



## Bespoke Salesforce-integrated Direct Debit management and card payment solution enables flexible charitable donations

First established in 1962, the Catholic Agency for Overseas Development (CAFOD) are the official Catholic aid agency for England and Wales. Working with over 500 partners in more than 40 countries across the globe to reduce poverty with practical and spiritual assistance, CAFOD is part of one of the largest aid networks in the world.

Proudly operating as a charitable organisation guided by the Catholic faith, CAFOD rely heavily on the regular donations of individuals and organisations to make this vital aid work a reality. When the continuation of these donations was threatened by the withdrawal of support

for their Salesforce Direct Debit and card payment solution, CAFOD found themselves needing a new payment solution.

With over 32,500 Direct Debits and 11,000 card payment donations taken in the last year alone, CAFOD needed a Salesforce-integrated solution that would support the processing of Direct Debits and card payment donations. Vitally, it would need to allow CAFOD to continue to collect Direct Debit donations from their supporters without interruption and similarly, maintain CAFOD's ongoing ability to take card payment donations through various off-line channels.

**55+**  
years of  
experience

**165+**  
countries around  
the world helped  
annually

**£52.4m**  
raised through  
fundraising and  
donations in  
2021

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Anna Hoskins, CAFOD





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## Our DDMS & card payment solution

Already a satisfied customer, CAFOD first came across SmarterPay on an approved list of Bacs suppliers back in 2017. At the time they were looking to replace their existing desktop Bacs submission software due to unreasonable upgrade charges from their previous vendor.

Selecting SmarterPay Cloud as a suitable replacement in 2018, Anna Hoskins, Head of Technology and Business Analysis at CAFOD explained the decision to approach SmarterPay once more:

“The vendor of our Salesforce Direct Debit/Card Payment solution gave notice that they would be ceasing support and that we would therefore have to migrate to a new solution from them or to a different provider. We were already aware that SmarterPay had a Salesforce Direct Debit/Card Payment solution due to our existing relationship and, after evaluating this solution against the new solution offered by the incumbent, and those offered by other vendors, selected SmarterPay as the replacement.”

SmarterPay were able to provide a bespoke [Direct Debit Management System \(DDMS\)](#) with full Salesforce

integration which also included a [card payment package](#).

Primarily utilising a web-based sign-up page on the CAFOD website, the solution allows supporters to make one-off or recurring donations using either Direct Debit or card payment. Direct Debits originate online, via telephone and by payment links, but are all stored and processed in the same way on Salesforce.

The DDMS works around fixed collection days, with 96% of Direct Debits scheduled to collect on a monthly basis but the intervals can also be quarterly and annually, which provides full flexibility for the CAFOD payment runs each week.

As part of the implementation for card payments, CAFOD chose to sign up with SmarterPay's partners at Opayo to manage the merchant service, including the payment gateway solution. This allowed them to be able to divide their card payment options between their mail order, telephone payments and other offerings. It also allows a one-stop process for CAFOD's payment options to be processed, handled and reconciled on a single platform within Salesforce.

**32,500**

Direct Debit payments annually

**11,000**

card payments taken annually

**100%**

Direct Debit automation

“The SmarterPay solution solved the problem we had encountered and delivered functionality beyond that afforded by our previous solution.”

Anna Hoskins, CAFOD



“When we had questions or issues, escalation channels were in place to allow the right people to resolve them.”

Anna Hoskins, CAFOD

## Continued collection of payments

The solution was implemented over a three-month period and split into separate Direct Debit and card payment stages. Particularly impressed with the speed and collaborative deployment of the solution, Anna recalled:

“The speed with which the SmarterPay team were willing to work with us was phenomenal. They worked with our in-house developers on the implementation plan and execution, allowing us to make the best use of internal development expertise alongside their own technical specialists. It was clear that the SmarterPay team were committed to the success of our project. Regular calls and meetings were in place to progress the implementation and escalation channels available for quick resolution of any issues.”

As a result of the SmarterPay DDMS integration with Salesforce, CAFOD

were able to continue to collect Direct Debits without interruption and take card payments. CAFOD also saw an immediate benefit in the ease of Direct Debit submissions as the SmarterPay solution included a Bacs Bureau service. This meant they are no longer had to upload submission files and download return files manually, saving time and money.

Speaking about the expected longer-term benefits and her overall SmarterPay experience, Anna explained:

“The main benefit we expect to see is a longevity of the solution and a healthy return on the investment we have put in to incorporate the solution into our Salesforce CRM. We have found SmarterPay to be competitive, both in terms of price and the overall solution and service offered. We would highly recommend SmarterPay to other businesses.”



### Customer Profile

CAFOD is the official Catholic aid agency for England and Wales. Working with people of all faiths, CAFOD and their 500 overseas partners in more than 40 countries across the world work to bring hope, compassion and solidarity to poor communities. Inspired by scripture, Catholic social teaching and the experiences and hopes of people living in poverty, CAFOD works to build a safe, sustainable and peaceful world.

[www.cafod.org.uk](http://www.cafod.org.uk)

## Our DDMS & card payment solution

SmarterPay's DDMS gives you full control of the Direct Debit lifecycle and includes:

- ✓ Direct Debit set-up
- ✓ Mandates and branded notifications
- ✓ Modulus checking at point of set-up
- ✓ Full integration
- ✓ New instructions
- ✓ Payment Schedule
- ✓ Automated Submissions
- ✓ Auto-account updates
- ✓ Automated represents
- ✓ Cancellations

Our comprehensive card payment solution provides transparent payment history for Moto and eCommerce card payments and includes:

- ✓ Deferred payments
- ✓ Single payments
- ✓ Refunds
- ✓ Triggers and after payment processing
- ✓ Repeat payments



For more information about SmarterPay DDMS or any other products and services, please get in touch on:

Phone: 01482 240886  
Email: [info@smarterpay.com](mailto:info@smarterpay.com)

[www.smarterpay.com](http://www.smarterpay.com)



SmarterPay Ltd, Utility House, 32-36 Prospect Street, Hull, HU2 8PX