



# RESOURCES IN SALESFORCE

## Process Overview

1. NAZ participant meets requirements for resource (i.e. enrolling in Family Coaching, completing College Bound Commitment, graduating from a Family Academy course, completing Family Academy reading, participating in a focus group, etc).
  - o To view all resource types & amounts, click [here](#).
2. NAZ Coach or Facilitator confirms/updates email or mailing address (depending on the resource delivery method) of the participant eligible for a resource.
3. NAZ Coach or Facilitator [creates a new resource](#) on the participant's record & fills out all required fields.
4. NAZ Coach or Facilitator submits the resources request for manager approval.
5. NAZ participant resource record is locked & the resource requestee's manager is notified that there is a resource that "Needs to be Sent."
6. Manager opens NAZ participant record & approves the request.
  - o If the resource requested is not approved, the manager can:
    - i. Deny the record & request, sending it back to the requestee.
    - ii. Change the resource amount & approve the request after the amount has been updated.
7. Salesforce notifies the Finance & Operations Team of the approved Resource.
8. Finance & Operations sends/distributes the resource.
9. Finance & Operations updates the Resource status to "Sent" & Salesforce auto populates the "Date Distributed" field on the record.
10. NAZ Coach or Facilitator is notified of the Resource distribution.

## Resources in Salesforce (How To)

### NAZ Coach/Facilitator: How to Request a Resource

1. Type in the participants name or ID number in the top search bar.
2. Select the search result that loads automatically with the **Purple** Contact icon that appears to open their Contact page.
3. Click on the Related tab.

The screenshot shows a Salesforce Contact record for "Darth Vader Test". The record includes fields for Full Name, Legal Name, Birthdate, Business Phone, Email, and Mailing Address. The Mailing Address is 260 Page Street East, Saint Paul, MN 55107, United States. The Account Name is Test Household. At the bottom, there is a navigation bar with tabs: Program Engagements, Details, Case Plans, Tasks, Files, and Related. The Related tab is highlighted with a red arrow.



4. Scroll down to the Resources list and select the “New” button.

Resources (3)		New
Resources Name		
<a href="#">Darth Vader Test - Speaking Engagement/Communications Gift Card</a>		▼
<a href="#">Darth Vader Test - Family Academy Technology</a>		▼
<a href="#">Darth Vader Test - FA - CBB Attendance Incentive</a>		▼
<a href="#">View All</a>		

5. Complete the required fields. Remember that the name autofills, so you do not need to put full information in there.
  - Delivery Method: Personal Delivery (distributed in person), Mail, Electronic
    - ★ Before submitting a resource request, the requester is responsible for confirming & updating the necessary contact information.
      - Electronic Delivery: Requester confirms the participant’s email address is correct & entered in Salesforce.
      - Mail Delivery: Requester confirms the participant’s residential/ mailing address is correct & entered in Salesforce.
  - Status: **Needs to Be Sent**
  - Resource Amount: The monetary value of the resource (i.e. 25 for a \$25 gift card, 1 for Family Academy Parent Toolkit)
  - Strategy: The Ecosystem Area (i.e. Family Achievement, Family Academy, etc.)
  - Resource Category: Gift Card, Check, Technology, Other, Food, Housing
  - Resource Type: The resource name (i.e. Family Referral, Enrollment - CBC, etc.)
  - Date Distributed: **Leave this field blank! Finance will update it when the resource has been received.**
  - Note: Additional notes about the resource, resource request, etc.
6. Select the [navy](#) Save button.
7. Click on the added resource name.
8. Review the information & select the “Submit for Approval” button in the top left corner of the resource information page.

### NAZ Manager: How to Approve a Resource

1. Receive email & notification from the system that a resource has been requested.
2. Click on the notification link received, this will take you to a new page with the request information.
3. Review the requested resource.
  - ★ Approver is accountable for ensuring the request is complete and valid per the guidelines and that any in-person deliveries are completed.
4. Approve, Deny, or Reassign the resource request to another manager by selecting the corresponding button.
  - If the resource requested is not approved, the manager can:
    - i. Deny the request, sending a message to the requestee.



- ii. Update the resource request, by clicking on the resource name & selecting the pencil icon next to the field you wish to update. Then, approve the updated request.

### **NAZ Finance Team: How to Update a Distributed Resource**

1. Receive notification from the system that a resource has been requested.
2. Type in the participants name or ID number in the top search bar.
3. Select the search result that loads automatically with the Purple Contact icon that appears to open their Contact page.
4. Click on the “Related” tab on the participant’s contact page.
5. Scroll down to “Resources”
6. Click on the name of the resource requested.
7. Review the approved resource request.
8. Distribute the resource.
9. Select the pencil icon next to the “Status” field.
10. Update the resource status to “Sent.”
11. Add the gift card number/order or technology tracking number.
12. Click on the [navy](#) Save button at the bottom of the page.

Note: The date-distributed field will auto-populate when you update the resource status to “Sent.”

## Special Circumstances

### **One Off Events with Resource Incentives**

There are a number of NAZ events with gift card incentives. Often, these gift cards are casually distributed at the event to attendees & therefore require different tracking processes.

#### How to request gift cards for event distribution:

1. Email [Doug Olson](#) & Cc your supervisor with event information at least five business days prior to the event (i.e. the name of the event, the date of the event, the number & value of gift cards requested).
2. Supervisor replies to the email, approving the request.
3. [Doug Olson](#) provides you with the requested gift cards prior to the event in addition to a tracking template.

#### During the Event

1. Collect gift card recipient information (i.e. first name, last name, email address, distribution date).
2. Reconcile gift cards at the end of the event (i.e. make sure all gift cards were distributed or organized to be returned to [Doug Olson](#) )



### How to enter one off gift cards in the LINK:

1. Type in the participants name or ID number in the top search bar.
2. Select the search result that loads automatically with the Purple Contact icon that appears to open their Contact page.
3. Click on the Related tab.

Contact  
**Darth Vader Test**

Full Name: **Darth Vader Test**

Legal Name

Birthdate

Business Phone

Email

Account Name: **Test Household**

Mailing Address  
260 Page Street East  
Saint Paul, MN 55107  
United States

Program Engagements Details Case Plans Tasks Files **Related**

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Resources (3)

Resources Name

- Darth Vader Test - Speaking Engagement/Communications Gift Card
- Darth Vader Test - Family Academy Technology
- Darth Vader Test - FA - CBB Attendance Incentive

View All

New

5. Complete the required fields. Remember that the name autofills, so you do not need to put full information in there.
  - o Delivery Method: **Personal Delivery** (distributed in person)
  - o Status: **Sent**
  - o Resource Amount: The monetary value of the resource (i.e. 25 for a \$25 gift card, 1 for Family Academy Parent Toolkit)
  - o Strategy: The Ecosystem Area (i.e. Community, Parent Leadership etc.)
  - o Resource Category: **Gift Card**
  - o Resource Type: The resource name (i.e. Event Participant, Workshop/Event etc.)
  - o Date Distributed: **The date of the event.**
  - o Note: Additional notes about the resource, resource request, etc.
6. Select the navy Save button.

### Distributed Resources without Record

The broader Northside Community is invited to most NAZ events & are eligible to receive resource incentives. This means that not all resource recipients will have records in the database. If you are unable to find an individual in Salesforce while entering resource data after an event, please contact [Bill Bugert](#) & Ellie Sanford or email [datasupport@the-naz.org](mailto:datasupport@the-naz.org) to request the record be created.