

# VSO

VOLUNTARY SERVICE OVERSEAS

## CASE STUDY

## Salesforce Administrator Services

- Sales & Service Cloud Configuration
- Sales & Service Cloud Customization
- User Management
- Data Security Management



## CUSTOMER

VSO

## ENGAGEMENT MODEL

Dedicated offshore support

## SUPPORT SINCE

2017

## BUSINESS NEED

- To provide Admin services for Custom Application software built on Force.com
- Provisioning users in the Application with appropriate roles, hierarchies and permissions
- Import data into the Salesforce Application from other systems
- Secured access to data for Salesforce users and Guest users
- Ensuring GDPR compliance
- Regular refresh of the lower environment sandboxes
- Validating security alerts and critical updates from Salesforce in the Application
- Salesforce Data back up and restoration
- Object Level configurations – Objects, tab, views, fields, page lay outs, record types
- Salesforce Built In Automation – formula fields, validations, work flow rules

## TENTH PLANET'S PROCESS

- All the Salesforce Admin requests are logged in using Remedy force
- E Mail / skype for business / Mittel phone are the tools used for receiving the request

- Requests are categorized based on severity and impact
- Response time, resolution time defined for all the Admin requests
- Triaging the request to the appropriate support group based on request type
- Updated Knowledge base article in share point for the various requests
- For queries on critical updates, raise a ticket with Salesforce support and follow up until resolution
- Approval and control procedures for deploying a change from lower to higher environment
- Deployment windows defined during off peak business hours and during week end
- End user training for quicker adaption and usability of the system

## BUSINESS OUTCOMES AFTER IMPLEMENTATION

- The client's Application platform is kept up to date, secured and **more productive**
- More **business processes are automated** using built in tools of Salesforce
- Optimal usage of **Salesforce licensing** due to streamlined process of user provisioning
- **Secured access of data** to guest users
- Data more **streamlined** in the Salesforce application
- **Integrity of Data** with other software applications
- **Improved Compliance** with Salesforce recommended best practices