

Keste Solves Complexities and Eliminates Manual Processes

Automate the Upload of Excel Data to Salesforce

Salesforce offers many integration options to sync data between a Salesforce instance and other business applications. However, companies still find it challenging to successfully integrate Salesforce with Microsoft Excel.

Finance teams love the flexibility and speed of Microsoft Excel, but there are risks when it comes time to import that data from the spreadsheet to Salesforce. Data synchronization usually involves the time consuming effort of manual data entry. And with manual data entry, comes errors...at an average rate of 10.23 errors per 30 sheets of data (Source: UNLV, 2009).

BACKGROUND

One of Keste's clients — an existing Salesforce customer — was facing this exact predicament, due to a lack of an Excel/Salesforce integration solution.

Keste's consultants analyzed their current business processes and identified numerous pain points that impacted efficiency and accuracy when users attempted to import Excel forms into Salesforce. These users had to manually populate Salesforce data fields — one-by-one — from individual cells within the Excel "inspection forms" (see figure 1).

Questions	Answer	Comments
1. Desired square footage?	2000 sq. ft.	
2. Garage required?	Yes	
3. How many stories?	2	
4. How many bedrooms?	3	
5. How many bathrooms?	3	

Figure 1

Each Excel inspection form contained 10 tabs. This combined with labelling inconsistencies between questions (i.e. cell labels) on the Excel forms and field labels in the Salesforce record meant that it took approximately 30 minutes per tab to enter data manually. With an estimated 20 forms a month, that equated to 100 hours a month in data entry time.

This time consuming process created more human errors and resulted in users taking more time to resolve data inconsistency issues.



It costs \$1 to verify the accuracy of data at the point of entry, \$10 to correct or clean up data in batch form, and \$100 (or more) per record if nothing is done....



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KESTE SOLUTION

Keste proposed a two-part solution to enhance the client's existing business process.

First, Keste modified the user interface (UI) to make the data field labels on Salesforce easier to match to questions / cell labels on the Excel forms.

On top of this enhancement, a numbering protocol was added to both Salesforce data fields and Excel questions/ cell labels to further distinguish which question is related to which field (see figure 2).

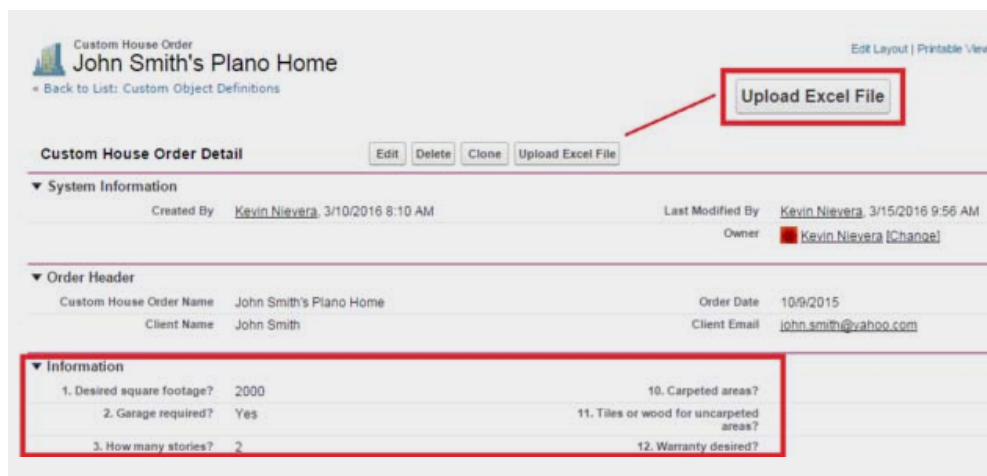


Figure 2

Secondly, Keste automated the manual process that the users endured to populate the Salesforce records. Keste developed a custom framework to process this Excel data by utilizing a Salesforce feature called "Custom Settings".

This framework allows data to be imported from various Excel forms simply by clicking an "Upload Excel File" button on the Salesforce record and choosing a file to upload (see figure 2).

When this "Upload Excel File" button is clicked, it redirects the user to a Visualforce page (see figure 3) where the user is prompted to choose a file for importing.

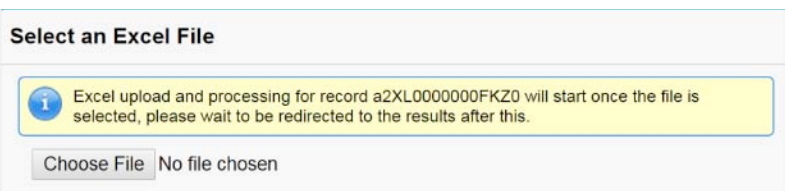


Figure 3

Once a file is chosen, the appropriate fields within Salesforce are automatically populated. At completion, the user is automatically redirected to the newly populated Salesforce record page.

Custom Settings is a feature within Salesforce that allows an administrator to manipulate code behavior through UI changes without needing to rely on a development team.

BENEFITS

This configurable framework now provides a uniform, consistent layout between the Excel forms and the Salesforce layout pages, allowing the data to automatically flow from the Excel spreadsheets.

The client benefits from increased efficiency and accuracy in the data entry process. A process that used to take 30 minutes to transfer one Excel tab of data to a Salesforce record was reduced to mere seconds.



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