

CASE STUDY

PROJECT

Salesforce Integration

The Challenge

Our client had a requirement in which he has to send a customized message, email and make a call to single or multiple Contacts and Leads Mobile Number, Email and Phone Number respectively through salesforce at the specified time by client. He wants to use One Call Now Notification System for this purpose.

The Solution

We have done integration with the One Call Now. We have created custom link button on detail page and List View of Contact and Lead which redirects to the custom Visual Force Page that have been designed to accept message to send, start and end time of sending message, etc. from the Client and send single or multiple message. We have also created an object that stores the message id and other details of the message like Delivery Status, Priority etc. to keep a track on sent message. An activity is also created as the contact or lead gets the sent message.

Results

- ✓ Client can send message, email or call to single or multiple Contact or Lead easily from their salesforce account using Once Call Now Notification System.
- ✓ They can send a customized message to their contacts and leads.
- ✓ They can keep track on the sent messages.
- ✓ An activity is created on that contact to which the message has been sent.

DropBox

Dropbox is a file hosting service operated by Dropbox, Inc., headquartered in San Francisco, California, that offers cloud storage, file synchronization, personal cloud, and client software. There are limits in storage of files in Salesforce. If you need a secure and free storage space for your files, you can use DropBox Lightning Component to store files directly in your DropBox app from Salesforce.

Quickbooks

[QuickBooks](#) is an accounting software package developed and marketed by Intuit. QuickBooks products are geared mainly toward small and medium-sized businesses and offer on-premises accounting applications as well as cloud based versions[2] that accept business payments, manage and pay bills, and payroll functions.

We have integrated with the invoicing and billing features of Quickbooks. We push the data stored in Salesforce to the create Invoices and bills to Quickbooks.

We have used the [Developer Documentation](#) provided by Quickbooks to integrate.

Salesforce Tooling and Metadata API

We have used Tooling API to build custom development tools. Tooling API's SOQL capabilities for many metadata types allow you to retrieve smaller pieces of metadata. Smaller retrieves improve performance, which makes Tooling API a better fit for developing interactive applications. For more details, you can click [here](#).

We can use Metadata API to retrieve, deploy, create, update or delete customization information, such as custom object definitions and page layouts, for your organization. This API is intended for managing customizations and for building tools that can manage the metadata model, not the data itself. To create, retrieve, update or delete records, such as accounts or leads, use data SOAP API or REST API. For more details, you can click [here](#).

We have used the Tooling API to get data that we cannot query from SOQL query like Debug logs. We can also modify some parts of Metadata through Tooling API. By using Metadata API, we have changed the Page Layout of any standard and custom objects from the code. Also we have implemented functionality to add or remove Record Types. We can create Apex classes, Visualforce Pages etc from the Metadata API.

Microsoft Projects

Microsoft Project is a [project management software](#) product, developed and sold by Microsoft. It is designed to assist a project manager in developing a plan, assigning resources to tasks, tracking progress, managing the budget, and analyzing workloads.

Microsoft Project was the company's third Microsoft Windows-based application, and within a couple of years of its introduction it became the dominant PC-based project management software.

It is part of the Microsoft Office family but has never been included in any of the Office suites. It is available currently in two editions, Standard and Professional. Microsoft Project's proprietary file format is .mpp.

We have parsed the file that Microsoft projects provides for the information about the Project, Milestone and Tasks. We have written custom code to parse the data of MPP file in Apex and create records for custom object of Project, Milestone and Task.

OneCallNow

[One Call Now](#) was created with goals of being always ready to become the industry standard in mass messaging services. Since then we've thrived because real people, organizations, and their leaders depend on us to simplify communications.

We use One Call Now for Emergency Notification System, Staffing, Routine Alerts, Customer Notification, Business Continuity and Employee Notification. We can send bulk messages, voice calls, IVR and emails using One Call Now.

We integrated with OneCallNow to send messages and make calls from salesforce.

Twilio

Twilio is a cloud communications platform as a service (PaaS) company based in San Francisco, California. Twilio allows software developers to programmatically make and receive phone calls and send and receive text messages using its web service APIs. Twilio's services are accessed over HTTP and are billed based on usage.

Quiktrak

Quiktrak is one of the leading asset verification, floorplan auditing, and risk management companies, providing audit and inspection services, as well as auditing technology to the global finance industry.

We integrated with Quiktrak to create Orders and change their status of the order and store the reports and photos for the order. We have also integrated Quiktrak to fetch the current status of the order and its reports and photos and we store them into salesforce attachments.

Setster

Setster allow customers to book appointments through your own website, your Setster profile page, or manually through your account dashboard. We can also sync with our existing Calendars. With Setster we can do a lot more than we can from any appointment scheduler app.

We integrated the Setster with salesforce to add any task or event to the setster system and to fetch data from their server to salesforce and store them in salesforce. We have used the [API Documentation](#) provided by Setster for integrating.

Secure Pay

Starting to accept online payments is quick and easy with [SecurePay](#) Online Payments.

This online payments solution combines the two essential elements you need to start selling online: an internet merchant account and a payment gateway.

We have integrated with SecurePay for our clients to receive payments successfully from SecurePay gateway. The payment types include Amex, Master Card, VISA, etc. We have used the API Documentation provided by SecurePay to integrate with the salesforce sites.