Table of Contents

About the User's Guide 3

About the Salesforce Template **3**

Getting Salesforce Help and Training **3**

Salesforce.com Resources 3

Contacting Salesforce.com Support 4

Contacting NPower 4

Getting Started **5**

Finding Your Way Around Salesforce 5

Calendar and Tasks 5

Dashboards 6

Salesforce Data Model Overview **6**

Accounts **7**

Contacts **9**

Viewing Contacts 9

Creating New Contacts 9

"Preferred" Picklists for Email, Phone, and Address 11

Tracking Contact Activities 12

Deleting or Inactivating Contacts 13

Merging Duplicate Records 13

Households **14**

Opportunities **15**

Managing Opportunities 15

Record Types and Opportunity Stages 16

Tracking Donations 16

Pledges and Payments 18

Thanking Donors 20

Contact Roles for Opportunities 21

Cloning Opportunities for Next Year 22

Donation Tools 22

Task Reminders 23

Volunteers **23**

Leads and Lead Conversion **25**

Reports **26**

Viewing Reports 26
Filtering and Customizing Reports 28
Creating Your Own Reports 28
Campaigns **28**
Creating a Campaign 28
Mailing Campaign Members 29
Emailing Campaign Members 36
Email Communications Templates **36**
Print Communications Templates **37**
Installing Connect for Office 37
Create a Merge Template for Word 37
Add a Merge Template to Salseforce 39
Use a Mail Merge Template to Create a Thank You Letter 40
Administering Your Salesforce Database **41**
User Administration and Permissions 41
Updating Picklist Values 42
Screencasts **45**

About the User's Guide

This training manual introduces the general organization of the NPower Seattle Salesforce database, describes the special customizations we made, and provides basic procedures.

This User's Guide does not cover the standard features of Salesforce.com. All users should take free online training from Salesforce and read online help for the areas of the program they need to use.

About the Salesforce Template

In 2006, NPower Seattle consulting staff selected Salesforce.com as a new platform to support the database and Constituent Relationship Management (CRM) needs of our nonprofit clients. We chose Salesforce.com for several reasons:

• It is a reliable web-based service that runs in nearly any web browser, eliminating the need for costly hardware
• The Salesforce Foundation donates 10 free Enterprise licenses to any nonprofit organization, making Salesforce a very good value for most nonprofit uses
• The Salesforce platform is robust, easy to learn, and highly customizable
• Many nonprofit technology providers are using Salesforce, creating a strong community around nonprofit solutions

In collaboration with other nonprofits, NPower Seattle has developed a standard set of customizations that help transform the normally sales-centric system into a donor management platform. For each organization we work with, we further customize the database to meet their unique needs for fundraising, client management, program tracking, and reporting.

Note: This manual covers the NPower Seattle Template for Salesforce.com, which can be installed (with permission) only from www.npowerseattle.org. Our Salesforce template is the result of extensive experience with nonprofit databases, and includes robust tools to manage households, donations, pledges, payments, and events.

The NPower template is similar to the Nonprofit Starter Pack and the (pre-12/2008) Nonprofit Template offered by the Salesforce Foundation, but includes a slightly different data model and a richer set of tools. All three of these options are built atop Salesforce.com Enterprise Edition, for which the Foundation donates licenses to nonprofits.

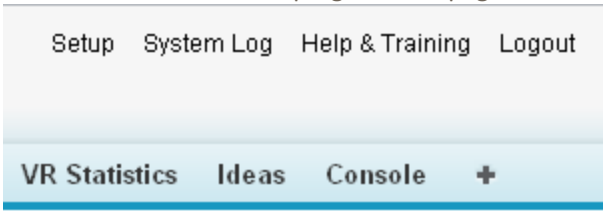
Getting Salesforce Help and Training

Salesforce.com Resources

Salesforce.com offers free online training to logged-in users. The online help system is also very good. Most Salesforce pages have a help topic associated with them, or you can search help for any topic.

For help on the current page:

- Near the top right of the page, click **Help for this Page**.



To browse or search Help:

1. At the top right, click **Help & Training**.

The Help window appears.

2. Click topics in the list at left, or type keywords in the **Search** box and click **Go**. (Search displays “Relevant Solutions” by default. To see topics for your search, click **Relevant Help Topics**.)

As a Salesforce subscriber, your organization is entitled to free high-quality support from Salesforce.com.

Contacting Salesforce.com Support

To view online training:

1. At the top right, click **Help**.
2. Click the **Training** tab.
3. In the **Select Your Role** box, select **Marketing Administrator** and then click **View Classes**.
4. Click classes in the Recommended Classes list.

To request customer support:

1. At the top right, click **Help**.
2. Click the **My Cases** tab.
3. Click **Log a Case**, and then fill out the request form.

A Salesforce support rep will contact you, generally within one business day.

Contacting NPower

If you have questions about the Salesforce customization we’ve done or need additional consulting services, please contact NPower Seattle. Email consulting@npowernw.org.

Getting Started

Finding Your Way Around Salesforce

Open Internet Explorer, Firefox, or Safari, and then log in to Salesforce at http://login.salesforce.com.
Your home page shows your personal calendar and tasks that are assigned to you, and the bar on the left helps you find or navigate to objects throughout your database.

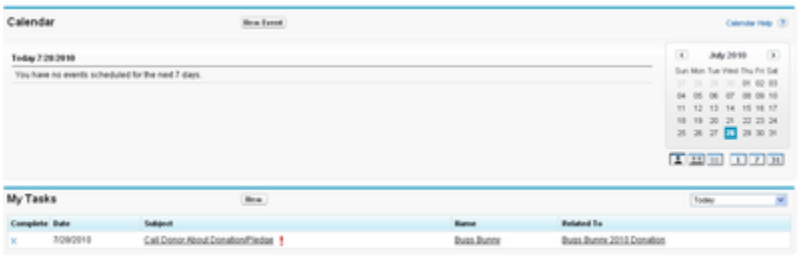
Salesforce organizes data on tabs, each of which represents a type of "object" in Salesforce or a custom tool NPower has created to help you do your work. The tabs that you see depend on the permissions defined in your *user profile*, as well as any additional custom objects that we may have created for your organization.

The following table describes the tabs you are most likely to see:

Tab	Description
Home	Shows your personal Salesforce calendar and task list, and the predefined "Dashboard" you select.
Contacts	Shows all contacts in your database—donors, volunteers, clients, primary contacts at foundations, vendors, and other organizations—and provides tools for managing them.
Accounts	Shows all organizations, foundations, and companies.
Opportunities	Tracks all past donations, grants, memberships, and volunteer assignments. More importantly, helps you track opportunities to get more donations in the future.
Campaigns	Tracks special events, mailings, or appeals for money. Every campaign has Members, which represent the people who are contacted for the appeal or invited to the event. By associating opportunities with a campaign, you can track the effectiveness of campaigns over time.
Leads	Tracks people that you import from a list, people who sign up in a form on your website, and online donations.
Lead Converter	Custom tab that helps you convert leads into contacts, households, organization accounts, and opportunities, ensuring that no duplicate records are created.
Reports	Lists predefined reports for viewing data or exporting to Excel; also allows you to create your own custom reports from any data in Salesforce.
Dashboards	Allows you to define a group of summary reports and charts to provide an overview of data, such as donation history or future opportunities.
Documents	Stores logos, letterheads, and documents that you use in correspondence with your constituents.
VR Email	Allows you to send bulk email via Vertical Response, a third-party tool.
VR Statistics	Allows you to analyze past email you've sent via Vertical Response and import email results and statistics back into Salesforce.
Ideas	Helps you track employee ideas for improving your organization, its services, and its impact.
Console	Special screen layout that allows you to browse a list of contacts, opportunities, or activities and perform actions on several records at once.

Calendar and Tasks

Your home page displays events and tasks assigned to you. The **1**, **7**, and **31** buttons display daily, weekly, and monthly calendar views. You can add events and tasks individually, they can be assigned to you by others, or they may appear automatically because of rules created in Salesforce (for example, we've told Salesforce to create automatic tasks for sending thank you notes).



To add an event to your calendar:

· Click **New Event**, enter information, and click **Save**.

To mark a task complete:

· To mark a task complete, click the **X** at the left and then click **Save**.

Dashboards

At the bottom of the home page is the Dashboard, which displays snapshots of data in your database. There are several dashboards predefined for you:

Dashboard	Description
Donation History	Past donation summary
Revenue and Forecasting	Colorful gauges that illustrate progress toward your goals
Adoption Dashboard (administrators only)	Illustrates your organizations use of Salesforce, such as the users who have logged in or failed to log in and the new information added to Salesforce
VR Email History	Vertical Response email statistics

Note that dashboards do not always display the most recent data. To display current values, click Refresh (it takes a minute or so). You can also schedule dashboards to refresh automatically once per day, week, or month; in fact, your database consultant may already have scheduled them for refresh.

To display a different dashboard on your home page:

1. At the top of the Dashboard, click **Customize Page**.
2. Select a different Dashboard, and then click **Save**.

You can create or customize your own dashboards to summarize any information in the database. For information, search Help for "Dashboards."

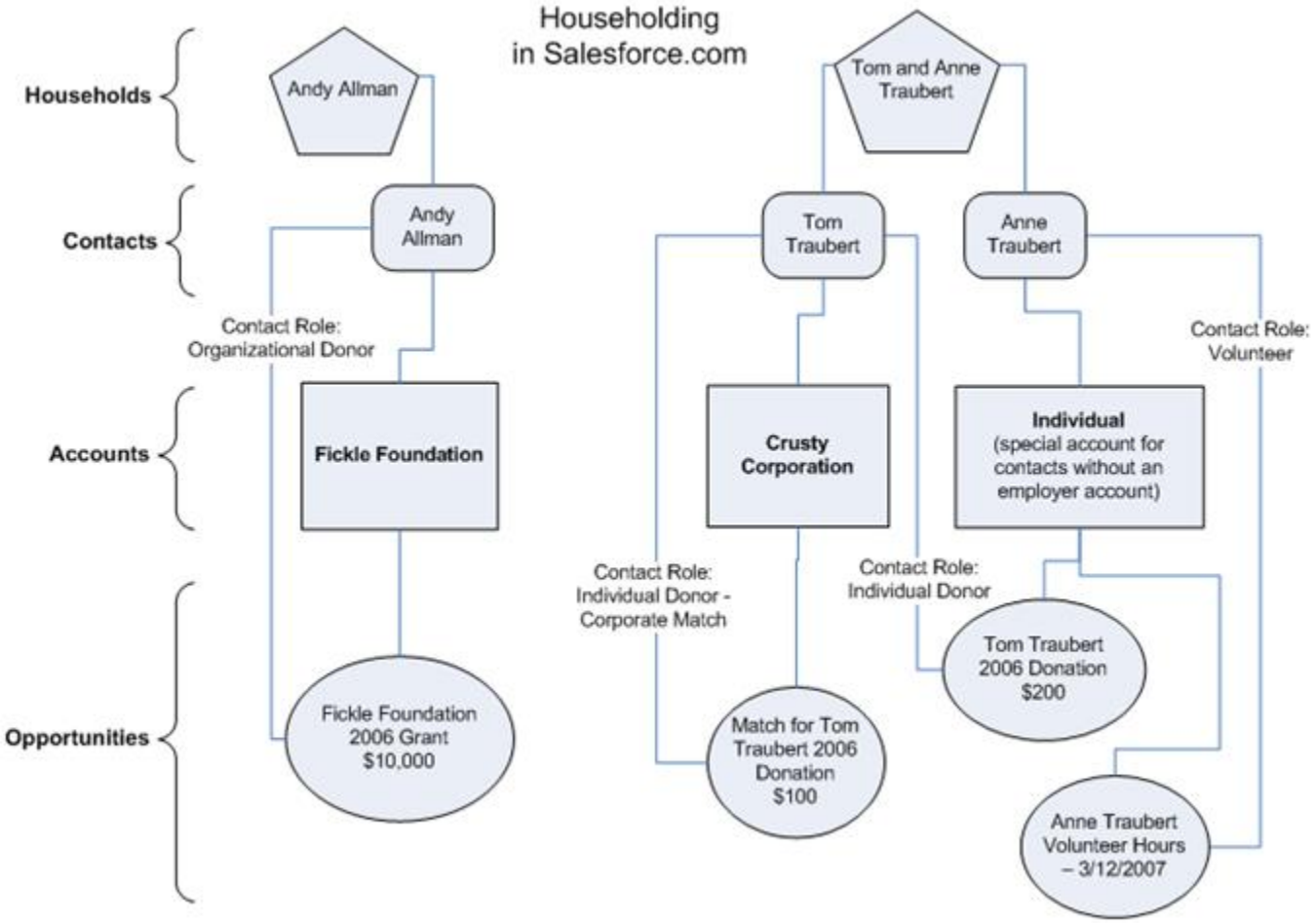
Salesforce Data Model Overview

Salesforce was designed to work best with business-to-business relationships, not business-to-individual relationships which are more common in the nonprofit sector. For example, all contacts must belong to an account, usually that of their employer. Opportunities (such as donations) must also belong to an account, not directly to a contact. Moreover, no standard object allows you to model important relationships between contacts, such as those who live in a single household.

To work around these limitations, NPower has customized Salesforce in the following ways:

- Added a custom **Household** object that contains all contacts that live at a single address.
- Created a special account, called *Individual*, which contains any contacts whose employer isn't an account in your database.
- Provided **Opportunity Contact Roles** that you can use to connect donations to the donors that make them.
- Created custom buttons, tabs, reports, and program code that help you enter and maintain data consistently in this custom data structure.

To get the most from your Salesforce database, it is important to understand the relationship between these primary objects: Contacts, Households, Accounts, and Opportunities. The following diagram shows how a few sample records might be associated in your database:



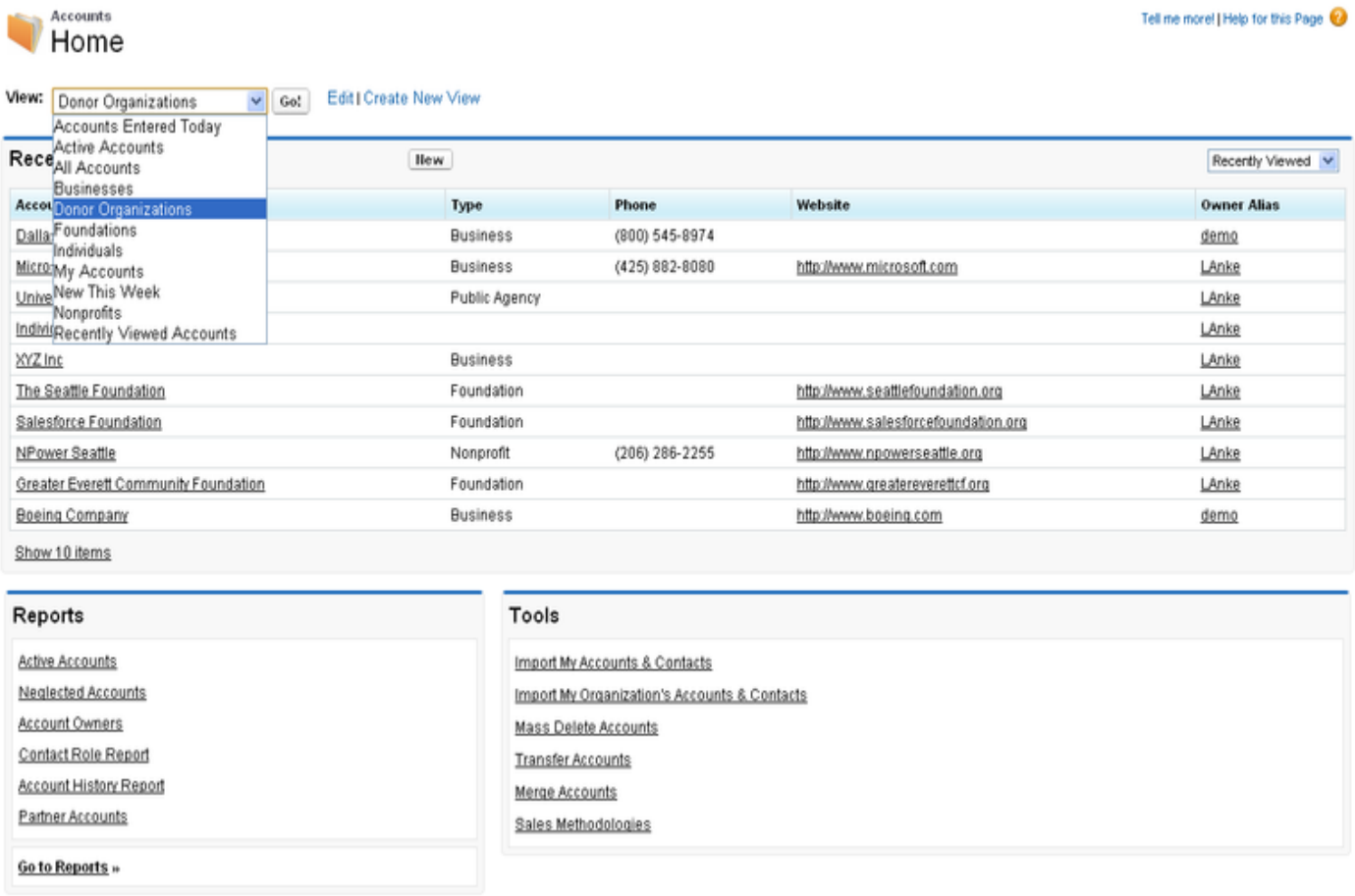
Accounts

Every organization in your database has its own Account. You use accounts to:

- Store each organization's address and other details
- Associate contacts with their employers
- Associate donations and grants with a company, foundation, or other organization

In addition to accounts for companies and organizations, there is also a special account called *Individual*. The Individual account is a container for contacts who don't have an employer that's stored in Salesforce and for donations that are from an individual's own funds.

On the Accounts tab, you can use the **View** box to filter accounts to the subset you want to see.



To open an existing account, type its name in the Search box, press Enter, and then click the account name (or click the underlined account name in any list). When viewing an account record, scroll down to display the list of contacts, opportunities (donations), and activities that belong to that account.

Before you can add contacts or opportunities for an organization, you must create an account.

To create a new account view the screncast or:

1. Click the **Accounts** tab, and then click the **New** button.
2. Enter an account Name, Type, and other details, and then click **Save**.

Tip: Be aware of the user who *owns* each account record; it is shown in the Account Owner field. Salesforce manages permissions and displays records in reports based on account ownership. By default, you own the accounts that you create. Account owners and administrators can transfer ownership of accounts to another user.

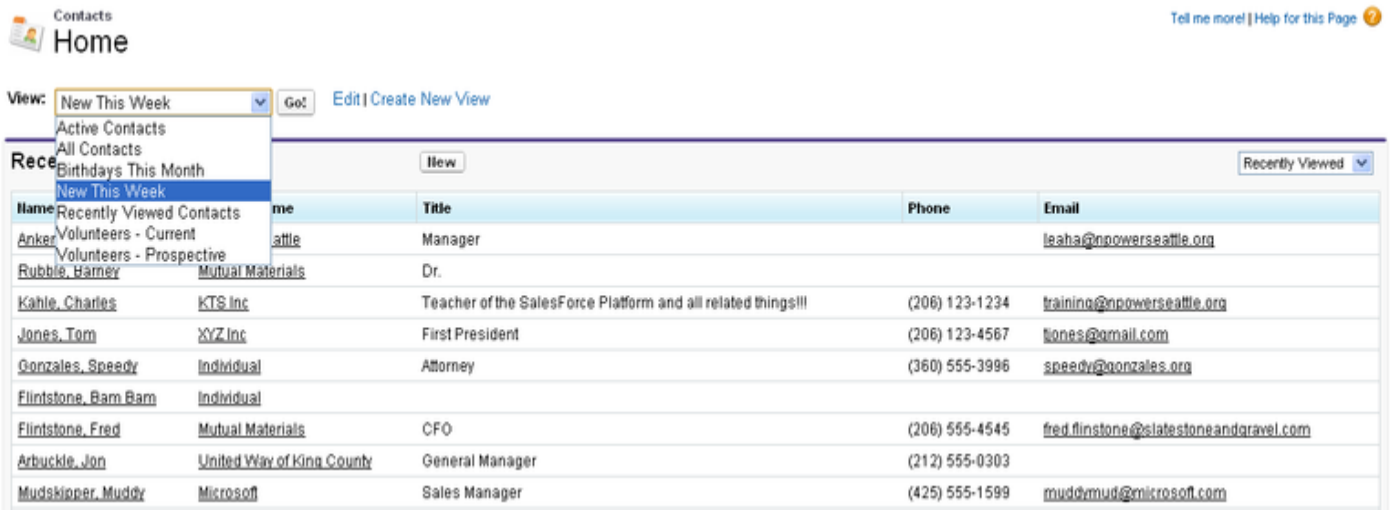
Contacts

Viewing Contacts

Every person you track in Salesforce.com has a Contact record. You use contacts to:

- Store each person's phone, email, and personal information
- Track activity history, such as phone calls and emails
- Relate people to their donations
- Include people in *Campaigns*, such as special events, direct mailings, or email campaigns

The Contacts tab provides tools for viewing, finding, and communicating with contacts. For example, you can define your own views that display a subset of contact records. Click any contact name to open the individual contact record.



To open an existing contact record:

1. Click in the Search box, type the person's name (or any part of it), and then press Enter.

Salesforce displays a list of contacts, households, and other records associated with that name.

2. In the Contacts list, click the name of the contact.

3. Scroll down on the contact page to view related items such as Activities (phone calls, letters, emails, meetings) and Opportunities (donations).

Tip: As you use Salesforce.com, you may notice that you frequently return to the same page again and again. To save time, it is a good idea to use the "tabbed browsing" feature in Firefox or IE7. For example, you might want to have a contact record and that person's account or household open at the same time. Or, when looking at a list of accounts or contacts, you can open every record you want to examine in its own tab. This way, the original list stays open—you don't have to click the Back button and wait for the list page to appear again.

To open a link in a new tab, hold down the Ctrl key while clicking the link.

Creating New Contacts

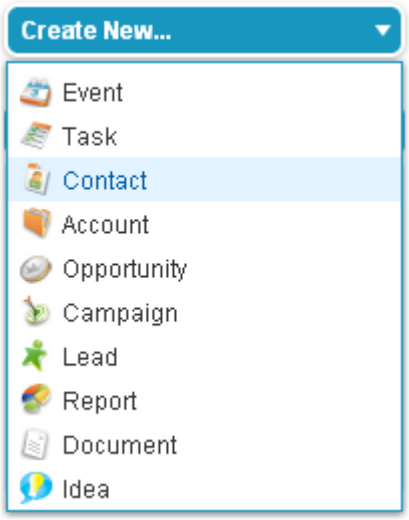
Since every contact should belong to an account and a household, it is important that you create these objects for each new contact or attach the contact to existing ones. To make this task easier, NPower has created a custom **New Contact** page and installed program code that creates a household automatically.

View the screencast or instructions below.

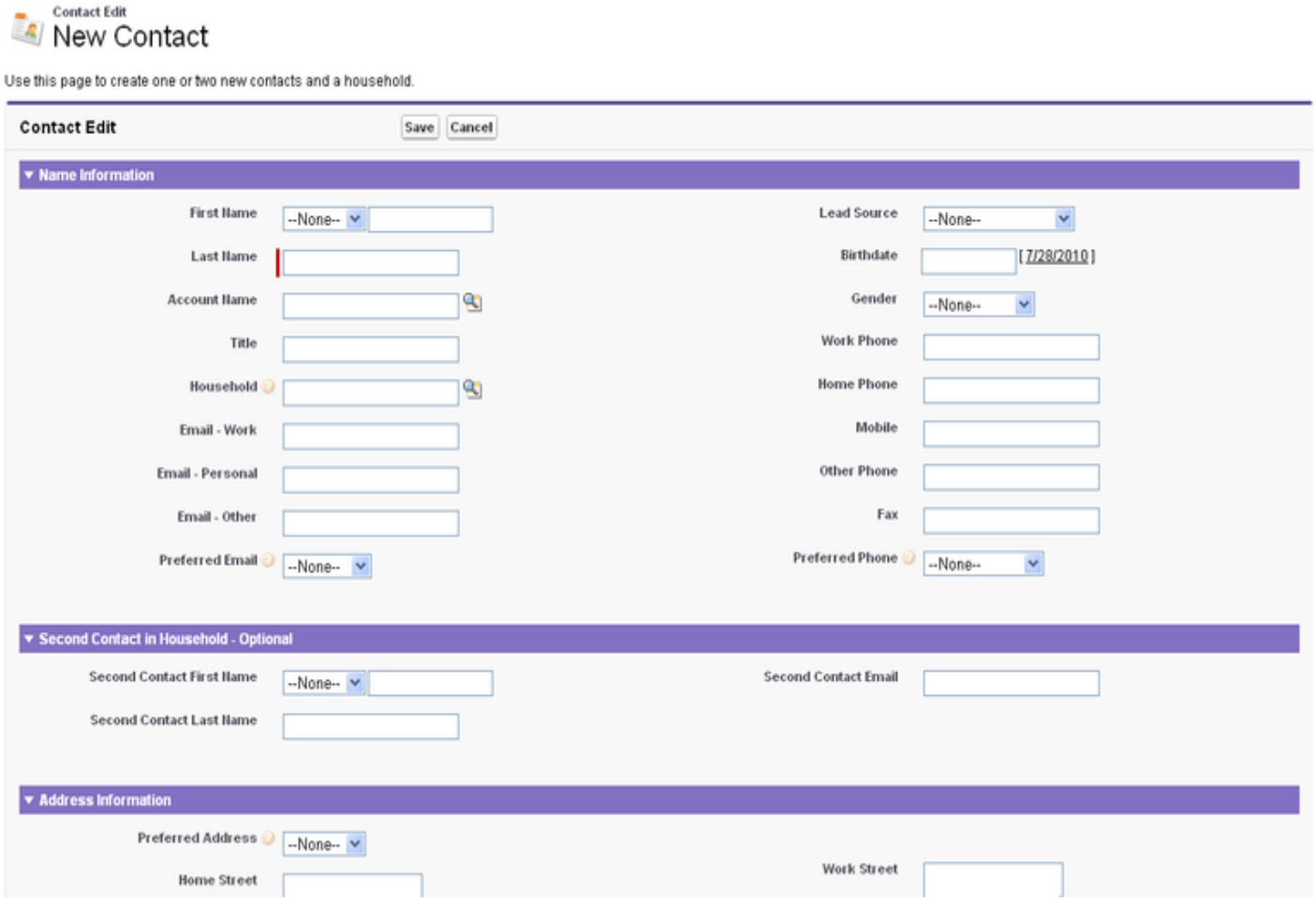
To create a new contact and household:

1. If you know the person's employer, open or create the employer's account record. To place the new contact in the Individual account, skip this step. (For additional information, see "Accounts" later in this guide.)

2. Click the Create New list in the sidebar at left, and then click **Contact**.



The New Contact page appears.



3. To add your new contact to an existing household in your database, fill in the Household field (or click the lookup button next to the field to search for the existing Household name).

4. Fill out the rest of the form, and then click **Save**.

The custom page creates a new contact record (or two) and a new household record. If it recognizes the Zip Code you provide, it also fills in the proper city, state, and county.

Tip: When adding new contacts, it is important not to create duplicate records. The New Contact page helps you here—if you enter a contact name that already exists in the database, you'll see a warning message underneath the name fields. The warning message includes a link to the existing contact record.

"Preferred" Picklists for Email, Phone and Address

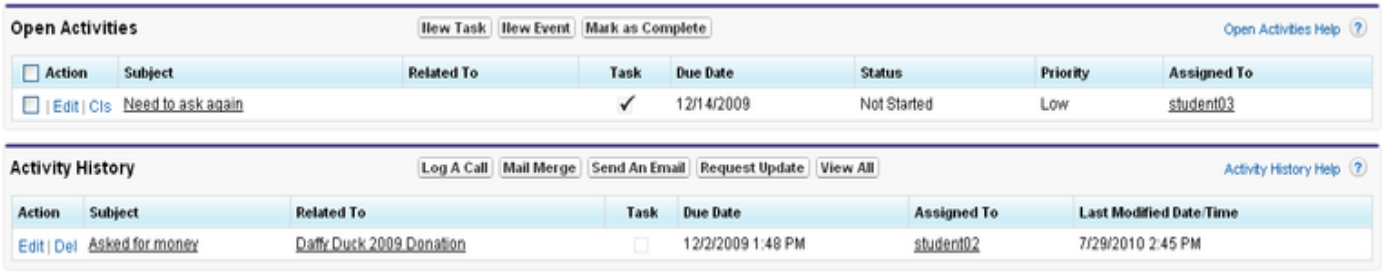
Because nonprofits contact their constituents in a variety of ways, NPower has created custom fields and code to manage work, home, and other methods of contact.

When you create contacts, you can provide up to two addresses (home and work), three email addresses (home, work, and other), and four phone numbers (home, work, mobile, and other). The Preferred Email, Preferred Phone, and Preferred Address picklists indicate which entry you will use most frequently. If you enter just one option, the "preferred" picklist is automatically set to that option.

Note: Although you use them in the same way, these picklists have a slightly different effect for address than they do for email and phone. Salesforce has standard fields for Phone and Email, which it uses to help you communicate with contacts. When you save a contact record, our custom code automatically copies the "preferred" email and phone values to the standard Email and Phone fields. For addressees, there are a set of custom "Primary" address fields (Primary Street, Primary City, etc.) for use in direct mailings and mailing labels. These are calculated fields that automatically show the address type you select as Preferred.

Tracking Contact Activities

When you call, write, or email a contact in the database, you should always create an *activity* attached to the contact record. This is easy to do, and it will allow you to keep a record of your interaction with people over time. Completed activities are displayed in each contact record in the Activity History list.



Salesforce makes it easy to log activities as you do them.

To log a call, letter, or other activity:

1. Open the person's contact record.

2. At the top of the Activity History list, click **Log a Call**.

3. Change the call Subject, if desired.

4. Type comments in the Comments box, and then click **Save**.

The activity appears in the Activity History list.

Tip: If you plan to call the same contact again later (perhaps you had to leave a message), use the same form to create a future "follow-up" task.

Sending and Logging Email

You can send email from Salesforce and log it at the same time.

To send and log an email:

1. Open the person's contact record.

2. At the top of the Activity History list, click **Send Email**.

3. Fill out the form, and then click **Send**.

Salesforce sends the email and adds the activity to the Activity History list.

Note Before sending email, be sure to customize your email signature and other settings. Click Setup > Email > My Email Settings, then fill out the form and click Save.

Entering Future Tasks and Events

You don't have to wait until the activity has happened to log it. Even if you simply *plan* to be in touch with a contact, you can create an activity—a *task* or *event*. This will add it to the contact's Open Activities list and to your personal task list or calendar. And when you mark the activity complete, it will appear in Activity History.

To create a task or event:

1. Open the person's contact record.
2. At the top of the Open Activities list, click **Log a Call**.
3. Change the subject if desired, type comments in the Comments box, and then click **Save**.

Salesforce adds the activity to the Open Activities list.

Deleting or Inactivating Contacts

To delete a contact or account from Salesforce, you would also need to delete any "child" objects belonging to that contact or account, such as opportunities (donations). In general, it is best not to delete contacts or accounts unless they are duplicate records or mistakes. Instead, edit the record and select the Inactive and Email Opt Out boxes. In reports and views, be sure to filter out records with these fields set to True so that they don't appear.

Merging Duplicate Records

From time to time, you may find duplicate records in the database, particularly if you are not careful to search for existing records during data entry.

If you find duplicate accounts or duplicate contacts within a single account, Salesforce can help you compare data and merge them. (To merge contacts that are not already in the same account, first change the account on one of them to match the other.)

You must merge duplicate household records manually. To do this, edit contact records one at a time, moving them to the household you intend to keep. Once the duplicate household has no contacts, our custom code will automatically delete it.

To merge duplicate accounts:

1. Click the Accounts tab, and then click **Merge Accounts**.
2. Type any part of the account name, check boxes next to the duplicate accounts, click **Next**, and then click **Merge**.

Salesforce combines the accounts and child objects into a single contact record.

To merge duplicate contacts:

1. Open the account record that contains duplicate contacts.
2. At the top of the Contacts list, click **Merge Contacts**.
3. Check boxes next to the duplicate contacts, click **Next**, and then click **Merge**.

Salesforce combines the data and child objects into a single contact record.

Tip: To easily check whether duplicates exist, open any contact or account record and click Find Duplicates. If more than one record appears, you may have found a duplicate.

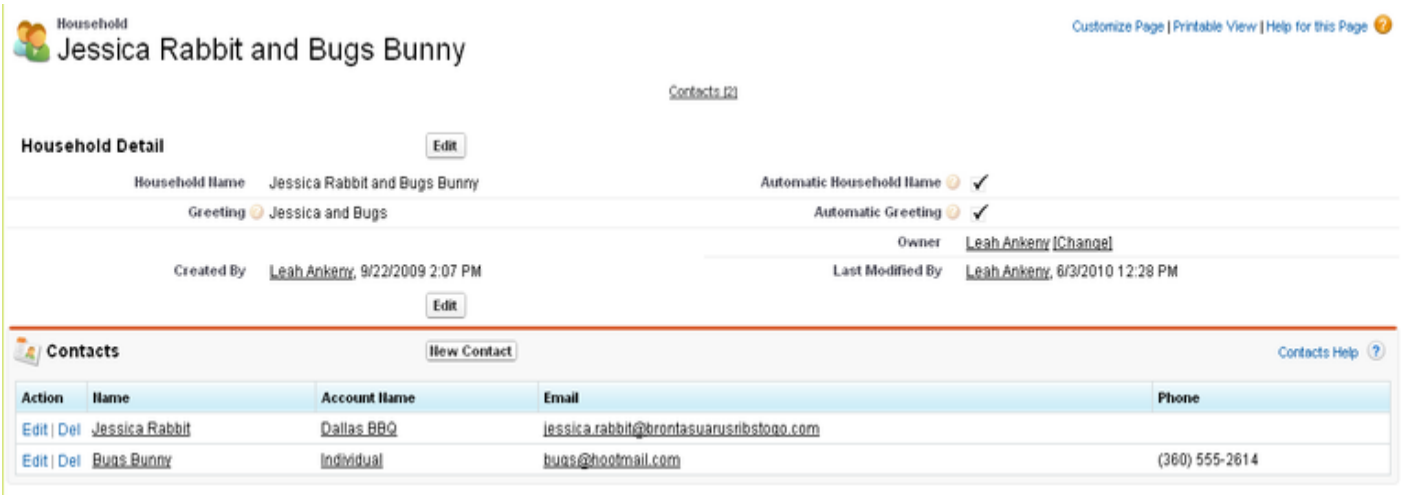
For even more help finding and eliminating duplicate records, there is a Windows-based program called DemandTools that expedites the process; contact NPower Seattle with questions.

Households

Households are a custom object NPower has created to allow you to track more than one contact at a single address and avoid sending duplicate mailings. Generally, you won't need to worry about households. The tools we've created will automatically:

- Create a household for each contact you enter
- Copy any home address you enter to other contacts in the household
- Provide a standard household name based on the members (e.g. Bill and Melinda Gates) as well as a greeting you can use in letters (e.g. Bill and Melinda)

To open a household record, open a contact in the household and then click the name in the Household field. The household record contains a few fields that help you manage the name and greeting for mailings. These names automatically appear on every contact in the household, so you can use them in mailings more easily.



To edit a household view the screencast or continue reading.

To add a new contact to a household:

1. Open the household, and then click the **New** button in the Contacts list.
2. Enter contact details (other than address) and then click **Save**.

To move a contact out of a household:

1. Edit the contact record for the person who has moved.

2. Clear the Household field, provide a new home address, and then click **Save**.

A new household is automatically created for the contact who moved.

Customizing Household Names and Greetings

In most cases, the standard household name and greeting will meet your needs. Household names are automatically created by combining the contact names (e.g. Daffy and Daphne Duck). Contacts with different last names are handled properly (e.g. Bugs Bunny and Jessica Rabbit). If the contacts in a household have Salutations (e.g. Mr. or Ms.), these are also included in the household name.

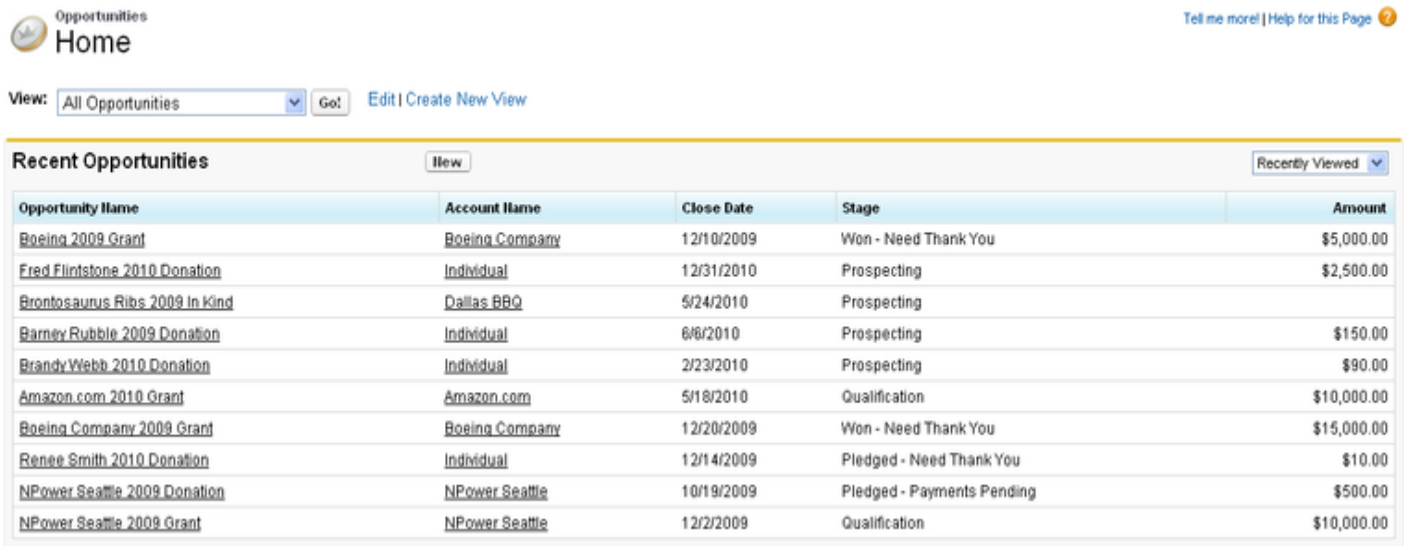
If a household has more than two members, the Household Name is automatically summarized as a family name, such as The Smith Family. However, if you want to use a family name based on just one or two of the members—for example, if the other members are children—you can edit the extra contact records and check the Not In Household Name box.

The automatic household names and greetings are for your convenience, but they are easy to override. If you want to customize the way you address letters to a specific household, you can change the Household Name or Greeting (click **Edit**, make changes, and then click **Save**), which will also cause the "Automatic" naming box to be cleared. To resume automatic naming, edit the household and check the appropriate "Automatic" box.

Opportunities

Managing Opportunities

The real power of Salesforce is in the way it helps you manage *opportunities*—donations and grants. Rather than simply keeping a record of the donations you have already brought in, the database helps you to track the donations you intend to bring in. Then, it can help you move them through the stages from "prospecting" to "in the bank."



Opportunity Name	Account Name	Close Date	Stage	Amount
Boeing 2009 Grant	Boeing Company	12/10/2009	Won - Need Thank You	$5,000.00
Fred Flintstone 2010 Donation	Individual	12/31/2010	Prospecting	$2,500.00
Brontosaurus Ribs 2009 In Kind	Dallas BBQ	5/24/2010	Prospecting	
Barney Rubble 2009 Donation	Individual	6/6/2010	Prospecting	$150.00
Brandy Webb 2010 Donation	Individual	2/23/2010	Prospecting	$90.00
Amazon.com 2010 Grant	Amazon.com	5/18/2010	Qualification	$10,000.00
Boeing Company 2009 Grant	Boeing Company	12/20/2009	Won - Need Thank You	$15,000.00
Renee Smith 2010 Donation	Individual	12/14/2009	Pledged - Need Thank You	$10.00
NPower Seattle 2009 Donation	NPower Seattle	10/19/2009	Pledged - Payments Pending	$500.00
NPower Seattle 2009 Grant	NPower Seattle	12/2/2009	Qualification	$10,000.00

This type of opportunity tracking is particularly familiar to anyone who has applied for grant funding. When you create the grant record, you have several steps to follow before you get the money: You learn about the grant and whether you qualify, prepare an application, submit it, hear whether or not you have been selected, and then finally receive one or more payments. Opportunity stages help you organize grants and other opportunities based on where they are in this process.

In general, opportunities start in the Prospecting stage and end in the Closed Won or Closed Lost stage. In practice, however, you will often enter donations for which you already have received payment; you will indicate this by marking them Won - Need Thank You or Closed Won.

Tracking future donations also allows you to monitor the *opportunity pipeline*—the amount of money you intend to raise in the coming months. As you shepherd your opportunities through stages (from 10% possibility to 100% done deal), Salesforce can do the math and provide a forecast of the revenue you can expect in any given period.

Record Types and Opportunity Stages

There are several opportunity record types; the primary ones are Donation, Major Gift, and Grant. Each opportunity record type has a different set of fields, and its own set of stages:

Opportunity Record Type	**Stages**
Donation	Prospecting
In Kind	Won - Need Thank You
Membership	*Pledged - Need Thank You**
Volunteering	*Pledged - Payments Pending**
	Closed Won
	Closed Lost
Grant	Prospecting
Major Gift	Qualification
	Preparation
	Engaged with Organization
	Under Review
	Won - Need Thank You
	*Pledged - Need Thank You**
	*Pledged - Payments Pending**
	Closed Won
	Closed Lost

** Pledged stages are optional; use them in opportunities for which payment is either delayed or paid in installments*

The stages for each type of opportunity can be customized to meet your process. If you have other types of opportunities, such as sales or fees for service, we can configure additional opportunity record types.

Tracking Donations

When you bring in donations, record them as opportunities. In addition, whenever you add a new potential donor to your database or plan to ask someone for a gift or grant, create an opportunity to track the future donation—and include it in your revenue forecast.

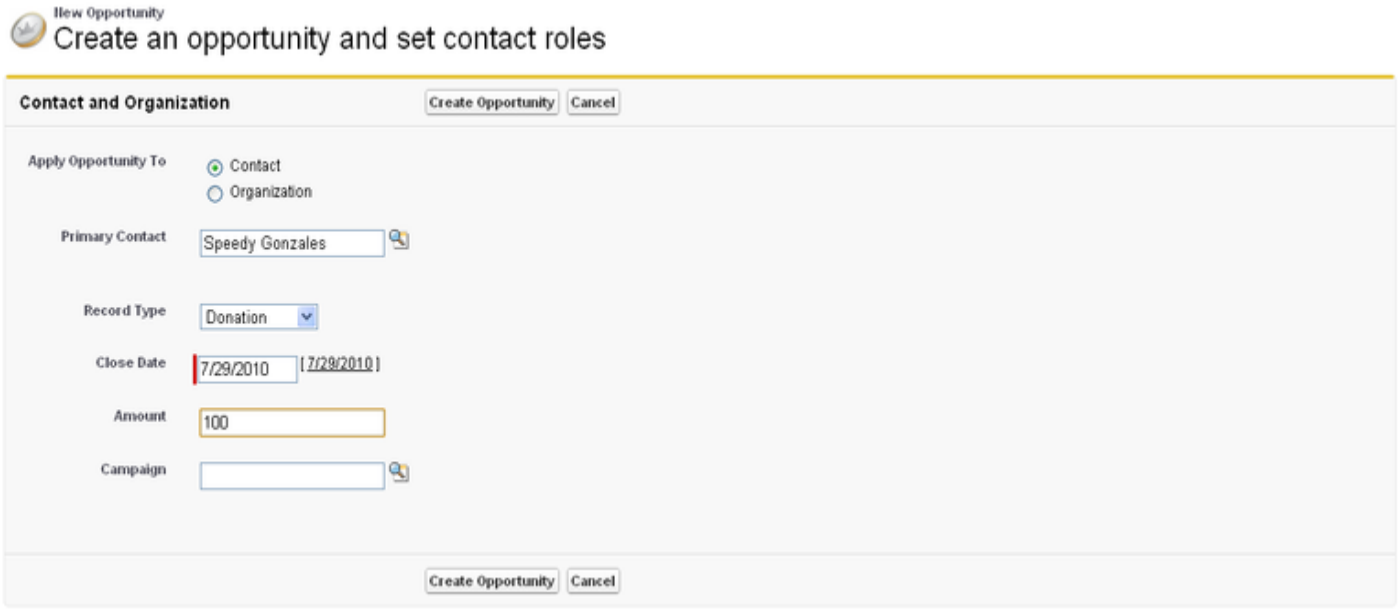
To help you record donations for individuals and organizations consistently, NPower has created a custom New Opportunity page. This page automatically gives each opportunity a consistent name
(e.g. Speedy Gonzales 2009 Donation) and assigns the proper roles to associate contacts with their donations or other opportunities. For individual donations, the custom code also assigns a special “Individual Donor – Household Member” role to other members of the donor’s household.

To create a new opportunity view the screencast or:

1. Open contact or account for which you want to create the opportunity.

2. In the Opportunities list, click the **New** button.

The New Opportunity page appears.



3. In the "Apply Opportunity To" section, click **Contact** for a personal donation or **Organization** for a donation made on behalf of the donor's employer.

4. If the proper contact isn't already selected, click the lookup button to the right of the Donor or Primary Contact box and search for the name.

5. In the Record Type box, select the opportunity type.

6. Enter a Close Date (when you received or expect to receive payment) and an Amount (optional), and then click **Create Opportunity**.

The New Opportunity page creates and displays the opportunity.

Tip: In general, it is best to associate every donation with a contact, even if the donation is from the person's organization or employer. In these cases, the contact will have a donor role such as Organizational Donor or Grant Officer, and is the person to whom you address communications about the opportunity. However, you can track an opportunity for an account without associating it with a contact.

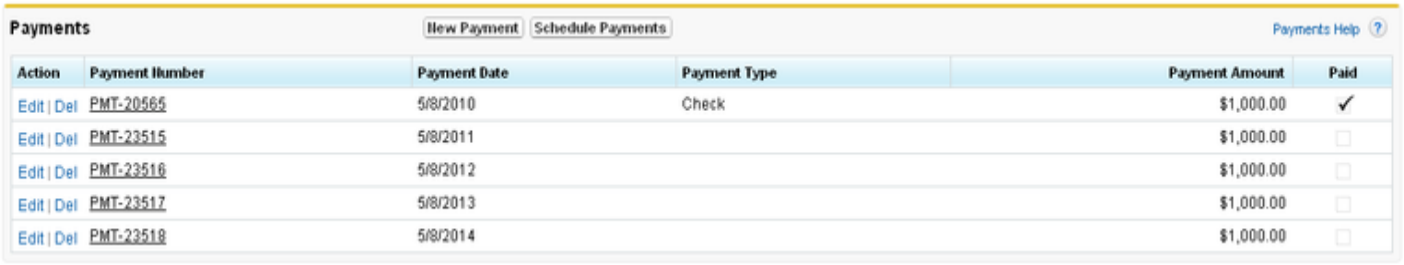
New opportunities are generally created in the "Prospecting" stage, meaning that you have yet to receive payment. If you have already received payment for a donation, edit the new record and change the stage to "Won - Need Thank You" or "Closed Won." Changing to one of these stages will automatically log a payment for the opportunity.

Pledges and Payments

Donations and grants are often pledged or promised before the funds are actually given. In addition, payment is often made in installments. In these cases, rather than creating a separate opportunity record for each payment, you can create a multiple payment records for a single opportunity.

To indicate that an opportunity is pledged but not paid in full, set the Stage field to “Pledged - Need Thank You” or “Pledged - Payments Pending.” Note that these two stages are considered to be closed and won for reporting purposes, because you no longer need to work to “win” these donations or grants. Once you have received payment in full, change the Stage field to “Closed Won.”

The payments for an opportunity, whether already paid or scheduled for future payment, are shown under the opportunity record in the Payments related list.



Whether or not an opportunity was pledged, it should include any payments made in the list; in fact, if you set an opportunity to Closed Won without any payments in the list, custom code provided by NPower will automatically create a single payment record for the full amount of the opportunity, mark it Paid, and add it to the list.

To create a pledge:

1. Create a new opportunity record for the total amount of the pledge. (For steps, see “Tracking Donations” earlier in this section.)

2. Edit the record, setting the stage to “Pledged - Need Thank You” (so your pledge record will appear in the Thank You List report) or “Pledged - Payments Pending,” and then click **Save**.

3. Scroll down to the Payments list.

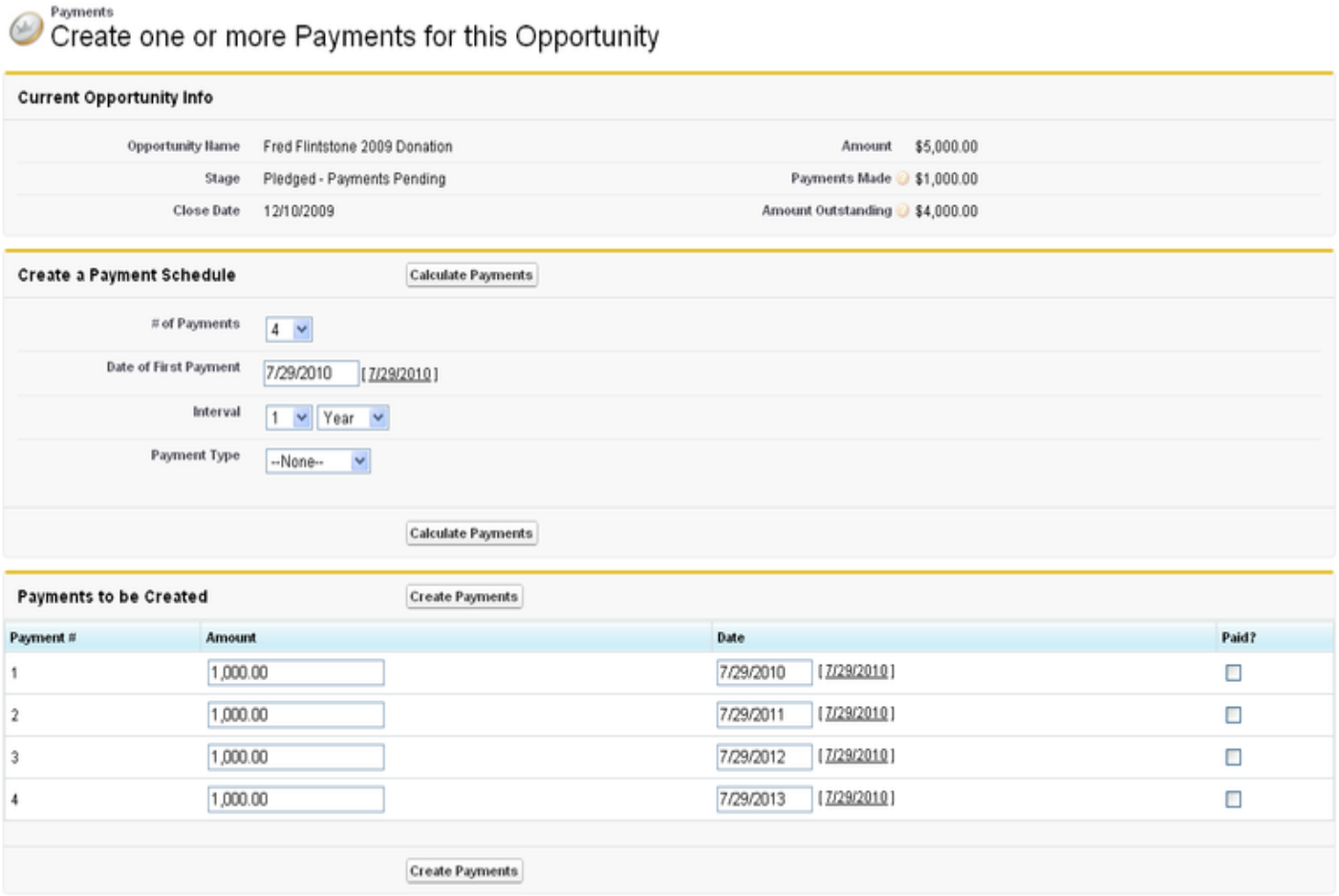
For a single payment:

- If you know when you expect payment, click New Payment, enter the payment date, type, and amount, and click **Save**.
- If you do not know when to expect payment, you don’t need to create a Payment record. When you close the opportunity, a payment is automatically created for the full amount.

For multiple installments:

1. Click Schedule Payments.

2. Enter the payment frequency and number of installments, and then click Schedule Payments.



4. Edit the payments, if necessary. If you have already received a payment, click the Paid box in that row.

5. Click **Create Payments**.

Your payments appear in the Payments list, and the Amount Outstanding field for the opportunity is updated accordingly.

To mark pledge payments as paid:

1. Open the opportunity record, scroll down to the Payments list, and click **Edit** next to the payment you have received.

2. If you have received all payments and marked them Paid, edit the opportunity record, setting the stage to "Closed Won," and then click**Save**.

Reporting on Pledges and Payments

Because payments are stored independently of opportunities, you can track both earnings and deposits, and you can report on these amounts over time. This is useful for accounting, because most organizations count pledges as earnings when the pledge is made, but still want to measure and forecast actual cash flow from donations.

To help you get started, NPower has created reports that summarize closed opportunities (earnings) as well as reports that summarize payments (cash deposits). For past payment reports as well as those that list payments that are due, look in the **Pledges & Payments** folder on the Reports tab. In addition, we've created the following custom rollup fields on the Opportunity object to help manage pledges:

- Amount Outstanding, which shows the unpaid amount
- Payments Scheduled

- Payments Due
- Next Payment Due

For opportunities that are not pledges, these fields are generally blank or zero (except for Amount Outstanding, which is the same as the Amount field for any opportunities without payments).

Thanking Donors

Sending thanks for donations is one of the most important tasks in fund development. To help you track acknowledgments, NPower has added special stages to every opportunity called "Won - Need Thank You" and "Pledged - Need Thank You." Here's how it works:

- Every time you close an opportunity for which you intend to send an acknowledgment, change the stage to "Won – Need Thank You." (If you wish, the opportunity owner or the staff person responsible for acknowledgments can receive an automatic email reminder that a thank you is needed.)
- When you are ready to send acknowledgements, create a mail merge that includes all these donors. There is a report called "Thank You List" (in the Donation Reports folder on the Reports tab) that lists all donations needed acknowledgment. This report includes mailing addresses, household names and greetings, and other fields you need to produce a mail merge.
- Once the acknowledgements have been sent, change the stage for all the donations to "Closed Won" (or for pledges that are not yet fully paid, to "Pledged - Payments Pending").

To thank donors individually:

1. Open the Thank You List report (in the Donation Reports folder) or open any opportunity in the Thank You List view on the Opportunities tab.
2. Click to open the primary contact or account that you want to thank.
3. Send acknowledgment in one of the following ways:
    - Phone or handwritten letter: Click to open the contact record for the donation. Call the person, send a personal thank you note, or both.
    - Mail merge letter (requires Internet Explorer): In the Activity History list, click Mail Merge. Select the "Thank You Letter" template. For more information on doing custom mail merges, see Print Communications Templates.
    - Email: In the Activity History list, click Send Email.
4. Once you have thanked the donor, return to the Opportunity record. Click **Edit**, set the Stage to Closed Won, and then click **Save**.

To thank several donors at once:

1. Click the **Reports** tab and view the "Thank You List" reports. If there are records shown in these reports, send acknowledgment letters or emails for each donation. (You may want to export the list to Excel and merge the mailing list into Word to print letters and/or labels.)

2. Change the stage from “Closed - Need Thank You” to “Closed Won” for each donation you acknowledged. To do this all at once, click the Opportunities tab, select the **Thank You List** view, select all the donations you acknowledged, and then click **Mark as Thanked**.

Action	Opportunity Name	Account Name	Amount	Close Date	Stage	Opportunity Owner Alias
Edit | Del	Boeing 2009 Grant	Boeing Company	$5,000.00	12/10/2009	Won - Need Thank You	demo
Edit | Del	Boeing Company 2009 Grant	Boeing Company	$15,000.00	12/20/2009	Won - Need Thank You	LAnke
Edit | Del	Bugs Bunny 2009 Donation	Individual	$50.00	12/18/2009	Pledged - Need Thank You	LAnke
Edit | Del	Henry Smith 2009 Donation	Individual	$150.00	6/2/2009	Won - Need Thank You	LAnke
Edit | Del	Jane Smith 2010 Donation	Individual	$25.00	7/1/2010	Won - Need Thank You	LAnke
Edit | Del	Jane Smith 2010 Donation	Individual	$100.00	7/5/2010	Won - Need Thank You	LAnke
Edit | Del	John Richardson 2009 Don...	Individual	$100.00	6/2/2009	Won - Need Thank You	LAnke
Edit | Del	Mary Volunteer 2009 Donation	Individual	$50.00	6/2/2009	Won - Need Thank You	LAnke
Edit | Del	Muddy Mudskipper 2009 Do...	Individual	$500.00	12/20/2009	Pledged - Need Thank You	LAnke
Edit | Del	Polly Saunders 2009 Donation	Individual	$7.00	6/2/2009	Won - Need Thank You	LAnke
Edit | Del	Polly Saunders Richard's 20...	Individual	$200.00	6/1/2010	Won - Need Thank You	LAnke
Edit | Del	Renee Smith 2010 Donation	Individual	$10.00	12/14/2009	Pledged - Need Thank You	LAnke
Edit | Del	Robin Young 2009 Donation	Individual	$100.00	12/10/2009	Pledged - Need Thank You	demo
Edit | Del	Steve Volunteer 2009 Donation	Individual	$75.00	6/2/2009	Won - Need Thank You	LAnke

Contact Roles for Opportunities

The way that NPower organizes data in Salesforce requires that you use *contact roles* to relate opportunities to donors. We have created the following contact roles that you can use to connect opportunities to contacts:

Contact Role	Used For
Individual Donor	Individual donation from contact
Individual Donor - Household Member	Soft credit for spouse or partner of an individual donor
Individual Donor - Corporate Match	Matching donation from contact’s employer
Donor Advised Funds Donor	Donation from contact’s donor advised fund
Organizational Donor (or Grant Officer)	Donation or grant from contact’s employer
Volunteer	Opportunity tracks volunteer assignments for a contact
Other Roles: Grant Team Member, Board Solicitor, Influencer, Soft Credit, Other	Contact has a secondary role in the donation or grant

When you create an opportunity, the New Opportunity page automatically creates contact roles for you. However, if you create opportunities manually or are managing a grant or other important opportunity, you may want to track additional contacts that have a role in making the opportunity successful. To do this, add contact roles.

To add contact role to an opportunity:

1. Open the opportunity.
2. In the contact roles list, click **New**.
3. Type all or part of the contact name, select a role, and click **Save**.

Contact roles have a check box called Primary. In general, every donation should have one primary contact; however, you may also want to keep track of people who have a role in a donation but aren't the primary contact.

Once you've set up roles, you can search for opportunities by those contact names, and you can print a report of opportunities and contact roles.

Cloning Opportunities for Next Year

In order to forecast future giving and provide a list of donations you are hoping to receive, you may want to create copies of each year's donations for the following year. For example, if you receive a gift for $100 in June of 2009, you may want to create a record for the same donor in June of 2010 – in the Prospecting stage – as a reminder that you intend to ask for the same amount next year.

To assist with this effort, we have created code that automatically creates a donation one year out when you close a donation record. When you close an opportunity that has the Clone Automatically When Closing box checked, a new opportunity for the same amount is created in the following year. Its contact roles are also copied to the new opportunity.

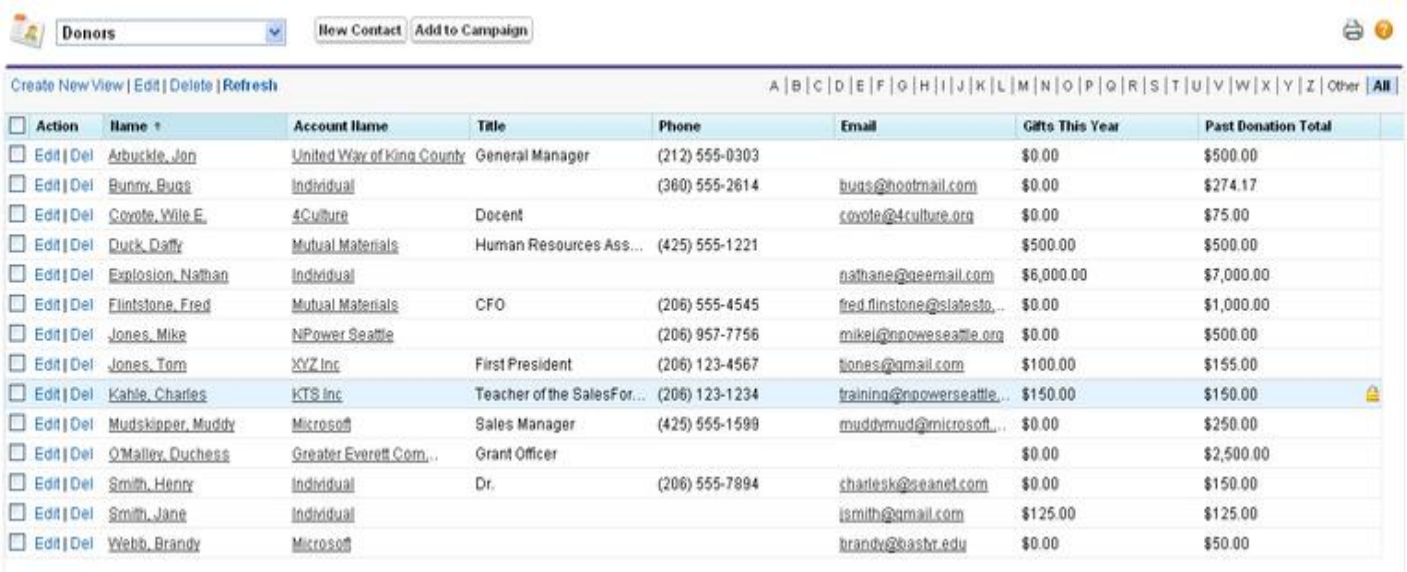
If you do not want to clone an opportunity, uncheck the Clone Automatically box before changing the stage to Closed Won. If you do not want to use this feature, your NPower consultant can change a setting so that the Clone Automatically box will be off by default.

Donation Totals

If you want to know the total amount of donations that an organization or household has given over time, you can run a report that summarizes and sums opportunities by account. However, there is no built-in way to view donation totals from within contact or account records. To address this problem, NPower created custom fields Gifts Last Year, Gifts This Year, and Past Donation Total. Whenever you "close" a donation opportunity, custom code automatically updates these totals.

The past donation fields allow you to have custom reports that compare donations between years. For example, the Donated LYBUNT (last year but not this year) report lists contacts with donations in last year's total field but not this year's.

The Past Donation Total field allows you to have a view on the contacts tab called Donors—it includes only those contacts whose Past Donation Total is greater than zero.


Donors

New Contact | Add to Campaign

Create New View | Edit | Delete | Refresh

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Name	Account Name	Title	Phone	Email	Gifts This Year	Past Donation Total
Edit | Del	Arbuckle, Jon	United Way of King County	General Manager	(212) 555-0303		$0.00	$500.00
Edit | Del	Bunny, Bugs	Individual		(360) 555-2614	bugs@hootmail.com	$0.00	$274.17
Edit | Del	Coyote, Wile E.	4Culture	Docent		coyote@4culture.org	$0.00	$75.00
Edit | Del	Duck, Daffy	Mutual Materials	Human Resources Ass...	(425) 555-1221		$500.00	$500.00
Edit | Del	Explosion, Nathan	Individual			nathane@geemail.com	$6,000.00	$7,000.00
Edit | Del	Flintstone, Fred	Mutual Materials	CFO	(206) 555-4545	fred.flinstone@slatesto...	$0.00	$1,000.00
Edit | Del	Jones, Mike	NPower Seattle		(206) 957-7756	mikej@npowseseattle.org	$0.00	$500.00
Edit | Del	Jones, Tom	XYZ Inc	First President	(206) 123-4567	tjones@gmail.com	$100.00	$155.00
Edit | Del	Kahle, Charles	KTS Inc	Teacher of the SalesFor...	(206) 123-1234	training@npowerseattle...	$150.00	$150.00
Edit | Del	Mudskipper, Muddy	Microsoft	Sales Manager	(425) 555-1599	muddymud@microsoft...	$0.00	$250.00
Edit | Del	O'Malley, Duchess	Greater Everett Com...	Grant Officer			$0.00	$2,500.00
Edit | Del	Smith, Henry	Individual	Dr.	(206) 555-7894	charlesk@seanet.com	$0.00	$150.00
Edit | Del	Smith, Jane	Individual			jsmith@gmail.com	$125.00	$125.00
Edit | Del	Webb, Brandy	Microsoft			brandy@aashr.edu	$0.00	$50.00

Note: The donation total fields update automatically as you enter and close donations. However, it is possible for the totals to become out of sync (if, for example, you change contact roles on an existing opportunity). If you suspect that donation totals

are incorrect for a given account or contact, you can cause the custom code to refresh them by changing the date or amount of any opportunity, saving your change, and then changing the value back.

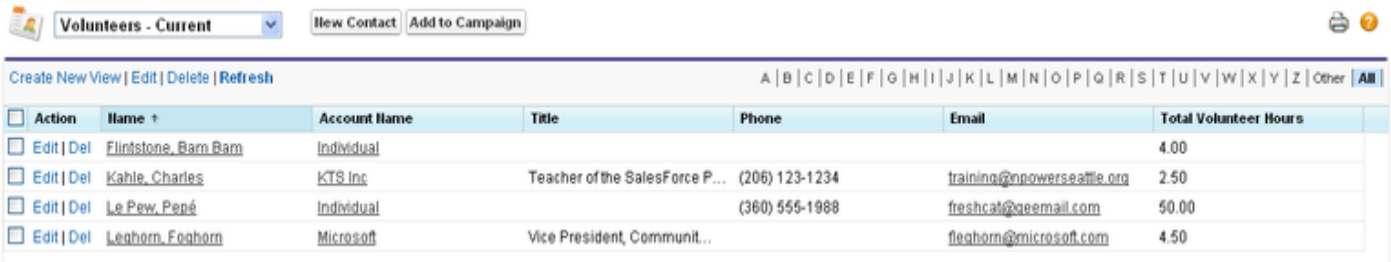
Task Reminders

Salesforce can create tasks to automatically remind you to keep in touch with your donors. For example, when you create a new grant or major gift, it can create a task for you to contact the donor about a meeting. Salesforce can also send email or display alerts to remind you of these tasks.

During the implementation, your implementation consultant set up workflow rules that create tasks whenever opportunities meet certain criteria. You can customize these rules and reminders, or create your own. For information, search Help for "Setting Up Workflow."

Volunteers

Volunteers are stored in Salesforce as contacts. To indicate whether each Contact is a volunteer, use the Volunteer Status field—it includes values for Current, Prospective, and Past volunteers. On the Contacts tab, you can use a view to filter the list of contacts who are volunteers.



You can use a web-to-lead form to accept new volunteer signups from your organization's website. When you convert volunteer leads into contacts, they are automatically given a volunteer status of Prospective.

NPower has created two ways to track the efforts of your volunteers, and you can use one or both of them depending on your needs. To track volunteer assignments or projects—which may or may not have a specific number of hours—create an opportunity with the Volunteering record type and assign it to the volunteer or partner organization.

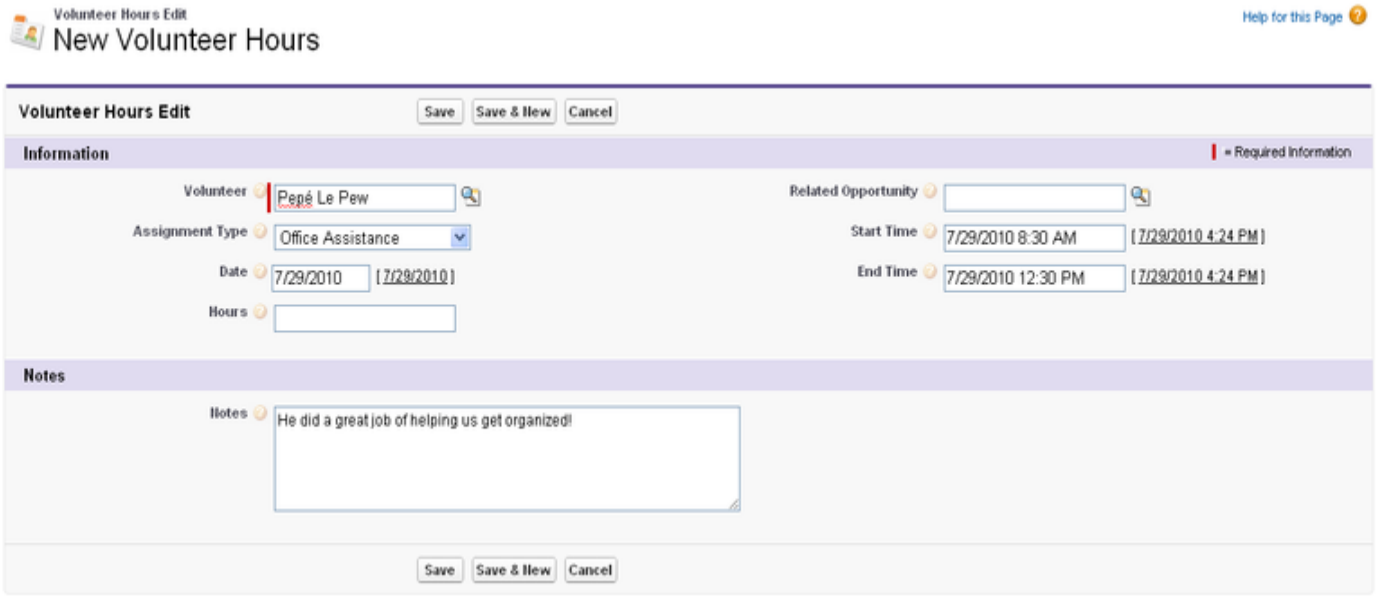
To track the specific hours that each volunteer works, use the Hours custom object. The hours you enter will automatically "roll up" to the Volunteer Hours field on each contact record, which allows you to easily filter for different levels of volunteer participation.

To enter volunteer hours:

1. Find and open the contact record for the volunteer.

2. Scroll down to the Volunteer Hours related list, and click **New Volunteer Hours**.

3. Enter the Start Time of the volunteer work and *either* the End Time or the Hours worked.



If you enter a start and end time on the same day, the Hours field fills in automatically when you save; if you enter a start time and hours, the End Time fills in automatically when you save.

4. If the hours apply to a specific project or assignment opportunity, enter it in the Related Opportunity box.

5. Click **Save**.

To view the list of volunteers, volunteer opportunities, or hours, click the **Reports** tab and open the reports in the Volunteer Reports folder.

Leads and Lead Conversion

If you want to add people or donations to your Salesforce database in a batch (from a spreadsheet, for example), you can import them as *leads*. In addition, you can enable visitors to your website to submit themselves as leads automatically through a *web-to-lead form*. You can even have several web-to-lead forms, such as one for joining your mailing list and another for expressing interest in volunteering.

The trick when bringing a list of people into your existing database is that they are often already there; rather than creating duplicate records, you'd like to merge new values into the existing records. To help you *convert* leads into contacts, NPower has created a custom tab called *Lead Conversion*. The tab automatically matches leads with existing contacts based on their name, email address, or an external ID number from another system. When converting leads into new contacts, the tab also automatically creates a household record.

This same lead import process can also be used to import a list of online donations, such as the monthly list from a service such as PayPal. If a donation amount is specified in any lead record, the Lead Conversion tab creates a new opportunity associated with the new or updated contact record.

To import a list of leads or donations:

1. Check whether your list is in Comma-Separated Values (CSV) format. If it isn't, open the file in Excel and save as a CSV file. (Be sure to include field names in the first row of your data file.)

2. In Salesforce, click the **Leads** tab.

3. Under Tools, click **Import Leads**.

4. Click **Start the Import Wizard**.

5. Follow instructions to specify a file and match incoming fields to their Salesforce counterparts. Make sure to match all fields from your list so no data is lost. For example, when importing online donations, select the name of your amount and date fields in the Donation Amount and Donation Close Date boxes.

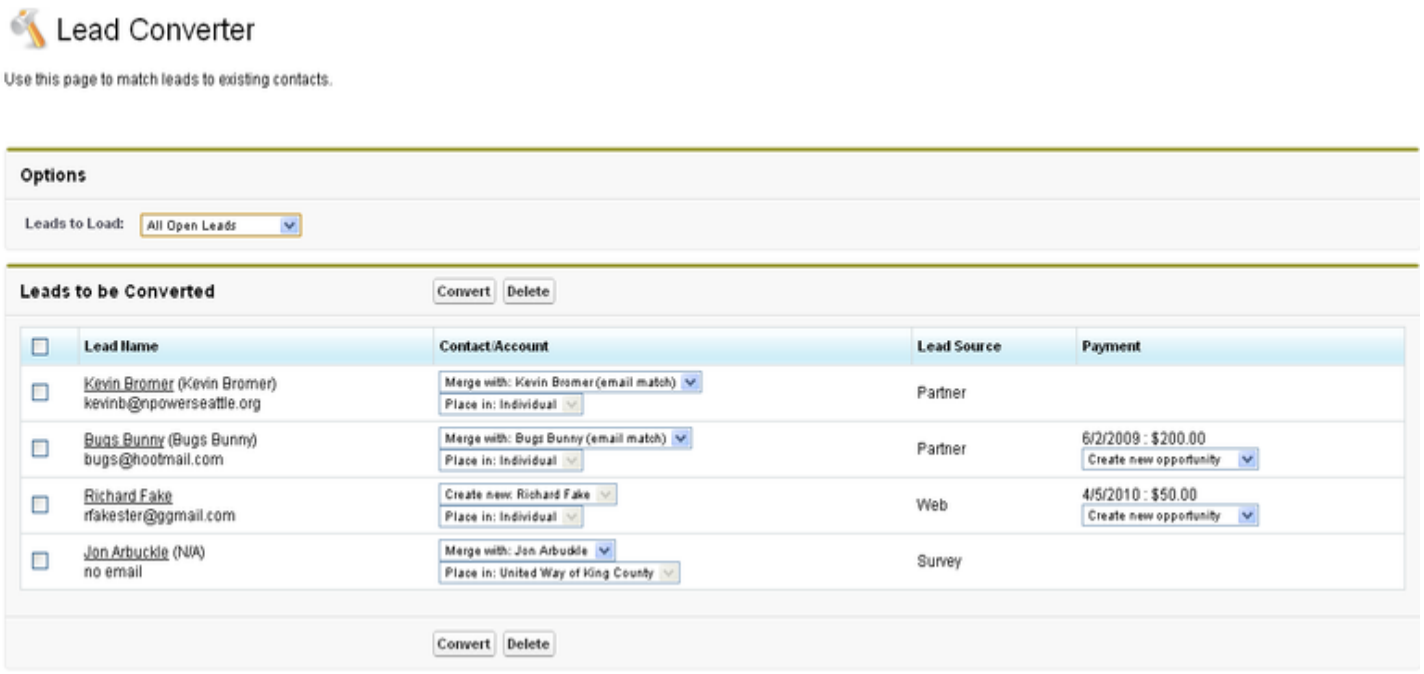
Once you've imported leads, you can return to the Lead Conversion tab to view or convert them.

To convert leads into contacts:

1. Click the **Lead Converter** tab.

2. In the Leads to Load box, select **All Open Leads** (or select a specific lead source you want to convert).

The Lead Conversion tab queries all open leads, matching them to existing contact records. Wherever the drop-down lists in the Contact and Account columns are enabled, it indicates that there is more than one possible conversion option. You can select from different options in the list, such as whether to merge a lead with an existing contact or create a new contact record.



3. Click the check box next to each lead you want to convert (to select all, click the check box in the header row), and then click **Convert**.

Once leads are converted, you can click a name to move to the new or updated contact record. If your data included donations, you can click a date or amount to open the new opportunity.

Reports

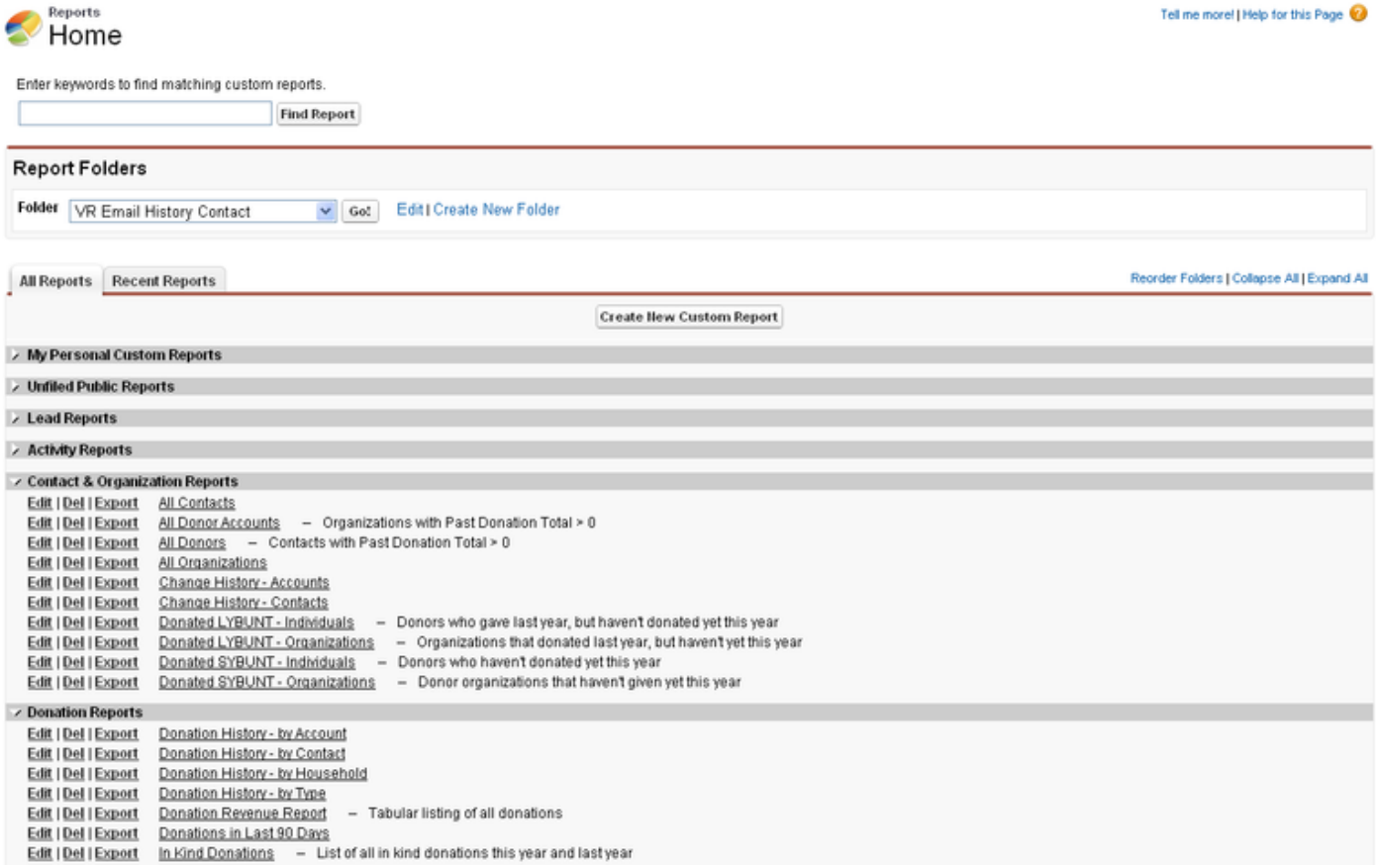
Viewing Reports

To display, summarize, or export information in your database, you use reports. NPower has created several reports and saved them into the following categories:

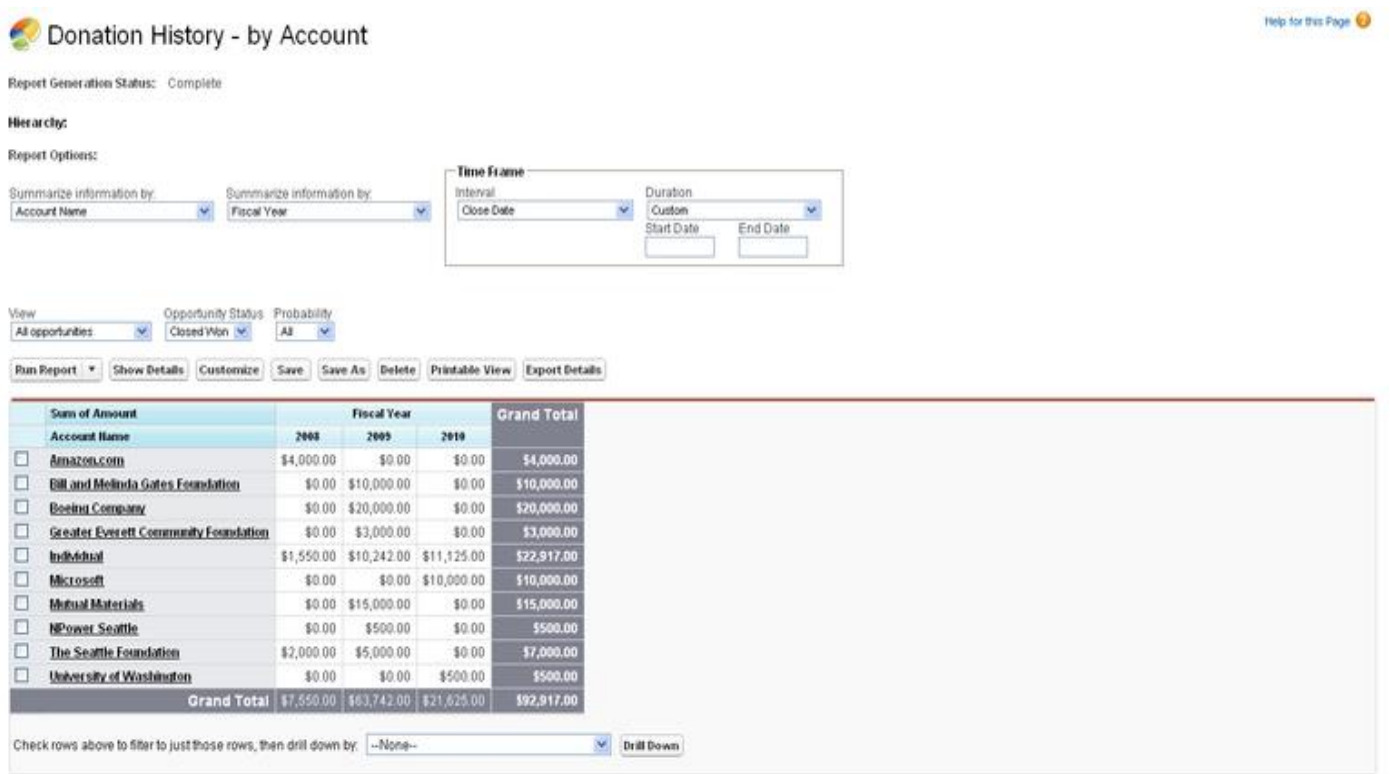
- Contact & Organization Reports
- Donation Reports
- Pledge & Payment Reports
- Campaign & Event Reports
- Mailings & Communications
- Relationship Reports

You can use these reports as is, customize or modify them to meet your needs, or create your own custom reports.

On the Reports tab, click the name of any report to open it.



To export a report, click **Export Details to Excel**. Or, to export a summary report as it is shown (without detail records, for example), click **Printable View**.



Filtering and Customizing Reports

When viewing a report, you can specify the subset of records it shows. You do this in two places:

- The **Report Options** section includes drop-down lists that help you filter the report (for your own records or everyone's records, or for a specific date range).
- Most reports also have a **Filter** section, which provides specific criteria for records to be shown (records where Inactive is not equal to True, for example).

To change the filter in Report Options, select options from the lists, and then click **Run Report**. To change other filter criteria, click **Edit** in the Filter section. To customize a report in other ways—add or remove fields, for example—click the **Customize** button. After making changes, click **Run Report** to see the result; if you like what you see, click **Save As** to save your own version of the report.

Creating Your Own Reports

You can create and save your own custom reports. Your best bet is to start with an existing report, make changes, and then click **Save As**. Alternatively, if you don't see a report that's like the one you want, you can start from scratch by clicking **Create New Custom Report**. For more information, search Help for "Reports."

Tip: When creating a report from scratch, you may find that the report shows no records or fewer records than you expect. This is often because the "Report Options" section has a filter set—by default, most new reports show only records that "belong" to you, and only records for a single quarter or year. To show all records, select an option in the View box (e.g. "All Visible Accounts") and clear the Start Date and End Date boxes.

Campaigns

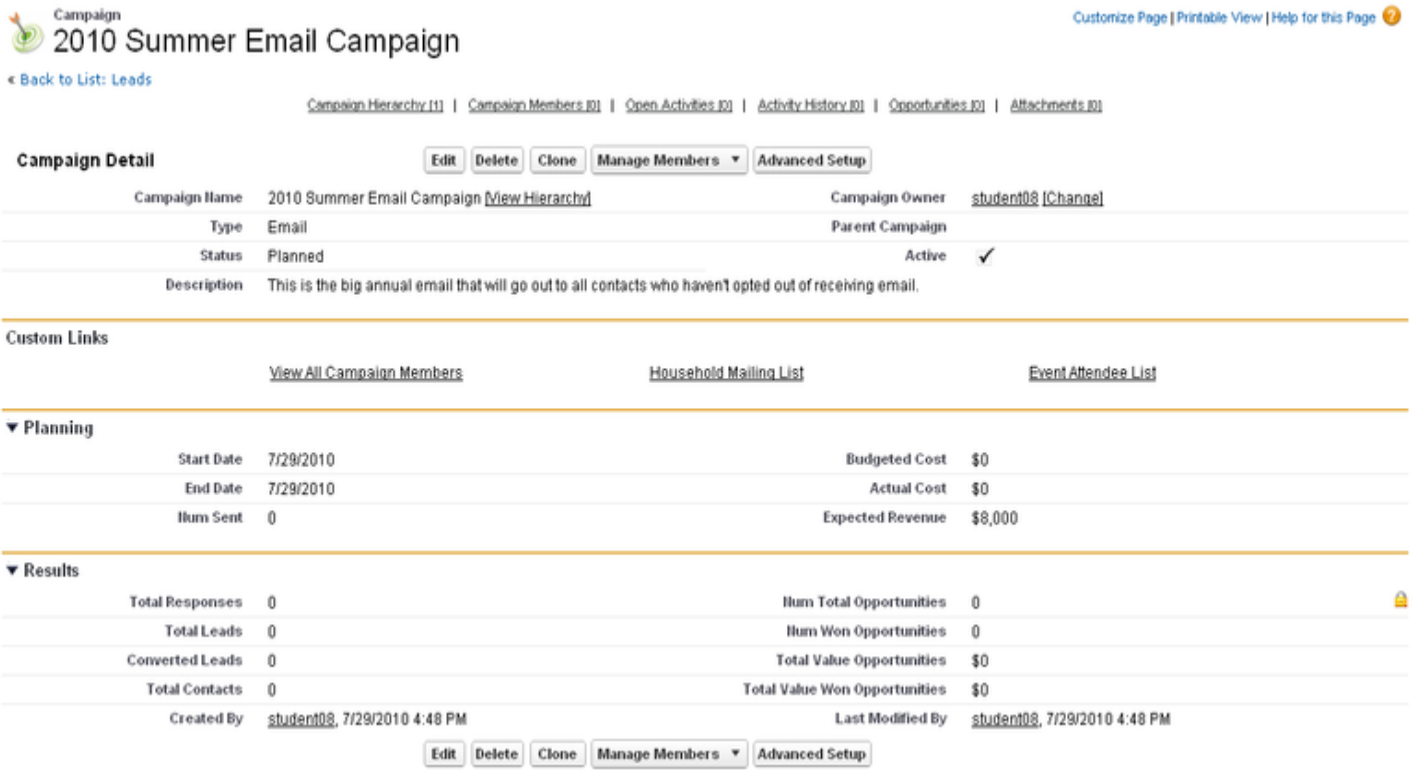
Creating A Campaign

A campaign is a way to track a mailing, email campaign, annual appeal, or special event so you can measure its effectiveness. Salesforce provides easy ways to add members to the campaign—you can add all the people listed in any view or report, for example.

You can create a hierarchy of campaigns by using the Parent Campaign field. For example, if you have a donation drive that includes mailings as well as special events, you may want to create a single parent campaign and several "child" campaigns. This makes it easy to summarize results for the campaign as a whole.

Tip: By default, the status values available for campaign members are "Sent" and "Responded." By clicking the **Advanced Setup** button in the campaign record, you can add or change status values. For example, for a special event, you might want to track several status values, such as Sent, RSVP – Yes, RSVP – No, and Attended.
To create a campaign:

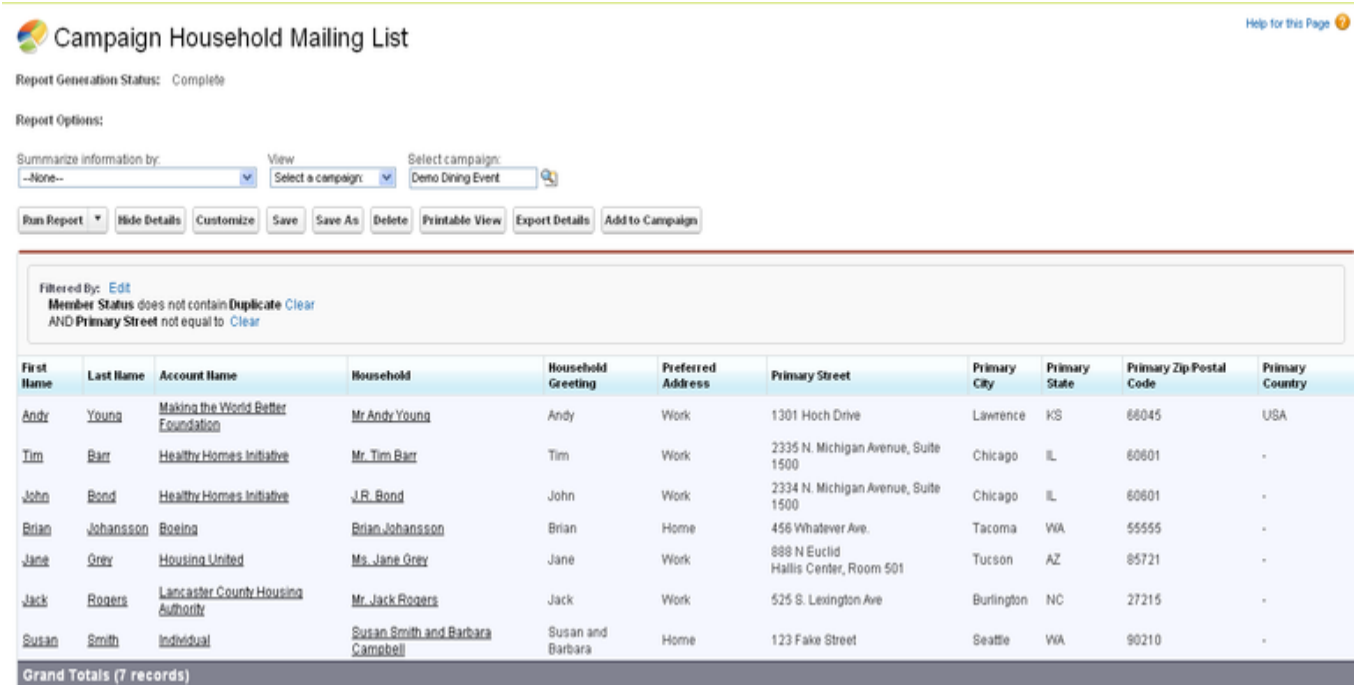
1. Click the **Campaigns** tab, and then click the **New** button.
2. Enter a name and other details for the campaign, select the **Active** box, and then click **Save**.
3. Add campaign members in one of two ways:
    - On the campaign page, click **Manage Members** and follow instructions
    - In any view or report that lists contacts, click **Add to Campaign**



Mailing Campaign Members

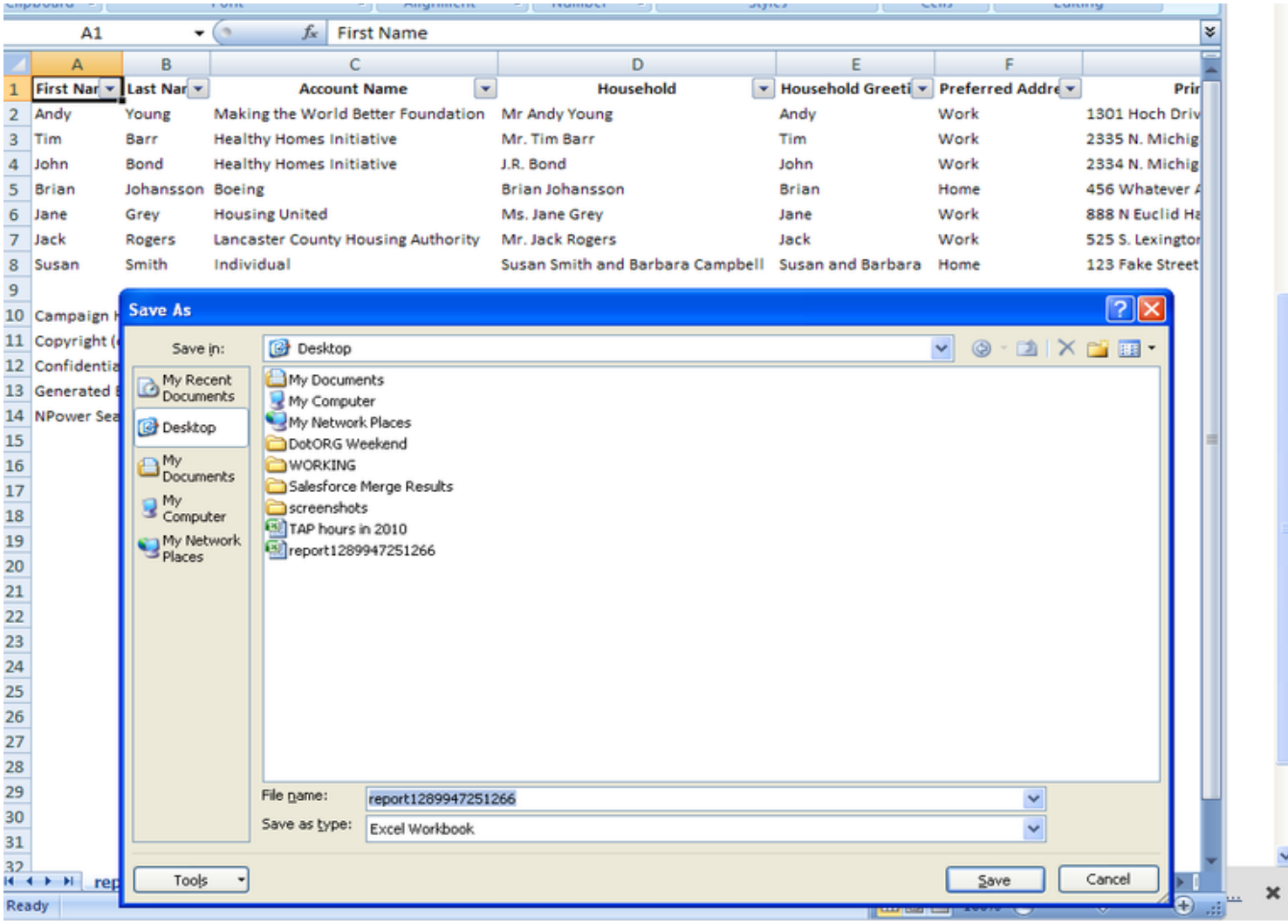
1. Open the campaign, and then click the **Household Mailing List** custom link.

2. Click **Run Report**. This runs custom code that filters out duplicate household members so you can avoid sending more than one copy to household members, then displays a report that shows all the household name and address fields you need to perform a mail merge.

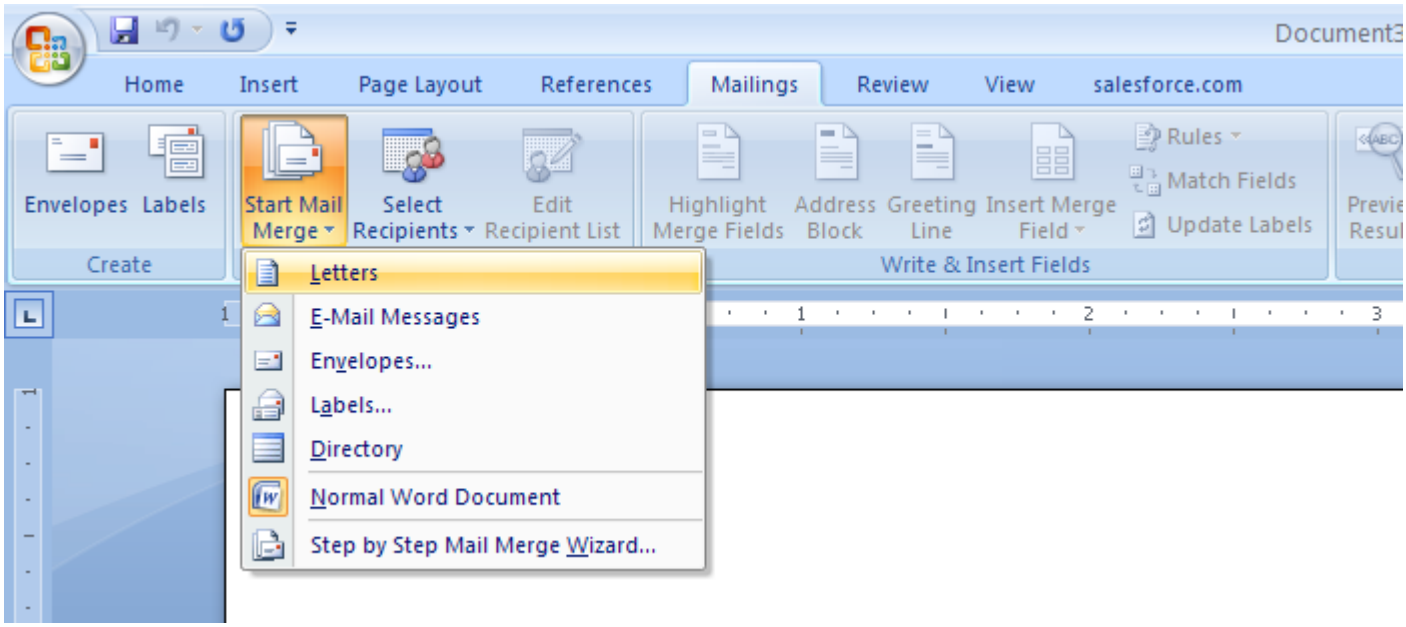


3. Click **Export Details** to save a Microsoft Excel file. The version of Excel file that is exported is outdated, so you'll want to open the downloaded export file, open it in Excel, and save it as an Excel Workbook.

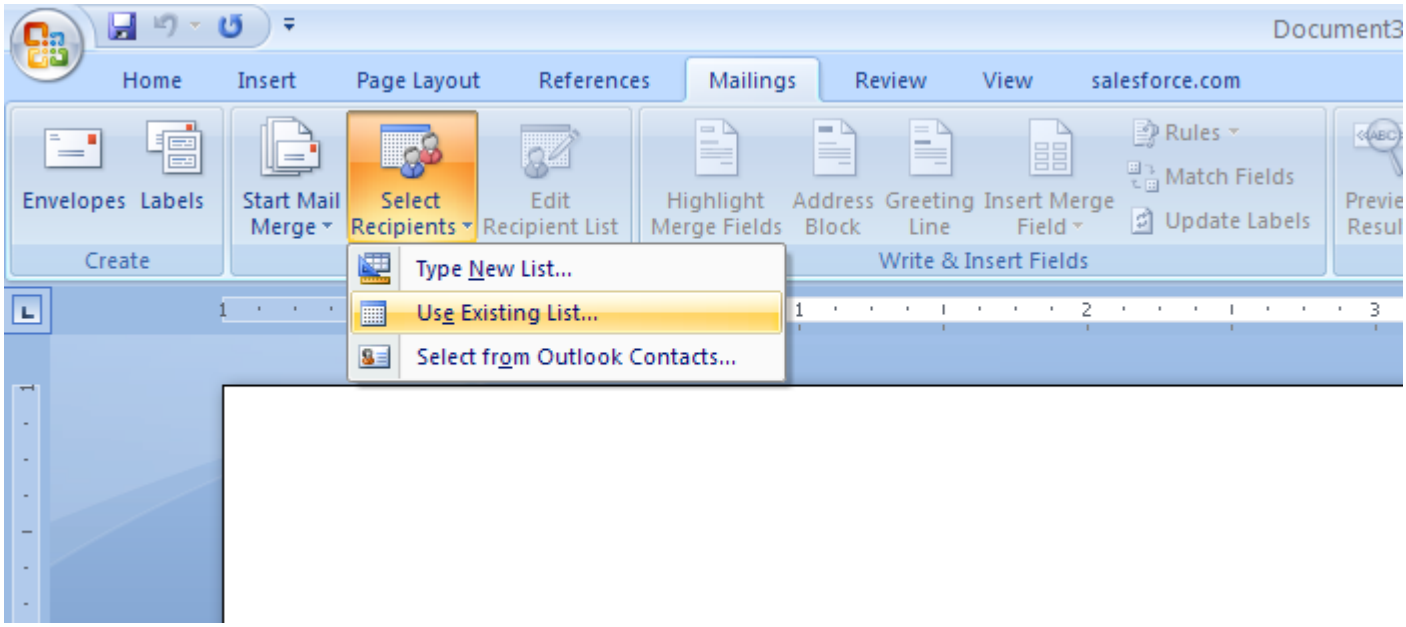
4.



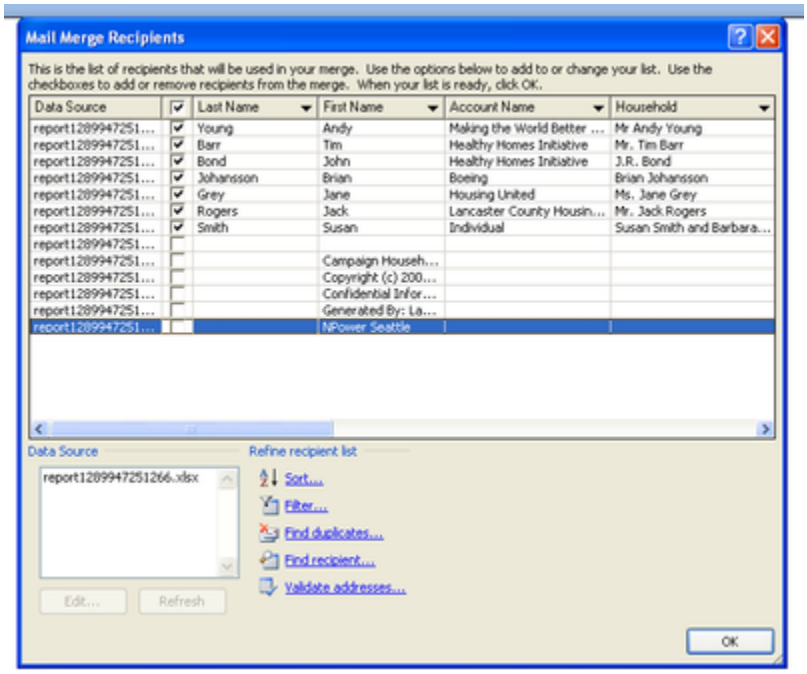
5. In Word, click on the Mailings tab, then click Start Mail Merge > Letters.



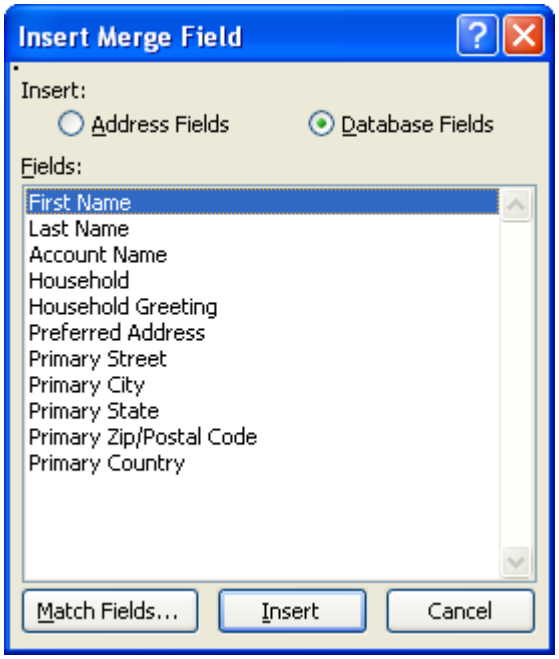
6. Click Select Recipients > Use Existing List, and select the Excel file you just saved.



7. Click Edit Recipient List to remove the bottom rows from the spreadsheet. (These contain information about the report, not contact names.)



8. Click Insert Merge Fields to include information from the spreadsheet in your letter. Keep in mind that if you want to address all Household members, you should select Household ("Bob and Mary Smith") and Household Greeting ("Bob and Mary") instead of First Name and Last Name.



9. Write your letter text and arrange the merge fields as needed.

November 16, 2010

«Household»
«Primary_Street»
«Primary_City», «Primary_State» «Primary_ZipPostal_Code»

Dear «Household_Greeting»:

We're thrilled to invite you to Demo Dining Event on December 23, 2010. We hope you'll join us!

Sincerely,

Joe Blow
Executive Director, Awesome Foundation

10. Click Preview Results to check your work. When everything looks good, click Finish & Merge to complete the merge.

November 16, 2010

Mr. Tim Barr
2335 N. Michigan Avenue, Suite 1500
Chicago, IL 60601

Dear Tim:

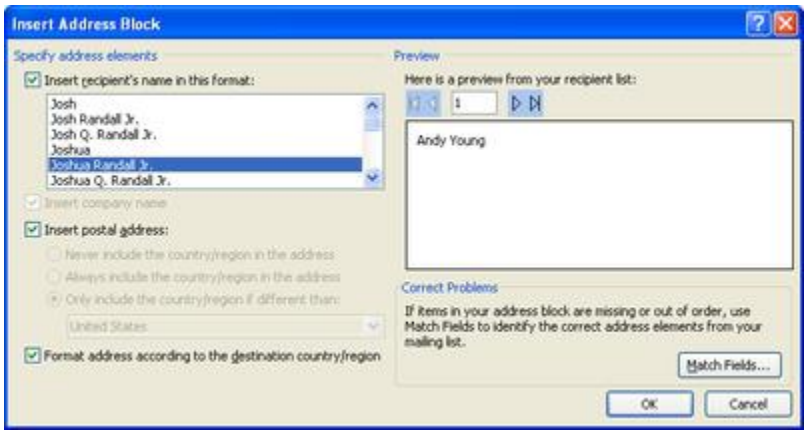
We're thrilled to invite you to Demo Dining Event on December 23, 2010. We hope you'll join us!

Sincerely,

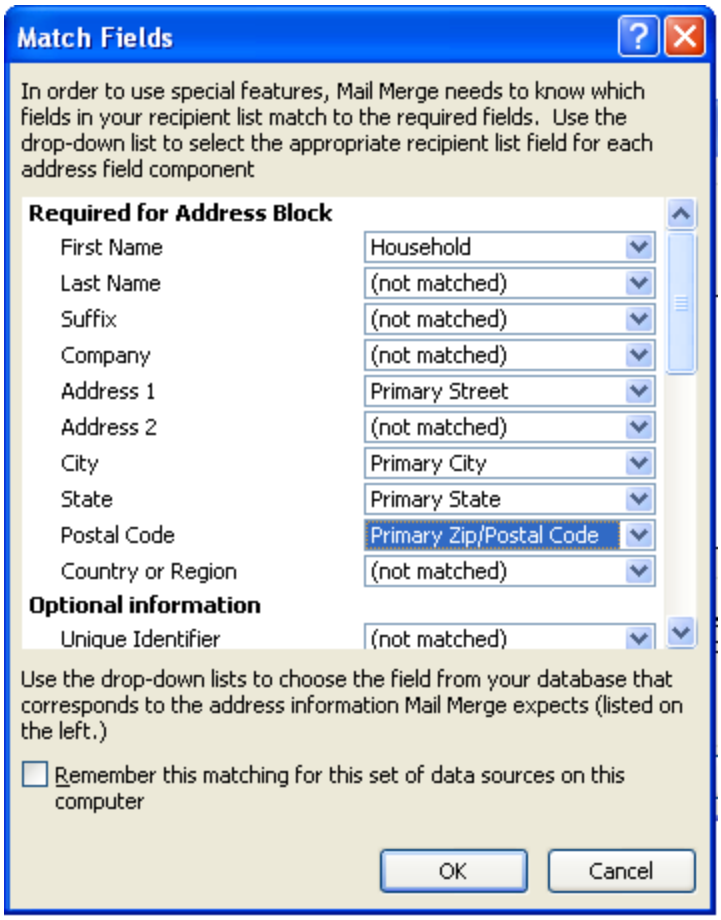
Joe Blow
Executive Director, Awesome Foundation

CREATE LABELS FOR YOUR MAILING

1. In a new document, click Start Mail Merge > Labels, and select the label size that you want to print.
2. Click Select Recipients and select the Excel file that you used for your letter.
3. Click Address Block.



4. Click Match Fields, then use the drop-down boxes to select the fields you want to use. For a household mailing, match First Name with Household and make sure Last Name is not matched.



5. Click Update Labels. <<ADDRESS BLOCK>> should now be included on all labels.
6. Click Preview Results to check your work. When everything looks good, click Finish & Merge.

Mr Andy Young
1301 Hoch Drive
Lawrence, KS 66045

Mr. Tim Barr
2335 N. Michigan Avenue, Suite 1500
Chicago, IL 60601

J.R. Bond
2334 N. Michigan Avenue, Suite 1500
Chicago, IL 60601

Brian Johansson
456 Whatever Ave.
Tacoma, WA 55555

Ms. Jane Grey
888 N Euclid Hallis Center, Room 501
Tucson, AZ 85721

Mr. Jack Rogers
525 S. Lexington Ave
Burlington, NC 27215

Susan Smith and Barbara Campbell
123 Fake Street
Seattle, WA 90210

Emailing Campaign Members

You may want to send email as part of a campaign. Salesforce limits outgoing email to 250 at one time and 1000 each day. If your campaign has fewer than 250 members, you can send them email easily. (With Vertical Response, which we have pre-installed in your Salesforce account, you can send email to unlimited campaign members; look for information on the VR Email tab.)

To send email from Salesforce to several contacts at once, you use an email template; you may need to create a new template for each campaign.

To email campaign members:

1. Create an email template. (See "Email Communication Templates" later in this document.)
2. Click the **Contacts** tab, and then click **Mass Email Contacts**.
3. Click **Create New View.**
4. Type a name for the view, select the Campaign you want, and then click **Save**. Salesforce displays the contacts included in the view.
5. Follow steps to select contacts, select an existing email template, and then send the email.

When you receive responses to your campaign, you can update the status of members by clicking **Manage Members** and then clicking **Update Status – Existing Contacts**. In addition, whenever a campaign results in a donation, be sure to set the Campaign field in the Opportunity record. Then, the Campaign Revenue Report will show you the effectiveness of your campaigns.

For more information on Campaigns, search Help for "Campaigns" or "Marketing."

Email Communications Templates

Salesforce can send email to one contact (in the **Activity History** list on the contact record, click **Send Email**) or to up to 250 contacts at once (on the **Contacts** tab, click **Mass Email Contacts**), up to a daily maximum of 1000 emails. In addition, the Salesforce system can send email alerts to users of the system based on workflow rules you define.
To make emailing contacts easier and encourage consistent email text or formatting, use email templates. Your NPower consultant has created a general email letterhead and template for you; you can use that template or create your own. If you want your email to include images or look professional and branded, you may want to upload graphics and then use them to create HTML email templates.

To upload a graphic or logo:

1. Click the **Documents** tab, then click **New**.
2. Enter a Document Name.
3. Select the **Externally Available Image** box.
4. Click **Browse** and find the file on your computer.
5. Click **Save**.

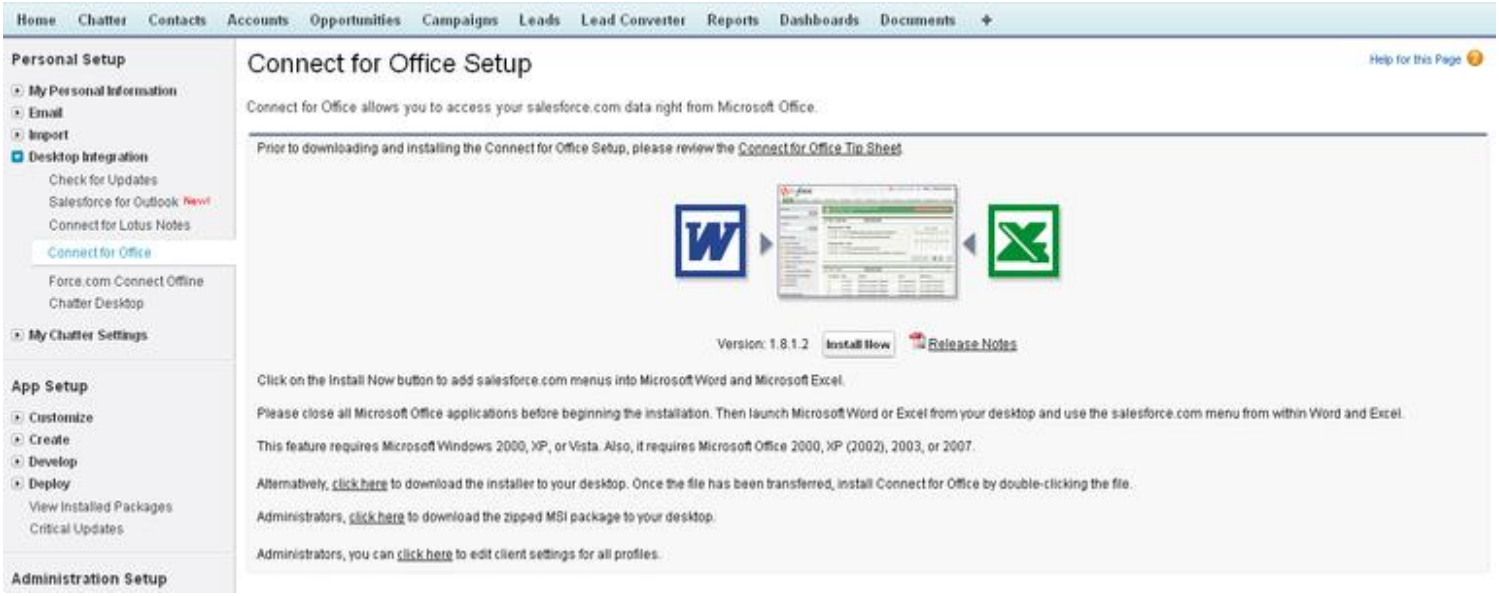
To create an email template:

1. Click **Setup** > **Communication Templates** > **Email Templates**.
2. Click **New Template** and follow the instructions.

You may also want to change the email templates that are used to respond to web leads or used to notify users about tasks. For more information, search help for “Email” and “Workflow Alerts.”

Printing Communications Templates

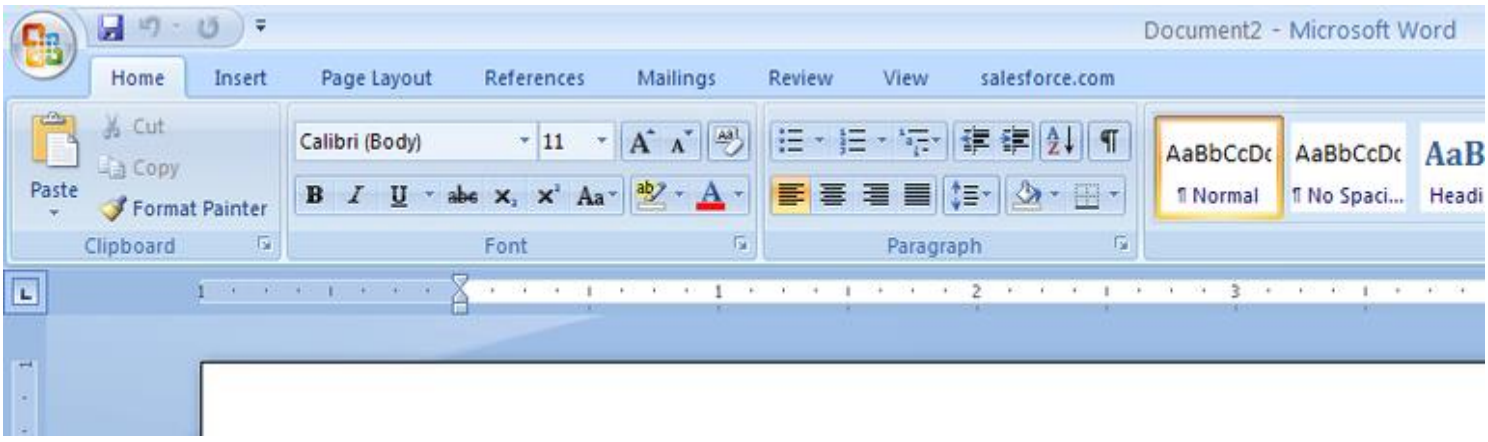
Installing Connect for Office



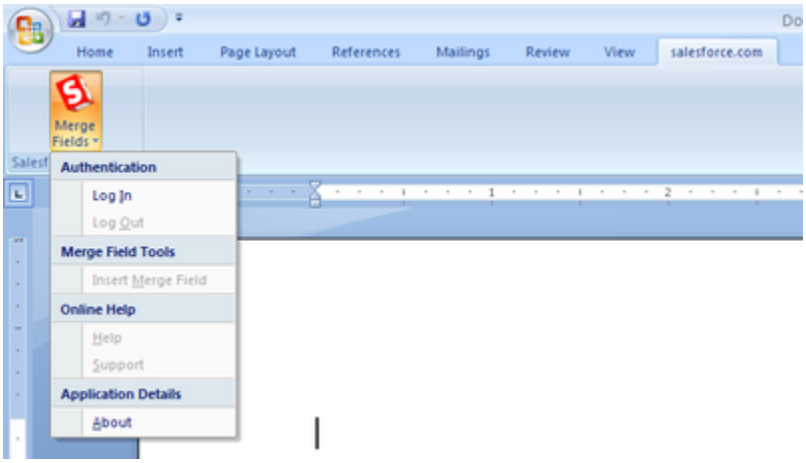
1. In Salesforce, go to Setup > Desktop Integration > Connect for Office.
2. Click Install Now.
3. Run the downloaded application setup file.

Creating a merge template in Word

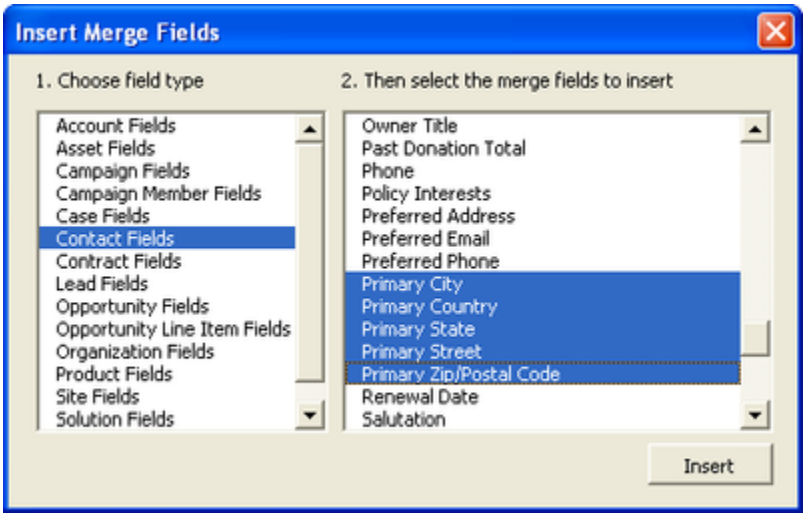
After you’ve installed Connect for Office, open Word. You should see a Salesforce.com tab on the right in the tab bar.



Click on the Salesforce.com tab, then click on the Merge Fields icon to login to your Salesforce account.



After you've logged into your account, click on the Merge Fields icon again and select Insert Merge Field. This is how you will insert fields from Salesforce into your document.



It is easiest to select all the fields you want in your document at once, then rearrange them once they're on the page.

November 15, 2010

«CONTACT_HOUSEHOLD»
«CONTACT_PRIMARY_STREET»
«CONTACT_PRIMARY_CITY», «CONTACT_PRIMARY_STATE» «CONTACT_PRIMARY_POSTAL_CODE»

Dear «CONTACT_HH_GREETING»:

Thank you for your donation. We really appreciate it. Some more sample text.

Sincerely,

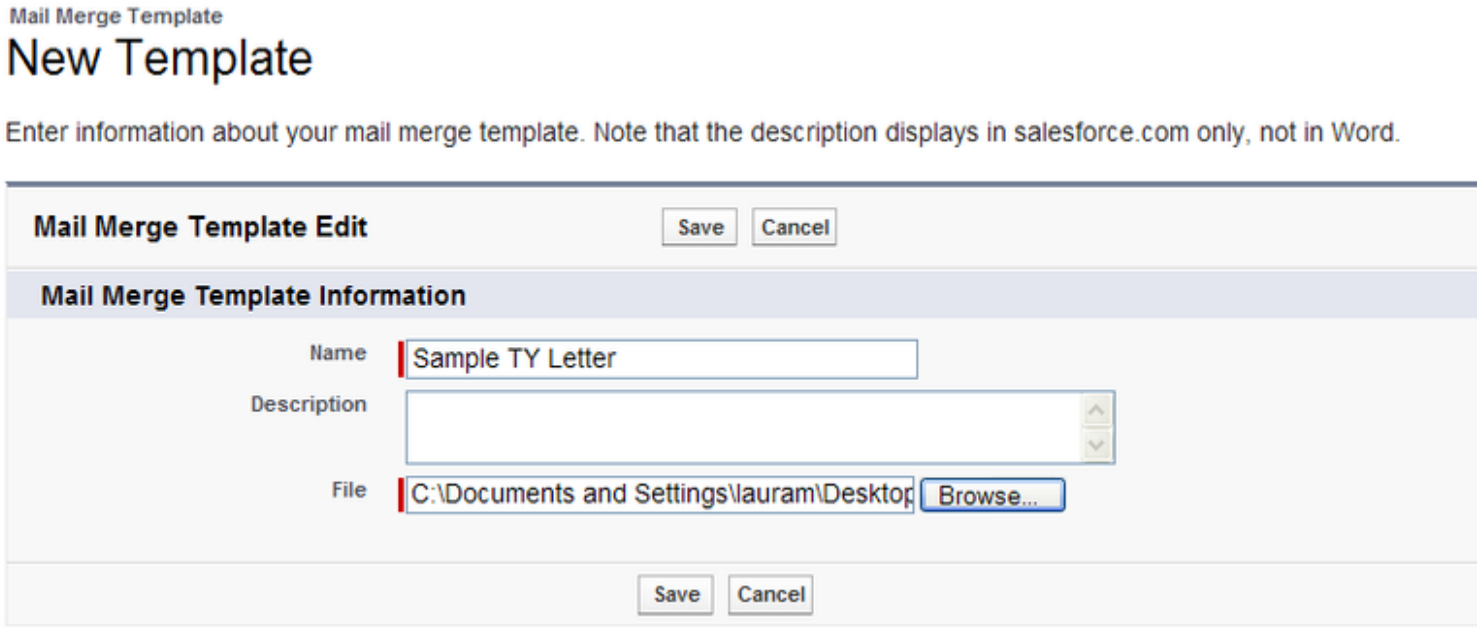
«USER_FIRSTNAME» «USER_LASTNAME»
«USER_TITLE», «ORG_NAME»

Donation Information
Date: «OPPORTUNITY_CLOSEDATE»
Tax-Deductible Amount: «OPPORTUNITY_NET_VALUE_OF_DONATION»

When you've finished editing your document, save it as a .doc file (Word 97-2003 document). This is not the standard format for Word 2007, but it is what is needed to work with Salesforce.

Add A Merge Template to Salesforce

1. Go to Setup > Communication Templates (under Administration Setup) > Mail Merge Templates
2. Click Add a New Template
3. Give your template a name and select the .doc file you saved from Word

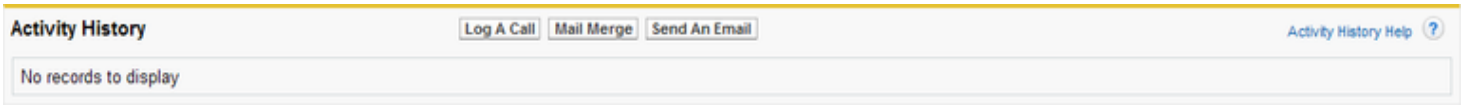


The template is now available to use when generating letters from Salesforce records, including Contacts and Opportunities.

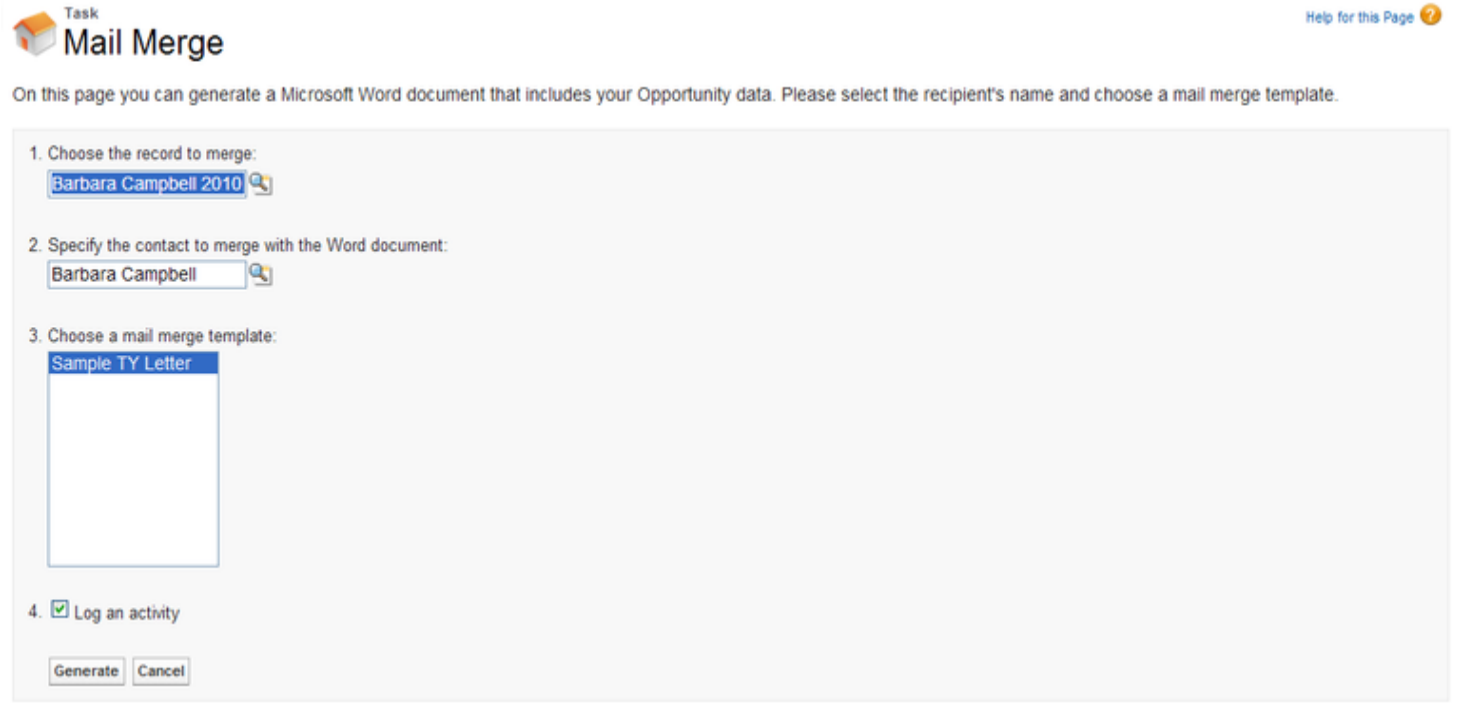
Use A Mail Merge Template To Create A Thank You Letter

Note: Mail Merge only works in Internet Explorer.

1. Go to the Opportunity for which the Thank You is needed.
2. Under Activity History, click Mail Merge.



3. Select the mail merge template you want to use.



4. Click Generate and wait for the merged document to load in Word.
5. Edit your letter as needed and send it to the donor.

November 15, 2010

Susan Smith and Barbara Campbell

_____

_____, _____

Dear Susan and Barbara:

Thank you for your donation. We really appreciate it. Some more sample text.

Sincerely,

Laura Meerkatz
Database Consultant, NPower Seattle

Donation Information
Date: 11/9/2010
Tax-Deductible Amount: $250.00

Any fields that weren't filled out in Salesforce will appear as blank underlines. In this case, no address was entered for Susan Smith and Barbara Campbell.

6. Back on the Opportunity record in Salesforce, change the stage from Won – Need Thank You to Closed Won.

Administering Your Salesforce Database

User Administration and Permissions

Your Salesforce license donation allows up to 10 active user accounts. Every person who uses Salesforce should have his or her own account. User accounts have a user alias, user login name (usually the person's email address), and a *profile* and *role* that determine permissions and the objects that are visible to each user throughout Salesforce.
If you want to separate what is shown to users in different areas of your organization, you can use roles. For example, if you track both programs and fund development, you can assign users to separate roles for Executive, Programs, and Development and configure sharing rules such that users with the Programs role can't view or change opportunity records owned by Development users.

To specify overall permissions for certain users—who can edit other users' data, for example—use profiles. Not all organizations need to use roles, but Salesforce requires every user to have a security profile setting.

Most organizations use only the following user profiles:

Profile	Used For
System Administrator	Primary administrator and/or database consultant; can view all tabs, change all data, and add or edit user accounts
Nonprofit User	Ordinary user with permission to add, edit, delete, and transfer public or shared records and records that he/she owns
Nonprofit Manager	Special user with permission to add, edit, delete, and transfer all records
Read Only	User who can view public data but not edit anything

You can edit permissions for each of these profiles, or create a custom profile, by clicking **Setup** > **Manage Users** > **Profiles.** For more information, search Help for "Roles" and "Profiles."

Creating or Changing Users

If you are a System Administrator, you can change user options, add or delete users, or reset a password.

To create, change, or deactivate users:

1. Click **Setup** > **Manage Users** > **Users**.
2. Click **Edit** next to the user you want to change (or click **New** to create a new user).
3. Set options, select the Marketing User check box, and then click **Save**.

To reset the user's password and automatically send an email with a new password:

1. Click **Setup** > **Manage Users** > **Users**.
2. Click **Edit** next to the user who needs a new password.
3. Click **Reset Password**.

Updating Picklist Values

Picklists allow you to create a drop-down list of values for a certain field. You can update the list of possible picklist values in Setup.

You will first need to find the object with the field you want to update. This might be a standard object like Accounts or Opportunities, or it might be a custom object like Household. You're most likely going to be working with a standard object, so

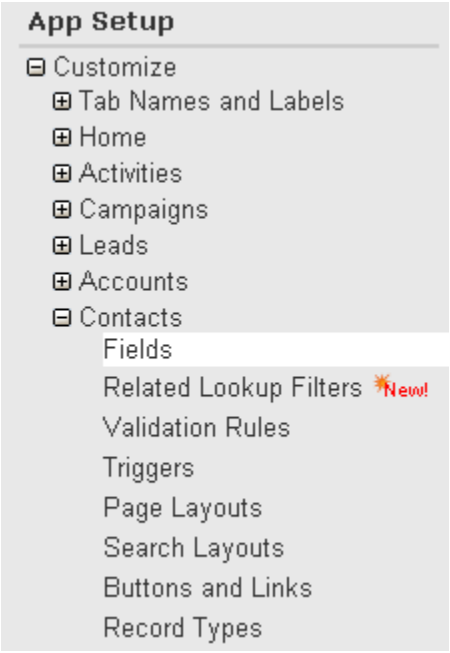
we'll start with instructions for those. If you can't find the object you're looking for, try following the steps under "Updating Picklist Values in a Custom Object Field."

Note: You should always check with your consultant before changing existing picklist values. Some picklist values are used in Apex code, and changing those values could cause the code to break.

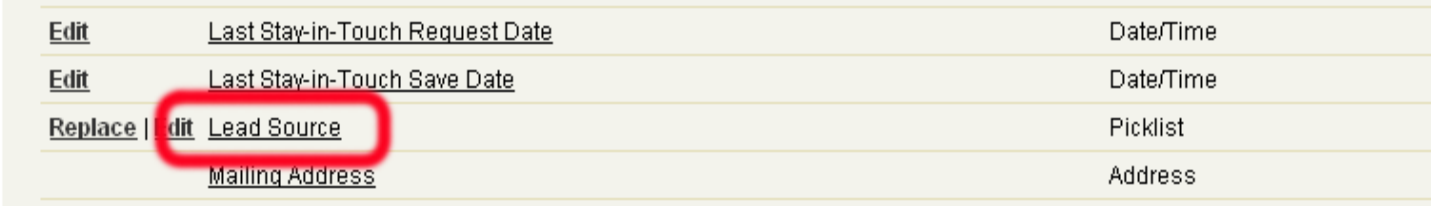
Updating Picklist Values in a Standard Object Field

For example, let's update the Lead Source field in Contacts to add an "Outreach Event" option.

1. Click **Setup** > **Customize > Contacts (or other object) > Fields**.



2. **Find the field** whose values you'd like to update. Keep in mind that if the field is a custom field, you will have to scroll past all the standard fields to find it.
3. **Click on the Field Label,** in this case Lead Source.



4. Under Lead Source Picklist Values, **click New.**

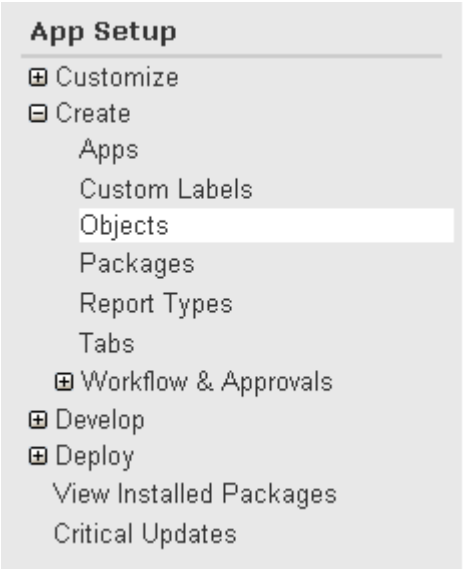
5. **Type in the new value(s)** you'd like to add.

6. **Click Save.**

Updating Picklist Values in a Custom Object Field

The process for changing picklist values in a custom object is the same as it is for standard objects, but you find the custom object itself in a different place.

1. Click **Create** > **Objects**



2. Click on the **Label** with the field you're looking for.
3. Click on the **Field Label** of the field you're updating.
4. Follow steps 3-6 above.

Screencasts

Screencasts are located throughout the documentation and are also listed here for easy access/

Add Contact
Add Grant Opportunity
Add Account
Add Opportunity
Add Payment
Edit Household