Salesforce Navy League Honolulu Council Procedures Manual

April, 2020
Honolulu, Hawaii

Introduction to Salesforce

The Salesforce version used by Navy League Honolulu Council (NLHC) is tailored for non-profits and is called the Non-Profit Success Pack or NPSP. NPSP is an out-of-the-box solution for managing relationships, fundraising, programs, reporting, and more. It is fully customizable, so our council can track everything that matters, all in one secure and customizable cloud based CRM software application.

Navy League Honolulu Council has been gifted 10 NPSP licenses by the Salesforce Foundation, a tax-exempt 501(c)(3) nonprofit organization that funds initiatives aligned with Salesforce's Education and Workforce Development strategies.

Over time, as we use Salesforce in our Navy League council, we will be able to add functionality. As a minimum, our initial implementation should include management of our member roster, updates and synchronization of our roster with our national organization and management of a sponsorship and donor pipeline.

Excellent detailed step by step instructions, with illustrations (screenshots) are included in this first edition manual.

Free online Salesforce NPSP training is available online and the training will be documented. Click on "Getting started with Salesforce and NPSP Trailblazer" below the Trailhead logo and log in using your Salesforce account.
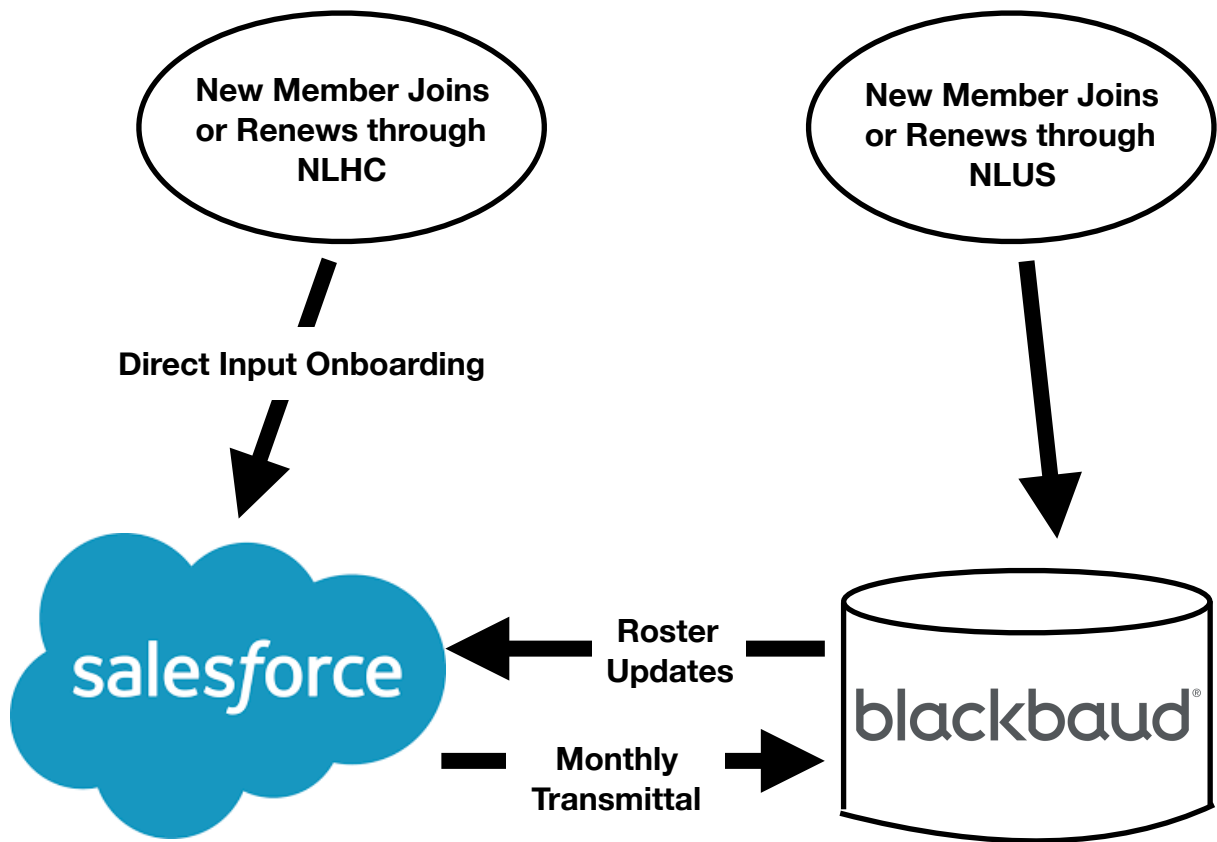
Trails: follow guided learning paths

Trails are guided learning paths through modules and projects that help you cover the most ground in the shortest amount of time. Consider them your personal game plan for exploring new skills.

Find the right trails for you   Clear filters

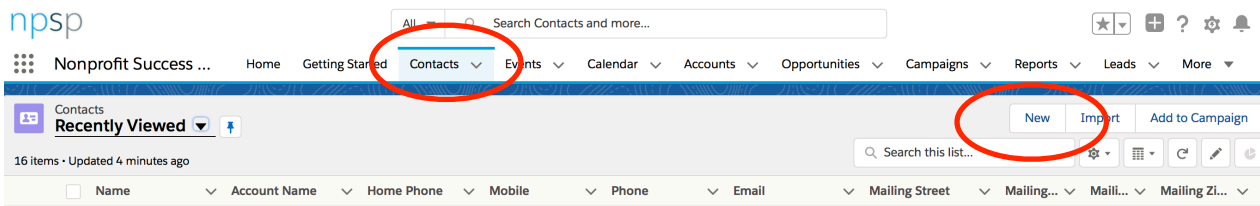| Your role	Your level	Products		Tags (16)	
Admin	Beginner	Commerce Cloud	MuleSoft	Apex	Heroku
Business User	Intermediate	Community Cloud	Nonprofit Cloud	App Lifecycle	Industries
Developer	Advanced	Education Cloud	Pardot	App Logic	Integration

As our council realizes and implements new capabilities in Salesforce the procedures should be documented by updating this manual.

Navy League Honolulu Council Roster Maintenance

New Member Joins or Renews through NLHC

New Member Joins or Renews through NLUS

Direct Input Onboarding

salesforce

blackbaud®

Roster Updates

Monthly Transmittal

On-boarding a New Member

1. New members are entered as contacts.   Click on Contacts and New.

2. Fill out the form that pops into view.

New Contact

Contact Details

* Name	Salutation	
	--None--	
	First Name	
	Middle Name	
	* Last Name	
Title		
Council Affiliation	Honolulu	
Navy League Sponsor	Jane Ferreira	
Suffix 1		

Account Info

Account Name	Search Accounts...	Primary Affiliation	Search Accounts...
		Additional Contact Affiliations	

Membership Details

Board Member	☐	Office Held	None
NLHC BoD Term Expires	N/A	Past President	☐
National Director	☐	Honolulu Council Advisor	☐
National Director Term Expires	N/A	Professional Staff	No

Committees

Committee Membership ⓘ

Available

Membership
Finance
Communications
Programs
Executive

▶

◀

Chosen

None

Membership Information

Membership ID ⓘ	[ ]	Membership Join Date ⓘ	[📅]
Member Type	--None-- ▼	Membership Purchase/Renewal Date ⓘ	[📅]
Last Membership Amount	$0.00	Membership Expiration Date ⓘ	[📅]
NLHC Membership Card Mailed ⓘ	[📅]	Renewal Letter Mailed ⓘ	[📅]
Bridge Membership	None ▼	Membership Standing	Active ▼
Bridge Membership Expiration Date ⓘ	[📅]	ID/Status	[ ]
Member Notes	[ ]		

Contact Information

Home Phone	[ ]	Email	[ ]
Mobile	[ ]	Personal Email ⓘ	[ ]
Work Phone ⓘ	[ ]	Work Email ⓘ	[ ]
Do Not Call	☐	Email Opt Out	☐

Mailing Address

🔍 Search Address

Mailing Street

[   ]

Mailing City	Mailing State/Province
[ ]	[ ]
Mailing Zip/Postal Code	Mailing Country
[ ]	[ ]

DBIDS

3.

DBIDS Request Submitted to JBPHH ⓘ	[📅]	DBIDS Request Submitted to MCBH ⓘ	[📅]
JBPHH DBIDS Card Status ⓘ	--None-- ▼	MCBH DBIDS Card Status ⓘ	Submitted ▼

Click on Save and the new member will be entered as a contact. A new Household account will also be created.

Creating a Transmittal Form for NLUS in Salesforce
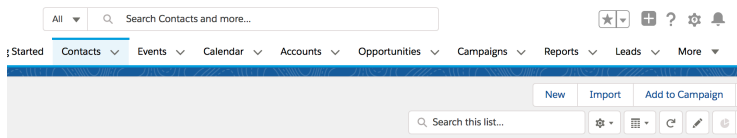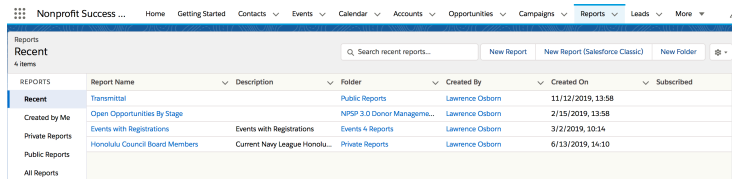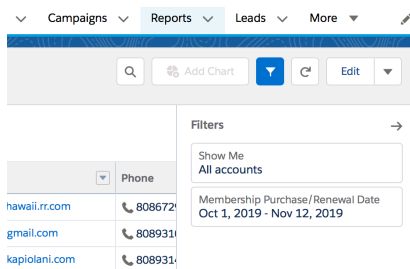
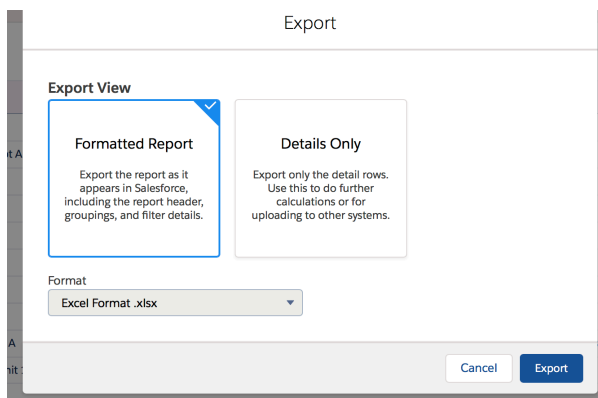1. Click on Reports

2. Select "Transmittal".

3. Click on the filter icon and set the appropriate dates under "Membership Purchase/ Renewal Dates".

4. Refresh the report.
5. Export the report as a "Formatted Report" to Excel format.

6. Open the newly created file in Excel and add a column for Amount and enter additional column(s) as appropriate, such as amount collected and remitted to national.
7. Format as desired.

Updating NLHC Salesforce member data from NLUS Roster

1. Open the roster in Excel or Numbers.
2. Review and clean the data, checking the Email column for proper format.
3. If the street address and apartment number are separate columns, proceed as directed below to create a new column after "Preferred Address Line 3" as described in steps 4 and 5.
4. Label the new header on this column "Contact: Mailing Street . Enter a formula in the first record under "Mailing Street" to combine (concatenate) the text (strings) from "Address Line 1" and "Address Line 2" entries adding spaces to create a complete street address. Example "123 Peach Street Apt 3A. (See details below.)
5. Copy this formula for all all records in the "Mailing Street" column.
6. Export or convert the Excel or Numbers file to .cvs format and save.
7. Open Salesforce and select "Contacts".
8. Click on "Import".
9. On the next screen select "Accounts and Contacts" and "Add new and update existing records", and "CSV".
10. Choose the CSV file you wish to import. Select "Next".
11. Review the mapping (see "Mapping Salesforce Contact Fields for Data Import" below). When it is correct, click on "Next".
12. Click on "Start Import". All contacts entered this way will also create "Household" accounts.

Combining Text in Columns to Create a Complete Street Address

To concatenate cells in:
Excel
Select a cell where you want to enter the formula.
Type =CONCATENATE(in that cell or in the formula bar.
Press and hold Ctrl and click on each cell you want to concatenate.
Release the Ctrl button, type the closing parenthesis in the formula bar and press Enter.
Numbers
Select a cell where you want to enter the formula.
Type =in that cell.
Click on the first cell you want to include, type &, " " to add a space, and then click on the second value
Click the green checkbox to complete the formula entry

Do not use Last Membership Date or Membership End Date fields. Use Membership Join Date (member first joined), Membership Purchase/Renewal Date, or Membership Expiration Date only.

Mapping Salesforce Contact Fields for Data Import

Edit	Mapped Salesforce Object	CSV Header
Change	Contact: Membership ID	Constituent ID
Change	Contact: Name	Name
Map	**Unmapped**	Last Name
Map	**Unmapped**	First Name
Map	**Unmapped**	Organization Name
Map	**Unmapped**	Preferred Address Line 1
Map	**Unmapped**	Preferred Address Line 2
Change	Contact: Mailing Street	Street Address
Change	Contact: Mailing City	Preferred City
Change	Contact: Mailing State/Province	Preferred State
Change	Contact: Mailing Zip/Postal Code	Preferred ZIP/Postal Code
Map	**Unmapped**	No Valid Addresses?
Change	Contact: Email	Email Number
Change	Contact: Work Phone	Business Number
Change	Contact: Mobile	Cell Number
Change	Contact: Home Phone	Home Number
Change	Contact: Member Type	Member Type
Change	Contact: Membership Join Date	Join Date
Change	Contact: Membership Expiration Date	Expiration Date
Change	Contact: Membership Standing	Standing
Change	Contact: Council Affiliation	Council

Creating Transmittal Form for NLUS in Salesforce
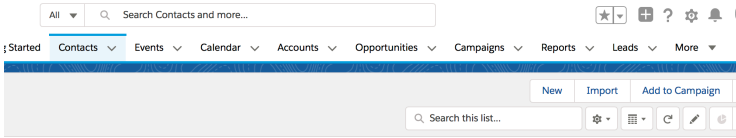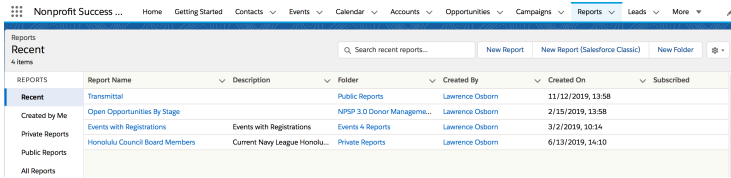
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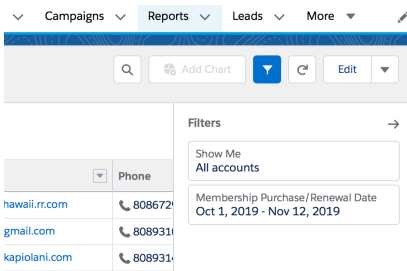
4. Refresh the report.
5. Export the report as a "Formatted Report" to Excel format.
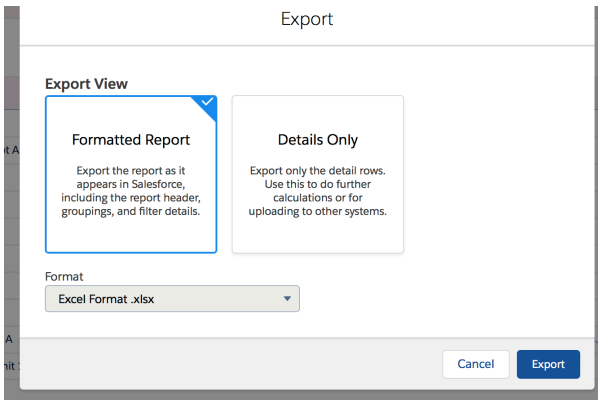
6. Open the newly created file in Excel and add a column for Amount and enter values as appropriate.
7. Format as desired.

Creating Organizational Accounts and Opportunities

The Salesforce version used by Navy League Honolulu Council (NLHC) is tailored for non-profits and is called the Non-Profit Success Pack or NPSP. When a contact is created in NPSP, a Household Account is created. To enter Organizational Accounts (such as companies that sponsor and donate money to Navy League) we can add Accounts and choose the option to enter an Organizational account.

1. Select Accounts and click on New.
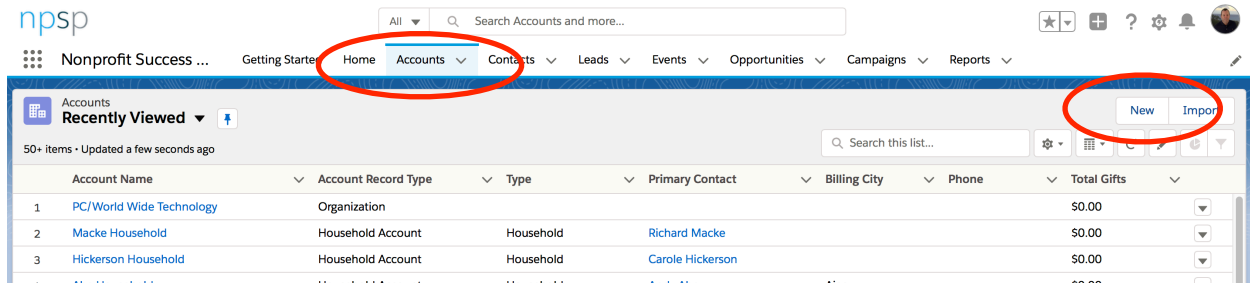
2. Select Organization as the record type. Click on New.
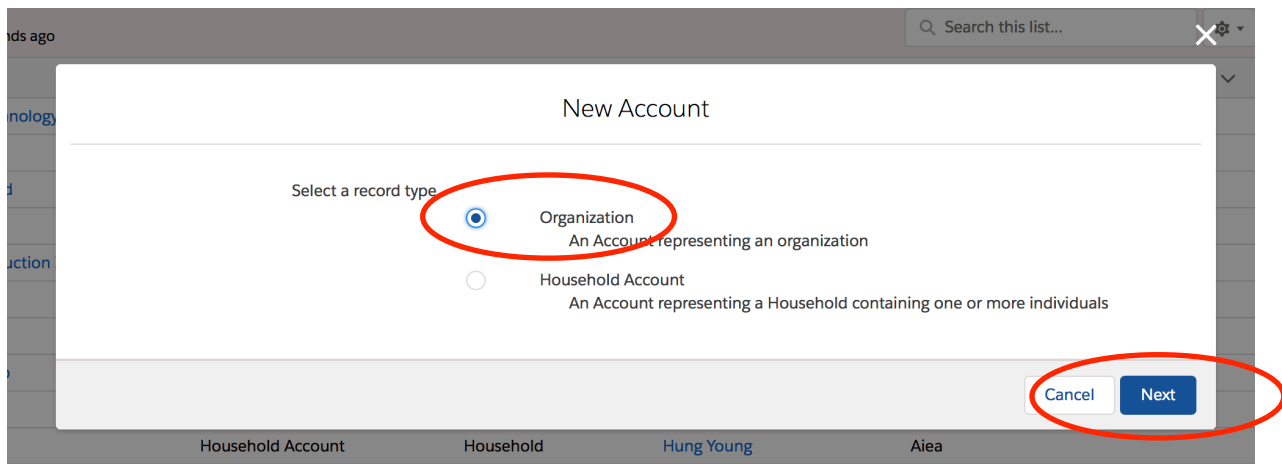
3. Fill out the form. Enter as much as you wish, but only the Account Name is required to create a record. Don't forget to Save your entries.

4. Once you have an account record, select Opportunities and click on New.

5. Select the record type. For our purposes, a corporate sponsorship is classified as a Donation.

6. Fill out the form. Each opportunity requires an Opportunity Name and associated Account. Other information will identify more attributes about the opportunity and allow management to create and track a pipeline. Reports can now be created to manage a sponsor opportunity pipeline and calculate expected value(s).

Sending a List Email from Salesforce

List emails can be used to alert members that their memberships are about to expire or to communicate with small groups such as the board of directors or specific committee members. The email sender will be the Salesforce account holder. List Email is limited to 200 recipients.

1. Create a list view. This list can be the result of a filter setting or a report. Select the checkboxes next to the names of the people you want to send the email to.
2. Click Send List Email.
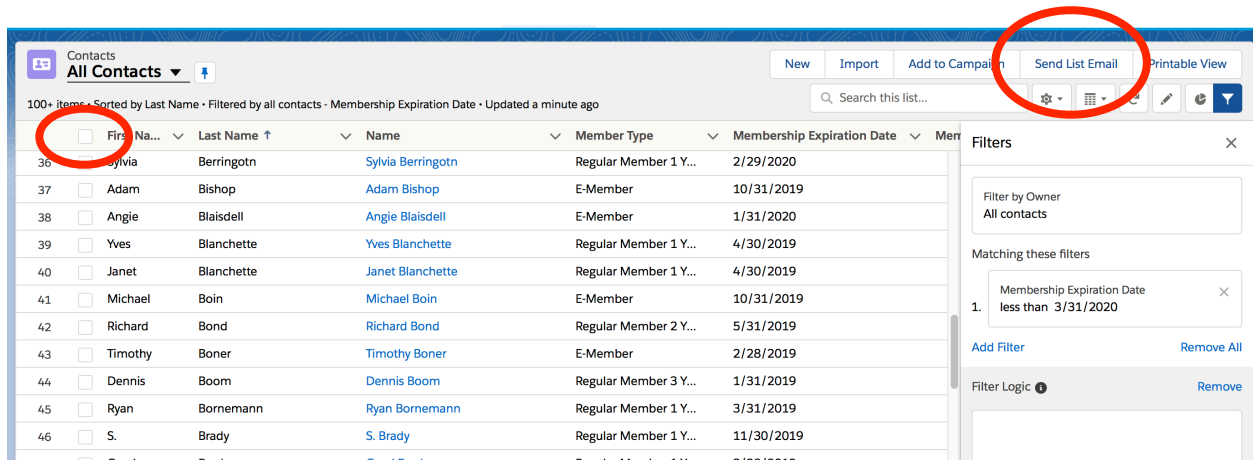
3. Create the email or choose from a template and modify it as desired. Merge fields may be used to personalize the email or add the individual's membership expiration date. See the sample below.
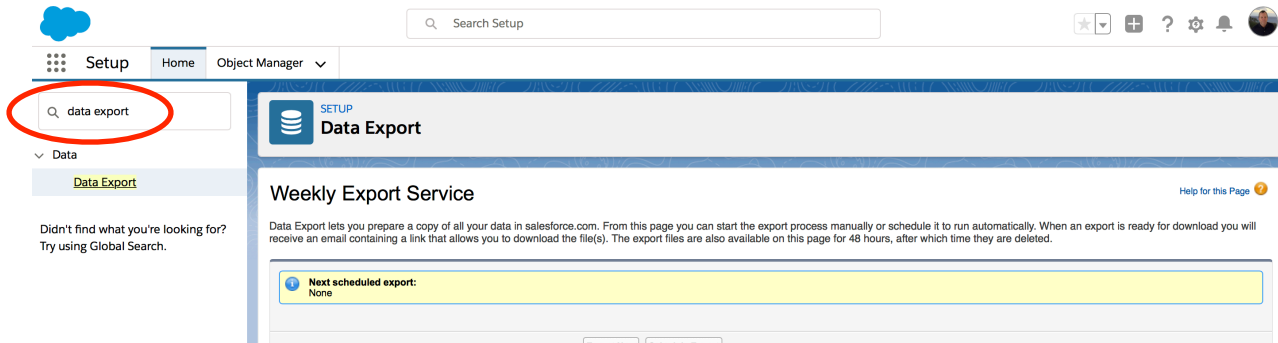
Salesforce Backups

Salesforce provides the capability to download complete database backups on demand or as an automated scheduled event that will periodically send a complete backup file to the account owner's email. Here's how it is done.

1. From Setup, enter Data Export in the Quick Find box, then select Data Export and Export Now or Schedule Export.

2. The Export Now option prepares your files for export immediately. This option is only available if enough time has passed since your last export.

3. The Schedule Export option allows you to schedule the export process for weekly or monthly intervals.
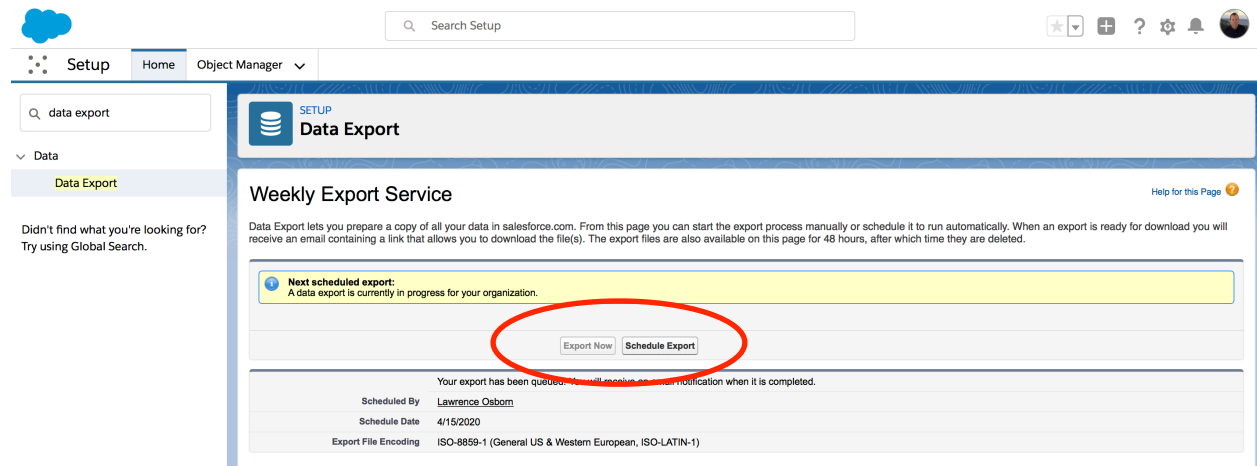
4. Select the desired encoding for your export file. For our use just leave the default settings.

5. Select Include images, documents, and attachments and Include Salesforce Files and Salesforce CRM Content document versions to include these items in your export data. You can also select the periodicity of the backups.