501partners

Salesforce Bootcamp 101 for Nonprofits Workbook

SALESFORCE NON-PROFIT BOOTCAMP

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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) using the hashtag #501Bootcamp. 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 to be part of this!

Revised February 2016

Contents

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

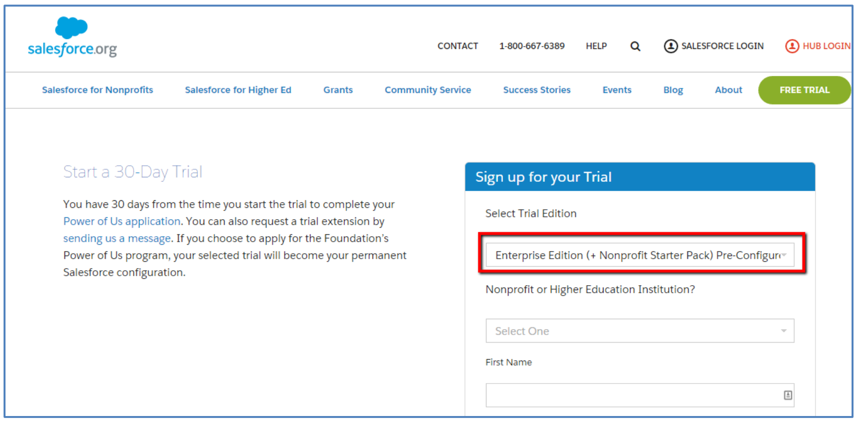
A Note about Account Models:

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:

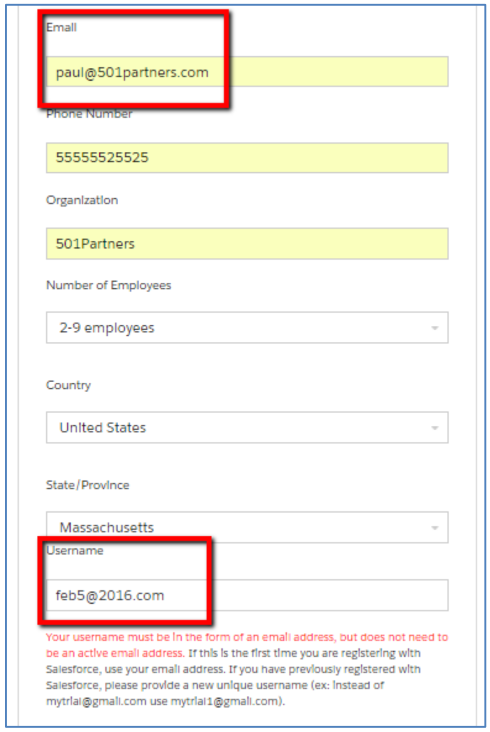
1. Go to www.salesforce.org/start-trial and complete the form. Be sure to request the selection "Pre-Configured for Donor Management" in order to get the Non-Profit Starter Pack.



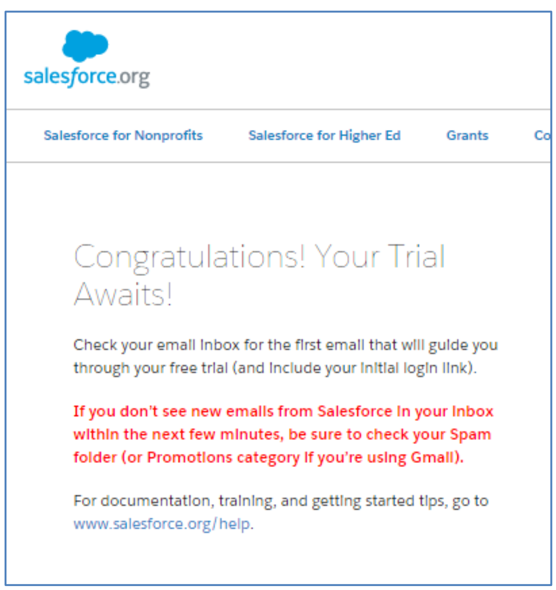
2. There are two similar fields that you must complete correctly:
    a. "Email"
    b. "Username"

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

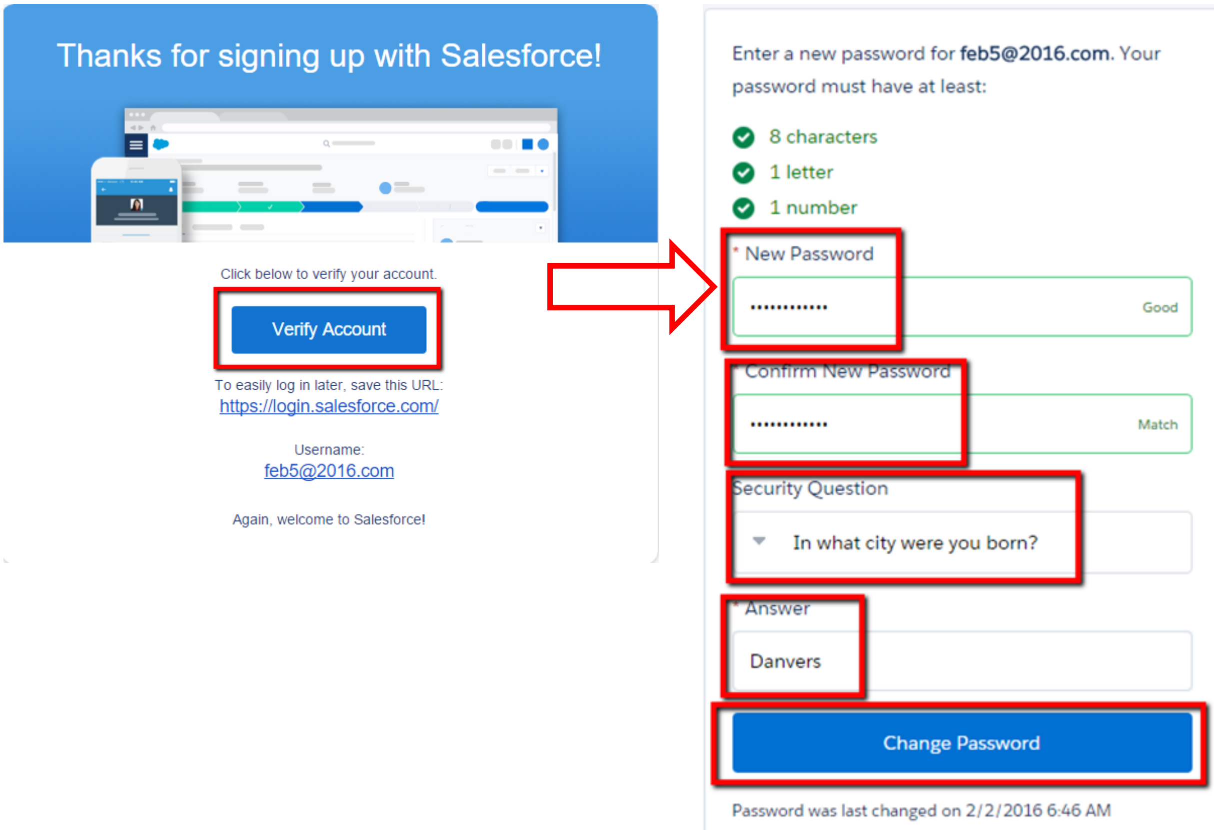
"Username" needs to be in the form of an email, but because this is a trial instance DO NOT use your real email. Salesforce remembers every username and will not let you use it again, even in your company's real Salesforce account.



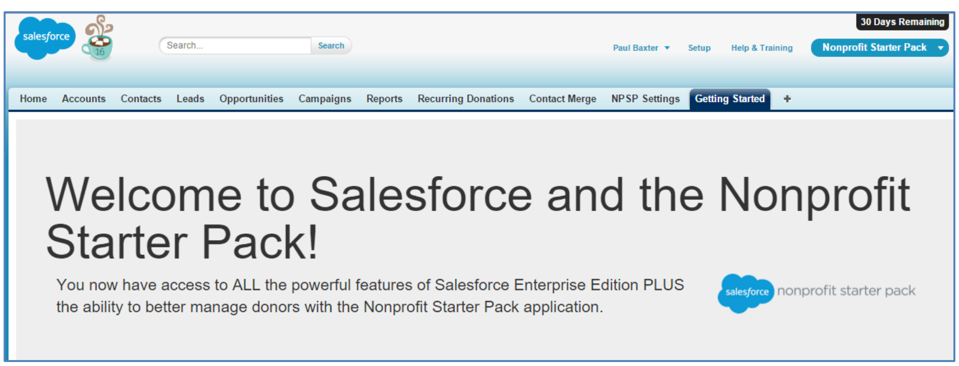
Salesforce will confirm your new account and instruct you to check your email



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



4. And you are ready to use Salesforce!



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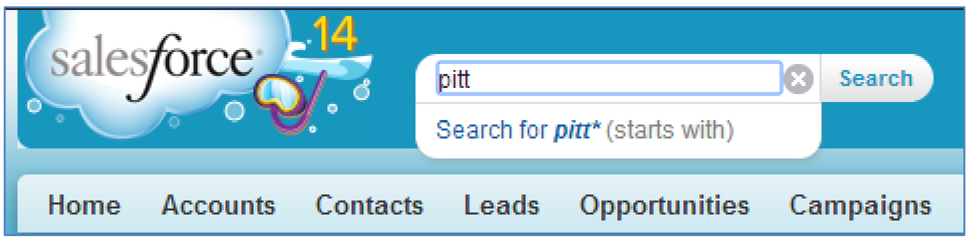
ENTERING CONTACTS AND ORGANIZATIONS

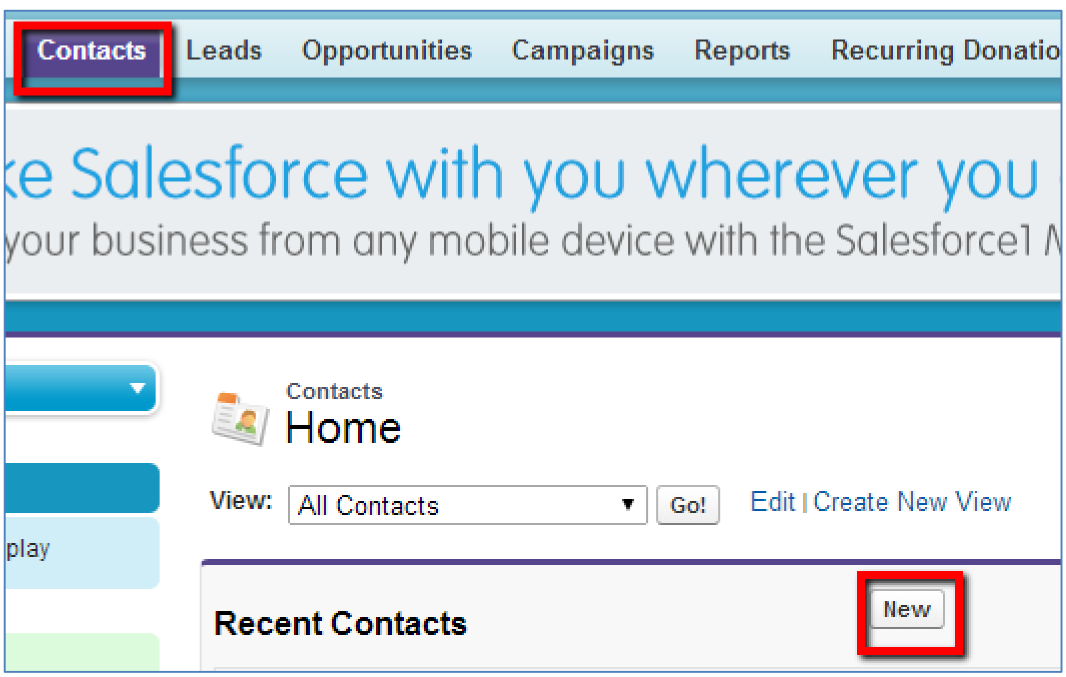
Exercise 1: Create Two Individual Contacts and connect them in a Household

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

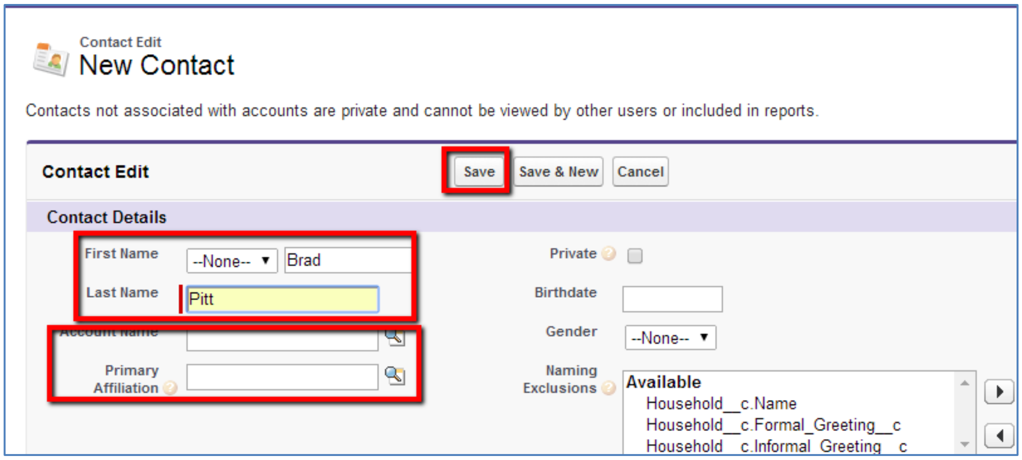
1. Create an individual record for Brad Pitt.
   1) Search to see if "Pitt" is in the system



   2) Click the Contacts tab and click "New"

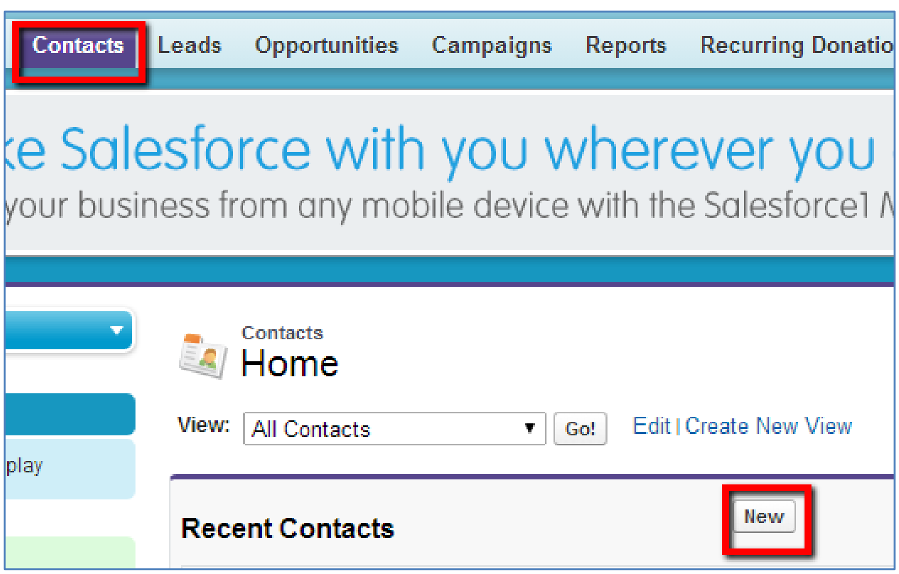


3) Enter First Name “Brad”, Last Name “Pitt”
4) Leave Household and Account blank (this will automatically be populated)
5) Click “Save”

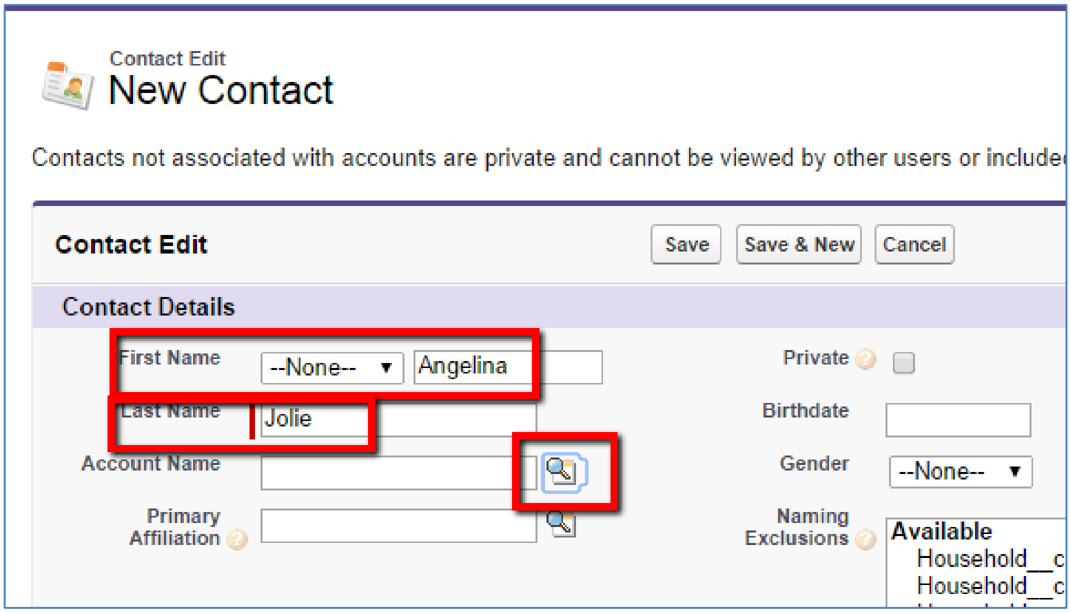


2. Create an individual record for Angelina Jolie
   1) Search to see if “Jolie” is in the system

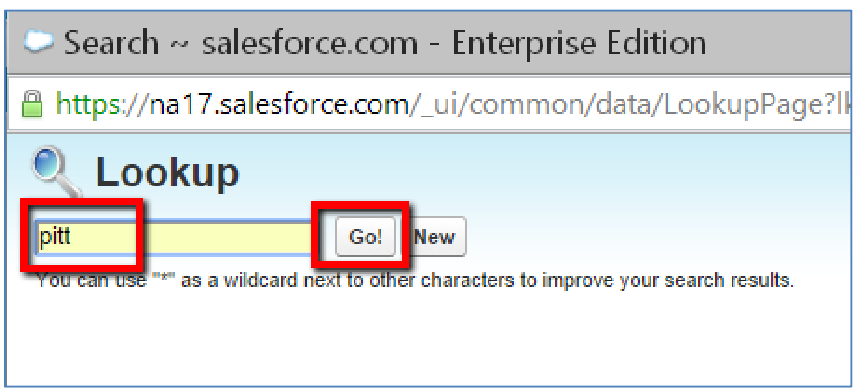
   2) Click the Contacts tab and click “New”



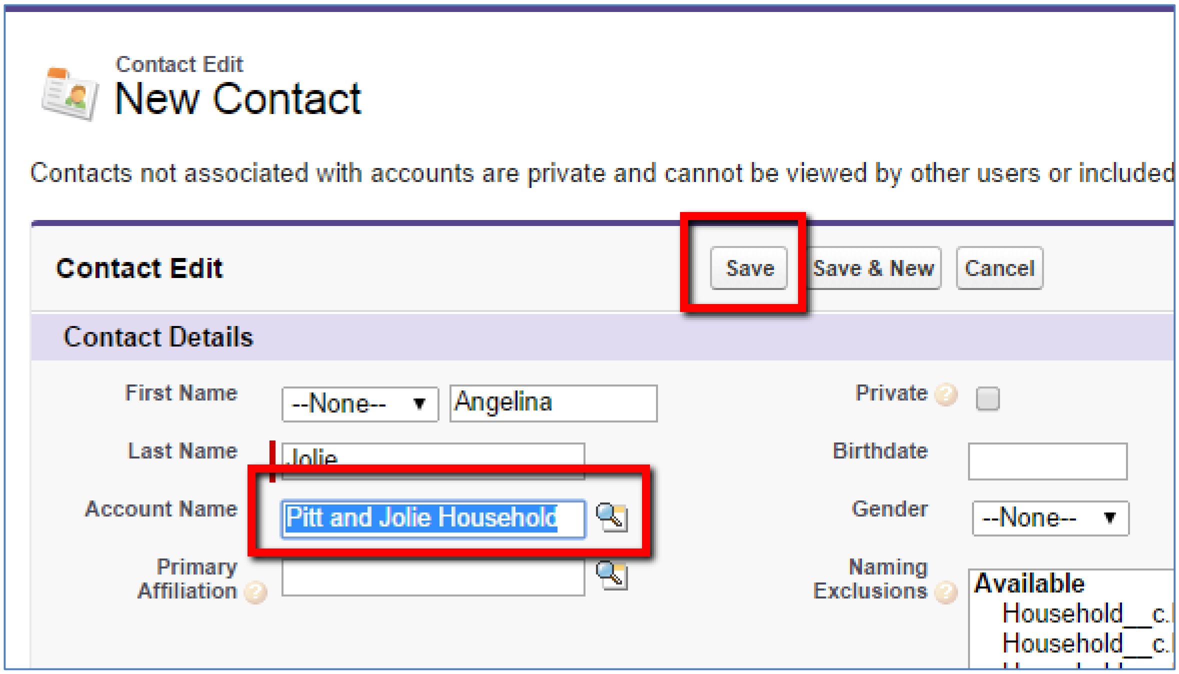
1) Enter First Name "Angelina", Last Name "Jolie." DO NOT click "Save" In the Angelina Jolie Contact Detail field, click the "Lookup" button



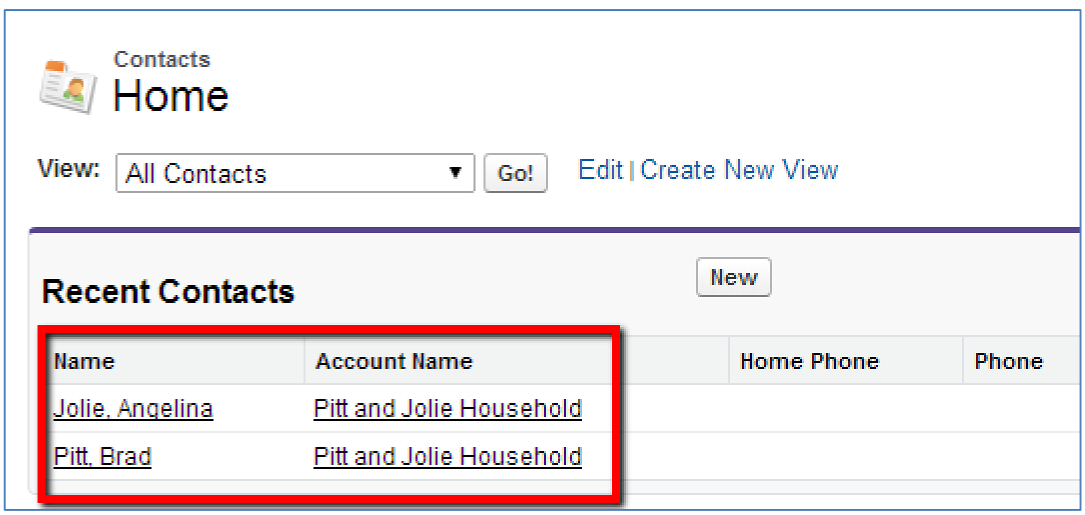
2) Into the Lookup Search Field, type "Pitt" and click "Go" to make Angelina Jolie join the Pitt Household:



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



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



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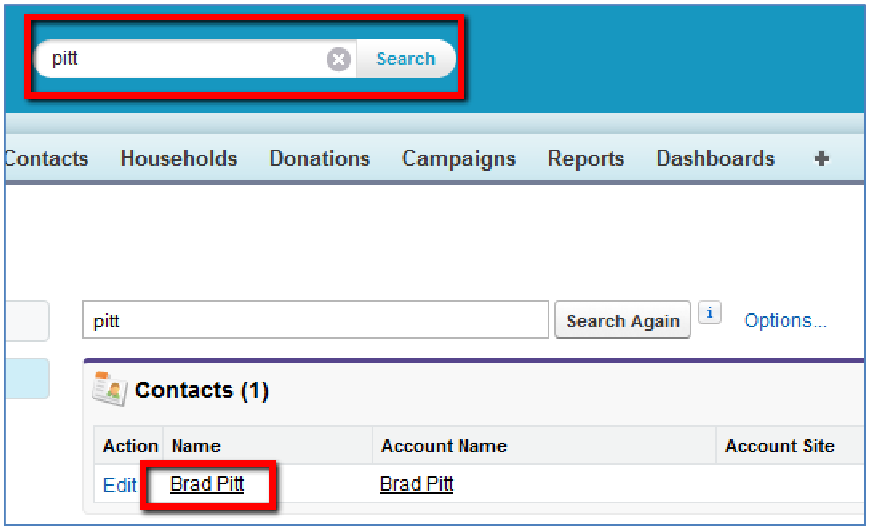
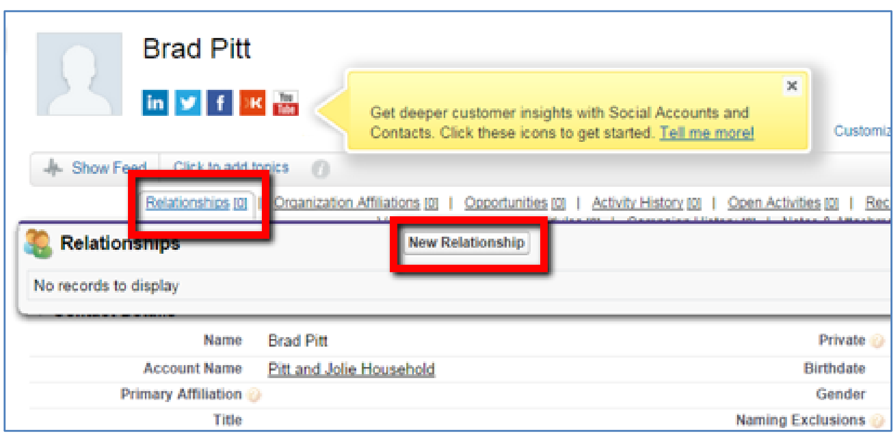
3. Specify the relationship between two records

Relationship: A connection between two individual contacts

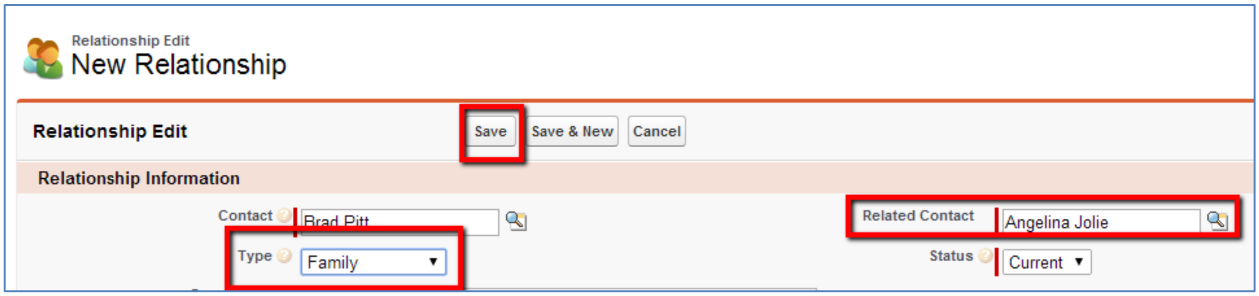
1) Search and pull up Brad Pitt's record



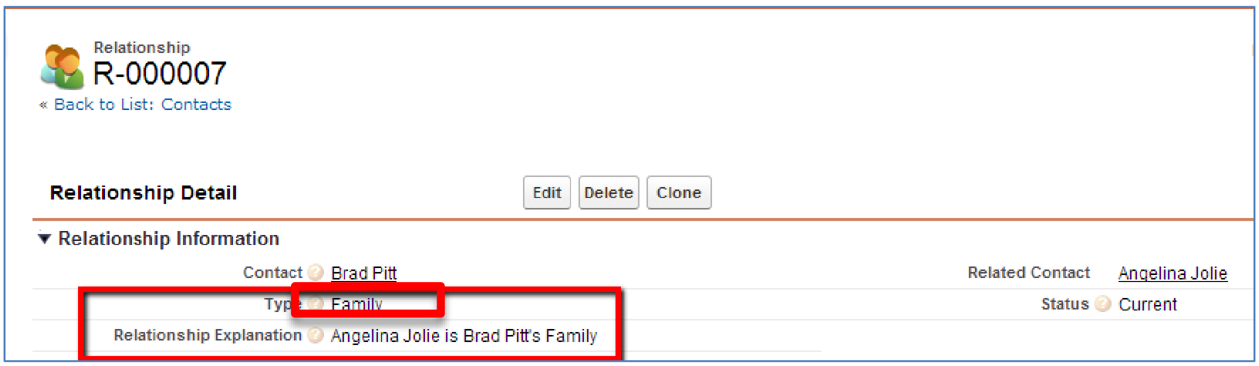
2) Hover over "Relationships" and select "New Relationship"



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”

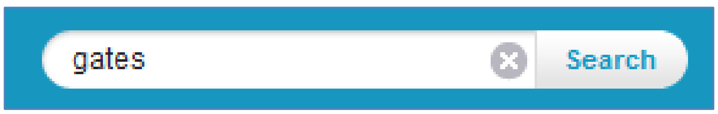


Now try your own! Create records for two individuals connected to your organization who are in the same Household and connect them.

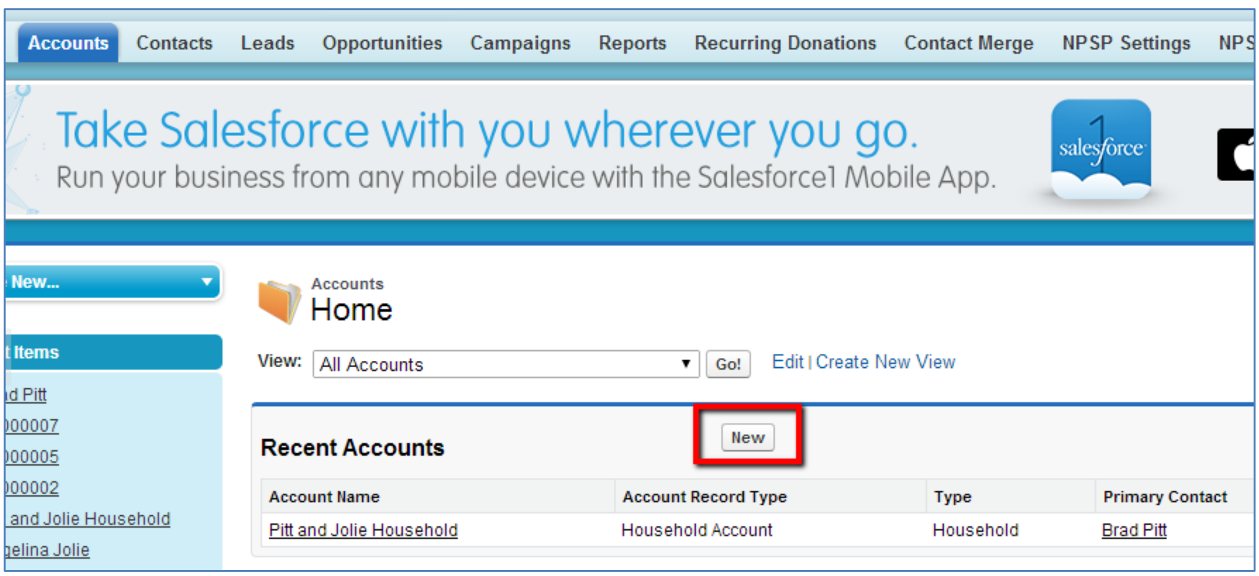
CREATE AN ORGANIZATION AND AN ORGANIZATIONAL CONTACT

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"



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



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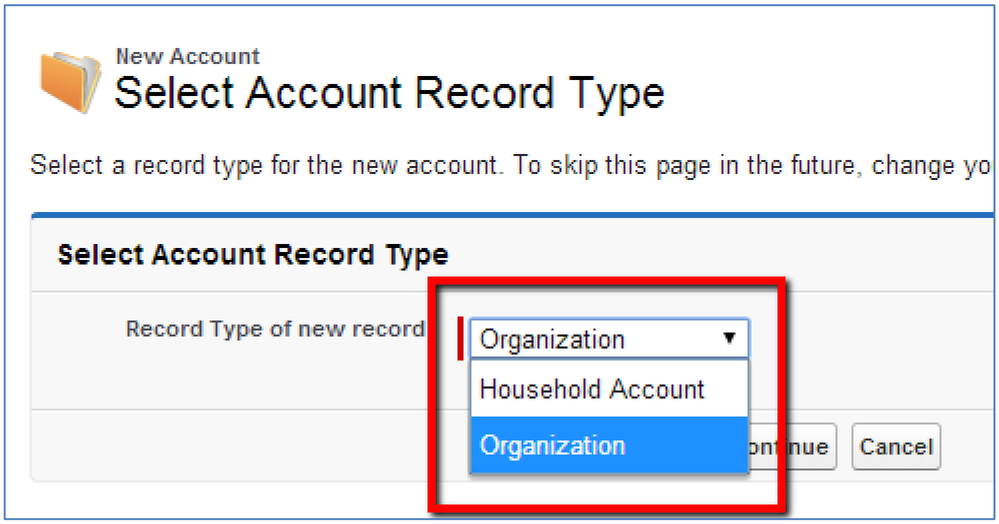
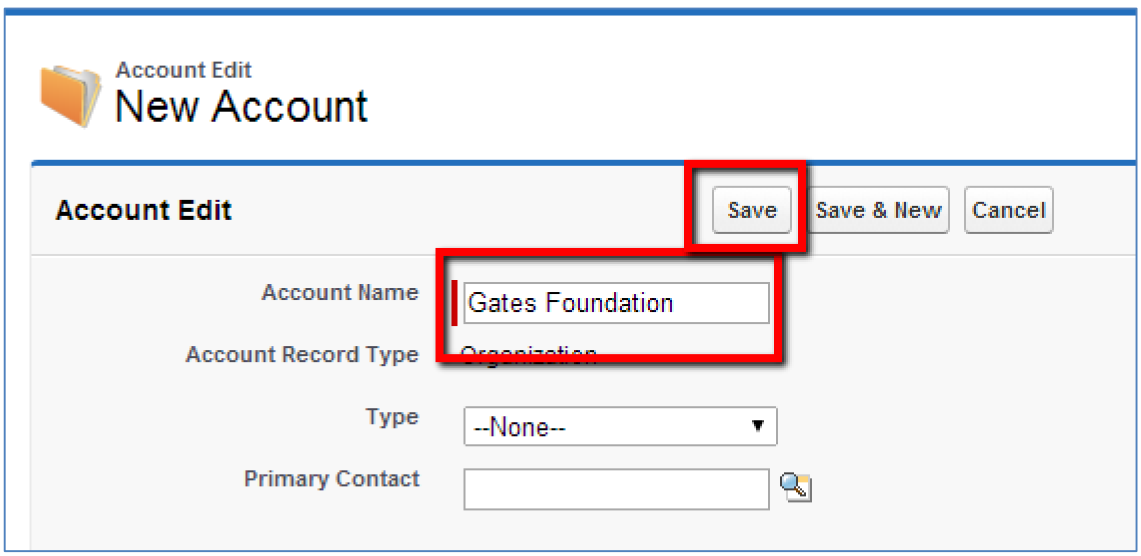
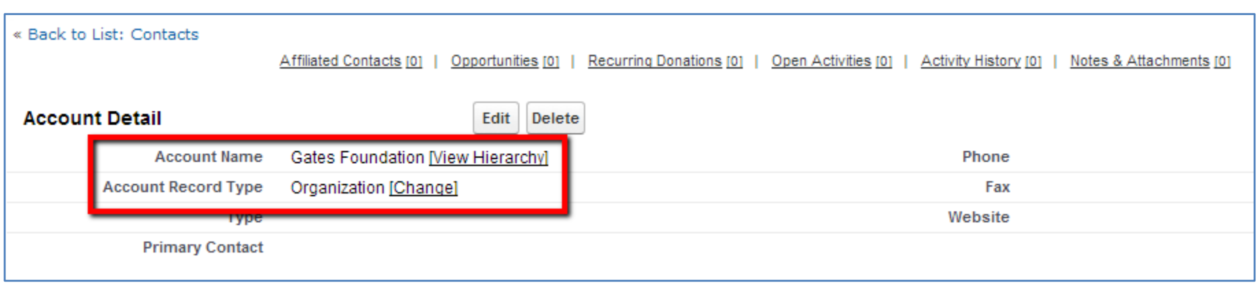
4) Select “Organization” for Record Type of new record



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

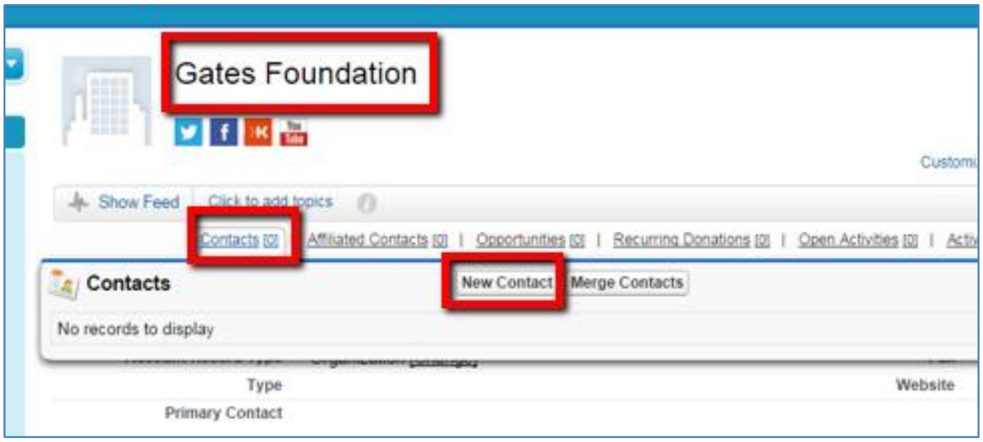


6) The saved record will look like this:

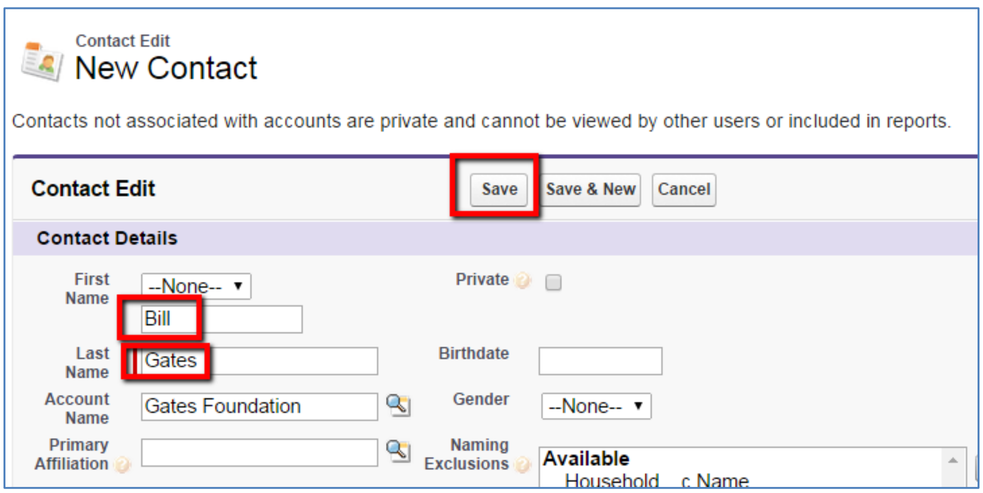


Create a Contact for "Bill Gates"

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"



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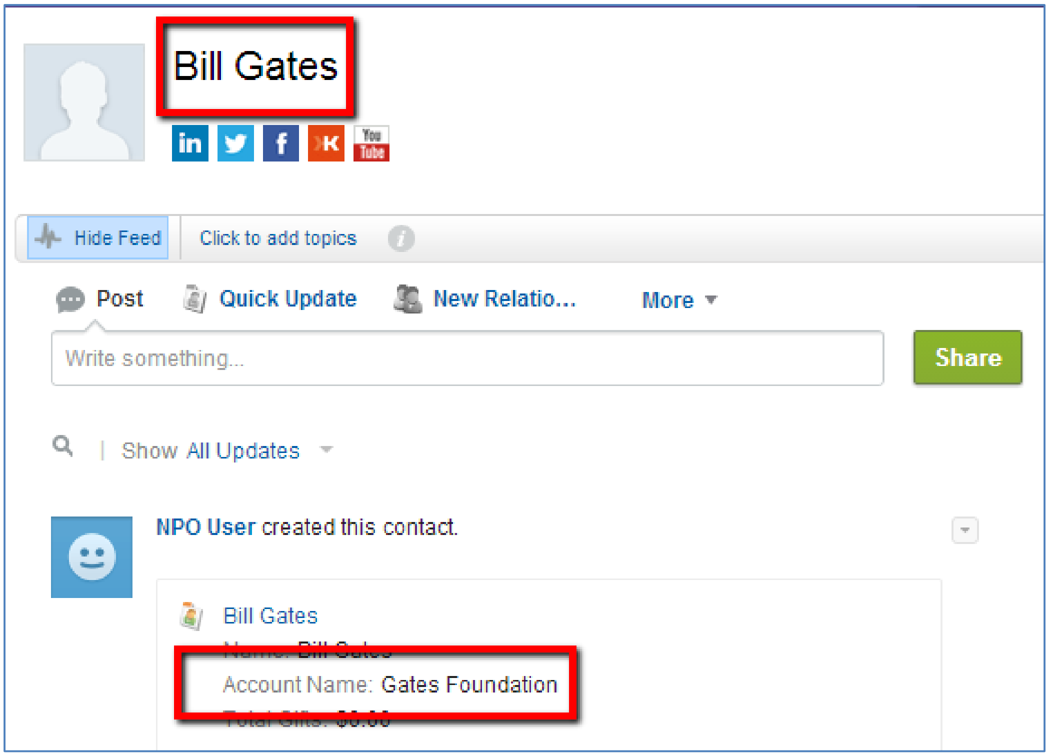
3) Your saved contact record will look like this:

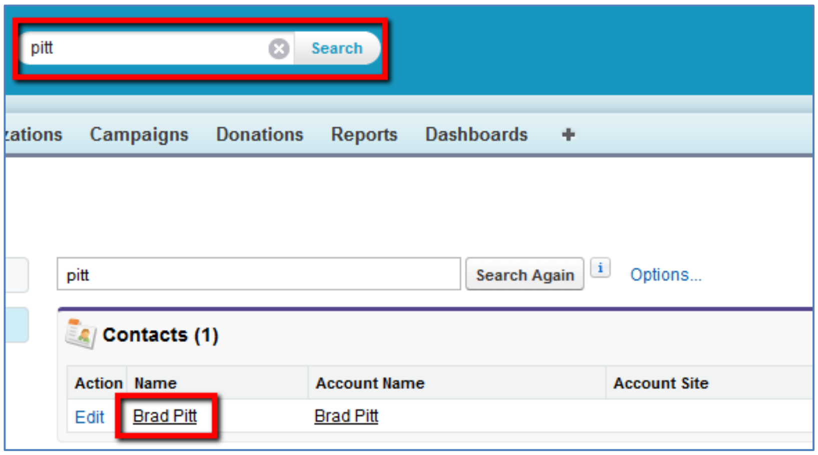


Now try your own! Create an Organizational record for your nonprofit and add yourself as an organizational contact.

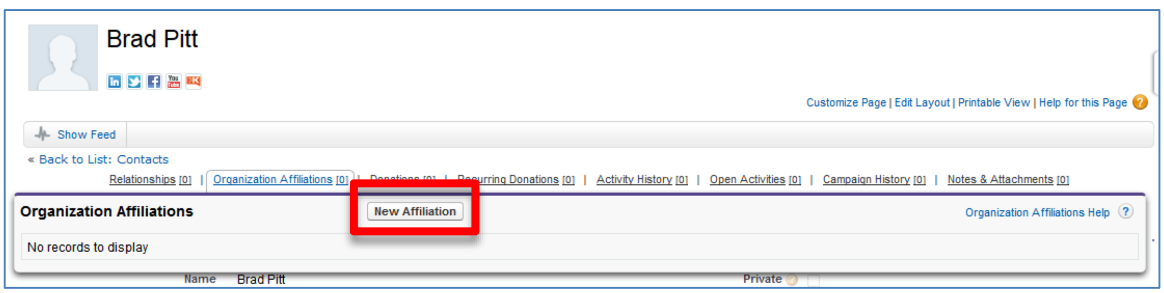
AFFILIATE AN INDIVIDUAL WITH AN ORGANIZATION

Affiliation: A connection between an individual contact and an organization

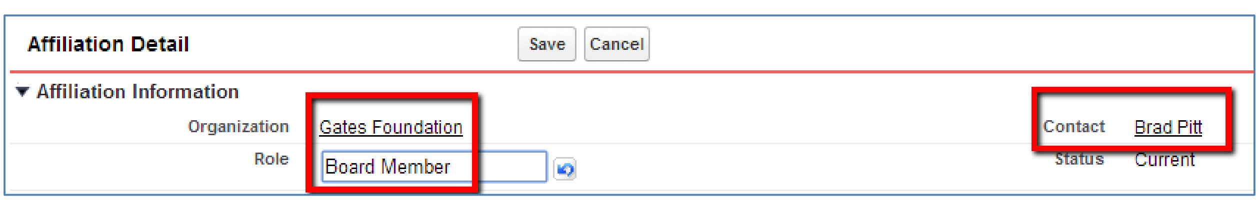
1. Connect Brad Pitt as a board member on the Gates Foundation
    1) Look up Brad Pitt in Search and choose Brad Pitt's contact record



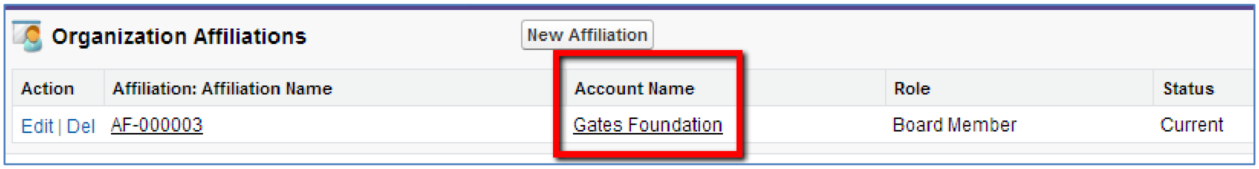
    2) Click "New Affiliation"



    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"



    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
Edit | Del	AF-000003	Gates Foundation	Board Member	Current

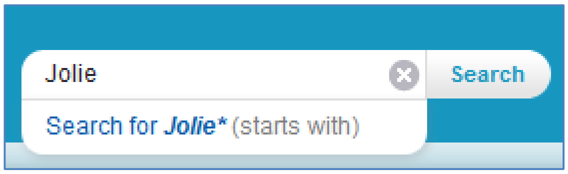
Now try your own! Connect your own record to an organization you are affiliated with (but are not your primary place of employment).

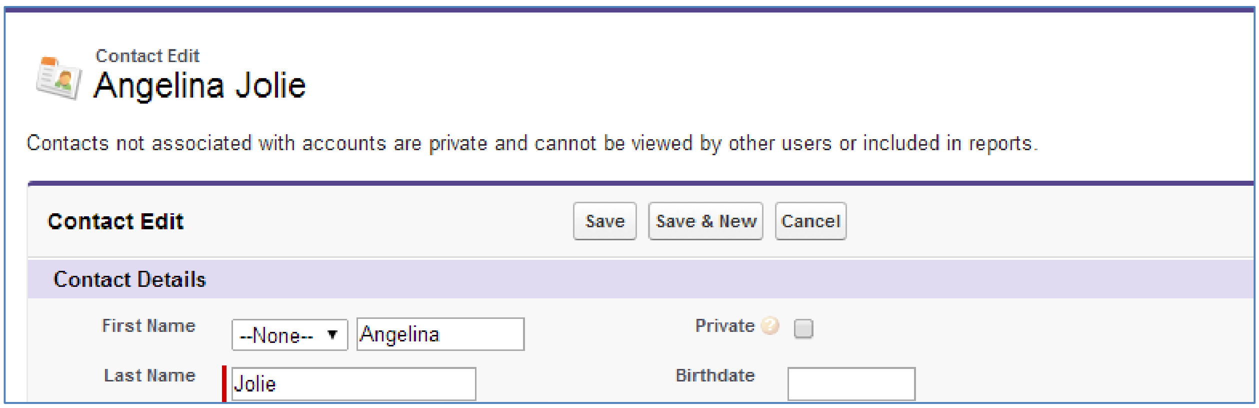
1) First create the Organization record
    a. Organization → New → Organization Account → Name of Org → Save
2) Then find your contact record in the Search bar
3) Create a new organizational affiliation & connect to the organization you created (Notice you will have 2 affiliations in your record: one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

ENTERING DONATIONS

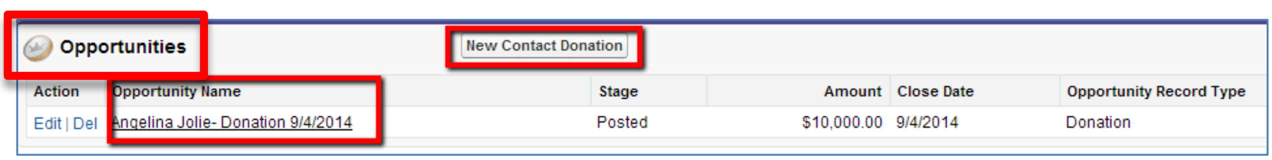
Exercise 1: Create an Individual Donation

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

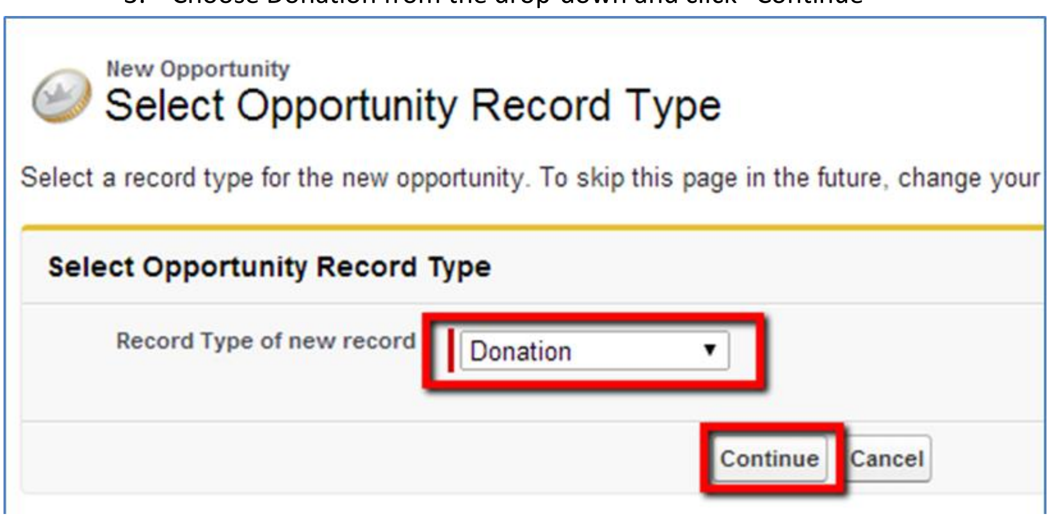




   2. Under "Opportunities," click "New Contact Donation"



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



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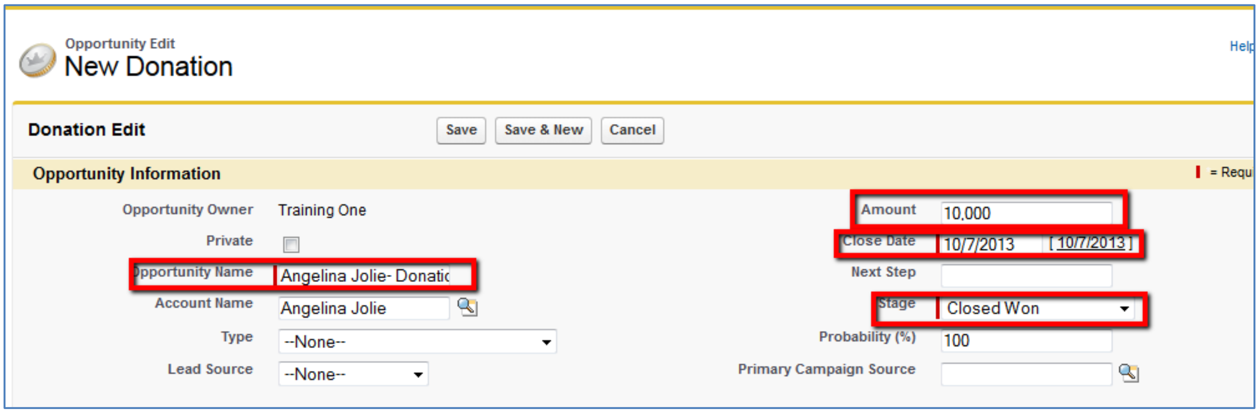
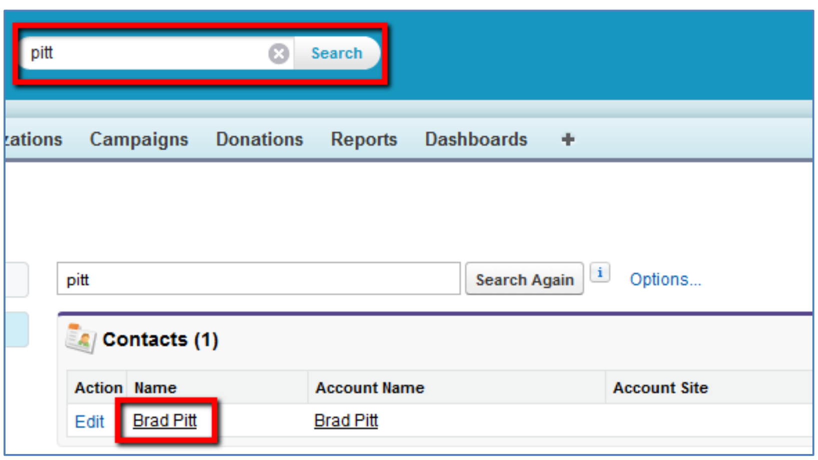
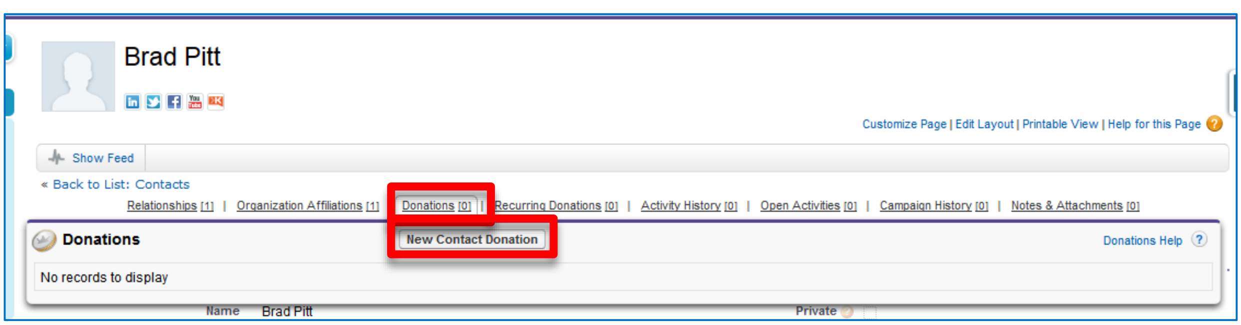
4. Opportunity Name will automatically populate with Name-Donation-Date
5. Enter Amount -$10,000
6. Close Date = Today
7. Stage = Closed Won



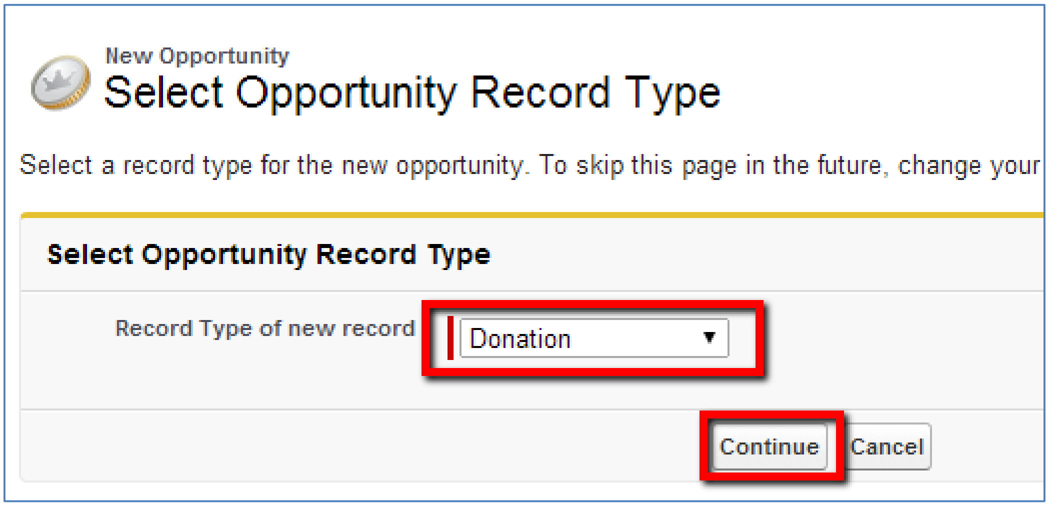
2) Brad makes a donation
1. Look up "Pitt" in Search and call up his record



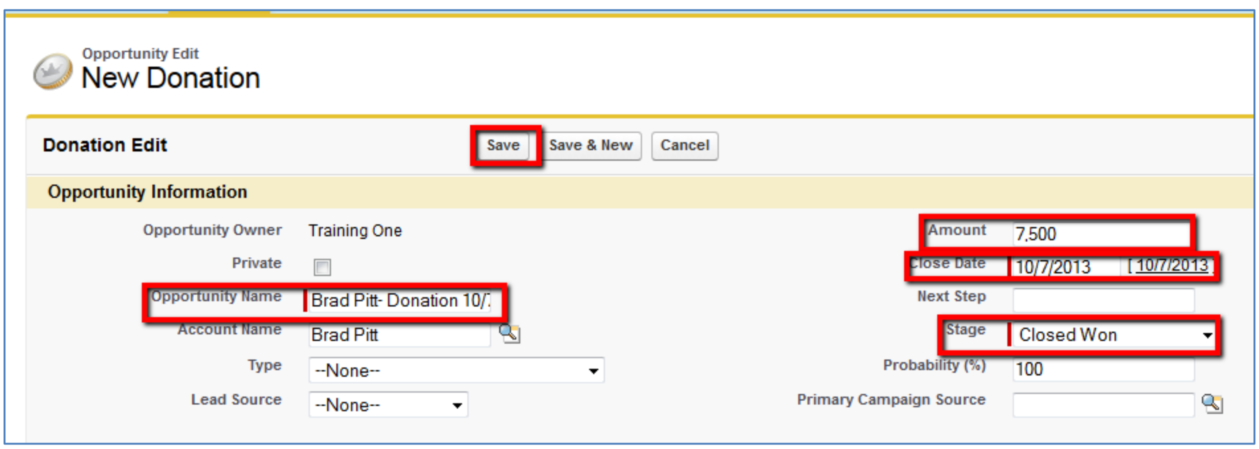
2. Hover over "Donations" link and choose "New Contact Donation"



3. Choose “Donation” in Dropdown menu



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



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 Edit Delete

Account Name	Pitt and Jolie Household [View Hierarchy]	Phone	
Primary Contact	Brad Pitt	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

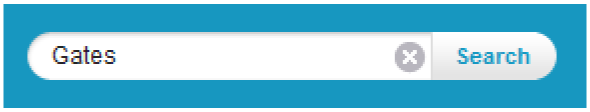
▼ Donation Totals

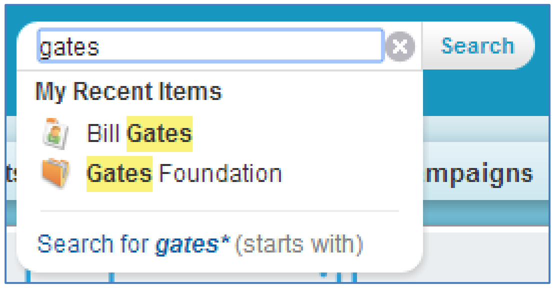
Total Gifts	$17,500.00	Total Number of Gifts	2
Total Gifts Last N Days	$17,500.00	Number of Gifts Last N Days	2
Total Gifts This Year	$17,500.00	Number of Gifts This Year	2
Total Gifts Last Year	$0.00	Number of Gifts Last Year	0
Total Gifts Two Years Ago	$0.00	Number of Gifts Two Years Ago	0

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

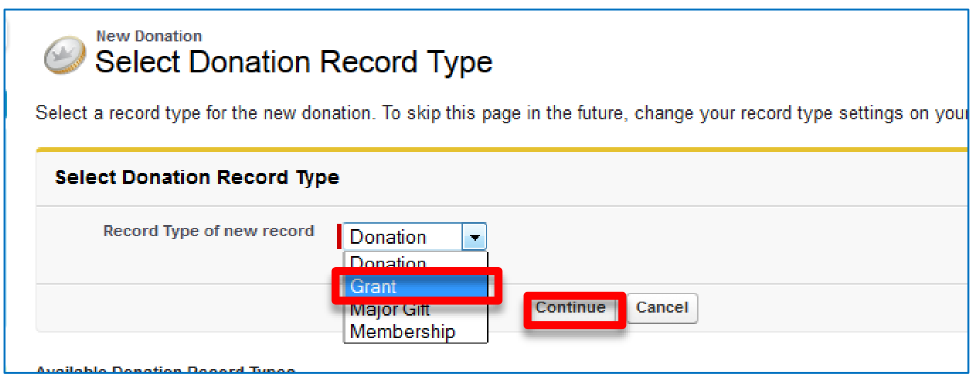
RECORDING A GRANT

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.

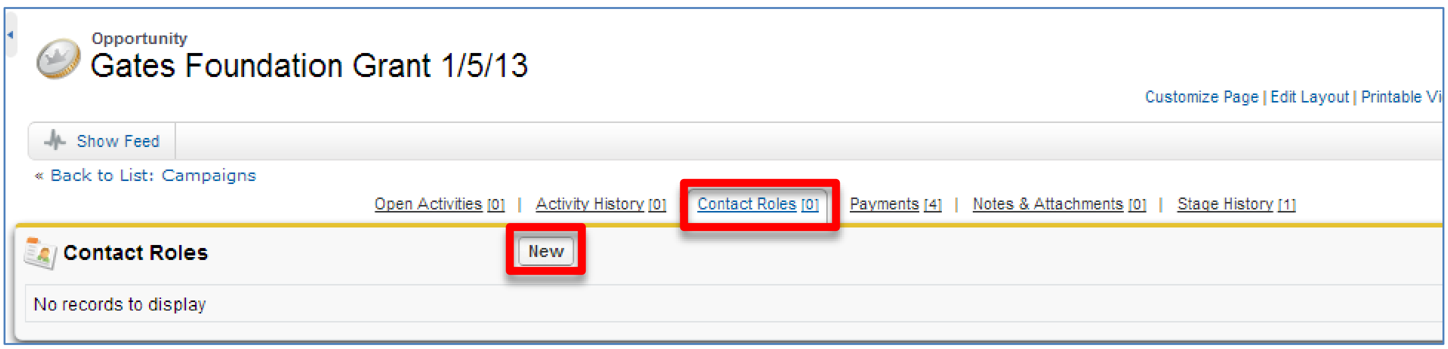
Important Note on Crediting Donations:

- 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).

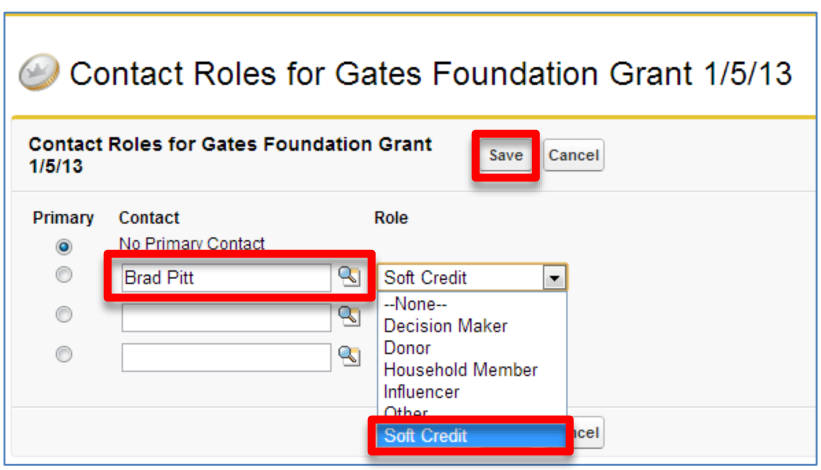
Give Soft Credit

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"



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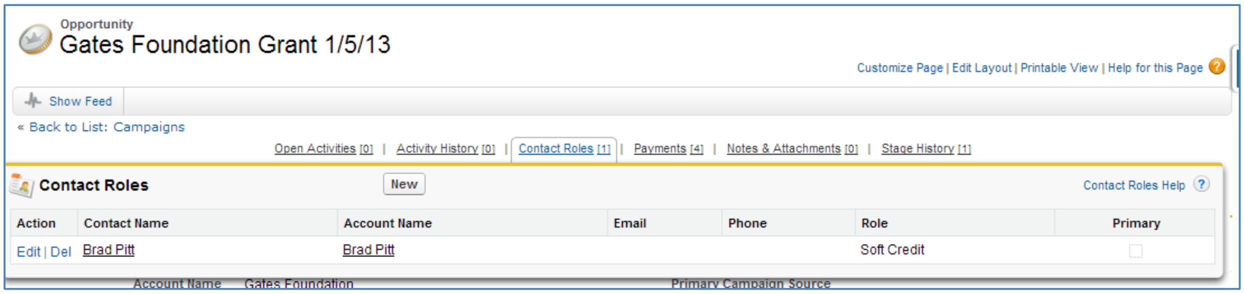
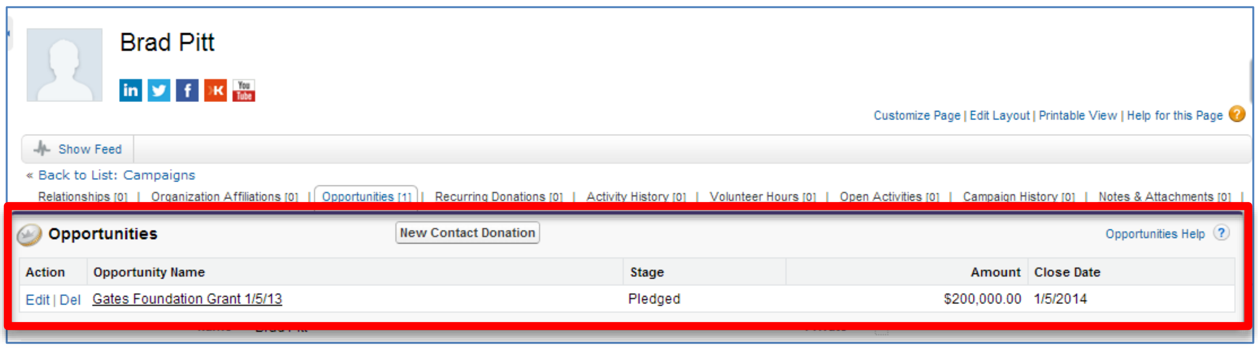
- Brad Pitt will be listed on the Opportunity Record as having a Soft Credit Role



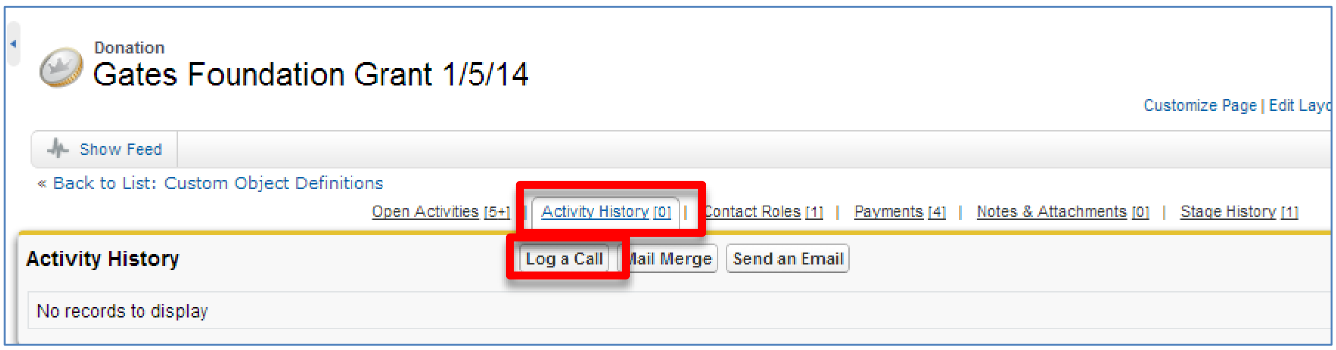
- The Soft Credit will also be captured in Brad Pitt's contact record as an Opportunity



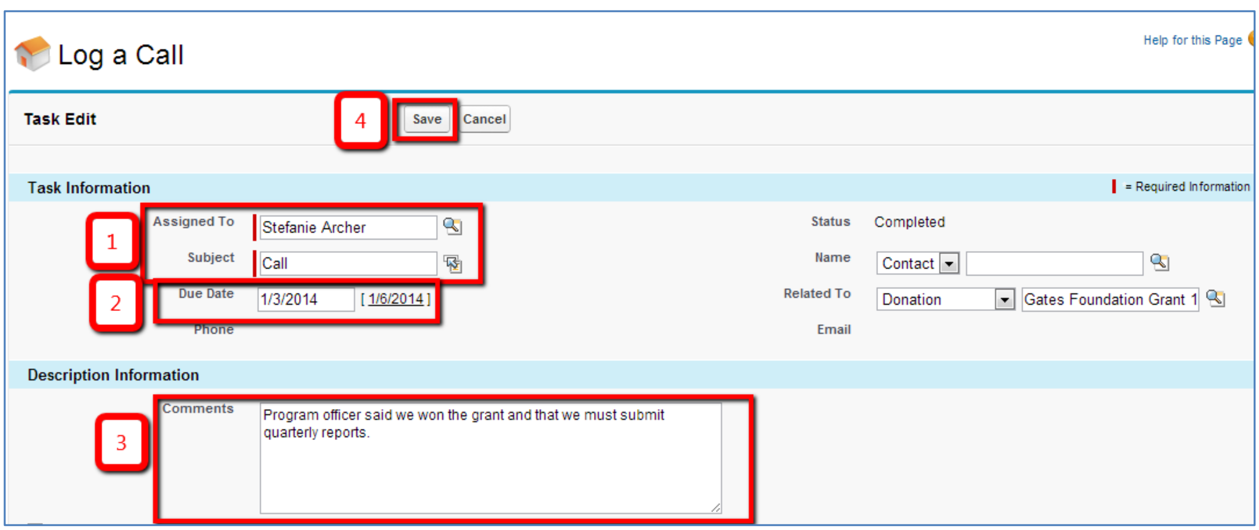
ACTIVITIES: LOGGING CALLS & CREATING RECURRING TASKS

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”

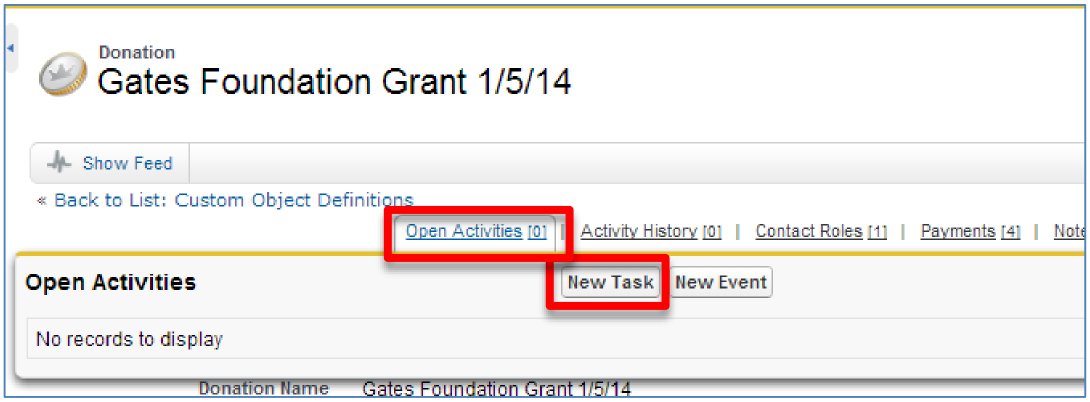


1) Your name and the subject “Call” will be automatically populated
2) Select the date of the call for the due date
3) Enter the specifics of the conversation in the Comments section
4) Click “Save” and the call will be saved to the appropriate record



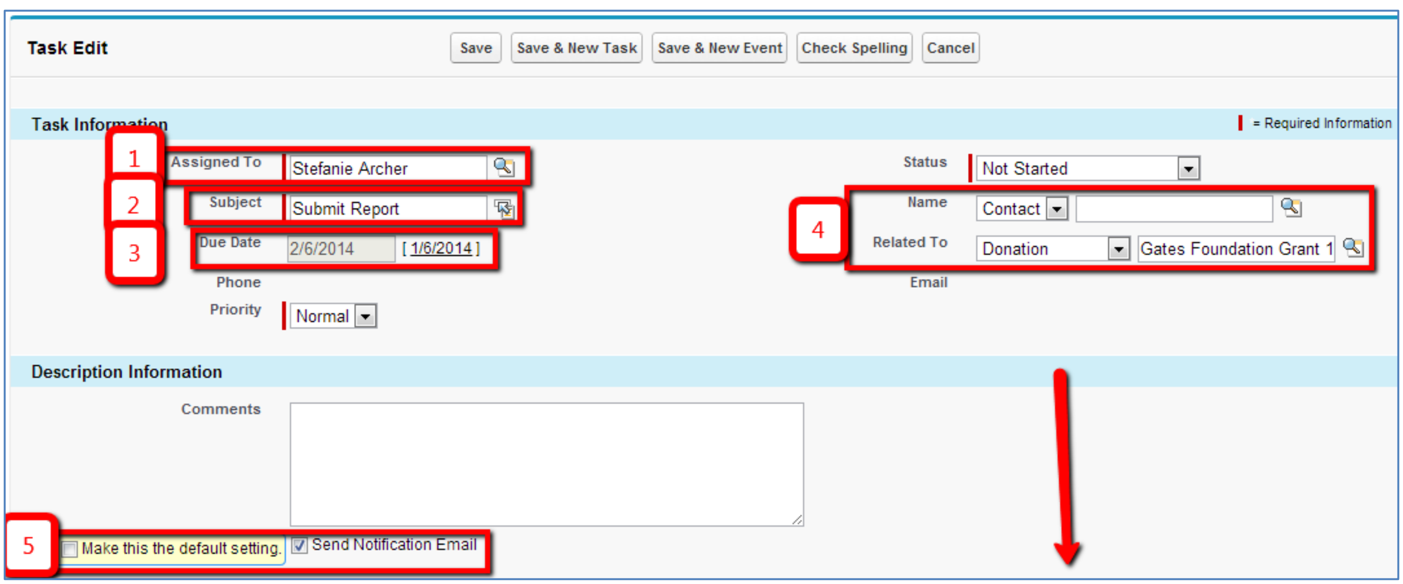
Exercise 2: Set up a task and reminder to submit a quarterly donor report
Go to the Opportunity record associated with the task (e.g., "Gates Grant")

- Hover over "Open Activities" and click "New Task"

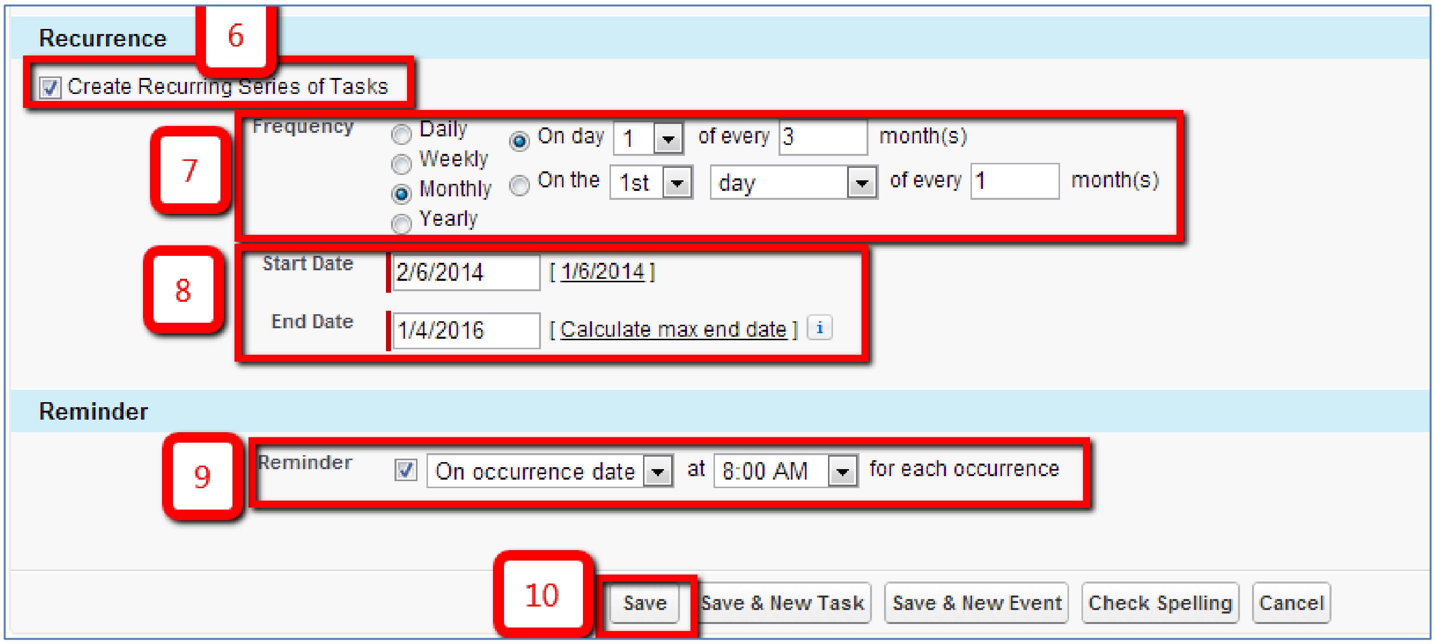


1) The task will automatically be assigned to the logged in user. If you want to reassign it to another Salesforce user, you can use the lookup icon.
2) For Subject, enter task name
3) Enter the due date for the first report
4) The opportunity will be automatically populated by going through the opportunity 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)

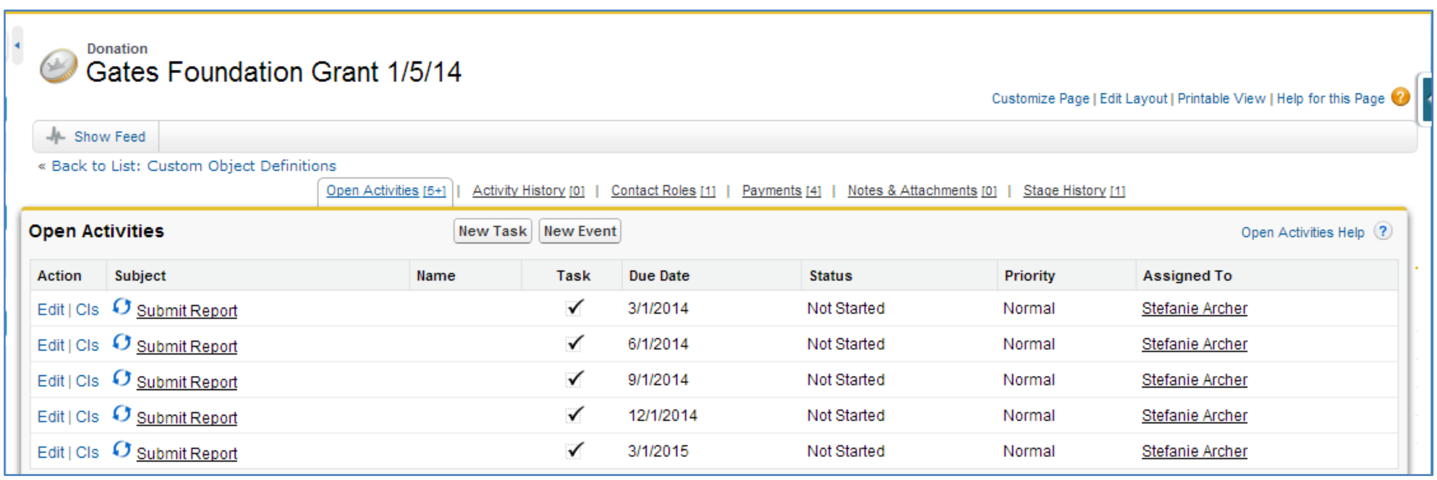
Scroll down to add the recurring schedule



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”

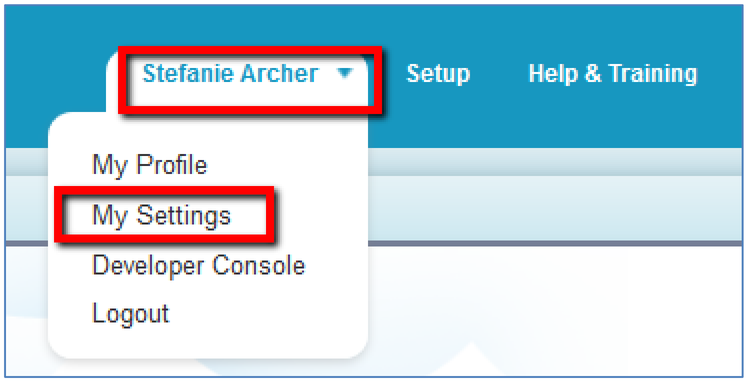


- The tasks will automatically be added to the Opportunity record and a reminder will be sent at the date/time specified

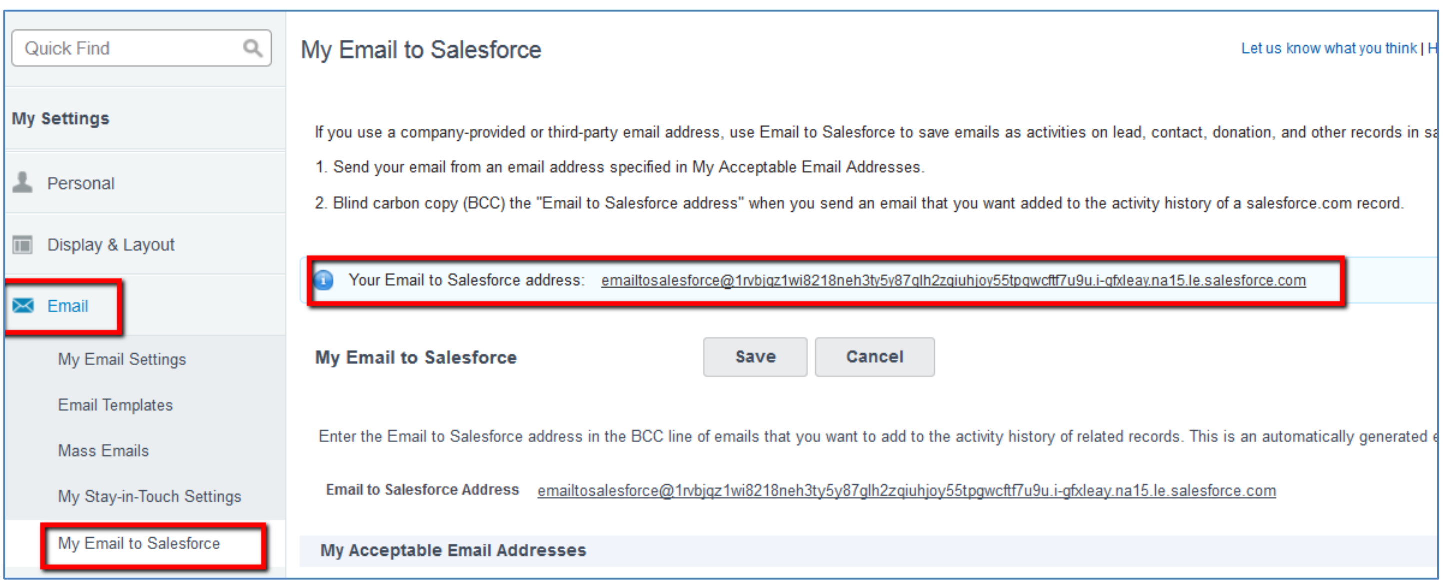


Email directly into Salesforce using your unique BCC: email

1. Go into User Name→ My Settings



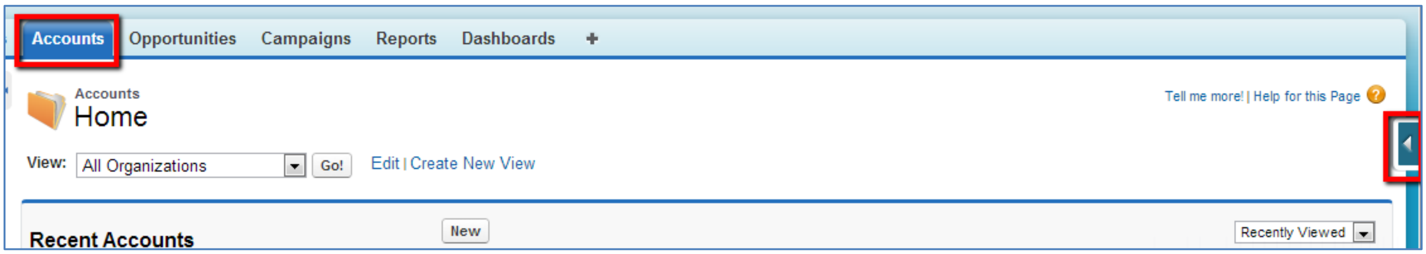
2. Choose Email→ My Email to Salesforce
   The email address listed in this page is your unique email. Use this address in the BCC: field of an email that you want to attach to a contact, and it will automatically attach to the contact record connected to the recipients email address.



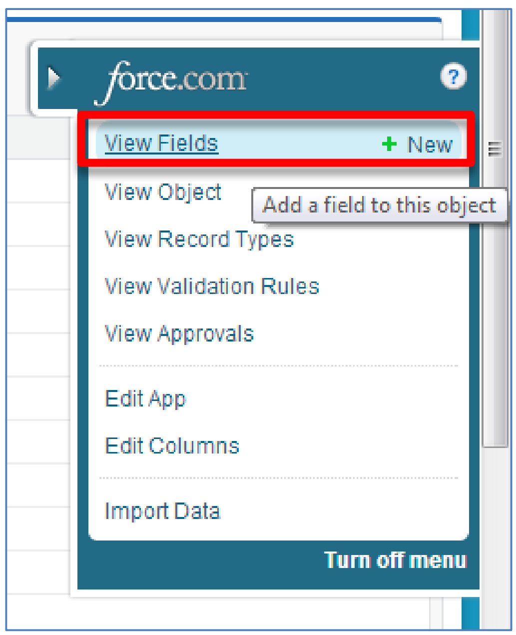
CUSTOMIZING SALESFORCE

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)

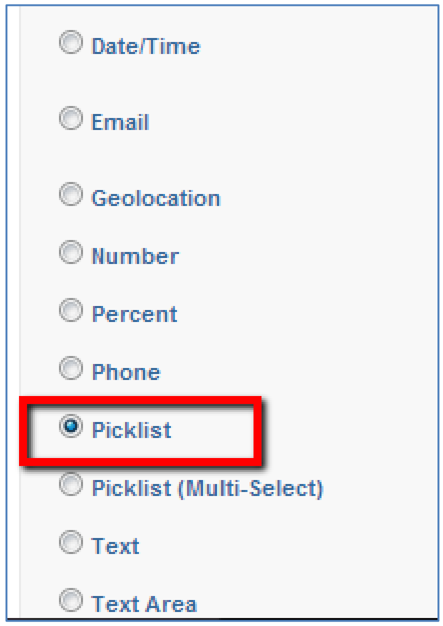


- Hover over “View Fields” and click “+ New”



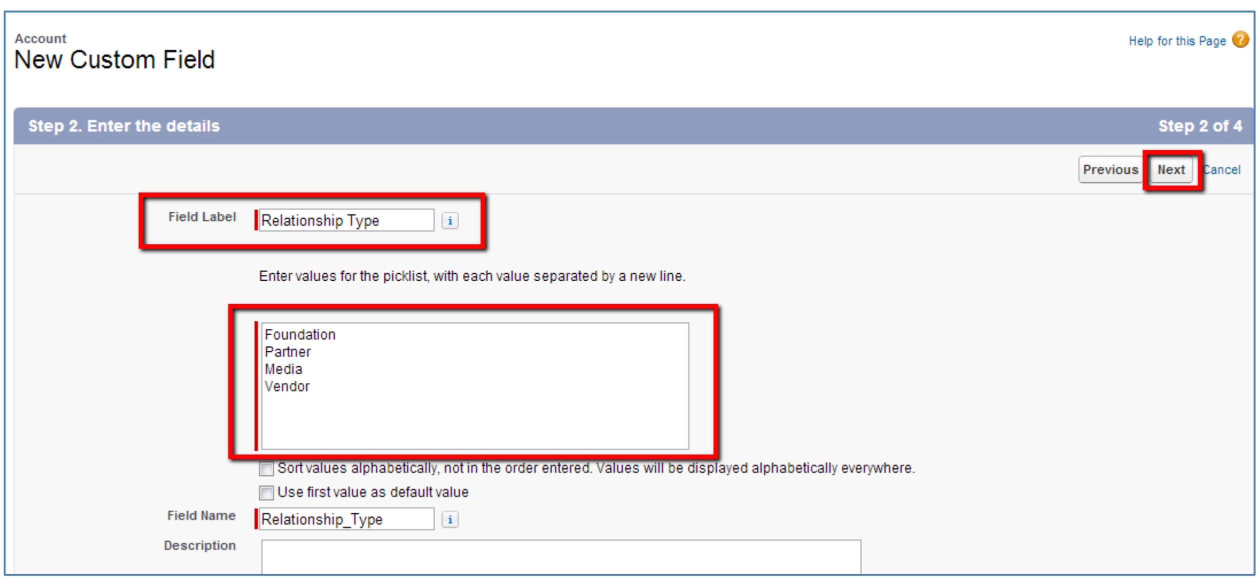
- Select the Data Type
- For this field, we will choose “Picklist”

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

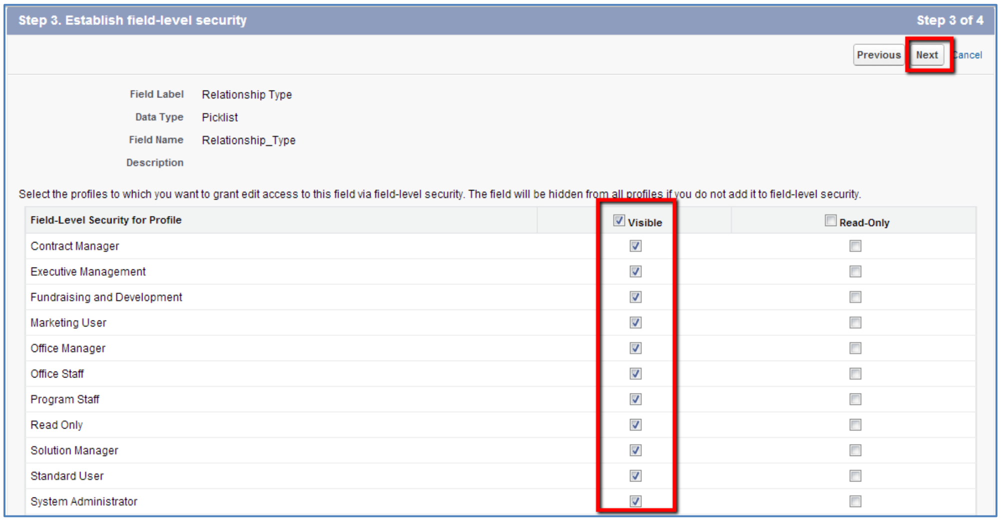


Field Label: Relationship Type

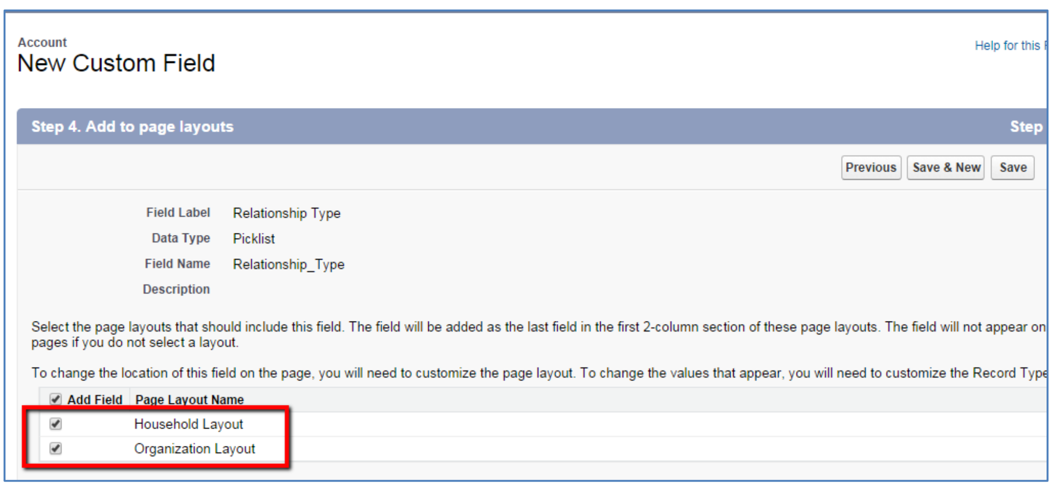
- Enter each relationship type on a new line: Foundation, Partner, Media, Vendor
- Click “Next”



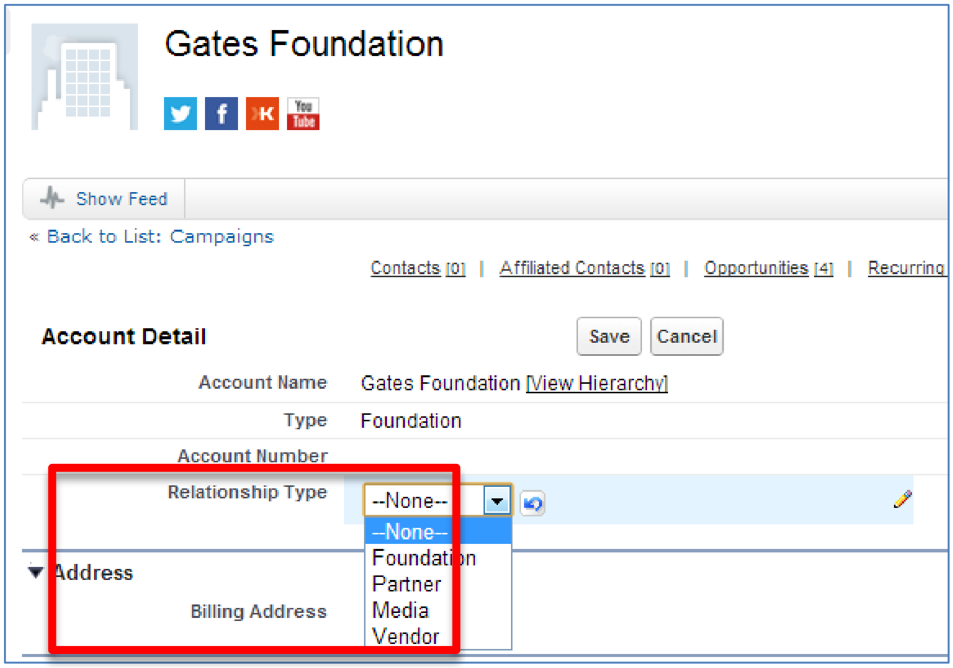
- Select the proper field-level security, which specifies who can edit (“Visible”) vs Read-Only
- Keep the default of Visible to every user profile
- Click “Next”



- 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"



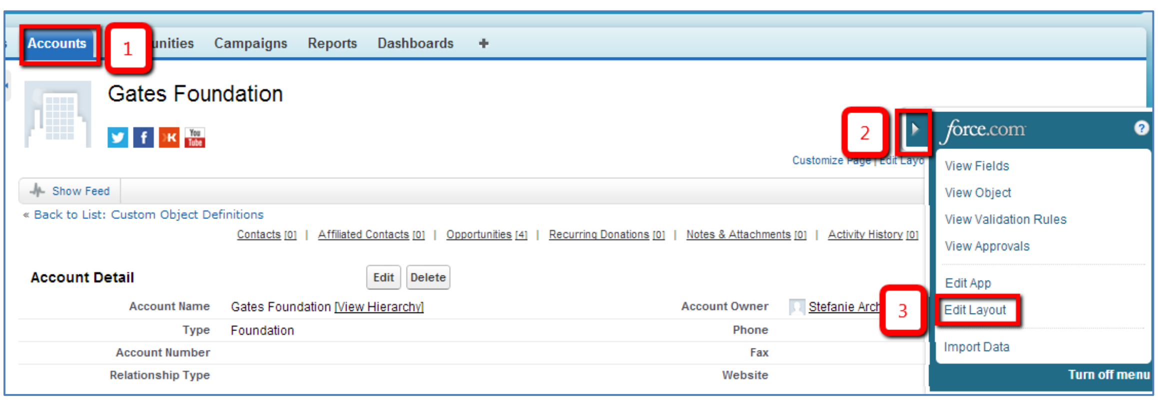
- To see your changes, go into the "Gates Foundation" Account record and find your new field



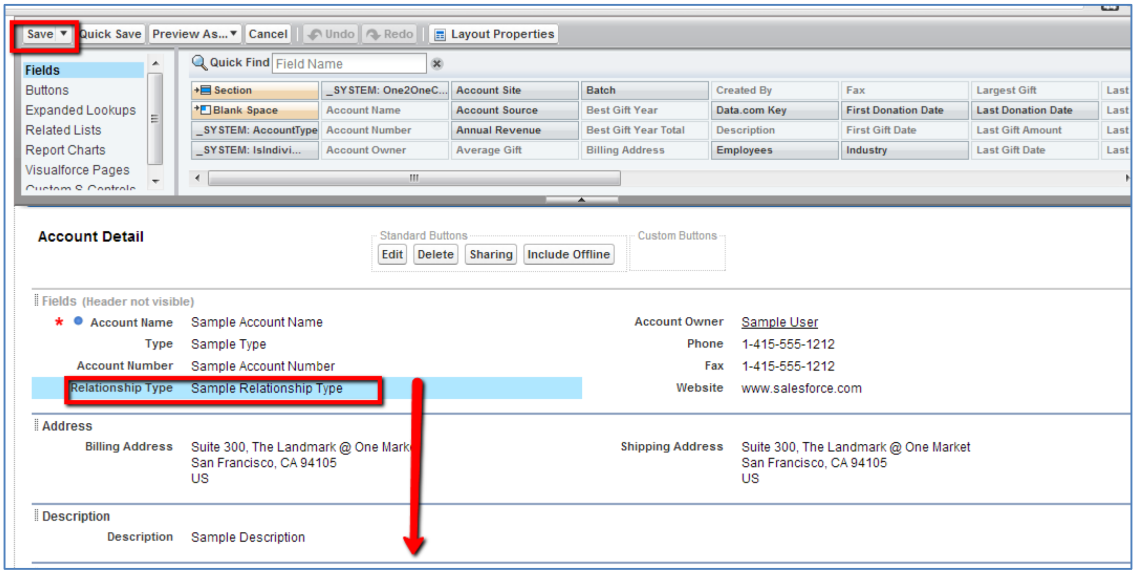
Edit Page Layouts

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"

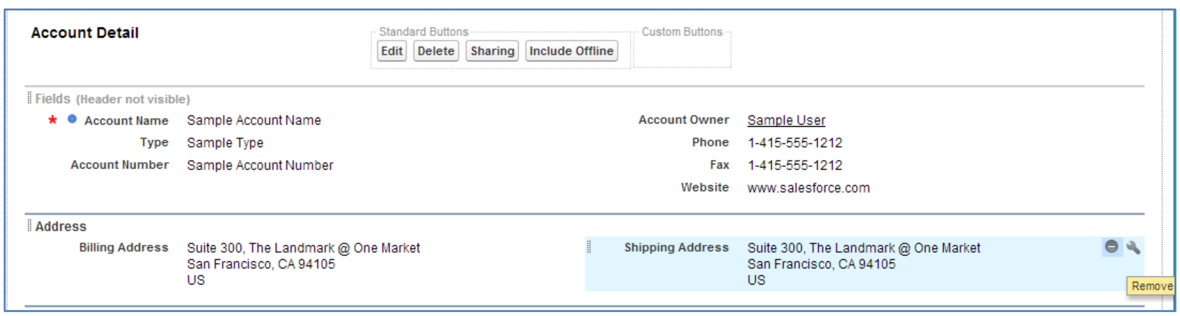


- Click and hold on the "Relationship Type" field and drag and drop it in the Description section



2.2 Remove “Shipping Address” from the Page Layout

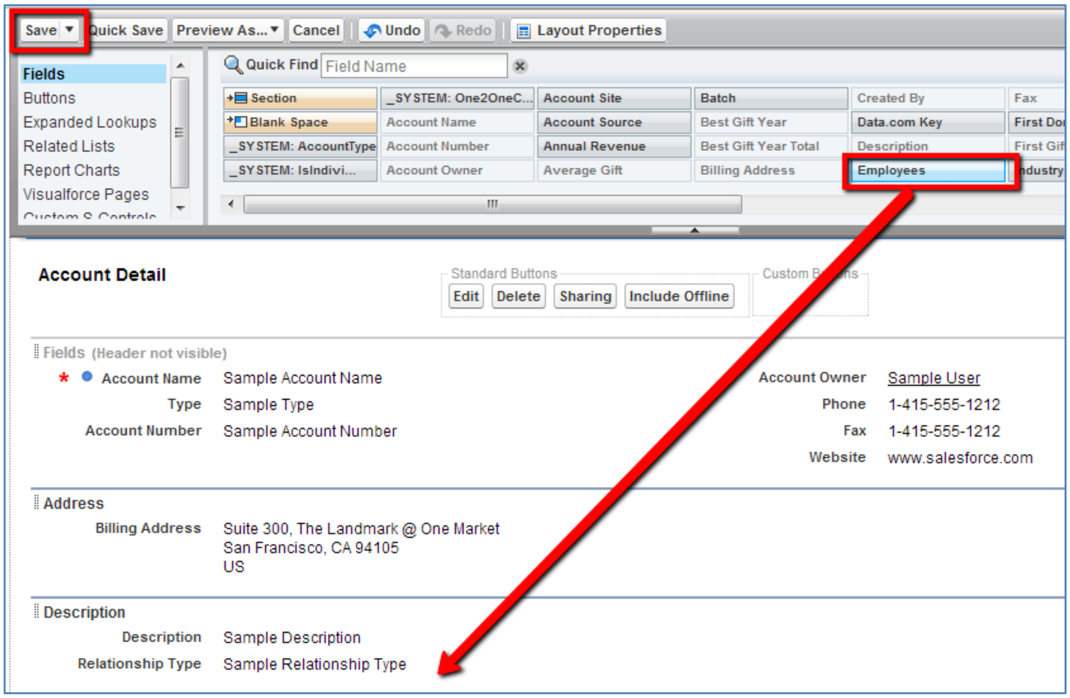
- Hover over the Shipping Address field and click the “-“ icon



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

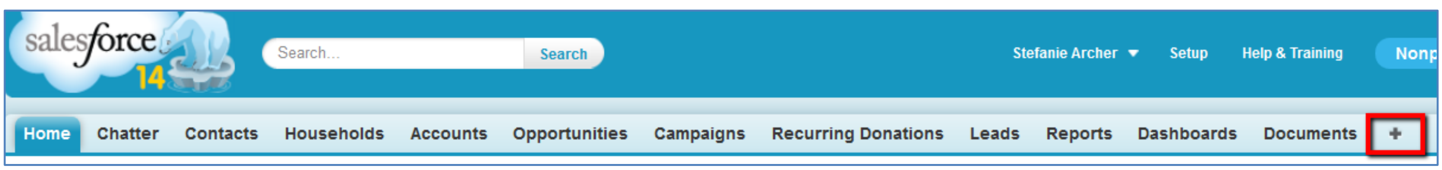
- Click and hold the “Employees” field in the top box
- Drag and drop it into the “Description” section

- Click “Save”

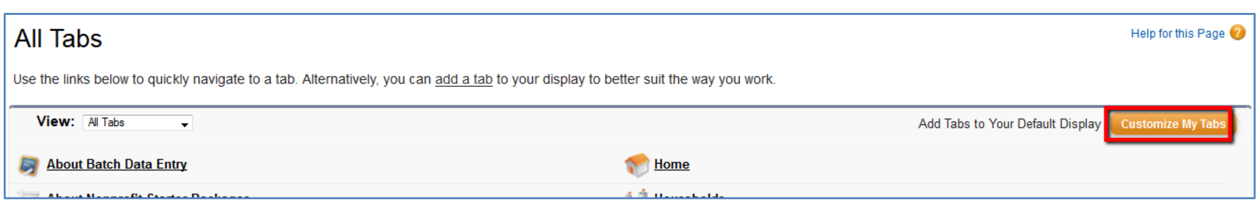


Customize Tabs

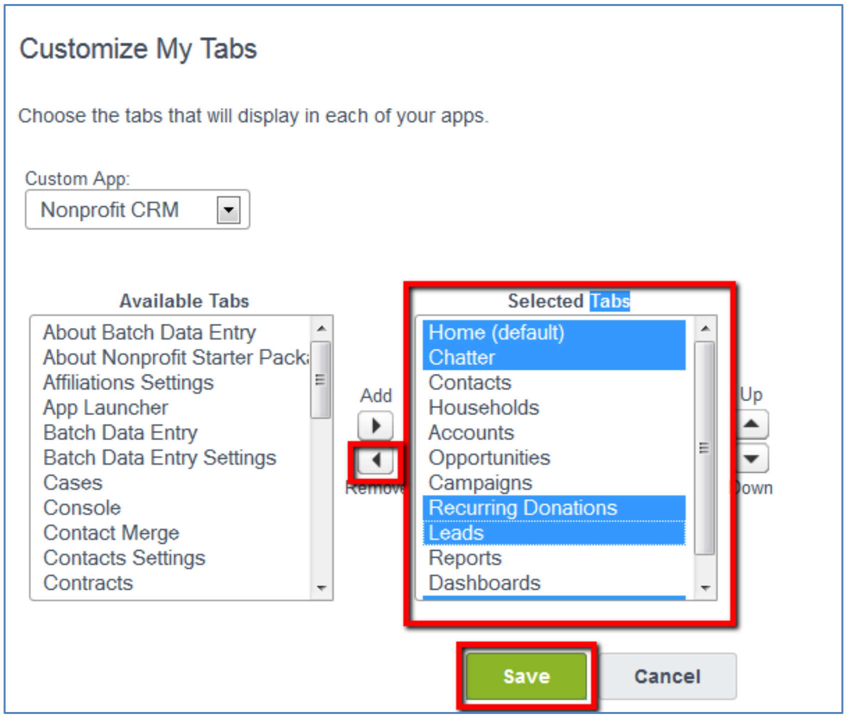
1) Click on the “+” sign at the end of the tabs



2) Choose the button “Customize My Tabs”



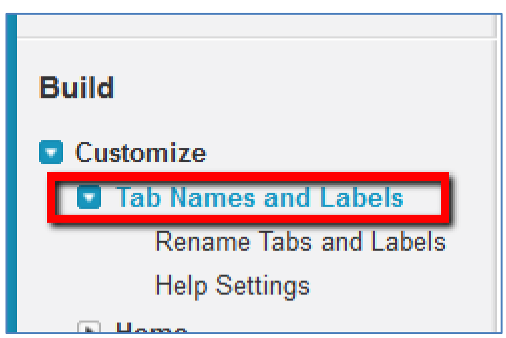
3) Select the following tabs to remove: Home, Chatter, Recurring Donations, Leads, and Documents
Click "Save"



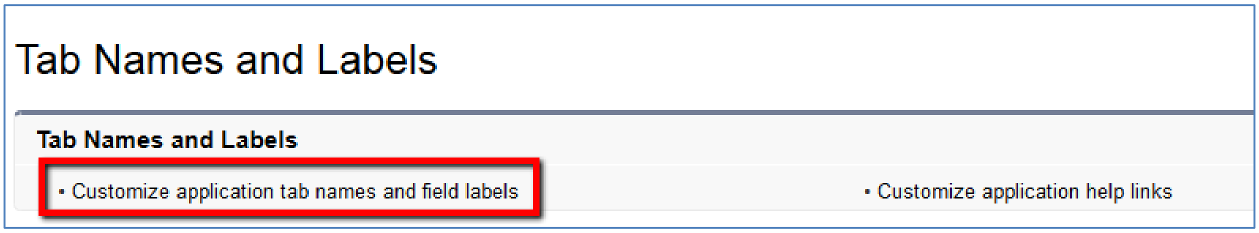
Rename "Account" and "Opportunity" Tabs

1) Go into Setup

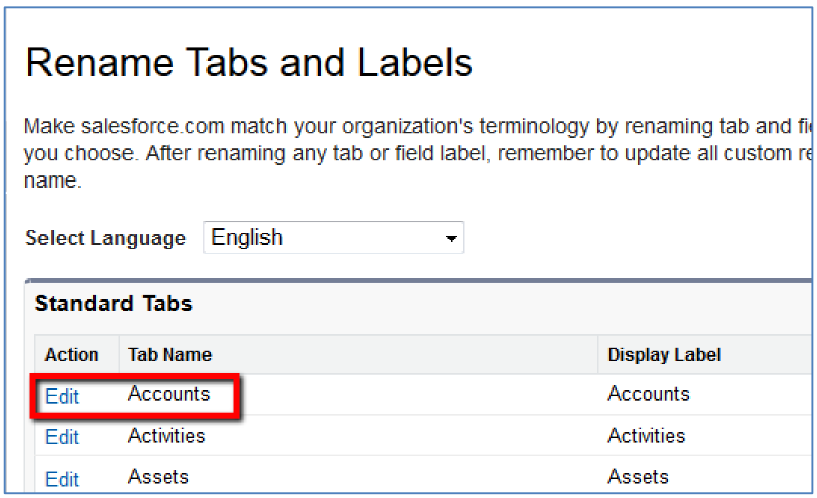
2) Choose Build → Customize → Tab Names and Labels



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

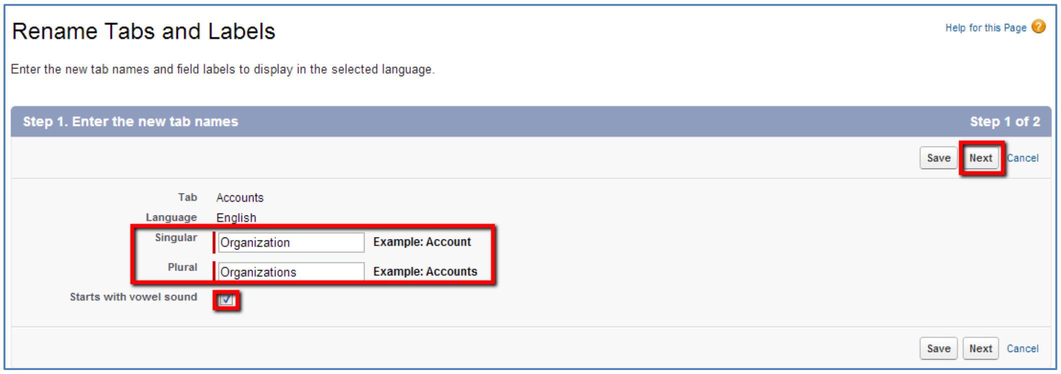


4) Click “Edit” next to “Accounts”

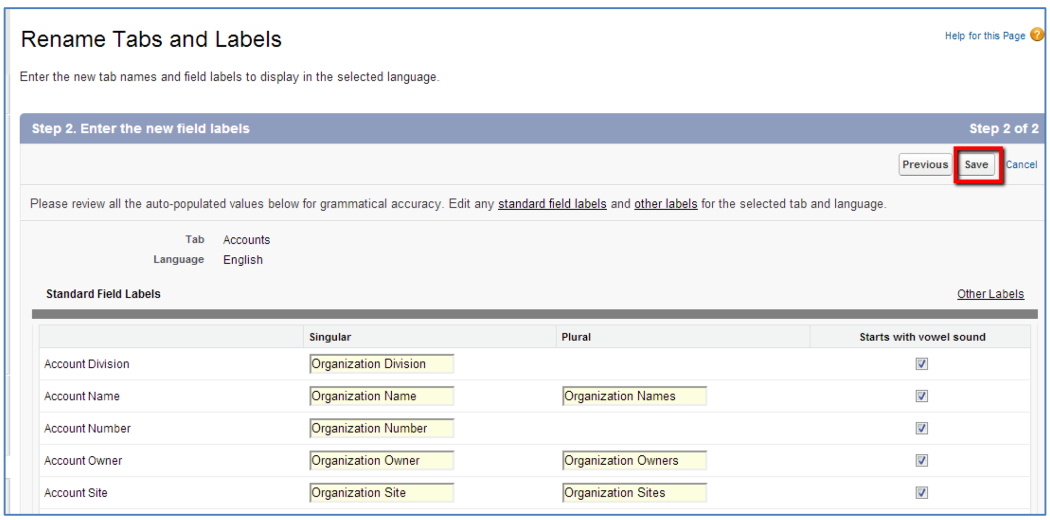


- Rename “Account” to “Organization” and “Accounts” to “Organizations”

- Keep "Starts with a vowel" checkbox checked
- Click "Next"



- Click "Save" to apply the new name to associated fields



- 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

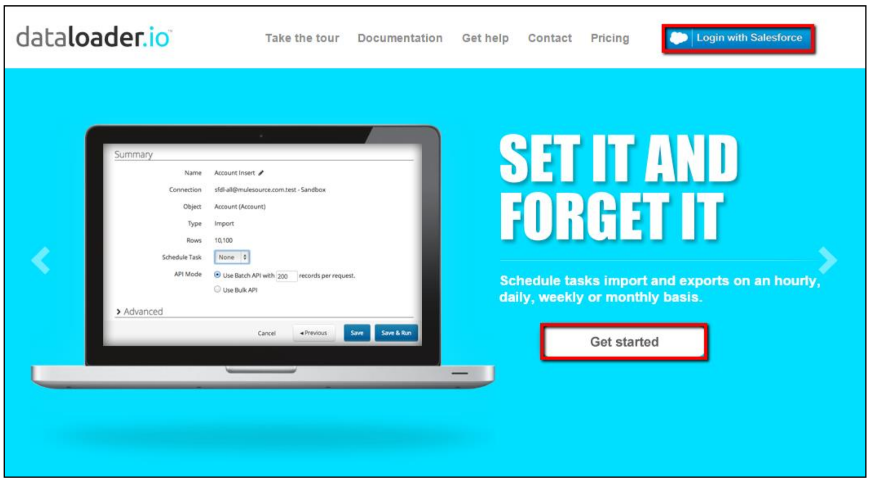
MIGRATING CONTACT DATA TO SALESFORCE

"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.

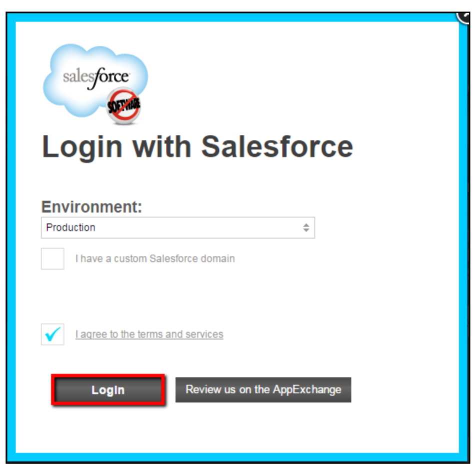
Opening DataLoader.io

Open the Salesforce instance you want to work with

1. Open a new window in your browser. Type www.dataloader.io. The following window will open:

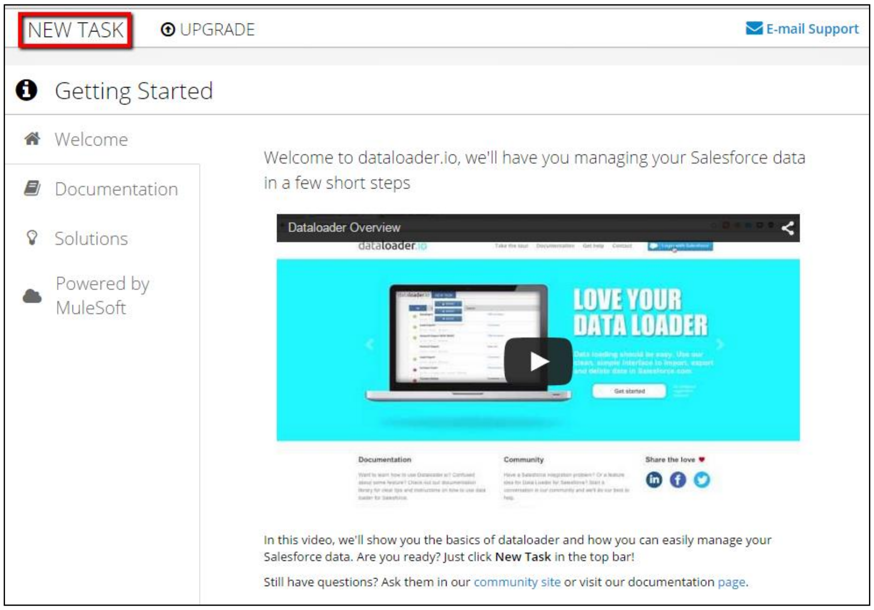


2. Click Login with Salesforce
3. Dataloader will ask permission to access your data. Click Allow

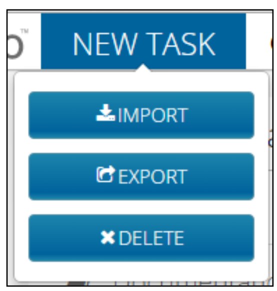


4. Click "Login"

5. This screen will appear. Click "New Task"



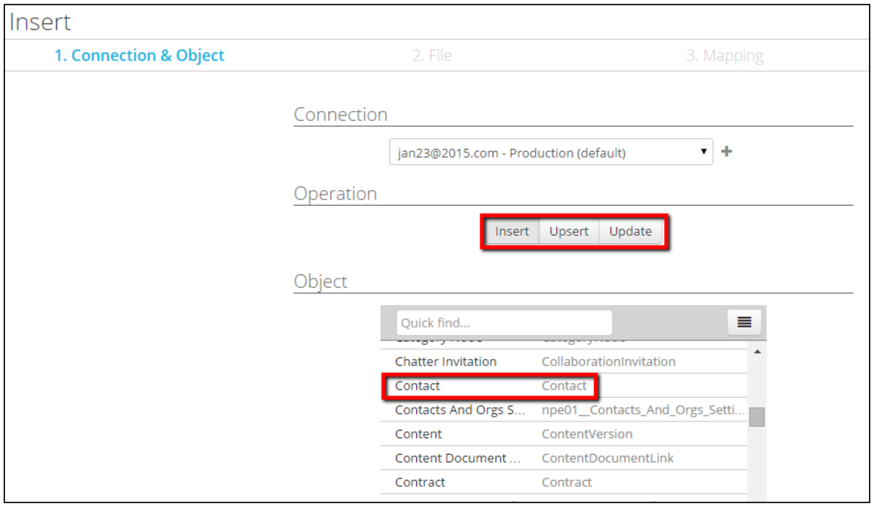
6. Specify the task: Click "Import"



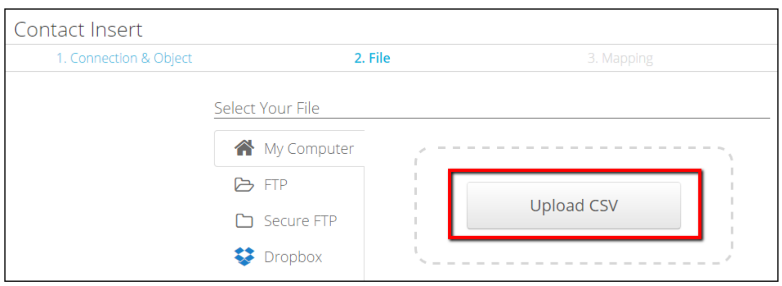
7. When this screen appears, click "Insert"
8. Dataloader.io and other tools permit three ways to import data.

- **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

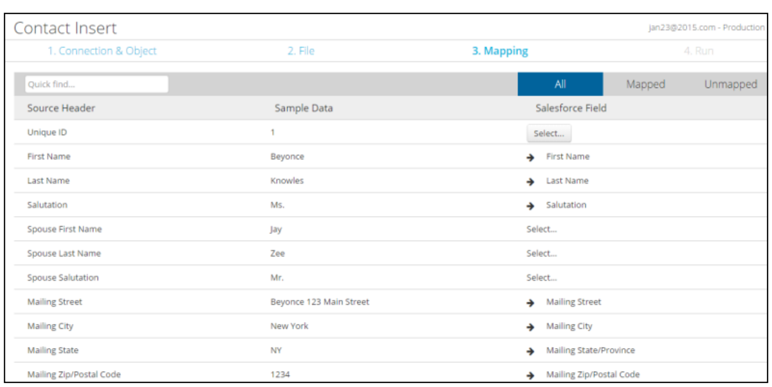
Select the Salesforce object into which you will be migrating the data (in this case, Contact)



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

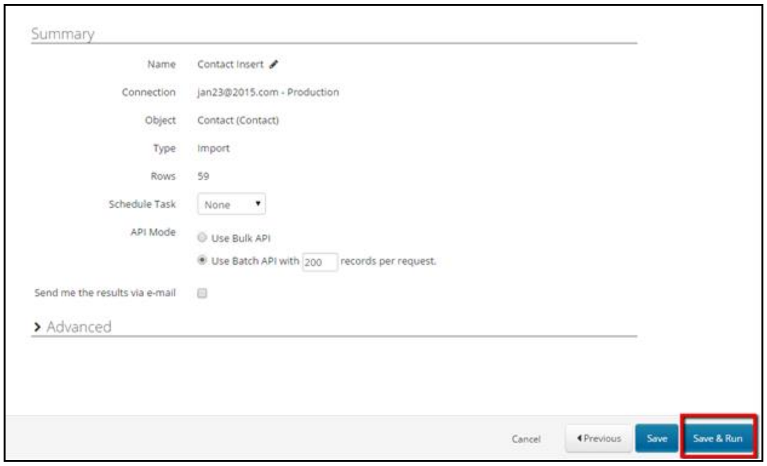


11. Dataloader.io will map the fields from the csv file with the Salesforce fields, assuming they have the same names. **Make sure that you have created any necessary custom fields in Salesforce before you undertake this step**

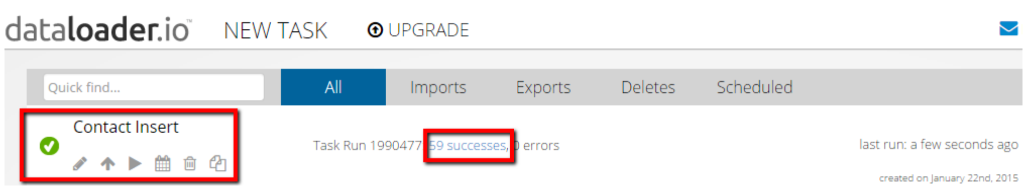


12. Any fields that don't match can be matched manually by using the "Select" button.

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

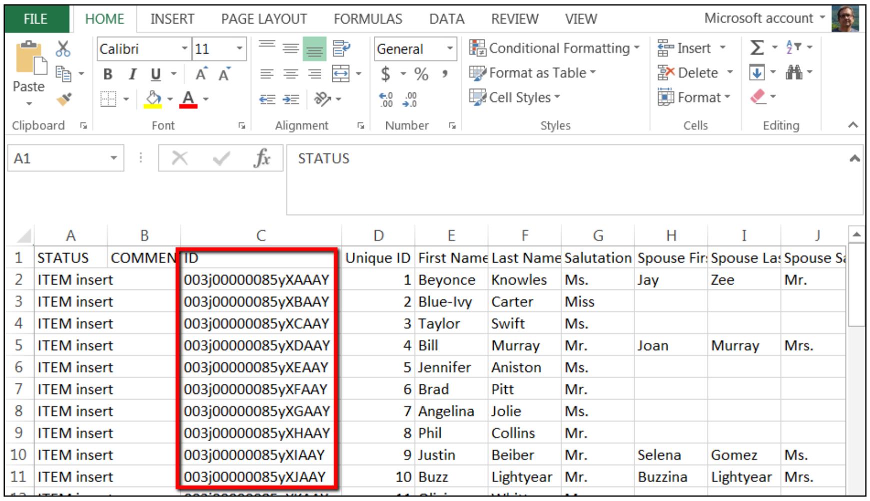


15. Click Save and Run
16. Before the records are actually migrated, the Data Loader will give you a scary warning. Click Yes
17. When the Data Loader has finished, it will confirm that the Insert is successful (Green checkmark appears).
18. If it is not successful, it will show a red X
19. Click “View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



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.



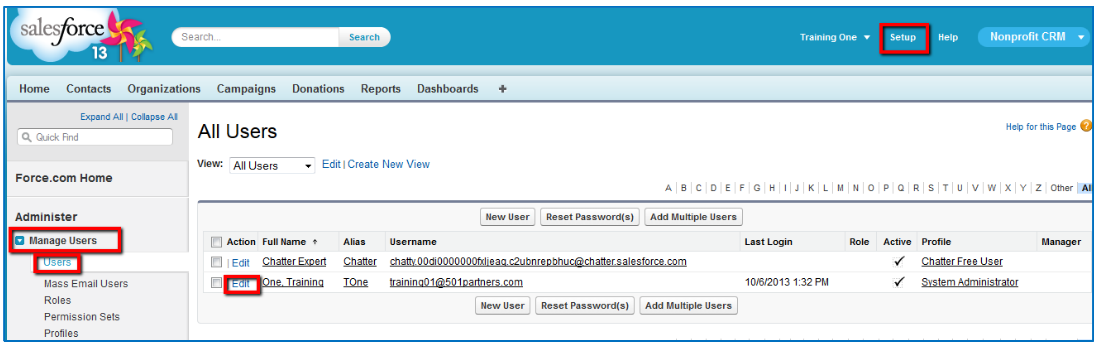
	A	B	C	D	E	F	G	H	I	J
1	STATUS	COMMEN	ID	Unique ID	First Name	Last Name	Salutation	Spouse Fir	Spouse La	Spouse Sa
2	ITEM insert		003j00000085yXAAAY	1	Beyonce	Knowles	Ms.	Jay	Zee	Mr.
3	ITEM insert		003j00000085yXBAAY	2	Blue-Ivy	Carter	Miss			
4	ITEM insert		003j00000085yXCAAY	3	Taylor	Swift	Ms.			
5	ITEM insert		003j00000085yXDAAY	4	Bill	Murray	Mr.	Joan	Murray	Mrs.
6	ITEM insert		003j00000085yXEAAY	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

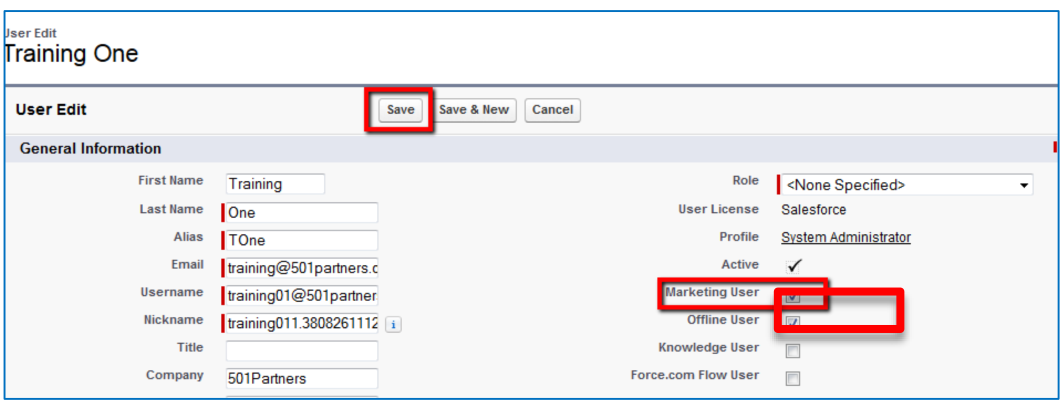
Set up special permissions to be a Marketing User

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"



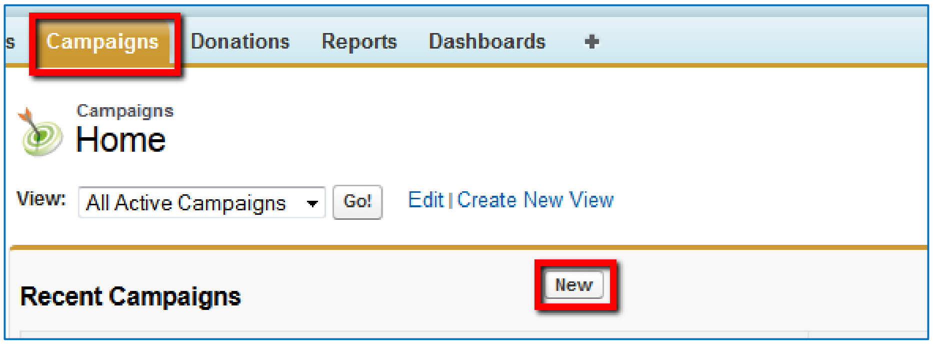
3. Make sure "Marketing User" and "Active" is checked and click "Save"



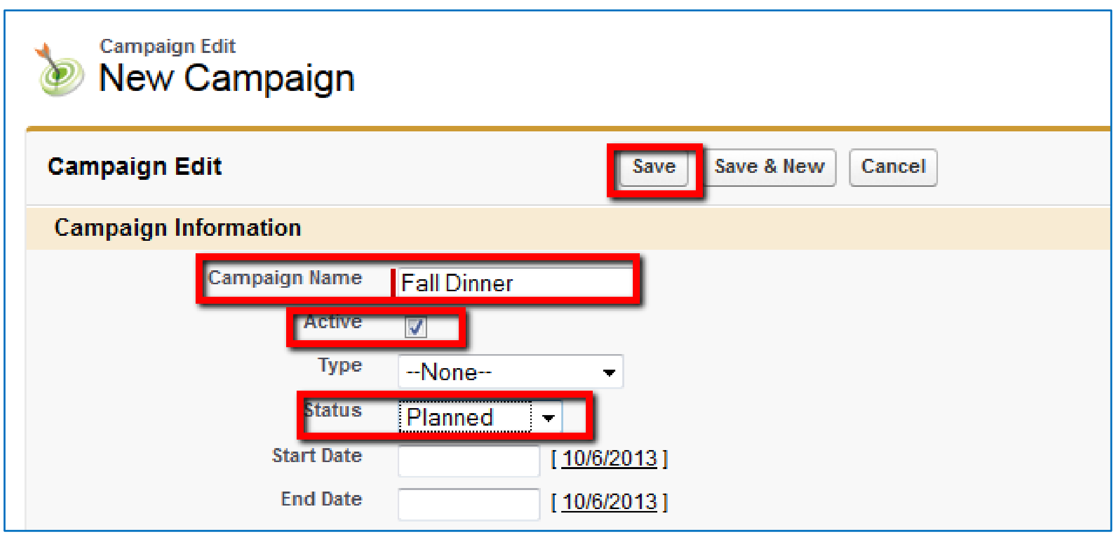
Revised February 2016

Exercise 1: Set up Campaign for Fall Dinner

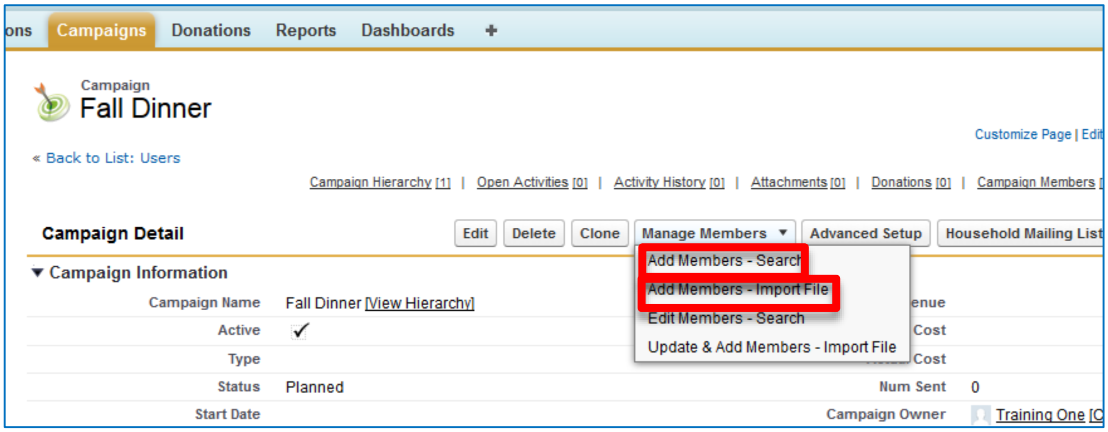
1. Go to Campaigns tab and click "New"



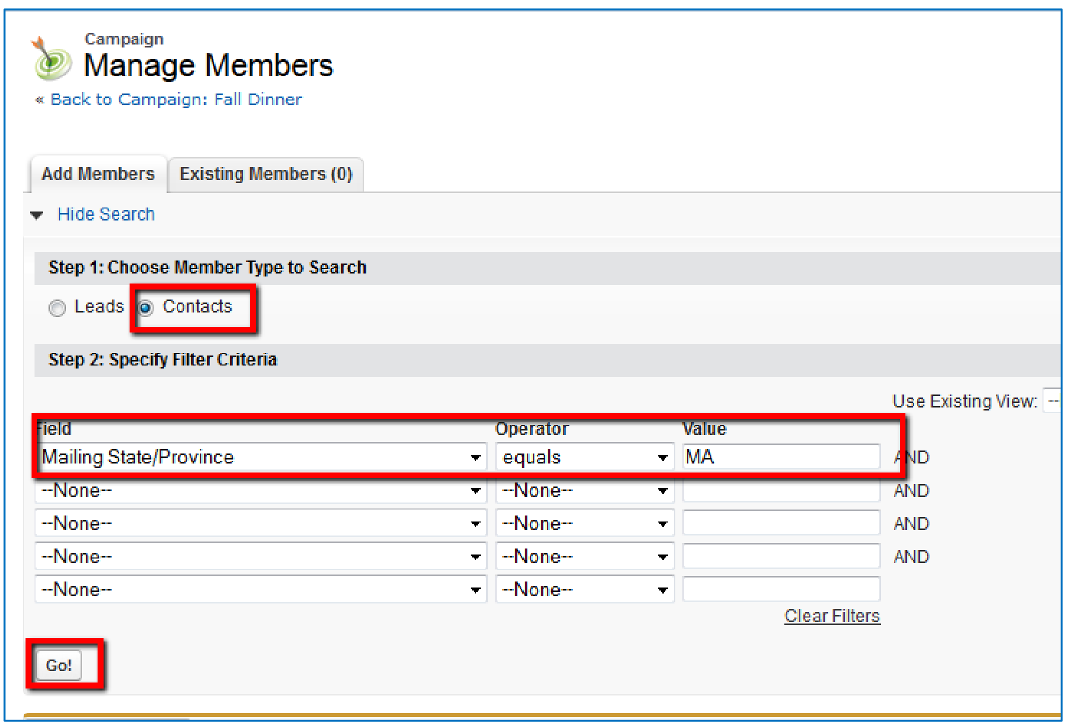
2. Under Campaign Name, enter "Fall Dinner"
3. Check "Active" (Note: This is important for it to show up in Active Campaigns)
4. Choose Status as "Planned"
5. Click "Save"



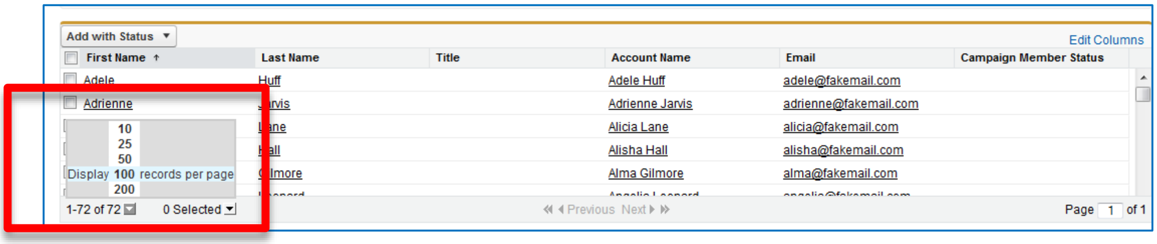
6. To add members, click on “Manage Members” and “Add Members-Search”



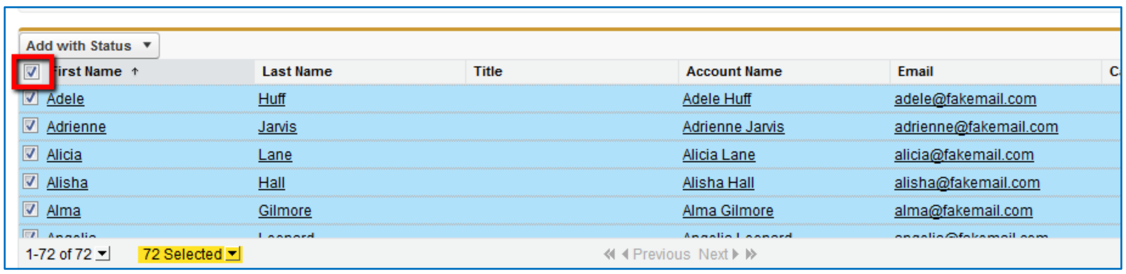
7. Choose Member Type to Search “Contacts”
8. Create Filter to specify contacts from Massachusetts
   a. Choose Filter Field “Mailing State/Province”
   b. Operator “Equals”
   c. For Value, type in “MA”
   d. Click “Go!”



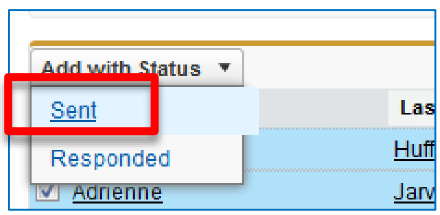
9. In the bottom left corner, select to display 100 records per page



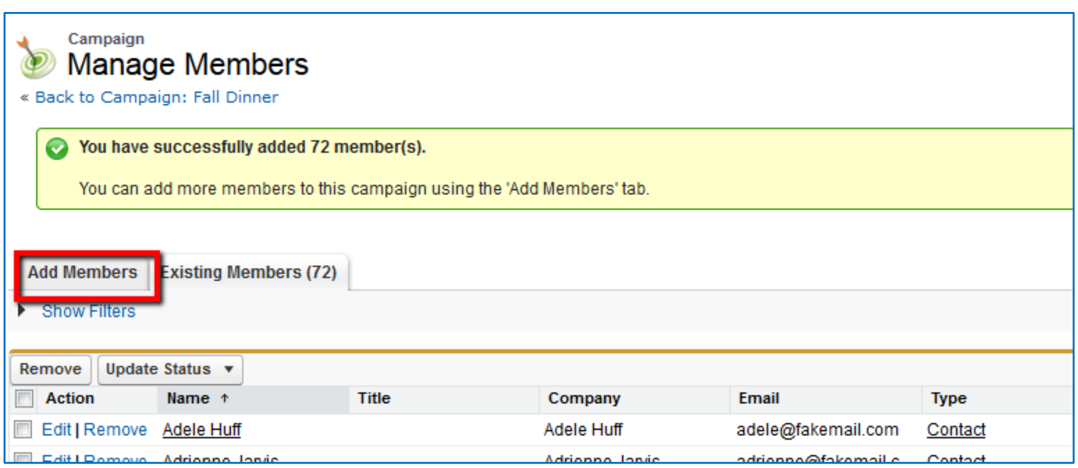
10. Check the top box next to First Name to select all records



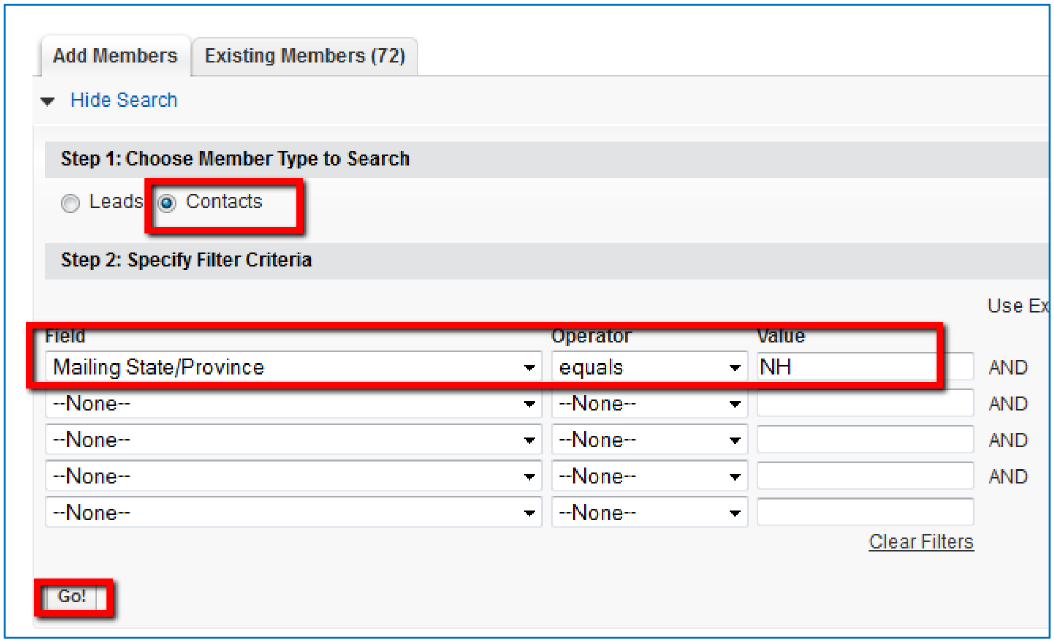
11. Under "Add with Status," select "Sent"



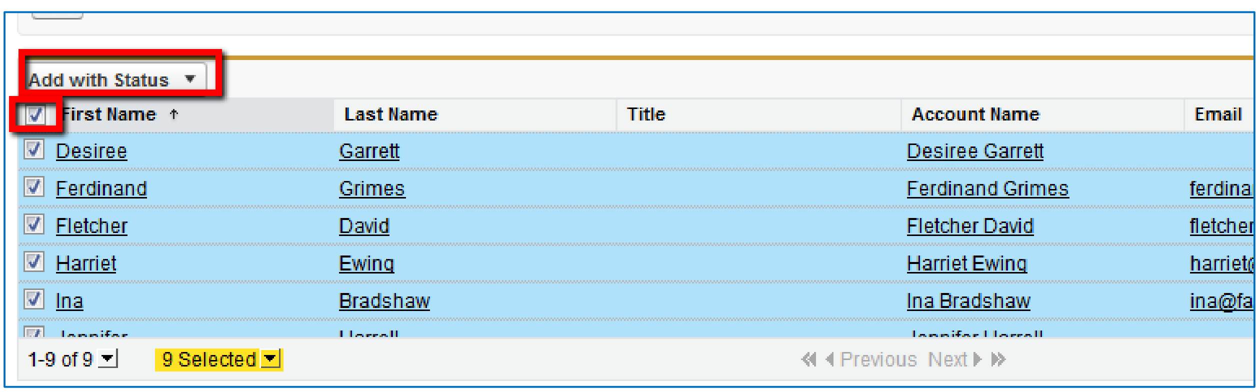
12. To Add more members- Contacts from NH
    a. Choose "Add Members"



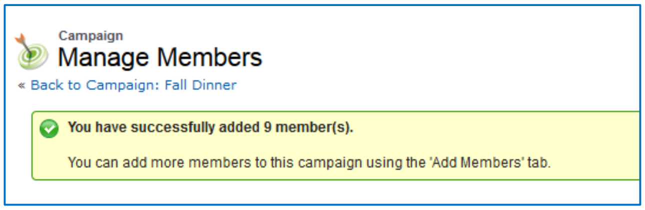
13. Choose Member Type “Contacts”
14. Choose “Mailing State/Province” “equals” “NH”
15. Click “Go”



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

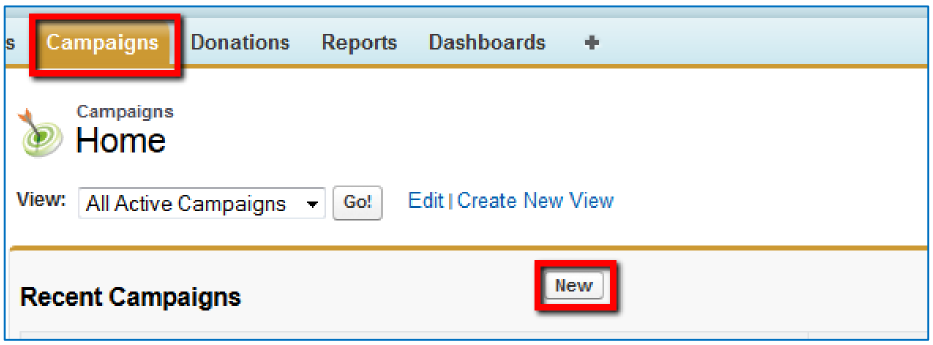


18. You will see the following message that your members have been added:

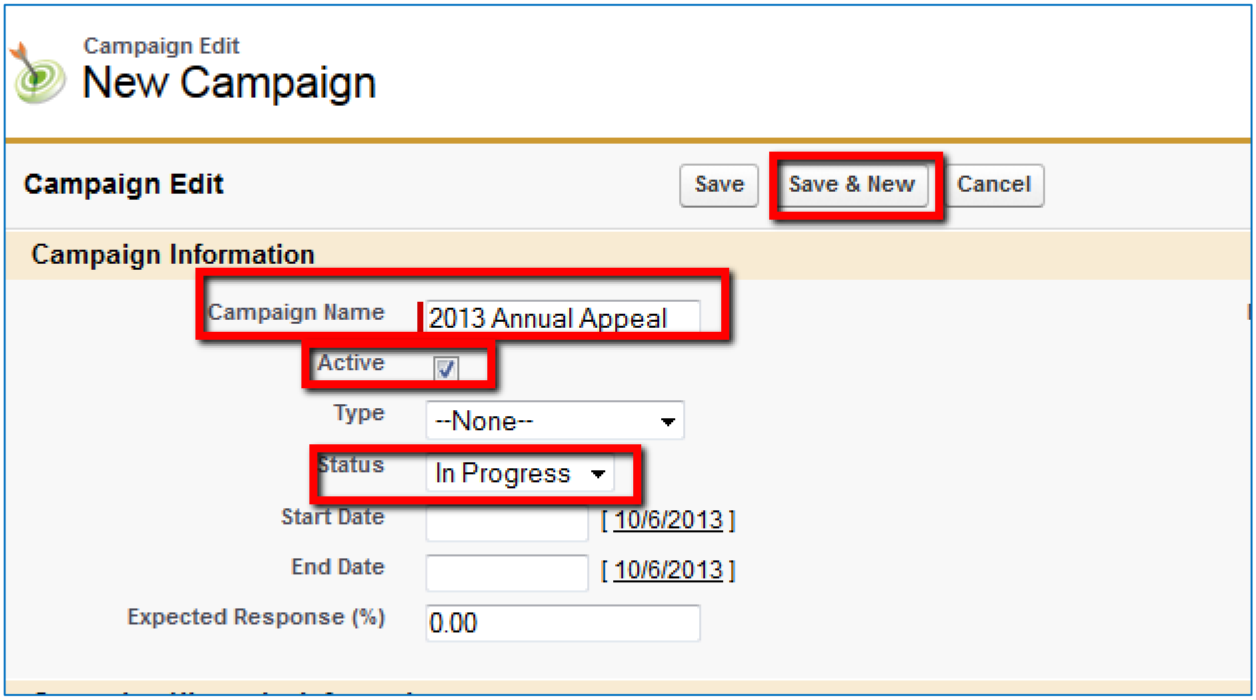


Set up a Parent Annual Campaign with Child Poster Campaign

1. Create a new campaign

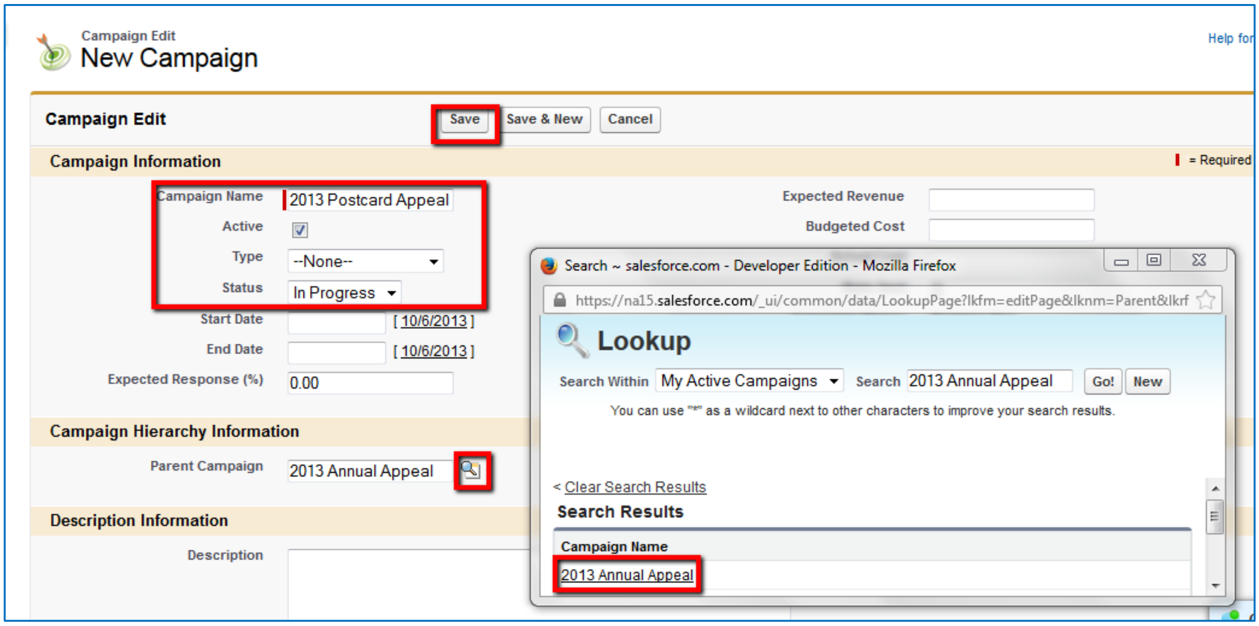


2. Write in Campaign Name "2013 Annual Appeal"
3. Check "Active"
4. Choose Status "In Progress"
5. Click "Save & New"

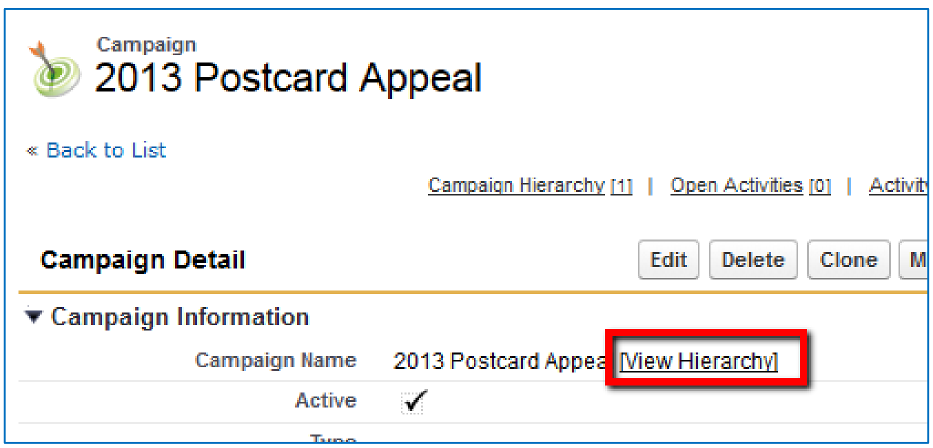


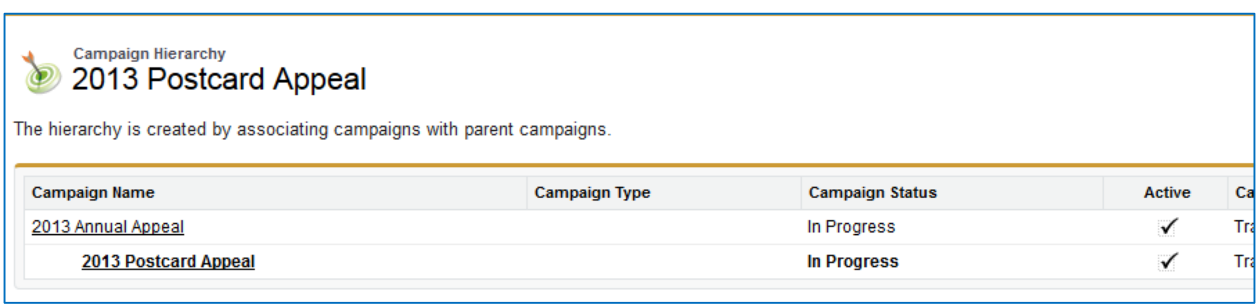
6. Write Campaign Name “2013 Postcard Appeal”
7. Check “Active”
8. Choose Status “In Progress” (By default “Type “shows up as “Conference”)

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



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



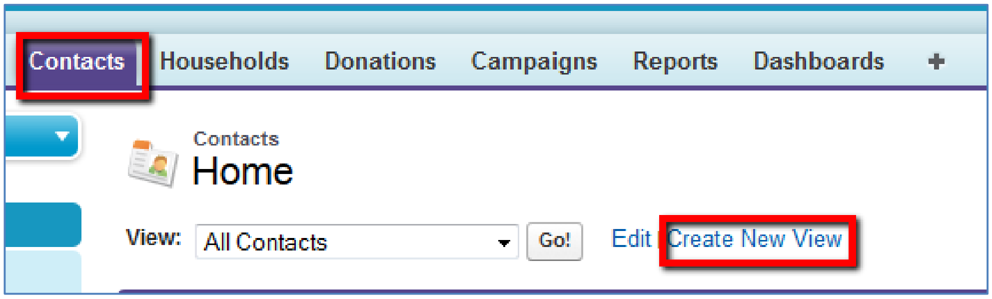


Revised February 2016

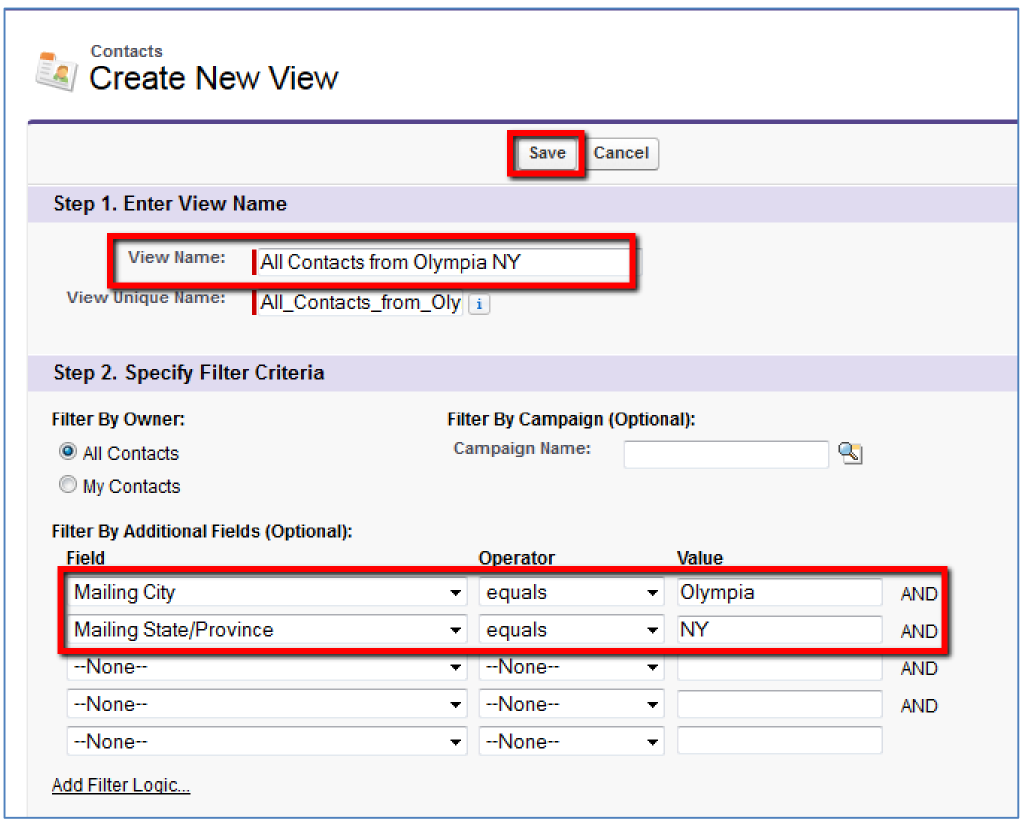
REPORTS

Exercise 1: Create a Custom View

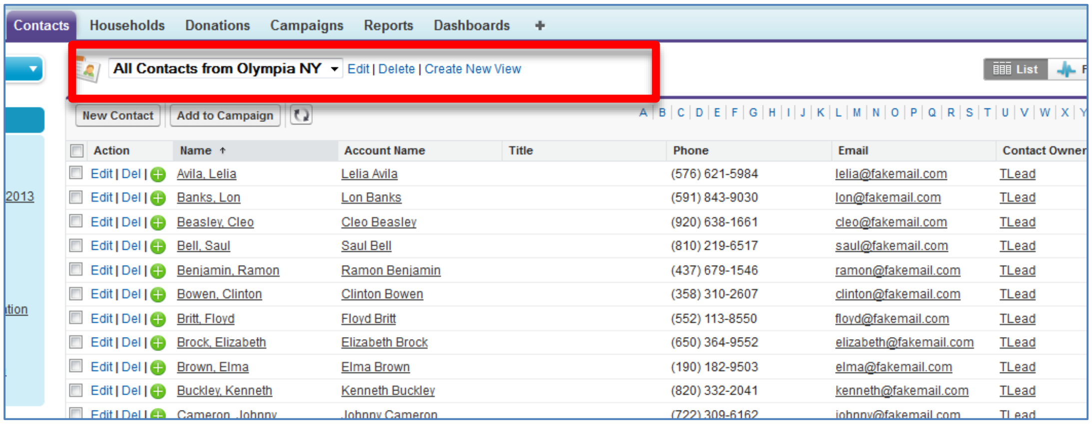
1) Go to the Contacts tab and click on link "Create New View"



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"

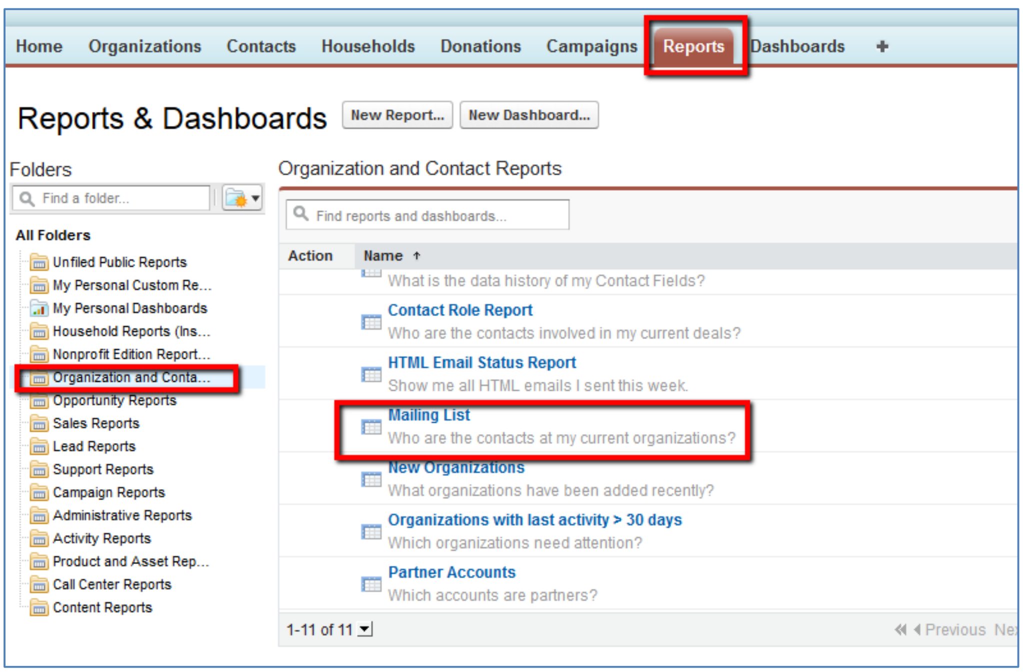


5) You will see the new view option Contacts View pull-down and all of the corresponding records

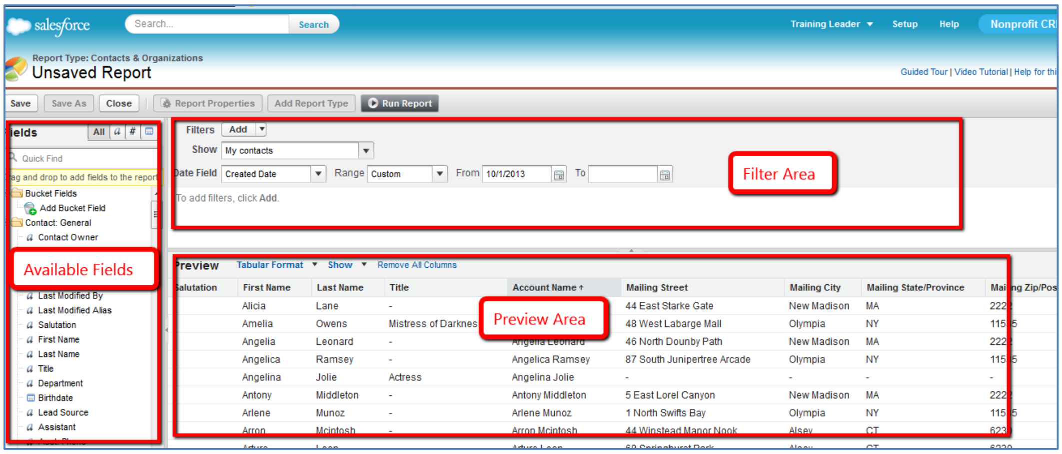


Exercise 2: Create a Summary Report for All Contacts by State

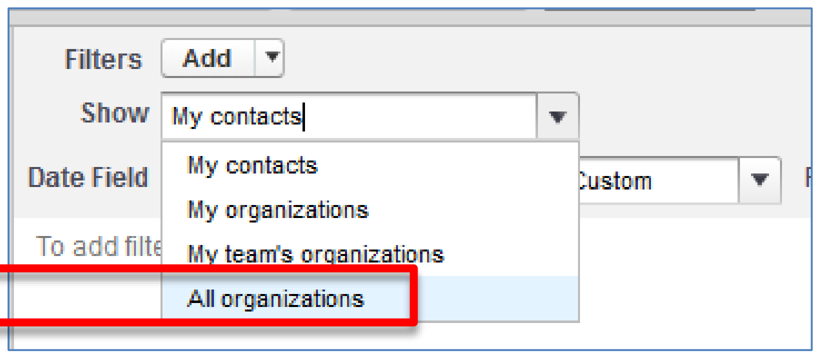
1) Click on the Reports Tab
2) Click on the Folder “Organization and Contacts”
3) Scroll down to the bottom and choose the “Mailing List” report



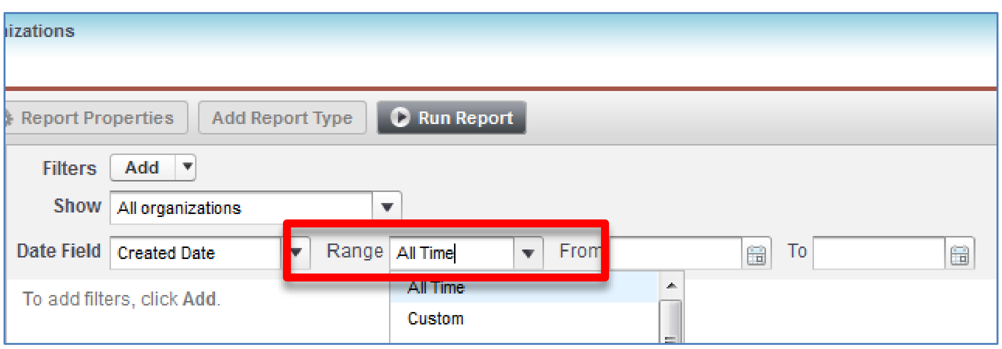
4) Your report will look like this:



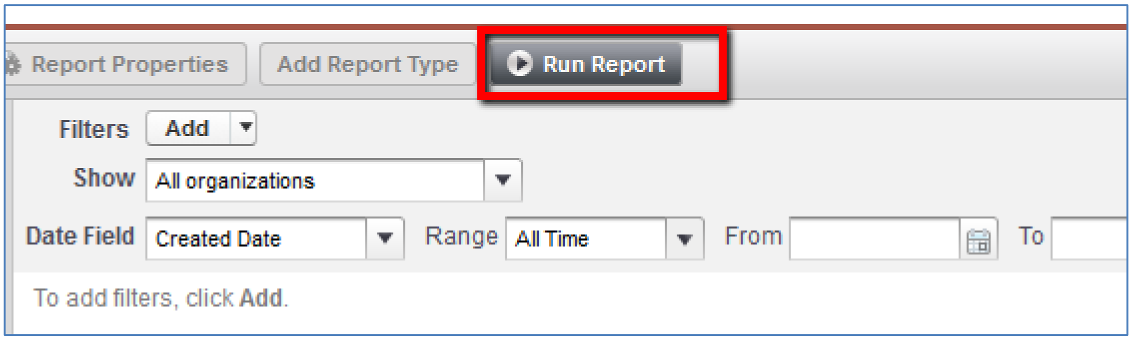
5) For Show, select “All Organizations” (this actually means “All Contacts”)



6) For Date Field, select “All Time”

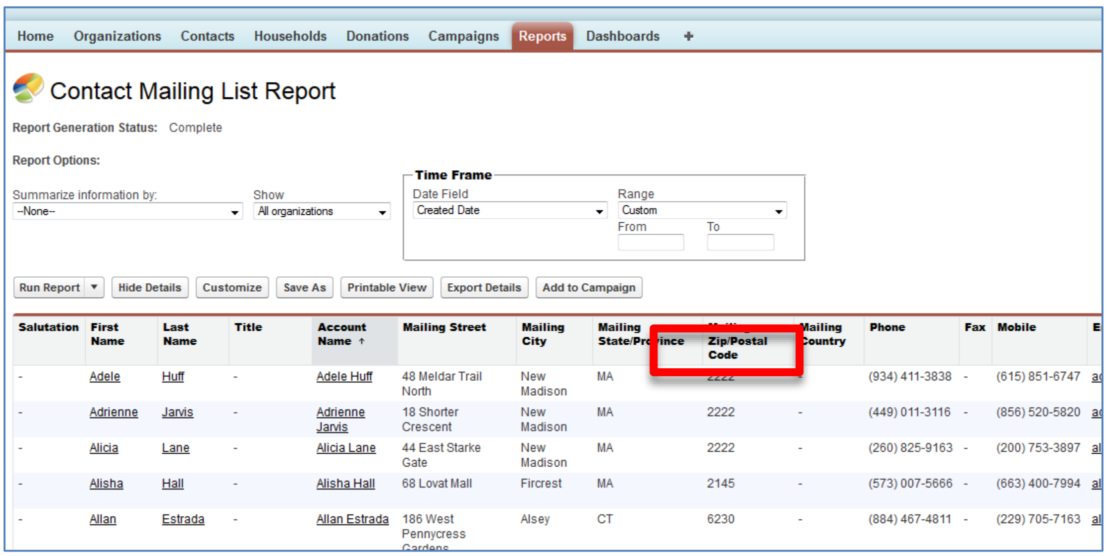


7) Click “Run Report”



Your report will look like this:

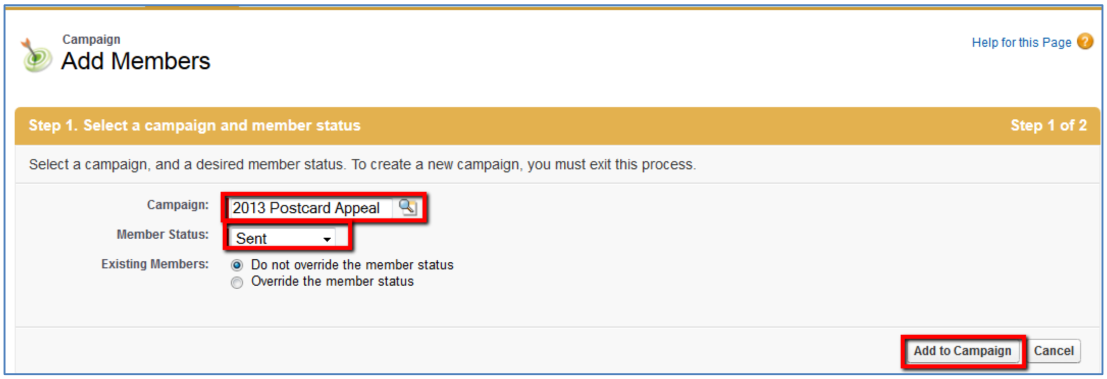
8) Click “Add to Campaign”



9) Lookup Campaign and choose “2013 Postcard Appeal”

10) Choose Member Status “Sent”

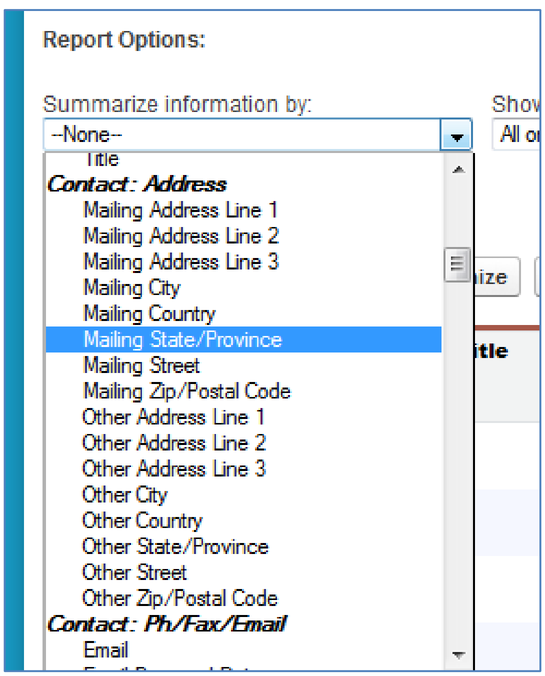
11) Click “Add to Campaign”



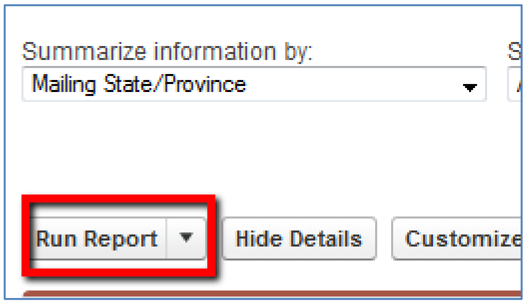
12) You will receive the following confirmation

13) Click “Done”

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

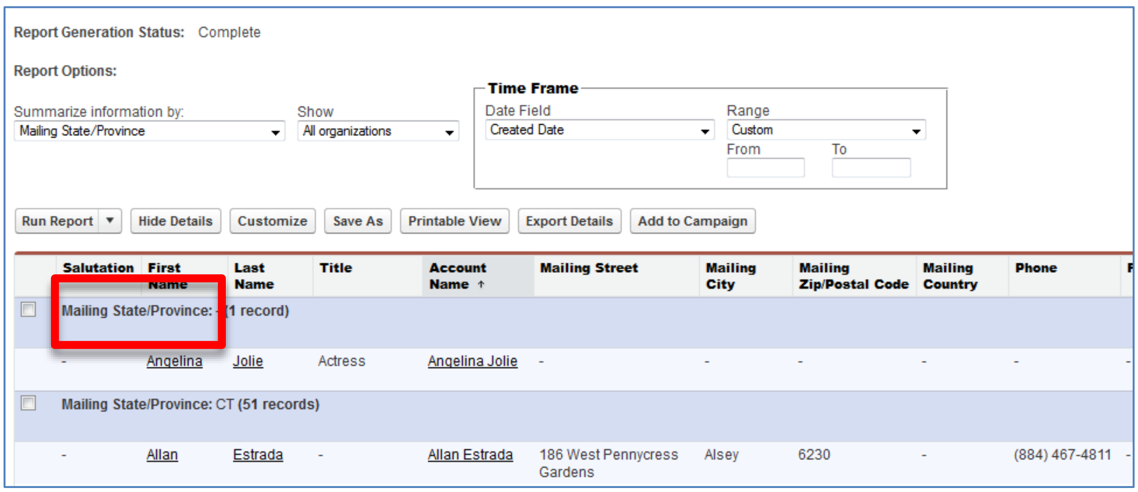


15) Click “Run Report”



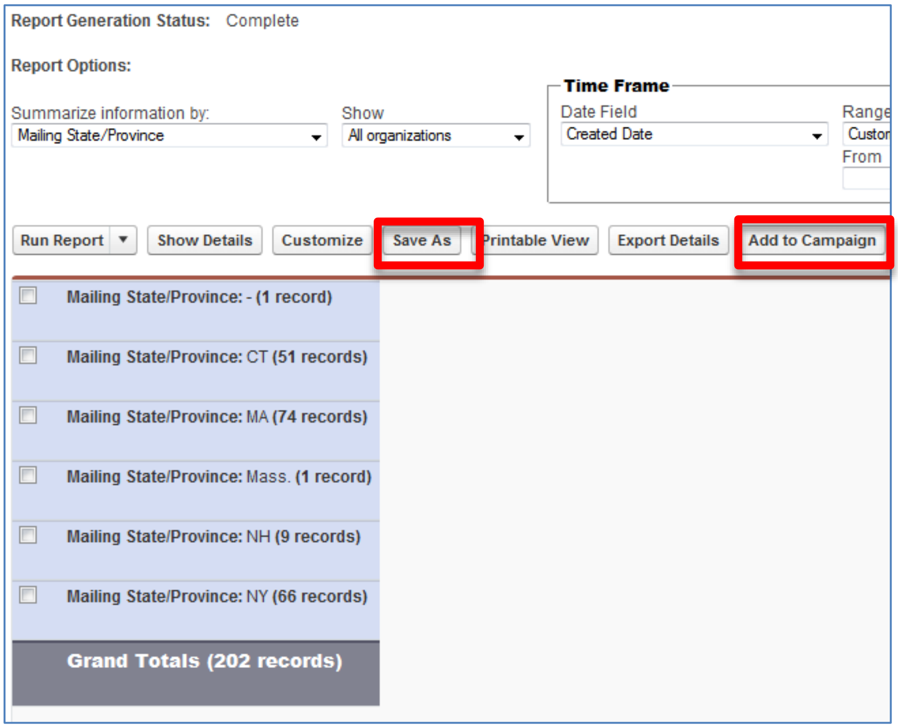
16) You will see that your contacts have been grouped by State in the report

17) Click “Hide Details”



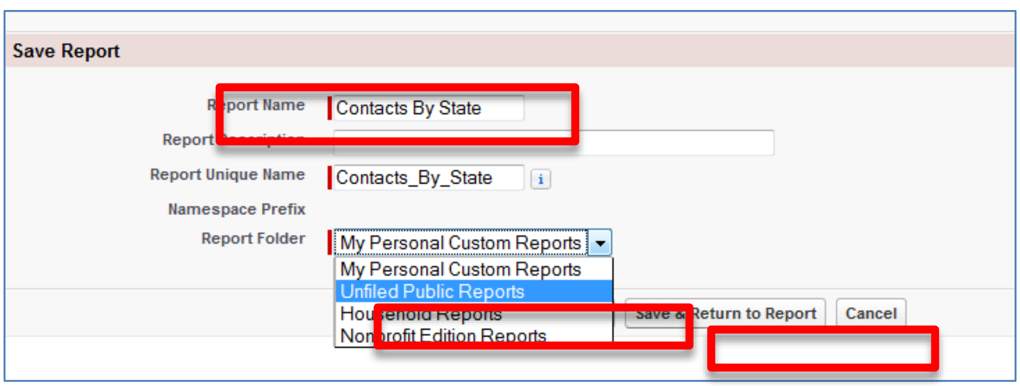
18) The report will provide a summary of records numbers for each State

19) Click on “Save As”



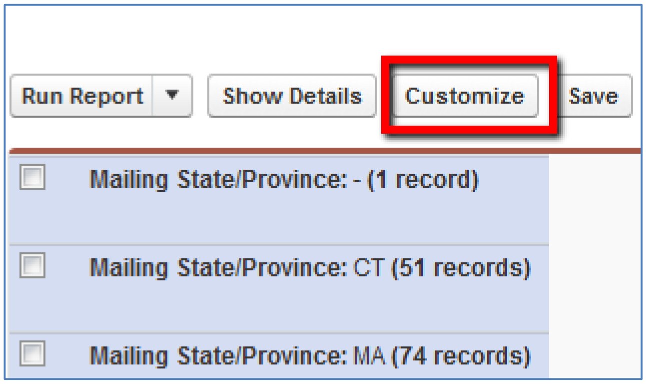
Name Report “Contacts By State”

20) Choose Report Folder “Unfiled Public Reports”
21) Click “Save & Return to Report”

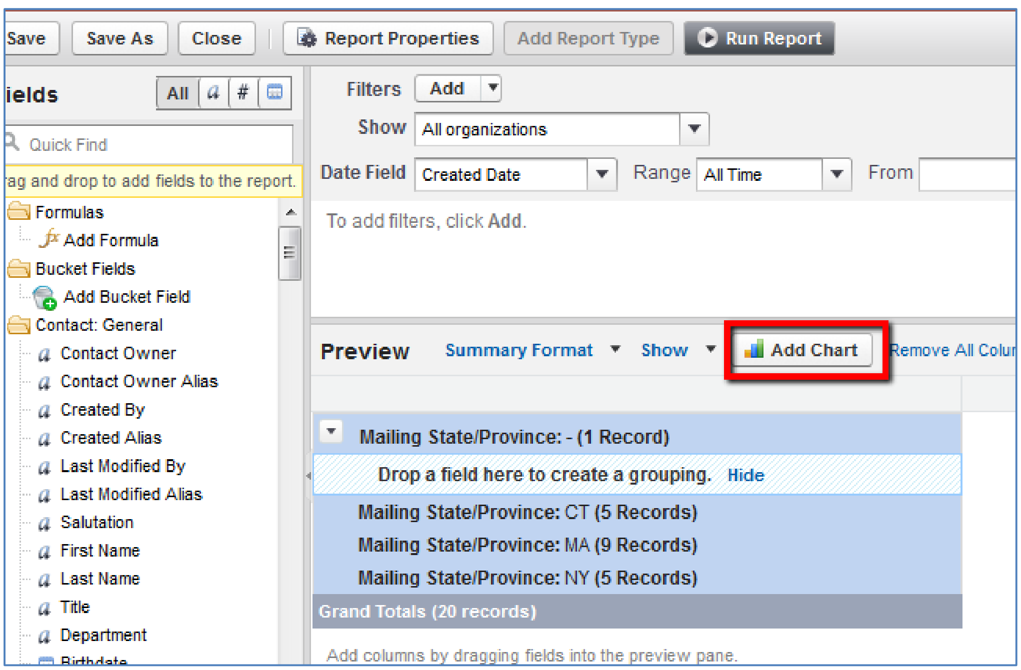


Create a Chart for Contacts by State

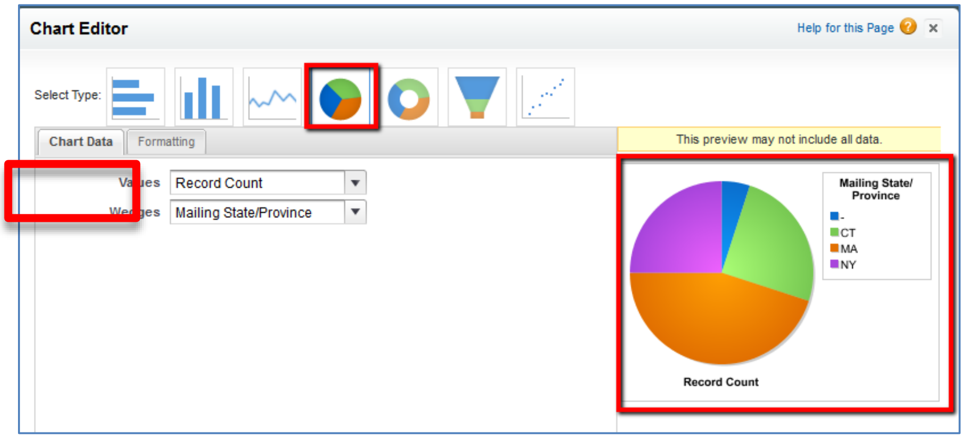
1) Go back to report and click “Customize”



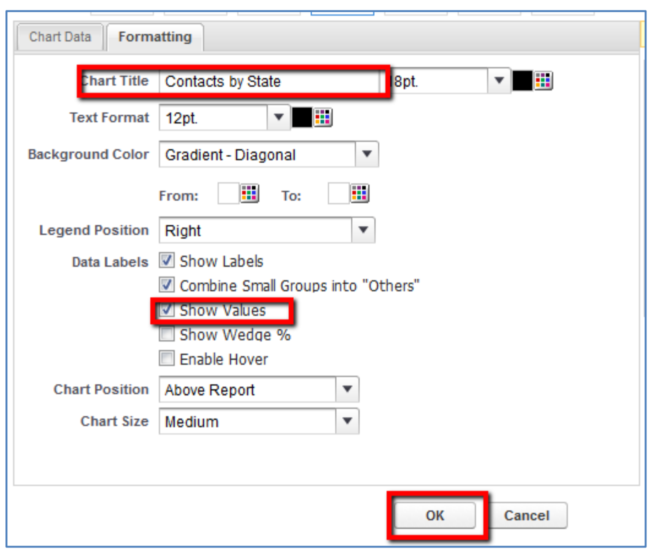
2) Click “Add Chart”



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

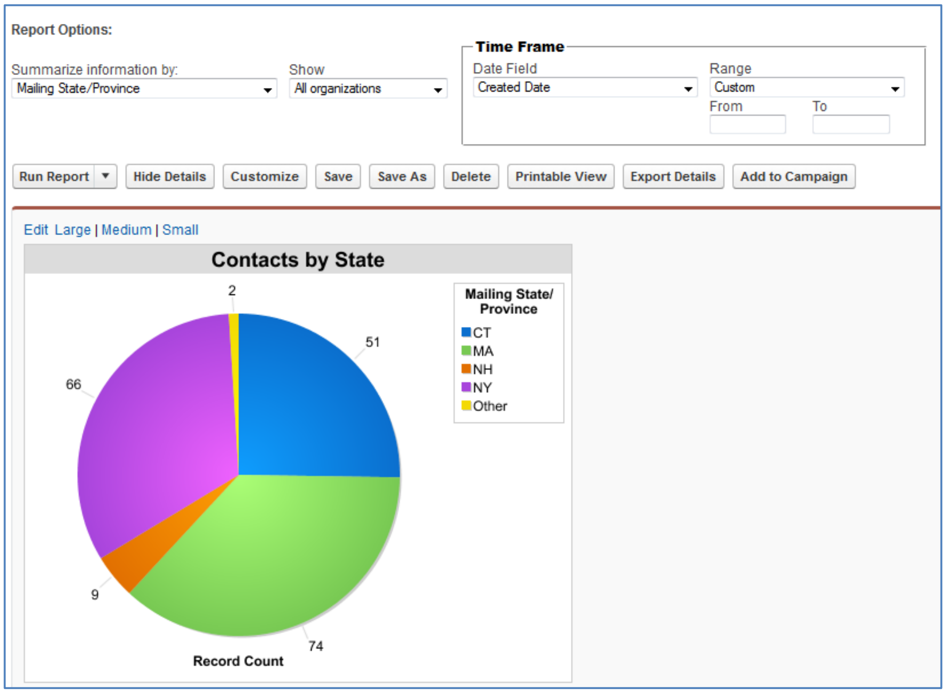


6) Name the Chart “Contacts by State”
7) Check the box for “Show Values”
8) Click “OK”

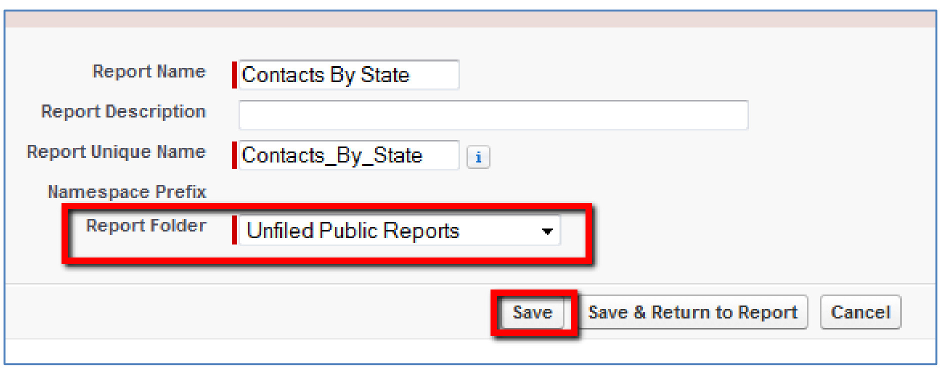


9) You will see a preview screen. Click “Run Report”

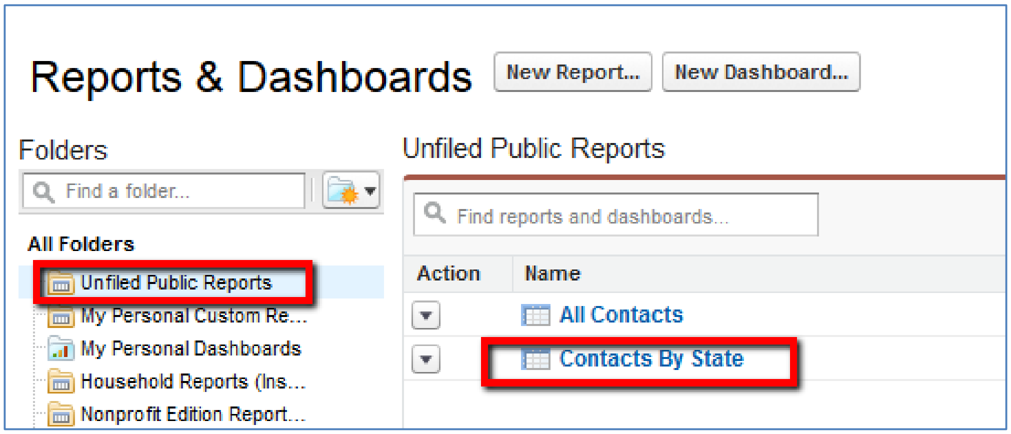
10) Your chart should look like this:



11) Save chart in "Unfiled Public Reports" and click "Save"

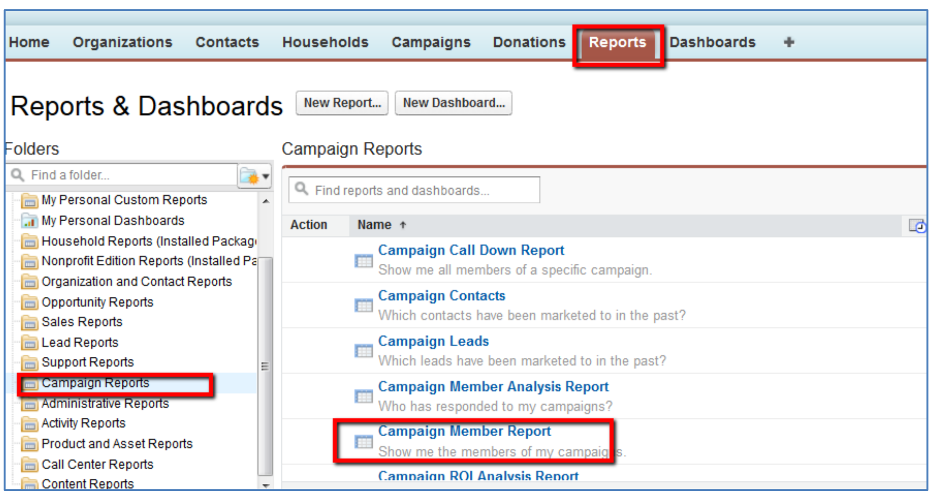


12) You can find your chart In the Reports tab under the “Unfiled Public Reports” folder



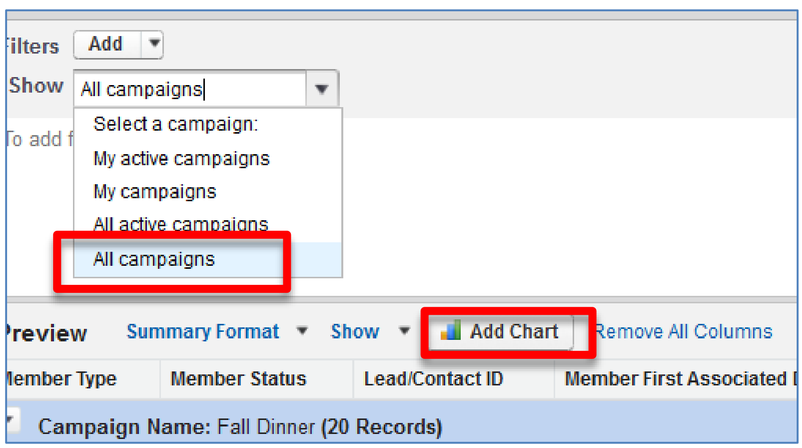
Create a Chart for Campaign Members

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

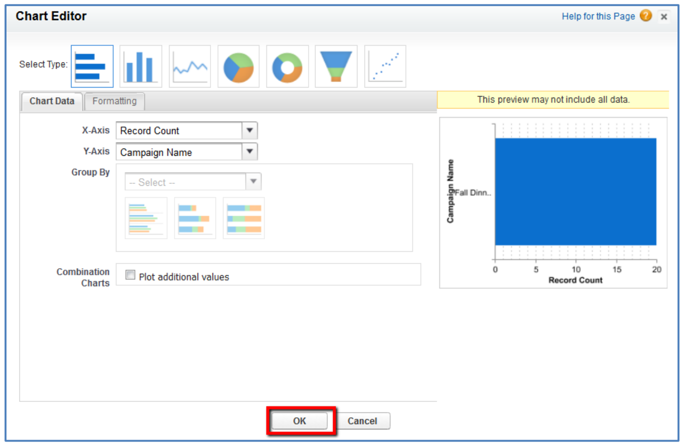


Select "Customize"

4) Show "All Campaigns"
5) Click "Add Chart"

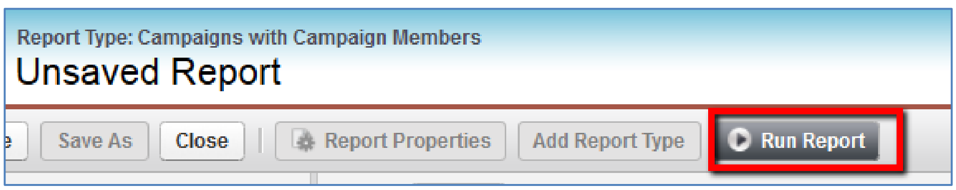


6) The Chart Editor will show a preview (Note: this does not show all data until you run the report)

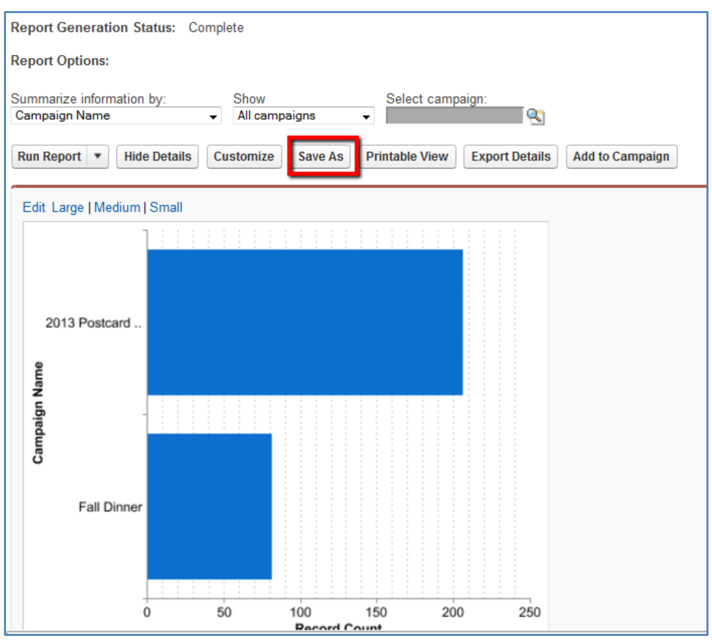


Click “OK”

Click “Run Report”

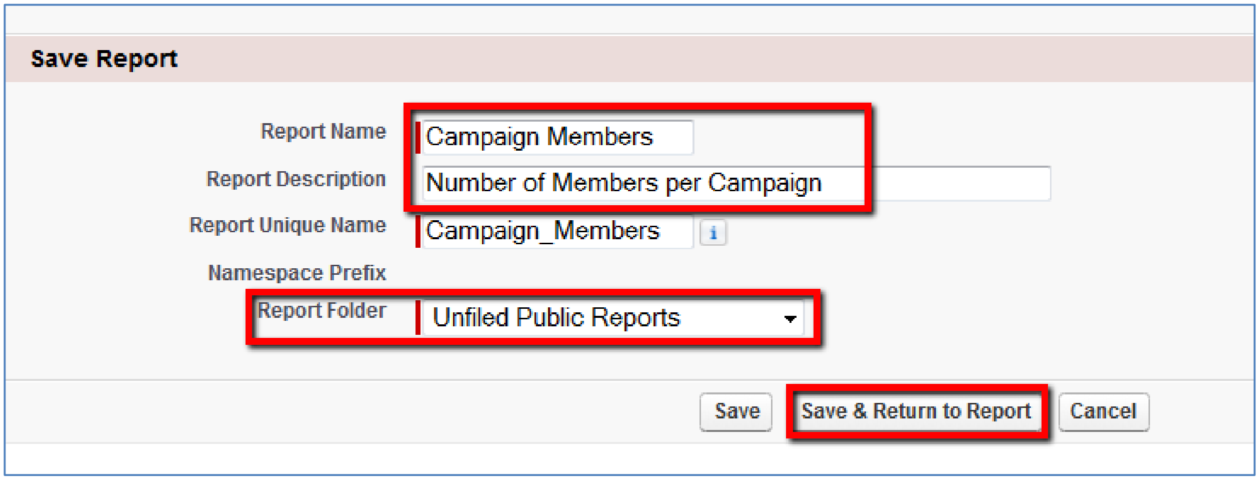


Your chart should look like this:



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

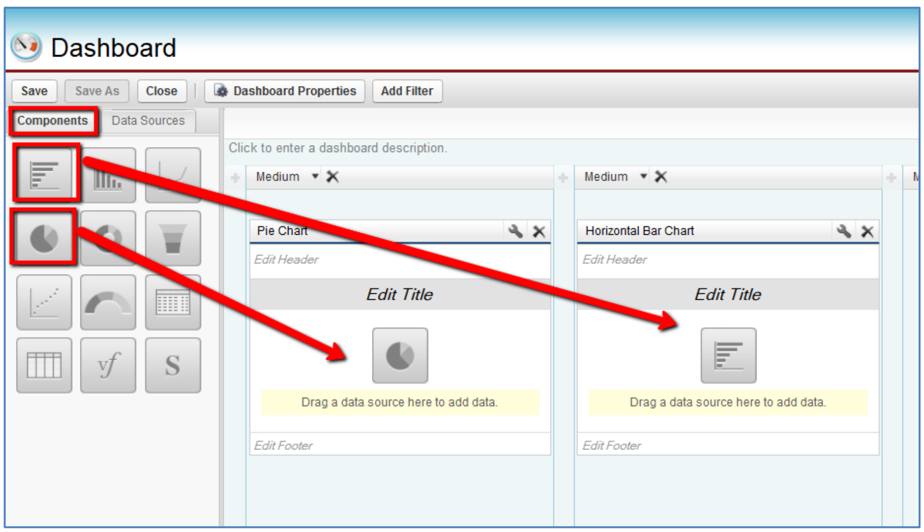
Click “Save & Return to Report”



DASHBOARDS

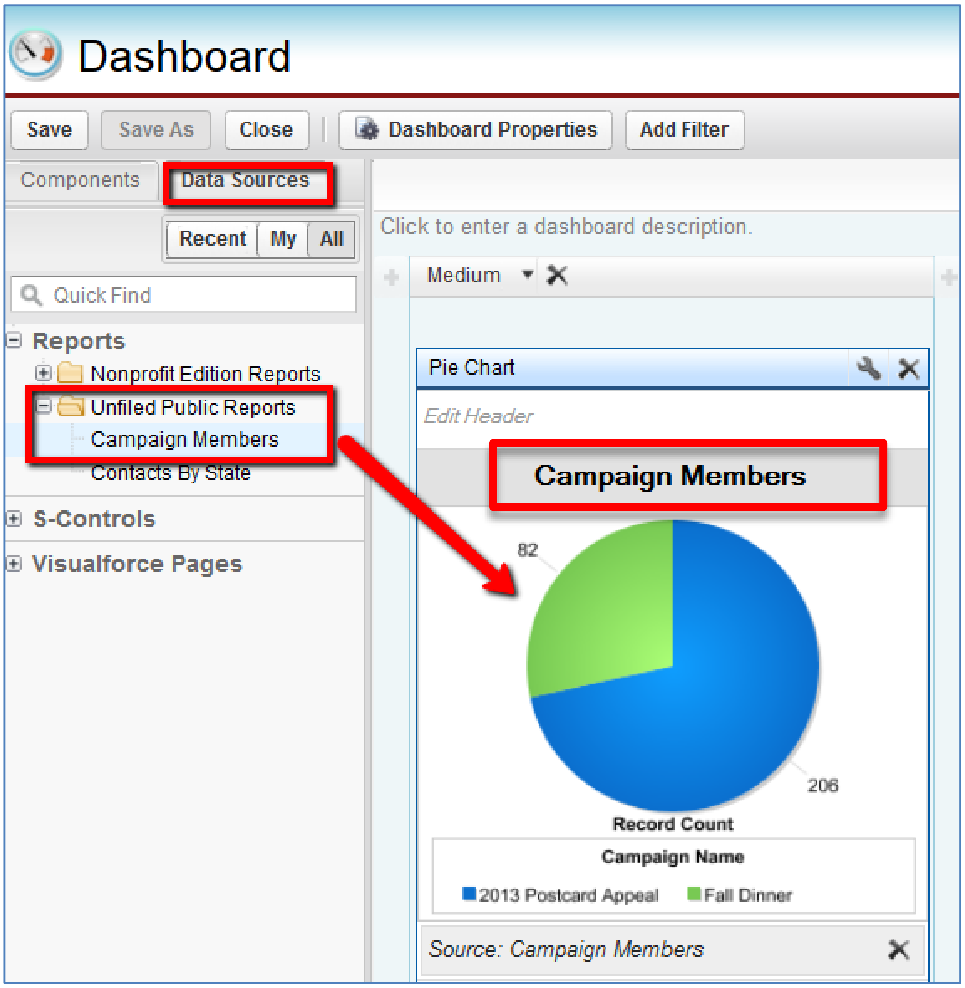
1) Select Reports Tab
2) Click “New Dashboard”

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)

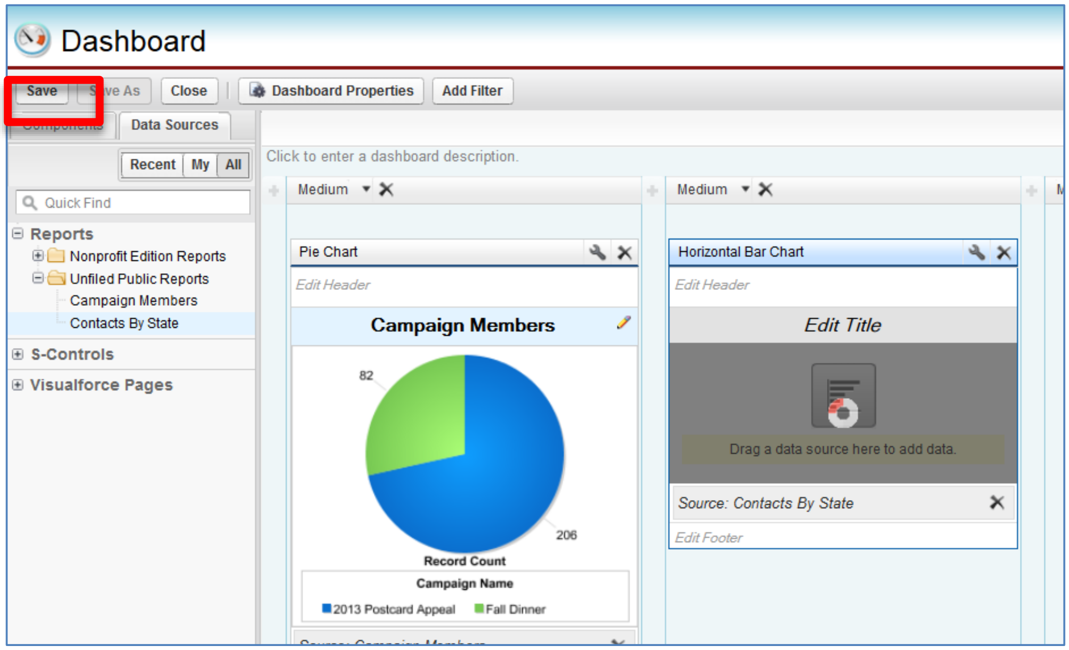
7) Name Chart "Campaign Members"



Select "Contacts by State" report and Drag to Horizontal Bar Chart

8) Name Title "Contacts By State"

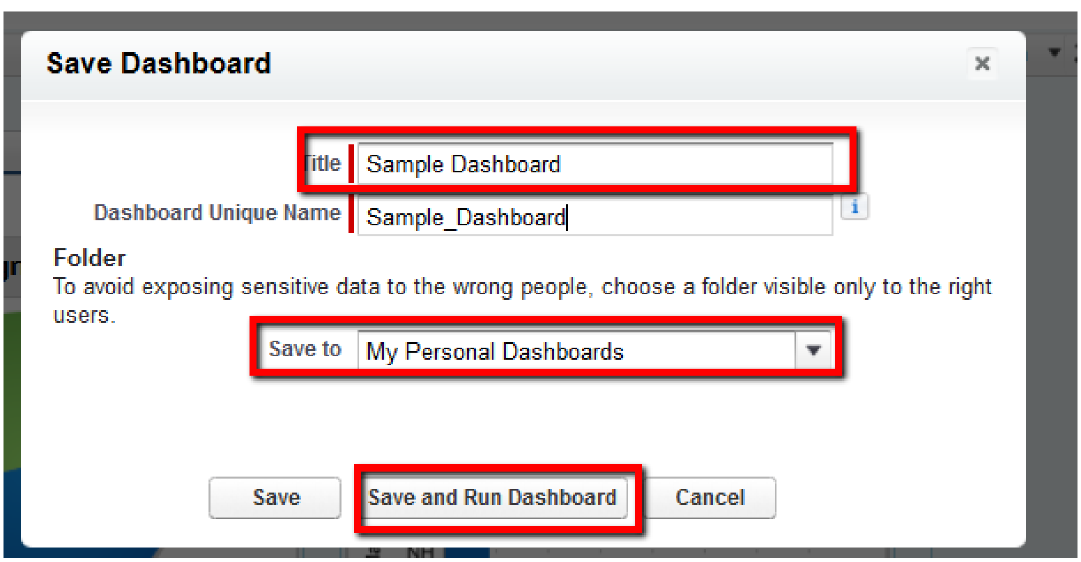
9) Save Dashboard



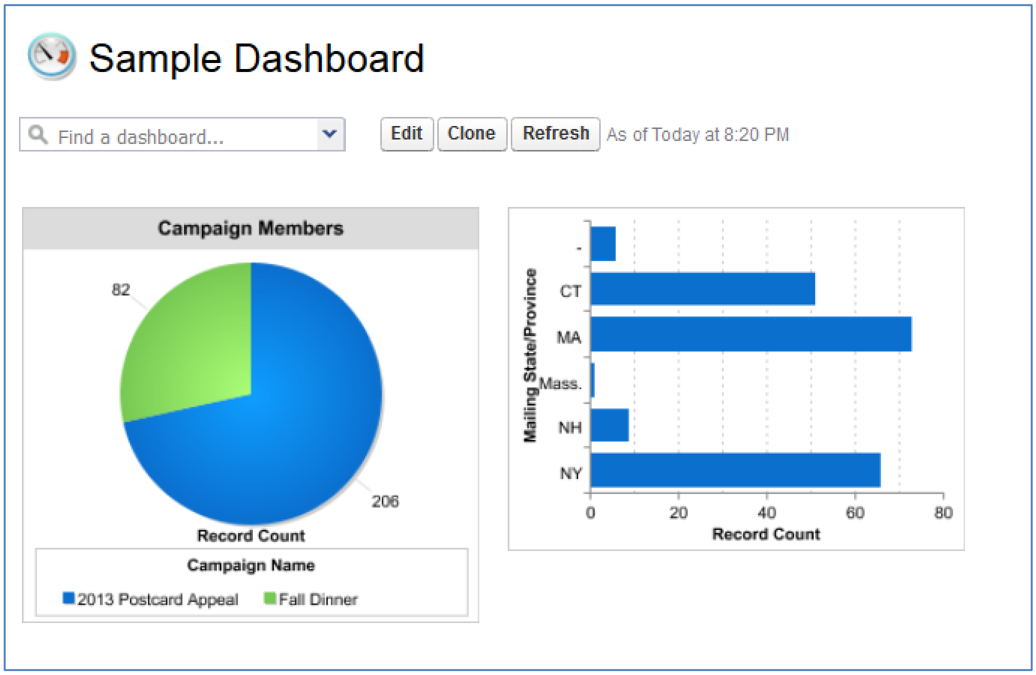
10) Name Dashboard "Sample Dashboard"

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.”

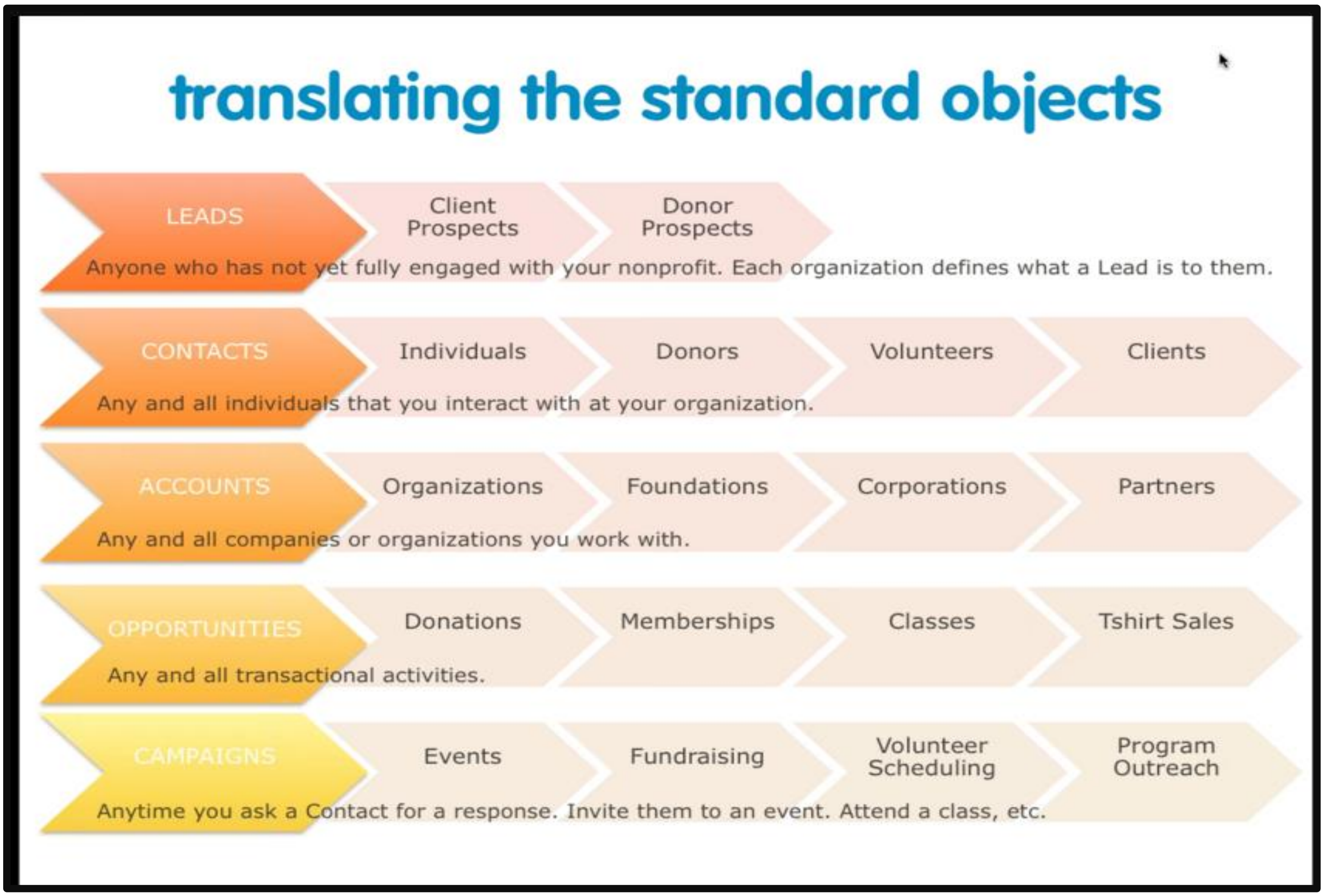
ORGANIZATION (or org): An organization is the virtual space provided to an individual customer of salesforce.com. Your organization includes all of your data and applications, and is separate from all other organizations.

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 importance 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. The 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 and 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.