HSC Salesforce.com

User Manual

Office Manager /Communications, Membership and Development

Modified By	Date	Description
Paola la Zazzera	22 March, 2011	Added paragraph **Donation** Added **Report** description under **Members Reports** - Brooklyn Service Site - Brooklyn Service Site – List - Brooklyn Service Site (Org In BR) Board - Brooklyn based Organization

HSC Human Services Council

The Voice of the Human Services Community

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

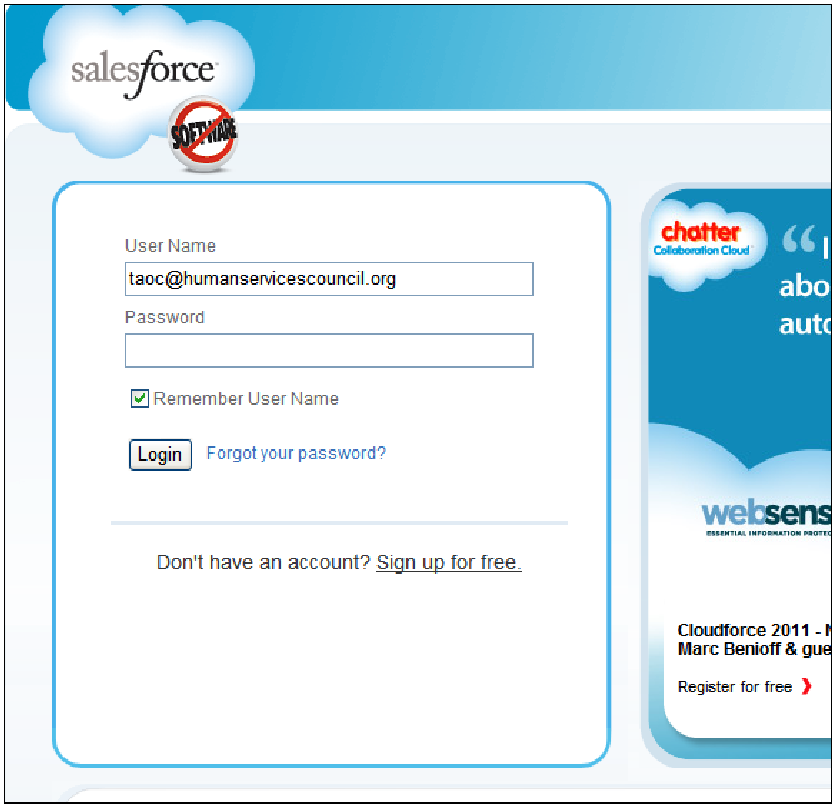
Office Manager Profile

Username:

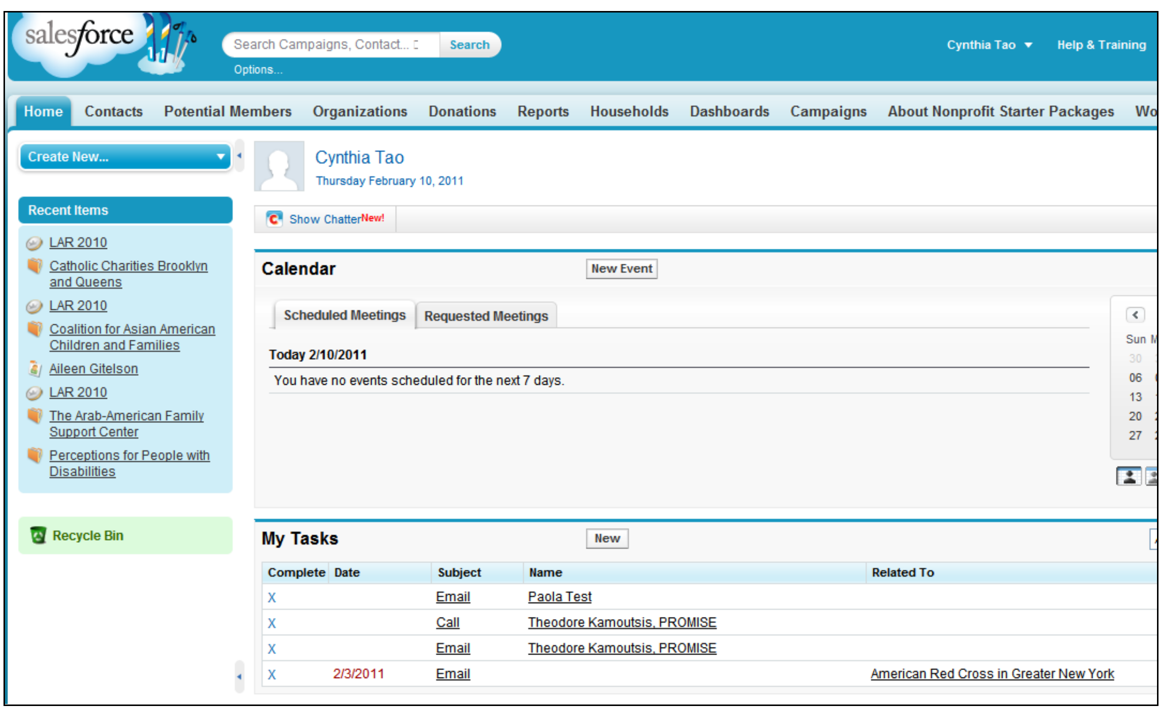
Password:

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.



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



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.

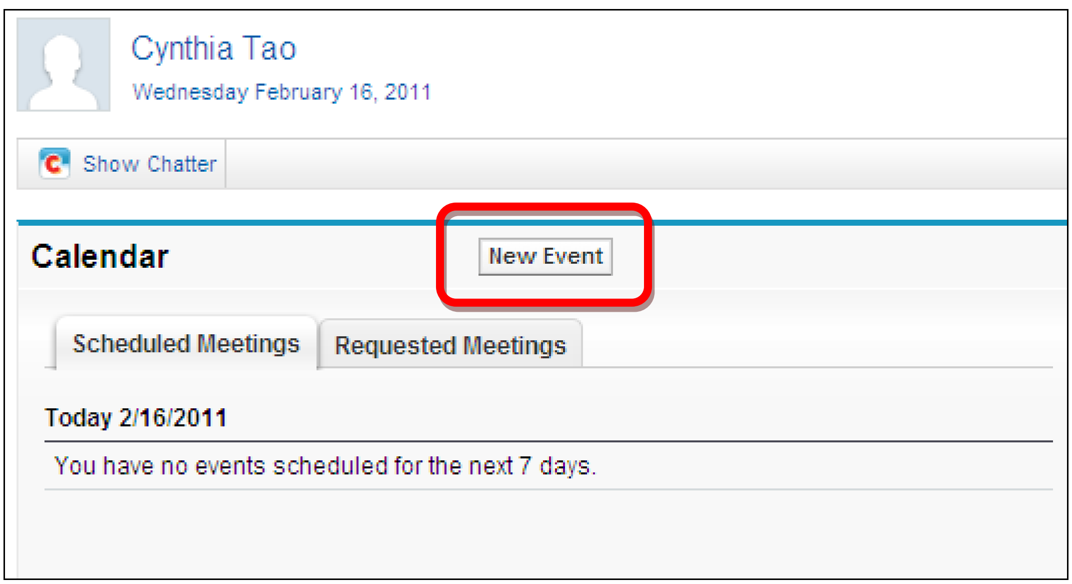
Using the **Recurrence** section you can create daily, weekly, monthly or yearly recurrent events.

Click **X** to close a task.

Using the Calendar Section

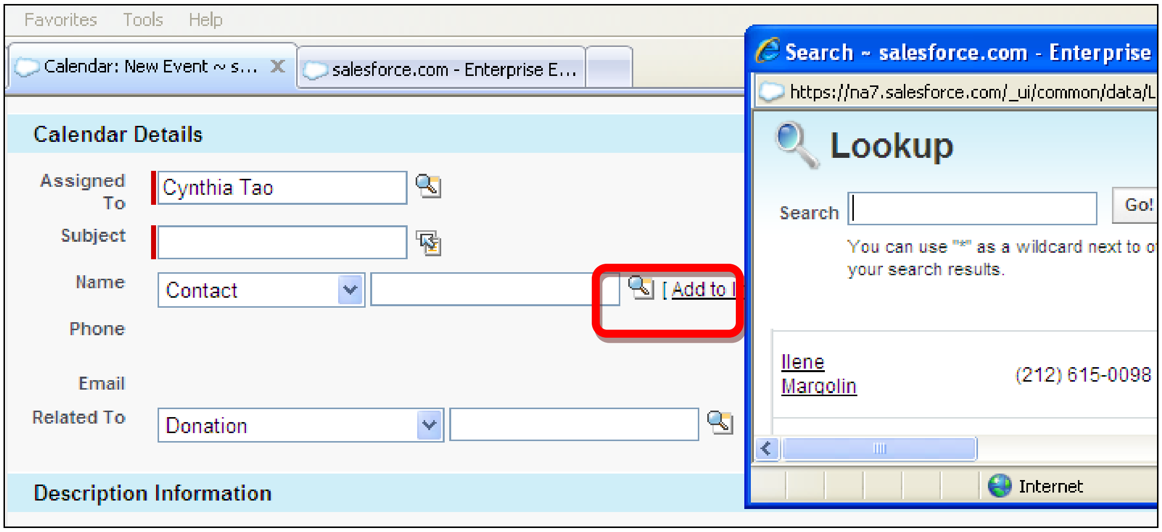
An **Event** is a Salesforce.com object used to schedule a series of activities such as Meeting, Call or E-mail. When creating an Event, you can add multiple Invitees.

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

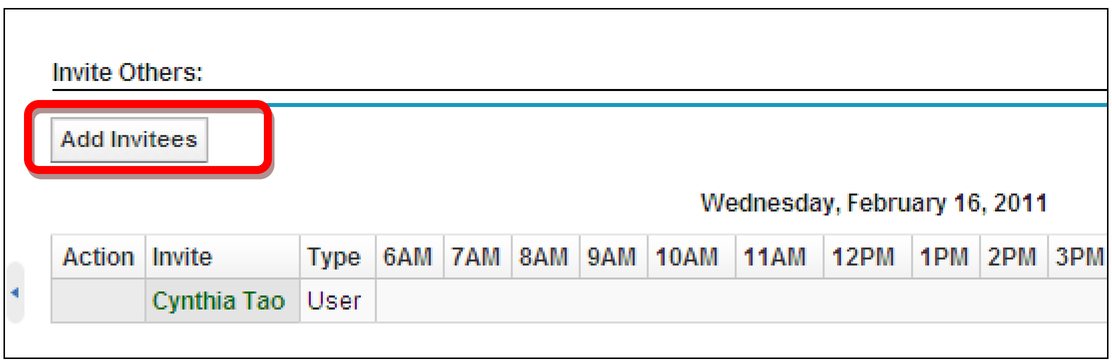


Enter the details of the event such as subject, start date and time, and end date and time.

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



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



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

Office Manager Profile

Username:

Password:

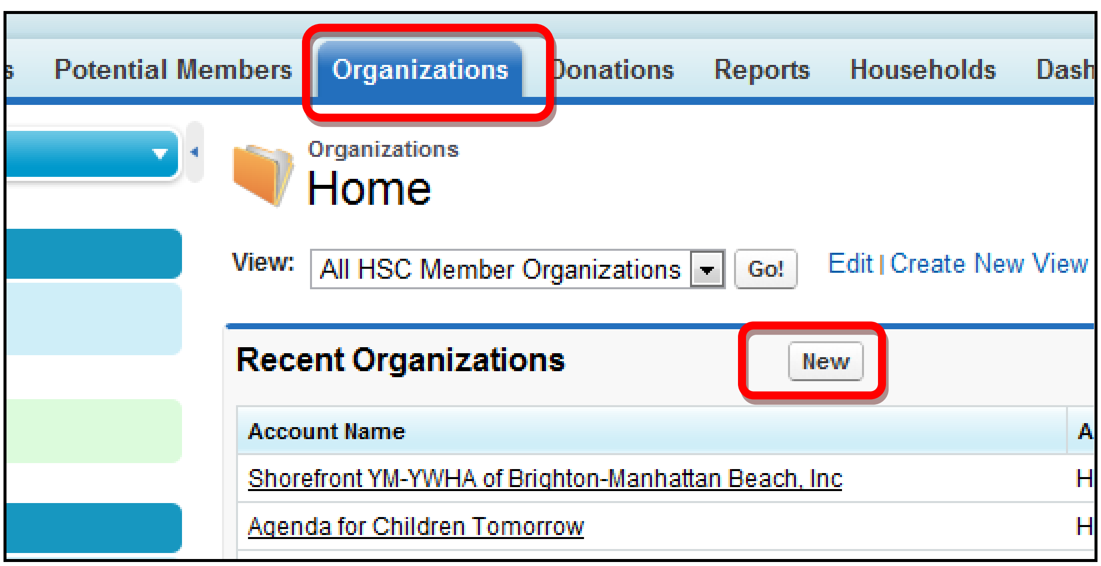
How to Create or Update an Organization

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

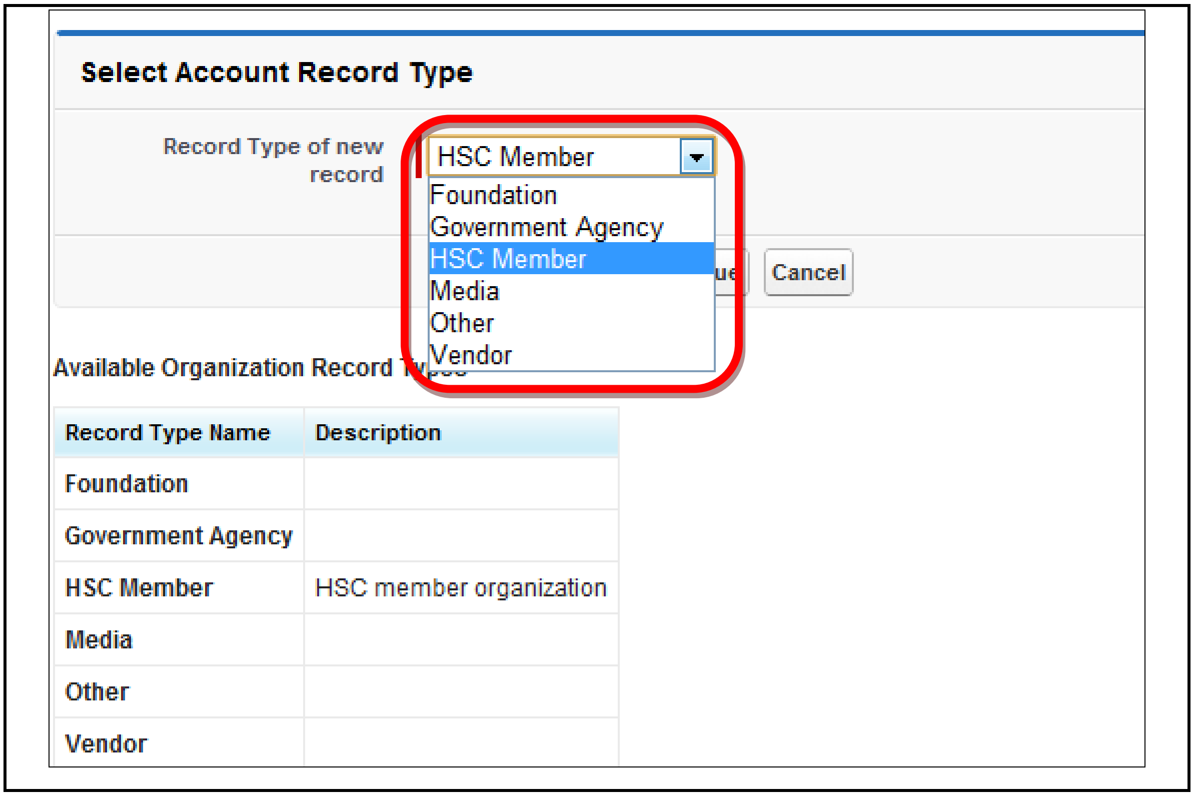
- HSC Member
- Foundation
- Government Agency
- Media Contact
- Vendor

Create New Organization

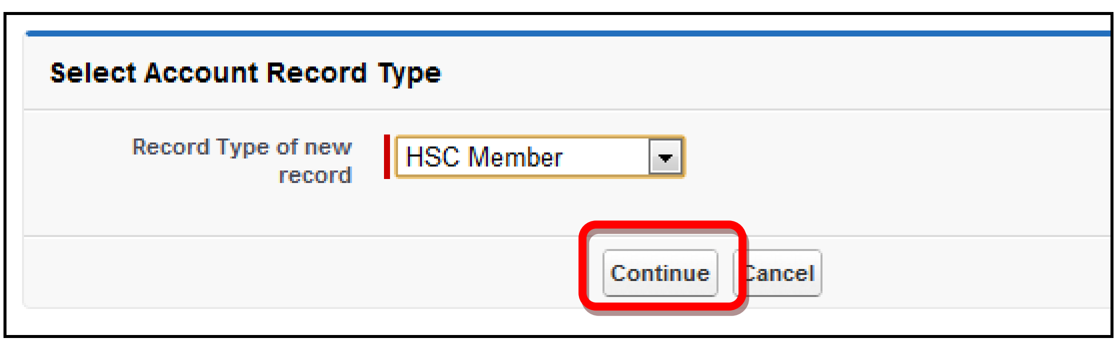
To create a new Organization, click on the **Organizations** tab, and click **New**.



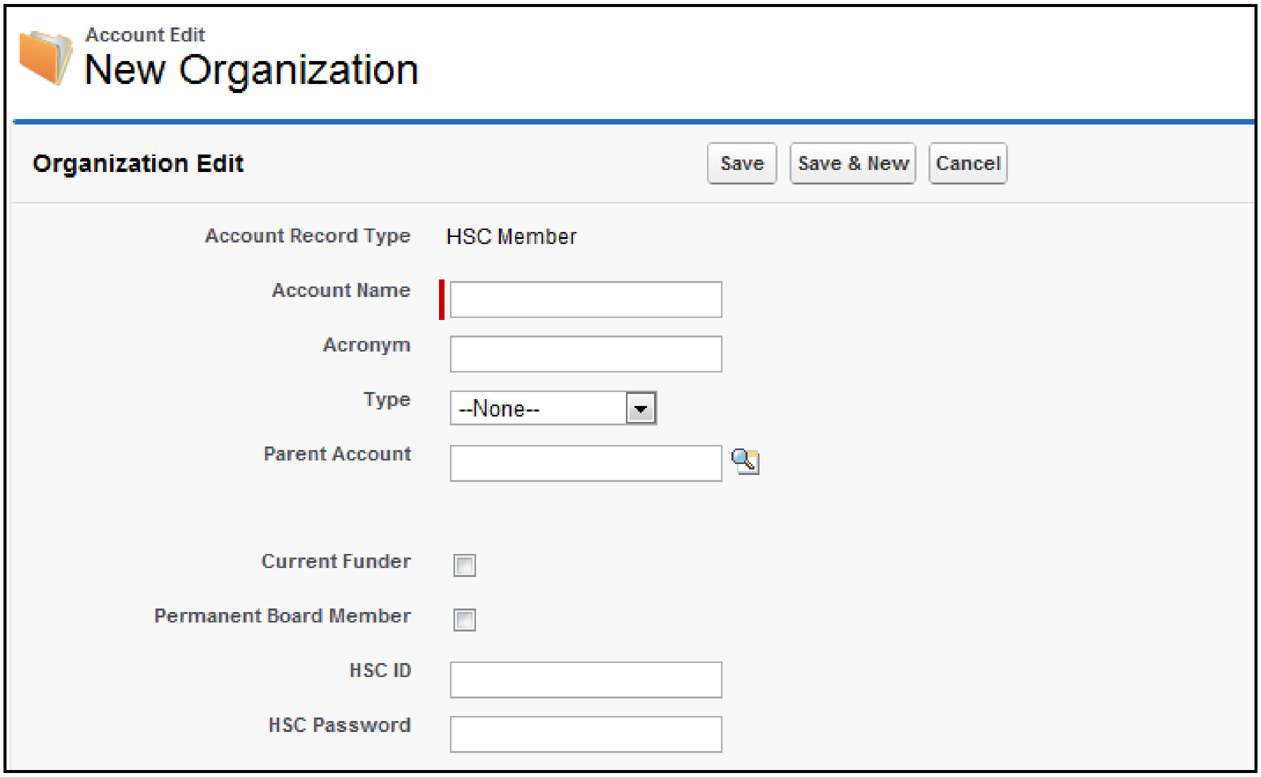
Select the appropriate **Record Type** from the drop-down list **Record Type of new record**. Each Record Type will display a different set of detail fields, depending on which record type you select.



Click **Continue.**



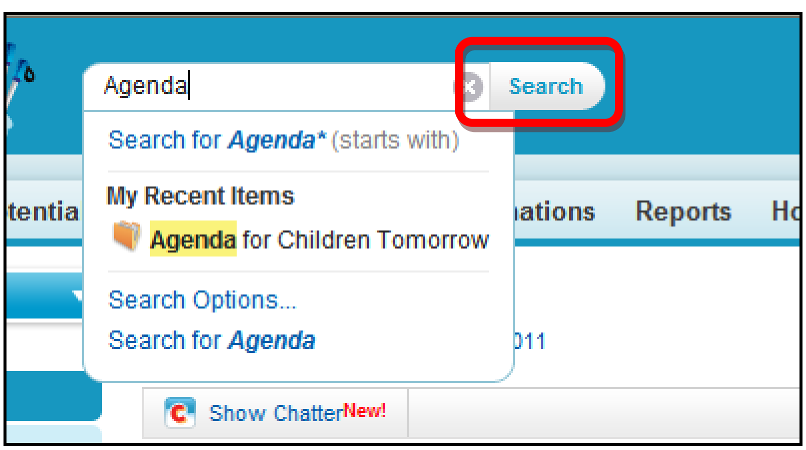
Fill in the Organization's details in the appropriate fields. Some fields are marked with a question mark (?) next to the field name; you can click on this button to get help about that field.



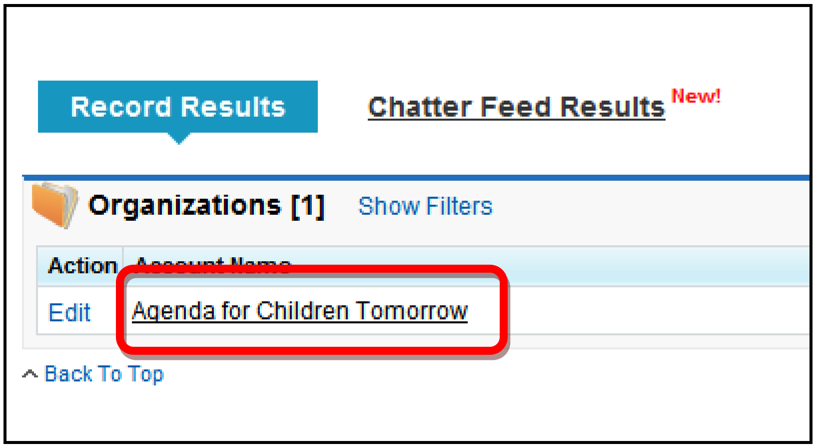
Click Save.

Update an existing HSC Member Organization

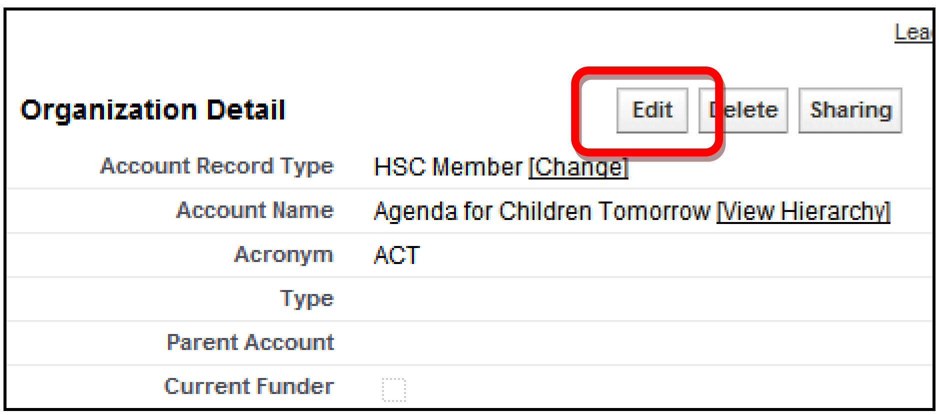
To update an existing **Organization,** use the **Search** box. Type in the Organization name and click **Search.** You can also just type in the first few letters or the organization's acronym and search results will appear that match what you typed.



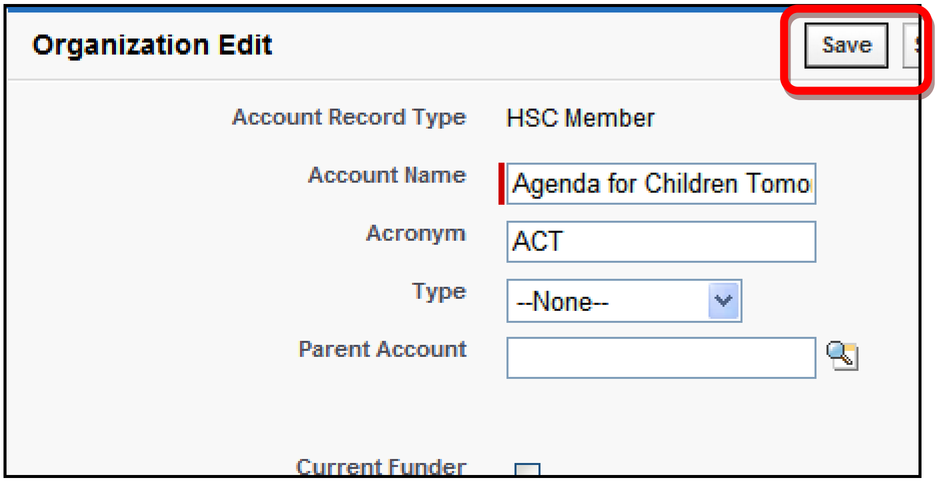
Click on the Organization name from the search results.



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
Current Funder

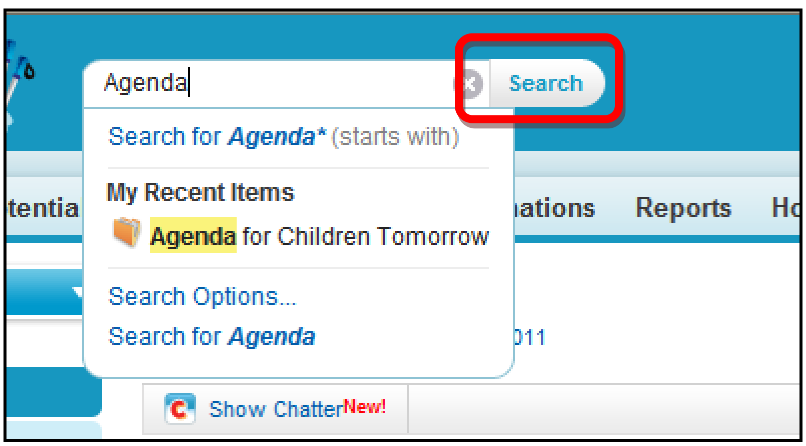
How to Create or Update an HSC Member Contact

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.

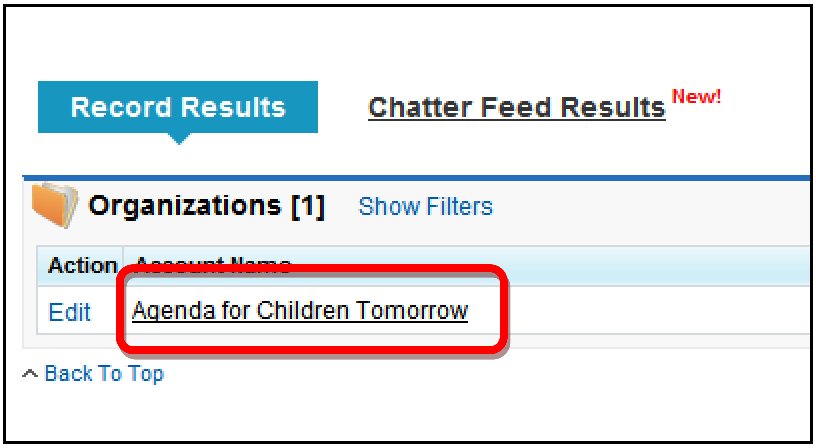
If you want to associate a contact with an organization, for example, if there is a new Executive Director that you want to add to the database, you would want to create the new contact from the **Organizations Tab** (https://na11.salesforce.com/001/o). If you want to add a new contact that may not be 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

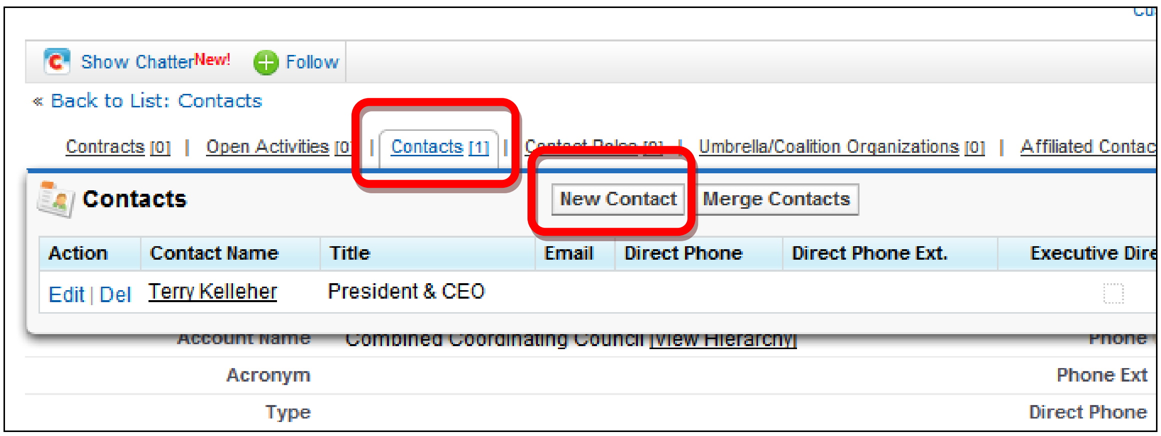
Search by name the **Organization** to which you want to add a **Contact.**



Click on the Organization name from the search results.

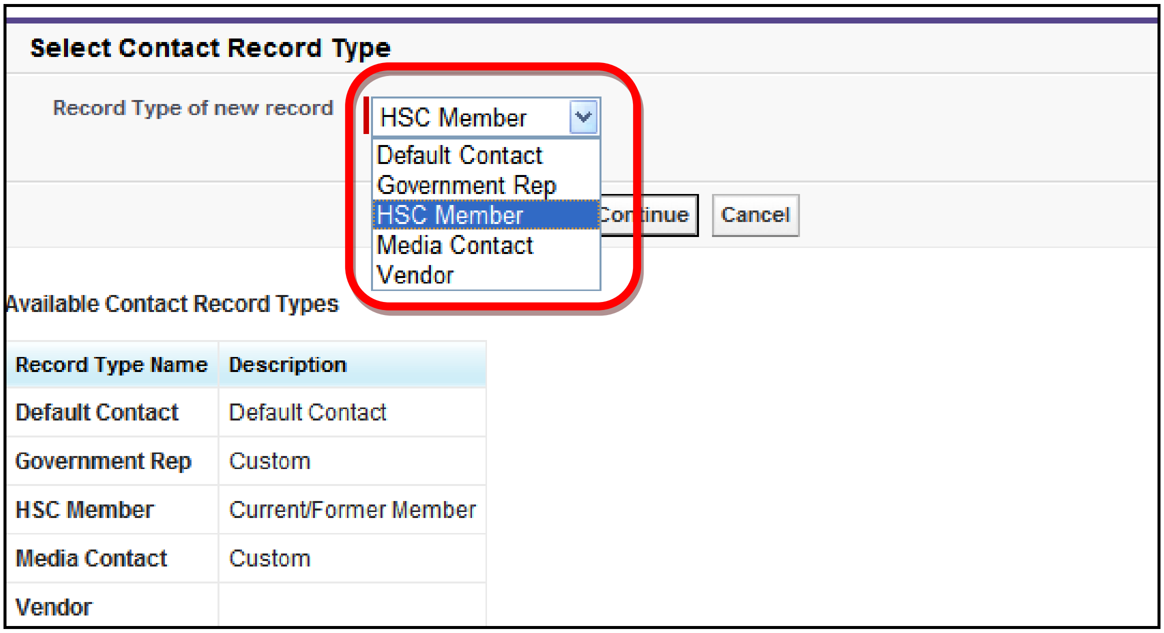


Click on the **Contacts** link, and then click **New Contact.**

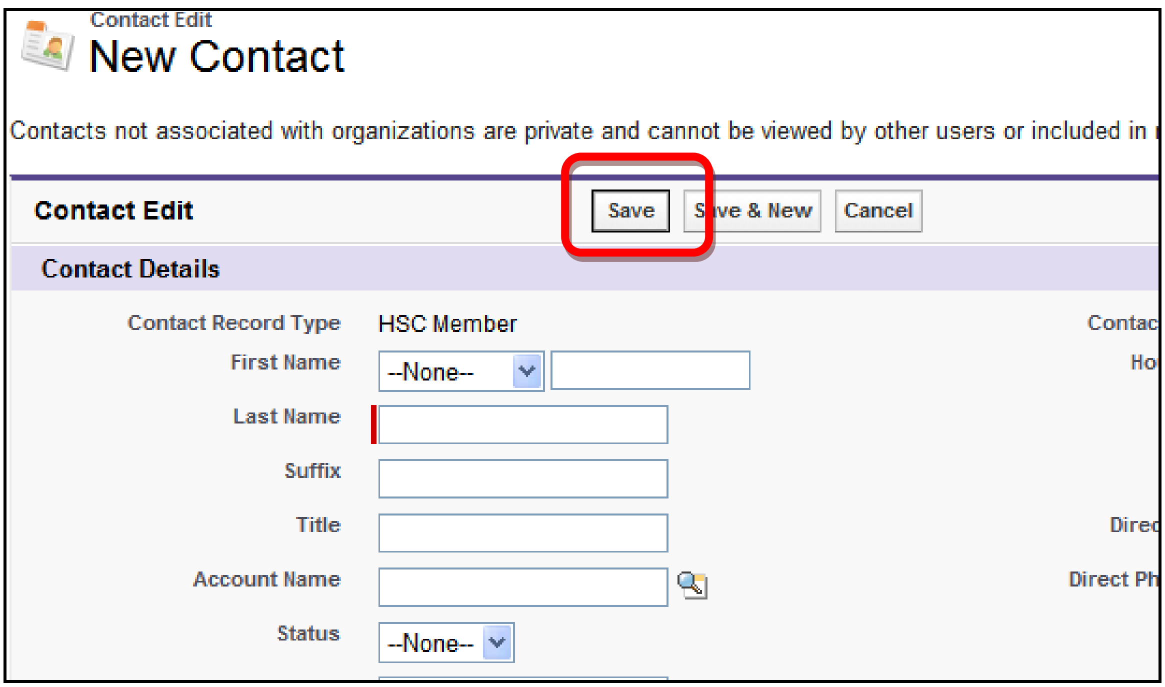


Select a **Record Type** for the New Contact. Each selected Record Type will display a different set of fields to fill in.

Click on **Continue.**

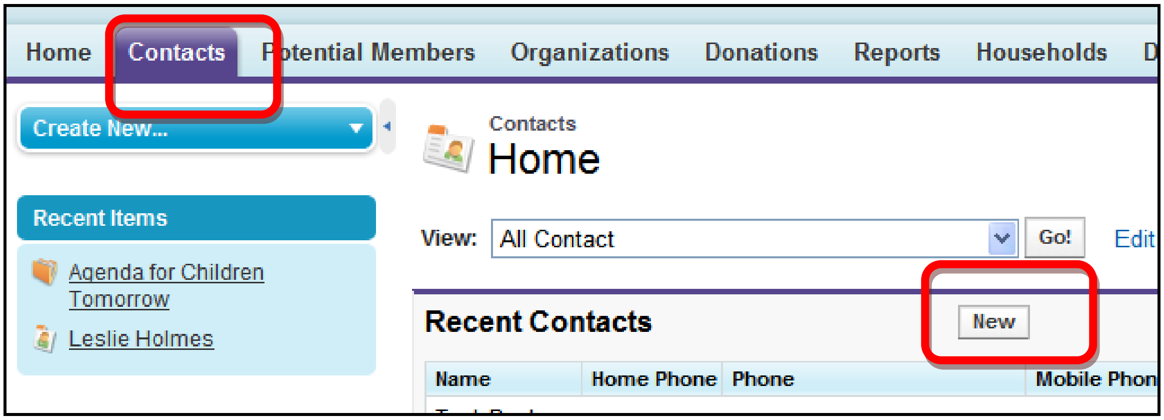


Fill in the fields and click **Save**.

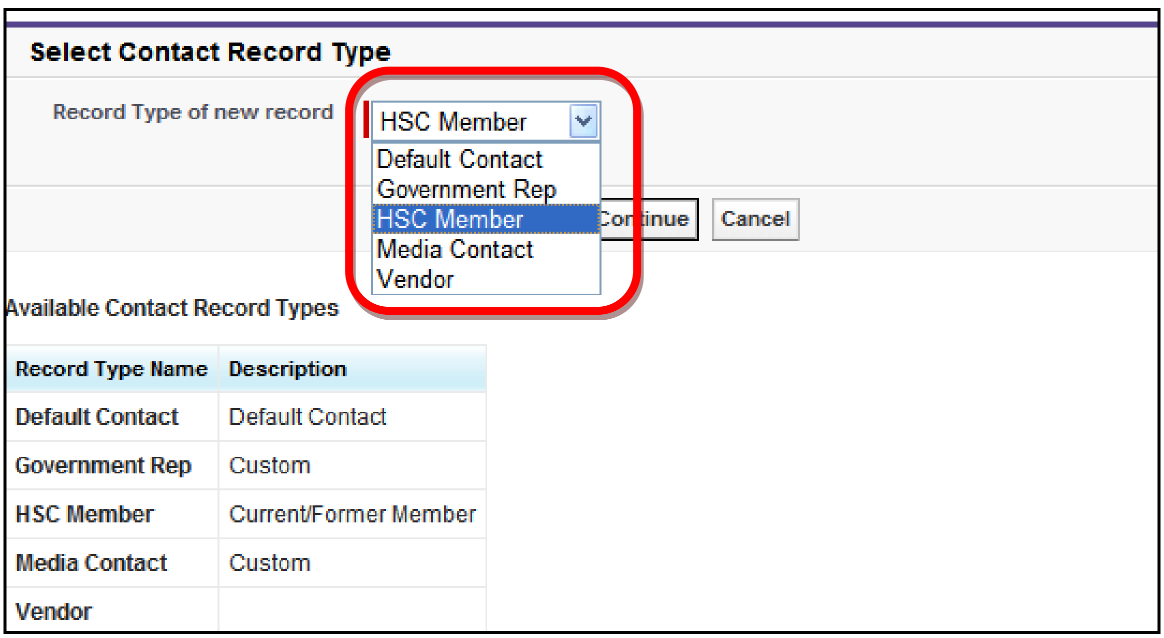


Creating a New Contact from the Contacts Tab

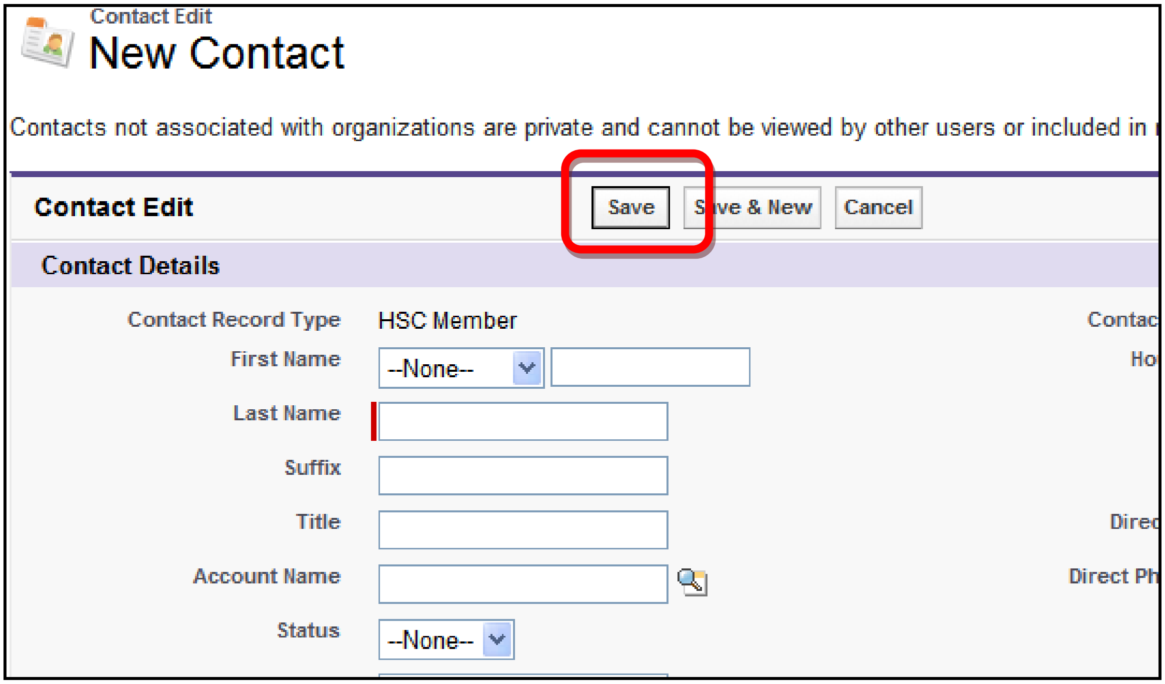
To create a new **Contact,** click the **Contacts** tab**,** and then click on **New.**



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

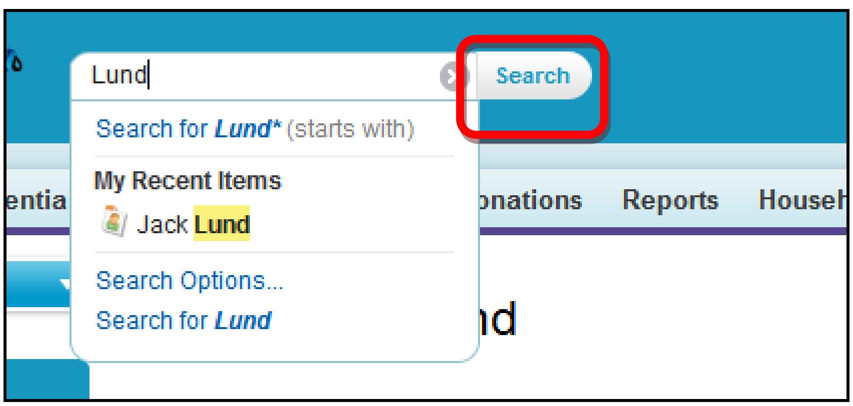


Fill in the fields and click **Save**.

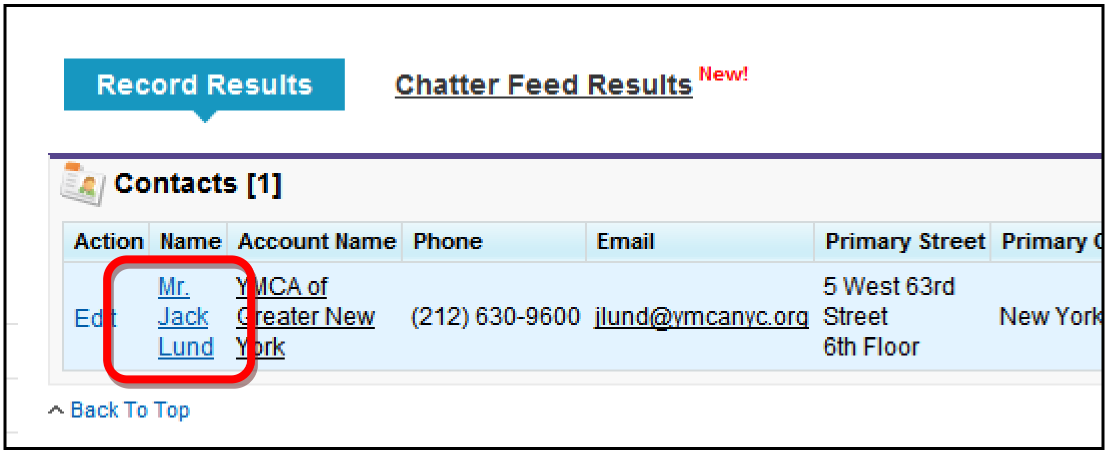


Updating an Existing Contact

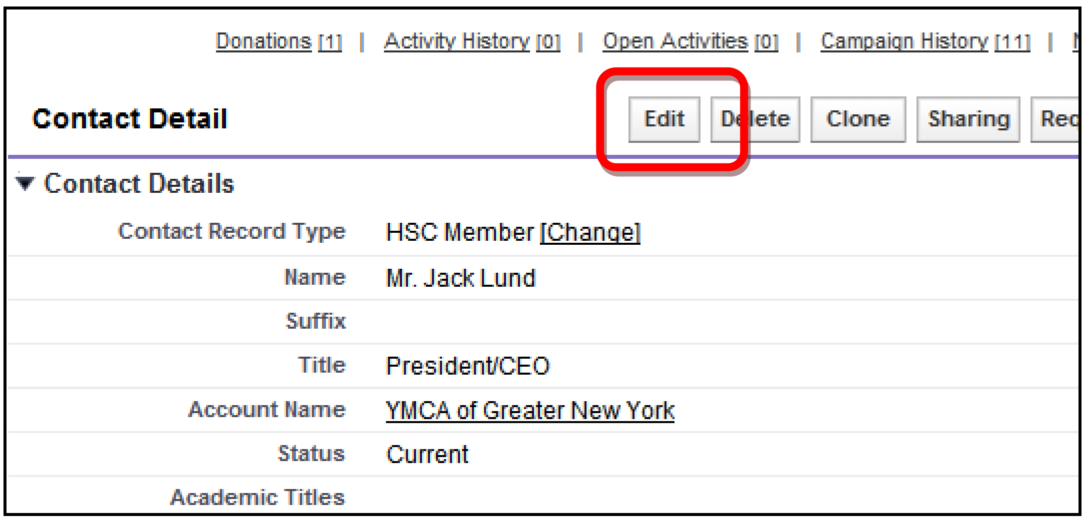
To update an existing **Contact,** type in the **Contact Name** in the **Search** box and click **Search.** You can type in either first or last name, or a portion of a name.



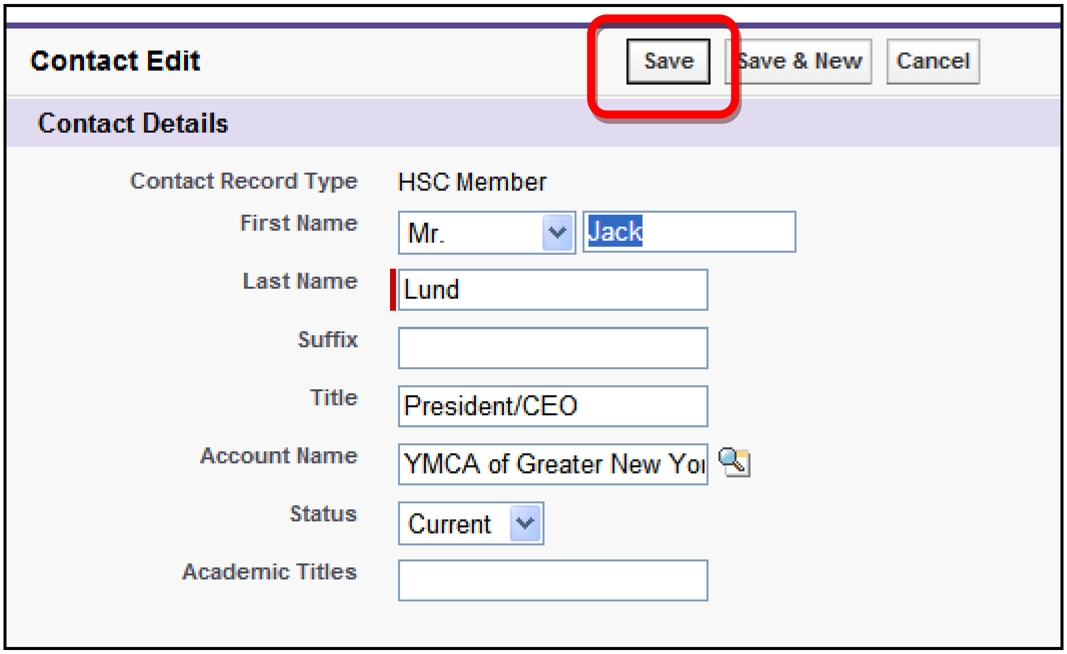
Click on the **Contact** Name from the search results.



Click **Edit.**



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



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.**

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
Edit	Jack Rosenthal	Atlantic Philanthropies						
Edit	Hon. Jack Quinn	NY State Assembly Members			543 Legislative Office Building	Albany	NY	12248-0001
Edit	Mr. Jack Rosenthal	New York Times Foundation			229 West 43rd Street	New York	NY	10036
Edit	Jack Doyle	New Settlement Apartments	(718) 716-8000 x123	j.doyle@newsettlement.org	1512 Townsend Avenue	Bronx	NY	10452
Edit	Mr. Jack Krauskopf	Baruch College	(646) 660-6724	james_krauskopf@baruch.cuny.edu	135 East 22nd St., Room 915 One Bernard Baruch Way, Box D-901	NY	NY	10010
Edit	Mr. Jack Lund	YMCA of Greater New York	(212) 630-9600	jlund@ymcanyc.org	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.

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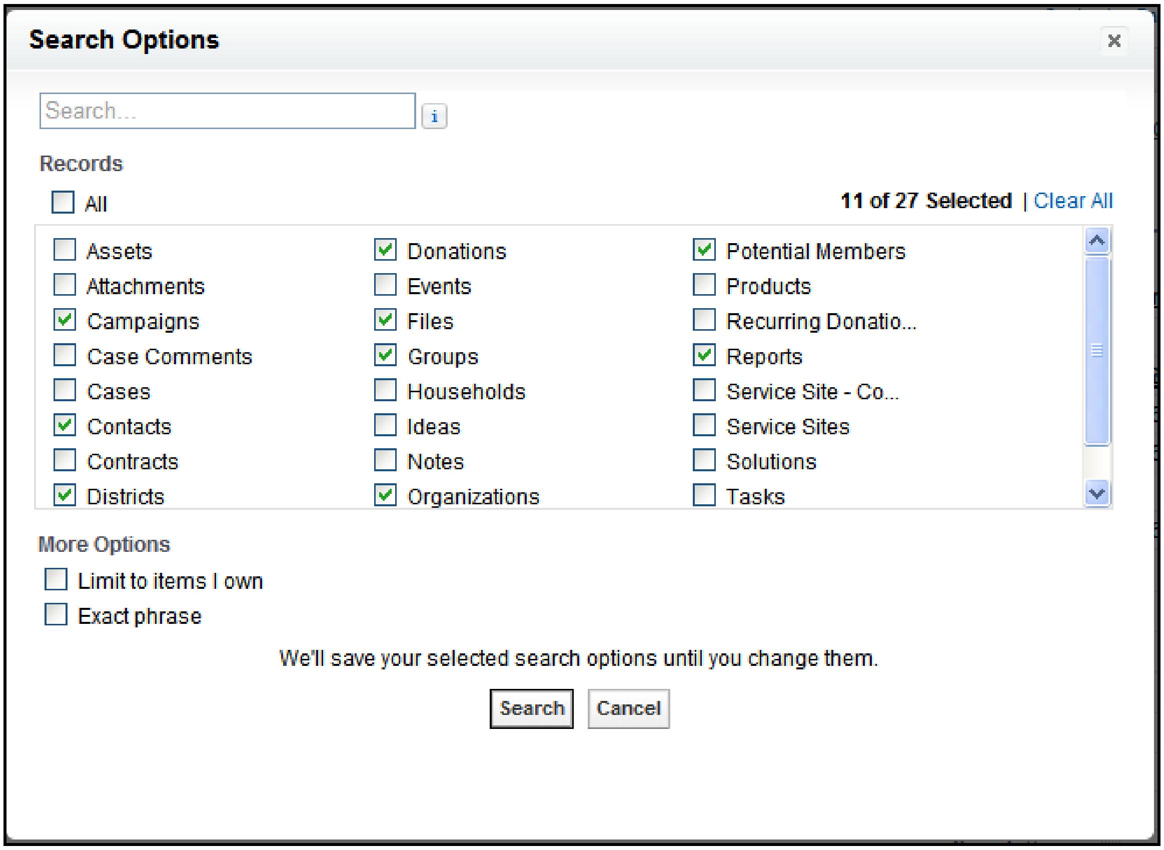


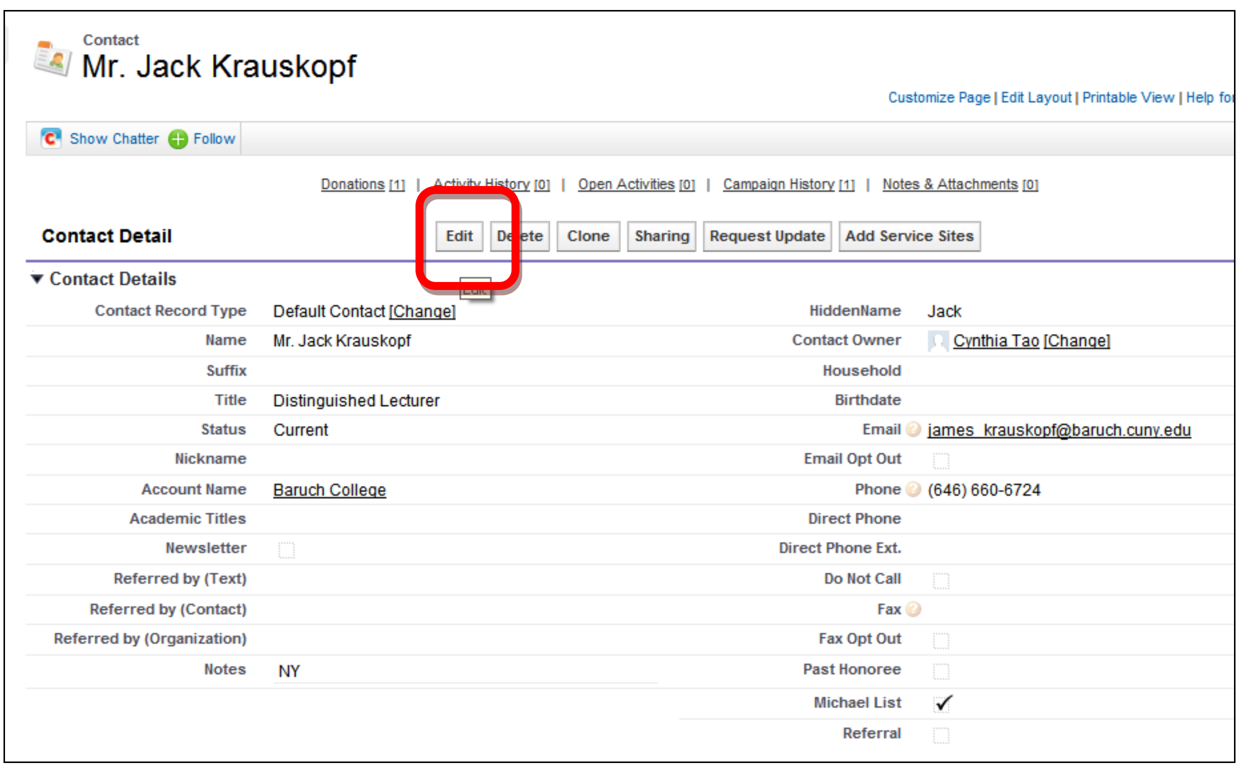
How to Create/Update Contacts/Organizations that are not HSC Members

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.

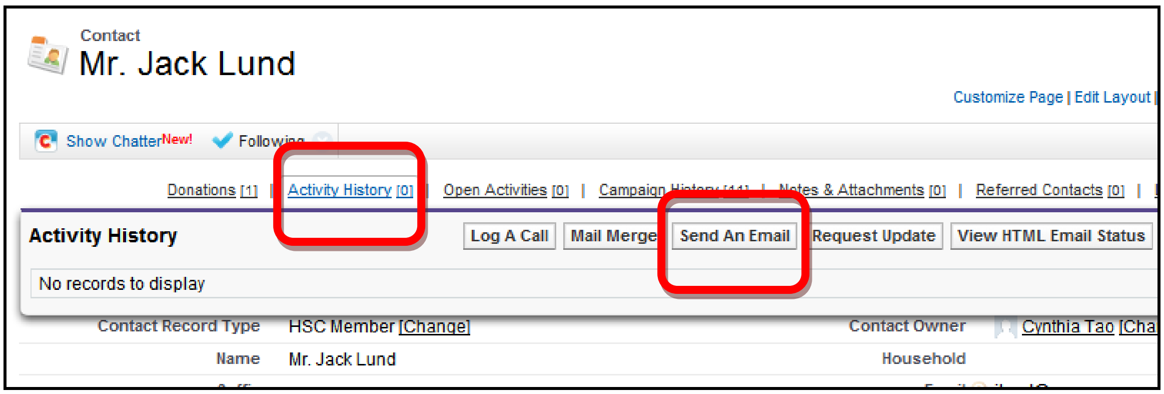
Click on the **Contact** Name from the search results.

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

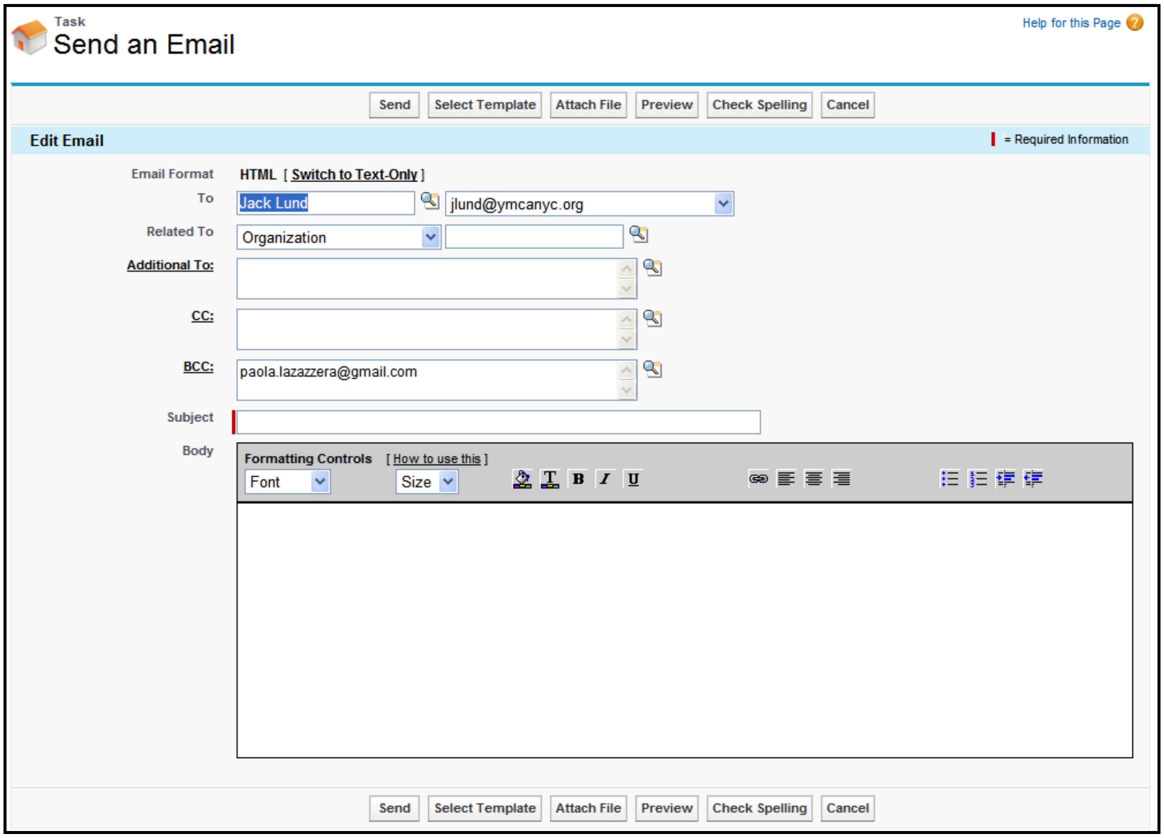


How to Send an Email, Free-Form or Using a Template

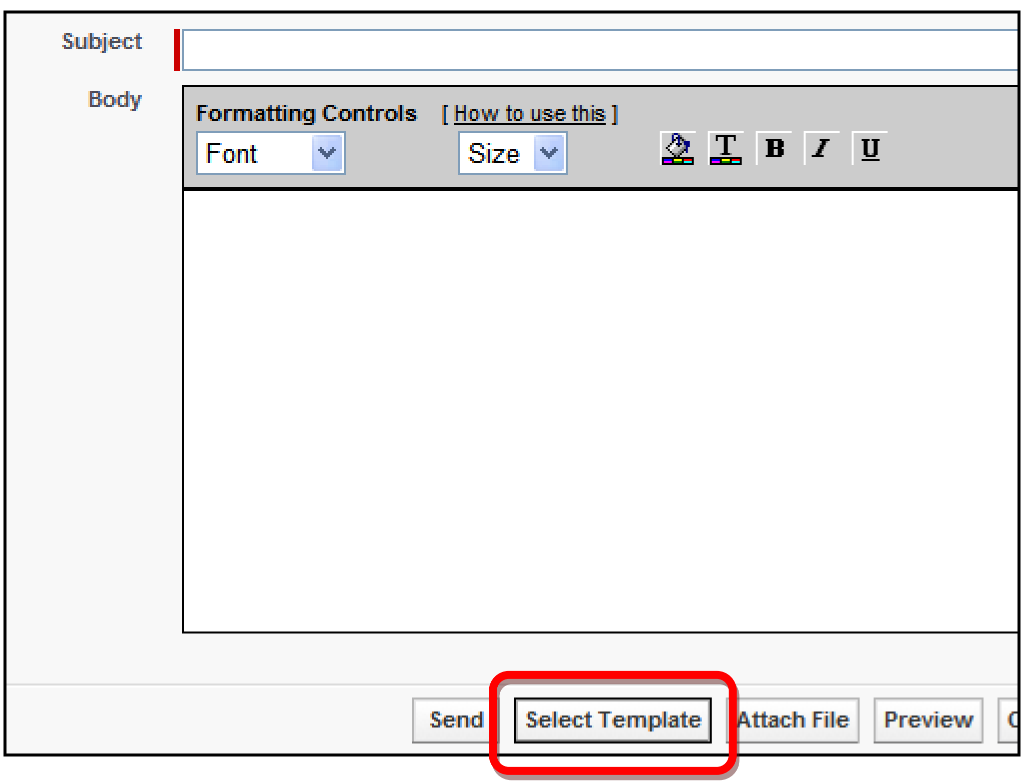
You may want to send an email through Salesforce in order to keep track of the email in the database or to use the email templates that have been created and stored in the database. To send an email to a single Contact, select the desired Contact (using the Search box to type in all or part of the Contact's 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.



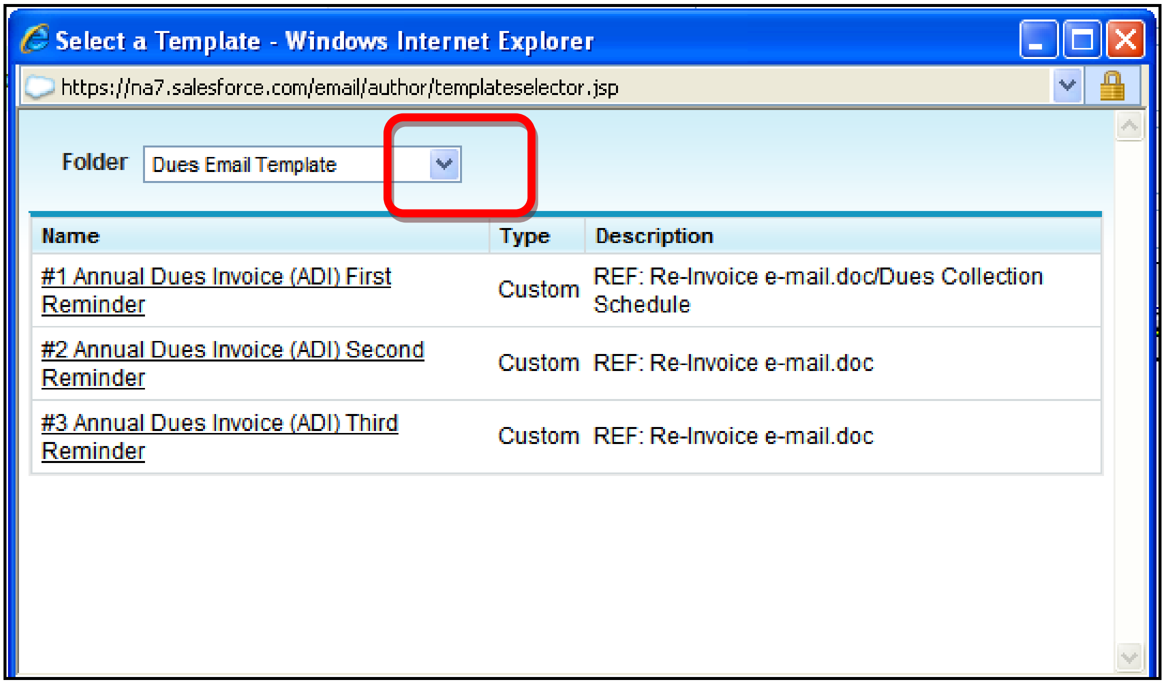
If you are sending a free-form email, type in the Subject and Body text for the e-mail message you wish to send.



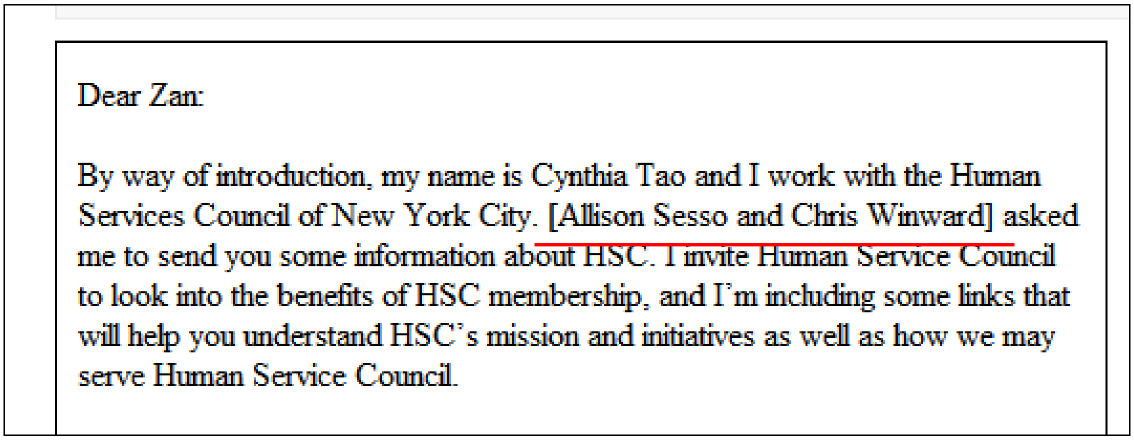
If you want to use an existing email **Template**, click **Select Template.**



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.



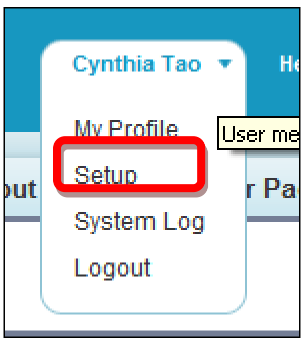
Click on the template that you want to send. You will see the email filled in with any appropriate information for the recipient, including organization name and address or other fields. Please preview the email and check for bracketed text ([*changeable text]),* which will need to be updated before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

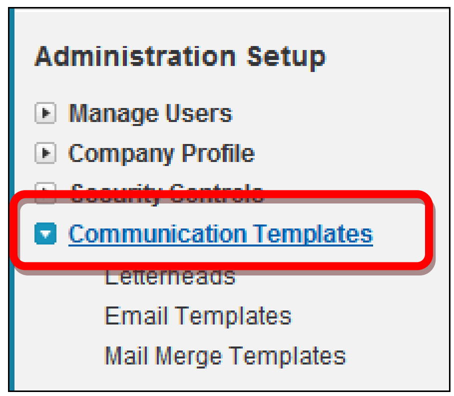


Dear Zan:

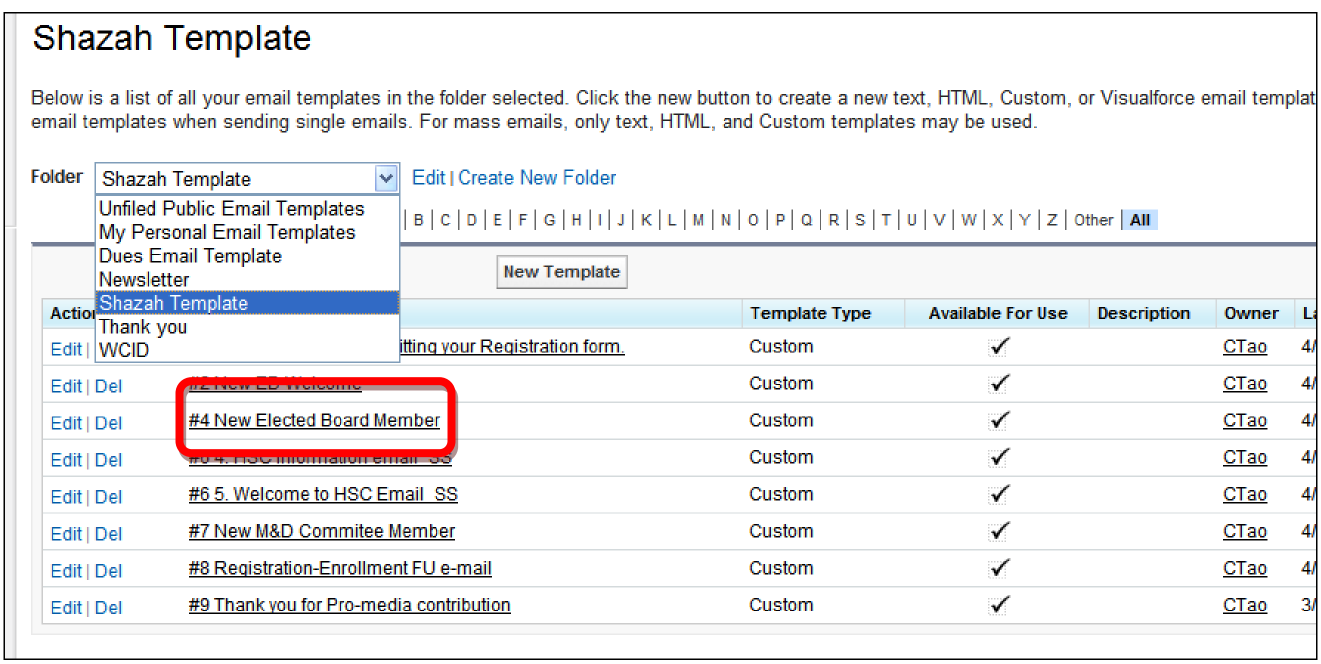
By way of introduction, my name is Cynthia Tao and I work with the Human Services Council of New York City. [Allison Sesso and Chris Winward] asked me to send you some information about HSC. I invite Human Service Council to look into the benefits of HSC membership, and I'm including some links that 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***

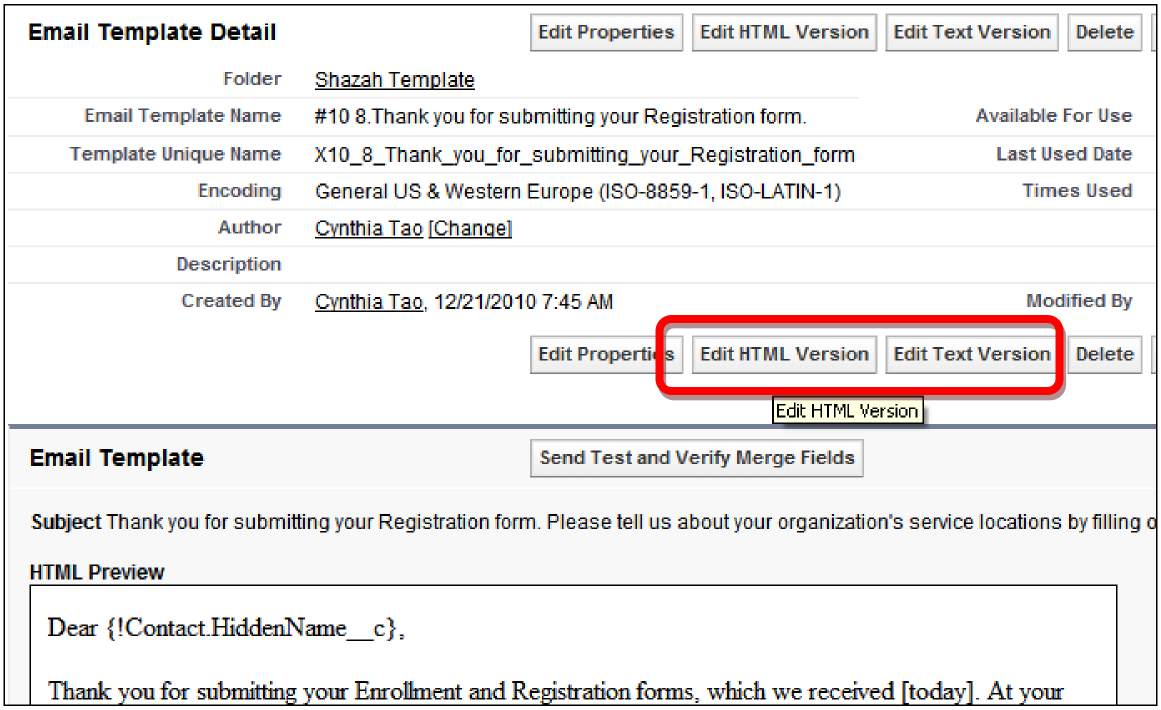




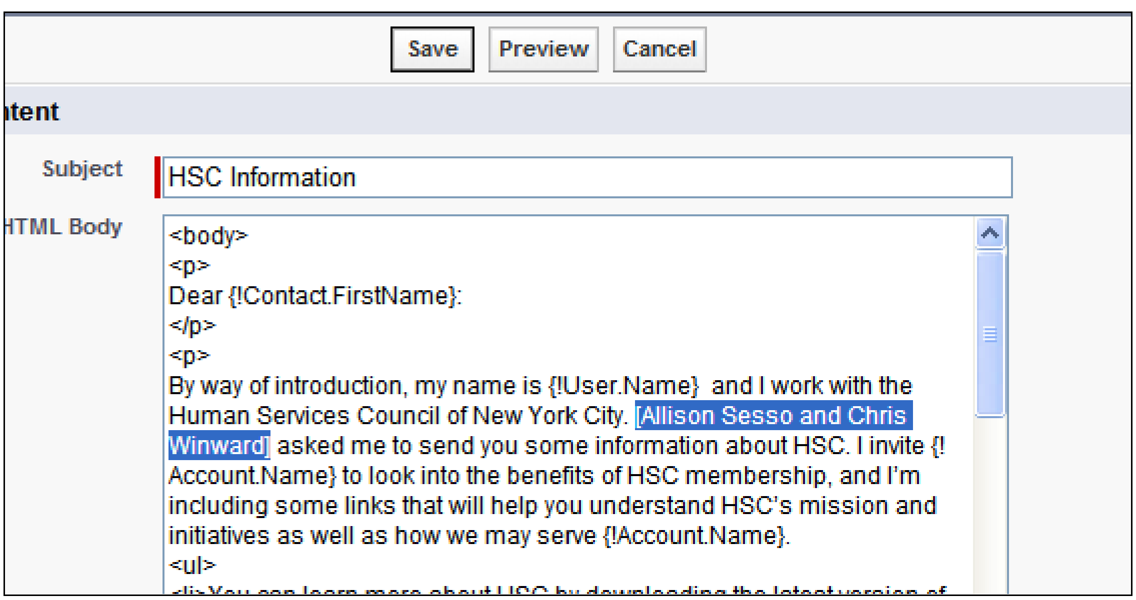
Select the folder containing your template. Click on the template name.



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



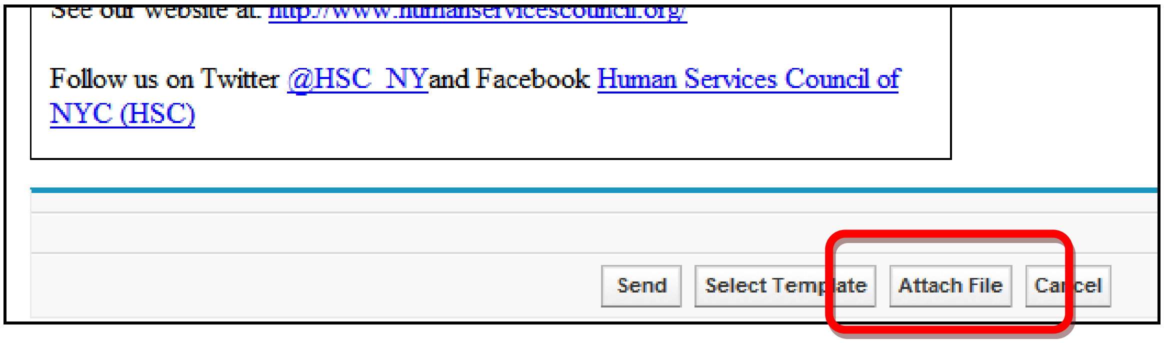
Change the bracketed text. Press the button **Save.**



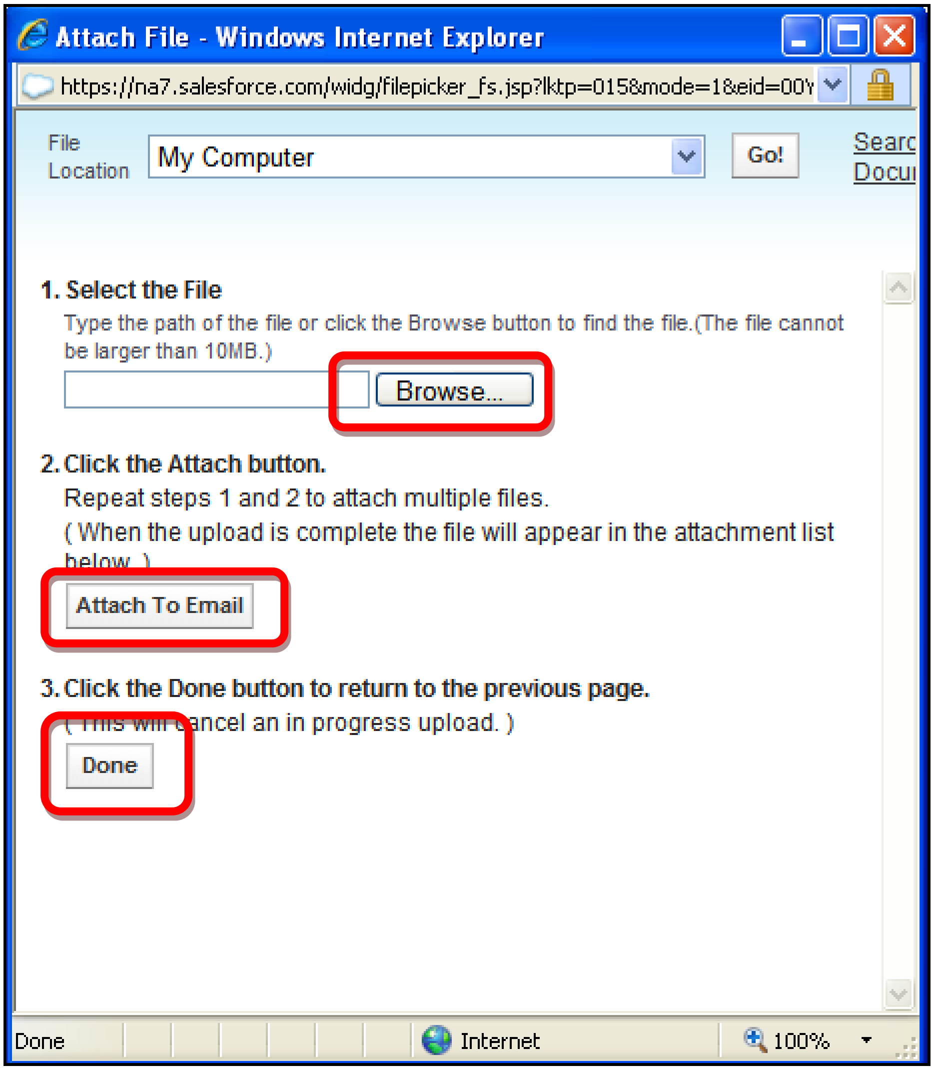
You will be then able to send the e-mail using the updated template.

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

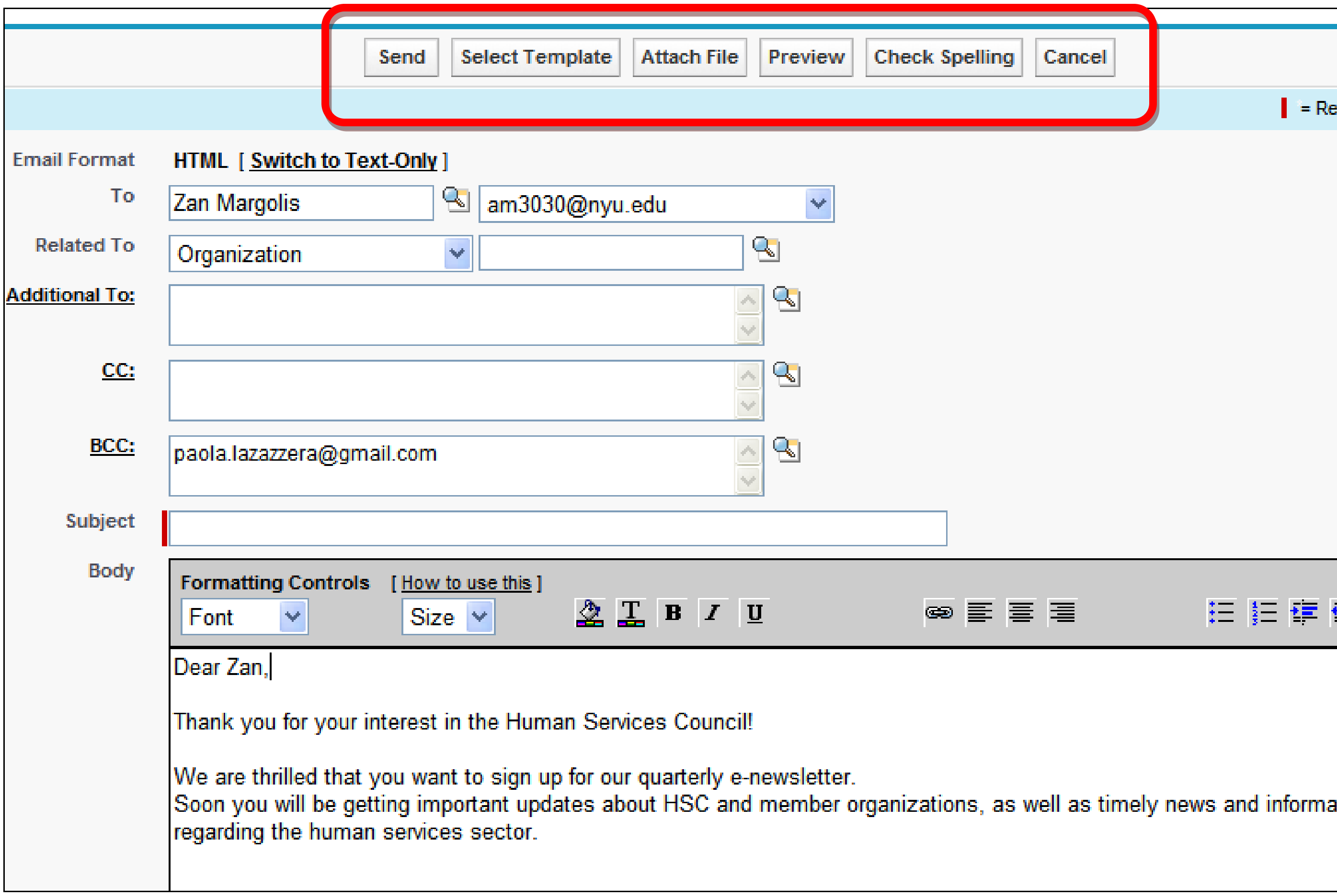
You can also attach a file by clicking **Attach File.**



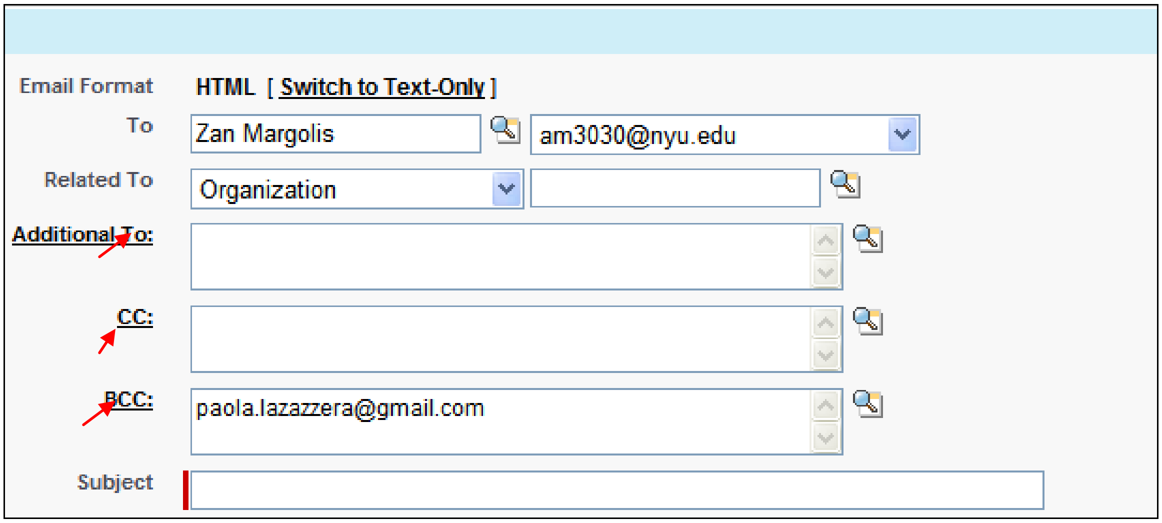
You can select a file from your computer or from the shared library disk, as well as from a list of files stored in Salesforce (such as an HSC logo or signatures). Select the file you wish to attach, click **Attach To Email,** then click **Done.**



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



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



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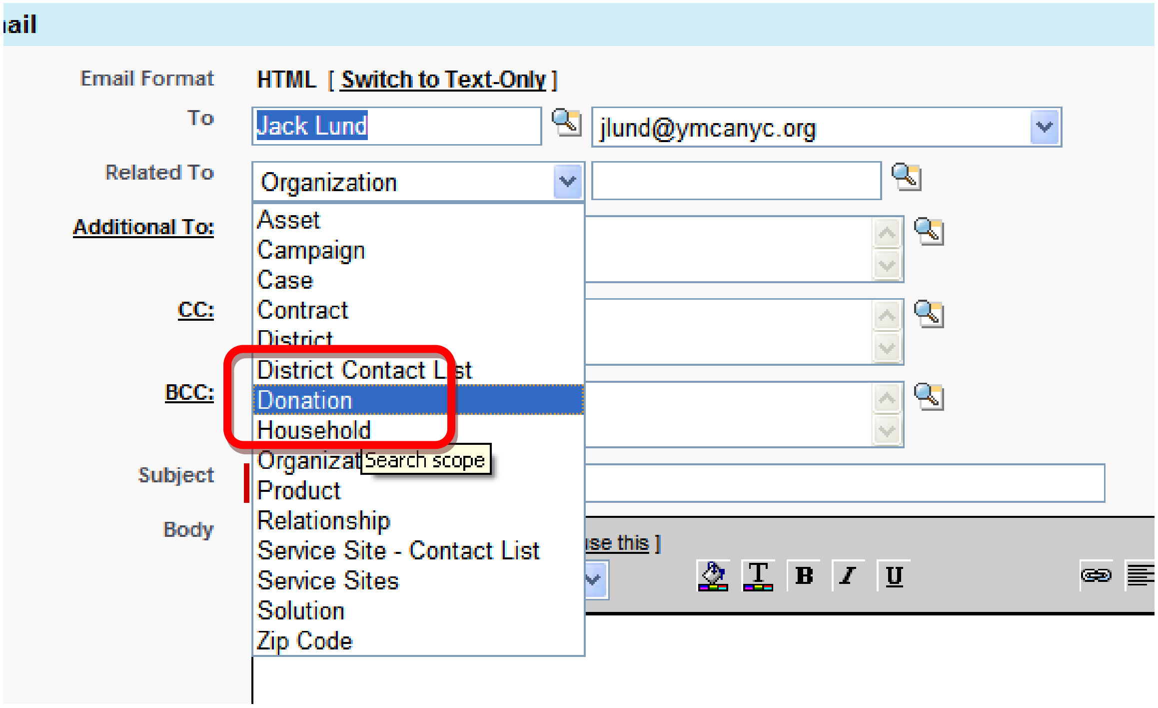
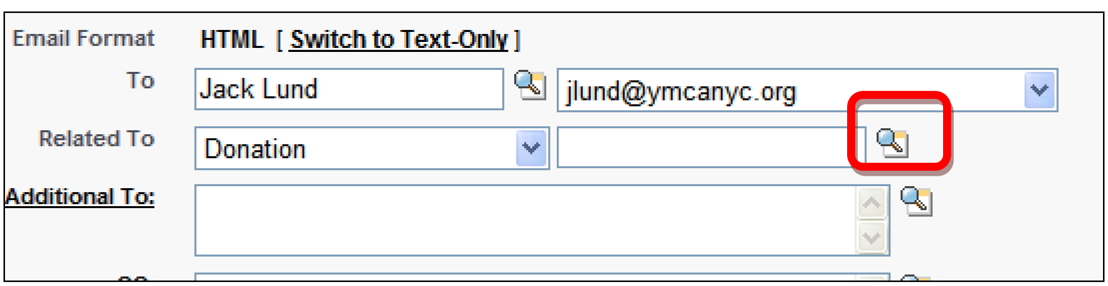
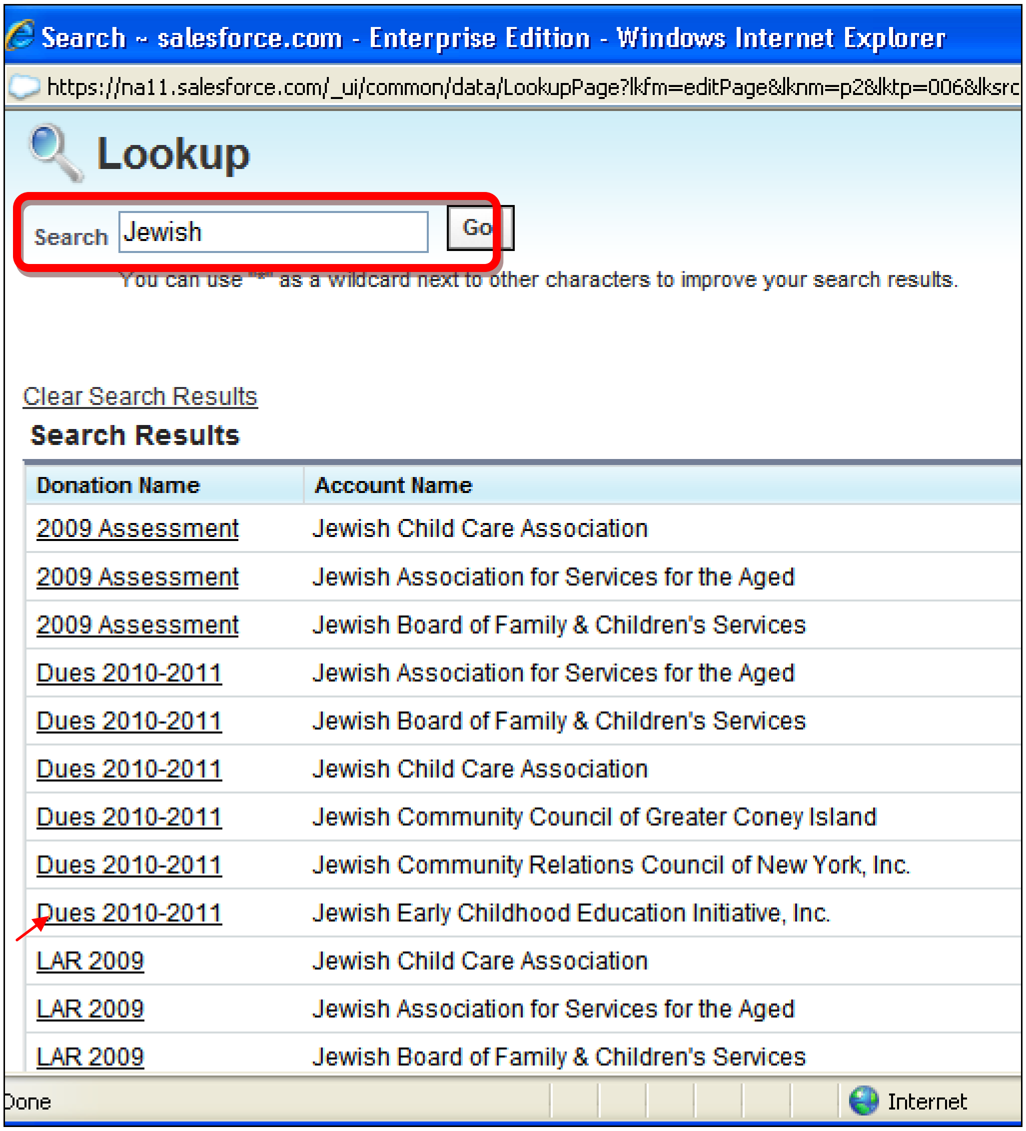
The field **Related To** is not required except for templates under the folder **Dues Email Template**. In this case you need to select **Donation** from the drop down list **Related To.**



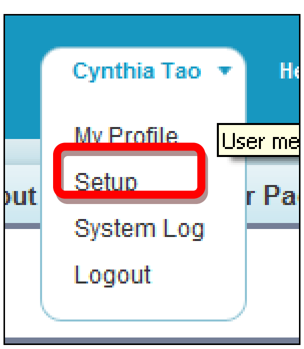
Then click on the button 

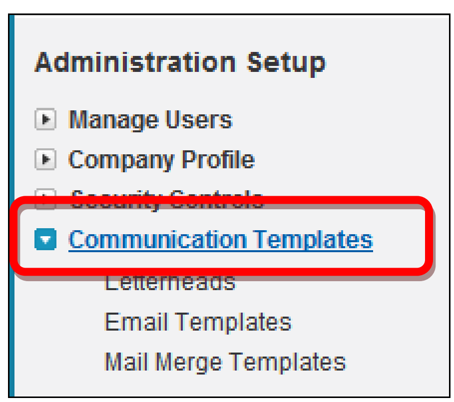


Type in the **Organization Name** (or part of it) in the field **Search**, press **Go!** Then select the Dues from the results list.

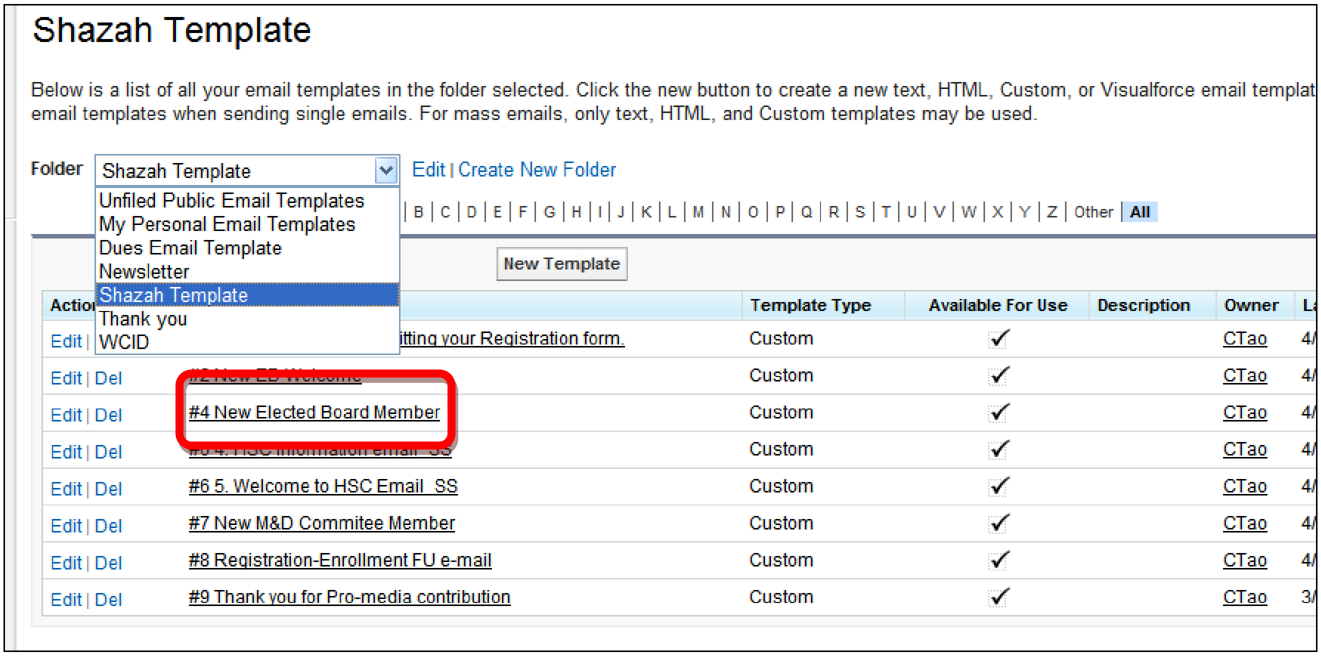


You can also preview an e-mail using a template going to ***Your Name*** >> ***Setup*** >>***Communication Templates*** >> ***Email Templates***

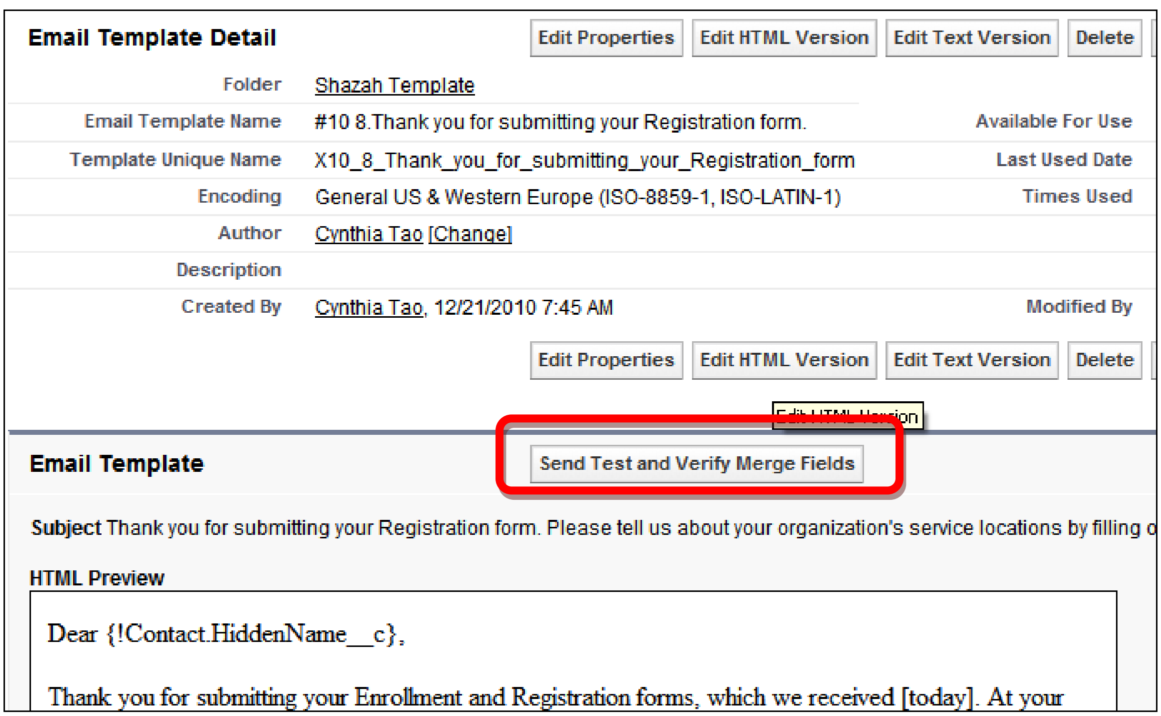




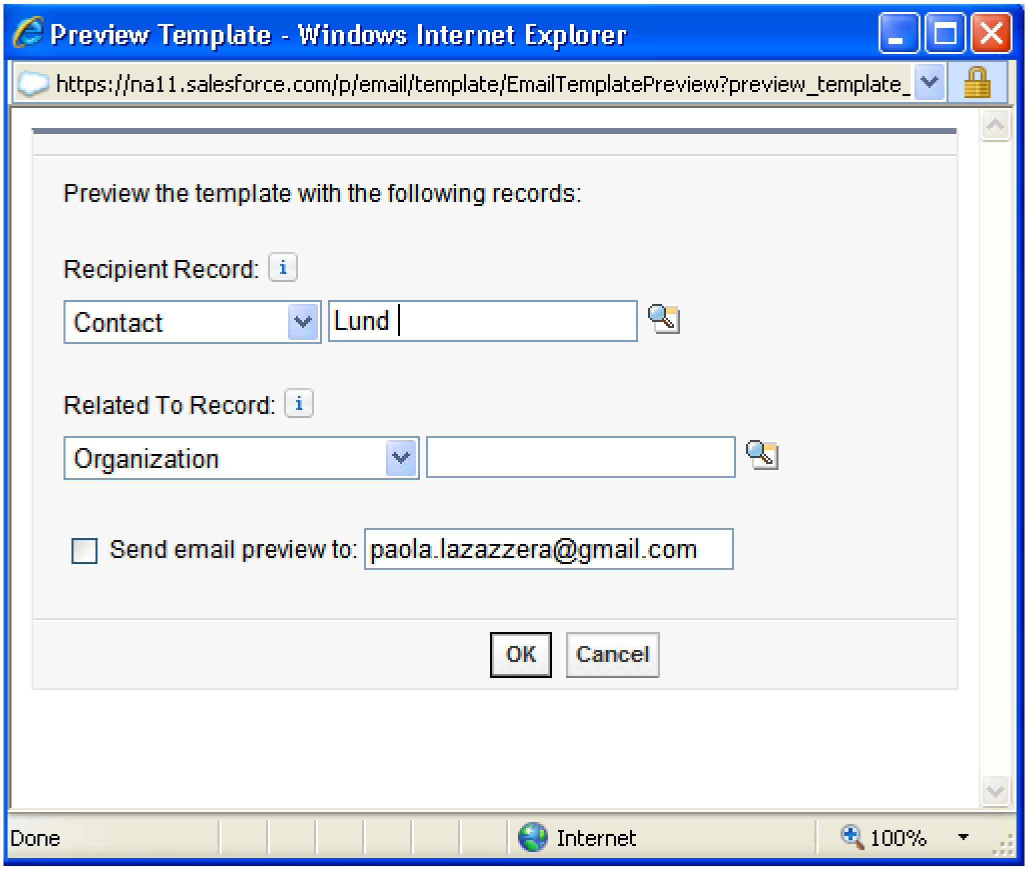
Select the folder containing your template. Click on the template name.



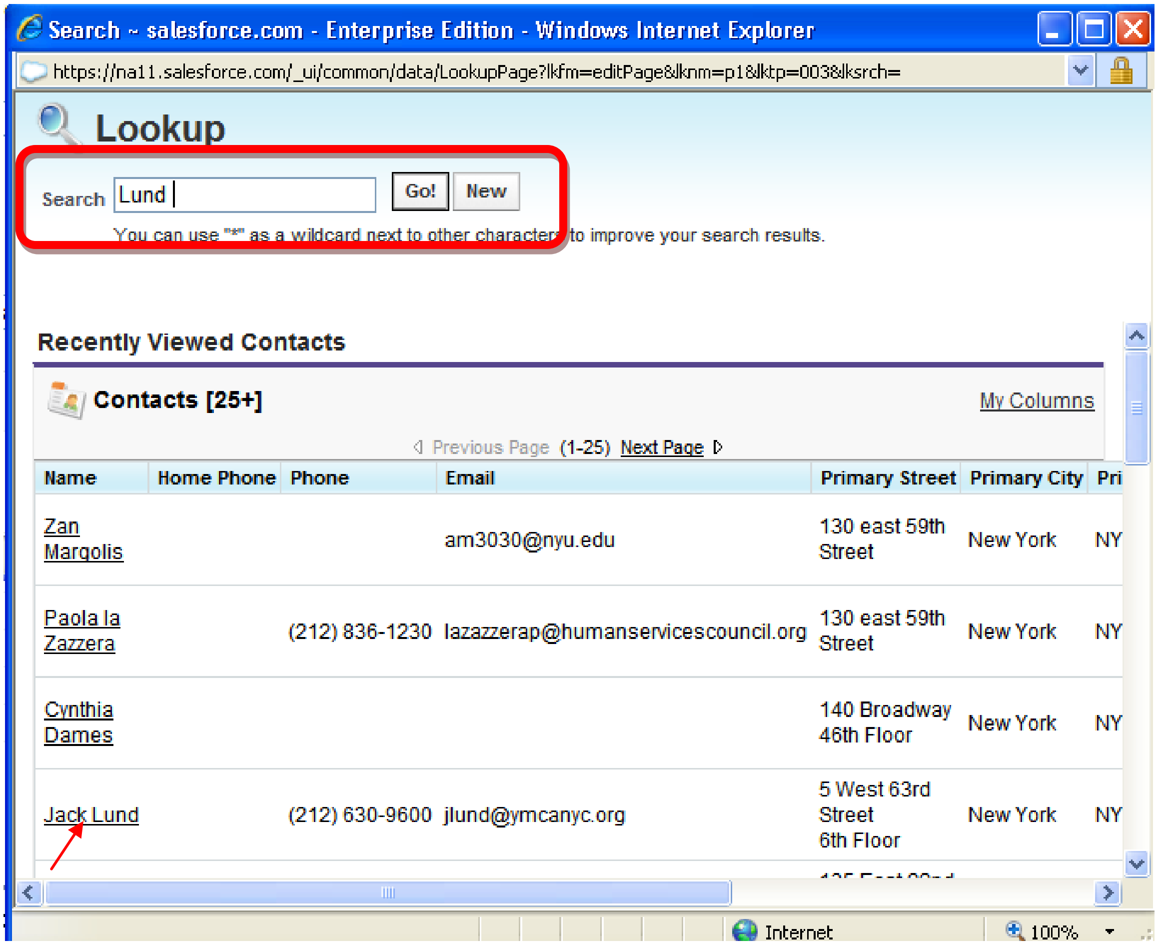
Press the button **Send Test and Verify Merge Fields.**



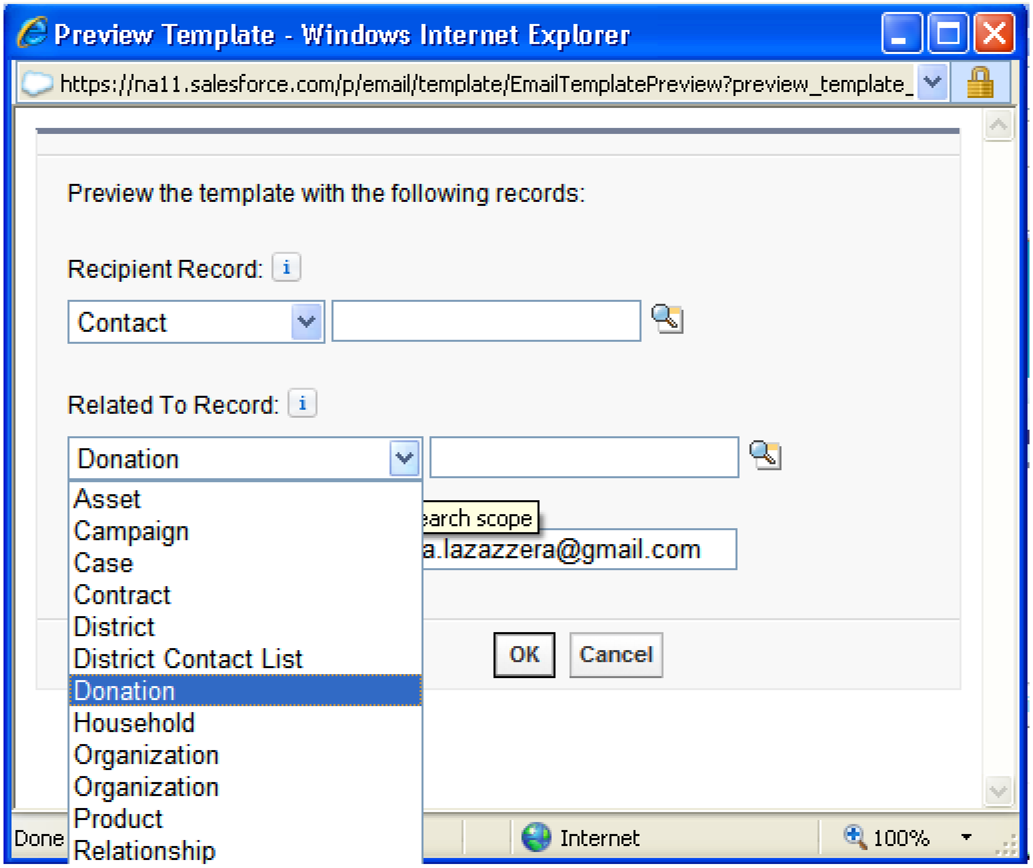
Type in the **Contact Name** in the **Field Recipient Record** (you can type in either first or last name or a portion of a name).



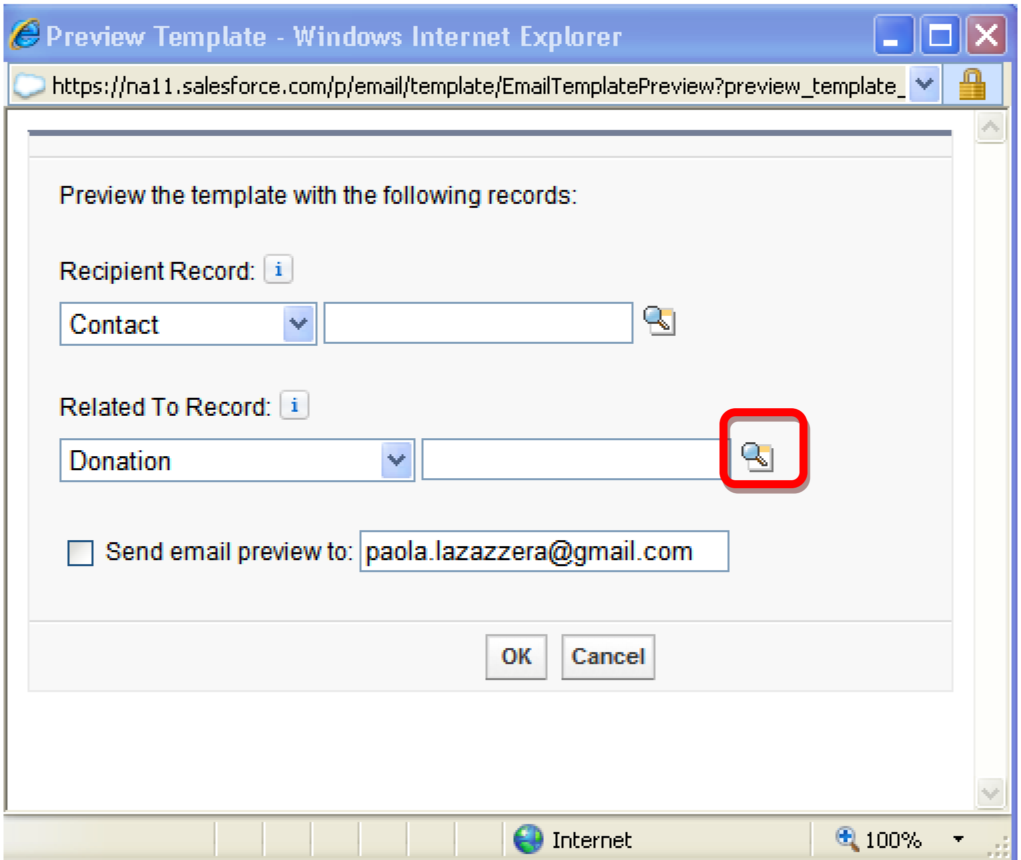
Click the button , type in the **Contact Name** in the **Search** (you can type in either first or last name or a portion of a name), press **Go!** Then select the **Contact Name** from the list of results.



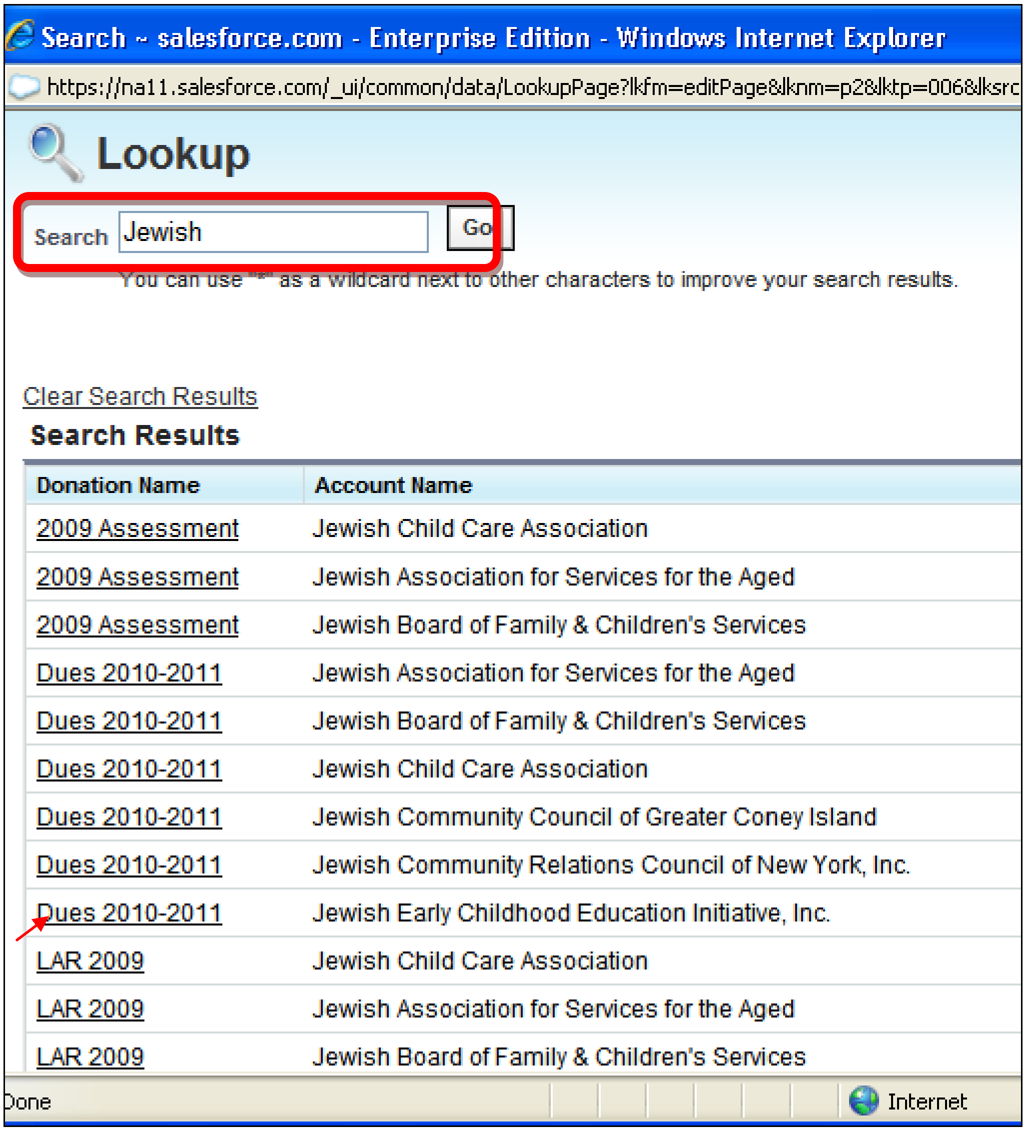
The field **Related To Record** is not required for the template implemented by now except for templates under the folder **Dues Email Template**. In this case you need to select **Donation** from the drop down list **Related To Record.**



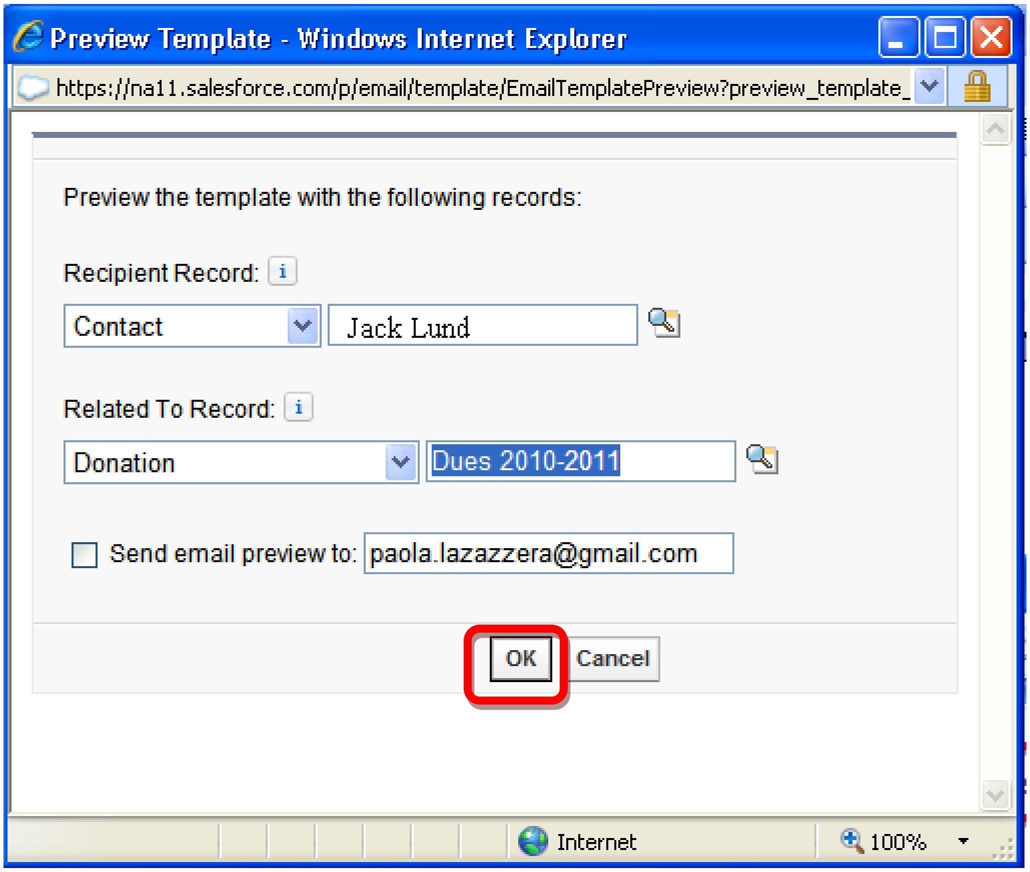
Then click on the button 

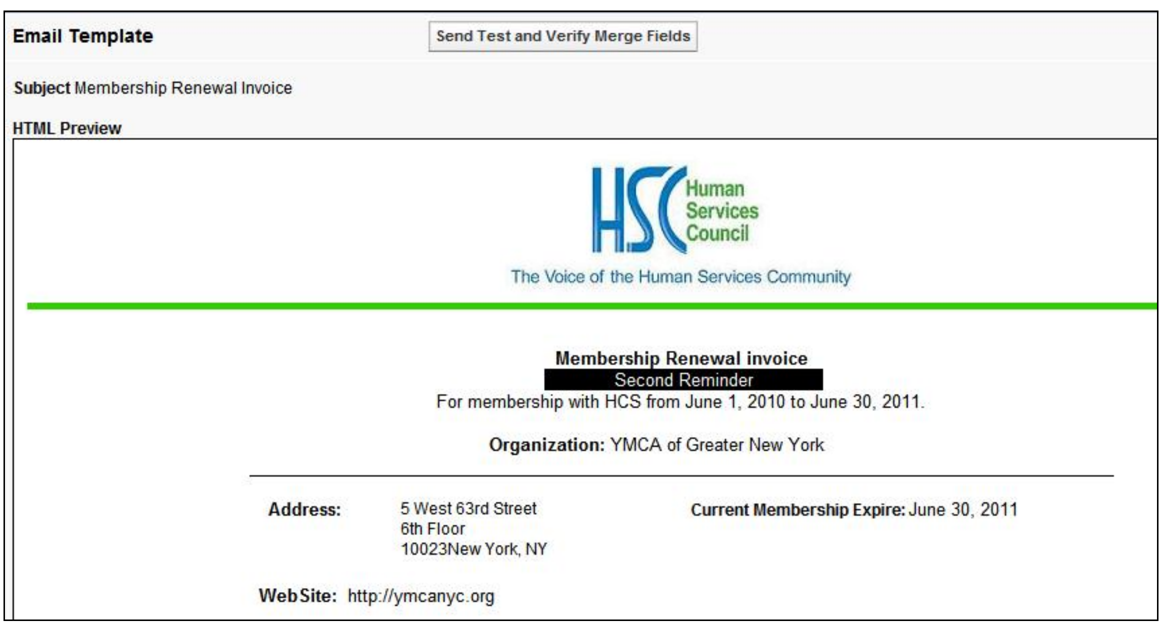


Type in the **Organization Name** (or part of it) in the field **Search**, press **Go!** Then select the Dues from the results list.



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

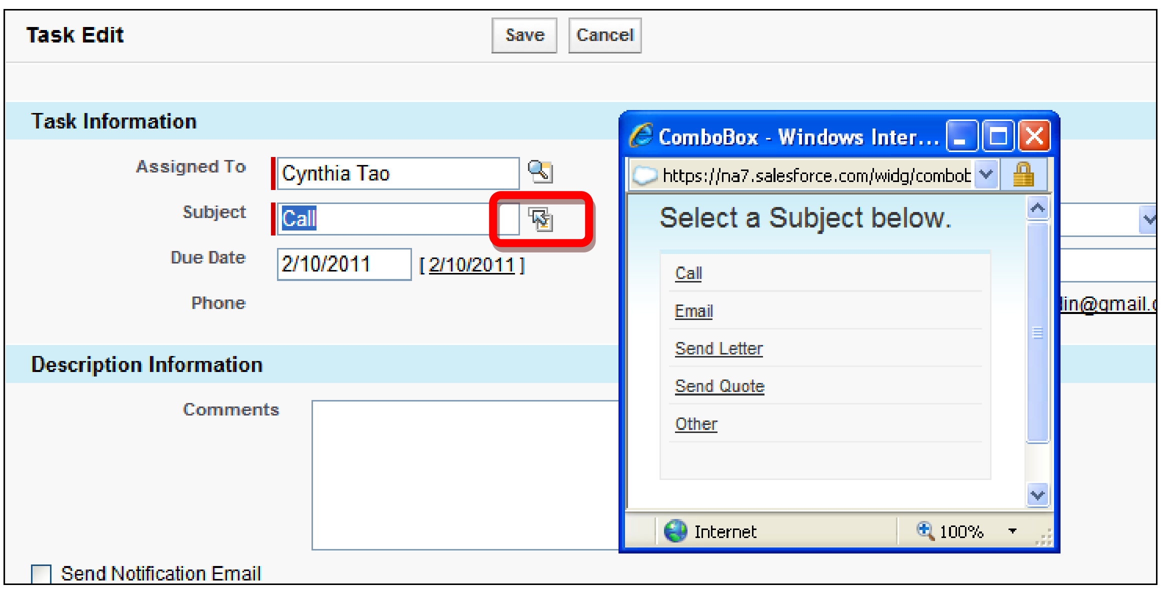

Preview Template - Windows Internet Explorer
https://na11.salesforce.com/p/email/template/EmailTemplatePreview?preview_template_
Preview the template with the following records:
Recipient Record:
Contact
Jack Lund
Related To Record:
Donation
Dues 2010-2011
Send email preview to: paola.lazazzera@gmail.com
OK
Cancel
Internet
100%


Email Template
Send Test and Verify Merge Fields
Subject Membership Renewal Invoice
HTML Preview
HSC Human Services Council
The Voice of the Human Services Community
Membership Renewal invoice
Second Reminder
For membership with HCS from June 1, 2010 to June 30, 2011.
Organization: YMCA of Greater New York
Address:
5 West 63rd Street
6th Floor
10023New York, NY
Current Membership Expire: June 30, 2011
WebSite: http://ymcanyc.org

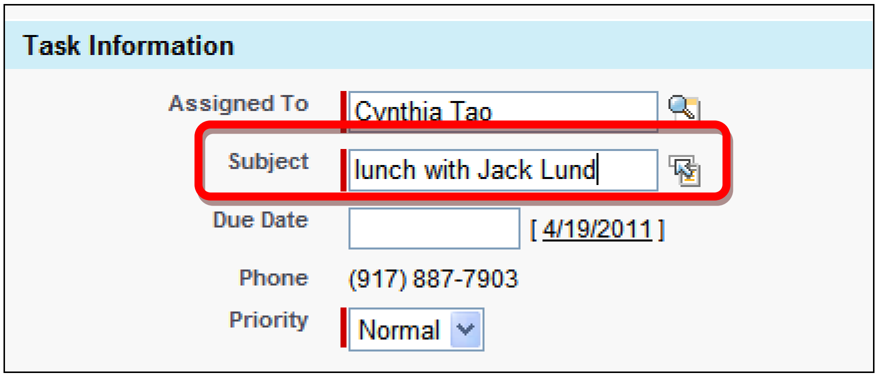
How to Track an Interaction

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.**

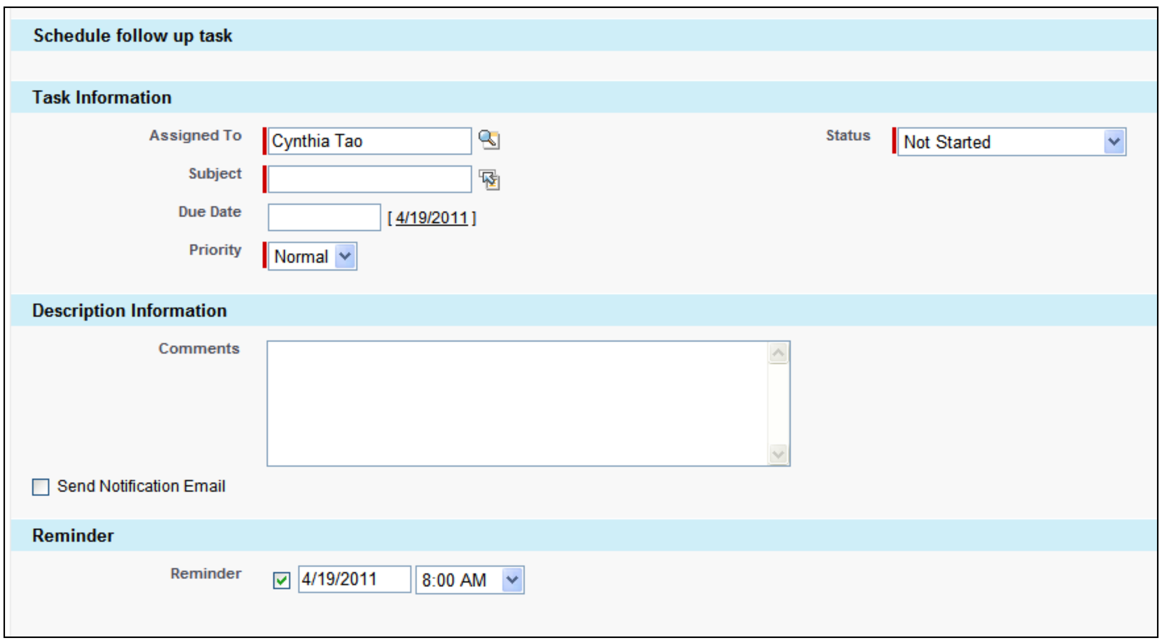
On the subject line, you can click on the arrowhead symbol to the right of the Subject box to see a list of possible subjects you can choose from.



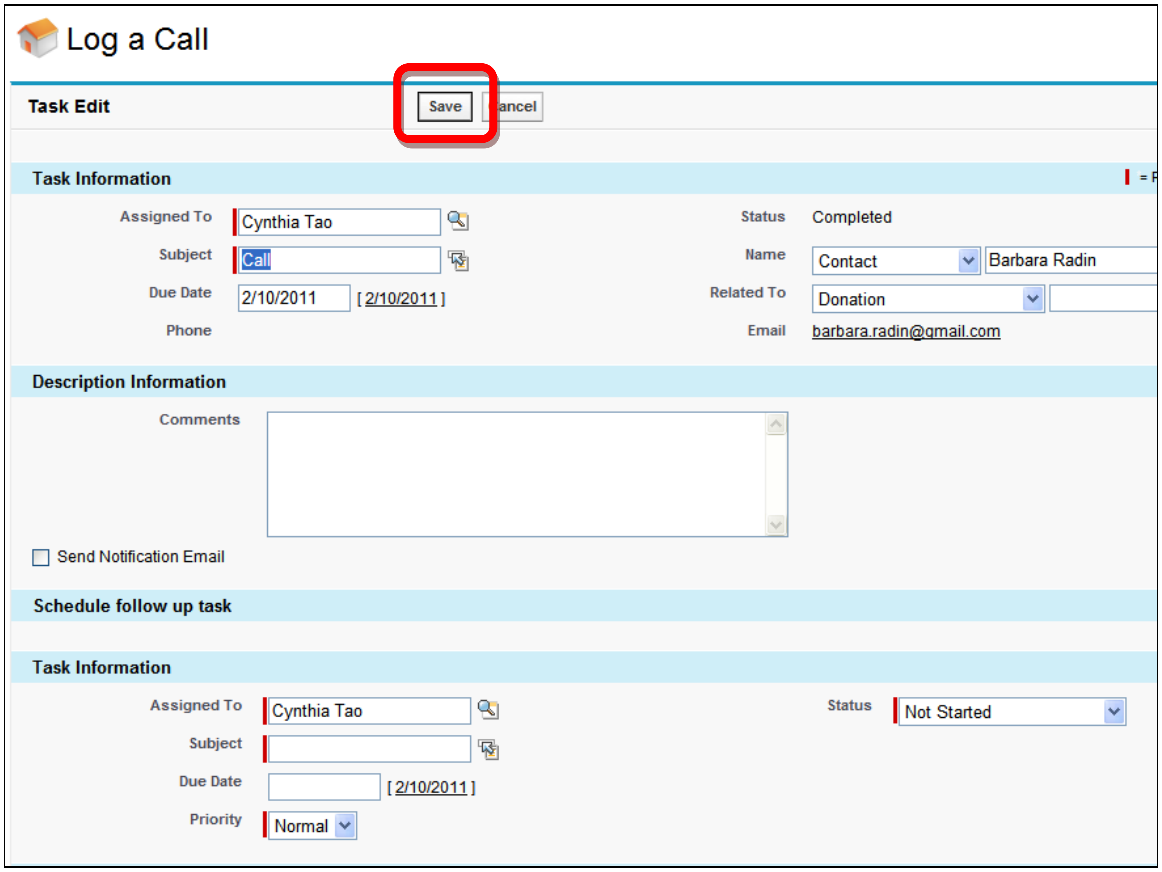
You can also type a specific Subject.



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



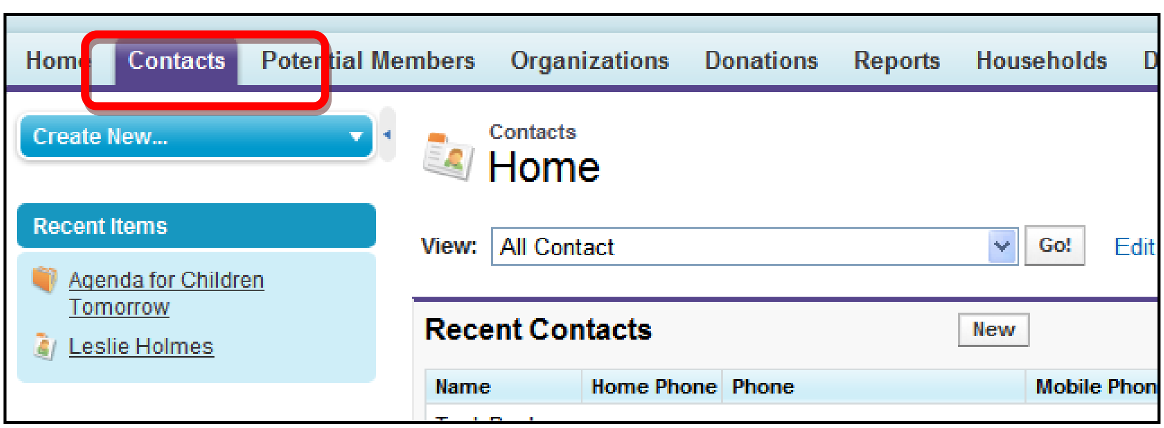
Fill the fields, then press **Save.**



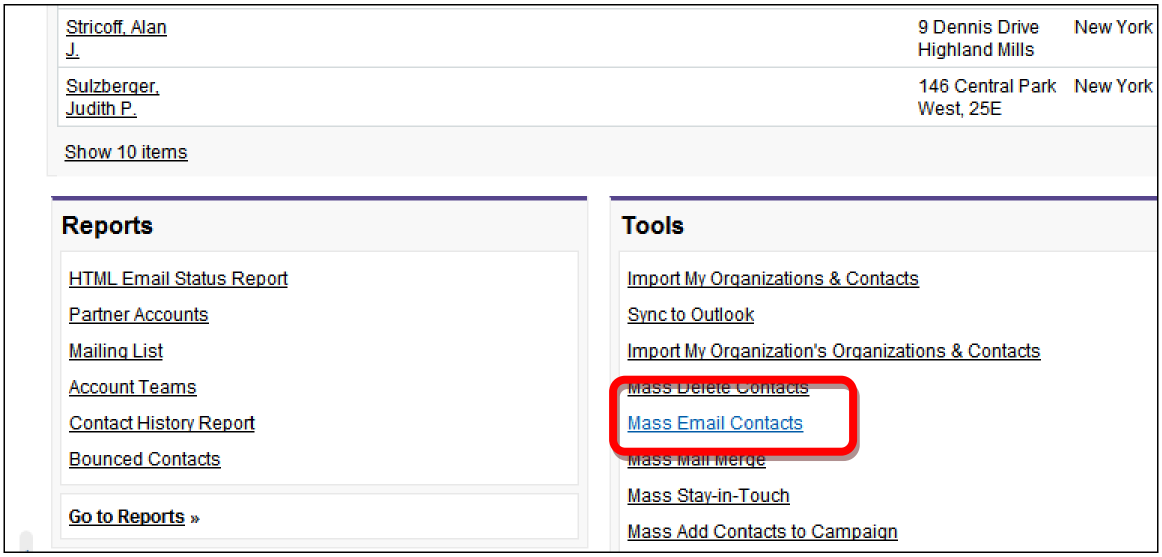
How to Send a Mass Email Using a Template

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.



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

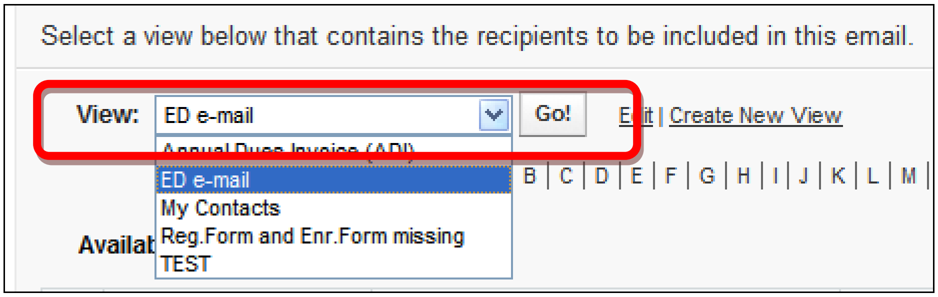


Select a **View** type from the drop-down menu. Then click **Go!**

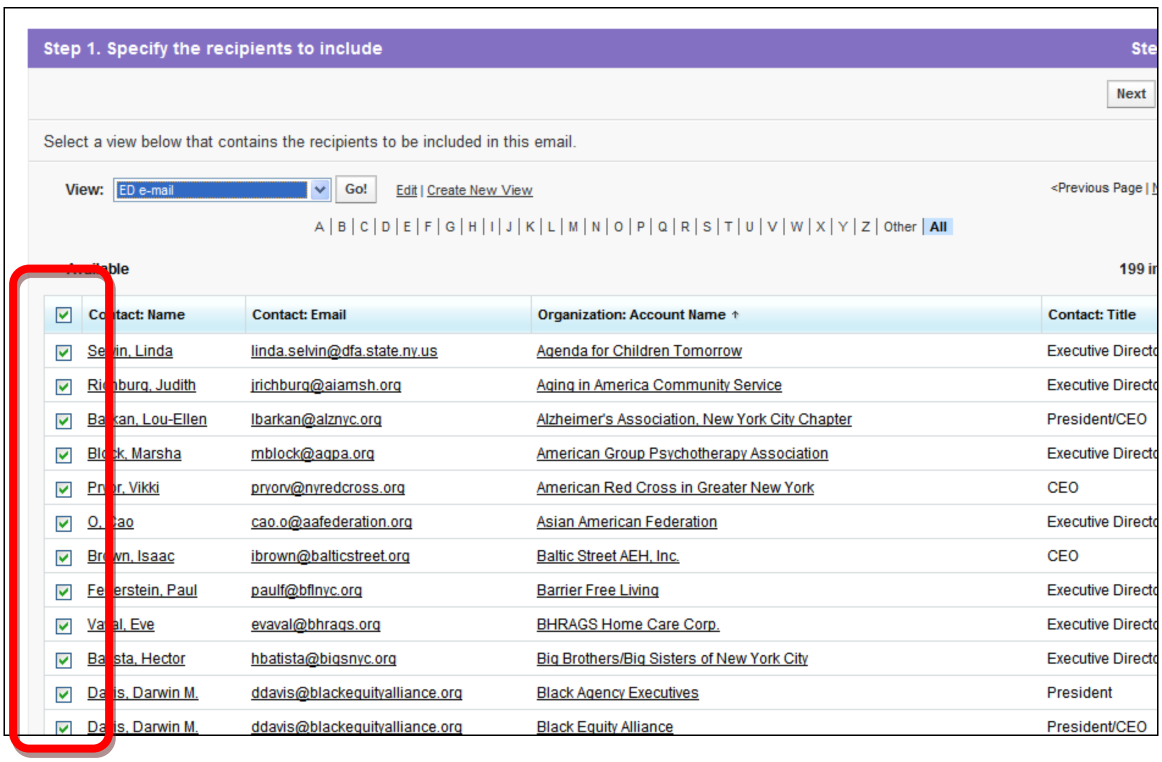
You can choose from a **variety of view types:**

- **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).**



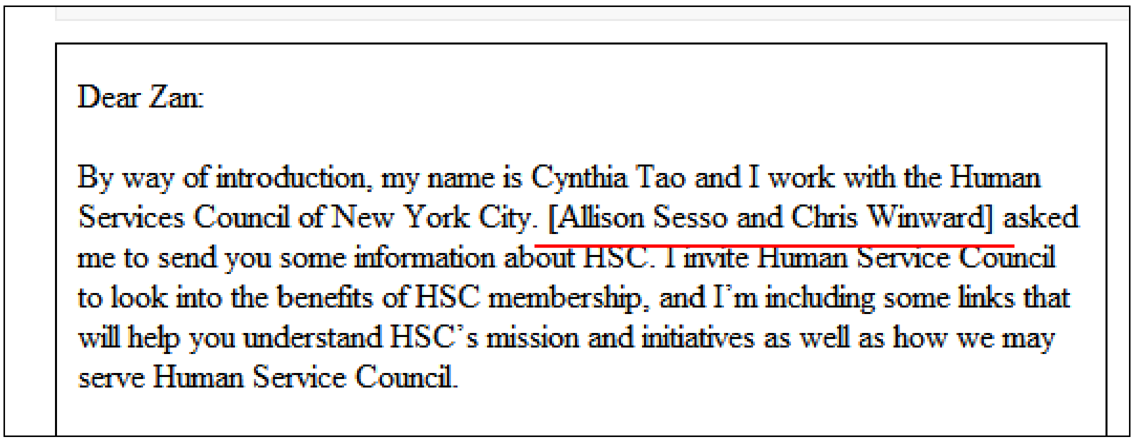
You can click on the box in front of the contact's name to deselect any Contacts you don't wish to include in the mass e-mail.



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

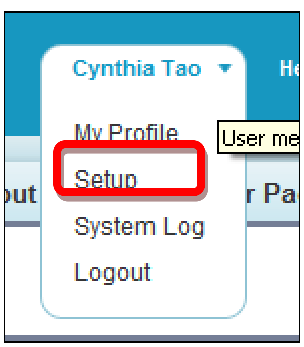
You will see a Folder with a drop-down arrow where you can select a **Template** type. The list of email templates that are that type will appear. Click the circle next to the template you want to use**.** You can click on Preview to see a sample email with the fields filled in.

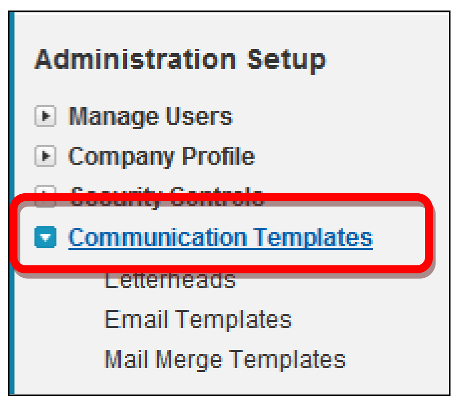
You will see the email filled in with any appropriate information for the recipient, including organization name and address or other fields. Please preview the email and check for bracketed text ([*changeable text]*), which will need to be updated before you send the file.


Dear Zan:

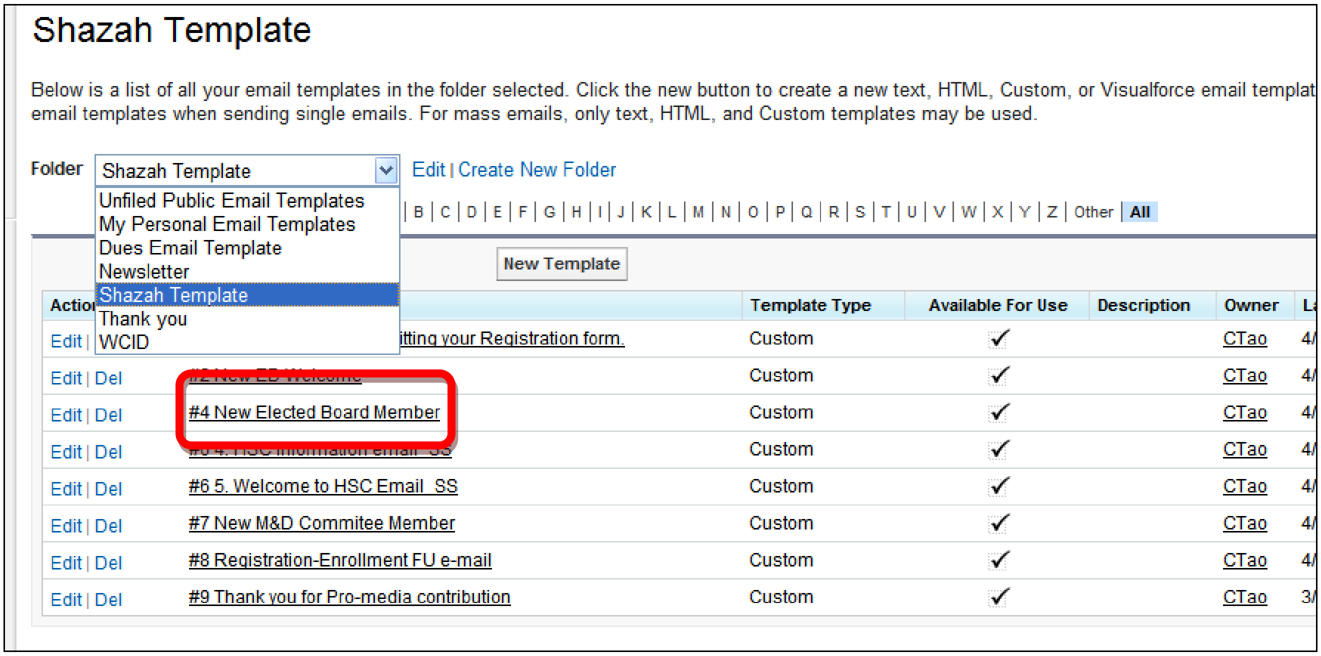
By way of introduction, my name is Cynthia Tao and I work with the Human Services Council of New York City. [Allison Sesso and Chris Winward] asked me to send you some information about HSC. I invite Human Service Council to look into the benefits of HSC membership, and I'm including some links that 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***

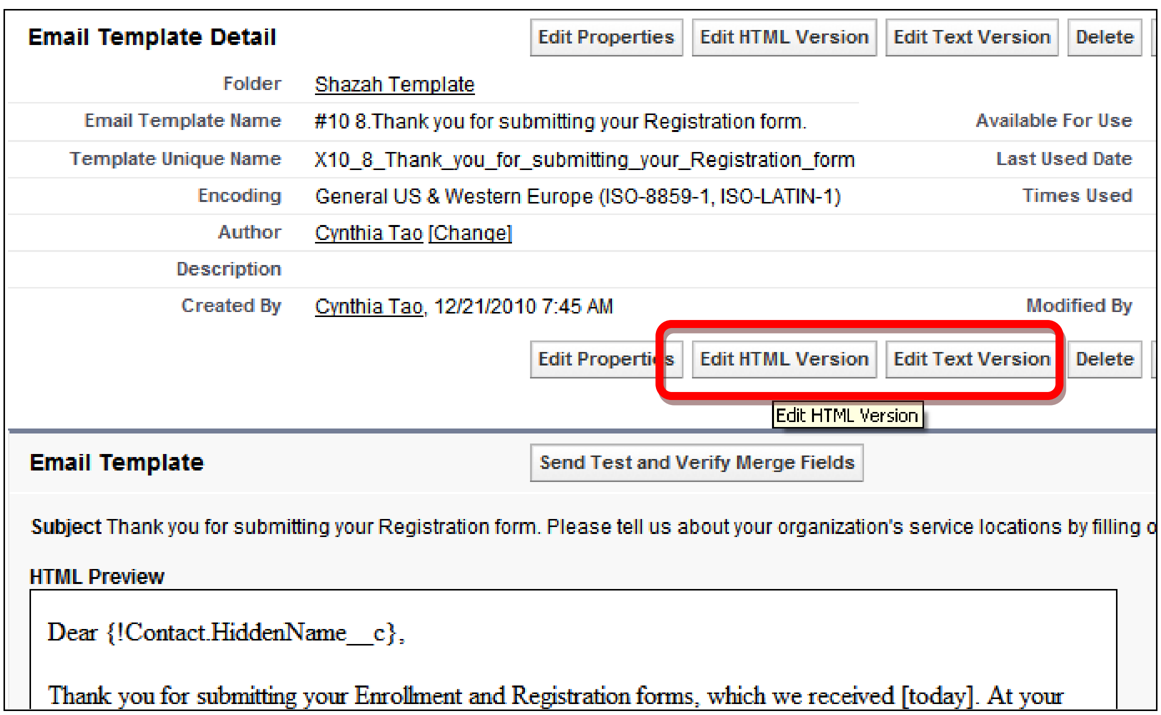




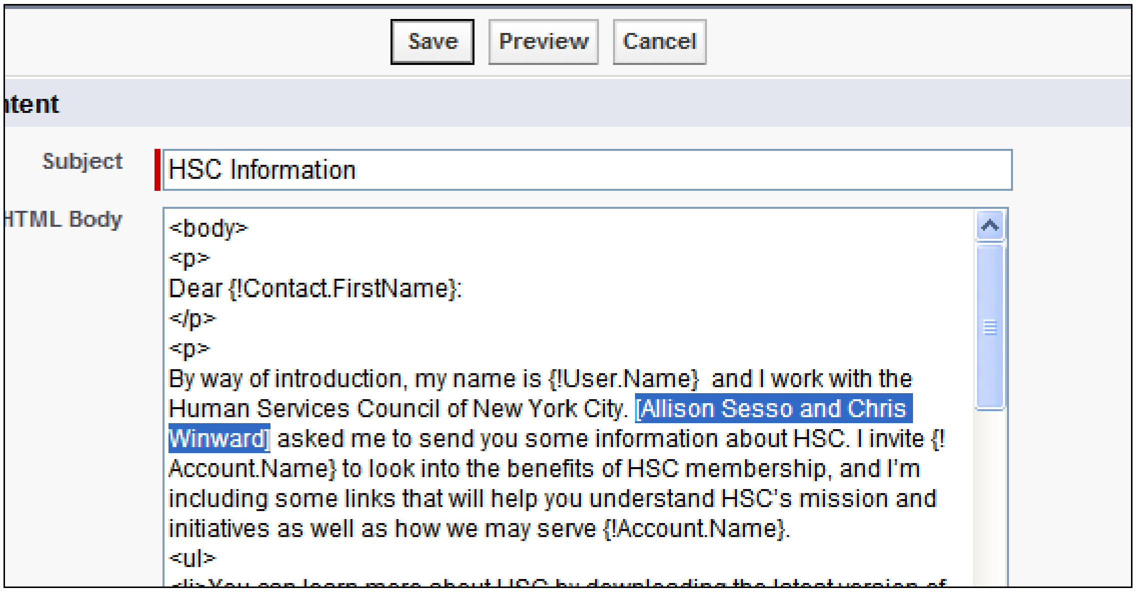
Select the folder containing your template. Click on the template name.



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



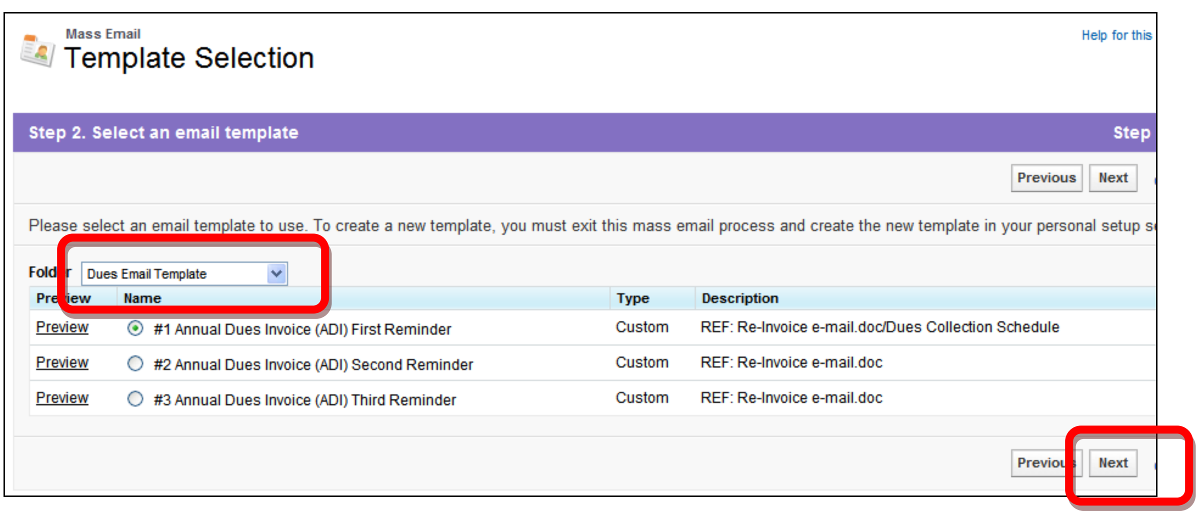
Change the bracketed text. Press the button **Save.**



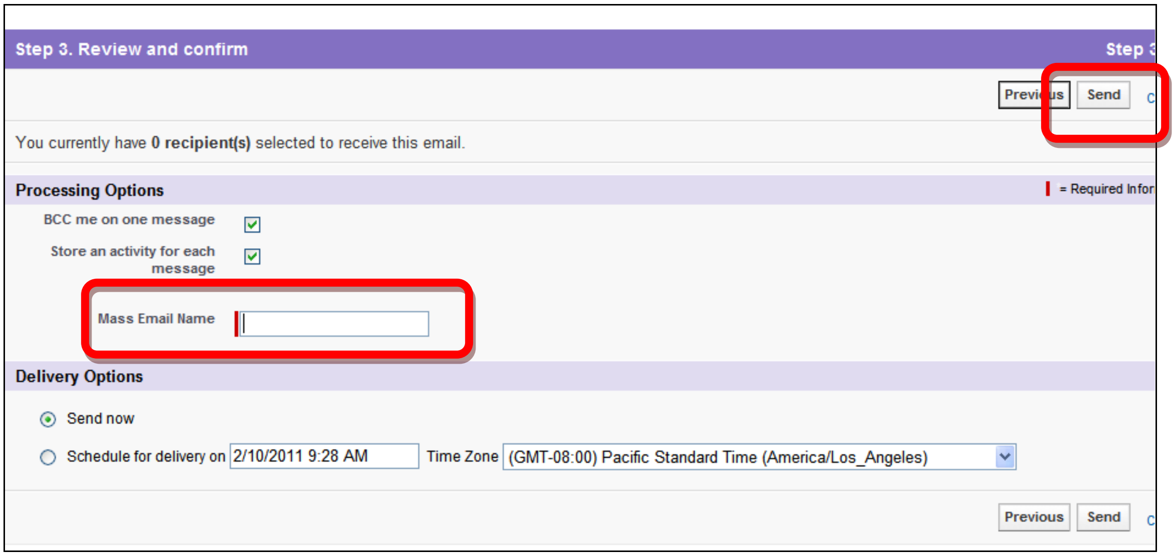
You will be then able to send the e-mail using the updated template.

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

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



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



Note: **<u>Only 250 e-mails can be sent at a time</u>.** 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:

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

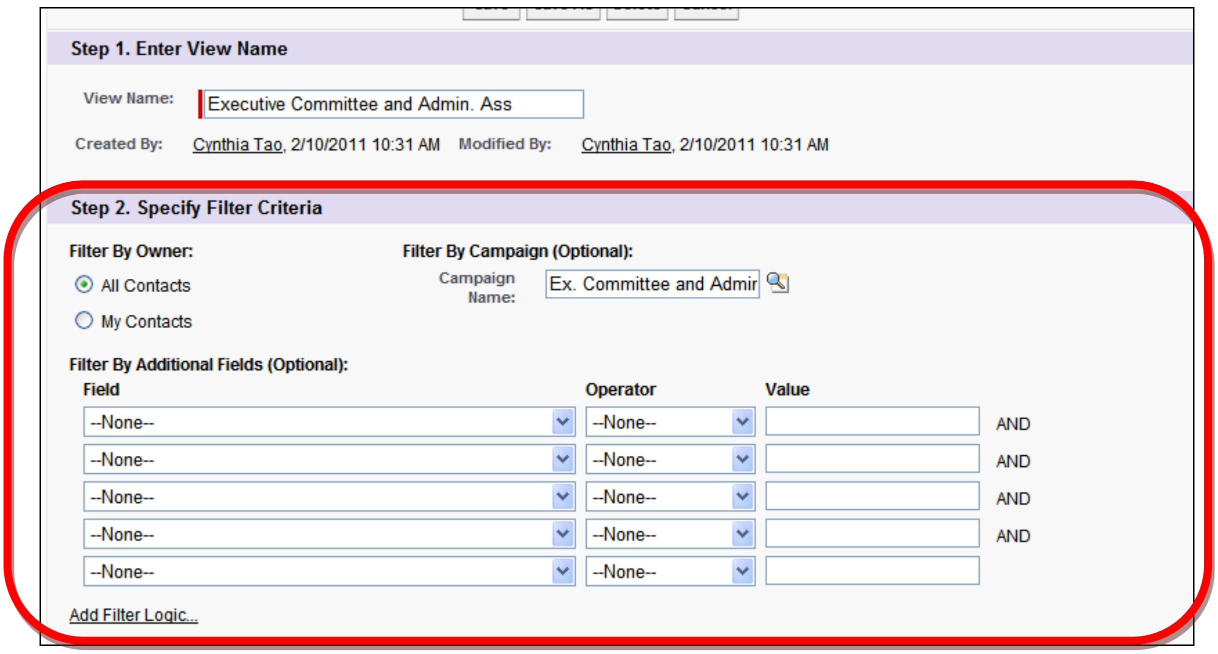
(**Knowledge Article Number: 103741)**

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

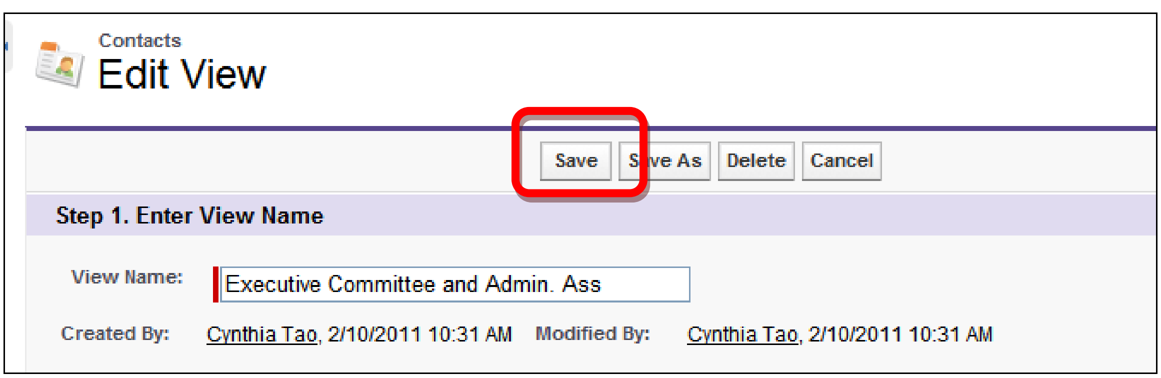
You will need to break your email distribution list into a maximum of 250 names per email by deselecting names – or by filtering the list of names.

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

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



Press **Save.**



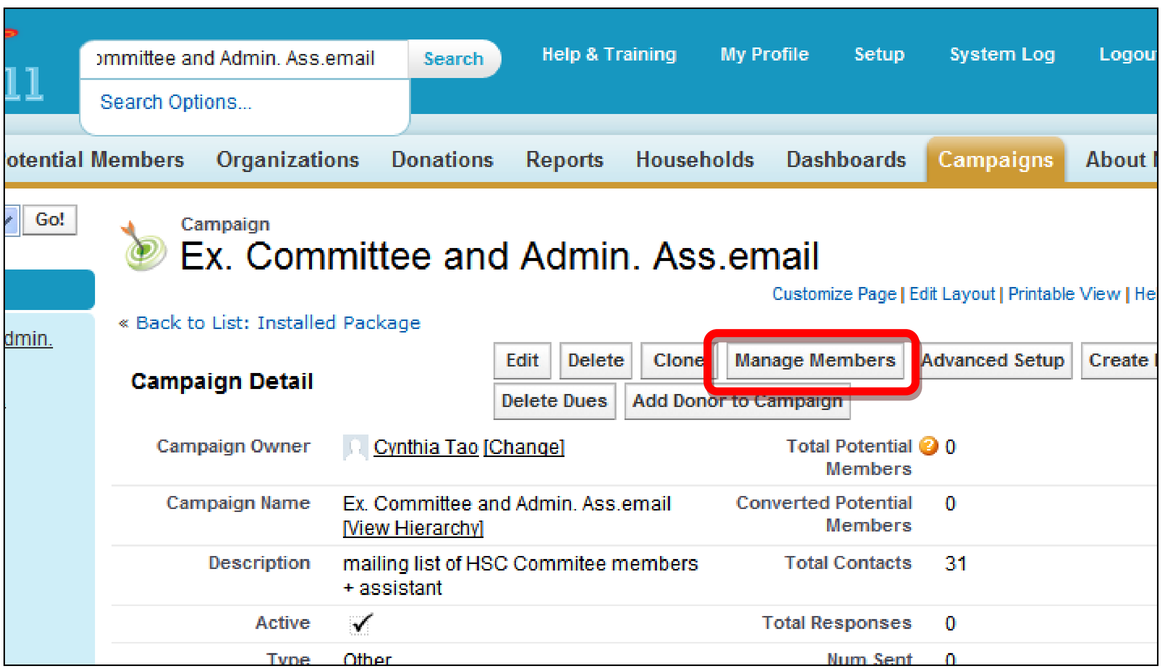
You might find more information about filtering a list of name at https://help.salesforce.com/apex/HTViewHelpDoc?id=reports_filter.htm&language=en

Update Campaign Members

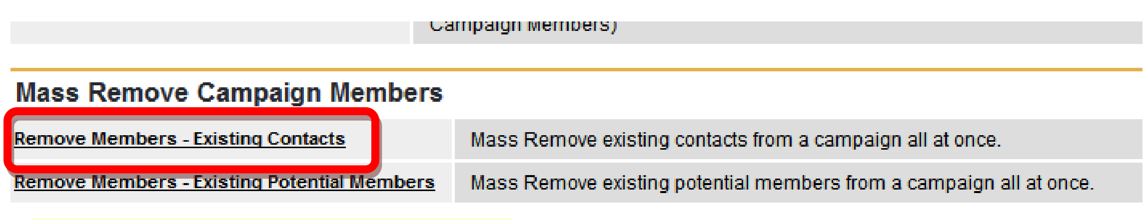
The following paragraph will describe the process to update the lists **Ex. Committee and Admin. Ass. E-mail** and **HSC Board and Admin. Ass. E-mail Campaigns Members.**

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

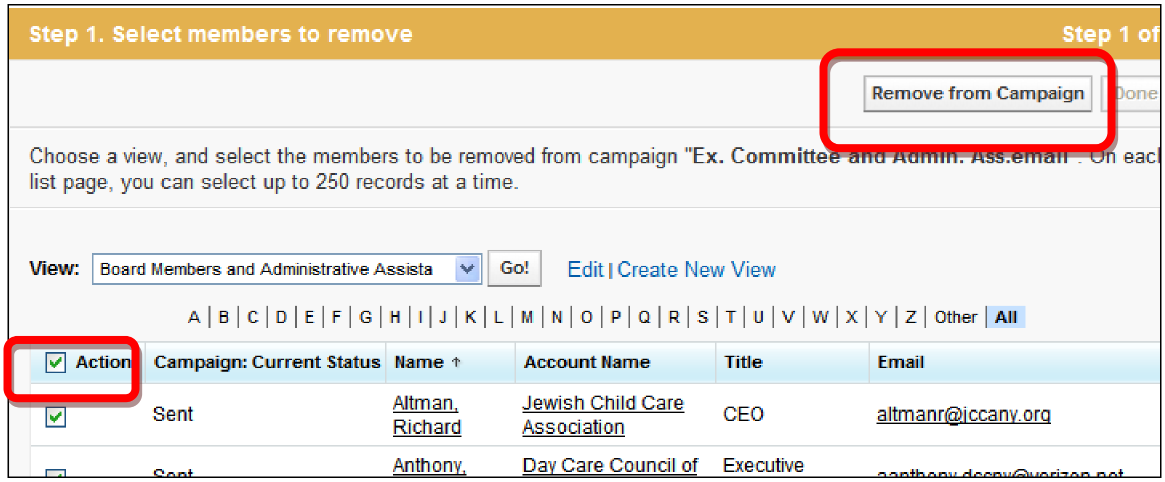
Then press the button **Manage Members.**



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



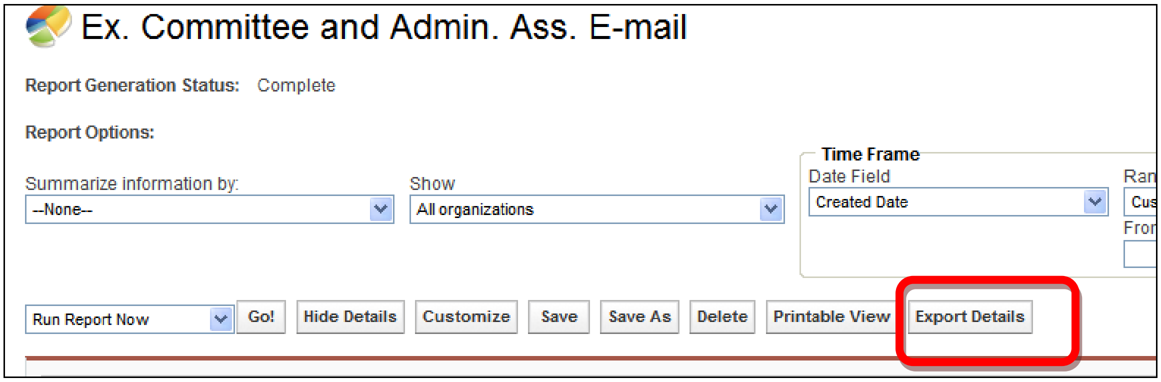
Check the checkbox **Action**, then press the button **Remove from Campaign.**



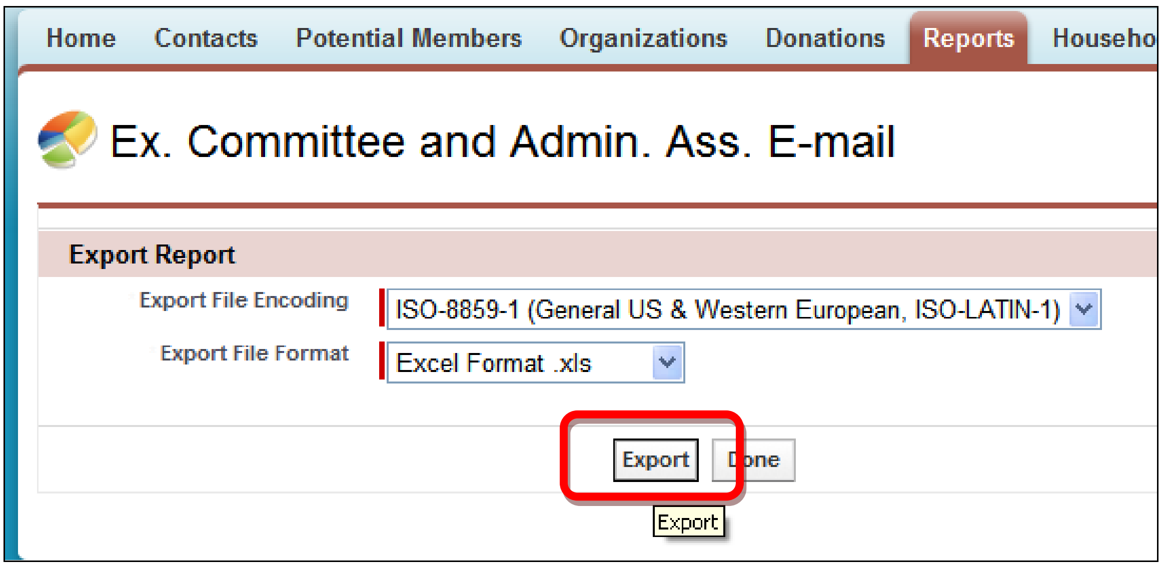
Click on the button **Done**

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

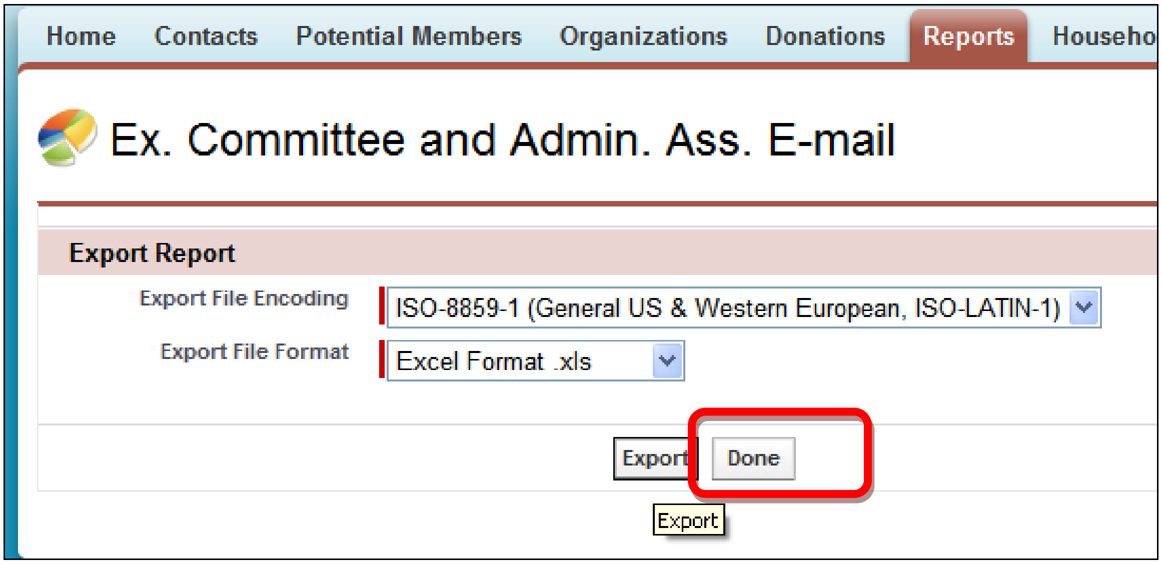
Click on **Export Details**



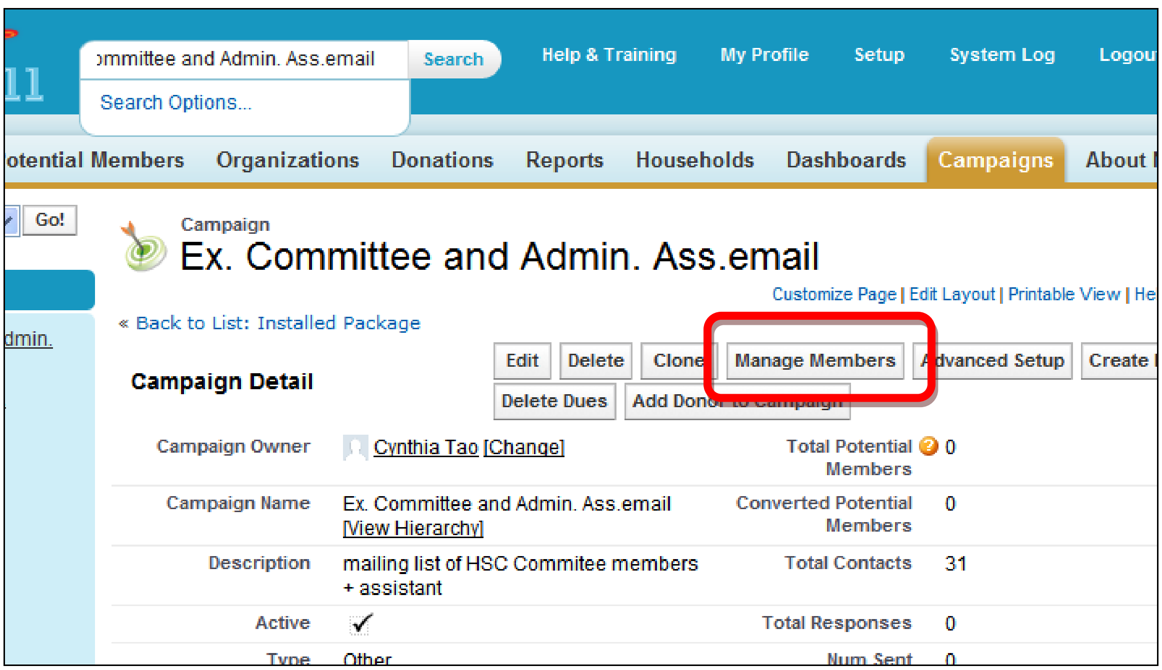
Click on **Export**



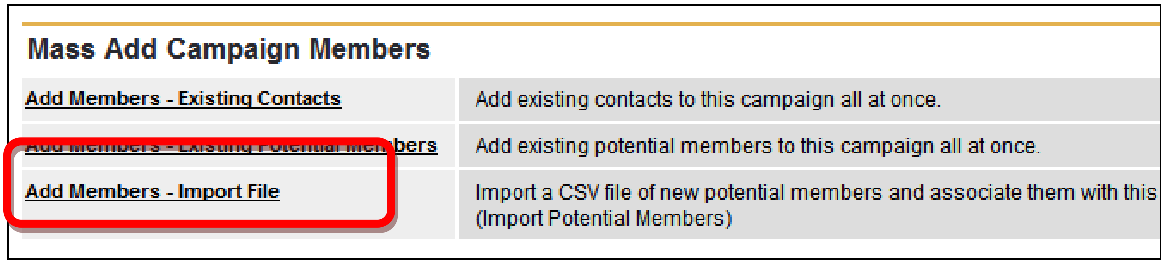
Save the file on your PC. Then Click on the button **Done.**



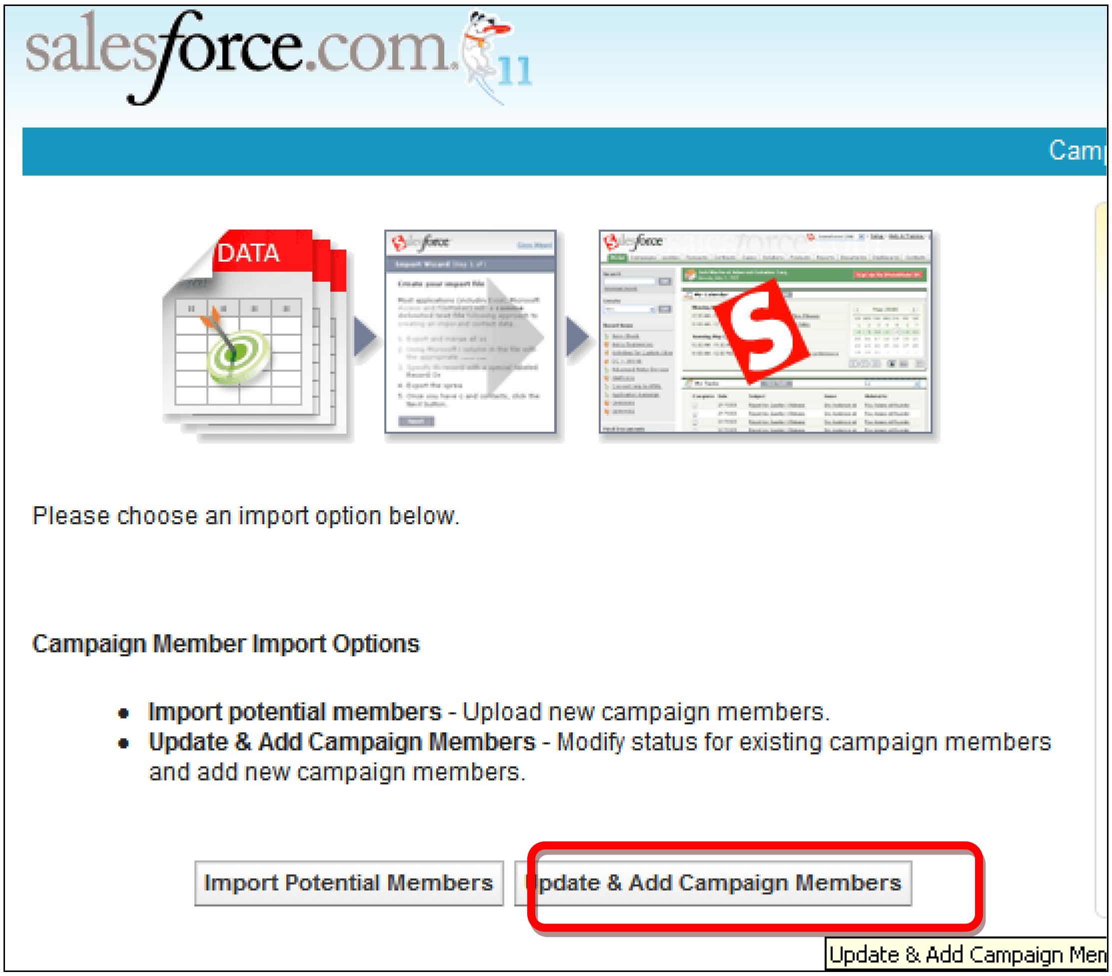
Click again on the button **Manage Members**



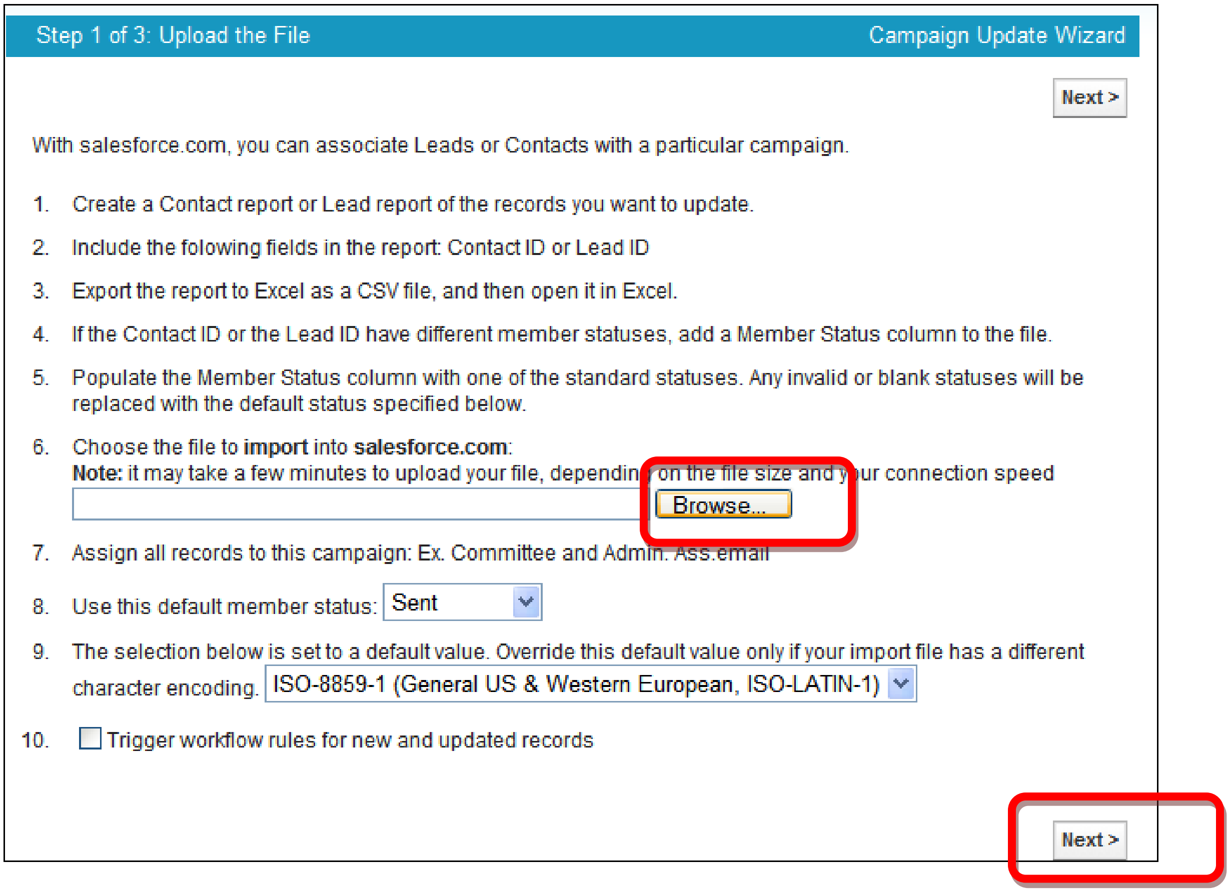
Click on the link **Add Members –Import File**



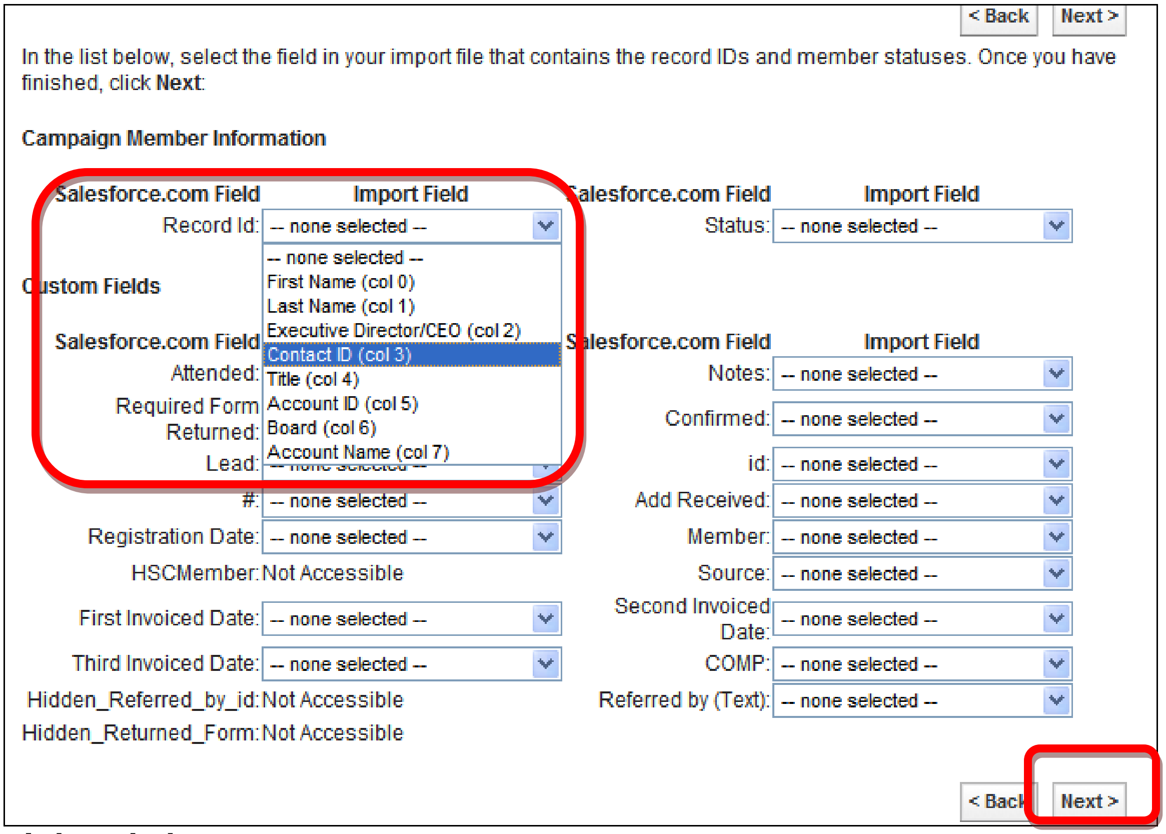
Click on **Update & Add Campaign Members**



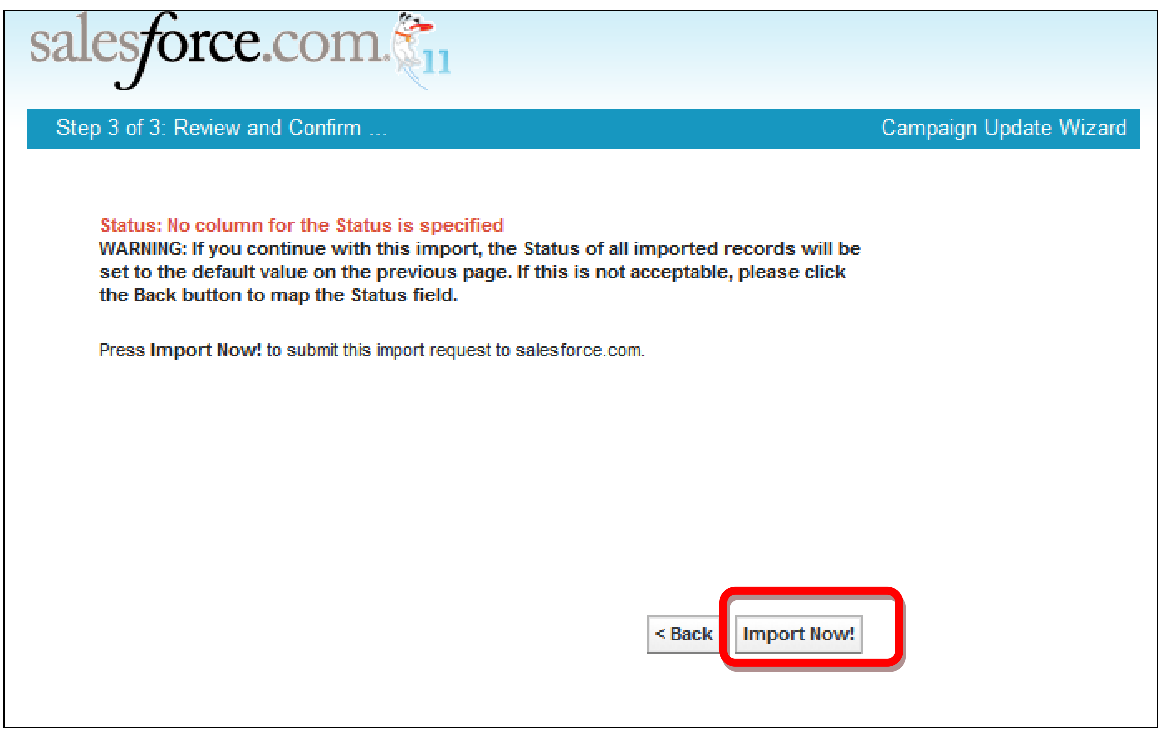
Click on the button **Browse** to import the file you just saved. Then click on **Next.**



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



Click on the button **Import Now.**

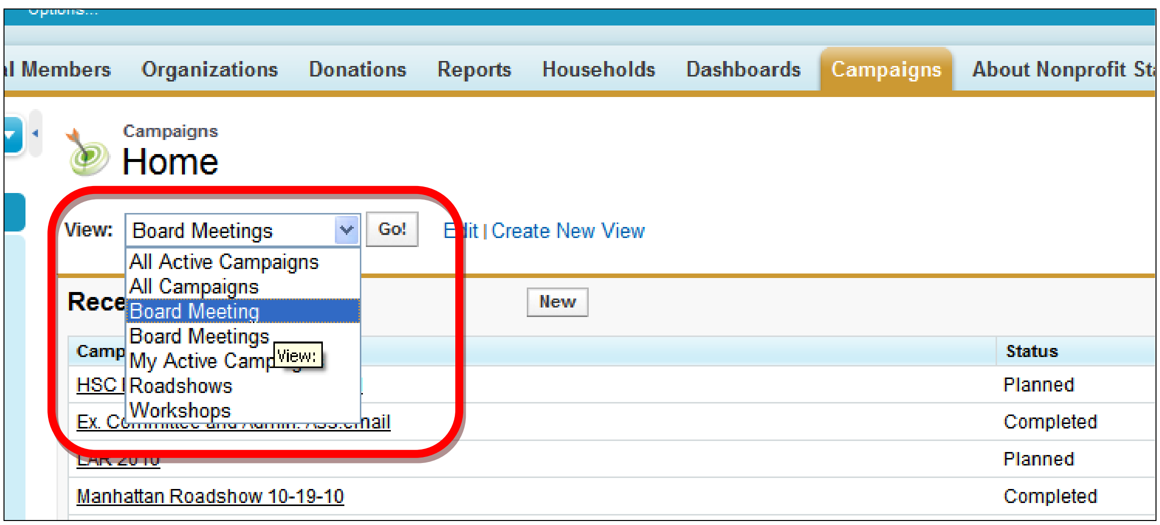


Repeat the same step for the list **HSC Board and Admin. Ass. E-mail Campaigns Members** (Note: The report name for this list under the folder SF System Admin is truncated to **HSC Board and Admin. Ass. E-mail Campaig** as the System doesn't allow long text for Report Name).

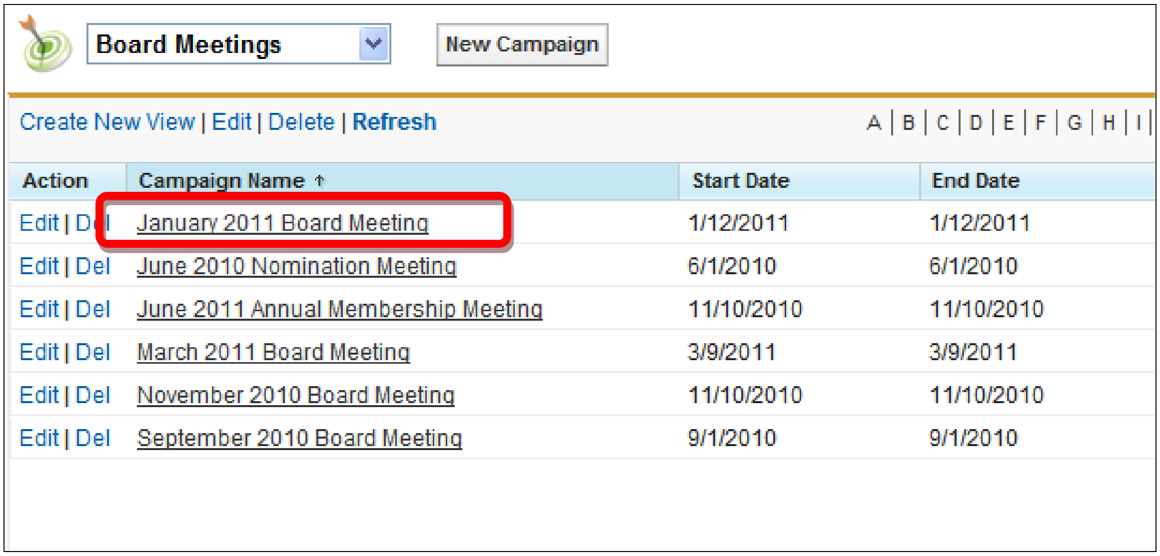
Tracking Board Member Commitments

Board Meeting Attendance or Return of Required Forms

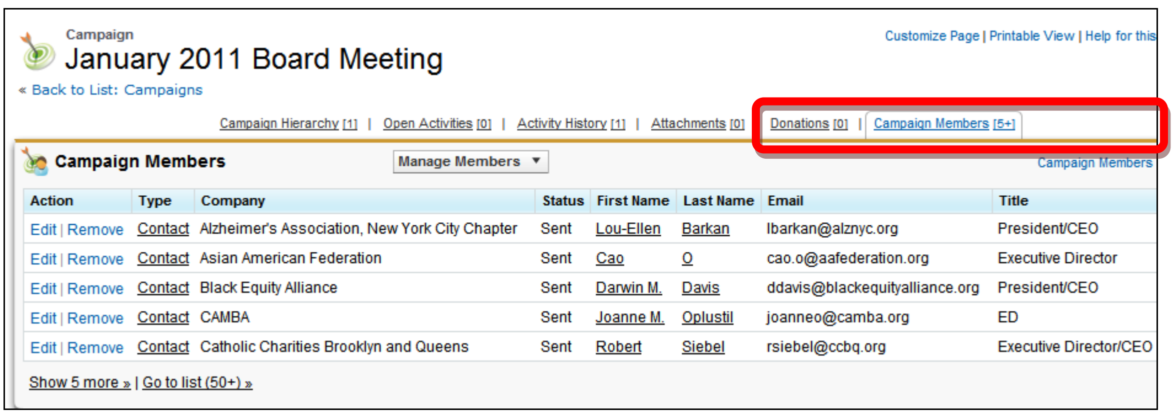
To track Board Member Committee attendance or their return of required Board forms, click on the **Campaigns** tab, click on the down arrow next to View, select **Board Meeting** from the drop-down list, and click **Go.**



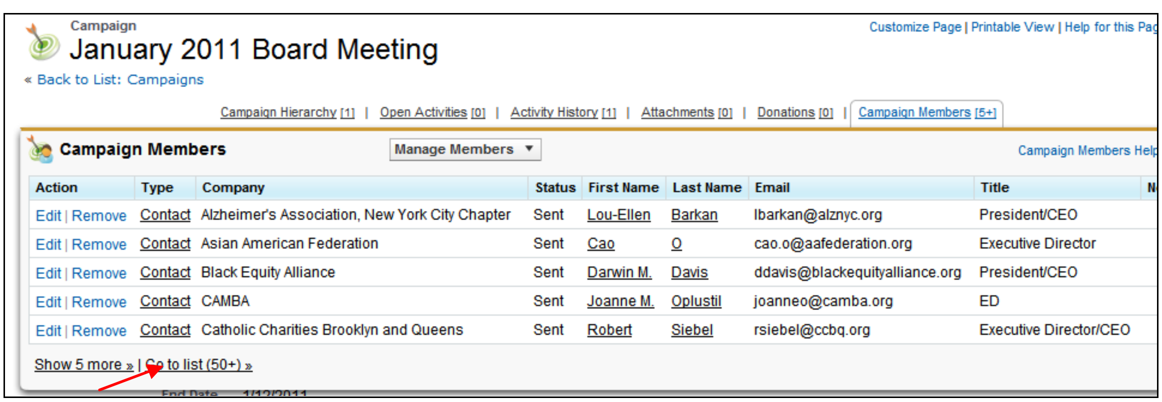
Select the Board Meeting you want to track attendance for by clicking on the item in the **Campaign Name** column.



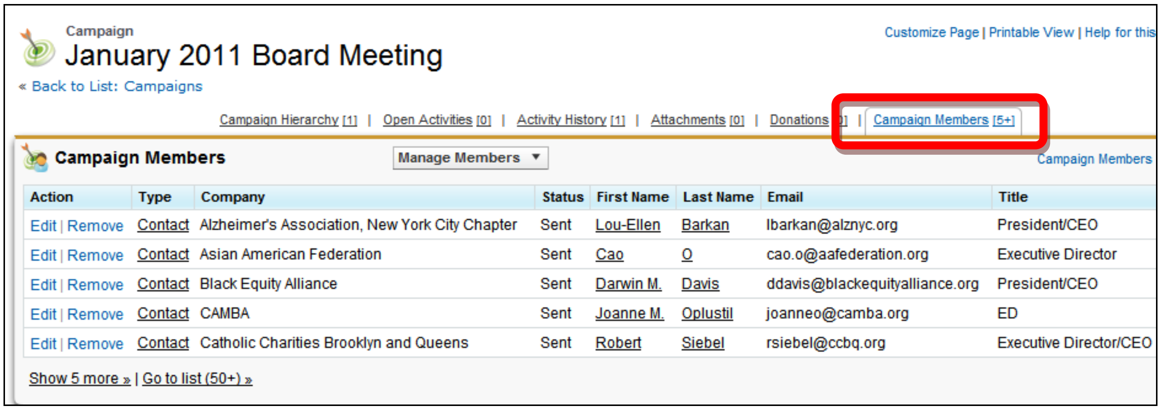
If you move the cursor on the **Campaign Members** link you will see the list of attendees.



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

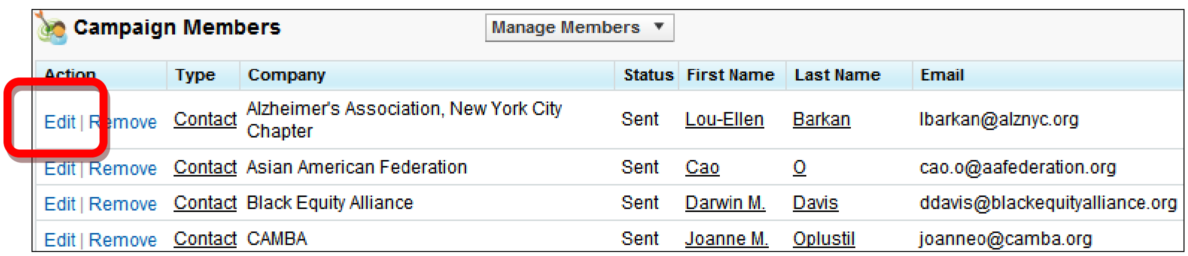


The list is also available at the bottom of the page in the Section **Campaign Members** clicking on the link Campaign Members.



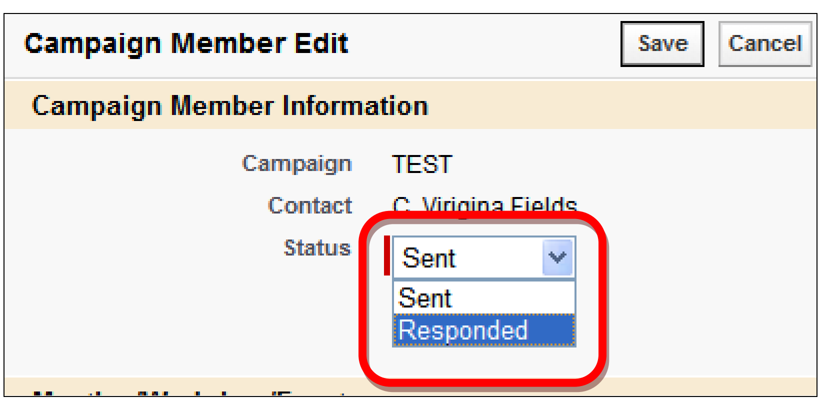
Action	Type	Company	Status	First Name	Last Name	Email	Title
Edit | Remove	Contact	Alzheimer's Association, New York City Chapter	Sent	Lou-Ellen	Barkan	lbarkan@alznyc.org	President/CEO
Edit | Remove	Contact	Asian American Federation	Sent	Cao	O	cao.o@aafederation.org	Executive Director
Edit | Remove	Contact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

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

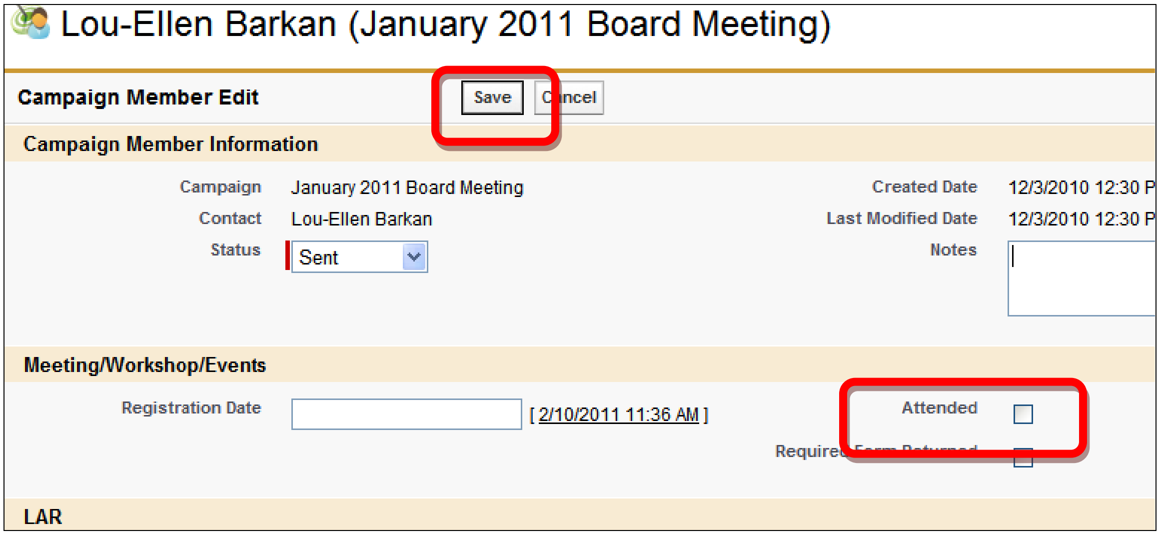


Action	Type	Company	Status	First Name	Last Name	Email
Edit | Remove	Contact	Alzheimer's Association, New York City Chapter	Sent	Lou-Ellen	Barkan	lbarkan@alznyc.org
Edit | Remove	Contact	Asian American Federation	Sent	Cao	O	cao.o@aafederation.org
Edit | Remove	Contact	Black Equity Alliance	Sent	Darwin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

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

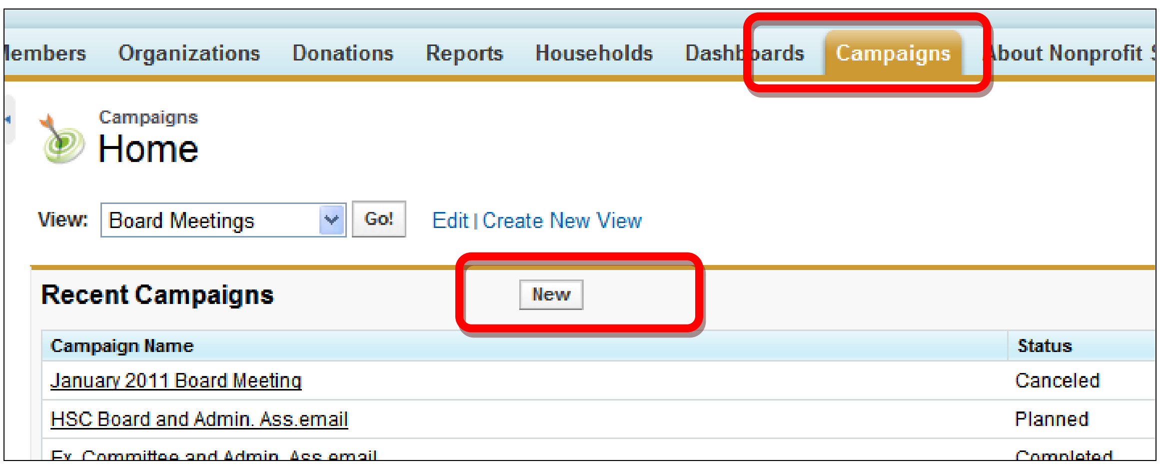


Check the **Attended** box if applicable**,** then click **Save.**



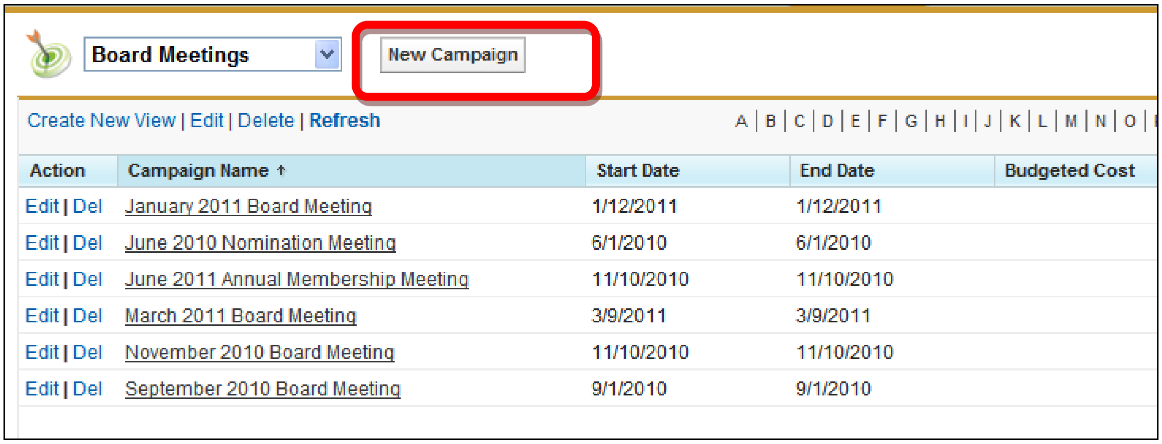
Create a New Board Meeting Campaign Entry

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



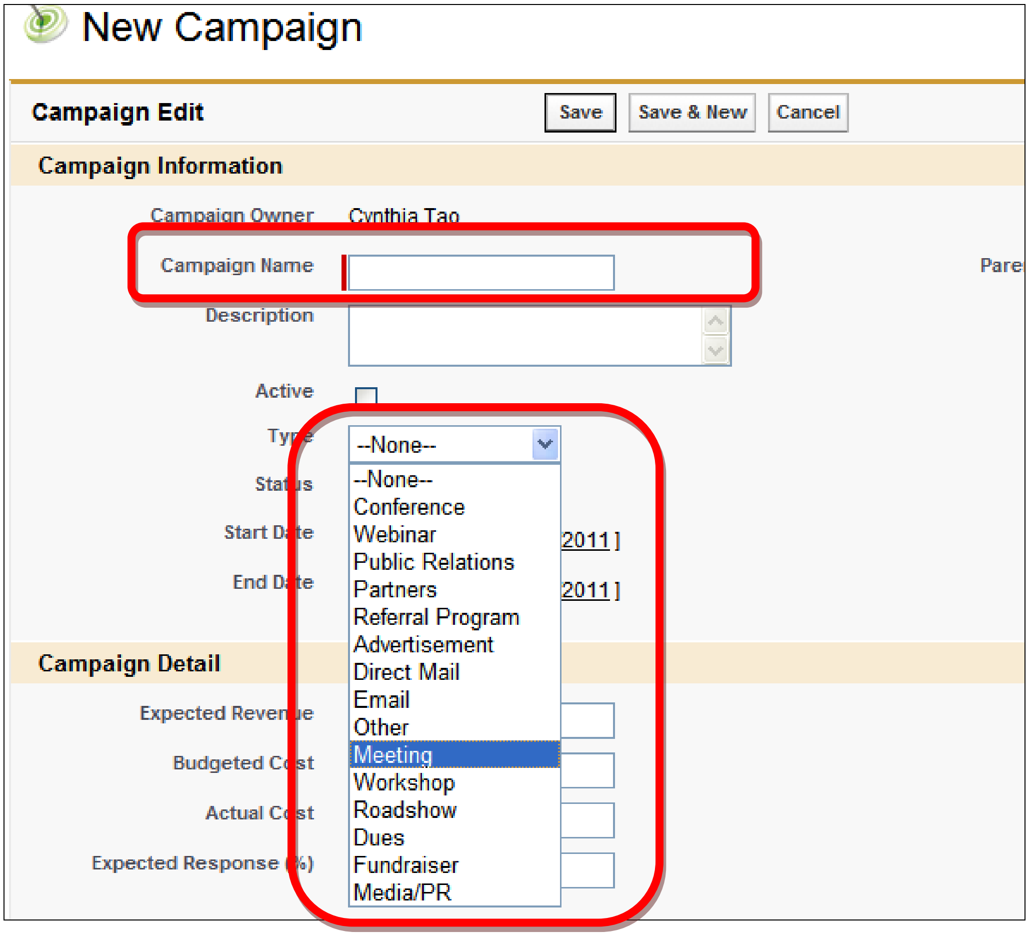
If you select the button **Go!**

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



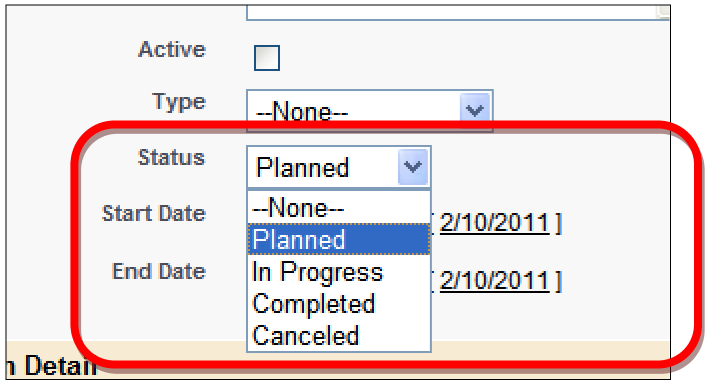
Fill in the fields as necessary.

- 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

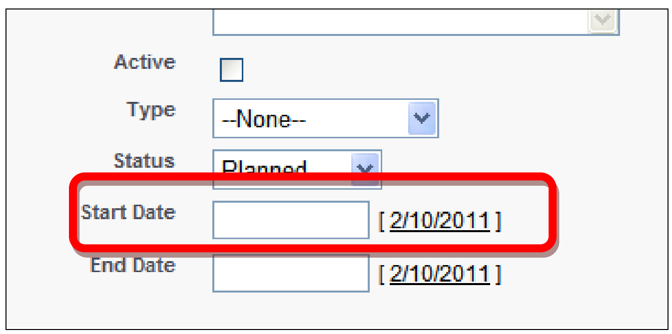


Select the Status

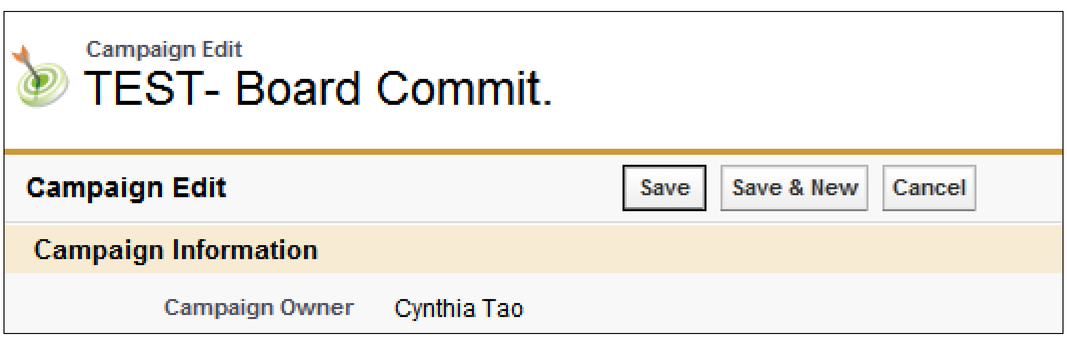
- Planned: for upcoming board meetings
- In Progress (*please ignore this field when dealing with Board Meetings)*
- Completed: for past board meetings
- Canceled



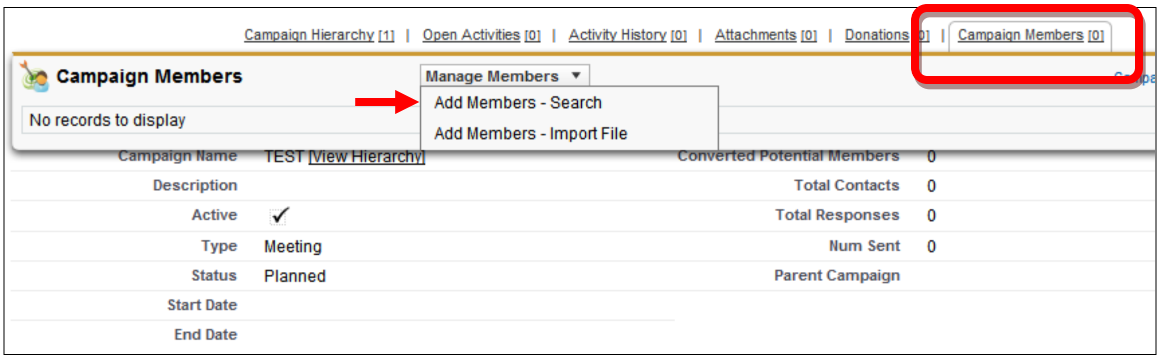
Insert the Start Date (date of the Board Meeting).



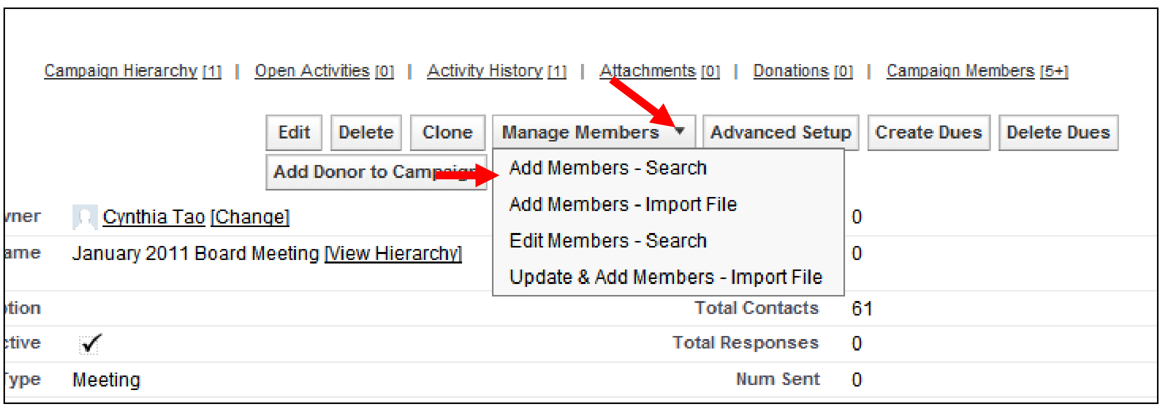
Press **Save. You can leave the rest of the fields blank.**



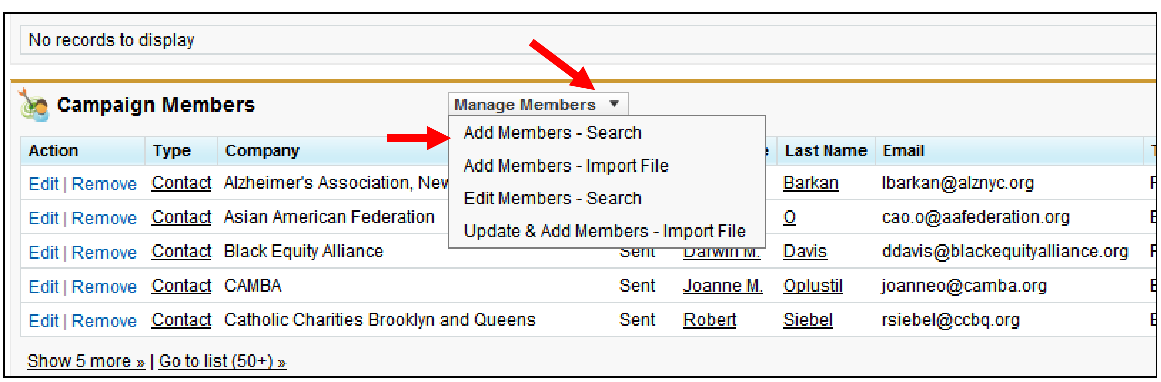
Next, you need to associate members with this campaign. Position the pointer on the **Campaign Members** link, then under **Manage Members** click **Add Members – Search.**



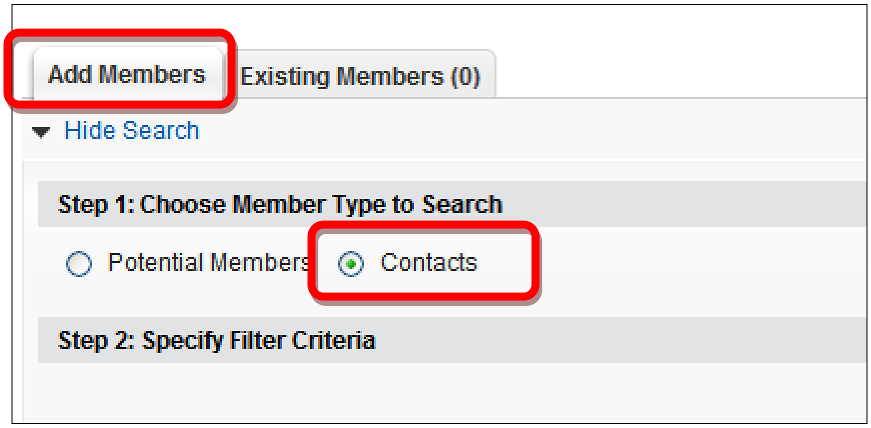
You can also click on the arrow next to the field "Manage Members" on the top of the page and then click on "Add Members –Search".



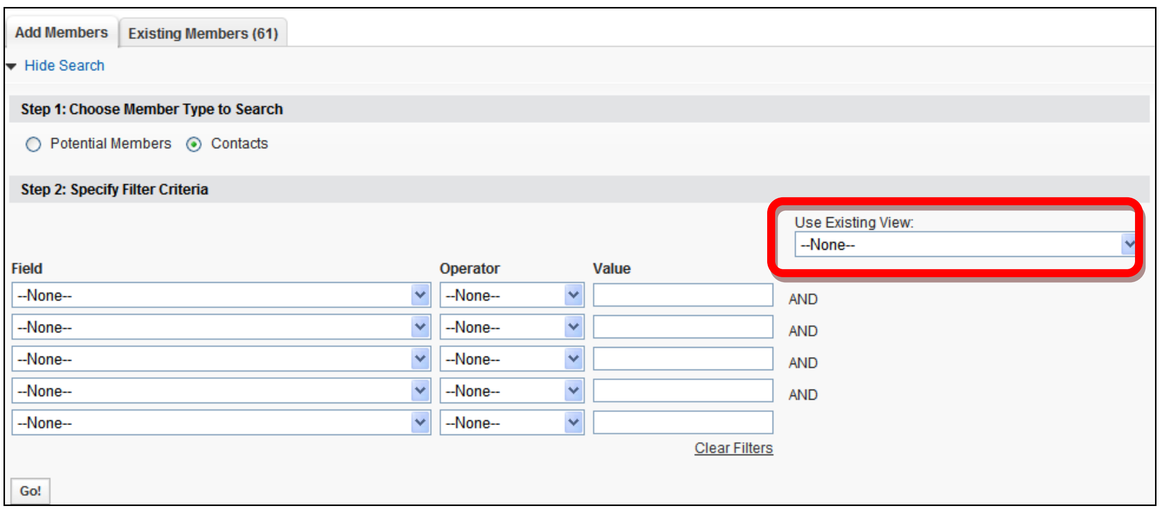
Or you can click on the link **Campaign Members** , click on the arrows close to the field **Manage Members** and then click on **Add Members – Search** on the section **Campaign Member** at the bottom of the page.

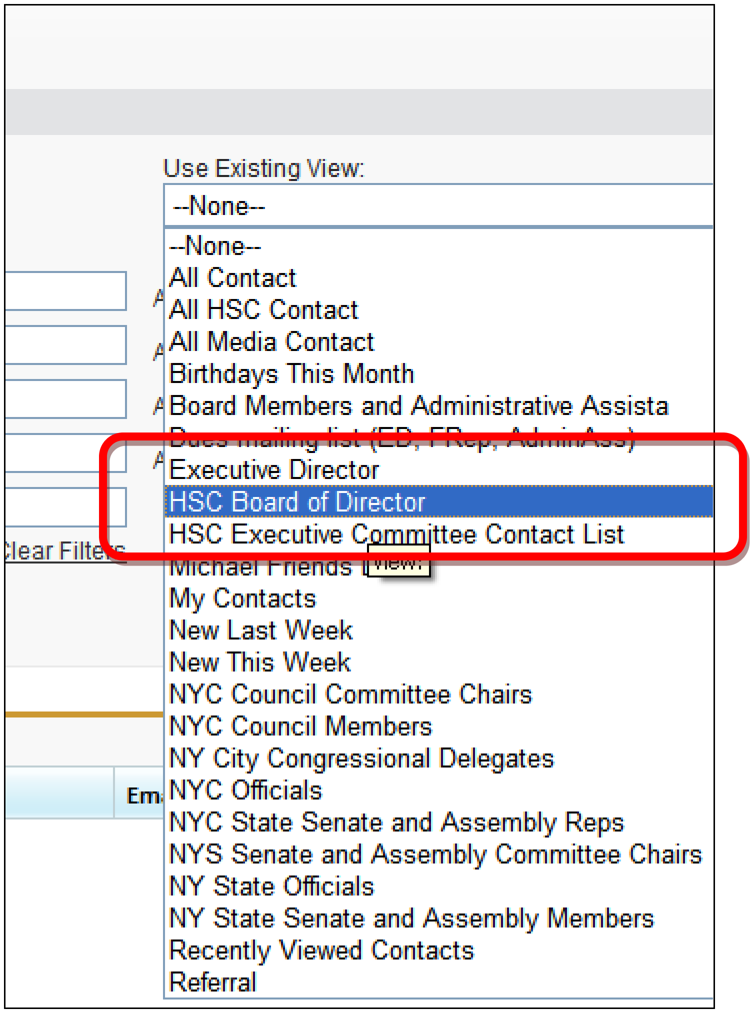


On the **Add Members** tab, select **Contacts.**



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

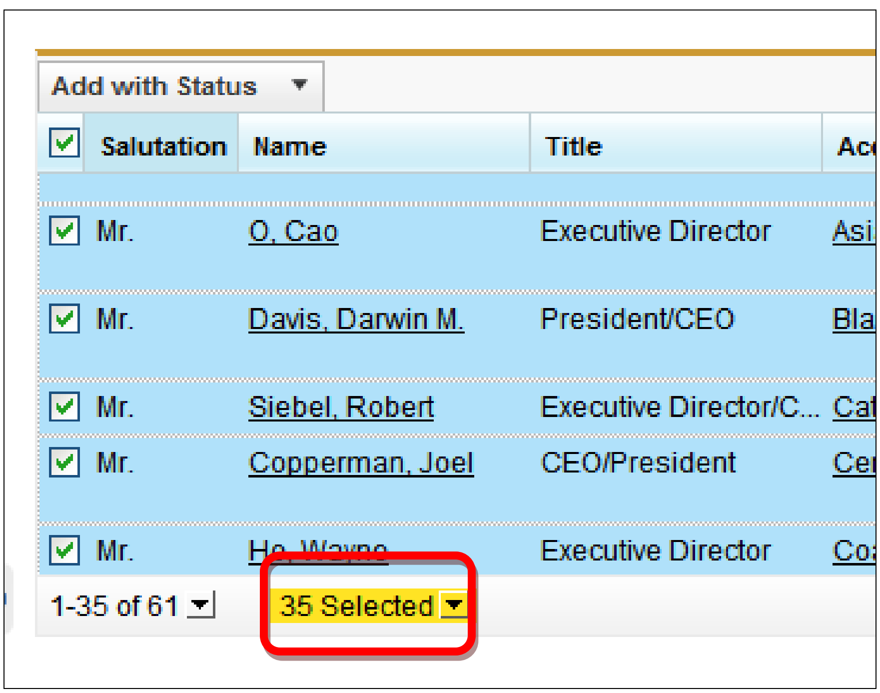




Press **Go** at the bottom of the Step 2 box. A list of the Board Members will appear in the bottom part of the screen.

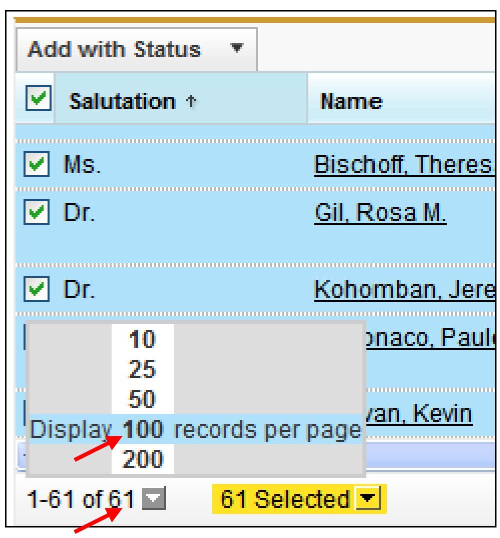
Check the top box (next to **Salutation**, as indicated below) to select all displayed contacts. The number highlighted in yellow at the bottom of the screen shows the number of records selected.

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).



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

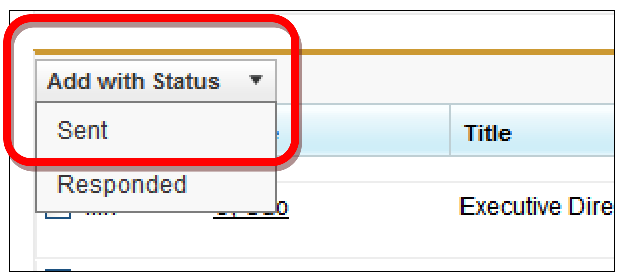
Then select the number that exceeds the total number of records (in the example shown below the total number of records is 61 so the number to be selected is 100).



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.

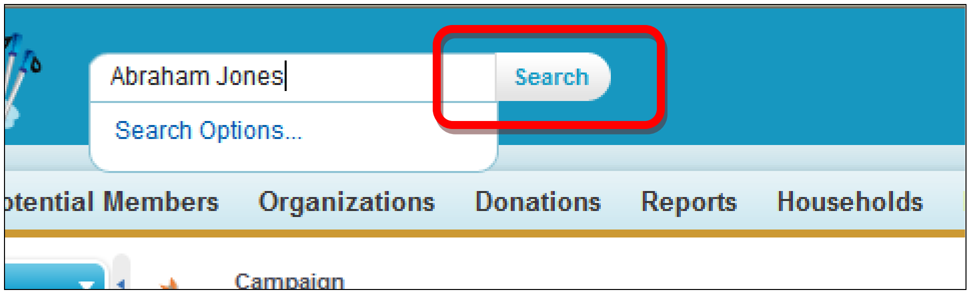
To associate the entire list of Board Members with this campaign, click on the down arrowhead in the **Add with Status** box. Select **Sent** in the **Add with Status** drop-down list.



Tracking Leadership Awards Reception (LAR) Pledges

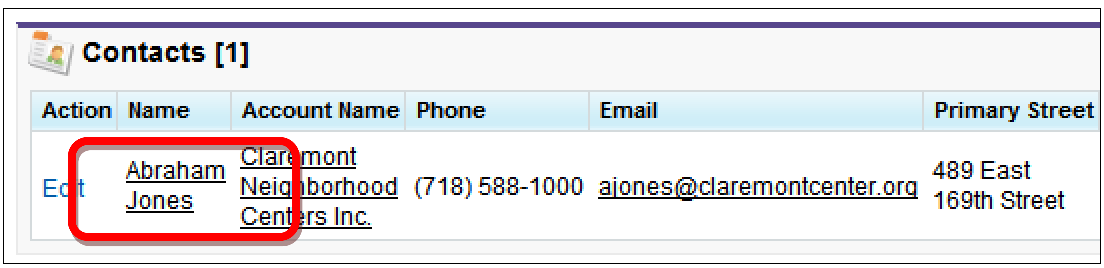
Create LAR donation, contribution, tickets/advertisement purchase

Type the name of the person who made a contribution, or a donation, or a tickets/add purchase in the Sidebar **Search.** Press the **Search** button.

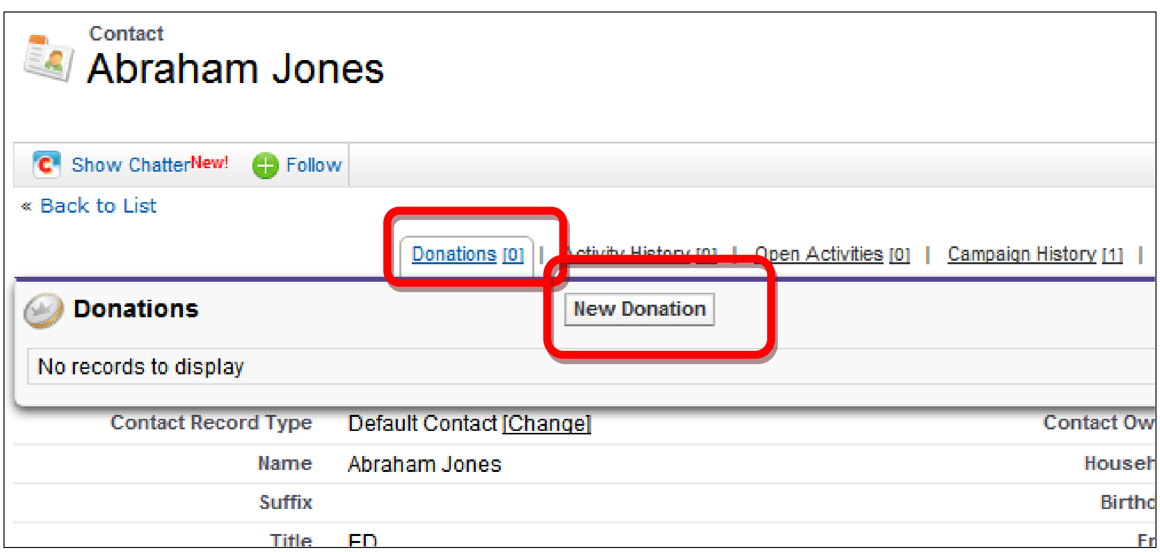


If the function **Search** will not retrieve any result you need to create a new Contact (see section **How to Create or Update an HSC Member Contact).**

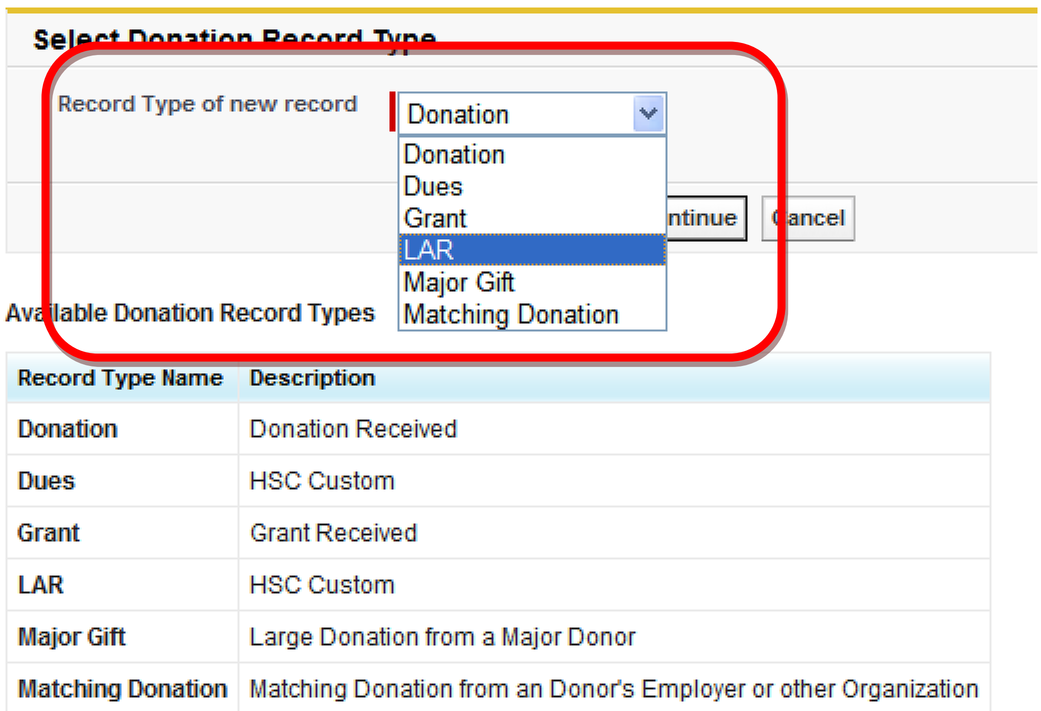
Click on the **Name** link



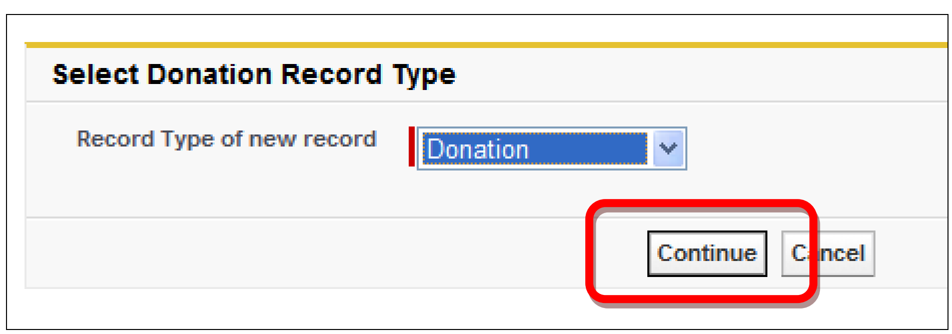
Place the cursor over the **Donations** link and a window will appear; press the button **New Donation.**



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



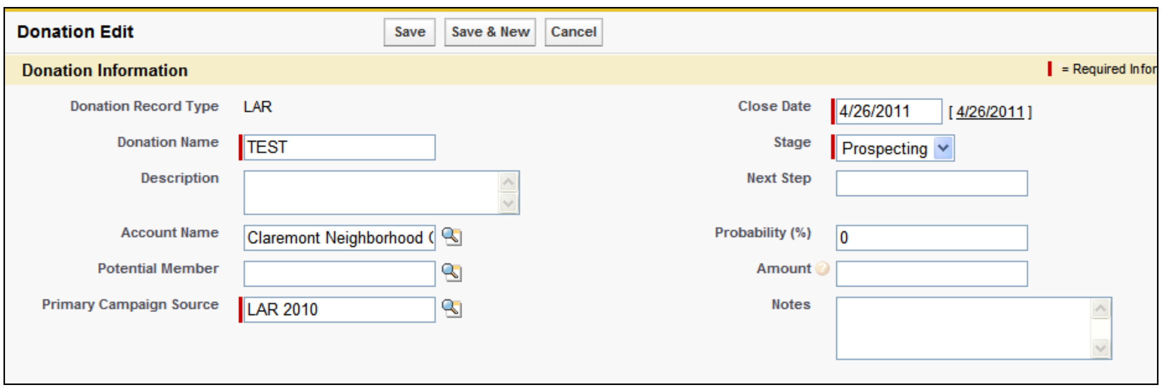
Press the **Continue** button.



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.



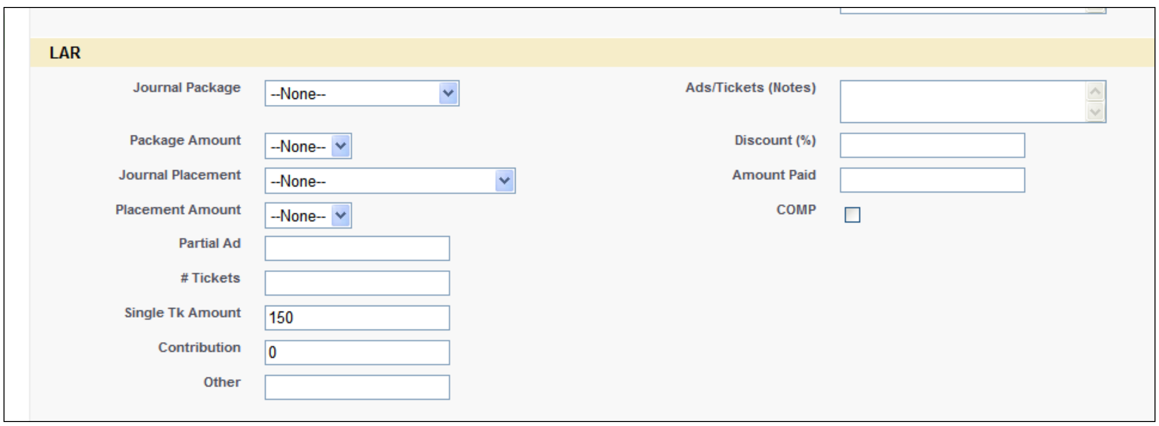
The field **Account Name** (Contact’s Organization) will be updated automatically by the System if the Donor is a Contact (e.g. HSC Contact Member). If the LAR Donor is an Individual, in the field **Account Name** will be updated his/her Last Name and First Name.

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.

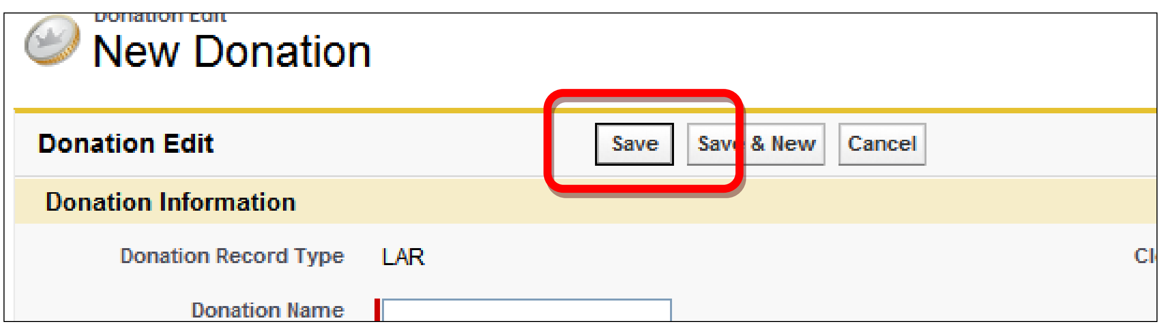
Complete the LAR section, as appropriate.

- 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



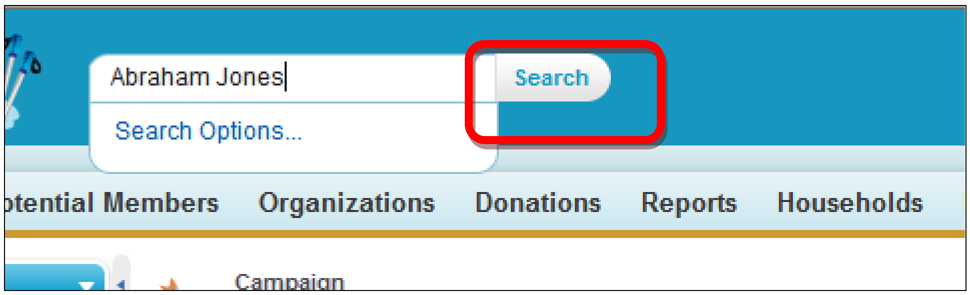
Press **Save.**



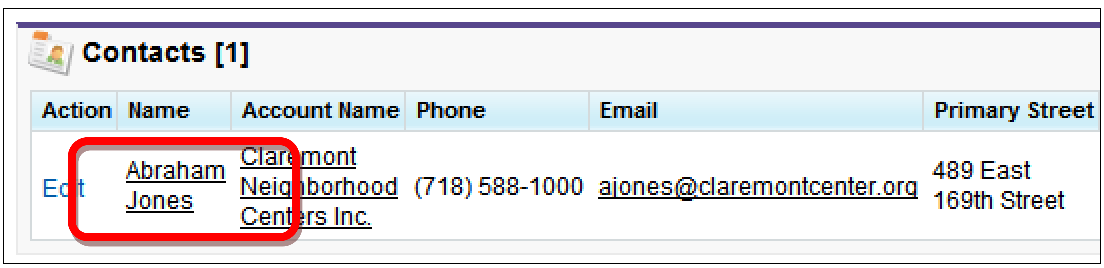
Update a LAR donation, contribution, tickets/add purchase

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

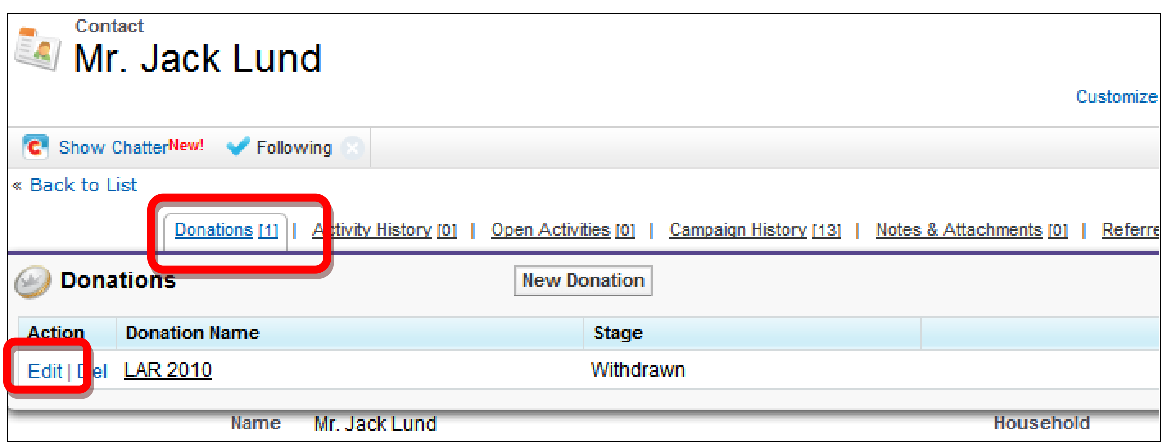
Type the Contact Name and press **Search**



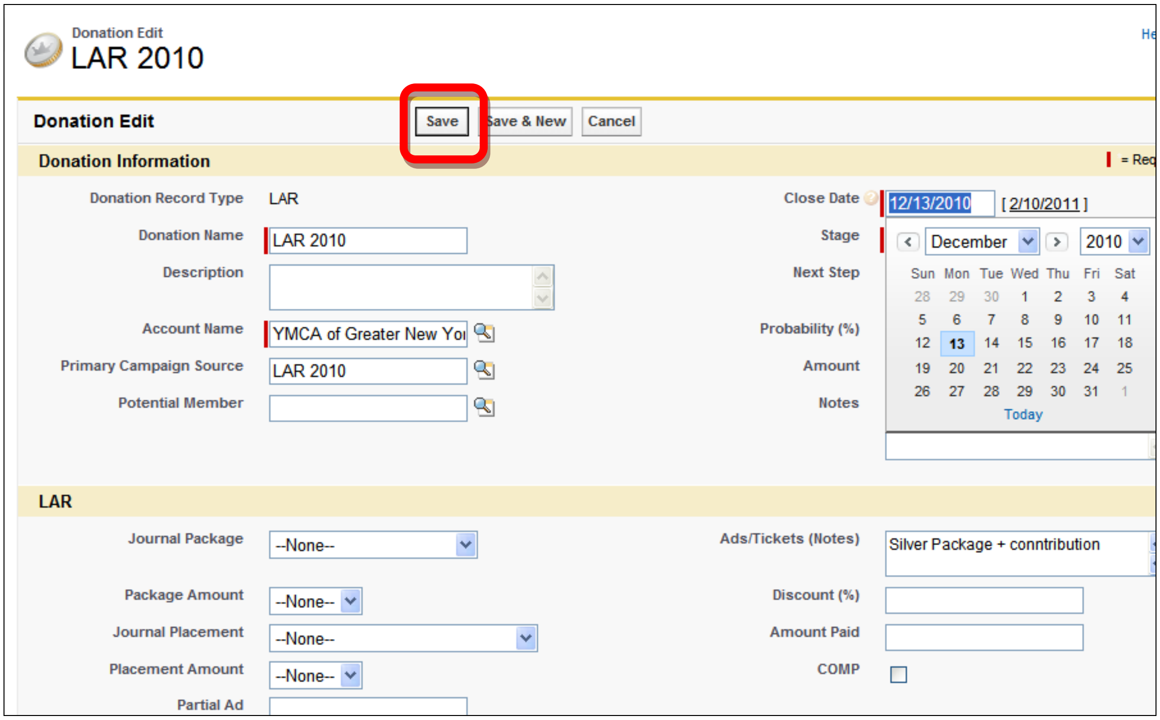
Click on the **Name** link



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.



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.

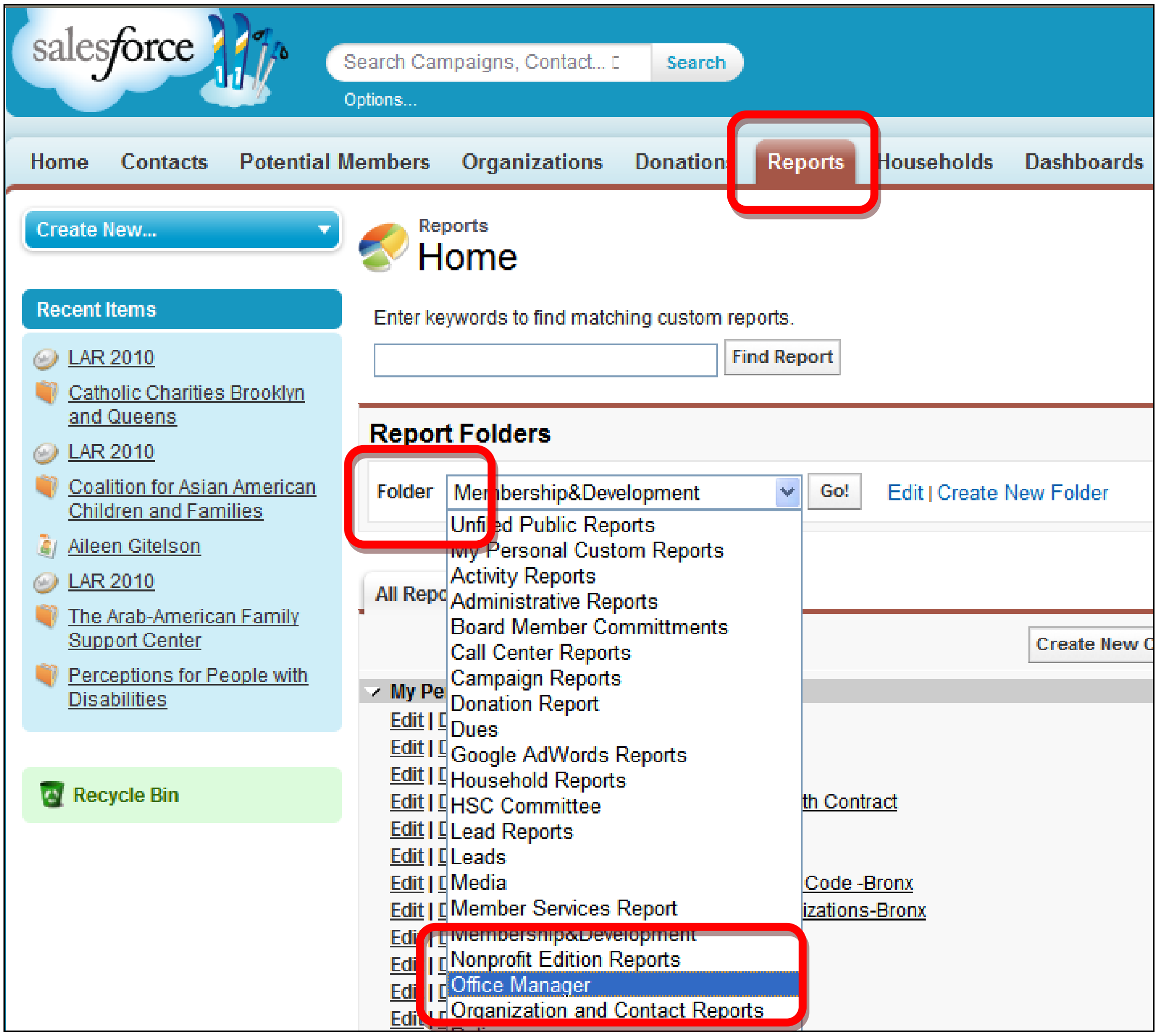


Finding and Running Reports

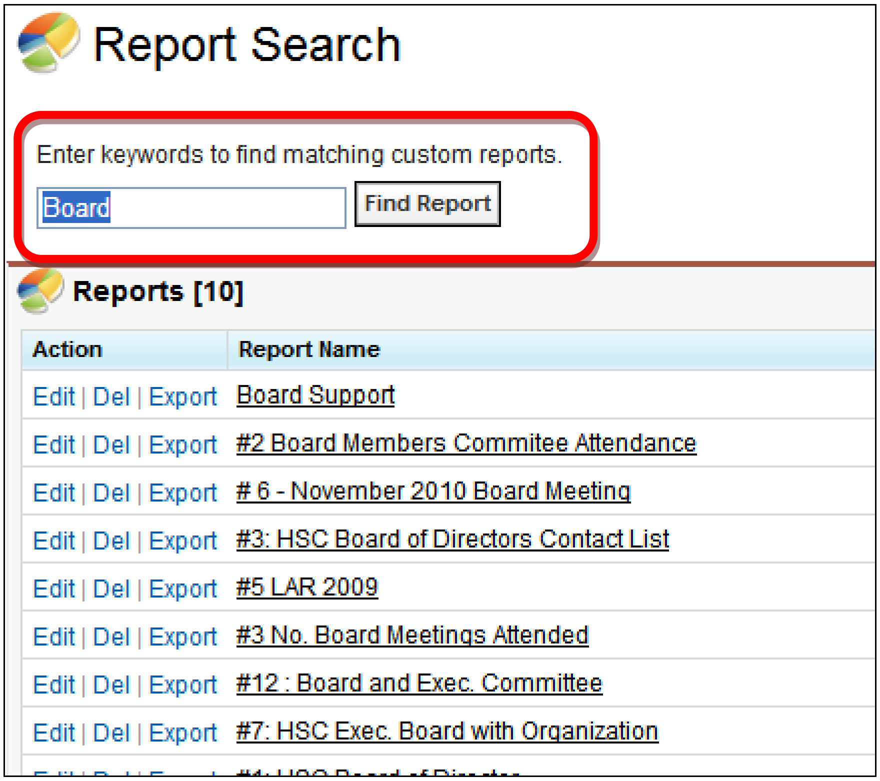
Several types of reports were created and stored already in the Salesforce database for the Office Manager task.

Finding Office Manager Reports

To access the reports clickm 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 .



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

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.

<u>Folder Office Manager</u>

- **#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
Alzheimer's Association, New York City Chapter	Ms.	Lou-Ellen	Barkan	☐
American Red Cross in Greater New York	Ms.	Theresa	Bischoff	☐
Asian American Federation	Mr.	Cao	O	☐
Black Equity Alliance	Mr.	Darwin M.	Davis	☐
CAMBA	Ms.	Joanne M.	Oplustil	✓
Catholic Charities Brooklyn and Queens	Mr.	Robert	Siebel	✓
Catholic Charities of the Archdiocese of New York	Msgr.	Kevin	Sullivan	✓
Center for Alternative Sentencing and Employment Services	Mr.	Joel	Copperman	✓

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

Theresa	Bischoff	CEO	American Red Cross in Greater New York	520 West 49th Street New York, NY 10019
Cao	O	Executive Director	Asian American Federation	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: Alzheimer's Association, New York City Chapter **(2 records)**						
Jackie Zapata	☐	Administrative Assistant	jzapata@alznyc.org	(646) 744-2907	(646) 744-2907	-
Lou-Ellen Barkan	✓	President/CEO	lbarkan@alznyc.org	(646) 744-2901	(646) 744-2901	-
Account Name: Asian American Federation **(2 records)**						
Lina Kim	☐	Administrative Assistant	lina.kim@aafederation.org	-	-	-
Cao O	✓	Executive Director	cao.o@aafederation.org	(212) 344-5878	(212) 344-5878	-
Account Name: Black Equity Alliance **(2 records)**						
Norley Nortey	☐	Administrative Assistant	nnortey@blackequityalliance.org	(212) 251-2420	-	-
Darwin M. Davis	✓	President/CEO	ddavis@blackequityalliance.org	(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
Nancy	Wackstein	Executive Director	United Neighborhood Houses of New York	70 West 36th Street 5th Floor New York, NY 10018
Frederick	Shack	Executive Director	Urban Pathways	575 8th Avenue 9th Floor New York, NY 10018
Joanne M.	Oplustil	ED	CAMBA	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: CAMBA **(2 records)**						
☐	Lorelie Lombardo	Administrative Assistant	loreliel@camba.org	(718) 287-2600	(718) 287-2600	x 228
✓	Joanne M. Oplustil	ED	joanneo@camba.org	(718) 287-2600	(718) 287-2600	ext. 228
Account Name: Catholic Charities Brooklyn and Queens **(2 records)**						

☐	Hunte LaFerne	Administrative Assistant	lhunte@ccbq.org	-	-	-
✓	Robert Siebel	Executive Director/CEO	rsiebel@ccbq.org	(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
Nancy	Wackstein	Executive Director	United Neighborhood Houses of New York
Frederick	Shack	Executive Director	Urban Pathways
Joanne M.	Oplustil	ED	CAMBA

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

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

Account Name
Child Care, Inc.
Mental Health Association of New York City
United Way of New York City
Jamaica Service Program for Older Adults
YWCA of Queens
Bronx House

- **#10: Full Member with EDs**

List of HSC member organizations with ED names only.

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

- **#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
Agenda for Children Tomorrow	Ms.	Linda	Selvin	linda.selvin@dfa.state.ny.us
Aging in America Community Service	Ms.	Judith	Richburg	jrichburg@aiamsh.org
Alzheimer's Association, New York City Chapter	Ms.	Lou-Ellen	Barkan	lbarkan@alznyc.org
American Group Psychotherapy Association	Ms.	Marsha	Block	mblock@agpa.org

- **#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

Account Name	Alzheimer's Association, New	Asian American Federation

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

- **#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

Account Name	YWCA of the City of New York	You Gotta Believe!	YMCA of Greater New York
Salutation	Ms.	Mr.	Mr.

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

Running LAR Reports

Folder LAR

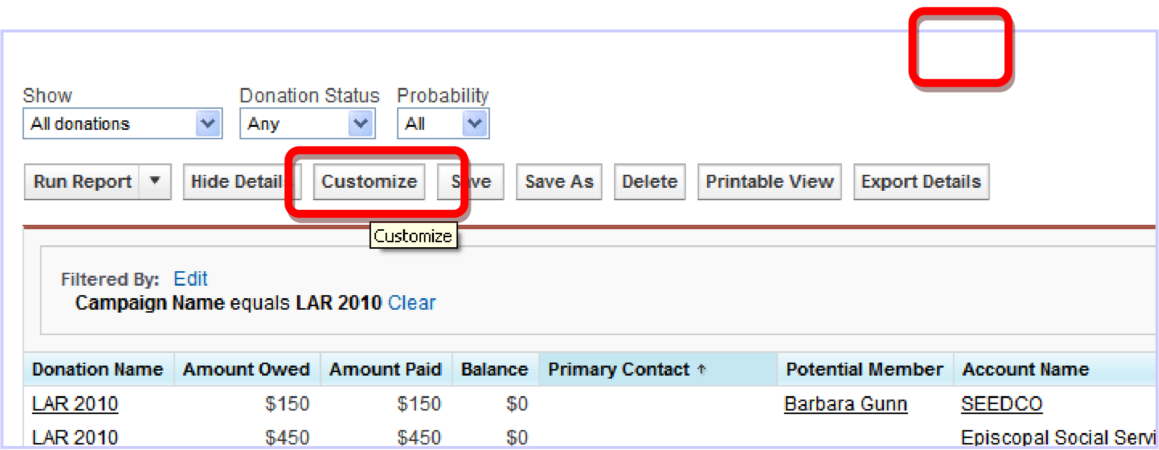
- **#14 LAR 2010**

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.

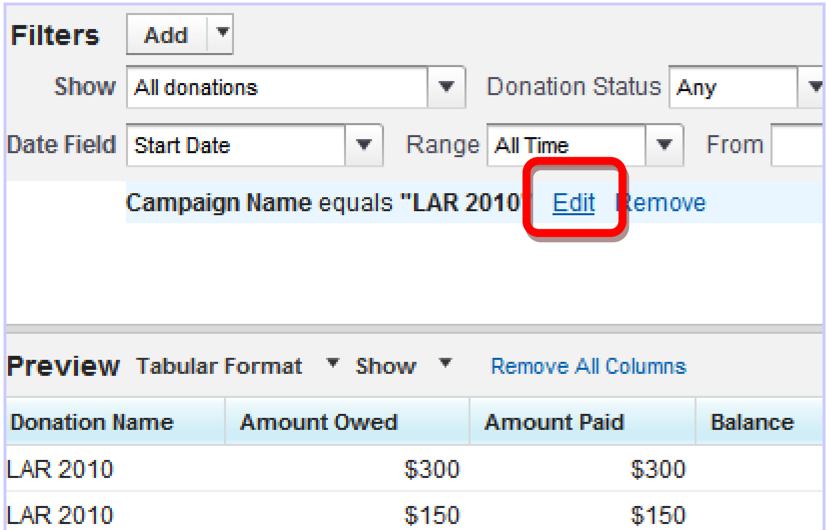
Donation Name	Amount Owed	Amount Paid	Balance	Primary Contact	Potential Member	Account Name
LAR 2010	$150	$150	$0		Barbara Gunn	SEEDCO
LAR 2010	$300	$300	$0	Aileen Gitelson		Jewish Association for Services for the Aged
LAR 2010	$100	$100	$0	Alan B. Siskind		Alan B. Siskind
LAR 2010	$500	$500	$0	Alan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

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

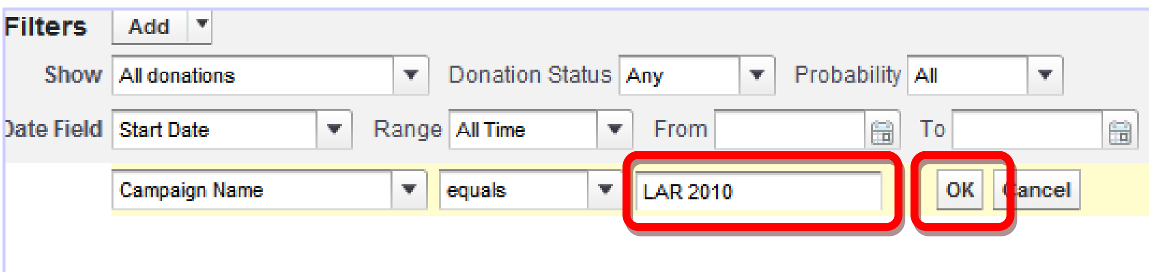
To create a new LAR report click on the button **Customize** on the top of the report.



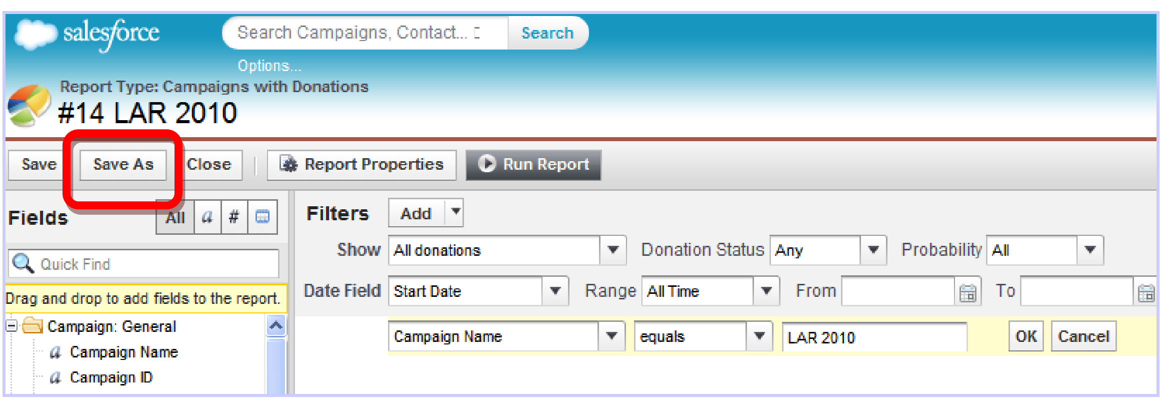
Click on the link **Edit** close to the filter **Campaign Name.** The link will appear if you position the cursor on the field Campaign name.



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

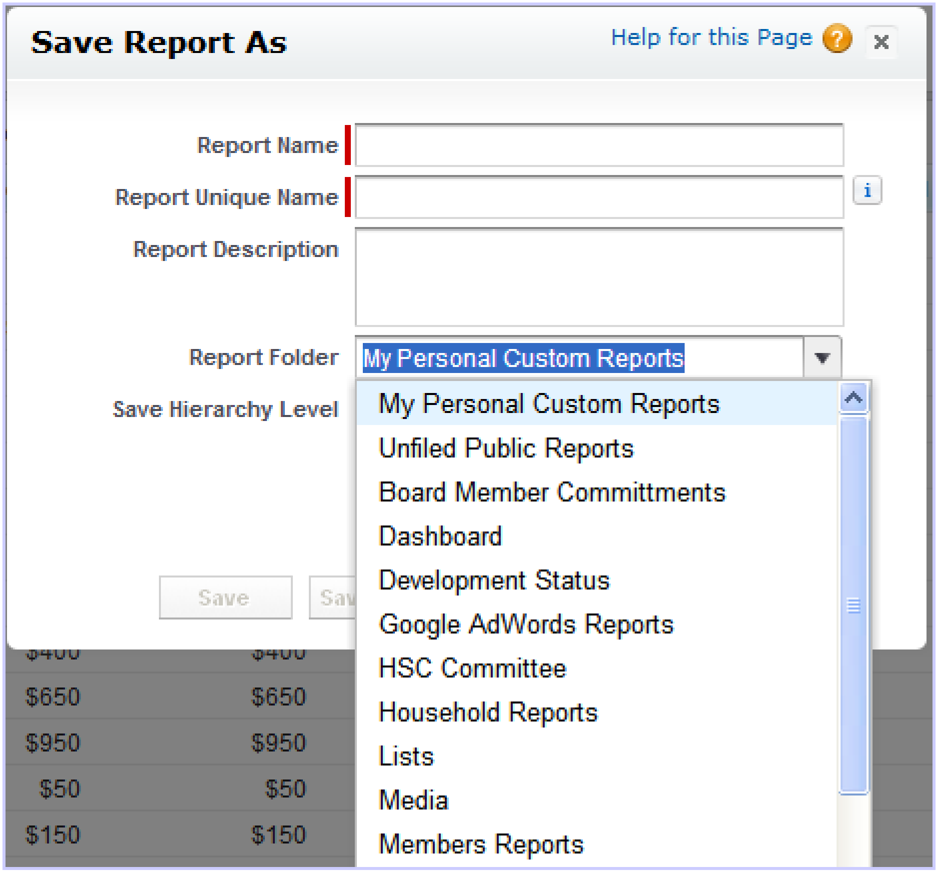


Press the button **Save As to** save the report.



Insert a **Report Name** (the field Report Unique Name will be updated by the System).

Select **Members Reports** in the field **Report Folder.**



Press the button **Save and Run Report**

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.

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

- **#2 Past Honorees List**

List of HSC Past Honorees.

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

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

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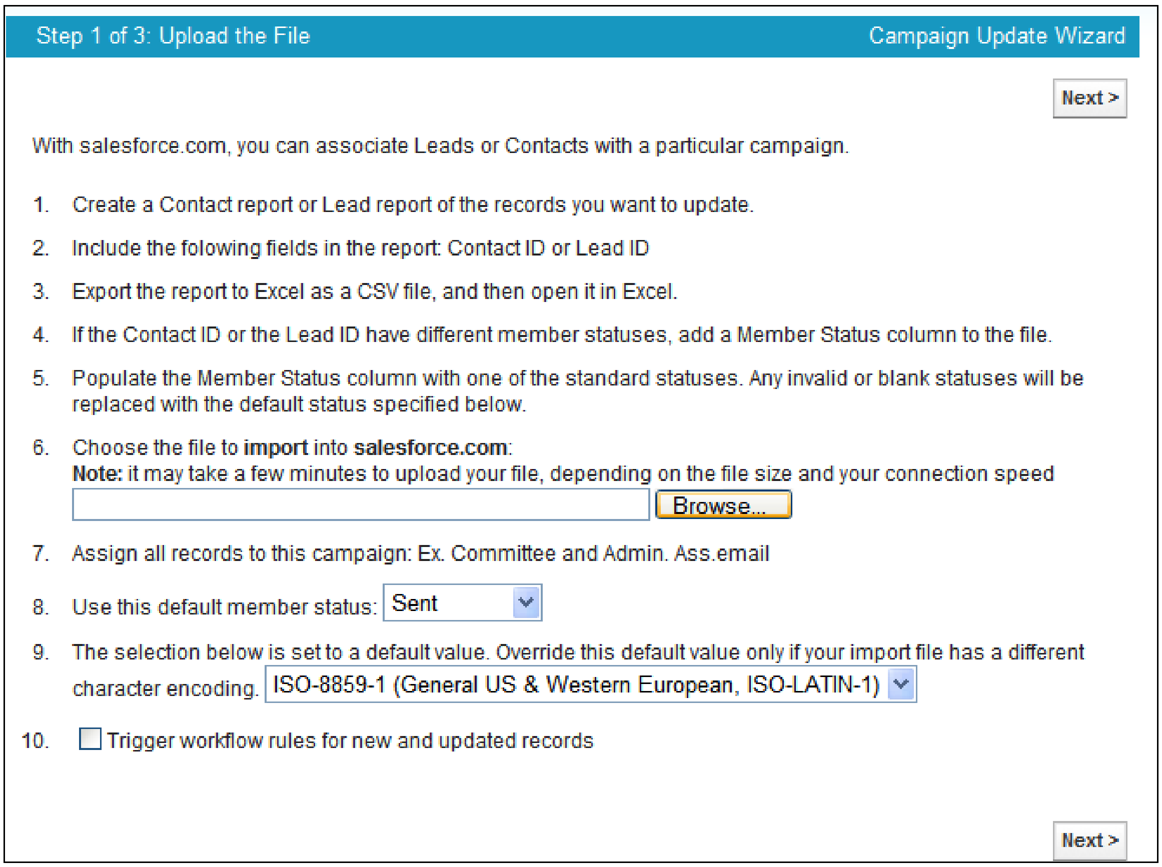
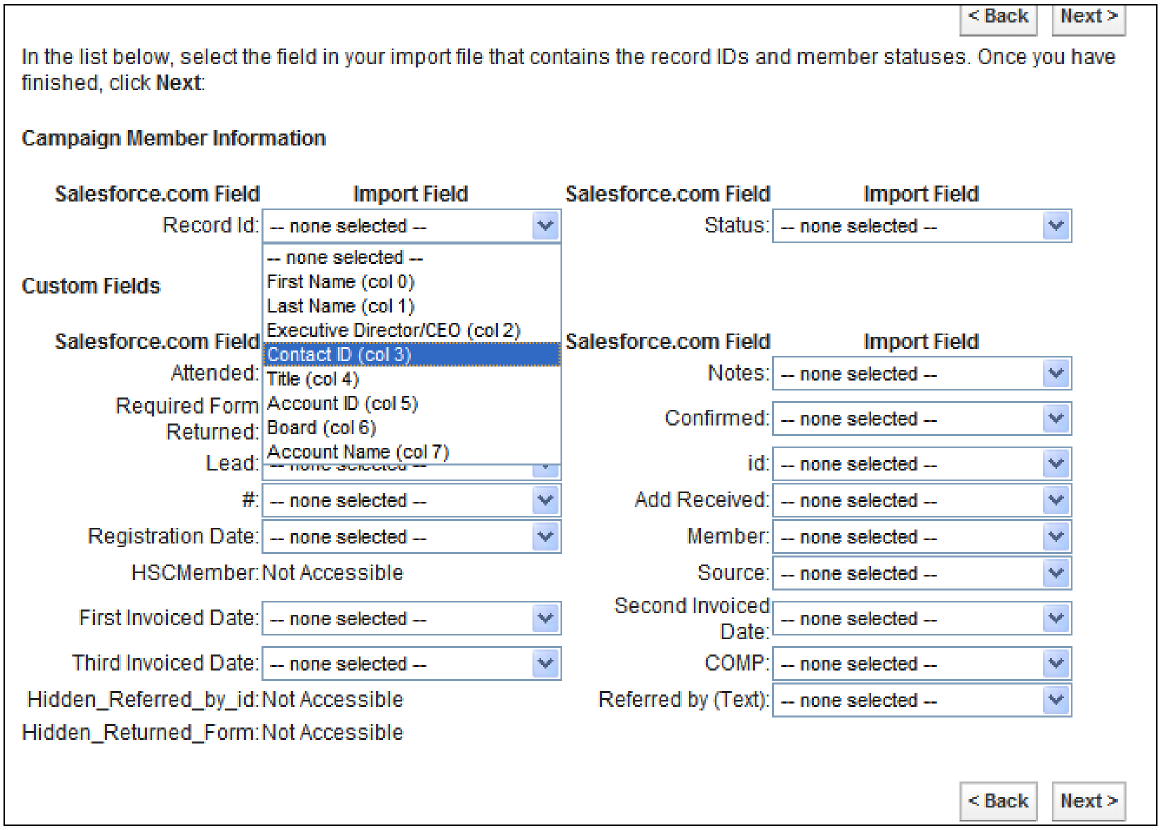
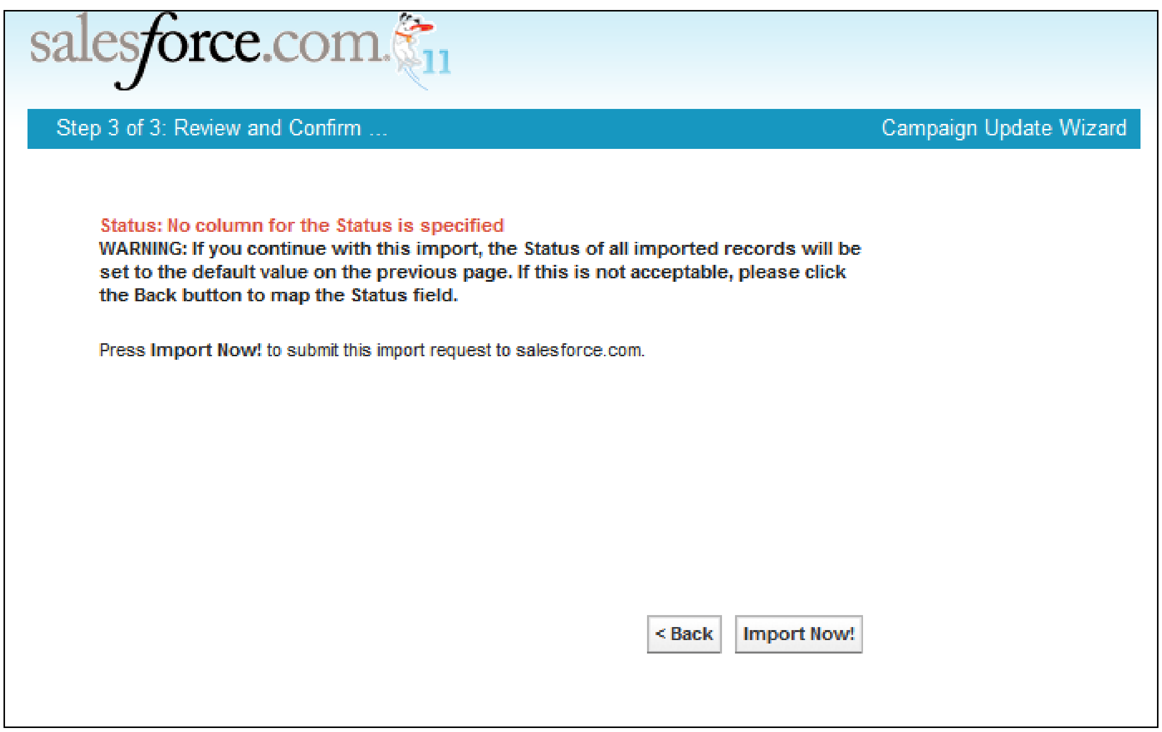
- **Error! Reference source not found.**



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



Click on the button **Import Now.**



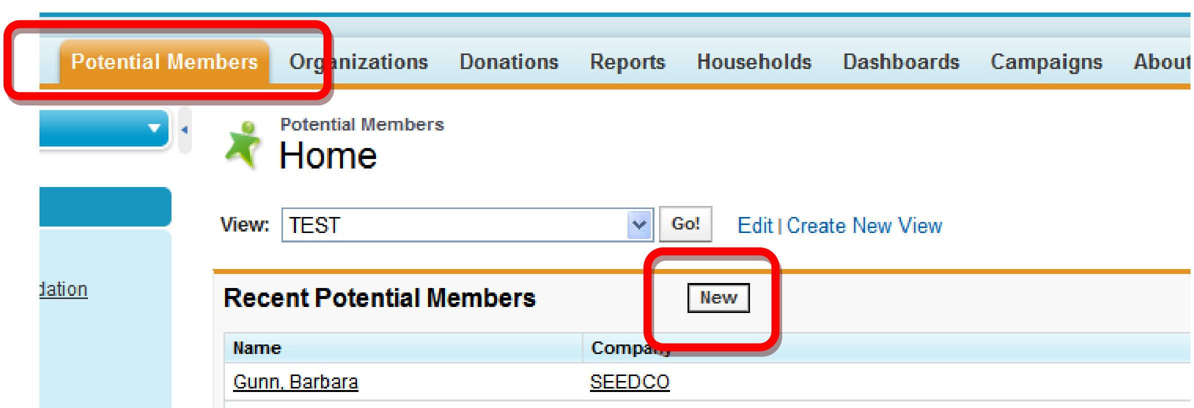
Repeat the same step for the list **HSC Board and Admin. Ass. E-mail Campaigns Members** (Note: The report name for this list under the folder SF System Admin is truncated to **HSC Board and Admin. Ass. E-mail Campaig** as the System doesn't allow long text for Report Name).

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

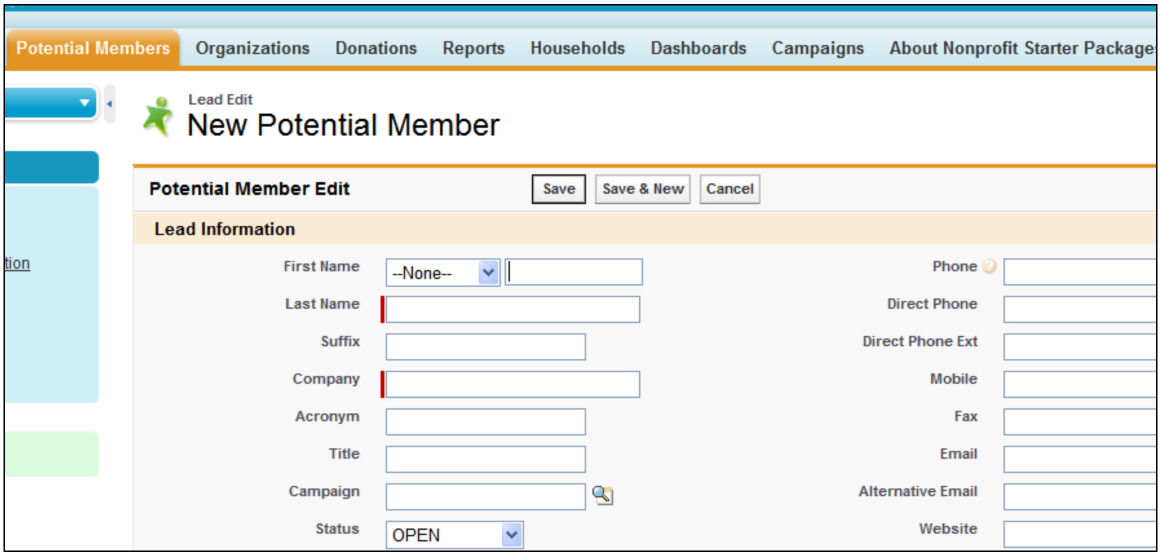
Working with Potential Members

1. Create a New Potential Member

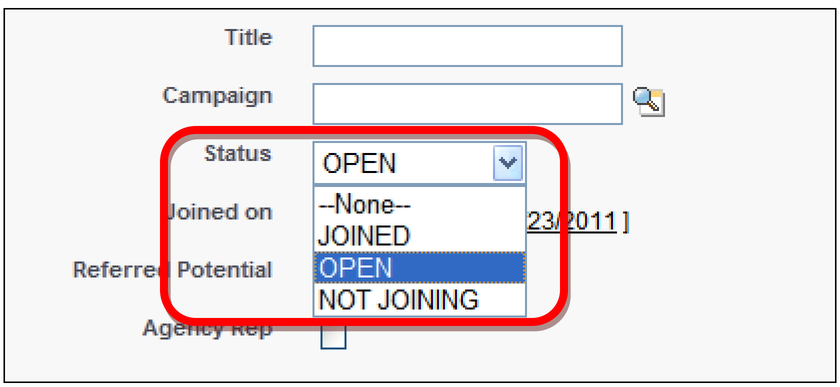
Click on the **Potential Members tab to work with potential members.** Click the **New** button to create a new entry**.**



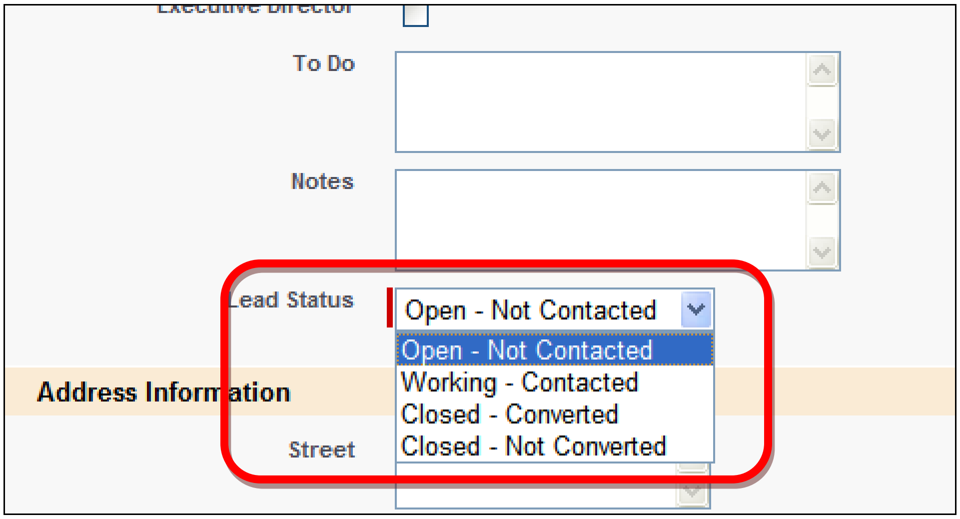
You will have to enter data for the mandatory fields, **Last Name** and **Company.**



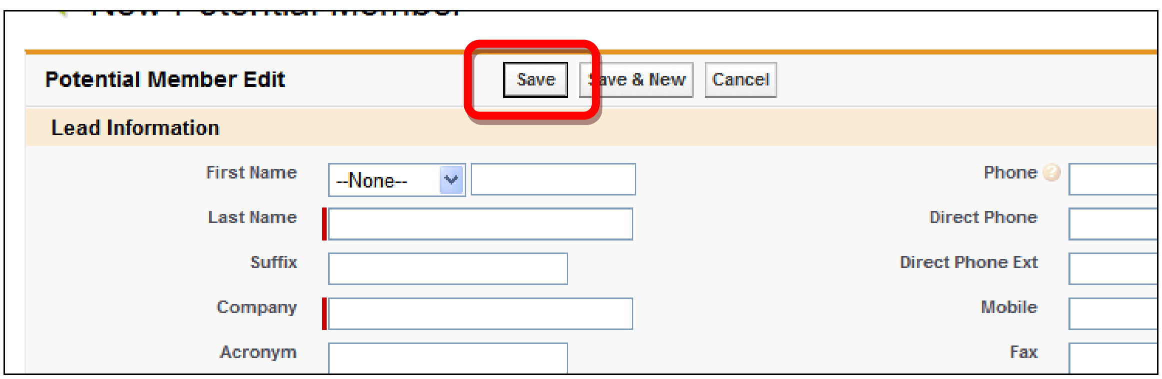
The **Status** field is already set to **OPEN.**



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.)



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

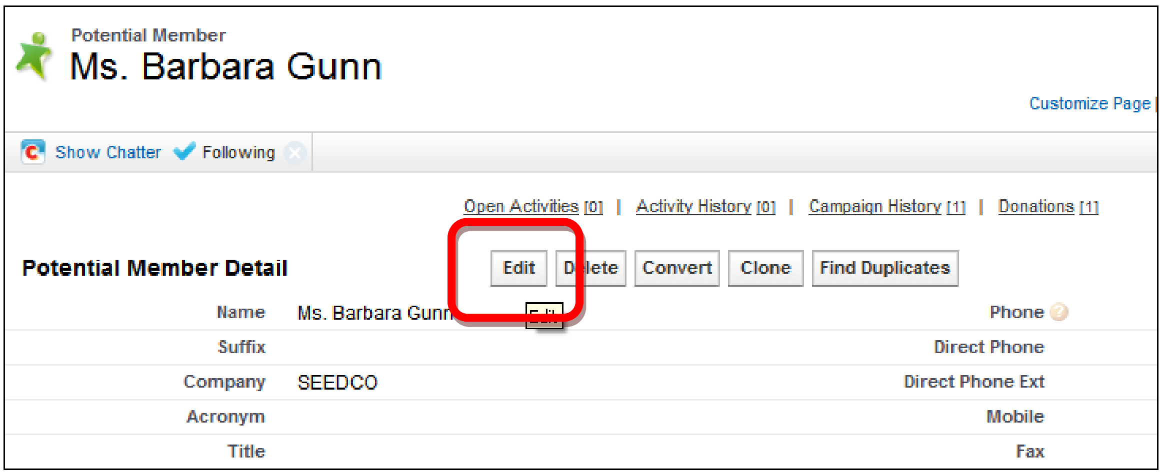


For Field details and descriptions see cap **Error! Reference source not found.** par.Potential Members Field

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**.

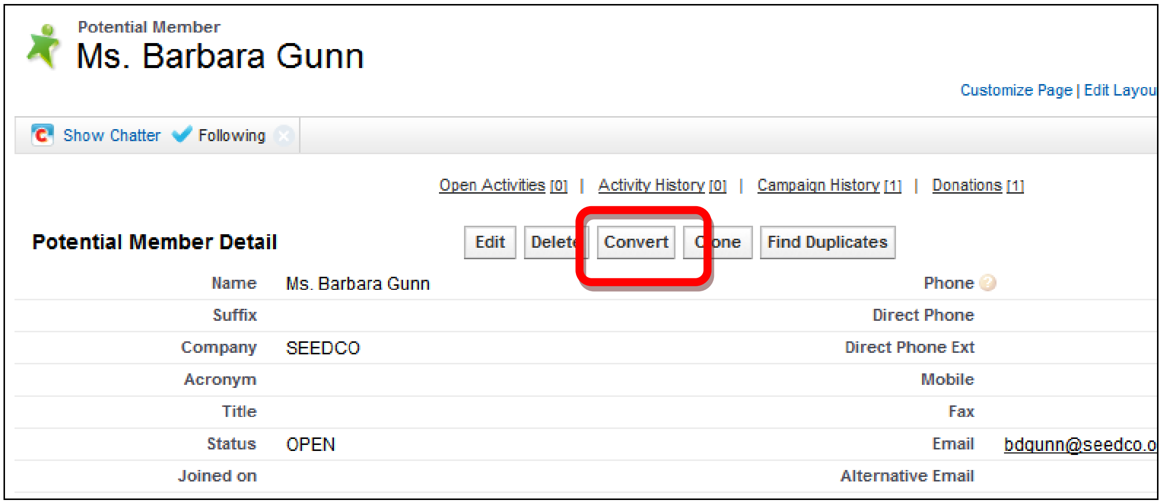
In the Potential Member record, click **Edit**. Fill in the fields that you want to update and press **Save** when you are finished.



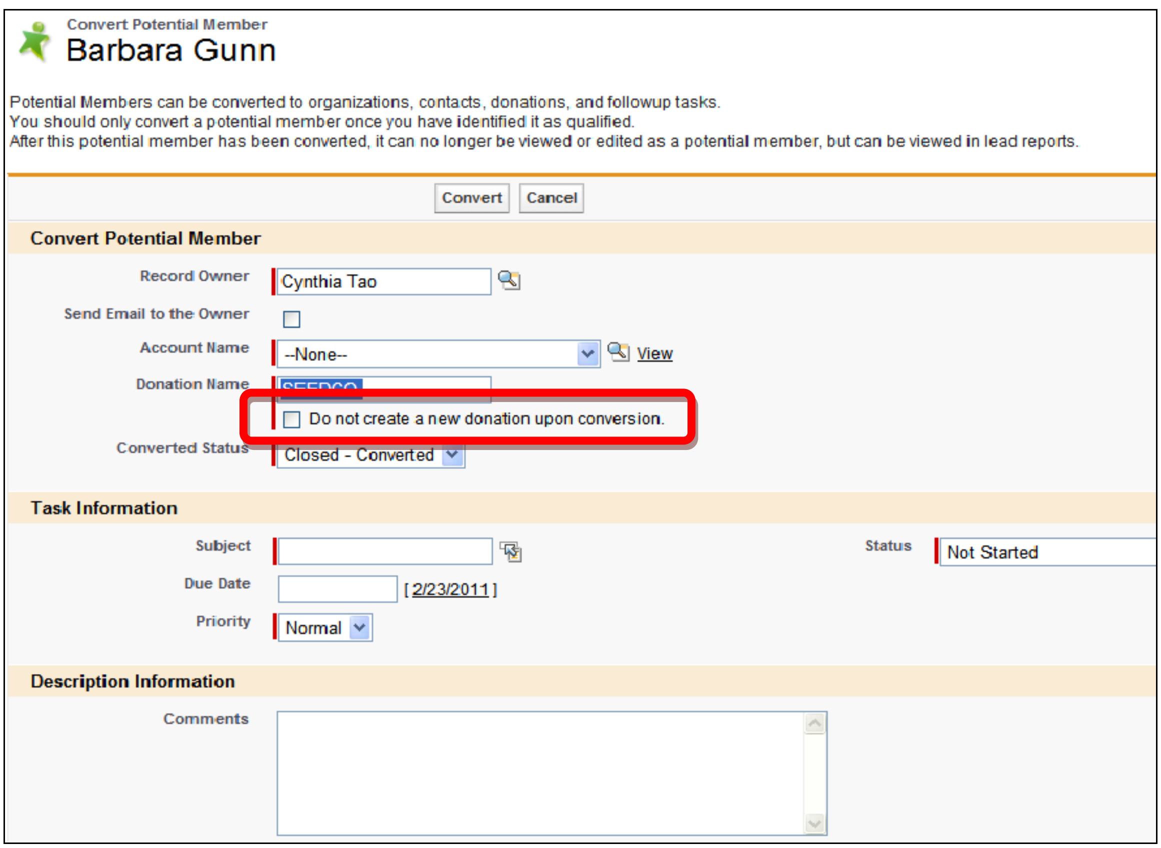
3. Convert a Potential Member into a Contact

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.

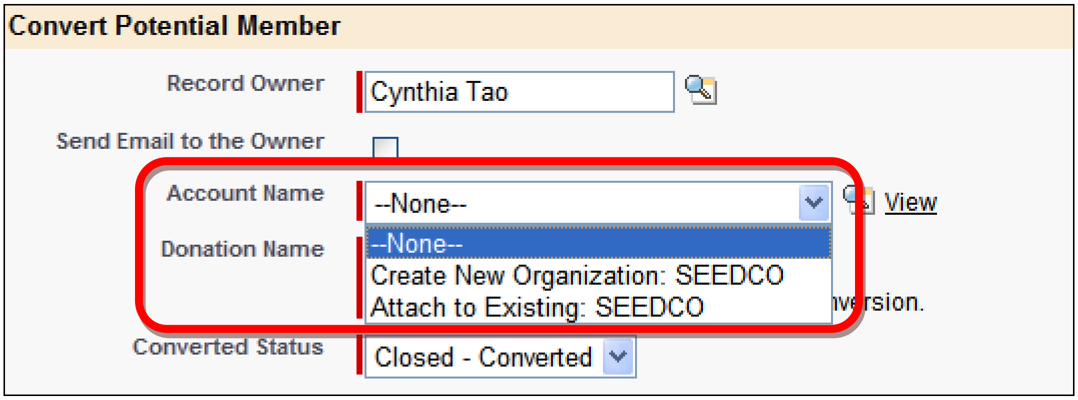
First, you can find the potential member record in the database by searching for the name as you did in the section above, Update an Existing Potential Member. After you have found the record, you can convert a **Potential Member** into a **Contact** by clicking the **Convert** button**.**



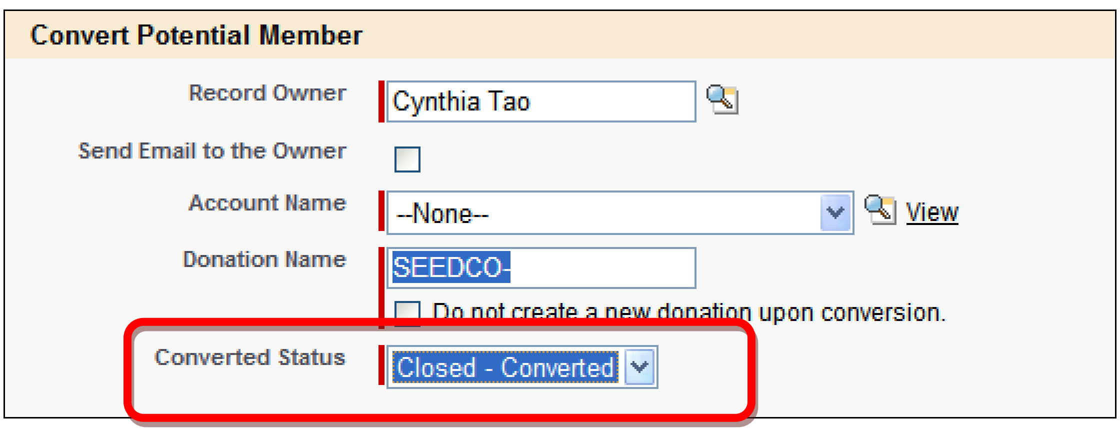
Do not check **Do not create a new donation upon conversion**.



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



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

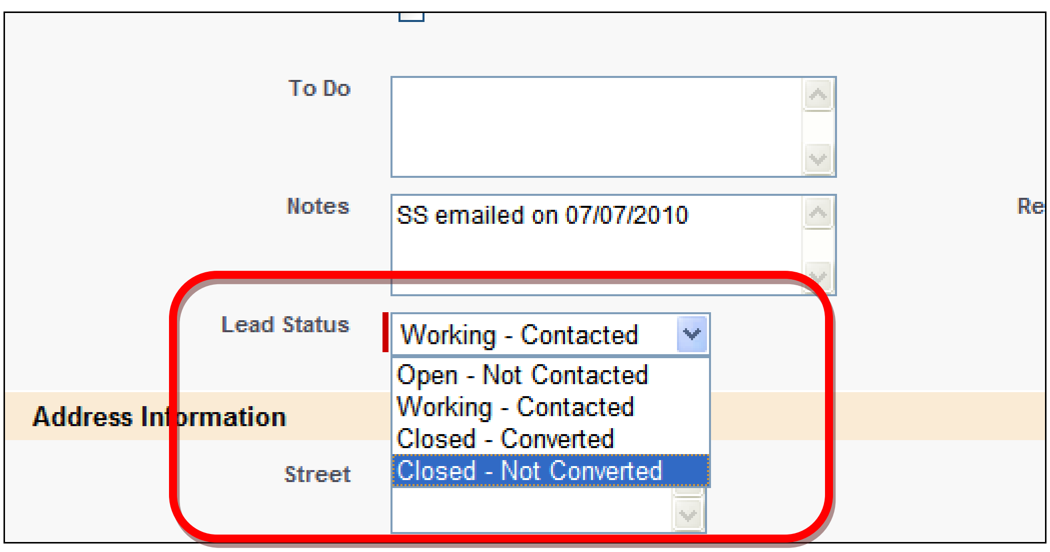


You can add further descriptions about the potential member or notes about them joining HSC – or task information if HSC indicated it would perform follow up work for them – in the record. When you have entered all information, press **Convert.**

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.

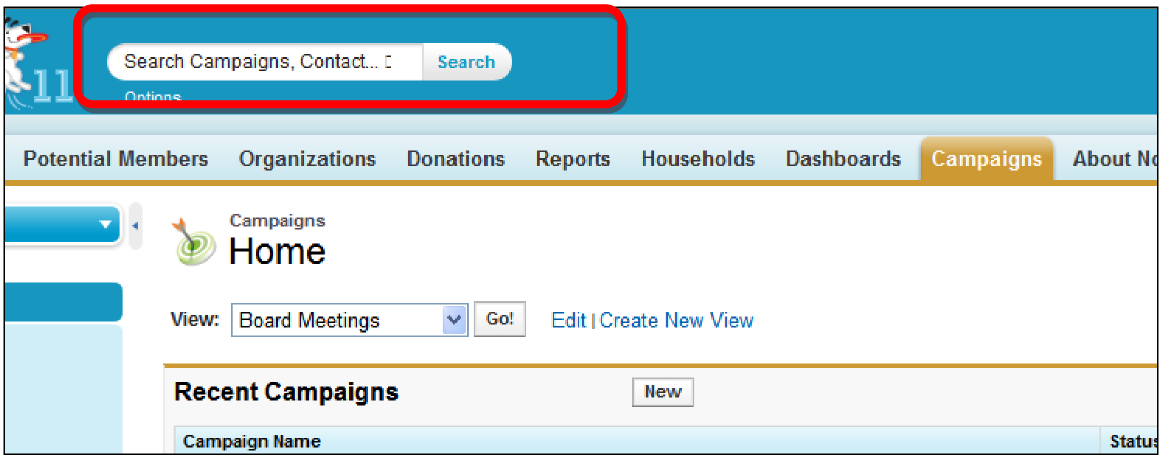
Set **Status** to **NOT JOINING** and **Lead Status** to **Closed-Not Converted**



Press **Save**.

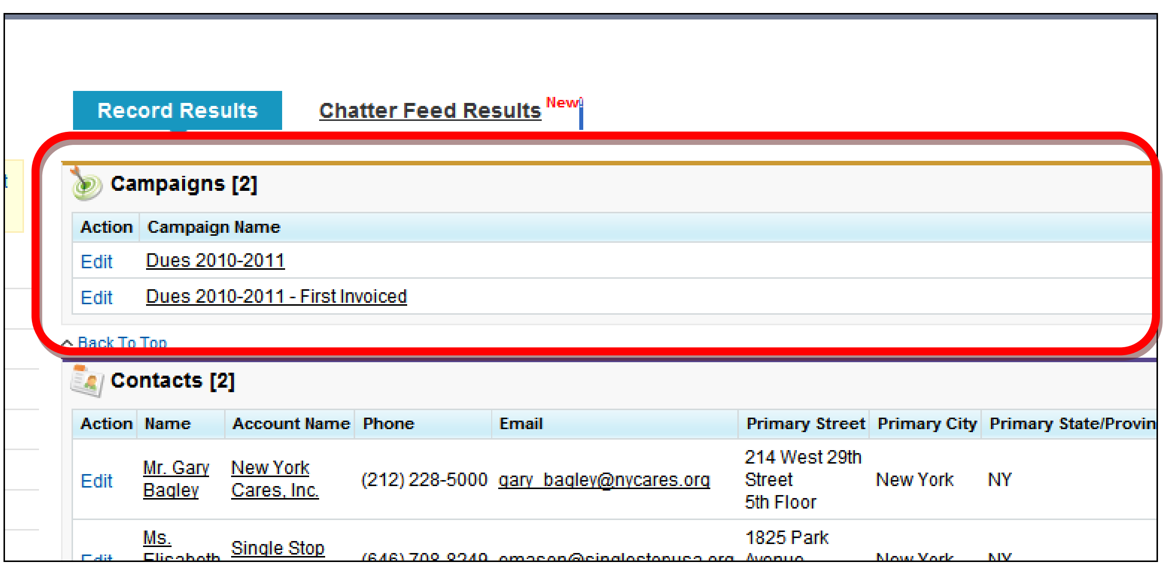
Tracking Membership Dues

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**.



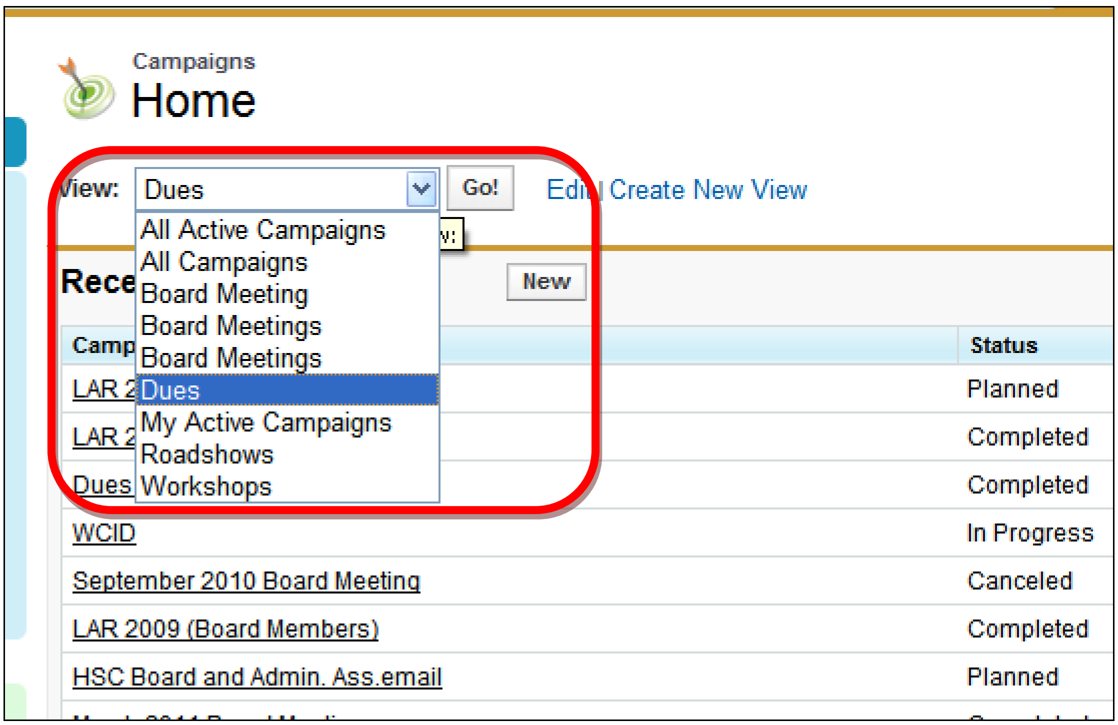
The Search will return all the Objects that contain the word "Dues" (for example the list of Contact that have the word "dues" in the *Note* field.

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



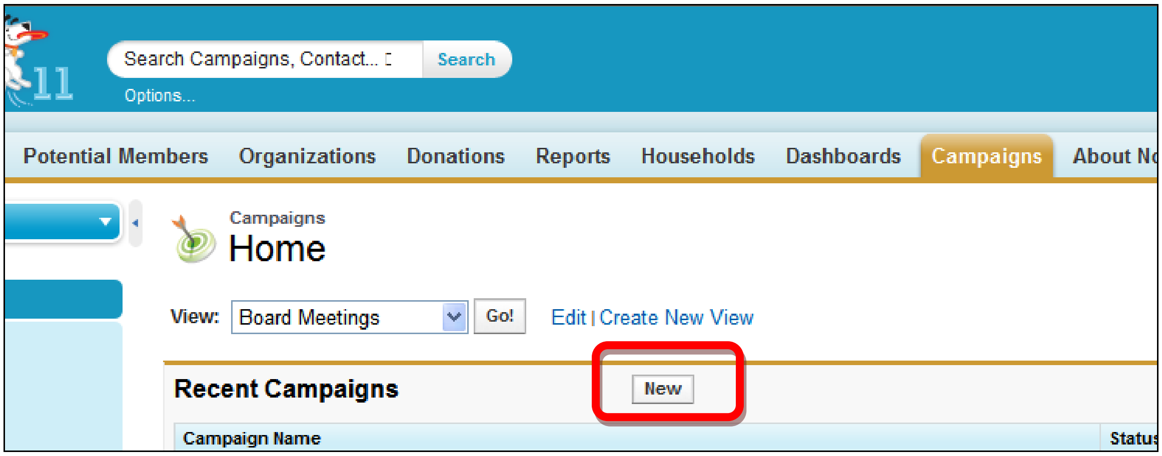
You can also click on the **Campaigns** tab to see a list of all active campaigns, which will include dues invoicing as well as other items that HSC is tracking in the database through campaigns.

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

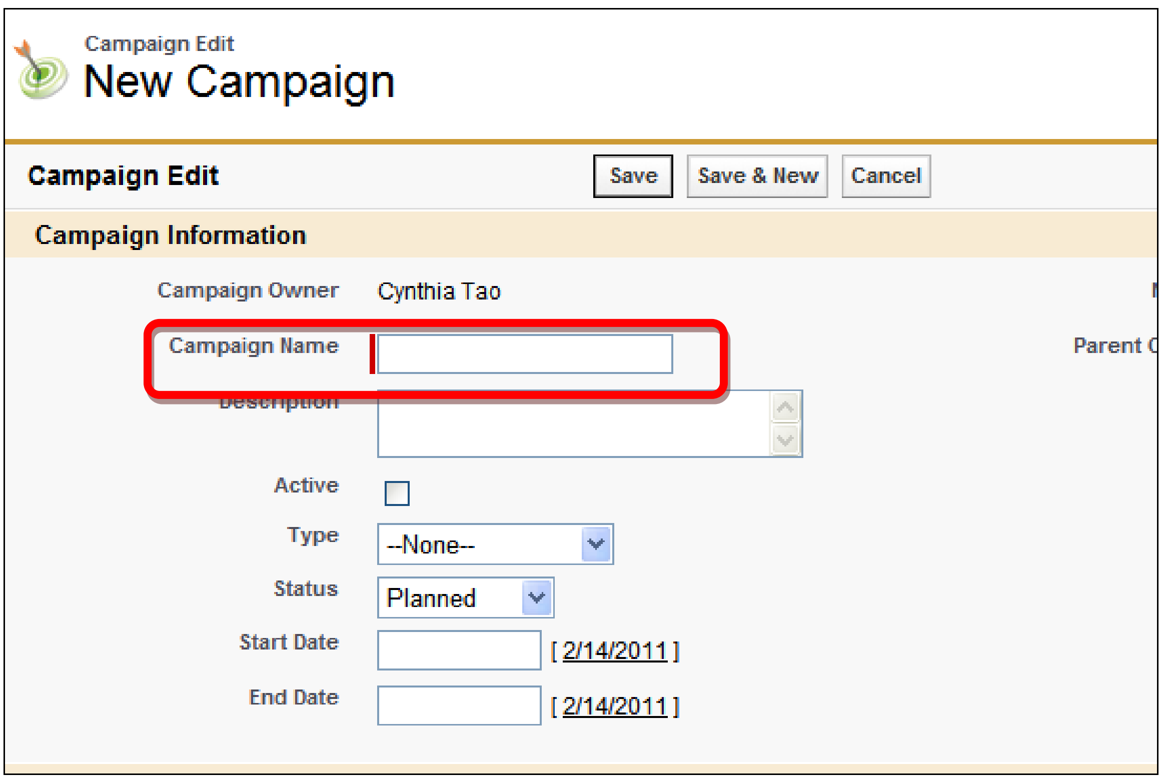


5. Create a New Dues Campaign

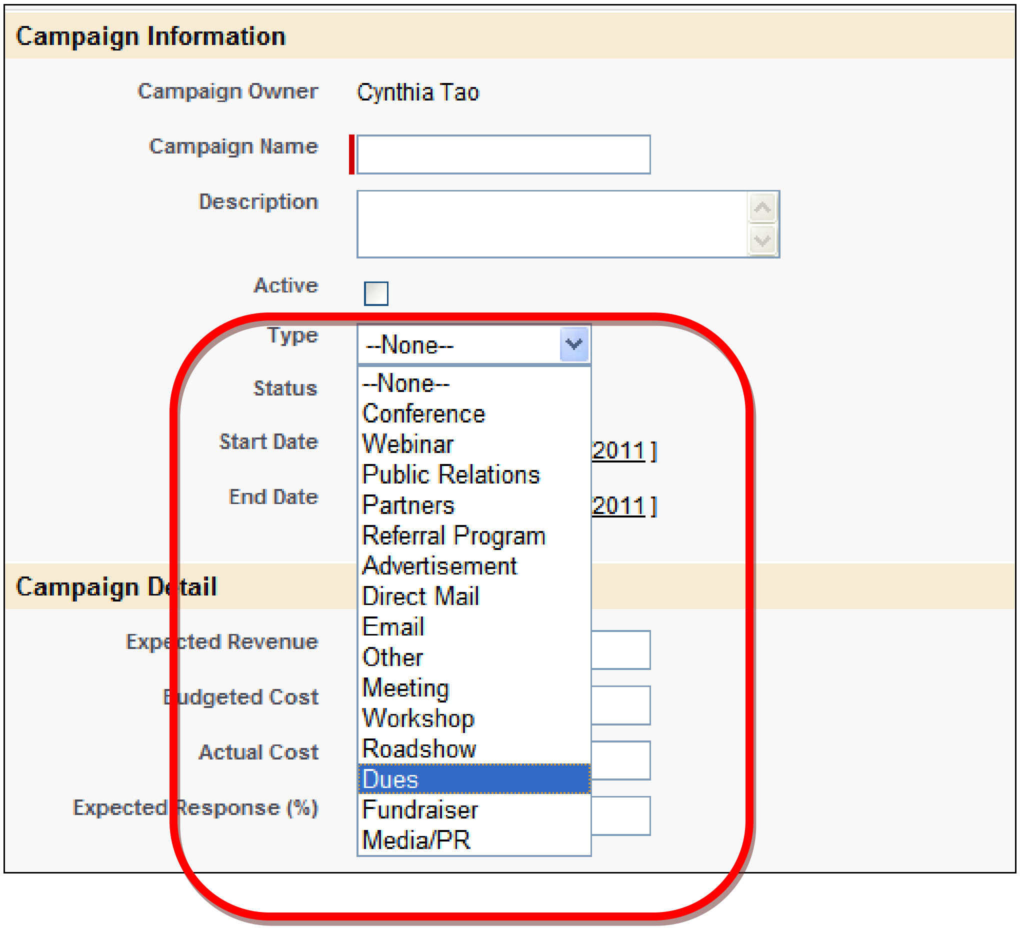
If you are about to launch a new round of invoicing members for their dues, you will want to create a new dues campaign in the database to track this activity. To create a new Dues Campaign, click the **Campaigns** tab, then the **New** button**.**



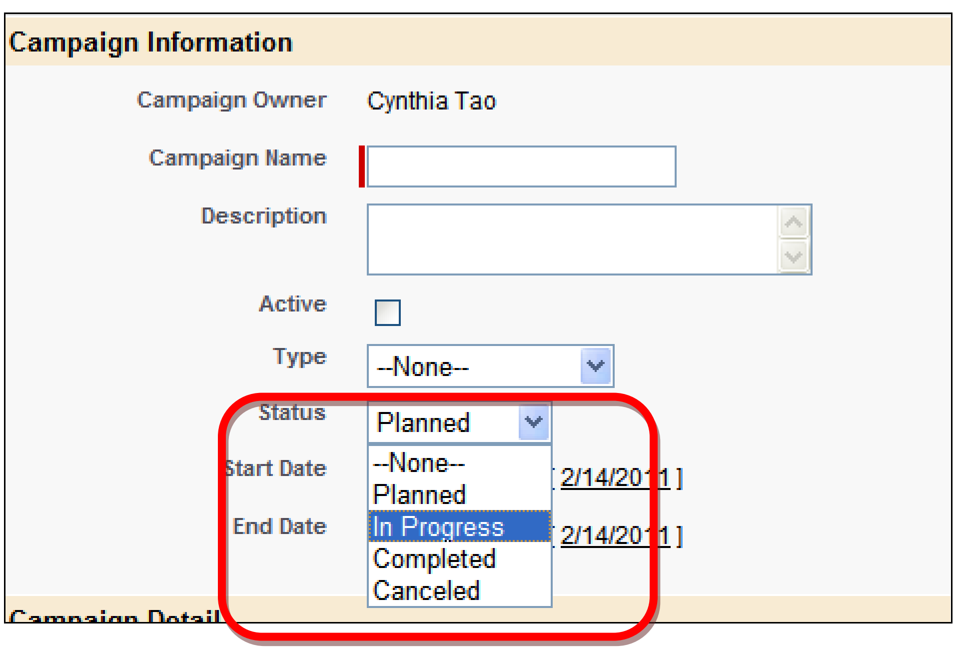
Campaign Name is a required field. Suggestion: To easily identify the Dues Campaign, use the title **Dues [Start Membership Date- End Membership Date]** (e.g Dues 2010-2011).



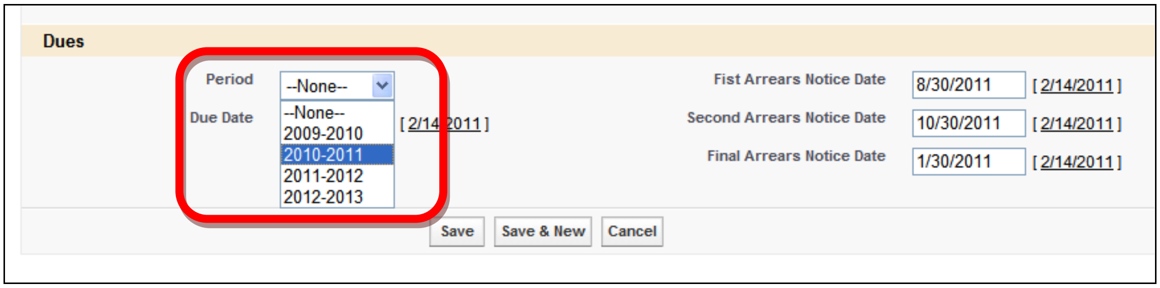
Select **Dues** under the drop-down list **Type.**



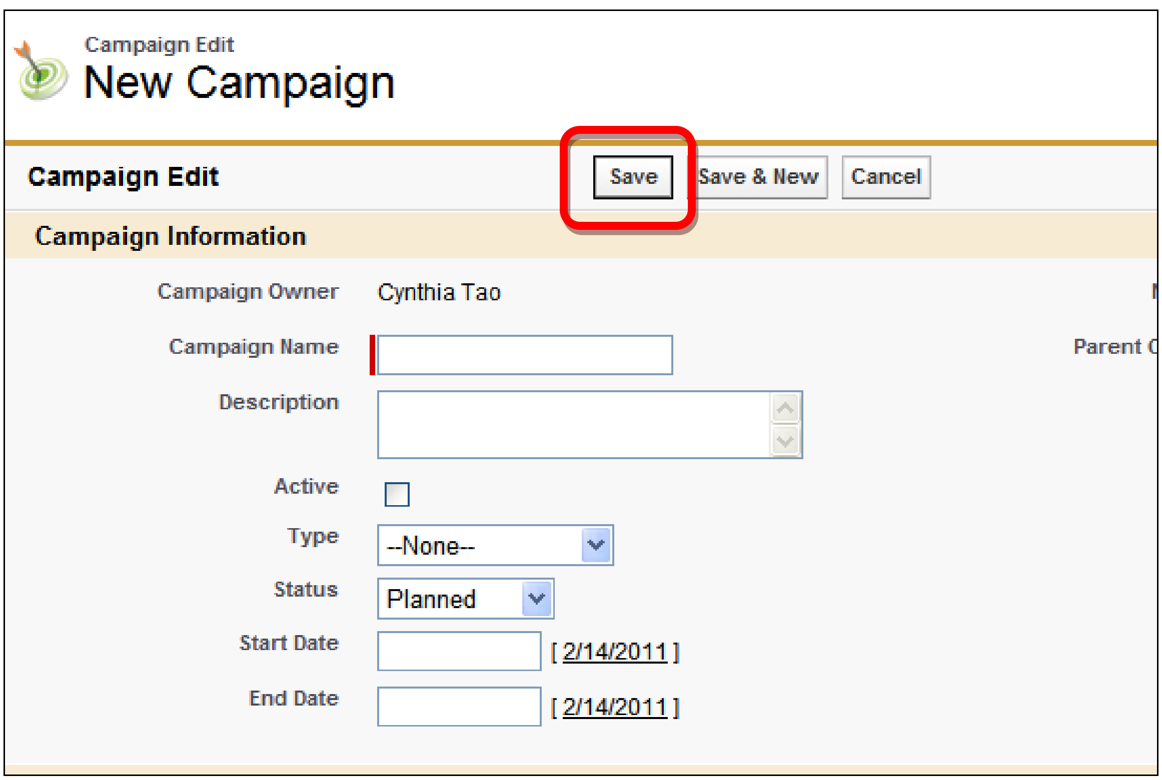
Set the field **Status** to **In Progress.**



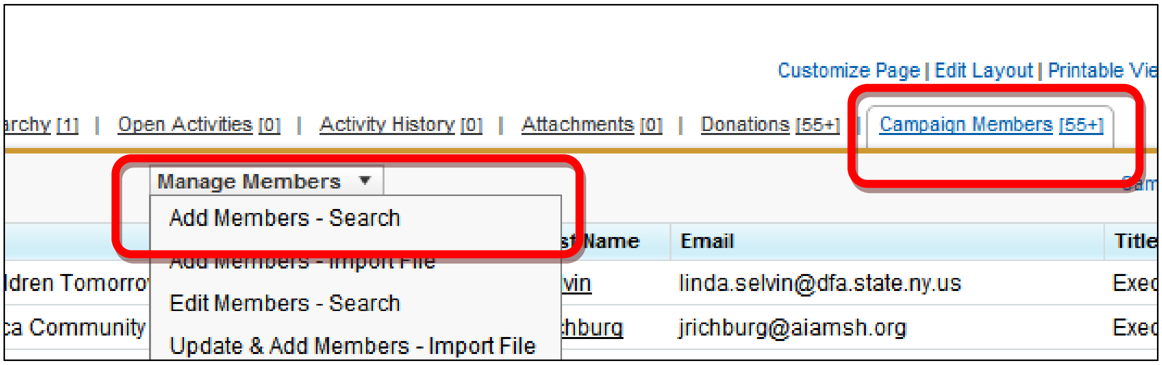
Scroll down and in the **Dues** section, click on the down-arrowhead for **Period** to select the fiscal year that is affected by this new campaign. It should match the years you indicated as the Start and End Membership Dates.



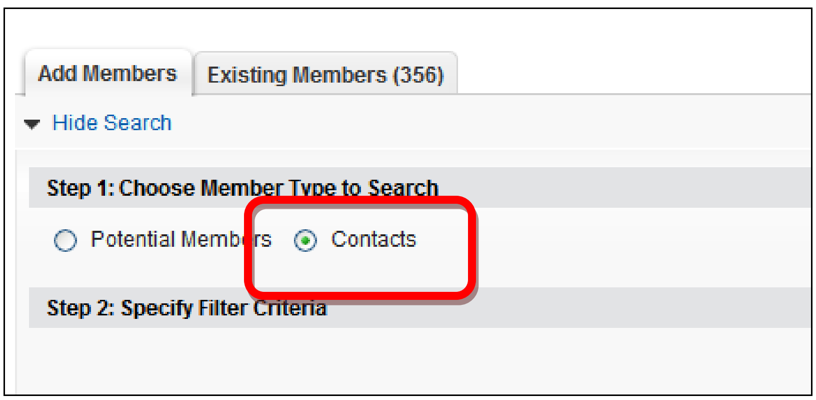
Note. The fields **Due Date, First Arrears Notice Date, Second Arrears Notice Date, Final Arrears Notice Date** are prefilled with values (using dates in July, August, October, and January, respectively). These <u>can be changed</u> by typing over the dates shown in the fields. When you are finished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



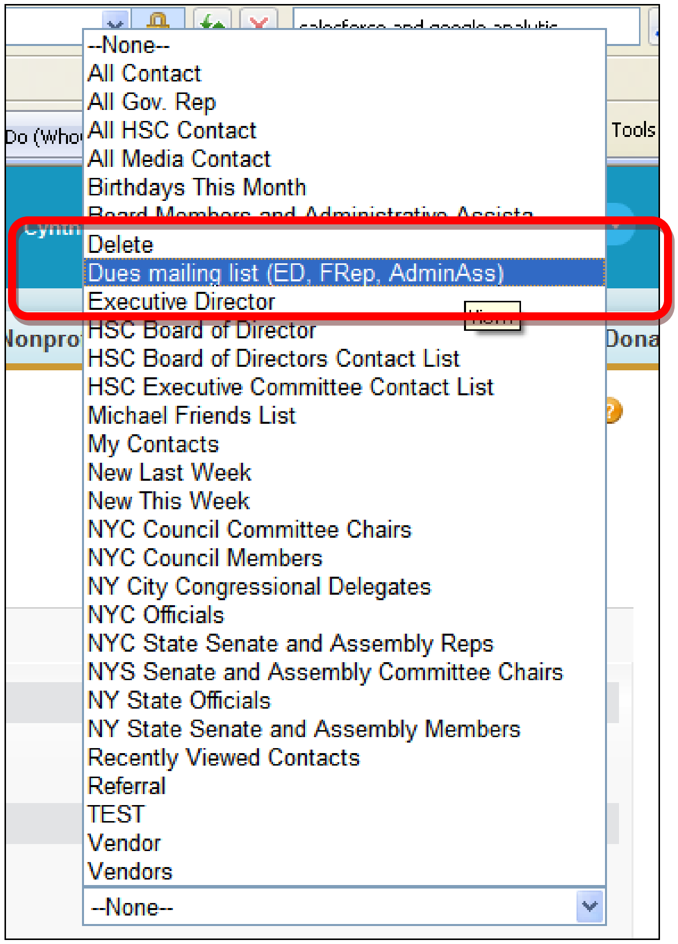
After you create the Dues Campaign in Salesforce, you need to create the list of members who are affected by the campaign. To create this list, place your cursor over **Campaign Members** link and you'll see a **Campaign Members** box from which you can click on **Manage Members**. Select **Add Member-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



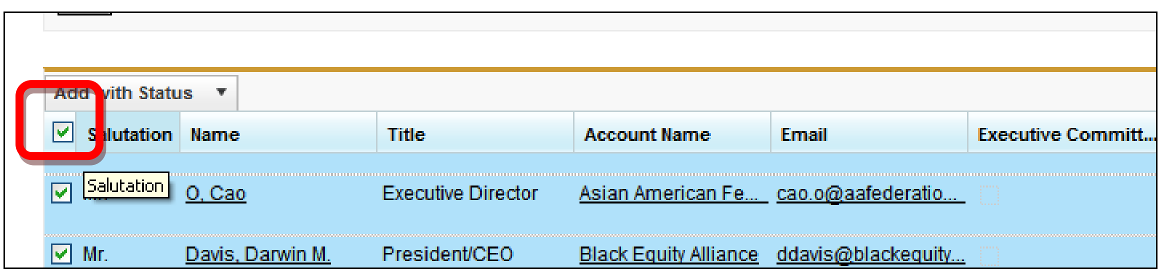
You'll go to a new **Manage Members** screen. On **Step 1: Choose Member Type to Search,** select **Contacts.**



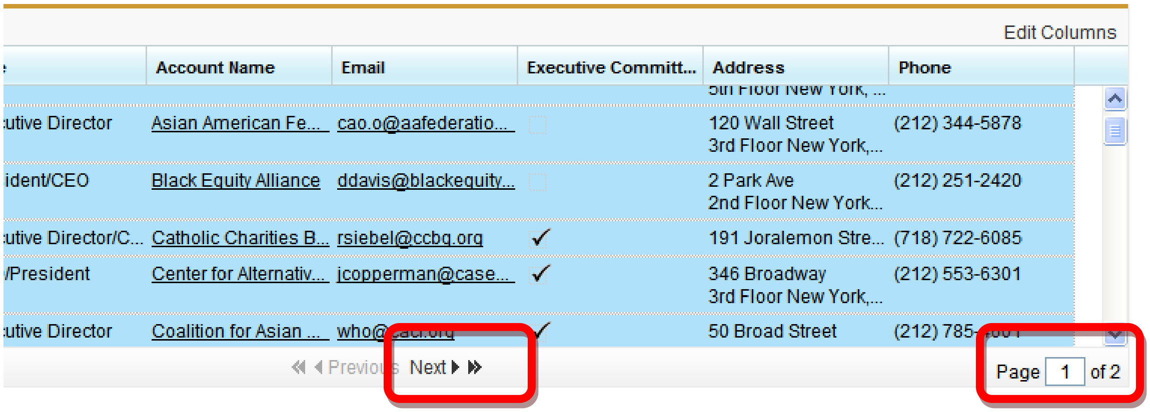
Under **Step 2: Specify Filter Criteria**, click on the down arrowhead in the box **Use Existing View.** Click on **Dues mailing list (ED, Frep, AdminAss)** from the pull-down entries**.** The list contains all of the HSC member organization's Executive Directors, Financial Reps, and Administrative Assistants.



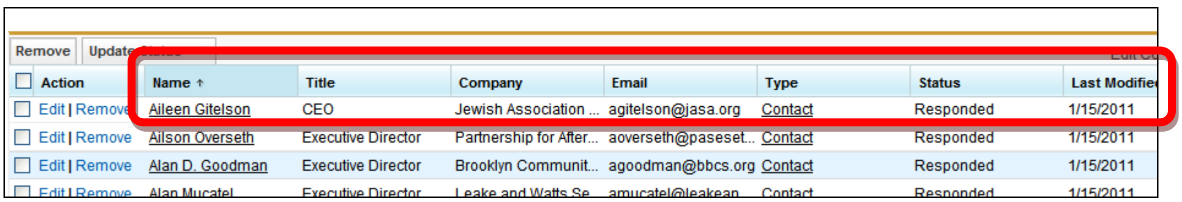
.To decheck members to the list, you can click the checkbox in front of each name



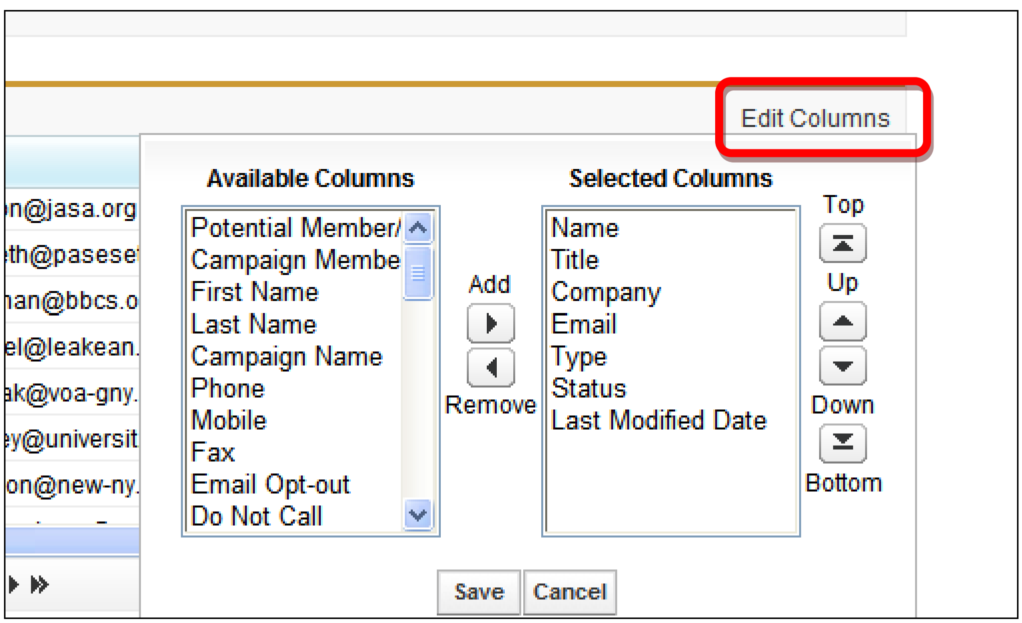
A page typically has 100 names on it, so remember to repeat these steps so you can add members from each page of the list. To go to the next page, click **Next**.



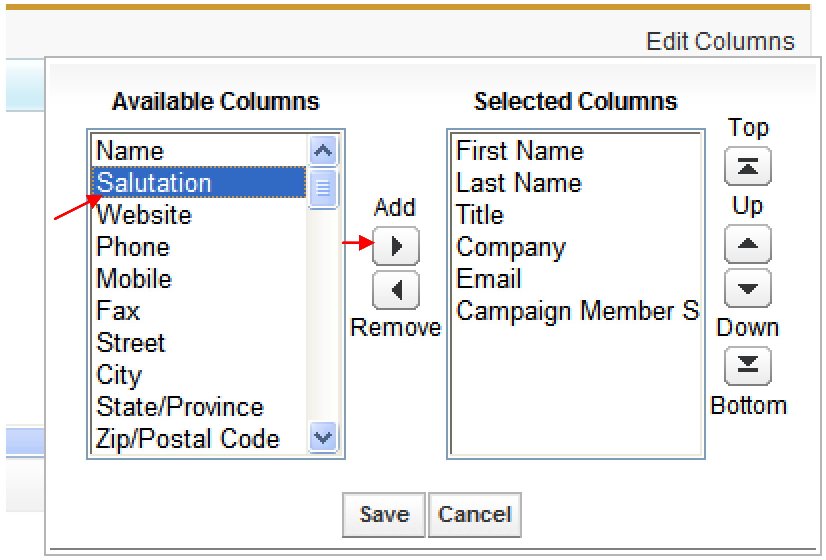
Salesforce adds a series of default information for you list as **Name, Title, Company,..**



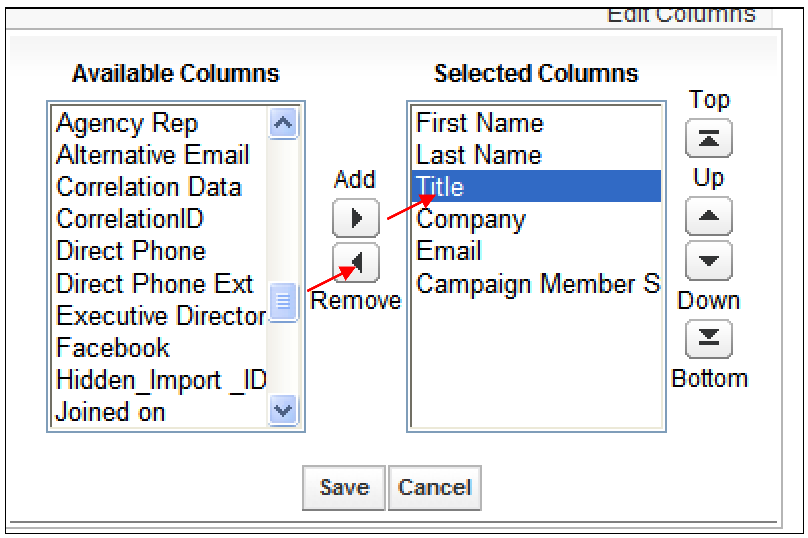
If you need to display different column click on the link **Edit Columns** on the left corner of your list



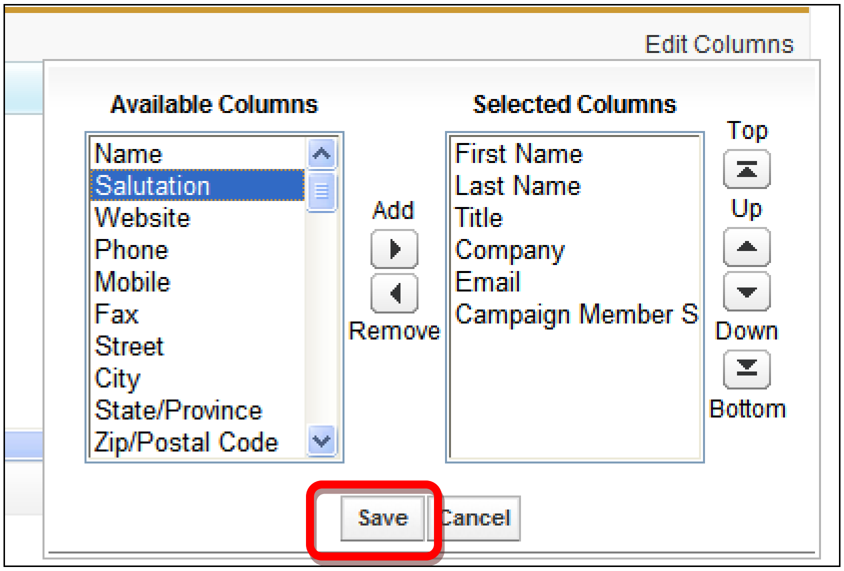
To add a column select from the list **Available Columns** and press **Add.**



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

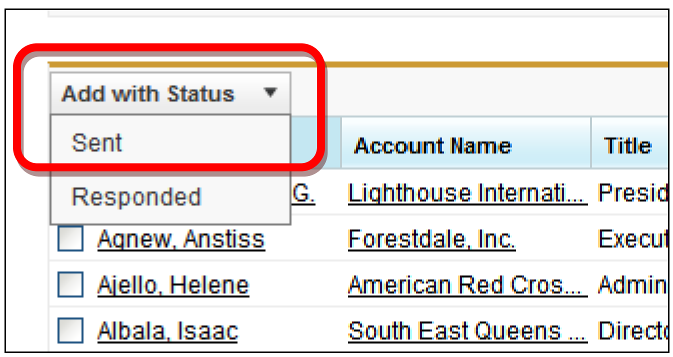


When you finish press **Save.**

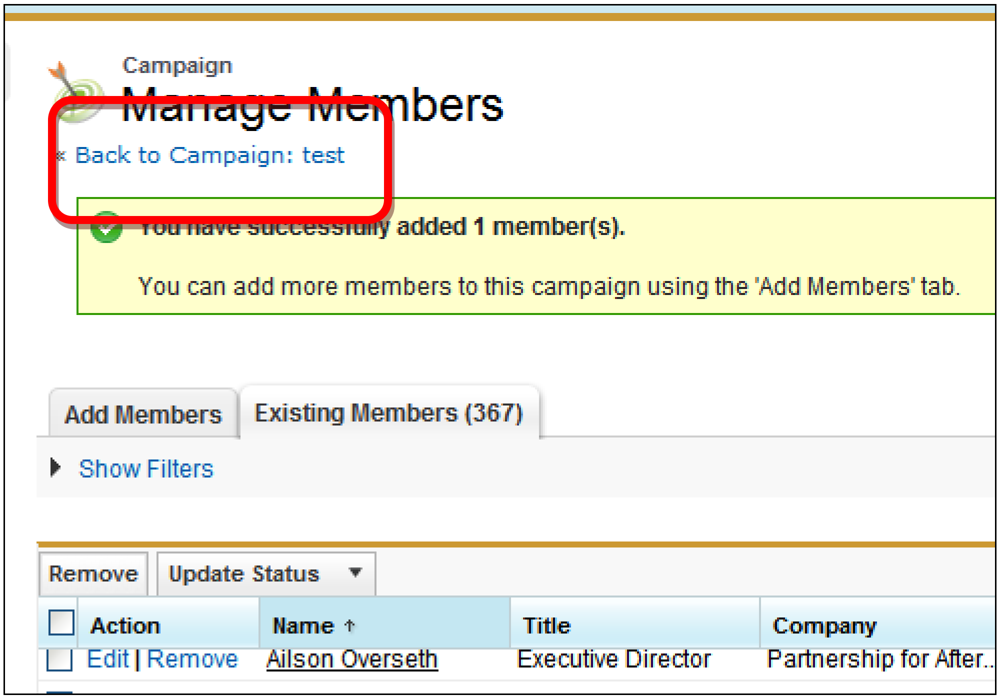


When you have finished adding all members to your new campaign, select **Sent** from the drop-down list for **Add with Status.**

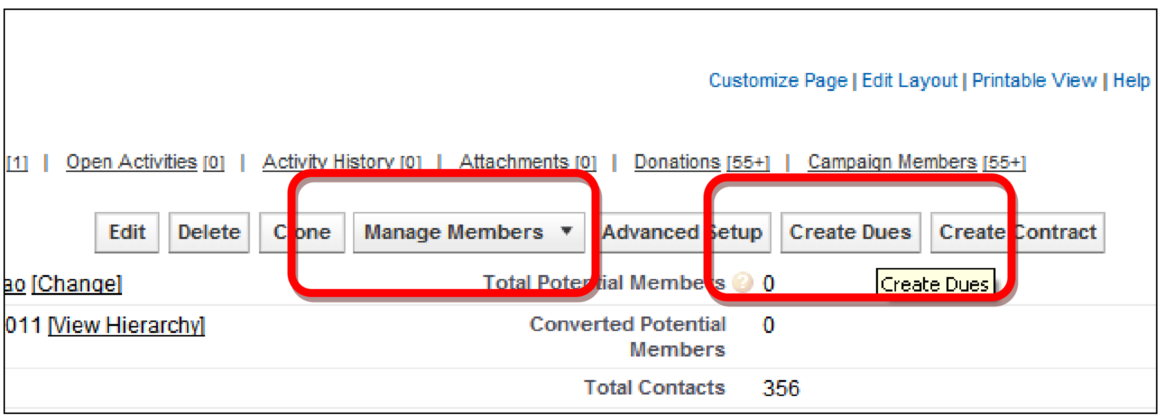
Note: even the field Status= Sent has no significance for HSC process, due to Salesforce implementation we have to pick a value between Sent/Responded.



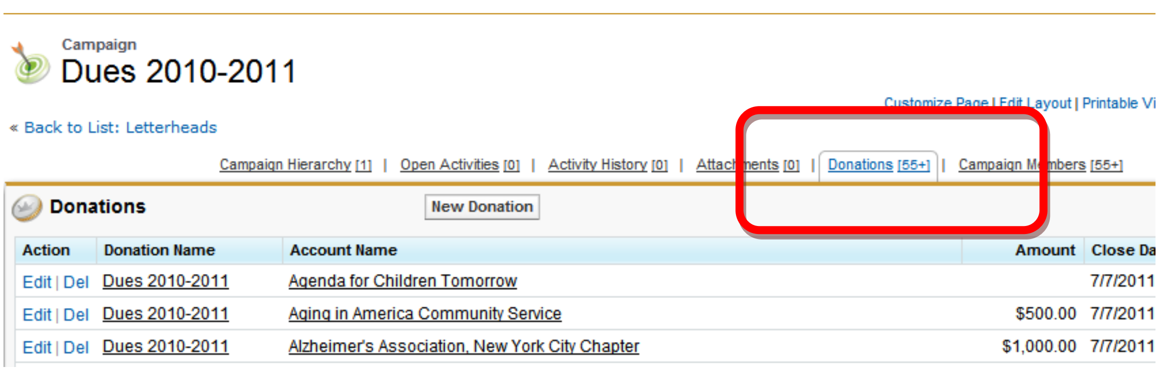
Click on the link Back to **Campaign on the top of the page**.



Press the **Create Dues** button.



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

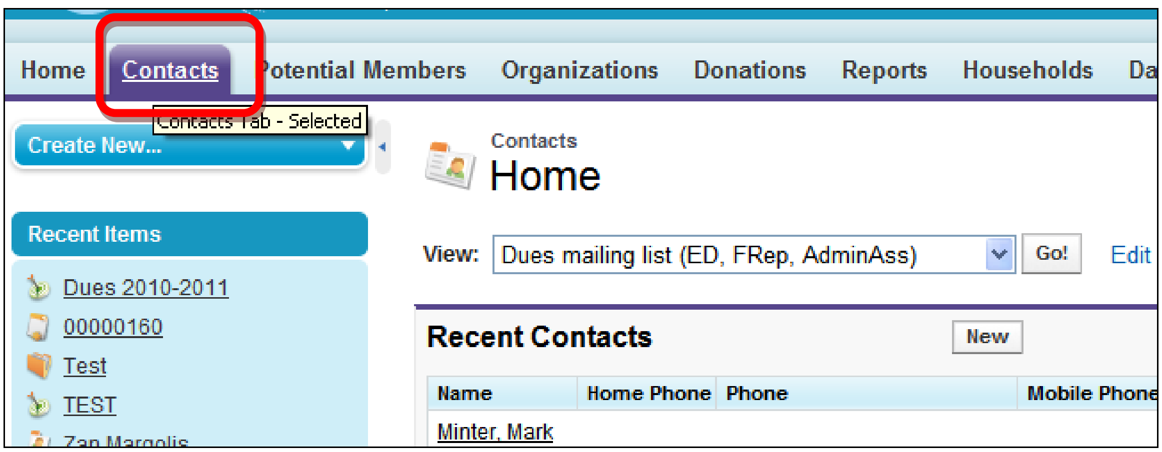


6. Create and Send Annual Dues Invoices

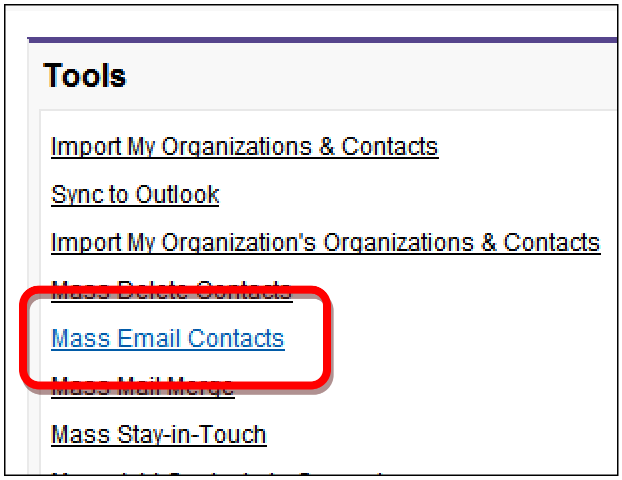
Note: the process described below to manage the mass e-mail of Annual Dues Invoices is under development and may need to be modified.

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.

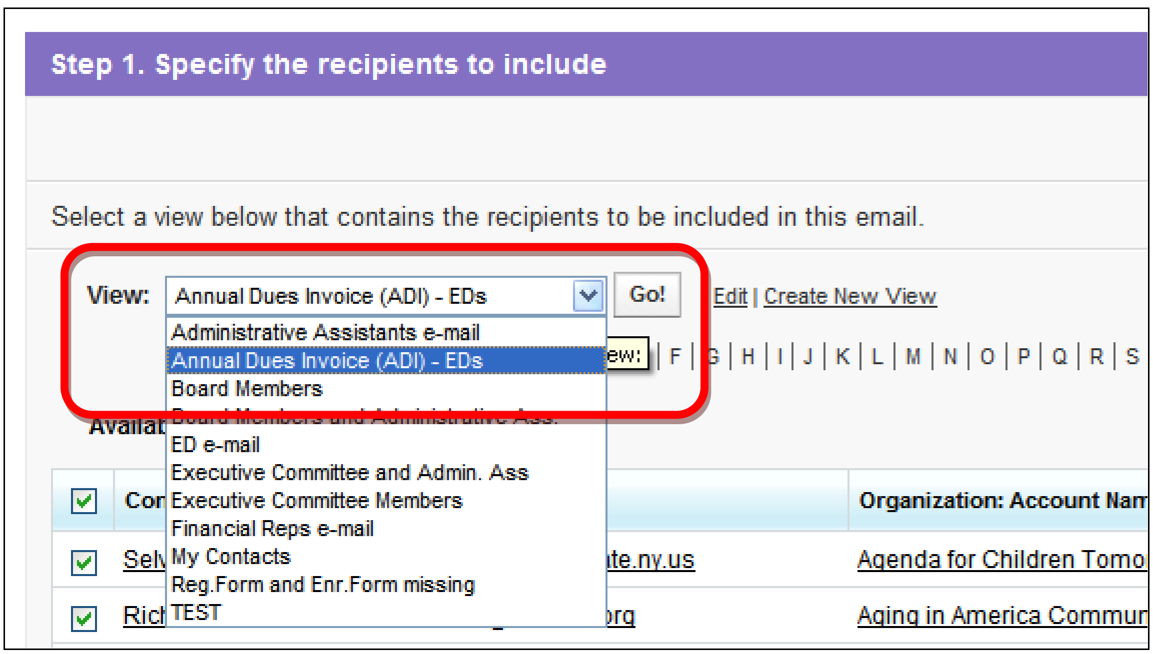
To send the first **Annual Dues Invoice** to all HSC member organizations, click on the **Contacts Tab.**



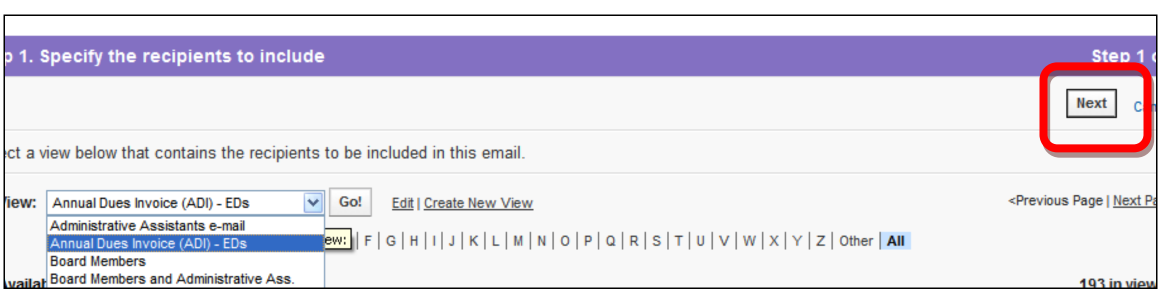
Then click on the link **Mass E-mail Contact** under the **Tools** section.



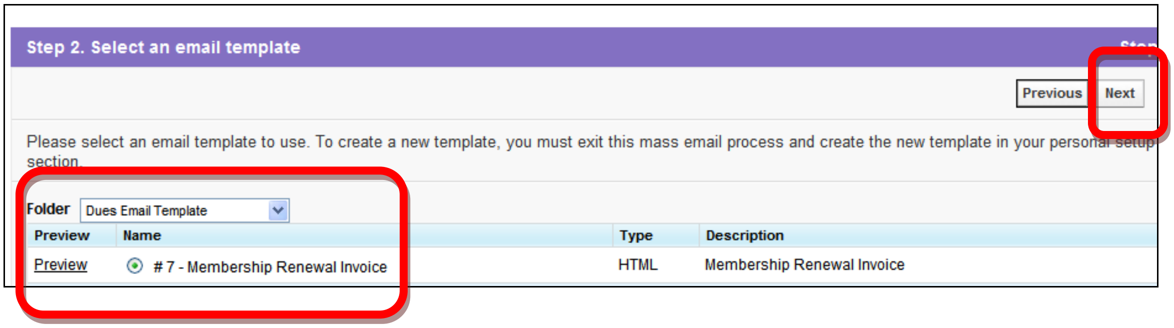
Select the **View Annual Dues Invoice (ADI) - EDs**. Press the **Go** button.



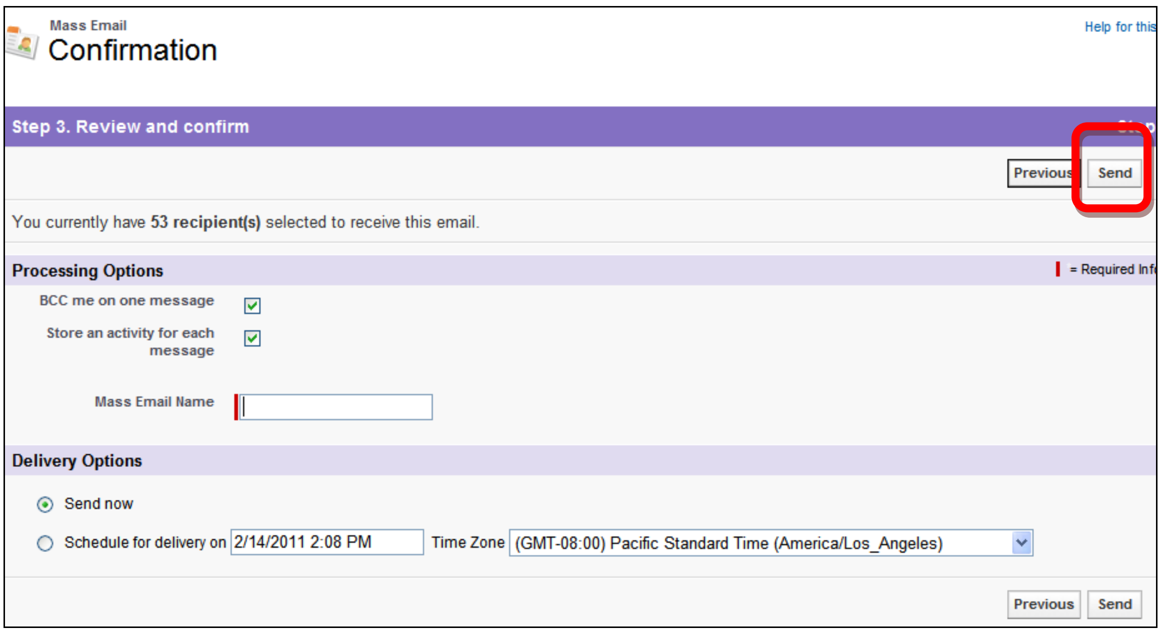
Click the **Next** button.



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

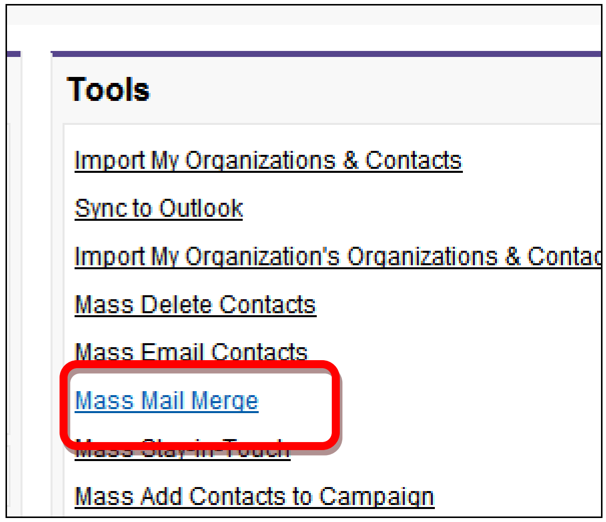


Select the **Option**. Press **Send**

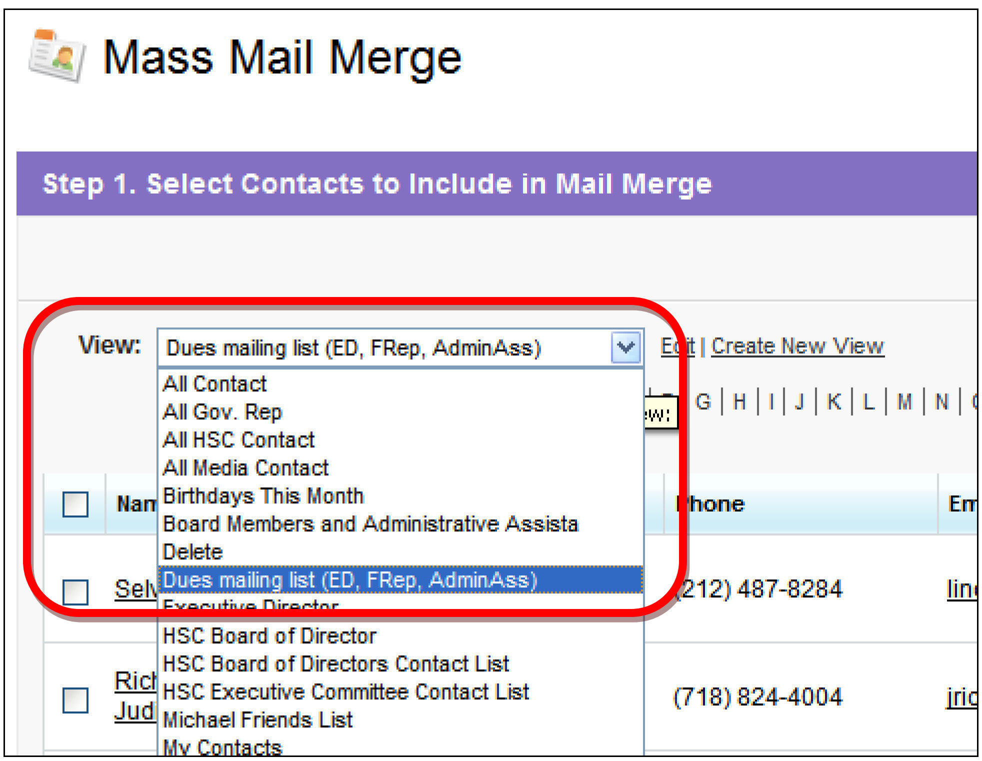


Repeat the steps described above to view the **Annual Dues Invoice (ADI)-FReps&Ad.Ass.** (a list of HSC Financial Representative and Administrative Assistant)

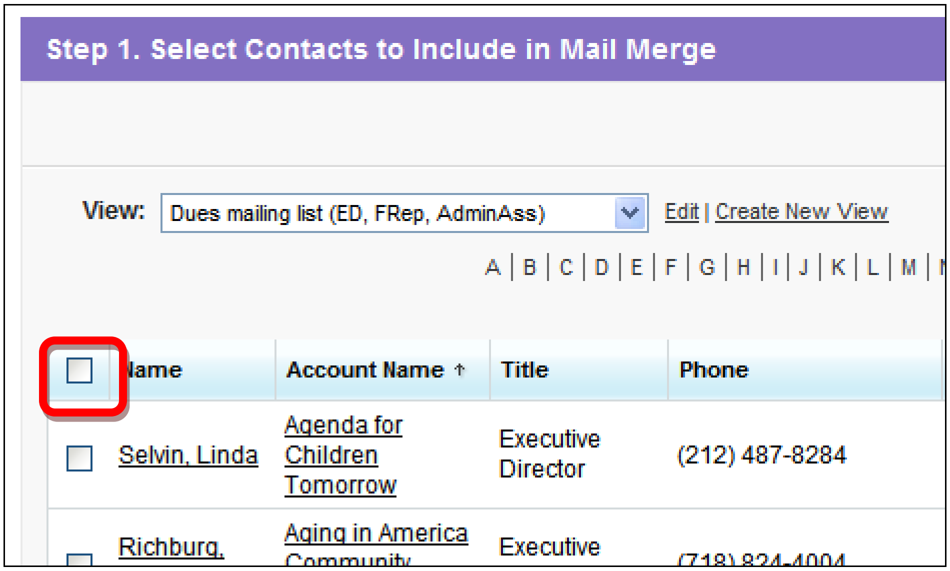
If you want to create and print a **Microsoft Word Version of the Invoice** click on the **Contact Tab** and then on the link **Mass E-mail Merge** under the **Tools** section.



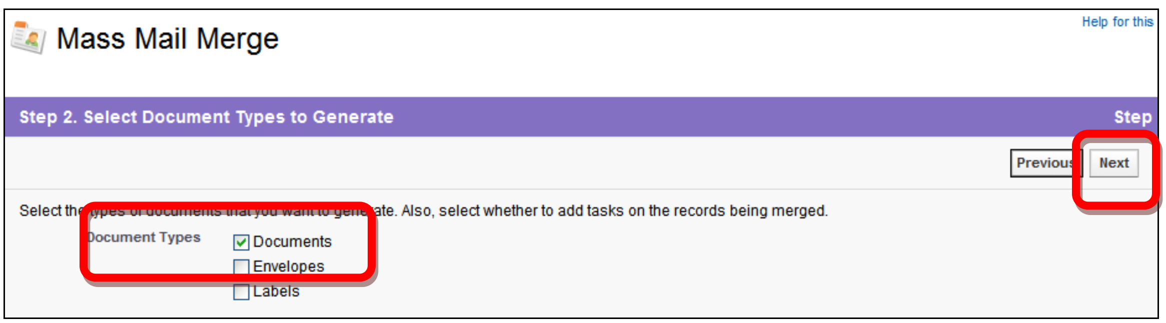
Select the **Dues mailing list (ED, FRep, AdminAss) View.**



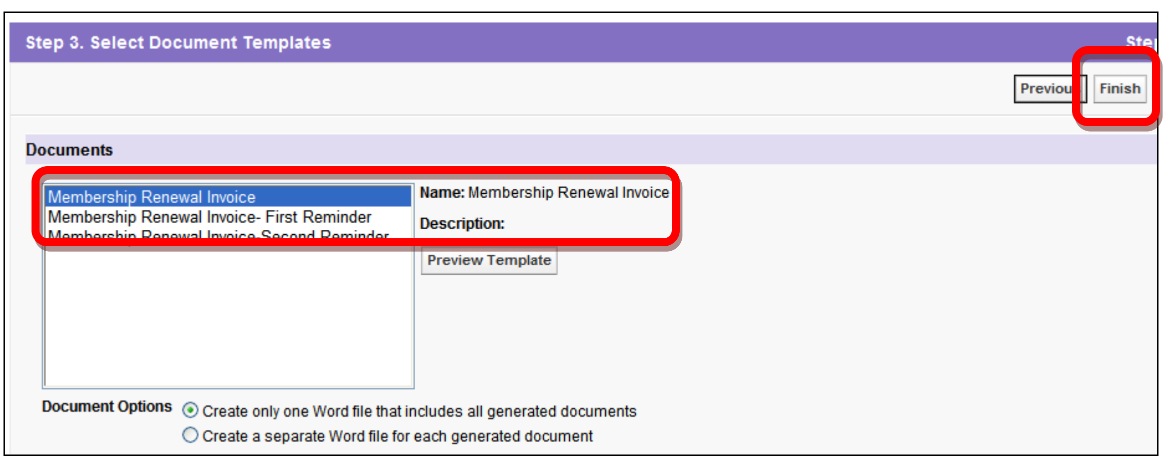
Check the box close the field **Name**



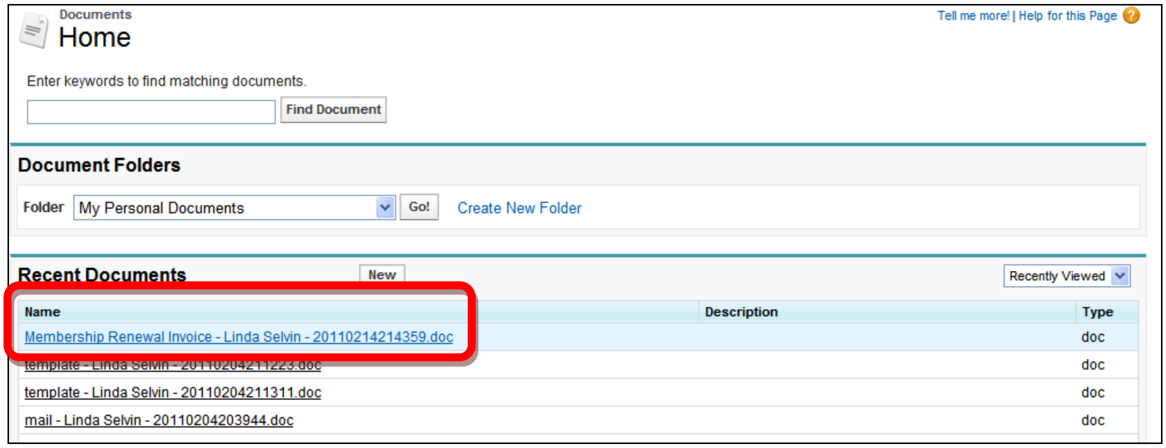
Select the checkbox **Documents.** Click on the **Next** button.



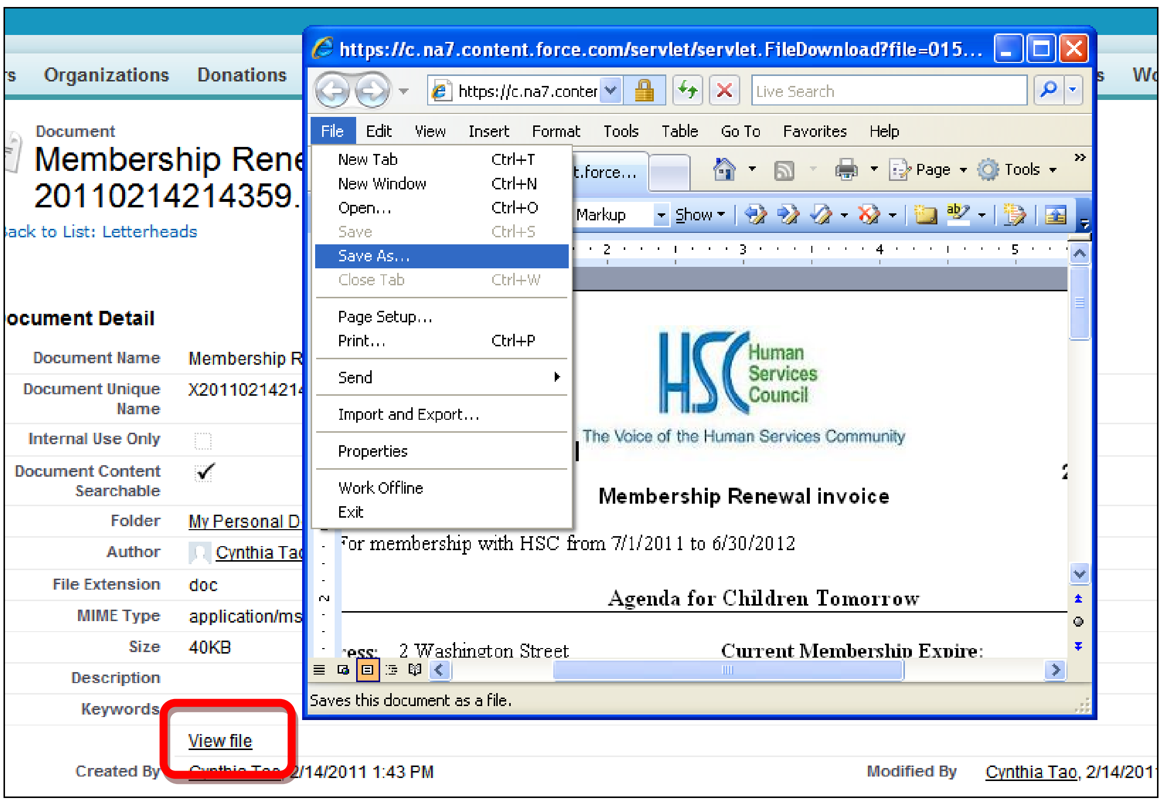
Select a **Document Name**. Click **Finish.**



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



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

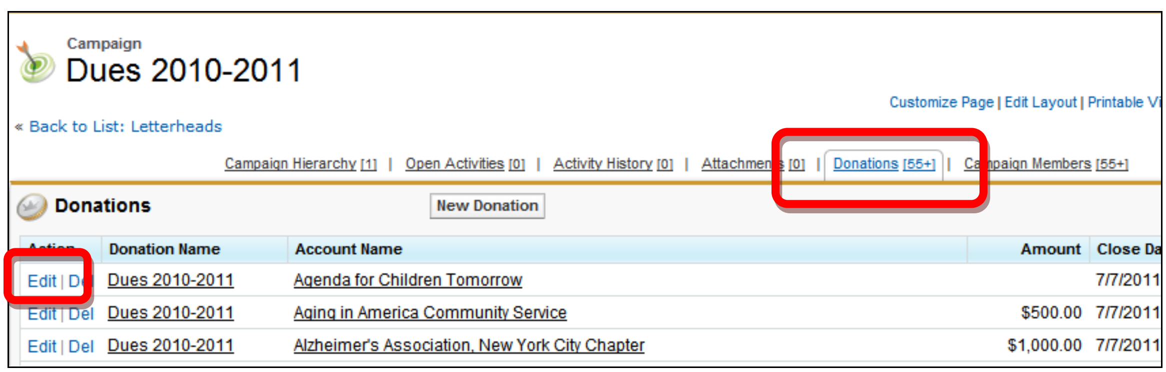


Click **E-mail** if you want to e-mail the document as an attachment.

7. Updating Members' Dues Status

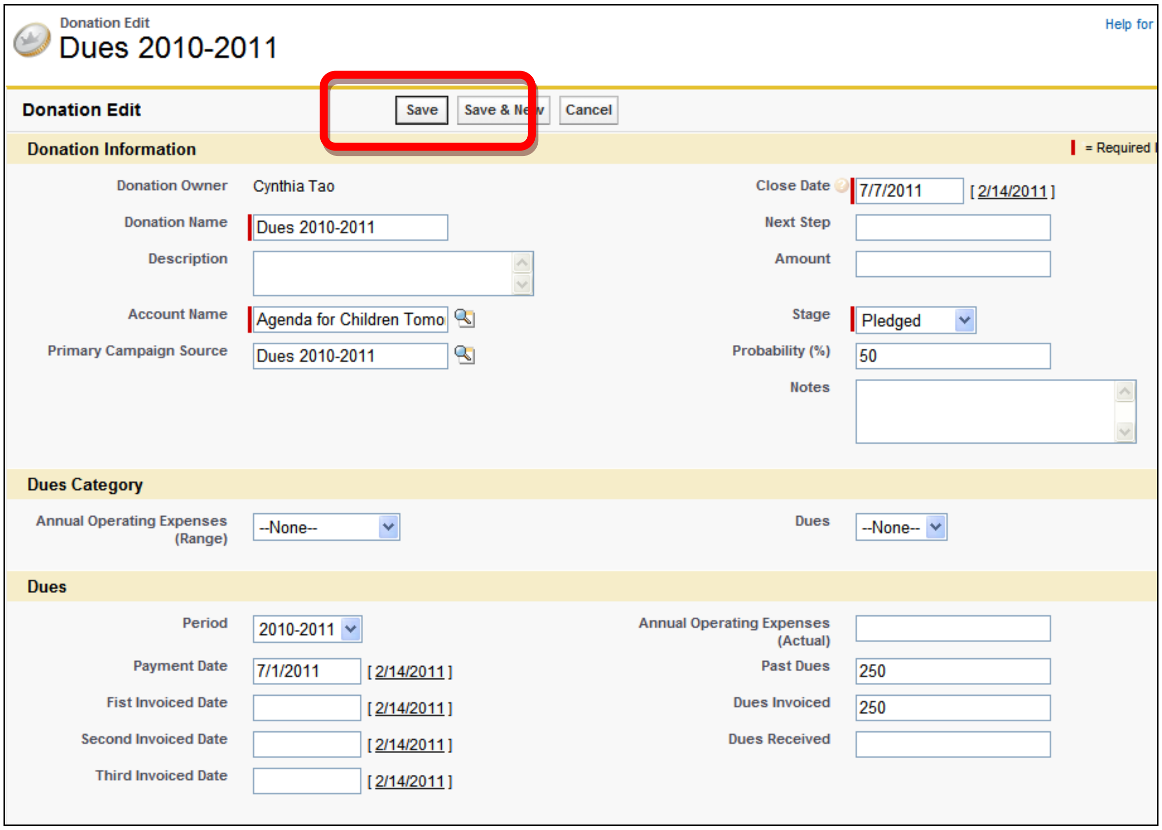
When a member agency pays its dues, it must be recorded in the database. To update the dues record, you start by searching for the appropriate **Dues Campaign** by **Name** using the **Search** box on any screen's header area.

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.



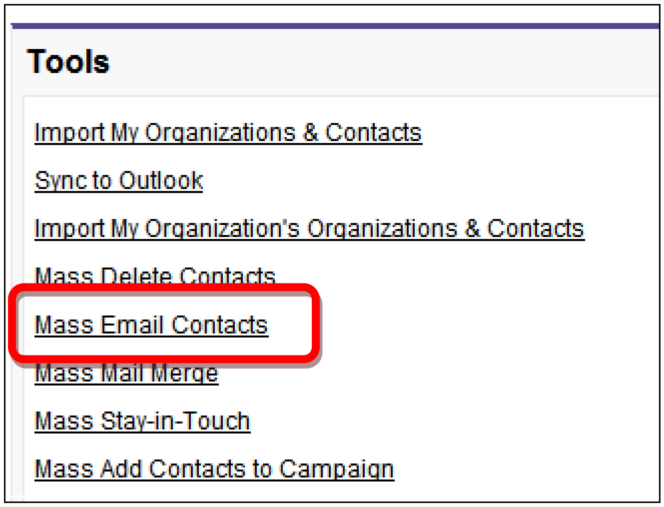
Update the dues fields that you want to change. If you are updating that the member paid its dues, you should fill in all the fields in the **Dues** section, including **Payment Date, Dues Received,** and the appropriate **Invoiced Date.**

Press **Save.** For field details and descriptions see Chapter: Reference Section ;
Paragraph: Object Fields



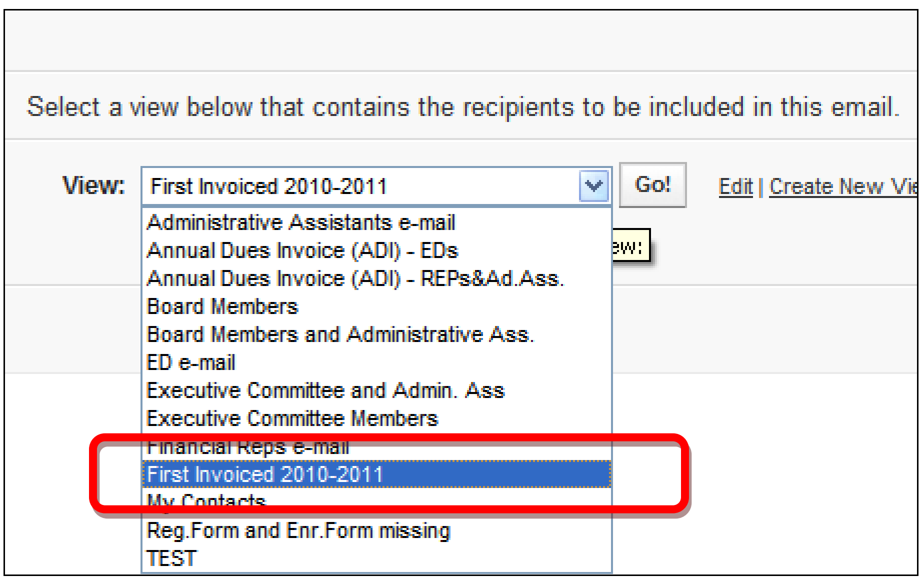
8. Sending Additional Invoices

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.**



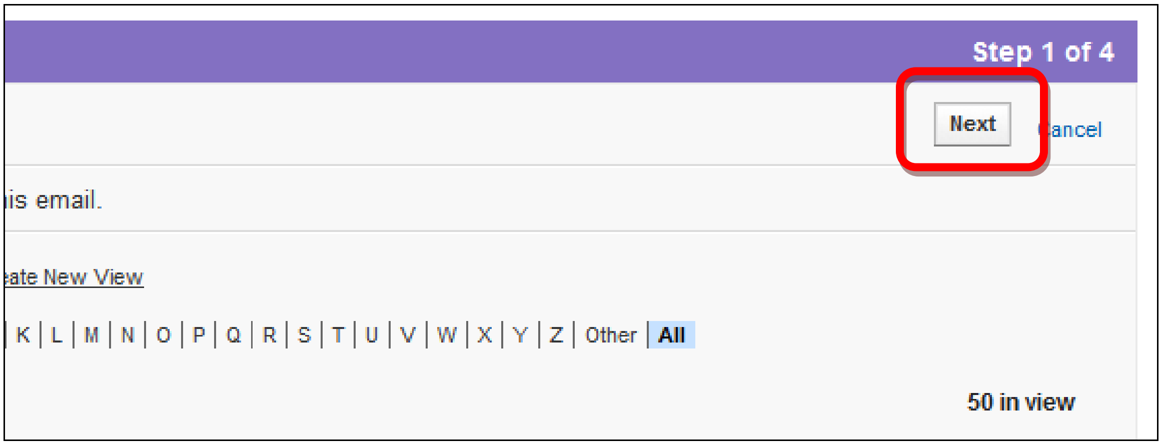
Select the view **First Invoiced *[start membership year – end membership year]*.**

Press the **Go!** button**.**

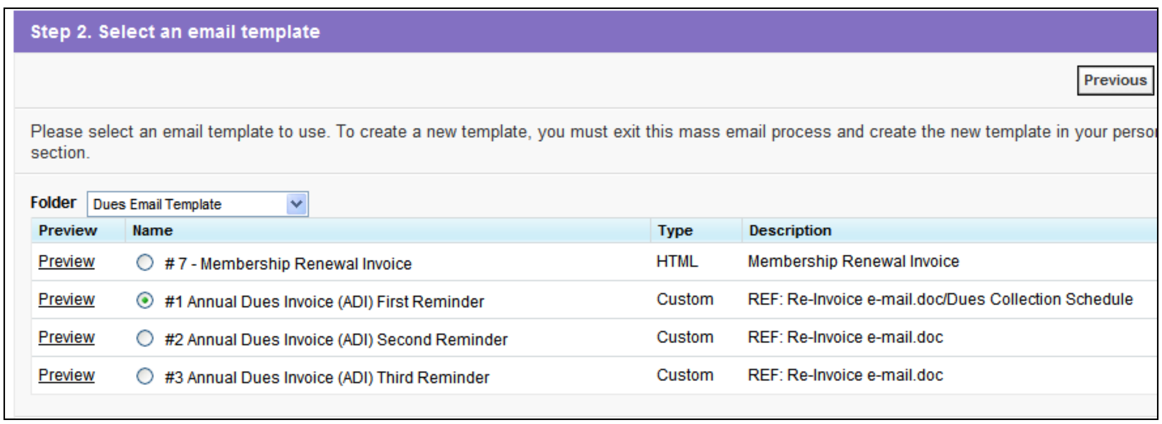


The list (prepared by the SF System administrator) will show EDs, Administrative Assistant, and Financial Rep e-mails of HSC member organizations that have not yet paid their Dues.

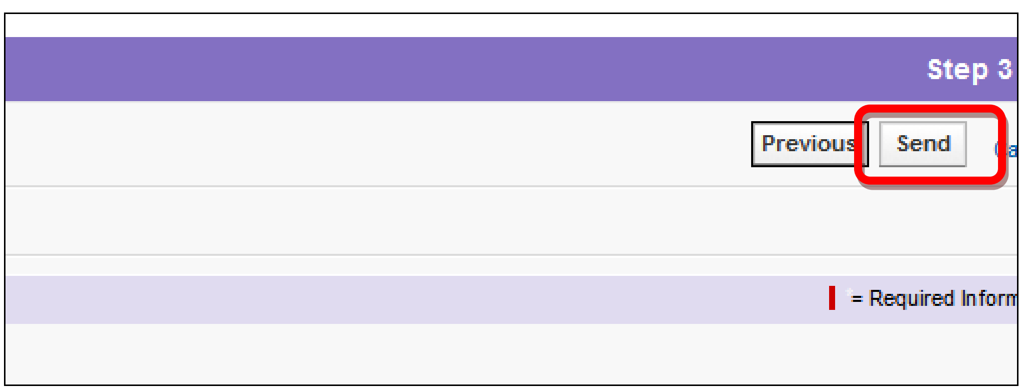
Press **Next**



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



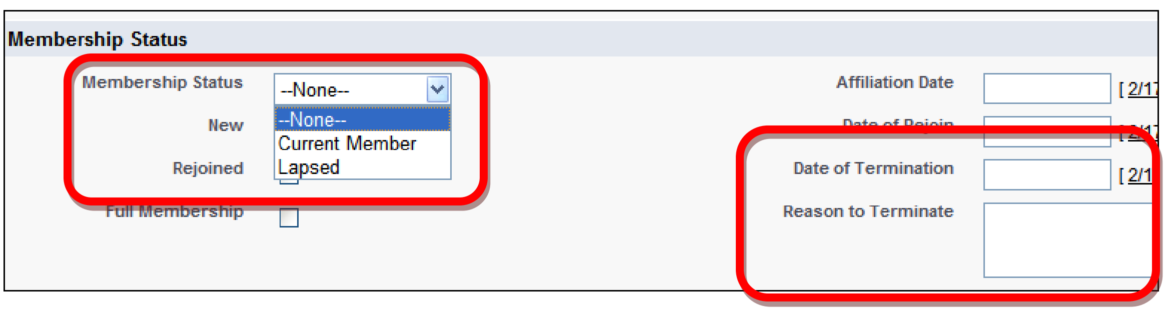
Click **Send.**



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**.



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).

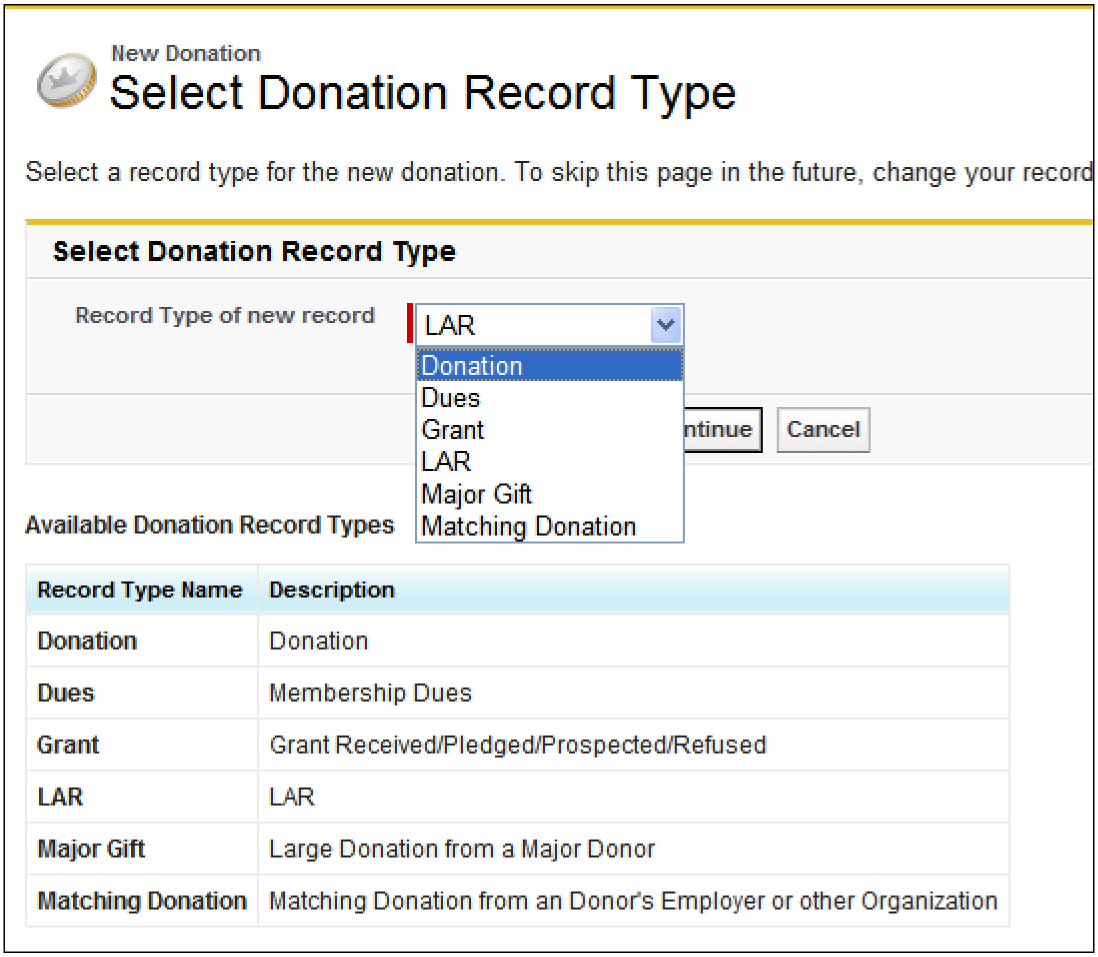
After the campaign is created, you can update the individual's record by first finding the individual by typing his/her name in the **Search** box at the top of any screen. If you click on **Donations** at the top of the **Contact** screen, you will see a list of donations already given by the individual.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

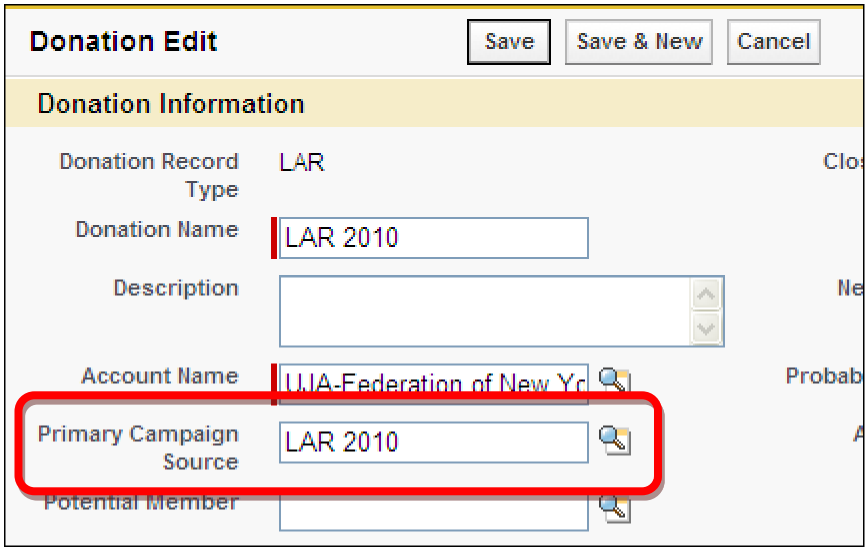
The Dues field is used to track Dues; The field Grant is used for tracking Grant from Foundation or Corporation. Don't use the field Dues and Grant to tack donation.
The field Major Gift and Matching Donation are Salesforce default field not used for HSC tracking purpose.



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

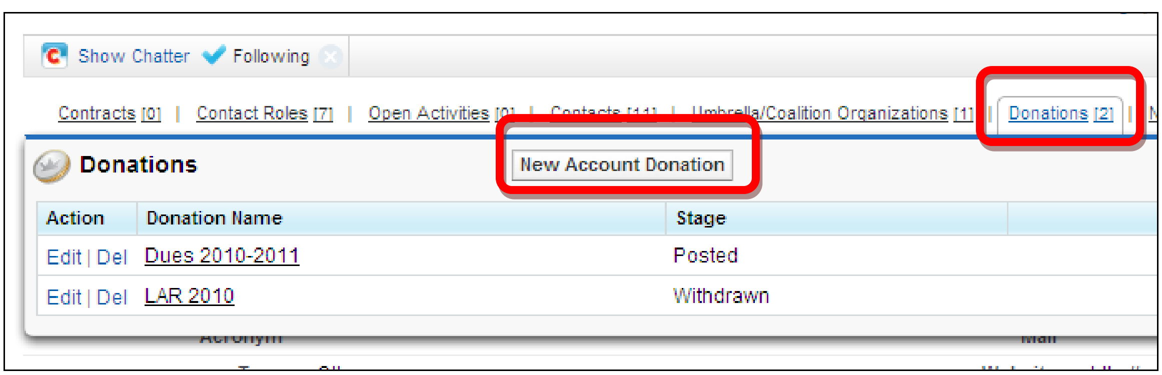
Fill in the record. Use the Campaign name for the required **Donation Name** field. Use the person's name for the required **Account Name** field**.** Review the remainder of the fields and fill them in as appropriate. Press **Save**.

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



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.



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

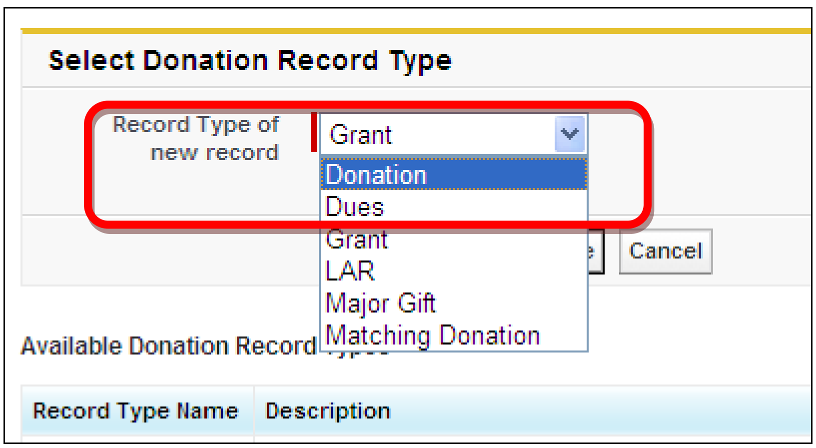
Select the **Record Type of new record** from the drop-down arrowhead among:

To track donation you will use the values:

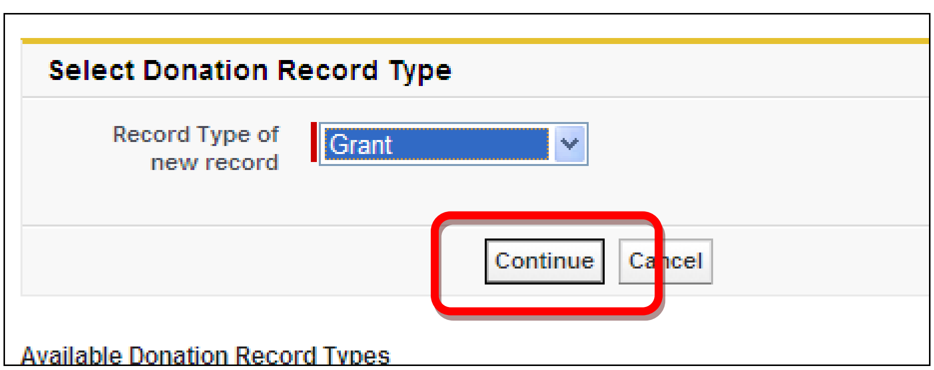
- Donation: if you are tracking a donation (e.g. WCID -Who Cares I Do? - contribution)
- LAR: for LAR donation

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.

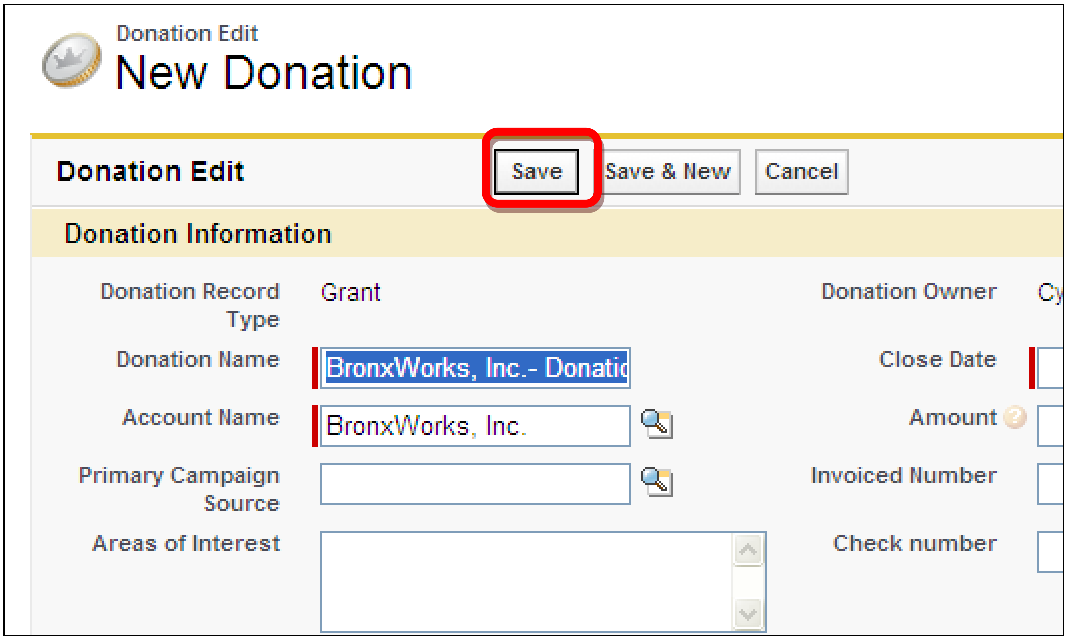
The field Major Gift and Matching Donation are Salesforce default fields not used for HSC tracking purpose.



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

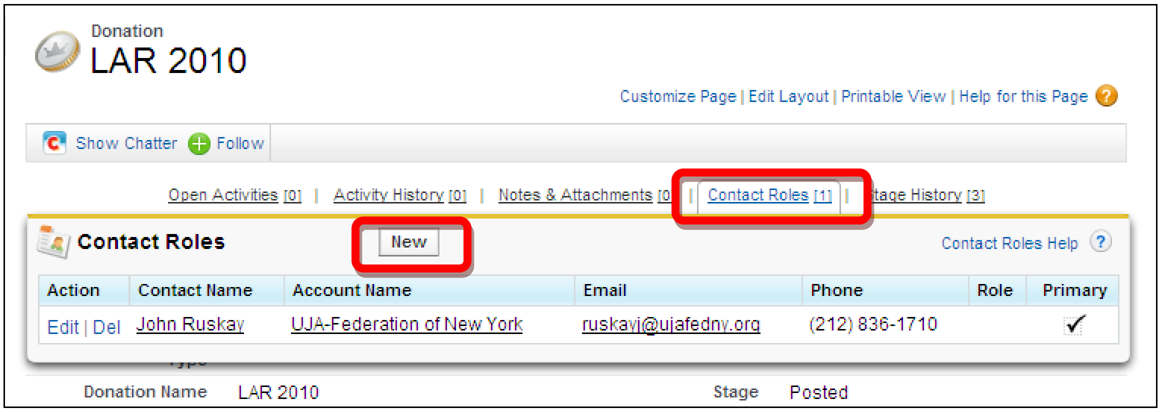


Fill in the record. Use the Campaign name for the required **Donation Name** field. Use the organization's name for the required **Account Name** field. Review the remainder of the fields and fill them in as appropriate. Press **Save**.

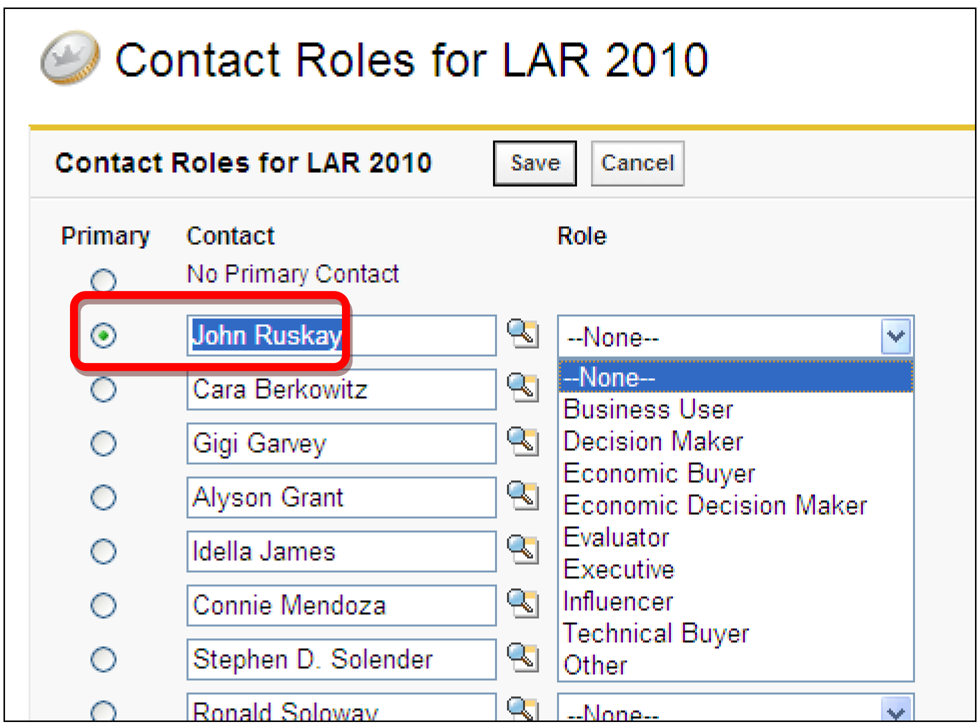


Associating a Donation with Both an Organization and Individual

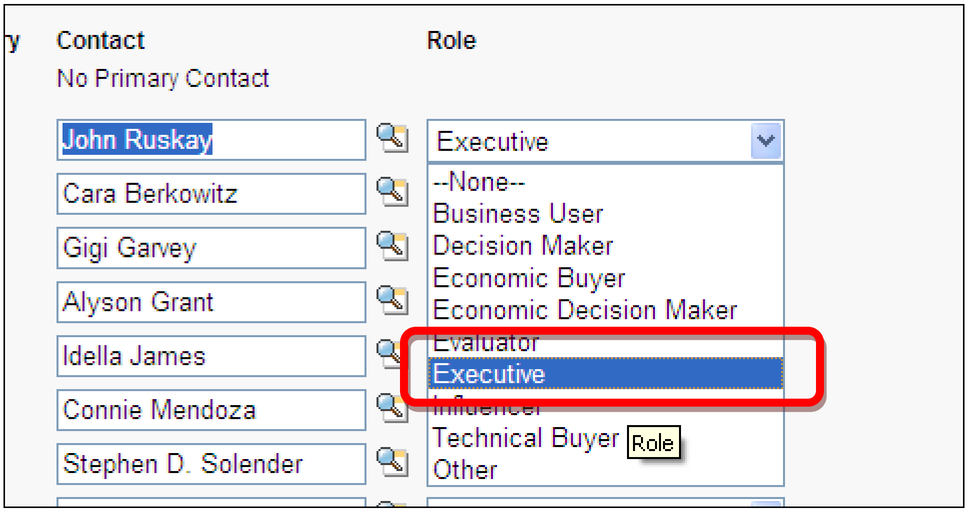
If you want to associate the donation with both an organization and a contact, you can do so after you have linked the donation to the organization, as detailed in the section above. In the **Donation** screen, place your cursor on the **Contact Roles** link, then click on the **New** button in the window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



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.



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



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

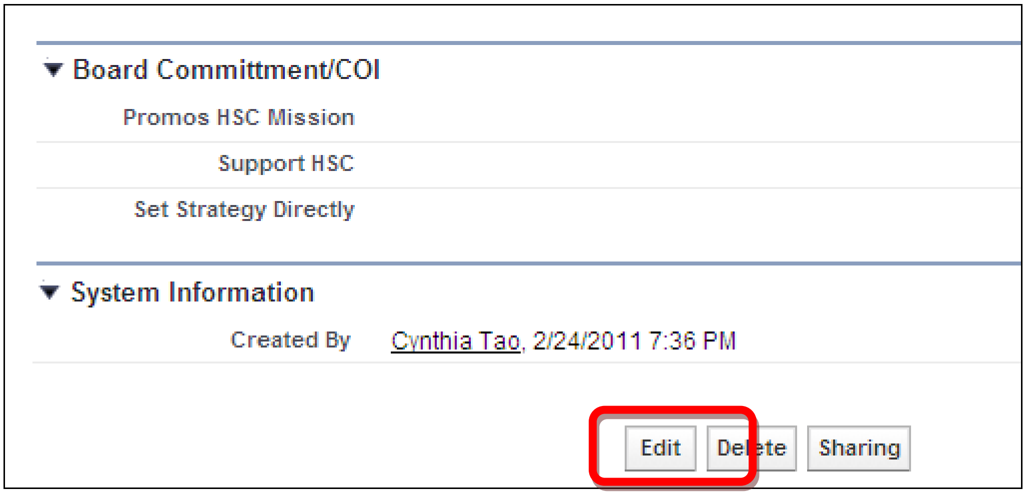
Updating Conflict of Interest and Board Commitment Forms

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**

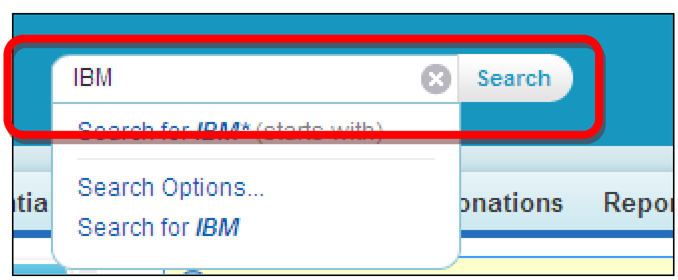


Tracking the Receipt of Foundation Grants

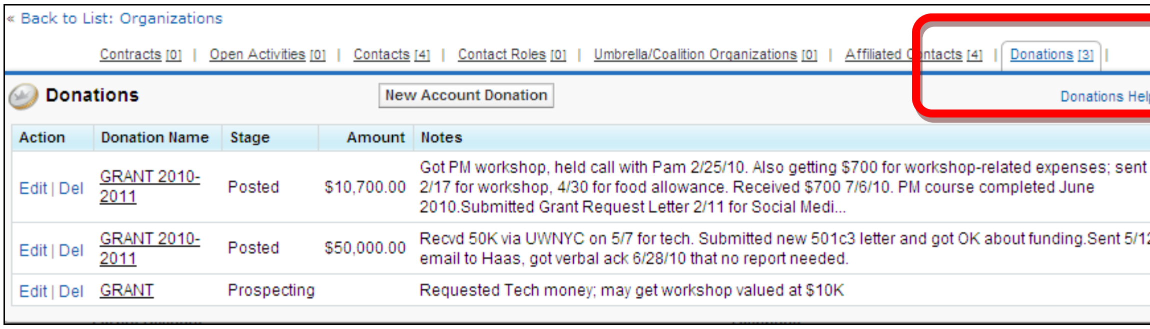
Grants are tracked in Salesforce as **Donations.**

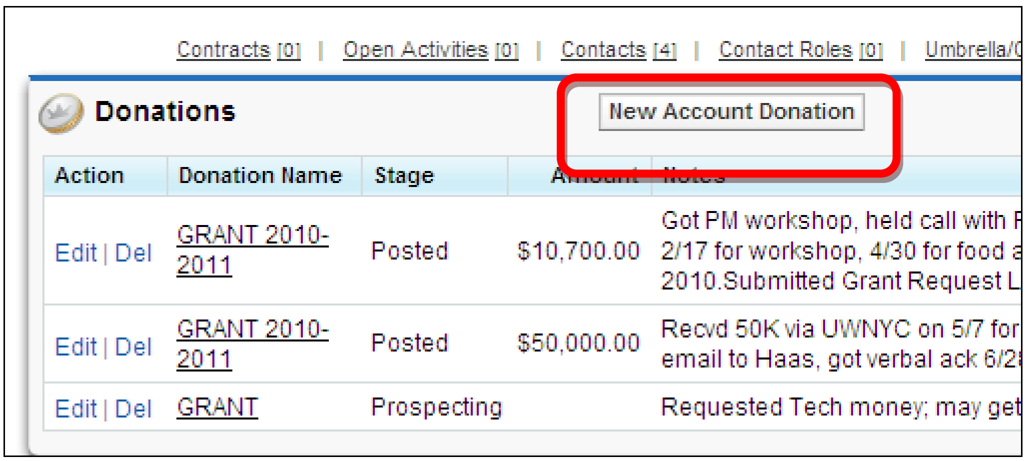
Adding New Grants

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.



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



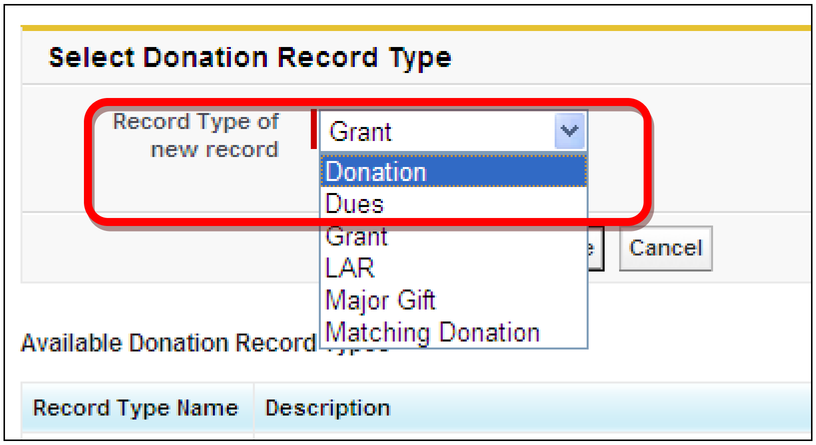


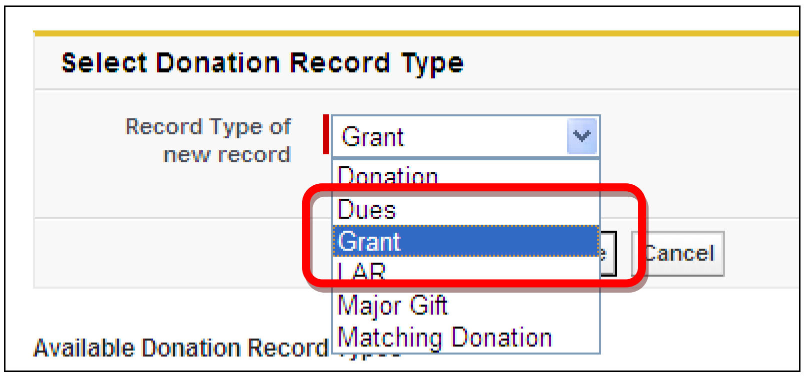
You will go to the **Select Donation Record Type** screen. Select **Grant** as the **Record Type of new record** from the drop-down arrowhead. The field Grant is used for tracking Grant from Foundation or Corporation.

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

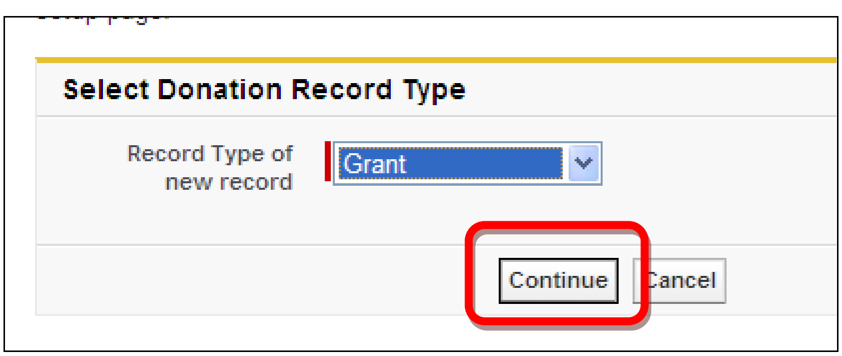
- Donation: is used to track donation as WCID (Who Cares I Do?) contribution
- LAR: is used for LAR donation.

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

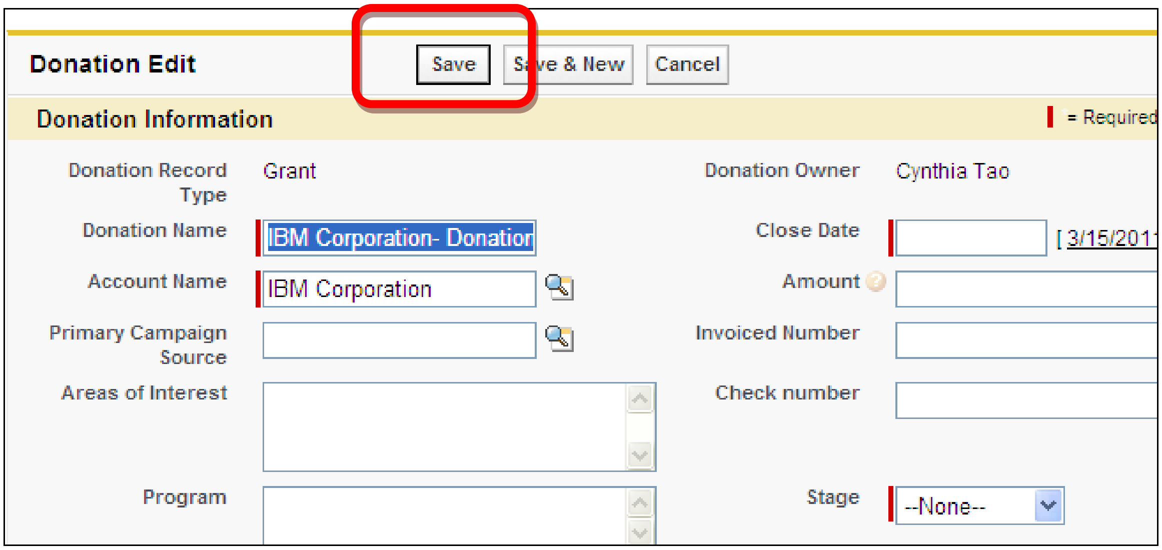




Press **Continue.**



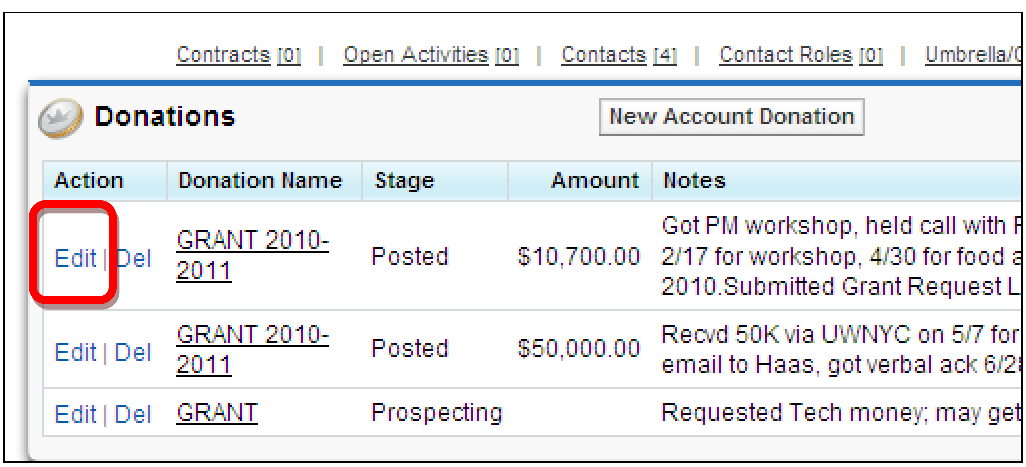
Insert the Grant information. Press **Save.**



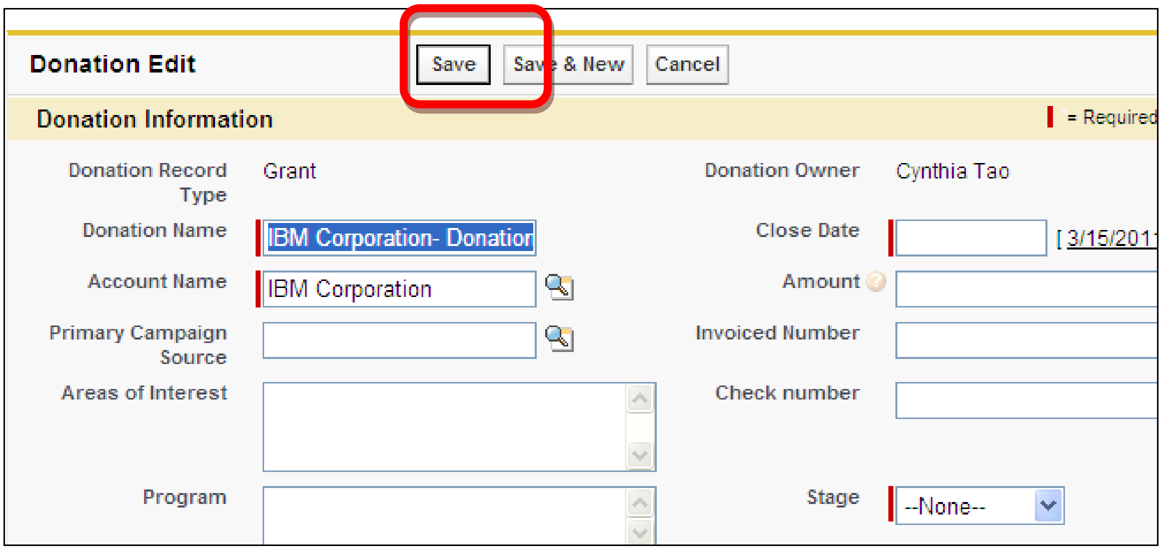
To get more info about the Grant's fields go to the [**Section Object Field >> Donation Fields**]

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.



Update the fields and press **Save**.

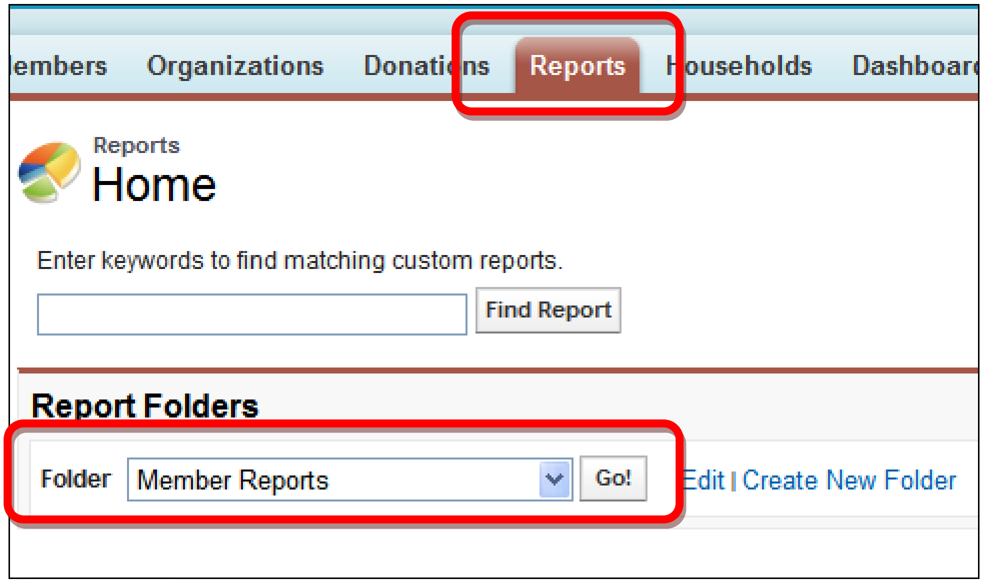


To get more info about the Grant's fields go to the **[Section Object Field >> Donation Fields]**

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.



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
Child Care, Inc.	✓						
Mental Health Association of New York City	✓		✓		✓		
United Way of		✓				✓	

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: Dues 2010-2011 **(191 records)**	$395,250	$308,175
Agenda for Children Tomorrow	$250	-
Aging in America Community Service	$500	$500
Alzheimer's Association, New York City Chapter	$1,000	$1,000
American Group Psychotherapy Association	$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
The Children's Village	Dr. Jeremy Kohomban	✓	☐	jkohomban@childrensvillage.org
Comunilife, Inc.	Dr. Rosa M. Gil	☐	✓	rgil@comunilife.org
Asian American Federation	Mr. Cao O	✓	✓	cao.o@aafederation.org

Black Equity Alliance	Mr. Darwin M. Davis	✓	✓	ddavis@blackequityalliance.org

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

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

Account Name	Full Name	Conflict of Interest	Board Commitment Form Signed	Email
The Children's Village	Dr. Jeremy Kohomban	☐	✓	jkohomban@childrensvillage.org
Comunilife, Inc.	Dr. Rosa M. Gil	✓	☐	rgil@comunilife.org
Asian American Federation	Mr. Cao O	☐	✓	cao.o@aafederation.org
Black Equity Alliance	Mr. Darwin M. Davis	☐	☐	ddavis@blackequityalliance.org

- **#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: Dues 2010-2011 **(45 records)**	$87,000	$0
Agenda for Children Tomorrow	$250	-
Big Brothers/Big Sisters of New York City	$3,000	-
Black Agency Executives	$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: Agenda for Children Tomorrow (2 records)									
Dues 2010-2011	$250	-	Linda Selvin	Former	(212) 487-8284	(212) 487-8284	-	Executive Director	linda.selvin@dfa.state.ny.us
Dues 2010-2011	-	-	Brian McGowen	Current	-	(212) 487-8618	-	Administrative Assistant	brian.mcgowen@dfa.state.ny.us
Account Name: Account Name: Aging in America Community Service (1 record)									
Dues 2010-2011	$500	$500	Judith Richburg	Current	(718) 824-4004	(718) 824-4004	ext. 7935	Executive Director	jrichburg@aiamsh.org

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: Agenda for Children Tomorrow **(1 record)**							
						$250.00	
2 Washington Street 20th Floor	New York	Brooklyn	11221	-	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: Agenda for Children Tomorrow **(1 record)**		
	$250.00	
Account Name: Barrier Free Living **(2 records)**		
	$1,000.00	
Account Name: Bronx Jewish Community Council **(5 records)**		
	$500.00	
Account Name: Catholic Charities Community Services, Archdiocese of New York **(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: CAMBA **(35 records)**				$7,500.00
Full Name: Joanne M. Oplustil **(35 records)**				
Billing Address: 1720 Church Avenue 2nd Floor, Brooklyn, NY 11226 **(35 records)**				
Brooklyn	11223	-	Youth Services	
Brooklyn	11226	-	Youth Services	
Brooklyn	11216	-	Youth Services	

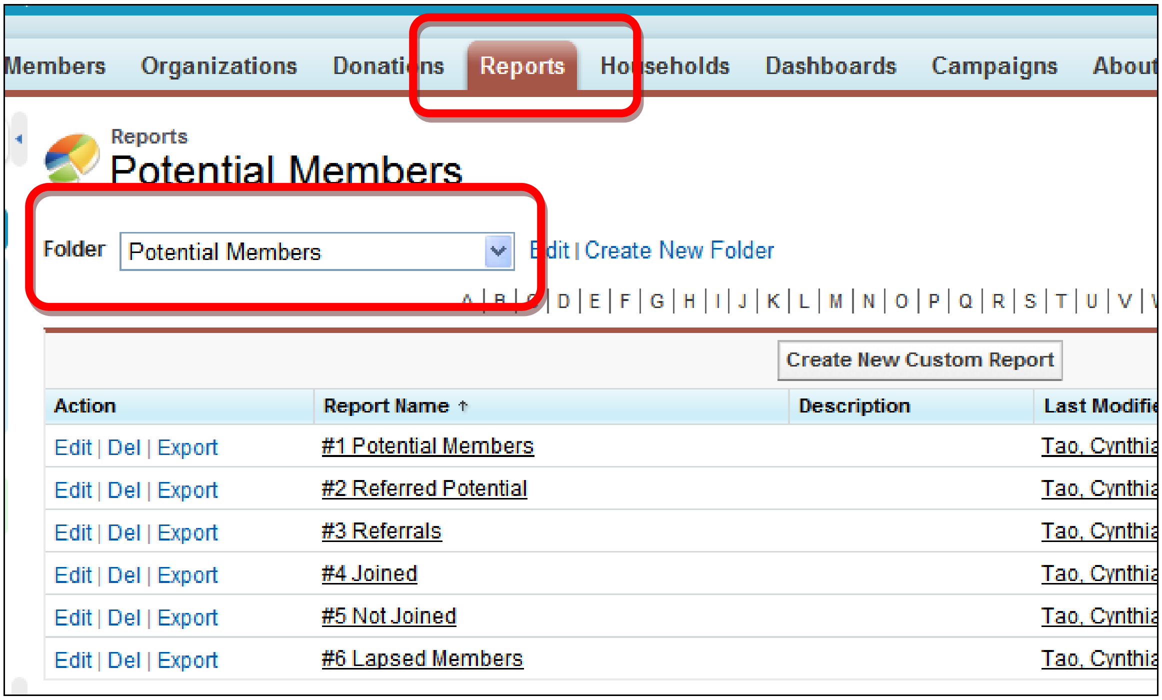
- **Brooklyn Based Organization**

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
Baltic Street AEH, Inc.	250 Baltic Street 1st Floor	Brooklyn	11201	Isaac	Brown	☐	$500	$500
BHRAGS Home Care Corp.	444 Thomas S. Boyland St.	Brooklyn	11212	Eve	Vaval	☐	$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.



- **#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 tho 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: ? (individual) (1 record)									
Ms.	Tanya	Brown	-	✓	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
Mutual of America	Mr.	Dragone	Vincent	VP		-	-	-	-	-	vincent.dragone@mutualofamerica.com
Nonprofit Coordinating Committee of New York	Mr.	Marvin	Cipore	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: Bronx House **(1 record)**										
Mr.	Howard	Martin	-	JOINED	1/18/2011	-	-	-	-	e-mails? 4/1, 4/21, 4/22, 5/14, 5/15;
Company / Account: Career Gear **(1 record)**										
Mr.	Sanful	John	-	JOINED	-	-	-	-	johns@care	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: Association for Services for the Aged **(1 record)**									
Mr.	Tom	Grogan	Director of Fiscal Operations	NOT JOINING	-	(718) 707-9696	x 3101	thomas@afsabk.org	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: Black Equity Alliance **(1 record)**									
-	Rasul	Miller	-	-	-	-	-	rmiller@blackequityalliance.org	-
Account Name: Bronx House **(1 record)**									

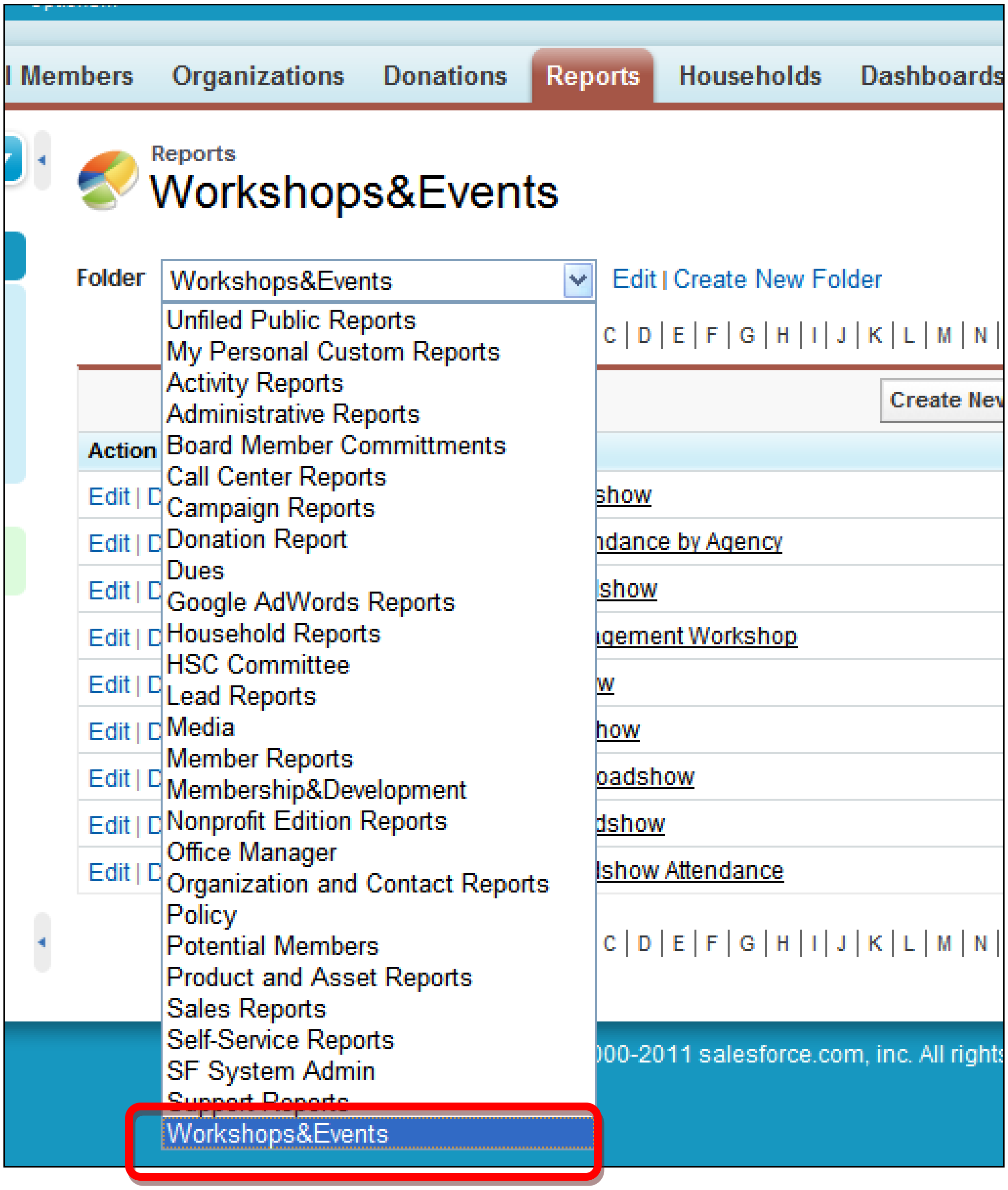
Mr.	Howard	Martin	-	-	-	-	-	-	-
Account Name: Connect, Inc. **(1 record)**									
-	Janet	Samuels	-	-	(212) 683-0015	(212) 683-0015	-	jsamuels@connectnyc.org	-
Account Name: Cypress Hills Local Development Corporation **(2 records)**									
-	Michelle	Neugebauer	-	ED	(718) 647-2800	-	-	michellen@cypresshills.org	-
-	Emily	Van Ingen	-	Deputy Director	(718) 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: Brooklyn Roadshow **(72 records)**							
Campaign Name: Brooklyn Roadshow - Session 1 **(36 records)**						36	30
Company: [not provided] **(1 record)**							
Dana	Hammond	-	Potential Member	-	☐		
Company: Asian Community United Society **(1 record)**							
Warren	Chan	Executive Director	Potential Member	-	✓		
Company: Brooklyn Community Services **(4 records)**							
Alan D.	Goodman	Executive Director	Contact	-	☐		
Ana	Espinal	Supervisor/ case coordinator	Contact	-	✓		
Leslie	Klein	Director, ARS	Contact	-	✓		
Marilyn	Millien-Harris	Homemaker Program Director	Contact	-	✓		

- **#9 Workshop & Roadshow Attendance**

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

	# Responded	# Attended

Campaign Name: IBM Project Management Workshop **(33 records)**	33	13
Company: Aging in America Community Service **(1 record)**		
Company: Black Veterans for Social Justice **(1 record)**		
Company: 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
Company: Agenda for Children Tomorrow **(3 records)**		
Campaign Name: Manhattan Roadshow 10-19-10 **(1 record)**		
Linda	Selvin	☐
Campaign Name: Manhattan Roadshow 9-21-10 **(1 record)**		
Linda	Selvin	☐
Campaign Name: White Ink marketing workshop 9.28.10 **(1 record)**		
Deborah	Rubien	☑

HSC Committee Reports

- **#1 HSC Committee by Organization**

List of HSC Committee members by Organization

	First Name	Last Name	Title	AARG	Compensation	Contract Refor	Disaster Preparedness &	Finance/Personnel	Governance	Technology and Referral

						m	Respons e			
☐	**Account Name:** Alzheimer's Association, New York City Chapter **(1 record)**									
	Eugenia	Dorisca	-	✓	☐	☐	☐	☐	☐	☐
☐	**Account Name:** Asian American Federation **(2 records)**									
	Hong	Lee	-	✓	☐	☐	☐	☐	☐	☐
	Cao	O	Executive Director	☐	☐	☐	☐	☐	✓	☐

- **#2 HSC Committee – AARG**

List of AARG HSC Committee Members

First Name	Last Name	Title
Account Name: Alzheimer's Association, New York City Chapter **(1 record)**		
Eugenia	Dorisca	-
Account Name: Asian American Federation **(1 record)**		
Hong	Lee	-

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
Altman Foundation	Disaster Preparedness & Response	$36,887.00	12/28/2007	Applied to 2008-2009; using up previous unmatched grant	12/11/2008
New York Community Trust	Workforce	$50,000.00	7/1/2006	-	-
New York Community Trust	Contracting	$50,000.00	5/1/2007	-	-
New York Community Trust	One New York	$25,000.00	3/10/2009	total grant of 153K to UNH	-
New York Community Trust	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

First Name	Account Name: Altman Foundation (4 records)		Sonali	Deborah Thompson	Jane B.	Karen L.
Last Name			Mukerjee	Velazquez	O'Connell	Rosa
Title			Grants Manager	Sr Program Officer	President	Vice Presider Executive Dir
Notes			-	-	-	-
Email			-	dthompson@altman.org	-	krosa@altma
Address			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 35 Flo Ne Yo NY 10 35
Phone			(212) 682-0970	(212) 682-0970	(212) 682-0970	(212) 682-09
Direct Phone			-	-	-	-
Direct Phone Ext.			-	-	-	-
Mobile Phone			-	-	-	-
Fax			(212) 682-1648	(212) 682-1648	(212) 682-1648	(212) 682-16
Member Contact			-	Terry Bischoff	-	Terry Bischof
Assistant			-	-	-	-
Asst. Phone			-	-	-	-
Asst. Email			-	-	-	-
Website			-	-	-	-
Notes			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)*

Account Name	Altman Foundation	Scherman Foundation, Inc.
Areas of Interest	Disaster Preparedness & Response	environment, international peace/security, reproductive rights/services, human rights &

			liberties, arts, social welfare, civil rights
Target Amount		$100,000	-
Amount		-	-
Government Grant			
Notes	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
Date Initial Contact		12/28/2007	-
Proposal Due		-	-
Proposal Due (Notes)	no deadline		No deadlines -- submit letter with approporiate backup material
HSC Action Required	Awaiting KS response to Rosa letter. MS to follow up -- ON HOLD;		-
Next Target Contact Date		-	
Next Target Contact Date (Notes)	March		
Stage	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.

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

Target Amount (Range)			$ 20.000
Notes			were interested in BDB (reported 4/09) and asked to reapproach in Fall 09
Date Initial Contact			1/1/2009-
HSC Action Required			reopen lines of communication?
Proposal Due			1/5/2011
Proposal Due (Notes)			
Next Target Contact Date			3/6/2011-
Next Target Contact Date (Notes)			-
Board/Staff Contacts with Funder			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: Altman Foundation **(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 custom 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 Commitee
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).

<u>Custom Fields</u>

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 Phoone 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

<u>Salesforce Fields</u>

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	Name of the campaign responsible for generating the donation. 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. 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. For opportunities with multiple influential campaigns, click **Edit** 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.
Probability	Percentage of estimated confidence in closing the donation.
Notes	User’s notes
Stage	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. Your administrator correlates the values in this picklist with Forecast Category values that determine how the donation contributes to your forecast. When you set an open donation's Stage to a type of “Closed/Won,” the Close Date is set to the current date.

Custom Fields

Field	Description
#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

Field	Description
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

<u>Salesforce Fields</u>

Field	**Description**
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.

<u>Custom Fields</u>

Field	Description
Period	Dropdown list. Fiscal Year Start – Fiscal Year End **(e.g. 2009-2010).**
Due dates	Last date the dues should be paid.
Fist 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.