



Caritas unifies its Processes and Saves Hours of Manual Data Management



Client Business Description

- Australian Charity arm of Rome's Catholic Church for international humanitarian relief and development activities. Caritas operates several projects touching human lives in South East Asia, Papua New Guinea, East Timor, Solomon Islands etc.

- Caritas is part of an international confederation of 165 Catholic relief, development and social service organizations.
- Leverages donation money for International humanitarian and charitable causes. Caritas Australia's International Programs (IP) Team is responsible for handling these projects.

Challenge

- Systems at the Charity needed a technological overhaul to manage international programs easily.
- Data being stored in Spreadsheets & Docs (stored locally or on emails). Existing system incapable of handling the amount of data. Data not even searchable nor reportable.
- Need for better efficiency and reporting over a wide variety of projects in various regions. Frequent travel to remote areas in Africa, Polynesian Islands etc. necessitates storage of data in the cloud

Idea

- Customize Salesforce to implement and manage all required use cases
- Create a mobile application for easy access and management of data

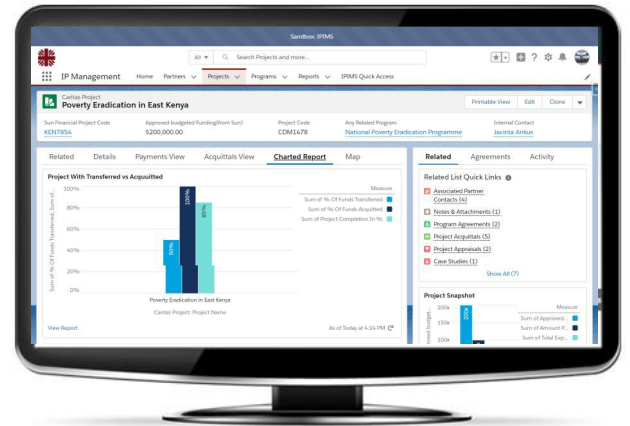
Our Solution

- Salesforce is an existing system being utilized already, hence it led to a much shorter learning curve for the IP team.
- Implemented a dedicated standalone Lightning application on the Salesforce platform to enable the IP team to manage structured data on the cloud

- Created custom object to store documents related to each project, such that they can be retrieved on a later date.
- Created a system to manage financial documents and compliance reporting. Financials/acquittals and proper ledgers were maintained for inwards and outwards.
- Ensured system takes care of partner agreements, trainings, employee profiling and assessments, and partners' due diligence and appraisal.

Business Benefits

- Enabled IP team to access relevant data on the cloud, and be up and running quickly.
- Easy and standardized access to enhanced reports and assessment of funding, financials, design & project progress.
- Easy management and overview of social projects running for multiple years at a stretch.
- Improved donation and project expenditure forecast; visible on the same org.
- Easy management of all government obligations within the system.



About CloudChillies

CloudChillies' Salesforce Certified professionals have the knowledge and passion to solve problems - big and small - and deliver Salesforce projects successfully and affordably. We have years of experience in all facets of Salesforce, covering cloud advisory, Salesforce integration services and Lightning platform development. We assess your needs to provide maximum value through IT to increase your impact and achieve your mission.



Email : info@cloudchillies.com | www.CloudChillies.com
 USA : +1-732-733-6991 | Australia : +61-261-452-397
 India : +91-731-2927999

