

Washington Center for Equitable Growth

Process Automations and Enhancements

COMPANY OVERVIEW

The Washington Center for Equitable Growth is a non-profit research and grant-making organization dedicated to advancing evidence-backed ideas and policies that promote strong, stable, and broad-based economic growth. The organization engaged HigherEchelon to help with advanced process automation and enhancement.

COMPANY PROFILE

LOCATION	Washington, DC
EMPLOYEES	40
INDUSTRY	Nonprofit
COMPETITOR	n/a
SOLUTION(S)	Sales Cloud
GO LIVE DATE:	03/10/2019



CHALLENGE

- Desire to automatically set certain fields on a custom object based on keywords in the names of uploaded files
- Users had to manually verify specific files required for a record had been uploaded.
- The organization has a custom object named Success Indicator 2.0, with a related list named Indicator Contact Role. Indicator Contact Role is similar to the standard Opportunity Contact Role object.
- When users wanted to add an Indicator Contact Role, they had to first manually select the correct record type and then add one contact at a time.
- Because of this cumbersome approach, many records were missing Indicator Contact Role data.
- The solution needed to automatically select the correct record type for the Indicator Contact Role based on the record type of the parent Success Indicator, and to allow for the entry of multiple contacts at once.
- Validate that, based on record type, a Role also needed to be specified before saving the record.

SOLUTION

- Created a combination of Apex trigger, Custom Metadata Types and Flow to automate the setting of picklist fields for the custom Application object based on the names of files attached to the record.
- Created several Lightning Components that could be embedded in a Screen Flow for data entry of Indicator Contact Roles.
- Created an Initial data validation handled by the Lightning component, and a final validation check done in the Flow.
- Created an Indicator Contact Roles data entry screen that is conditionally rendered on a record page until at least one required Contact Role type is entered. Subsequently, the data entry screen is no longer visible but is still accessible via the Set Contact Roles button on the related list

RESULTS

- Report status flags are automatically set when files with a given name are uploaded
- Users can enter up to 10 Contact Roles at a time for a given record with much fewer clicks than previously.
- Users have a visual indicator on the record page if no Indicator Contact Roles are specified.



More Detailed Info and Quantitative Results

[Color Commentary and Notes About Details of Deal or Implementation]

NOTES

- The apex trigger fires from activity on the ContentDocument object and calls a Flow that loops through all files related to the Application, looking for specific keywords. The Flow to be called can be defined via a Custom Metadata Type record and depends on the type of the parent object. This allows for easy addition of future automations without the need to touch the underlying Apex code.
- Lighting Components embedded in a Screen Flow were used to generate the main Indicator Contact Roles entry form, create custom navigation on the Flow, and to inform users of a successful save.

QUANTITATIVE RESULTS IF AVAILABLE

- Improved tracking of file receipt for Applications
- Improved data quality for Success Indicator records
- Direct quotes from org administrator Daria Stepanova:
 - “80% of success indicators have more than 1 contact role. Of those, 47% have 2, 22% have 3, and 13% have more than 3. So we can say that data entry has become at least two and a half times faster.”
 - “There are time savings in terms of training/re-training (for staff who enter data at the end of every quarter, after having an “oh, my god I’m behind” moment) – it’s easier to grasp now that entering a success indicator is a two-step process.”



Solution Detail

MORE DETAILS

Competitors of Salesforce engaged in sales cycle:	<i>n/a – existing implementation</i>
Previous technology replaced by Salesforce:	<i>n/a – existing implementation</i>
Salesforce products deployed:	<i>Sales Cloud</i>
Customer Business Model (B2B, B2C, or Both)	<i>Both</i>
Salesforce Product features:	Salesforce Platform: Custom App Dev (Visualforce and APEX,); Custom App Dev (Lightning and Javascript); Application Development Lifecycle & Deployment; Sales Cloud: Workflow and Approval Process
If using Service Cloud, list use case (e.g. customer support, call center, field service, telesales, etc.)	<i>N/A</i>
Integrations:	<i>none</i>
AppExchange Apps/Partners	<i>No additional apps added</i>
Solution 'Go Live' date:	<i>03/10/2019</i>



Picklist fields auto-set based on names of attached files

The screenshot displays a Salesforce record page with a sidebar on the left and a main content area on the right. The sidebar contains a 'Files (3+)' section with three file entries. The middle file, '2017.6031_..._Int.Narrative_3-...', is highlighted with a red box. The main content area shows various picklist fields. The 'Institutions' section contains 'Interim Reports Received' with the value 'Narrative', also highlighted with a red box. The 'Grant Award Information' section is partially visible at the bottom.

Files (3+)

- 2017.6031_..._NCE
Nov 29, 2018 • 21KB • docx
- 2017.6031_..._Int.Narrative_3-...
Mar 26, 2018 • 787KB • pdf
- 2017.6031_..._Int.Narrative_3-...
Mar 26, 2018 • 12KB • docx

Payment 1 Date
9/15/2017

Payment 2 Date
4/15/2018

Interim Report Date
5/31/2019

Final Report Date
2/28/2020

Number of No Cost Extensions granted
1

Institutions

- Payment 1 Made
- Payment 2 Made
- Interim Reports Received**
Narrative
- Final Reports Received

Grant Award Information

- University Contact First Name
- Fully executed agreement received



Custom Metadata

Allows admins to launch Flows related to Files for different parent records without modifying Apex code



SETUP

Custom Metadata Types

File Automation Flow

File Automation Flow Detail

[Edit](#) [Delete](#) [Clone](#)

Label	Application	Protected Component	<input type="checkbox"/>
File Automation Flow Name	Application	Namespace Prefix	
Parent Object	Application		
Flow to Launch	Set_Application_Fields_Based_on_Filename		
Created By	Natalya Murphy , 1/22/2019 10:16 AM	Last Modified By	Natalya Murphy , 1/22/2019 10:16 AM

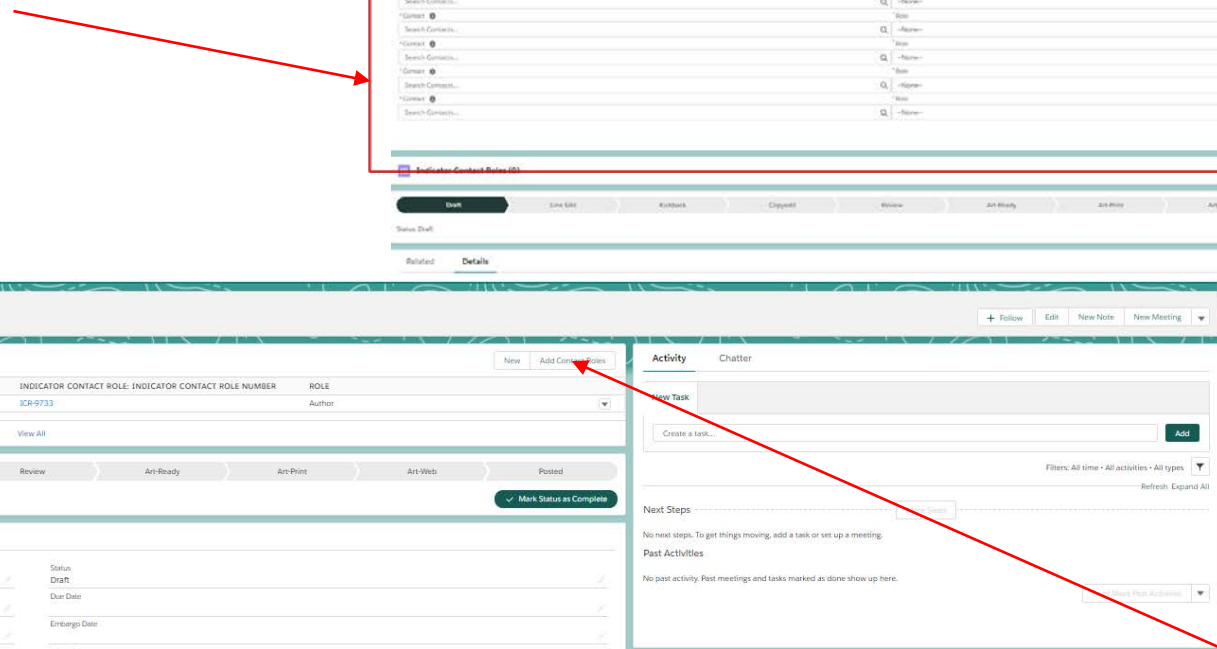
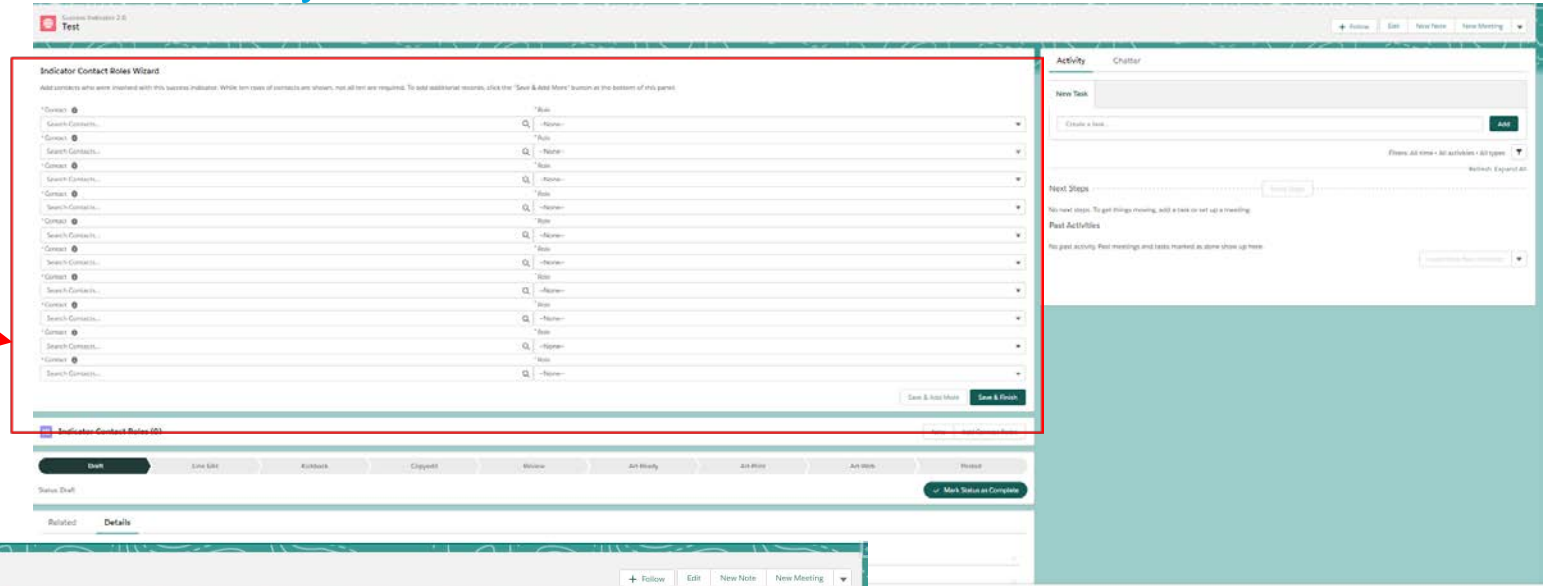
[Edit](#) [Delete](#) [Clone](#)



Success Indicator record page

Data input flow visible/hidden based on whether key contact roles have been entered

Input form displays at top of record screen to prompt user to enter contact roles



After at least one relevant contact role is entered, input form is hidden but still accessible from a button

Contact Roles Wizard – auto-determined record type and fields

Indicator Contact Roles Wizard

Add contacts who were involved with this success indicator. While ten rows of contacts are shown, not all ten are required. To add additional records, click the "Save & Add More" button at the bottom of this panel.

* Contact ⓘ	* Role
Search Contacts...	--None--
Search Contacts...	✓ --None--
Search Contacts...	Owner
Search Contacts...	Author
Search Contacts...	Manager
Search Contacts...	Final Approver
Search Contacts...	--None--
Search Contacts...	--None--
Search Contacts...	--None--
Search Contacts...	--None--
Search Contacts...	--None--
Search Contacts...	--None--
Search Contacts...	--None--
Search Contacts...	--None--

Save & Add More Save & Finish

Auto-detected record type determines the values available in the picklist and whether the Role field is required or optional



Sharing Guidelines

These questions are required in order for your story submission to be accepted. Please answer these questions to the best of your ability.

We will not contact the customer without reaching out to you first.

SHARING USE CASE/SCENARIO:

Can Salesforce AEs share this story and overview slide in sales settings?	<input checked="" type="checkbox"/> Y <input type="checkbox"/> N
Can Salesforce AEs mention the customer name in sales settings?	<input type="checkbox"/> Y <input checked="" type="checkbox"/> N
Is this customer willing to act as a reference customer for prospects?	<input checked="" type="checkbox"/> Y <input type="checkbox"/> N
Would the customer be willing to speak at Dreamforce or other events?	<input checked="" type="checkbox"/> Y <input type="checkbox"/> N

PARTNER INFORMATION

Name of reference approver:	Tim Pash
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