AISC Connects Certification, Forms, And Documents To Salesforce

Industry: Nonprofit

Customer Since: 2023

Products: Enterprise Suite

Features: Forms, Doc Gen, Automation

COMPANY BACKGROUND

The American Institute of Steel Construction (AISC) is a nonprofit organization with more than 100 years of history. It supports professionals working with American steel through manuals, technical documentation, and design resources used across bridges, buildings, parking structures, and other construction projects.

AISC'S CHALLENGE

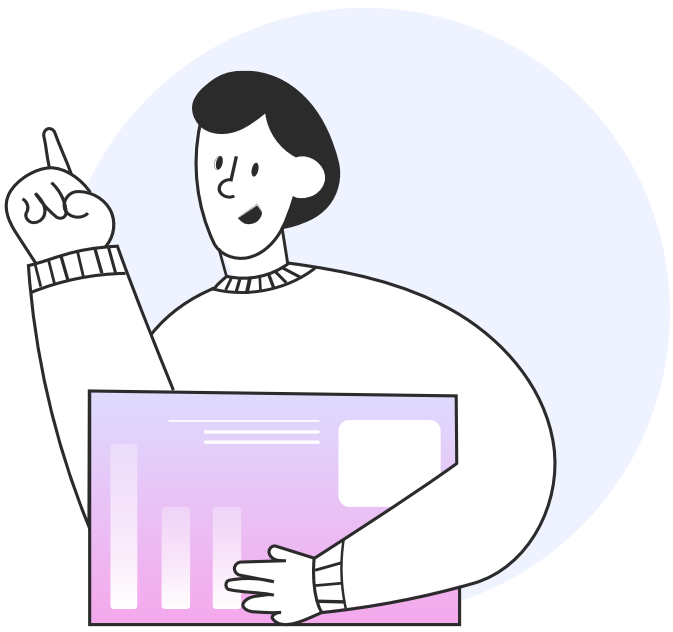
Salesforce sits at the center of AISC's membership, certification, and engineering work, but the organization needed to extend Salesforce across public and internal processes without requiring every interaction to happen inside the platform.

The organization needed forms, document generation, and structured workflows to handle complex certification processes, generate accurate certificates with QR verification, manage approved company changes, and support external users, auditors, certificates, and invoices across its core processes.

TITAN'S SOLUTION

AISC implemented Titan's Enterprise Suite to extend Salesforce across public forms, certification workflows, document generation, and internal processes. Titan generates certificates from Salesforce data, with QR codes linking to verification pages.

Titan routes company changes through approvals and supports complex public and auditor forms. Internally, 98 staff use Titan to generate invoices directly from Salesforce data and maintain accurate records.



KEY RESULTS

- **Verified Documents:** Certificates are generated from Salesforce data and include a QR code connected to a verification page. Recipients can scan the code to confirm that certification is valid and active.

- **Public Website Forms:** Titan's Salesforce-connected forms allow AISC to collect information from external users through its website. Visitors complete public-facing web forms, with data pulled from or written back to Salesforce.

- **3+ Years with Titan:** AISC has used Titan for more than three years across forms and document generation, supporting certification, invoicing, auditing, public-facing processes, and Salesforce approval workflows.

- **Reviewed Change Control:** Company information changes follow a controlled review process before being applied. Titan captures the required information and routes each request to the appropriate person before updates can affect certification data.

- **Governed Form Capture:** AISC uses complex Salesforce forms for auditors, with submitted data saved in its CRM.

"There's no other tool that we have found that can do the breadth of the functionality that we get from Titan." - Sue Thomas, Director of IT at The American Institute of Steel Construction