

**Enhancement in old salesforce
CRM module** for better support
knowledge and solutions among
several charity organization



CARING
AND
CARING



CHARITY



Our Customer, is a national umbrella and capacity-building organisation with over 7,000 members UK-wide. They help trustees, staff and volunteers of small charities access the skills, tools, and information they need to get going and do what they do best.

What bothered them

To date the application has met the most basic business needs of the customer and proved to deliver good value. However, the customer has a clear ambition to grow its member base and provide higher quality and more responsive services.

- A number of custom objects were designed and developed to meet the customer requirements that, on reflection, could have been setup using standard objects. Poor use of custom objects can lead to longer term maintenance challenges and, in certain cases, limit the choice of 3rd party applications available to support potential and longer-term needs.
- A significant level of administration can be involved with searching for the right content and/or resource(s) that a service request needs. This activity can absorb considerable time and resource – and, hence, inherent costs. Further growth of the CUSTOMER membership base will inevitably introduce even higher demands on existing resources.
- To support its future ambitions, the CUSTOMER wish to introduce a tiered membership structure that requires members to pay for certain high value services. This potentially will involve collecting financial contributions in some form. The current application does not currently support any such mechanisms.
- Apart from the above points they have several issues with the existing third-party apps like Eventbrite.
- They want to develop a Partner community in to their existing salesforce for better support to their connected charities.
- One of the key issue that they are facing is Member registration and lightning component used on their existing community pages.

The CUSTOMER therefore need to invest in extending the solution to address the above noted challenges, so that it has a more flexible and scalable platform to support its future needs.



What we did

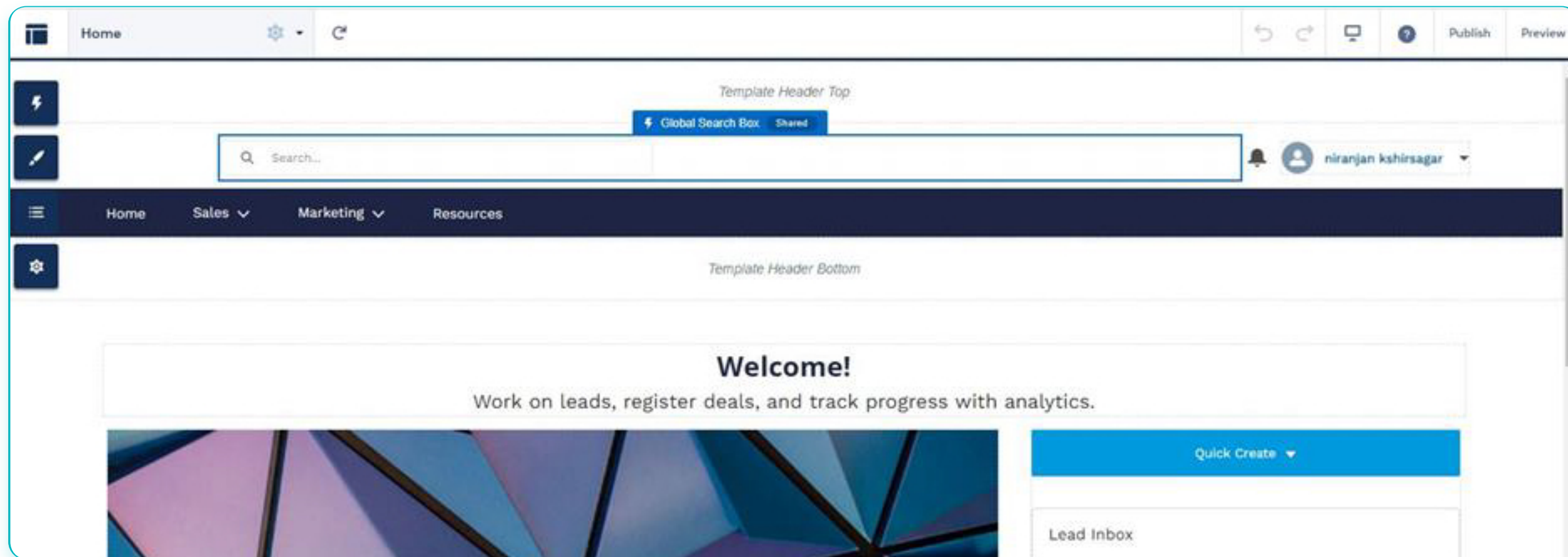
- We offered them a system in Salesforce having some standard as well as custom module/objects such as:
 - Accounts (Charity)
 - Contacts (Charity Members)
 - Case Management
 - Partner community
 - Knowledge Hub (Resource Hub)
 - Logged In Member Area (LIPA - Dashboard)
 - Member Map
- We have also provided them a better way to handle custom objects and use those in partner community.
- We also provide them better solutions in the administrative tasks.
- As we have daily discussion with CEO of the Company John Barret, to know the issues and problems they are facing in their current system.
- Most of the modules are conceptually developed but not yet implemented.
- We have worked on these modules and fulfil their requirement.



Value we offered

- Most of the work is with the Partner Community to build pages using Lightning components.
- We have provided them facility to add content in the lightning component so that they can use the component anywhere throughout the community.
 - We have also guide them to create pages in the community builder.

Fig: Community Builder UI



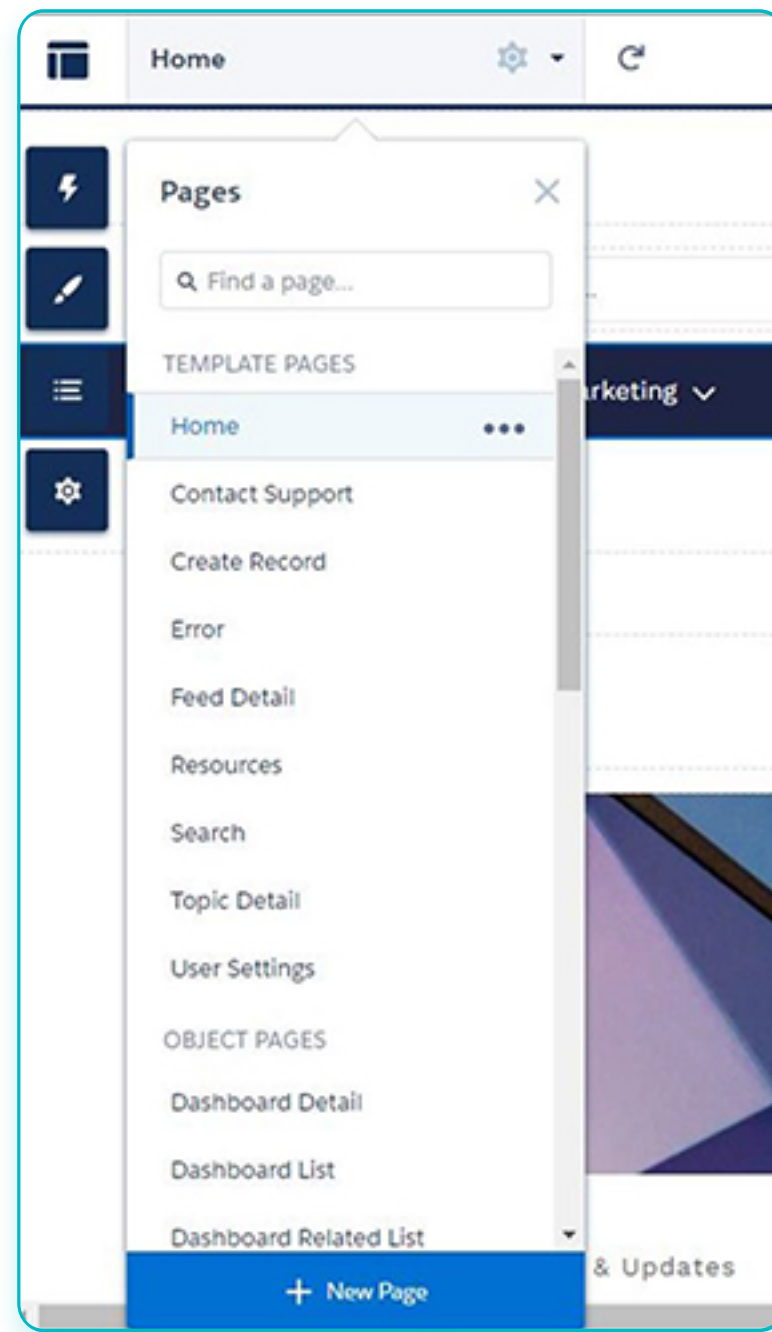
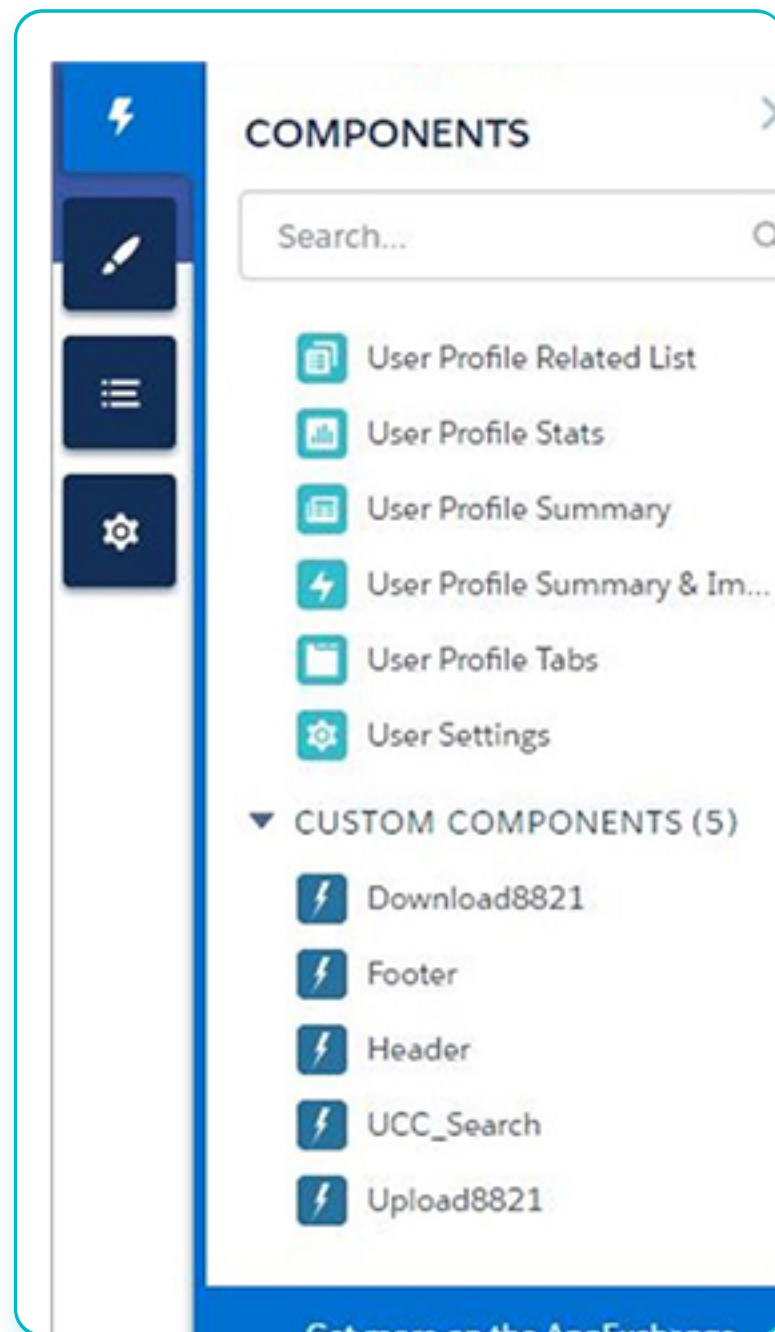
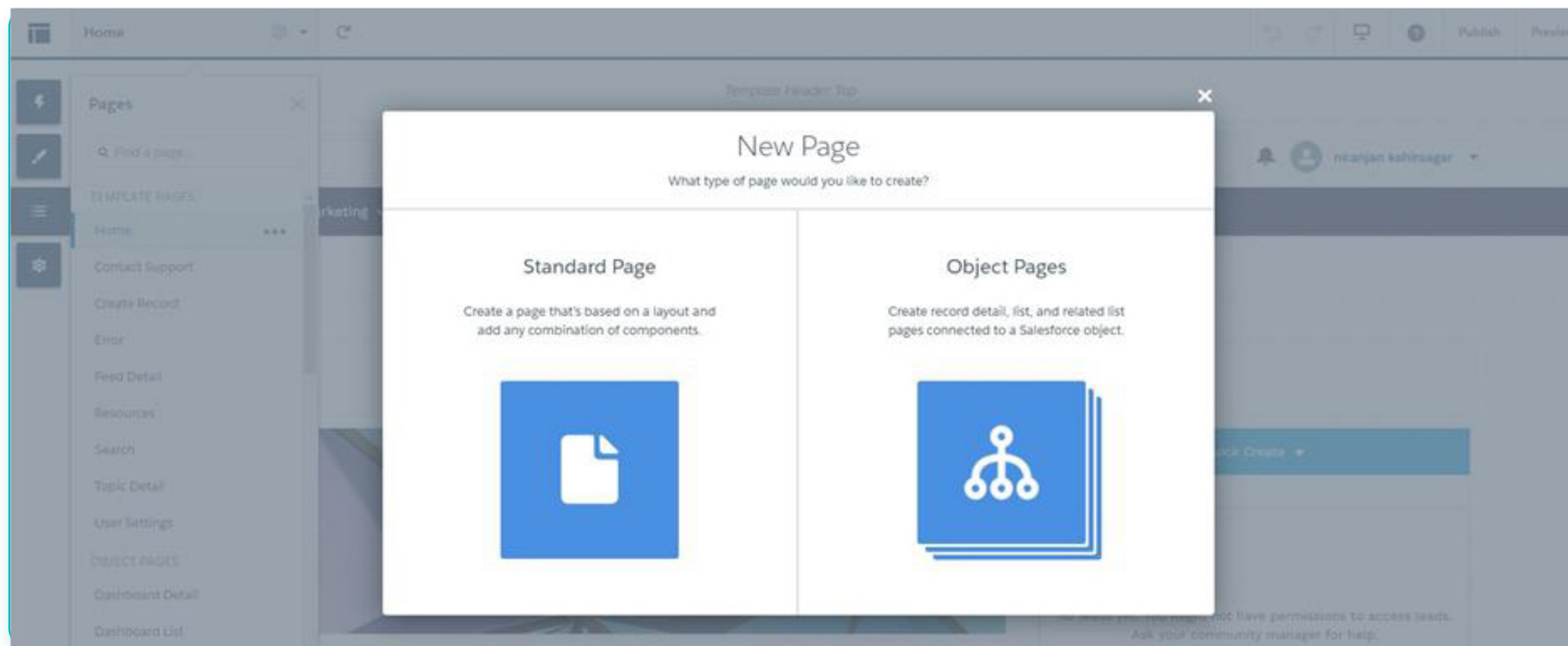
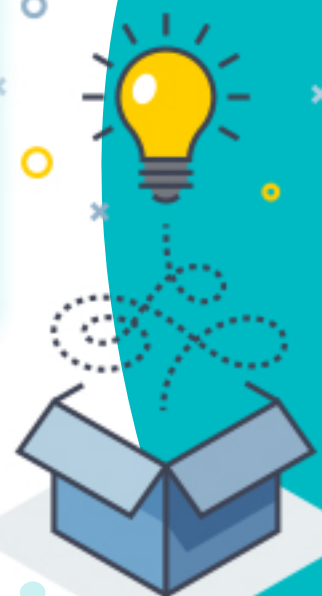
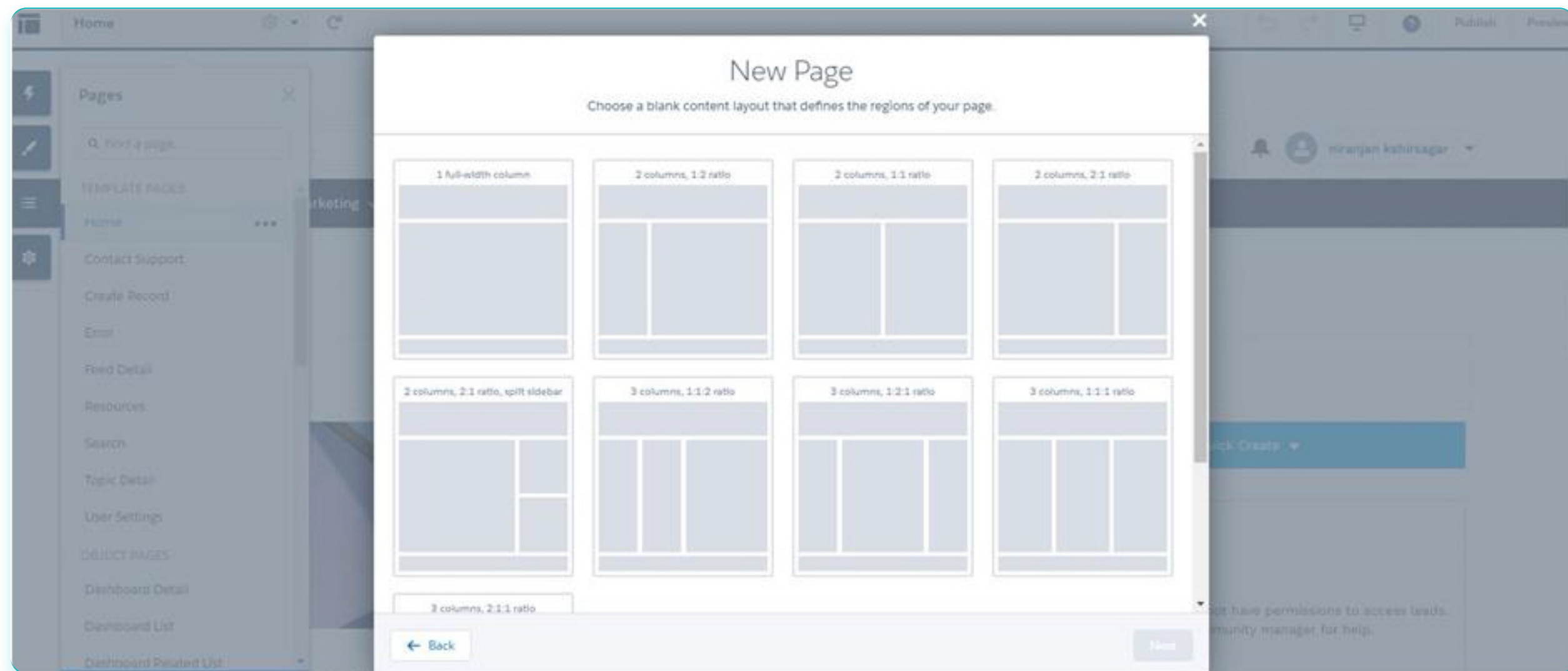


Fig: Our custom component list will be shown in component menu. User just need to drag and drop the component from list on to the canvas.

Fig: New Page creation in community
To create a new page. Click on '+New Page' >> Select the template (Standard/object page) >> and finally, select the layout.







Using custom Lightning components, we have achieved most of the modules as follows

- Member registration
 - We build a lightning component which work like a widget as there are several steps to complete the registration.



1 2 3 4

Billing address

Filled marks with * are mandatory

First Name^{*} Last Name^{*}

Contact number^{*}

House number (or name) & Street^{*}

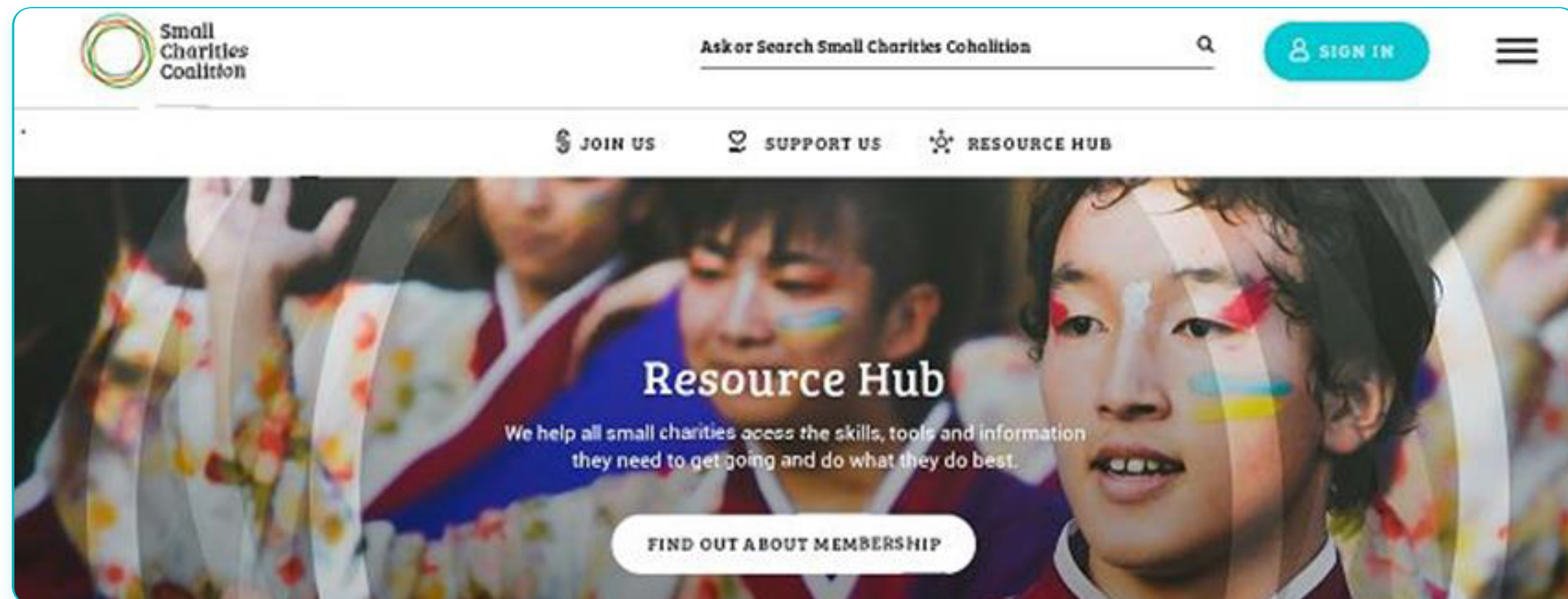
Town or City Country

Post code^{*}

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- Member Map
 - We have successfully developed this module to display the accounts (Charities) on map, so that user can find the charity nearby their location.
 - User can also get connect with the charities within this module.
- Resource Hub
 - In this module we have manage to show all the knowledge related articles and information
 - We have created this page with combination of several lightning components as shown below

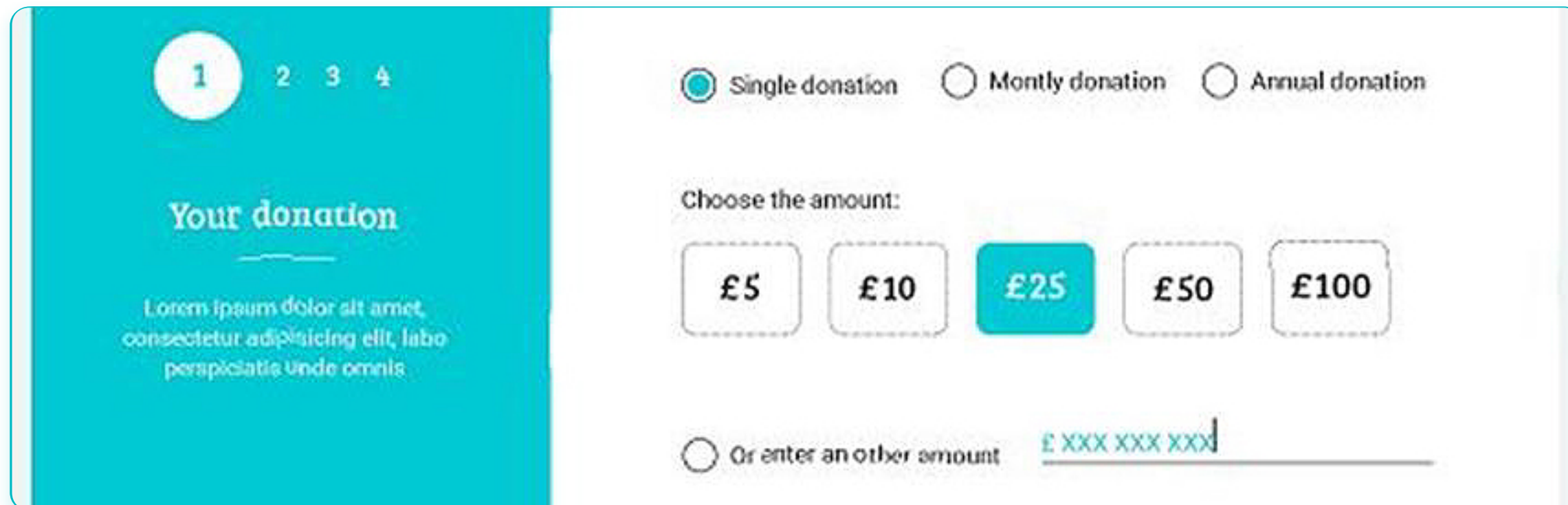


- Search functionality in Resource Hub
 - Using this module user can easily search the knowledge article for help and support



- Logged In Member Area (LIPA - Dashboard)
 - After login to the community, user can easily get the related details to manage their profile, charities, chatter groups, etc.
- Static Pages
 - With the capability of lightning component, we have provided a solution to build static pages in easy way.
 - Having lightning component from which they can add content with consistent design and functionality to create static pages.
 - Below are some examples of such lightning components

Fig: Left side Image & Right Side contents



The image shows a donation form interface. On the left, there is a teal sidebar with a navigation menu containing four items: '1', '2', '3', and '4'. The first item '1' is highlighted. Below the menu, the text 'Your donation' is displayed, followed by a line of placeholder text: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit, labor perspicatis unde omnis'. The main content area on the right is white and contains the following elements: three radio buttons for 'Single donation' (selected), 'Montly donation', and 'Annual donation'; a section titled 'Choose the amount:' with five buttons for £5, £10, £25 (highlighted), £50, and £100; and a radio button for 'Or enter an other amount' followed by a text input field containing '£ XXX XXX XXX'.



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First Name*

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Town or City

Country

Post code*



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1 2 3 4

Billing details

With concerns about your security
of financial data we want to
reassure you that we are working



Card payment

VISA



VISA



VISA



paypal



Card number

Lorem Ipsum

