MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
RFI-CASE-288020 REPLACE SALESFORCE CUSTOMER PORTAL WITH A COMMUNITY
QUESTIONS AND ANSWERS

Question	Answer
Is the existing portal mobile/tablet responsive? If not, does the Department have a preference to make the new portal mobile/tablet responsive?	No, it was not designed to be responsive. Our preference would be for it to be responsive but it is not one of our priorities at this time.
Is the current portal multilingual and if so, which languages does it support? If the current portal is in English only, does the Department have a preference to make the new portal multilingual?	No, it is English only and no plans to be multilingual at this time.
What is the approximate number of pages in the community that needs to be converted to lightning? (Scope section mainly refers to record types/fields/security)	This information is not relevant to this RFI, more detail to be provided in RFP.
Does the existing portal integrate with any external systems and if so, what systems does it integrate it and how?	No
Training and Support – is there a requirement for end user training and if so, provide some clarity on the user training requirements?	General Documentation/Instructions is expected for end users of the new Community. Technical documention and code walk-through is expected to be provided for all MEDC IT staff assuming support implementation.
What are the current licenses and personas of the current visual force community portal? If these licenses are not compatible with new lightning communities, should the estimate also include migration of users to the new license model as part of the transformation?	Current licenses of VF Portal is Overage Customer Portal Manager Standard. Yes, we would need to migrate all active Portal users to a Customer Community User License. We assume there may be a data clean-up involved by Business Analysts and MEDC staff prior to that migration.
Will vendors that respond to this RFI and assist the State in writing the RFP be precluded from responding to the future RFP for this same requirement?	No
Will MEDC confirm that one representative per vendor is sufficient for in-person presentations during this RFI process? Or, is it MEDC's expectation that multiple representatives per vendor will attend?	We would expect at least one representative per vendor. It is up to the vendor how many representatives are needed to present their information.
Are you utilizing standard page layouts in your instance or is it highly customized with apex?	Highly customized with Visual Force and Apex Code.
What are the biggest business benefits cited for this initiative?	Better overall User Experience and ability for IT staff to maintain/update more administratively allowing for faster response to MEDC staff requests. Also, to receive full support from Salesforce with Communities.
What additional applications need to be migrated during this effort?	None
Do you know your timeline for engaging a company for this work?	The responses that we receive from this RFI will help us to prepare and RFP and determine a budget and timeline for this project.
Is there a specific date they are trying to hit for the launch and why?	The responses that we receive from this RFI will help us to prepare and RFP and determine a budget and timeline for this project.
Do you or will you be using Shield?	We do not use Shield and have no plans to use Shield presently. In your response you may want to identify why we might want to use Shield.
Are your community users named users?	Yes
Are there guest users? If yes, what actions can a guest (unauthenticated) user perform/need to perform?	No, not as part of the current Customer Portal.
Is there a self registration process? How do users get access to the portal?	No there is not. Currently, MEDC staff request for an existing Contact be made a Portal User by a IT Business Analyst.
Do users need to see reports in the community?	Not at this time.

In the future do you plan to add additional communities?	We currently have two Communities and a Partner Community is in development. We may have additional Communities in the future but not currently planned.
Do/will e-mails utilize custom letterheads/html	This will not impact the Community Project.
How many Visualforce pages are you currently using in the portal?	This information is not relevant to this RFI, more detail to be provided in RFP.
How many apex classes are you currently using to support the portal?	This information is not relevant to this RFI, more detail to be provided in RFP.
Do the intake forms support save in progress? (Can users save and complete at a later time)	Yes
How many community profiles do you use?	We currently have two community profiles for our exisitng communities. We are planning to create one more community profile for this new Project Portal community.
What are your accessibility requirements?	ADA Website Compliant. In your response you may want to suggest where we should be with website compliance.
Are there any integrations? If yes, how many integrations	No
Will community users need the ability to search?	No, we are not expecting Search ability.
How are you controlling visibility to data in the community? Sharing rules? Sharing Sets? Apex Sharing? Custom Code using without sharing?	We are using Sharing Rules and Apex Code.
Do community users have the same profile or different profiles?	We currently have two community profiles for our exisitng communities. We are planning to create one more community profile for this new Project Portal community.
Are you utilizing permission sets to control access?	Not on the current Portal but may be needed with Community.
Do existing community users need the ability to create users for their company?	No
Do community users need access to companies/accounts outside their own? - Separate usernames or do they need to see data for all accounts under one username - Is it common for users to need access to other account data outside of their own? - User access to data based on associated Account record and one-off access based on Incentive record relationship, potentially other ways to grant access in future	We do have several business processes that currently require us to have separate usernames so we can maintain the level of security in the current Portal. We have been able to reduce the number of instances where this is needed and would like to to remove the need to do that if possible in the Community. Examples of this include Consultants who work with multiple Accounts, Users who actually are involved with seperate Accounts such as smaller start-ups.
Do users need to see files uploaded by other users?	Yes, on that Account and when uploaded by a MEDC employee.
Is it safe to assume that the existing Salesforce org. object structure will be used in the new project or is the MEDC looking to take this opportunity to revise the object structure to gain operational efficiency, where possible.	We plan to use the existing object structure
What version of Salesforce is the MEDC using? Are you using the non-profit starter pack?	No, the MEDC uses SF CRM Unlimited Edition (Sales Cloud).
How much custom development is in the existing customer portal, including: - Number of VF Pages? - Number of VF Controllers? -Number of VF Components? -Number of Apex Classes related to Portal Features?	This information is not relevant to this RFI, more detail to be provided in RFP.
Do you have a site map of the existing Customer Portal that can be shared? Will the existing customer portal site map be replicated in the new community or are you looking for a new site design?	The objects hierarchy/relationships remain the same but we are looking for a new design for the Community that improves the User experience.

How many sharing rules are in place in existing Customer Portal. How much record sharing is managed via Apex controllers?	The current customer portal record access is managed by Apex and VF pages.
The brief indicates that existing business processes and code should be reviewed and improved as part of this effort. Please include the following: List of existing internal business processes that support the Portal with a brief description. IE. -Web Lead >> Portal User Created. Web leads are manually reviewed by an internal user and approved for Portal user. Following approval the Lead is manually converted and enabled as a Community User -Ensure Compliance. ... -Grant Request Review. ... -etc.	Most of the business units/programs that use the Portal follow a similar process to the Process Flow included in Appendix A of RFI.
Code Review: Please provide additional information on the existing code review. IE: -Is this code review for "internal" code (meaning not part of the existing portal)? -How many code files will need to be reviewed? (Apex Class, Apex Trigger, Visualforce) -Is there a specific concern about the existing code (IE. security, performance) or just looking to improve it generally?	*Review of existing Portal code/processes *This information is not relevant to this RFI, more detail to be provided in RFP. *Performance and general improvements
Please provide additional information regarding the request to "improve our response time to internal staff requests"	MEDC staff make requests for updates to existing portal functionality and new functionality on a regular basis and the current turnaround time for the IT team to complete a request has been an issue due to all Portal functionality requiring a developer to make the updates.
Are multiple Portal user "hierarchy levels" being used (IE. Standard, Manager, Executive, Super User)? -(This question is asking if there are different levels of access to the community - can one customer do/see something on the community that another can't?)	Current Portal only has Standard Users and all have the same access based on the related Account.
Reports, Dashboards: -Please provide a list of reports and/or dashboard components that community users will need to see -Will any additional internal reports be required? IE. -Are there any new KPI's for the community?	*Not at this time *Not at this time *Not at this time
Cases: -Will community users be able to submit a case through the community and view the status? -If yes, does the internal process to support these currently exist?	*Not at this time
Chatter: -Will Chatter be enabled to allow communication between Community Users?	*Not at this time
Data Access: -Will the existing data model and sharing continue to be used in the community? (IE. Will users be able to see additional or less data in the community than they can in the portal)	Users should see the same data in Community as in the Portal. We believe we will need to modify the sharing rules or add external sharing rules in the new Community.
- Please provide screenshots of the existing portal pages '- Please provide a site map of the existing customer portal (individual pages and how they relate) '- Salesforce recommends (and we second) using a Community Template as much as possible. This allows a level of "customization" (IE. Fonts, Colors, logo, custom images on tiles) to approach the design of https://www.michiganbusiness.org/. Please indicate if any customization beyond this is necessary for: '- Homepage '- Internal Pages	*This information is not relevant to this RFI, more detail to be provided in RFP. *We believe the 'Build your own' template would need to be used and overriding CSS for Lightning elements to match the look and feel of Michiganbusiness.org.