

Coffee Chat Nuggets July 20, 2022

Theme: General discussion

### \*\*\*Sales Force\*\*\*

Training for Sales Force is called Trail Head and accessed through Linked In. Trail Head CRM fundamentals. DDAR IS training resources one drive has listing of trainings.

<https://pennstateoffice365.sharepoint.com/:f:/r/sites/DDARISTrainingResources/Shared%20Documents/Salesforce?csf=1&web=1&e=8eMf6t>

Message was posted on Launchpad, June 22:

<https://sites.psu.edu/ddarlaunchpad/2022/06/22/enterprise-crm-update-june-2022/>

It's time to get started learning some Salesforce functionality. Some of you have already started, which is great! We are getting closer to starting the implementation and anything you learn upfront, will help the learning curve. Below is listed the initial recommended Salesforce training for the IS team... as you get started you will find that there are many training trails that you can go down. Try to stay focused and go thru all the Beginning trainings initially, so that you have a basic knowledge. Once we all know what our roles will be, then more advanced trainings can happen for everyone.

<https://trailhead.salesforce.com/today> - create trailhead account through this site.

Once the account is created, search for these trainings:

- Get Started with Trailhead
- Learn CRM Fundamentals for Lightning Experience
- Learn to Work in Lightning Experience
- Admin Beginner
- Developer Beginner
- Reports and Dashboards for Lightning Experience

### \*\*\*New GRT forms\*\*\*

To find new GRT go to GURU click on forms, go to all forms type in gift reporting

<https://guru.psu.edu/forms/gift-reporting-and-transmittal-form-SIMBA.pdf?logged=true>

### \*\*\*Shop on Lion short cuts\*\*\*

Shared by Jen Shutt

At create shopping cart, go into page default setting: set values

Product category find 44120000 office supplies. this is an example

[www.purchasing.psu.edu](http://www.purchasing.psu.edu) search here for product category codes, use select all find, start typing what you are looking for and it should take you to the product code  
Rebecca Fike from purchasing office is super helpful

Tabs across top you can prefill with your office specific details so that you don't have to complete it for each item that you order. Do these steps prior to selecting items for the order. This avoids having to enter information for each line item.

\*\*\*\*Todd Cardemon replaces Dan Hansel in IT support

## ENTERPRISE CRM UPDATE – JUNE 2022

Jun 22, 2022

*A message from Alan Gibson:*

Dear DDAR colleagues, over the last few months I had the opportunity to meet with most of you regarding the upcoming changes to our CRM (Constituent Relationship Management) system from Ellucian Advance to Salesforce & Affinaquest. I wanted to provide a brief update to the status of the RFP process and follow with some resources that are available to you should you have an interest in getting a head start in some of the Salesforce fundamentals. We officially signed agreements with Salesforce at the end of May and are currently working through the signature process with our Advancement partner, Affinaquest, and our implementation & strategy partner in Huron. Over the coming weeks we will begin the initial phase of our transformation with a focus on discovery and planning efforts that will chart the path for our successful transformation from Ellucian Advance to a Salesforce ecosystem. As this continues to progress, I will be providing further communication around how, when, and where you can participate in the transformation efforts. This will take all of us as a division to successfully transform and optimize our technology experiences as it relates to the amazing work we all do.

Working with our colleagues in Information Systems, and a big call out to Amy Grattan, we have put together some preliminary “get your hands dirty” training to those of you that would like to get a jump start into the new system framework. I recommend starting and completing these identified training trails before exploring any other areas within the training platform that Salesforce provides. Should you complete these trails and have an interest in additional recommendations, please contact either Alan Gibson ([alangibson@psu.edu](mailto:alangibson@psu.edu)) or Amy Grattan ([abg3@psu.edu](mailto:abg3@psu.edu)) and we are happy to guide you.

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Get Started Learning Salesforce – Recommended Resources:

A new [Salesforce folder](#) was added to our [DDAR Information Systems Training Resources site](#). In here you'll find links to resources to help you get started on your Salesforce learning journey, including links to LinkedInLearning courses and Salesforce Trailheads. Some of these resources are relevant for all and some are relevant for a select few “super users” that need more advanced/specialized knowledge and skills. *Keep in mind that these courses and trailheads use standard Salesforce terminology, and our new Advancement CRM solution will use slightly different terminology.* To help you get used to these new terms, we've uploaded an [Affinaquest Terminology](#) document. You can reference this “cheat sheet” when you are going through the recommended courses and/or trailheads.

Good Luck on your learning journey and if you find resources that you believe your colleagues would find helpful, please share these and I can add them to our new Salesforce folder.

If you have questions about the new CRM and what's to come, or if you have general technology, process, or data questions, please do not hesitate to contact me or schedule time with me individually through my [calendar link](#).

Alan Gibson  
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# Affinaquest Terminology

Tables are called "Objects" in Salesforce (e.g., Opportunities, Accounts, Contacts, etc.). Tabs users see across the top, coincide with their table-level access.

Affinaquest Term	AWA Term and/or Affinaquest Definition
Accounts	Households, or Corporate Hierarchies, Organizations, Corporations. An Account can consist of one or more Contacts
Affiliations	Organizations the Constituent is affiliated with, including Employers
Campaign	Marketing Appeals
Capital Campaigns	Fundraising Campaigns
Channels	Contact methods (phone, emails, social media, etc.)
Chatter	New in Affinaquest - An internal messaging system, to communicate with other users/colleagues and you can follow others
Constituent	Entities in AWA
Contacts	Persons/individuals ("person entities" in AWA)
Designation	Allocation
Dues	Memberships
Gift/Pledge	In Affinaquest, a gift/pledge can be made up of multiple "transactions". Transactions can consist of Multiple Donors, or Multiple Allocations
Objects	Salesforce Tables (such as Opportunities, Accounts, Contacts, etc.)
Opportunities	Proposals in AWA. Major Giving Opportunities.

Record-level access is determined by Roles.

The screenshot shows a SharePoint page for 'DDAR IS Training Resources'. The page has a search bar at the top right and a navigation menu on the left. Below the site title, there are options to share, copy link, download, add shortcut to OneDrive, export, automate, and integrate. The main content area shows a list of files under the 'Salesforce' folder. The list has columns for Name, Modified, and Modified By.

Name	Modified	Modified By
LinkedInLearning courses	June 14	Giallan, Amy Beth
Salesforce Trailheads	June 14	Grottan, Amy Beth
Affinaquest Terminology.docx	June 14	Grottan, Amy Beth

<https://pennstateoffice365.sharepoint.com/sites/DDARISTrainingResources/Shared%20Documents/Forms/AllItems.aspx?csf=1&web=1&e=ZZJugN&cid=f2283a14%2D35b1%2D4527%2Daa15%2D0919af5442b3&RootFolder=%2Fsites%2FDDARISTrainingResources%2FShared%20Documents%2FSalesforce&FolderCTID=0x012004610AE524D34B44981B27D53A0F58886>