



# Nonprofit Cloud

Fund, deliver, and measure impact with one integrated platform.

## Explore the key features of Nonprofit Cloud

Powered by the #1 AI CRM, Nonprofit Cloud is bringing fundraising, programs, marketing engagement, and outcomes together in a single solution.

**1 AI-powered CRM**  
Nurture relationships and scale impact with AI-driven, personalized experiences.

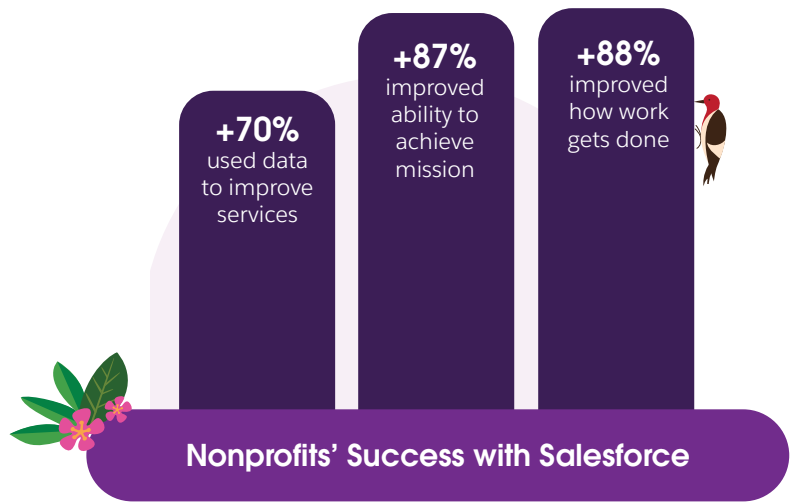
**2 Program Management**  
Plan and deliver programs in one place. Save time with streamlined tools for service delivery and participant engagement.

**3 Case Management**  
Keep clients on track towards their goals, delivering benefits efficiently and keeping track of where clients need support.

**4 Fundraising\***  
Cultivate authentic relationships, at scale. Enable data-driven fundraising so fundraisers are focusing on the highest value work.

**5 Marketing & Engagement\***  
Marketers can easily see what channels, campaigns, and messages are resonating the most.

**6 Outcomes\***  
Standardize the structure of outcomes, metrics, and targets so any team has real time outcome reporting.



Source: Salesforce.org Customer Impact Report 2021

\*Program and Case Management pre-built app are available now. Pre-built apps for Fundraising, Marketing & Engagement, and Outcomes is planned for upcoming releases. Nonprofit Cloud's data foundation and common capability model can be leveraged for the entire stakeholder lifecycle.





# Nonprofit Cloud Core Capabilities

We've designed Nonprofit Cloud with the flexibility needed to meet evolving stakeholder needs, fast. Built with a data foundation that allows you to easily scale as you grow, Nonprofit Cloud provides each department with a set of core capabilities to maximize impact across your entire organization.

| Capability                                       | Description   |
|--|---|
| <b>Accounting Subledger</b>                      | Reduce time spent on reconciliation by connecting systems and preparing your financial data for your accounting system.                                   |
| <b>Actionable Lists</b>                          | Keep program participants and staff on track by creating dynamic action lists to track progress in real time.   |
| <b>Alert Framework</b>                           | Ensure program participants never miss an update or deadline with triggered notifications and reminders.  |
| <b>Business Rules Engine</b>                     | Simplify the process of determining eligibility or qualification and automate complex decision-making to find solutions faster.                           |
| <b>Constituent Relationship Management (CRM)</b> | Capture and manage individual and household information easily.   |
| <b>Case Plans</b>                                | Save time and improve consistency by creating Case Plans from templates and personalizing to client's unique needs.                                       |
| <b>Case Management</b>                           | Keep clients on track towards their goals, delivering benefits efficiently and keeping track of where clients need support.                               |
| <b>Data Processing Engine</b>                    | Transform stakeholder and organizational data found across Salesforce into actionable records.  |
| <b>Document Checklist</b>                        | Reduce friction and streamline updates between stakeholders and staff using checklists and real-time document uploading.                                  |
| <b>Document Generation</b>                       | Easily generate ad-hoc documents using Salesforce and external data sources, right from the platform.   |
| <b>Identify Verification</b>                     | Standardize identity verification with a process that is flexible, provides an audit trail, and helps combat identity fraud.                              |
| <b>Interaction Summary</b>                       | Capture notes about the client and view the notes in chronological order to get up to speed on note history.  |
| <b>Interest Tags</b>                             | Capture client needs and interests with custom tags. Easily create reports and dashboards showing common themes to design personalized outreach at scale. |
| <b>Program Management</b>                        | Drive engagement by easily designing personalized, guided experiences of your institution.  |
| <b>OmniStudio</b>                                | Accelerate Salesforce configuration using drag & drop configuration.  |
| <b>Salesforce Scheduler</b>                      | Easy, streamlined appointment booking across staff members or programs.   |
| <b>Timeline View</b>                             | Allow stakeholders and staff to reference applications and past interactions to evaluate progress.  |

Fundraising, Marketing & Engagement, and Outcomes features will be added in subsequent releases.

Sign up for a free trial of Nonprofit Cloud at [bit.ly/ngocloudtrial](https://bit.ly/ngocloudtrial)

