Overcoming an Obstacle Using Creativity

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15th January 2025

I was asked to create an activity log that would seamlessly sync information between our intranet and Salesforce, which is the CRM we rely on. This meant that any interactions recorded under a specific lead, project, or opportunity in Salesforce would need to appear automatically on our intranet—and the same updates applied on the intranet would have to reflect back in Salesforce. It sounded straightforward at first, but I quickly discovered that Salesforce's API is notoriously tricky, and it wasn't just a matter of pulling data in and out. I needed to do in-depth joins and mapping across multiple tables to ensure that data didn't get mixed up, which added a new layer of complexity to the project.

Initially, I felt a bit overwhelmed by all the moving parts and extensive documentation, but I was determined to see it through. My first step was to do a deep dive into Salesforce's developer resources and consult with the few Salesforce experts within the company. I realised that tackling such a complex API would mean I had to test each part of the sync separately. Rather than building it all at once, I broke the process down into more manageable sections—one for authenticating with Salesforce, another for querying and mapping the various objects, and another for pushing everything back into our intranet. While this approach took more time upfront, it helped me spot any issues early on.

Through a series of trial-and-error sessions, I managed to design a system where data on leads and opportunities seamlessly flows between Salesforce and the intranet. At one point, I spent hours poring over error logs to see why certain activities weren't syncing, only to discover that a single field in Salesforce had a slightly different naming convention than expected. It was frustrating, but it taught me to pay closer attention to the details. Each time I hit a roadblock, I adjusted my approach and consulted my colleagues for any insights they had. That spirit of collaboration and willingness to learn turned out to be the key ingredient in making the project a success.

In the end, the new activity log has saved our team countless hours of manual data entry and eliminated a lot of confusion about where information truly 'lived.' Whenever a new phone call, meeting, or email is logged in Salesforce, it shows up on our intranet almost immediately. Likewise, if an update is applied to the intranet, it syncs back to Salesforce, ensuring that everyone sees the same information in real time. It was gratifying to watch people's expressions when they first realised how streamlined the process had become, especially because I remember the days when they had to jump between multiple systems, duplicating effort at every turn.

Looking back, I can see how this project highlighted the importance of thorough research, creative problem-solving, and perseverance. I learned that it's not enough to rely on a single resource or approach when dealing with a complex system like Salesforce. Sometimes, you have to read all the documentation, ask for help, experiment with different solutions, and remain patient even when you feel like you're going in circles. That determination to stick with the project, paired with a bit of creativity in how I handled the data sync, ultimately led to a better final product. It's an experience I'll carry with me into any future role, knowing that there's always a way to solve a tough problem if you're willing to keep exploring new angles.