

CASE STUDY #1

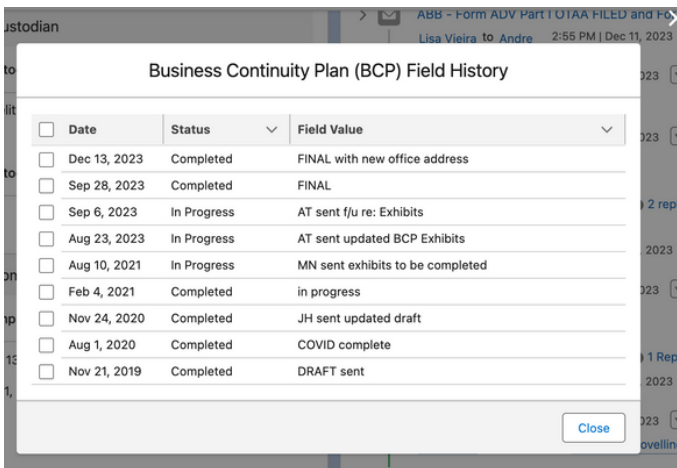
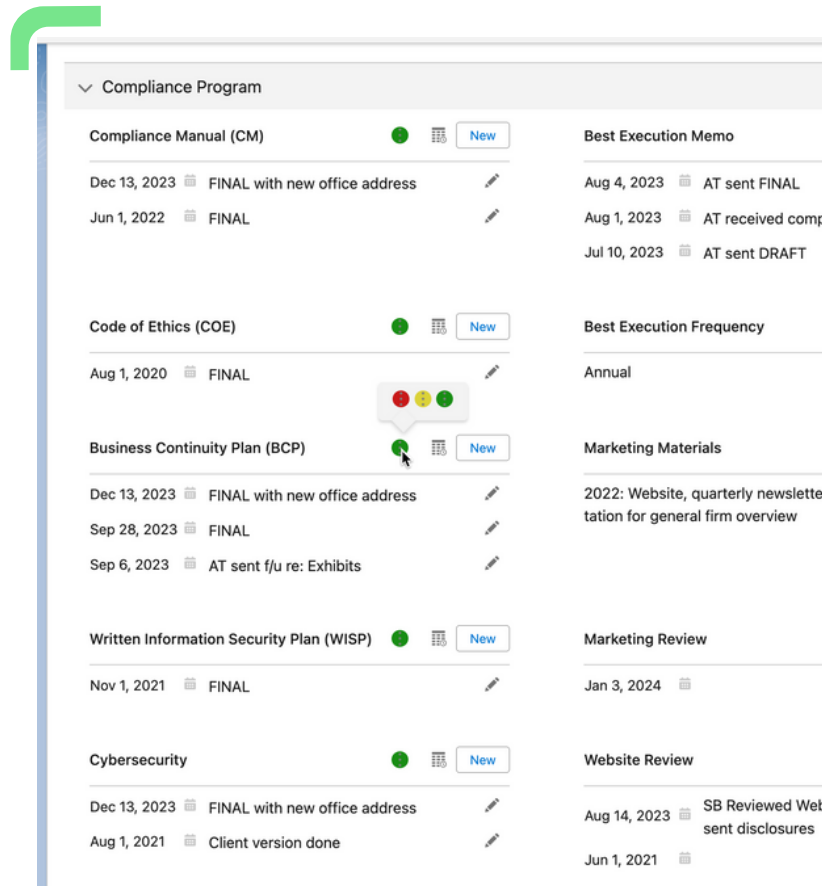
Discover

How LeadsSource helped our client - a compliance company - clean up their Salesforce Org, prevent data loss, and eliminate hours of unnecessary processes from their daily workflows.

Background

The client currently uses the Account object to store most of their information. It consists of a large pile of fields, mostly text, that get overwritten, used as a notepad, and become disorganized.

As a compliance company, it's important for our client not to lose information and retain historical data, which is currently at threat of being lost. The goal is to get these cleaned up in a way that they won't lose data and can easily view, track, and report on what they have. The client does not want the UX to become difficult to use - they want it to keep it very similar to look at and use.



Solution:

LeadsSource built a custom UI that breaks each field into a trackable record. Each field now can have multiple entries that will never be overwritten, as well as a timestamp of when the entry was made. A clean UI shows only the last 3 fields at a time, however all history can be easily accessed right on the spot.

Additionally, there is a "status" indicator to show if the field needs attention or is up to date with their compliance. All fields are completely customizable by section and location on the layout, as well as fully reportable, saving our client more time and energy throughout the day.

Tell us your challenge. We're here to help.

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