

# PUMEX

Americans for the Arts

## Sales Integration

CASE STUDY



### About the Americans for the Arts

The Americans for the Arts (AFTA) is the nation's leading nonprofit organization for advancing the arts and arts education. Their mission is to build recognition and support for the extraordinary and dynamic value of the arts and to lead, serve, and advance the diverse networks of organizations and individuals who cultivate the arts in America.



### Executive Summary

AFTA had migrated to a SaaS solution, Salsa, to help take and manage donations to the organization. As part of the implementation of this solution, AFTA asked for Pumex's help to integrate the solution with their AMS, netFORUM. After review of the Salsa API's and high level requirements from AFTA, it was decided that the AFTA Drupal environment would be used as a middle layer to manage business rules, logic, and approval process workflows.

**AFTA needed to match donations to their member database based on multiple criteria and be able properly append the transactions in the event the proper taxonomy was not applied by Salsa.**



### The Challenge

AFTA had very specific requirements to ensure proper donation tracking to the corresponding fund, campaign, and appeal taxonomy types where each transaction needed to be reviewed and accepted. It was decided that by leveraging the existing Drupal infrastructure as a middle layer for approval and review of the donations, Pumex could significantly cut down on implementation costs and easily create the necessary roles for staff already existing in the system.



## The Solution

The end result of implementing this solution was an integration that could:

- Pass donation data from Salsa to netFORUM and append with the corresponding fund, campaign, and appeal type.
- Provide an approval process in Drupal through which AFTA staff can ensure the correct taxonomy is being applied to the donation.
- Provide the staff a way to easily add proper taxonomy as new campaigns, funds, or appeal codes are added to nF.
- Utilize emails provided during the donation process to try and match constituents with previous donations within nF.



## Immediate Results

- Pumex implemented a solution that allowed AFTA to quickly and easily approve and import donation data into their membership system.
- By utilizing Drupal, Pumex helped AFTA significantly reduce staff training on the use of the system as they were already intimately familiar with the platform.
- The solution was implemented on time, within budget, and to quality expectations.

## Future Plans

Pumex is considered an integral partner to the ongoing success of AFTA's IT projects. We are helping the organization across multiple areas of their IT infrastructure, including CIO/CTO support and currently working on migrating data from their legacy netFORUM AMS to their new AMS and integrating all required 3<sup>rd</sup> party solutions.

