

salesforce

# Nonprofit Cloud Recommendation Map

Follow this path to achieve your goals

Last update: October 2022



# Your Success Starts Here

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This document provides a step-by-step guide of recommended resources that lead you from a beginner to advanced Salesforce user. Follow the suggested path of resources to learn how to implement, realize value, grow, and go further with Salesforce.

Welcome and good luck on your journey.



# Implement: Get Started

Begin your journey to success



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LINK TO MASTER

# Implement: Get Started




1

Get to Know Nonprofit Cloud


[Follow This Trailmix](#)

WEBINAR

[Nonprofit Cloud Base Camp: Welcome Session](#)


Get oriented with Nonprofit Cloud and learn how it can help nonprofits meet their missions.

TRAILHEAD

[Manage Your Mission With Nonprofit Cloud](#)


Meet the Salesforce technology built for nonprofits.

COMMUNITY

[Nonprofit Hub in the Trailblazer Community](#)

A public group for anyone interested in how nonprofits are using Salesforce for social good.

COMMUNITY

[Salesforce.org Nonprofit Events](#)


Stay informed on events run by the Salesforce.org Events Team.

2

Prepare for Implementing Nonprofit Cloud


[Follow This Trailmix](#)

TRAILHEAD

[Prepare for Success with Nonprofit Cloud](#)


Set goals and learn the best practices for implementing Nonprofit Cloud.

TRAILHEAD

[Nonprofit Cloud Learning Resources Quicklook](#)

Map your learning journey with educational tools and resources for Nonprofit Cloud.

WEBINAR

[Nonprofit Cloud Base Camp: Best Practices for Working with a Partner Session](#)


Learn best practices for working with an implementation partner.

3

Learn About Nonprofit Success Pack (NPSP)


[Follow This Trailmix](#)

ARTICLE

[NPSP: Feature Configuration Overview](#)

Learn what features come with NPSP.

ARTICLE

[Getting Started with NPSP: Planning Guide](#)


Before you begin customizing features, take a moment to review the recommendations in this guide.

4

Learn Program Management Module (PMM)


[Follow This Trailmix](#)

TRAILHEAD

[Manage Programs with Nonprofit Cloud](#)

Improve your service delivery with Salesforce for Nonprofits.

WEBINAR

[Nonprofit Cloud Base Camp: Implementing PMM](#)

Learn key PMM concepts to help you successfully implement this tool for your organization





# Implement: Get Started, cont.



5

Learn About Marketing with Nonprofit Cloud


[Follow This Trailmix](#)

TRAILHEAD

[Engage Constituents with Nonprofit Cloud](#)

Develop and maintain impactful relationships with your clients and supporters.

GUIDE

[Marketing Cloud Recommendation Map](#)

Follow this path to achieve your Marketing Cloud goals.

6

Set Up Nonprofit Success Pack (NPSP)


[Follow This Trailmix](#)

INDIVIDUAL COACHING SESSION Pr

[Getting Started: Contact and HH Management in NPSP](#)

Learn the principles of contact and household management, relationship management, and address management.

ARTICLE

[Customize Household Names](#)


How to customize household names and greetings.

ARTICLE

[Customize Opportunity \(Donation\) Names](#)


Create your own custom opportunity names using fields from the opportunity or related records.

ARTICLE

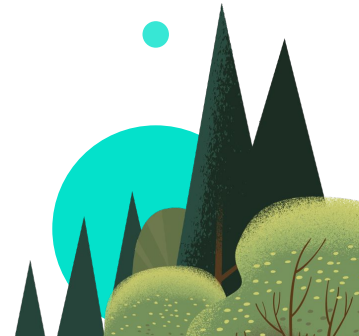
[Enable Default Donation Allocation \(General Accounting Unit\)](#)

Enable a default GAU if you want Salesforce to allocate opportunities to a GAU upon creation.

TRAILHEAD

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

Learn the basics for implementing Nonprofit Success Pack.



# Implement: Get Started, cont.



7

Get Data into Nonprofit Success Pack (NPSP)


[Follow This Trailmix](#)

TRAILHEAD

[Import Data With NPSP](#)


Learn to use NPSP Data Importer to bring data from outside sources into Salesforce.

WEBINAR

[Let NPSP Help You Get Your Data Into Salesforce \(Basic\)](#)

How to get your data into Salesforce quickly using NPSP Data Importer, Gift Entry, and Partial Soft Credits.

WEBINAR

[Let NPSP Help You Get Your Data Into Salesforce \(Advanced\)](#)

Learn how to customize NPSP Gift Entry templates and use Advanced Mapping to add custom objects and fields.

INDIVIDUAL COACHING SESSION

[Getting Started: Get Your Data Into NPSP](#)

Learn how to import client or donor data into Salesforce using the NPSP Data Import Utility.

8

Set Up Program Management Module (PMM)

[Follow This Trailmix](#)

ARTICLE

[PMM Documentation](#)

List of Salesforce.org Program Management Module documentation.

INDIVIDUAL COACHING SESSION

[Getting Started: Nonprofit Cloud for Program Management](#)

Learn how to measure and manage your programs using Program Management Module from a Salesforce expert.



# Implement: Drive Use

Learn to leverage key functionality and increase user adoption



# Drive Use



1

Boost Productivity  
with NPSP  
Features

[Follow This Trailmix](#)

TRAILHEAD



[Productivity in  
Nonprofit Success  
Pack](#)

Learn new tools to work more  
efficiently and boost your  
organization's impact.

TRAILHEAD



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

Learn how to manage email to  
individuals and small groups more  
efficiently.

INDIVIDUAL COACHING SESSION

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[How to Use Email  
Functionality to Engage  
Constituents](#)

Learn the many ways Salesforce can  
be used to send email to individuals  
and groups.

INDIVIDUAL COACHING SESSION

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[How to Manage  
Activities in NPSP](#)

Understand the breadth of features  
available to help drive productivity at  
your nonprofit.

2

Enhance Admin  
Skills

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INDIVIDUAL COACHING SESSION

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[Getting Started:  
Essential Admin Skills  
for Nonprofits](#)

Learn essential skills to maintain  
data security and quality in your  
Salesforce org.

ARTICLE



[Getting Started:  
Training Path for a  
Salesforce Sys Admin](#)

Resources for becoming a Salesforce  
Admin Trailblazer.

INDIVIDUAL COACHING SESSION

Pr



[How to Prevent  
Duplicates in NPSP](#)

Learn how to create duplicate rules,  
use NPSP Contact Merge, and  
configure duplicate management  
reports.



Requires Premier or Signature Success Plan



Additional Investment



Fundraising



Program Management



Marketing & Engagement






# Drive Use for Fundraising



1

Raise Funds with NPSP Features for Fundraising

[Follow This Trailmix](#)

INDIVIDUAL COACHING SESSION Pr

[Getting Started: NPSP for Fundraising](#)

Learn how to set up and configure key features of NPSP for your nonprofit.

TRAILHEAD

[Fundraise with Nonprofit Cloud](#)

Learn how to manage donors and donations with Nonprofit Success Pack and Salesforce.

INDIVIDUAL COACHING SESSION Pr

[How to Set Up Campaigns for Nonprofit Fundraising](#)


Learn best practices for setting up campaigns.

INDIVIDUAL COACHING SESSION Pr

[How to Set Up Levels and Engagement Plans](#)


Create tasks and group constituents automatically with engagement plans and levels.

INDIVIDUAL COACHING SESSION Pr

[How to Track Income in NPSP](#)

Learn how to track and manage income from multiple sources in NPSP.

INDIVIDUAL COACHING SESSION Pr

[How to Track Soft Credits in NPSP](#)

Learn how to use soft credits to better understand a donor's history and level of influence.



# Drive Use for Program Management



1

Learn Program Management Module (PMM)



[Follow This Trailmix](#)

TRAILHEAD



[Program Management with Nonprofit Cloud](#)

Track and optimize your services with the Program Management Module.



Requires Premier or Signature Success Plan



Additional Investment



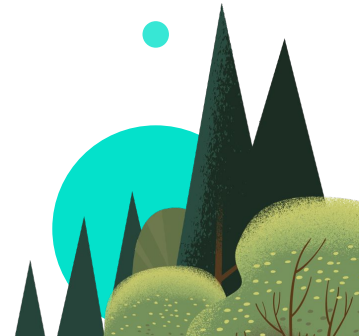
Fundraising



Program Management



Marketing & Engagement



# Drive Use for Marketing & Engagement



1

Drive Use for Marketers

Follow This Trailmix

INDIVIDUAL COACHING SESSION Pr

[How to Set Up Social Studio for Nonprofits and Higher Ed](#)

Learn best practices for success with Social Studio.

VIDEO

[Getting Started: Marketing Cloud: Feature Overview](#)

In this video, explore Marketing Cloud features and get a quick health check on features you already use.



# Realize Value

Achieve peak performance



# Realize Value

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## 1 Reports and Dashboards

[Follow This Trailmix](#)

WEBINAR

Pr



[Insights: Reports and Dashboards in NPSP](#)

Learn best practices for using standard report types and tools available in Report Builder.

VIDEO



[Insights: Reports and Dashboards in NPSP](#)

Learn best practices for using standard report types and tools available in Report Builder.

TRAILHEAD



[Reports and Dashboards with Nonprofit Success Pack](#)

Harness the power of data to tell the story of your organization's impact.

INDIVIDUAL COACHING SESSION

Pr



[Insights: Advanced Reports and Dashboards in NPSP](#)

Learn how to take your organization's reports and dashboards to the next level.

## 2 Maintain a Healthy Salesforce Org

[Follow This Trailmix](#)

INDIVIDUAL COACHING SESSION

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[Org Health for Nonprofit Cloud](#)

Learn how to check your system's overall health and get recommendations on how to improve it.

WEBINAR



[Strong Admin, Strong Org: Data Quality Toolkit](#)

Learn practical tips to center data quality at your nonprofit.

WEBINAR



[Assess Your Org with Salesforce Optimizer App](#)

Get to know Salesforce Optimizer app and how it can help keep your org healthy.

WEBINAR



[Strong Admin, Strong Org: Create a Helpdesk Ticketing System with Flow](#)

Walk through building a ticketing system with Salesforce Flow.

BLOG



[How to Document Inside Your Salesforce Instance](#)

Learn how to document your Salesforce setup and customizations.

ARTICLE



[Healthy Org Workbook](#)

Use this interactive workbook to stay on top of your org health.

INDIVIDUAL COACHING SESSION

Pr



[Use Design Thinking to Achieve Your Project Goals](#)

Learn how to develop or improve your Salesforce processes through the lens of Design Thinking.



Requires Premier or Signature Success Plan



Additional Investment



Fundraising



Program Management



Marketing & Engagement




# Realize Value for Fundraising




1

Tableau and AI


[Follow This Trailmix](#)

TRAILHEAD

[Tableau Basics for Nonprofits](#)


Use interactive dashboards to surface insights for fundraising, programs, and engagement.

TRAILHEAD

[Einstein for Nonprofits: Quick Look](#)

Explore how your organization can use predictive scoring to boost fundraising.

ARTICLE

[Salesforce.org Einstein for Nonprofits](#)

List of Salesforce.org Einstein for Nonprofits product documentation.



# Grow and Go Further

Achieve greater success using advanced features



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# Grow



## 1 Automation and Flow

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### INDIVIDUAL COACHING SESSION

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#### [How to Automate with Salesforce Flow for Nonprofits](#)

Learn how to set up and configure key business processes within a sandbox environment using Salesforce Flow.

### TRAILHEAD



#### [Project: Build a Donor Email Flow for Nonprofit Success Pack \(NPSP\)](#)

Create a flow to help users quickly send templated gift acknowledgment emails to donors.

## 2 Leverage the Salesforce Ecosystem

[Follow This Trailmix](#)

### ARTICLE



#### [Keep Up with Salesforce.org Releases](#)

Understand how the Salesforce release cycle works.

### COMMUNITY



#### [Nonprofit Release Readiness](#)

Stay current with the latest Nonprofit Cloud release information.

### COMMUNITY



#### [Nonprofit Cloud Certification](#)

Take your Nonprofit Cloud knowledge to the next level by getting certified.



Requires Premier or Signature Success Plan



Additional Investment



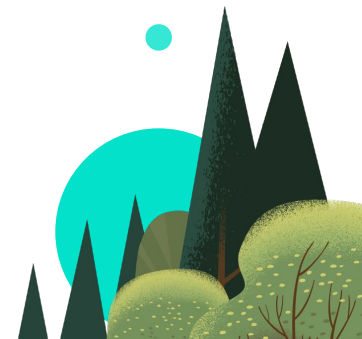
Fundraising



Program Management



Marketing & Engagement




# Grow for Fundraising




1

Align Accounting Data


[Follow This Trailmix](#)

TRAILHEAD

[Accounting Subledger for Nonprofits and Educational Institutions](#)

Translate your CRM data revenue into permanent, transparent accounting data.


ARTICLE

[Accounting Subledger Documentation](#)


List of Salesforce.org Accounting Subledger product documentation.

2

Online Fundraising


[Follow This Trailmix](#)

TRAILHEAD

[Fundraise with Salesforce.org Elevate](#)


Learn how to collect and process donations with Salesforce.org Elevate.

ARTICLE

[Elevate Documentation](#)

List of Salesforce.org Elevate product documentation.


INDIVIDUAL COACHING SESSION

[Getting Started: Best Practices in Online Fundraising with Elevate](#)


Learn best practices for online fundraising and donation forms from a Salesforce expert.

3

Manage Donor Data


[Follow This Trailmix](#)

ARTICLE

[Salesforce.org Insights Platform Data Integrity](#)

List of Salesforce.org Insights Platform product documentation.

TRAILHEAD

[Salesforce.org Insights Platform Data Integrity: Quick Look](#)

Discover how to automatically keep your contact data clean and up to date.



# Grow for Program Management

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## 1 Case Management



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### TRAILHEAD



#### [Human Services with Nonprofit Cloud Case Management](#)

Streamline day-to-day tasks and improve client service with Nonprofit Cloud.

### ARTICLE



#### [Nonprofit Cloud Case Management Documentation](#)

List of Salesforce.org Case Management product documentation.

### INDIVIDUAL COACHING SESSION

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#### [Getting Started: Case Management for Human Services](#)

Learn how to track client engagements from a Salesforce expert using Nonprofit Cloud Case Management.

## 2 Manage Volunteers



[Follow This Trailmix](#)

### TRAILHEAD



#### [Manage Volunteers for Nonprofits](#)

Use Volunteers for Salesforce to manage events, communicate via your website, and report on participation.

### ARTICLE



#### [Volunteers for Salesforce \(V4S\) Documentation](#)

List of Salesforce.org V4S product documentation.

### INDIVIDUAL COACHING SESSION

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#### [Getting Started: Volunteers for Salesforce \(V4S\)](#)

Learn how to successfully set up V4S.

## 3 Grantmaking



[Follow This Trailmix](#)

### TRAILHEAD



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

Explore data architecture to track grants and other nonprofit disbursements.

### ARTICLE



#### [Outbound Funds Module](#)

List of Outbound Funds Module product documentation.

### TRAILHEAD



#### [Grants Management with Salesforce](#)

Manage the lifecycle of grants and drive impact.

### ARTICLE



#### [Grants Management](#)

List of Grants Management product documentation.

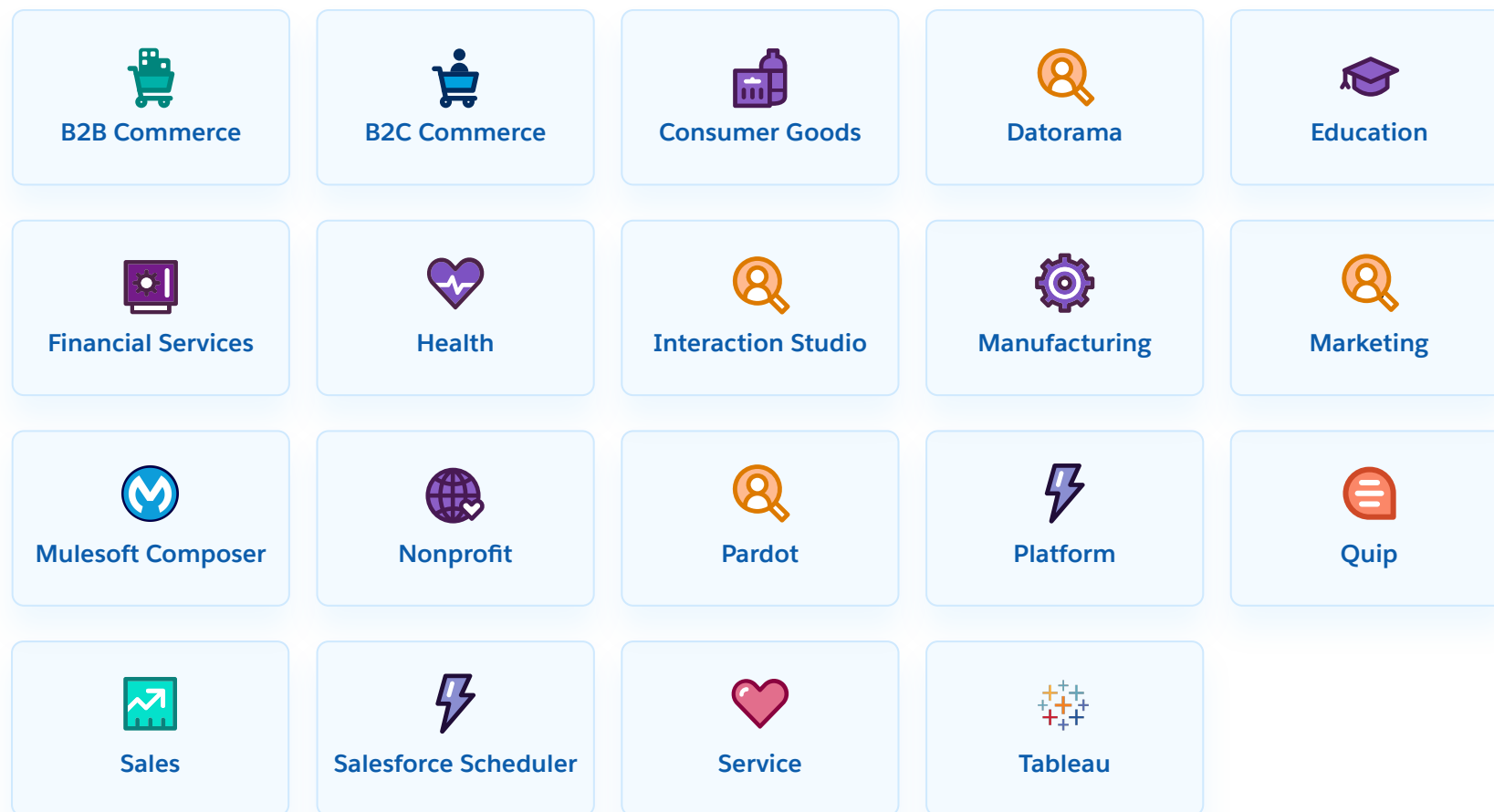


# Reach the Summit of Success

Get more resources to help you meet your goals. Explore Recommendation Maps for additional clouds.

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Thank You