

# Salesforce NonProfit Success Pack

by

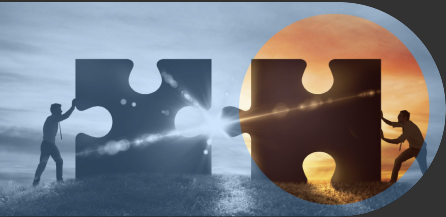




**Digitools  
Consulting +  
Salesforce =  
Ensuring Your  
Success**



# Our Vision



We have established Digttools Consulting Customer Experience Center of Expertise (CoE) to help customers redefine the way they engage with employees, suppliers, and customers. The goal is to reimagine the customer journey to create attractive experiences that can drive brand loyalty and increase customer lifetime value.

## **INTEGRATED SUCCESS FRAMEWORK**

Creating a clear value proposition and offerings on the top of Salesforce.com as a platform, to deliver to the customer, across various industries.

## **EXPERTISE**

Having a solid team of experts across various areas part of Digttools Consulting CX Center of Expertise EMEA to work with our customers of different sizes across all the products.

## **INDUSTRIES**

Enhancing our industry expertise with use cases covering full complete cycles of a specific function.

## **COMPLETENESS**

Delivering complete value through the vast solutions in Salesforce.com ecosystem and the AppExchange, while creating our own solutions on top of Force.com.

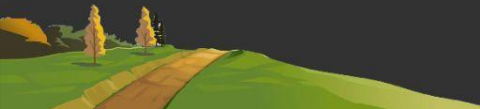
# About Us



We are a consulting and technology firm. We craft custom cloud-based software and digital solutions for enterprises.

Our objective is always to create remarkable value for our clients (and their customers) by leveraging cloud and mobile technology, digital media, the internet, and the talent of our people.

- ❑ We understand your business and design Salesforce according to your business process to increase usability and automate the process.
- ❑ Our rich experience of 7 years in digital helps us understand your business needs, target market, and consumer behavior. Let us help you achieve your business goals by applying marketing strategies with a practical approach.



# What We'll Deliver

## A Line of Sight to Digital Transformation



### VISION

A vision of the future aligned to your business goals and the needs of your key constituents



### Blueprint and Value Map

A business case quantifying the benefits, impact, and value of transformation

Key Benefit Areas			
Goal & Objective	Key Capabilities & Features	Impact	Value
Goal 1: Improve customer experience	Key Capability: Personalized content delivery, AI-driven recommendations, omnichannel consistency	Impact: Higher conversion, reduced churn, faster resolution	Value: Increased revenue, lower costs
Goal 2: Streamline internal operations	Key Capability: Automated workflows, data integration, self-service portals	Impact: Reduced manual tasks, faster processing, lower error rates	Value: Operational efficiency, cost savings
Goal 3: Enhance data security and compliance	Key Capability: Advanced encryption, access controls, audit trails, regulatory reporting	Impact: Reduced risk, faster incident response, regulatory compliance	Value: Risk mitigation, trust building



### Voyage & Roadmap

The voyage we will take together to achieve your goals and create impact





## Administration

Admin on Demand, Support quote for recurring activities.

## Migration

Classic to Lightning Conversion,  
Data migration from miscellaneous  
sources

## Optimization

Customizing, Automation  
And Integration

## Application Life Cycle

Project Life cycle Management,  
Requirement Management,  
Business Process Analysis &  
re-engineering, Custom  
Development, Testing,  
Release, Support

# Our Approach

Life Cycle  
Management

## Testing

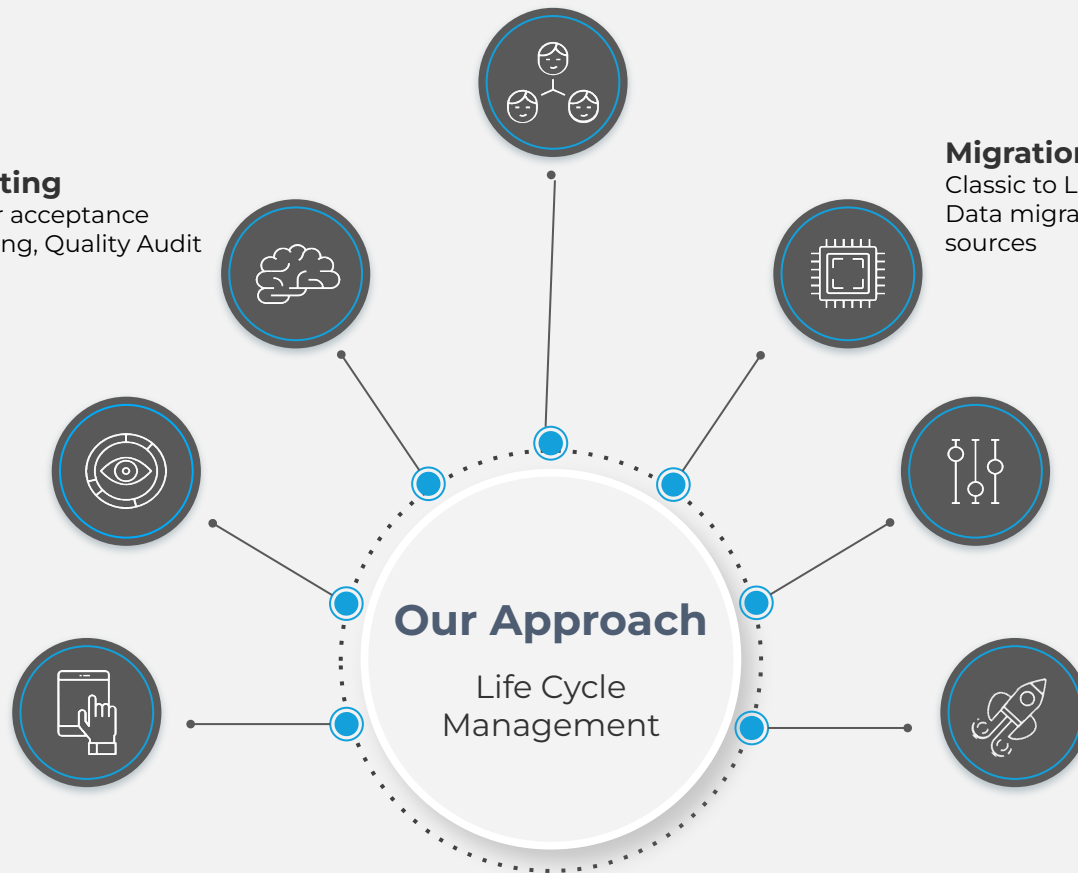
User acceptance  
testing, Quality Audit

## Training

User training, Power  
training and administrator  
training

## Mobile Apps

Development of new  
apps, Integration of third  
party apps



# NonProfit Success Pack Cloud



NPSP is built on top of the Salesforce CRM platform and provides nonprofit organizations with a custom-tailored version of Salesforce that includes features such as donation management, grant management, volunteer management, and program management.

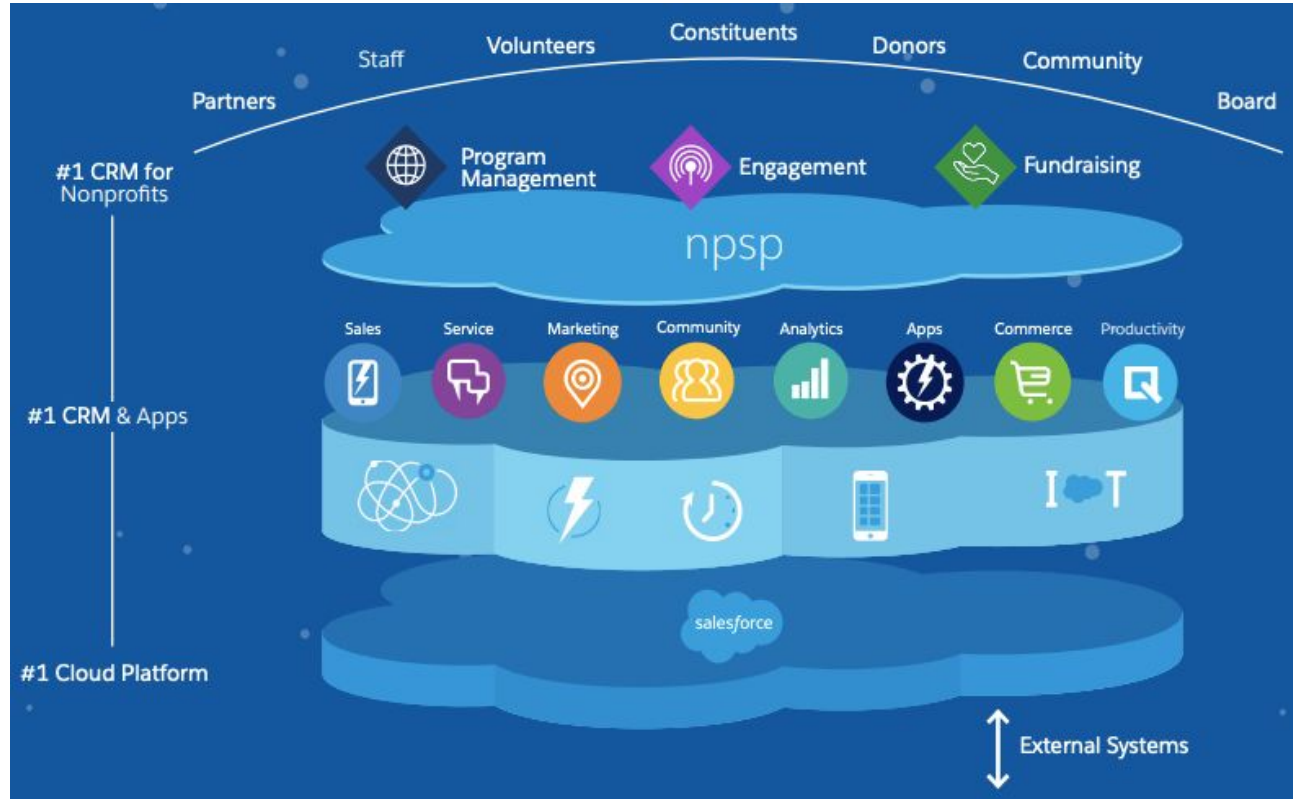
- ➔ Fundraising Management
- ➔ Grant Management
- ➔ Volunteer Management



# NPSP Data Structure



NPSP builds upon the standard Salesforce data model and introduces additional objects and relationships tailored for nonprofit operations. It is designed to support the unique needs of non Profit organizations.





# Common Problems of NonProfit Organizations



Limited Resources



Manual Processes



Lack of insight into their operations and impact



Inefficient data management



# Features of NonProfit Success Pack

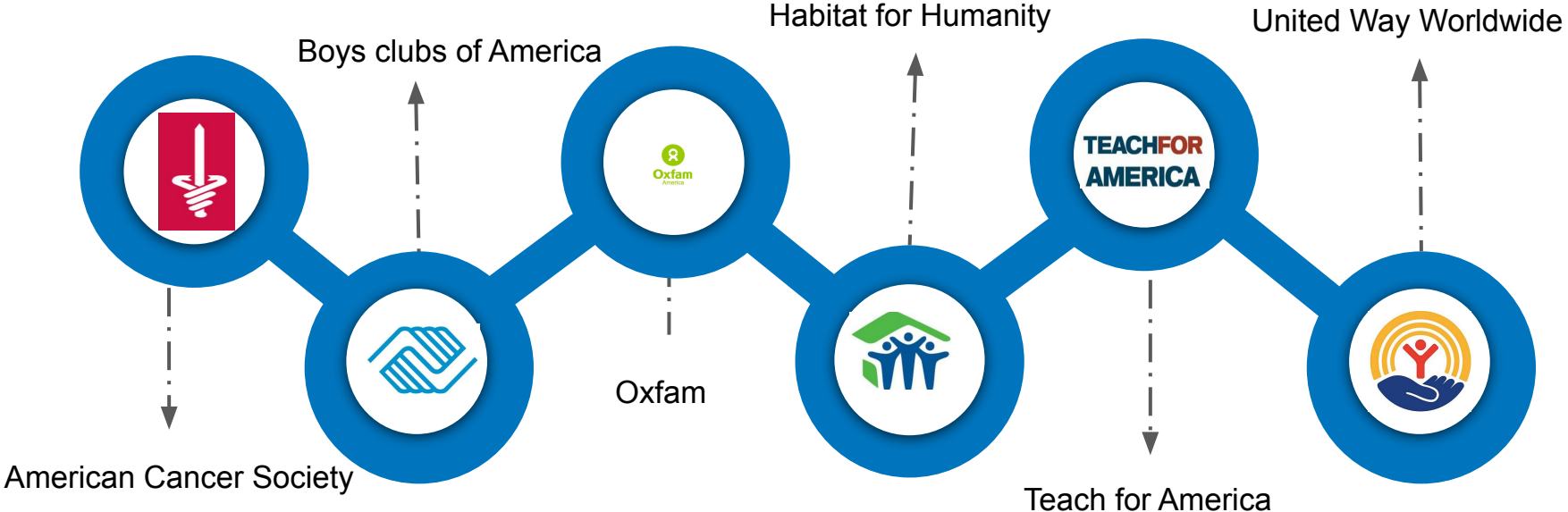
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- ➔ Donor Management
- ➔ Fundraising Management
- ➔ Volunteer Management
- ➔ Reporting and Analytics



# Companies using NPSP



# New Membership Journey

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## Account

Converted Leads which store Organization information



## Contact

Store information about member



## Affiliated Contacts

To capture information about individuals who are associated with the accounts



## Opportunity

Create Opportunity of membership Record type and this can store membership fee



## Recurring Donation

Donation is given automatically repeated at regular intervals



## Payment

Store transactions that have been processed by nonprofit organization

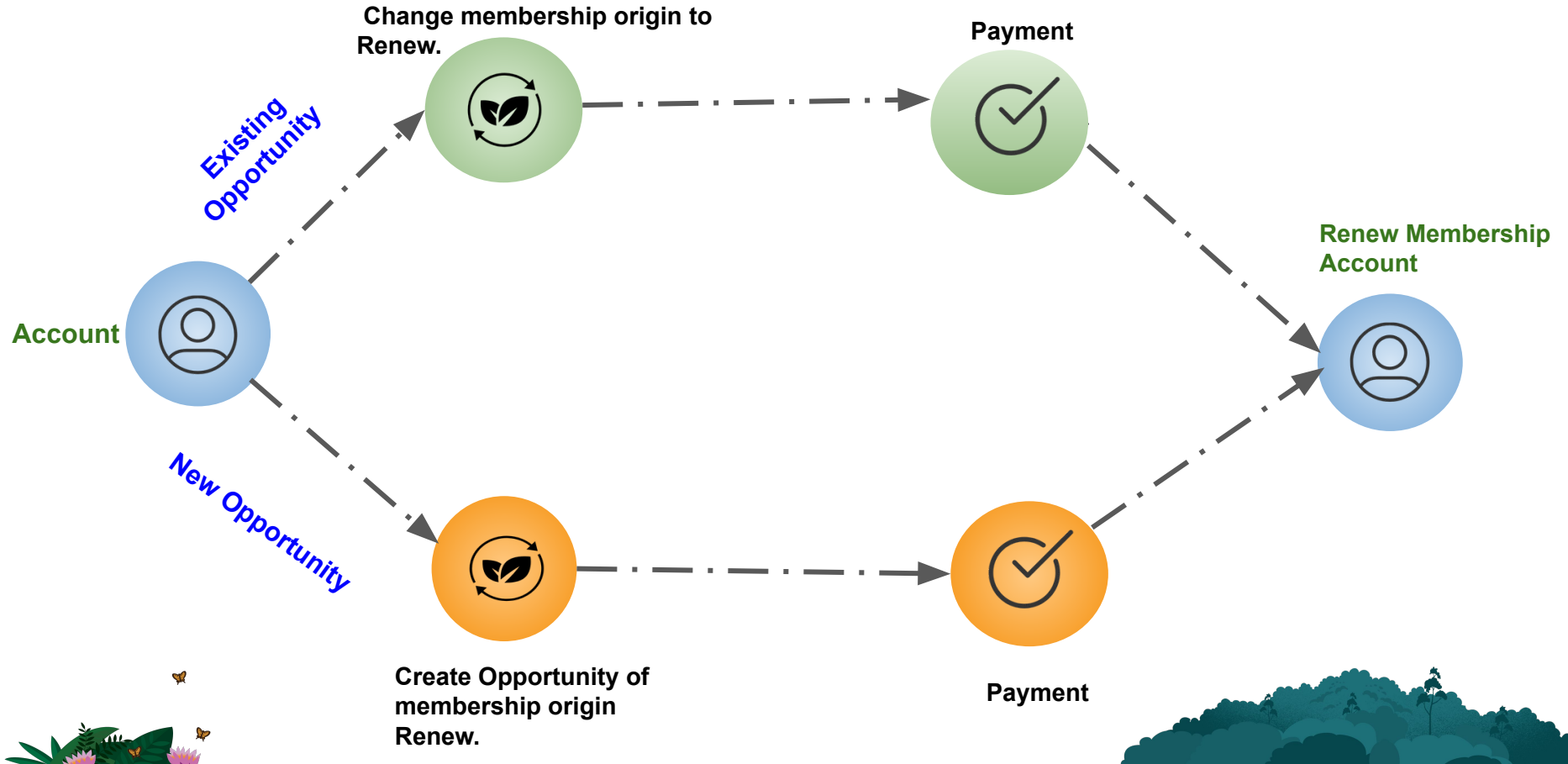


## Leads

Capture information of interested Member



# Renew Membership Journey



# Recurring Donation

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**User Input**

This User 'pedro' participated in one of events and he's going to send us a cheque worth \$500 on the 20th of every month.



**Salesforce**

RD Name - Pedro RD  
Contact : Pedro  
Account : Gomez  
Established Date:10/12/2019  
Amount:\$500  
Payment Period :Monthly  
Day of Month : 20  
Payment Method : Cheque

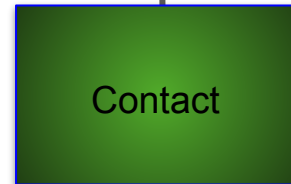
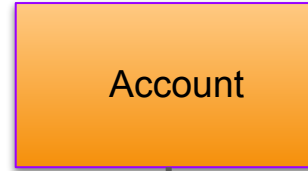


# Affiliation

➔ The Affiliation object is used to establish and manage relationships between Accounts and Contacts within a nonprofit organization.

➔ It allows you to track various types of affiliations or connections between individuals and organizations.

➔ The Affiliation object enables you to associate multiple Contacts with the same Account



Establish and manage relationships between Accounts and Contacts



# GAU Allocations

GAU Allocation are used to track the distribution of funds.



Opportunity

GAU Allocations



Efficiently allocate funds from a source GAU to multiple destination GAUs

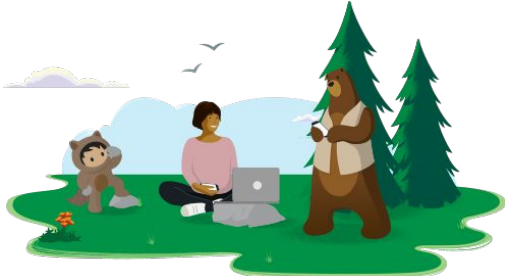
Manage allocations



Funds are assigned in different general accounting unit



Assigned in different General accounting Units





# Community Sites

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- ❖ Community sites includes user profiles that allow members to create a personal profile, including their name, photo, and contact information.
- ❖ Many community sites include discussion forums where users can ask questions, share knowledge, and exchange ideas with other members.

Partner Community

Customer Community

Collaboration and  
Communication

Account  
Management

Data Sharing

Community  
Engagement



# Refund Donation Payments



## Associate Negative Payment with Opportunity

Original Opportunity Amount : \$500  
Negative Payment Amount: -\$100

## Update Opportunity Amount

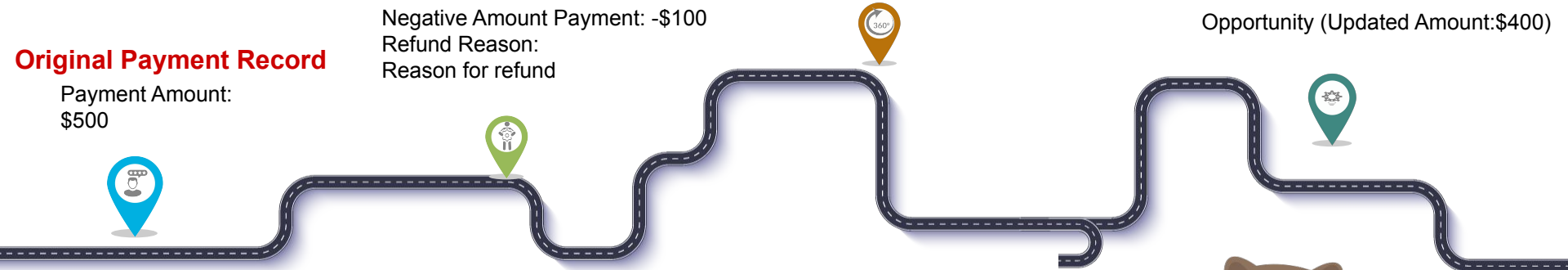
Opportunity (Updated Amount:\$400)

## Refund Process

Negative Amount Payment: -\$100  
Refund Reason:  
Reason for refund

## Original Payment Record

Payment Amount:  
\$500





# Thank you. Let's Connect!



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