

October 11, 2023

Latest Updates in the Salesforce 2024 Winter Release for Nonprofits



MEET

Our Presenters



James Moore

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Armanino Advisory LLC
Industry Experience: 10 years

KNOWLEDGE

Learning Objectives



See an overview of the recent release features and updates



Learn about enhancements that can streamline your processes

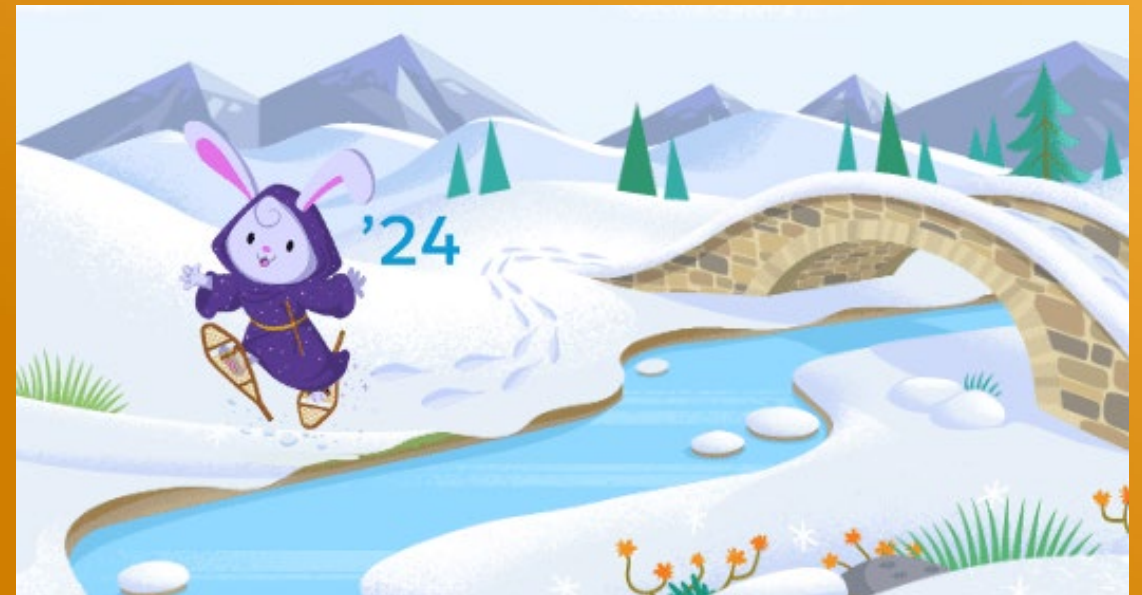


Understand how to manage the latest release to improve productivity

Exploring New Areas

Agenda – Nonprofit Focused

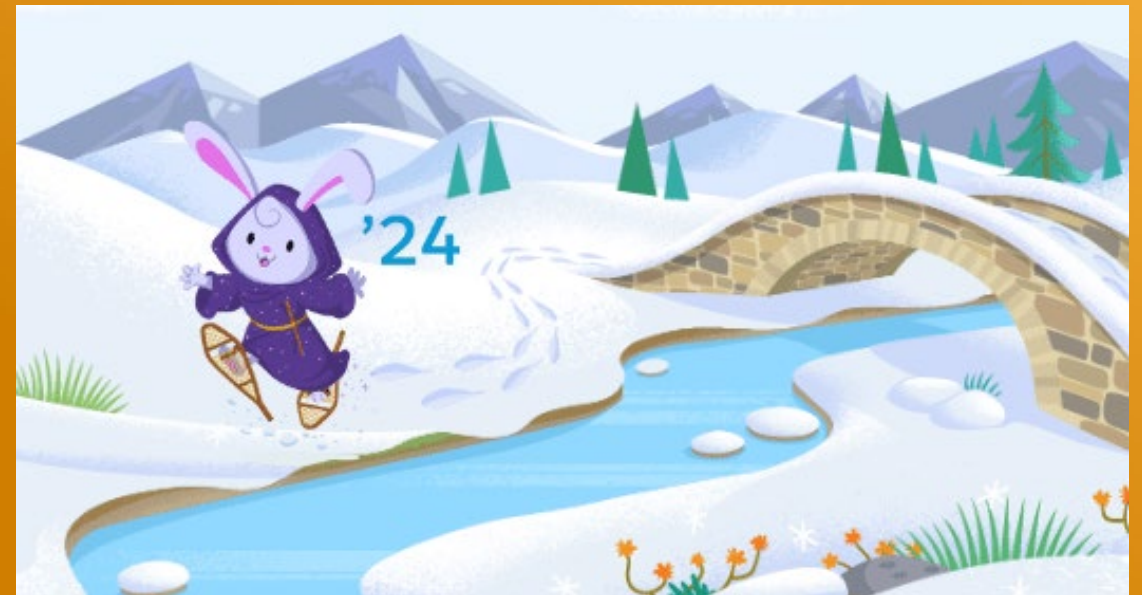
- Nonprofit Cloud
- Donor Profile and Management
- Fundraising and Gift Management
- Real-Time Analytics on Fundraising



Exploring New Areas

Agenda – User Focused

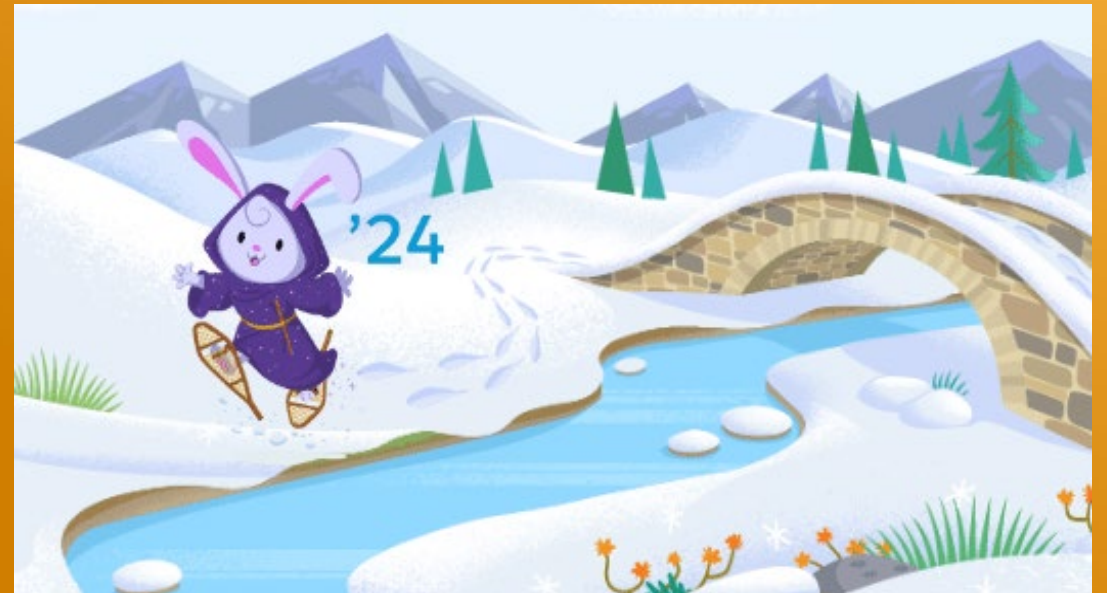
- Display Only Salesforce Events on Calendar
- Personalize Sales Emails with Einstein GPT for Sales
- Transfer Dashboard Ownership
- Report on Members of a Public Group and Queue
- Asset Hierarchy



Exploring New Areas

Agenda – Admin Focused

- Migrate to Hyperforce with Hyperforce Assistant
- Permission Set Summary View
- Report on Permission Set Assignment
- Dynamic Forms (GA)
- API Names in Permission Sets
- Salesforce Backup and Restore



More Salesforce Nonprofit Focused



Donor Profile

- Create a timeline of your relationship with donors, manage wealth and giving information, and add customized alerts to their profile so you can know when important events are occurring in real time
- Fundraisers can manage their relationships with individual donors with all information in one place
- Help increase donor retention





Fundraiser Portfolio Management

- **Create, manage and assign** ownership of portfolios to Fundraisers
 - Utilize portfolios to view tasks and manage your donor relationships from a single view
- **Manage and maintain** high touch relationships with donors while ensuring no tasks go unfinished
- **Increase** in Dollars Raised

The screenshot displays the 'Campaign Touching Base' interface. At the top, the campaign name is circled in red. Below it, a table shows the campaign details:

Type	Status	Start Date	End Date
Email	Planned	9/7/2020	10/5/2020

Below the table, there are tabs for 'Related' and 'Details'. The 'Related' section includes:

- Campaign Hierarchy (0)**
- Attachments (0)** with an 'Upload Files' button.
- Opportunities (0)** with a 'New' button.
- Campaign Members** with 'Add Leads' and 'Add Contacts' buttons. The 'Add Contacts' button is circled in red.



Campaign Creation

- Organize and track the organizations outreach efforts and donor solicitations
- Increase visibility into outreach performance
- Increased granularity





New Campaign

Campaign Information

Campaign Owner
Whitney George

* Campaign Name
Touching Base

Active
 

Type
Email 

Status
Planned

Start Date
9/7/2020

End Date
9/10/2020

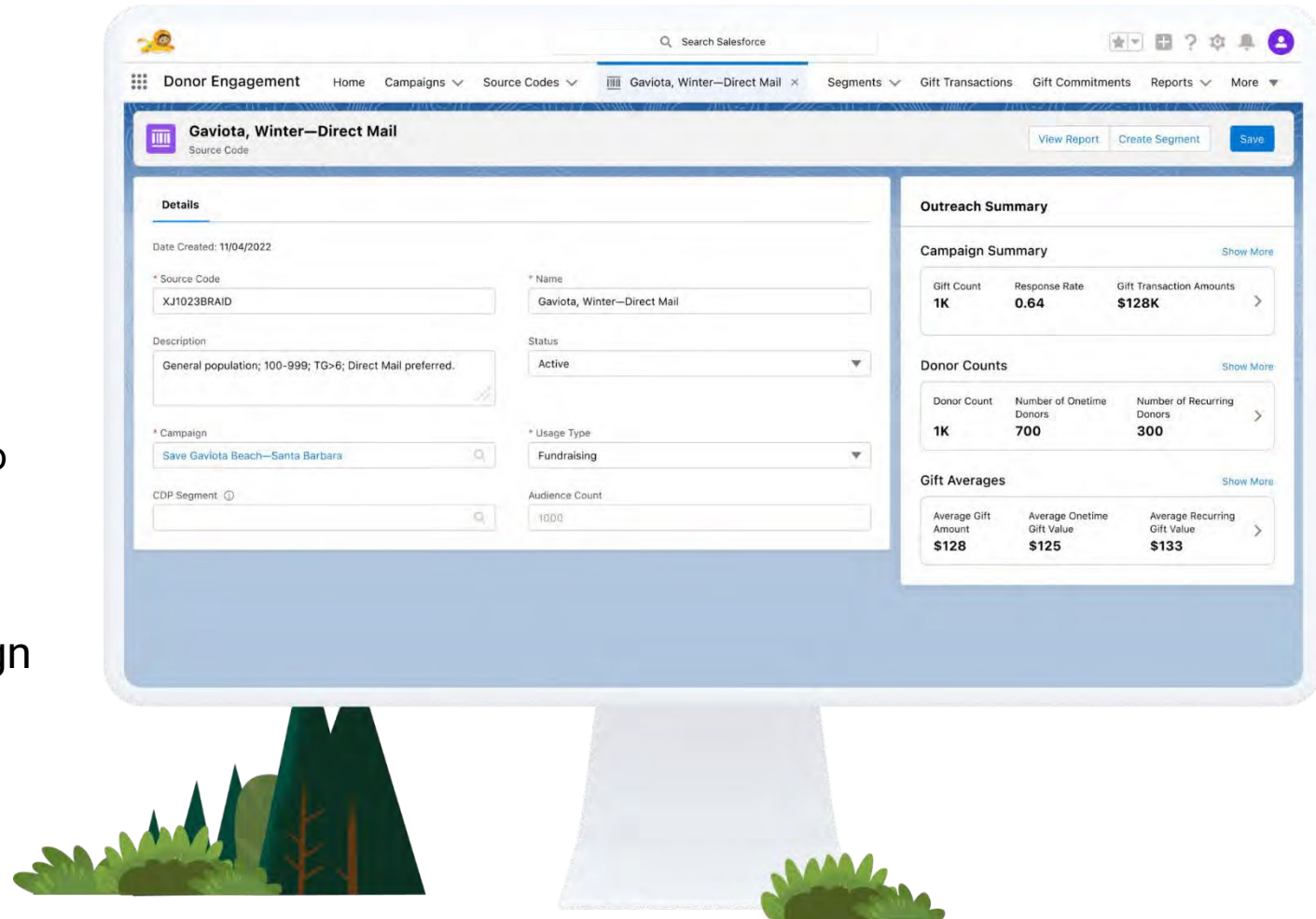
Expected Revenue in Campaign

Cancel Save & New Save



Source Codes

- Add one or many **source codes** to a campaign to track the specific messages, segments and channels within a campaign
 - Assign a **focus segment and audience count** to each Source Code to track ROI
- **Track and measure** the performance of individual outreach efforts within a Campaign to understand performance and track ROI
- **Increase** outreach performance
- More granular **appeal tracking**



The screenshot displays the Salesforce Donor Engagement interface for a source code named 'Gaviota, Winter—Direct Mail'. The interface is divided into several sections:

- Details:**
 - Date Created: 11/04/2022
 - * Source Code: XJ1023BRAID
 - * Name: Gaviota, Winter—Direct Mail
 - Description: General population; 100-999; TG>6; Direct Mail preferred.
 - Status: Active
 - * Campaign: Save Gaviota Beach—Santa Barbara
 - * Usage Type: Fundraising
 - CDP Segment: (empty)
 - Audience Count: 1000
- Outreach Summary:**
 - Campaign Summary:**

Gift Count	Response Rate	Gift Transaction Amounts
1K	0.64	\$128K
 - Donor Counts:**

Donor Count	Number of Onetime Donors	Number of Recurring Donors
1K	700	300
 - Gift Averages:**

Average Gift Amount	Average Onetime Gift Value	Average Recurring Gift Value
\$128	\$125	\$133



Fundraising Roll Ups

- View fundraising summary data on record homepage via a customizable component
- Provide industry standard rollup information for donor, household, gift designation and campaign/source codes to help guide donor stewardship and track outreach performance
- Real time view of fundraising transaction performance

ACCOUNT
Pyramid Construction Inc.

+ Follow Edit New

Account Number CC213425	Industry Construction	Sum of Opportunities \$350,000.00	Phone (014) 4
----------------------------	--------------------------	--------------------------------------	------------------

RELATED DETAILS NEWS

Opportunities (2)

Pyramid Solar Generators	
Stage:	Value Proposition
Amount:	\$250,000.00
Close Date:	6/22/2017
Pyramid Emergency Generators	
Stage:	Closed Won
Amount:	\$100,000.00
Close Date:	4/11/2015

New

View All



Gift Commitment Management

- Create a Gift Commitment, associate Schedules and monitor its Transactions
 - Upgrade/downgrade, update payment method, update dates or pause/resume the Commitment payment using the shipped Actions
 - Monitor the auto-update of Commitment Status
- Tracking fulfilment of complex gifts to be paid in instalments, tracking their status and payment schedule, and performing support operations such as upgrades/downgrades and pauses
- Increase in Dollars Raised



Gift Allocations

- Leverage the **Gift Default Designation** and **Gift Transaction Designation** records for allocation
- **Allocating a gift** among one or more Designations, and updating the Designation balances when transactions are paid
- **Better management** of distribution of funds
- **Better planning** of Fund targets for different programs/purposes
- **Accurate** reconciliation with Finance



Candace Evans \$100 Donation 11/05/2018

GAU Allocations (2) [Manage Allocations](#)

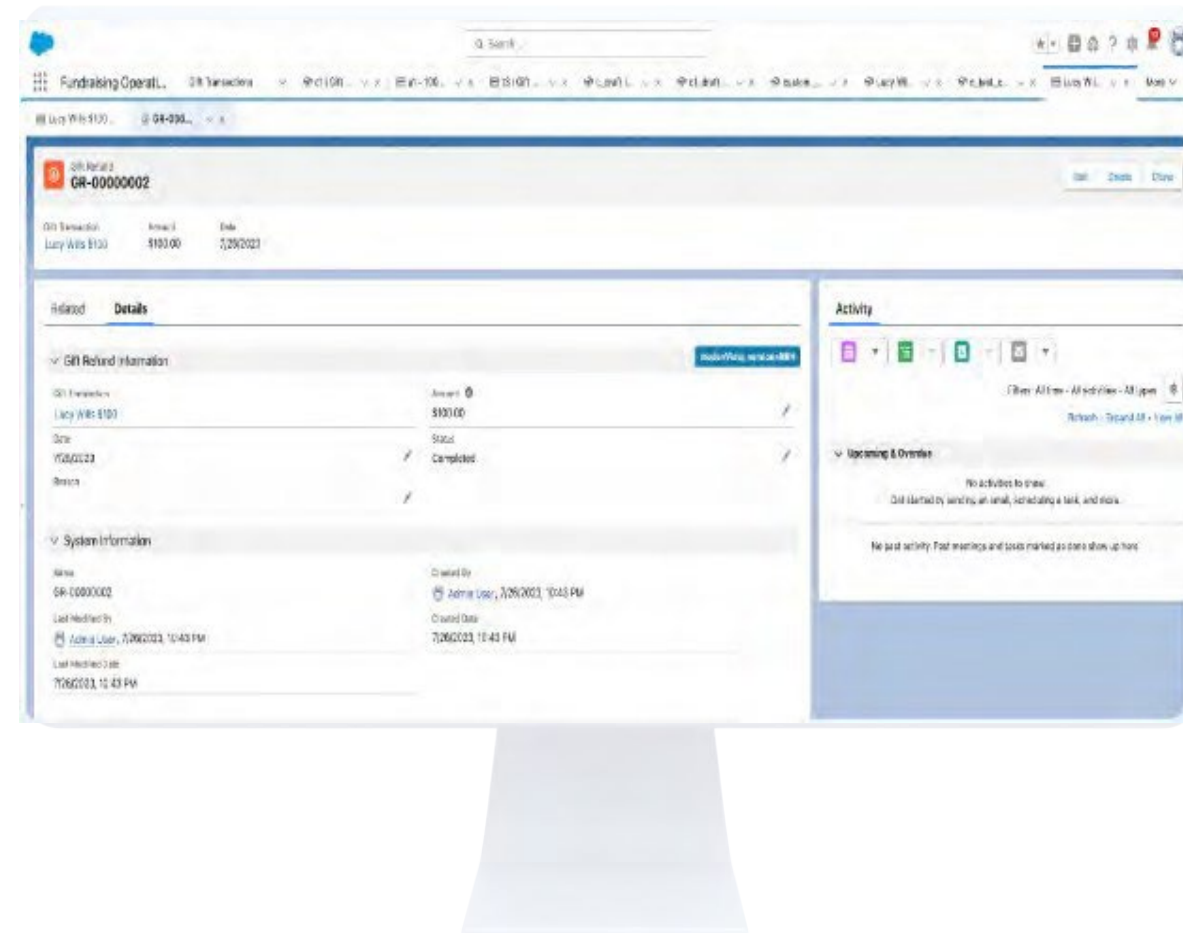
GAU ALLOC...	GENERAL ACC...	AMOUNT	PERCENT
ALL-62	Women's Services	\$50.00	50.000000% <input type="button" value="v"/>
ALL-63	Transitional Hou...	\$50.00	50.000000% <input type="button" value="v"/>

[View All](#)



Refund Support

- Use the Gift Refund object to specify refund information, track refund status and track the refunded amount at the Gift Transaction
- Partial or full refunding of a gift transaction and updating of designation balances when the refunded amount is withdrawn
- Increased donor retention due to efficient refunds when requested






Gift Entry

- Create a batch and enter many gifts quickly
 - Our automation will do the work of auto-populating commitment, campaign, designation and more
 - Then, verify that the entered information matches the estimated information and process the batch
 - Or create a single gift entry
- Every day, nonprofits hand-enter gifts
 - With Gift Entry, users can do it as quickly and accurately as possible

Gift Entry
New Batch New Single Gift

Batches Templates

 **Batches**
⚙️ +

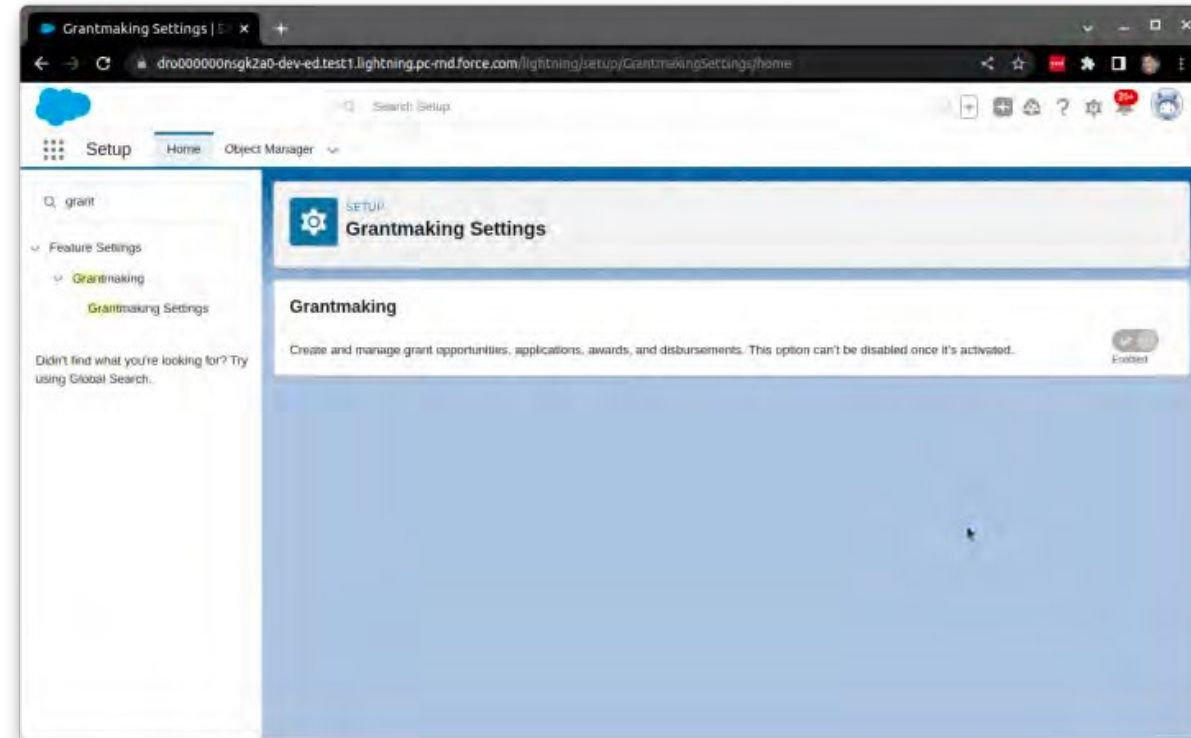
8 items • Sorted By Batch Name • Updated a few seconds ago

Batch Name ↑	Form Template ↓	Expected Count of Gifts ↓	Expected Total Batch Amount ↓
Annual Appeal	Default Gift Entry Template	20	\$1,500.00
Gala Individual Donations via Check	Individual Donations - Credit Cards	145	\$10,500.00
Grant Payments via Check	Corporate Donations - Checks	23	\$55,000.00
Individual Donations via Check	Individual Donations - Checks	164	\$3,295.00
Old BGE Batch 1		63	\$7,495.00
Old BGE Batch 2		54	\$9,635.00
Old BGE Batch 3		27	\$4,539.00
Organization Sponsorships via Cré...	Corporate Donations - Credit Cards	75	\$25,000.00



Data Model Additions

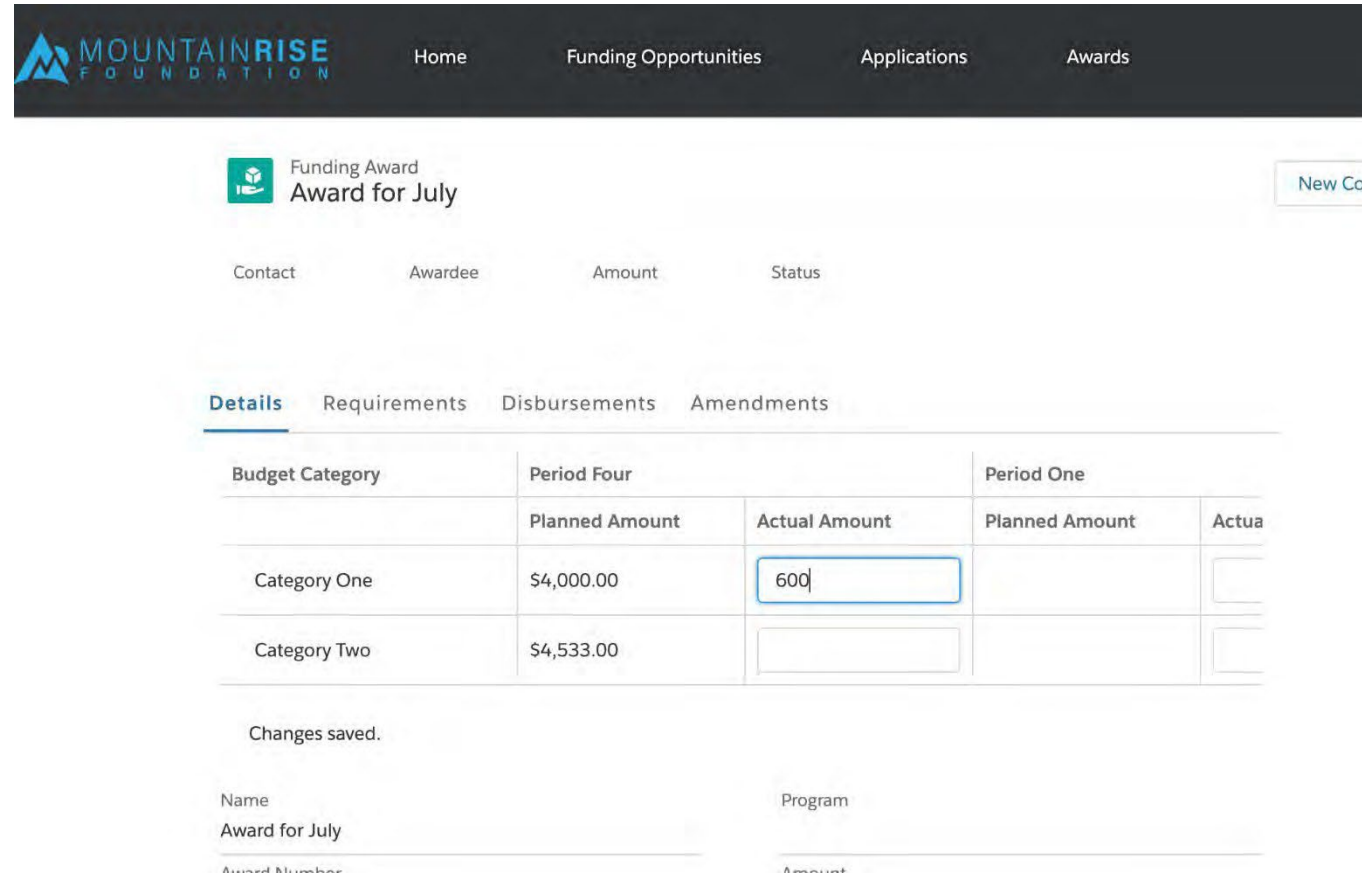
- Relate multiple levels of programs and funding opportunities
- Track grant award and amendment contract details
- Track Program and Funding Opportunity hierarchies
 - Add hierarchy with the Parent Program field on Programs and the Parent Funding Opportunity field on Funding Opportunities
- Link funding awards and funding award amendments to contracts with the Contract field
- Use Compliant Data Sharing with Grantmaking records
- Turn on Compliant Data Sharing for Grantmaking objects: Budget Participant, Funding Award Participant, and Individual Application Participant





UI for Budget Actuals

- Grantees need to **update budget details**, submit actuals and provide explanations of variations
- Drag the **“Budget” component** onto Lightning record page
- Allow grantees to make **post-award updates to budgets** and submit actuals against plan
 - Allow grant makers to see updates in real time
- Structured entry and management of **proposed and actual budgets**



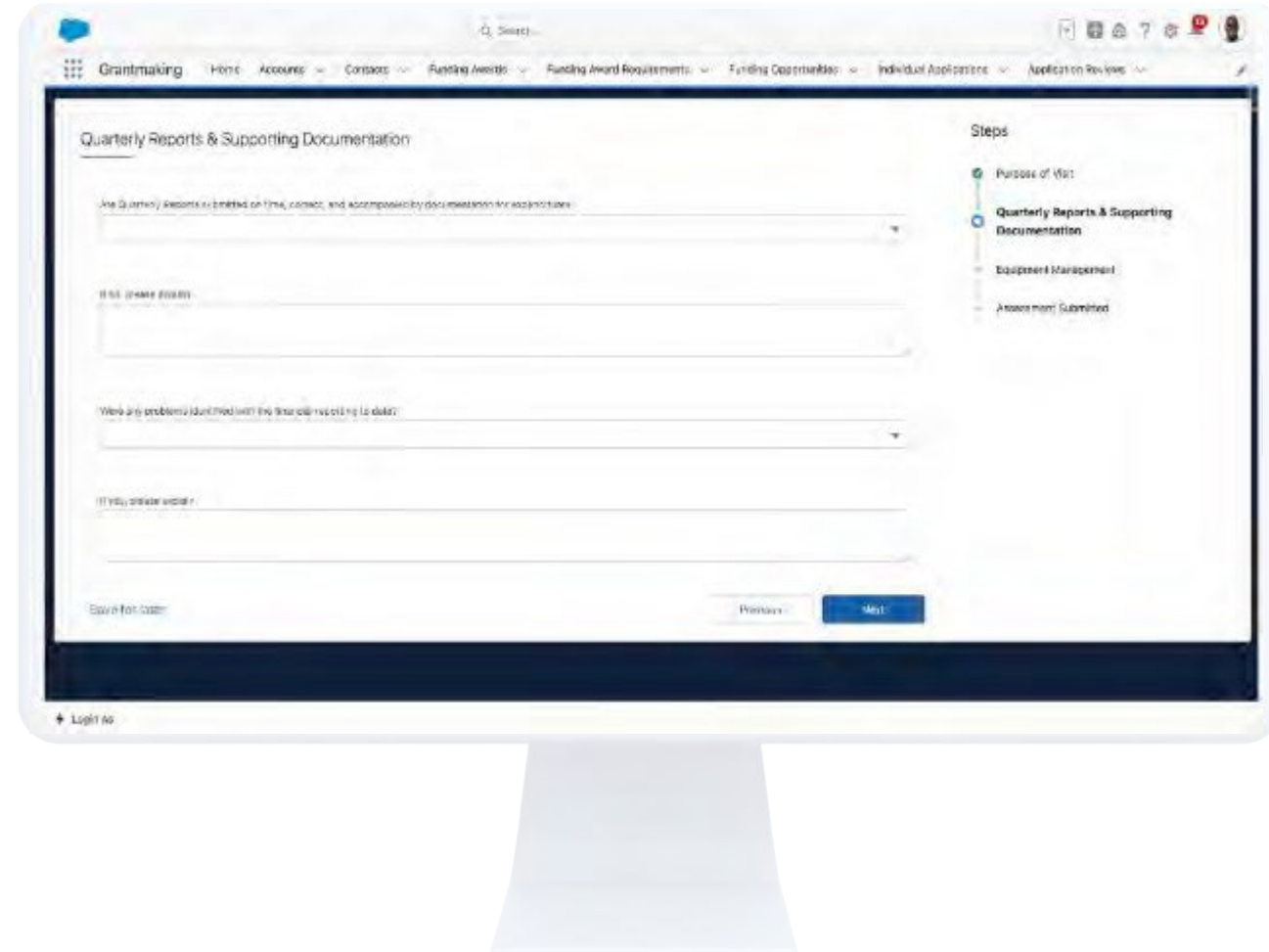
The screenshot shows the Mountain Rise Foundation website interface. At the top is a navigation bar with the logo and links for Home, Funding Opportunities, Applications, and Awards. Below the navigation is a header for the 'Funding Award' record, titled 'Award for July'. A 'New Co' button is visible in the top right corner. The main content area features a table with columns for Contact, Awardee, Amount, and Status. Below this is a tabbed interface with 'Details', 'Requirements', 'Disbursements', and 'Amendments'. The 'Details' tab is active, showing a table with columns for Budget Category, Period Four (Planned Amount, Actual Amount), and Period One (Planned Amount, Actual Amount). The 'Actual Amount' for 'Category One' is currently set to 600. Below the table, a 'Changes saved.' message is displayed. At the bottom, there are input fields for Name (Award for July) and Program.

Budget Category	Period Four		Period One	
	Planned Amount	Actual Amount	Planned Amount	Actual Amount
Category One	\$4,000.00	600		
Category Two	\$4,533.00			



Dynamic Assessments

- Grantmakers need to design detailed assessment questions and tasks that include conditional logic and dependencies in support of grant compliance and monitoring processes
- Enable Dynamic Assessment Access and Industry Assessment
- Support post-award grant compliance and monitoring activities including site inspections and/or audits related to funding awards
 - Add Dynamic Assessments to Funding Award & Funding Award Requirement objects
- Support of grant specific assessment needs



More Salesforce User Focused



Display Only Salesforce Events on Calendar

- Avoid displaying **duplicate or redundant event data** when multiple event sources are in play
- Prevent the **“Google Calendar”** or **“Microsoft Office 365”** overlay option from appearing in calendar view
- If desired to have the overlay option appear, it is not selected by default and needs to be **enabled manually**

Show Captured Events on the Salesforce Calendar Off

Einstein Activity Capture users see captured events on their Salesforce Calendar. If you sync and capture events, users see duplicate events. Users can view, edit, and track standard fields on synced events, and can only view and track standard fields on captured events.

Calendar People Cases More

SAT 29

JULY 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

My Calendars

My Events

Google Calendar™

Other Calendars



Personalize Sales Emails with Einstein GPT for Sales

- Einstein GPT uses your sales data to generate personalized emails
- Sales reps can draft emails, like a follow-up or a meeting invite, by choosing from the preset email prompt types
- This feature is available in Lightning Experience in Performance and Unlimited editions

The image displays two screenshots of the Salesforce Lightning Experience interface, illustrating the use of Einstein GPT for drafting personalized sales emails.

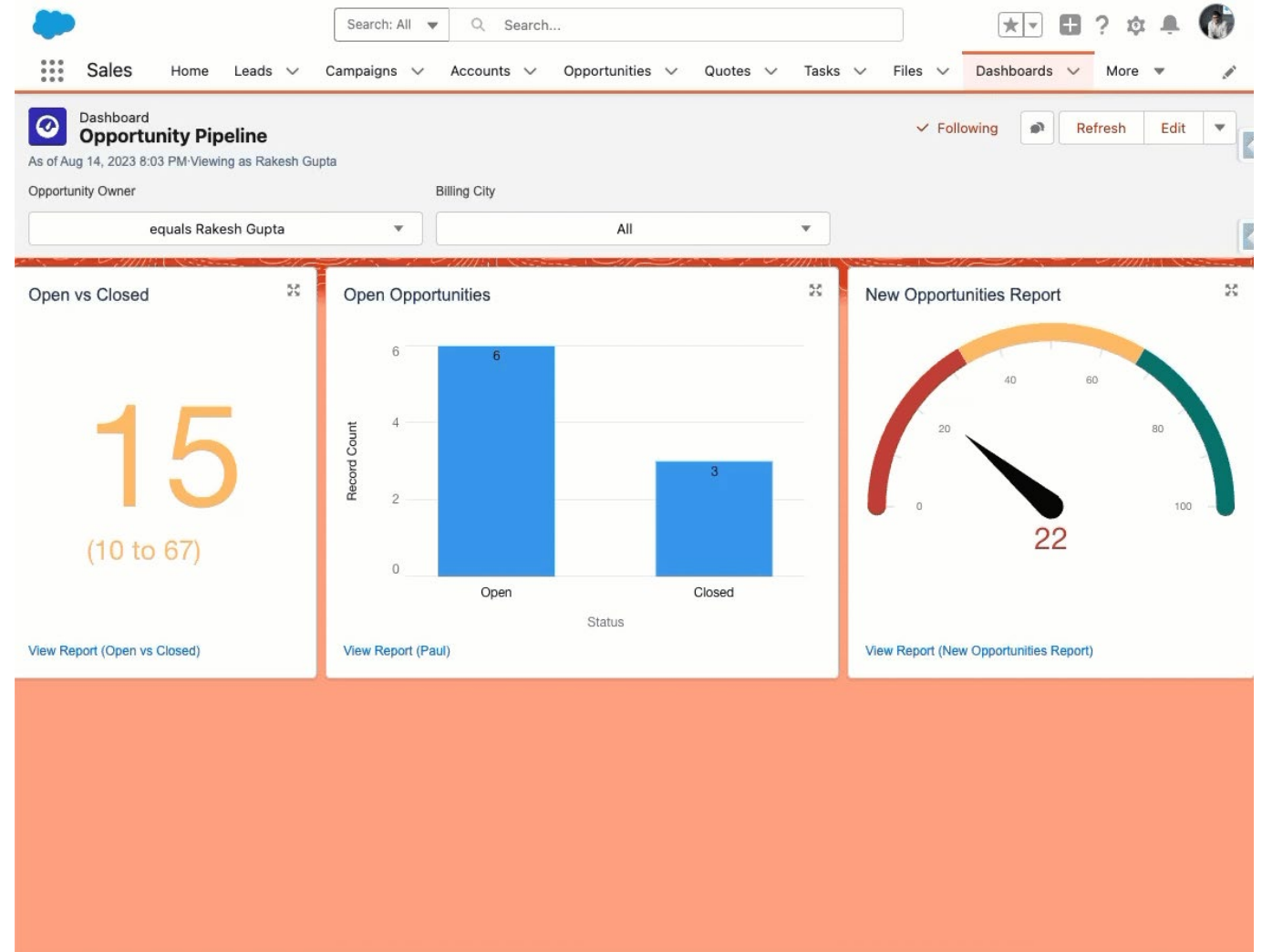
Left Screenshot: Shows the 'Draft with Einstein GPT' button highlighted with a red box and a red circle labeled '1'. The email draft is in progress, with fields for 'From' (hellouser4@sfdcmsft.com), 'To' (Bill Johnson), and 'Subject' (Enter Subject...). The 'Send' button is visible at the bottom right.

Right Screenshot: Shows the completed email draft. The subject line is 'Introducing Salesforce: Helping CFOs in Manufacturin...'. The recipient is 'Bill Johnson'. The email body contains a personalized message: 'Dear Bill Johnson, I hope this email finds you well. As a CFO in the Manufacturing industry, I understand the challenges you face in managing financial'. A red box and red circle labeled '2' highlight the 'Send' button.



Transfer Dashboard Ownership

- You can now **transfer ownership of your Lightning dashboard** to the user who's best suited to manage the dashboard access and content
- The new owner gets the **same access** as the original dashboard creator





Report on Members of a Public Group and Queue

- Using a custom report type, it is now possible to see who the members are in a Group or Queue via Reports
- Previously would have to run SQL Queries to review the data
- Managers will easily be able to move reps in and out of queues and groups

New Custom Report Type [Help for this Page](#)

Step 1. Define the Custom Report Type Step 1 of 2

[Next](#) [Cancel](#)

Report Type Focus | = Required Information

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object

Identification

Report Type Label

Report Type Name [i](#)

Note: Description will be visible to users who create reports.

Description

Store in Category

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status In Development Deployed

[Next](#) [Cancel](#)



Asset Hierarchy

- New asset will display **all assets** for the specific account being viewed
- Ability to **quickly browse** account specific assets in a single view without navigating to each asset to gather additional information
- Enabling a **new component** within the Lightning App Builder will show the hierarchy view

Revenue Excellence Home Opportunity Accounts

Account: Acme Corp

Type: Customer - Direct | Phone: (336) 222-7000 | Website: www.acmecorp.com | Primary Contact: Sarthak Kamra | Account Site: | Industry: Electronics

Manage Assets (60 Results)

#	Asset Name	Quantity	Start Date	End Date	Total Amount
1	iPhone 13 Bundle Offer	3	2/7/2023	2/6/2024	USD 749.00
	Apple iPhone 13	3	-	-	USD 649.00
	Streaming Pack	6	2/7/2023	2/6/2024	USD 50.00
	Sony Liv	3			USD 30.00
	Zee5	3			USD 20.00
	Premium OTT	6	2/7/2023	8/6/2023	USD 50.00
	Hotstar	3			USD 25.00
	Netflix	3			USD 25.00
2	LG OLED Objet Collect...	3	2/7/2023	2/6/2024	USD 1,129.00
3	Accessories	3	2/7/2023	2/6/2024	USD 449.00

Einstein Recommendation: You might be able to combine some contract for Sustainable Organics. We found the following contract looks similar to this one. Contract #004938759. Similarity score: 88.2%. The contract ends on the same date: June 30, 2023. Contains 85% or more of the same assets. Billing frequencies do not match.

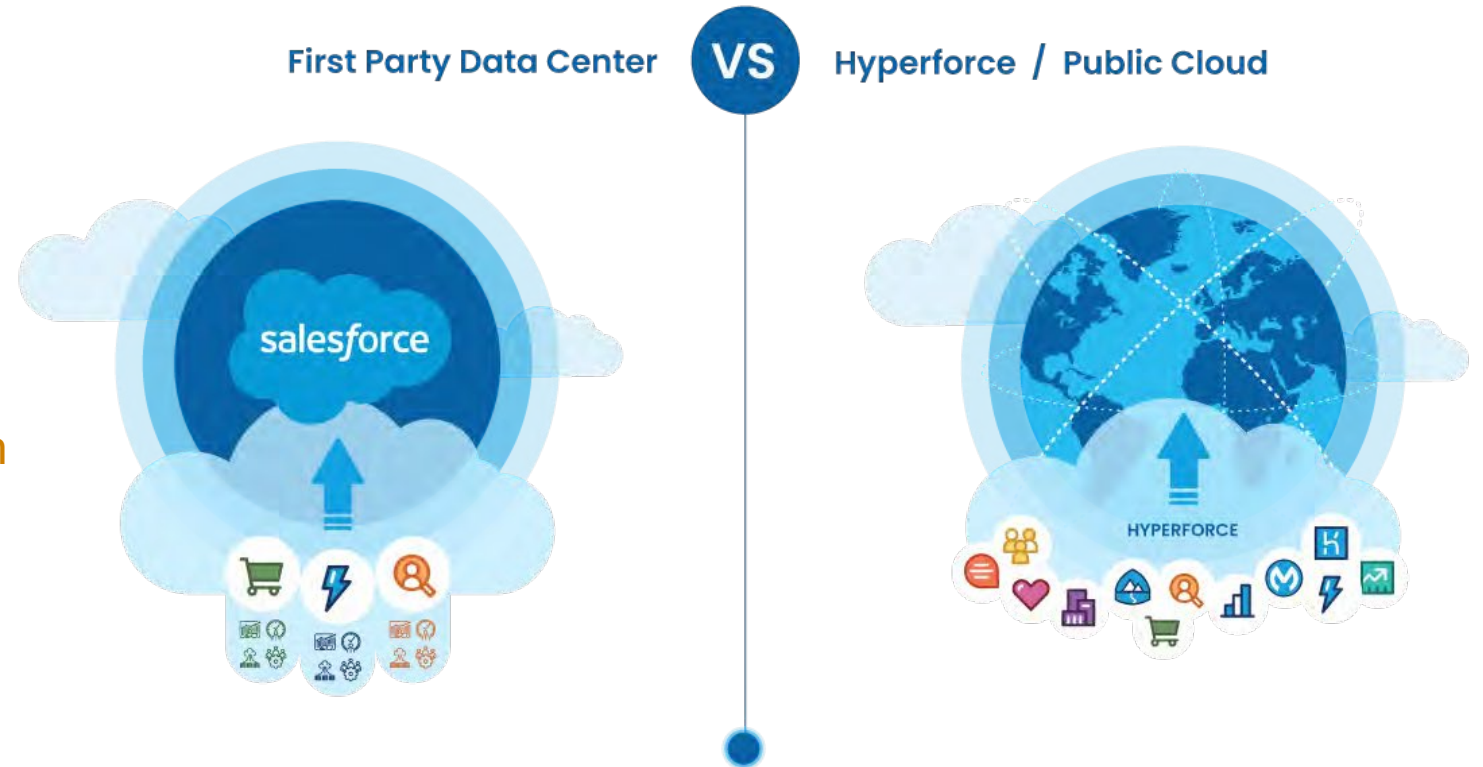
Company Details: Acme Corp. BILLING ADDRESS: 1289 Great Sails Pkwy, San Francisco, CA 94016. SHIPPING ADDRESS: R91 Skulark Drive.

More Salesforce Administrator Focused



Migrate to Hyperforce with the Assistant

- Hyperforce Assistant is now available to help with the migration process
- Allows the platform to be deployed to your choice of cloud infrastructure providers, such as **Amazon Web Services (AWS)**, **Google Cloud Platform (GCP)** and **Microsoft Azure**
- Protects customer data and ensures compliance with industry standards and regulations. [Learn More.](#)





Permission Set Summary View

- Summary View shows all the details like the API Name, Created & Modified Date and more
- Shows what Permission Set Groups it has been added to
- Overview of Permissions that have been enabled in the permission set

Permission Set
Field Service Admin License

Find Settings... | Clone | Edit Properties | Manage Assignments | **View Summary (Beta)**

Video Tutorial | Help for this Page

Permission Set Overview

Description

License | Fields

Session Activation Required

Permission Set Groups Added To 0

Apps

Settings that apply to Salesforce app custom apps built on the Lightning Platform. [Learn More](#)

System

Settings that apply across all apps, such as user management. [Learn More](#)

Account & Opportunity Access

API Name: Account_Opportunity_Access

License: --

Created By: Admin User

Last Modified By: Admin User

Namespace Prefix: --

Session Activation Required: --

Created Date: 7/21/2023, 07:01 PM

Last Modified Date: 7/21/2023, 07:06 PM

Permission Set Groups Added To: 2

Description: --

Permission Set Groups Added To

Name	API Name	Status	Description
Sales Reps	Sales_Reps	Updated	PSG for Sales Rep Access - no managers
Sales Managers	Sales_Managers	Updated	Sales Managers & Sales Execs

Permissions Enabled in This Permission Set

> User Permissions (App & System Permissions)

Object Permissions

Object Name	Object API Name	Read	Create	Delete	Edit	Modify All Records	View All Records
Account	Account	✓	✓	✓	✓	✓	✓
Opportunity	Opportunity	✓	✓		✓		



Report on Permission Set Assignment

- Reports now allow you to see which permission sets are assigned to users, all in one view
- This would be achievable with a Custom Report Type
 - Utilizing the Permission Set Assignment object
- Run a report by a user or by permission set or permission set group to see who is assigned to what in one place

Report: Permission Set Assignment Report Type
Perm Set Assignments

Total Records: 5 Total User: Active: 4

<input type="checkbox"/> User: Full Name ↑	Permission Set: Permission Set Name	Permission Set: Permission Set Type	User: Active
<input type="checkbox"/> Admin User (1)	Account_Oppportunity_Access	Regular	<input checked="" type="checkbox"/>
Subtotal			1
<input type="checkbox"/> Alyssa Admin (1)	Account_Oppportunity_Access	Regular	<input checked="" type="checkbox"/>
Subtotal			1
<input type="checkbox"/> Jose Sales Manager (2)	Sales_Managers	Group	<input checked="" type="checkbox"/>
	Account_Oppportunity_Access	Regular	<input checked="" type="checkbox"/>
Subtotal			1
<input type="checkbox"/> Leslie Sales Rep (1)	Account_Oppportunity_Access	Regular	<input checked="" type="checkbox"/>
Subtotal			1
Total (5)			4



Dynamic Forms for Standard Objects

- Dynamic Forms help display data **conditionally** and **dynamically**
- Previously only available on **custom objects**
- Now available on **standard objects**, **desktop** and **mobile**
- Enhances experience** for the users as the page layouts will not be cluttered with unnecessary fields

The screenshot shows the Lightning App Builder interface for an 'Applicant Record Page'. The interface is divided into several sections:

- Components Panel (Left):** Shows 'Fields' components. Under 'Fields Components (1)', there is a 'Field Section'. Under 'Universally Required Fields (0)', it says 'No fields available.'. Under 'Fields (36)', there is a list of fields including Age, Applicant ID, Applicant Source, Certifications Earned, Created By, Current Employer, Current Title, and Date of Birth.
- Main Canvas (Center):** Displays a preview of the 'Applicant Record Page' layout. It shows a 'Details' section with a 'Fields' list and a 'Chatter' section. A callout box highlights the 'Applicant Source' field in the 'Fields' list.
- Page Properties Panel (Right):** Shows configuration options for the page, including 'Page Label' (Applicant Record Page), 'Developer Name' (Applicant_Record_Page), 'Page Type' (Record Page), 'Object' (Applicant), and 'Template' (Header and Right Sidebar).



API Names in Permission Sets

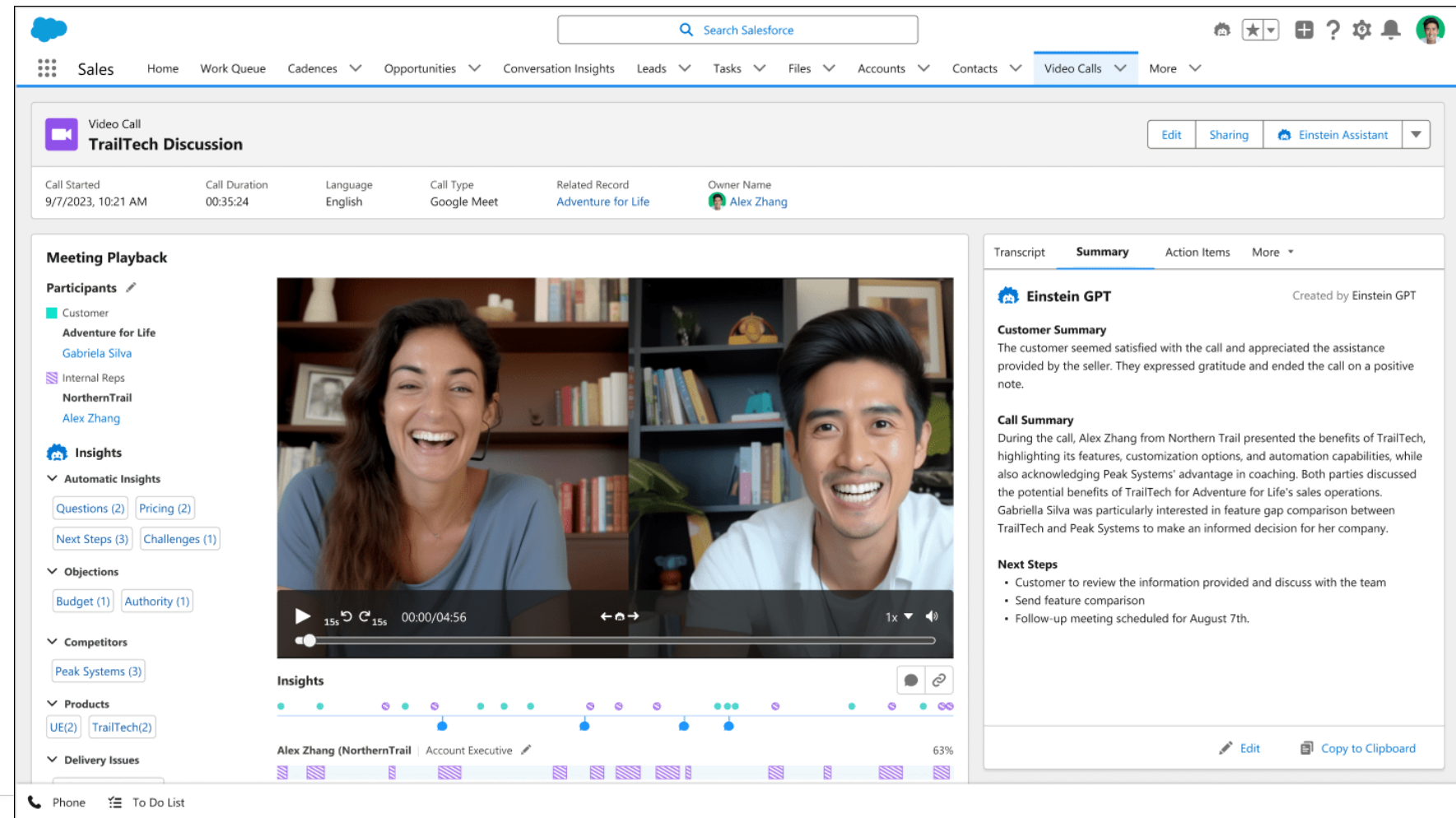
- You can now see API Names of Object and Field Permissions when configuring the Permission Sets
- This was an issue when admins were assigning objects in a permission set and two objects had the same label
- Admin experience with this update makes it easier to navigate and use permission sets

Object Name	Object API Name
Accounts	Account
App Analytics Query Requests	AppAnalyticsQueryRequest
Asset Relationships	AssetRelationship
Assets	Asset
Associated Locations	AssociatedLocation
Authorization Form Consents	AuthorizationFormConsent
Authorization Form Data Uses	AuthorizationFormDataUse
Authorization Forms	AuthorizationForm
Authorization Form Texts	AuthorizationFormText
Background Operations	BackgroundOperation
Badges	WorkBadgeDefinition
Badges Received	WorkBadge
Business Brands	BusinessBrand
Campaign Influence	CampaignInfluence
Campaign Members	CampaignMember
Campaigns	Campaign
Cases	Case
Communication Subscription Channel Types	CommSubscriptionChannelType
Communication Subscription Consents	CommSubscriptionConsent
Communication Subscriptions	CommSubscription
Communication Subscription Timings	CommSubscriptionTiming
Contact Point Addresses	ContactPointAddress
Contact Point Consents	ContactPointConsent




Create Call Summaries Powered by Einstein GPT

- Einstein can use its **generative AI talents** to write post call summaries on voice and video calls
- Will display in the **Summary tab** and includes next steps and customer feedback



The screenshot displays the Salesforce interface for a video call summary. The top navigation bar includes 'Sales', 'Home', 'Work Queue', 'Cadences', 'Opportunities', 'Conversation Insights', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Video Calls', and 'More'. The main content area shows a 'Video Call' titled 'TrailTech Discussion' with details: Call Started (9/7/2023, 10:21 AM), Call Duration (00:35:24), Language (English), Call Type (Google Meet), Related Record (Adventure for Life), and Owner Name (Alex Zhang). The 'Meeting Playback' section features a video player showing two participants: a woman (Gabriella Silva) and a man (Alex Zhang). To the left of the video player are 'Insights' categorized by 'Automatic Insights' (Questions (2), Pricing (2), Next Steps (3), Challenges (1)), 'Objections' (Budget (1), Authority (1)), 'Competitors' (Peak Systems (3)), 'Products' (UE(2), TrailTech(2)), and 'Delivery Issues'. To the right, the 'Summary' tab is active, showing 'Einstein GPT' generated content. The 'Customer Summary' states: 'The customer seemed satisfied with the call and appreciated the assistance provided by the seller. They expressed gratitude and ended the call on a positive note.' The 'Call Summary' states: 'During the call, Alex Zhang from Northern Trail presented the benefits of TrailTech, highlighting its features, customization options, and automation capabilities, while also acknowledging Peak Systems' advantage in coaching. Both parties discussed the potential benefits of TrailTech for Adventure for Life's sales operations. Gabriella Silva was particularly interested in feature gap comparison between TrailTech and Peak Systems to make an informed decision for her company.' The 'Next Steps' include: 'Customer to review the information provided and discuss with the team', 'Send feature comparison', and 'Follow-up meeting scheduled for August 7th'. The interface also includes 'Edit' and 'Copy to Clipboard' buttons for the summary.



Meeting
 2 min ago | Today

Created by Einstein GPT

B I U C
☰ ☰ ☰ ☰
I_x

Customer Feedback

The customer seemed satisfied with the call and appreciated the assistance provided by the seller. They expressed gratitude and ended the call on a positive note.


Call Summary

During the call, Sam Rhodes from Salesforce presented the benefits of Salesforce Unlimited, highlighting its features, customization options, and automation capabilities, while also acknowledging Microsoft's advantage in coaching. Both parties discussed the potential benefits of Salesforce Unlimited for Adventure for Life's sales operations.


Next Steps

- Customer to review the information provided and discuss with the team
- Finalize decision on plan options
- Follow-up meeting scheduled for August 7th.

Cancel
Save



Opportunity
Adventure for Life

Account Name	Close Date	Amount	Opportunity Owner
Adventure for Life	5/20/23	\$230,000.00	 Sam Rhodes

>

✓

✓


✓

✓


✓

Proposal/Pric

Details
Related



Call Summaries (12)




Meeting with Lauren Bailey

2 min ago | Today

Purpose

This call was to discuss the product features of Trail Trekker and identify any gaps with Alpine Adventure, which the client uses currently, in hopes of potentially migrating to Trail Trekker

[Expand](#)



Pricing Questions

10:00am | 5/3/23



Salesforce Backup & Restore

- Protect CRM data against permanent data loss and corruption with daily backups and the ability to restore data from backup
- An integration or user error may cause data loss or corruption in your org, but Backup & Restore can restore lost or corrupted data from a prior backup

Date	Log Number	Log Name
Jul 19, 2023, 10:30:40 PM	180	RESTORE_POLICY_EXECUTION_COMPLETE
Jul 19, 2023, 10:30:20 PM	179	RESTORE_REQUEST_EXECUTION_STARTED
Jul 19, 2023, 10:30:14 PM	178	RESTORE_POLICY_ENQUEUE_SUCCESSFUL
Jul 19, 2023, 10:22:49 PM	177	RESTORE_POLICY_EXECUTION_COMPLETE
Jul 19, 2023, 10:22:30 PM	176	RESTORE_REQUEST_EXECUTION_STARTED
Jul 19, 2023, 10:22:07 PM	175	RESTORE_POLICY_ENQUEUE_SUCCESSFUL
Jul 19, 2023, 10:15:59 PM	174	RESTORE_POLICY_EXECUTION_COMPLETE

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:

James.Moore@armanino.com

Peter.Kim@armanino.com

Armanino Operates in an Alternative Practice Structure:

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