

Salesforce Classic to Lightning Migration for a Wealth Management Organization



About The Client

An independent consulting firm that delivers management and technology services to wealth managers. They help individuals and wealth management firms optimize their technology investment to reduce operational risk and advance business management.

Location: San Francisco, CA
Size: Start-up

Time to Market

Resources - 2 Salesforce Developers
Tenure: 6 weeks

Case Overview

The client's Salesforce Classic environment and related interfaces were customized to execute complex end-to-end business processes as per their requirements. They wanted to upgrade Salesforce to the new User Interface, i.e Lightning. However, Visualforce pages and JavaScript buttons in their Salesforce org prevented a simple migration to Lightning.

They needed a business partner who could transition this customized Salesforce org to Lightning smoothly and efficiently, with as little disruption as possible. Furthermore, someone who could understand their business processes and integration to back-end systems.

Hexaview's Solution



Step 1
Discover



Step 2
Roll Out



Step 3
Optimize

After analyzing the challenges, the team of Hexaview came up with their own solution for implementing the components. The solution was as follows:

- Assessed the Visualforce pages and created a migration path that maintained the existing functionalities.
- Converted Visualforce pages and JavaScript buttons to Lightning components and quick actions respectively.
- Optimized the code and developed Aura components to create customized layouts and dashboards.
- The migrated elements were made available for integration testing and user training.

Technology Stack

- **Lightning Aura Components**
- **Apex**



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Salesforce Classic to Lightning Migration for one of the largest accounting firms in the US



About Hexaview

A digital transformation firm focused on providing Technology Consulting, Development Centre, Captive as a Service with an innovative approach and latest technology. With both financial and technology insights, Hexaview Technologies endeavors to provide secure, optimal, and quality solutions to your unique business requirements.

Area of Specialization:

Salesforce, Big Data, AI & ML, Cloud Computing, Business Intelligence.

Our flagship Products:

ReportWa, PDF Extractor, and Video Statements enable data visualization and automation in reporting as well as data extraction.

Impacts

Our solution and implementation provided benefits specific to the client's business and made the transition as uncomplicated as possible.

- **A simple, intuitive user interface:** The new Lightning user interface is highly flexible and robust as compared to Classic.
- **Enhanced Productivity & Efficiency:** Migrating to Lightning resulted in enhancing their business efficiency by around 50%.
- **Enhanced Reports, Charts, and Dashboards:** The reports and dashboards became more interactive, easier to navigate, and edit.

Key Success Factors

- Hexaview is a registered Salesforce consulting partner, having a team of globally certified engineers and QAs with deep domain knowledge.
- Being a leading digital transformation firm, Hexaview's major success lies in its relationship with technology. We carefully analyze each tech decision and are committed to innovating our processes without end.
- We are highly flexible with the solutions to meet the client's unique requirements.
- Our 11+ years of experience in the FinTech domain made the implementation swift and smooth.



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