Glorieta Adventure Camps: A Case Study

Venn's solution saves Glorieta Camps one full-time contractor, endless reconciliation errors, and delivers significantly more useful data to its board of directors.

Glorietta was already able to take camp registrations and payments through its website and push this data into its Salesforce.com CRM. But that wasn't the issue. Getting that data into Sage Intacct and matching those payments with its Authorize.net payment processing system was so fraught with problems that—even with a 7-person accounting team—they had to add an outside contractor to address the issues manually.

This was not exactly the fulfillment of their dream of automation.

Then, in late 2017, Glorieta met Venn Technology at the Sage Intacct Advantage conference and decided to have Venn provide a creative solution—robust, fully-automated, three-way communication between Salesforce, Authorize.net, and Sage Intacct using Workato as middleware.

"We went from an error-prone system requiring manual operations to move data to the right places—to zero problems and the elimination of an outside contractor's salary. Until audit, we didn't even know that we had system failures and errors. Now we have real-time visibility to the entire process."

— *JEFF WARD, DIRECTOR OF FINANCE AND OPERATIONS*

Venn's Workato-based solution streamlines multiple transactions between Salesforce Invoice and Authorize.net payments, avoiding system overload and performance issues. In addition to managing financial transactions across the three applications, Venn Technology built an additional integration stream to deliver more granular data that Glorieta's Board of Directors can use to see a more accurate picture of the non-profit's finances as well as

more meaningful insight into how it's fulfilling its mission.

Glorieta Camps seek to inspire Christ-like change through outdoor adventure, authentic relationships, and Biblical truth. With locations in New Mexico, Texas, and Washington, their goal is to be able to give away 20% of their camp-nights to young people—Christians and non-Christians alike—without the financial means to attend.

Venn is particularly proud that, because of the additional integration suggested to keep track of statistical accounts in Intacct, Glorieta now has its fingers on the pulse of their finances and their impact on individual lives.

"The investment we made in the integration project with Venn pales in comparison to what they're saving us. And, they did such a great job with the integration and with coaching our IT folks—they've worked themselves out of a job."

Solution

Authorize.net + Salesforce.com + Sage Intacct — integrated by Venn via Workato.

How it works

Marrying up the Salesforce Invoices and Authorize.net payments by having the Glorieta team push the Invoice ID over to Authorize when payment is processed, Workato is able to save thousands of API calls per day. In addition to managing financial transactions across the three applications, Venn custom built another integration stream that provides registrations, capacity, and camp night utilization data into the Glorieta's statistical journal in Sage Intacct.

Result

Need for outside contract help, gone. Visibility into daily transactions, total. Automation, transparent. Problems, Zero.

Kudos

"It's hard to express how nice it is to finally do an audit and have zero errors. Venn was an absolute pleasure to work with. They kept every commitment." — Jeff Ward