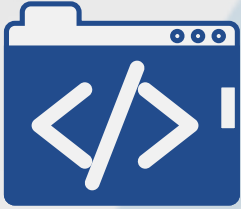


Data Analysis & Mapping For Salesforce - SaaSOptics



Hexaview



About Our Client

The client is a software development firm based in the United States. They offer innovative and customized solutions for timekeeping & payroll management, production tracking, and other products to track the employee's efficiency.

Location: U.S.

Size: Enterprise



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.

Time to Market

Resources: Salesforce Architect, 2 Salesforce Developers, Project Manager

Tenure: 1 year

Client's Challenges

- Data stored in 'SaaSOptics' and 'Salesforce CRM' is **inconsistent**, leading to several crucial concerns.
- Disordered, inconsistent data **hampers analytics, reporting, & decision-making** affecting revenue, analysis, and operations data.

Hexaview's Solution

- Performed a **thorough analysis** of data and **identified the differences** between the data sets across both platforms.
- We **successfully mapped** the order processing, customer association, contract association, "billed to" and "shipped to" addresses, and invoice data.

Impact

- **Achieved a level of expertise** of the sales order to invoice data flows, leading to identification of Salesforce to SaaSOptics system best practices.
- The outcome will be **consistent data** across SaaSOptics and Salesforce platforms, resulting in **accurate data and reporting**.

Key Success Factors

- An energetic development team with expertise in Salesforce & high business acumen.
- A comprehensive evaluation of business as well as technical requirements.



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