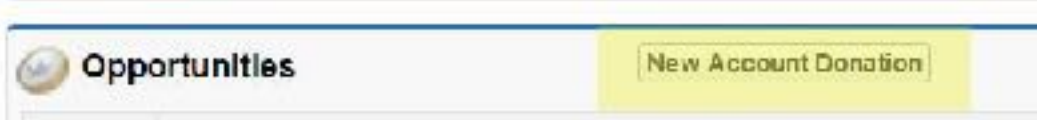


## How to generate Membership Letters (Batch)

1. Log into Salesforce
2. Click Accounts tab or search for Account Name
3. Click New Account Donation button



4. Edit Opportunity Details

A screenshot of the Salesforce 'New Opportunity' form. The form is titled 'Opportunity Edit' and 'New Opportunity'. It contains fields for Opportunity Name, Account Name, Amount, Close Date, Lead Source, Type, Description, Primary Campaign Source, Recurring Donation, Stage, and Probability (%). The 'Save' button is highlighted in yellow.

- a. Opportunity Name (1)
  - i. Flintstone Industries - 2017 Community Partner Invoice
  - ii. Flintstone Industries - 2016 Christmas Parade
- b. Enter Close Date (2)
- c. Enter Primary Campaign Source (3)
- d. Change Stage to Invoiced (4)
- e. Click Save (5)

5. Click DREAM Invoice button

A screenshot of the Salesforce 'New Opportunity' form. The 'DreamInvoice' button is highlighted in yellow. Below the buttons, the form shows the following information: Opportunity Name: Flintstone Industries - 2017 Community Partner Invoice, Primary Campaign Source: Flintstone Industries - 2016 Christmas Parade, Recurring Donation: No, Stage: Invoiced, Probability (%): 70%.