Salesforce Agentforce Nonprofit Integration

Build stronger donor relationships and save valuable time

The opportunity

Having complete and well-structured data in your CRM is the foundation to future success, as it enables you to make reliable data-driven decisions.

The **RaiseNow Salesforce Agentforce Nonprofit Integration** (AFNP, formerly Nonprofit Cloud) helps you prioritise, saves you time and enables you to wow your donors with a highly personalised, seamless donor experience which forms the basis for lasting relationships.

We offer a native integration with Salesforce Agentforce Nonprofit whereby all key processes can be controlled directly from your CRM. With Smart Matching, you can ensure that every donation is correctly allocated, even without structured references. No payment slips through the cracks – and your data stays clean, accurate and ready for action.

Use cases

- A donor gives online and the donation is automatically displayed in Salesforce
- Payments are automatically assigned to the correct campaign – even when reference information is unclear or missing, thanks to Smart Matching.
- Payments are assigned to the configured outreach source code
- Data points from community and tablet fundraising are directly integrated
- Automated RaiseNow dunning processes for your recurring gift commitments
- RaiseNow generated tax receipts are immediately available in Salesforce.

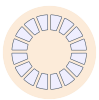
Benefits for you and your organisation

All donation data assigned to the relevant contact

Gain a 360° view of your contacts and transactions. You have all the data on who donated what, and when, and can use it to tailor your communication. Build strong relationships and keep your donors engaged thanks to highly-tailored campaigns targeting filtered segments.

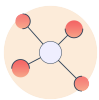
All fundraising channels, perfectly in sync

Leverage a wide variety of RaiseNow products with everything from Peer-to-Peer to Tablet Fundraising, Donation Forms and custom APIs, and access the data from each of your fundraising channels in Salesforce, where it is seamlessly assigned to each contact.



Smart Matching: Every payment assigned

RaiseNow's Smart Matching engine for Salesforce Agentforce Nonprofit sets a new standard in payment reconciliation. It intelligently automates even complex cases and ensures that no payment is ever lost – even when references are missing or incomplete.



Automate routine tasks

Let Salesforce do the heavy lifting for you. You can automate: payment reconciliation (saving your accounting team time), assigning payments to the correct campaign based on the donation purpose selected, or sending personalised thank you notes and donation receipts (e.g. via Salesforce Flow).

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Automated bank & payment reconciliation

Payouts from payment service providers are automatically reconciled with incoming payments on your bank account, saving your team a significant amount of time.

Manage recurring donations in Salesforce

Simplify your day-to-day activities by managing recurring donations directly in Salesforce. You can easily adjust the donation amount, cancel recurring donations or refund payments.

Automated system monitoring

Payments always arrive reliably thanks to an independent and highly responsive infrastructure with 24/7 monitoring. It also provides automated problem resolution in the event of misconfigurations and system outages, as well as error notification and support.

Simple setup

The RaiseNow Salesforce Integration is quick to get up and running and you don't need any programming knowledge to get it set up. The integration meets Salesforce's strict standards and can be installed via the official Salesforce AppExchange app store.

Tech that's always up to date

Ongoing improvements and any further development – covering everything from the touchpoints to the interface to the functions available in the CRM – are completely free of charge for you and are automatically reflected in your software. We guarantee functionality, further development and the highest data protection standards.

Campaign allocation according to donation purpose

When your supporters select a donation purpose in the donation form, the corresponding outreach source code and campaign are automatically assigned to the resulting gift transaction.

These ambitious fundraisers use our RaiseNow Salesforce Integration

UNHCR The UN Refugee Agency · AMNESTY INTERNATIONAL · PRO JUVENTUTE

If you have any questions, we're always here to help. Get in touch at sales@raisenow.com.

> *RaiseNow really helped us to make our online fundraising processes more efficient and to synchronise the data flow with Salesforce.*

Marta Vidal
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