



# Salesforce Bootcamp 101 for Nonprofits Workbook





Thank you for attending a Salesforce Bootcamp! Your learning is our reward, and we learn from you, too! Please take a moment to share with us and with others what you've learned today that will enhance your Salesforce superpowers, or what tips and tricks will boost your effectiveness. How: Simply tweet your "aha!" learning moment to us on Twitter ([@501Partners](https://twitter.com/501Partners)) using the hashtag [#501Bootcamp](https://twitter.com/501Partners). We'll gladly reshare it, too.

Follow us on *Facebook* and *LinkedIn* for news and event listings in the Greater Boston nonprofit community, and resources on everything from nonprofit governance to App Reviews and Salesforce updates!

P.S. Receive exclusive monthly updates about local trainings, Salesforce resources, grant opportunities, and Early Bird discounts on our events. Sign up for our newsletter at [501partners.com](http://501partners.com) to be part of this!



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## OVERVIEW & TERMINOLOGY

### Contacts, Households & Organizations

**Contact Record:** The information about a person. Mailing and email address, and individual donation history are the types of information captured on a Contact Record. The Contact's relationship with a Household, Organizations, and other people are all tied to the Contact Record.

**Individual Contact:** A person whose primary relationship with your organization is as a private citizen – a donor, member, mailing list recipient, library patron, etc.

**Organization Contact:** This is a person whose main engagement with you is through their organization, and if they leave the organization, your relationship with the person is likely to stop.

**Organization (or Account)** – Name of nonprofit, school, foundation, company, etc.

**Organization/Account Record:** The information about the organization. The company address, web site, and phone number are on this screen.

**Household Account:** A grouping of family members who may interact with your organization as a unit (e.g., the Smith Household).

**Relationship:** A connection between two individual contacts

**Affiliation:** A connection between an individual contact and an organization

#### **A Note about Account Models:**

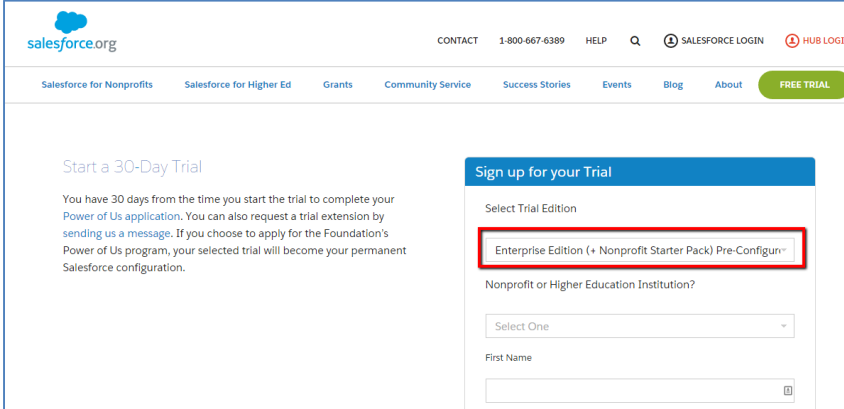
This manual assumes that your agency is using Salesforce with the Household Account Model. When Salesforce upgraded its Non Profit Starter Pack (version 3.0) in August 2014, it introduced this account model. While this decision has numerous benefits, it entails a difference in functionality for agencies that have downloaded the most recent version of Salesforce, compared to those who downloaded it previously. For more information on Account Models, see the Appendix or <https://powerofus.force.com/articles/Resource/NPSP-What-is-an-Account-Model>.



## DOWNLOADING A TRIAL INSTANCE OF SALESFORCE

One of the factors that makes Salesforce such a good fit for many nonprofits is that they provide up to 10 complementary site licenses. If you have not already downloaded Salesforce, you can do so in a few steps:

1. Go to [www.salesforce.org/start-trial](http://www.salesforce.org/start-trial) and complete the form. Be sure to request the selection “Pre-Configured for Donor Management” in order to get the Non-Profit Starter Pack.



2. There are two similar fields that you must complete correctly:
  - a. “Email”
  - b. “Username”

Make sure that your “Email” is a real email that you can access. Salesforce will send you password information to this address

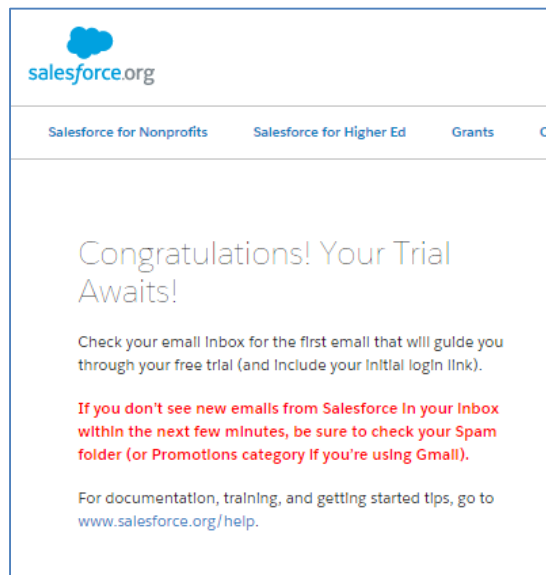




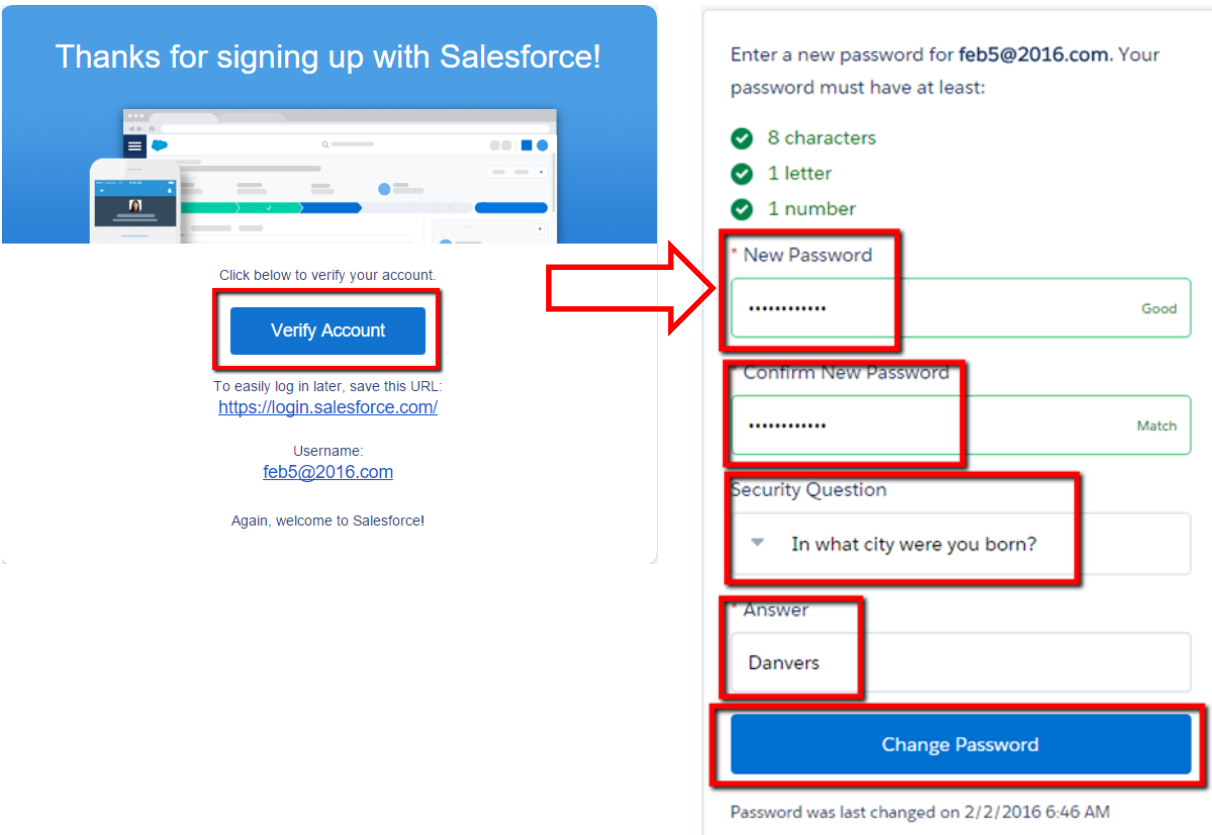
“Username” needs to be in the form of an email, but because this is a trial instance DO NOT use your real email. Salesforce remembers every username and will not let you use it again, even in your company’s real Salesforce account.

A screenshot of a Salesforce registration form. The form fields are highlighted in yellow. Two fields are also highlighted with a red border: the "Email" field containing "paul@501partners.com" and the "Username" field containing "feb5@2016.com". Below the form, there is a red warning message: "Your username must be in the form of an email address, but does not need to be an active email address. If this is the first time you are registering with Salesforce, use your email address. If you have previously registered with Salesforce, please provide a new unique username (ex: Instead of mytrial@gmail.com use mytrial1@gmail.com)."

Salesforce will confirm your new account and instruct you to check your email



3. Follow the instructions on the email to create a password for your account:



Thanks for signing up with Salesforce!

Click below to verify your account.

**Verify Account**

To easily log in later, save this URL:  
<https://login.salesforce.com/>

Username:  
[feb5@2016.com](mailto:feb5@2016.com)

Again, welcome to Salesforce!

Enter a new password for feb5@2016.com. Your password must have at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

**New Password** Good

**Confirm New Password** Match

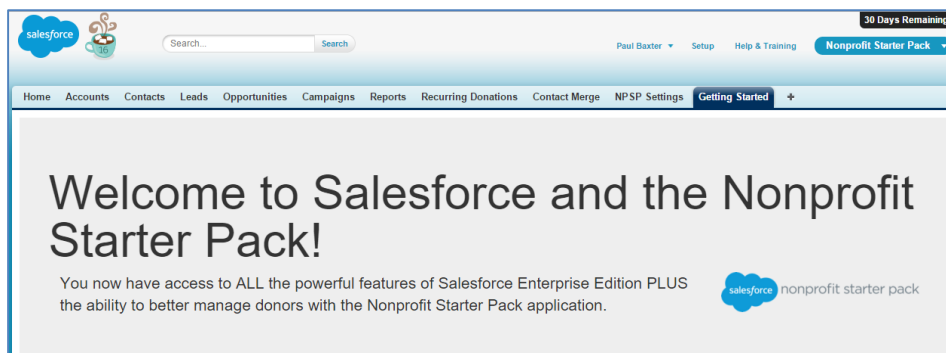
**Security Question**  
▼ In what city were you born?

**Answer**  
Danvers

**Change Password**

Password was last changed on 2/2/2016 6:46 AM

4. And you are ready to use Salesforce!



30 Days Remaining

Paul Baxter Setup Help & Training Nonprofit Starter Pack

Home Accounts Contacts Leads Opportunities Campaigns Reports Recurring Donations Contact Merge NPSP Settings **Getting Started**

# Welcome to Salesforce and the Nonprofit Starter Pack!

You now have access to ALL the powerful features of Salesforce Enterprise Edition PLUS the ability to better manage donors with the Nonprofit Starter Pack application.

salesforce nonprofit starter pack

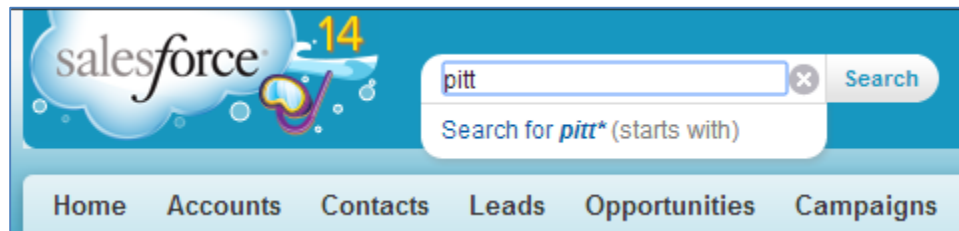


## ENTERING CONTACTS AND ORGANIZATIONS

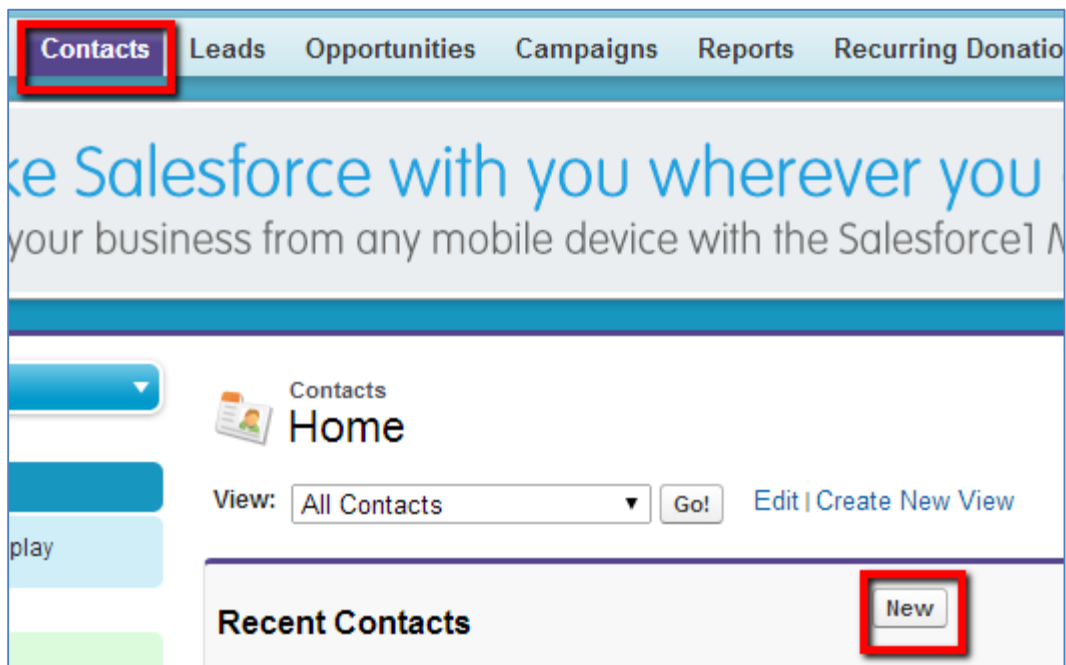
Exercise 1: Create Two Individual Contacts and connect them in a Household

**Individual Contact:** A person whose main engagement with your organization is on his/her own behalf  
**Household:** A grouping of family members who interact with your organization as a unit

1. Create an individual record for Brad Pitt.
  - 1) Search to see if "Pitt" is in the system

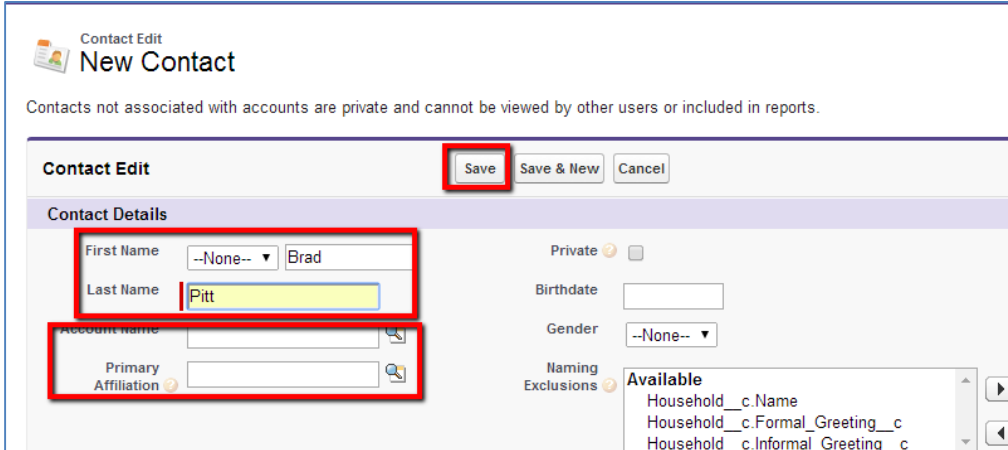


- 2) Click the Contacts tab and click "New"





- 3) Enter First Name “Brad”, Last Name “Pitt”
- 4) Leave Household and Account blank (this will automatically be populated)
- 5) Click “Save”



Contact Edit  
New Contact

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

Contact Edit **Save** Save & New Cancel

Contact Details

First Name --None-- Brad  
Last Name Pitt

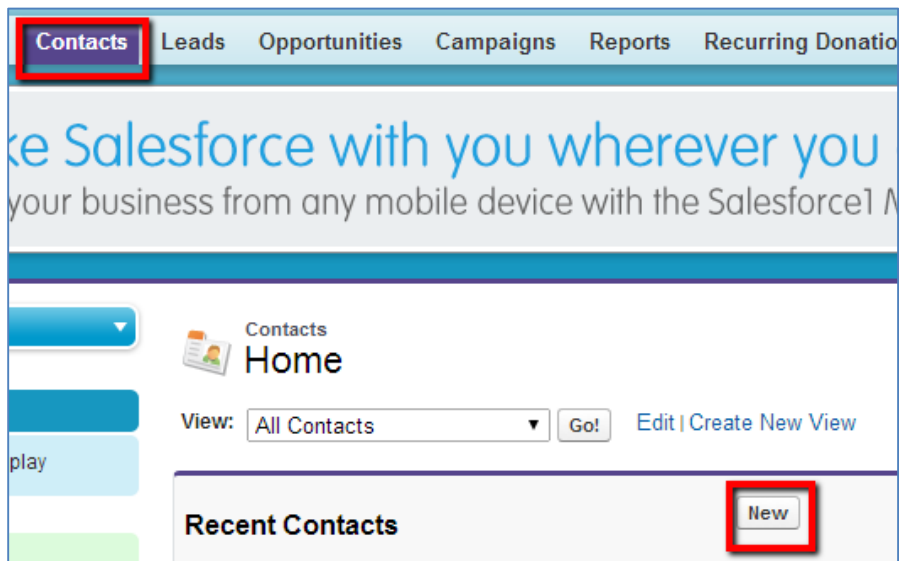
Account Name  
Primary Affiliation

Private   
Birthdate  
Gender --None--  
Naming Exclusions Available  
Household\_\_c.Name  
Household\_\_c.Formal\_Greeting\_\_c  
Household\_\_c.Informal\_Greeting\_\_c

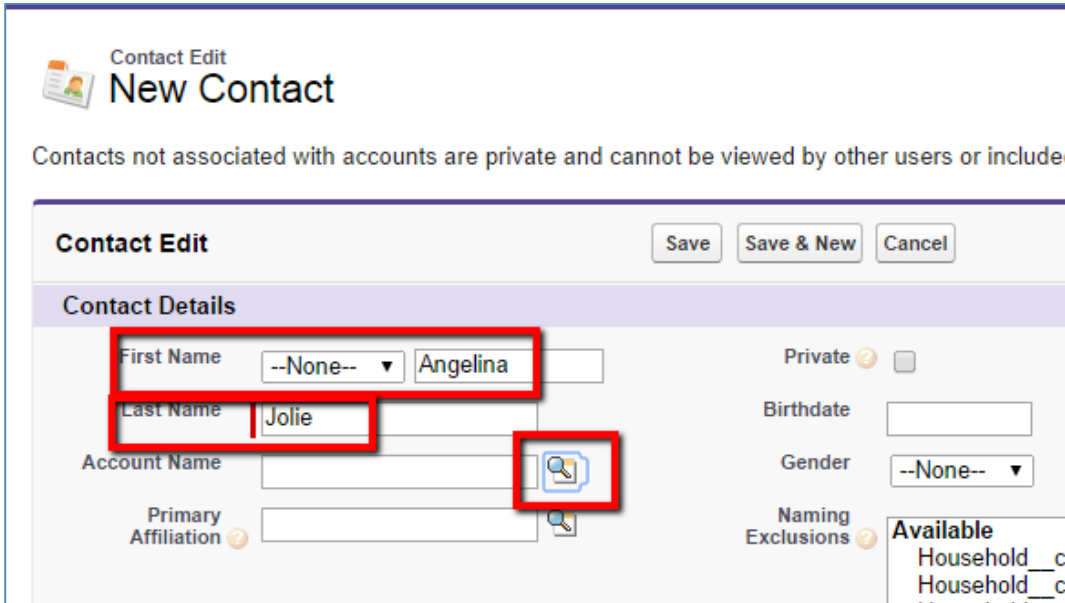
2. Create an individual record for Angelina Jolie
- 1) Search to see if “Jolie” is in the system



- 2) Click the Contacts tab and click “New”



- 1) Enter First Name “Angelina”, Last Name “Jolie.” DO NOT click “Save” In the Angelina Jolie Contact Detail field, click the “Lookup” button



Contact Edit  
New Contact

Contacts not associated with accounts are private and cannot be viewed by other users or include

Contact Edit

Contact Details

First Name   Private

Last Name  Birthdate

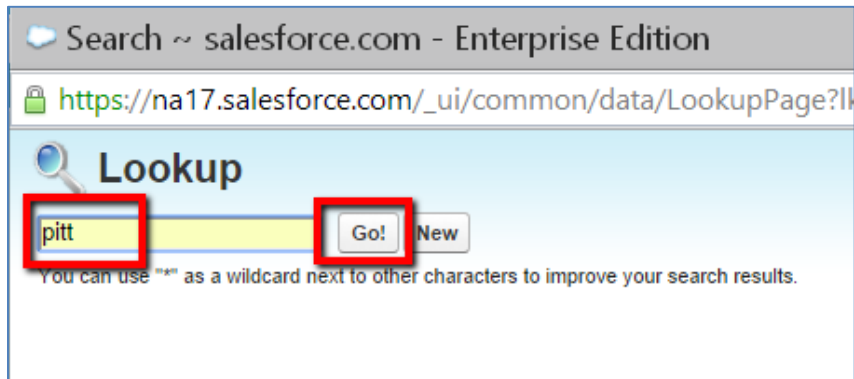
Account Name

Primary Affiliation

Gender

Naming Exclusions  Available Household\_c Household\_c

- 2) Into the Lookup Search Field, type “Pitt” and click “Go” to make Angelina Jolie join the Pitt Household:



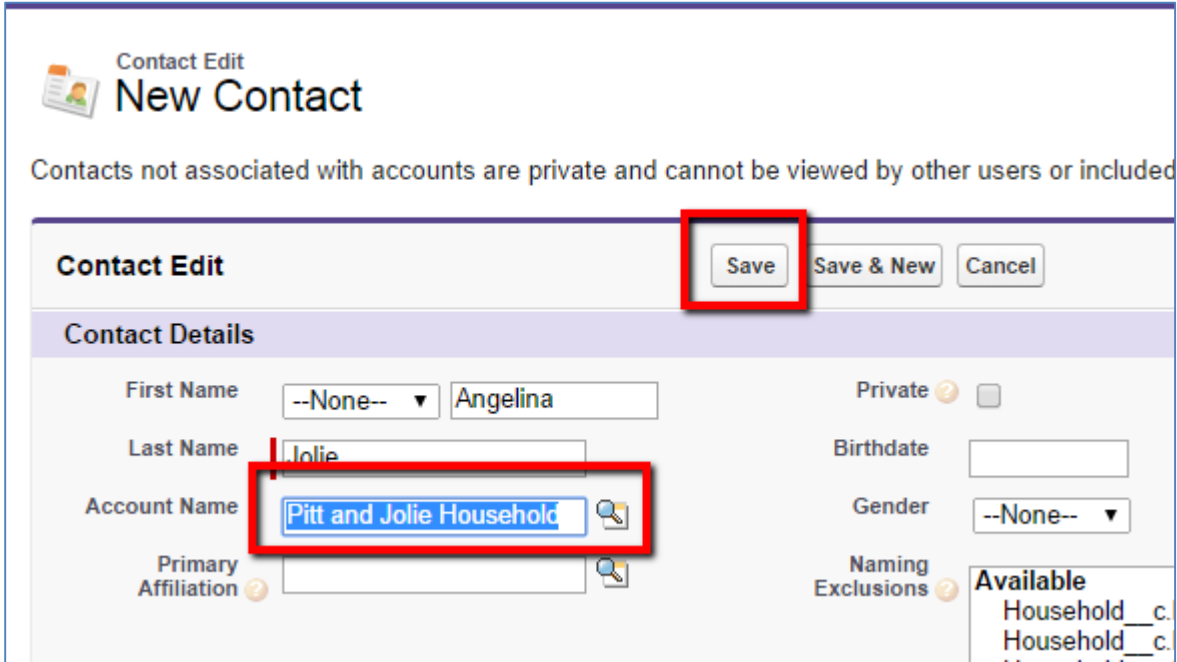
Search ~ salesforce.com - Enterprise Edition

[https://na17.salesforce.com/\\_ui/common/data/LookupPage?l](https://na17.salesforce.com/_ui/common/data/LookupPage?l)

Lookup

You can use "\*" as a wildcard next to other characters to improve your search results.

3) Angelina Jolie and Brad Pitt are now part of the same household. Click "Save":



Contact Edit  
New Contact

Contacts not associated with accounts are private and cannot be viewed by other users or included

Contact Edit **Save** Save & New Cancel

Contact Details

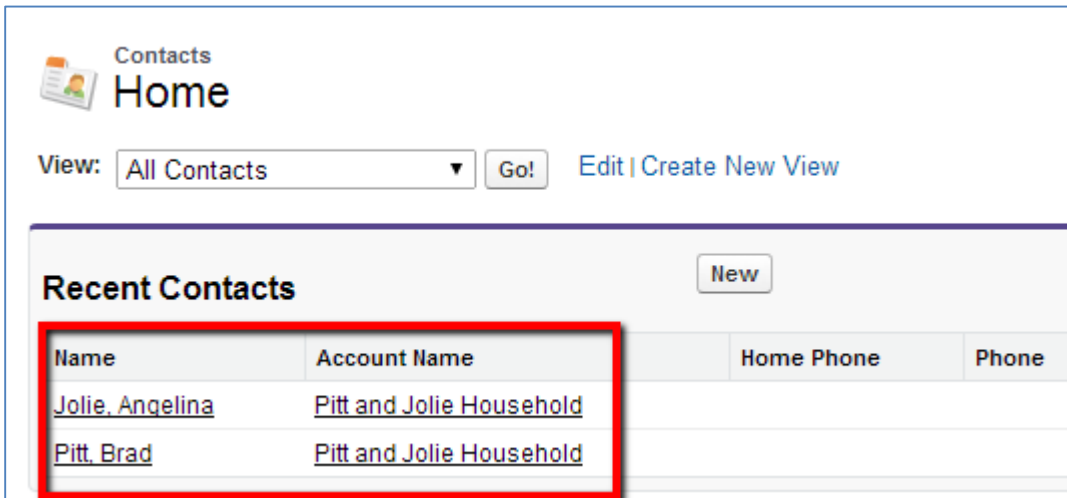
First Name --None-- ▾ Angelina Private

Last Name Jolie Birthdate

Account Name **Pitt and Jolie Household** Gender --None-- ▾

Primary Affiliation  Naming Exclusions  Available Household\_\_c. Household\_\_c.

4) Now check the Pitt and Jolie Household to see that Angelina Jolie is a member



Contacts  
Home

View: All Contacts ▾ Go! Edit | Create New View

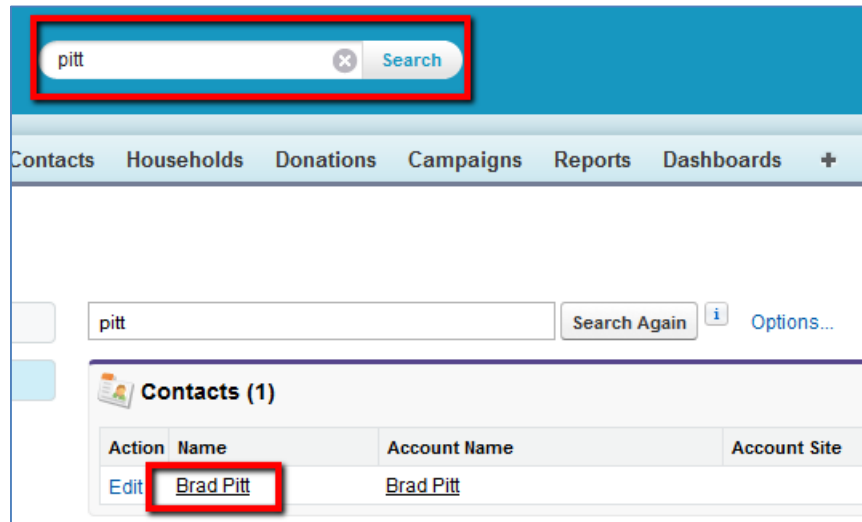
Recent Contacts

Name	Account Name	Home Phone	Phone
<a href="#">Jolie, Angelina</a>	<a href="#">Pitt and Jolie Household</a>		
<a href="#">Pitt, Brad</a>	<a href="#">Pitt and Jolie Household</a>		

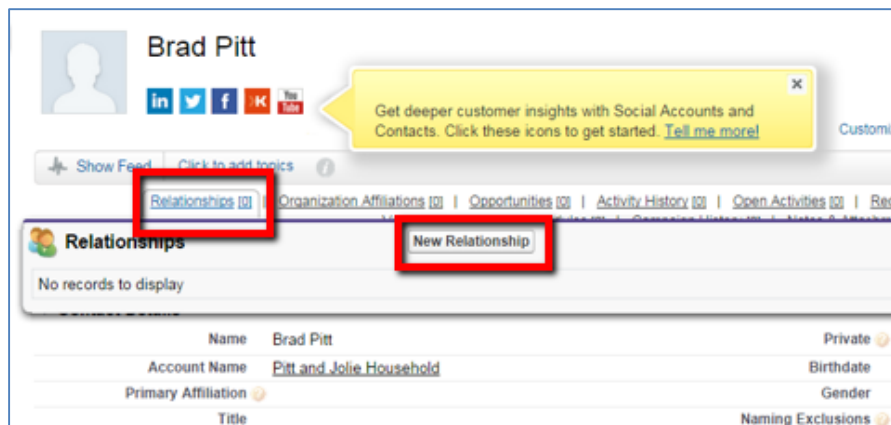
3. Specify the relationship between two records

**Relationship:** A connection between two individual contacts

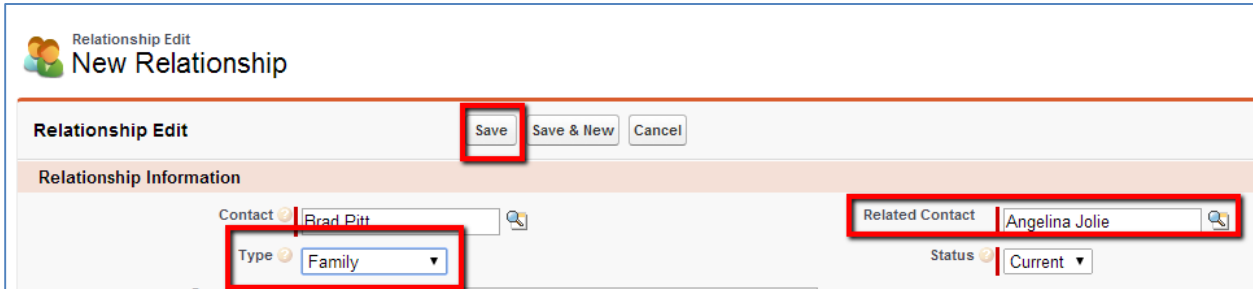
1) Search and pull up Brad Pitt's record



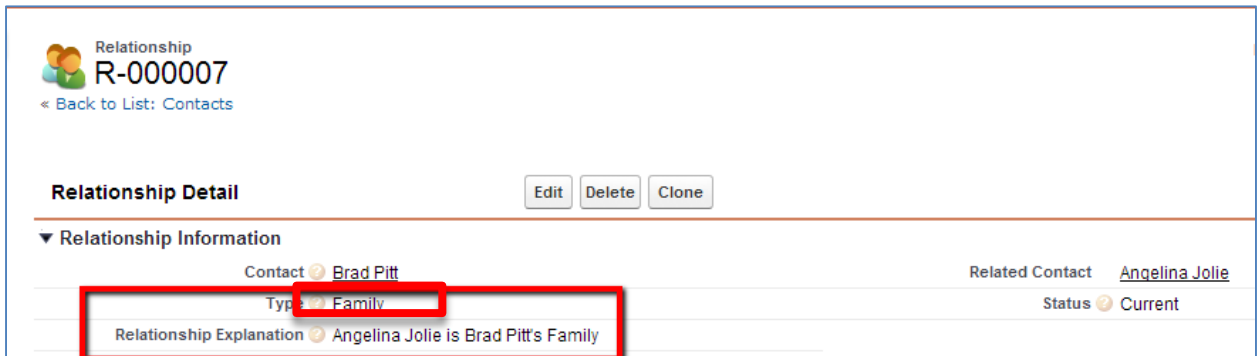
2) Hover over "Relationships" and select "New Relationship"



- 3) For Related Contact, use Lookup to search for “Jolie” and select record  
Specify Type as “Family” and press “Save”



You will see in the saved contact record under the Relationships section that “Brad Pitt is Angelina Jolie’s Family”



Now try your own! Create records for two individuals connected to your organization who are in the same Household and connect them.

## CREATE AN ORGANIZATION AND AN ORGANIZATIONAL CONTACT

**Organization/Account:** Nonprofit, school, foundation, company, etc.

**Organizational Contact:** This is a person whose main engagement with you is on behalf of the organization.

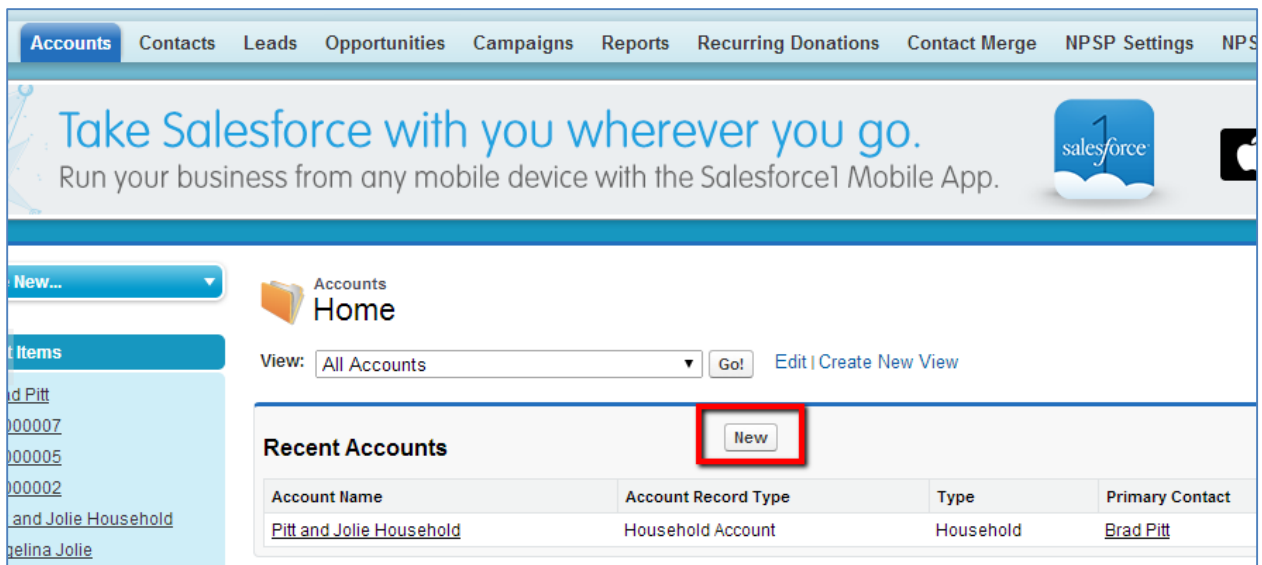
1. Create Organization “Gates Foundation”

- 1) Note: Always Search first to make sure the record doesn’t already exist  
Type “Gates” into the Search Bar and click “Search”



A search bar with the text "gates" entered. To the right of the text is a small 'x' icon to clear the search. Further right is a blue button with the word "Search" in white text.

- 2) Click on “Accounts” Tab (We will learn to re-name this).
- 3) Click “New” Button

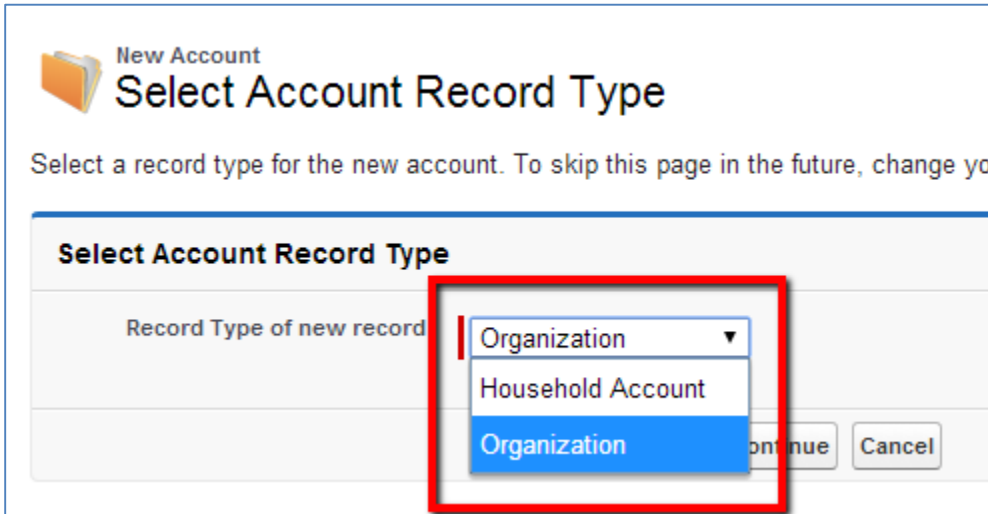


The screenshot shows the Salesforce interface for the Accounts page. At the top, there is a navigation bar with tabs for Accounts, Contacts, Leads, Opportunities, Campaigns, Reports, Recurring Donations, Contact Merge, NPSP Settings, and NPSP. Below this is a banner for the Salesforce mobile app. The main content area shows the Accounts Home page. On the left, there is a sidebar with a "New..." dropdown and a list of recent accounts. The main area displays a "View: All Accounts" dropdown and a "Go!" button. Below this is a "Recent Accounts" section with a "New" button highlighted in a red box. The table below shows one account: "Pitt and Jolie Household" with a "Household Account" record type, "Household" type, and "Brad Pitt" as the primary contact.

Account Name	Account Record Type	Type	Primary Contact
<a href="#">Pitt and Jolie Household</a>	Household Account	Household	<a href="#">Brad Pitt</a>



4) Select “Organization” for Record Type of new record



**New Account**  
**Select Account Record Type**

Select a record type for the new account. To skip this page in the future, change yo

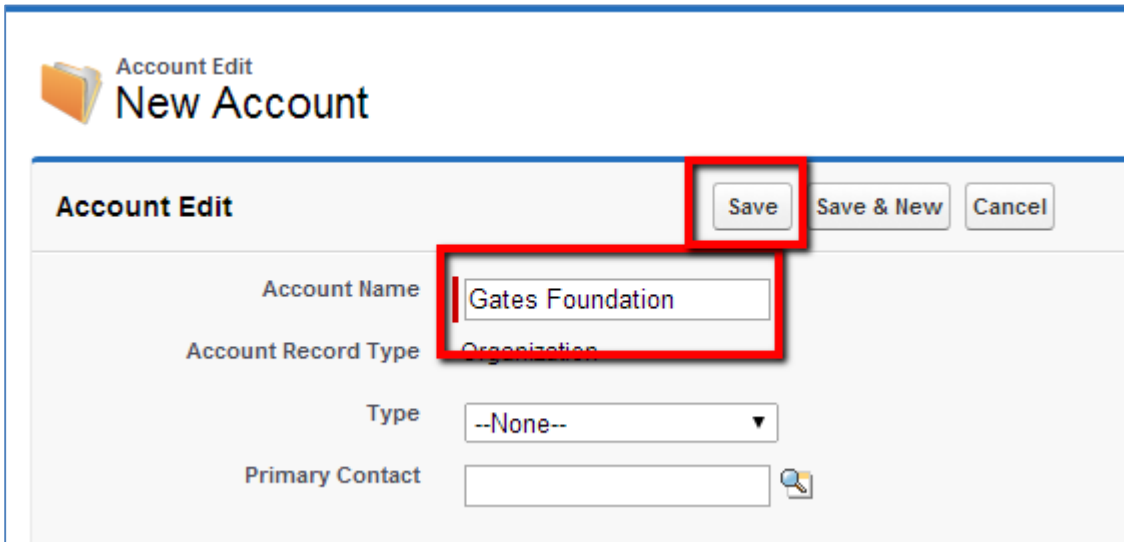
**Select Account Record Type**

Record Type of new record

- Organization
- Household Account
- Organization

Continue Cancel

5) Fill out Account Name – “Gates Foundation” and “Save”



**Account Edit**  
**New Account**

**Account Edit**

Save Save & New Cancel

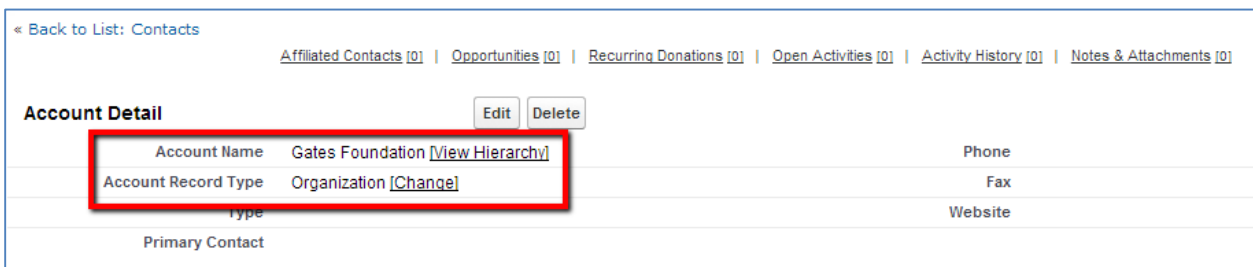
Account Name Gates Foundation

Account Record Type Organization

Type --None--

Primary Contact

6) The saved record will look like this:



< Back to List: Contacts

[Affiliated Contacts \[0\]](#) | [Opportunities \[0\]](#) | [Recurring Donations \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

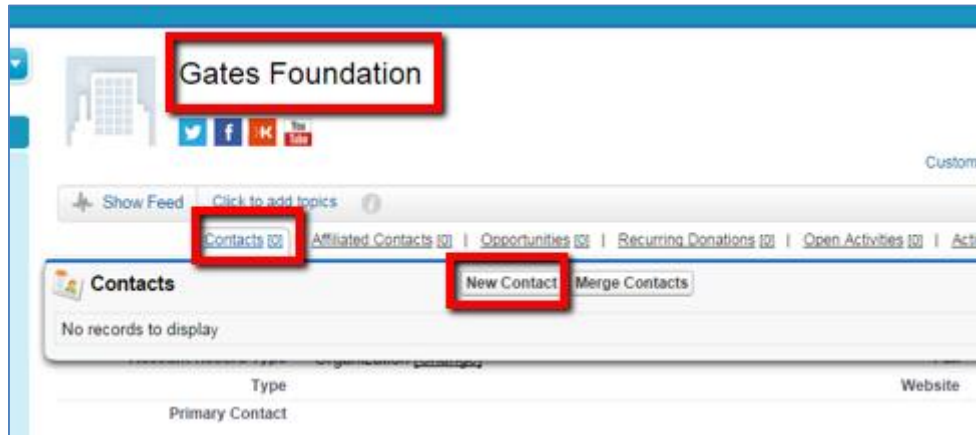
**Account Detail** Edit Delete

Account Name	Gates Foundation <a href="#">[View Hierarchy]</a>	Phone
Account Record Type	Organization <a href="#">[Change]</a>	Fax
Type		Website
Primary Contact		

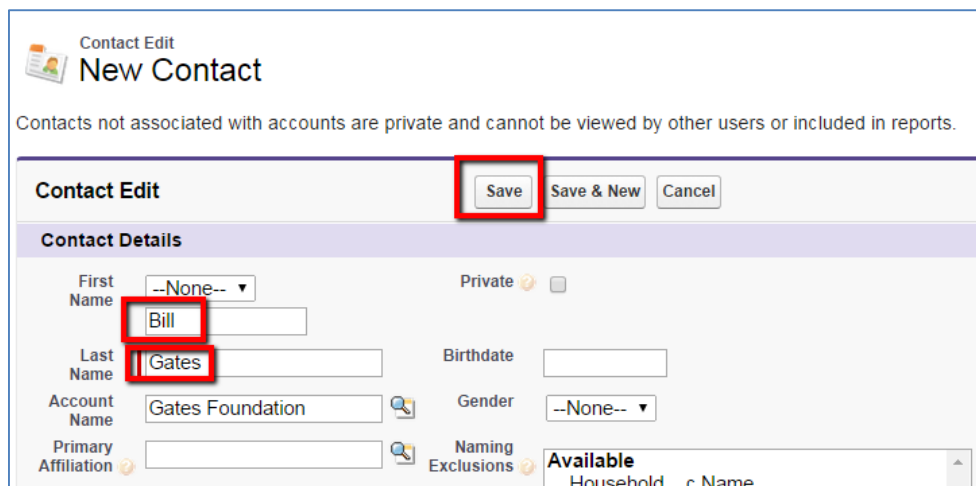


Create a Contact for “Bill Gates”

- 1) In the “Gates Foundation” contact record, hover over “Contact” link and click “New Contact”



- 2) Type in First Name “Bill” and Last Name “Gates” and click “Save”



Contact Edit

### New Contact

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

**Contact Edit**

**Contact Details**

First Name	--None--	Private	<input type="checkbox"/>
	<input type="text" value="Bill"/>		
Last Name	<input type="text" value="Gates"/>	Birthdate	<input type="text"/>
Account Name	Gates Foundation	Gender	--None--
Primary Affiliation	<input type="text"/>	Naming Exclusions	Available



3) Your saved contact record will look like this:

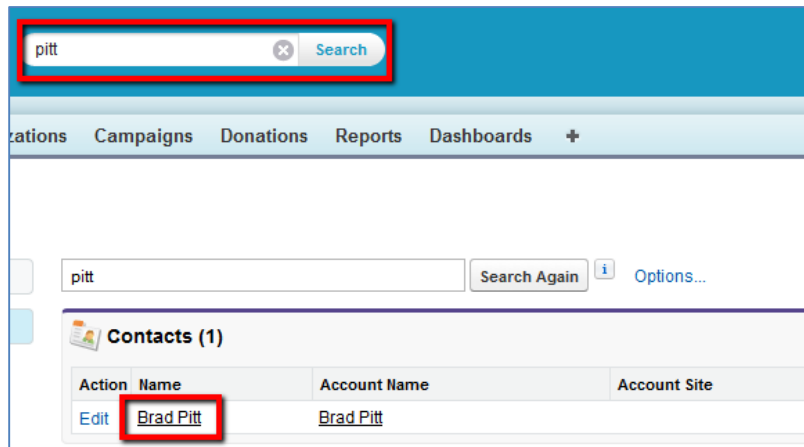


Now try your own! Create an Organizational record for your nonprofit and add yourself as an organizational contact.

## AFFILIATE AN INDIVIDUAL WITH AN ORGANIZATION

**Affiliation:** A connection between an individual contact and an organization

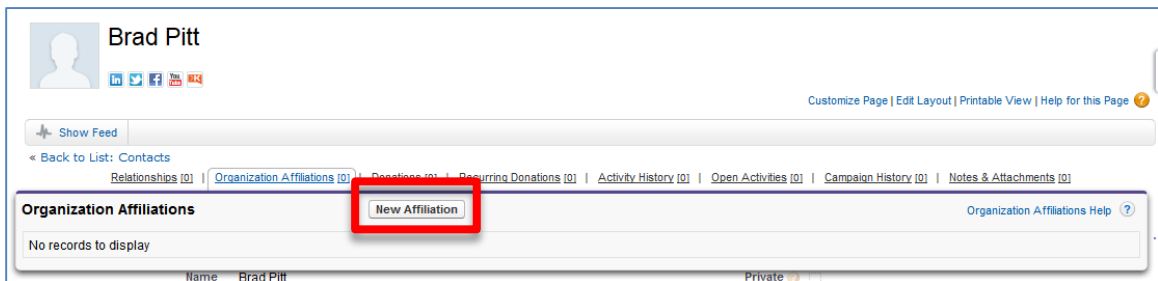
1. Connect Brad Pitt as a board member on the Gates Foundation
  - 1) Look up Brad Pitt in Search and choose Brad Pitt's contact record



The screenshot shows a search bar with 'pitt' entered and a 'Search' button. Below the search bar, there is a navigation menu with 'Organizations', 'Campaigns', 'Donations', 'Reports', and 'Dashboards'. A search results section shows 'pitt' with a 'Search Again' button and an 'Options...' link. Below this, a 'Contacts (1)' section contains a table with one row: 'Brad Pitt'.

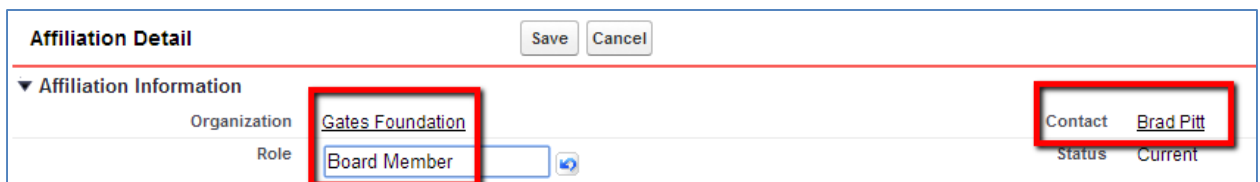
Action	Name	Account Name	Account Site
<a href="#">Edit</a>	Brad Pitt	Brad Pitt	

- 2) Click "New Affiliation"



The screenshot shows the contact profile for Brad Pitt. The 'Organization Affiliations' section is visible, with a 'New Affiliation' button highlighted in red. The section currently shows 'No records to display'.

- 3) Click Lookup and Search for "Gates Foundation" and click "Go!"
  - a. Click on Gates Foundation record and it will populate
  - b. In Role field, type "Board Member"  
Mark status "Current" & Press "Save"



The screenshot shows the 'Affiliation Detail' form. The 'Organization' field is set to 'Gates Foundation', the 'Role' field is set to 'Board Member', and the 'Contact' field is set to 'Brad Pitt'. The 'Status' is set to 'Current'. There are 'Save' and 'Cancel' buttons at the top right.

- 4) When you hover over "Organizational Affiliation," you will see the Gates Foundation



Organization Affiliations					New Affiliation	
Action	Affiliation: Affiliation Name	Account Name	Role	Status		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AF-000003</a>	<a href="#">Gates Foundation</a>	Board Member	Current		

Now try your own! Connect your own record to an organization you are affiliated with (but are not your primary place of employment).

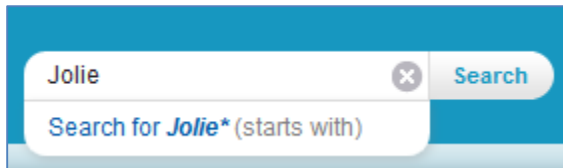
- 1) First create the Organization record
  - a. Organization → New → Organization Account → Name of Org → Save
- 2) Then find your contact record in the Search bar
- 3) Create a new organizational affiliation & connect to the organization you created  
(Notice you will have 2 affiliations in your record: one to your primary organization and the organization you just created.)



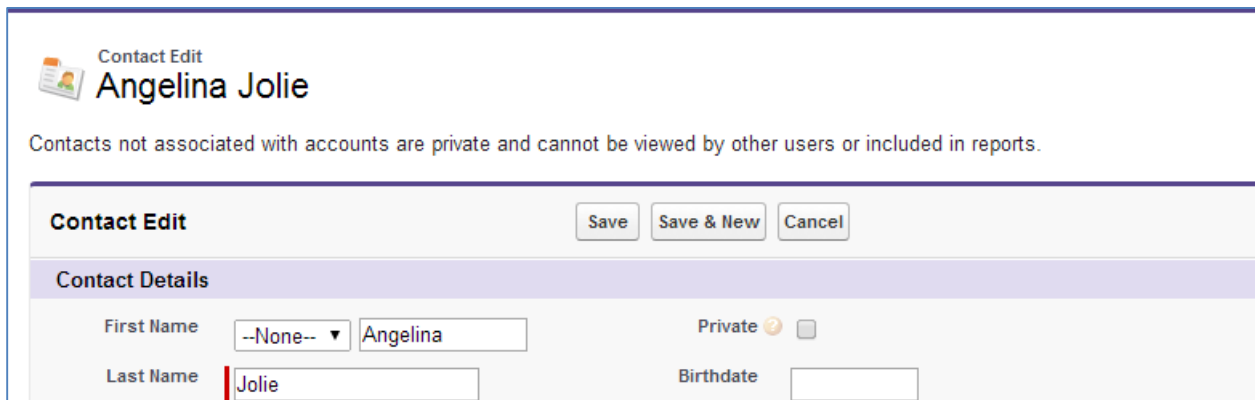
## ENTERING DONATIONS

### Exercise 1: Create an Individual Donation

- 1) Angelina makes a donation
  1. Look up “Jolie” in Search and call up her record



Search for **Jolie\*** (starts with)



Contact Edit  
**Angelina Jolie**

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

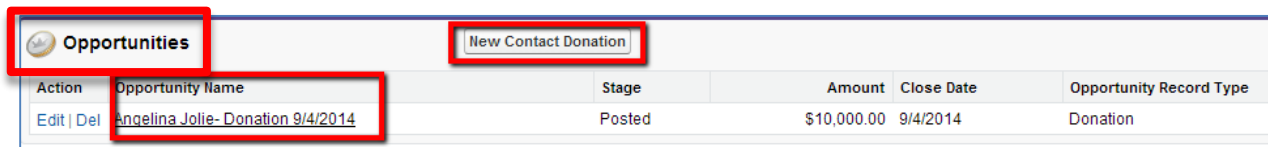
**Contact Edit** Save Save & New Cancel

**Contact Details**

First Name --None-- Angelina Private

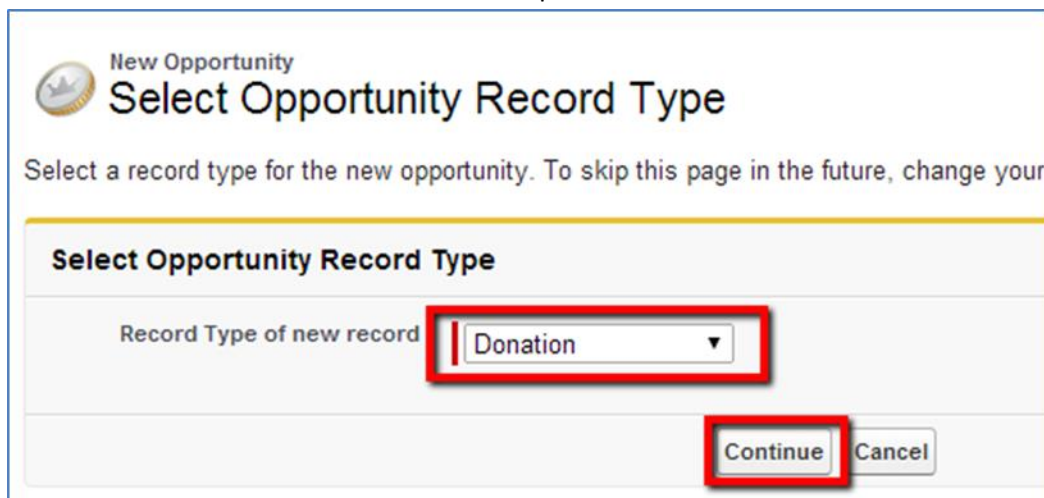
Last Name Jolie Birthdate

2. Under “Opportunities,” click “New Contact Donation”



Action	Opportunity Name	Stage	Amount	Close Date	Opportunity Record Type
Edit   Del	Angelina Jolie- Donation 9/4/2014	Posted	\$10,000.00	9/4/2014	Donation

3. Choose Donation from the drop-down and click “Continue”



New Opportunity  
**Select Opportunity Record Type**

Select a record type for the new opportunity. To skip this page in the future, change your

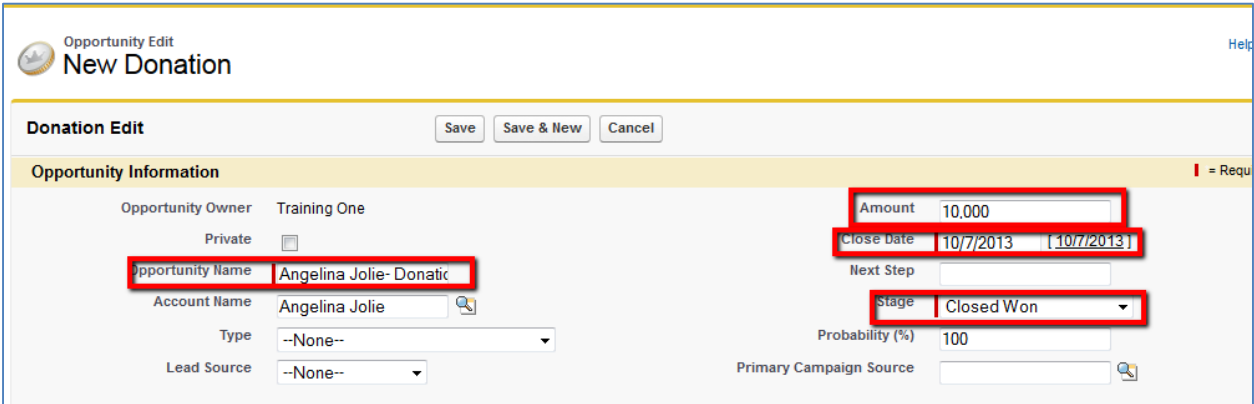
**Select Opportunity Record Type**

Record Type of new record **Donation**

Continue Cancel

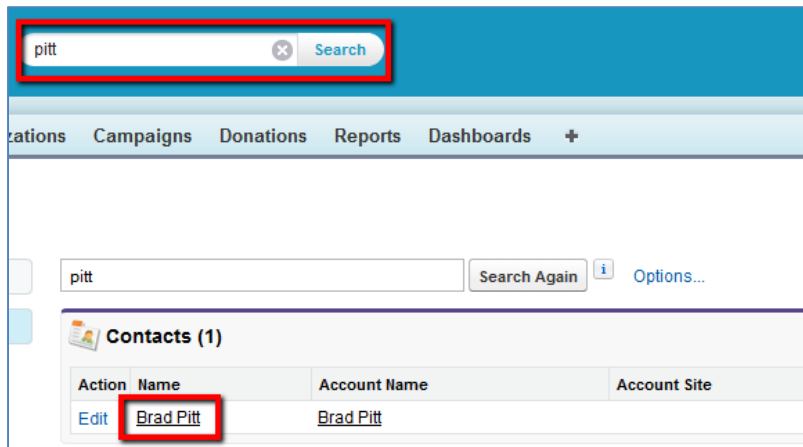


4. Opportunity Name will automatically populate with Name-Donation-Date
5. Enter Amount -\$10,000
6. Close Date = Today
7. Stage = Closed Won

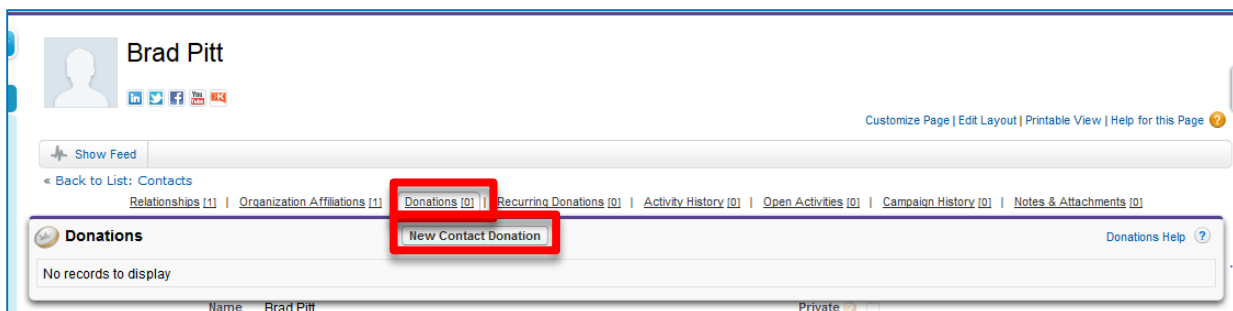


2) Brad makes a donation

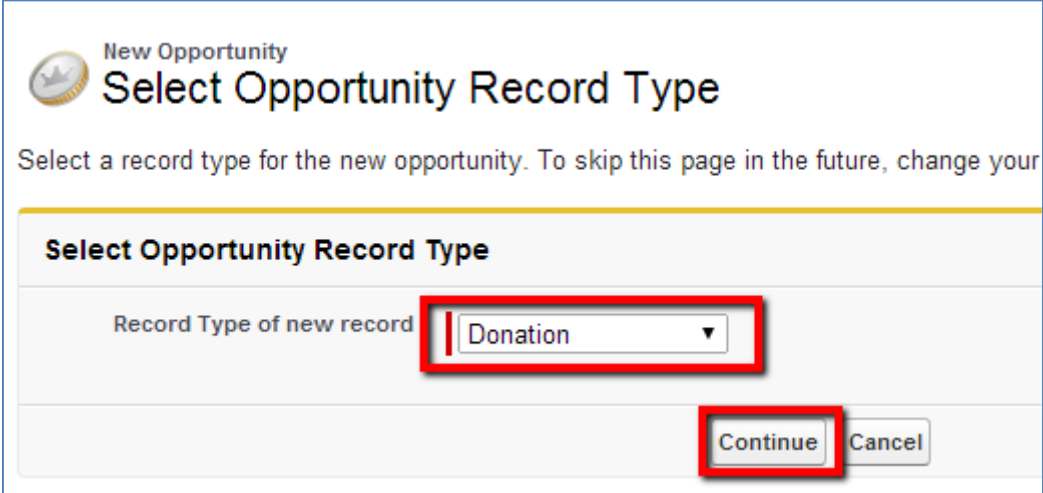
1. Look up "Pitt" in Search and call up his record



2. Hover over "Donations" link and choose "New Contact Donation"




3. Choose "Donation" in Dropdown menu



New Opportunity  
Select Opportunity Record Type

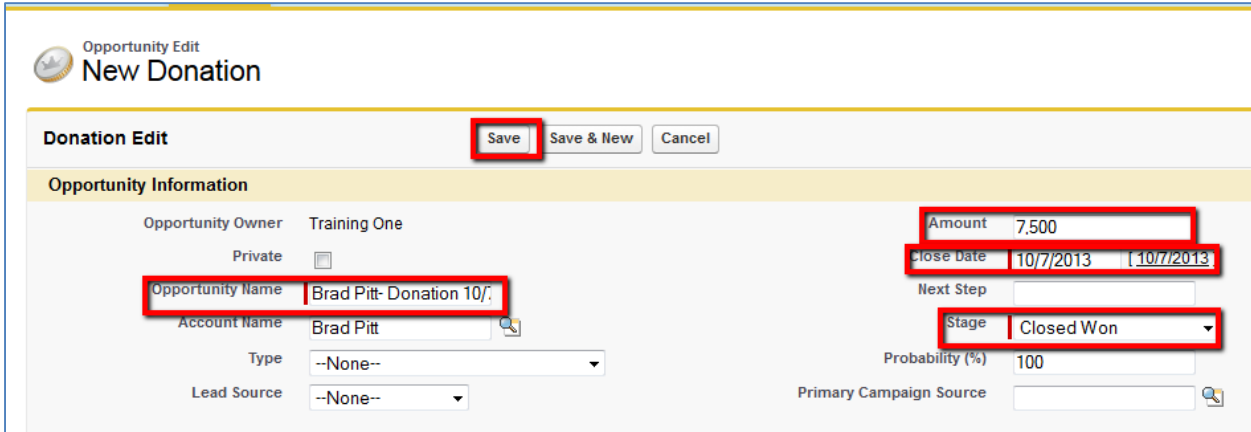
Select a record type for the new opportunity. To skip this page in the future, change your

Select Opportunity Record Type

Record Type of new record | Donation

Continue Cancel

4. Opportunity Name will automatically populate
5. Enter Amount -\$7,500 and "Close Date" as today
6. Stage = Closed Won
7. "Save"



Opportunity Edit  
New Donation

Donation Edit | Save | Save & New | Cancel

Opportunity Information

Opportunity Owner: Training One  
Private:   
Opportunity Name: Brad Pitt- Donation 10/  
Account Name: Brad Pitt  
Type: --None--  
Lead Source: --None--

Amount: 7,500  
Close Date: 10/7/2013 | 10/7/2013  
Next Step:  
Stage: Closed Won  
Probability (%): 100  
Primary Campaign Source:

- 3) Check Jolie & Pitt Household to see how the both donations are reflected
  1. Look up Jolie & Pitt Household in Search
  2. Their household record should look like this:

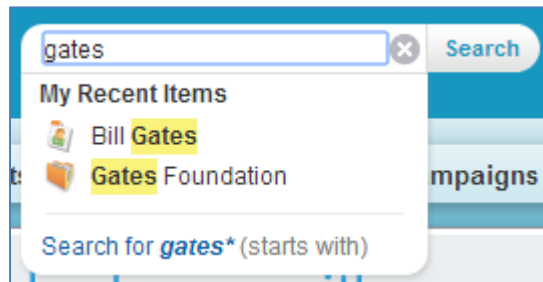
Account Detail		<input type="button" value="Edit"/> <input type="button" value="Delete"/>	
Account Name	Pitt and Jolie Household <a href="#">View Hierarchy</a>	Phone	
Primary Contact	<a href="#">Brad Pitt</a>	Number of Household Members	2
Formal Greeting	Brad Pitt and Angelina Jolie	Batch	
Informal Greeting	Brad and Angelina		
▼ Address			
Billing Address		Shipping Address	
▼ Description			
Description			
▼ Donation Information			
First Gift Date	9/4/2014	Last Gift Amount	\$7,500.00
Last Gift Date	9/4/2014	Largest Gift	\$10,000.00
Average Gift	\$8,750.00	Smallest Gift	\$7,500.00
Best Gift Year	2014	Best Gift Year Total	\$17,500.00
▼ Donation Totals			
Total Gifts	\$17,500.00	Total Number of Gifts	2
Total Gifts Last N Days	\$17,500.00	Number of Gifts Last N Days	2
Total Gifts This Year	\$17,500.00	Number of Gifts This Year	2
Total Gifts Last Year	\$0.00	Number of Gifts Last Year	0
Total Gifts Two Years Ago	\$0.00	Number of Gifts Two Years Ago	0

Now try your own! Enter a donation from the one of the contacts in the household you created.

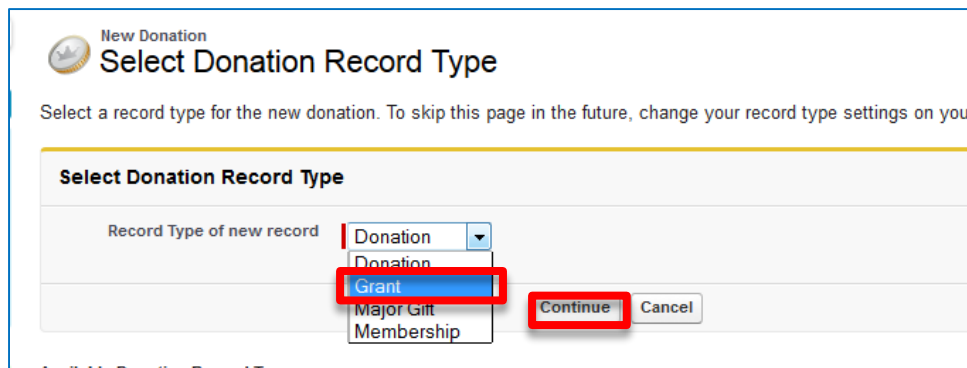


## RECORDING A GRANT

1. Look up “Gates” in Search and choose “Gates Foundation” record.



2. Hover over “Donations” link and click on “New Account Donation”
3. Choose “Grant” from the drop-down menu click “Continue”



4. Enter the name of the donation- “Gates Capacity Building Grant- 10/7/13”
5. Enter “Amount” \$50,000 and “Close Date” 10/7/13
6. Mark Stage as “Closed Won”
7. Click “Save”

Now try your own! Have the organization you created give a donation of \$10,000.





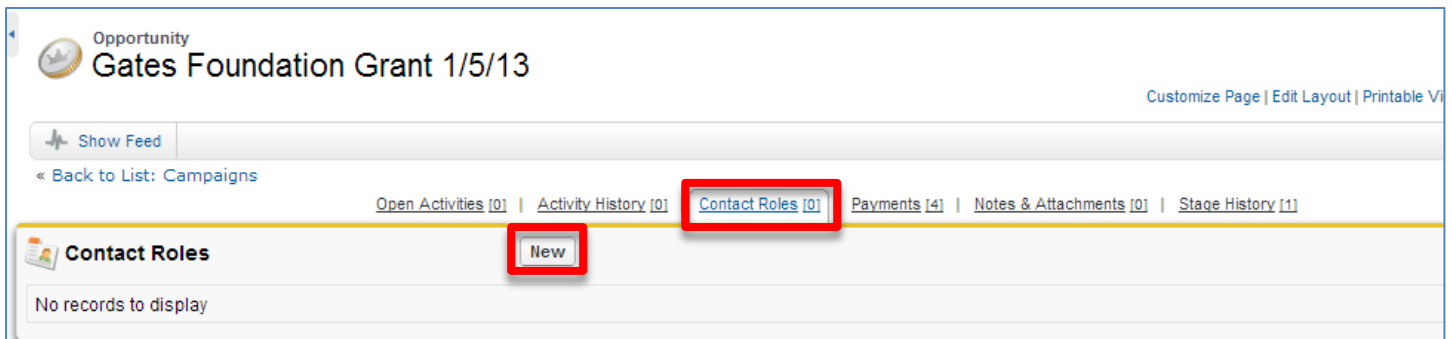
**Important Note on Crediting Donations:**

- Donations will be assigned to whichever type of contact is chosen (e.g., Organizational Contact will go to Organization and Individual Contact will go to individual.)
- If you have a contact that is both Individual and has an Affiliation with an Organization, make sure to choose which record should be credited with the donation (by default, the individual will be credited).

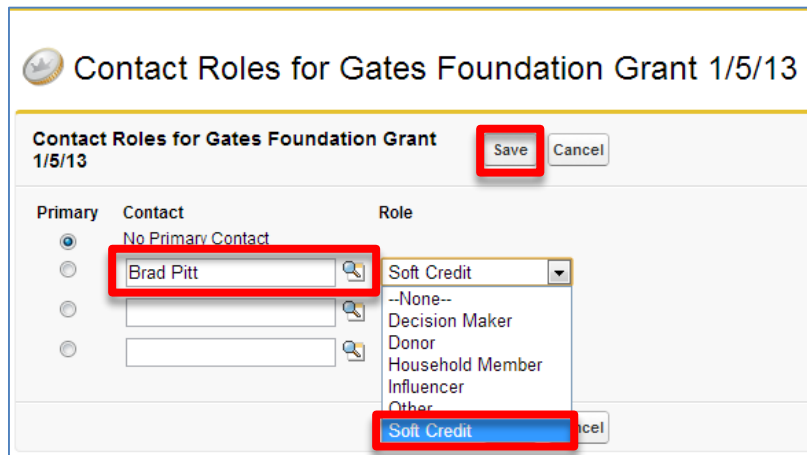
**Give Soft Credit**

Scenario: Give Brad Pitt soft credit for the \$200,000 Gates Foundation grant

- Go into the Opportunity record for the grant
- Hover over “Contact Roles” and select “New”



- Use the Lookup to find Brad Pitt’s record
- For Role, choose “Soft Credit”
- Click “Save”



- Brad Pitt will be listed on the Opportunity Record as having a Soft Credit Role

Opportunity  
Gates Foundation Grant 1/5/13

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Back to List: Campaigns

Open Activities (0) | Activity History (0) | **Contact Roles (1)** | Payments (4) | Notes & Attachments (0) | Stage History (1)

**Contact Roles** New Contact Roles Help

Action	Contact Name	Account Name	Email	Phone	Role	Primary
Edit   Del	<a href="#">Brad Pitt</a>	<a href="#">Brad Pitt</a>			Soft Credit	<input type="checkbox"/>

Account Name: Gates Foundation | Primary Campaign Source

- The Soft Credit will also be captured in Brad Pitt's contact record as an Opportunity

Brad Pitt

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Back to List: Campaigns

Relationships (0) | Organization Affiliations (0) | **Opportunities (1)** | Recurring Donations (0) | Activity History (0) | Volunteer Hours (0) | Open Activities (0) | Campaign History (0) | Notes & Attachments (0)

**Opportunities** New Contact Donation Opportunities Help

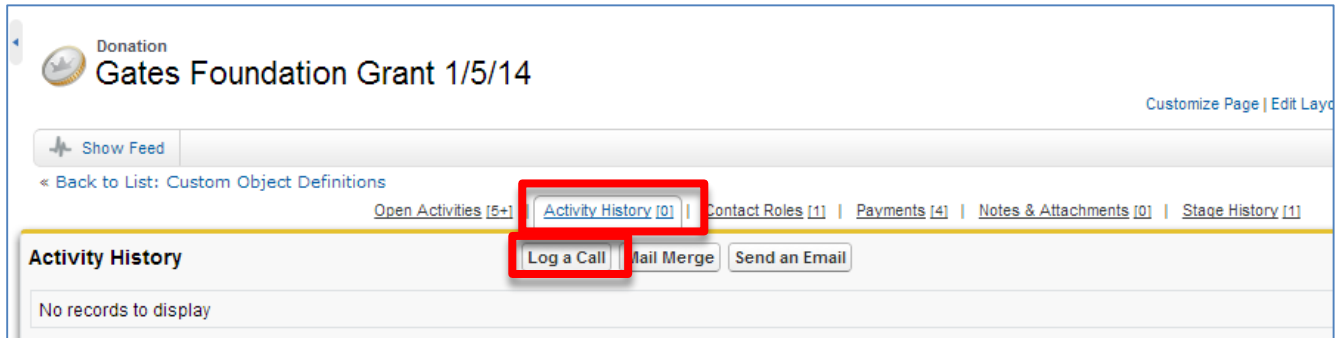
Action	Opportunity Name	Stage	Amount	Close Date
Edit   Del	<a href="#">Gates Foundation Grant 1/5/13</a>	Pledged	\$200,000.00	1/5/2014



## ACTIVITIES: LOGGING CALLS & CREATING RECURRING TASKS

### Exercise 1: Log a call with a Funder

- Go to the appropriate record (If the call is related to a specific opportunity, go to the opportunity record. If it is related generically to a funder, go to the account record)
- Hover over “Activity History” and click “Log a Call”



Donation  
Gates Foundation Grant 1/5/14

Customize Page | Edit Layout

Show Feed

« Back to List: Custom Object Definitions

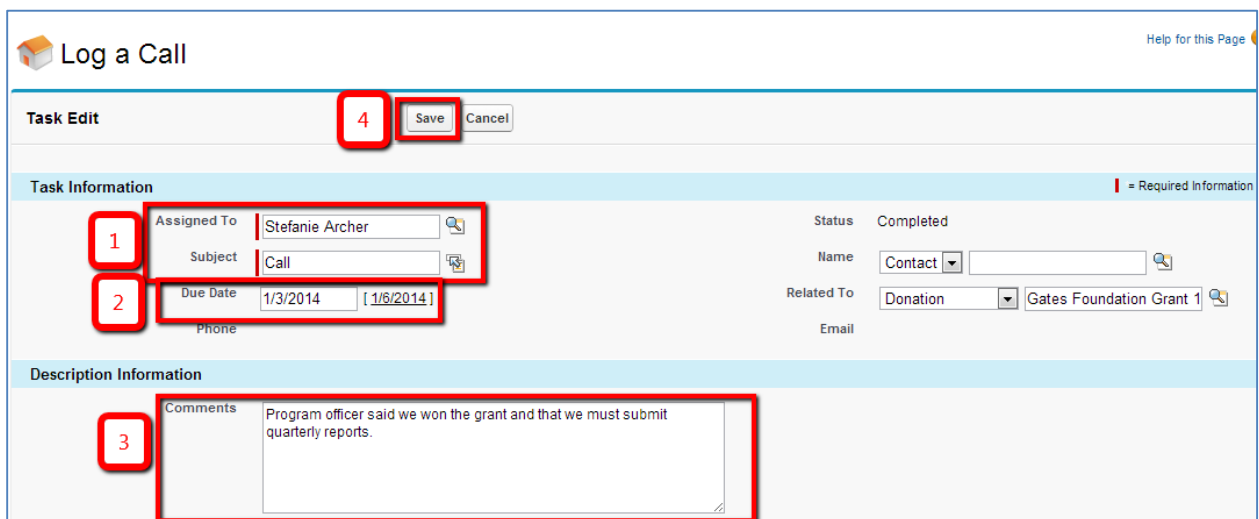
Open Activities [5+] | **Activity History [0]** | Contact Roles [1] | Payments [4] | Notes & Attachments [0] | Stage History [1]

**Activity History**

Log a Call | Mail Merge | Send an Email

No records to display

- 1) Your name and the subject “Call” will be automatically populated
- 2) Select the date of the call for the due date
- 3) Enter the specifics of the conversation in the Comments section
- 4) Click “Save” and the call will be saved to the appropriate record



Log a Call

Help for this Page

**Task Edit** 4 Save Cancel

**Task Information** | = Required Information

Assigned To: Stefanie Archer

Subject: Call

Due Date: 1/3/2014 [1/6/2014]

Status: Completed

Name: Contact

Related To: Donation Gates Foundation Grant 1

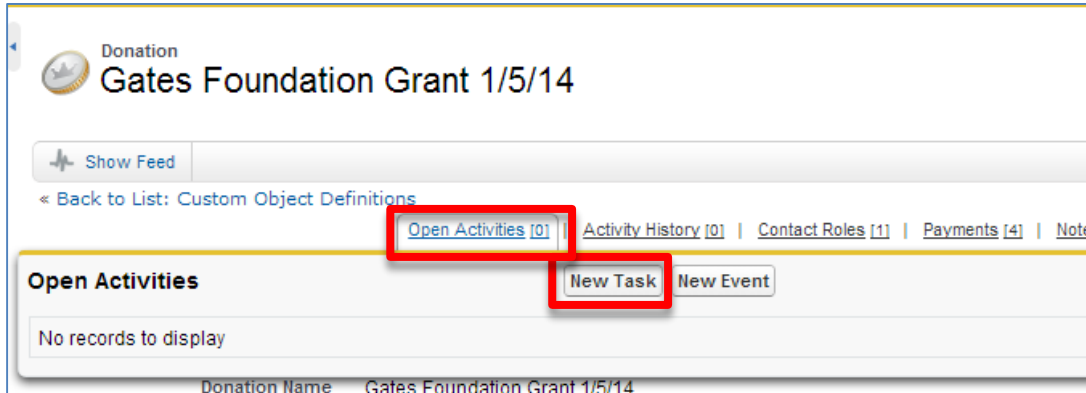
Email:

**Description Information**

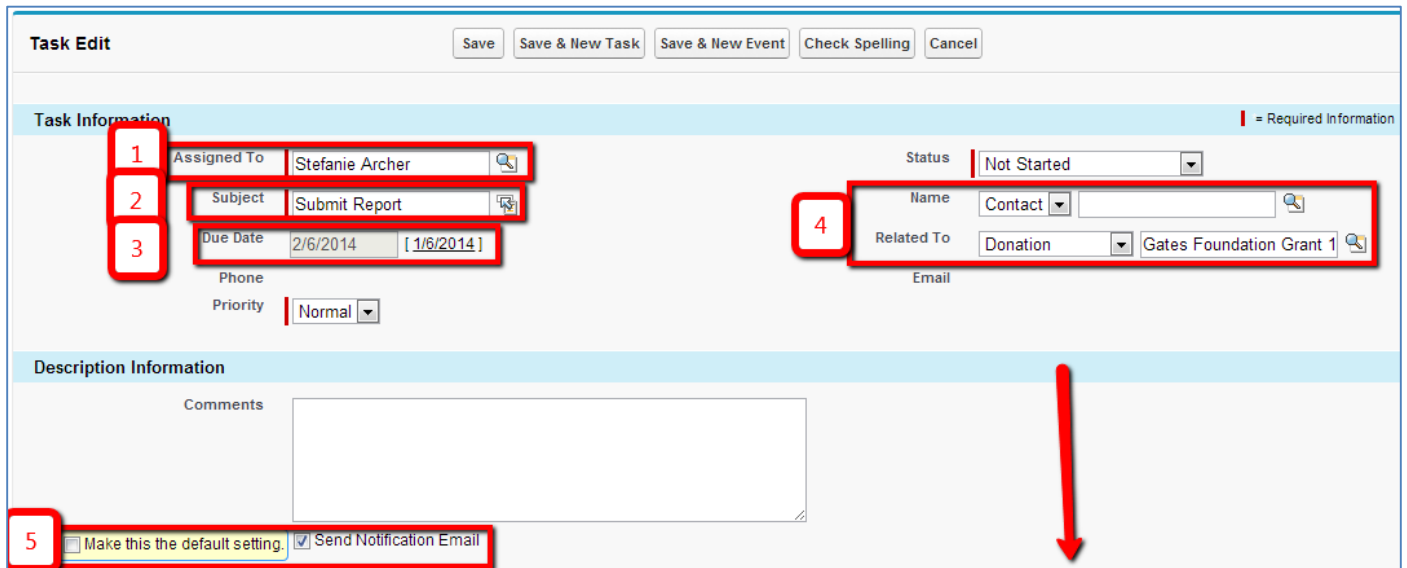
Comments: Program officer said we won the grant and that we must submit quarterly reports.

Exercise 2: Set up a task and reminder to submit a quarterly donor report  
 Go to the Opportunity record associated with the task (e.g., “Gates Grant”)

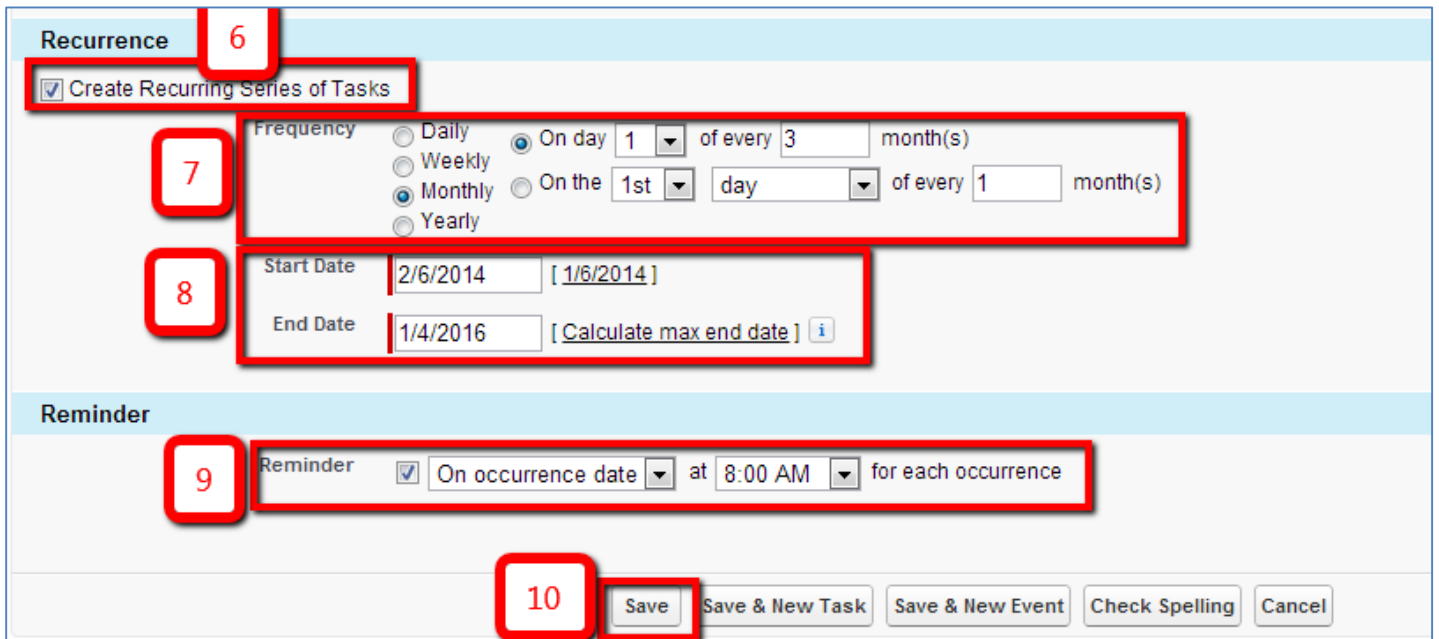
- Hover over “Open Activities” and click “New Task”



- 1) The task will automatically be assigned to the logged in user. If you want to reassign it to another Salesforce user, you can use the lookup icon.
- 2) For Subject, enter task name
- 3) Enter the due date for the first report
- 4) The opportunity will be automatically populated by going through the opportunity record. You may also specify an individual contact (e.g. program officer) if desired
- 5) Select “Send Notification Email” (and you may make this a default setting if desired)  
 Scroll down to add the recurring schedule



- 6) Check the box for “Create Recurring Series of Tasks”
- 7) Specify the frequency and when to be reminded (e.g. Monthly, on the 1st day of every 3 months)
- 8) Select the Start and End Date
- 9) Specify the reminder date (you can choose on the date, or a specific time before/after the date)
- 10) Click “Save”



**Recurrence**

Create Recurring Series of Tasks

Frequency:  Daily  On day 1 of every 3 month(s)  Weekly  Monthly  On the 1st day of every 1 month(s)  Yearly

Start Date: 2/6/2014 [ 1/6/2014 ]

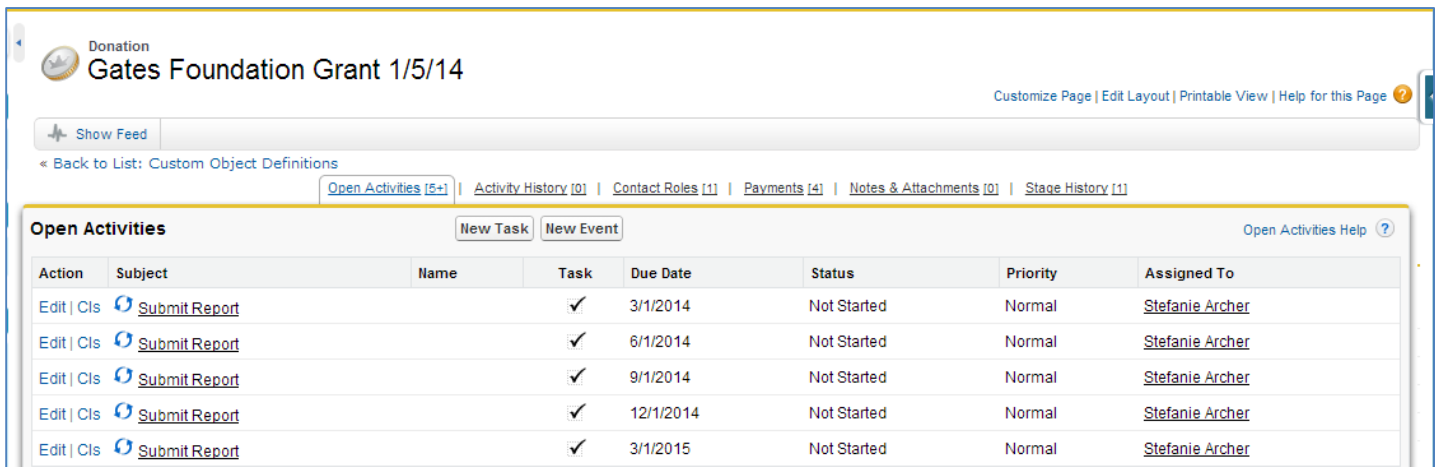
End Date: 1/4/2016 [ Calculate max end date ]

**Reminder**

Reminder  On occurrence date at 8:00 AM for each occurrence

Save Save & New Task Save & New Event Check Spelling Cancel

- The tasks will automatically be added to the Opportunity record and a reminder will be sent at the date/time specified



Donation Gates Foundation Grant 1/5/14

Open Activities [5+] | Activity History [0] | Contact Roles [1] | Payments [4] | Notes & Attachments [0] | Stage History [1]

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit   Cls	<a href="#">Submit Report</a>		✓	3/1/2014	Not Started	Normal	<a href="#">Stefanie Archer</a>
Edit   Cls	<a href="#">Submit Report</a>		✓	6/1/2014	Not Started	Normal	<a href="#">Stefanie Archer</a>
Edit   Cls	<a href="#">Submit Report</a>		✓	9/1/2014	Not Started	Normal	<a href="#">Stefanie Archer</a>
Edit   Cls	<a href="#">Submit Report</a>		✓	12/1/2014	Not Started	Normal	<a href="#">Stefanie Archer</a>
Edit   Cls	<a href="#">Submit Report</a>		✓	3/1/2015	Not Started	Normal	<a href="#">Stefanie Archer</a>



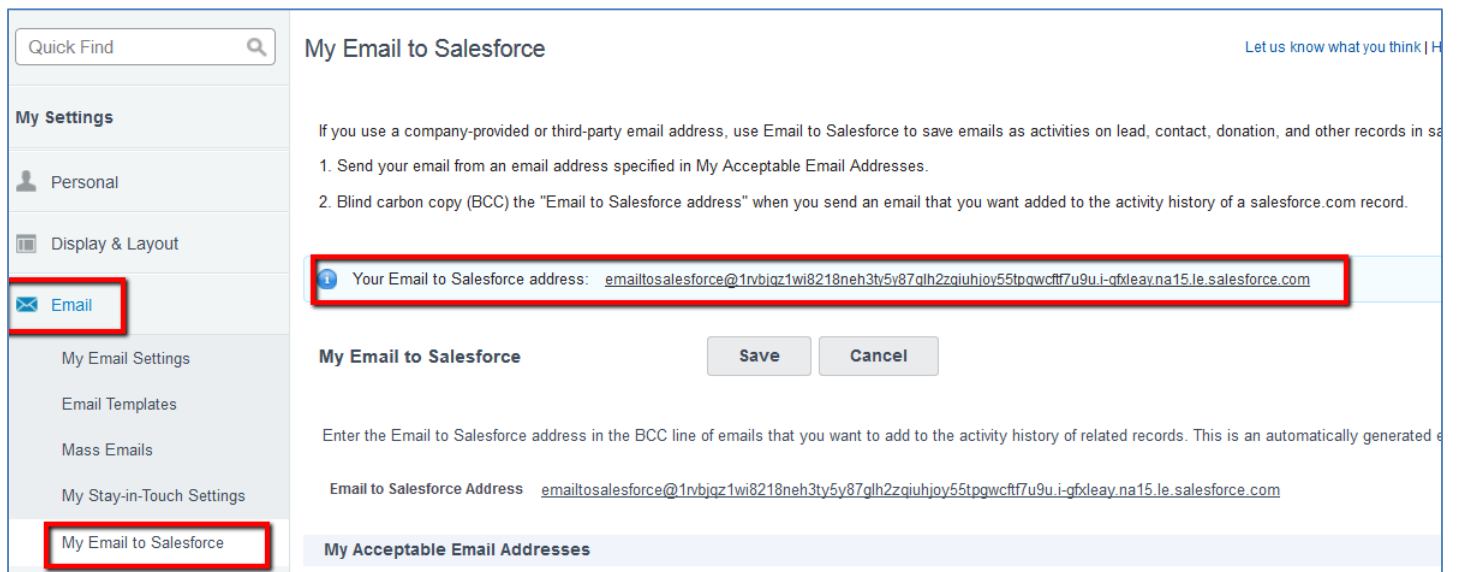
## Email directly into Salesforce using your unique BCC: email

1. Go into User Name → My Settings



2. Choose Email → My Email to Salesforce

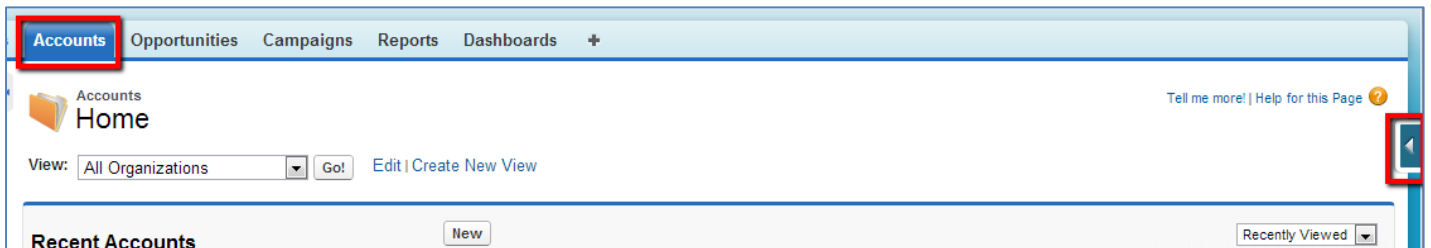
The email address listed in this page is your unique email. Use this address in the BCC: field of an email that you want to attach to a contact, and it will automatically attach to the contact record connected to the recipients email address.

A screenshot of the 'My Email to Salesforce' settings page in Salesforce. The left sidebar shows 'My Settings' with categories: Personal, Display & Layout, Email (highlighted with a red box), My Email Settings, Email Templates, Mass Emails, My Stay-in-Touch Settings, and My Email to Salesforce (highlighted with a red box). The main content area is titled 'My Email to Salesforce' and contains instructions: 'If you use a company-provided or third-party email address, use Email to Salesforce to save emails as activities on lead, contact, donation, and other records in Salesforce.' It lists two steps: 1. Send your email from an email address specified in My Acceptable Email Addresses. 2. Blind carbon copy (BCC) the "Email to Salesforce address" when you send an email that you want added to the activity history of a salesforce.com record. Below the instructions, a text field displays the unique email address: 'Your Email to Salesforce address: emailtosalesforce@1rvbjqz1wi8218neh3ty5v87qlh2zqihjoy55tpqwcftf7u9u-i-gfxleay.na15.le.salesforce.com' (highlighted with a red box). Below this field are 'Save' and 'Cancel' buttons. At the bottom, there is a section for 'My Acceptable Email Addresses'.

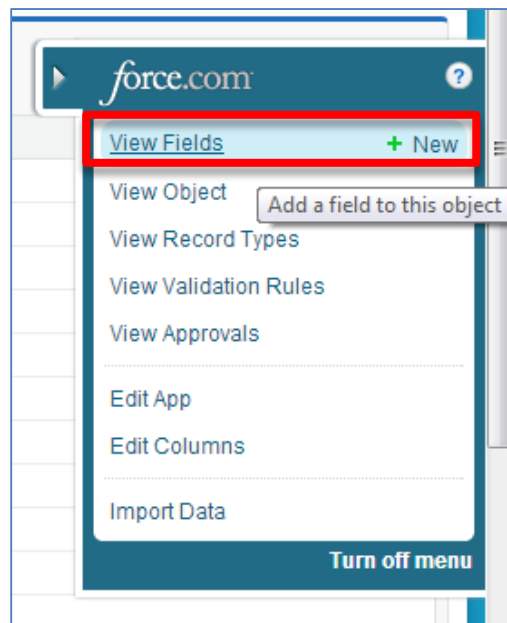
## CUSTOMIZING SALESFORCE

Exercise 1: Create a Custom Field on Account record for “Relationship Type”

- Go to the “Account” tab
- Click on the little blue triangle on the right (Note: This triangle is called the “Quick Access Menu” allows for easy edits to fields and page layouts)



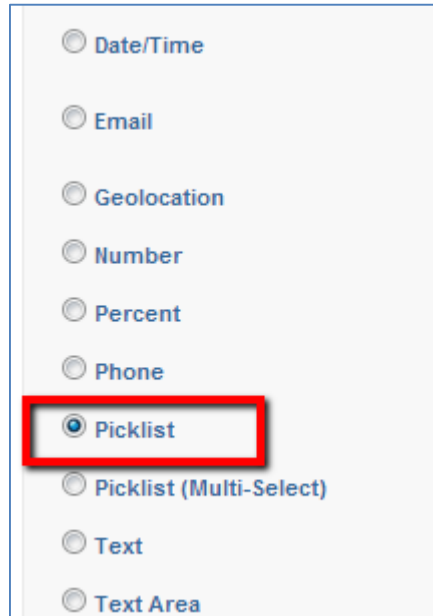
- Hover over “View Fields” and click “+ New”



- Select the Data Type
- For this field, we will choose “Picklist”




- Click “Next” (in the lower right corner of the page)



A vertical list of field types with radio buttons. The 'Picklist' option is selected and highlighted with a red box. The other options are: Date/Time, Email, Geolocation, Number, Percent, Phone, Picklist (Multi-Select), Text, and Text Area.

Field Label: Relationship Type

- Enter each relationship type on a new line: Foundation, Partner, Media, Vendor
- Click “Next”



The screenshot shows the 'New Custom Field' setup page in Salesforce. The 'Field Label' is 'Relationship Type'. The 'Picklist' values are 'Foundation', 'Partner', 'Media', and 'Vendor'. The 'Next' button is highlighted with a red box. The page is titled 'Step 2. Enter the details' and 'Step 2 of 4'.

- Select the proper field-level security, which specifies who can edit (“Visible”) vs Read-Only
- Keep the default of Visible to every user profile
- Click “Next”





Step 3. Establish field-level security Step 3 of 4

Previous **Next** Cancel

Field Label Relationship Type  
Data Type Picklist  
Field Name Relationship\_Type  
Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input checked="" type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Executive Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Fundraising and Development	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Office Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Office Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Program Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Specify which Page Layout this field should be added to (The default will be to add the field to both Household Layout and Organization Layout)
- Click “Save”

Account Help for this s

### New Custom Field

Step 4. Add to page layouts Step

Previous Save & New Save

Field Label Relationship Type  
Data Type Picklist  
Field Name Relationship\_Type  
Description

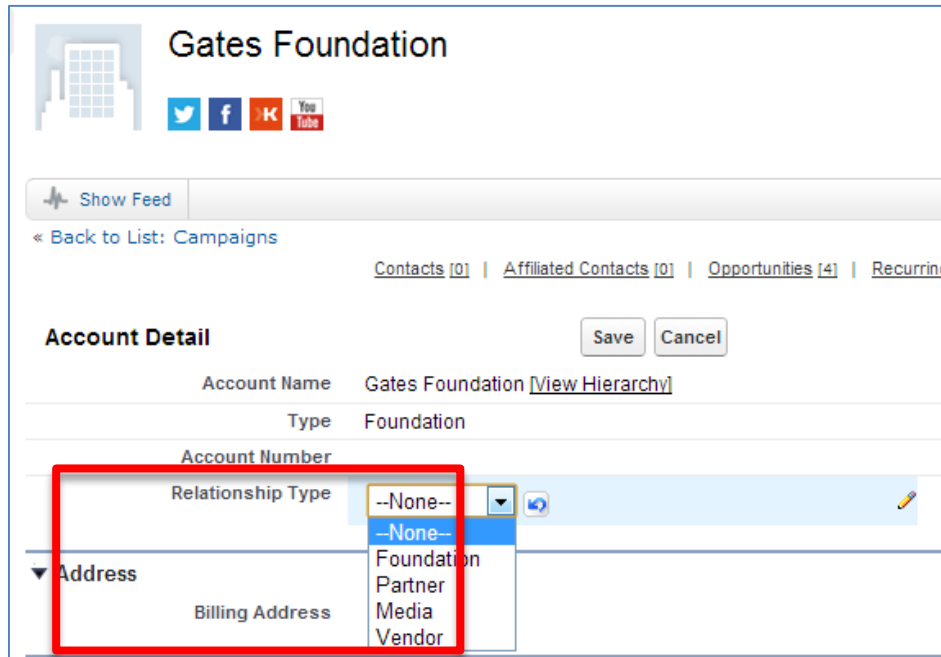
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout. To change the values that appear, you will need to customize the Record Type

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Household Layout
<input checked="" type="checkbox"/>	Organization Layout

- To see your changes, go into the “Gates Foundation” Account record and find your new field

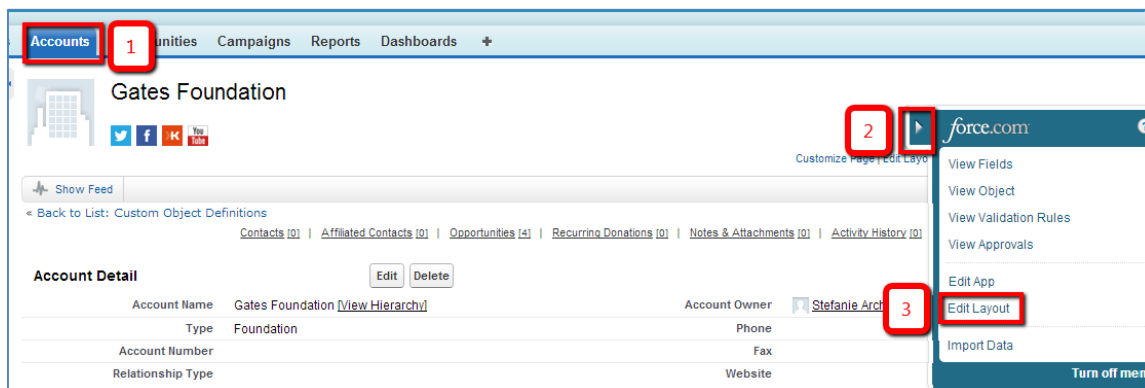




## Edit Page Layouts

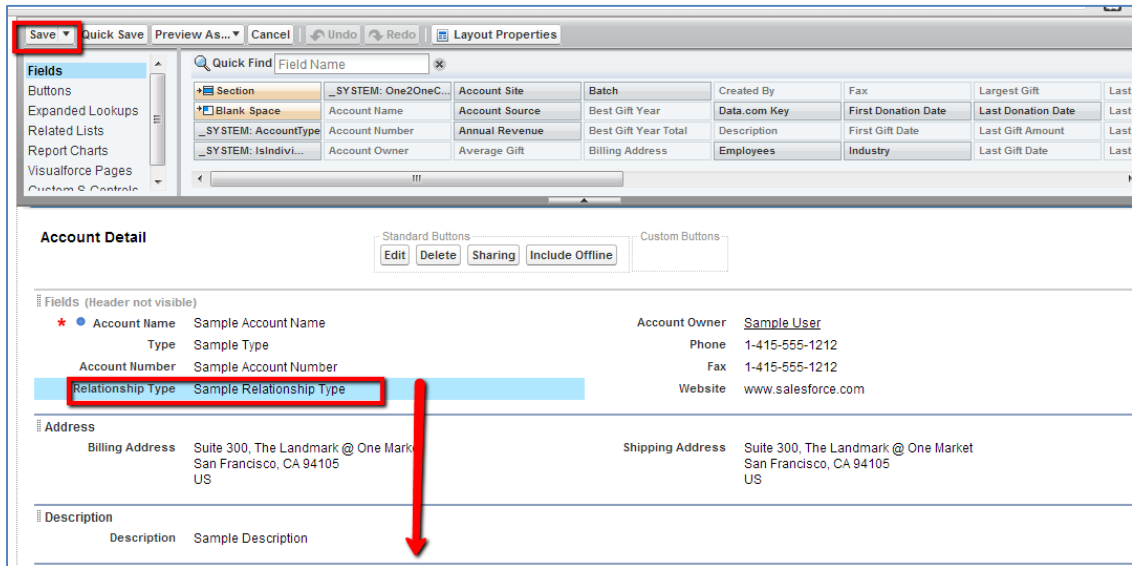
### 2.1 Move "Relationship Type" to a different location on the page

1. Click on the Accounts tab and open up a record (the Gates Foundation)
2. Click on the blue triangle on the right open the Quick Access Menu
3. Click on "Edit Layout"



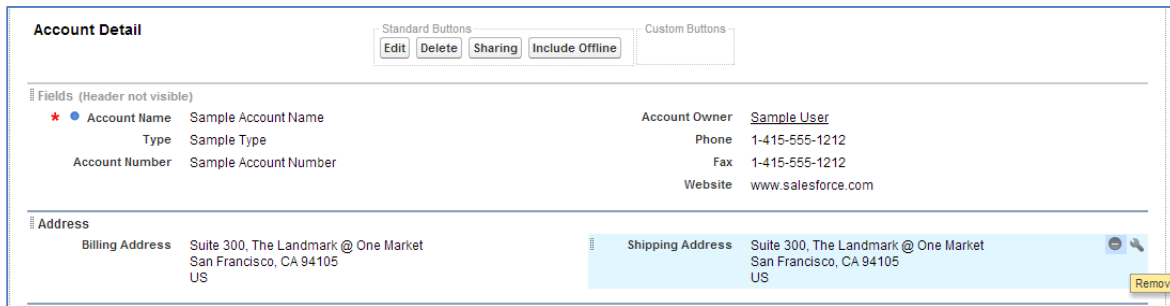
- Click and hold on the "Relationship Type" field and drag and drop it in the Description section





## 2.2 Remove “Shipping Address” from the Page Layout

- Hover over the Shipping Address field and click the “-” icon

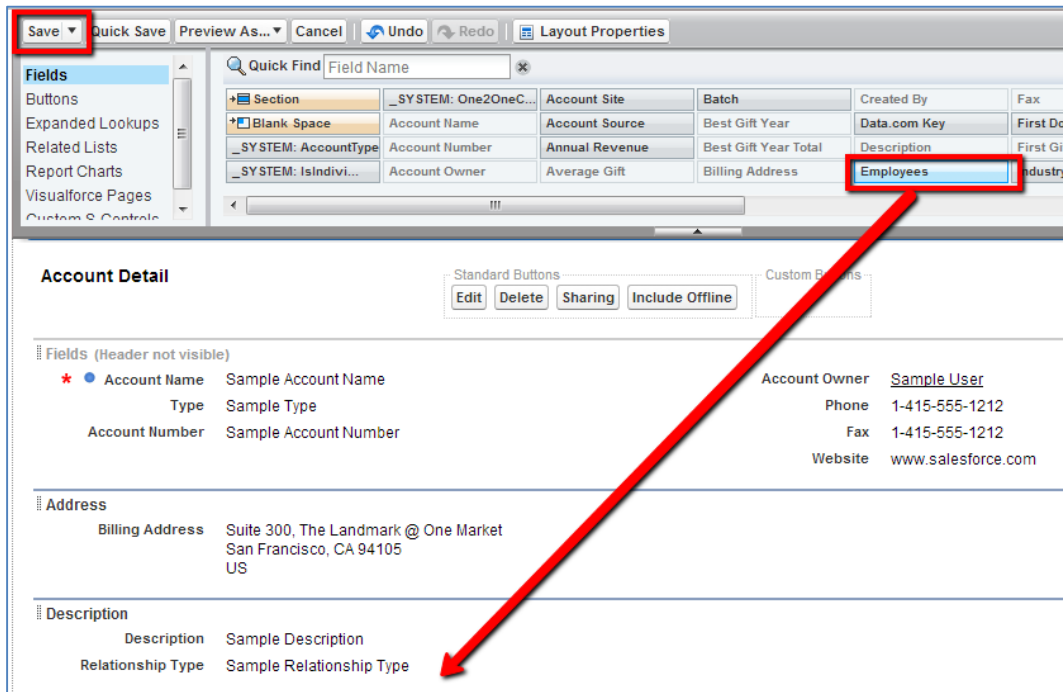


## 2.3 Add the “Employees” field to the “Description” section

- Click and hold the “Employees” field in the top box
- Drag and drop it into the “Description” section

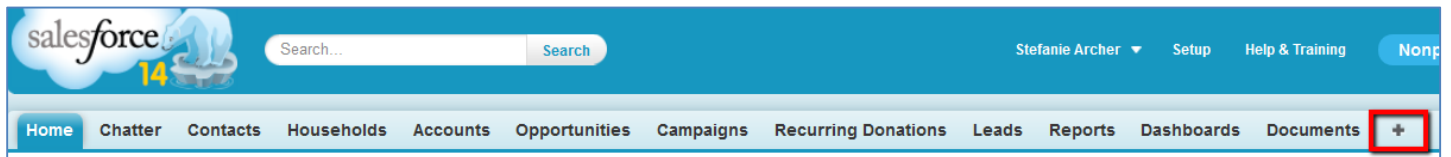


- Click "Save"

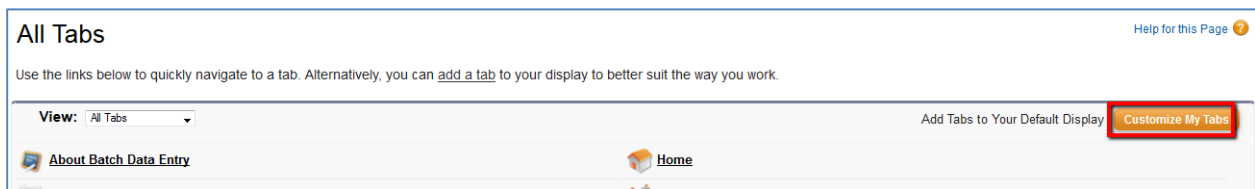


## Customize Tabs

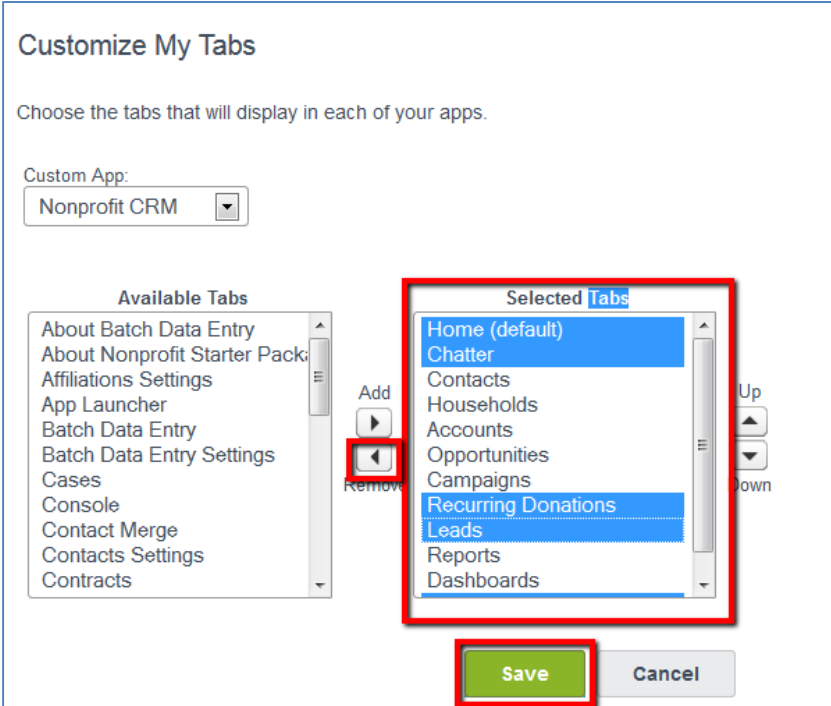
- 1) Click on the "+" sign at the end of the tabs



- 2) Choose the button "Customize My Tabs"

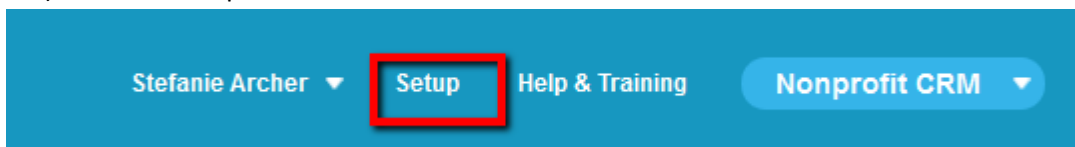


- 3) Select the following tabs to remove: Home, Chatter, Recurring Donations, Leads, and Documents  
Click “Save”

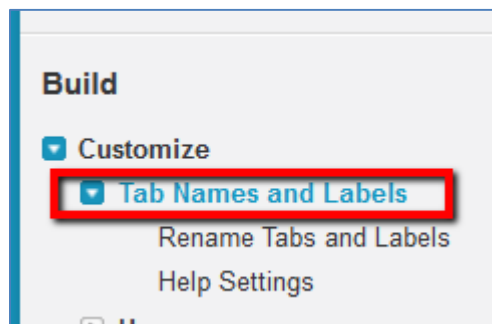


## Rename “Account” and “Opportunity” Tabs

- 1) Go into Setup



- 2) Choose Build → Customize → Tab Names and Labels



- 3) Click on “Customize application tab names and field labels”

## Tab Names and Labels

**Tab Names and Labels**

- Customize application tab names and field labels
- Customize application help links

- 4) Click “Edit” next to “Accounts”

## Rename Tabs and Labels

Make salesforce.com match your organization's terminology by renaming tab and field labels you choose. After renaming any tab or field label, remember to update all custom reports and reports with the new name.

Select Language

### Standard Tabs

Action	Tab Name	Display Label
Edit	Accounts	Accounts
Edit	Activities	Activities
Edit	Assets	Assets

- Rename “Account” to “Organization” and “Accounts” to “Organizations”



- Keep “Starts with a vowel” checkbox checked
- Click “Next”

**Rename Tabs and Labels** Help for this Page ?

Enter the new tab names and field labels to display in the selected language.

**Step 1. Enter the new tab names** Step 1 of 2

Save **Next** Cancel

Tab: Accounts  
Language: English

Singular	Organization	Example: Account
Plural	Organizations	Example: Accounts

Starts with vowel sound

Save Next Cancel

- Click “Save” to apply the new name to associated fields

**Rename Tabs and Labels** Help for this Page ?

Enter the new tab names and field labels to display in the selected language.

**Step 2. Enter the new field labels** Step 2 of 2

Previous **Save** Cancel

Please review all the auto-populated values below for grammatical accuracy. Edit any [standard field labels](#) and [other labels](#) for the selected tab and language.

Tab: Accounts  
Language: English

**Standard Field Labels** Other Labels

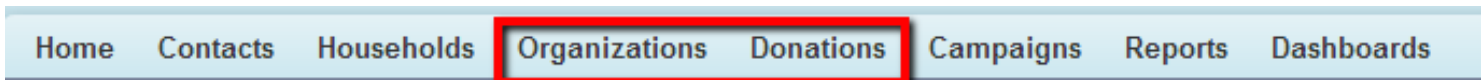
	Singular	Plural	Starts with vowel sound
Account Division	Organization Division		<input checked="" type="checkbox"/>
Account Name	Organization Name	Organization Names	<input checked="" type="checkbox"/>
Account Number	Organization Number		<input checked="" type="checkbox"/>
Account Owner	Organization Owner	Organization Owners	<input checked="" type="checkbox"/>
Account Site	Organization Site	Organization Sites	<input checked="" type="checkbox"/>



- Click “edit” next to “Opportunities” and repeat the process above to rename it to “Donations”

Standard Tabs		
Action	Tab Name	Display Label
Edit	Accounts	Accounts
Edit	Activities	Activities
Edit	Assets	Assets
Edit	Campaigns	Campaigns
Edit	Cases	Cases
Edit	Contacts	Contacts
Edit	Contracts	Contracts
Edit	Documents	Documents
Edit	Events	Events
Edit	Ideas	Ideas
Edit	Leads	Leads
Edit	Libraries	Libraries
Edit	Opportunities	Opportunities
Edit	Opportunity Products	Opportunity Products
Edit	Partners	Partners

Once you are finished, your changes will be reflected in the tabs in the menu bar:





## DATA BEST PRACTICES

### Prevent Duplicates

- Always search first
- There should only be one contact record for a person, no matter how many hats they wear

### Data Integrity

- Consistency counts
- Keep Data Current
- If it's not in Salesforce, it doesn't exist
- Garbage in, garbage out
- Save Every Time
- People entering data should be properly trained

### Record and Field Creation

- D.R.Y. – Don't Repeat Yourself
- Begin with the end in mind
- If changing a field, check for existing data first
- Don't put fields in Salesforce that you won't report on.

### Linking Records

- When entering donations, go through the donor's contact record
- When creating an organizational contact, go through the organization record



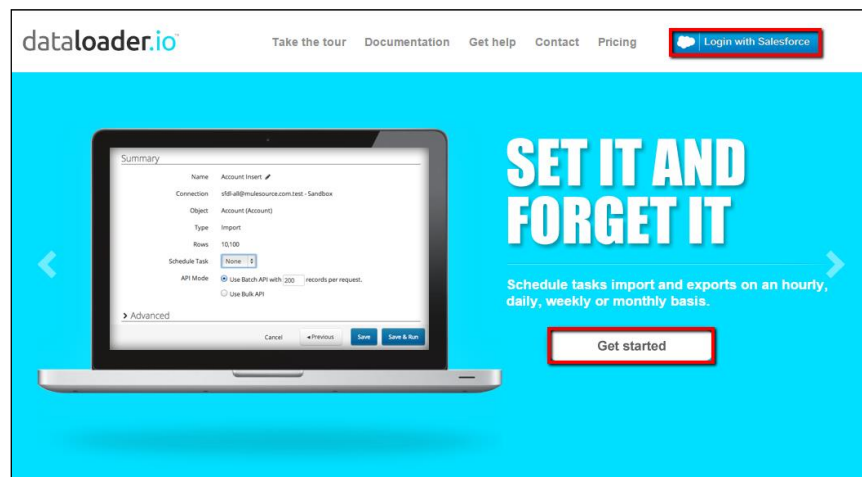
## MIGRATING CONTACT DATA TO SALESFORCE

“Data Migration” refers to the process of importing a large number of records into Salesforce. This is especially useful when you are transitioning from another data storage application. Migration requires an additional tool. In this manual we use an online tool called [DataLoader.io](http://DataLoader.io).

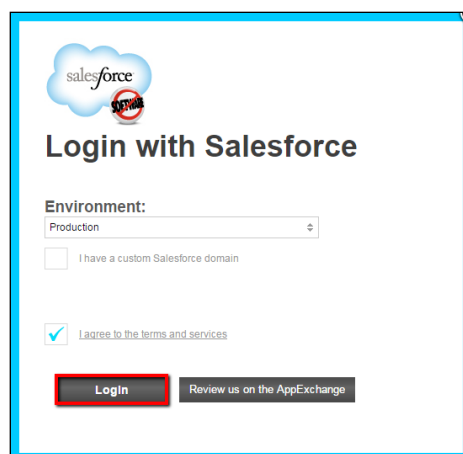
### Opening DataLoader.io

Open the Salesforce instance you want to work with

1. Open a new window in your browser. Type [www.dataloader.io](http://www.dataloader.io). The following window will open:



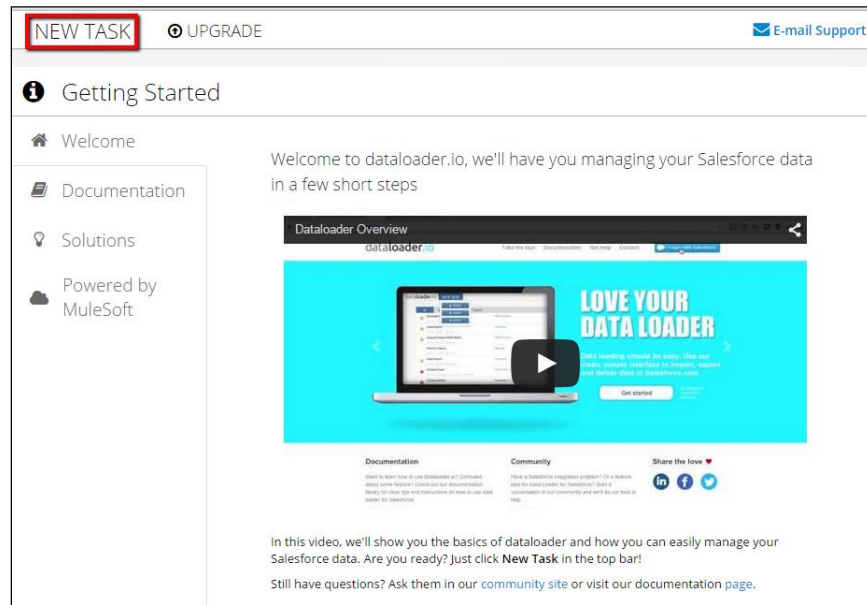
2. Click Login with Salesforce
3. DataLoader will ask permission to access your data. Click Allow



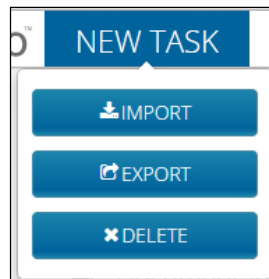
4. Click “Login”



- This screen will appear. Click “New Task”



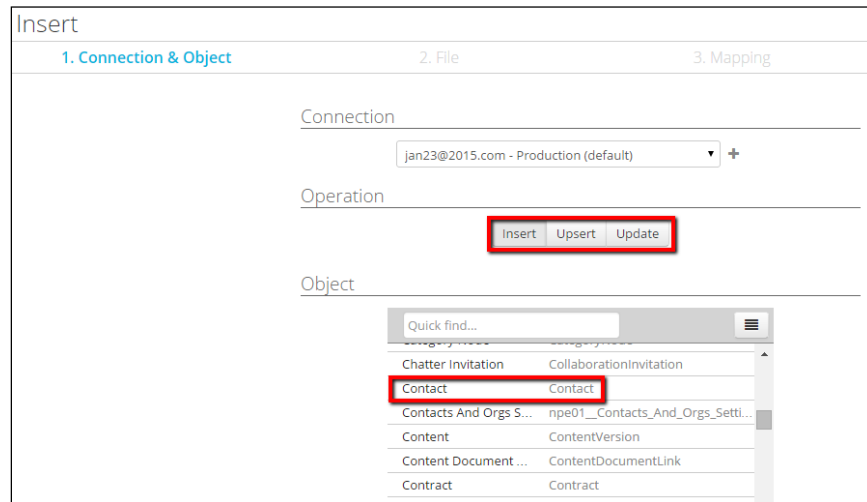
- Specify the task: Click “Import”



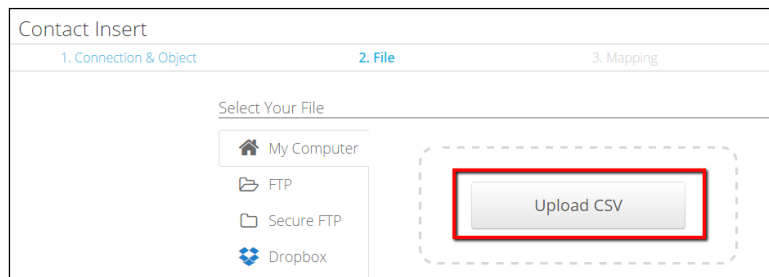
- When this screen appears, click “Insert”
- Dataloader.io and other tools permit three ways to import data.
  - Insert** = Load brand new data into Salesforce
  - Update** = Edit data that is currently in Salesforce
  - Upsert** = A combination of Insert and Update for data that contains some new records and some existing records



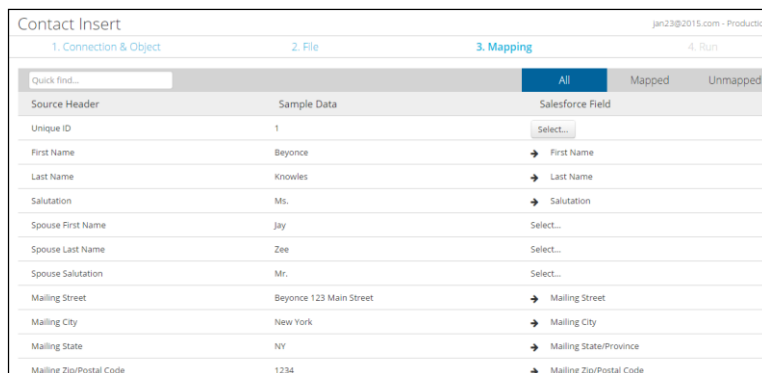
Select the Salesforce object into which you will be migrating the data (in this case, Contact)



10. Click “Upload CSV” and select the Excel CSV formatted file containing the desired data



11. Dataloader.io will map the fields from the csv file with the Salesforce fields, assuming they have the same names. **Make sure that you have created any necessary custom fields in Salesforce before you undertake this step**

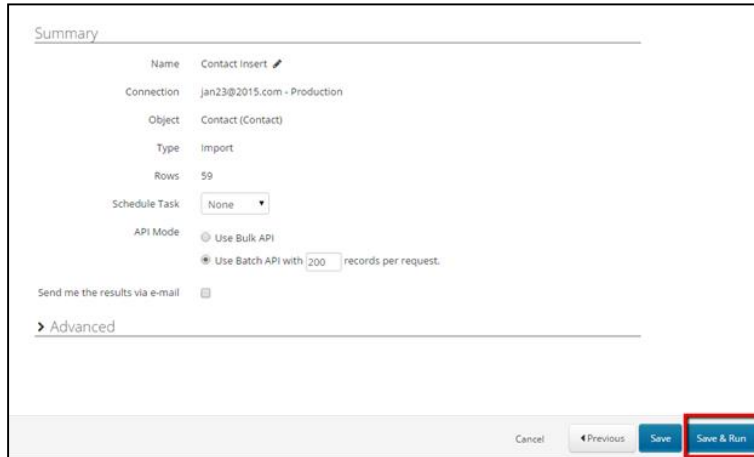


Source Header	Sample Data	Salesforce Field
Unique ID	1	Select...
First Name	Beyonce	→ First Name
Last Name	Knowles	→ Last Name
Salutation	Ms.	→ Salutation
Spouse First Name	Jay	Select...
Spouse Last Name	Zee	Select...
Spouse Salutation	Mr.	Select...
Mailing Street	Beyonce 123 Main Street	→ Mailing Street
Mailing City	New York	→ Mailing City
Mailing State	NY	→ Mailing State/Province
Mailing Zip/Postal Code	1234	→ Mailing Zip/Postal Code

12. Any fields that don’t match can be matched manually by using the “Select” button.



13. When all fields are mapped, click “Next”
14. Review the number of records in your spreadsheet to make sure it matches Dataloader.



Summary

Name: Contact Insert

Connection: jan23@2015.com - Production

Object: Contact (Contact)

Type: Import

Rows: 59

Schedule Task: None

API Mode:
 

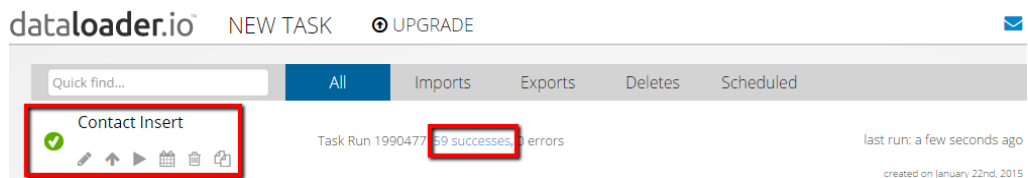
- Use Bulk API
- Use Batch API with 200 records per request.

Send me the results via e-mail:

> Advanced

Buttons: Cancel, < Previous, Save, **Save & Run**

15. Click Save and Run
16. Before the records are actually migrated, the Data Loader will give you a scary warning. Click Yes
17. When the Data Loader has finished, it will confirm that the Insert is successful (Green checkmark appears).
18. If it is not successful, it will show a red X
19. Click “View Successes” or “View Errors” To see a report on your data



dataloader.io™ NEW TASK Ⓢ UPGRADE

Quick find...

All Imports Exports Deletes Scheduled

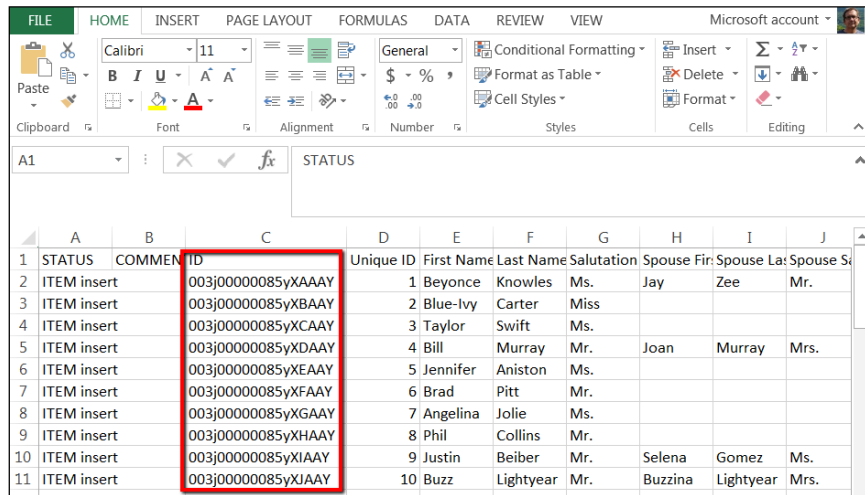
**Contact Insert** Task Run 1990477 **59 successes**, 0 errors

last run: a few seconds ago  
created on January 22nd, 2015

20. Save the resulting report as an Excel file. This report contains the newly created Salesforce Contact IDs for all the contacts you have just migrated.



21. These codes are useful for joining contacts in a household, affiliating them with a company, etc.



	A	B	C	D	E	F	G	H	I	J
1	STATUS	COMMENT	ID	Unique ID	First Name	Last Name	Salutation	Spouse Fir	Spouse La	Spouse S
2	ITEM insert		003j00000085yXAAAY	1	Beyonce	Knowles	Ms.	Jay	Zee	Mr.
3	ITEM insert		003j00000085yXBAAY	2	Blue-Ivy	Carter	Miss			
4	ITEM insert		003j00000085yXCAAY	3	Taylor	Swift	Ms.			
5	ITEM insert		003j00000085yXDAAY	4	Bill	Murray	Mr.	Joan	Murray	Mrs.
6	ITEM insert		003j00000085yXEAAAY	5	Jennifer	Aniston	Ms.			
7	ITEM insert		003j00000085yXFAAY	6	Brad	Pitt	Mr.			
8	ITEM insert		003j00000085yXGAAY	7	Angelina	Jolie	Ms.			
9	ITEM insert		003j00000085yXHAAY	8	Phil	Collins	Mr.			
10	ITEM insert		003j00000085yXIAAY	9	Justin	Beiber	Mr.	Selena	Gomez	Ms.
11	ITEM insert		003j00000085yXJAAY	10	Buzz	Lightyear	Mr.	Buzzina	Lightyear	Mrs.

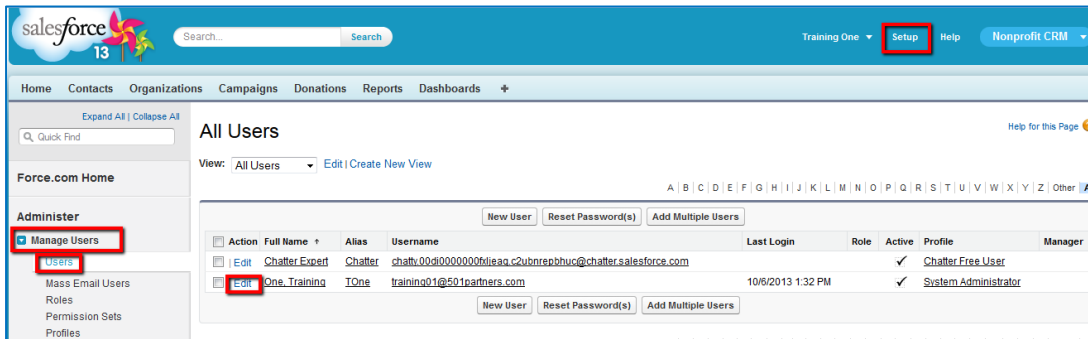


## CAMPAIGNS

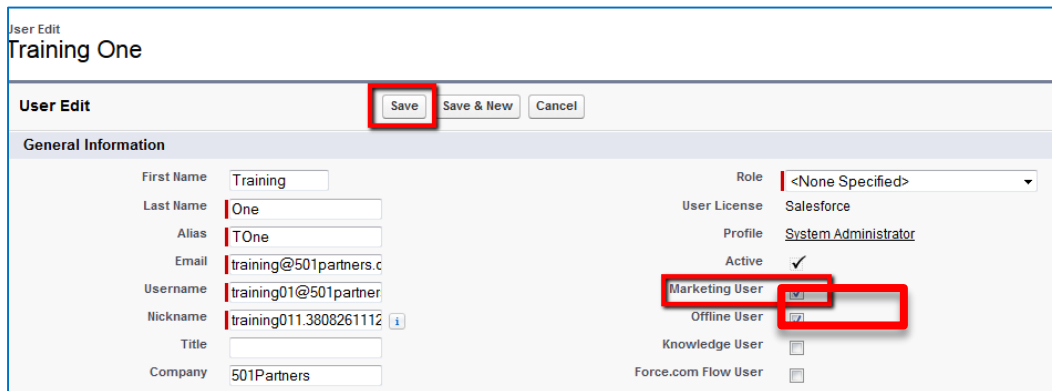
Set up special permissions to be a Marketing User

**Marketing User:** A permission setting that allows a user to create and edit Campaign records

1. Setup-> (Under the “Administrator” panel) Manage Users->Users
2. Find your user account (TrainingXX) and click “Edit”

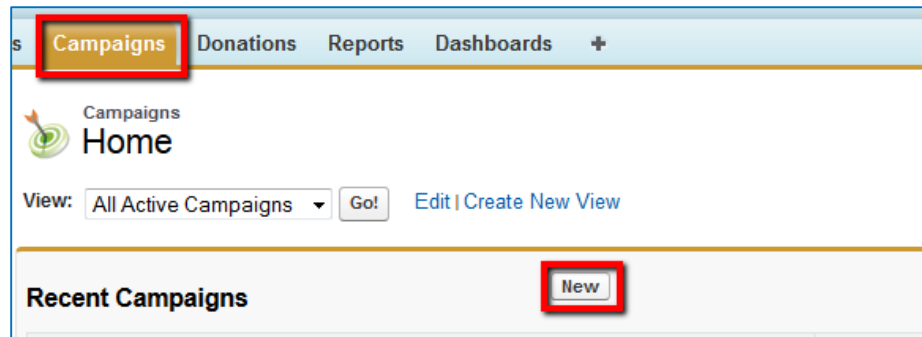


3. Make sure “Marketing User” and “Active” is checked and click “Save”

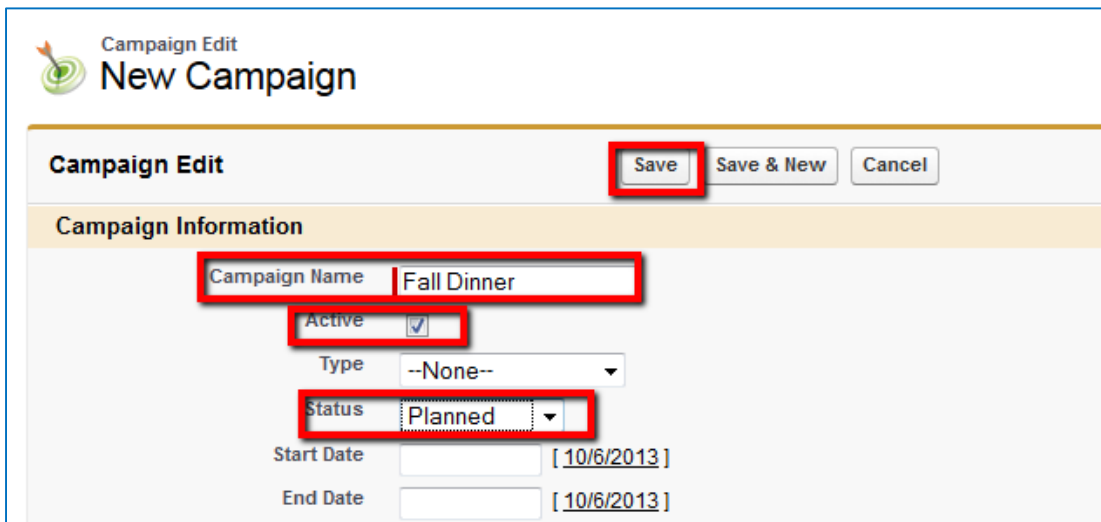



## Exercise 1: Set up Campaign for Fall Dinner

1. Go to Campaigns tab and click “New”

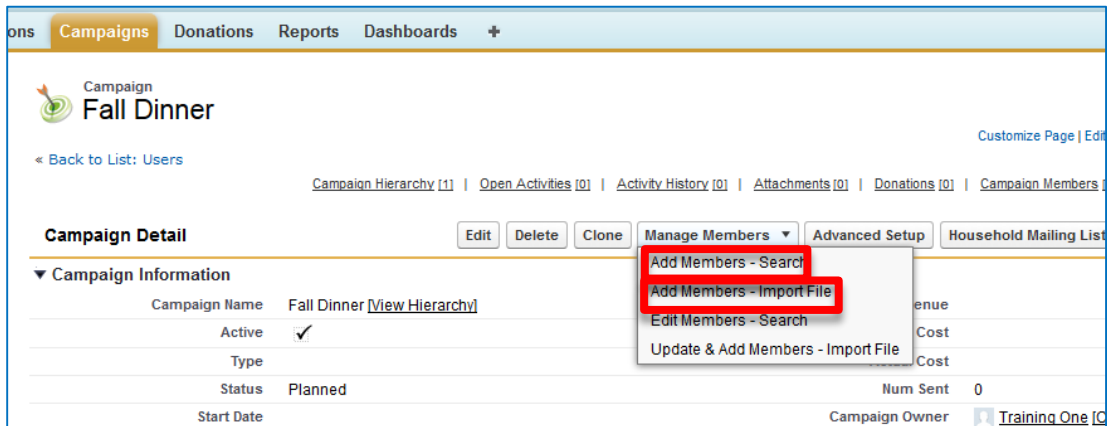


2. Under Campaign Name, enter “Fall Dinner”
3. Check “Active” (Note: This is important for it to show up in Active Campaigns)
4. Choose Status as “Planned”
5. Click “Save”

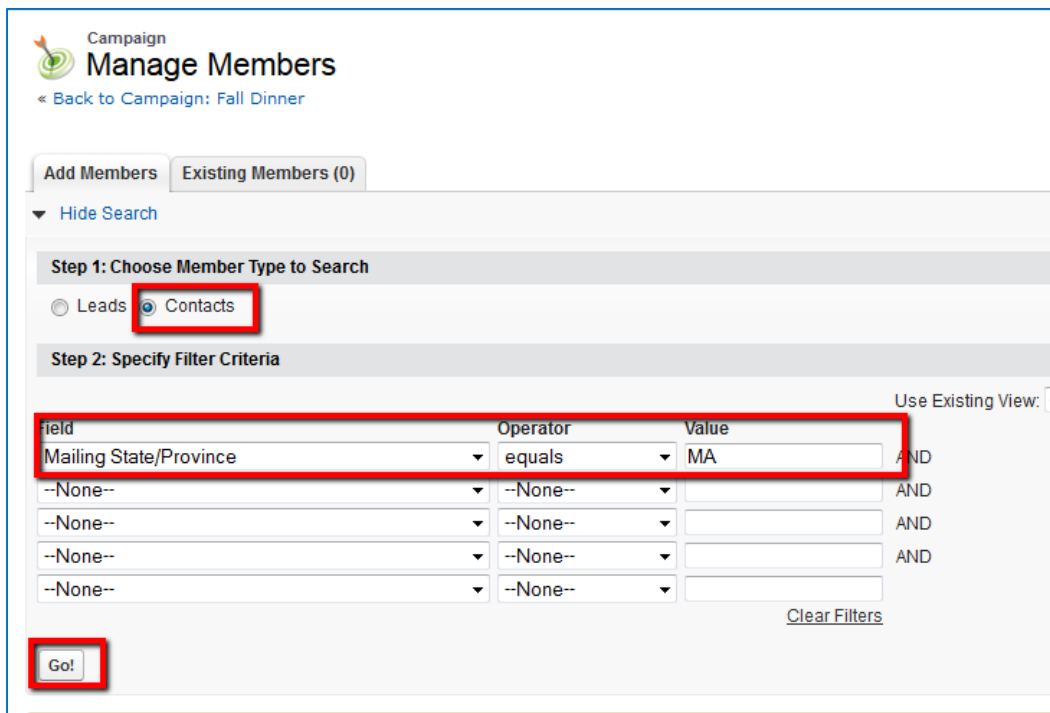




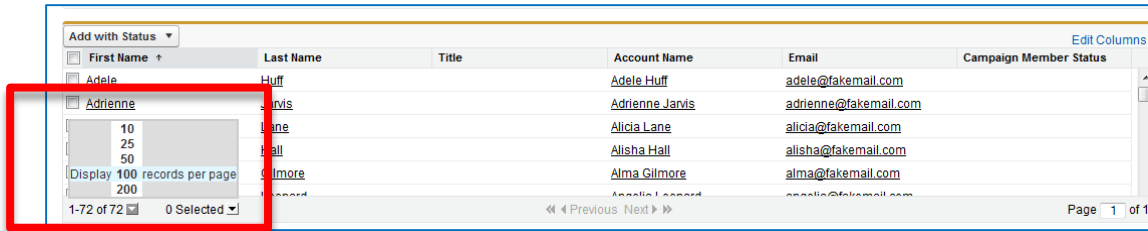
6. To add members, click on “Manage Members” and “Add Members-Search”



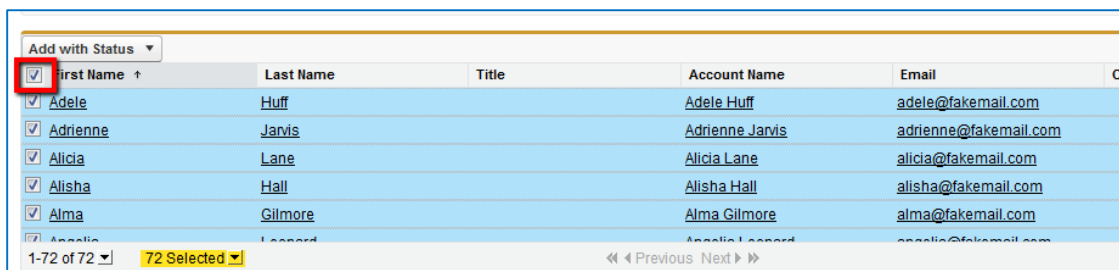
7. Choose Member Type to Search “Contacts”
8. Create Filter to specify contacts from Massachusetts
  - a. Choose Filter Field “Mailing State/Province”
  - b. Operator “Equals”
  - c. For Value, type in “MA”
  - d. Click “Go!”



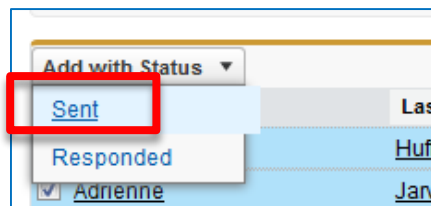
9. In the bottom left corner, select to display 100 records per page



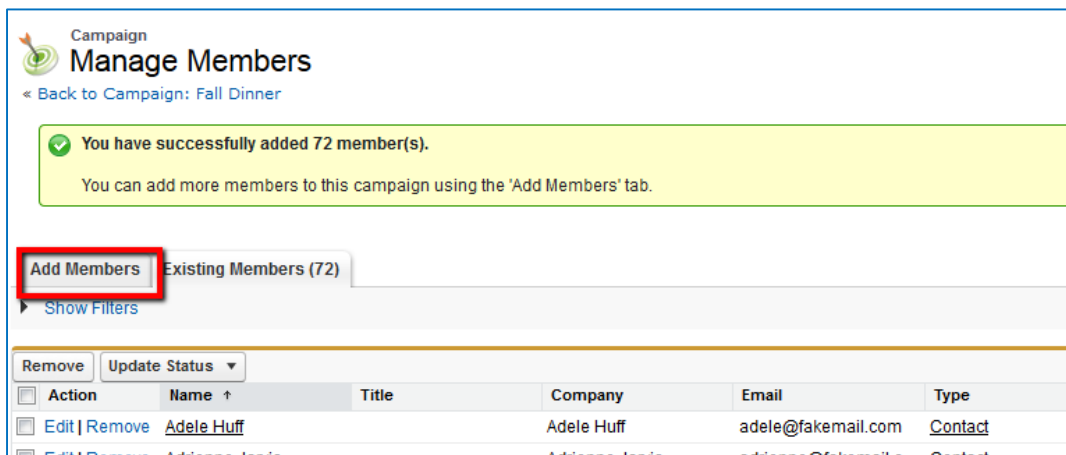
10. Check the top box next to First Name to select all records



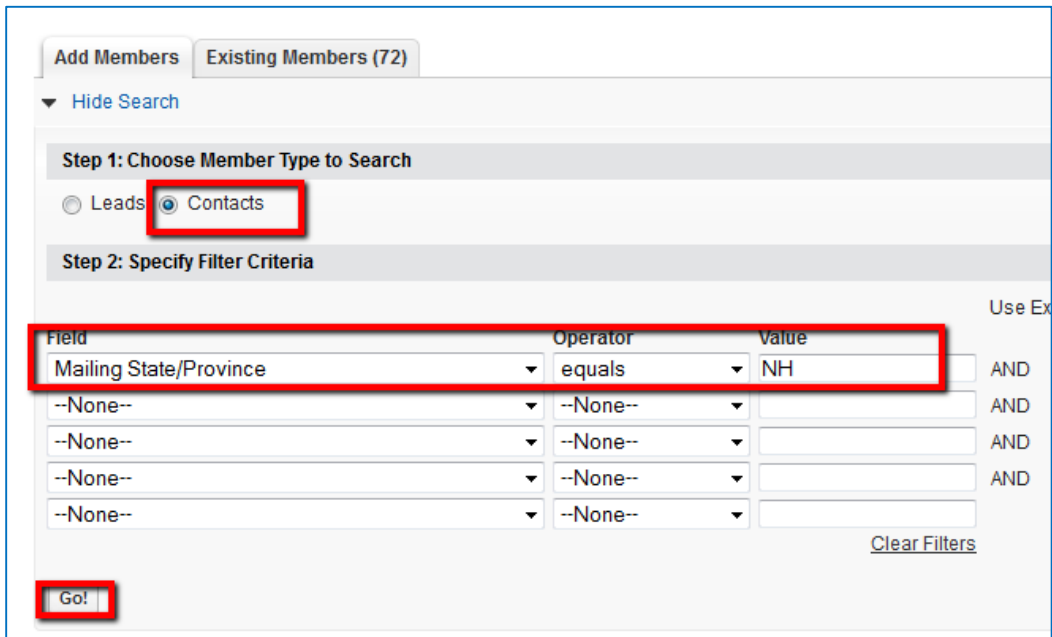
11. Under "Add with Status," select "Sent"



12. To Add more members- Contacts from NH  
 a. Choose "Add Members"



13. Choose Member Type “Contacts”
14. Choose “Mailing State/Province” “equals” “NH”
15. Click “Go”



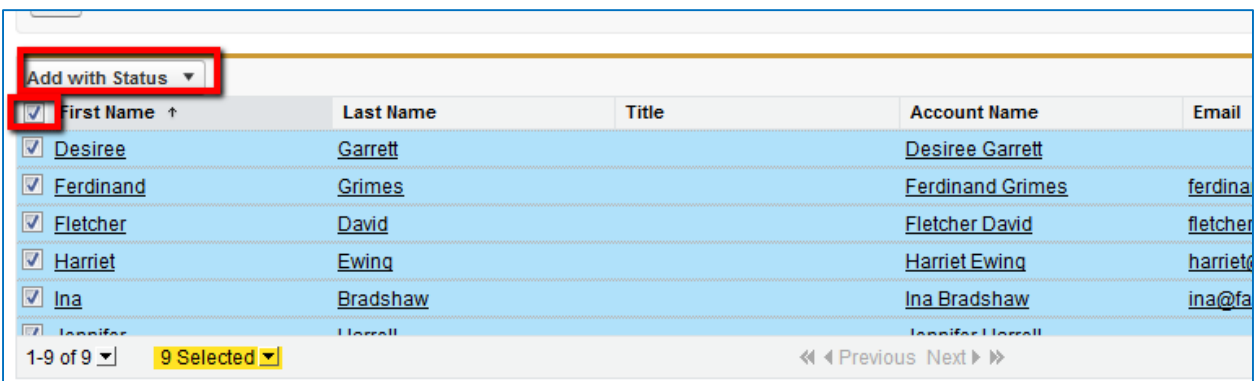
**Step 1: Choose Member Type to Search**

Leads  **Contacts**

**Step 2: Specify Filter Criteria**

Field	Operator	Value	Use Ex
Mailing State/Province	equals	NH	<input type="checkbox"/> AND
--None--	--None--		<input type="checkbox"/> AND
--None--	--None--		<input type="checkbox"/> AND
--None--	--None--		<input type="checkbox"/> AND
--None--	--None--		<input type="checkbox"/> AND

16. Select all records with the top check box
17. Choose Add with Status “Sent”

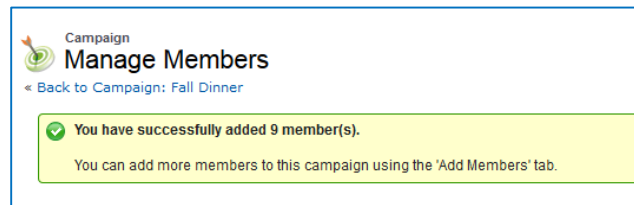


<input checked="" type="checkbox"/>	First Name ↑	Last Name	Title	Account Name	Email
<input checked="" type="checkbox"/>	Desiree	Garrett		Desiree Garrett	
<input checked="" type="checkbox"/>	Ferdinand	Grimes		Ferdinand Grimes	ferdina
<input checked="" type="checkbox"/>	Fletcher	David		Fletcher David	fletcher
<input checked="" type="checkbox"/>	Harriet	Ewing		Harriet Ewing	harriet
<input checked="" type="checkbox"/>	Ina	Bradshaw		Ina Bradshaw	ina@fa
<input checked="" type="checkbox"/>	Jennifer	Harrell		Jennifer Harrell	

1-9 of 9

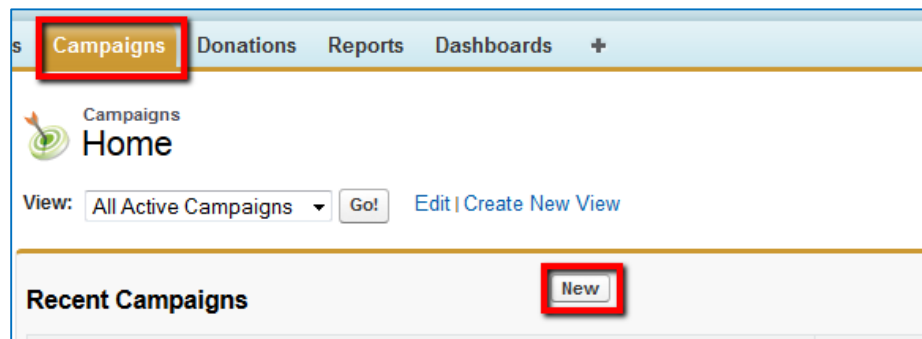


18. You will see the following message that your members have been added:



## Set up a Parent Annual Campaign with Child Poster Campaign

1. Create a new campaign



2. Write in Campaign Name "2013 Annual Appeal"
3. Check "Active"
4. Choose Status "In Progress"
5. Click "Save & New"

Campaign Edit  
New Campaign

Campaign Edit

Campaign Information

Campaign Name

Active

Type --None--

Status

Start Date  [ 10/6/2013 ]

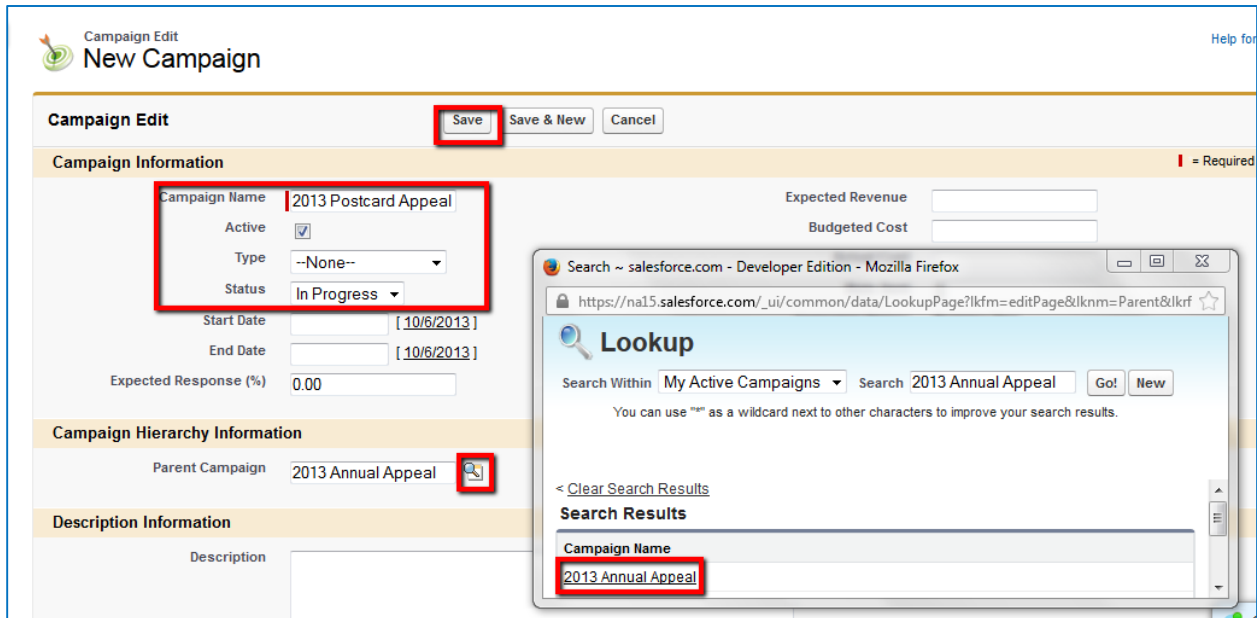
End Date  [ 10/6/2013 ]

Expected Response (%)

6. Write Campaign Name "2013 Postcard Appeal"
7. Check "Active"
8. Choose Status "In Progress" (By default "Type" shows up as "Conference")

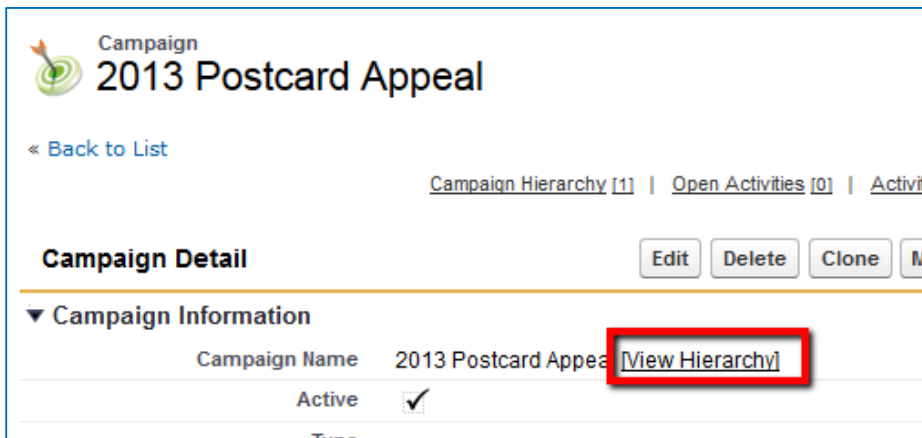


9. For Parent Campaign, use Lookup to find “2013 Annual Appeal” and click on it to populate
10. Click “Save”

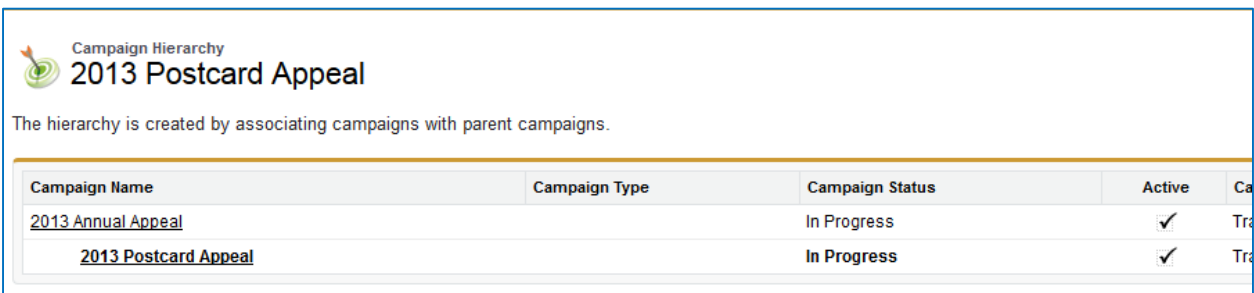


The screenshot shows the 'Campaign Edit' page for '2013 Postcard Appeal'. The 'Save' button is highlighted with a red box. The 'Campaign Information' section is also highlighted with a red box, showing fields for Campaign Name, Active status, Type, Status, Start Date, End Date, and Expected Response (%). A 'Lookup' window is open, showing search results for '2013 Annual Appeal', with the result highlighted by a red box.

11. In the 2013 Postcard Appeal Campaign Record, click on “View Hierarchy”



The screenshot shows the 'Campaign Detail' page for '2013 Postcard Appeal'. The 'View Hierarchy' button is highlighted with a red box. The page includes navigation links like 'Back to List' and 'Campaign Hierarchy [1]', and buttons for 'Edit', 'Delete', and 'Clone'.



The screenshot shows the 'Campaign Hierarchy' page for '2013 Postcard Appeal'. It includes a table listing the hierarchy of campaigns:

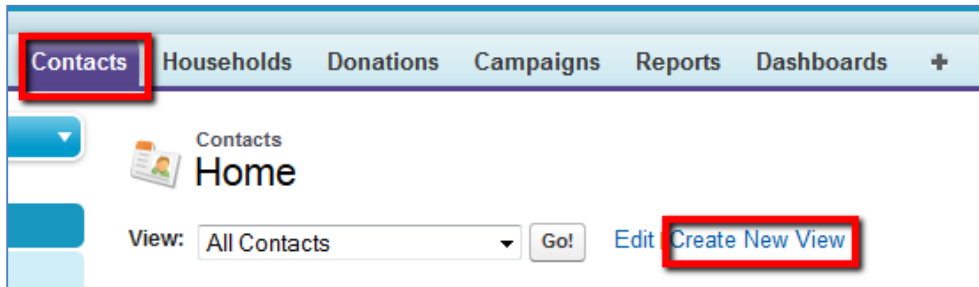
Campaign Name	Campaign Type	Campaign Status	Active	Ca
<a href="#">2013 Annual Appeal</a>		In Progress	✓	Tr
<a href="#">2013 Postcard Appeal</a>		In Progress	✓	Tr



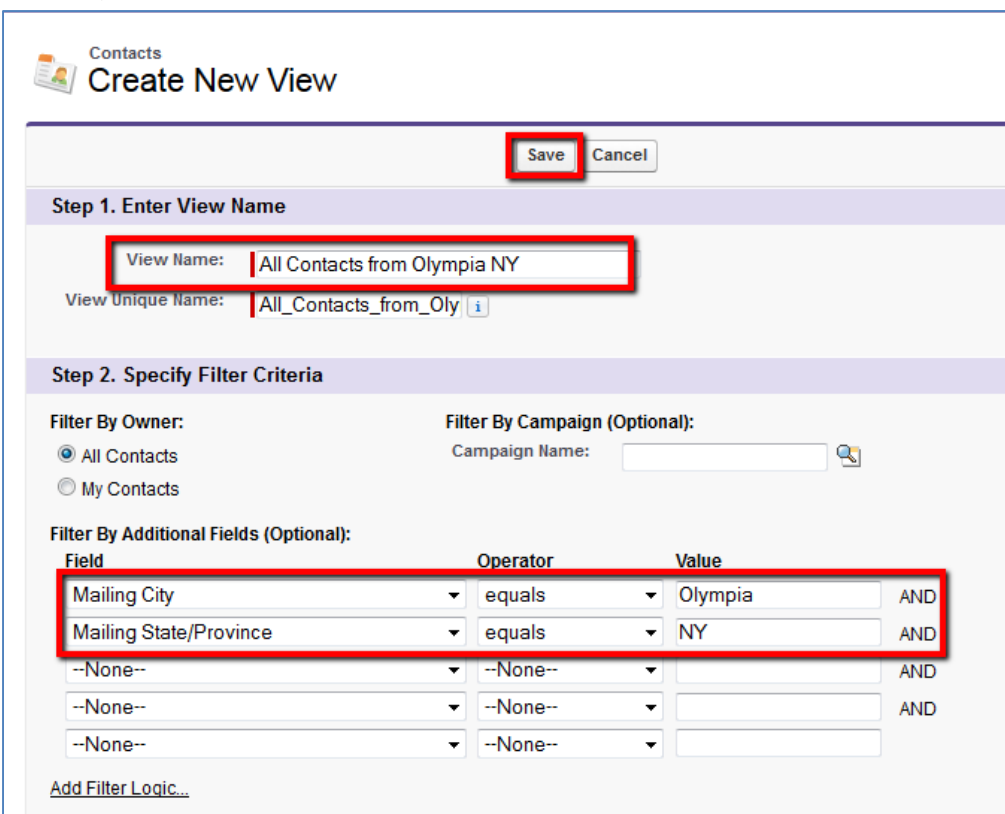
## REPORTS

### Exercise 1: Create a Custom View

- 1) Go to the Contacts tab and click on link "Create New View"



- 2) For View Name, type "All Contacts from Olympia NY"
- 3) Filter by Field "Mailing City", "equals", "Olympia, and "Mailing State/Province", "equals", "NY"
- 4) Click "Save"



**Step 1. Enter View Name**

View Name:

View Unique Name:

**Step 2. Specify Filter Criteria**

Filter By Owner:  All Contacts  My Contacts

Filter By Campaign (Optional): Campaign Name:

Field	Operator	Value	
Mailing City	equals	Olympia	AND
Mailing State/Province	equals	NY	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Add Filter Logic...](#)

- 5) You will see the new view option Contacts View pull-down and all of the corresponding records



Contacts Households Donations Campaigns Reports Dashboards +

All Contacts from Olympia NY Edit | Delete | Create New View List +

Action	Name ↑	Account Name	Title	Phone	Email	Contact Owner
Edit   Del   +	Avila, Lelia	Lelia Avila		(576) 621-5984	lelia@fakemail.com	TLead
Edit   Del   +	Banks, Lon	Lon Banks		(591) 843-9030	lon@fakemail.com	TLead
Edit   Del   +	Beasley, Cleo	Cleo Beasley		(920) 638-1661	cleo@fakemail.com	TLead
Edit   Del   +	Bell, Saul	Saul Bell		(810) 219-6517	saul@fakemail.com	TLead
Edit   Del   +	Benjamin, Ramon	Ramon Benjamin		(437) 679-1546	ramon@fakemail.com	TLead
Edit   Del   +	Bowen, Clinton	Clinton Bowen		(358) 310-2607	clinton@fakemail.com	TLead
Edit   Del   +	Britt, Floyd	Floyd Britt		(552) 113-8550	floyd@fakemail.com	TLead
Edit   Del   +	Brock, Elizabeth	Elizabeth Brock		(650) 364-9552	elizabeth@fakemail.com	TLead
Edit   Del   +	Brown, Elma	Elma Brown		(190) 182-9503	elma@fakemail.com	TLead
Edit   Del   +	Buckley, Kenneth	Kenneth Buckley		(820) 332-2041	kenneth@fakemail.com	TLead
Edit   Del   +	Cameron, Johnny	Johnny Cameron		(722) 309-6162	johnny@fakemail.com	TLead

## Exercise 2: Create a Summary Report for All Contacts by State

- 1) Click on the Reports Tab
- 2) Click on the Folder "Organization and Contacts"
- 3) Scroll down to the bottom and choose the "Mailing List" report

Home Organizations Contacts Households Donations Campaigns **Reports** Dashboards +

### Reports & Dashboards

New Report... New Dashboard...

Folders

Find a folder...

All Folders

- Unfiled Public Reports
- My Personal Custom Re...
- My Personal Dashboards
- Household Reports (Ins...
- Nonprofit Edition Report...
- Organization and Conta...**
- Opportunity Reports
- Sales Reports
- Lead Reports
- Support Reports
- Campaign Reports
- Administrative Reports
- Activity Reports
- Product and Asset Rep...
- Call Center Reports
- Content Reports

Organization and Contact Reports

Find reports and dashboards...

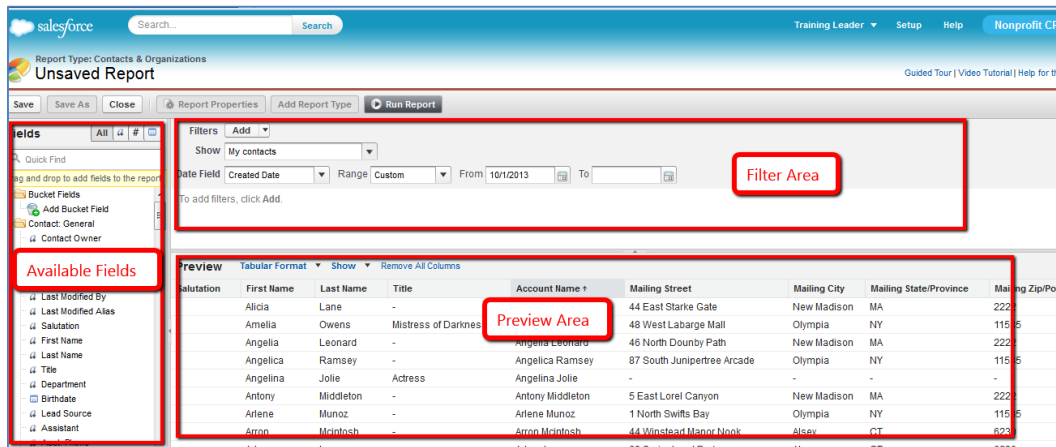
Action	Name ↑
	What is the data history of my Contact Fields?
	<b>Contact Role Report</b> Who are the contacts involved in my current deals?
	<b>HTML Email Status Report</b> Show me all HTML emails I sent this week.
	<b>Mailing List</b> Who are the contacts at my current organizations?
	<b>New Organizations</b> What organizations have been added recently?
	<b>Organizations with last activity &gt; 30 days</b> Which organizations need attention?
	<b>Partner Accounts</b> Which accounts are partners?

1-11 of 11 Previous Next





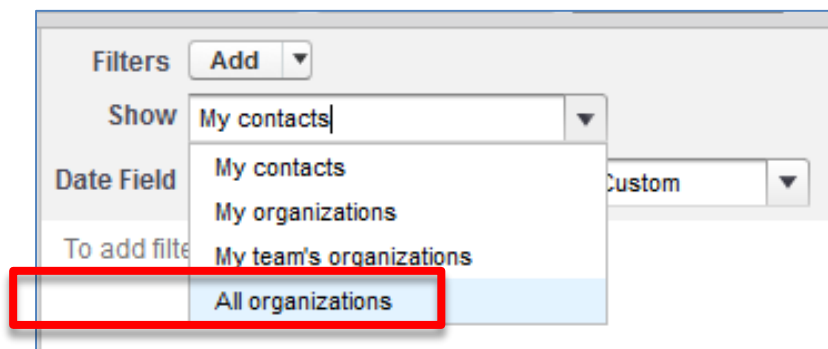
4) Your report will look like this:



The screenshot shows the Salesforce report builder interface. The 'Filters' section is highlighted with a red box and labeled 'Filter Area'. It includes a 'Show' dropdown set to 'My contacts' and a 'Date Field' dropdown set to 'Created Date' with a 'Range' of 'Custom' and a 'From' date of '10/1/2013'. The 'Available Fields' list on the left is also highlighted with a red box. The 'Preview' table below shows a list of contacts with columns for Salutation, First Name, Last Name, Title, Account Name, Mailing Street, Mailing City, Mailing State/Province, and Mailing Zip Post. The table is highlighted with a red box and labeled 'Preview Area'.

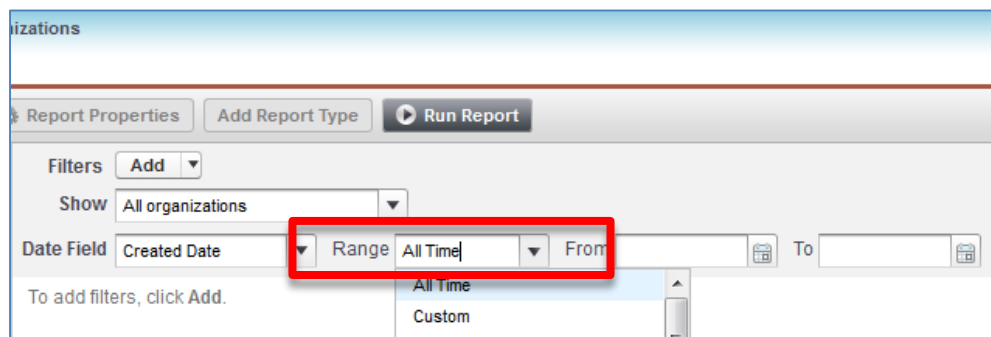
Salutation	First Name	Last Name	Title	Account Name	Mailing Street	Mailing City	Mailing State/Province	Mailing Zip Post
	Alicia	Lane	-		44 East Starke Gate	New Madison	MA	222
	Amelia	Owens	Mistress of Darkness		48 West Labarge Mall	Olympia	NY	115
	Angella	Leonard	-	Angella Leonard	46 North Dounby Path	New Madison	MA	222
	Angella	Ramsey	-	Angella Ramsey	87 South Junipertree Arcade	Olympia	NY	115
	Angelina	Jolie	Actress	Angelina Jolie	-	-	-	-
	Antony	Middleton	-	Antony Middleton	5 East Lorel Canyon	New Madison	MA	222
	Arlene	Munoz	-	Arlene Munoz	1 North Swifts Bay	Olympia	NY	115
	Arron	McIntosh	-	Arron McIntosh	44 Winstead Manor Nonk	Alsey	CT	623

5) For Show, select "All Organizations" (this actually means "All Contacts")



This close-up shows the 'Show' dropdown menu in the filter area. The menu is open, showing options: 'My contacts', 'My organizations', 'My team's organizations', and 'All organizations'. The 'All organizations' option is highlighted with a red box.

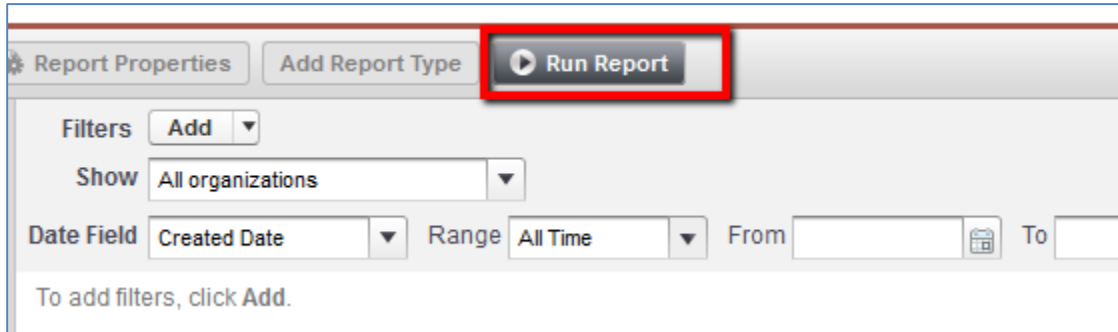
6) For Date Field, select "All Time"



This close-up shows the 'Date Field' dropdown menu in the filter area. The menu is open, showing options: 'All Time' and 'Custom'. The 'All Time' option is highlighted with a red box.



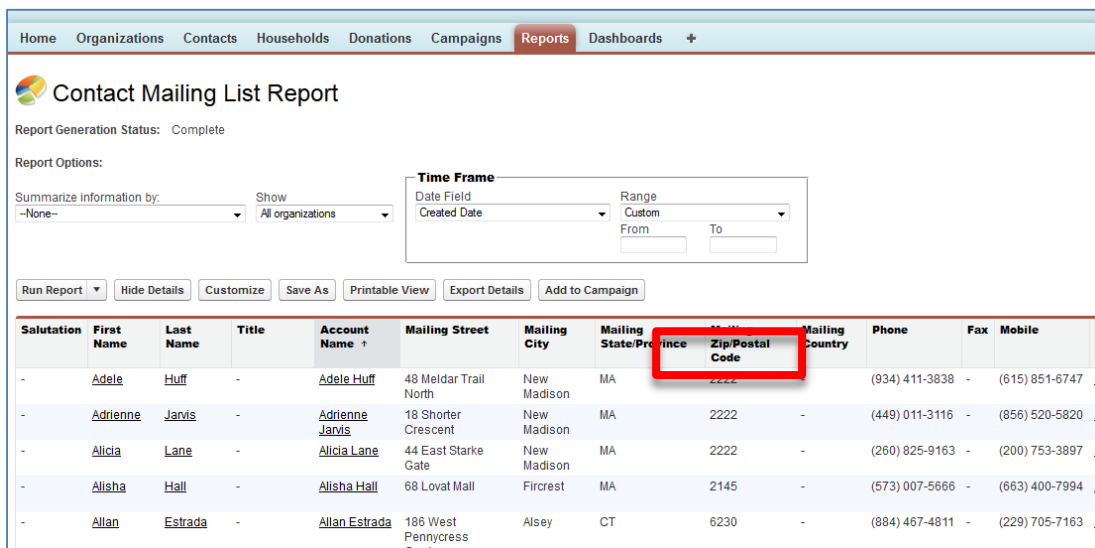
7) Click “Run Report”



The screenshot shows a software interface with a top navigation bar containing 'Report Properties', 'Add Report Type', and a 'Run Report' button with a play icon, which is highlighted with a red rectangle. Below this are filter options: 'Filters Add', 'Show All organizations', 'Date Field Created Date', 'Range All Time', and 'From' and 'To' date pickers. A note at the bottom says 'To add filters, click Add.'

Your report will look like this:

8) Click “Add to Campaign”



The screenshot shows a 'Contact Mailing List Report' with a navigation bar (Home, Organizations, Contacts, Households, Donations, Campaigns, Reports, Dashboards) and a report generation status of 'Complete'. Below are report options for summarizing information and time frame. A table of contact data is displayed with the following columns: Salutation, First Name, Last Name, Title, Account Name, Mailing Street, Mailing City, Mailing State/Province, Zip/Postal Code, Mailing Country, Phone, Fax, Mobile, and Email. The 'Zip/Postal Code' column is highlighted with a red rectangle.

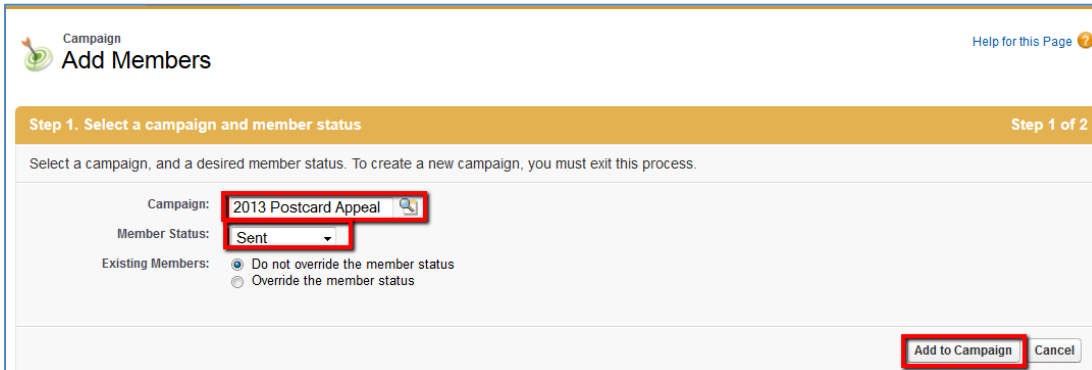
Salutation	First Name	Last Name	Title	Account Name	Mailing Street	Mailing City	Mailing State/Province	Zip/Postal Code	Mailing Country	Phone	Fax	Mobile	Email
-	Adele	Huff	-	Adele Huff	48 Meldar Trail North	New Madison	MA	2222	-	(934) 411-3838	-	(615) 851-6747	ad
-	Adrienne	Jarvis	-	Adrienne Jarvis	18 Shorter Crescent	New Madison	MA	2222	-	(449) 011-3116	-	(856) 520-5820	ad
-	Alicia	Lane	-	Alicia Lane	44 East Starke Gate	New Madison	MA	2222	-	(260) 825-9163	-	(200) 753-3897	al
-	Alisha	Hall	-	Alisha Hall	68 Lovat Mall	Fircrest	MA	2145	-	(573) 007-5666	-	(663) 400-7994	al
-	Allan	Estrada	-	Allan Estrada	186 West Pennycross Gardens	Alsey	CT	6230	-	(884) 467-4811	-	(229) 705-7163	al

9) Lookup Campaign and choose “2013 Postcard Appeal”

10) Choose Member Status “Sent”



11) Click “Add to Campaign”



Campaign Add Members Help for this Page

**Step 1. Select a campaign and member status** Step 1 of 2

Select a campaign, and a desired member status. To create a new campaign, you must exit this process.

Campaign: 2013 Postcard Appeal

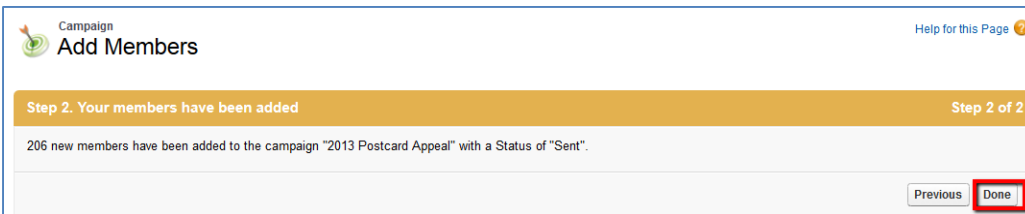
Member Status: Sent

Existing Members:  Do not override the member status  
 Override the member status

Add to Campaign Cancel

12) You will receive the following confirmation

13) Click “Done”



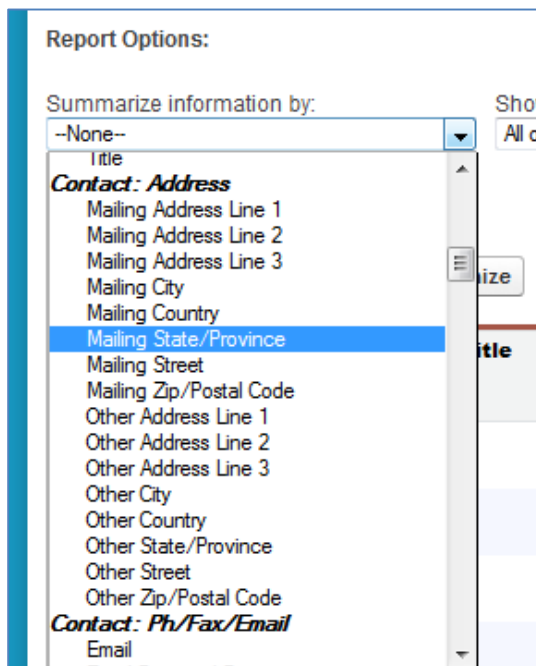
Campaign Add Members Help for this Page

**Step 2. Your members have been added** Step 2 of 2

206 new members have been added to the campaign "2013 Postcard Appeal" with a Status of "Sent".

Previous Done

14) In Summarize information by: scroll down and select “Mailing State/Province”



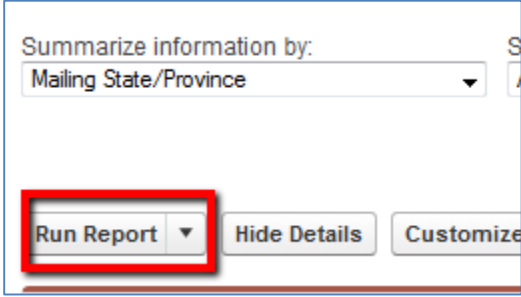
**Report Options:**

Summarize information by:

- None--
- Title
- Contact: Address**
- Mailing Address Line 1
- Mailing Address Line 2
- Mailing Address Line 3
- Mailing City
- Mailing Country
- Mailing State/Province
- Mailing Street
- Mailing Zip/Postal Code
- Other Address Line 1
- Other Address Line 2
- Other Address Line 3
- Other City
- Other Country
- Other State/Province
- Other Street
- Other Zip/Postal Code
- Contact: Ph/Fax/Email**
- Email



15) Click “Run Report”



Summarize information by:  
 Mailing State/Province

Run Report Hide Details Customize

16) You will see that your contacts have been grouped by State in the report

17) Click “Hide Details”

Report Generation Status: Complete

Report Options:

Summarize information by: Mailing State/Province Show All organizations

Time Frame  
 Date Field Created Date Range Custom From To

Run Report Hide Details Customize Save As Printable View Export Details Add to Campaign

Salutation	First Name	Last Name	Title	Account Name	Mailing Street	Mailing City	Mailing Zip/Postal Code	Mailing Country	Phone
Mailing State/Province: (1 record)									
-	Angelina	Jolie	Actress	Angelina Jolie	-	-	-	-	-
Mailing State/Province: CT (51 records)									
-	Allan	Estrada	-	Allan Estrada	186 West Pennycrest Gardens	Alsey	6230	-	(884) 467-4811

18) The report will provide a summary of records numbers for each State



19) Click on “Save As”

Report Generation Status: Complete

Report Options:

Summarize information by: Mailing State/Province Show All organizations

Time Frame: Date Field Created Date Range Custom From

Run Report Show Details Customize **Save As** Printable View Export Details **Add to Campaign**

<input type="checkbox"/>	Mailing State/Province: - (1 record)
<input type="checkbox"/>	Mailing State/Province: CT (51 records)
<input type="checkbox"/>	Mailing State/Province: MA (74 records)
<input type="checkbox"/>	Mailing State/Province: Mass. (1 record)
<input type="checkbox"/>	Mailing State/Province: NH (9 records)
<input type="checkbox"/>	Mailing State/Province: NY (66 records)
<b>Grand Totals (202 records)</b>	

Name Report “Contacts By State”

20) Choose Report Folder “Unfiled Public Reports”

21) Click “Save & Return to Report”

Save Report

Report Name: **Contacts By State**

Report Unique Name: Contacts\_By\_State

Namespace Prefix:

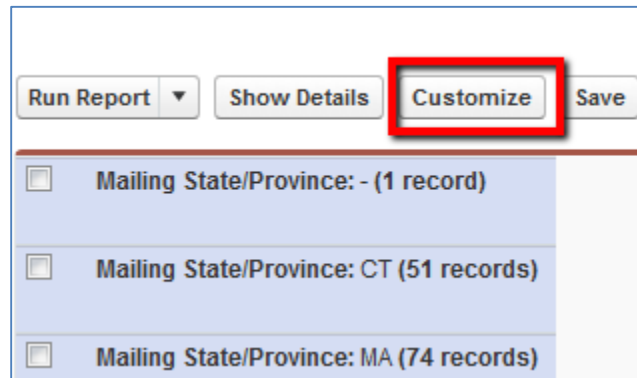
Report Folder: **Unfiled Public Reports**

Save & Return to Report Cancel

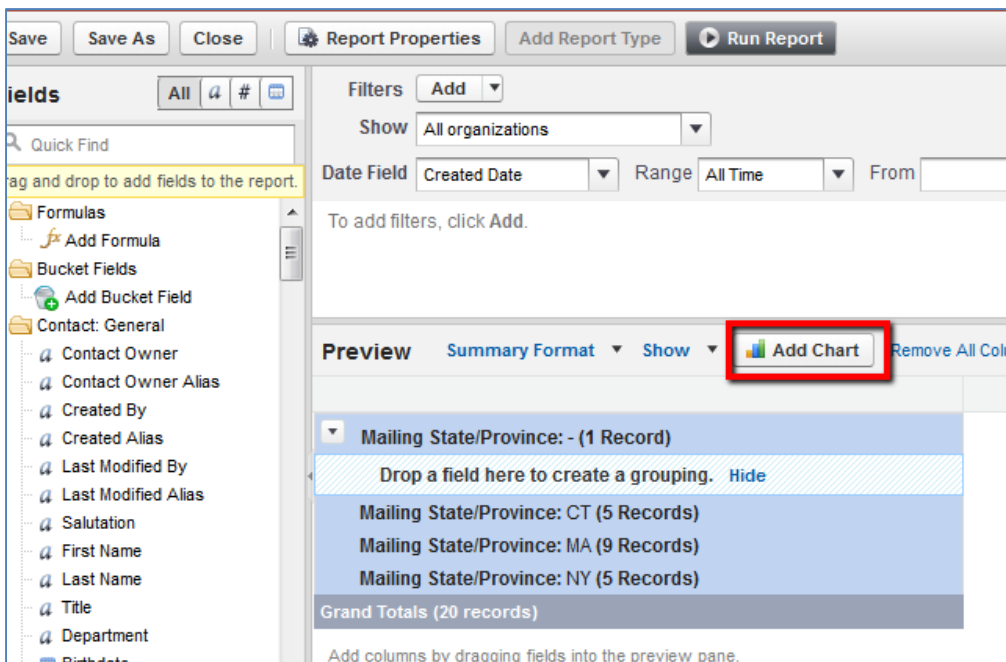


## Create a Chart for Contacts by State

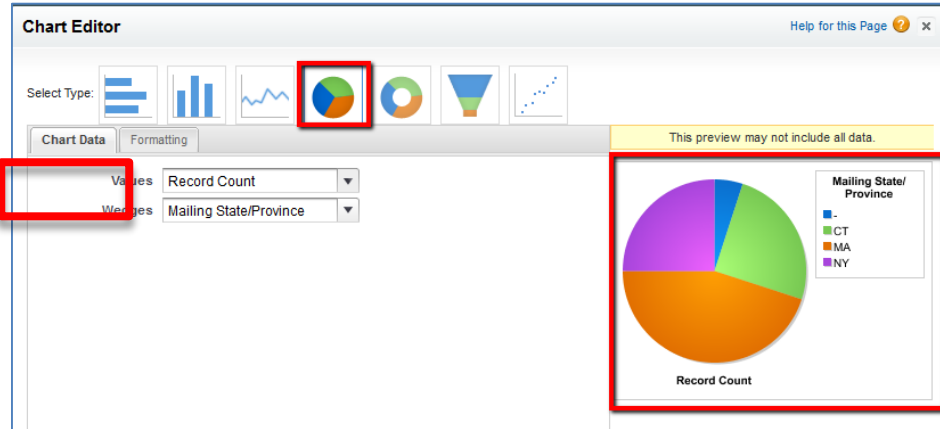
- 1) Go back to report and click “Customize”



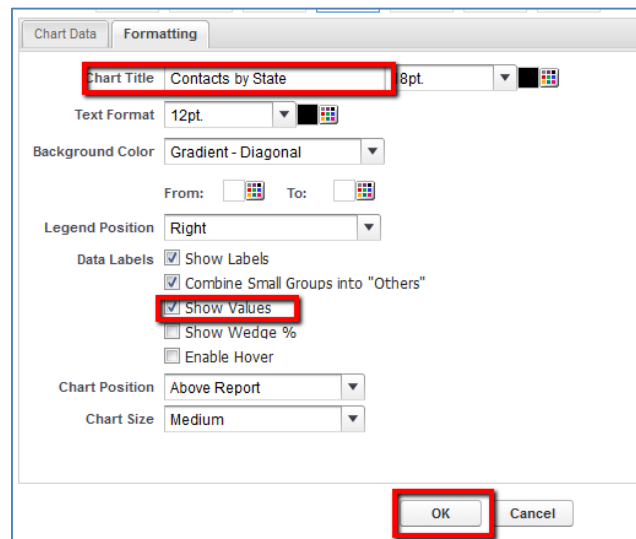
- 2) Click “Add Chart”



- 3) Click on the different chart types and preview to decide which best displays the data
- 4) Select Pie Chart type
- 5) Click on the Formatting tab

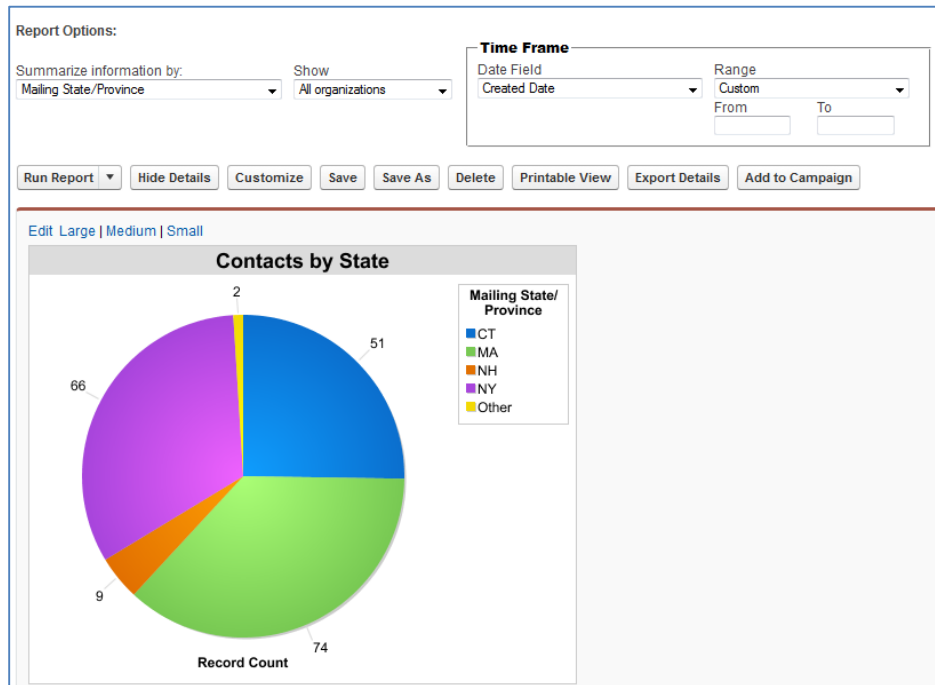


- 6) Name the Chart "Contacts by State"
- 7) Check the box for "Show Values"
- 8) Click "OK"



- 9) You will see a preview screen. Click "Run Report"

10) Your chart should look like this:



11) Save chart in “Unfiled Public Reports” and click “Save”

Report Name:

Report Description:

Report Unique Name:

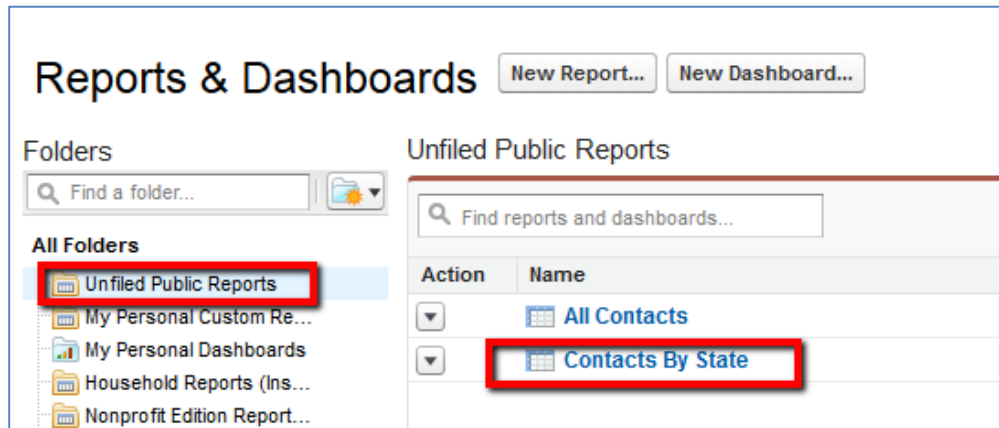
Namespace Prefix

Report Folder:



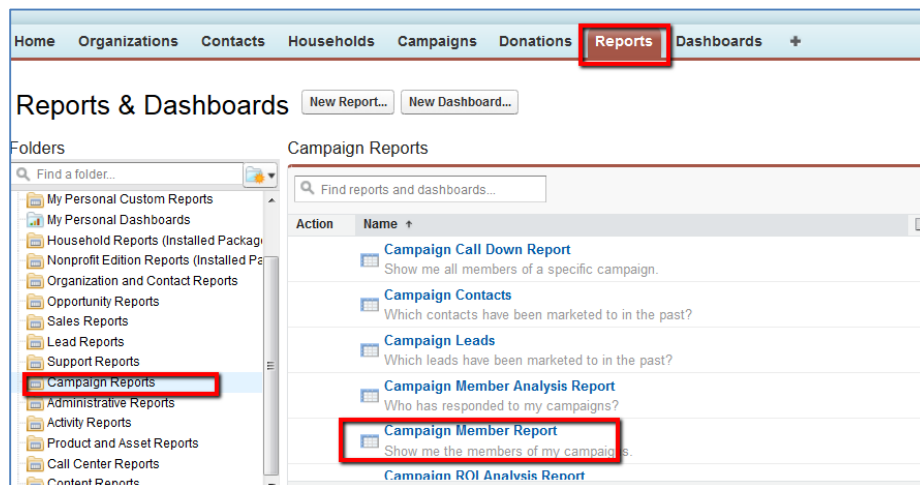


12) You can find your chart In the Reports tab under the “Unfiled Public Reports” folder



## Create a Chart for Campaign Members

- 1) Click on Reports Tab
- 2) Choose “Campaign Report” Folder
- 3) Choose “Campaign Member Report”



Select “Customize”



**Campaigns with Campaign Members**

Report Generation Status: Complete

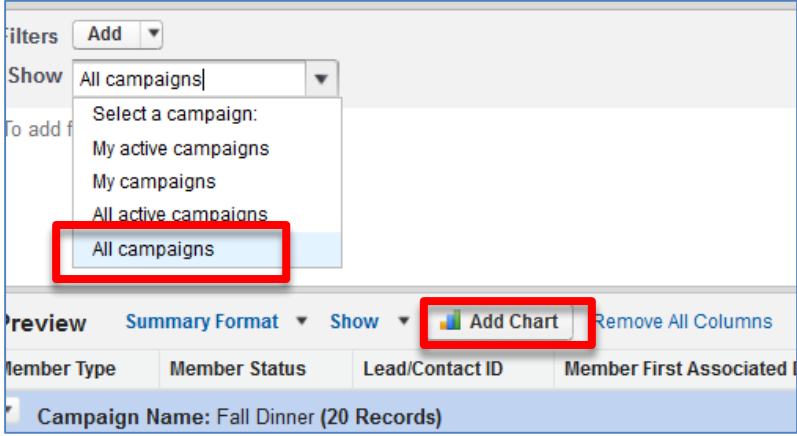
Report Options:

Summarize information by:  Show  Select campaign:

Member Type	Member Status	Lead/Contact ID	Member First Associated Date	Member Status Update Date	Member First Responded Date	Responded	Sal	Title	Company
Campaign Name: <u>2013 Postcard Appeal</u> (206 records)									
Contact	Sent	003i000000N4zic	10/16/2013	10/16/2013	-	<input type="checkbox"/>	-	-	lan

4) Show “All Campaigns”

5) Click “Add Chart”



filters

Show

To add f

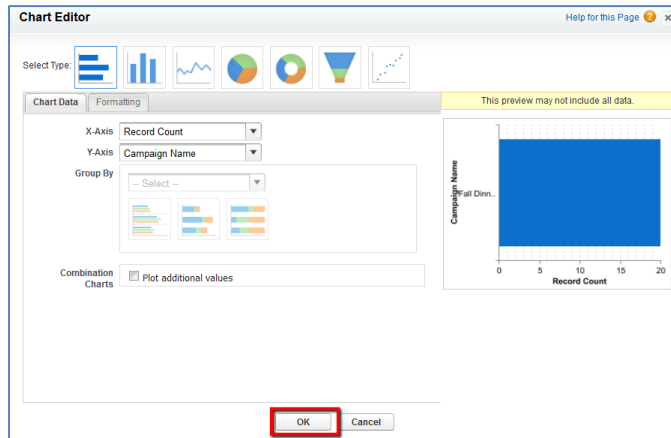
- Select a campaign:
- My active campaigns
- My campaigns
- All active campaigns
- All campaigns**

Preview

Member Type	Member Status	Lead/Contact ID	Member First Associated
Campaign Name: <u>Fall Dinner</u> (20 Records)			

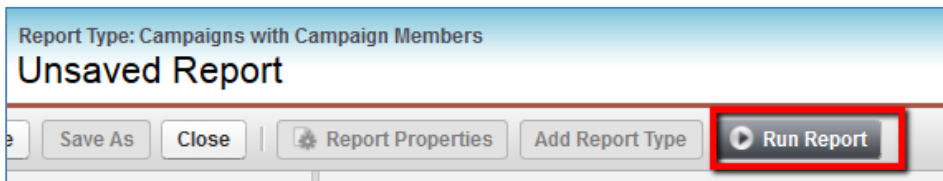


6) The Chart Editor will show a preview (Note: this does not show all data until you run the report)

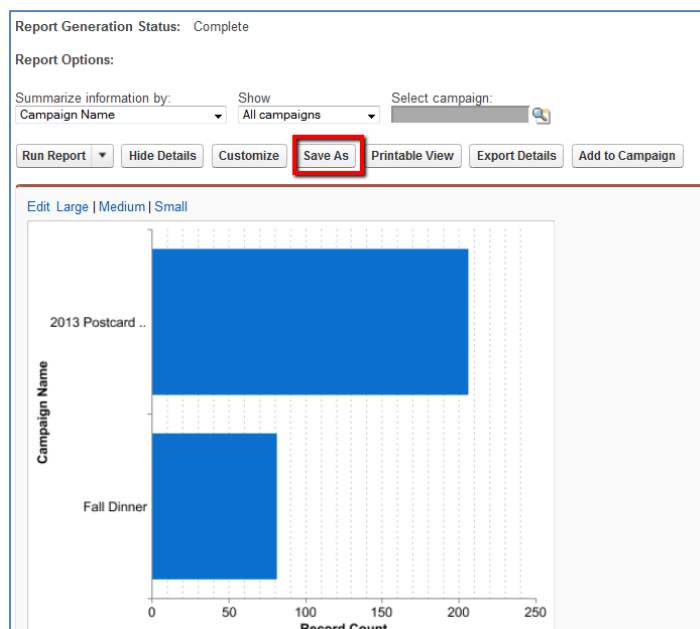


Click "OK"

Click "Run Report"



Your chart should look like this:



- 7) Click “Save As”
- 8) Name Report “Campaign Members” and write a description
- 9) Save under “Unfiled Public Reports” folder

Click “Save & Return to Report”

### Save Report

Report Name

Report Description

Report Unique Name  ⓘ

Namespace Prefix

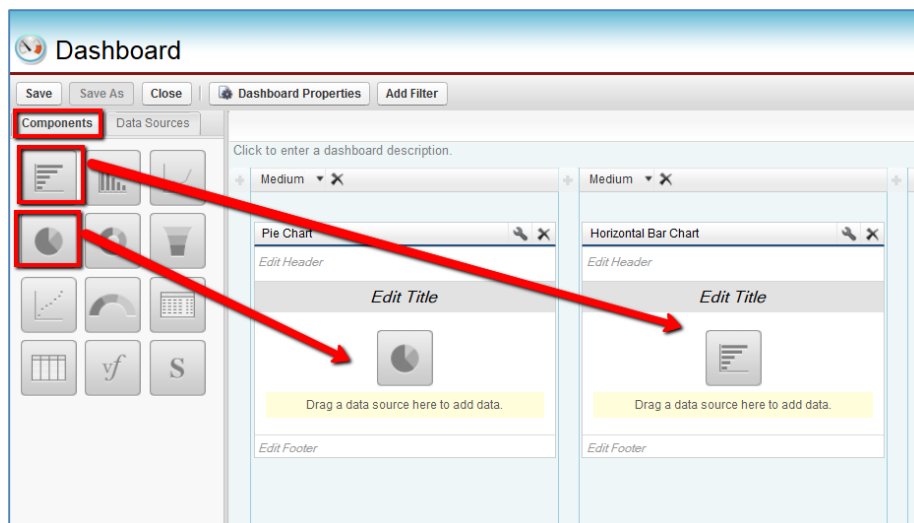
Report Folder

## DASHBOARDS

- 1) Select Reports Tab
- 2) Click “New Dashboard”

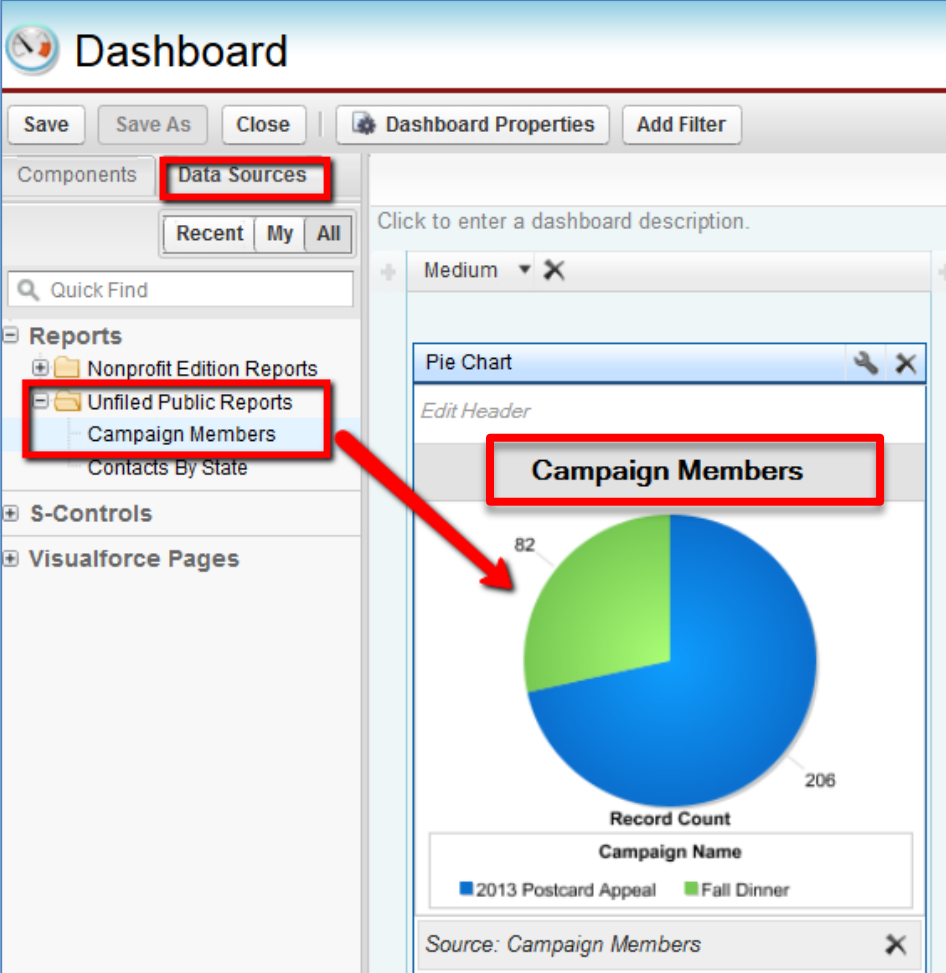


- 3) On Components Tab, drag over a Pie Chart and a Bar Chart into the box areas



- 4) Click on Data Sources tab
- 5) Select Reports → Unfiled Public Reports → Campaign Members
- 6) Drag “Campaign Members” report into Pie Chart (note: this will take a moment to populate)

7) Name Chart “Campaign Members”



The screenshot shows a Salesforce dashboard with a pie chart titled "Campaign Members". The chart displays two segments: "2013 Postcard Appeal" with a value of 206 and "Fall Dinner" with a value of 82. The legend below the chart identifies the colors: blue for "2013 Postcard Appeal" and green for "Fall Dinner". The source is listed as "Campaign Members". In the left sidebar, the "Reports" section is expanded, and "Campaign Members" is highlighted. A red box highlights the "Data Sources" tab in the top navigation bar, and another red box highlights the "Campaign Members" report title in the chart header. A red arrow points from the "Campaign Members" report in the sidebar to the chart.

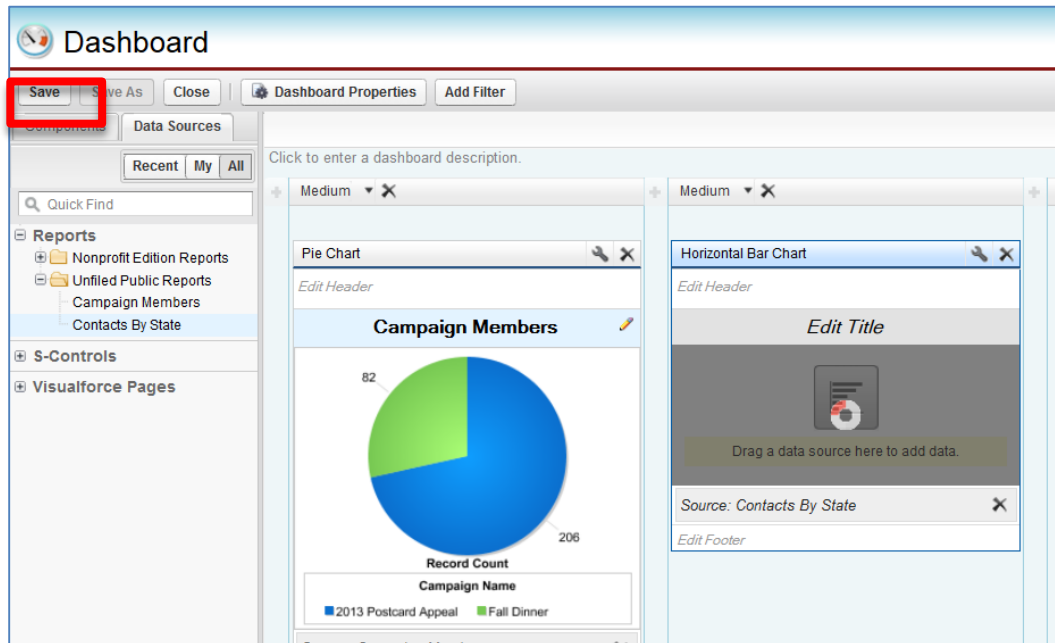
Campaign Name	Record Count
2013 Postcard Appeal	206
Fall Dinner	82

Select “Contacts by State” report and Drag to Horizontal Bar Chart

8) Name Title “Contacts By State”



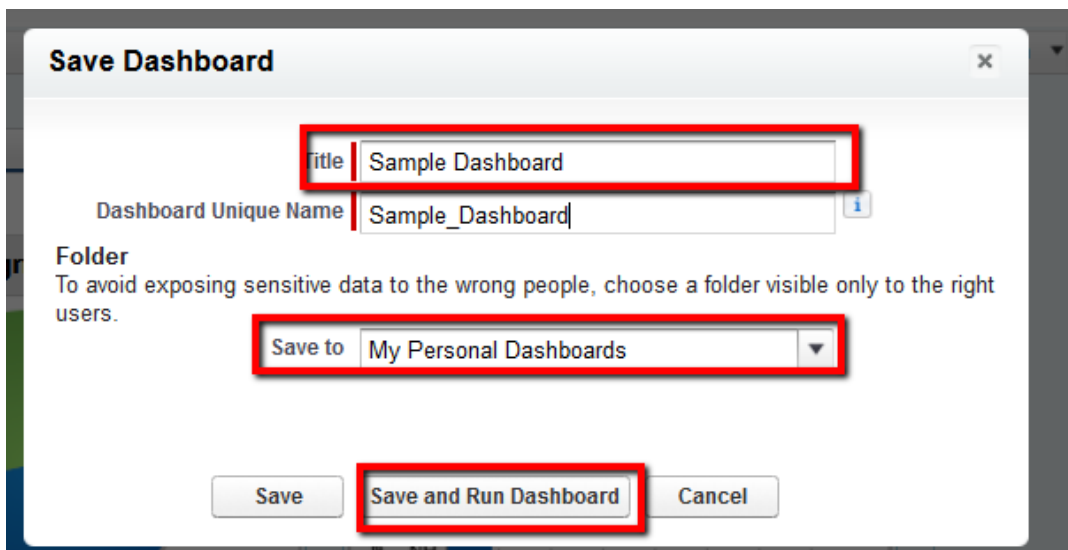
9) Save Dashboard



10) Name Dashboard “Sample Dashboard”

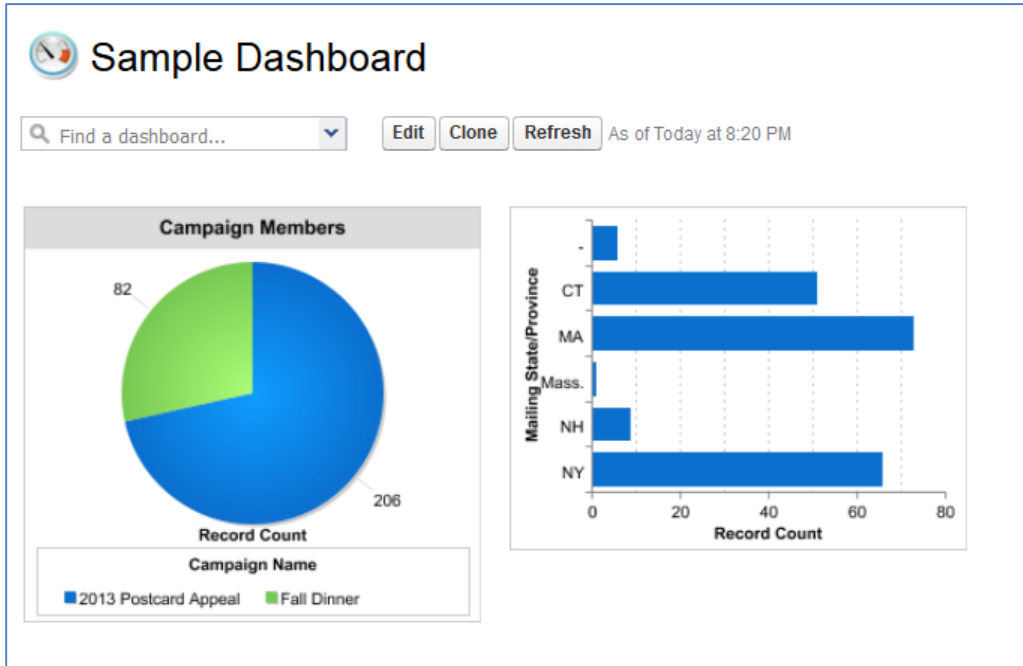
11) Save to “My Personal Dashboards”

12) Click “Save and Run Dashboard”



13) By default your dashboard saves to the Home tab

14) Your Sample Dashboard should look like this:





## APPENDICES

### Nonprofit Translator

*The Salesforce CRM was originally created for Business-to-Business (B2B) companies, so sometimes a little translation can be helpful to nonprofits implementing Salesforce. Check out this vocabulary list for some basic definitions and translations. From <http://www.salesforce.org/help/translator/>*

**ACCOUNT:** an organization, company, or partner that you want to track — for example, a partner organization, a Foundation, another nonprofit, a school, or a company where your contact is employed. In Salesforce, all contacts are tied to accounts. In the Nonprofit Starter Pack, there are two methods for managing individual contacts and accounts.

**APPEXCHANGE:** a sharing interface from salesforce.com that allows you to browse and share apps and services for the Force.com platform via the web. The AppExchange allows you to extend the functionality of Salesforce with Apps for things like: sending bulk email; managing volunteers; ticket sales; online donation processing, and more.

**APP:** short for “application.” Basically, an app is a collection of components such as tabs, reports, dashboards, and Visualforce pages that address a specific organizational need. Salesforce.com provides standard apps such as Sales and Marketing. The Nonprofit Starter Pack or "Nonprofit CRM" is an app from Salesforce.org. You can create a custom app or download other apps like these from the AppExchange.

**CAMPAIGN:** a series of tactics and/or programs designed to achieve a certain organizational objective. For nonprofits, this objective might be fundraising, calls to action, client outreach, education, volunteer management or raising awareness. And it might include tactics like mass email, events, direct mail, and advertising.

**CLOUD COMPUTING:** a model for software development and distribution where the technology infrastructure for a service, including data, is hosted on the Internet. This allows users to develop and use services with Internet browsers instead of investing in hardware, software, or maintenance. Watch [What is Cloud Computing?](#)

**CONTACT:** those individuals associated with your organization. They can be donors, volunteers, clients, students, etc. Your org can set up multiple contact types. All contacts must be associated to an account unless they are a private "person" account.

**CUSTOM OBJECT:** custom records or fields that are grouped together and that allow you to store information that is unique to your organization. You can use custom objects to manage your unique programs and services.

**DASHBOARD:** A visual representation of your report data. It gives you a real-time snapshot of your outcome measurements and key evaluation indicators. Click on a dashboard to see the report from which it is created. Learn more about dashboards



**HOUSEHOLD:** In the Nonprofit Starter Pack, the Households package provides the ability to group contacts around a physical address, limiting mailings to only one piece per physical address, and aggregating donation and membership information.

**LEAD:** a potential “sales” opportunity. When you see “leads,” think prospective donors, program participants, members, etc. These are people who might have expressed an interest in your programs, but with whom you have yet to have significant interaction.

**OBJECT:** This allows you to store information in your Salesforce.com organization. The object is the overall definition of the type of information you are storing. If you are familiar with Excel, you might think about an object as a worksheet or a table. "Contacts" is a standard object in Salesforce CRM.

**OPPORTUNITIES:** an opportunity is a transactional activity that you want to track. For nonprofits, think of opportunities as grant applications, pledge payments, individual donations, product sales, fee-for-service activities, or any other financial transaction. In the Nonprofit Starter Pack, Opportunities have been renamed “Donations.”

**ORGANIZATION (or org):** An organization is the virtual space provided to an individual customer of salesforce.com. Your organization includes all of your data and applications, and is separate from all other organizations.

**PROFILE:** a profile in Salesforce is a group of settings and permissions assigned to a user. Profiles controls what a user can do in Salesforce. There are standard profiles. Or you can create custom profiles. These are different from an individual Chatter profile.

**SALES:** ok, you know what this is, but whenever you see it in Salesforce documentation, just think about it in terms of relationship building for donations, fee-for-service, membership and other nonprofit transactional relationships.

**SANDBOX:** A sandbox in Salesforce is a copy of what Salesforce calls your “production environment” – the Salesforce organization where you do your work and where your live data is stored. Sandboxes are completely isolated from your production organization, so anything that you do in your sandboxes will not affect your production application and vice-versa. That makes sandboxes the perfect place to test applications from the AppExchange, develop customizations of your own, and do staff training.



## Translating the Standard Objects



\*From Salesforce.org's "Getting Started with Salesforce" Webinar



## Account Models

Salesforce is one of the most widely used business applications in the world. One of the things that makes it so powerful is its ability to be adapted to multiple industries and functions. One of the most important ways that Salesforce adapts is through its Account Models. Salesforce will look and behave differently depending on the Account Model that you are using. For our purposes, there are four Account Models that you should be aware of:

### The Default Business-to-Business Account Model (“Clean Slate”)

Salesforce was originally designed to connect for-profit companies. In these situations, the most important connection to keep track of is between one business and another. Individuals as representatives of their company may come and go, but the connection will generally be maintained. Therefore the focus of this Account Model is the companies themselves, not their employees or representatives.

However when Salesforce decided to enter the non-profit space, it became quickly apparent that the Business-to-Business Account Model was not appropriate. Non-profit agencies rely much more on relationships with specific individuals, not the organizations they represent. This is most evident in development work, where funders may be representing a foundation, for example, but most often are donating in their capacity as private citizens and therefore represent only themselves. Because of this, Salesforce created the Non-Profit Starter Pack as a series of adaptations in the way Salesforce works to make it more responsive to the needs of NPOs. The major change of the NPSP is in the Account Model. There are three options for an Account Model in the NPSP:

- 1) The Household Model: This model is new to Salesforce since NPSP version 3 was released in August 2014 and it is the recommended model for Salesforce users moving forward. In this model, each individual household is the focus in Salesforce, and includes the activities of each member of the household. A household can be comprised of a single individual, or it can include spouses, parents, children, and whoever else may be linked, generally as indicated by their residing at the same address.
- 2) The One-to-One Model: This Account Model was most widely used by non-profits before the introduction of NPSP v.3. When a new contact was created, one-to-one worked by creating a shadow account that duplicated the action of a business in the conventional model. While effective in allow NPOs to maintain individual contacts as the primary focus in Salesforce, the shadow account in One-to-One was often considered unnecessarily confusing.
- 3) The Individual Account (Bucket) Model: This model gets its name from the fact that all Individual contacts are considered part of the same account, or that they are all put in the same bucket. The disadvantage of this approach is that it forces you to create Households separately and deliberately connect individuals to them, adding several steps to creating Contacts.

