



Family &
Community
Services



DaDaDocs
by PDFfiller

How DaDaDocs Solved Document Management for an Australian Government Agency

PDFfiller's DaDaDocs integration for Salesforce offers a complete PDF document editor, document generator, eSignature solution and form builder.

a publication of **PDFfiller**

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FACS, a government agency in New South Wales, launched the ChildStory program as part of its mission to provide social services to vulnerable children within the state.

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Managing legal documents for minors presents challenges including the need to search through hundreds of pages instantly, black out personally identifying information and obtain electronic signatures.

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DaDaDocs by PDFfiller provides all of this and more without having to leave Salesforce, ChildStory's main platform, while meeting strict security requirements.

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The DaDaDocs integration provides a complete PDF editor, eSignature solution and form generator within Salesforce.



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The ChildStory program, commissioned by Family and Community Services in New South Wales, Australia, uses Salesforce as its main platform. Childstory had specific needs for document management that existing integrations couldn't meet, including searching PDF documents, blacking out sensitive information and collecting eSignatures. PDFfiller's DaDaDocs for Salesforce was the solution of choice for these important aspects of document management. This successful partnership with PDFfiller illustrates how other organizations searching for document management solutions inside Salesforce can use DaDaDocs.



The Family and Community Services (FACS) cluster works with children, adults, families and communities to improve lives and help people realise their potential.



ChildStory is an information technology system that will place each child supported by the child protection system at the centre of their story with a network of family, carers, caseworkers and other service providers around them.

The full range of PDFfiller's DaDaDocs integration can take hours off of an organization's workflow by automating key aspects of document management within Salesforce. The intuitive PDF editor doesn't require downloading any software or files to edit documents such as contracts and sales proposals. The complete eSignature solution means that any document can be signed instantly by anybody anywhere in the world. It's also possible to generate fillable forms to collect and export data. These powerful features make DaDaDocs the ultimate document app for Salesforce.

1 FACS and the ChildStory Project

Family and Community Services [FACS], a government agency in New South Wales, Australia, is tasked with protecting and serving some of society's most vulnerable members such as the disabled, elderly and children in high risk homes. As part of this mandate, FACS initiated the ChildStory program to change the way caseworkers, courts, police officers, medical staff and other interested parties would come to view and relate to the children with whom they worked.



Using best practices gleaned from the business world, ChildStory takes a child-centric approach to casework by weaving disparate documents from police officers, caseworkers, medical professionals and other interested parties into a seamless tapestry telling a child's story. That's how Salesforce came to be the centerpiece of FACS's 100-million dollar technological program. The same tool that was critical for businesses and sales teams the world over was easily adapted to meet the needs of FACS workers by putting children and their stories instead of the nitty-gritty of multi-million dollar sales deals into Salesforce. This was one of the first critical steps in realizing the broader vision of ChildStory.

2 Document Management Challenges Facing ChildStory

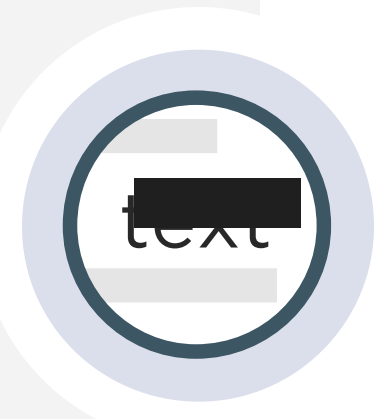
Handling documents involving minors poses several specific problems that required technological solutions - otherwise the entire project would have either ground to a halt or been forced to use a hodgepodge of solutions outside of Salesforce. Privacy laws dictate that names and other personally identifying information of minors must be redacted from documents. This presented several technological challenges that existing Salesforce PDF editors couldn't meet.

3 How DaDaDocs Works for ChildStory

DaDaDocs was able to find a solution to each document management problem that ChildStory posed. Here's a detailed look at how DaDaDocs filled the gaps left by other Salesforce apps:



1. FACS caseworkers need to search inside PDF documents to quickly find each instance of a child's name and other specific information. Manually skimming hundreds of pages of documents is both time consuming and error prone. DaDaDocs can search and find text in any native PDF.



2. Most PDF editors don't actually remove blacked out information from a file. Instead, a black image is placed over the text leaving the original information visible to a computer. This was not acceptable to FACS, which is why they turned to PDFfiller to create a true black out feature. When text is blacked out, erased or redacted using DaDaDocs, the text is truly removed from a file, thus protecting confidential information.



3. Adding electronic signatures is another key function that FACS required as part of the ChildStory project. Documents often require signatures from community partners such as police officers, agents of the court or medical professionals. Getting eSignatures with DaDaDocs works seamlessly within Salesforce. There's no need to even open a new browser tab. This makes it fast, easy and convenient to get any document signed.



4. Complete data security was another must for the sensitive nature of the ChildStory project. Many SaaS products indefinitely store a client's data and even private documents on company servers. 'Deleting' a document is another optical illusion, whereby the user merely loses access to their own data. Security experts caution that this can have serious consequences in the event of a data breach. With PDFfiller, your data is yours: when you delete a document, it is deleted from our servers meaning that no unauthorized third party can ever access your documents after you've deleted them. We don't store any deleted documents to mine them for data or use them to train machine learning algorithms.

DaDaDocs makes it possible for caseworkers in NSW to do all of this within Salesforce, which they already use as part of the larger ChildStory program. A document can be uploaded to or generated in Salesforce. From there, a FACS caseworker doesn't need to leave Salesforce in order to open DaDaDocs. All that needs to be done is enter the child's name or other personally identifying information in the search bar and select blackout. Once the document is saved, the caseworker can send out the document with full confidence that each instance of sensitive data has been completely obscured. Furthermore, the document is automatically deleted from PDFfiller and retained only in Salesforce.

4 DaDaDocs for Any Organization

When confronted with the unique needs of the ChildStory project, PDFfiller responded with DaDaDocs. Today, the scope of the integration goes well beyond this specific use case. Any team that uses Salesforce, from a small sales department to a large corporation, can manage documents more efficiently with DaDaDocs.

The ChildStory program uses DaDaDocs to redact and sign PDF documents, but this is only the beginning. DaDaDocs can also generate interactive fillable forms that make it fast, easy and efficient to collect data from clients. You can easily use data from filled in forms as a Salesforce object or export it to Excel.



The full featured editor in DaDaDocs expedites any process involving PDF and Word documents. There's no need to download, print out or redo a contract or proposal with a typo - it can be fixed right inside Salesforce. There's also no need to print out and overnight urgent documents that need to be returned as quickly as they were sent - any document can be signed without leaving Salesforce.

The government of New South Wales counts on PDFfiller to deliver with DaDaDocs for Salesforce. When child safety and welfare are on the line, there's no margin for error when it comes to security and productivity.