

## Hoyleton Youth and Family Services - Admin On-Demand

### ORGANIZATION

Our client, Hoyleton Youth and Family Services, began its mission in 1895 as a health and human service organization that serves to restore families, prepare young adults to make positive life decisions, help parents and guardians become stronger and provide wellness education to build stronger communities. The core programs include therapeutic residential care, foster care, services for emerging adults, community mental health services, Latino outreach, education, support, and prevention services.

### CHALLENGE

The client was actively working in a Salesforce Nonprofit Success Pack (NPSP) environment and leveraging a majority of its functionality as well as highly customized components. Their immediate need was to simplify the submission process for their Youth candidates into the required state-stanchioned IM+CANS database and qualification portal. The data necessary for the submission while being located in Salesforce was scattered throughout the system. The manual submission process for submitting a single candidate took on average 4 hours per day for a Hoyleton employee to submit all the required data to the State-run database.

### TECHNICAL SOLUTION

XTIVIA reviewed the client's business needs and presented an optimal solution to move forward. We identified all the required elements in Salesforce needed for the submissions process and created custom automation that would export all of those elements into a single XML file. To achieve this, we had to modify several of the field formats in Salesforce to be compliant with the state portal and perform data transformation within the apex class to convert Hoyleton values to compliant State formats for a successful upload.

The end result is **~500 fields, and their values were extracted into an XML file with a single button click** from the Contact record in Salesforce. The Hoyleton employee would then save that XML file and upload it into the state-provided portal, which allowed XML uploads. All fields and their values are successfully uploaded to the site.

### BUSINESS RESULT

This end solution **reduced the operational submission process for youth candidates from 4 hours to 5 minutes**. It enabled the client to provide support to more young adults and use their employees' time more productively.

In addition, this client is a managed services customer to who we continue providing consulting and development services on an ongoing basis.

## CUSTOMER QUOTE

*“XTIVIA is a vital partner in the human service work we do as an organization. The system efficiencies they develop on our behalf allow us more time to connect with those we serve. Working with them helps us accomplish our mission.”* - Jennifer Cox, Director of Information Systems and Performance Improvement

## KEYWORDS

Salesforce, Apex, Trigger, NPSP, Nonprofit, Managed Services, Admin-On-Demand, Consulting, Configuration, Development

## SOFTWARE

Salesforce, Nonprofit Success Pack

## CLIENT LOGO



## ABOUT XTIVIA

XTIVIA is a proven technology integration and innovation company known for delivering leading-edge technology solutions to our clients' specific requirements, regardless of project complexity. We bring next-level business operations to reality through Application Development, Business Intelligence, Data Warehousing, Database Support & Management, Enterprise Information Management, Digital Experience Solutions, and Enterprise Resource Planning. Our success stems from a demonstrated ability to deliver deep expertise via professional services, empowering clients to leverage their chosen technology successfully, competitively, and profitably. XTIVIA has offices in Colorado, New York, New Jersey, Missouri, Texas, Virginia, and India. <https://www.xtivia.com/>