



Case Study

Educational Nonprofit: Mainstay Integration



The Client:

A Nonprofit Education Organization

For the client, students are at its core. They are helping first-generation students from low-income backgrounds get into, get through, and get past university and successfully launch their careers.

The Start of the Client and Application House's Collaboration

The client first enlisted the help of Application House to overcome the overdue technical debt they have accumulated by the end of 2021. The client was impressed with our approach and delivery, so they continue to work with us on several other projects.



The Project: Mainstay Integration into Salesforce



Origin of the Project

The client launched a new program to serve students who are not attending one of the colleges on their list. Initially, the students selected for the new program are the ones who didn't qualify for the current program, but now the client created an application process for the new program itself.

Now, Our client wanted to connect to students through their mobiles, so they have decided to leverage a messaging app.

- As a first step, they consulted with Our Application House's Architect, on which tool to use. He suggested one already in Salesforce, but the app did not meet the Client's requirements.



- They then opted for Mainstay, an engagement platform that increases student and staff interaction.
- It allows them to communicate with students about their concerns and it has a chatbot that automatically replies to students but also allows them to request to talk to the actual advisors.

The Challenge for Application House

- The client uses Mainstay as a sort of extension of Salesforce so they wanted to bring the interactions in Mainstay into Salesforce.
- At the same time, they wanted to remove the manual export and upload of data from Salesforce to Mainstay.
- The records of students who apply for the new program are created in Salesforce so any changes made would also be manually uploaded to Mainstay.



The Application House Process

The client wants to integrate Mainstay into their Salesforce, and the initial requirement was to write Rest API. Rather than proceed with what was first required, Application House looked at other possibilities, one more efficient

That is to find a ready-to-install integration solution for Mainstay in AppExchange. After coordinating with Mainstay, Application House found that there's an available integration solution, Mainstay Sync for Salesforce.

This offered the following:

- One-time import & export commands to generate new records in Salesforce for the contacts in Mainstay, and vice-versa;
- One-or two-direction sync, meaning updating data in one or both systems when there are changes;
- View Mainstay conversations & campaign history within the Salesforce Contact record page.



With one click, the integration should have been completed. However, a conflict arose in integrating with the Contact & Custom Object. For data to flow from Mainstay into the Custom Object, there is a need to create twenty fields, but the limit of the field has been reached.

An extensive discussion emerged to find the most appropriate solution.

- The initial solution presented was to use a Junction Object to connect the Contact and the Custom Object, then copy the data from the Junction Object to Contact & Custom Object. The Junction Object then syncs with Mainstay, and the data from Mainstay flows to the Junction Object.
- Using a Junction Object requires a lot of resources, such as flow development to copy data to Contact and Custom Object, which will take a lot of unnecessary system resources.
- Application House's Architect explained and insisted on the right way. That is to integrate the Custom Object with Mainstay rather than the Junction Object. But to do so, they need to delete some unused fields.



Once convinced, the client agreed with the solution presented by Application House's Architect. The team and the client worked together and deleted about twenty fields. This allowed the integration of the Custom Object with Mainstay.

The Results

The integration project bridged the gap between manual and automatic activities, allowing the client's advisors to focus more on the students. Specifically, the project

- Brought and displayed conversations from Mainstay into the Salesforce Program Record Page. Application House added a hyperlink in the student record view that allows advisors to open the conversation exchanges with the student in Mainstay in a new tab, where they can already send a reply



- Allowed to automatically create a contact in Mainstay for students whose records were added in Salesforce after being accepted into the new program;
- Created a process for the intake & recruitment of applicants for the new program; and,
- Built a new UI for the new program that allows advisors to get a single view of all relevant details needed to interact with the students



Why Choose Application House Limited?

Application House gets to the core of an issue. By doing so, we can provide the most appropriate solutions that give you the results that underpin your success. Yet you, as nonprofits, continue to do good and serve people. Our part in helping make the world better is by offering our pro bono program, which will give you the first month of our service free of charge.



Architecture &
UX Design





CONTACT US

Client company names can be shared on request

If you're ever interested, send us an email at **sales@applicationhouse.com**

We're ready to discuss how we can start this for you!

