

NGO case Help Images

Operational and reporting
process automation



Help Images is a Portuguese non-profit organisation, founded in 2008, with the main purpose of bringing attention to some of the social problems with the production of media content.

The NGO work with other non-profit organisations in countless campaigns, for example, in fundraising, increasing the numbers of volunteers or promoting their mission.

The organisation has a professional team specialised in video & content, and offer media support to other NGOs, developing action plans with the aim of decreasing costs and becoming more efficient at getting messages across in the best way.

So far, Help Images have supported projects in Portugal, São Tomé and Príncipe, Senegal and the United Kingdom.

The Challenge

- Since 2014, Help Images has used the Salesforce platform to manage all their activity.

The CRM software has the ability to store and sort all the video footage, that can be watched in schools, prisons and other organisations that Help Images work with.

Furthermore, the platform is essential for elaborating on reports that have the potential to be vital to the organisation, making visualisations of statistics available to third parties, such as those responsible for the production of videos.

- Help Images challenged Xpand IT to improve their version of Salesforce (previously in Classic view), and ended up requiring some time-consuming additional work in preparing reports for the organisation, where the data had to be extracted and worked on in Excel, and in preparing sessions since the solution did not allow the segmentation of these, requiring the data to be changed every session.

This resulted in an overlap of current data over previous data, and that no history could be preserved for future analysis.

Solution

In order to simplify Help Images daily business, the first goal tackled was the **upgrade from the Classic version of Salesforce to the Lightning version** (the most current).

Then, the data model related to the alignments and the sessions was restructured, without changing the composition of the videos in the alignment, while allowing multiplication of the sessions (previously within the entity that represented the alignment) in their own entities.

In this way, it became possible to **retain the data history** for each session, as well as **reuse the alignment** for other audiences.

In reporting terms, and to facilitate all the tasks associated with operational reporting, a tailored component was developed, which returns the number of views per video, based on **pre-defined filters, such as themes or start dates, or the end of accounting.**

Throughout this process, it was also necessary to **automate the development of questionnaires** when creating sessions, always based on the alignment of these.

Technology

In this transformation, based entirely on the Salesforce NGO platform, Xpand IT implemented:



- Object manager**
 Allowing the creation of objects, fields and screens to simplify the organisation's daily tasks.
- Process builder**
 A mechanism in the code that allows actions to be triggered based on the conditions of registration.
- Flow**
 A tool in the code that facilitates the creation of the design and implementation of automation in Salesforce.
- Lightning components**
 Frontend framework for developing components to add (for example) to registration pages, a homepage or screen flows.
- Apex**
 A programming language used in Salesforce, which facilitates executing flow control instructions on the components or additional logic, in order to extend the platform's capabilities.

Benefits

A Salesforce platform update, bringing a more appealing and intuitive look and feel, and facilitating all session management

Simplification of the reporting processes, which have become faster

Automating the completion of questionnaires, and eliminating the need to develop them individually

Improved communication between Help Images and its audiovisual partners



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