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Business | Technology | Strategy

Infowise Ultimate Forms Practice Development - Case Study

Advisory

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Case Study - Web2All - Sending a form for insert/update details

Executive summary

Digital transformation is an approach that many companies have adapted or founded. As part of digitizing every process, one of the most important is to automate customers' inputs into business processes - to engage with customers seamlessly .

Customer - Hope to Work

Hope to work is a Manpower company that utilized the Salesforce community for freelancers (resellers/recruiters) to apply candidates for Job offers that are posted on a daily basis. Their candidates go through a structured process of Profile submitting with CVs, interviews and employers' acceptance.
Hope to Work develop smart mechanisms that help freelancers with matching candidates to a Job offer on the candidate page based on one of a kind algorithm.

Challenge

Customer uses a custom object for pre-lead capturing and tracking activities prior to lead generation. Web2CustomObject can be achieved through an API or a community page, meaning developing via declarative tool or Apex add deployment and testing - mini project on your Salesforce environment.

Solution

Posting the form on Company Website/Portal - Form can be created for both Standard and custom objects.

Tip - Internal processes require customers' (external) input for a full lifecycle, giving access to the system is not an option. Salesforce best practices approach is to create a dedicated page in the experience cloud (aka community cloud) and manage user provisioning for 'Register Community' to protect your data. On top of user provisioning, each community external user has its own cost per Salesforce subscription price (Per Login / User).

Providing Online forms with merged fields from specific records in salesforce helps admins to create data and relations easily.

Case Study Description

Capturing leads on custom objects - pre-work to be captured prior to lead creation.

Industries - All

More Use Cases Examples

- Custom Web2Lead/Case to replace OOTB per to limitation on other non supporting features (ie attachments)
- Finance/Insurance - Opening a bank account or Filling insurance details are the central part of these industries - customer onboarding.
- Reporting project hrs for resources without a Salesforce user - Many companies do not want to purchase for each project resources a full internal/external user and prefer to report the hours on their behalf.

Case Study Implementation

- Connect Salesforce Organization to Infowise App
- Generate a form by Form Designer under sandbox
  - Select relevant fields
  - Define rules - I added the record Source rule
  - Hide fields if needed
- Test on preview mode
- Define access control
- Set your form on a test web page (landing page,3rd party website)
  - With captcha
- Test it on development environment
- Export form
- Create new organization for production
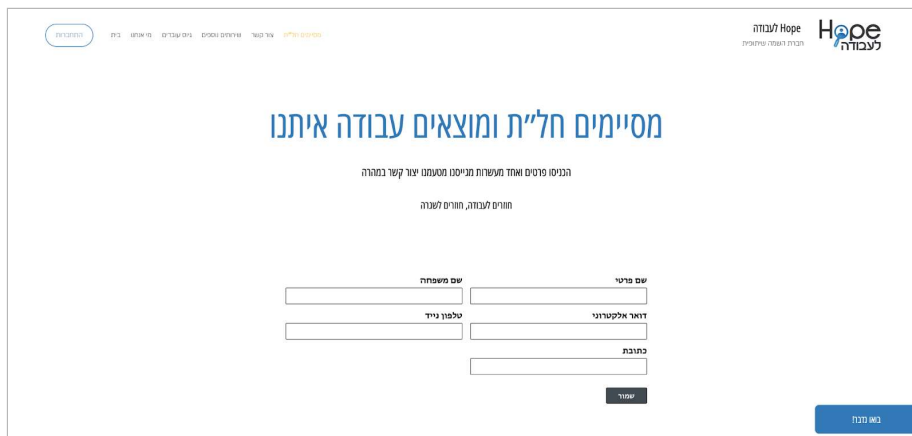 - Connect org
- Import Form

- Set your form on a web page

Benefit

- Not one line code had been written
- Plug and play tool
- Less in half a day with testing and it is up and running
  - Can be temp or all time solution

Results

Nice embedded form on customer website with hidden parameters and no code needed. There are few nice templates and CSS can be override