



Salesforce Terminology

for Former NAZ Connect Users

NAZ Connect Term	Definition		Salesforce Term	Salesforce Definition	Similarities/ Differences
View	A specific type of page on a participant's record (i.e. <i>Goals/Notes</i>)	➤	Object	A word that describes the various pages available to you in Salesforce (i.e. Contact, Account)	Unlike views in NAZ Connect, in Salesforce you can navigate to any Object without first searching for a participant.
Tabs	Various different pages within a participant record (i.e. ExL, Leader Participation, School Placement, etc.)	➤	Fields	Smaller boxes on Object pages that contain participant information such as school placement, birthdate, Family Academy Graduation, etc.	Fields are more general than tabs in NAZ Connect. However, they both have various means of inputting information (i.e. free text, drop down pick list)
Record	Where all data is tracked & stored regarding NAZ participants' interactions with & enrollment in NAZ programs.	➤	Contact	The central hub to view & update participant information. Additionally, this page hold all relevant notes, visits, goals, and program enrollment regarding the participant.	Similar to NAZ Connect, any interaction with a participant will be tracked in connection with and through the Contact object.



Lead Staff	The coach currently working with a NAZ Family.	➤	Contact Owner	The coach currently working with a NAZ Family.	This field is exactly the same. The only exception being, previous coaches working with a family are listed on the "Related" Contact object tab & under " History. "
Household	A means of linking all NAZ participants records together to display family structure and group them together.	➤	Account	A means of linking all NAZ participants records together to display family structure and group them together.	Unlike in NAZ Connect, there are also Account Pages for Anchor Sites, Partners, & other organizations in the NAZ Ecosystem. The Account object is very similar to the Contact object but its main purpose is to group & organize NAZ participants.
Strategy Participation	A box at the top of each participant's record that displays the ways in which that individual is engaged with NAZ.	➤	Program Engagement	The various different programs offered by NAZ and Partner organizations that a participant is enrolled in.	Program engagements do not include "Anchor School" or "EC Anchor Site." Rather, Program Engagements are a combination of "Leadership" and "ExL Placement" tabs with some boxes formerly seen in the Strategy Participation widget (i.e. Family Coaching, Coaching Recruitment, Scholar Coaching).



Goals & Goal Plans	Various commitments a family or participant makes to support their success.	➤	Case Plan	Similar to a Goal Plan, Case Plans outline one specific outcome and have a picklist of smaller Action Items that will help to support a participants' success in attaining the desired outcome.	Unlike NAZ Connect, all goals in Salesforce are a part of a Case Plan. There are no stand alone goals. Additionally, the small goals within Case Plans are called Action Items.
Goal Steps	Action items a family or participant commits to in order to make progress in achieving their larger goal.	➤	Goal	Action items a family or participant commits to in order to make progress in achieving their Case Plan.	These fields are exactly the same, different only in name.
Activity	Activities are the visits, interactions, and engagements one has had with their families. Additionally, this is how time is tracked.	➤	Activity	Logging an Activity allows you to track the time you spend engaging with NAZ Families.	These fields are exactly the same!
Notes	Connected most often to Goals & Goal Plans, this field tracks action items & meeting highlights after engaging with a family.	➤	Notes	This field tracks action items, meeting highlights, & updates after engaging with a NAZ Family. Notes in Salesforce should summarize the entire interaction you have with a family or participant.	These fields are the same, however, the Notes field in Salesforce will be tracked through the "Log An Activity" button.



Resources/ Visits Tab	The Resource/Visits Tab displays the resources received by a family as well as the visits a coach has logged to track their interactions with a family.	➤	Tasks	The Tasks view shows all Visits a coach has logged with their families & any corresponding notes.	Unlike in NAZ Connect, the Task view does not display resources a family has received. To view resources, go to the "Related" tab on a participant's Contact object & scroll to History.
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