



CloudSage Consultancy Inc.

# Salesforce Project Highlights

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## Formstack ↔ Salesforce Real-Time Lead Capture

### Challenge:

Automate the transfer of form submissions from Formstack into Salesforce to eliminate manual entry and delays.

### Solution:

- Configured Formstack webhooks to trigger on form submission.
- Created a secure integration using Salesforce Named Credentials and Apex REST services to receive data.
- Implemented field mapping from Formstack to Salesforce Lead, Contact, and Case objects.
- Built deduplication logic in Apex to prevent duplicate records.
- Added error handling with automated email alerts to admins.

### Result:

- Reduced lead creation time from 2 to 3 days to under 5 seconds.
  - Improved data accuracy by 98% through real-time validation.
  - Freed up 5+ hours of admin work weekly.
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## Multi-Step Data Processing via Formstack & Salesforce Flow

### Challenge:

Capture multi-part application forms in Formstack and process them into Salesforce with conditional logic.

### Solution:

- Mapped Formstack multi-page form fields to Salesforce custom objects via API.
- Built an Apex service to process conditional business rules (e.g., auto-create Opportunities for qualified leads).
- Created a Salesforce Flow to route records to different queues based on form responses.
- Added automated follow-up email via Salesforce Email Alerts.

**Result:**

- Increased conversion rate by 22% with faster applicant follow-up.
  - Reduced manual triage work for the sales team by 75%.
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## DocuSign ↔ Salesforce Contract Automation

**Challenge:**

Streamline contract execution by integrating DocuSign with Salesforce.

**Solution:**

- Connected Salesforce to DocuSign via the DocuSign REST API and Apex callouts.
- Auto-generated agreements in Salesforce using merge fields and sent them directly for e-signature.
- Set up callbacks from DocuSign to update contract status and attach signed PDFs to Opportunity records.
- Implemented error logging and retry logic for API call failures.

**Result:**

- Reduced contract turnaround time by 60%.
  - Ensured all signed agreements are automatically stored in Salesforce for compliance.
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## Eventbrite ↔ Salesforce Attendee Management

**Challenge:**

Automatically sync event registrations from Eventbrite into Salesforce for sales and marketing follow-up.

**Solution:**

- Connected Eventbrite's API with Salesforce using Named Credentials and Apex REST services.
- Created custom objects in Salesforce to store attendee and ticket data.
- Mapped event sessions to Campaigns in Salesforce for reporting.
- Built automation to trigger thank-you emails and post-event surveys.

**Result:**

- Eliminated manual attendee list uploads.
  - Enabled sales team to follow up with attendees within 24 hours of event close.
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