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Migration from standard Salesforce flows to Lightning:

✓ **Customer Profile:** A leading publisher of newspapers, selling 10.4 million newspapers each week and distributing an additional 6.7 million commuter and community titles.

✓ **Process prior to Lightning Migration:**

A) Subscription Process

This process contained 5-6 different screens in which Agents had to

- select appropriate product/rate codes/payment terms
- enter customer details
- verify address details
- enter payment related information &
- review confirmation screen summary with all details.

Using real time integration, all the subscription details were sent to Customer's system where Subscription was getting placed.

B) Updating Payment Details

This process contained 3-4 different screens in which Agents had to

- select Payment terms (Fixed/Auto Renew)
- select Payment type (Credit/Debit)
- enter payment information (i.e. Credit card/Bank account details etc.) &
- review confirmation screen summary with all details.

Using real time integration, all the payment related details were sent to Customer's system



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C) Making a payment

This process contained 3-4 different screens in which Agents had to

- select Payment terms (Fixed/Auto Renew)
- select Payment type (Credit/Debit)
- enter payment information (i.e. Credit card/Bank account details etc.) &
- review confirmation screen summary with all details.

Using real time integration, all the payment related details were sent to payment gateway & Customer's back end system.

Following are the gains for the customer from implementing Lightning for above processes:

- 1) **Quicker Processes:** The previous processes were designed using native Salesforce flows & agents had to navigate through multiple screens to complete all steps. For example, in Subscription process, Agent used to select product type and then on next screen, they would get list of all products. After selection of product, they would have to click next to select rate code & payment terms on next screen. In the overall process, Agent had to navigate 10-12 different screens to complete process. Using lightning framework, user experience is enhanced as the entire process can be completed in only 5 screens.
- 2) **Easier Data Validation:** In flows, data validation like credit card number, phone number, email was happening on click of next button, whereas in Lightning, such validation errors are thrown on entering values and not on click of buttons.
- 3) **Easy Navigation:** Using the navigation component in Lightning, agents can easily switch to any screen during the process.



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4) **Repeatable Components:** Many common components like navigation bar, credit card, debit card, summary components were created once & those were used in all 3 processes using Lightning framework. In future, same can be leveraged in other processes as well. This saves time for developers to configure the system.

Following are few screenshots of these processes:

The screenshot shows the 'New Subscription' process in the 'Rate Code Selection' step. The breadcrumb trail is 'Cases > Details > New Subscription'. The 'SIGN UP FLOW' progress bar shows five steps: MASTHEAD SELECTION, CUSTOMER INFORMATION, CUSTOMER ADDRESS, CONFIRMATION AND TS & CS, and RECURRING PAYMENT DETAILS, with the current step being Rate Code Selection. The 'Customer Name' is 'FirstNameDarsh LastNameTest'. The 'Rate Code Selection' section includes search filters for Masthead, Product Type, Delivery Schedule, and Pricebook. Below the filters, there are four rate code options, each with a dropdown arrow: '\$1.44 per Week - PDMG Normal 1.45 PI - PDMG_Normal145PI - Pay As You Go', '\$1.44 per Week - PDMGaz Normal Thu \$1.45 - PDMG_NORMAL - Pay As You Go', '\$2.5 per Week - foxsports.com.au Digital Subscription - Default - NP_FS_SDOPO414|379 - Pay As You Go', and '\$5 per Week - foxsports.com.au Digital Subscription - Full - NP_FS_SDOPO414|398 - Pay As You Go'. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible in the top right.

The screenshot shows the 'New Subscription' process in the 'Customer Information' step. The breadcrumb trail is 'Cases > Details > New Subscription'. The 'SIGN UP FLOW' progress bar shows five steps: MASTHEAD SELECTION, CUSTOMER INFORMATION, CUSTOMER ADDRESS, CONFIRMATION AND TS & CS, and RECURRING PAYMENT DETAILS, with the current step being Customer Information. The 'Customer Name' is 'FirstNameDarsh LastNameTest' and the 'Subscription' is 'PDMGAZ|PRINT|XXXXTHXX'. The 'Customer Information' section includes a message 'Please enter information before proceeding.' and various input fields: Title (Dr.), First Name (FirstNameDarsh), Last Name (LastNameTest), Email Address (df2b9287c0@test.com), Year of Birth, Home Phone (+61 01 33333333), Fax (+61 02 12), Mobile Phone (+61 0987654321), Work Phone (+61 05 44444444), International Number (+235689), Preferred Phone (Home), and Communication Preference (Email). A checkbox for 'Bypass last name validation' is also present. A validation error message 'Invalid Fax; Please enter a valid 2 digit area code.' is displayed below the Fax field. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible in the top right.



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Cases 02177209 02177237 +

Details New Subscription +

Customer Name: FirstNameDarsh LastNameTest
Subscription: PDMGAZ|PRINT|XXXXTHXX

MASTHEAD SELECTION CUSTOMER INFORMATION CUSTOMER ADDRESS CONFIRMATION AND TS & CS RECURRING PAYMENT DETAILS COMPLETE SIGN UP

Rate Code Selection

Search Filters

Mathead: [Dropdown]
Product Type: Digital, Print, Bundle
Delivery Schedule: Any
Pricebook: Marketing Preferred

Pricebook Selection

- Test Sldharth Pricebook
- UNIVERSITY
- Outbound Sales
- Marketing Preferred
- TEACHER
- CVM Price Book
- Limited Restricted Offers
- Save the Sale

OK

Rate Code Selection

Please select a rate code to narrow the available rate codes.

\$1.44 per Week - PDMGaz Normal Thu \$1.45 - PDMG_NORMAL
\$2.5 per Week - foxsports.com.au Digital Subscription - Default - NP_FS_SDOP0414|379 - Pay As You Go
\$5 per Week - foxsports.com.au Digital Subscription - Full - NP_FS_SDOP0414|398 - Pay As You Go

Details New Subscription +

Confirmation of Sign Up

Customer Information

Title Dr.
First Name FirstNameDarsh
Last Name LastNameTest
Home Phone +61133333333
Fax
Mobile +61987654321
Work Phone +61544444444
International Number +235689
Preferred Phone Home
Email df2b9287c0@test.com
Year of Birth
Communication Preference Email

New Subscription Information

Selected Offer \$1.44 per Week - PDMG Normal 1.45 PI - PDMG_Normal145PI - Pay As You Go
Requested Subscription Start Date 11/09/2017

Terms and Conditions

Must Mentions

Your offer is \$1.44 per week, \$7.20 billed 5 Weekly. Your subscription will cease at the end of 5 Weeks
We or you can cancel your subscription at any time. You will get a pro rata refund for any unexpired period.

Privacy Policy and Spam Act

Please play the customer the Privacy Policy from the softphone toolbar.

Customer Acknowledgement

Customer Agrees to Must Mentions?
 Customer Agrees to Privacy Policy?
 Customer Agrees to receiving Marketing Comms?

I can opt you out of marketing communications by:

- Email
- Phone Calls
- Mail to registered postal address
- SMS/MMS
- Targeted Online Advertising
- Opt Out Of All Mastheads

However we may still contact you to provide you with necessary information about the services we are supplying to you.

History

Details New Subscription +

SIGN UP FLOW
New Subscription

Customer Name: FirstNameDarsh LastNameTest
Subscription: PDMGAZ|PRINT|XXXXTHXX

Previous Next Cancel

MASTHEAD SELECTION CUSTOMER INFORMATION CUSTOMER ADDRESS CONFIRMATION AND TS & CS RECURRING PAYMENT DETAILS COMPLETE SIGN UP



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Cases 02177209 02177237 +

Details New Subscription +

New Subscription Previous Submit Cancel

Customer Name Subscription
FirstNameDarsh LastNameTest PDMGAZ|PRINT|XXXXTHXX

MASTHEAD SELECTION CUSTOMER INFORMATION CUSTOMER ADDRESS CONFIRMATION AND TS & CS RECURRING PAYMENT DETAILS COMPLETE SIGN UP

Read timed out

Direct Debit/Credit Card Information

Collect credit card information for automatic deductions.

* Card Holder
test

* Card Number
5123456789012345

VISA MASTERCARD AMEX

* CVV2
087

History

Cases 02177209 02177237 +

Details New Subscription +

New Subscription Previous Next Cancel

Customer Name Subscription
FirstNameDarsh LastNameTest PDMGAZ|PRINT|XXXXTHXX

MASTHEAD SELECTION CUSTOMER INFORMATION CUSTOMER ADDRESS CONFIRMATION AND TS & CS RECURRING PAYMENT DETAILS COMPLETE SIGN UP

Rate Code Selection

Search Filters

Product Type
Digital, Print, Bundle

Delivery Schedule
Any

Pricebook
Marketing Preferred

Rate Code Selection

Please select from the following Rate Codes. If the rate code you are looking for is not listed, use the filters on the left to narrow the available rate codes.

\$1.44 per Week - PDMG Normal 1.45 PI - PDMG_Normal145PI - Pay As You Go	\$1.44 per Week - PDMGaz Normal Thu \$1.45 - PDMG_NORMAL - Pay As You Go
\$2.5 per Week - foxsports.com.au Digital Subscription - Default - NP_ES_SDOPO4141379 - Pay As You Go	\$5 per Week - foxsports.com.au Digital Subscription - Full - NP_ES_SDOPO4141398 - Pay As You Go