RaiseNow

Live Webinar | 14.03.2024 | 11:00-12:00

RaiseNow and Salesforce Nonprofit Cloud

Speaker:

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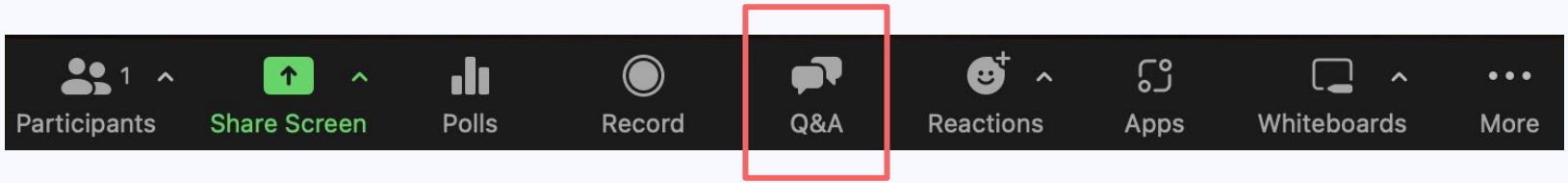
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Agenda

- Implementation & Data Model
- Demo
- Changes in the Onboarding Process & Configuration
- Customization options
- Operational Stability
- Scope
- Migration Path

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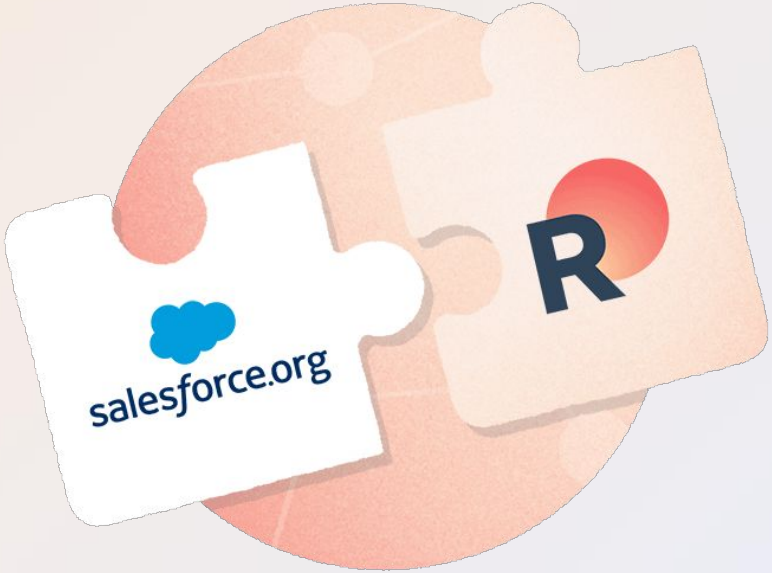

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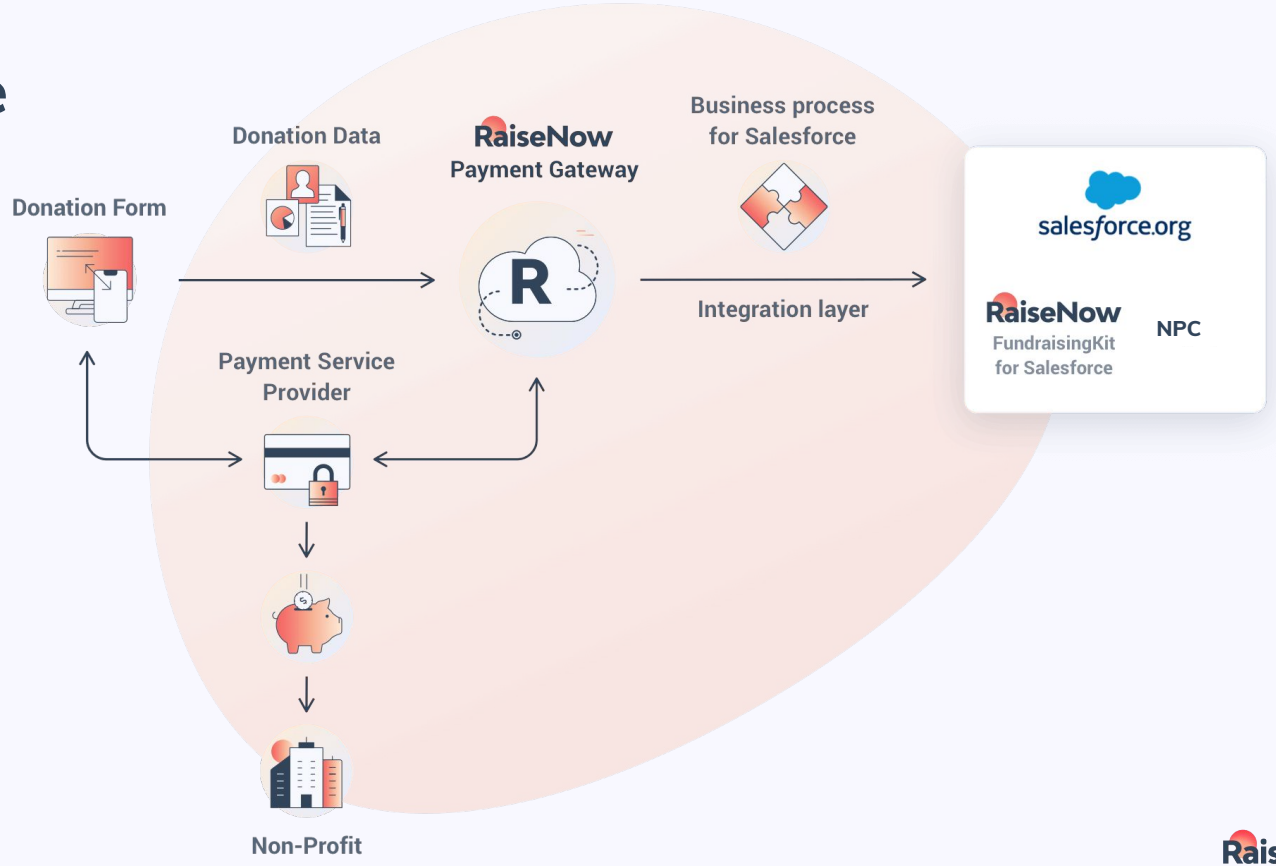
Implementation & Data Model

Architecture



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Implementation & Data Model

Data Model - Fundraising Basics

- (Person) Accounts
- One-Off Donations
  - (Person/Business) Account
  - Gift Transaction (example)
- Recurring Donations
  - (Person/Business) Account
  - Gift Commitment (example)
  - Payment Schedule
  - Gift Transaction

We recommend you study the ERD provided by Salesforce.

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Implementation & Data Model

Data Model - Sources and Designations

- Campaigns -> campaign_id
- Source Codes -> campaign_subid
- Designations -> Inherit from campaign, do not set directly via RaiseNow

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Implementation & Data Model

Fundraising Business Process API

- Abstraction layer provided by Salesforce as a composite API for consistent implementation of the NPC data model across vendors
- **RaiseNow usage:**
  - Creating & updating Gift Commitments
  - Creating & updating Gift Transactions
- **Advantages:**
  - Salesforce interpretation of the data model
  - Duplicate detection and handling out-of the box
  - Support for organisational donations out-of-the-box
  - Eliminates RaiseNow configurations

DEMO

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Changes in the Onboarding Process & Configuration

New Configuration Object

- Outreach-source-code-map
- Payment-instrument-map
- Campaign-map
- Outreach-source-code-map
- Default-update-logic
- .. and more in the future
- .. example

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Changes in the Onboarding Process & Configuration

New RaiseNow Permission Sets

- RaiseNow Admin
- RaiseNow Users

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Changes in the Onboarding Process & Configuration

Goodbye RaiseNow Manager - Hello RaiseNow Hub

- The RaiseNow Manager is being deprecated.
- RaiseNow is currently in the process of migrating customers to RaiseNow Hub
- The RaiseNow Manager will not be supported in the NPC implementation

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Customization Options & Configuration

RaiseNow Fields for

- Analytics
- Face-to-Face
- Peer-to-Peer
- Transaction Details
- Multi account customers
    - think national/regional chapters for the same charity
- Attachments

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Customization Options & Configuration

Attachments

- Attachments on Gift Transaction & Gift Commitments
- Recommended Usage: Key Value Pairs
- Customers and SIs are supported by RaiseNow public Apex methods and examples

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Customization Options & Configuration

Attachments - Examples

- *As a fundraiser, I want to add the Lead Source to all my accounts created through the donation process (transaction, flow)*
- *As a fundraiser, I want to add relationships when a Gift Transaction was received from a peer-to-peer campaign*
- *As a fundraiser, I want to track the performance of face-to-face marketers active on the street.*
- *As a fundraiser, I want to track the performance of particular marketing locations for my face-to-face campaigns.*

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Customization Options & Configuration

Reduce Direct References to Salesforce Objects from Touchpoints

- Face-to-Face - Fundraisers will no longer reference Salesforce objects directly.
- Peer-to-Peer - Will no longer reference Salesforce campaigns directly.
- Gift Commitments - It will be possible to reference a Gift Commitment directly
- Accounts - It will be possible to reference a Salesforce Account directly

MVP

Initial Release Scope

Onboarding and Online Payments

1

Process Online Payments

Create one-off and recurring donations through RaiseNow touchpoints. Process data through the Salesforce Fundraising Business Process API

2

Manage Commitments in Salesforce

Upgrade recurring payments, modify, pause, resume and cancel recurring payments.

3

Facilitate onboarding process

Move essential configurations into Salesforce and eleminiate touchpoint dependencies.

4

Facilitate process customization

Provide a standardized place for custom data points.

Scope

Future Releases

End-to-End Fundraising Solution

1

Direct Debit and Referenced Payments

Bank Payment Integration to process direct debit (LSV+, Debit Direct, SEPA) and referenced payments. Automatically match payments for Gift Commitments and Direct Marketing Campaigns.

2

Acquirer Settlement Reconciliation

Automatically match acquirer summary payouts to individual Gift Transactions and update records in Salesforce.

3

Advanced Touchpoints Support

Process Peer-to-Peer and Face-to-Face one-off and recurring donations.

4

Automated Payment Matching

Support matching strategies to automatically match payments without specific designation information.

Migration Path

Salesforce Guidance and SI Support

- Complex project that requires assistance from your SI
- Use the migration guide provided by Salesforce
- RaiseNow will extend the integration guide provided by Salesforce with fields relevant to RaiseNow.
- Items to flag:
    - Salesforce recommends an Org migration
    - Transition from Household model to Person Accounts

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Thank you for your attention!

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