




Case Study

NGO Humanitarian Organization: Drupal Integration to Salesforce



Client Introduction

Non-governmental organizations, from international to local and national NGOs, are working together to revolutionize the global humanitarian system. That is who the client is. They believe that by solving issues, such as slow funding and refusal to grow, they can better help people in need.



Application House and the Client: How Did the Partnership Start?

The client was first onboarded with the help of Application House with several admin tasks. It includes:

- Creating users & inactivating users
- Data cleaning and de-duping contact
- Resolving login/access issues and bugs
- Reviewing security features & sharing rules

The successful and effective way we completed these tasks proved our reliability. Because of that, the client enlisted our help again on other projects, like security, and now, freeing up a user for integration.

The Project

The Situation

- The client has certain information from their Salesforce flowing onto their public website. One such is Humanitarian Action Data. This record contains information on global events, including natural disasters like earthquakes, floods, and hurricanes.
- When an event occurs, the client creates a Humanitarian Action Record containing details related to such an event.
- It has the alert type, the cause, the country, alerting organizations, funding projects, and survey responses.

The Project

The Situation

- For every humanitarian action, the involved organization members will discuss their course of action, the fund to award, the organization it will be awarded, and the manner of distribution.
- All this information will also be in the Humanitarian Action Record, the briefing note, the link to the allocation meeting minutes, the allocation decision start date, and the allocation decision end date.

The Problem

- Now, the client has some information they feed to their public website's Humanitarian Actions Fund dashboard. It includes information such as the humanitarian action name, humanitarian action date, country, crisis cause, the amount awarded, and the agencies funded.
- They used integration to get these data from Salesforce to their Drupal website using the former employee's user, who later left the organization. Despite the employee's exit and running out of licenses, the client couldn't just deactivate the user because it's used for the integration.
- So, they have asked Application House to help free up the user while maintaining the data flow from Salesforce to the website.

Solution: The Application House Process

The First Step: Discovery & Analysis

- With several discovery calls made, Application House dived deep into the client's requirements and checked every angle. And once we understood what they needed, we updated a Connected App which will allow the client to assign any user for the integration.
- The Connected App's Permitted Users is set to "Admin-approved users are pre-authorized". It means the client can set the permission to the connected app to any user they wish to. This user can then be used to log in to Salesforce and bring their data to the website.

Solution: The Application House Process

The Second Step: Planning & Development

- The next step is ensuring everything will run smoothly, so Application House created a Sandbox of the client's Salesforce, as well as their website. We also coordinated with the team that handled their website, created using the free and open-source web content management system Drupal. We've had several calls with them to study and understand how the Drupal Integration with Salesforce works.
- Their team also gave us access to their Sandbox and a staging environment for the website. We then connected the staging environment to the Sandbox and tested how everything will go: from deactivating the former employee's user to changing the Connected App. And everything worked successfully.

Solution: The Application House Process



The Third Step: Implementation

- The next step now was to make the changes in the production: the client's actual Salesforce. Application House deployed the connected app, deactivated the former employee's user, and assigned permission to that connected app to another user.
- This allows them to continue to bring their Humanitarian Action Data from Salesforce to their website without the former employee's user.



The Result

The client freed up a user and is no longer tied down to a single user for their integration with the website. They have the authority to assign the permission of the connected app to any user they choose, allowing the continuous flow of information to their public domain.



Client Feedback

"The Application House team was a great help to our organisation, worked quickly and efficiently, and suggested new solutions and approaches to our processes. We were overall very happy working together!"



Project Review - Salesforce Verified

Available on AppExchange : <https://appexchange.salesforce.com/appxConsultingListingDetail?listingId=a0N4V00000G6nevUAB&legacy=true>)

The Application House Value in the Project

Application House looks at your needs from every angle. In the same way, we dug deeper into the client's requirements. It's important to do so to give the right solutions. So, for your Salesforce needs, you need someone who knows the platform inside and out and understands the factors involved.



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The Application House Value in the Project

With our skills and expertise in Salesforce, we understood intricate details such as:

- how the integration works
- how to set up the settings
- what level of access do users require
- how can that be authorized
- how to set permission set

The Application House Value in the Project

- And because we understood the core Salesforce Platform of what was needed, we completed the project. And we did it at a tenth of what it would've cost if the client had hired a separate integration developer.
- It's the Application House value. We offer genuine expertise for your Salesforce needs because we want you to get the most from the Salesforce platform, and we do so on a budget that works for you.

Application House's Salesforce Certification

Admin Certifications



Consultant Certifications



Architect Certifications



Developer Certifications





CONTACT US

So, if it's something you're interested in,
send us an email at **sales@applicationhouse.com**.
We're ready to help you!

Client company names can be shared on request



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