October 11, 2023

Latest Updates in the Salesforce 2024 Winter Release for Nonprofits

MEET

Our Presenters

James Moore

Senior Consultant, Consulting
Industry Experience: 2 years

Peter Kim

Senior Consultant, Consulting
Industry Experience: 10 years

KNOWLEDGE

Learning Objectives

See an overview of the recent release features and updates

Learn about enhancements that can streamline your processes

Understand how to manage the latest release to improve productivity

Exploring New Areas

Agenda – Nonprofit Focused

- Nonprofit Cloud
- Donor Profile and Management
- Fundraising and Gift Management
- Real-Time Analytics on Fundraising

Exploring New Areas

Agenda – User Focused

- Display Only Salesforce Events on Calendar
- Personalize Sales Emails with Einstein GPT for Sales
- Transfer Dashboard Ownership
- Report on Members of a Public Group and Queue
- Asset Hierarchy

Exploring New Areas

Agenda – Admin Focused

- Migrate to Hyperforce with Hyperforce Assistant
- Permission Set Summary View
- Report on Permission Set Assignment
- Dynamic Forms (GA)
- API Names in Permission Sets
- Salesforce Backup and Restore

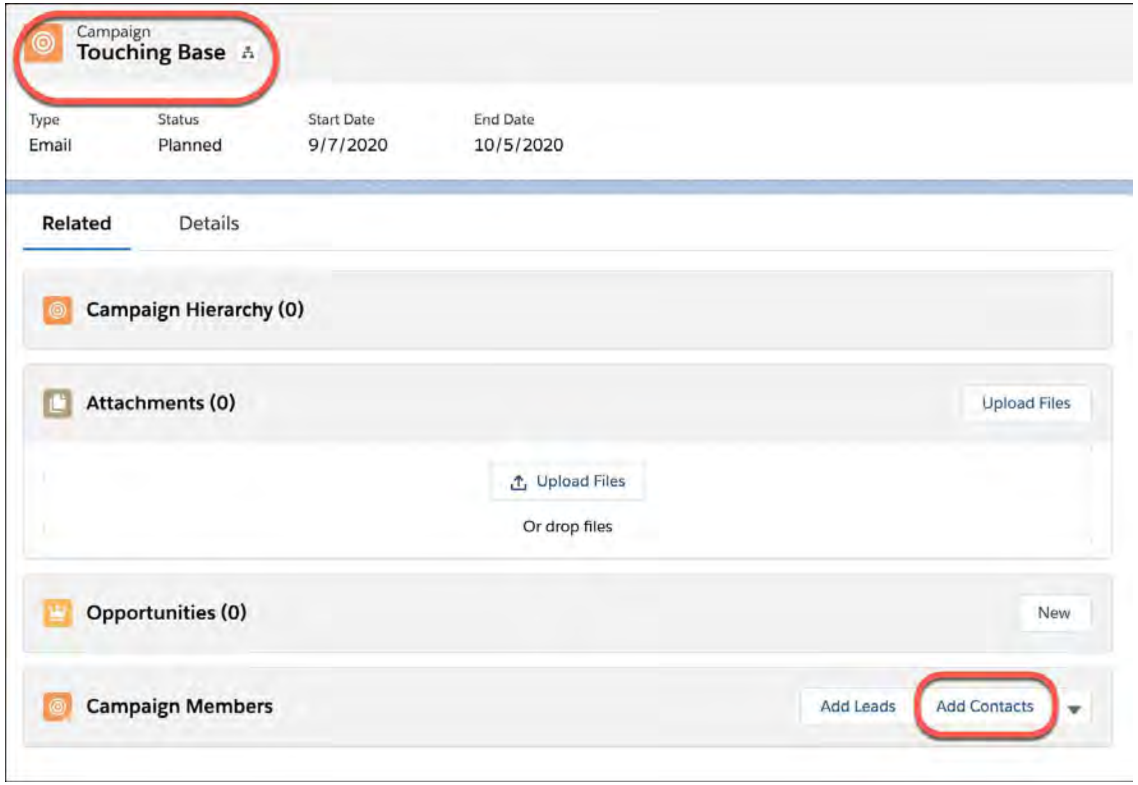
More Salesforce Nonprofit Focused

Donor Profile

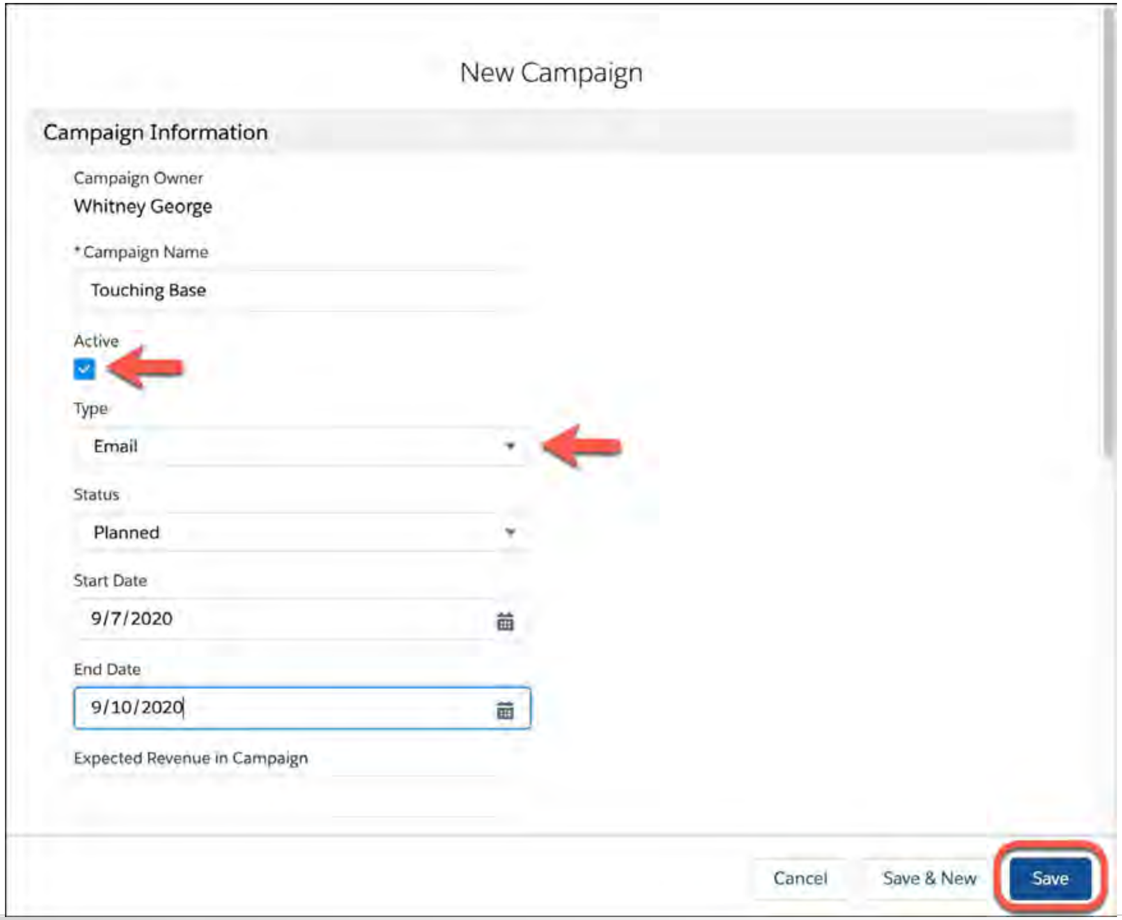
- Create a timeline of your relationship with donors, manage wealth and giving information, and add customized alerts to their profile so you can know when important events are occurring in real time
- Fundraisers can manage their relationships with individual donors with all information in one place
- Help increase donor retention

Fundraiser Portfolio Management

- Create, manage and assign ownership of portfolios to Fundraisers
  - Utilize portfolios to view tasks and manage your donor relationships from a single view
- Manage and maintain high touch relationships with donors while ensuring no tasks go unfinished
- Increase in Dollars Raised



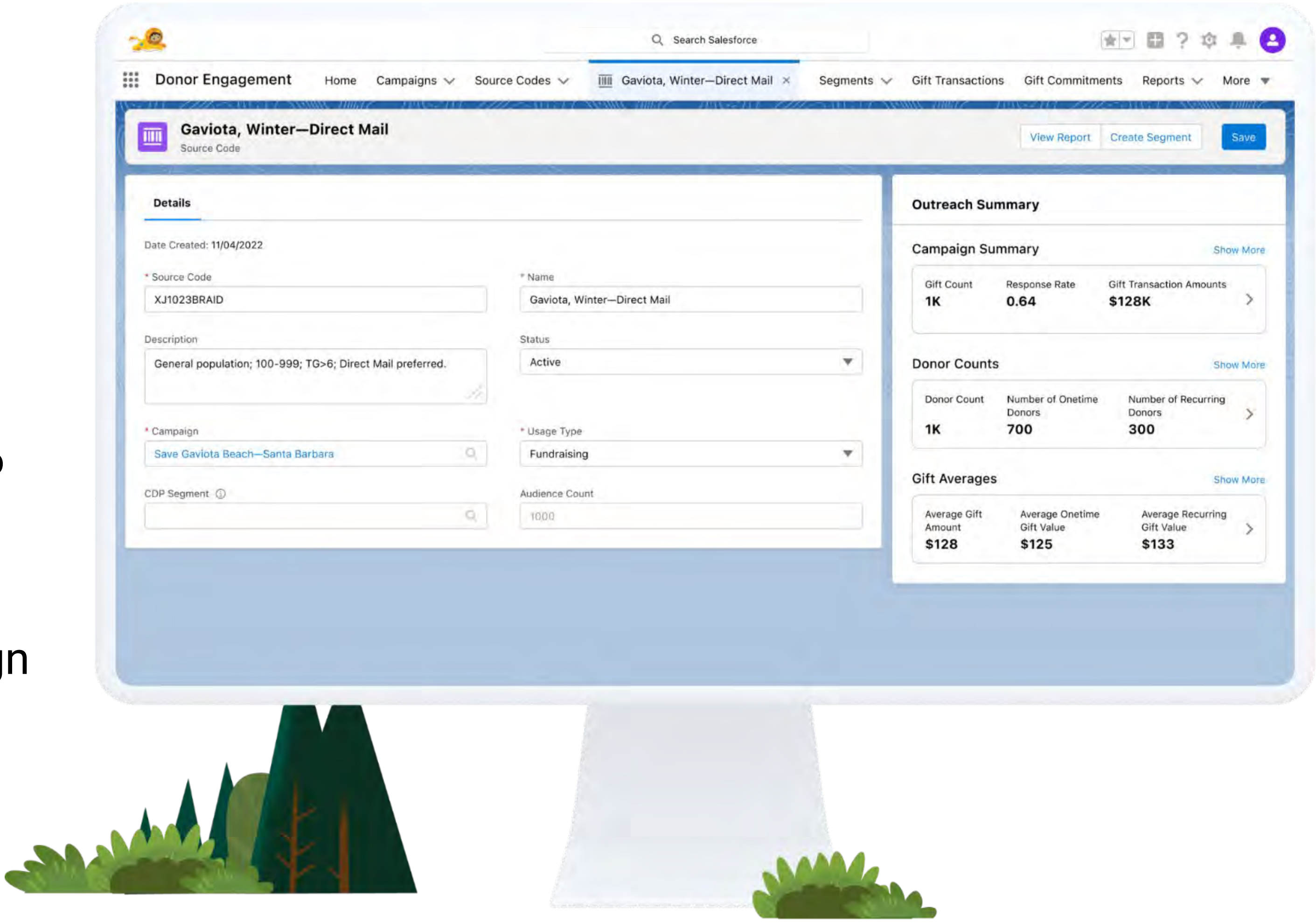
Campaign Creation



- Organize and track the organizations outreach efforts and donor solicitations
- Increase visibility into outreach performance
- Increased granularity

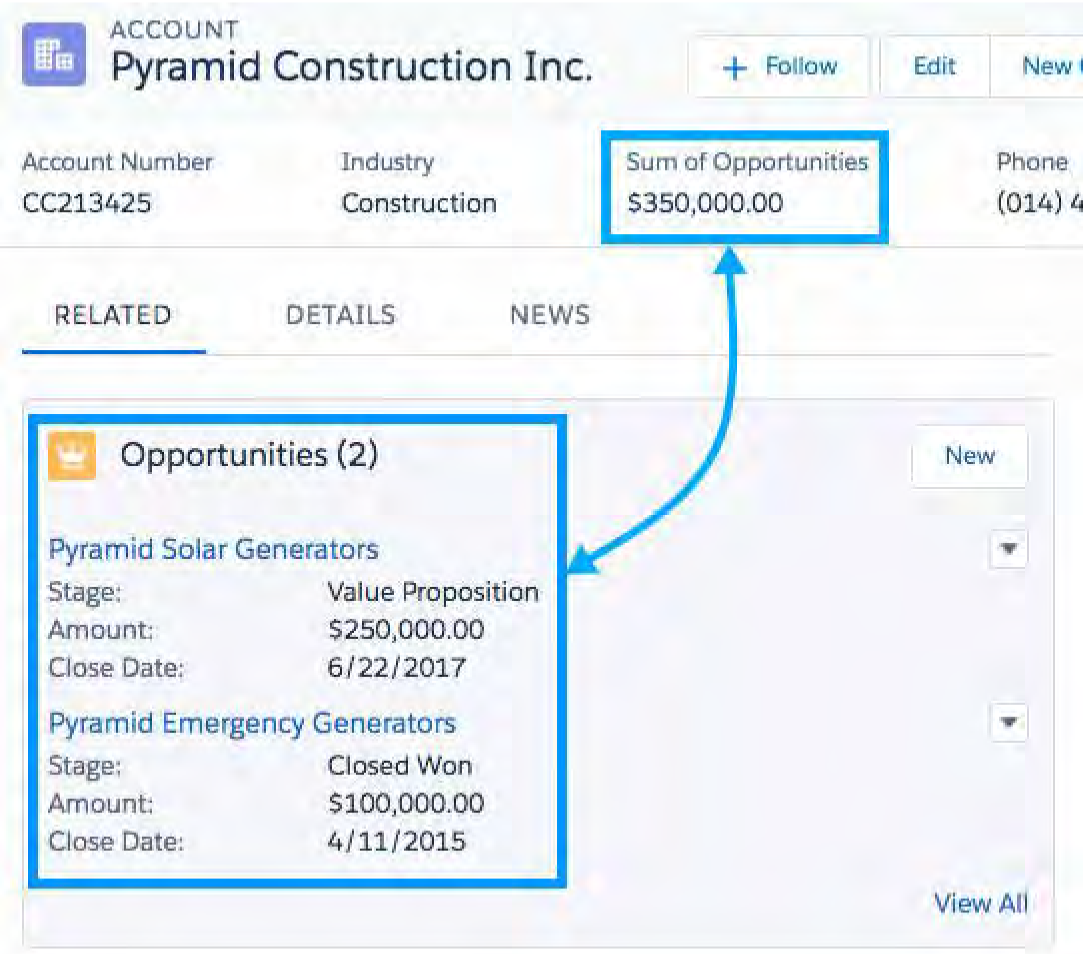
Source Codes

- Add one or many source codes to a campaign to track the specific messages, segments and channels within a campaign
  - Assign a focus segment and audience count to each Source Code to track ROI
- Track and measure the performance of individual outreach efforts within a Campaign to understand performance and track ROI
- Increase outreach performance
- More granular appeal tracking



Fundraising Roll Ups

- View fundraising summary data on record homepage via a customizable component
- Provide industry standard rollup information for donor, household, gift designation and campaign/source codes to help guide donor stewardship and track outreach performance
- Real time view of fundraising transaction performance



Gift Commitment Management

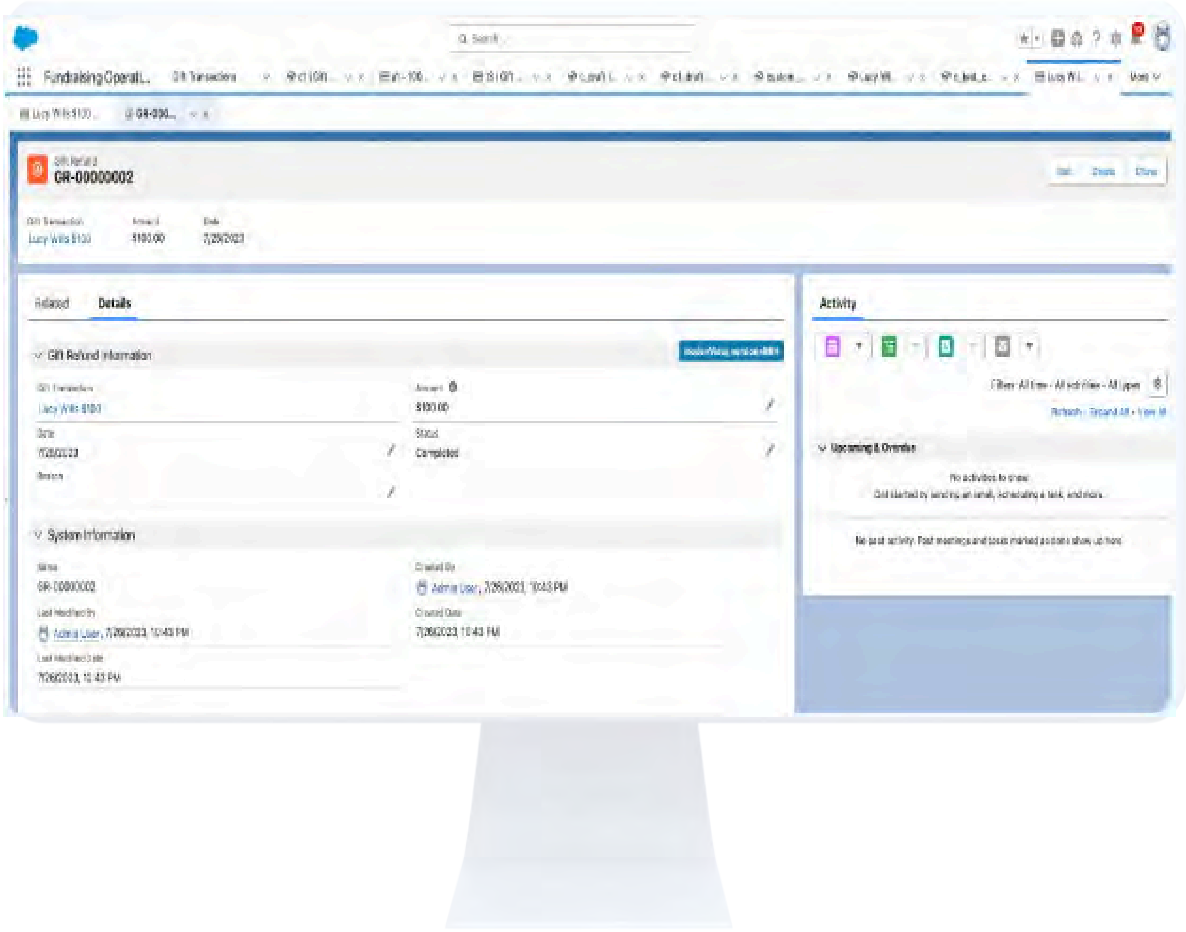
- Create a Gift Commitment, associate Schedules and monitor its Transactions
  - Upgrade/downgrade, update payment method, update dates or pause/resume the Commitment payment using the shipped Actions
  - Monitor the auto-update of Commitment Status
- Tracking fulfilment of complex gifts to be paid in instalments, tracking their status and payment schedule, and performing support operations such as upgrades/downgrades and pauses
- Increase in Dollars Raised

Gift Allocations

- Leverage the Gift Default Designation and Gift Transaction Designation records for allocation
- Allocating a gift among one or more Designations, and updating the Designation balances when transactions are paid
- Better management of distribution of funds
- Better planning of Fund targets for different programs/purposes
- Accurate reconciliation with Finance

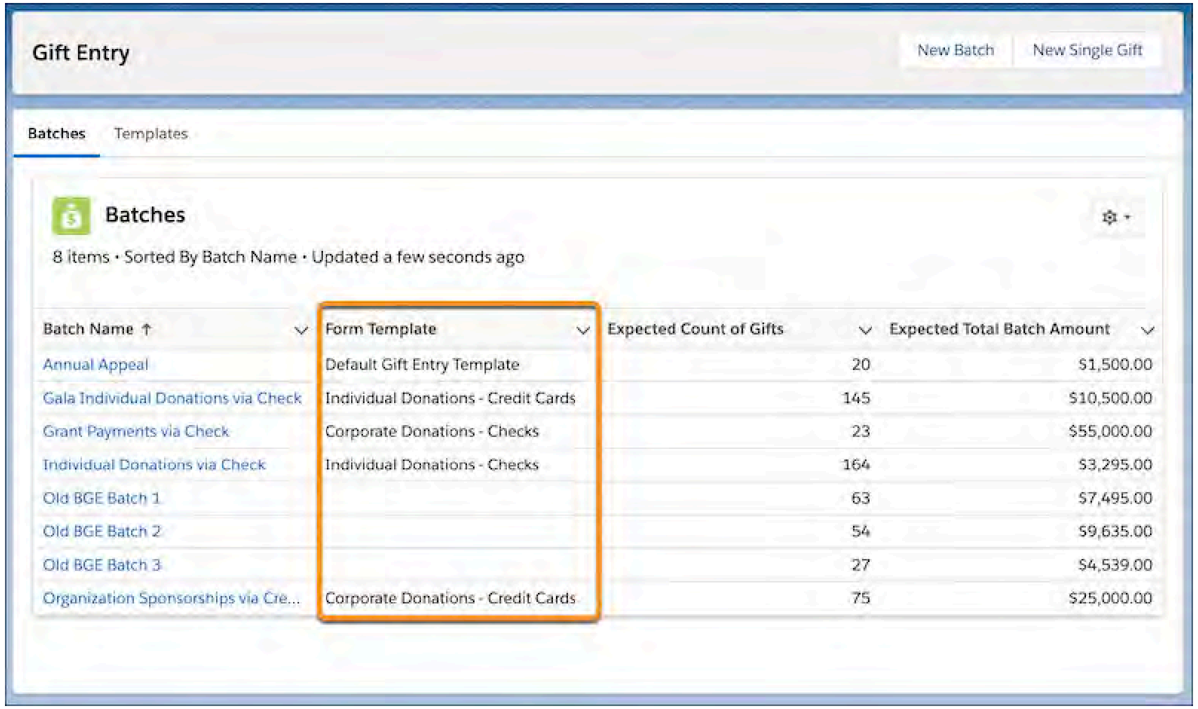
Refund Support

- Use the Gift Refund object to specify refund information, track refund status and track the refunded amount at the Gift Transaction
- Partial or full refunding of a gift transaction and updating of designation balances when the refunded amount is withdrawn
- Increased donor retention due to efficient refunds when requested



Gift Entry

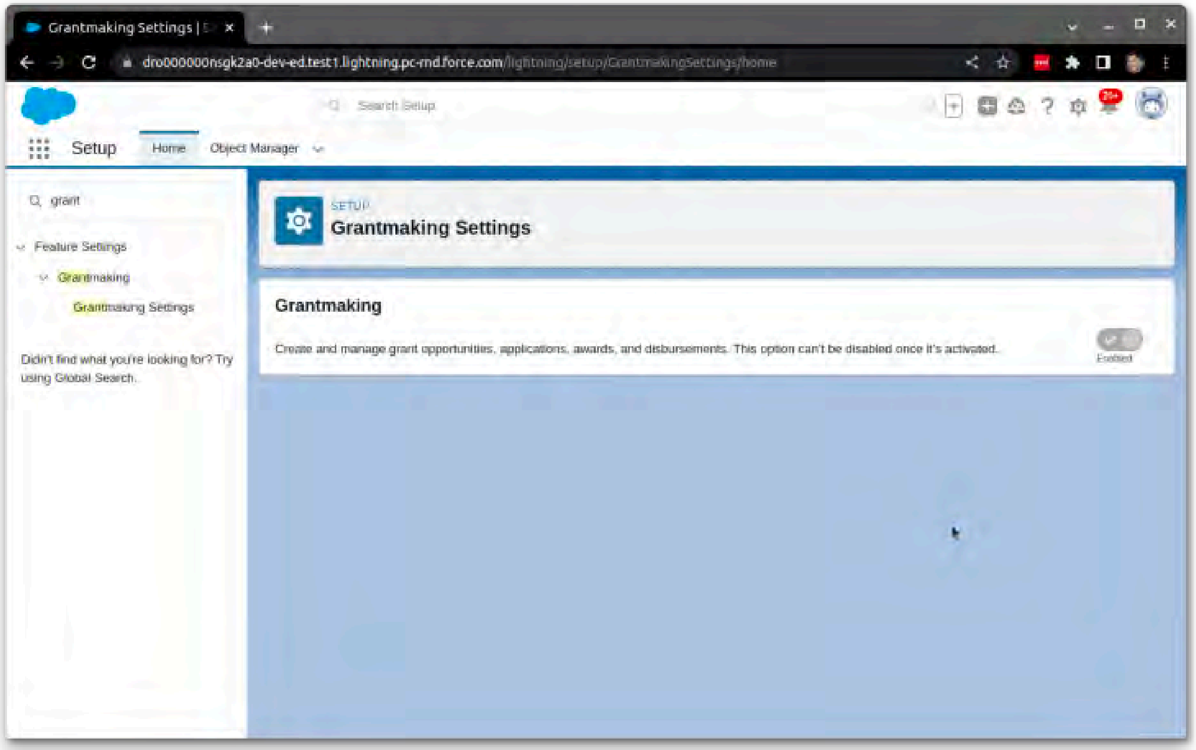
- Create a batch and enter many gifts quickly
  - Our automation will do the work of auto-populating commitment, campaign, designation and more
  - Then, verify that the entered information matches the estimated information and process the batch
  - Or create a single gift entry
- Every day, nonprofits hand-enter gifts
  - With Gift Entry, users can do it as quickly and accurately as possible



Batch Name	Form Template	Expected Count of Gifts	Expected Total Batch Amount
Annual Appeal	Default Gift Entry Template	20	$1,500.00
Gala Individual Donations via Check	Individual Donations - Credit Cards	145	$10,500.00
Grant Payments via Check	Corporate Donations - Checks	23	$55,000.00
Individual Donations via Check	Individual Donations - Checks	164	$3,295.00
Old BGE Batch 1		63	$7,495.00
Old BGE Batch 2		54	$9,635.00
Old BGE Batch 3		27	$4,539.00
Organization Sponsorships via Cre...	Corporate Donations - Credit Cards	75	$25,000.00

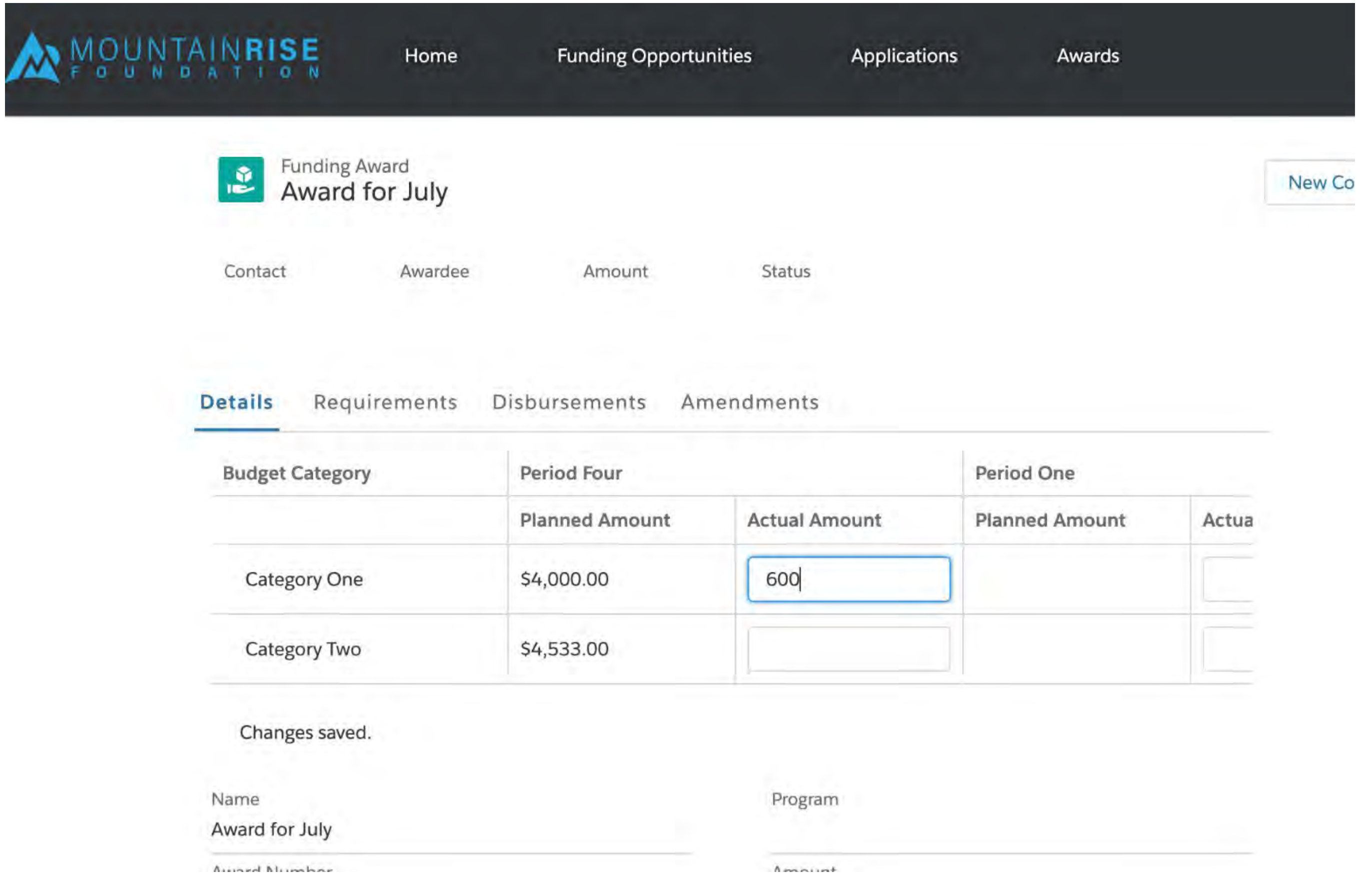
Data Model Additions

- Relate multiple levels of programs and funding opportunities
- Track grant award and amendment contract details
- Track Program and Funding Opportunity hierarchies
  - Add hierarchy with the Parent Program field on Programs and the Parent Funding Opportunity field on Funding Opportunities
- Link funding awards and funding award amendments to contracts with the Contract field
- Use Compliant Data Sharing with Grantmaking records
- Turn on Compliant Data Sharing for Grantmaking objects: Budget Participant, Funding Award Participant, and Individual Application Participant



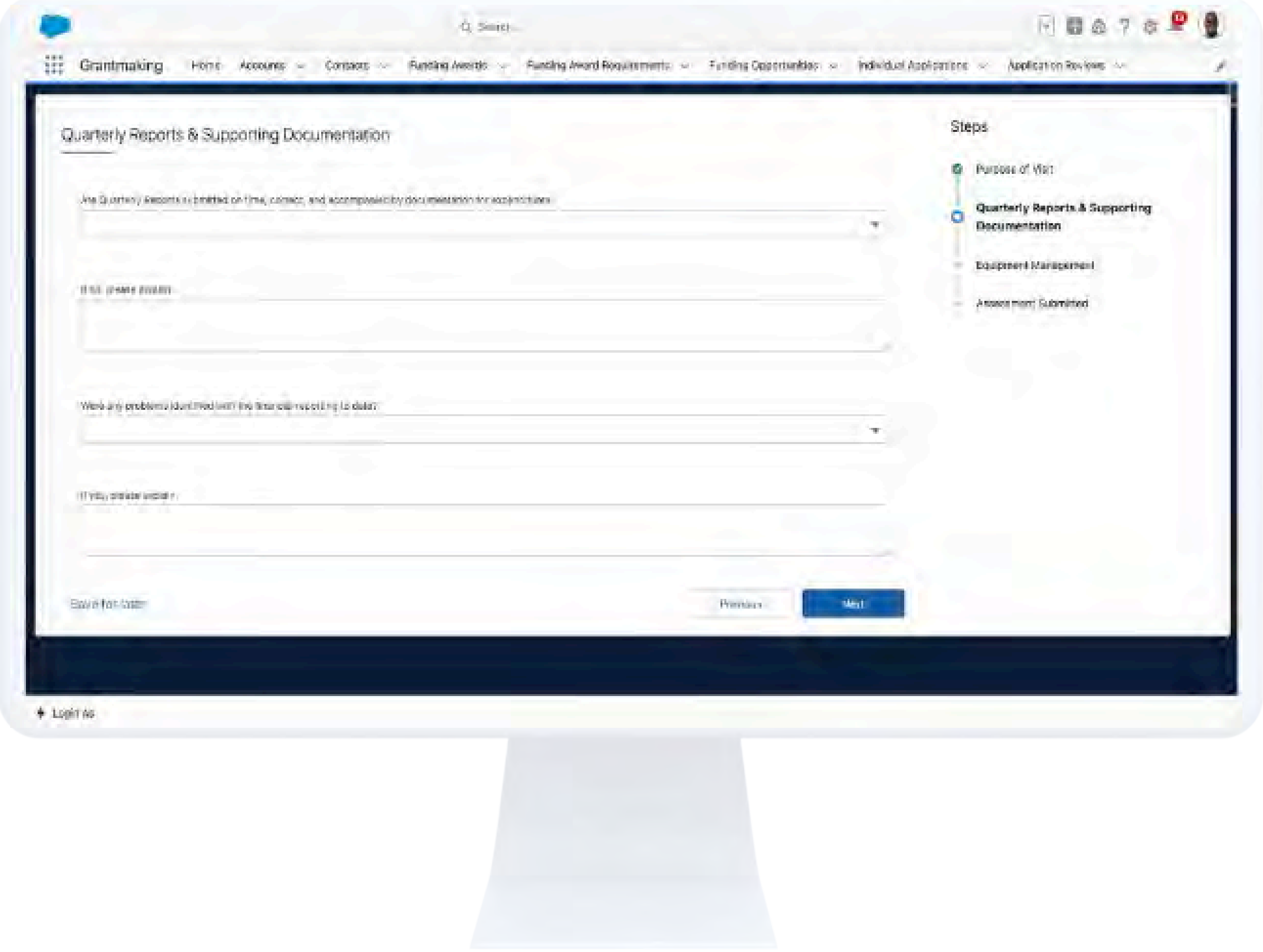
UI for Budget Actuals

- Grantees need to update budget details, submit actuals and provide explanations of variations
- Drag the "Budget" component onto Lightning record page
- Allow grantees to make post-award updates to budgets and submit actuals against plan
  - Allow grant makers to see updates in real time
- Structured entry and management of proposed and actual budgets



Dynamic Assessments

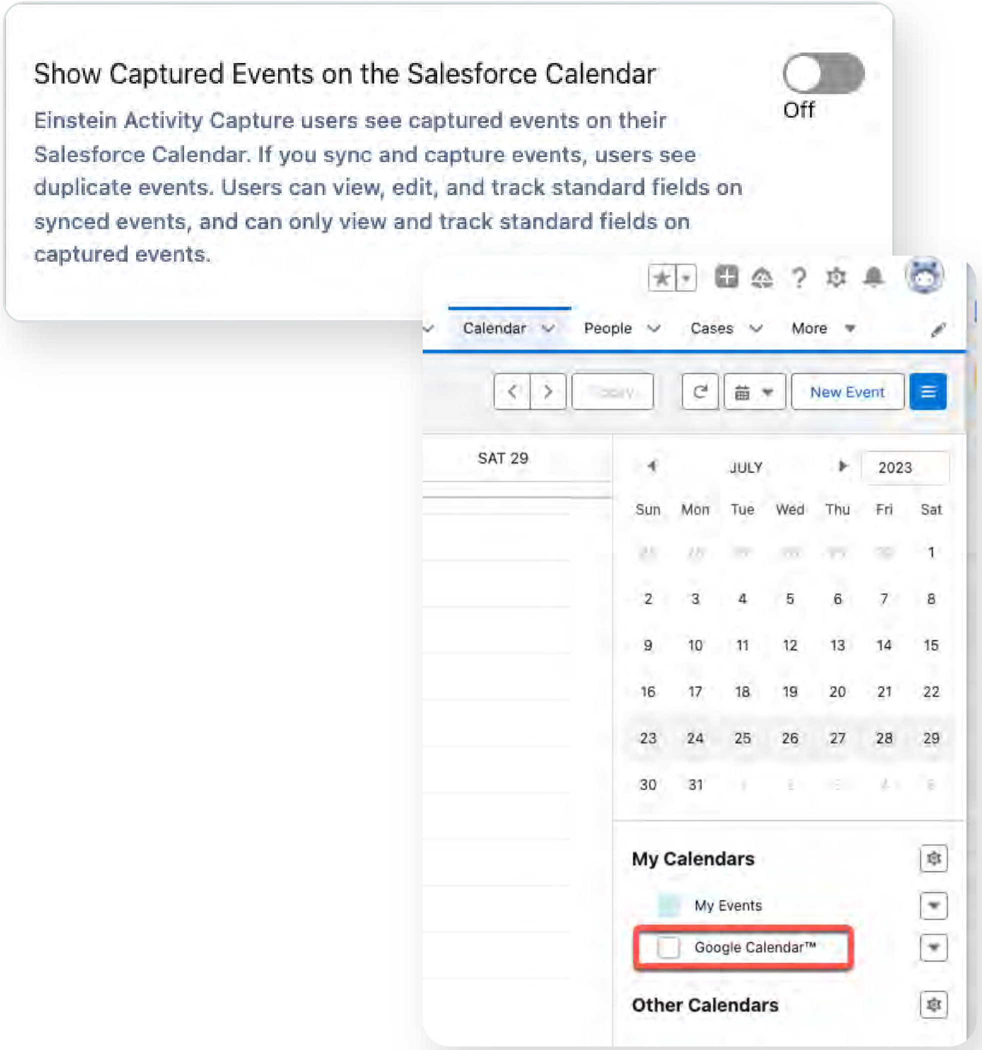
- Grantmakers need to design detailed assessment questions and tasks that include conditional logic and dependencies in support of grant compliance and monitoring processes
- Enable Dynamic Assessment Access and Industry Assessment
- Support post-award grant compliance and monitoring activities including site inspections and/or audits related to funding awards
  - Add Dynamic Assessments to Funding Award & Funding Award Requirement objects
- Support of grant specific assessment needs



More Salesforce User Focused

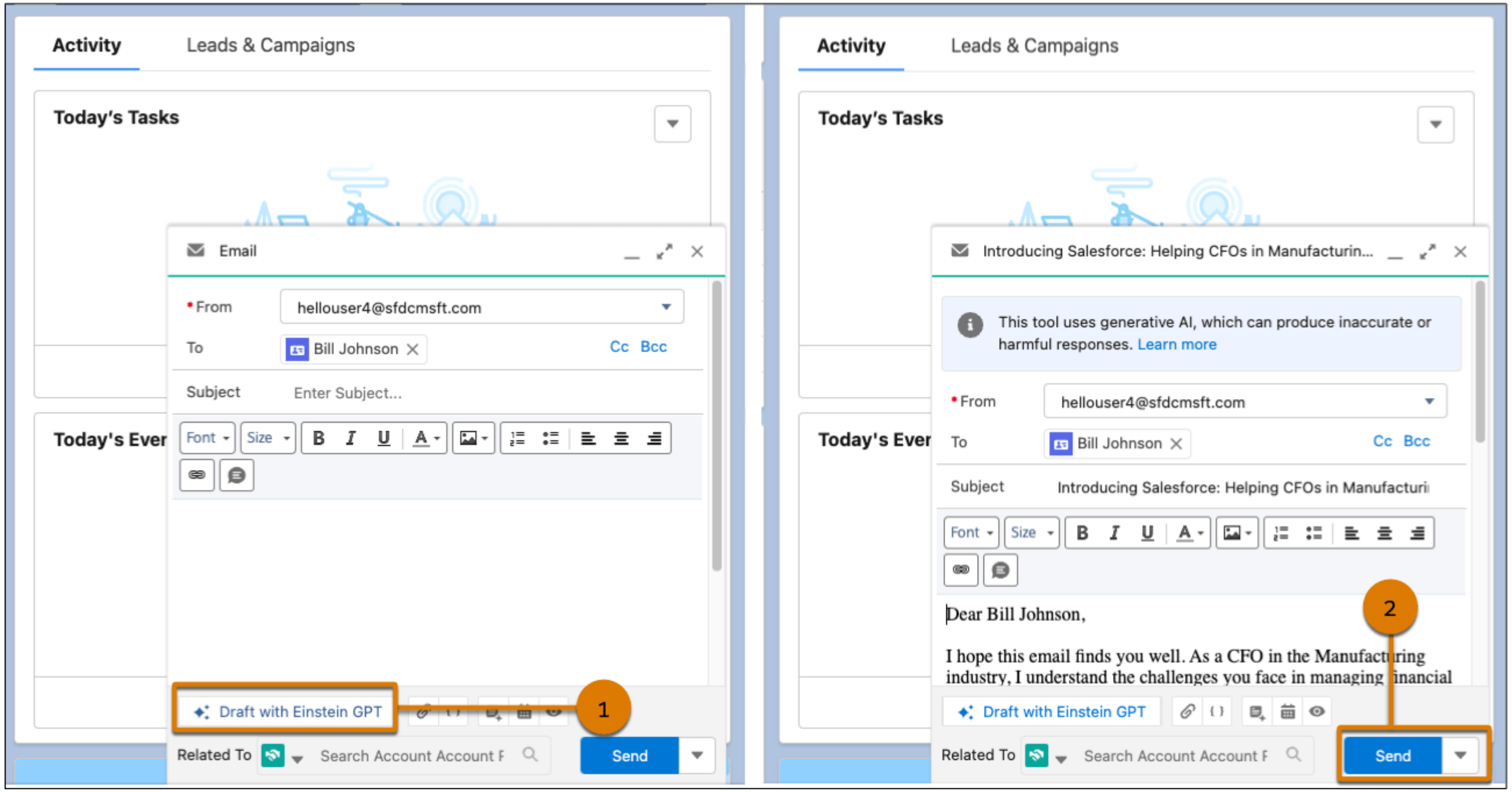
Display Only Salesforce Events on Calendar

- Avoid displaying duplicate or redundant event data when multiple event sources are in play
- Prevent the "Google Calendar" or "Microsoft Office 365" overlay option from appearing in calendar view
- If desired to have the overlay option appear, it is not selected by default and needs to be enabled manually



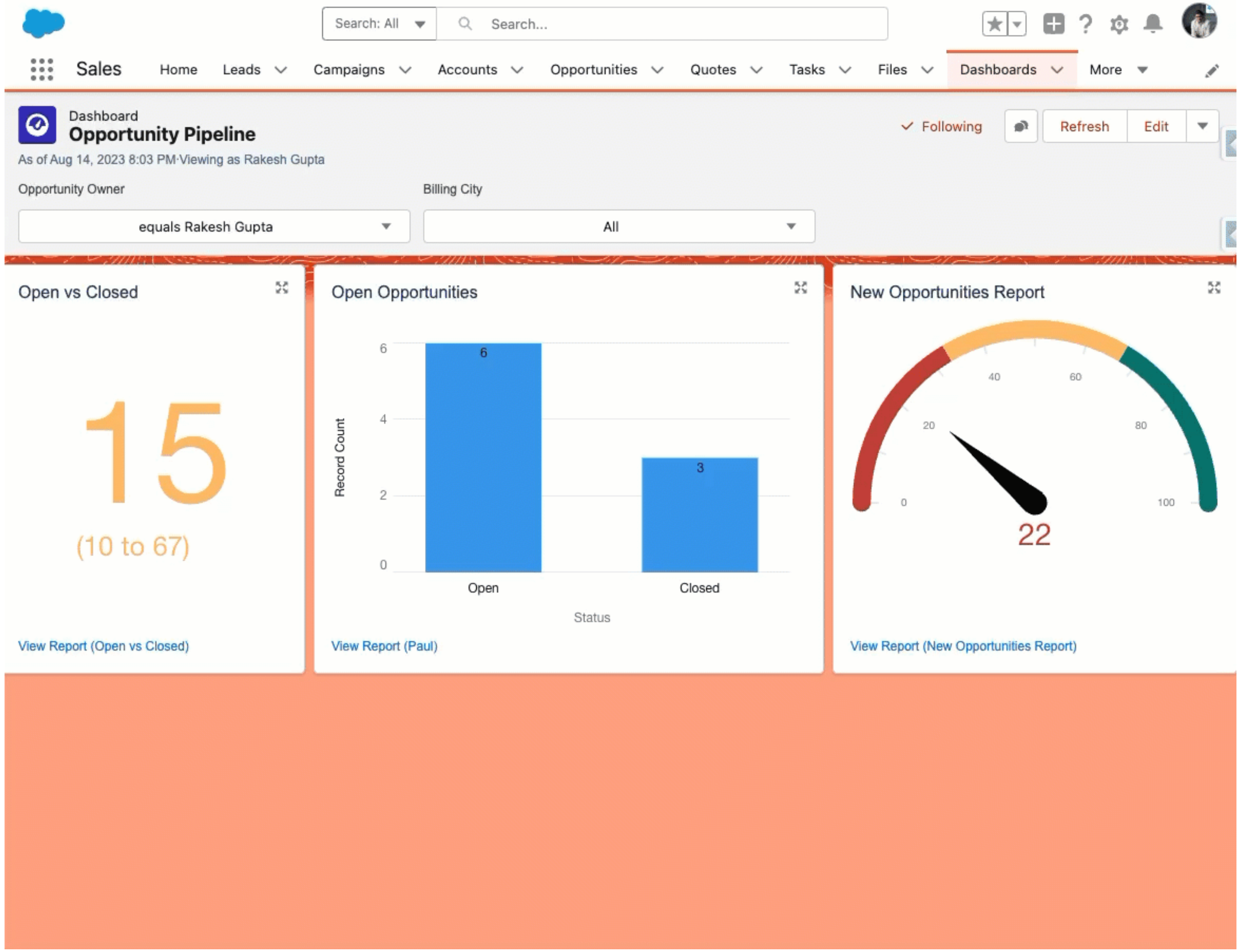
Personalize Sales Emails with Einstein GPT for Sales

- Einstein GPT uses your sales data to generate personalized emails
- Sales reps can draft emails, like a follow-up or a meeting invite, by choosing from the preset email prompt types
- This feature is available in Lightning Experience in Performance and Unlimited editions



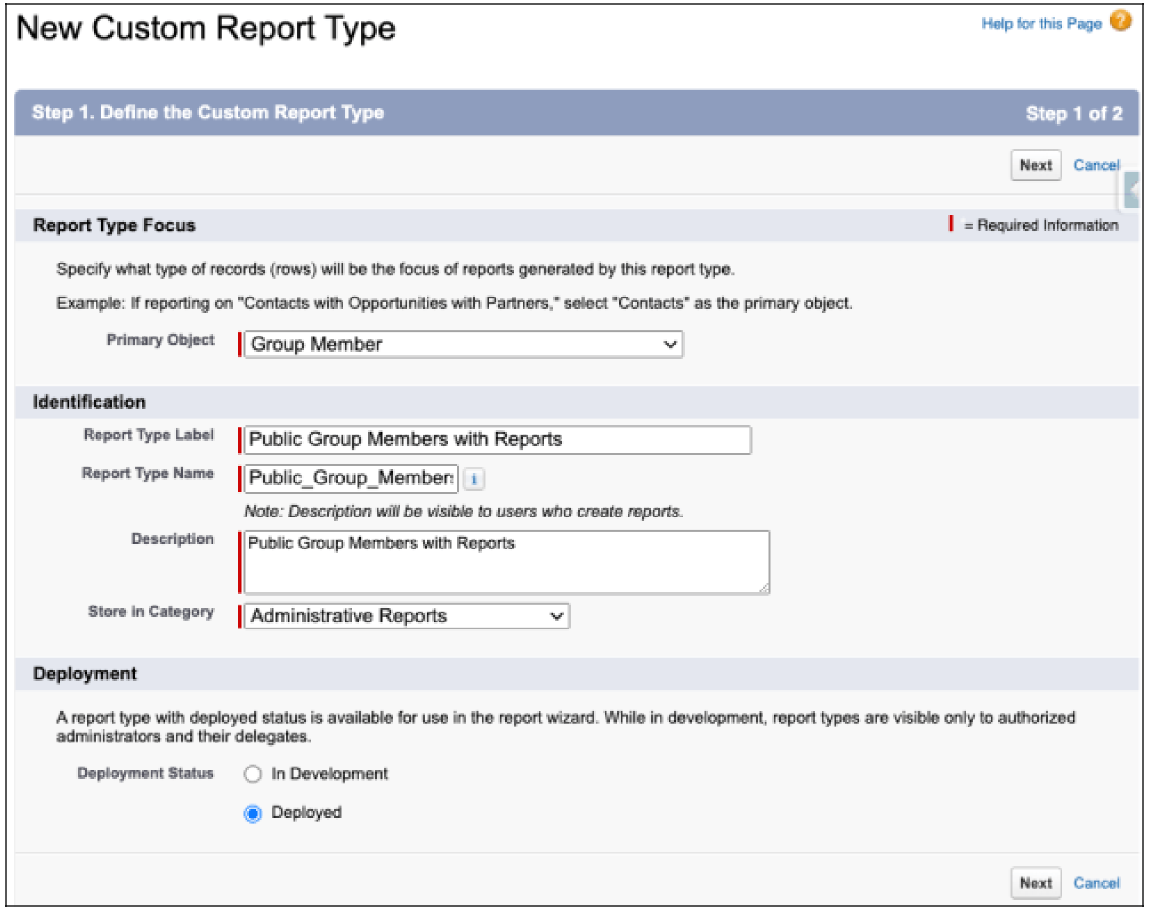
Transfer Dashboard Ownership

- You can now transfer ownership of your Lightning dashboard to the user who’s best suited to manage the dashboard access and content
- The new owner gets the same access as the original dashboard creator



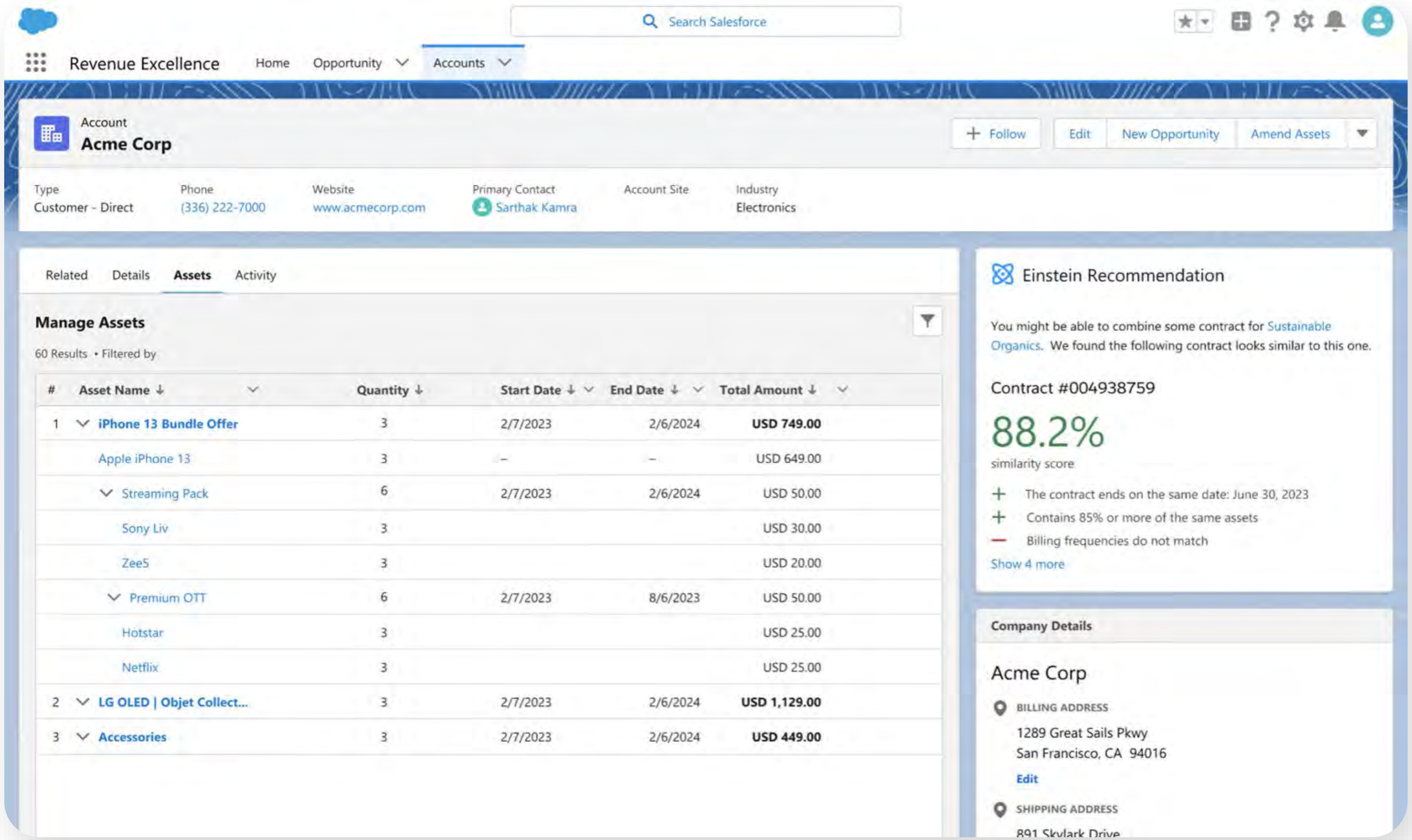
Report on Members of a Public Group and Queue

- Using a custom report type, it is now possible to see who the members are in a Group or Queue via Reports
- Previously would have to run SQL Queries to review the data
- Managers will easily be able to move reps in and out of queues and groups



Asset Hierarchy

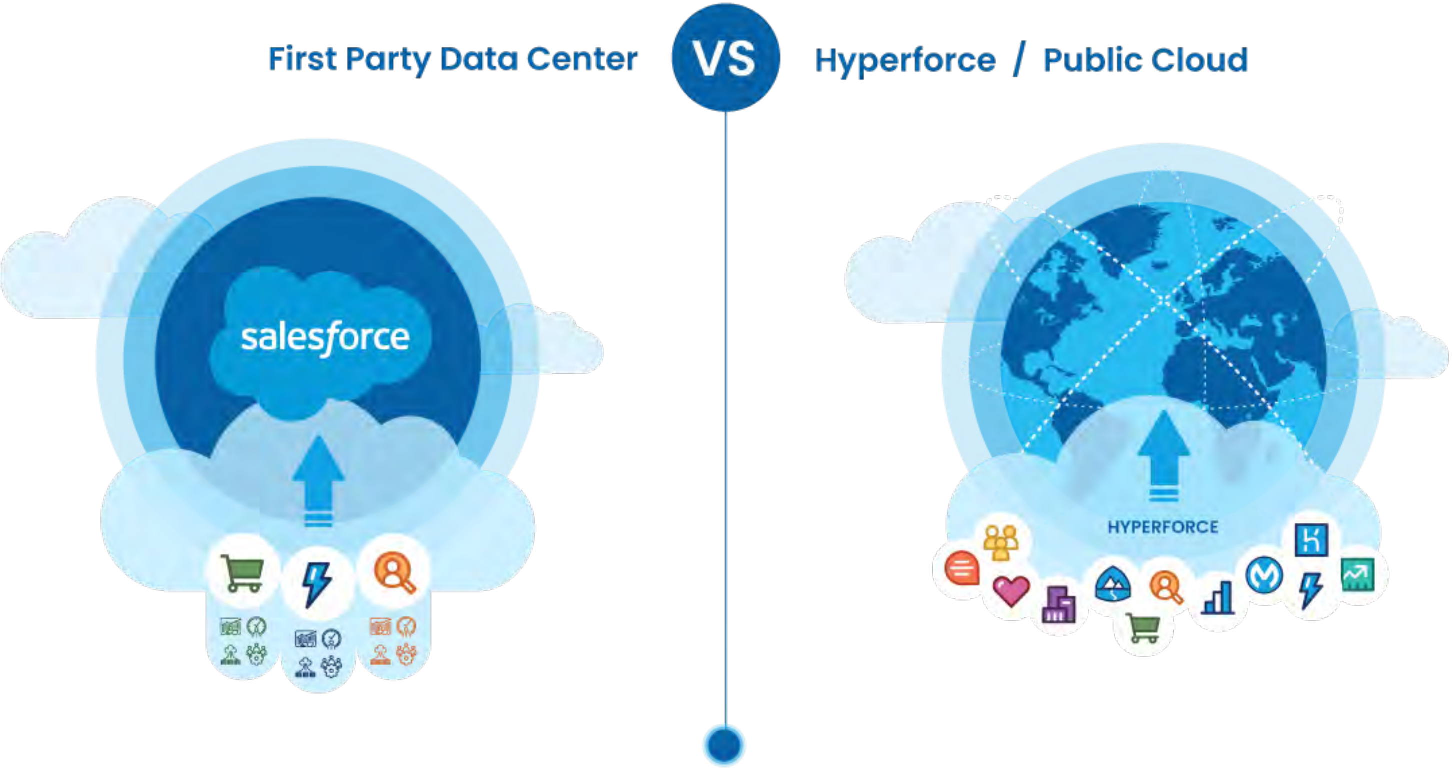
- New asset will display all assets for the specific account being viewed
- Ability to quickly browse account specific assets in a single view without navigating to each asset to gather additional information
- Enabling a new component within the Lightning App Builder will show the hierarchy view



More Salesforce Administrator Focused

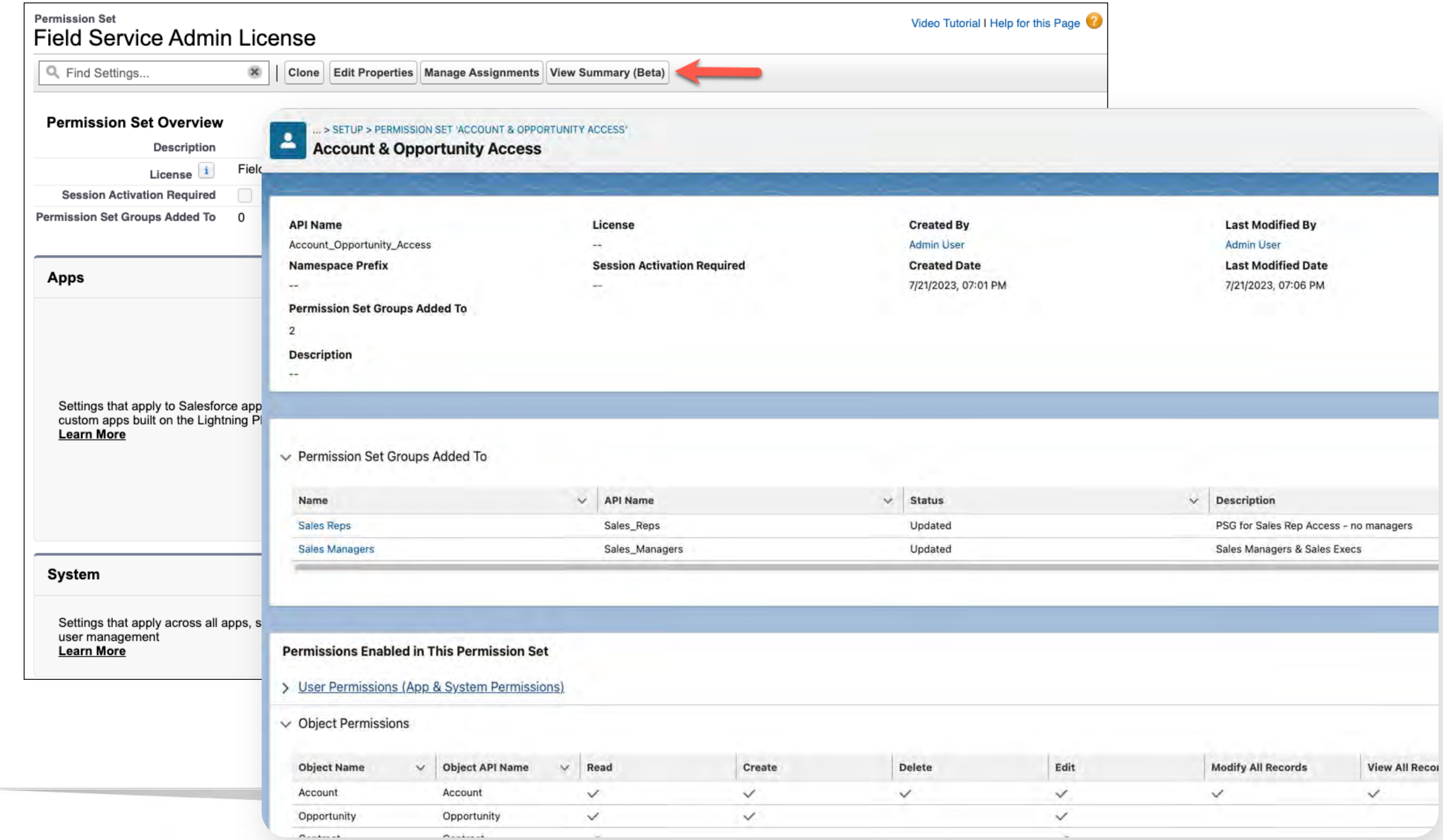
Migrate to Hyperforce with the Assistant

- Hyperforce Assistant is now available to help with the migration process
- Allows the platform to be deployed to your choice of cloud infrastructure providers, such as Amazon Web Services (AWS), Google Cloud Platform (GCP) and Microsoft Azure
- Protects customer data and ensures compliance with industry standards and regulations. Learn More.



Permission Set Summary View

- Summary View shows all the details like the API Name, Created & Modified Date and more
- Shows what Permission Set Groups it has been added to
- Overview of Permissions that have been enabled in the permission set



Report on Permission Set Assignment

- Reports now allow you to see which permission sets are assigned to users, all in one view
- This would be achievable with a Custom Report Type
  - Utilizing the Permission Set Assignment object
- Run a report by a user or by permission set or permission set group to see who is assigned to what in one place

Report: Permission Set Assignment Report Type

Perm Set Assignments

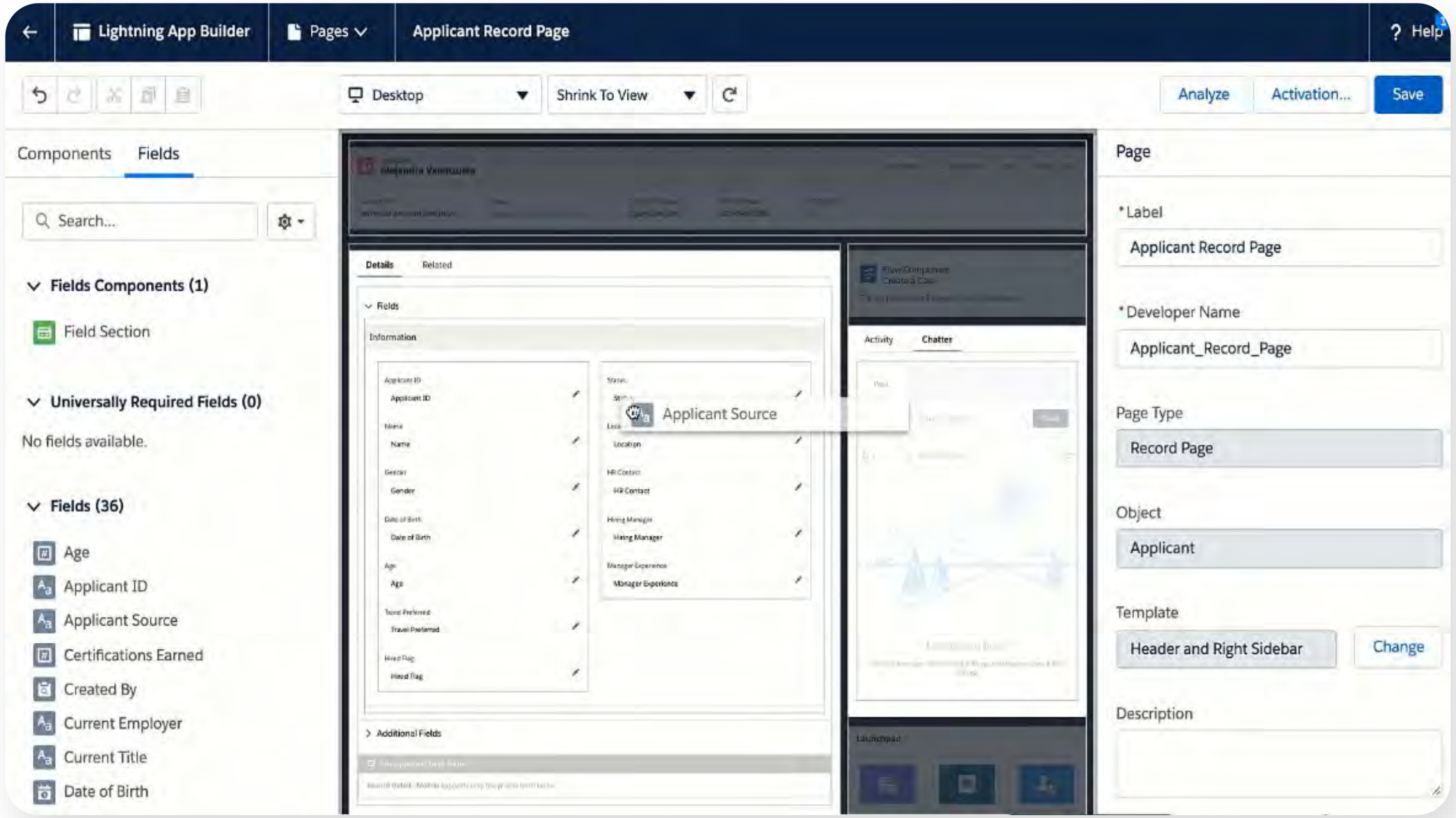
Total Records: 5

Total User: Active: 4

User: Full Name	Permission Set: Permission Set Name	Permission Set: Permission Set Type	User: Active
Admin User (1)	Account_Opportunity_Access	Regular	☑
Subtotal			1
Alyssa Admin (1)	Account_Opportunity_Access	Regular	☑
Subtotal			1
Jose Sales Manager (2)	Sales_Managers	Group	☑
	Account_Opportunity_Access	Regular	☑
Subtotal			1
Leslie Sales Rep (1)	Account_Opportunity_Access	Regular	☑
Subtotal			1
Total (5)			4

Dynamic Forms for Standard Objects

- Dynamic Forms help display data conditionally and dynamically
- Previously only available on custom objects
- Now available on standard objects, desktop and mobile
- Enhances experience for the users as the page layouts will not be cluttered with unnecessary fields



API Names in Permission Sets

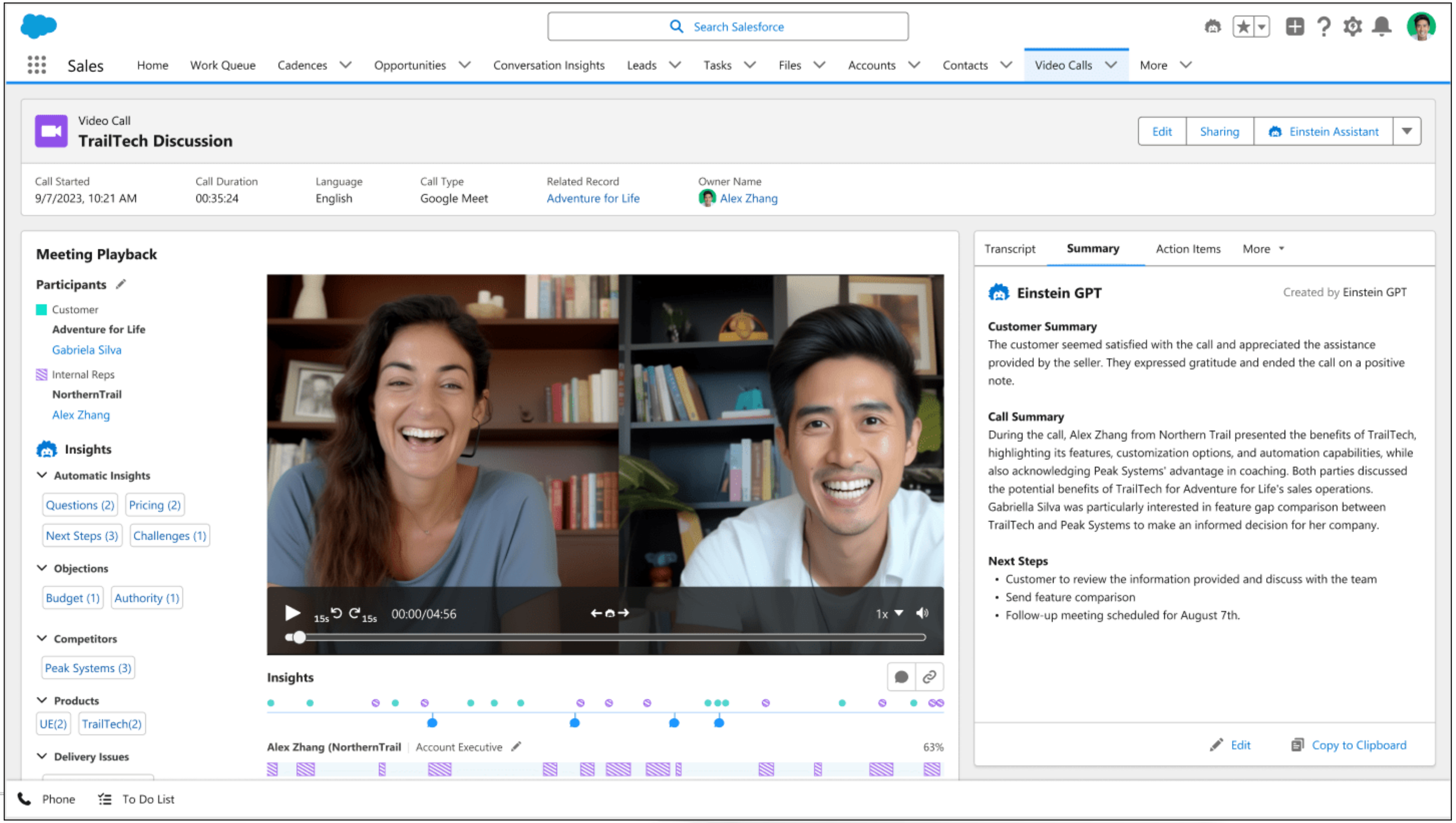
- You can now see API Names of Object and Field Permissions when configuring the Permission Sets
- This was an issue when admins were assigning objects in a permission set and two objects had the same label
- Admin experience with this update makes it easier to navigate and use permission sets

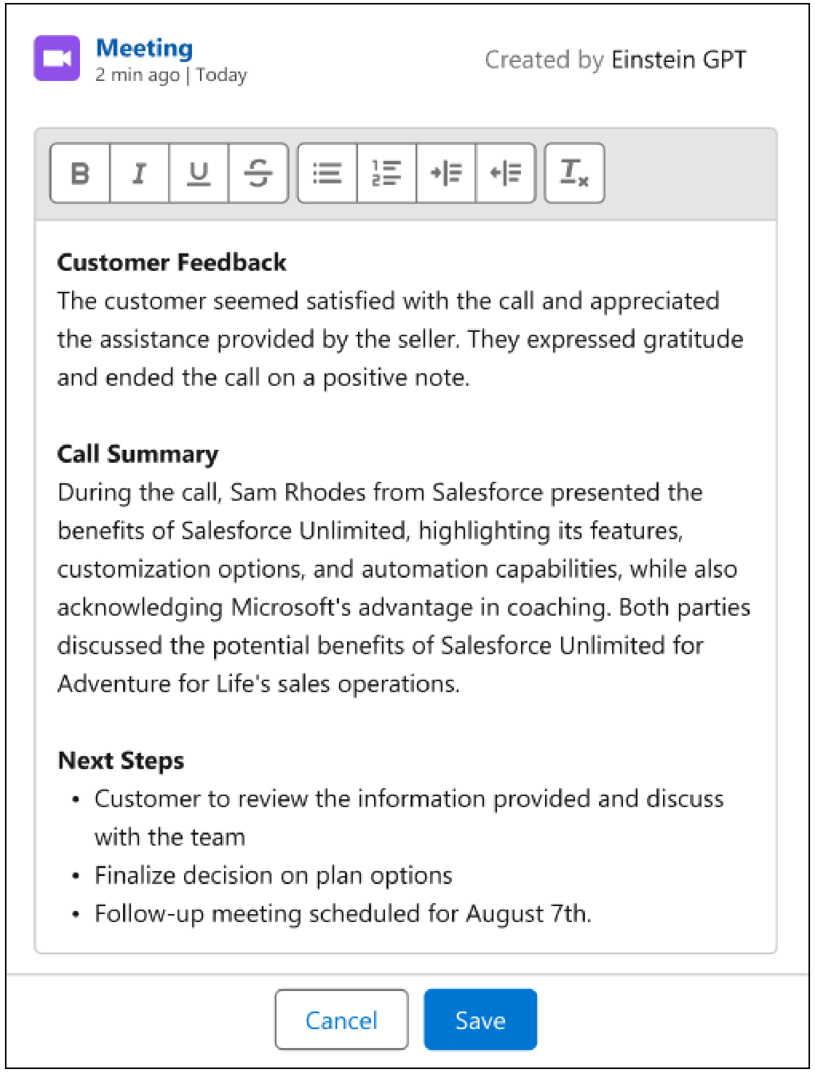
Object Settings

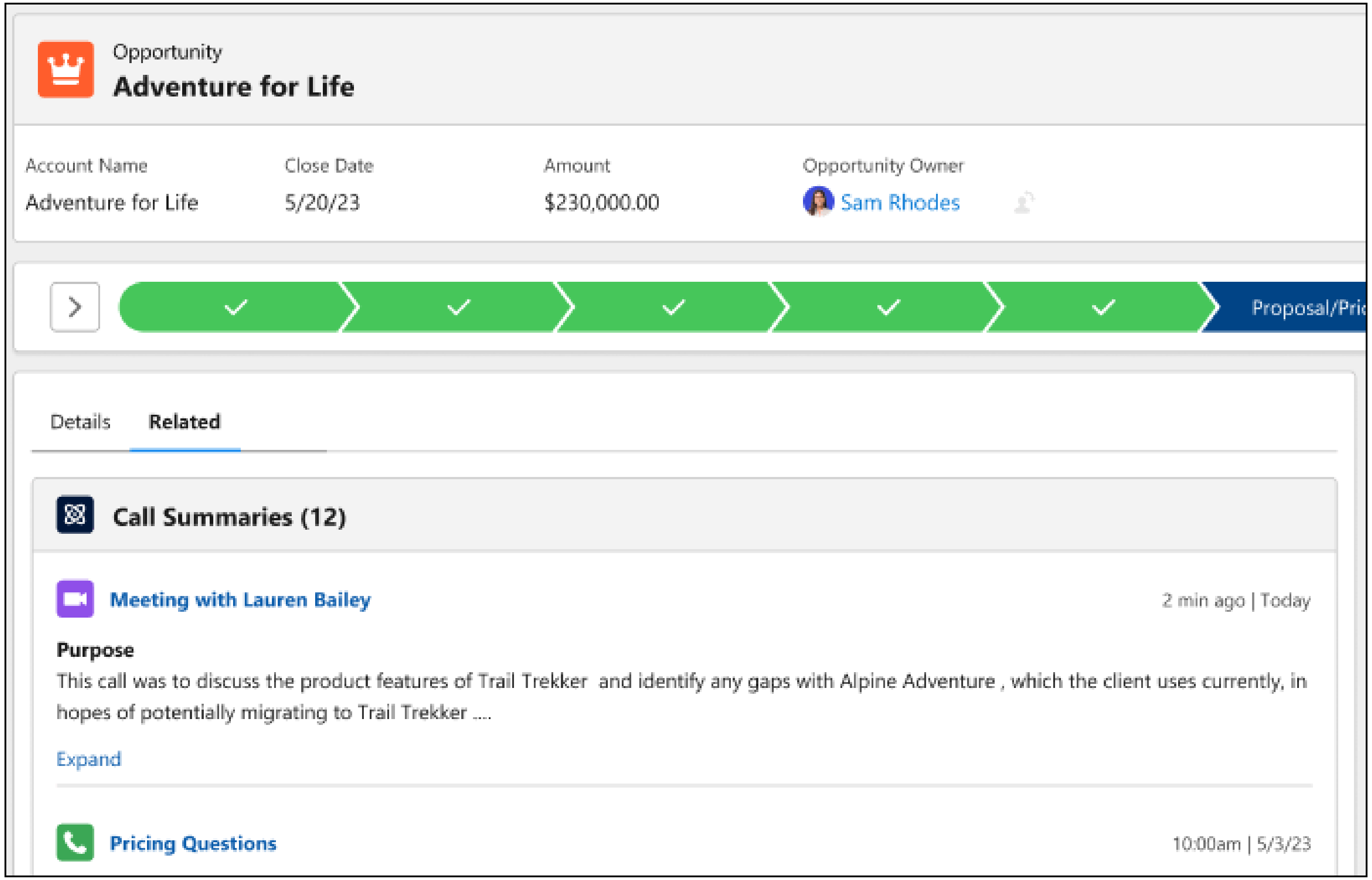
Object Name	Object API Name
Accounts	Account
App Analytics Query Requests	AppAnalyticsQueryRequest
Asset Relationships	AssetRelationship
Assets	Asset
Associated Locations	AssociatedLocation
Authorization Form Consents	AuthorizationFormConsent
Authorization Form Data Uses	AuthorizationFormDataUse
Authorization Forms	AuthorizationForm
Authorization Form Texts	AuthorizationFormText
Background Operations	BackgroundOperation
Badges	WorkBadgeDefinition
Badges Received	WorkBadge
Business Brands	BusinessBrand
Campaign Influence	CampaignInfluence
Campaign Members	CampaignMember
Campaigns	Campaign
Cases	Case
Communication Subscription Channel Types	CommSubscriptionChannelType
Communication Subscription Consents	CommSubscriptionConsent
Communication Subscriptions	CommSubscription
Communication Subscription Timings	CommSubscriptionTiming
Contact Point Addresses	ContactPointAddress
Contact Point Consents	ContactPointConsent

Create Call Summaries Powered by Einstein GPT

- Einstein can use it's generative AI talents to write post call summaries on voice and video calls
- Will display in the Summary tab and includes next steps and customer feedback

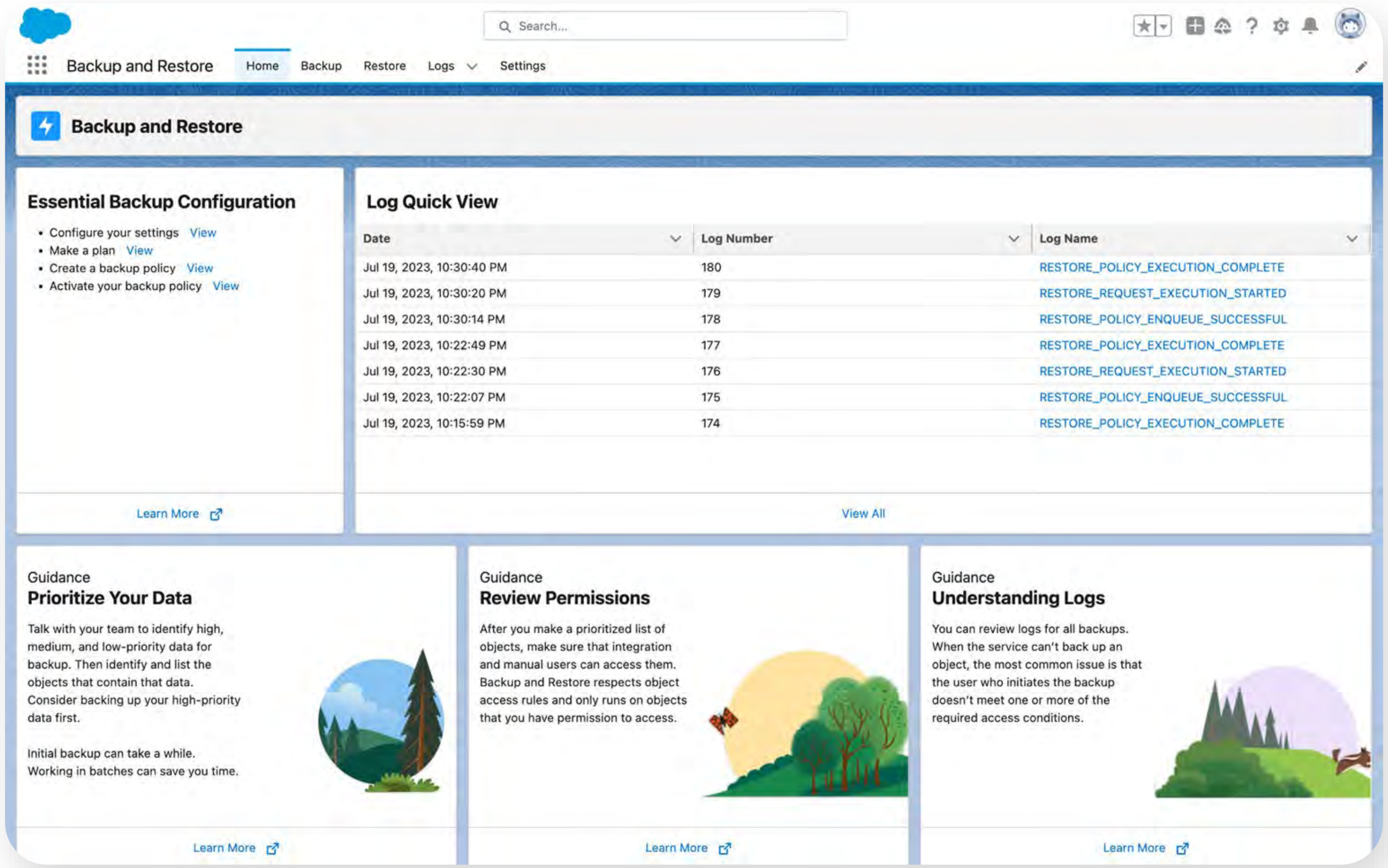



Meeting
2 min ago | Today
Created by Einstein GPT
Customer Feedback
The customer seemed satisfied with the call and appreciated the assistance provided by the seller. They expressed gratitude and ended the call on a positive note.
Call Summary
During the call, Sam Rhodes from Salesforce presented the benefits of Salesforce Unlimited, highlighting its features, customization options, and automation capabilities, while also acknowledging Microsoft's advantage in coaching. Both parties discussed the potential benefits of Salesforce Unlimited for Adventure for Life's sales operations.
Next Steps
• Customer to review the information provided and discuss with the team
• Finalize decision on plan options
• Follow-up meeting scheduled for August 7th.
Cancel
Save


Opportunity
Adventure for Life
Account Name
Adventure for Life
Close Date
5/20/23
Amount
$230,000.00
Opportunity Owner
Sam Rhodes
Proposal/Pri
Details
Related
Call Summaries (12)
Meeting with Lauren Bailey
2 min ago | Today
Purpose
This call was to discuss the product features of Trail Trekker and identify any gaps with Alpine Adventure , which the client uses currently, in hopes of potentially migrating to Trail Trekker ....
Expand
Pricing Questions
10:00am | 5/3/23

Salesforce Backup & Restore

- Protect CRM data against permanent data loss and corruption with daily backups and the ability to restore data from backup
- An integration or user error may cause data loss or corruption in your org, but Backup & Restore can restore lost or corrupted data from a prior backup



Armanino Led Salesforce Virtual Classes

Whether you have new employees that need to get up to speed quickly, or simply need to learn more about the features and functionality of Salesforce, check out our Armanino Academy!

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Additional Questions?

Reach out to us:

James.Moore@armanino.com

Peter.Kim@armanino.com