Case Study: Non-Profit Organization

Industry:

Non-Profit Organization

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Project Summary

Client is a not-for-profit organization. Its role is to protect, preserve and facilitate dissemination of spiritual teachings. Foundation maintains Ashrams and meditation centers around the world and is headquartered in USA. Different technologies are used as means of informing seekers about spiritual practices, calendar of teachings and learning events and opportunities to serve as staff of the foundation.

To build on its continued success, when organization felt its lead generation and maintenance efforts had plateaued, the organization decided to invest in a new, more sophisticated CRM system.

The result was a digital transformation solution that efficiently and effectively integrated– using a flexible CRM to maintain, handle and enhance existing system of Organization. Ray Business Technologies provided different solutions to replace various legacy applications (intranet based) with MS Dynamics 365 Customer Engagement and other customized modules.

Executive Summary

Ray Business Technologies developed and deployed MS Dynamics 365 Customer Engagement for HR operations. Developed application reduced manual effort and paperwork in streamlining different organizational processes.

Case Study on Microsoft Power Apps and Flow

Challenges

- **To many emails -** When a Seva profile information requires an update, an email request should be sent for an update. After this email is sent, the requests to update are sent back to that person — usually as a barrage of emails. It takes time to sift through all of them, and the volume becomes unmanageable for various seva profiles as the update details expand.

- **Manual steps -** To get the relevant data out of email, teams usually manually copy and paste data into another system, like Excel.

- **One person to manage it all** - One person is responsible for managing the Seva profile workflow as part of their job. This is typical - the staff at

small-to-medium organizations are usually stretched thin, and little redundancy exists on teams. This is an issue when people take vacation or even depart the organization as the workflow either stalls or the work is added to someone else's already overloaded task list. The process is fragile if people don't have backups, and for complex workflows that require manual steps to remember, it's difficult to build in redundancy.

Solution

Users access the app from their computer or mobile device. This directs them to the Power App, which is the interface to the application itself. Here's how it all works:

Power Apps - Power Apps is the interface for the user. Users can view available Seva profile records, see profile they signed up for. We've designed this app to work on smartphones and computers.

SharePoint Lists - SharePoint lists are used to store Seva profile data and registration info. These lists are:

- a Seva profile list to save the historical list of all Seva offered

- a registration list to store users resume and photos they have registered with

Power Automate Flows - Flows for lists work in a couple of ways: flows are triggered when a change happens, or an automated flow can run at regular intervals. We used both types of flows for this app.

One Flow is used between the Seva profile list and registration list when admins are making the list of Seva profile. This flow automatically copies the registration list data from the Seva profile list to reduce the need for manual copy and paste and chance of error.

Another flow sends a reminder a few days for partial Seva profile updates to all the registrants. This is an automated, daily flow that runs on the Registration List which again, saves time and the chance of errors.

There are a few other parts that round out the app:

Emails – An Email for Seva profile updates and confirmation emails when an employee is registered, update and submit.

Admin Views – Admins manage data through standard SharePoint views and list functionality. If they see a Seva profile is a full and they need to adjust for a high-priority request, they can bump someone off if needed. Emails are triggered when changes like this happen.
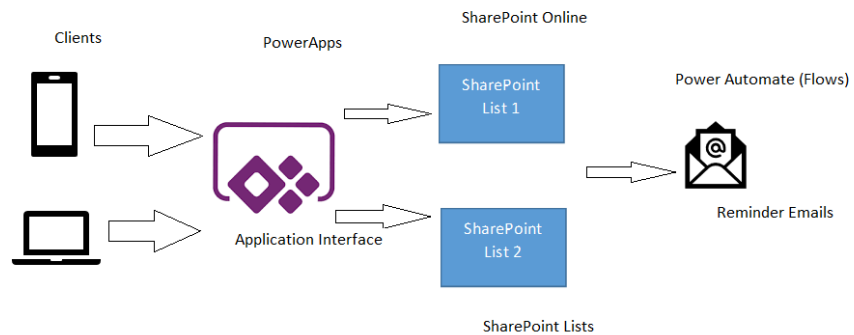
Admin Control – Admins have overall control of the system by being able to manipulate the data at the list level, and Power Apps display the current representation for the user and Seva profiles they are registered for.

Benefits/Business Case

Using Power Apps and Power Automate an email workflow that the HR team users to manage screening and updates.

- **Cost and time benefit** - With Power Apps and Automate, it's faster and easier to hook up applications to various data sources and get going with simple forms compared to building an app from scratch. For simple applications, you can build an automated workflow in less than a day. Complex apps may take a few weeks.
- **Familiar tools and environment** - Working with familiar tools means a greater chance of adoption/success. A Power App is essentially the interface to the data, which in this case is the course catalog and list of registrations. This data lives in SharePoint lists, which employees at the city are already familiar with and requires little training or ramp-up time. It's a relatively straight-forward architecture as you can see below:
- Increased service capacity in customized support.
- Improved client service levels by automating the key processes for transactional ease.
- Application Support from Industry (Microsoft)
- Better system uptime and process improvements are yielding benefits for the organization.

Clients

PowerApps

SharePoint Online

SharePoint List 1

Power Automate (Flows)

Application Interface

SharePoint List 2

Reminder Emails

SharePoint Lists

Conclusion

Over the course of time with Ray Business Technologies, our client has achieved great results.

1. Moved business platform from Intranet Application to Web using Microsoft Dynamics 365 technologies like PowerApps, SharePoint integration, Power App Portals etc.
2. Improved data security and compliance with industry standards.
3. Reduced process handling times by automating key processes/repeatable tasks, allowing faster turnaround time on customer requests.
4. Expanded business to several new areas/regions.

We improved our client's system towards adaptive platform (i.e. Microsoft Dynamics 365). Today, our client's software is automated, compliant, secure, adaptable, and integrated.

About Ray Business Technologies Pvt Ltd

Ray Business Technologies Private Limited is a Global Information Technology (IT) Services and Solutions company. We are a CMMI Level 3 company, providing cutting-edge IT Solutions to Enterprises worldwide, enabling them to utilize available resources effectively and manage the operations. Our excellent team of Technology Professionals work with enterprise clients in North America, Latin America, Australia, Europe, Middle East and Asia.

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