

[246] Nonprofit Cloud Release Notes

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?
Meg Gray			<input type="checkbox"/>
Alison Meyer	7/24/2023		<input type="checkbox"/>
Elizabeth Swander	7/24/2023		<input type="checkbox"/>
J.J. Miller	7/24/2023	8/1/2023	<input checked="" type="checkbox"/>
Sonali Surajit Dasgupta	7/24/2023		<input type="checkbox"/>
Yaman Rathore	7/24/2023		<input type="checkbox"/>
Michael Smith	7/24/2023		<input type="checkbox"/>
			<input type="checkbox"/>

[Nonprofit Cloud Release Notes](#)

[Example Release Notes](#)

[Note Title \(feature\)](#)

[Manage and Review Budgets](#)

[New Objects and Fields in Case Management](#)

[Action>Object>Goal](#)

[Connect grant records to programs](#)

[New Case Management Metadata Type](#)

[Metadata](#)

[Enter multiple budget category values in one easy form](#)

[Case Management](#)

[Note Title \(feature\)](#)

[New Objects and Fields in Case Management](#)

[Action>Object>Goal](#)
[New Case Management Metadata Type](#)
[Metadata](#)
[Program Management](#)
[Note Title \(feature\)](#)
[New Objects and Fields in Program Management](#)
[Action>Object>Goal](#)
[New Program Management Metadata Type](#)
[Metadata](#)
[Fundraising](#)
[NotFundraisingFundraisinge Title \(feature\)](#)
[New Objects and Fields in Fundraising](#)
[Action>Object>Goal](#)
[New Fundraising Metadata Type](#)
[Metadata](#)

Nonprofit Cloud Release Notes

<short desc>

Example Release Notes

<short desc>

Note Title (feature)

<short desc>

Where: Which editions, pilot & beta disclaimers

When: Delayed availability info

Who: License or permissions limitations

Why: Optional details on use case, purpose, & benefit

How: Optional overview of setup, or how to use the feature

Screenshots & Graphics: Integrates images in why & how sections

Links & See Also: Access to more resources

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 \(can be outdated or unavailable during release preview\)](#)

New Objects and Fields in Case Management

<short desc>Do more with the new and updated Case Management objects.</short desc>

Action>Object>Goal

<description>

Links & See Also

Connect grant records to programs

Manage programs as part of Grantmaking and use the new Program field on Budget, FundingAward, and FundingOpportunity.

New Case Management Metadata Type

<short desc>

Metadata

<description>

Links & See Also

Enter multiple budget category values in one easy form

Add the Budget Lightning Web Component to Experience Cloud, Lightning Experience record pages, or Flow Builder.

Case Management

<short desc>

Note Title (feature)

<short desc>

Where: Which editions, pilot & beta disclaimers

When: Delayed availability info

Who: License or permissions limitations

Why: Optional details on use case, purpose, & benefit

How: Optional overview of setup, or how to use the feature

Screenshots & Graphics: Integrates images in why & how sections

Links & See Also: Access to more resources

New Objects and Fields in Case Management

<short desc>Do more with the new and updated Case Management objects.</short desc>

Action>Object>Goal

<description>

Links & See Also

New Case Management Metadata Type

<short desc>

Metadata

<description>

Program Management

<short desc>

Note Title (feature)

<short desc>

Where: Which editions, pilot & beta disclaimers

When: Delayed availability info

Who: License or permissions limitations

Why: Optional details on use case, purpose, & benefit

How: Optional overview of setup, or how to use the feature

Screenshots & Graphics: Integrates images in why & how sections

Links & See Also: Access to more resources

New Objects and Fields in Program Management

<short desc>Do more with the new and updated Case Management objects.</short desc>

Action>Object>Goal

<description>

Links & See Also

New Program Management Metadata Type

<short desc>

Metadata

<description>

Nonprofit Cloud for Fundraising

Nonprofit Cloud for Fundraising provides new and easy ways to engage donors, raise funds, and drive outcomes with tools for strategic planning and data-driven insights. Built upon the secure and trusted foundation of Salesforce, Fundraising helps you increase operational efficiency, collaboration, and adoption of best-in-class practices.

Complete Your Work Using a Convenient App

Common nonprofit responsibilities and tasks are grouped in four Nonprofit Cloud Fundraising apps.

Nonprofit Cloud for Fundraising has four apps to help group common tasks and responsibilities. These apps are:

- **Fundraising Strategy** – Offers a top-level understanding of fundraising activity and data.
- **Donor Engagement** – Provides quick access to track and manage your marketing efforts with campaigns and source codes.
- **Philanthropy & Partnerships** – Work with and record interactions with major donors, grant makers, and planned gifts on high impact giving.
- **Fundraising Operations** – Where to go to assist donors with their requests and for routine gift entry and processing.

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. To perform tasks in the Philanthropy & Partnerships app, users need the Fundraising_Admin or Fundraising_User permission set group. Enable all common components before using the Philanthropy & Partnerships app.

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

Log Gifts Singly and in Batches

Quickly log single gifts or batches of gifts for accounting and reporting purposes.

Log gifts singly or use Gift Batch Templates to enter gifts in batches. Record gifts against commitments, assign designations and add soft credits to the transactions.

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 manage Gift Entry.

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

Provide Refunds

Provide full or partial refunds upon request.

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 perform refunds.

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

Create and Manage Campaigns

Create, manage, and track fundraising campaigns for your organization.

Create campaigns and use source codes to track outreach efforts and measure performance. Tailor campaigns with audience details to reach the right people. Set up and manage campaign allocations. Track outreach and campaign trends with rollups for monitoring.

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 create and manage campaigns.

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

Create and Manage Gift Commitments

Create, schedule, manage, and track gift commitments for your organization.

Create gift commitments with custom or recurring schedules. Easily associate incoming gifts with existing gift commitments. Manage gift commitments by updating the schedules, changing the commitment amount, updating the payment method, assigning gift designations, pausing and resuming the commitment, and closing gift commitments.

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 create and manage gift commitments.

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

Designate Gift Commitments and Gift Transactions

Allocate commitments and transactions to specific funds or designations.

Commitments, campaigns, and major gifts can define the default funds to which all gifts associated with the commitment, campaign, or major gift are automatically allocated. These default allocations are Gift Default Designations. All other allocations assigned to gift transactions that aren't default designations, are Gift Designations. Each gift transaction can have more than one designation.

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 create and manage gift commitments.

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

Support Your Donors

Support your donors with fast action on their requests in the Donor Support Console. Review the timeline for a quick view of the requests, such as for changing commitment schedules and pausing or resuming a commitment.

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

Who: Users with the FundraisingAccess permission set and the Fundraising_User or Fundraising_Admin permission set group can access the Donor Support Console.

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

New Objects and Fields in Fundraising

Do more with the new Fundraising objects.

Enter Gifts into Fundraising to log all gifts received by your organization

Log donations received by your organization in the Gift Entry object. Gifts can be entered singly or in bulk with the Gift Batch object.

With Shield Platform Encryption, you can add another layer of security to these fields on the Gift Entry object:

- First Name
- Last Name
- Email
- Mobile Phone
- Home Phone
- Street
- City
- State/Province
- Country
- Organization Name

SEE ALSO:

[Encrypt Gift Entry Data](#)

Record Gift Transactions and their designations to track your organization's incoming transactions and how those funds are to be used

Enter a Gift Transaction and assign the Gift Transaction Designation using a custom designation or the Gift Default Designation. The Gift Transaction is connected to the Gift Designation (where the gift is allocated) by the Gift Transaction Designation.

Issue soft credits for a gift transaction

When a donation from one person is received, add full or partial soft credits for other members of their household or third-party designees. The Gift Soft Credit is awarded to the designees for the Gift Transaction.

Issue donors refunds upon request

Issue partial or full donation refunds in the Gift Refund object.

Honor individuals or groups with a tribute

Create a Gift Tribute that defines an individual or group for whom a gift has been made, including the details and status of the tribute.

Create and manage donor gift commitments

When a donor makes a commitment to give a certain amount of money, at a set rate or number of installments, over a determined time period, log this as a Gift Commitment. As you record the commitment, you set the amount and how often it will be received in the Gift Commitment Schedule. You can also review the commitment details, review the gifts received, and track progress on the commitment in the gift commitment record.

Track campaigns with outreach source codes to understand the effectiveness of each appeal

Identify the audience and outreach methods to track each appeal on your campaign with an Outreach Source Code. Track campaign results in the Outreach Summary object.

Summarize the giving histories of your donors to better understand how to approach them for donations

Before approaching your donors for a new gift, review a summary of their giving history on their Donor Gift Summary to best group your donors for the appeal.

Review the Donor Profile on the Contact Profile object to know how best to approach donors for a donation

See a donor's financial assets and giving history to other organizations in their Donor Profile view on the Contact Profile object to understand their finances and how they donate. Use this information to tailor funding requests.

SEE ALSO

- *Salesforce Developer Documentation: Nonprofit Cloud for Fundraising*

New Nonprofit Cloud for Fundraising Metadata Type

Make the most of the new metadata type of Nonprofit Cloud for Fundraising.

Fundraising Setup Base Platform Object

Configure the settings for Nonprofit Cloud for Fundraising

Use the new FUNDRAISINGCONFIG metadata type.

New Nonprofit Cloud for Fundraising Connect APIs

Retrieve the gift transaction designations for a gift transaction

Make a GET request to the new

/connect/fundraising/transaction/\${transactionId}/designations resource.

New response body: Gift Transaction Designation List

Retrieve the gift transactions for a gift commitment

Make GET request to the new */connect/fundraising/donor/\${donorId}/commitments* resource.

New response body: Gift Transaction List

Retrieve the gift default designations for a campaign

Make a GET request to the new

/connect/fundraising/campaign/\${campaignId}/default-designations resource.

New response body: Gift Default Designation List

Retrieve the gift default designations for a gift commitment

Make a GET request to the new */fundraising/commitment/{id}/default-designation* resource.

New response body: Gift Default Designation List

Retrieve the gift transactions for a gift commitment

Make a GET request to the new

/connect/fundraising/gift-commitments/{commitmentId}/gift-transactions resource.

New response body: Gift Transaction List

Retrieve the gift transactions for a gift commitment schedule

Make a GET request to the new

/connect/fundraising/gift-commitment-schedules/{scheduleId}/gift-transactions resource.

New response body: Gift Transaction List

New Invocable Actions for Nonprofit Cloud for Fundraising

Use these new invocable actions for Fundraising.

Update the processing status of a gift entry

Use the `updateProcessedGiftEntries` action.

Create or update a recurring gift commitment schedule

Use the manageRcrGiftCmtSchd action.

Create or update custom gift commitment schedules

Use the manageCustomGiftCmtSchds action.

Pause a gift commitment schedule for a specified period of time.

Use the pauseGiftCommitmentSchedule action.

Create and manage gift default designations for a gift entry

Use the manageGiftDefaultDesignations action.

Create and manage gift transaction designations for a gift transaction

Use the manageGiftTrxnDesignations action.

Process a single or a batch of gift entries

Use the processGiftEntries action.

Resume a gift commitment schedule

Use the resumeGiftCommitmentSchedule action.

Close a gift commitment

Use the closeGiftCommitment action.

Process a gift commitment

Use the processGiftCommitment action.

New Flows for Nonprofit Cloud for Fundraising

Fundraising uses these flows.

- **Manage Gift Entries:** Creates and updates a gift entry.
- **Close Gift Commitment:** Updates the status of a gift commitment to Closed and updates the status of the associated gift transactions.
- **Process Gift Batch:** Processes gift entries in a specified gift batch.
- **Manage Gift Designations:** Assigns gift designations to the associated gift commitment or gift transactions.
- **Manage Gift Commitment Schedule:** Creates and updates recurring and custom type of gift commitment schedules.

- **Get Gift Commitments:** Retrieves the active gift commitments for a donor or a gift commitment.
- **Update Recurring Schedule:** Updates a recurring gift commitment schedule.
- **Pause | Resume:** Pauses a gift commitment schedule for a fixed time period or indefinitely and resumes a paused gift commitment schedule.
- **Coordinate Gift Commitment Processing:** Runs batch jobs that update gift commitments based on associated gift commitment schedules and gift transactions.
- **Process Gift Commitment:** Processes a gift commitment associated with a gift commitment schedule or gift transaction.

New Lightning Web Components for Nonprofit Cloud for Fundraising

Fundraising uses these Lightning Web Components.

- **Custom Schedule:** Adds custom schedule records to a gift commitment. Used in the Manage Gift Commitment Schedule flow.
- **Soft Credit:** Associates soft credit records with a gift entry. Used in the Manage Gift Entries flow.
- **Lookup-Record Fields:** Looks up a record and shows the selected record's fields. Used in the Manage Gift Entries and Get Gift Commitments flows.
- **Record Detail Lookup:** Fetches all fields for a selected lookup record. Used in the Manage Gift Entries flow.
- **Gift Designation:** Allocates gift designations to a gift entry, gift commitment, or gift transaction. Used in the Manage Gift Entries, Manage Gift Transaction Designation, and Manage Gift Default Designation flows.

SEE ALSO

- *Salesforce Developer Documentation: Nonprofit Cloud for Fundraising*

Note Title (feature)

<short desc>

Where: Which editions, pilot & beta disclaimers

When: Delayed availability info

Who: License or permissions limitations

Why: Optional details on use case, purpose, & benefit

How: Optional overview of setup, or how to use the feature

Screenshots & Graphics: Integrates images in why & how sections

Links & See Also: Access to more resources