AMERICORPS

Adriana has worked just over 2 years with Habitat! 🙌🏽

2019

2022

Kelly has worked
almost
7 years with Habitat!

Organization of Salesforce:

- Objects are accessed through the navigation menu, similar to tabs in an excel sheet: Accounts, Opportunities, Contacts, Dashboards, Shift Calendar, Volunteer Jobs, etc.

- Select any record to learn more about an Account, Contact, Opportunity, Closing Date, Amount, etc. in Salesforce.
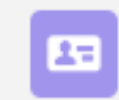
Volunteer Management:

- Track the volunteers who come out to work with your affiliate (build site, ReStore, events, etc.)

- Page layouts where you can create campaigns, volunteer jobs, and shifts.

- This information is indispensable when creating board reports, appeal letters, and having an idea of the impact your affiliate is making in your community!

Search...

Volunteers Help   Home   Chatter   Tasks ⌄   Volunteers Wizard   Volunteer Jobs ⌄   Shift Calendar   Find Volunteers   Contacts ⌄   More ⌄

Contacts
Recently Viewed ⌄

New   Import   Add to Campaign   Send List Email   Merge Contacts

131 items • Updated a minute ago

Search this list...

	Name ●	Primary Affiliation ●	Account Name ●	Phone	Primary Email ●	Mailing City	Mai...	Owner Last Name ●
67		Home Depot				Maumee	OH	
68						Toledo	OH	
69		Home Depot				Taylor	Michigan	
70		Home Depot				Detroit	MI	
71		Home Depot				Wayne	MI	
72		Home Depot				Detroit	MI	
73		DTE Energy				Newport	Michigan	
74		DTE Energy				Newport	Michigan	
75						Ypsilanti	MI	
76		DTE Energy				Trenton	MI	
77		DTE Energy				Monroe	MI	
78		DTE Energy				Detroit	MI	
79		Regular Volunteer				Dundee	MI	
80		DTE Energy				Woodhaven	Michigan	
81						Marina	MI	
82		La-Z-Boy, Inc.				Monroe	Michigan	
83								

Contacts

Recent Items   Notes

Sandbox: AIM2022

Volunteer Manage...   Volunteers Help   Home   Chatter   Tasks ⌄   Volunteers Wizard   Volunteer Jobs ⌄   Shift Calendar   Find Volunteers   Campaigns ⌄   More ⌄

Campaigns
Recently Viewed ⌄ 📌

New

3 items • Updated a few seconds ago

🔍 Search this list...

	Campaign Name ⌄	Owner Last Name ⌄	Start Date ⌄	Status ⌄	Active ⌄	
1	2022 Volunteers	Laura (Monroe)	1/1/2022	In Progress	☑	⌄
2	Volunteers	Laura (Monroe)	1/1/2019	Planning	☐	⌄
3	Cars for Homes	Cafek (Oakland)		In Progress	☑	⌄

How to create a Campaign

New Campaign

Select a record type

- ○ Fund Campaign
  This is used for all fundraising campaigns.

- ○ Contact Group
  This is used to group contacts for communication purposes

- ○ Council Meeting
  Used for managing Leadership and Topic Council Meeting

- ○ Event Campaign
  This is used for all events where donations are collected.

- ● Volunteer Campaign
  A campaign specifically used to track Volunteers

- ○ iContact Email Campaign
  Used for all mass email marketing lists and email sends.

Choose Campaign type

Cancel   Next

teer Manage...   Volunteers Help   Home   Chatter   Tasks   Volunteers Wizard   Volunteer Jobs   Shift Calendar   Find Volunteers   Campaigns   More

igns
ntly Viewed

ted a few seconds ago

aign Name   Active

Volunteers

teers

for Homes

New Campaign: Volunteer Campaign

Campaign Information

Campaign Owner
Adriana Laura (Monroe)

Campaign Record Type
Volunteer Campaign

* Campaign Name

Parent Campaign

Search Campaigns...

Status
Planning

Active
☐

Type
--None--

Denote important information & save

Additional Information

Num Sent in Campaign

0

Start Date

Go to your newly created campaign's Related tab

New Volunteer Job

Information

* Volunteer Job Name

[   ]

* Campaign

[Search Campaigns...   🔍]

Ongoing
☐

Inactive ⓘ
☐

Skills Needed ⓘ

Available   Chosen

Carpentry	▶	
Electrical		
Plumbing	◀	
Painting		
Manual Labor		
Landscaping		
Computer Use		
Organizer		

Cancel   Save & New   Save

Volunteer Manage...   Volu...   paigns ⌄   More ⌄

Volunteer Jobs
Recently Viewed ⌄ 📌

2 items • Updated a few seconds ago

New   Impo

	Volunteer Job Name	scription
1	☐ 845 Ashdale Ln	
2	☐ Project Serve Veteran Ramps	

Volunteer Manage...

Volunteer Jobs
Recently Viewed ▾

2 items • Updated a few seconds ago

	Volunteer Job Name
1	845 Ashdale Ln
2	Project Serve Veteran Ramps

New

Skills Needed ⓘ

Available

Carpentry
Electrical
Plumbing
Painting
Manual Labor
Landscaping
Computer Use
Organizer
Cashier
Community Outreach

Chosen

▶

◀

Location

Location Street

Location State/Province

Location City

Location Zip/Postal Code

Cancel   Save & New   **Save**

Description

Volunteer Manage...   Vol...   paigns   More

Volunteer Jobs
Recently Viewed

2 items • Updated a few seconds ago

New   Impor

	Volunteer Job Name		scription
1	845 Ashdale Ln		
2	Project Serve Veteran Ramps		

Location

Location Street

Location State/Province

Location City

Location Zip/Postal Code

Description

Location Information ⓘ

Salesforce Sans   12   B I U S̶   ☰ ☰ ☰ ☰   ☰ ☰ ☰   🔗 🖼

T×

Sample:

**Come help build our 110th Habitat home located at 845 Ashdale Ln.
Contact our Volunteer Services Coordinator, Adriana, at intern@habitatmonroemi.org
for any additional information.**

Description

Salesforce Sans   12   B I U S̶   ☰ ☰ ☰ ☰   ☰ ☰ ☰   🔗 🖼

T×

Cancel   Save & New   Save

Recent Items   Notes

Volunteer Manage...

Volu... paigns More

Description

Location Information ⓘ

Salesforce Sans | 12 | B I U S̶

Tₓ

Come help build our 110th Habitat home located at 845 Ashdale Ln.
Contact our Volunteer Services Coordinator, Adriana, at intern@habitatmonroemi.org
for any additional information.

Description

Salesforce Sans | 12 | B I U S̶

Tₓ

Volunteer Jobs
Recently Viewed

2 items • Updated a few seconds ago

	Volunteer Job Name
1	845 Ashdale Ln
2	Project Serve Veteran Ramps

New

...cription

Denote important information
& save

System Information

Display on Website ⓘ

Volunteer Website Time Zone ⓘ

--None--

Cancel | Save & New | Save

New Volunteer Shift

Information

ShiftID

Desired # of Volunteers

* Volunteer Job

845 Ashdale Ln

Start Date & Time

* Date

* Time

* Duration (Hours)

Description

System Fields - DO NOT EDIT

Total Volunteers

Job Recurrence Schedule

Search Job Recurrence Schedules...

Cancel   Save & New   Save

Volunteer Manage...

Volunteer Job
845 Ashdale Ln

Campaign
2022 Volunteers

Number of Volun...
0

Volunteer Hours (0)

Volunteer Shifts (3+)

Shift-19103
Start Date & Ti...   1/1/2022 8:00 AM
Duration (Hours):   7.00
Total Volunteers:

Shift-19104
Start Date & Ti...   1/4/2022 8:00 AM
Duration (Hours):   7.00
Total Volunteers:

Shift-19105
Start Date & Ti...   1/6/2022 8:00 AM
Duration (Hours):   7.00
Total Volunteers:

View All

er Roster   Mass Email Volu

Denote important information & save

Q Search...

Volunteer Manage... Volunteers Help Home Chatter Tasks ∨ Volunteers Wizard Volunteer Jobs ∨ Shift Calendar Find Volunteers More ∨

Volunteer Jobs > 845 Ashdale Ln
Volunteer Shifts

Pay attention to the ShiftID

50+ items • Sorted by Start Date & Time • Updated a few seconds ago

	ShiftID ∨	Start Date & Time ↑ ∨	Duration (Hours) ∨	Total Volunteers ∨	Desired # of Volunteers ∨	# of Volunteers Still Ne...
1	Shift-19103	1/1/2022 8:00 AM	7.00		10	10
2	Shift-19104	1/4/2022 8:00 AM	7.00		10	10
3	Shift-19105	1/6/2022 8:00 AM	7.00		10	10
4	Shift-19106	1/8/2022 8:00 AM	7.00		10	10
5	Shift-19107	1/11/2022 8:00 AM	7.00		10	10
6	Shift-19108	1/13/2022 8:00 AM	7.00		10	10
7	Shift-19109	1/15/2022 8:00 AM	7.00		10	10
8	Shift-19110	1/18/2022 8:00 AM	7.00		10	10
9	Shift-19111	1/20/2022 8:00 AM	7.00		10	10
10	Shift-19112	1/22/2022 8:00 AM	7.00		10	10
11	Shift-19113	1/25/2022 8:00 AM	7.00		10	10
12	Shift-19114	1/27/2022 8:00 AM	7.00		10	10
13	Shift-19115	1/29/2022 8:00 AM	7.00		10	10
14	Shift-19116	2/1/2022 8:00 AM	7.00		10	10
15	Shift-19117	2/3/2022 8:00 AM	7.00		10	10

Volunteers Shift Calendar

Printable View

This shift calendar can be visible on Salesforce and your website.

Volunteers can manually select a date and sign up!

Campaign (All Active Volunteer Campaigns)

Volunteer Job (All Jobs)

July 2022

today ◄ ►

month | week | day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28 8a 845 Ashdale Ln	29	30 8a 845 Ashdale Ln	1	2 8a 845 Ashdale Ln
3	4	5 8a 845 Ashdale Ln	6	7 8a 845 Ashdale Ln	8	9 8a 845 Ashdale Ln
10	11	12 8a 845 Ashdale Ln	13	14 8a 845 Ashdale Ln	15	16 8a 845 Ashdale Ln
17	18	19 8a 845 Ashdale Ln	20	21 8a 845 Ashdale Ln	22	23 8a 845 Ashdale Ln

⚡ Recent Items   📑 Notes

Habitat for Humanity®
of Monroe County

HOMEOWNERSHIP   RESTORE   VOLUNTEER   DONATE   VETERANS

give a day. change a life.

Join our community of volunteers to build a home.

REGISTER TO VOLUNTEER   VOLUNTEER CALENDAR

Example:

October 2022

today ◄ ►

month | week | day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27 **8a** Grand Blvd (full)	28	29 **8a** Grand Blvd (full)	30	**8a** Grand Blvd (full)
2	3	4 **8a** Grand Blvd (full)	5	6 **8a** Grand Blvd (full)	7	**8a** Grand Blvd (full)
9	10	11 **8a** Grand Blvd (full)	12	13	14	1
16	17 **8a** Grand Blvd (full)	18	19 **8a** Grand Blvd	20	21	2
23	24	25 **8a** Grand Blvd	26	27 **8a** Grand Blvd	28	2 **8a** Grand Blvd
30	31	1	2	3	4	

closed ↘

available ↘

Grand Blvd

2489 Grand Boulevard

full	Monday 10/17/2022 8:00 AM - 3:00 PM	confirmed: 0 - available: 0	Help us build our #107th Habitat home at 2489 Grand Blvd! *Email sjennings@habitatmonroemi.org if you have any questions.
sign up	Wednesday 10/19/2022 8:00 AM - 3:00 PM	confirmed: 0 - available: 6	Help us build our #107th Habitat home at 2489 Grand Blvd! *Email sjennings@habitatmonroemi.org if you have any questions.
sign up	Tuesday 10/25/2022 8:00 AM - 3:00 PM	confirmed: 1 - available: 5	Help us build our #107th Habitat home at 2489 Grand Blvd! *Email sjennings@habitatmonroemi.org if you have any questions.
sign up	Thursday 10/27/2022 8:00 AM - 3:00 PM	confirmed: 3 - available: 3	Help us build our #107th Habitat home at 2489 Grand Blvd! *Email sjennings@habitatmonroemi.org if you have any questions.
sign up	Saturday 10/29/2022 8:00 AM - 3:00 PM	confirmed: 0 - available: 6	Help us build our #107th Habitat home at 2489 Grand Blvd! *Email sjennings@habitatmonroemi.org if you have any questions.

Volunteers can easily choose what day works for them!

Grand Blvd

2489 Grand Boulevard

full Monday 10/17/2022 8:00 AM - 3:00 PM   confirmed: 0 - available

sign up Wednesday 10/19/2022 8:00 AM - 3:00 PM   confirmed: 0 - available

sign up Tuesday 10/25/2022 8:00 AM - 3:00 PM   confirmed: 1 - available

sign up Thursday 10/27/2022 8:00 AM - 3:00 PM   confirmed: 3 - available

sign up Saturday 10/29/2022 8:00 AM - 3:00 PM   confirmed: 0 - available

Volunteer Sign Up

First Name*

Last Name*

Primary Email*

Business Phone

Home Phone

Volunteer Organization

Mailing State/Province

Mailing Zip/Postal Code

Title

Number of Volunteers* 1

Grand Blvd
Wednesday 10/19/2022 8:00 AM - 3:00 PM

Sign Up   Cancel

Reports
Recent

Search recent reports...   New Report   New Report (Salesforce Classic)   New Folder

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Administrative Reports

File and Content Reports

Other Reports

Select a Report Type

Search Report Types...

Recently Used Report Types

Report Type Name	Category
Accounts with Opportunities	Custom
Accounts with Donations (custom)	Custom

How to create a Volunteer Report!

Volunteers Help   Home   Chatter   Tasks ⌄   Volunteers Wizard   Volunteer Jobs ⌄   Shift Calendar   Find Volunteers   Reports ⌄   More ⌄

✕

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Administrative Reports

File and Content Reports

Other Reports

Select a Report Type

🔍 volunteer   ⊗

Report Type Name	Category	
Contacts with Volunteer Hours and Volunteer Jobs	Standard	⌄
Contacts with Volunteer Recurrence Schedules	Standard	⌄
Contacts with Volunteer Recurrence Schedules and Volunteer Job	Standard	⌄
Contacts with Volunteer Waivers	Standard	⌄
Accounts with Volunteer Hours (custom for HFHM)	Custom	⌄
Accounts with Volunteer Hours	Custom	⌄
Campaigns with Volunteer Jobs	Standard	⌄
Campaigns with Volunteer Jobs and Volunteer Hours	Custom	⌄
Activities with Volunteer Hours	Standard	⌄
Activities with Volunteer Jobs	Standard	⌄
Activities with Volunteer Shifts	Standard	⌄
Activities with Volunteer Waivers	Standard	⌄

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Administrative Reports

File and Content Reports

Other Reports

Select a Report Type

🔍 volunteer   ✕

Report Type Name	Category	
Contacts with Volunteer Hours and Volunteer Jobs	Standard	▾
Contacts with Volunteer Recurrence Schedules	Standard	▾
Contacts with Volunteer Recurrence Schedules and Volunteer J...	Standard	▾
Contacts with Volunteer Waivers	Standard	▾
Accounts with Volunteer Hours (custom for HFHM)	Custom	▾
Accounts with Volunteer Hours	Custom	▾
Campaigns with Volunteer Jobs	Standard	▾
Campaigns with Volunteer Jobs and Volunteer Hours	Custom	▾
Activities with Volunteer Hours	Standard	▾
Activities with Volunteer Jobs	Standard	▾
Activities with Volunteer Shifts	Standard	▾
Activities with Volunteer Waivers	Standard	▾

Details   ✕

Contacts with Volunteer Hours ...
Standard Report Type

Start Report

ⓘ Details   ☰ Fields (403)

Created By You

📅 **August 15 - September 15, 2022 Board**
Last Used 10/23/2022

📅 **Quarterly Report: Jul-Sept 2022**
Last Used 10/14/2022

📅 **July 15 - August 15, 2022 Board Rep**
Last Used 10/14/2022

Created By Others

Volunteer Manage...

Volunteers Help   Home   Chatter   Tasks ⌄   Volunteers Wizard   Volunteer Jobs ⌄   Shift Calendar   Find Volunteers   Reports ⌄   More ⌄

REPORT ⌄

New Report ✏️ ● ● Contacts with Volunteer Hours and Volunteer Job ●

Got Feedback?   ↶ ↷   🔹 Add Chart   ● Save & Run   Save ⌄   Close   Run

⊙ Previewing a limited number of records. Run the report to see everything.   ● Update Preview Automatically ✓ ●

☰ Outline   ▼ Filters 1

	Salutation ▼	First Name ▼	Last Name ▼	Title ▼	Account Name ▼	Mailing Street ▼	Mailing City ▼	Mailing State/Province ▼	Mailing Zip/Postal Code
1	-								
2	-								
3	-								
4	-								
5	-								
6	-								
7	-								
8	-								
9	-								
10	-								
11	-								
12	-								
13	-								
14	-								
15	-								
16	-								
17	-								
18	-								

Groups

📋 GROUP ROWS

Add group... 🔍

Columns   ▼

Add column... 🔍

Salutation ✕ ●
First Name ✕
Last Name ✕
Title ✕
Account Name ✕
Mailing Street ✕
Mailing City ✕
Mailing State/Province ✕
Mailing Zip/Postal Code ✕
Mailing Country ✕
Phone ✕

Report Layout

Recent Items   📒 Notes

Things to note:

You can easily edit your report name.

REPORT ▾

New Report ✎   Contacts with Volunteer Hours and Volunteer Job
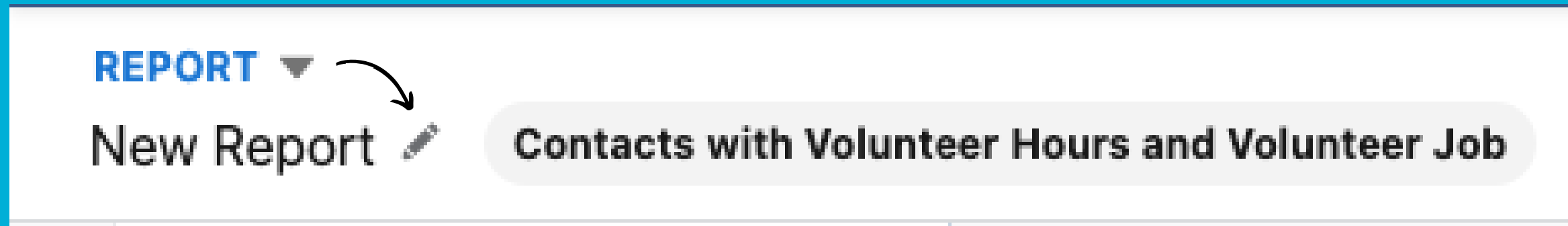
Make sure that Preview Automatically is set to on.

You will see your report update as you make changes.

Save & Run   Save ▾   Close   Run

Update Preview Automatically ✓ ⬤
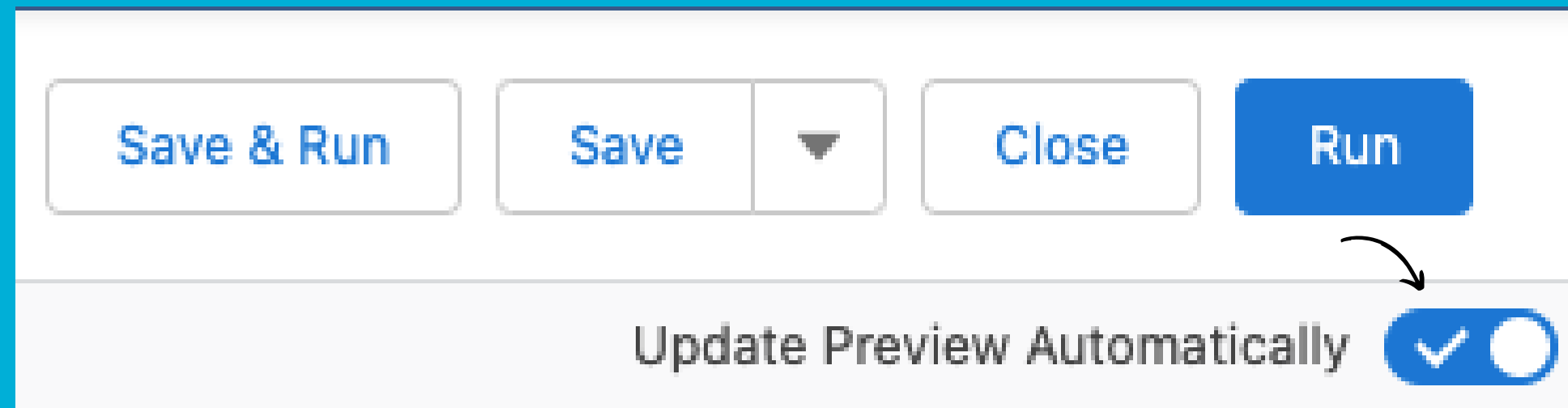
Things to note:
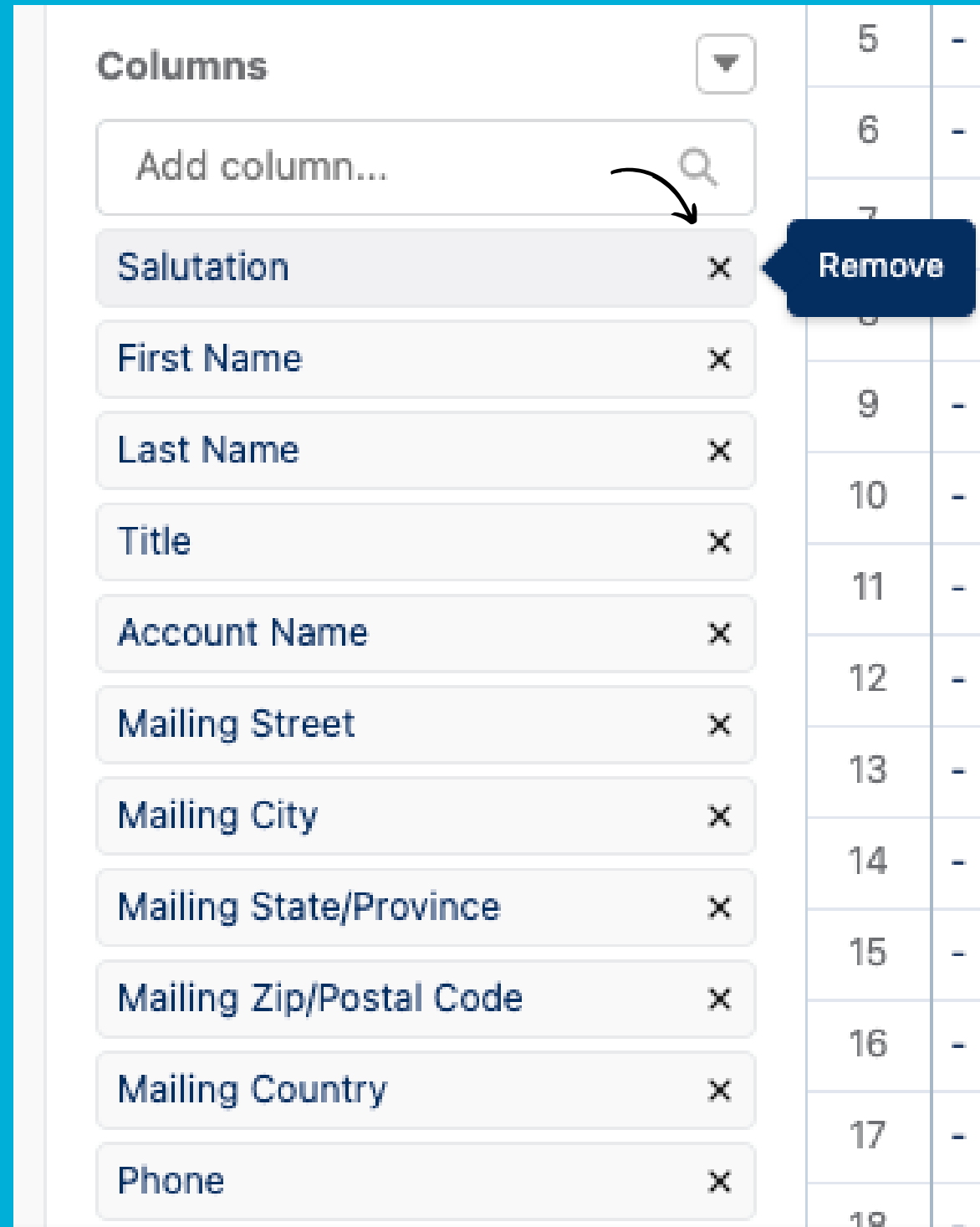
Add a group row for Primary Affiliation
This is how you distinguish between volunteer groups.
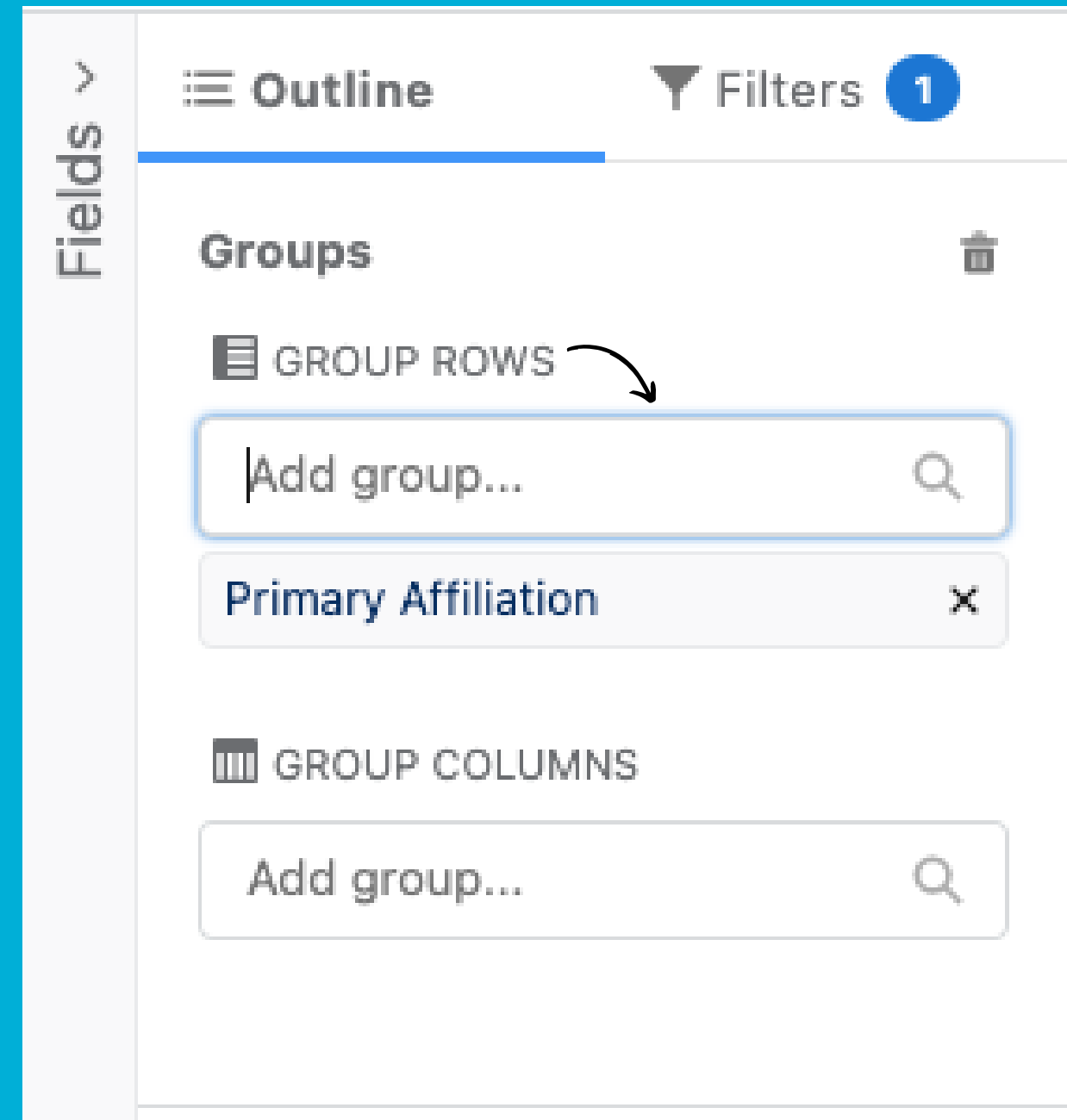
You can edit your columns to include what your report needs.

Left panel:

REPORT ▼

New Report ✏   Contacts with Volunteer Hours and Volunteer Job

☰ Outline   ▼ Filters ①

✓ Previewing a limited num

Primary Affiliation ↑ ▼

Groups   🗑

▤ GROUP ROWS

Add group... 🔍

Primary Affiliation   ✕

▥ GROUP COLUMNS

Add group... 🔍

- (17)

Added group

Columns ▼

Add column... 🔍

Salutation   ✕
First Name   ✕
Last Name   ✕
Title   ✕
Account Name   ✕
Mailing Street   ✕
Mailing City

Right panel:

REPORT ▼

AIM Presentation Example - Adriana

☰ **Outline**   ▼ Filters ②

Groups   🗑

▤ GROUP ROWS

Add group... 🔍

Primary Affiliation   ✕

▥ GROUP COLUMNS

Add group... 🔍

*Updated report name
and columns*

Columns ▼

Add column... 🔍

First Name   ✕
Last Name   ✕
Phone   ✕
Mobile   ✕
Primary Email   ✕
Mailing Address Line 1   ✕
Mailing City   ✕

The necessary columns

to pull the correct

volunteer information

into the report!

Columns

Add column...

First Name	×
Last Name	×
Account Name	×
Mailing Street	×
Mailing City	×
Mailing State/Province	×
Mailing Zip/Postal Code	×
Primary Email	×
Volunteer Job: Volunteer Job Nan	×
Shift Start Date & Time	×

Now that you have your columns, you need to update the filters. This gives Salesfore more detail about what information you're trying to pull.

Fields ›

☰ Outline   ▼ Filters ❶

Filters   ▼

Add filter...   🔍

Show Me
My contacts

Last Activity
All Time

Add a Start Date filter

Filter by Start Date

Operator

equals ▼

✓	equals
	not equal to
	less than
●	greater than
	less or equal
	greater or equal

Filter by Start Date ✕

Choose Start Date and click Apply

Operator

● greater than ▼

Type

Value ▼

Date   Use relative date

9/15/2022 📅

☐ Locked ⓘ

Cancel   **Apply**

Filter by End Date

×

Operator

less than ▾

equals
not equal to
✓ less than
greater than
less or equal
greater or equal

Filter by End Date

×

Choose End Date and click Apply

Operator

• less than ▾

Type

Value ▾

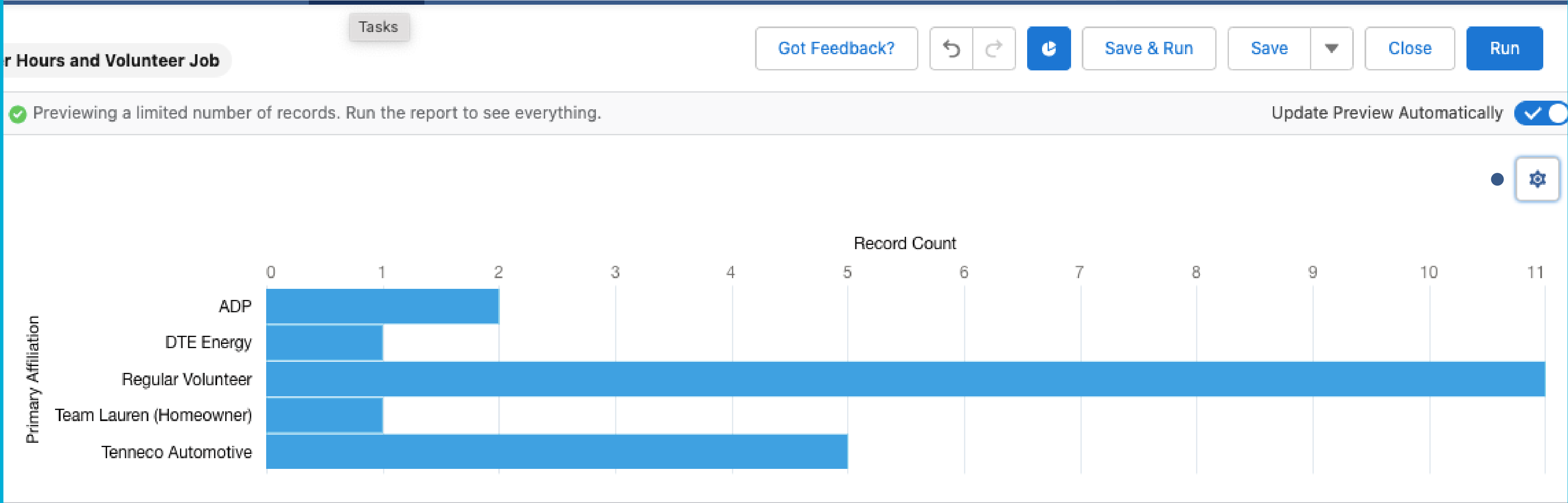## Date

Use relative date

10/15/2022 📅

Locked ⓘ

Cancel   **Apply**

Things to note:

You can Save & Run now if you wish, but...

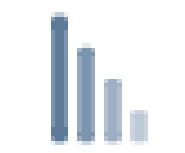it's more fun to add a chart that Salesforce can instantly put together!

The Default Bar Chart

Tasks

r Hours and Volunteer Job

Got Feedback? | Save & Run | Save | Close | **Run**

Update Preview Automatically

Record Count

Primary Affiliation		
ADP		2
DTE Energy		1
Regular Volunteer		11
Team Lauren (Homeowner)		1
Tenneco Automotive		5

Chart Properties
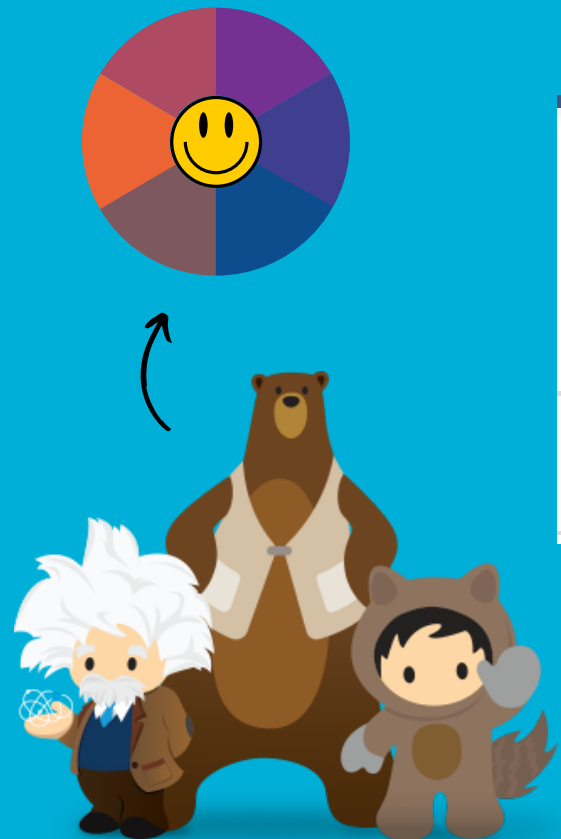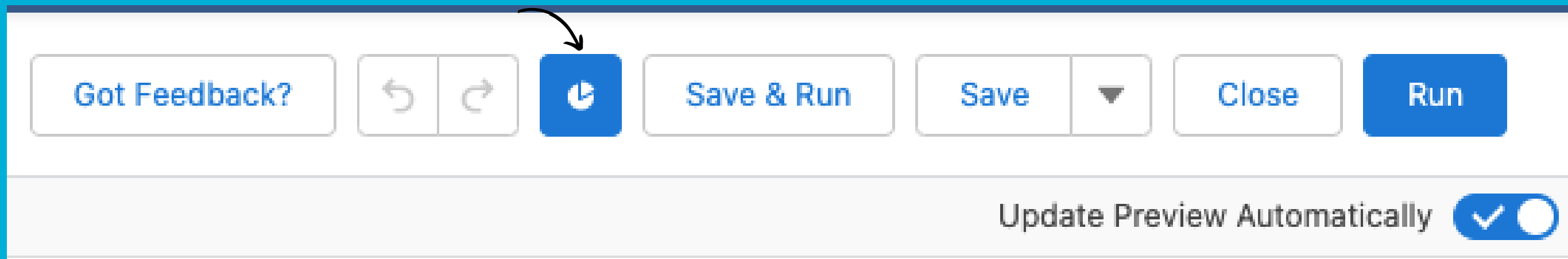
Click to change chart type

Display As

Bar | Column | Stacked Bar | Stacked Column

Line | Donut | Funnel | Scatter Plot

Chart Attributes

Chart Title

Y-Axis

Primary Affiliation

X-Axis

Record Count

Show Reference Line

Display As

Bar | Column | Stacked Bar | Stacked Column
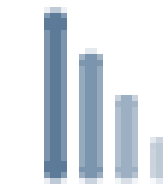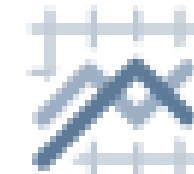
Line | **Donut** | Funnel | Scatter Plot

☐ Show Values

☐ Show Percentages
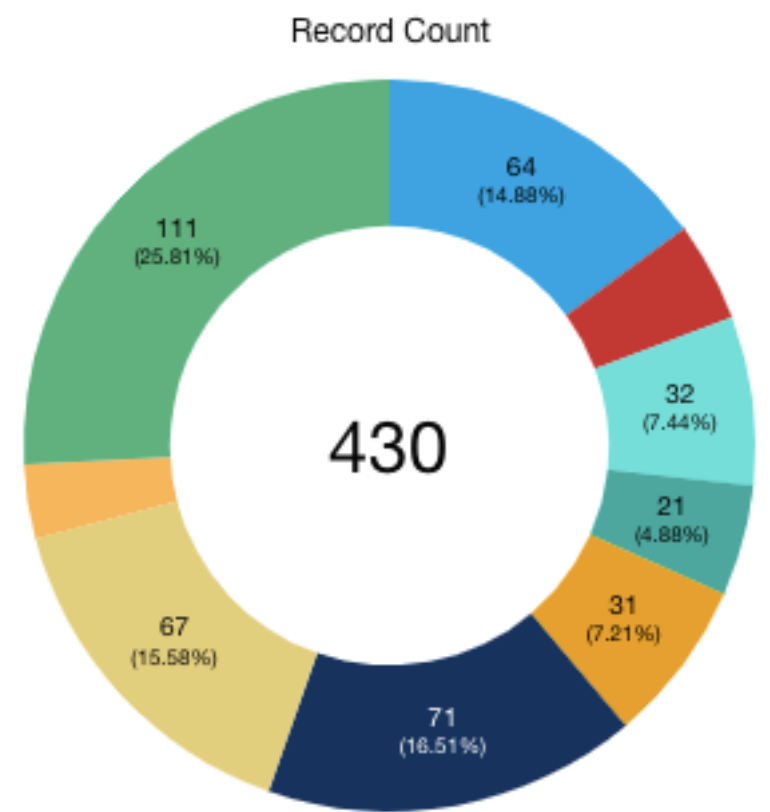
☑ Combine Small Groups into "Others"

☑ Show Total

Finished Report

Q Search...

Volunteer Manage...   Volunteers Help   Home   Chatter   Tasks ⌄   Volunteers Wizard   Volunteer Jobs ⌄   Shift Calendar   Find Volunteers   Reports ⌄   More ⌄

Report: Contacts with Volunteer Hours and Volunteer Job
2022 Volunteers

Q   🔵   ▽   ↻   Edit ⌄

Total Records

430

Record Count

Primary Affiliation

64
(14.88%)

32
(7.44%)

21
(4.88%)

31
(7.21%)

71
(16.51%)

67
(15.58%)

111
(25.81%)

430

- ●
Regular Volunteer ●
DTE Energy ●
Ford Motor Company ●
Tenneco Automotive ●
Home Depot ●
ADP ●
The University of Toledo Chapter of Triangle Fraternity ●
Other ●

| Primary Affiliation ↑ ⌄ | First Name ⌄ | Last Name ⌄ | Account Name ⌄ | Mailing Street ⌄ | Mailing City ⌄ | Mailing State/Province ⌄ | Mailing Zip/Postal Code ⌄ | Mailing Cou |

Finished Donut Chart

Record Count

6.12%
6.12%
12.24%
22.45%
5.1%
5.1%
5.1%
7.14%
26.53%

98

Primary Affiliation

-
Regular Volunteer
Homeowner
DTE Energy
Ford Motor Company
La-Z-Boy, Inc.
Tenneco Automotive
Home Depot
ADP
Other
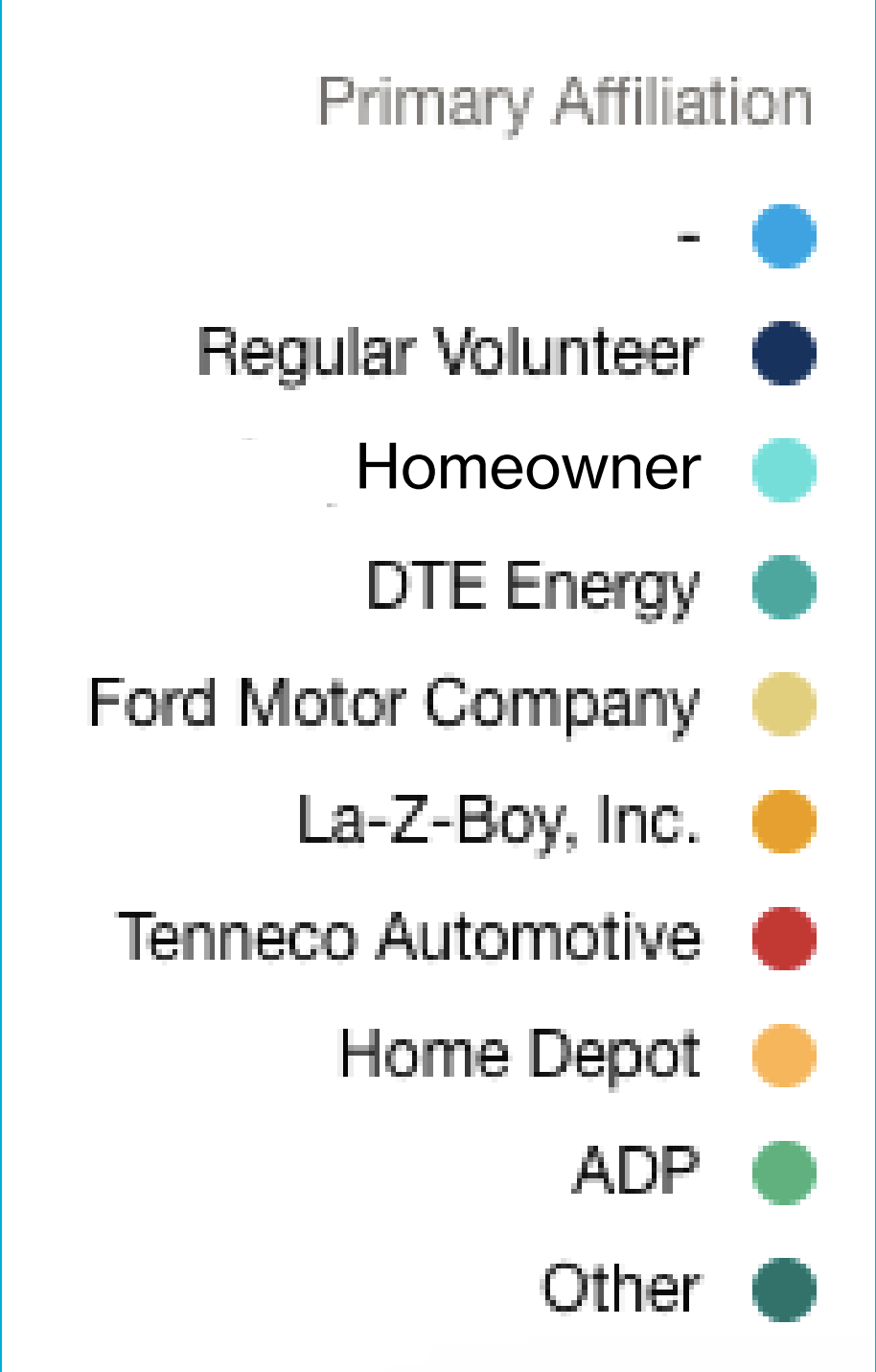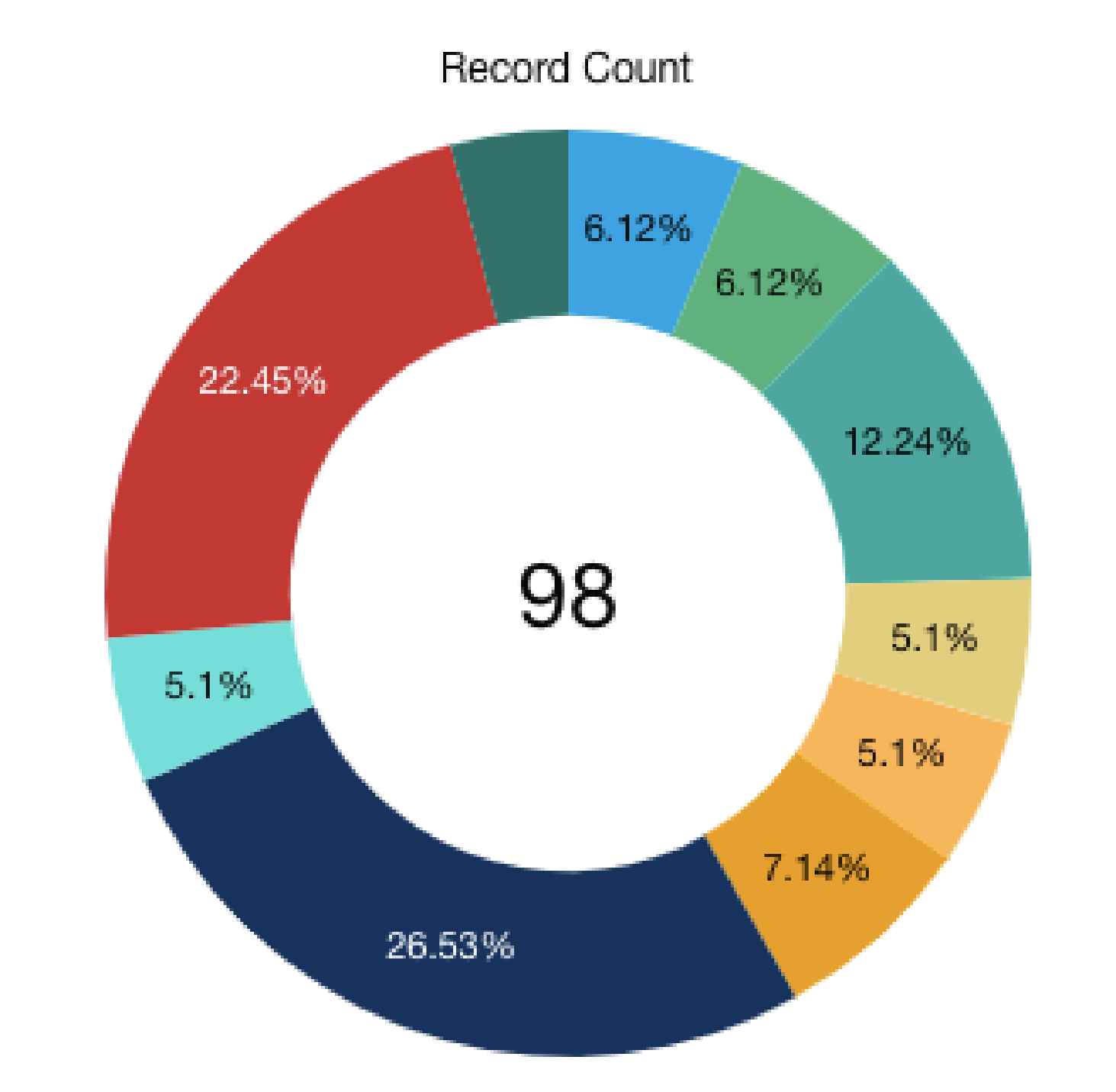
Reminder: Make sure to denote all of your account/contact's Primary Affiliation!
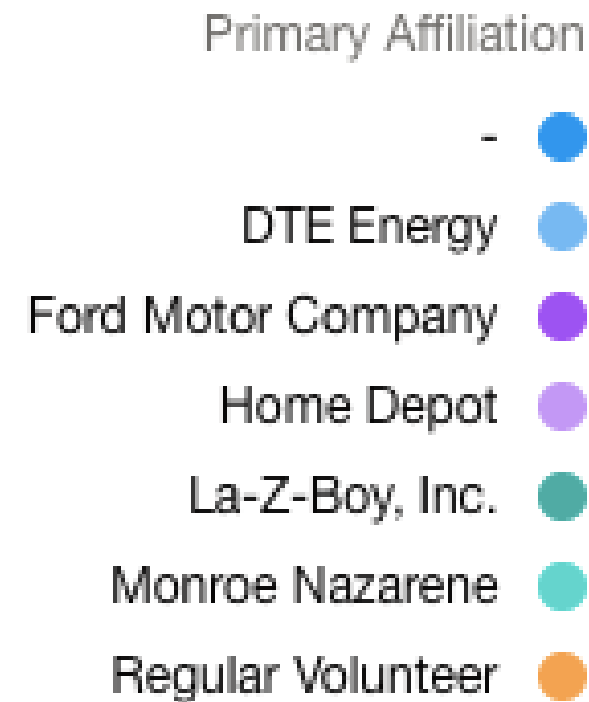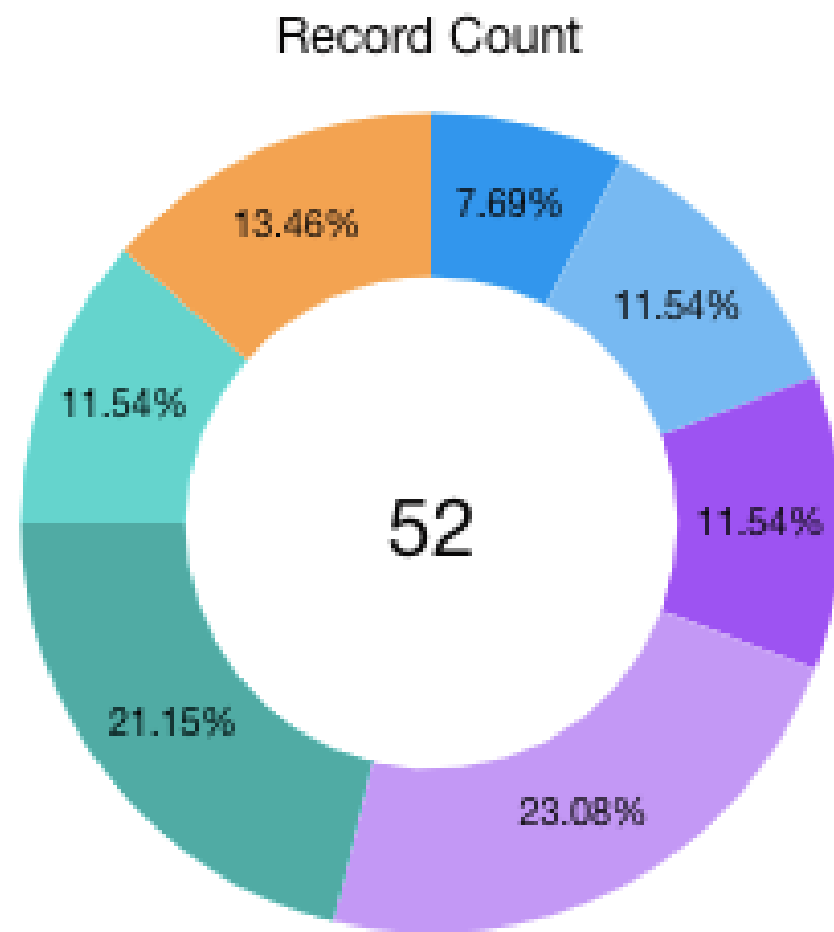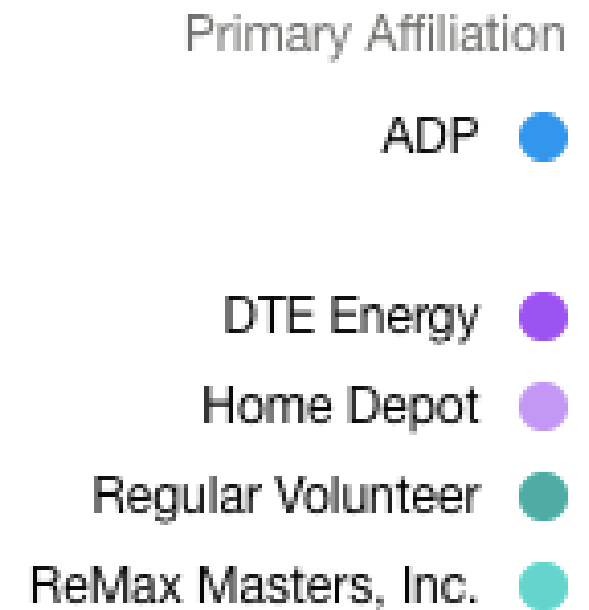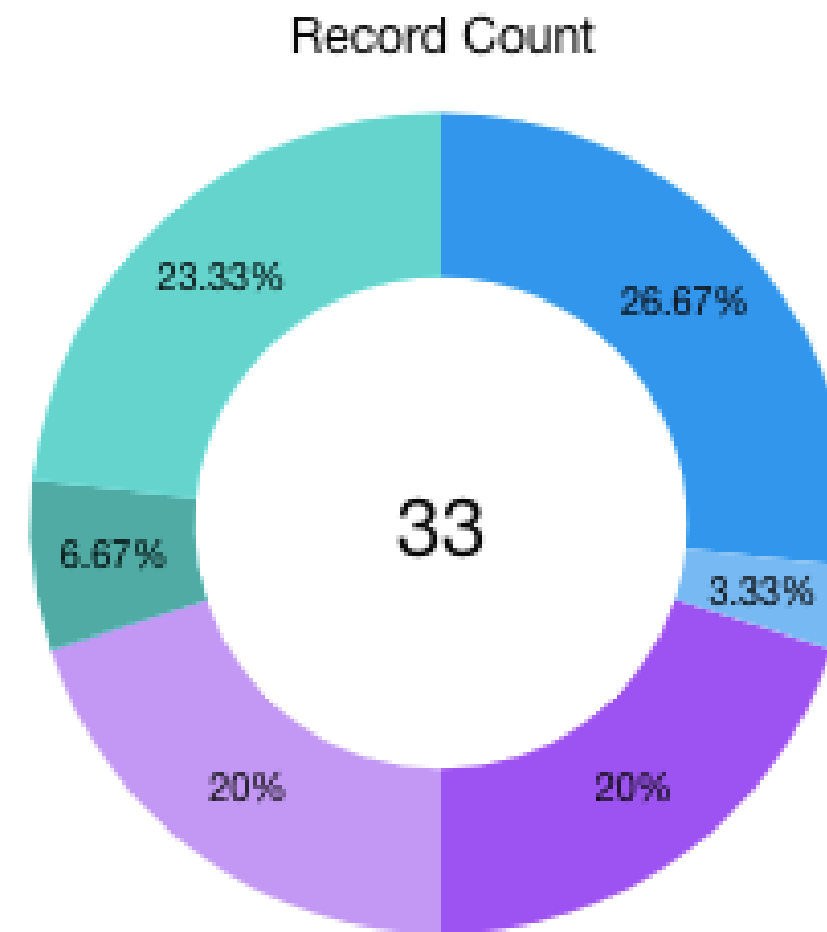
You can create Dashboards as a part of your volunteer tracking processes. Input monthly, quarterly, and yearly volunteer data if you so choose.

Fund Development / Reporting:

- Compile donor contact lists for appeal efforts

- Generate email lists of lapsed donors

- Track Campaigns and Events

- Create Activity reports for your Team

How to create the perfect Report

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

File and Content Reports

Individuals

Other Reports

Select a Report Type

🔍 Search Report Types...

Report Type Name	Category	
Accounts with EP tasks Test 2	Custom	▼
Accounts with EP tasks Test	Custom	▼
Accounts with Readiness with ReStore with ReStore	Custom	▼
Accounts with Readiness with ReStore	Custom	▼
Accounts with Readiness with ReStore Net Cash	Custom	▼
Accounts with ReStores and Quarterly Reports	Custom	▼
Affiliates w/wo Readiness, ReStores, Net Cash	Custom	▼
Accounts with Affiliations with Contacts	Custom	▼
Accounts with Chatter feeds	Custom	▼
Opportunities	Standard	▼
Opportunities and Recurring Donation	Standard	▼
Opportunities and Batch	Standard	▼
Opportunities and Batch	Standard	▼
Opportunities and Bank Account	Standard	▼
Opportunities and Payment Card	Standard	▼

What data do you need?

REPORT ▾

Year End Appeal mailing list ✎   Accounts with Opportunities

Got Feedback?   ↶ ↷   Add Chart   Save & Run   Save ▾   Close   **Run**

≡ Outline   ▼ Filters ③

⚠ To see the latest edits, refresh the preview. Refresh   Update Preview Automatically ⬤

Groups

▤ GROUP ROWS

Add group...   🔍

Columns   ▼

Add column...   🔍

First Name	✕
Last Name	✕
Billing Street	✕
Billing City	✕
Billing State/Province	✕
Billing Zip/Postal Code	✕

	Account Name ▾	Informal Greeting ▾	Primary Contact: Full Name ▾	Donation Name ▾	First Name ▾	Billing Street ▾	Billing City ▾	Billing State/Province ▾	Billing Zip/Postal Code ▾
1	Curcio FitzAlan	Curcio	Curcio FitzAlan	04/10/2022 Curcio FitzAlan	-	266 2nd Street	Lansing	MI	48919
2	Lenore Kerman	Lenore	Lenore Kerman	09/23/2021 Lenore Kerman	-	6311 Moulton Place	Warren	MI	48092
3	Tillie Jollye	Tillie	Tillie Jollye	03/24/2021 Tillie Jollye	-	868 Schlimgen Road	Flint	MI	48555
4	Melony Reinbech	Melony	Melony Reinbech	05/07/2022 Melony Reinbech	-	655 Pine View Park	Detroit	MI	48295
5	Rhoda Hammelberg	Rhoda	Rhoda Hammelberg	08/13/2021 Rhoda Hammelberg	-	37 Grover Parkway	Warren	MI	48092
6	Alasdair McShea	Alasdair	Alasdair McShea	06/06/2022 Alasdair McShea	-	052 Randy Circle	Saginaw	MI	48604
7	Sheppard Simko	Sheppard	Sheppard Simko	06/20/2021 Sheppard Simko	-	9 Fairfield Alley	Grand Rapids	MI	49505
8	Ethelbert Elvish	Ethelbert	Ethelbert Elvish	07/24/2022 Ethelbert Elvish	-	59268 Raven Trail	Lansing	MI	48919
9	Jacquelyn Frany	Jacquelyn	Jacquelyn Frany	12/05/2020 Jacquelyn Frany	-	93 Lyons Place	Kalamazoo	MI	49048
10	Jacquette Ebbetts	Jacquette	Jacquette Ebbetts	07/15/2022 Jacquette Ebbetts	-	752 Mayer Plaza	Midland	MI	48670
11	Quintana Fuchs	Quintana	Quintana Fuchs	08/31/2021 Quintana Fuchs	-	87 Melrose Trail	Battle Creek	MI	49018
12	Kienan Duinbleton	Kienan	Kienan Duinbleton	02/10/2022 Kienan Duinbleton	-	27762 Carpenter Street	Troy	MI	48098
13	Hilario Kelson	Hilario	Hilario Kelson	12/14/2021 Hilario Kelson	-	0 Artisan Parkway	Grand Rapids	MI	49505
14	Lonnie Renols	Lonnie	Lonnie Renols	09/03/2020 Lonnie Renols	-	634 Sutherland Crossing	Grand Rapids	MI	49544
15	Stanislas Geroldini	Stanislas	Stanislas Geroldini	06/22/2021 Stanislas Geroldini	-	703 Schmedeman Street	Muskegon	MI	49444
16	Kenn Hagard	Kenn	Kenn Hagard	02/23/2022 Kenn Hagard	-	01 Longview Park	Grand Rapids	MI	49560
17	Marja Backhurst	Marja	Marja Backhurst	04/10/2021 Marja Backhurst	-	073 Sugar Alley	Detroit	MI	48224
18	Euell De Roberto	Euell	Euell De Roberto	06/09/2021 Euell De Roberto	-	11 Brentwood Parkway	Detroit	MI	48267
19	Goldie Gilston	Goldie	Goldie Gilston	04/20/2021 Goldie Gilston	-	07294 Dixon Lane	Grand Rapids	MI	49544
20	Zulema Margetson	Zulema	Zulema Margetson	06/01/2021 Zulema Margetson	-	06628 Ludington Plaza	Saginaw	MI	48609
21	Noah Yearron	Noah	Noah Yearron	02/05/2022 Noah Yearron	-	7833 Esch Street	Detroit	MI	48267

Time to narrow down those details and name your report

Fund Development ... | Home | Reports ▾ | Dashboards ▾ | Opportunities ▾ | Campaigns ▾ | Accounts ▾ | Contacts ▾ | Calendar ▾ | Getting Started | Tasks ▾ | Chatter | General Accounting Units ▾ | Engagement Plan Templates ▾ | More ▾

EPORT ▾

ear End Appeal mailing list ✎   **Accounts with Opportunities**

Got Feedback? | Add Chart | Save & Run | Save ▾ | Clos

☰ Outline   ▼ Filters ②

⚠ To see the latest edits, refresh the preview. Refresh   Update Preview Au

Filters ▾

Add filter... 🔍

Show Me
All accounts

Created Date
All Time

Billing Street
not equal to "" 🗑

Account Record Type
equals Household Account 🗑

Total Gifts 🗑

#	Account Name	Informal Greeting	Primary Contact: Full Name	Donation Name	First Name	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code
1	Curcio FitzAlan	Curcio	Curcio FitzAlan	04/10/2022 Curcio FitzAlan	-	266 2nd Street	Lansing	MI	48919
2	Lenore Kerman	Lenore	Lenore Kerman	09/23/2021 Lenore Kerman	-	6311 Moulton Place	Warren	MI	48092
3	Tillie Jollye	Tillie	Tillie Jollye	03/24/2021 Tillie Jollye	-	868 Schlimgen Road	Flint	MI	48555
4	Melony Reinbech	Melony	Melony Reinbech	05/07/2021 Melony Reinbech	-	655 Pine View Park	Detroit	MI	48295
5	Rhoda Hammelberg	Rhoda	Rhoda Hammelberg	08/13/2021 Rhoda Hammelberg	-	37 Grover Parkway	Warren	MI	48092
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			ppard Simko	06/20/2021 Sheppard Simko	-	9 Fairfield Alley	Grand Rapids	MI	49505
			lbert Elvish	07/24/2022 Ethelbert Elvish	-	59268 Raven Trail	Lansing	MI	48919
			uelyn Frany	12/05/2020 Jacquelyn Frany	-	93 Lyons Place	Kalamazoo	MI	49048
			uette Ebbetts	07/15/2022 Jacquette Ebbetts	-	752 Mayer Plaza	Midland	MI	48670
			ntana Fuchs	08/31/2021 Quintana Fuchs	-	87 Melrose Trail	Battle Creek	MI	49018
			an Duinbleton	02/10/2022 Kienan Duinbleton	-	27762 Carpenter Street	Troy	MI	48098
			io Kelson	12/14/2021 Hilario Kelson	-	0 Artisan Parkway	Grand Rapids	MI	49505
14	Lonnie Renols	Lonnie	Lonnie Renols	09/03/2020 Lonnie Renols	-	634 Sutherland Crossing	Grand Rapids	MI	49544
15	Stanislas Geroldini	Stanislas	Stanislas Geroldini	06/22/2021 Stanislas Geroldini	-	703 Schmedeman Street	Muskegon	MI	49444
16	Kenn Hagard	Kenn	Kenn Hagard	02/23/2022 Kenn Hagard	-	01 Longview Park	Grand Rapids	MI	49560
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19	Goldie Gilston	Goldie	Goldie Gilston	04/20/2021 Goldie Gilston	-	07294 Dixon Lane	Grand Rapids	MI	49544
20	Zulema Margetson	Zulema	Zulema Margetson	06/01/2021 Zulema Margetson	-	06628 Ludington Plaza	Saginaw	MI	48609
21	Noah Yearron	Noah	Noah Yearron	02/05/2022 Noah Yearron	-	7833 Esch Street	Detroit	MI	48267

Filter by Total Gifts ✕

Operator

greater than ▾

499

☐ Locked ⓘ   Cancel   Apply

Export, Add to Dashboard and More!

Sandbox: AIM2022

Fund Development ...   Home   Reports   Dashboards   Opportunities   Campaigns   Accounts   Contacts   Calendar   More

Report: Accounts with Opportunities
Year End Appeal mailing list
Account mailing list with addresses for Annual Year End Appeal mailing

Add Chart   Edit

Edit (Salesforce Classic)

Save As

Save

Subscribe

Export

Delete

Add to Campaign

Add to Dashboard

Total Records

190

	First Name	Last Name	Account Name	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code ↑	
1	-	-	Aida Hagard	33809 Kipling Place	Southfield	MI	48076	
2			Aida Hagard	33809 Kipling Place	Southfield	MI	48076	
3			Aida Hagard	33809 Kipling Place	Southfield	MI	48076	
4			Lenore Kerman	6311 Moulton Place	Warren	MI	48092	
5			Rhoda Hammelberg	37 Grover Parkway	Warren	MI	48092	
6			Melicent Briscam	7 Rowland Trail	Warren	MI	48092	
7			Lenore Kerman	6311 Moulton Place	Warren	MI	48092	

Now you've got something to work with...

	A	B	C	D	E	F	G	H	I	J	K
1											
2					Year End Appeal mailing list						
3					As of 2022-10-25 16:04:50 Eastern Standard Time/EST • Generated by Kelly Cafek (Oakland) • Sorted by Billing Zip/Postal Code (Ascending)						
4											
5											
6					Filtered By						
7					Show: All accounts						
8					Billing Street not equal to						
9					Account Record Type equals Household Account						
10					Total Gifts greater than 499						
11											
12	First Name	Last Name	Account Name		Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code			
13			Aida Hagard		33809 Kipling Place	Southfield	MI	48076			
14			Aida Hagard		33809 Kipling Place	Southfield	MI	48076			
15			Aida Hagard		33809 Kipling Place	Southfield	MI	48076			
16			Lenore Kerman		6311 Moulton Place	Warren	MI	48092			
17			Rhoda Hammelberg		37 Grover Parkway	Warren	MI	48092			
18			Melicent Briscam		7 Rowland Trail	Warren	MI	48092			
19			Lenore Kerman		6311 Moulton Place	Warren	MI	48092			

Year End Appeal mailing list

Team Check-In

we're halfway through!

1 Volunteer Management / Reporting ☑

2 Fund Development / Reporting ☑

How are you feeling?

Hopefully over the moon with
KNOWLEDGE!

Dashboards:

- Turn reports into single snapshots of where you are.

- Present multiple reports side-by-side

- Track Actual to Goal for
  - Teams
  - Individuals
  - Campaigns

$34k (113%)

3.5M

Individual Example:

Director Dashboard View

Search...

Dashboard
Volunteer Management 2022
As of Oct 26, 2022 12:41 PM·Viewing as Staci Jennings
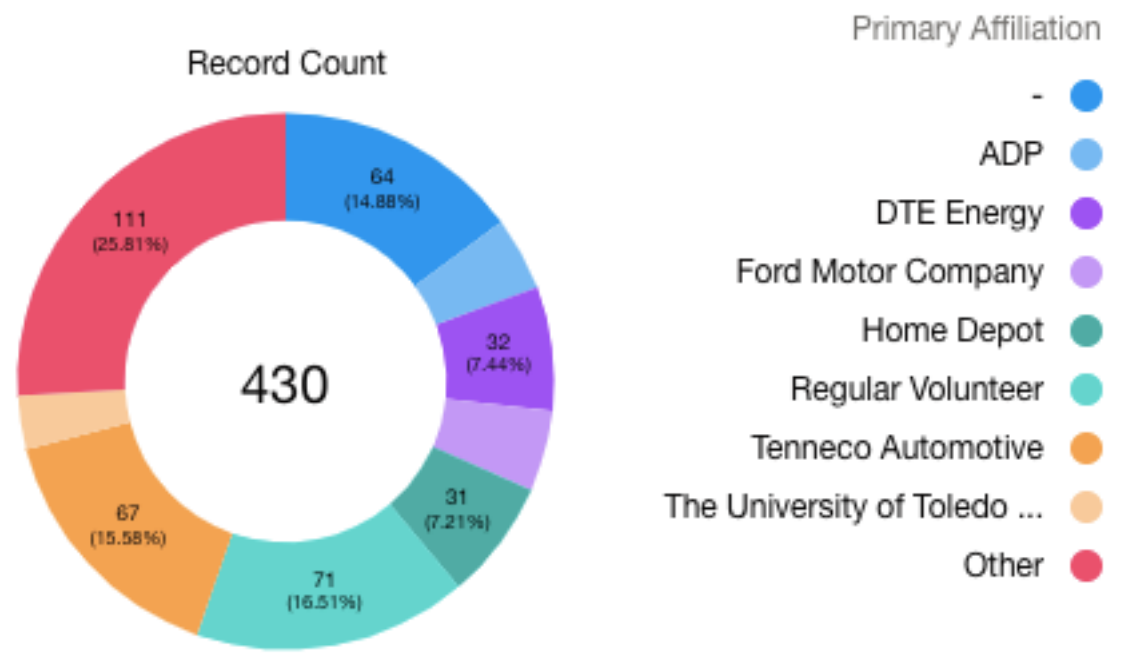
Refresh | Edit | Subscribe

2022 Volunteers

Record Count

Primary Affiliation

- 430 (center)
- 64 (14.88%)
- 32 (7.44%)
- 31 (7.21%)
- 71 (16.51%)
- 67 (15.58%)
- 111 (25.81%)

- –
- ADP
- DTE Energy
- Ford Motor Company
- Home Depot
- Regular Volunteer
- Tenneco Automotive
- The University of Toledo ...
- Other

View Report (2022 Volunteers)

September 15- October 15, 2022 Board Rep

Record Count

Primary Affiliation

- 56 (center)
- 3 (10%)
- 6 (20%)
- 2 (6.67%)
- 8 (26.67%)
- 10 (33.33%)

- –
- DMW
- DTE Energy
- EMU Nurses
- Ford Motor Company
- Kappa Delta Rho
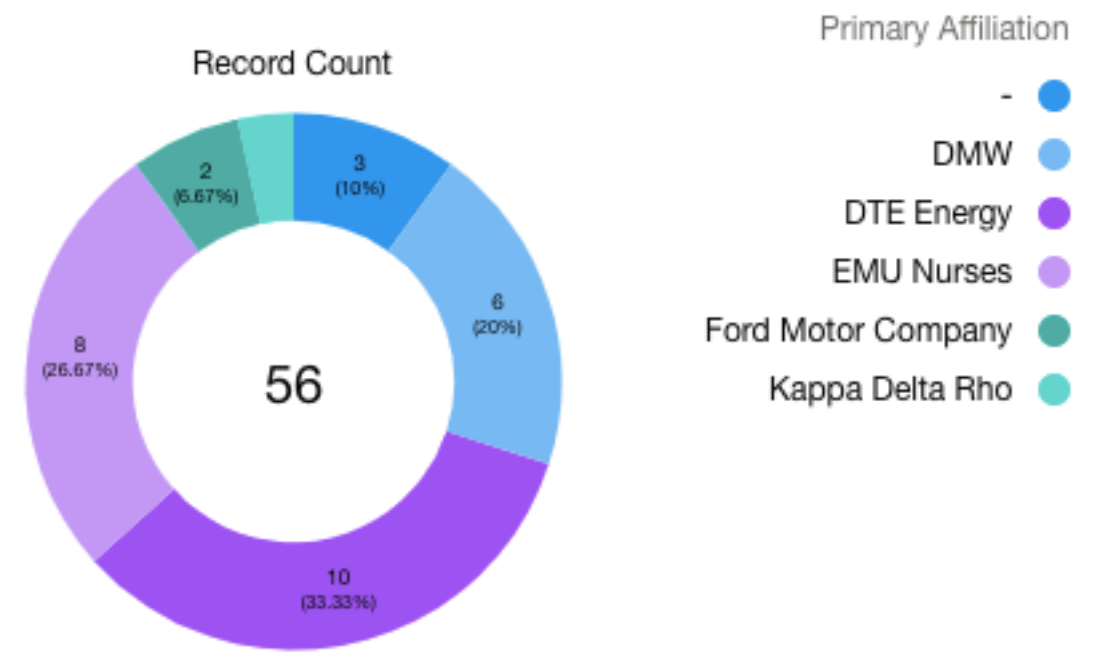
View Report (September 15- October 15, 2022 Board Rep)

2022 Volunteers

Record Count

Primary Affiliation

Primary Affiliation	Value
–	64
ADP	19
American Legion Riders P...	4
Barton Malow	8
Berkshire Hathaway	11
DMW	6
Downriver West Kiwanis	6
DTE Energy	32
EMU Nurses	8
Erie Mason NHS	12
First Merchants	10
Ford Motor Company	21
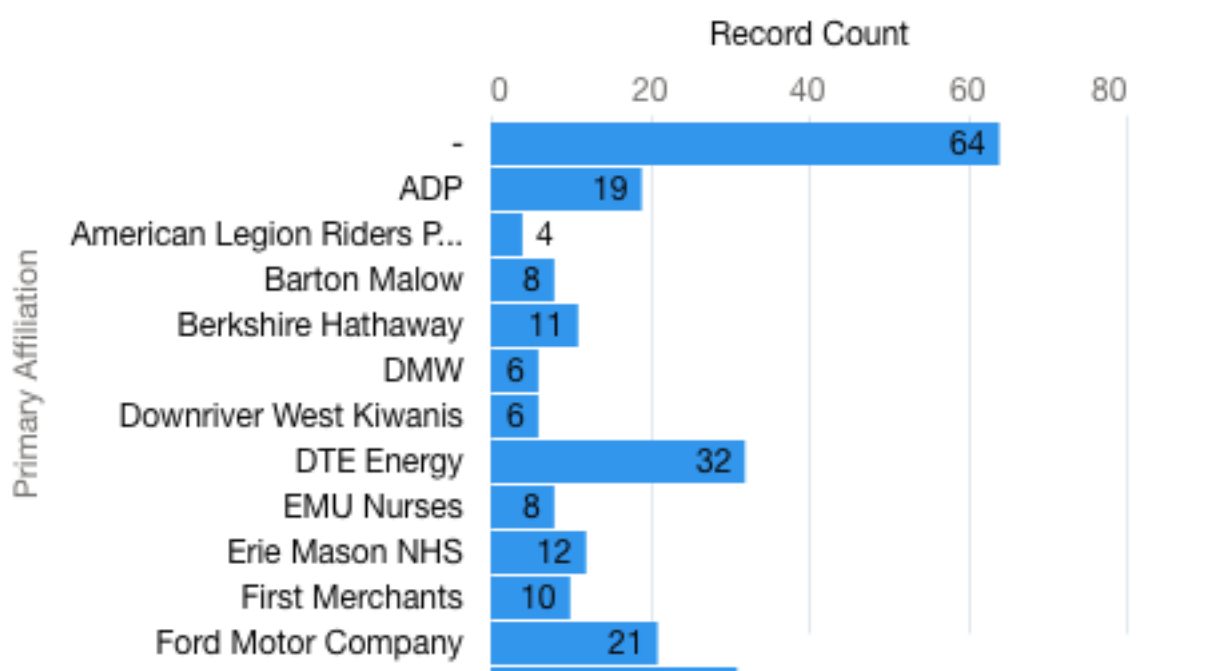
View Report (2022 Volunteers)

2022 Volunteers

4.1к

View Report (2022 Volunteers)

September 15- October 15, 2022 Board Rep

1к

View Report (September 15- October 15, 2022 Board Rep)

New Dashboard

Home	Reports ⌄	Dashboards ⌄	Opportunities ⌄	Campaigns ⌄	Accounts ⌄	Contacts ⌄	Calendar ⌄	More ⌄

Dashboards
Recent
3 items

🔍 Search recent dashboards...   New Dashboard   New Folder   ⚙⌄

DASHBOARDS

Recent

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

Dashboard Name ⌄	Description ⌄	Folder ⌄	Created By ⌄	Created On ⌄	Subscribed
Kelly DashBoard		Private Dashboards	Kelly Cafek (Oakland)	10/6/2022, 3:36 PM	⌄
SSO Fund Development Dashboard-Orgs	Reports for all Account Record Types and all Opportunity Record Types	HFHM - Dashboards	Sally Burns (SSO)	7/25/2019, 9:45 AM	⌄
Ernesto DashBoard		Private Dashboards	Kelly Cafek (Oakland)	10/7/2022, 4:06 PM	⌄

Remember: When looking up Dashboards (and Reports) make sure you are looking under All Dashboards!

Name your Dashboard, give a detailed description of what/who it is for.

New Dashboard

* Name

Description

Cancel   Create

Don't forget to scroll down to save in the desired Folder!

New Dashboard

Description

Folder

Private Dashboards   Select Folder

Cancel   Create

Empty canvas to build out ☺

Select the Report you want to display
NOTE: Don't forget to look in All Reports!

Search...

Fund Development ... | Home | Reports ⌄ | Dashboards ⌄ | Opportunities ⌄ | Campaigns ⌄ | Accounts ⌄ | Contacts ⌄ | Calendar ⌄ | More ⌄

Save

＋ Component | ＋ Filter | Save | ✕

Select Report

Reports

Search Reports and Folders...   Reports and Folders ▼

Recent

Created by Me

Private Reports

Kelly Opportunities by Stage
Kelly Cafek (Oakland) · Oct 6, 2022 4:04 PM · Private Reports

Ernesto Received by Campaign Report
Kelly Cafek (Oakland) · Oct 7, 2022 4:10 PM · Private Reports

Cancel   Select

Add Component

Ernesto Opportunities by Stage ✕

☐ Use chart settings from report ⓘ

Display As

Preview

Ernesto Opportunities by Stage

Record Count

| 0 | 10 | 20 | 30 | 40 |

Committed ━━━ 8

Received ━━━━━━━━━━ 36
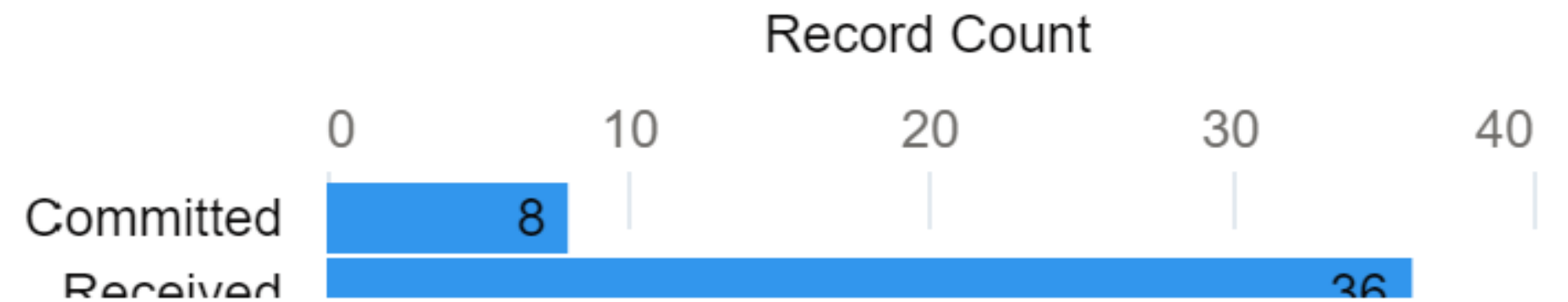
View Report (Ernesto Opportunities by Stage)

Cancel   Add

②

Sort By

Stage ▼ ↑

Custom Link

Max Groups Displayed

100

③

Title

Kelly Opportunities by Stage

Subtitle

Footer

Y-Axis

Stage

X-Axis

Record Count

Display Units

Shortened Number

☑ Show Values

☐ Show Chatter Photos

X-Axis Range

◉ Automatic

◯ Custom

Decimal Places

Automatic

Gauge Chart

Actual to Goal

$120к $180к

$60к $240к

$0 $300к

$96к

View Report (Received Report)

Opportunities by Stage

Sum of Amount

$903k

$500k

$282k

$96k
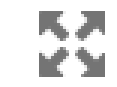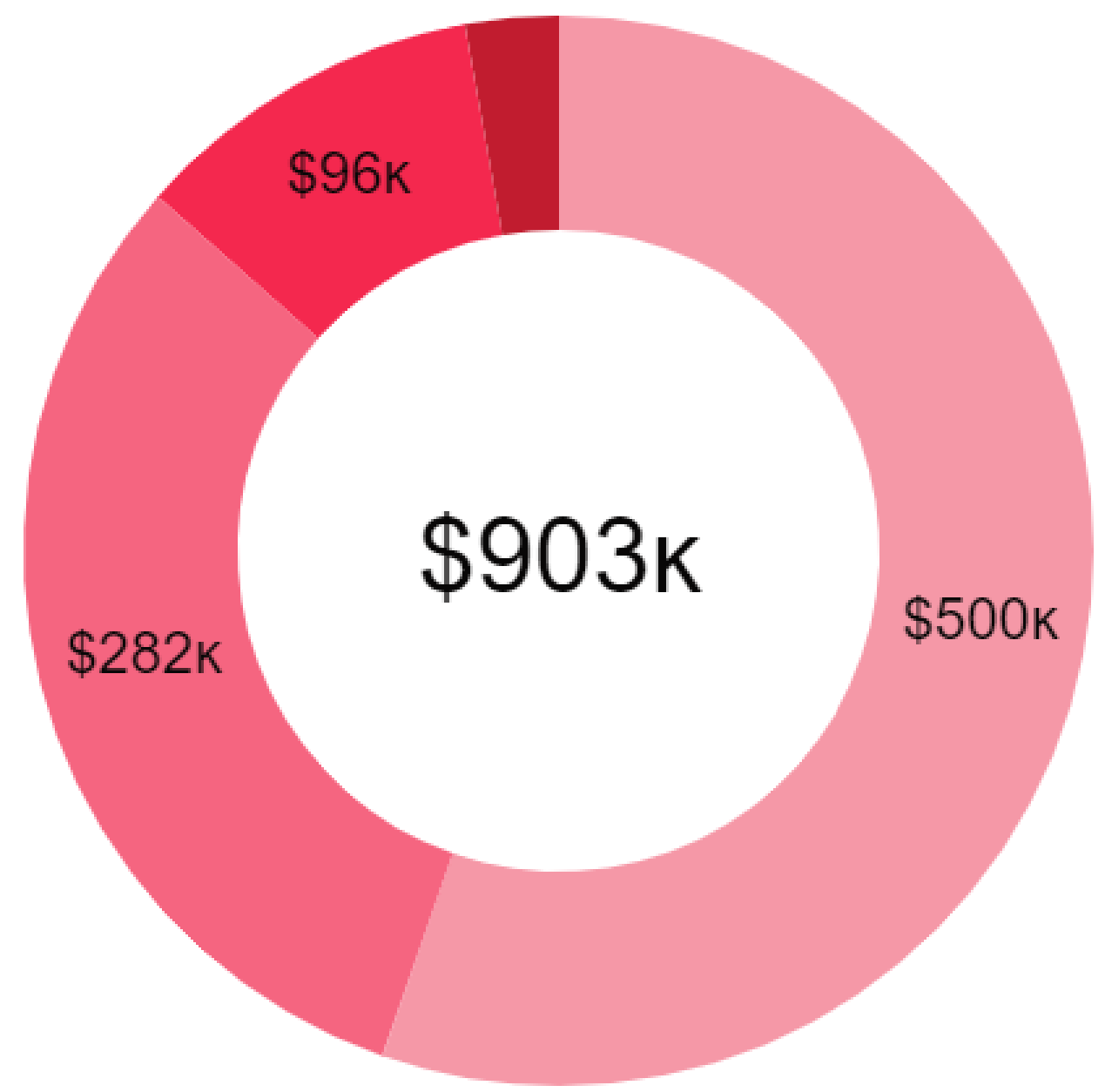
Stage

Researching
Ask
Received
Other

View Report (Opportunities by Stage)

Donut Chart

Metric Chart

Rec...

$96k

View Report (

Funnel Chart

You can click
View Report
to acess the full report!

Opportunities by Campaign

Sum of Amount: $116K

$78K

$9.5K

$10K

$16K

Related Campaign

Annual Fund

Cars for Homes

Rock the Block

Women Build

Other

View Report (Event Donation Reports)
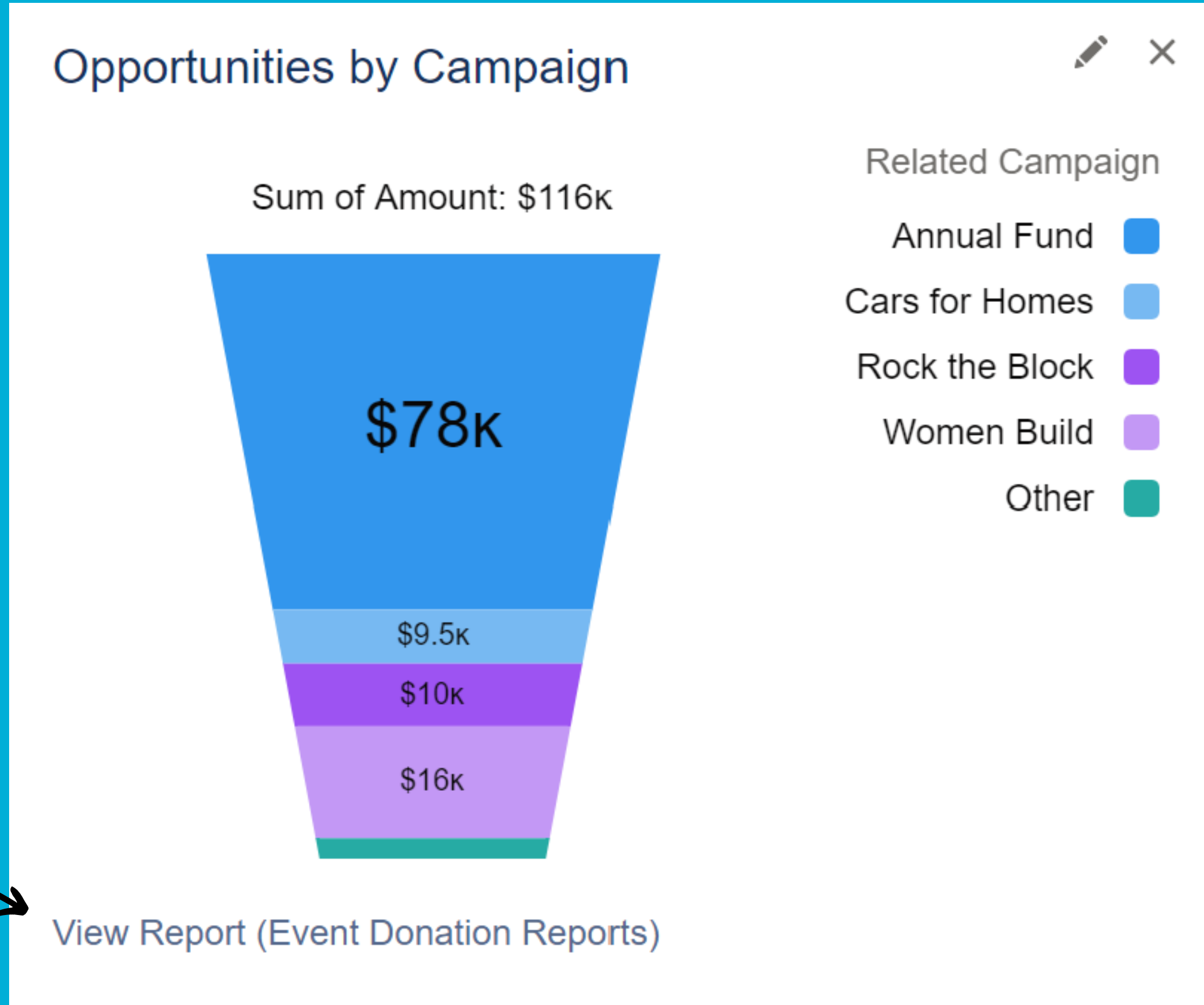
Apsona:

- Simplest way to acknowledge donors.

- A suite of Salesforce add-on apps for data management, document generation, reporting, and charting.

- Merge multiple acknowledgement letters to mail or email!

«Date»

«Full Name»
«Account»
«Street Address»
«City», «State» «Zip»

Dear «First Name»,

On behalf of Habitat for Humanity of Oakland County, I want to personally thank you for your generous gift of «Amount». You are helping us to achieve our vision of a world where everyone has a safe place to live.

The need for affordable housing for low to moderate-income families and individuals has never been more urgent. Despite the challenges of the last few years, we continue to serve our neighbors who need the stability and hope that safe and decent housing provides. This would not be possible without your support!

Over our 26-year history, over 1,200 low-and-moderate income families and individuals have improved their lives because of their hard work with us. We remain committed to our mission of bringing people together to build homes, communities, and hope.

If you would like more information about Habitat Oakland County projects or programs, please contact me at 248.318.5491 or by email at annd@habitatoakland.org.

You are truly making a difference in our community!

Sincerely,

Ann Duke

Chief Development Officer

Build your Thank You Letter

- Remember the Merge Fields
    - Name/Account
    - Address
    - Donation Amount
    - Notes
- List Fair Market Value
- Can even contain signatures!

Let's get started!

npsp

Search...

Fund Development ...   Getting Started   Home   Accounts ⌄   Contacts ⌄   Opportunities ⌄   Reports ⌄   Campaigns ⌄   Dashboards ⌄   Apso

apsona
for salesforce

Hi, Kelly Cafek (Oakland)   **Habitat for Humanity of Michigan**   Help

Accounts   Contacts   Opportunities   Campaigns   Events   **Documents**   Tasks   More ▾   Settings   Reporting tools

Documents

Search ▾ [   ] 🔍 ✕   Filter: (None) [▾] ▽   ⟳ Refresh   ⬆ Upload   Tools ▾

1 – 142 of 142   Rows per page: 200 ⌄

☐ Document Name	Created Date	Last Modified Date
🔍	🔍	🔍
☐ 2021 Gala Donations Contact - Post Event.docx	05/02/2019 12:33 pm	11/22/2021 11:23 am
☐ 2021 Gala InKind Business.docx	12/10/2019 11:47 am	11/22/2021 01:27 pm
☐ 2021 Gala InKind Contact.docx	12/10/2019 11:59 am	10/25/2021 11:58 am
☐ 2021 Gala Sponsor.docx	01/19/2017 11:36 am	10/25/2021 11:45 am
☐ 2021 Gala Ticket Business.docx	11/13/2020 02:57 pm	11/22/2021 12:36 pm

Document details

⬇ Download   Replace

Document Name	2021 Gala Donations Contact - Post Event.docx	Author	Kelly Cafek (Oakland)
Body	(Not shown)	Body Length	77281
Deleted		Description	
Document Content Searchable	√	Document Unique Name	Bowman_General_TY
Externally Available		File Extension	docx
Internal Use Only		Keywords	
MIME Type	application/vnd.openxmlforma... officedocument.wordprocessin...	Namespace Prefix	

Upload your Acknowledgement Letter

psona
for salesforce

Hi, Kelly Cafek (Oakland)

Help ▾   Feedb

Habitat for Humanity of Michigan

Accounts   Contacts   Opportunities   Campaigns   Events

ocuments   Search ▾   [   ]🔍   Upload   Tools ▾

Upload Document   ✕

Upload file: [Choose File] No file chosen

Document Unique
Name: [   ]

Upload to folder: [Oakland Documents   ▾]

[Upload]   [Cancel]

– 142 of 142   Rows per page: 200 ▾   Download   Replace

Document Name   Created Date   Last Modified   Author Kelly Cafek (Oakland)

[🔍]   [🔍]   [

2021 Gala Donations   05/02/2019 12:33 pm   11/22/2021   Length 77281
Contact - Post
Event.docx   scription

2021 Gala InKind   12/10/2019 11:47 am   11/22/2021   cument Bowman_General_TY
Business.docx   Unique
                                                             Name

2021 Gala InKind   12/10/2019 11:59 am   10/25/2021 11:58 am   File docx
Contact.docx   Extension

2021 Gala Sponsor.docx   01/19/2017 11:36 am   10/25/2021 11:45 am   Keywords

2021 Gala Ticket   11/13/2020 02:57 pm   11/22/2021 12:36 pm   MIME Type application/vnd.openxmlforma...   Namespace
Business.docx   officedocument.wordprocessin...   Prefix

Define Fliters

Accounts	Contacts	**Opportunities**	Campaigns	Events	Documents	Tasks	More ▾	Settings	Reporting tools

Edit report

💾 Save   📤 Save & run   ▶ Run   ✖ Cancel

Report name: General_Business

Description:

Record range: 1   to 100,000

Table data	**Filter terms**	Sort order

Filter terms (5)   Add term   Copy from existing filter

✖ 1. Campaign.Name   ▾   is empty   ⌄

✖ 2. Campaign.Name   ▾   contains   ⌄   annual

✖ 3. Opportunity.Acknowledgment St... ▾   is among   ⌄   To Be Acknowledged ▾

✖ 4. Account.Record type   ▾   is among   ⌄   Organization   ▾

✖ 5. Opportunity.Stage   ▾   is among   ⌄   Received   ▾

Filter logic: 1 and 2 and 3 and 4 and 5   ❓

Preview your results then click Merge/Mail

npsp

Search...

Fund Development ...   Getting Started   Home   Accounts ▼   Contacts ▼   Opportunities ▼   Reports ▼   Campaigns ▼   Dashboards ▼   Apsona   More ▼

apsona
for salesforce

Hi, Kelly Cafek (Oakland)   Habitat for Humanity of Michigan   Help ▼   Feedback

Accounts   Contacts   **Opportunities**   Campaigns   Events   Documents   Tasks   More ▼   Settings   Reporting tools

General_Business   « Back to list   Visualize ▼   📝 Edit   🟢 Run   Export ▼   🖨 Print   📧 Merge/Mail   More tools ▼

Tabular data   Visualization   **Change filters**

3 records   Find...   🔍 ▼ ▲

	Account Na...	Amount	Billing Street	Billing City	Billing State...	Billing Zip/P...	Acknowledg...	Acknowledg...	Donation ID	First Name
1		$234.95	6300⬛⬛⬛.	Clarkston	MI	48346	To Be Acknowled...		0066S000013ar...	Dan
2	⬛⬛⬛	$500.00	3100 ⬛⬛⬛d ...	East Lansing	MI	48823	To Be Acknowled...		0066S000013ar...	Jessica
3	⬛⬛⬛	$500.00					To Be Acknowled...		0066S000012U...	Cathy
		$1,234.95								

Edit/run a Merge Action

What would you like to do?

○ Run an existing merge action

○ Create and run a new merge action

Have you done this before?

First time building it?

3 records will be processed.

Cancel   **Run**

Edit/run a Merge Action

What would you like to do?

○ Run an existing merge action

◉ Create and run a new merge action

Select the type of merge:

◉ Document (.docx/.pdf) merge ❓

○ Address labels ❓

○ Spreadsheet (.xlsx) merge ❓

○ Email merge ❓

○ Email and document merge ❓

○ Email and xlsx merge ❓

3 records will be processed.

Cancel   **Next »**

Edit/run a Merge Action

Document merge options

Document template is in   ● Salesforce Documents   ○ Google Docs   ▶ Conditional templates   What is this?

Document template to use: 2022_General_Business.docx   ⌄ ❓

Output format: ● .docx ○ .pdf

Output structure: ● Single file with page breaks
○ Single file with paragraph breaks
○ Separate files, one for each record ❓

Run Parameters   (Optional - Learn more)   [Add]

This merge action does not have any Run Parameters.

3 records will be processed.

[Cancel]   [« Back]   [Next »]

Edit/run a Merge Action

Document template:

Main (top-level) fields

Merge field	Data field	Merge field	Data field
Account	(Not mapped) ▼	Amount	(Not mapped) ▼
City	(Not mapped) ▼	Date	(Not mapped) ▼
First Name	(Not mapped) ▼	Full Name	(Not mapped) ▼
State	(Not mapped) ▼	Street Address	(Not mapped) ▼
Zip	(Not mapped) ▼		

Choose from the Dropdowns

3 records will be processed.

Cancel   « Back   Next »

Edit/run a Merge Action

| 1. Select action | 2. Choose options | **3. Match fields** | 4. Finish |

Document template:

Main (top-level) fields

Merge field	Data field	Merge field	Data field
Account	Account Name ▼	Amount	Amount ▼
City	Billing City ▼	Date	Today's date ▼
First Name	First Name ▼	Full Name	Full Name ▼
State	Billing State/Province ▼	Street Address	Billing Street ▼
Zip	Billing Zip/Postal Code ▼		

3 records will be processed.

Cancel   « Back   Next »

Connected!

Edit/run a Merge Action

1. Select action	2. Choose options	3. Match fields	4. Finish

☐ Create a Task related to each Opportunity ⌄

Set the field

To value

Task Subject: _____

Opportunity.Acknowledgmei ⌄

Current date & time

Task Status: Completed   ⌄

Opportunity.Acknowledgmei ⌄

Acknowledged ⌄

Due Date: None   ⌄

☐ Attach each output document to the corresponding

(None)   ⌄

Opportunity ⌄   record as Attachment (Classic UI) ⌄ ❓

(None)   ⌄

▸ Email options

▸ Formatting options

Save this action as Document merge: Opportunity 2022-10-26_11:22   ❓

3 records will be processed.

[Cancel]   [« Back]   [Save & Close]   [**Save & Run**]

Look at those results!

October 24, 2022

_____ Financial Inc.
___ Woodward Ave
14th Floor
Detroit, MI 48226

Dear Cynthia,

On behalf of Habitat for Humanity of Oakland County, I want to personally thank you for your generous gift of $4,000.00. You are helping us to achieve our vision of a world where everyone has a safe place to live.

The need for affordable housing for low to moderate income families and individuals has never been more urgent. Despite the challenges of the last few years, we continue to serve our neighbors who need the stability and hope that safe and decent housing provides. This would not be possible without your support!

Over our 26-year history, over 1,200 low-and-moderate income families and individuals have improved their lives because of their hard work with us. We remain committed to our mission of bringing people together to build homes, communities and hope.

If you would like more information about Habitat Oakland County projects or programs, please contact me at 248.318.5491 or by email at annd@habitatoakland.org.

You are truly making a difference in our community!

Sincerely,

Ann Duke
Chief Development Officer

Habitat for Humanity is a 501(c)(3) tax exempt organization. No goods or services were received by the donor in exchange for this contribution.

150 Osmun St, Pontiac, Michigan 48342-3125

Phone: (248) 338-1843 Fax (248) 338-1361 www.habitatoakland.org

Q&A Time

Thank you!

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LinkedIn

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You can also sign up to win a raffle prize!

SalesForce: Tips and Tricks for SalesForce Success