Nonprofit Cloud Implementation Guide

Manage Your Stakeholders and Constituents

Winter '25

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Guide Overview

Nonprofit Cloud (NPC) is a solution built into the core Salesforce platform with tools for fundraising, program management, case management, grants management and outcome management. Launched in 2023, this product is part of the Salesforce for Industries suite of products. It leverages features and components built by other Salesforce Industries to address common, complex business scenarios.

Nonprofit Cloud is a separate product from Salesforce's managed package products (such as the Nonprofit Success Pack, or NPSP). If you're familiar with NPSP, it's important to know that NPC is structured *completely* differently from NPSP. Implementing NPC without context or preparation might be challenging. Learn more about the process of migrating from NPSP to Nonprofit Cloud with the Nonprofit Cloud Migration Guide.

This guide is meant to provide an overview of Nonprofit Cloud features and implementation strategies to individuals responsible for implementing Nonprofit Cloud for an organization. It will provide an introduction to the key concepts implementers need to understand to set up Nonprofit Cloud successfully. We'll share questions to consider, best practices, and tips to help you on the implementation journey.

We recommend implementers review the entire guide before starting the implementation. When you know the basics of Nonprofit Cloud, you can move on to the next part of the project. Use the technical documentation on the Salesforce Help & Training and Developer sites to set up Nonprofit Cloud correctly.

Organizing Your Team

Before you begin: For organizations that are exploring whether self-implementing will work for them, this section gives general guidance and considerations for building a strong project team. *However*, with Nonprofit Cloud's robust and feature-rich capabilities, it's ***strongly recommended*** that nonprofit organizations explore implementing with a consulting partner. Consulting partners are experts in Salesforce implementation and can help organizations develop a realistic plan based on their budget. They can also identify which features can be used out-of-the-box and where customization or apps might be needed. This ensures that the organization has the right resources and roles to successfully complete the project.

A successful project and rollout with Nonprofit Cloud requires the right mix of roles and resources. We've listed the most important ones below. Consider who might be best for each position and ask them for support. Depending on the size of your nonprofit, one person might fill multiple roles.

Executive Sponsor: An executive leader who prioritizes how time is spent with Salesforce, can help champion the project, provide any needed budget, and remove roadblocks. Prepare your sponsor by having them take the Prepare for Success with Salesforce for Nonprofits trail.

Operations Manager(s): Knows your organization's day-to-day operations, including fundraising, marketing/engagement, grantmaking, and program management. These individuals help you mirror your processes in Salesforce, and prioritize your implementation.

Super Users & Subject Matter Experts (SMEs): Development managers, marketing/engagement specialists, and program managers who provide ongoing feedback to make sure Nonprofit Cloud meets day-to-day needs. Choose staff members who are passionate or vocal about process improvements. If possible, choose a super-user for each job function or area of the organization that might use or be impacted by your implementation. We recommend also engaging external SMEs, such as volunteers, program participants, or donors, who might be able to provide valuable insights to process improvements as well.

Salesforce Administrator: Configures Salesforce and manages it day-to-day. Trains users and creates documentation.

Technical Expert & Salesforce Developers (optional): Supports any technical implementations, system integrations, or security measures that your sector requires.

Important Note: Organizations with resources that need to get up and running quickly might take advantage of Salesforce's robust network of consulting partners. While engaging a partner has an upfront cost, this is money well spent. Partners have years of experience helping nonprofits successfully implement Nonprofit solutions on Salesforce in a way that supports their business processes and allows room for growth. Ask your Executive Sponsor if working with a partner is an option for your organization. Find partners who work with nonprofits on the Appexchange.

Nonprofit Cloud Overview

Nonprofit Cloud Features

Fundraising Philanthropy & Partnerships

The Nonprofit Cloud for Fundraising's Philanthropy & Partnership features provide tools and information to cultivate and solicit large gifts. Your high-touch fundraisers and grant writers can research major donors and grantmakers and then track interactions and progress. The feature area uses Industries Common Components and the Opportunity object, to track and analyze engagement and gift opportunity activities effectively. With Philanthropy & Partnerships, you can use unified donor profiles, actionable portfolios, intuitive note-taking flows, and a single system to store data and limit the effects of fundraiser turnover.

Using the Campaign object and its Campaign Type field, organizations can segment and analyze fundraising results by different programs, such as direct mail or major giving, while excluding large one-time gifts that could distort overall results. This segmentation helps fundraisers tailor their engagement strategies to maximize impact and donor satisfaction.

Fundraising Donor Engagement

Nonprofit Cloud's mass-market donor engagement features are designed to help nonprofit organizations manage and optimize their fundraising efforts at scale. These features help organizations segment their donor base, personalize communication, and automate routine tasks. In addition, the platform provides capabilities to streamline donor management, track fundraising campaigns, and analyze donor data for more effective engagement. Nonprofit Cloud also works with other Salesforce products, like Marketing Cloud, to help fundraisers create advanced email campaigns and donor outreach plans. This helps ensure messages are targeted and relevant.

Nonprofit Cloud has strong reporting and analytics features through Tableau and CRM Analytics. These features help organizations and decision-makers see how their fundraising is doing to find trends and ways to improve.

Fundraising Operations

Fundraising Operations in Nonprofit Cloud provides a comprehensive set of features and tools to manage gifts and donors for nonprofit organizations. These help to streamline the essential tasks of running the business of fundraising. Use these features to enter and process routine gifts, plus help donors with common tasks, like tracking their commitments, updating commitment schedules, and stopping or starting commitments.

Additionally, Fundraising Operations includes APIs that integrate fundraising processes into other systems for scalable and flexible operations. These APIs simplify integrations with automatic record matching, batch processing, bulk operations, and dynamic data mapping. These features make it easier for teams to create strong integrations without a detailed understanding of the underlying data model.

Program, Case, and Outcome Management

Program management in Nonprofit Cloud helps organizations define and manage their programs, outcomes, and benefits. It helps streamline and modernize the everyday tasks associated with maintaining community services and support programs. Organizations can define thematic areas that align with their mission, such as job skills training, financial literacy, or community services. They can enroll participants in these programs, track benefit disbursements, and manage program enrollments. This system also manages scheduling recurring benefit sessions, administering intake assessments, and reporting on program insights to stakeholders.

Plus, included case management tools can help drive program participant outcomes by giving users the full context for each participant. If the organization delivers individualized care and program plans, the system has tools to give more personalized service, even if case managers work with many participants.

When it's time to examine outcomes and results, the Outcome Management feature set helps define, measure, and evaluate an organization's outcome strategy. It helps organizations track the changes they want to make through their programs, such as increasing household income, improving financial literacy, or enhancing family stability. Outcome Management involves several key components like Indicator Definitions, Indicator Assignments, Indicator Performance Periods, and Indicator Results.

Grantmaking

Grantmaking enables organizations to efficiently manage the entire grant lifecycle. The feature set helps grantmakers create and manage funding opportunities, set grant budgets, review applications, award grants, and manage disbursements. Grant seekers can find grants, submit their proposed budgets, and report on their successes after they are awarded a grant.

Grantmaking also features an Experience Cloud template that is preconfigured with the necessary objects for grant applications and post-award engagement. This can be integrated into an existing site or used to create a new site to facilitate the grant application process.

What's more, Grantmaking includes an Automation Toolkit that uses Salesforce components and tools like OmniStudio, Action Plans, Document Tracking and Approvals, and Business Rules Engine to automate and streamline paper-based processes.

Grantmaking works seamlessly with Nonprofit Cloud, but requires additional permission sets and licenses. Review the required Grantmaking permission sets.

Common Components

Nonprofit Cloud was created from the ground up using the Salesforce Industries model. This allowed Nonprofit Cloud to use a set of Common Components. These components let Nonprofit Cloud be expanded to meet customer needs using special solutions that let you quickly create new things and build new ones. Some of the Common Components can be accessed through the Nonprofit Cloud licensing; others require specific PSLs to be added to users who will use the functionality.

Action Launcher

Add actions in the Action Launcher Lightning web component so that your users can search for and launch an action easily. Action Launcher helps your users to resolve customer requests and issues quickly and deliver better customer service. For example, users can initiate a fee-reversal flow or launch a service-order action from Action Launcher.

> ***Used by:***
> *Fundraising* - Required (Example: Upgrade Recurring Gift action, Donation Refunds action)
> *Program Management* - Recommended (Example: Program Enrollment action)
> *Outcome Management* - Optional by Use Case
> *Case Management* - Optional by Use Case
> *Grantmaking* - Optional by Use Case

Action Plans

An action plan defines the tasks and other items needed to complete a business process. Each task has a priority, a number of days in which it must be completed, and a person who is responsible. Action plans are created from action plan templates, which allow you to capture repeatable tasks. Users see the tasks assigned to them through task lists and views. Users record task status information using the standard interfaces for tasks or the Action Plan details view. Target records, such as accounts or contacts, also show lists of related action plans. *Requires PSL Assignment*

> ***Used by:***
> *Fundraising* - Required (Moves Management & Major Gift Engagement)
> *Program Management* - Required
> *Outcome Management* - Required (if using Dynamic Assessments)
> *Case Management* - Required (if using Dynamic Assessments)
> *Grantmaking* - Optional by Use Case

Actionable Lists

Sales Innovations for prospect management offers powerful features to boost sales performance and improve your revenue. Use the rich data source available with Salesforce to help you create a targeted list of prospects, called actionable lists. Implement outreach programs to engage with those prospects to maximize sales and meet your business goals. *Requires PSL Assignment*

> ***Used by:***
> *Fundraising* - Required (Donor Lists, Donor Services, & Campaign Flow)
> *Program Management* - Not Applicable
> *Outcome Management* - Not Applicable
> *Case Management* - Not Applicable
> *Grantmaking* - Optional by Use Case

Actionable Relationship Center (ARC)

Actionable Relationship Center (ARC) lets you view your stakeholders' relationships in an easy-to-navigate graph. ARC helps you understand relationships among people and businesses by presenting them in interactive components. *Requires PSL Assignment*

> ***Used by:***
> *Fundraising* - Required (Interpersonal Relationships, Business and Personal Affiliations)
> *Program Management* - Optional by Use Case
> *Outcome Management* - Optional by Use Case
> *Case Management* - Optional by Use Case
> *Grantmaking* - Optional by Use Case

Batch Management

Automate the processing of records in scheduled flows with Batch Management. With Batch Management, you can process a high volume of standard and custom object records.

> ***Used by:***
> *Fundraising* - Required
> *Program Management* - Required
> *Outcome Management* - Not Applicable
> *Case Management* - Required
> *Grantmaking* - Optional by Use Case

Business Rules Engine (BRE)

Simplify determining eligibility or qualification and automate complex decision-making to find solutions faster using Business Rules Engine. The key components of Business Rules Engine are expression sets and lookup tables. Decision matrices and decision tables together constitute lookup tables. *Requires PSL Assignment*

> ***Used by:***
> *Fundraising* - Optional by Use Case
> *Program Management* - Optional by Use Case
> *Outcome Management* - Optional by Use Case
> *Case Management* - Optional by Use Case
> *Grantmaking* - Optional by Use Case

Data Processing Engine (DPE)

Data Processing Engine helps you transform data that's available in your Salesforce org and write back the transformation results as new or updated records. You can transform the data for standard and custom objects, and Analytics datasets using Data Processing Engine definitions. *Requires PSL Assignment*

> ***Used by:***
> *Fundraising* - Required (Donor Rollups, RFM calculation)
> *Program Management* - Required (Benefit & Program Rollups)
> *Outcome Management* - Optional by Use Case
> *Case Management* - Required
> *Grantmaking* - Optional by Use Case

Decision Explainer

Decision Explainer is a service that provides insights into why a business rule generated a specific result. Decision Explainer has created objects that record how a rule or an expression set ran. This makes it easy for reviewers to explain the result of the rule to users.

> ***Used by:***
> *Business Rules Engine*

Discovery Framework

By using the Discovery Framework data model, your users can collect and validate customer information in compliance with your policies. Use Discovery Framework for needs analysis, digital onboarding, and more.

> ***Used by:***
> *Fundraising* - Not Applicable
> *Program Management* - Required for Dynamic Assessments
> *Outcome Management* - Required for Dynamic Assessments
> *Case Management* - Required for Dynamic Assessments
> *Grantmaking* - Required for Dynamic Assessments

Dynamic Assessments

Create Dynamic Assessments that are easy to use and easy to get information. They also let your users choose between on-site or virtual applications, investigations, and evaluations.

> ***Used by:***
> *Fundraising* - Not Applicable
> *Program Management* - Required (Program Onbarding, Survey & Info Intake)
> *Outcome Management* - Required (Outcome Measurement)
> *Case Management* - Required (Assessments)
> *Grantmaking* - Optional by Use Case

Events & Milestones

With the Events and Milestones component, get an at-a-glance view of your customers' life events or milestones. Use the details to identify upcoming opportunities and devise timely personalized offers and engagement. The Events and Milestones component shows life events for a Person Account or Contact record and business milestones for an Account record. *Requires PSL Assignment*

> ***Used by:***
> *Fundraising* - Required (High-Touch Prospecting, Donor Services)
> *Program Management* - Optional by Use Case
> *Outcome Management* - Not Applicable
> *Case Management* - Optional by Use Case
> *Grantmaking* - Optional by Use Case

Group Membership (Relationships) & Household

Set up standard objects and guided flows to create and define groups of individuals, such as households. Then connect individuals and organizations to each other and track their relationships. Guided flows make it easy to create and edit groups, members, and relationships. *Requires PSL Assignment*

> ***Used by:***
> *Fundraising* - Required (Relationships, Business & Person Affiliations, Householding)
> *Program Management* - Required (Relationships, Business & Person Affiliations, Householding)
> *Outcome Management* - Not Applicable
> *Case Management* - Required (Relationships, Business & Person Affiliations)

> *Grantmaking* - Optional by Use Case

Interaction Summaries

Capture and share interaction summaries. Help staff build and deepen customer relationships with the interaction summaries data model and Lightning components. Your users can manage every aspect of client and partner interactions and take advantage of structured note-taking and compliant, role-based data sharing options. When you add the Interaction Summaries component to the home or account page, your users can create interaction summaries linked with interactions. By adding the Interaction Attendees component to the interaction summary or interaction page, they can easily see and add attendees.

> ***Used by:***
> *Fundraising* - Required (Gift Solicitation Tracking, Outreach Summarization)
> *Program Management* - Recommended but Optional by Use Case (Note Summarization)
> *Outcome Management* - Not Applicable
> *Case Management* - Recommended but Optional by Use Case (Note Summarization)
> *Grantmaking* - Optional by Use Case

Interest Tags

Add custom Interest Tags to records to capture customer, client, or Stakeholder needs, interests, and prospecting opportunities. Having interests in mind during interactions helps deepen relationships. Put interest tags into tag categories. These categories group similar interest tags so you can easily make reports and dashboards showing common themes and interests between groups of people.

> ***Used by:***
> *Fundraising* - Required (Donor Affinity Tracking, Donor Persona & Profile Building)
> *Program Management* - Not Applicable
> *Outcome Management* - Not Applicable
> *Case Management* - Optional by Use Case
> *Grantmaking* - Optional by Use Case

OmniStudio

OmniStudio is a suite of digital engagement tools that allow you to design and deliver personalized journeys across various channels, such as websites and mobile apps. Key features include a drag-and-drop interface for building interactive experiences, integration with various data sources, and the ability to personalize interactions based on individual customer profiles. *Requires PSL Assignment*

> ***Used by:***
> *Fundraising* - Optional by Use Case
> *Program Management* - Required (Upcoming Session FlexCard)
> *Outcome Management* - Required (if using Dynamic Assessments)
> *Case Management* - Required (Multiple UI FlexCards)
> *Grantmaking* - Optional by Use Case

OmniStudio, Document Generation

Generate documents like receipt acknowledgments, contracts, or applications using Microsoft Word (.docx) and Microsoft PowerPoint (.pptx) templates using OmniStudio resources like OmniScripts, Integration Procedures, or Apex classes. *Requires PSL Assignment*

> ***Used by:***
> *Fundraising* - Required (Gift Acknowledgment, Donor Briefs)
> *Program Management* - Optional by Use Case (Consent Forms, Program Applications & Participation forms)
> *Outcome Management* - Not Applicable
> *Case Management* - Optional by Use Case (Case Management Reports)
> *Grantmaking* - Optional by Use Case (Grant Applications)

Record Aggregation

Aggregate one object's records and associate them with the record of an unrelated object to consolidate information and make it easy for users to access information from both objects.

> ***Used by:***
> *Fundraising* - Not Applicable
> *Program Management* - Optional by Use Case
> *Outcome Management* - Optional by Use Case
> *Case Management* - Optional by Use Case
> *Grantmaking* - Not Applicable

Record Alerts

Record Alerts help users decide what needs attention now or soon. Salesforce users can scan records for notifications that show information from your system or from alerts that are stored in Salesforce. You can create custom severity values for alerts and group similar alerts together.

> ***Used by:***
> *Fundraising* - Required (Missed Gift Commitments, Expiring Payment Methods)
> *Program Management* - Optional by Use Case (Program Absence Tracking, Incident Tracking)
> *Outcome Management* - Not Applicable
> *Case Management* - Optional by Use Case
> *Grantmaking* - Optional by Use Case

Timeline

The Timeline component shows key events relating to a person or a resource in one place, so your users can see information from a single source of truth.

> ***Used by:***
> *Fundraising* - Required (Fundraising Template, Major Donor Lifecycle)
> *Program Management* - Required (Participant Major Life Events)
> *Outcome Management* - Recommended (Outcome & Participant Events)
> *Case Management* - Required (Case Management Events)
> *Grantmaking* - Optional by Use Case (Grant & Award Events)

Selecting Feature Areas

Identify Goals & Impact Areas

Meet with the planning and project team and review the vision that brought the organization to Salesforce Nonprofit Cloud (bonus points for those who were inspired by the [Nonprofit Cloud Vision and Values Trailhead]() module). Now identify areas to improve in the organization, and then set a specific measurable goal for addressing each improvement using Salesforce. Agree on priorities and pinpoint the metrics needed.

Record meeting notes using a table like this one. Later, use these metrics to inform how to tweak features so that they track towards these goals.

Sample Outputs from Planning:

Goal	Related Metric	Responsible Team
Understand expected revenue from grants	Grants pipeline by stage	Grants Management team
Understand which campaigns have been the most effective	Total donations by campaign	Fundraising Operations Marketing & Outreach
Establish a single place where the development team can get insights into fundraising progress in real time	The number of donations v. Goal Total income v. Goal	Development Fundraising Operations

Align Goals & Impact Areas to NPC Features

Implementers want users and staff to be excited about Nonprofit Cloud. Revisit the goals that the team established earlier, and think about how these can be framed as the benefits when described to users. Consider whether to adapt messaging for different roles or job responsibilities. Including members of each department in the planning team will ensure that all users benefit.

Goal	Related Metric	Responsible Team	Business Value
Understand expected revenue from grants	Grants pipeline by stage	Grants Management team Development team	Development team members can more easily track the lifecycle of their grants
Understand which campaigns have been the most effective	Total donations by campaign	Fundraising Operations Marketing & Outreach	Fundraisers can focus their efforts on successful fundraising strategies
Establish a single place	The number of donations	Development	Fundraisers can check in

where the development team can get insights into fundraising progress in real time	v. Goal Total income v. Goal	Fundraising Operations	on how they are tracking towards their goals and make critical decisions in real-time

Plan Timeline & Implementation Scope

Think about major rollout milestones and start plotting a timeline. We recommend reading Best Practices for Project Management. But remember that *there's no standard or recommended timeframe* for the capabilities and features of Nonprofit Cloud.

Several factors determine a project's timeline.

- The organization's understanding of the goals and objectives for the project.
  - Everyone involved should share the same understanding of what the project is about and why it's important.
  - To ensure positive outcomes, everyone involved should have a clear understanding of the success metrics and goals. As the implementation rolls out and is adopted, these metrics and goals will help guide the team.
- The project's scope defined after discovery and requirements for the implementation.
  - The more features and functionality needed based on requirements can increase the project's timeline.
  - The more customization needed from the product's intended design may increase the project's timeline.
  - The project might need to be broken down into phases or releases.
- The availability of key resources like Subject Matter Experts, key stakeholders, and user acceptance testers.
  - Besides financial commitment, it should be clear what staff and availability are needed to make sure a team can finish the project on time and within budget.
  - Identify key stakeholders, Subject Matter Experts and decision makers for each functional requirement or solution area to make delivery more efficient.
- The organization having a clear understanding of the time and engagement requirements and project team responsibilities.
- The breadth and experience of the project team.
- The project's budget allocation.

After reviewing the factors above, it's time to establish dates. Avoid busy stretches and major fundraising events like year-end giving season or galas. Once the team has decided on a go-live date for identified features, work backwards from that point.

Here are some example milestones the team might want to incorporate into the project or implementation plan:

Make it Your Own	**Rollout**	**Drive Adoption**

Establish rollout team	Prepare for User Acceptance Testing (UAT) in a Sandbox	Check login frequency
Define business processes and goals	Add users to Salesforce	Send “Tips and Tricks” email or lunch and learn
Send teaser email to staff	Perform UAT and gather feedback from users	Hold check-in meeting or office hours
Review Nonprofit Cloud Permissions and Settings	Tweak features in a Sandbox and deploy to production	Tweak features in a Sandbox and deploy to production
Review Nonprofit Cloud Help & Training Documentation for configuration	Announce rollout schedule	Keep up on Salesforce releases and announce impactful changes
Customize features in a Sandbox	Prepare and schedule staff training	
Test, get feedback from stakeholders, tweak features	Hold training	

Getting Your Environment

Starting Point

When exploring options to get hands-on with Nonprofit Cloud, implementers have two main options: a Learning Org or a Base Org. Learn more about org options in Help & Training.

> **Important:** Learning Orgs and Base Orgs are trial instances that end after 30 days. Customers need to work with their Account Executive (AE) to set up their production instance.

Learning Org

Learning Orgs usually have the most recent production release features enabled and set up. They also have relevant sample data to help users learn how Nonprofit Cloud can be used out-of-the-box. However, these environments only have the features and capabilities of Nonprofit Cloud. They do not include common add-on solutions that work on different platforms, like Marketing Cloud or CRM Analytics/Tableau.

Learning Orgs are also a great place for implementers to take their experience a step further by building proof-of-concepts or customizing solutions for specific requirements or use cases.

> **Important:** Learning orgs aren't meant to be used or converted into a production environment. Instead, we suggest customers work with their AE to set up their real production instance.

Learning Orgs are best for these situations:

- Implementers interested in using or exploring all aspects and solution lines of Nonprofit Cloud, like High-Touch Fundraising, Mass-Market Fundraising, Program and Outcome Management, or Grantmaking.
- Implementers who need or are interested in understanding data structures or format necessary for using Nonprofit Cloud.

To request a Learning Org, **fill out this form.**

Base Org

Base Orgs are like Learning Orgs. They come with the most recent production release of Nonprofit Cloud, but they don't have any settings or features.

> **Important:** Base orgs aren't meant to be used or converted into a production environment. Instead, we recommend working with the customer account's AE to provision their actual production instance.

Base Orgs are best for these situations:

- Implementers who want experience setting up Nonprofit Cloud from an unconfigured state to simulate a customer's provisioned environment.
- Specific, limited use-case situations like a Human Services organization without fundraising or grantmaking needs.
- Implementers who want experience or control enabling only specific functionality, like Common Components (Interaction Summaries, Data Processing Engine, Business Rules Engine).
- Implementers who need to test integrations or apps with their defined data or data formats.

To request a Base Org, **fill out this form.**

Where to Start

Implementers should work with their account's AE to have a production environment provisioned based on their contract and relevant entitlements. When the environment is provisioned, make sure any cross-platform, add-on solutions included in the organization's contract are also available – these may be delivered through specific License types, Profiles, Permission Set Licenses, etc. – and can be reviewed through the Company Information page in Setup.

> ***Common Question:*** *What about Trailhead Playground or environments used for training? We've already built some functionality there based on our needs or use cases?*
> Because these environments lack the capabilities of traditional production-level environments, they can't be converted to serve as a production instance. Customers should work with their account's AE to have an environment provisioned, which the implementer can then configure.
>
> Functionality developed in one of these non-production environments can be packaged and deployed to build environments as an Unmanaged Package for those new to or with less experience in deployment, or using an Unlocked Package for those with more experience or defined DevOps process.

Building Environment

Production

Treat your production instance as the main environment that your organization's users will use. You can only make changes or deploy to this environment once you've tested and validated those changes in a Sandbox. If you're not familiar with development and deployment best practices, learn more about App Development and Deployments with Salesforce here. To help you learn about the permissions and apps in the production environment, the Appendix has a list of NPC-related data.

See Also:

- Salesforce Help: Log In for the First Time
- Trailhead: Deploy Apps as a Salesforce Administrator
- Nonprofit Cloud Core Permission & App Inventory

As you begin your implementation project, create a sandbox environment where you can build customizations and configurations. Most customization can then be deployed to the production environment. However, there might be certain configurations like OmniStudio resources or profiles and permission changes that might require more care.

Metadata Configuration that might require additional effort to deploy:

- Profiles, Permission Sets, & Permission Set Groups - While deploying metadata with permissions, errors can occur because of dependencies and the order in which metadata is moved. It might be required to package permissions in a second deployment to mitigate these errors.
- OmniStudio Assets - When deploying OmniStudio assets, errors or issues can be experienced based on dependencies of parent-child resources. Read more here and here.
- Experience Cloud Site Assets - Some features and components of Experience Cloud sites aren't supported by the Metadata API, so it's best to review the documentation to understand steps and requirements for deploying site settings and features.

Sandbox

Sandboxes are isolated, cloned instances of the production environment, and come in several different types. Sandboxes copy the metadata of the production environment to create an exact copy at the point in time which the Sandbox is initialized or refreshed, allowing for changes or new features to be built outside the production environment, tested against an environment just like the production environment, and able to be packaged and deployed for installation in the production environment.

And for testing, depending on the Sandbox type, data can be sampled or copied from the production environment to seed the Sandbox in the initialization or refreshing process.

Learn more about Sandboxes Types and Templates here.

Deployment Resources

- Basic Deployment Resources
- Unlocked Packaging
- DevOps Center (Advanced, DevOps techniques)
- OmniStudio - IDX Workbench
- OmniStudio - Build Tool

Day-One Configuration

Enabling Nonprofit Cloud

Before You Begin

To set up and manage Nonprofit Cloud, you'll need to use Salesforce Setup. You'll need to have System Administrator-level access or the system permissions equivalent to the System Administrator profile, including these permissions:

- Custom Application
- View Setup and Configuration
- Assign Permission Sets
- Manage Profiles and Permission Sets
- Manage Internal Users

Take a look at these resources to determine if you need any additional permissions based on your specific use case.

- Manage Permission Set Assignment (Help & Training, Docs)
- View and Manage Permission Set Licenses (Help & Training, Docs)
- *For Permission Set Licenses:* How Many Licenses Have I Used? (Help & Training, Video)
- Assign a Permission Set License (Help & Training, Docs)
- Permission Set Groups (Help & Training, Docs)
- *For Permission Set Groups:* Muting Permission Sets (Help & Training, Docs)

- Permission Set Groups (Trailhead, Trail)
- View Permissions Enabled in a Permission Set or Permission Set Group (Help & Training, docs)
- Security and Permissions for Nonprofit Cloud (Help & Training, Docs)

Permission Sets and Permission Set Licenses

As people start using Nonprofit Cloud, they should know about two main permission features: Permission Sets and Permission Set Licenses. While they sound similar, these two serve different purposes and functionalities for managing user access and permissions.

Permission Set

A permission set is a collection of settings and permissions that grant users access to various tools and functions without changing their profiles. Permission sets can be cloned and allow administrators to grant additional permissions to users on top of their existing profile permissions. A bundle of permission sets can be created using permission set groups,like Fundraising User or Fundraising Admin provided with Nonprofit Cloud.

Permission Set License

A permission set license is used to let one or more users get a certain permission without changing their profile or reassigning profiles. Permission set licenses are typically used to grant access to features that are part of a licensed package or add-on, like Fundraising features or Program Management features and their respective Setup pages. Permission set licenses can't be cloned or modified.

Here's a quick comparison between permission sets and permission set licenses:

	Permission Set	**Permission Set License**
Purpose	Used to grant additional permissions to users without altering their profiles	Used to grant access to specific features or functionalities tied to a licensed package or add-on
Flexibility	Can be assigned to one or more users to extend their access rights	Can be used to grant permissions but not to deny access
Components	Includes permissions for custom apps, custom object permissions, custom field permissions, Apex class access, Visualforce page access, and more	Represents the license required to enable certain permissions for users
Editability	Subscribers can clone or create new Permission Sets based on existing ones, although these cloned or created sets aren't updated during package upgrades	Permission Set Licenses themselves aren't editable by subscribers; however, the assignments can be managed
Standard Object Permissions	Deliver basic permissions based on	Not applicable as Permission Set

	managed Permission Sets delivered with Nonprofit Cloud, which include related Permission Set Licenses	Licenses are about granting access to specific features rather than object permissions
User Permissions	Permission Sets don't include user permissions	Not applicable directly, but they control access to features
Assignment	Must be manually assigned to users *See [Manage Permission Set Assignments]*	Users must be assigned to Permission Set Licenses, and these assignments can be queried and managed through the API

Configuring a production or base environment of Nonprofit Cloud begins with assigning permission sets (PS or PSs) and permission set licenses (PSL or PSLs) to relevant admin users. Users should be assigned the *core* permission sets and PSLs relevant to the solution areas they need access to for configuration. Additional PSLs should be added when enabling additional capabilities like relationships or common components. For features which have matching permission sets and PSLs, assign the permission set and the PSL will automatically be assigned. However, there might be stand-alone PSLs which need to be assigned manually as well. As a best practice, review the permissions enabled in a permission set or permission set group to ensure proper access is granted.

Here's a chart around core feature areas and the related entitlements required to access the feature areas:

To access...	Permission Set License	Also found in...
Fundraising	Fundraising Access	Fundraising_Admin (PSG) Fundraising Access (PS)
Program Management	Program and Benefit Management	Program and Benefit Management Access (PS)
Outcome Management	Outcome Management	Outcome Management (PS)
Specific Benefit & Program-related Objects	Advanced Program Management	

Note: *PS = Permission Set; PSG = Permission Set Group*

Important: When you create a trial org, you automatically get permission sets and PSLs assigned to your user account. These permissions give you access to the features that you need to get started. If you add more people to your trial, assign them the same permissions. This way, they'll have access to the same features as you.

Beginning Feature Configuration

Before You Begin

Nonprofit Cloud's setup and administration are designed to take place in Salesforce Setup. Feature setup pages are listed in the main Setup menu and can be found quickly with the Quick Find lookup feature.

- *To clone Managed Permission Sets:* Create Permission Sets (Help & Training, Docs)
- *To assign Permission Sets:* Manage Permission Set Assignment (Help & Training, Docs)
- Assign a Permission Set License to a User (Help & Training, Docs)
- *For Permission Set Groups:* Muting Permission Sets (Help & Training, Docs)
- Security and Permissions for Nonprofit Cloud (Help & Training, Docs)

As implementers begin to introduce some Common Component features, additional PSLs might be needed for configuration.

To access...	Used by...	Permission Set License	Required for...
Action Plans	Fundraising, PM, CM, OM, GM	Action Plans	Dynamic Assessments, Dynamic Applications (GM)
Actionable Relationship Center (ARC)	Fundraising, PM, CM, OM	Actionable Relationship Center	
Business Rules Engine	Fundraising, PM, CM, OM, GM	Business Rules Engine Designer Business Rules Engine Runtime	
Care Plans	PM, CM, OM	Care Plans	
Data Processing Engine	Fundraising, PM, CM, OM, GM	Data Pipelines Base User	
Dynamic Assessments	PM, OM, CM, GM	Dynamic Assessments	
Relationships & Households	Fundraising, PM, CM, GM	Group Membership	Leveraged by ARC
OmniStudio	Fundraising, PM, OM, CM, GM	OmniStudio	Dynamic Assessments
OmniStudio, Doc Gen	Fundraising, PM, OM, CM, GM	DocGen User	OmniStudio

Note: *PM = Program Management; CM = Case Management, OM = Outcome Management, GM = Grantmaking*

Once Permission Sets and PSLs are assigned, the additional configuration steps can be found in Help & Training. While PSLs grant access to objects and features behind licenses or entitlements, it's important for implementers to be aware that additional field or sharing access might be required for features and functionality to work properly.

Planning for customization can change permissions and access, so it's important to clone the relevant managed permission sets and permission set groups. This will ensure that your changes are persistent. This is also an opportunity to modify the cloned permission set or permission set group to meet the access requirements for objects and fields while practicing the Salesforce best practice of Principle of Least Privilege. These permission sets and permission set groups should be assigned to end users for your system. Changes made to the managed Permission Sets or Permission Set Groups will be overwritten each release as new innovation is delivered.

To keep up with new features and functions, admins should read the Nonprofit Cloud release notes. They should also look at what permission sets or permission set groups they have cloned might need to be updated to use any feature or function that can be helpful in the future.

Important: As implementers work through the steps for configuration, if a feature setting in Setup isn't visible or available, check the permission sets and permission set licenses for the user to ensure the user has adequate access for the feature setting that is being configured (for example Fundraising Access permission set and Fundraising PSL are needed to see the Fundraising feature setting page in Setup).

Implementing Stakeholder Management

The foundation of Nonprofit Cloud leverages the core CRM functionality of Salesforce to track stakeholders and data related to them. Nonprofit Cloud has been designed from the ground up to use the Person Account model to model stakeholders, and Business Accounts to model organizations, partner companies, and households.

Using Person Accounts

Before You Begin

Review these resources for working with Person Accounts.

- Setting Up Person Accounts (Help & Training, PDF)
- Person Accounts (Help & Training, Docs)
- Stakeholder Management in Nonprofit Cloud (Trailhead)

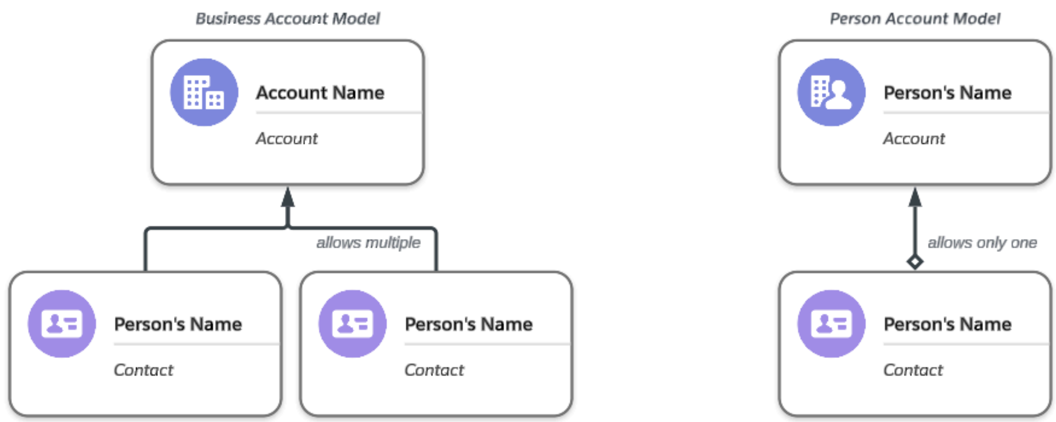
A Brief History of Person Accounts

The foundation of the Salesforce platform was built around the idea of a person (Contact) being related to an organization or business (Account, Business Type) or a business-to-business customer relationship management model.

As use cases increased, an account model was needed to show how an individual connected with the organization. This led to the person account model, which is a traditional business-to-consumer relationship. Salesforce Industries uses this account model as their main model. It was a good choice for Nonprofit Cloud to use, and we strongly suggest using it in implementations.

What Are Person Accounts?

Similar to the business account model, person accounts utilize the *account* and *contact* objects. However, the number of contacts that can be associated to the account is restricted to one in the person account model.



How Person Accounts Behave

Before You Begin

Review these resources to understand how Person Accounts can differ from the business account model.

- [Considerations for Using Person Accounts]() (Help & Training, Docs)
- [Considerations for Using Merge Fields for Person Accounts]() (Help & Training, Docs)

Before enabling Person Accounts, we strongly recommend reading through the [Setting Up Person Account Guide]() and review the considerations on Page 8. Once enabling Person Accounts, its important to discuss some important behaviors of the platform that are altered.

Contact Lookup

Certain lookup fields that point to the contact object have the potential to become polymorphic. This means

that these particular fields can refer to both the contact and account objects.

Consideration: When you encounter this behavior, you need a plan to ensure data integrity, such as standardizing the reference object. For example, all records for a specific object with a relationship field to both the contact and account objects should reference the contact object ID. This behavior is not common to all objects. It can occur on objects shared across the platform or on common components. You won't encounter it on objects built for Nonprofit Cloud.

Implementers should also be prepared to design a solution to *prevent* or *train* end users on how to handle creating a new Contact, in cases where a Contact lookup allows for users to create a new Contact. This behavior **will not** create a person account, but instead a contact, where an account will need to be created and converted to a person account. See Person Account Importing & Conversion.

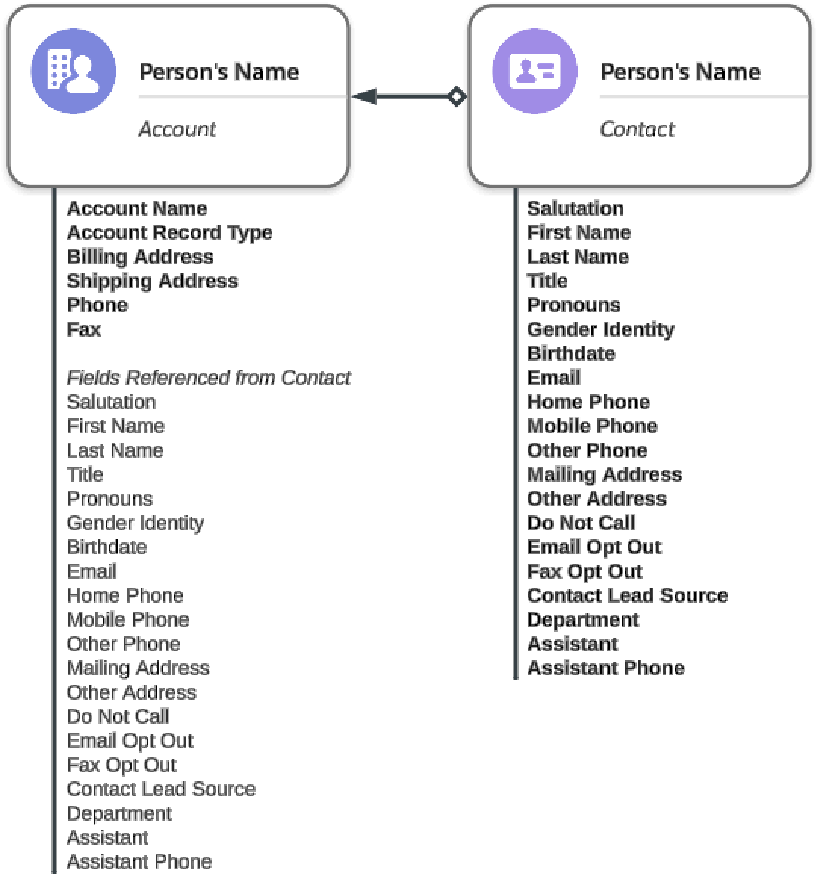
Access Contact Page Layout

Implementers and users should be aware that for Account records whose record type is a person account type, the Contact record of the relationship will redirect to the Person Account page layout.

If you click a link to see a Contact record, you'll be redirected to the Person Account record. This also happens if you try to access the contact record from the Contact tab or a list view. You won't be able to access the Contact record through the UI.

Contact Field Sharing

When you enable person accounts, you can use contact fields on the person account page layout. Contact fields have a virtual copy that you can access from the Account object through the UI and API. Standard account fields that are referenced from the Contact object will have a prefix in the Developer Name of "Person...", for example, PersonEmail. Custom fields that you add to the contact object will be accessible on the account object with a __ pc suffix, for example, Account.CustomField__pc.



Another behavior change occurs with the **Account Name** field. For accounts whose record type is Person Account, the Account Name value is made up of the related Contact's Salutation + First Name + Last Name fields.

Common Questions Implementing Person Accounts

Can person account coexist with contacts in my Salesforce org?

Yes, but it's strongly suggested to use person accounts only because some features in Nonprofit Cloud depend on person accounts. Future features might also depend on it because it's the recommended account-contact model for NPC.

What is the best practice for building fields? Do I build on the account object or contact object?

Contact-specific information should be built on the contact object. This is especially important for integrated apps like marketing automations that can look at contact for fields even though they work with Person Accounts. Account-specific information should be built on the account object.

Consideration: Sometimes you need external ID fields on records for integrations or automation. While contact fields can be available on Person Account records, note that field characteristics aren't shared. If a field is marked as an external ID, that characteristic is only available for the object it was created on. So if you need an external ID and integrations will call both contact and account objects, you might need an external ID field on both objects.

What if a field applies to both accounts and contacts?

This will be a case-by-case decision. Evaluate the presence of integrations, and so on when deciding. For example, you have a checkbox for VIP that you use for both business and person accounts.

Implementing Person Accounts

Before You Begin

Implementing person accounts takes some planning because, once enabled, you can't deactivate or disable them. There are ways to prevent their use, but it's important to be aware of this before you enable them. As you begin the process of implementing person accounts, we recommend reviewing these resources.

- Setting Up Person Accounts (Help & Training, PDF)
- Person Accounts (Help & Training, Docs)
- Mythbusting: Five Common Misconceptions about Person Accounts (Admin Blog, Web)

Like any project, getting ready is important. Here is a quick list of things to look at as people get ready to make person accounts available.

- **Third-Party Apps** - Whether installed or planning to fill solution gaps, apps and third-party solutions should be reviewed and audited to ensure they support person accounts or work as intended if person accounts are enabled. For example, the Salesforce standard Outlook Integration Panel.
  - When doing this research, also understand what platform API version each application uses.
  - Some functionality and objects in the Nonprofit Cloud data model might be inaccessible if the application uses an older API version.
- **Reporting and Analytics Requirements** - For existing implementations preparing to implement with established reporting or analytics needs, know and understand what data-specific data is needed, and prepare to audit the object or data model so that implementers will understand the best place to get the data from when working person accounts.
- **Automations or Code Requirements** - Whether an existing or new implementation, a thorough review and mapping of automation or code requirements will be needed to plan for implementing Person Accounts. Although the tight coupling relationship between contact and account, triggers will only fire for affected records, not both, like in these examples:
  - When an *Account* record (Person record type) is updated, *Account* triggers fire.
  - When a *Contact* record is updated, the *Contact* triggers fire.
  - Both Contact and Account triggers fire only when a new person account is created, or if combined fields, like First Name and Last Name, are updated

- **Integrations or Web Services Requirements** - For existing implementations, enabling person accounts will add additional fields and features to the org's metadata. It is recommended to look at possible effects on how integrations are used for possible changes to contact or account data flows, as well as metadata structures. Prepare for any work needed to update files or integrations once the configuration has been enabled.
    - If you have an existing implementation, enabling Person Accounts might require you to review integrations or web service resources. For older SOAP-based integrations, it can be necessary to create a new XML or WSDL.. Learn about generating a new file on the Developer's site.

Enabling Person Accounts

Before You Begin

Review these resources to better understand the requirements and considerations around enabling Person Accounts.

- Enable Person Accounts (Help & Training, Docs)
- Account Fields (Developer, Docs)

As an implementer prepares for enabling Person Accounts, the first step can be checking whether the feature is already enabled. Depending on the source of the environment, the setting might be enabled. If the Person Account object is shown in Object Manager in Setup, then the feature setting has been enabled. If not, follow the steps in the Enable Person Accounts Help & Training article after reading the article.

As mentioned in the resources linked in the ***Before you begin*** sections, a prerequisite for enabling person accounts is that at least **one** Business Account record type must be created in the environment.

After you check the acknowledgement and create at least one Business Account record type, implementers can update relevant permissions and sharing settings to enable person accounts.

> **Important:** There's no need to create a Person Account record type when you create Business Account record types. The person account feature setting automatically creates this record type for you. After you enable it, the Person Account virtual object and related fields on the Account object are available in Setup's Object Manager. Additionally, new fields and configurations are available through the API and org shape.

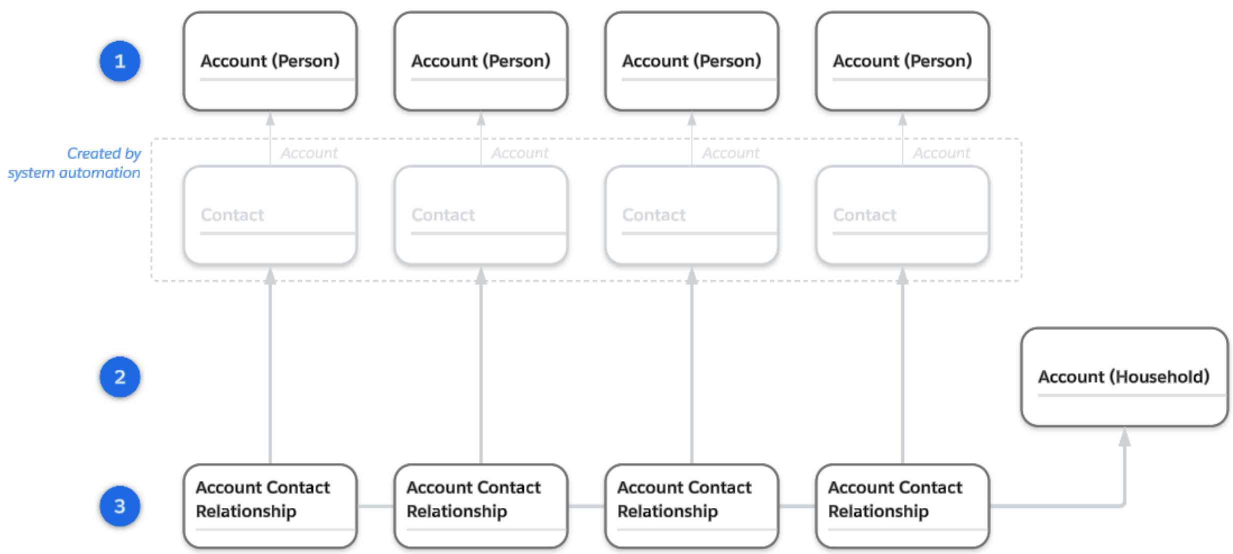
Person Account Importing and Conversion

Before You Begin

The process of converting Business Accounts to Person Accounts can be relatively straightforward. However, it's strongly recommended that implementers use a new Salesforce org with Nonprofit Cloud for the implementation. To understand the process of importing records into an org with person accounts enabled, see these resources.

- Add Person Accounts with Data Import Wizard (Help & Training, Docs)
- Nonprofit Cloud Migration Guide (Help & Training, Docs)

After establishing the existing organization's account model, an implementer can begin the mapping and importing process. Here's a diagram to explain the process.



As implementers prepare to create contacts, this data should be isolated and then created as person accounts in the Nonprofit Cloud (NPC) environment (**1**). By creating these records as person accounts, the companion Contact record will be created and associated to the Person Account record.

Next, import the households or organizations into the NPC environment in with an appropriate record type (**2**). While not illustrated here, it's important to also create the Party Relationship Group record for these accounts.

The last major step, to fully represent the relationship, Account Contact Relationship records would be created mapping the contacts with their household or organization (**3**).

From this point, you might need to add related objects and data.

- Contact Profile records for bio-demographic data.
- Party Relationship Group for account (household or organization) data.

- Donor Gift Summary for individual or household gift data.

However, there can be a situation where Contacts are created prior to Person Accounts being enabled, and therefore, either:

- Create accounts.
- Convert previously-created accounts to person accounts.

Good news! Converting an account from a business account to a person account is relatively easy under these conditions.:

- The account is associated with only one contact.
- Both the account and contact are owned by the same user.
- If a currency feature is enabled, both account and contact must have the same selected currency value.
- The Parent Account field on the Account record must be blank and the Account isn't set as the Parent Account value to any other accounts.
- The Reports To field on the Contact record must be blank and the contact isn't set as the Reports To value for any other contacts.
- The contact doesn't have a portal or experience user associated to them and the Account record’s IsCustomerPortal value is set to **FALSE**.

If these parameters are met, all you need is a simple conversion template with the IDs of the accounts to convert and the Record Type ID for the Person Account record type.

Important: Here are some things to keep in mind for the conversion process.

- As best practice in mass data operations, review and assess any automations that can be run or fired from the Update operation. It's best to disable these automations unless an implementer has tested for performance and any potential outcome.
- During the conversion process, be aware that certain values can be overwritten:
  - Account Name is overwritten.
  - Phone, Fax, Description, Created By info, Last Modified info, and Last Activity info on the Contact record.
- If this data is needed, create custom fields and load this data into the matching field prior to conversion.

Import & Conversion Gotchas

Before you begin:

Conversion comes with some complexity. To understand potential issues that can arise during conversion, we suggest that implementers review these resources.

- Setting Up Person Accounts (Help & Training, PDF) (***See Page 13***)
- Considerations for Using Person Accounts (Help & Training, Docs)

It isn’t recommended to migrate or convert in-org or in-place due to potential issues or implementation and conversion complexity. These complexities include:

- Creating 1:1 Account records for existing Contacts, and updating the contact’s Account field to the new account IDs.
- Disassociating contacts from existing household accounts ormigrating their relationship to Account Contact Relationship records.
- Updating the new Accounts’ record types to Person Account records
- Potential issues and work when contacts have portal or community users associated with them
- Potential issues around manual or complex sharing mechanisms with existing accounts

When you import data into a new Nonprofit Cloud environment, it’s vital to map targets and understand objects where data should be mapped. To understand the Nonprofit Cloud data model and its objects, and to help you plan your data mapping, check out Salesforce’s Object Reference Guide and the Nonprofit Cloud Developer Guide. Here are some tips to review with the implementation team and customer.

- Data can be split across multiple objects. To get started, understand how data is used in your existing environment, its characteristics, and how you plan on using it in Nonprofit Cloud. When you have these details, build a data map using the Object Reference Guide and Developer Guide. This will help you identify data that requires new fields.
- In Nonprofit Cloud, data can have a new field type. Check your data's field type to see if it's compatible with Nonprofit Cloud. It can be necessary to transform some of your data.

If you're an existing customer with structured data in either the Nonprofit Success Pack or your custom solution, we strongly recommend that you implement it in a new environment. Here are some steps to get you started:

General Steps and Workflow

1. Identify the Account model used, if it is not 1:1. Plan to create Account Contact Relationships for these relationships and determine what Role these individuals play with the Account.
2. Retrieve the Person Account Record Type ID.
3. Create the existing contacts as accounts in Nonprofit Cloud and define the Account Record Type ID as the Person Account record type. The system creates the Account and Contact records with the related association.

    Important: If you create a Contact first, you won't be able to create a Person Account for it. You must create an account first, and then convert it to a person account.

4. After creating the original contacts, create the original households using a Business Account record type that corresponds to the household construct for the implementation.
5. After you create contacts as Person Accounts in Nonprofit Cloud, you can create Account Contact Relationship records. These records link contacts to their related accounts and define how they're connected.

Contact & Stakeholder Strategies for Nonprofit Cloud

Before You Begin

Figuring out how to use Person Accounts to model stakeholders in Nonprofit Cloud might be new to you. Here are some resources that explain the basic requirements.

- Stakeholder Management in Nonprofit Cloud (Trailhead)
- How Nonprofit Cloud Models Groups and Relationships (Help & Training, Docs)

In most use cases, it is recommended that implementers use Person Accounts and the relevant object structures to associate people to each other, organizations, or households. However, there are important nuances for Nonprofit Cloud for Grantmaking implementations.

Here's an example of different roles a nonprofit organization or grantmaker might work with, and how they're best modeled in Nonprofit Cloud:

		How Do I Represent the Person?		How do I represent...		
Solution Area	**Person's Role**	**Person Account**	**Contact + Business Account**	**Additional Contact Details**	**Personal Relationships**	**Organizational Relationships**
Fundraising	Donor or Prospect	Ideal	Not Ideal	Contact Profile & Donor Gift Summary	Contact Contact Relationship	Account Contact Relationships
Fundraising	Donor Family Member	Ideal	Not Ideal	Contact Profile	Contact Contact Relationship	Account Contact Relationships
Fundraising	Event Attendee	Ideal	Not Ideal	Contact Profile	Contact Contact Relationship	Account Contact Relationships
Fundraising	Foundation Staff	Ideal	Not Ideal	Contact Profile	Contact Contact Relationship	Account Contact Relationships
Fundraising	Donor Advised Fund Staff	Ideal	Acceptable with limitations	Contact Profile	Contact Contact Relationship	Account Contact Relationships *if Person Account*
Fundraising	Corporate Partnership Staff	Ideal	Acceptable with limitations	Contact Profile	Contact Contact Relationship	Account Contact Relationships *if Person Account*
Fundraising	Board Member	Ideal	Not Ideal	Contact Profile	Contact Contact Relationship	Account Contact Relationships
Programs Case Mgmt	Client	Ideal	Not Ideal	Contact Profile	Contact Contact Relationship	Account Contact Relationships
Programs Case Mgmt	Client Family Member	Ideal	Not Ideal	Contact Profile	Contact Contact Relationship	Account Contact Relationships
Programs Case Mgmt	Case Worker (Non-Staff)	Ideal	Not Ideal	Contact Profile	Contact Contact Relationship	Account Contact Relationships

Programs Case Mgmt	Service Provider Staff	Ideal	Not Ideal	Contact Profile	Contact Contact Relationship	Account Contact Relationships
Programs Case Mgmt	Provider Executive	Ideal	Not Ideal	Contact Profile	Contact Contact Relationship	Account Contact Relationships
Grantmaking	Grant Recipient Staff	See [Grantmaking Account Model Considerations]()		Contact Profile	Contact Contact Relationship	Account Contact Relationships *if Person Account*
Grantmaking	Grant Recipient Administrator	See [Grantmaking Account Model Considerations]()		Contact Profile	Contact Contact Relationship	Account Contact Relationships *if Person Account*
Grantmaking	Grant Recipient Program Officer	See [Grantmaking Account Model Considerations]()		Contact Profile	Contact Contact Relationship	Account Contact Relationships *if Person Account*
Grantmaking	Grant Recipient Executive	See [Grantmaking Account Model Considerations]()		Contact Profile	Contact Contact Relationship	Account Contact Relationships *if Person Account*
Multiple	Volunteer	Ideal	Not Ideal	Contact Profile	Contact Contact Relationship	Account Contact Relationships

Grantmaking Account Model Considerations

Grantmaking customers who make the vast majority of their grants to organizations rather than individuals are likely to find the Contact + Business Account model more appropriate than Person Accounts. Person Accounts aren't required for Grantmaking. However, they are strongly recommended for customers using other areas of Nonprofit Cloud, like Fundraising or Program Management. Grantmakers who aren't leveraging these other feature areas and only make grants to organizations will likely benefit from leaving Person Accounts off.

Person Account Considerations

Notice that in most cases, using Person Accounts is ideal. Using Person Accounts as the standard model allows for:

- All out-of-the-box features to be supported
- No deviations from documentation in Help & Training, Trailhead, or Developer Resources
- A standard, predictable model for users, admins, and your Salesforce development team
- Consistent usability, and future-proofing for future features and functionality

Sometimes, you might need to consider a model other than one that uses Person Accounts. When considering the correct model, think about these questions.

- Is the requirement or need business process-driven?
    - Can the process be changed or modernized?
- Is the requirement or need driven by user comfort?
- Is the requirement driven by some non-Nonprofit Cloud feature or functionality on the platform?
    - Has Support been contacted to troubleshoot?
- Is the requirement due to a 3rd-Party Solution or AppExchange product?
    - Are there alternative products or solutions available which do support Person Accounts?
- Is the requirement driven by technical debt through integration or data service provider?
    - Is refactoring to support Person Accounts too costly or does not fit within implementation timelines?

If the implementation can't meet the requirement, know that there can be limits to the current features offered through Nonprofit Cloud and future features and functionality. Develop a plan to educate the customer to help tell them about the limitation after the implementation.

Using Profile & Detail Objects

Before you begin: As you work with stakeholders, you need to understand the new detail objects closely associated to the Contact and Account objects. Review these links to understand the objects implementers should account for starting out:

- Contact Profile (Developer, Docs)
- Gift & Donor Trends Are Shown with Rollups (Help & Training, Docs)
- Donor Gift Summary (Developer, Docs)

As Nonprofit Cloud builds on the Industries data model, detail objects are a new pattern to the object model. They are added to help make the model more powerful and efficient. The two notable objects for Stakeholder management are the Contact Profile and the Donor Gift Summary objects.

> **Important:** You can only have one record of each type for each person. This rule is enforced in the system. Automations should check for existing records before creating new ones.

Contact Profile

In the Developer documentation, implementers will find that the Contact Profile object contains personal information like ethnicity and citizenship.

Why use the Contact Profile object instead of creating custom fields on the Contact? It’s a good question. The Contact Profile object keeps personal and sensitive information separate from the main Contact object. This separation makes it easier to manage and secure sensitive data.

The Contact Profile object stores detailed personal information. This way, you can keep your Contact object streamlined and easy to manage, without cluttering it with lots of custom fields.

As the amount of profile-related information grows, using a separate object helps keep the system running and scalable. This includes automations or data storage. Adding too many custom fields to the Contact object can lead to performance issues and make the object unwieldy.

The last important note is that the Contact Profile object has a rules framework that helps with the features that come with the product. These features help you segment people and target campaigns, which is better for complex marketing and business processes.

Consideration: Before you recommend Contact Profile to your customers, let's explore how it might fit into their use cases. Here's where you should start:

- **Availability**–Is another product or solution you plan to implement that can't access the object? (For example, some marketing automation integrations or third-party AppExchange solutions.)
- **Automation**–Does Contact Profile cause issues or increase the complexity of a resource-intensive process? (For example, the Contact Profile object requires a separate query and loop.)
- **User Experience (UX)**–ill different variations of pages or screens be required due to the added fields, vs. using conditional formatting for a single related list?
- **OOTB Functionality–**ill introducing custom fields on the Contact object affect any planned:
  - Automations, including Flow or Omnistudio.
  - Page layouts, lightning record pages layouts, or dynamic forms.
  - Lightning web components.
  - Common Component use cases like Dynamic Assessments, Actionable Relationship Center (ARC), etc.

Donor Gift Summary

Implementers should be ready for the Donor Gift Summary object, which is a key part of managing and summarizing donor contributions and commitments in the Fundraising domain. This object is used as a rollup or summary object populated with calculations from included Data Processing Engine (DPE) rollups.

Calculations on this object, as designed from the start (OOTB), are not real-time. It is strongly suggested to look at the DPE considerations to plan and schedule when these rollups are calculated.

When implementing the Donor Gift Summary object, we recommend reviewing these key areas:

- On the Donor Gift Summary object, the standard field and calculations provided by Nonprofit Cloud
- Identify any custom fields or calculations that may be needed

- If custom fields or calculations are needed, review the relevant DPE Definition and the operations occurring in each node to understand whether the standard calculation needs to be updated

Also See:
- Clone Templates for Fundraising Data Rollups and Lists
- Configure a Data Summary Rollup

Managing Relationships & Affiliations

Enabling & Tracking Inter-Personal Relationships

Group Membership

Before you begin: *Review these doc sets before implementing functionality around tracking and managing relationships:*
- Group Membership & Households (Help & Training, Docs)
- Define Groups & Relationships Between Individuals & Groups (Help & Training, Docs)
- Create Groups and Relationships (Help & Training, Docs)
- Create Groups by Using a Guided Flow (Help & Training, Docs)
- Merge & Split Groups by Using Guided Flows (Help & Training, Docs)
- Group Membership Developer Resources (Developer, Docs)

Introduced as an Industry solution for common use cases, Group Membership was designed to build relationships between people-to-people and organization-to-organization. Group Membership gives you the tools to create the connecting record, either Contact-Contact Relationship (CCR) between people or Account-Account Relationship (AAR). You can also define the role between the two records using the Party Role Relationship record.

Once applied to a Stakeholder use case, the CCR and AAR records build the lateral relationships we'd expect to peers. Here is a diagram that shows the direction of relationships. It also shows how Group Membership uses the same common Party Role Relationship object to connect both types of records.

Important: Within Nonprofit Cloud (NPC) and Group Membership, there are system-level checks and rules that make sure that a CCR record can only join a Contact with another Contact through the Contact lookup. AAR records can only connect Business Accounts with each other through the Account lookup. AARs cannot be used to associate Person Accounts to one another.

This diagram displays how both the Contact Contact Relationship and Account Account Relationship constructs organize themselves to connect related records to one another. Notice that:

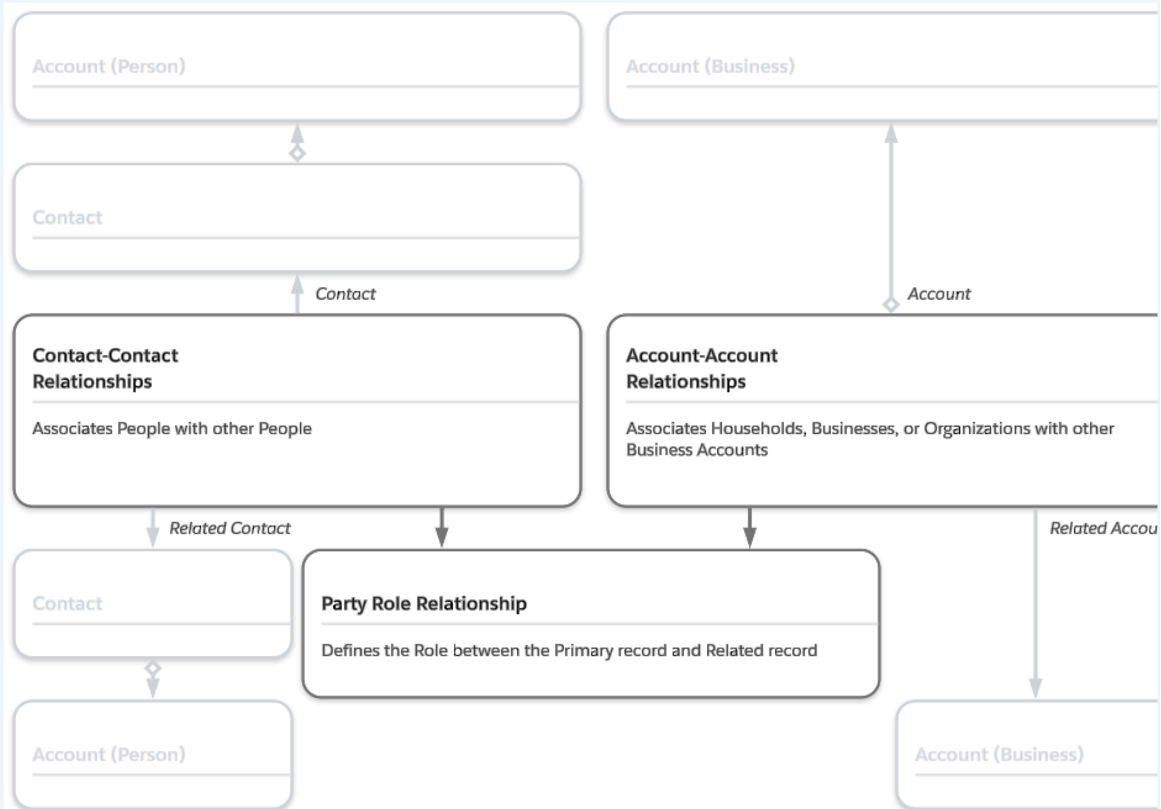
1. Contact Contact Relationships look at the Contact first, even if you use Person Accounts. Account Account Relationships only look at Business Account records in the Account object to connect.
2. Both objects utilize the Party Role Relationship object to define the specific relationship between the two records – so Party Role Relationship records will have a definition field to help understand whether the relationship should be available for Contact Contact or Account Account Relationship records.

Party Role Relationship record names are made using the Role Name + Related Role Name, with the prefix of the relationship type (CCR or AAR). This creates a record name like Parent-Child-CCR or Referrer-Service Provider-AAR. This is an automation at the system level, and populates a restricted Name field for the record.

Important:

- As of Spring ‘25, an implementer can't change the naming convention of Party Role Relationship records. End users will need to be trained on using the existing naming convention or change business processes if needed.
- When creating Party Role Relationship records, the checkbox Create Inverse Role Automatically creates the inverse record that an implementer is creating, however the original record’s Related Inverse Record lookup will need to be updated with the record

created by the automation.



- When you use the Create Inverse Role Automatically checkbox, it won't initiate an automation to make reciprocal CCR or AAR records–only Party Role Relationship records. To create reciprocal CCR or AAR records, you'll need an automation flow.

When you plan to create Party Role Relationship records, especially between stakeholders, you should talk to the customer about these main patterns.

- Descriptive Naming (Father, Mother, Son, Daughter)
- Non-Descriptive, Generic Naming (Spouse, Parent, Child)

The level of detail and complexity of the customer's needs likely will decide which pattern to use, and there can be situations where both are used (for example non-descriptive is used until data is validated and can be updated to descriptive).

In both scenarios, consider the reciprocal relationship or relationship pairing. For example, Role A relates to Role B. If Role A has multiple relationships, plan for each pair of possibilities.

- Role A relates to Role B and Role B relates to Role A (For example, Mother-Daughter and Daughter-Mother).
- Role A relates to Role C and Role C relates to Role A (For example, Mother-Son and Son-Mother).

Important: If a customer's requirement or request is that one Role can be related to multiple other roles without each pairing, a custom solution will need to be explored.

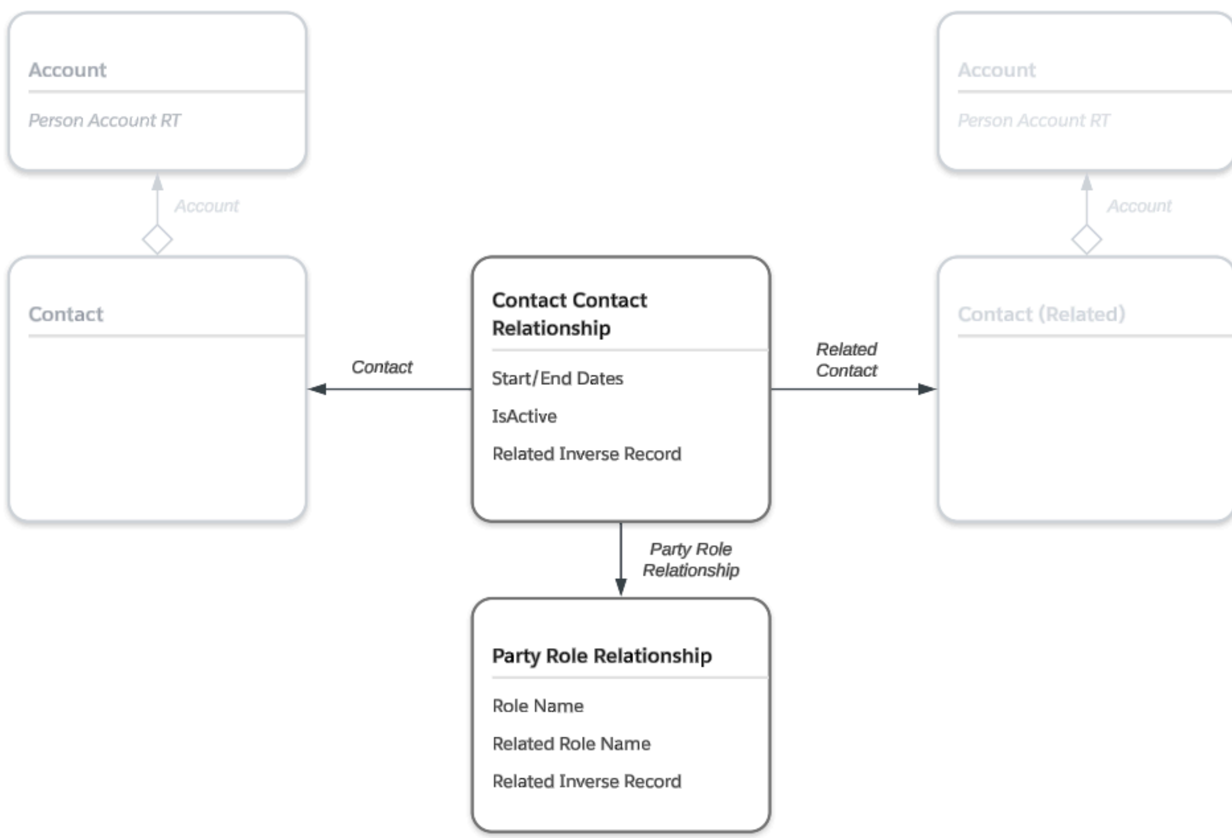
Implementers can also encounter situations where a role has no inverse. For example, a role of Spouse-Spouse. If this happens, implementers have a few options.

- Leave the *Related Inverse Record* lookup field blank if no reciprocal automation is planned.
- Create the record, then update the record with its own Id if reciprocal automation is planned.

Contact Contact Relationship

The Contact Contact Relationship object is designed to connect people to one another, or lateral/peer relationships. In real life, relationships can have a reporting or hierarchical nature (for example, professional relationships or parent-child relationships). However, the system treats Contact Contact Relationships as simple points of contact that show a connection. This is different from relationships with Accounts, which use the Account Contact Relationship object.

Here's a quick overview of how Contact Contact Relationships create relationships among people:



Consideration: It is important to precisely understand the possible classifications an organization uses when identifying relationships. This will help you scope the level of effort or work appropriately. Here's an example scenario. Imagine a community service organization needs to track a child's parents, guardians, and potential emergency contacts. When collecting information, the organization may not have specific details on the role a person has with the child. For instance, they may know them first as a relative, then a grandparent, and finally, they validate that the person is the child's grandmother. If this scenario happens, create two of each of these records.

1. Relative (child and its inverse)
2. Grandparent (child and its inverse)
3. Grandmother (child and its inverse)

As role classifications expand to become more descriptive, like Grandfather, Aunt, or Uncle, this record count can grow quickly. It's important to account for possible variations. Consider this process.

For this example, you learn that there's a relationship between Terri and Christopher. In a service organization, the policy says the organization must track all possible relationships. So, a Contact Contact Relationship is created between the two, but there is not enough information to tell us what the two are to each other. Later, the organization finds out that Terri is a family member of Christopher. So, the CCR record is changed to the right Party Role Relationship. After receiving updated information, a program manager identifies Terri as Christopher's grandparent. Later, Terri is specifically identified as Christopher's grandmother. Both of these relationships will require a Party Role Relationship record and potentially a paired inverse.

Here's a list of typical Party Role Relationships among familial Contacts.

Primary Role	Related Role	Inverse Record	Notes
Parent	Child	Child-Parent-CCR	Person is the parent of...
Child	Parent	Parent-Child-CCR	Person's parent is...
Guardian	Child	Child-Guardian-CCR	Person is the guardian of...
Child	Guardian	Guardian-Child-CCR	Person's guardian is...
Spouse	Spouse	(Looks up to Self)	Person is the spouse of...
Partner	Partner	(Looks up to Self)	Person is the partner of...
Mother	Child	Child-Mother-CCR	Person is the mother of...
Child	Mother	Mother-Child-CCR	Person's mother is...
Father	Child	Child-Father-CCR	Person is the father of...
Child	Father	Father-Child-CCR	Person's father is...

Husband	Spouse	Wife-Spouse-CCR	Person is the Husband of...
Wife	Spouse	Spouse-Wife-CCR	Person is the Wife of...
Husband	Wife	Wife-Husband-CCR	Person is the Husband of...
Wife	Husband	Husband-Wife-CCR	Person is the Wife of...
Husband	Husband	(Looks up to Self)	Person is the Husband of...
Wife	Wife	(Looks up to Self)	Person is the Wife of...
Sibling	Sibling	(Looks up to Self)	Person is the sibling of...
Sister	Brother	Brother-Sister-CCR	Person is the sister of...
Brother	Sister	Sister-Brother-CCR	Person is the brother of..
Grandparent	Grandchild	Grandchild-Grandparent-CCR	Person is the grandparent of..
Grandchild	Grandparent	Grandparent-Grandchild-CCR	Person's grandparent is...
Grandmother	Grandchild	Grandchild-Grandmother-CCR	Person is the Grandmother of...
Grandchild	Grandmother	Grandmother-Grandchild-CCR	Person's Grandmother is...
Grandfather	Grandchild	Grandchild-Grandfather-CCR	Person is the Grandfather of...
Grandchild	Grandfather	Grandfather-Grandchild-CCR	Person's Grandfather is...

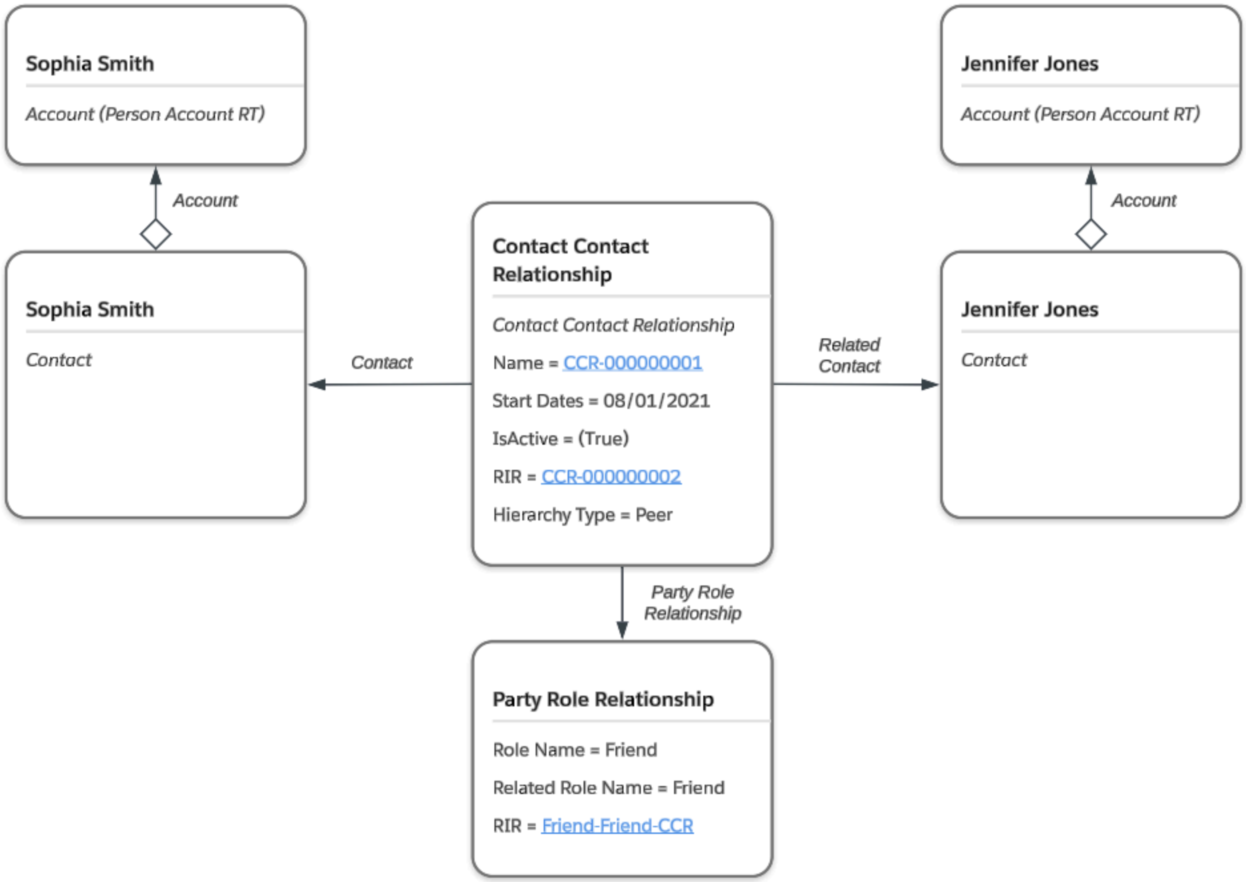
This list may not be complete, but it is a good place to start talking to your customer to see if these or other family relationships are needed.

The Contact Contact Relationship construct supports non-familial relationships as well, such as professional or inter-personal. Here are some typical Party Role Relationships between professional or non-familial inter-personal Contacts:

Primary Role	Related Role	Inverse Record	Notes
Friend	Friend	(Looks up to Self)	Person is the friend of...
Co-worker	Co-worker	(Looks up to Self)	Person is the co-worker of...
Employee	Manager	Manager-Employee-CCR	Person is the employee of...
Manager	Employee	Employee-Manager-CCR	Person is the manager of...
Referrer	Referee	Referee-Referrer-CCR	Person referred...
Referee	Referrer	Referrer-Referee-CCR	Person was referred by...
Case Manager	Case Assignee	Case Assignee-Case Manager-CCR	Person is a Case Manager of...

Case Assignee	Case Manager	Case Manager-Case Assignee-CCR	Person is a Case Assignee of...
Case Worker	Client	Client-Case Worker-CCR	Person is a Case Worker for...
Client	Case Worker	Case Worker-Client-CCR	Person is a Participant for...
Grant Provider	Grantee	Grantee-Grant Provider–CCR	Person is a Grant Provider for...
Grantee	Grant Provider	Grant Provider-Grantee-CCR	Person is a Grantee for...
Teacher	Student	Student-Teacher-CCR	Person is a Teacher of...
Student	Teacher	Teacher-Student-CCR	Person is a Student of...
Board Member	Board Member	(Looks up to Self)	Person is a Board Member with...
Advisor	Advisee	Advisee-Advisor-CCR	Person is the Advisor to...
Advisee	Advisor	Advisor-Advisee-CCR	Person is the Advisee of...
Counselor	Client	Client-Counselor-CCR	Person is the Counselor for...
Client	Counselor	Counseler-Client-CCR	Person is the Client of...
House Manager	Resident	Resident-House Manager-CCR	Person is the Resident of...
Resident	House Manager	House Manager-Resident-CCR	Person is the House Manager for...

Tracking relationships among peers is critical for business processes for a variety of reasons. Here's an example of a relationship diagram between Sophia Smith and Jennifer Jones who are friends. This is an important relationship to track if a fundraiser is trying to understand Sophia's sphere of influence, or if a legal advocate is building a case for a client and needs to better understand their community.



Note: *RIR = Related Inverse Record*

Important: Not all relationships will be defined using this Group Membership. Account Contact Relationship objects are used to connect people and organizations. Group Membership is a different type of object and has different fields.

Considerations: When mapping and building relationships between individuals, consider these situations.

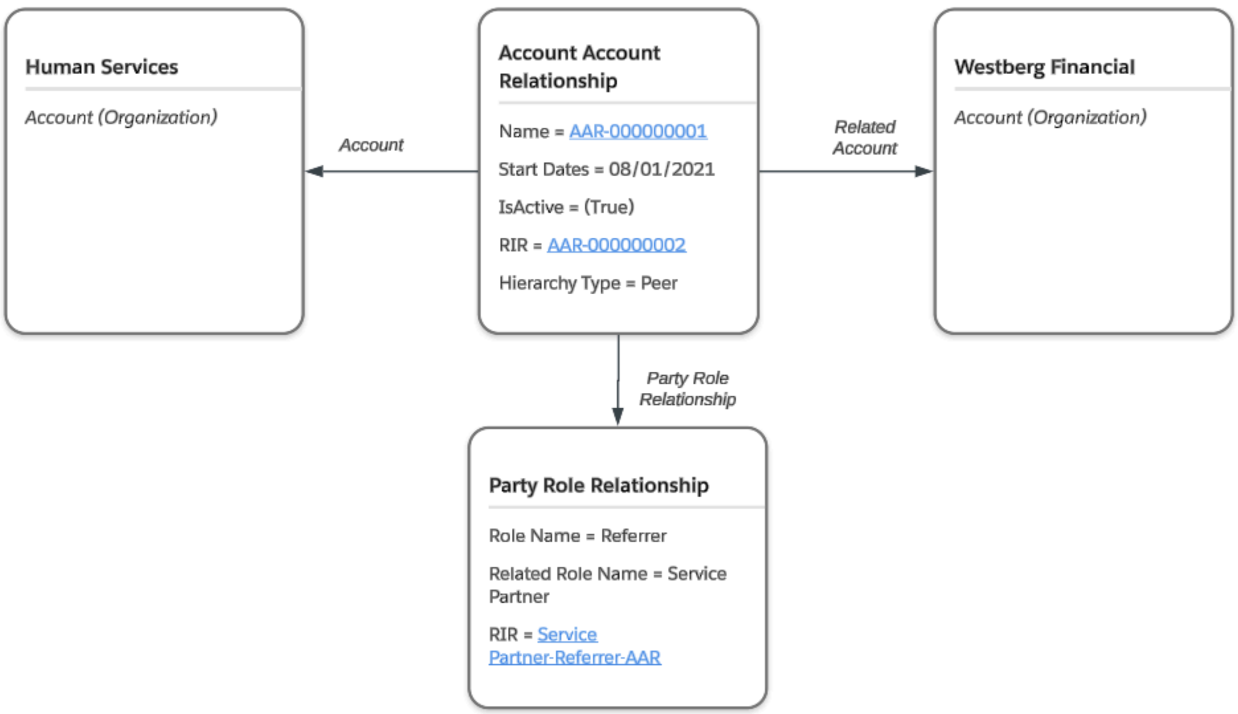
- An individual has a previous relationship with someone that has been defined with an End Date value, however a new relationship record is needed as the relationship is re-established. For example, Mary and Sophia were co-workers previously, but Mary left her role in 2023. However, Mary has re-joined the organization, and Sophia has listed her as a co-worker again. In this case, two CCR records would be created, however only ***one*** can be active. The system has a validation that will prevent duplicate CCR records between two individuals who share the same role from both being Active.
- An individual has multiple relationships with the same person. For example, Marcus is Harold's nephew, and the two are co-workers for Westberg Financial. If the company wants to

see both who Marcus is related to and any people Marcus works with, two CCR records would be created. One record would be for each role Marcus shares with Harold.

Account Account Relationship

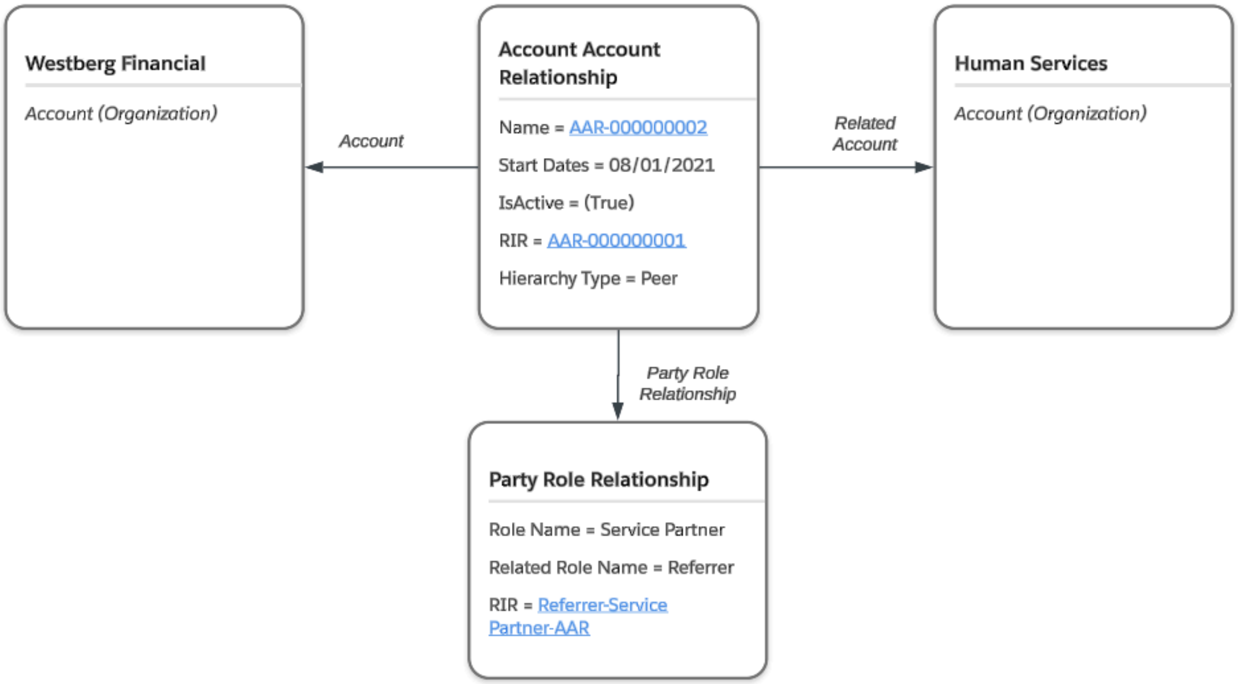
This object follows a similar structure to Contact Contact Relationship, however is designed to associate Business Accounts to one another. An example is Sophia Smith's employer, *Westberg Financial*. Westberg Financial is giving back to the community. They offer a work-training program to people who need help with money or who want to start working in financial planning.

Sophia's local Community Human Services office has a partnership for placement with Westberg Financial, and wants to track this relationship in Nonprofit Cloud. In this case, Account Account Relationship records would be created between both organizations. The Party Role Relationship would define the role of the relationship.



Note: *RIR = Related Inverse Record*

To continue to connect the dots, here's what the reciprocal relationship looks like.



This is the same behavior as CCR, where the primary Account is Westberg Financial and the related is the Human Services account. Notice the Party Role Relationship record changes to the Reverse Inverse Relationship record used in the lookup from the original AAR's Party Role Relationship.

Consideration: Similar to Contact Contact Relationships, Account Account Relationships can support multiple AAR records between two Accounts. Records with the same Role provided only one AAR record is marked Active.

Enabling & Tracking Affiliations to Accounts

Account Contact Relationships

Before you begin: Review these doc sets to prepare for implementing or using functionality around tracking and managing relationships:

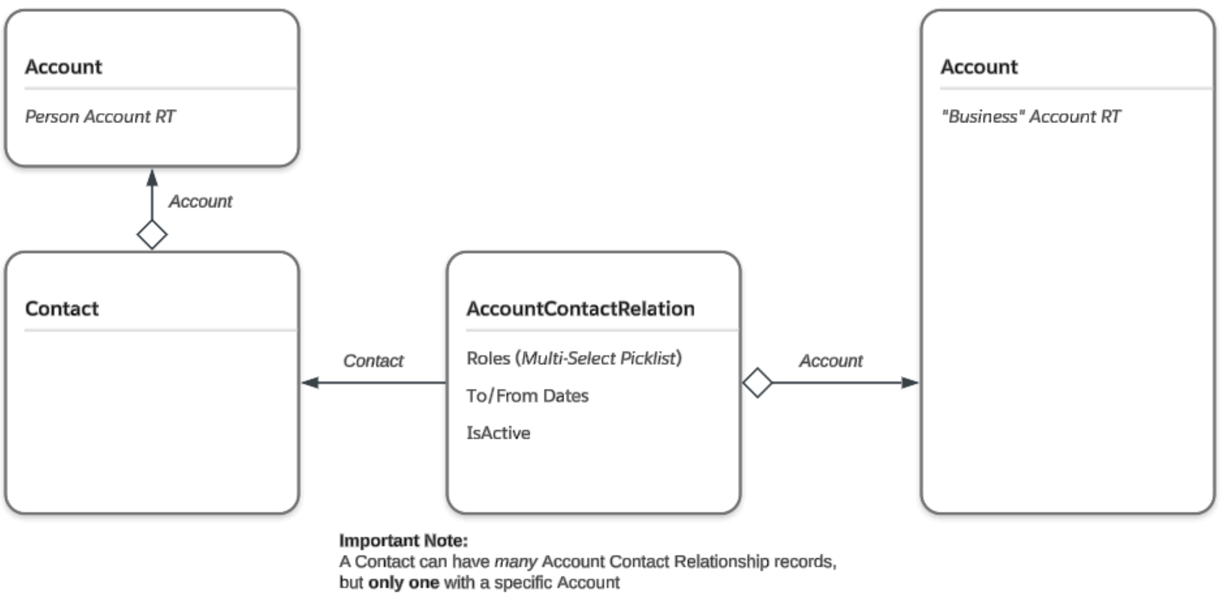
- *Salesforce Help:* Set Up Contacts to Multiple Accounts
- *Salesforce Help:* Account Contact Relationship Fields
- *Developer Guide:* Account Contact Relationship
- *Trailhead:* Understand Account & Contact Relationships
- *Salesforce Help:* Define Groups & Relationships Between Individuals & Groups
- *Salesforce Help:* Create Groups and Relationships
- *Salesforce Help:* Create Groups by Using a Guided Flow
- *Salesforce Help:* Merge & Split Groups by Using Guided Flows

Account Contact Relationship is a basic feature in Sales Cloud. It lets a person be linked to many Account records, even if the Contact object is not looking up an Account. These relationships show in the Related object related list (Related Accounts for the Contact, Related Contacts for the Account).

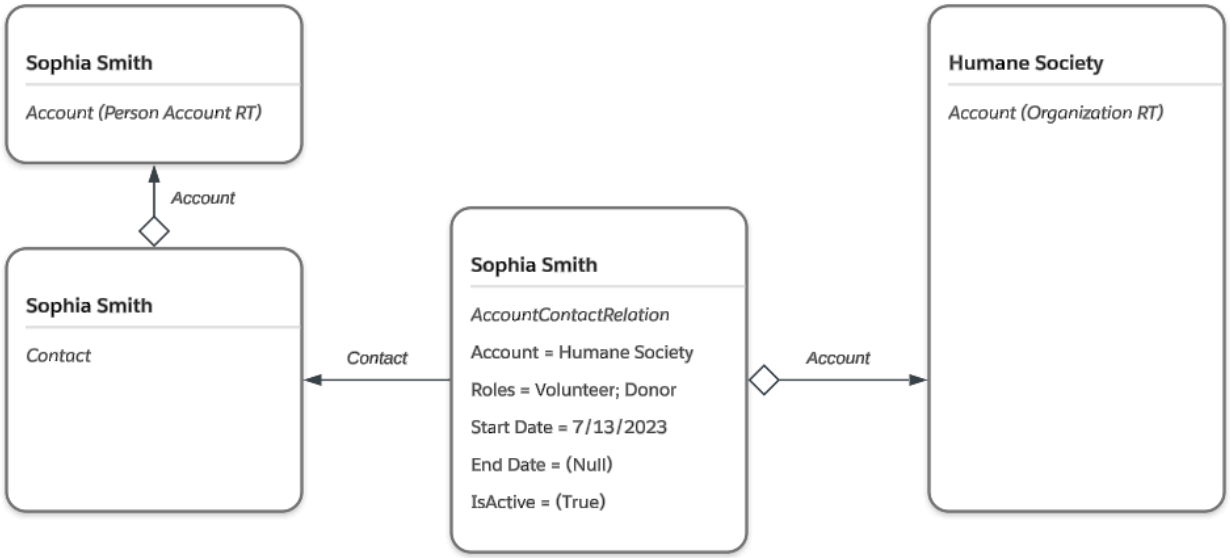
Important: If implementers do not see the Account Contact Relationship object in Object Manager or the Related Contacts related list for the Account Page Layouts/interface options, it is likely this configuration setting has not been enabled in Setup. However, be aware that once enabled, there is no tab in App Launcher to interact with the object directly. You can only interact with the object through the related lists or a custom solution like Flow or LWC.

Also, when using Person Accounts, both Related Accounts and Contacts will display as related list options. We recommendthat implementers only use the Related Accounts related list as Contacts should be connected with the Contact Contact Relationship functionality only.

Here's an overview of the basic object model between a person and a Business Account. Note that the Roles picklist is multi-select, meaning all roles that a person has with the organization or Business Account would be reflected in this field.



Here's an example of Sophia's affiliation with her local Humane Society, where she is both a volunteer and donor.



Considerations: When you evaluate and prepare the Account Contact Object, keep these things in mind.

- **One-to-One or Singularity**
  Account Contact Relationship lets only one record exist between a person and the Business Account they are connected to. This is even if the record has the Active checkbox checked. A system-level validation will prevent additional records from being created between the two.
- **Roles Multi-Select Picklist**
  Multi-select picklists can cause issues with both automations and reporting, so it's important to understand whether any critical requirements or reporting needs will be impacted by this behavior
- **Date Fields & Non-continuous Roles**
  At times, a person's role may change, and because only one record can exist between the person and a Business Account, you need a strategy to account for start dates, end dates, and the changing of roles. See [Considerations for Implementing Relationships and Affiliations](#).
- **Name Field**
  Account Contact Relationship doesn't have a Name field. Instead, the UI makes a link from the Contact who the Account Contact Relationship refers to.
- **Direct Field**
  This field indicates whether the Account associated with the Contact is the account used for the Account lookup field on the Contact's record. While this field is read-only, it should be a field that is considered and accounted for while building automations and integrations.
- **Setup Configuration**
  When enabling this feature setting in Setup, review and discuss the two configuration options for managing system behavior for when users delete an account that has direct contacts that are related to other accounts, and when users replace the primary account on a contact record.

Considerations for Implementing Relationships and Affiliations

Putting these two constructs together will lead to several key questions that should be answered as implementers plan their solution and approach.

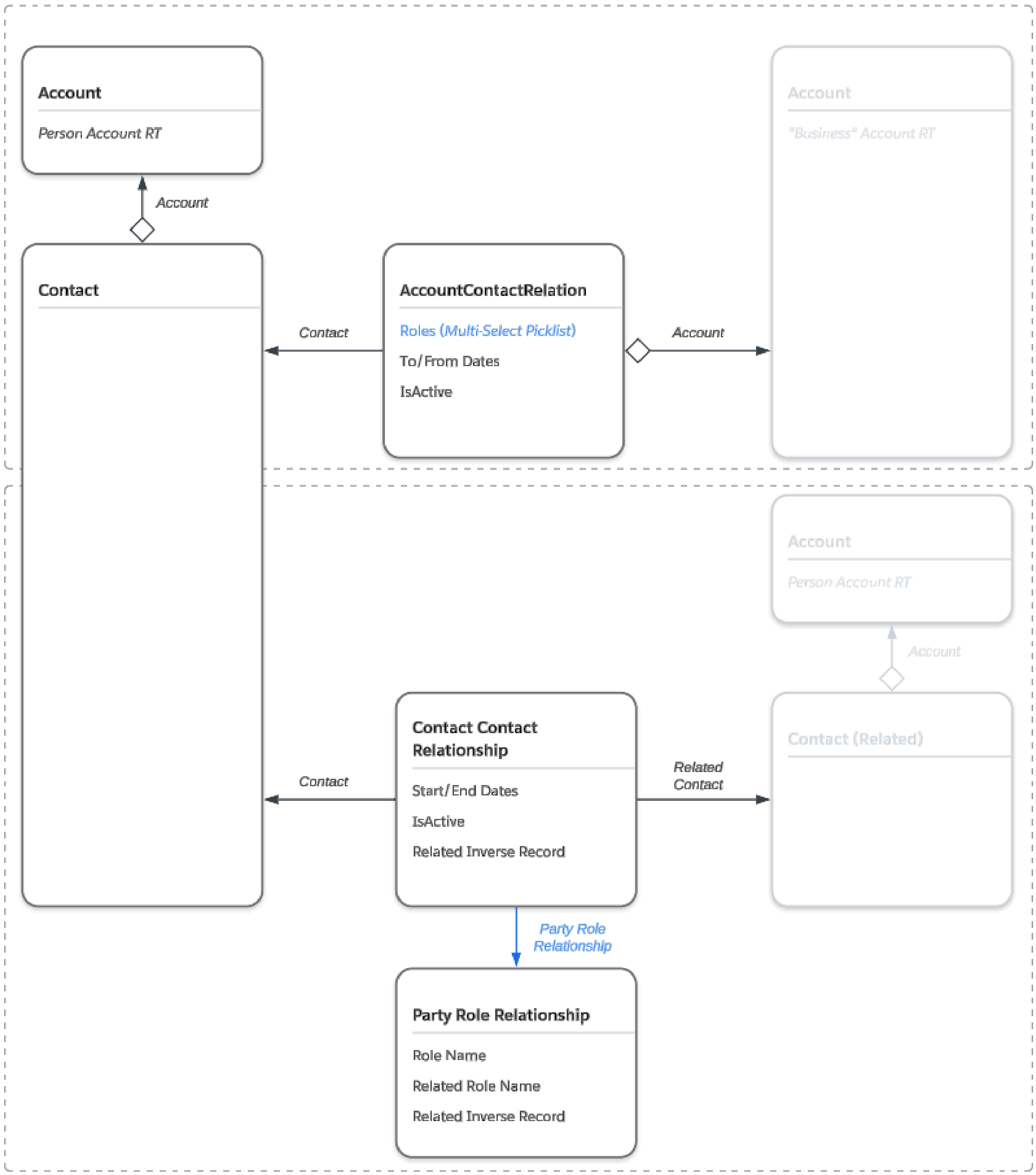
- These data models are similar, and the relationship objects have some similar features. However, Account Contact Relationship does not have the one-to-one or singularity requirement for either Contact Contact Relationship or Account Account Relationship. Will this affect the implementation?
  - Can a person have multiple roles with an organization or Business Account, and does the customer need to see both active and inactive roles?
- When maintaining Account Contact Relationship affiliations, are dates needed for *each* role, not the overall start and end date of the person's relationship with the organization?
  - Does each role need a status (e.g., Active or Inactive)?
- When you define the roles a person has with an organization or Business Account, is the picklist sufficient to define those roles?
  - Is other data about the role needed or required?
  - Are analytics or reporting requirements impacted by the picklist field type?

Review this cheat sheet that shows how these constructs align and differ.

Object Name	Designed For...	Key Relationship Field Type	Relationship Defined By...	1-to-1 Relationship Enforcement
Contact Contact Relationship	Associate People to People	Lookup	Party Role Relationship object	Yes, but only when one **Active** record with matching PRR
Account Account Relationship	Associate Business Accounts to Business Accounts	Lookup	Party Role Relationship object	Yes, but only when one **Active** record with matching PRR
Account Contact Relationship	Associate People to Business Accounts	Multi-Select Picklist	Role Multi-Select Picklist field	Yes

Note: *PRR = Party Role Relationship*

This diagram combines the two object models previously discussed, so you can easily compare them.



If there's an impact to requirements caused by the behavior or design of either the Group Membership objects or Account Contact Relationship, you can create a custom solution.

It's best for the person who uses the system to look at how each part works. They should find which part works best and fix the part that doesn't.

Important: It's recommended that for visualizing relationships, implementers use Actionable Relationship Center (ARC) to show relationships. This interface allows for both standard and custom actions to be used for record creation from the graph UI.

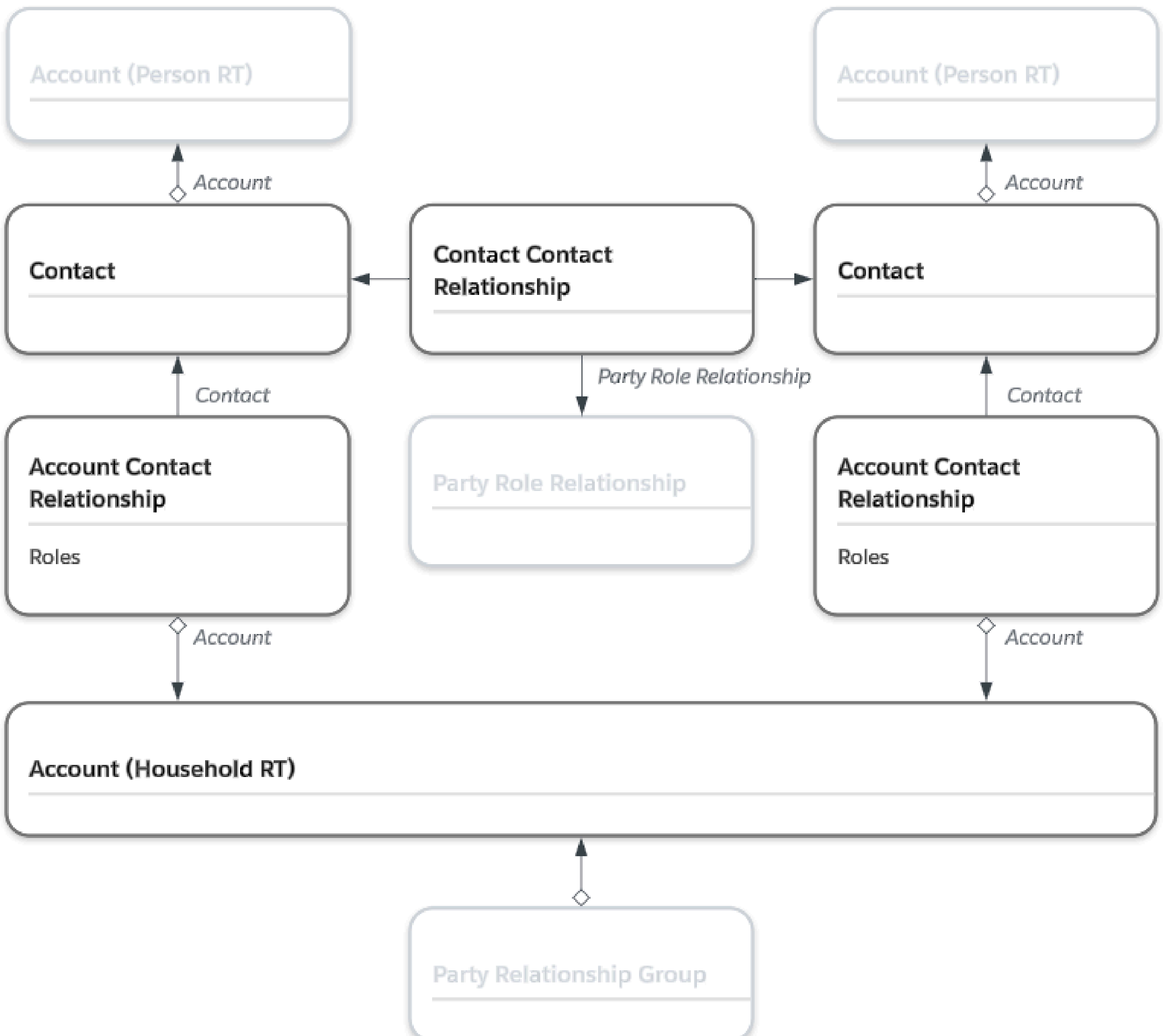
Householding with Account Contact Relationships and Group Membership

Before you begin: Review these doc sets to prepare for implementing or using functionality around tracking and managing households:

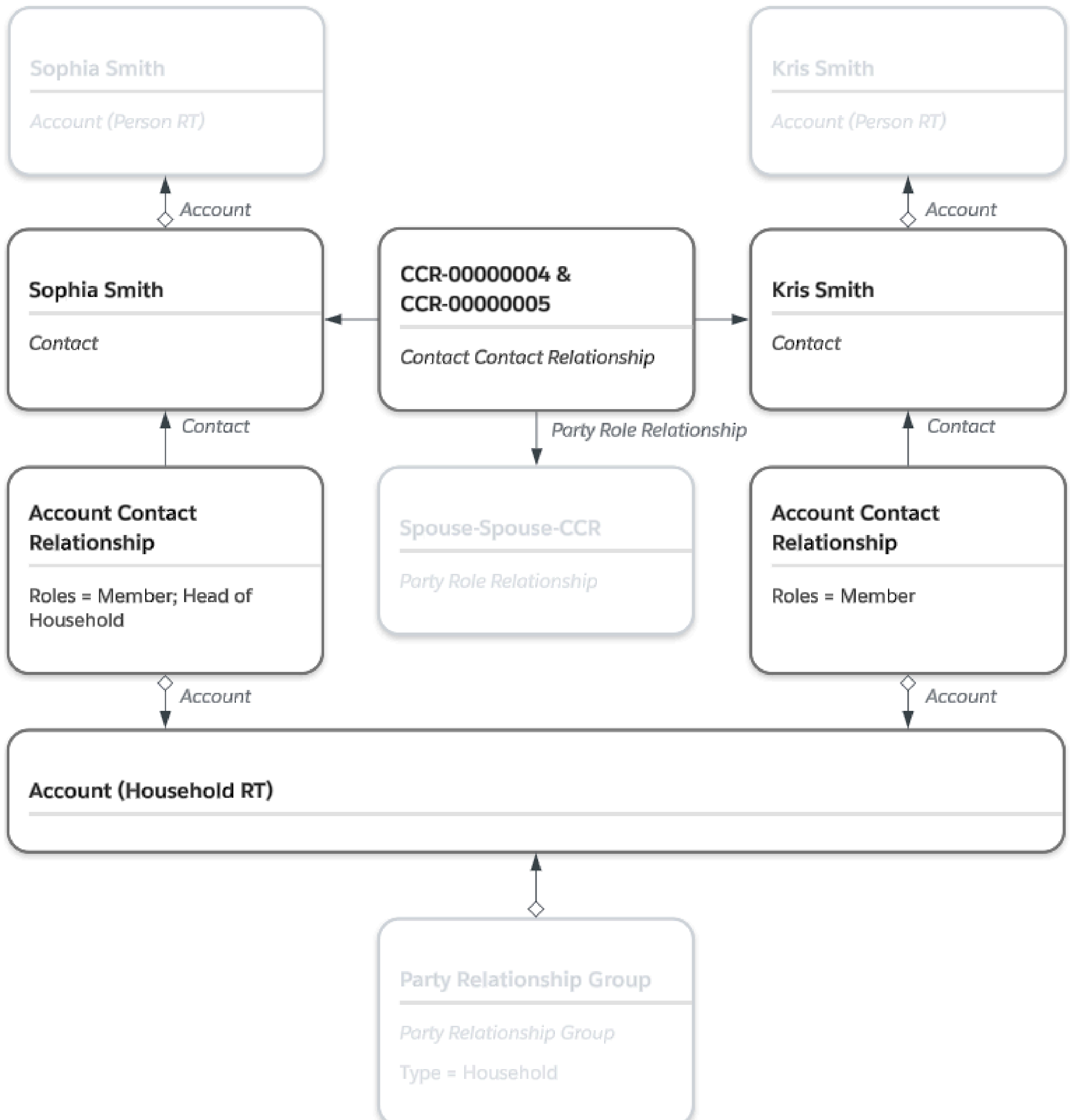
- *Developer Guide:* Party Relationship Group
- *Salesforce Help:* Define Groups & Relationships Between Individuals & Groups
- *Salesforce Help:* Create Groups and Relationships
- *Salesforce Help:* Create Groups by Using a Guided Flow
- *Salesforce Help:* Merge & Split Groups by Using Guided Flows
- *Trailhead:* Manage Households

When discussing "households" within Nonprofit Cloud, implementers should understand it is the idea of an individual and their related family members associated to an Account record which identifies their household.

This means building and constructing households uses both elements from Account Contact Relationship to associate individuals to a Business Account (Household) and Group Membership (Contact Contact Relationship) to associate individuals to one another. Here's a diagram to help illustrate a typical design:



Here's how Sophia Smith's basic household is constructed with her spouse, Kris:



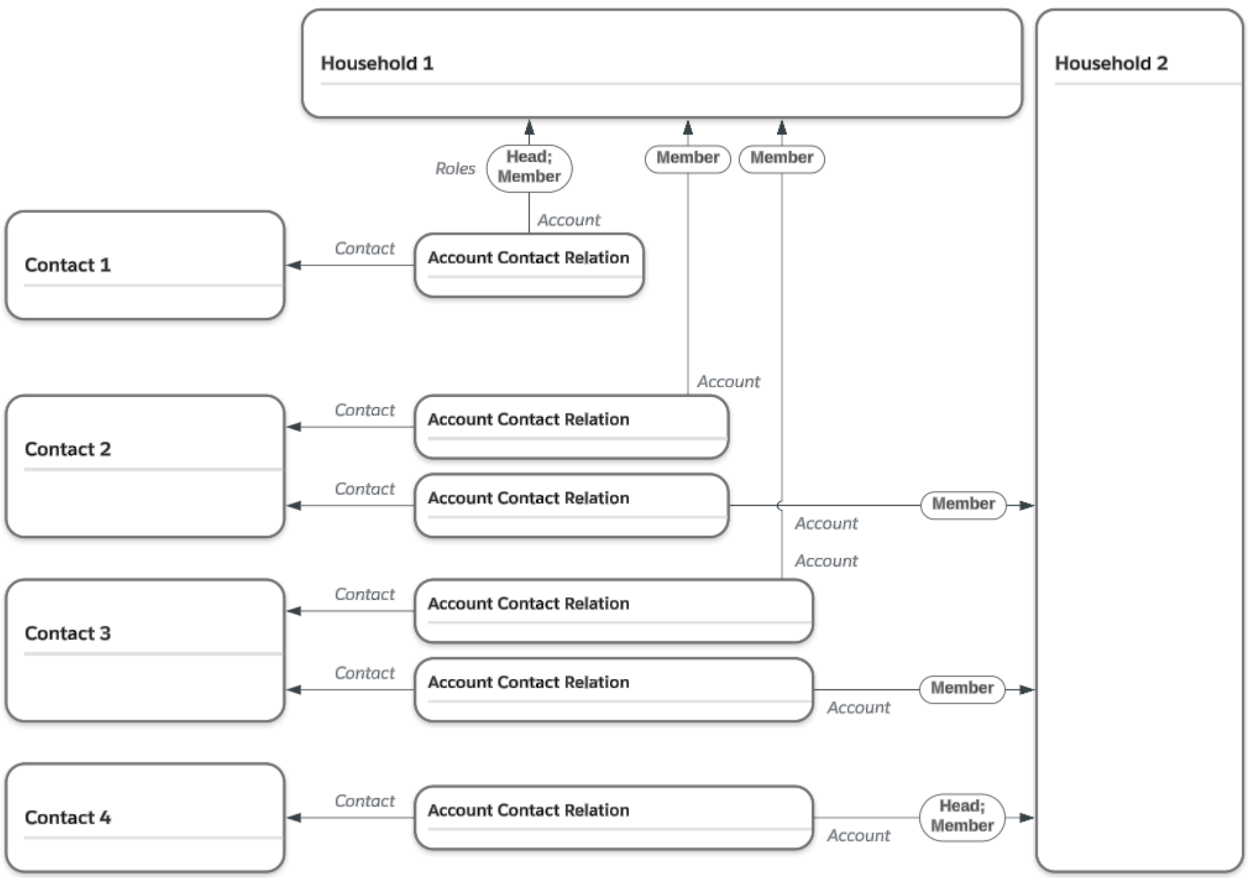
This model is perfect for simple, nuclear families. But don't worry, it can handle more complex situations too. With a little bit of data organization, you can use this model to represent any household situation. Here are some examples:

Household Type	Household Accounts	How to organize Contacts	Notes
Split/Separated Household	2 Households: one Household for each parent or guardian	Contacts have ACR records adding them to both households	This may only be needed if a Contact claims residence outside of a single address

Shared Custody	2 Households: one Household for each custodial parent	Contacts have ACR records adding them to both households	Where the Contacts reside or receive mail may help dictate the organization for this use case
Non-biological Parent Guardian/Custodial Parent	1 Household	Contacts who share the residence or address have ACR records adding them to the household	Assuming the biological parent(s) are not involved
Multi-Generational	**Scenario 1:** 1 Household **Scenario 2:** Potentially multiple Households for each unit which share a roof or home address	**Scenario 1:** All Contacts have ACR records to the single household **Scenario 2:** Each Contact has an ACR record associating them to a household in which they reside at part-time or fill-time	Data organization would be determined by whether all people in the household share a roof – if yes, scenario 1 is the best outcome. If no, scenario 2 may be best outcome.

Note: *ACR = Account Contact Relationship*

Here is a diagram to show how the records may be organized for a split household situation:



Party Relationship Group

To help define Accounts, and most importantly Households, the Party Relationship Group object is from the Industries data model. It is an optional object that allows data to be collected and defined about an Account. It is important that implementers understand the use of these fields:

- **Category**
  This field can be customized, and it's used to define the types of Groups or Households that you want to track. For example, you could track Households that share an address or Groups that share meals together.
- **Type**
  This field is a restricted picklist that defines whether the party group is a household or a group of people. This field is often used to explain or bucket the Category value.
- **Subtype**
  This field can be customized, which lets you add a more detailed description based on whether it's a group or a household. For example, you can use values like nuclear household, split or separated household, or multi-generational household.

Some additional considerations and behaviors should also be tested or evaluated for its use:

- **One-to-One or Singularity**
  Just like with Contact Profile or Account Contact Relationship, there can be only one Party Relationship Group record per Business Account. This is true even when the account is inactive.
- **Person Accounts**
  Party Relationship Group records can't be created for Person Accounts. A system-level validation throws a generic error asking the user to review the Account ID field but no additional details.
- **Not Required, but Highly Recommended**
  While this object is recommended, it's not required for every use case. Features like Household Donor Gift Summary rollups use this object, so review the functionality and determine if there's any reason not to use it.

  Note: Take a look at the interface and automation provided with Party Relationship Group in the Before You Begin section.
- **Primary Address**
  The Primary Address field on the object isn't currently synchronized with out-of-the-box automation. To learn more about managing stakeholder addresses, see [Manage Constituent Addresses].

Also included with the Party Relationship Group object are the automations and guided flows shared in the ***Before You Begin*** for this Householding section. It's worth reviewing these links and understanding how this flow can make the process easier for not just managing households, but also groups and related Business Accounts. These flows manage the creation and updating of these records.

- Contact Contact Relationships between household members.
- Account Contact Relationships between members of the household and their associated organizations.

- Account Account Relationships between the household or group and it's other associated Business Accounts.

Conclusion

Now that you've familiarized yourself with the fundamental building blocks of Stakeholder Management in Nonprofit Cloud, we hope you feel better prepared to implement this solution to meet your needs. For additional information, check out these resources. And if you have further questions, or comments about this guide, post in the Nonprofit Cloud group in the Trailblazer Community. Happy implementing!

Resources

Salesforce Help: Nonprofit Cloud Documentation
Salesforce Help: Nonprofit Cloud Group Membership and Households Data Model
Trailhead: Nonprofit Cloud Stakeholder Management
Trailhead: Nonprofit Cloud Badges and Trails Trailmix
Trailhead: Industry Common Features in NPC Trailmix
Trailblazer Community: Nonprofit Cloud

Appendix

Nonprofit Cloud Core Permission & App Inventory

Name	Metadata Type	Description	Related License/Dependency
ARC Access	Permission Set	Enables user access to Actionable Relationship Center features	Actionable Relationship Center PSL
Access Accounting Subledger Growth	Permission Set	Access and use Accounting Subledger Growth features	Accounting Subledger Growth Base PSL
Action Plans	Permission Set		Action Plans PSL
Actionable Segmentation	Permission Set	Gives users access to objects and features for Actionable Segmentation	Industries Sales Excellence PSL
Advanced CSV Data Import	Permission Set	Gives access to advanced CSV file import features	CSV Advanced Data Import PSL
Advanced Program Management	Permission Set	Provides access to benefit scheduling, complaint management, and related objects	Advanced Program Management PSL
Basic CSV Data Import	Permission Set	Gives access to import a CSV File	CSV Basic Data Import PSL

Business Milestones and Life Events Access	Permission Set	Allows internal org users to access Business Milestone and Life events features	Business Milestones and Life Events Access PSL
Care Plans Access	Permission Set	Allows internal org users to access Care Plans objects and features	Care Plans PSL
Case Referral	Permission Set	Allow internal org users to access Referral functionality	Case Referral PSL
Complaints Management Access	Permission Set	Provides access to Complaints Management features and objects	Complaints Management Access PSL
Data Pipelines Base User	Permission Set	Use Data Pipelines Base	Data Pipelines Base User PSL
Decision Explainer CC	Permission Set		Decision Explainer Site PSL
Decision Explainer Service Access	Permission Set	Provides access to Decision Explainer Service features and objects	Decision Explainer PSL
DocGen Designer	Permission Set	Allows users to create and edit document templates	DocGen Designer PSL
DocGen Runtime Community User	Permission Set	Allows users to generate documents in communities	DocGen Runtime for Community Users PSL
DocGen Runtime User	Permission Set	Allows users to generate documents	DocGen Runtime User PSL
DocGen User	Permission Set	Allows users to generate documents	DocGen Designer PSL
Document Checklist	Permission Set	Allows the user to access the Document Checklist feature	Document Checklist PSL
Dynamic Assessment Access	Permission Set	Provides internal user with access to Dynamic Assessment features and objects	Dynamic Assessments PSL
Einstein Case Classification User	Permission Set	Provides access to Einstein Case Classification feature	Einstein Agent PSL
Einstein Case Wrap-Up User	Permission Set	Provides access to Einstein Case Wrap-Up feature	Einstein Agent CWU PSL
Financial Services Cloud Compliant Data Sharing	Permission Set	Grant users access to participant management and advanced configuration for Compliant Data Sharing	Compliant DataSharing PSL
Fundraising Access	Permission Set	Gives users access to Fundraising objects and components	Fundraising Access PSL
Grantmaking Manager	Permission Set	Gives users the permissions to manage grant opportunities, applications, reviews, budgets, and funding awards	Grantmaking User PSL
Group Membership	Permission Set	Enables Household and Group features in the org	Group Membership PSL
Industries Visit	Permission Set	Enable Industries Visit features	Industries Visit PSL
Industry Service Excellence	Permission Set	Gives the admin access to objects and features for Industry Service Excellence	Industry Service Excellence PSL

Interaction Summary	Permission Set	Enables Interaction Summary feature in the org	Industries Interaction Summary PSL
Manage Accounting Subledger	Permission Set	Access and manage Accounting Subledger features	Accounting Subledger Admin PSL
OmniStudio Admin	Permission Set	Allows admin users to configure OmniScripts, DataRaptors, Integration Procedures, and FlexCards. This permission set also provides calculation runtime access	OmniStudio PSL
OmniStudio User	Permission Set	Allows users to execute OmniScripts, DataRaptors, Integration Procedures, and FlexCards. This permission set also provides calculation runtime access	OmniStudio PSL
OmniStudio User	Permission Set	Allows users to execute OmniScripts, DataRaptors, Integration Procedures, and FlexCards. This permission set also provides calculation runtime access	OmniStudio User PSL
Outcome Management	Permission Set	Provides access to manage outcomes, indicators, and impact strategies	Outcome Management PSL
Outcome Management for Experience Cloud	Permission Set	Provides access to manage outcomes, indicators, and impact strategies from an Experience Cloud site	Outcome Management for Experience Cloud PSL
Program and Benefit Management Access	Permission Set	Allows internal org users to access Program and Benefit Management objects and features	Program and Benefit Management PSL
Program and Case Management for Experience Cloud	Permission Set	Gives Experience Cloud site users access to the Program and Case Management features	Program and Case Management for Experience Cloud Sites PSL
Provider Management Access	Permission Set	Enables user access to all Provider Management objects and features	Provider Management PSL
Query for Datapipelines User	Permission Set	Use Query for Datapipelines	Query for Datapipelines User PSL
Record Aggregation Access	Permission Set	Provides users access to Record Aggregation features and objects	Record Aggregation PSL
Rule Engine Community Runtime	Permission Set	Allows the user to access features for Business Rules Engine Community Runtime	Business Rules Engine Runtime for Communities PSL
Rule Engine Designer	Permission Set	Provides read and edit access to the calculate run time objects	Business Rules Engine Designer PSL
Rule Engine Runtime	Permission Set	Provides read access to the calculate run time objects	Business Rules Engine Runtime PSL
Run Accounting Subledger Job	Permission Set	Run Accounting Subledge jobs	Accounting Subledger Automation PSL
Tableau Einstein Included App Business User	Permission Set	Allows view-only access to the pre-packaged Tableau Einstein analytics installed in orgs.	Tableau Einstein Included App PSL

Tableau Included App Manager	Permission Set	Allow manage Tableau Included Apps	Tableau Einstein Included App PSL
Fundraising_Admin	Permission Set Group		
Fundraising_User	Permission Set Group		
Accounting Subledger Admin	Permission Set License		
Accounting Subledger Automation	Permission Set License		
Accounting Subledger Growth Base	Permission Set License		
Action Plans	Permission Set License		
Actionable Relationship Center	Permission Set License		
Advanced Program Management	Permission Set License		
Business Milestones and Life Events Access	Permission Set License		
Business Rules Engine Designer	Permission Set License		
Business Rules Engine Runtime	Permission Set License		
Business Rules Engine Runtime for Communities	Permission Set License		
Care Plans	Permission Set License		
Case Referral	Permission Set License		
Complaints Management Access	Permission Set License		
Compliant DataSharing	Permission Set License		
CSV Advanced Data Import	Permission Set License		
CSV Basic Data Import	Permission Set License		
Data Pipelines Base User	Permission Set License		
Decision Explainer Permission Set License	Permission Set License		
Decision Explainer Site Permission Set License	Permission Set License		
DocGen Designer	Permission Set License		
DocGen Runtime for Community Users	Permission Set License		
DocGen Runtime User	Permission Set License		
Document Checklist	Permission Set License		
Dynamic Assessments	Permission Set License		
Einstein Agent	Permission Set License		
Einstein Agent CWU	Permission Set License		
Einstein Search	Permission Set License		
Enablement Lite	Permission Set License		
Experience Cloud for Grantmaking	Permission Set License		
Fundraising Access	Permission Set License		
Fundraising for Experience Cloud	Permission Set License		

Grantmaking User	Permission Set License		Available with Grantmaking SKU
Group Membership	Permission Set License		
Industries Assessment	Permission Set License		
Industries Interaction Summary	Permission Set License		
Industries Sales Excellence	Permission Set License		
Industries Visit	Permission Set License		
Industry Service Excellence	Permission Set License		
Nonprofit Cloud Case Management	Permission Set License		
OmniStudio	Permission Set License		
OmniStudio Runtime for Communities	Permission Set License		
OmniStudio User	Permission Set License		
Outcome Management	Permission Set License		
Outcome Management for Experience Cloud	Permission Set License		
Program and Benefit Management	Permission Set License		
Program and Case Management for Experience Cloud Sites	Permission Set License		
Provider Management	Permission Set License		
Query for Datapipelines User	Permission Set License		
Record Aggregation	Permission Set License		
Tableau Einstein Included App	Permission Set License		
Tableau Einstein Starter	Permission Set License		
Program Management	App	Helps define, plan, deliver, and track programs and the benefits provided	
Fundraising Operations	App	Helps your team perform the essential tasks of fundraising	
Philanthropy And Partnerships	App	Provides tools and information to cultivate and solicit large gifts	
Fundraising Strategy	App	Provides a high-level understanding of your fundraising data and activities	
Donor Engagement	App	Helps mass-market fundraisers and campaign managers track and manage mass-market fundraising efforts	
Outcome Management	App	Set your outcome strategy, link it to your programs and services, and see all of the components of your outcome strategy in one place	
Grantmaking	App	Helps you manage the entire grantmaking process	