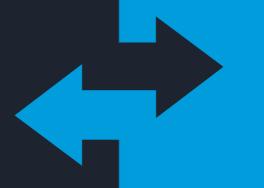


BUILDING A TWO WAY INTEGRATION PLATFORM OF

WORDPRESS TO SALESFORCE AND VICE VERSA



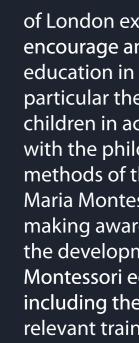


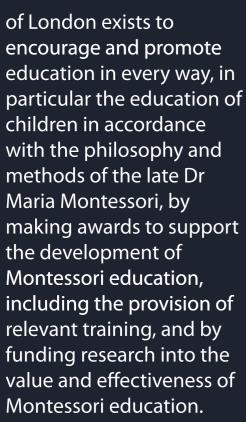
salesforce



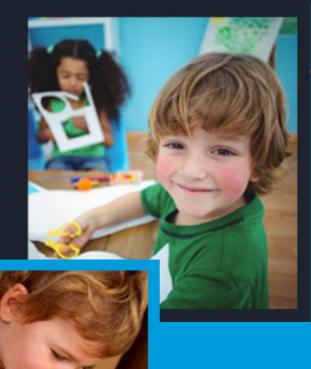


Our Customer, Montessori St. Nicholas









What bothered them



- ✓ The client was using an IT system on the WordPress end which had the scattered data all over in the Schools, Woo Commerce, and User Sections.
- The data was needed to be stored according to the Proper Memberships and Orders, which would likely to help in finding and Managing the data at any given time.
- Again, another critical requirement is Managing the MSA Registrations data of the Users and Schools as there was no any common section at the WordPress end to show the entire data at the glance.
- ✓ There was no any unique identifier of the user for their Members.

What we did



- ✓ During the entire design and development process, Aress focus was to build a robust solution, that is simple to operate by resources with low IT exposure, and has fast maneuverability with minimum clicks. We developed a simple interface with minimal need of inputs.
- ✓ Identifying the each and every record is done much simplified by assigning/ generating unique "email Id" with the creation of the Account according to the different record types viz. Individuals/Organizations.
- Proper display of the inventory and sales of products in the tabular format with accurate data and figures and also showing the having its 2-Way integrations with the WordPress End.
- ✓ Provided the entire of the school, the description of the Order and the user's information in one section named as "MSA Registrations". This helps in the managing the school data, Track of the active membership of the User/School.
- ✓ The entire implementation process was conducted in an Iterative and Agile execution method. There were intermediate checkpoints through a show and tell session, to capture user feedback.
- ✓ For the WordPress Section, an add-on functionality was provided to the Client, regarding the Changing the Role of the user i.e. "Free User" to "Individual" or "Small School" to "Large School". This Functionality was not available in the Standard WordPress Plugin.
- ✓ For the Phase-2 of the Montessori, the client requested an additional two fields to be mapped in the Individual Membership paid by Employer.
- ✓ We also enabled the working of the "Free User" same as that of the "Individual Account" for its Method of Shopping, only the Free User has no MSA Registration.

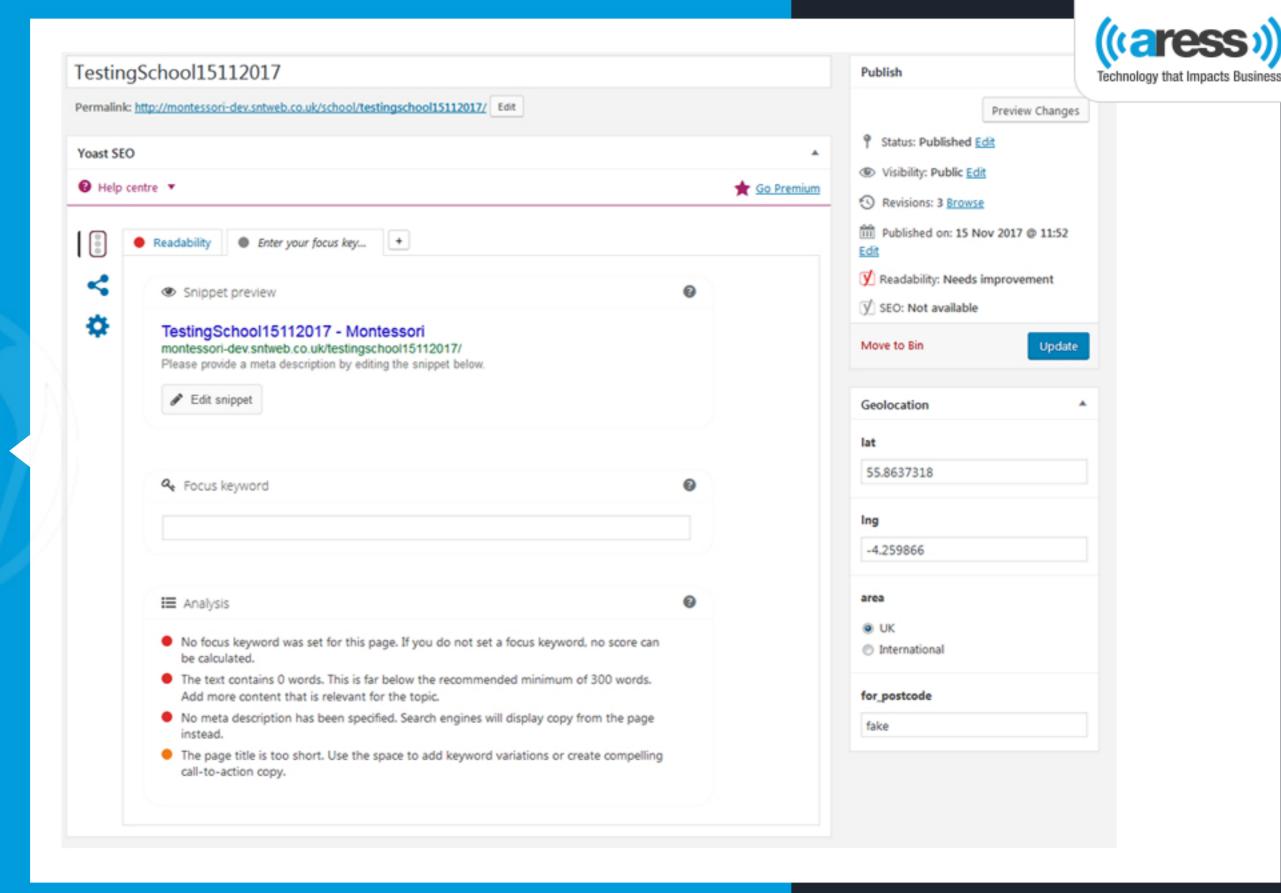
The Value we offered

- The simple interface made for all different types of users who could use the system more efficiently. This resulted in faster operation, a lesser challenge in staffing by leveraging cross staffing and deploying semi-skilled staffs.
- 2-Way integration of almost all the fields so as to maintain the consistency of the Data on WordPress and Salesforce End.
- Proper mapping and Updating of the records in the respective sections of the User, Schools, Order to its corresponding MSA Registration, Account and Orders in the Salesforce.
- Products with their Standard Price List are mapped to the Order for identifying its inventory and Stocks.



Some of the Screen shots for the Points Mentioned Above -

School Section on the WordPress End



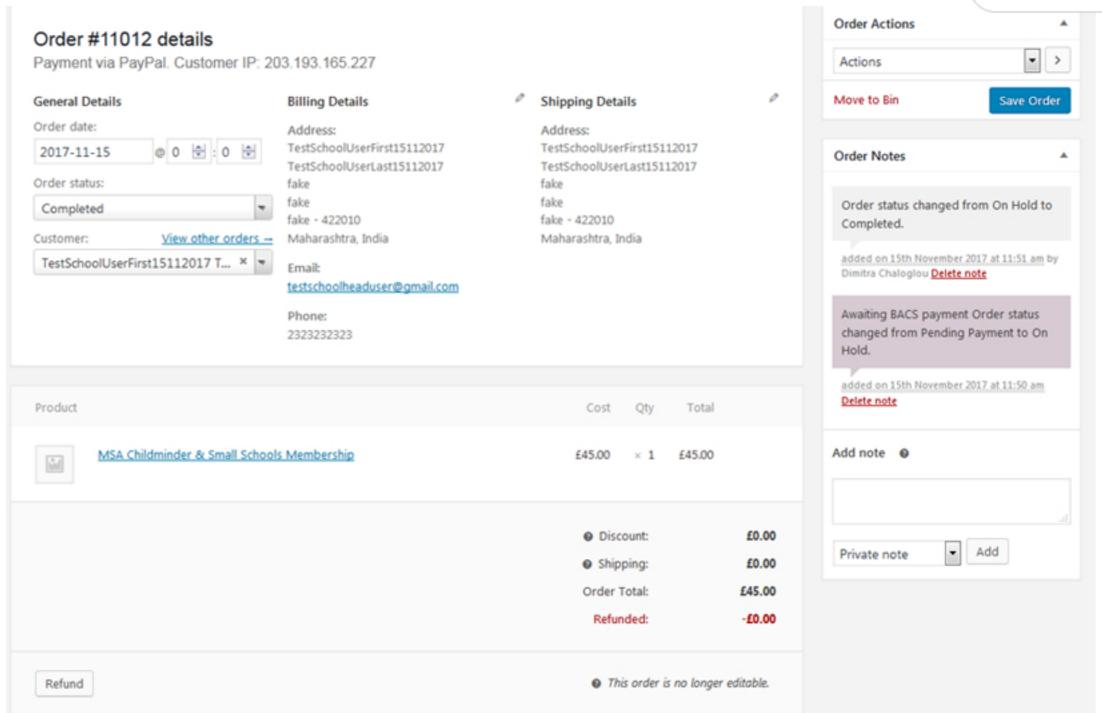


User Section at the WordPress end

Username	TestSchoolHead	Usernames cannot be changed.
Role	Childminders & Small Schools (MSA)	
First Name	TestSchoolUserFirst15112017	
Last Name	TestSchoolUserLast15112017	
Nickname (required)	TestSchoolHead	
Display name publicly as	TestSchoolUserFirst15112017 ▼	
Contact Info		
Email (required)	TestSchoolHeadUser@gmail.com	
Website	http://TestingSchool15112017.com	



Order Section at the WordPress End





Account section at the Salesforce end where "email" is the unique identifier.

Account Information			
Account Owner	Aress Software [Change]	Account Number	
Account Name	Testchool24112017 [View Hierarchy]	Account Record Type	Organisations
Parent Account		Annual Revenue	
Account Source		Description	
Method of Payment	Direct Bank Transfer		
Additional Info			
SIC Description		Fax	
Туре		Phone	74569841230
Industry		Other Phone Number	987456250
Employees		Email	testchool24112017@gmail.com
		Website	
		Rating	

MSA Registration at the Salesforce end where we get a glance of all the data i.e. Membership, order and School information.



▼ Registration Details

▼ Registration Details			lechnology ti
MSA Registrations Number	Test1389	Region	The North
User approved	Yes	Membership role	Childminders & Small School (MEAB)
Registered On	24/11/2017	User/School	Testchool24112017
Name of Current Employer (School)			
School Paying			
▼ Membership Order and Subscription	on Details		
Order	00000535	Order#	11,060
Order Status	Completed	Order On	24/11/2017
Subscription#	11,061	Subscription Billing Period	Year
Subscription Status	Active	Subscription Started On	24/11/2017
Subscription Payment Method	Direct Bank Transfer	End Date	
▼ School Details		Subscription Total	£35
School Head Title	Mr		
Head First name	TestUserschool24112017HL		
Head Surname	TestUserschool24112017HL		
School Email	testchool24112017@gmail.com		
School Phone Number	745632210		
Correspondence Country	United Kingdom (UK)		
School Website			
Correspondence Address			
Correspondence Town			
Correspondence Postcode			
Correspondence County			
Correspondence Address 2			
Date of last ofsted inspection	07/11/2017		
Grade of last ofsted inspection	ok		

Product section at the Salesforce end mapped with unique Product code to find its inventory.

Product Name	Product Code	Product Description	Last Modified Date	Amount Remaining
<u>newProduct</u>	10986		02/11/2017	10
testProduct3	10982		02/11/2017	5
testProduct2	10981	Testing from the WP to SF	02/11/2017	10
test from SF to WP2	10978	Testing Twice	02/11/2017	0
test from SF to WP	10977	testing syncing of the product from the SF to WP	02/11/2017	0



Product section at the WordPress end.

Product Data — Simple pr	roduct	Virtual: Downloadable: Ticket:	
	Regular price (£)	25	
Inventory	Sale price (£)		<u>Schedule</u>
Shipping			
Linked Products	Tax status	Taxable ▼	•
Attributes	Tax class	Standard	•
❖ Advanced	Subscription Type	Link the subscription to the package (renev ▼	•
	Resume posting limit	Jnlimited	•
	Resume listing duration	<u>*</u>	•
	Feature Listings?	Feature this resume - it will be styled differently	and sticky.