ADvendio Ad Manager Implementation and
Salesforce Customization

Project Overview

The project involved analysis, design, and development of custom business requirements. This included recording and scheduling 'ad-serving contracts' into Salesforce before being updated into ADvendio object schema. We also configured and customized 'ADvendio managed package' (advertisement specs) on the client's Salesforce environment. The solution simplified advertisement inventory management and enabled the sales team to make informed business decisions.

Client Profile

Founded in 1972, the client is a pioneer in the mail-order catalog business and a key resource for design engineers. The company offers the world's largest selection of electronic components in stock that is available for immediate shipment.

Business Requirement

Implementation of Ad Manager using ADvendio managed package, a leading advertising business solution powered by Salesforce. The solution would enable management of business processes end-to-end with one system that comprises CRM, sales, order management, reporting, billing, and accounting.

Key Challenges

- Customization of large sets of data before establishing collaboration with objects of ADvendio package

- Configuring and customizing ADvendio so that it works with the schedule items data

- Data validation and import to the org

- Automation of supplier notification email for qualified schedules

- Generation of fully customized proposals and invoices in PDF format

QBurst Solution

- Implemented a custom object to hold schedule data and opened up connections with ADvendio schema (via ADvendio support) to enable the Salesforce object to collaborate with ADvendio objects such as Media Basket

- Implemented a granular search option for schedule items with 12 filters that populate data dynamically from stored records

- Created a custom page for ADvendio ADSpec search with three filters that populate data dynamically from stored records

- Implemented a batch job on qualified schedules to relay notification emails with a link to a force.com site where suppliers can view the forms and fill ad related data

- Custom Visualforce pages and controllers were developed to include the custom proposal and invoice formats (rendered as PDFs) generated via the ADvendio invoice engine

- Auto population of account-related data for media campaign, campaign item, and schedule item is implemented using a process builder

- ADvendio configuration and customizations to meet daily transactions

- Enabled 'Managed Package's Ad Manager' for ad management including client's schedule data to be used along with the Ad Manager functionalities

- Automated notification of ad material data which eliminated manual follow up with external suppliers

- Optimized 'custom search' feature which made the cumbersome process of identifying schedule records easier and faster

Tools and Technologies

- Force.com

- Salesforce platform configurations

- Apex customization (for controllers, schedulers, and batch classes)

- Visualforce pages/templates

- SOQL

- HTML

- CSS

Business Benefits

- 45% reduction in advertising transaction management costs

- Increased effectiveness while delivering cross-media campaigns

- Multi-layered approach for comprehensive Salesforce security, keeping both incorporated data and key functionalities protected from attack