

PDFfiller and Crisis Text Line

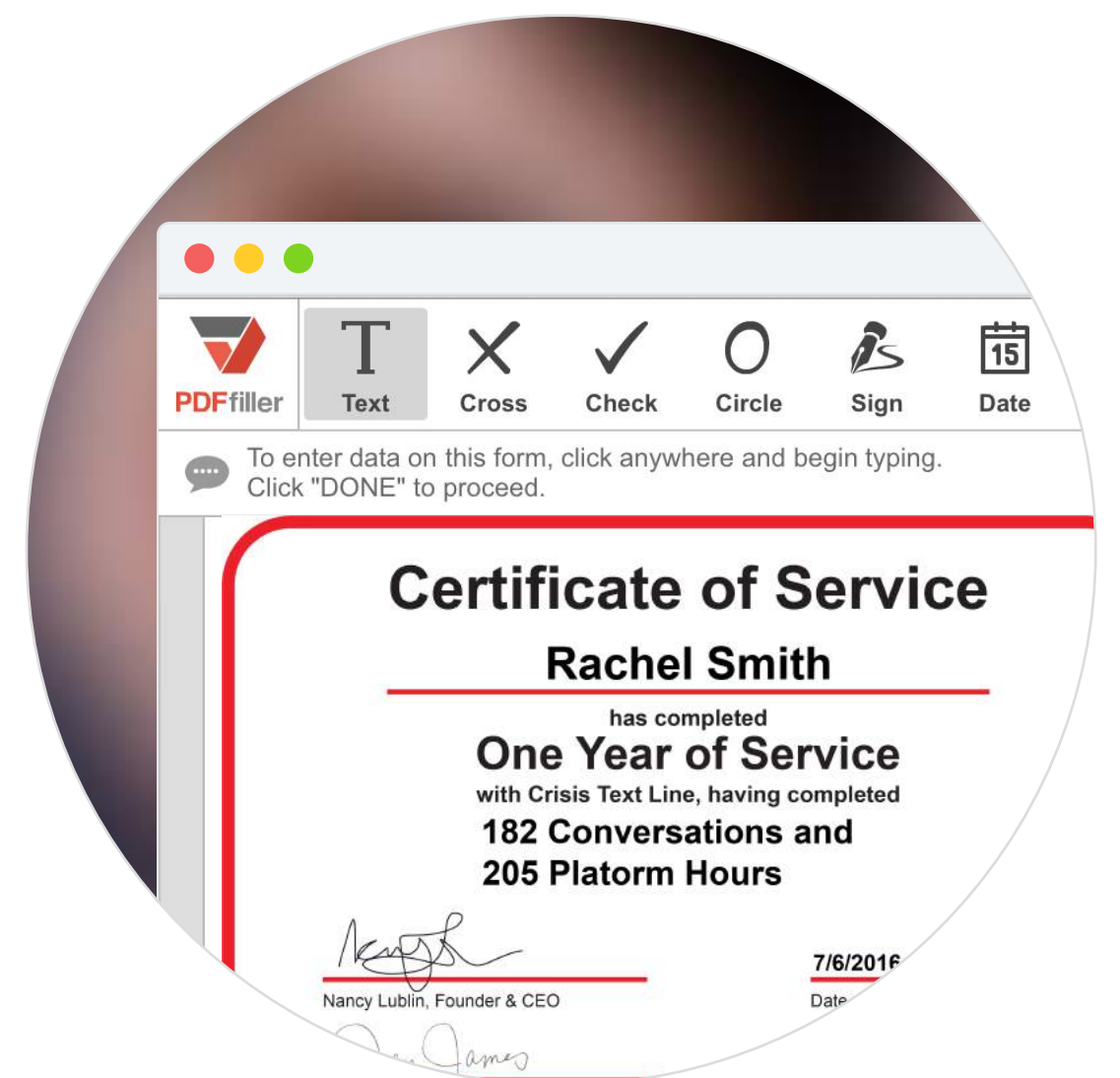
Filling Out & Sending Thousands of Certificates of Excellence Automatically





THE ISSUE

Automating Production of Certificates of Excellence



With a fast-growing network of over 1500 volunteers, Crisis Text Line wanted to recognize their volunteer's outstanding crisis response efforts. As part of expanding the volunteer onboarding process, Crisis Text Line wanted to speed up the creation of two kinds of certificates; one for graduation from a 34-hour crisis response training program, and another for the completion of a year's worth of service. To do this, the nonprofit needed a way to automatically generate a certificate that was simple, flexible, and easy to integrate with their volunteer database and computer.

Crisis Text Line is the first national 24/7 crisis support line that does crisis intervention all through text message. With 20 million text messages in 3 years and 8 active rescues a day, Crisis Text Line needed a system with the capacity to keep up with the speed, growth, and the critical nature of their operations. Crisis Text Line had used open-source PDF libraries in the past, but now they wanted to find a way that was simple and customizable, without having to build a new system from the ground up.

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THE SOLUTION

PDFfiller's API for Filling PDFs



After identifying PDFfiller's API as a tool with the ideal feature set, Crisis Text Line created a new integration with the capacity to streamline all kinds of internal document management workflows, including tools to automate document filling, signature collection, and custom branding.

To start the process of automatically filling certificates, Crisis Text Line uses PDFfiller to create a base template embedded with the signature of the granting organization and with fillable fields for volunteer data. Then, using a pre-determined trigger, the volunteer names and the date of course completion are sent in a data call for automatic filling via the API. For the recipients of one-year certificates, Crisis Text Line also sends the number of conversations the volunteers have taken, as well as the number of hours they've spent in those conversations.

Once the certificate is automatically filled with data by PDFfiller's API, Crisis Text Line gets a link to the hosted version of the PDF and sends it to the volunteers in a congratulations email they receive when they've completed the program. It's that simple! Now that this initial part of the process is complete, Crisis Text Line can take the next step of using PDFfiller's API to automatically send out their certificates.

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THE BENEFITS OF USING PDFfiller

A Flexible Tool and a Developer Focus



Saving Time & Money

Using PDFfiller's API for automated certificate filling has picked up the pace of production, enabling Crisis Text Line to generate around 300-500 certificates a month. The process for the creation of both types of certificates is completely automated, and essentially runs itself. With the API integration in place, Crisis Text Line can easily meet their future goal of accommodating triple the current number of volunteers.



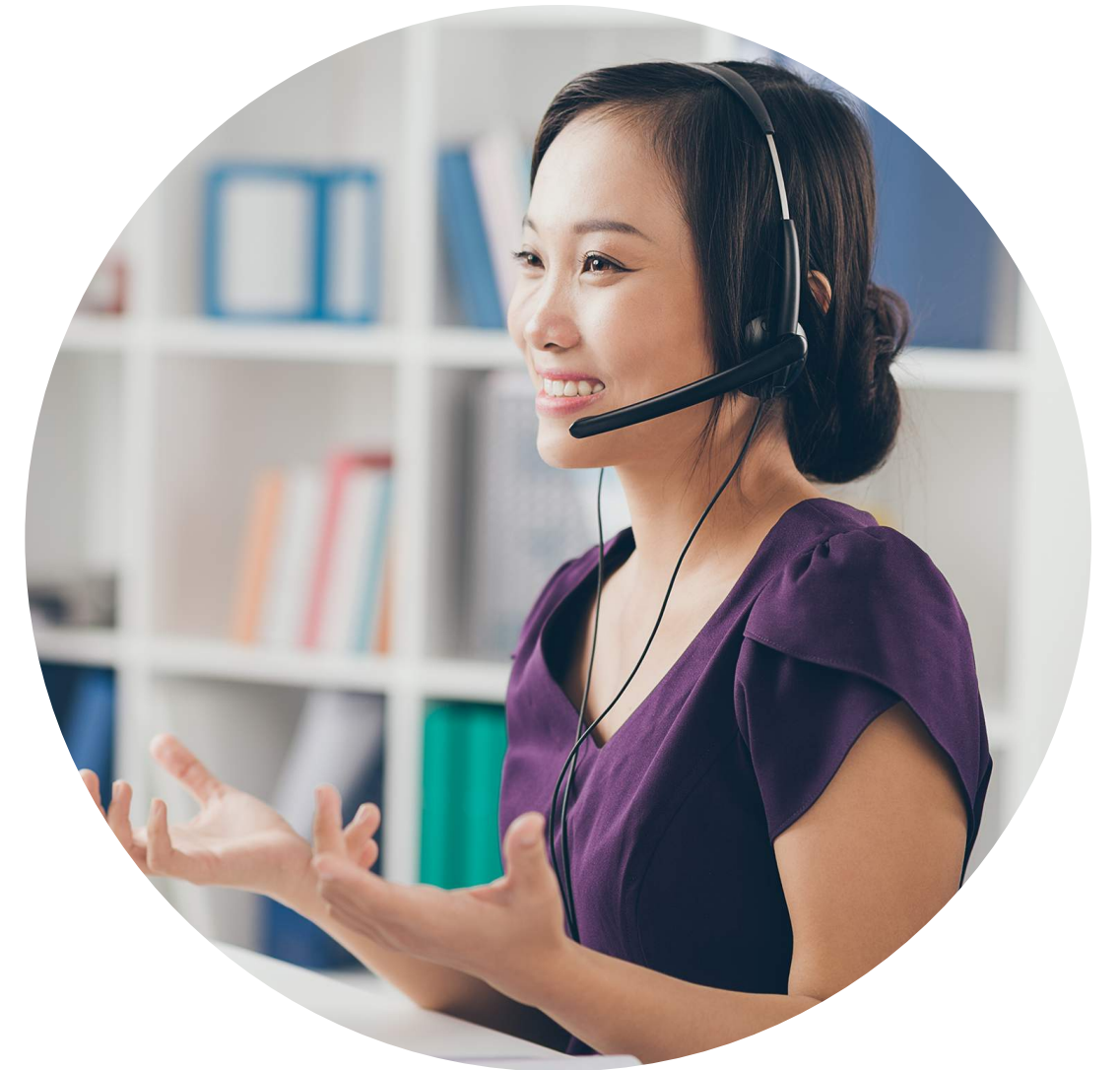
We knew that this was a tool that would do something quickly for us, we were able to build on top of PDFfiller very quickly and so it worked. We operate very much like a Startup in that when we need a problem solved right now, we pick the very best thing.

– Chris Johnson, CTO, Crisis Text Line

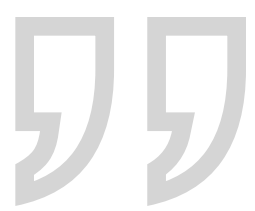
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Easy Customization



As an organization with in-house technical capacity and a creative, do-it-yourself mindset, it was important to Crisis Text Line to identify a technology that was easy to work with. They were particularly drawn to PDFfiller for its flexibility and the minimal time and effort investment required to get a system ready to go into production.



PDFfiller Support has been extremely responsive to each of my requests, usually responding back within an hour or two of me reaching out, each time with responses that have succinctly answered my quandaries.

– Toshiro Kida, engineer, Crisis Text Line



Responsive Technical Support

PDFfiller's technical support team is committed to working with Crisis Text Line to come up with solutions that meet their needs, in particular a secure and simple authentication mechanism. In providing assistance with this feature, and during the overall onboarding process, PDFfiller was able to respond to the needs of Crisis Text Line quickly and efficiently.

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PDFfiller for Crisis Text Line: Building a Better Solution



As Crisis Text Line's team of volunteers grows, PDFfiller can help them respond to new automation challenges. While their current application is fairly simple - filling and retrieval of PDF certificates - the feature set of PDFfiller's API will allow for the automation of other document management workflows as the need arises.

More importantly, PDFfiller is already positioned to meet the needs of organizations that work with other kinds of online business management tools. Crisis Text Line currently plans to use Salesforce as a customer relationship management tool. CTO Chris Johnson was excited to learn that a PDFfiller Salesforce app already exists that allows Salesforce users to easily edit, redact and sign PDF documents without ever leaving the Salesforce platform.

According to Crisis Text Line, the graduation and recognition certificates play an important role in recruiting, as well as creating a unified and proud volunteer network. The application of PDFfiller's API for certificate creation is a reflection of Crisis Text Line's belief in using data science and technology to make crisis intervention faster and more accurate. Working with PDFfiller is making it easier for Crisis Text Line to recognize volunteer excellence, which in turn is helping Crisis Text Line build better solutions to support those in crisis.