



Automated Payment Data Processing for a Non-Profit with Power Automate

Industry: Non-profit organization

Location: Ukraine

Employees: 30+



Client Background

Website:

<https://en.ecoaction.org.ua/>

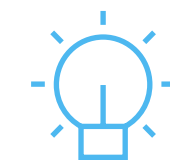
Center of Environmental Initiatives 'Ecoaction' based in Kyiv, Ukraine is a non-profit public organization that launches initiatives for environmental protection, energy efficiency, clean air, sustainable transport, and agriculture development. It unites experts and activists to develop ecological safety, progressive climate policy, and an energy-efficient economy.

Executive Summary



Goals

Automate payment data synchronization and processing



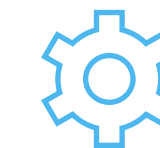
Solution

Integration of Dynamics 365 with the client's website using Microsoft Power Automate



Benefits

Enhancement of the supporters database with the information on donation payments



Services delivered

Microsoft Services and Consulting, Dynamics 365, Power Automate, Intelligent Automation

Business Challenge

As a non-profit organization, Ecoaction deals with numerous partners, volunteers, and activists to raise funds for its initiatives through donations and subscriptions.

Managing all incoming payments and requests for membership and joining Ecoaction's initiatives was performed manually across a few services covering various elements of work (contacts database, banks online services, mass mailing platform), which consumed

much time and effort and imposed risks of errors and data inaccuracies. Thus, our client needed to centralize data collection and automate this process to optimize operational time & costs.

In addition, our client required technical assistance to improve the existing implementation of [Microsoft Cloud for Nonprofit, Fundraising, and Engagement](#).

Solution & Business Value

Infopulse helped Ecoaction improve their previously implemented Microsoft Cloud and Dynamics 365 setups. Using Power Automate and API to connect the client's website, we also implemented automated payment data import as requested by the client.

As a result of this project, Ecoaction gained:

- **Error-free payment data import** that allows easy tracking of all the received and scheduled payments.
- **Full transparency and visibility** of financial inputs and the payment schedule for all sources.

- **Reduced time and effort** to manage all the payment activities of Ecoaction's volunteers, members, and donors.
- **Optimized operational cost** due to automating tracking and import of payment data.

Being satisfied with the implemented solution, Ecoaction plans to continue collaborating with Infopulse to optimize licensing for Microsoft products and extend operational automation.

Technical Details

The collaboration between Ecoaction and Infopulse started with an in-depth analysis of Ecoaction's business needs and requirements. Since Microsoft Cloud for Nonprofit, Fundraising, and Engagement is developed mainly for US-based organizations, the client's team customized its interface to fit their specific goals. They also automated the import of data entered by potential volunteers through the website form to the database.

Together with the client, we then further fine-tuned processes, rules, and interface aspects of Microsoft Cloud for Nonprofit, Fundraising, and Engagement.

After all the changes made, our client faced two significant challenges that Infopulse addressed:

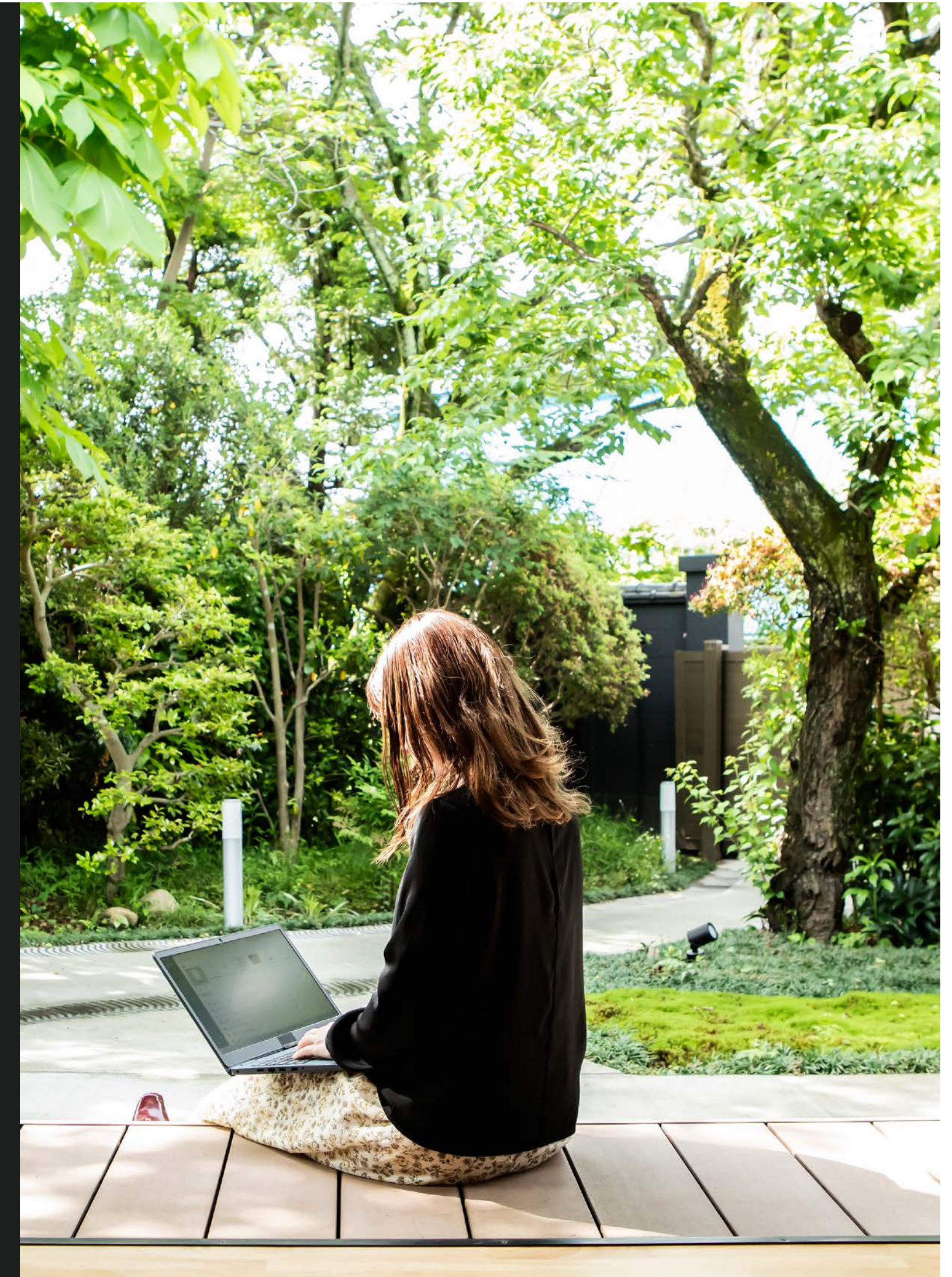
- Tuned permission and role settings in Dynamics 365
- Integrated Power Automate to extend Dynamics 365 functionalities

The next stage was to automate the sync between the company's website and Dynamics 365 to track and manage payments from different types of users made through the website. We used APIs to connect the website and Power Automate to implement the integration.

Based on the payment type and its parameters, the system automatically retrieves the following data:

- Payment
- The intent to pay
- Payment schedule

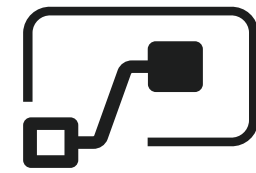
Additionally, based on the organization's terms, the system can now automatically grant a subscription for a newsletter or yearly membership to all users who made payments.



Technologies & Tools



Microsoft Dynamics 365



Microsoft Power Automate



About Infopulse

Infopulse, part of the leading Nordic digital services company Tietoevry, is an international vendor of services in the areas of Business Intelligence, Smart Automation, Infrastructure Services, and Microsoft Services and consulting. Our services cover digital transformation and automation solutions, managed web application services, multi-level technical support, and software integration services for telecom, manufacturing, construction, logistics, agriculture, retail, and other industries. We assist both nonprofit, public, and commercial organizations to reach operational excellence.

Infopulse is trusted by many established brands, such as BICS, Bosch, Allianz Bank, Credit Agricole, Delta Wilmar, ING Bank, LMT, Microsoft, Metinvest, Offshore Norge, OLX, OTP Bank, Santander, SAP, UKRSIBBANK BNP Paribas Group, Vodafone, Zeppelin, and others.

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