

YFC FORCE

Salesforce 101

Training

Agenda



Join Meeting:

Please join the meeting, by clicking on this link: <http://fosteringllc.com/meeting>

GOAL

To increase the Data Processor comfort level to 70% for basic data entry and receipting...to move away from old "legacy" system.

1) HOUSEKEEPING:

- a) Review [Project Management Sheet](#)
- b) Have you signed off on your data
- c) Click N Pledge (Yes or No) Have they contacted you?
- d) Who has logged in? Who has watched videos?
- e) Assign Chapter level CRM Admin (someone who can commit to/has ability to learn more, be point person for local questions and submit support requests)
- f) Resources: https://salesforce.yfc.net/training_page / "YFC Training" Tab

2) Intro - Get individual "take aways" from training

3) We will login to your chapters salesforce account www.login.salesforce.com

4) Review Users, Roles and Profiles

5) Explain tabs / objects - C&P / Batch Data Entry / Individuals / Accounts / Donations / Staff / Reports / Campaigns

6) Search

7) Explain related lists Individual's - Household Accounts - Organization Accounts - Staff

8) How to enter a donation Type - fields

9) Paper receipting workflow Check - Enter - Report - Export - Update - Done

10) Electronic receipting workflow Enter - Done

11) Reports overview - Start in the right place to

12) Review feedback, requested changes, support model, and schedule additional training

Youth for Christ FEEDBACK from Training

REQUESTED CHANGES:

SUGGESTIONS FOR THE FUTURE:

WOULD YOU LIKE TO SCHEDULE ADDITIONAL ONE-ON-ONE TRAINING?

If so, please list 3 (1-hour) available times within the next 2 weeks:

FEEDBACK FOR FOSTERING LLC: