

Case Study

A Veteran Nonprofit Migrates to Salesforce Community Cloud



The Customer

The customer is a nonprofit organization providing loans for US veterans. The organization was using Salesforce as a CRM and a website where loan applicants could upload their documents. The signed documents were saved in a separate location and then passed to a loan expert who made decisions on providing a loan.

To simplify the daily routine, the customer needed a single system where administrators could manage all the steps of providing a loan and where all the documents could be stored.



Brimit built a Salesforce-based community with a document storage

We decided to create a new system based on Salesforce since the organization had already been using the platform. In particular, we decided to deploy a community on Community Cloud, which has a secure environment for data sharing, collaboration, and provides external users with access to Salesforce data. Thus, it would be more convenient for loan experts to use the community.

To create such a system, our team completed several steps:

- configured the community;
- configured Visualforce to display, access, and update data in the community;
- configured Apex to provide control over the flows and transactions, as well as Triggers for initiating the flows;
- created file storage within Salesforce;
- integrated custom-built .NET app with Community Cloud using Salesforce's REST API.

The results

Upon completion of the project, the organization got a system to store documents and organize paperwork. The software solution, based on Salesforce Community Cloud, provided loan experts with improved UI, saved dozens of hours and allowed for processing more applicants over a week.



Brimit is a team of Salesforce experts.

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