A brief synopsis of salesforce.com projects

Following is a brief synopsis of some projects that Beyond Vision has done at salesforce.com platform.

- [FantasySalesTeam DataLink for Salesforce](#) appexchange
- [Jbilling.com](#) appexchange
- [Real Estate CRM Application with Geographic Intelligence - Waypoint Homes, LLC., California USA](#)
- [ERP – Financial Accounting App](#) appexchange
- [Salesforce Email Scheduling App](#) appexchange
- [Call Tracker App](#) appexchange
- [Salesforce.com to Google Contact and Calendar Sync App](#) appexchange
- [Salesforce-FedEx Integration Application with Chatter Feeds](#) appexchange
- [Salesforce-Xero Integration App](#) appexchange
- [Salesforce-GotoMeeting Integration App](#) appexchange
- [Membership Management System](#)
- [License Management App](#)
- [Subscription Management System](#)
- [Other Projects](#)

FantasySalesTeam DataLink for Salesforce appexchange
[(Appexchange URL)](#)

FantasySalesTeam is an award winning application which allows sales managers to run more engaging and higher performing sales contests through gamification. DataLink integrates FST with Salesforce; complete automation of scoring and game management.

This app is our featured work in terms of custom UI development using Visualforce and latest version of jQuery libraries. The development of this app features the most advanced Apex and Visualforce skills not commonly known to most of the developers. This includes usage of Apex Dynamic Component Injection in visualforce pages. This

technique allowed us to inject UI components for generating pages that allow creation of record filters with same look and feel as with standard Salesforce list filters. Team worked really hard to provide this kind of experience to users and enjoyed that too at the same time. The result was heaps of praise from both FantasySalesTeam's own team and users who used it. The core of this app lies in summarizing the data according the filters created, sending them to FantasySalesTeam servers in scheduled routines using SOAP API calls generated using WSDL-to-Apex classes tool. However, in order to minimize bandwidth usage for client having as many as 1500 users using this app, we revamped the app to use custom http calls with http compression to send compressed data to FantasySalesTeam servers bringing down bandwidth usage and response times considerably.

Key technical skills utilized in this project are: WSDL-To-Apex classes, Apex Controllers, Apex SObject Describe calls, Visualforce pages and components, Dynamic UI generation using Apex component injection and metadata describe calls, Apex Scheduled classes and Batch classes, some very neat abstractions for keeping model code separate between systems.

Goto Top

Salesforce.com jBilling Integration Connector App appexchange

JBilling.com selected us to develop their official plugin for Salesforce.com CRM. This plugin provides core functionality of their application right within Salesforce.com. We developed this app using their SOAP API. We paid a lot of attention to the application's architecture first up which enabled us to release the core app on time and made it extensible for adding further features over the period of time as requested by jBilling's executive team.

Since, jBilling.com provides hosted solution to their clients; we encountered and resolved several challenges to create a standard app that adapts to different customer configurations such as changing Endpoints, Server paths, Server Security issues, etc., without making any changes to core jBilling API. We designed this app keeping user-friendliness and robustness at heart of design. Due to these key design decisions, this is being tested in several customer organizations and proved to be a real time saver for customers using Salesforce.com and jBilling, who wanted to have a single UI for working through both systems right without leaving their favorite CRM system.

Key technical skills utilized in this project are: WSDL-To-Apex classes, Apex triggers, Apex Controllers, Visualforce pages and components, Apex Scheduled classes and Batch

classes, Abstractions for keeping Webservice model classes separate from Apex classes and SFDC database model for keeping them open for extension and closed to any major change in code due to Webservice class updates.

Real Estate CRM Application with Geographic Intelligence - Waypoint Homes, LLC, USA.

We are contracted by Waypoint Homes, LLC to customize Salesforce.com CRM for supporting their day-to-day business. Hence, we customized Salesforce.com with workflows, triggers, Apex and visualforce, and what-not to meet their requirement, which ultimately resulted in Salesforce.com becoming central hub for their backend office as well as their customer facing activities.

We started with bringing customer leads coming into Salesforce.com, then mapped their 4-step business model to salesforce.com which included property inspection, acquisition, renovation and disposition (renting out for a period) and then into cycle of renovation and disposition to other customers. At the end, we ended up designing a make-to-order real estate management app for them with state of art features such as:

1. Geographic Intelligence for automated scoring (portfolio, livability, etc) of properties within certain square miles
2. Binary search algorithms for intelligent property price calculations for buying properties at a price that coincides with their target revenue for years to come.
3. Desktop app for generating heat maps for pitching investors where they should invest according to statistical data on Return on Investment (ROI). Simple as it sounds; this app took considerable amount of time in designing custom algorithms and was core functionality for company's marketing and sales teams.

These features were developed by working with some of the best Geographic Intelligence scientists and top-notch financial analysts along with Waypoint Homes' own team of experts. It took best of Beyond Vision's team to develop these features considering strict governor limits that existed 2~3 years before and utilized, then cutting edge solutions, such as Scheduled and Batch Apex. We can say with some authority, we were among the first to utilize Salesforce.com to its utmost potential in that time and our team has every reason to take pride in that.

We also developed several customer facing portals for existing customers (tenants), investors and partners. One such portal was developed for show casing properties to

prospective customers using then recently released force.com sites feature. See
http://www.waypointhomes.com/

Key technical skills utilized in this project are: Google and MapQuest API for geocoding services, Apex Controllers, Apex SObject describe calls, Visualforce pages and components, Dynamic UI generation using Ape metadata describe calls for mapping fields on two closely matching objects, Apex Scheduled classes and Batch classes, some of the very best coding practices and mathematical computing for calculating target IRRs, finding properties within a region for geographic search algorithms, C# GDI+ development for generating custom overlays for Google Maps for creating heat maps with custom colors with complex business logic behind and website designing and development for their front end portal.

Goto Top

ERP – Financial Accounting App appexchange

A financial accounting application is developed within salesforce that works right from opportunities to quotes and SOPs to invoices & financial reporting. All ledger entries are posted via different standard modules like bank receipts, bank payments, customer receipts, supplier payments, customer refund, supplier refund, bank reconciliations, schedule recurring transactions etc. Reports like trial balance, profit & loss, balance sheet, aged debtors & payables, cash flow, VAT returns, stock and other management reports with executive dashboards are generated. Additional time sheet and expense sheet management modules are also developed as part of the application.

Beyond Vision is responsible for all phases involved in application design, development and deployment to AppExchange including Security Reviews clearance, LMO (License management org.) setup and all related tasks till listing on AppExchange.

Key technical skills utilized in this project are: Apex triggers, Apex Controllers, Visualforce pages and components, Custom Reports and Dashboards using Google Charts API.

Goto Top

Salesforce Email Scheduling App appexchange

We developed an Email Utility app for a client that enhances standard Salesforce.com email functionality by including facility to send scheduled emails. Emails are sent at

once on a scheduled time or it can be scheduled to be sent automatically on selected frequency.

The whole app experience is designed to be exactly same as SFDC email functionality for which extensive skills of Salesforce Meta-Data, JavaScript and jQuery is utilized. We also hacked into Salesforce.com's own JavaScript library and utilized same code to produce a very similar and efficient interface for our application. The recurrence logic is designed to give users a very flexible and powerful tool to automate their email tasks such as sending recurring invoices, notifications, etc. The app is particularly appreciated by marketing reps which missed the recurring campaign feature in Salesforce.

Key technical skills utilized in this project are: Parsing of Html and Text Email templates for rendering inline field values in "{!}" tags, Custom component development for providing users interface similar to SFDC Send Email page, Customized WYSIWYG editor development with back-end parsing, Visualforce, Apex, Scheduled and Batch Apex, JavaScript, jQuery, etc.

Goto Top

Call Tracker App appexchange (Appexchange URL)

We developed this app for Straightline Strategies, Inc. Call Tracker SF makes it EASY to generate call reports without expensive telephony integration. No power dialers, no VoiP connections, no hassles! Built in Lead and Contact reports measure calls to connects and connects to leads.

This simple and neat app allows Sales and Marketing reps to track call durations and aggregate them to a master activity record. This allows managers to view reports for number of calls and duration it took to convert a lead or win a customer. App involves development a visualforce page with neat use of jQuery component to provide timer functionality with notes and few other inputs. Just enough to get things done!

Key technical skills utilized in this project are: Apex Controllers, Visualforce pages, jQuery, Reports and Dashboards.

Goto Top

Salesforce.com to Google Contact and Calendar Sync App

appexchange

Beyond Vision developed this app for a leading app provider on Force.com platform. This project involved two applications one each for synchronizing Contacts and Calendar Events between Google Apps Calendar and Contacts. This app synchronized records in two-way sync. The AppExchange app allowed users to authenticate their Google accounts and configure what filtered sets of records they want to synchronize with Google. In Google, we used Groups and Calendar for marking which Contacts and Events need to be synchronized with Salesforce.com.

We developed as heterogeneous app with user controllable parts in Salesforce.com and core processing of app was developed on Dotcloud.com PHP Cloud stack. This was an exciting project and we are proud that team did a great job in learning a new platform in a very short period and produced high quality code for it. The dotlcoud stack hosted the background process and oAuth authentication token for communicating with both Salesforce.com Partner Webservice API and Google Rest APIs for Contacts and Calendar Sync.

Key technical skills utilized in this project are: Apex Controllers, Visualforce pages, Apex Batch jobs, Reports and Dashboards. PHP 5.3, NGINX server configuration for background processes, OAuth, Salesforce.com Partner API, Google REST APIs for Contact and Calendar, Redis NOSQL database.

Goto Top

Salesforce-FedEx Integration Application with Chatter Feeds

appexchange

A SF native app was developed to generate fedex labels directly from within the SF environment. Extensive web services integration is done with heavy visualForce development for providing the tiniest detail that FedEx API provides for customizing and generating the labels. Also, this app had background service developed in APEX which tracked package status and posted up-to-date status in users Chatter feed.

Key technical skills utilized in this project are: Visualforce, Apex, Triggers, FedEx Webservices, Scheduled and Batch Apex, Chatter Feed integration.

Goto Top

Salesforce-Xero Integration App appexchange

We recently developed an integration app that will be soon available on AppExchange for our partner in UK that integrates Xero Accounting Software in Salesforce.com. This app synchronizes in Contacts, Invoices, Credit Notes between Salesforce.com and Xero.

We developed API Integration with Xero Accounting System. The client had tried few other vendors before coming to us. The key challenges faced during the project was to get authentication working as it involved complex security certificate structure and to make this an AppExchange we need an authentication mechanism in our application that worked publicly and needed minimum technical knowledge from users. Once we got through it, we developed an extensible architecture for using Xero REST API that allowed us to extend app as it progressed.

Key technical skills utilized in this project are: Apex triggers, Apex Controllers, Visualforce pages and components, Scheduled Apex, Rest Webservice and JSON parsing

Goto Top

Salesforce-GotoMeeting Integration App appexchange

We have developed an app on Salesforce.com platform that enables user to create a meeting in Goto-Meeting, an online collaboration tool, right from Salesforce.com events screen. This application fetches the detail from related contact record and after creating a meeting in GotoMeeting, it sends user the invitation with appropriate settings selected by the Salesforce.com such as Voice options, Password options etc. This app is in security review and is soon to be launched on AppExchange.

This app uses Apex Trigger to synchronize meeting details to GotoMeeting and bring in generated meeting URL back to Salesforce. We have used OAuth and GotoMeeting Rest API for this app.

Key technical skills utilized in this project are: OAuth, Visualforce, Apex Classes, Apex Triggers, Rest Webservice, JSON parsing.

Goto Top

Membership Management System

A 'Financial Document Provider' company in UK required a single system to replace 5 discreet systems that they were using to do CRM, Permission-ing and Invoice generation. We did extensive customization in salesforce, created new objects and

developed new modules and visualforce pages to create a solution that handles creation of Groups, Accounts, Opportunities, Contracts, and Permissions on documents for contracts and its customized workflows. The system handles thousands of users and millions of documents. We transformed their 5 existing discreet systems into one unified entity, connected to their various online databases and systems with real time data sync.

This was Beyond Vision's first assignment after a recent release of Apex and Visualforce APIs for developers. We had experience in customizing Salesforce.com CRM before but mostly with point-and-click tools available. This meant our team had an up-hill task to learn the new APIs as well as provide a very robust environment for the customer to use Salesforce.com as their main back-end application, that too with a very limited learning resources and documentation available.

Key technical skills utilized in this project are: S-controls, Apex, Visualforce, ASP.Net, MS SQL Server, Data Analysis, Data Mining, and data migration.

License Management App

A visual effects software Development Company needed customization of salesforce to handle their complete business cycle from leads to opportunity to quote revisions and sales order to online license generation and maintenance of contracts with multiple level of access rights on users and data. We also did integration with ihance for emails management and adestra for online campaign management.

We did core development with Apex and Visualforce as well as integrated with other systems and legacy applications that client had been using for years. Result was seamless integration between many systems and customer had only Salesforce.com to update with major data and other systems reflected that automatically, thanks to tightly integrated background apps.

Key technical skills utilized in this project are: S-controls, Apex, Visualforce, Salesforce Territory Management, ASP.Net, MS SQL Server, Google APIs, Data Analysis, Data Mining, Data Migration, and Sage Accounts API

Subscription Management System

A leading document publishing company wants to migrate their existing CRM business to salesforce.com. They provide online and offline monthly subscriptions and sell various journals and books to end users. We are doing migration from Goldmine CRM to salesforce.com, document permission system, migration of existing Invoice generation system to SF and migration of existing campaign management system to SF.

Key technical skills utilized in this project are: S-controls, Apex, Visualforce, ASP.Net, MS SQL Server, Data Analysis, Data Mining, and Data Migration

Goto Top

Other Projects

Apart from these listed works, we have done several data migrations projects including migration to SFDC from SAGE Line 50, ACT, Microsoft Dynamics, Goldmine and several single and bi-directional integration between SFDC & SAGE, Xero, Google Calendar etc. We have also integrated various Wordpress, Drupal, Custom php, asp.net and cfm systems with salesforce.com utilizing their Webservice API (REST and SOAP).

We also have extensive experience in customizing Salesforce.com for small to large businesses. We have built custom database structures for storing business data, built workflows and approvals to support their day-to-day operations, created custom report types to give decision makers a neat view of their businesses as well bringing other systems to from right within Salesforce.com.

For more info on our clients/projects, please contact us at info@beyondvision.net

Note:
Beyond Vision is situated in South Asia and mainly into IT outsourcing and does development works for software houses and IT companies in the UK/USA and at Elance.

According to the nature of NDA signed between these partners, we are unable to disclose some client identities.

Goto Top