



Systems Maintenance & Integration RFP Q & A

The following are answers to questions Brand USA has received to the RFP Updated Material Request for Systems Maintenance & Integration.

Q: According to the Q&A document, it is our understanding that you currently use Cvent and that it is currently connected to Salesforce via the API. With this in mind, it is not clear as to whether you want a project plan to implementation Cvent or support to manage best practices and more specific training use cases? Are you using the Cvent connector or a 3rd party connector like Jitterbit or Workato? Is the data being synced one way or bi-directional? How frequently is the data being passed...real-time, near-time, daily, nightly? What do you mean by reviews and approvals?

A: Cvent is currently connected to Salesforce via the API, but we do not have any graphical user interface to interact with. We would like to know how you have created an integration with Cvent in Salesforce and any screenshots of that implementation. We are using the Cvent connector and the sync is currently one way (Cvent to Salesforce). Data is only passed when an event is created on the Cvent website. Reviews and approvals are meant for the time to add to your project plan for Brand USA to review the different phases of the implementation and the approval to move forward with what is built out.

Q: In terms of Training materials and documents, is it possible for you to elaborate further on what might satisfy this request? All our training sessions are unique to a client's business use cases and designed to specifically show them how they will use the solution(s) to manage their business requirements.

A. Training materials and documents are any manuals you have created for your implementations and any documentation you include for maintaining/troubleshooting the custom code.

Q: What is the current architecture of Brand USA's Salesforce environment? Can you send an ERD?

A: ERD is not available.

Q: Can you provide a screenshot from your current Salesforce instance? - Installed Packages - Storage Usage

A: Installed packages consist of Box, Conga, Currencies on Demand, and DocuSign.

A: Current storage is approximately 175MB.

Q: Is your Cvent implementation currently integrated with Salesforce in any way?

A: Cvent is connected to Salesforce via the API application.

Q: Do you currently have any integration between your FMS and Salesforce? If so, please provide details on frequency and directionality.

A. Salesforce is integrated with the FMS. The FMS pushes data to Salesforce every fifteen minutes.

Q: Is your MailChimp account currently integrated with Salesforce? If so, what tool are you using for the integration?

A. Yes, however, MailChimp is not actively being used in Salesforce.

Q: What functionality are you looking to develop via Lightning Components?

A. We are looking to upgrade our instance to Lightning. This will require transitioning our current Visualforce pages to the Lightning Component Framework.

