

Resources & Webinar Highlights

How Fundraising and Finance Can Build Donor Trust in a (Post) Pandemic World



Missed [our webinar](#) on September 23, 2020? Here are the top takeaways and more!

Why talk about transparency in fundraising and Finance?

Accurate financial reports demonstrate compliance to the IRS and show donors that their dollars are making a difference. The trouble is, producing financial reports is not easy. When your fundraising and finance teams don't have a strategy for achieving reliable CRM-to-General Ledger communication, financial reporting could be error-prone.

[Accounting Subledger](#) is a product from Salesforce.org that prepares your fundraising information for your accounting system. It saves fundraising and finance significant budget and time on reconciliation tasks by connecting systems to ensure a single source of truth for revenue and payment data allowing for accurate financial reporting and much more.

Watch the full recording of the webinar [here](#).

Key Discussion Points

Why did the Jewish Federation of Greater Atlanta move to Salesforce?

Yisrael: We needed to view the people we interact with not just as donors, but as attendees, partners, volunteers and friends. We need more than a CRM, we need a customizable data platform to view our constituents with a 360 degree view. The decision was easy; No other people-focused data platform is as flexible, customizable, integratable and future-proof as Salesforce. Adding Accounting Subledger extended our functionality by bringing the finance and fundraising systems together

How should organizations approach implementation?

Megan: Thoughtfully! Assemble a cross-functional team and keep all phases of implementation in mind—discovery, configuration, and enablement. Our Services team can guide you through the process in 3 weeks with the [Accounting Subledger Jumpstart](#).

Is Accounting Subledger a paid product?

Mia: Yes, it is a paid product. Your account rep is the best person to go over pricing with you. Currently, you do need Nonprofit Success Pack (NPSP) to implement this product.



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Products and Features

These are the products and features we talked about during the webinar:

1. [Nonprofit Success Pack \(NPSP\)](#) is a series of managed packages, installed on Salesforce CRM. It turns the #1 CRM for businesses into a Constituent Relationship Management system for nonprofits.
2. [Accounting Subledger](#) is a paid product from Salesforce that prepares your fundraising information for your accounting system. This is not an accounting system but can work with your Salesforce CRM and pretty much any accounting system you currently have. See [product documentation](#) for more details
3. [Accounting Subledger Jumpstart](#) is a paid implementation package from Salesforce. Our experts will guide your team through discovery, complete your hands-on configuration, and enable your admins for long-term success with Accounting Subledger.

More Resources

Our Fundraising Solutions

[Demo Video: Fundraising & Marketing](#)

Webinar Highlights: [Segmentation and Stewardship of Donors](#)

[Trailhead: Fundraise with Nonprofit Cloud*](#)

Solution Sheet: [Why connect your Giving?](#)

Accounting Subledger

[Product Demo and Solution Sheet](#)

[Product Documentation](#)

[Join the Accounting Subledger POU Group](#)

[Blog: Transparency in Fundraising and Finance](#)

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