Developing a community portal for a non-profit organization, using **Salesforce CRM to manage, support and help small charities in England**

About our customer

Our customer, an England-based non-profit organization, existed to 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. It is a national umbrella and capacity-building organization with over 10,000 members. Its services included:

- Matchmaking small charities with other organizations to increase resources or improve knowledge and skills.
- Running a training workshop programme tailored to specifically upskill small charities.
- Providing support, guidance, encouragement, advice, and information to small charities.
- Providing personal development opportunities for individuals who volunteer to help small charities.
- Offering a resource for small charities to get their voices heard within the media and Government.

What bothered them

This non-profit organization had implemented Salesforce CRM. However, there were a lot of lurking issues in the workflows and overall design of the Salesforce org. Managing the entire operation manually was sure time-consuming for all the employees of this non-profit organization. Also, they had a clear ambition to grow their member base and provide higher quality and more responsive services.

- Several custom objects were designed and developed to meet the requirements that on reflection could have been set up 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 needed to be involved to search for the right content and/or resource(s) that a service request needs. This took considerable time and resources – and, hence, increased inherent costs.
- To support its future ambitions, they wished to introduce a tiered membership structure that required members to pay for certain high-value services. That potentially could involve collecting financial contributions in some form. However, their current application did not support any such mechanisms.
- They also faced several issues with the existing third-party apps like Eventbrite. Managing member registrations was another key issue.
- They wanted to develop a Partner community in their existing Salesforce CRM for better support to their connected charities.

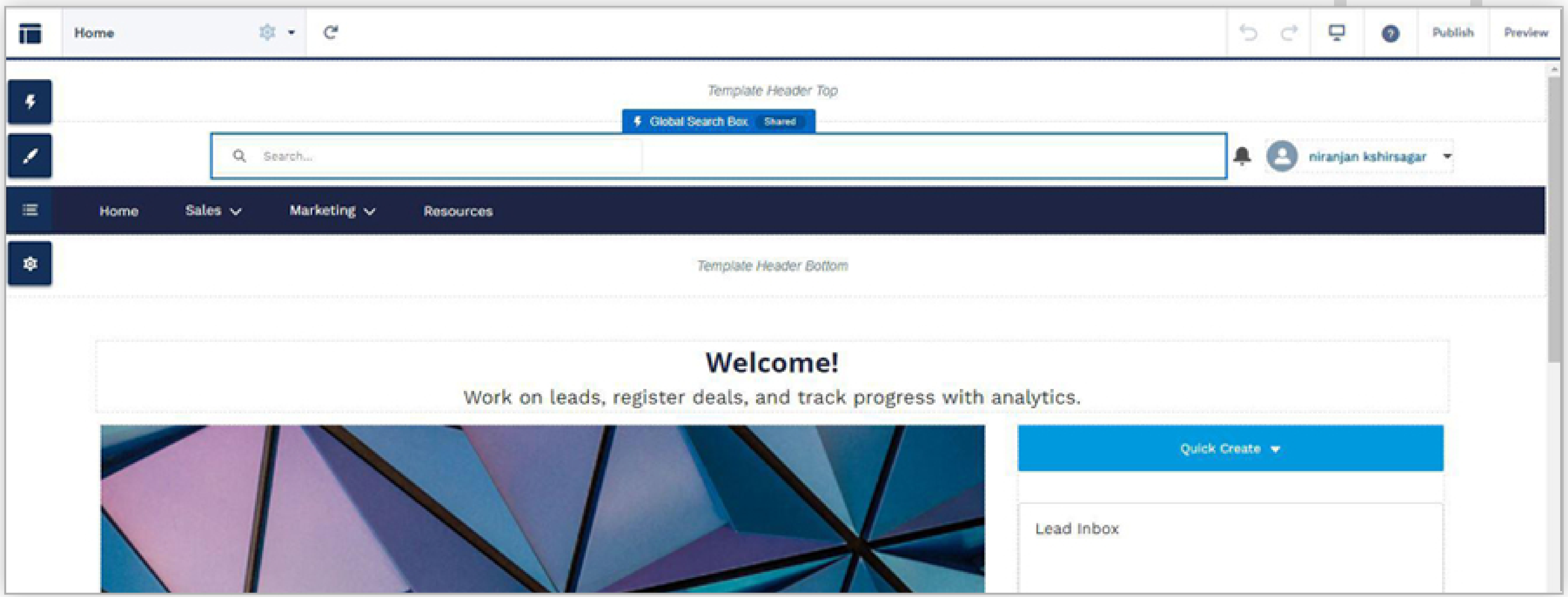
aress
Technology that Impacts Business

What Aress Software did

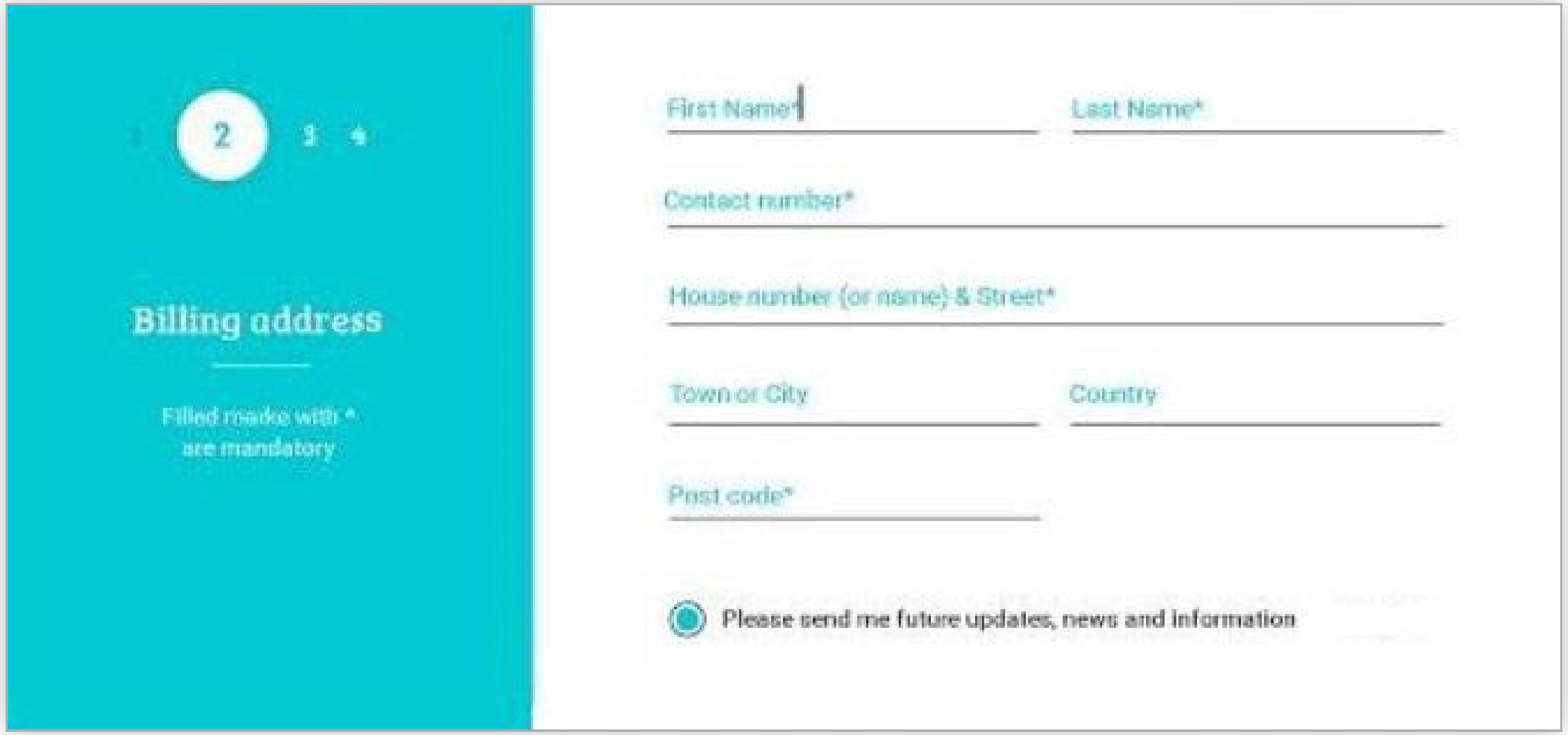
- Arranged discovery sessions with their management team and key end users. That helped Aress Team in knowing the problems better and working on the proposed solution faster.
- A system in their Salesforce Org was built by Aress to manage some standard as well as custom objects/modules such as:

✔ **Accounts (Charity)**
✔ **Contacts (Charity Members)**
✔ **Case Management**
✔ **Partner community**
✔ **Knowledge Hub (Resource Hub)**
✔ **Logged In Member Area (LIPA - Dashboard)**
✔ **Member Map**

- Provided them with a better way to use these in Partner Community.
- All the modules were conceptually developed and implemented using the Out-of-the-box Salesforce features.
- Created an administrative dashboard to manage all the tasks.

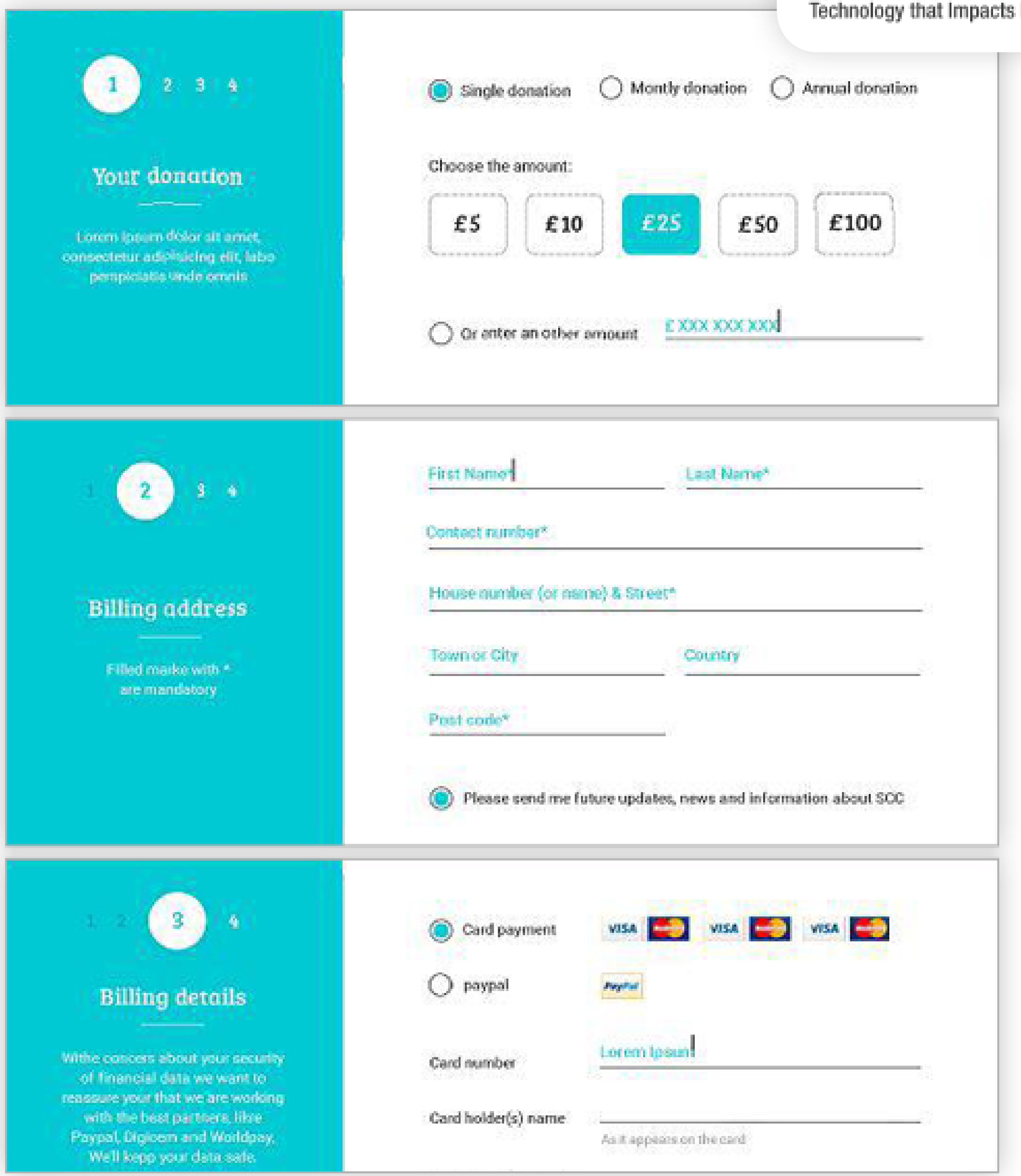


- **Member registration:** Aress Team built a custom lightning component that works like a widget as there are several steps to complete the registration.



- **Member Map:**
  - Aress Team successfully developed this module to display the Accounts (Charities) on Google-map so that users could find the charity organization near their location.
  - Users can also connect with the charity organizations within this module.
- **Resource Hub:**
  - In this module, Aress Team has managed to show all the knowledge-related articles and information.
  - Created this page with a combination of several lightning components.
- **Search functionality in Resource Hub:**
  - Using this module users could easily search the knowledge article for help and support.
- **Logged In Member Area (LIPA - Dashboard):**
  - After login into the community, users can easily get the related details to manage their profile, charities, chatter groups, etc.
- **Static Pages:**
  - With the capability of the lightning component, we have provided a solution to build static pages in an easy way.
  - Having a 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.
- **Donations/Grants Management:**

  In this module, we have provided a widget like structure for donation purposes.
- **Aress Team also provided support to resolve issues related to the integration with Eventbrite application.**



Business value realized by customer

- The new look & feel with the simple interface helped the users to navigate things quickly and complete the tasks faster.
- Most of the work is with the Partner Community to build pages using Lightning components, helping the customer users with a facility to add content to the lightning component to use the component anywhere throughout the community.
- Users can create custom pages for their campaigns in Community Builder and manage it efficiently.