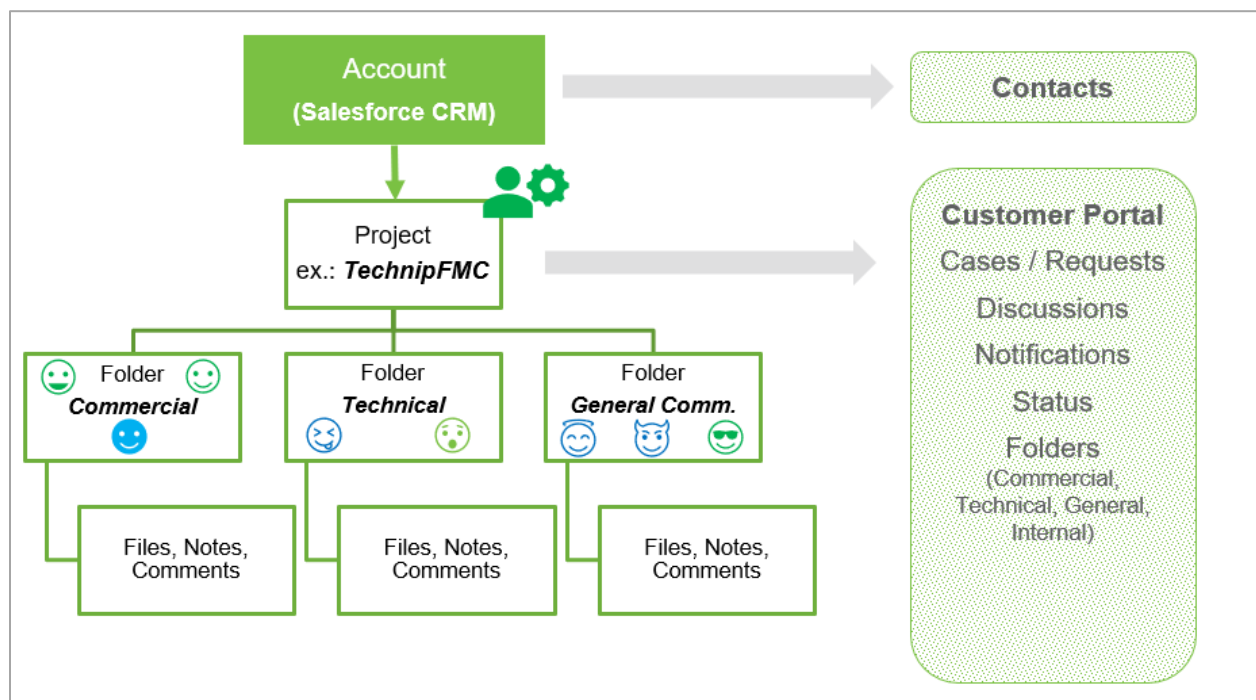


Daptiv PPM Migration to Salesforce Customer Communities

A business offering industry-leading Polypropylene Process Technology and Control Software in manufacturing specialty chemicals has been using Daptiv, a Portfolio Management (PPM) tool, since 2004 for sharing project documents (agreements, portfolio's, commercials) to collaborate with its customers.

There were ~170 active users who were accessing Daptiv including 40 different customers with ~155 customer users. There were about 12,000 files with ~550 GB of total storage within 60 projects and 165 folders.



Business Situation

The information in Daptiv was not integrated with rest of the customer information that is available in Salesforce CRM. Also, the cost of Daptiv license was quite expensive and with the growing need of licenses, it would cost a fortune.

Corporate Headquarters:



A manual process was followed to store the E-mail communications for the issues reported by customers. This was quite a tedious task and difficult to manage. Along with this, there was lack of visibility on usage of the system.

Solution

1. Migration of ~12,000 files from Daptiv to Salesforce along with the file meta data.
2. System allowed users to view/ edit the documents based on their project engagement. Capability to notify users when a document is uploaded\edited\deleted was also provided
3. Authorized business users had the access to delete and archive the documents
4. System had the capability to maintain document version
5. Latest version of duplicate files was migrated from Daptiv to Salesforce
6. System shall have the capability to display separate dashboards for customers and business users.
7. Hypercare support of few weeks was provided after the release of the customer portal
8. After hyper care, the project was handed over to the Amicus Application Maintenance Support team to take of any issues reported by the customers thereafter.

Solution Benefits

Reduced software licensing cost.

Single platform for maintaining all customer data & files.

Easy to setup accounts, projects and users

Ability to search for content within a file in global search

Develop a secure file storage and document management App that lets users upload and access files from within Salesforce.

Customer can also take advantage of Salesforce standard objects - Topics for FAQ, Library to store documents, Case to raise issues

Corporate Headquarters:

6th Street, New Shanti Nagar, Raipur (CG) 492001
Phone: +91 (771) 297-0280, +1 (443) 718-9255 Fax: +91 (771) 401-3102
answers@amicusglobal.com / www.amicusglobal.com
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Existing Salesforce Sales cloud platform can be extended with Customer Community application.

Business would be able to manage the content and security themselves.

Provide centralized platform to give ability to integrate CRM and technical data by leveraging the existing Salesforce foundation.

About Amicus Technology

Amicus Technology is a fast-growing company providing software development and IT consulting services to global enterprises for their business-critical challenges. Amicus Technology is a client centric global software development company providing software development, research, and web development, IT outsourcing services along with optimization and consulting services for your mission-critical business challenges. A company known for its comprehensive portfolio of services in domains like manufacturing, education, telecom and construction.

For more information, please visit www.amicustechnology.com or contact us at info@amicustechnology.com

Corporate Headquarters:

6th Street, New Shanti Nagar, Raipur (CG) 492001
Phone: +91 (771) 297-0280, +1 (443) 718-9255 Fax: +91 (771) 401-3102
answers@amicusglobal.com / www.amicusglobal.com
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