

Using a Salesforce Database to Build Membership and Donations



“You may not know what you are missing!”

Helen Tjader, Acorn Nonprofit Solutions



Using a Salesforce Database to Build Membership and Donations

Today's presentation includes two segments:

✧ **Part 1 - Selecting Salesforce for CRM**

✧ **Part 2 - A look at the Salesforce Nonprofit template**



Part 2 -Salesforce Nonprofit Template



Salesforce Nonprofit Template

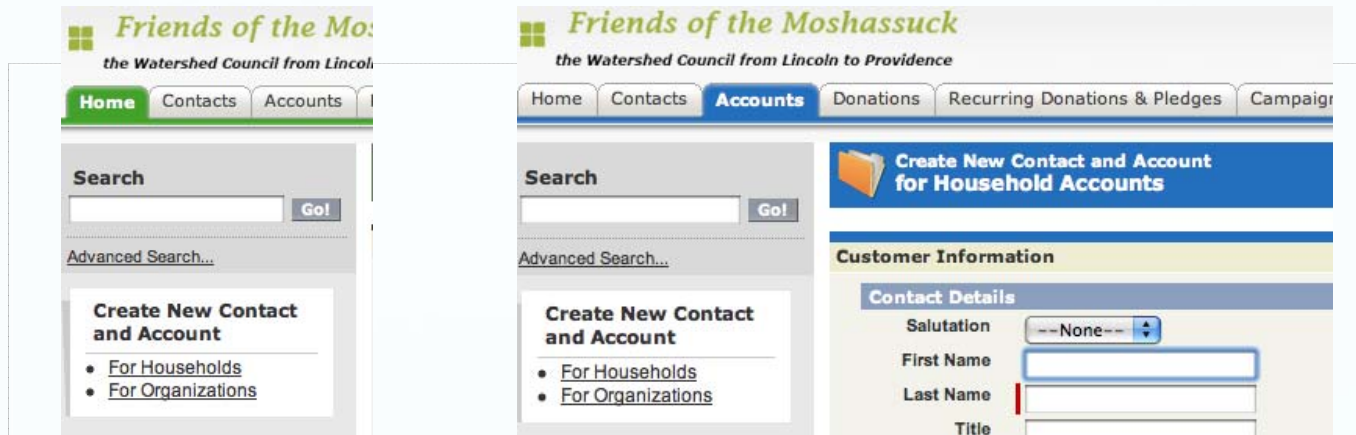
The screenshot shows the Salesforce Nonprofit Template interface for 'Friends of the Moshassuck'. The header includes the organization's name and logo, the tagline 'the Watershed Council from Lincoln to Providence', and navigation links for Setup, System Log, Help & Training, and Logout. Below the header is a navigation bar with tabs for Home, Contacts, Accounts, Donations, Recurring Donations & Pledges, Campaigns or Events, Reports, Dashboards, Documents, About Nonprofit Starter Packages, and Resources. The main content area displays a search bar with a 'Go!' button and an 'Advanced Search...' link. The user profile section shows 'Helen Tjader at Friends of Moshassuck' with the date 'Friday March 20, 2009'. The dashboard section includes a 'Dashboard' label and a 'Refresh' button.

✧ **Salesforce is a powerful program to help you track members, volunteers, donations and more. Better than any 'Roladex' or spreadsheet, with proper input, your Salesforce database can reveal information about your supporters that will help you grow by improving your communications within and without your organization.**

✧ **It is a practical tool for large and small organizations because corrections and updates are made available to all your Salesforce users even if you work from different locations. Each non-profit organization can register up to 10 users at no additional cost.**



Salesforce Nonprofit Template



- ✧ The Salesforce database is organized as a series of tabs which are opened for entering and editing data.
- ✧ Once opened, each tab has a distinctive color and look.
- ✧ Individuals are “Contacts”. These individuals might be members, prospective members, grantors or organization contacts.
- ✧ The best practice is to create a separate contact for each individual.
- ✧ Salesforce can accommodate your organization’s naming conventions.



Salesforce Nonprofit Template

Create New Contact and Account for Household Accounts

Customer Information Save Save & Add Donation Save & Add Membership Cancel

Contact Details

Salutation Prof. [v]
First Name Itsa
Last Name Test
Title
Birthdate [3/20/2009]
Household Type Multi-person Household [v]

Contact Information

Preferred Phone Mobile [v] Preferred Email Home [v]
Home Phone
Mobile Phone (401) 888-8888 Personal Email itsatest@cox.net
Work Phone
Alternate Email
Other Phone
Fax

Address Information

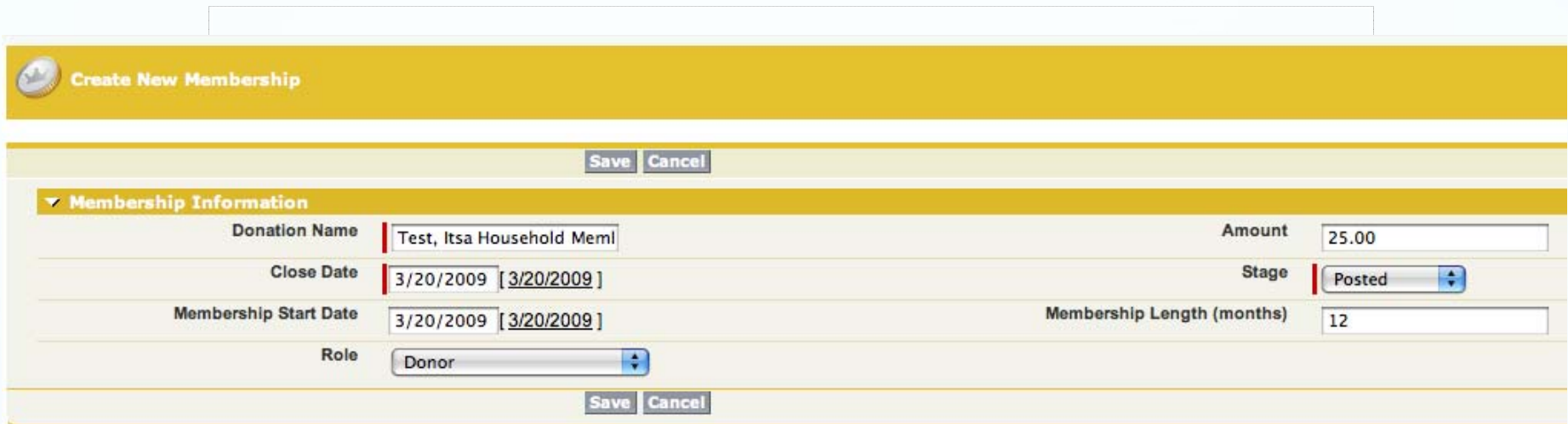
Primary Address Type ---None--- [v] Secondary Address Type ---None--- [v]
Primary Street 15 Test Drive Secondary Street
Primary City Your City Secondary City
Primary State/Province RI Secondary State/Province
Primary Zip/Postal Code 02999 Secondary Zip/Postal Code

Save Save & Add Donation Save & Add Membership Cancel

- ✧ In the RILWP version of Salesforce, the 'Create New Contact and Account' button allows you to enter the basic information for an individual on a single screen.
- ✧ Every 'Contact' has a record along with an automatically created 'Household'/'Organization' record.



Salesforce Nonprofit Template



Create New Membership

Save Cancel

Membership Information

Donation Name	Test, Itsa Household Mem	Amount	25.00
Close Date	3/20/2009 [3/20/2009]	Stage	Posted
Membership Start Date	3/20/2009 [3/20/2009]	Membership Length (months)	12
Role	Donor		

Save Cancel

- ✦ In this example, the button at the bottom of the contact screen was used to enter more information about a membership donation for this new contact on the screen shown above.



Salesforce Nonprofit Template

Donations | Recurring Donations & Pledges | Campaigns or Events | Reports | Dashboards | Documents | About Nonprofit Starter Packages | Resources

Donation
Test, Itsa Household Membership - 3/20/2009

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

« Back to List: Accounts

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

Donation Detail Edit Delete Clone Add Matching Donation

Donation Information

Donation Record Type	Membership [Change]	Stage	Posted
Donation Name	Test, Itsa Household Membership - 3/20/2009	Probability (%)	100%
Account Name	Test, Itsa Household	Primary Campaign Source	
Amount	\$25.00	Recurring Donation	
Close Date	3/20/2009		

Membership Details

Membership Status	Active	Membership Start Date	3/20/2009
Membership Length (months)	12	Membership End Date	3/19/2010
Created By	Helen Tjader, 3/20/2009 3:48 PM	Last Modified By	Helen Tjader, 3/20/2009 3:48 PM
Description			

Edit Delete Clone Add Matching Donation

Open Activities New Task New Event Open Activities Help

No records to display

Activity History Log A Call Mail Merge Send An Email Activity History Help

No records to display

Notes & Attachments New Note Attach File Notes & Attachments Help

No records to display

Contact Roles New Contact Roles Help

Action	Contact Name	Account Name	Email	Phone	Role	Primary
Edit Del	Itsa Test	Test, Itsa Household	itsatest@cox.net		Donor	<input checked="" type="checkbox"/>

Stage History Stage History Help

Stage	Amount	Probability (%)	Expected Revenue	Close Date	Last Modified
Posted	\$25.00	100%	\$25.00	3/20/2009	Helen Tjader, 3/20/2009 3:48 PM

✧ On the saved 'Donation' for membership, the amount, start and end dates are shown. Salesforce can be set to create a 'Task' for acknowledging the gift. A copy of the letter can be attached. Note Itsa is listed as the Primary Donor.



Salesforce Nonprofit Template

Contact
Prof. Itsa Test [Printable View](#) | [Customize Page](#)

[Back to List: Accounts](#)

[Donations \[1\]](#) | [Recurring Donations & Pledges \[0\]](#) | [Contact Property Association \[0\]](#) | [Conservation Easement Monitoring \[0\]](#) | [Contact Project Associations \[0\]](#) | [Contact History \[1\]](#) | [Open Activities \[0\]](#) | [Campaign or Event History \[0\]](#) | [HTML Email Status \[0\]](#) | [Relationships \[0\]](#) | [Organization Affiliations \[1\]](#) | [Notes & Attachments \[0\]](#)

Contact Detail [Edit](#) [Delete](#) [Clone](#) [Request Update](#)

Contact Details

Name	Prof. Itsa Test	Household Address	
Account Record Type	Household	Birthdate	
Account Name	Test, Itsa Household		
Title			
Description			

Contact Information

Preferred Phone	Mobile	Preferred Email	Home
Mobile Phone	(401) 888-8888	Personal Email	itsatest@cox.net
Work Phone		Work Email	
Other Phone		Alternate Email	
		Fax	

Address Information

Primary Address Type		Secondary Address Type	
Primary Address	15 Test Drive Your City, RI 02999	Secondary Address	

Volunteer Information

Volunteer Skill Set	
Group Affiliation	
Board Member Role	
Active Board Member	<input type="checkbox"/>
Mailing Category	
Volunteer Description	

ACCOUNT Donation Information

Last Transaction Date		Membership Status	Active
Last Donation Amount	\$0.00	Current Membership Start Date	3/20/2009
Lifetime Transaction Total		Current Membership End Date	3/19/2010
Summary # of Donations Made	1	Initial Membership Start Date	3/20/2009
Highest Donation Amount	\$25.00	Amount of Time Since Initial Membership	0 Months

System Information

Created By [Helen Tjader](#), 3/20/2009 3:48 PM Last Modified By [Helen Tjader](#), 3/20/2009 3:48 PM

✦ This 'Contact' record screen shot includes the upper portion of the screen for the newly created contact. The 'Contact Detail' can be adapted to your organization's needs. The RILWP version of Salesforce as shown here includes mainly standard and commonly used fields.



Salesforce Nonprofit Template

Donations [New Donation](#) [New Grant](#) [New Membership](#) [Donations Help](#) ?

Action	Donation Name	Stage	Amount	Close Date
<input type="checkbox"/> Edit Del	Test, Itsa Household Membership - 3/20/2009	Posted	\$25.00	3/20/2009

Recurring Donations & Pledges [New Recurring Donation/Pledge](#) [Recurring Donations & Pledges Help](#) ?

No records to display

Contact Property Association [New Contact Property Association](#) [Contact Property Association Help](#) ?

No records to display

Conservation Easement Monitoring [New Conservation Easement Monitoring](#) [Conservation Easement Monitoring Help](#) ?

No records to display

Contact Project Associations [New Contact Project Association](#) [Contact Project Associations Help](#) ?

No records to display

Contact History [Contact History Help](#) ?

Date	User	Action
3/20/2009 3:48 PM	Helen Tjader	Created.

Open Activities [New Task](#) [New Event](#) [Open Activities Help](#) ?

No records to display

Activity History [Log A Call](#) [Mail Merge](#) [Send An Email](#) [Request Update](#) [View HTML Email Status](#) [Activity History Help](#) ?

No records to display

Campaign or Event History [Add Campaign or Event](#) [Campaign or Event History Help](#) ?

No records to display

HTML Email Status [Send An Email](#) [HTML Email Status Help](#) ?

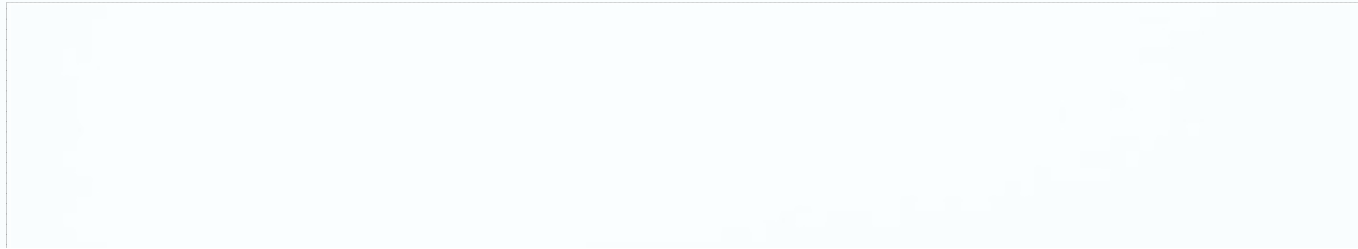
No records to display

Relationships [New Relationship](#) [Relationships Help](#) ?

✦ The bottom section of the same Contact record shows the additional available information fields that are standard with the RILWP version of Salesforce. Each functional section is separated by a matching colored bar and includes buttons connecting to additional records for this contact.



Salesforce Nonprofit Template



Donations		New Account Donation	Donations Help ?	
Action	Donation Name	Stage	Amount	Close Date
Edit Del	Test, Itsa Household Membership - 3/20/2009	Posted	\$25.00	3/20/2009

✧ Subsequent donations are entered by clicking the 'New Account Donation' button within the 'Donations' section of the Contact record.



Salesforce Nonprofit Template

Donations Recurring Donations & Pledges Campaigns or Events Reports Dashboard

New Donation
Select Donation Record Type

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

Select Donation Record Type

Record Type of new record

- ✓ Donation
- Grant
- Matching Donation
- Membership

Continue Cancel

Available Donation Record Types

Record Type Name	Description
Donation	Donation Received
Grant	Grant Received
Matching Donation	Matching Donation from an Donor's Employer or other Organization
Membership	Use this record type for memberships


✧ For subsequent donations, picklists and pop-up calendars and look-up screens ease data entry and improve accuracy.



Salesforce Nonprofit Template

[Donations](#) | [Recurring Donations & Pledges](#) | [Campaigns or Events](#) | [Reports](#) | [Dashboards](#) | [Documents](#) | [About Nonprofit Starter Packages](#) | [Resources](#)

Powered by [salesforce.com](#)

 **Donation**
Test, Itsa Household- Donation 3/20/2009
[Printable View](#) | [Customize Page](#)

[← Back to List: Accounts](#)

[Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Notes & Attachments \(0\)](#) | [Contact Roles \(0\)](#) | [Stage History \(1\)](#)

Donation Detail

[Edit](#) | [Delete](#) | [Clone](#) | [Add Matching Donation](#)

Donation Information

Donation Record Type	Donation [Change]	Stage	Posted
Donation Name	Test, Itsa Household- Donation 3/20/2009	Probability (%)	100%
Account Name	Test, Itsa Household	Primary Campaign Source	Recurring Donation
Amount	\$50.00		
Close Date	3/20/2009		
Description			
Created By	Helen Tjader , 3/20/2009 4:28 PM	Last Modified By	Helen Tjader , 3/20/2009 4:28 PM

[Edit](#) | [Delete](#) | [Clone](#) | [Add Matching Donation](#)

Open Activities [New Task](#) | [New Event](#)

No records to display

Activity History [Log A Call](#) | [Mail Merge](#) | [Send An Email](#)

No records to display

Notes & Attachments [New Note](#) | [Attach File](#)

No records to display

Contact Roles [New](#)

No records to display

Stage History


Stage	Amount	Probability (%)	Expected Revenue	Close Date	Last Modified
Posted	\$50.00	100%	\$50.00	3/20/2009	Helen Tjader , 3/20/2009 4:28 PM

- ✧ The donation record includes space for many related details.
- ✧ Donations can be linked to Campaigns or Events.




Salesforce Nonprofit Template

Donations Recurring Donations & Pledges **Campaigns or Events** Reports Dashboards Documents

 **Campaign or Event Edit**
New Campaign or Event

Campaign or Event Edit

Campaign Information

Campaign or Event Name	<input type="text" value="Test Membership 2009"/>
Campaign or Event Record Type	Campaign
Type	<input type="text" value="Direct Mail"/>
Status	<input type="text" value="Planned"/>
Start Date	<input type="text" value=""/> [3/20/2009]
End Date	<input type="text" value=""/> [3/20/2009]
Expected Revenue	<input type="text"/>
Budgeted Cost	<input type="text"/>
Actual Cost	<input type="text"/>
Expected Response (%)	<input type="text" value="0.00"/>
Num Sent	<input type="text" value="0"/>
Parent Campaign or Event	<input type="text"/> 

Description Information

Description	<input type="text"/>
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Salesforce Nonprofit Template

The screenshot displays the Salesforce Nonprofit Template interface. On the left, a dropdown menu for 'Campaign Type' is open, showing options: --None--, Referral Program, Advertisement, Banner Ads, Direct Mail (selected), Email, Telemarketing, and Other. The main form includes fields for Campaign Name, Record Type, Status, Start Date (3/20/2009), End Date (3/20/2009), Planned Revenue, Budgeted Cost, Actual Cost, Response (%), Num Sent, and Campaign or Event. A calendar for the month of March 2009 is visible, with the 20th highlighted. The 'Status' is set to 'Planned'.

- ✧ Campaign responses can be tallied as a report and sorted in a variety of ways to learn about the response to your mailings.
- ✧ All or part of your contacts can be added to a 'campaign' or 'event'.
- ✧ Exporting a report with the selected contacts and household addresses can be used with a mail merge program of your choice to print labels or letters for the campaign and later, acknowledgments for participants.
- ✧ If a response is associated with a campaign or event, the 'Campaign or event History' area is also updated in the Contact Detail Record.



Salesforce Nonprofit Template

of the Moshassuck
Council from Lincoln to Providence

Setup System Log Help & Training Logout force.com Membership Donation Management

Accounts Donations Recurring Donations & Pledges Campaigns or Events Reports Dashboards Documents About Nonprofit Starter Packages Resources

Account Test, Itsa Household Printable View Customize Page Edit Layout Help for this Page

Back to List: Accounts Contacts (1) Donations (1) Recurring Donations & Pledges (0) Open Activities (0) Activity History (0) Notes & Attachments (0)

Account Detail Edit Delete

Account Name	Test, Itsa Household View Hierarchy	Account Record Type	Household Change
Addressee		Phone	
Type	Multi-person Household	Fax	

Address Information

Primary Address	15 Test Drive Your City, RI 02999	Secondary Address	
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Summary of Donations Information

Last Donation Date	3/20/2009	Membership Status	Active
Last Donation Amount		Current Membership Start Date	3/20/2009
First Donation Date	3/20/2009	Current Membership End Date	3/19/2010
Lifetime Donation History (Amount)	\$25.00	Initial Membership Start Date	3/20/2009
Lifetime Donation History (Number)	1	Amount of Time Since Initial Membership	0 Months
Highest Donation Amount	\$25.00		

Description

Description

System Information

Created By	Helen Tjader, 3/20/2009 3:48 PM	Parent Account	
Last Modified By	Helen Tjader, 3/20/2009 3:48 PM		

Edit Delete

Contacts Merge Contacts New Contact Contacts Help

Action	Contact Name	Title	Email	Phone
<input type="checkbox"/> Edit Del	Itsa Test		itsatest@cox.net	

Donations New Account Donation Donations Help

Action	Donation Name	Stage	Amount	Close Date
<input type="checkbox"/> Edit Del	Test, Itsa Household Membership - 3/20/2009	Posted	\$25.00	3/20/2009

✧ Now looking back at Itsa's Household Record, you can see that the New Contact feature saved inputting time and improved accuracy by automatically creating the associated Household Account.

✧ In the new template, Household is a type of Organization or Account.



Salesforce Nonprofit Template

of the Moshassuck
Council from Lincoln to Providence

Setup System Log Help & Training Logout force.com Membership Donation Management

Accounts Donations Recurring Donations & Pledges Campaigns or Events Reports Dashboards Documents About Nonprofit Starter Packages Resources

Account
Test, Itsa Household

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

Back to List: Accounts

Contacts (1) | Donations (1) | Recurring Donations & Pledges (0) | Open Activities (0) | Activity History (0) | Notes & Attachments (0)

Account Detail Edit Delete

Account Name	Test, Itsa Household View Hierarchy	Account Record Type	Household Change
Addressee		Phone	
Type	Multi-person Household	Fax	

Address Information

Primary Address	15 Test Drive Your City, RI 02999	Secondary Address	
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Summary of Donations Information

Last Donation Date	3/20/2009	Membership Status	Active
Last Donation Amount		Current Membership Start Date	3/20/2009
First Donation Date	3/20/2009	Current Membership End Date	3/19/2010
Lifetime Donation History (Amount)	\$25.00	Initial Membership Start Date	3/20/2009
Lifetime Donation History (Number)	1	Amount of Time Since Initial Membership	0 Months
Highest Donation Amount	\$25.00		

Description

Description

System Information

Created By	Helen Tjader, 3/20/2009 3:48 PM	Parent Account	
Last Modified By	Helen Tjader, 3/20/2009 3:48 PM		

Edit Delete

Contacts Merge Contacts New Contact Contacts Help

Action	Contact Name	Title	Email	Phone
<input type="checkbox"/> Edit Delete	Itsa Test		itsatest@cox.net	

Donations New Account Donation Donations Help

Action	Donation Name	Stage	Amount	Close Date
<input type="checkbox"/> Edit Delete	Test, Itsa Household Membership - 3/20/2009	Posted	\$25.00	3/20/2009

- ✧ A second contact within a Household can be added using the 'New Contact' button within the Household detail.
- ✧ In the new nonprofit template all donations within a Household are shown in the detail summary.



Salesforce Nonprofit Template

The screenshot displays the Salesforce interface for the 'Land Trust Tracker' application. At the top, there is a navigation bar with the following tabs: Home, About Land Trust Tracker (selected), Contacts, Organizations, Properties, Stewardship Monitoring, Property Projects, Reports, Documents, Dashboards, and Contact Property Association. The main content area is titled 'Land Trust Tracker for AppExchange by Idealist Consulting' and contains an 'About Land Trust Tracker' section. This section describes the application's purpose: to help land conservation organizations store and access project and stewardship data for protected properties. It also mentions that the application is free and can be utilized by any organization currently using Salesforce.com. A sidebar on the left includes 'Custom Links' (Individuals Account), a search bar, and 'Messages and Alerts' (REMINDER! Always enter a new contact using the 'NEW CONTACT' TAB). A right sidebar provides information about Idealist Consulting, including their mission and contact details.

- ✧ We have touched on just a few of the 'Membership Donation' features available through Salesforce. Other standard nonprofit features can track volunteer relationships for your contacts.
- ✧ Another key area available within RILWP's Salesforce version is known as the "Land Trust Tracker" App. developed with us by Idealist Consulting.
 - ✧ The tabs in this application include additional data areas related to properties, property monitoring and projects.
 - ✧ This information is integrated with the Membership Donation information allowing you to track contacts with relationships to your properties: neighbors, donors, stewards, volunteers...



Salesforce Nonprofit Template Quick Benefits Summary

- ✧ **Salesforce is extremely flexible and can be adjusted to meet your needs.**
- ✧ **Because information is stored by Salesforce, data backup is at a reduced risk for loss. Additional backups can be made locally.**
- ✧ **Salesforce can be accessed by authorized individuals from different locations, so organizations without a business office or with several offices, can easily have users simultaneously access updated information for their organization.**
- ✧ **Data input and editing are simple; but you must still do the work of thinking about what information will be useful and how it will be used.**
- ✧ **Users can hold different designated levels of access and responsibility.**



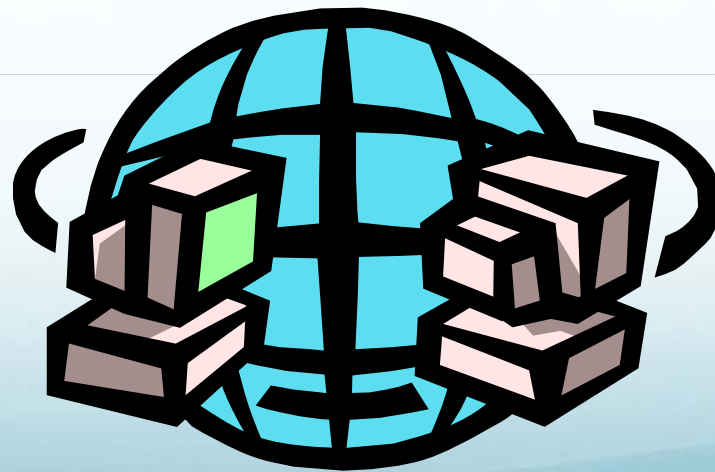
Salesforce Nonprofit Template Quick Benefits Summary

- ✧ Additional features can link emails and your responses with individual contacts.
- ✧ Salesforce also includes features to track workflow and maintain both a calendar and a customized home page.
- ✧ 'Views' are easily created and can be used to edit and improve your data.
- ✧ 'Reports' can be used to sift through your data to determine the success of your efforts whether through a campaign or event. Reports can produce lists to be exported to Excel for mailmerge and other purposes.
- ✧ Salesforce can store useful information which allows you to make new, more meaningful connections with your supporters.



Salesforce Nonprofit Template Quick Benefits Summary

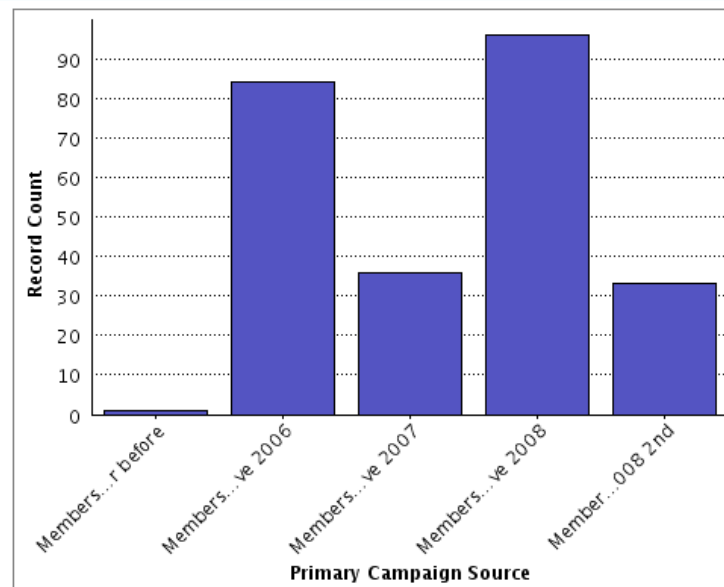
- ✧ Online training provides great value and convenience.
- ✧ The App exchange provides free and low cost resources for additional features you may use as you become more sophisticated in your communications including mass emails and website connections.
- ✧ Visit [Salesforce.com](https://www.salesforce.com) to receive a free 30 day trial of the software to explore the cloud!



Salesforce Nonprofit Template

What results have partners seen?

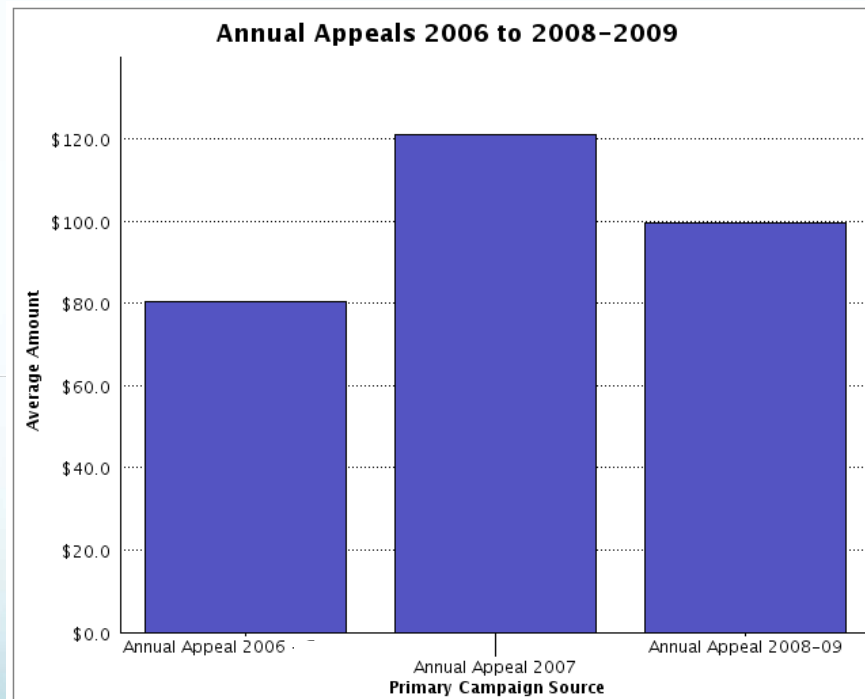
- ✧ Partner reports can compare the results of membership appeals across years. This report revealed some 2007 data was missing, but that the new practice of sending out a follow-up mailing for membership in 2008 was very worthwhile.



Salesforce Nonprofit Template

What results have partners seen?

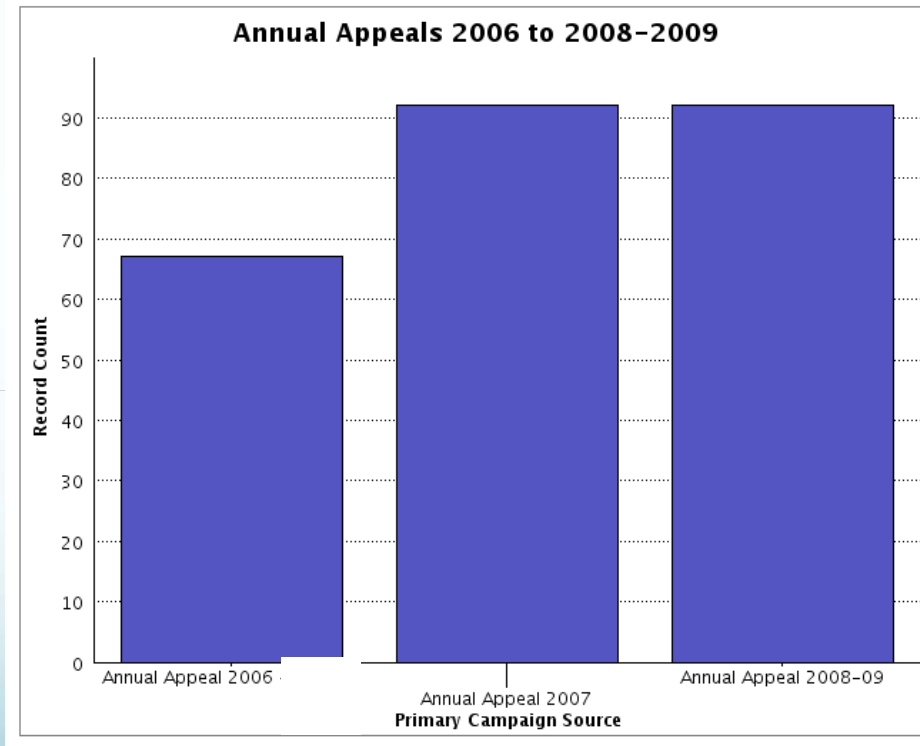
- ✧ Reports can compare the average size of gifts to the annual appeal across the years. Other reports reveal the scale of this new income stream.



Salesforce Nonprofit Template

What results have partners seen?

- ✧ By comparing reports, the partner could see that although giving the past year was slightly lower, participation remained strong – a very good sign!



Salesforce Nonprofit Template

Thank you for attending!
-Time for questions-

Also, feel free to contact me-
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