

Envision A New Way Of Grants Approval

Providing Salesforce Grant Management Solution for Non- Profit

OBJECTIVE

To provide the client with a customized salesforce solution that help to manage their Non - Profit with Funds Approval with Granting System, Child Information and Donation Request Tracking.

CHALLENGES

- Managing the Child Information and Hospital, Pharmacy and Other details of the Child.
- More manual work on updating the Child information and Funds Allocation.
- Managing large number of data from Multiple Hospital, Multiple Pharmacy in a single online form.

APPROACH

- Implemented Sales cloud for Non-Profit to handle the Organization Activities and Grants Management
- Implemented Custom Built Application to meet the Unique requirements of the client with a Dynamic Approval process
- Implemented Custom Lightning Components and Custom UI Pages for better Experience and to meet the Complex Process Automations.
- Salesforce Sites for Fund Request Registration and Sign up form
- Data migration to import data from other tools and Excel.

BUSINESS BENEFITS

- Registration of online Fund request made efficient and Tracking of Grants and Approval of Fund request is accomplished.
- Duplicate Management of the Contacts, Childs, Application Request were handled effectively, and Donation Tracking was captured by the System.
- Child information Management Application provided a whole new way of capturing the Child's information with Details on Health, Child Diagnostic History, Hospital Information tracking, Pharmacy Information Tracking, Payment Done.

INDUSTRY

Non-Profit Organization

CUSTOMER PROFILE

US-based Nonprofit, having 5+ years of experience of Raising funds and Granting them for Kids Struggling with Cancer

TECHNOLOGY AND TOOLS

- Sales Cloud with NPSP
- API Integration
- Custom Lightning Components
- Salesforce1 Mobile App
- Lightning Platform



About CloudQ

CloudQ provides unparalleled guidance on Strategic Planning, Implementation and Maintenance of software Business Solutions for our clients in a cost-effective way.



www.cloudq.net

info@cloudq.net

US: +14044101441

IND: +914714067178