





IRIS Reduces Support Demands by Using MadCap Software to Deliver Content via Salesforce® and Web-Based Help Centers Linked to a Central Hub



Exponentially Speed Up the Process of Migrating Projects

 iris.co.uk

 Slough, United Kingdom

Industry: Business Productivity





Goals

- Facilitate customer self-service and reduce demands on IRIS's support team.
- Ensure the consistency of Help content available on the web and in Salesforce Service Cloud.
- Maximize the content team's productivity by streamlining content creation.
- Facilitate collaboration among IRIS content designers and SMEs.

Solutions



MadCap Flare native XML single-source, multi-channel content authoring software



MadCap Central for content management, collaboration and analysis



MadCap Connector for Salesforce for publishing MadCap Flare content directly into Salesforce

Benefits

Reduced Support Demands

A central Help Hub that links to all IRIS product Help Centers, all built with MadCap Flare, provides customers with a modern web experience for easily navigating to the information they need.

Consistent Content

MadCap Connector for Salesforce and MadCap Flare provide IRIS with single-source, multi-channel publishing to both its modern web Help Centers and Salesforce Service Cloud with a consistent look-and-feel.

Streamlined Content Creation

Using topic-based authoring, conditional text, snippets, variables, search-and-replace, and templates in MadCap Flare speed the delivery and maintenance of Help content for 25 IRIS products.

Easier Collaboration

MadCap Central facilitates collaboration by letting the content team provide SMEs with empty topics to add their content, which can then be easily reviewed and edited.

IRIS Software Group



For more than 40 years, IRIS Software Group has supplied innovative administrative business productivity solutions to businesses, charities and the public sector. Over 120,000 organizations worldwide—from companies on the Financial Times Stock Exchange 100 Index to micro-business—now rely on IRIS to improve their productivity, compliance and engagement.

To help customers make the most of its business solutions, IRIS delivers modern web-based Help for 25 different products and cloud-based solutions that can be accessed via a central Help Hub portal. Today, IRIS relies on MadCap Software to deliver this Help. MadCap offers a complete solution supporting the entire content development lifecycle. It features MadCap Flare for single-source authoring and publishing; MadCap Central for cloud-based content collaboration and analysis; and MadCap Connector for Salesforce for publishing MadCap Flare content directly into Salesforce.

Standardizing Help in Salesforce® and on the Web

IRIS has built its extensive product portfolio through a combination of acquisitions and organic growth. For years, the company's content experts relied on different authoring tools to create its various online and print Help guides. Not only did this limit the IRIS team's ability to reuse content; it also meant that customers using multiple products would have to track down the right Help guide to find the information they needed.

"We had a range of tools and lots of different ways of publishing, authoring, and for customers to consume content," noted Caroline Boyle, head of content design at IRIS.

"So, we began to ask, 'How can we do a better job of producing content and giving customers a nicer experience across all of our products?'"

At the same time, IRIS had started moving more of its software offerings to the cloud, including solutions tied to the Salesforce platform. So, the company wanted a single-source publishing solution that could deliver content to both its own web-based Help portals and Salesforce Service Cloud.

"Part of the problem was that some of the content simply would not be accessible if you didn't have a Service Cloud license," Caroline explained. "However, getting content into Service Cloud was a complicated manual process involving the product owner, a technical author, and one of our support experts. They would have to create the content; remove screenshots and videos, which Service

The screenshot displays the IRIS Help Hub interface. At the top left, it says "iIRIS | Help Hub" and "Go to IRIS Site". The main heading is "Welcome to the IRIS Help Hub" with the subtext "What area can we help you with today?". Below this is a section titled "Help centres by product" which contains eight cards, each representing a different product category with a brief description and a right-pointing arrow:

- Support**: IRIS Service Community. Need help with your IRIS products? Learn how to create and update cases, search for answers, view case history, and chat with Support.
- Accountancy**: IRIS Accountancy Suite. Integrated accountancy functionality, including accounts production, personal and corporation tax, company formations, and practice management.
- Accountancy**: IRIS Elements. Cloud accountancy platform for automated workflows and AML compliance.
- Accountancy**: IRIS KashFlow. Comprehensive bookkeeping and payroll solutions for accountancy firms and their small business clients.
- Accountancy**: IRIS Practice Engine. Cloud-based accountancy practice management that enhances efficiency and improves client.
- Accountancy**: Senta by IRIS. Cloud-based practice management platform to help accountancy practices be more profitable.
- Accountancy**: Taxfiler by IRIS. Powerful accountancy and tax software that simplifies and automates processes for.
- Education**: IRIS Assets. Manage and provide support for all your devices, equipment, and software.

IRIS delivers modern web-based Help for 25 different products and cloud-based solutions that can be accessed via a central Help Hub portal.

Cloud didn't like, and then manually paste it into the system. There was no way to single-source the content."

The content team's first choice was to standardize on one of the authoring tools already being used. After reviewing IRIS' Help publishing requirements, the company quickly narrowed down its evaluation of solutions from two software solutions: Adobe® RoboHelp® and MadCap Flare, and began working to set up trial versions.



We could not get RoboHelp® to speak to Salesforce® whereas MadCap Flare came with a Salesforce® plugin. That played a big role in our decision to go with Flare.



TRACY MACK
Senior Content Designer,
IRIS Software Group

Before delivering content to Salesforce Service Cloud, the content team reviewed an instructional video from MadCap Software on how to publish content from MadCap Flare to Salesforce and worked with both an IRIS Salesforce administrator and the MadCap Software support team on the initial set-up.

"The MadCap Software video and tech support team were absolutely brilliant in helping us to get the structure right that Salesforce requires for any content," Tracy said. "Now with the set-up in Flare and the MadCap Connect plugin for Salesforce, we literally click a button in publishing, and it's done. We're really happy."

Tracy adds, "One of the major features of the MadCap Connector for Salesforce is that we can say, 'Please use my MadCap Flare styles and not Salesforce's.' This lets us get almost the same look that we have in our Help Center."

Simplifying User Access to Information

To date, IRIS has gone live with Help Centers for twenty-five of its products. Each Help Center is a modern, HTML5-based, responsive website built with MadCap Flare. To access the Help Centers, the content team has also created a "Help Hub" using MadCap Flare. From the Help Hub, users can simply click on an icon to launch the product Help Center they need.

"The Help Hub is our launch pad for all the individual Help Centers that we currently have. So, as soon as we produce another one, it gets added to the Help Hub, and our customers can see it along with the Help for all of our other products," Tracy explains. "Because the Help Hub is based on MadCap Flare, it just looks like another Help Center to our customers."

In most cases, MadCap Flare-based content is being published to both the Help Centers and Salesforce Service Cloud. Additionally, some Salesforce articles point to the Help Center as well.

“The Help Hub and the ability to get information from both our Help Centers and Salesforce has been really powerful in terms of internal knowledge sharing and the customer experience,” Caroline observes. “I’ve had feedback from colleagues who have said, ‘Where has this been? If only this was available to learn about the products when I joined IRIS.’ Our Flare-based Help has been a massive step forward for us in making our content more accessible.”

The fact that MadCap Flare content is searchable has enabled IRIS to utilize a Gainsight knowledge bot within each application that is pointed to the appropriate Help Center, further simplifying access to information. When a user clicks on the icon for the bot in the application, the knowledge bar opens up and then conducts a Google search of the Flare-based Help content. Then, once the user clicks on the result, the bot jumps them straight to the Help Center.

“The ability to provide access to our Flare-based Help Centers from knowledge bots in our applications is invaluable,” Tracy says. “It gives us one more way of enabling customers to easily access the information they need.”

The screenshot displays the IRIS KashFlow Help Centre interface. The left sidebar contains a navigation menu with categories such as 'Release information', 'Getting started', 'Common functions', 'Manage your account', 'Dashboard', 'Banking', and 'Purchases & payments'. The 'Banking' section is expanded, showing options like 'Set up your bank accounts', 'Add or edit bank account', 'Create a bank loan account', 'Create a credit card account', 'Create a cheque clearing account', 'Connect your bank account (bank feeds)', 'Record bank transactions', 'Record bank transfers', 'Record and manage bank loans', 'Record and manage credit cards', 'Record and manage cheques', 'Record and manage retail / cash sales', 'Record and manage petty cash', and 'Bank reconciliations'. The main content area is titled 'Add or edit bank account' and includes instructions: '1. Go to **Bank** and select **Add New Account**.', '2. Enter a **Name** for the account.', and '3. The **Account Code** is the code that you want to use in your chart of accounts. This'. A screenshot of the 'New Bank Account' form is shown, with fields for Name (Barclays Business), Account Code (69400), Item (None), Start Balance (0.00), Reconcile Date (07/12/2021), Lock Date (07/12/2021), and Payment method for Sales Invoices (Bank Transfer) and Purchases (Cheque).

MadCap Flare-based content is being published to both the Help Centers and Salesforce Service Cloud.

Maximizing Team Productivity

IRIS has placed a priority on giving customers a modern web experience. So, the content team and the company's user experience (UX) designer used cascading style sheets (CSS) and JavaScript to create a skin and design for the MadCap Flare-based Help Centers that were visually attractive and on brand. The team has then relied on MadCap Flare's functionality for saving projects as templates in order to create new projects. In this way, IRIS can ensure that every Help Center will have the same look and feel.

"It was really important for us to make sure that our Help Centers were beautifully designed," Caroline noted. "Now we have an out-of-the-box project, which has the skin and the destination set-up, so new members can quickly spin up a Flare-based Help project and output to a Help Center. The time we've reduced to spin up a new Help Center is significant."

Search-and-replace has enabled us to exponentially speed up the process of migrating projects to MadCap Flare.



TRACY MACK
Senior Content Designer,
IRIS Software Group

IRIS relies on several other features in MadCap Flare to increase the content team's efficiency:

- Snippets enable content designers to repurpose commonalities within an individual product, as well as functions or processes that are shared across more than one product.
- Variables allow the team to easily update product names when they change.
- The search-and-replace feature helps the team to quickly remove unwanted styles from files imported into MadCap Flare.
- Track changes and annotations capabilities enable senior content designers to provide feedback to newer colleagues.

"Search-and-replace has enabled us to exponentially speed up the process of migrating projects to Flare," Tracy observes. "Meanwhile, we can use a combination of track changes and annotations in Flare to provide some one-on-one coaching to newer team members during the editing process."

IRIS' content designers have also been able to maximize productivity by making extensive use of conditional text in MadCap Flare. For example, the team uses conditions to indicate whether content is ready for staging or ready to go live.

"Using conditions and targets in Flare, we can build a staging version at any point. So, I can take functionality that hasn't been released yet and start taking screen grabs and writing the content," Tracy explains.

Currently, IRIS hosts most staging versions of its Help Centers on its staging server.

However, there are also occasions when the team will build a site on MadCap Central to host the staging there.

MadCap Central for Collaboration and Analytics

The cloud-based MadCap Central solution serves as a strategic internal resource. The content team hosts a content design playbook on MadCap Central as a live site, and they take advantage of user permissions to control access.

“We really like that MadCap Central lets us publish a site live and prevent it from being searched and at the same time makes it

really easy for our internal customers to find that website by providing them a link to it,” Tracy explains.

IRIS also takes advantage of MadCap Central to facilitate collaboration with subject matter experts (SMEs) and content designers. While this collaboration occurs on a daily basis, some of the greatest efficiencies have been realized during major migration projects that might mean moving 60 to 70 different PDF files—with each running anywhere from 2 or 3 pages to 30 or 40 pages—into a MadCap Flare project for a new Help Center. On one hand, multiple content designers can each take a portion of the files to review and edit, speeding the process. On the other, migrations often lead to the discovery of gaps in information; with MadCap Flare, the content team can simply provide an SME with an empty topic to add the needed content.

IRIS Elements Help Centre Search [Go to Help Hub](#)

Hi, how can we help?

Help area

- [Getting started / general](#)
- [Manage your practice](#)
- [Practice and client compliance](#)
- [Tax management](#)
- [Accounts production](#)
- [Set up and administration](#)
- [Help by product](#)

What's new

Take a look at [what's new](#) including the new features and improvements we've made, together with what's coming soon.

What's hot

- [Change your password](#)
- [Personalise your Home page](#)
- [Add other users to your IRIS Elements account](#)
- [Manage your product subscriptions](#)
- [Add clients or prospects](#)
- [Anti Money Laundering \(AML\)](#)

Product updates
Find out what's new, what's coming and what's fixed, together with any known issues. →

Getting started
An overview of the software and how to get up and running. →

Get support
Need more help? Contact us using our IRIS Support community. From there, you can search for information, raise a support case, or chat with an expert. →

Explore IRIS
Like what you see? Find out what other products and services we offer by visiting our website. →

IRIS delivers modern web-based Help for 16 different products and cloud-based solutions that can be accessed via a central Help Hub portal.



“Being able to provide SMEs from the product teams with empty topics using MadCap Central has put the control back in our camp. We can easily check to make sure it is grammatically correct and conforms to the style and standards of our existing content,” Caroline observes. “We also now have several excited and engaged product owners and managers, who are seeing the value of having a Help Center that is publicly available and enables customer self-service.” Finally, IRIS takes advantage of MadCap Central Analytics to understand how customers are using the Help Center content and whether their searches for information are successful.

“The Analytics in MadCap Central is something we use a lot,” Tracy notes. “It gives us very succinct and clear information about where we get searches and where there are no search results. We can also see what topics are being hit on a frequent basis and those that necessarily aren’t being looked at, which can help us assess which topics are still needed.”

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TRACY MACK
Senior Content Designer,
IRIS Software Group

Tracy adds, “The fact we’ve been able to implement so much with MadCap Central and Flare is a real testament to MadCap Software’s platform. It is comprehensive but not complicated, and we are very happy about what we have been able to accomplish.”

Get Started on a Free-30-Day Trial
Today at [MadCapSoftware.com](https://www.madcapsoftware.com)

