Dayspring Partners

Salesforce Communities for Nonprofits

What you can do with your budget

What are Salesforce Communities?

A Salesforce Community is a CRM-integrated branded space that allows your nonprofit's constituents to connect with each other and share information with your Salesforce CRM. Constituents receive a login with a level of access to your CRM information that you control. Communities can be customized to fit the look and feel of your nonprofit's brand. Whatever information you or your constituents collect and enter into the community is captured in your Salesforce CRM. Your staff can then act on this information quickly and report on this data – all without the need to send several emails, move data back and forth, or leave Salesforce.

Here are some examples of how a nonprofit can make use of Salesforce Communities:

BOARD MEMBER COMMUNITY

If board members are helping to fundraise, it is useful to collaborate over the same Salesforce opportunity records, tasks and activities, and reports that CRM users look at. They're also given a more user-friendly interface.

ENROLLMENT OR SELF-SERVICE COMMUNITY

Clients can enroll in your program to receive a login to a Salesforce Community where they can update their information, upload files, and communicate with your staff. This information is stored directly in Salesforce.

CASE MANAGEMENT COMMUNITY

Partners, volunteers, or mentors can log into a Salesforce community and see clients or mentees they have been assigned, submit progress notes, and update information on those clients. mation, upload files, and communicate with your staff. This information is stored directly in Salesforce.

Based on budget, there are various levels of customizability and functionality nonprofits can achieve. A Salesforce Community project includes a one-time development and configuration cost plus ongoing licensing fees.

Salesforce Communities

Let us build your community for your:

Volunteers
Partners
Constituents
Board

If your budget is
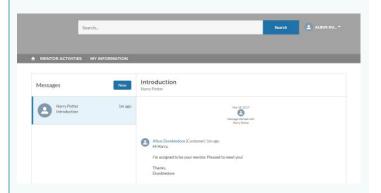# $15,000-$49,999*

Your community would be built off of one of the pre-existing Communities templates that Salesforce provides, which allows us to drag and drop different components onto your page. These components can include list views, reports and dashboards, record details, and more. At the lower end of this budget, we would mostly use standard community pages and Lightning components.

Towards the middle-to-higher end of this budget range, there is more room to create more custom community pages, apply more pixel-perfect branding, and integrate with third-party applications into the community. Additionally, some complex Flow components or custom Lightning components are possible within this budget. In either case, community members will have create, read, edit, and/or delete permissions that you define – again, just like any other normal CRM user has.
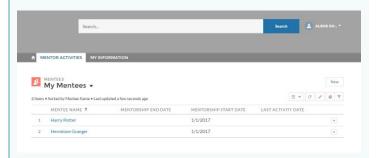
You might want these community members to update their own contact information, which they can do by editing their own contact record. They might be enrolled in a program with your organization, and can submit information they need to report to you annually by creating a record under a custom object. If you are working with partner organizations and need to share information, they can access your reports and dashboards and view CRM records you give them access to.
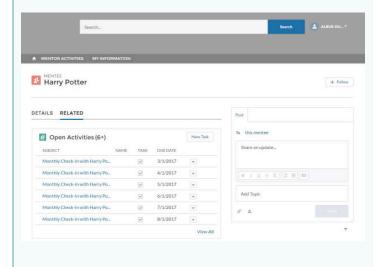
Example

Here we have a community set up to foster mentor-mentee relationships. The mentor is logged into the community and can send private Chatter messages to any of their mentees.

They can view the custom object, Mentees, which lists to whom they are assigned.

Clicking into the record, they can view information about upcoming tasks the mentor must take (in this case, have a standing monthly check-in) and other fields on the Mentee record you've made visible to this community member.

If your budget is
$50,000-$99,999*

An implementation budget of $50,000 - $100,000 affords a greater degree of customization and integration options. It allows nonprofits to move away from the standard community pages and towards highly customized Lightning community pages and components that can dynamically display CRM information in a more attractive and user-friendly manner. This price tier also allows for greater and more advanced integrations with third-party applications.

For example, a record detail page that your community users interact with can be given a facelift to be much more user-friendly (through the use of a Flow or custom Lightning component). Another example is the availability of a form building tool to create Salesforce-integrated forms for a community user to complete during an application process. The community user can access the form through the community, and as s/he moves through the application process, s/he would see different information and content based on the application status. This status would be set in the CRM by internal CRM users.need to report to you annually by creating a record under a custom object. If you are working with partner organizations and need to share information, they can access your reports and dashboards and view CRM records you give them access to.
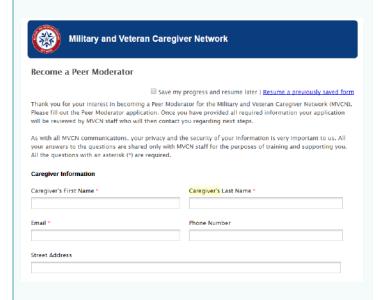
Example

Dayspring worked with the Military and Veteran Caregiver Network (MVCN) to craft their Salesforce solution. MVCN offers peer-based support and services to connect those providing care to service members and veterans. They needed a CRM to track these caregivers and a private online community to allow these caregivers to interact with each other, apply to participate in programs, and access private webinars.

Based on their needs, Dayspring implemented Salesforce Communities and designed it to match their look and feel.

We configured various third-party applications to connect with their Salesforce. FormAssembly was used to create an online application form that fed into the CRM, and upon MVCN approving the application, those applicants would then receive access into the community. We created two other forms for caregivers to apply to two additional MVCN programs once they were a part of the community.
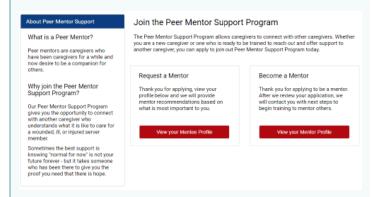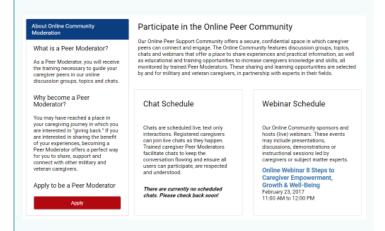
If your budget is
$50,000-$99,999*

continued

A custom API integration was configured with a mentor-mentee matching tool called PushBuild, which was also securely accessible through the community. As community users progressed through these applications, their community pages would reflect whether they applied already or not.

Additionally, we used Eventbrite and its Salesforce integration to host MVCN's private caregiver talks and events. Eventbrite events flow into Salesforce as campaigns, and then appear automatically in the community when an "on" switch is flipped on the Salesforce campaign record by CRM users.

If your budget is $100,000+*

A budget above the $100,000 range allows for the broadest range of customization. This could include custom Lightning pages and integrations with multiple third party apps, beyond what can be achieved in the lower tiers. In budgets of this size, the Salesforce Community serves as a platform to provision authenticated logins and CRM access to users based on permissions you specify. In terms of the community user experiences, the design and functionality is entirely unique to your nonprofit's needs – almost as if a custom web application had been created for you. In the previous two tiers, you start from out-of-the-box Salesforce and work mostly within its confines, but this tier lets your designer drive.

We wish you great success in your Salesforce implementation. Please let us know if Dayspring Partners can be of assistance to you as you proceed forward with your Salesforce Community. You can contact **Dale Gish** at **dgish@dayspringpartners.com** or **(415) 247-9421 ext. 131**, or fill out our contact form at https://www.dayspringpartners.com/contact/

Example

In a current project for a home care industry, Dayspring is creating a fully custom solution using the Salesforce Lightning Design System. In the current phase of development, we are creating a community of users that are either caregivers looking after dementia patients and who submit daily reports about their shift, or family members of these patients who want to view information about their loved one's care. Chatter is used to facilitate communication between office staff, caregivers, and family members.

Appropriate permissions and Salesforce Community licenses have been set so that caregivers only see the patients they are assigned to and family members only see their own loved ones. The design aligns closely with this company's brand and features a tile-based interface that is optimized for tablet viewing, the device most caregivers are using to report on their shifts.

The Salesforce Community is intelligent enough to surface the current client and shift the caregiver is staffed with. Furthermore, the fields displayed on these shift reports will also be intelligent enough to show only what is relevant for the shift type (day, evening, or overnight), and the particular needs and care schedule of the patient. The rules governing the display of these shifts is guided by information and permissions set in the CRM, and the information caregivers submit goes directly back into it. This allows office staff to act on information immediately and report on it as needed.

In future design phases, Dayspring expects to integrate human resources, scheduling, invoicing and payroll solutions with the Salesforce Community. The community will serve as an all-in-one hub for both caregivers and family members. Additionally, office staff will move from needing numerous systems to manage HR, scheduling, invoicing, sales, and marketing to one system, built on the Salesforce platform.