



## Case Study

# New York, USA - Automating Fundraising Campaigns with Power Automate, Salesforce & ServiceNow

### Client Overview

The client is an NGO dedicated to advancing medical research in various domains, such as cancer. To support their research initiatives, they raise funds through multiple campaigns. Donors contribute funds via different websites that are categorized based on donation types. These contributions play a crucial role in enabling the client to conduct extensive research in medical sciences. Codinix has assisted in automating this process to enhance efficiency and accuracy.

### Client Objective

The primary objective of the client is to streamline and automate the fundraising process to reduce manual effort, minimize errors, and improve overall efficiency. By leveraging automation, the client aims to simplify data management, enhance performance, and ensure seamless [integration between Salesforce and ServiceNow](#). Codinix has played a pivotal role in achieving these objectives through its expertise in automation.

### Introduction:-

Codinix helped an NGO streamline its fundraising process by automating data management and system integration. Previously, manual handling of donation records led to inefficiencies. By [implementing Microsoft Power Automate](#), we reduced errors, improved performance, and ensured seamless integration between Salesforce and ServiceNow, allowing the NGO to focus on advancing medical research.

### Goals of the Migration

- **Efficiency and Accuracy:** The automation of this process increases efficiency and accuracy. Currently, multiple Excel sheets are used, making the process complex. Codinix has helped in converting this manual process into an automated workflow using MS Power Automate, thereby eliminating manual errors.
- **Improves overall performance and reliability:** The performance will be improved through automated process because it simplifies the process and makes it easier.
- **Time of order processing:** This is another aspect, as an automated process the bot can work for 24x7, so more work can be done with high accuracy, and it saves resources.

### Current State Analysis

Currently the fund raising through campaign uses Salesforce and ServiceNow where the donor donates the fund through websites and the database is maintained in the Salesforce. The database in Salesforce is

maintained by the manual process.

The next step is to upload the data in ServiceNow. The client launches campaign to raise funds. Each campaign is having unique campaign id. These campaign IDs are required to segregate the fund Batch wise. After generating Batch number for each donation, these Batch wise data is uploaded in the ServiceNow. Codinix has automated this process, making it more efficient and seamless.

### Our Migration Strategy:-

Codinix initiated the migration process by listing all existing systems, analysing their usage, and assessing their business importance. The key focus was to reduce the manual effort involved in handling complex Excel sheets.

We have documented everything by taking into consideration the accuracy and timely implementation of automation system. We set clear goals for the automation system to reduce the complexity and improving the performance.

The technology used to build the entire automation are:-

- Microsoft Power Automate
- Salesforce
- ServiceNow
- Microsoft Outlook
- Microsoft Excel

### Challenges

Some of the challenges that encountered while implementing the automation was as mentioned below

- **Multiple Websites:** The bot needed to log in to both Salesforce and ServiceNow, requiring careful handling of multiple login processes to ensure seamless automation.
- **Multiple Excel Sheet:** In this process, multiple Excel sheets are used. One Excel sheet comes as an email attachment, the second is the coding template sheet, and the third contains the Campaign ID and Society Key. Therefore, an automated process must carefully handle multiple Excel files.

### Solution Implemented:-

Codinix developed a solution by using Power Automate:-

- Power Automate was used to download the excel sheet attached and save in the shared drive from email.
- Bot has login to the Salesforce and search the donation using the Payment Id. After identifying the donation, enter the donor information in the Salesforce.
- The client maintains an excel sheet which is known as Coding Template Sheet. Open the coding template sheet and enter the details in the sheet like society key, category Id, revenue category, last name, first name, email address, amount, organization etc.
- The coding template sheet was then saved with a unique batch number.
- Finally, the batch-wise data was uploaded into ServiceNow, ensuring smooth integration and accuracy.

### Conclusion

Codinix has significantly improved the client's fundraising process by automating data handling and system integration. The bot now operates in an unattended mode, processing emails with unique subject lines without human intervention. This has allowed the client to eliminate the complexity of managing multiple Excel sheets, thereby increasing operational efficiency and accuracy. The client is highly satisfied with the automation approach, which has optimized their workflow and reduced manual effort.