SalesForce User Manual

NPSP Subscription Information

Organization Name: Welcome Housing

Salesforce.com Organization ID: 00D4T000000GKjW

Organization Edition: Enterprise Edition

Instance: NA136

Server: na136.salesforce.com

10 Free NPSP Licenses

10 Free Marketing Licenses

10 Free Service Cloud Licenses

More information found under Company Information in Setup.

Features

Contact

A contact is any client that utilizes Welcome Housing's Services. Contacts have a name, date of birth, address, phone number, type. Contact types are: Housing Service, Tenant, Trustee Service, and Other.

Create a contact by hovering over the down arrow on the 'Contacts' tab and selecting 'New Contact.' Enter the required information including name, date of birth, address, and client type.

Task

A task records any interaction that a contact may have with the Welcome Housing. A task had a subject, associated staff member(s), type, date created, due date, status and priority. Tasks can also be used to record bill and rent collection. Task types include bill, rent, and general meetings.

Create a task by clicking the 9 clustered dots at the top left near the ‘Nonprofit Success Pack’ label. Locate ‘Task’ by scrolling alphabetically or by searching ‘Task.’ Enter the required information including Subject, Due Date, type, priority and Affiliations.

Report Generator

The report generator can generate reports on any object in SalesForce. The reports are completely customizable and can be displayed in list format or chart format.

Create a report by hovering over the down arrow of the ‘Reports’ tab and select ‘New Report.’ Choose the object group that the data will be derived from. Select the group columns and filters to best create the report desired. Choose a graph or chart to represent the data at the top right corner. Remember to include a name and save.

Document Uploader

Documents, images, and files of any type are able to be uploaded to a specific contact.

Upload documents to a contact by selecting the specific contact, or head to the contact page. Choose Related, then scroll to the bottom and choose ‘Files.’ View, select or upload files here.

Setup View

Setup is were the SalesForce software can be edited and manipulated. If an object needs to be updated in anyway, or if information about the organization needs to be changed, one can access the Setup to complete this. Setup icon is a ‘gear’ with a lightning rod in the middle and can be found at the top right corner of the interface. It is recommended to open Setup in a new tab.

Forums/Other Resources

Power of Us Program (PowerOfUs.force.com)

The Power of Us program allows for Nonprofits and Educational Institutions to access SalesForce through NPSP with 10 free subscriptions, and allows for other discounts on SalesForce products. The program also provides training resources, and engagements or connections with other nonprofits and educational institutions using SalesForce through the Power of Us Hub.

SalesForce General Forum and Trailblazer (Success.SalesForce.com)

Trailblazer is a SalesForce online community that provides training resources, and a forum for all SalesForce related issues. The training resources are very extensive and detailed. There are often SalesForce certified developers who provide answers to topics.

Testing Materials

SalesForce NPSP Testing Checklist			
Tested By	Welcome Housing Employees	Date	Dec 4, 2019
Application Name	SalesForce NonProfit Success Pack (NPSP)		

Procedure	Directions/Hints	Outcome (Pass/Fail)	Notes
Basic Functionality			
Create 5 contacts	Enter in all the required fields, varying the contact type		
Delete 1 contact	Delete contact created above or other		
Schedule a meeting with a contact	Task types include meetings, bills, rent, other, etc		
Create a power bill for a contact	Remember to add a **due date**; Task types include meetings, bills, rent, other, etc		
Create a report of client type	Type can be selected from the group column		
View the report of client types			
Create 3 new bills	Remember to add a **due date**; Task types include meetings, bills, rent, other, etc		
Create 2 new rent tasks	Remember to add a **due date**; Task types include meetings, bills, rent, other, etc		
View the total ongoing tasks	Sort by due date		