



YES CRM Consultants

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 YES CRM system. The current step is 'Rate Code Selection'. The process flow is: MASTHEAD SELECTION, CUSTOMER INFORMATION, CUSTOMER ADDRESS, CONFIRMATION AND TS & CS, RECURRING PAYMENT DETAILS, COMPLETE SIGN UP. The 'Rate Code Selection' section includes search filters for Masthead, Product Type, Delivery Schedule, and Pricebook. The main area displays four rate code options for selection:

- \$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_SDOP0414379 - Pay As You Go
- \$5 per Week - foxsports.com.au Digital Subscription - Full - NP_FS_SDOP0414398 - Pay As You Go

The screenshot shows the 'New Subscription' process in the YES CRM system, specifically the 'Customer Information' step. The process flow is: MASTHEAD SELECTION, CUSTOMER INFORMATION, CUSTOMER ADDRESS, CONFIRMATION AND TS & CS, RECURRING PAYMENT DETAILS, COMPLETE SIGN UP. The 'Customer Information' section includes the following fields:

- *Title: Dr.
- First Name: FirstNameDarsh
- * Last Name: LastNameTest
- * Email Address: df2b9287c0@test.com
- Year of Birth: [Empty]
- * Home Phone: +61 01 33333333
- Fax: +61 02 12 (Invalid Fax; Please enter a valid 2 digit area code)
- Mobile Phone: +61 0987654321
- Work Phone: +61 05 44444444
- International Number: +235689
- * Preferred Phone: Home
- * Communication Preference: Email



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Cases 02177209 02177237 +

Details New Subscription +

Customer Name: First Name: Darsh, Last Name: Test
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

Mathhead: [Empty]

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

\$1.4 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: First Name: Darsh
Last Name: Last Name: Test
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 P1 - PDMG_Normal145P1 - 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: First Name: Darsh, Last Name: Test
Subscription: PDMGAZ|PRINT|XXXXTHXX

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

Previous Next Cancel



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Details New Subscription +

New Subscription Previous Submit Cancel

Customer Name: FirstNameDarsh LastNameTest
Subscription: 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 Submit Cancel

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

- Masthead
- Product Type: Digital, Print, Bundle
- Delivery Schedule: Any
- Pricedbook: 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_FS_SDOPO414 379 - Pay As You Go	\$5 per Week - foxsports.com.au Digital Subscription - Full - NP_FS_SDOPO414 398 - Pay As You Go