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March 2, 2023

Latest Updates in the Salesforce Spring '23 Release

Nonprofit

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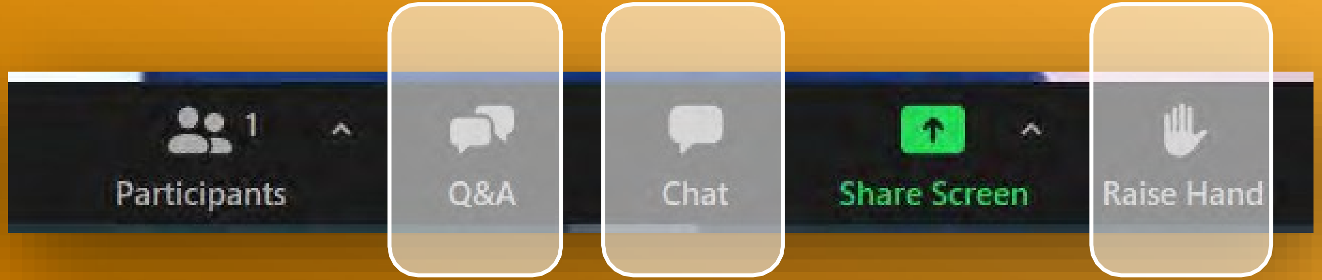
QUICK TIPS

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

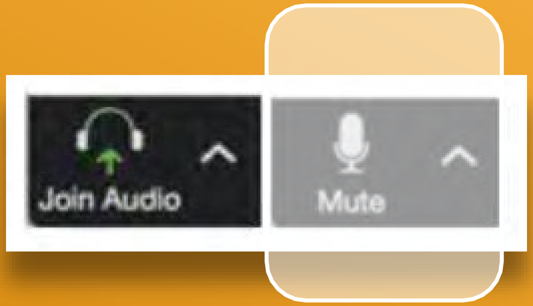
- Click the Chat button to open the chat panel
- Type your message in the Text box at the bottom of the panel
- Press Enter to send your message

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

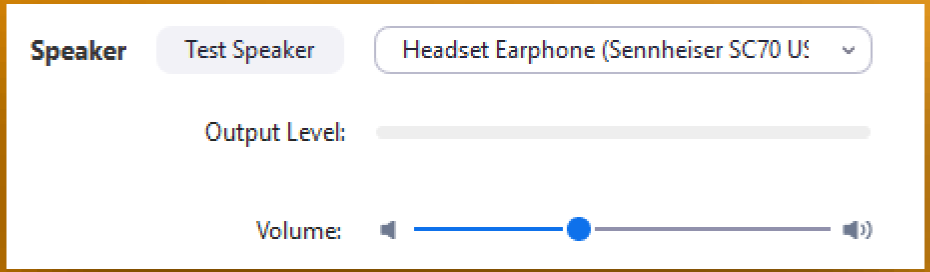


Mute | Unmute

- 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

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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

Source: Salesforce.org

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Nonprofit Cloud

Grants Management for Grant Making	Program Management	Elevate

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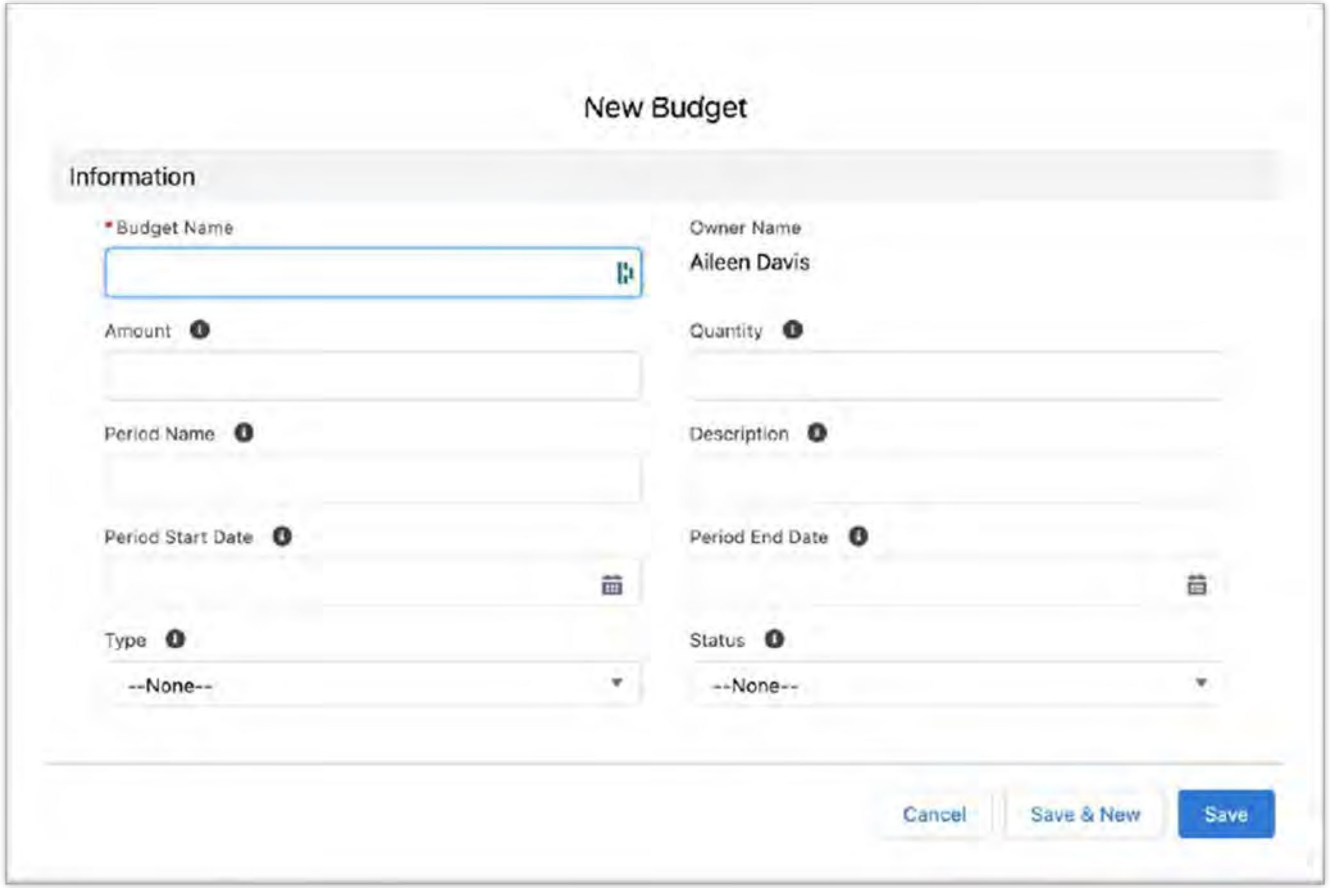
Grants Management

- **Track Budgets**
  - **New Category and Period Entities:**

    Budget Category, Budget Category Value and Budget Period



💡💡 *Community Idea Delivered!*

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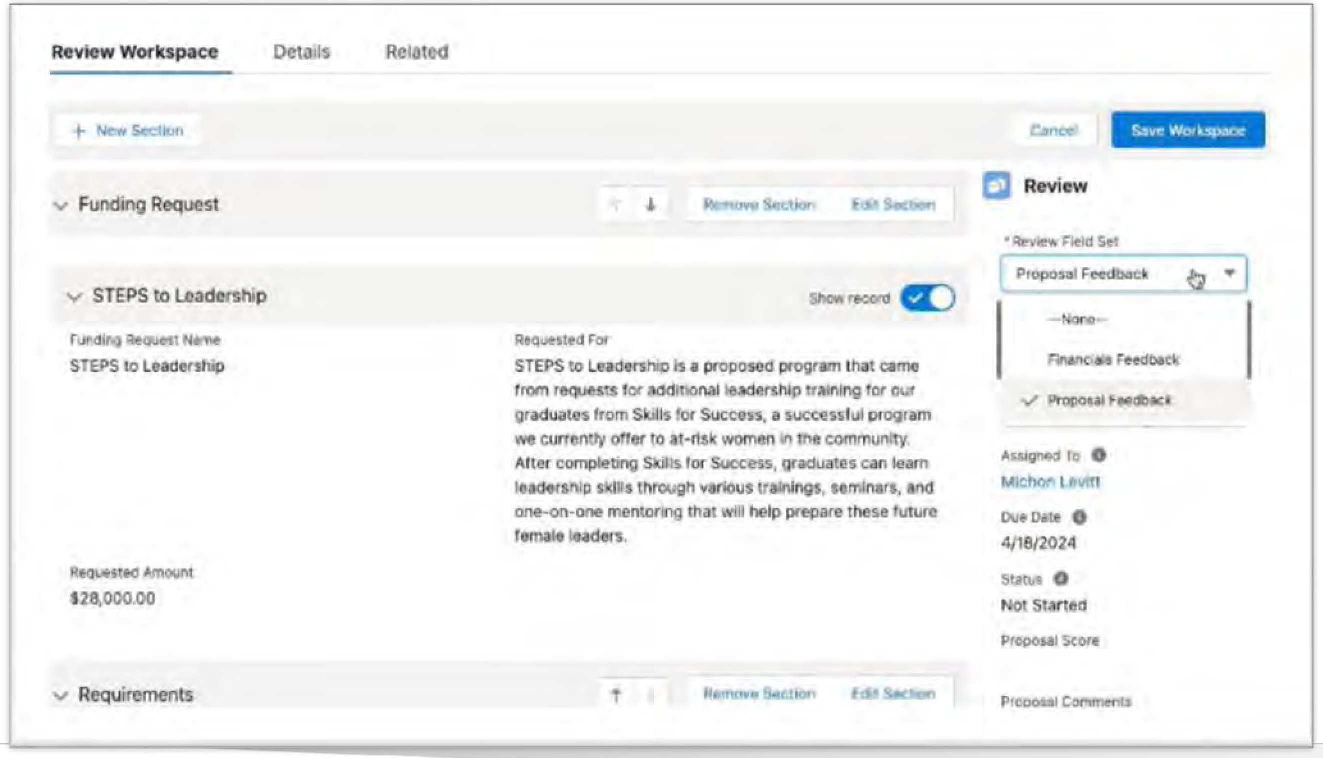
Grant Application Review

- Segment feedback based on reviewer role!



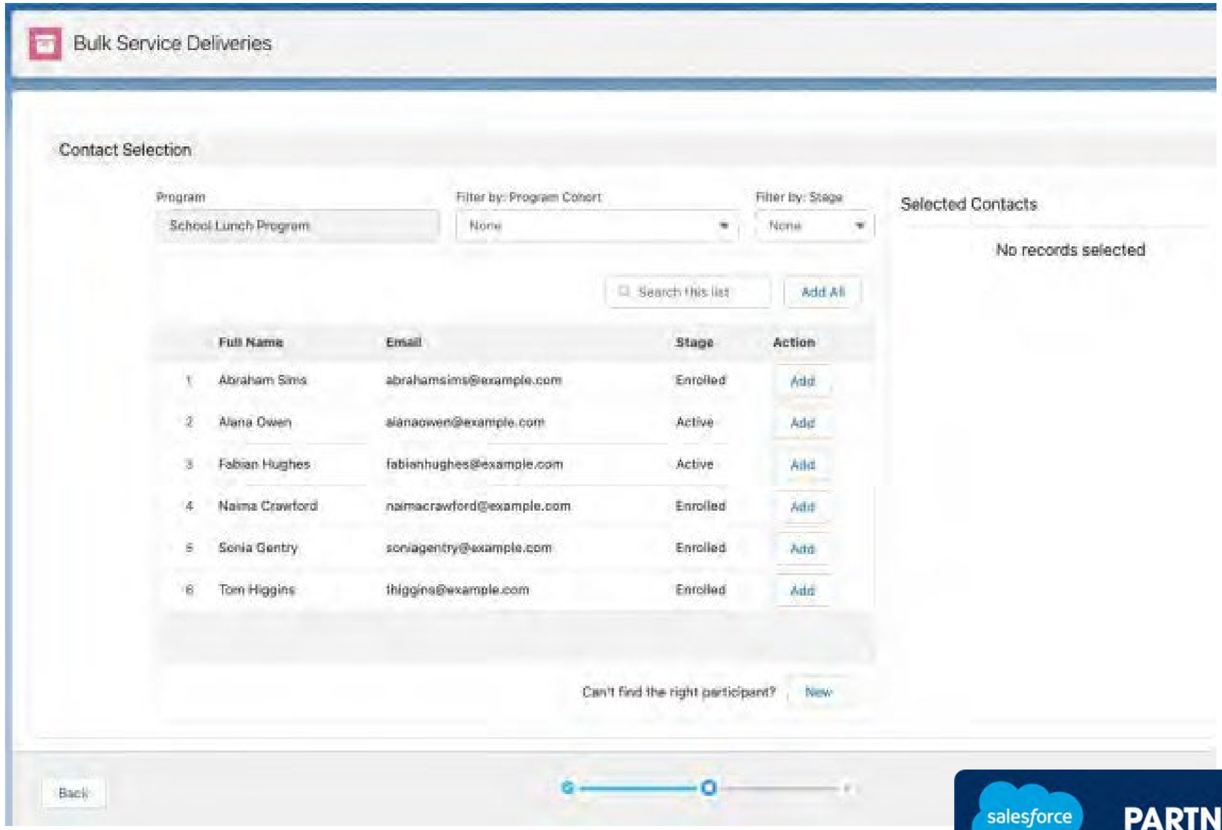
Program Management Module

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

💡💡 *Communty Idea Delivered!*

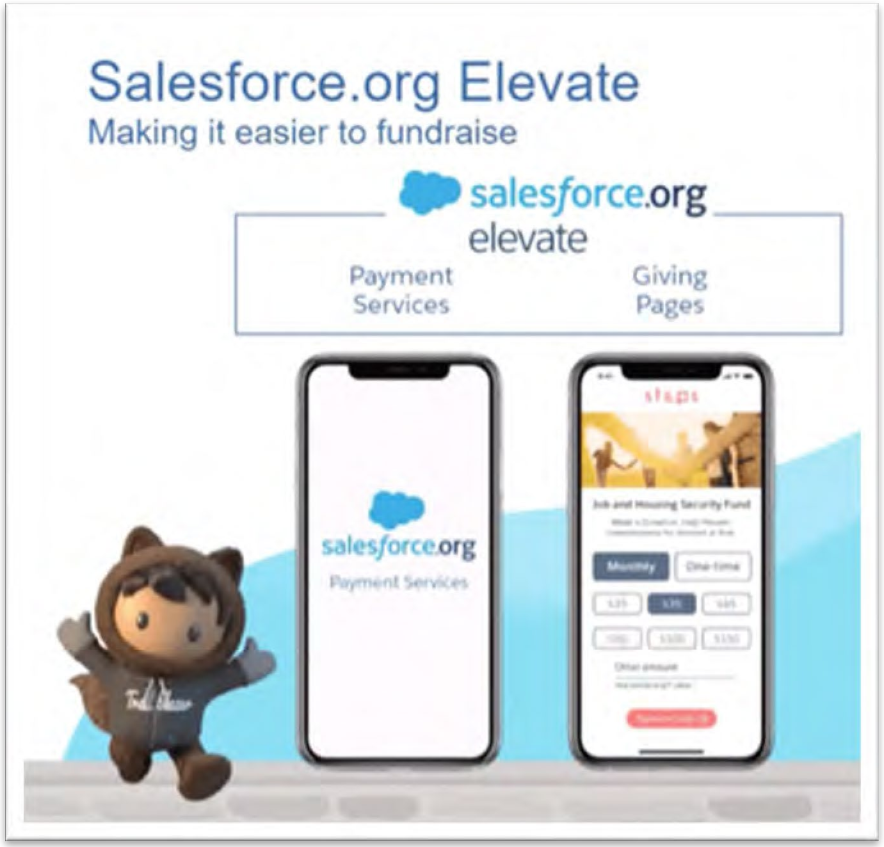
Program Management Module

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



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



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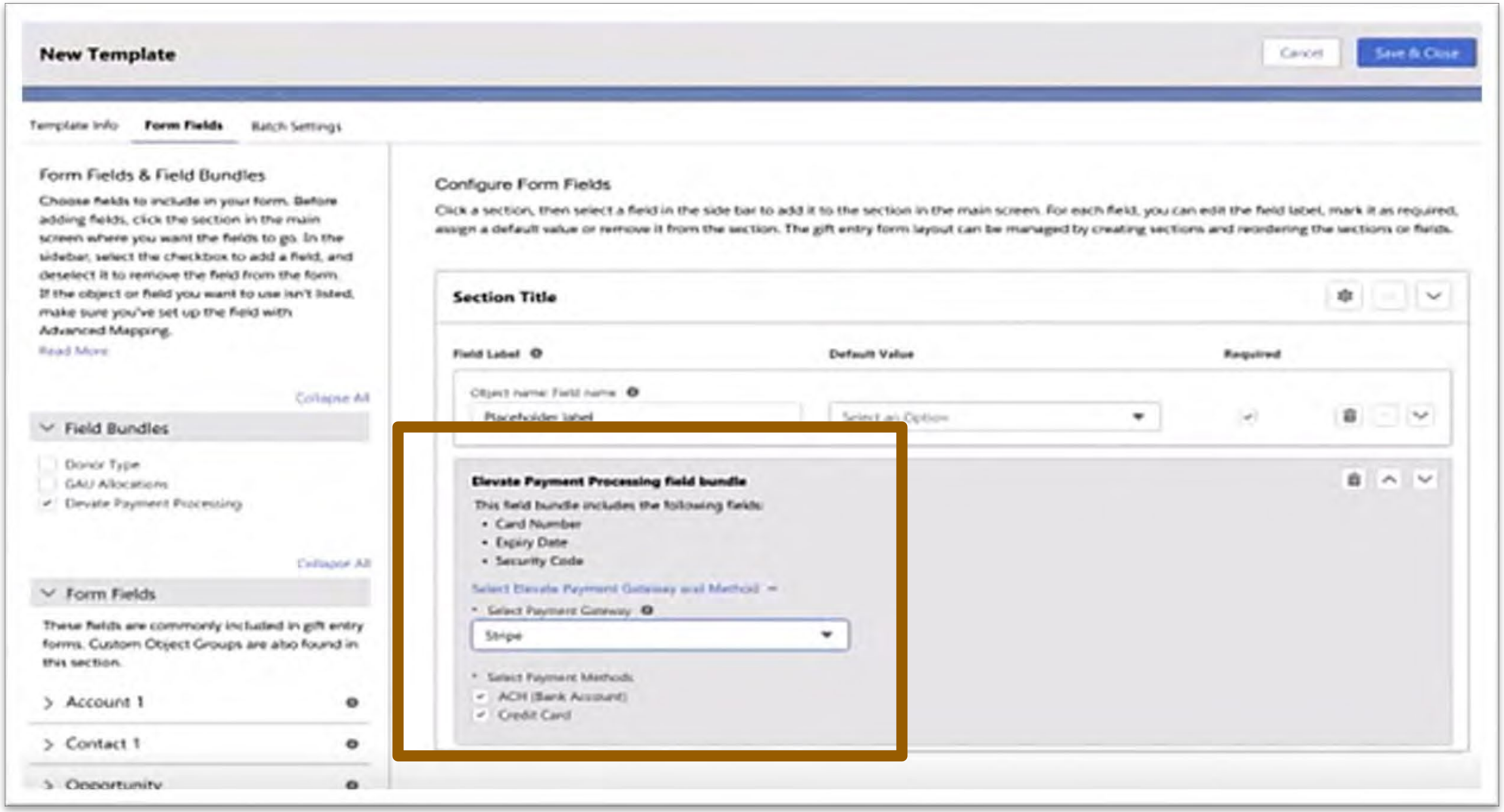
Elevate Gift Entry and Gateway Assignment



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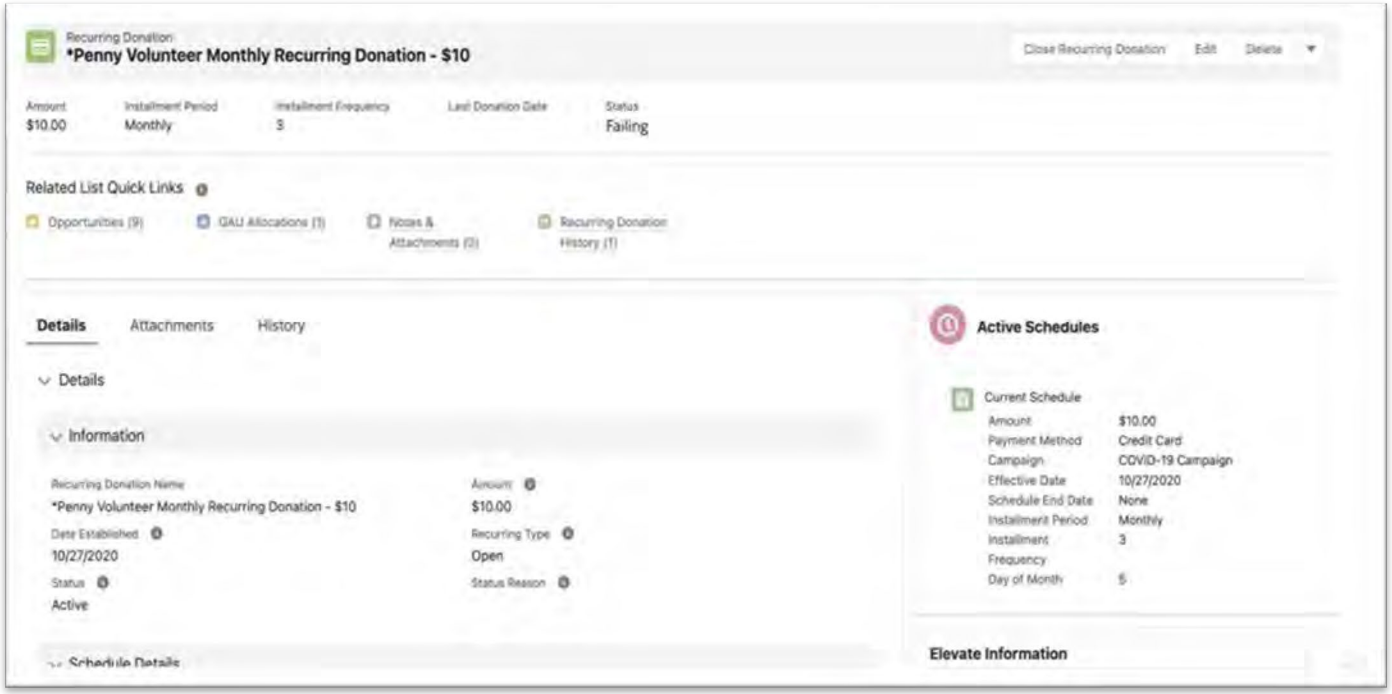
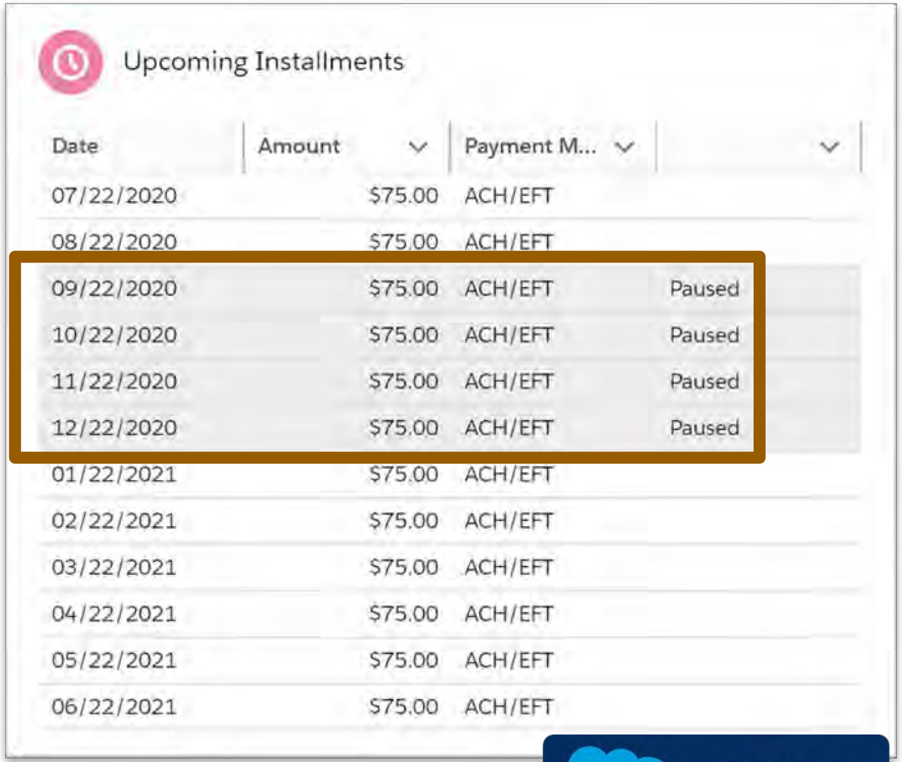
Gateway and Payment Method

- Pause an elevate-connected recurring donation within NPSP!





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	

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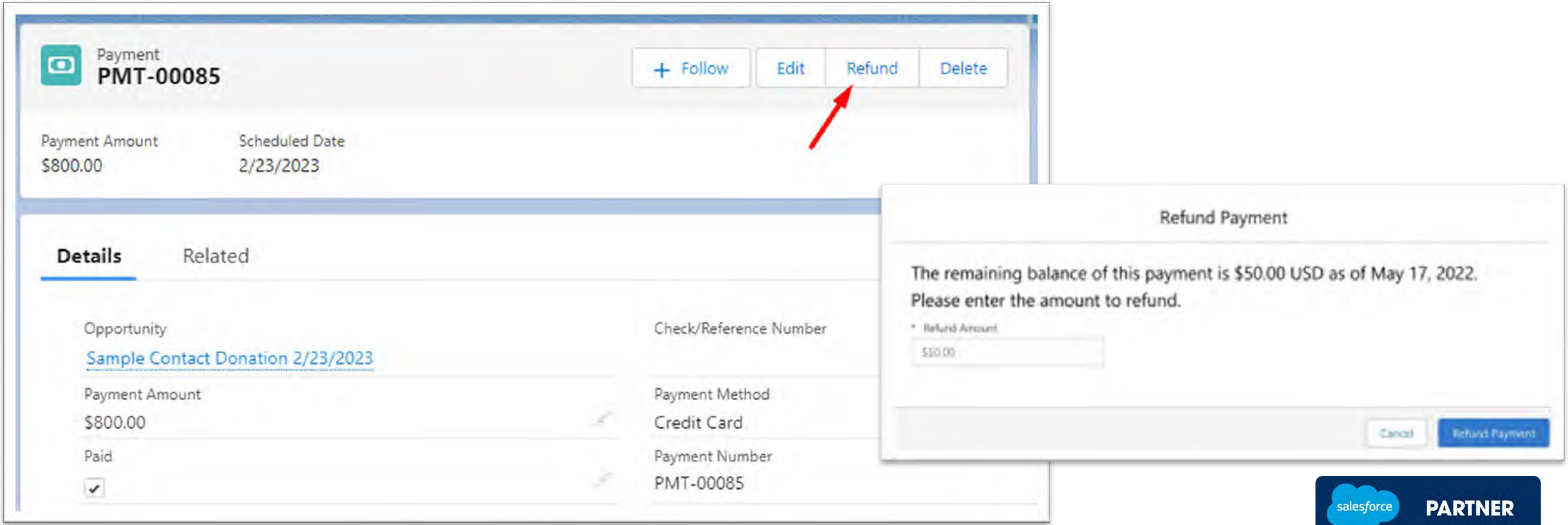
Refunds

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



Key Salesforce.com Enhancements

Lightning Reports & Dashboards	Activities & Moves Management	Topics for Salesforce Admins

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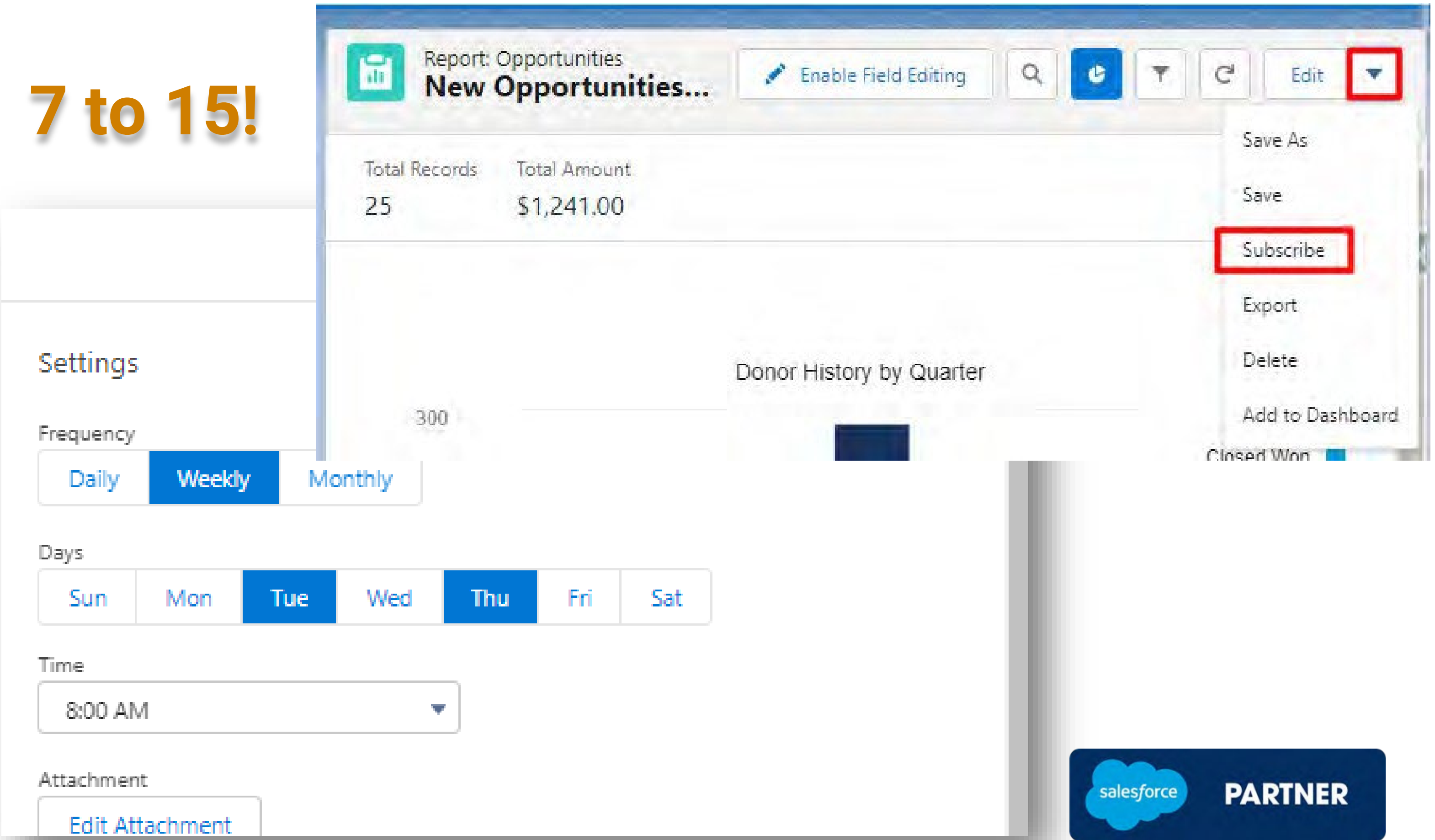
Lightning Reports & Dashboards

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

7 to 15!



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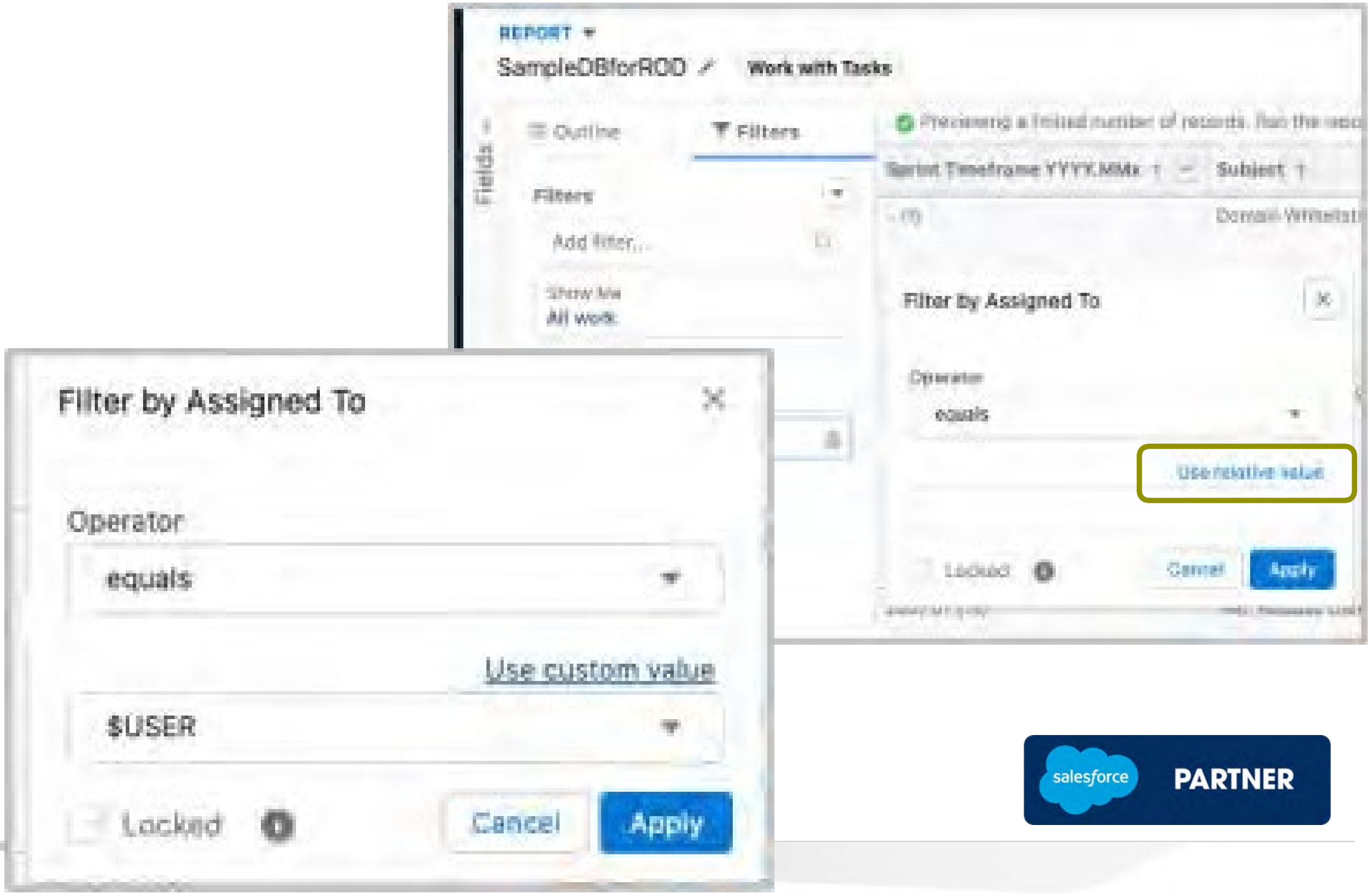
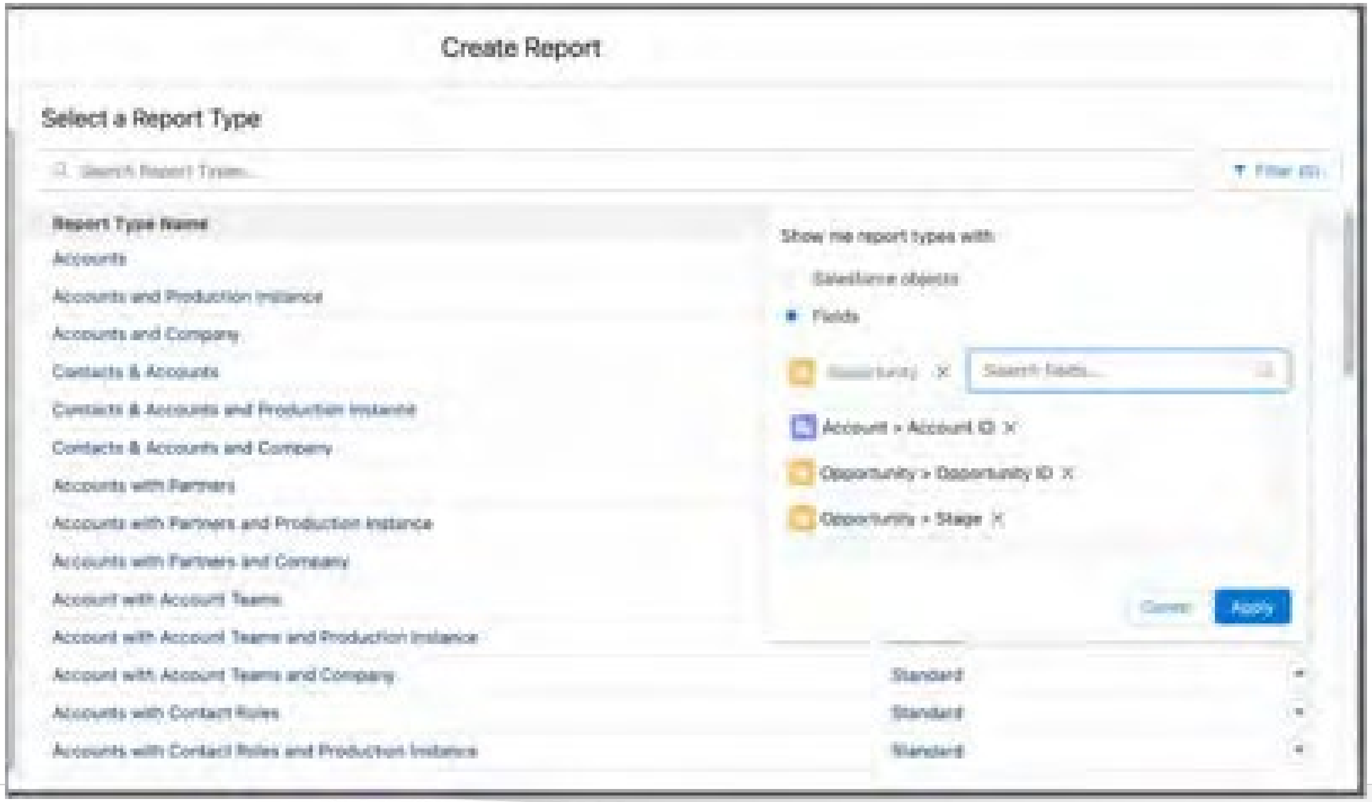
Lightning Reports & Dashboards

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



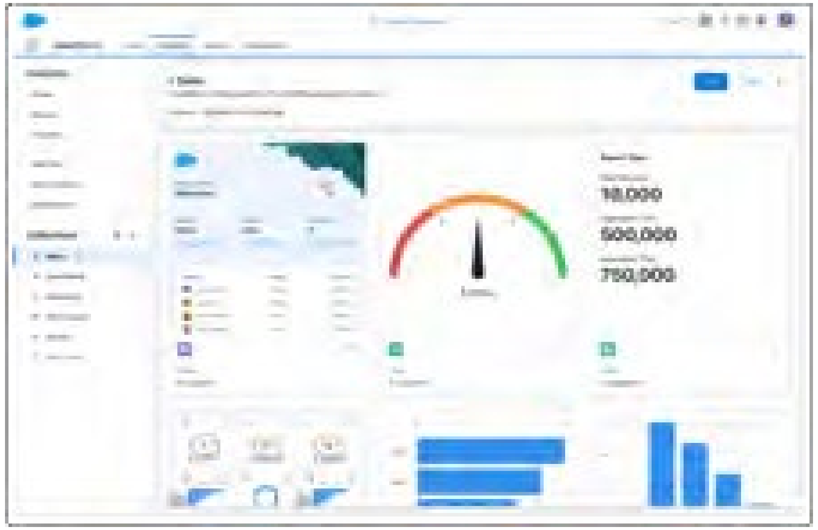
Lightning Reports & Dashboards

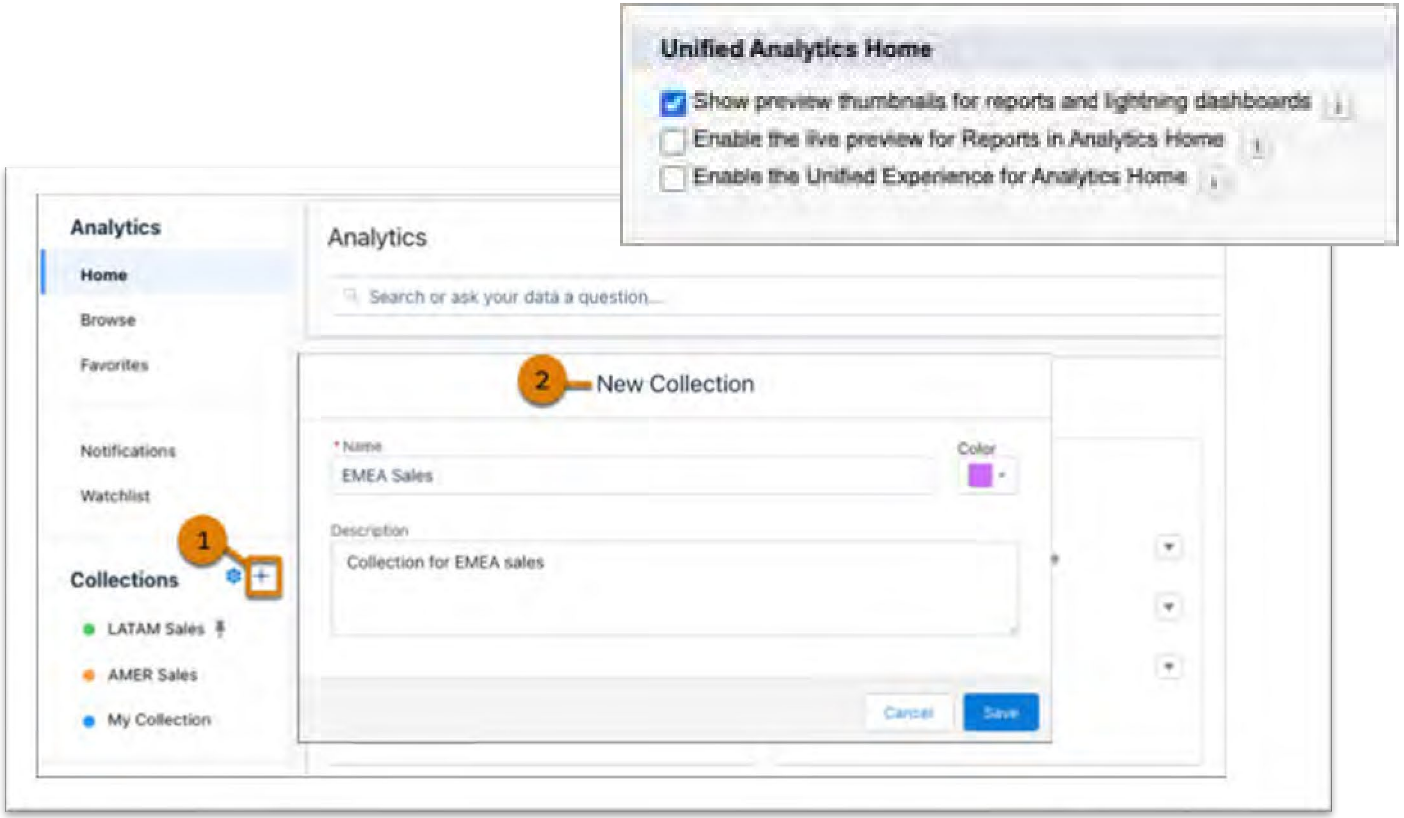
- Filter report types by **objects** & **fields**



Lightning Reports & Dashboards

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





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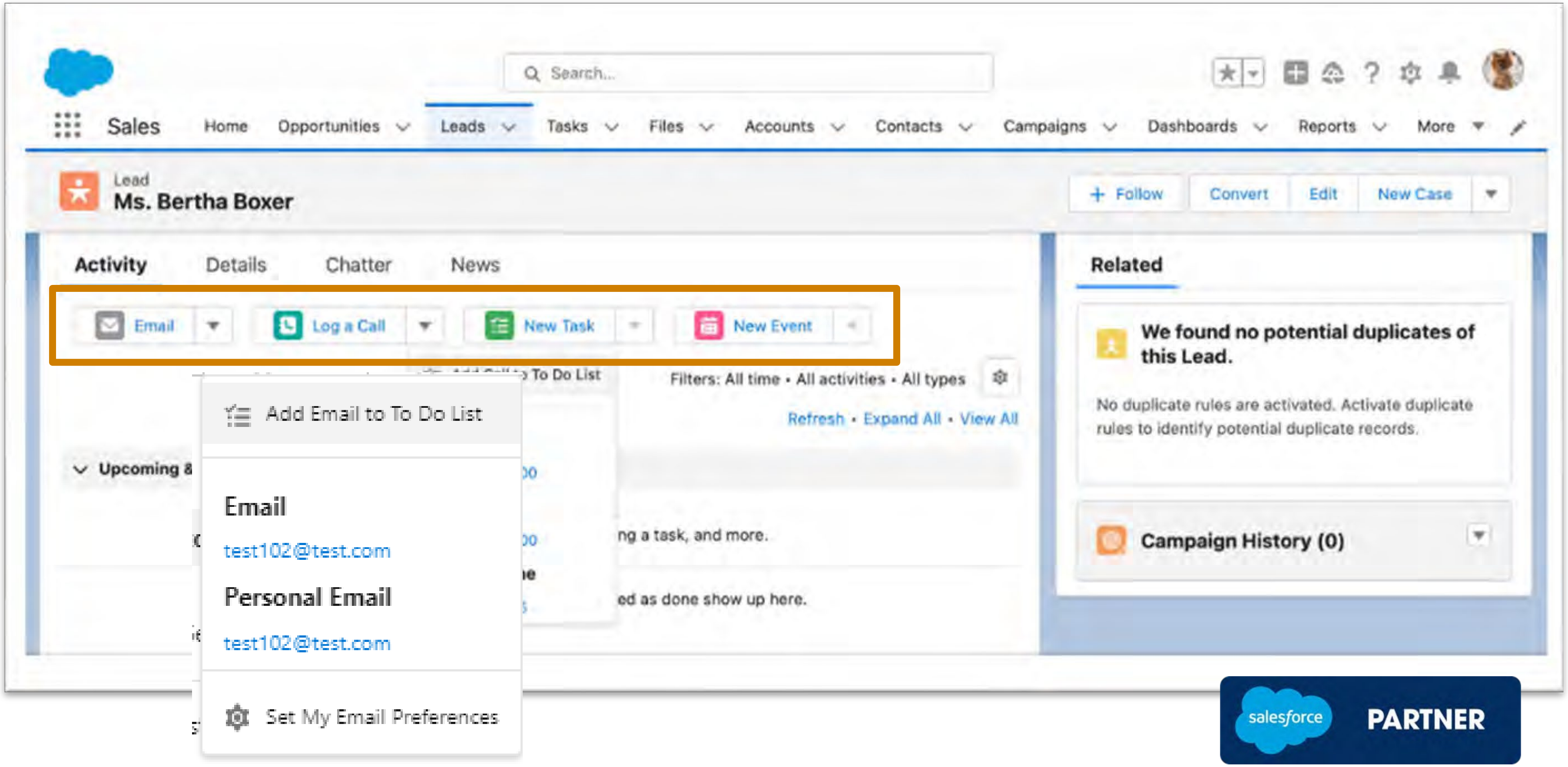
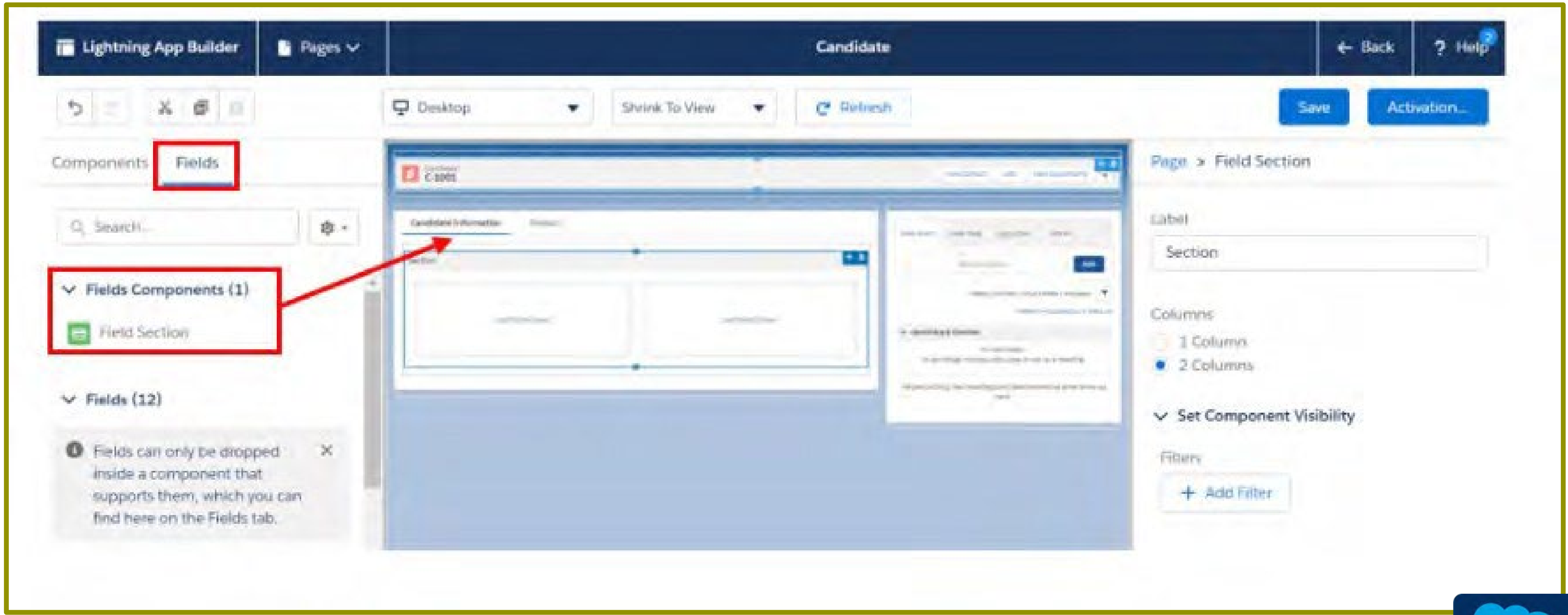
Dynamic Activity Composer

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



Dynamic Forms now for Leads and Cases



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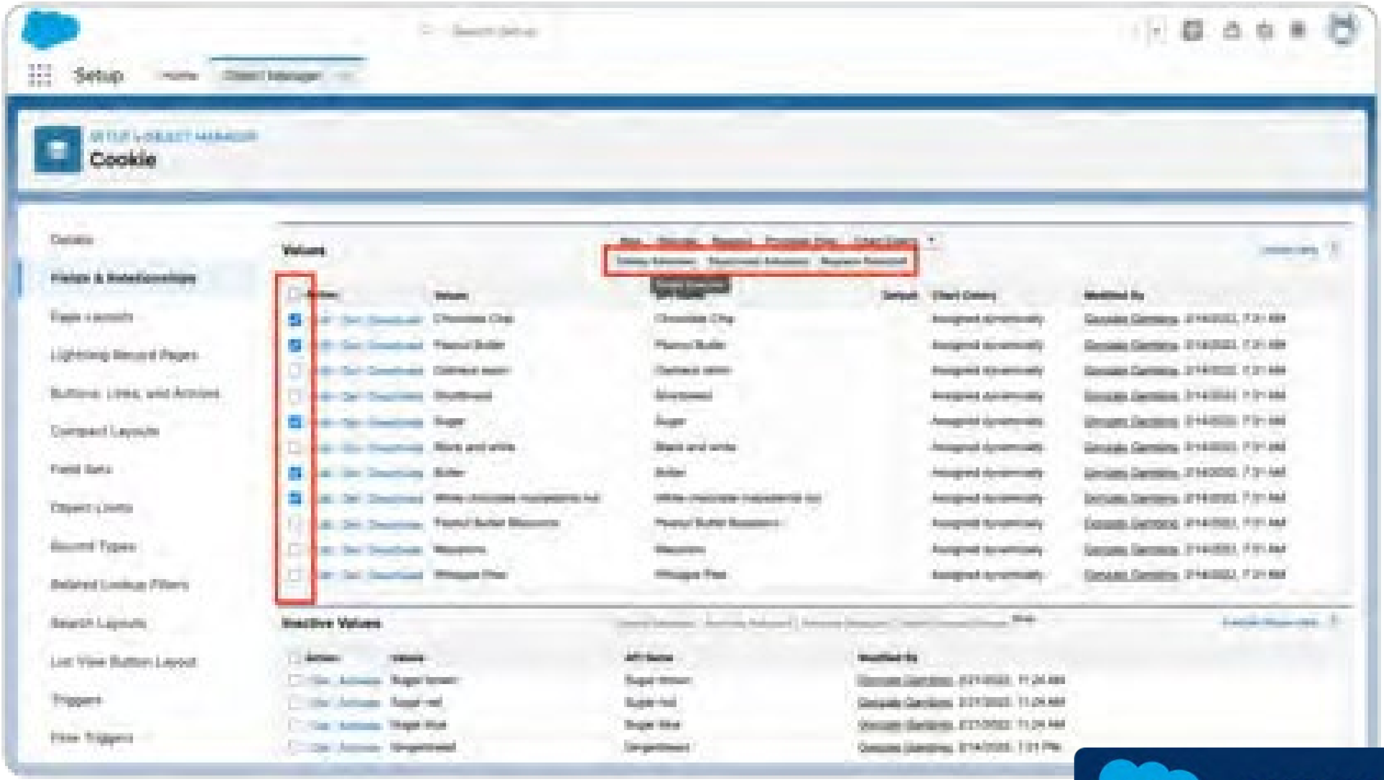
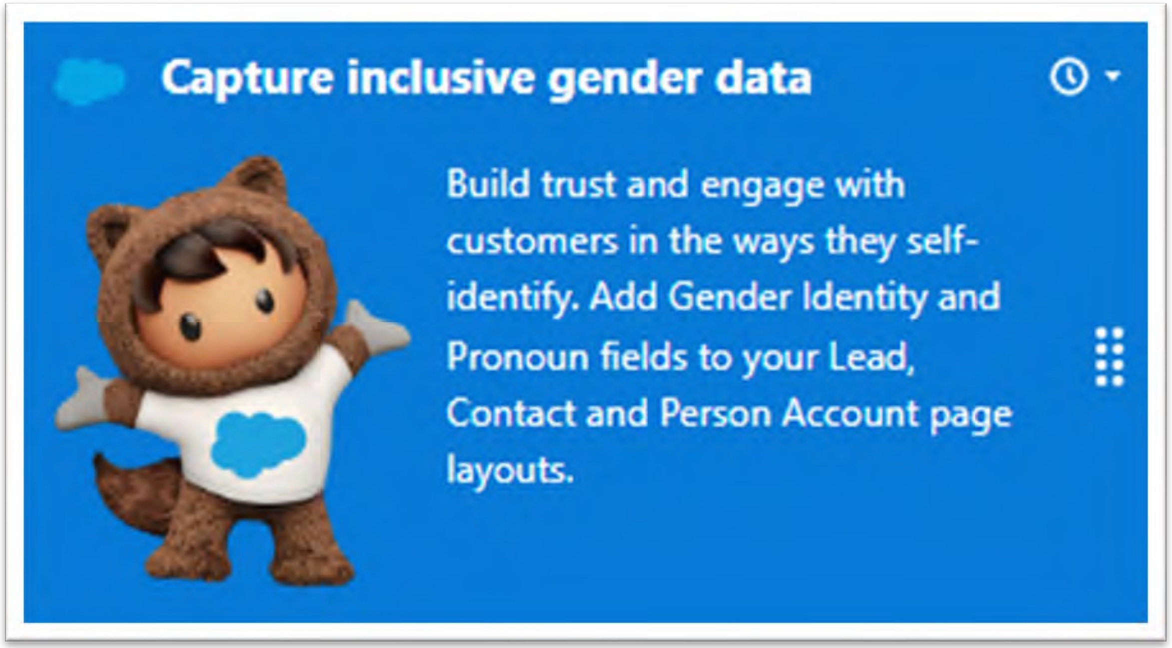
Bulk Manage Picklist Values

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



Gender Identity & Pronouns Fields

- Capture inclusive data with gender identity and pronoun fields



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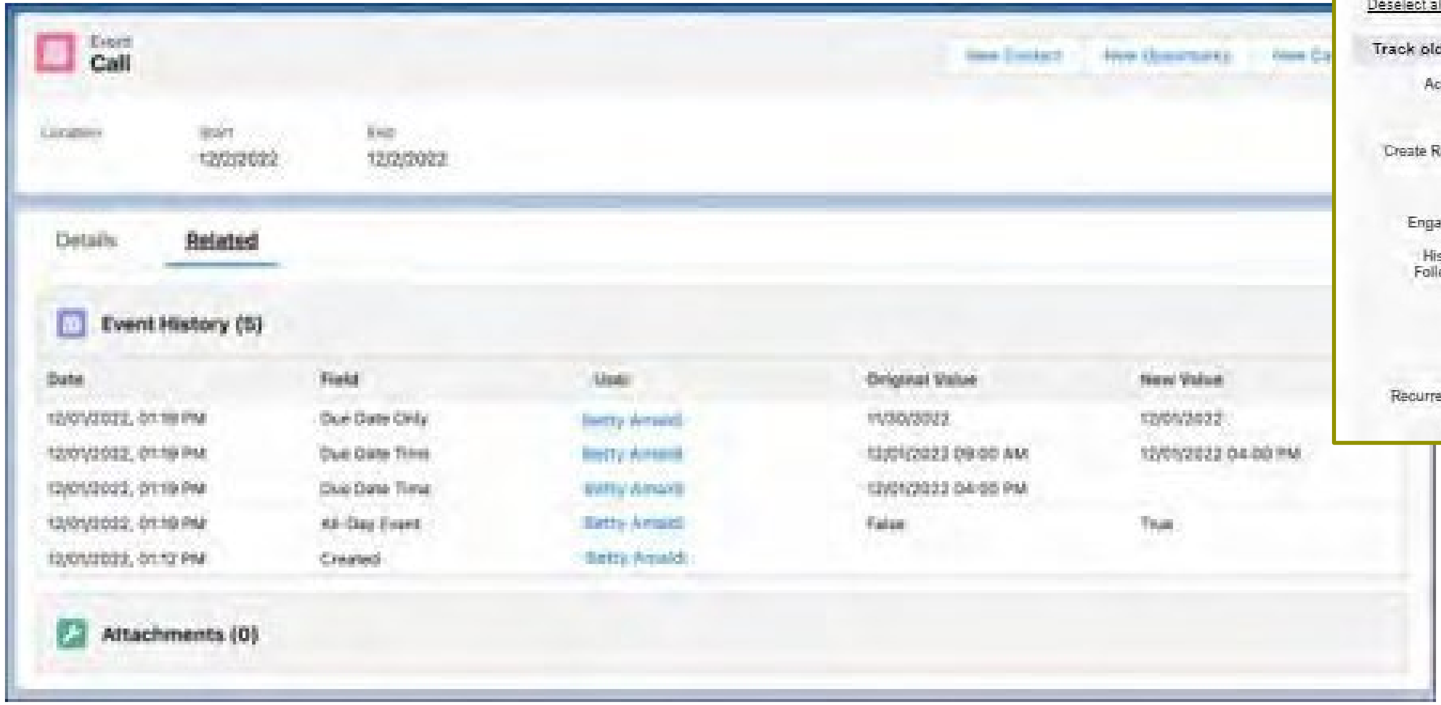
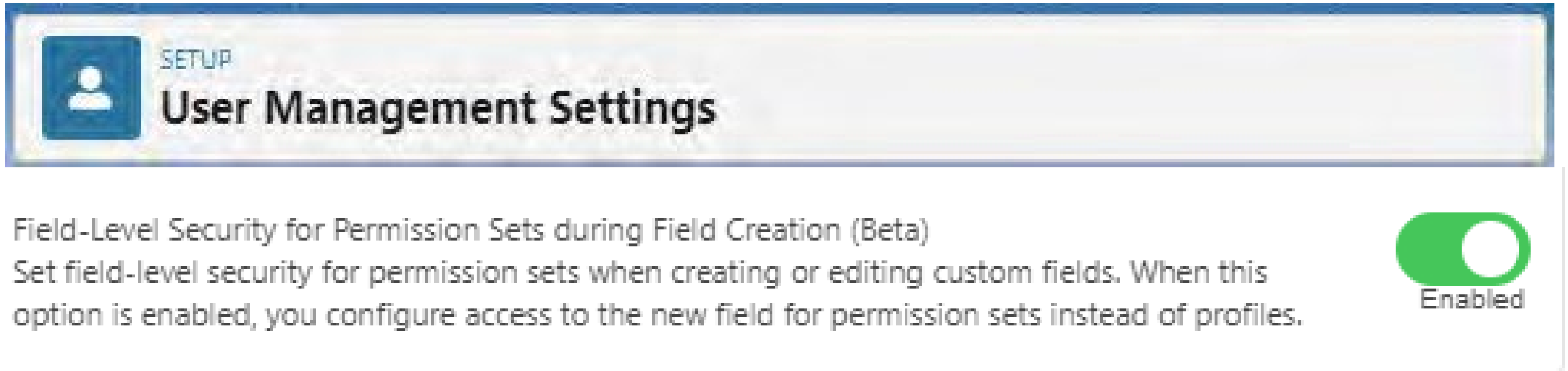
Field History Tracking on Events and Tasks



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

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



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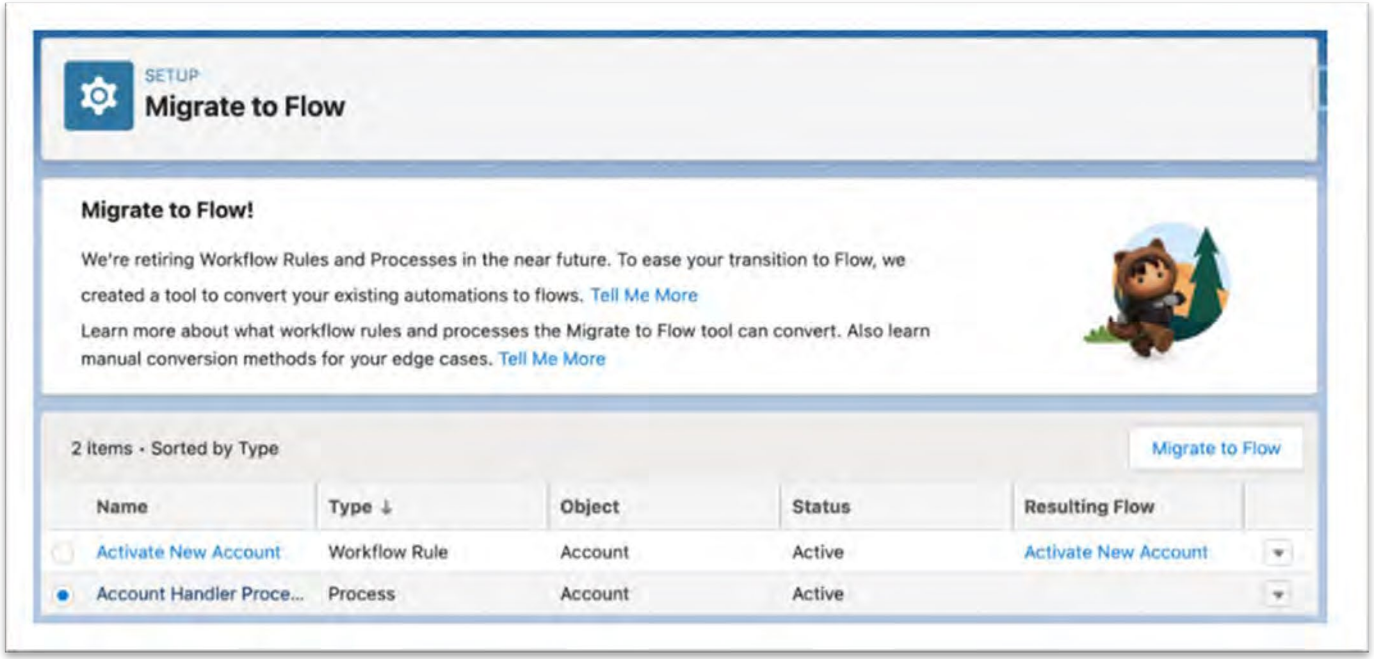
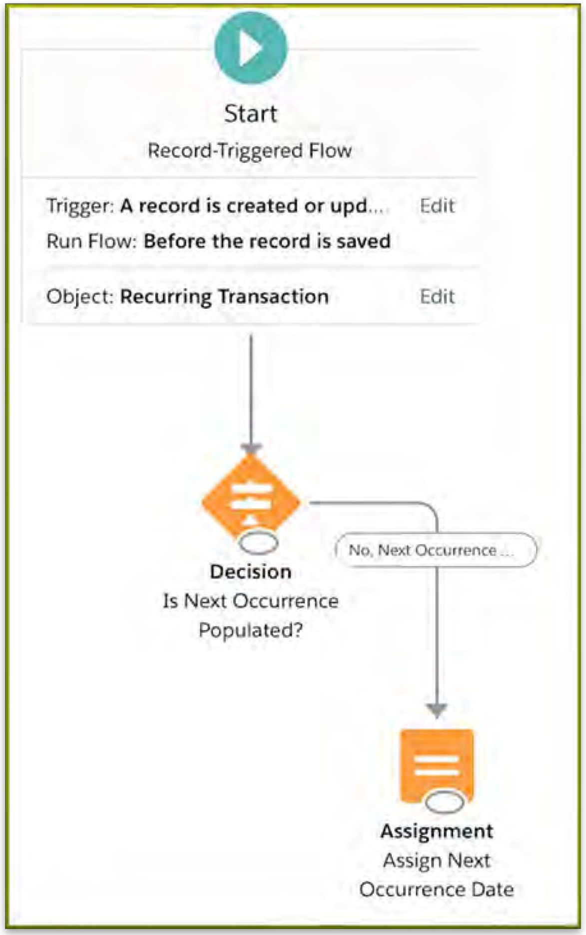
Set Field Level Security for Permission Sets During Field Creation

- Set Permissions at field creation

Upgraded Migrate to Flow Tool

- Workflow and Process Builder to retire soon





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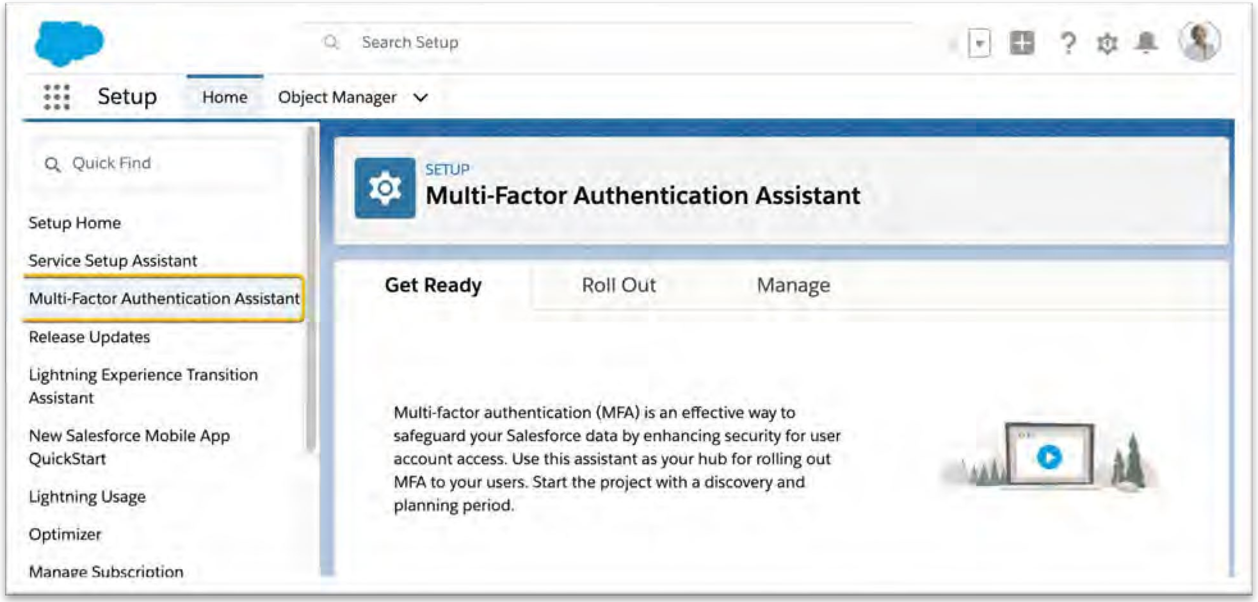
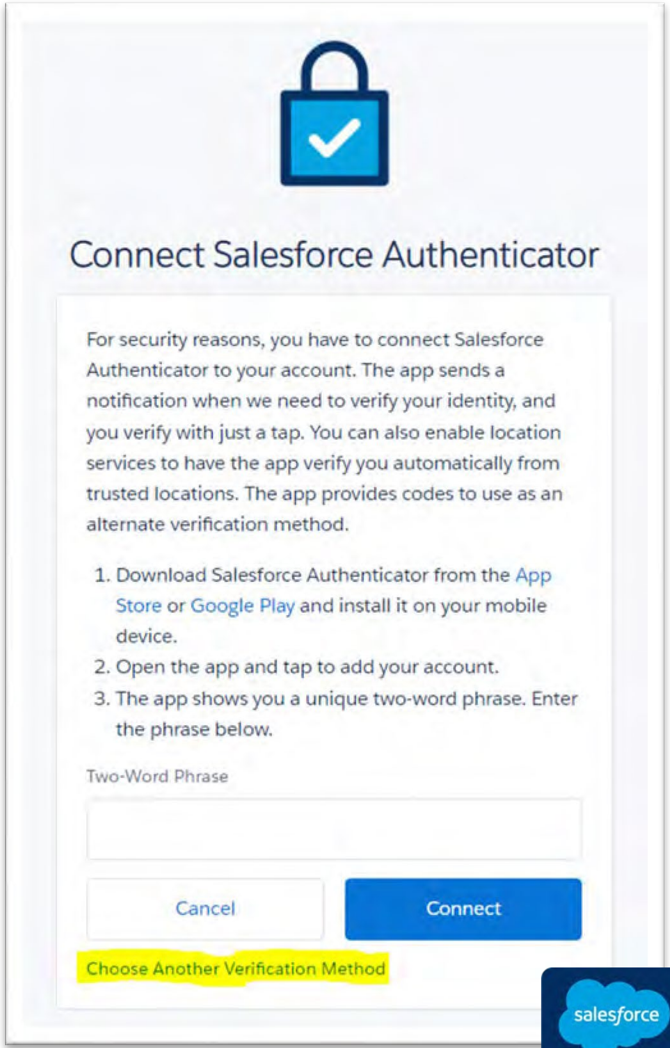
MFA Auto-Enablement is here!

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





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#2

Polling Question

#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!

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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.

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Thank You
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THANK YOU

Additional Questions?

Reach out to us at

Experts@armanino.com

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