

New Members and Salesforce

TA Accounts that are not in Salesforce

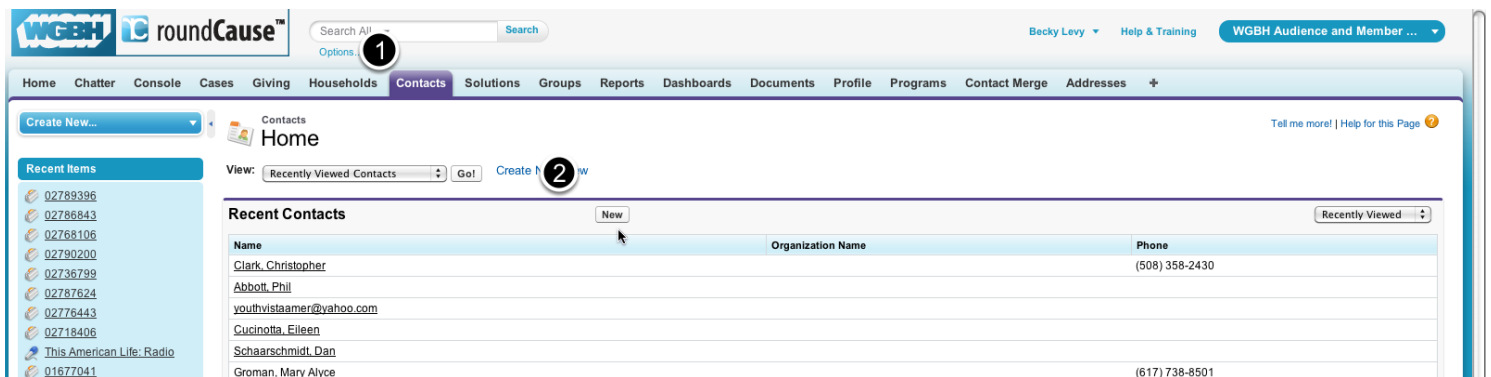
New members ***who are not yet in TA, or who are in TA but who have not yet migrated to Salesforce*** will need to be ***added into Salesforce as contacts*** in order to be able to create a case, send an email, create tasks, etc.

However, we are ***not a able to create households in Salesforce***, these must be entered into TA and then they will migrate over to Salesforce overnight.

This creates an issue as all contacts need to have a Household and all Households should have at least one contact, so when a contact is created without a Household in Salesforce it becomes an "orphan", meaning it doesn't have a Household attached.

In order to limit the number of "orphans" in salesforce the following process should be followed:

Contact Creation



If a member is in Salesforce, and not in TA, or if they have just pledged and are not in TA as of yet, they will need a contact in Salesforce. You should only create the contact, and not a household

1. Select the "Contacts" tab
2. Select the "New" button

Add Contact in Salesforce

roundCause™

Search All... Search

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Home Chatter Console Cases Giving Households **Contacts** Solutions Groups Reports Dashboards Documents Profile Programs Contact Merge Addresses +

Create New... Contact Edit New Contact

Contacts not associated with organizations are private and cannot be viewed by other users or included in reports.

1 2 3

Save Save & New Cancel

Contact Information

First Name Last Name Middle Name Suffix Title Household Preferred Address Annual Giving Level

Available: WGBH Membership, WGBY Membership, Cape & Islands Membership, WGBH Leadership

Chosen

Marketing Rating Lead Source - Most Recent

TA Information

TA Contact Id Contact Status (Active) Contact Owner (Becky Levy) TA Status Organization Name Department Contact Type (None) Deceased Flag Date of Death Comments Child Contact Web Site

1. Fill out the "New Contact" information
2. Mark the account as "active"
3. Save the contact
4. Create the new case per regular process

Creating a Merge Reminder Task

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Home Chatter Console **Cases** Giving Households Contacts Solutions Groups Reports Dashboards Documents Profile Programs Contact Merge Addresses +

Create New... Case 02777698

Back to List: Cases

Case Comments (4) Solutions (0) Open Activities (0) Activity History (1) Emails (0) Attachments (0) Related Cases (0) Case Team (0) Case History (1)

Open Activities 1 New Task New Meeting

No records to display

Contact Email Household Mr. Ernest Godbout Contact Date 4/13/2011 Case Origin Email Station WGBH Type Membership Case Topic Pledge/Payment Case Sub Topic Chark Refund

Case Number 02777698 [View Hierarchy] Parent Case Status Open Priority Medium Escalated

You have now created an "orphan" contact in Salesforce. It is important to remember to **merge this contact with the household and contact that will come over from TA** in order to prevent duplicate accounts.

To help you remember, create a new task from inside the case that you have created by **hovering over "Open Activities" and clicking "New"**

Task Edit [Save] [Save & New Task] [Save & New Meeting] [Check Spelling] [Cancel]

Task Information ! = Required Information

Assigned To: **1** User: Related To: **4** Case:

Subject: Name:

Type: Phone: (508) 883-2358

Priority: Email:

Status:

Due Date:

Comments **2**

Comments:

☐ Send Notification Email

Recurrence

☐ Create Recurring Series of Tasks

Reminder **3**

Reminder: ☐ 7/21/2011 8:00 AM

1. Name the task subject *Merge Contact to Household*
2. Use the comments to list any specific details as needed
3. Make sure the task is related to a case and that the contact information is listed (this is done automatically when you create the task from the case tab)
4. Change the reminder for 48 hours from the time the task was created

Locating the Household

Search Results Help for this Page

Record Results **Chatter Feed Results** New!

Contacts [7] [Show Filters](#) [Customize...](#)

Action	Name	Household	Phone	Email	Preferred Address	TA Contact Id	Mailing Street	Mailing City	Mailing State/Province	Mailing Zip/Postal Code
Edit	Ernest Smith	Ernest Smith			40 Grove Street, Scituate, MA - 02066	908711_01_I				
Edit	Ernest Smith	Anne H. & Ernest Smith	(508) 548-3333		PO Box 52, Woods Hole, MA - 02543	409992_02_I				
Edit	Ernest Smith	Ernest & Nancy Smith	(508) 432-7646		38 Park Street, Harwich, MA - 02645	1246527_01_I				
Edit	Ernest Smith	Mr. Ernest A. Smith	(413) 268-7627		68 North St, Williamsburg, MA - 01096	90333416_01_I				
Edit	Ernest Smith	Mr. Ernest Smith	(508) 386-2558		14 Anderson Street, Taunton, MA - 02780	1872287_01_I				
Edit	Ernest Smith	Mr. Ernest Smith	(413) 572-1569	ernest.smith@mabarn.ang.af.mil		1650794_01_I				
Edit	Ernest Smith	Mr. Ernest W. Smith	(860) 658-6279	lokarenabovone@gmail.com	21 Ox Yoke Dr, Simsbury, CT - 06070	90349077_01_I				

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Households [7] [Show Filters](#) [Customize...](#)

Action	Household Name	Household Phone	Preferred Address	Owner Alias	TA Account ID	Warning	Mailing Address	Mailing State/Province	Mailing Street	Mailing Zip/Postal Code
Edit	Ernest Smith		40 Grove Street, Scituate, MA - 02066	WGBH	908711					
Edit	Mr. Ernest Smith	(413) 572-1569		WGBH	1650794					
Edit	Mr. Ernest Smith	(508) 386-2558	14 Anderson Street, Taunton, MA - 02780	WGBH	1872287					

In two days, you should check to see if the Household has come over from TA by searching for it again using the salesforce search function.

Moving the Case to the Correct Contact

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Search All... Search

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Home Chatter Console **Cases** Giving Households Contacts Solutions Groups Reports Dashboards Documents Profile Programs Contact Merge Addresses +

Create New... Case 02791091 Customize Page | Edit Layout | Printable View | Help for this Page

Recent Items

- 02791091
- Martha Butler
- 02790200
- 02786843
- 02777698
- 02768106
- 02736799
- 02789396
- Becky Levy
- Ernest Smith

Messages and Alerts

Tags

Recent Tags

Custom Links

WGBH.org

Case Comments (0) | Solutions (0) | Open Activities (1) | Activity History (0) | Emails (1) | Attachments (0) | Related Cases (0) | Case Team (0) | Case History (3)

Case Detail

1 Contact Name Save Cancel

2 Contact Email

Household

Contact Date 7/20/2011

Case Origin Email

Station WGBH

Type Membership

Case Topic Marketing/Communication

Case Sub Topic Mailing Preference

Rating Neutral

TV/Radio Program

Case Owner Dennis Milford [Change]

Case Number 02791091 [View Hierarchy]

Parent Case

Status Open

Priority Medium

Escalated

Additional Information

Subject Unsubscribe email

Description A constituent attempted to cancel their email subscription by selecting the unsubscribe link, but that link was corrupted for some reason. As a result, the Profile of this constituent has not been updated to

Once you have found the TA created Household and Contact you will need to **move the case from the contact you created, to the system created contact** (this will include member's contact information as well as the Member's account number)

1. Change the name of the contact on the case to the correct, system created contact
2. Save the edits to the case

This will move the case from the old contact, to the new contact.

Note: If the contact has not come over from TA in 48 hours, then assign the task to a Manager for further follow-up

Deleting the Old Contact

The screenshot shows the roundCause web application interface. At the top, there's a navigation bar with tabs like Home, Chatter, Households, **Contacts**, Cases, Solutions, Giving, Documents, Dashboards, Reports, Profile, and Programs. The 'Contacts' tab is active. Below the navigation bar, there's a search bar and a 'Create New...' button. On the left sidebar, there's a 'Recent Items' list with entries like 'Andries Van Dam', '02636706', 'Al Abramson', '02791563', 'WGBH Anonymous 2011', '02733788', '02791558', 'Carol Freedman', '02791556', and '02791550'. The main content area displays the contact profile for 'Andries Van Dam'. A red box highlights the 'Open Activities' link in the top navigation bar. Below the contact name, there are buttons for 'Show Chatter', 'Follow', 'Back to List: Users', 'Cases (1)', 'Addresses (0)', 'Open Activities (0)', 'Activity History (0)', 'Notes & Attachments (0)', 'Recurring Gifts (0)', 'Proposal/Pledge (0)', 'Relationships (0)', 'Salutations (1)', 'HTML Email Status (0)', 'Campaign/Program History (0)', 'Planned Giving (0)', and 'NotePads (0)'. The 'Contact Detail' section shows fields for Name, Middle Name, Suffix, Organization Name, Household, Household Mailing Address, Marketing Rating, and Lead Source. The 'Contact Information' section shows fields for Preferred Phone, Home Phone, Work Phone, Mobile, Fax, Email, Preferred Email, Household Email, Personal Email, and Work Email. The 'Contact Detail' section also includes buttons for 'Edit', 'Clone', 'Request Update', and 'Conga Composer'.

In order to make sure the data in the system is kept as clean as possible, the orphan contact that you created will need to be deleted. Contacts can be deleted, but it will need to be done by a Manager.

Create a new task from inside the **contact** hat you have created by **hovering over "Open Activities"** and clicking **"New"**

Creating and Assigning the Delete Task

The screenshot shows the 'New Task' form in the roundCause system. The form is titled 'Task Edit' and includes several sections: 'Task Information', 'Comments', 'Recurrence', and 'Reminder'. Numbered callouts (1-6) highlight specific fields and actions:

- 1**: 'Assigned To' field, set to 'User: Becky Levy'.
- 2**: 'Subject' field, set to 'Delete Contact'.
- 3**: 'Related To' section, showing 'Giving' as the category and 'Contact: Josh Mattie' as the related item.
- 4**: 'Comments' section, with a text area containing 'Delete orphan contact'.
- 5**: 'Send Notification Email' checkbox, which is checked.
- 6**: 'Reminder' section, showing a date of '7/21/2011' and a time of '8:00 AM', with the reminder checkbox unchecked.

The form also includes a 'Task Information' section with fields for 'Type' (set to 'To Do'), 'Priority' (set to 'Normal'), 'Status' (set to 'Not Started'), and 'Due Date' (set to '7/21/2011'). At the bottom, there are buttons for 'Save', 'Save & New Task', 'Save & New Meeting', 'Check Spelling', and 'Cancel'.

1. Assign a task to Becky (or Chris as a backup)
2. Name the task subject *Delete Contact*
3. Make sure the **task is related to the contact that should be deleted** (this is done automatically when you create the task from the contact tab)
4. Use the comments to list any specific details as needed
5. Check the *send notification email* box
6. Remove the reminder date and time by unchecking the box