

Systems change - your data shouldn't get lost in the change process!

MIGRATING HISTORICAL FILES



THE CLIENT

- Financial Services
- Systems: legacy Salesforce system & new Salesforce system
- Company size: 50-100 employees

Financial Services



SMB



Data



Salesforce Platform



THE SOLUTION

Using Python and a SQL staging database, the Coordona team created a custom solution to first transfer all Files and Notes into the new Salesforce instance, then associated each File and Note with the appropriate parent record. The migration was done overnight, avoiding any business disruption. At the outset of the next business day, all Files and Notes had been loaded, associated, and were fully editable and searchable by the client team.



THE COST

\$3,500

THE CHALLENGES

- Over 25,000 notes and files stored in a legacy CRM
- Employees unable to access or modify historical records
- Maintaining old system to allow access cost time and money, in resources and licenses
- Salesforce-to-Salesforce migrations are not readily available via tool or AppExchange

THE OUTCOMES

- Notes and Files transferred to current CRM system
- Notes and Files accessible and editable, associated with correct records - not just archive access!
- No interruption to production and day-to-day business
- Ability to sunset old system, saving an estimated \$5k/month in licensing costs

FOR MORE INFORMATION, PLEASE REACH OUT AT HELLO@COORDONA.COM