A UNIQUE, DISCIPLINED & EFFICIENT FILE MANAGEMENT SOLUTION IN SALESFORCE FOR A LEADING PHARMACEUTICAL COMPANY

Developing a systematic folder structure in-line with the client's Salesforce instance that allows them to easily categorize and store files. A challenging attempt in Salesforce that gave us immense scope to research, discover and implement the finest solution.

THE CLIENT

An American based science-led biopharmaceutical research company specializing in Oncology product development and innovative medicines that are used worldwide. The client is committed to bring in positive changes in the lives of patients with the power of scientific discoveries.

THE BACKGROUND

The client's CRM system (Salesforce CRM) had a huge amount of files under the Opportunity View option. The files pertaining to multiple categories were kept sporadically in the system. A category-wise arrangement of files can help the client to easily manage the data and close the deals rapidly. The requirement was to create a folder structure in Salesforce that also allows user to download files to the system, drag the files to the appropriate folders or delete the unwanted files. The solution must also ensure that there is NO data duplication.

It isn't easy to build and integrate a folder structure in-line with Salesforce. After approaching multiple vendors, the client joined hands with Suyati to implement a unique and optimal solution to manage the files in their existing system. Read further to know why creating a folder structure to manage files in Salesforce involves numerous challenges and how Suyati's Salesforce experts solved this.

THE CHALLENGES

The project was one of the best R&D (Research and Development) projects executed successfully by Suyati. The project is a testimony of Suyati's emerging Salesforce powerhouse. This assignment had numerous challenges that made us spend a good amount of time in fruitful R&D. It was an opportunity for Suyati's think tanks to get together, brainstorm, learn, experiment and discover more in Salesforce.

Having said this, why is this a unique Salesforce project? Following are the major hiccups that we had to overcome:

- Salesforce does not offer a native file management system or a folder structure
- Data gets downloaded and stays in the system without a proper categorization based on file type/ data type
- Creation of a folder structure that is 100% in-line with client's Salesforce instance
- The folder structure should be easy to customize and configure
- Introduce folders and subfolders based on file classification
- Absence of a proper category-based file management system
- Difficult to identify/ associate the right type of data
- Expand the file storage capacity for a seamless user experience
- Inability to upload multiple files at a time
- Extensive usage of scripts to achieve the desired results
- A complex implementation as tough as the functionality of File Explorer in Windows

THE FOREMOST CHALLENGE: There is no pre-built solution available for creating folder structure in AppExchange.
There were some solutions that couldn't deliver the required and best results to the client.

THE SOLUTIONS

1) **Established a default folder structure** under Opportunities tab that will have folders and sub folders where you can stack data. So when a new opportunity is added, a folder structure is automatically created and displayed for that particular opportunity. Though the folders are pre-built, you can add/ remove sub folders within the master folders.

2) Besides, we introduced the **folder view functionality** to view the files inside respective folders. This considerably saves the time of the user who doesn't need to navigate extensively to find out the required file(s).

3) **Enhanced user experience** by introducing 'right click' menu options for folders.

4) **Introduced 'drag & drop' functionality** to improve file upload experience and enabled provision to manipulate the complete list of attachments in the respective folder structure.

- Added the **Drag from desktop feature** that allows the user to select a file from desktop and move it to the required folder.
- Allows user to **drag a file from one folder to another folder** using the File View visible on the right-hand side of the screen.
- You can also **drag and drop email attachments to folders** depending on the category of the attached files.

THE TASK HIGHLIGHTS

A Unique Folder Structure	• **Folder View** • **Right Click Menu Option** • **Displays File Count**
Enhanced File Upload Feature	• **Drag from local computer to folder** • **Between Folders in the Folder Structure** • **Drag & Drop Upload Functionality**
View & Manage Attachments in the Opportunity	• **Drag & Drop Upload Functionality from Attachments to the Folders**

SALIENT FEATURES IMPLEMENTED

The assignment was aimed at enhancing the functionality and user experience of their existing Salesforce instance. This was done by introducing Folder structure in the Opportunity view to ensure: (a) efficient file management and (b) user friendly File Upload features with drag & drop functionality.
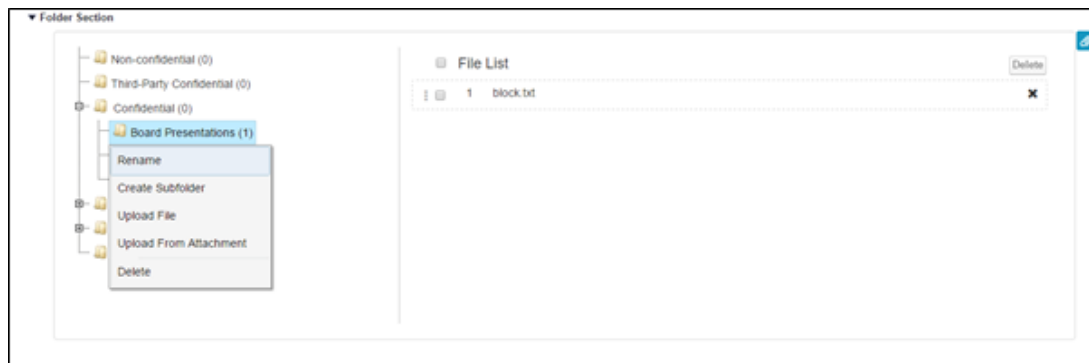
- **Folder structure:**

The folder structure was created using the jsTree. The language used for building business logics is Apex. Apex is based on familiar Java idioms, interpreted, executed, and controlled entirely by the Force.com platform. It is integrated, automatically upgradeable, and simple to use, easy to test and designed to thread together multiple query and DML statements into a single unit of work. When an Opportunity is created, a predefined folder structure is created on the folder section.

- **File Upload:**

We can upload files to the folders by right clicking on the folder> select Upload > select Files (multiple file uploading is possible) that you want to upload. The second way to upload files to the folder is the drag and drop functionality. Drag files from your local system and drop it into the folder. This feature also facilitated dragging from desktop as well as dragging a file from one folder to another on the File View option itself.
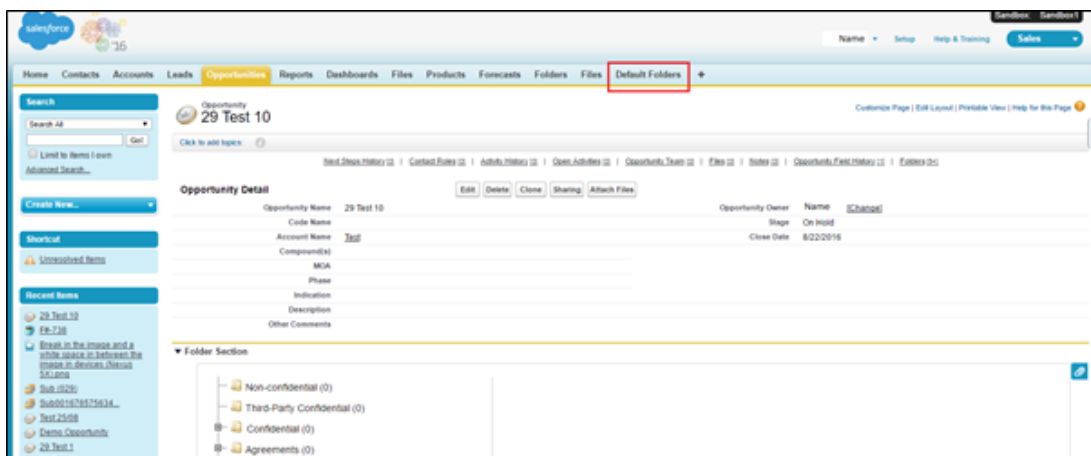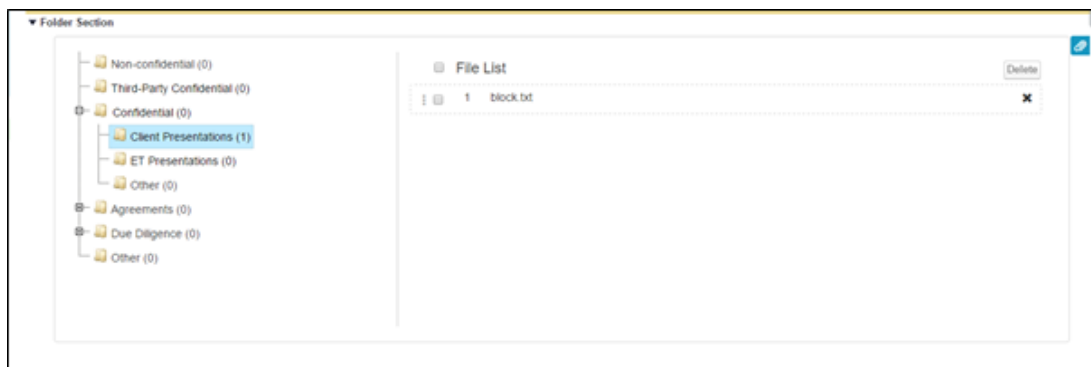
- **Moving Attachments to the Folders:**

  Attachments can be copied to the folder either by right clicking on the folder and selecting 'Upload from attachments' (multiple attachments can be copied) or by clicking on the Attachment and dragging that to the desired folder.
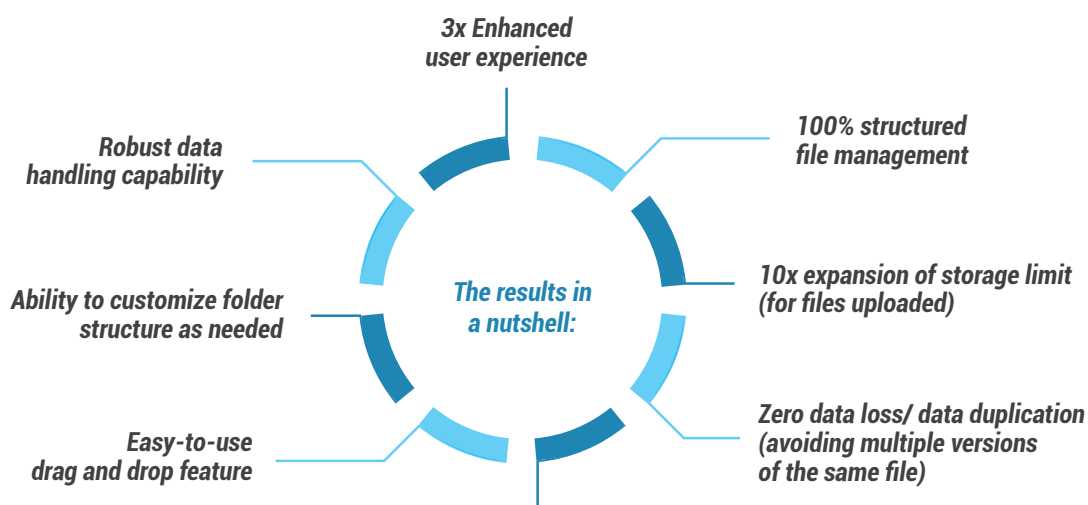

- **File Count:**

  When you select a folder, it would display the total number of folders inside that parent folder. Similarly, when you select a sub folder it will show the total number of folders within the selected folder.

THE RESULTS

The project witnessed the perfect blend of UI proficiency and technical expertise. Suyati's UI team supported the Salesforce experts to deliver amazingly. The UI team's contribution towards improving the look and feel of drag and drop feature was acknowledged very well by the client. Being an AppExchange Consulting Partner, we just did everything we could to enrich the usability of client's system.

Creation of a customizable folder structure also helped the client to give up using other systems like Box, Dropbox, Google Drive etc. Salesforce doesn't offer an in-built drive for storing data like Google. But we customized it using ForceTKJavascript library.

*3x Enhanced
user experience*

*Robust data
handling capability*

*100% structured
file management*

*The results in
a nutshell:*

*Ability to customize folder
structure as needed*

*10x expansion of storage limit
(for files uploaded)*

*Easy-to-use
drag and drop feature*

*Zero data loss/ data duplication
(avoiding multiple versions
of the same file)*

THE ENGAGEMENT MODEL

The project was executed in a Fixed Price model with proper communication carried out with the client using WebEx and Skype. There were weekly meetings with the client to update the progress and discuss the work, suggestions and other concerns. The Fixed Price Model ensured more transparency on the workflow.

Advantages of Suyati's Fixed Price Model:

• Developing and packaging apps easily
• Coordinating well with the Security Review Process
• Efficient License, Release and Patch Management
• AppExchange Product and Publisher Listing and Branding
• Installation, Integration and Publishing apps to AppExchange
• Clear visibility on the scope of the project including timeline and deliverables

HOW DID IT GO?

The client was very impressed with the Salesforce expertise of Suyati. This is how they reacted to the results delivered:

• This is a novel and unusual application in Salesforce – creative and totally new; haven't seen anything like it.
• The user interface is very intuitive and straight-forward to use. It "fits".
• The automation that links emailed attachments is innovative and easy-to-use, as well.

CLIENT SAYS:

- Aaron Ayer, President, The Hunley Group, LLC

"Suyati's Salesforce team built a novel and value-added Salesforce by-record file folder application for our client. There was no native or AppExchange application that came close. The specified functionality was solidly met with an intuitive and easy-to-use UI. It also includes automation to pull in email attachments that works seamlessly. For this complex project, Suyati beat their promised delivery dates, stuck to budget, and QA'd a product that we could find no bugs in. Those few sentences describe the implementation partner we're all looking for – but rarely find. Suyati has my strongest recommendation."

ABOUT SUYATI

Suyati is a fast-growing, digital transformation solutions company that helps you rebuild your customer experience for the digital consumer. We collaborate with businesses to strategize and implement impactful digital initiatives that position our clients ahead of the competition. We are digital-first and we focus on delivering digital transformation solutions that support your various engagement strategies. With our niche and rich expertise in a wide range of technologies and services- CMS, CRM, e-commerce, Cloud, IoT, Data Analytics, and Product Engineering- we help companies leverage their best on web/cloud/mobile platforms.

We enable you to create insights driven customer engagement across all touch points to build a unified marketing approach. Our custom technology solutions have been deployed successfully in companies across the globe, especially in the US, UK, Europe and Australia.

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