ტენდერი

მსოფლიოში უდიდესი ჰუმანიტარული ქსელის, წითელი ჯვრისა და წითელი ნახევარმთვარის საერთაშორისო ფედერაციის წევრი - საქართველოს წითელი ჯვარი, უკვე 107 წელია ახორციელებს ჰუმანიტარულ საქმიანობას ქვეყანაში და ეხმარება გასაჭირში მყოფ ადამიანებს, როგორც მშვიდობიან პერიოდში ასევე საგანგებო სიტუაციებისა და პანდემიების დროს.

საქართველოს წითელი ჯვრის საზოგადოება ზრუნავს და ორიენტირებულია ადამიანთა ტანჯვის შემსუბუქებაზე და სიღარიბისაგან და მცდარი შეხედულებებისაგან თავისუფალი გარემოს შექმნის ხელშეწყობაზე. საქართველოს წითელი ჯვრის პრიორიტეტული მიმართულებებია კატასტროფების მართვა, ჯანდაცვა და სოციალური მომსახურება, მოხალისეობრივი და ახალგაზრდული აქტივობები და ორგანიზაციული განვითარება.

2023 წლის სექტემბრიდან, საქართველოს წითელი ჯვრის საზოგადოება წარმატებით ახორციელებს “პირისპირ” (F2F) პროექტს. „პირისპირ“ არის რესურსების მობილიზების ერთ-ერთი საშუალება და საქართველოს წითელი ჯვრის საზოგადოება არის პირველი ორგანიზაცია საქართველოში, რომელმაც დაიწყო აღნიშნული მეთოდოლოგიით რესურსების მობილიზება.

საქართველოს წითელი ჯვრის საზოგადოების „პირისპირ“ (F2F) პროექტი ჩამოყალიბდა წითელი ჯვრის და წითელი ნახევარმთვარის მოძრაობის მიერ სხვადასხვა ქვეყანაში მიღებული გამოცდილების მიხედვით. რესურსების მობილიზების აღნიშნული მეთოდი მოითხოვს უშუალო ურთიერთობას და კომუნიკაციას პოტენციურ ინდივიდუალურ დონორებთან და პირდაპირი გზაა დონორთან ურთიერთთანამშრომლობის შესაქმნელად, ნდობის გასამყარებლად და საზოგადოებაში ქველმოქმედების კულტურის ჩამოსაყალიბებლად.

პროექტის მიზანია საქართველოს წითელი ჯვრის საზოგადოებამ გრძელვადიანი და რეგულარული დონორები შეიძინოს,ისეთი აქტივობების და სერვისების მხარდასაჭერად როგორიცაა: შინმოვლა, სადაც 550-ზე მეტი ბენეფიციარი იღებს უფასო სერვისს, კატასტროფებზე მზადყოფნა და რეაგირება, სოციალური დღის ცენტრები, საერთაშორისო ჰუმანიტარული სამართლის გავრცელება, ადვოკატირება, სისხლის დონაციის შესახებ ცნობიერების ამაღლება, ორგანიზაციული განვითარება და სხვა.

სამუშაო აღწერილობა გთხოვთ იხილოთ ინგლისურად :

**Terms of References**

**Foundy Integration**

Georgian Red Cross

**1. Background and Objectives**

**Project Background**

The Georgian Red Cross Society (GRCS) uses Salesforce Sales/Service Cloud with the Nonprofit Success Pack (NPSP) to manage its fundraising activities. Over the past few years, the system has undergone multiple rounds of enhancements and optimizations to better support the organization’s fundraising strategy.

Currently, the Salesforce system includes the following key components:

1. A robust data model supporting both individual and corporate fundraising, with extensive use of custom fields, custom objects, and process automation for record creation and field calculation.
2. Active integrations with two payment platforms, iRaiser and Payze, both connected via API. The Payze integration also supports website-based donations using a pre-request mechanism to generate initial records and a payment session ID.
3. Automated transactional email flows covering key donor communications such as:

* Welcome messages
* One-time donation acknowledgments
* Recurring donation confirmations
* Cancellation notifications

Each message can be customized with campaign-specific templates.

1. Donation tracking is structured using a combination of standard and NPSP objects: Recurring Donation, Opportunity, and Payment.
2. A comprehensive reporting and dashboard system for monitoring performance and campaign effectiveness.

**Project Objective**

The objective of this project is to integrate Foundy, a new local payment platform, into the existing Salesforce environment while preserving the integrity and functionality of the current solution. Additionally, a donation webpage must be developed to support payments via Foundy and provide donors with a smooth and secure giving experience.

A key requirement is that the management of recurring donations must be fully controlled from within Salesforce. This includes the ability to initiate new payment requests, update subscription parameters (such as donation amount or billing date), and handle cancellations or failed transactions directly from the CRM. Foundy will act as the execution layer, while Salesforce remains the central source of truth and orchestration point for all recurring payment logic.

**2. Scope of Work**

### **2.1 Integration of Salesforce with Foundy**

Design and implement a secure and scalable integration between Salesforce and the Foundy payment platform to support full subscription lifecycle management from within the CRM. This integration must rely on real-time API communication and allow administrators to manage all key operations directly in Salesforce.

The integration must include the following capabilities:

1. **Foundy Configuration**

Configure the Foundy platform to send webhook notifications (event callbacks) to Salesforce once the payment is processed. This includes successful payments, subscription activation, failures, cancellations, and other relevant statuses.

1. **Webhook-Based Event Notifications**

Establish a webhook-based mechanism for receiving real-time event notifications from Foundy. Events may include (but are not limited to):

* Payment received
* Subscription activated
* Subscription cancelled
* Payment failed

1. **Intermediate Object for Webhook Processing**

Implement an intermediate object in Salesforce to temporarily store incoming webhook payloads. Business logic should process these records asynchronously and update relevant NPSP objects such as **Recurring Donation**, **Opportunity**, and **Payment**.

1. **Pre-Request Handling from Website Donations**

Support pre-request logic triggered by the donation webpage:

* Match donor data (by email and/or phone) against existing Contacts to avoid duplicates
* Create a new Contact if no match is found
* Initiate creation of a related **Opportunity** and **Recurring Donation** where applicable
* Return a structured response to the website to enable it to proceed with forming the payment request to Foundy.

1. **Refund Processing**

Enable Salesforce users to initiate a refund request to Foundy. Once processed, the relevant Salesforce records (e.g., Payment, Opportunity) should be updated to reflect the refunded status.

1. **Billing Cycle Management (Intra-Month Retries)**

Configure logic in Salesforce to initiate payment collection requests on a recurring basis according to the defined subscription schedule. The solution must :

* Support a configurable retry sequence within the same billing period (e.g., retry on day +1, +5, +15 after a failed attempt)
* Respect Foundy's retry policy while enabling logic to track and manage each attempt
* Provide visual representation of the retry timeline and status for administrators
* Allow non-technical users to configure the retry logic without code
* Automatically re-initiate payment attempts until the target number of successful charges is reached, or until the maximum retry threshold is exceeded
* Log and flag failed attempts for follow-up if resolution is required

1. **Subscription Cancellation from Salesforce**

Allow administrators to cancel a subscription from within Salesforce. This action must trigger a cancellation request to Foundy and update all related records accordingly.

1. **Subscription Parameter Updates**

Provide the ability to update key subscription parameters from Salesforce, such as:

* Donation amount
* Payment (billing) date
* Status (active, paused, cancelled)

1. **Status Tracking with Failure Reasons**

Ensure that the **Recurring Donation**, **Opportunity**, and **Payment** records clearly reflect their current statuses.

Failed payments must include error messages or codes returned by Foundy, mapped to understandable reasons for users (e.g., "Card expired", "Insufficient funds", "Bank declined")

1. **Card Expiry Tracking**

If available from Foundy, track the expiration date of payment cards linked to subscriptions.  
Store card expiration data in a related object.

Provide alerts or flags in Salesforce for expiring cards to enable proactive communication with donors.

### **2.2 Development of a Donation Website**

Design and implement a donation microsite that enables donors to submit one-time or recurring contributions via the Foundy payment system. The site must be aligned with the organization’s branding and include both a donation form and informational content that highlights the impact and importance of donor support.

The solution must include the following components:

#### **Donation Page Functionality**

* **Donation Form**
* Frequency selection:  
  Allow users to choose between one-time and recurring donations.
* Amount selection:  
  Present several predefined donation amounts, along with an open field for custom entries.
* **Contact Information Collection**:  
  Include the following fields, with proper validation rules:
* First Name
* Last Name
* Phone Number (format validation)  
  Email Address (format validation and required field)
* Date of Birth (optional or as required)
* **Confirmation Screen**:  
  Before initiating the payment, display a summary of the entered information and selected donation amount/frequency for donor confirmation.

#### **CRM Integration (Pre-Request)**

Upon confirmation, the site must send a **pre-request to Salesforce**, which will:

* Check for existing Contacts using phone and/or email
* Create a new Contact if no match is found
* Create relevant records for the selected donation (Opportunity, Recurring Donation)
* Return a unique ID or payload required for forming the request to Foundy

#### **Foundy Payment Widget Integration**

Using the response from Salesforce, the site must construct and initiate the request to Foundy’s widget to complete the payment process.

#### **Informational Content**

Provide space on the page for context and storytelling:

* Highlight the purpose of the campaign
* Explain how donations will be used
* Reassure donors about the security and transparency of the process

#### **Deployment & Handover**

Deliver the complete website codebase along with:

* A clear **deployment guide** for installing the website on the organization’s server or hosting environment
* Instructions for **domain setup and configuration**

**2.3 Integration into Existing Email Communication Flows**

Ensure that donors making contributions via the Foundy payment system receive the same transactional email communications as those using existing platforms, fully aligned with the current Salesforce logic and user experience.

The following email scenarios are currently supported and must be preserved for all donation channels, including Foundy:

* Welcome Email – upon the successful creation of a recurring donation
* Thank You (One-Time) – after a one-time donation is received
* Thank You (Recurring) – after the first successful payment in a recurring schedule
* Cancellation Confirmation – when a recurring donation is cancelled

**Requirements**

Ensure that events originating from Foundy lead to the correct email communications through the established automation framework.

The logic for triggering emails must remain consistent with the current approach, including record-level conditions and campaign-based template selection.

Communications must reflect accurate donor and transaction details, regardless of the payment provider used.

**2.4 Enhancements to Reporting and Dashboards**

Expand the existing Salesforce reporting and dashboard framework to incorporate donation data processed via the Foundy payment platform, ensuring unified visibility across all channels.

**Requirements**

* Ensure that all relevant Foundy-related data points are captured and reflected consistently within the existing reporting model.
* Validate that consolidated reports (e.g. total income, recurring vs. one-time breakdown, campaign performance) continue to function as expected, now including Foundy transactions.
* Create dedicated report variants to analyze Foundy transactions separately, following the structure and logic of current source-specific dashboards.
* Support ongoing maintainability by ensuring new data is seamlessly integrated into the reportable data model without disrupting existing metrics.
* Approximately 30 active reports and dashboards are currently in use and must be reviewed as part of the implementation to confirm completeness and accuracy.

**3. Proposal Requirements**

Vendors responding to this Terms of Reference are expected to provide the following information:

* **High-Level Solution Description**

A concise overview of the proposed technical approach, including key components of the integration and website implementation. The description should cover how the solution addresses the requirements outlined in sections 2.1–2.4.

* **Effort and Resource Estimate**

An estimate of the total effort required, broken down by role (e.g., Salesforce Developer, Frontend Developer, QA). Indicate the assumed level of involvement from the client side, if applicable.

* **Implementation Timeline**

A proposed timeline for implementation, including key milestones and dependencies. If your plan includes phased delivery, please specify the structure of each phase.

* **Cost Estimate**

A detailed cost breakdown, specifying hourly or daily rates by role and the total estimated cost.

To submit your application and proposal, please send them to: **ilabartkava@redcross.ge**

For any inquiries, please do not hesitate to contact us at: **+995 599 40 99 06**

Submission deadline : 10th of July, 2025