501partners

Salesforce "Lightning" Bootcamp 101 for Nonprofits Workbook

501Partners, LLC ● 164 Canal Street, 5th Floor ● Boston, MA 02114
978. 232.9200 ● hello@501partners.com ● 501partners.com

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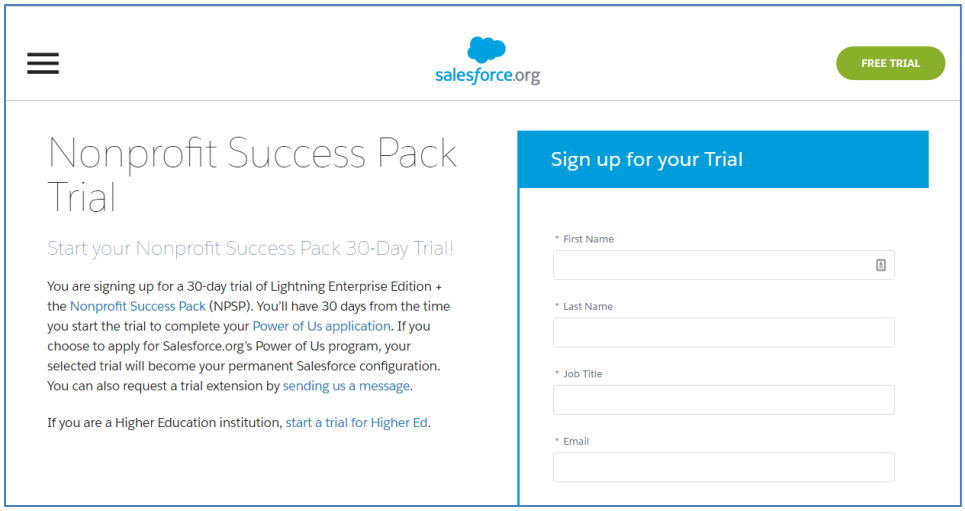
Contents

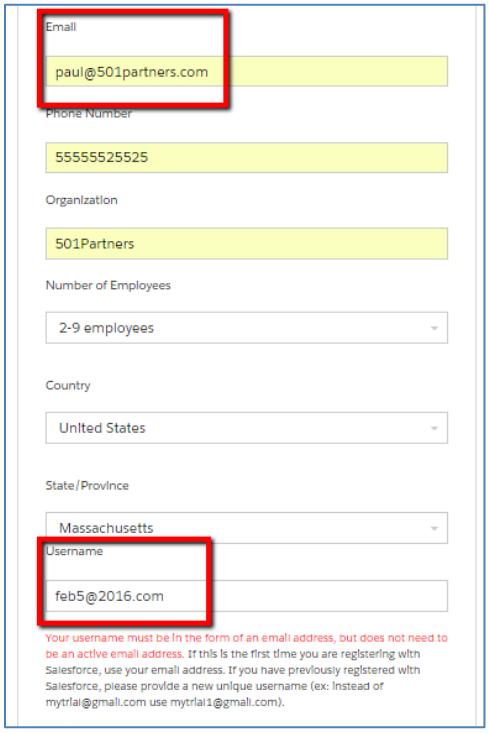
DOWNLOADING A TRIAL INSTANCE OF SALESFORCE

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:

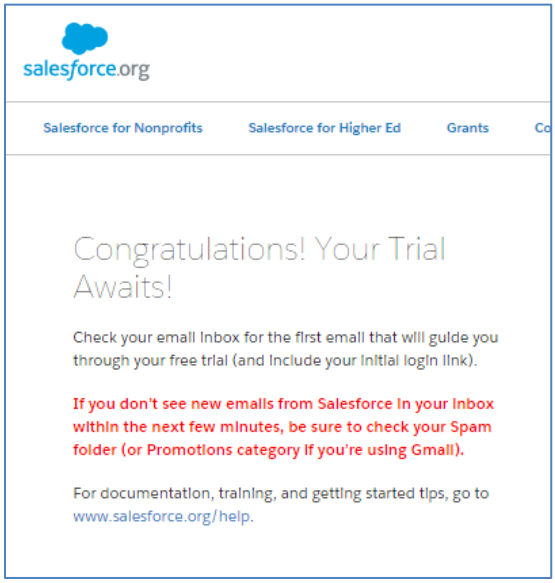
- Go to www.salesforce.org/npsp-trial and complete the form.



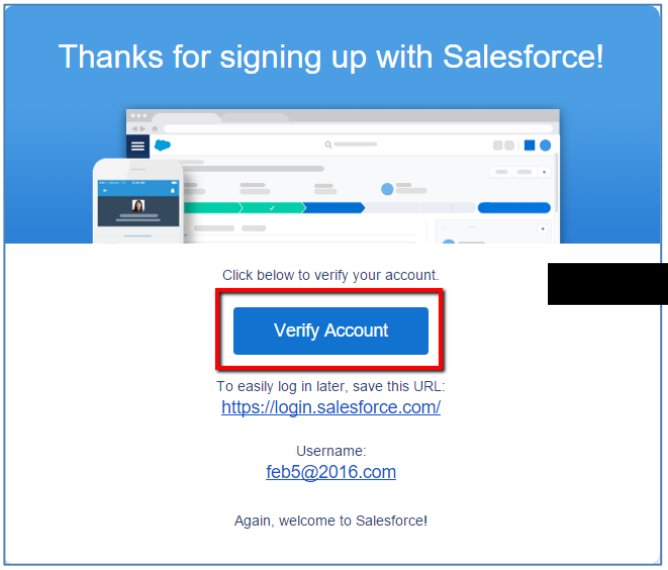
- There are two similar fields that you must complete correctly:
  - "Email"
  - "Username"
- Make sure that your "Email" is a real email that you can access. Salesforce will send you password information to this address
- "Username" needs to be in the form of an email, but because this is a trial instance 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.

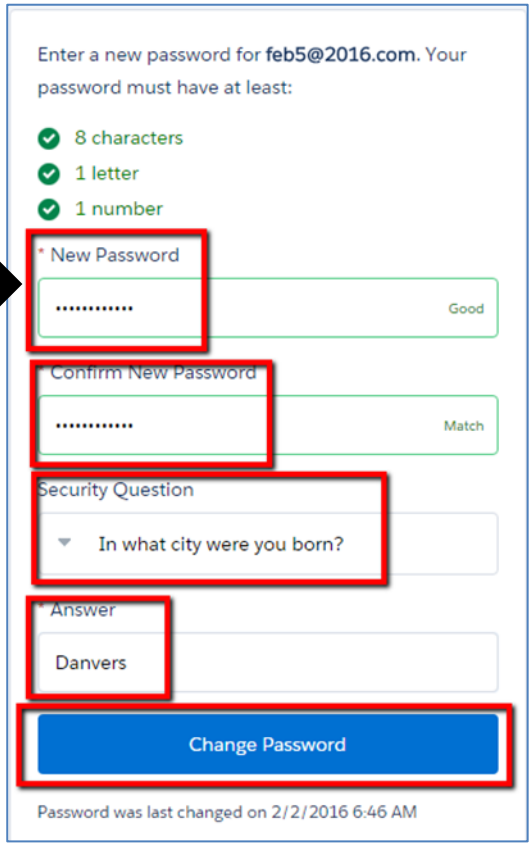


- Salesforce will confirm your new account and instruct you to check your email

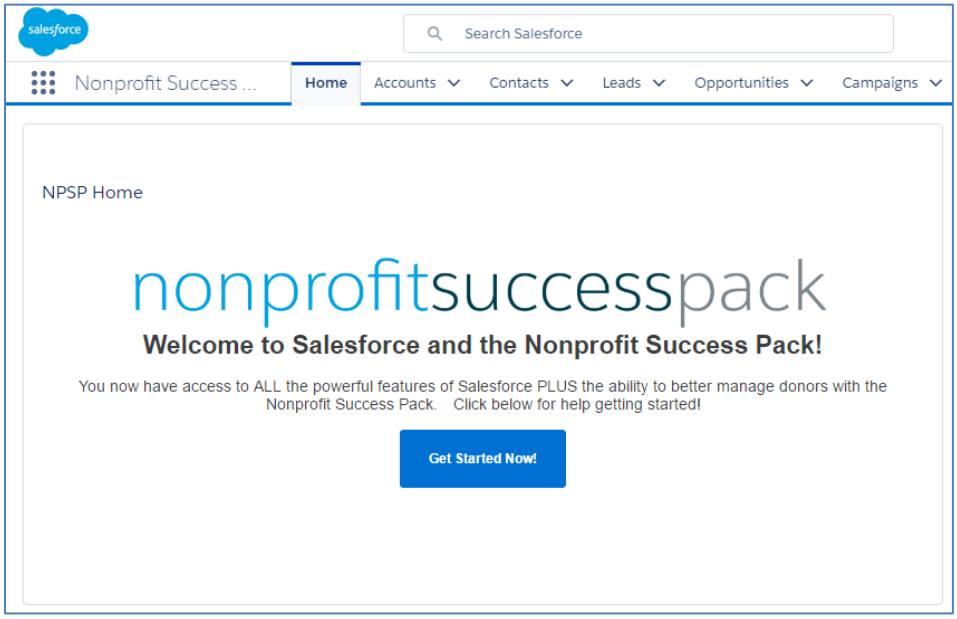


- Follow the instructions on the email to create a password for your account:





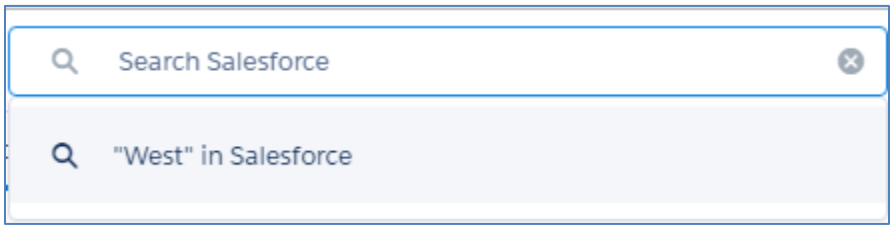
- And you are ready to use Salesforce!



CREATING CONTACTS AND HOUSEHOLDS

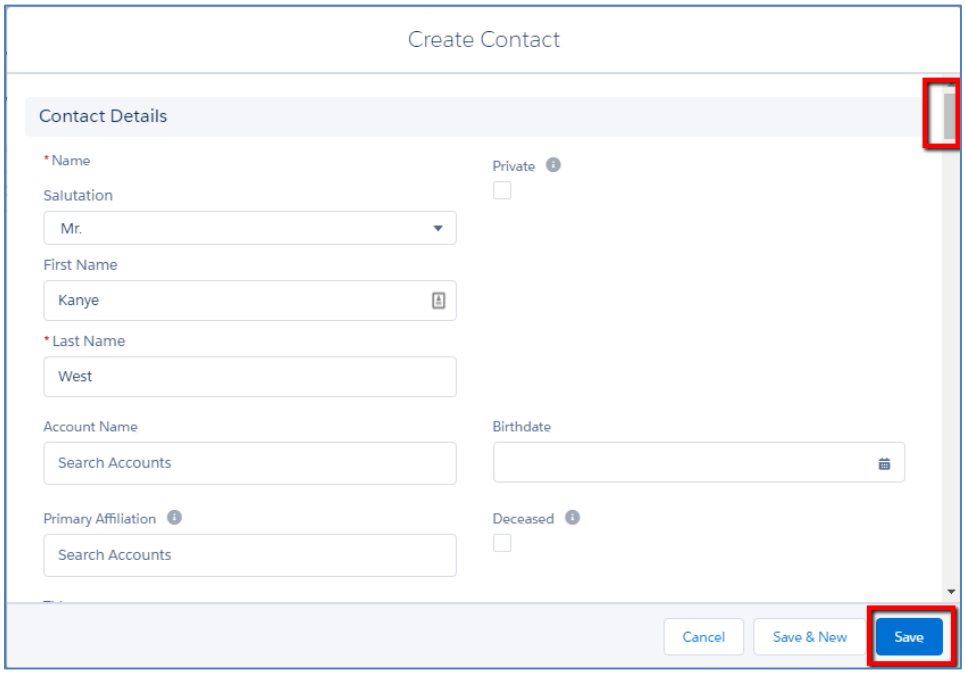
Creating a Contact Record

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

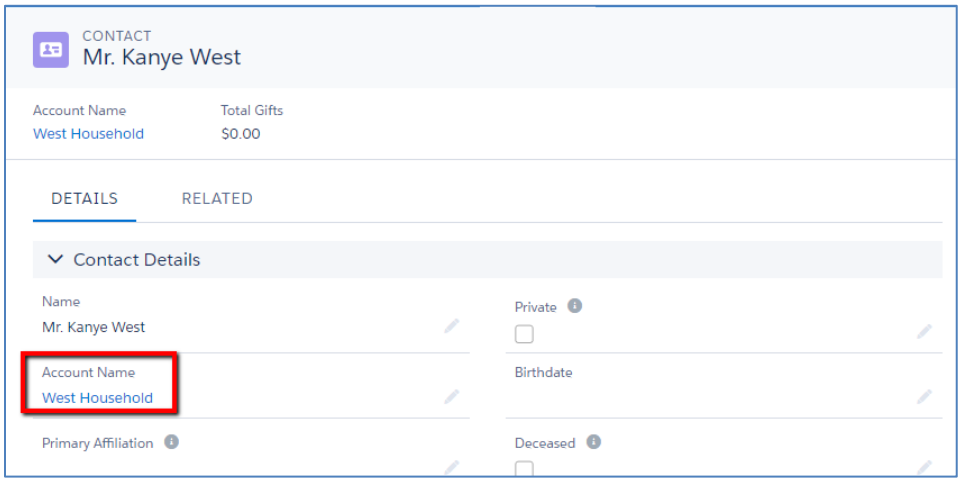


- Click the down arrow next to the Contacts tab and click "New Contact"

- 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



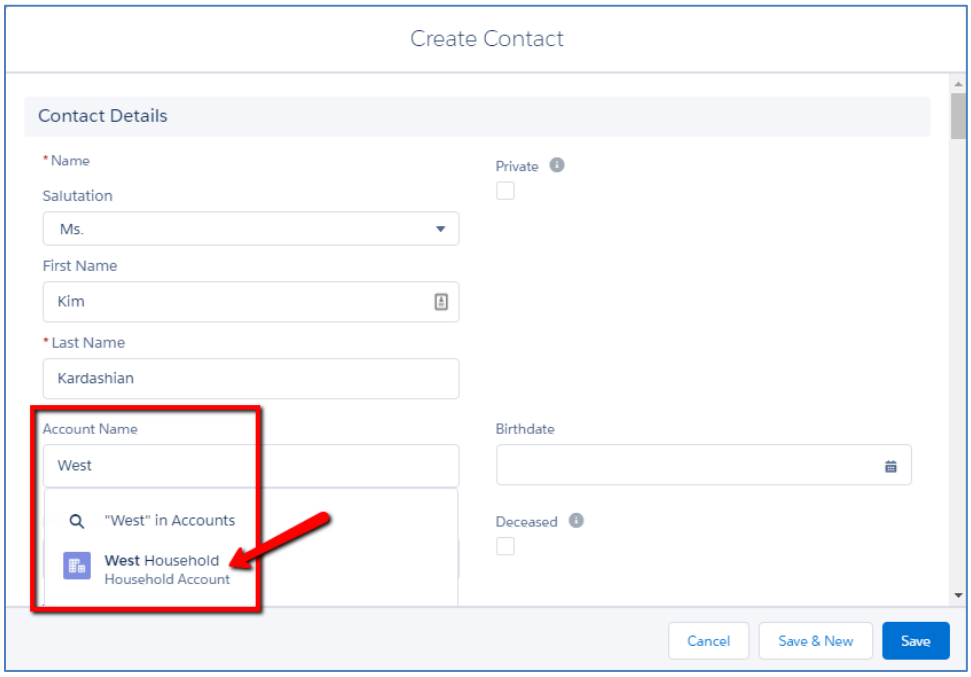
- Notice that the Account Name field was automatically filled in ("West Household")



Adding Another Person to a Household

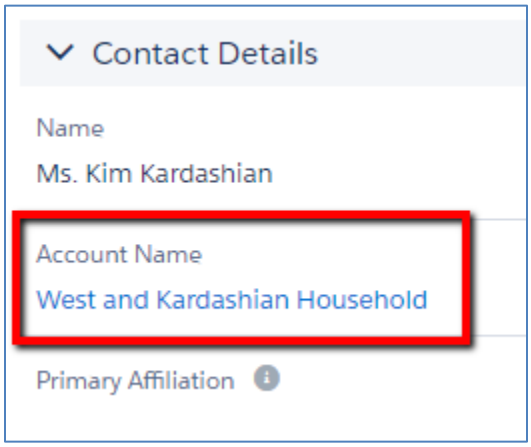
Repeat the steps above:

- 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

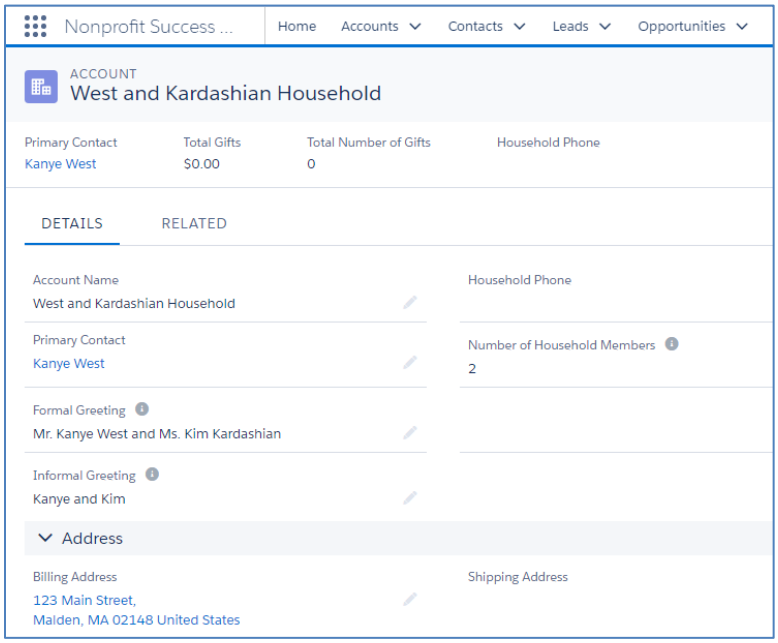


- Kim Kardashian and Kanye West are in the West and Kardashian Household

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

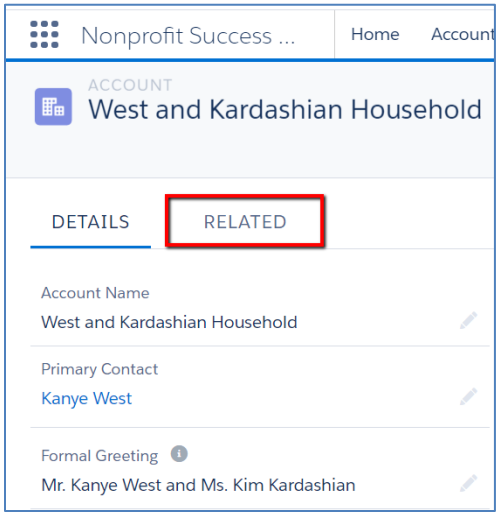


- Click on the link for the West and Kardashian Household or click on Accounts to see the Household record:

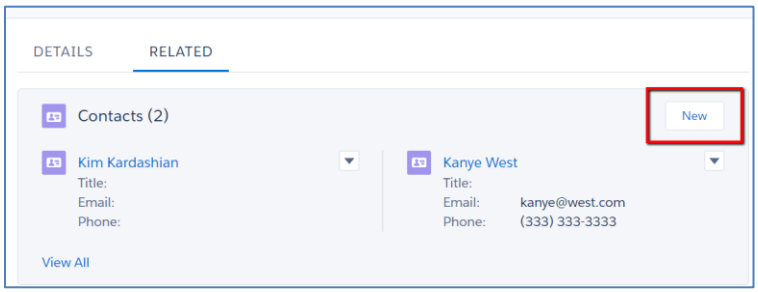


To add additional Contacts to the Household

- Click Related to move to the Related Lists page



- Click New next to Contacts



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

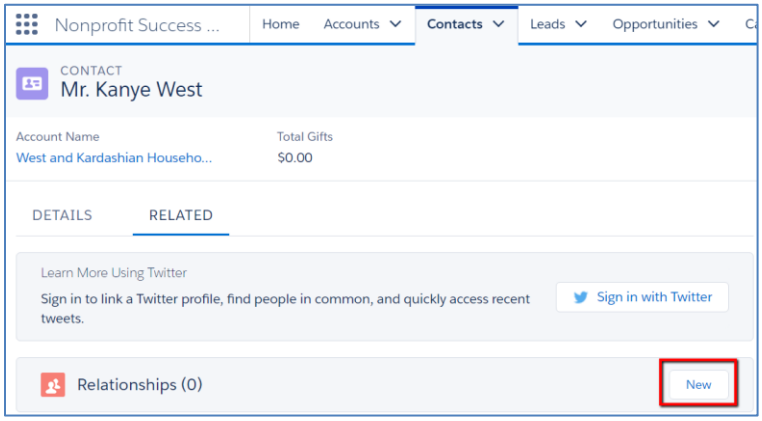
Creating a Relationship Between Two Contacts

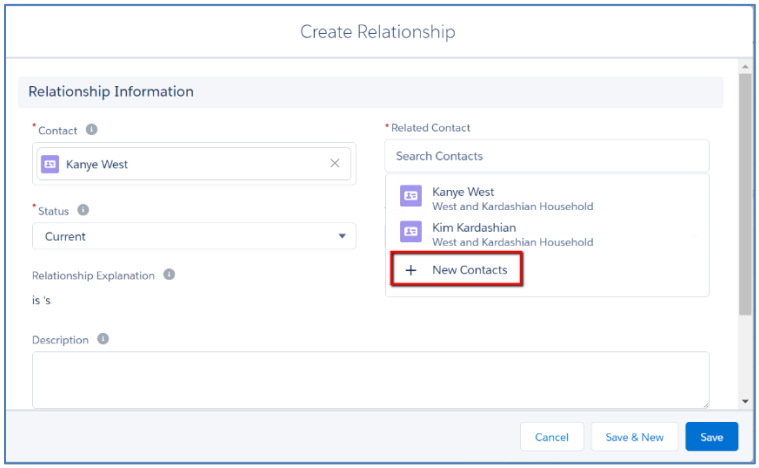
A Household indicates that two Contacts are connected by virtue of living at the same street address. If you want indicate another type of connection between Contacts, you can use the Relationship function

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

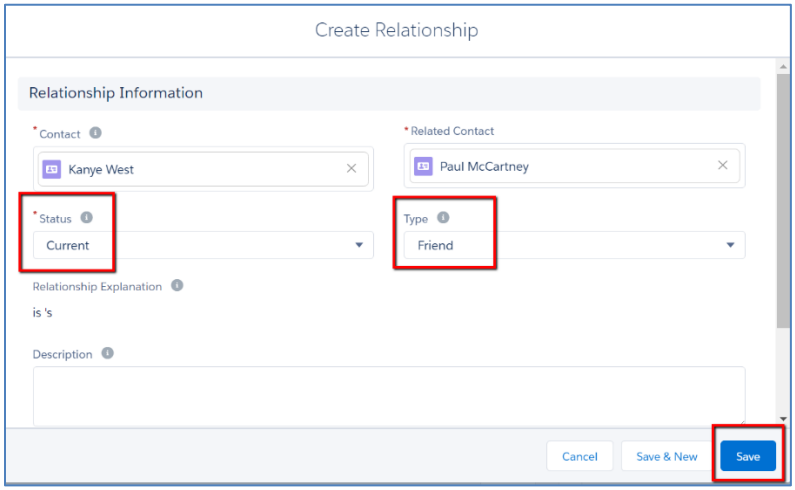
To create a relationship between Kanye West and Paul McCartney:

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





- 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



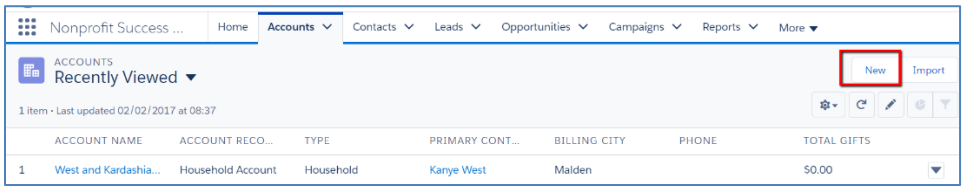
- The Relationship record now says, "Mr. Paul McCartney is Mr. Kanye West's Friend"

CREATING AN ORGANIZATION RECORD

Create Organization "Gates Foundation"

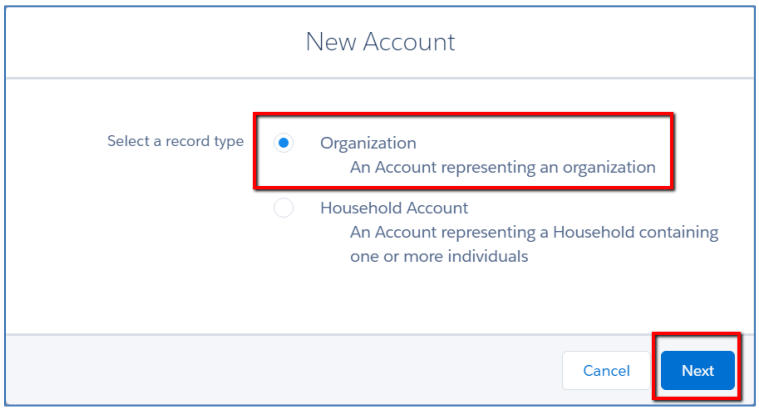
Note: Always Search first to make sure the record doesn't already exist

- 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)

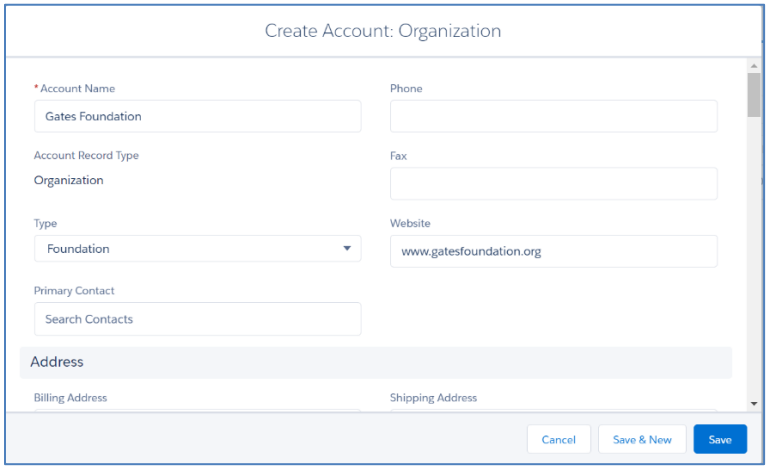


Note: the West and Kardashian Household already exists as an Account. Accounts can be <u>either</u> Households or Organizations

- Make sure that Organization is selected and click Next

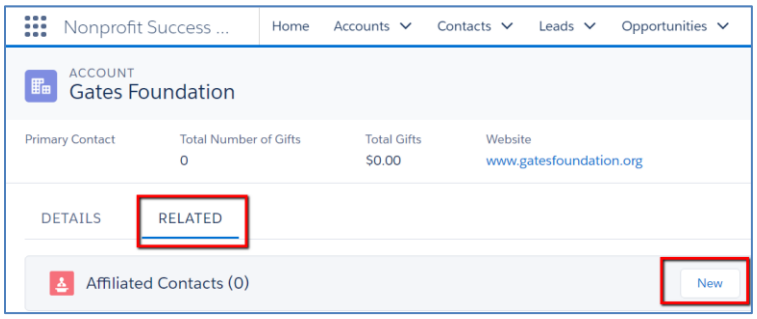


- Enter data for the Gates Foundation and click Save



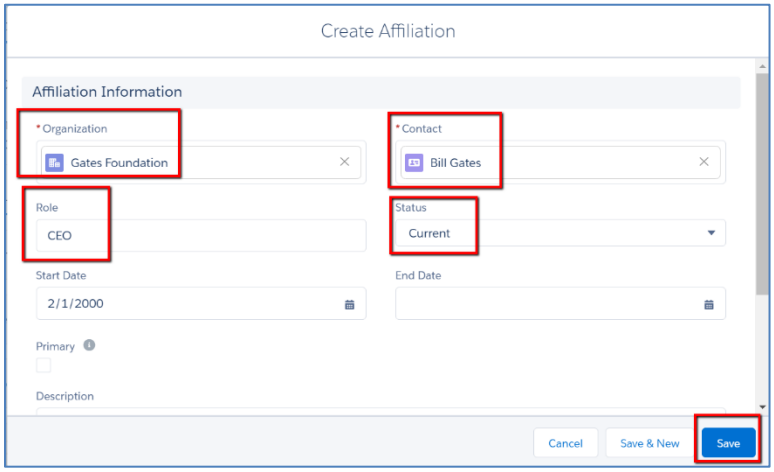
Creating an Affiliation: Account to Contact

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



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

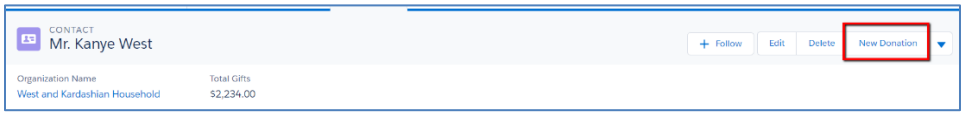


ENTERING DONATIONS AND GRANTS

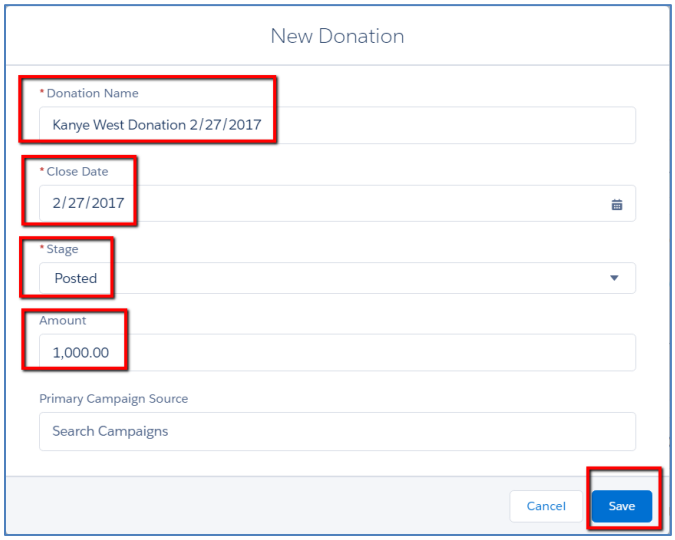
The NPSP offers several different ways to record a Donation. Typically, we recommend entering a donation that comes from an individuals from the Contact object. However if you want to indicate that it comes from a couple, you may use the Opportunity or Account objects. Finally, you should typically enter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



- 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)



- Click Save

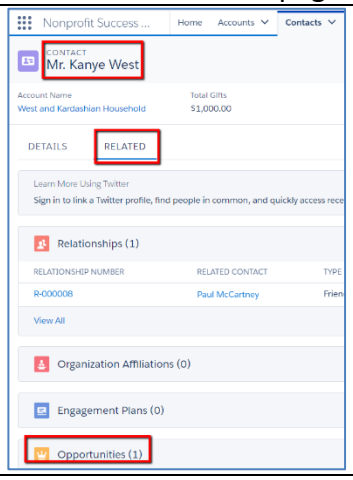
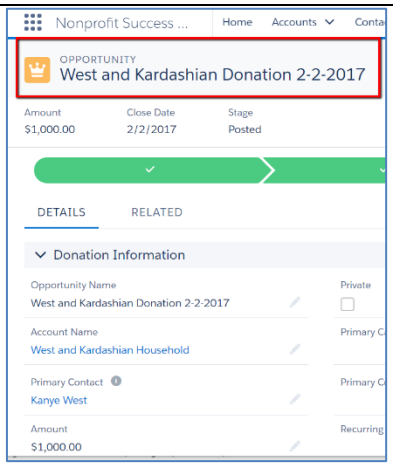
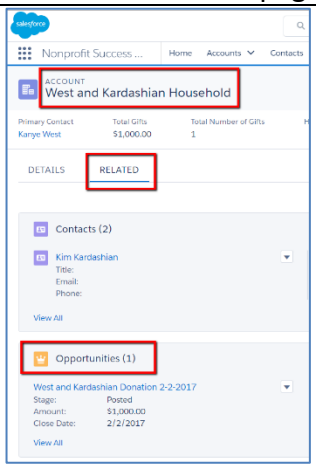
Note: Sometimes you will want to capture additional information about a Donation, for example if you wanted to indicate that the Donation was a Tribute. In this case you would need to open the Donation record on the Opportunity object and edit it further.

Where to Find Donation Information

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

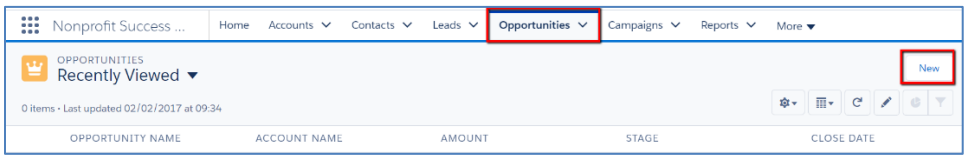
- on the Contact object
- the Opportunity object
- the Account (Household) object

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.

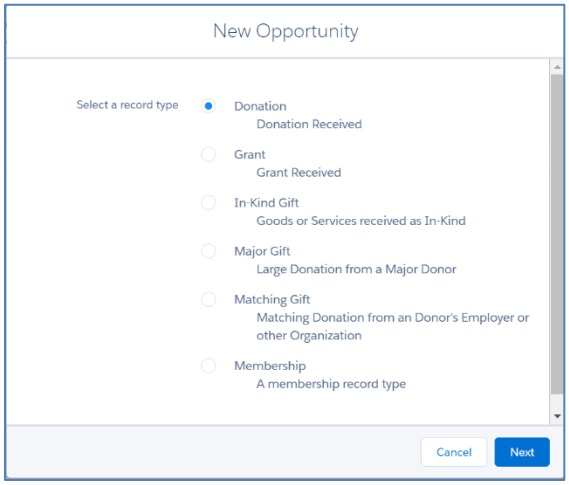
Contacts On the Related Lists page	**Opportunity**	**Account (Household)** On the Related Lists page
		

Entering a Donation from the Opportunity Object

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

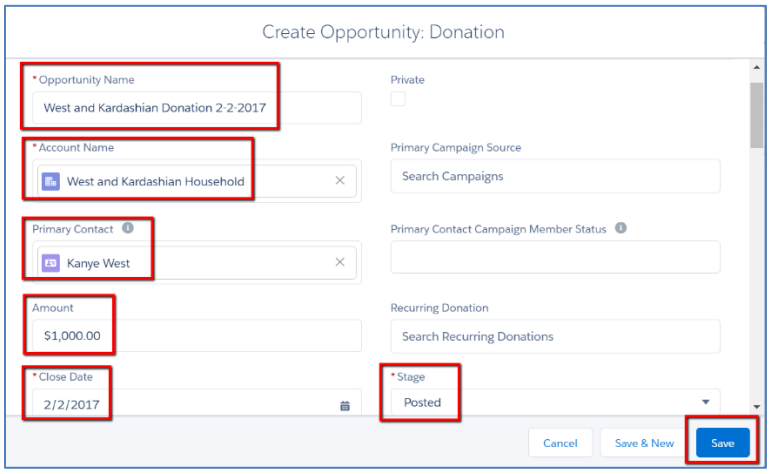


Select the Opportunity Type (Donation)



Complete the following fields:

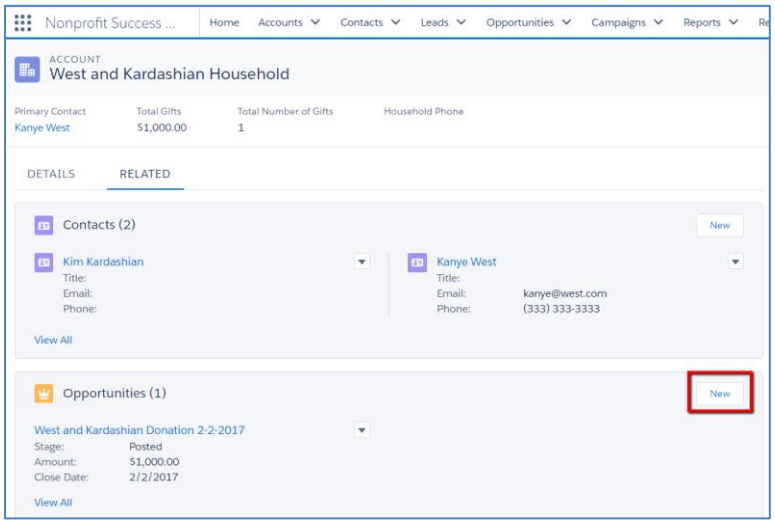
- Required:
  - Opportunity Name =West and Kardashian Donation 2/2/2017
  - Account Name = West and Kardashian Household
  - Close Date = Today
  - Stage = Posted ("Posted" = money in hand)
- Optional but Recommended
  - Amount
  - Primary Contact



- Click Save

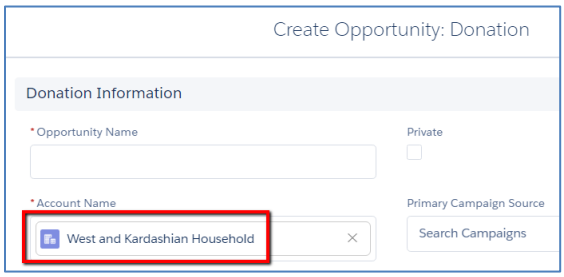
Entering a Donation from the Account Object

- 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



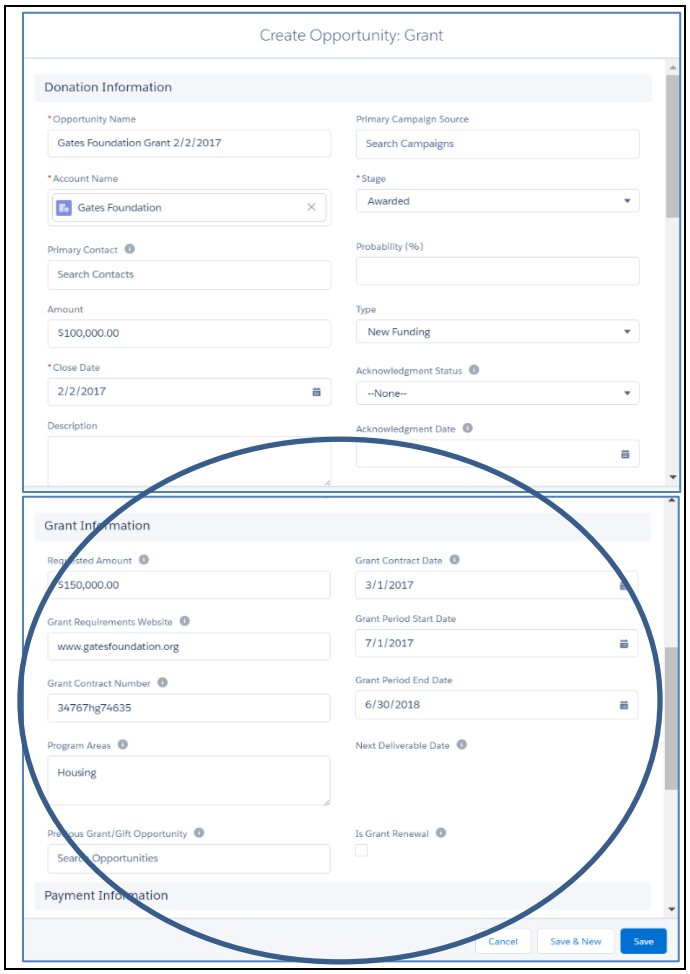
- Enter the remaining Donation information as above
- Click Save

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:

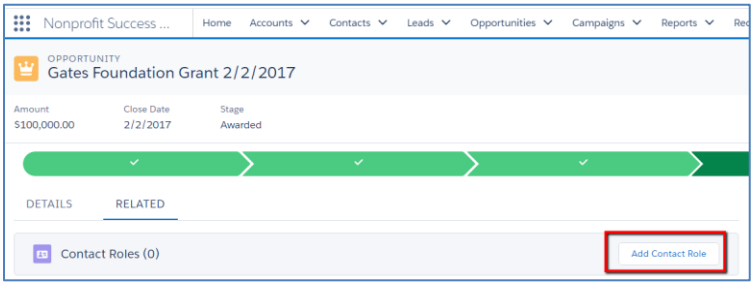


Contact Roles ("Soft Credit")

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.

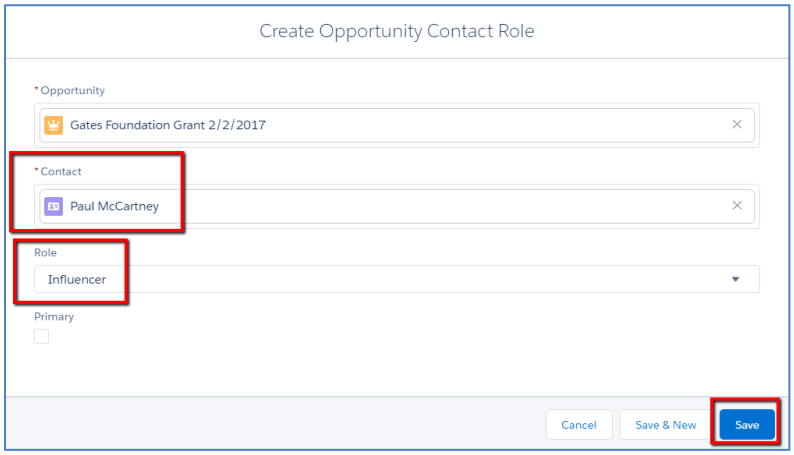
Imagine that Paul McCartney helped you get the grant from the Gates Foundation. To give him credit:

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

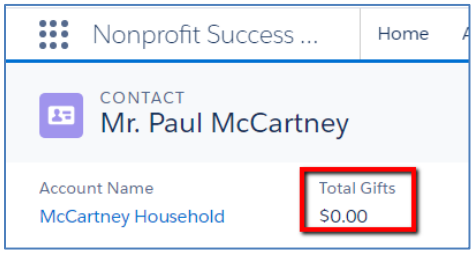


Note: the Opportunity Name populates automatically

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



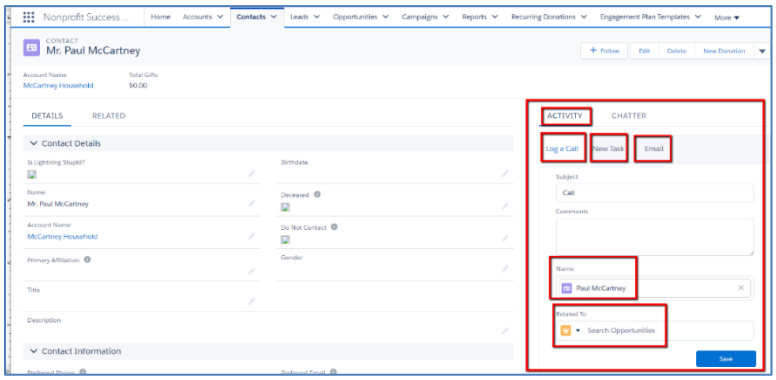
- The opportunity will be listed on Paul McCartney's Related Lists page.
- However, the amount will not show up in Total Gifts since Paul McCartney is not the actual donor.



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

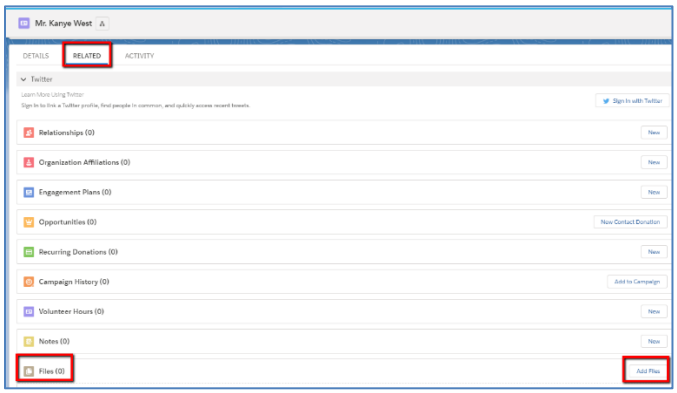


The right-hand side of the screen in any record (including Contacts, Accounts, Opportunities, etc.) is devoted to Activities. Their purpose is to make it easy to act on the data you have stored in Salesforce. With a few clicks you can

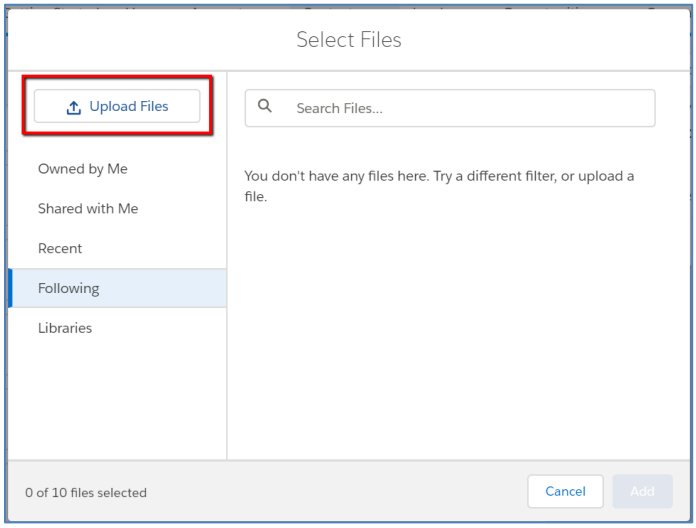
- **Log a Call**: Make notes after completing a call so your colleagues can see what you discussed
- Create a **New Task**: make a reminder for yourself or a colleague to follow up on the selected record
- **Email**: send a quick email to the person on the record

Files

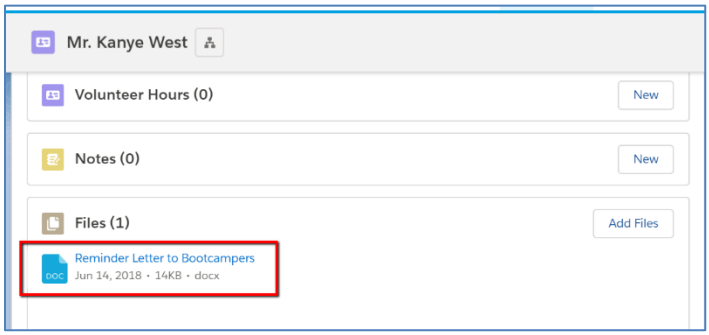
The **Files** link is on the **Related** page. This allows you to attach files to a Salesforce record in pdf, Word Excel and many other formats:



- 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.

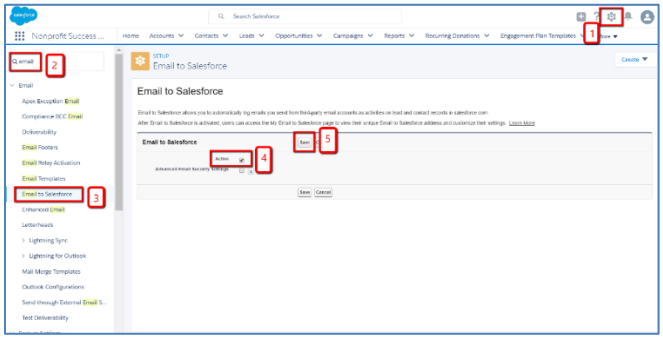


Attaching Emails to a Salesforce Record Automatically

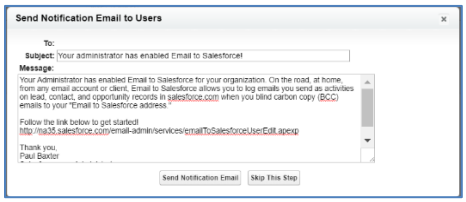
"Email to Salesforce" allows you to attach a copy to the Contact's record when you send an email, even if you don't send it from within Salesforce. Email to Salesforce has to be set up by the System Administrator first, then each User can activate it.

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

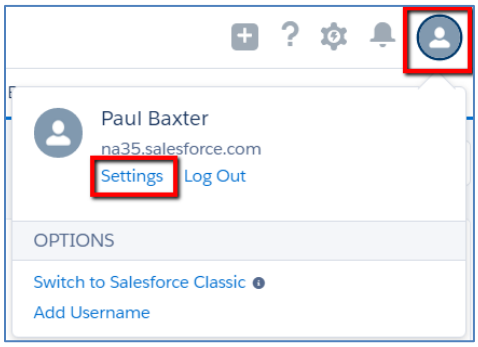


6. Salesforce will ask if you want to send the following Notification to all Users

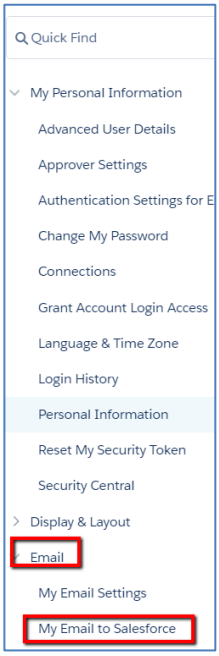


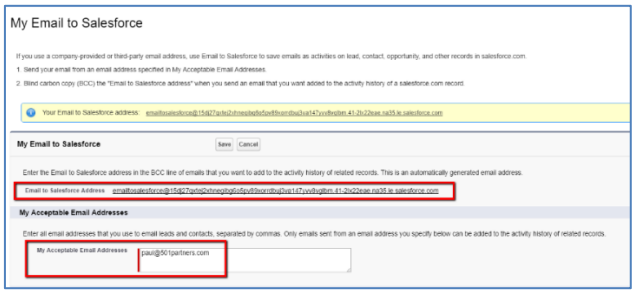
Activating Email to Salesforce for Each User

- Click the Profile icon
- Click Settings

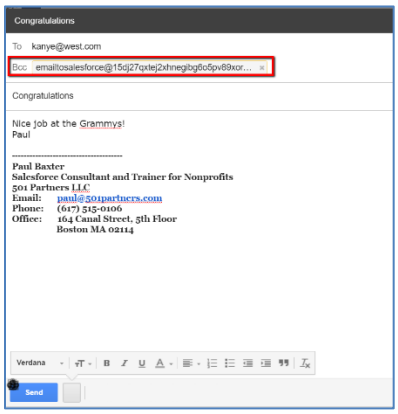


- Click Email
- Click My Email to Salesforce
- Send an email from the “Acceptable email address”
- Include the long link listed in this page in the BCC: field.





- 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



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

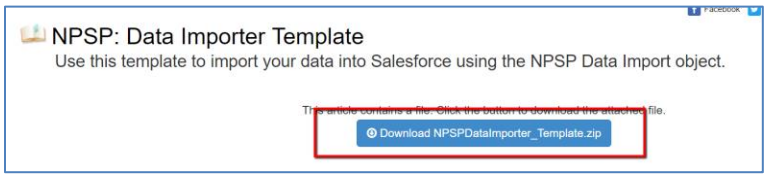
The process is somewhat different than a conventional Data Loader because the data does not initially get stored in standard objects. Instead it first goes to a custom object (the NPSP Data Import Object):

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

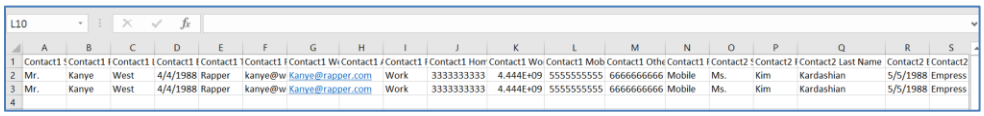
Download the Data Import Template

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



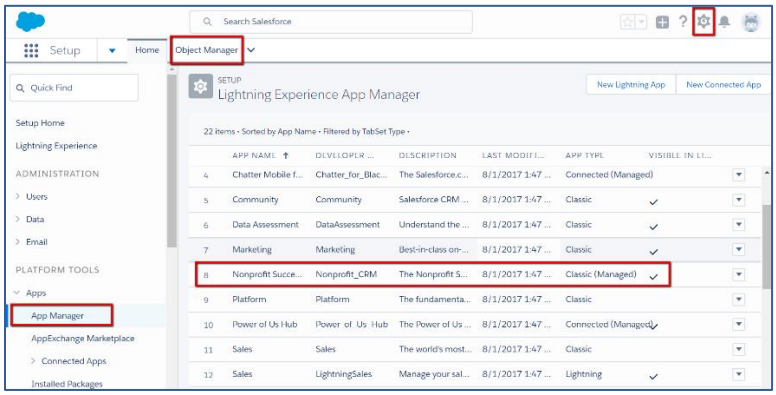
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	Contact1 S	Contact1 F	Contact1 L	Contact1 E	Contact1 T	Contact1 F	Contact1 Wi	Contact1 A	Contact1 F	Contact1 Hom	Contact1 Wo	Contact1 Mob	Contact1 Othe	Contact1 F	Contact2 S	Contact2 F	Contact2 Last Name	Contact2 E	Contact2
2	Mr.	Kanye	West	4/4/1988	Rapper	kanye@w	Kanye@rapper.com		Work	3333333333	4.444E+09	55555555555	6666666666	Mobile	Ms.	Kim	Kardashian	5/5/1988	Empress
3	Mr.	Kanye	West	4/4/1988	Rapper	kanye@w	Kanye@rapper.com		Work	3333333333	4.444E+09	55555555555	6666666666	Mobile	Ms.	Kim	Kardashian	5/5/1988	Empress
4																			

NOTES

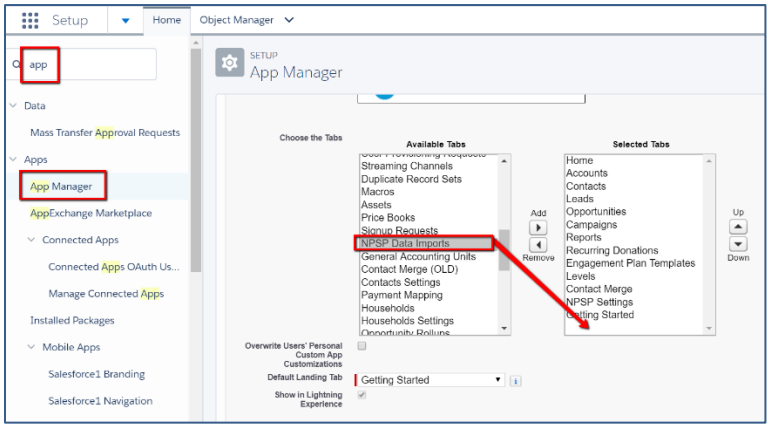
- If you are entering contacts, DO NOT enter a Household or Account Name; these will be auto-generated by the NPSP

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)

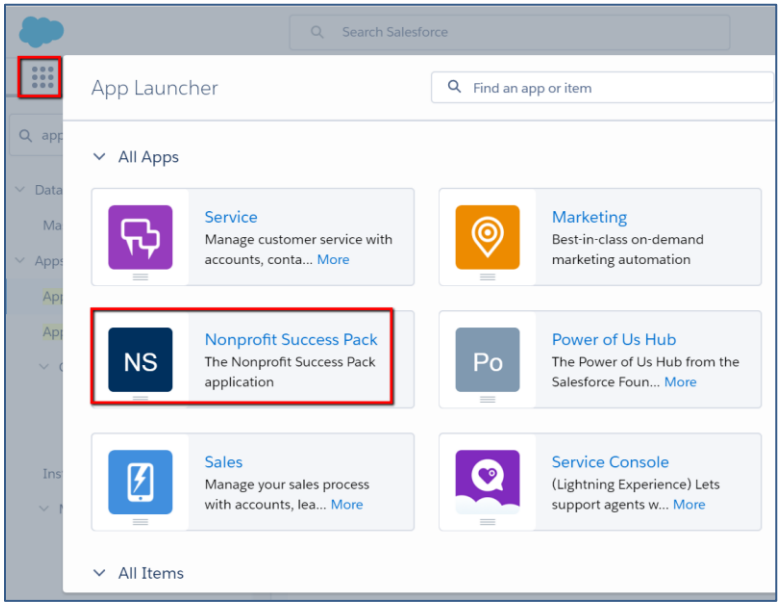


Drag NPSP Data Imports from Available Tabs to Selected Tabs



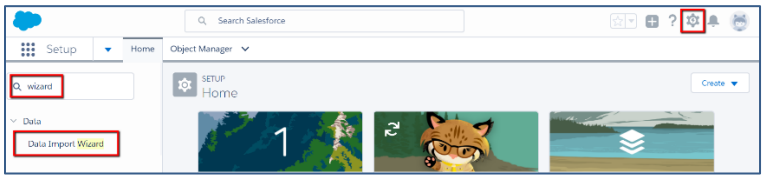
To return to the editing screen:

- Click the Apps Square
- Click Nonprofit Success Pack

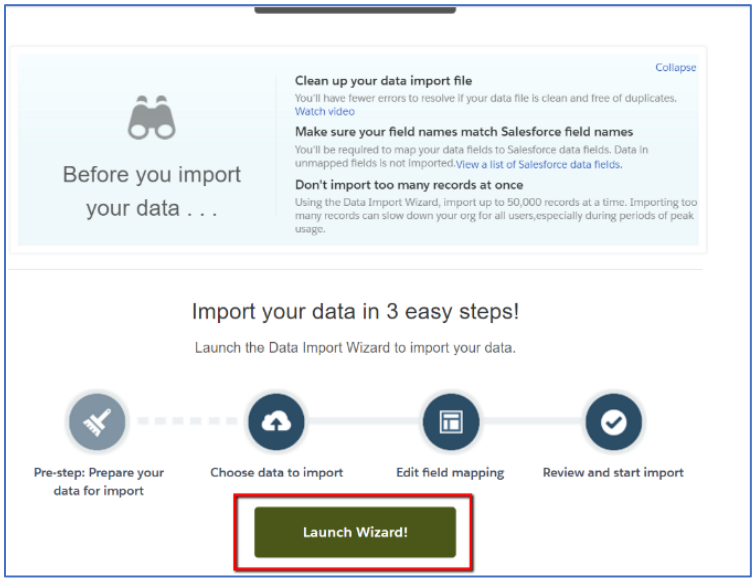


Upload data into the NPSP Data Imports Custom Object

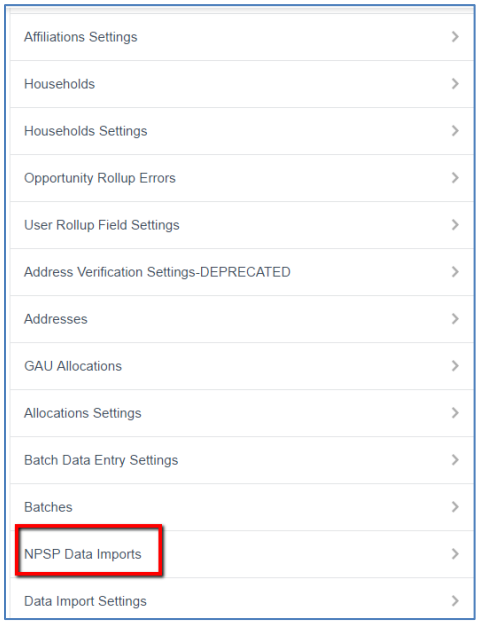
- Click Setup >> Data Import Wizard



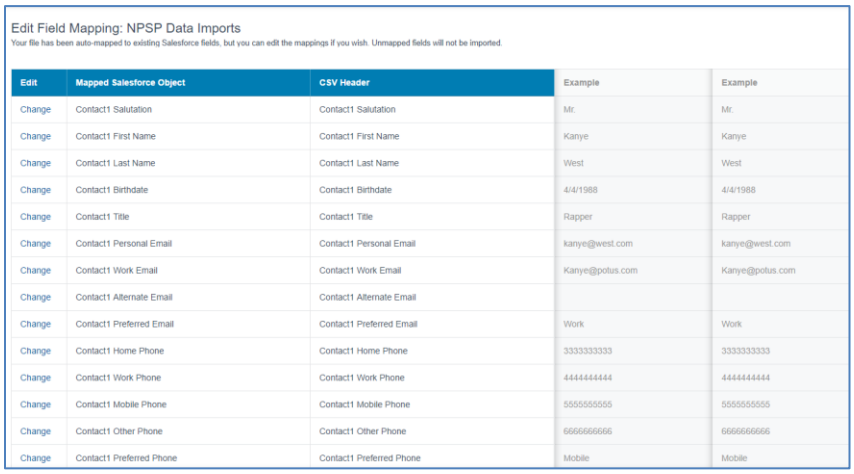
- Click Launch Wizard



- 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



- 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



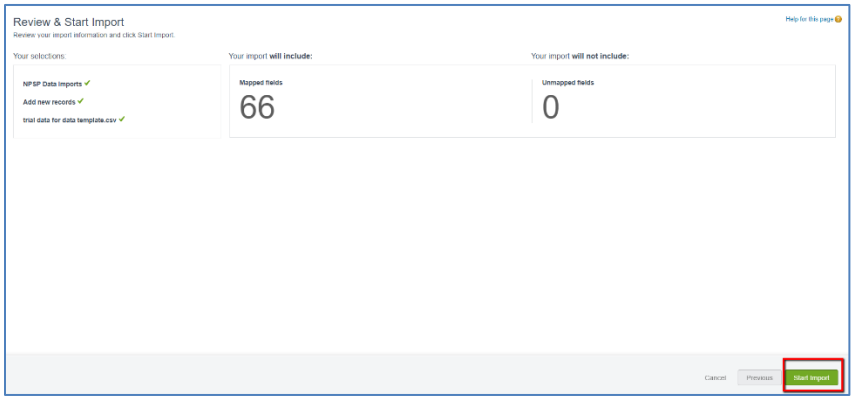
Edit Field Mapping: NPSP Data Imports

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.

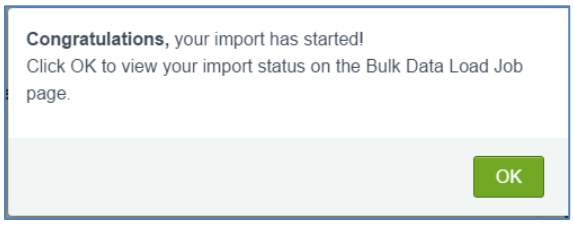
Edit	Mapped Salesforce Object	CSV Header	Example	Example
Change	Contact1 Salutation	Contact1 Salutation	Mr.	Mr.
Change	Contact1 First Name	Contact1 First Name	Kanye	Kanye
Change	Contact1 Last Name	Contact1 Last Name	West	West
Change	Contact1 Birthdate	Contact1 Birthdate	4/4/1988	4/4/1988
Change	Contact1 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

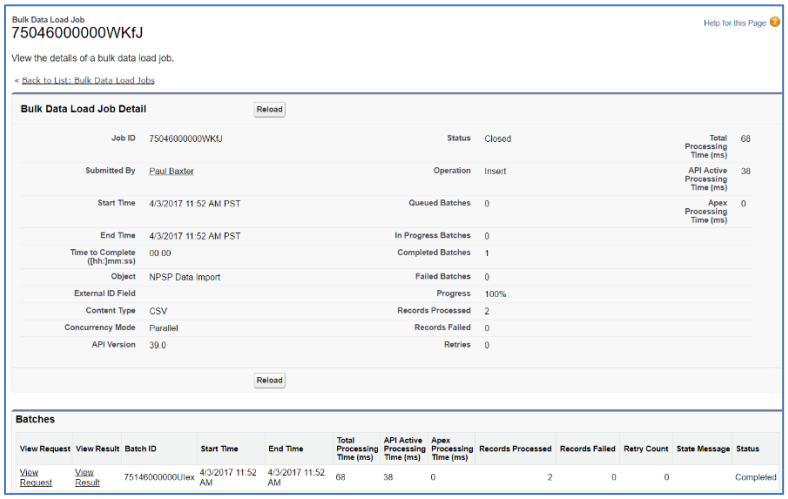
- Type of Import (New Records)
- Number of Fields
- Name of csv File



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

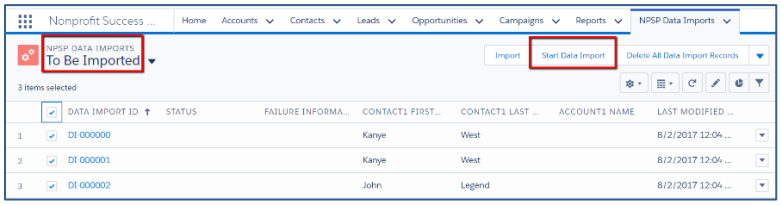


- Review Load Job

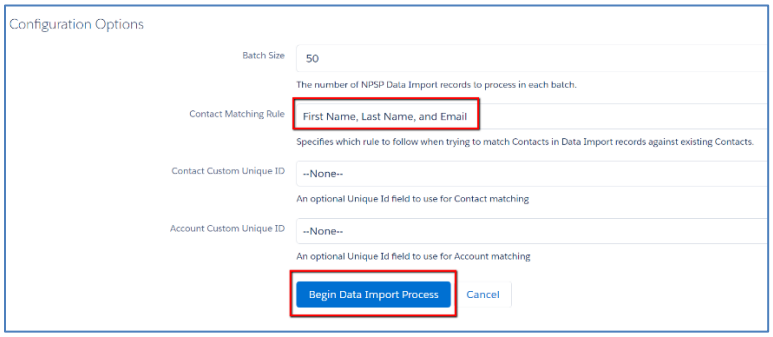


Transfer data in the Object to Standard Objects: Account, Contact, and Opportunity

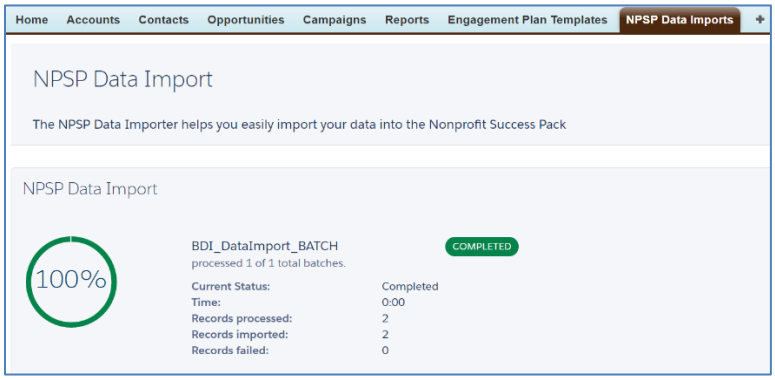
- Click on the NPSP Data Imports tab
- Change the View to "To Be Imported" (if necessary)
- Click "Start Data Import"



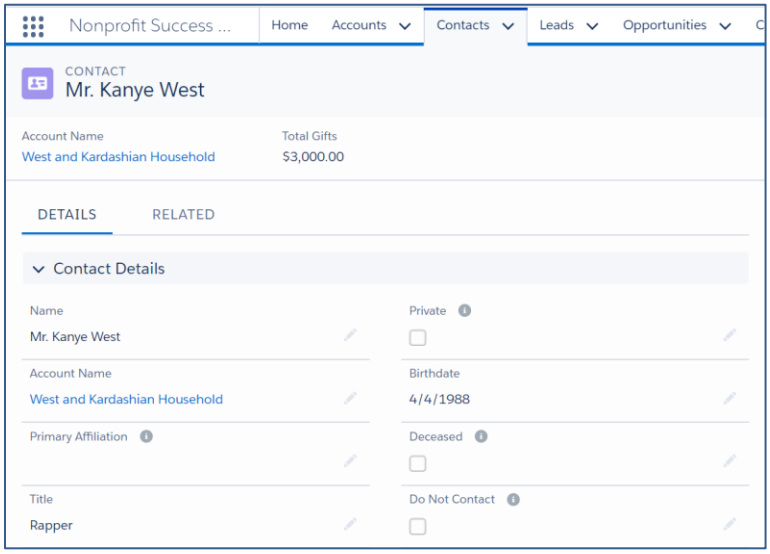
- Click Begin Data Import Process
- Note that if you want to change the default matching rule, you can do it here



- 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

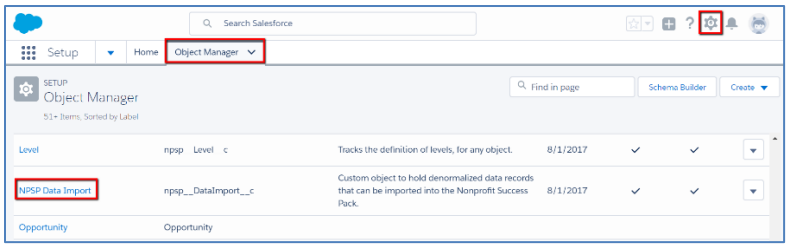
Create the custom field on the standard object

- 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"*)

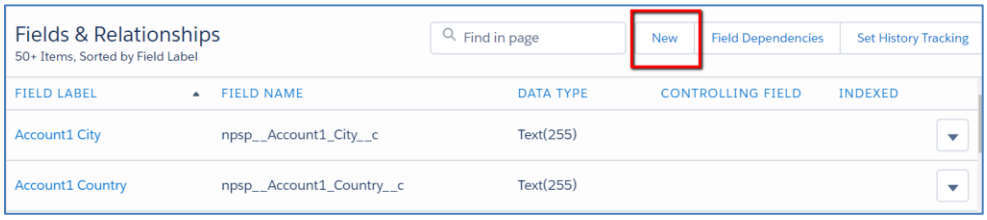
- Copy the API Name to your Notepad for use later

Create the custom field on the Data Import object

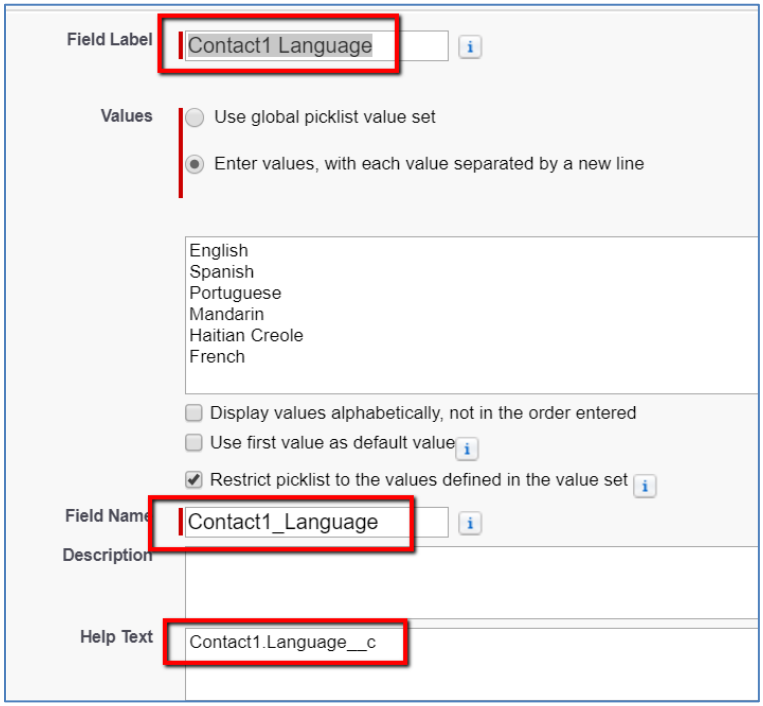
- Click Setup
- Click Object Manager
- Click NPSP Data Import



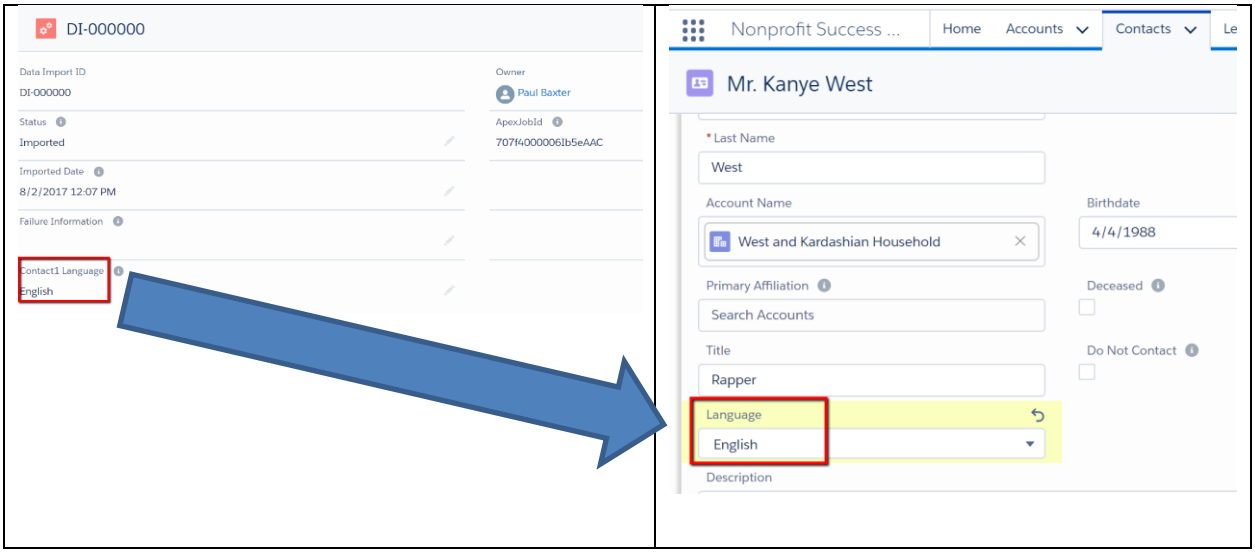
- Click Fields and Relationships
- Click New



- 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



- *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



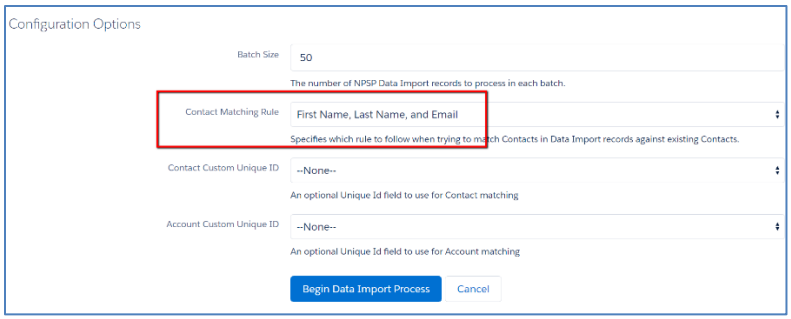
Updating Data with the NPSP Data Import Object

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.



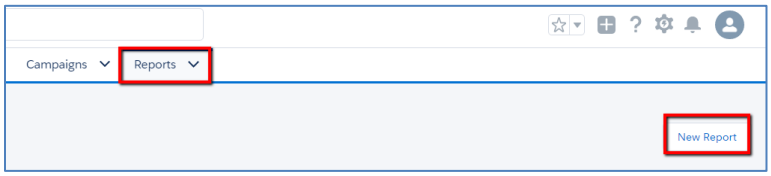
REPORTS

Creating a Report of Constituents

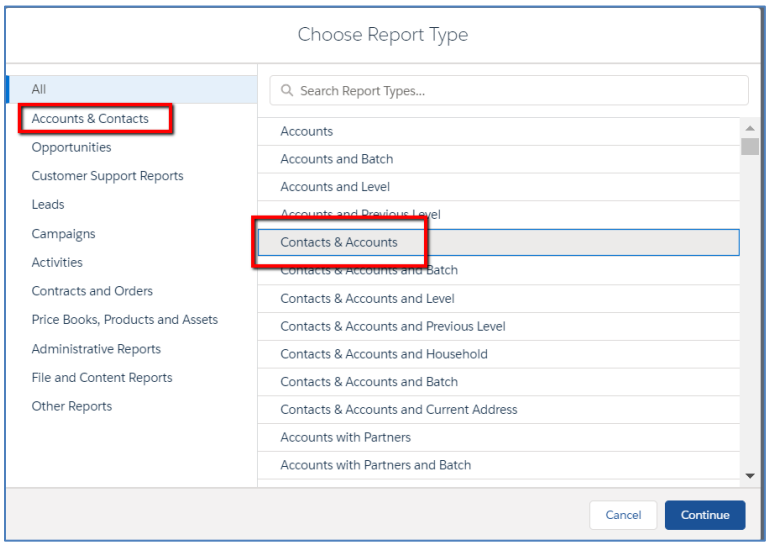
You can create original reports based on any object in Salesforce. The most common to use are Contact, Account (Organization) and Opportunity (Donation)

To create a Constituent (Contact) report:

- Click Reports
- Click New Report

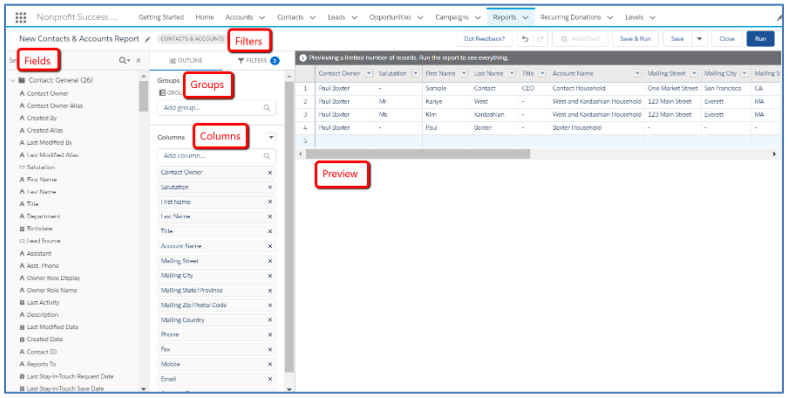


- From the Choose Report Type window select Account & Contacts
- Select the "Contacts and Organizations" template
- Click Continue



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

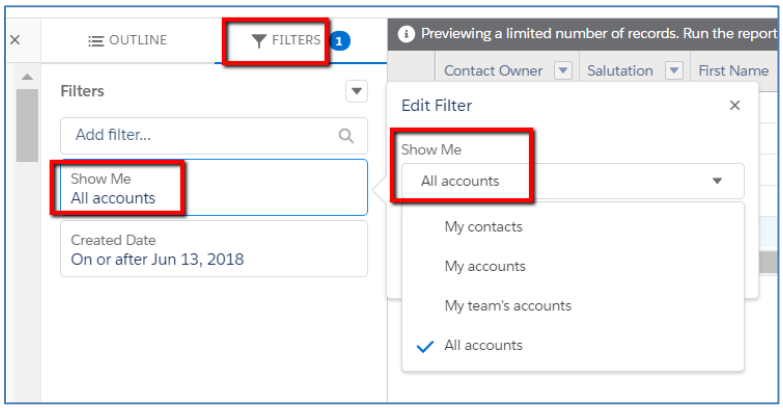
- **Fields** – a list of all available fields on the object you selected. In this case it will include all fields on the Contact and Account objects, including all custom objects. Any of these can be used in the report
- **Columns** – a list of the fields that are part of your report.
- **Groups** – 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
-

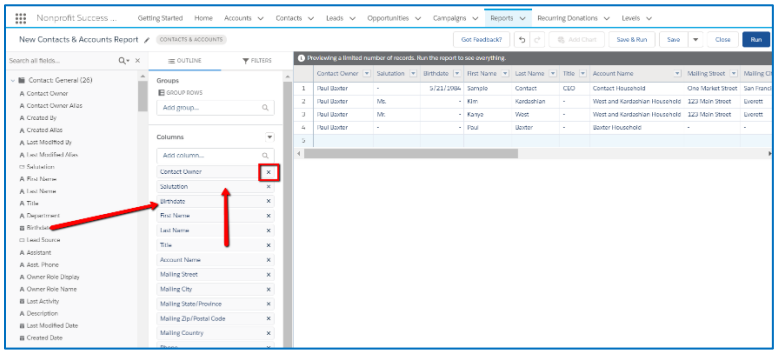


Selecting Fields to Appear on your Report

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



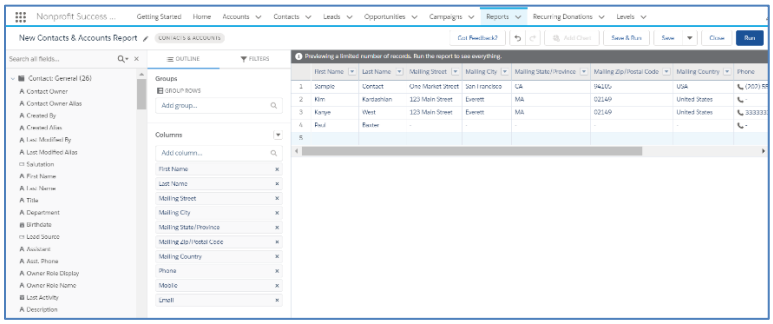
Add (or keep) the following fields in your report:

- 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:

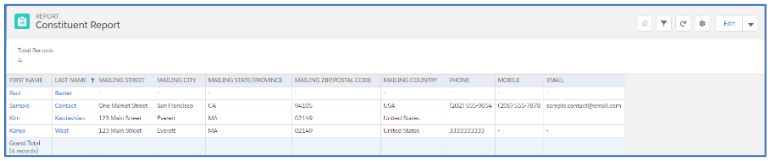


Before you can run a report, you must save it

- 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:

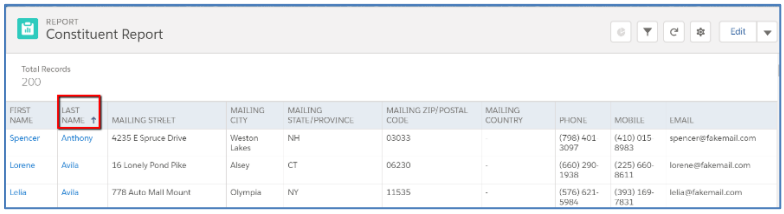


Sorting a Report

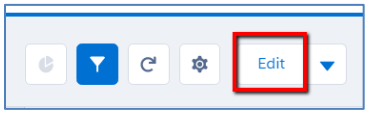
Once you create and save a report there are several tools for zeroing in on the specific information you are looking for. Sorting allows you to put your records in order according to one of the fields in the report. You can sort in editing mode or after you run the report.

To sort by Last Name

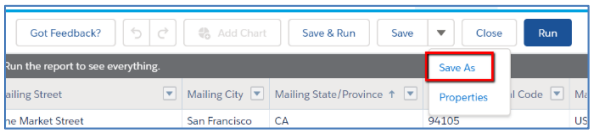
- Click the Last Name field name at the top of the report to sort A-Z (arrow points up)
- Click again to sort Z-A (arrow point down)



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



- Sort by Mailing State/Province

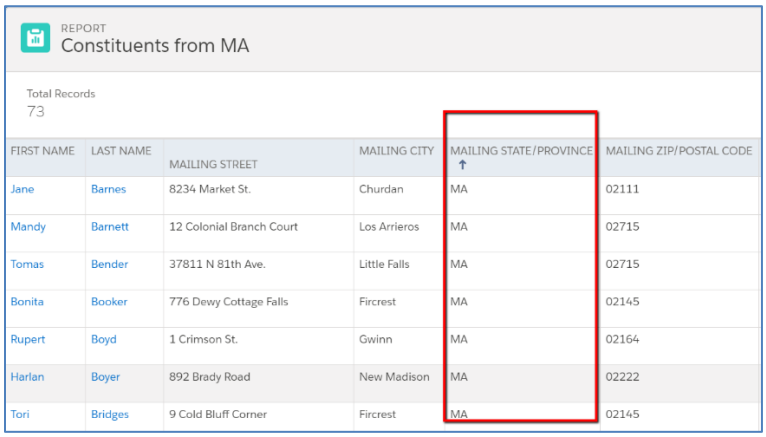


- Click Save As and Name the Report “Constituents by State”
- Save in Report Folder = “Private”
- Click “Save and Run Report”

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

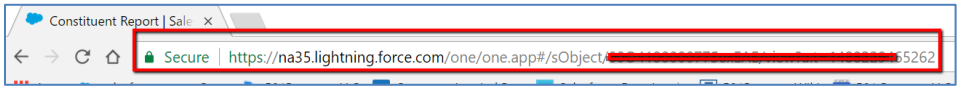
Total Records
73

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

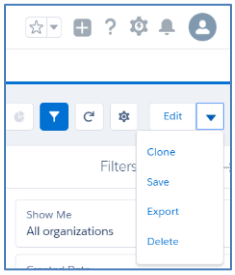
You may want to send the results of a report to a colleague. If that person has an account in your organization's Salesforce, there are two ways to do it.

- 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

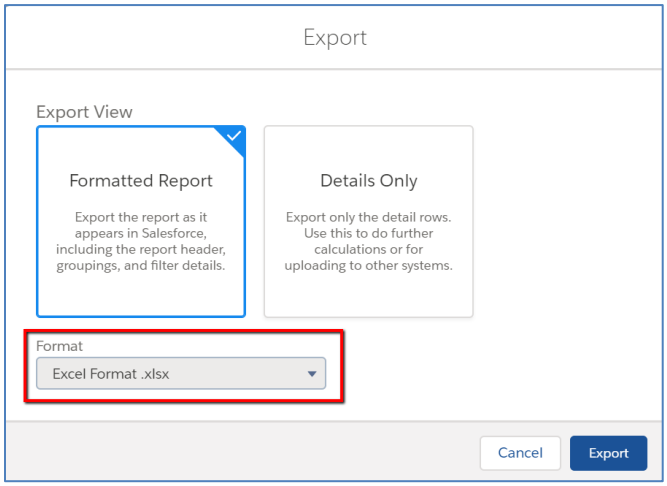


If you want to share the report with someone who does not have access to your Salesforce account, you will have to Export the Report into Excel or another spreadsheet program:

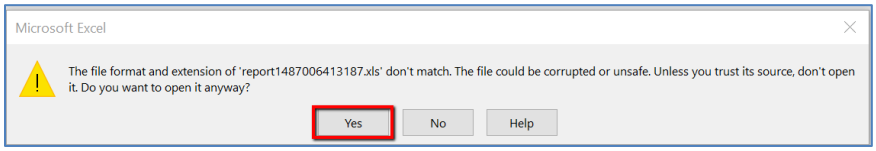
- Open the Report "Constituents from MA"
- Click the down arrow button in the upper right
- Click Export



- 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

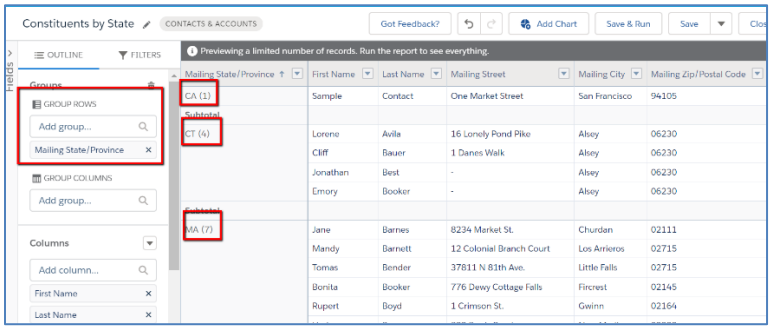
NOTE: Once you have exported a report it is no longer dynamic: any subsequent changes that you make in Salesforce will NOT appear in the downloaded report

Create a Group Report

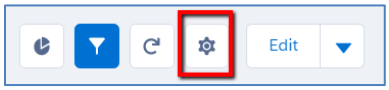
A Group Report makes it easier to gain an overview of your information

- Click Reports
- Click Constituent Report
- Click Edit

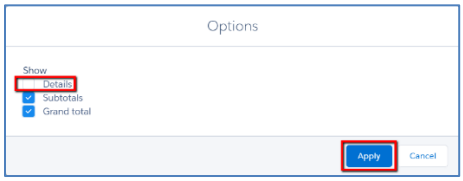
- Click Outline
- Use the Lookup under Group Rows to select Mailing State/Province



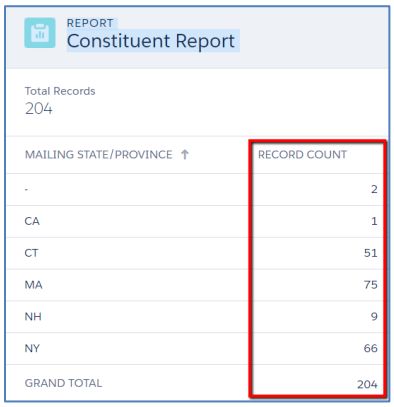
- Click Run
- The Group will both sort the records and provide the number of records for each State
- Click the Report Setup Icon



- Uncheck Details and click Apply



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

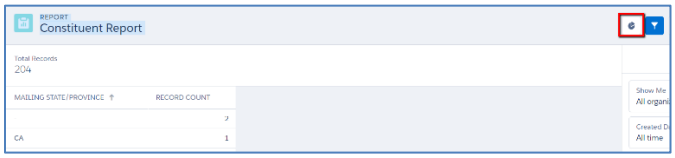


- Click Save (under down arrow to right)

Creating a Chart

NOTE: Charts can only be created from a Group Report

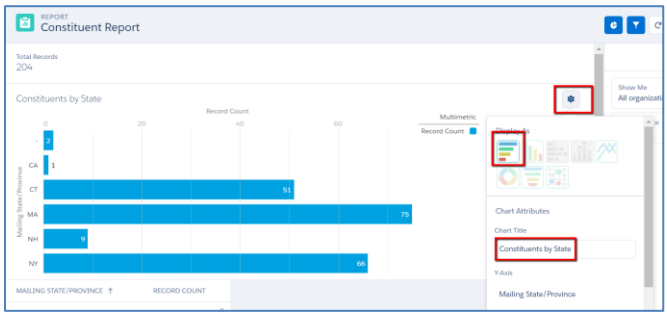
From the Constituent Report, click the Toggle Chart button



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

Click the Chart Setup Icon and select

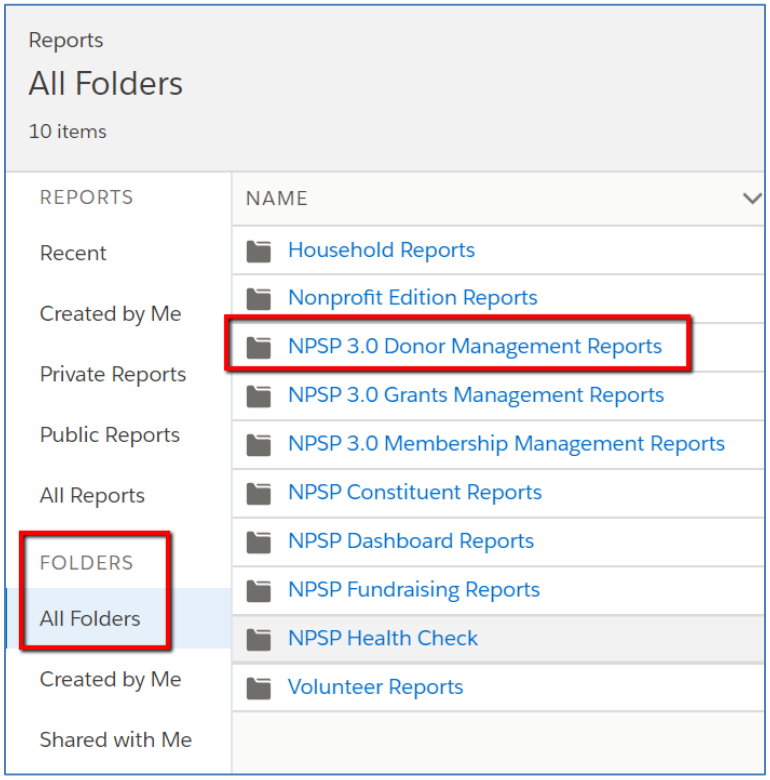
- Chart Type
- Chart Title
- Click Save (drop down arrow on right)



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.**



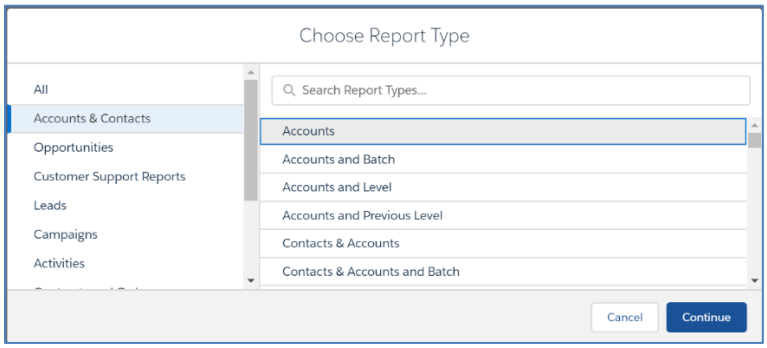
Among the reports found there are

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

Creating a Donor Mailing List

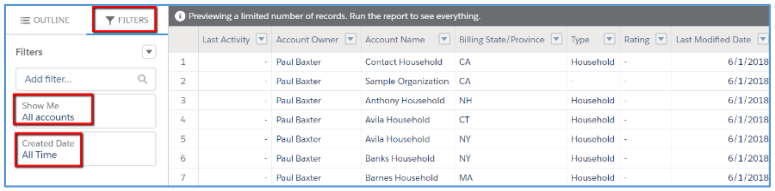
When you create a mailing list for donors, remember that all donations are attached to Accounts (Households) rather than individuals. You will therefore run an Account Report instead of a Contact (or Individual) Report

- Start with the Reports tab and Click "New Report"



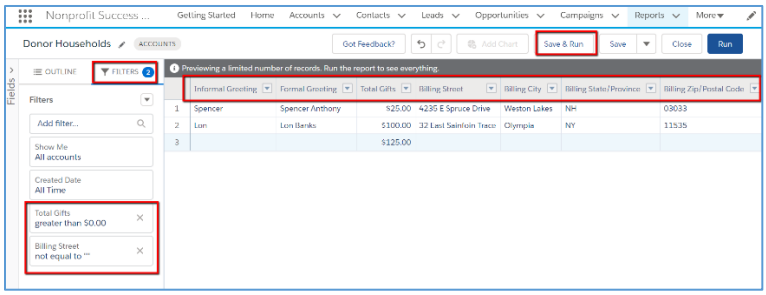
- Under the "Accounts and Contacts" Folder, click "Accounts"

- 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”



- 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



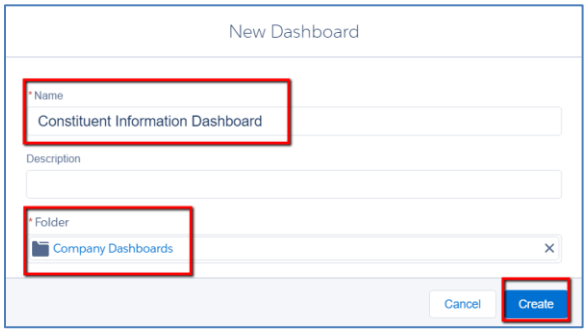
- To complete the process, Save and Run Report
- Use “Export Details” to send the data to Excel, from which you can merge the mailing addresses with Word to create letters, labels, etc.

Dashboards

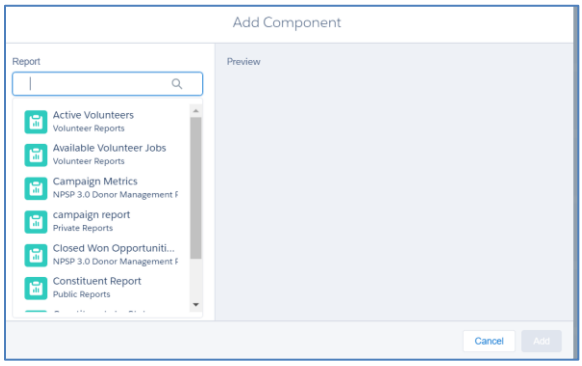
A Dashboard allows you to view multiple charts on the same screen, even charts based on different reports. Like a Chart, Dashboards can only be based on Summary Reports.

- Select Dashboards Tab
- Click “New Dashboard”

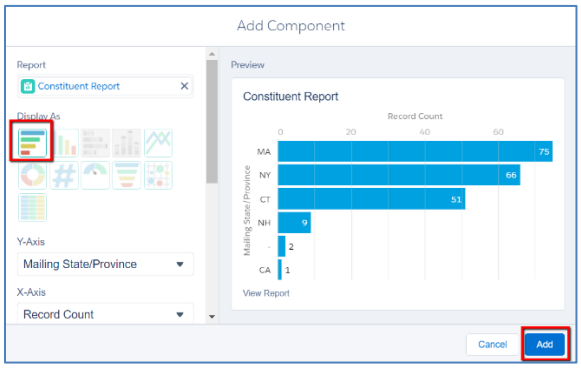
- Enter Name and Folder
- Click Create



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



Click Add Component to select Chart Type



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

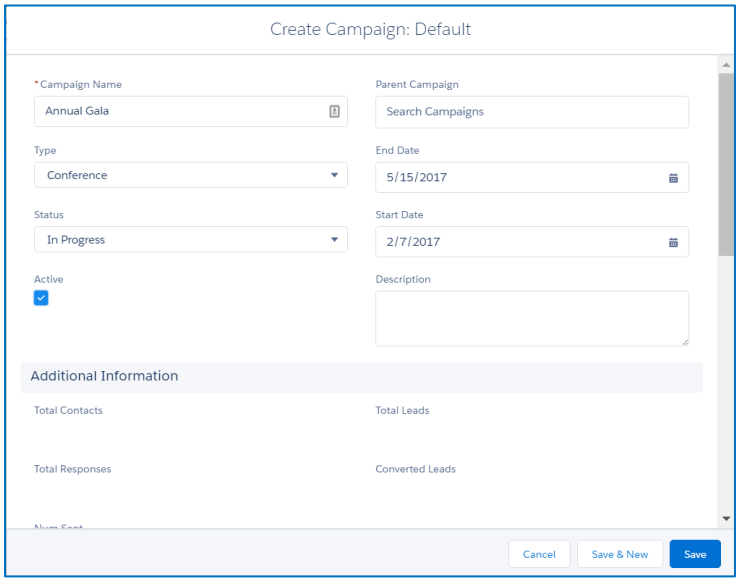
CAMPAIGNS

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.

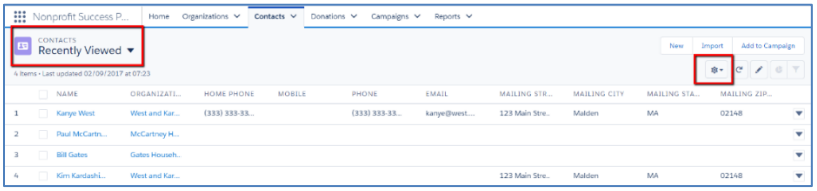
- Click Campaigns >> New (or New Campaign under the down arrow next to "Campaigns")
- Click Default
- Complete the following field:
    - Campaign Name = Annual Gala
    - Status = In Progress
    - Start Date = Today
    - End Date = May 15
    - Click the Active box
    - Click Save



Adding Attendees (Campaign Members)

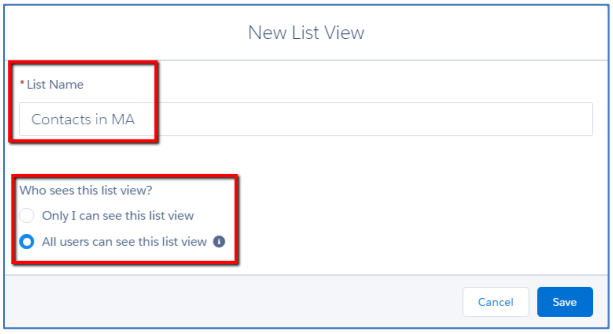
To add members to a campaign, start from the Contact object (not a particular Contact) and create a List View. A List View is a simple report

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

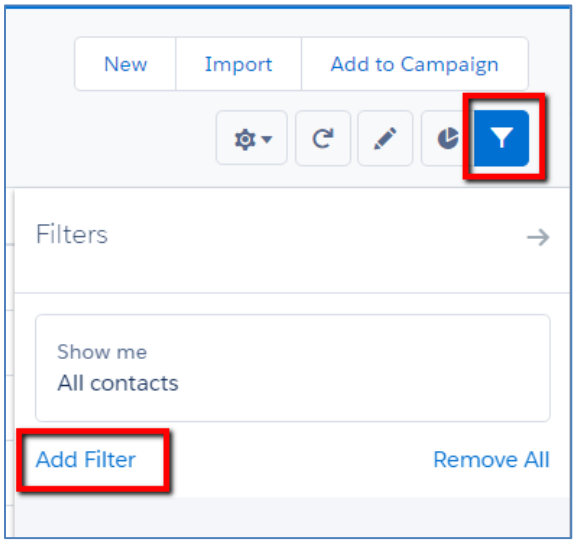


To create a List View for "Contacts in MA"

- 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

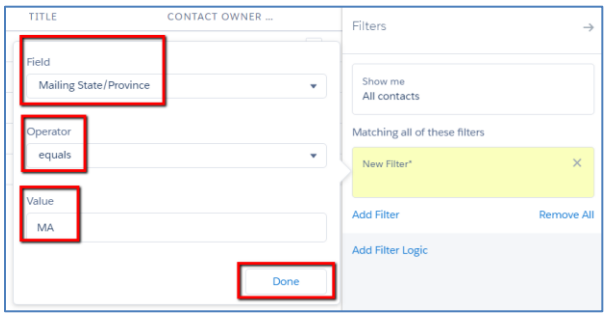


- Click the Filter button (a funnel)
- Click Add Filter



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

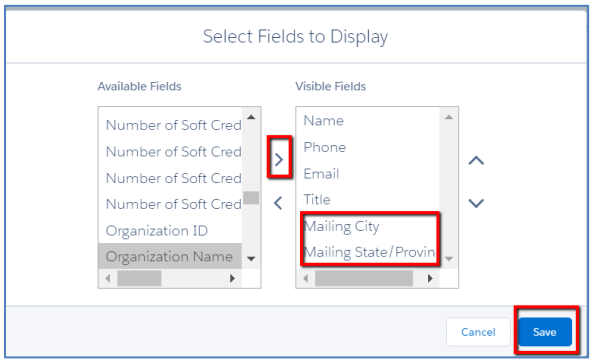
- Operator = Equals
- Value = MA
- Click Done



- Click Save

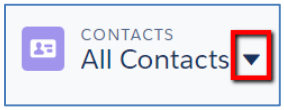
Now adjust the List View to show Mailing City and Mailing State/Province

- 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

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

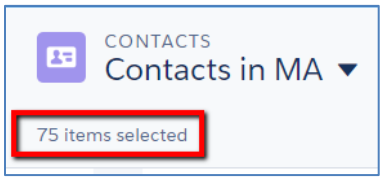


Using a List View to Add Contacts to a Campaign

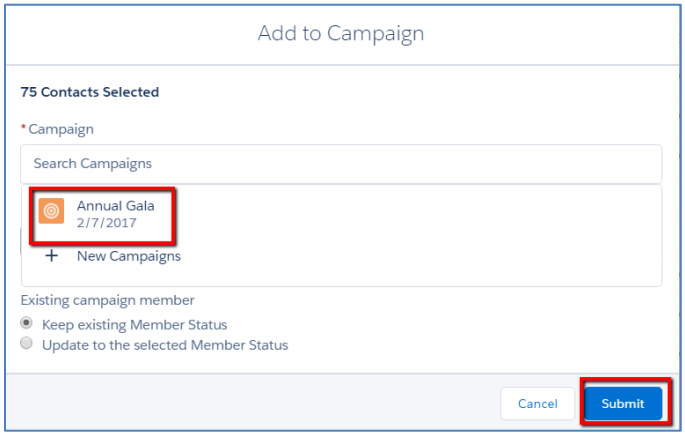
- From the "Contacts in MA" List View, select the contacts to join the Campaign
- To select all the Contacts, click the top box; otherwise click one at a time

- Click Add to Campaign

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

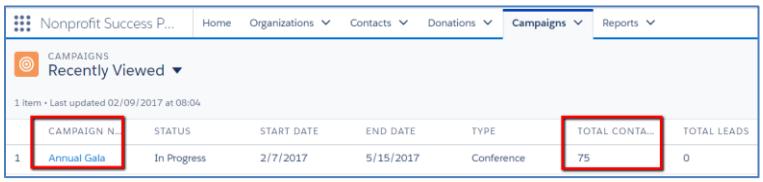


- Select Annual Gala
- Click Submit



To confirm that you had added the Campaign Members

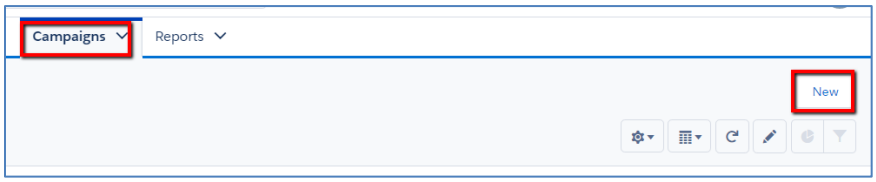
- Click Campaigns
- Next to the Campaign Name Annual Gala, it says Total Contacts = 75



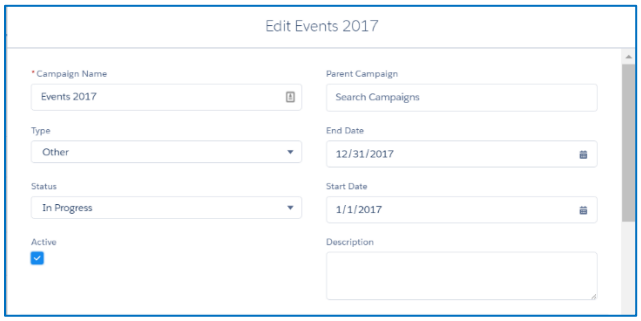
Parent and Child Campaigns

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"

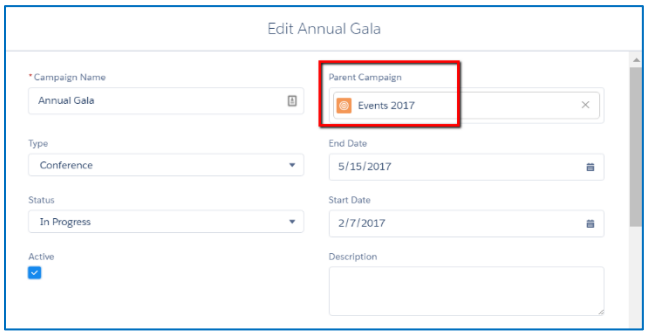
- Campaigns >> New >> Default



- 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



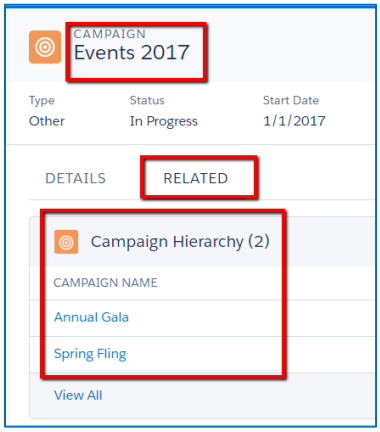
Now open Annual Gala to add it under Events 2017
Click Edit
Under Parent Campaign, use the lookup to select Events 2017 (no not type in)



- 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

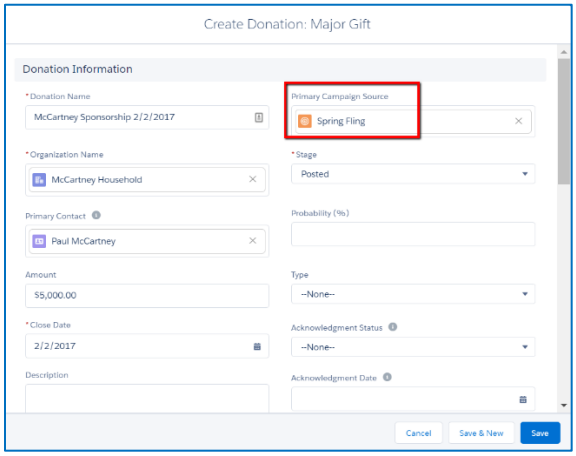


Using Campaigns to Track Donations

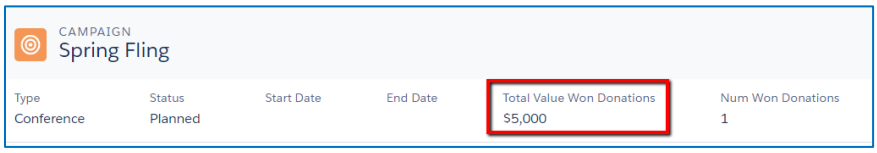
Your organization may want to give donors the opportunity to direct their donations to specific purposes. For example, Paul McCartney wants to sponsor the Spring Fling by donating $5000. Campaigns can be used to identify such directed donations

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



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

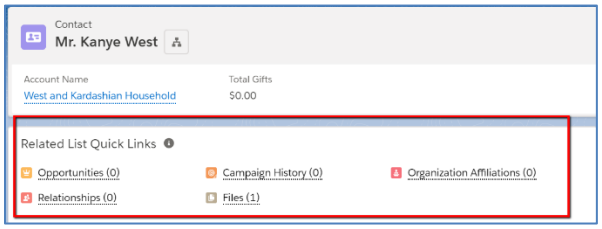


CUSTOMIZING SALESFORCE (FOR SYSTEM ADMINISTRATORS)

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

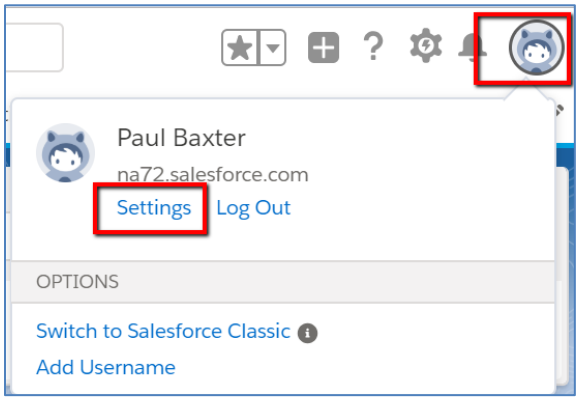
Related List Quick Links

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

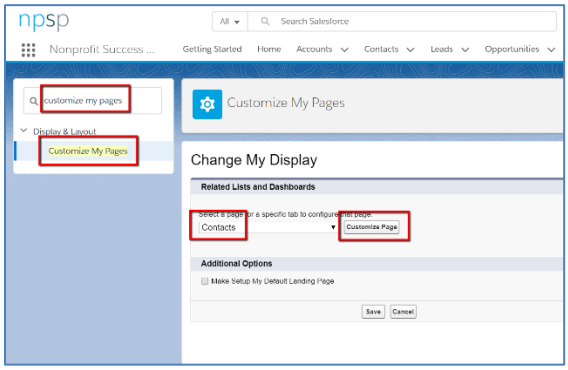


You can specify which Related links you want to have appear:

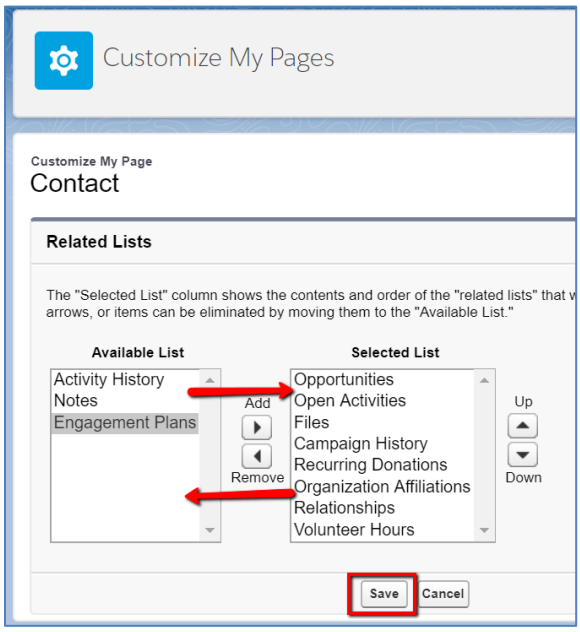
- Click on the little boy icon
- Select Settings



- Use the Quick Look up 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.

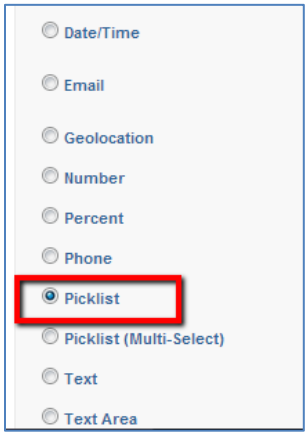
- To create the custom field "Native Language" on the Contact object, start from Kanye West's (or any other Contact's) record.
- Click the Setup icon to open the menu
- Click Edit Object
- Click Contacts

- Under Fields & Relationships click New

Creating a Field takes Four Main Steps:

Step 1. Select Field Type

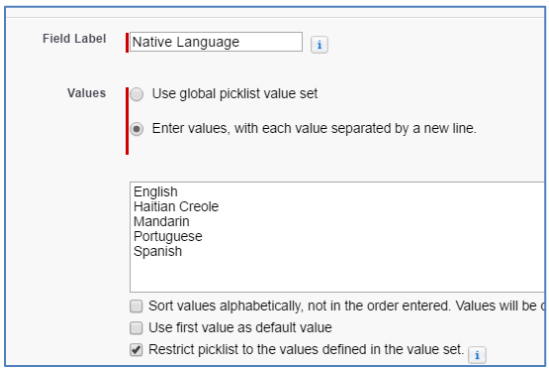
- For this field, we will choose "Picklist"
- Click "Next" (in the lower right corner of the page)



Step 2. Give the Field a Name

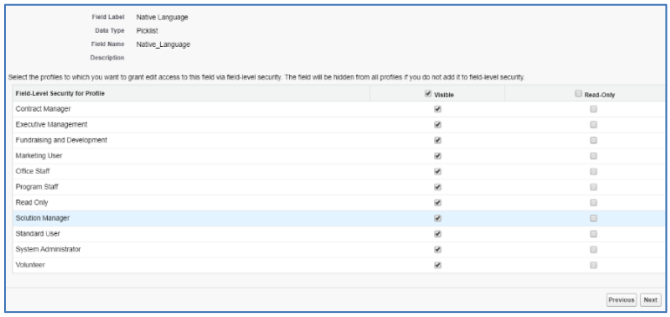
- Field Label = Native Language
- Enter Picklist Values:

  English
  Haitian Creole
  Mandarin
  Portuguese
  Spanish
- Click "Next"



Step 3. Specify Who can See the Field

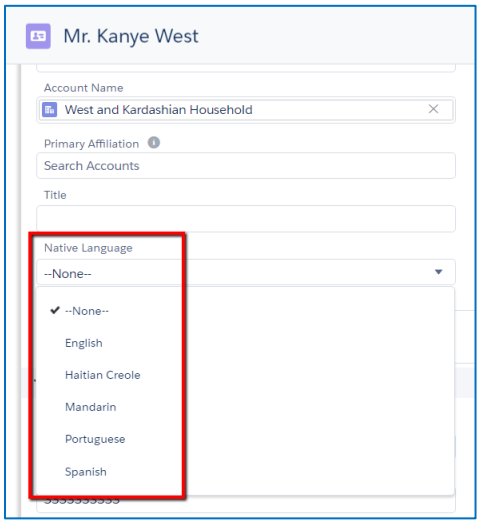
- Select the proper field-level security, which specifies which User Profile can see or edit the new field ("Visible" vs. "Read-Only")
- Keep the default of Visible to every Profile
- Click "Next"



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:

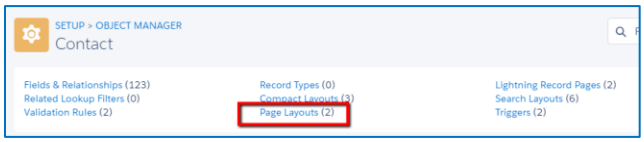


Edit Page Layouts

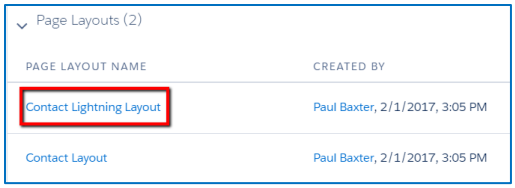
Move "Native Language" to a different location on the page

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

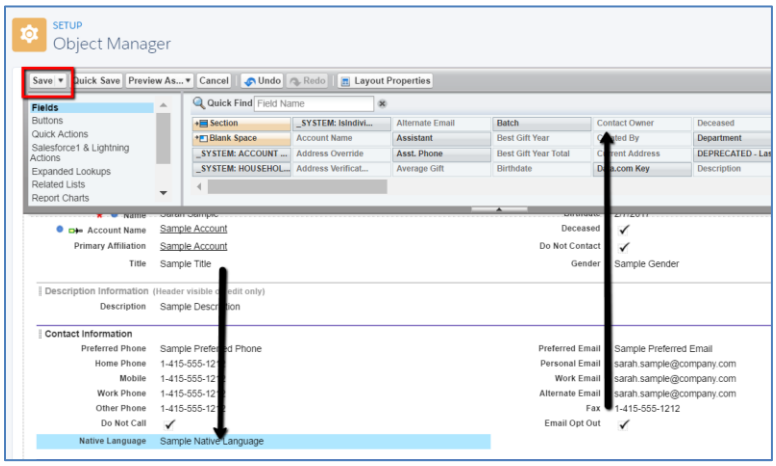
- Click Object Manager
- Select Contacts
- Click Page Layouts



- Click Contact Lightning Layout

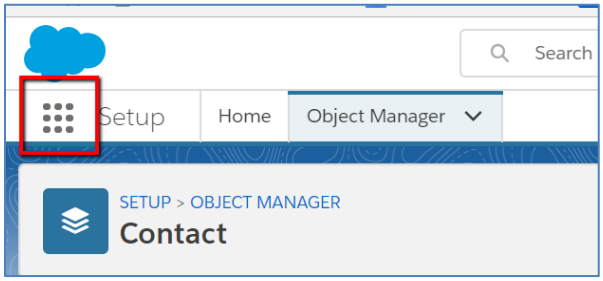


- Use Drag and Drop to move Native Language down into the Section called Contact Information
- Use Drag and Drop to remove the Fax field (drag it to the "Field Box")
- Click Save (in the upper left hand corner of the Field Box)

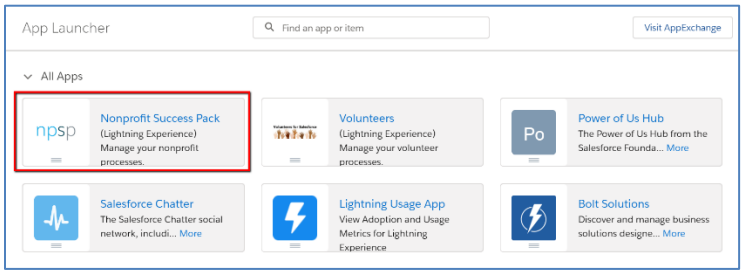


Return to "NPSP" App

- Click the App Launcher in the upper right hand corner

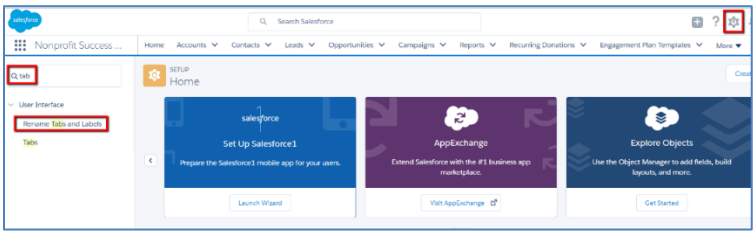


- Select the NPSP App

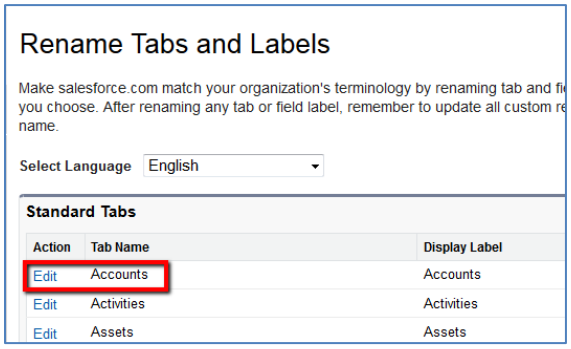


Rename "Account" and "Opportunity" Tabs

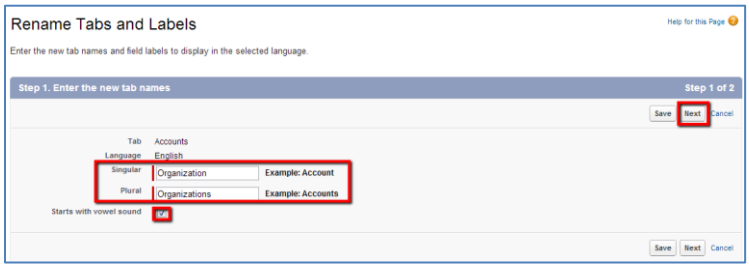
- Click on the Setup Icon
- Click Setup Home
- In the Setup Search Bar type "tab"
- Click "Rename Tabs and Labels"



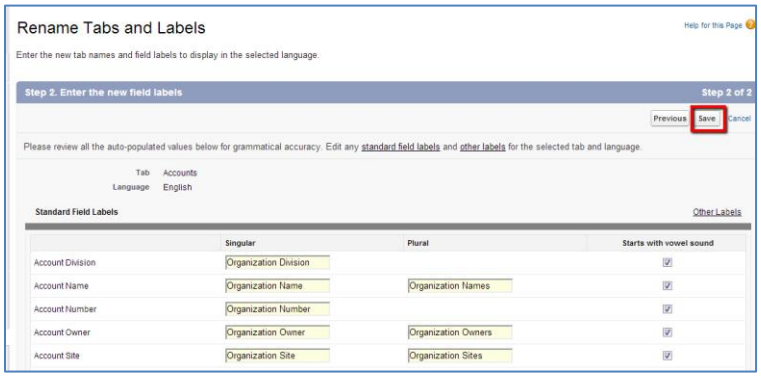
- Click "Edit" next to "Accounts"



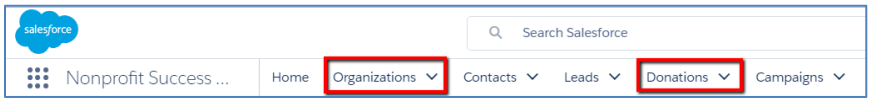
- Rename “Account” to “Organization”
- Rename “Accounts” to “Organizations”
- Click Next
- Keep “Starts with a vowel” checkbox checked
- Click “Next”



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

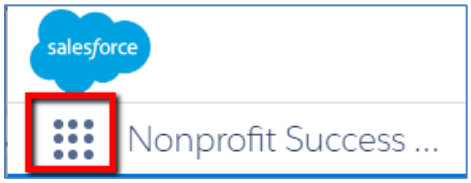


The tabs are renamed:



Adding or Removing Tabs From an App

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



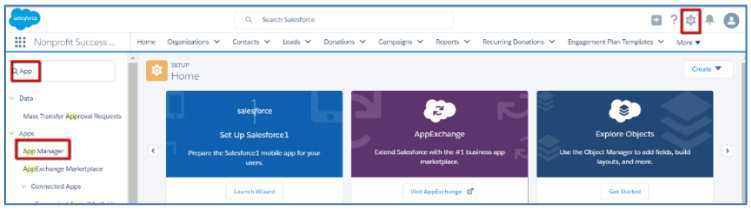
An App is a collection of tabs, generally connected to a particular job description or set of responsibilities. The NPSP comes with the following Apps:

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

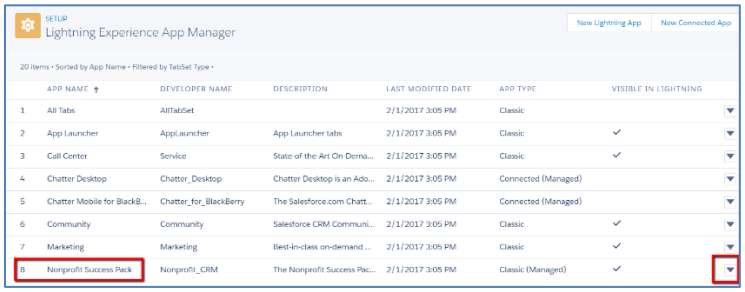
You can edit any of these apps or create a new app. Only the System Administrator should do this, however, because these changes can affect everybody's Salesforce account.

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



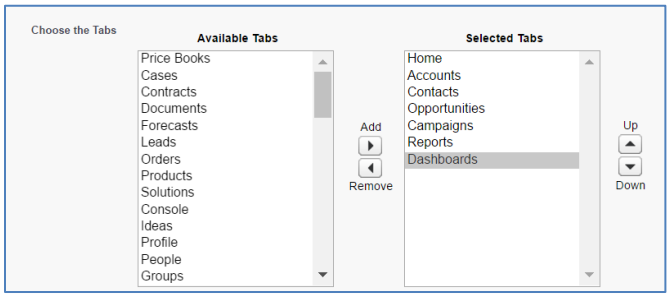
- Find the Nonprofit Success Pack app, then click on the down arrow
- Click Edit



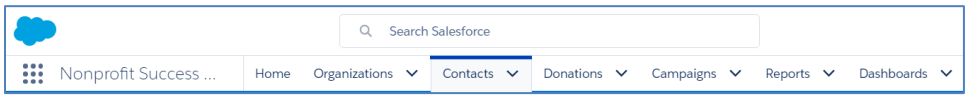
- Remove tabs by selecting them and clicking the Remove button
- Leave only the following tabs:
  - Home
  - Accounts
  - Contacts
  - Opportunities

- Campaigns
- Reports
- Dashboards

- Make Home the Default Landing Page

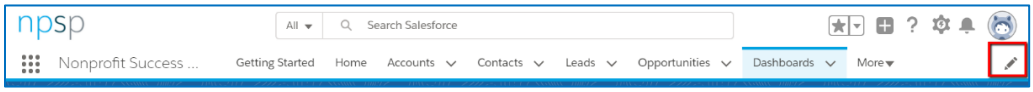


- Click Save
- Click on the App Launcher (checkerboard) to re-launch the Nonprofit Success Pack app.
- Now only 7 tabs are visible

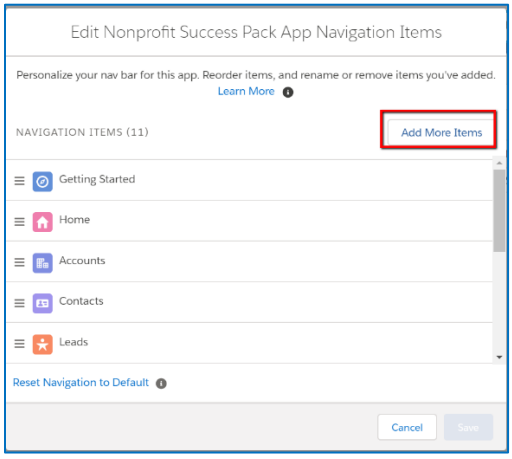


Quick Way to Add/Remove Objects to Nav Bar:

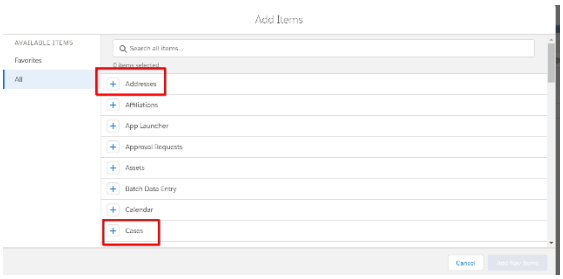
- Click Pencil icon to right of Nav Bar



- 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

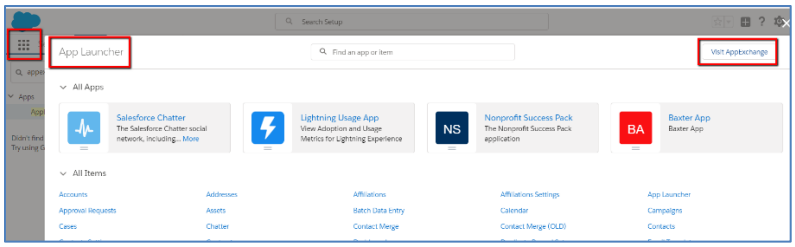
Note: you can only delete items you have added, not ones that belong to the app as created by the System Administrator (see above)

USING THE "APPEXCHANGE"

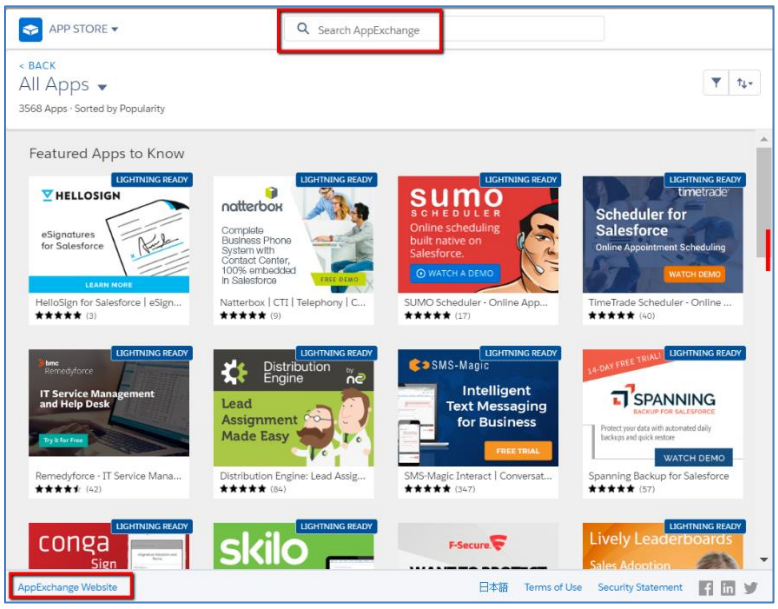
Salesforce offers a lot of flexibility, but it is not designed to do everything. For everything else, there is the AppExchange, a marketplace of applications created by third-party vendors that integrate with Salesforce for tasks like mass marketing, online donations, document generation, and creating 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,

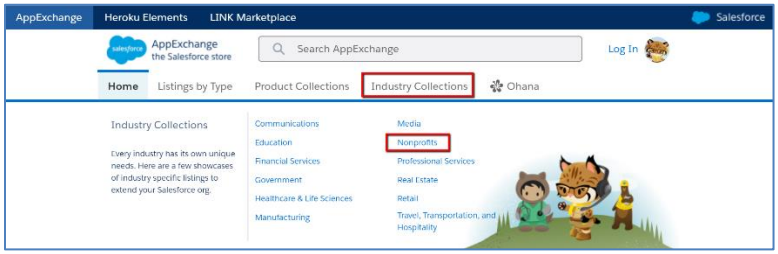
- Click the grid icon in the upper left corner of your screen to enter the App Launcher
- Click the button on the right marked "Visit AppExchange"



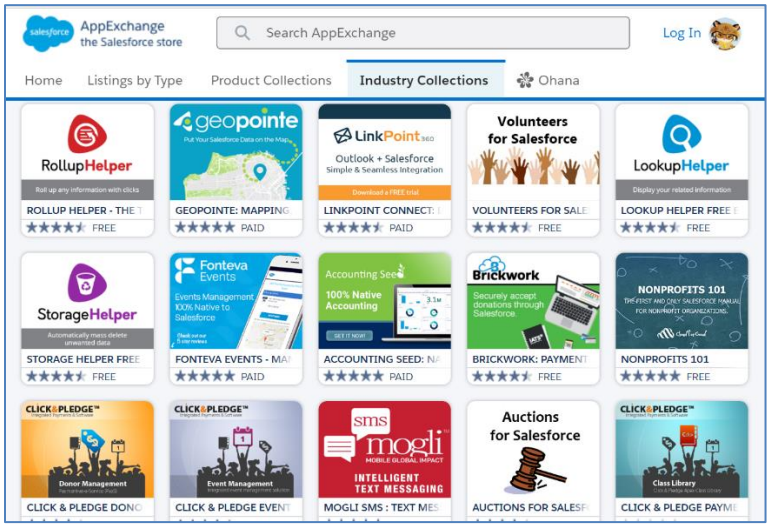
- If you are searching for a specific app, you can do it from here.
- If you are just browsing, go to the AppExchange website



- 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.