OBJECTIVE

To support our client in running their business with their easily understandable activity features and automation processes for day-to-day operations.

CHALLENGES

- Building the Custom Activity Component.
- Adding a feature, Notify Users, in our custom activity component which sends an activity update to selected users.
- Creating Flow Builder to match the business requirements with mail triggers and notifications.

APPROACH

We implemented the Agile Methodology to develop and deliver client expectations in sprints.
The 5D approach involves:

- Understanding the client's requirements and making a plan for a suitable solution.
- Building an integration solution to add custom-activity components and features like Notify User and Flow Builder which works with their existing Activity Features and Automations Processes.
- 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 clients.
- After the final review, we handed over the project.

BUSINESS BENEFITS

- Managers can easily track work done by their subordinates through the update. Mail is received for each action performed by the team and reports are created to improve productivity.

CLIENT FEEDBACK

"This company goes above and beyond and does not stop until their customers are satisfied. We highly recommend them."

"They produced excellent work with few instructions in a short period. Happy with everything they have done. Highly recommend them!"

INDUSTRY

Financial Services

CUSTOMER PROFILE

US based company, in business 5+ years, that provides individuals with many tiers of assistance in the housing process..

TECHNOLOGY AND TOOLS

- Salesforce Sales Cloud
- Apex Classes
- LWC Component(s)
- Flow Builder

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.

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