About our customer

Our client is a charitable organization that is dedicated to supporting children and young people who are living with disabilities or facing various challenges in the United Kingdom and Ireland. The organization's primary focus is on providing aid through a variety of initiatives, including sensory rooms, outdoor activities and playgrounds, health and wellbeing programs, and specialized equipment.

What bothered them

✓ The Non-Profit Service Pack was installed but not configured correctly, utilizing standard functionality, and operating in the classic experience.

✓ The organization was using five distinct custom applications, namely Central, Membership & Payments, Projects, Finance, and Regions.

✓ In addition, they expressed a desire to send bulk emails to contacts/campaign members, for which they had Mailchimp installed but was no longer in use.

✓ The organization was utilizing custom objects that could be replaced with standard NPSP objects.

✓ The organization was also utilizing a gift aid custom object, which could be substituted with a Gift Aid Declaration object.

✓ A total of 78 workflow rules and 3 process builders were present in the org, which could be converted into flows.

✓ There was a lack of proper tracking of payments.

What Aress Software did

✓ Migrated Salesforce Org from Classic to Lightning Experience.

✓ Created a single lightning application and utilized more standard objects and out-of-the-box modules.

✓ Optimized the existing implementation and converted existing Workflow and Process-builders into flows.

✓ Configured FinDock (Customer Payment Management solution) to store all the donation-related information within Salesforce.

✓ To allow the customer to manage the funds effectively, Aress team configured the **Grant Management Tool and Recurring Donations Module.**

✓ Configured Engagement Plan to automate and customize a donor type or level-based plans which can be automatically started when a particular level is set.

✓ Created user-friendly landing pages and forms to kick-start the payment experience and deliver a fully integrated payment journey.

✓ Integrated Stripe and GoCardless payment management systems with Salesforce Org.

✓ Migrate existing data maintained into the new Salesforce system.

Value offered by Aress

✓ The users are happy with the new and simple Salesforce lightning interface.

✓ The customer can now manage the payment forms to collect donations/ fee/ payments through this new Salesforce org.

✓ **Grant Management Tool** has simplified the application processes and now the users are able to track and analyze the flow of the funds. It is also allowing the customer to maintain a central repository of funding applications.

✓ **Recurring Donations Module** has been helping to manage revenue from loyal donors and to improve revenue forecasting. Recurring donation allows tracking related Opportunities & their installments and payment status easily.

✓ With the integration of FinDock, it is now possible to capture real-time payment data at any stage, on any channel, using either of the payment systems (Stripe and GoCardless).

✓ Volunteers for Salesforce (V4S) functions is helping to manage the volunteers effectively.
  o Tracking the hours put in by the volunteers.
  o Managing the positions of volunteers and their shifts for ongoing & one-time events.

✓ Newly built dashboards are allowing the customer –
  o to monitor different programs and fundraising efforts.
  o to get information related to all fundraising activities, campaigns, and programs.
  o to do effective decision making.

✓ The customer can now manage all operational activities on one platform built on Salesforce.