



Salesforce “Lightning” Bootcamp 101 for Nonprofits Workbook



Contents

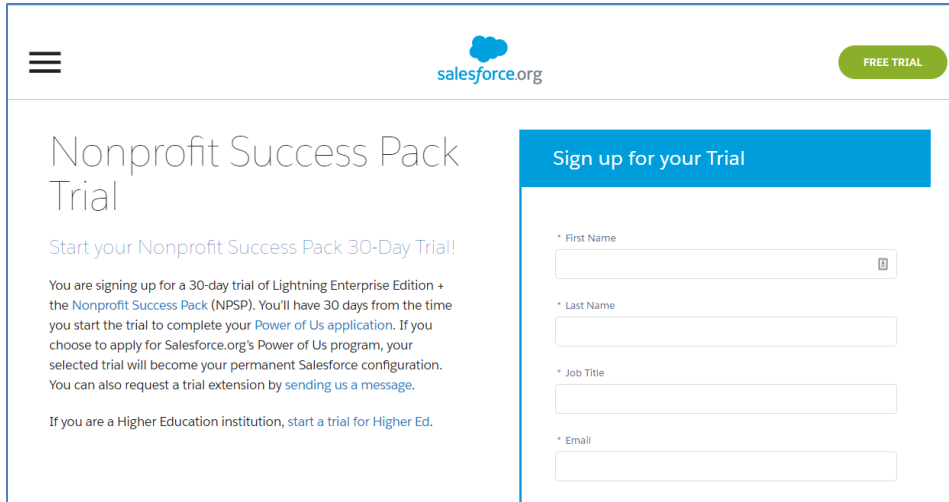
DOWNLOADING A TRIAL INSTANCE OF SALESFORCE	4
CREATING CONTACTS AND HOUSEHOLDS	7
Creating a Contact Record	7
Adding Another Person to a Household	8
Creating a Relationship Between Two Contacts.....	10
CREATING AN ORGANIZATION RECORD	13
Creating an Affiliation: Account to Contact	14
ENTERING DONATIONS AND GRANTS	16
Entering a Donation from the Contact Object.....	16
Where to Find Donation Information	17
Entering a Donation from the Opportunity Object.....	17
Entering a Donation from the Account Object	18
Entering a Grant.....	19
Contact Roles (“Soft Credit”)	20
ACTIVITIES: ACTION ITEMS FOR YOUR SALESFORCE DATA	22
The Activity Pane	22
Files	22
Attaching Emails to a Salesforce Record Automatically	23
UPLOADING CONTACT AND DONATION DATA	26
Download the Data Import Template.....	26
Add the NPSP Data Imports Custom Object to Your Tab Bar	27
Upload data into the NPSP Data Imports Custom Object.....	28
Transfer data in the Object to Standard Objects: Account, Contact, and Opportunity	31
Adding Data to Custom Fields.....	32
Updating Data with the NPSP Data Import Object	34
REPORTS.....	36
Creating a Report of Constituents	36
Sorting a Report	39

Filtering A Report	39
Sharing a Report.....	40
Create a Group Report.....	41
Creating a Chart	43
Pre-built Reports.....	43
Creating a Donor Mailing List.....	44
Dashboards	45
CAMPAIGNS.....	47
Attendance Campaigns	47
Adding Attendees (Campaign Members).....	47
Using a List View to Add Contacts to a Campaign	50
Parent and Child Campaigns	51
Campaign Hierarchy.....	52
Using Campaigns to Track Donations	53
CUSTOMIZING SALESFORCE (FOR SYSTEM ADMINISTRATORS)	55
Related List Quick Links.....	55
Creating Custom Fields	56
Edit Page Layouts	58
Rename “Account” and “Opportunity” Tabs	60
Adding or Removing Tabs From an App.....	61
Quick Way to Add/Remove Objects to Nav Bar:.....	63
USING THE “APPEXCHANGE”	65
APPENDIX.....	67
Introduction to “Salesforcese”	67

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:

- Go to www.salesforce.org/npsp-trial and complete the form.



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

Email
paul@501partners.com

Phone Number
5555552525

Organization
501Partners

Number of Employees
2-9 employees


Country
United States

State/Province
Massachusetts

Username
feb5@2016.com

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

 salesforce.org

[Salesforce for Nonprofits](#) [Salesforce for Higher Ed](#) [Grants](#) [Co](#)

Congratulations! Your Trial Awaits!

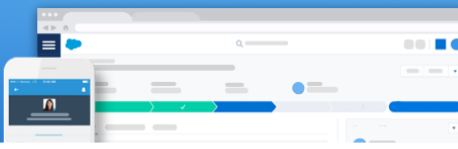
Check your email inbox for the first email that will guide you through your free trial (and include your initial login link).

If you don't see new emails from Salesforce in your inbox within the next few minutes, be sure to check your Spam folder (or Promotions category if you're using Gmail).

For documentation, training, and getting started tips, go to www.salesforce.org/help.

- 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

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?

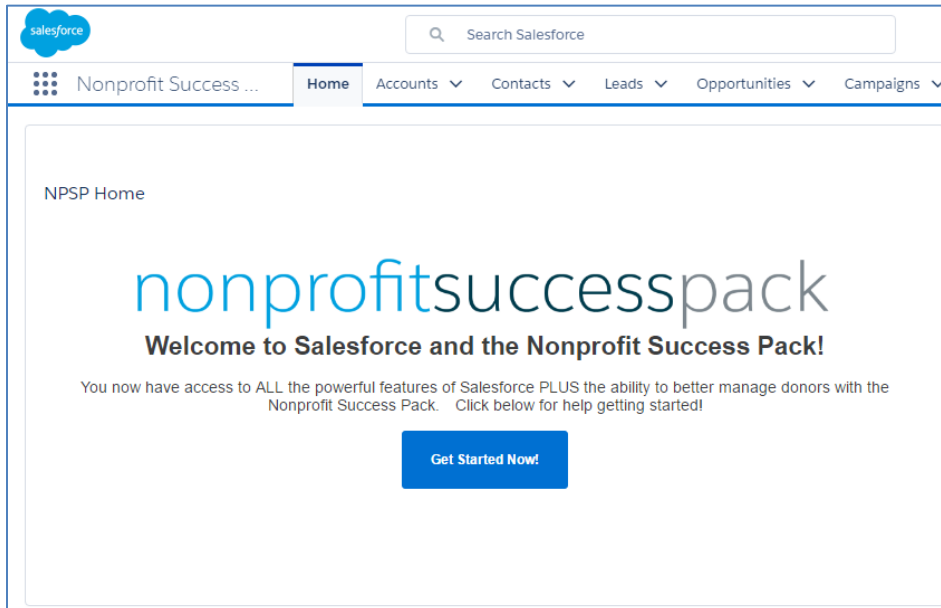
* Answer

Danvers

Change Password

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

- And you are ready to use Salesforce!

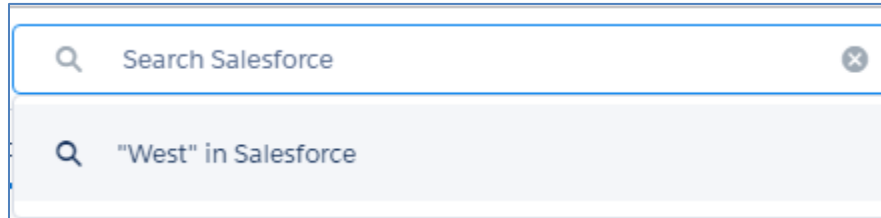


The image shows the Salesforce NPSP Home dashboard. At the top, there's a search bar and navigation tabs for Home, Accounts, Contacts, Leads, Opportunities, and Campaigns. The main content area features the 'nonprofitsuccesspack' logo and a welcome message: 'Welcome to Salesforce and the Nonprofit Success Pack!'. Below this, it states: 'You now have access to ALL the powerful features of Salesforce PLUS the ability to better manage donors with the Nonprofit Success Pack. Click below for help getting started!'. A blue button labeled 'Get Started Now!' is centered at the bottom of the main content area.

CREATING CONTACTS AND HOUSEHOLDS

Creating a Contact Record

- Create an individual record for Kanye West.
 - Search to see if “West” is in the system



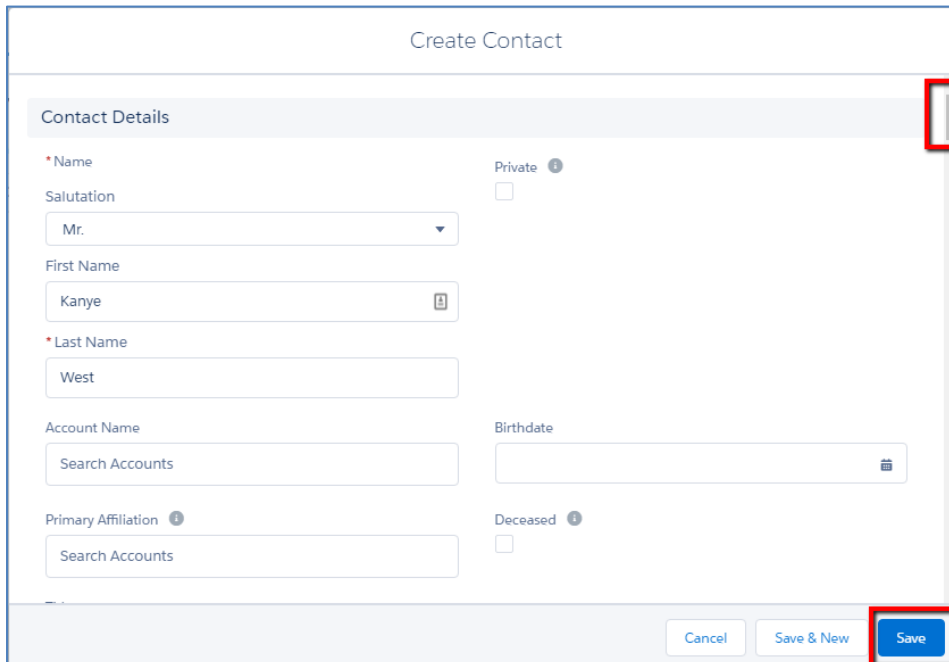
A screenshot of the Salesforce search bar. The search bar is labeled "Search Salesforce" and has a magnifying glass icon on the left and a close button on the right. Below the search bar, a dropdown menu shows the search results: "West" in Salesforce.

- Click the down arrow next to the Contacts tab and click “New Contact”



A screenshot of the Salesforce navigation bar. The navigation bar includes a logo on the left, followed by the text "Nonprofit Success ...". To the right of this text are several tabs: "Home", "Accounts", "Contacts", "Leads", "Opportunities", and "Campaigns". The "Contacts" tab is highlighted with a red box, and a dropdown arrow is visible next to it.

- Complete the Create Contact screen (scroll down to see more fields):
- Enter First Name “Kanye”, Last Name “West”
- Leave Account Name blank
- Enter Phone, Email, and Street Address
- Click Save



A screenshot of the Salesforce "Create Contact" screen. The screen is titled "Create Contact" and has a "Contact Details" section. The "Contact Details" section includes fields for "Name", "Salutation", "First Name", "Last Name", "Account Name", "Primary Affiliation", "Birthdate", and "Deceased". The "First Name" field is filled with "Kanye" and the "Last Name" field is filled with "West". The "Account Name" field is empty. The "Save" button is highlighted with a red box.

- Notice that the Account Name field was automatically filled in (“West Household”)

CONTACT

Mr. Kanye West

Account Name

West Household

Total Gifts

\$0.00

DETAILS

RELATED

▼ Contact Details

Name

Mr. Kanye West

Private

Birthdate

Primary Affiliation

Deceased

Account Name

West Household

Adding Another Person to a Household

Repeat the steps above:

- Search to see if “Kardashian” is in the system
- Create an individual record for Kim Kardashian
- Click the Contacts tab and click “New”
- Enter First Name “Kim”, Last Name “Kardashian”
- DO NOT click Save
- Under Account Name, type “West” and click on the West Household
- Now click Save

Create Contact

Contact Details

* Name

Private

Salutation

Ms.

First Name

Kim

* Last Name

Kardashian

Account Name

West

Birthdate

Deceased

▼ "West" in Accounts

West Household

Household Account

Cancel

Save & New

Save



- Kim Kardashian and Kanye West are in the West and Kardashian Household

Note that Kim Kardashian is automatically listed at Kanye West's Mailing Address

▼

Contact Details

Name

Ms. Kim Kardashian

Account Name

West and Kardashian Household

Primary Affiliation

- Click on the link for the West and Kardashian Household or click on Accounts to see the Household record:

Nonprofit Success ...

Home

Accounts ▾

Contacts ▾

Leads ▾

Opportunities ▾

ACCOUNT

West and Kardashian Household

Primary Contact

Total Gifts

Total Number of Gifts

Household Phone

Kanye West

\$0.00

0

DETAILS

RELATED

Account Name

Household Phone

West and Kardashian Household

Primary Contact

Number of Household Members ¹

Kanye West

2

Formal Greeting ¹

Mr. Kanye West and Ms. Kim Kardashian

Informal Greeting ¹

Kanye and Kim

▼ Address

Billing Address

Shipping Address

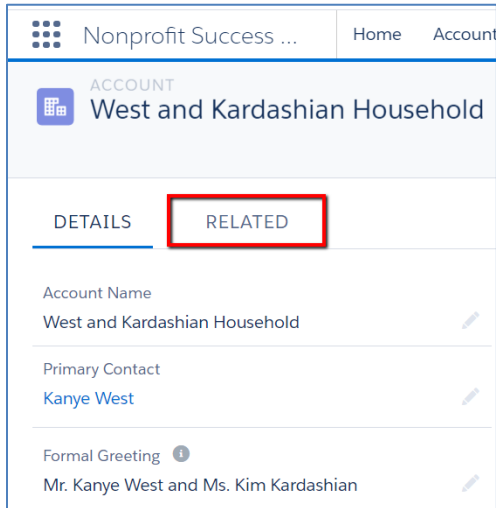
123 Main Street,

Malden, MA 02148 United States

To add additional Contacts to the Household

- Click Related to move to the Related Lists page





Nonprofit Success ... Home Account

ACCOUNT
West and Kardashian Household

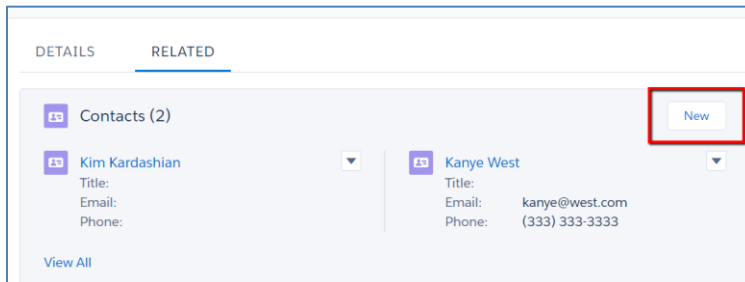
DETAILS RELATED

Account Name
West and Kardashian Household

Primary Contact
Kanye West

Formal Greeting ⓘ
Mr. Kanye West and Ms. Kim Kardashian

- Click New next to Contacts



DETAILS RELATED

Contacts (2) New

Kim Kardashian
Title:
Email:
Phone:

Kanye West
Title:
Email: kanye@west.com
Phone: (333) 333-3333

View All

- Complete the Contact record for Ms. North West and Mr. Saint West. Each will automatically be added to the West and Kardashian Household

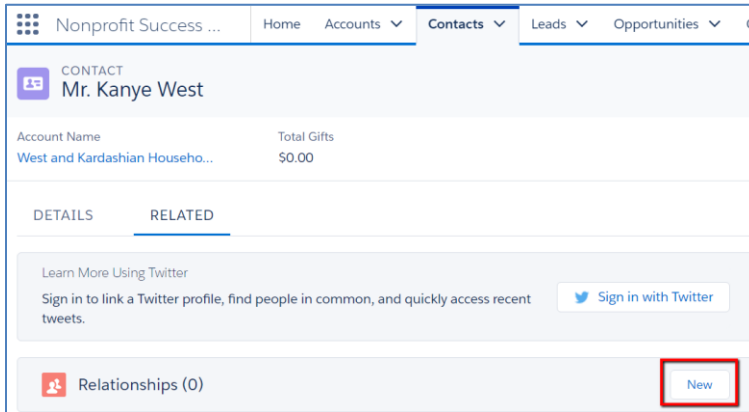
Creating a Relationship Between Two Contacts

A Household indicates that two Contacts are connected by virtue of living at the same street address. If you want indicate another type of connection between Contacts, you can use the Relationship function

Note: In Lightning you can create a relationship between two existing Contacts or create the second Contact on the fly in the course of creating the relationship

To create a relationship between Kanye West and Paul McCartney:

- Search and pull up Kanye West's record
- Click on Related
- Click New next to Relationship



Nonprofit Success ... Home Accounts ▾ **Contacts ▾** Leads ▾ Opportunities ▾ C

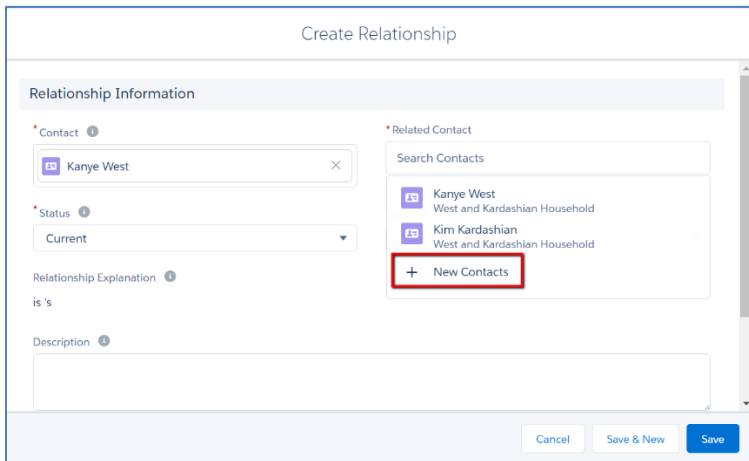
CONTACT
Mr. Kanye West

Account Name: West and Kardashian Househo... Total Gifts: \$0.00

DETAILS **RELATED**

Learn More Using Twitter
Sign in to link a Twitter profile, find people in common, and quickly access recent tweets. [Sign in with Twitter](#)

Relationships (0) New



Create Relationship

Relationship Information

* Contact ⓘ
Kanye West

* Status ⓘ
Current

Relationship Explanation ⓘ
is 's

Description ⓘ

* Related Contact
Search Contacts

Kanye West
West and Kardashian Household

Kim Kardashian
West and Kardashian Household

+ New Contacts

Cancel Save & New Save

- Click Search Contacts
- If the Contact is already in Salesforce, enter the name in the Search field. If not, click New Contacts
- Create Paul McCartney as a Contact
- Save the Contact record.
- It will return you to the Relationship record
- Indicate Status and Type of the Relationship, using picklists
- Save the Relationship record

Create Relationship

Relationship Information

* Contact ⓘ

Kanye West

* Related Contact ⓘ

Paul McCartney

* Status ⓘ

Current

Type ⓘ

Friend

Relationship Explanation ⓘ

is 's

Description ⓘ

Cancel Save & New Save

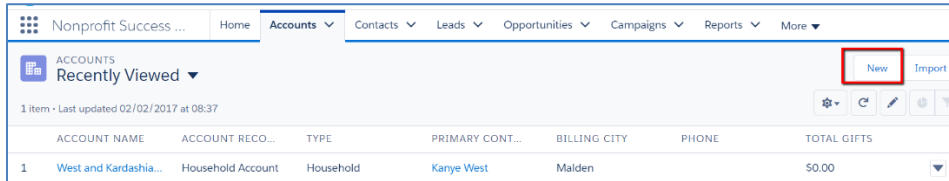
- The Relationship record now says, “Mr. Paul McCartney is Mr. Kanye West's Friend”

CREATING AN ORGANIZATION RECORD

Create Organization “Gates Foundation”

Note: Always Search first to make sure the record doesn’t already exist

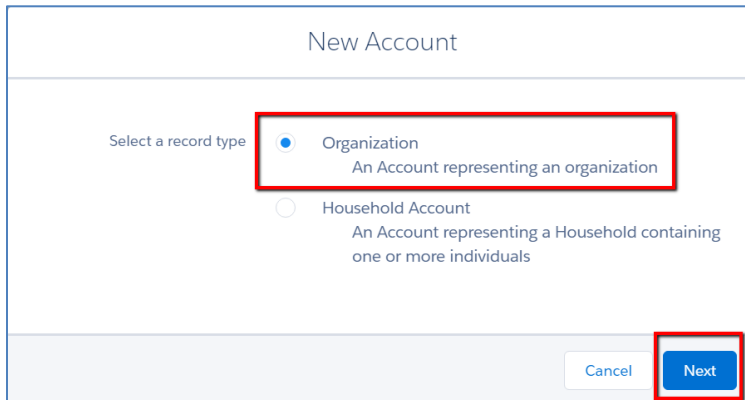
- Type “Gates” into the Search Bar and click “Search”
- Click on “Accounts” Tab
- Click “New” Button
- (Or click the down arrow and select New Account)



ACCOUNT NAME	ACCOUNT RECO...	TYPE	PRIMARY CONT...	BILLING CITY	PHONE	TOTAL GIFTS
1 West and Kardashia...	Household Account	Household	Kanye West	Malden		50.00

Note: the West and Kardashian Household already exists as an Account. Accounts can be either Households or Organizations

- Make sure that Organization is selected and click Next



New Account

Select a record type

☒ Organization
An Account representing an organization

☐ Household Account
An Account representing a Household containing one or more individuals

Cancel Next

- Enter data for the Gates Foundation and click Save

Create Account: Organization

* Account Name
Gates Foundation

Phone

Account Record Type
Organization

Fax

Type
Foundation

Website
www.gatesfoundation.org

Primary Contact
Search Contacts

Address

Billing Address

Shipping Address

Cancel Save & New Save

Creating an Affiliation: Account to Contact

Starting from the Gates Foundation record go to the Related List page (Related)

Nonprofit Success ... Home Accounts Contacts Leads Opportunities

ACCOUNT
Gates Foundation

Primary Contact Total Number of Gifts Total Gifts Website
0 \$0.00 www.gatesfoundation.org

DETAILS RELATED

Affiliated Contacts (0) New

Click Search Contacts

- Click New Contact
- Create a Contact record for Bill Gates (or search for an existing Contact)
- Save the Contact record
- Return to the Affiliation Record
- Add the Status and Role

Create Affiliation

Affiliation Information

* Organization
Gates Foundation

* Contact
Bill Gates

Role
CEO

Status
Current

Start Date
2/1/2000

End Date

Primary ☐

Description

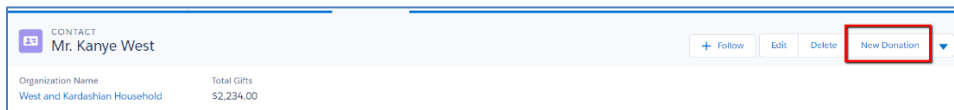
Cancel Save & New Save

ENTERING DONATIONS AND GRANTS

The NPSP offers several different ways to record a Donation. Typically, we recommend entering a donation that comes from an individual from the Contact object. However if you want to indicate that it comes from a couple, you may use the Opportunity or Account objects. Finally, you should typically enter Corporate or Foundation donations or grants from the Account object.

Entering a Donation from the Contact Object

- Open the record for the Contact/Donor
- On the Details page, click the button on the right marked New Donation



CONTACT
Mr. Kanye West

Organization Name: West and Kardashian Household
Total Gifts: \$2,234.00

+ Follow Edit Delete **New Donation**

- A window appears. Complete the following fields:
- Donation Name (Auto-fills)
- Close Date (Auto-fills today's date; can be edited)
- Stage (Posted = money in hand)
- Amount
- Primary Campaign Source (Optional – see chapter on Campaigns below)



New Donation

* Donation Name
Kanye West Donation 2/27/2017

* Close Date
2/27/2017

* Stage
Posted

Amount
1,000.00

Primary Campaign Source
Search Campaigns

Cancel Save

- Click Save

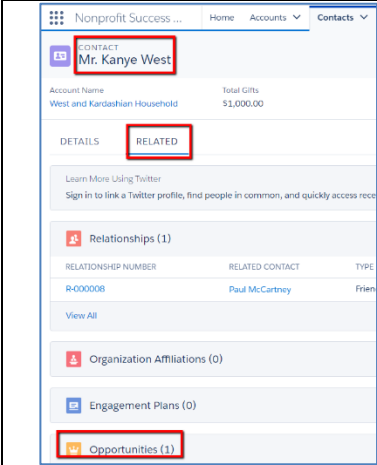
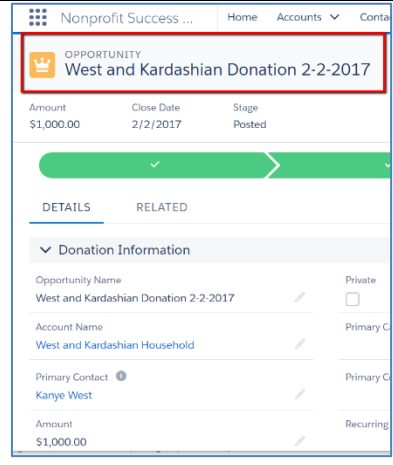
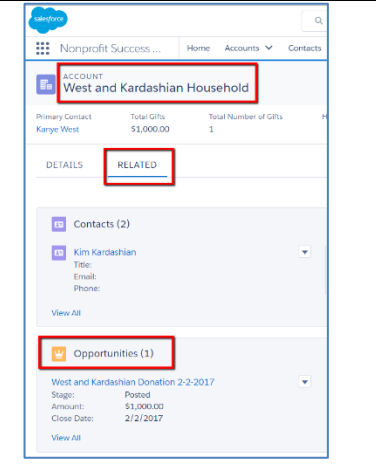
Note: Sometimes you will want to capture additional information about a Donation, for example if you wanted to indicate that the Donation was a Tribute. In this case you would need to open the Donation record on the Opportunity object and edit it further.

Where to Find Donation Information

When you create a donation, it will be visible in three places:

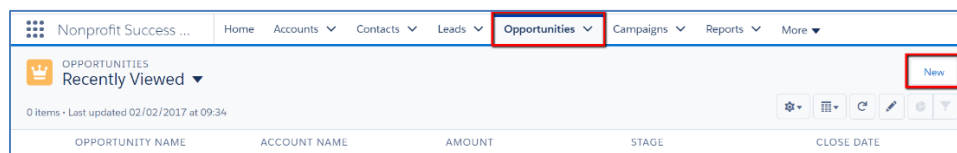
- on the Contact object
- the Opportunity object
- the Account (Household) object

In addition, it will be visible on the Contact object of all members of the Household that made the donation. This is for convenience in reporting, and should not be confused with any duplication of the donation record.

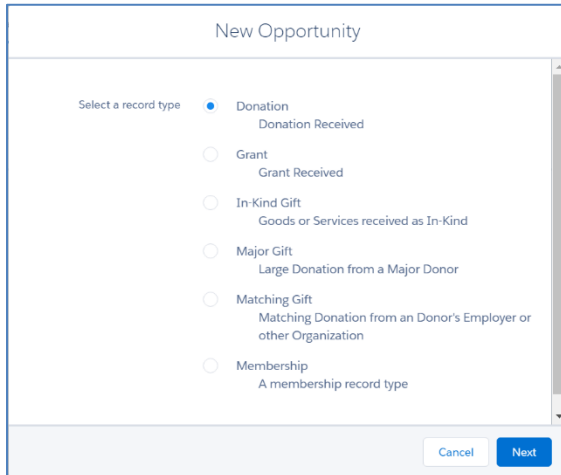
Contacts On the Related Lists page	Opportunity	Account (Household) On the Related Lists page
		

Entering a Donation from the Opportunity Object

- Click Opportunities
- Click New
- (Or use the Opportunities down arrow)



Select the Opportunity Type (Donation)



New Opportunity

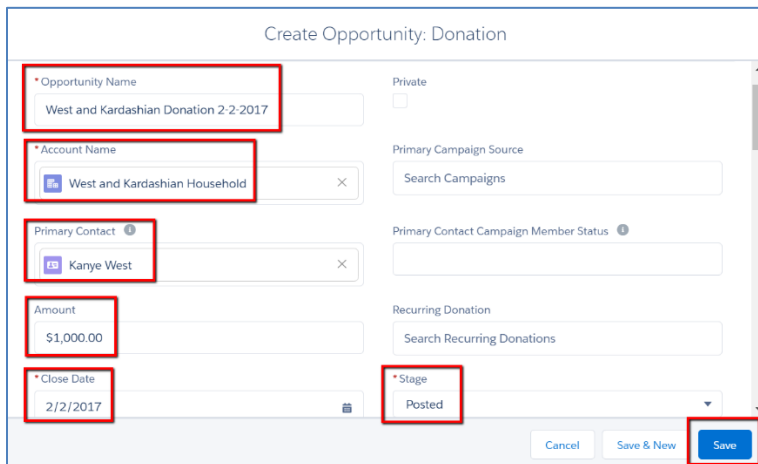
Select a record type

- ☒ Donation
Donation Received
- ☐ Grant
Grant Received
- ☐ In-Kind Gift
Goods or Services received as In-Kind
- ☐ Major Gift
Large Donation from a Major Donor
- ☐ Matching Gift
Matching Donation from an Donor's Employer or other Organization
- ☐ Membership
A membership record type

Cancel Next

Complete the following fields:

- Required:
 - Opportunity Name = West and Kardashian Donation 2/2/2017
 - Account Name = West and Kardashian Household
 - Close Date = Today
 - Stage = Posted ("Posted" = money in hand)
- Optional but Recommended
 - Amount
 - Primary Contact



Create Opportunity: Donation

* Opportunity Name
West and Kardashian Donation 2-2-2017

Private
☐

* Account Name
West and Kardashian Household

Primary Campaign Source
Search Campaigns

Primary Contact
Kanye West

Primary Contact Campaign Member Status

Amount
\$1,000.00

Recurring Donation
Search Recurring Donations

* Close Date
2/2/2017

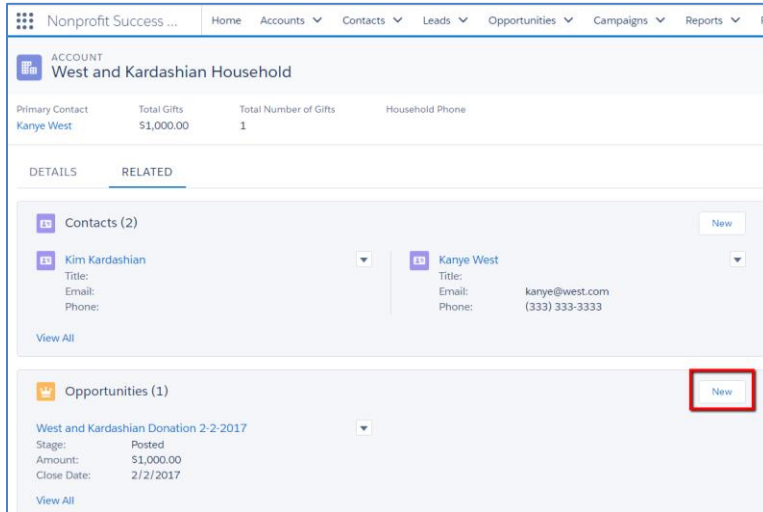
* Stage
Posted

Cancel Save & New Save

- Click Save

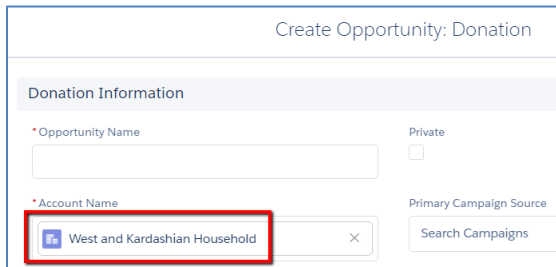
Entering a Donation from the Account Object

- Go to the West and Kardashian Household on the Account object
- Go to the Related Lists page
- Next to Opportunity click New



- Select Donation
- Click Next

Note that the Account Name populates automatically



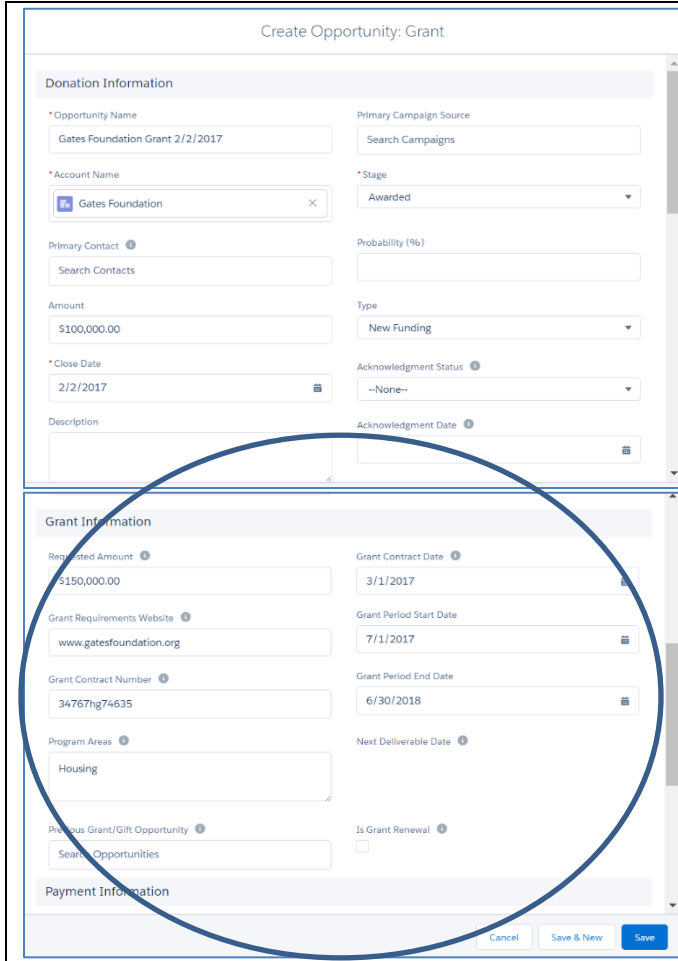
- Enter the remaining Donation information as above
- Click Save

Entering a Grant

To enter a Grant is the same as a Donation, begin with an Organization Account.

- Click on Accounts
- Click Gates Foundation
- Go to the Related Lists page
- Click New next to Opportunities
- Click Grant

The Grant Opportunity record contains additional fields that are appropriate for a grant:



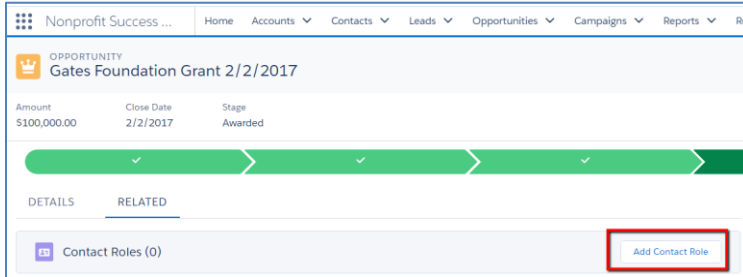
The screenshot shows the 'Create Opportunity: Grant' form. The 'Grant Information' section is circled in blue. It includes fields for Requested Amount (\$150,000.00), Grant Contract Date (3/1/2017), Grant Period Start Date (7/1/2017), Grant Period End Date (6/30/2018), Program Areas (Housing), and Is Grant Renewal (unchecked). Other sections include Donation Information and Payment Information.

Contact Roles (“Soft Credit”)

Many organizations have an expectation that Board members will either donate themselves or solicit donations from others. To record when someone is responsible for a donation without actually being the donor, you can use Contact Roles.

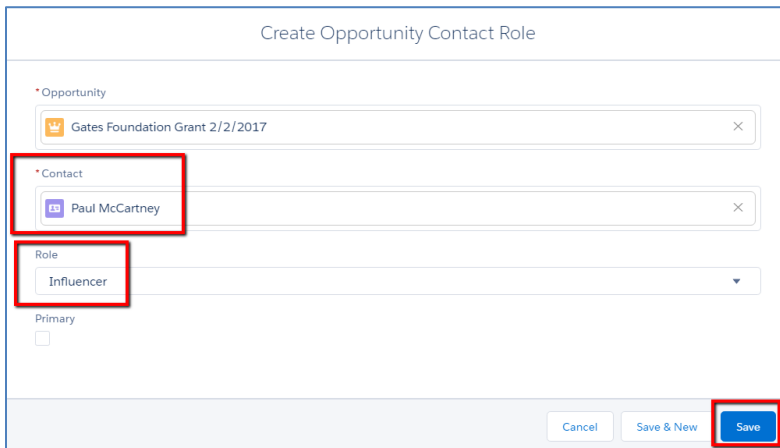
Imagine that Paul McCartney helped you get the grant from the Gates Foundation. To give him credit:

- Open the Opportunity record for the grant
- Click Related Lists
- Click Add Contact Role

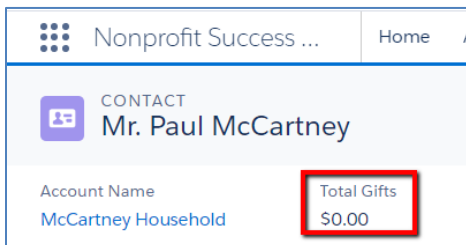


Note: the Opportunity Name populates automatically

- Enter Paul McCartney in the Contact field
- Enter Influencer from the picklist under Role
- Click Save



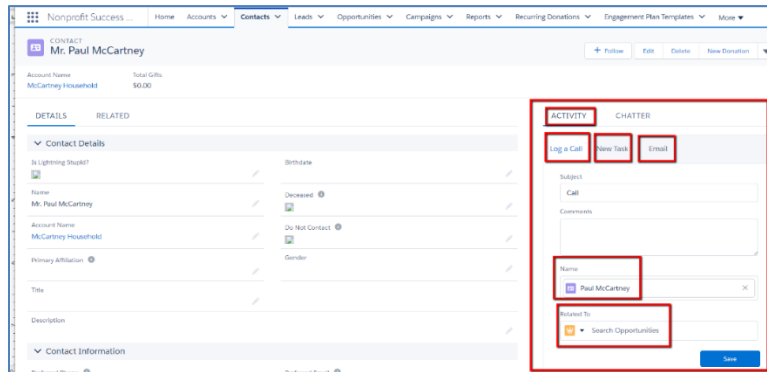
- The opportunity will be listed on Paul McCartney's Related Lists page.
- However, the amount will not show up in Total Gifts since Paul McCartney is not the actual donor.



Note: When one member of a Household gives a donation, all other members receive the Contact Role of Household Member.

ACTIVITIES: ACTION ITEMS FOR YOUR SALESFORCE DATA

The Activity Pane

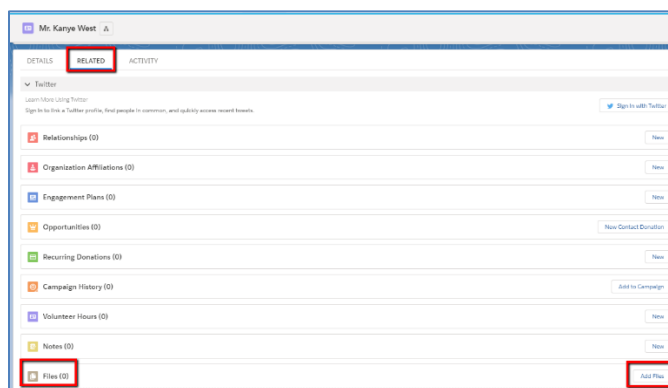


The right-hand side of the screen in any record (including Contacts, Accounts, Opportunities, etc.) is devoted to Activities. Their purpose is to make it easy to act on the data you have stored in Salesforce. With a few clicks you can

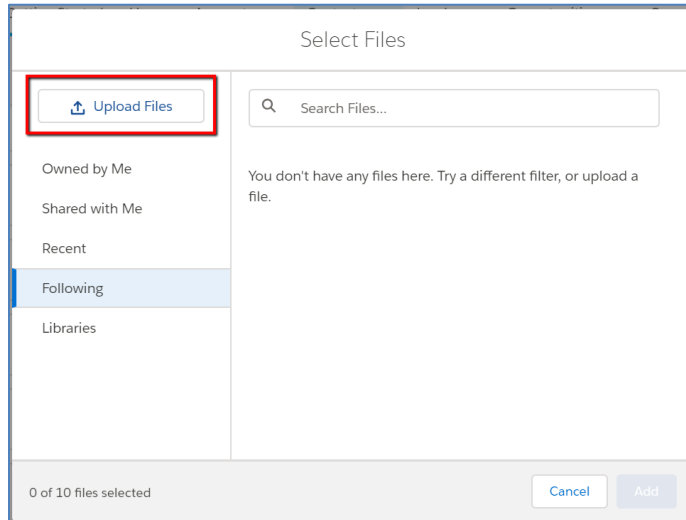
- **Log a Call:** Make notes after completing a call so your colleagues can see what you discussed
- Create a **New Task:** make a reminder for yourself or a colleague to follow up on the selected record
- **Email:** send a quick email to the person on the record

Files

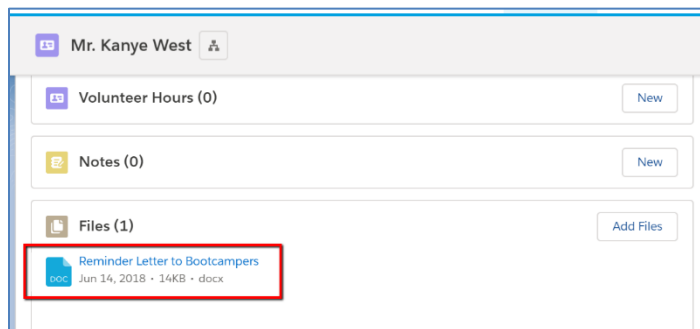
The **Files** link is on the **Related** page. This allows you to attach files to a Salesforce record in pdf, Word Excel and many other formats:



- Click Add Files and select the relevant file from your computer.



- It will be available to you or your colleagues whenever you want to see it.

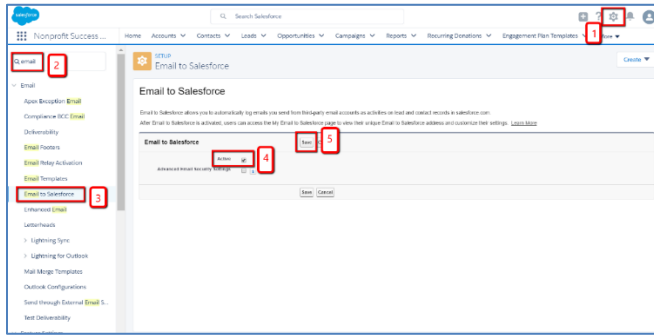


Attaching Emails to a Salesforce Record Automatically

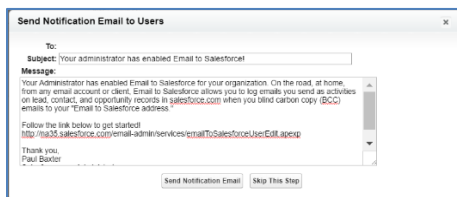
“Email to Salesforce” allows you to attach a copy to the Contact’s record when you send an email, even if you don’t send it from within Salesforce. Email to Salesforce has to be set up by the System Administrator first, then each User can activate it.

Setting up Email to Salesforce

1. Click the Setup icon
2. Type “Email” in the Setup Search Bar
3. Click “Email to Salesforce”
4. Click Edit and select the Active checkbox
5. Click Save

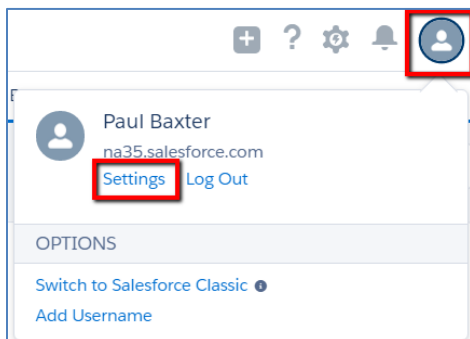


6. Salesforce will ask if you want to send the following Notification to all Users



Activating Email to Salesforce for Each User

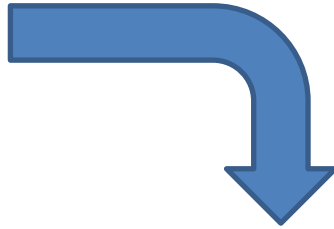
- Click the Profile icon
- Click Settings



- Click Email
- Click My Email to Salesforce
- Send an email from the "Acceptable email address"
- Include the long link listed in this page in the BCC: field.

Quick Find

- My Personal Information
 - Advanced User Details
 - Approver Settings
 - Authentication Settings for E
 - Change My Password
 - Connections
 - Grant Account Login Access
 - Language & Time Zone
 - Login History
- Personal Information
- Reset My Security Token
- Security Central
- Display & Layout
- Email**
- My Email Settings
- My Email to Salesforce**



My Email to Salesforce

If you use a company provided or third party email address, use Email to Salesforce to save emails as activities on lead, contact, opportunity, and other records in Salesforce.com.

- Send your email from an email address specified in My Acceptable Email Addresses.
- Send 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.

Your Email to Salesforce address: [emailtosalesforce@15d27cde2xhneqbgto6pv69kor...@salesforce.com](mailto:emailtosalesforce@15d27cde2xhneqbgto6pv69kor...)

My Email to Salesforce [Save] [Cancel]

Enter the Email to Salesforce address in the BCC line of emails that you want to add to the activity history of related records. This is an automatically generated email address.

Email to Salesforce Address: emailtosalesforce@15d27cde2xhneqbgto6pv69kor...@salesforce.com

My Acceptable Email Addresses

Enter all email addresses that you use to email leads and contacts, organized by domain. Only emails sent from an email address you specify below can be added to the activity history of related records.

My Acceptable Email Address: paul@501partners.com

- This will attach the email to the Contact record of the recipient.
- After the first time you send it, your email app will remember it so you don't have to type it out. Just type "emailto" and it will auto-fill

Congratulations

To: kanye@west.com

Bcc: emailtosalesforce@15d27cde2xhneqbgto6pv69kor...

Congratulations

Nice Job at the Grammys!
Paul

Paul Baxter
Salesforce Consultant and Trainer for Nonprofits
501 Partners LLC
Email: paul@501partners.com
Phone: (617) 515-0506
Office: 164 Canal Street, 5th Floor
Boston MA 02114

Send

UPLOADING CONTACT AND DONATION DATA

The NPSP Data Import Object allows you to import and update Contacts, Accounts, and Donations all in a single process. The NPSP Data Import Object has the potential to be a huge time-saver for organizations that have frequent events. It is especially useful to organizations that don't have a lot of customizing, although it can accommodate custom fields on any of these objects.

One caveat -- it can only be used with NPSP 3.0 and the Household Account. And as always, before doing any data migration work, do a Data Export and practice first in a Sandbox.

The Data Imports Custom Object will accept 2 contacts, join them in a Household, and allow you to attach donations in a single operation. Best of all, the Data Imports Object has logic to permit the same donor to give multiple donations without duplication. This means that if you have an event you don't need to separate current donors from new donors before uploading the data, and you don't need to de-duplicate every time you upload after an event

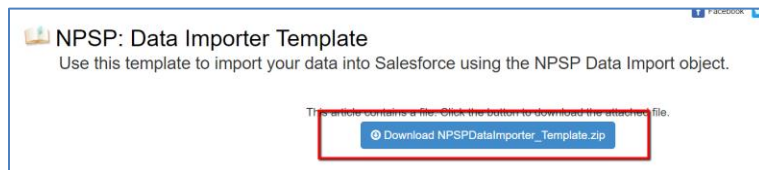
The process is somewhat different than a conventional Data Loader because the data does not initially get stored in standard objects. Instead it first goes to a custom object (the NPSP Data Import Object):

1. Arrange data in Data Importer Template
2. Use the Data Import Wizard to upload data from the Template into the NPSP Data Import Object
3. Transfer the data in the Object to Standard Objects: Account, Contact, and Opportunity

Download the Data Import Template

The key to using the NPSP Data Import tool is that the data must be formatted in a very specific way before you can upload it. To ensure the data is correctly formatted, use the "NPSP Data Import Template.csv," which is available on the Power of Us hub. Google it or go to:

<https://powerofus.force.com/articles/Resource/NPSP-Data-Importer-Documentation>



- Click the button to download and extract a csv file
- Save the file on your local computer
- Insert your data into the template
- The Template has 66 fields that contain the following information:
 - Contact 1 Name And Phone Info
 - Contact 2 Name And Phone Info
 - Account1 Name (Don't Use) Address Info
 - Account2 Name (Don't Use) Address Info
 - Home Address Info
 - Donation Info
 - Campaign Info (For Donation Or Campaign Member Upload)
 - Payment Info

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1	Contact 1
1	Mr.	Kanye	West	4/4/1988	Rapper	kanye@w.kanye@rapper.com	Work	3333333333	4.444+09	5555555555	6666666666	Mobile	Ms.	Kim	Kardashian	5/5/1988	Empress		
2	Mr.	Kanye	West	4/4/1988	Rapper	kanye@w.kanye@rapper.com	Work	3333333333	4.444+09	5555555555	6666666666	Mobile	Ms.	Kim	Kardashian	5/5/1988	Empress		

NOTES

- If you are entering contacts, DO NOT enter a Household or Account Name; these will be auto-generated by the NPSP

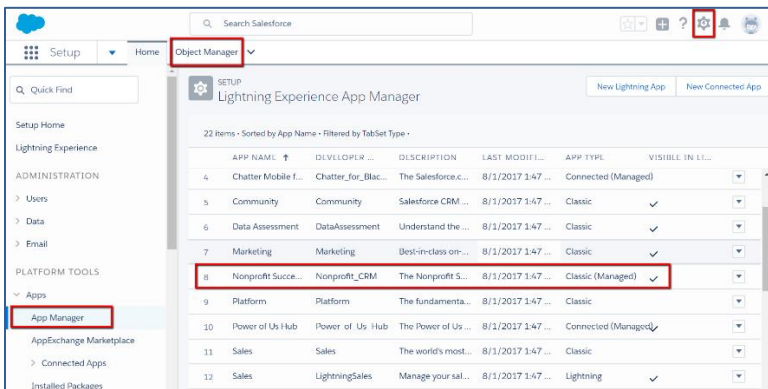
Add the NPSP Data Imports Custom Object to Your Tab Bar

Click the Setup Icon

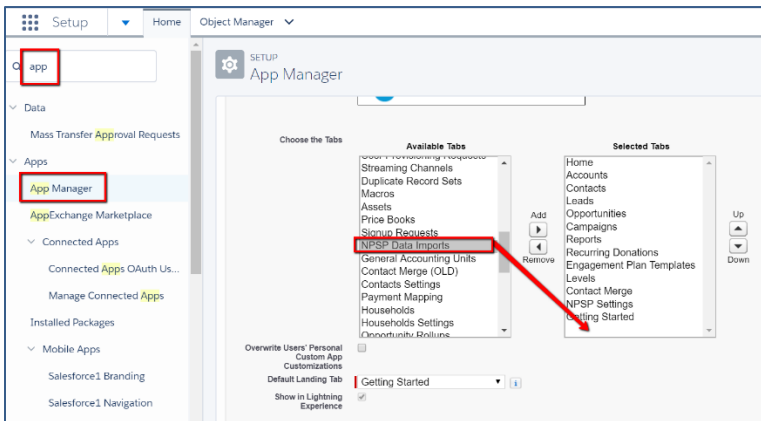
Click the App Manager

Click the Nonprofit Success Pack app

Click Edit (down arrow)

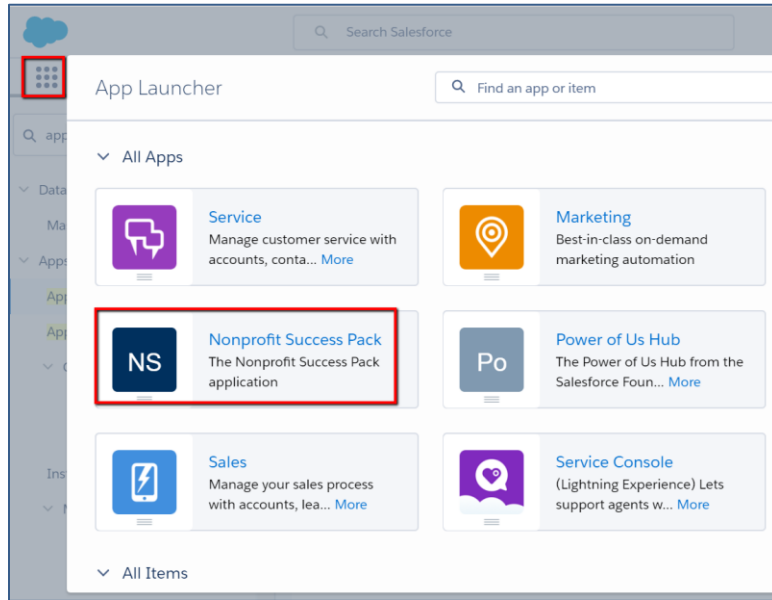


Drag NPSP Data Imports from Available Tabs to Selected Tabs



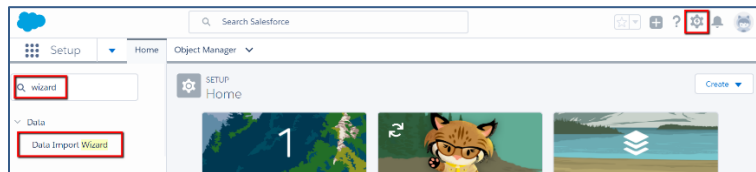
To return to the editing screen:

- Click the Apps Square
- Click Nonprofit Success Pack

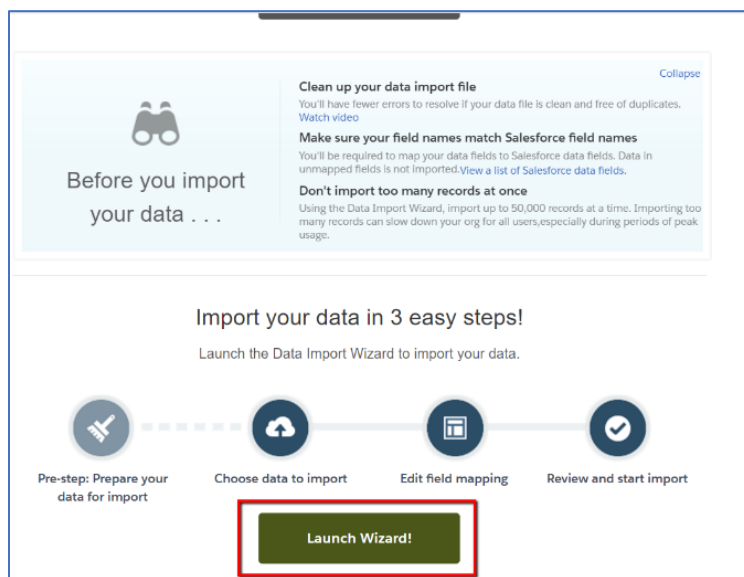


Upload data into the NPSP Data Imports Custom Object

- Click Setup >> Data Import Wizard



- Click Launch Wizard



- In the column What kind of data are you importing? Section, click Custom Objects (NOT Contacts or Accounts)
- Scroll down and select NPSP Data Imports

Affiliations Settings	>
Households	>
Households Settings	>
Opportunity Rollup Errors	>
User Rollup Field Settings	>
Address Verification Settings-DEPRECATED	>
Addresses	>
GAU Allocations	>
Allocations Settings	>
Batch Data Entry Settings	>
Batches	>
NPSP Data Imports	>
Data Import Settings	>

- In the column “what do you want to do?” select Add New Records
- Leave all other fields blank
- In the column “Where is your data located” click Choose File
- Select the template with your data
- Click Next
- The Wizard will automatically map the data in your csv file, but you also get the chance to map the fields manually
- Click Next

Edit Field Mapping: NPSP Data Imports				
Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.				
Edit	Mapped Salesforce Object	CSV Header	Example	Example
Change	Contact1 Salutation	Contact1 Salutation	Mr.	Mr.
Change	Contact1 First Name	Contact1 First Name	Kanye	Kanye
Change	Contact1 Last Name	Contact1 Last Name	West	West
Change	Contact1 Birthdate	Contact1 Birthdate	4/4/1988	4/4/1988
Change	Contact1 Title	Contact1 Title	Rapper	Rapper
Change	Contact1 Personal Email	Contact1 Personal Email	kanye@west.com	kanye@west.com
Change	Contact1 Work Email	Contact1 Work Email	Kanye@potus.com	Kanye@potus.com
Change	Contact1 Alternate Email	Contact1 Alternate Email		
Change	Contact1 Preferred Email	Contact1 Preferred Email	Work	Work
Change	Contact1 Home Phone	Contact1 Home Phone	3333333333	3333333333
Change	Contact1 Work Phone	Contact1 Work Phone	4444444444	4444444444
Change	Contact1 Mobile Phone	Contact1 Mobile Phone	5555555555	5555555555
Change	Contact1 Other Phone	Contact1 Other Phone	6666666666	6666666666
Change	Contact1 Preferred Phone	Contact1 Preferred Phone	Mobile	Mobile

- Review the file

- Type of Import (New Records)
- Number of Fields
- Name of csv File

Review & Start Import

Review your import information and click Start Import.

Help for this page

Your selections:

- NPSP Data Imports ✓
- Add new records ✓
- trial data for data template.csv ✓

Your import will include:

Mapped fields: 66

Your import will not include:

Unmapped fields: 0

Cancel Previous **Start Import**

- Click Start Import
- You get the message that the import has started

Congratulations, your import has started!

Click OK to view your import status on the Bulk Data Load Job page.

OK

- Review Load Job

Bulk Data Load Job
7504600000WKfJ

View the details of a bulk data load job.

[Back to List: Bulk Data Load Jobs](#)

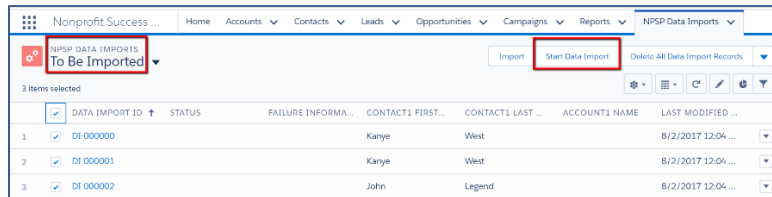
Bulk Data Load Job Detail				Reload
Job ID	7504600000WKU	Status	Closed	Total Processing Time (ms) 68
Submitted By	Paul Baxter	Operation	Insert	API Active Processing Time (ms) 38
Start Time	4/3/2017 11:52 AM PST	Queued Batches	0	Apex Processing Time (ms) 0
End Time	4/3/2017 11:52 AM PST	In Progress Batches	0	
Time to Complete (hh:mm:ss)	00:00	Completed Batches	1	
Object	NPSP Data Import	Failed Batches	0	
External ID Field		Progress	100%	
Content Type	CSV	Records Processed	2	
Concurrency Mode	Parallel	Records Failed	0	
API Version	39.0	Retries	0	

Reload

Batches											
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	Status
View Request	View Result	7514600000Ulex	4/3/2017 11:52 AM	4/3/2017 11:52 AM	68	38	0	2	0	0	Completed

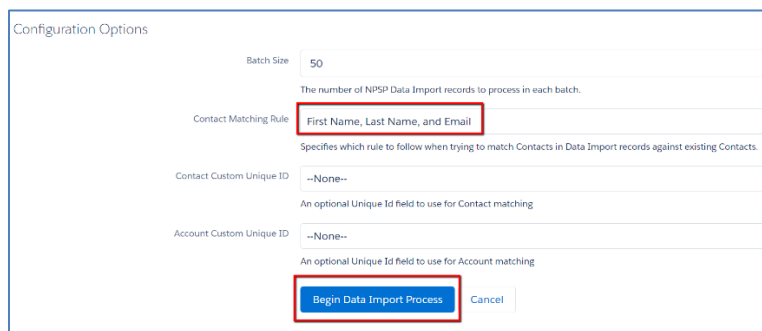
Transfer data in the Object to Standard Objects: Account, Contact, and Opportunity

- Click on the NPSP Data Imports tab
- Change the View to “To Be Imported” (if necessary)
- Click “Start Data Import”



DATA IMPORT ID	STATUS	FAILURE INFORMATION	CONTACT1 FIRST...	CONTACT1 LAST ...	ACCOUNT1 NAME	LAST MODIFIED ...
DI 0000000			Kanye	West		8/2/2017 12:04 ...
DI 0000001			Kanye	West		8/2/2017 12:04 ...
DI 0000002			John	Legend		8/2/2017 12:04 ...

- Click Begin Data Import Process
- Note that if you want to change the default matching rule, you can do it here



Configuration Options

Batch Size: 50
The number of NPSP Data Import records to process in each batch.

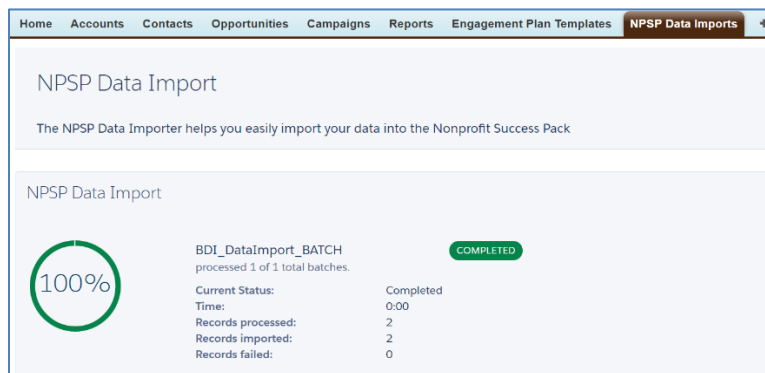
Contact Matching Rule: **First Name, Last Name, and Email**
Specifies which rule to follow when trying to match Contacts in Data Import records against existing Contacts.

Contact Custom Unique ID: --None--
An optional Unique Id field to use for Contact matching

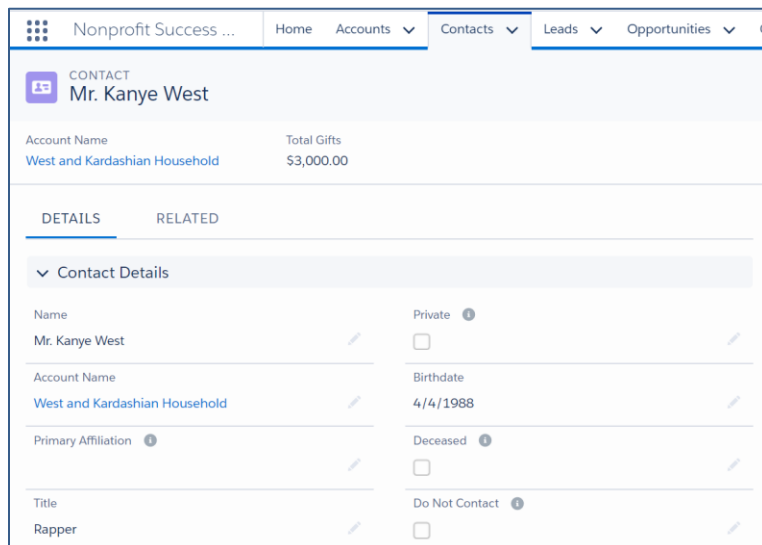
Account Custom Unique ID: --None--
An optional Unique Id field to use for Account matching

Begin Data Import Process Cancel

- The Data Imports tool indicates when the process is complete



- Review your data to ensure it was uploaded correctly



Adding Data to Custom Fields

You can use the NPSP Data Import Object to populate custom fields on the Contact, Account, or Opportunity Objects. To do so you must enter the custom fields into the template and also into the Custom Object itself

Creating Custom Fields in the Template

- The Template contains 66 fields, from column A to column BN. You can remove fields you will not be using in your data upload
- The name of the custom field must include the Object its data will be connected to: Contact1, Contact2, Account1, Account2, etc.:

BI	BJ	BK	BL	BM	BN	BO
Donation Membership End Date	Donation Membership Origin	Campaign Name	Campaign Member Status	Payment Check/Reference Number	Payment Method	Contact1 Language
						Mandarin

Creating Custom Fields on the Data Import Object

Field names must be formatted in a very specific way to allow the Data Import to receive data and pass it to the standard objects

Create the custom field on the standard object

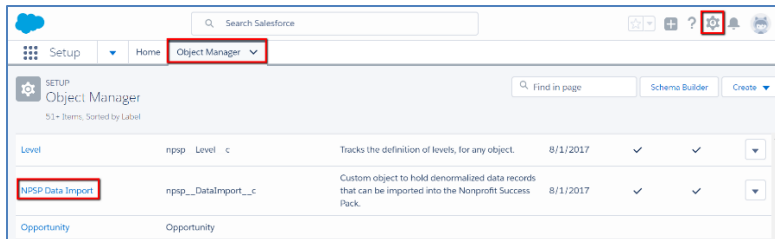
- Using the force.com menu or the Setup link, create the field where you want the data ultimately to live, i.e. the Contact or Account Object
- You **do not** need to include the Object name in the Field name (e.g. Say "Language" instead of "Contact1 Language," as in the template above)
- Click Next>Next>Save
- Go to the "Contact Fields" screen (you will be sent there after saving)
- Note that when you create the field name, an API Name is also created. For the field "Language," for example, the API Name is "Language__c"
- (A custom field's API Name always ends in "underscore-underscore-c")

- Copy the API Name to your Notepad for use later

Language	Language__c	Picklist
----------	-------------	----------

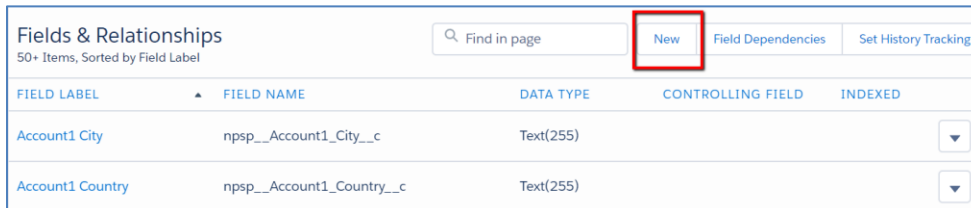
Create the custom field on the Data Import object

- Click Setup
- Click Object Manager
- Click NPSP Data Import



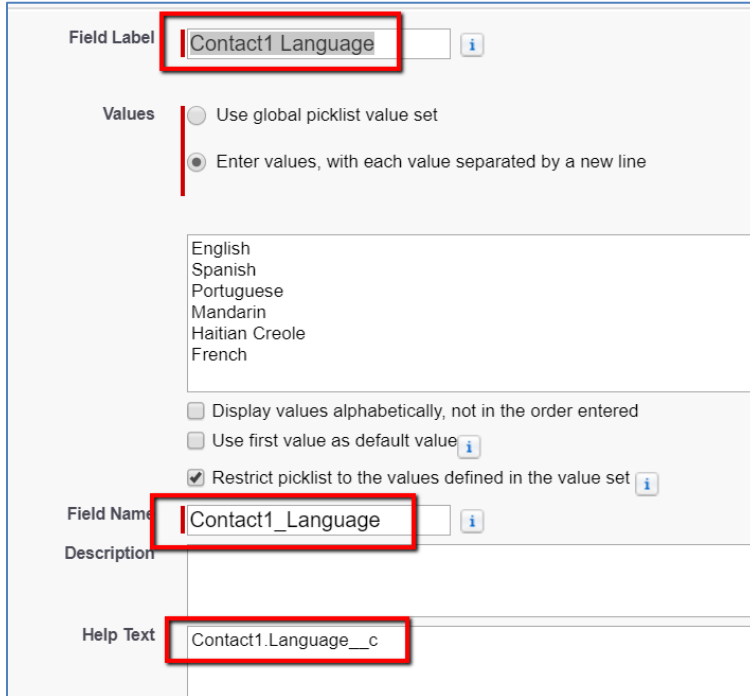
Level	np__Level__c	Tracks the definition of levels, for any object.	8/1/2017	✓	✓	▼
NPSP Data Import	np__DataImport__c	Custom object to hold denormalized data records that can be imported into the Nonprofit Success Pack.	8/1/2017	✓	✓	▼
Opportunity	Opportunity					

- Click Fields and Relationships
- Click New



Fields & Relationships		Find in page	New	Field Dependencies	Set History Tracking
50+ Items, Sorted by Field Label					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Account1 City	np__Account1_City__c	Text(255)		▼	
Account1 Country	np__Account1_Country__c	Text(255)		▼	

- Create a field that is the same type as the field on the Standard Object you just created (i.e. picklist)
- Name the field as follows:
 - Field Label: Contact1 Language
 - Field Name: Contact1_Language
 - Help Text: Contact1.Language__c



Field Label: **Contact1 Language**

Values:

- ☐ Use global picklist value set
- ☒ Enter values, with each value separated by a new line

English
Spanish
Portuguese
Mandarin
Haitian Creole
French

☐ Display values alphabetically, not in the order entered

☐ Use first value as default value

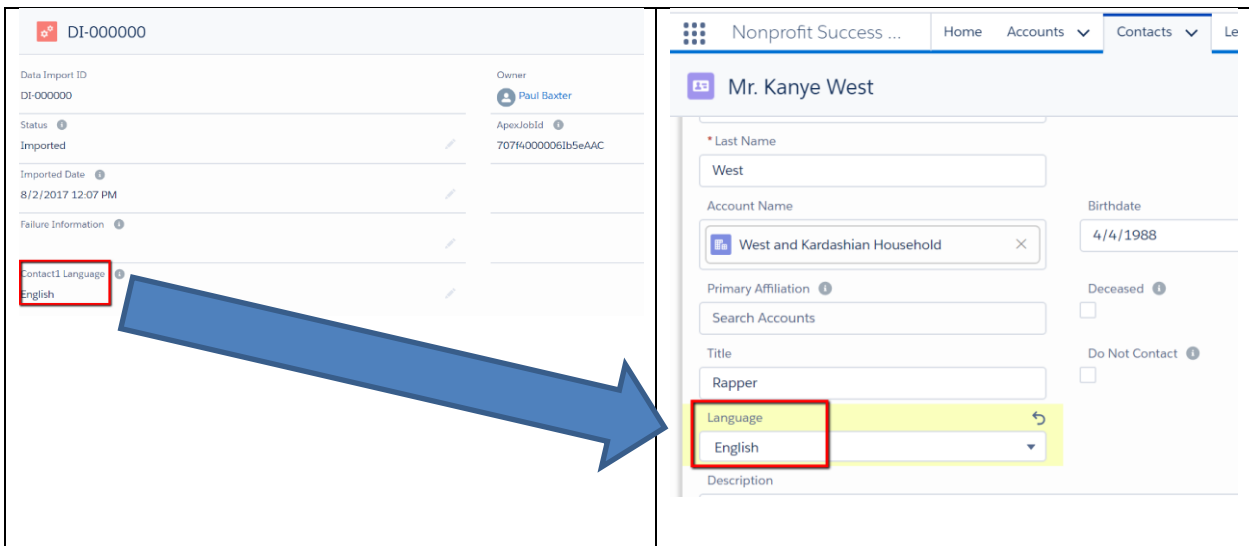
☒ Restrict picklist to the values defined in the value set

Field Name: **Contact1_Language**

Description:

Help Text: **Contact1.Language__c**

- The Help Text is necessary for the custom field to work. Notice that you use the Object Name and the API Name to create the Help Text
- Click Next>>Next>>Save
- Now populate the Template with your data, including the custom data, and upload as above



DI-000000

Data Import ID: DI-000000

Status: Imported

Imported Date: 8/2/2017 12:07 PM

Failure Information:

Owner: Paul Baxter

ApexJobId: 707W0000061b5eAAC

Contact1 Language: English

Mr. Kanye West

Last Name: West

Account Name: West and Kardashian Household

Birthdate: 4/4/1988

Primary Affiliation: Search Accounts

Title: Rapper

Language: English

Description:

Updating Data with the NPSP Data Import Object

The Data Import Object's logic allows it to update data and even to take a spreadsheet with a mix of new and updated data and create all the necessary changes in a single upload. The important thing to remember is that the upload is a three part process (create template; upload to NPSP Data Import Object; Migrate data to Standard Objects. The process to distinguishing imports from updates does not



occur until the third step. Therefore you follow **exactly the same process** whether the data is all new, all updates or a combination of the two.

The Data Import Object will automatically examine incoming records to determine whether they are new and need to be created or existing and need to be matched to current records.

The default matching rule is First Name, Last Name and Email, but can change this to just First and Last, First, Last and Phone, etc. before beginning the import.

A screenshot of a web-based configuration window titled "Configuration Options". It contains several settings for a data import process. The "Batch Size" is set to "50". Below it, a description states "The number of NPSP Data Import records to process in each batch." The "Contact Matching Rule" is set to "First Name, Last Name, and Email", which is highlighted by a red rectangular box. A description below this rule states "Specifies which rule to follow when trying to match Contacts in Data Import records against existing Contacts." Below this, there are two dropdown menus: "Contact Custom Unique ID" and "Account Custom Unique ID", both currently set to "--None--". Descriptions for these fields state "An optional Unique Id field to use for Contact matching" and "An optional Unique Id field to use for Account matching" respectively. At the bottom of the window are two buttons: "Begin Data Import Process" (in blue) and "Cancel" (in grey).

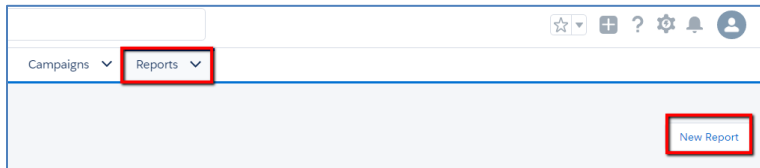
REPORTS

Creating a Report of Constituents

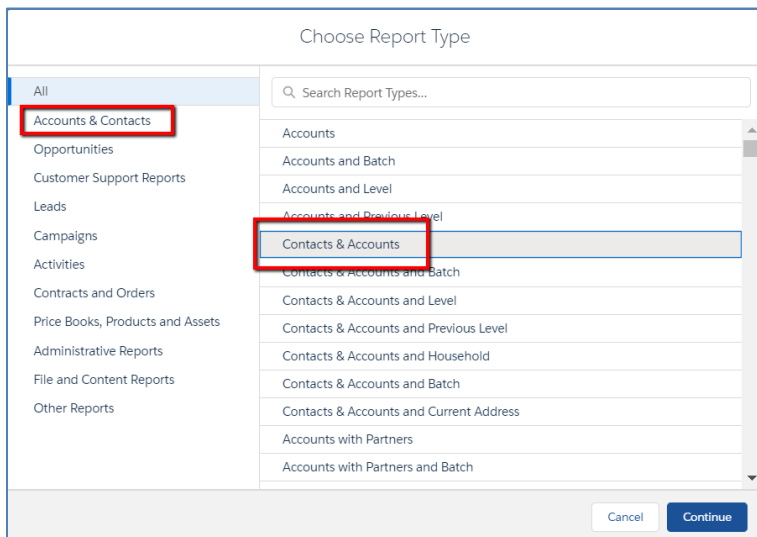
You can create original reports based on any object in Salesforce. The most common to use are Contact, Account (Organization) and Opportunity (Donation)

To create a Constituent (Contact) report:

- Click Reports
- Click New Report

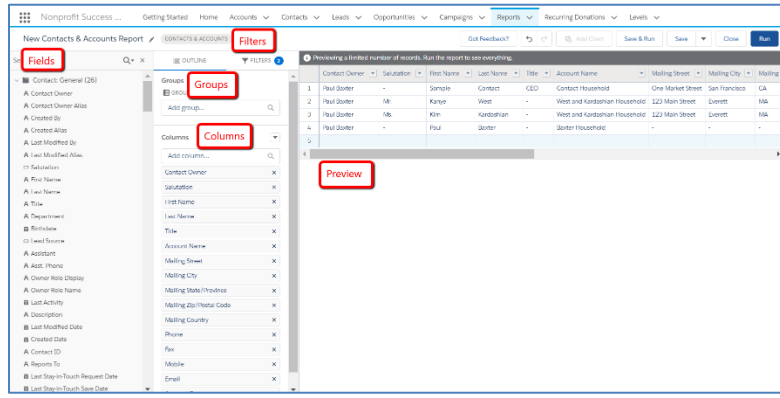


- From the Choose Report Type window select Account & Contacts
- Select the “Contacts and Organizations” template
- Click Continue



This will open the Report Editing screen. There are five main elements to the Report Editing screen:

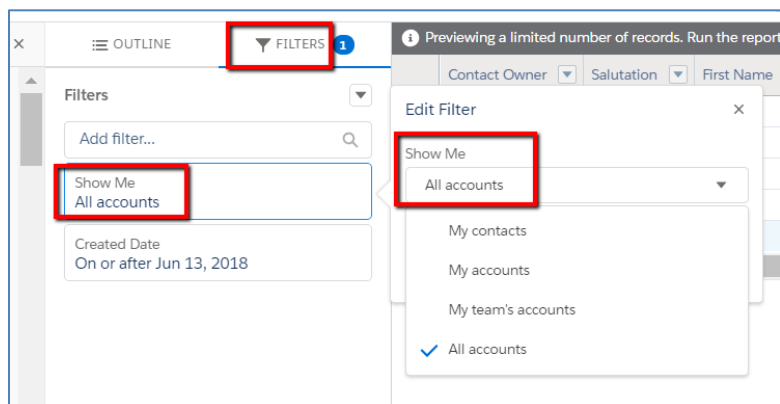
- **Fields** – a list of all available fields on the object you selected. In this case it will include all fields on the Contact and Account objects, including all custom objects. Any of these can be used in the report
- **Columns** – a list of the fields that are part of your report.
- **Groups** – You can summarize or cluster your data with Groups. Only reported that are grouped can be made into charts or dashboard elements (see below)
- **Filters** – Set criteria to specify subgroups of your data (see below)
- **Preview** – Lets you see a sample report. However it will only be based on a set of 50 records



- The **Preview** pane shows what your report will look like. Note that it is based on only 50 records; it will not give you complete information.
- The **Fields** pane contains every field associated with the Object you have selected for your report. It allows you to add or remove fields.
- The **Filters** pane allows you to set criteria to specify subgroups of your data (see below)

When you first build a report, you will typically want to ensure that you are seeing ALL the records available.

- Click the Filters link
- Use the drop-down arrow to change Show Me from “My Contacts” to “All Accounts”
- Click Apply
- Click to Created Date link
- Use the drop-down arrow to change the Range to “All Time”
- Click Apply
- This will ensure that you are seeing all the records in your Salesforce, not just ones you have created or within a certain time period
-

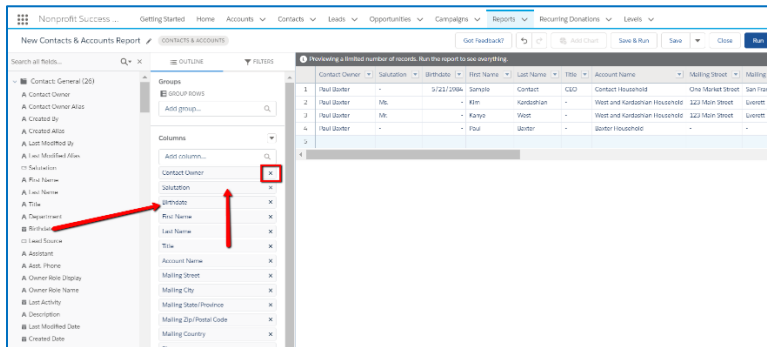


Selecting Fields to Appear on your Report

To add or remove fields from your report

- Click Outline to make the Columns pane visible
- Drag and drop from Fields to Columns to add

- Click the x on the Column field to remove
- To change the order of the columns reorder in Columns pane



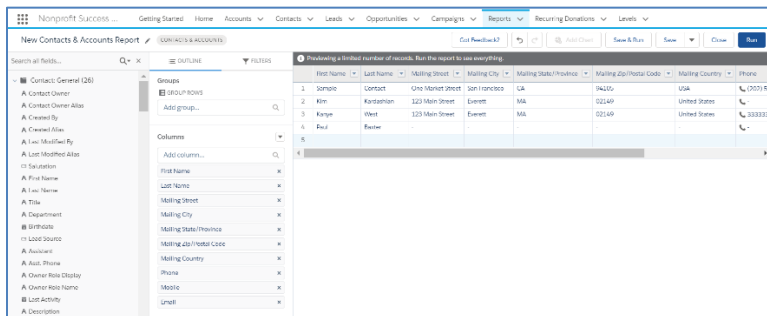
Add (or keep) the following fields in your report:

- First Name
- Last Name
- Mailing Street
- Mailing City
- Mailing State/Province
- Mailing Zip/Postal Code
- Phone
- Mobile
- Email

Remove the following fields from your report:

- Salutation
- Title
- Mailing Country
- Fax
- Organization Owner
- Organization Name

Your report will look like this:



Before you can run a report, you must save it

- Click Save and Run
- Enter the Report Name = "Constituent Report"

- Enter the Report Folder = “Private Reports”
- Click Save

Now your report will look like this:

REPORT Constituent Report									
Total Records 3									
FIRST NAME	LAST NAME	MAILING STREET	MAILING CITY	MAILING STATE/PROVINCE	MAILING ZIP/POSTAL CODE	MAILING COUNTRY	PHONE	MOBILE	EMAIL
Paul	Bauer								
Sompo	Conduct	One Market Street	San Francisco	CA	94105	USA	(415) 401-3097	(415) 015-8983	sompo.conduct@gmail.com
Kira	Reckless	171 Main Street	Powell	MA	02118	United States			
Kuno	West	121 Main Street	Lowell	MA	02445	United States	(978) 451-1111		
Grand Total (3 records)									

Sorting a Report

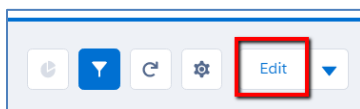
Once you create and save a report there are several tools for zeroing in on the specific information you are looking for. Sorting allows you to put your records in order according to one of the fields in the report. You can sort in editing mode or after you run the report.

To sort by Last Name

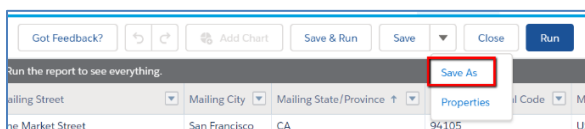
- Click the Last Name field name at the top of the report to sort A-Z (arrow points up)
- Click again to sort Z-A (arrow point down)

REPORT Constituent Report									
Total Records 200									
FIRST NAME	LAST NAME	MAILING STREET	MAILING CITY	MAILING STATE/PROVINCE	MAILING ZIP/POSTAL CODE	MAILING COUNTRY	PHONE	MOBILE	EMAIL
Spencer	Anthony	4235 E Spruce Drive	Weston	NH	03033		(798) 401-3097	(410) 015-8983	spencer@fakemail.com
Lorene	Avila	15 Lonely Pond Pike	Albany	CT	06230		(660) 290-1938	(225) 660-8611	lorene@fakemail.com
Lelia	Avila	778 Auto Mail Mount	Olympia	NY	11535		(576) 621-5994	(393) 169-7831	lelia@fakemail.com

- Return to Editing Mode by clicking Edit in the upper right-hand corner



- Sort by Mailing State/Province



- Click Save As and Name the Report “Constituents by State”
- Save in Report Folder = “Private”
- Click “Save and Run Report”

Filtering A Report

Filtering allows you to hide all records that do not match certain criteria. To filter the report only to show Massachusetts residents



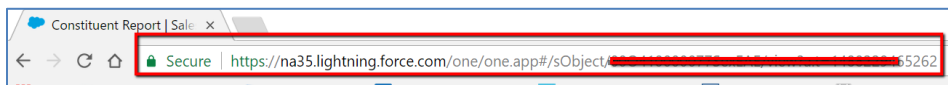
- Go to the report Constituents by State
- Click Edit to go to the Editing Mode
- Click Filters
- In the Quick Find box, type **Mailing State/Province**
- In the drop-down, type Mailing State/Province equals MA
- Click Apply
- Click Save and Run
- The filter will hide all records of Constituents who are not from Massachusetts
- Click Save As and Name the Report “Constituents from MA”
- Click Save and Run Report

REPORT					
Constituents from MA					
Total Records 73					
FIRST NAME	LAST NAME	MAILING STREET	MAILING CITY	MAILING STATE/PROVINCE	MAILING ZIP/POSTAL CODE
Jane	Barnes	8234 Market St.	Churdan	MA	02111
Mandy	Barnett	12 Colonial Branch Court	Los Arrieros	MA	02715
Tomas	Bender	37811 N 81th Ave.	Little Falls	MA	02715
Bonita	Booker	776 Dewy Cottage Falls	Fircrest	MA	02145
Rupert	Boyd	1 Crimson St.	Gwinn	MA	02164
Harlan	Boyer	892 Brady Road	New Madison	MA	02222
Tori	Bridges	9 Cold Bluff Corner	Fircrest	MA	02145

Sharing a Report

You may want to send the results of a report to a colleague. If that person has an account in your organization's Salesforce, there are two ways to do it.

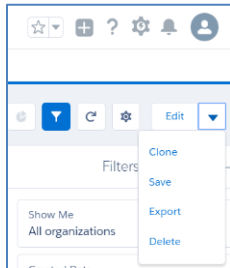
- You can simply direct them to it: “Look for ‘Constituents from MA’
- You can send them a link:
- Copy the URL from your browser and email it. The URL contains code so that only Users of your Salesforce account can open it



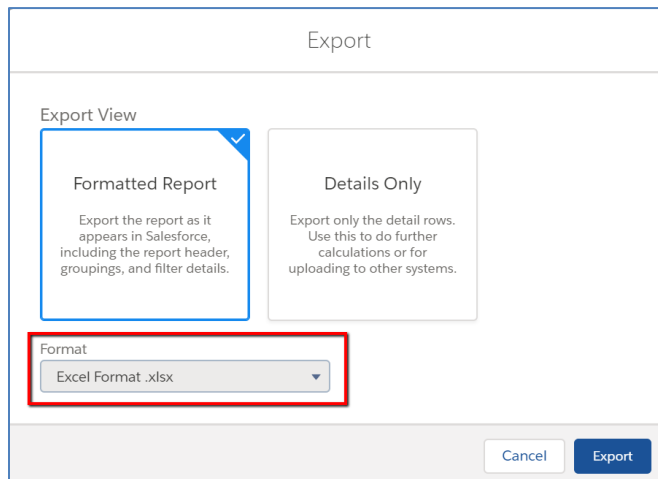
If you want to share the report with someone who does not have access to your Salesforce account, you will have to Export the Report into Excel or another spreadsheet program:

- Open the Report “Constituents from MA”
- Click the down arrow button in the upper right
- Click Export

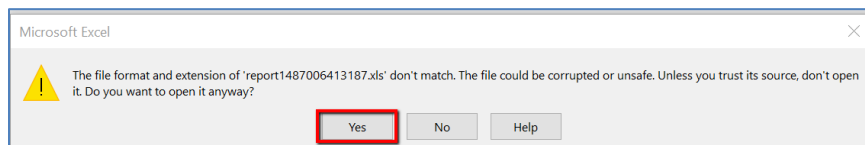




- Click Format (Excel or CSV)
- Click Export



- The file will download
- Open the download (probably in the lower left of the screen)
- You will see this message
- Click Yes



- The file will open in Excel

NOTE: Once you have exported a report it is no longer dynamic: any subsequent changes that you make in Salesforce will NOT appear in the downloaded report

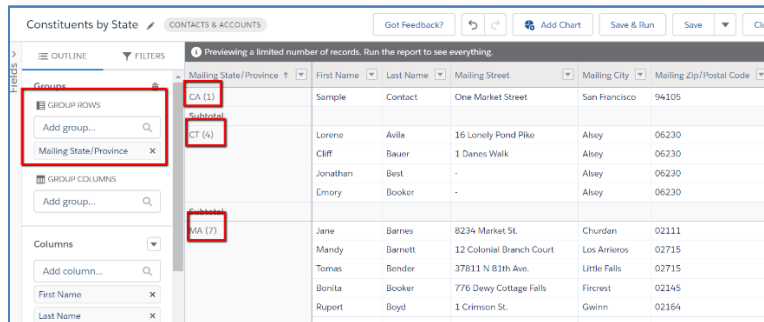
Create a Group Report

A Group Report makes it easier to gain an overview of your information

- Click Reports
- Click Constituent Report
- Click Edit

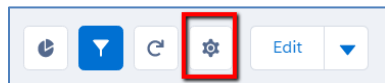


- Click Outline
- Use the Lookup under Group Rows to select Mailing State/Province

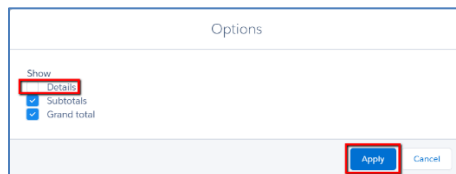


Mailing State/Province	First Name	Last Name	Mailing Street	Mailing City	Mailing Zip/Postal Code
CA (1)	Samuel	Contact	One Market Street	San Francisco	94105
CT (4)	Lorene	Avila	16 Lonely Pond Pike	Alsey	06230
	Cliff	Bauer	1 Danes Walk	Alsey	06230
	Jonathan	Best	-	Alsey	06230
	Emory	Booker	-	Alsey	06230
MA (7)	Jane	Barnes	8234 Market St.	Churden	02111
	Mandy	Barnett	12 Colonial Branch Court	Los Amigos	02715
	Thomas	Bender	37811 N 81th Ave.	Little Falls	02715
	Bonita	Booker	776 Dewey Cottage Falls	Fircrest	02145
	Rupert	Boyd	1 Crimson St.	Gwinn	02164

- Click Run
- The Group will both sort the records and provide the number of records for each State
- Click the Report Setup Icon



- Uncheck Details and click Apply



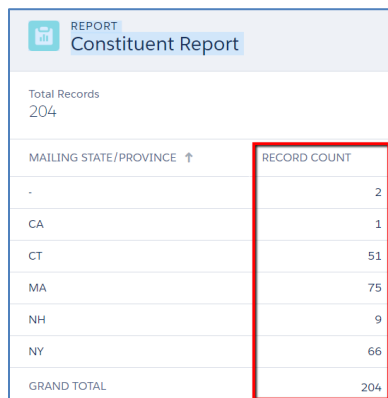
Options

Show:

- ☐ Details
- ☒ Subtotals
- ☒ Grand total

Apply Cancel

- The Report now gives the Record Count but does not show any specific records



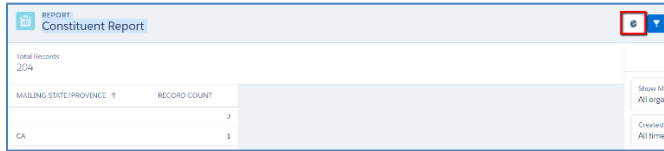
MAILING STATE/PROVINCE	RECORD COUNT
-	2
CA	1
CT	51
MA	75
NH	9
NY	66
GRAND TOTAL	204

- Click Save (under down arrow to right)

Creating a Chart

NOTE: Charts can only be created from a Group Report

From the Constituent Report, click the Toggle Chart button

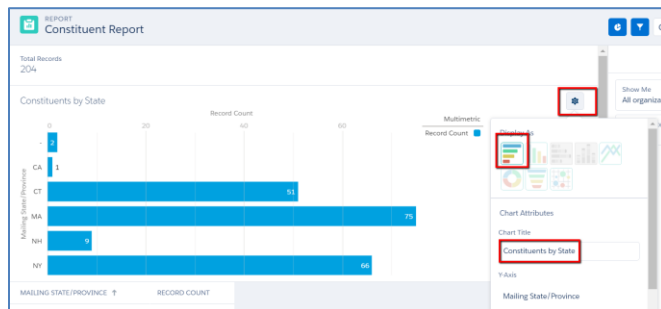


REPORT Constituent Report	
Total Records	204
MAILING STATE/PROVINCE ↑	RECORD COUNT
CA	1

This will convert the data in the Summary Report into a chart

Click the Chart Setup Icon and select

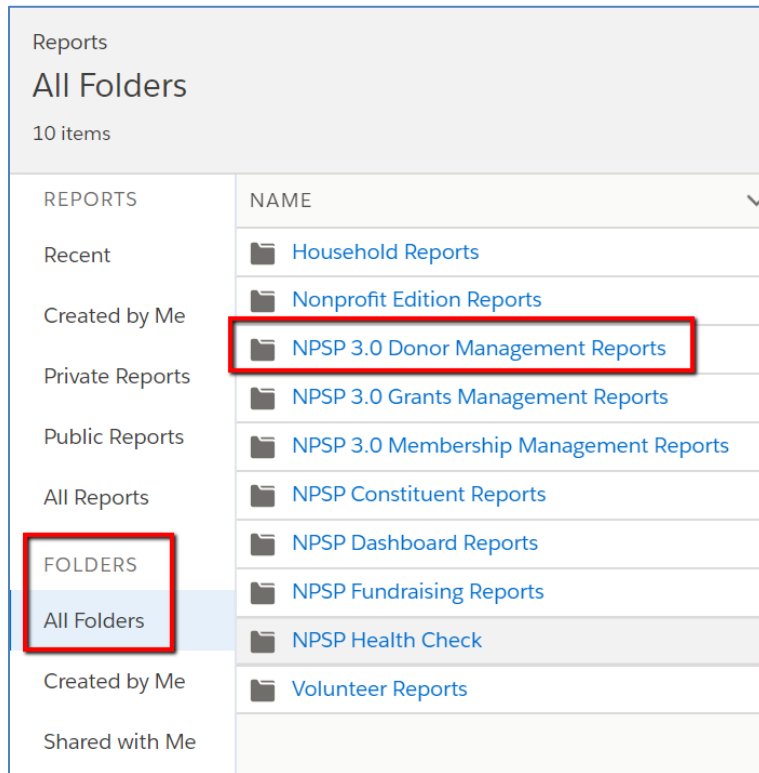
- Chart Type
- Chart Title
- Click Save (drop down arrow on right)



Pre-built Reports

Salesforce and the Nonprofit Starter Pack include dozens of pre-built reports that you can use as-is or edit and modify for your own needs.

The folder that contains some of the most useful reports for Development purposes is called **NPSP 3.0 Donor Management Reports**.



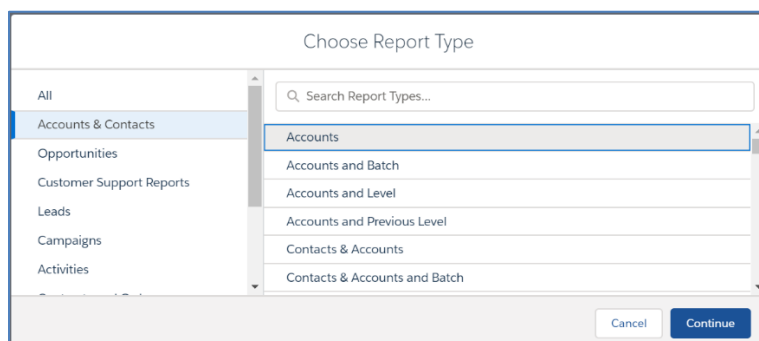
Among the reports found there are

- Contact LYBUNT (Last Year But Unfortunately Not This)
- Contact SYBUNT (Some Year But Unfortunately Not This)

Creating a Donor Mailing List

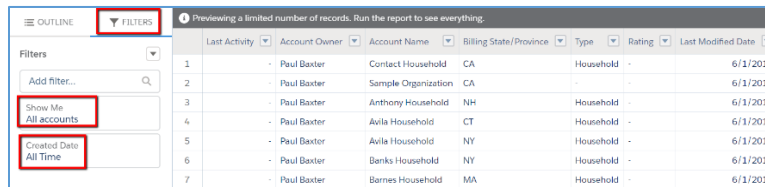
When you create a mailing list for donors, remember that all donations are attached to Accounts (Households) rather than individuals. You will therefore run an Account Report instead of a Contact (or Individual) Report

- Start with the Reports tab and Click “New Report”



- Under the “Accounts and Contacts” Folder, click “Accounts”

- If you want a complete report of all donations, be sure to select “Show: All Accounts” and “Range” All Time.” Otherwise use the Range field to limit the time frame (e.g. “This Fiscal Year” or “This Quarter”



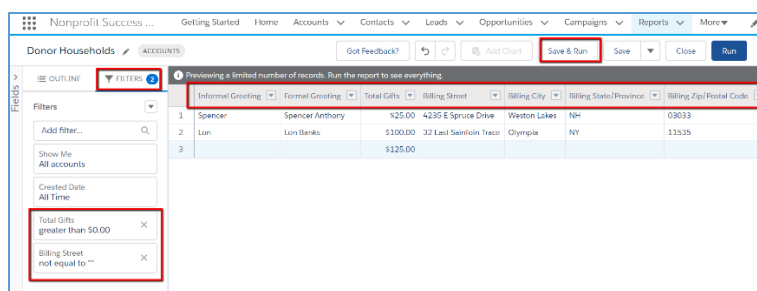
Previewing a limited number of records. Run the report to see everything.

Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	- Paul Baxter	Contact Household	CA	Household	-	6/1/2018
2	- Paul Baxter	Sample Organization	CA	-	-	6/1/2018
3	- Paul Baxter	Anthony Household	NH	Household	-	6/1/2018
4	- Paul Baxter	Avila Household	CT	Household	-	6/1/2018
5	- Paul Baxter	Avila Household	NY	Household	-	6/1/2018
6	- Paul Baxter	Banks Household	NY	Household	-	6/1/2018
7	- Paul Baxter	Barnes Household	MA	Household	-	6/1/2018

- Select the fields that you wish to include in the report by dragging them or double-clicking them in the side bar. Use the Lookup field at the top of the sidebar to find fields you don't see.
- Because this is an Account and not a Contact, use the following address fields:
 - “Billing Street”
 - “Billing City”
 - “Billing State”
 - “Billing Zip/Postal Code”

Do not use “Mailing Street,” etc.

- You can sort the list within the view by clicking on the field names
- To insert the name of the Recipient, use “Formal Greeting” and “Informal Greeting”. The First Name and Last Name fields are not available as they belong to the Contact object.
- Include Total Gifts to distinguish donors from non-donors
- Filter the Report by “Total Gifts is Greater than 0”
- To avoid wasting postage, filter by Billing Street not equal to [empty]
- Click “Save As” and give it the name Donor Households



Donor Households

Previewing a limited number of records. Run the report to see everything.

Informal Greeting	Formal Greeting	Total Gifts	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code
1	Spencer Anthony	\$25.00	4235 E Spruce Drive	Weston Lakes	NH	03088
2	Lori Banks	\$100.00	32 Leif Saintjohn Trce	Olympia	NY	11535
3		\$125.00				

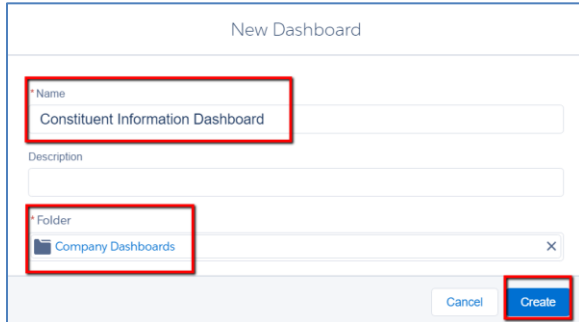
- To complete the process, Save and Run Report
- Use “Export Details” to send the data to Excel, from which you can merge the mailing addresses with Word to create letters, labels, etc.

Dashboards

A Dashboard allows you to view multiple charts on the same screen, even charts based on different reports. Like a Chart, Dashboards can only be based on Summary Reports.

- Select Dashboards Tab
- Click “New Dashboard”

- Enter Name and Folder
- Click Create



New Dashboard

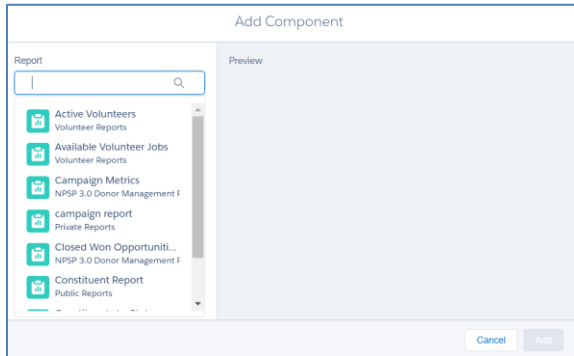
*Name
Constituent Information Dashboard

Description

*Folder
Company Dashboards

Cancel Create

- Click Add
- Select a Report to base the Dashboard on (only Group Reports will appear)



Add Component

Report

Active Volunteers
Volunteer Reports

Available Volunteer Jobs
Volunteer Reports

Campaign Metrics
NPSP 3.0 Donor Management F

campaign report
Private Reports

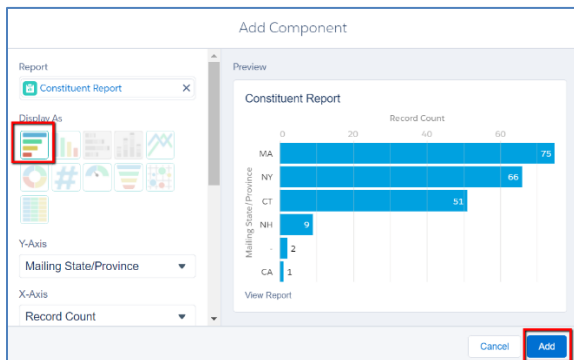
Closed Won Opportunit...
NPSP 3.0 Donor Management F

Constituent Report
Public Reports

Preview

Cancel Add

Click Add Component to select Chart Type



Add Component

Report

Constituent Report

Display As

Y-Axis
Mailing State/Province

X-Axis
Record Count

Preview

Constituent Report

Record Count

Mailing State/Province	Record Count
MA	75
NY	66
CT	51
NH	9
CA	1

View Report

Cancel Add

- Click Save
- Repeat the process to add multiple components to a single dashboard

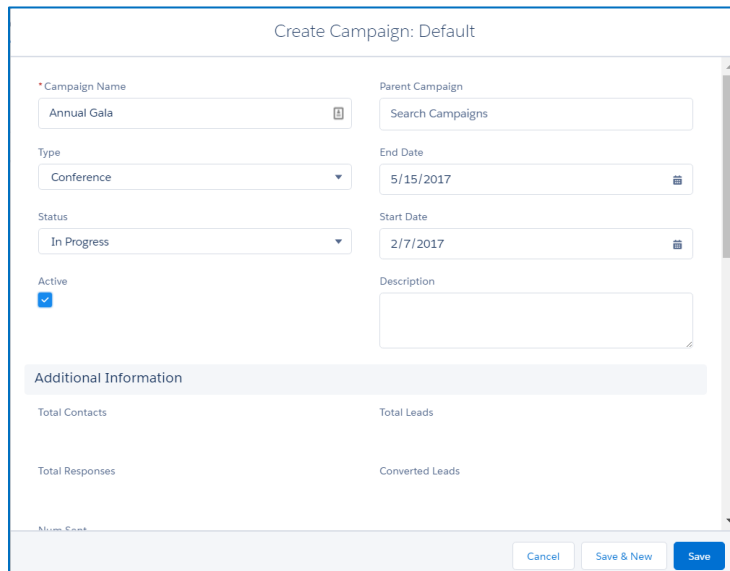
CAMPAIGNS

Campaigns can be used for many different purposes, but on the whole they come in two kinds: Attendance Campaigns, which keep track of people who are coming to an event, seminar, etc. Fundraising Campaigns, which keep track of money that people are devoting to a specific purpose

Attendance Campaigns

Imagine you are holding your Annual Gala. You want an easy way to track how many people you are inviting and how many respond to the invitation.

- Click Campaigns >> New (or New Campaign under the down arrow next to “Campaigns”)
- Click Default
- Complete the following field:
 - Campaign Name = Annual Gala
 - Status = In Progress
 - Start Date = Today
 - End Date = May 15
 - Click the Active box
 - Click Save



Adding Attendees (Campaign Members)

To add members to a campaign, start from the Contact object (not a particular Contact) and create a List View. A List View is a simple report

- The default List View is called “Recently Viewed”
- You can click the down arrow to see other default List Views



Nonprofit Success P... Home Organizations Contacts Donations Campaigns Reports

CONTACTS Recently Viewed

4 items • Last updated 02/09/2017 at 07:23

	NAME	ORGANIZATI...	HOME PHONE	MOBILE	PHONE	EMAIL	MAILING STR...	MAILING CITY	MAILING STA...	MAILING ZIP...
1	<input type="checkbox"/>	Karye West	West and Kar...	(333) 333-33...		(333) 333-33...	karye@west...	123 Main Str...	Malden	MA 02148
2	<input type="checkbox"/>	Paul McCartn...	McCartney H...							
3	<input type="checkbox"/>	BBB Gates	Gates Househ...							
4	<input type="checkbox"/>	Kim KandashL...	West and Kar...					123 Main Str...	Malden	MA 02148

To create a List View for “Contacts in MA”

- Click on the List View Controls Icon (not the main Setup Icon)
- Click New
- Create a name for your List View
- Indicate if the List View will be visible to you or to all users
- Click Save

New List View

* List Name

Contacts in MA

Who sees this list view?

☐ Only I can see this list view

☒ All users can see this list view ⓘ

Cancel Save

- Click the Filter button (a funnel)
- Click Add Filter

New Import Add to Campaign

⚙️ ↺ ✎️ 📊 🔍

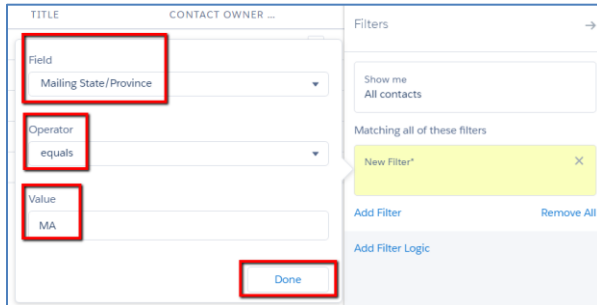
Filters →

Show me All contacts

Add Filter Remove All

- Create the filter:
 - Field = Mailing State/Province

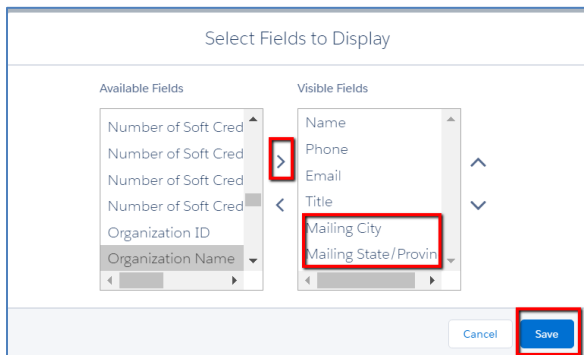
- Operator = Equals
- Value = MA
- Click Done



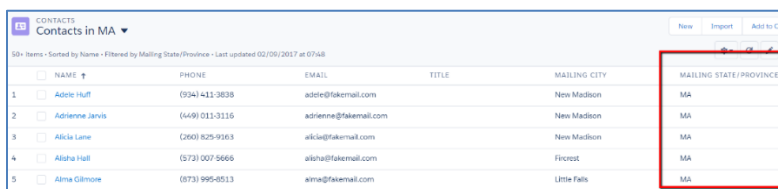
- Click Save

Now adjust the List View to show Mailing City and Mailing State/Province

- Click List View Controls
- Click Select Fields to Display
- Use the left/right arrows to move fields from the “Available Fields” column to “Visible Fields”
- Click Save

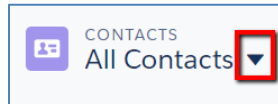


- Now you can see that this List View only contains Contacts from Massachusetts



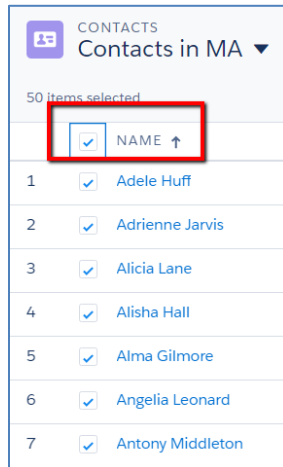
NAME	PHONE	EMAIL	TITLE	MAILING CITY	MAILING STATE/PROVINCE
Adelle Huff	(934) 413-3838	adelle@fakemail.com		New Madison	MA
Adrienne Jarvis	(449) 013-3116	adrienne@fakemail.com		New Madison	MA
Alicia Lane	(260) 825-9163	alicia@fakemail.com		New Madison	MA
Alisha Hall	(572) 007-5666	alisha@fakemail.com		Fineport	MA
Alma Gilmore	(873) 995-0513	alma@fakemail.com		Little Falls	MA

- The other Contacts are not deleted, but simply hidden, as you can see by changing the List View to All Contacts

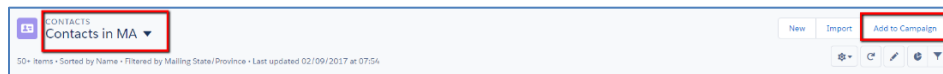


Using a List View to Add Contacts to a Campaign

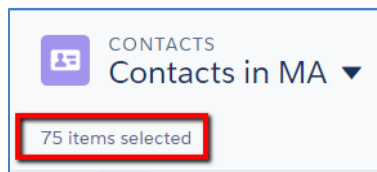
- From the “Contacts in MA” List View, select the contacts to join the Campaign
- To select all the Contacts, click the top box; otherwise click one at a time



- Click Add to Campaign



You should be adding about 75 Contacts if all the MA residents are selected




- Select Annual Gala
- Click Submit

Add to Campaign

75 Contacts Selected

* Campaign

Search Campaigns

 Annual Gala
2/7/2017

+ New Campaigns

Existing campaign member

☒ Keep existing Member Status

☐ Update to the selected Member Status

Cancel Submit

To confirm that you had added the Campaign Members

- Click Campaigns
- Next to the Campaign Name Annual Gala, it says Total Contacts = 75

Nonprofit Success P... Home Organizations Contacts Donations Campaigns Reports							
CAMPAIGNS Recently Viewed							
1 item • Last updated 02/09/2017 at 08:04							
CAMPAIGN N...	STATUS	START DATE	END DATE	TYPE	TOTAL CONTA...	TOTAL LEADS	
1 Annual Gala	In Progress	2/7/2017	5/15/2017	Conference	75	0	

Parent and Child Campaigns

You may want to create multiple campaigns that all have something in common. For example, the Annual Gala might be only one of several events you are holding in 2017. We will therefore create a “Parent Campaign” called “Events 2017” and place “Annual Gala” under it, along with a new Campaign called “Spring Fling”

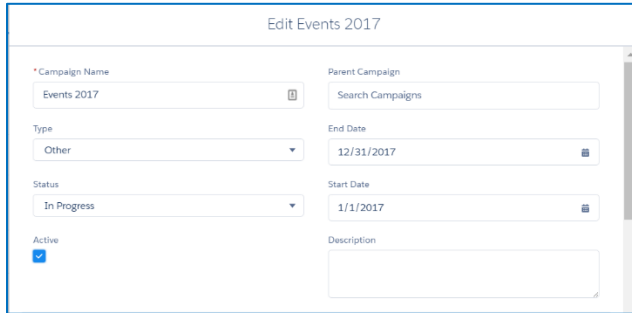
- Campaigns >> New >> Default

Campaigns Reports

New

Settings List Refresh Edit Add Filter

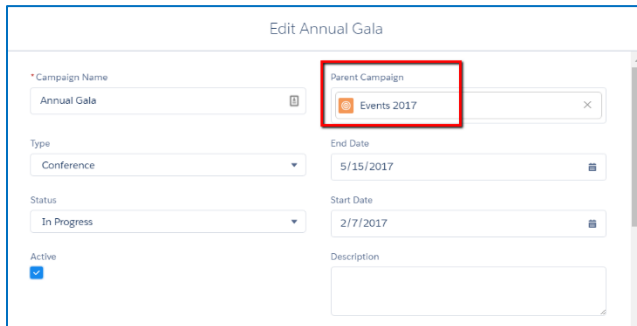
- Call the Campaign “Events 2017”
- Make the Campaign Active
- Start Date = 1/1/2017
- End Date = 12/31/2017
- Type = Other
- Status = In Progress
- Click Save



Now open Annual Gala to add it under Events 2017

Click Edit

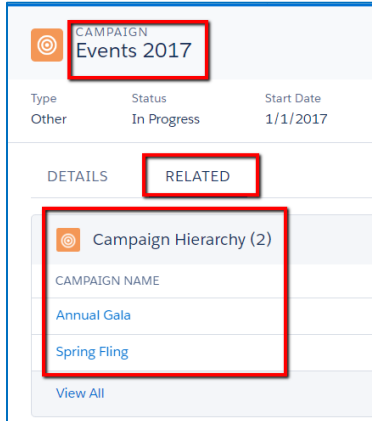
Under Parent Campaign, use the lookup to select Events 2017 (no not type in)



- Now create a new campaign called “Spring Fling”
- Make it active and attach it to Events 2017 as the Parent Campaign

Campaign Hierarchy

- To see the relationship between various Parent and Child campaigns,
- Open the record for Events 2017
- Click on the Related Lists page
- Under Campaign Hierarchy you will see the two Child Campaigns



Using Campaigns to Track Donations

Your organization may want to give donors the opportunity to direct their donations to specific purposes. For example, Paul McCartney wants to sponsor the Spring Fling by donating \$5000. Campaigns can be used to identify such directed donations

Create a donation for \$5000

- Click Opportunities (Donations) >> New
- Select Major Gift
- Complete the following fields:
 - Opportunity Name =McCartney Sponsorship 2/2/2017
 - Account Name (lookup) = McCartney Household
 - Close Date = Today
 - Stage =Posted (“Posted” = money in hand)
 - Amount = 5000
 - Primary Contact (lookup) = Paul McCartney
- **Do Not Press Save Yet!**
- After completing the Donation record, use the lookup to indicate Spring Fling under Primary Campaign
- Click Save

Create Donation: Major Gift

Donation Information

* Donation Name
McCartney Sponsorship 2/2/2017

Primary Campaign Source
Spring Fling

* Organization Name
McCartney Household

* Stage
Posted

Primary Contact
Paul McCartney

Probability (%)

Amount
\$5,000.00

Type
--None--

* Close Date
2/2/2017

Acknowledgment Status
--None--

Acknowledgment Date

Description

Cancel Save & New Save

- Go over to the Campaigns object and open Spring Fling
- Total Value Won Donations equals \$5000

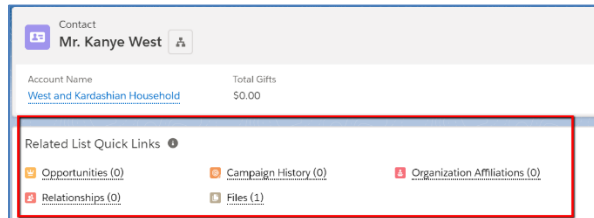
CAMPAIGN Spring Fling					
Type	Status	Start Date	End Date	Total Value Won Donations	Num Won Donations
Conference	Planned			\$5,000	1

CUSTOMIZING SALESFORCE (FOR SYSTEM ADMINISTRATORS)

Note: only the System Administrator should customize Salesforce since it may affect all Users

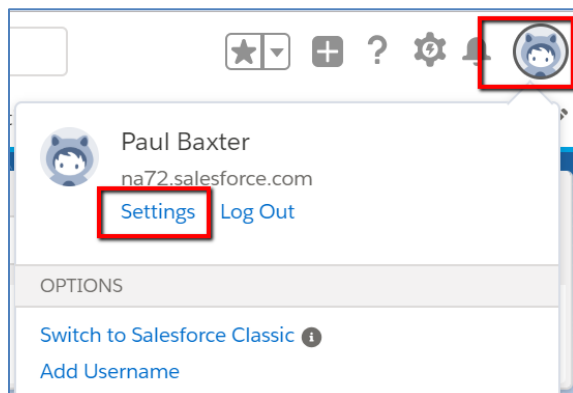
Related List Quick Links

Quick Links appear at the top of an Object to give easier access to the Related links.

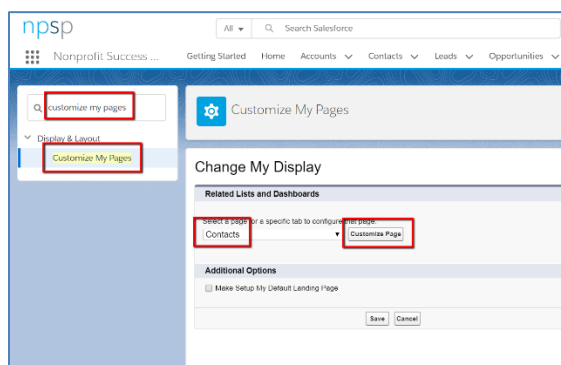


You can specify which Related links you want to have appear:

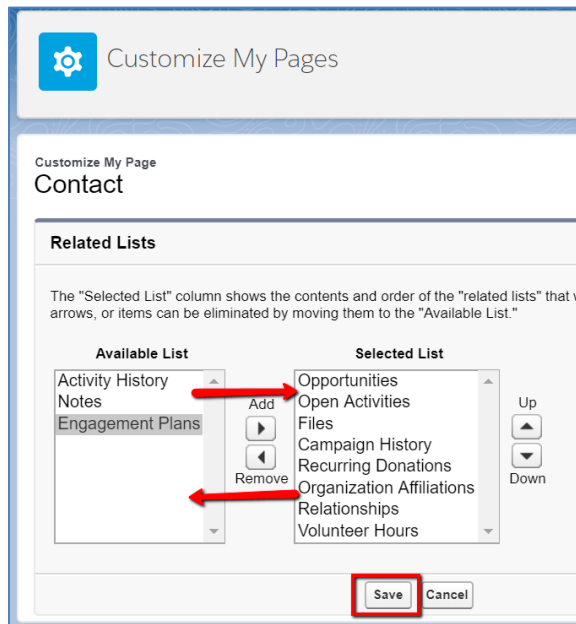
- Click on the little boy icon
- Select Settings



- Use the Quick Look to move to Customize My Pages



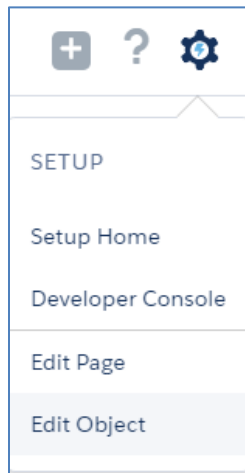
- Use the Add and Remove buttons to move Related links between the Available and the Selected columns



Creating Custom Fields

To create a Custom Field, start from a record on that object.

- To create the custom field “Native Language” on the Contact object, start from Kanye West’s (or any other Contact’s) record.
- Click the Setup icon to open the menu
- Click Edit Object
- Click Contacts



- Under Fields & Relationships click New

Fields & Relationships (122)

New
Field Dependencies
Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
-------------	------------	-----------	-------------------	---------

Creating a Field takes Four Main Steps:

Step 1. Select Field Type

- For this field, we will choose “Picklist”
- Click “Next” (in the lower right corner of the page)

☐ Date/Time
☐ Email
☐ Geolocation
☐ Number
☐ Percent
☐ Phone
☒ Picklist
☐ Picklist (Multi-Select)
☐ Text
☐ Text Area

Step 2. Give the Field a Name

- Field Label = Native Language
- Enter Picklist Values:

English
Haitian Creole
Mandarin
Portuguese
Spanish
- Click “Next”

Field Label
Native Language

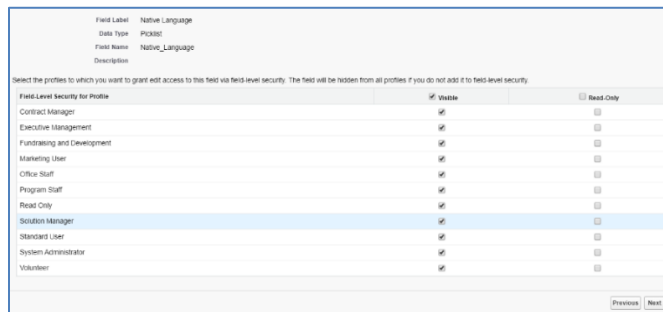
Values
☐ Use global picklist value set
☒ Enter values, with each value separated by a new line.

English
Haitian Creole
Mandarin
Portuguese
Spanish

☐ Sort values alphabetically, not in the order entered. Values will be d
☐ Use first value as default value
☒ Restrict picklist to the values defined in the value set.

Step 3. Specify Who can See the Field

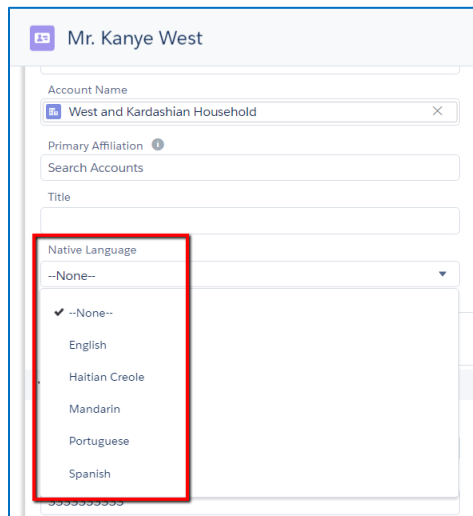
- Select the proper field-level security, which specifies which User Profile can see or edit the new field (“Visible” vs. “Read-Only”)
- Keep the default of Visible to every Profile
- Click “Next”



Step 4: Specify Where the Field Appears

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

Go to Kanye West’s record (or any other Contact) and see the new field:

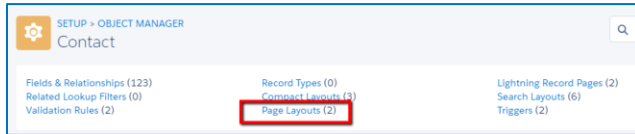


Edit Page Layouts

Move “Native Language” to a different location on the page

- Click on the Contacts tab and open up a record (Kanye West)
- Click the Setup Icon

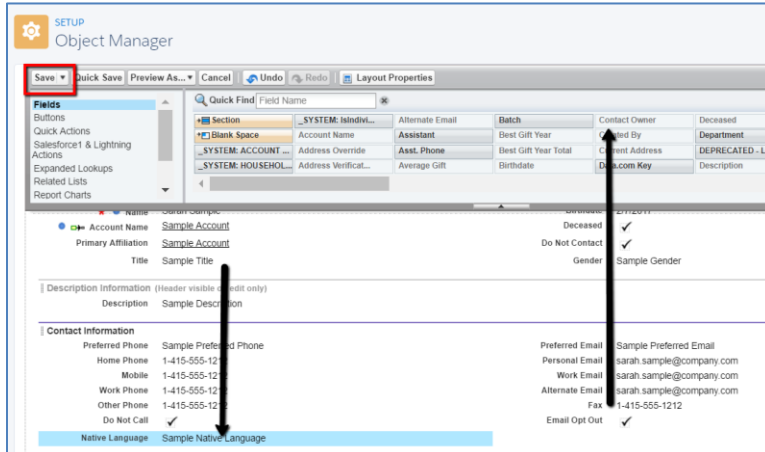
- Click Object Manager
- Select Contacts
- Click Page Layouts



- Click Contact Lightning Layout

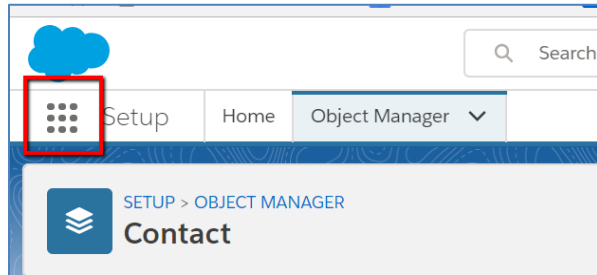
Page Layouts (2)	
PAGE LAYOUT NAME	CREATED BY
Contact Lightning Layout	Paul Baxter, 2/1/2017, 3:05 PM
Contact Layout	Paul Baxter, 2/1/2017, 3:05 PM

- Use Drag and Drop to move Native Language down into the Section called Contact Information
- Use Drag and Drop to remove the Fax field (drag it to the “Field Box”)
- Click Save (in the upper left hand corner of the Field Box)

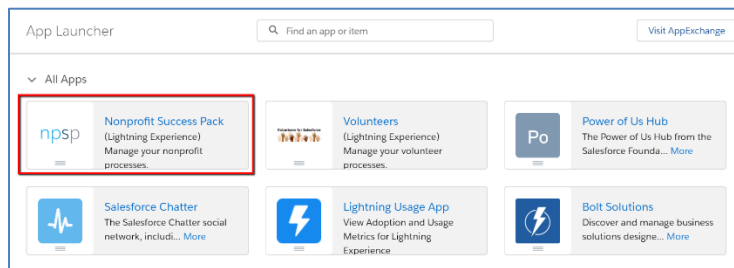


Return to “NPSP” App

- Click the App Launcher in the upper right hand corner

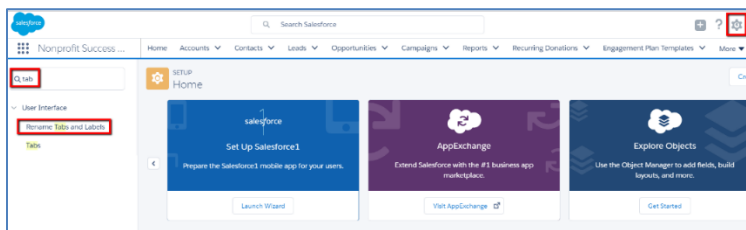


- Select the NPSP App



Rename “Account” and “Opportunity” Tabs

- Click on the Setup Icon
- Click Setup Home
- In the Setup Search Bar type “tab”
- Click “Rename Tabs and Labels”



- Click “Edit” next to “Accounts”

Rename Tabs and Labels

Make salesforce.com match your organization's terminology by renaming tab and field labels. After renaming any tab or field label, remember to update all custom reports and filters.

Select Language: English

Standard Tabs

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

- Rename “Account” to “Organization”
- Rename “Accounts” to “Organizations”
- Click Next
- 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

Tab: Accounts
Language: English

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

[Other Labels](#)

The tabs are renamed:


salesforce

Nonprofit Success ... [Home](#) [Organizations](#) [Contacts](#) [Leads](#) [Donations](#) [Campaigns](#)

Adding or Removing Tabs From an App

To see the Apps, click on the checkerboard in the upper left corner of the Salesforce page.

salesforce

 Nonprofit Success ...

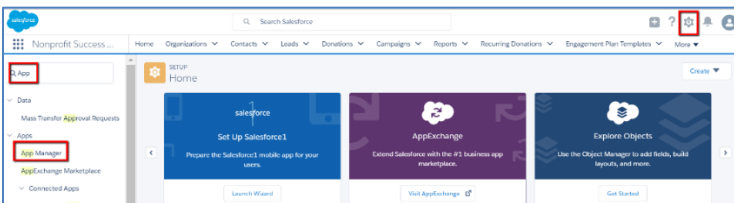
An App is a collection of tabs, generally connected to a particular job description or set of responsibilities. The NPSP comes with the following Apps:

- Call Center
- Marketing
- Salesforce Chatter
- Nonprofit Success Pack (default)
- Power of Us Hub
- Volunteers
- Sales

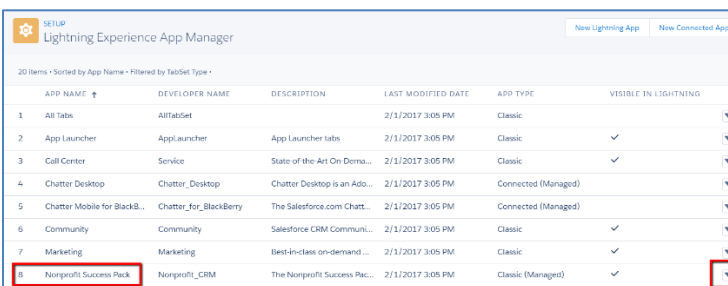
You can edit any of these apps or create a new app. Only the System Administrator should do this, however, because these changes can affect everybody's Salesforce account.

To Change the Tabs Visible on an App

- Click the Setup Icon
- Click Setup Home
- In the Setup Search Bar, type App
- Click App Manager



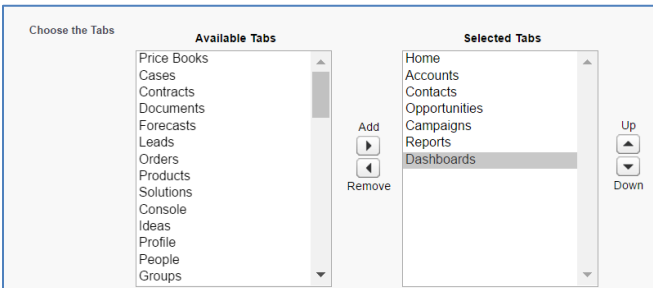
- Find the Nonprofit Success Pack app, then click on the down arrow
- Click Edit



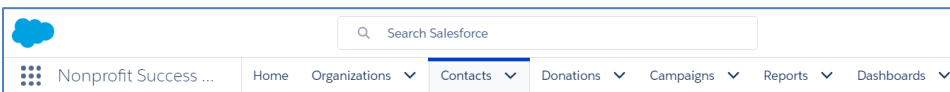
APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED DATE	APP TYPE	VISIBLE IN LIGHTNING
1 All Tabs	AllTabSet		2/1/2017 3:05 PM	Classic	▼
2 App Launcher	AppLauncher	App Launcher tabs	2/1/2017 3:05 PM	Classic	▼
3 Call Center	Service	State-of-the-Art On Dema...	2/1/2017 3:05 PM	Classic	▼
4 Chatter Desktop	Chatter_Desktop	Chatter Desktop is an Ado...	2/1/2017 3:05 PM	Connected (Managed)	▼
5 Chatter Mobile for BlackB...	Chatter_for_BlackBerry	The Salesforce.com Chatt...	2/1/2017 3:05 PM	Connected (Managed)	▼
6 Community	Community	Salesforce CRM Commun...	2/1/2017 3:05 PM	Classic	▼
7 Marketing	Marketing	Best-in-class on-demand ...	2/1/2017 3:05 PM	Classic	▼
8 Nonprofit Success Pack	Nonprofit_CRM	The Nonprofit Success Pac...	2/1/2017 3:05 PM	Classic (Managed)	▼

- Remove tabs by selecting them and clicking the Remove button
- Leave only the following tabs:
 - Home
 - Accounts
 - Contacts
 - Opportunities

- Campaigns
- Reports
- Dashboards
- Make Home the Default Landing Page

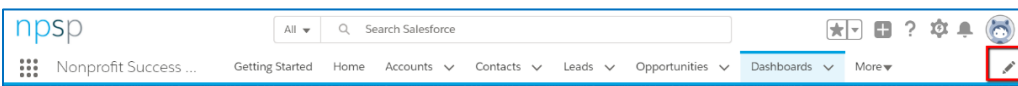


- Click Save
- Click on the App Launcher (checkerboard) to re-launch the Nonprofit Success Pack app.
- Now only 7 tabs are visible

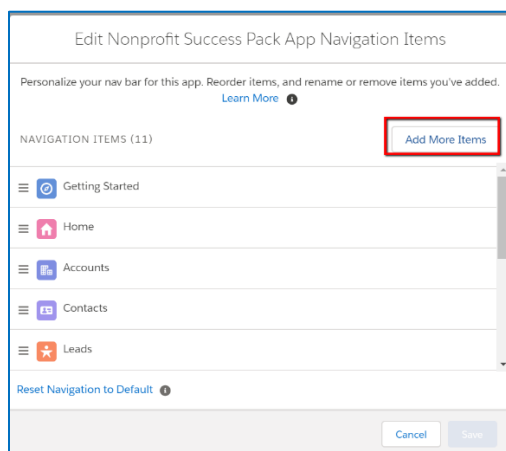


Quick Way to Add/Remove Objects to Nav Bar:

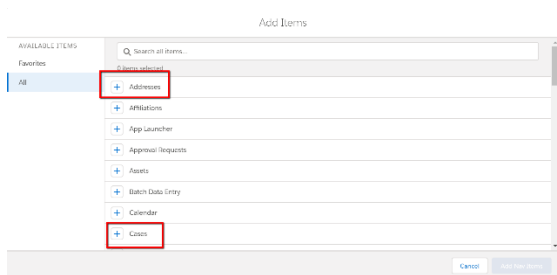
- Click Pencil icon to right of Nav Bar



- Click Add New Items



- Click Plus Sign (+) on desired Object



- Click Add New Items and Save

To Remove items, go back to “Edit Nonprofit Success Pack App Navigation Items”

- Select item to delete
- Press Delete key

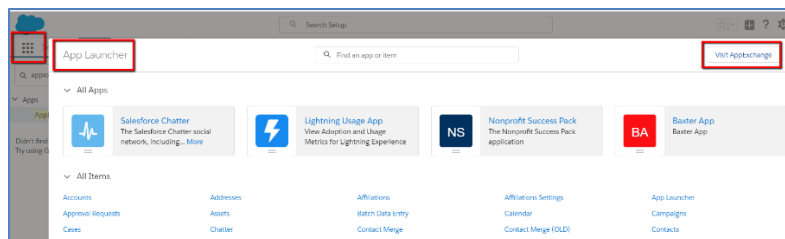
Note: you can only delete items you have added, not ones that belong to the app as created by the System Administrator (see above)

USING THE “APPEXCHANGE”

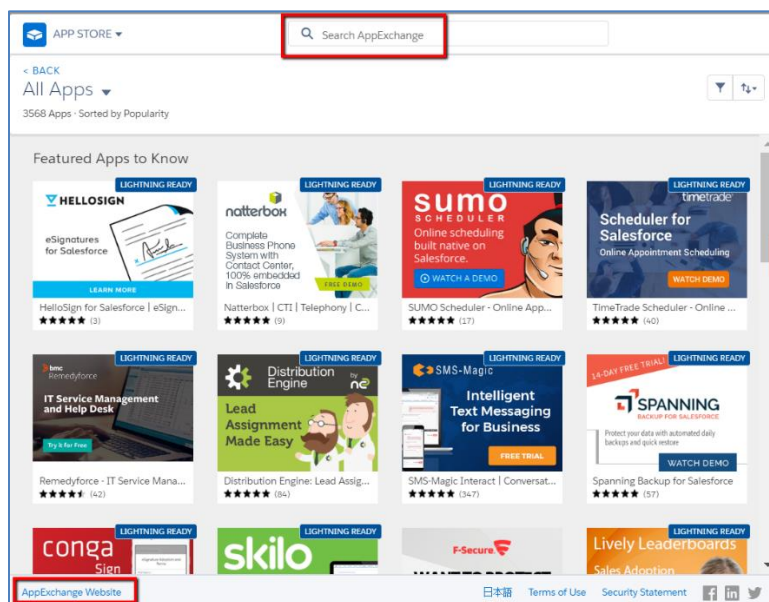
Salesforce offers a lot of flexibility, but it is not designed to do everything. For everything else, there is the AppExchange, a marketplace of applications created by third-party vendors that integrate with Salesforce for tasks like mass marketing, online donations, document generation, and creating surveys and forms to capture data into Salesforce. The apps each come with their own cost structure, so read the descriptions carefully

To get into the AppExchange,

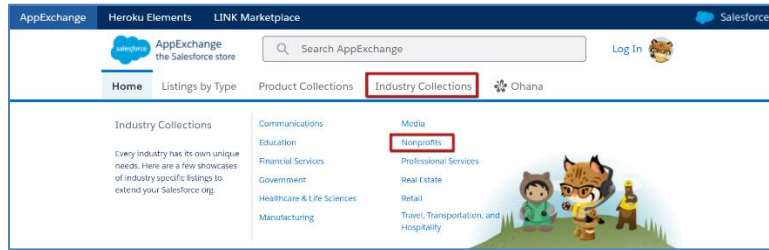
- Click the grid icon in the upper left corner of your screen to enter the App Launcher
- Click the button on the right marked “Visit AppExchange”



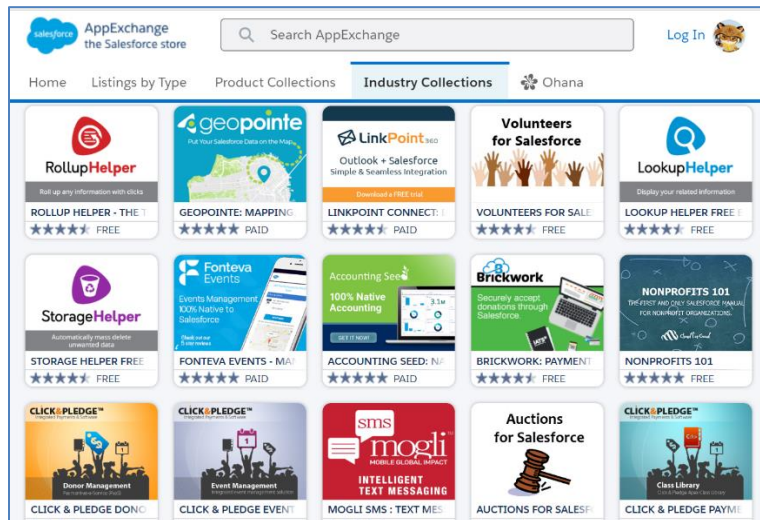
- If you are searching for a specific app, you can do it from here.
- If you are just browsing, go to the AppExchange website



- From the website you can select Industry Collections and browse apps intended for nonprofits



Some examples include these:



APPENDIX

Introduction to “Salesforcese”

ACCOUNT: an organization, company, or partner that you want to track

APP EXCHANGE: a sharing interface from salesforce.com that allows you to browse and share apps and services for the Force.com platform via the web.

APP: short for “application.” Basically, an app is a collection of tabs that address a specific organizational need.

CAMPAIGN: an events or activities to achieve development or programmatic goals

CONTACT: those individuals associated with your organization. They can be donors, volunteers, clients, students, etc.

DASHBOARD: A visual representation of your report data.

HOUSEHOLD: Households group contacts around a physical address, limiting mailings to only one piece per address, and aggregating donation information.

INSTANCE: The Salesforce that belongs to one particular organization.

LEAD: potential donors, program participants, members, etc.

OBJECT: Each Object stores a certain kind of data – Contacts, Households, etc. Objects are linked together to provide the “360-degree view” of you constituents.

OPPORTUNITIES: an opportunity is a financial transaction, such as grants, donations, product sales, or fee-for-service activities.

PROFILE: a group of settings and permissions that control what data a user can access in Salesforce.