

Donor Engagement Bolt for Nonprofits

Bolt Version 1.0

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Installation

Prerequisites

1. Ensure [My Domain](#) is enabled in your org.
2. Ensure communities are enabled in your org.
Note: If you do not see “Communities Settings” in Setup, please contact your Account Executive.
3. Ensure Chatter is enabled in your org.
4. Salesforce.org Nonprofit Success Pack (NPSP) must be installed.

Installing the Package

Note: Installing and testing in a sandbox org first is highly recommended.

1. On the AppExchange listing, click on the “**Get it Now**” button.
2. Verify your credentials.
3. Agree to the Terms of Service.
4. Click on the “**Confirm and Install**” button.



Install Donor Engagement Bolt for Nonprofits

By MembershipFundraisingLB



What if existing component names conflict with ones in this package?

☒ Do not install.

☐ Rename conflicting components in package.

☐ Install for Admins Only

☒ Install for All Users

☐ Install for Specific Profiles...

Install

Cancel

1. In the top section, click on the “Do not install” radio button to select it.
2. Click on the “Install for All Users” radio button to select it
3. Click on the “Install” button.

Recommended Security Settings

Sharing Settings

Recommended Organization-Wide Default settings:

Object	Default External Access
Account, Contract, and Asset	Private
Contact	Private
Opportunity	Private
Recurring Donation	Private

Profiles

We recommend following best practices and clone your standard community profile(s).

Object Level Security

The following object-level security settings are recommended for your Community profile(s):

Object	CRED
Account	Read, Create, Edit
Addresses	Read, Create, Edit
Contact	Read, Edit
Opportunity (Partner Community Only)	Read
Recurring Donation	Read

Field Level Security

The following field-level security settings are recommended for your Community profiles(s):

Object	Field Name	CRED
Recurring Donation	Total Paid Amount	Read
Recurring Donation	Date Established	Read
Recurring Donation	Installment Amount	Read

Object	Field Name	CRED
Recurring Donation	Installment Period	Read
Recurring Donation	Next Donation Date	Read
Recurring Donation	Payment Method	Read
Opportunity	Amount	Read
Opportunity	Gift Date	Read
Contact	Name	Read
Contact	Salutation	Read
Contact	Phone	Read
Contact	Email	Read
Contact	Personal Email	Read
Contact	Work Email	Read
Contact	Alternate Email	Read
Contact	Preferred Email	Read
Contact	Mailing Address	Read
Contact	Home Address	Read
Contact	Mobile	Read
Contact	Work Phone	Read
Contact	Other Email	Read
Contact	Preferred Phone	Read
Contact	Email Opt Out	Read, Edit
Contact	Do Not Call	Read, Edit
Contact	Do Not Contact	Read, Edit

Apex Class Access

Ensure the following classes are added to the profile(s) Apex Class Access:

- ContactRedirectController
- ContactUsFormController
- CustomListViewController

Page Layouts

Ensure your profile(s) has/have the Community Contact Layout as their page layout assignment.

Sharing Sets

To establish a shared data relationship to the necessary data sets, sharing sets need to be created or existing sets updated, depending on your system settings.

Sharing Sets		New
Action	Sharing Set	
Edit Del	Donor Community	

1. To configure sharing sets, select “**Communities Settings**” from Setup.
2. Create a new sharing set by clicking on the “**New**” button or edit an existing sharing set by clicking on the “**Edit**” Action next to the desired Sharing Set.

SETUP

Sharing Set Settings | **Share Group Settings**

Sharing Set Edit [Save] [Cancel]

Label:

Sharing Set Name: ⓘ

Description:

Select Profiles

Available Profiles		Selected Profiles
External Apps Plus Login User	Add ▶	Partner Community User - Custom
Customer Portal Manager		Customer Community User - Custom
Authenticated Website	Remove ◀	
Partner User		
Customer Community Plus Login User		
High Volume Customer Portal		
External Apps Plus User		
External Apps User		
Customer Community Plus User		
External Apps Login User		
High Volume Customer Portal User		
Silver Partner User		
Authenticated Website		
Gold Partner User		

1. Enter the **"Label"** name for the sharing set that you will be assigning to your Community users.
2. Navigate to the **"Select Profiles"** section.
3. From within the **"Available Profiles"** list, select the profile(s) that will be assigned to your Community users and add them to the **"Selected Profiles"** list.
4. Navigate to the **"Select Objects"** section.
5. From within the "Available Objects" list, select **"Contact"**, **"Opportunity"**, and **"Recurring Donation"** and add them to the **"Selected Objects"** list.
6. After selecting these objects, you will see three lines in the "Configure Access" section below.

Select Objects

Search for: Find

Available Objects

- Account
- Batch
- Campaign
- Case
- DEPRECATED-Fund
- DEPRECATED-Relationship Error
- DEPRECATED-Schedulable
- Engagement Plan Template
- Error
- Form Template
- GAU Allocation
- General Accounting Unit
- Household
- Individual

Selected Objects

- Recurring Donation
- Opportunity
- Contact

Add Remove

Configure Access

Action	Object	Access Determined By	Access Level
Set Up Del	Contact	None	None
Set Up Del	Opportunity	None	None
Set Up Del	Recurring Donation	None	None

- Click on the **“Set Up”** action next to each object line and configure them as follows.

Contact

Access Mapping for Contact

Grant access where

User (Account)

Matches

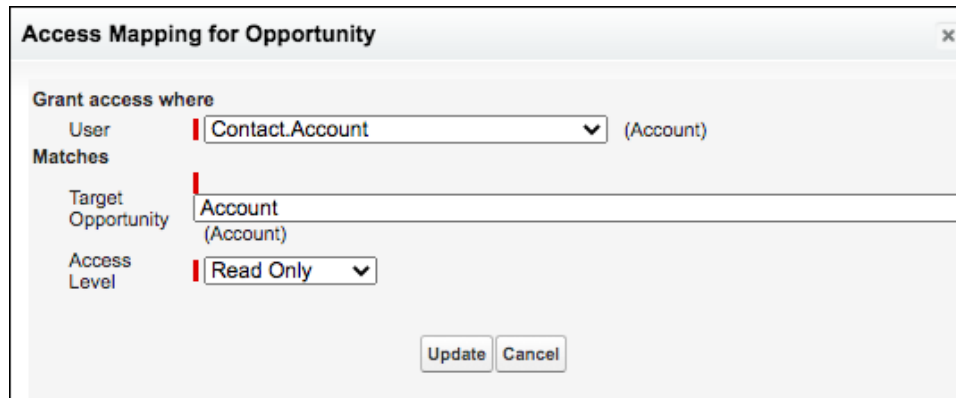
Target Contact (Account)

Access Level

Update Cancel

- In the **“User”** field, select **“Contact.Account”** from the picklist.
- In the **“Target Contact”** field, select **“Account”** from the picklist.
- In the **“Access Level”** field, select **“Read/Write”** from the picklist.
- Click on the **“Update”** button.

Opportunity



Access Mapping for Opportunity

Grant access where

User: (Account)

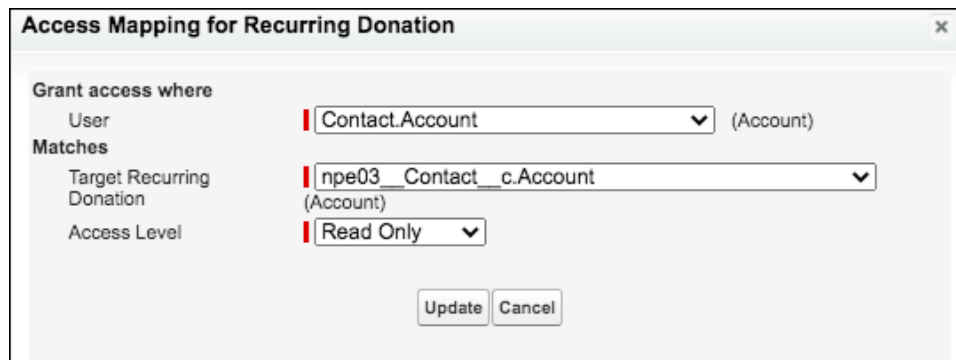
Matches

Target Opportunity: (Account)

Access Level:

- In the “**User**” field, select “**Contact.Account**” from the picklist.
- In the “**Target Opportunity**” field, select “**Account**” from the picklist.
- In the “**Access Level**” field, select “**Read Only**” from the picklist.
- Click on the “**Update**” button.

Recurring Donation



Access Mapping for Recurring Donation

Grant access where

User: (Account)

Matches

Target Recurring Donation: (Account)

Access Level:

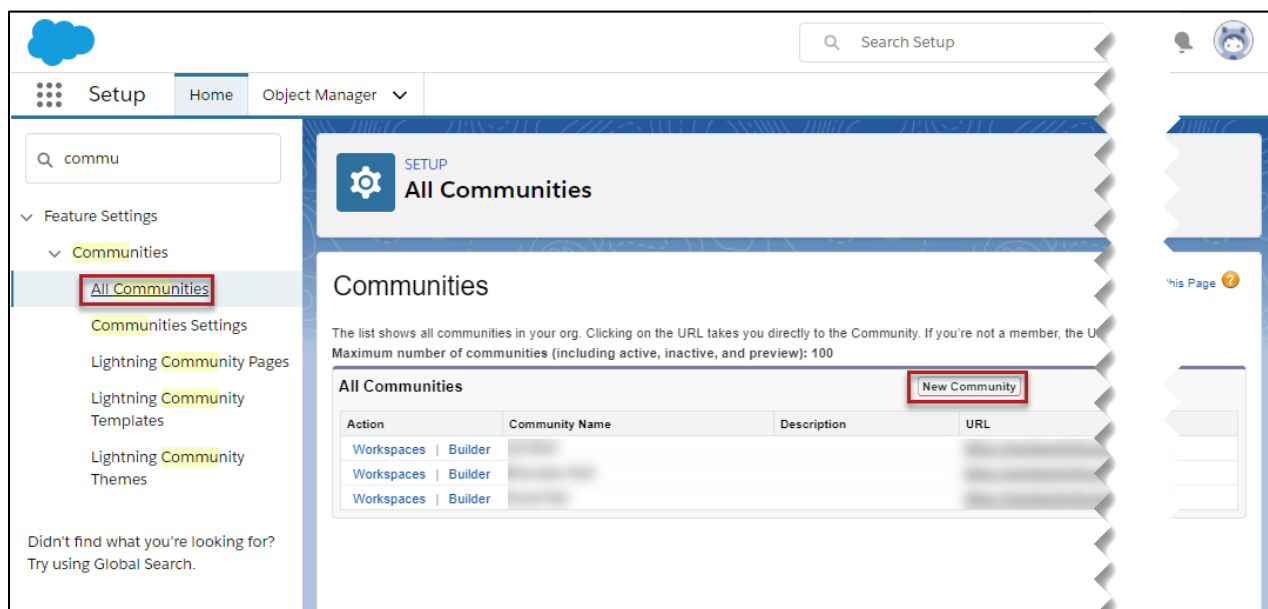
- In the “**User**” field, select “**Contact.Account**” from the picklist.
 - In the “**Target Recurring Donation**” field, select “**npe03__Contact__c.Account**” from the picklist.
 - In the “**Access Level**” field, select “**Read Only**” from the picklist.
 - Click on the “**Update**” button.
- Click on the “**Save**” button.

Applying the Donor Engagement Bolt for Nonprofits to a Community

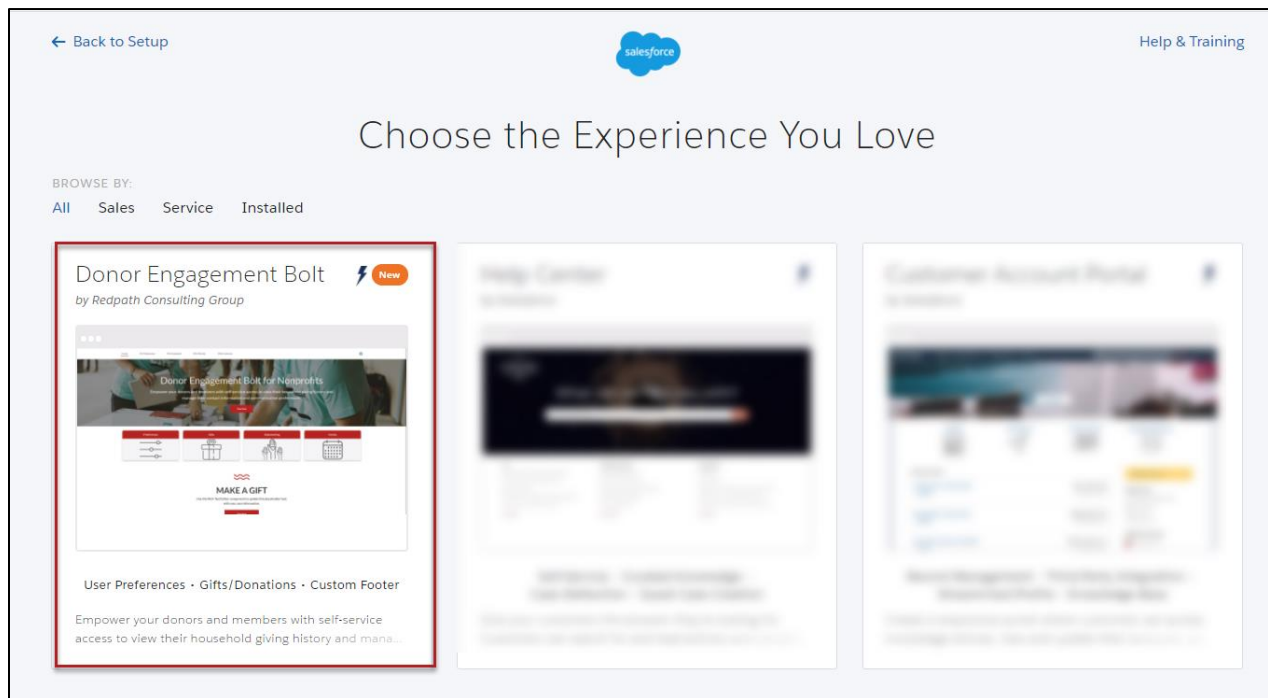
The Donor Engagement Bolt needs to be added to a new or existing community.

CAUTION: *If you have an existing community with custom pages and content created, you should not use the Donor Engagement Bolt Template as this will permanently delete all of your custom pages. Instead, we recommend that you use our provided components to build out the additional features that you need.*

Creating a New Community

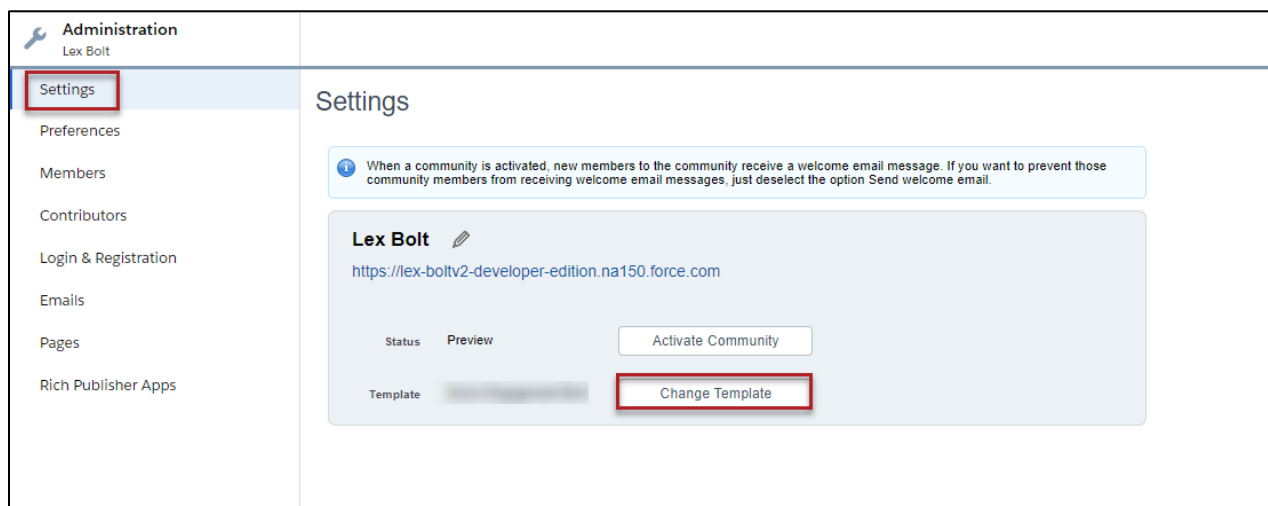


1. To use the Donor Engagement Bolt for Nonprofits with a new Community, go to your system “**Setup**”.
2. Navigate to “**All Communities**”.
3. Click on the “**New Community**” button.
4. Select the **Donor Engagement Bolt** theme.



1. Click **“Get Started”**.
2. Enter a **“Name”** for your community.
3. Click **“Create”**.

Applying the Donor Engagement Bolt Template to an Existing Community



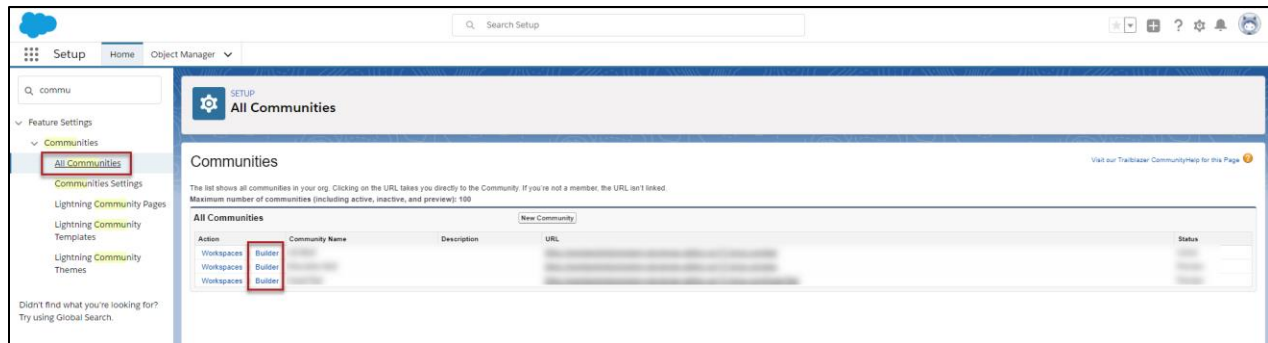
4. If you would like to apply the template to an existing community, select **“Workspaces”** -> **“Administration”** -> **“Settings”** to change the template.

CAUTION: If you have an existing community with custom pages and content created, you should not use the Donor Engagement Bolt Template as this will permanently delete all of your custom pages. Instead, we recommend that you use our provided components to build out the additional features that you need.

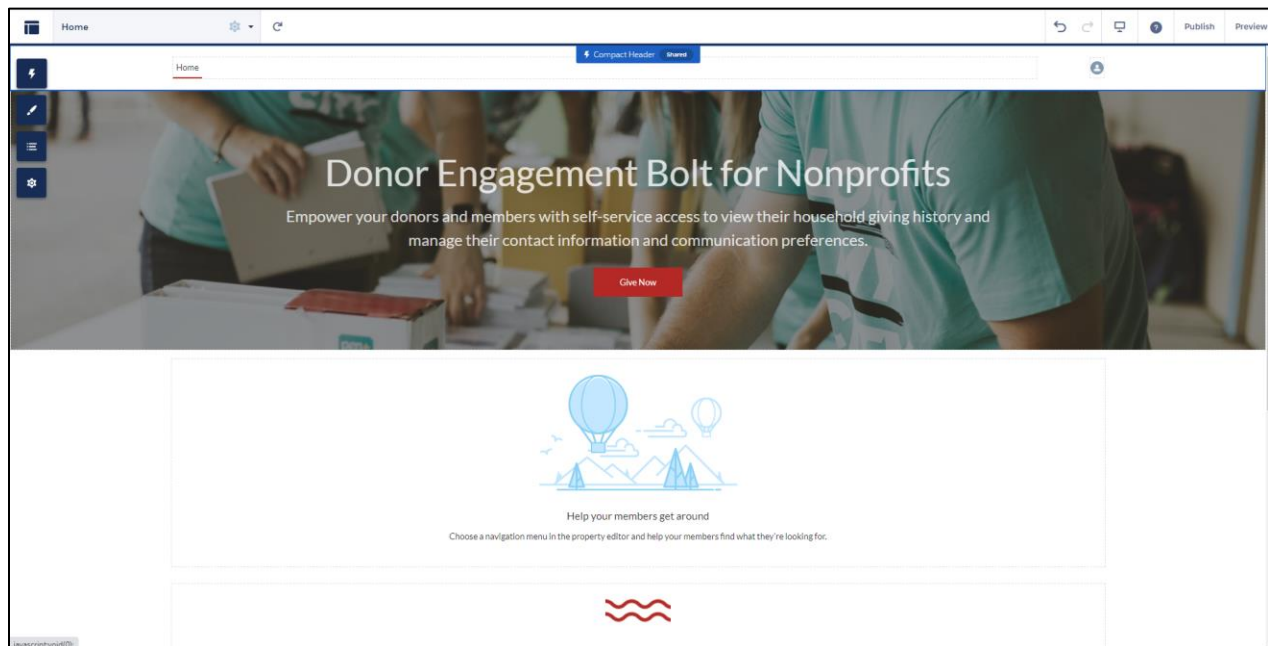
5. Click on the **“Change Template”** button.
6. Click on the **“Donor Engagement Bolt”** to select it.

Configuring the Community

After adding the Donor Engagement Bolt to your Community, it needs to be configured.

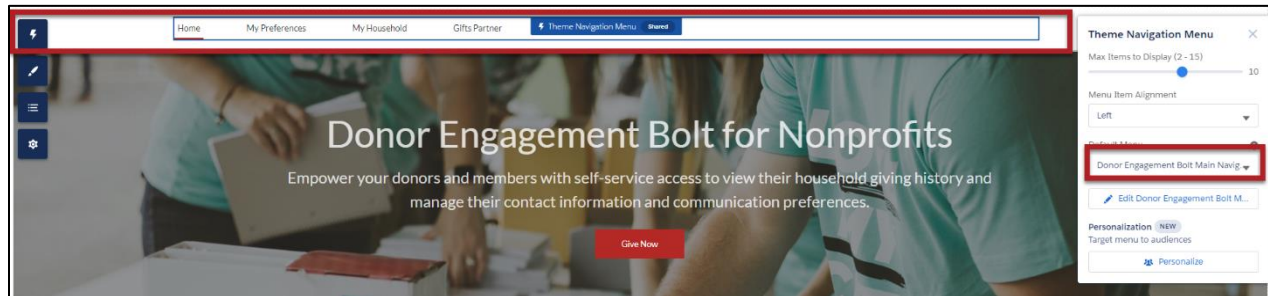


1. If you have not done so already, open the Community Builder of the Community you have the Bolt installed in.



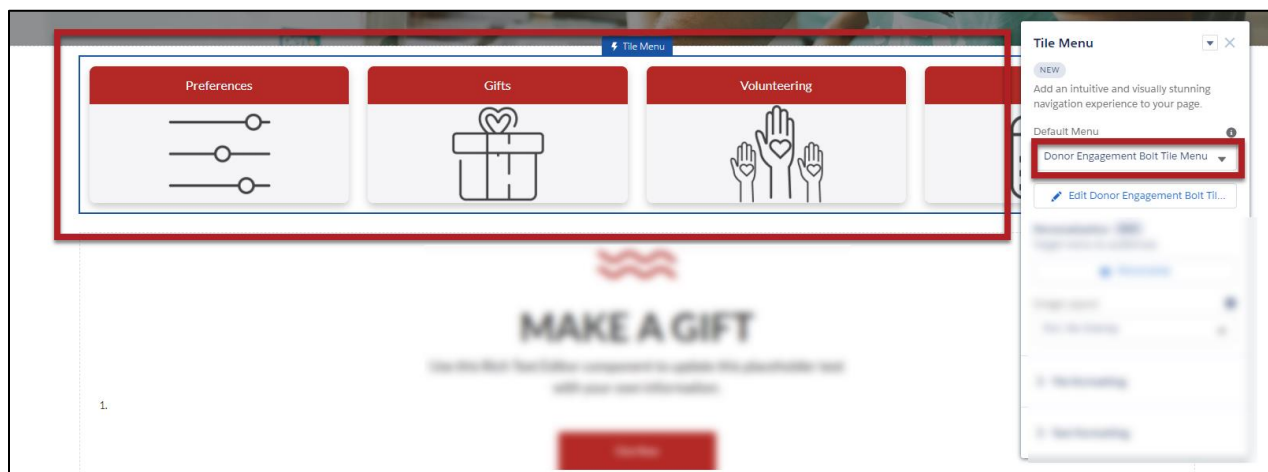
2. Once in the builder, you should see this screen.

Changing the Theme Navigation Menu



1. Click on the **Theme Navigation Menu** section located near the top of the page.
2. From the dialog window, select “**Donor Engagement Bolt Main Navigation**” as the “**Default Menu**” field option.

Changing the Tile Menu



1. Click on the **Tile Menu** section located in the middle of the page.
2. From the dialog window, select “**Donor Engagement Bolt Tile Menu**” as the “**Default Menu**” field option.

Remove Duplicate Gifts Pages

If your community serves both Customer and Partner users, you will need to add audiences to the “**Gifts Partner**” and “**Gifts Customer**” pages. Follow the guidance provided in the Salesforce help document titled, “[Manage Audiences in Communities](#)”.

If your community only serves Customer users, remove the “Gifts Partner” page from the navigation.

If your community only serves Partner users, remove the “Gifts Customer” page from the navigation.

Note: Ensure to change the Navigation Menu name from “Gifts Partner” and “Gifts Customer” to just “Gifts”. The default name is to help you get started while building the community.

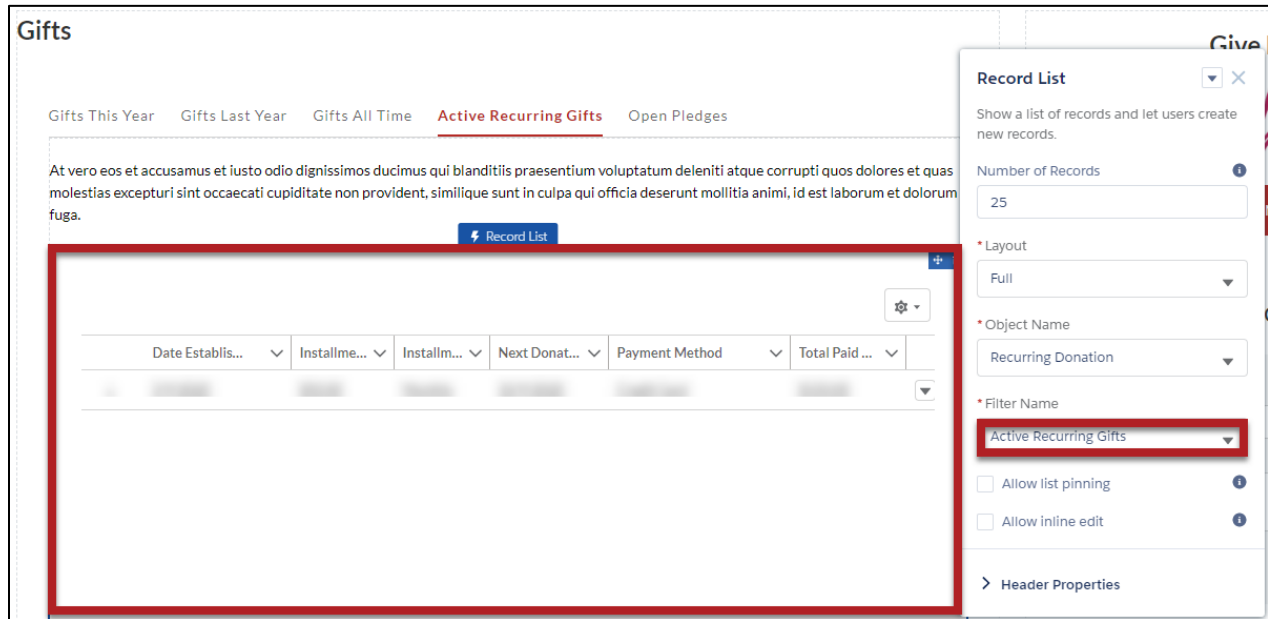
Configure the Household Contact List

The screenshot shows the 'My Household Contacts' page. A red box highlights the 'Record List' dialog box. The dialog box has a search bar and a table with columns: Name, Salutation, Phone, and Email. The 'Filter Name' dropdown is set to 'Household Contacts'. Other settings include 'Number of Records' (25), 'Layout' (Full), 'Object Name' (Contact), and checkboxes for 'Allow list pinning' and 'Allow inline edit'. A 'Header Properties' link is at the bottom.

	Name	Salutation	Phone	Email
1	[Redacted]	[Redacted]	[Redacted]	[Redacted]
2	[Redacted]	[Redacted]	[Redacted]	[Redacted]
3	[Redacted]	[Redacted]	[Redacted]	[Redacted]
4	[Redacted]	[Redacted]	[Redacted]	[Redacted]

1. Navigate to the “**Household Contacts**” page.
2. Click on the **Records List** section located in the center of the page.
3. From the dialog window, select “**Household Contacts**” as the “**Filter Name**” field option.

Configure the Gifts Customer List Views



1. Navigate to the “**Gifts Customer**” page.
2. Click on the **Active Recurring Gifts** section located in the center of the page.
3. Select “**Record List**”.
4. From the dialog window, select “**Active Recurring Gifts**” as the “**Filter Name**” field option.

Configure the Gifts Partner List Views

1. Navigate to the “Gifts Partner” page.

Note: Each tab has a different list view that needs to be updated as noted below:

Gifts This Year

2. Click on the “**Gifts This Year**” tab
3. Select “**Record List**”.
4. From the dialog window, select “**Gifts This Year**” as the “**Filter Name**” field option.

Note: Opportunities that show up on this list meet the following criteria:

IsWon = TRUE and CloseDate = THIS_YEAR

Gifts Last Year

5. Click on the “**Gifts Last Year**” tab
6. Select “**Record List**”.
7. From the dialog window, select “**Gifts Last Year**” as the “**Filter Name**” field option.

Note: Opportunities that show up on this list meet the following criteria:

IsWon = TRUE and CloseDate = LAST_YEAR

Gifts All Time

8. Click on the “**Gifts All Time**” tab
9. Select “**Record List**”.
10. From the dialog window, select “**Gifts All Time**” as the “**Filter Name**” field option.

Note: Opportunities that show up on this list meet the following criteria:

IsWon = TRUE

Active Recurring Gifts

11. Click on the “**Active Recurring Gifts**” tab
12. Select “**Record List**”.
13. From the dialog window, select “**Recurring Donation**” as the “**Filter Name**” field option.

Note: Opportunities that show up on this list meet the following criteria:

Open Ended Status != FALSE

Open Pledges

14. Click on the “**Open Pledges**” tab
15. Select “**Record List**”.
16. From the dialog window, select “**Open Pledges**” as the “**Filter Name**” field option.

Note: Opportunities that show up on this list meet the following criteria:

IsClosed = FALSE

Add your Company Logo

1. Navigate to your Community Administration.
2. Select “**Login and Registration**”.
3. Add your company logo to the “**Logo File**”.

Configure Custom Components

EB Contact Redirect

The Donor Engagement bolt places the InfoContact Us Form on the following pages.

- Household Contacts
- Gifts Partner
- Gifts Customer
- Contact Detail

Required Configuration: Recipient Email Address

Configure these forms with the email you would like to receive any messages submitted through this form. To learn more about the configuration options of this form, view the “**Custom Component Documentation**” below.

EB Button

The bolt places the “**EB Button**” on the following pages.

- Home
- Household Contacts
- Gifts Partner
- Gifts Customer
- Contact Detail

Configure these buttons to direct users to your giving portal. To learn more about configuring buttons, view the “**Custom Component Documentation**” below.

EB Footer

Changes made to the footer will be reflected across the entire community, since we are using this component in the **Template Footer** section.

All default values should be updated in this component to match your organization’s information. To learn more about configuring the footer, view the “**Custom Component Documentation**” below.

Add Custom CSS

The custom css is not required. We use this css in our Bolt Demo to style the hero section, tabs and list views.

```
/*The hero image displays on all pages of the community -- this is so that a user does not need to reconfigure the footer twice. To hide the Hero on all pages except for the Home Page, include the following code.*/
```

```
.comm-page-home .hero {
    display: inline; /*Shows the hero on the Home Page*/
}

.hero {
    display: none; /*Hides the hero*/
}

/*This forces the footer to the bottom of the view.*/

.siteforceContentArea {
    min-height: 62vh; /*Hides the hero*/
}

/*At the time of writing this, communities do not allow for an option to
remove the My Account and Profile menu items*/

.myAccount.uiMenuItem{
    display: none; /*Hides the My Account menu item.*/
}

.profile.uiMenuItem{
    display: none; /*Hides the Profile menu item.*/
}

/*Adds padding and a slight border radius to the record list tabset.*/
.forceCommunityRecordListDesktop, .forceCommunityTabset {
    padding: 20px 30px 20px 30px;
    border-radius: 5px;
}

/*Hides some unnecesary information from the list view.*/
force-list-view-manager-status-info{
    display: none;
}

.mruScopeHeader{
    display: none;
}

/*Hides some unnecesary information from the list view.*/
.forceListViewManagerHeader > .slds-grid:first-child{
    display: none;
}
```

Custom Components Documentation

EB Contact Redirect

The Contact Redirect component can be placed on a custom community page. When a user navigates to the page that this component is on, they will be redirected to their own Contact record. The Donor Engagement Bolt for Nonprofits includes a custom page named “Contact Redirect,” which includes this component. “My Preferences” in the navigation menu points to this page.

Note: End users will never see the redirect page, as it will immediately redirect them to their Contact record.

It is recommended that you do not place the Contact Redirect component on any other pages in your Community. If you need to configure any links to navigation items to direct users to their Contact record, use the existing “Contact Redirect” page.

Note: When in the builder, the Contact Redirect component will not redirect, instead a message will be displayed.

EB Contact Us Form

The Contact Us Form is a custom component that can be placed on any page in your Community. This form allows a community user to fill out a subject and message that gets emailed to a specified email address. Upon submitting the form, the community user will see a success or error message indicating that their form was successfully submitted or not.

The component has the following configuration options:

Option	Description
Border Radius	Must be entered as a pixel value (e.g. 10px). Used to define whether the corners of the gray area are rounded or square. The higher the number, the more rounded the corners. Default is 10px.
Margin	Must be entered as a pixel value (e.g. 10px). Used to define how much space
Padding	Must be entered as a pixel value (e.g. 10px). Used to define how much space. Follows CSS syntax.
Recipient Email Address	Required. Enter the email address that should receive an email when a user submits the Contact Us Form.
Success Message	This is the message that will appear to a user after they successfully submit the Contact Us Form.
Error Message	This is the message that will appear to a user if there is an error when they attempt to submit the Contact Us Form.

EB Footer

Use the Footer component to add a custom footer to your community. For the footer to appear on every page within your Community, the Footer component should be placed in the Template Footer section of any page.

The component has the following configuration options:

Option	Description
Link 1 Text	The text that appears for the first link. If this is left blank, the first link will be hidden.
Link 2 Text	The text that appears for the second link. If this is left blank, the second link will be hidden.
Link 3 Text	The text that appears for the third link. If this is left blank, the third link will be hidden.
Link 4 Text	The text that appears for the fourth link. If this is left blank, the fourth link will be hidden.
Link 1 URL	The URL for the first link. Can be entered with any valid URL format (e.g. salesforce.com, https://salesforce.com, https://www.salesforce.com)
Link 2 URL	The URL for the second link. Can be entered with any valid URL format (e.g. salesforce.com, https://salesforce.com, https://www.salesforce.com)
Link 3 URL	The URL for the third link. Can be entered with any valid URL format (e.g. salesforce.com, https://salesforce.com, https://www.salesforce.com)
Link 4 URL	The URL for the fourth link. Can be entered with any valid URL format (e.g. salesforce.com, https://salesforce.com, https://www.salesforce.com)
Logo URL	The URL for the company logo. Can be entered with any valid URL format (e.g. salesforce.com, https://salesforce.com, https://www.salesforce.com). If left blank, the company logo will not be clickable.
Twitter URL	The URL for the Twitter icon. Can be entered with any valid URL format (e.g. salesforce.com, https://salesforce.com, https://www.salesforce.com). If left blank, the Twitter icon will be hidden.

Option	Description
Facebook URL	The URL for the Facebook icon. Can be entered with any valid URL format (e.g. salesforce.com, https://salesforce.com, https://www.salesforce.com). If left blank, the Facebook icon will be hidden.
YouTube URL	The URL for the YouTube icon. Can be entered with any valid URL format (e.g. salesforce.com, https://salesforce.com, https://www.salesforce.com). If left blank, the YouTube icon will be hidden.
Instagram URL	The URL for the Instagram icon. Can be entered with any valid URL format (e.g. salesforce.com, https://salesforce.com, https://www.salesforce.com). If left blank, the Instagram icon will be hidden.
LinkedIn URL	The URL for the LinkedIn icon. Can be entered with any valid URL format (e.g. salesforce.com, https://salesforce.com, https://www.salesforce.com). If left blank, the LinkedIn icon will be hidden.
Custom URL 1	The URL for the first custom icon. If left blank, the first custom icon will be hidden.
Custom URL 2	The URL for the second custom icon. If left blank, the first custom icon will be hidden.
Custom URL 3	The URL for the third custom icon. If left blank, the first custom icon will be hidden.
Background Color	Background color of the top section of the component.
Border Color	Color of the top border line of the component.
Company Name	Text that appears next to the copyright date in the lower section of the component. Note that the copyright year will always reflect the current year.
Copyright Background Color	Background color for the lower section of the component.
Copyright Text Color	Text color for the text in the lower section of the component.

Social Icons

Edit Del	Bolt_Footer_SocialIcon_Youtube	image/png
Edit Del	Bolt_Footer_SocialIcon_Twitter	image/png
Edit Del	Bolt_Footer_SocialIcon_Linkedin	image/png
Edit Del	Bolt_Footer_SocialIcon_Instagram	image/png
Edit Del	Bolt_Footer_SocialIcon_Facebook	image/png
Edit Del	Bolt_Footer_SocialIcon_Custom3	image/png
Edit Del	Bolt_Footer_SocialIcon_Custom2	image/png
Edit Del	Bolt_Footer_SocialIcon_Custom1	image/png

The social icons included with the package include the following: Facebook, Twitter, Instagram, LinkedIn, and YouTube. These icons are Static Resources and are named **“Bolt_Footer_SocialIcon_Facebook”**, **“Bolt_Footer_SocialIcon_Twitter”**, and so on. If you would like to use your own icons instead of the ones provided, you simply need to replace the file with the same file format and naming convention in the static resource.

Static Resource
Bolt_Footer_SocialIcon_Facebook

Static Resource Detail

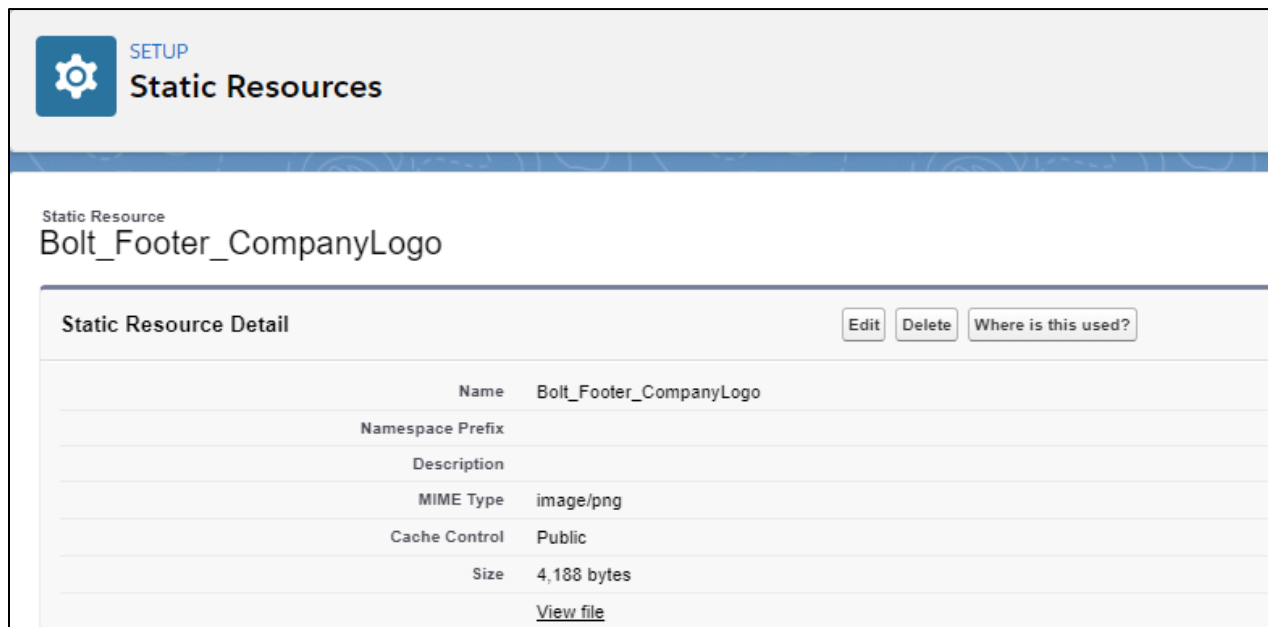
[Edit](#)
[Delete](#)
[Where is this used?](#)

Name	Bolt_Footer_SocialIcon_Facebook
Namespace Prefix	
Description	
MIME Type	image/png
Cache Control	Private
Size	6,040 bytes
	View file

Also included in the component is the ability to add up to three custom icons. As placeholders, duplicates of the Facebook icon have been added, but can be replaced with whatever fits your needs.

Company Logo

The company logo is also a static resource called **“Bolt_Footer_CompanyLogo”**. To replace the default logo with your own, simply replace the file in the static resource using the same file format and naming convention.



EB Gift List View

The Gift List component can be used instead of the standard opportunity list view which also provides users with a Customer Community license access to a custom view of opportunities.

Feature	Description
List View To Display	There are 4 available list views to choose from: • Gifts This Year - Opportunities where the CloseDate is this year and IsWon is true. • Gifts Last Year - Opportunities where the CloseDate is last year and IsWon is true. • Gifts All Time - Opportunities where IsWon is true. • Open Pledges - Opportunities where IsClosed is FALSE.
Default Sort Direction	The direction the 'Sort By' field sorts in. DESC or ASC.
Sort By (Field API Name)	The field that the table will be sorted by.
Column Labels	The column labels. By default these are set to "Donor", "Amount", and "Gift Date".

EB Button

The Simple Button component is a button that you can set the color, text, link, and behavior of.

Feature	Description
Button Text	The text that shows on the button.
Button URL	The URL you would like to direct the user to. <i>Note: If “Does this URL redirect to another page within this community?” is selected, only the page name needs to be included.¹</i>
Does this URL redirect to another page within this community?	If you are linking to a page within your community, this should be checked. ²
Should this link open in a new tab?	If checked, the button will open the URL in a new tab.
Button Alignment	Button alignment options include: • Center • Left • Right

EB Button

Button Text

Give Now

Button URL

preferences

☒ Does this URL redirect to another page within this community?

☒ Should this link open in a new tab?

Button Alignment

Center

EB Button

Button Text

Give Now

Button URL

redpathcg.com

☐ Does this URL redirect to another page within this community?

☒ Should this link open in a new tab?

Button Alignment

Center

Internal

External

¹ **External redirects** – As an example, if you would like the button to redirect to your external website you can simply put the URL in the “Button URL” input.

² **Community redirects** – As an example, if you would like the button to redirect to the “Preferences Page” go to the preferences page settings and copy the value under the URL input. In this case, “preferences”. Then copy this input into the Simple Button component’s URL attribute. (See image below.)

The screenshot shows the 'Preferences' page configuration interface. On the left, a sidebar titled 'Pages' contains a search bar and a list of pages: Home, Contact Support, Create Record, Error, Events, Generic (Object), Gifts, Login, My Account, News (Content), News, Opportunity (Object), Preferences (selected), Search, User Settings, and Volunteering. At the bottom of the sidebar is a '+ New Page' button. The main panel on the right is titled 'Preferences' and has two tabs: 'PROPERTIES' and 'PAGE VARIATIONS'. The 'PROPERTIES' tab is active and contains the following fields:

- Name:** Preferences
- URL:** / preferences
- API Name:** Preferences__c
- Page Access:** Community Default Setting: Requires Login
- SEO:**
 - Title:** Preferences
 - Description:** Page description that can appear in search engine results.
 - Meta Tags:** Edit Meta Tags
- Layout:** (dropdown menu)

At the bottom right of the main panel is a 'Delete Page' button with a trash icon.