



# Salesforce Version Downgrading and Data Migration for IT Services & Cyber Security Solutions Provider

Downgrading Editions to Save Money Without Losing Time

## OBJECTIVE

To save money via cost of operations by downgrading customer's existing Salesforce Professional edition to the Salesforce Essential edition.

## CHALLENGES

- Unavailability of API in the Essential edition resulted in a lot of manual work in creating metadata (custom fields, reports etc.) which would not have been the case if API were available.
- Time-consuming data-cleansing activities in Excel sheets to make room to upload notes and attachments.
- Aggressive project timeline for migration.

## APPROACH

We implemented the Agile Methodology to develop and deliver client expectations in sprints.

The 5D approach involves:

- Understanding the client's requirements and planning to implement a suitable solution.
- Building an integration solution to find the root cause of client dissatisfaction in the higher version of Salesforce.
- We focused on creating metadata manually due to lack of API, exported data from the existing version and ensured stringent data cleansing and imported data to Essential edition using Dataloader.io.
- Applying the fixes and testing the solution through different scenarios to ensure smooth performance and efficiency.
- Organizing a solution demo and review session with our client.
- After the final review, we handed over the project.

## BUSINESS BENEFITS

- Our client can access the same data and functionality in a more compatible version of Salesforce at a lower cost compared to the higher version.

## CLIENT FEEDBACK

"Absolute pleasure working with CloudQ! Thanks to Michael Goggin and his team! Great appreciation for the quality of their work and their efficiency!"

## INDUSTRY

IT Services

## CUSTOMER PROFILE

US based IT services and IT solutions company with 20+ years in the IT Industry.

## TECHNOLOGY AND TOOLS

- Salesforce Sales Cloud
- Dataloader.io
- Data cleansing using CSV/Excel

## ABOUT CLOUDQ

CloudQ helps companies succeed by consulting, implementing solutions, and providing certified professionals. We're one of the INC 5000 fastest-growing private companies, and we're based in Alpharetta, GA. We specialize in cloud-based technology implementation and are a Silver Consulting partner with Salesforce and have a transparent, highly-efficient, customer-centric business model.

## CONTACT

6110 McFarland Station Dr,  
Suite #201, Alpharetta,  
GA, USA – 30004.



[www.cloudq.net](http://www.cloudq.net)

[info@cloudq.net](mailto:info@cloudq.net)

US: +14044101441

IN: +914714067172