



# RE-MODELING THE BUSINESS PROCESS OF A NON-PROFIT ORGANIZATION WITH SALESFORCE NONPROFIT SUCCESS PACK (NPSP)

Suyati provided to end to customization in Salesforce NPSP instance to optimize the business processes of a Non- Government Organization

## CLIENT OVERVIEW

The client is an independent, non-profit animal protection charity based in Sydney, Australia, whose work is focused on raising awareness of animals suffering in factory farming and the kangaroo industry in Australia.

## BUSINESS PROBLEM

Being a non-profit organization and a fund raiser, the client was earlier running on a Salesforce AppExchange based solution called Supporter360, which took care of all the day to day business operations and related workflows. But the product came with a hefty license cost coupled with scalability issues. This triggered the lookout for an alternate solution. The client chose Salesforce Nonprofit Success Pack (NPSP), which offered better price proposition in comparison with the existing setup.

NPSP is an industry-standard Salesforce app that is built exclusively to cater to nonprofit organizations. However, the client wanted an experienced development partner who could recreate the existing business processes/functionalities in Supporter360 app and bring into play a few enhancements and custom functionalities around the same.



## TECHNOLOGY LANDSCAPE

### ► FormAssembly:

FormAssembly is an easy drag and drop web form building tool, which helps in streamlining complex processes and can be used for anything ranging from application process and contact management, to post-event surveys. FormAssembly allows the user to dynamically prefill forms with data from Salesforce and automates complex transactions within Salesforce instance.

### ► Chargent:

Chargent helps to manage payments entirely inside Salesforce. It helps the user in easily processing one-time credit card payments, setting up recurring credit card payments, and integrating every payment with Salesforce.

**FORM ASSEMBLY**

**Chargent**  
PAYMENT PROCESSING FOR SALESFORCE

## SUYATI SOLUTIONS

- We did a good round of customization in Salesforce NPSP instance to ensure the client's business processes were well optimized and easily scalable. The team developed a 'Quick Opportunity' creator functionality using Visual Force so that the Administrator User can manually create Single & Recurring donations directly.
- We provided the most seamless Salesforce integration with FormAssembly, which helped the client in streamlining their donor on boarding process effectively. Since it is a customizable solution, it met the client's data collection requirements with ease.

- We helped them in integrating their Chargent payment gateway with the CRM so that both their one off and regular donation transactions were taken care of seamlessly.



## BUSINESS OUTCOMES

- Cost advantage: Minimal license fee in comparison with the earlier setup
- End to End customization of workflows catering to each of their business requirements in the most efficient manner, which increased user friendliness significantly
- Scalable and future proof architecture
- Custom workflows reduced the manual overheads through intelligent automation

## ▶ TEAM SIZE

- 1 Team Lead
- 1 Business Analyst/PM
- 2 Developers



## ABOUT SUYATI

Suyati is a fast-growing, digital transformation solutions company that helps you rebuild your customer experience for the digital consumer. We collaborate with businesses to strategize and implement impactful digital initiatives that position our clients ahead of the competition. We are digital-first and we focus on delivering digital transformation solutions that support your various engagement strategies. With our niche and rich expertise in a wide range of technologies and services- CMS, CRM, e-commerce, Cloud, IoT, Data Analytics, and Product Engineering- we help companies leverage their best on web/cloud/mobile platforms.

We enable you to create insights driven customer engagement across all touch points to build a unified marketing approach. Our custom technology solutions have been deployed successfully in companies across the globe, especially in the US, UK, Europe and Australia.



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