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Latest Updates in the Salesforce 2023 Summer Release

Nonprofit

MEET

Our Presenters

Mark Forman

Senior Consultant,
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

- 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)

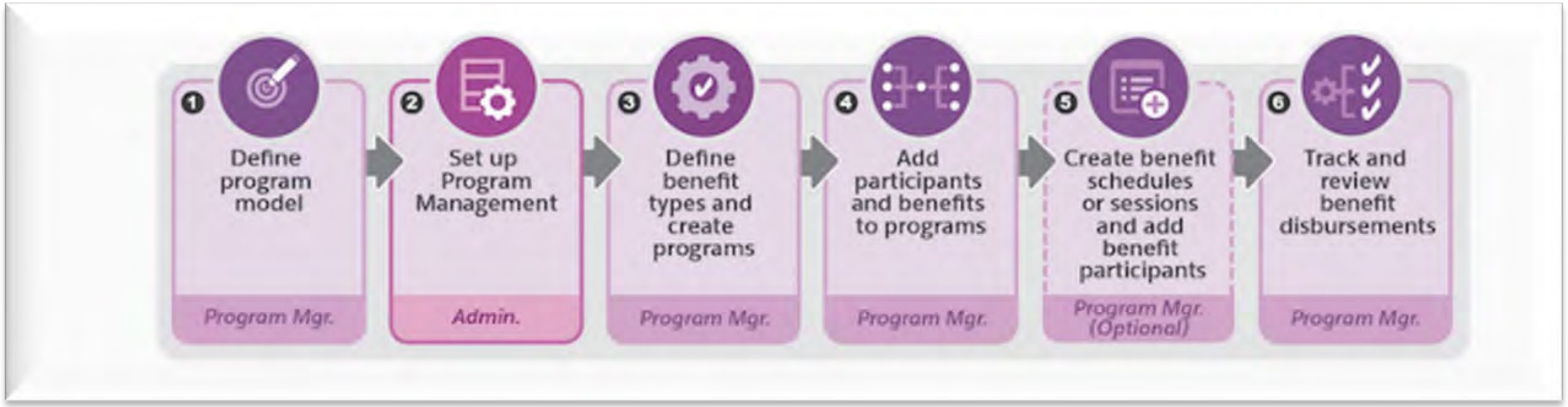
Dynamic Assessments

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

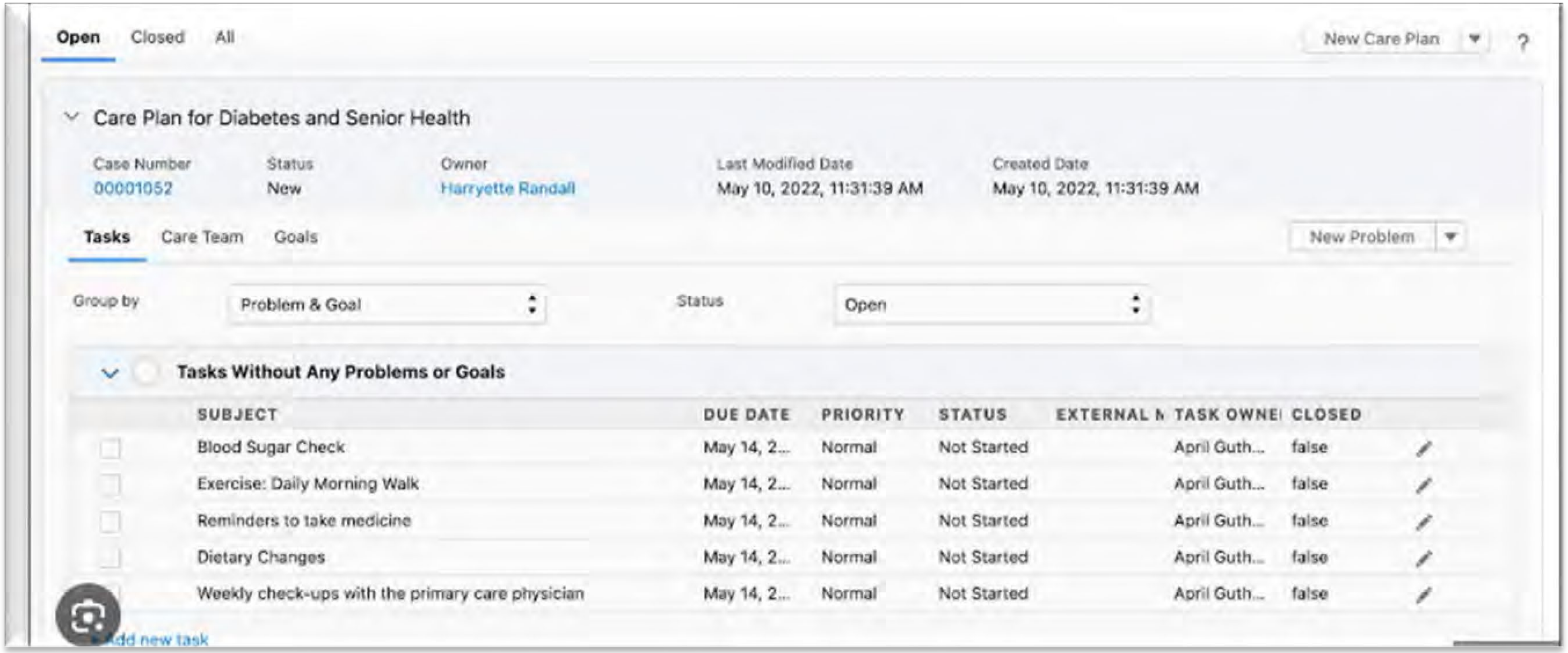


A benefit session is an instance or occurrence within a benefit schedule. A schedule can have one or more benefit sessions based on the benefit selected. You can add participants to all benefit sessions in a schedule or to selected sessions.

The benefit schedule page is based on OmniScript.

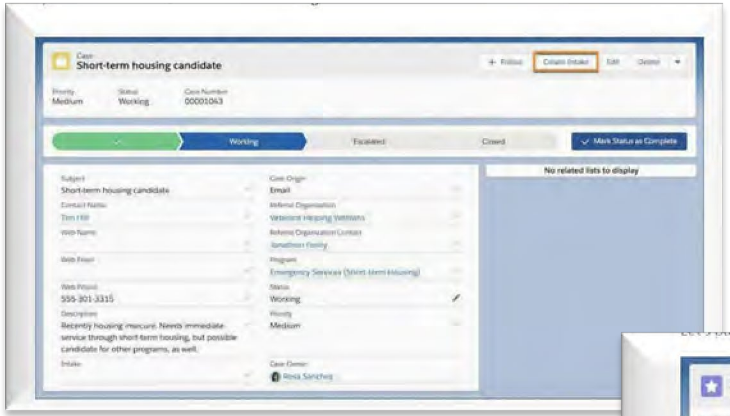
[Link to Salesforce Release Notes]

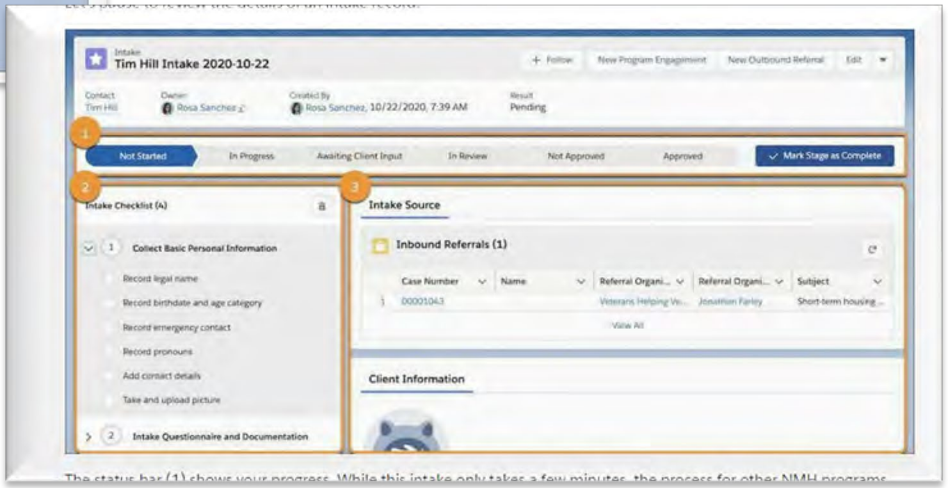
Care Plan Templates and Summary View

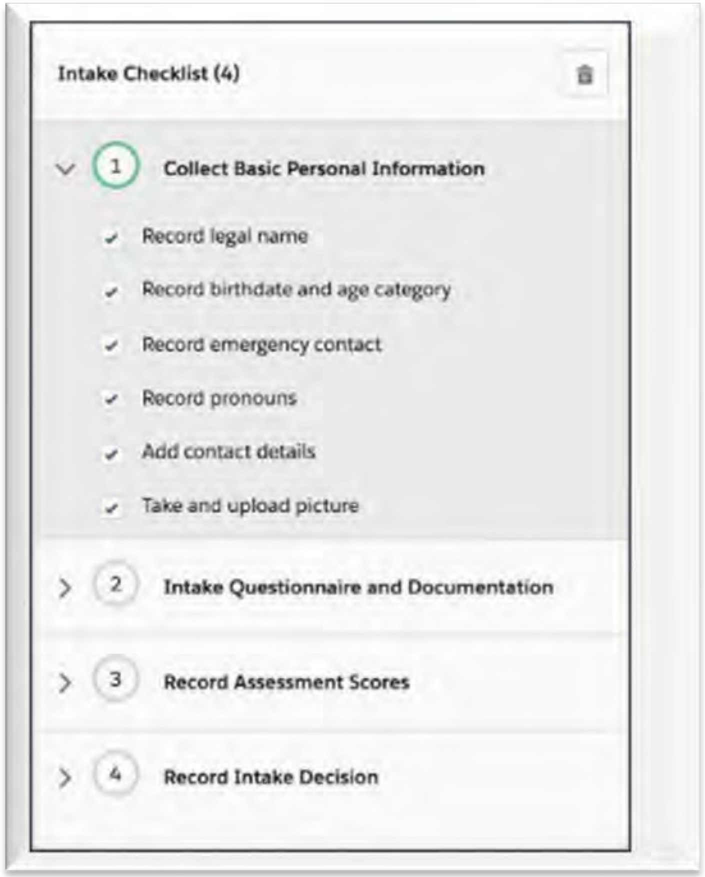


[Link to Salesforce Release Notes]

Referral Intake Guided Flow (Prebuilt Components)







[Link to Salesforce Release Notes]

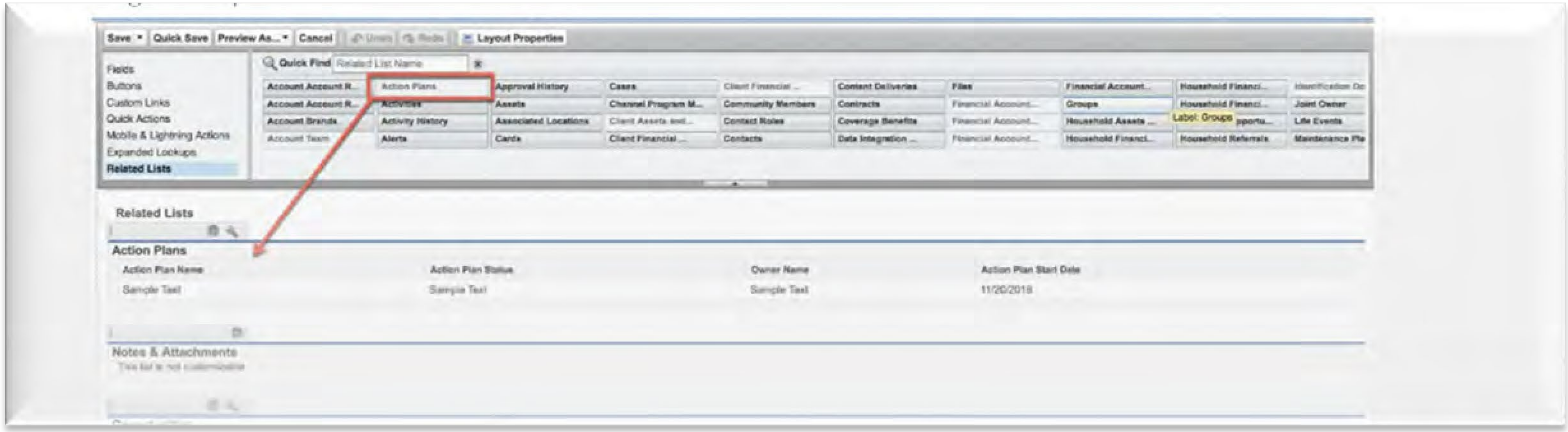
Party Relationship Groups

- 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

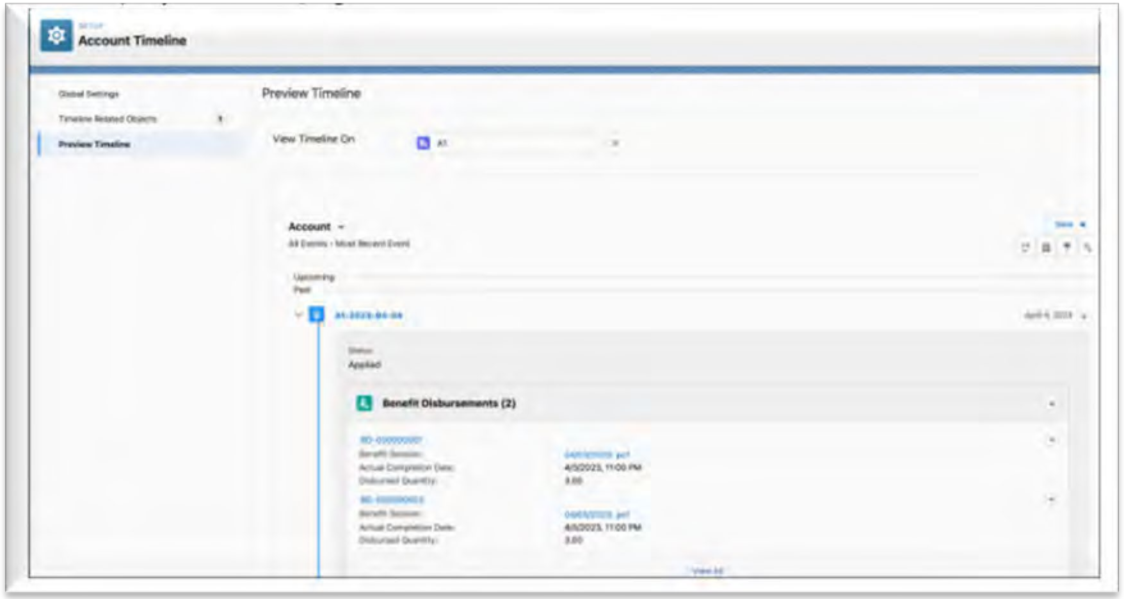
Field Permissions

Field Name	Read Access	Edit Access
Approval Status	☐	☐
Created By	☑	
Department	☐	☐
Education	☐	☐
Hiring Manager	☐	☐
Job Description	☐	☐
Last Modified By	☑	
Legacy Position Number	☐	☐
Location	☐	☐
Operating Systems	☐	☐
Owner	☑	☑
Pay Grade	☐	☐
Programming Languages	☐	☐
Record Type	☑	☑
Related Position	☐	☐

- 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)

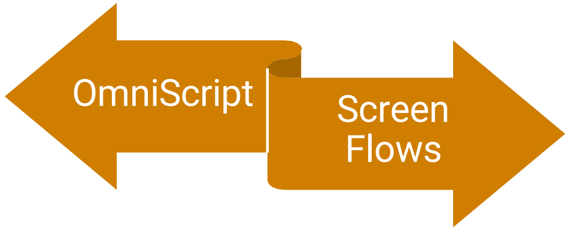


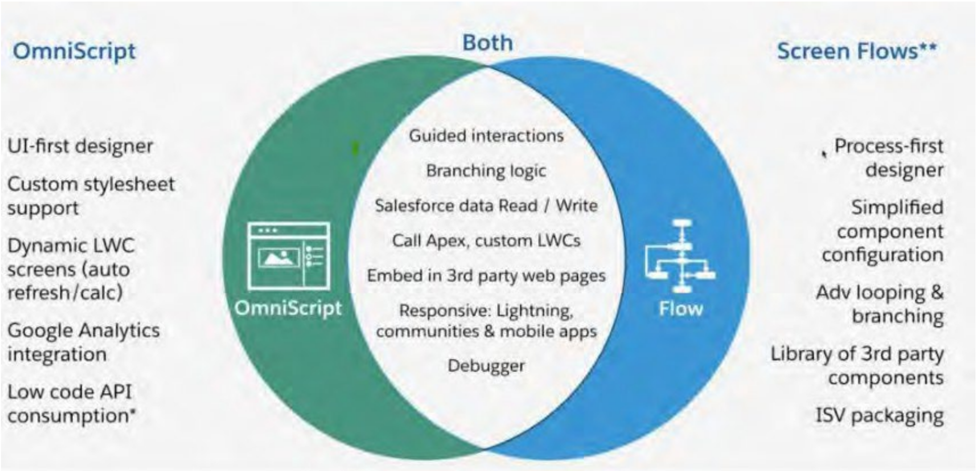
- Comprehensive View
- Improved Constituent Management
- Efficient Follow-up
- Collaboration and Visibility
- Historical Analysis
- Customization

[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!


Thank You
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Trail blazer
Trail blazer

Additional Questions?

Reach out to us at

Experts@armanino.com

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