



# Envisioning a New Way of Grant Approval

Providing Salesforce Grant Management Solution for Non-Profit

## OBJECTIVE

To provide the client with a customized Salesforce solution that helps manage their non-profit information: funds approval with granting system, child information, and donation request tracking.

## CHALLENGES

- Managing each child's information about their hospital, pharmacy, etc.
- Reduce manual work when updating child information and funds allocation.
- Managing a large amount of data from multiple hospitals and pharmacies in a single online form.

## APPROACH

- Implemented Sales cloud for non-profit to handle the organization's activities and manage their grants.
- 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 a better user experience with complex process automations.
- Created Salesforce sites for fund request registration as well as a signup form.
- Data migration functionality for imports from other tools and Excel

## BUSINESS BENEFITS

- Registration of online fund requests were made more efficient and tracking of grants and approvals of fund requests were made possible.
- Management of duplicate contacts, children, and application requests were handled effectively, and donation tracking for each is now captured by the system.
- A child information management system application provided a whole new way of capturing details on health, child diagnostic history, hospital information, pharmacy information, and payments for each child

## INDUSTRY

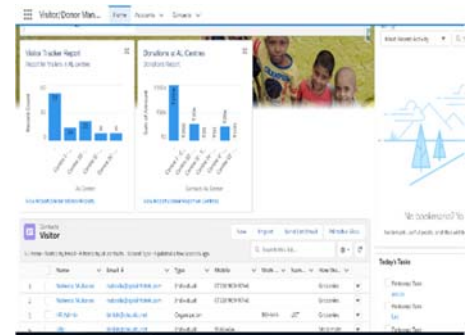
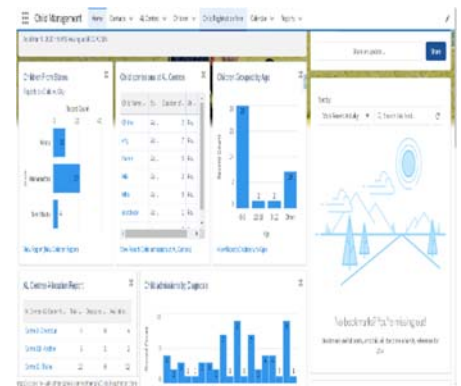
Non-Profit Organization

## CUSTOMER PROFILE

US-based non-profit with 5+ years of experience with raising funds and granting them to kids struggling with cancer.

## TECHNOLOGY AND TOOLS

- Sales Cloud with NPSP
- API integration
- Custom Lightning components
- Salesforce1 mobile app
- Lightning platform



## ABOUT CLOUDQ

CloudQ helps companies succeed by consulting, implementing solutions, and providing certified professionals. We're one of the INC 5000 fastest-growing private companies, and we're based in Alpharetta, GA. We specialize in cloud-based technology implementation and are a Silver Consulting partner with Salesforce and have a transparent, highly-efficient, customer-centric business model.

## CONTACT

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