

A brief synopsis of salesforce.com projects

Following is a brief synopsis of projects that Beyond Vision has done at salesforce.com platform. Beyond Vision is situated in South Asia and mainly into IT outsourcing and does development works for software houses and IT companies mainly in the UK & USA.

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

Projects exceeding 2 months of development

- ERP – Financial Accounting App ~~appexchange~~
- Real Estate CRM Application with Geographic Intelligence - Waypoint Homes, LLC., California USA
- Salesforce-Xero Integration App ~~appexchange~~
- Salesforce-GotoMeeting Integration App ~~appexchange~~
- Salesforce-FedEx Integration Application with Chatter Feeds ~~appexchange~~
- Salesforce Email Scheduling App ~~appexchange~~
- Membership Management System
- License Management App
- Subscription Management System

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ERP – Financial Accounting App appexchange

A financial accounting application is developed within salesforce that works right from opportunities to quotes and SOPs to invoices. All ledger entries are posted via different standard accounts modules and reports like profit & loss, Debtors, cash flow, VAT returns, balance sheet, trial balance and other management reports 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.

Skills utilized: Visualforce, Apex, Triggers, Workflows and Approvals, API integration

Project Delivery: 6 months

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

We have done an implementation of geographic intelligence for identification of appropriate price of a target property.

This project's goal was to create an automated mechanism through which Wiel Brien can build geographic intelligence in to a centralized location, and then use that intelligence to effect buying decisions

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going forward. We implemented the nearest neighbor algorithm to achieve this requirement. We also developed a mobile application for their field agents so that they could use this functionality while they are on the move.

We also developed IRR function and did Binary search implementation within Salesforce to help Waypoint Homes ascertain appropriate buying and selling price for a property.

This project also involved development of a desktop utility app for analyzing geographic and financial data to produce multivariate heatmap on Google maps. This demographic was used by Waypoint Homes to show investors up-to-date statistics about utilization of their funds.

Skills utilized: Visualforce, Apex, Triggers, Google Maps API, MapQuest API, MS Visual C#, Salesforce Webservices API

Project Delivery: 4 months (Ongoing)

Salesforce-Xero Integration App

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. Beyond Vision is responsible for all phases involved in application design, development and deployment to AppExchange including Security Reviews

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clearance, LMO (License management org.) setup and all related tasks till the app is successfully listed on AppExchange.

Skills utilized: Visualforce, Apex Classes, Apex Triggers, Scheduled Apex, Rest Webservice, JSON parsing.

Project Delivery: 2 month

Salesforce-GotoMeeting Integration App appexchange

We have developed an app on Salesforce.com platform that enables user to create a meeting in GotoMeeting, 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.

Skills utilized: Visualforce, Apex Classes, Apex Triggers, Rest Webservice, JSON parsing.

Project Delivery: 2 month

Salesforce-FedEx Integration Application with Chatter Feeds appexchange

A SF native app is developed to generate fedex labels directly from within the SF environment. Extensive web services integration is done with heavy visualForce development. Also, this app had background service developed in APEX which tracked package status and posted up-to-date status in users chatter feed.

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Skills utilized: Visualforce, Apex, Triggers, FedEx Webservices, Scheduled and Batch Apex

Project Delivery: 9 weeks

Salesforce Email Scheduling App appexchange

We developed an Email Utility app for a client (NDA-signed) 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. 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 the app is successfully listed on AppExchange.

Skills utilized: Visualforce, Apex, Scheduled and Batch Apex, JavaScript, jQuery

Project Delivery: 3 months

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

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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.

Skills utilized: S-controls, Apex, Visualforce, ASP.Net, MS SQL Server, Data Analysis, Data Mining, and Data Migration

Project Delivery: 8 months

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.

Skills utilized: S-controls, Apex, Visualforce, Salesforce Territory Management, ASP.Net, MS SQL Server, Google APIs, Data Analysis, Data Mining, Data Migration, and Sage Accounts API

Project Delivery: 6 weeks

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.

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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.

Skills utilized: S-controls, Apex, Visualforce, ASP.Net, MS SQL Server, Data Analysis, Data Mining, and Data Migration

Project Delivery: 6 months (ongoing)

Projects with less than 2 months of development

Custom Calendar

jQuery calendar with same UI as SFDC Event Calendar for displaying events through custom logic.

Skills utilized: Visualforce, Apex, jQuery

Project Delivery: 2 weeks

Data Migration from Sage Act

Customization in Opportunity module and data migration from Sage Act.

Skills utilized: Visualforce, Apex, SControls

Project Delivery: 4 weeks

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Data migration from Microsoft Dynamics

Migrated data from Accounts, Contacts, Activities

Skills utilized: Data analysis, Data Mining, MS SQL server

Project Delivery: 2 weeks

SF Sage Integration

Invoice creation in Sage Accounts based on Opportunity stages. Provided this same solution to 5 more clients.

Skills utilized: Visualforce, Apex, Salesforce webservice API and Sage API Integration.

Project Delivery: 2 weeks

Real Estate Website development on force.com Sites

We did their corporate website on Force.com sites.

We also created an interactive salesforce application for their internal use. The purpose of this application was to give their users the ability to quickly identify the properties based on certain filters. Then the users could take a look at that property on the google map to identify its location, distance from other properties nearby, see the actual property street view and know the directions to that property. These tasks were achieved by doing integration with google maps street view API and directions API. We are currently working on a functionality that will allow them to evenly assign leads to all of their agents based

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upon the zip codes and areas that they deal in.

Skills utilized: Visualforce, Apex, Force.com Sites, Google Maps API connectivity, jQuery, Workflow and Approvals

Project Delivery: 2 weeks

Time Tracker App

Time tracker application Salesforce platform

Skills utilized: Visualforce, Apex

Project Delivery: 2 weeks

Membership System

We developed a membership management system for Australian retail business association featuring automatic subscription renewal reminders and membership tracking over period of time using background scheduled services. Reminder emails are sent with PDF attachments. Also allows admin to enter payments for subscription renewals.

Skills utilized: Visualforce, Apex, Triggers, Scheduled services, Salesforce Javascript AJAX API.

Project Delivery: 6 weeks