501partners

The Nonprofit Salesforce® Guide to Better Data

www.501Partners.com

CREATING Salesforce® SOLUTIONS FOR NONPROFITS

You already know that Salesforce is a multifaceted powerful platform to gather, track, and analyze operational data, especially for nonprofits. Whether you are new to Salesforce or a pro user who uses Salesforce Connectors with ease, you'll find something new in this ebook to help your nonprofit data practice.

This list of tips, tools, and shortcuts is a result of hundreds of hours spent supporting, consulting, and training nonprofit organizations. You'll find helpful tips (and even a few diagrams) that will save you time and frustration, including timesavers for:

1. Salesforce Terminology
2. Exporting Data
3. Data Migration
4. Running Reports
5. Creating Mailing Lists
6. Using Sandboxes
7. Keeping Track of the Federal Poverty Line in Salesforce

At 501Partners, we are committed to building capacity in the nonprofit sector. Understanding technology is a vital part of supporting your work and your success.

Enjoy!

Allan Huntley, CEO

1 Reference Guide to Salesforce Terminology

Think of Salesforce as its own country, and these nine terms and ideas as the first words and phrases you need to get around.

Once you understand this terminology, you're on your way to nonprofit Salesforce fluency with tracking constituents, segmenting them, grouping them, understanding their relationships with you, and customizing them into a working database that meets your needs.

1 THE NONPROFIT SUCCESS PACK (NPSP): Nonprofit-specific modules for Fundraising, Memberships, and Volunteer tracking. Created by the Salesforce Foundation.

2 360-DEGREE VIEW: The uniqueness of the Salesforce database is that it offers features for every department, giving you a holistic view of all your contacts and their interactions with your organization.

3 OBJECTS: Salesforce accomplishes the "360-degree view" by storing different types of information about your constituents in different places, then linking them all together. Demographic, employment, and donation information can be tracked easily and reported on in detail.

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

6 AN INSTANCE: Your Salesforce account, including all data, objects and fields.

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.

Want more information about these terms and phrases? Click to read all about them and download the infographic.

2 The Cloud Doesn't Always Have Your Back: Manual Backups Are Your Friend

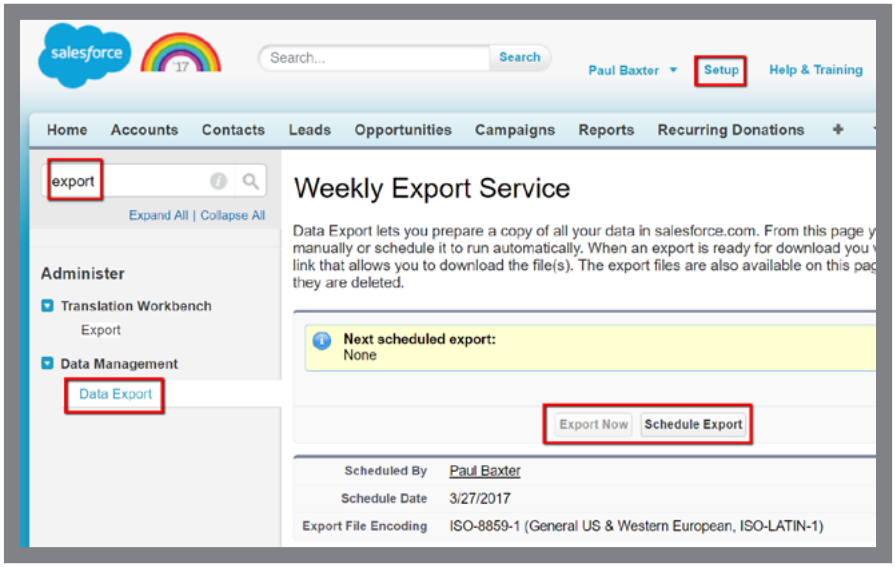
Using Salesforce effectively is often as much about habits as it is about technology. Here's a habit every nonprofit organization learns sooner or later: backing up your work.

You may wonder: "Isn't Salesforce in the cloud? Doesn't my account get backed up on servers from Kansas City to Kuala Lumpur? Why would I have to back up my account manually?"

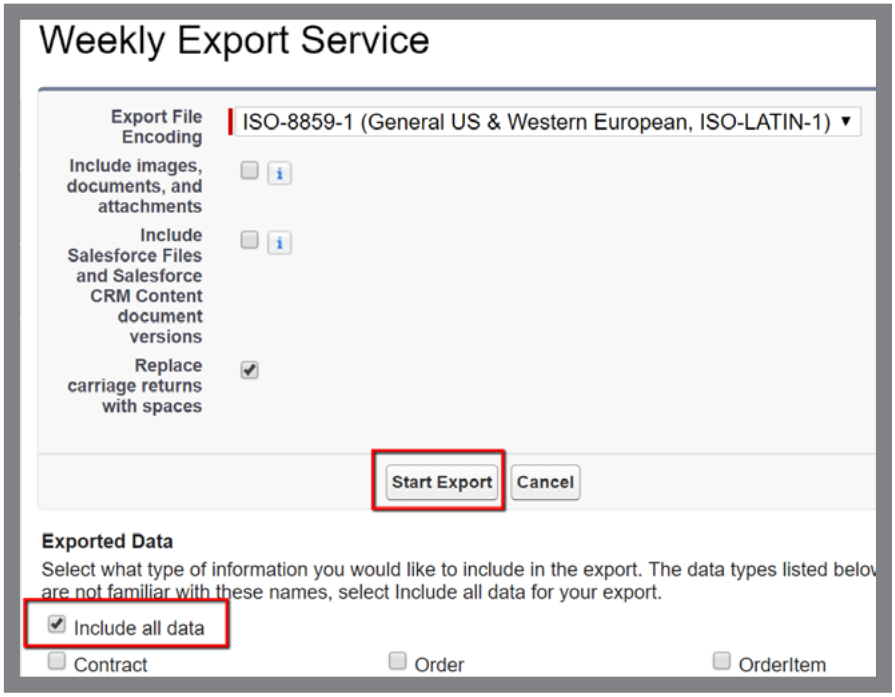
Yes, Salesforce is in the cloud.
True, it's backed up automatically to different servers.

But this is also true:
when you make large changes to your Salesforce data, you're stuck with the "last, best" version of your data.

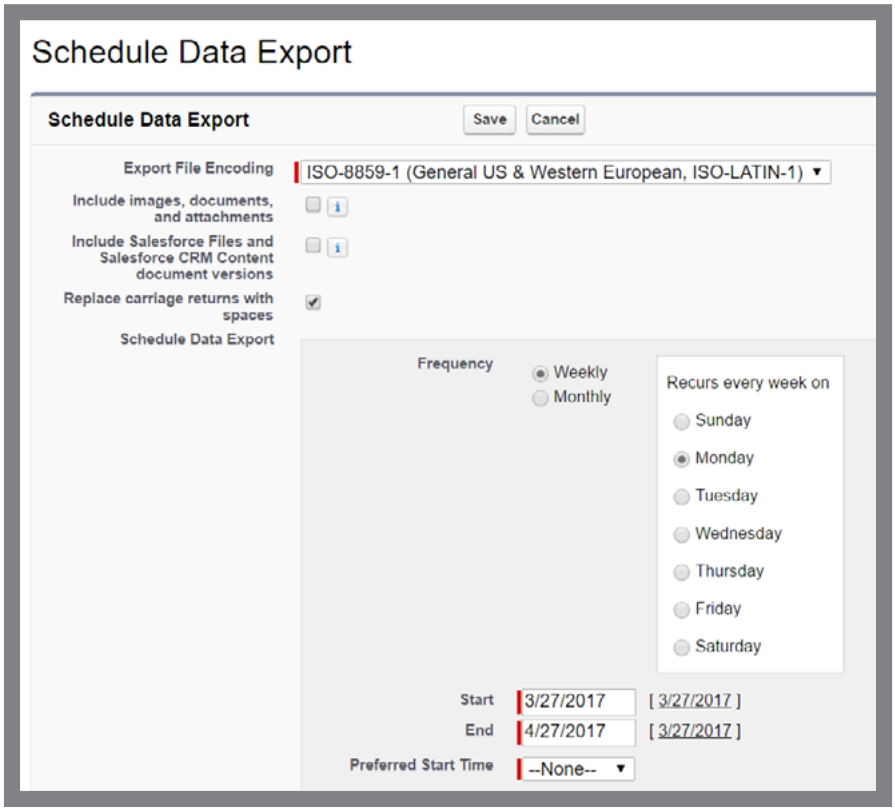
You can back up (or in Salesforce language, export) your data in two ways: on demand or regularly.



By clicking **Start Export** the process occurs immediately. Expect it to take from 30 minutes to several hours depending on the amount of data you have in your instance.



Schedule Export allows the export to occur automatically at a time you specify every week. We recommend that you set the export for the weekend or the middle of the night when the demand on your internet resources is lowest.



If you follow these steps, you will always have the most recent backup should something go awry. **Export your data weekly** to ensure that your data is 100% safe and secure.

Check out a detailed explanation of how to export your data safely.

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3 Use Excel for Nonprofit Data Migration

Preparing your data for mass migration into Salesforce is a tricky task, and can be incredibly time-consuming. The tools already built into Excel make this task so much easier, and most importantly, as accurate as possible. Take a deep breath, and get ready to migrate your data with peace of mind.

Follow three simple steps for mass migration happiness (four if you have New England contacts in Salesforce)**:**

1 PREPARE BY STORING NAMES IN SEPARATE CELLS

Salesforce requires that the **First Name** and **Last Name** fields be separated. Before you start trying to copy and paste each last name separately into a new cell.
Excel Tip: Click Data —> Text-to-Columns

2 BE SURE TO ADJUST YOUR RECORDS SO THAT NAMES APPEAR PROPERLY ON MAILING LABELS

When it's time to print out mailing labels for the annual appeal, the names will appear on the envelopes just the way they appear in Salesforce. This might result in sloppy labels if not adjusted properly. If your data is not consistent as regards case, you can fix it in Excel.
Excel Tip: =PROPER

3 IF YOU WANT TO JOIN SOME DATA TOGETHER, USE = CONCATENATE

You may also find data that needs to be joined together. In Salesforce's "Mailing Street" field, for example, it is best practice to include both the street and apartment or suite number, while many other products separate these.
Excel Tip: =CONCATENATE

4 JUST FOR NEW ENGLANDERS

In New England, we use a "0" as the first number in each zip code, e.g. 02114. That does not ordinarily present a problem, but Salesforce requires that data be exported in the form of a CSV file. One of the characteristics of CSV files is that it represents zip codes as ordinary numbers, which won't tolerate a number beginning with "0". (Note, this is not an issue with 9-digit zip codes like "02114-2474"). So, the LAST THING you should do before migrating your data is to make sure the zip codes are fixed.
Excel Tip: Zip Code Formatting

Check out the detailed explanation of all these Excel tips for data migration.

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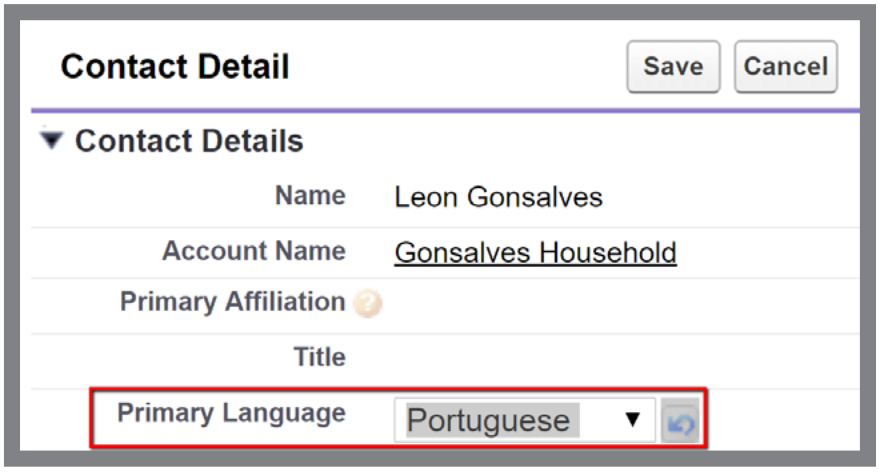
4 Tips to Increase Reporting Accuracy

At 501Partners, we work with clients to structure their Salesforce instances with the philosophy **"Plan the beginning with the end in mind."** This means understanding what reports you need to help you plan, evaluate, and modify your programs. Here are three "pro tips" to structure your instance so that you spend less time adjusting your reports and get the most value for your business planning.

A REPORTING TIP USE PICKLISTS, NOT TEXT FIELDS

Accurate reporting depends on clean, consistent data. Imagine you are collecting demographic data about your constituents and one of the response fields is "Primary Language." You could collect this information in a text field, but you might find you have responses as varied as "Portuguese, Portugese, Portughese, Port.," etc. One would have to anticipate every possible variation to get an accurate picture of the primary language used.

It's much more efficient to create a picklist. This limits the possible answers. In the example below, one must respond Portuguese, so you can report on it easily. For constituents whose language is not on the list, create a text box labeled "Language Other," so that you will still be able to accurately report on 90% or more of your constituents.



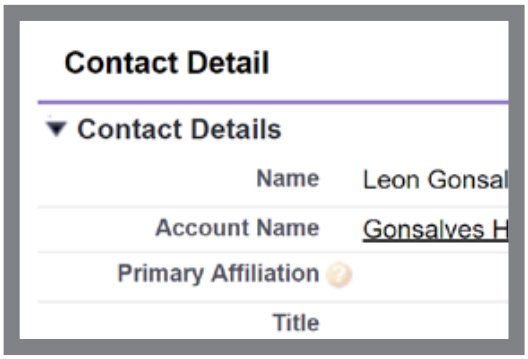
B

REPORTING TIP

USE MULTIPLE CHECKBOXES INSTEAD OF MULTI-PICKLISTS

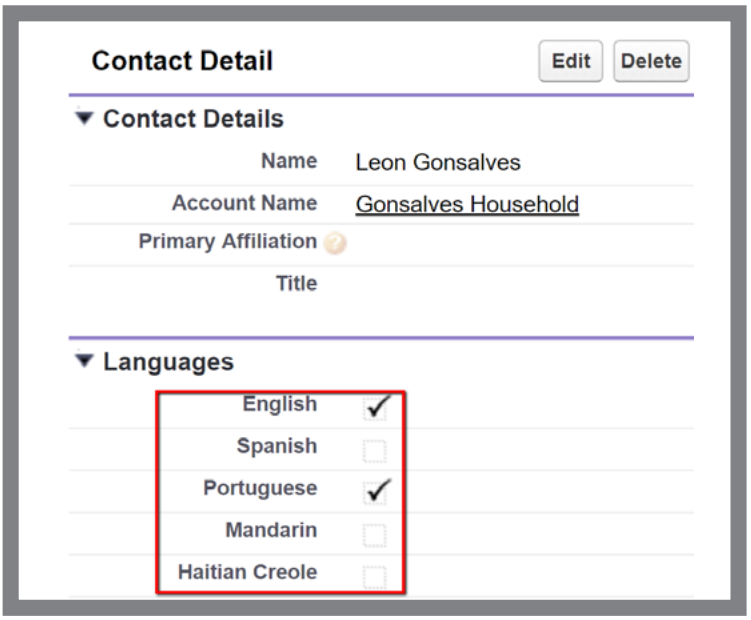
If you want to run a report of records that includes more than one language, we recommend that you use multiple checkboxes for accurate reporting instead of a multi-picklist. The multi-picklist field type seems to solve an important problem, namely, if you want the user to be able to select more than one response in a given field. But it does present a problem later on if you want to filter out two different responses.

Let's return to the above example about choosing languages. What if, instead of "Primary Language," you want to capture all the languages that a person speaks? A multi-picklist would allow a user to select both Portuguese and English.



This solution works perfectly in the event that you are only interested in looking at individual records one at a time. **If you try to run a report to tell you how many English speakers you have and how many Portuguese speakers you have, the multi-picklist will fail.** Instead of including Leon Gonsalves in both the "English" category and the "Portuguese" category, it will create a new category for him called "English; Portuguese."

If you want to run a report of records that include two languages, we recommend that you use multiple checkboxes for accurate reporting instead of a multi-picklist.



C

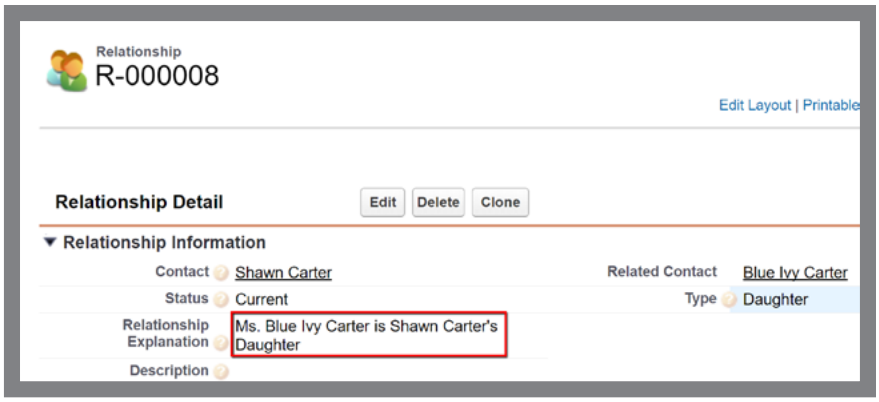
REPORTING TIP

FOR ACCURATE YOUTH PROGRAM REPORTING, SELECT HOUSEHOLDS, NOT INDIVIDUAL CONTACTS

Many organizations that serve children and youth are unsure which options to use to track and report on their constituents. Should these contacts be listed on a parent's Contact record, or identify them as individuals? While either method is acceptable from a data entry perspective, efficient reporting calls for individual records.

If you add children to the parent's record, you have to create fields like "Child 1," "Child 2," Child 3," etc. When it comes time to report, you would have to the include each of these fields in the report and then have some way to calculate the total number. It is inefficient, and it is easy to make a mistake.

With the Nonprofit Success Pack, each child can have her own record while still linked in a family through the Household Account function. You may also use the Relationship related list to distinguish parents from children within the household.



One reason some organizations are reluctant to create Contact records for their youth participants is that they do not want to accidentally send fundraising materials to the children.

This can be resolved by checking "Do Not Solicit" or "Do Not Mail" on all child records. Also, you can ensure that only the parents are listed on the mailing labels by controlling the Household Name feature (see Mailing Lists, below).

Check out a detailed explanation of how to set up your data to run the right reports.

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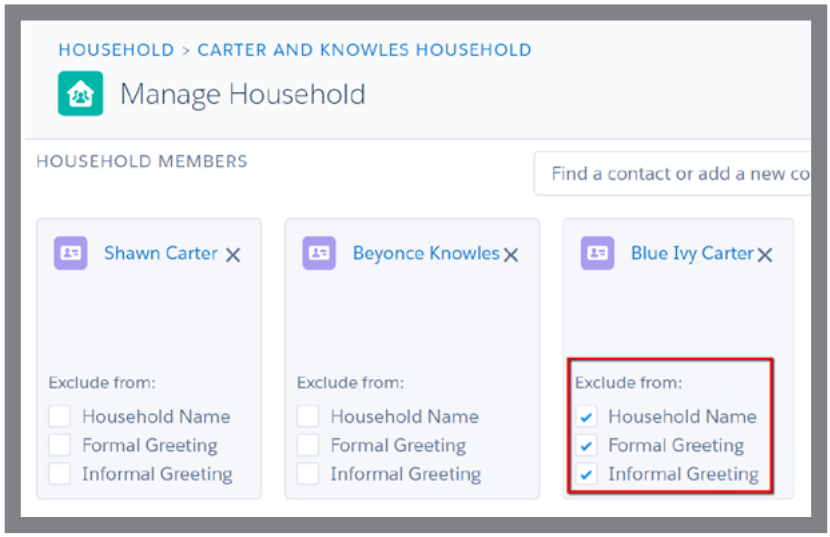
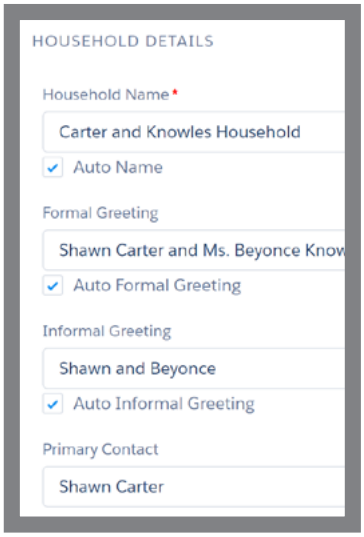
5 Create Mailing Lists Using Household Naming to Avoid Duplicates

When we create a report for a mailing list, the impulse is to use a Contact report. After all, most organizations send mail to individuals. This may have the unintended consequence, however, of sending the same mailing to two or more people in the same household. If Shawn Carter (AKA Jay-Z), Beyonce Knowles, and all their kids were Contacts, as recommended above, how would you limit the list only to go to Shawn & Beyonce ?

We recommend that you use an Account (or Household) report for mailing lists.
By using an Account report, only one piece of mail goes to an entire household, not to each Contact. Be sure to include Formal Greeting and/or Informal Greeting as a field in the list. You can manipulate the Greeting fields so that only adults are included, and filter your list to exclude all those who do not have a Greeting field.





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6 Using Developer Sandboxes

We have all had of those moments when we wished that our lives had an "Undo" button. Many people assume that Salesforce has one too, and they forge ahead without fear. The bad news is that **Salesforce does NOT have an undo button**. As an online platform, it really can't: once a command is sent to the server, it cannot be retrieved.

IMPORTANT

LIMITATIONS TO KEEP IN MIND:

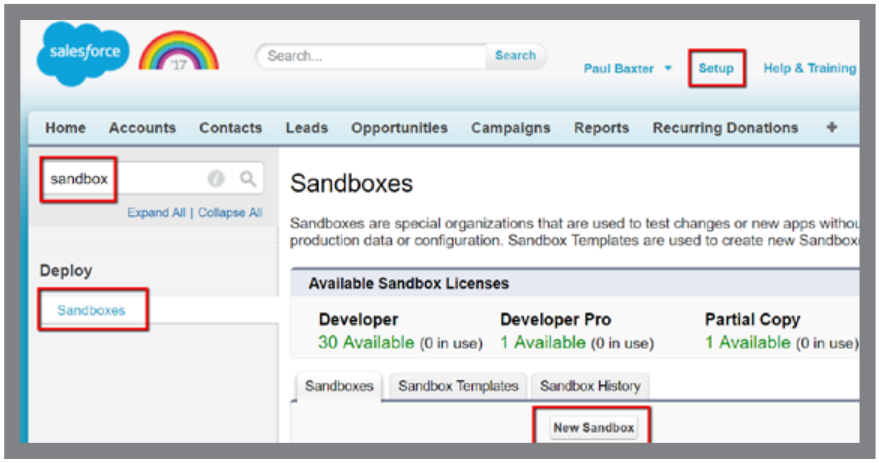
Developer Sandboxes are intended to hold only a fraction of the amount of data that your Production Salesforce holds. Sandboxes will not notify you when storage limits are reached: you will simply be unable to save new data.

However, Salesforce does have something that's just as good as an Undo button: it's called a **Sandbox**. A Sandbox enables users to test changes to their Salesforce without affecting their data. Once you get the Sandbox working, you can reproduce it in your organization's Salesforce account (called Production) -- and Voila! --you've created your own Salesforce Undo button.

Anytime you are contemplating a major change in your Production instance, we recommend testing it first in the Sandbox to identify any unanticipated consequences. When you create a Salesforce account, your organization automatically receives a certain number of Sandboxes, three of which are free: **Developer, Developer Pro, Partial Copy, and Full Copy.**

Here are a few tips for using Sandboxes:

- To create a Sandbox, click Setup > Display > Sandboxes > New Sandbox



MORE TIPS

IMPORTANT

RECOMMENDED BEST PRACTICE:

Even after you have successfully accomplished your project in a Sandbox, back up your Production account with Setup >> Data Export before making the changes there. That way, if anything unexpected crops up as you implement the changes, you can always return the Production account to its previous state.

It's like having two undo buttons at your disposal!

- You must populate Sandboxes separately with data using a data loader tool.
- Include data that is representative but not exhaustive of the data in your Production instance because Sandboxes has limited storage.
- Not everyone can create a Sandbox. If you have profiles for various users at your organization, it is likely that only the System Administrator can create the Sandbox. However, most users can read and edit the Sandbox if they are given the credentials.
- When you create a new Sandbox it will not be immediately available. Developer Sandboxes typically take up to a day to create, but if you have a lot of custom objects and custom fields it may take several days. A full Sandbox can take up to a month depending on the amount of data to be copied and transferred.
- Note that the Sandbox has a different Organization ID than the Production account (the Org ID begins with "00D"). This may be important if you use a procedure that hard codes the ID.
- If you are testing a connection between your Sandbox and a mass mailing tool, keep in mind that if the Sandbox includes real email addresses, you may run the risk of accidentally sending messages to people as you do your testing. To avoid this, be sure to edit all email addresses in the Sandbox to go to yourself or colleagues and not the original recipient.
- You can check your storage limits from within the Sandbox in **Setup —> Storage.**

Once you have created a Sandbox, you can use it again and again for multiple projects. However, if there have been considerable changes in your Production instance since you created the Sandbox, you may want to refresh it before using it again. By refreshing your Sandbox, you update it to the structure of your current instance without using up another Sandbox. This is especially important in the case of a Pro, Partial or Full Sandbox, which offers you only one license.

Check out a detailed explanation of how use a Sandbox, with screenshots

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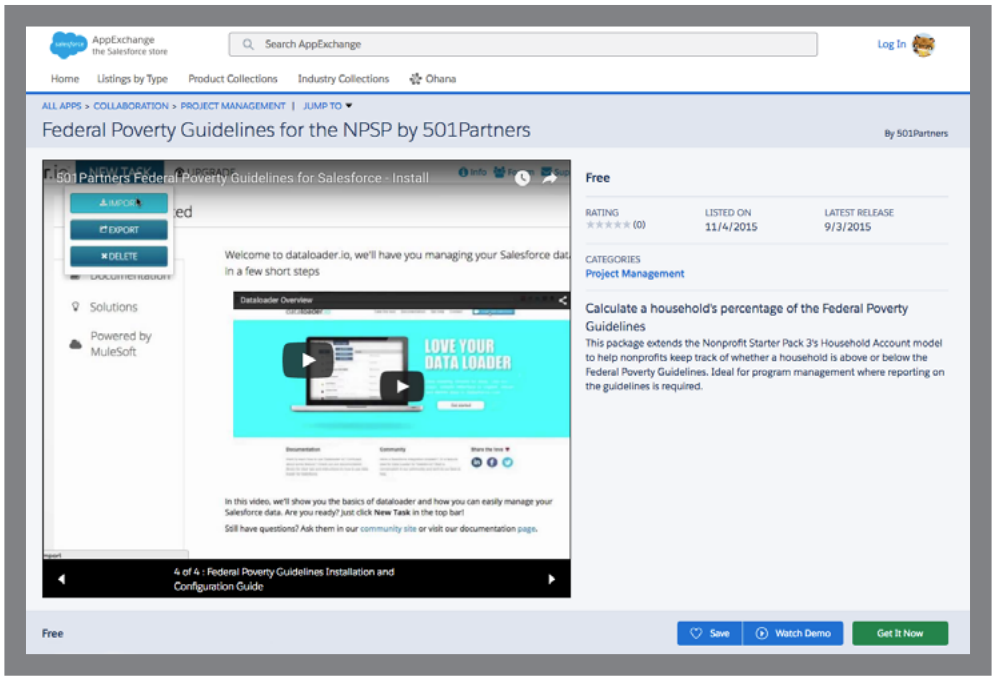
7 For Household Percentage of Federal Poverty Guidelines, Use the Federal Poverty Guidelines Free App

501Partners works with a lot of organizations that reference the Federal Poverty Line in order to provide certain services. We created the **Federal Poverty Guidelines App for Salesforce** as an extension of the Nonprofit Success Pack's Household Account model to help nonprofits keep track of this information without having to look it up in the federal tables or manually compute a percentage. The app is a fast and simple way for case managers, development professionals and administrators working with clients to calculate a household's percentage of the Federal Poverty Guidelines.



DOWNLOAD THE FREE APP

We hope you got a lot out of this eBook!

A LITTLE ABOUT US

Founded in 2012, 501Partners is a rapidly growing consulting company that provides Salesforce solutions to nonprofits. While 501Partners' main presence is in New England, we support nonprofits and their missions nationwide.

www.501Partners.com

OUR MISSION: PROVIDE SALESFORCE SOLUTIONS FOR NONPROFITS

It's as simple as that. We know nonprofits are vital to the health, growth, and well-being of our communities. 501Partners works with a wide range of nonprofit leaders and sectors. We design solutions that work with your business processes, solve problems, and create greater efficiency allowing you to focus on the work that matters most. Since our inception, 501Partners has worked with over 200 nonprofit organizations. We will gladly offer references of satisfied clients in your nonprofit sector.

OUR APPROACH: WHAT MAKES US DIFFERENT

Each nonprofit has its own unique mission, history and culture, and its own set of needs. 501Partners consultants take the time to get to know each organization intimately so that we can map the right solution for your business processes. Based on this partnership model, we develop individualized Salesforce solutions that are ideally suited to your needs.

Interested in learning more about our custom Salesforce services?

CONTACT US
www.501partners.com/contact-us