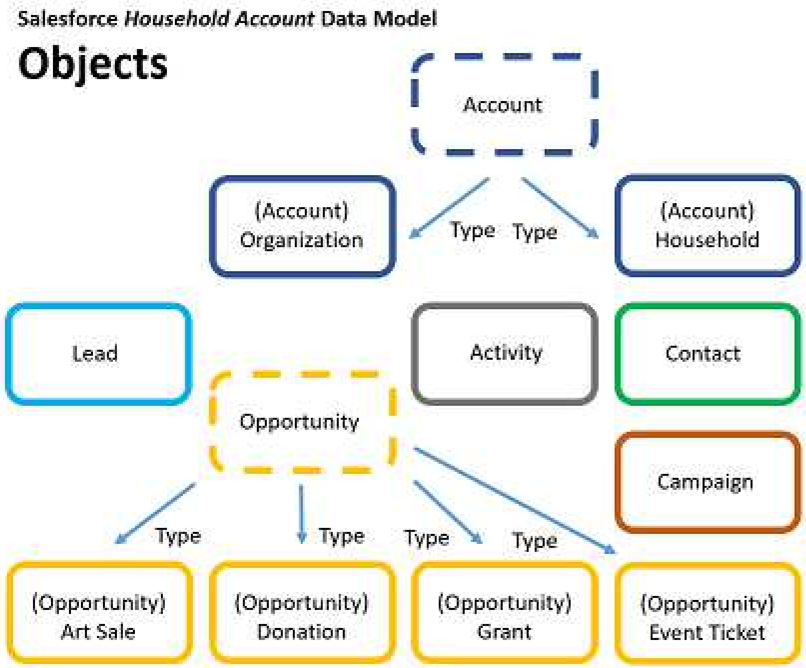
Salesforce Entry / Update

Or

Is it Time for Lunch Yet?

CONTENTS

1 THE HOUSEHOLD ACCOUNT DATA MODEL



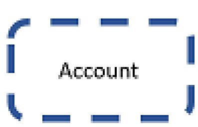
The above picture is another view of the ***Household Account Data Model*** which we use in the Project Onward customization of Salesforce. ***Understanding the Data Model greatly helps you understand the Salesforce screens.***

Information is grouped within Objects.

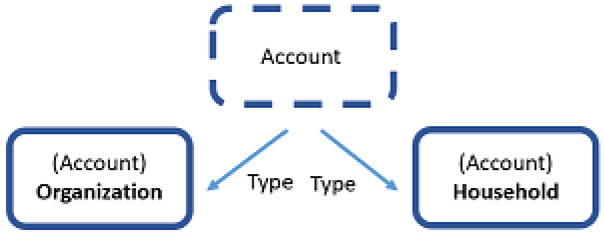
1.1 ACCOUNT AND CONTACT OBJECTS

It is fairly easy to get lost in the Salesforce screens. But **a basic understanding of the Data Model will help you to get around in Salesforce.**

1.1.1 Account Objects (Organization or Household)



As pictured above, **the basic object in Salesforce is *Account***. Everything of interest in Salesforce is related to an *Account*.



As pictured above, an *Account* will be one of two possible **types**:

- **Organization** – A legal entity for a particular purpose (example: company, business, foundation, etc.)
- **Household** – A geographic proximity for one or more people.

1.1.2 Contact objects (associated to Household account)

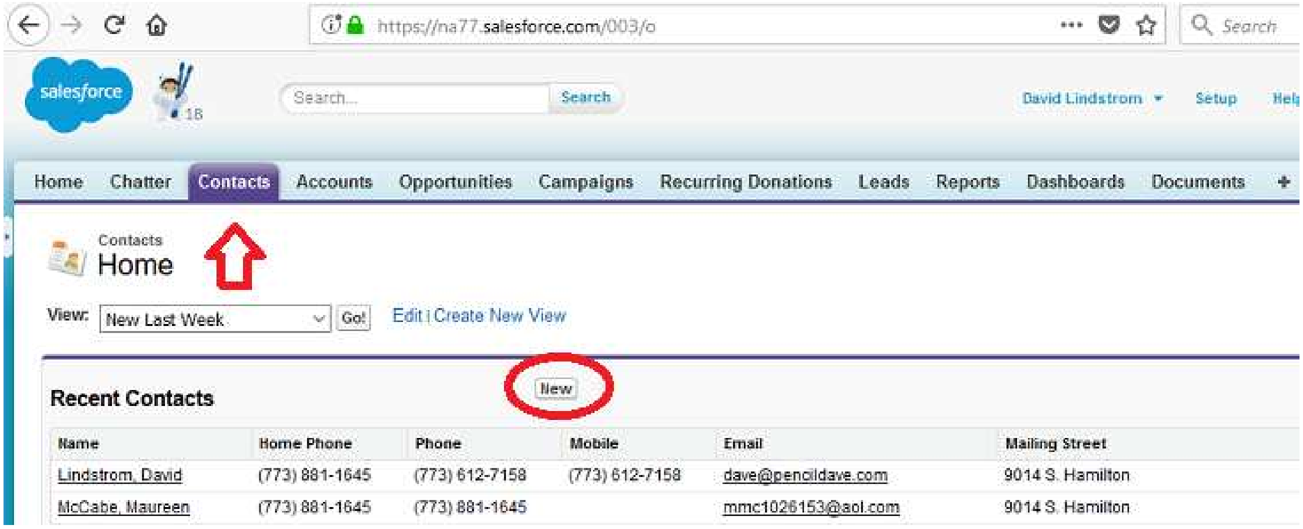
As pictured above, another object is called *Contact*:

Contact – A person of interest. This is a person who has most likely had some contact with Project Onward, and who we want to gather some contact information, in some way. (Example: Visitor, Donor, Gift Buyer, Art Buyer, Person on Email List, etc.)

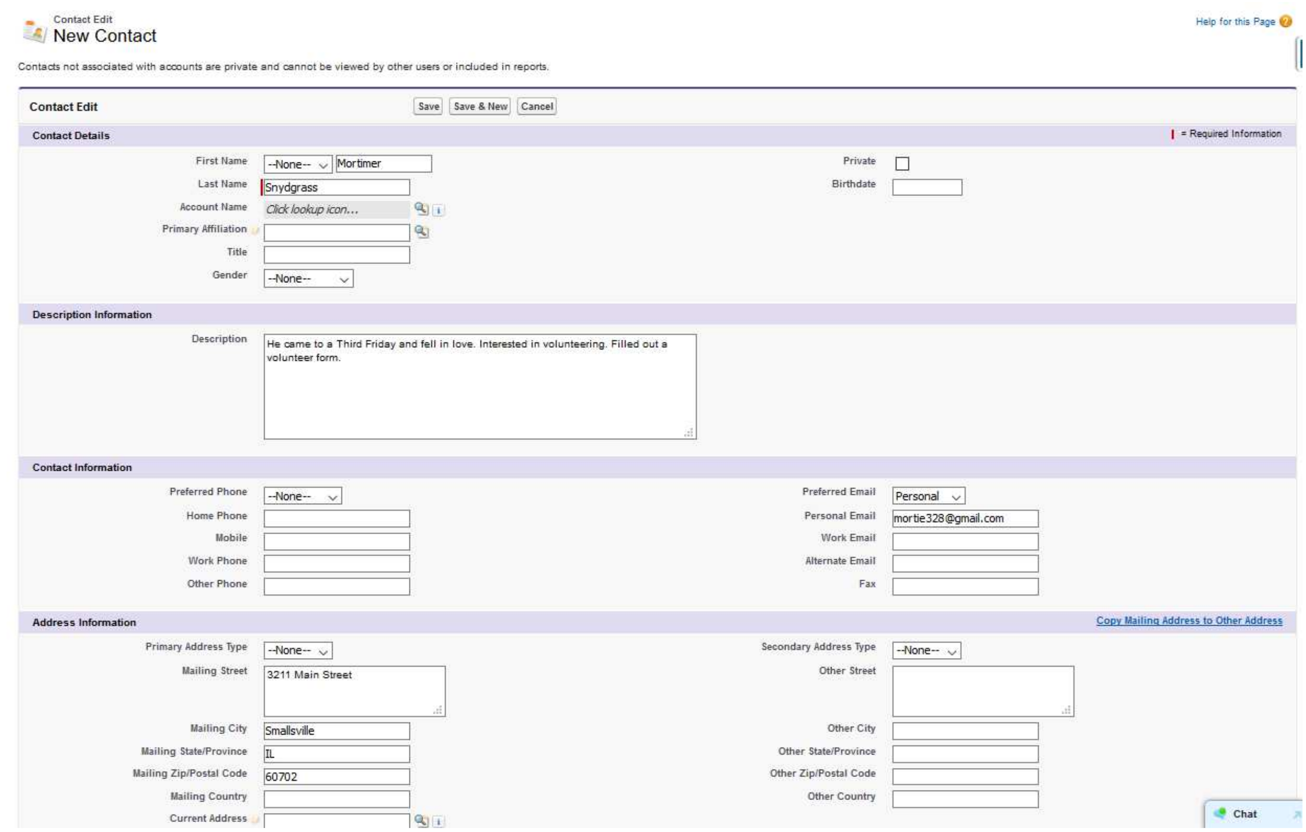
A Contact is always related to a Household:

As pictured above, when you create a Contact in Salesforce, a Household Account object is <u>automatically</u> created by Salesforce. ***You do NOT have to create Household objects.***

1.1.3 Creating a New Contact in Salesforce



In the menu, click on Contacts. Then click on the "New" button (as pictured above).



As pictured above, fill-in the information that you know. To keep to the conventions that we use at Project Onward, **keep the following in mind:**

First Name and Last Name – Very important. You cannot establish a Contact in Salesforce without at least a Last name.

- If there is a middle initial, don't put it in unless it is really needed.
- Some people put an initial for their first name, then use their middle name in full. In that case, put these in the First Name field. (Normally, we don't track middle initial at Project Onward.)
- If the First Name is two names, try to hyphenate them in the First Name field (i.e. no space in-between).

Account Name – Leave blank. The Account object (Household) will be created automatically.

Primary affiliation – Leave blank, for now. You can always update it later, if you need.

Title – Leave blank. We don't track it at Project Onward.

Gender – Leave blank. We don't track it at Project Onward.

Description – Fill-in any information that might be relevant. Think about what anyone might want to know, in future contacts with this person.

Phone (if known):

- At Project Onward, we put the phone number that we want to use in the "Home Phone" field (even if it is obviously a Work phone number.)
- Make sure you indicate "Personal" in the drop-down for "Preferred Email."
- Leave "Work Phone" blank.
- If there is a second phone number for the person, put that in "Other Phone."

Email (if known):

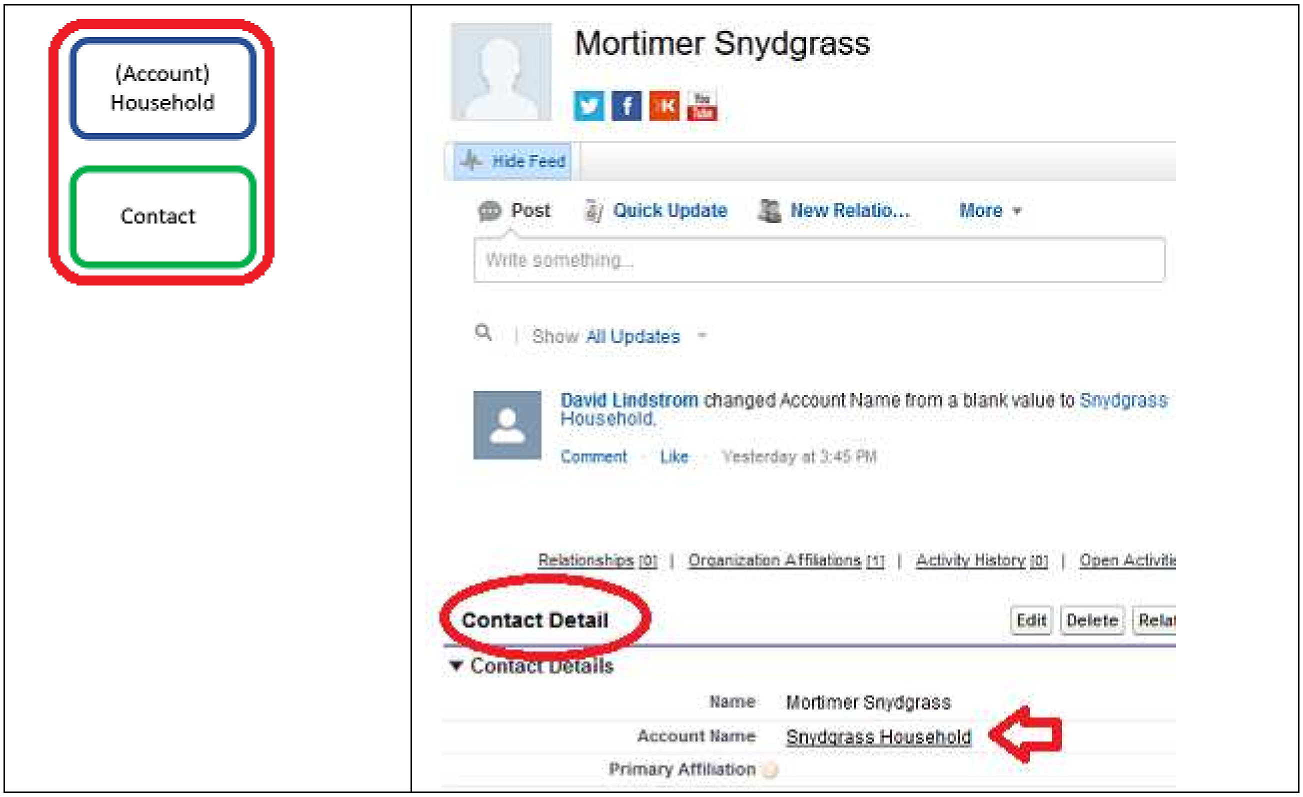
- At Project Onward, we put the email address that we want to use in the "Personal Email" field (even if it is obviously a Work email.)
- Make sure you indicate "Personal" in the drop-down for "Preferred Phone."
- Leave "Work Email" blank.
- If there is a second email for the person, put that in "Alternate Email."

Address Information (if known):

- Primary Address Type – Leave as "None."
- Mailing Street – For multiple line addresses, put the first and second (even third) line of an address here, separated by commas (example: "123 Main St., Building 2, Apt. 3").
- Mailing City, State, Zip – Fill-in
- Mailing Country – fill-in "US" or code for other country

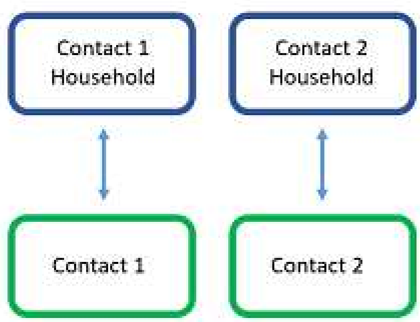
When done filling-in the information, click on the "Save" button at the top or bottom of the screen (as pictured above).

1.1.3.1 Notice that it automatically created a Household object



Now that the Contact is created, notice that a Household account object was also created, and linked to the Contact (**red** arrow above). **You can click on the link if you want to go to the Household object.**

1.1.4 Multiple Contacts in a Household



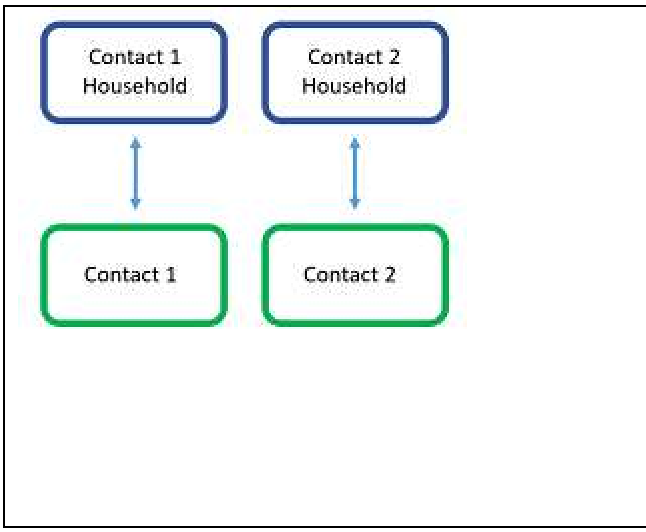
If there are two people I want to show in the same Household, I first create each Contact object (as above). Salesforce automatically creates a Household object for each.

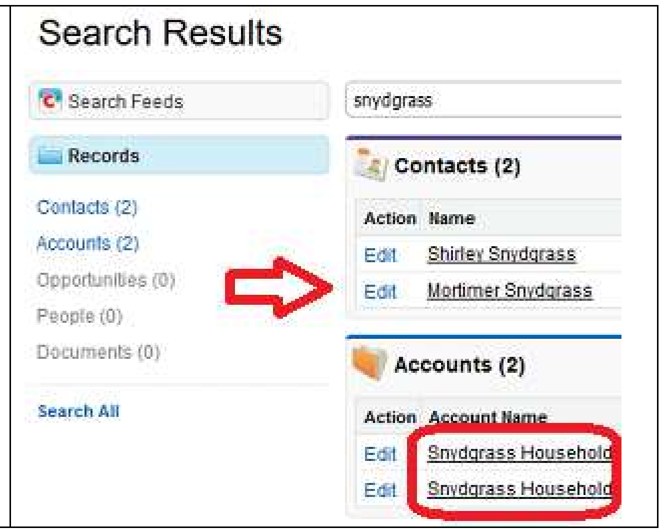
1.1.4.1 Here, we create the second Contact

Creating Contact *Created Contact and Household*

Note that, when I create a contact that will be in an already-established Household, **I don't need to put-in all the common details, like address information.** Only things that might be unique for this contact (like Email address).

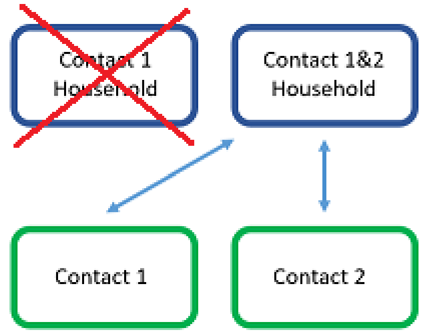
1.1.4.2 There are now two Households as well as Contacts



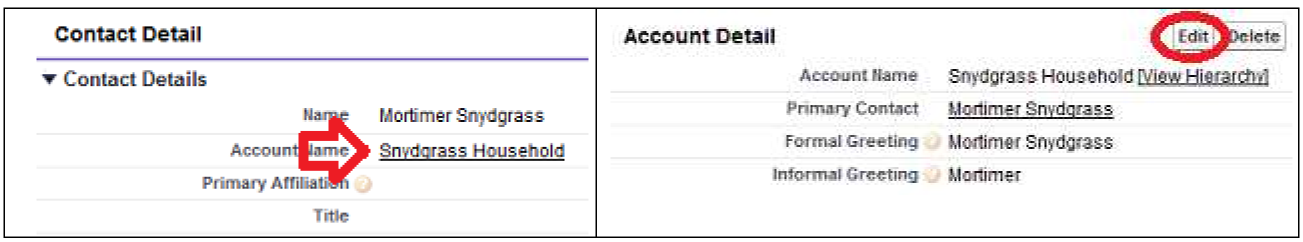


As pictured above, notice that there are two Household objects with the same name (one for each contact). **Household objects <u>can</u> have duplicate names.** (This makes it very confusing, but **it is OK.**) But I can still put the two Contacts into the same Household object, as described next.)

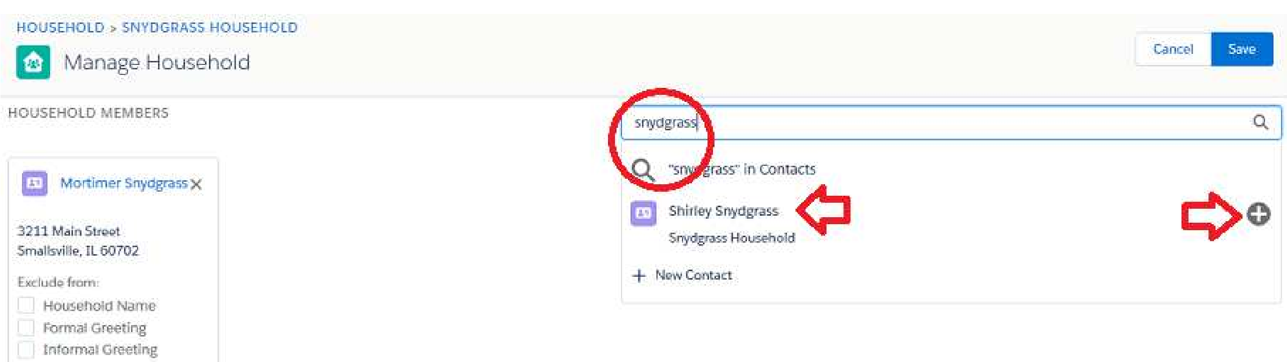
1.1.4.3 *Put the two Contacts into the same Household*



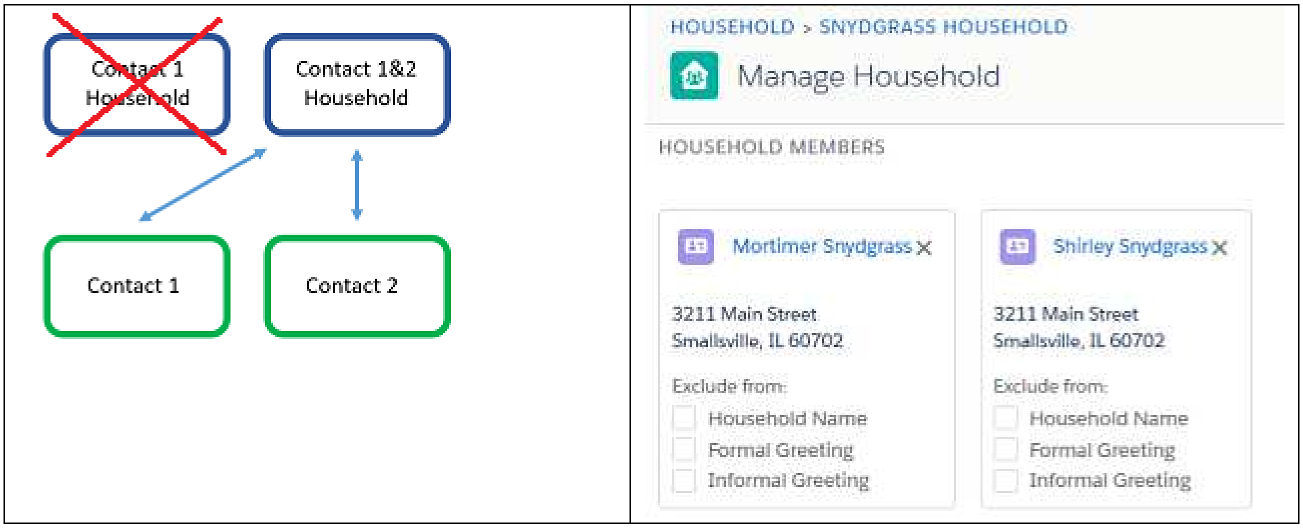
I link the second Contact to the Household object related to the first Contact (as pictured above). **Salesforce automatically deletes the now unused Household object and updates the updated one.**



As pictured above, I go to the Contact record of the contact that I want to make *Primary* for the Household. Then I click on that person's Household Account record (**red** arrow) and click the "Edit" button (**red** circle).



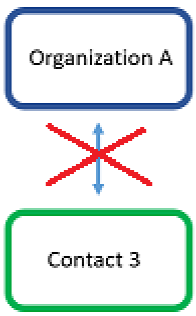
I just search for the Contact that I want to add to the Household (red circle above). Then I click on the "+" button (red arrow above right).



As pictured above, the two Contacts are now in the same Household.

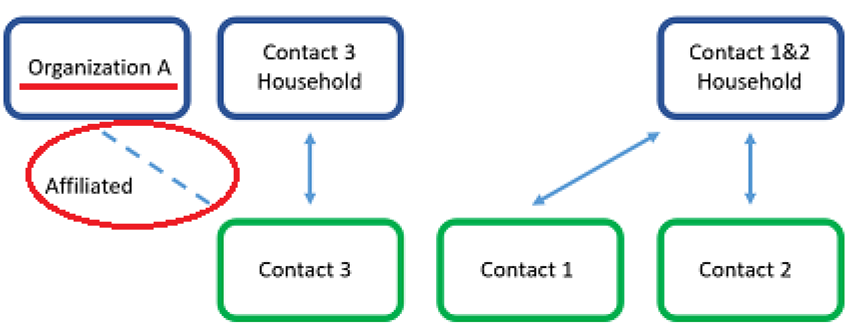
Make sure to click on the "*Save*" button in the upper right (not shown).

1.1.5 Organization objects don't have to have Contacts

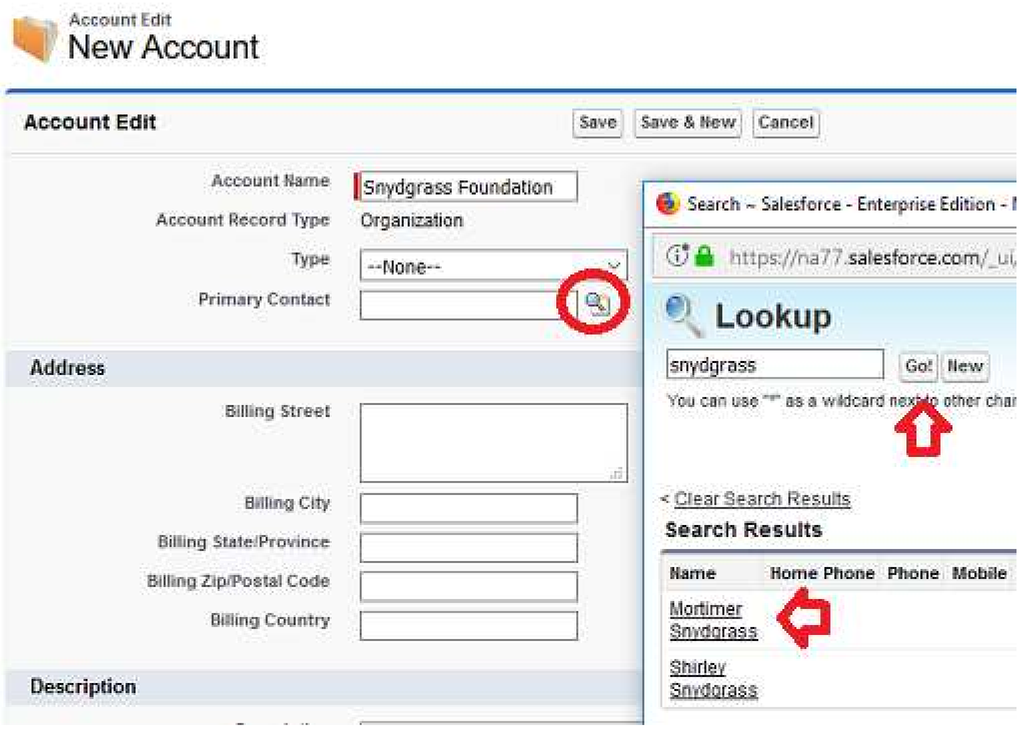


As pictured above, *Organizations* do NOT have to have *Contacts* (as do *Households*). ***When you create a Contact, Salesforce <u>never</u> automatically creates an <u>Organization</u> Account for the Contact.*** *(Only a Household Account).*

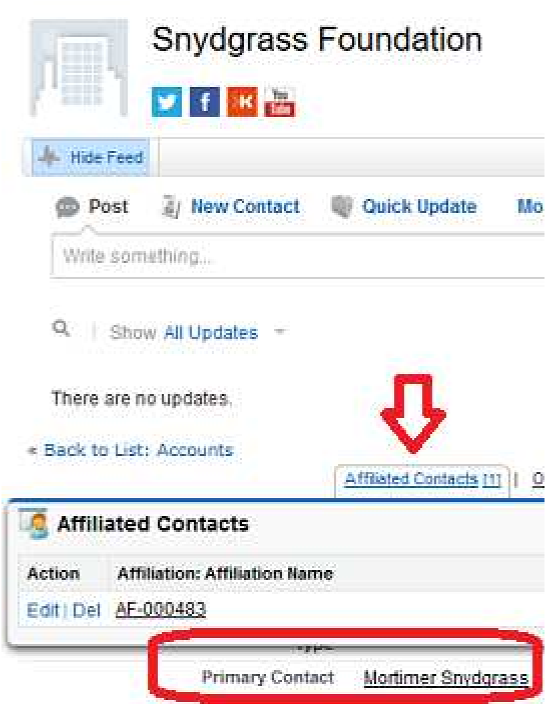
1.1.6 Contacts ARE typically <u>affiliated</u> to Organizations



As shown above in red, An *Organization* can be affiliated to one or more *Contacts*.

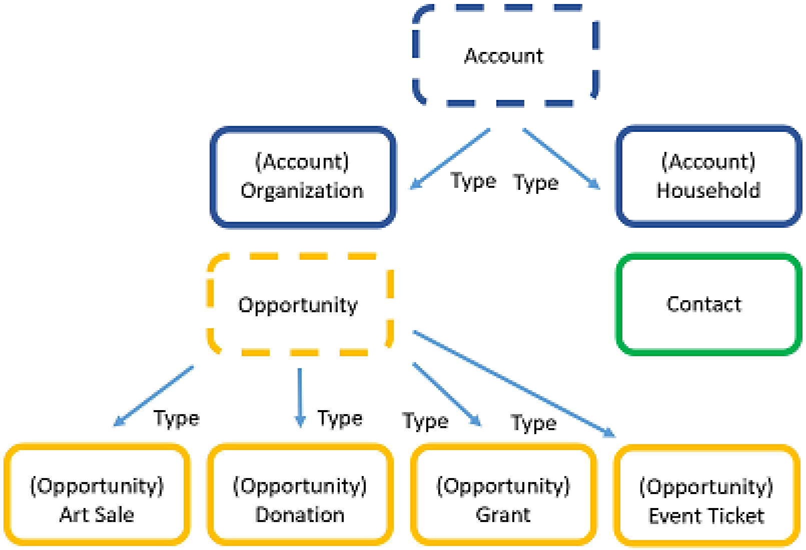


In the above picture, I am creating a new *Organization* Account (not *Household*). **I put-in a *Primary Contact* by searching on a Contact name and then clicking on it (red above).**



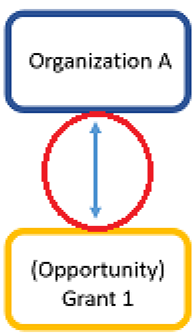
In the above picture, the *Organization* account now has an <u>affiliation</u> to a *Contact*.

1.2 OPPORTUNITY OBJECTS (DONATIONS, ART SALES, ETC.)

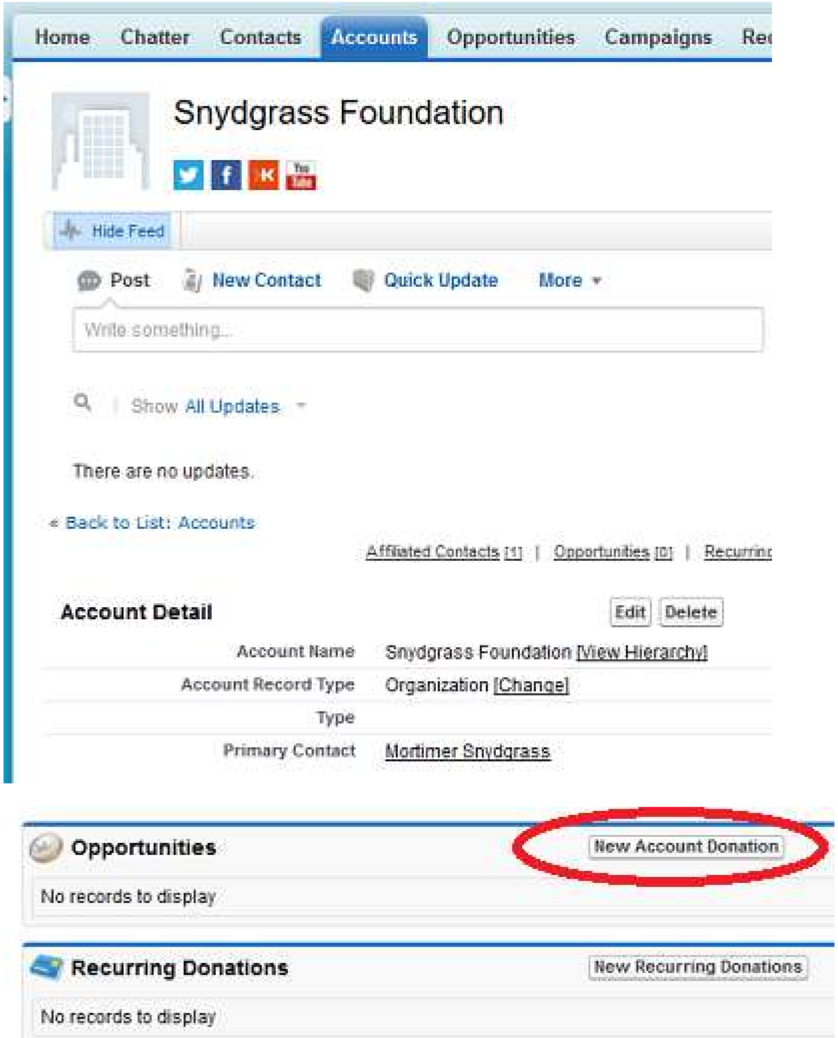


***Opportunity* object (yellow, above) is created to hold information about money being received** (a Donation, a Grant, an Art Sale, an Event Ticket, etc.).

1.2.1 Opportunity by an Organization – Grant example



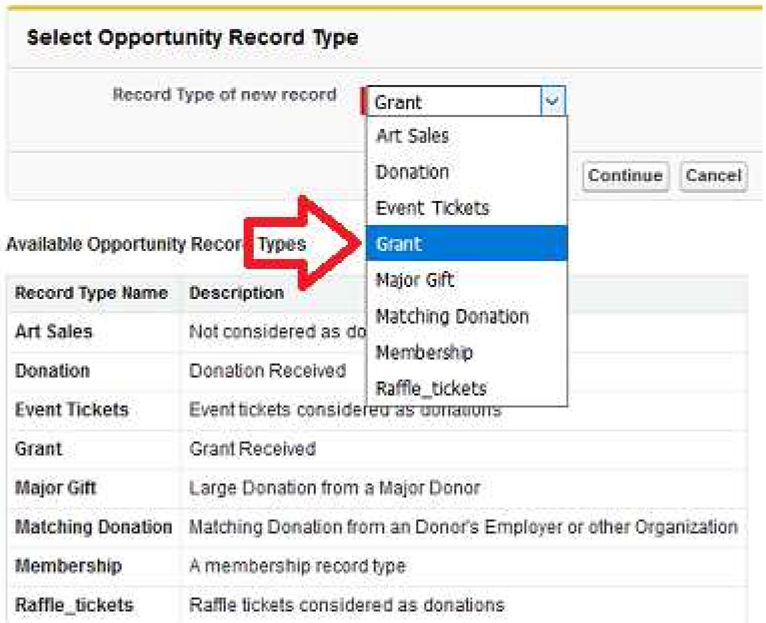
A *Grant* Opportunity can be created from an *Organization* account record. In the picture above, a Grant has been recorded.



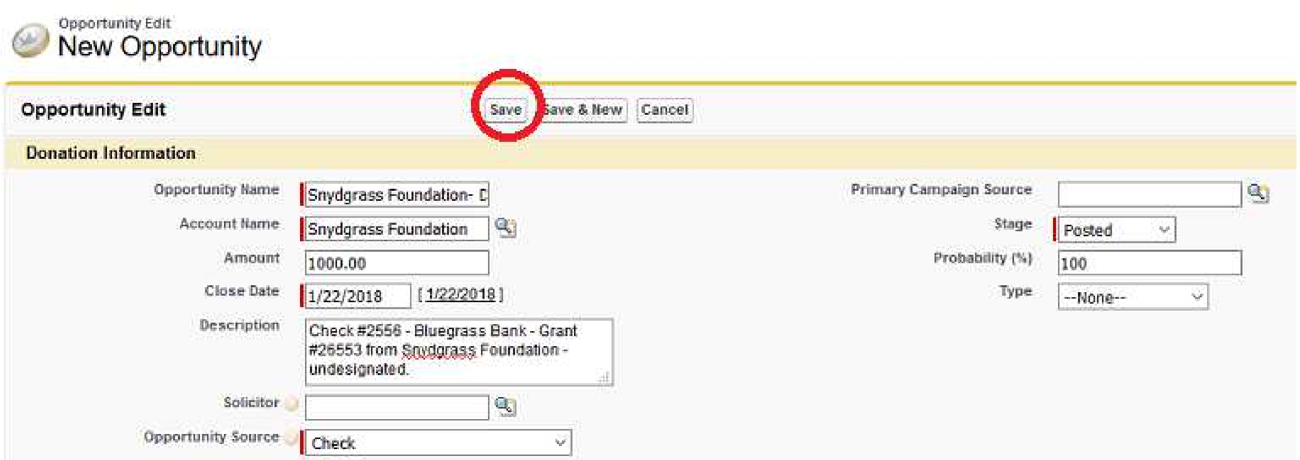
As pictured above, I go to the *Organization* account record for an organization (in this case, a Foundation). I scroll-down to the "*Opportunities*" section and click on the "***New Account Donation***" button (**red** circle – use this button to create <u>any</u> kind of Opportunity, such as an Art Sale, Event Ticket, Grant, etc.).

*Note that I don't go to the "Recurring Donations" section. I **ALWAYS** go to the Opportunities section for any kind of Donation, Grant, Art Sale, etc.*

Now I can choose <u>what kind</u> of Opportunity I am creating. (In this case, it is a Grant from an Organization.)



As pictured above, I click "*Grant*" from the drop-down and click the "*Continue*" button.



As pictured above, I fill-in the information for the *Grant*.

Amount (you don't need the "$").

Close Date – This is the date of the money transaction. (For checks, use the check date.)

Description - I put as much information as possible in the *Description*, including the check #, if known.

Solicitor – If you know the Solicitor, search for the name and click on it.

Opportunity Source – This is the type of payment (PayPal, Square transaction, they wrote a check, they gave cash, etc.)

Primary Campaign Source - If the Opportunity is related to a Campaign, I can search for the Campaign in the "*Primary Campaign Source*" field.

Note: If you don't see any Campaigns listed, when you search, try putting the first letter(s) of a campaign and add a "*" character, to search Campaign names. Example: *Lookup*: **i*** retrieves ***IheART 2017 Campaign***.

More information in the Campaigns section of this document.

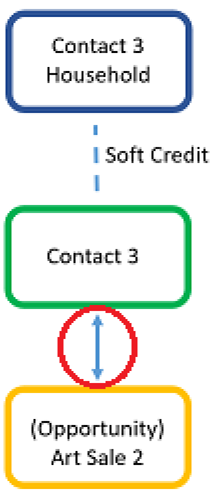
Stage - Make sure the Stage is "*Posted*." (We don't currently use any of the other options at Project Onward.)

Probability – (This is automatically filled-in by Salesforce).

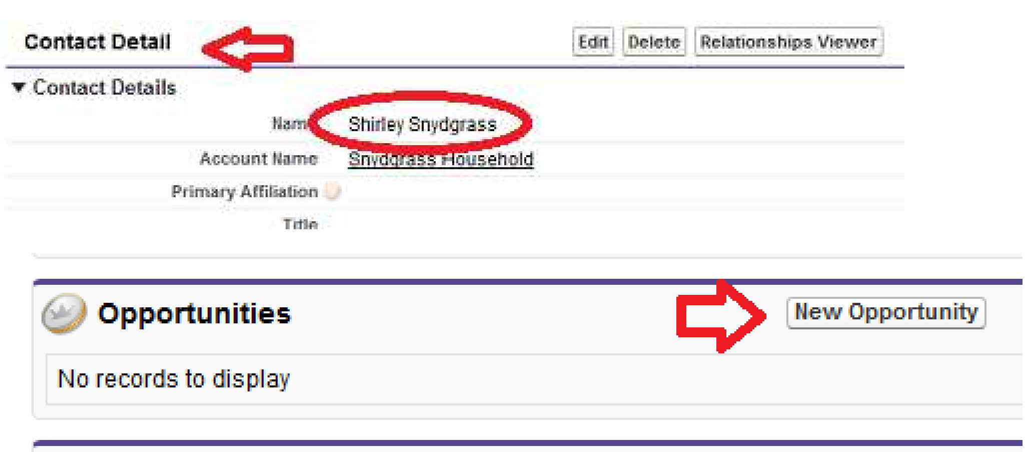
Type – Leave this as "None."

When everything is filled-in, I click on the "Save" button.

1.2.2 Opportunity by a Contact – Art Sales example

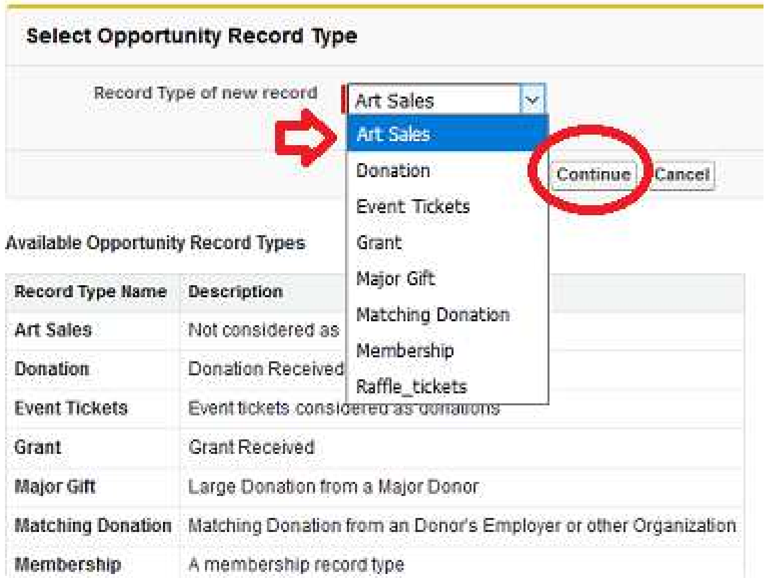


In the picture above, in **red**, an *Art Sale* opportunity has been created from the *Contact* record. In the background, Salesforce also links the *Opportunity* to the associated *Household* object (called a "*Soft Credit*" link).

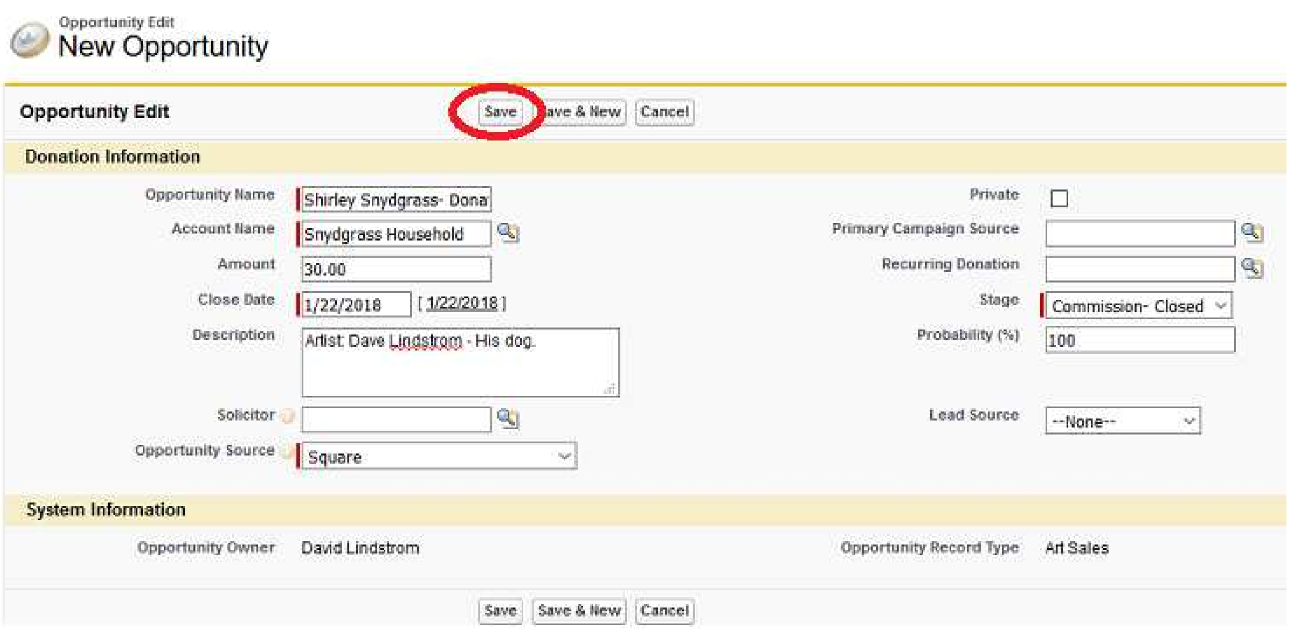


As pictured above, go to the *Contact* record and scroll-down to the "*Opportunities*" section. **Click on the "New Opportunity" button.**

Now I choose the type of Opportunity. (In this case, it is an Art Sale).



As pictured above, click on "*Art Sales*" and click the "*Continue*" button.



As pictured above, I fill-in the information for the *Art Sale*.

Amount (you don't need the "$").

Close Date – This is the date of the money transaction. (For checks, use the check date.)

Description - I put as much information as possible in the *Description*, including the check #, if known.

Solicitor – If you know the Solicitor, search for the name and click on it.

Opportunity Source – This is the type of payment (PayPal, Square transaction, they wrote a check, they gave cash, etc.)

Recurring Donation – Leave this blank. (Note that we are in the process of tailoring Salesforce to use this field. If you know the Opportunity is recurring, for now, just note it in the Description field.)

Primary Campaign Source - If the Opportunity is related to a Campaign, I can search for the Campaign in the "*Primary Campaign Source*" field.

Note: If you don't see any Campaigns listed, when you search, try putting the first letter(s) of a campaign and add a "*****" character, to search Campaign names. Example: *Lookup*: **i*** retrieves ***IheART 2017 Campaign***.

More information in the Campaigns section of this document.

Stage - Make sure the Stage is "*Commission - Closed*." (We don't currently use any of the other options at Project Onward.)

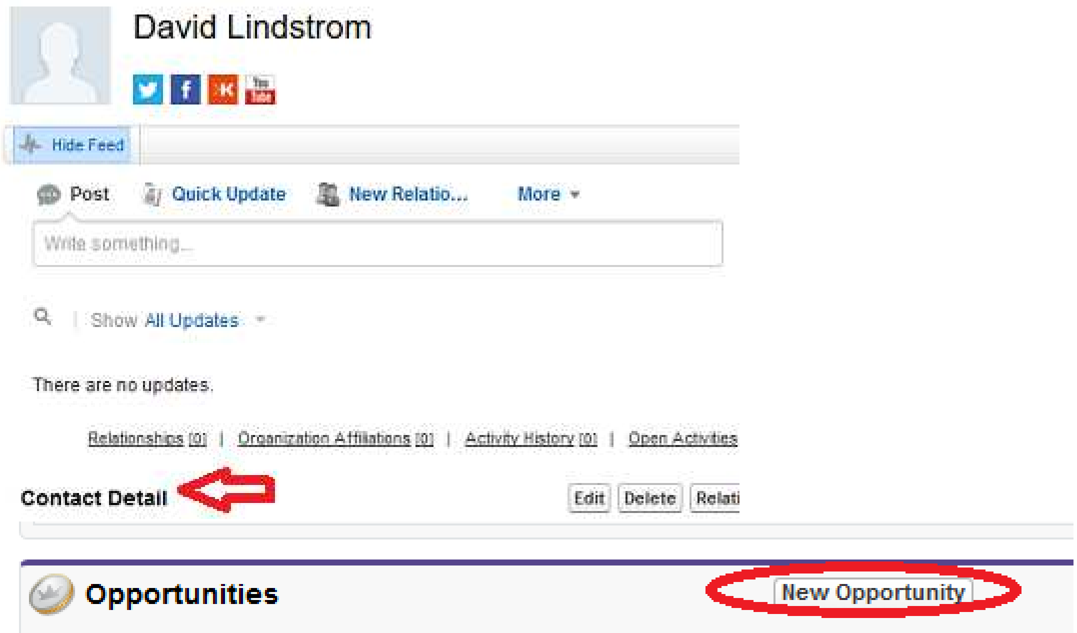
Probability – (This is automatically filled-in by Salesforce).

Type – Leave this as "None."

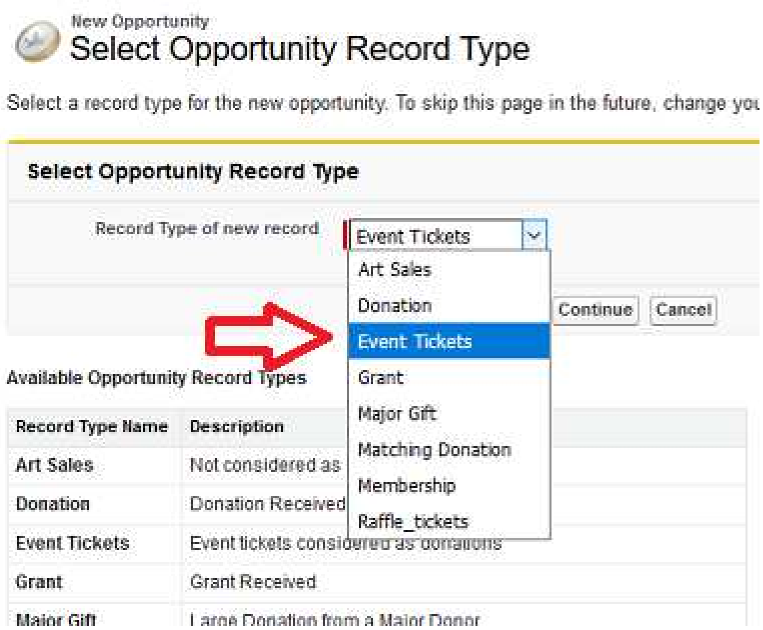
When everything is filled-in, I click on the "Save" button.

1.2.3 Opportunity by a Contact – Event Tickets Example

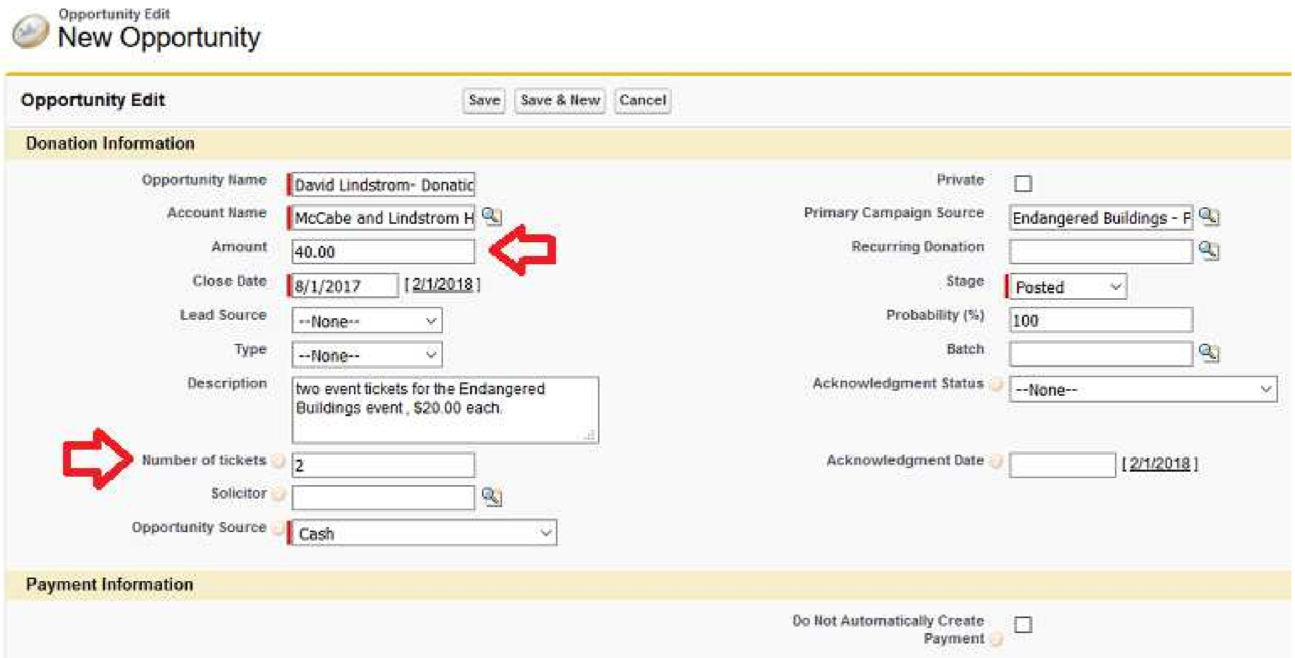
Event Tickets may be offered through the Project Onward website, or through an attached website, such as a Network for Good Campaign page. **Project Onward tracks Event Tickets as Donations.**



As shown above, from the Contact Details record, go to the Opportunities section and click the "New Opportunity" button.



As shown above, select "Event Tickets" from the drop-down.



As shown above, fill out the Opportunity record fields for "Event Tickets." Take note of the red arrow fields:

Amount (you don't need the "$"). ***This is the total amount. Note that in this example, two tickets are being bought, at $20 each. So $40 goes in the Amount field.***

Close Date – This is the date of the money transaction. (For checks, use the check date.)

Lead Source – Leave blank.

Type – Leave blank.

Description - I put as much information as possible in the *Description*, including the check #, if known.

Number of Tickets – IMPORTANT. Fill-in the number of tickets for the Opportunity.

Solicitor – If you know the Solicitor, search for the name and click on it.

Opportunity Source – This is the type of payment (PayPal, Square transaction, they wrote a check, they gave cash, etc.)

Private (checkbox) – Leave unchecked.

Primary Campaign Source - If the Opportunity is related to a Campaign, I can search for the Campaign in the "*Primary Campaign Source*" field.

> Note: If you don't see any Campaigns listed, when you search, try putting the first letter(s) of a campaign and add a "*" character, to search Campaign names.
> Example: *Lookup*: **e*** retrieves ***Endangered Buildings event***.
>
> *More information in the Campaigns section of this document.*

Recurring Donation – Leave this blank.

Stage - Make sure the Stage is "*Posted*." (We don't currently use any of the other options at Project Onward.)

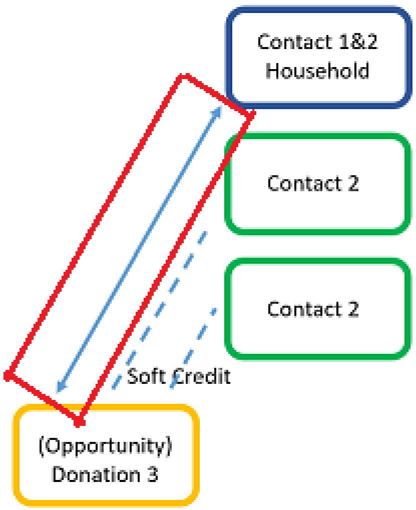
Probability – (This is automatically filled-in by Salesforce).

Batch – Leave this as "None."

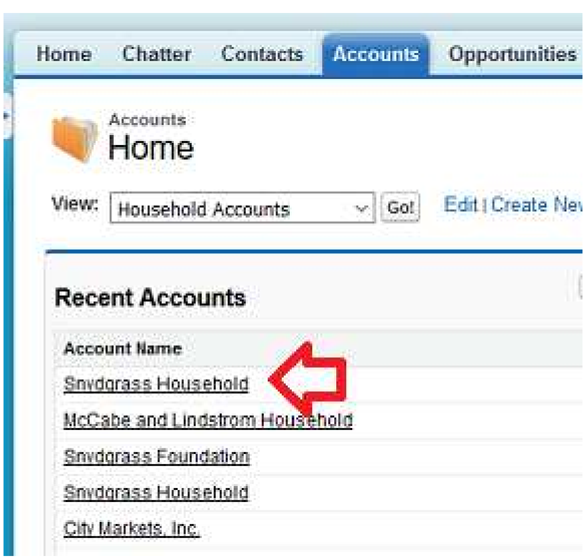
Acknowledgement StatusI – Leave it set to "None."

When everything is filled-in, I click on the "Save" button.

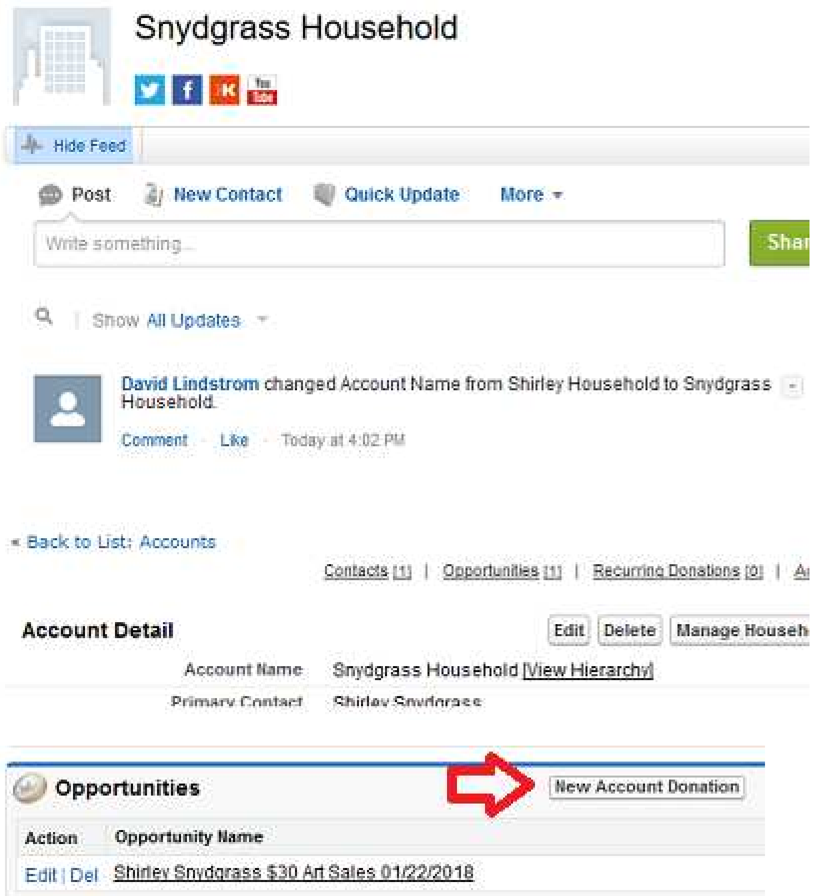
1.2.4 Opportunity by a Household – Donation Example



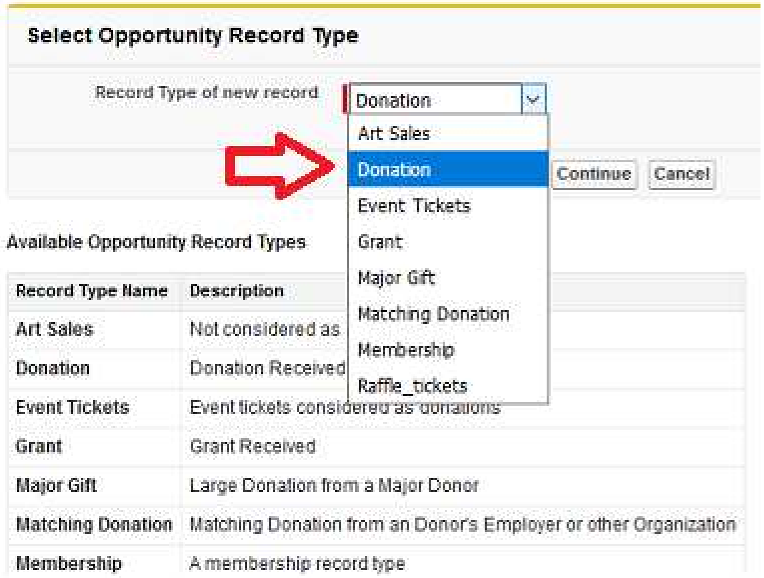
In the picture above, in red, a *Donation* Opportunity has been created on the *Household* record. Note that the *Contacts* associated with the *Household* are also, automatically linked by Salesforce ("*Soft Credit*"). **The Opportunity is credited to the Primary Contact in the Household.** And, the other Contact(s) in the Household are "Soft-Credited."



As pictured above, click on the *Household* account object that you want to credit the *Opportunity* to.

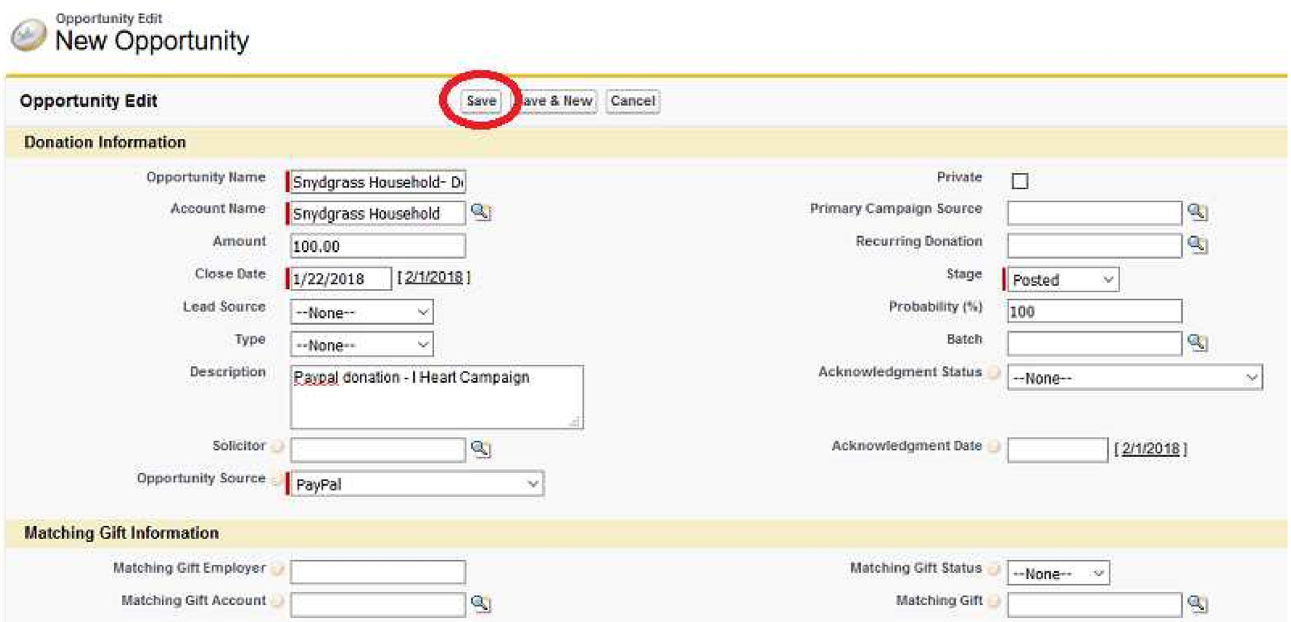


As pictured above, on the *Household* object, scroll-down to the *Opportunities* section and click on the "*New Account Donation*" button.



As pictured above, click on "*Donation*" and click the "*Continue*" button.

Adsfsadf



As pictured above, I fill-in the information for the *Donation*.

Amount (you don't need the "$").

Close Date – This is the date of the money transaction. (For checks, use the check date.)

Lead Source – Leave as "None."

Type – Leave as "None."

Description - I put as much information as possible in the *Description*, including the check #, if known.

Solicitor – If you know the Solicitor, search for the name and click on it.

Opportunity Source – This is the type of payment (PayPal, Square transaction, they wrote a check, they gave cash, etc.)

Private (checkbox) – Leave blank.

Primary Campaign Source - If the Opportunity is related to a Campaign, I can search for the Campaign in the "*Primary Campaign Source*" field.

Note: If you don't see any Campaigns listed, when you search, try putting the first letter(s) of a campaign and add a "*****" character, to search Campaign names. Example: *Lookup*: **i*** retrieves ***IheART 2017 Campaign***.

More information in the Campaigns section of this document.

Recurring Donation – Leave this blank. (Note that we are in the process of tailoring Salesforce to use this field. If you know the Opportunity is recurring, for now, just note it in the Description field.)

Stage - Make sure the Stage is "*Commission - Closed*." (We don't currently use any of the other options at Project Onward.)

Probability – (This is automatically filled-in by Salesforce).

Batch – Leave blank."

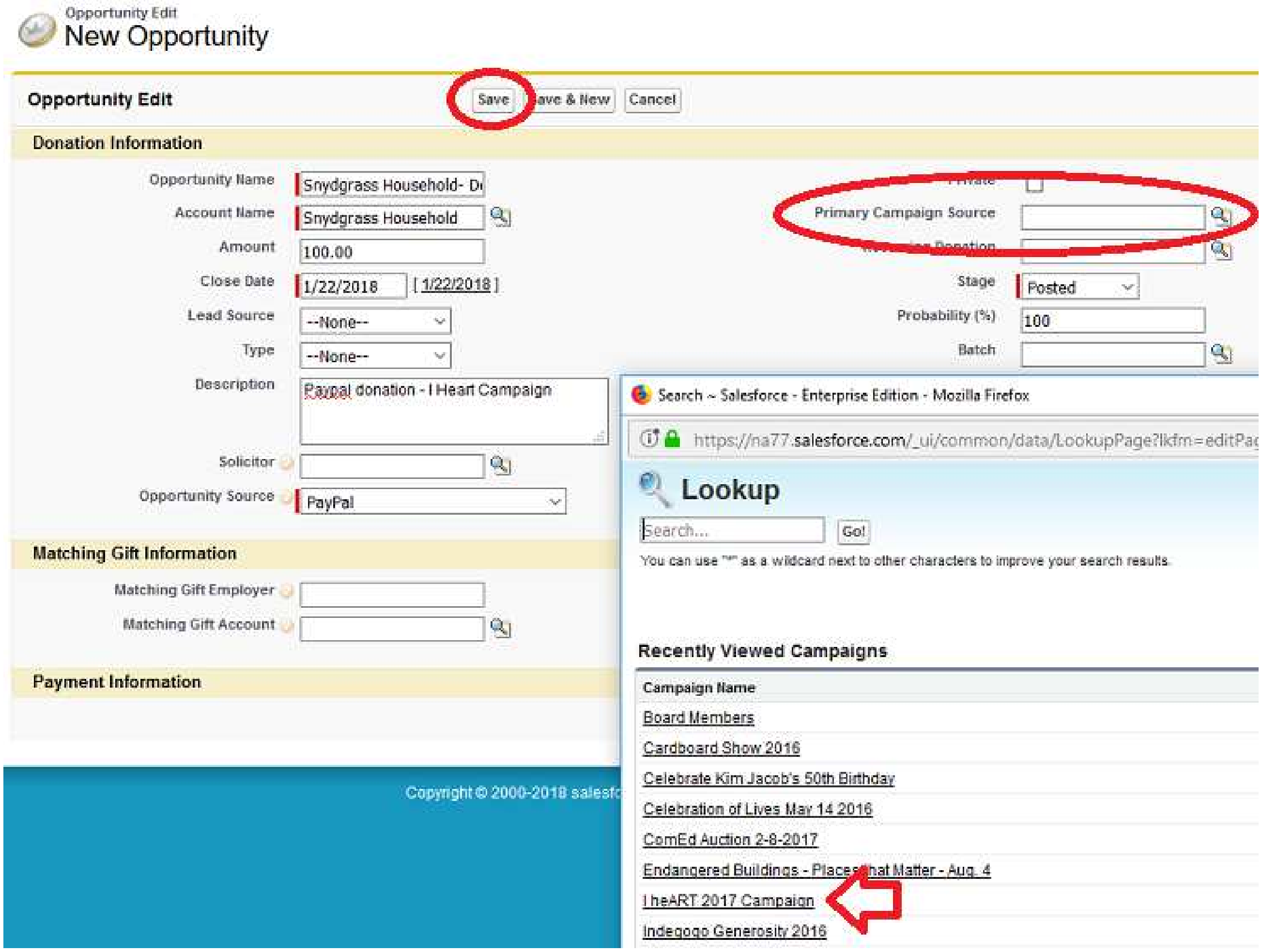
Acknowledgement Date – Leave blank.

Matching Gift Information section – If you know the gift is matching, leave this section blank for now, and add as much detail as you can about the gift and company in the *Description* box. There will be updates to procedures for matching gifts at a later time.

When everything is filled-in, I click on the "Save" button.

1.2.5 Opportunities – Primary Campaign Source field

On any kind of Opportunity, the Opportunity may be related to a Campaign. If it is related to a Campaign, it is important to use the Primary Campaign Source field. ***This can be done when you are creating a new Opportunity. It can also be done by editing a current Opportunity.***



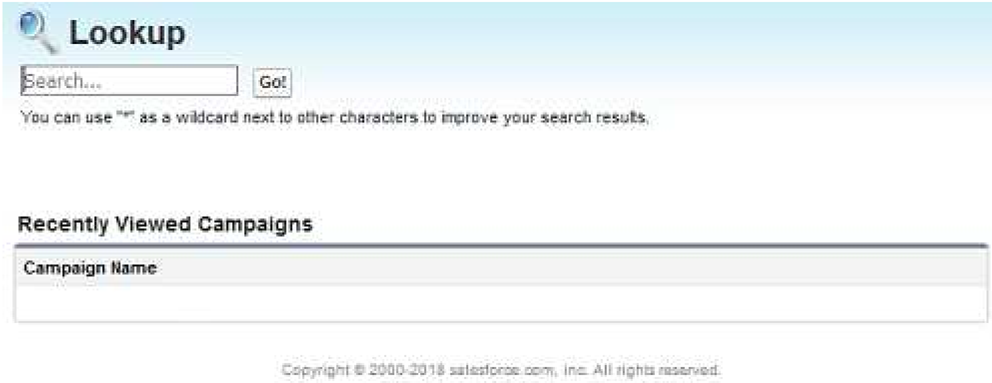
As pictured above, relate the Opportunity to a Campaign using the *Search* (magnifying glass icon), at the right of the ***Primary Campaign Source*** field (**red** circle).

Campaigns that you have viewed in the past are at the bottom of the Lookup dialog. **Click on the appropriate campaign name to populate the Primary Campaign Source field.**

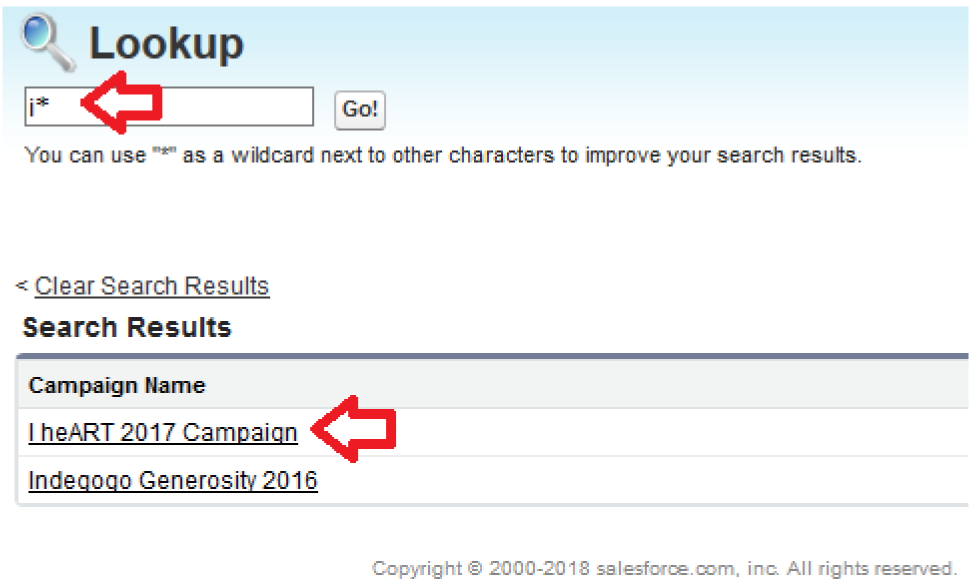
What if no campaigns are listed? See the following section, "*Lookup Campaigns dialog.*"

Click the "Save" button when the information is complete.

1.2.5.1 Lookup Campaigns dialog – Searching

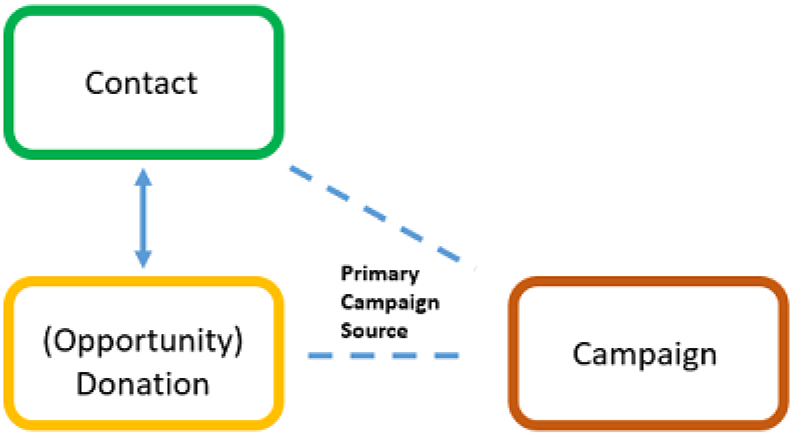


As pictured above, when using the Lookup dialog for Campaigns, you may not see all (or any) of the campaigns listed.



In this case, type-in the first letter(s) of the campaign that you are looking for. Use the wildcard "*" character, and click on the "Go" button. In the example above, I typed-in the letter "**i**" with the wildcard character, "*****." (Note that I didn't have to worry about capitalization.) **Then click on the appropriate campaign to populate the Primary Campaign Source field, as in the example in the previous section.)**

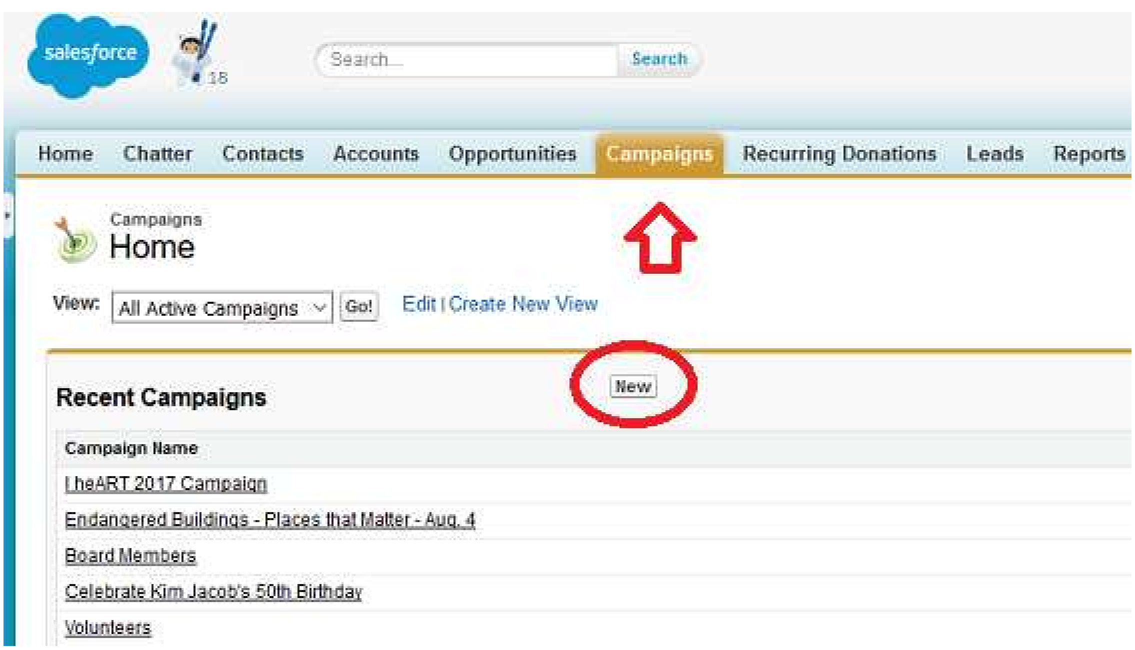
1.3 CAMPAIGNS



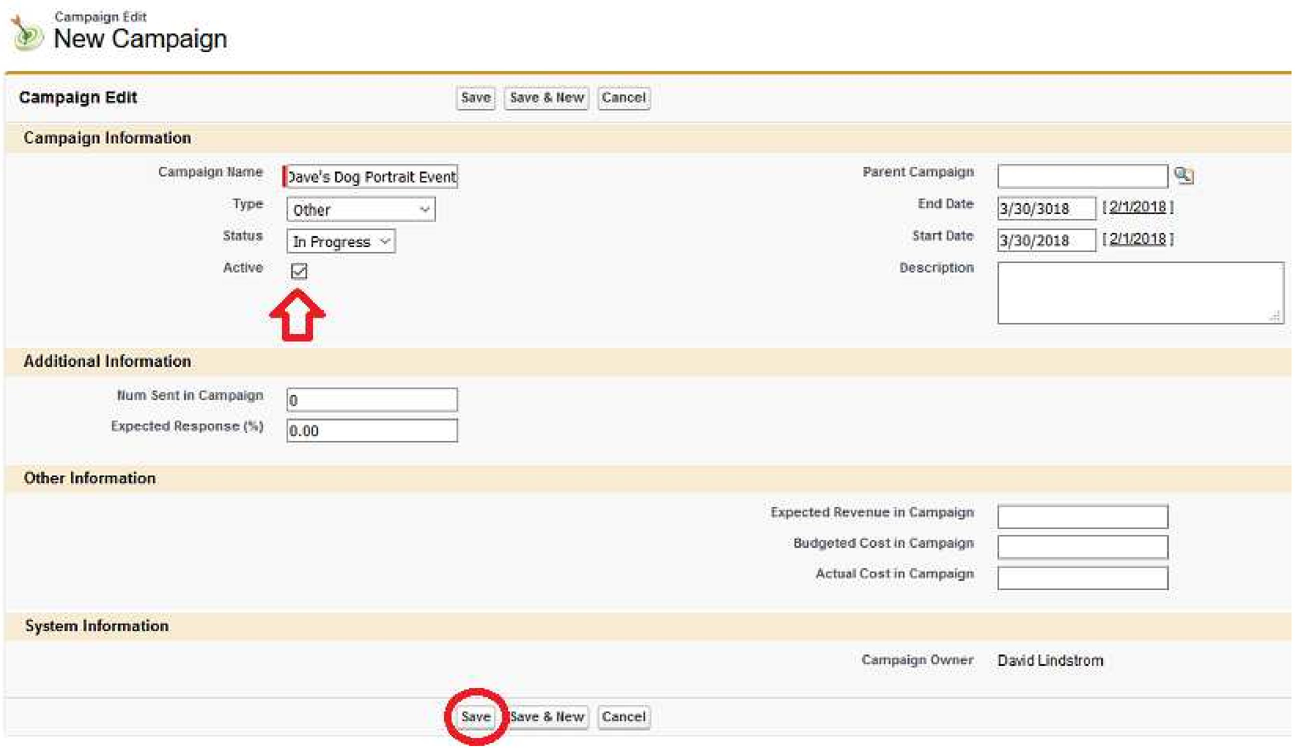
Campaigns can be used to group Opportunities, Contacts and even Organizations to specific events and/or longer fundraising efforts. Project Onward uses campaigns to track Opportunities (donations, event tickets, art sales, etc.) that have been associated with that an event or fundraising effort.

As seen above, Opportunities can be linked to Campaigns (using the Primary Campaign Source field.) **Before an Opportunity can be linked to a campaign, the Campaign must be created and active.**

1.3.1 New Campaigns



As pictured above, click on "Campaigns" on the main menu to see the campaigns that have been created. To create a new campaign, click on the "New" button (red circle).



As pictured above, fill-in the information in the first section:

Campaign Name – The campaign might be an event or an ongoing effort.

Type – At Project Onward, we have not been tracking the type of campaign. You can choose a type from the drop-down list, or set it to "other" (at the bottom of the list).

Status – Choose "In Progress" from the drop-down. (At Project Onward, we do not track specific stages of a campaign.)

Active (checkbox) – VERY IMPORTANT – This box must be checked in order for the Campaign to be linked to Opportunities.

Parent Campaign – Campaigns can be setup into a hierarchy, so that reporting might be done for specific groups or types of campaigns. At Project Onward, we have not been doing this so far. Leave this field blank.

End Date / Start Date – If the campaign is for a one-day event (as in the above example), use the same date for both fields. If the campaign is for a length of time, set the dates accordingly.

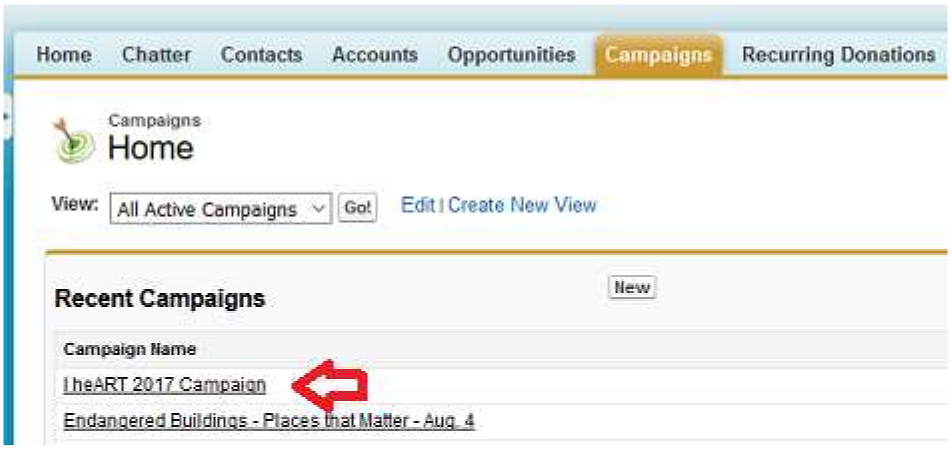
Description – Describe the campaign, or add any notes about it.

A note on "Active" and on End and Status – As long as a campaign is Active, you can link opportunities to it. This is true, even weeks or months before or after the start or end. As long as it is Active, you can link to it. **When a campaign is completely done, and no more activity will need to be reflected in reports, you can set the Status to "Completed" and uncheck the "Active" checkbox.**

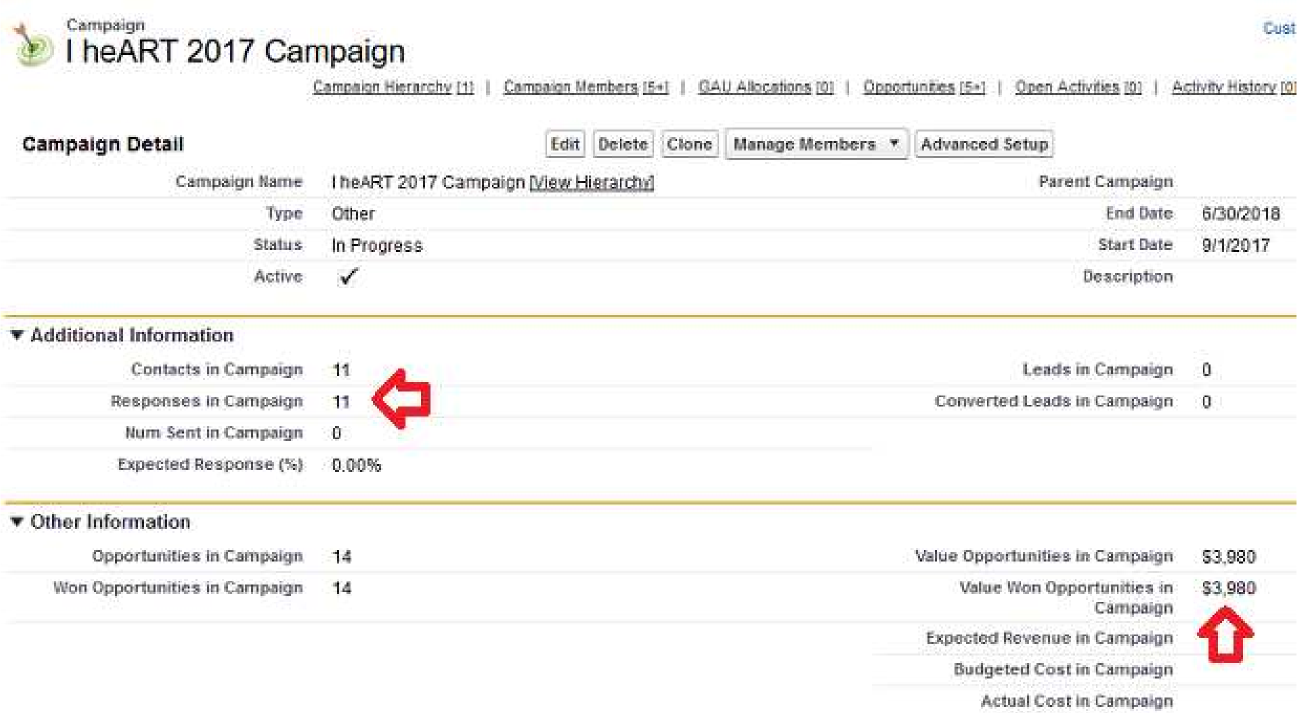
Additional and Other Information sections – Leave these sections blank.

Click the "Save" button when you have completed filling-in the information.

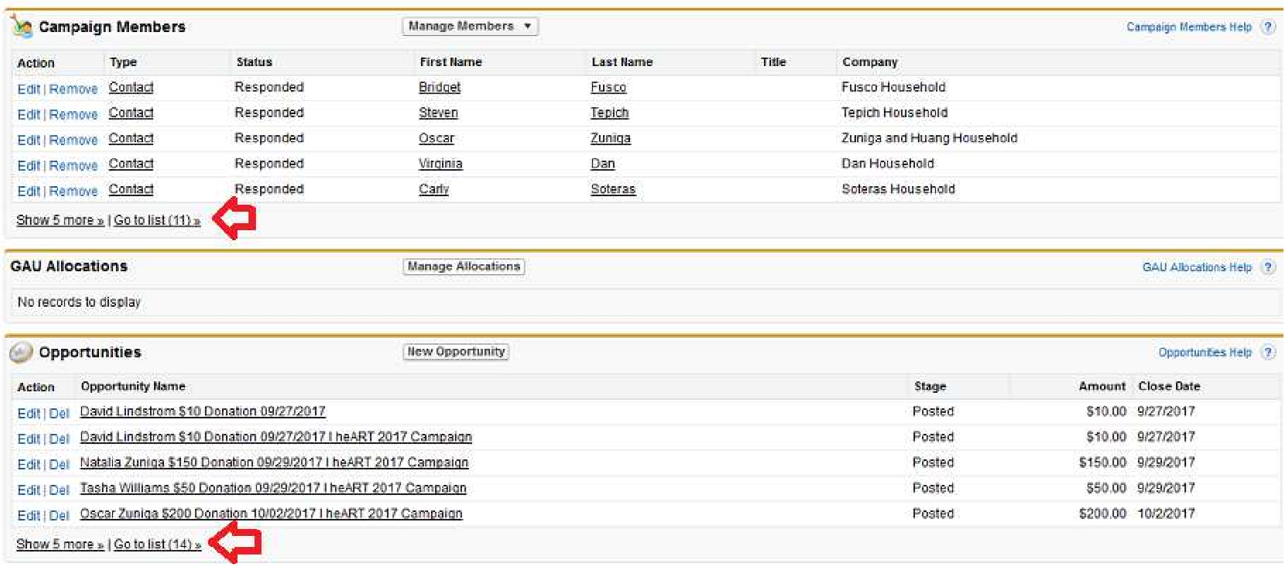
1.3.2 Campaign Details



As pictured above, from "Campaigns" on the main menu, click on a campaign to see the details.



As pictured above, the top section of the Campaign Details page gives overall statistics. The red arrows show the number of Opportunity records (i.e. people who responded to the campaign), and the total dollar-amount of the Opportunities.

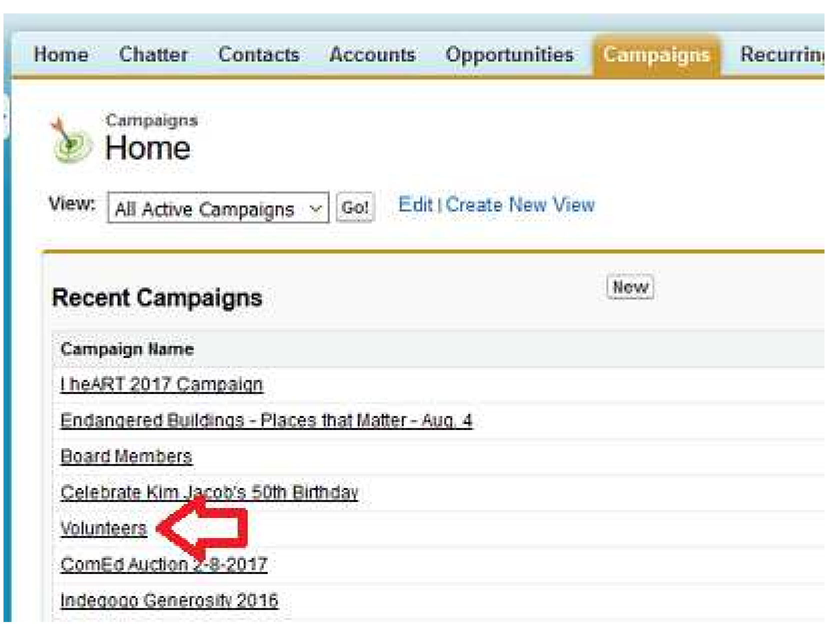


The lower sections of the Campaign Details screen shows a breakdown of the number the people who responded (i.e. Contacts associated with the Opportunities) and the actual Opportunities.

Note that only five records in each section are displayed. For a complete listing, click on the links by the **red** arrows.

1.3.3 Using Campaigns to track groups of people

Asfdsd



A second use for Campaigns at Project Onward is to track groups of people. As shown above, there is a campaign called “Volunteers” (**red** arrow). **Click on the link for the Details page, which shows all the people assigned to the “Volunteers” group.**

Campaign Members Manage Members

Action	Type	Status	First Name	Last Name	Title	Company
Edit | Remove	Contact	Responded	Heloise	Amez-Droz		Amez-Droz Household
Edit | Remove	Contact	Responded	Maretta	Reaves King		Reaves King Household
Edit | Remove	Contact	Responded	Aeron	Maxwell		Maxwell Household
Edit | Remove	Contact	Responded	Kimberly	Jacobs		Jacobs Household
Edit | Remove	Contact	Responded	Sara	Altieri		Altieri Household

Show 5 more » | Go to list (50+) »

As shown above, the Campaign Members section of the Campaign Details page shows five of the members of the “Volunteers” campaign. Click on the link for the complete list (**red** arrow).

Note that the campaigns such as “Volunteers,” “Staff,” etc. may be out of date. These groups need to be actively maintained. Training for this is in a future training module.

1.4 Auto-Acknowledgements of Opportunities

Acknowledging Opportunities in Salesforce was demonstrated in a the “Salesforce Query” training session, and is part of the video. Further training on this will be provided.

1.5 Reports

A general introduction to Reports was given in the “Salesforce Query” training module. A separate training module on Salesforce Reports will be provided in the future.
