SALESFORCE DATA MIGRATION

DATA MIGRATION – FROM SQL TO FORCE.COM AND INTEGRATION

General Overview

K-Plus worked with a leading Real Estate Management Company operating with 80 offices throughout the US and Canada to helped develop an optimized solution for their CRM, Accounting, and Employee Data to create a seamless interface that would allow their data to be shared across the organization.

Our client implemented a team of consultants and programmers to facilitate the migration of Data from the various source systems into the new cloud-based platforms. This involved, cleansing data for accuracy, manipulating and condensing data in order to piece together the various source databases, As well as create a unique platform tailored to the needs of an ever-growing leader in the Real Estate industry both across the US and Canada.

K-Plus Role

K-Plus was brought into this project to facilitate the migration of data into APTO CRM system, and ensure its integration with Callidus and NetSuite. K-Plus was responsible for pulling all backend data from various Data sources and then running analysis to compile Data in SQL to allow loading into the Apto SOQL backend.

By using a series of SQL scripts we were able to manipulate large amounts of backend data to be prepared for upload to Apto. In the upload process K-Plus worked alongside Apto developers to integrate with NetSuite and Callidus using API triggers to successfully integrate between the systems.

K-Plus was able to provide excellent communication to both the client and the rest of the consulting team, using a combination of Jeera project management software, SourceTree for quality control of Scripts, and the Google Suite of products for quick communication across all organizations involved.

Challenges

K-Plus began by mapping the fields of the legacy system tables to the force.com platform. K-Plus was able to come up with creative solutions to overcome the inconsistencies in the fields between systems as well as general inaccuracies in the data itself to create a seamless user interface within the new system.

Outcome

K-Plus utilized a team of SQL Programmers, Project Managers, and Data Engineers to provide a very efficient migration while keeping the cost down to meet the clients project goals of moving to a cloud based solution in the force.com password.