

White Paper

Salesforce Customization and Cost Benefits that can
have a Scalable Impact on your Organization

Introduction:

As legacy CRM systems have grown obsolete, cloud-based and modern automation applications like Salesforce is letting organizations make the most of every business opportunity. Custom application development, coding to add robust features to your CRM platform or various third-party APP or API integrations, expands the scope of your business tasks that aren't attainable using many web-based CRMs in the market today. Your business processes might be based on a platform of your choice but your requirements are so unique that only deep level customization can meet those objectives. This is why you would need Salesforce and its Customization features to meet your business objective under the following circumstances:

- Third-Party integration is needed to execute your business process for better performance.
- Building custom API to allow other applications to consume data as well as expose necessary data.
- You need more reports and dashboards that are interactive and well-built to get the desired information.
- Modify Salesforce solution with custom development and UI enhancement tools using both Classic & Lightning Platforms.
- It is difficult for the end-users to adapt to a pre-configured platform.
- You have a budget and timeline set for customization to materialize.

ReliSource as your Salesforce Customization Consultant:

We at [ReliSource](#), are a Registered Consulting Partner of Salesforce and with 2 decades of experience working in multiple industry verticals and supporting our FORTUNE 50 clients as a one-stop technology partner. We are doing a lot of Custom App development, Service Integration and Customization on Salesforce. In general, we do a **cost optimization** of at least **30%** or more and with some of our customers we have seen a huge performance difference where they have increased their performance level of **Salesforce utilization** by **70%** due to our in-depth customization expertise.

Below are the 10 best practices that we utilize to ensure the successful deployment of a Customized Salesforce Solution for our clients:

1. **Working with a Certified Salesforce Expert:** We are a Registered Consulting Partner of Salesforce and we have Certified Salesforce Experts who know that a Salesforce deployment is so much more than just pushing configurations – it's more about modifying your data to ensure that you achieve optimal benefits from this incredibly customizable and powerful business tool. It might sound expensive at first, but it's not at all, as we will be working as an extension to your existing internal team as an external partner, with highly competitive hourly resource rates. You will be able to **save at least 40% of resource overhead costs** working with us as whilst achieving a significantly high ROI, as opposed to hiring an onsite consultant.

2. **Planning:** Great planning leads to great execution. ReliSource can help in defining the roadmap for you, starting from understanding your unique requirements in Salesforce platform, setting up a customization strategy to prioritize what customizations you are going to do and in what order, and prepare a deployment checklist before everything goes live. This will give you plenty of time to build and test different scenarios before initiating the actual deployment.
3. **Custom App Development:** Based on your unique customization needs, we can build a custom application for you. For example, for our financial services industry clients, we have developed Force.com based Custom Applications to automate business processes starting from Loan/Lease Processing, Credit Decision to Payments & Collections.
4. **API Integration:**
 - a. **Import (Consume):** We can import data from any other systems and add it to your internal system.
 - b. **Export (Expose):** If you want to share data with other parties or systems, we can create a custom API for you that will be exposed to 3rd party systems so that they can retrieve data from you.
5. **Salesforce Administration:** We can customize triggers and workflows for certain additional tasks that cannot be done automatically. Our team has hands on experience with Apex Triggers, Apex Classes, Visualforce Pages and Test Classes.
6. **Everything in a Sandbox (Check-Only Deployment):** A sandbox is a safe haven to build out and test applications without affecting a single other user or your live system. We will help you create the true replica of your production environment in a sandbox environment to make sure prior to deployment, any risk of potentially breaking your system without the ability to roll back, is mitigated.
7. **Thorough Testing:** Since everything will initially be on the sandbox for data safety and system security, our QA experts will ensure that before going to deployment, we have thoroughly tested and evaluated every single task including all the consistent updates to the sandbox. Then, we will run a final QA on the production environment as an added precaution. In some of our client cases, we ensured 90-100% test coverage even though Salesforce requirement is 75%.
8. **Maintaining Good Governance:** We strictly adhere to Salesforce Governor Limits. For example, when we are writing the code, we assure that we stay within the character limit and execution limit. Therefore, we write the code in a more optimized manner following the strict guidelines and make sure it's less costly as well.
9. **Reporting & Documenting Everything:** During any Salesforce customization projects, our team will keep a paper stream (release note) of your deployment by documenting everything from configuration and customization settings to test plan to training

materials for end users. This way a reliable point of reference is created for revisitation if any challenges are encountered during deployment.

10. **Version Control:** The more people involved in a development, the more likely that changes are accidentally overwritten. Fortunately, as a technology service provider ourselves, all our resources have good amount of experience in Version Control Systems. Our team will help you carefully document version changes and provide a copy of the entire repository at any time, using Version Control Systems tools such as Git, etc.



Conclusion:

After the completion of a successful customization project, you will be able to discover the immediate advantages:

- Improved Revenue
- Improve the ROI of Salesforce Implementation
- Optimize your platform's usability
- Integrate Salesforce with other systems you typically use
- Improved Analytics

Use Case:

Background: ReliSource worked with a leading Equipment Leasing company to integrate electronic signature to their loan approval process.

Objective:

- Sign Document electronically.
- Remove user dependency.

Task Details:

- Create and send agreements for signature directly from Salesforce.
- Customer can sign agreements and make payments from any devices.
- Track agreement status and write documents and data back into Salesforce.

Value Adds:

- Streamline document-driven processes across the entire organization.
- Instant visibility of document status & powerful reporting.
- Full digital audit trail for easy compliance and legal enforceability.

ReliSource Advantage:

- Mastery over the signature tool API and E-signature integration.

References:

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