



Helping an Org provide improved research, advocacy and support to Neuroblastoma patients and families

Challenge

- Used Excel sheets and few disjointed non-integrated systems to manage contacts, events and marketing.
- Systems were isolated and not integrated with each other, creating issues with reporting and arrangement of data in consolidated format.

Idea

- Proposed Salesforce with NPSP to help the company manage their donors, volunteers, events, and marketing details in one place and increase their reporting capabilities

Our Solution

- Used all standard objects such as Account (Managing business donors), Contact (Store contact / Private donors), Opportunities (Store direct and indirect donation details) and Campaign (For managing events)
- Cleaned and imported data from multiple systems into Salesforce for a 360-degree view.
- Synced with Event Brite to provide complete and consistent data for better event planning.
- Created Apex triggers to improve data flow associated with Event Brite integration, allowing for easy tracking of ticket and merchandise.
- Provided improved reporting, analytics and design options for marketing campaigns using Mail Chimp.
- Implemented various custom objects -Recurring Donation, Relationships, Address, Affiliation, Household, Volunteer Hours, Volunteer Job, Volunteer Recurrence Schedule, Volunteer Shift

Client Description

- A registered charity working with people affected by neuroblastoma.
- Run by families and friends affected by neuroblastoma on a volunteer basis.
- Focused on increasing fundraising efforts to facilitate more research into Neuroblastoma.

- Set up time-based workflow rules to create reminders and perform automated actions.
- Scheduled regular data backups for disaster recovery purposes.
- Created new reports from the integrated database to get the most up-to-date information every time.

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.

 CloudChillies



✉ Email : info@cloudchillies.com | www.CloudChillies.com

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

India : +91-731-2927999



Collaborative
Atmosphere



Competent Team



Constant Support



Inclusive Culture



Creative Thinking



Professional
Development