

March 2, 2023

Latest Updates in the Salesforce Spring '23 Release

Nonprofit





QUICK TIPS

Zoom Webinars

Ask Questions in Q&A Box

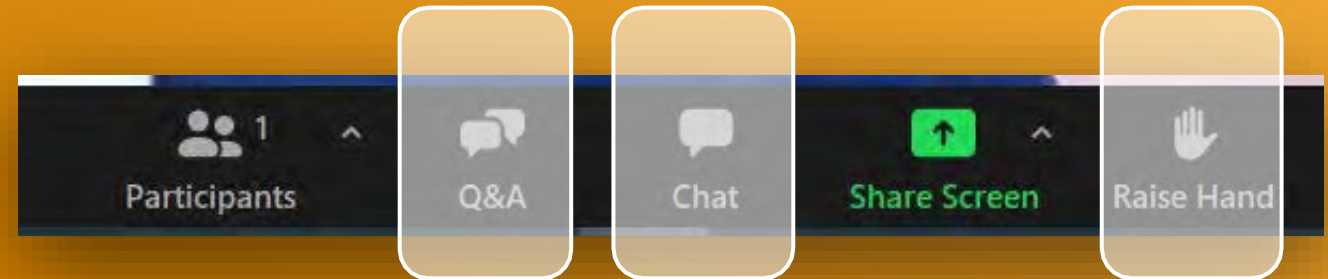
- Click the Q&A button to open the window
- Type your response in the text field
- Click Send

Chat

- Click the Chat button to open the chat panel
- Type your message in the Text box at the bottom of the panel
- Press Enter to send your message

Raise Your Hand

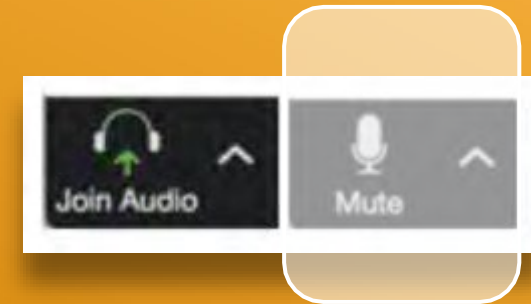
- Click the Raise Hand button at any time to indicate to the host know that you have a question or need assistance
- To lower your hand, click the Lower Hand button





QUICK TIPS

Adjust Audio Speakers

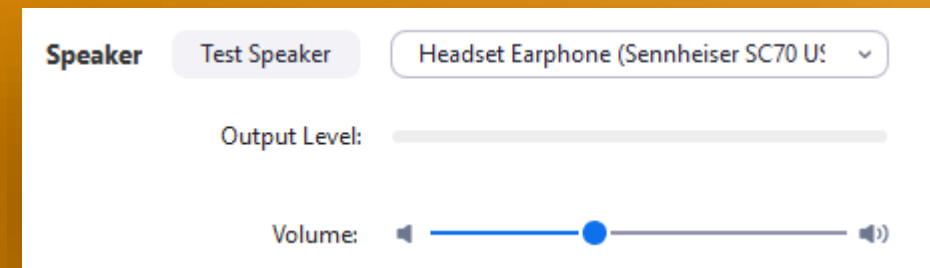


Mute | Unmute

- In the meeting controls, click the arrow next to Mute | Unmute in lower left corner

Audio Options

- Click Audio Options - this will open your audio settings
- Click Test Speaker to play a test tone
- If you cannot hear it, select a different speaker from the menu
- Try adjusting the Volume



WELCOME

Today's Presenters



Turner Jones

Senior Manager,
Armanino Advisory LLC
Industry Experience: 10 years



Jeleta Robinson

Senior Consultant,
Armanino Advisory LLC
Industry Experience: 10+ years





KNOWLEDGE

Learning Objectives



Gain insight into the new release features and updates



Learn more about the enhancements that can improve your pledge-to-cash cycle



Understand how to manage the latest release to promote productivity





Exploring New Areas

Agenda

- Nonprofit Cloud
 - Grants Management for Grantmaking
 - Program Management Module
 - Elevate
- Key Salesforce.com Enhancements
 - Reports and Dashboards
 - Activities
 - Topics for Salesforce Admins





#1

Polling Question





Top Nonprofit Trends Shaping the Next Decade



Efficiency

Managing Costs
Automation
Economic
Headwinds



Data

Digital = Data
Analytics
Smarter Decisions



Impact

More Revenue
More Programs
More Stakeholders

Source: Salesforce.org





Nonprofit Cloud

Grants
Management
for Grant Making

Program
Management

Elevate



PARTNER



Grants Management

- **Track Budgets**
 - **New Category and Period Entities:**
Budget Category, Budget Category Value and Budget Period

New Budget

Information

<p>▪ Budget Name <input style="width: 90%;" type="text"/></p> <p>Amount <input type="text"/></p> <p>Period Name <input type="text"/></p> <p>Period Start Date <input type="text"/></p> <p>Type --None--</p>	<p>Owner Name Aileen Davis</p> <p>Quantity <input type="text"/></p> <p>Description <input type="text"/></p> <p>Period End Date <input type="text"/></p> <p>Status --None--</p>
--	--

Cancel Save & New Save

  *Community Idea Delivered!*





Grant Application Review

- Segment feedback based on reviewer role!

Review Workspace
Details
Related

+ New Section
Cancel
Save Workspace

▼ Funding Request

Remove Section Edit Section

▼ STEPS to Leadership Show record

<p>Funding Request Name</p> <p>STEPS to Leadership</p>	<p>Requested For</p> <p>STEPS to Leadership is a proposed program that came from requests for additional leadership training for our graduates from Skills for Success, a successful program we currently offer to at-risk women in the community. After completing Skills for Success, graduates can learn leadership skills through various trainings, seminars, and one-on-one mentoring that will help prepare these future female leaders.</p>
<p>Requested Amount</p> <p>\$28,000.00</p>	

▼ Requirements

Remove Section Edit Section

Review

* Review Field Set

Proposal Feedback

—None—

Financials Feedback

✓ Proposal Feedback

Assigned To

Michon Livitt

Due Date

4/18/2024

Status

Not Started

Proposal Score

Proposal Comments





Program Management Module

- **Attendance Component** on the Salesforce Mobile App is enabled 💡💡



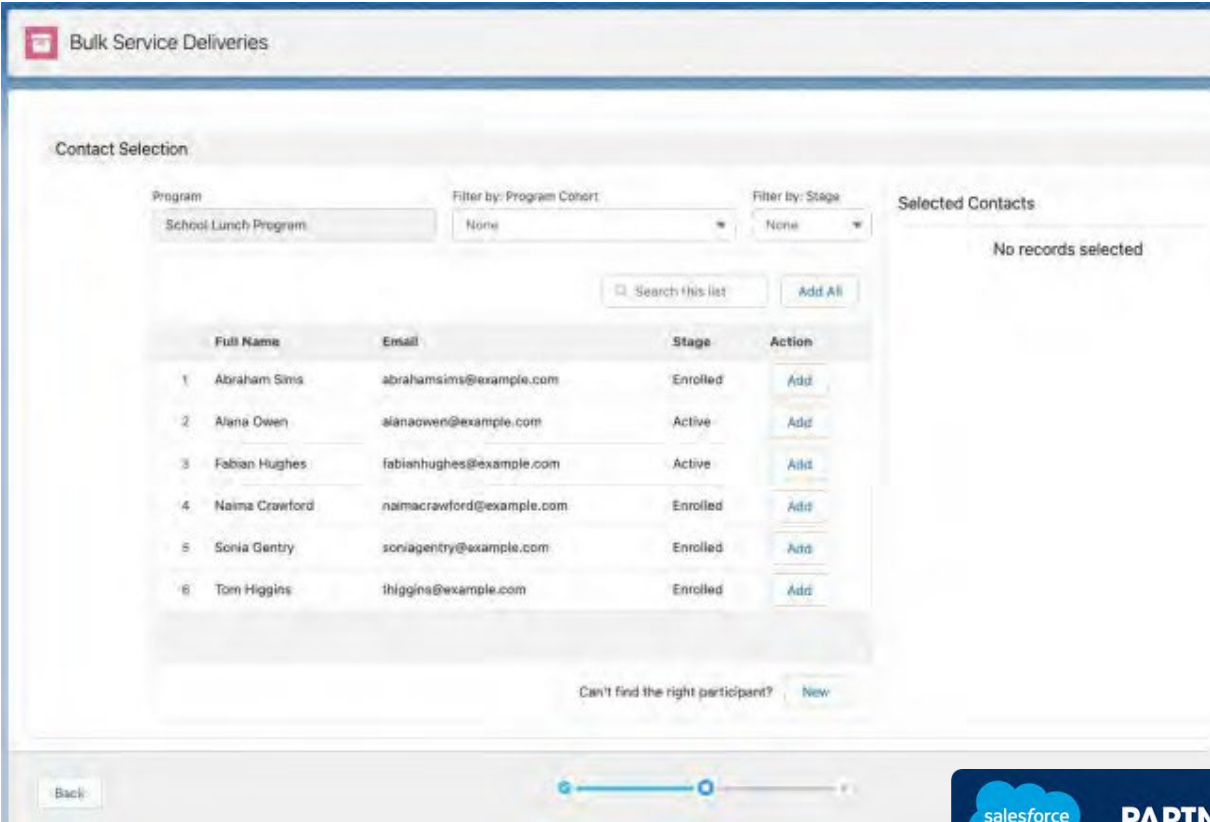
💡💡 *Community Idea Delivered!*





Program Management Module

- **Bulk Service Delivery Tool Improvements**
 - View a selected list of PEs in a specific stage



Bulk Service Deliveries

Contact Selection

Program: School Lunch Program | Filter by: Program Cohort: None | Filter by: Stage: None

Search this list | Add All

	Full Name	Email	Stage	Action
1	Abraham Sims	abrahamsims@example.com	Enrolled	Add
2	Alana Owen	alanaowen@example.com	Active	Add
3	Fabian Hughes	fabianhughes@example.com	Active	Add
4	Naima Crawford	naimacrawford@example.com	Enrolled	Add
5	Sonia Gentry	soniagentry@example.com	Enrolled	Add
6	Tom Higgins	thiggins@example.com	Enrolled	Add

Selected Contacts: No records selected

Can't find the right participant? [New](#)

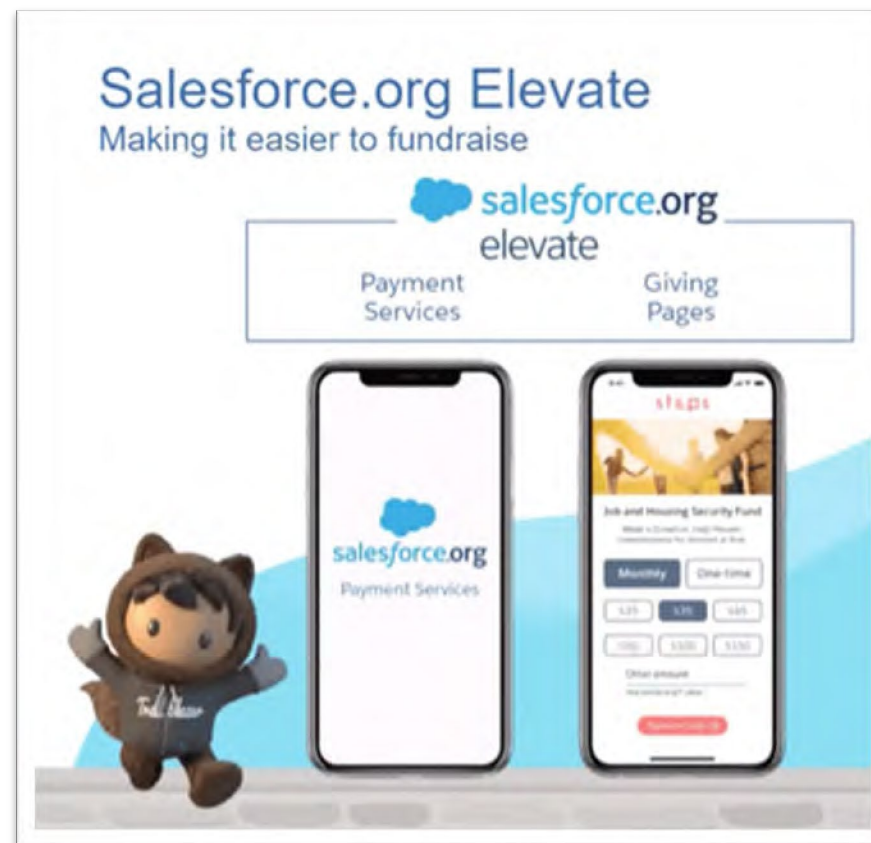
Back





Elevate Upgrades!

- **Automatic Credit Card updates** for recurring donations
- **Reprocessing Failed Payments**
- **Paya Sage** now available as a payment gateway
- **Batch Gift Entry** now supports recurring donations





Elevate Gift Entry and Gateway Assignment

New Template
Cancel Save & Close

Form Fields & Field Bundles

Choose fields to include in your form. Before adding fields, click the section in the main screen where you want the fields to go. In the sidebar, select the checkbox to add a field, and deselect it to remove the field from the form. If the object or field you want to use isn't listed, make sure you've set up the field with Advanced Mapping. [Read More](#)

[Collapse All](#)

Field Bundles

Donor Type

GAU Allocations

Elevate Payment Processing

[Collapse All](#)

Form Fields

These fields are commonly included in gift entry forms. Custom Object Groups are also found in this section.

[Account 1](#) ⊕

[Contact 1](#) ⊕

[Opportunity](#) ⊕

Configure Form Fields

Click a section, then select a field in the side bar to add it to the section in the main screen. For each field, you can edit the field label, mark it as required, assign a default value or remove it from the section. The gift entry form layout can be managed by creating sections and reordering the sections or fields.

Section Title ⚙️ ⏪ ⏩

Field Label	Default Value	Required
Object name: Field name Placeholder label	Select an Option	<input checked="" type="checkbox"/>


Elevate Payment Processing field bundle

This field bundle includes the following fields:

- Card Number
- Expiry Date
- Security Code

Select Elevate Payment Gateway and Method

- Select Payment Gateway
 - Stripe
- Select Payment Methods
 - ACH (Bank Account)
 - Credit Card



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Gateway and Payment Method

- Pause an elevate-connected recurring donation within NPSP!

Recurring Donation: ***Penny Volunteer Monthly Recurring Donation - \$10**

Amount: \$10.00 | Installation Period: Monthly | Installation Frequency: 3 | Last Donation Date: | Status: Failing

Close Recurring Donation | Edit | Delete

Related List Quick Links

- Opportunities (9)
- GAU Allocations (1)
- Files & Attachments (2)
- Recurring Donation History (1)

Details | Attachments | History

Details

Information

Recurring Donation Name	Amount
*Penny Volunteer Monthly Recurring Donation - \$10	\$10.00
Date Established	Recurring Type
10/27/2020	Open
Status	Status Reason
Active	

Schedule Details

Active Schedules

Current Schedule

Amount	\$10.00
Payment Method	Credit Card
Campaign	COVID-19 Campaign
Effective Date	10/27/2020
Schedule End Date	None
Installation Period	Monthly
Installation	3
Frequency	
Day of Month	3

Elevate Information

Upcoming Installments

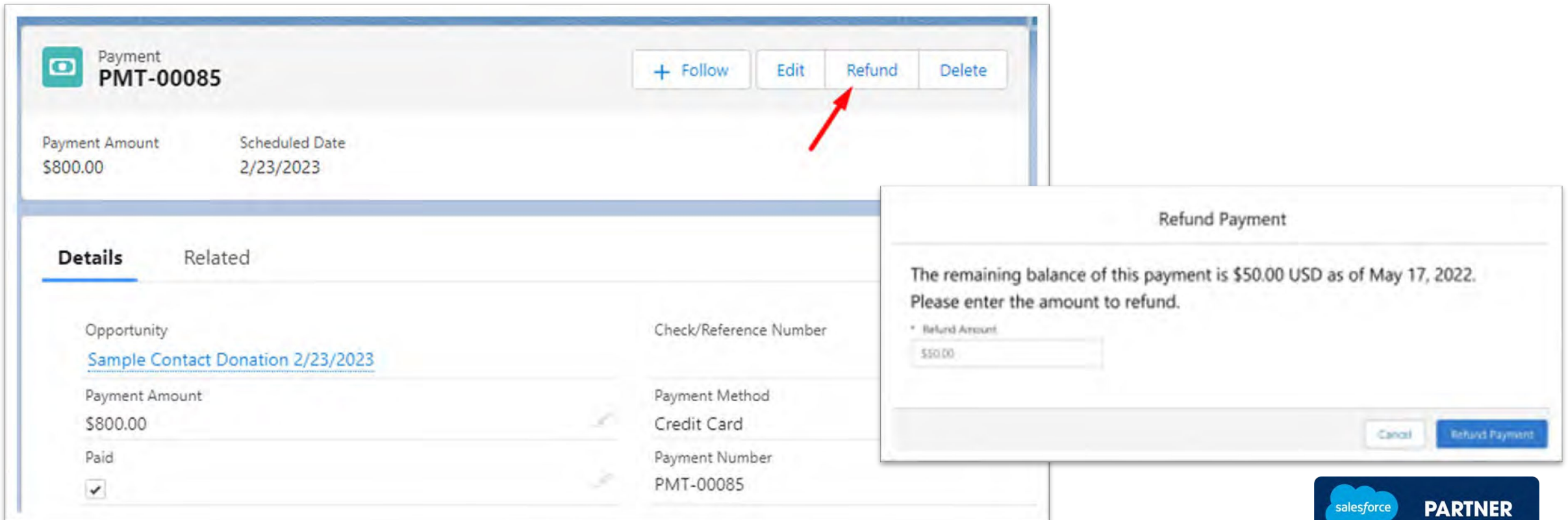
Date	Amount	Payment M...	
07/22/2020	\$75.00	ACH/EFT	
08/22/2020	\$75.00	ACH/EFT	
09/22/2020	\$75.00	ACH/EFT	Paused
10/22/2020	\$75.00	ACH/EFT	Paused
11/22/2020	\$75.00	ACH/EFT	Paused
12/22/2020	\$75.00	ACH/EFT	Paused
01/22/2021	\$75.00	ACH/EFT	
02/22/2021	\$75.00	ACH/EFT	
03/22/2021	\$75.00	ACH/EFT	
04/22/2021	\$75.00	ACH/EFT	
05/22/2021	\$75.00	ACH/EFT	
06/22/2021	\$75.00	ACH/EFT	





Refunds

- Refunds and Partial Refunds **now supported** for Elevate and Non-Elevate Payments



The screenshot displays a Salesforce record for a payment with ID **PMT-00085**. The record shows a payment amount of \$800.00 and a scheduled date of 2/23/2023. The record is associated with the opportunity **Sample Contact Donation 2/23/2023**. The payment method is **Credit Card** and the payment number is **PMT-00085**. The payment is marked as **Paid**.

A red arrow points to the **Refund** button in the record's action bar. A modal window titled **Refund Payment** is open, displaying the following text:

The remaining balance of this payment is \$50.00 USD as of May 17, 2022. Please enter the amount to refund.

The modal includes a field for **Refund Amount** with the value **\$50.00** entered. At the bottom of the modal, there are **Cancel** and **Refund Payment** buttons.





Key Salesforce.com Enhancements

Lightning Reports
& Dashboards

Activities &
Moves
Management

Topics for
Salesforce
Admins



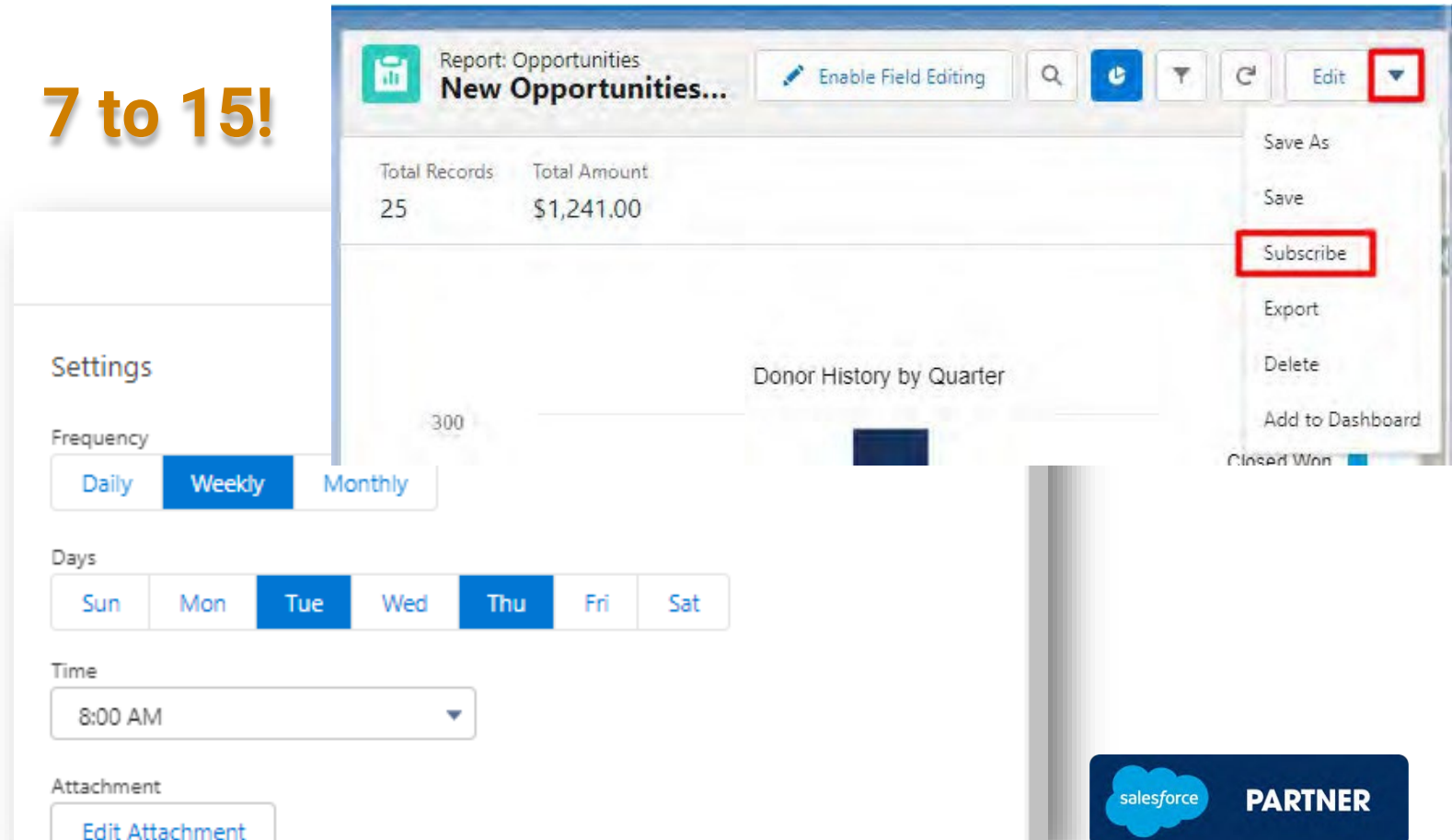
PARTNER



Lightning Reports & Dashboards

- **Subscribe** to more reports and dashboards!
- **"Edit in Classic"** button is gone!
- **Admins can report** on subscribers

7 to 15!



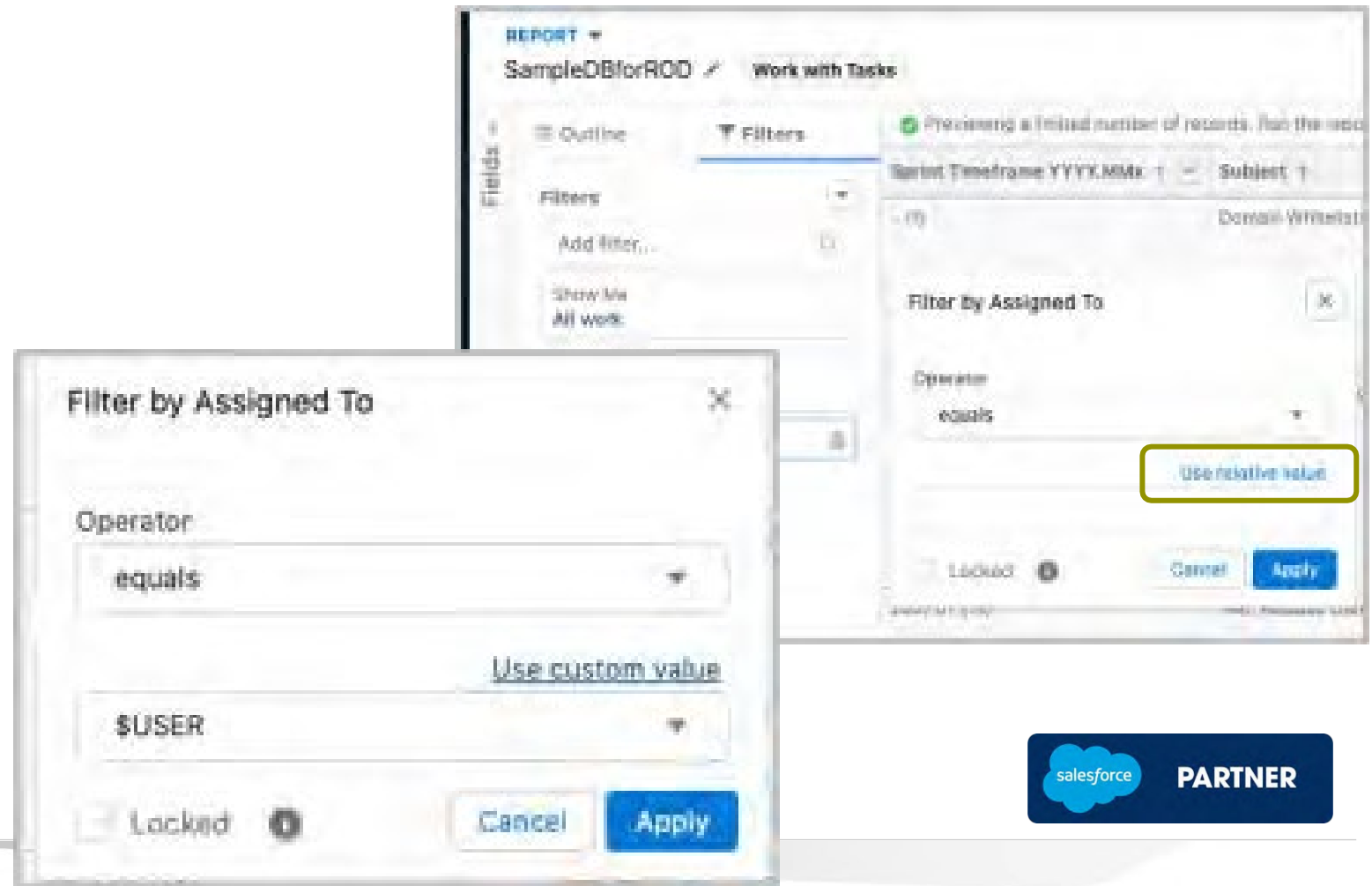
The screenshot shows a Salesforce Lightning report titled "Report: Opportunities New Opportunities...". The report displays summary statistics: Total Records: 25, Total Amount: \$1,241.00. Below the summary is a chart titled "Donor History by Quarter" with a value of 300. The interface includes a settings panel on the left with options for Frequency (Daily, Weekly, Monthly), Days (Sun, Mon, Tue, Wed, Thu, Fri, Sat), Time (8:00 AM), and Attachment (Edit Attachment). A dropdown menu is open from the "Edit" button, showing options: Save As, Save, **Subscribe** (highlighted with a red box), Export, Delete, and Add to Dashboard. A "Closed Won" status is also visible at the bottom right of the report area.





Lightning Reports & Dashboards

- Personalize Report Filters
 - Reference current user in reports using "\$USER"



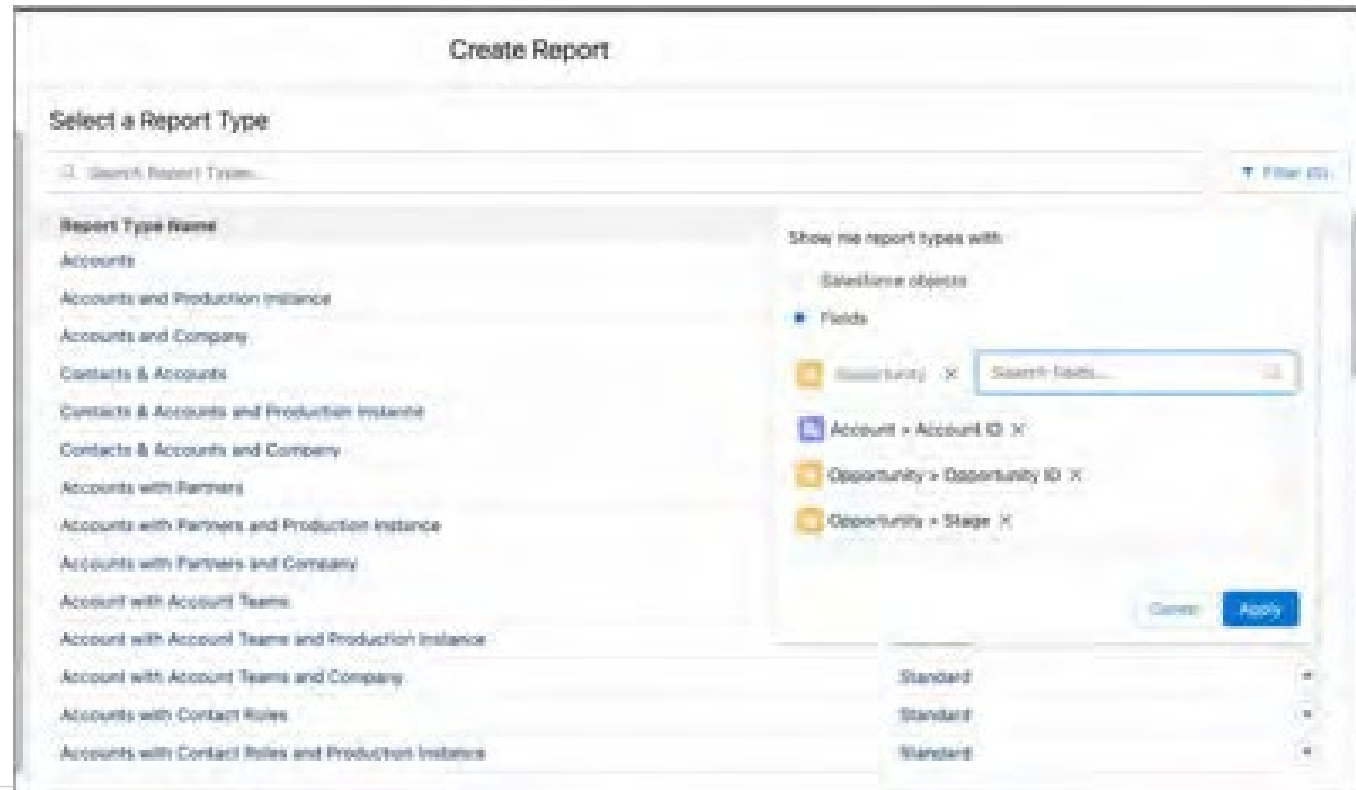
The image shows a screenshot of the Salesforce Lightning Reports interface. The main window displays a report titled "SampleOBforROD" with a "Filters" section. A dialog box titled "Filter by Assigned To" is open, showing the "Operator" set to "equals" and the "Value" set to "\$USER". A yellow box highlights the "Use relative value" button in the background. The dialog also includes a "Locked" checkbox, "Cancel", and "Apply" buttons.





Lightning Reports & Dashboards

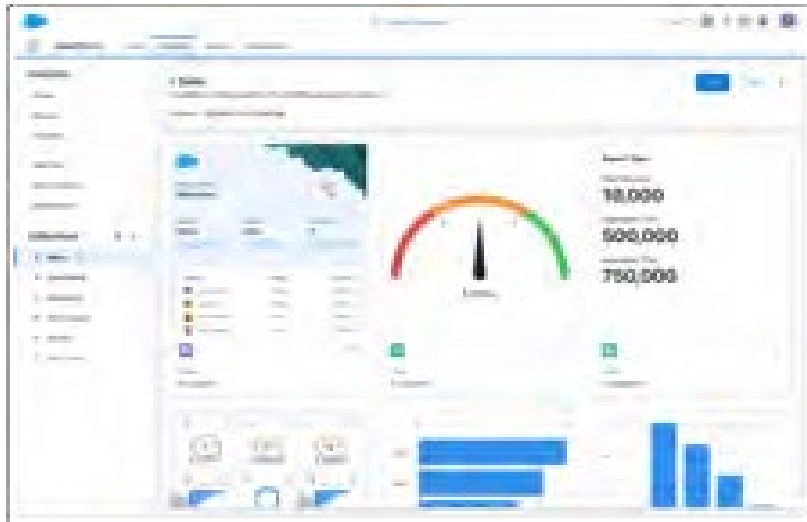
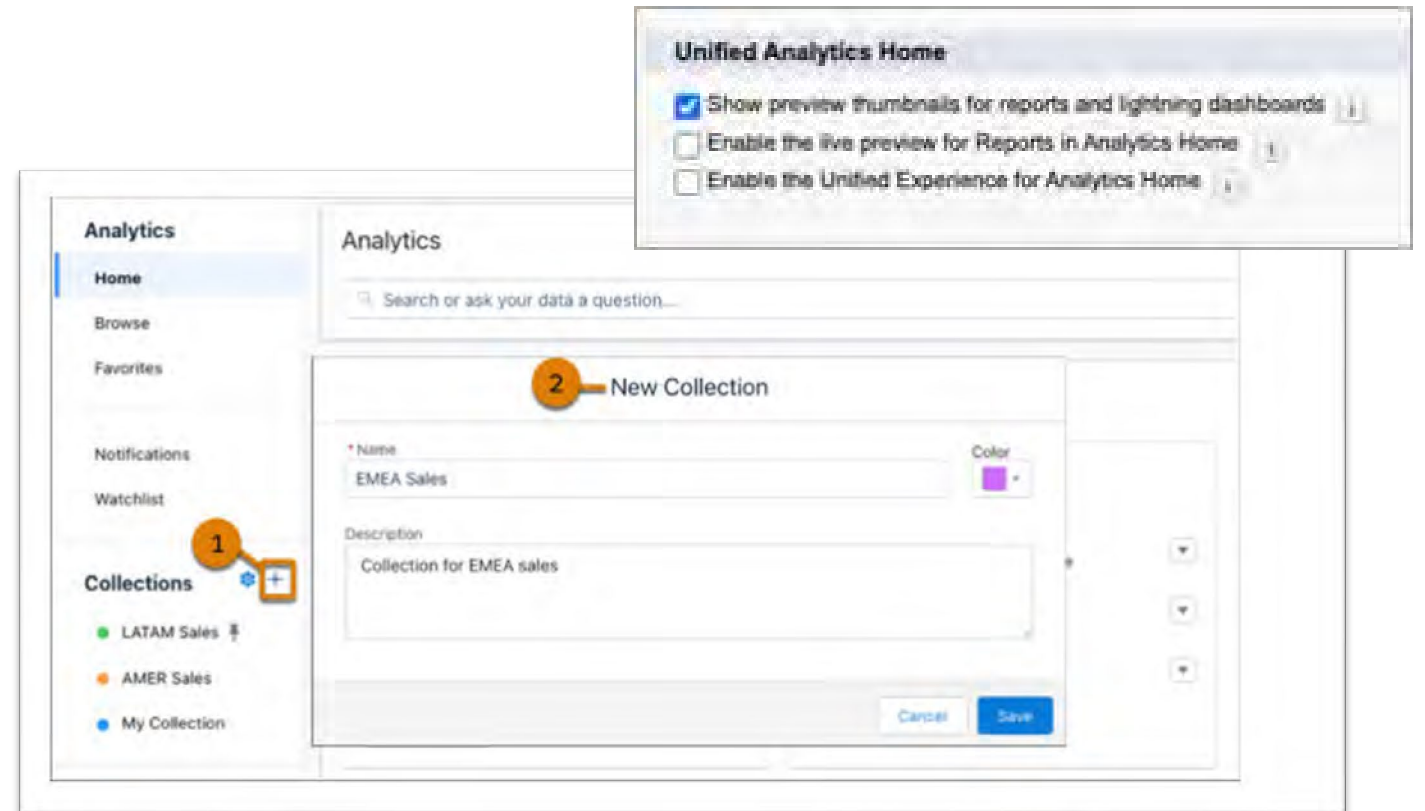
- Filter report types by **objects** & **fields**





Lightning Reports & Dashboards

- Collections for Reports and Dashboards
 - Admins should enable **Unified Home**

The screenshot shows the Salesforce Analytics interface. On the left, there is a sidebar with 'Analytics' and 'Collections' sections. The 'Collections' section lists 'LATAM Sales', 'AMER Sales', and 'My Collection'. A plus sign icon is highlighted with a red circle labeled '1'. In the main area, a 'New Collection' dialog box is open, showing a search bar and a form with the following fields:

- Name: EMEA Sales
- Color: Purple
- Description: Collection for EMEA sales

 The dialog box has 'Cancel' and 'Save' buttons. A red circle labeled '2' points to the 'New Collection' title. A callout box titled 'Unified Analytics Home' is positioned above the dialog, containing the following settings:

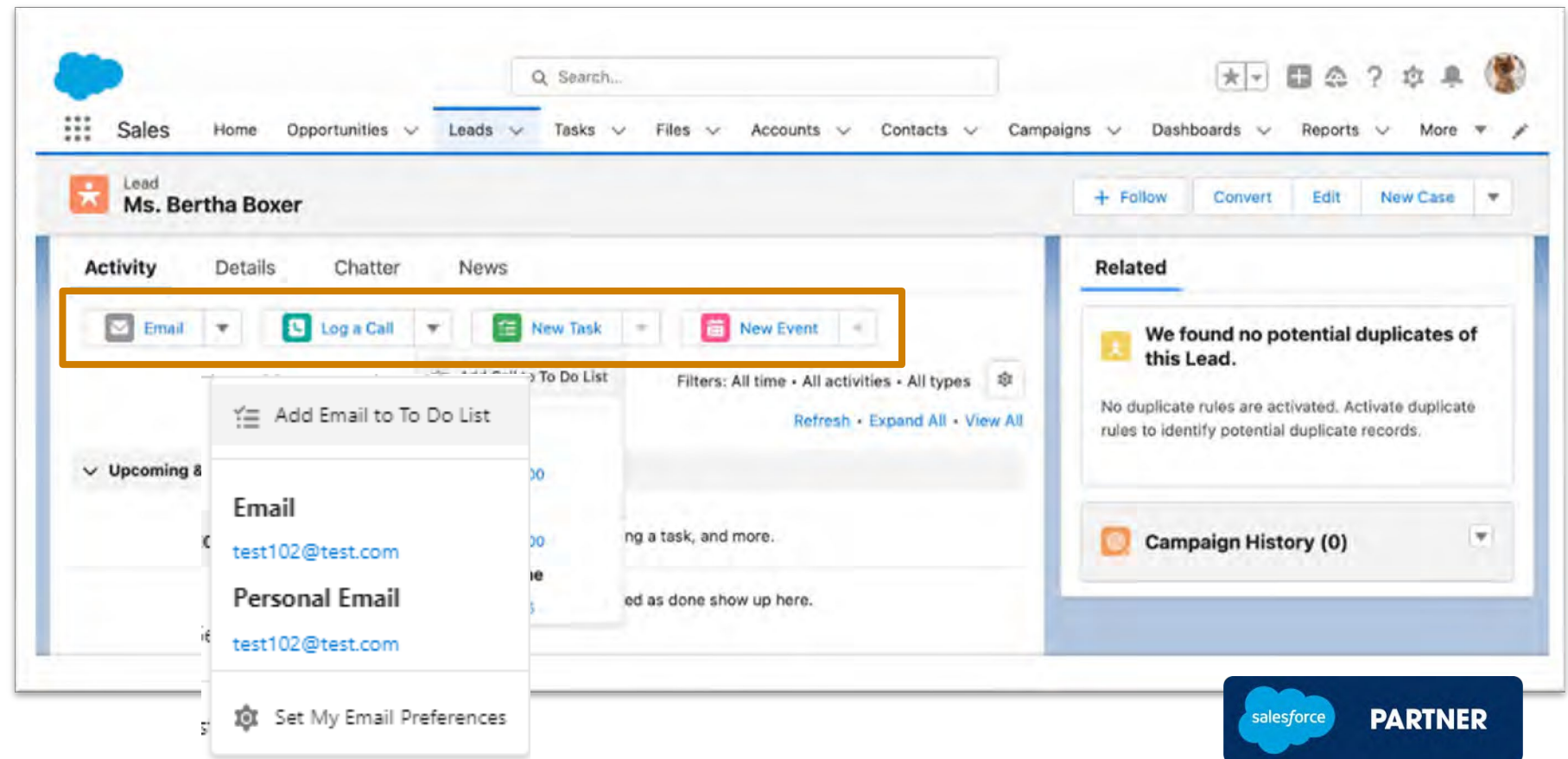
- Show preview thumbnails for reports and lightning dashboards
- Enable the live preview for Reports in Analytics Home
- Enable the Unified Experience for Analytics Home





Dynamic Activity Composer

- **New** button-menu design
- **More** actions on the composer

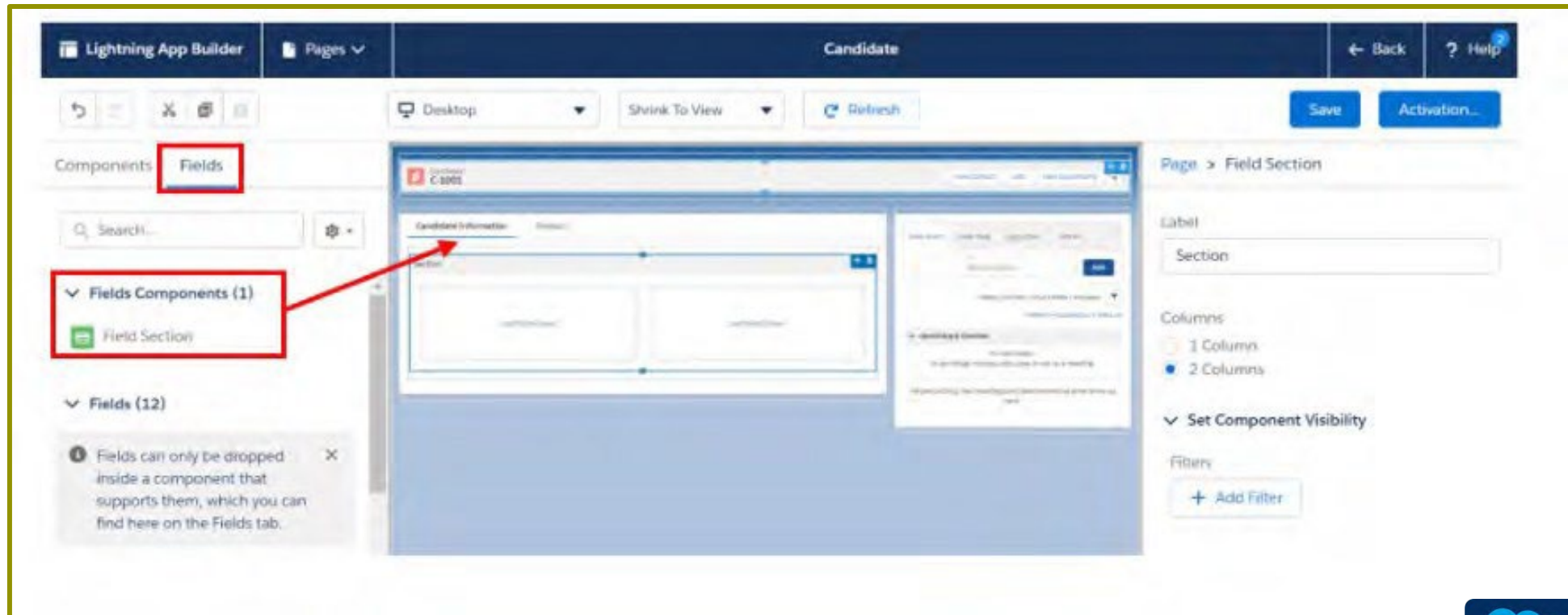


The screenshot displays the Salesforce interface for a lead named Ms. Bertha Boxer. The 'Activity' tab is active, and a dynamic activity composer is shown. The composer includes buttons for 'Email', 'Log a Call', 'New Task', and 'New Event'. A menu is open over the 'Email' button, showing options: 'Add Email to To Do List', 'Email', 'Personal Email', and 'Set My Email Preferences'. The 'Email' and 'Personal Email' options both show the email address 'test102@test.com'. The background shows the lead's details, a search bar, and navigation tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, and More. A 'Related' section on the right contains a message about potential duplicates and a 'Campaign History (0)' link.





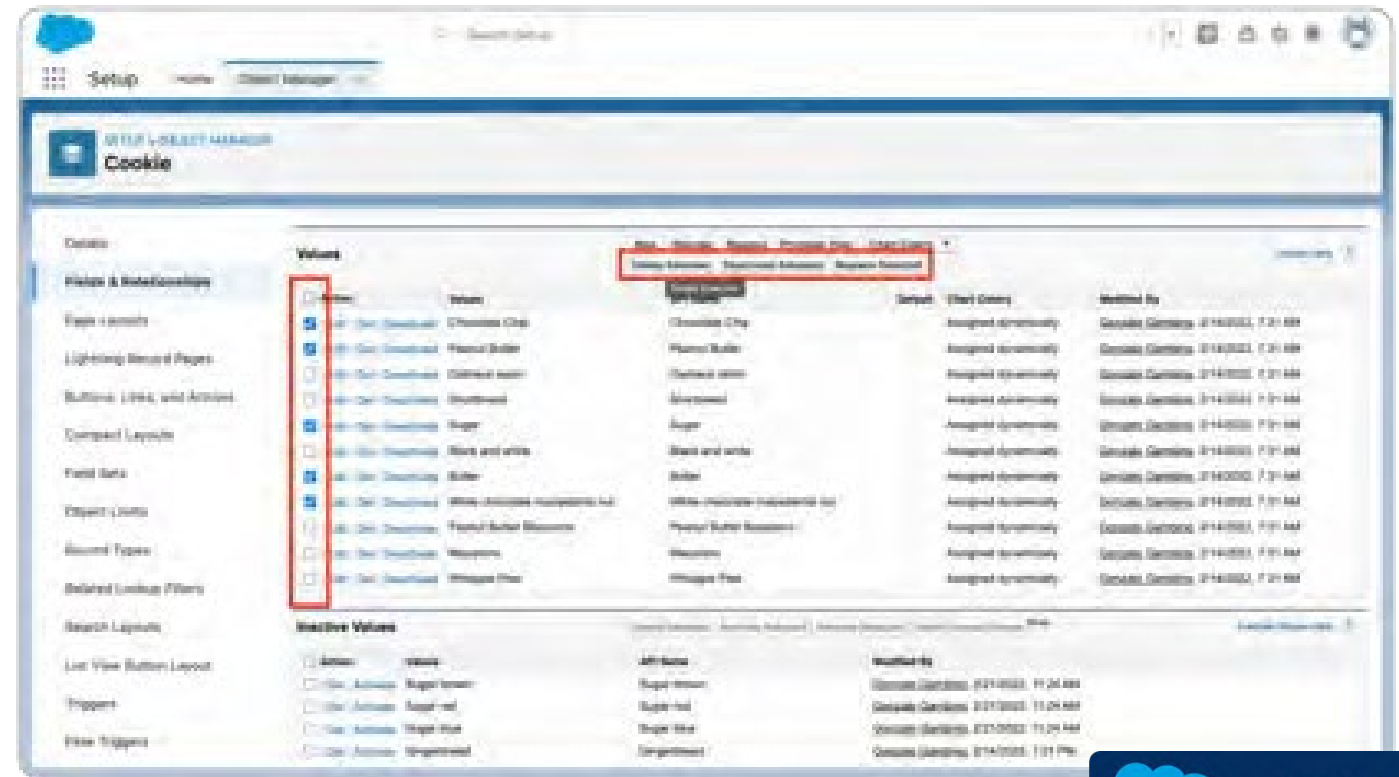
Dynamic Forms now for Leads and Cases





Bulk Manage Picklist Values

- Perform Mass Operations
- Catch Duplicate Values at insert
- Identify Clean-Up Candidates



The screenshot shows the Salesforce Setup interface for managing Picklist Values. The main table displays the following data:

Value	Label	Default	Used On	Modified By
Chowder City	Chowder City	Assigned Systemly		Genelle Gentry (140000) 7/21/14
Floury Bule	Floury Bule	Assigned Systemly		Genelle Gentry (140000) 7/21/14
Glucose wain	Glucose wain	Assigned Systemly		Genelle Gentry (140000) 7/21/14
Glucose	Glucose	Assigned Systemly		Genelle Gentry (140000) 7/21/14
Rupe	Rupe	Assigned Systemly		Genelle Gentry (140000) 7/21/14
Black and white	Black and white	Assigned Systemly		Genelle Gentry (140000) 7/21/14
White	White	Assigned Systemly		Genelle Gentry (140000) 7/21/14
White (includes subcategory)	White (includes subcategory)	Assigned Systemly		Genelle Gentry (140000) 7/21/14
Floury Bule Biscuits	Floury Bule Biscuits	Assigned Systemly		Genelle Gentry (140000) 7/21/14
Waffles	Waffles	Assigned Systemly		Genelle Gentry (140000) 7/21/14
Waffle Pie	Waffle Pie	Assigned Systemly		Genelle Gentry (140000) 7/21/14

Below the main table, there is a section for 'Inactive Values' which includes:

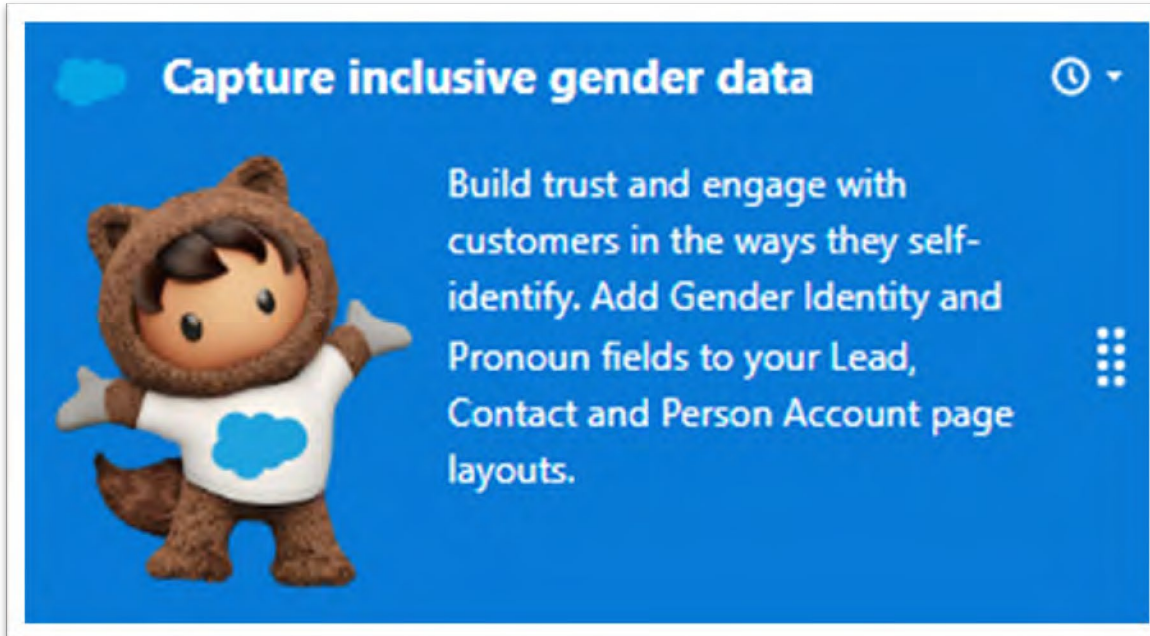
Value	Label	Default	Modified By
Apple	Apple		Genelle Gentry (140000) 11/24/14
Apple	Apple		Genelle Gentry (140000) 11/24/14
Apple	Apple		Genelle Gentry (140000) 11/24/14
Apple	Apple		Genelle Gentry (140000) 11/24/14





Gender Identity & Pronouns Fields

- **Capture inclusive data** with gender identity and pronoun fields



Capture inclusive gender data

Build trust and engage with customers in the ways they self-identify. Add Gender Identity and Pronoun fields to your Lead, Contact and Person Account page layouts.

The card features a blue background with a white cloud icon on the left, a clock icon in the top right, and a three-dot menu icon on the right side. A cartoon character wearing a brown bear hoodie and a white t-shirt with a blue cloud logo is positioned on the left.

**PARTNER**



Field History Tracking on Events and Tasks

Event Call

Location: 1001, 12/01/2022, End: 12/02/2022

Details: **Related**

Event History (5)

Date	Field	Modified By	Original Value	New Value
12/01/2022, 01:19 PM	Due Date Only	Betty Arnold	11/03/2022	12/01/2022
12/01/2022, 01:19 PM	Due Date Time	Betty Arnold	12/01/2022 09:00 AM	12/01/2022 04:00 PM
12/01/2022, 01:19 PM	Due Date Time	Betty Arnold	12/01/2022 04:00 PM	
12/01/2022, 01:19 PM	All-Day Event	Betty Arnold	False	True
12/01/2022, 01:19 PM	Created	Betty Arnold		

Attachments (0)

Event Field History

This page allows you to select the fields you want to track on the Event History related list. Whenever a user modifies any of the fields, values are added to the History related list as well as the date, time, nature of the change, and user making the change. Note that multiple values are tracked as edited; their old and new field values are not recorded.

Save Cancel

Deselect all fields

Track old and new values

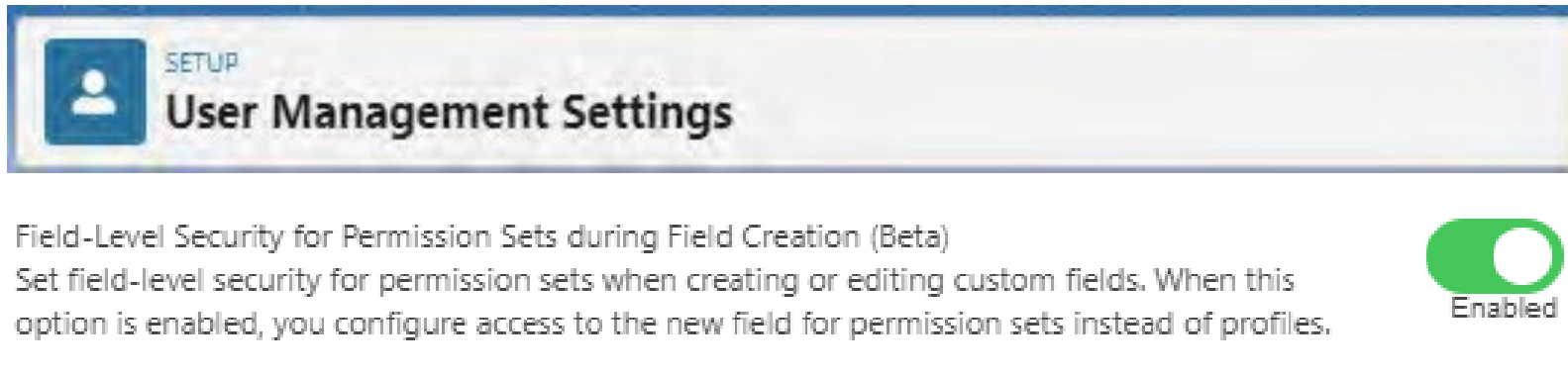
ActivityRecurrence2 <input type="checkbox"/>	ActivityRecurrence2Exception <input type="checkbox"/>
All-Day Event <input type="checkbox"/>	Assigned To <input type="checkbox"/>
Create Recurring Series of Events <input type="checkbox"/>	Date <input type="checkbox"/>
Duration <input type="checkbox"/>	Engagement Plan <input type="checkbox"/>
Engagement Plan Task <input type="checkbox"/>	Group Event Type <input type="checkbox"/>
Historical Event, Not Following Recurrence <input type="checkbox"/>	Location <input type="checkbox"/>
Name <input type="checkbox"/>	Pattern Version <input type="checkbox"/>
Private <input type="checkbox"/>	Proposed Event Timeframe <input type="checkbox"/>
Public <input type="checkbox"/>	Recurrence Activity <input type="checkbox"/>
Recurrence Day of Month <input type="checkbox"/>	Recurrence Day of Week Mask <input type="checkbox"/>
Recurrence End <input type="checkbox"/>	Recurrence Instance <input type="checkbox"/>





Set Field Level Security for Permission Sets During Field Creation (Beta)

- Enable Field-Level Security for Permissions Sets During Field Creation



SETUP
User Management Settings

Field-Level Security for Permission Sets during Field Creation (Beta)
Set field-level security for permission sets when creating or editing custom fields. When this option is enabled, you configure access to the new field for permission sets instead of profiles.

Enabled





Set Field Level Security for Permission Sets During Field Creation

- Set Permissions at field creation

Custom Field Definition Detail

[Edit](#)
[Set Field-Level Security](#)
[View Field Accessibility](#)
[Where is this used?](#)

Field Information

Field Label	Intacct Entity	Object Name	Contact
Field Name	Intacct_Entity	Data Type	Lookup
Namespace Prefix	ia_crm		
API Name	ia_crm__Intacct_Entity__c		
Description			

Contact
New Custom Field

Step 3 of 4: Establish field-level security

Field Label: Test Field
Data Type: Text
Field Name: Test_Field
Description:

This list includes permission sets that have Create, Read, Edit or Delete access for this field's object. If no permission sets have that access for this field's object, the list includes all permission sets.

Select the permission sets to which you want to grant access to this field via field-level security. If you don't select at least one permission set, this field is hidden from all permission sets.

Permission sets with object permissions

Permission Set Name	Object Name	Read Access	Edit Access
Intacct Connect	Intacct_Connect	<input type="checkbox"/>	<input type="checkbox"/>
JournalEntryCustom	ia_crm_JournalEntryCustom	<input type="checkbox"/>	<input type="checkbox"/>
Standard User + Files Connect	Standard_User_Files_Connect	<input type="checkbox"/>	<input type="checkbox"/>





Upgraded Migrate to Flow Tool

- Workflow and Process Builder to retire soon


SETUP

Migrate to Flow

Migrate to Flow!

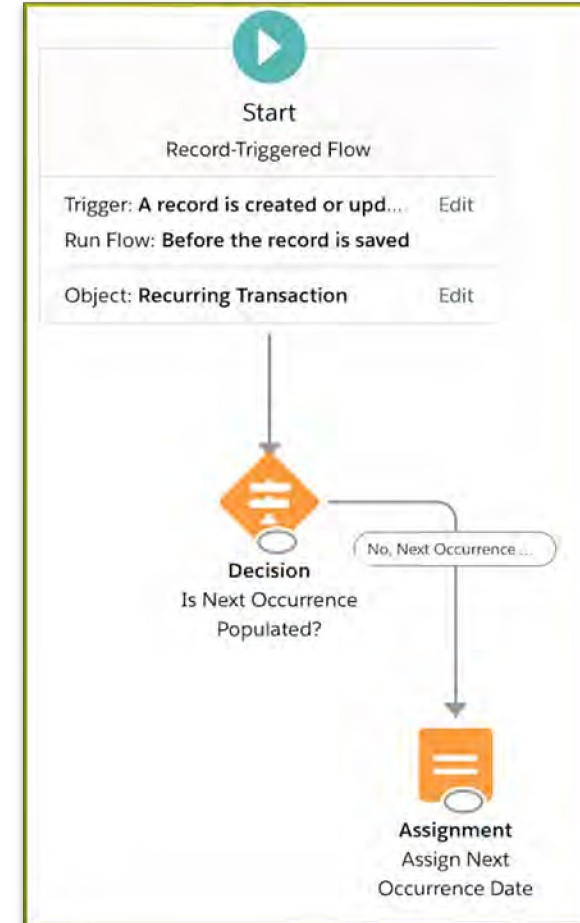
We're retiring Workflow Rules and Processes in the near future. To ease your transition to Flow, we created a tool to convert your existing automations to flows. [Tell Me More](#)

Learn more about what workflow rules and processes the Migrate to Flow tool can convert. Also learn manual conversion methods for your edge cases. [Tell Me More](#)



2 Items · Sorted by Type
Migrate to Flow

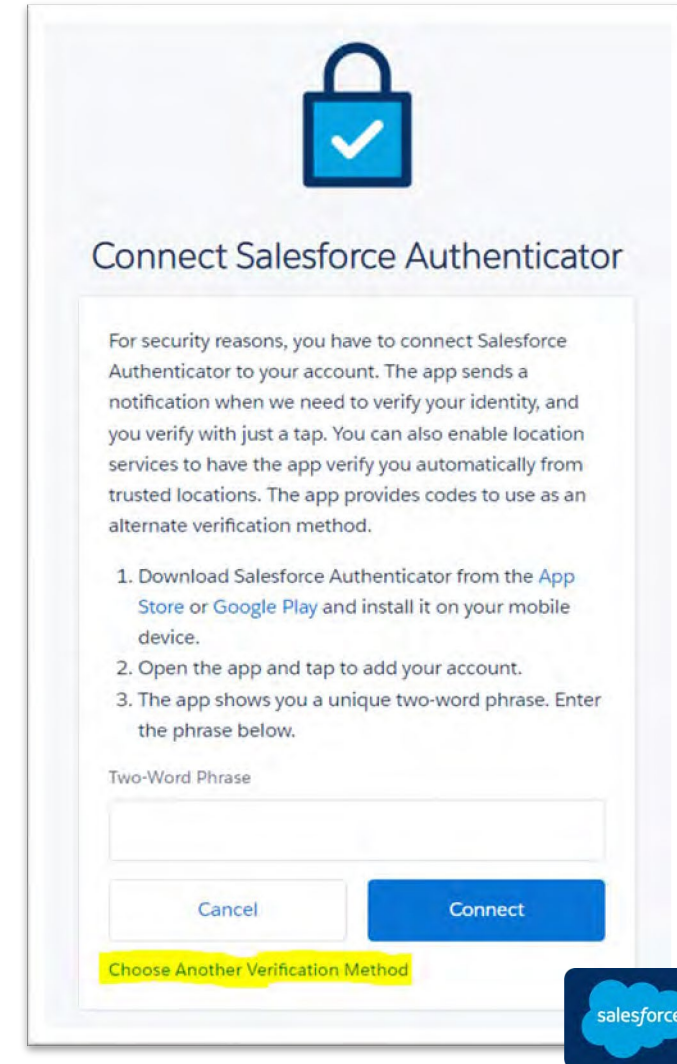
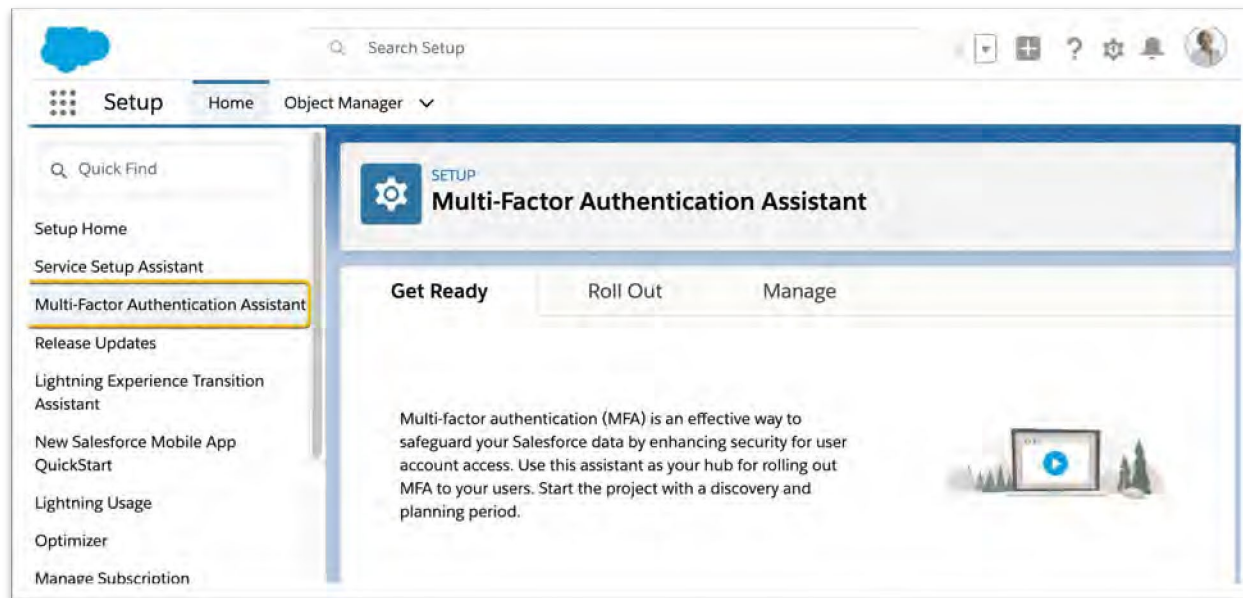
Name	Type ↓	Object	Status	Resulting Flow
<input type="checkbox"/> Activate New Account	Workflow Rule	Account	Active	Activate New Account ▼
<input checked="" type="checkbox"/> Account Handler Proce...	Process	Account	Active	▼





MFA Auto-Enablement is here!

- With the Spring '23 release, Salesforce will **enable MFA for direct logins**





#2 Polling Question



PARTNER



#3 Polling Question



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!](#)





NOT SURE WHERE TO START?

Salesforce Health Check

Overview

For clients already using Salesforce, Armanino offers a complimentary Health Check, assessing your return on investment (ROI) and risk review, with a focus on mission-critical items.

- Custom code versus configuration
- Custom field counts, data storage and API limits
- Effective use of process builders and workflows; and a high-level assessment of the components in use by the client.
- Effective use of out-of-the-box functionality
- Deployment status of recent Salesforce functionality
- Available user and feature licenses
- Lightning readiness, if applicable

What You Can Expect



2-3 Hours of User Interviews

Meet with Salesforce subject matter experts for 2-3 hours with the client's Salesforce user group.



Assessment Report

Report detailing the assessment performed and the health of client's Salesforce org, with explanations of critical items that may need attention, including a high-level estimate of the cost to implement the recommended actions.







THANK YOU
Additional Questions?

Reach out to us at

Experts@armanino.com

Armanino Operates in an Alternative Practice Structure:

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