

July 6, 2023

Latest Updates in the Salesforce 2023 Summer Release Nonprofit



MEET

Our Presenters



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Industry Experience: 10 years



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Industry Experience: 10+ years



KNOWLEDGE

Learning Objectives



Learn about the recent
release features and
updates



Gain insight into the
enhancements that can
improve your pledge-to-
cash cycle



Understand how to
manage the latest
release to boost
productivity



Exploring New Areas

Agenda – Nonprofit Cloud Case Management (NCCM)

- Use dynamic assessments with accounts, contacts and cases
- Manage benefit schedules and sessions and track disbursed benefits with guided flows
- Preview your care plan template and use the care plan summary view
- Set up the referral intake guided flow quickly with prebuilt components
- Create and merge party relationship groups using UI flows with ease





Exploring New Areas

Agenda – Program Management Module (PMM)

- Use action plans to efficiently track tasks and documents for your programs and benefits
- Use the field-level security setting to restrict your users' access
- Track program and benefit activities chronologically
- Customize the benefit schedule workflow to address your business needs



Nonprofit Cloud Case Management (NCCM)





Dynamic Assessments

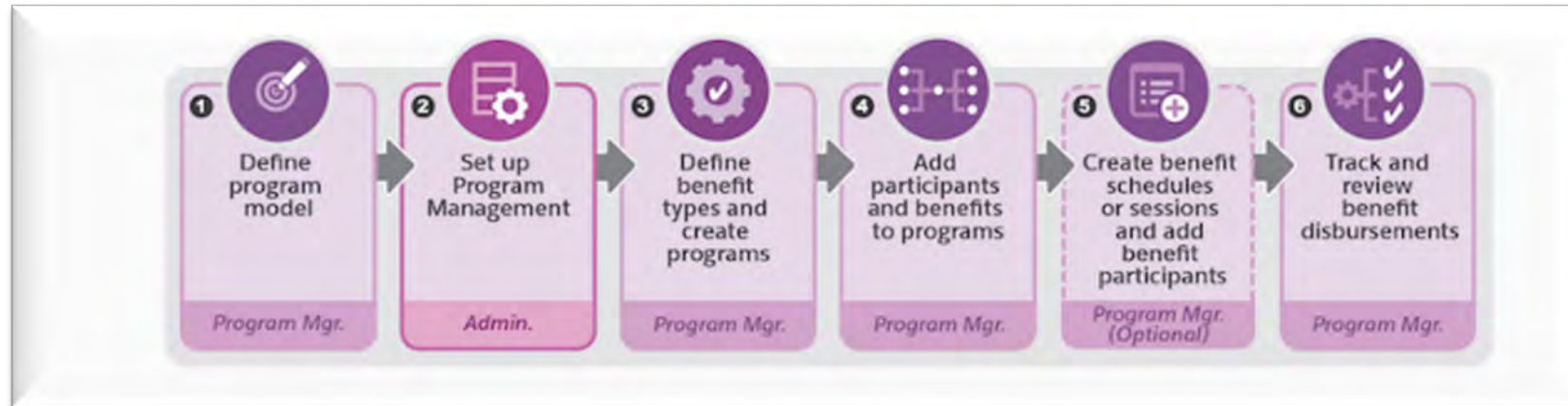
1. Enable discovery framework
2. Set up assessment question categories
3. Set up an Omni assessment task
4. Add questions to the omni assessment task
5. Build an OmniScript
6. Create an action plan template for dynamic assessment
7. Create an action plan for a dynamic assessment
8. Add dynamic assessments to care plans

Dynamic Assessments: A new, enhanced guided flow allows users to easily fill out assessments, while questions in the assessment form update dynamically based on answers to previous questions in the form. Users can then quickly upload appropriate files within the context of the assessment.

[Link to Salesforce Release Notes](#)



Benefit Schedules and Sessions



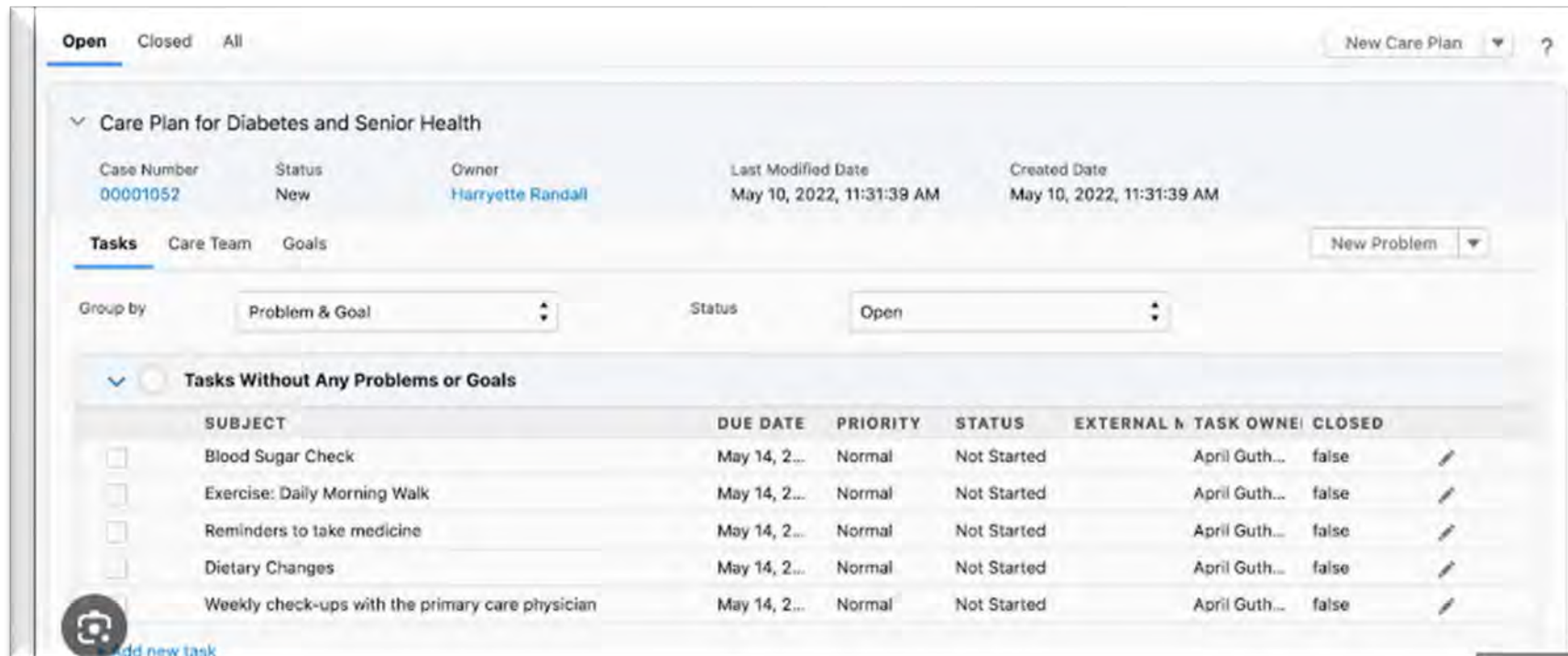
A **benefit session** is an instance or occurrence within a benefit schedule. A schedule can have one or more benefit sessions based on the benefit selected. You can add participants to all benefit sessions in a schedule or to selected sessions.

The benefit schedule page is based on **OmniScript**.

[Link to Salesforce Release Notes](#)



Care Plan Templates and Summary View



The screenshot displays a Salesforce interface for a care plan. At the top, there are tabs for 'Open', 'Closed', and 'All', along with a 'New Care Plan' button. The main section is titled 'Care Plan for Diabetes and Senior Health'. Below this, a summary card shows the Case Number (00001052), Status (New), Owner (Harryette Randall), Last Modified Date (May 10, 2022, 11:31:39 AM), and Created Date (May 10, 2022, 11:31:39 AM). Below the summary, there are tabs for 'Tasks', 'Care Team', and 'Goals', with a 'New Problem' button. The 'Tasks' tab is active, showing a 'Group by' dropdown set to 'Problem & Goal' and a 'Status' dropdown set to 'Open'. A section titled 'Tasks Without Any Problems or Goals' contains a table with the following data:

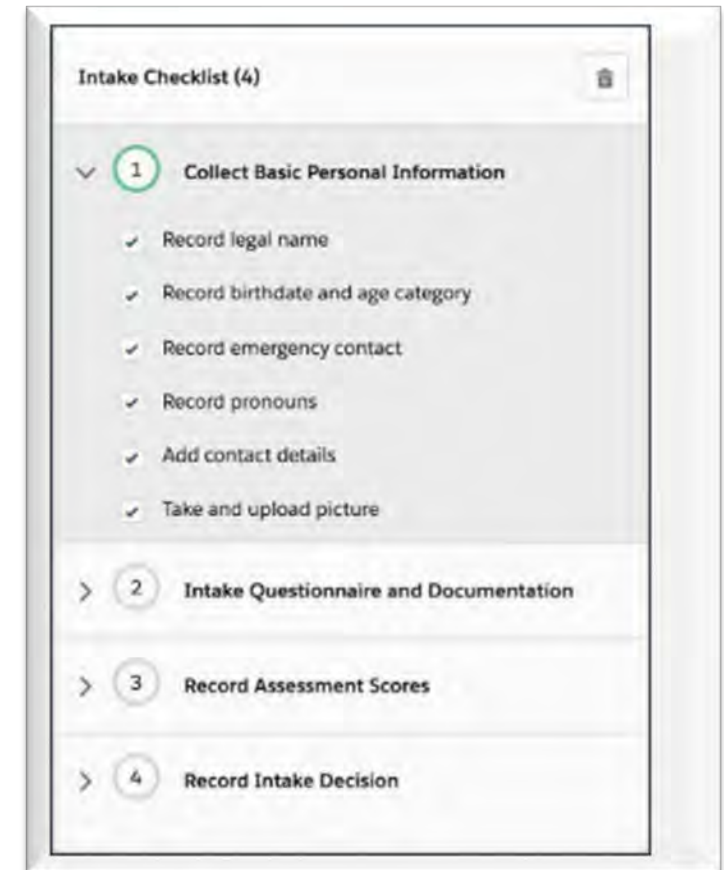
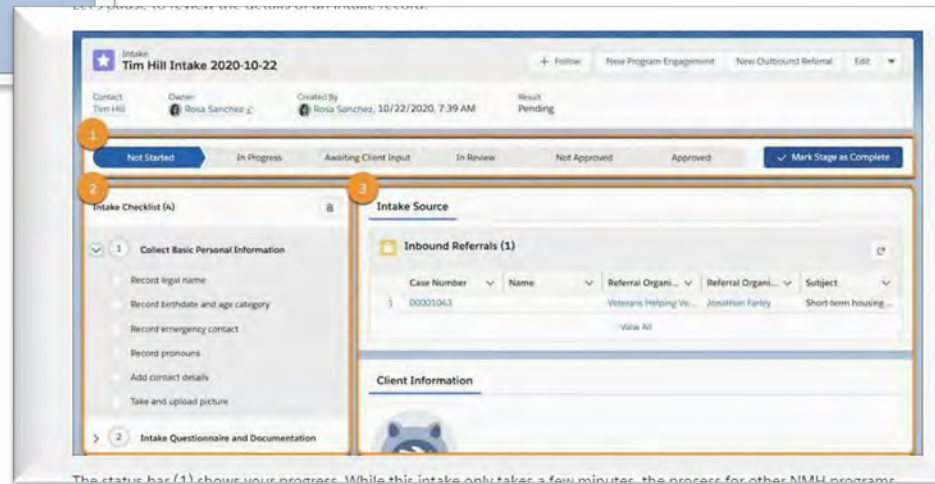
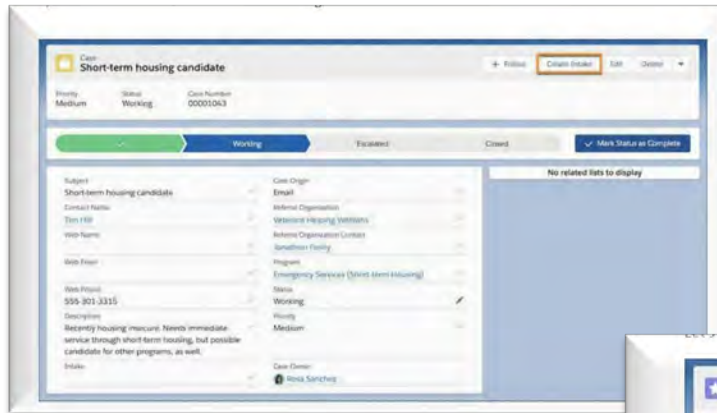
	SUBJECT	DUE DATE	PRIORITY	STATUS	EXTERNAL N	TASK OWNE	CLOSED
<input type="checkbox"/>	Blood Sugar Check	May 14, 2...	Normal	Not Started		April Guth...	false
<input type="checkbox"/>	Exercise: Daily Morning Walk	May 14, 2...	Normal	Not Started		April Guth...	false
<input type="checkbox"/>	Reminders to take medicine	May 14, 2...	Normal	Not Started		April Guth...	false
<input type="checkbox"/>	Dietary Changes	May 14, 2...	Normal	Not Started		April Guth...	false
<input type="checkbox"/>	Weekly check-ups with the primary care physician	May 14, 2...	Normal	Not Started		April Guth...	false

At the bottom left of the task list, there is a camera icon and a link to 'Add new task'.

[Link to Salesforce Release Notes](#)



Referral Intake Guided Flow (Prebuilt Components)



[Link to Salesforce Release Notes](#)



Party Relationship Groups

- Enable party relationship groups
- Turn on contacts to multiple accounts
- Add the related contacts related list to the account page layout
- Create values for party relationship group fields (picklist values for category and sub-category)
- Create a party relationship group
- Add members to a party relationship group
- Capture relationships between constituents and groups
- Create party relationship using guided workflow
- Merge party relationship groups
- View party relationship group merge logs

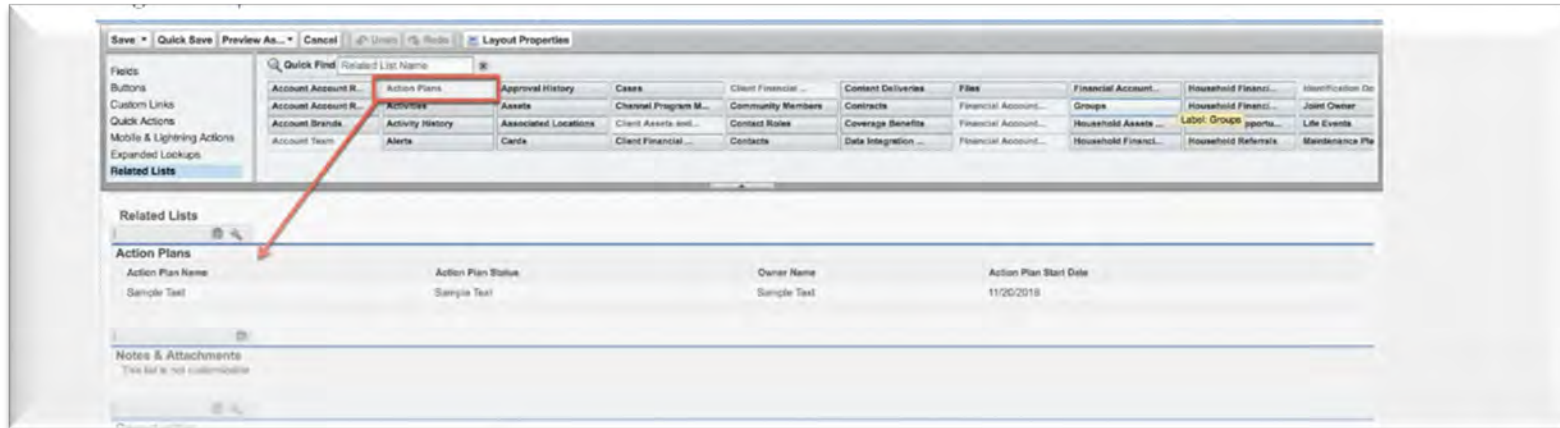
[Link to Salesforce Release Notes](#)



Program Management Module (PMM)



Action Plans



- Automation
- Standardization
- Tracking and Monitoring
- Customization
- Reporting and Analysis

[Link to Salesforce Release Notes](#)



Field Level Security

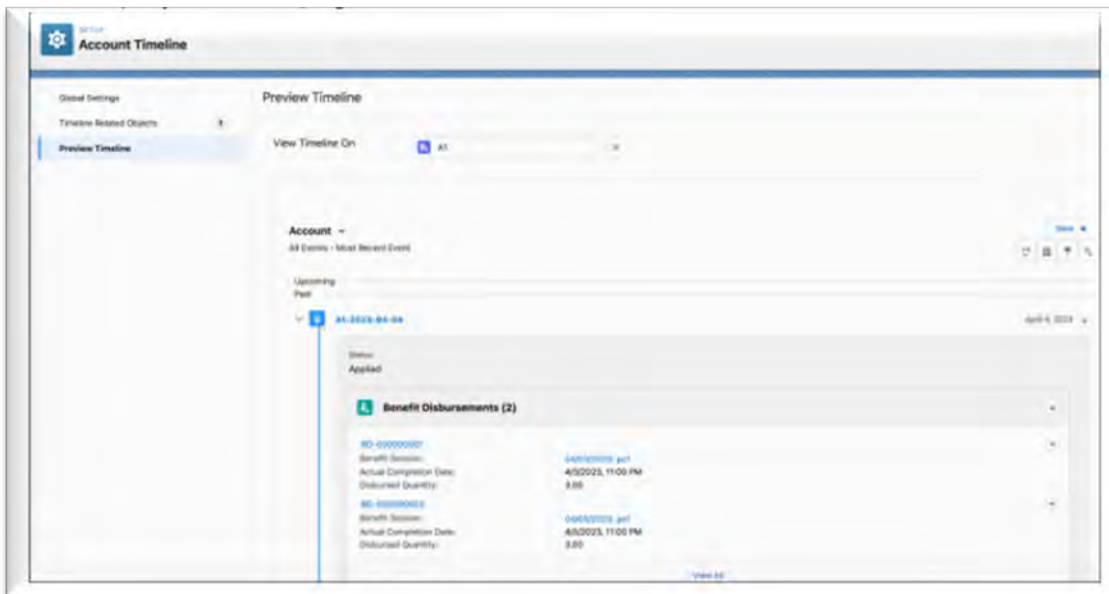
Field Name	Read Access	Edit Access
Approval Status	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department	<input type="checkbox"/>	<input type="checkbox"/>
Education	<input type="checkbox"/>	<input type="checkbox"/>
Hiring Manager	<input type="checkbox"/>	<input type="checkbox"/>
Job Description	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Legacy Position Number	<input type="checkbox"/>	<input type="checkbox"/>
Location	<input type="checkbox"/>	<input type="checkbox"/>
Operating Systems	<input type="checkbox"/>	<input type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pay Grade	<input type="checkbox"/>	<input type="checkbox"/>
Programming Languages	<input type="checkbox"/>	<input type="checkbox"/>
Record Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Related Position	<input type="checkbox"/>	<input type="checkbox"/>

- Set at **Profile**
- Set at **Permission Set**
- Can be done on all Profiles when set via **Object Manager**

[Link to Salesforce Release Notes](#)



Benefit Activity Tracking (Timeline Component)



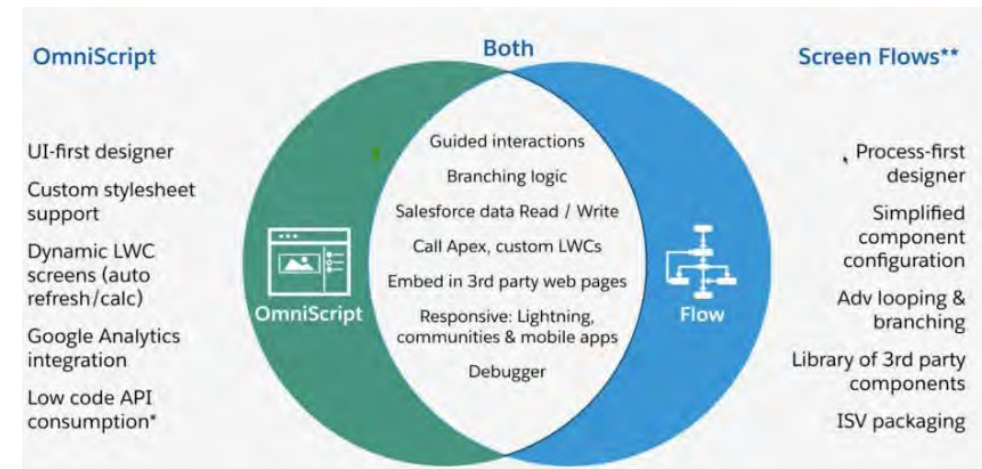
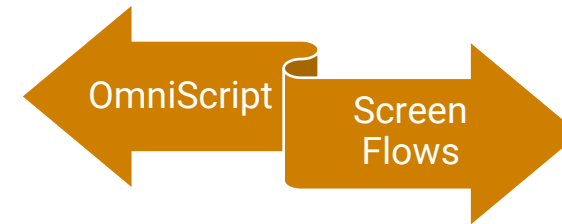
- Comprehensive View
- Improved Constituent Management
- Efficient Follow-up
- Collaboration and Visibility
- Historical Analysis
- Customization

[Link to Salesforce Release Notes](#)



Benefit Schedule Workflow using OmniScript

- **Actions** – Updating data, sending an email
- **Display** – Adding text images
- **Functions** – Formulas or warnings
- **Groups** – Blocks for grouping items for a one-page view or type ahead blocks for autocomplete and search
- **Inputs** – Data input or selection



[Link to Salesforce Release Notes](#)

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!](#)







Additional Questions?

Reach out to us at
Experts@armanino.com