



## A Catholic agency uses the Cloud and Salesforce Community to better manage Social Change Initiatives

### Challenge

- Volunteers use excel sheets for data collection and needed a mechanism to send data from excel to Salesforce
- Needed a mechanism to improve interaction between Diocesan Directors

### Idea

- Use an inter-mediator between excel and Salesforce to easily transfer data to Salesforce.
- Use Salesforce Community Cloud.

### Our Solution

- Using X-Author for Excel, we transformed MS Excel from a standalone tool into Cloud, facilitating full CRM adoption, and eliminating double entry and data entry errors.
- Performs operations (Update, Delete, Insert) from Excel sheets directly into Salesforce objects like Account, Opportunity, Contact, Opportunity, Product, Soft Credit.
- Developed a community platform, built on Salesforce Communities, for Diocesan directors to forge deeper relationships with donors.
- Enables the directors to view related and specific data about the area they cover for donation collection.
- Manage the overall system maintenance to ensure smooth functioning.

### Client Description



- A Catholic agency for international humanitarian relief and development in Australia
- Part of an international confederation of 165 Catholic relief, development and social service organizations.

## Business Benefits

- Simplified data administration, and made CRM reporting easier.
- Community platform brought to market in a very short time frame.

### About CloudChillies

CloudChillies' Salesforce Certified professionals have the knowledge and passion to solve problems - big and small - and deliver Salesforce projects successfully and affordably. We have years of experience in all facets of Salesforce, covering cloud advisory, Salesforce integration services and Lightning platform development.

We assess your needs to provide maximum value through IT to increase your impact and achieve your mission.



✉ Email : [info@cloudchillies.com](mailto:info@cloudchillies.com) | [www.CloudChillies.com](http://www.CloudChillies.com)

📞 USA : +1-732-733-6991 | Australia : +61-261-452-397

India : +91-731-2927999



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