**YFC Salesforce Solutions**

**Local Salesforce Configuration Worksheet**

Please answer these questions to get started with Salesforce:

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

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

2) Name your current fundraisers (events/appeals and what if funds)

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| NAME | ONGOING or SEASONAL | WHAT IT FUNDS |
| Example fundraiser | Seasonal event – June/July | General Fund |
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3) Name your current ministry programs (use unique local names if necessary)

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| *YFC CORE MINISTRY* | *UNIQUE LOCAL NAME if necessary* |
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4) Name all your Staff (feel free to attach additional document)

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| *NAME* | *PROGRAM* | *TITLE* | *PROGRAM* |
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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**

* IS a Core National Ministry (see core ministry detail below). OR
* IS a designation that you track as a revenue/expense category in your accounting software (e.g. General Fund). OR
* IS 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". OR
* IS 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.

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| *DESIGNATION* | *SUB-DESIGNATION (if any)* |
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**6. Who is your current Credit Card Processor?**

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| *CC Processor* | *Will they give access to Recurring Credit Card Numbers (Yes or No)* |
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**7. We estimate implementation will take 5 weeks. Identify two 5 week preferences, between March 1st and Nov 30th, that would best work to schedule your implementation. We will work to provide you 1 of your preferenced times however this is not guaranteed.**

|  |  |
| --- | --- |
| *Preference 1* | *Preference 2* |
|  |  |

**8. Identify what you currently do in Raisers Edge, Examples being: Pledge Receivables, Check Processing, Receipting, any reports critical to your operations, etc:**