

Enabling the Idea Component in Salesforce Lightning for a Leading IT Provider

HIGHLIGHTS



Customized UI
for Ideas



Enabled Ideas
in LEX



Prioritized Idea
Development



Revenue Generation
with Ideas

THE CUSTOMER

An information technology company, the customer enables IT professionals to back-up, manage, and extract insights from data across systems and cloud providers. They develop software that is used to consolidate and simplify data management, as well as analytics capabilities. The software enables businesses to resolve issues such as mass data fragmentation.

THE CONTEXT

The customer was finding it difficult to modify the fields and UI of the idea component in Salesforce Classic, as well as their community. With time, internal users began switching from Classic, and Salesforce was not providing support for ideas in Lightning. Therefore, they wanted to build a UI for internal users in Lightning Experience. In addition to this, they wanted to prioritize ideas based on revenue, using metrics from associated accounts and opportunities.

THE OBJECTIVE

The customer's objective was threefold. First, to be able to modify the idea component of their Salesforce community. Second, to be able to implement ideas in Lightning Experience. Third, to prioritize idea development on the basis of associated revenue.

THE SOLUTION

In order to enable the customer to achieve these objectives, Team Grazitti:

- Developed the idea component for their community
- Built a configurations page to enable them to manage ideas
- Set up new filters, as well as the search option
- Built the UI for users in Lightning Experience
- Enabled them to prioritize the development of ideas with higher associated revenue by assigning them to product managers

THE OUTCOME

The customer is now able to manage idea 'features' from one location, i.e. the configurations page. They are able to link ideas to opportunities and accounts, which has enabled them to calculate the revenue they would generate if they worked on a particular idea. In essence, they have successfully implemented the idea component in Lightning Experience.

