

Automating Membership Renewal Invoices for a Nonprofit Organization with ChargeOn

Explore how we automated a nonprofit membership organization's three-stage invoice delivery process by integrating ChargeOn with Salesforce.

Products: ChargeOn, Salesforce Service Cloud, Salesforce Marketing Cloud

Industry: Nonprofit Business Organization

Region: Ohio, US



Business Overview



The client is a nonprofit membership organization dedicated to supporting small businesses and entrepreneurs. Founded in 1998, the client operates as a membership-based organization with recurring annual or multi-year membership tiers.

The client manages a diverse membership base that includes sole proprietors, small business owners, corporate members, and community stakeholders. Their membership model relies on ongoing subscription fees. Timely invoice delivery is essential for keeping cash flow steady and making sure members know when to renew. They followed a strict three-stage invoice escalation cycle designed to maximize member renewal rates by providing multiple communication touchpoints.



Reason for Collaboration

The client was manually sending renewal invoices through email. They had to identify members in Salesforce, create invoice documents offline, and compose individual emails. There was no automation, so invoices were often sent late, duplicated, or missed entirely. The client's team was unaware of whether members received or opened invoices, causing missed renewals and lost revenue.

The client partnered with Cyntexa to integrate ChargeOn with Salesforce to automate their invoicing and delivery process. The goal was to eliminate manual work and ensure invoices are generated and sent automatically on the correct dates.

Challenges



No Scheduled, Automated Email Delivery Based on Membership Expiration Dates

The client's teams had to manually send invoices via email. They had to remember when to send each renewal reminder. This often led to delays and missed send dates. The client was unable to maintain consistency with the 3-stage emailing process, which required sending the first invoice exactly 2 months before expiration, then the second invoice if no renewal was processed, and lastly the third invoice in the absence of renewal. Some members received invoices earlier or later than intended, disrupting the intended renewal communication cadence.



Solutions

We integrated ChargeOn with the client's Salesforce environment and configured the Salesforce Billing process to automate the entire membership renewal invoice delivery process.



1

ChargeOn Schedules Automated Email Delivery Based on Renewal Status

We configured ChargeOn to monitor membership expiration dates and automatically schedule when pre-generated invoices are sent to members, with intelligent conditional logic that prevents duplicate sends:

- Stage 1 (2 months before expiration): ChargeOn triggers Salesforce Marketing Cloud to send the first invoice email automatically on this exact date.
- Stage 2 (1 month before expiration): ChargeOn monitors the member's renewal status. If no renewal has occurred within 30 days of Stage 1, ChargeOn automatically triggers the second reminder email. If the member has renewed, Stage 2 is canceled.
- Stage 3 (at or just before expiration): ChargeOn checks renewal status again. If the member still hasn't renewed after Stage 2, ChargeOn triggers the final urgent reminder email. If renewed at any point, Stage 3 is canceled.

This three-stage automation with built-in conditional logic ensures consistent, on-time delivery while eliminating duplicate sends. The members receive only the invoices needed based on their current renewal status.

Benefits

Here are the transformative benefits that our client achieved



100%

Consistency in Renewal
Notification Timing



85%

Reduction in Manual
Operations Staff Time



28%

Improvement in First-
Invoice Response Rates

ChargeOn automated the nonprofit's membership renewal process and reduced significant manual work.

Experience the same transformation for your organization.

Connect With Experts Today!

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With expertise in CRM implementation, integration, and business process automation, we stand out as a prominent industry leader, delivering solutions that generate substantial value to meet your diverse business requirements.

