CapStorm

Incremental Integration with Regulated Salesforce Data

State Agency supporting Children, Families, & Communities

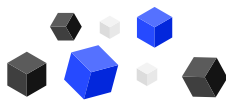**A complex Salesforce implementation with over 2,000 custom objects.**

This agency protects the state's most innocent citizens with services supporting children and families. While many similar agencies in other states are operating on antiquated systems, even with manual paper records, this technology driven group adopted Salesforce in order to streamline operations and best support citizens. Fulfilling the agency's mission requires a veritable mountain of documentation, and it was no easy task to transition from a legacy system into Salesforce.

Industry
> Public Sector

Company
> Size 1,000+

Specialities
> Behavioral Health
> Intervention
> Public Safety

Tech Stack
> Tableau
> On-Premise Hosting
> Oracle

Problem

A complex Salesforce environment with daily deployments and rising data volumes required an integration solution that scaled.

The agency had three key objectives for a solution: (1) protect both the data and metadata of the Salesforce organization against accidental loss or corruption, (2) cleanse sensitive data prior to integration with Salesforce Einstein, and (3) enhance reporting with complex analysis that could not be performed natively in Salesforce. As an added complexity, the data stored in this Salesforce organization is highly sensitive, containing PII for thousands of citizens along with documentation required by both state judicial and federal government.

Solution

1. **Incremental Schema & Metadata**
   CopyStorm dynamically mirrored the Salesforces schema in the agencys Oracle database. This replication creates an exact copy of the underlying Salesforce database with object names mapping directly to table names in the database.

2. **Secure Salesforce Data Extract**
   The agency owns to the relational database where the Salesforce data extract is stored. This incremental replication picks up added or modified records with each scheduled run and gives the agency full control over data access and security.

3. **Data Staging & Analysis**
   The database created and maintained by CopyStorm fulfills several key functions in addition to a Salesforce disaster recovery solution.

Outcome

Reduced risk with a secure Salesforce data and metadata backup strategy.

Increased data insights with the ability to integrate into any out-of-the box reporting solution.

Improved efficiency with a set-it-and-forget-it solution that automatically keeps an Oracle database in step with the current state of Salesforce.