Salesforce for Nonprofits Base Camp: Begin with Contacts and Accounts

Hands-On Workshop Guide

Agenda
Generate Your Workshop Org
Log In to Your Workshop Org
What if My Screen Doesn't Look Like That?
Before We Begin
Create a Contact and Household
Create an Affiliation
Create a Second Contact in the Household
Create a Relationship
Track Activities for a Contact
Manage Contacts in a List View

Agenda

Each Basecamp session includes a hands-on exercise. Today's focus is on contact and account management.

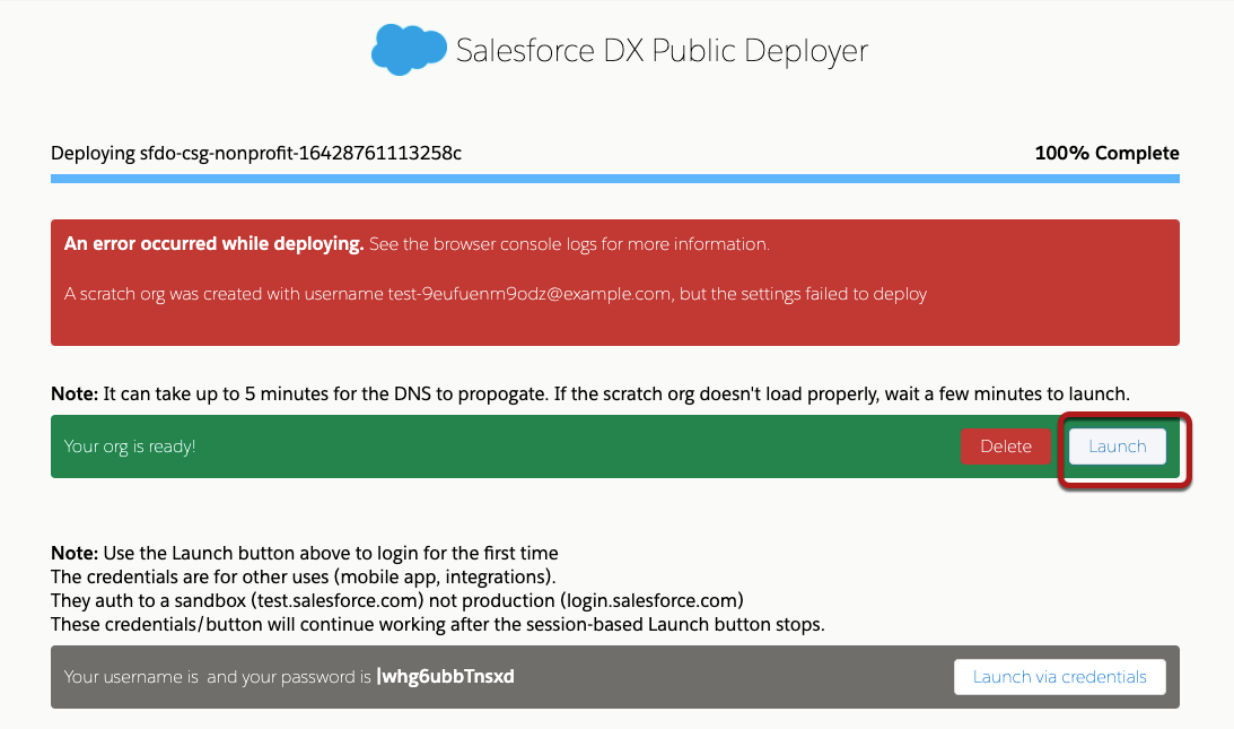
Together we will:

- Create a contact record and a household account.
- Examine primary affiliation, which is how we track a contact's employer.
- Add a second contact to the new household and manage the formal and informal greetings for the household.
- Specify how the new contacts are connected with a relationship.
- Record notes about a meeting, send an email, and create a follow up task.
- Create a List View to view our contacts in Colorado

Generate Your Workshop Org

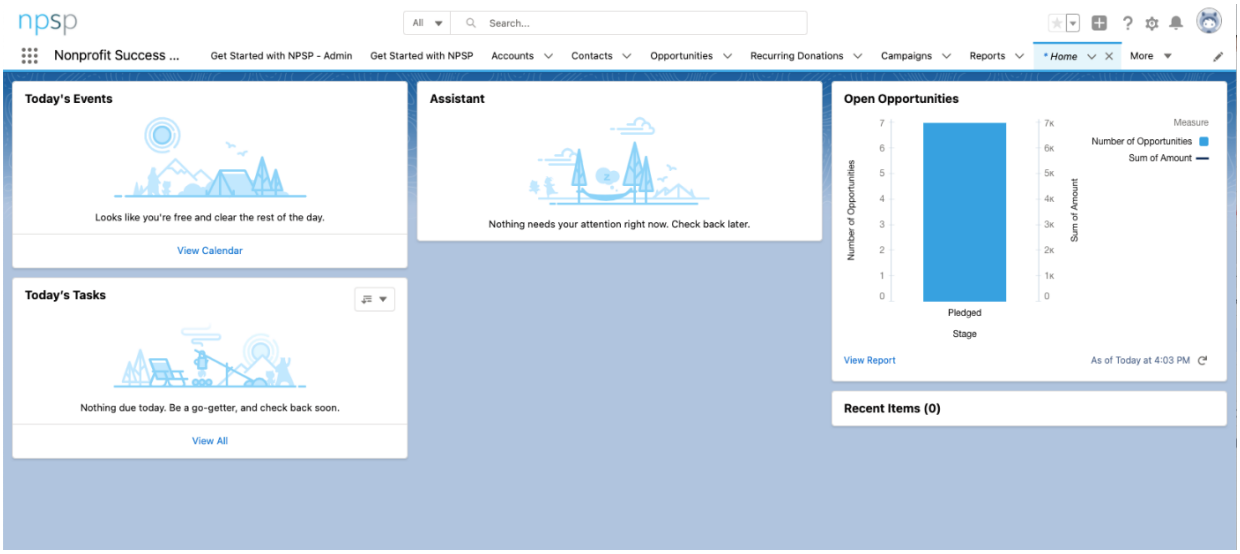
The first thing you need to do is spin up a practice environment.

1. Navigate to https://sforce.co/BaseCampWorkshop
2. Wait for the deployer to run. It will take about 10 minutes to generate your org.
3. When the org is ready, click **Launch.** You can safely ignore the error message.



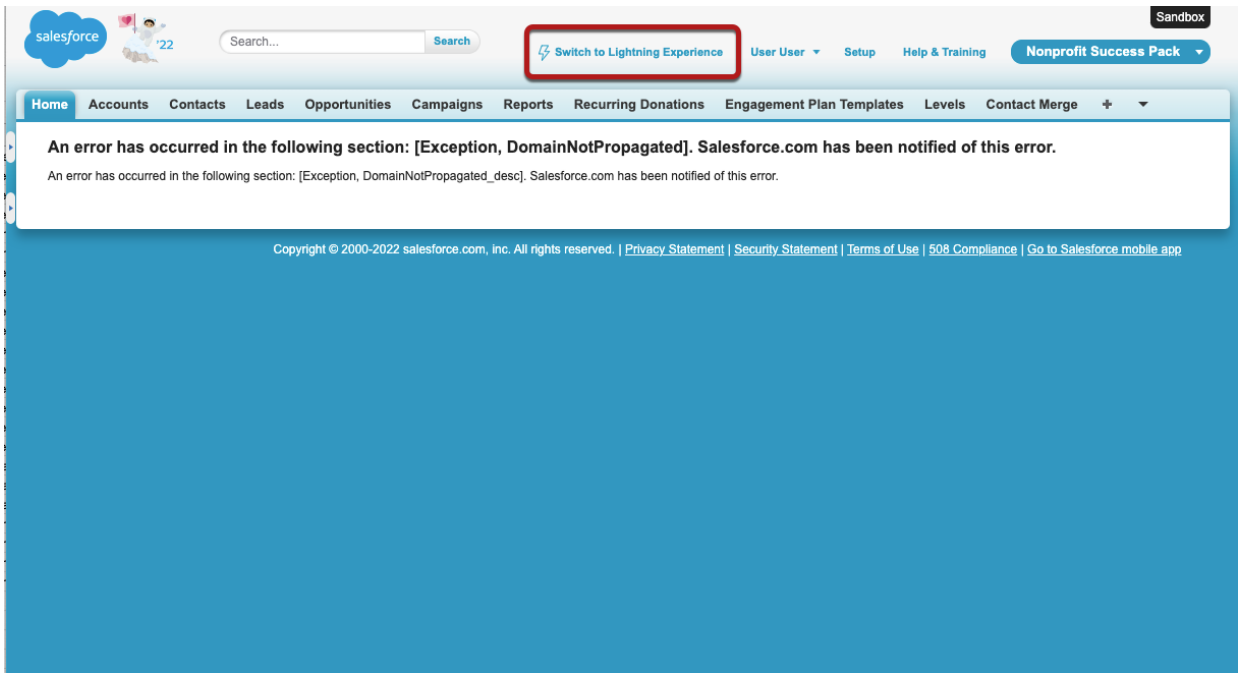
Log In to Your Workshop Org

When you launch your workshop, you will begin on a homepage that includes Today's Events and Today's Tasks. Since this is a brand new org, you won't see any tasks assigned to you.



What if My Screen Doesn't Look Like That?

If you receive an error upon logging in—such as in the screenshot below—click **Switch to Lightning Experience** at the top of the page.



Before We Begin

In today's workshop we'll walk through step-by-step instructions to create constituent records in Salesforce. For these examples, we use NPSP out-of-the-box without any customizations. We've included *Think Like an Admin Tips* to point out where you might want to customize Salesforce for your own nonprofit. We provide you with how-to resources at the end of this guide for those who want to learn more.

Let's get started!

Create a Contact and Household

We just met James Navarro at an event and he's interested in working with COACH as a volunteer. Let's create a contact record for him in Salesforce to keep track of our relationship.

But before we do that, let's make sure he doesn't already exist in our database. We don't want to create duplicate records!

1. Type `James Navarro` in the Global Search bar.
2. As you begin typing, you'll see another James appear—but not James Navarro. We'll need to create a new contact record.
3. Click the **Contacts** tab.
4. We begin on the Recently Viewed list view, which will be empty because this is a brand-new organization. We'll see results on this list view as we start working with records in Salesforce.

5. Click **New** and fill in the following fields:
    a. Salutation: **Mr.**
    b. First Name: `James`
    c. Last Name: `Navarro`
    d. Account Name: Leave this blank. NPSP will automatically create a new household account record for James when we save this new contact.
    e. Primary Affiliation: Find and select **Grafton Grub Spot** by starting to type it in the field. This field is how we track contacts' employers and other relationships with organizations in NPSP.
    f. Title: `Manager`
    g. Gender: **Male**
    h. Preferred Email: **Personal** (the default.) NPSP allows us to set a preferred Email, Preferred Phone and a Preferred Address as default for a contact.
    i. Personal Email: Fill in your own personal or work email. Makes sure you have access to the address you enter here, because later we'll send a test email to the address you enter.
    j. Primary Address Type: **Home**
    k. Mailing Address: Search `2145 Owl Wing Pl` (Google maps integration should appear after you set the Primary Address Type to Home)
    l. Mailing Street: `2145 Owl Wing Pl`
    m. Mailing City: `Southaven`
    n. Mailing State/Province: `MS`
    o. Mailing Zip/Postal Code: `38671`
6. Scroll past all the Donation Information, Donation Totals, Soft Credit Total, Membership Information, and System Information section fields to check them out, then click **Save.**

We're now on our new contact record for James Navarro!

Think Like an Admin Tip: This is all configurable. It's easy to add any additional fields you need. And if there are fields here that you don't need, those can be removed from the Page Layout in the Object Manager!

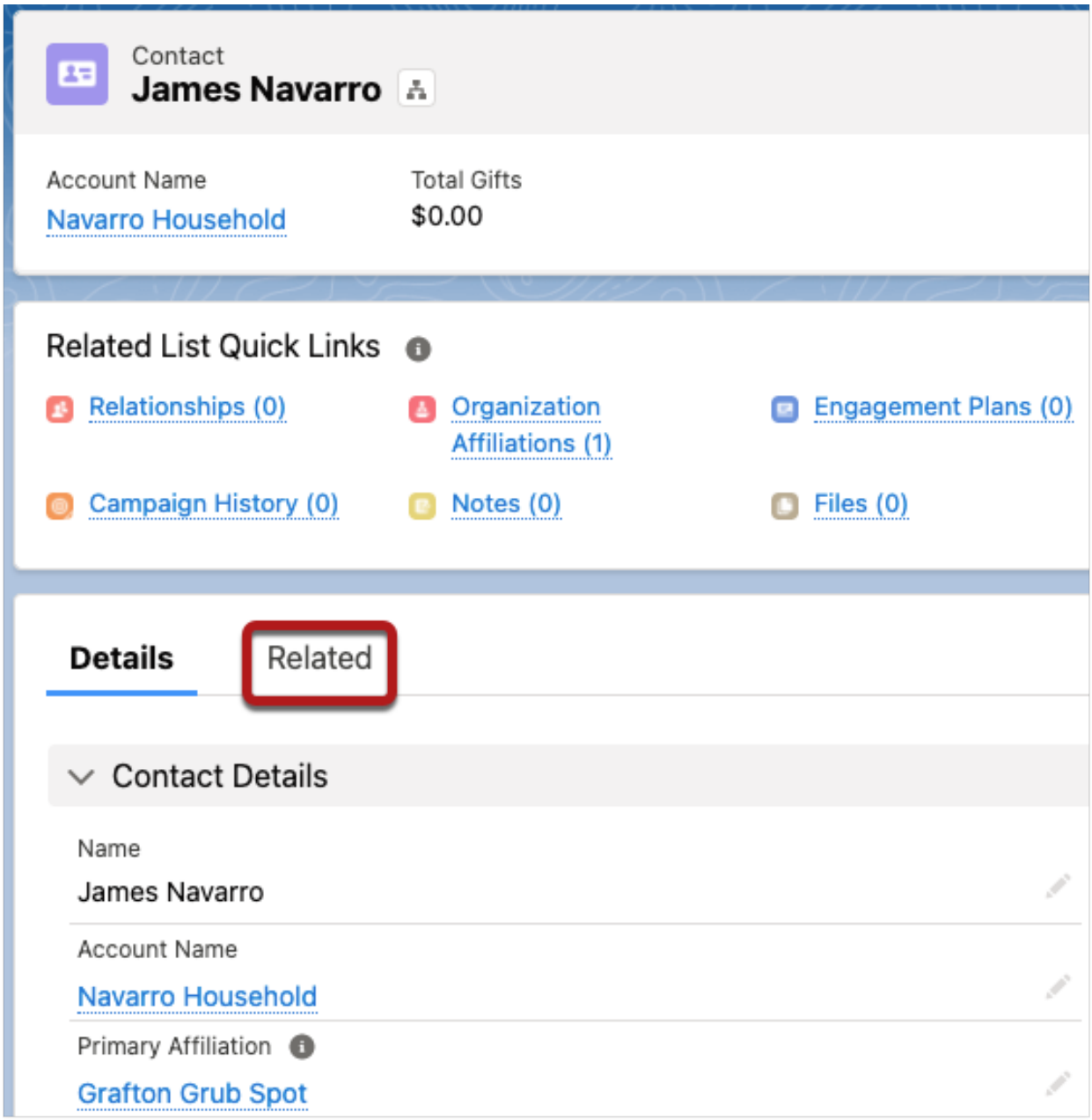
Create an Affiliation

When we filled in the Primary Affiliation field on James' contact record, NPSP automatically created an affiliation record, too.

Let's stop to explore affiliations. An affiliation is any connection between a contact and an organization. You can use affiliations to track connections between a contact and multiple organizations, such as a contact's current employer, their former employer, a nonprofit where they're a board member, and any other with which they're connected.

There are a few ways to do this, but here's one:

1. Click on the **Related** tab on the contact record page. It's right next to Details. The **Related** tab shows us records that are related to this Contact record.



2. Scroll to the Organization Affiliations related list and see that Grafton Grub Spot is already there.
3. Click **New** in the related list to add a new affiliation to Pineville Pantry, where James just got a new job.
4. In the Organization field, find and select **Pineville Pantry**. You'll notice that sometimes in Salesforce this field is labeled *Organization* and other times it's labeled *Account*. That's because some nonprofits rename the account name to Organization to better reflect the way they work.
5. In Role, enter `Assistant Vice President`.
6. Click **Primary** to indicate this is where James works now—checking this box will automatically uncheck Primary on his previous primary affiliation at Grafton Grub Spot.
7. In Start date, fill in today's date.
8. Click **Save**.

James now has two affiliations in the Organization Affiliations related list: Pineville Pantry is listed as Current, and Grafton Grub Spot has automatically been marked as Former. We could also create additional Affiliations to track other organizations such as the school where James volunteers as a coach.

Click the **Details** tab of James's contact record, and notice that Pineville Pantry is now listed as James's primary affiliation.

Create a Second Contact in the Household

Now let's add James's wife, Alyssa, to his household.

1. Click **Navarro Household** under Account Name on James's contact record.
2. Click **Manage Household** on the household account record.
3. Enter `Alyssa Navarro` in the Find a Contact box.
4. We don't find anyone with that name, so click **+ New Contact** and enter these details:
    a. Salutation: **Ms.**
    a. First Name: `Alyssa`
    b. Last Name: `Navarro`
5. Click **New Contact**.

Notice on the Manage Household page that the Formal Greeting (what you'd write on an envelope) and Informal Greeting (what you'd write after *Dear* in a letter or email) populate automatically. You can override these values by deselecting the **Auto Formal Greeting** or **Auto Informal Greeting** boxes.

Think Like an Admin Tip: You can set default Formal Greeting and Informal Greeting formats in NPSP Settings if you want to use a different greeting convention.

The Primary Contact is always the first contact created in the household, but you can change that by reordering the household member cards on this Manage Household page. The Primary Contact will always be the contact furthest to the left. Drag and drop them to reorder.

For now, though, we'll click **Save**.

If we look at the Navarro Household now we'll see our new Formal Greeting and Informal Greeting under the Details tab, as well as both contacts in the Contacts related list under the Related tab.

Create a Relationship

Now let's create a relationship to show the connection between James and Alyssa. Relationships capture any connection between two people—whether familial, personal, or professional.

1. Click the Related tab on the household account record and find the Contacts related list.
2. Click **James Navarro** to navigate to his contact record. (You could also click his name under Primary Contact on the Details tab.)
2. Click **New Relationship**. It may be in the quick actions menu. Click the down arrow to see all of the options.
3. In Related Contact, find and select **Alyssa Navarro**.
4. In Type, select **Wife**. Keep in mind:

a. The Type field describes how the related contact is related to *this* contact. Alyssa is James's wife, so we select Wife.
b. Creating a relationship will display the reciprocal relationship on Alyssa's record, so it will show that James is her husband or spouse.

   Think Like an Admin Tip: We can add custom reciprocal relationships such as mentor-mentee or teacher-student if that applies to your programs.

5. Click **Save**.

Click the **Related** tab on James's contact record. Find the Relationships related list to check out the new relationship. The related list should be at the top of the Related tab.

Click Alyssa's name to see the relationship from her side. On her contact record, click **Related** and find the Relationships related list. We can see that James is listed as her husband or spouse—depending on whether you filled in the gender field on his contact record—thanks to the reciprocal relationship settings.

We can use relationships to track any kind of person-to-person connection in Salesforce. For example, we could create a relationship between James and COACH Board Member Cindy Chen, his friend who invited him to the event.

Track Activities for a Contact

After our event, we want to record our conversation with James, email him some information about our coaching skills classes, and create a reminder task to follow up in a few weeks. We can do all three of these things on the Activity panel on James' contact record.

1. Return to James Navarro's contact record by clicking on the Global Search bar at the top of your page. This will show the five most-recent records we've worked with
2. Click on **James Navarro'**s contact record.
3. If you don't see his record, type the first few letters of `James Navarro` until his name appears.

Now notice the Activity panel. Here, we can create new tasks, log calls, and send email, as well as view upcoming and past interactions in the activity timeline.

The first thing we'll do is create a record of our Board Member Cindy Chen's introduction with James.

1. On the Activity panel, click **Log a Call**. We're using the term *Call* here loosely—it's just a brief record of an in-person, telephone, or online meeting.
2. In Subject, type `Cindy Chen Intro`.
3. In Comments, type `Board Member Cindy Chen introduced me to her friend James who is interested in enrolling in our coaching skills clinic and volunteering as a coach.`
4. Note that you could attach this call record to other records such as a related opportunity or account. We'll skip that for now.
5. Click **Save**.

Next we'll email James the information he requested about the upcoming Coaching Skill class schedule.

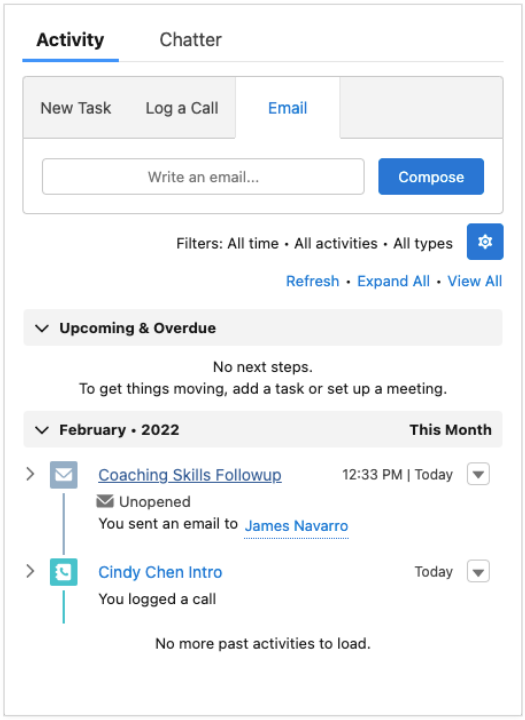
1. On the Activity panel, click **Email**.
2. In Subject, type `Coaching Skills Followup`
3. For the body type a brief note, such as:

> `Following up with some information about our Coaching Skills Clinic. You can find details at our website.`
>
> We're keeping this email short in the interest of time, but we could add rich-text formatting, hyperlinks, attachments, and more.
>
> *Think Like An Admin Tip*: We can create templates of commonly used emails—complete with merge fields and attachments—that you can use over and over.

4. Notice that we could relate this email to other records, such as an opportunity or account. We'll skip that for now.
5. Click **Send**.

Because you filled in your personal email in James's email field, you should see a copy of this email in your inbox!

Notice that we can now see the email and the call we logged in the Activity Timeline.



The last thing we'll do is create a task to remind ourselves to follow up with James in two weeks.

1. On the Activity panel, click **New Task**.
2. In Subject, type `Followup re: Coaching Skills`
3. For Due Date, enter two weeks from today's date.
4. By default, this task will be assigned to you, but you can change this to another user if needed. We'll leave it assigned to ourselves for now.
5. Leave the Status as **Not Started.**
6. Click **Save.**

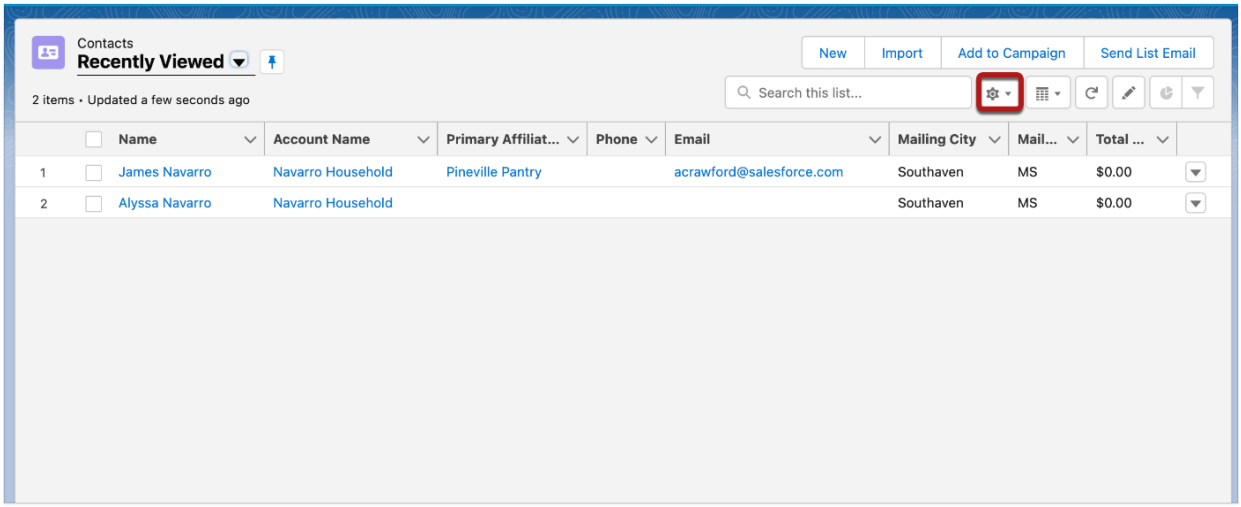
Your upcoming task now appears in the Upcoming & Overdue section of the Activity panel. We can easily check this task as completed or adjust any details from here.

Manage Contacts in a List View

Every object in Salesforce has a list view to help you find and manage records. For example, if you click on the Contacts tab in navigation, you'll see James Navarro and Alyssa Navarro in the Recently Viewed list view. If you click on the down arrow next to Recently Viewed, you can see other views, as well. We can create custom list views if we want to work with a set of filtered records. Let's try that now.

Let's say we're doing an event and want to contact contacts who live in Colorado so that we can update their addresses, if needed.

1. Click the **Contacts** tab, then click the **List View Controls** button (it's the gear icon).



2. Click **New**.
3. In List Name, enter `Colorado Contacts`
4. Hit the tab key on your keyboard, and the List API Name should populate automatically with Colorado_Contacts.
5. You can make this list view available to all users in your nonprofit, a group of users, or just yourself. We'll stick with the default, **Only I can see this list view**.
6. Click **Save**.

We created our new list view but haven't added the appropriate filters yet. Let's do that now.

1. In the Filters panel, click the **Filter by Owner** box.
2. Select **All Contacts**.

   Think Like an Admin Tip: We could limit our list view to just the members of particular efforts or appeals by searching for the Campaign Name in Filter by Campaign Name.

3. Click **Done**.

Now we'll add our filter for Colorado.

1. Click **Add Filter**.
2. In Field, find and select **Mailing State/Province**

3. In Operator, leave **equals** selected.
4. In Value, enter `CO`.
5. Click **Done**.
6. Click **Save**.

Next, let's update the columns in our List View to make it more useful.

1. Click the **List View Controls** button (it's the gear icon).
2. Click **Select Fields to Display.**
3. In the Available Fields column, find and select **Mailing Street** and click the right arrow to move it to the Selected Fields column
4. Repeat for the **Mailing City** and **Mailing Zip/Postal Code** columns
5. Click **Save.**

Now that we have our list view, we're ready to get to work!

First, we want to update the Mailing Zip/Postal Code for Arabelle Tennock.

1. Find Arabelle Tennock on the List View
2. Click into the **Mailing Zip/Postal Code** column (a pencil icon should appear)
3. Enter `80247` and return.
4. The box should now appear yellow which means that the entry has not yet been saved. To confirm, click **Save.**

Update Multiple Records From a List View (Optional)
To save time, we can also update a number of records at once. You can conveniently edit fields on records directly from a list view. Not all fields on records can be edited inline. To find out whether a field supports inline editing, hover over it, and look for the edit pencil icon. Non-editable cells have a lock icon.

Let's say for our Colorado Contacts, we want to update two persons from our list who are medical professionals with the Title abbreviation 'Dr.“

1. From the Colorado Contact List View, find Arabelle Tennock and Anna Black.
2. Select the Checkbox from the left of the records Arabelle Tennock and Anna Black.
3. Hover over the **Title** cell to edit, and then click the **edit pencil icon**. Or, double-click the cell.
4. Enter **Dr.** in the editable cells.
5. Select the Checkbox to **Update 2 selected items**.
6. Click **Apply.**
7. Review the changes and click **Save** to update Multiple Records.

We now have a list view of only contacts from Colorado. If this was the list view we wanted to use every time we came to the Contacts tab, we could pin the list view to be our default by clicking the **Pin this list view** button next to the list view's name.

Think Like an Admin Tip Resources

- Trailhead: Lightning Experience Customization
- Trailhead: Custom Fields Quick Look
- Trailhead: Contact and Account Settings in Nonprofit Success Pack

- Trailhead: Productivity in Nonprofit Success Pack
- NPSP Documentation: Manage Relationship Settings
- NPSP Documentation: Manage Households and Organizations