



SALESFORCE TERMINOLOGY

Salesforce Term	Salesforce Definition
Object	A word that describes the various pages available to you in Salesforce (i.e. Contact, Account)
Fields	Smaller boxes on Object pages that contain participant information such as school placement, birthdate, Family Academy Graduation, etc.
Contact	The central hub to view & update participant information. Additionally, this page holds all relevant notes, visits, goals, and program enrollment regarding the participant.
Contact Owner	The coach currently working with a NAZ Family.
Account	A means of linking records together to display structure and organize NAZ participants. There are various different types of Account Pages including Households, Organizations, Anchor Schools.
Program Engagement	The various different programs offered by NAZ and Partner organizations that a participant is enrolled in.
Case Plan	Case Plans outline one specific outcome and have a picklist of smaller goals that will help to support a participants' success in attaining the desired outcome.



Goal	Action items a family or participant commits to in order to make progress in achieving their Case Plan.
Activity	Logging an Activity allows you to track the time spent engaging with NAZ Families & take notes.
Notes	This field tracks action items, meeting highlights, & updates after engaging with a NAZ Family. Notes are entered through the “Log an Activity” function & should summarize the entire interaction you have with a family or participant.
Tasks	The Tasks view shows all Visits a coach has logged with their families & any corresponding notes.