**YFC Salesforce Solutions**

**Chapter Configuration Worksheet**

Please answer these questions to get started with Salesforce.

1. Who are your primary contacts for these job responsibilities?

|  |  |  |  |
| --- | --- | --- | --- |
| *RESPONSIBILITY* | *NAME* | *TITLE* | *EMAIL* |
| Donation Processing |  |  |  |
| Development / Fundraising |  |  |  |
| Technology |  |  |  |
| Administrative/ Office Manager |  |  |  |

2) Name your current fundraisers (events/campaigns and what it funds)

|  |  |  |
| --- | --- | --- |
| NAME | ONGOING or SEASONAL | WHAT IT FUNDS |
| Example: Golf Tournament | Spring | General Budget |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

3) Name your current ministry programs (use unique local names if necessary)

|  |  |
| --- | --- |
| *YFC CORE MINISTRY* | *UNIQUE LOCAL NAME if necessary* |
| Example: City Life |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

4) Name all your Staff (feel free to attach additional document)

|  |  |  |
| --- | --- | --- |
| *NAME* | *CORE MINISTRY* | *TITLE* |
| Example: Joe Smith | Campus Life | Campus Life Director |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

5) What are your Chapters’ donation designations and sub-designation?

Please reference this document for more detailed information: <https://salesforce.yfc.net/uploads/default/YFC_Fundraising_Structure_of_Salesforce_Fund_Mapping6.23.15.pdf>

Designation fields indicate HOW the money will be used. It is the financial purpose--what the donor will “feel good” about giving to and see on their donation receipt. Base rules for designations are as follows:

What constitutes a designation?

* A Core National Ministry
* A designation that you track as a revenue/expense category in your accounting software (e.g. General Fund)
* A designation that is reoccurring on an annual or semi-annual basis (i.e.: Auction, Golf Tourney, etc.). Non-qualifying events will be tracked as "Campaigns"
* A designation that represents 5% or more of your total Chapter revenue (Core National Ministries excluded as they are automatic designations)
* Do not include staff on this list

|  |  |
| --- | --- |
| *DESIGNATION* | *SUB-DESIGNATION (if any)* |
| Example: Campus Life | West High School |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

6. Who is your current Credit Card/ACH Processor? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Are you looking to switch in the near future? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7. Identify what you currently do in your current database system.

Examples:Pledge Receivables, Check Processing, Receipting, Emails, any reports critical to your operations, etc.