![Passage Technology logo]

MAKING SALESFORCE® DATA WORK FOR YOU

From analytics, to project management or admin & developer tools, we can address your pain points.

www.passagetechnology.com

Let's Get Started > >

Soaring above the cloud

To stay ahead, Admins and Developers need to be innovative, remain agile, and anticipate change.

Packed with tips and recommendations for pain points, this guide helps you better leverage your Salesforce data.

See how Passage Technology's apps and development services can work for your challenges and use cases.

PAIN POINT #1

Spending too much time coding? Tired of tracking down data?

We get it.

We have the perfect solution. **Rollup Helper** is an accelerator for your admins, business analysts, and developers—no coding required. You'll get actionable, real-time information on your page layouts and save time. It's easy to create custom rollup filters and segment your data to fit your needs, whether they are simple or complex. Rollup Helper doesn't require a Master/Detail relationship between objects, so roll-up summary fields in Salesforce are hassle-free.

Read more.

RollupHelper

"We can use this product in place of adding overly customized fields or automation to our system and it is all done in an easy place...This is a great product and saved our small admin team a ton of time we didn't have. We can get the functionality we need in a few easy steps versus hours of development time."
 - Lindsey Hohengarten, Vector Solutions

"Only tool that I've found that addresses the roll up limitations associated with Advanced Currency Management. It is also so much more. We can drive deeper, giving richer, more meaningful information to our users now."
 - Jeff Hemming, Sourced Group

"By using Rollup Helper, we've made workflows automatic and tied to bill due dates. This ensures we're accurate and quick in managing our invoices. It also eliminates the need to have separate bookkeeping for various groups and tasks."
 - Dorian Sabitov, Salesforce Admin, Developer and Consultant for Mobilunity

"We probably have a dozen different separate rollups pulling in information from the daily stats that are identifying risks, use cases, and looking for specific product features. We basically consider our customers activated based on the features Rollup Helper is pulling in from what we call the "daily stats object" into the account."
 - Sloan Morris, AskNicely

QUICK TIP
You can identify the primary contact's email address or other contact information and have it accessible for a workflow. Check out the use case.

PAIN POINT #2

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Looking for hassle-free Salesforce project management?

You've found it.

Let's start by saying goodbye to those spreadsheets. Meet **Milestones PM+**, a cross-industry, native, project and process management solution for Salesforce. Milestones PM+ gives you complete org access for unlimited users. You get instant 360-degree visibility to projects, tasks, programs, milestones, time, risks and issues, and resources in your CRM.

Read more.

MilestonesPM+

"Before installing, our systems group would use a myriad of excel spreadsheets to track projects... We are now thankful for having a complete solution to track our work and provide great looking data to our business teams."
 - *Christina Moore, Procter & Gamble*

"Using Milestones PM+ has increased the functionality of our Implementation teams substantially...The App itself is great. Beautiful Gantt Chart, Easy Project creation, Monitoring tasks are great. We originally were tempted to go with the unmanaged package but went with the managed PM+ instead because of the increase in functionality...Both my business analyst and I ...trained our teams with no issues."
 - *Daniel Barckley, SourceMed*

"We chose Milestones PM+ as it had a low effort to entry, and our Salesforce Build consultant (who was familiar with our requirements) showed how it fit the bill, without having to do a lot of configuration or customization."
 - *Los Angeles Transportation Agency*

QUICK TIP

Use the Milestones PM+ template functionality to automatically create projects within Salesforce to increase efficiency, productivity, and consistency with all types of business processes. Check out the use case.

PAIN POINT #3

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Wish lookup fields would auto-populate?

Your wish just came true.

Like magic, **Lookup Helper** allows you to auto-populate lookups using record matching rules, group data by time period or geography, and it works with standard and custom objects. You can automatically create new data records. You'll spend less time clicking around to find information. Instead, it can be accessed in one click or a hover-over, rather than hunting for that "one report."

Read more.

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LookupHelper

"I installed Lookup Helper today and it is working awesome. I am very pleased with how easy the tool is to use and the support provided. They walked me through step-by-step setup and we had the tool installed and working as intended in less than an hour. Very much recommend!"
 - Colin McGettigan, Tristate Capital Bank

"Whether the need is a one-time heavy-lift (ie: an activity merge) or an operational efficiency, Lookup Helper is one Swiss Army Knife for data that every Salesforce Admin should have in their toolbox."
 - Robert Dolber, American Portfolios

QUICK TIP
When you have multi-level account hierarchies, you can have all child accounts directly related to the top level account. Check out the use case.

PAIN POINT #4

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Is your Salesforce data reaching storage limits?

We can help you declutter.

Data happens. **Storage Helpe**r safely mass deletes data for any standard or custom object(s) and helps you save money on Salesforce Data Storage. Designed to help protect your data, Storage Helper allows you to preview your records first, then backs up all of the Salesforce records that it deletes to a .csv file before the deletion occurs.

Read more.

StorageHelper

"Salesforce storage is quite expensive and I just saved my client $13,000/year by not upgrading the storage for Salesforce. Instead, we implemented purge rules to delete unusable data records. Storage Helper is a great investment and worth the time to explore how to reduce your costs!"
 - Cricket Noyes, Stratify Consulting

"Storage Helper has been hugely beneficial in keeping our org under our storage limits by automating the deletion of older, unused records. The customizable storage use threshold and email alerts are a bonus too! Now we don't have to remember to manually check if we're getting close to our limit; Storage Helper pushes the notification to us. I also like the reports & charts that give a good overview of where your storage is being allocated."
 - Jennifer West, Buildium

"Storage Helper can help you keep track of your data limits and, more importantly, automate deletion of records to keep you within the set limits. For those of us who have to regularly clean out old records (especially campaign member status records maybe??), this could be very helpful."
 - Phil Walton, Salesforce MVP

QUICK TIP
You can mass delete old emails, auto-responses and case email messages. Check out the use case.

PAIN POINT #5

Need your team to be on the same page with priorities?

Be the ultimate team player.

Prioritization Helper can help your team reach a consensus, or prioritize their objectives in order of importance, while also understanding how a decision was made. You can prioritize records in any Object in Salesforce without coding, and decision makers can collaborate while reducing cognitive biases using the Analytic Hierarchy Process (AHP). Go team.

Read more.

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Prioritization Helper

"This tool has been great for helping our team members with their high caseloads—pretty simple to set up on the back end. Now my users can look at a report of all of their cases and see which ones management deems to be most urgent according to the data we chose. We are already thinking of several other use cases that this tool can help us with."
 - Sydney Scott, UValle Law Firm

QUICK TIP

When you need help figuring out how you're going to accomplish your tasks, try using the Eisenhower matrix (also referred to as Eisenhower's box, method, or quadrant). Check out the use case.

PAIN POINT #6

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Tired of dealing with invalid or duplicate data?

With a few clicks, you can get cleaner data.

Now you can go beyond Salesforce default limitations. With **Data Quality Helper**, Salesforce users are notified when bad data is entered based on criteria chosen by Admins. This ensures users are entering or updating complete, correct, and non-duplicative data each time. Plus, with hard or soft Customizable Data Validation Rules, you can create reminders and warnings for users, which are displayed when an Admin's set of criteria is met while a user creates/updates or views a record. Mic drop.

Read more.

Find and fix duplicate records

With Data Quality Helper, users can easily resolve duplicates for Accounts, Contacts, Cases, Leads, Products, Opportunities, Projects, Orders, Contracts, Activities, Campaigns, Individuals, or any other standard or custom Object. Check out the use cases.

Ensure required info is gathered in the proper format

Salesforce default functionality only allows hard validation rules—if records are not properly created/updated, save/submit is prevented. Data Quality Helper's functionality, which includes soft validation and regex pattern recognition, gives Admins more flexibility to design unique validation rules. Check out the use cases.

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QUICK TIP

Find and fix duplicate records in Salesforce. Check out the use cases.

PAIN POINT #7

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Implementing Salesforce with scattered, decentralized data, and no Admin to help?

No Admin? No problem!

Passage Technology's **Development Services** team will make your Salesforce implementation as painless and seamless as possible. Whether your data is in Salesforce, Excel or multiple locations, we'll clean up/improve data quality, ensuring it stays in sync via automation or notification. Passage Technology offers custom Salesforce solutions and Salesforce consulting services to businesses around the globe.

Read more.

"Passage Technology was a great partner for us while working to decommission over a dozen systems and migrate the functionality to a single Salesforce application...The level of detail and attention Passage resources and developers provided the business teams was highly appreciated. The innovative solutions to contradicting requirements and validations allowed for all stakeholders to be pleased with the system and without Passage, we would have encountered a governance nightmare. We appreciate the team and all the work they put on the project and as a result our organization benefits from a single source."
 - Healthcare client

"We've integrated several dozen systems and apps, and currently we're focusing on our Lightning conversion. Passage Technology's Development Services team developed multiple email-to-case solutions for us, and that has been a huge efficiency win for our internal departments and customers. We've been able to provide high-value integration solutions and valuable support through Passage Technology's resources. They always deliver high-quality, consistent results; they are an excellent partner who has helped us meet our corporate goals. Bottom line: the relationship is a win-win!"
 - Carrie French, Uniti Fiber

QUICK TIP
See how Passage Technology's Development Services team helped Uniti Fiber integrate multiple companies' historical data and systems into one corporate Salesforce org. Check out their success story.

READY TO EXPLORE MORE APPS AND SOLUTIONS?

Passage Technology is an authorized Salesforce Consulting Partner, AppExchange Partner, and Reseller Partner, giving us the greatest breadth of capability in the ecosystem of partners to deliver on your mission critical needs. To learn more, visit our website or contact us.

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