

# Process management with Salesforce

Management of applications, budgets and HR calendar



## FLAD

LUSO-AMERICAN DEVELOPMENT FOUNDATION

Fundação Luso-Americana para o Desenvolvimento (FLAD) is a non-profit organisation whose main objective is to promote Portugal in the United States of America through actions such as scholarships and support for students and researchers, and science and culture awards, amongst others.

Founded in 1985, FLAD is a member of the main national and international foundation networks and is recognised as one of Portugal's leading foundations.

## Challenge

When FLAD contacted Xpand IT, its entire operations management was in the process of moving from the old platform to Salesforce technology: from its relationship with entities (organisations and individuals), the management of grants and awards, budget and project management to the categorisation of correspondence and the management of calendars and collaborators.

However, the existing solution was not in tune with FLAD's needs.

- The processes presented incomplete budget management values, the architecture for managing applications for support was complex and not very flexible, and project and application references needed to become dynamic, with an easier management model, so that FLAD could get the forms online fast.

## Solution

FLAD uses the Salesforce solution on a daily basis and as a transversal platform, not limited to CRM functionalities. So, the solution proposed by Xpand IT was to correct incorrect processes. There are three processes that stand out in this solution:

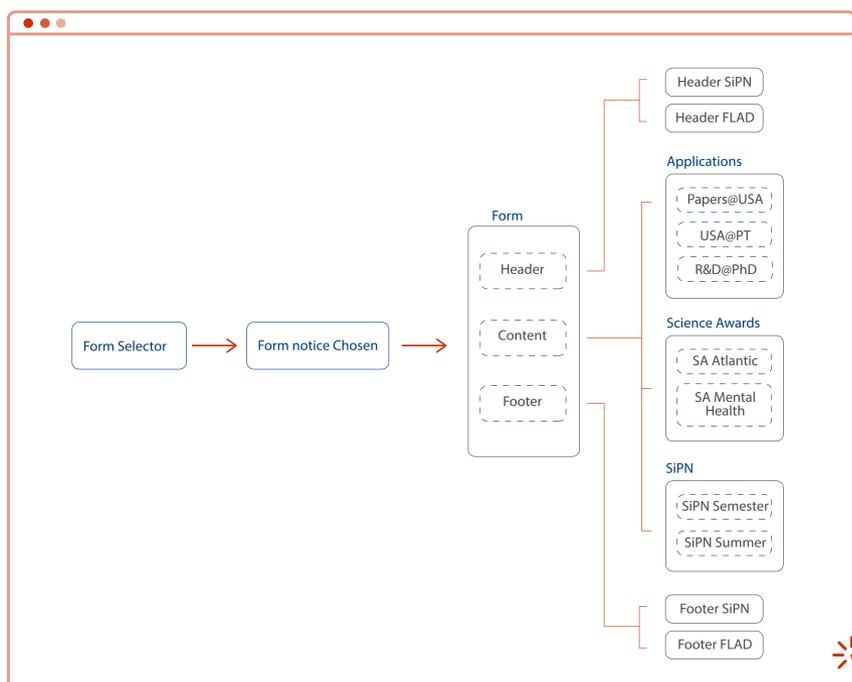
### 1 Management of applications

It is the most important component in the solution, supporting applications for grants, research, awards and the SiPN (Study in Portugal Network) Programme.

The integration of FLAD's site with Salesforce means that once the application has been filled in, automatic emails will be sent to the candidate, confirming receipt of the application, and to the head of the competition who will analyse and classify it. When the application is accepted, a project is created, or it is integrated into an existing project.

The entire process is based on a Salesforce solution. By parameterising screens and automating the process, FLAD employees can take steps to follow up on the evaluation of the applications and, if they are approved, convert them into projects.

**This makes projects fluid, dynamic and easy to manage. The modular structure of the page created is similar to the one in the following image:**



### 2 Budget management

Every year, FLAD determines the budget for each of its different areas, indicating the amount to be allocated to each one in Salesforce.

Each area has a set of related projects with associated expenses and support paid to their beneficiaries, the values of which are calculated by the solution by adjusting the available values of both the project and the budget line.

### 3 HR calendar management

All absence management, from scheduling, approval and coordination with other employees, is done through the Salesforce solution.

If they are holiday absences, the number available is calculated and displayed. These can be viewed in a collaborative calendar in order to facilitate the coordination of holidays and avoid bookings when employees are absent.

The possibility to schedule meetings in a shared calendar, associating all the information of a specific project to which the meeting refers, is also very used.

## Technology

The FLAD solution is based on the Sales module of the Salesforce ecosystem, the #1 cloud CRM in the world. For the development of this solution Xpand IT used:



- Sales Cloud Module**  
A base data structure that makes it possible to carry out implementations with less effort;
- Apex and Visualforce Framework**  
Custom development technology that allows you to go beyond the base system, used for the WEB forms system;
- Automation flows**  
Salesforce component that allows you to create processes without the need to create code.

## Benefits

With this solution, the Luso American Development Foundation has achieved

The rapid creation of application forms, reducing the time it takes to get them online;

Easy and intuitive application management, making user adoption faster;

The efficient management of budgets and projects, obtaining a greater level of detail;

Greater corporate visibility, through easy-to-read dashboards.

Greater sharing of information between the team and improved internal communication.

