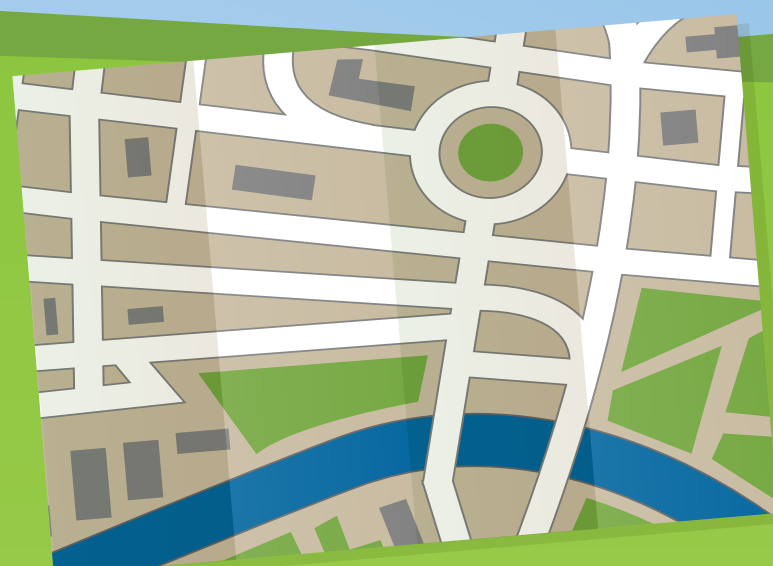


9

SALESFORCE TERMS EVERY NONPROFIT NEEDS TO KNOW

 501partners

Think of Salesforce as its own country, and these nine terms and ideas as the first words or phrases you need to get around. When you're exploring Salesforce, these terms will enable you to start using Salesforce smartly, and start you on the road to Salesforce fluency.



1 THE NONPROFIT STARTER PACK (NPSP):

Nonprofit-specific modules for Fundraising, Memberships, and Volunteer tracking, created by the Salesforce Foundation.



3 OBJECTS:

Multiple ways to identify and track your constituents, giving you identifier flexibility. Track your constituents as individual Contacts, company Accounts, and multiple contacts in in Household.

2 360-DEGREE VIEW:

The uniqueness of the Salesforce database is that it offers features for every department, giving you a 360-degree view of all your contacts and their interactions with your organization.



4 ACCOUNT MODEL:

Salesforce's method of grouping and tracking Individuals and Organizations the way that nonprofits naturally group them, with individual households as the focus. The newest release is the Household Model, while the older release is called the One-to-One Model.



5 AN INSTANCE:

Your Salesforce account, including all data, objects and fields.

6 THE IMPLEMENTATION:

The process of taking a standard Salesforce instance and customizing it to capture the data you need.



7 A CAMPAIGN:

A grouping of contacts. Use this to group your contacts by department, program, needs, or any other group of contacts you want to track and measure.

8 RELATIONSHIPS:

The connections between your contacts. Use this to indicate how people know each other.

9 AFFILIATIONS:

Connections between people and entities, such as companies and organizations. Useful to identify who is associated with a single entity.

Once you've got down the basic terminology, you also have insight into how Salesforce is structured, and how to work with it.



WANT TO GET STARTED WITH SALESFORCE, OR CUSTOMIZE YOUR INSTANCE WITH AN IMPLEMENTATION?

Check out the 501Partners Quickstart Launchpad for Salesforce, 501partners.com/quickstart to get your implementation ready in just two weeks, or our intensive one-day Salesforce training for the new or relatively new user, Salesforce Bootcamp 101, 501partners.com/bootcamp.


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