



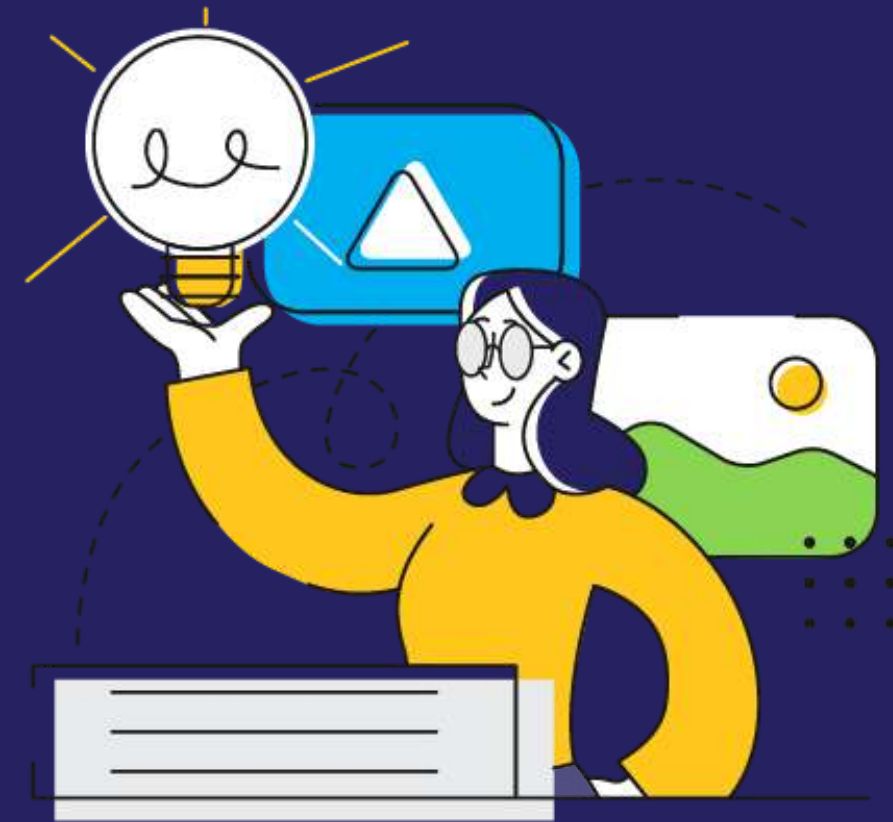
# Case Study

## Non-Profit in Educational

### Industry: Technical Debt

# The Client

Our client is addressing the low college graduation rate of first-generation students from under-resourced communities. They believe that students should have a mentor and guide when they apply for college, throughout their college years, and as they land a job. To help them with their mission, they brought in Salesforce.



# The Situation

Unfortunately, Our client has amassed overdue technical debt by the end of 2021, especially as their Salesforce Admin was transitioning out of the organization. One of the technical specialists listed the technical debts, identifying the improvements necessary for their Salesforce implementation.



# APEX Code Improvements

The list enumerated two categories. Here are some of the issues for each of them:

- Multiple Triggers on the same object
- SOQL inside loop
- Test methods with no assertions





# Process Builder Improvements

- Update College Lists based on College Data Changes
- College Competitiveness Updated
- College List Affordability For Site
- Set Initial Combined Competitiveness Ranking
- Update Combined Competitiveness Ranking
- College Attending on Program Record NEW
- Current Academic Term is Changed
- Update Task Owner when Advisor is Changed
- College Student is Active
- Student Competitiveness Updated



# The Project: Technical Debt

Our client enlisted the help of Application House to accomplish the technical debt.

## APEX Code Improvements:

- Multiple triggers on the same objects
- Hardcoded ID
- SOQL inside loop



# Process Builder Improvements

Because Salesforce no longer recommends Process Builders, Application House is working on converting the Process Builder to Flows as this is now the recommended tool of Salesforce now. Some of the issues addressed while doing the conversion are:

- Minimize yearly updates on Process Builders relating to year/date adjustments using custom settings and formula fields
- Remove the use of Hardcoded IDs
- Additional Entry Criteria to make sure the flows run only when needed.



## Additional Improvement

Application House has also worked on other issues that are not on the list, including:

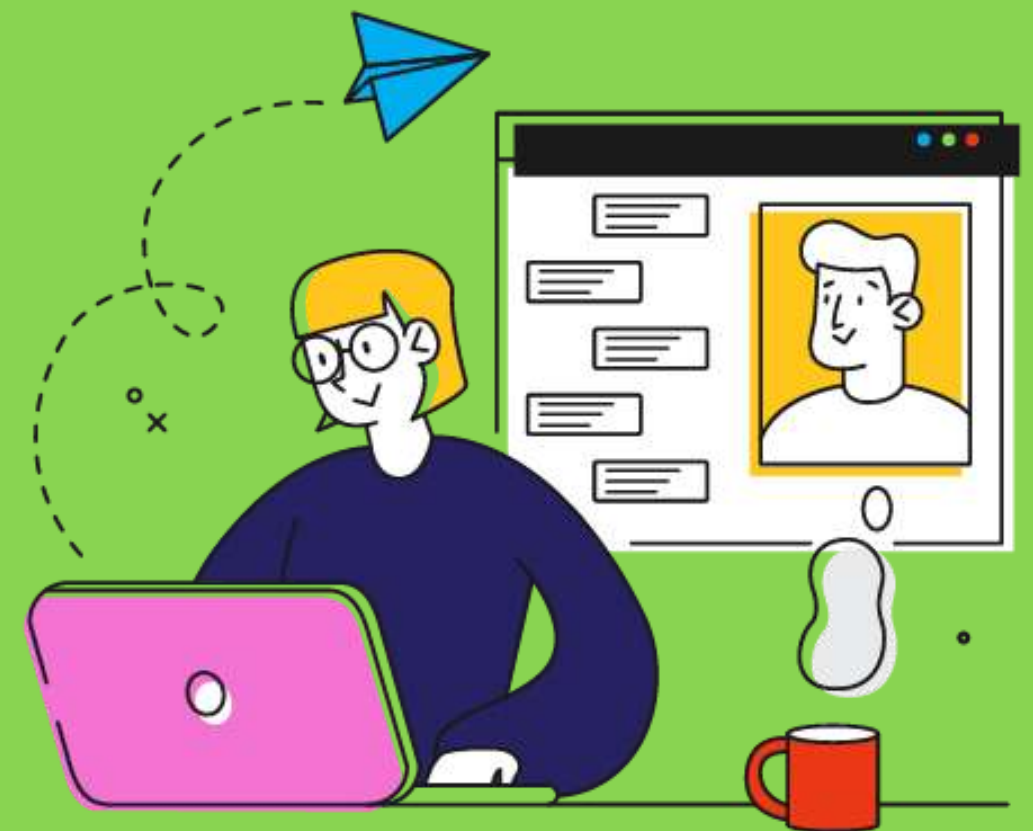
- Decommissioning of unused DLRS (Declarative Lookup Rollup Summary) rollups
- Consolidation of duplicate Custom Settings/Custom Metadata





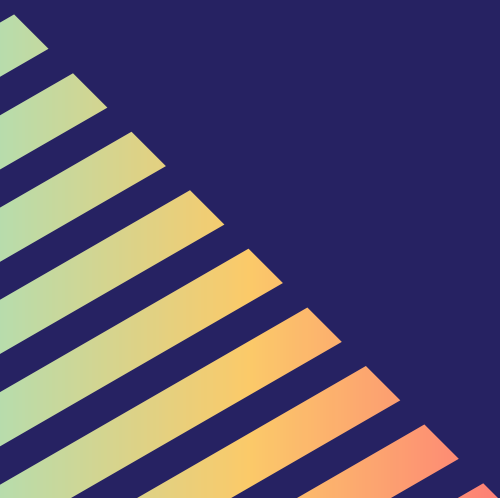
# The Purpose of the Project

The technical debt project targets items that optimize the client's processes and ensure they follow the best practices in implementing Salesforce. In doing so, Our client gets the most out of the platform.





## The Results

- By accomplishing the technical debts, our client brings their Salesforce up to standard, optimizing the user experience for their organization.
  - In the list, most of the improvements Apex Code items were improved to prevent security issues
  - While the Process Builder improvements ensure our client processes run faster. As a result, our client can now update over twenty records at a time compared to the previous five.
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# The Application House Value

Application House started its part in the technical debt project with only one man on the wheel. But after the in-house Salesforce Admin was transitioned out, this person had to assume other tasks relevant to the freshly vacated position. So Application House dispatches additional sets of capable hands.



# The Application House Value

We bring to the table our dedication as we deconstruct your needs to find the most fitting solutions that will serve you for a long time. Our team ensures your Salesforce will streamline and run your operations smoothly. Our team is with you from start to finish, helping you navigate any changes that may come along the way. We're here to get you to your success.

To help you level out uncertainties, we're currently offering the pro bono program. By helping your causes as a nonprofit, we do our part to better the world and bring more good to people.



# Application House's Salesforce Certification

## Admin Certifications



salesforce

## Architect Certifications



## Consultant Certifications



## Developer Certifications



# Client Feedback

*We brought on Application House to support our team as our in-house Salesforce Admin was planning to transition out of the organization. The Application House team did an exemplary job learning about the organization and our data needs in order to support us. I have worked with data consultants in the past who struggled to learn all of the nuance of our program and our staff's needs, but I had the complete opposite experience with Application House. Over time, we were able to transition from merely focusing on short-term "survival" maintenance to bigger-picture projects like cleaning out old fields, relieving technical debt, and completing important documentation work to help us maintain our systems over time*

## Project Review - Salesforce Verified



Find out more client feedback at Salesforce AppExchange

<https://appexchange.salesforce.com/appxConsultingListingDetail?listingId=a0N3u00000PsCD6EAN>





Client company names can be shared on request

Ready to get the right solutions to your needs?

Email us at [sales@applicationhouse.com](mailto:sales@applicationhouse.com)!

**Contact Us Today**



