Salesforce.org Einstein for Nonprofits

@salesforcedocs

Last updated: August 21, 2022

Contents

Einstein for Nonprofits

Einstein for Nonprofits Introduction

Overview of Einstein for Nonprofits

Use Einstein for Nonprofits to obtain predictive insights for your constituents.

Einstein for Nonprofits generates predictive insights and metrics by modeling real world data in your org. The app uses artificial intelligence (AI) to train the system about possible constituent behaviour based on past giving and similarities with other donors. The insights that are gleaned can help you make more informed decisions when planning campaigns and setting up marketing targets.

Use predictive insights to better understand your donor base by:

- Leveraging Einstein for Nonprofits to help admins generate predictive insights by using the Einstein Prediction Builder (EPB) bundled package. Obtain percent probability scores for the likelihood of each constituent to be a first-time donor, recurring donor, or top donor.
- Using Backup Models to obtain useful predictive insights if your org doesn’t have enough data for predictions using EPB.
- Configuring Contact cards to display predictive metrics and scores as part of the donor's profile. These predictions can then be actioned by users within your nonprofit.

Einstein for Nonprofits not only produces high-quality, cost-effective custom predictions that can be refreshed daily, but also eliminates the need for expensive consulting contracts where the analytics soon become stale. Leverage Einstein for Nonprofits to reach your fundraising targets sooner!

Success for Your Nonprofit

Learn how one nonprofit uses Einstein for Nonprofits to identify first-time or high-potential donors.

To learn more about using Einstein for Nonprofits, we’d like to introduce you to Max Bristol, a fictitious admin at SF Scholars. SF Scholars is an imaginary nonprofit that promotes social and economic equity through educational enrichment and college readiness programs. While both Max and SF Scholars are fictional, we think you’ll relate to their challenges.

Max manages a large database with many constituents and plans campaigns and marketing events. He wants to increase the amount of donations for students at the nonprofit, but finds it challenging to identify constituents who are ready to donate, or make large donations. Max sometimes feels overwhelmed with the task of planning effective campaigns.

Max has heard about nonprofits using AI, including Einstein apps from Salesforce, to identify their most promising donors. But he doesn't know how to code or train a predictive analytics model to look for patterns in his organisation's data. And there's no room in the SF Scholars budget to pay for that expertise. No problem! Einstein for Nonprofits has custom AI for admins like Max. He can choose to:

- Reach out to constituents who expressed their passion for this cause by converting them to first-time donors.
- Review insights at a glance to understand which supporters have repeatedly donated to the nonprofit and are committed to equity through education.
- Opt to plan his next campaign around constituents who have given the most.

By using Einstein for Nonprofits, Max now leverages predictive insights to ensure that campaigns and marketing dollars achieve fundraising targets. He just points. Clicks. And predicts!

Einstein for Nonprofits Architecture

Einstein for Nonprofits Architecture

Learn about Einstein for Nonprofits architecture.

Einstein for Nonprofits helps you to obtain actionable insights using the Contact, Opportunity, and Recurring Donation objects. The Nonprofit Success Pack (NPSP) app is a prerequisite for Einstein for Nonprofits. Einstein for Nonprofits analyses records in the NPSP Contacts object, and uses custom fields to map and store generated metrics. Then the donor score is loaded back in NPSP. Einstein for Nonprofits interacts with and modifies objects and fields in NPSP version 3.210 or later.

Einstein for Nonprofits aims to ensure the benefits of AI are accessible and inclusive for employees working at nonprofits, including admins and those involved in donor outreach or business development. The product satisfies rigorous privacy and compliance standards. Einstein for Nonprofits harnesses the power of machine learning to make predictions about future donor behaviour. Einstein for Nonprofits is:

- Responsible for safeguarding and protecting NPSP data on which predictions are based.

- Accountable to users by providing admins with the “Don’t Profile” option for consent management.
- Transparent by striving for model explainability and clear usage terms.
- Empowering nonprofits by promoting growth, and benefiting society as a whole.
- Inclusive and respectful of the values of our users by testing models with diverse data sets.

To start a workflow, a Salesforce admin invokes Insights Prediction in Einstein for Nonprofits. Configuration options allow various parameters to be set, including:

- Generating predictive insights for individual donor behaviour and contribution patterns.
- Deploying Backup Models to generate predictive metrics while the org is bolstering its dataset to reach the minimum number of records required by Einstein Prediction Builder (EPB).
- Setting up notifications by Einstein by Nonprofits when your org reaches the required data volume to successfully obtain EPB output. You can also opt to switch back to using metrics generated by Einstein Predictions Builder.
- Displaying predictive metrics data on Contact cards.

The Einstein for Nonprofits AI model is trained periodically. Internal calculations are used to produce metrics that are dependent on the data in your org and subsequently produce custom metrics for your constituents. For more information, see Predictive Insights using Backup Models.

Predictive Insight Input Fields

Learn more about data that is parsed to generate predictive insights.

Einstein for Nonprofits parses and analyses data from Nonprofit Success Pack (NPSP). Depending on jobs that are initiated by admins, bulk data is analysed by using Einstein Prediction Builder or Backup Models to generate predictions about constituents.

Insights and scores from Einstein Prediction Builder or Backup Models can be used to segment or target specific constituents to further refine the prediction output.

First-Time Donor

Predictive insights about constituents becoming first-time donors provides fundraising employees with an understanding about which supporters, with no previous donations, can be converted to donors. However, there are no guarantees about who becomes a first-time donor. The tool predicts future donors based on on past giving and similarities with other donors.

This table shows Einstein Prediction Builder input fields.

Standard Contact Fields	Nonprofit Success Pack Contact Fields
Birthdate	npe01__PreferredPhone__c
Email	npe01__Preferred_Email__c
Title	npe01__Work_Address__c
Description	npe01__Primary_Address_Type__c
	npe01__Other_Address__c
	npe01__Secondary_Address_Type__c

This table shows Backup Models input fields:

Standard Contact Fields	Nonprofit Success Pack Contact Fields
Birthdate	npe01__Primary_Address_Type__c
HomePhone	npsp__Current_Address__c
MailingCity	
MailingCountry	
MailingPostalCode	
MailingState	
MobilePhone	
Phone	

Recurring Donor

Predictive insights about constituents becoming recurring donors provide nonprofit fundraising staff with an understanding about supporters who can be converted to repeat donors. However, there are no guarantees as to who becomes a recurring donor or about the ability to predict future revenue from recurring donations.

This table shows Einstein Prediction Builder input fields.

Standard Contact Fields	Nonprofit Success Pack Contact Fields
Title	npe01__AlternateEmail__c
Birthdate	npo02__AverageAmount__c
	npo02__Best_Gift_Year_Total__c
	npo02__FirstCloseDate__c
	npe01__Home_Address__c
	npsp__Largest_Soft_Credit_Amount__c
	npsp__Number_of_Soft_Credits__c

Standard Contact Fields	Nonprofit Success Pack Contact Fields
	npsp__Number_of_Soft_Credits_Last_N_Days__c
	npsp__Number_of_Soft_Credits_Last_Year__c
	npsp__Number_of_Soft_Credits_This_Year__c
	npe01__Other_Address__c
	npe01__Preferred_Email__c
	npe01__PreferredPhone__c
	npe01__Primary_Address_Type__c
	npo02__SmallestAmount__c
	npo02__Soft_Credit_Last_Year__c
	npo02__Soft_Credit_This_Year__c
	npo02__Soft_Credit_Total__c
	npo02__Soft_Credit_Two_Years_Ago__c
	npe01__Work_Address__c

This table shows Backup Models input fields:

Standard Contact Fields	Nonprofit Success Pack Contact Fields
MailingPostalCode	npe01__WorkEmail__c
MailingState	npe01__HomeEmail__c
MailingCity	npe01__AlternateEmail__c
Email	npe01__WorkPhone__c
Phone	npsp__Do_Not_Contact__c
HomePhone	
MobilePhone	
IsEmailBounced	

Top Donor

Top donors are constituents whose donation amounts fall within the top 25% of all contributions over the last 36 months. Predictive insights about constituents becoming top donors provides nonprofit fundraising staff with an understanding about constituents who donate enough to move them past the top-donor threshold. However, there are no guarantees as to who donates in the future or about future revenue amounts from donors.

This table shows Einstein Prediction Builder input fields:

Nonprofit Success Pack Contact Fields	
npo02__OppsClosedLastNDays__c	
npo02__OppsClosedLastYear__c	
npo02__OppsClosedThisYear__c	
npo02__OppsClosed2YearsAgo__c	
npe01__Primary_Address_Type__c	
npo02__SmallestAmount__c	
npo02__NumberOfClosedOpps__c	

This table shows Backup Models input fields:

NPSP Contact Fields	
npo02__OppsClosedLastNDays__c	
npo02__OppsClosedLastYear__c	
npo02__OppsClosedThisYear__c	
npo02__OppsClosed2YearsAgo__c	
npe01__Primary_Address_Type__c	
npo02__SmallestAmount__c	
npo02__NumberOfClosedOpps__c	

Einstein for Nonprofits Installation

Before You Install Einstein for Nonprofits

Learn about product prerequisites and other helpful information prior to installing Einstein for Nonprofits.

Prerequisites

Before you install Einstein for Nonprofits, make sure you have:

- Salesforce Enterprise or Unlimited Edition, with a Sales Cloud or Sales and Service Cloud licence
- The latest version of Nonprofit Success Pack (NPSP) installed.
- The Nonprofit Cloud product with a current start date.
- Einstein Prediction Builder (EFN) Basic Edition licence.

Reach out to your Account Executive if you do not have these licences. You can also access your accounts to easily manage your subscriptions directly in Salesforce.

Next complete these prerequisites:

1. My Domain enabled and deployed for your org.
2. Salesforce Data Privacy and Protection enabled. This setting is enabled by default for your org.
3. NPSP Enhanced Recurring Donations installed and configured, in case you have an existing org without this feature.
4. Einstein Prediction Builder enabled for your org.

What's Installed

When you install the Einstein for Nonprofits managed package, you get:

- The Einstein Prediction Builder managed package to help generate custom metrics for your org.
- Backup Models that provide metrics while your data grows to meet the data threshold to generate predictive insights.
- The option to display Predictive Insights directly on Contact cards for constituents.

The Einstein for Nonprofits app has these tabs:

- **Get Started**: Get quick access to set up Einstein for Nonprofits and generate predictive insights using Einstein Prediction Builder.
- **Backup Models**: Enable and schedule Backup Models to obtain the percent probability of predictive insights for future donations.

Install Einstein for Nonprofits

Learn how to install Einstein for Nonprofits.

Installation

After you meet the prerequisites, install the Einstein for Nonprofits managed package. If the start date of this managed package is in the future, then you can install it but won't be able to use it until the licence activation date. When your licence expires, you will receive an error message.

Salesforce recommends installing in a Sandbox environment before installing into a Production org. For more information, see Create a Sandbox in Salesforce Help

1. Log out of all other Salesforce orgs. Salesforce recommends using an incognito window to ensure that you install in the correct org.
2. Go to the Einstein for Nonprofits installer.
3. Click **Install Einstein for Nonprofits - View Details**.
4. Click **Log In to Start Pre-Install Validation**, and then select your org type. Salesforce recommends a Sandbox org for your initial installation.
5. Log in to the org.
6. Click **Allow**.
7. Click **Install**.

A confirmation appears when the installation is completed.

Einstein for Nonprofits Configuration

Configure Einstein for Nonprofits

Configure model training and page layout to use Einstein for Nonprofits.

Enable Model Training

Begin here to train your model:

1. Click **Setup** and search for APEX jobs.
   - TGT_RecurringDonor_BATCH
   - TGT_RecurringDonorFinish_BATCH
   - TGT_TopDonor_BATCH
   - TGT_TopDonorFinish_BATCH
2. Check the jobs to make sure they are in **Completed** status prior to configuring Backup Models or Einstein Prediction Builder.

These jobs are queued and might take some time to complete depending on other processes that are running in your org at that time.

Add Lightning Web Components to Contact Page Layout

Add the Giving History and Predictive Metrics tiles to the Contact card page layout by using Lightning Web Components (LWC).

To add LWCs to a Contact page:

1. Click **Setup** gear icon from a Contact card, and then click **Edit Page**. The Lightning App Builder opens.
2. Scroll down to **Custom-Managed** under **Components** in the left navigation bar.
3. Drag either the **Giving History** or **Predictive Metrics** custom LWCs to the appropriate part of the Contact page, preferably the column on the right.
4. Click **Save**.
5. Click **Activate** on the **Page Saved** modal.
6. On the **Activation: Contact Record** page, select **Assign as Org Default**.
7. Select a form factor for your org default page.
8. Click **Save**.

Set Up Backup Models

Activate and configure Einstein for Nonprofits to generate and display predictive insights by using Backup Models.

Backup Models should be enabled at the same time that you invoke Einstein Prediction Builder (EPB) from the Einstein for Nonprofits app. You can also activate or deactivate Backup Models later. The Backup Model job is a batchable Apex. However, Salesforce recommends that you enable Backup Models during initial activation.

If Backup Models are enabled at the same time as EPB, the results from EPB appear on the Contact cards. If EPB is unable to model the dataset and generate predictions due to insufficient data volumes in the org or an application error, then the results from Backup Models are shown instead. If Backup Models aren't enabled during initial activation, then a failure by EPB to generate scores results in a lack of data for Contact cards.

> **Note**
> If a score is generated and then predictions are disabled, the prediction still persists on the Contact card. The likelihood of the insights being stale is high.

Activate Backup Models for the First Time

To activate Backup Models for the first time:

1. From App Launcher, open the **Einstein for Nonprofits** app.
2. Click the **Get Started** tab.
3. Click the **Einstein Platform** or **Backup Model** tile.
4. Select **Default Backup Model Schedule**.

The Backup Model job is controlled by the APEX scheduler and runs on the default schedule.

Subsequent Configuration of Backup Models

You can activate or deactivate one or more Backup Models. Deactivating all Backup Models prevents the scheduled Backup Model job from running.

To activate or deactivate Backup Models after the first time:

1. Launch the **Einstein for Nonprofits** app from the App Launcher.
2. Click the **Get Started** tab.
3. Click the **Backup Model** tile.
4. To activate or deactivate the generation of predictions, on the Backup Models Status page, click **Edit**, and then select or deselect the checkboxes.
5. Click **Save**.

You can modify the default schedule for Backup Models from **Setup**.

Display Backup Model Predictions

Backup Models provide you with predictive metrics while the data in your org grows to meet thresholds that allow EPB to successfully generate its own metrics.

You can view predictive insight percent probability scores on each constituent's Contact card. Modify the page layout for the Contact object to display these scores by using Custom Lightning Web Components.

Set up Predictive Insights using EPB

Configure Einstein for Nonprofits to generate and display predictive insights using Einstein Prediction Builder (EPB).

Configure Predictive Insights

Ensure that user-level and object-level permissions are configured for Einstein Prediction Builder (EPB).

Predictive scores are generated for your data in three stages: labeling, training, and scoring.

Labeling

Labeling starts automatically as soon as Einstein for Nonprofits installs. The **Train Models?** window pops-up after labeling is complete.

1. Navigate to the Einstein for Nonprofits app.

2. Click **Get Started** from the landing page.
3. Click the **Train Models** button on the **Train Models?** window.
   - The **Train Models?** window might not be visible immediately. You can see it after Einstein for Nonprofits has completed preparing your data for model training.
   - You must click the **Train Models** button to train the models for your org. Otherwise you will be prompted to do so repeatedly and won't be able to generate predictions.
   - This action schedules a new Apex job which needs to be completed prior to the models displaying on EPB. The jobs are queued and might take some time to complete depending on which other processes are running in your org at that time.

Training

Training adds information to the models at the org level to help predict one-time donors, recurring donors and top donors.

1. Click the Einstein Platform tile to check if the models in EPB are in Pending state.
2. Wait for the models to transition to the Ready for Review state.
   - If the models failed because there is insufficient data with less than 400 rows, then use Backup Models to generate predictive insights instead.
   - The models continue to display a Model Failed status until the batch jobs are successfully run again, even if additional data is added. By default these jobs remain in a failed state for 1 month.

Scoring

Scoring adds percentile probability scores to each individual Contact record.

1. Select Enable from the drop-down menu for each model in EPB to turn on scoring. It might take up to 24 hours for scores to be displayed on individual Contact cards. You can't generate predictions until models are trained.
2. Learn about the required edition and permissions and considerations for setting up EPB to add intelligence to your apps.

You can edit EPB predictions after they are live. However, editing a prediction isn't recommended because the edits are overwritten at the time of the next release.

Display Predictive Insights

Einstein for Nonprofits generates predictions about the likelihood to become a first time donor and the likelihood to become a recurring donor for all constituents. However, we only generate predictions about the likelihood to become a top donor for those constituents who have donated in the last three years.

You can view predictive insights on the EPB dashboard or on the constituent's Contact cards:

- View the results on the Einstein Prediction Builder scorecard after your prediction finishes building.
- View predictive insight percent probability scores on each constituent's Contact card. Modify the page layout for the Contact object to show these scores by using Custom Lightning Web Components.

> **Note**
> If a score is generated and then predictions are disabled, the prediction still persists on the Contact card. The likelihood of the insights being stale is high.

Latest Einstein for Nonprofits and Salesforce Releases

Install the latest releases installed to get the most out of Einstein for Nonprofits.

Staying up-to-date on product releases involves anticipating when your orgs get updated, staying informed about what's included in each release, and forming a strategy for testing and implementing the new features.

For detailed information on how to keep up with releases, see:

- Keep Up With Salesforce.org Releases
- Keep Up With Salesforce.com Releases

Einstein for Nonprofits and Translation

Frequently Asked Questions

How often do you localise Salesforce.org products?
We localise our product labels and text as part of every major seasonal release.

What languages do you localise into?
Salesforce.org localises by package, not by product, so the languages vary. See Available Languages. Salesforce offers three levels of language support: fully supported languages, end-user languages, and platform-only languages. For more information, see Supported Languages in Salesforce Help.

Do you localise product documentation?
We currently localise documentation for these products: Accounting Subledger, Case Management, Education Data Architecture (EDA), Grants Management, Insights Platform Data Integrity, Marketing Cloud for Nonprofits, Nonprofit Success Pack

(NPSP), Outbound Funds Module, Program Management Module (PMM), and Student Success Hub (SSH).

I noticed a mistake or something missing from a translation. Where do I report it?

Keep in mind that we update translations only for major releases, so they can be out of sync after minor releases. To report a mistake, create a case with the Topic set to `Setup and Security`, and the Category set to `Globalisation and Localisation`.

Can I override translations?

Absolutely. You can use the Translation Workbench to override translations. To learn more, see Translation Workbench in Salesforce Help.

What's the difference between language and locale?

In Salesforce, you'll see both Language and Locale settings. Locale determines the display formats for date and time, addresses, phone numbers, and commas and periods in numbers. Language determines the language that objects, fields, settings, and user interface text appear in.

Do you accept translations from the community?

Even though many of our products are open source, we don't currently accept GitHub pull requests for localisation contributions. The localisation process requires a level of maintenance that's not realistic or sustainable for community contributors, and we therefore rely on our own localisation programs to deliver high-quality, timely translations.

Available Languages

Salesforce.org provides translations into these languages. When you choose one of the supported languages during user (or org-wide) setup, objects, fields, settings, and user interface text appear in that language.

Einstein for Nonprofits

Language	UI	Documentation
Dutch	√	√
English (UK)	√	√
French	√	√
German	√	√

Note

If we don't support your preferred language, you can localise your org to enable that language for your global users. One option is to use the Translation Workbench to translate your text customisations and override labels and translations from managed packages. You can translate everything from custom picklist values to custom fields. For more information, see Add Translated Languages and Translators and Translate Custom Labels.

Localised Documentation

Einstein for Nonprofits

- Dutch
- English (UK)
- French
- German

Enable Languages

We recommend that you complete these steps to enable a language for use in :

1. Before using any translated languages, enable Translation Workbench in Setup. For information, see Enable and Disable the Translation Workbench.
2. If you're enabling a platform-only language:
    1. From Setup, search for and then select **Enable platform-only languages**.
    2. Move the desired language to the Displayed Languages list.
    3. Save your changes.

Einstein for Nonprofits Predictive Insights With EPB

Predictive Insights using Einstein Prediction Builder

Learn how Einstein for Nonprofits uses EPB to generate predictive insights for your org.

Einstein for Nonprofits helps admins generate predictive insights by using the Einstein Prediction Builder (EPB) bundled package. You can obtain predictions for the likelihood of each constituent becoming a first-time donor, recurring donor, or top donor by using built-in AI tools. EPB models are single-customer models. These models are trained using data from only one customer org.

EPB models data for all constituents, except Contacts that are set to **Don't Profile**. The **Don't Profile** field is located on the Individual record that the Contact is associated with and it ensures that the user's data is not used for future modeling.

Einstein for Nonprofits analyses uses EPB to compute scores for these three predictions:

- **Likelihood to become a first time donor**: Provides fundraisers with insight about supporters who have no previous donations, but can possibly be converted to donors.
- **Likelihood to become a recurring donor**: Provides fundraisers with insight about supporters who can probably be converted to repeat donors. If a contact has a recurring donation record with Status "Active" and Recurring Type "Open", then that contact is a recurring donor.
- **Likelihood to become a top donor**: Provides fundraisers with insight about constituents who have donated enough over the past three years to move them past the top donor threshold. The top donor threshold is calculated as follows:
  1. Consider all contacts who donated two years ago. Among these, find the giving threshold for the top 25% of donors from two years ago and refer to this group as the "two years ago threshold".
  2. Consider all of the contacts who donated last year. Among these, find the giving threshold for the top 25% of donors from last year and refer to this group as the "last year threshold".
  3. If any of these are true for each contact, then that contact is considered a top donor:
     - A contact's giving for the last two years is greater than the two year threshold.
     - A contact's giving this year is greater than the last year's threshold.
     - A contact's giving last year is greater than the last year's threshold.

These predictive metrics enable you to make smart decisions by quickly evaluating a prospect’s donation history or trends. Audiences can be tailored for a particular campaign by using the latest constituent data.

EPB trains multiple single-customer models with different configurations, and uses the configuration with the best model performance metrics. Your org’s models are trained by an automated process, not by a person. The set of fields that are used as model inputs are different for each predictive field. This set of input fields was selected by Salesforce.org after careful study of opt-in customer research and ethical data considerations. The automated process determines which of the set of model input fields to use in your org’s model, and what relative influence each field has on the model’s output.

EPB has data requirements for the org before it can generate predictions. EFP requires a minimum of 400 Contact records. Of these records, at least 100 must be for a first-time donor, recurring donor, or top donor, and at least 100 records must not be associated with any of these categories.

EPB jobs display a **Model Failed** status if they are unable to model the data set and generate scores due to insufficient data volumes or an application error. If EPB fails to generate a prediction, then the results from Backup Models appear on Contact cards instead. Ensure that Backup Models are enabled for your org. Otherwise your Contact cards might not show predictive insights.

EPB models are updated each month. The system retrains each predictive field to consider changes in the org data. Retraining the models ensures that you always have access to the most accurate insights. These changes in the org can result in a new way to generate individual scores at the Contact level, which are automatically reflected in custom predictive insights.

You will need to set up EPB to generate predictions and display insights.

Understand EPB Predictive Insights Results

Learn about EPB results for your org.

After your predictions are generated, review the predictive insights in the Einstein Prediction Builder Scorecard. Check out big-picture metrics, such as prediction quality and top predictors. Drill in on details, such as impact, correlation, and weight of each predictor.

Predictive insights are displayed on Contact cards for individual constituents. Based on user configuration and consent management settings, the following output can be displayed on Contact cards:

- No results are displayed if the predictive metrics fields are not populated.
- If the `Don't Profile` field is checked, then a yellow warning icon and a **Don't Profile** badge are displayed on the Predictive Metrics header when predictive metrics are loaded. The `Don't Profile` field is located on the individual record that the Contact is associated with.

To learn more about your scorecard metrics and prediction quality, see Einstein Prediction Builder: Understanding Your Scorecard Metrics and Prediction Quality.

Einstein for Nonprofits Predictive Insights With Backup Moodels

Predictive Insights using Backup Models

Learn how Einstein for Nonprofits uses Backup Models to generate predictive insights for your org.

Backup Models provide metrics on the likelihood of constituents becoming first-time, recurring, or top donors. Backup Models provide predictive metrics even when your org doesn't meet data thresholds for Einstein Prediction Builder (EPB) to generate your metrics. EPB needs a minimum threshold of records to be able to generate predictions. Einstein for by Nonprofits informs you via the notification bell when your org meets this threshold.

Backup Models use a set of calculations specific to your org to generate scores. If Backup Models are enabled at the same time as EPB, then the generated EPB results appear on the Contact cards. You should set up Backup Models at the same time as EPB.

Backup Models produce percent probability scores similar to those generated by EPB. However, for higher accuracy and org-specific customised output, Salesforce recommends that you use data from your org to obtain EPB predictive insights.

The status of an EPB job shows **Model Failed** when EPB fails to generate a prediction. If EPB is unable to model the data set and generate scores due to insufficient data volumes or an application error, then the results from Backup Models appear on the Contact cards instead. Ensure that Backup Models are enabled for your org. Failure to activate Backup Models may result in a lack of predictive insights for your Contact cards.

Backup Models include constituents data, except Contacts that are set to **Don't Profile**. The **Don't Profile** field is located on the Individual record that the Contact is associated with and it ensures that the user's data is not used for future modeling.

Similar to EPB, Backup Models also analyse data to compute scores for three predictions:

- **Likelihood to become a first time donor**: Provides fundraisers with insight about supporters who have no previous donations, but can possibly be converted to donors.
- **Likelihood to become a recurring donor**: Provides fundraisers with insight about supporters who can probably be converted to repeat donors. If a contact has a recurring donation record with Status "Active" and Recurring Type "Open", then that contact is a recurring donor.

- **Likelihood to become a top donor**: Provides fundraisers with insight about constituents who have donated enough over the past three years to move them past the top donor threshold. The top donor threshold is calculated as follows:
  1. Consider all contacts who donated two years ago. Among these, find the giving threshold for the top 25% of donors from two years ago and refer to this group as the "two years ago threshold".
  2. Consider all of the contacts who donated last year. Among these, find the giving threshold for the top 25% of donors from last year and refer to this group as the "last year threshold".
  3. For each contact, if any of these are true, that contact is considered a top donor:
     - A contact's giving for the last two years is greater than the two year threshold.
     - A contact's giving this year is greater than the last year's threshold.
     - A contact's giving last year is greater than the last year's threshold.

You can enable or disable any of these models. By displaying Backup Models predictive insights on Contact cards, these metrics are visible to users within the nonprofit.

The set of input fields used by Backup Models has been selected by Salesforce.org after careful study of opt-in customer research and ethical data considerations. The set of fields that are used as model inputs is different for each predictive field. The automated process determines which of the set of model input fields to use in your org's model, and what relative influence each field has on the model's output. Each model is an arithmetic and logical formula. It is impossible to extract any aspect of user data from the Backup Model.

You will need to set up Backup Models to generate predictions and display insights.

Understand Backup Models Results

Learn about Backup Model results for your org.

Backup Models and Einstein Prediction Builder (EPB) both generate predictive insights based on data in your org. The main difference between the two is that EPB needs a minimum threshold of records to be able to generate predictions. However, the predictive insights from either job can be used to understand the likelihood of constituents becoming a first-time, recurring, or top donors.

The output of Backup Models jobs can be interpreted in the same way as EPB predictive insights results. Predictive insights are displayed on Contact cards for individual constituents. Based on user configuration and consent management settings, the following output can be displayed on Contact cards:

- No results are displayed if the predictive metrics fields are not populated.

- If the `Don't Profile` field is checked, then a yellow warning icon and a **Don't Profile** badge are displayed on the Predictive Metrics header when predictive metrics are loaded. The `Don't Profile` field is located on the individual record that the Contact is associated with.

GDPR for Einstein for Nonprofits

Einstein for Nonprofits Product Info for GDPR

Einstein for Nonprofits Product Information for GDPR

The European Union (E.U.) General Data Protection Regulation (GDPR) was passed in 2016 with the intent of harmonising European data protection laws into a single set of rules, while setting a new global gold standard for data protection and privacy. In effect on May 25, 2018, the GDPR is one of the most comprehensive and strictest regulations of its kind in the world.

At its core, the GDPR boils down to three key pillars:

- **Security**: Keep data safe and secure, and prevent unauthorised access or processing.
- **Accountability**: Require companies to be accountable and transparent in how they collect, process, and protect personal data.
- **Individual Rights**: Put control back into the hands of the individual to determine how their data is collected and used, such that companies are expected to process personal data on the individual's terms.

If you process personal data related to your organisation's establishment within the European Union (E.U.), from or about persons within the E.U. or outside of the E.U. but where E.U. law applies, you may be subject to the GDPR. We advise you to consult with legal professionals to determine whether your company falls under GDPR requirements.

Salesforce has provided extensive information on its website with guidance to help accelerate your GDPR compliance journey within Salesforce, including for the Salesforce Platform, Sales Cloud, Service Cloud, Community Cloud, Marketing Cloud, Commerce Cloud, and Pardot.

Salesforce.org has similarly analysed our products built on the Salesforce Platform against GDPR requirements, identified and deployed enhancements, and generated documentation to help our customers meet their compliance objectives. As such, the following documentation is intended to supplement the guidance provided by Salesforce with use cases, examples, tips, and other considerations specific to our applications, including the Nonprofit Success Pack (NPSP), Volunteers for Salesforce (V4S), Education Data Architecture (EDA), and Student Success Hub (SSH).

As an important reminder, while the information provided here and from Salesforce is intended to help you navigate possible ways to meet your compliance needs, these are only guides and not determinative or guarantees of satisfying any legal rule. It is up to you to determine whether your use of the Salesforce Services or Salesforce.org applications is covered by, or compliant with, a law or regulation. We suggest you consult with a legal professional regarding your legal obligations.

Data Deletion

You may need to delete customer data in order to comply with data protection and privacy regulations, including the GDPR. We provide examples of common constituent requests, tips, and considerations that may help you determine how best to approach deletion requirements as they apply to your organisation. Data Deletion for Einstein for Nonprofits .

Consent Management

The GDPR, as well as other data protection and privacy regulations, imposes requirements around obtaining, maintaining, and withdrawing consent, and other rights of subjects including objections to processing personal data. To help inform your approach to meeting these obligations, we provide examples of common constituent requests, tips, and other considerations. Don't forget to also check out the new Individual object from Salesforce for tracking privacy preferences within your organisation for Contacts, Leads, Person Accounts, and custom objects. Consent Management for Einstein for Nonprofit .

Restriction of Processing

You may need to restrict or limit access and processing of data in order to comply with data protection and privacy regulations, including the GDPR. We provide examples on ways to restrict forms of data processing so you can make decisions on how best to comply with such requirements as they apply to your organisation. Restrict Data Processing for Einstein for Nonprofits .

Data Portability

The GDPR grants individuals in certain situations the right to get an export of their data. We provide examples of common requests and things to consider when evaluating your approach to data exports. Data Portability for Einstein for Nonprofits .

Einstein for Nonprofits Data Deletion

Data Deletion for Einstein for Nonprofits

Under various data protection and privacy regulations, you may be required to delete personal data of a constituent, such as in response to a GDPR right of erasure request. The following are examples of common requests, considerations, and related procedures to help you determine an action plan for complying with data erasure situations.

Not all deletion methods completely erase records from the database. Deleting a record may only move it to the Recycle Bin, and therefore personal data can still be accessed and restored. If you are required under a law or otherwise to ensure records are erased, be sure that you understand how record deletion works within Salesforce, and how to remove personal data from your instance in ways that meet your obligations.

We offer the following examples of common requests and considerations to help you plan how best to honour constituent requests around data deletion. These are only suggestions for your review, and not guaranteed steps for ensuring compliance with any legal rule.

Keep in mind that addressing constituent requests, including those provided for under the GDPR, can be challenging. A one-size-fits-all strategy may not always work, and you may need to adjust your approach when balancing organisational needs and legal obligations. For example, if exporting personal data to satisfy a GDPR data portability request may violate someone else's rights, you might consider narrowing the fields in scope rather than exporting all data. If deleting personal data to satisfy a GDPR erasure request may conflict with other requirements around record preservation, you might consider anonymising certain fields rather than wholesale deletion.

As always, there are pros and cons to each approach, including legal and business impacts and risks, and you are responsible for your own compliance obligations in your use of the Salesforce Services and Salesforce.org applications. You should work with your advisors, including legal counsel, to determine whether you are covered under a legal requirement, and come up with a compliance plan that's best for your organisation.

Salesforce resources:

- Data Deletion: Delete Personal Data
- Delete Records
- Recycle Bin
- Empty Specific Records out of the Recycle Bin
- Hard Delete Records
- Data Backup

Important
Remember to review both Salesforce Platform documentation AND Salesforce.org product-specific documentation. In addition to the information provided in the table below, review:

- Data Deletion for Sales Cloud
- Data Deletion for Salesforce Platform

Common Constituent Request	Actions to Consider	Things to Consider
A donor has stopped giving and wants his personal data to be removed from your system.	Delete Records	Consider deleting these records and field data for your donor. • Contact • Tasks • Calendar events • Personal data in unindexed, free-text fields You can find personal data in unindexed fields by exporting the data, and then searching for the information. You may also consider deleting: • Opportunities • Recurring Donations • Cases • Leads • Notes • Affiliations • Relationships • Addresses • Households • Household Accounts • NPSP Data Import records **NOTE**: In order to preserve donation history, consider assigning Opportunities to an anonymous or placeholder Account. If you maintain a Sandbox environment, you may want to refresh the environment afterwards to remove that constituent's data from it, or log into the Sandbox and manually remove the data.

Common Constituent Request	Actions to Consider	Things to Consider
A volunteer has died and her spouse has requested that you remove her from the system.	Delete Records	In addition to deleting the volunteer's Contact or Lead record, consider deleting: • Tasks • Notes • Calendar events • Household • Household Account • Addresses • Personal data in unindexed, free-text fields You can find personal data in unindexed fields by exporting the data, and then searching for the information. **NOTE**: In order to preserve Volunteer Hours metrics, consider assigning Volunteer Hours to an anonymous or placeholder Contact record. If you maintain a Sandbox environment, you may want to refresh the environment afterward to remove that customer's data from it, or log into the Sandbox and manually remove the data.
A constituent doesn't want you to store her email address and phone number.	Manage Contacts Manage Accounts Manage Custom Objects	Consider deleting data in any fields that store your constituent's email address and phone number. NPSP also includes these custom email and phone fields and objects: • Personal Email • Work Email • Alternate Email • Matching Gift Email • Work Phone • Household Phone • Matching Gift Phone • Address Object If you've created other records or activities related to your constituent, consider removing her email address and phone number from those records, and from Salesforce standard Email and Phone fields.

Consent Management for Einstein for Nonprofits

Consent Management for Einstein for Nonprofit

Various data protection and privacy laws, such as the GDPR, impose requirements around obtaining, maintaining, and withdrawing consent and otherwise honouring certain preferences of individuals in the processing of their personal information. We provide examples, considerations, and tips to help you determine ways to comply with constituent preferences around contact with, or from, your organisations.

When managing consent and certain other data privacy preferences, you may consider using Salesforce's new Individual object. The Individual object is neither pre-enabled in your system nor pre-configured to work with Salesforce.org applications, but you can enable and implement it using Salesforce customisation tools. Whether and how best to utilise the Individual object for your organisation is up to you. Salesforce.org will continue to evaluate the Individual object and how we may support it in future releases of our applications.

We offer the following examples of common requests and considerations to help you plan how best to honour constituent consent-related requests. These are only suggestions for your review, and not guaranteed steps for ensuring compliance with any legal rule.

Keep in mind that addressing constituent requests, including those provided for under the GDPR, can be challenging. A one-size-fits-all strategy may not always work, and you may need to adjust your approach when balancing organisational needs and legal obligations. For example, if exporting personal data to satisfy a GDPR data portability request may violate someone else's rights, you might consider narrowing the fields in scope rather than exporting all data. If deleting personal data to satisfy a GDPR erasure request may conflict with other requirements around record preservation, you might consider anonymising certain fields rather than wholesale deletion.

Depending on Einstein for Nonprofits user configuration and consent management settings, the following output can be displayed on Contact cards:

- No results are displayed if the predictive metrics fields are not populated.
- If the `Don't Profile` field is checked, then a yellow warning icon and a **Don't Profile** badge are displayed on the Predictive Metrics header when predictive metrics are loaded. The `Don't Profile` field is located on the individual record that the Contact is associated with and it ensures that the user's data is not used for future modeling.

As always, there are pros and cons to each approach, including legal and business impacts and risks, and you are responsible for your own compliance obligations in your use of the Salesforce Services and Salesforce.org applications. You should work with your advisors, including legal counsel, to determine whether you are covered under a legal requirement, and come up with a compliance plan that's best for your organisation.

Salesforce resources:

- Store Customers' Data Privacy Preferences
- Consent Management: Track Customer Consent
- Enable Tracking and Storage of Certain Data Privacy Preferences
- Best Practices for Tracking Data Privacy
- Consent Management for Marketing Cloud
- Consent Management for Pardot

Important

Remember to review both Salesforce Platform documentation AND Salesforce.org product-specific documentation. In addition to the information in this table, review:

- Consent Management for Sales Cloud
- Consent Management for Salesforce Platform

Common Constituent Request	Actions to Consider	Things to Consider
Some of your constituents don't want to receive calls, emails, or postal mail from your organisation.	Manage Contacts Manage Leads Delete Records	You may consider deleting information in these Contact or Lead fields. • Phone • Home Phone • Other Phone • Mobile • Email • Postal Address • Other Address NPSP also includes these custom email and phone fields and objects: • Personal Email • Work Email • Alternate Email • Matching Gift Email • Work Phone • Household Phone • Matching Gift Phone • Address Object For Contacts and Leads, consider these options: • Email Opt Out • Do Not Call • Do Not Contact • Volunteer Auto-Reminder Email Opt Out
Some of your constituents don't want to hear from your organisation, unless they specifically opt in.	Manage Contacts Manage Leads Delete Records	For Contacts and Leads, consider these options: • Email Opt Out • Do Not Call • Do Not Contact Consider deleting phone numbers, email addresses, and mailing addresses, unless your constituents give you consent to use them. Refrain from sending marketing materials. Consider removing data from Salesforce standard Email and Phone fields.

Common Constituent Request	Actions to Consider	Things to Consider
A volunteer has requested that you do not store her email address and phone number.	Manage Contacts Manage Leads	You may consider deleting information in fields that store your volunteer's email address and phone number. • Phone • Home Phone • Other Phone • Mobile • Email • Postal Address • Other Address NPSP also includes these custom email and phone fields and objects: • Personal Email • Work Email • Alternate Email • Matching Gift Email • Work Phone • Household Phone • Matching Gift Phone • Address Object Remind your volunteer that you won't be able to contact her about volunteer opportunities.

Restrict Data Processing for EFN

Restrict Data Processing for Einstein for Nonprofits

In order to comply with certain data protection and privacy regulations, you may be required to restrict certain of your constituents' data within Salesforce, including for Salesforce.org applications. For example, the GDPR, under limited circumstances, allows a subject's data to remain in storage but with access and processing of the data frozen if and until such time as the restriction is lifted.

We offer the following examples of common requests and considerations to help you plan how best to honour constituent requests around restrictions of data processing. These are only suggestions for your review, and not guaranteed steps for ensuring compliance with any legal rule.

Keep in mind that addressing constituent requests, including those provided for under the GDPR, can be challenging. A one-size-fits-all strategy may not always work, and you may need to adjust your approach when balancing organisational needs and legal obligations. For example, if exporting personal data to satisfy a GDPR data portability request may violate someone else's rights, you might consider narrowing the fields in scope rather than exporting all data. If deleting personal data to satisfy a GDPR erasure request may conflict with other requirements around record preservation, you might consider anonymising certain fields rather than wholesale deletion.

As always, there are pros and cons to each approach, including legal and business impacts and risks, and you are responsible for your own compliance obligations in your use of the Salesforce Services and Salesforce.org applications. You should work with your advisors, including legal counsel, to determine whether you are covered under a legal requirement, and come up with a compliance plan that's best for your organisation.

Salesforce resources:

- Restriction of Processing: Restrict How to Process Personal Data
- Export Backup Data
- Export results of SOQL query from workbench
- Export Data with Data Loader

Important
Remember to review both Salesforce Platform documentation AND Salesforce.org product-specific documentation. In addition to the information in this table, review:

- Restrict Data Processing for Sales Cloud
- Restrict Data Processing for Salesforce Platform

Einstein for Nonprofits Data Portability

Data Portability for Einstein for Nonprofits

When your constituents request it, prepare and pack up the data you've received from them so that you can work toward complying with GDPR data portability and export requirements. We offer the following examples of common requests and considerations to help you plan how best to honour constituent requests around data portability. These are only suggestions for your review, and not guaranteed steps for ensuring compliance with any legal rule.

Keep in mind that addressing constituent requests, including those provided for under the GDPR, can be challenging. A one-size-fits-all strategy may not always work, and you may need to adjust your approach when balancing organisational needs and legal obligations. For example, if exporting personal data to satisfy a GDPR data portability request may violate someone else's rights, you might consider narrowing the fields in scope rather than exporting all data. If deleting personal data to satisfy a GDPR erasure request may conflict with other requirements around record preservation, you might consider anonymising certain fields rather than wholesale deletion.

As always, there are pros and cons to each approach, including legal and business impacts and risks, and you are responsible for your own compliance obligations in your use of the Salesforce Services and Salesforce.org applications. You should work with your advisors, including legal counsel, to determine whether you are covered under a legal requirement, and come up with a compliance plan that's best for your organisation.

Salesforce resources:

- Data Portability: Give Customers Their Data when They Want It
- Export Backup Data
- Export results of SOQL query from workbench
- Export Data with Data Loader

Important

Remember to review both Salesforce Platform documentation AND Salesforce.org product-specific documentation. In addition to the information in this table, review:

- Data Export for Sales Cloud
- Data Export for Salesforce Platform

Common Constituent Request	Actions to Consider	Things to Consider
A constituent is moving out of state and will not be volunteering with you any more. He wants to take his information with him.	Export Data	Personal data can exist in many different records and fields. Consider exporting these records and fields for your constituent: • Contact • Tasks • Calendar events • Personal data in unindexed, free-text fields You can find personal data in unindexed fields by exporting the data, and then searching for the information. You may also consider exporting: • Opportunities • Recurring Donations • Affiliations • Relationships • Cases • Leads • Notes • Addresses • Households • Household Accounts • Volunteer Shifts • Volunteer Hours • NPSP Data Import records The export file should be in a structured, commonly used, machine-readable format that is transferable such as a .csv. And if that person no longer wants you to keep the personal data you've collected, you can delete it.

<table>
<tr><th>Common Constituent Request</th><th>Actions to Consider</th><th>Things to Consider</th></tr>
<tr><td>A major donor decided to not fulfil her pledge and will not make future donations.

She asked for the personal data you collected from her.</td><td>Export Data</td><td>Personal data can exist in many different records and fields.

Consider exporting these records and fields for your constituent:
• Contact
• Tasks
• Calendar events
• Personal data in unindexed, free-text fields

You can find personal data in unindexed fields by exporting the data, and then searching for the information.

You may also consider exporting:
• Opportunities
• Recurring Donations
• Affiliations
• Relationships
• Cases
• Leads
• Notes
• Addresses
• Households
• Household Accounts
• Volunteer Shifts
• Volunteer Hours
• NPSP Data Import records

The export file should be in a structured, commonly used, machine-readable format that is transferable such as a .csv.

And if that person no longer wants you to keep the personal data you've collected, you can delete it.</td></tr>
</table>