

CASE STUDY: NONPROFIT IMPROVES EFFICIENCY WITH SALESFORCE INTEGRATION & CUSTOMIZATION



UNITED NEIGHBORHOOD CENTERS OF NORTHEASTERN PENNSYLVANIA—The United Neighborhood Centers of Northeastern Pennsylvania (UNC) is a non-profit agency dedicated to meeting the needs of local low-income families, seniors, and youth, while also empowering them to attain self-sufficiency.

To achieve this goal, UNC oversees six programmatic departments (Community Services, Child Care, Youth, Older Adults, Community Education & Revitalization, and Community Health) and a Housing/Community Development Corporation. Through this diverse programming, UNC uses an innovative wrap-around approach to address the emerging needs of the community it serves. With its beginnings dating back to 1923, UNC has become one of the largest, and longest operating, nonprofit organizations in the region.

THE BUSINESS CHALLENGE

To manage fundraising for its numerous programs, the United Neighborhood Centers of Northeastern Pennsylvania was using a well-known fundraising management software system for nonprofits that it found to be too complicated.

“That system had so many bells and whistles, it was frustrating,” explained Jill Eidenberg, director of development at UNC. “Getting a report together was such a challenge, and I never trusted it to be accurate. Since we were paying a huge amount of money each month for a system that was not easy or reliable, we started to question whether we should continue to use it.”

UNC also found that because the fundraising management system wasn't compatible with its accounting system, donor gifts had to be entered twice — once in the fundraising management system and again in the accounting system — a time-consuming situation ripe for inconsistencies.



THE ACCUFUND SOLUTION—INTEGRATING WITH SALESFORCE

When UNC requested a recommendation from AccuFund, their trusted accounting system vendor since 2011, Salesforce, a cloud-based fundraising and constituent relationship management (CRM) solution, was suggested.

AccuFund Accounting Suite easily integrates with Salesforce via its AccuFund Connector. With the AccuFund Connector, UNC is able to unite all the functions of its accounting system with Salesforce. AccuFund CRM optimized and customized the core components of Salesforce into a reliable donor database to improve the organization's development, management and fundraising activities.

This now provides the organization with a complete nonprofit management solution and UNC eliminates the need for double entry on every donor transaction.



A WORLD OF PRAISE FOR ACCUFUND

AccuFund CRM optimizes and customizes a Salesforce donor database to improve an organization's development, management and fundraising activities.

"AccuFund CRM customized Salesforce to meet our needs. Now, whenever I enter donations into Salesforce, it appears in the AccuFund Accounting Suite so the financial department can see activity immediately," explains Eidenberg. "We're no longer taking the extra step of re-entering gifts for accounting."

UNC finds that the most significant benefit of Salesforce is its ease of developing reports. Each year, UNC has several signature fundraising events and appeal campaigns requiring specific reports for production and pledged dollars. For each campaign and event, Eidenberg needs to assemble a report for the UNC board of directors and leadership, highlighting fund allocation and revenue.

"With our previous fundraising management system, there were multiple tiers of reporting for every gift," explained Eidenberg. It was a frustrating process. I would call the vendor for help and then get placed in a queue. Then, every time I spoke to someone, I would get a different answer, so I would continue to question the accuracy of my reports."

"With Salesforce, it's very simple," continued Eidenberg. "I can quickly and easily get an accurate report on a particular campaign or event, with the accounting on it very complete and organized."

AccuFund CRM has customized Salesforce in a way to allow Eidenberg to save time while generating reports. "With multiple campaigns and events, I'm saving at least an hour or more per report, not to mention time being frustrated," she said. "It has certainly enhanced productivity."

"My compliments to Sarah Finley on the AccuFund CRM team, continued Eidenberg. "She set the agency's system up so beautifully and walked me through the whole process. It was seamless, and she continues to be an incredible support person. She's the best!"

In closing, Eidenberg stated, "We're thankful to have integrated this system into our daily operations. AccuFund CRM helped customize Salesforce into a logical, efficient system providing superior data entry, navigation and reporting to help UNC improve its overall management."



LEARN MORE ABOUT ACCUFUND

Visit our Website at www.accufund.com, call your local reseller, or contact our Sales Department at 877-872-2228. We would be pleased to discuss this case study, explain the benefits of AccuFund for your fiscal department, and put you in touch with a local reseller certified to install and support the AccuFund Accounting Suite.

AccuFund CRM optimizes and customizes Salesforce into a donor database that meets the unique needs of an organization; improving development, management and fundraising activities. For information about customizing your Salesforce solution, contact Sarah Finley at sarahf@accufund.com.