Organizations Account Overview

<u>Purpose</u>: Provide very basic instructions for volunteers to accurately enter, update and manage Organization records.

<u>Overview</u>

This set of instructions presumes familiarity with an earlier tip sheet for Manual Membership Data Entry. Each Contact must be associated with an Account record.

For most nonprofits, the majority of their accounts will be Household Accounts.

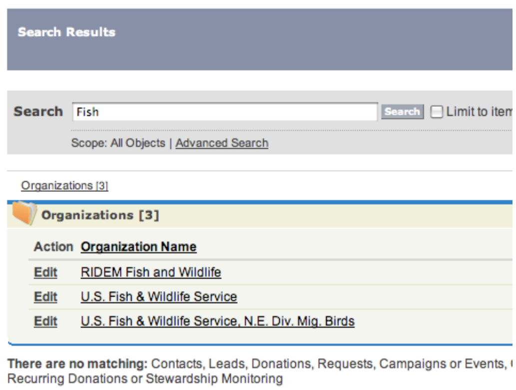
For an Organization Account, it is important to always have at least one Contact. Since many nonprofits base their mailings on selections the Contact record or some combination of the Account and Contact records, it is important to consider future communications as you enter and manage Organization Account records in Salesforce.

The new "Affiliated Contacts" record is a helpful way to track relationships with a specific Organization Account where the contact is primarily associated with a Household Account.

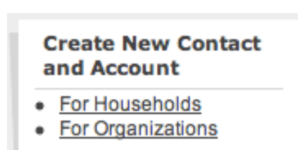
There is quite a bit of variation between nonprofits in entering and reporting on contact relationships for organizations which can be accommodated in Salesforce.

Entering New Organization Accounts

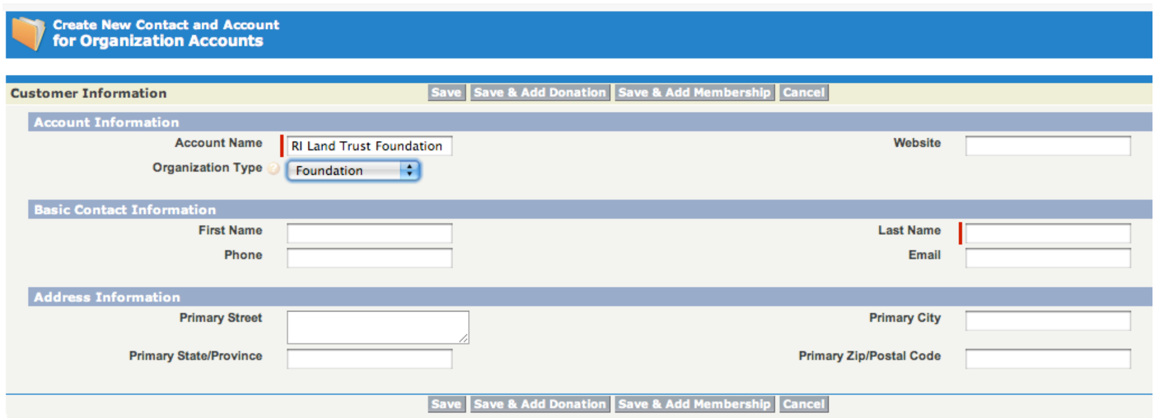
1. **Double check that the Organization you plan to add is not already included in your Salesforce database.**
   a. First, try typing the last name of the organization into the blank box of the Search field on the upper left hand side of your screen. Click on the 'Go!' button.
   b. A partial name, especially if it is unusual can be used to locate the Organization record. Search will pull all types of records which can be helpful if you are having trouble locating an Organization Account record. Particularly beware of abbreviations that could be missed in a search. For example, state abbreviations such as RI instead of Rhode Island.
   c. Example – In the search, shown below, for an Organization Name including the word 'Fish', three different organizations were found. If you have found the Organization, to work on its record be sure to click over the <u>Edit</u> button before its name. In this example no other types of records were found in the search but it is possible that someone named Fish might have been found along with their donation records. Be sure to select a blue organization record.



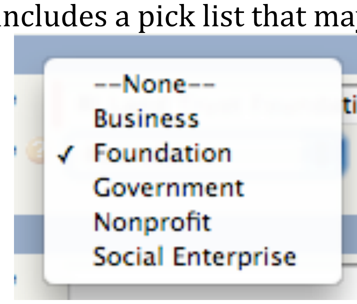
2. If this type of search, did not locate the Organization, create a new organization. Entering an Organization Account is very similar to adding Household Accounts in Tipsheet 1. Select For Organization in the Create New Contact and Account sidebar.



3. Throughout Salesforce, Organization record tabs and bars are color coded in blue.



a. The Organization Account required fields are slightly different from the Household Account fields.
b. 'Account Name' - Carefully select the name to be entered. Choose complete words unless the acronym is both the formal and most commonly used name. Otherwise enter a formal name that will be used in communications and future 'lookups' of this organization. In doubt? Contact your volunteer advisor.
    i. Note – Corporate matching gifts are set up to come from an independent foundation set up by a corporation. If this is your purpose in entering an organization, put this information into the record rather than the for-profit corporation.
c. Other than 'Account Name', Contact Last Name is the only required field. Every Organization Account must have at least one contact.
d. 'Website' is a unique Organization Account field.
e. The 'Organization Type' includes a pick list that may be customized.



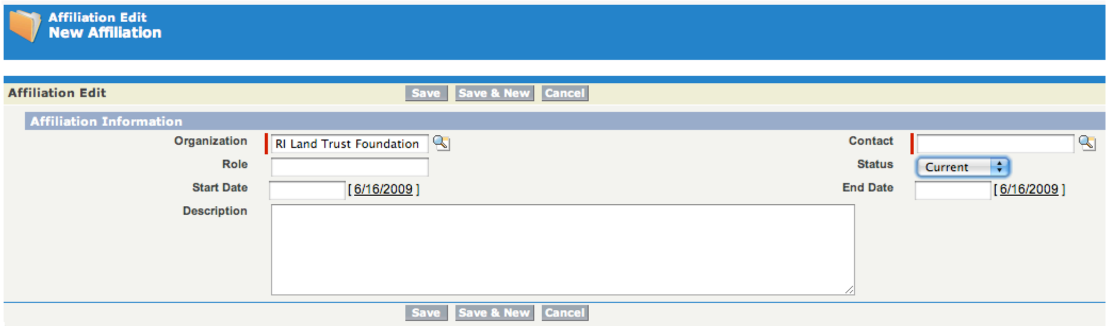
f. Pick the appropriate option and click the 'Save' button.

4. Double check your entries and click either 'Save' button.
    a. Note that in the new nonprofit template, you have the option to immediately record a membership or any other type of donation.
5. If 'Save' is selected , the next screen displayed is the Organization's Contact's detail record. This Contact's 'Contact Status' will be automatically set as 'Active'.
    a. You may want to edit the mailing and other contact fields at this time. Refer to Tipsheet 6 on Entering Mailing Options.

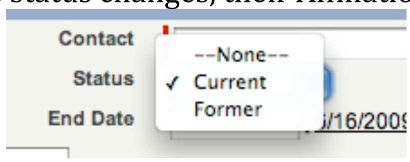
Affiliated Contacts

1. Return to the new Organization Account record, by clicking the organization name in the sidebar.
2. Nearly all the fields and sections are identical to those for Household Accounts.
    a. **'Parent Organization'** is more advanced than these directions. Use of this feature is not a common for most land trusts and watershed organizations. But it is possible to set up a hierarchical relationship between organizations such as local and national offices of a corporation or non-profit or related state agencies.
3. One other notable exception is the unique section for 'Affiliated Contacts', a new feature in the new nonprofit template.
4. In this example, the organization's one Contact is shown under the Contacts section and under the Affiliated Contacts section.

5. **An Organization Contact will always have a corresponding Affiliated Contact record.**
6. When a Contact is added to an Organization Account, a corresponding Affiliated Contact record will also be created.
7. A new Affiliated Contact record may be created for Contacts in your database without adding them to the Organization Contacts by using the 'New Affiliates' button.

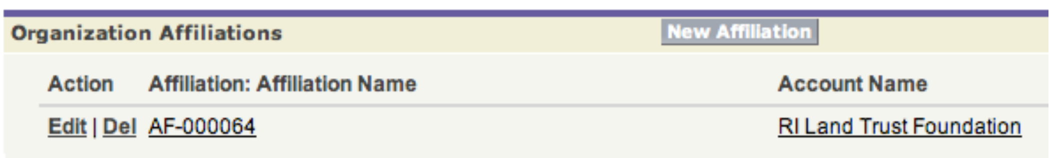


a. Use the lookup button to link the contacts.
b. As a Contact's status changes, their Affiliation record 'Status' can be adjusted.



c. The description field can be standardized to include meaningful standard descriptions that can be included and sorted in reports such as 'Board Member', 'Major Donor', 'Staff'.

8. Each Contact's Organization Affiliations are shown in their Contact detail record. New Affiliations can also be added from within the Contact's record using the button shown.



9. Contact/Organization Affiliations are helpful in managing mailing for organizations, recognizing affiliations of contacts and capturing contact relationships with several organizations. It provides an additional dimension of connections to your database.