

How the National Lottery Heritage Fund Seamlessly Integrated Salesforce and SharePoint

| NATIONAL LOTTERY HERITAGE
FUND SUCCESS STORY



The Connecting Software solution seemed more cost-effective to us. We had more control.”

TIM ISAACS
TECHNICAL PROJECT
MANAGER

Customer

The National Lottery
Heritage Fund

Country

United Kingdom

Activity

Government Entity

Product

Document Extractor built
for Salesforce Platform™

Success Story

How the National Lottery Heritage Fund Seamlessly Integrated Salesforce and SharePoint

The National Lottery Heritage Fund is the UK's largest dedicated heritage funder. They distribute National Lottery grants from £10,000 to £10 million to fund projects that sustain and transform the UK's heritage. They are also major advocates for the value of heritage.

The Challenge

The Heritage Fund faced a daunting task. They needed to migrate a massive number of documents from Salesforce to SharePoint.

But let's go back and start this story from the very beginning. It all began with two million documents extracted from an old grant management system. The next step was to refine what documents were actually needed. The number went down to approximately 1.5 million after applying retention rules. At this point, these documents were stored in a single SharePoint repository but with limited structure and multiple metadata issues.

In the first stage, all these documents had to move to Salesforce and be linked to adequate Salesforce objects. However, the IT team knew the number and size of documents would cause trouble in terms of Salesforce storage, so they needed to get them out of Salesforce but in a way that the users could still find them in the

expected Salesforce object or through a regular Salesforce search.

While SharePoint was always the target platform, primarily because the Heritage Fund mostly uses the Microsoft ecosystem, Tim Isaacs, technical project manager, noted another critical reason. He said, *"If, in the future, there was a need to migrate away from Salesforce to another platform, the Heritage Fund won't have to worry about the documents because the documents are all filed and nicely done in SharePoint. One less headache."*

The Solution: Document Extractor

The search for a solution led to analysing solutions that somehow integrated Salesforce with SharePoint. Document Extractor stood out as the one that most closely did what they were looking for, so they started with a trial.

The trial was successful because it met the previously set criteria: there would be no changes to the Salesforce experience, and users wouldn't need to interact with it. Nonetheless, an unexpected issue was uncovered: Transferring and linking files from the repository to specific Salesforce

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records was difficult due to the large volume of files.

For this, the Connecting Software custom development team was involved. It was established that this custom migration could be done, but as the saying goes, the devil was in the details. As Tim Isaacs explains, ***“The Proof of Concept took us two weeks, and then figuring out the rest took over two months”***. Given that it was a bespoke migration solution, this was actually an efficient solution.

This bespoke solution played a key part, but it was still Document Extractor that solved the initial issue. Deployment of Document Extractor was on-premises, covering the entire organization, and catered to all 340 licensed users.

Choosing Document Extractor offered The National Lottery Heritage Fund a plethora of benefits:

- **Native Experience:** The Salesforce users kept using the same UX, with documents presented in the Files component.
- **Searchability:** Users can search for the files within Salesforce and even preview them.
- **Versioning:** The system can recognize different file versions without overwriting them.
- **Productivity:** Document Extractor

is lightweight and efficient, not affecting Salesforce’s performance and keeping users happy and productive.

- **Cost-Effective:** Document Extractor deployed on-premises emerged as a more affordable solution.
- **Migration Assistance:** With a massive number of files to transition, Connecting Software’s expertise in aiding the migration process was invaluable.
- **Storage Savings:** The cost of storage is significantly lower than if the documents were stored in Salesforce.
- **Futureproofing:** This technology ensures that even if tools or platforms change in the future, their system remains robust and adaptable.

Final Words

The National Lottery Heritage Fund’s transition to a new way of managing documents using Document Extractor showcases the power of the right tool combined with the right expertise. As organizations globally face similar challenges, such success stories provide a roadmap to efficient, cost-effective, and seamless solutions. If you have questions about whether this could apply to your organization, do not hesitate to [contact us](#).

For more success stories, stay tuned to [Connecting Software’s blog](#).



CHALLENGE

Making 1.5 million documents initially stored in a SharePoint repository accessible from Salesforce without creating substantial storage issues.



APPROACH

Transferring files to Salesforce using metadata, then using Document Extractor to move them to SharePoint while maintaining a link in Salesforce.



OUTCOME

Cost-effective and future-proof document management system that allows easy access from both Salesforce and SharePoint.

PRODUCT APPLICATION



Document Extractor
Built for the Salesforce Platform™

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