SALESFORCE PLAYBOOK

2nd Edition

Chapter Administration Communities

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MEMBER's VIEW

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APPENDIX

Glossary of Terms

Help! "My screen looks different…"

Membership Questions? **WHO TO ASK**

Contact us:

Support@email

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Foundational Concepts

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Basic Salesforce Terminology

Here are some key terms to become familiar with as you learn more about Salesforce. These are the Salesforce objects that will be used as you work with data in Salesforce

Term	Definition
Contacts	**Contacts are people:** Members, Children, Spouse/Partners, Management Team or Chapter Administrators in Salesforce. Contact Records contain information about individuals.
Accounts	**Accounts are groups of people.** They can represent internal (Chapter, Networks, Forums, Committees) or external (Business, School, Tradeshow, Association) groups of people.
Account Affiliations	The link that associates an Account (Chapter, Network, Business, School, etc.) to a Contact (Member, Spouse/Partner, etc.).
Positions	A distinct officer or champion role within a YPO Community (Account). Examples include Chapter Chairs, Regional Membership Officers and Network Communications Officers.
Contact Positions	The link that associates a Contact (Member, Spouse/Partner, etc.) with a Position (Champion role) inside an Account (Chapter, Network, etc.).
Households / Relationship	Households are families. Relationships link Contacts to a Household and represent the family members within that household. Members, Spouse/Partners, and Children can be linked together in a household.
Leads	Leads are prospective members that YPO may be interested in. Leads can be entered through a YPO Application on YPO.org or manually by a Chapter Administrator or Chapter Membership Officer.
Activities	Activities are used to track your interactions with different records (example: Contact or Account). Tasks are to-do items. Log a Call and Email are examples of activities. Completed tasks and activities reside in the Activity History of a record.
Reports	Reports return sets of records that meet certain criteria and display in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Additionally, reports can be built for Chapters or Regions and shared with Salesforce users through folders.
Dashboards	Dashboards provide graphical representations of reports for insight into key data, metrics, and trends. They can be acted on in real time.

*See the **Glossary** section for a full list of terms and definitions.*

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Salesforce and Connect Profiles

- Connect profiles display many familiar Salesforce objects. Notice how the concepts transfer across to Salesforce.

salesforce basic terminology

CONTACT RECORDS contain information about individuals.

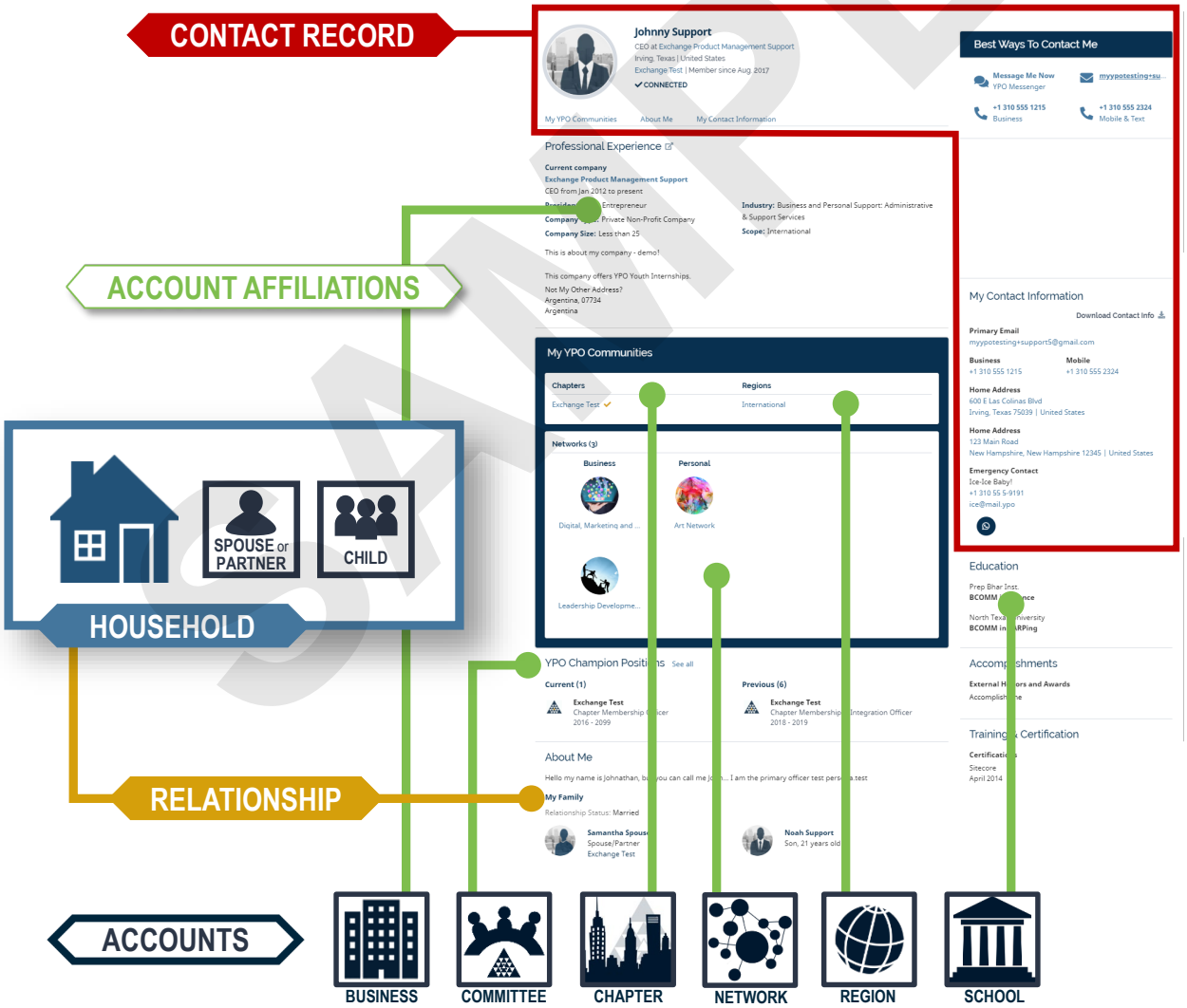
- (Members, spouse/partners and children are all Contacts.)

RELATIONSHIPS link contacts with family in a HOUSEHOLD.

ACCOUNTS are groups of Contacts

- (Chapters, Regions, Networks, Forums, Committees are all Accounts.)

ACCOUNT AFFILIATIONS link the various Accounts to Contacts



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Salesforce Organizational Concepts

YPO

YPO PROSPECT

LEADS

Leads are prospective members during the membership Prospect Process in Salesforce.

PROSPECT PROCESS: When a Lead is converted to a Member, the information moves to a new **CONTACT RECORD.**

MEMBER CONTACT

Each person in Salesforce has a contact record. **CONTACT RECORDS** contain information about the individual.

YPO CONTACT TYPES

MEMBER

SPOUSE or PARTNER

CHILD

RELATIONSHIPS

HOUSEHOLD

RELATIONSHIPS link contacts with family in a **HOUSEHOLD**. Contacts that have a link to the same HOUSEHOLD are part of a family.

The **ACCOUNT AFFILIATIONS** are the links between any Contact and any Account type.

ACCOUNT AFFILIATIONS

YPO ACCOUNT TYPES

CHAPTER

REGION

NETWORK

COMMITTEE

FORUM

EXTERNAL ACCOUNT TYPES

BUSINESS

SCHOOL

TRADESHOW

ASSOCIATION

ACCOUNTS are groups of people.

External Accounts can be entered from an Connect Profile.

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NOTES

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Using Global Search

1

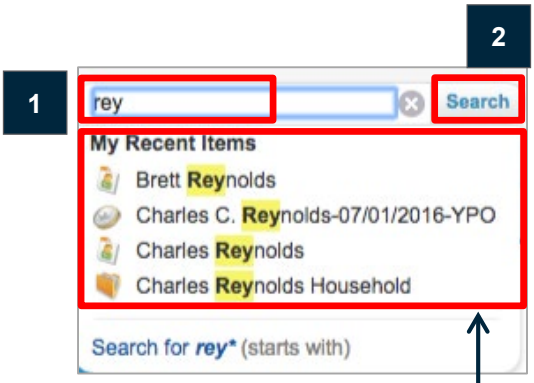
The Global Search Box helps you quickly locate all different types of records. Click in the **Global Search** bar located at the top of the page.

2

Click **Search** or click directly on record if it populates below.

HINTS & TIPS

Please refer to the table to find Search Operators you can use to further refine your Search Results.



Salesforce remembers when there are records you recently viewed or edited that contain the search text you enter. Links to these records will display in the My Recent Items section just below the Global Search bar. Clicking a link there displays that record directly and no search will be conducted.

Search Operators	Description
* (asterisk)	Use the *(asterisk) wildcard to refine results. Use * to match one or more characters. For example, searching for Bob J* finds items with Bob Jones or Bob Johnson.
AND	Finds items that match all of the search terms. For example, acme AND Texas finds items with both the word acme and the word Texas. In Search Options, using AND is optional, as searching for acme Texas is the same as searching for acme AND Texas.
OR	Finds items with at least one of the search terms. For example, acme OR Texas finds items with either acme or Texas for both words.
AND NOT	Finds items that do not contain the search term. For example, acme AND NOT Texas finds items that have the word acme but not the word Texas.
“” (quotation marks)	Use quotation marks around search terms to find an exact phrase match in Search or Search Options. This can be especially useful when searching for text with punctuation. For example, “acme.com” finds items that contain the exact text acme.com. A search for “Monday meeting” finds items that contain the exact phrase Monday meeting.
? (question mark)	Use the questions mark (?) to match a single character. For example, searching for jo?n finds items with John and Joan

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Viewing Search Results

The results of a Global Search display on the Search Results page. The column on the left allows you to narrow what record types are displayed in the results, or optionally to search Chatter feeds. The main section displays records (or Chatter feed items) that match the search criteria. Once you find the record you need, click on the record Name to view it.

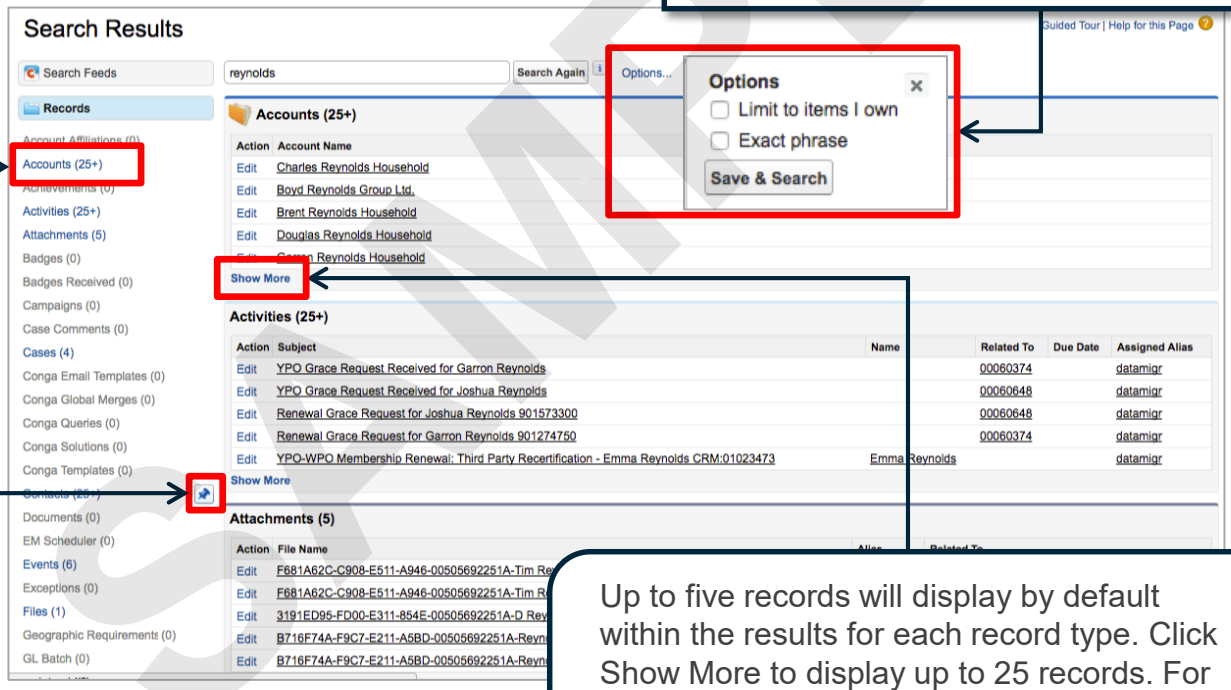
Note: Search Results will only display records that your Salesforce permissions allow you to access.

To narrow results to a specific record type, click a record type and only records of that type will display to the right.

Click on the Options link to modify the search; either:

- Limit to items I own
- Exact phrase

NOTE: These settings are "sticky". This means the settings remain in effect for all subsequent searches until the option is changed.



Up to five records will display by default within the results for each record type. Click Show More to display up to 25 records. For >25 records, you will have the option to page forward to the Next or Previous 25 records.

Click the ***Pin to Top*** icon to move object search results to the top of the results hierarchy.

HINTS & TIPS

In the left column, hover to see a PIN ICON. Click the pin to move that result category to the top of your list for future searches.

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Chapter Accounts

Accounts are groups of people.

Accounts represent Chapters, Regions, Networks, Forums, YPO Committees, Households, Businesses, Schools, Tradeshows and other external Associations.

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Chapter Account Organization

Account Records have two basic parts: Data Fields and Related Lists

Fields

- **Account Details**
- **Chapter Requirements**

Related Lists

- **ACCOUNT AFFILIATIONS** (Directory of Contacts)
- **Contact Positions** (Officer Administration)
- **Chapter Health** (Quarterly Data/Metrics)
- **Event Associations** (Chapter Sponsor)
- **Leads** (Prospects)
- **Opportunities** (Renewals)
- **Exceptions** (Grace & Waivers)
- **Activities & History**
- **Notes & Attachments**

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ACTIVITY: Access Chapter Account

INSTRUCTIONS: Search your chapter name and select the link to open your chapter Account Record.

1

Using the Global Search Box, type the name of the chapter and press Enter on the keyboard or select the Search button.

HINTS & TIPS

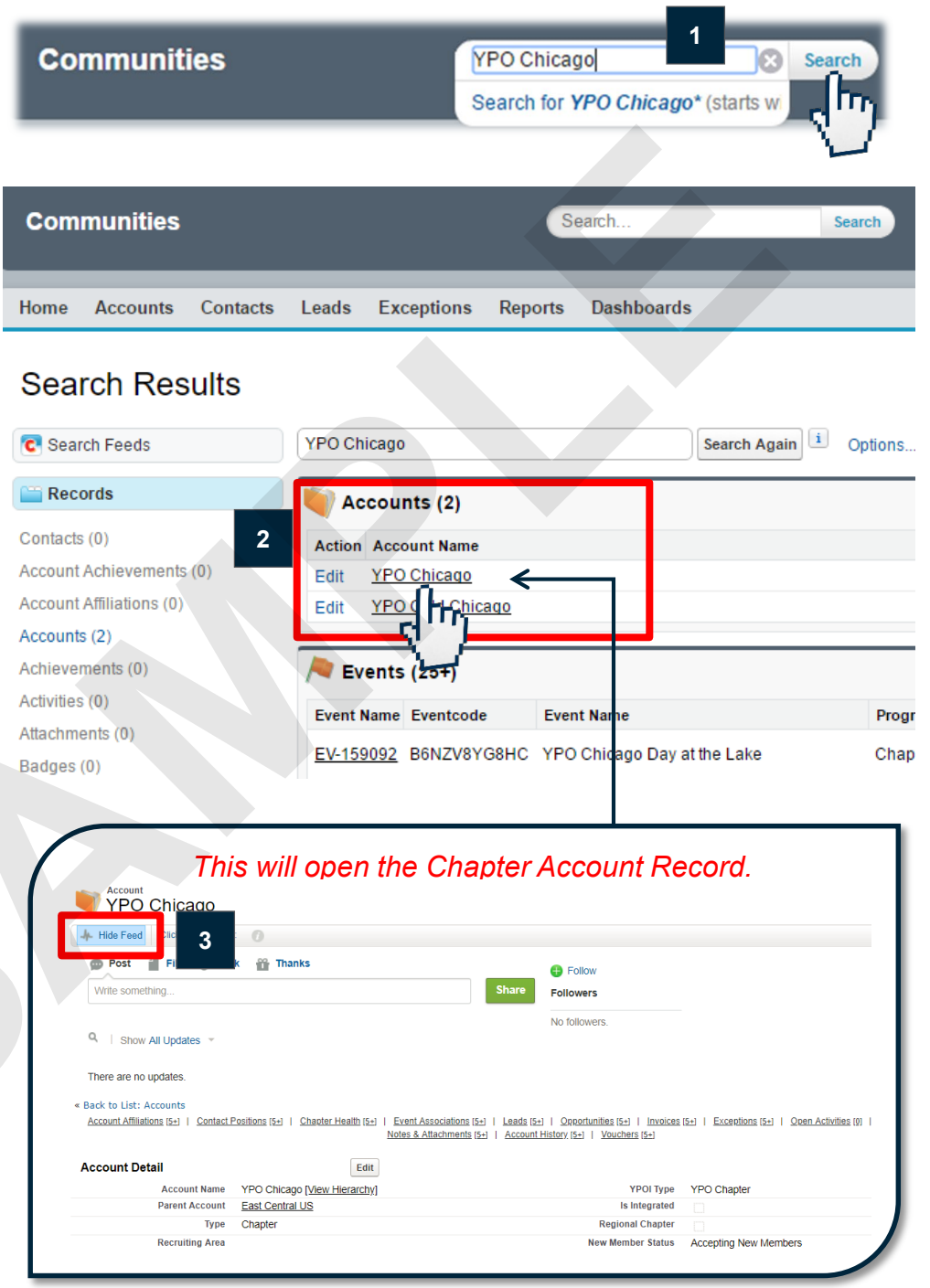
Use the left column to quickly view or link to results by category. Hover and "pin' your most frequent items to the top of the list.

2

In the Search Results page, locate the Accounts section and select the chapter name.

3

Click **Hide Feed** to move the important details to the top of your page!



This activity is for practice

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Chapter Accounts Related Lists

Related Lists are the connections between the two objects in Salesforce.

Account Related Lists contain data residing on other records, yet directly related to the Account being viewed.

Here are the Related Lists that are associated with Account records:

Related List	Purpose
Account Affiliations	Associate Contacts (Members) with a type of Account (Chapter, Network or Committee) using Account Affiliations.
Contact Positions	Links a Contact to Chapter Officers. Positions will be Chapter, Network, Region, Committee or Forum Officers.
Chapter Health	Chapter Health Data records are a quarterly accumulation of information about the Chapter and provide current and historical views into the health of the Chapter. Some information is manually entered by the Chapter and some is automatically calculated..
Chapter Goals	Specific goals set by a chapter.
Event Associations	Events sponsored by a Chapter. This information comes from Cvent.
Leads	Leads are prospective members that YPO may be interested in. Leads can be entered through a YPO Application on YPO.org or manually by a Chapter Administrator or Chapter Membership Officer.
Opportunities	Information about membership renewal, membership qualifications, YPO and Chapter (if applicable) dues and any benefits purchased.
Account Achievements	Awards (achievements) earned by a chapter or network.

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Chapter Account » Leads Related List

The **Leads Related List** stores information about **YPO Prospects** (potential new members) related to a Chapter Account. Membership Development will be able to see all Leads.

- Gold Chapters will not have a Leads Related List.
- YPO Chapters will be able to see only the Leads assigned to their Chapter.

1

From an existing Account record, hover over the Leads Related List or scroll down to the Leads section.

2

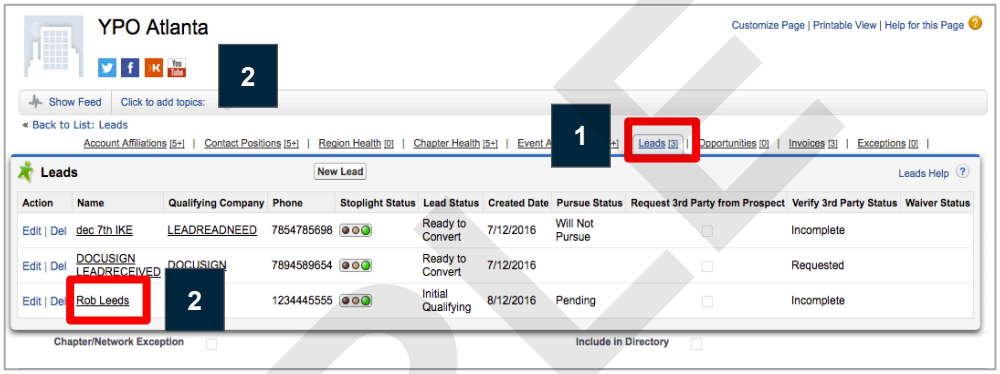
Click the Name ID link of the Prospect you want to view.

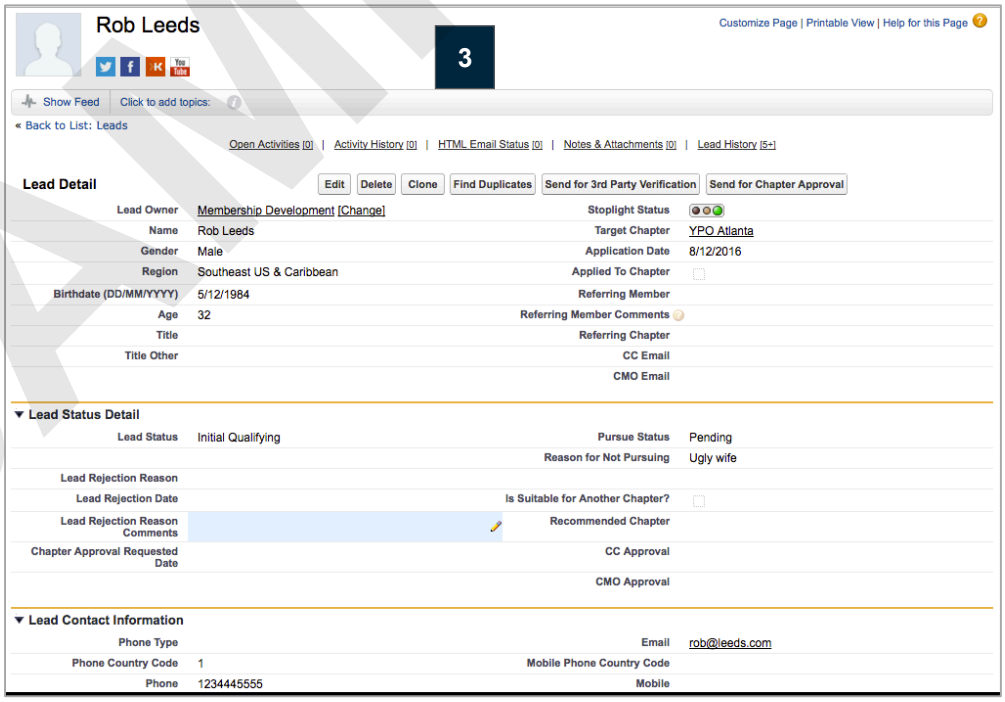
3

The Lead detail displays for the selected Prospect.

Business Process

If a YPO Chapter decides not to pursue a Lead they will no longer display in the Leads Related List.





For more details, see Module 7 on Leads.

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APPENDIX

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YPO - Salesforce Vocabulary

Term	Definition
Account Achievements	Awards (achievements) earned by a Chapter or Network.
Account Affiliations	The link that associates an Account (Chapter, Network, Business, School, etc.) to a Contact (Member, Spouse/Partner, etc.).
Accounts	Accounts are groups of people. They can represent internal (Chapter, Networks, Forums, Committees) or external (Business, School, Tradeshow, Association) groups of people.
Activities	Activities are used to track your interactions with different records (example: Contact or Account). Tasks are to-do items. Log a Call and Email are examples of activities. Completed tasks and activities reside in the Activity History of a record.
*Awards**	Awards are a type of **ACHEIVEMENT** Contact » Contact Achievements Account » Account Achievements
*Champion Roles**	Refer to **CONTACT POSITION**
Chapter Goals	Specific goals set by a chapter and recorded by Management Team Members.
Chapter Health	Chapter Health Data records are related list of quarterly reports inside the chapter Account record. Some information is manually entered by the Chapter and some is automatically calculated.
Chapter	An **ACCOUNT** type
Chatter	Private and secure, Chatter is an internal social network for YPO internal business. Connect with colleagues to collaborate and improve productivity. Chatter gives you the ability to 'follow' Accounts, Contacts, Opportunities, and other Users to stay abreast of activity.
Committee	Committee is an account type in Salesforce and represents international boards and committees. These accounts list the contacts associated with the committee
Contact Achievements	Two types of Contact Achievements: 1.YPO Awards earned by a Contact or 2.Training scheduled or completed by a Contact.
Contact Events	Link between a Contact (Member, etc.) and an Event. Indicates registration and/or attendance at a Chapter or International event. This comes from Cvent.
Contact Positions	The link that associates a Contact (Member, Spouse/Partner, etc.) with a Position (Champion role) inside an Account (Chapter, Network, etc.).
Contacts	Contacts are Members, Children, Spouse/Partners, Management Team or Chapter Administrators in Salesforce. Contact Records contain information about individuals.
Dashboards	Dashboards provide graphical representations of reports for insight into key data, metrics, and trends. They can be acted on in real time.

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*Traditional YPO terminology

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YPO

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