Salesforce Query

Or

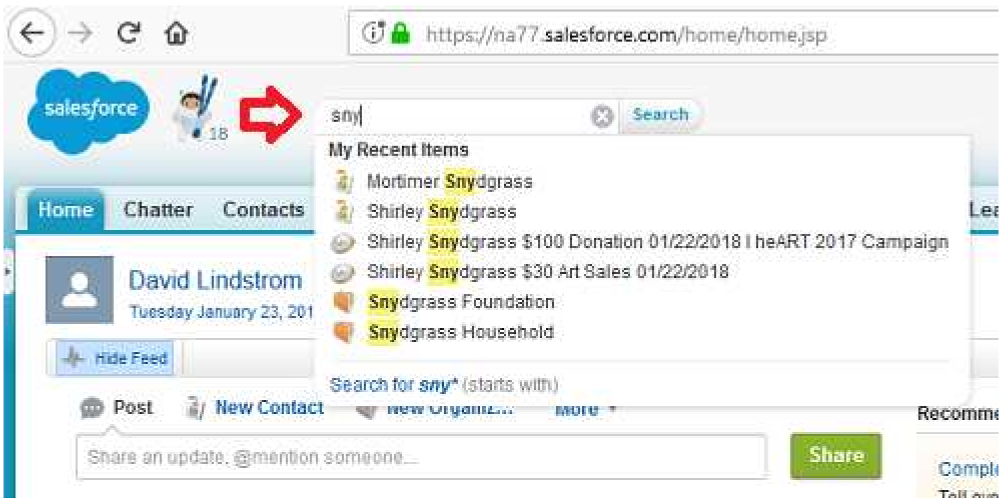
What to do when the TV is Broken

CONTENTS

1 GETTING INFORMATION OUT OF SALESFORCE

1.1 WHEN IN DOUBT, SEARCH

We covered this a little bit in the last training module. When you need to lookup information on a person or company, use the ***Search*** window at the top.



As shown above, I started typing-in the first letters of the last name of someone I want to lookup (**red** arrow). **After typing only the first three letters, I have narrowed down the Search.**

Search TIPS:

It doesn't matter whether you trying to find and Account, a Contact, an Opportunity.

Always search first. (It is usually the quickest way to get to where you want).

Don't worry about capitalization.

Search on a Last Name and/or a First Name. Example: lindstrom or david

Search on an email or part of an email

Search on an address, or part of an address (even just a house number)

Search on a phone number (or part of one)

Search on a zip code

Just start typing letters of the name – a drop-down of possible matches appears

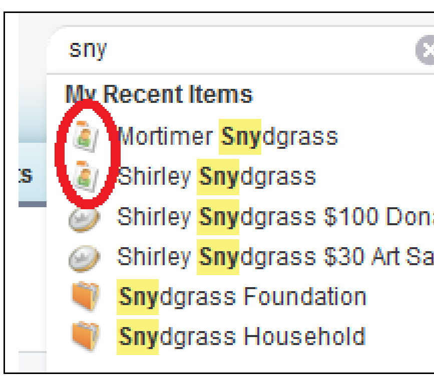
You can search on part of a name. ESPECIALLY GOOD WHEN YOU SUSPECT MIS-SPELLING OR MULTIPLE, DUPLICATE RECORDS - Example: sch* or shn*d*

What if I am not sure about the spelling?

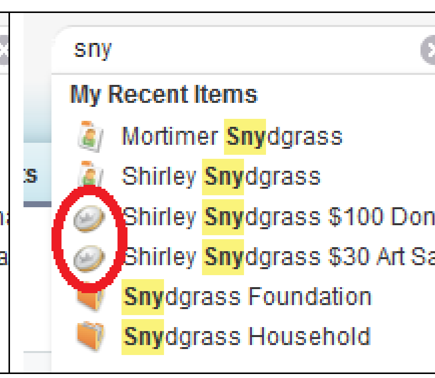
If I wasn't sure if it was spelled, "***Snydgrass***" or "***Snidgrass***," I could use the "*****" character, and type: ***sn*d**** - In other words, the name starts with "*sn*," and has a "*d*" in it.

The Search returns the above records. I know, probably from guessing the first name, which ones I am after. If not, I could look further, but clicking on my best guess, and finding more information (like an email or address) in the detail records.

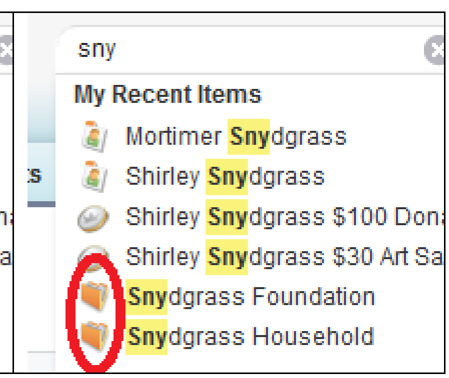
1.1.1 The Search icons and Salesforce Objects



Contact *Record icon*

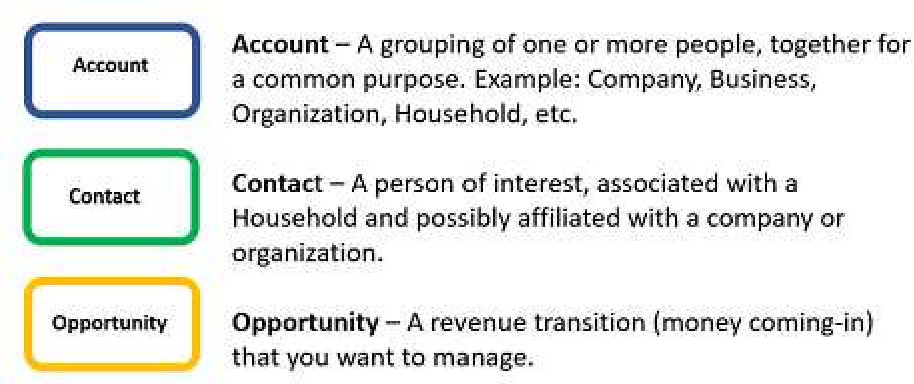


Opportunity *Record icon*



Account *Record icon*

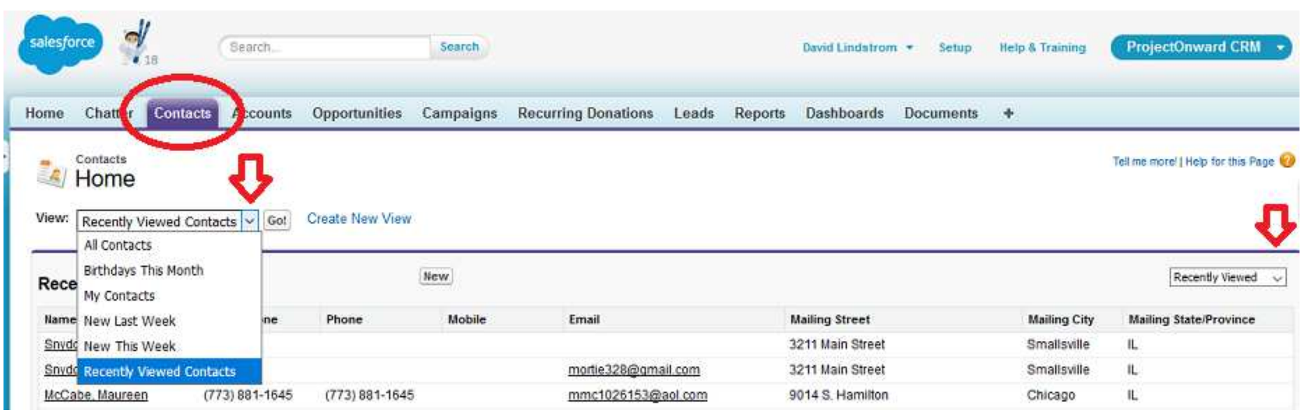
Let's look a little closer. In the above Search, there are three types of *objects*, or record sets to look at. Our person of interest (and another person in his Household) have all three types of records, relating to the Objects below:



- Mortimer and Shirley, who live in the same Household -- at this point, we don't know if they are husband and wife, father and daughter or two people who have the same last name – we would need more detail for that -- each have a Contact record (**red** circle **left**).
- Because there is only Household Account record (**red** circle **right**), I know that both Contacts are in the same Household. (This is more clear on detail screens.)
- The other Account record (**red** circle **right**) is NOT a Household. I know that it must be an Organization Account (which might or might not have anything to do with the Contacts – I would have to look at detail screens to tell further.)
- Shirley has two Opportunity records (**red** circle **middle**). One Opportunity was an Art Sale and one was a Donation.

By clicking on any one of the options, I can go into the appropriate detail records.

1.2 CONTACT RECORDS



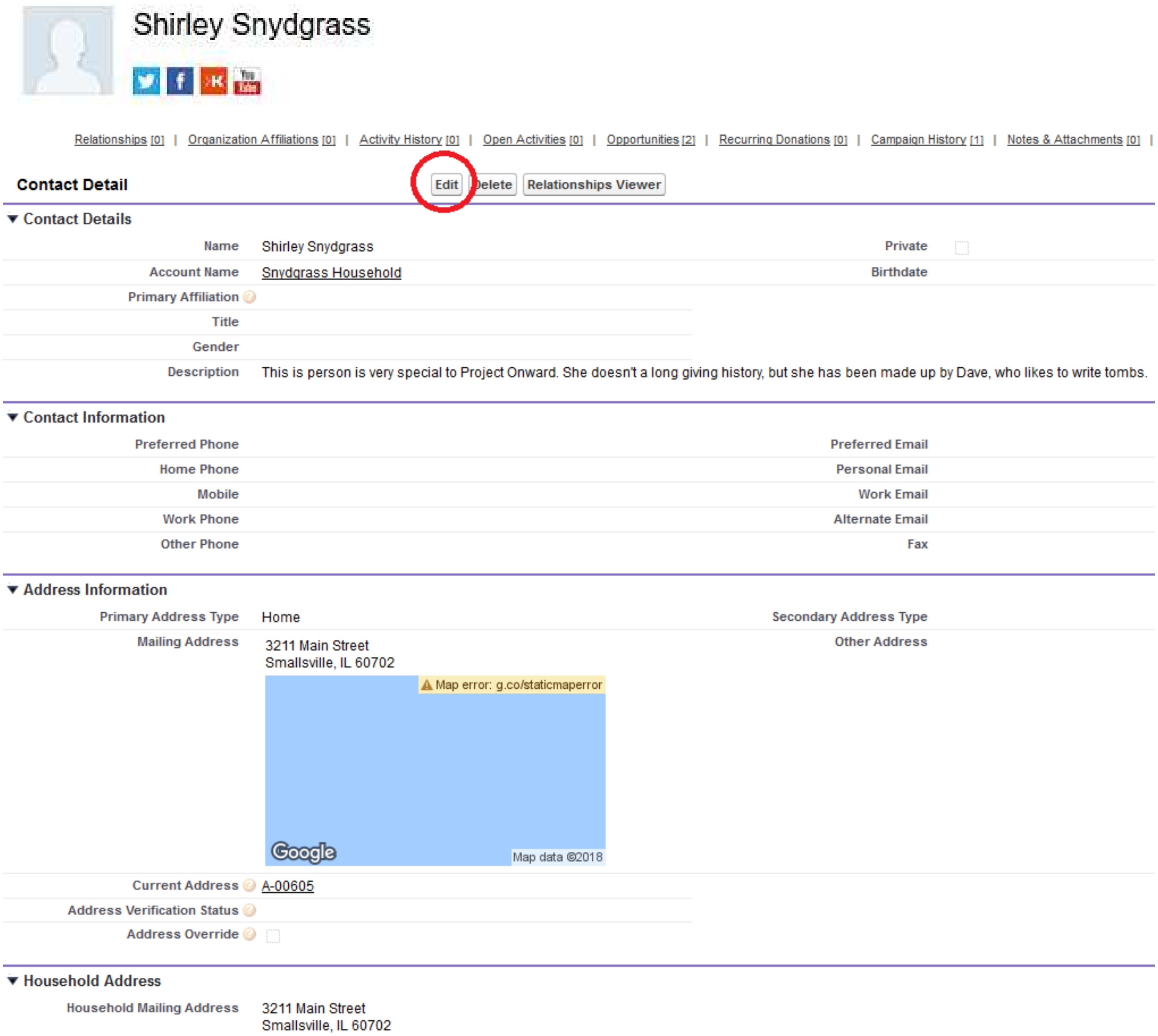
If you want to look at a specific *Contact* record, use the *Search*, as described above. However, **if you want to look at a list of contact records, click on "*Contacts*" on the menu (red circle).**

You can quickly organize the list of Contacts by using the drop-downs on each side, at the top of the screen (**red** arrows).

Note that this screen is only a very partial listing of Contacts. To see the whole list, you need to use the Reports function, which is covered later in this training module.

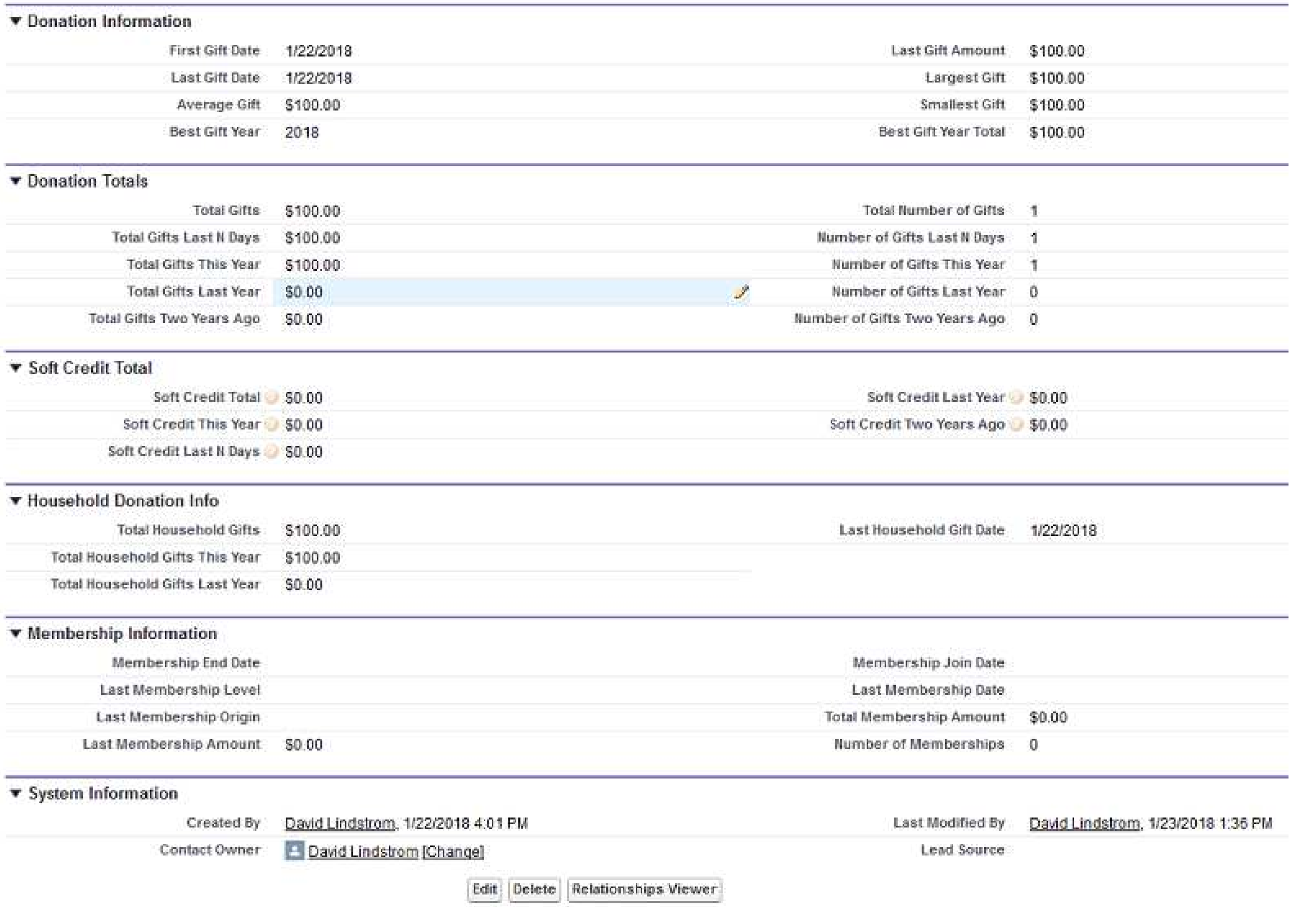
Click on any link to get to the Contact detail record.

1.2.1 Contact Detail record



As shown above, the Contact Detail record contains everything that we know about a *Contact*, including any history of giving, buying art, etc. It may be easily updated by clicking the "***Edit***" button (**red** circle), for instance to add a phone number, change the address, update the description, etc. ***Updating records will be covered in another training module.***

Note the map: Because I made-up this address, the map is broken. Otherwise, it would show the location of the address.



▼ Donation Information

First Gift Date	1/22/2018	Last Gift Amount	$100.00
Last Gift Date	1/22/2018	Largest Gift	$100.00
Average Gift	$100.00	Smallest Gift	$100.00
Best Gift Year	2018	Best Gift Year Total	$100.00

▼ Donation Totals

Total Gifts	$100.00	Total Number of Gifts	1
Total Gifts Last N Days	$100.00	Number of Gifts Last N Days	1
Total Gifts This Year	$100.00	Number of Gifts This Year	1
Total Gifts Last Year	$0.00	Number of Gifts Last Year	0
Total Gifts Two Years Ago	$0.00	Number of Gifts Two Years Ago	0

▼ Soft Credit Total

Soft Credit Total	$0.00	Soft Credit Last Year	$0.00
Soft Credit This Year	$0.00	Soft Credit Two Years Ago	$0.00
Soft Credit Last N Days	$0.00		

▼ Household Donation Info

Total Household Gifts	$100.00	Last Household Gift Date	1/22/2018
Total Household Gifts This Year	$100.00		
Total Household Gifts Last Year	$0.00		

▼ Membership Information

Membership End Date		Membership Join Date	
Last Membership Level		Last Membership Date	
Last Membership Origin		Total Membership Amount	$0.00
Last Membership Amount	$0.00	Number of Memberships	0

▼ System Information

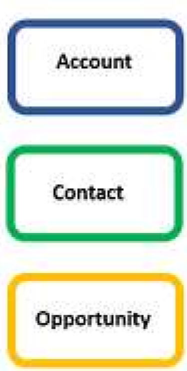
Created By	David Lindstrom, 1/22/2018 4:01 PM	Last Modified By	David Lindstrom, 1/23/2018 1:36 PM
Contact Owner	David Lindstrom [Change]	Lead Source	

Edit | Delete | Relationships Viewer

As pictured above, **if I scroll-down on the Contact Detail record, I see a summary of different aspects of the Contact's History, including Donation information** (for both the Contact and the Household – i.e. totals for the entire Household.)

By default, Salesforce lets you update this information. But it is best NOT to make updates. These totals are calculated every night by Salesforce and overwritten. The totals are based on information from Opportunity records.

1.2.2 Opportunities for the Contact



Account – A grouping of one or more people, together for a common purpose. Example: Company, Business, Organization, Household, etc.

Contact – A person of interest, associated with a Household and possibly affiliated with a company or organization.

Opportunity – A revenue transition (money coming-in) that you want to manage.

Remember that Opportunities can be Donations, Grants, Art Sales, Event Tickets, etc. They can be accessed from a Contact record.

As pictured above, if I scroll-down EVEN FURTHER on the *Contact Detail* record, I see sections that come from other records, and which are linked to this *Contact* record. The section that we often scroll-to, is ***Opportunities***. Each line that shows is a linked *Opportunity* record for this *Contact*.

I can either click the ***black*** Opportunity record link (under "Opportunity Name"), to ***view*** the Opportunity record, or I can directly *Edit* the Opportunity if I need to update it. (This will be covered in another training module).

1.2.2.1 More Opportunities?

Note that ONLY A FEW Opportunities show on the Contact record.

Opportunities | New Opportunity

Action	Opportunity Name
Edit | Del	Maureen McCabe $30 Art Sales 07/17/2015
Edit | Del	Maureen McCabe $20 Art Sales 08/21/2015
Edit | Del	Maureen McCabe $25 Art Sales 08/29/2015
Edit | Del	Maureen McCabe $120 Art Sales 11/17/2015
Edit | Del	Maureen McCabe $20 Art Sales 08/21/2015

Show 5 more » | Go to list (36) »

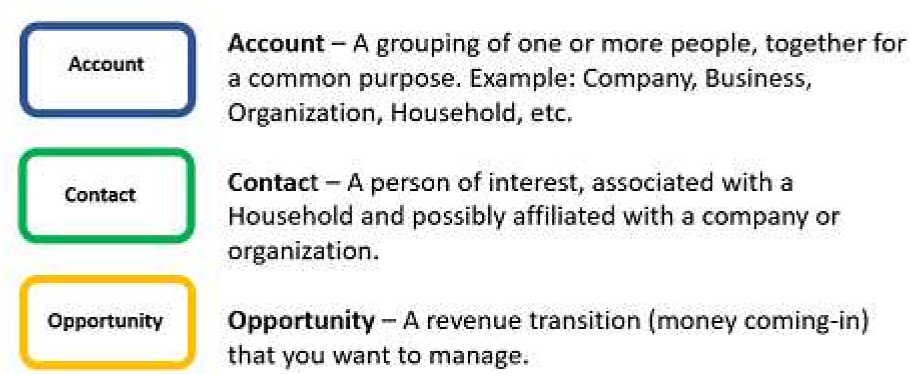
Only 5 Opportunities show. And, these may not be the most recent ones. As in the example above, from a different *Contact*, **if there are more than 5 Opportunities, there will be a link to see more, or the complete list (red arrow above).**

Opportunities
David Lindstrom
Contact: David Lindstrom

Action	Opportunity Name	Stage
Edit | Del	David Lindstrom $50 Donation 11/27/2017	Posted
Edit | Del	David Lindstrom $10 Donation 09/27/2017	Posted
Edit | Del	David Lindstrom $10 Donation 09/27/2017 I heART 2017 Campaign	Posted
Edit | Del	David Lindstrom $10 Donation 06/07/2017 Celebrate Kim Jacob's 50th Birthday	Posted
Edit | Del	David Lindstrom $10 Donation 06/07/2017 Endangered Buildings - Places that Matter - Aug. 4	Posted
Edit | Del	David Lindstrom $150 Event Tickets 06/07/2017 Endangered Buildings - Places that Matter - Aug. 4	Posted
Edit | Del	Maureen McCabe $275 Art Sales 04/20/2017	Posted
Edit | Del	Maureen McCabe $15 Art Sales 04/06/2017	Posted

Now all the *Opportunities* show, ordered with the latest ones at the top. Note that the list includes all *Opportunities* for the *Household*.

1.3 HOUSEHOLD ACCOUNT RECORDS



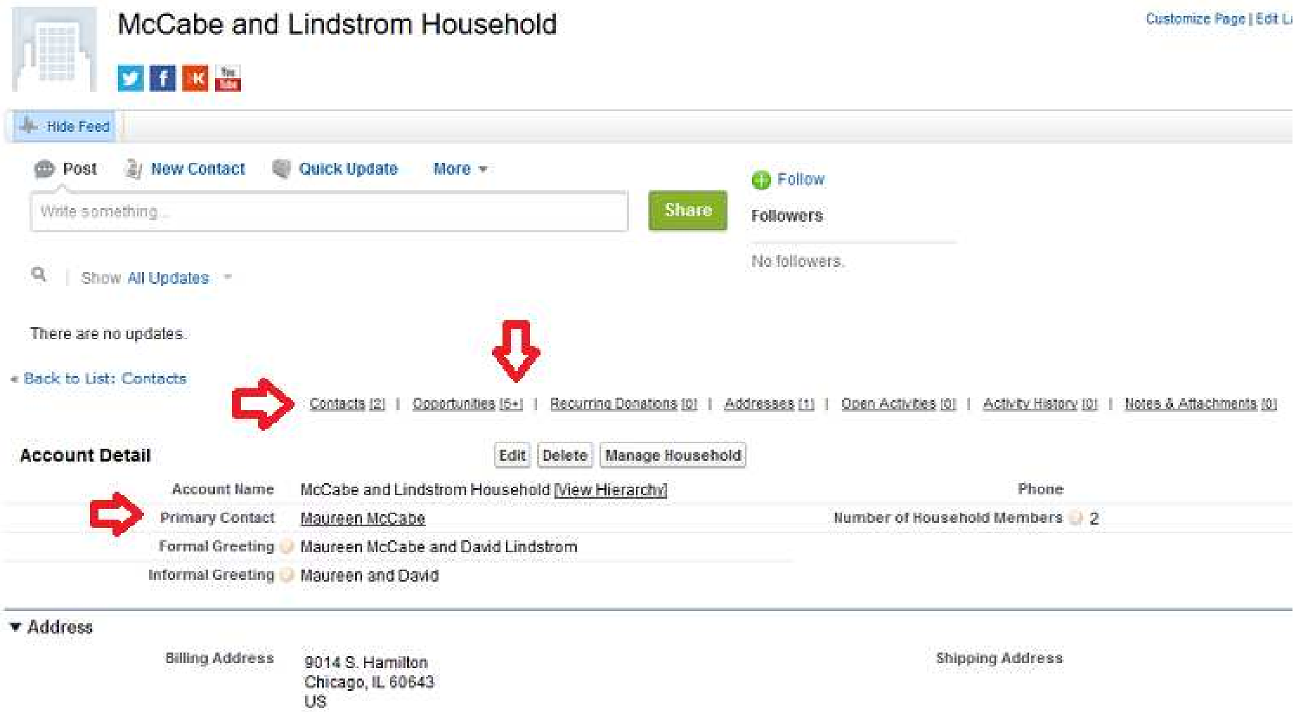
Every *Contact* is part of a *Household*, and has a Household record. Remember that a *Household* is a type of Account. The other type of *Account* record is *Organization*.

A *Household* record is *__automatically__* created by Salesforce when you create a *Contact*.

A *Household* record is *__automatically__* deleted when there are no more *Contacts* associated with it.

1.3.1 Household Detail records from the Contact record

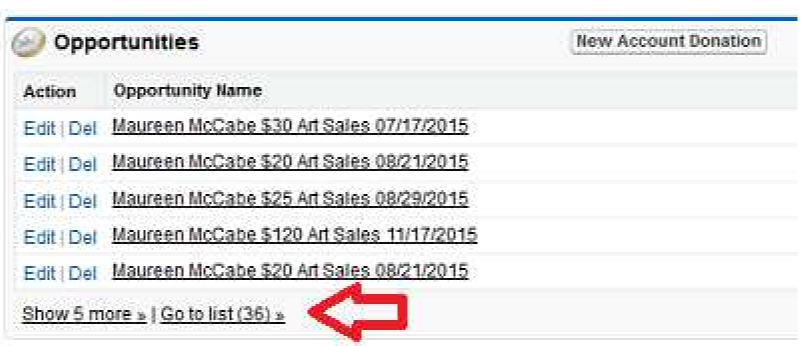
As shown above (red arrow), a Contact's *Household* can be accessed from the *Contact Detail* record. Click on the link to access the Household record.



Some things to note on the Household record, above:

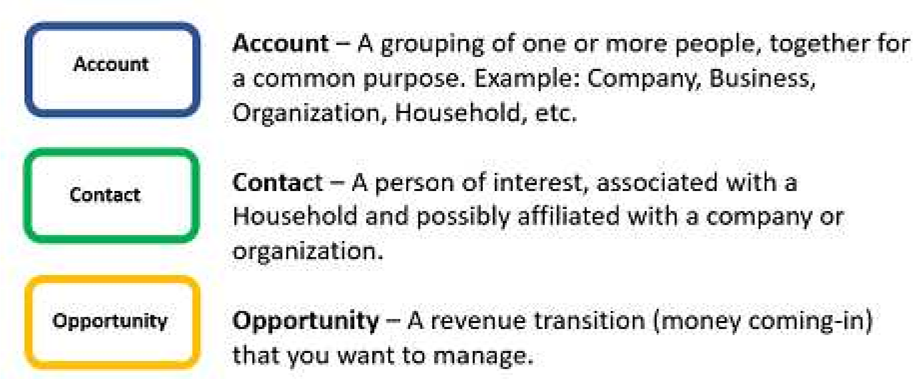
- I can directly Edit the Household record, using the "Edit" button (**red** arrow on the right).
- The *Primary Contact* is Maureen (lower **red** arrow). This means that any Opportunity created from this Household record will be "Soft-Credited" to Maureen.
- If I put my mouse over the row of links across the top (upper **red** arrow), I will see more detail with links. For instance, I can quickly see all the *Contacts* in the *Household* (and click a link to get to a particular *Contact Detail* record, if I want to.)
- The address in the Household record will apply to each Contact, unless a different address shows on a Contact record.
- I can scroll-down to see a summary of History (with totals for the Household) and Opportunity record links, like I can on a Contact record.

1.3.2 Opportunities for the Household



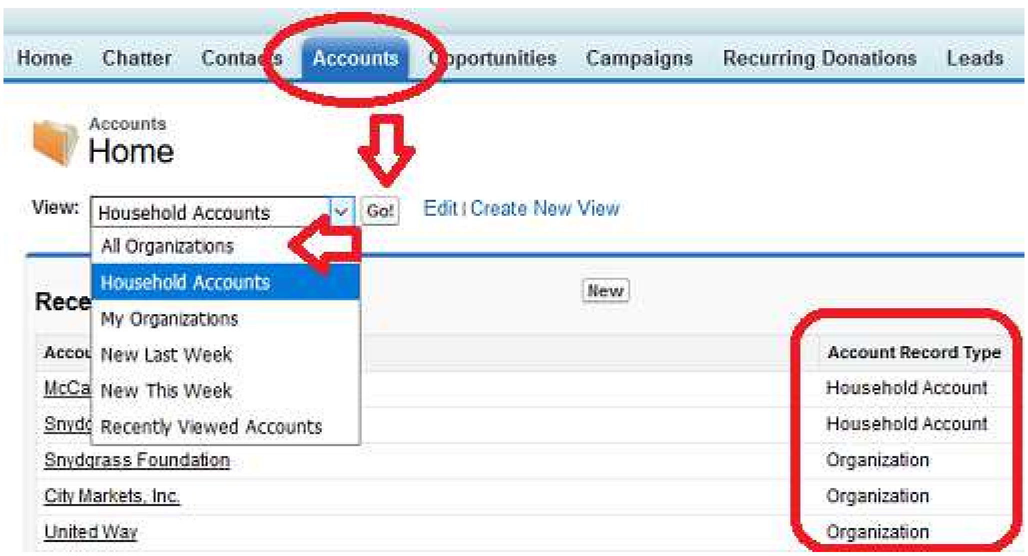
As shown above, **by scrolling-down to the Opportunities section, on the Household Detail record, I see the Opportunities related to the Household**. Like on a Contact record, if there are more than 5 Opportunities, there will be a link to see the complete list (**red** arrow above).

1.4 ORGANIZATION ACCOUNT RECORDS



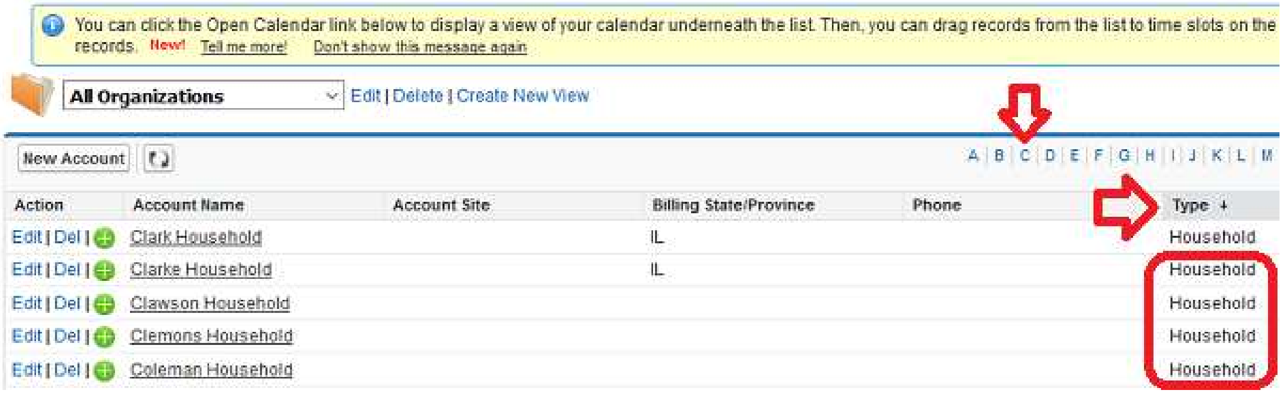
Organization is a type of Account record. (The other type of Account record is Household.)

Organization Accounts do NOT have to have **Contacts.** But an **Organization** can be **affiliated** with **Contacts**.



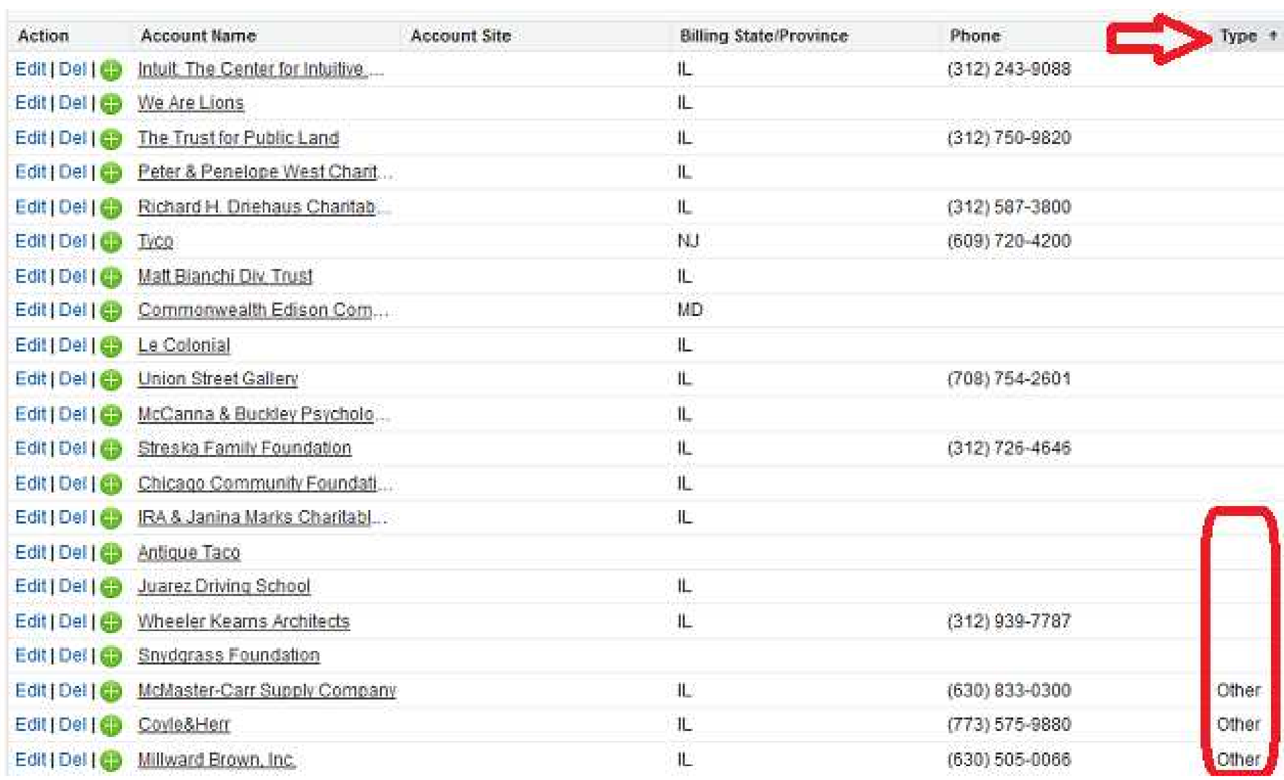
You can either use Search to find an Organization Account record (as described at the beginning of this training module), or you can **click on *Accounts* in the menu** (**red** circle above).

Notice that, by default, both Household and Organization account records show in the list (**red** box on right). **You can click on the arrow for the drop-down on the left and filter the view to "All Organizations" and click the "Go" button (red arrows).**



Above is the complete list of Accounts

(At the bottom of the screen are links to go through the entire list (as shown below, **red** circle):

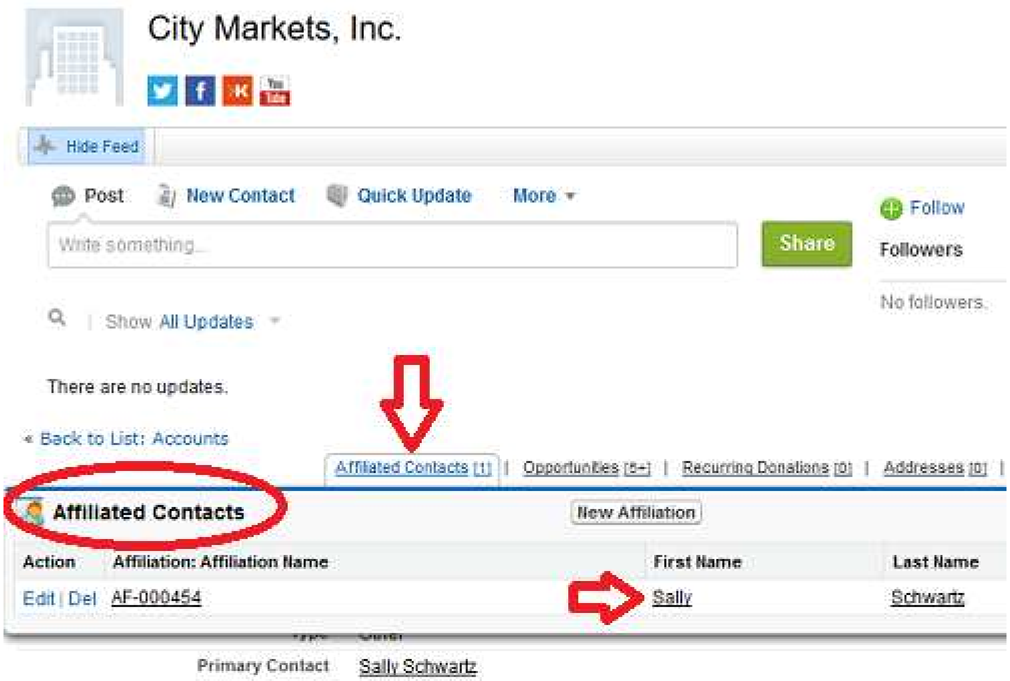


As shown above, you can quickly bring all the Organization accounts to the top of the list by clicking on the black heading, "***Type***" (**red** arrow on right). Or, you can go directly to a section of the list by clicking on a letter at the top (**red** arrow, top).

Note that, as shown in the red circle on the right, *Organization* accounts (as opposed to Households) show a blank, or the word, "*Other*" in the column (instead of "Household.")

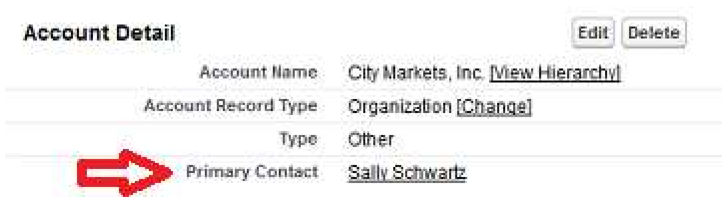
Click on the appropriate link to either **view (black)** or Edit (blue) an Organization account Detail record.

1.4.1 Organizations can be affiliated with Contacts



In the above ***Organization Account*** Detail record, I put my mouse over the "*Affiliated Contacts*" link (top red arrow). A pop-up for "Affiliated Contacts" shows that Sally Schwartz is the Contact affiliated with the *City Markets* organization.

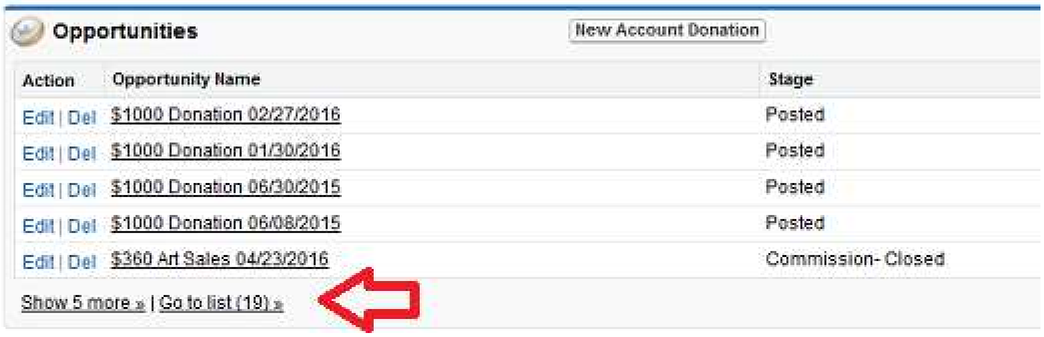
1.4.2 Organizations can also have a Primary Contact



As seen above, the Primary Contact for City Markets is Sally Schwartz (red arrow above).

1.4.3 Opportunities by Organizations

Organizations might give Grants or Donations, or they might also buy Art.



Opportunities New Account Donation

Action	Opportunity Name	Stage
Edit | Del	$1000 Donation 02/27/2016	Posted
Edit | Del	$1000 Donation 01/30/2016	Posted
Edit | Del	$1000 Donation 06/30/2015	Posted
Edit | Del	$1000 Donation 06/08/2015	Posted
Edit | Del	$360 Art Sales 04/23/2016	Commission- Closed

Show 5 more » | Go to list (19) »

As shown above, on an ***Organization Account*** Detail Record, I can scroll-down to the ***Opportunities section*** to see the Opportunities related to this organization. Just like on other Detail records, if there are more than 5 Opportunities, there will be a link to go to the complete list (**red** arrow above).

1.4.4 Primary or Affiliated Contacts for Organizations do NOT get have Soft-Credits

▼ Donation Information

First Gift Date	6/8/2015	Last Gift Amount	$1,000.00
Last Gift Date	12/2/2017	Largest Gift	$1,000.00
Average Gift	$1,000.00	Smallest Gift	$1,000.00
Best Gift Year	2016	Best Gift Year Total	$6,000.00

▼ Donation Totals

Total Gifts	$18,000.00	Total Number of Gifts	18
Total Gifts Last N Days	$8,000.00	Number of Gifts Last N Days	8
Total Gifts This Year	$6,000.00	Number of Gifts This Year	6
Total Gifts Last Year	$6,000.00	Number of Gifts Last Year	6
Total Gifts Two Years Ago	$6,000.00	Number of Gifts Two Years Ago	6

As shown above, on an ***Organization Detail*** record, I can scroll-down to see the *Donation* history. Note that donations from *Contacts* (either *Affiliated Contacts* or the *Primary Contacts*) have NO association with the Organization, and are not part of the totals (through *Soft-Credit* links), as they are on *Households*.

For a further explanation, see:

https://powerofus.force.com/articles/Resource/Primary-Contact-vs-Primary-Affiliation

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1.5 Salesforce Reports

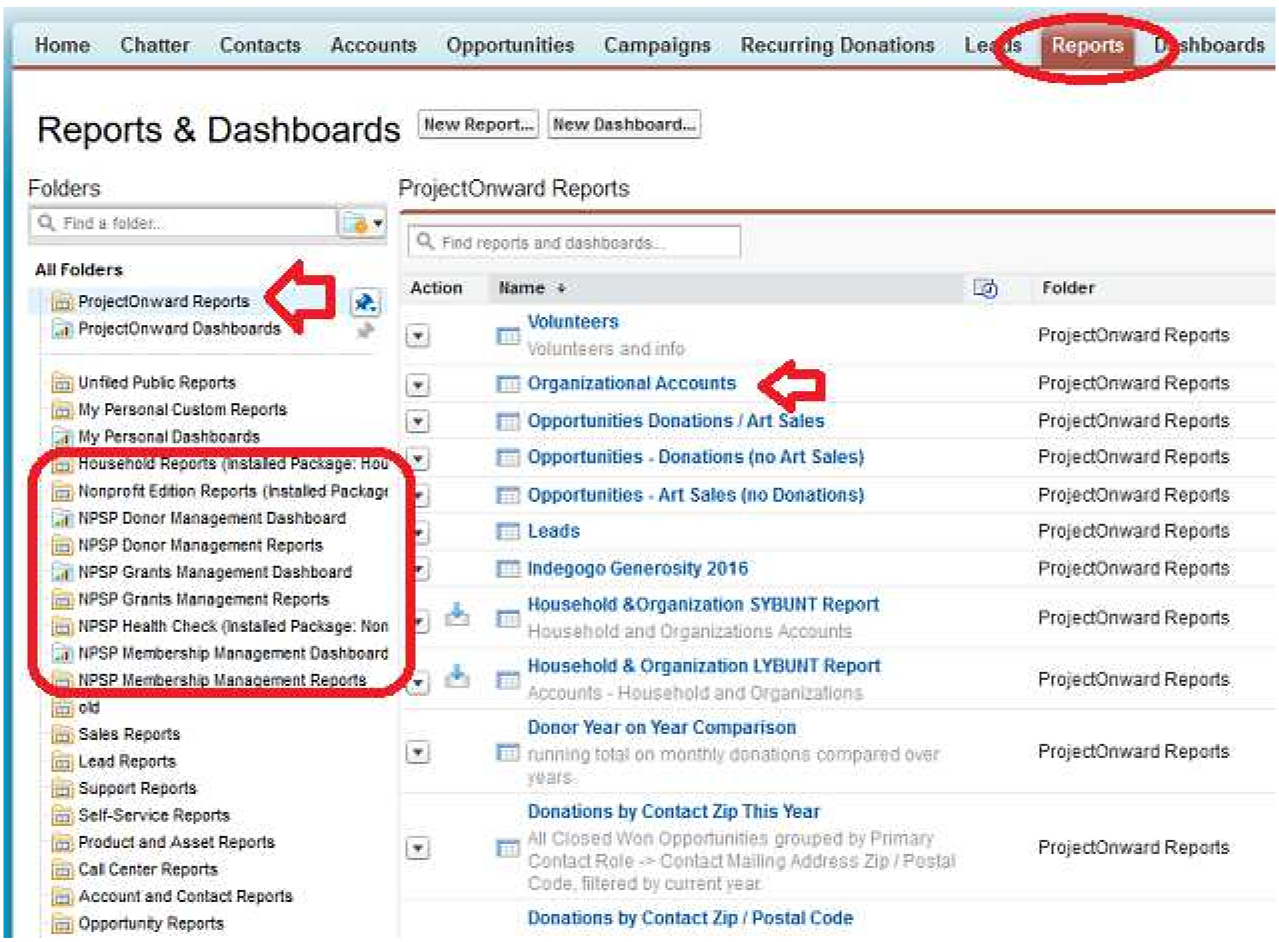
Getting information from Salesforce, beyond individual records, is done through Reports and Dashboards.

Salesforce has hundreds of already-built reports, as well as a number of dashboards that can be used, out of the box.

Likewise, many reports have been customized and/or built from scratch for Project Onward.

Salesforce also has a Report-Building and Customizing environment, so that new reports can be tailored and/or built from scratch for Project Onward needs.

1.5.1 Already-Built and/or Customized Reports



As shown above, click on *Reports* on the menu (red circle, top right).

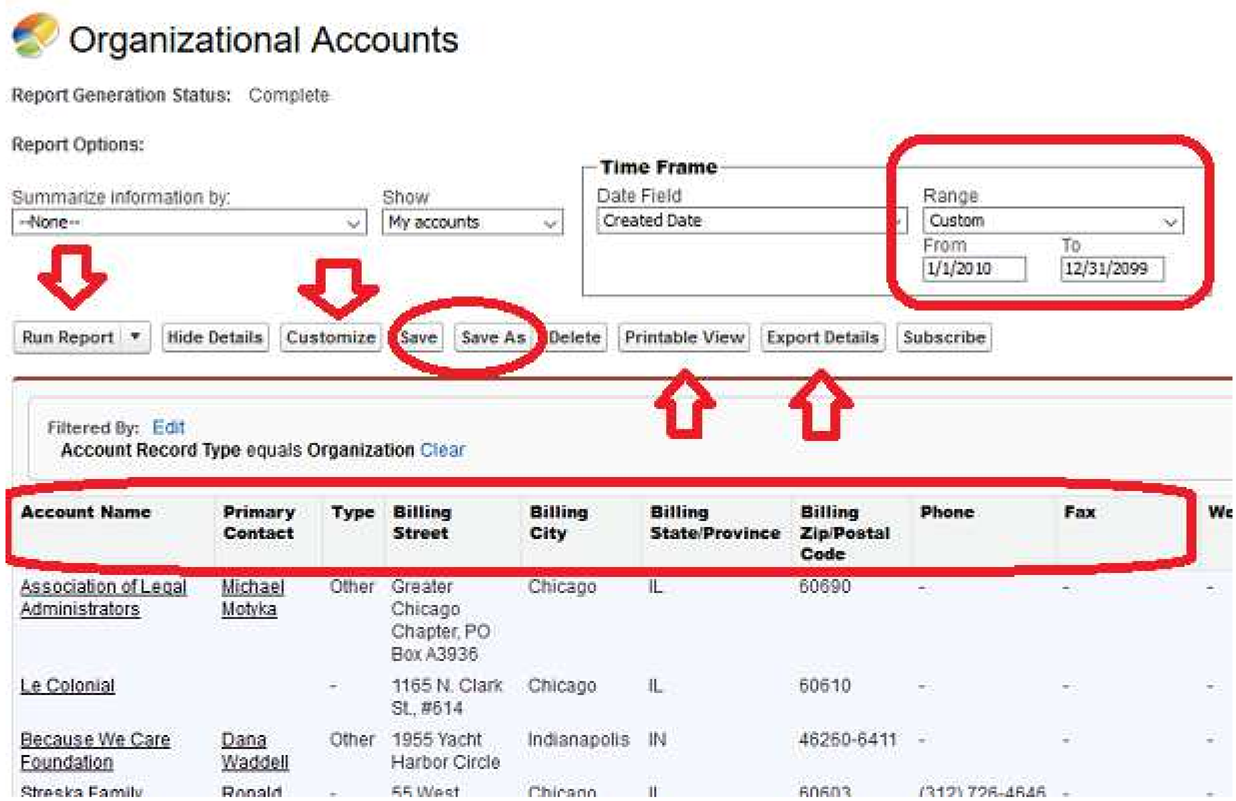
On the left are folders of various kinds of reports. Many reports are not applicable to Project Onward. The many of the folders in the red box on the left (especially those labeled, "NPSP…") are for nonprofits. The folder for "Households…" applies to an earlier version of the Salesforce Data model, and can't be used in the current version.

The bottom line: The current set of working reports, (many of which were pulled from NPSP folders), as well as those that have been customized for use at Project Onward are in the "*ProjectOnward Reports*" folder (red arrow left).

On the right (above) are some of the reports in the *ProjectOnward Reports* folder.

Click on the "*Organizational Accounts*" report (red arrow right).

1.5.2 Organizational Accounts Report Example

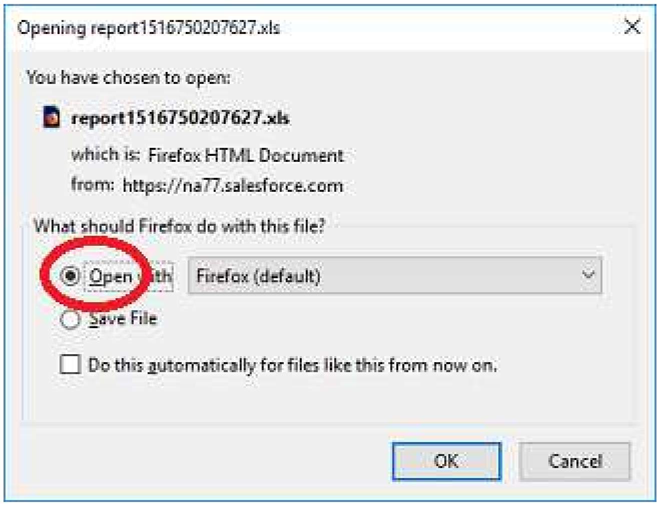


As shown above, this report has been customized to show all Organization Account records. The columns show fields from those records:

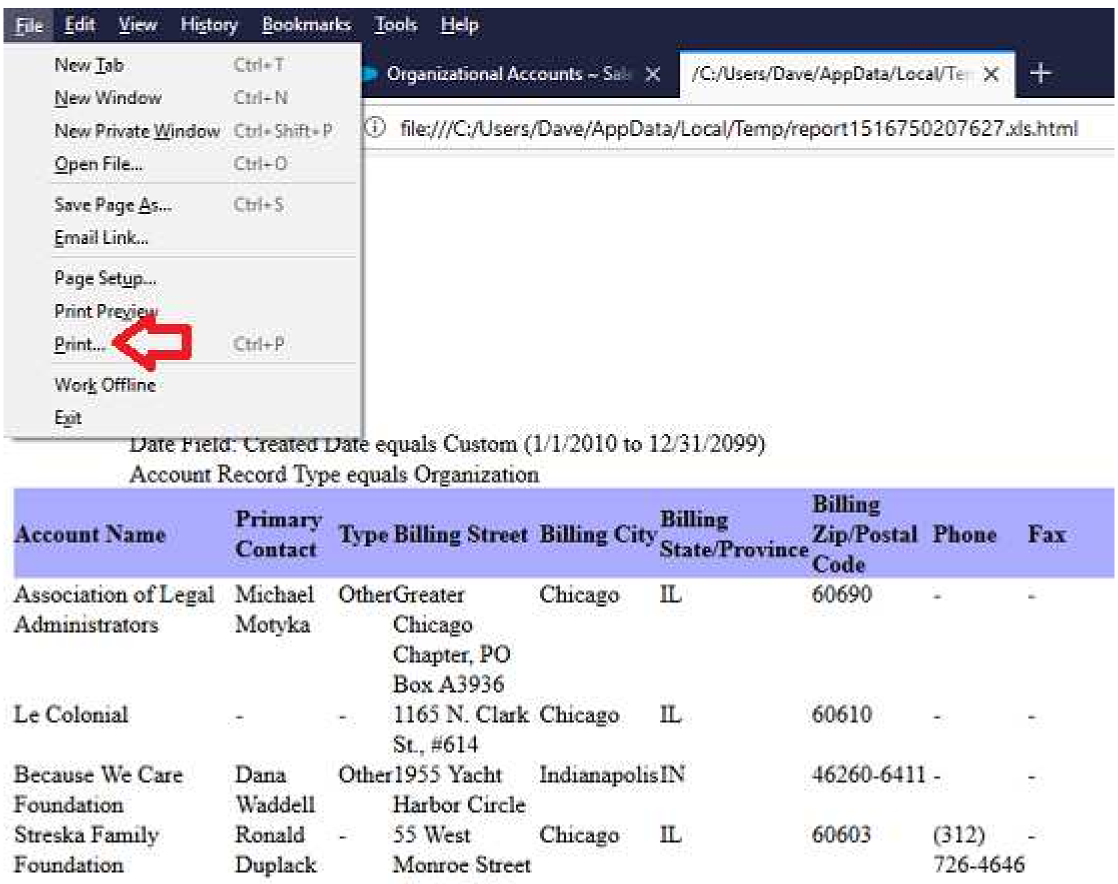
- Note the date range (red circle top right). You can change this, and click "*Run Report*" (**red** arrow) to update it for a specific Date Range.
- You can click on any black column heading to sort all the records by that column (red circle bottom). (Click again, and it reverses the sort.)
- You can also customize the report by clicking the "Customize" button (**red** arrow), which will be shown further on in this training.

Note that, for huge reports, all the records (and/or totals at the bottom of a report) may or may not show in the screens, or show with complete accuracy). **For a complete listing, with accurate totals, click either the "*Printable View*" button (red arrow) or the "*Export Details*" (red arrow) button.**

1.5.2.1 Printable View



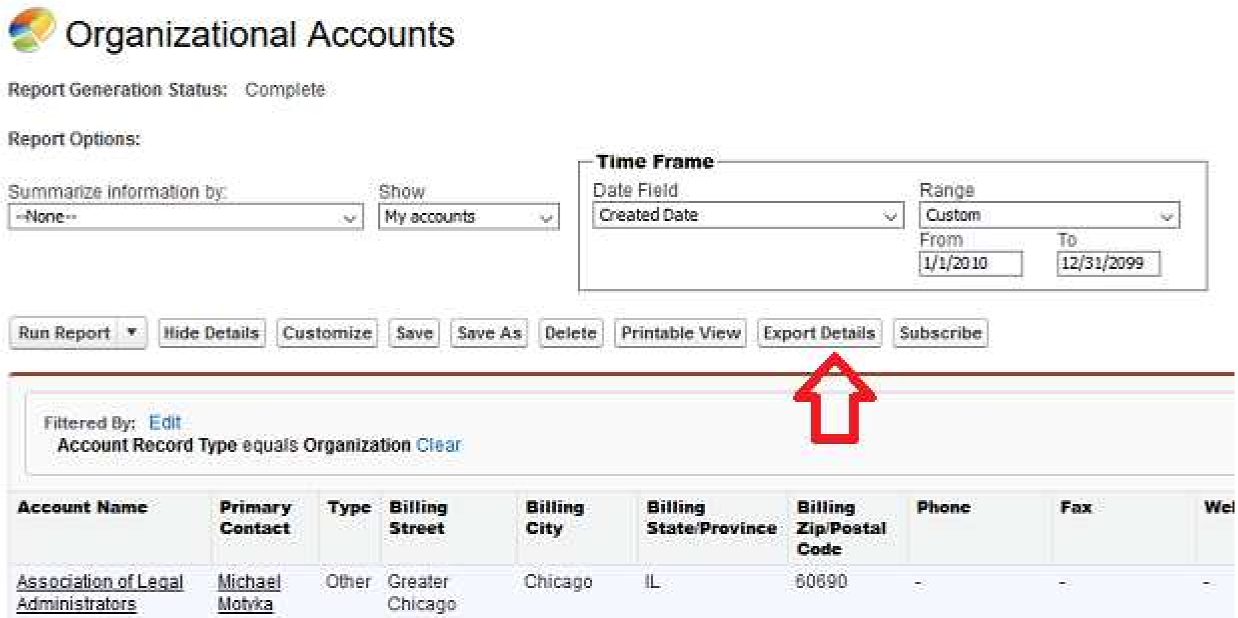
When you click the “Printable View” button (as shown in the previous section), **select “Open” (red circle above) to have the report come up in your computer’s default browser.**



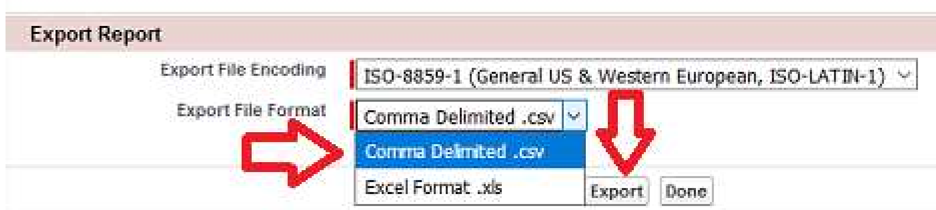
Account Name	Primary Contact	Type	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code	Phone	Fax
Association of Legal Administrators	Michael Motyka	Other	Greater Chicago Chapter, PO Box A3936	Chicago	IL	60690	-	-
Le Colonial	-	-	1165 N. Clark St., #614	Chicago	IL	60610	-	-
Because We Care Foundation	Dana Waddell	Other	1955 Yacht Harbor Circle	Indianapolis	IN	46260-6411	-	-
Streska Family Foundation	Ronald Duplack	-	55 West Monroe Street Suite 3625	Chicago	IL	60603	(312) 726-4646	-

The report won’t be pretty, but it will be complete. **You can print it from your browser by choosing “File,” then “Print” (red arrow above) in your browser menu.**

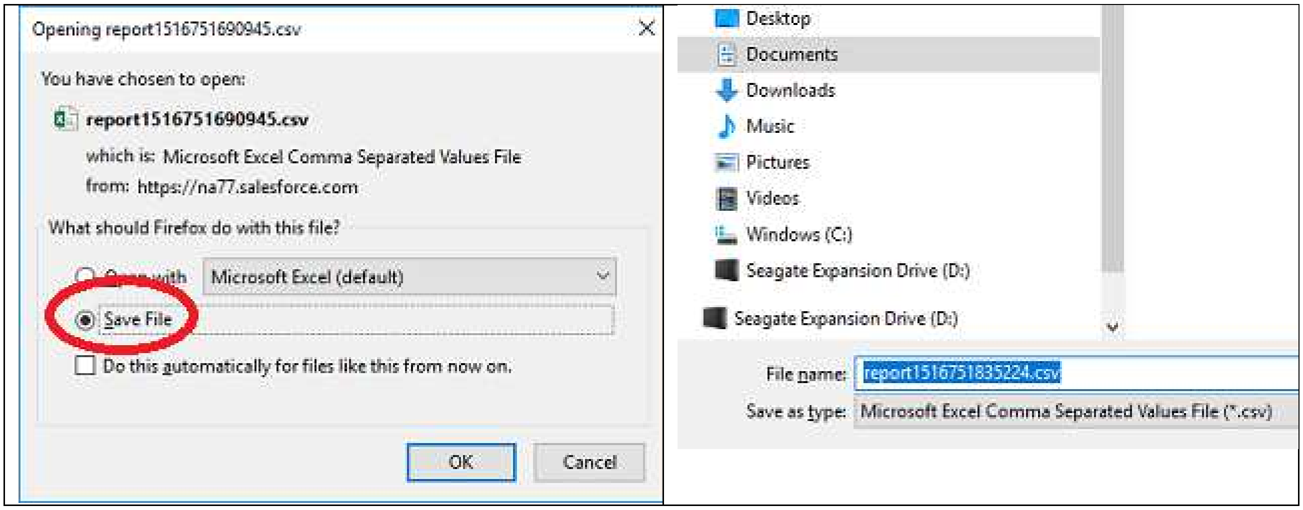
1.5.2.2 Download to Your Spreadsheet Program (like MS Excel)



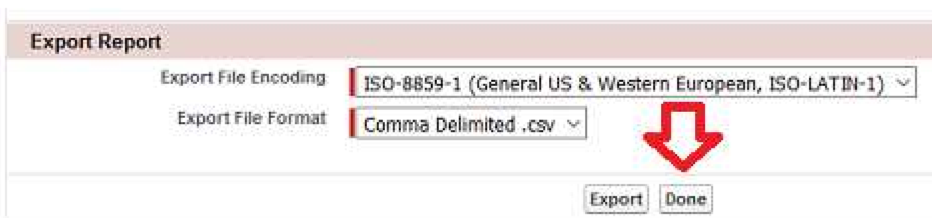
Those who know how to use a Spreadsheet program, such as Microsoft Excel, will find a much more usable form of Report Printout. **Click on the "*Export Details*" button (red arrow above).**



You are presented with the choice of exporting as a "comma separated values" file or an .xls file (which is the old format for MS Excel). **I usually choose ".csv,"** (**red** arrow above) to keep it as simple as possible, with no formatting insertions – I will format it myself. **Then I click the "*Export*" button (red arrow above).**



This time, I will *Save* the file (red circle above) to a place on my computer or thumb drive, where I can open it in my Spreadsheet program (like MS Excel) and format it.



And I can now click on the "Done" button to get out of the "*Export Report*" dialog (red arrow above).
