Fostering, LLC | fosteringllc.com | 320.309.8405 | St. Cloud, MN



Youth for Christ Salesforce Overview and Data Mapping <u>Screen Shots to answer the questions...</u>

What does Salesforce BaseBox look like &

Where is my legacy data going to show up in Salesforce?*

*REMEMBER - Your Salesforce data will be only as good as you provide it.

Contents

P2. YFC Salesforce Home Page

P3. Organization Accounts and Related List

P4. Individual Accounts and Related Lists

P5. Household Accounts

P6. Relationships

P7. Donations

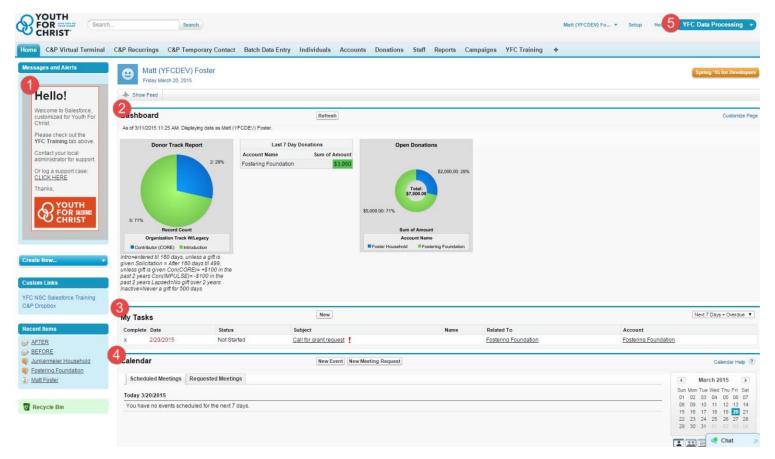
P8. Staff





Home Page

Where it all starts...



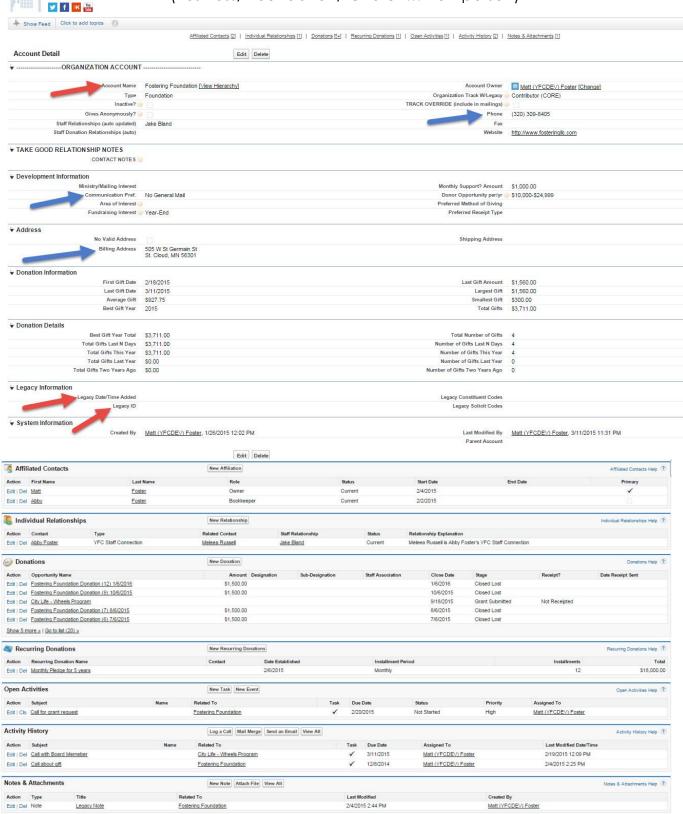
<u>Description of Home page:</u>

- 1) Hello! Welcome message = where to go for YFC Salesforce help and training.
- 2) Dashboard: a grouping of 3 charts of any data in Salesforce
- 3) Your tasks, manage your day here
- 4) Calendar: create events and schedule meetings
- 5) The Blue App 4 YFC Apps created to simplify your Salesforce experience

Organization Accounts and Related List

Fostering Foundation (Business/ Foundation/ Church... non-person)

Customize Page | Edit Layout | Printable View

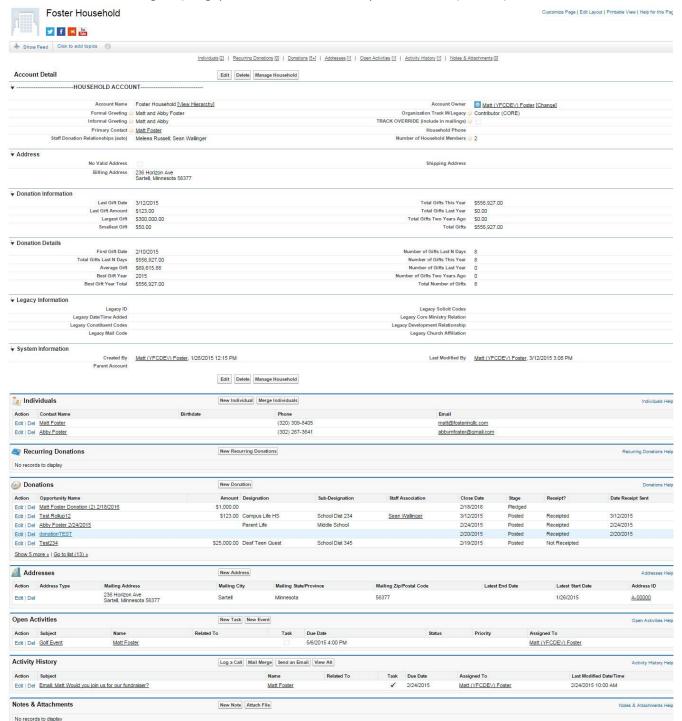


Individual Accounts and Related Lists Matt Foster Customize Page | Edit Layout | Printable View | Help for (People/Donors/Contact) 📝 📠 in 💟 f 🔣 🛗 Donations (3-1 | Resuming_Donations (1) | Relationships (2) | Quantization Affiliations (1) | Activity History (1) | Quantization Affiliations (1) | Activity History (1) | Quantization Affiliations (1) | QSP_Transactions (1) | QSP_Transactions (2) | QSP_Transactions (3) | QS Individual Detail Edit Delete Relationships Viewer Virtual Terminal **▼** Contact Details Matt Foster Foster Household Gender Staff Relationships (auto updated) Meleea Russell Staff Donation Relationships (auto) // Meleea Russell; Sean Wallinger **▼ TAKE GOOD RELATION SHIP NOTES** CONTACT NOTES 3 Met Matt at local community event. Said is very interested in Golf. ▼ Development Information nthly Support? Amount \$50.00 Meet with ED? // YES Communication Pref. Email Only Donor Opportunity per/yr 32,500-\$4,999 Area of Interest Basketball: Financial / Investing: Fitness Preferred Method of Giving **▼ YFC Involvement** Volunteer Area Campus Life ▼ Contact Information No Valid Address Address Override d Mailing Address 236 Horizon Ave Sartell, Minnesota 56377 Phone (320) 309-8405 Mailing Address 236 Horizon Ave Sartell, Minnesota 56377 Phone (320) 3 Preferred Phone Mobile Email matt@ matt@fosteringlic.com Mobile Home Phone (320) 309-8405 Personal Email @ matthfoster@gmail.com Work Email / matt@fosteringlic.com Work Phone Alternate Email **▶** Donation Information ▶ Donation Details ▼ Legacy Information ∮ Legacy Solicit Codes Legacy Development Relationship Legacy Core Ministry Relation Legacy Date Time Added Legacy Church Affiliation ▼ System Information Created By Matt (YFCDEV) Foster, 1/26/2015 12:15 PM Last Modified By Matt (YFCDEV) Foster, 3/12/2015 3:10 PM Edit Delete Relationships Viewer Virtual Terminal Donations Action Opportunity Name Sub-Designation Edit | Del Matt Foster Donation (2) 2/18/2016 2/18/2016 4/17/2015 \$1,000.00 Pledges YFC Donation YFC Stock Donation Edit | Del Stock Gift Edit | Del | Test Rollup12 Edit | Del | Abby Foster 2/24/2015 Campus Life HS School Dist 234 Sean Wallinge 3/12/2015 \$123.00 Posted 3/12/2015 YFC Donation Edit | Del | donationTEST 2/20/2015 2/20/2015 YFC Donation Show 5 more » | Go to list (16) » Recurring Donations New Recurring Donations Edit | Del BeTheStory pledge Relationships Action Related Contact YFC Staff Connection Meleea Russell is Matt Foster's YFC Staff Connection Edit | Del | Meleea Russell Meleea Russell Organization Affiliations Organization Affiliations Help ? Edit | Del Fostering Foundation 2/4/2015 AF-000000 Activity History Log a Call Mail Merge Send an Email Request Update View All Activity History Help ? Related To Matt (YFCDEV) Foster Open Activities New Task New Event New Meeting Request Open Activities Help ? Edit | Del Golf Event Matt (YFCDEV) Foster Campaign History Add to Campaign Edit | Del | View Golf Event - 2/5/2015 2/5/2015 Fundraiser Responded 3/11/2015 11:09 AM Notes & Attachments New Note Attach File No records to display C&P Transactions No records to display C&P Recurrings

Household Accounts

This may be completely new to you.

It is auto-generated by Salesforce when you create a new Individual record. Think of it as a grouping (Husband, Wife, Kids...) under one primary account.



Relationships

(Connecting People with People)

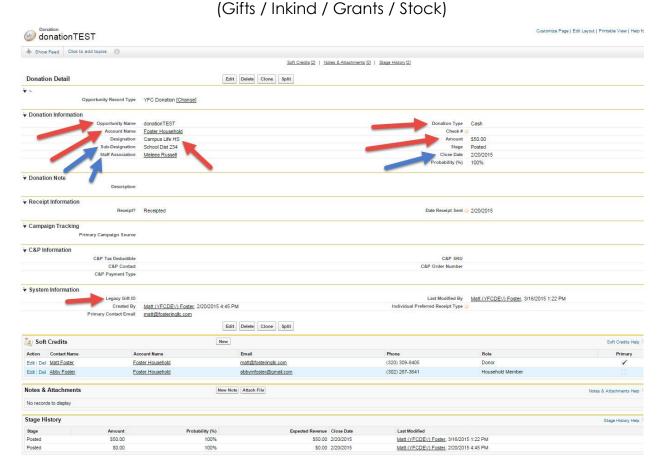


SPOUSE RELATIONSHIP NOTE: Because Salesforce uses a household account model, if the spouse name(s) are on the same record, they will be split, a new record will be created for the non-primary spouse and a spouse relationship will be created.



YFC STAFF CONNECTION NOTE: If you do not have your current data contacts relationship mapped, it will not magically map in Salesforce. The mapping must have a lookup value, not a text field.

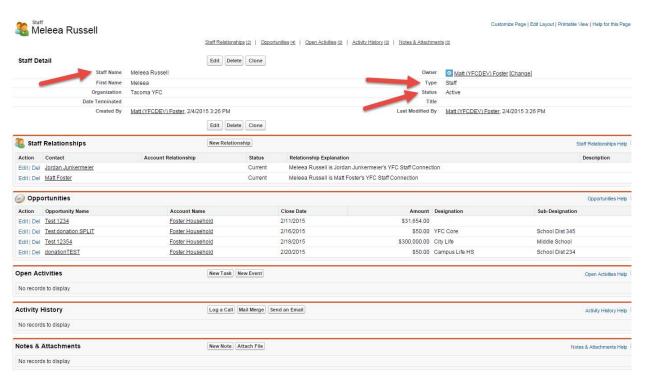
Donations



NOTE: The Donation (opportunity) name will be the donation description of your legacy donation data. The new YFC Designation/ Sub Designation will not apply unless you change these values before import. Please be sure to send a Legacy Donation ID.

Staff

(taken from YFC Local Configuration Worksheet)



NOTE: For staff no longer with your chapter/ not on staff. You must include them to relate historical donations to their Inactive staff record.