

# Client Case Study

Client: **Islamicaid**

Location: **United Kingdom**

Type: **Registered Muslim Charity**

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## Client Overview

Islamic Aid is a charitable organization dedicated to providing humanitarian support, community development, and relief aid globally. With thousands of donors worldwide, they needed a centralized and scalable platform to manage donations, donor engagement, and reporting efficiently.

## Challenges

Before adopting Salesforce, Islamic Aid faced several operational and technical limitations:

- Difficulty in reconciling donations received from multiple payment gateways and bank accounts.
- The need to run and track multiple campaigns year-round.
- Lack of tools to execute and track multiple marketing campaigns for fundraising efforts.
- Duplicate contacts and unverified data .
- Needed simple admin tools to refund, manage expiring cards etc.
- No automated engagement workflows for acknowledging donations or sending reminders.
- Mechanism to handle thousands of physical letters to donors and prospects.
- Gift Aid reclaim from HMRC.

## Solution Delivered

Our team implemented a Salesforce Nonprofit Success Pack (NPSP) tailored to Islamic Aid's needs, integrating donation flows, donor management, and reporting in one system over the period of many years. Key enhancements included:

- **Donation Management** – Online donation forms integrated with Salesforce to capture one-time and recurring donations, directly on the Salesforce.com platform.
- **Automated Acknowledgements** – Instant receipts and thank-you emails sent upon successful donations.
- **Donation Reconciliation** – Reconciliation process across multiple payment gateways and bank accounts to ensure financial accuracy.
- **Campaign & Appeals Management**
- **Tax Receipt Generation** – Automated, compliant tax receipts emailed to donors.
- **Reporting & Dashboards** – Real-time dashboards to track donations, campaigns, and donor engagement.
- **Integration with Payment Gateways** – Secure handling of card payments and recurring donation management.
- **Donor Tracking & Insights** – End-to-end donor activity tracking integrated into Salesforce dashboards.
- **Third-Party Integrations** – Mohid and Clover uploaders to manage external donation imports.
- **Google Reviews Workflow** – Automated email requests sent 56 days after donor creation to collect reviews.
- **Gift Aid Reclaim Automation** through integration with HMRC API.
- **Deduplication** – Developed a custom tool for removal of duplicate contacts
- **Data Verification** – Integration of APIs for email, mobile, and address verification.
- **Refunds & Declined Donations Handling** – Custom refund process and follow-up workflows for declined transactions.
- **Donor Engagement Workflows** – Automated acknowledgment, reminders, and reactivation campaigns.
- **Personalized Donor Journeys** via custom URLs and QR codes for seamless donation experience.
- **Tax Reclaim Process**
- **Royal Mail Integration** – Automated mailing process directly within Salesforce.
- **WorkZone Single Page Applications (SPAs)** (To handle donation-taking call center operations)
  - Voip integration (Retrieve donor information while incoming call is already registered donor)

## Results & Impact

The Salesforce implementation for Islamic Aid delivered measurable improvements across donation management, donor engagement, and operational efficiency:

- **Donor Engagement Increased** – Personalized donor journeys, instant acknowledgements, and automated follow-ups boosted donor satisfaction and contributed to higher repeat giving rates.
- **Financial Accuracy Improved** – Reconciliation across multiple payment gateways reduced errors and mismatches by 99%
- **Faster Campaign Execution** – Emergency and seasonal campaigns (Ramadan, Qurbani, disaster relief) can now be launched within hours instead of days, enabling rapid response to urgent needs.

- **Clean & Verified Data** – Deduplication and integration of email, phone, and address verification APIs improved donor communication accuracy by 80%, reducing wasted outreach.
- **Operational Efficiency** – Automated tax receipts, Gift Aid reclaim via HMRC API, and refunds/declined donation follow-ups saved staff dozens of hours per month, freeing up resources for donor engagement and program delivery.
- **Enhanced Transparency** – Real-time dashboards and donor tracking improved reporting for internal teams and external stakeholders, strengthening trust and accountability.
- **Seamless Integrations** – Payment gateway, Mohid, and Clover integrations created a single source of truth for donor and donation data, eliminating fragmented workflows.
- **Stronger Donor Relationships** – With Royal Mail integration, Google Review automation, and VoIP-enabled donor recognition, Islamic Aid can now provide personalized, timely, and trust-building communications at scale.

## Client Quote



"The Salesforce solution has streamlined our donor management, automated Gift Aid, and improved campaign efficiency. It allows us to focus more on our mission while knowing our operations are in safe hands."

**Mahmood Hassan**

Islamic Aid, United Kingdom

## Contact Us



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