DRAFT A

Training Checklist – Basic

[Organization Name]
Larry Bednar

March 16, 2015

Purpose

This document provides a checklist of topics to be covered during training of users for SalesForce.

The current version of this document may require some editing to remove references to the previous organization using this outline, and to replace those with [Org abbrev]-specific text.

Overview

Why SalesForce?

- “cloud” location

  accessible from anywhere

  enhanced physical data security
- 3d party integration software available

  mass emailing tool integration

  event management software data transfer/coordination

  email/database integration (such as MailChimp)

  land easement tracking

  on-line payment processing

  volunteer management
- SalesForce foundation donation of 10 free user licenses to nonprofits, with a donated 1 Gb of storage space provided free of charge
- Customizable

Training Checklists

Topics to be covered in training are listed in subsections below.

Checklist – Data Structure

The overall data structure of the most important SF objects for your organization has been diagrammed in several documents provided during the data migration work performed for your organization. These are available in the BaseCamp project used to manage your data migration project and can be downloaded for your reference.

1. [ORG ABBREV] ERD SF Main.png

Provides a high-level depiction of the overall structure of the main data objects in your SF instance, and the most important relationships defined between these objects.

2. SF Schema Builder

   The "Schema Builder" allows you to construct visual displays of any set of Salesforce tables you select.

   Access the "Schema Builder" by navigating to "Setup/App Setup/Schema Builder"

This checklist covers tasks expected during typical use of SalesForce by a general-purpose user.

1) SalesForce standard data structure

   (Show high-level data model diagram)

   a) Organizations/Accounts ("[Org abbrev] Organizations")

      The "information hub" of SalesForce data

      Can represent a business, organization, foundation, committee, or an individual

      Can indicate another organization as a "parent"

   b) Contacts ("Persons")

      i) Direct link to Organization

         I. SalesForce *typically* associates a contact with *one and only one* organization using the contact "OrganizationName" field

            Represents the "primary" or "official" organization associated with the contact

                  Employer

                  Officially designated contact for an organization/business

            For "individuals" an organization record is created to represent *only* that person.

         II. Organization/contact affiliations

            Can enter "role" played by contact with regard to the organization, and start/end date of the time period when that role is applied

            Provided as a customization to "standard" SF configuration with installation of the SF "Non-Profit Starter Pack" packages

            Not required by SalesForce

         III. Contact/contact relationships

            Represents relationships between one person and another person

            Provided as a customization to "standard" SF configuration with installation of the SF "Non-Profit Starter Pack" packages

         IV. Activities/Tasks

            Typically used to record communication actions taken towards the contact. Might be used to log records of phone calls, email communications, etc.

            Can also be used to record other types of actions

            Can be set to provide reminder emails

   c) Donations/Opportunities ("Gifts and Pledges")

Can be used to represent a variety of “opportunities”, either potential or actually realized:

Donation, grant, volunteer action

i) Opportunity/organization linkage

ii) Opportunity/contact role

(1) Link to contact record for responsible “cultivator”?

d) Payments

Represents a specific payment associated with a “donation”. Each donation can have multiple “payments” associated.

Provided as a “customization” to a standard SF instance with installation of the SF “Non-Profit Starter Pack” (NPSP) packages.

e) Documents

Stores email templates, mail merge templates, tip sheets, etc for general access by SalesForce users.

f) Campaigns

Except for “umbrella” campaigns used as “parents” to other Campaigns, each campaign typically represents an outreach effort providing a single message using a single communication method.

i) Campaign “parents”

Each campaign can designate another campaign as a parent. This can be very helpful in tracking various actions taken during different portions of an “umbrella” campaign.

Examples:

“Umbrella” event with different locations, sessions, etc.

Fundraising event with different outreach approaches used and tracked

ii) Campaign members

Stores linkage between campaign record and contacts who are targeted by the campaign

Indicates “status” of the member in the campaign (for example “planned contact”, “message has been sent”, “has responded”, etc.)

2) Customizations for this organization

The following objects in SalesForce have been created as unique customizations for this specific instance of SalesForce:

a) Legacy Customizations

Created during earlier development preceding the project for NPSP V3 installation. The stored data and usages have not been changed by the NPSP V3 conversion.

i) Donor Send Out

ii) Donor Send-Out Recipient

iii) Funds to Project

iv) Project Contact

v) Project Donor

vi) Project Forecast

b) NPSP V3 Customizations

These objects were created by the NPSP V3 installation used in the most recent development project

i) Address

ii) Affiliation

Each record represents a link between an Account ([ORG ABBREV] Organization) record and a Contact (Person).

It's possible to specify what sort of affiliation is documented ("board member", "owner", etc) as well as start and end dates for the affiliation or the status ("current"/"former")

iii) Batch

Used in batch data entry processes that are provided by the NPSP

iv) Household

Not used under structuring of [ORG ABBREV] data, which instead uses Account ([ORG ABBREV] Organization) records with a record type of "Household Account" to represent households that persons are associated with.

v) NPSP Data Import

Used by special data import wizards provided with NPSP V3.

vi) Payment

Each record represents an individual payment that is a component of a single Opportunity (Gift)

vii) Recurring Donations

Often goes unused by organization using the NPSP V3.

When used, each record provides details of a recurring donation "promise" made by a donor. A recurring donation "promise" differs from a pledge – pledges have a finite number of donations promised, so that the total expected revenue is known from the start. "Recurring Donations" by contrast are open-ended, with the donor not specifying how long these promised regular donations will be maintained.

With NPSP V3, pledges are typically stored using an Opportunity (Gift) record, with linked NPSP Payment records used to represent each individual payment expected from that pledge.

Recurring payment promises that are established with assistance of on-line payment processors typically store records describing these arrangement externally. Organizations then often opt to avoid any manual effort required to create parallel records in the NPSP Recurring Donations object.

viii) Relationship

ix) Used to document relationships between one person and another person.

c) MailChimp For Salesforce custom objects

Several custom objects are created with installation of the Mailchimp For Salesforce application. These tables are used to hold copies of MailChimp data linked to Salesforce Lead and Contact ("Person") records. The placement of copies of these data in Salesforce allows a Salesforce user to generate reports that make use of MailChimp usage and response statistics, etc.

Users will typically not need to interact directly with these tables, unless they need to understand these objects when constructing reports using these objects.

A visual/graphic representation of these custom MailChimp objects is provided in a PNG format within the "[Org abbrev]_erd_mail_chimp.png" file available in the BaseCamp project used by Idealist to store information needed during the project to convert [ORG ABBREV]'s database to use NPSP V3.

i) MC Campaign

ii) MC Campaign Hourly Stats

iii) MC Interest Group

iv) MC Interest Grouping

v) MC List

vi) MC Merge Variable

vii) MC Query

viii) MC Query Filter

ix) MC Static Segment

x) MC Subscriber

xi) MC Subscriber Activity

Checklist – Basic Use

1. Search functions

   A) Always search before entering new records

      Most effective searches use a part of a record "name" that can be depended on to be reliably present on the record you're searching for.

      It's sometimes helpful to avoid searching for parts of names that might have been abbreviated when the record was first entered:

      Corporation, Foundation, etc.

      If you search for "Lars Bednarsky" the search may not "find" "L. Bednarski". Searching for "Bedn" will turn up either...

   B) Restrict search to appropriate information area to get most concise results

      If you know you're looking for an Organization, set the search to exclude display of matching records from Donations, Contacts, etc.

2. Data entry

   A) Consistent naming approaches help a LOT for Campaigns, Donations, Documents

      Examine other records that you know have been named well to understand the approach that should be consistently used

B) Distinction between direct organization/contact link and links via “affiliation”

C) Entering Organizations and Contacts

I. To avoid creating duplicate entries, search for both Organization and Contact records that might have been previously entered before creating new records

Need to have a clear idea of how you want organization/contact links represented, and how your desired representation compares to any preexisting records you find in the database.

Primary relationship of contact to organization generally indicates link using contact “OrganizationName” field

Secondary relationship, or a need to store the “role” the contact plays at the organization might indicate a need for entering contact/organization “affiliations”

There's some judgment involved here – be thoughtful and talk to others as needed to understand how to make that judgment.

II. If a new contact is being entered as an “individual” without a primary relationship to some business or organization:

(1) Create a new contact record directly

(2) Leave the “OrganizationName” field blank

SalesForce will automatically create a linked Organization with the same information you enter on the Contact record. (This automation is not “standard” SF functionality, but is a part of the installed “Non-Profit Starter Pack” applications.

III. If a new “organization” contact is being created, the most sure-footed approach is to create new contacts from the organization that will be linked by the contact “OrganizationName” field.

This approach automatically copies information like address from the organization record to the new contact record – often reduces data entry effort/errors.

D) Entering Campaigns

Not every user can work with Campaigns (to create new Campaigns, etc). Only users with “marketing user” privilege can perform these functions.

It is typically wise to restrict this privilege to a subset of users to ensure that the persons creating and maintaining campaign records are those who are well-practiced. Very much of the power of Campaigns is obtained only with a skillful and very consistent approach being applied.

Consistent, systematic naming approaches are particularly helpful with campaigns. For instance,

I. If you use “child” campaigns, it is helpful that children are named with the name of the “parent” campaign as the prefix. For instance “Capital Campaign 2014” as a parent, and “Capital Campaign 2014 12-01 Email” as a “child”.

This naming approach can be used to advantage in reports and in searches

II. The letter “tabs” provided for the user to quickly find Campaigns work to greatest benefit if Campaigns are not named with year as the prefix. If the year (“2014”, “2000”) is used as a prefix, all Campaigns will be on the first tab. If year values are used later in the name (“Capital Campaign 2014”, “George Smith Fundraiser 2012”), then the “C” or “G” tabs can allow a user to very rapidly navigate to a campaign of interest.

E) Entering Donations

I. Search first for the Organization and/or Contact records you want to associate with the donation.

For most efficient data entry, if either an Organization or Contact record need to be created, that task should be completed *before* you begin entering the “donation” itself.

II. Navigate to the record representing the donor.

If the donation is from a person, navigate to their “Contact” record. If the donation is from a business or organization, navigate to their “Organization” record.

III. On the Organization/Contact layout, use the “create... donation” button to begin the creation of a new donation record

You'll find this button located just above the related list of “donations” on the layout. On the Contact page layout the button is named “create contact donation”. On the Organization layout, the button is named “new account donation”.

These buttons partially automate creation of a new donation in useful ways. Links to the contact or organization record you started from are automatically established, a new donation name is automatically created, etc.

IV. Double-check the construction of the donation “name” and fill in other field values appropriately

It is usually recommended that SF donation names should be constructed to include: the donor name, an indication of the type of donation, and the date of the donation.

Examples:

Joe Smith Donation 1/1/2010

Acme Painting Pledge 1/31/2011

V. If appropriate, enter a link to the “Campaign” that is identified as the primary motivation for the donation.

VI. If desired, add “contact role” records using the related list located near the bottom of the donation page layout

“Contact Roles” represent the association of one or more contacts with the donation. You can use contact roles to indicate which persons played important roles in a donation, who gets a soft credit, who was a solicitor, who was the “initial donor” triggering a matching donation from their employer, etc.

3. Reports – general use

A) When you navigate to the “Reports” tab, reports you have recently used will be displayed.

B) Users can run any report that your administrator has shared as “public”

C) Users can store and run any reports they create for themselves

A user's “private” reports are usually NOT available for use by other SalesForce users

Only an administrator can alter a “public” report to change fields that are provided, or to change selection criteria

D) Users can open a report, run it and then "customize" it for one time use or can then save the customized version using a new report name

E) Consistent naming of reports is a big help in keeping your system of reports easy to use and understand

Probably wise that only your administrator create, name and store "public" reports designed for general use by staff.

F) It is very helpful to adopt the practice of always entering a report "description" when you save a report.

G) Selecting the correct report type is important when constructing a completely new report

SalesForce provides a lot of report types. Each of these represents a different combination of information from different information subjects in SalesForce.

It might take some time exploring the many report types before you find the correct type for a specific reporting need. Be patient during the time you're learning SalesForce.

4. Activities/Tasks

Typically, represent an action taken or planned towards a contact

Typically assigned to a user represented by a SalesForce user account

Can be established to generate automatic reminders for the assigned SalesForce user

Can indicate specific campaign, donation, organization as related to the activity

SalesForce will "archive" Activity/Task records that meet certain criteria. For instance, Tasks that are over a year old. Search the SF online help for "archived task" for additional information. Archived tasks are typically not displayed in SalesForce reports or in "related lists".

5. Chatter

Provides discussion-type messages associated with activities of objects or persons you indicate you want to "follow".

Type of objects/monitoring provided can be customized by your database administrator.

Can use to provide:

A) General notes about what you're working on

B) Comments associated with specific account/contact records, etc.

C) Files to be shared with other Chatter users

D) Messages can include "topics" that all users to quickly view a list of only/all messages making use of that topic

Topics are entered as text following a pound sign ("#")

E) Messages can include references to a SalesForce user that serve as links to that user's SalesForce Chatter profile. Can be used to provide references to persons that should be contacted in relation to a Chatter message.

6. Single-recipient emails

NOTE: Integration with Outlook, MacMail, other "email client" software, or Gmail and integration of Vertical Response, MailChimp or other bulk emailing services will probably make sending of BULK emails directly from SalesForce undesirable or obsolete. (There may still be SOME reason to send smaller volume emails directly from SalesForce if standard, previously developed email templates are to be used, etc.)

A) If you want to use a merge template for the communication, verify that an appropriate template has already been created

B) Navigate to the Contact record describing the recipient

C) Move to the “Activity History” related list

D) Verify that there is no preexisting record indicating that a similar communication has already been sent

E) Click the “send an email” button

SalesForce will provide tools for choosing an “email template” to be used with the letter.

Alternatively, you can construct an email specifically for this single communication. The text of the email will not be saved as a template

If you continue through the entire process for sending an email, SalesForce will create an “activity” record to represent the communication. You may want to check the “Activities” related list for the contact to verify that the activity is listed in the way you wish.

F) If the communication targets a member of a campaign, you may need to edit the associated Campaign Member record to update their status from “planned” to “sent” (or some similar change).

7. Single-recipient mail merge letters

NOTE: Future, planned email integration with iContact or other bulk emailing services will probably make sending of emails directly from SalesForce undesirable or obsolete.

A) If you want to use a merge template for the communication, verify that an appropriate template has already been created

B) Navigate to the Contact record describing the recipient

C) Move to the “Activity History” related list

D) Verify that there is no preexisting record indicating that a similar communication has already been sent

E) Click the “mail merge” button

SalesForce will provide tools for choosing an “email template” to be used with the letter.

Alternatively, you can construct an email specifically for this single communication. The text of the email will not be saved as a template

If you continue through the entire process for sending an email, SalesForce will create an “activity” record to represent the communication. You may want to check the “Activities” related list for the contact to verify that the activity is listed in the way you wish.

F) If the communication targets a member of a campaign, you may need to edit the associated Campaign Member record to update their status from “planned” to “sent” (or some similar change).

General tips

1. Consistent naming is important for ease of use with SalesForce

2. Search first before entering new records of any type
3. Construct useful "views" to speed access to restricted subsets of data
   A) Views can be created on nearly any tab in SalesForce
   B) Views can access and make use of only the data that is located within their own specific information area

   For example, a Contact view can specify record selection criteria using any contact field. But organization fields cannot be used for this purpose in a view created on the Contact tab.

   C) Users can create their own "views" that are not accessible to other staff members
   D) Administrators can create views that are shared among all staff members
4. Use the on-line help system enough to become good at it
5. Tip sheets on some key tasks *will be* available on the "Documents" tab
6. Staff responsibilities in using SalesForce—data is only as good as it is "up to date":

Make sure that you:

   A) Make sure any time you hear about a staff person leaving or an organization moving, that you update "Affiliations" linked to that person's Contact record in SalesForce – or email appropriate staff to make the update
   B) Make sure to add new organizations and contacts or update as you interact with them (or send to messages to designated staff to make the update).
   C) Send any lists from "group events" like webinars, annual meetings, etc. to the appropriate staff members for establishment of appropriate "campaign" records, etc.
   D) Log your interactions with contacts and organizations (particularly partners) using the Activities tab or in association with the contact/account or other SalesForce object most closely associated with the activity
   E) Make sure your staff/organizers/etc keep their lists up to date
   F) Send any ideas for improvements to your designated SF administrator (new reports, different functionality, etc)

7. Relationships between SalesForce objects may be viewed in diagram form using the "schema builder". To access the schema builder, navigate to "setup/App setup/schema builder".

Exercises

[LB – The exercised listed here have not yet been customized to match [ORG ABBREV] configuration details.]

1. Review and edit your personal profile
2. Revise the tab display within your SalesForce account to change tab order or to add/remove tabs
3. Perform several searches for organization or contact records you expect to find in the system
   A) Take a look at a few recognizable Organizations and Persons already present in the database and try a variety of searches to gain an understanding of what approaches will find those records for you.

Click on the provided links in the search results to view the records matching the search criteria. The use your browser's “back” function to return to the search results.

Try only PORTIONS of names, wildcards, etc to be sure you understand how these faster approaches work, and how they may in fact be *preferable*.

Try using email addresses, phone number, portions of mailing addresses, zip codes etc to be sure you understand the full scope of the search functions.

Salesforce “search” functions can be powerful and very helpful to Salesforce users. It’s wise to take enough time become very comfortable with these functions.

4. On the contacts tab, use the views named “TRAINING phone display” to display contacts with associated phone information.

   NOTE: I've adopted the convention of naming views designed for general staff access with a prefix of “[ORG ABBREV]...”. I find it is useful to use a naming convention like this to clearly differentiate views that have been constructed by system administrators for general staff use. I'll recommend that personal views be named with a prefix indicating the initials of the person who constructed the view. In general, only database administrators will have the authority to create views for sharing with all staff.

   A) Examine the view to be sure you know how it works and save revised copies as your personal views

      You might consider changing the displayed columns, their ordering or adding an additional selection criteria like “last name begins with 'B'”.

   B) Click on contact links displayed by the view to display contact details

   C) Use the browser “back” function to return to the displayed view

   D) Change one of the contact settings for one Contact (“Person”) field and create a view that looks for this particular setting. Confirm that the individual in question DOES show up on the results of your new view.

   E) Revert the field setting on that same record to remove the new setting you established. Then rerun your view to confirm that this individual is no longer listed in the results

   F) To gain an understanding of how the individual phone fields are linked. Edit a contact to change their preferred phone setting, then return to this view and note the change to the “phone” field.

5. On the contacts tab, use the views named “TRAINING email display” to display contacts with associated email information.

   NOTE: I've adopted the convention of naming views designed for general staff access with a prefix of “[ORG ABBREV]...”. I find it is useful to use a naming convention like this to clearly differentiate views that have been constructed by system administrators for general staff use. I'll recommend that personal views be named with a prefix indicating the initials of the person who constructed the view. In general, only database administrators will have the authority to create views for sharing with all staff.

   A) Examine the view to be sure you know how it works and save revised copies as your personal views

      You might consider changing the displayed columns, their ordering or adding an additional selection criteria like “last name begins with 'B'”.

   B) Click on contact links displayed by the view to display contact details

C) Use the browser "back" function to return to the displayed view

D) Change one of the contact settings for one Contact ("Person") field and create a view that looks for this particular setting. Confirm that the individual in question DOES show up on the results of your new view.

E) Revert the field setting on that same record to remove the new setting you established. Then rerun your view to confirm that this individual is no longer listed in the results

F) To gain an understanding of how the individual email fields are linked. Edit a contact to change their preferred email setting, then return to this view and note the change to the "email" field.

6. On the contacts and organizations tab, create some personal views (not shared with full staff) to display filtered subsets of records. Alter those views to display different columns and different orders of columns.

7. Create some test organizations

8. Run the "Training/TRAINING Org Created Today" report to see if the organizations you just created are displayed.

   A) Customize the report to display a date range that excludes the date when you created your new records

   B) Customize the report to display only those organizations with a specific letter starting their name

   C) Create a customized version of the report for your own use which adds or removes columns from the display

9. Create some test organizational contacts linked to the test organizations you created

10. Run the "Training/TRAINING Contact Created Today" report to see if the contacts you just created are displayed.

11. Create a new contact who is of interest only as an individual rather than as an organization contact.

    You'll typically do this by creating a new contact WITHOUT specifying an Organization during your record creation. [LB – NPSP automation will automatically create an "Organization" record with record type "Household Account" and will link the Contact record to that "household account" record.

12. On the contacts tab, use the "TRAINING Phone Display" view.

    A) Enter additional phone numbers on one of these contacts, change the "preferred phone" setting and then display the view again to see the effect on the "phone" field.

    B) Create a similar view which instead displays contact with last names starting with a different letter.

13. Spend some time creating your own custom reports (store them in your own "personal reports" folder) that might be useful to you.

    It takes a little time to become adept at constructing SalesForce reports. Allow yourself a little familiarization time to learn their use before you face important reporting deadlines. You'll probably need to examine the data available for display in various report types to start gaining a clear understanding of how to use report types and to understand WHICH report types are likely to be useful to you...