

July 6, 2023

# 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



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

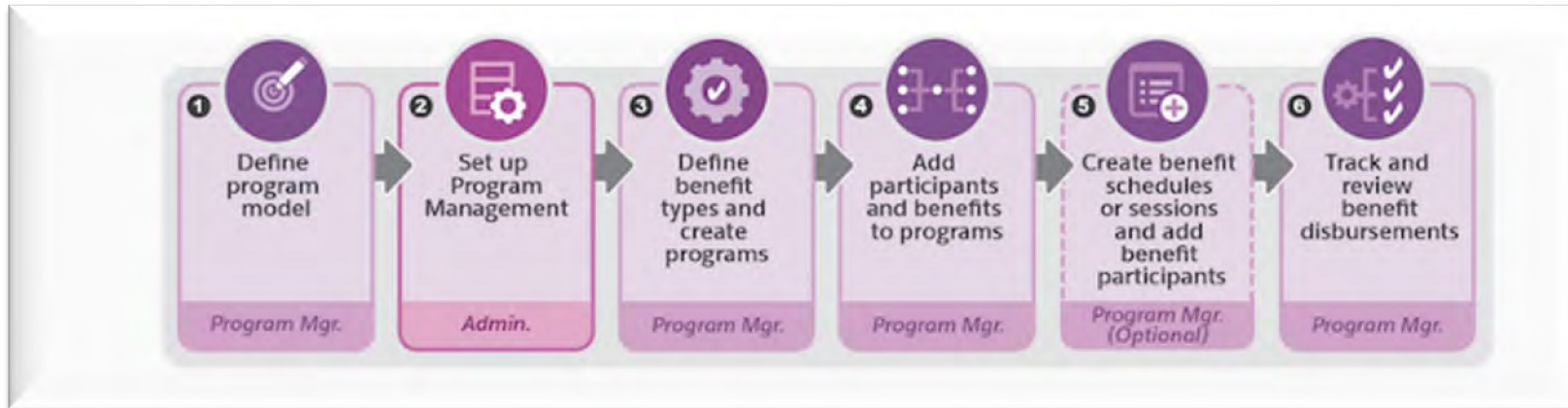
**Dynamic Assessments:** A new, enhanced guided flow allows users to easily fill out assessments, while questions in the assessment form update dynamically based on answers to previous questions in the form. Users can then quickly upload appropriate files within the context of the assessment.

[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

OpenClosedAll

New Care Plan?

Care Plan for Diabetes and Senior Health

Case Number

Status

Owner

Last Modified Date

Created Date

00001052

New

Harryette Randall

May 10, 2022, 11:31:39 AM

May 10, 2022, 11:31:39 AM

Tasks

Care Team

Goals

New Problem?

Group by

Problem & Goal

Status

Open

Tasks Without Any Problems or Goals

	SUBJECT	DUE DATE	PRIORITY	STATUS	EXTERNAL N TASK OWNEI	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	

Add new task

[Link to Salesforce Release Notes](#)



# Referral Intake Guided Flow (Prebuilt Components)

This screenshot shows a Salesforce case record for a 'Short-term housing candidate'. The case is in the 'Working' stage. The left sidebar contains fields for Subject, Contact Name, Email, and Program. The main content area shows a list of related records, including 'Emergency Services (Short-term housing)' and 'Housing'.

This screenshot shows a Salesforce intake record for 'Tim Hill Intake 2020-10-22'. The intake is in the 'Not Started' stage. The left sidebar contains a checklist with four items: 'Collect Basic Personal Information', 'Intake Questionnaire and Documentation', 'Record Assessment Scores', and 'Record Intake Decision'. The main content area shows a table of 'Inbound Referrals' with columns for Case Number, Name, Referral Organization, and Subject.

This screenshot shows an 'Intake Checklist (4)' with four steps:

- 1 Collect Basic Personal Information**
  - Record legal name
  - Record birthdate and age category
  - Record emergency contact
  - Record pronouns
  - Add contact details
  - Take and upload picture
- 2 Intake Questionnaire and Documentation**
- 3 Record Assessment Scores**
- 4 Record Intake Decision**

[Link to Salesforce Release Notes](#)



# Party Relationship Groups

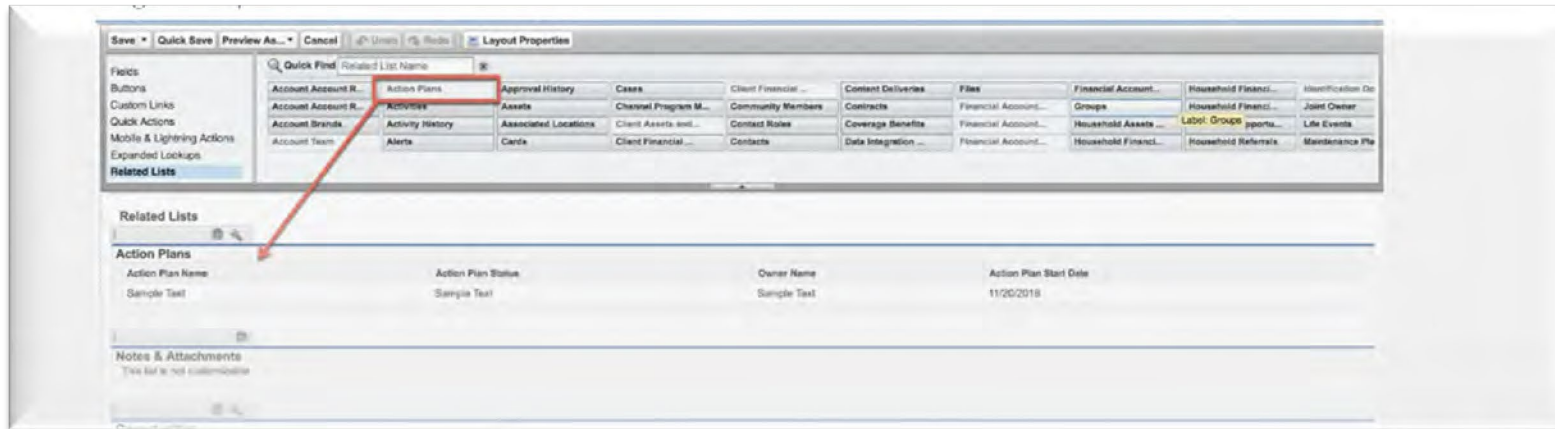
- Enable party relationship groups
- Turn on contacts to multiple accounts
- Add the related contacts related list to the account page layout
- Create values for party relationship group fields (picklist values for category and sub-category)
- Create a party relationship group
- Add members to a party 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

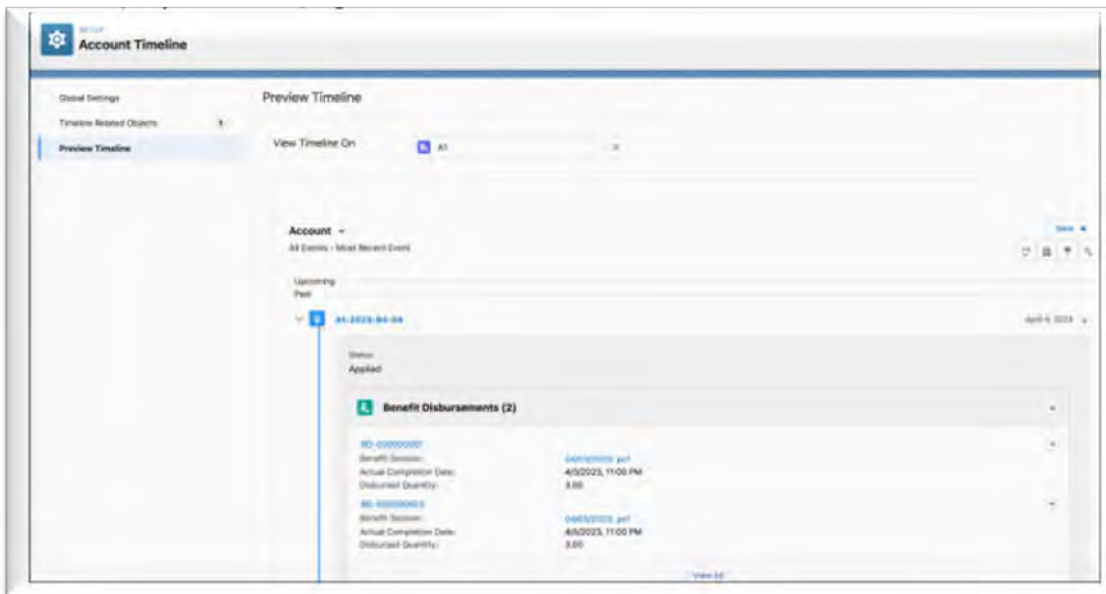
Field Permissions		
Field Name	Read Access	Edit Access
Approval Status	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department	<input type="checkbox"/>	<input type="checkbox"/>
Education	<input type="checkbox"/>	<input type="checkbox"/>
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

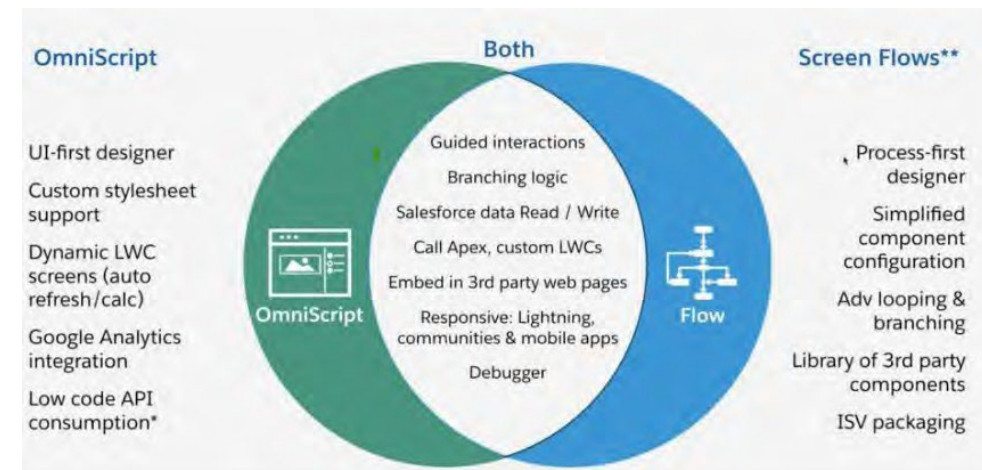
[Link to Salesforce Release Notes](#)





# 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](mailto:Experts@armanino.com)



# Armanino Operates in an Alternative Practice Structure:

“Armanino” is the brand name under which Armanino LLP, Armanino CPA LLP, and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.