ZOHO Creator

The Uphill Battle
to Make a Difference

How a legal non-profit firm transitioned
from spreadsheets to custom apps,
dramatically boosting productivity and
simplifying data management.

zoho.com/creator

INDEX

1.

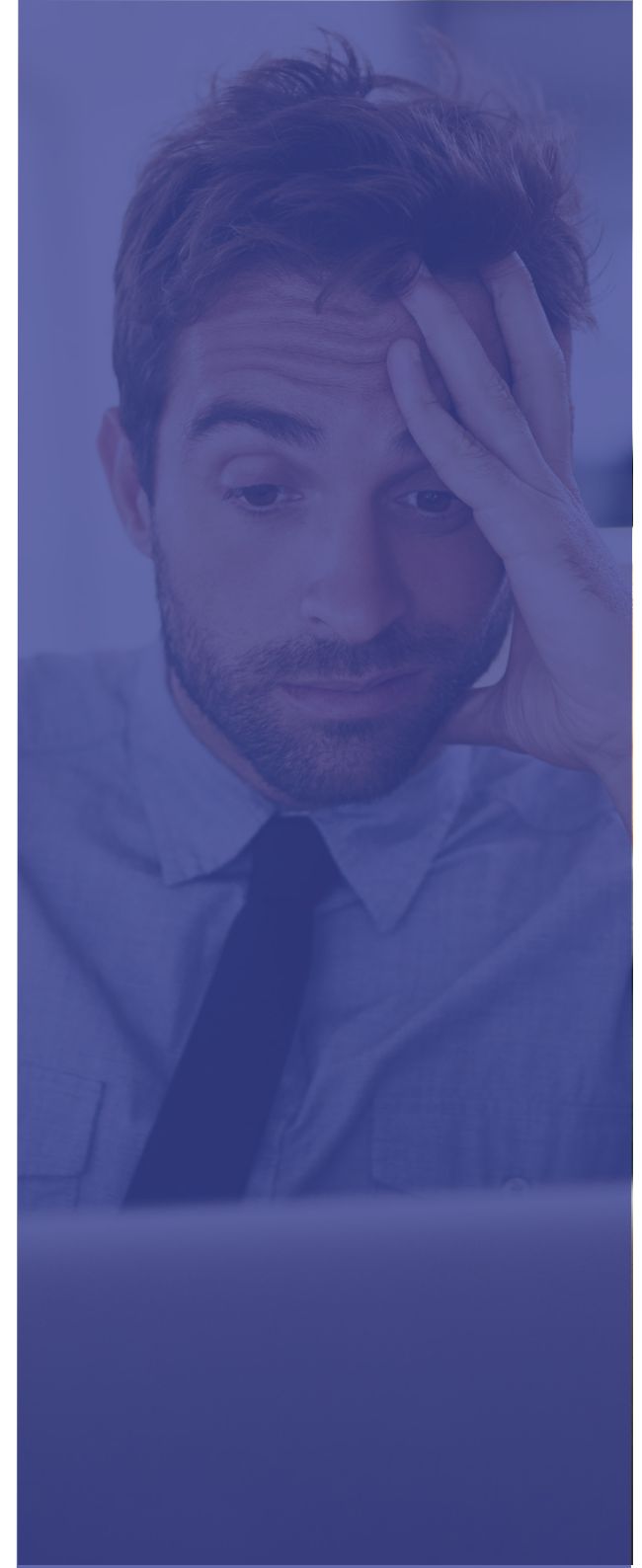## THE CENTRE FOR VICTIMS AND HUMAN RIGHTS

In the US alone, reports show that every minute, 24 people experience some form of domestic violence. The lack of legal and financial support renders underprivileged victims helpless, preventing them from seeking justice. In an effort to make judicial assistance readily accessible to them, Raio Krishnayya founded the Centre for Victim and Human Rights (CVHR) in the city of Indianapolis. Notably, CVHR is the only non-profit organization in the entire state that offers legal services, and handles litigation against crimes ranging from domestic battery to human trafficking.

2.

WHEN SPREADSHEETS JUST DON'T CUT IT

Most non-profit organizations rely on spreadsheets to manage their data because they're easy to handle and less expensive than packaged software. However, in the long run, spreadsheets tend to cause more problems than they solve. After four years of relying on MS Excel to manage everything from client data to donor information, CVHR realized the flaws in their system. Though they had all their data in a single place and updating information seemed convenient, spreadsheets became very cumbersome to use as their organization grew.

They tried MS Access, but it wasn't the best choice either. The CVHR team had to hire an IT consultant to develop their database application. In a non-profit, every additional expense tends to add up rapidly, and that proved to be a very undesirable side effect. The approach was quickly scrapped, and spreadsheets continued to be the data management system of choice at CVHR.

> ❝
>
> We used Microsoft Access too, but found it to be both difficult to customize to our needs and unwieldy.
>
> **Raio Krishnayya**
>
> Founder & Executive Director

Here's why CVHR found spreadsheets ineffective:

An excess of data:

In no time, CVHR gained recognition for its services, and more victims began reaching out to them. With that came a lot of client details to handle. In some cases, they had spreadsheets with more than a hundred columns and thousands of rows. When an employee needed to access information pertaining to an ongoing case, they had to sift through multiple spreadsheets and paper documents. The team realized that they needed a tool that would help them work more efficiently, and minimize the amount of drudge work that had to be done.

Susceptibility to human error:

There's no doubt that spreadsheets are the simplest tool for number crunching and reporting. However, there's always the probability of an operator entering incorrect information that can lead to serious miscalculations and distorted worksheets. For CVHR, this was a major conundrum. They followed a data collection process that relied on a simple logical model. The data was highly dependent on the person collecting it—from the time a case was initiated, up to its closure. There was no uniformity in the information entered, because every team member entered it in a different way. For instance, dates could be entered in various formats. Every time a new person took over the case, they had to be trained to follow the existing format to ensure consistency.

Rigid sharing protocol:

Spreadsheets are shareable, but they aren't the best tools when it comes to controlling data access based on job role. As CVHR dealt with sensitive client information, it was vital that the information remained confidential to a certain degree. Everyone involved had to see some of the data, but not all of it, so several versions of a report had to be created.

For example, while both board members and funders sometimes required overlapping information, certain details had to remain classified from both parties. Two separate versions of the same report had to be created—leading to duplication of effort and significant time wasted. Besides, locking a worksheet or cells in a spreadsheet could merely keep the user from changing the structure or the formulae, not from viewing them.

> First, we needed a tool that would allow consistency in data collection regardless of the user and their experience in the organization. Second, we needed a tool that would be customizable.

Raio Krishnayya
Founder & Executive Director

3.

IN SEARCH OF A CUSTOMIZED PLATFORM

Recognizing the pitfalls of using spreadsheets and MS Access, Raio began looking for a more robust solution—a solution that would be flexible enough to cater to their needs. They needed a tool that would:

- Ensure data consistency, regardless of who entered it into the application.
- Enable them to customize elements of the application.
- Offer the flexibility to share data and restrict access based on job role.
- Allow them to download the recorded data and share it with the organization's stakeholders.

4.

THE PERFECT SOLUTION

A quick web search led Raio to Zoho Creator, and he decided to give it a try. In a few months, he had four fully-functional apps up and running that did everything the spreadsheets could do, and then some. CVHR's four apps were centered around an ordered database that had operational intuitiveness, and yet, provided detailed dashboards for information analysis.

> **"**
>
> Zoho Creator has impacted our success in a very positive way, specifically in reducing the time it takes to collect and record data, as well as making relevant data more easily accessible.
>
> **Raio Krishnayya**
>
> Founder & Executive Director

These are the apps they built:

Case Intake Tracker:

This app was used to record new clients' details and their respective cases once a judicial process was undertaken on their behalf. With drop-down menus, radio buttons, and auto-populating fields, the app minimized the manual effort required to fill it, while making the intake process quick and easy.

Finance Tracker:

An all-encompassing financial hub, this app had two main functions: to handle daily spending, and to manage and analyze annual budgeting. Monthly revenue calculation was completely automated, with it's functionality being extrapolated to estimate annual revenue as well.

Grant Tracker:

This app served the sole purpose of tracking incoming federal and state grants. It was configured to automatically calculate the amount of funds to be requested, based on periodic spending and grants already received from the source.

Legal Issues Tracker:

CVHR handled a wide variety of cases, some of them dealing with crimes across several categories. Since these issues took several months to settle, and often more than one attorney, the specifics of each case had to be carefully registered. Using features like custom actions and conditional formatting, the proceedings could be recorded on a calendar-themed report, color-coded by progress, and declared closed at the click of a button.

5.

RESULTS DELIVERED

Raio and his team instantly took a liking to the apps they built and the functionality the platform offered. Four years and four apps later (with more in the works), CVHR has come to trust in Zoho Creator to manage its day-to-day data handling operations, and are one of our happiest customers to date. Here's what they achieved:

Higher Productivity:

Zoho Creator gave them a powerful data analysis tool, allowing staff members to constantly monitor specific details, ranging from case progress to spending, using dashboards and live reports.

Complete Mobile Functionality:

With Zoho Creator's ready-to-use mobile app, case details could be recorded in real-time—even as legal proceedings unfolded in court.

Optimized Time Management:

Standardized data entry and customizable reports made retrieving and modifying records faster—speeding up administrative processes and saving valuable time for employees and clients alike.

Minimized Manual Error:

Adding data validation, embedded scripts, and dynamic drop-down menus to forms resulted in fewer trivial errors and consistent record-keeping.

Flexible Collaboration:

Using role-based access control, board members and funders were shown detailed or brief versions of the same report, eliminating the need for two separate documents to be compiled.

"I would describe Zoho Creator as an essential business tool...If there are better ways of building databases and tracking data, I haven't found it."

Raio Krishnayya

Founder & Executive Director

> Zoho Creator is amazing! It has helped us deploy apps that help us communicate with our volunteer network, and gather data in a fast and streamlined process.

Sanjay Thomas

Director (IT), MAD

> All the logistical complexities of this event, we're able to support with Zoho Creator. We're doing something fun with it, and enjoy doing it each November here in beautiful Napa Valley.

Marc Lhormer

Executive & Artistic Director

Napa Valley Film Festival

> We chose Zoho Creator simply because of its simplicity, flexibility—and it's cloud based.

M.K.Sriram

VP Operation

Saahas Zero Waste

About Zoho Creator:

Running an organization is no mean feat, and we believe we can help. Rapidly build custom applications that are a perfect fit for your needs, or choose from our extensive range of pre-built apps and modify them. The best part? You don't have to be a programmer. Just sign up, pick a plan, and start building!

Great brands that trust us:

We'd love to talk! Reach out to us:

sales@zohocorp.com

US : +1 877 834 4428

UK : +44 (20) 35647890

Australia : +61 2 80662898

Spain : +34 918368598

India : +91 (44) 71817070