

 salesforce.org

Base Camp Resource Guide



Resource Guide

How to use this guide

 salesforce.org

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In this Resource Guide, you'll find a list of common features that are useful to new customers.

- Each feature contains a link with more information. If it fits your organizations needs, take a look at the available resources for a deeper look at how to enable/configure it in your Nonprofit Cloud instance.
- **Always-on resources** are video recordings and trailhead modules which are available to all customers.
- **Premier Resources** (highlighted in blue) provide expert guidance and support. These are available only to customers with a Premier or Signature Success plan. If you would like access to these resources, talk to your account executive. (Find your account executive [here](#))
- Features marked with a '\$' symbol are add-on products. Talk to your account executive to inquire about licenses. (Find your account executive [here](#))

Resource Guide

Getting Started

If you...

Get Set Up for Success

Review Always-on Resources

Access Premier Resources

Premier
Success
Required

Would like to set up Nonprofit Cloud on your own

Register for an
NPSP Base Camp Session



[Prepare for Success with Nonprofit Cloud](#)



[Explore Nonprofit Success Pack \(NPSP\)](#)



[Manage Your Mission with Nonprofit Cloud](#)

1:1 Expert Coaching Session
[Use Design Thinking to Achieve Your Project Goals](#)

Are considering hiring a partner (or already have) to complete your Nonprofit Cloud implementation

Register for an
Partner Base Camp Session



[Partner Selection for Implementation](#)



[Find a Nonprofit Consulting Partner](#)



[Implementation Partner Selection Assessment Tool](#)

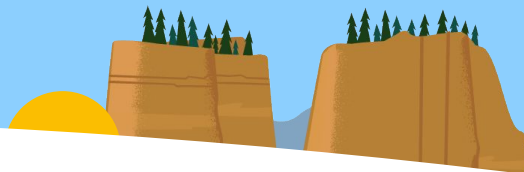
SFDO Excursion
[Vision & Strategy Excursion](#)


Want to connect with other Nonprofits who are using Nonprofit Cloud

Join the Trailblazer Community!

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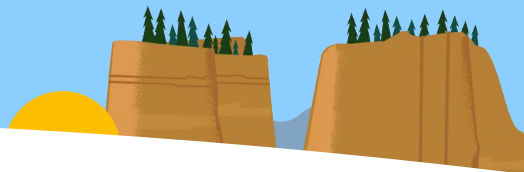
Managing Contacts



If you want to...	Use the Feature	Review Always-on Resources	Access Premier Resources
Maintain your Household records	Merge or Split Households	 Contact and Account Settings in Nonprofit Success Pack	Expert Coaching Video & 1:1 Follow-up Contact and Household Management in NPSP
Keep address information in sync for all contacts in the same household	Preferred Phone and Email	 NPSP How-To Video : Specify Preferred Phone & Email for a Contact	
	Address Management	 Manage Addresses	
Get rid of duplicate contact records	Contact Merge	 Manage Duplicate Contacts and Accounts  NPSP How-To Video: Merge Duplicate Contacts	
Automate address updates, and data standardization	Salesforce.org Insights Platform Data Integrity (\$)	 Meet Insights Platform Data Integrity	Coming soon!
Categorize contacts based on a numerical value (ex: donations, volunteering, or services)	Levels	 Engagement Plans and Levels in Nonprofit Success Pack	1:1 Expert Coaching Session Set Up Levels & Engagement Plans in NPSP
Create a series of tasks to help you engage with your constituents	Engagement Plans		

Resource Guide

Managing Activities



If you want to...

Use the Feature

Review Always-on Resources

Access Premier Resources

Premier
Required

See all of the past and planned touchpoints that your organization has had with a contact, in one place.

[Activity Timeline](#)



[Work with One Record Using Activities, Files, and Notes](#)

Expert Coaching Session
[Platform: Lightning Configuration & Customization](#)

Send and view outbound emails in Salesforce (sent to an individual, or a small group.)

[Record Email](#)
&
[List Emails](#)



[Constituent Email Management with Nonprofit Success Pack](#)



[Send Email to Small Constituent Groups](#)



[Create an Email Template](#)

1:1 Expert Coaching Session
[Use Email Functionality to Engage Nonprofit Constituents](#)

Access your Nonprofit Cloud records anywhere - log meeting details right after they happen.

[Salesforce Mobile](#)



[Salesforce Mobile App Basics](#)



[Salesforce Mobile App Rollout](#)

1:1 Expert Coaching Session
[Salesforce Mobile: Platform Fast Start](#)

Deliver meaningful, scalable experiences to your community, personalized using data from your Nonprofit Cloud instance.

[Marketing Cloud for Nonprofits](#)



[Meet Marketing Cloud Engagement for Nonprofits](#)












[Get to Know Marketing Cloud](#)

Video:
[Marketing Cloud: Feature Overview](#)

Resource Guide

Managing Donations











If you want to...	Use the Feature	Review Always-on Resources	Access Premier Resources
Enter & Acknowledge a single donation from a donor	Create or Edit Donations & Acknowledge Donations by Email	 Donation Management Basics with Nonprofit Success Pack  Configure Acknowledge Donations by Email	 1:1 Expert Coaching Session Nonprofit Success Pack (NPSP) for Fundraising
Easily enter a stack of checks using a single interface	Gift Entry & Gift Entry Batches	 NPSP How-To Series: Create Gift Entry Batches  NPSP How-To Series: Enter Gifts Into Gift Entry Batches	
Track and manage gifts given on a recurring basis	Recurring Donations	 Create Recurring Donations	
Track lifecycle of gifts that are pledged, through their final payment	Pledges & Payments	 Create or Edit Payments  NPSP How-To Series: Manage Multiple-Payments in NPSP	
Collect donations online & automatically create records in Nonprofit Cloud	Elevate	 Salesforce.org Elevate for Fundraising and Advancement	1:1 Expert Coaching Session Best Practices in Online Fundraising with Elevate

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Managing Donations

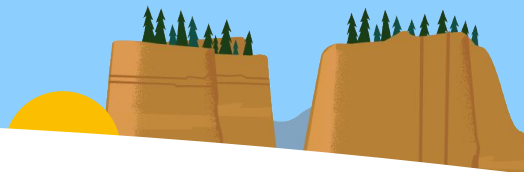


If you want to...	Use the Feature	Review Always-on Resources	Access Premier Resources
Understand a donor's level of influence on donations they didn't make directly	Soft Credits	 Donation Soft Credit Management with Nonprofit Success Pack	1:1 Expert Coaching Session Track Soft Credits in NPSP
Log a Matching Gift received from a donors employer	Matching Gifts	 NPSP How-To Series: Matching Gifts  Configure Matching Gifts  Create Matching Gifts	1:1 Expert Coaching Session Nonprofit Success Pack (NPSP) for Fundraising
Split a single donation among multiple funding buckets	General Allocation Units (GAU) Allocations	 NPSP How-To Series: Create or Modify GAU Allocations  Create and Edit Donation Allocations	
Streamline your moves management strategy to deepen constituent engagement	Levels & Engagement Plans	 Engagement Plans and Levels in Nonprofit Success Pack	1:1 Expert Coaching Session Set Up Levels & Engagement Plans in NPSP
Translate your CRM data revenue into permanent, transparent accounting data	Accounting Subledger (\$)	 Accounting Subledger for Nonprofits and Educational Institutions	Coming soon!

Premier
Required

Resource Guide

Creating Reports











If you want to...	Use the Feature	Review Always-on Resources	Access Premier Resources
Begin with nonprofit specific report templates to use for your NPSP and PMM data	NPSP Reports Workbook & PMM Reports and Dashboards	 Reports and Dashboards with Nonprofit Success Pack  Lightning Experience Reports & Dashboards Specialist	 Expert Coaching Video + 1:1 Follow-up Reports and Dashboards in Nonprofit Success Pack 1:1 Expert Coaching Session Advanced Reports & Dashboards in NPSP
Create a report using fields that aren't shown in a standard report	Custom Report Types	 Next Steps: Reports and Dashboards	
Create visual charts to show the complete picture of your data	Dashboards	 Create and Customize Dashboards	
Receive results of a report/dashboard in your email automatically	Subscribe to Reports	 Share, Schedule, and Subscribe to Reports	
Turn your data into actionable insights	Tableau with NPSP & PMM Tableau Advanced Reporting	 Tableau Basics for Nonprofits  Tableau Desktop: Request donated licenses	1:1 Expert Coaching Session Tableau CRM: Platform Fast Start

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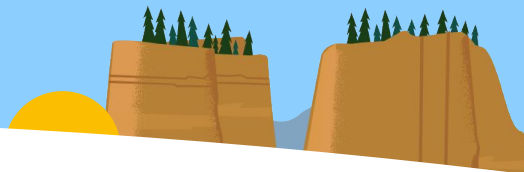
Creating Campaigns



If you want to...	Use the Feature	Review Always-on Resources	Access Premier Resources
Create groups of contacts/leads	Campaigns	 Campaign Management with Nonprofit Success Pack	 1:1 Expert Coaching Session Set Up Campaigns for Nonprofit Fundraising
Easily track ROI by including Opportunity records and costs		 What are Campaigns? Why Would Nonprofits Use Them?	
Create a campaign structure that aligns with your organizations reporting needs	Campaign Hierarchy	 NPSP How-To Series: How to use Campaign Hierarchy  Campaigns for Fundraising Implementation Guide	
Automatically allocate a donation between multiple funds when linked to a specific campaign	Campaign Allocations	 Create and Edit Donation Allocations  NPSP How-To Series: Create or Modify GAU Allocations	
Send emails to groups of people	List Emails	 Send Email to Small Constituent Groups	1:1 Expert Coaching Session Use Email Functionality to Engage Nonprofit Constituents

Resource Guide

Driving Engagement



If you want to...

Use the Feature

Review Always-on Resources

Access Premier Resources

Deliver meaningful, scalable experiences to your community, personalized using data from your Nonprofit Cloud instance.

[Marketing Cloud Engagement for Nonprofits](#) (\$)



[Meet Marketing Cloud Engagement for Nonprofits](#)



[Marketing Cloud for Nonprofits](#)



[Get to Know Marketing Cloud](#)

Video:
[Marketing Cloud: Feature Overview](#)

Premier
Required

Strengthen or build your account-based marketing strategy

[Marketing Cloud Account Engagement](#) (\$)



[Pardot Lightning App Basics](#)

Expert Coaching Video + 1:1 Follow-up
[Pardot: Prepare for Implementation](#)

Manage processes and track results of dispersed grants, scholarships, or other funds

[Outbound Funds](#)



[Outbound Funds Module \(OFM\): Quick Look](#)

Coming soon!

Bring together grantees, funds, and processes in a single place for a better experience.

[Grants Management](#) (\$)



[Manage Grantmaking with Nonprofit Cloud](#)

Deliver connected digital customer experiences and engage more customers.

[Experience Cloud](#) (\$)




[Expand Your Reach with Experience Cloud](#)

1:1 Expert Coaching Session
[Self-Service Experience Fast Start](#)

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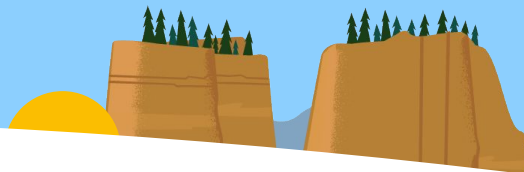
Program Management



If you want to...	Use the Feature	Review Always-on Resources	Access Premier Resources
Track and report on the success of the programs of your nonprofit	Program Management Module (PMM)	 Program Management with Nonprofit Cloud  Map Programs & Services in PMM	<div>Premier Required</div> 1:1 Expert Coaching Session Nonprofit Cloud for Program Management
Deliver programs to organizations (or other non-contact records)	Customize Recipients of Programs and Services		
Quickly log the services delivered to multiple contacts from a single screen	Bulk Service Deliveries	 Service Delivery with Program Management Module	
Easily manage services and attendance for organizations that schedule multiple sessions for a group of pre-enrolled participants (such as class sessions, or ongoing support groups)	Service Schedules		
Begin with report/dashboard templates built specifically to work with PMM data	PMM Reports & Dashboards	 Data Analysis with Program Management Module (PMM)	Expert Coaching Video + 1:1 Follow-up Reports and Dashboards in Nonprofit Success Pack

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Other Program Options



If you want to...

Use the Feature

Review Always-on Resources

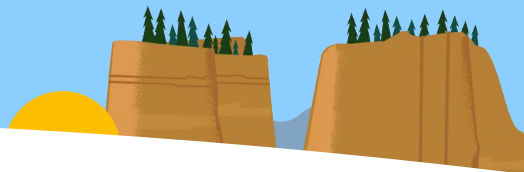
Access Premier Resources


Get the right information at the right time, to keep your clients' needs at the center of your work	<u>Case Management for Human Services</u> (\$)	 <u>Human Services with Nonprofit Cloud Case Management</u>	1:1 Expert Coaching Session <u>Case Management for Human Services</u>
Operate a hotline or service center as part of your nonprofits mission work	<u>Service Cloud</u>	 <u>Use Service Cloud for Nonprofit Client Services</u>	1:1 Expert Coaching Session <u>Service Cloud: Lightning</u>
Recruit and schedule shifts for your volunteers, and give them access to a self-service portal to view and sign up for available shifts	<u>Volunteers for Salesforce</u>	 <u>Manage Volunteers for Nonprofits</u>	1:1 Expert Coaching Session <u>Volunteers for Salesforce</u>
Track grants and other disbursements your organization makes to other nonprofits	<u>Outbound Funds Module</u>	 <u>Compare Grants Management with Outbound Funds Module</u>	Coming soon!
Create a portal where grantseekers can find and apply for funding, view their application status, and submit ongoing progress reports for awarded grants all in one place.	<u>Grants Management</u> (\$)	 <u>Manage Grantmaking with Nonprofit Cloud</u>	

Premier
Required

Resource Guide

Admin Skills



If you want to...	Use the Feature	Review Always-on Resources	Access Premier Resources
Easily add multiple Donation or Services records from a single screen	Batch Gift Entry -or- Bulk Service Deliveries	 NPSP Create or Edit a Gift Entry Template  PMM Customize Bulk Service Deliveries	<div>Premier Required</div> <p>Coming soon!</p>
Import a lot (hundreds or thousands) of donor and donation records into my Nonprofit Cloud instance	NPSP Data Importer	 Get Started: Import Data with NPSP  Import Data With Nonprofit Success Pack (NPSP)  How to Import Data into NPSP More Effectively	<p>1:1 Expert Coaching Session Get Your Data into NPSP</p>
Streamline your users experience by elevating important information and simplifying manual actions	Lightning Pages & Quick Actions	 App Customization Lite  Create Object-Specific Quick Actions  Lightning Experience Customization	<p>1:1 Expert Coaching Session Essential Admin Skills for Nonprofits</p>
Flag potentially duplicate records to address later, or prevent them from being created in the first place	Matching Rules & Duplicate Rules	 Manage Duplicate Contacts and Accounts	<p>1:1 Expert Coaching Session Prevent Duplicates in NPSP</p>
Automate record updates, or creation under certain criteria	Flow	 Flow Concepts: Quick Look  Flow Basics  Flow Builder	<p>1:1 Expert Coaching Session Automating with Salesforce Flow for Nonprofits</p>

Resource Guide

Admin Skills



If you want to...	Use the Feature	Review Always-on Resources	Access Premier Resources
Make incremental upgrades to your system to support changes in your processes or operations	 Customize a Salesforce Object  Nonprofit Success Pack Administration Basics		 1:1 Expert Coaching Session Essential Admin Skills for Nonprofits
Calculate values or transform text from data on the record, or a connected “parent” record	Formula Fields	 Build a Formula Field  Formulas and Validations	
Show a value calculated from the connected “detail” records (ex: Total of all donations, or Number of volunteer shifts)	Roll-up Summary Fields -or- NPSP Customizable Rollups	 Implement Roll-Up Summary Fields  Enable NPSP Customizable Rollups	
Safely make changes in a separate environment where they can be tested before pushing them into your Salesforce instance.	Sandboxes & Change Sets	 Change Set Setup and Configuration  Change Set Development Model	1:1 Expert Coaching Session Sandbox Design
Ensure that only the right people are seeing information in specific records or fields	Application Security	 Security Basics  Data Security	Expert Coaching Video + 1:1 Follow-up Application Security

Resource Guide

Change Management



If you want to...	Discover the Topic	Review Always-on Resources	Access Premier Resources
Make sure that everyone is aligned to ensure the future success of your implementation.	Governance	 Governance Basics	<div>Premier Required</div> <div>Nonprofit Excursion NGO Governance Excursion</div> <div>Expert Coaching Video + 1:1 Follow-up Getting Started: Governance</div>
Connect your vision to technical solutions and illustrate the potential impact of a digital transformation.	Vision & Strategy	 Prepare for Success with Nonprofit Cloud	<div>Nonprofit Excursion NGO Vision & Strategy Excursion</div> <div>Expert Coaching Video + 1:1 Follow-up Getting Started: Governance: Vision and Strategy</div>
Learn how to manage sustainable change in your organization	Change Management	 LEVERS of Change Framework	<div>Nonprofit Excursion NGO Change Management Excursion</div> <div>Expert Coaching Video + 1:1 Follow-up Getting Started: Governance: Change Management</div>