New Members and Salesforce

TA Accounts that are not in Salesforce

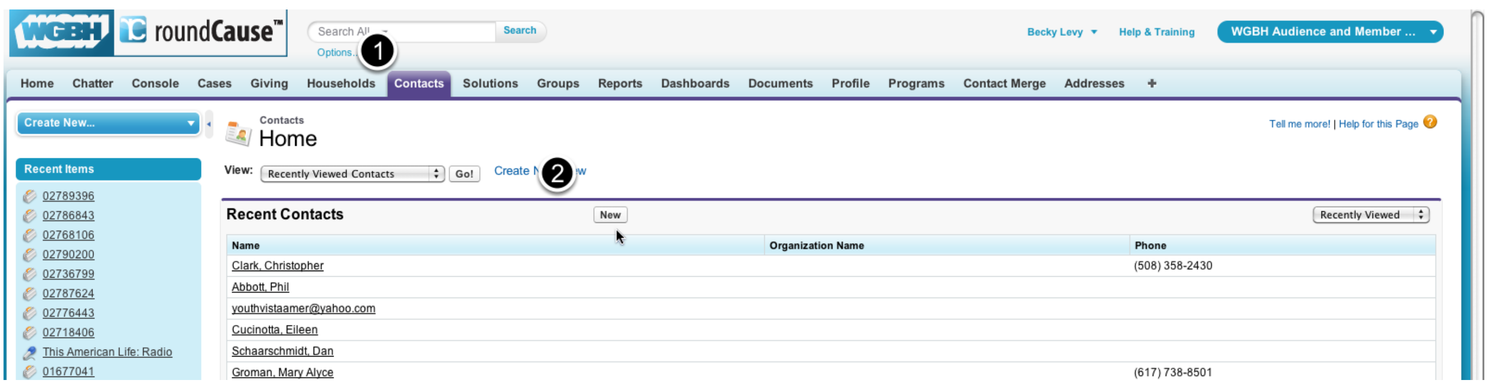
New members ***who are not yet in TA, or who are in TA but who have not yet migrated to Salesforce*** will need to be ***added into Salesforce as contacts*** in order to be able to create a case, send an email, create tasks, etc.

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

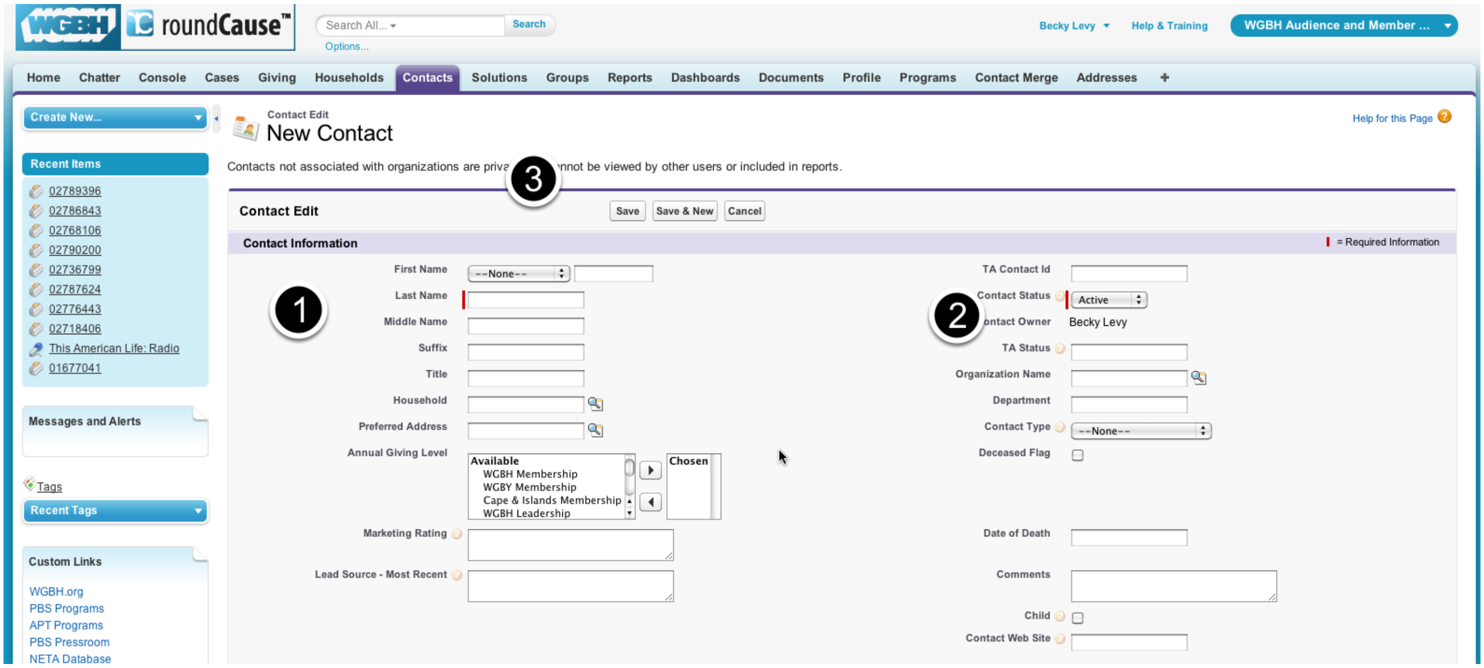
Contact Creation



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

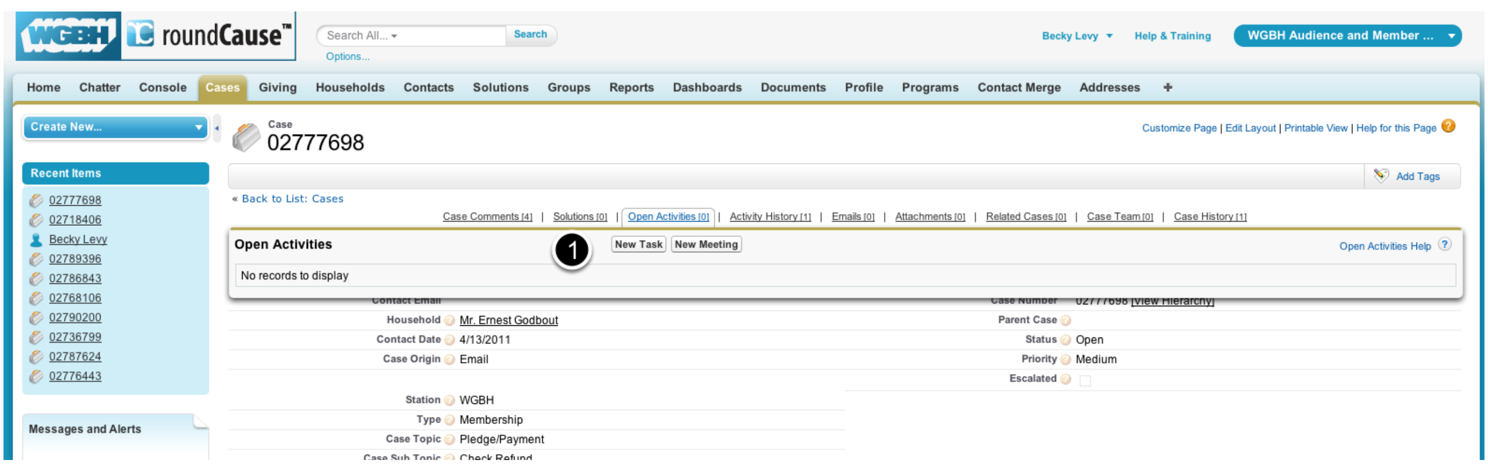
1. Select the "Contacts" tab
2. Select the "New" button

Add Contact in Salesforce



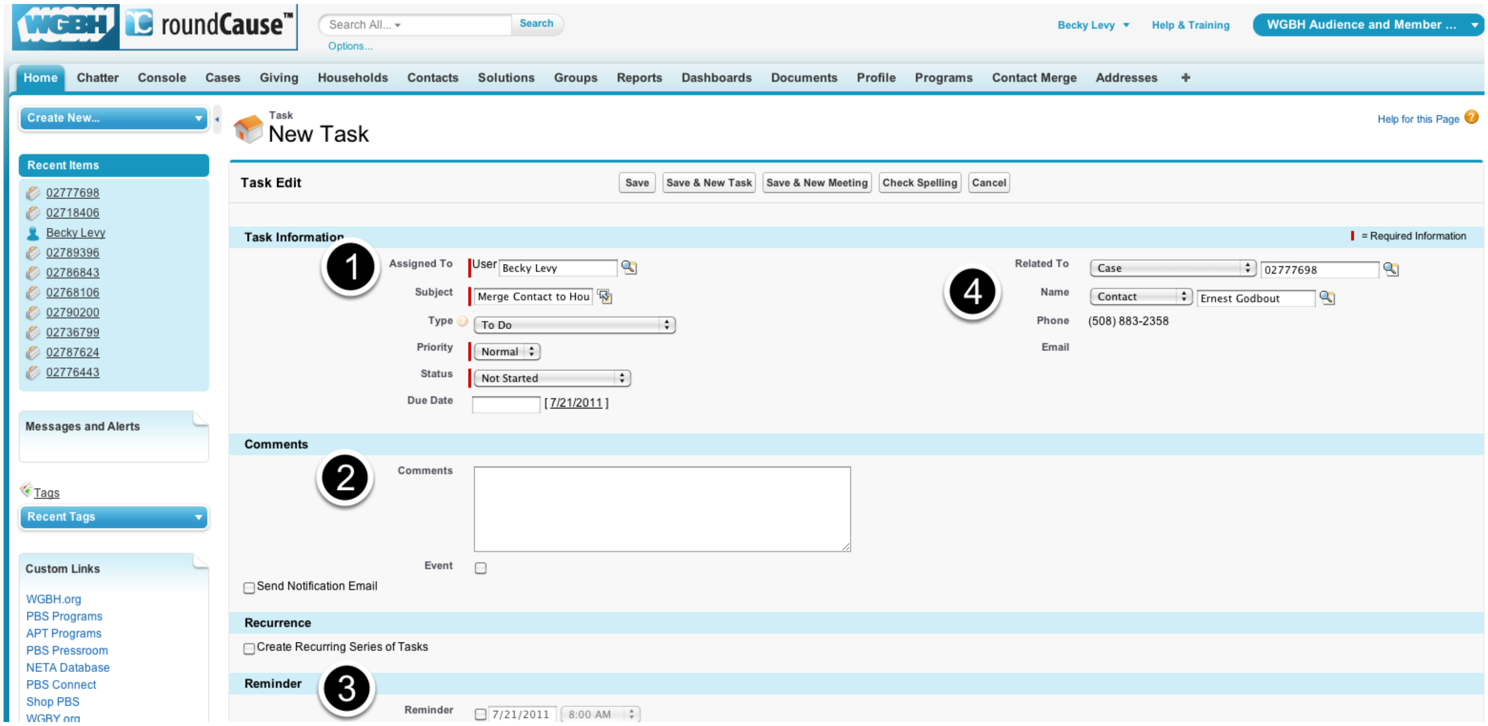
1. Fill out the "New Contact" information
2. Mark the account as "active"
3. Save the contact
4. Create the new case per regular process

Creating a Merge Reminder Task



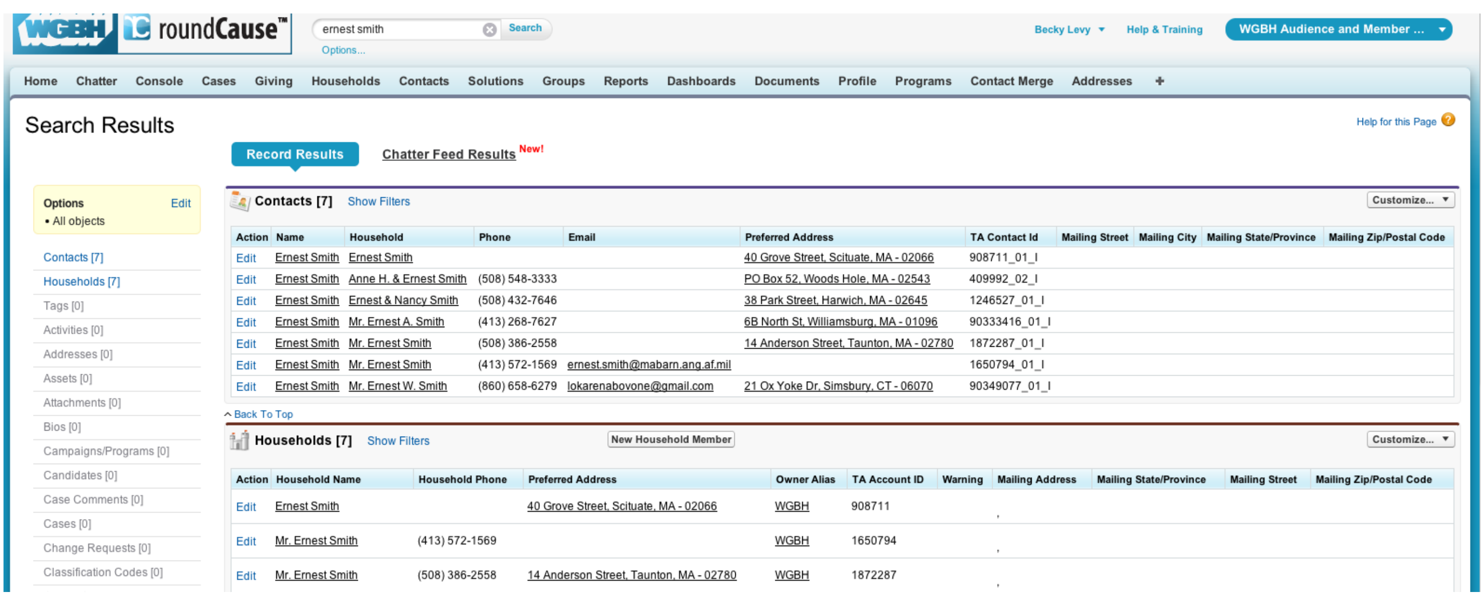
You have now created an "orphan" contact in Salesforce. It is important to remember to ***merge this contact with the household and contact that will come over from TA*** in order to prevent duplicate accounts.

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



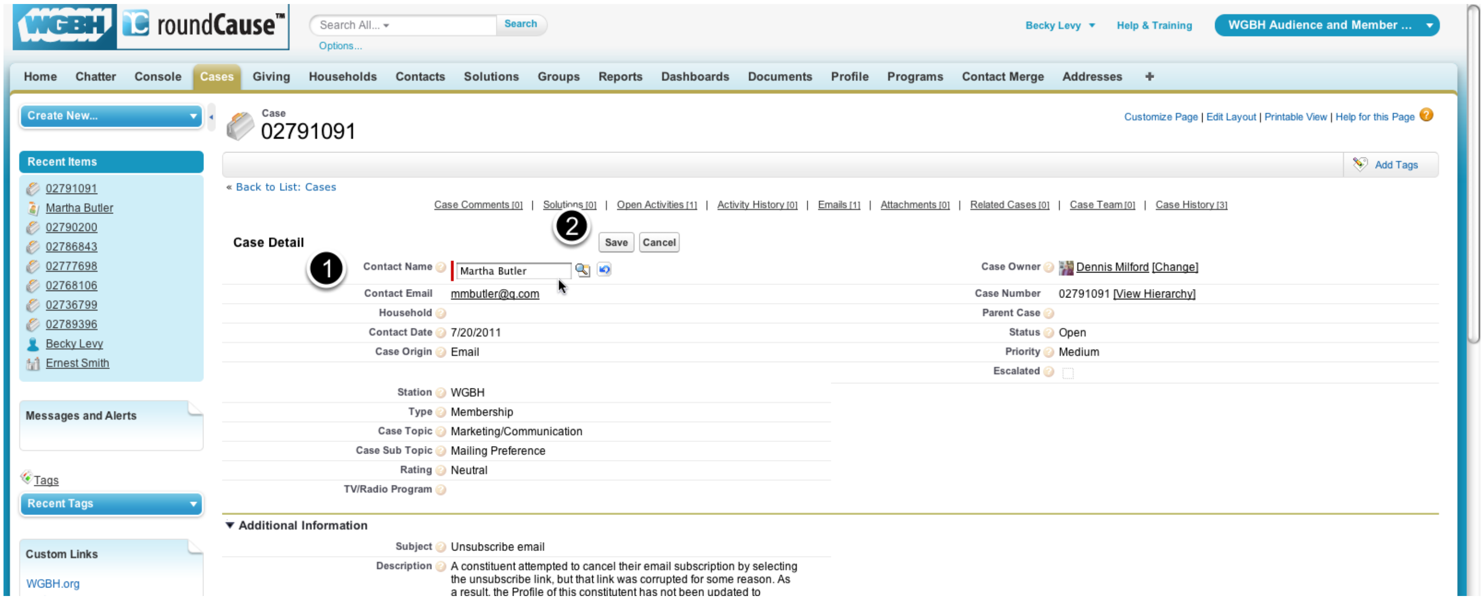
1. Name the task subject *Merge Contact to Household*
2. Use the comments to list any specific details as needed
3. Make sure the task is related to a case and that the contact information is listed (this is done automatically when you create the task from the case tab)
4. Change the reminder for 48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

Locating the Household



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



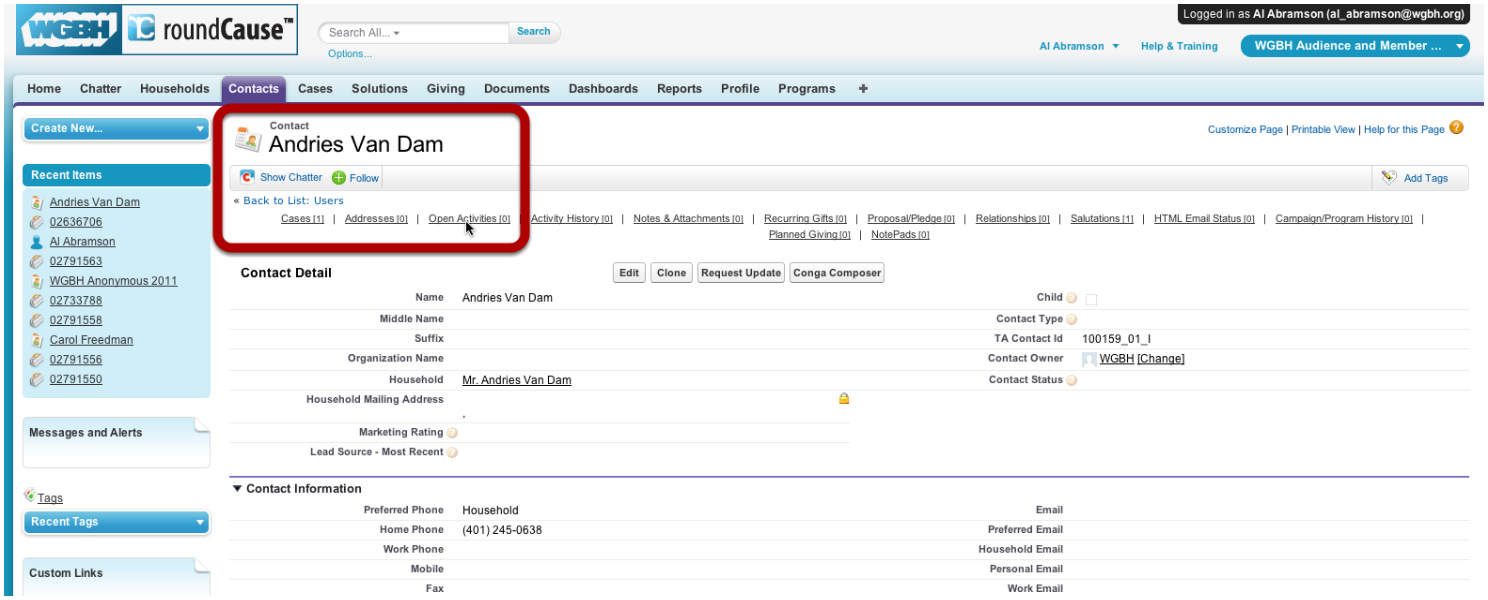
Once you have found the TA created Household and Contact you will need to ***move the case from the contact you created, to the system created contact*** (this will include member's contact information as well as the Member's account number)

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

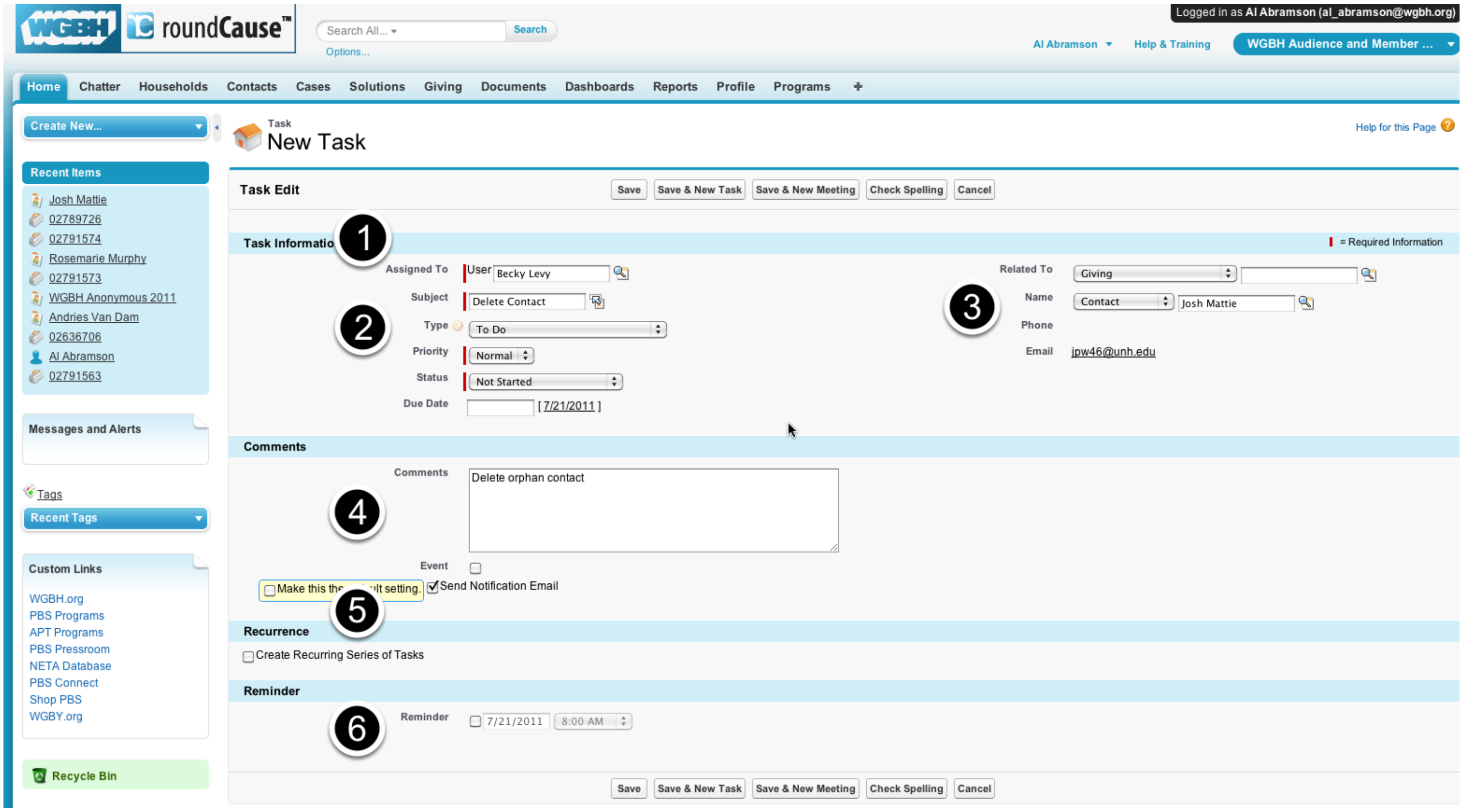
Deleting the Old Contact



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



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