

# Introduction to Shortify.ing

A Salesforce Native Short Link Generation & Management Solution



# Introduction to Shortify.ing

A 100% native Salesforce application.

Designed to enhance the security, efficiency, and effectiveness of your digital marketing and communication efforts.

Provides secure, reliable, and scalable link shortening and tracking capabilities.

Seamlessly works with your existing Salesforce environment.

Used globally since 2021, with a diverse customer base spanning various industries.

# Key Benefits of Shortify.ing

**Enhanced Data Security:** Customer Data Never Leaves Your SFDC Org

**Seamless Compatibility:** Compatible with Salesforce Sales Cloud, Marketing Cloud, Service Cloud & Experience Cloud

**Bulk vs. Single Link Creation:** Create and Manage Multiple or Individual Short Links at once



**Comprehensive Assimilation:** Easy connection through Salesforce Flow, APEX, REST API, Marketing Cloud API, AMPscript, and Other Methods

**Controlled Environment:** 100% of the process and execution occurs within your own controlled environment

**Manual vs. Automated Link Creation:** Choose between Manual Input via GUI or Automated Processes, Offering Flexibility and Efficiency

# Competitive Advantages

Why Choose Shortify.ing Over Other Short link Service Providers?



Comprehensive  
Native Application  
of Salesforce

Enhanced Data  
Security with 100%  
Operations within  
your Controlled  
Environment



Real-time Link Click  
Data Capturing  
Right in Salesforce  
for Comprehensive  
Decision Making

Migrate All Your  
Live Short Links  
from Existing  
Service Provider  
and Save Cost



Competitive Pricing  
Compared to Other  
Major Service  
Providers



**TRAI Regulation Compliance:** Shortify.ing supports the latest TRAI regulation which makes it mandatory to use sender's name within the shortened URLs being sent out.

# Use Cases for *SFDC Sales Cloud*

## Lead Nurturing

Track engagement with potential clients through personalized short links in SMS, WhatsApp, emails or Other Channels

## Sales Campaigns

Measure the success of sales campaigns by tracking link clicks in promotional materials

## Client Onboarding

Simplify the onboarding process with secure short links to necessary documentation and forms

## Performance Reports

Provide sales teams with real-time analytics on link performance to refine strategies

## Event Invitations

Manage and track RSVPs for client events with unique short links

# Use Cases for *SFDC Marketing Cloud*

## Personalized Marketing Campaigns

Improve click-through rates by using short links in the contents of the marketing campaigns via communication channels

## Social Media Marketing

Track the effectiveness of social media campaigns with custom short links

## Loyalty Program Updates

Shortify.ing generates secure short links to loyalty program updates, reward summaries, and exclusive offers

## Customer Surveys

Distribute and track responses to customer surveys with short links

## Promotional Offers

Drive traffic to special offers and promotions with trackable short links

# Use Cases for *SFDC Service Cloud*

## Case Resolution

Provide customers with short links to troubleshooting guides and resources

## Customer Feedback

Gather feedback on service interactions through short links in follow-up communications

## Knowledge Base Access

Share short links to knowledge base articles for quick reference

## Appointment Scheduling

Simplify appointment scheduling with trackable short links

## Service Alerts

Notify customers of service updates or outages with short links in SMS, WhatsApp, email or Other Channels

# Shortify USP and Current Features

100% Native  
Solution

Realtime Response  
Tracking and  
Processing

Branded (custom)  
Domain Support

Create Shortlinks  
with Friendly Texts

Change  
Destination of Live  
URLs

Migrate Live URLs  
to Shortify

Pre-configured  
SFDC Campaign &  
Reports for Input

Bulk URL  
Generator within  
Minutes

Personalized URL  
Generation

CSV file Support  
for Input and  
Export

Supporting  
Salesforce Flow &  
Community Plus

Supports APEX &  
REST API



# Seamless Compatibility with all SFDC Clouds



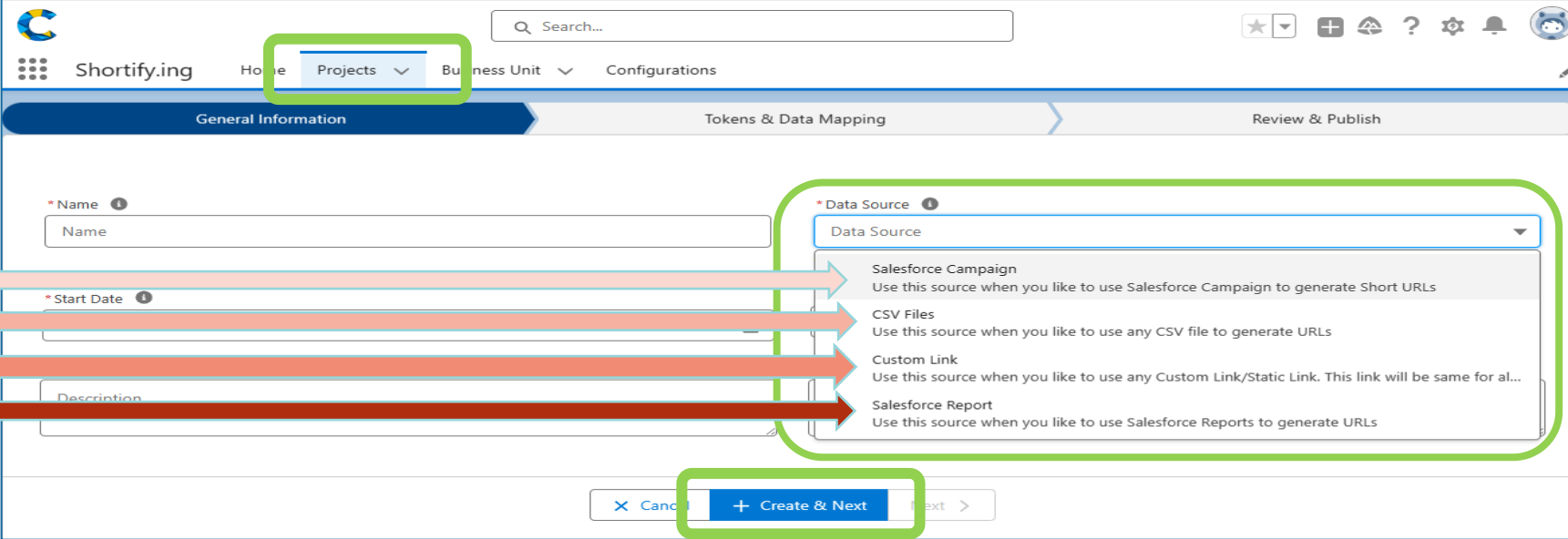
# Short Link Generation Methods

Short link Generation Method	Automation	Manual	Single Link	Bulk
Salesforce Flow	✓		✓	
REST API	✓		✓	✓
APEX Code	✓		✓	✓
Marketing Cloud API	✓		✓	
Custom Link through UI		✓	✓	
LWC Widget		✓	✓	
CSV Upload		✓		✓
Campaign Management		✓		✓
Salesforce Reports		✓		✓

# Easy GUI Based URL Shortening

4 types of URL shortening process flow based on data input/source –

- (1) SFDC Campaign
- (2) CSV File (bulk)
- (3) Custom Link
- (4) SFDC Report



Search...

Shortify.ing Home **Projects** Business Unit Configurations

General Information Tokens & Data Mapping Review & Publish

\* Name   
 Name

\* Start Date   
 Start Date

Description

\* Data Source   
 Data Source

- Salesforce Campaign  
Use this source when you like to use Salesforce Campaign to generate Short URLs
- CSV Files  
Use this source when you like to use any CSV file to generate URLs
- Custom Link  
Use this source when you like to use any Custom Link/Static Link. This link will be same for al...
- Salesforce Report  
Use this source when you like to use Salesforce Reports to generate URLs

X Cancel + Create & Next Next >

Case **Question regarding the Apex support for Shortify** + Follow Edit Delete Change Owner

Priority: High Status: Closed Case Number: 00001161

Feed Related **Shortify URLs**

**Shortify Widget**

Search data according to description

	Short Key	Last Activity	Expiry Date	Description				
1	HrXXAXc	1 Year(s) ago	No Expire	apex-api-use	8			
2	IVkC3Iz	1 Year(s) ago	No Expire	Test Class	5			

Details

**Shortify URL**

Sanjay Singh

Case Number: 00001161

Contact Name

Contact Email

Account Name

LWC Widget Example in 'Cases'

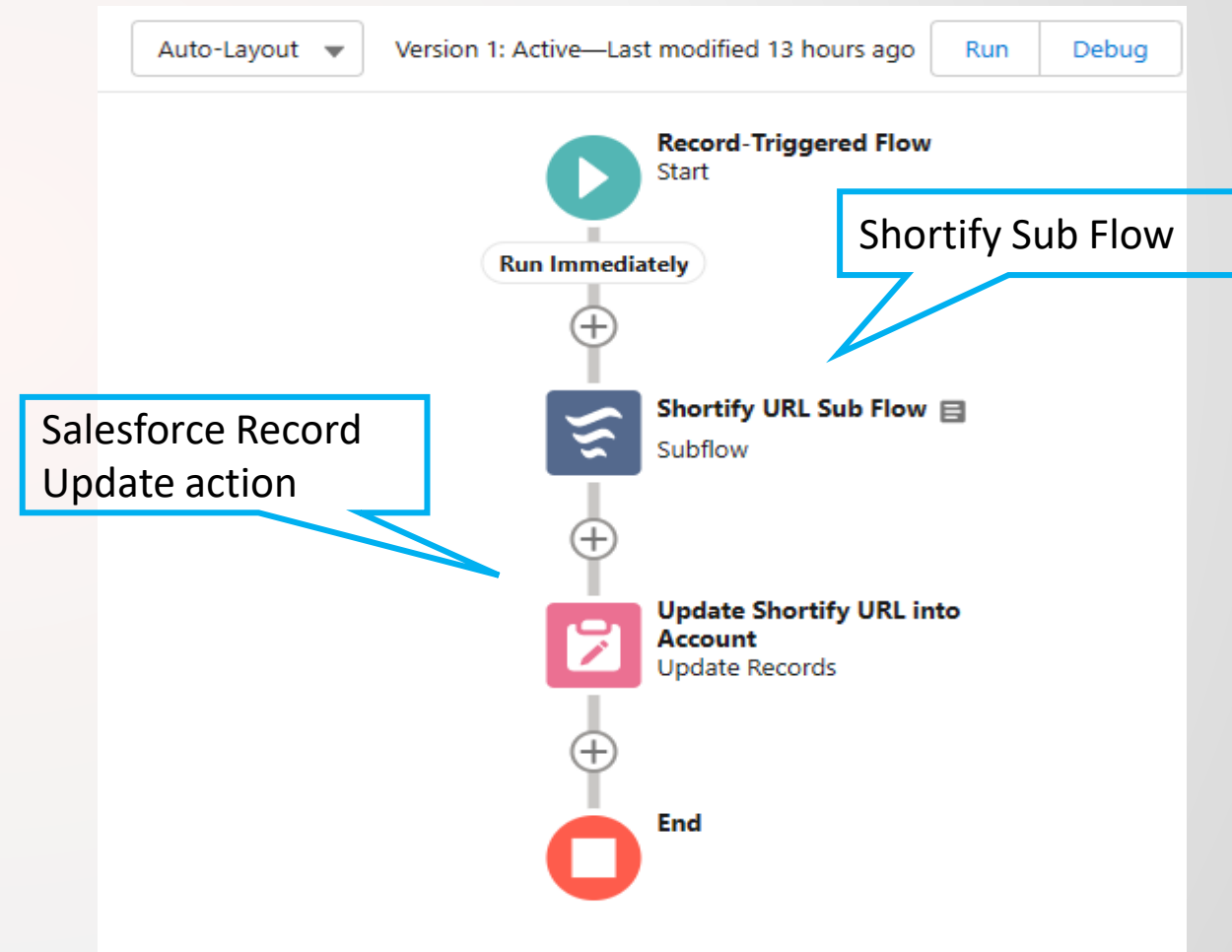
- (1) LWC Widget Pop-up Window
- (2) LWC Widget On the Page

# Salesforce Flow Use

## Process Steps to follow -

1. Create Record Trigger flow on Account Creation.
2. Create a custom field "Shortify\_URL\_\_c" in the account object. If you do not want to save Short URLs into any field, then create a flow variable to store Short URL and assign Short URL value in this variable
3. Select "Shortify Sub flow for Short URL creation" sub flow
  - a) Set Input Values (bucketName, sObjId and longURL are required field, others are optional )
  - b) Set Output Values (shortURL is required, others are optional)
4. Add Update Record action
  - a) Map "Shortify\_URL\_\_c" account field with "\$Record → Short URL"
5. Save Flow
6. Verify Flow

## A sample Workflow



# REST API – POST Method

## Request:

Header

X-CFSU-API-KEY: API\_KEY

Data/Payload:

```
{
  "name": "Sample Opportunity",
  "sObjectId": "S_OBJ_ID",
  "sObjType": "S_OBJ_TYPE",
  "urls":
  [ {
    "longURL": "https://workbench.developerforce.com/restExplorer.php",
    "identifier": "test1",
    "description": "Test Description"
  },
  {
    "longURL": "https://workbench.developerforce.com/restExplorer2.php",
    "identifier": "test12",
    "description": "Test Description2"
  }
]
```

## Response:

```
[ {
  "viewCount" : 0,
  "urlBucketId" : "a019D000003lrDWQAY",
  "shortURL" : "http://cfsu.in/OI2JfmQs",
  "longURL" : "https://workbench.developerforce.com/restExplorer.php",
  "key" : "I2JfmQs",
  "identifier" : "test1",
  "id" : "a059D00000Be5eUQAR",
  "description" : "Test Description",
  "apiKey" : null
}, {
  "viewCount" : 0,
  "urlBucketId" : "a019D000003lrDWQAY",
  "shortURL" : "http://cfsu.in/qNF8uf3",
  "longURL" : "https://workbench.developerforce.com/restExplorer2.php",
  "key" : "qNF8uf3",
  "identifier" : "test12",
  "id" : "a059D00000Be5eVQAR",
  "description" : "Test Description2",
  "apiKey" : null
}]
```

# Marketing Cloud API - Sample

## Sample code with variable names

```
set @createLead = CreateSalesforceObject(
    "cfsu__URL__c", 3,
    "cfsu__RedirectURL__c", 'ORIGINAL_FULL_URL',
    "cfsu__DataDump__c", 'SHORTIFY_PROJECT_ID',
    "cfsu__Identifier__c", 'CUSTOMER_ID',
)
```

## Sample code with variable values

```
set @createLead = CreateSalesforceObject(
    "cfsu__URL__c", 3,
    "cfsu__RedirectURL__c",
    'https://docs.google.com/presentation/d/14DD2jIDw1PBLItVVpTHDyTJYTHIU4l96auhhNub2tg/edit#slide=id.g188ba16ee0c_0_130',
    "cfsu__DataDump__c", 'a01dN000001UP22QAG',
    "cfsu__Identifier__c", '003dN000000lofuQAC',
)
```

# APEX - SAMPLE CODE

```
cfsu.URLBucketTOv1 urlBucketV1TO = new cfsu.URLBucketTOv1();
urlBucketV1TO.name = 'Sample Account Name'; // Name can be anything, it is used as a URL bucket (Container) name
urlBucketV1TO.sObjType = 'Account'; // Salesforce SObject API name, this is required field
urlBucketV1TO.sObjectId = '0015g00001EUbK6AAL'; // This id must be valid Account ID since sObjType is Account

cfsu.URLTOv1 urlV1BO = new cfsu.URLTOv1();
urlV1BO.identifier = 'SingleURL'; //This should be unique for your process so that you can identify returned values. Useful with
bulk URL creation
urlV1BO.description = 'Sample Single Short URL'; //Anything you like
urlV1BO.longURL = 'https://customerfoster.my.salesforce-
sites.com/paramdetails?salutation=Ms.&email=rose%40edge.com&firstname=Rose&lastname=Gonzalez&leadsource=Procure
ment';

cfsu.ShortifyAPIv1 shortifyAPIv1 = new cfsu.ShortifyAPIv1();
cfsu.URLTOv1 testedURLVO = shortifyAPIv1.createShortURL(urlBucketV1TO, urlV1BO);
String shortKey = testedURLVO.key; //Key of Short URL
System.debug('Shortify key -- '+shortKey);
String shortURL = testedURLVO.shortURL; //Short URL
System.debug('Shortify short URL -- '+shortURL);
```

# About Us

## CustomerFoster Solutions Private Limited

- CustomerFoster Solutions Private Limited is dedicated to developing innovative Salesforce solutions.
- As a trusted Salesforce partner, we specialize in creating applications that enhance security, efficiency, and effectiveness in digital marketing and communication.
- Our flagship product, Shortify.ing, has been serving a global customer base since 2021.
- Committed to providing top-notch support and continuous innovation to meet our clients' evolving needs.



# Deployment Plan

## Phase 1: Planning and Assessment

- Conduct a detailed assessment of your current link management processes.
- Define goals and success criteria.

## Phase 2: Installation and Configuration

- Install Shortify.ing with your existing Salesforce Org.
- Configure Salesforce settings to match your specific requirements.

## Phase 3: Custom (branded) Domain and Web Hosting Configuration

- Configure custom domain settings as per the configuration guide.
- Set up redirection configuration on the web hosting of the custom domain.

## Phase 4: Testing and Validation

- Perform thorough testing to ensure all functionalities are working as expected.
- Validate results against predefined success criteria.

## Phase 5: Deployment and Training

- Deploy the solution in production and complete the required configuration.
- Performance sanity check and make it live.
- Provide comprehensive training to your staff.

# Conclusion and Next Steps

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Shortify.ing will certainly bring significant value to your process and business.

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It will enhance your digital marketing efforts, ensures data security, and provides robust analytics.

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Please review the attached documents and reach out with any questions.

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We look forward to discussing the next steps and starting the implementation process.

# Contact Information

## Sales Contact –

Preeti Singh  
Enterprise Sales Manager (Shortify.ing)

Email:

Preeti@shortify.ing

Sales@shortify.ing

Phone: (+91) 77391 80768

Website: <https://shortify.ing>

## Corporate Contact –

Garima Sinha  
Director,  
CustomerFoster Solutions Private Limited

Email: [garima@shortify.ing](mailto:garima@shortify.ing)

Phone:

(+91) 85919 36345

(+1) 212 2030475

**Thank You**