



# **HSC Salesforce.com**

## **User Manual**

**Office Manager /Communications, Membership  
and Development**

Modified By	Date	Description
Paola la Zazzera	22 March, 2011	<p>Added paragraph <b>Donation</b></p> <p>Added <b>Report</b> description under <b>Members Reports</b></p> <ul style="list-style-type: none"> <li>- Brooklyn Service Site</li> <li>- Brooklyn Service Site – List</li> <li>- Brooklyn Service Site (Org In BR) Board</li> <li>- Brooklyn based Organization</li> </ul>



The Voice of the Human Services Community

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## **Introduction**

This is a guide to using Salesforce for the roles of Office Manager/ Administrative Assistant or Membership & Development. Two distinct profiles have been established: one for the overall office management and another for membership/development activities.

## **Login**

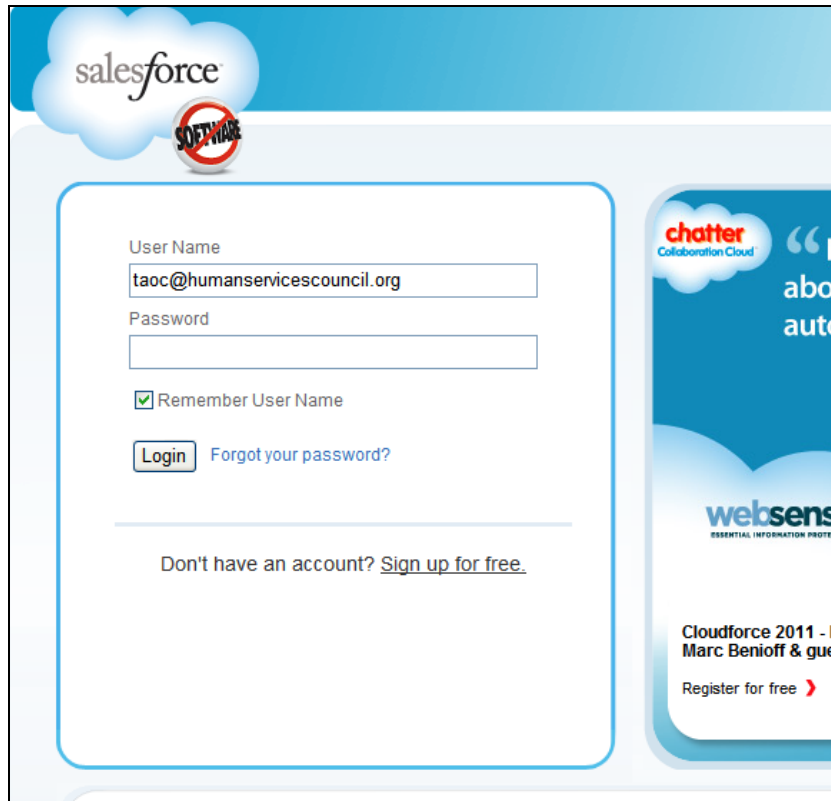
### **Office Manager Profile**

**Username:**

**Password:**

Note: The following two sections are part of Salesforce.com's workflow capability. You can use Salesforce to assign, track, and follow up on to-dos (whether your own or another staff member's to-do), as well as to manage your calendar, but it is unlikely that HSC will use this function at the beginning. The following text is mostly informational, in case HSC decides in the future to roll out Salesforce to the entire team.

Go to the page <https://login.salesforce.com/> to login.



The image shows the Salesforce login page. At the top left is the Salesforce logo. Below it is a "SOFTWARE" logo with a red "X" over it. The main login area is a white box with a blue border. It contains fields for "User Name" (with the email "taoc@humanservicescouncil.org" entered) and "Password". Below these fields is a checkbox labeled "Remember User Name" which is checked. There is a "Login" button and a link "Forgot your password?". Below the login box is a link "Don't have an account? Sign up for free.". To the right of the login box is a sidebar with a "chatter" logo, a quote "about auto", a "websens" logo, and a "Cloudforce 2011 - Marc Benioff & gue" section with a "Register for free" link.

salesforce

SOFTWARE

User Name  
taoc@humanservicescouncil.org

Password

☒ Remember User Name

Login [Forgot your password?](#)

Don't have an account? [Sign up for free.](#)

chatter  
Collaboration Cloud

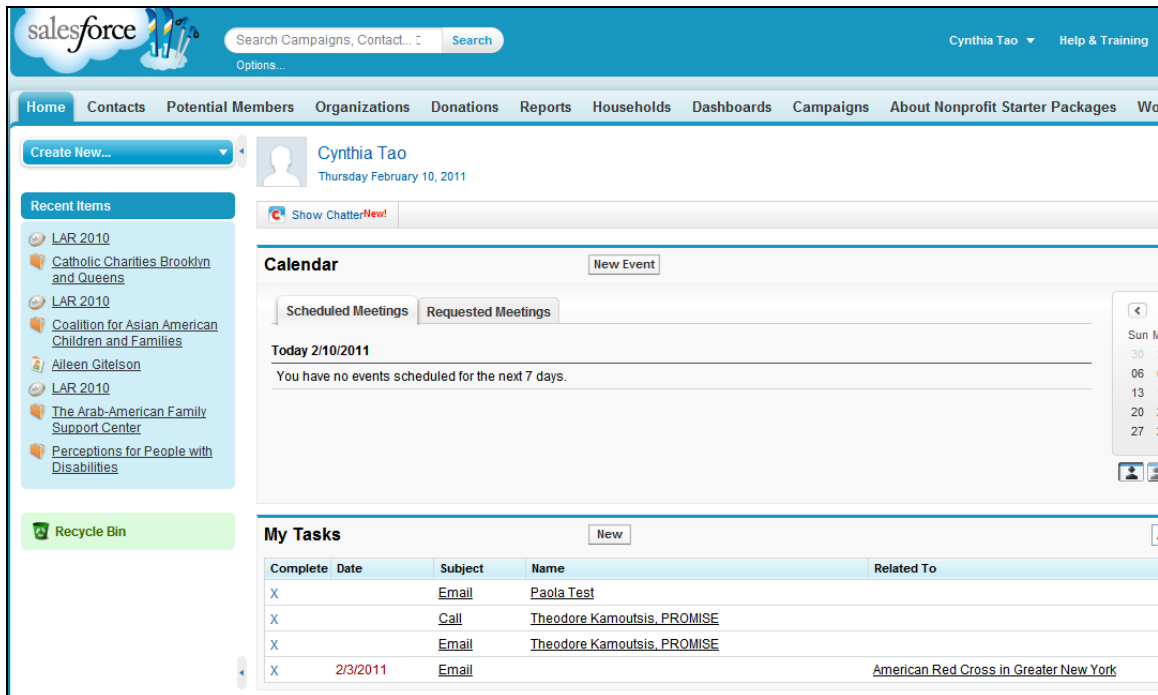
“ about auto

websens  
ESSENTIAL INFORMATION PROTECTOR

Cloudforce 2011 - Marc Benioff & gue

Register for free

From the Home tab, you can view two sections: **Calendar** and **My Tasks**



The image shows the Salesforce Home dashboard for Cynthia Tao. The top navigation bar includes the Salesforce logo, a search bar, and the user's name "Cynthia Tao" with a "Help & Training" link. Below the navigation bar is a "Create New..." button and a "Recent Items" list. The main content area is divided into two sections: "Calendar" and "My Tasks". The "Calendar" section shows a "New Event" button and a "Scheduled Meetings" tab. The "My Tasks" section shows a "New" button and a table of tasks.

salesforce

Search Campaigns, Contact... Search

Cynthia Tao Help & Training

Options...

Home Contacts Potential Members Organizations Donations Reports Households Dashboards Campaigns About Nonprofit Starter Packages Wo

Create New...

Recent Items

- LAR 2010
- Catholic Charities Brooklyn and Queens
- LAR 2010
- Coalition for Asian American Children and Families
- Aileen Gitelson
- LAR 2010
- The Arab-American Family Support Center
- Perceptions for People with Disabilities

Recycle Bin

Cynthia Tao  
Thursday February 10, 2011

Show ChatterNew!

Calendar [New Event](#)

Scheduled Meetings Requested Meetings

Today 2/10/2011

You have no events scheduled for the next 7 days.

My Tasks [New](#)

Complete	Date	Subject	Name	Related To
X		Email	Paola Test	
X		Call	Theodore Kamoutsis, PROMISE	
X		Email	Theodore Kamoutsis, PROMISE	
X	2/3/2011	Email		American Red Cross in Greater New York

## Using the My Tasks Section

In the My Tasks section, you can view a list of tasks assigned to you. You can also assign tasks to yourself or others using this section.

A task is a Salesforce.com object used to track to-do activities such as Call, E-mail and Send Letter.

Click **New** to create a new task.

Enter the details of the task:

- **Assigned To**—Assigned owner of the task. By default, the task is assigned to the creator. To assign the task to another user, enter a user's name, or select a user with the lookup icon. To assign independent copies of a new task to multiple users, see [Creating Group Tasks](#).
- **Subject**—The subject or short description of the task, for example, "E-mail quote to customer." You can enter a subject, or select from a picklist of previously defined subjects.
- **Due Date (optional)**—Date when the task should be completed. You can enter a date, or choose a date from the calendar that displays when you put your cursor in the field.
- **Comments (optional)**—Text note describing the task. This field can hold up to 32KB of data.
- **Related To (optional)**—The record that the task is associated with such as an account or opportunity. This field is not available when you associate the task with a lead instead of a contact.
- **Name (optional)**—Contact or lead associated with the task. You can enter the name of the person or use the lookup icon to select the name.

Enter the details of the event such as subject, start date and time, and end date and time.



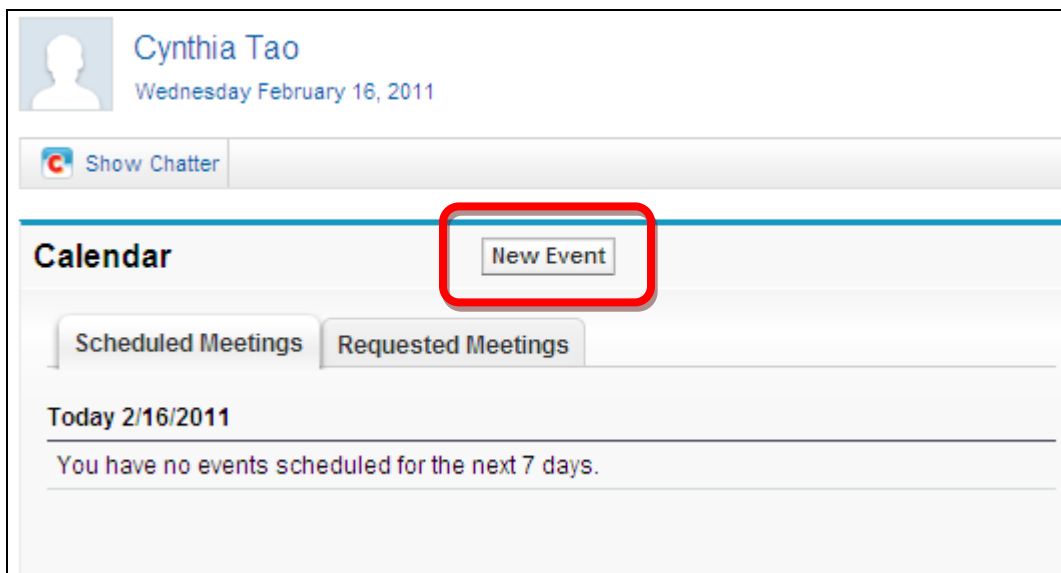
Using the **Recurrence** section you can create daily, weekly, monthly or yearly recurrent events.

Click **X** to close a task.

## Using the Calendar Section

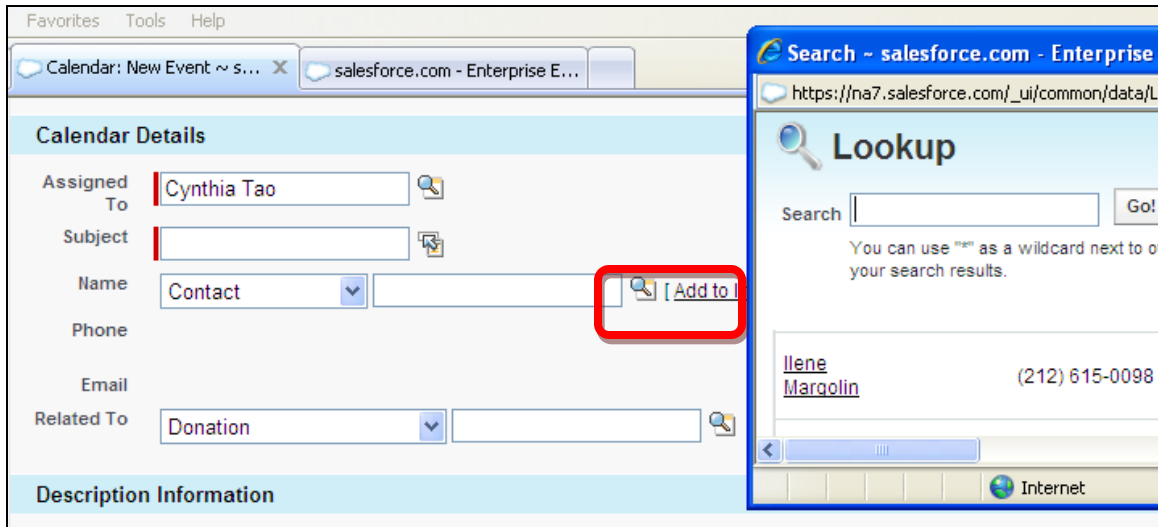
An **Event** is a Salesforce.com object used to schedule a series of activities such as Meeting, Call or E-mail. When creating an Event, you can add multiple Invitees.

In the Calendar section on the **Home** tab, click **New Event** to create a new event.



Enter the details of the event such as subject, start date and time, and end date and time.

To add Invitees click the  symbol next to the **Add to Invitees** link.



You can also click the **Add Invitees** button.

**Invite Others:**

**Add Invitees**

Wednesday, February 16, 2011

Action	Invite	Type	6AM	7AM	8AM	9AM	10AM	11AM	12PM	1PM	2PM	3PM
	Cynthia Tao	User										

Note: the Search function will only display up to 50 rows at a time.

## Office Manager Profile

**Username:**

**Password:**

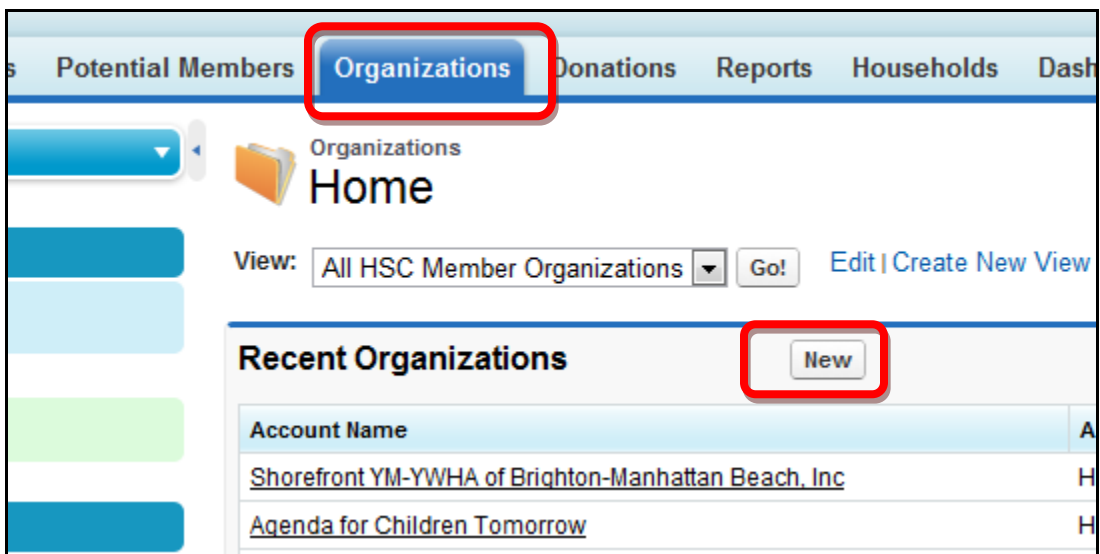
### *How to Create or Update an Organization*

An **Organization** represents a non-profit agency or any other company/foundation related to HSC such as:

- HSC Member
- Foundation
- Government Agency
- Media Contact
- Vendor

### Create New Organization

To create a new Organization, click on the **Organizations** tab, and click **New**.



Select the appropriate **Record Type** from the drop-down list **Record Type of new record**. Each Record Type will display a different set of detail fields, depending on which record type you select.

The screenshot shows a web form titled "Select Account Record Type". It features a label "Record Type of new record" next to a dropdown menu. The dropdown menu is open, showing a list of options: "HSC Member", "Foundation", "Government Agency", "HSC Member" (highlighted), "Media", "Other", and "Vendor". A red rectangle highlights the dropdown menu. Below the dropdown, there is a table titled "Available Organization Record Type".

Record Type Name	Description
Foundation	
Government Agency	
HSC Member	HSC member organization
Media	
Other	
Vendor	

To the right of the dropdown menu, there is a "Cancel" button.

Click **Continue**.

The screenshot shows the same "Select Account Record Type" form. The dropdown menu now displays "HSC Member". A red rectangle highlights the "Continue" button, which is located to the right of the dropdown menu. A "Cancel" button is also visible to the right of the "Continue" button.

Fill in the Organization's details in the appropriate fields. Some fields are marked with a question mark (?) next to the field name; you can click on this button to get help about that field.

Account Edit  
**New Organization**

**Organization Edit** Save Save & New Cancel

Account Record Type: HSC Member

Account Name:

Acronym:

Type: --None--

Parent Account:

Current Funder: ☐

Permanent Board Member: ☐

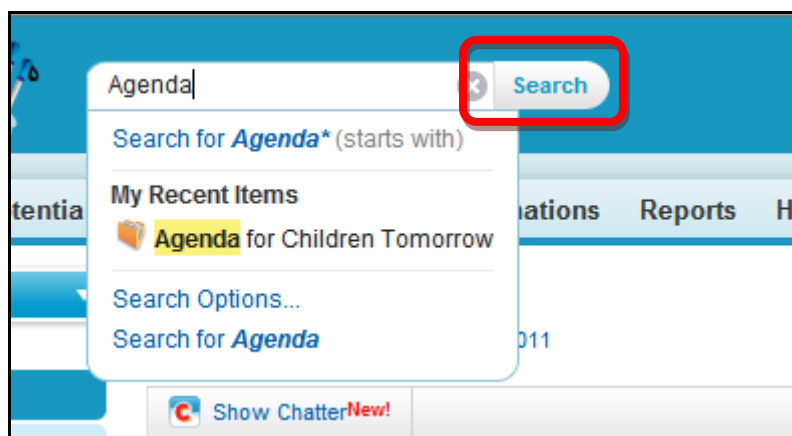
HSC ID:

HSC Password:

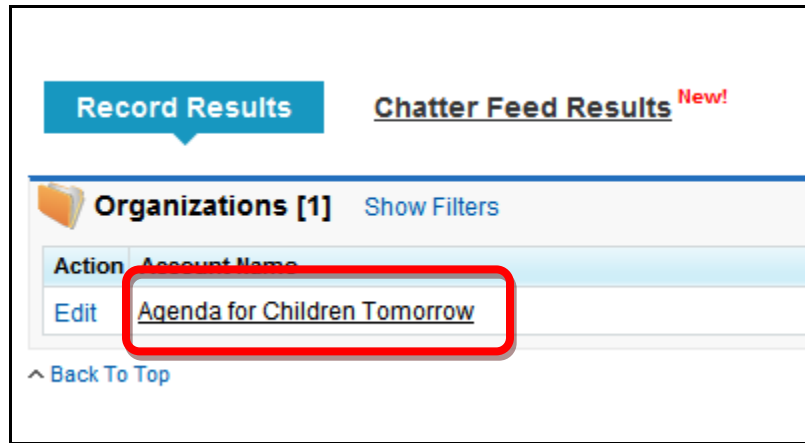
Click Save.

## Update an existing HSC Member Organization

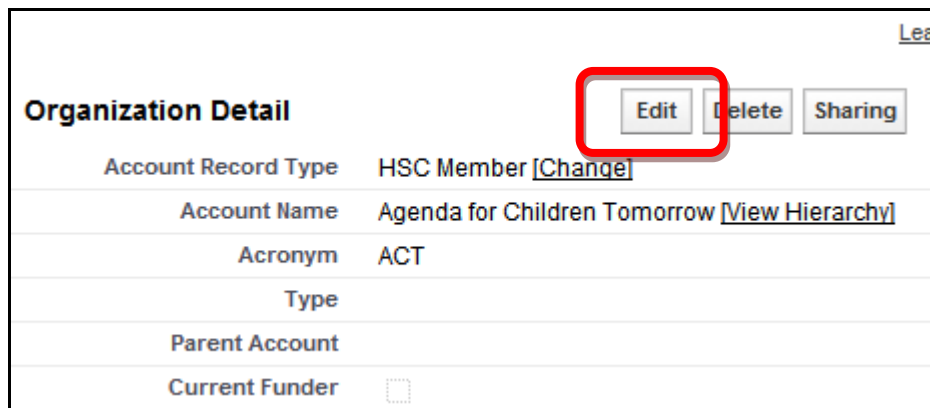
To update an existing **Organization**, use the **Search** box. Type in the Organization name and click **Search**. You can also just type in the first few letters or the organization's acronym and search results will appear that match what you typed.



Click on the Organization name from the search results.



Click the **Edit** button.



Update the fields as necessary, then click on **Save**.

**Organization Edit**

Save

Account Record Type	HSC Member
Account Name	Agenda for Children Tomo
Acronym	ACT
Type	--None--
Parent Account	<input type="text"/>
Current Funder	<input type="checkbox"/>

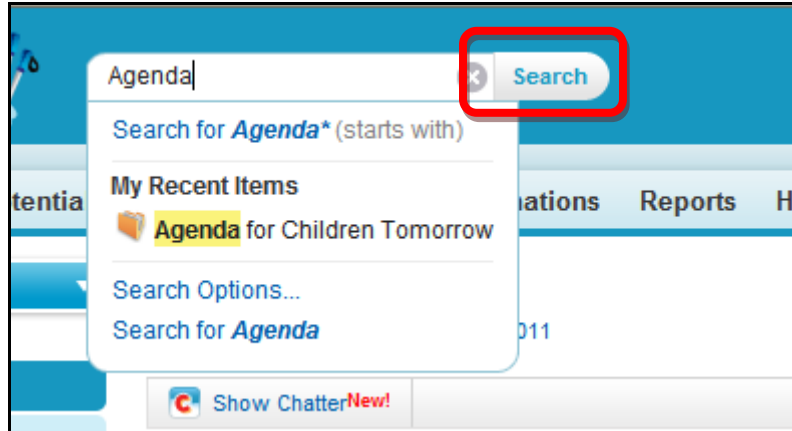
## *How to Create or Update an HSC Member Contact*

Organizations are separate from individual contacts in the Salesforce database. You can associate one or more individuals with an organization but are gathering different sets of information for individuals as opposed to organizations.

If you want to associate a contact with an organization, for example, if there is a new Executive Director that you want to add to the database, you would want to create the new contact from the **Organizations Tab** (<https://na11.salesforce.com/001/o>). If you want to add a new contact that may not be associated with an organization, for example, people who contribute to the annual Leadership Awards Reception, you would create the new contact from the **Contacts Tab** (<https://na11.salesforce.com/003/o>).

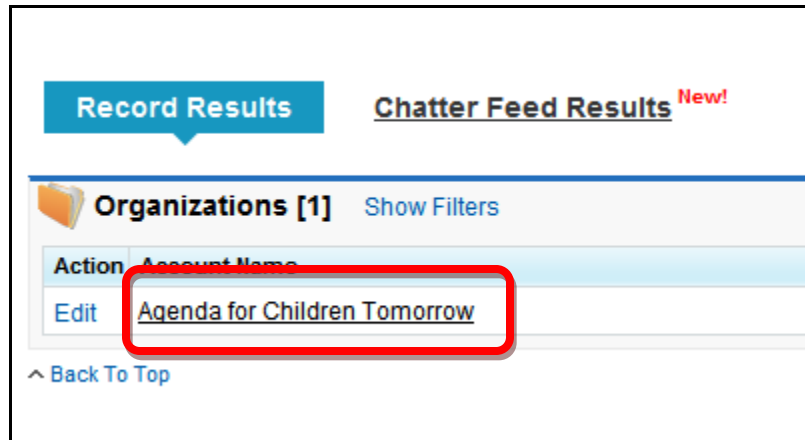
### **Creating a New Contact from the Organizations Tab**

Search by name the **Organization** to which you want to add a **Contact**.

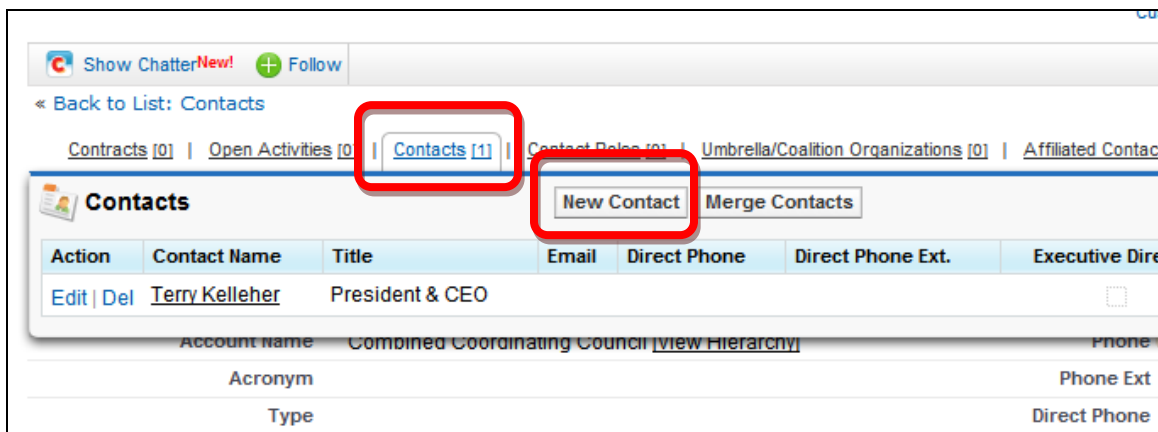


Click on the Organization name from the search results.





Click on the **Contacts** link, and then click **New Contact**.



Select a **Record Type** for the New Contact. Each selected Record Type will display a different set of fields to fill in.

Click on **Continue**.

**Select Contact Record Type**

Record Type of new record

HSC Member  
 Default Contact  
 Government Rep  
 HSC Member  
 Media Contact  
 Vendor

Continue Cancel

Available Contact Record Types

Record Type Name	Description
Default Contact	Default Contact
Government Rep	Custom
HSC Member	Current/Former Member
Media Contact	Custom
Vendor	

Fill in the fields and click **Save**.

**Contact Edit**

## New Contact

Contacts not associated with organizations are private and cannot be viewed by other users or included in reports.

**Contact Edit**

Save

Save & New Cancel

**Contact Details**

Contact Record Type: HSC Member

First Name: --None--

Last Name:

Suffix:

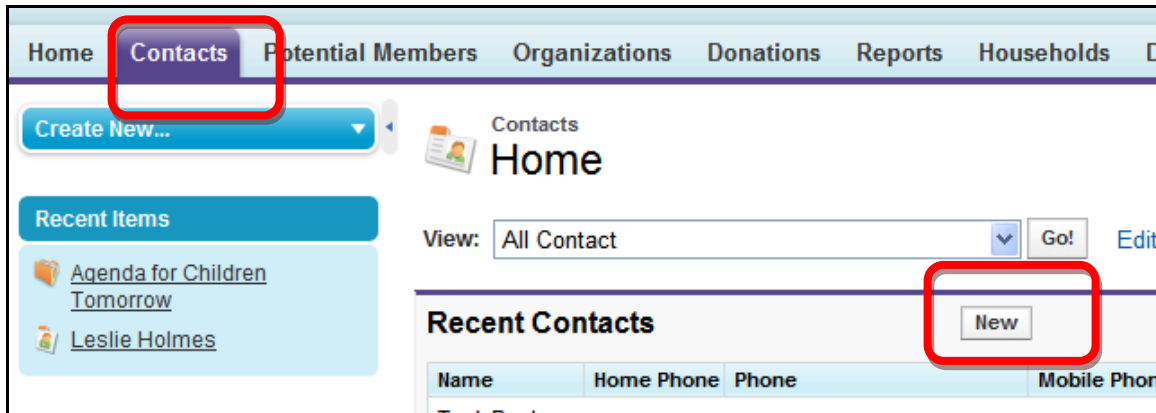
Title:

Account Name:

Status: --None--

## Creating a New Contact from the Contacts Tab

To create a new **Contact**, click the **Contacts** tab, and then click on **New**.



Select a **Record Type** for the New Contact. Each Record Type displays a different set of fields. Click on **Continue**.

The screenshot shows the 'Select Contact Record Type' dialog. The 'Record Type of new record' dropdown menu is open, showing options: HSC Member, Default Contact, Government Rep, HSC Member (highlighted), Media Contact, and Vendor. The 'Continue' and 'Cancel' buttons are visible. Below the dialog, a table titled 'Available Contact Record Types' is shown.

Record Type Name	Description
Default Contact	Default Contact
Government Rep	Custom
HSC Member	Current/Formal Member
Media Contact	Custom
Vendor	

Fill in the fields and click **Save**.

**Contact Edit**  
**New Contact**

Contacts not associated with organizations are private and cannot be viewed by other users or included in reports.

**Contact Edit** **Save** **Save & New** **Cancel**

**Contact Details**

Contact Record Type: HSC Member

First Name: --None-- [dropdown] [text box]

Last Name: [text box]

Suffix: [text box]

Title: [text box]

Account Name: [text box] [icon]

Status: --None-- [dropdown]

## Updating an Existing Contact

To update an existing **Contact**, type in the **Contact Name** in the **Search** box and click **Search**. You can type in either first or last name, or a portion of a name.

Lund [icon] **Search**

Search for **Lund\*** (starts with)

**My Recent Items**

[icon] Jack **Lund**

Search Options...

Search for **Lund**

Click on the **Contact** Name from the search results.

Record Results

Chatter Feed Results New!

**Contacts [1]**

Action	Name	Account Name	Phone	Email	Primary Street	Primary City
<a href="#">Edit</a>	<a href="#">Mr. Jack Lund</a>	YMCA of Greater New York	(212) 630-9600	<a href="mailto:jlund@ymcanyc.org">jlund@ymcanyc.org</a>	5 West 63rd Street 6th Floor	New York

[^ Back To Top](#)

Click **Edit**.

[Donations \[1\]](#) | 
 [Activity History \[0\]](#) | 
 [Open Activities \[0\]](#) | 
 [Campaign History \[11\]](#) | 
 [...](#)

**Contact Detail**

[Edit](#)
[Delete](#)
[Clone](#)
[Sharing](#)
[Rec...](#)

▼ Contact Details

Contact Record Type	HSC Member <a href="#">[Change]</a>
Name	Mr. Jack Lund
Suffix	
Title	President/CEO
Account Name	<a href="#">YMCA of Greater New York</a>
Status	Current
Academic Titles	

Update the Contact's fields and press **Save**.

**Contact Edit**

Save Save & New Cancel

**Contact Details**

Contact Record Type HSC Member

First Name Mr. Jack

Last Name Lund

Suffix

Title President/CEO

Account Name YMCA of Greater New York

Status Current

Academic Titles

### Retrieve Existing Organization/Contact Details

Use the **Search** box at the top of all pages in Salesforce to find an Existing Organization/Contact. You can type the first or last name, acronym, or partial name of the Contact or Organization in the Search box and click **Search**.

Search Campaigns, Contact... Search

Options...

After you click **Search**, you will see the Search Results displayed below.

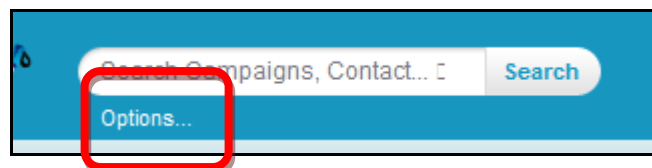
Record Results

Chatter Feed Results New!

 **Contacts [6]**

Action	Name	Account Name	Phone	Email	Primary Street	Primary City	Primary State/Province	Primary Zip/Post
<a href="#">Edit</a>	<a href="#">Jack Rosenthal</a>	<a href="#">Atlantic Philanthropies</a>						
<a href="#">Edit</a>	<a href="#">Hon. Jack Quinn</a>	<a href="#">NY State Assembly Members</a>			543 Legislative Office Building	Albany	NY	12248-0001
<a href="#">Edit</a>	<a href="#">Mr. Jack Rosenthal</a>	<a href="#">New York Times Foundation</a>			229 West 43rd Street	New York	NY	10036
<a href="#">Edit</a>	<a href="#">Jack Doyle</a>	<a href="#">New Settlement Apartments</a>	(718) 716-8000 x123	<a href="mailto:j.doyle@newsettlement.org">j.doyle@newsettlement.org</a>	1512 Townsend Avenue	Bronx	NY	10452
<a href="#">Edit</a>	<a href="#">Mr. Jack Krauskopf</a>	<a href="#">Baruch College</a>	(646) 660-6724	<a href="mailto:james_krauskopf@baruch.cuny.edu">james_krauskopf@baruch.cuny.edu</a>	135 East 22nd St, Room 915 One Bernard Baruch Way, Box D-901	NY	NY	10010
<a href="#">Edit</a>	<a href="#">Mr. Jack Lund</a>	<a href="#">YMCA of Greater New York</a>	(212) 630-9600	<a href="mailto:jlund@ymcanyc.org">jlund@ymcanyc.org</a>	5 West 63rd Street 6th Floor	New York	NY	10023

You can filter your search by clicking on **Options** under the Search box to search a subset of record types.



**Search Options**

Search...

**Records**

☐ All 11 of 27 Selected | [Clear All](#)

<input type="checkbox"/> Assets	<input checked="" type="checkbox"/> Donations	<input checked="" type="checkbox"/> Potential Members
<input type="checkbox"/> Attachments	<input type="checkbox"/> Events	<input type="checkbox"/> Products
<input checked="" type="checkbox"/> Campaigns	<input checked="" type="checkbox"/> Files	<input type="checkbox"/> Recurring Donatio...
<input type="checkbox"/> Case Comments	<input checked="" type="checkbox"/> Groups	<input checked="" type="checkbox"/> Reports
<input type="checkbox"/> Cases	<input type="checkbox"/> Households	<input type="checkbox"/> Service Site - Co...
<input checked="" type="checkbox"/> Contacts	<input type="checkbox"/> Ideas	<input type="checkbox"/> Service Sites
<input type="checkbox"/> Contracts	<input type="checkbox"/> Notes	<input type="checkbox"/> Solutions
<input checked="" type="checkbox"/> Districts	<input checked="" type="checkbox"/> Organizations	<input type="checkbox"/> Tasks

**More Options**

☐ Limit to items I own

☐ Exact phrase

We'll save your selected search options until you change them.

### ***How to Create/Update Contacts/Organizations that are not HSC Members***

If you need to **create** an Organization that is not an HSC Member (e.g., a Foundation or Vendor), after clicking the **New** button to create a new Organization, choose the correct **Record Type** among Media, Government Agency, Foundation, Vendor, or Other (if the Organization doesn't fit in any of the previous categories). Click **Edit**, update necessary fields, then press **Save**.

To update a Contact that is not an HSC Member (e.g. Media Contact), type the **Contact Name** in the **Search** box and click **Search**. You can type in either first or last name, or a portion of a name.

Jack

Options...



Click on the **Contact** Name from the search results.

Record Results

Chatter Feed Results New!

 **Contacts [6]**

Action	Name	Account Name	Phone	Email	Primary Street	Primary City	Primary State/Province	Primary Zip/Postal
<a href="#">Edit</a>	<a href="#">Jack Rosenthal</a>	<a href="#">Atlantic Philanthropies</a>						
<a href="#">Edit</a>	<a href="#">Hon. Jack Quinn</a>	<a href="#">NY State Assembly Members</a>			543 Legislative Office Building	Albany	NY	12248-0001
<a href="#">Edit</a>	<a href="#">Mr. Jack Rosenthal</a>	<a href="#">New York Times Foundation</a>			229 West 43rd Street	New York	NY	10036
<a href="#">Edit</a>	<a href="#">Jack Doyle</a>	<a href="#">New Settlement Apartments</a>	(718) 716-8000 x123	<a href="mailto:j.doyle@newsettlement.org">j.doyle@newsettlement.org</a>	1512 Townsend Avenue	Bronx	NY	10452
<a href="#">Edit</a>	<a href="#">Mr. Jack Krauskopf</a>	<a href="#">Baruch College</a>	(646) 660-6724	<a href="mailto:james_krauskopf@baruch.cuny.edu">james_krauskopf@baruch.cuny.edu</a>	135 East 22nd St., Room 915 One Bernard Baruch Way, Box D-901	NY	NY	10010
<a href="#">Edit</a>	<a href="#">Mr. Jack Lund</a>	<a href="#">YMCA of Greater New York</a>	(212) 630-9600	<a href="mailto:jlund@ymcancyc.org">jlund@ymcancyc.org</a>	5 West 63rd Street 6th Floor	New York	NY	10023

To update the Contact, click **Edit**, update the necessary fields, and press **Save**.

Contact

Mr. Jack Krauskopf

Customize Page | Edit Layout | Printable View | Help for

Show Chatter Follow

Donations [1] | Activity History [0] | Open Activities [0] | Campaign History [1] | Notes & Attachments [0]

Contact Detail

Edit

Delete

Clone

Sharing

Request Update

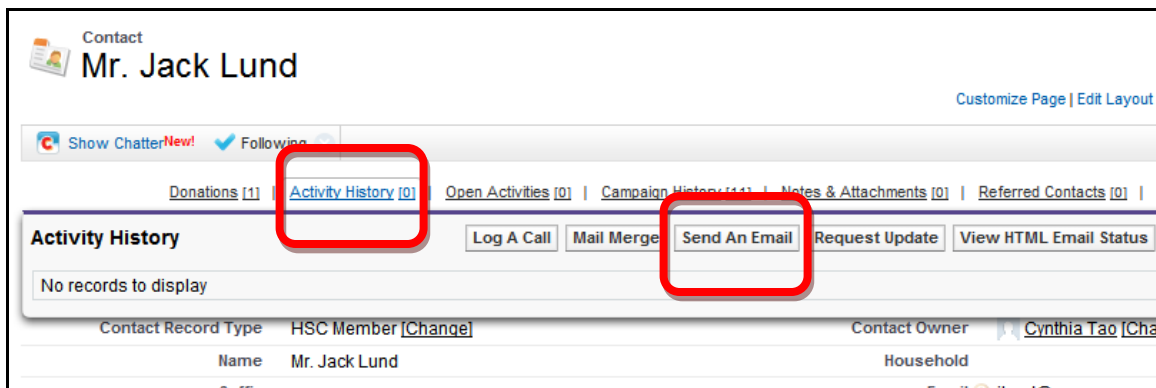
Add Service Sites

▼ Contact Details

Contact Record Type	Default Contact [Change]	HiddenName	Jack
Name	Mr. Jack Krauskopf	Contact Owner	Cynthia Tao [Change]
Suffix		Household	
Title	Distinguished Lecturer	Birthdate	
Status	Current	Email	<a href="mailto:james_krauskopf@baruch.cuny.edu">james_krauskopf@baruch.cuny.edu</a>
Nickname		Email Opt Out	<input type="checkbox"/>
Account Name	<a href="#">Baruch College</a>	Phone	(646) 660-6724
Academic Titles		Direct Phone	
Newsletter	<input type="checkbox"/>	Direct Phone Ext.	
Referred by (Text)		Do Not Call	<input type="checkbox"/>
Referred by (Contact)		Fax	
Referred by (Organization)		Fax Opt Out	<input type="checkbox"/>
Notes	NY	Past Honoree	<input type="checkbox"/>
		Michael List	<input checked="" type="checkbox"/>
		Referral	<input type="checkbox"/>

## *How to Send an Email, Free-Form or Using a Template*

You may want to send an email through Salesforce in order to keep track of the email in the database or to use the email templates that have been created and stored in the database. To send an email to a single Contact, select the desired Contact (using the Search box to type in all or part of the Contact's name and selecting from search results). If you place the cursor over the **Activity History** link, you will see a list of boxes where you can track activities with the contact. You can choose to click on the **Send an E-mail** box.



If you are sending a free-form email, type in the Subject and Body text for the e-mail message you wish to send.

Task Help for this Page ?

## Send an Email

**Edit Email** | = Required Information

Email Format: **HTML** [ [Switch to Text-Only](#) ]

To:

Related To: Organization

Additional To:

CC:

BCC:

Subject:

Body

**Formatting Controls** [ [How to use this](#) ]

Font  Size

If you want to use an existing email **Template**, click **Select Template**.

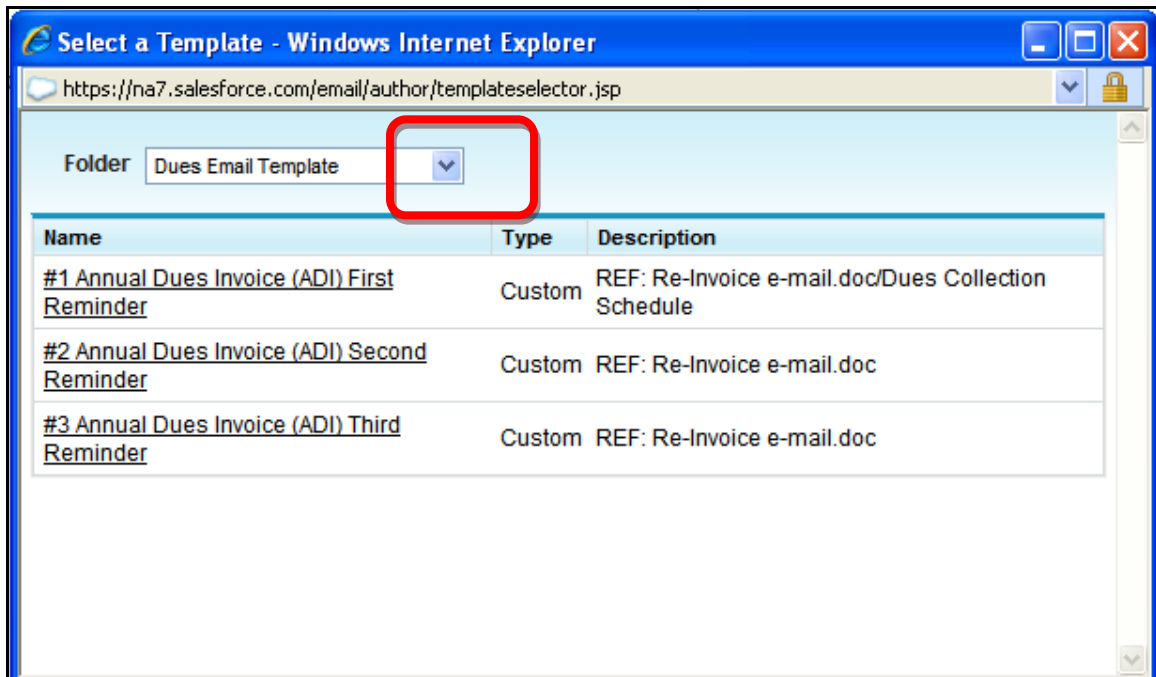
Subject:

Body

**Formatting Controls** [ [How to use this](#) ]

Font  Size

There are several folders that contain various types of email templates (e.g., Thank You emails, Dues emails, and Newsletter emails). You can click on the Folder drop-down arrow to see the types of templates that are available. Select the folder category that you want to use and a list of the specific email templates will appear in the box below the Folder drop down list.

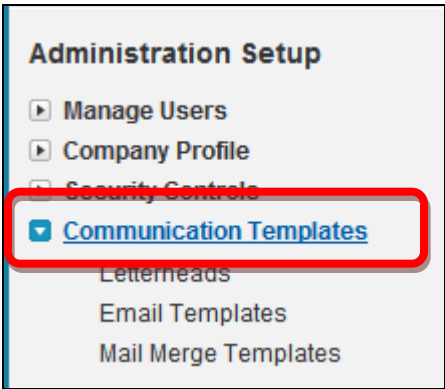
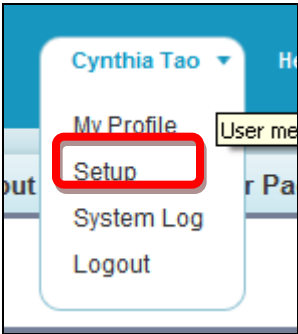


Click on the template that you want to send. You will see the email filled in with any appropriate information for the recipient, including organization name and address or other fields. Please preview the email and check for bracketed text (*[changeable text]*), which will need to be updated before you send the file.

Dear Zan:

By way of introduction, my name is Cynthia Tao and I work with the Human Services Council of New York City. [Allison Sesso and Chris Winward] asked me to send you some information about HSC. I invite Human Service Council to look into the benefits of HSC membership, and I'm including some links that will help you understand HSC's mission and initiatives as well as how we may serve Human Service Council.

To change the bracketed text go to *Your Name >> Setup >>Communication Templates >> Email Templates*



Select the folder containing your template. Click on the template name.

### Shazah Template

Below is a list of all your email templates in the folder selected. Click the new button to create a new text, HTML, Custom, or Visualforce email template when sending single emails. For mass emails, only text, HTML, and Custom templates may be used.

Folder: Shazah Template

Unfiled Public Email Templates  
My Personal Email Templates  
Dues Email Template  
Newsletter  
Shazah Template

Edit | Create New Folder

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

New Template

Action	Template Name	Template Type	Available For Use	Description	Owner	...
Edit   Del	Thank you	Custom	✓		CTao	4/
Edit   Del	WCID	Custom	✓	itting your Registration form.	CTao	4/
Edit   Del	#4 New Elected Board Member	Custom	✓		CTao	4/
Edit   Del	#4 HSC information email SS	Custom	✓		CTao	4/
Edit   Del	#6 5. Welcome to HSC Email SS	Custom	✓		CTao	4/
Edit   Del	#7 New M&D Committee Member	Custom	✓		CTao	4/
Edit   Del	#8 Registration-Enrollment FU e-mail	Custom	✓		CTao	4/
Edit   Del	#9 Thank you for Pro-media contribution	Custom	✓		CTao	3/

Press the button Edit HTML Version (to change templates that use HTML format) or Edit Text Version (to change plain text template).

Email Template Detail

Edit Properties

Edit HTML Version

Edit Text Version

Delete

Folder	Shazah Template		
Email Template Name	#10 8.Thank you for submitting your Registration form.	Available For Use	
Template Unique Name	X10_8_Thank_you_for_submitting_your_Registration_form	Last Used Date	
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)	Times Used	
Author	Cynthia Tao <a href="#">[Change]</a>		
Description			
Created By	Cynthia Tao, 12/21/2010 7:45 AM	Modified By	

Edit Properties

Edit HTML Version

Edit Text Version

Delete

Edit HTML Version

Email Template

Send Test and Verify Merge Fields

Subject Thank you for submitting your Registration form. Please tell us about your organization's service locations by filling o

HTML Preview

Dear {!Contact.HiddenName\_\_c},

Thank you for submitting your Enrollment and Registration forms, which we received [today]. At your

Change the bracketed text. Press the button **Save**.

Save

Preview

Cancel

Content

Subject **HSC Information**

HTML Body

```

<body>
<p>
Dear {!Contact.FirstName}:
</p>
<p>
By way of introduction, my name is {!User.Name} and I work with the
Human Services Council of New York City. [Allison Sesso and Chris
Winward] asked me to send you some information about HSC. I invite {!
Account.Name} to look into the benefits of HSC membership, and I'm
including some links that will help you understand HSC's mission and
initiatives as well as how we may serve {!Account.Name}.
<ul>
<li>You can learn more about HSC by downloading the latest version of

```

You will be then able to send the e-mail using the updated template.

You can find detailed information about templates on the Salesforce Documentation at [..\Official SF documentation\Email Template and Letterhead](#).

You can also attach a file by clicking **Attach File**.

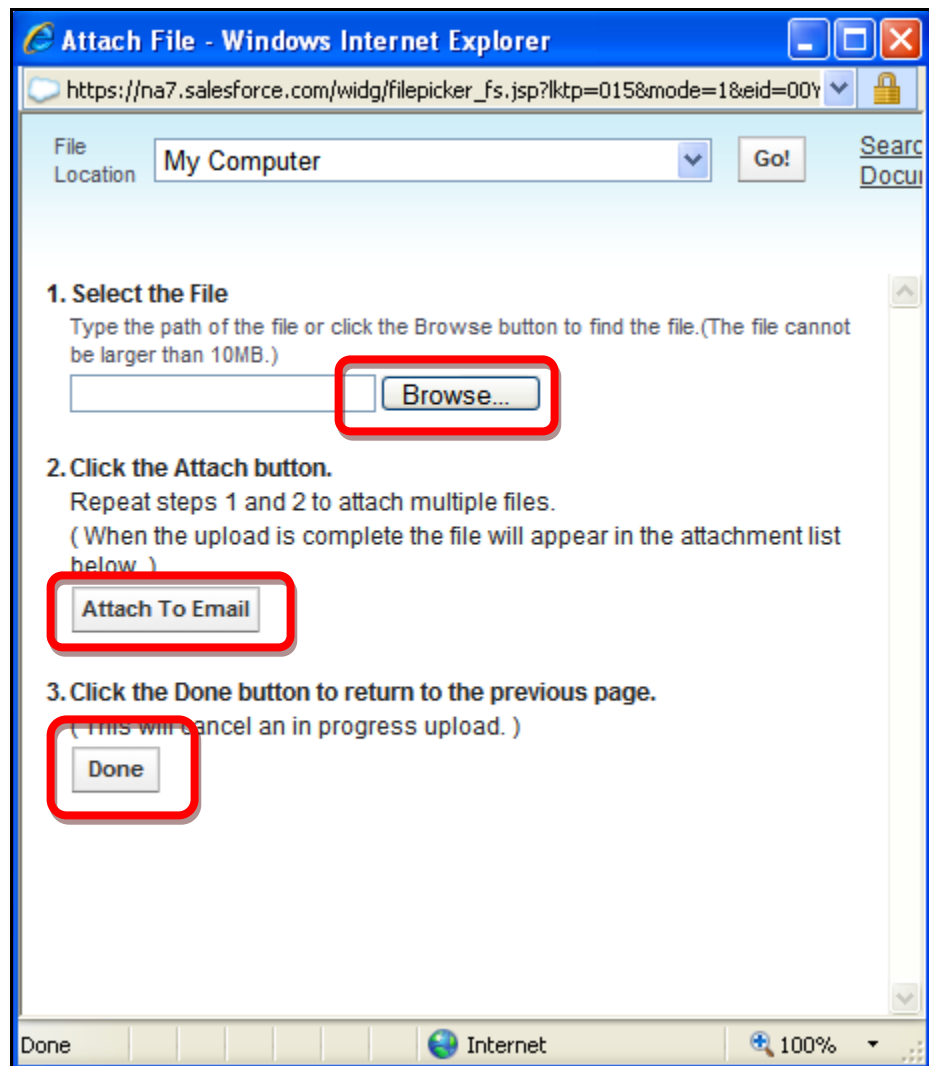


See our website at: <http://www.humanservicescouncil.org/>

Follow us on Twitter [@HSC\\_NY](#) and Facebook [Human Services Council of NYC \(HSC\)](#)

Send Select Template **Attach File** Cancel

You can select a file from your computer or from the shared library disk, as well as from a list of files stored in Salesforce (such as an HSC logo or signatures). Select the file you wish to attach, click **Attach To Email**, then click **Done**.



You can preview how the email will appear to the recipient, cancel the email or send it by pressing the appropriate buttons.



Send Select Template Attach File Preview Check Spelling Cancel

Email Format

HTML [ [Switch to Text-Only](#) ]

To

Zan Margolis am3030@nyu.edu ▼

Related To

Organization ▼

Additional To:

CC:

BCC:

paola.lazazzera@gmail.com

Subject

Body

Formatting Controls

[ [How to use this](#) ]

Font ▼

Size ▼

Dear Zan,

Thank you for your interest in the Human Services Council!

We are thrilled that you want to sign up for our quarterly e-newsletter.

Soon you will be getting important updates about HSC and member organizations, as well as timely news and information regarding the human services sector.

You can also add additional To, CC, and BCC recipients to the email.

Email Format

HTML [ [Switch to Text-Only](#) ]

To

Zan Margolis am3030@nyu.edu ▼

Related To

Organization ▼

Additional To:

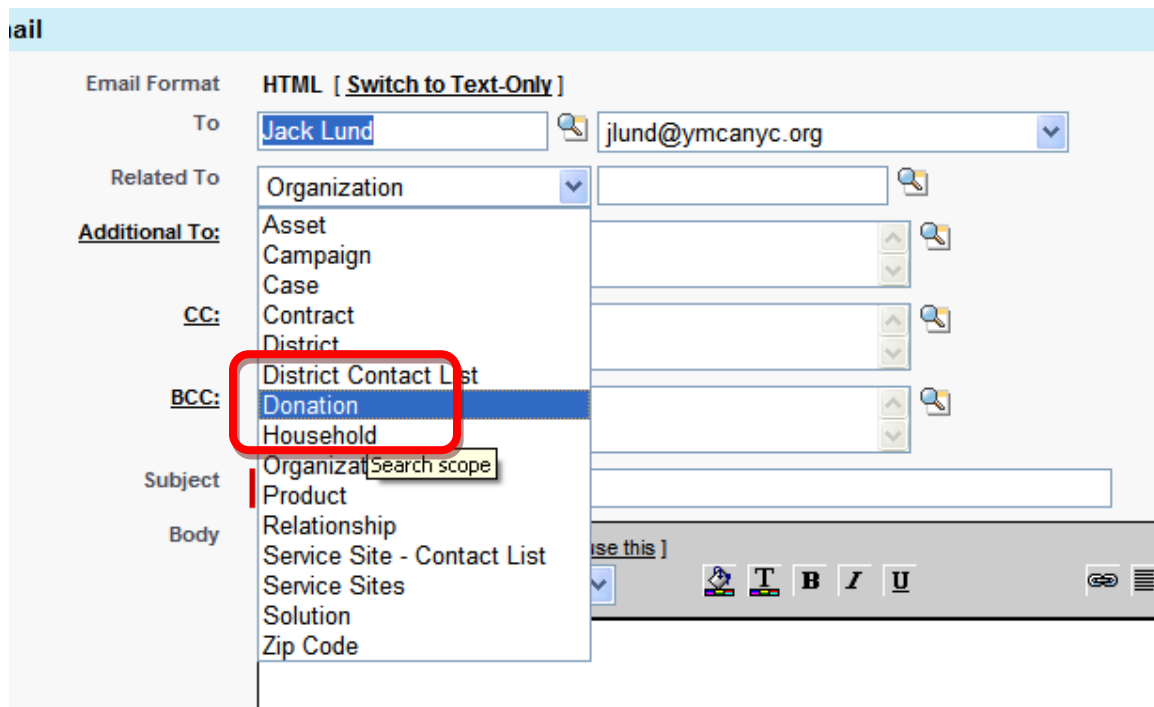
CC:

BCC:


paola.lazazzera@gmail.com

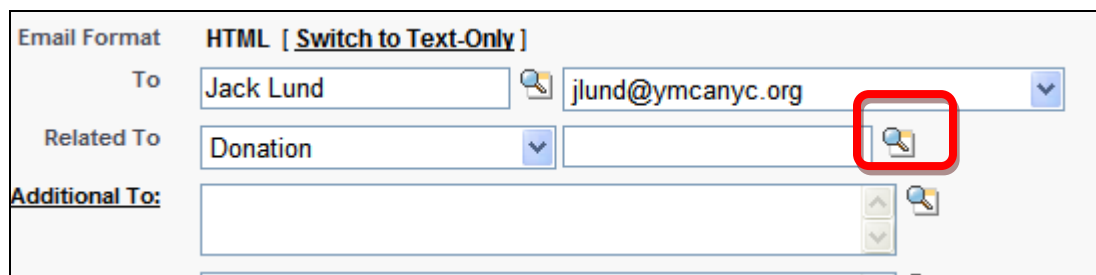
Subject

The field **Related To** is not required except for templates under the folder **Dues Email Template**. In this case you need to select **Donation** from the drop down list **Related To**.



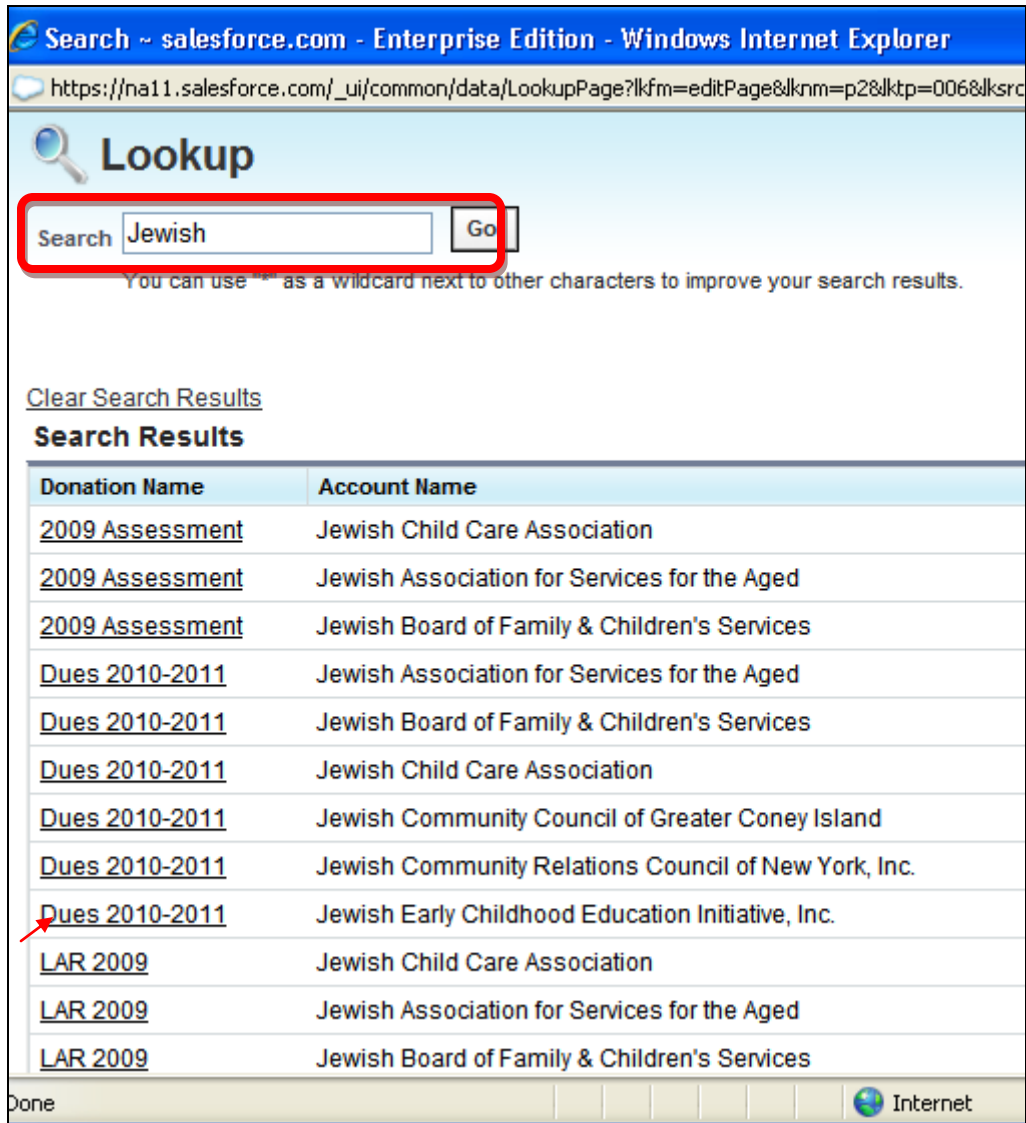
The screenshot shows an email composition interface. The 'Email Format' is set to 'HTML [ Switch to Text-Only ]'. The 'To' field contains 'Jack Lund' and 'jlund@ymcanyc.org'. The 'Related To' dropdown menu is open, showing a list of options: 'Organization', 'Asset', 'Campaign', 'Case', 'Contract', 'District', 'District Contact List', 'Donation' (highlighted in blue), 'Household', 'Organization Search scope', 'Product', 'Relationship', 'Service Site - Contact List', 'Service Sites', 'Solution', and 'Zip Code'. A red rectangle highlights the 'Donation' option. The 'Additional To:', 'CC:', and 'BCC:' fields are empty. The 'Subject' and 'Body' fields are also empty. A toolbar with various icons is visible at the bottom right.

Then click on the button 

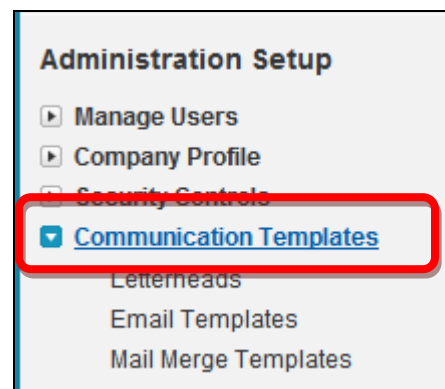
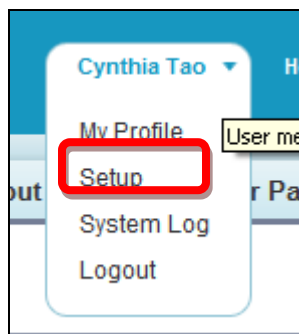


The screenshot shows the same email composition interface. The 'Related To' dropdown menu is open, and 'Donation' is selected. A red rectangle highlights the search icon (magnifying glass) next to the 'Donation' dropdown. The 'To' field contains 'Jack Lund' and 'jlund@ymcanyc.org'. The 'Additional To:', 'CC:', and 'BCC:' fields are empty. The 'Subject' and 'Body' fields are also empty. A toolbar with various icons is visible at the bottom right.

Type in the **Organization Name** (or part of it) in the field **Search**, press **Go!** Then select the Dues from the results list.



You can also preview an e-mail using a template going to ***Your Name >> Setup >>Communication Templates >> Email Templates***



Select the folder containing your template. Click on the template name.

### Shazah Template

Below is a list of all your email templates in the folder selected. Click the new button to create a new text, HTML, Custom, or Visualforce email template when sending single emails. For mass emails, only text, HTML, and Custom templates may be used.

Folder: Shazah Template [Edit](#) | [Create New Folder](#)

[Unfiled Public Email Templates](#) | [My Personal Email Templates](#) | [Dues Email Template](#) | [Newsletter](#) | [Shazah Template](#) | [Thank you](#) | [WCID](#)

[New Template](#)

Action	Template Name	Template Type	Available For Use	Description	Owner	Last Used
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">#10 8.Thank you for submitting your Registration form.</a>	Custom	✓		CTao	4/1/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">#11 New Elected Board Member</a>	Custom	✓		CTao	4/1/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">#12 New Elected Board Member</a>	Custom	✓		CTao	4/1/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">#13 New Elected Board Member</a>	Custom	✓		CTao	4/1/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">#14 New Elected Board Member</a>	Custom	✓		CTao	4/1/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">#15 New Elected Board Member</a>	Custom	✓		CTao	4/1/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">#16 New Elected Board Member</a>	Custom	✓		CTao	4/1/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">#17 New Elected Board Member</a>	Custom	✓		CTao	4/1/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">#18 New Elected Board Member</a>	Custom	✓		CTao	4/1/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">#19 New Elected Board Member</a>	Custom	✓		CTao	4/1/2010

Press the button **Send Test and Verify Merge Fields**.

### Email Template Detail

[Edit Properties](#) | [Edit HTML Version](#) | [Edit Text Version](#) | [Delete](#)

Folder: Shazah Template

Email Template Name: #10 8.Thank you for submitting your Registration form. Available For Use: ☒

Template Unique Name: X10\_8\_Thank\_you\_for\_submitting\_your\_Registration\_form Last Used Date:

Encoding: General US & Western Europe (ISO-8859-1, ISO-LATIN-1) Times Used:

Author: Cynthia Tao [\[Change\]](#)

Description:

Created By: Cynthia Tao, 12/21/2010 7:45 AM Modified By:

[Edit Properties](#) | [Edit HTML Version](#) | [Edit Text Version](#) | [Delete](#)

### Email Template

[Send Test and Verify Merge Fields](#)

Subject: Thank you for submitting your Registration form. Please tell us about your organization's service locations by filling out the following information.

HTML Preview

Dear {!Contact.HiddenName\_\_c},


Thank you for submitting your Enrollment and Registration forms, which we received [today]. At your



Type in the **Contact Name** in the **Field Recipient Record** (you can type in either first or last name or a portion of a name).


Preview Template - Windows Internet Explorer



https://na11.salesforce.com/p/email/template/EmailTemplatePreview?preview\_template\_

Preview the template with the following records:

Recipient Record: 

Contact  Lund 


Related To Record: 

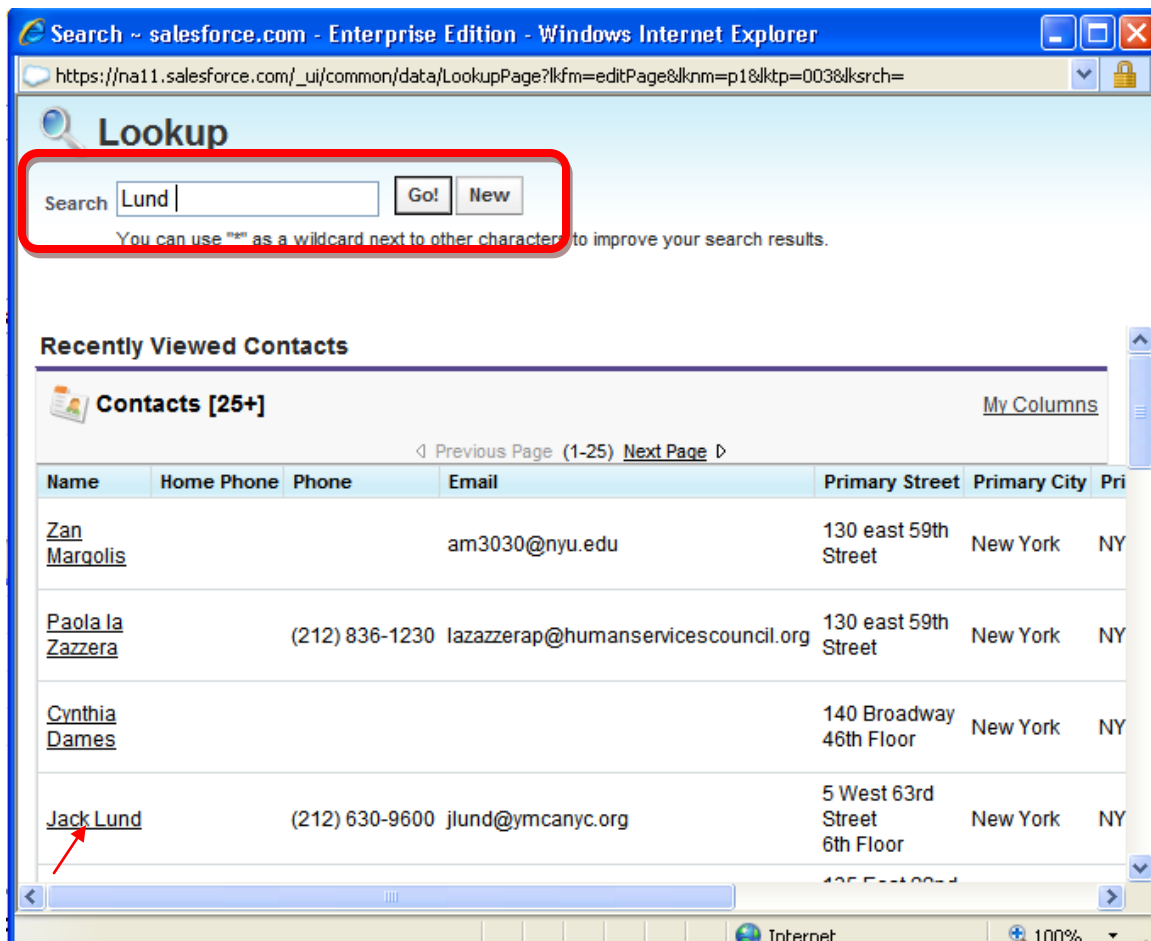
Organization  

☐ Send email preview to: paola.lazazzera@gmail.com

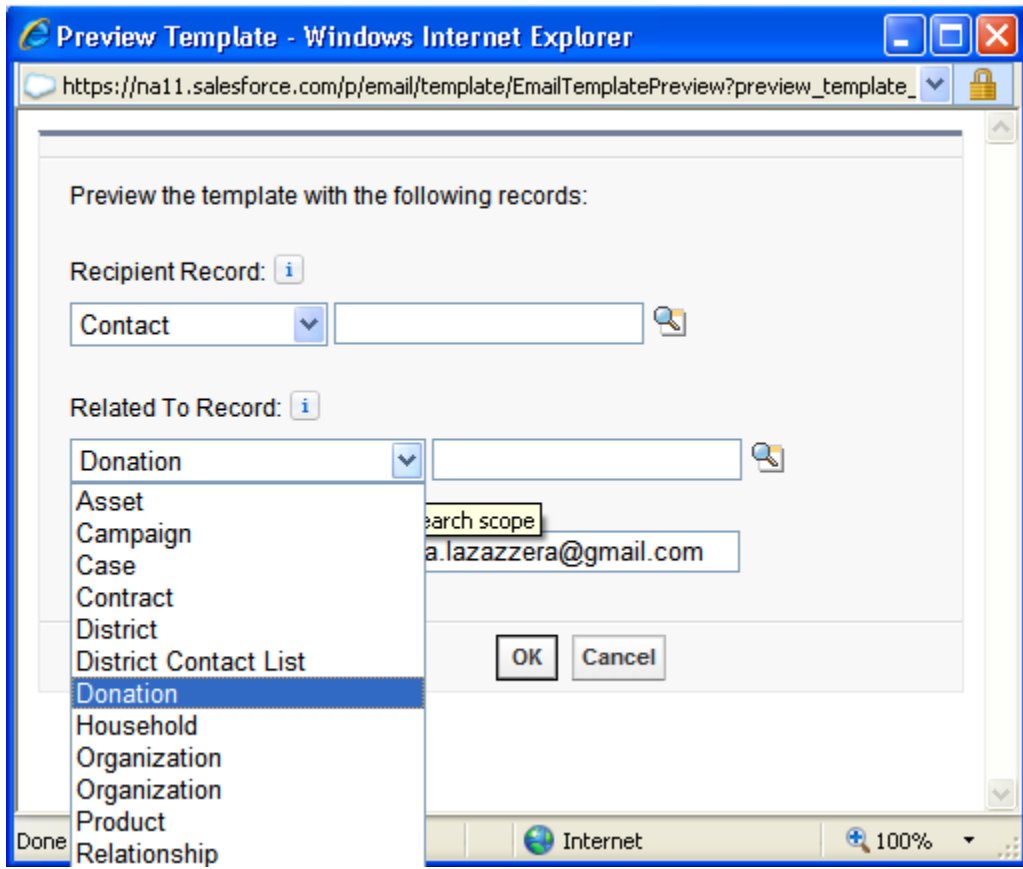
OK Cancel

Done Internet 100%

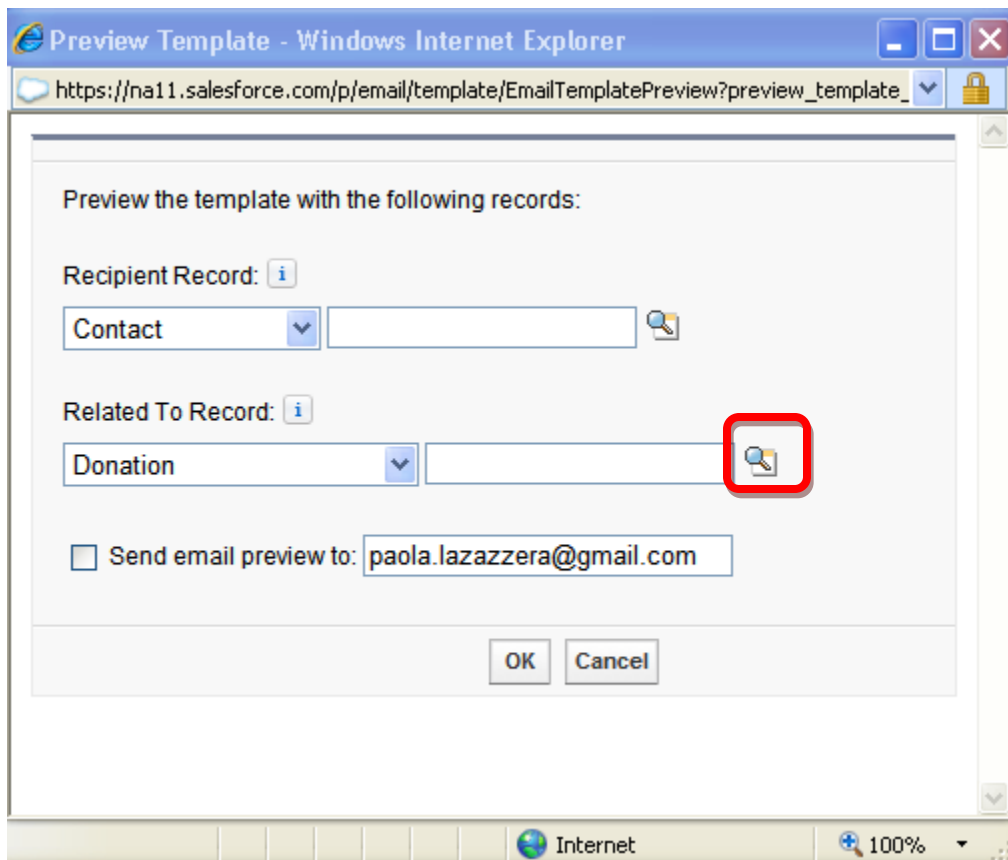
Click the button , type in the **Contact Name** in the **Search** (you can type in either first or last name or a portion of a name), press **Go!** Then select the **Contact Name** from the list of results.



The field **Related To Record** is not required for the template implemented by now except for templates under the folder **Dues Email Template**. In this case you need to select **Donation** from the drop down list **Related To Record**.



Then click on the button



Type in the **Organization Name** (or part of it) in the field **Search**, press **Go!** Then select the Dues from the results list.



Search ~ salesforce.com - Enterprise Edition - Windows Internet Explorer

https://na11.salesforce.com/\_ui/common/data/LookupPage?lkfm=editPage&lknm=p2&lktp=006&lksrc

## Lookup

Search

You can use "\*" as a wildcard next to other characters to improve your search results.

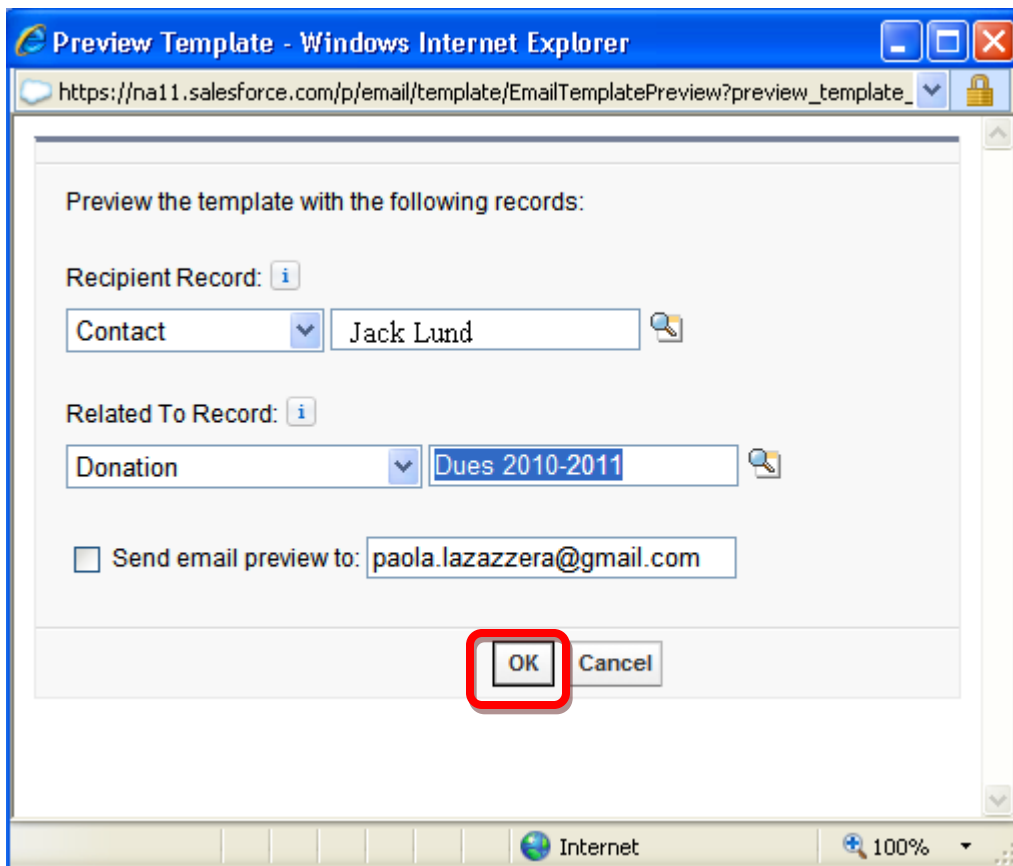
[Clear Search Results](#)


### Search Results

Donation Name	Account Name
<a href="#">2009 Assessment</a>	Jewish Child Care Association
<a href="#">2009 Assessment</a>	Jewish Association for Services for the Aged
<a href="#">2009 Assessment</a>	Jewish Board of Family & Children's Services
<a href="#">Dues 2010-2011</a>	Jewish Association for Services for the Aged
<a href="#">Dues 2010-2011</a>	Jewish Board of Family & Children's Services
<a href="#">Dues 2010-2011</a>	Jewish Child Care Association
<a href="#">Dues 2010-2011</a>	Jewish Community Council of Greater Coney Island
<a href="#">Dues 2010-2011</a>	Jewish Community Relations Council of New York, Inc.
<a href="#">Dues 2010-2011</a>	Jewish Early Childhood Education Initiative, Inc.
<a href="#">LAR 2009</a>	Jewish Child Care Association
<a href="#">LAR 2009</a>	Jewish Association for Services for the Aged
<a href="#">LAR 2009</a>	Jewish Board of Family & Children's Services

Done Internet

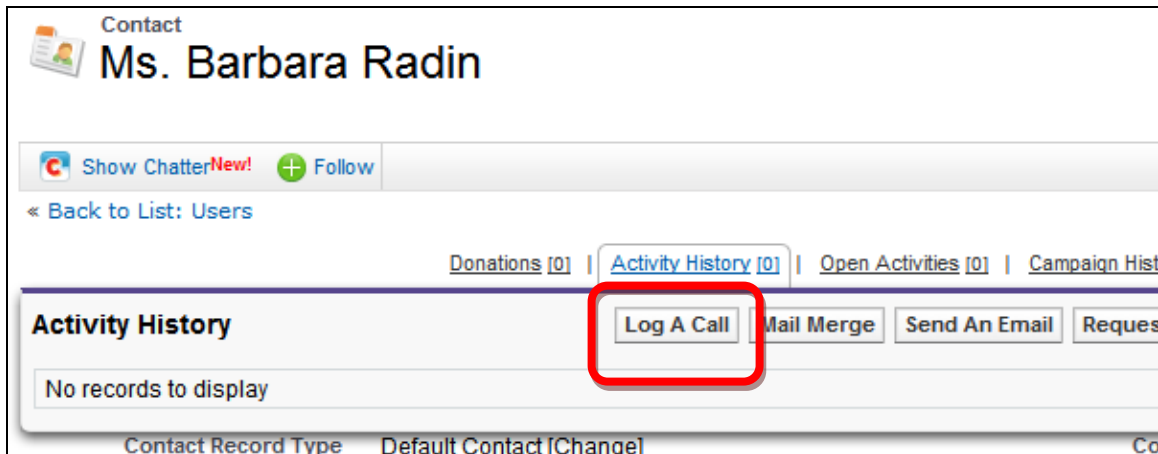
Press OK on the Preview Template Windows to preview the email.



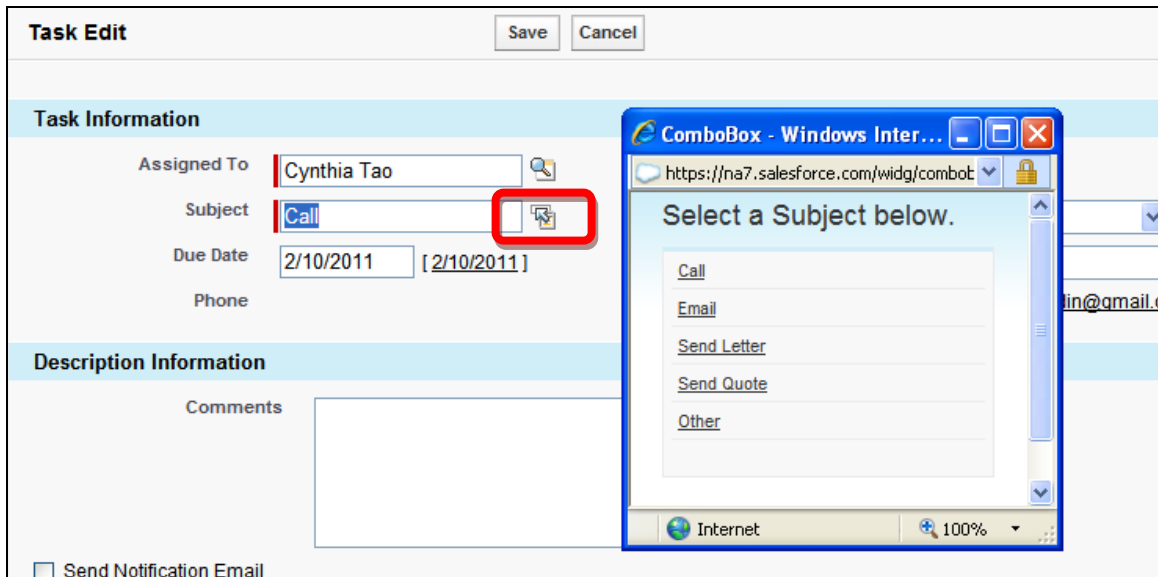
Email Template		Send Test and Verify Merge Fields		
Subject Membership Renewal Invoice				
HTML Preview				
<div style="text-align: center;"> The Voice of the Human Services Community</div> <hr/> <div style="text-align: center;"><b>Membership Renewal invoice</b> <b>Second Reminder</b> For membership with HCS from June 1, 2010 to June 30, 2011. <b>Organization:</b> YMCA of Greater New York</div> <hr/> <table border="0" style="width: 100%;"><tr><td style="width: 50%;"><b>Address:</b> 5 West 63rd Street 6th Floor 10023 New York, NY</td><td style="width: 50%;"><b>Current Membership Expire:</b> June 30, 2011</td></tr></table> <p><b>WebSite:</b> <a href="http://ymcanyc.org">http://ymcanyc.org</a></p>			<b>Address:</b> 5 West 63rd Street 6th Floor 10023 New York, NY	<b>Current Membership Expire:</b> June 30, 2011
<b>Address:</b> 5 West 63rd Street 6th Floor 10023 New York, NY	<b>Current Membership Expire:</b> June 30, 2011			

## *How to Track an Interaction*

If you want track an interaction with a member, funder, media person, vendor, or other contact, you can use Salesforce.com to track the activity (e.g. call phone, e-mail, printed letter). Place your cursor over **Activity History**, then click **Log A Call**.



On the subject line, you can click on the arrowhead symbol to the right of the Subject box to see a list of possible subjects you can choose from.



You can also type a specific Subject.

Task Information

Assigned To

Cynthia Tao

Subject

lunch with Jack Lund

Due Date

[ 4/19/2011 ]

Phone

(917) 887-7903

Priority

Normal

The Section **Schedule follow up task** contains the fields to track a scheduled follow up.

Schedule follow up task

Task Information

Assigned To

Cynthia Tao

Status

Not Started

Subject

Due Date

[ 4/19/2011 ]

Priority

Normal

Description Information

Comments


☐ Send Notification Email

Reminder

Reminder

☒ 4/19/2011 8:00 AM

Fill the fields, then press **Save**.

 **Log a Call**


---


**Task Edit**

**Save** **Cancel**

---

**Task Information**

Assigned To:  

Subject:  

Due Date:  [ 2/10/2011 ]

Phone:

Status: Completed

Name:

Related To:

Email: [barbara.radin@gmail.com](mailto:barbara.radin@gmail.com)

---

**Description Information**

Comments:


☐ Send Notification Email


---

**Schedule follow up task**

---

**Task Information**

Assigned To:  

Subject:  

Due Date:  [ 2/10/2011 ]

Priority:

Status:

### *How to Send a Mass Email Using a Template*



You may want to send out individualized emails to a large group of people – similar to using Mail Merge in Microsoft Office – you can use Salesforce to send emails to multiple recipients.

Click on the **Contacts** tab.

**Home** **Contacts** **Potential Members** **Organizations** **Donations** **Reports** **Households** **D**

**Create New...**

**Recent Items**

-  [Agenda for Children Tomorrow](#)
-  [Leslie Holmes](#)

**Contacts Home**

View:   [Edit](#)

**Recent Contacts**

Name	Home Phone	Phone	Mobile Phone

Click on the **Mass Email Contacts** link under the **Tools** section.

The screenshot displays a web interface with a contact list at the top and two side-by-side navigation menus below. The contact list shows two entries: 'Stricoff, Alan J.' with address '9 Dennis Drive Highland Mills New York' and 'Sulzberger, Judith P.' with address '146 Central Park West, 25E New York'. Below the list is a 'Show 10 items' link. The left menu, titled 'Reports', contains links for 'HTML Email Status Report', 'Partner Accounts', 'Mailing List', 'Account Teams', 'Contact History Report', and 'Bounced Contacts', followed by a 'Go to Reports >' link. The right menu, titled 'Tools', contains links for 'Import My Organizations & Contacts', 'Sync to Outlook', 'Import My Organization's Organizations & Contacts', 'Mass Delete Contacts', 'Mass Email Contacts' (highlighted with a red rectangle), 'Mass Mail Merge', 'Mass Stay-in-Touch', and 'Mass Add Contacts to Campaign'.

<a href="#">Stricoff, Alan J.</a>	9 Dennis Drive Highland Mills	New York
<a href="#">Sulzberger, Judith P.</a>	146 Central Park West, 25E	New York

[Show 10 items](#)

**Reports**

- [HTML Email Status Report](#)
- [Partner Accounts](#)
- [Mailing List](#)
- [Account Teams](#)
- [Contact History Report](#)
- [Bounced Contacts](#)

[Go to Reports >](#)

**Tools**

- [Import My Organizations & Contacts](#)
- [Sync to Outlook](#)
- [Import My Organization's Organizations & Contacts](#)
- [Mass Delete Contacts](#)
- [Mass Email Contacts](#)
- [Mass Mail Merge](#)
- [Mass Stay-in-Touch](#)
- [Mass Add Contacts to Campaign](#)

Select a **View** type from the drop-down menu. Then click **Go!**

You can choose from a **variety of view types**:

- **ED e-mail:** E-mail list of HSC Member Executive Directors
- **Administrative Assistants e-mail:** E-mail list of HSC Board Member Administrative Assistants
- **Financial Reps e-mail:** E-mail list of HSC Member Financial Reps
- **Board Members:** E-mail list of HSC Board Members
- **Executive Committee Members:** E-mail list HSC Executive Committee members
- **Board Members and Administrative Assistants:** E-mail list of both HSC Board members and Administrative Assistants
- **Executive Committee Members and Administrative Assistants:** E-mail list of both HSC Executive Committee members and Administrative Assistants

Note: Before using the **Board Members and Administrative Assistants** or **Executive Committee Members and Administrative Assistants** Views you may need to update the **Ex. Committee and Admin. Ass. E-mail** and **HSC Board and Admin. Ass. E-mail Campaigns Members** (See section **Update Campaign Members**).

Select a view below that contains the recipients to be included in this email.

**View:** ED e-mail Go! [Edit](#) | [Create New View](#)

Annual Dues Invoice (ADI)

**ED e-mail**

My Contacts

Reg. Form and Enr. Form missing

TEST

Available

B | C | D | E | F | G | H | I | J | K | L | M

You can click on the box in front of the contact's name to deselect any Contacts you don't wish to include in the mass e-mail.

**Step 1. Specify the recipients to include** Step

[Next](#)

Select a view below that contains the recipients to be included in this email.

**View:** ED e-mail Go! [Edit](#) | [Create New View](#) <Previous Page |

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**

Available 199 in

<input checked="" type="checkbox"/>	Contact: Name	Contact: Email	Organization: Account Name ↑	Contact: Title
<input checked="" type="checkbox"/>	Selvin, Linda	<a href="mailto:linda.selvin@dfa.state.ny.us">linda.selvin@dfa.state.ny.us</a>	Agenda for Children Tomorrow	Executive Director
<input checked="" type="checkbox"/>	Richtburg, Judith	<a href="mailto:jrichtburg@aiamsh.org">jrichtburg@aiamsh.org</a>	Aging in America Community Service	Executive Director
<input checked="" type="checkbox"/>	Barkan, Lou-Ellen	<a href="mailto:lbarkan@alzny.org">lbarkan@alzny.org</a>	Alzheimer's Association, New York City Chapter	President/CEO
<input checked="" type="checkbox"/>	Block, Marsha	<a href="mailto:mblock@aapa.org">mblock@aapa.org</a>	American Group Psychotherapy Association	Executive Director
<input checked="" type="checkbox"/>	Pror, Vikki	<a href="mailto:prorv@nvrredcross.org">prorv@nvrredcross.org</a>	American Red Cross in Greater New York	CEO
<input checked="" type="checkbox"/>	O. Cao	<a href="mailto:cao.o@aafederation.org">cao.o@aafederation.org</a>	Asian American Federation	Executive Director
<input checked="" type="checkbox"/>	Brown, Isaac	<a href="mailto:ibrown@balticstreet.org">ibrown@balticstreet.org</a>	Baltic Street AEH, Inc.	CEO
<input checked="" type="checkbox"/>	Federstein, Paul	<a href="mailto:paulf@bfnyc.org">paulf@bfnyc.org</a>	Barrier Free Living	Executive Director
<input checked="" type="checkbox"/>	Vasal, Eve	<a href="mailto:evaval@bhraqs.org">evaval@bhraqs.org</a>	BHRAGS Home Care Corp.	Executive Director
<input checked="" type="checkbox"/>	Batista, Hector	<a href="mailto:hbatista@biqsnyc.org">hbatista@biqsnyc.org</a>	Big Brothers/Big Sisters of New York City	Executive Director
<input checked="" type="checkbox"/>	Davis, Darwin M.	<a href="mailto:ddavis@blackequityalliance.org">ddavis@blackequityalliance.org</a>	Black Agency Executives	President
<input checked="" type="checkbox"/>	Davis, Darwin M.	<a href="mailto:ddavis@blackequityalliance.org">ddavis@blackequityalliance.org</a>	Black Equity Alliance	President/CEO

Click **Next**. You may need to scroll to the right to see the **Next** box.

**Step 1. Specify the recipients to include**

[Next](#) [Cancel](#)

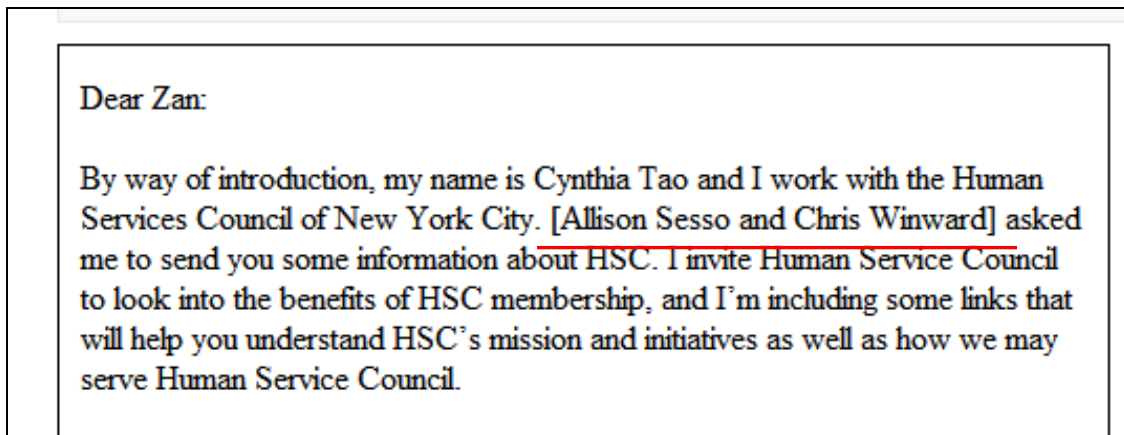
Select a view below that contains the recipients to be included in this email.

**View:** ED e-mail Go! [Edit](#) | [Create New View](#) <Previous Page | [Next Page](#)

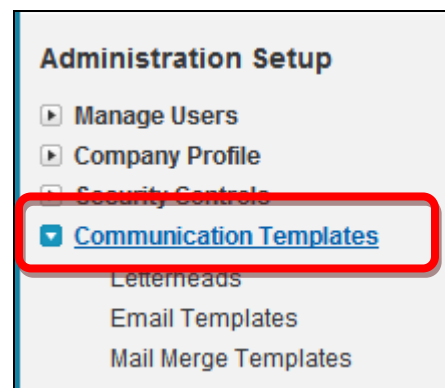
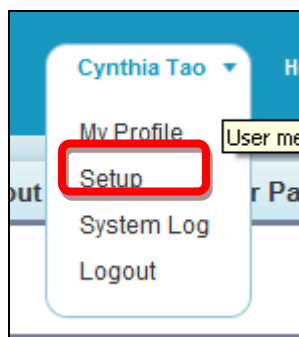
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

You will see a Folder with a drop-down arrow where you can select a **Template** type. The list of email templates that are that type will appear. Click the circle next to the template you want to use. You can click on Preview to see a sample email with the fields filled in.

You will see the email filled in with any appropriate information for the recipient, including organization name and address or other fields. Please preview the email and check for bracketed text (*[changeable text]*), which will need to be updated before you send the file.



To change the bracketed text go to *Your Name >> Setup >>Communication Templates >> Email Templates*



Select the folder containing your template. Click on the template name.



## Shazah Template

Below is a list of all your email templates in the folder selected. Click the new button to create a new text, HTML, Custom, or Visualforce email template when sending single emails. For mass emails, only text, HTML, and Custom templates may be used.

Folder: Shazah Template [Edit | Create New Folder](#)

[Unfiled Public Email Templates](#) [My Personal Email Templates](#) [Dues Email Template](#) [Newsletter](#) [Shazah Template](#)

[Thank you](#) [WCID](#) [Submitting your Registration form.](#) [#2 New EC Welcome](#) [#4 New Elected Board Member](#) [#5 HSC Informational email SS](#) [#6 5. Welcome to HSC Email SS](#) [#7 New M&D Committee Member](#) [#8 Registration-Enrollment FU e-mail](#) [#9 Thank you for Pro-media contribution](#)

[New Template](#)

Action	Template Name	Template Type	Available For Use	Description	Owner	Last Used
<a href="#">Edit</a>   <a href="#">Del</a>	Thank you	Custom	<input checked="" type="checkbox"/>		CTao	4/1/2010 10:00 AM
<a href="#">Edit</a>   <a href="#">Del</a>	WCID	Custom	<input checked="" type="checkbox"/>		CTao	4/1/2010 10:00 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Submitting your Registration form.	Custom	<input checked="" type="checkbox"/>		CTao	4/1/2010 10:00 AM
<a href="#">Edit</a>   <a href="#">Del</a>	#2 New EC Welcome	Custom	<input checked="" type="checkbox"/>		CTao	4/1/2010 10:00 AM
<a href="#">Edit</a>   <a href="#">Del</a>	#4 New Elected Board Member	Custom	<input checked="" type="checkbox"/>		CTao	4/1/2010 10:00 AM
<a href="#">Edit</a>   <a href="#">Del</a>	#5 HSC Informational email SS	Custom	<input checked="" type="checkbox"/>		CTao	4/1/2010 10:00 AM
<a href="#">Edit</a>   <a href="#">Del</a>	#6 5. Welcome to HSC Email SS	Custom	<input checked="" type="checkbox"/>		CTao	4/1/2010 10:00 AM
<a href="#">Edit</a>   <a href="#">Del</a>	#7 New M&D Committee Member	Custom	<input checked="" type="checkbox"/>		CTao	4/1/2010 10:00 AM
<a href="#">Edit</a>   <a href="#">Del</a>	#8 Registration-Enrollment FU e-mail	Custom	<input checked="" type="checkbox"/>		CTao	4/1/2010 10:00 AM
<a href="#">Edit</a>   <a href="#">Del</a>	#9 Thank you for Pro-media contribution	Custom	<input checked="" type="checkbox"/>		CTao	3/31/2010 10:00 AM

Press the button Edit HTML Version (to change templates that use HTML format) or Edit Text Version (to change plain text template).

### Email Template Detail

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#)

Folder: Shazah Template

Email Template Name: #10 8.Thank you for submitting your Registration form. Available For Use: ☒

Template Unique Name: X10\_8\_Thank\_you\_for\_submitting\_your\_Registration\_form Last Used Date:

Encoding: General US & Western Europe (ISO-8859-1, ISO-LATIN-1) Times Used:

Author: Cynthia Tao [\[Change\]](#)

Description:

Created By: Cynthia Tao, 12/21/2010 7:45 AM Modified By:

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#)

[Edit HTML Version](#)

### Email Template

[Send Test and Verify Merge Fields](#)

Subject: Thank you for submitting your Registration form. Please tell us about your organization's service locations by filling o

HTML Preview

Dear {!Contact.HiddenName\_\_c},

Thank you for submitting your Enrollment and Registration forms, which we received [today]. At your

Change the bracketed text. Press the button **Save**.

Save Preview Cancel

Content

Subject **HSC Information**

HTML Body

```
<body>
<p>
Dear {!Contact.FirstName}:
</p>
<p>
By way of introduction, my name is {!User.Name} and I work with the
Human Services Council of New York City. [Allison Sesso and Chris
Winward] asked me to send you some information about HSC. I invite {!
Account.Name} to look into the benefits of HSC membership, and I'm
including some links that will help you understand HSC's mission and
initiatives as well as how we may serve {!Account.Name}.
<ul>
<li>You can learn more about HSC by downloading the latest version of

```

You will be then able to send the e-mail using the updated template.

You can find detailed information about templates on the Salesforce Documentation at [..\\Official SF documentation\\Email Template and Letterhead](#).

When you are sure you have selected the correct email template, click **Next**.

Mass Email Template Selection [Help for this](#)

Step 2. Select an email template Step

Previous Next

Please select an email template to use. To create a new template, you must exit this mass email process and create the new template in your personal setup s

Folder **Dues Email Template**

Preview	Name	Type	Description
<a href="#">Preview</a>	<input checked="" type="radio"/> #1 Annual Dues Invoice (ADI) First Reminder	Custom	REF: Re-Invoice e-mail.doc/Dues Collection Schedule
<a href="#">Preview</a>	<input type="radio"/> #2 Annual Dues Invoice (ADI) Second Reminder	Custom	REF: Re-Invoice e-mail.doc
<a href="#">Preview</a>	<input type="radio"/> #3 Annual Dues Invoice (ADI) Third Reminder	Custom	REF: Re-Invoice e-mail.doc

Previous **Next**

Insert a **Mass E-mail Name**, then click **Send**.

Step 3. Review and confirm

Step 3

Previous Send

You currently have 0 recipient(s) selected to receive this email.

**Processing Options** | = Required Information

BCC me on one message ☒

Store an activity for each message ☒

Mass Email Name

**Delivery Options**

☒ Send now

☐ Schedule for delivery on 2/10/2011 9:28 AM Time Zone (GMT-08:00) Pacific Standard Time (America/Los\_Angeles)

Previous Send

Note: **Only 250 e-mails can be sent at a time.** If your view contains more than 250 records, the following message will be displayed.

The view that you specified exceeds the maximum of 250. Please narrow your search criteria by editing the view or create a new view.

Please go to **Salesforce.com Help** for further information:

<https://help.salesforce.com/apex/HTViewSolution?id=103741&language=en>

(Knowledge Article Number: 103741)

Also you can only send mass e-mails **to a maximum of 1000 external e-mail addresses per day.**

You will need to break your email distribution list into a maximum of 250 names per email by deselecting names – or by filtering the list of names.

You can filter a list of names clicking on the **Edit** link after selecting the view from the drop down list **View**.

**Step 1. Specify the recipients to include**

Select a view below that contains the recipients to be included in this email.

View: Executive Committee and Admin. Ass Go Edit | Create New View

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

Then specify you filter in the Section Step 1. **Enter Filter Criteria**

**Step 1. Enter View Name**

View Name: Executive Committee and Admin. Ass

Created By: Cynthia Tao, 2/10/2011 10:31 AM Modified By: Cynthia Tao, 2/10/2011 10:31 AM

**Step 2. Specify Filter Criteria**

Filter By Owner: ☒ All Contacts ☐ My Contacts

Filter By Campaign (Optional):  
Campaign Name: Ex. Committee and Admin

Filter By Additional Fields (Optional):

Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Add Filter Logic...](#)

Press **Save**.

**Contacts**

## Edit View

Save Save As Delete Cancel

**Step 1. Enter View Name**

View Name: Executive Committee and Admin. Ass

Created By: Cynthia Tao, 2/10/2011 10:31 AM Modified By: Cynthia Tao, 2/10/2011 10:31 AM

You might find more information about filtering a list of name at

[https://help.salesforce.com/apex/HTViewHelpDoc?id=reports\\_filter.htm&language=en](https://help.salesforce.com/apex/HTViewHelpDoc?id=reports_filter.htm&language=en)

## Update Campaign Members

The following paragraph will describe the process to update the lists **Ex. Committee and Admin. Ass. E-mail** and **HSC Board and Admin. Ass. E-mail Campaigns Members**.

Type in the name of the list (**Ex. Committee and Admin. Ass. E-mail**) in the field **Search**, then press the button **Search**.

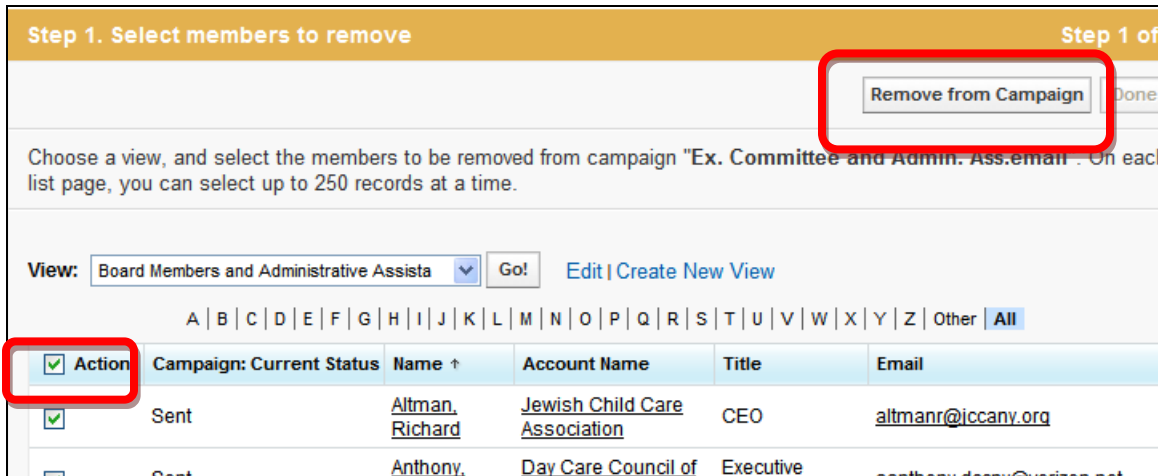
Then press the button **Manage Members**.

The screenshot shows the Salesforce interface for a campaign named "Ex. Committee and Admin. Ass. email". At the top, there is a search bar with the text "Ex. Committee and Admin. Ass. email" and a "Search" button. Below the search bar, there is a navigation bar with tabs for "Potential Members", "Organizations", "Donations", "Reports", "Households", "Dashboards", "Campaigns", and "About". The "Campaigns" tab is selected. On the left side, there is a sidebar with a "Go!" button and a "Campaign" icon. The main content area shows the campaign details for "Ex. Committee and Admin. Ass. email". The details include: Campaign Owner: Cynthia Tao (Change), Campaign Name: Ex. Committee and Admin. Ass. email (View Hierarchy), Description: mailing list of HSC Committee members + assistant, Active: checked, Type: Other. On the right side, there are buttons for "Edit", "Delete", "Clone", "Manage Members" (highlighted with a red box), "Advanced Setup", and "Create". Below these buttons, there are statistics: Total Potential Members: 0, Converted Potential Members: 0, Total Contacts: 31, Total Responses: 0, and Num Sent: 0.

Click on the link **Remove Members – Existing Contacts**

The screenshot shows the "Mass Remove Campaign Members" section. It has a title "Mass Remove Campaign Members" and two options: "Remove Members - Existing Contacts" (highlighted with a red box) and "Remove Members - Existing Potential Members". The "Remove Members - Existing Contacts" option has a description: "Mass Remove existing contacts from a campaign all at once." The "Remove Members - Existing Potential Members" option has a description: "Mass Remove existing potential members from a campaign all at once."

Check the checkbox **Action**, then press the button **Remove from Campaign**.



Step 1. Select members to remove Step 1 of 1

☐ **Action**

Choose a view, and select the members to be removed from campaign "Ex. Committee and Admin. Ass.email". On each list page, you can select up to 250 records at a time.

View: Board Members and Administrative Assista  [Edit](#) | [Create New View](#)

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**

<input checked="" type="checkbox"/>	Action	Campaign: Current Status	Name ↑	Account Name	Title	Email
<input checked="" type="checkbox"/>		Sent	<a href="#">Altman, Richard</a>	<a href="#">Jewish Child Care Association</a>	CEO	<a href="mailto:altmanr@jccany.org">altmanr@jccany.org</a>
<input type="checkbox"/>		Sent	<a href="#">Anthony,</a>	<a href="#">Day Care Council of</a>	Executive	<a href="mailto:anthony.deeny@verizon.net">anthony.deeny@verizon.net</a>

Click on the button **Done**




Remove Members from a List of Contacts help for this page

Step 1. Select members to remove Step 1 of 1

Choose a view, and select the members to be removed from campaign "Ex. Committee and Admin. Ass.email". On each list page, you can select up to 250 records at a time.

Go to the report **Ex. Committee and Admin. Ass. E-mail (Report>>SF System Admin>> Ex. Committee and Admin. Ass. E-mail.**

Click on **Export Details**

 **Ex. Committee and Admin. Ass. E-mail**

Report Generation Status: Complete


Report Options:

Summarize information by:  Show

Time Frame  
Date Field

Click on **Export**

Home Contacts Potential Members Organizations Donations **Reports** Househo

 **Ex. Committee and Admin. Ass. E-mail**

**Export Report**

Export File Encoding

Export File Format

Save the file on your PC. Then Click on the button **Done**.

Home   Contacts   Potential Members   Organizations   Donations   **Reports**   Households

## Ex. Committee and Admin. Ass. E-mail

**Export Report**

Export File Encoding: ISO-8859-1 (General US & Western European, ISO-LATIN-1) ▼

Export File Format: Excel Format .xls ▼

Export   **Done**

Export

Click again on the button **Manage Members**

Ex. Committee and Admin. Ass. email   Search   Help & Training   My Profile   Setup   System Log   Logout

Search Options...

Potential Members   Organizations   Donations   Reports   Households   Dashboards   **Campaigns**   About

Go!   Campaign   Ex. Committee and Admin. Ass. email

Customize Page | Edit Layout | Printable View | Help

« Back to List: Installed Package

[Edit](#)   [Delete](#)   [Clone](#)   **[Manage Members](#)**   [Advanced Setup](#)   [Create](#)

[Delete Dues](#)   [Add Donor to Campaign](#)

**Campaign Detail**


Campaign Owner	<a href="#">Cynthia Tao</a> <a href="#">[Change]</a>	Total Potential Members	0
Campaign Name	Ex. Committee and Admin. Ass. email <a href="#">[View Hierarchy]</a>	Converted Potential Members	0
Description	mailing list of HSC Committee members + assistant	Total Contacts	31
Active	<input checked="" type="checkbox"/>	Total Responses	0
Type	Other	Num Sent	0


Click on the link **Add Members –Import File**



Mass Add Campaign Members	
<a href="#">Add Members - Existing Contacts</a>	Add existing contacts to this campaign all at once.
<a href="#">Add Members - Existing Potential Members</a>	Add existing potential members to this campaign all at once.
<a href="#">Add Members - Import File</a>	Import a CSV file of new potential members and associate them with this (Import Potential Members)

Click on **Update & Add Campaign Members**





Please choose an import option below.

### Campaign Member Import Options

- **Import potential members** - Upload new campaign members.
- **Update & Add Campaign Members** - Modify status for existing campaign members and add new campaign members.

Click on the button **Browse** to import the file you just saved. Then click on **Next**.

Step 1 of 3: Upload the File

Campaign Update Wizard

Next >

With salesforce.com, you can associate Leads or Contacts with a particular campaign.

1. Create a Contact report or Lead report of the records you want to update.
2. Include the following fields in the report: Contact ID or Lead ID
3. Export the report to Excel as a CSV file, and then open it in Excel.
4. If the Contact ID or the Lead ID have different member statuses, add a Member Status column to the file.
5. Populate the Member Status column with one of the standard statuses. Any invalid or blank statuses will be replaced with the default status specified below.
6. Choose the file to **import** into **salesforce.com**:  
**Note:** it may take a few minutes to upload your file, depending on the file size and your connection speed  

Browse...
7. Assign all records to this campaign: Ex. Committee and Admin. Ass.email
8. Use this default member status: 

Sent
9. The selection below is set to a default value. Override this default value only if your import file has a different character encoding. 

ISO-8859-1 (General US & Western European, ISO-LATIN-1)
10. ☐ Trigger workflow rules for new and updated records

Next >

Select **Contact ID** in the field **Record ID** as shown in the following box. Then press **Next**.

< Back   Next >

In the list below, select the field in your import file that contains the record IDs and member statuses. Once you have finished, click **Next**:

**Campaign Member Information**

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Record Id:	-- none selected --	Status:	-- none selected --
<b>Custom Fields</b>			
Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Attended:	-- none selected --	Notes:	-- none selected --
Required Form	First Name (col 0)	Confirmed:	-- none selected --
Returned:	Last Name (col 1)	id:	-- none selected --
Lead:	Executive Director/CEO (col 2)	Add Received:	-- none selected --
	Contact ID (col 3)	Member:	-- none selected --
	Title (col 4)	Source:	-- none selected --
	Account ID (col 5)	Second Invoiced	-- none selected --
	Board (col 6)	Date:	-- none selected --
	Account Name (col 7)	COMP:	-- none selected --
	-- none selected --	Referred by (Text):	-- none selected --
#:	-- none selected --		
Registration Date:	-- none selected --		
HSCMember:	Not Accessible		
First Invoiced Date:	-- none selected --		
Third Invoiced Date:	-- none selected --		
Hidden_Referred_by_id:	Not Accessible		
Hidden_Returned_Form:	Not Accessible		

< Back   **Next >**

Click on the button **Import Now**.

**salesforce.com** 

Step 3 of 3: Review and Confirm ... Campaign Update Wizard

**Status: No column for the Status is specified**  
**WARNING:** If you continue with this import, the Status of all imported records will be set to the default value on the previous page. If this is not acceptable, please click the Back button to map the Status field.

Press **Import Now!** to submit this import request to salesforce.com.

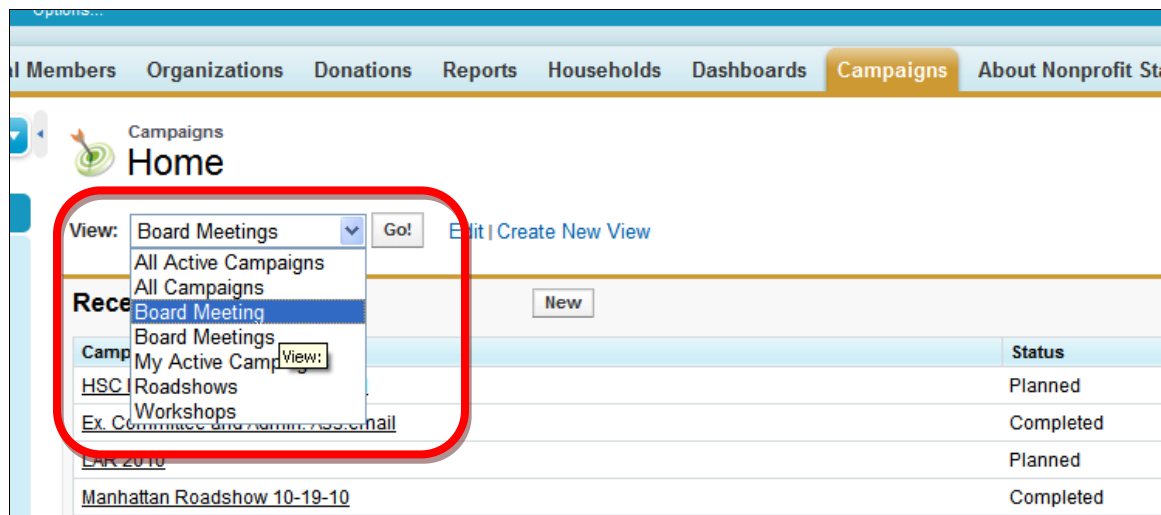
< Back   **Import Now!**

Repeat the same step for the list **HSC Board and Admin. Ass. E-mail Campaigns Members** ( Note: The report name for this list under the folder SF System Admin is truncated to [HSC Board and Admin. Ass. E-mail Campaig](#) as the System doesn't allow long text for Report Name).


## *Tracking Board Member Commitments*

### **Board Meeting Attendance or Return of Required Forms**

To track Board Member Committee attendance or their return of required Board forms, click on the **Campaigns** tab, click on the down arrow next to View, select **Board Meeting** from the drop-down list, and click **Go**.



Select the Board Meeting you want to track attendance for by clicking on the item in the **Campaign Name** column.

 <div>Board Meetings <span>▼</span></div> <div>New Campaign</div>			
<a href="#">Create New View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Refresh</a> <div>A   B   C   D   E   F   G   H   I</div>			
Action	Campaign Name ↑	Start Date	End Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">January 2011 Board Meeting</a>	1/12/2011	1/12/2011
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">June 2010 Nomination Meeting</a>	6/1/2010	6/1/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">June 2011 Annual Membership Meeting</a>	11/10/2010	11/10/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">March 2011 Board Meeting</a>	3/9/2011	3/9/2011
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">November 2010 Board Meeting</a>	11/10/2010	11/10/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">September 2010 Board Meeting</a>	9/1/2010	9/1/2010

If you move the cursor on the **Campaign Members** link you will see the list of attendees.


Campaign

January 2011 Board Meeting

[« Back to List: Campaigns](#)

[Campaign Hierarchy \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[1\]](#) | [Attachments \[0\]](#)

[Donations \[0\]](#) | [Campaign Members \[5+\]](#)

 Campaign Members

Manage Members ▼

Campaign Members

Action	Type	Company	Status	First Name	Last Name	Email	Title
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Alzheimer's Association, New York City Chapter	Sent	<a href="#">Lou-Ellen</a>	<a href="#">Barkan</a>	<a href="#">lbarkan@alzny.org</a>	President/CEO
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Asian American Federation	Sent	<a href="#">Cao</a>	<a href="#">Q</a>	<a href="#">cao.o@aafederation.org</a>	Executive Director
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Black Equity Alliance	Sent	<a href="#">Darwin M.</a>	<a href="#">Davis</a>	<a href="#">ddavis@blackequityalliance.org</a>	President/CEO
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	CAMBA	Sent	<a href="#">Joanne M.</a>	<a href="#">Oplustil</a>	<a href="#">joanneo@camba.org</a>	ED
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Catholic Charities Brooklyn and Queens	Sent	<a href="#">Robert</a>	<a href="#">Siebel</a>	<a href="#">rsiebel@ccbq.org</a>	Executive Director/CEO

[Show 5 more »](#) | [Go to list \(50+\) »](#)

If you want to see the entire list press the link **Go to list** at the bottom of the page.


Campaign

January 2011 Board Meeting

[« Back to List: Campaigns](#)

[Customize Page](#) | [Printable View](#) | [Help for this Page](#)

[Campaign Hierarchy \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[1\]](#) | [Attachments \[0\]](#) | [Donations \[0\]](#) | [Campaign Members \[5+\]](#)

 Campaign Members

Manage Members ▼

Campaign Members Help

Action	Type	Company	Status	First Name	Last Name	Email	Title	N
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Alzheimer's Association, New York City Chapter	Sent	<a href="#">Lou-Ellen</a>	<a href="#">Barkan</a>	<a href="#">lbarkan@alzny.org</a>	President/CEO	
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Asian American Federation	Sent	<a href="#">Cao</a>	<a href="#">Q</a>	<a href="#">cao.o@aafederation.org</a>	Executive Director	
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Black Equity Alliance	Sent	<a href="#">Darwin M.</a>	<a href="#">Davis</a>	<a href="#">ddavis@blackequityalliance.org</a>	President/CEO	
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	CAMBA	Sent	<a href="#">Joanne M.</a>	<a href="#">Oplustil</a>	<a href="#">joanneo@camba.org</a>	ED	
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Catholic Charities Brooklyn and Queens	Sent	<a href="#">Robert</a>	<a href="#">Siebel</a>	<a href="#">rsiebel@ccbq.org</a>	Executive Director/CEO	
<a href="#">Show 5 more »</a>   <a href="#">Go to list (50+) »</a>								

The list is also available at the bottom of the page in the Section **Campaign Members** clicking on the link Campaign Members.

The screenshot shows the 'January 2011 Board Meeting' page. At the top, there is a navigation bar with links: 'Campaign Hierarchy (1)', 'Open Activities (0)', 'Activity History (1)', 'Attachments (0)', 'Donations (1)', and 'Campaign Members (5+)' which is highlighted with a red box. Below this, the 'Campaign Members' section is visible, showing a table of members.

Action	Type	Company	Status	First Name	Last Name	Email	Title
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Alzheimer's Association, New York City Chapter	Sent	Lou-Ellen	Barkan	lbarkan@alznyc.org	President/CEO
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Asian American Federation	Sent	Cao	Q	cao.o@aafederation.org	Executive Director
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Black Equity Alliance	Sent	Darwin M.	Davis	ddavis@blackequityalliance.org	President/CEO
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	CAMBA	Sent	Joanne M.	Oplustil	joanneo@camba.org	ED
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Catholic Charities Brooklyn and Queens	Sent	Robert	Siebel	rsiebel@ccbq.org	Executive Director/CEO

At the bottom of the table, there are links: 'Show 5 more »' and 'Go to list (50+) »'.

Click on the **Edit** link to update attendance information for each attendee. **Remove** will remove the Board Member from the list of participant.

The screenshot shows the 'Campaign Members' table. The 'Edit' link for the first member, Lou-Ellen Barkan, is highlighted with a red box.

Action	Type	Company	Status	First Name	Last Name	Email
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Alzheimer's Association, New York City Chapter	Sent	Lou-Ellen	Barkan	lbarkan@alznyc.org
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Asian American Federation	Sent	Cao	Q	cao.o@aafederation.org
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	Black Equity Alliance	Sent	Darwin M.	Davis	ddavis@blackequityalliance.org
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	CAMBA	Sent	Joanne M.	Oplustil	joanneo@camba.org

Select **Responded** in the **Status** box if the ED has confirmed attendance for the Board Meeting.

The screenshot shows the 'Campaign Member Edit' form. The 'Status' dropdown menu is open, and 'Responded' is selected. The form also shows 'Campaign' as 'TEST' and 'Contact' as 'C. Virginia Fields'.

**Campaign Member Edit** [Save] [Cancel]


**Campaign Member Information**

Campaign: TEST

Contact: C. Virginia Fields

Status: Sent  
Sent  
Responded

Check the **Attended** box if applicable, then click **Save**.

 Lou-Ellen Barkan (January 2011 Board Meeting)

---

**Campaign Member Edit** Save Cancel

---

**Campaign Member Information**

Campaign	January 2011 Board Meeting	Created Date	12/3/2010 12:30 P
Contact	Lou-Ellen Barkan	Last Modified Date	12/3/2010 12:30 P
Status	<span style="border: 1px solid red; padding: 2px;">Sent</span> <span style="font-size: 0.8em;">▼</span>	Notes	<div style="border: 1px solid #ccc; height: 30px;"></div>

---

**Meeting/Workshop/Events**

Registration Date	<div style="border: 1px solid #ccc; width: 100px; height: 20px;"></div>	[ 2/10/2011 11:36 AM ]	<span style="border: 2px solid red; padding: 2px;">Attended</span> <input type="checkbox"/>
			<span style="border: 2px solid red; padding: 2px;">Required Form Returned</span> <input type="checkbox"/>

---


LAR

## Create a New Board Meeting Campaign Entry

Click on the **Campaigns** Tab, and then click **New**.

Members Organizations Donations Reports Households Dashboards Campaigns About Nonprofit

---

 Campaigns  
**Home**

View: Board Meetings ▼ Go! [Edit](#) | [Create New View](#)


---

**Recent Campaigns** New

Campaign Name	Status
<a href="#">January 2011 Board Meeting</a>	Canceled
<a href="#">HSC Board and Admin. Ass. email</a>	Planned
<a href="#">Ex. Committee and Admin. Ass. email</a>	Completed

If you select the button **Go!**

You will see the screen shown below. From this view click the button **New Campaign**.

 <span>Board Meetings</span> <span>New Campaign</span>				
<a href="#">Create New View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Refresh</a>				
A   B   C   D   E   F   G   H   I   J   K   L   M   N   O				
Action	Campaign Name ↑	Start Date	End Date	Budgeted Cost
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">January 2011 Board Meeting</a>	1/12/2011	1/12/2011	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">June 2010 Nomination Meeting</a>	6/1/2010	6/1/2010	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">June 2011 Annual Membership Meeting</a>	11/10/2010	11/10/2010	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">March 2011 Board Meeting</a>	3/9/2011	3/9/2011	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">November 2010 Board Meeting</a>	11/10/2010	11/10/2010	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">September 2010 Board Meeting</a>	9/1/2010	9/1/2010	

Fill in the fields as necessary.

- Campaign name: A name to identify the board meeting (e.g., March 2011)
- Description: A brief description for the board meeting (optional)
- Active: check to make the Campaign visible to the Salesforce.com User (HSC employees)
- Type: select **Meeting** from the drop-down list



**New Campaign**

**Campaign Edit** [Save] [Save & New] [Cancel]

**Campaign Information**

Campaign Owner: Cynthia Tao

Campaign Name:

Description:

Active: ☐

Type:

Status:

Start Date:

End Date:

**Campaign Detail**

Expected Revenue:

Budgeted Cost:

Actual Cost:

Expected Response (%):

Other:

Meeting:

Workshop:

Roadshow:

Dues:

Fundraiser:

Media/PR:

Select the Status

- Planned: for upcoming board meetings
- In Progress (*please ignore this field when dealing with Board Meetings*)
- Completed: for past board meetings
- Canceled

Active ☐

Type --None--

Status **Planned**

Start Date --None-- [ 2/10/2011 ]

End Date In Progress [ 2/10/2011 ]

Completed

Canceled

Insert the Start Date (date of the Board Meeting).

Active ☐

Type --None--

Status Planned

Start Date [ 2/10/2011 ]

End Date [ 2/10/2011 ]

Press **Save**. You can leave the rest of the fields blank.

Campaign Edit

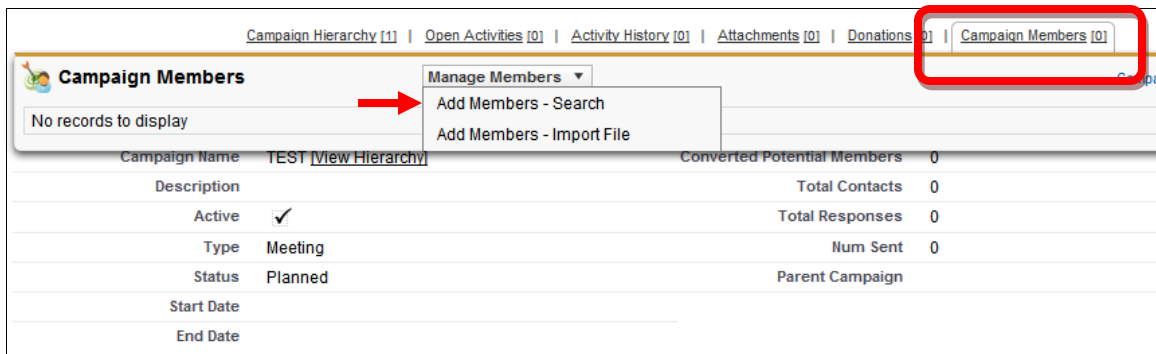
**TEST- Board Commit.**

**Campaign Edit** [ Save ] [ Save & New ] [ Cancel ]

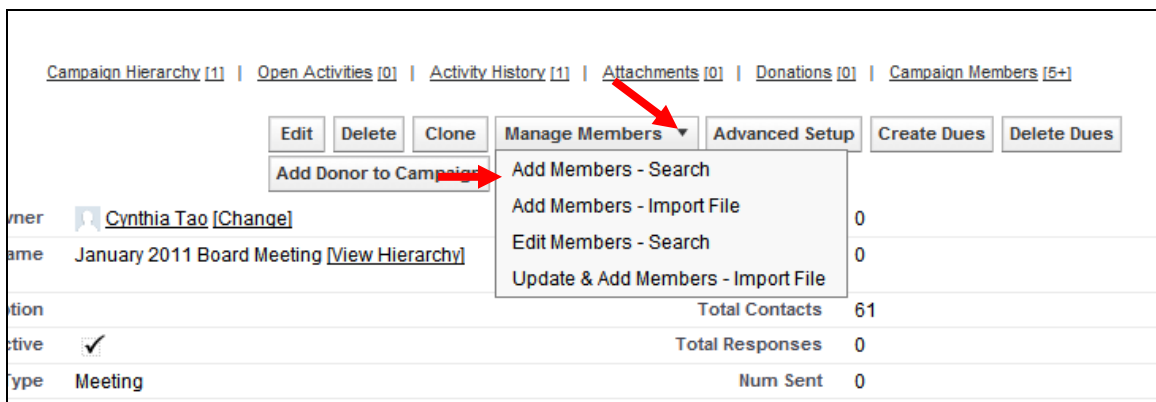
**Campaign Information**

Campaign Owner Cynthia Tao

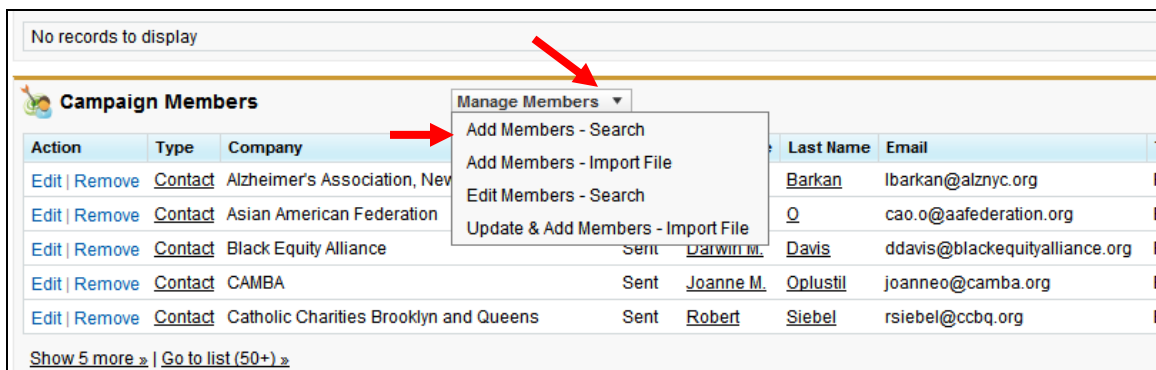
Next, you need to associate members with this campaign. Position the pointer on the **Campaign Members** link, then under **Manage Members** click **Add Members – Search**.



You can also click on the arrow next to the field “Manage Members” on the top of the page and then click on “Add Members –Search”.



Or you can click on the link **Campaign Members** , click on the arrows close to the field **Manage Members** and then click on **Add Members – Search** on the section **Campaign Member** at the bottom of the page.



On the **Add Members** tab, select **Contacts**.

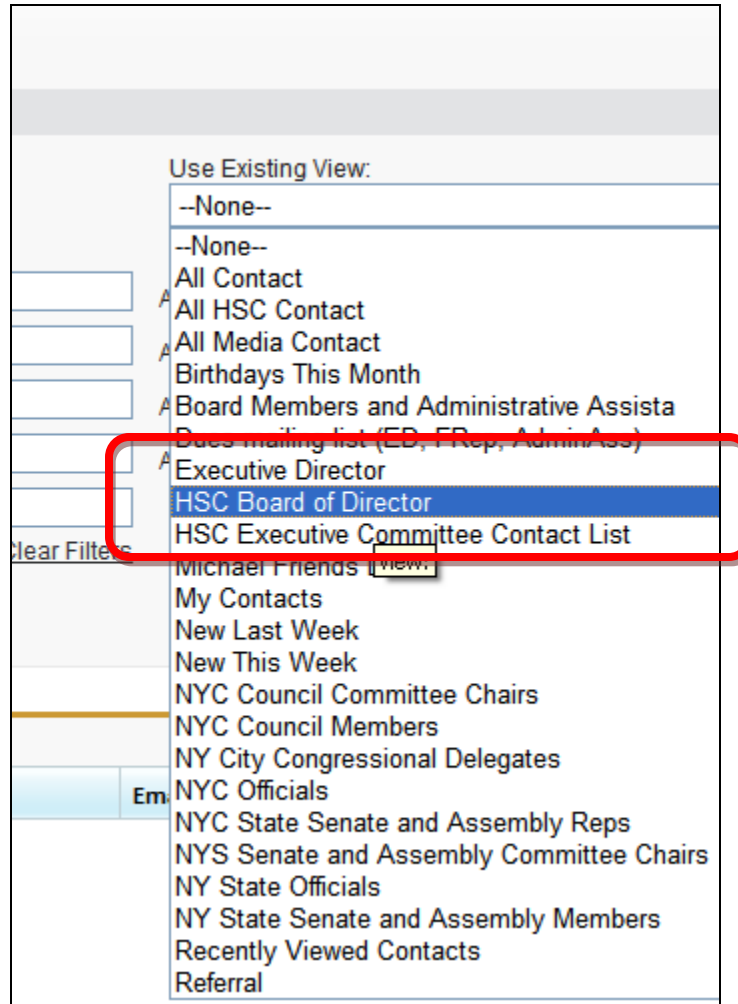
This screenshot shows the 'Add Members' interface. At the top, there are two tabs: 'Add Members' (highlighted with a red box) and 'Existing Members (0)'. Below the tabs is a 'Hide Search' link. The main section is titled 'Step 1: Choose Member Type to Search'. It contains two radio buttons: 'Potential Members' and 'Contacts' (highlighted with a red box). Below this is a section titled 'Step 2: Specify Filter Criteria'.

In the section **Specify Filter Criteria** select **HSC Board of Director** from the **Use Existing View** drop-down list.

This screenshot shows the 'Specify Filter Criteria' section. It includes a table for defining filter criteria and a 'Use Existing View' dropdown menu (highlighted with a red box).

Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Below the table is a 'Clear Filters' link. At the bottom left is a 'Go!' button. The 'Use Existing View' dropdown menu is located at the top right of the filter criteria section and currently shows '--None--'.



Press **Go** at the bottom of the Step 2 box. A list of the Board Members will appear in the bottom part of the screen.

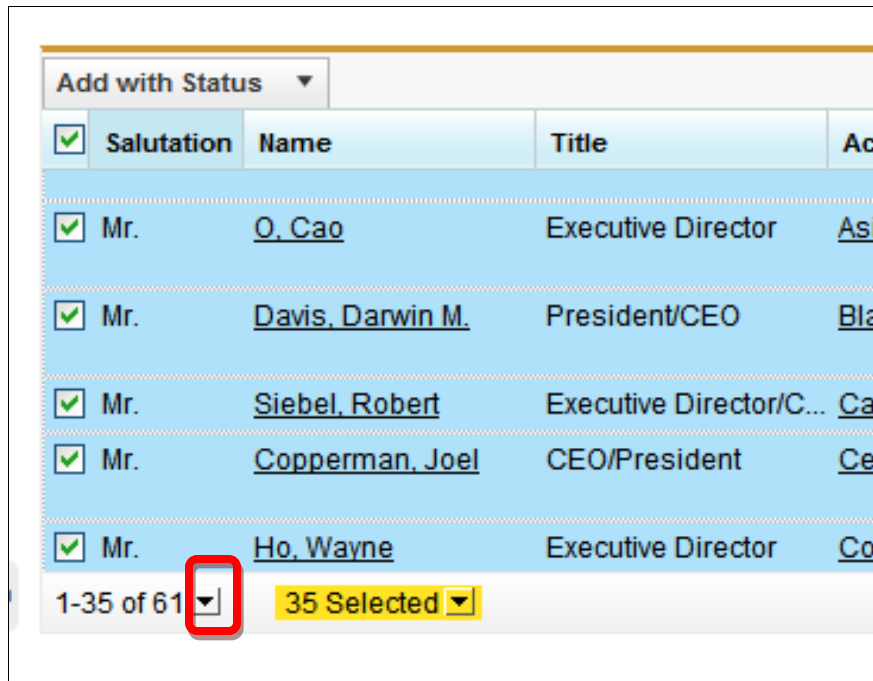
Check the top box (next to **Salutation**, as indicated below) to select all displayed contacts. The number highlighted in yellow at the bottom of the screen shows the number of records selected.

Add with Status ▾				
<input checked="" type="checkbox"/>	Salutation	Name	Title	Acc
<input checked="" type="checkbox"/>	Mr.	<u>Q, Cao</u>	Executive Director	Asi
<input checked="" type="checkbox"/>	Mr.	<u>Davis, Darwin M.</u>	President/CEO	Bl
<input checked="" type="checkbox"/>	Mr.	<u>Siebel, Robert</u>	Executive Director/C...	Ca
<input checked="" type="checkbox"/>	Mr.	<u>Copperman, Joel</u>	CEO/President	Ce
<input checked="" type="checkbox"/>	Mr.	<u>Ho, Wayne</u>	Executive Director	Co
1-35 of 61 ▾		35 Selected ▾		

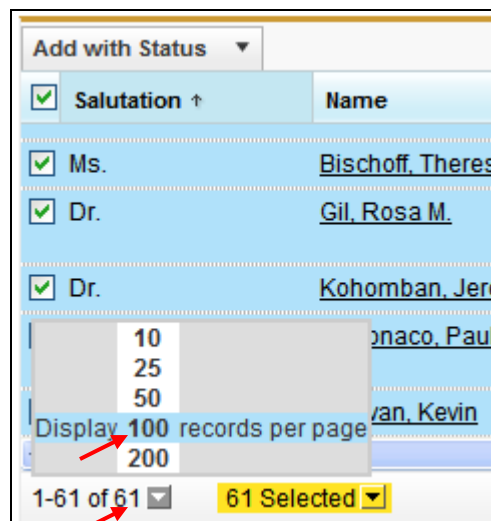
Verify if the number highlighted in yellow at the bottom of the screen is the same of the number after the word “of” at the left corner of the screen (that indicates the total number of record selected by the view).

Add with Status ▾				
<input checked="" type="checkbox"/>	Salutation	Name	Title	Acc
<input checked="" type="checkbox"/>	Mr.	<u>Q, Cao</u>	Executive Director	Asi
<input checked="" type="checkbox"/>	Mr.	<u>Davis, Darwin M.</u>	President/CEO	Bl
<input checked="" type="checkbox"/>	Mr.	<u>Siebel, Robert</u>	Executive Director/C...	Ca
<input checked="" type="checkbox"/>	Mr.	<u>Copperman, Joel</u>	CEO/President	Ce
<input checked="" type="checkbox"/>	Mr.	<u>Ho, Wayne</u>	Executive Director	Co
1-35 of 61 ▾		35 Selected ▾		

If the numbers are not the same click on the arrows close to the first group of number as displayed in the following box



Then select the number that exceeds the total number of records (in the example shown below the total number of records is 61 so the number to be selected is 100).



Then check again the top box (next to **Salutation**, as indicated below) to select all displayed contacts.

You can also add the entire list of Contacts clicking on **Next** (as displayed in the figure below) and checking the box **Salutation** for each page.





Abraham Jones | Search

Search Options...

Potential Members Organizations Donations Reports Households

Campaign

If the function **Search** will not retrieve any result you need to create a new Contact (see section [How to Create or Update an HSC Member Contact](#)).

Click on the **Name** link

Contacts [1]					
Action	Name	Account Name	Phone	Email	Primary Street
<a href="#">Edit</a>	<a href="#">Abraham Jones</a>	Claremont Neighborhood Centers Inc.	(718) 588-1000	<a href="mailto:ajones@claremontcenter.org">ajones@claremontcenter.org</a>	489 East 169th Street

Place the cursor over the **Donations** link and a window will appear; press the button **New Donation**.

Contact  
Abraham Jones

Show Chatter **New!** Follow

« Back to List

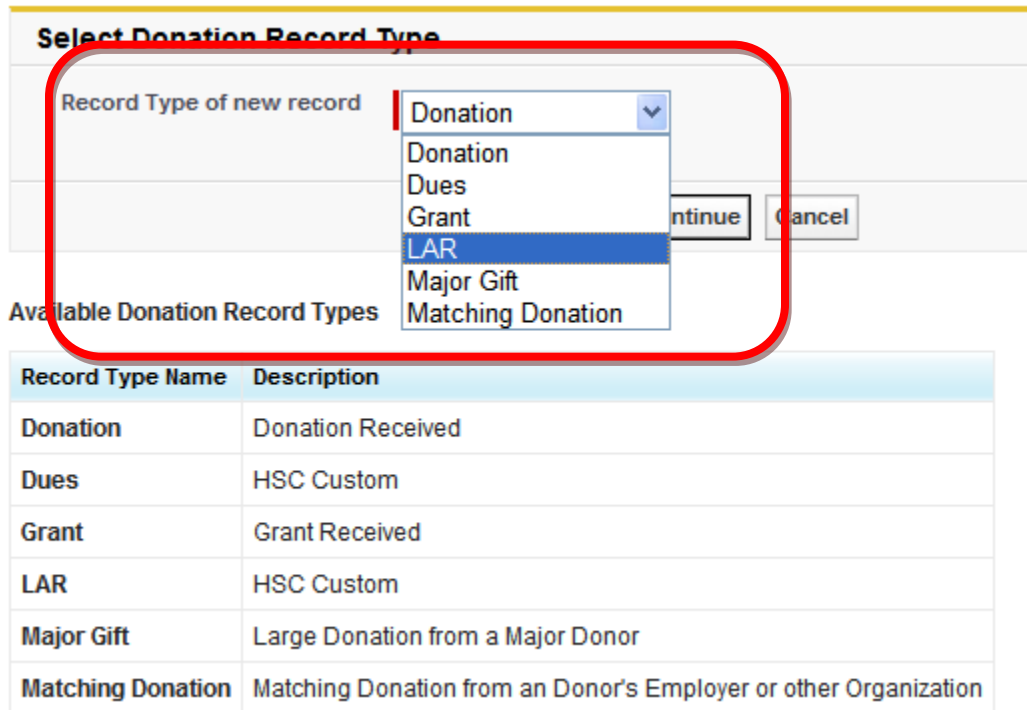
Donations [0] | Activity History [0] | Open Activities [0] | Campaign History [1]

**Donations**

No records to display

Contact Record Type	Default Contact <a href="#">[Change]</a>	Contact Ow
Name	Abraham Jones	Househ
Suffix		Birthd
Title	ED	Fr

Click the down arrowhead in the **Record Type of new record box**. Select LAR from the drop-down list **Record Type of new record**.



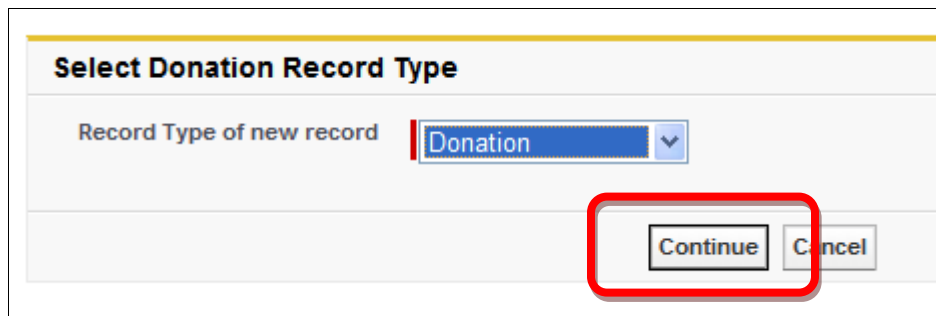
**Select Donation Record Type**

Record Type of new record: Donation ▼

Available Donation Record Types

Record Type Name	Description
Donation	Donation Received
Dues	HSC Custom
Grant	Grant Received
LAR	HSC Custom
Major Gift	Large Donation from a Major Donor
Matching Donation	Matching Donation from an Donor's Employer or other Organization

Press the **Continue** button.



**Select Donation Record Type**

Record Type of new record: Donation ▼

Continue Cancel

Insert the mandatory fields in the Donation Information section:

- **Donation Name:** the identifier for the donation/contribution/purchase.  
Suggestion: type the same name of the Campaign to easily identify that the donation is related to the LAR (e.g. campaign name: LAR 2010; donation name: LAR 2010).

- **Primary Campaign Source** : select the campaign related to the LAR (e.g. LAR 2010).
- **Close Date**: the date of the donation/contribution/purchase. Update the field with the date of last LAR Donation update. In case you received the final check or the donation is placed/received, the field will indicate the actual “close date” of the donation.
- **Stage**:
  - Pledged: if the donation/contribution/purchase has been pledged.
  - Posted: if the donation has been paid.
  - Withdrawn - if the donation/contribution/purchase has been withdrawn.

The field **Account Name** (Contact’s Organization) will be updated automatically by the System if the Donor is a Contact (e.g. HSC Contact Member). If the LAR Donor is an Individual, in the field **Account Name** will be updated his/her Last Name and First Name.

If the Donor is a **Potential Member** the field **Potential Member** will be updated by the System with his/her Last name and First Name.

Complete the LAR section, as appropriate.

- **Journal Package** : select a value from the drop-down list
- **Package Amount**: select the package amount from the drop-down list that corresponds to the Journal Package selected
- **Journal Placement**: select a value from the drop-down list.

- Placement Amount: select the placement amount from the drop-down list that corresponds to the Journal Placement selected
- # Tickets: number of tickets purchased
- Single Tk Amount: change the default value (\$150)
- Contribution: the amount of the additional contribution
- Other: other donation amount
- Ad/Tickets Notes: text note to add details relative to the donation/contribution/purchase
- Discount : percentage of discount applied
- Amount Paid: Total amount paid
- COMP: check this box if the individual was comp'd for the event

Press **Save**.

**Update a LAR donation, contribution, tickets/add purchase**

If you want to update an existing donation/contribution/purchase relative to a LAR campaign, use the Sidebar Search to find an existing contact.

Type the Contact Name and press **Search**

Abraham Jones | Search

Search Options...

Potential Members Organizations Donations Reports Households

Campaign

Click on the **Name** link

Contacts [1]					
Action	Name	Account Name	Phone	Email	Primary Street
<a href="#">Edit</a>	<a href="#">Abraham Jones</a>	Claremont Neighborhood Centers Inc.	(718) 588-1000	<a href="mailto:ajones@claremontcenter.org">ajones@claremontcenter.org</a>	489 East 169th Street

Place your cursor over the **Donations** tab and you'll see a Donations window pop up.

Click on **Edit** next to the name of the Donation that you want to update.

Contact  
Mr. Jack Lund

Show ChatterNew! Following

< Back to List

Donations [1] | Activity History [0] | Open Activities [0] | Campaign History [13] | Notes & Attachments [0] | Referrals

Donations New Donation

Action	Donation Name	Stage
<a href="#">Edit</a>   <a href="#">Del</a>	LAR 2010	Withdrawn

Name Mr. Jack Lund Household

Update the record as needed – you can see a complete description of the fields in the [previous section](#) Create LAR donation, contribution, tickets/advertisement purchas. Click on **Save** when you are finished with your updates.

**Donation Edit**

**Donation Information**

Donation Record Type: LAR

Donation Name: LAR 2010

Description: [Empty]

Account Name: YMCA of Greater New York

Primary Campaign Source: LAR 2010

Potential Member: [Empty]

Close Date: 12/13/2010 [2/10/2011]

Stage: December 2010

Next Step: [Calendar view showing December 13, 2010]

Probability (%): [Empty]

Amount: [Empty]

Notes: [Empty]

**LAR**

Journal Package: --None--

Package Amount: --None--

Journal Placement: --None--

Placement Amount: --None--

Partial Ad: [Empty]

Ads/Tickets (Notes): Silver Package + contribution

Discount (%): [Empty]

Amount Paid: [Empty]

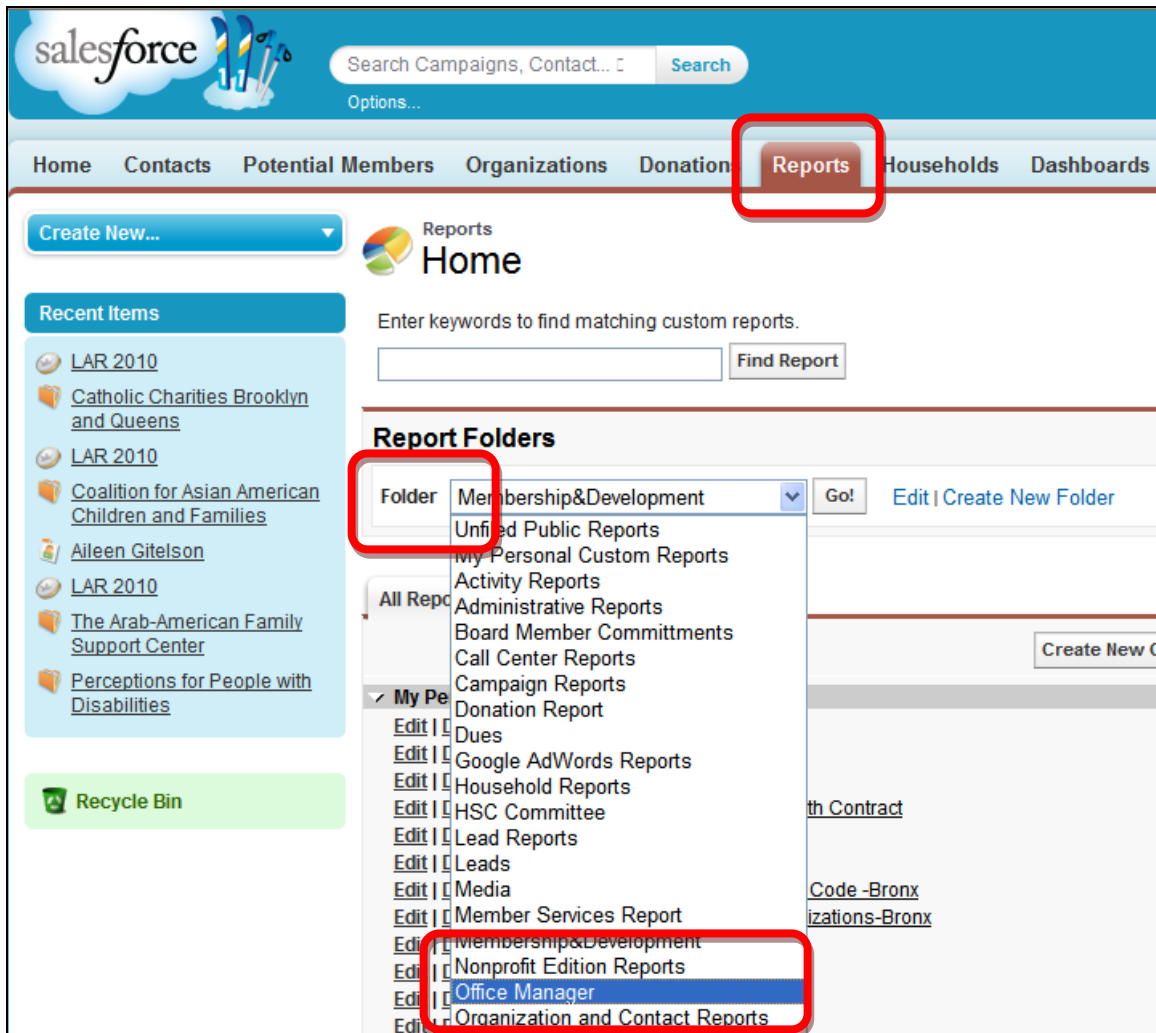
COMP: ☐

## Finding and Running Reports

Several types of reports were created and stored already in the Salesforce database for the Office Manager task.

## Finding Office Manager Reports

To access the reports click on the **Reports** tab. Several reports were created for the **Office Manager** task; to see a list of these reports, click on the down arrow-head in the **Folder** field. You'll see a drop-down list from where you can choose **Office Manager**



You can also find a specific report or a list of reports by typing keywords in the **Find Report** box at the top of the page. For example, if you want to see a report about the Board of Directors, you can type “Board” in to the Find Report box .

**Report Search**

Enter keywords to find matching custom reports.

---

**Reports [10]**

Action	Report Name
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">Board Support</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">#2 Board Members Committee Attendance</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">#6 - November 2010 Board Meeting</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">#3: HSC Board of Directors Contact List</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">#5 LAR 2009</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">#3 No. Board Meetings Attended</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">#12 : Board and Exec. Committee</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">#7: HSC Exec. Board with Organization</a>

You'll see a list of reports that have the word "Board" in the report name or description.

## **Running Office Manager Reports**

There are several custom Salesforce reports that have been created for the Office Manager task, which contain the same information as was maintained in several Excel spreadsheet files. These reports are named the same as the files on HSC's U drive:  
U:\HSC\Administration\HSC Lists )

Note that in the reports, you can click on the column header to sort the entire report by that field. Thus, if you want to see a list by person's name instead of the organization name (called Account Name in the Salesforce reports), you would click on the Last Name column in the report.

## **Folder Office Manager**



▪ **#1: HSC Board of Directors**

This report lists the members of the HSC Board of Directors along with their organization. The checkbox **Executive Committee** indicates if the person is also a member of HSC's Executive Committee.

Account Name	Salutation	First Name	Last Name	Executive Committee
<a href="#">Alzheimer's Association, New York City Chapter</a>	Ms.	<a href="#">Lou-Ellen</a>	<a href="#">Barkan</a>	<input type="checkbox"/>
<a href="#">American Red Cross in Greater New York</a>	Ms.	<a href="#">Theresa</a>	<a href="#">Bischoff</a>	<input type="checkbox"/>
<a href="#">Asian American Federation</a>	Mr.	<a href="#">Cao</a>	<a href="#">O</a>	<input type="checkbox"/>
<a href="#">Black Equity Alliance</a>	Mr.	<a href="#">Darwin M.</a>	<a href="#">Davis</a>	<input type="checkbox"/>
<a href="#">CAMBA</a>	Ms.	<a href="#">Joanne M.</a>	<a href="#">Oplustil</a>	<input checked="" type="checkbox"/>
<a href="#">Catholic Charities Brooklyn and Queens</a>	Mr.	<a href="#">Robert</a>	<a href="#">Siebel</a>	<input checked="" type="checkbox"/>
<a href="#">Catholic Charities of the Archdiocese of New York</a>	Msgr.	<a href="#">Kevin</a>	<a href="#">Sullivan</a>	<input checked="" type="checkbox"/>
<a href="#">Center for Alternative Sentencing and Employment Services</a>	Mr.	<a href="#">Joel</a>	<a href="#">Copperman</a>	<input checked="" type="checkbox"/>

▪ **#2: HSC Board of Directors Addresses**

This lists the members of the HSC Board with the main address of their Organization.

First Name	Last Name	Title	Account Name	Address
<a href="#">Michael H.</a>	<a href="#">Zisser</a>	Executive Director	<a href="#">University Settlement Society of New York City</a>	184 Eldridge Street New York, NY 10002
<a href="#">Frederick</a>	<a href="#">Shack</a>	Executive Director	<a href="#">Urban Pathways</a>	575 8th Avenue 9th Floor New York, NY 10018
<a href="#">Jack</a>	<a href="#">Lund</a>	President/CEO	<a href="#">YMCA of Greater New York</a>	5 West 63rd Street 6th Floor New York, NY 10023
<a href="#">Lou-Ellen</a>	<a href="#">Barkan</a>	President/CEO	<a href="#">Alzheimer's Association, New York City Chapter</a>	360 Lexington Avenue 4th Floor New York, NY 10017

<a href="#">Theresa</a>	<a href="#">Bischoff</a>	CEO	<a href="#">American Red Cross in Greater New York</a>	520 West 49th Street New York, NY 10019
<a href="#">Cao</a>	<a href="#">O</a>	Executive Director	<a href="#">Asian American Federation</a>	120 Wall Street 3rd Floor New York, NY 10005

▪ **#3: HSC Board of Directors Contact List**

This lists the HSC Board Members and their Administrative Assistants, with contact details (e-mail, phone).

Full Name	Board	Title	E-mail	Phone	Direct Phone	Direct Phone Ext.
Account Name: <a href="#">Alzheimer's Association, New York City Chapter</a> (2 records)						
<a href="#">Jackie Zapata</a>	<input type="checkbox"/>	Administrative Assistant	<a href="mailto:jzapata@alznyc.org">jzapata@alznyc.org</a>	(646) 744-2907	(646) 744-2907	-
<a href="#">Lou-Ellen Barkan</a>	<input checked="" type="checkbox"/>	President/CEO	<a href="mailto:lbarkan@alznyc.org">lbarkan@alznyc.org</a>	(646) 744-2901	(646) 744-2901	-
Account Name: <a href="#">Asian American Federation</a> (2 records)						
<a href="#">Lina Kim</a>	<input type="checkbox"/>	Administrative Assistant	<a href="mailto:lina.kim@aafederation.org">lina.kim@aafederation.org</a>	-	-	-
<a href="#">Cao O</a>	<input checked="" type="checkbox"/>	Executive Director	<a href="mailto:cao.o@aafederation.org">cao.o@aafederation.org</a>	(212) 344-5878	(212) 344-5878	-
Account Name: <a href="#">Black Equity Alliance</a> (2 records)						
<a href="#">Norley Nortey</a>	<input type="checkbox"/>	Administrative Assistant	<a href="mailto:nnortey@blackequityalliance.org">nnortey@blackequityalliance.org</a>	(212) 251-2420	-	-
<a href="#">Darwin M. Davis</a>	<input checked="" type="checkbox"/>	President/CEO	<a href="mailto:ddavis@blackequityalliance.org">ddavis@blackequityalliance.org</a>	(212) 251-2420	(212) 251-2480	-

▪ **#4: HSC Executive Committee Addresses**

This report lists the HSC Executive Committee members with the main address of their Organization.

First Name	Last Name	Title	Account Name	Address
<a href="#">Nancy</a>	<a href="#">Wackstein</a>	Executive Director	<a href="#">United Neighborhood Houses of New York</a>	70 West 36th Street 5th Floor New York, NY 10018
<a href="#">Frederick</a>	<a href="#">Shack</a>	Executive Director	<a href="#">Urban Pathways</a>	575 8th Avenue 9th Floor New York, NY 10018
<a href="#">Joanne M.</a>	<a href="#">Oplustil</a>	ED	<a href="#">CAMBA</a>	1720 Church Avenue

▪ **#5 HSC Executive Committee Contact List**

This report lists the HSC Executive Committee and their Administrative Assistants, with contact details (e-mail, phone).

Executive Committee	Full Name	Title	E-mail	Phone	Direct Phone	Direct Phone Ext.
Account Name: <a href="#">CAMBA</a> (2 records)						
<input type="checkbox"/>	<a href="#">Lorelie Lombardo</a>	Administrative Assistant	<a href="mailto:loreliel@camba.org">loreliel@camba.org</a>	(718) 287-2600	(718) 287-2600	x 228
<input checked="" type="checkbox"/>	<a href="#">Joanne M. Oplustil</a>	ED	<a href="mailto:joanneo@camba.org">joanneo@camba.org</a>	(718) 287-2600	(718) 287-2600	ext. 228
Account Name: <a href="#">Catholic Charities Brooklyn and Queens</a> (2 records)						

<input type="checkbox"/>	<a href="#">Hunte</a> <a href="#">LaFerne</a>	Administrative Assistant	<a href="mailto:lhunte@ccbq.org">lhunte@ccbq.org</a>	-	-	-
<input checked="" type="checkbox"/>	<a href="#">Robert</a> <a href="#">Siebel</a>	Executive Director/CEO	<a href="mailto:rsiebel@ccbq.org">rsiebel@ccbq.org</a>	(718) 722-6085	(718) 722-6085	-

▪ **#6: HSC Executive Committee with Organization**

List of EDs of HSC Member Organization

First Name	Last Name	Title	Account Name
<a href="#">Nancy</a>	<a href="#">Wackstein</a>	Executive Director	<a href="#">United Neighborhood Houses of New York</a>
<a href="#">Frederick</a>	<a href="#">Shack</a>	Executive Director	<a href="#">Urban Pathways</a>
<a href="#">Joanne M.</a>	<a href="#">Oplustil</a>	ED	<a href="#">CAMBA</a>

▪ **#9 - List Of HSC Member Organization**

A list of all HSC member organizations, without any additional details.

Account Name
<a href="#">Child Care, Inc.</a>
<a href="#">Mental Health Association of New York City</a>
<a href="#">United Way of New York City</a>
<a href="#">Jamaica Service Program for Older Adults</a>
<a href="#">YWCA of Queens</a>
<a href="#">Bronx House</a>

▪ **#10: Full Member with EDs**

List of HSC member organizations with ED names only.

Account Name	Salutation	First Name	Last Name
<a href="#">United Neighborhood Houses of New York</a>	Ms.	<a href="#">Nancy</a>	<a href="#">Wackstein</a>
<a href="#">University Settlement Society of New York City</a>	Mr.	<a href="#">Michael H.</a>	<a href="#">Zisser</a>
<a href="#">Urban Pathways</a>	Mr.	<a href="#">Frederick</a>	<a href="#">Shack</a>
<a href="#">Varied Internship Program</a>	Ms.	<a href="#">Nettie</a>	<a href="#">Burgess</a>

▪ **#11: Full Membership with ED's email**

List of HSC member organizations with their ED's name and email address.

Account Name	Salutation	First Name	Last Name	E-mail
<a href="#">Agenda for Children Tomorrow</a>	Ms.	<a href="#">Linda</a>	<a href="#">Selvin</a>	<a href="mailto:linda.selvin@dfa.state.ny.us">linda.selvin@dfa.state.ny.us</a>
<a href="#">Aging in America Community Service</a>	Ms.	<a href="#">Judith</a>	<a href="#">Richburg</a>	<a href="mailto:jrichburg@aiaamsh.org">jrichburg@aiaamsh.org</a>
<a href="#">Alzheimer's Association, New York City Chapter</a>	Ms.	<a href="#">Lou-Ellen</a>	<a href="#">Barkan</a>	<a href="mailto:lbarkan@alzny.org">lbarkan@alzny.org</a>
<a href="#">American Group Psychotherapy Association</a>	Ms.	<a href="#">Marsha</a>	<a href="#">Block</a>	<a href="mailto:mblock@agpa.org">mblock@agpa.org</a>

▪ **#12 : Board and Exec. Committee**

List of HSC's Board of Directors, including the Executive Committee, with full contact details (address, e-mail, phone, fax) and Board position. The checkbox **Executive Committee** indicates if the person is also a member of HSC's Executive Committee.

Note: To fit the Word page format, the screen below does not represent the format of the database report. The fields for each agency run horizontally in the report, rather than vertically as shown here

<a href="#">Account Name</a>	<a href="#">Alzheimer's Association, New</a>	<a href="#">Asian American Federation</a>
------------------------------	--	---

	<a href="#">York City Chapter</a>	
<a href="#">Acronym</a>	-	-
<a href="#">Salutation</a>	Ms.	Mr.
<a href="#">First Name</a>	<a href="#">Lou-Ellen</a>	<a href="#">Cao</a>
<a href="#">Last Name</a>	<a href="#">Barkan</a>	<a href="#">O</a>
<a href="#">Nickname</a>	-	-
<a href="#">Title</a>	President/CEO	Executive Director
<a href="#">Board</a>		
<a href="#">Executive Committee</a>		
<a href="#">E-mail</a>	<a href="mailto:lbarkan@alznyc.org">lbarkan@alznyc.org</a>	<a href="mailto:cao.o@aafederation.org">cao.o@aafederation.org</a>
<a href="#">Phone</a>	(646) 744-2901	(212) 344-5878
<a href="#">Direct Phone</a>	(646) 744-2901	(212) 344-5878
<a href="#">Direct Phone Ext.</a>	-	-
<a href="#">Address</a>	360 Lexington Avenue 4th Floor New York, NY 10017	120 Wall Street 3rd Floor New York, NY 10005
<a href="#">Fax</a>	(646) 744-2901	(212) 344-5878
<a href="#">Board</a>	Elected	Standing
<a href="#">Officer Title</a>	-	-

▪ **#13 : Master Member List with All Contact Detail**

List of all HSC member organizations with contact details about the ED and organization location.

Note: To fit the Word page format, the screen below does not represent the format of the database report. The fields for each agency run horizontally in the report, rather than vertically as shown here

<a href="#">Account Name</a>	<a href="#">YWCA of the City of New York</a>	<a href="#">You Gotta Believe!</a>	<a href="#">YMCA of Greater New York</a>
<a href="#">Salutation</a>	Ms.	Mr.	Mr.

<a href="#">First Name</a>	<a href="#">Anne</a>		<a href="#">Patrick</a>	<a href="#">Jack</a>	
<a href="#">Last Name</a>	<a href="#">Winters-Bishop</a>		<a href="#">O'Brien</a>	<a href="#">Lund</a>	
<a href="#">Title</a>	President/CEO		Executive Director	President/CEO	
<a href="#">Primary Street</a>	50 Broadway @ Exchange Place	13th Floor	1728 Mermaid Ave.	5 West 63rd Street	6th Floor
<a href="#">Primary City</a>	New York		Brooklyn	New York	
<a href="#">Primary State/Province</a>	NY		NY	NY	
<a href="#">Primary Zip/Postal Code</a>	10004		11224	10023	
<a href="#">Direct Phone</a>	(212) 755-4500		(718) 372-3003	(212) 630-9600	
<a href="#">Direct Phone Ext.</a>	-		-	-	
<a href="#">Phone</a>	-		(718) 372-3003	(212) 630-9600	
<a href="#">Mobile Phone</a>	-		-	-	
<a href="#">Fax</a>	(212) 735-9705		(718) 372-3033	(212) 630-9604	
<a href="#">Email</a>	<a href="mailto:awinters-bishop@ywcany.org">awinters-bishop@ywcany.org</a>		<a href="mailto:ygbpat@msn.com">ygbpat@msn.com</a>	<a href="mailto:jlund@ymcany.org">jlund@ymcany.org</a>	

## Running LAR Reports

### **Folder LAR**

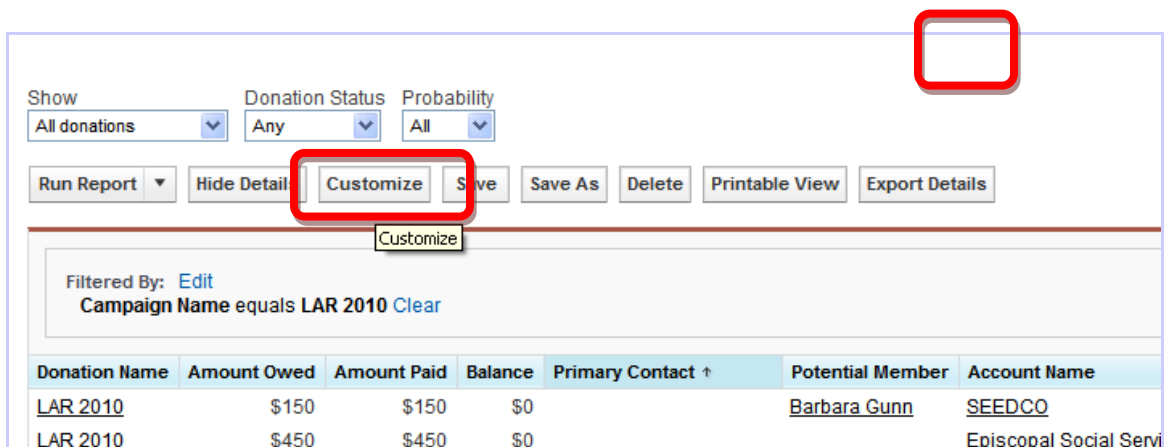
#### ▪ **#14 LAR 2010**

List of all people/organizations that pledged a donation to the LAR. The amounts that are pledged (amount owed) and received (amount paid) are indicated, along with the totals for each.

Donation Name	Amount Owed	Amount Paid	Balance	Primary Contact	Potential Member	Account Name
<a href="#">LAR 2010</a>	\$150	\$150	\$0		<a href="#">Barbara Gunn</a>	<a href="#">SEEDCO</a>
<a href="#">LAR 2010</a>	\$300	\$300	\$0	<a href="#">Aileen Gitelson</a>		<a href="#">Jewish Association for Services for the Aged</a>
<a href="#">LAR 2010</a>	\$100	\$100	\$0	<a href="#">Alan B. Siskind</a>		<a href="#">Alan B. Siskind</a>
<a href="#">LAR 2010</a>	\$500	\$500	\$0	<a href="#">Alan Belzer</a>		<a href="#">Alan Belzer</a>
<a href="#">LAR 2010</a>	\$450	-	\$450	<a href="#">Alan D. Goodman</a>		<a href="#">Brooklyn Community Services</a>
.....	.....	.....	.....	.....	.....	.....
<a href="#">LAR 2010</a>	\$300	-	\$300	<a href="#">William Rapfogel</a>		<a href="#">Metropolitan Council on Jewish Poverty</a>
<b>Grand Totals (139 records)</b>						
<div> <div>\$94,318</div> <div>\$70,018</div> </div>						

You might want to create report for LAR in different period.

To create a new LAR report click on the button **Customize** on the top of the report.



Show:  Donation Status:  Probability:

Filtered By: [Edit](#)  
 Campaign Name equals LAR 2010 [Clear](#)

Donation Name	Amount Owed	Amount Paid	Balance	Primary Contact ↑	Potential Member	Account Name
<a href="#">LAR 2010</a>	\$150	\$150	\$0		<a href="#">Barbara Gunn</a>	<a href="#">SEEDCO</a>
<a href="#">LAR 2010</a>	\$450	\$450	\$0			<a href="#">Episcopal Social Servi</a>

Click on the link **Edit** close to the filter **Campaign Name**. The link will appear if you position the cursor on the field Campaign name.



**Filters** Add ▼

Show All donations ▼ Donation Status Any ▼

Date Field Start Date ▼ Range All Time ▼ From

Campaign Name equals "LAR 2010" Edit Remove

---

**Preview** Tabular Format ▼ Show ▼ Remove All Columns

Donation Name	Amount Owed	Amount Paid	Balance
LAR 2010	\$300	\$300	
LAR 2010	\$150	\$150	

Update the name of the LAR campaign (e.g. LAR 2011). Then press **OK**.

**Filters** Add ▼

Show All donations ▼ Donation Status Any ▼ Probability All ▼

Date Field Start Date ▼ Range All Time ▼ From  To

Campaign Name  equals  LAR 2010 OK Cancel

Press the button **Save As** to save the report.

**salesforce** Search Campaigns, Contact... Search

Options...

Report Type: Campaigns with Donations

#14 LAR 2010

Save Save As Close Report Properties Run Report

**Fields** All ⌵ # ⌵

Quick Find

Drag and drop to add fields to the report.

Campaign: General

- ⌵ Campaign Name
- ⌵ Campaign ID

**Filters** Add ▼

Show All donations ▼ Donation Status Any ▼ Probability All ▼

Date Field Start Date ▼ Range All Time ▼ From  To

Campaign Name  equals  LAR 2010 OK Cancel

Insert a **Report Name** (the field Report Unique Name will be updated by the System).  
 Select **Members Reports** in the field **Report Folder**.

**Save Report As** [Help for this Page](#) ? x

Report Name

Report Unique Name  [i](#)

Report Description

Report Folder **My Personal Custom Reports** ▼

Save Hierarchy Level **My Personal Custom Reports** ▲

- My Personal Custom Reports
- Unfiled Public Reports
- Board Member Commitments
- Dashboard
- Development Status
- Google AdWords Reports
- HSC Committee
- Household Reports
- Lists
- Media
- Members Reports

\$400	\$400
\$650	\$650
\$950	\$950
\$50	\$50
\$150	\$150

Press the button **Save and Run Report**

**Save Report As** [Help for this Page](#) ? x

Report Name

Report Unique Name  [i](#)

Report Description

Report Folder **Members Reports** ▼

Save Hierarchy Level ☐ [i](#)

The procedure to import LAR excel file into Salesforce.com Database is described on  
*Cap Import Excel HSC file into Salesforce.com Database; Par Import/Update LAR*

▪ **#1 Michael's Friends List**

Michel's Friend Contact List.

Note: the table has been transposed to fit the page format.

<a href="#">Salutation</a>	Ms.	Ms.	Mr.	Ms.
<a href="#">First Name</a>	<a href="#">Patricia</a>	<a href="#">Tracie</a>	<a href="#">Gary</a>	<a href="#">Sandra</a>
<a href="#">Last Name</a>	<a href="#">White</a>	<a href="#">Abbott</a>	<a href="#">Axelbank</a>	<a href="#">Bernabei</a>
<a href="#">Title</a>	Senior Program Officer	Executive Director	-	Community Organizer
<a href="#">Account Name</a>	<a href="#">New York Community Trust</a>	<a href="#">NYC Business Solutions</a>	<a href="#">Monroe College</a>	<a href="#">Antiracist Alliance</a>
<a href="#">Primary Street</a>	2 Park Avenue	24th Floor 110 William Street	7th Floor 2501 Jerome Avenue	14 Harwood Court Suite 428
<a href="#">Primary City</a>	New York	New York	Bronx	Scarsdale
<a href="#">Primary State/Province</a>	NY	NY	NY	NY
<a href="#">Primary Zip/Postal Code</a>	10016	10038	11046	10583
<a href="#">Phone</a>	(212) 686-0010	-	-	-
<a href="#">Mobile Phone</a>	-	-	-	-
<a href="#">Fax</a>	(212) 532-8528	-	-	-
<a href="#">E-mail</a>	<a href="mailto:paw@nyct-cfi.org">paw@nyct-cfi.org</a>	-	-	<a href="mailto:sandy.bernabei@gmail.com">sandy.bernabei@gmail.com</a>

▪ **#2 Past Honorees List**

List of HSC Past Honorees.

Note: the table has been transposed to fit the page format.

<a href="#">Salutation</a>	Mr.	Mr.	Dr.
<a href="#">First Name</a>	<a href="#">Phillip</a>	<a href="#">Steven</a>	<a href="#">Rosa M.</a>
<a href="#">Last Name</a>	<a href="#">Coltoff</a>	<a href="#">Newman</a>	<a href="#">Gil</a>
<a href="#">Title</a>	-	Designated Rep	President/CEO
<a href="#">Account Name</a>	<a href="#">Children's Aid Society</a>	<a href="#">Public Health Solutions</a>	<a href="#">Comunilife, Inc.</a>
<a href="#">Primary Street</a>	105 East 22nd Street	220 Church Street 5th Floor	214 West 8th Floor 29th Street
<a href="#">Primary City</a>	New York	New York	New York
<a href="#">Primary State/Province</a>	NY	NY	NY
<a href="#">Primary Zip/Postal Code</a>	10010	10013	10001
<a href="#">Phone</a>	-	-	(212) 219-1618
<a href="#">Mobile Phone</a>	-	-	-
<a href="#">Fax</a>	(212) 460-5941	(646) 619-6777	(212) 219-1618 ext. 6141
<a href="#">E-mail</a>	<a href="mailto:pcoltoff@childrensaidsociety.org">pcoltoff@childrensaidsociety.org</a>	<a href="mailto:snewman@mhra.org">snewman@mhra.org</a>	<a href="mailto:rgil@comunilife.org">rgil@comunilife.org</a>

## Membership and Development Profile

### ***Login Information:***

**Username:** worde@humanservicescouncil.org

**Password:** HSCIntern1

There are many tasks that you may need to perform, which are also performed by the Office Manager role. These tasks are documented already in the first half of this *User's Guide*. You can follow the links below to find out how to perform these tasks.

- *Error! Reference source not found.*
- *Error! Reference source not found.*
- **Error! Reference source not found.**
- **Error! Reference source not found.**
- **Error! Reference source not found.**
- **Error! Reference source not found.**

Step 1 of 3: Upload the File

Campaign Update Wizard

Next >

With salesforce.com, you can associate Leads or Contacts with a particular campaign.

1. Create a Contact report or Lead report of the records you want to update.
2. Include the following fields in the report: Contact ID or Lead ID
3. Export the report to Excel as a CSV file, and then open it in Excel.
4. If the Contact ID or the Lead ID have different member statuses, add a Member Status column to the file.
5. Populate the Member Status column with one of the standard statuses. Any invalid or blank statuses will be replaced with the default status specified below.
6. Choose the file to **import** into **salesforce.com**:  
**Note:** it may take a few minutes to upload your file, depending on the file size and your connection speed
7. Assign all records to this campaign: Ex. Committee and Admin. Ass.email
8. Use this default member status:
9. The selection below is set to a default value. Override this default value only if your import file has a different character encoding.
10. ☐ Trigger workflow rules for new and updated records

Next >

Select **Contact ID** in the field **Record ID** as shown in the following box. Then press **Next**.

In the list below, select the field in your import file that contains the record IDs and member statuses. Once you have finished, click **Next**:

### Campaign Member Information

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Record Id:	-- none selected --	Status:	-- none selected --
<div style="border: 1px solid #ccc; padding: 2px;"> -- none selected --  First Name (col 0)  Last Name (col 1)  Executive Director/CEO (col 2)  <b>Contact ID (col 3)</b>  Title (col 4)  Account ID (col 5)  Board (col 6)  Account Name (col 7)  -- none selected -- </div>			
Custom Fields			
Attended:	-- none selected --	Notes:	-- none selected --
Required Form	-- none selected --	Confirmed:	-- none selected --
Returned:	-- none selected --	id:	-- none selected --
Lead:	-- none selected --	Add Received:	-- none selected --
#:	-- none selected --	Member:	-- none selected --
Registration Date:	-- none selected --	Source:	-- none selected --
HSCMember:	Not Accessible	Second Invoiced Date:	-- none selected --
First Invoiced Date:	-- none selected --	COMP:	-- none selected --
Third Invoiced Date:	-- none selected --	Referred by (Text):	-- none selected --
Hidden_Referred_by_id:	Not Accessible		
Hidden_Returned_Form:	Not Accessible		

Click on the button **Import Now**.

Step 3 of 3: Review and Confirm ...
Campaign Update Wizard

Status: No column for the Status is specified

**WARNING:** If you continue with this import, the Status of all imported records will be set to the default value on the previous page. If this is not acceptable, please click the Back button to map the Status field.

Press **Import Now!** to submit this import request to salesforce.com.

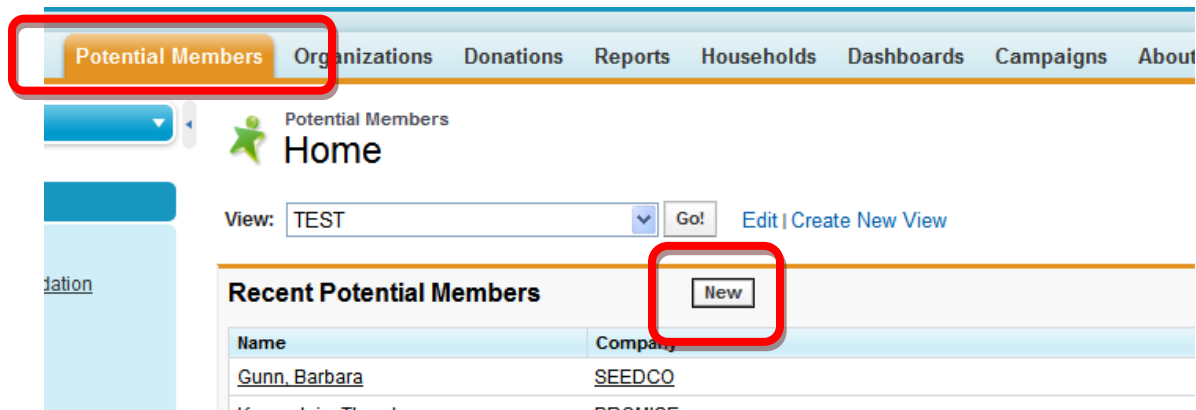
Repeat the same step for the list **HSC Board and Admin. Ass. E-mail Campaigns Members** ( Note: The report name for this list under the folder SF System Admin is truncated to **HSC Board and Admin. Ass. E-mail Campaig** as the System doesn't allow long text for Report Name).

- Tracking Board Member Commitments
- Tracking Leadership Awards Reception (LAR) Pledges
- Finding and Running Reports

## *Working with Potential Members*

### **1. Create a New Potential Member**

Click on the **Potential Members** tab to work with potential members. Click the **New** button to create a new entry.



You will have to enter data for the mandatory fields, **Last Name** and **Company**.

Potential Members Organizations Donations Reports Households Dashboards Campaigns About Nonprofit Starter Package

Lead Edit  
New Potential Member

Potential Member Edit Save Save & New Cancel

Lead Information

First Name --None--  
Last Name  
Suffix  
Company  
Acronym  
Title  
Campaign  
Status OPEN

Phone  
Direct Phone  
Direct Phone Ext  
Mobile  
Fax  
Email  
Alternative Email  
Website

The **Status** field is already set to **OPEN**.

Title  
Campaign  
Status OPEN  
Joined on --None--  
Referred Potential JOINED  
Agency Rep NOT JOINING

For new potential member, the **Lead Status** will either be **Open – Not Contacted** or **Working – Contacted** if you have already reached out to them. (**Lead Status** is also a mandatory field, but it is prefilled with a value, **Open – Not Contacted** so you can leave the field as-is if appropriate.)



Executive Director

To Do

Notes

Lead Status

Open - Not Contacted

Open - Not Contacted

Working - Contacted

Closed - Converted

Closed - Not Converted

Address Information

Street

When you are finished making updates to the fields for which you have data, press **Save**.

Potential Member Edit

Save Save & New Cancel

Lead Information

First Name --None--

Last Name

Suffix

Company

Acronym

Phone

Direct Phone

Direct Phone Ext

Mobile

Fax

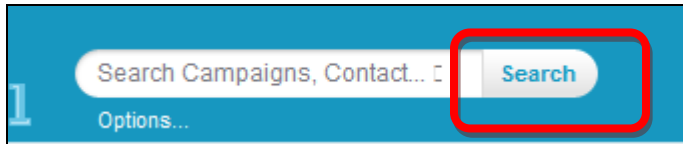
For Field details and descriptions see cap **Error! Reference source not found.**

par.Potential Members Field

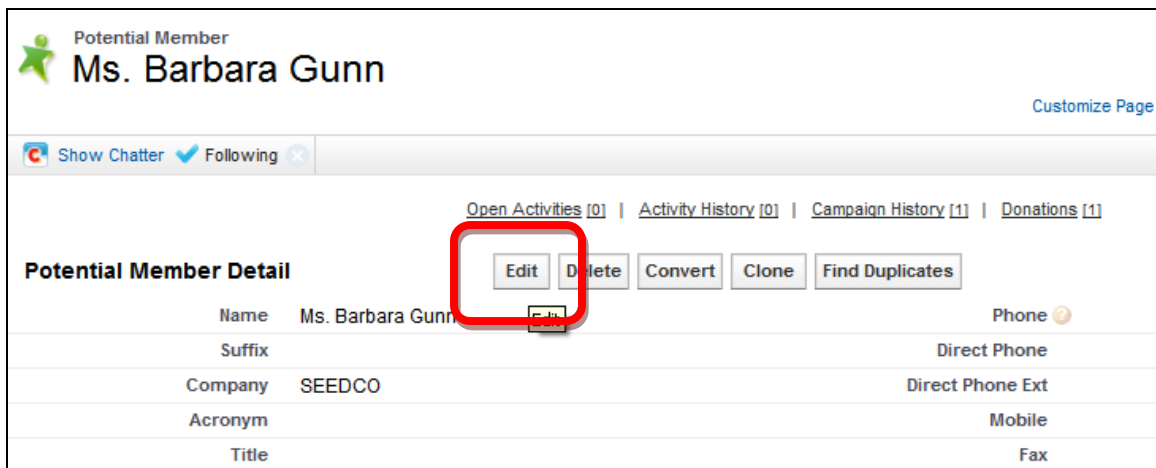
## 2. Update an Existing Potential Member

Find the Potential Member using the **Search** bar at the top of the **Salesforce** screen. Type in the name or a few characters of the name and you will see a list of possible matches.

Click on the match or type the full name and click on **Search**.



In the Potential Member record, click **Edit**. Fill in the fields that you want to update and press **Save** when you are finished.



### 3. Convert a Potential Member into a Contact

When a potential member pays dues and becomes a regular HSC member, you can convert their entry in the database from being a potential member to being a contact who is a member.

First, you can find the potential member record in the database by searching for the name as you did in the section above, Update an Existing Potential Member. After you have found the record, you can convert a **Potential Member** into a **Contact** by clicking the **Convert** button.

Potential Member  
**Ms. Barbara Gunn**

[Customize Page](#) | [Edit Layout](#)

Show Chatter Following

[Open Activities \[0\]](#) | 
 [Activity History \[0\]](#) | 
 [Campaign History \[1\]](#) | 
 [Donations \[1\]](#)

**Potential Member Detail**

[Edit](#)
[Delete](#)
[Convert](#)
[Clone](#)
[Find Duplicates](#)

Name	Ms. Barbara Gunn	Phone	
Suffix		Direct Phone	
Company	SEEDCO	Direct Phone Ext	
Acronym		Mobile	
Title		Fax	
Status	OPEN	Email	bdgunn@seedco.o
Joined on		Alternative Email	

Do not check **Do not create a new donation upon conversion.**

Convert Potential Member  
**Barbara Gunn**

Potential Members can be converted to organizations, contacts, donations, and followup tasks.  
You should only convert a potential member once you have identified it as qualified.  
After this potential member has been converted, it can no longer be viewed or edited as a potential member, but can be viewed in lead reports.

[Convert](#)
[Cancel](#)

**Convert Potential Member**

Record Owner

Send Email to the Owner ☐

Account Name  [View](#)

Donation Name

☐ Do not create a new donation upon conversion.

Converted Status

**Task Information**

Subject

Due Date

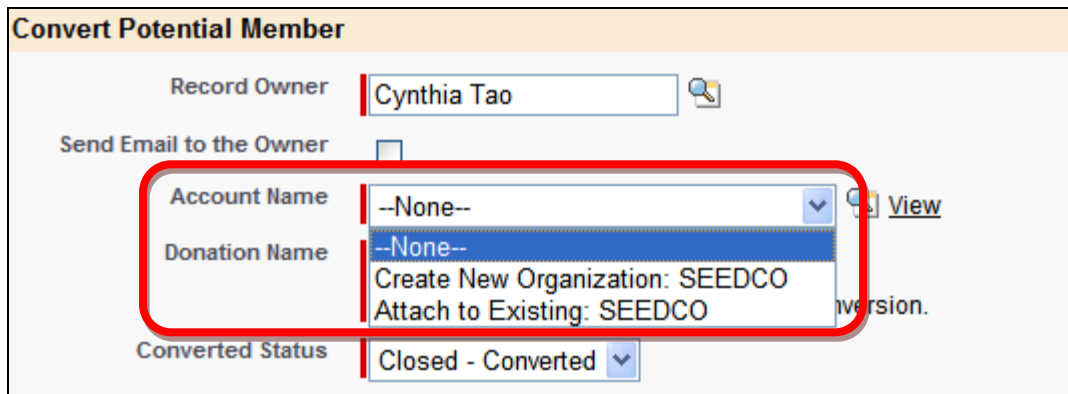
Priority

Status

**Description Information**

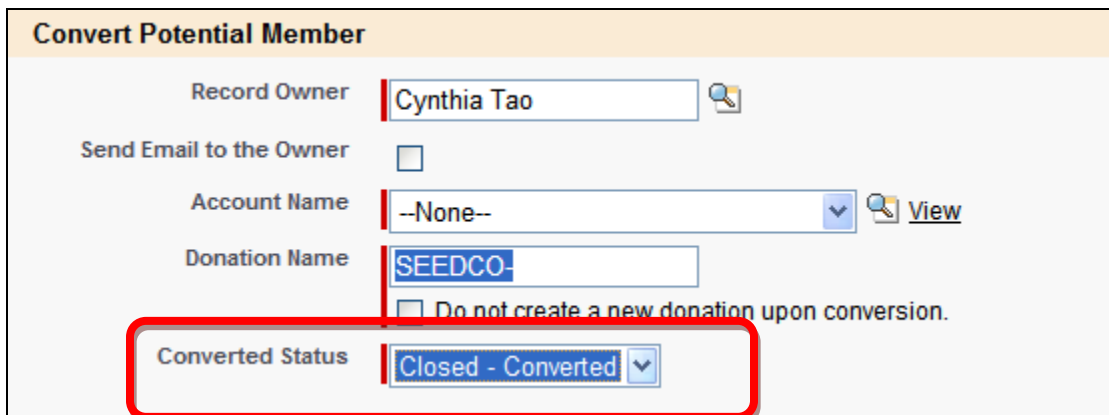
Comments

Choose **Create New Organization** or **Attach to Existing Organization** (if the Organization is already in the database) in the **Account Name** field.



The screenshot shows the 'Convert Potential Member' form. The 'Record Owner' field is 'Cynthia Tao'. The 'Send Email to the Owner' checkbox is unchecked. The 'Account Name' dropdown menu is open, showing options: '--None--', 'Create New Organization: SEEDCO', and 'Attach to Existing: SEEDCO'. The 'Donation Name' field is empty. The 'Converted Status' dropdown menu is set to 'Closed - Converted'. A red box highlights the 'Account Name' dropdown menu.

Set the **Converted Status** field to **Closed – Converted**.



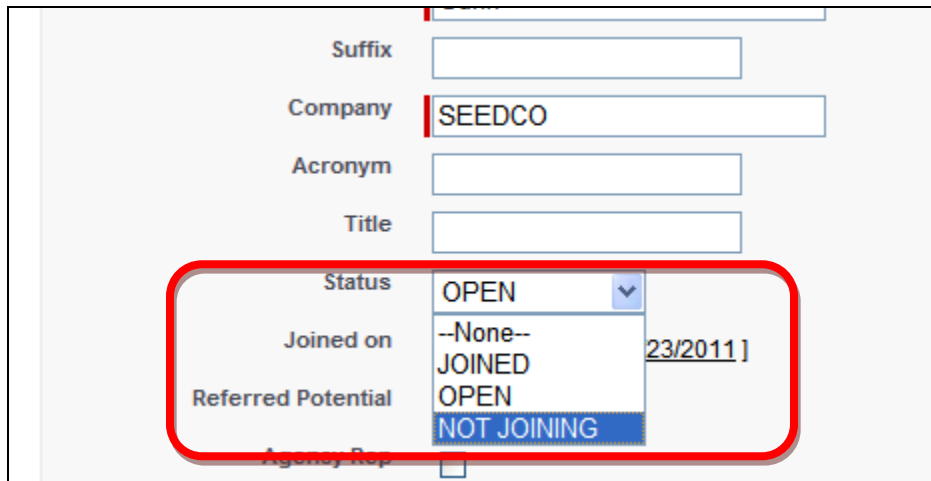
The screenshot shows the 'Convert Potential Member' form. The 'Record Owner' field is 'Cynthia Tao'. The 'Send Email to the Owner' checkbox is unchecked. The 'Account Name' dropdown menu is set to '--None--'. The 'Donation Name' field is 'SEEDCO'. The 'Converted Status' dropdown menu is set to 'Closed - Converted'. A red box highlights the 'Converted Status' dropdown menu.

You can add further descriptions about the potential member or notes about them joining HSC – or task information if HSC indicated it would perform follow up work for them – in the record. When you have entered all information, press **Convert**.

#### 4. Indicate a Potential Member Will Not Be Joining

If a Potential Member decides not to join HSC, you can update the database record to indicate this. To begin, you can search for the Potential Member as documented in the previous sections.

Set **Status** to **NOT JOINING** and **Lead Status** to **Closed-Not Converted**



Suffix

Company SEEDCO

Acronym

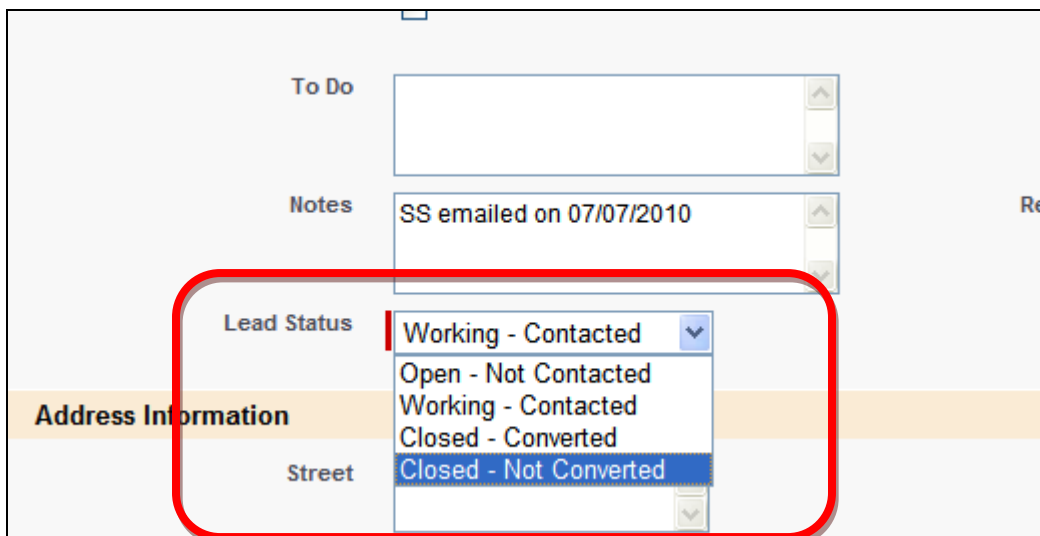
Title

Status OPEN

Joined on --None-- 23/2011]

Referred Potential OPEN

Agency Rep



To Do

Notes SS emailed on 07/07/2010

Address Information

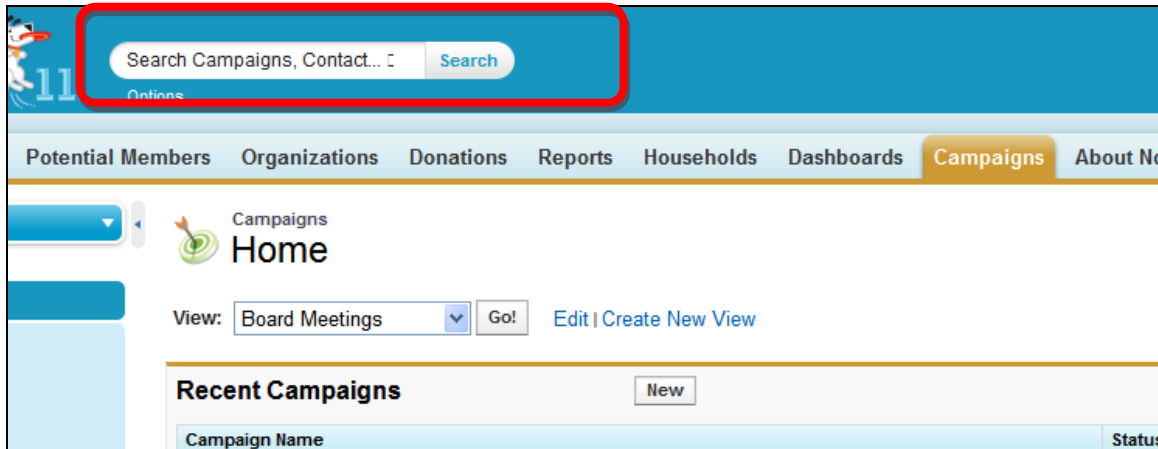
Lead Status Working - Contacted

Street

Press **Save**.

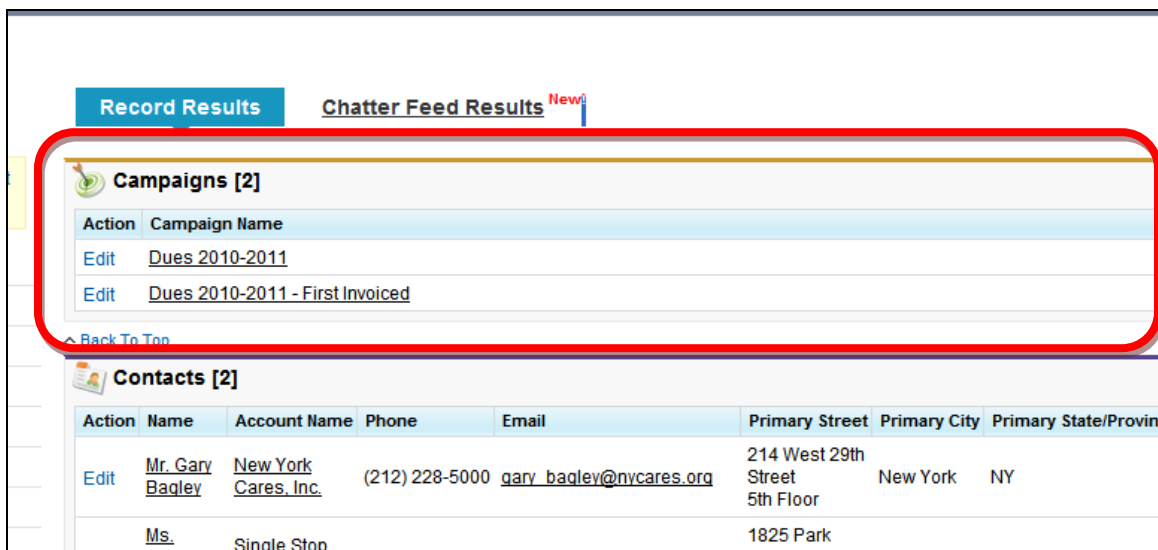
## Tracking Membership Dues

Membership dues are being recorded in the database as Salesforce campaigns. To find the dues campaigns that have already been entered into the database, you can type “dues” in the bar at the top of the screen and click on **Search**.



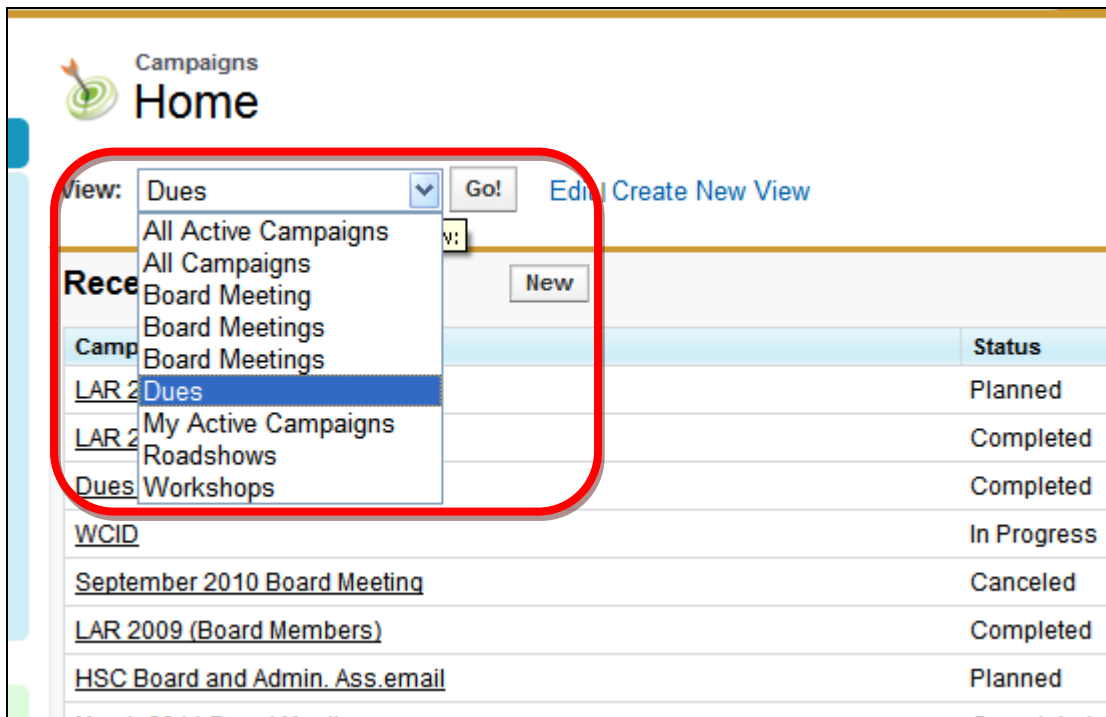
The Search will return all the Objects that contain the word “Dues” (for example the list of Contact that have the word “dues” in the *Note* field.

You’ll see a list of dues campaigns under the section **Campaign** at the top of the page.



You can also click on the **Campaigns** tab to see a list of all active campaigns, which will include dues invoicing as well as other items that HSC is tracking in the database through campaigns.

To see the list of Dues invoicing click on the arrow on the field **View** and select the voice **Dues**.



## 5. Create a New Dues Campaign

If you are about to launch a new round of invoicing members for their dues, you will want to create a new dues campaign in the database to track this activity. To create a new Dues Campaign, click the **Campaigns** tab, then the **New** button.



**Campaign Name** is a required field. Suggestion: To easily identify the Dues Campaign, use the title **Dues [Start Membership Date- End Membership Date]** (e.g Dues 2010-2011).

Select **Dues** under the drop-down list **Type**.



**Campaign Information**

Campaign Owner: Cynthia Tao

Campaign Name:

Description:

Active: ☐

Type:

Status:

Start Date:

End Date:

**Campaign Detail**

Expected Revenue:

Budgeted Cost:

Actual Cost:

Expected Response (%):

**Dropdown Menu:**

- None--
- Conference
- Webinar
- Public Relations
- Partners
- Referral Program
- Advertisement
- Direct Mail
- Email
- Other
- Meeting
- Workshop
- Roadshow
- Dues**
- Fundraiser
- Media/PR

Set the field **Status** to **In Progress**.

**Campaign Information**

Campaign Owner: Cynthia Tao

Campaign Name:

Description:

Active: ☐

Type:

Status:

Start Date:

End Date:

**Campaign Detail**

**Dropdown Menu:**

- Planned
- None--
- Planned
- In Progress**
- Completed
- Canceled

Scroll down and in the **Dues** section, click on the down-arrowhead for **Period** to select the fiscal year that is affected by this new campaign. It should match the years you indicated as the Start and End Membership Dates.



**Dues**

Period: --None-- (selected: 2010-2011)

Due Date: --None-- [2/14/2011]

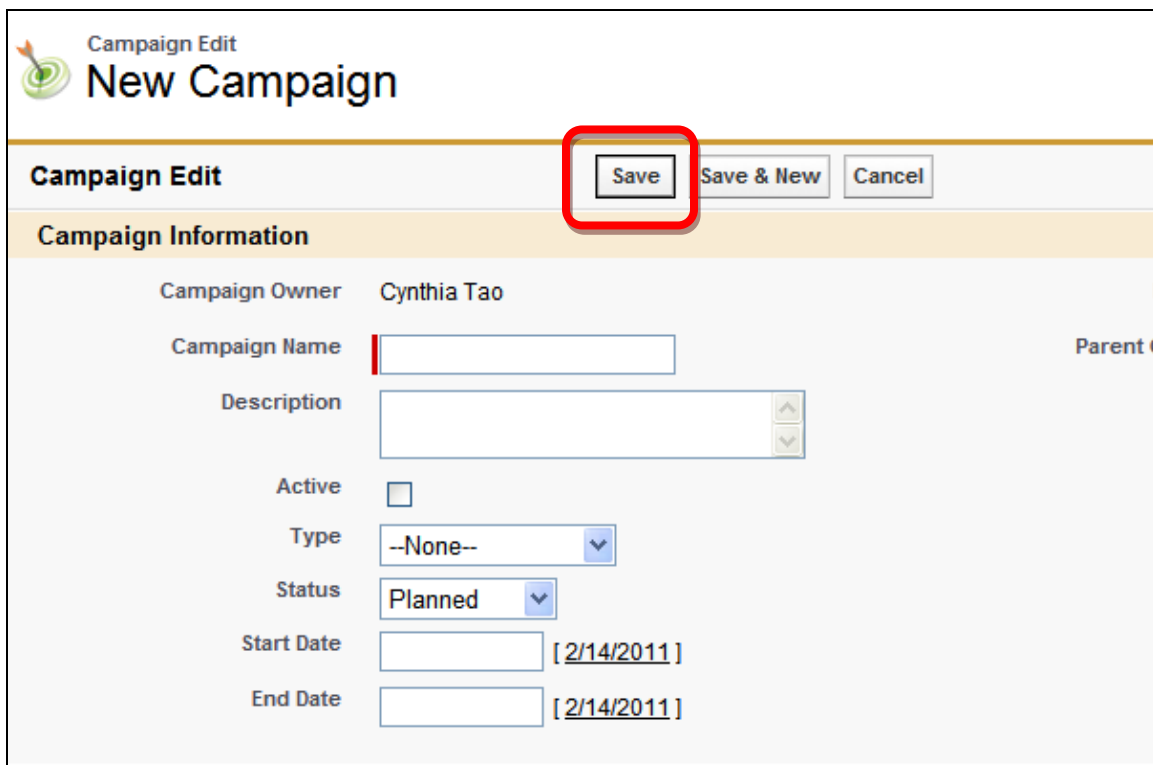
First Arrears Notice Date: 8/30/2011 [2/14/2011]

Second Arrears Notice Date: 10/30/2011 [2/14/2011]

Final Arrears Notice Date: 1/30/2011 [2/14/2011]

Buttons: Save, Save & New, Cancel

Note. The fields **Due Date**, **First Arrears Notice Date**, **Second Arrears Notice Date**, **Final Arrears Notice Date** are prefilled with values (using dates in July, August, October, and January, respectively). These can be changed by typing over the dates shown in the fields. When you are finished making your changes, press the **Save** button.



**Campaign Edit**

**New Campaign**

**Campaign Edit** Buttons: Save, Save & New, Cancel

**Campaign Information**

Campaign Owner: Cynthia Tao

Campaign Name: [Empty Field]

Description: [Empty Field]

Active: ☐

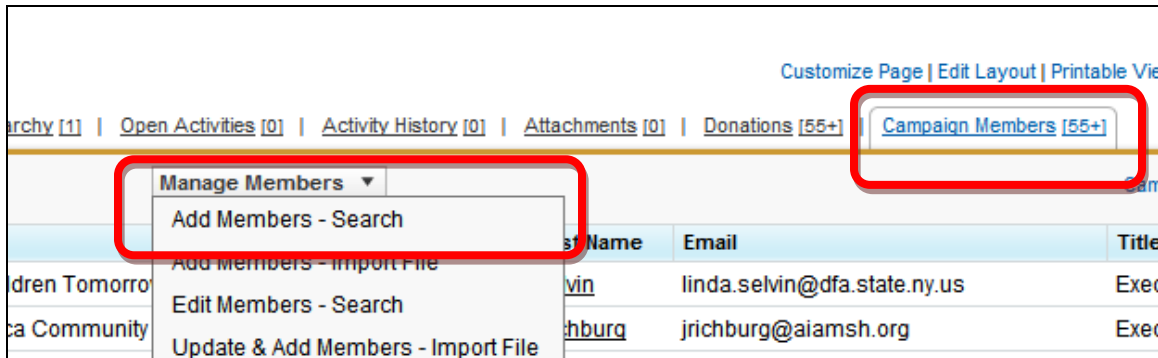
Type: --None--

Status: Planned

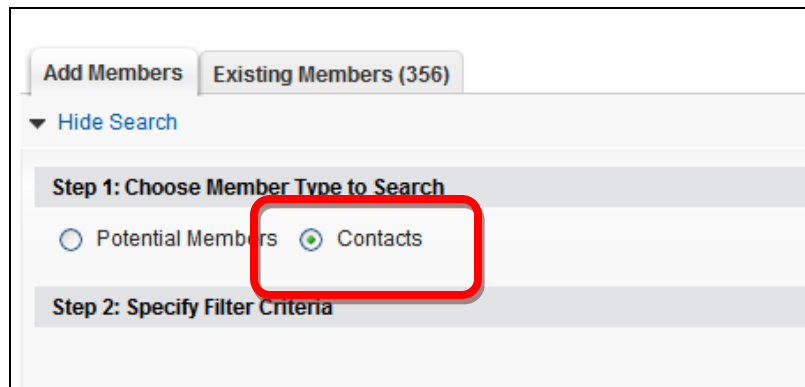
Start Date: [Empty Field] [2/14/2011]

End Date: [Empty Field] [2/14/2011]

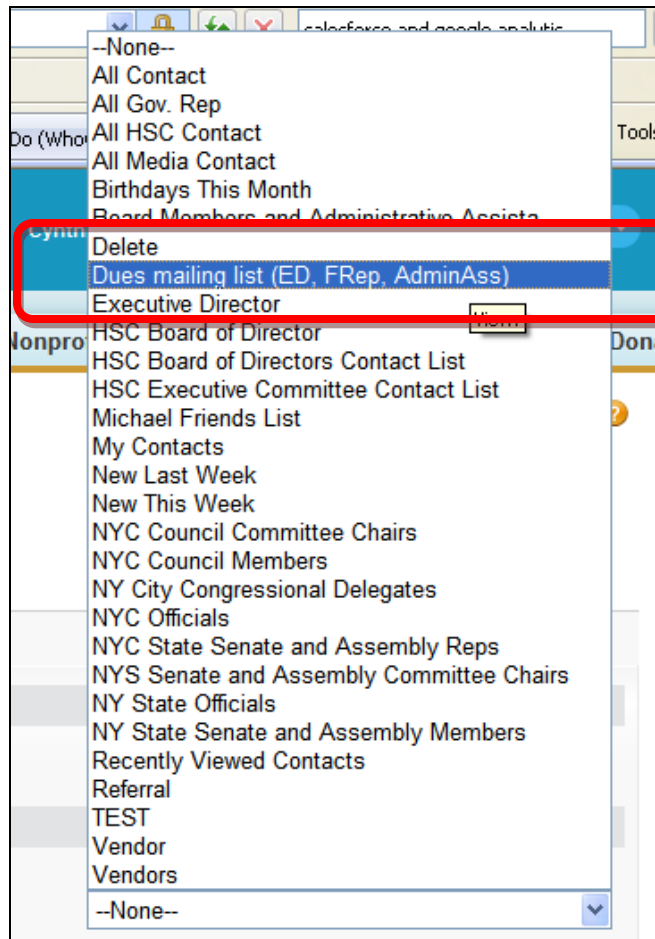
After you create the Dues Campaign in Salesforce, you need to create the list of members who are affected by the campaign. To create this list, place your cursor over **Campaign Members** link and you'll see a **Campaign Members** box from which you can click on **Manage Members**. Select **Add Member- Search** from the drop-down list.



You'll go to a new **Manage Members** screen. On **Step 1: Choose Member Type to Search**, select **Contacts**.



Under **Step 2: Specify Filter Criteria**, click on the down arrowhead in the box **Use Existing View**. Click on **Dues mailing list (ED, Frep, AdminAss)** from the pull-down entries. The list contains all of the HSC member organization's Executive Directors, Financial Reps, and Administrative Assistants.

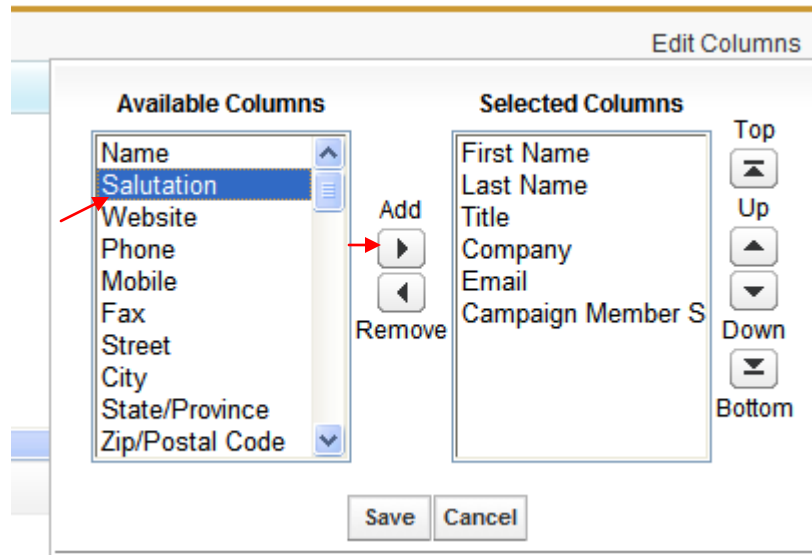


.To decheck members to the list, you can click the checkbox in front of each name

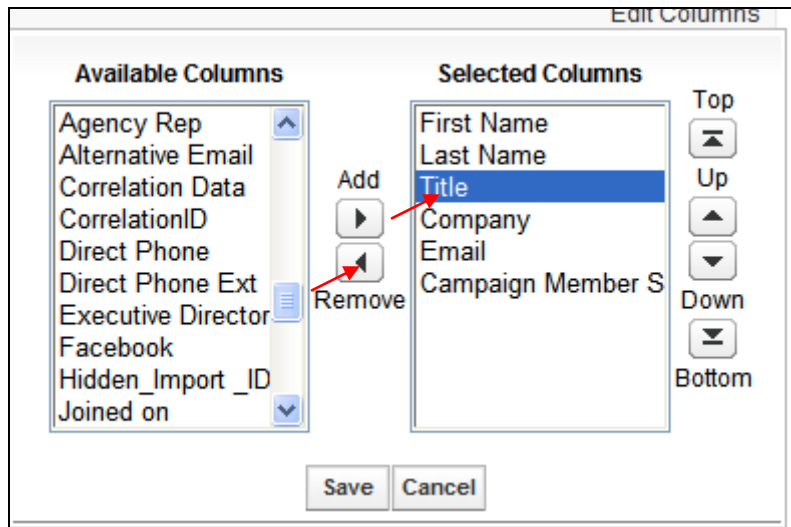
Add with Status ▾						
<input checked="" type="checkbox"/>	Salutation	Name	Title	Account Name	Email	Executive Committ...
<input checked="" type="checkbox"/>	Salutation	O, Cao	Executive Director	Asian American Fe...	cao.o@aafederatio...	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Mr.	Davis, Darwin M.	President/CEO	Black Equity Alliance	ddavis@blackequity...	<input type="checkbox"/>

A page typically has 100 names on it, so remember to repeat these steps so you can add members from each page of the list. To go to the next page, click **Next**.

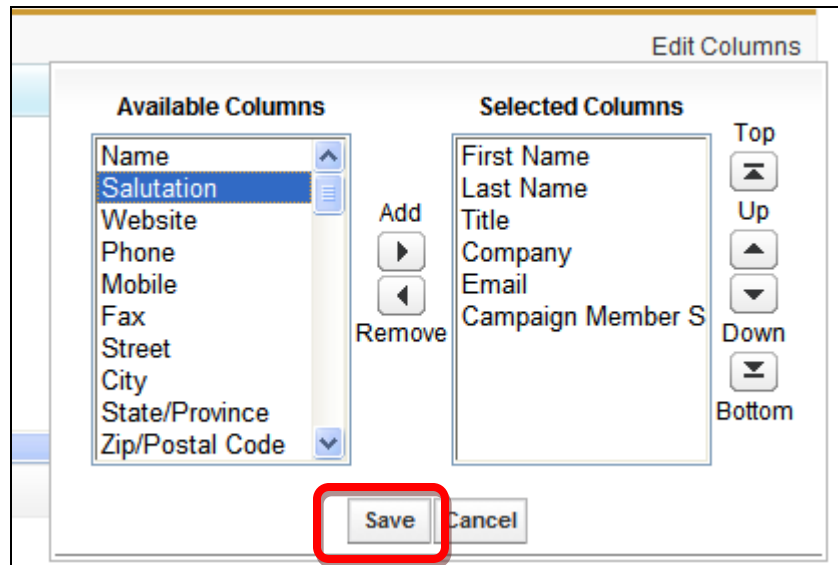




To remove a column select from the list **Select Columns** than press **Remove**.

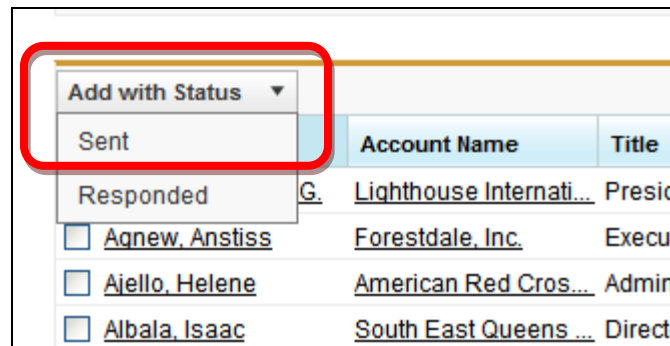


When you finish press **Save**.



When you have finished adding all members to your new campaign, select **Sent** from the drop-down list for **Add with Status**.

Note: even the field Status= Sent has no significance for HSC process, due to Salesforce implementation we have to pick a value between Sent/Responded.



Click on the link **Back to Campaign on the top of the page**.

Campaign

## Manage Members

\* [Back to Campaign: test](#)

✓ You have successfully added 1 member(s).

You can add more members to this campaign using the 'Add Members' tab.

**Add Members** Existing Members (367)

► [Show Filters](#)

Remove Update Status ▼

Action	Name ↑	Title	Company
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Ailson Overseth</a>	Executive Director	Partnership for After..

Press the **Create Dues** button.

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help](#)

[11](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Attachments \[0\]](#) | [Donations \[55+\]](#) | [Campaign Members \[55+\]](#)

[Edit](#) [Delete](#) [Clone](#) [Manage Members ▼](#) [Advanced Setup](#) [Create Dues](#) [Create Contract](#)

[ao \[Change\]](#) Total Potential Members 0 [Create Dues](#)

011 [\[View Hierarchy\]](#) Converted Potential Members 0

Total Contacts 356

If you want to check the list of Dues you created pressing the button **Create Dues**., click on the link **Donation**.

Campaign

## Dues 2010-2011

◀ [Back to List: Letterheads](#)

[Campaign Hierarchy \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Attachments \[0\]](#) | [Donations \[55+\]](#) | [Campaign Members \[55+\]](#)

**Donations** [New Donation](#)

Action	Donation Name	Account Name	Amount	Close Da
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Dues 2010-2011</a>	<a href="#">Agenda for Children Tomorrow</a>		7/7/2011
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Dues 2010-2011</a>	<a href="#">Aging in America Community Service</a>	\$500.00	7/7/2011
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Dues 2010-2011</a>	<a href="#">Alzheimer's Association, New York City Chapter</a>	\$1,000.00	7/7/2011

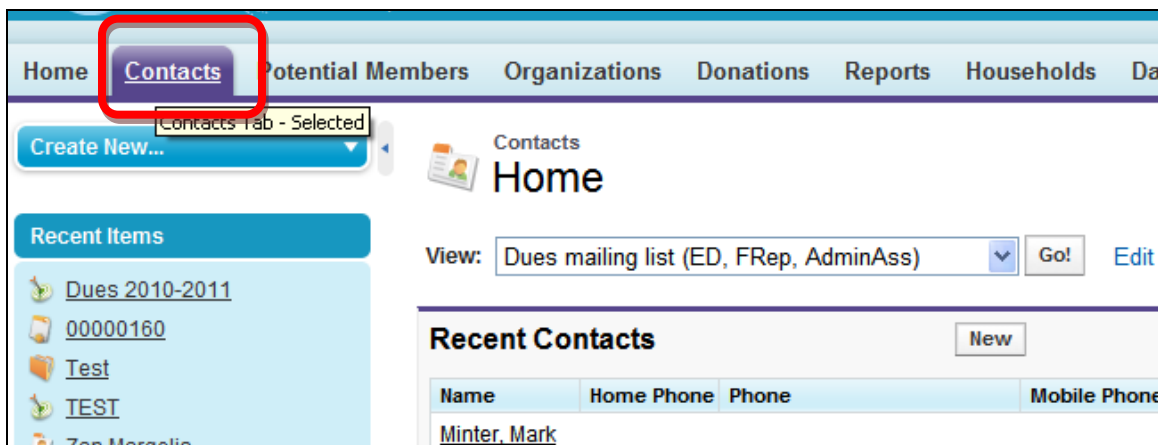


## 6. Create and Send Annual Dues Invoices

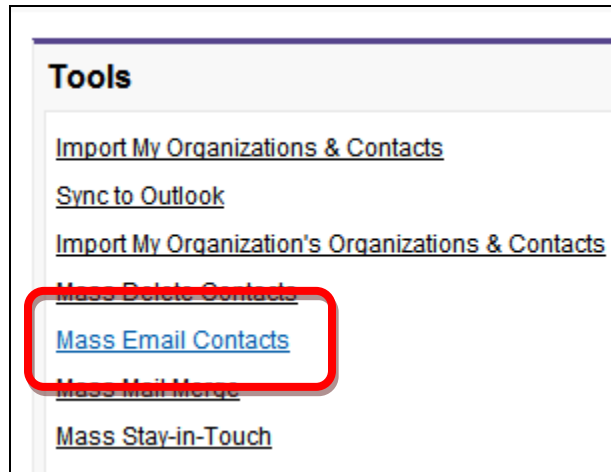
*Note: the process described below to manage the mass e-mail of Annual Dues Invoices is under development and may need to be modified.*

HSC's fiscal year starts on July 1 and ends June 30. HSC will send its first dues invoice prior to July 1 (typically in May), with second and third invoices sent to those members who have not yet paid, occurring in October and January, respectively.

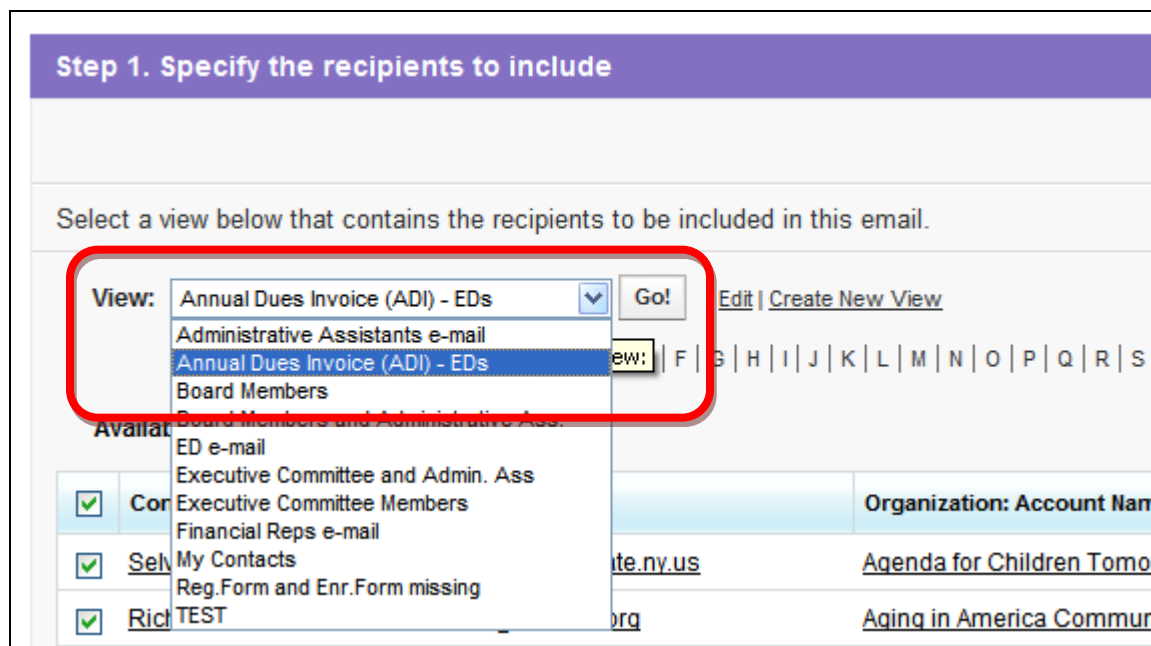
To send the first **Annual Dues Invoice** to all HSC member organizations, click on the **Contacts Tab**.



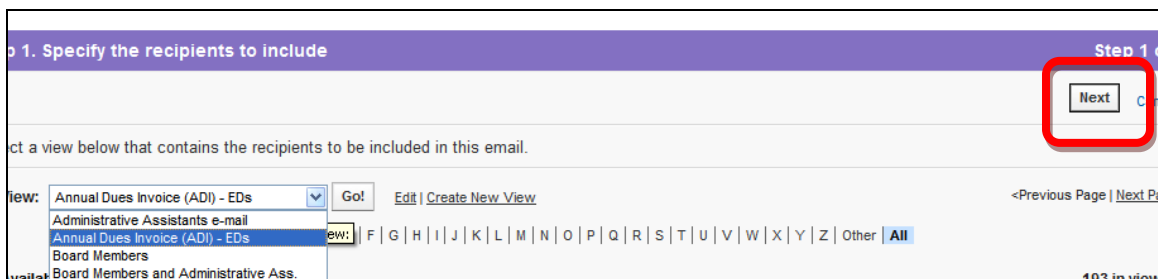
Then click on the link **Mass E-mail Contact** under the **Tools** section.



Select the **View Annual Dues Invoice (ADI) - EDs**. Press the **Go** button.



Click the **Next** button.



From **Folder** dropdown menu select **Dues Email Template**. Check **#7 –Membership Renewal Invoice**. Press **Next**.

Step 2. Select an email template

Please select an email template to use. To create a new template, you must exit this mass email process and create the new template in your personal setup section.

Folder: Dues Email Template

Preview	Name	Type	Description
<a href="#">Preview</a>	#7 - Membership Renewal Invoice	HTML	Membership Renewal Invoice

Previous Next

Select the **Option**. Press **Send**

Mass Email Confirmation

Step 3. Review and confirm

You currently have 53 recipient(s) selected to receive this email.

Processing Options

BCC me on one message ☒

Store an activity for each message ☒

Mass Email Name

Delivery Options

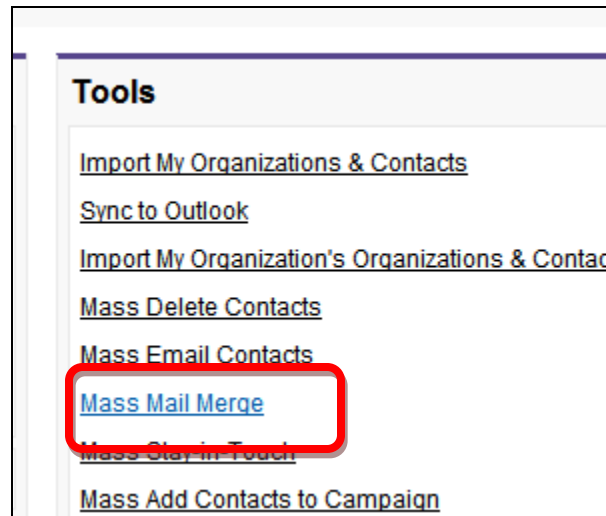
☒ Send now

☐ Schedule for delivery on 2/14/2011 2:08 PM Time Zone (GMT-08:00) Pacific Standard Time (America/Los\_Angeles)

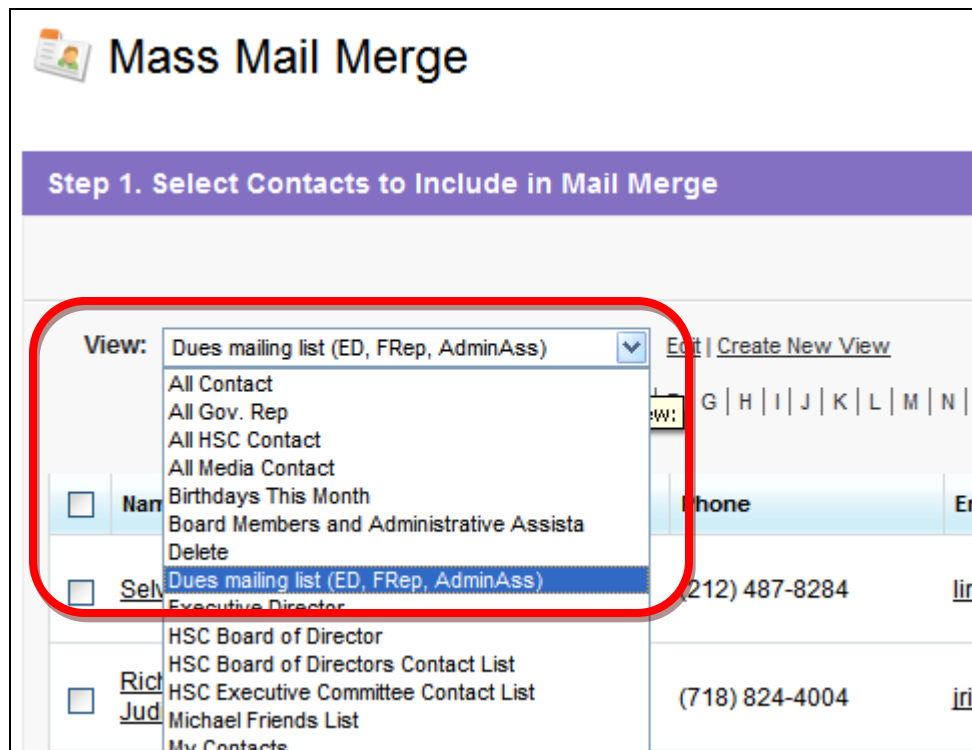
Previous Send

Repeat the steps described above to view the **Annual Dues Invoice (ADI)- FReps&Ad.Ass.** (a list of HSC Financial Representative and Administrative Assistant)

If you want to create and print a **Microsoft Word Version of the Invoice** click on the **Contact Tab** and then on the link **Mass E-mail Merge** under the **Tools** section.



Select the **Dues mailing list (ED, FRep, AdminAss) View**.



Check the box close the field **Name**

**Step 1. Select Contacts to Include in Mail Merge**

View: Dues mailing list (ED, FRep, AdminAss) Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N

<input type="checkbox"/>	Name	Account Name ↑	Title	Phone
<input type="checkbox"/>	<a href="#">Selvin, Linda</a>	<a href="#">Agenda for Children Tomorrow</a>	Executive Director	(212) 487-8284
<input type="checkbox"/>	<a href="#">Richburg,</a>	<a href="#">Aging in America Community</a>	Executive	(718) 824-4004

Select the checkbox **Documents**. Click on the **Next** button.

**Mass Mail Merge** Help for this

**Step 2. Select Document Types to Generate** Step

Previous **Next**

Select the types of documents that you want to generate. Also, select whether to add tasks on the records being merged.

Document Types

- ☒ Documents
- ☐ Envelopes
- ☐ Labels

Select a **Document Name**. Click **Finish**.

**Step 3. Select Document Templates** Step

Previous **Finish**

**Documents**

<b>Membership Renewal Invoice</b>	<b>Name:</b> Membership Renewal Invoice
Membership Renewal Invoice- First Reminder	<b>Description:</b>
Membership Renewal Invoice- Second Reminder	

Preview Template

**Document Options**

- ☒ Create only one Word file that includes all generated documents
- ☐ Create a separate Word file for each generated document

Click on the **Document Tab**. Click on the document **Name** you just created.

Documents Home Tell me more! | Help for this Page

Enter keywords to find matching documents.

---

**Document Folders**

Folder: My Personal Documents

---

**Recent Documents**  Recently Viewed

Name	Description	Type
<a href="#">Membership Renewal Invoice - Linda Selvin - 20110214214359.doc</a>		doc
template - Linda Selvin - 20110204211223.doc		doc
template - Linda Selvin - 20110204211311.doc		doc
mail - Linda Selvin - 20110204203944.doc		doc

Click on **View file** to save it as a Word document or to print it.

The screenshot shows a web application interface with a document detail section on the left and a file download window in the center.

**Document Detail**

Document Name	Membership R
Document Unique Name	X20110214214
Internal Use Only	<input type="checkbox"/>
Document Content Searchable	<input checked="" type="checkbox"/>
Folder	My Personal D
Author	Cynthia Tao
File Extension	doc
MIME Type	application/ms
Size	40KB
Description	
Keywords	

[View file](#)

Created By: Cynthia Tao, 2/14/2011 1:43 PM Modified By: Cynthia Tao, 2/14/2011

The file download window shows the URL: <https://c.na7.content.force.com/servlet/servlet.FileDownload?file=015...>

The document content is a "Membership Renewal invoice" for membership with HSC from 7/1/2011 to 6/30/2012. It includes the HSC logo and the text "Agenda for Children Tomorrow".

Click **E-mail** if you want to e-mail the document as an attachment.

Document  
**Membership Renewal Invoice - Linda Selvin - 20110214214359.doc**

[Back to List: Letterheads](#)

**Document Detail**

[Edit Properties](#) [Delete](#) [Replace Document](#) [Email Document](#)

Document Name	Membership Renewal Invoice - Linda Selvin - 20110214214359.doc
Document Unique Name	X20110214214359578_Membership_Renewal_Invoice_Linda_Selvin_doc

## 7. Updating Members' Dues Status

When a member agency pays its dues, it must be recorded in the database. To update the dues record, you start by searching for the appropriate **Dues Campaign** by **Name** using the **Search** box on any screen's header area.

Click on **Donation** and you'll see the list of all agencies who were invoiced for dues as part of the campaign you've chosen. From the list, you can click on **Edit** next to the record you want to update.

Campaign  
**Dues 2010-2011**

[Customize Page](#) | [Edit Layout](#) | [Printable View](#)

[Back to List: Letterheads](#)

[Campaign Hierarchy \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Attachments \[0\]](#) | [Donations \[55+\]](#) | [Campaign Members \[55+\]](#)

**Donations** [New Donation](#)

Action	Donation Name	Account Name	Amount	Close Date
<a href="#">Edit</a>   <a href="#">Del</a>	Dues 2010-2011	Agenda for Children Tomorrow		7/7/2011
<a href="#">Edit</a>   <a href="#">Del</a>	Dues 2010-2011	Aging in America Community Service	\$500.00	7/7/2011
<a href="#">Edit</a>   <a href="#">Del</a>	Dues 2010-2011	Alzheimer's Association, New York City Chapter	\$1,000.00	7/7/2011

Update the dues fields that you want to change. If you are updating that the member paid its dues, you should fill in all the fields in the **Dues** section, including **Payment Date**, **Dues Received**, and the appropriate **Invoiced Date**.

Press **Save**. For field details and descriptions see Chapter: [Reference Section](#) ;

Paragraph: [Object Fields](#)

**Donation Edit** Help for

**Dues 2010-2011**

---

**Donation Edit** Save Save & New Cancel

---

**Donation Information** = Required

<p>Donation Owner: Cynthia Tao</p> <p>Donation Name: <input type="text" value="Dues 2010-2011"/></p> <p>Description: <input type="text"/></p> <p>Account Name: <input type="text" value="Agenda for Children Tomo"/> </p> <p>Primary Campaign Source: <input type="text" value="Dues 2010-2011"/> </p>	<p>Close Date: <input type="text" value="7/7/2011"/> <span style="margin-left: 10px;">[ 2/14/2011 ]</span></p> <p>Next Step: <input type="text"/></p> <p>Amount: <input type="text"/></p> <p>Stage: <input type="text" value="Pledged"/> </p> <p>Probability (%): <input type="text" value="50"/></p> <p>Notes: <input type="text"/></p>
--	--

---

**Dues Category**

Annual Operating Expenses (Range): <input type="text" value="--None--"/>	Dues: <input type="text" value="--None--"/>
--	---

---

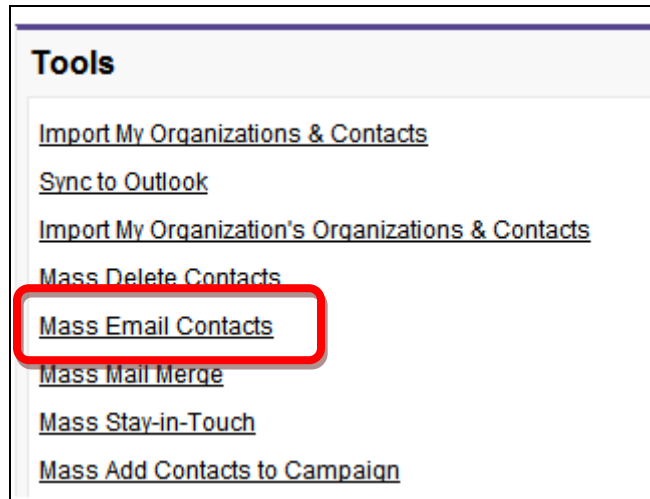
**Dues**

<p>Period: <input type="text" value="2010-2011"/> </p> <p>Payment Date: <input type="text" value="7/1/2011"/> <span style="margin-left: 10px;">[ 2/14/2011 ]</span></p> <p>Fist Invoiced Date: <input type="text"/> <span style="margin-left: 10px;">[ 2/14/2011 ]</span></p> <p>Second Invoiced Date: <input type="text"/> <span style="margin-left: 10px;">[ 2/14/2011 ]</span></p> <p>Third Invoiced Date: <input type="text"/> <span style="margin-left: 10px;">[ 2/14/2011 ]</span></p>	<p>Annual Operating Expenses (Actual): <input type="text"/></p> <p>Past Dues: <input type="text" value="250"/></p> <p>Dues Invoiced: <input type="text" value="250"/></p> <p>Dues Received: <input type="text"/></p>
--	--

## 8. Sending Additional Invoices

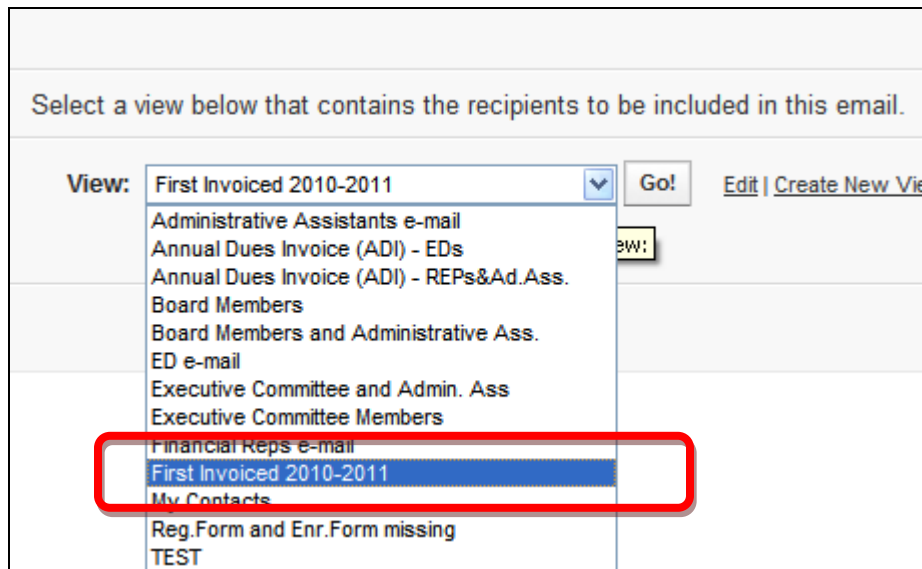
To mass e-mail Executive Directors, Administrative Assistants and Financial Rep of HSC member organizations whom have not paid their dues, go to the **Contact Tab**, and under the section **Tools**, click the link **Mass E-mail Contact**.





Select the view **First Invoiced** [*start membership year – end membership year*].

Press the **Go!** button.



The list (prepared by the SF System administrator) will show EDs, Administrative Assistant, and Financial Rep e-mails of HSC member organizations that have not yet paid their Dues.

Press **Next**

Step 1 of 4

Next

Cancel

is email.

[Create New View](#)

[K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#) | Other [All](#)

50 in view

Select a **Template** (e.g. #1 Annual Dues Invoiced (ADI) First Reminder). Click **Next**.

Step 2. Select an email template

Previous

Please select an email template to use. To create a new template, you must exit this mass email process and create the new template in your personal section.

Folder: Dues Email Template

Preview	Name	Type	Description
<a href="#">Preview</a>	<input type="radio"/> # 7 - Membership Renewal Invoice	HTML	Membership Renewal Invoice
<a href="#">Preview</a>	<input checked="" type="radio"/> #1 Annual Dues Invoice (ADI) First Reminder	Custom	REF: Re-Invoice e-mail.doc/Dues Collection Schedule
<a href="#">Preview</a>	<input type="radio"/> #2 Annual Dues Invoice (ADI) Second Reminder	Custom	REF: Re-Invoice e-mail.doc
<a href="#">Preview</a>	<input type="radio"/> #3 Annual Dues Invoice (ADI) Third Reminder	Custom	REF: Re-Invoice e-mail.doc

Click **Send**.

Step 3

Previous

Send

= Required Information

For the Second and Third Invoices you will find the view **Second Invoice** [*start membership year – end membership year*] and **Third Invoice** [*start membership year – end membership year*].

## 9. Terminating Members

If an organization's membership is terminated, you can update their status in the database. You can start by finding the organization's database record by typing the name of the organization in the **Search** box.

In the **Membership Status** section, select **Lapsed** from the dropdown list in the **Membership Status** field. You should also fill in the fields, **Date of Termination** and **Reason to Terminate**.

The screenshot shows a web form titled "Membership Status". On the left, there is a dropdown menu for "Membership Status" with options: "--None--", "--None--", "Current Member", and "Lapsed". The "Lapsed" option is highlighted. Below this are radio buttons for "New", "Rejoined", and "Full Membership". On the right side of the form, there are four input fields: "Affiliation Date", "Date of Rejoin", "Date of Termination", and "Reason to Terminate". Each of these fields has a red box around it. The "Date of Termination" field has a "[ 2/1" label next to it. The "Reason to Terminate" field is a larger text area.

## Tracking Donations

HSC may receive donations from individuals due to a campaign (such as for the annual Leadership Awards Reception or the Who Cares? I Do. campaign) or as an unsolicited donation (such as from the website, which happens rarely). HSC also receives donations from organizations due to a campaign (such as the Leadership Awards Reception or a special assessment) or because of individual programs (such as a grant from a Foundation). In the case of organizational donations, you may want to record the donation with both the organization and individual contact's name.

## Received from Individuals in Response to a Campaign

If the donation is associated with a campaign that is not yet in the database, you need to create the campaign first (**Campaigns Tab>> Button New**) and fill the field **Primary Campaign source** with the name of the Campaign (see step described in Section: [Create a New Dues Campaign](#)).

After the campaign is created, you can update the individual's record by first finding the individual by typing his/her name in the **Search** box at the top of any screen. If you click on **Donations** at the top of the **Contact** screen, you will see a list of donations already given by the individual. To add a new donation, click on the **New Donation** button.

You will go to the **Select Donation Record Type** screen.


Select the **Record Type of new record** from the drop-down arrowhead among:

To track donation you will use the Record Type values:

- Donation: if you are tracking a donation (e.g. WCID -Who Cares I Do? - contribution)
- LAR: for LAR donation

The Dues field is used to track Dues; The field Grant is used for tracking Grant from Foundation or Corporation. Don't use the field Dues and Grant to tack donation.

The field Major Gift and Matching Donation are Salesforce default field not used for HSC tracking purpose.



New Donation

## Select Donation Record Type

Select a record type for the new donation. To skip this page in the future, change your record

### Select Donation Record Type

Record Type of new record

LAR

Donation
Dues
Grant
LAR
Major Gift
Matching Donation

Continue
Cancel

Available Donation Record Types

Record Type Name	Description
Donation	Donation
Dues	Membership Dues
Grant	Grant Received/Pledged/Prospected/Refused
LAR	LAR
Major Gift	Large Donation from a Major Donor
Matching Donation	Matching Donation from an Donor's Employer or other Organization

After you choose a **Record Type** and click Continue, you will see the **Edit New Donation** screen.

Fill in the record. Use the Campaign name for the required **Donation Name** field. Use the person's name for the required **Account Name** field. Review the remainder of the fields and fill them in as appropriate. Press **Save**.

If the Donation is not related to a Campaign don't fill the field Primary Campaign Source.

**Donation Edit** [Save] [Save & New] [Cancel]

**Donation Information**

Donation Record Type: LAR

Donation Name: LAR 2010

Description: [Empty text area]

Account Name: UJA-Federation of New York

**Primary Campaign Source: LAR 2010**

Potential Member: [Empty text area]

## Received from Organizations in Response to a Campaign

After the campaign is created, you can update the organization's record by first finding the organization by typing its name in the **Search** box at the top of any screen. If you click on **Donations** at the top of the **Organization** screen, you will see a list of donations already given by the organization. To add a new donation, click on the **New Account Donation** button.

Contracts [0] | Contact Roles [7] | Open Activities [0] | Contacts [141] | Umbrella/Coalition Organizations [1] | **Donations [2]**

**Donations** [New Account Donation]

Action	Donation Name	Stage
Edit   Del	Dues 2010-2011	Posted
Edit   Del	LAR 2010	Withdrawn

You will go to the **Select Donation Record Type** screen. Select the **Record Type** of **new record** from the drop-down arrowhead.

Select the **Record Type of new record** from the drop-down arrowhead among:

To track donation you will use the values:

- Donation: if you are tracking a donation (e.g. WCID -Who Cares I Do? - contribution)
- LAR: for LAR donation

The Dues field is used to track Dues; The field Grant is used for tracking Grant from Foundation or Corporation. Don't use the field Dues and Grant to tack donation.

The field Major Gift and Matching Donation are Salesforce default fields not used for HSC tracking purpose.

**Select Donation Record Type**

Record Type of new record

Grant  
Donation  
Dues  
Grant  
LAR  
Major Gift  
Matching Donation

Cancel

Available Donation Record Types

Record Type Name	Description
------------------	-------------

After you choose a **Record Type**, click Continue and you will see the **Edit New Donation** screen.

**Select Donation Record Type**

Record Type of new record

Grant

Continue Cancel

Available Donation Record Types

Fill in the record. Use the Campaign name for the required **Donation Name** field. Use the organization's name for the required **Account Name** field. Review the remainder of the fields and fill them in as appropriate. Press **Save**.

The screenshot shows a web application window titled "Donation Edit" with a sub-header "New Donation". Below the header is a yellow bar containing the text "Donation Edit" and three buttons: "Save", "Save & New", and "Cancel". The "Save" button is highlighted with a red rectangular box. Below this bar is a section titled "Donation Information" with a yellow background. This section contains several fields: "Donation Record Type" (Grant), "Donation Name" (BronxWorks, Inc. - Donati), "Account Name" (BronxWorks, Inc.), "Primary Campaign Source", "Areas of Interest", "Donation Owner", "Close Date", "Amount", "Invoiced Number", and "Check number". The "Donation Name" and "Account Name" fields are highlighted with red vertical bars on their left sides. The "Amount" field has a question mark icon next to it. The "Primary Campaign Source" and "Areas of Interest" fields have search icons next to them. The "Areas of Interest" field has a scroll bar on its right side.

### Associating a Donation with Both an Organization and Individual

If you want to associate the donation with both an organization and a contact, you can do so after you have linked the donation to the organization, as detailed in the section above. In the **Donation** screen, place your cursor on the **Contact Roles** link, then click on the **New** button in the window that appears.



Donation LAR 2010

Customize Page | Edit Layout | Printable View | Help for this Page ?

Show Chatter + Follow

Open Activities [0] | Activity History [0] | Notes & Attachments [0] | **Contact Roles [1]** | Stage History [3]

**Contact Roles** New Contact Roles Help ?

Action	Contact Name	Account Name	Email	Phone	Role	Primary
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">John Ruskay</a>	<a href="#">UJA-Federation of New York</a>	<a href="#">ruskay@ujafedny.org</a>	(212) 836-1710		<input checked="" type="checkbox"/>

Donation Name LAR 2010 Stage Posted

A list of Contact Roles for that campaign will appear. Select the contact you want to link to the Donation by clicking on the radio button next to the contact's name.

**Contact Roles for LAR 2010** Save Cancel

Primary	Contact	Role
<input type="radio"/>	No Primary Contact	
<input checked="" type="radio"/>	<a href="#">John Ruskay</a>	--None--
<input type="radio"/>	<a href="#">Cara Berkowitz</a>	--None--
<input type="radio"/>	<a href="#">Gigi Garvey</a>	Business User
<input type="radio"/>	<a href="#">Alyson Grant</a>	Decision Maker
<input type="radio"/>	<a href="#">Idella James</a>	Economic Buyer
<input type="radio"/>	<a href="#">Connie Mendoza</a>	Economic Decision Maker
<input type="radio"/>	<a href="#">Stephen D. Solender</a>	Evaluator
<input type="radio"/>	<a href="#">Ronald Soloway</a>	Executive
<input type="radio"/>		Influencer
<input type="radio"/>		Technical Buyer
<input type="radio"/>		Other
<input type="radio"/>		--None--

Use the down arrowhead to select a **Role** for the contact.

Contact	Role
No Primary Contact	
John Ruskay	Executive
Cara Berkowitz	--None--
Gigi Garvey	Business User
Alyson Grant	Decision Maker
Idella James	Economic Buyer
Connie Mendoza	Economic Decision Maker
Stephen D. Solender	Evaluator
	Executive
	Influencer
	Technical Buyer
	Other

You can change the value of the drop down menu **Role** by changing your personal settings. See the Official Salesforce Guide **sf - Spring 11.pdf** (under U:\HSC\Program Areas\Membership Services\Intern Guidelines\SalesForce\HSC documentation\Official SF documentation

### ***Updating Conflict of Interest and Board Commitment Forms***

All Board Members need to sign the **Board Commitment Form** (to explicitly state their support of HSC) and the **Conflict of Interest Form** annually. You can track the return of these forms in the database through a variety of methods.

You can update the fields in the Organization screen, track the information as a Salesforce **Contract**, or create a campaign through which to track the return of the forms.

### **Through Organization Screens**

Search the Organization you want to update using the toolbar **Search**.

Press **Edit**.

Update the fields under the Section Board **Commitment/COI**

▼ Board Commitment/COI	
Promos HSC Mission	
Support HSC	
Set Strategy Directly	
▼ System Information	
Created By	<a href="#">Cynthia Tao</a> , 2/24/2011 7:36 PM
<div> <div>Edit</div> <div>Delete</div> <div>Sharing</div> </div>	

## ***Tracking the Receipt of Foundation Grants***

Grants are tracked in Salesforce as **Donations**.

### **Adding New Grants**

To add new grants, you can first find the organization by typing the organization name in the **Search** bar at the top of each screen.

The image shows a search bar with the text 'IBM' entered. A red rectangle highlights the search bar and the dropdown menu. The dropdown menu contains the following options:

- Search for IBM\* (starts with)
- Search Options...
- Search for IBM

Place your cursor over the **Donations** link and press on the **New Account Donation** button to add a new donation.

« Back to List: Organizations

Contracts [0] | Open Activities [0] | Contacts [4] | Contact Roles [0] | Umbrella/Coalition Organizations [0] | Affiliated Contacts [4] | **Donations [3]** | Donations Help

**Donations** New Account Donation

Action	Donation Name	Stage	Amount	Notes
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">GRANT 2010-2011</a>	Posted	\$10,700.00	Got PM workshop, held call with Pam 2/25/10. Also getting \$700 for workshop-related expenses; sent 2/17 for workshop, 4/30 for food allowance. Received \$700 7/6/10. PM course completed June 2010. Submitted Grant Request Letter 2/11 for Social Medi...
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">GRANT 2010-2011</a>	Posted	\$50,000.00	Recvd 50K via UWNYP on 5/7 for tech. Submitted new 501c3 letter and got OK about funding. Sent 5/12 email to Haas, got verbal ack 6/28/10 that no report needed.
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">GRANT</a>	Prospecting		Requested Tech money; may get workshop valued at \$10K

Contracts [0] | Open Activities [0] | Contacts [4] | Contact Roles [0] | Umbrella/Coalition Organizations [0] | Affiliated Contacts [4] | **Donations [3]** | Donations Help

**Donations** New Account Donation

Action	Donation Name	Stage	Amount	Notes
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">GRANT 2010-2011</a>	Posted	\$10,700.00	Got PM workshop, held call with Pam 2/25/10. Also getting \$700 for workshop-related expenses; sent 2/17 for workshop, 4/30 for food allowance. Received \$700 7/6/10. PM course completed June 2010. Submitted Grant Request Letter 2/11 for Social Medi...
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">GRANT 2010-2011</a>	Posted	\$50,000.00	Recvd 50K via UWNYP on 5/7 for tech. Submitted new 501c3 letter and got OK about funding. Sent 5/12 email to Haas, got verbal ack 6/28/10 that no report needed.
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">GRANT</a>	Prospecting		Requested Tech money; may get workshop valued at \$10K

You will go to the **Select Donation Record Type** screen. Select **Grant** as the **Record Type of new record** from the drop-down arrowhead. The field Grant is used for tracking Grant from Foundation or Corporation.

Regarding the other value for **Record Type of new record** field: Donation

- Donation: is used to track donation as WCID (Who Cares I Do?) contribution
- LAR: is used for LAR donation.

The field Major Gift and Matching Donation are Salesforce default fields not used for HSC tracking purpose.

**Select Donation Record Type**

Record Type of new record

Grant

Donation

Dues

Grant

LAR

Major Gift

Matching Donation

Cancel

Available Donation Record

Record Type Name	Description
------------------	-------------

**Select Donation Record Type**

Record Type of new record

Grant

Donation

Dues

Grant

LAR

Major Gift

Matching Donation

Cancel

Available Donation Record

Press **Continue**.

**Select Donation Record Type**

Record Type of new record

Grant

Continue

Cancel

Insert the Grant information. Press **Save**.

**Donation Edit**

Save Save & New Cancel

**Donation Information** | = Required

Donation Record Type	Grant	Donation Owner	Cynthia Tao
Donation Name	IBM Corporation- Donation	Close Date	[ 3/15/2011 ]
Account Name	IBM Corporation	Amount	
Primary Campaign Source		Invoiced Number	
Areas of Interest		Check number	
Program		Stage	--None--

To get more info about the Grant's fields go to the [Section Object Field >> Donation Fields](#)

## Updating Existing Grants

To update an existing grant, you should find the name of the organization who provided the grant using the **Search** box on the top of any screen. Click on the **Donation** link; you will see a list of existing donations from that organization. Click on **Edit** to the left of the record you want to update in the Grant list.

Contracts [0] | Open Activities [0] | Contacts [4] | Contact Roles [0] | Umbrella [0]

**Donations** New Account Donation

Action	Donation Name	Stage	Amount	Notes
<b>Edit</b>   Del	GRANT 2010-2011	Posted	\$10,700.00	Got PM workshop, held call with P 2/17 for workshop, 4/30 for food a 2010.Submitted Grant Request L
Edit   Del	GRANT 2010-2011	Posted	\$50,000.00	Recvd 50K via UWNYS on 5/7 for email to Haas, got verbal ack 6/2
Edit   Del	GRANT	Prospecting		Requested Tech money; may get

Update the fields and press **Save**.

**Donation Edit**

Save Save & New Cancel

**Donation Information** | = Required

Donation Record Type	Grant	Donation Owner	Cynthia Tao
Donation Name	IBM Corporation- Donation	Close Date	[ 3/15/2011 ]
Account Name	IBM Corporation	Amount	
Primary Campaign Source		Invoiced Number	
Areas of Interest		Check number	
Program		Stage	--None--

To get more info about the Grant's fields go to the [Section Object Field >> Donation Fields](#)

## ***Finding and Running Reports***

Several types of reports were created and stored already in the Salesforce database for the Membership and Development tasks. To see the types of reports that were created, click on the **Report** tab at the top of any screen. Note that for all reports, you can click on the field name at the top of the report to reorder the report by that field (similar to what you can do with a spreadsheet); the fields can be sorted in ascending or descending order by clicking on the field name.

There is a **Report Folder** section where you can click on the down arrow-head in the **Folder** box. This provides a list of the types of reports that have already been created.

The screenshot shows a web interface with a top navigation bar containing links: Members, Organizations, Donations, Reports, Households, and Dashboard. The 'Reports' link is highlighted with a red box. Below the navigation bar is the 'Reports Home' section, which includes a search bar with the text 'Enter keywords to find matching custom reports.' and a 'Find Report' button. Below this is the 'Report Folders' section, which contains a dropdown menu labeled 'Folder' with 'Member Reports' selected, a 'Go!' button, and links for 'Edit' and 'Create New Folder'. The 'Report Folders' section is also highlighted with a red box.

## Current Members Reports

To see reports about current members, you can click on the down arrowhead and select **Members Reports**. This section describes those reports.

- **#1- Member Services Report –[Month YYYY] (e.g Member Services Report- January 2010 )**

This report shows the membership services that each HSC member is using.

Account Name	Government Contact Opportunities	Free/Discounted Workshops	Discounts on Trainings	Contract Consulting	White Ink/Stylistic Press	MOA	Committee Membership
<a href="#">Child Care, Inc.</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Mental Health Association of New York City</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">United Way of</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



[New York](#)  
[City](#)

▪ **#2 Dues** [*Membership Start Date- Membership End Date*] (e.g. **Dues 2010-2011**)

This report shows the dues invoiced and received for each member. At the top of the report, the field to the right of **Campaign Name** represents the sum for both Dues Invoiced and Dues Received.

Account Name	Dues Invoiced	Dues Received
Campaign Name: <a href="#">Dues 2010-2011</a> (191 records)		
	\$395,250	\$308,175
<a href="#">Agenda for Children Tomorrow</a>	\$250	-
<a href="#">Aging in America Community Service</a>	\$500	\$500
<a href="#">Alzheimer's Association, New York City Chapter</a>	\$1,000	\$1,000
<a href="#">American Group Psychotherapy Association</a>	\$500	\$500

▪ **#3 COI Form/Board Commitment**

This report lists the organizations on the Board (with Executive Director) that are expected to return the COI and Board Commitment forms. . The report shows all the COI/BOARD Commitment Form signed and not signed.

Account Name	Full Name	Conflict of Interest	Board Commitment Form Signed	Email
<a href="#">The Children's Village</a>	Dr. Jeremy Kohomban	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="mailto:jkohomban@childrensvillage.org">jkohomban@childrensvillage.org</a>
<a href="#">Comunilife, Inc.</a>	Dr. Rosa M. Gil	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="mailto:rgil@comunilife.org">rgil@comunilife.org</a>
<a href="#">Asian American Federation</a>	Mr. Cao O	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="mailto:cao.o@aafederation.org">cao.o@aafederation.org</a>

<a href="#">Black Equity Alliance</a>	Mr. Darwin M. Davis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="mailto:ddavis@blackequityalliance.org">ddavis@blackequityalliance.org</a>
---------------------------------------	---------------------	-------------------------------------	-------------------------------------	--

▪ **#6 COI Form/Board Commitment not signed**

This report lists the organizations on the Board (with Executive Director) that did not return the COI of the Board Commitment forms signed.

Account Name	Full Name	Conflict of Interest	Board Commitment Form Signed	Email
<a href="#">The Children's Village</a>	Dr. Jeremy Kohomban	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="mailto:jkohomban@childrensvillage.org">jkohomban@childrensvillage.org</a>
<a href="#">Comunilife, Inc.</a>	Dr. Rosa M. Gil	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="mailto:rgil@comunilife.org">rgil@comunilife.org</a>
<a href="#">Asian American Federation</a>	Mr. Cao O	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="mailto:cao.o@aafederation.org">cao.o@aafederation.org</a>
<a href="#">Black Equity Alliance</a>	Mr. Darwin M. Davis	<input type="checkbox"/>	<input type="checkbox"/>	<a href="mailto:ddavis@blackequityalliance.org">ddavis@blackequityalliance.org</a>

▪ **#7 Dues [start membership year – end membership year] Not Paid (e.g. Dues 2010-2011 Not Paid)**

This report shows the organizations who have not yet paid their dues for the current fiscal year. .

Account Name	Dues Invoiced	Dues Received
Campaign Name: <a href="#">Dues 2010-2011</a> (45 records)		
	\$87,000	\$0
<a href="#">Agenda for Children Tomorrow</a>	\$250	-
<a href="#">Big Brothers/Big Sisters of New York City</a>	\$3,000	-
<a href="#">Black Agency Executives</a>	\$250	-

- **#5 Dues 2010-2011 Contact List**

List of HSC Member Organizations' Executive Directors, Financial Reps, and Administrative Assistants who may need to be contacted for dues payment

Campaign Name	Dues Invoiced	Dues Received	Full Name	Status	Phone	Direct Phone	Direct Phone Ext.	Title	E-mail
Account Name: Account Name: <a href="#">Agenda for Children Tomorrow</a> (2 records)									
<a href="#">Dues 2010-2011</a>	\$250	-	<a href="#">Linda Selvin</a>	Former	(212) 487-8284	(212) 487-8284	-	Executive Director	<a href="mailto:linda.selvin@dfa.state.ny.us">linda.selvin@dfa.state.ny.us</a>
<a href="#">Dues 2010-2011</a>	-	-	<a href="#">Brian McGowan</a>	Current	-	(212) 487-8618	-	Administrative Assistant	<a href="mailto:brian.mcgowen@dfa.state.ny.us">brian.mcgowen@dfa.state.ny.us</a>
Account Name: Account Name: <a href="#">Aging in America Community Service</a> (1 record)									
<a href="#">Dues 2010-2011</a>	\$500	\$500	<a href="#">Judith Richburg</a>	Current	(718) 824-4004	(718) 824-4004	ext. 7935	Executive Director	<a href="mailto:jrichburg@aiamsh.org">jrichburg@aiamsh.org</a>

## Sample Reports that Are Location-Specific

The following reports were created to identify information about sites in Brooklyn. They are shown in this guide to help identify ways that reports can be created for specific purposes. The goal was to understand which of HSC's member organizations provided services in Brooklyn.

- **Brooklyn Service Site**

List of Organizations with Main Address NOT in Brooklyn and Service Sites IN Brooklyn – with details about each service site.

Borough	Zip Code: Zip Code	Street Address	Service Provided	Invoiced Dues	Total Dues		
Billing Street	Billing City	Borough	Zip Code	Street Address	Service Provided	Dues	Total Dues
Account Name: <a href="#">Agenda for Children Tomorrow</a> (1 record)							
\$250.00							
2 Washington Street 20th Floor	New York	Brooklyn	<a href="#">11221</a>	-	Family Support (Adoption)		

#### ▪ Brooklyn Service Site -List

List of Organizations with Main Address NOT in Brooklyn and Service Sites IN Brooklyn, but without the details about service sites

	Dues	Total Dues
Account Name: <a href="#">Agenda for Children Tomorrow</a> (1 record)	\$250.00	
Account Name: <a href="#">Barrier Free Living</a> (2 records)	\$1,000.00	
Account Name: <a href="#">Bronx Jewish Community Council</a> (5 records)	\$500.00	
Account Name: <a href="#">Catholic Charities Community Services, Archdiocese of New York</a> (5 records)	\$5,000.00	

#### ▪ Brookl. ServSite with ED's on HSC Board

List of Organizations with ED who is on HS's Board of Directors that have Main Address IN Brooklyn and provide services in Brooklyn.

Account Name: <a href="#">CAMBA</a> (35 records)			\$7,500.00
Full Name: <a href="#">Joanne M. Oplustil</a> (35 records)			
Billing Address: 1720 Church Avenue 2nd Floor, Brooklyn, NY 11226 (35 records)			
Brooklyn	<a href="#">11223</a>	-	Youth Services
Brooklyn	<a href="#">11226</a>	-	Youth Services
Brooklyn	<a href="#">11216</a>	-	Youth Services

#### ▪ Brooklyn Based Organization

List of Organization with Main Address IN Brooklyn

Account Name	Billing Street	Billing City	Billing Zip/Postal Code	First Name	Last Name	Board	Dues	Annual Revenue
<a href="#">Baltic Street AEH, Inc.</a>	250 Baltic Street 1st Floor	Brooklyn	11201	<a href="#">Isaac</a>	<a href="#">Brown</a>	<input type="checkbox"/>	\$500	\$500
<a href="#">BHRAGS Home Care Corp.</a>	444 Thomas S. Boyland St.	Brooklyn	11212	<a href="#">Eve</a>	<a href="#">Vaval</a>	<input type="checkbox"/>	\$500	\$500

## Potential Member Reports

To see reports about potential members, you can click on the down arrowhead and select **Potential Members**. This section describes those reports.

Members Organizations Donations **Reports** Households Dashboards Campaigns About

Reports

## Potential Members

Folder: Potential Members [Edit](#) [Create New Folder](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#)

[Create New Custom Report](#)

Action	Report Name ↑	Description	Last Modified
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">#1 Potential Members</a>		<a href="#">Tao, Cynthia</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">#2 Referred Potential</a>		<a href="#">Tao, Cynthia</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">#3 Referrals</a>		<a href="#">Tao, Cynthia</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">#4 Joined</a>		<a href="#">Tao, Cynthia</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">#5 Not Joined</a>		<a href="#">Tao, Cynthia</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Export</a>	<a href="#">#6 Lapsed Members</a>		<a href="#">Tao, Cynthia</a>

### ▪ #1 Potential Member

This report provides a list of all people who have been identified in the database as a “potential member” – typically those who staff members have met and identified as being organizations that are not currently members but have 501c(3) status. This list includes also those who have attended HSC workshops potential, even if they were not coded in the database as “potential members.”

The field **Referred as Potential** indicates that they were referred as Potential Members.

Salutation	First Name	Last Name	Title	Referred Potential	Status	Direct Phone	Direct Phone Ext	Phone	Email
Company / Account: <a href="#">? (individual)</a> (1 record)									
Ms.	<a href="#">Tanya</a>	<a href="#">Brown</a>	-	<input checked="" type="checkbox"/>	OPEN	(516) 545-6031	-	(347) 285-7450	-

▪ **#3 Referrals**

List of individual that provide referral foe HSC.

Account Name	Salut .	First Name	Last Name	Title	Address	Phone	Direct Phone	Direct Phone Ext.	Mobile Phone	Fax	E-mail
<a href="#">Mutual of America</a>	Mr.	<a href="#">Dragone</a>	<a href="#">Vince</a>	VP		-	-	-	-	-	<a href="mailto:vincent.dragone@mutualofamerica.com">vincent.dragone@mutualofamerica.com</a>
<a href="#">Nonprofit Coordinating Committee of New York</a>	Mr.	<a href="#">Marvin</a>	<a href="#">Ciporen</a>	Consultant	1350 Broadway New York, NY 10018	-					

▪ **#4 Joined**

Potential Member Joined

Salut.	First Name	Last Name	Title	Status	Joined on	Phone	Direct Phone	Direct Phone Ext	E-mail	Notes
Company / Account: <a href="#">Bronx House</a> (1 record)										
Mr.	<a href="#">Howard</a>	<a href="#">Martin</a>	-	JOINED	1/18/2011	-	-	-	-	e-mails? 4/1, 4/21, 4/22, 5/14, 5/15;
Company / Account: <a href="#">Career Gear</a> (1 record)										
Mr.	<a href="#">Sanful</a>	<a href="#">John</a>	-	JOINED		-	-	-	<a href="mailto:johns@care">johns@care</a>	Signed up for our

[ergear.org](#) newsletter;  
SS  
JOINED

## ▪ #5 Not Joined

Potential Member Not Joined

Salutation	First Name	Last Name	Title	Status	Phone	Direct Phone	Direct Phone Ext	E-mail	Notes
Company / Account: <a href="#">Association for Services for the Aged</a> (1 record)									
Mr.	<a href="#">Tom</a>	<a href="#">Grogan</a>	Director of Fiscal Operations	NOT JOINING	-	(718) 707-9696	x 3101	<a href="#">thomas@afsabk.org</a>	member of JASA; received info e-mail to CB 4/7/09

## Former HSC Member Organization

## ▪ #6 Lapsed Member

Salutation	First Name	Last Name	Date of Termination	Title	Phone	Direct Phone	Direct Phone Ext.	Email	Notes
Account Name: <a href="#">Black Equity Alliance</a> (1 record)									
-	<a href="#">Rasul</a>	<a href="#">Miller</a>	-	-	-	-	-	<a href="#">rmiller@blackequityalliance.org</a>	-
Account Name: <a href="#">Bronx House</a> (1 record)									



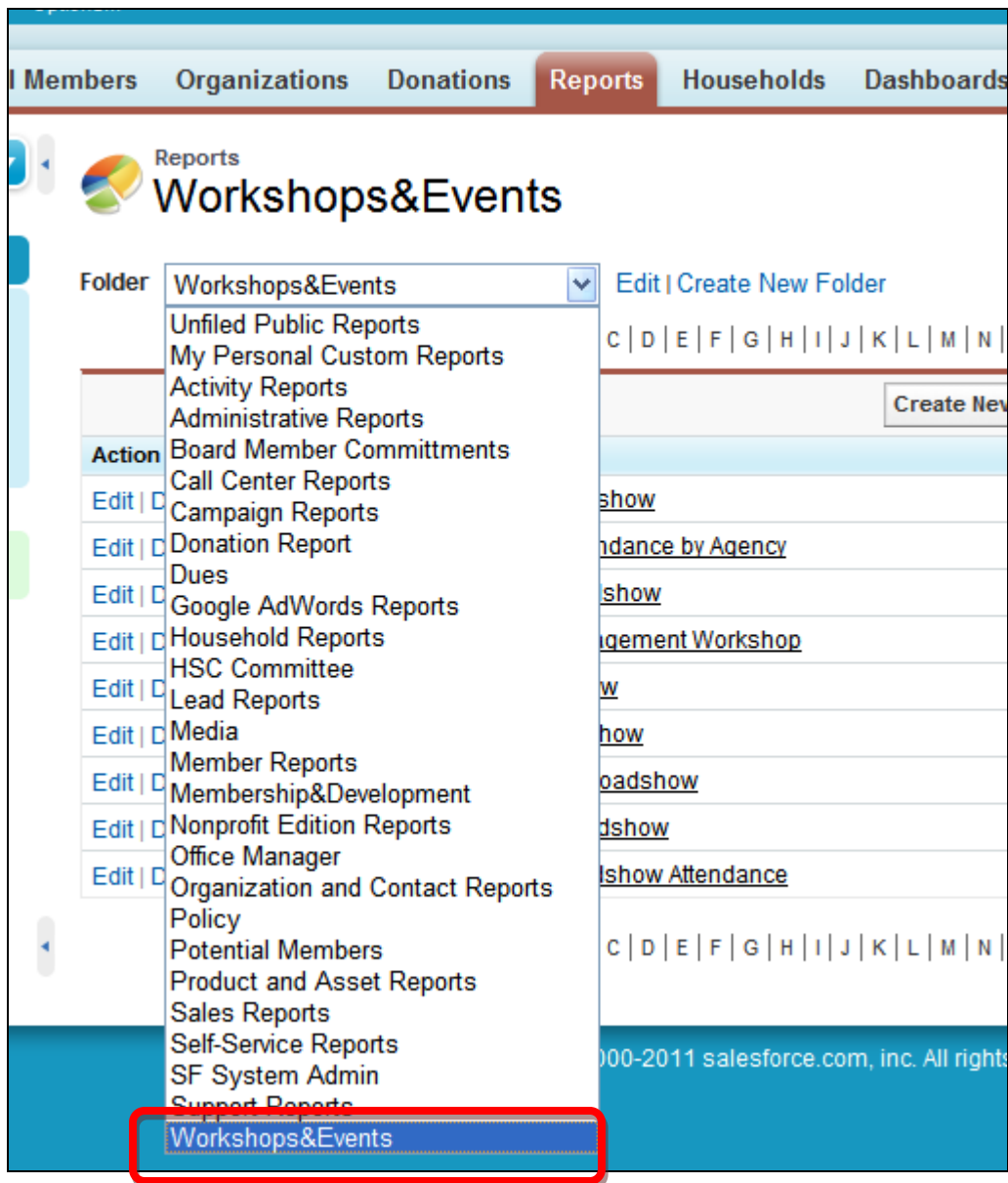
Mr.	<a href="#">Howard</a>	<a href="#">Martin</a>	-	-	-	-	-	-	-
<b>Account Name:</b> <a href="#">Connect, Inc.</a> (1 record)									
-	<a href="#">Janet</a>	<a href="#">Samuel</a>	-	-	(212)	(212)	-	<a href="#">jsamuels@</a>	-
	<a href="#">s</a>				683-	683-		<a href="#">connectnyc</a>	
					0015	0015		<a href="#">.org</a>	
<b>Account Name:</b> <a href="#">Cypress Hills Local Development Corporation</a> (2 records)									
-	<a href="#">Mich</a>	<a href="#">Neugeb</a>	-	ED	(718)	-	-	<a href="#">michellen</a>	-
	<a href="#">elle</a>	<a href="#">auer</a>			647-			<a href="#">@cypressh</a>	
					2800			<a href="#">ills.org</a>	
-	<a href="#">Emily</a>	<a href="#">Van</a>	-	Deputy	(718)	-	-	-	-
	<a href="#">Ingen</a>			Director	647-				
					2800				

## Attendees at HSC Workshops and Events

To see reports about HSC workshops and events, you can click on the down arrowhead and select **Workshop&Events**. This section describes those reports.

Many of these reports were created because there were a significant number of members who RSVPd for events that they did not ultimately attend. HSC would like to track these members in case there is a trend that certain people or organizations repeatedly are “no shows” at events with limited seating.

These reports were created for events that have already occurred and are samples for those events. To create new reports refer to Salesforce Documentation under U:\HSC\Program Areas\Membership Services\Intern Guidelines\SalesForce\Salesforce Documentation\Official SF documentation\Official SF documentation\Report



- # [Report Number] – [Workshop/Roadshow Name] (e.g. #1 – Brooklyn Roadshow)

This report tracks attendance at the HSC Roadshows held in the Summer-Fall of 2010. These roadshows were open to both HSC members and non-members.

The **Responded** and **Attended** fields track, respectively, the total number of the people that RSVPd to attend and the number of people that actually attended for each section.

The field Member Type indicates if the person is a Current HSC Member (Contact) or a Potential Member.

First Name	Last Name	Title	Member Type	Notes	Attended	# Responded	# Attended
Parent Campaign Name: <a href="#">Brooklyn Roadshow</a> (72 records)							
Campaign Name: <a href="#">Brooklyn Roadshow - Session 1</a> (36 records)							
						36	30
Company: [not provided] (1 record)							
<a href="#">Dana</a>	<a href="#">Hammond</a>	-	Potential Member	-	<input type="checkbox"/>		
Company: Asian Community United Society (1 record)							
<a href="#">Warren</a>	<a href="#">Chan</a>	Executive Director	Potential Member	-	<input checked="" type="checkbox"/>		
Company: Brooklyn Community Services (4 records)							
<a href="#">Alan D.</a>	<a href="#">Goodman</a>	Executive Director	Contact	-	<input type="checkbox"/>		
<a href="#">Ana</a>	<a href="#">Espinal</a>	Supervisor/ case coordinator	Contact	-	<input checked="" type="checkbox"/>		
<a href="#">Leslie</a>	<a href="#">Klein</a>	Director, ARS	Contact	-	<input checked="" type="checkbox"/>		
<a href="#">Marilyn</a>	<a href="#">Millien-Harris</a>	Homemaker Program Director	Contact	-	<input checked="" type="checkbox"/>		

#### ▪ #9 Workshop & Roadshow Attendance

This report is a summary of HSC member registration and attendance at all HSC Workshops/Roadshows.

	# Responded	# Attended

<b>Campaign Name:</b> <a href="#">IBM Project Management Workshop</a> (33 records)	33	13
<b>Company:</b> Aging in America Community Service (1 record)		
<b>Company:</b> Black Veterans for Social Justice (1 record)		
<b>Company:</b> BronxWorks, Inc. (2 records)		

It shows the number of employees who attended each session from each organization. This can be used to identify those organizations who are using this member benefit.

First Name	Last Name	Attended
<b>Company:</b> Agenda for Children Tomorrow (3 records)		
<b>Campaign Name:</b> <a href="#">Manhattan Roadshow 10-19-10</a> (1 record)		
<a href="#">Linda</a>	<a href="#">Selvin</a>	<input type="checkbox"/>
<b>Campaign Name:</b> <a href="#">Manhattan Roadshow 9-21-10</a> (1 record)		
<a href="#">Linda</a>	<a href="#">Selvin</a>	<input type="checkbox"/>
<b>Campaign Name:</b> <a href="#">White Ink marketing workshop 9.28.10</a> (1 record)		
<a href="#">Deborah</a>	<a href="#">Rubien</a>	<input checked="" type="checkbox"/>

## HSC Committee Reports

### ▪ #1 HSC Committee by Organization

List of HSC Committee members by Organization

	First Name	Last Name	Title	AA RG	Compensation	Contract Refor	Disaster Preparedness &	Finance/Personnel	Governance	Technology and Referral
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						m	Response			
<input type="checkbox"/>	Account Name: <a href="#">Alzheimer's Association, New York City Chapter</a> (1 record)									
	<a href="#">Eugenia</a>	<a href="#">Dorisca</a>	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Account Name: <a href="#">Asian American Federation</a> (2 records)									
	<a href="#">Hong</a>	<a href="#">Lee</a>	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<a href="#">Cao</a>	<a href="#">O</a>	Executive Director	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

▪ **#2 HSC Committee – AARG**

List of AARG HSC Committee Members

First Name	Last Name	Title
Account Name: <a href="#">Alzheimer's Association, New York City Chapter</a> (1 record)		
<a href="#">Eugenia</a>	<a href="#">Dorisca</a>	-
Account Name: <a href="#">Asian American Federation</a> (1 record)		
<a href="#">Hong</a>	<a href="#">Lee</a>	-

Under the folder HSC Committee you will also find the following report

- HSC Committee – Compensation
- HSC Committee – Contract Reform
- HSC Committee - Disaster Preparedness and Response
- HSC Committee - Finance/Personnel
- HSC Committee – Technology and Referral
- HSC Committee – Governance

## Development Reports

### ▪ Completed

This report shows the list of grants received by HSC and that have been completed. (All final reports and monies submitted/accounted for.)

Account Name	Program	Amount	Date Awarded or Expected	Notes	Date Submitted
<a href="#">Altman Foundation</a>	Disaster Preparedness & Response	\$36,887.00	12/28/2007	Applied to 2008-2009; using up previous unmatched grant	12/11/2008
<a href="#">New York Community Trust</a>	Workforce	\$50,000.00	7/1/2006	-	-
<a href="#">New York Community Trust</a>	Contracting	\$50,000.00	5/1/2007	-	-
<a href="#">New York Community Trust</a>	One New York	\$25,000.00	3/10/2009	total grant of 153K to UNH	-
<a href="#">New York Community Trust</a>	ARRA / Fed Stim Tracking	\$30,000.00	6/9/2009	Req. 75K; will do 1/2 year for 30K, 6/1/09 - 12/1/09	4/21/2009

### ▪ Foundation Contact List

This report shows a list of the foundations and corporations with whom HSC has had some contact or is interested in pursuing.

Note: To fit the Word page format, the screen below does not represent the format of the database report. The fields for each foundation run horizontally in the report, rather than vertically as shown here

<a href="#">First Name</a>	<a href="#">Account Name: Altman Foundation (4 records)</a>		<a href="#">Sonali</a>	<a href="#">Deborah Thompson</a>	<a href="#">Jane B.</a>	<a href="#">Karen L.</a>
<a href="#">Last Name</a>			<a href="#">Mukerjee</a>	<a href="#">Velazquez</a>	<a href="#">O'Connell</a>	<a href="#">Rosa</a>
<a href="#">Title</a>			Grants Manager	Sr Program Officer	President	Vice President Executive Dir
<a href="#">Notes</a>			-	-	-	-
<a href="#">Email</a>			-	<a href="mailto:dtompson@altman.org">dtompson@altman.org</a>	-	<a href="mailto:krosa@altman.org">krosa@altman.org</a>
<a href="#">Address</a>			521 Fifth Avenue 35th Floor New York, NY 10175-3599	521 Fifth Avenue 35th Floor New York, NY 10175-3599	521 Fifth Avenue 35th Floor New York, NY 10175-3599	521 Fifth Avenue 35th Floor New York, NY 10175-3599
<a href="#">Phone</a>			(212) 682-0970	(212) 682-0970	(212) 682-0970	(212) 682-0970
<a href="#">Direct Phone</a>			-	-	-	-
<a href="#">Direct Phone Ext.</a>			-	-	-	-
<a href="#">Mobile Phone</a>			-	-	-	-
<a href="#">Fax</a>			(212) 682-1648	(212) 682-1648	(212) 682-1648	(212) 682-1648
<a href="#">Member Contact</a>			-	Terry Bischoff	-	Terry Bischoff
<a href="#">Assistant</a>			-	-	-	-
<a href="#">Asst. Phone</a>			-	-	-	-
<a href="#">Asst. Email</a>			-	-	-	-
<a href="#">Website</a>			-	-	-	-
<a href="#">Notes</a>			date initial contact: 2006	date initial contact: 2006	date initial contact: 2006	date initial contact: 2006

▪ **In Process**

Grant in progress 2010/2011 (*the table has been transposed to fit the page format*)

<b>Account Name</b>	<a href="#">Altman Foundation</a>	<a href="#">Scherman Foundation, Inc.</a>
<b>Areas of Interest</b>	Disaster Preparedness & Response	environment, international peace/security, reproductive rights/services, human rights &

		liberties, arts, social welfare, civil rights
<b>Target Amount</b>	\$100,000	-
<b>Amount</b>	-	-
<b>Government Grant</b>		
<b>Notes</b>	They don't have any money right now."	NYC social welfare orgs have gotten grants for social justice, community org., community self-help; initial contact is via letter
<b>Date Initial Contact</b>	12/28/2007	-
<b>Proposal Due</b>	-	-
<b>Proposal Due (Notes)</b>	no deadline	No deadlines -- submit letter with appropriate backup material
<b>HSC Action Required</b>	Awaiting KS response to Rosa letter. MS to follow up -- ON HOLD;	-
<b>Next Target Contact Date</b>	-	
<b>Next Target Contact Date (Notes)</b>	March	
<b>Stage</b>	Pledged	

## ▪ **Prospects**

*(the table has been transposed to fit the page format)*

This report shows the complete list of foundations that HSC may be interested in working with. Some may have already been applied to (whether successfully or not) and others have been identified as possible prospects but HSC has not yet had an opportunity to work with them.

<b>Areas of Interest</b>	<b>Account Name: 21st Century Foundation (1 record)</b>		breaking down barriers
<b>Notes</b>			-
<b>Contact Name(s)</b>			-
<b>Target Amount</b>			-



<b>Target Amount (Range)</b>		\$ 20.000
<b>Notes</b>		were interested in BDB (reported 4/09) and asked to reapproach in Fall 09
<b>Date Initial Contact</b>		1/1/2009-
<b>HSC Action Required</b>		reopen lines of communication?
<b>Proposal Due</b>		1/5/2011
<b>Proposal Due (Notes)</b>		
<b>Next Target Contact Date</b>		3/6/2011-
<b>Next Target Contact Date (Notes)</b>		- _____
<b>Board/Staff Contacts with Funder</b>		Terry Bishop

## ▪ **Rejected Grants**

This report shows the list of foundations (and the individual grants) that HSC applied for, but did not receive.

Program	Contact Name(s)	Annual Grant Amount (Reqstd.)	Annual Grant Amount (Reqstd.) Notes	Notes	Date Rejected	Date Rejected (Notes)	Date Submitted	Date Submitted (Notes)	Follow up Date	Follow up Dates (Notes)	Follow up	Board /Staff Contacts with Funder	HSC Action Required
Account Name: <a href="#">Altman Foundation</a> (1 record)													
Survey & Media	Karen Rosa	\$30,000	-	Sent media LOI via hard copy 5/24/10.	6/25/2010	-	12/28/2007	-	-	-	-	T Bischoff, K Sullivan	Awaiting KS response to Rosa letter. MS to follow up

## Reference Section

This section contains reference material associated with the Office Manager and Membership and Development roles/tasks when using the Salesforce database. Further details can be found in the [Salesforce documentation](#).

In particular, it provides definitions and, in some cases, maximum field lengths for the identified fields in this section.

### ***Object Fields***

Object fields are records in the Database that contain the data you enter for your Object (e.g. Organization, Contact, and Potential Member). For Example Website is an Object field for the Object Organization; Title is an Object field for the Object Contact.

### **Organization Fields**

An Organization has the following fields listed in alphabetical order

#### **Salesforce.com Field**

Field	Description
Account Name	Name of company. Up to 255 characters are allowed in this field.
Account Record Type	Name of the field that determines what fields are available for the record.
Billing Street	Street address used for billing. Up to 255 characters are allowed in this field.
Billing City	City portion of billing address. Up to 40 characters are allowed in this field.
Billing State/Province	State or province portion of billing address. Up to 20 characters are allowed in this field.
Billing Zip/Postal Code	Zip or postal code portion of billing address. Up to 20 characters are allowed in this field.
Billing Country	Country portion of billing address. Up to 40 characters are allowed in this field.
Created By	User who created the Organization
Employees	Number of people employed by the account.

Field	Description
Fax	Fax number. Up to 40 characters are allowed in this field.
Mail	Organization general E-mail e.g. info@earthlink.com
Modified By	User who last changed the account fields, including modification date and time. This does not track changes made to any of the related list items on the account. (Read only)
Notes	User Notes regarding the Organization
Parent Account	Parent company for companies that are subsidiaries of a larger company or organization. The parent account must be an existing account in Salesforce.com. You can enter the account name, or select (or optionally, create) the account using the lookup icon.
Partner Account	Read-only field that The field indicates whether an account is a partner account.
Phone	Primary phone number of account. Up to 40 characters are allowed in this field.
Type	Type of account, for example, Coalition, Federation, or Provider. Entry is selected from a <u>custom</u> picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Website	URL of account's website, for example, www.acme.com. Up to 255 characters are allowed in this field; only the first 50 are displayed.

### **Custom Field**

Field	Description
Acronym	Organization Acronym
Address Notes	Additional user Notes regarding the Organization's Address
Affiliation Date	The Date the Organization became an HSC Member
Annual Operating Expense Budget Range	The Organization's Annual Operating Expense Budget reported in the Membership Form
Annual Operating Expenses Budget Actual	The Organization's Actual Operating Budget.
City/State Government Agency	Government Agency with which The Organization has contract or Collaboration
Client Served Annually	The number of Client the Organization Served Annually
Committee Membership	Check this box if the Organization is participating on Committee

Field	Description
	Meeting
Contact/Collaboration	Text field to explain which type of Contract or Collaboration the Organization has with Government Agency
Contract Consulting	Check this box if the Organization is using HSC Contract Consulting service
Current Founder	Checkbox that The field indicates if the Organization is a current founder
Date of Rejoin	The Date the Organization rejoined as HSC Member
Date of Termination	The Date the Organization terminated its HSC Membership
Descr. Note	Additional User Notes
Discounts on Trainings	Check this box if the Organization is attending Discounted Training
District	District in where the Organization is located
Dues	Dues Category as reported in the Organization's Membership Form
Facebook	Organization Facebook account
Free/Discounted Workshops	Check this box if the Organization is attending Free or Discounted Workshop
Full Membership	Check box that The field indicates if the Organization has a Full Membership
Funding Level	The type of Funding (e.g. Federal, Multi-State, NYS) the organization has
Government Contact Opportunities	Check this box if the Organization is having Government Contact provided by HSC
HSC ID	HSC website ID
HSC Password	HSC website Password
HSC Committee	Indicates if the contact is a member of HSC Committee
Membership Status	Checkbox that The field indicates if the Organization is a current HSC Member or a Former Member
Mission Statement	The Organization's Mission Statement
MOA	Check this box if the Organization is currently using MOA discount
National Affiliate	Text field to explain if the Organization has a National Affiliation
New	Check box that The field indicates if the Organization is a new member

Field	Description
Other Area of Concern	The Organization's Other Area of Concern as reported in the Membership Form
Other Purpose	The Organization's Other Purpose as reported in the Membership Form
Permanent Board Member	Checkbox that The field indicates if the Organization has its Executive Director as Permanent Board Member
Primary Area of Concern	The Organization's Primary Area of Concern as reported in the Membership Form
Primary Purpose	The Organization's Primary Purpose as reported in the Membership Form
Reason to Terminate	The reason the Organization decided to terminate its HSC Membership
Rejoined	Check box that The field indicates if the Organization is a former member that rejoined
Section	The Organization's Section (e.g. 501(c) 3 )
Type of Organization	Field Created to fit the value on the POLICY DATABASE under the field TYPE OF ORGANIZATION
Twitter	Organization Twitter account
User Notes	Additional User Notes
White Ink/ Stylistic Press	Check this box if the Organization is currently using White Ink/ Stylistic Press services

## ***Contact Fields***

A Contact has the following fields listed in alphabetical order

### **Salesforce.com Fields**

Field	Description
Account Name	Name of account that contact is linked to. You can enter the account name, or select the account using the lookup icon. Private contacts are those that do not have an account.
Alternate E-mail	Additional e-mail
Assistant	Name of the Administrative Assistant. Up to 40 characters are allowed in this

Field	Description
	field. Filed visible for Record Type = Other; Vendor, Government Representative; Default Contact.
Asst. Phone	Assistant's phone number. Up to 40 characters are allowed in this field. Filed visible for Record Type = Other; Vendor; Government Representative; Default Contact
Birthdate	Birthday. You can enter a date, or choose a date from the calendar that displays when you put your cursor in the field. Visible for Record Type = Default Contact, Vendor
Contact Owner	Assigned owner of contact.
Contact Record Type	Name of the field that determines what picklist values are available for the record.
Created By	User who created the contact including creation date and time. (Read only)
Do Not Call	The field indicates if the person does not want to be contacted via telephone.
E-mail	E-mail address. Must be a valid e-mail address in the form: jsmith@acme.com. Up to 80 characters are allowed in this field.  Click the e-mail address in this field to send an e-mail using your personal e-mail application. This type of e-mail is not logged as an activity on the contact record.  If the Gmail Buttons and Links feature is enabled, you can click the Gmail link next to the field to send an e-mail from your Gmail account. See Using Gmail in Salesforce.com for more information.
E-mail Opt Out	The person's e-mail address will not be included in mass e-mails.
Fax	Contact's fax number. Up to 40 characters are allowed in this field.
Fax Opt Out	The field indicates if the person has requested not to be included in broadcast faxes.
First Name	First name of the contact, as displayed on the contact edit page. Up to 40 characters are allowed in this field.
Household	Person's household. Family or domestic unit the Contact belong to.
Home Address	Person's home address, including street, city and state.

Field	Description
	For Record Type = Default Contact.
Home Phone	Person's home phone number. Up to 40 characters are allowed in this field. For Record Type = Default Contact.
Last Name	Last name of the contact, as displayed on the contact edit page. Up to 80 characters are allowed in this field.
Secondary Address Type	Work; Other; Legislative office For Record Type: Default Contact; Government Rep.
Secondary Address Type	Work; Other; Legislative office For Record Type: Default Contact; Government Rep.
Secondary Street	Secondary Street mailing address. Up to 255 characters are allowed in this field.
Secondary City	Secondary City portion of mailing address. Up to 40 characters are allowed in this field.
Secondary State/Province	Secondary State or province portion of mailing address. Up to 20 characters are allowed in this field.
Secondary Zip/Postal Code	Secondary Zip or postal code portion of mailing address. Up to 20 characters are allowed in this field.
Secondary Country	Secondary Country portion of mailing address. Up to 40 characters are allowed in this field.
Primary Address Type	Work; Other; Legislative office For Record Type: Default Contact; Government Rep
Primary Street	Primary Street mailing address. Up to 255 characters are allowed in this field.
Primary City	Primary City portion of mailing address. Up to 40 characters are allowed in this field.
Primary State/Province	Primary State or province portion of mailing address. Up to 20 characters are allowed in this field.
Primary Zip/Postal Code	Primary Zip or postal code portion of mailing address. Up to 20 characters are allowed in this field.
Primary Country	Primary Country portion of mailing address. Up to 40 characters are allowed in this field.
Mobile	Cellular or mobile phone number. Up to 40 characters are allowed in this field. For Record Type = Default Contact



Field	Description
Modified By	User who last changed the contact fields, including modification date and time. This does not track changes made to any of the related list items on the contact. (Read only)
Name	Combined first and last name of contact, as displayed on the contact detail page.
Other Phone	Additional phone number listing. Up to 40 characters are allowed in this field.
Phone	Contact's primary phone number. Up to 40 characters are allowed in this field.
Salutation	Title for addressing the person, for example, Mr., Ms., Dr., or Prof. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Title	Person's position within his or her organization. Up to 80 characters are allowed in this field.
Work Phone	Person's Work Phone.
Work Phone Ext.	Person's Work Phone Extension.
Household Phone	Person's household Phone.
Work E-mail	Person's work E-mail.
Personal E-mail	Person's personal E-mail.
Household Address	Person's household Address (Read Only).

### **Custom Fields**

Field	Description
Suffix	Person's Name Suffix (e. g. Jr.)
Nickname	Person's preferred nickname
Academic Title	Person's Academic Title (e.g. Ph. D.)
AARG	Checkbox. The field indicates if the person is a member of the AARG Committee.
Agency Representative	Checkbox. The field indicates that the person is the designated Agency Representative.
Assistant E-mail	Assistant's e-mail. Field visible for Record Type = Other; Vendor; Government.

Field	Description
	Representative; Default Contact.
Audit	Checkbox. The field indicates if the person is a member of the Audit Committee.
Board Member	Checkbox. The field indicates if the person is a member of the HSC Board of Directors.
Board End Date	Date when the person left the HSC Board.
Board Membership	Elected; Standing ; Appointed.
Board notes	Additional Notes.
Board Start Date	Date when the person became a member of the HSC Board.
Budget Advocacy	Checkbox. The field indicates if the person is a member of the Budget Advocacy Committee.
Co-Chair	Checkbox. The field indicates if the Person is a Co-Chair of a Committee.
Committee Chair	Check box. The field indicates if the Person is a committee chair. Record Type : Government Rep.
Committee Chair Title	Person's Committee Chair Title. Record Type : Government Rep.
Compensation	Checkbox. The field indicates if the person has a decision on HSC Staff Compensation.
Contract Reform	Checkbox. The field indicates if the person is a member of the Contract Reform Committee.
Direct Phone	Person's Direct Phone number.
Direct Phone Ext	Person's Direct Phone Extension if applicable.
Disaster Preparedness & Response	Checkbox. The field indicates if the person is a member of the Disaster Preparedness & Response Committee.
District	Pick-list to indicate the legislative district. Record Type: Government Representative.
District Fax	Government Representative's District fax, Record Type: Government Representative.
District Number	Government Representative's District number, Record Type: Government Representative.
District Phone	Government Representative's District phone.

Field	Description
	Record Type: Government Representative.
Executive Committee	Checkbox. The field indicates if the Contact is a member of the Executive Committee
Executive Committee End Date	Date when the person left the Executive Committee.
Executive Committee Start Date	Date when the person became a member of the Executive Committee.
Executive Director	Checkbox. The field indicates if the Person is the Executive Director of his/her Organization.
Finance/Personnel	Checkbox. Checkbox. The field indicates if the Person is a member of the Finance/Personnel Committee.
Financial Rep	If Checked The field indicates the person is the Financial rep of her/his Organization.
Governance	Checkbox. The field indicates if the Person is a member of the Governance Committee.
How HSC got information	Notes about how HSC got information related to a Media Contact Record Type: Media Contact
HSC Committee Start Date	Date when the Person become a member of the HSC Executive.
HSC Committee End Date	Date when the Person quit as a member of the HSC Committee.
Legislative Fax	Person's legislative Fax (e.g. City Hall Fax) number
Membership & Development	If checked this field indicates that the person is a member of the Membership & Development Committee.
Officer	Checkbox. If checked the Person is an HSC Board Officer.
Officer Title	Person's title as a Board Officer (e.g. Chair; Secretary).
Legislative Phone	Person's Legislative Phone (e.g. City Hall Phone) number. Record Type : Government Representative.
Past Board Chair	Checkbox that indicates if the person was an HSC Board Chair.
Past Honoree	Checkbox. The field indicates if the person is an HSC Past Honoree at the LAR.
Legislative Leader	Checkbox. Indicates if the person is a Legislative Leader.

Field	Description
Michael List	The person is on Michael's Friend List
Newsletter	Checkbox. Checked if the person has subscribed the newsletter
Notes	User Notes
NYC vs. NYS focused	Checkbox. The field indicated if the person (as media contact) is focused on NYC or NYS. Record Type: Media Contact.
Policy Advocacy	Checkbox. The field indicated if the person is the policy/advocacy referent for his/her Organization.
Referral	Checkbox. The field indicates if the Person is a Referral for HSC.
Referred by (Contact)	Referral (Person).
Referred by (Organization)	Referral Organization.
Referred by (Text)	Text field used to track the original excel information. The previous fields Referred by (Contact) and Referred by (Organization) are also links to the Contact/Organization. The field Referred by (Text) is a text field.
Status	Current Member/Former Member.
Sub Committee Chair Title	Person's Committee Chair Title. Record Type : Government Rep
Technology and Referral	Checkbox. The field indicates if the Person is a member of the Technology and Referral Committee.
User Notes	Additional User notes.
Vacant	Checkbox. The field indicates if the position as Government Representative is Vacant. Report Type: Government Representative.

## ***Potential Member Fields***

### **Salesforce.com Fields**

Field	Description
Address	Street address for the lead, for example, 475 Boardwalk Ave. Up to

Field	Description
	255 characters are allowed in this field.
City	City portion of the lead's address, for example, San Francisco. Up to 40 characters are allowed in this field.
Company	Name of company with which lead is affiliated. Up to 255 characters are allowed in this field.
Country	Country portion of the lead's address. Up to 40 characters are allowed in this field.
Created By	User who created the lead, including creation date and time. (Read only).
Do Not Call	Indicates if the lead does not want to be contacted via telephone.
E-mail	E-mail address of lead. Must be a valid e-mail address in the form: jsmith@acme.com. Up to 80 characters are allowed in this field. Click the e-mail address in this field to send an e-mail using your personal e-mail application. If the Gmail Buttons and Links feature is enabled, you can click the Gmail link next to the field to send an e-mail from your Gmail account. See Using Gmail in Salesforce for more information.
E-mail Opt Out	Lead will not be included in mass e-mails.
Fax	Lead's fax number. Up to 40 characters are allowed in this field.
Fax Opt Out	Lead has requested not to be included in broadcast faxes.
First Name	First name of the lead, as displayed on the lead edit page. Up to 40 characters are allowed in this field.
Last Name	Last name of the lead, as displayed on the lead edit page. Up to 80 characters are allowed in this field.
Lead Status	Status of the lead, for example, Open, Contacted, Qualified. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Mobile	Cellular or mobile phone number. Up to 40 characters are allowed in this field.
Modified By	User who last changed the lead fields, including modification date and time. This does not track changes made to any of the related list items on the lead. (Read only)

Field	Description
Name	Combined first and last name of lead, as displayed on lead detail page.
No. of Employees	Number of employees at the lead's company.
Phone	Lead's primary phone number. Up to 40 characters are allowed in this field.
Salutation	Title for addressing the lead, for example, Mr., Ms., Dr., or Prof. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
State	State or province portion of the lead's address. Up to 20 characters are allowed in this field.
Title	Position of lead within his or her company. Up to 80 characters are allowed in this field.
Website	URL of company's website, for example, www.acme.com. Up to 255 characters are allowed in this field; only the first 50 are displayed.
Zip	Zip code or postal code portion of the lead's address. Up to 20 characters are allowed in this field.

### **Custom Fields**

Field	Description
Acronym	Organization's Acronym.
Address Notes	User notes regarding Potential Member's address.
Agency Rep	The box checked indicates if the Potential Member is the Agency Representative.
Alternative E-mail	Potential Member's alternative e-mail.
Direct Phone	Potential Member's Direct Phone.
Direct Phone Ext.	Potential Member's Direct Phone Extension.
Executive Director	Check the box if the Potential Member is the Executive Director of her/his Organization

Field	Description
Facebook	Potential Member's Facebook Account
Joined on	Date Potential members joined HSC..
Notes	User notes.
Referred by (Contact)	Contact that referred the Potential Member.
Referred by (Organization)	Organization which referred the Potential Member.
Referred Potential	Check the box if the Potential Member was referred by a Contact or an Organization as a potential member.
Status	Open, Joined, Not Joined.
Suffix	Potential Member's Suffix (e.g. Jr.).
To Do	Text field – activities to do such as send an e-mail or call to follow up.
Twitter	Potential Member's Twitter Account.
User Notes	Additional Notes.

## ***Donation Fields***

### **Salesforce Fields**

Field	Description
Account Name	Name of Organization that donation is linked to. You can enter the Organization name, or select the account using the lookup icon.
Amount	Total donation amount.
Close Date	Date when donation was received. As the field is mandatory, if the donation has not been received yes, update the field with the data of you last update.
Created By	User who created the donation including creation date and time. (Read only).
Description	Description of the donation. Up to 32KB of data are allowed. Only the first 255 characters display in reports.

Modified By	User who last changed the donation fields, including modification date and time. This does not track changes made to any of the related list items on the donation. (Read only)
Next Step	Description of next task in closing the donation. Up to 255 characters are allowed in this field.
Donation Name	Name of the donation, for example, Acme.com - Office Equipment Order. Up to 120 characters are allowed in this field.
Donation Record Type	Name of the field that determines what picklist values are available for the record..
Primary Campaign Source	<p>Name of the campaign responsible for generating the donation.</p> <p>When you click the lookup icon for the empty field, the dialog shows the first 100 active campaigns. Enter search terms to find other records.</p> <p>For opportunities created during lead conversion, this field is automatically filled in with the campaign name from the lead. If the lead has multiple associated campaigns, the campaign with the most recently updated member status is inserted into the donation.</p> <p>For opportunities with multiple influential campaigns, click <b>Edit</b> next the primary campaign in the Campaign Influence related list on the donation detail page and select the Primary Campaign Source checkbox. The campaign will display in the Primary Campaign Source field on the donation.</p>
Probability	Percentage of estimated confidence in closing the donation.
Notes	User's notes
Stage	<p>Current stage of donation based on selections you make from a predefined list, for example, Prospect or Proposal. Entry is selected from a picklist of up to 100 available values, which are set by an administrator. Each picklist value can have up to 40 characters.</p> <p>Your administrator correlates the values in this picklist with Forecast Category values that determine how the donation contributes to your forecast.</p> <p>When you set an open donation's Stage to a type of "Closed/Won," the Close Date is set to the current date.</p>



### **Custom Fields**

<b>Field</b>	<b>Description</b>
#Tickets	Number of LAR tickets purchased.
Adds/Tickets(Notes)	User notes.
Amount Owed	Amount owed.
Amount Paid	Amount that the donor already paid .
Balance	Total amount owed – amount paid .
COMP	Check the box if tickets (or part of them) are given for free .
Contribution	Amount of the contribution (if any).
Discount	Discount amount .
Grant Total	Total Ticket Amount + Placement Amount + Package Amount + Contribution + Partial Ad + Other. Used only for L.A.R.
Journal Package	Dropdown list. Type of Journal Package.
Journal Placement	Dropdown list. Type of Journal Placement.
Other	Amount of other type of donation (if any).
Package Amount	Dropdown list. Package Amount that matches the journal package.
Partial Ad	The amount of Partial Ad purchased by the donor (if any).
Placement Amount	Dropdown list. Placement Amount that matches the placement amount.
Potential Member	Name of potential member that donation is linked to. You can enter the name, or select the potential member using the lookup icon.
Single Tickets Amount	Amount of a single LAR ticket
Total Ticket Amount	Total ticket amount (Single Tickets Amount * #Tickets)

### **Custom Fields for Grants**

<b>Field</b>	<b>Description</b>
Government Grant	If checked the Grant is a Government Grant.
Proposal Due	Due Date for the grant's proposal.

Proposal Due (Notes)	Additional notes about the proposal due date or content.
Date Submitted	Date of proposal submission.
Date Submitted (Notes)	Addition notes about the date of submission of the proposal.
Date Awarded or Expected	Date awarded or expected award date for the Grant.
Date Expected (Notes)	Additional notes about the expected date.
Date Awarded (Notes)	Additional notes about the awarded date.
Target Amount	Proposal target amount (e.g. \$10.000 or \$100.000).
Target amount (Range)	Proposal target amount (e.g. 1K-2K).
Annual Grant Amount (Requested)	Annual amount requested.
Annual Grant Amount Notes (Requested)	Additional notes about annual grant amount.
Date Rejected	Date of grant rejection (if any).
Date Rejected (Notes)	Additional notes about grant's rejection
Next Target Contact Date	Next scheduled date for contacting the Foundation/Corporation.
Next Target Contact Date (Notes)	Additional notes about the next contact.
HSC Action Required	HSC staff action required.

Contact Name(s)	List of the Foundation/Corporations' names related to a specific Grant request (note: different grants related to the same Foundation/Corporation may have different Contact names).
Action Owner	Name of the person responsible for the next action.
Follow up	Next Follow up with the Foundation/Corporation.
Follow up date	Due date for the next follow up with the Foundation/Corporation.
Follow up Dates (Notes)	Addition notes about the follow up date.

## ***Campaign Fields***

### **Salesforce Fields**

<b>Field</b>	<b>Description</b>
Active	Checkbox to mark whether the campaign is active or not. You can only choose active campaigns in the Campaign History list and other campaign picklists.
Actual Cost	Amount of money spent to run the campaign.
Budgeted Cost	Amount of money budgeted for the campaign.
Campaign Name	Identifying name for the campaign.
Converted Potential Members	Number of potential members that were converted to members due to the marketing efforts in the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. For more information on converting leads, see Converting Leads. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Created By	User who created the campaign including creation date and time. (Read only)
Description	Description of the campaign. Up to 32KB of data are allowed in this field. Only the first 255 characters display in reports.

Field	Description
End Date	Ending date for the campaign. Responses received after this date are still counted.
Expected Response (%)	Percentage of responses you expect to receive for the campaign.
Expected Revenue	Amount of money you expect to generate from the campaign.
Last Modified By	User who last changed the campaign fields, including modification date and time. This does not track changes made to any of the related list items on the campaign. (Read only)
Num Total Donation	Calculated field for number of donations associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Num Sent	Number of individuals targeted by the campaign. For example, the number of e-mails sent.
Num Won Donation	Calculated field for number of closed/won donation associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Parent Campaign	The campaign above the selected campaign in the campaign hierarchy.
Start Date	Starting date for the campaign.
Status	Status of the campaign, for example, Planned, In Progress. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Total Contacts	Number of individuals on accounts that are associated with the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or

Field	Description
	approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Potential Members	Number of potential members associated with the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Responses	Calculated field for the total number of contacts and unconverted leads that have a Member Status equivalent to “Responded” for the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Value Donation	Calculated field for the amount of all donations associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.

### **Custom Fields**

Field	Description
Period	Dropdown list. Fiscal Year Start – Fiscal Year End (e.g. 2009-2010).
Due dates	Last date the dues should be paid.
First Arrears Notice Date	Date to send the first arrears.
Second Arrears Notice Date	Date to send the second arrears notice.
Final Arrears Notice Date	Date to send the final arrears notice.

