

CriticalRiver helped a Hi-tech company migrate to Salesforce Lightning that simplified, modernized, and enhanced customer digital experience



The Customer

The customer is a large IT hardware major office products and services in areas of wide-area network (WAN), smart service platforms and managed WAN services.

The Challenge

CriticalRiver was engaged to identify and solve the following challenges:

- The customer was using Salesforce Classic platform that was unable to sustain and meet the growing company's requirements
- Lacked a 360-degree of the customer
- Serious limitations on the classic console, browser incompatibility, limited multi-language support
- Major constraints in customizations, chatter messenger and reports generations
- Business continuity of the customer during the migration process

The Solution

- Salesforce Lightning (LEX) migration is implemented on Sales Objects like Home, Chatter, Accounts, Contacts, Leads, Opportunities, Products, Price books, Quotes, and some custom objects.
- Opportunity clone with Products is a standard classic functionality and this feature is not available in lightning, Salesforce itself does not provide it.
- To meet this gap, we implemented the custom component on Opportunity clone with Products functionality in lightning
- Optimized the standard lightning page by creating tabs to display related lists or set of fields of the same record in it.
- This makes the user easily access or track the primary information on the lightning page.
- Created Lightning components to replicate the functionality of complex javascript buttons that are only compatible with classic but not lightning.
- We have created a custom-lightning-components to create new list buttons

The Benefits/Results

- Integrated assets allowed the sales reps to have a 360-degree customer view
- Gain visibility into every step of the Franchise On-boarding process
- Increase productivity and realize benefits quickly
- Reduce delays caused by lost information and review or approval bottlenecks
- Improved time to market of products and services

Industry: Hi-Tech

Customer:

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Solution Component

- Salesforce Lightning Experience (LEX)

