

# MINUTES OF MEETING (MOM)

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| **Date** | **Time** | **Venue** |
| 26-05-2025 | 06:01 AM |  |

## Participant List

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| **Sr.** | **Name** | **Role/Dept** |
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## Summary

The meeting covered detailed discussions on Salesforce integration with J5, including account creation, data synchronization, duplicate checks, inquiry and order processing, template management, API development, and organizational structure. Key decisions included defining mandatory fields for account and inquiry data, establishing API protocols with authentication, and planning for future phases involving financial and order details. Action items involve finalizing data structures, API endpoints, and template formats, as well as scheduling further technical discussions with relevant teams. Challenges identified include data duplication control, template customization, and system attribute mapping. Followup items include sharing data templates, API specifications, and organizational structure details for review and implementation.

| **Sr. No.** | **Discussion Point** | **Challenges / Decisions / Outcome / Actions to be taken** | **Owner/ Due Date/ Status** |
| --- | --- | --- | --- |
| 1 | Salesforce account creation and status management | Decisions Made : Temporary accounts are created in Salesforce until customer ID is received from customer master., Account status is determined by the presence of customer ID in the account record.  Action Items : Implement logic to check if account record has customer ID to determine permanence., Create weekly list view for accounts not yet synced with customer master.  Existing Challenges : Ensuring accurate synchronization between Salesforce and customer master., Avoiding confusion between temporary and permanent accounts.  Follow Up Items : Finalize data fields for account creation., Develop process for weekly account status review. |  |
| 2 | Inquiry and opportunity data flow | Decisions Made : Inquiry data from J5 will be pushed into Salesforce as opportunity records., Inquiry ID from J5 will be mapped to Salesforce opportunity for tracking.  Action Items : Define mandatory fields for inquiry data in Salesforce., Establish process for mapping inquiry IDs and related data.  Existing Challenges : Mapping inquiry data accurately to avoid data mismatch., Handling multiple inquiry types and their attributes.  Follow Up Items : Create inquiry table structure in J5., Coordinate with sales team to finalize inquiry data requirements. |  |
| 3 | Template management and API development | Decisions Made : Standard and customized templates will be used for quotations, with specific fields for product and customer data., APIs will be developed with JWT authentication for data exchange between Salesforce and J5.  Action Items : Define JSON structure for quotation templates., Develop and test REST API endpoints for data transfer.  Existing Challenges : Creating flexible templates for diverse customer requirements., Ensuring secure and reliable API communication.  Follow Up Items : Share API specifications and sample data structures., Schedule API testing sessions with development teams. |  |
| 4 | Order and financial data integration | Decisions Made : Order data will be captured from J5 and sent to Salesforce, including job details and revenue., Financial details like credit limits and outstanding payments will be handled in phase two.  Action Items : Define order data structure and trigger points for synchronization., Plan for capturing order-related expenses and revenue separately.  Existing Challenges : Handling complex order structures with multiple jobs and billing units., Aligning order data with sales and financial reporting needs.  Follow Up Items : Finalize order data fields and process flow., Discuss detailed order reporting requirements with sales and finance teams. |  |
| 5 | Organizational structure and sales hierarchy | Decisions Made : Sales organization is not based on product or region but is a flat structure., Multiple salespersons can be linked to a single customer for different products.  Action Items : Share sales organization structure with relevant teams., Define process for linking multiple salespersons to a customer.  Existing Challenges : Mapping sales organization to system attributes., Managing multiple salespersons per customer efficiently.  Follow Up Items : Obtain detailed sales organization hierarchy from sales management., Implement linking logic in CRM system. |  |