



NAMI Salesforce Glossary

Salesforce CRM was originally created for Business-to-Business (B2B) companies, so sometimes a little translation can be helpful to nonprofits implementing Salesforce. Check out this vocabulary list for some basic definitions and translations.

Account

An Account is a collection of Contact records. For example: NAMI State Organizations, NAMI Affiliates, Organizations, Corporate Partners, Foundations, Households. Each Contact record is associated to at least one Account. For most Contacts, this means they will be associated to a Household account (even if it's a household of one person).

Affiliation

In Salesforce, the term Affiliation means "has a relationship with." Employees are affiliated with their Employer (Organization). Members are affiliated with a NAMI State Organization or NAMI Affiliate. Program Leaders are affiliated Programs they are leading. State/Affiliate staff and volunteers are affiliated with a State/Affiliate.

App

A collection of related functionality in Salesforce. Examples of Apps include Contacts, Accounts, NAMI Board Community, and HelpLine.

Campaign

Campaigns are an event or item that's happening. For example: convention, Advocacy campaigns or a fundraising effort. Opportunities (money coming in) are tracked to campaigns.

Chapter

Chapter is a generic term used to refer to NAMI State Organizations or NAMI Affiliates. We will do our best NOT use the word Chapter when possible, but there are some places in Salesforce for NAMI national where it's necessary.

Contact

Any individual record in Salesforce. This includes members, donors, website users, state/affiliate staff, etc.

Dashboard

A visual representation of your report data. It provides a real-time snapshot of your outcome measurements and key evaluation indicators.

Details Page

This is where primary information is displayed, for example: Email, Address and Phone for a Contact.

GAU

General Accounting Unit. GAUs and GAU Allocations detail how money coming into NAMI is mapped to Accounting codes. These apply to donation, memberships, grants – any money that NAMI is bringing in.

Household

In the Nonprofit Success Pack, the Households group contacts around a physical address, limiting mailings to only one piece per physical address, and aggregating donation and membership information. Every Contact is in a Household, even if they're the only individual in a household.

If an individual in a Household has purchased a Household membership, all Contacts in the Household receive the benefits of that Household membership.

Lead

A lead is a potential "sales" opportunity. When you see "leads," think prospective donors, program participants, members, etc. These are people who might have expressed an interest in your programs, but with whom you have yet to have significant interaction.

Lightning

The latest, greatest version of Salesforce, which NAMI will be using. You may hear about Salesforce Classic, but Classic functionality by and large won't be relevant to us.

Object

An object allows you to store information in your Salesforce.com organization. The object is the overall definition of the type of information you are storing. If you are familiar with Excel, you might think about an object as a worksheet or a table.

Opportunities

Opportunities refer to any items where payment was involved, such as event registration, membership purchases, donations, grants and store purchases. NAMI has different types of opportunities so we can easily look at all of the convention registrations or membership purchases (e.g.).

Payment

Payments allow you to split a donation over a fixed period (a year, for example), and let you track the current and future payment amounts. This is particularly helpful when your donor households and organizations set up a multiple payout schedule for their donations or grants.

All Opportunities save new donations as Payments by default, even single donations (that is, donations paid in a "lump sum"). When you create a new Opportunity and set the Stage field to Posted, Salesforce creates a Payment for the full donation amount and records the donation as "paid in full." If you want, you can override this behavior by selecting the Do Not Automatically Create Payment checkbox when you create the Opportunity.

Payment Transaction

Payment transactions are automatically created from the User Portal and NAMI360 transactions and linked to the Opportunity. Payment Transactions record Authorize.net specific information such as transaction ID and credit card authorization details.

Profile

A profile in Salesforce is a group of settings and permissions assigned to a user. Profiles controls what a user can do in Salesforce.

Program

A NAMI education or advocacy program, such as NAMI Family-to-Family, NAMI Family & Friends, NAMI Family Support Group, NAMI Smarts or Bases y Fundamentos de NAMI.

Program Leader

Someone that leads a NAMI education program, presents a NAMI presentation, runs a NAMI support group or leads trainings for new program leaders. Currently we would refer to program leaders as: mentors, facilitators, teachers, presenters or trainers.

Program Offering

This is a mapping of NAMI programs to a NAMI State or Affiliate. For example, tracking that NAMI Northern Virginia offers NAMI Ending the Silence, NAMI Smarts and NAMI Basics.

Program Session

This is a specific class, presentation or support group meeting. For example, a Program Session might be NAMI Northern Virginia holding a NAMI Ending the Silence Presentation on May 4th, 2018 at 6 pm at the Arlington Public Library.

Related Lists

This page lists related or affiliated information for an object. For example, on the Related page for a Contact, you would see State/Affiliate associations, Opportunities, Notes, etc. You can think of Related lists as "Additional Information."

Stages

The stage describes where you are in the solicitation process. When entering an opportunity, you need to pick which stage that opportunity is in. Stages have probabilities associated with them. When you change the Stage to "Posted," the Probability (%) field automatically updates to 100. You can also manually adjust the Probability if desired. Stages are associated with an Opportunity Status frequently used in reports.