



Customer Success Story

The client increased **work productivity** and **customer engagement** by renewing and optimizing the high school Applications & forms.

About the Client

The client is a leading nonprofit Aircraft and pilot organization that advocates for general aviation pilots in the United States. The association support activities of long-term health aviation, educating pilots, non-pilots, and policies.

Benefits

- ✓ We set up the task automation functionality using triggers. This increased the engagement factor and efficiency of forms and approvals.
- ✓ The client can now create the templates for submission emails when the application status is set to "On Hold" and schedule batch classes. This enhances the work productivity and time management of the client's team.

Solution

- DemandBlue added the high school applications **ext fields** and updated the connectors.
- We updated the **POC information**, main office number, **district information**, and **data mapping** in the high school application for the new field data mapping.
- We added the high school Application's **demographic fields** in objects and updated the **demographic updates** along with connectors for
- Our team set up the **agreement approval system**, added the related agreement **approval fields** in Salesforce objects, and updated high school triggers for new **data mapping fields**.
- The team configured the **renewals of fields, sections, and information** to match with the sections in the new school application.
- DemandBlue team created a **new email template** when new form submission took place.
- We added Teacher **Information Form-Teacher** Information related fields in Salesforce objects and updated **teacher information trigger** for the new field data mapping.
- The team configured **Auto send email** and **Auto sign agreement** using DocuSign when the teacher info form gets approved.
- DemandBlue configured the **triggers** for **welcome email** and the teacher's information link to be sent when the application is approved.