

[248] Nonprofit Cloud Release Notes

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Acrolinx Score:

Reviewers:

Please use Suggesting mode and Comments to provide feedback. When you're done, sign off in the table. Please review by DOW Month DD, YYYY (EOD Pacific time).

Reviewer Name	Date Draft Provided to Reviewer	Reviewer: Date You Signed Off	Reviewer: Sign Off?
Elizabeth Swander		11/20	<input checked="" type="checkbox"/>
David Taylor			<input type="checkbox"/>
J.J. Miller			<input type="checkbox"/>
Derrick Koon		11/28	<input checked="" type="checkbox"/>
Tarren Anderson		12/1	X

Nonprofit Cloud Release Notes

Salesforce for Nonprofits includes managed package and platform solutions for nonprofits. Platform-based Nonprofit Cloud enhancements for fundraising make it easier to measure ROI for donor upgrade campaigns, improve digital fundraising and tracking, and streamline donor support requests. Nonprofit Cloud enhancements for programs and Grantmaking include Experience Cloud improvements, indication of which care plan goals you expect to drive outcomes, and the auto-calculation of results for outcomes. Updates to the Nonprofit Success Pack managed package improve identifying and correcting potential duplicates.

Manage and Review Budgets

Applicants can enter and submit budget details for each category and period of a grant cycle.

Reviewers can see details of a budget directly on a grant application record. And internal users can enter details directly on the budget record.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

Who: Users with the Grantmaking Manager or Experience Cloud for Grantmaking permission set can create and update budgets.

SEE ALSO

[Salesforce Help: Add the Budget Component to the Budget Page Layout \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Add Grantmaking Components and Fields to the Individual Application Page Layout \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Budget Management \(can be outdated or unavailable during release preview\)](#)

Program & Case Management Enhancements

<shortdesc> </shortdesc>

Provide More Access for Experience Cloud Users

The Program and Case Management for Experience Cloud permission set now includes create, read, update, and delete permissions for more Program and Case Management objects. Look at the permission set in your org for details.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Program Management is enabled.

Who: To manage and deliver programs and benefits in an Experience Cloud site, users need the Program and Case Management for Experience Cloud permission set.

How: To enhance or mute permissions in the Program and Case Management for Experience Cloud permission set, add the Program and Case Management for Experience Cloud permission set to a permission set group that includes your own permission sets and assign the permission set group to users.

Fundraising Enhancements

Fundraising Enhancements make it easier to build integrations with, to measure the ROI of upgraded campaigns with a new way to attribute revenue on gift commitments, improvement of digital fundraising and tracking with Outreach Source Code URLs, and tracking payment data to streamline donor support requests and accounting tasks.

Analyze Fundraising Performance Directly in Fundraising (PILOT)

Fundraising Intelligence provides CRMA Dashboards on Data Cloud and in Fundraising Workflows to empower fundraisers to self-service actionable data within their daily workflows to support their goals.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising is enabled.

Who: Users with the FundraisingAccess permission set and the Nonprofit Intelligence Admin permission set can use Fundraising Intelligence. Users with the Nonprofit Intelligence view permission can see the dashboards.

Why: With CRMA Embedded Analytics, fundraisers can deeply analyze their organization's fundraising performance directly in their workflow and within their app homepages. This analysis helps users understand the performance of each fundraising strategy to make data driven investment decisions.

How: Use the Guided Setup to complete the setup steps.

Links & See Also: [Access to more resources](#)

Feature Impact:

adminSetup	Admin must enable	Admins have to enable this functionality to expose it. The feature can be for any audience.
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Product Area = Nonprofit Cloud

Edition = EE UE DE

UI_Platform = sfx

Quickly Build an Integration with Fundraising

Third-party vendors can use the Business Process API to easily integrate their applications with Fundraising. They can easily maintain the integrations with a lower cost of ownership. They can match or create donor records, match or create recurring donations and installments, store payment data from externally processed gifts, link campaigns, source codes, and designations, add data to custom fields, and submit donation data in a single payload.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising is enabled.

Who: Users with the FundraisingAccess permission set can access the Nonprofit Cloud for Fundraising applications.

Why: The Business Process API is an investment in partners to make faster and easier integrations with Nonprofit Cloud.

How: Use the Business Process Connect API endpoints to access the Business Process API tool.

Links & See Also: Access to more resources

Feature Impact:

autoAdminDev	Enabled for admins/devs	This enhancement exposes new functionality to admins or devs without the admins having to enable anything.
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Product Area = Nonprofit Cloud

Edition = EE UE DE

UI_Platform = sfx

Split Gift Transaction Amount Attribution Across Multiple Campaigns

Split the campaign upgrade attribution of a gift transaction across multiple campaigns. This makes it easier to measure the ROI of upgraded campaigns with a new way to attribute revenue on gift commitments.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising is enabled.

Who: Users with the FundraisingAccess permission set can access the Nonprofit Cloud for Fundraising applications.

Why: Attribute a transaction to upgraded campaigns in the ratio in which the campaigns influenced the transaction amount.

Links & See Also: [NPC_FR_Manage_Gift_Commitment.dita](#)

https://help.salesforce.com/s/articleView?id=sfdo.NPC_FR_Manage_Gift_Commitment.htm

Feature Impact:

autoAdminDev	Enabled for admins/devs	This enhancement exposes new functionality to admins or devs without the admins having to enable anything.
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Product Area = Nonprofit Cloud

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UI_Platform = sfx

Draft Gift Proposal Generation (PILOT)

Quickly write personalization of gift proposals with the Draft Gift Proposal with Einstein Generative AI feature.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising is enabled.

When: Delayed availability info - 250 release?

Who: Users with the FundraisingAccess permission set can access the Nonprofit Cloud for Fundraising applications.

Why: Major gift officers, grantwriters, and nonprofit employees can overcome the challenge of quickly writing personal communication, by drafting highly personalized gift proposals with Einstein Generative AI.

Links & See Also: [Setup Draft Gift Proposal article](#) & [Draft Gift Proposal article](#)

Feature Impact:

autoAdminDev	Enabled for admins/devs	This enhancement exposes new functionality to admins or devs without the admins having to enable anything.
adminSetup	Admin must enable	Admins have to enable this functionality to expose it. The feature can be for any audience.

Product Area = [Nonprofit Cloud](#)

Edition = [EE](#) [UE](#) [DE](#)

UI_Platform = [sfx](#)

Prevent the Creation of Duplicate Person Accounts in Gift Entry

Use Duplicate Matching in Gift Entry to keep from creating duplicate person accounts.

Where: These features apply to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising is enabled.

Who: Users with the FundraisingAccess permission set can access the Nonprofit Cloud for Fundraising applications.

Links & See Also: [Use Duplicate Matching article](#)

Feature Impact:

autoAdminDev	Enabled for admins/devs	This enhancement exposes new functionality to admins or devs without the admins having to enable anything.
adminSetup	Admin must enable	Admins have to enable this functionality to expose it. The feature can be for any audience.

Product Area = [Nonprofit Cloud](#)

Edition = [EE](#) [UE](#) [DE](#)

UI_Platform = sfx

Create Outreach Source Code URLs

Digital Fundraisers can save time by auto-generating unique URLs based on user-defined UTM parameters that can be shared across different channels. These unique web links can be used to tie an online donation back to the outreach source code and to track the effectiveness of online outreach.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising is enabled.

Who: Users with the FundraisingAccess permission set can access the Nonprofit Cloud for Fundraising applications.

Links & See Also: [NPC_FR_Turn_On_Fundraising.dita](#)

https://help.salesforce.com/s/articleView?id=sfdo.NPC_FR_Turn_On_Fundraising.htm

, [NPC_FR_Use_Outreach_Source_Code_URLs.dita](#)

https://help.salesforce.com/s/articleView?id=sfdo.NPC_FR_Use_Outreach_Source_Code_URLs.htm

Feature Impact:

adminSetup	Admin must enable	Admins have to enable this functionality to expose it. The feature can be for any audience.
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Product Area = Nonprofit Cloud

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UI_Platform = sfx

Track Payment Data

Streamline donor support requests, track processing fees, easily reconcile accounting, and manage integrations with independent software vendors and gateways with improved methods to track payment data (including payment method details, transaction fees, and gateway and processor metadata).

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising is enabled.

Who: Users with the FundraisingAccess permission set can access the Nonprofit Cloud for Fundraising applications.

Links & See Also: [NPC_FR_Manage_Gift_Commitment.dita](#)

https://help.salesforce.com/s/articleView?id=sfdo.NPC_FR_Manage_Gift_Commitment.dita.htm

Feature Impact:

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https://developer.salesforce.com/docs/atlas.en-us.industries_reference.meta/industries_reference/outcome_management_developer_guide.htm

https://developer.salesforce.com/docs/atlas.en-us.nonprofit_cloud.meta/nonprofit_cloud/npc_fundraising_standard_objects.htm

New and Changed Objects for Fundraising

Do more with the new and updated Fundraising objects.

Store payment method details to complete transactions

Use the new PaymentInstrument object.

Log Gift Commitment changes to track commitment upgrades and downgrades

Use the new GiftCmtChangeAttrLog object to store the history of changes to a Gift Commitment over time with attribution to the source campaign or source code that's resulted in the change.

Links & See Also

Set UTM parameters with new fields on the Fundraising Configuration object for tracking an Outreach Source Code URL:

Use the new fields UTMSource, UTMMedium, UTMCampaign, and DonorMatchingMethod on the FundraisingConfiguration object.

Create unique digital fundraising messages and track the success of the outreach:

Use the new fields SourceCodeBaseUrl, SourceCodeUrl, MessageChannel, MessageChannelPlatform, MessageChannelPlatformAccount, MessageTitle, and MessageContent on the OutreachSourceCode object.

Create a tribute to honor someone on behalf of the donor in gift entry:

Use the new fields `TributeType`, `NotificationDate`, `NotificationStatus`, `HonoreeContact`, `HonoreeName`, `HonoreeInformation`, `NotificationContact`, `NotificationContactName`, `NotificationEmail`, `NotificationInfo`, `NotificationChannel`, and `NotificationMessage` on the `GiftEntry` object.

Enter payment identification information from the payment instrument for gift entry:

Use the new fields `Last4`, `ExpiryMonth`, and `ExpiryYear` on the `GiftEntry` object.

See processor fees and gateway information and fees to inform refunds.

Use the new fields `GatewayTransactionFee`, `ProcessorTransactionFee`, `LastGatewayResponseCode`, `LastGatewayErrorMessage`, and `LastGatewayProcessedDate` on the `GiftRefund` object.

See payment and outreach source code information to track changes on the commitment:

Use the new fields `OutreachSourceCode`, `ProcessorReference`, and `PaymentInstrument` on the `GiftCommitmentSchedule` object.

Log payment gateway and processor information to track fees, references, error messages, and processed date:

Use the new fields `PaymentInstrument`, `GatewayTransactionFee`, `ProcessorTransactionFee`, `TotalTransactionFee`, `ProcessorReference`, `GatewayReference`, `LastGatewayResponseCode`, `LastGatewayErrorMessage`, and `LastGatewayProcessedDate` on the `GiftTransaction` object.

Track the aggregated amount of a commitment that's upgraded with a donation to an additional campaign:

Use the new field `AttributedAmount` on the `OutreachSummary` object.

SEE ALSO: Fundraising Developer Guide

New Fundraising Metadata Type

<short desc>

Metadata

<description>

Generate Draft Gift Proposal flow [PILOT]

Generates content for nonprofit use cases that require additional information in the prompt.

New and Updated Connect APIs

Make the most of the new Connect APIs in Nonprofit Cloud for Fundraising.

Business Process API endpoints

Create new Gift Transactions with the Donor, Payment Instrument, and optionally Designations

Make a POST request to the new `/connect/fundraising/gifts` resource.

New request body: Create Gift Input

New response body: Create Gift Output

Create a new Gift Commitment, Schedule, Payment Instrument and optionally Default Designations

Make a POST request to the new `/connect/fundraising/commitments` resource.

New Request body: Create Commitment Input

New Response body: Create Commitment Output

Modify the Schedule of an existing Gift Commitment

Make a PATCH request to the existing

`/connect/fundraising/commitments/${commitmentId}` resource.

New request body: Update Commitment Input

New response body: Update Commitment Output

Update the transaction status and payment information for a collection of Gift Transactions

Make a POST request to the existing

`/connect/fundraising/transactions/payment-updates` resource.

New request body: Transaction Payment Updates Input

New response body: Transaction Payment Updates Output

Update the future payment information for a collection of Gift Commitments

Make a POST request to the existing

`/connect/fundraising/commitments/payment-updates` resource.

New request body: Commitment Payment Updates Input

New response body: Commitment Payment Updates Output

Links & See Also: Business Process API feature article.

Industries Common Features with Updates in 248:

Action Launcher - Service Excellence

Link to the full-qualified URL for the features RN parent topic:

//doc/248/patch/core/en/xmlsource/release_notes/industries/action_launcher/rn_action_launcher.xml

Biz value to NpC:

Deliver better donor support by adding actions in the Action Launcher Lightning Web Component to quickly and easily launch button or link-based actions to resolve donor requests. Administrators can now customize the title shown on the Action Launcher component to provide a more branded experience.. If out-of-the-box deployments are available, Administrators can use them right away to configure Action Launcher.

Actionable List Members - Sales Excellence

Link to the full-qualified URL for the features RN parent topic:

Biz value to NpC: Deliver better donor support by adding actions in the Action Launcher Lightning Web Component to quickly and easily launch button or link-based actions to resolve donor requests. Administrators can now customize the title shown on the Action Launcher component to provide a more branded experience.. If out-of-the-box deployments are available, Administrators can use them right away to configure Action Launcher.

Actionable Segmentation - Sales Excellence

Link to the full-qualified URL for the features RN parent topic:

/Users/ewiedemer/dev/doc/248/patch/core/en/xmlsource/release_notes/industries/actionable_segmentation/rn_common_actionable_segmentation.xml

Biz value to NpC: Use predefined Data Processing Engine definitions to create actionable list definitions easily and quickly. Configure the filter input type as Multi-Select Picklist for the applicable dataset columns to help list creators filter with ease on the List Builder page. List creators can now use filter templates to save the time and effort required to filter dataset records.

Batch Management - **NO RN**

Link to the full-qualified URL for the features RN parent topic: Biz value to NpC:

Bulk Action Panel - Sales Excellence

Link to the full-qualified URL for the features RN parent topic:

/Users/ewiedemer/dev/doc/248/patch/core/en/xmlsource/release_notes/industries/bulk_action_panel/rn_bulk_action_panel.xml

Biz value to NpC: Administrators can further streamline fundraising operations by adding bulk actions to Bulk Action Panel, which are specific to an actionable list.

Business Rules Engine - *Updates related for: Decision Explainer and Decision Tables*

Link to the full-qualified URL for the features RN parent topic:

/Users/ewiedemer/dev/doc/248/patch/core/en/xmlsource/release_notes/industries/business_rules_engine/rn_business_rules_engine_intro.xml

Biz value to NpC: Call the ready-to-use executable expression set templates from Flow or other calling processes. Create precise rules with the operators and functions that consider null values. Use the enhancements in decision tables to simplify and streamline lookups. Show your users more targeted and nuanced explanations for expression set version step results with the enhancements in Decision Explainer.

Data Processing Engine

Link to the full-qualified URL for the features RN parent topic:

/Users/ewiedemer/dev/doc/248/patch/core/en/xmlsource/release_notes/industries/data_processing_engine/rn_data_processing_engine.xml

Biz value to NpC: Use a forecast node in a Data Processing Engine definition to generate forecasts based on historical data. Use variables of type expression in a formula node when you don't know the exact evaluation or calculation logic when creating a definition.

Grantmaking

Link to the full-qualified URL for the features RN parent topic:

/Users/ewiedemer/dev/doc/248/patch/core/en/xmlsource/release_notes/industries/grantmaking/rn_grantmaking.xml

Biz value to NpC: Grant seekers can now add collaborators to help with grant applications in an Experience Cloud site. Grant makers and recipients can now see the difference between planned and actual budget spent. Grant makers can add invitation-only application funding opportunities to Experience Cloud.

Outcome Management

Link to the full-qualified URL for the features RN parent topic:

//doc/248/patch/core/en/xmlsource/release_notes/industries/outcome_management/rn_outcome_management.xml

Biz value to NpC: Take the manual work out of adding indicator results and ensure that results are measured consistently with a flow. Collaborate with partner organizations and grantees in Experience Cloud. Connect Outcome Management to care plans in Case Management.

Timeline - Service Excellence - TBD

Link to the full-qualified URL for the features RN parent topic:

Biz value to NpC:

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