

CaseStudy -Salesforce Nonprofit Cloud Implementation for Good Food Works

Project Overview

Questions / Inputs Required : What was the existing system? Why change was required?

Good Food Works is a non-profit startup organization focused on creating sustainable food initiatives for the common good.

To support their fundraising and donor engagement goals, they needed a reliable and centralized CRM platform to manage donor relationships, donation transactions, refunds, and related activities in one place. The organization also required an automated solution to capture donation transactions directly from their website and store them in Salesforce in a structured, report-ready format.

This enabled accurate reporting, streamlined communication, and long-term donor engagement while eliminating manual data entry and reducing operational effort.

Business Challenges

Questions / Inputs Required : Top 3 business & technical challenges

No centralized donor management platform

Donor information and donation history were not stored in a single system, making it difficult to track engagement and build donor relationships.

Manual donation tracking and reconciliation risk

Donation data needed to flow from the website to Salesforce automatically to reduce operational overhead and avoid errors.

Need for clean reporting for fundraising insights

The organization required structured donation data to support reporting on campaign performance, donor trends, and fundraising totals.

Refund and soft credit tracking complexity

Needed a reliable way to handle refunds, reversals, and on-behalf giving (soft credits). Manual handling would lead to incorrect totals and reporting issues

Architecture(Before)

Questions / Inputs Required : Old Tech Stack, Hosting, Architecture Type

Since this was a newly launched initiative, there was **no existing CRM or fundraising platform** to manage donor data or donation transactions. A complete Salesforce-based solution was required to establish the foundational architecture for donor management, donation tracking, and future scalability.

Architecture(After)

Questions / Inputs Required : New Tech Stack, Cloud integrations

- **Salesforce Nonprofit Cloud New Org Setup**
- **Fundraise Up Integration** for donation capture and donor mapping
- Salesforce reporting and dashboards to support fundraising visibility
- Configured automation for streamlined donation processing and donor data updates

Modern Architecture Overview:

A modern CRM ecosystem built on Salesforce Nonprofit Cloud, integrated with Fundraise Up to automatically sync donations and donor information into Salesforce for accurate fundraising operations and reporting.

Key Features

Questions / Inputs Required : Top 5 value-driven features delivered

Fresh Nonprofit Cloud org setup

Established the CRM foundation with the correct nonprofit data model, core configuration, and scalable structure.

Fundraise Up + Salesforce integration

Enabled automated creation and update of donation-related records inside Salesforce from website donations.

Centralized donor profile management

Consolidated donor information, donation history, and engagement details into a single system.

Donation tracking & transparency

Improved visibility into donation transactions, donation attribution, and donor contribution history.

Reporting-ready donation structure

Built donation data properly so the organization can create reports and dashboards for decision-making.

Data & Security

Questions / Inputs Required : Data migration, access control, compliance

Implemented structured donor and donation record handling in Salesforce

Ensured secure data access based on user profiles and permission sets

Designed the solution to maintain data integrity, ensuring donation records are consistently mapped and reportable

Enabled secure integration flow between Fundraise Up and Salesforce without exposing sensitive payment details in Salesforce

Performance Metrics

Questions / Inputs Required : Speed, cost, scalability, efficiency improvements

60–80% reduction in manual donation tracking effort

Reduced manual donation entry effort significantly through automation

Improved operational efficiency by enabling direct donation sync from Fundraise Up to Salesforce

Enhanced reporting readiness with consistent donor and transaction data

Faster access to donor and fundraising reports

Improved data accuracy through automated integration

Delivery Model

Questions / Inputs Required : Team size, roles, duration, methodology

Team size: 2

Roles: Project Manager - Requirements gathering, Coordination

Salesforce Developer- Custom development, integrations, and automation

Duration: 3 Month

Methodology: Iterative delivery with configuration and testing cycles

Engagement Summary:

Delivered the nonprofit CRM setup and Fundraise Up integration in a structured and phased approach, ensuring configuration accuracy, integration reliability, and readiness for future enhancements.

Technical Differentiators

Questions / Inputs Required : What we did better or differently

Built a scalable nonprofit CRM foundation from day one

Ensured the org structure supports future growth, additional apps, and new fundraising processes.

Integration-first approach for donation automation

Focused on removing manual effort by ensuring donation data lands in Salesforce in a clean and structured format.

Data quality and reporting readiness

Designed donor and donation records so that reporting becomes simple, reliable, and consistent.

Secure and compliant handling

Ensured that sensitive payment details stay within the payment platform while Salesforce stores the CRM-level transaction tracking data.

