



STREAMLINING USER MANAGEMENT FOR SCALABLE FUND ADMINISTRATION WITH SALESFORCE

DATAMATICS

The client, a prominent Fund Administrator services company that has been guiding investors and investees through the intricacies of fund management—understood this all too well. At the same time, they faced a challenge that was quietly slowing them down.

The Challenge: Manual Processes, Disconnected Systems, and Delayed Actions

The client's user management process was manual and time-consuming. End users had no straightforward way to update their account or contact details to Salesforce via separate UI forms. Also, there was no streamlined approval mechanism in place. This meant sensitive data was handled inefficiently, and the potential for error was overlooked.

The Client knew they needed a change, and that's when they approached the Dextara Datamatics team.

The Solution: Reimagining User Management with Salesforce Integration

The client envisioned a more intelligent system with a user-friendly interface where access was controlled with precision. Most importantly, they wanted to make their data management agile and secure without compromising user experience.

- The Dextara Datamatics team started by implementing multiple custom REST APIs to communicate/pass the data to Salesforce, making data agile between systems.
- We implemented a robust approval process to authorize users to access/update their details based on assigned contact roles to ensure the right people had the proper access.
- Next, we introduced the Queues object to enable authorized users to access/update their accounts and contacts based on a set of permissions and approvals, making data not just agile—but incredibly secure.
- The fundamental transformation happened when we integrated Salesforce with another Salesforce org, which served as middleware and powered a frontend Angular app. This connected the client with over 300 individual orgs, creating a massive, unified, and scalable ecosystem.

Impact: Empowering Trust, Speed, and Scale

Seamless User Autonomy

End-users can securely update their details without manual support

Enhanced Data Security & Compliance

Role-based access and approvals ensure compliant, precise data handling

Accelerated Operations

Automated workflows reduced delays and improved turnaround time

Scalability for Growth

Integration across 300+ orgs enables unified, future-ready operations

ABOUT **DATAMATICS**

Datamatics enables enterprises to go Deep in Digital to boost their productivity, customer experience, and competitive advantage. Datamatics' portfolio spans across three pillars of Digital Technologies, Digital Operations, and Digital Experiences. It has established products in Intelligent Document Processing, Robotic Process Automation, AI/ML models, Smart Workflows, Business Intelligence, and Automatic Fare Collection.

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