Salesforce 101: NAMI 360 Training for States and Affiliates

NAMI 360
Powered by Salesforce
National Alliance on Mental Illness

Liz Norton

Senior Systems Manager, NAMI

Britzel Zuñiga

Salesforce Administrator, NAMI

Elizabeth Monrad

Sr. Associate, Gov. & Membership, NAMI

Heidi Guglielmino

Director, Data Integration, NAMI

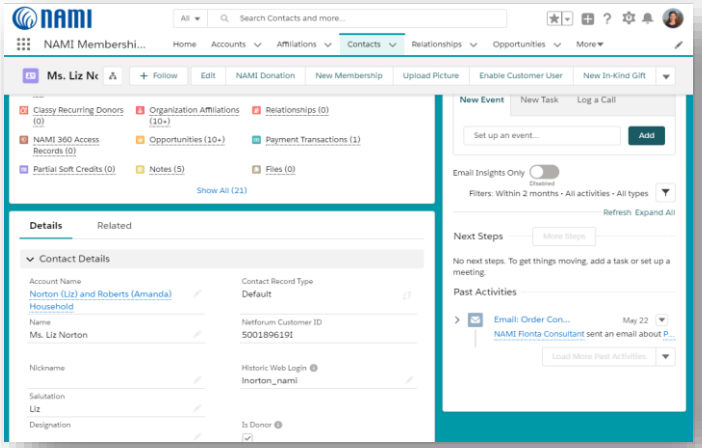
James Stewart

Chief Information Officer, NAMI

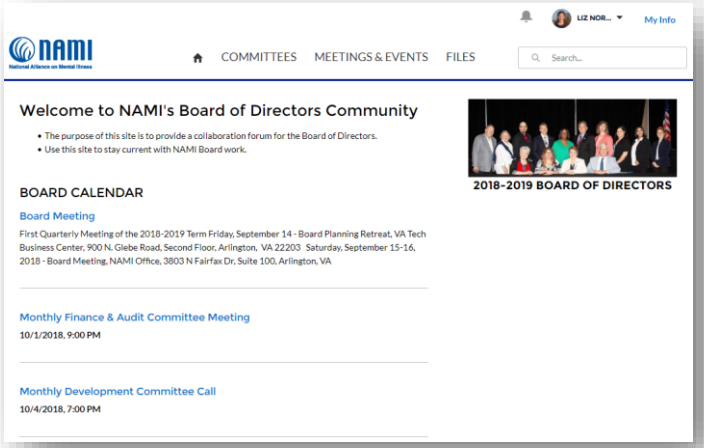
What is Salesforce?

How Does NAMI Use Salesforce?

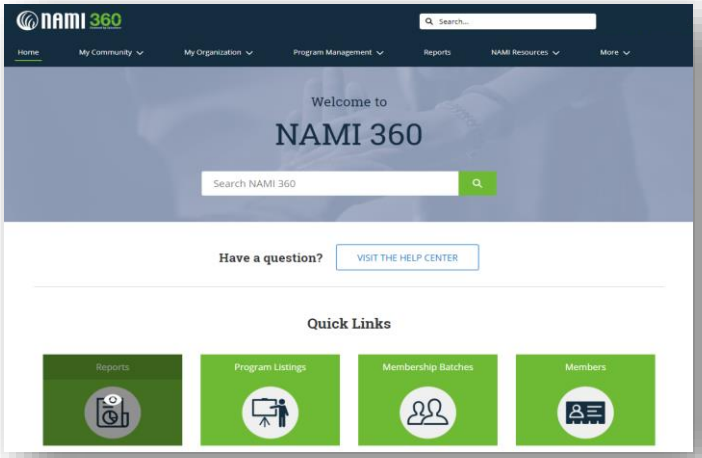
NAMI National



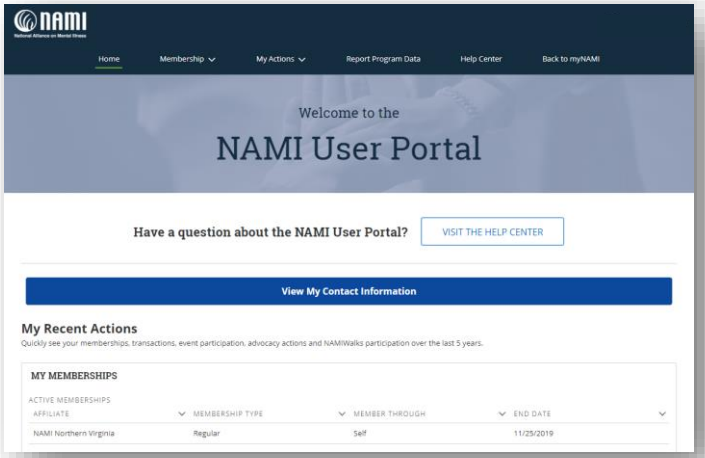
NAMI Board of Directors Community



NAMI 360
Powered by Salesforce



NAMI User Portal

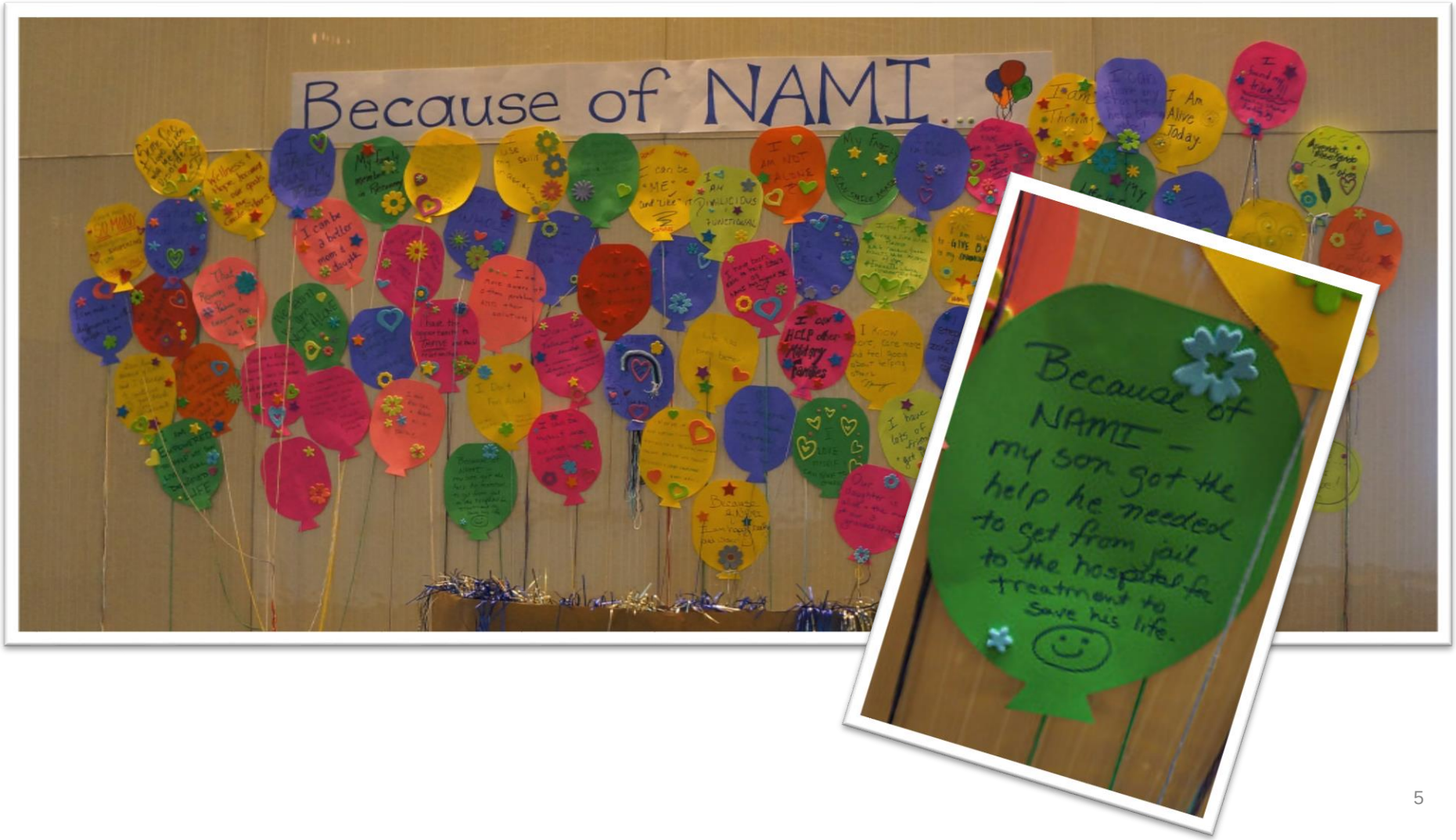


Our Movement. Our Moment.

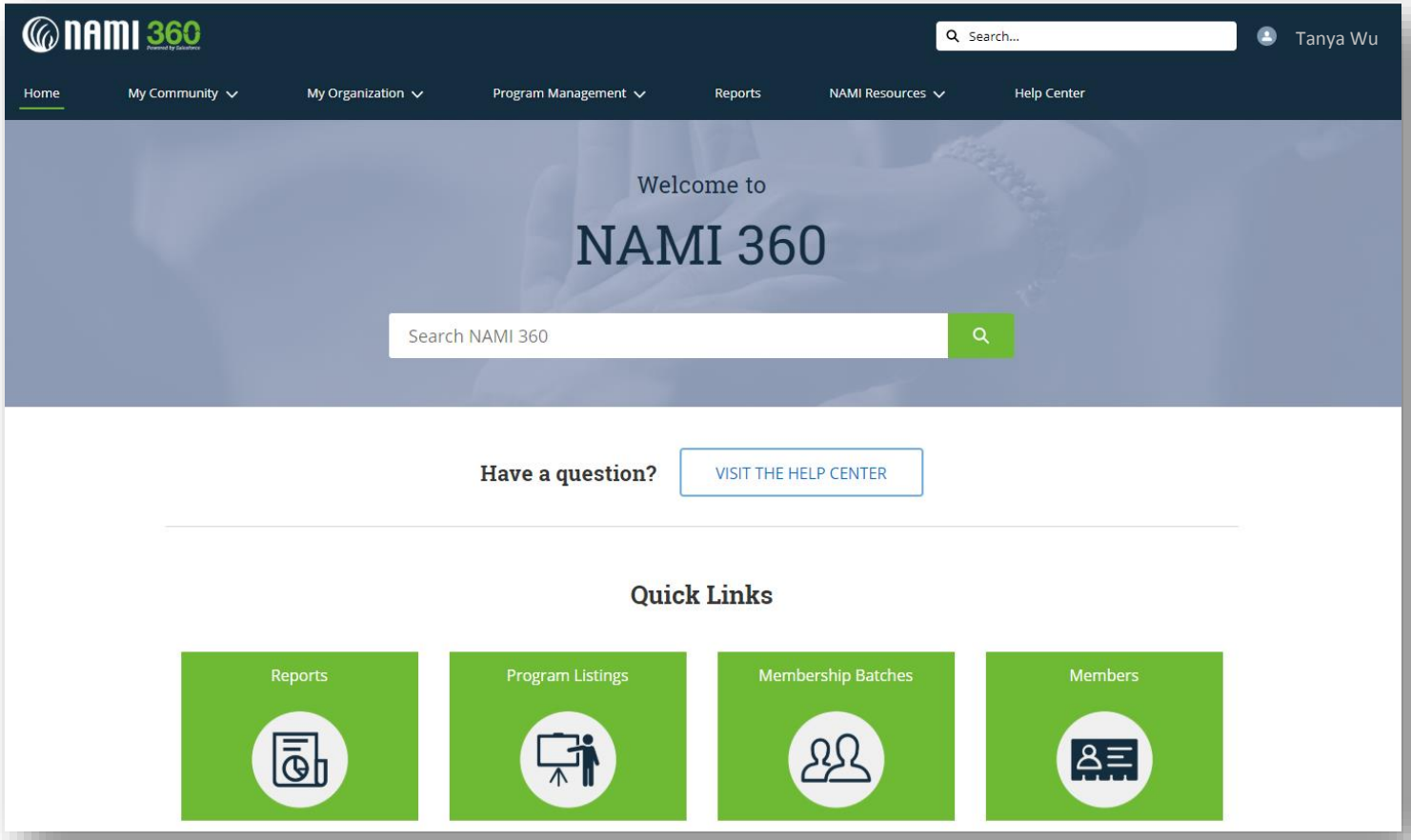
#NAMICon19

2019 NAMI National Convention

JUNE 19–22 • SEATTLE



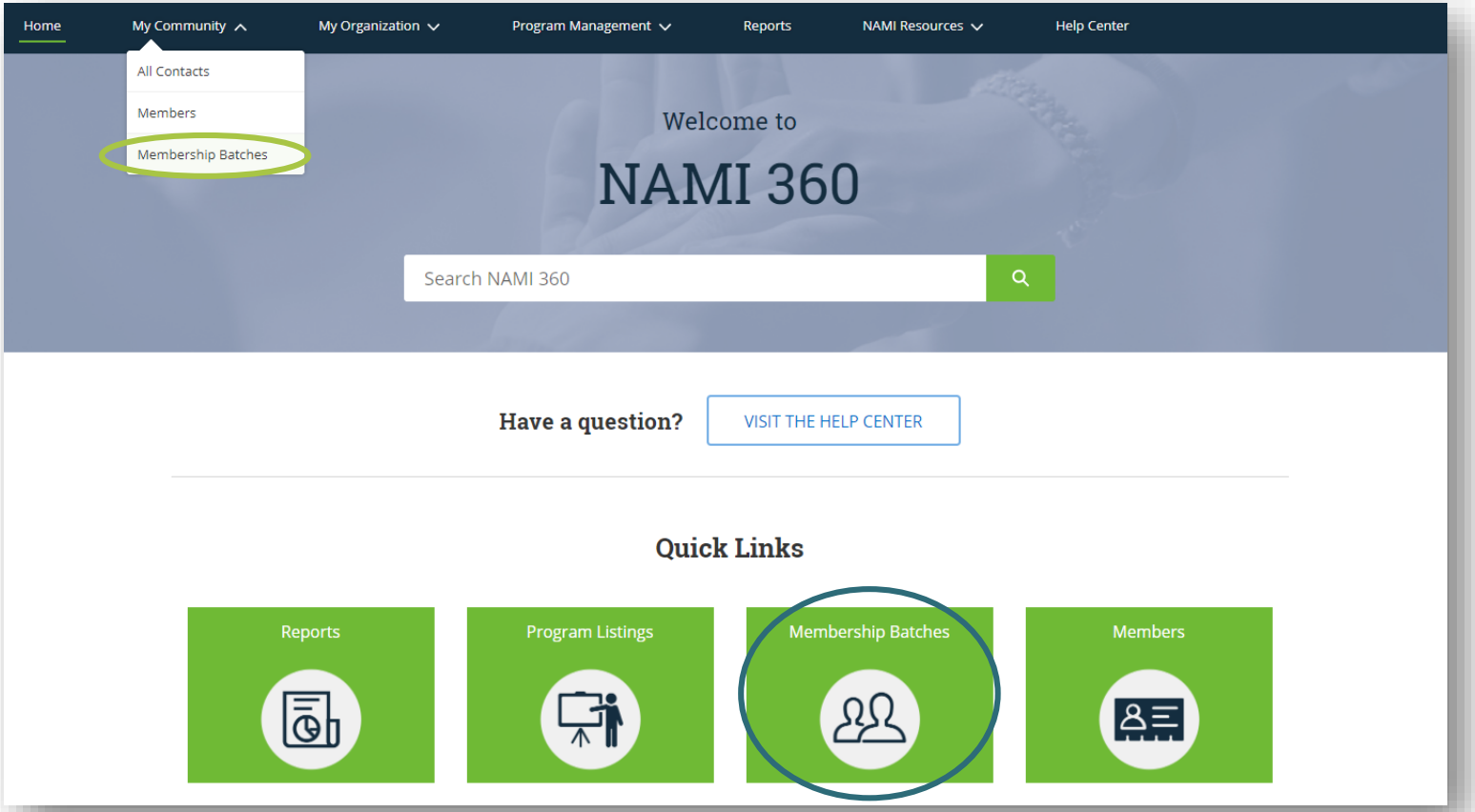
What Can You Do on NAMI 360?



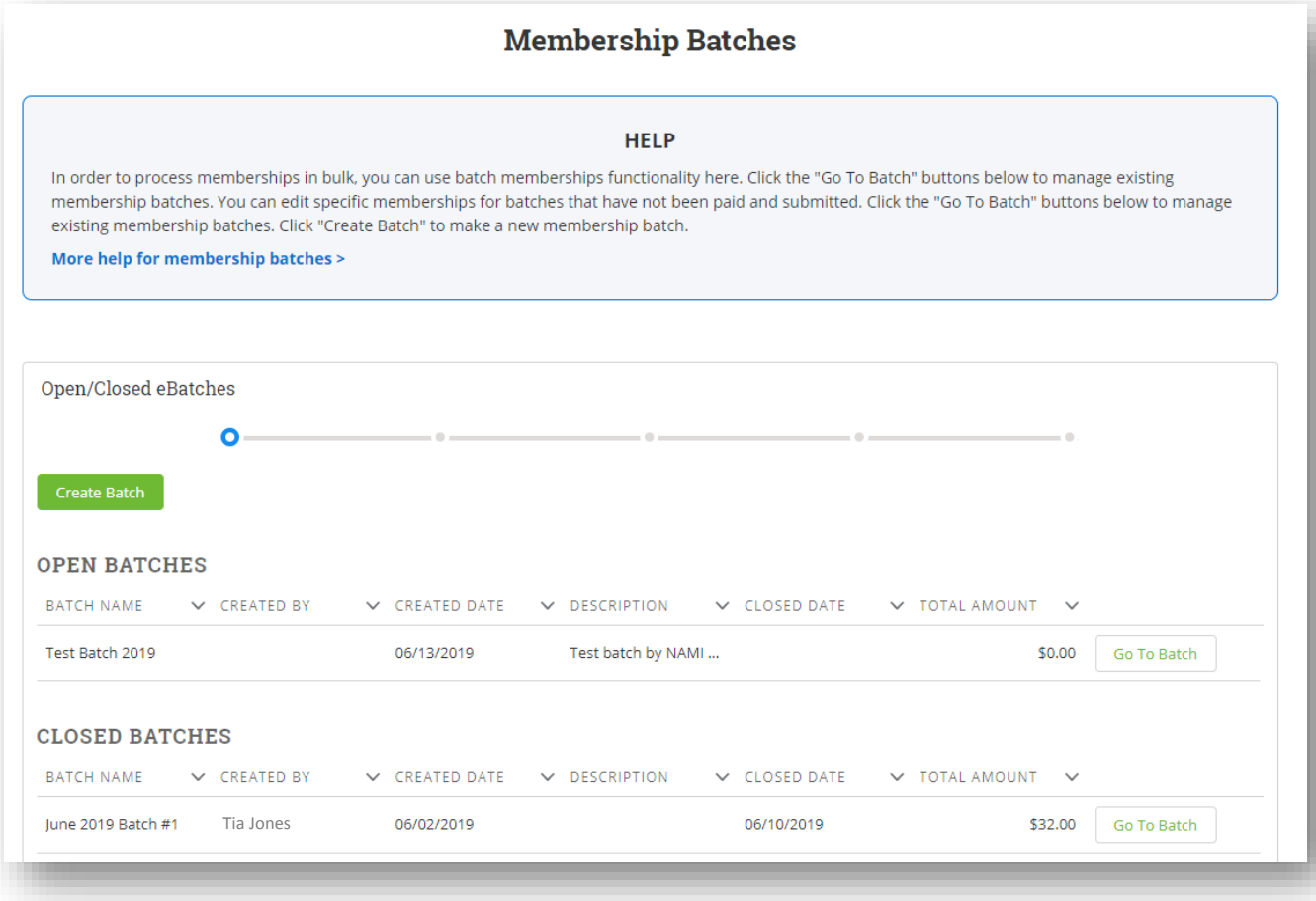
What We're Going to Cover

- Managing Memberships
- Managing Board and Staff
- Managing NAMI 360 Access
- Managing Program Leaders
- Listing/Capturing Program Information
- Reporting Program Data
- Where to learn more about NAMI 360

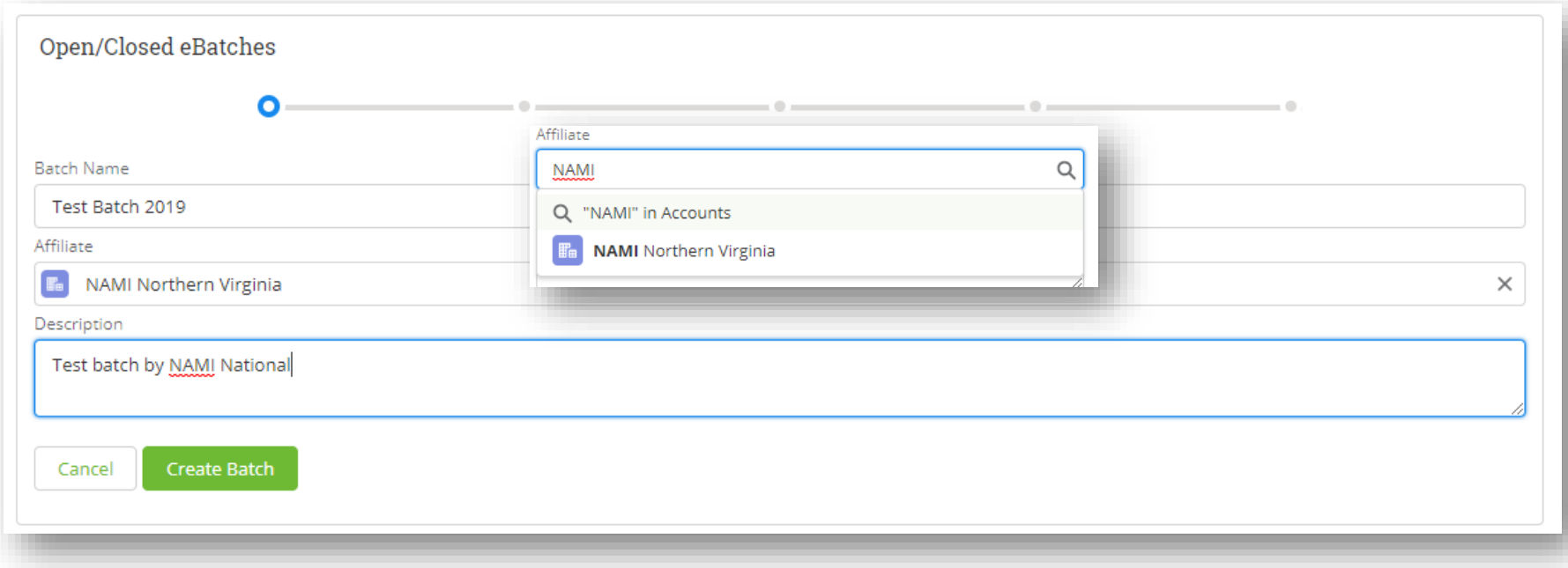
Managing Memberships



Managing Memberships



Managing Memberships



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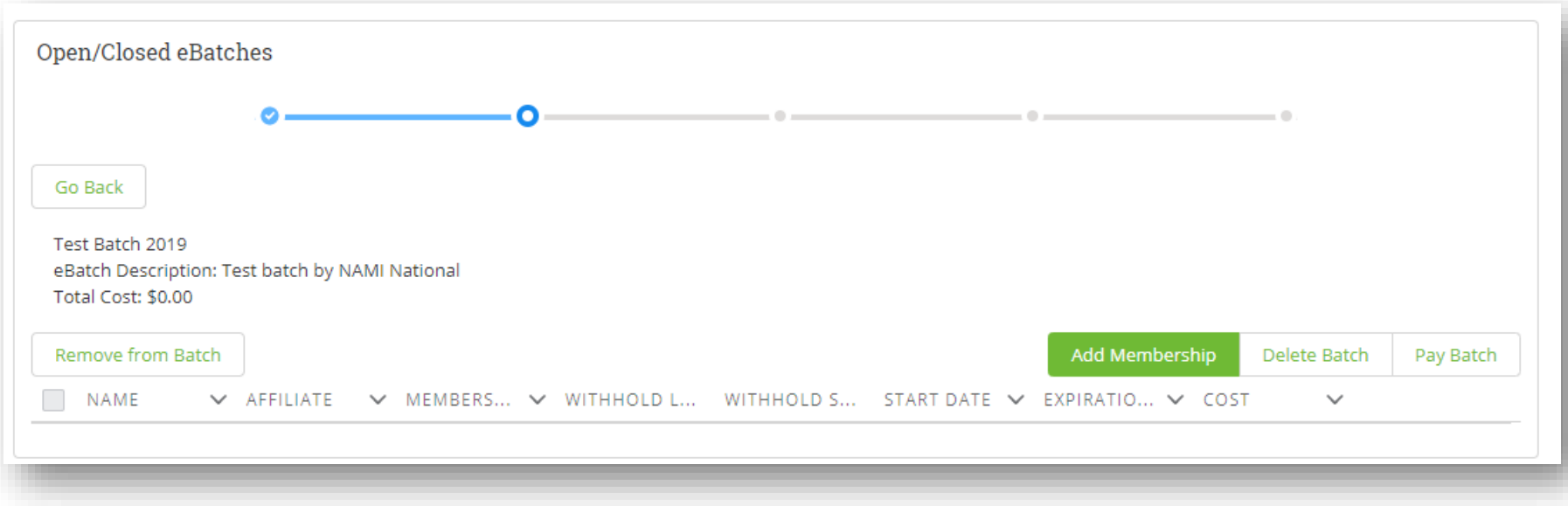

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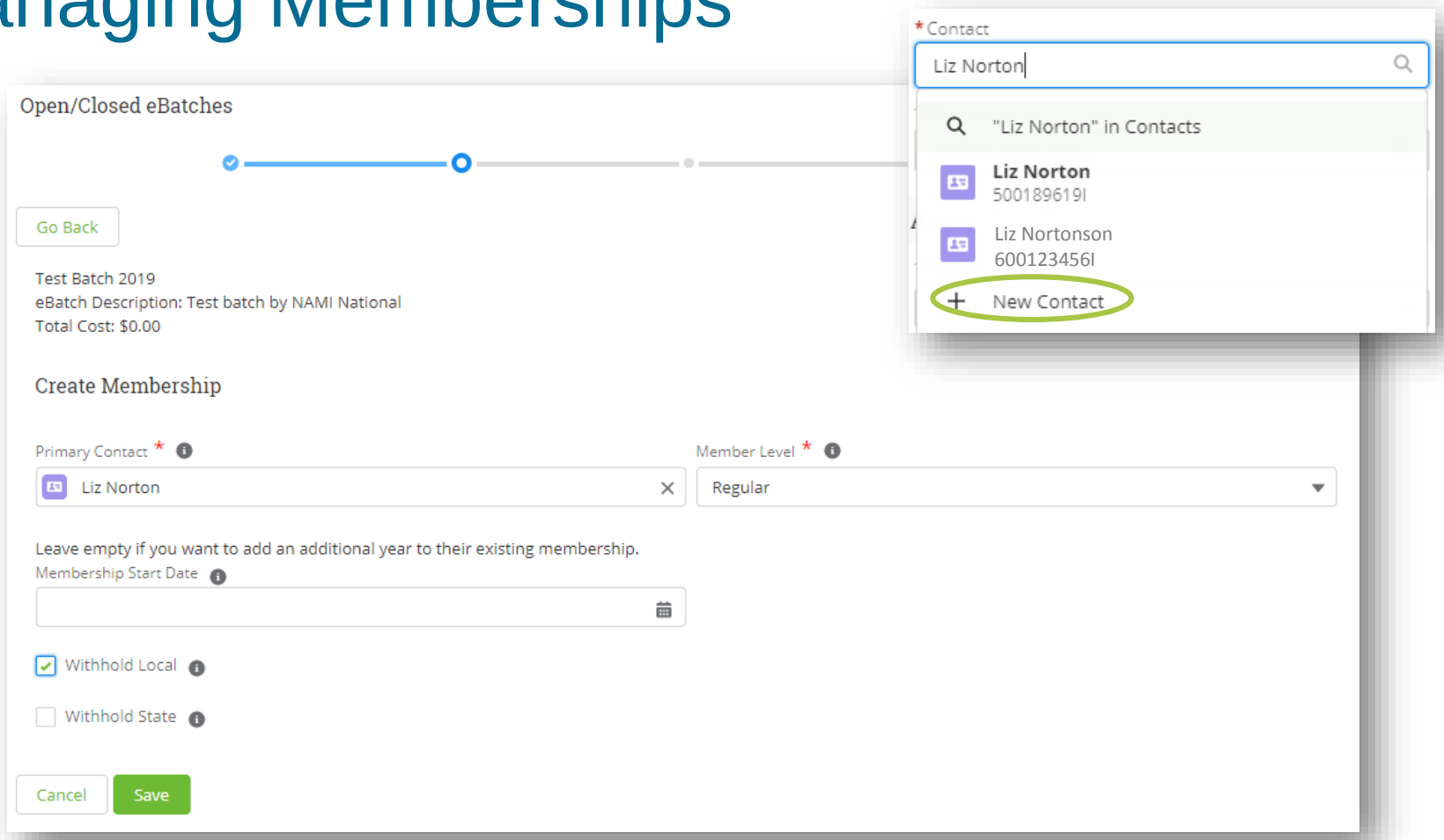

Managing Memberships

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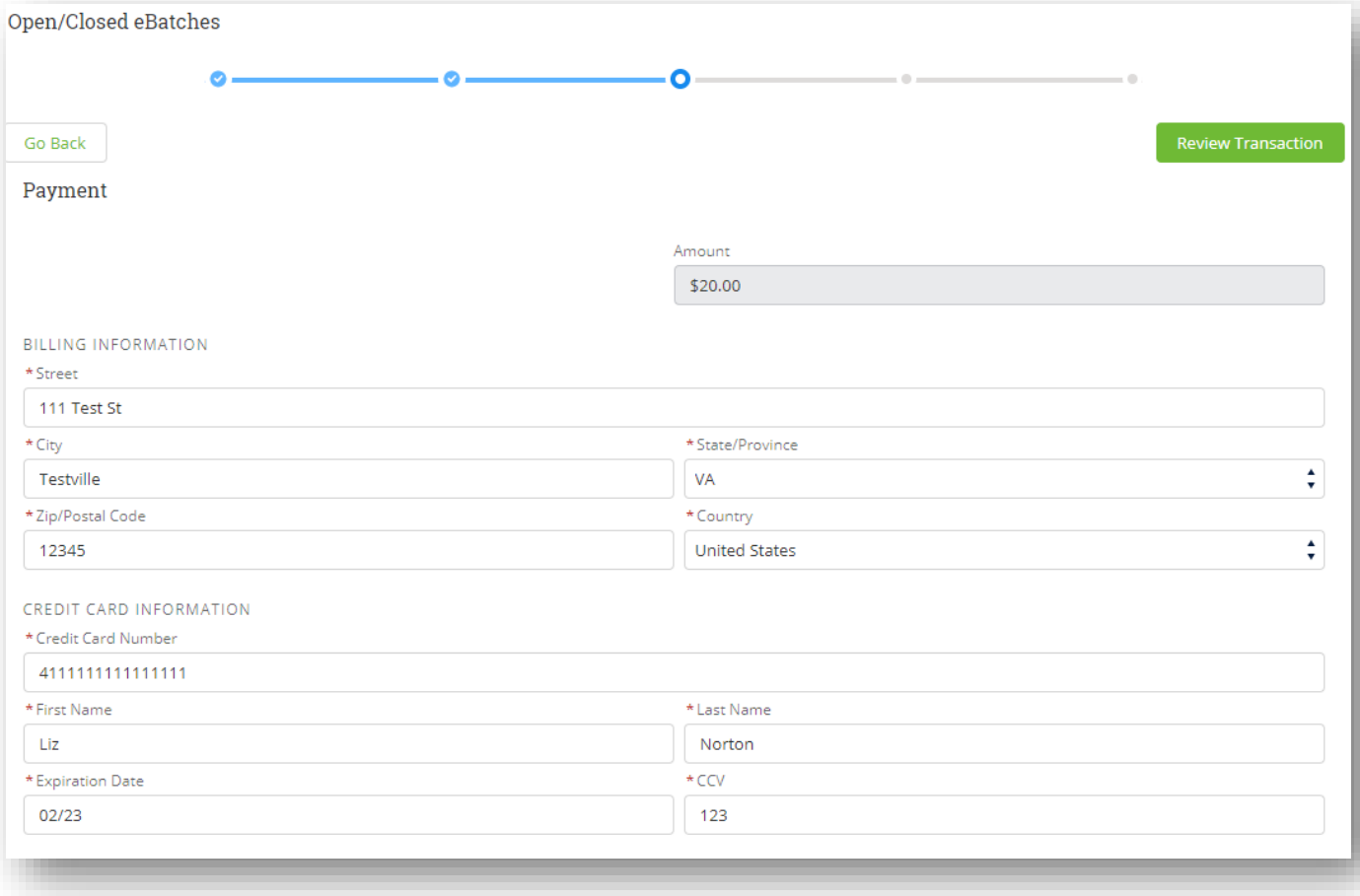
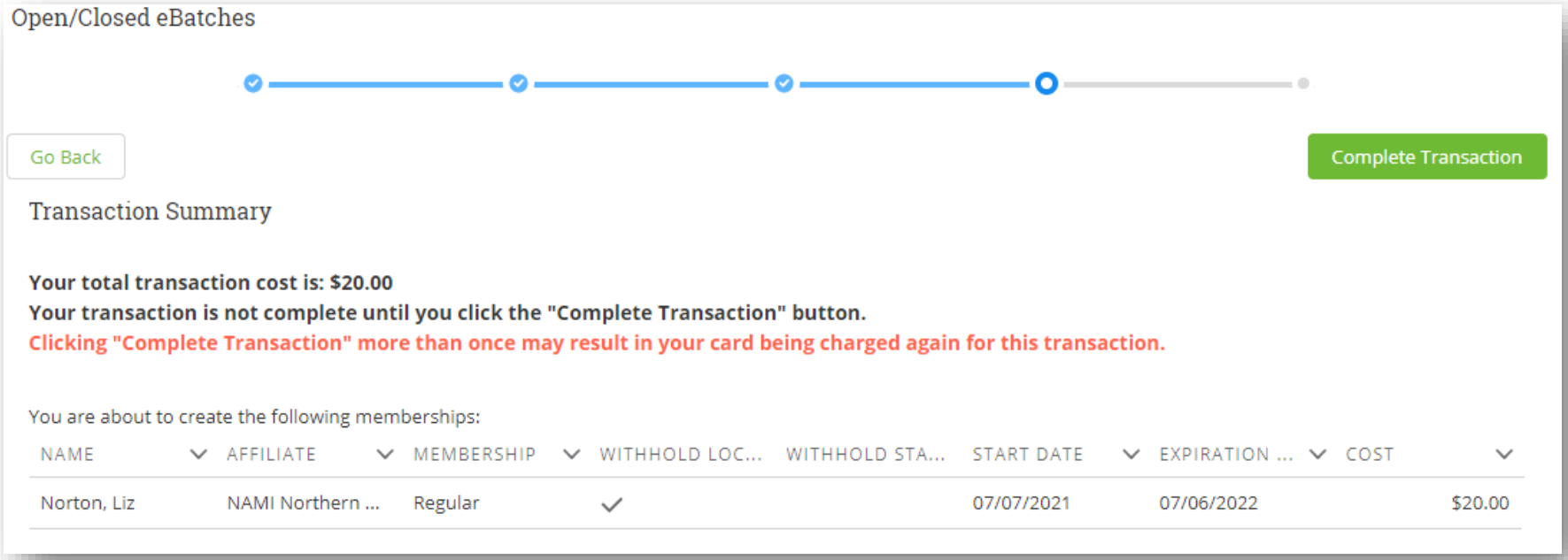
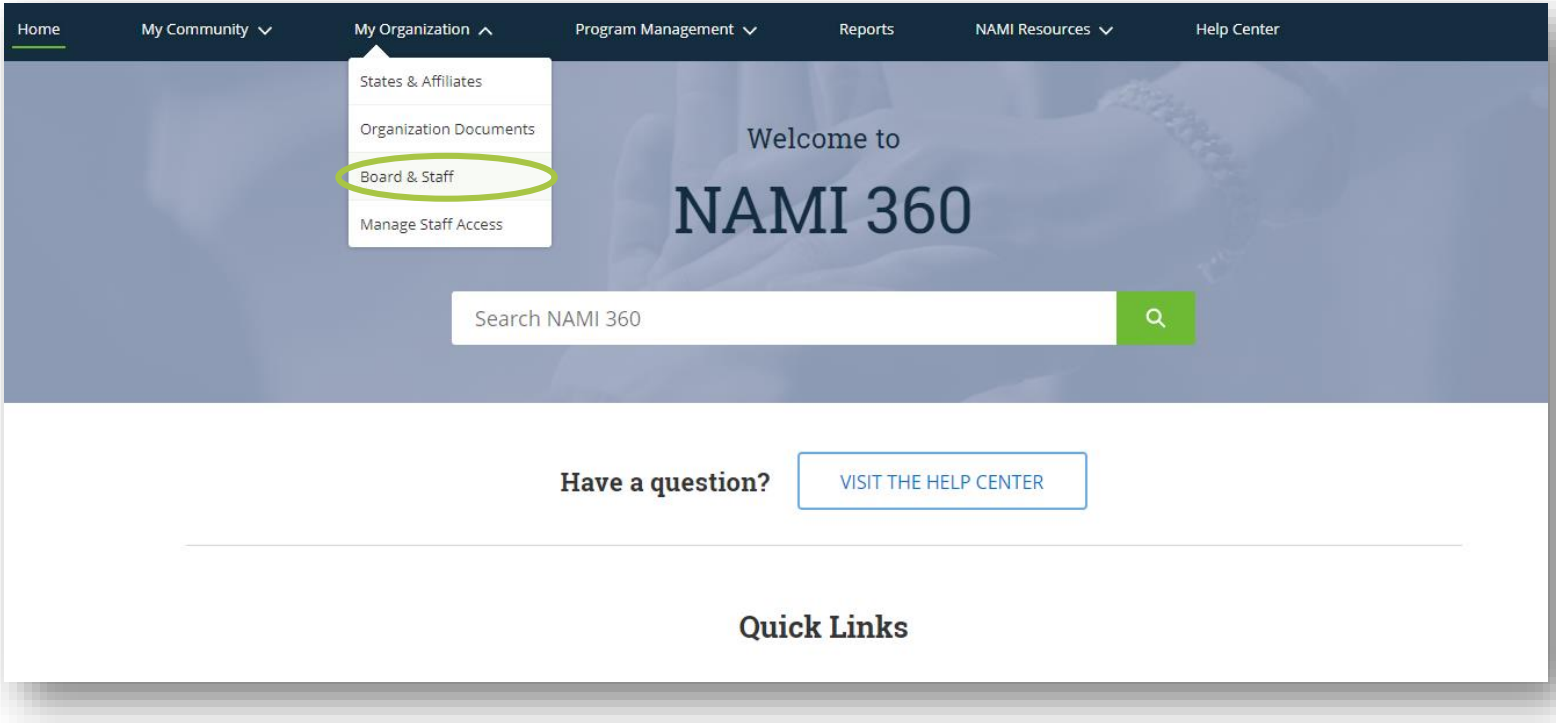


Managing Memberships



Managing Board and Staff



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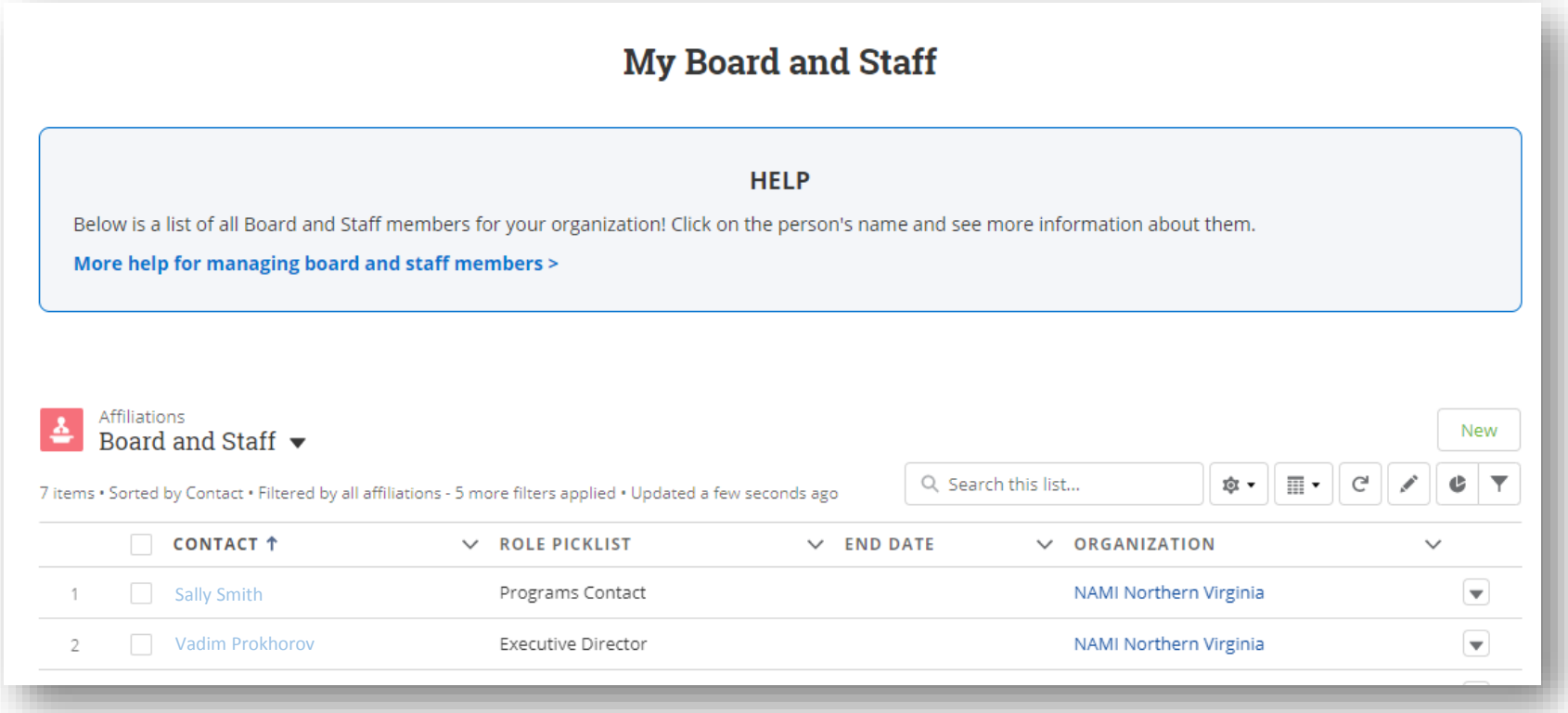

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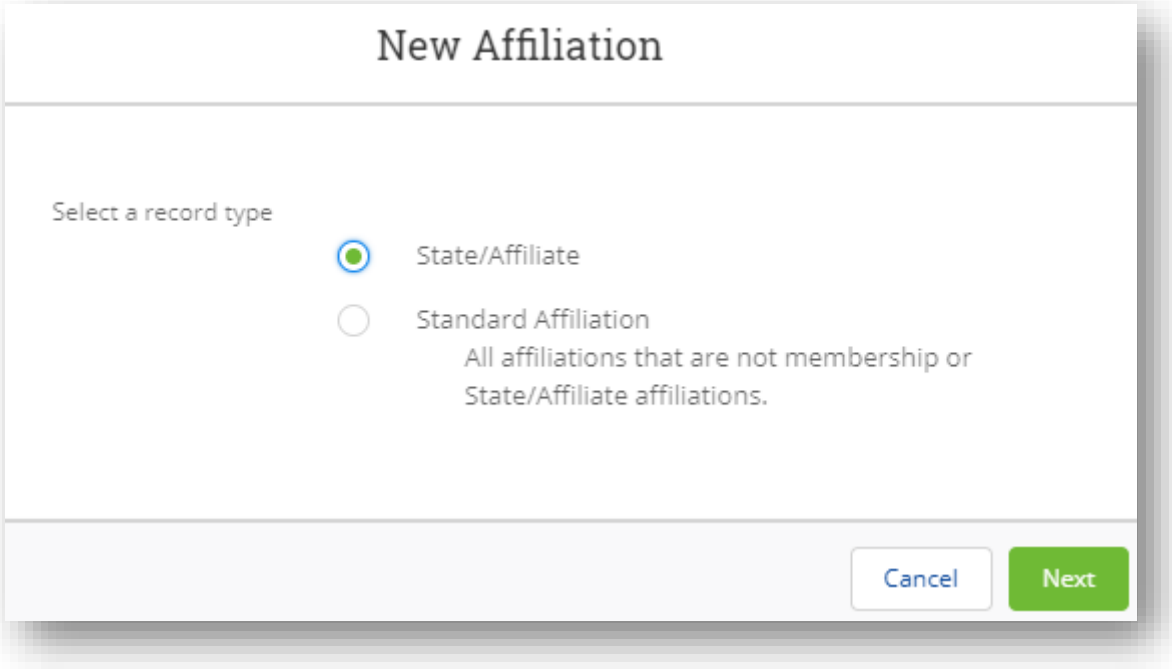
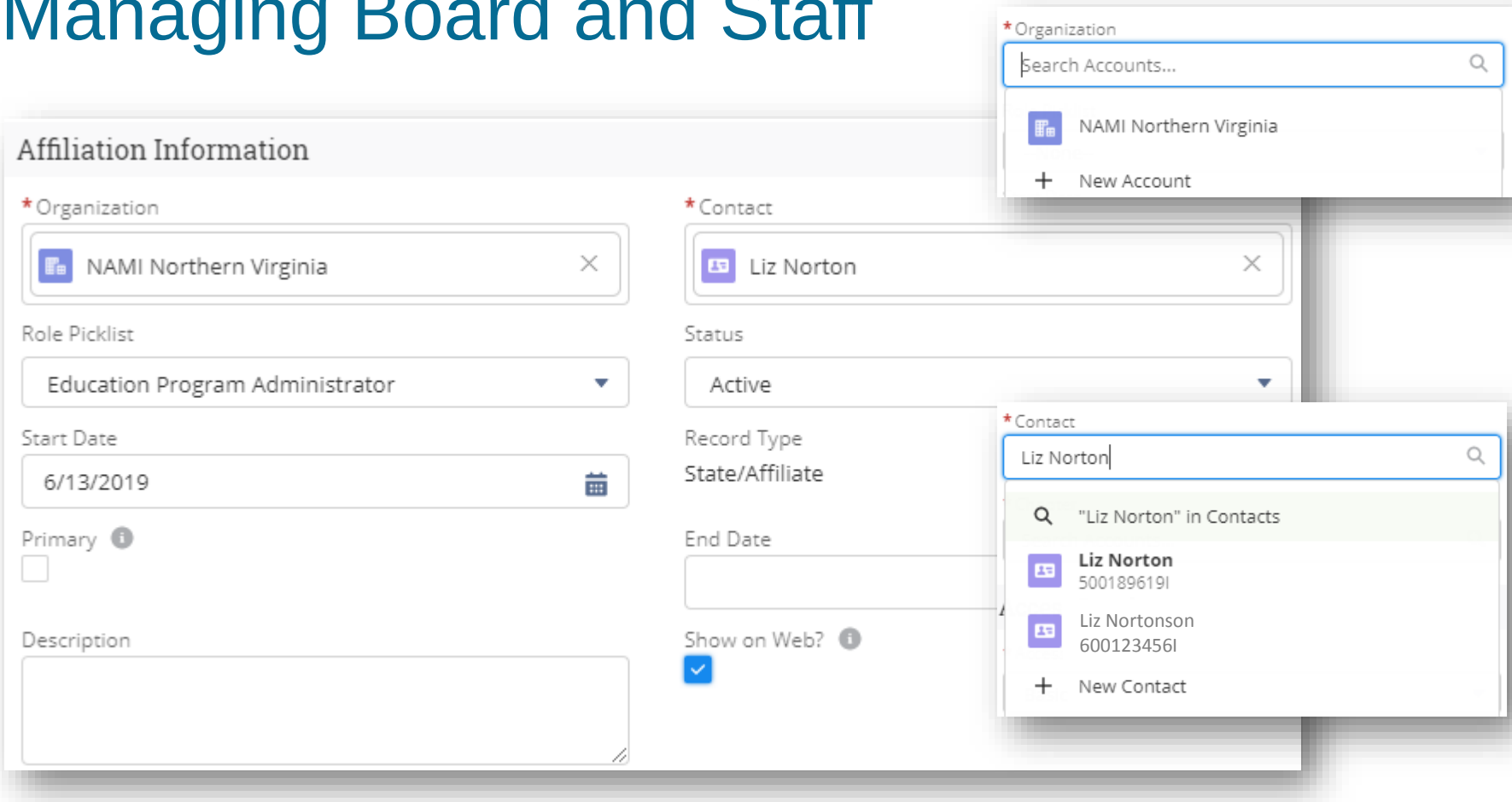
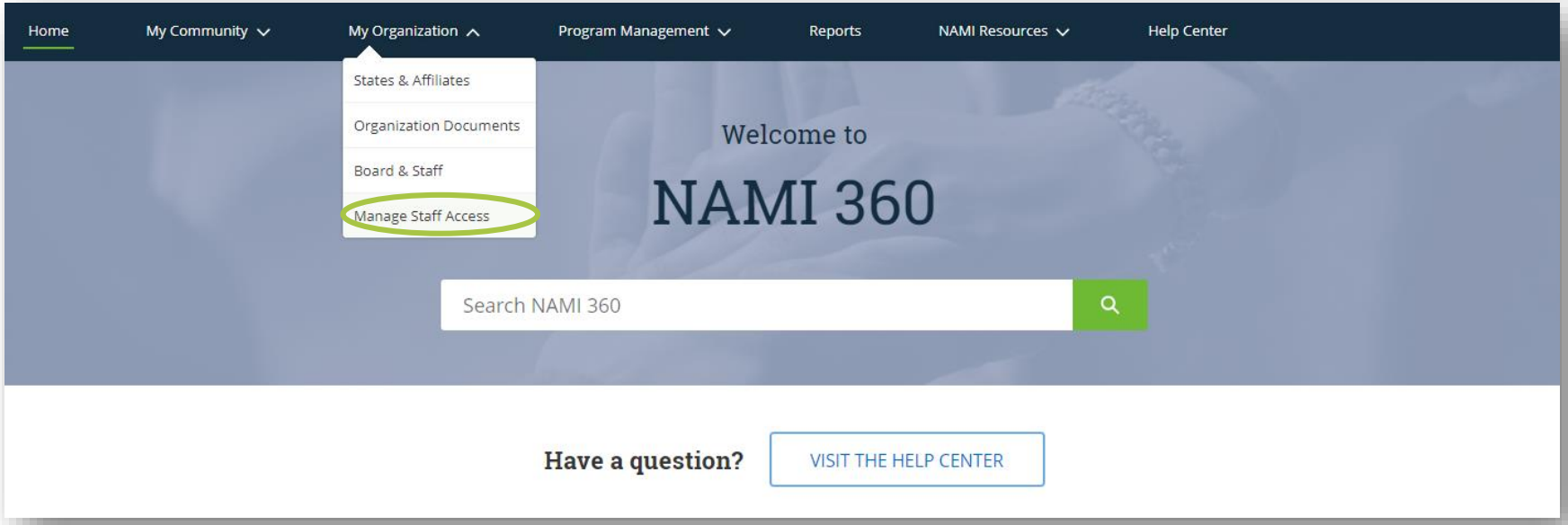


Managing Board and Staff



Managing NAMI 360 Access



Managing NAMI 360 Access

Manage NAMI 360 Access

HELP

Use this page to manage who from your organization(s) can access NAMI 360. This is **separate** from tracking all board and staff at your organization(s) which can be managed on the Board and Staff page.

To **edit** a staff's access to NAMI 360, click on their **NAMI 360 Access Name** (e.g. NAMI360-0008) and select the Edit button.

To **grant new access** to a staff member, click the New button, lookup the contact and add the appropriate permissions.

Permissions:

- **Admin:** User has permissions to add, edit and view all data for their organization(s) in NAMI 360.
- **Basic:** User can see but not edit Contacts, Households and Organization Affiliations
- **Basic + Modular:** Basic access plus full or read-only access to one or more of the following modules: Education, Membership, Affiliations and Organizations
- **No Access:** User has no access to NAMI 360. Assign this permission to a former NAMI 360 user to end their access to the system.

More help for managing staff access >

NAMI 360 Access Records
All Records

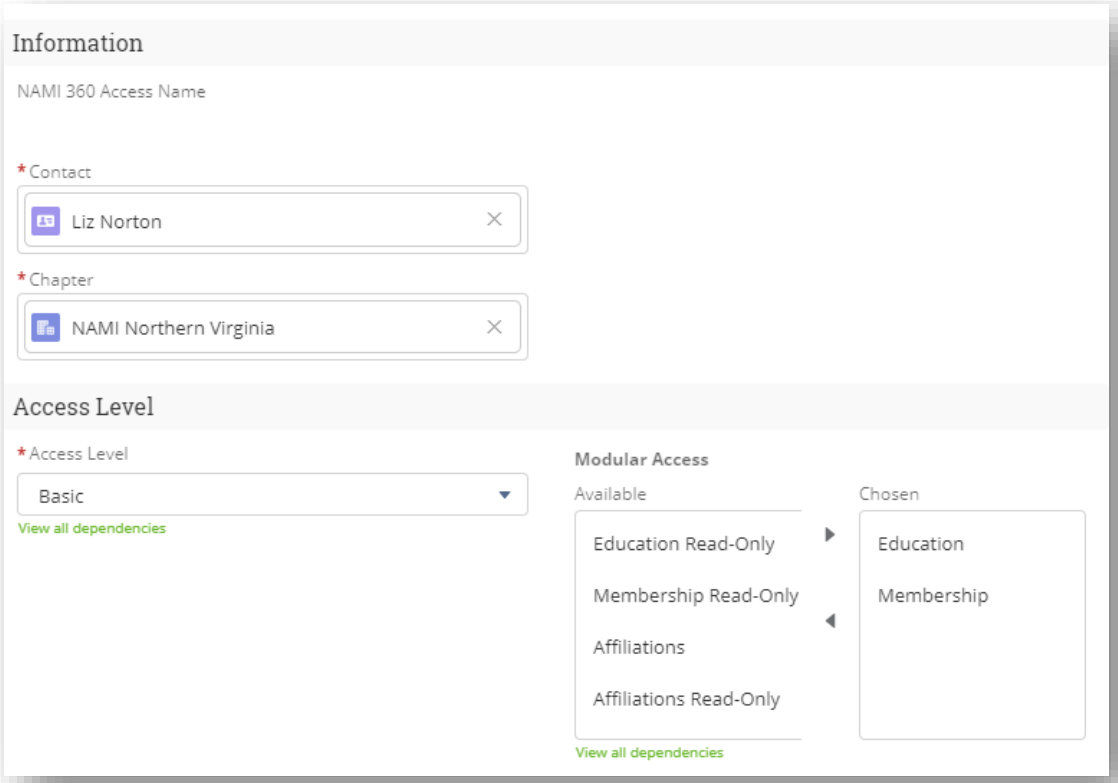
New

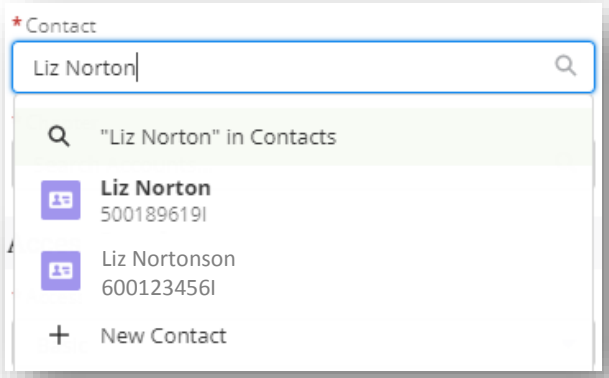
5 items • Sorted by Contact • Filtered by all nami 360 access records • Updated a few seconds ago

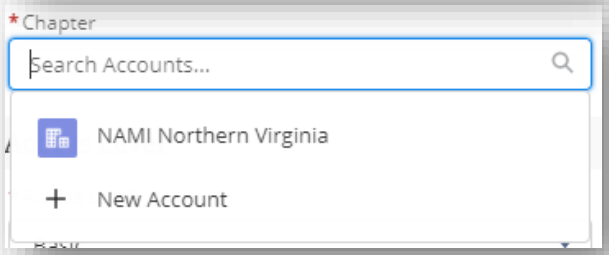
Search this list...

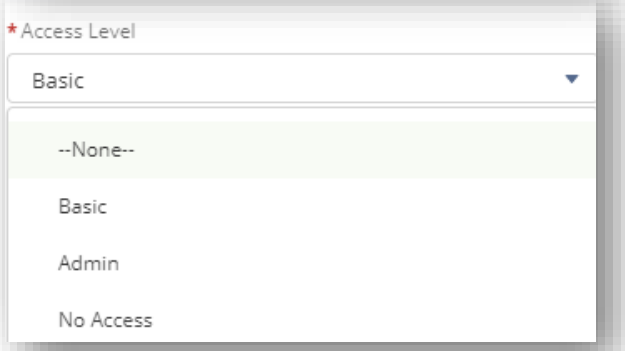
	CONTACT ↑	NAMI 360 ACCESS NAME	CHAPTER	ACCESS LEVEL
1	Sally Smith	NAMI360-0156	NAMI Northern Virginia	Admin
2	Vadim Prokhorov	NAMI360-1064	NAMI Northern Virginia	Admin

Managing NAMI 360 Access

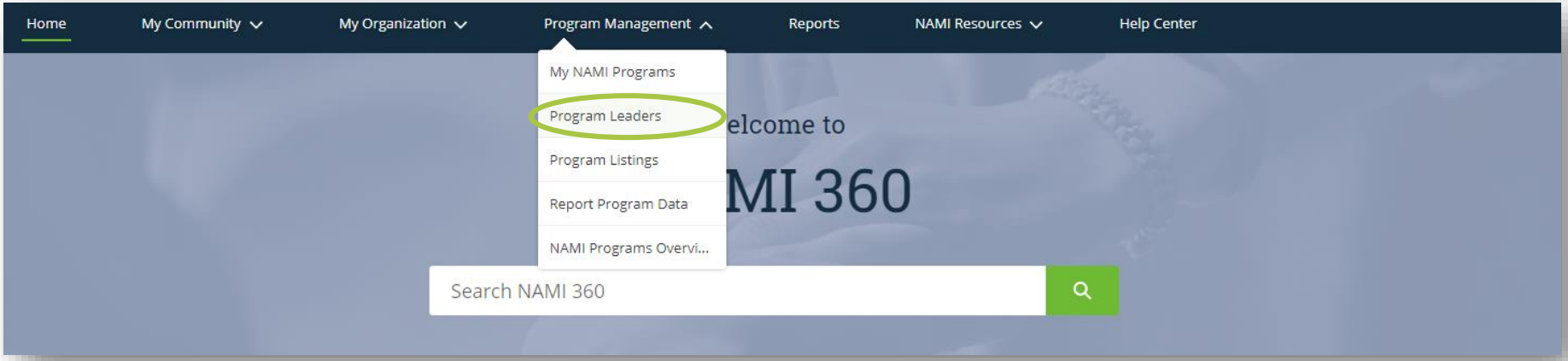








Managing Program Leaders



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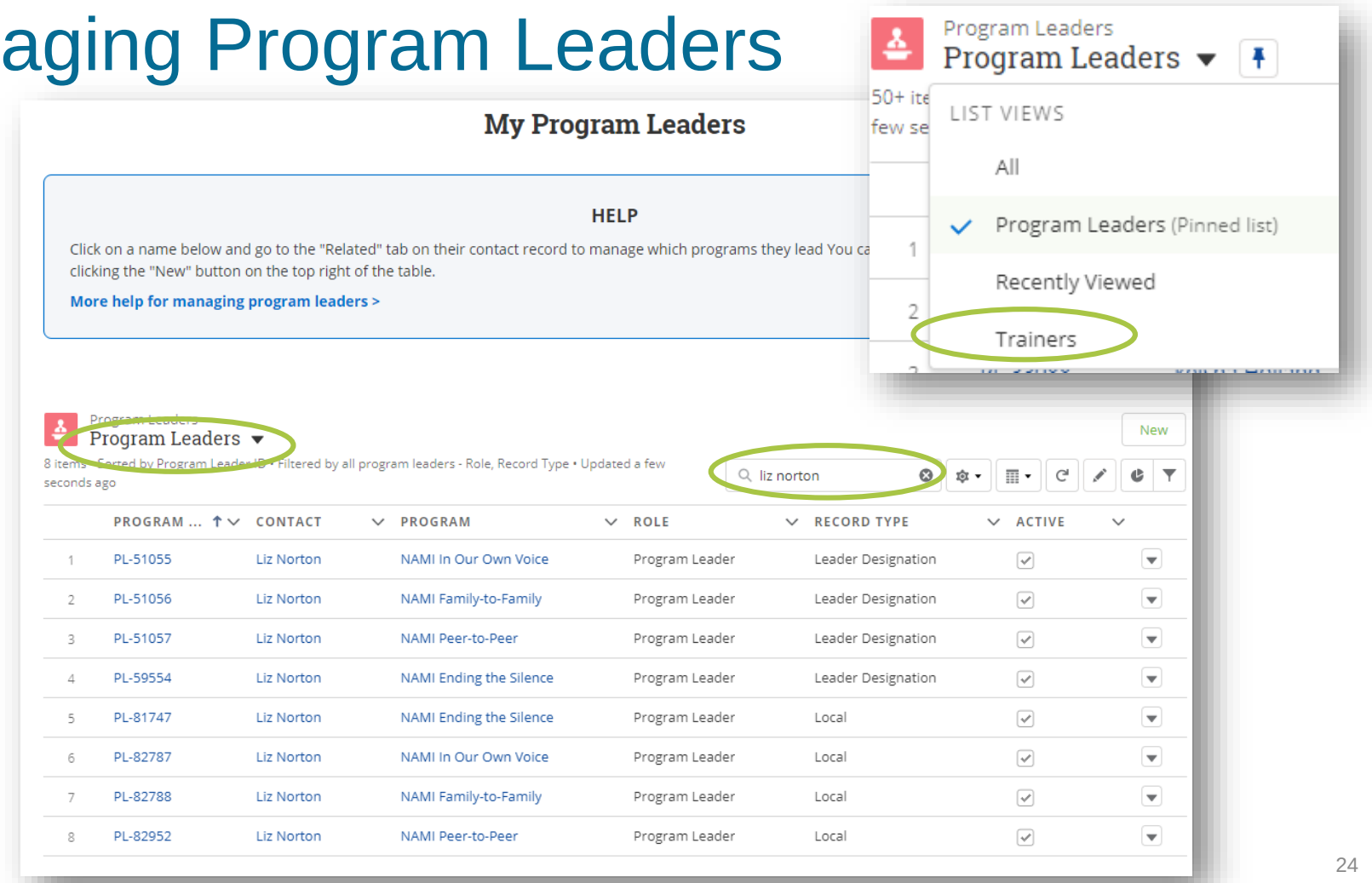

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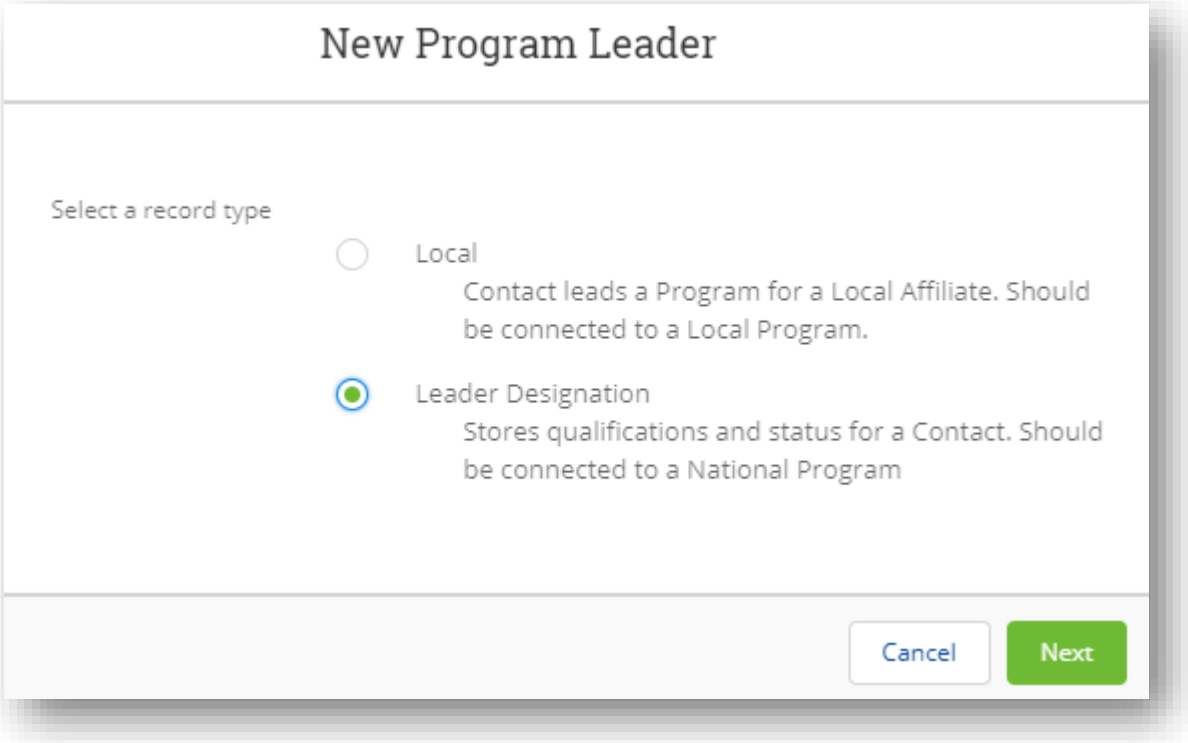

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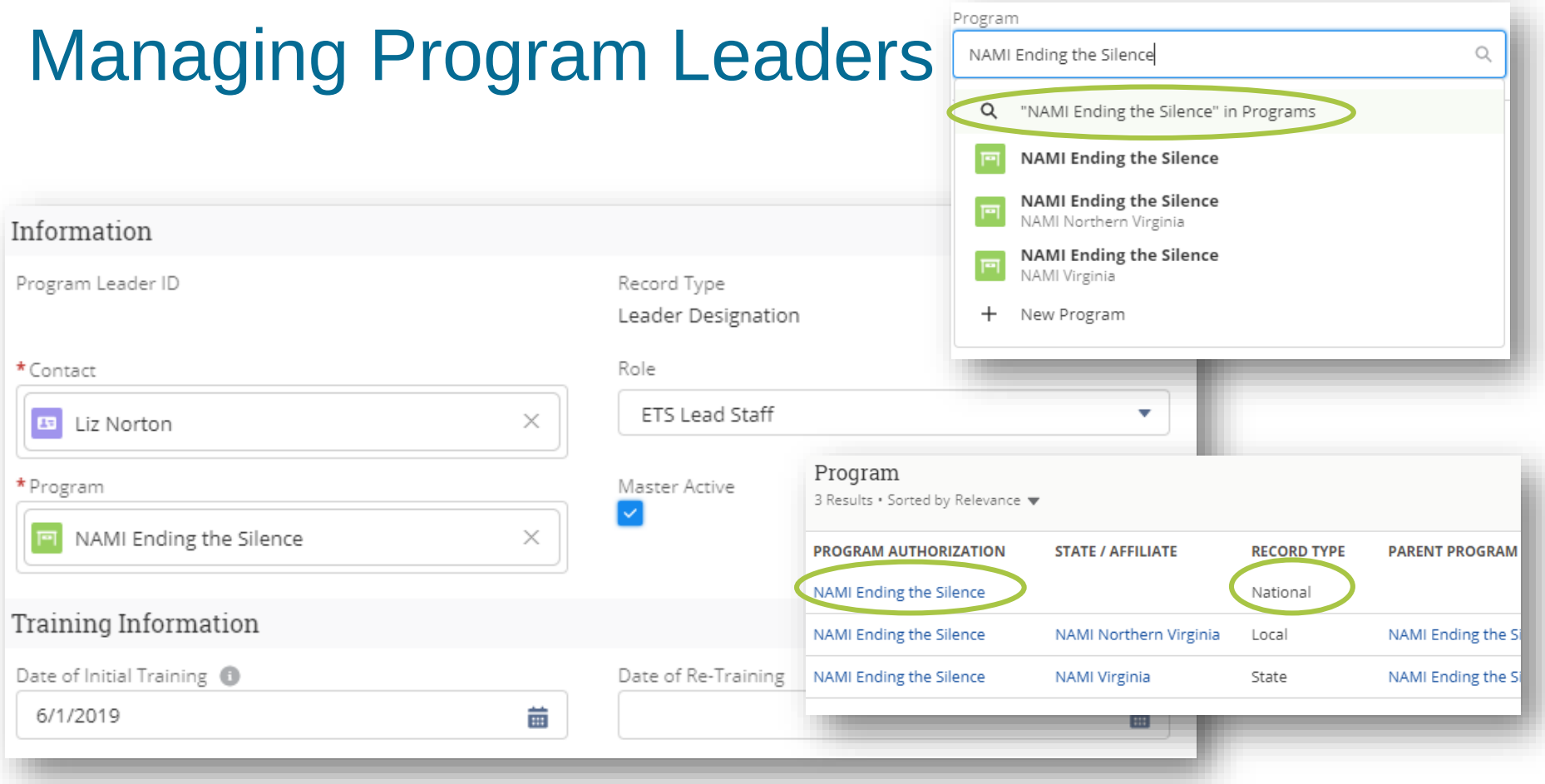

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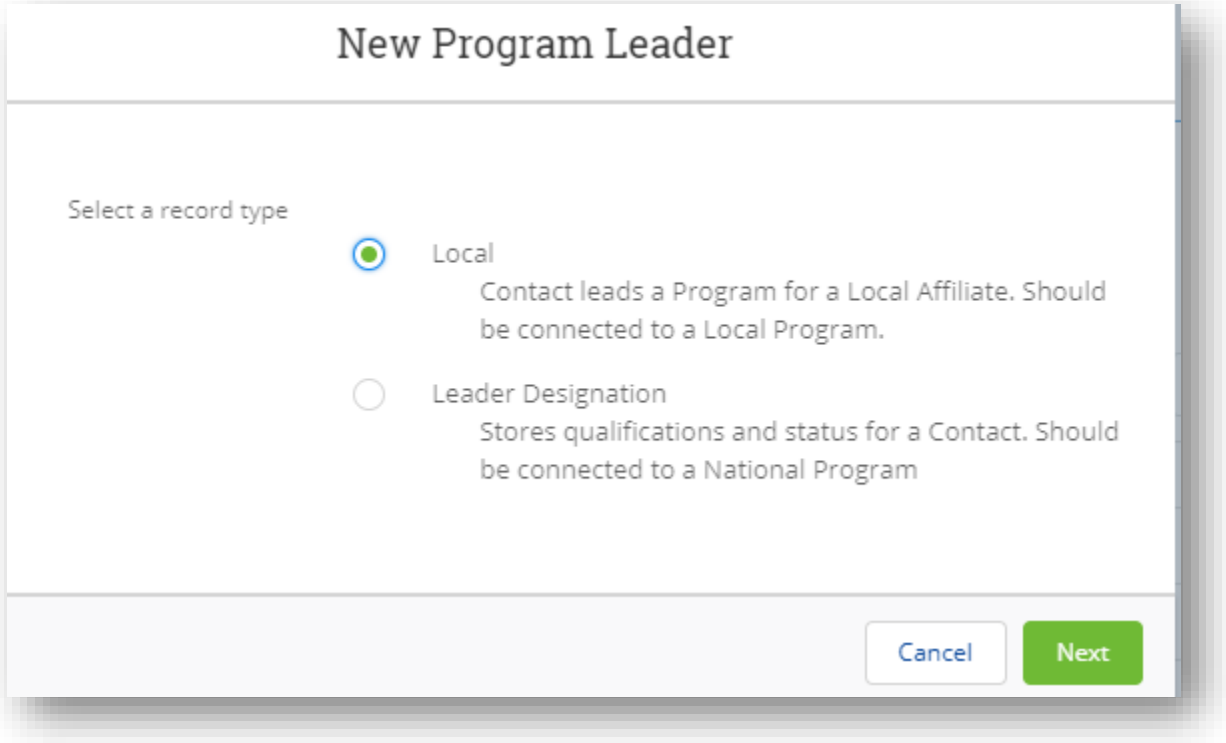

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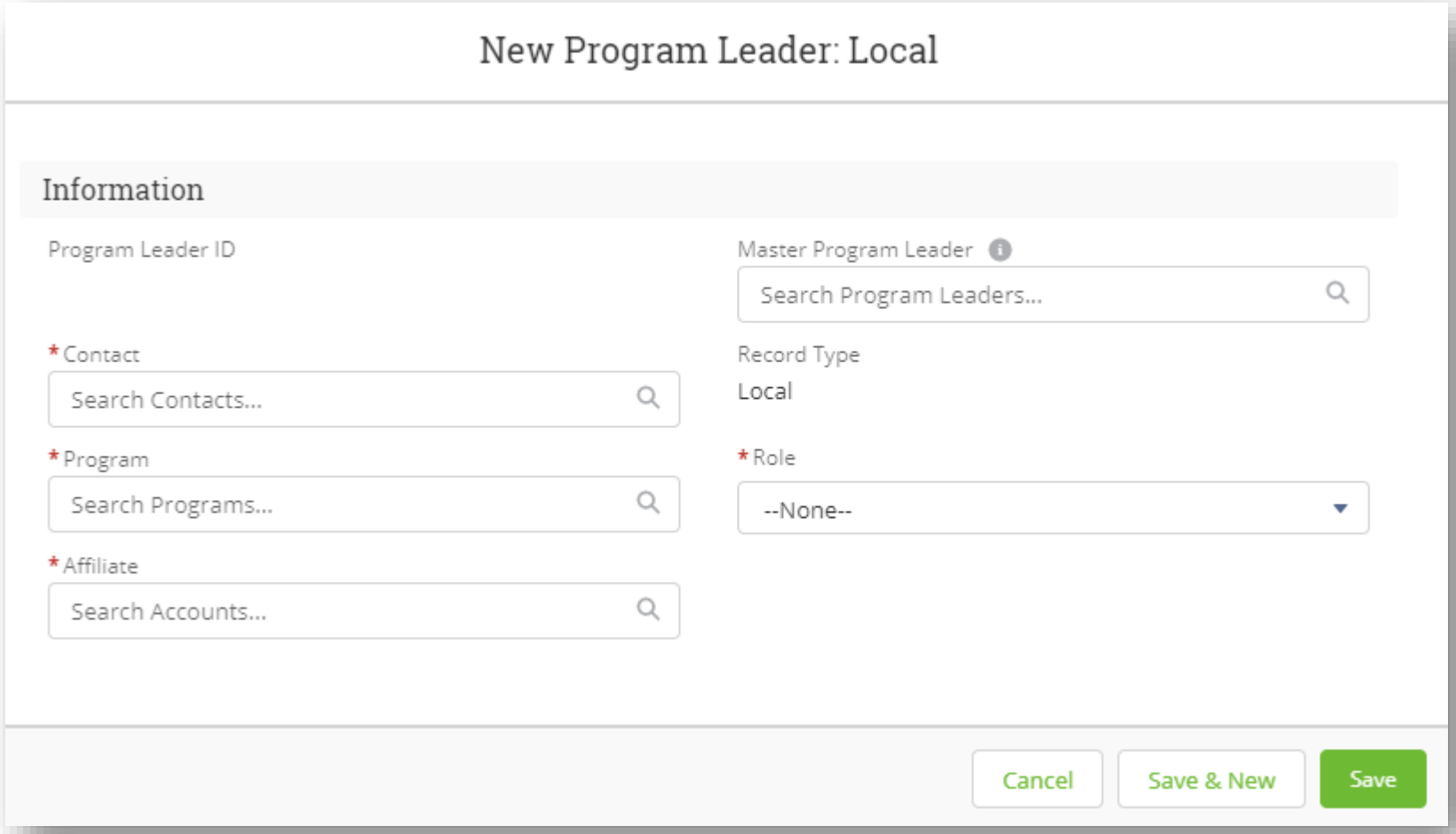

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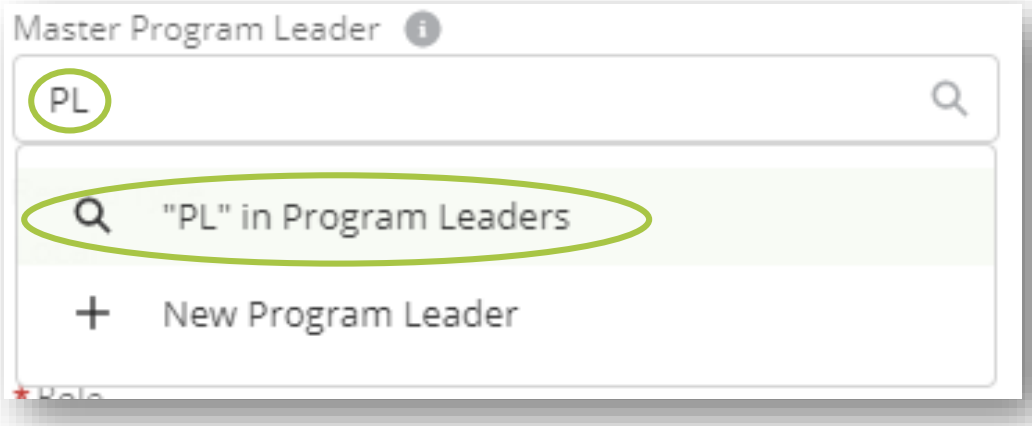
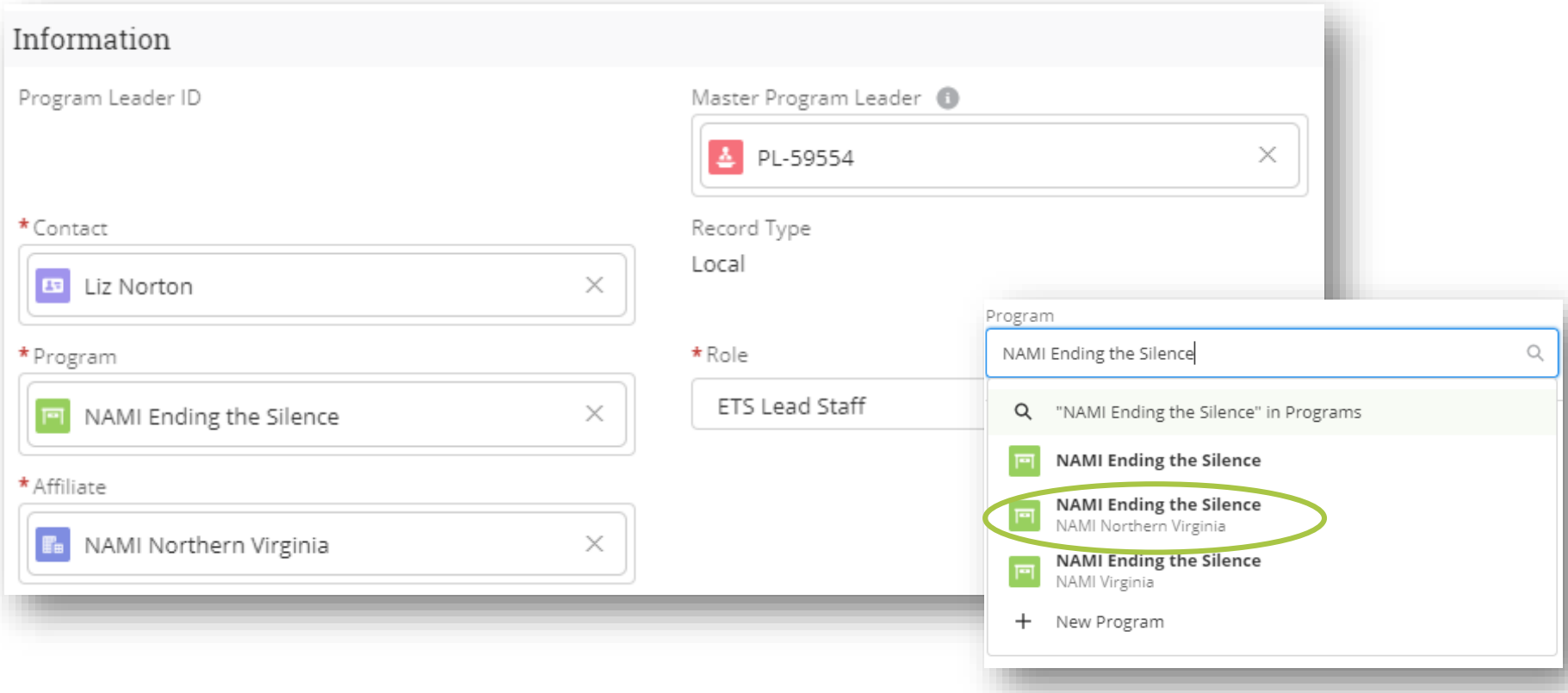


PROGRAM LEADER ID	CONTACT	PROGRAM	RECORD TYPE	ACTIVE
PL-59554	Liz Norton	NAMI Ending the Silence	Leader Designation	☑
PL-51057	Liz Norton	NAMI Peer-to-Peer	Leader Designation	☑
PL-51056	Liz Norton	NAMI Family-to-Family	Leader Designation	☑
PL-51055	Liz Norton	NAMI In Our Own Voice	Leader Designation	☑

Managing Program Leaders



Listing/Capturing Program Information

Education, Training And Programs

Program	Dates	Location	Details & Registration
Grupo de Apoyo para Familiares de NAMI	11/13/2017 Meets every 2nd and 4th Monday at 7:00 PM.	Houston 77079	Details & Registration
Grupo de Apoyo para Familiares de NAMI	11/13/2017 Meets every 2nd and 4th Monday at 7:00 PM.	Houston 77079	Det Reg
Grupo de Apoyo para Familiares de NAMI	11/13/2017 Meets every 2nd and 4th Monday at 7:00 PM.	Houston 77079	Det Reg

There are more programs scheduled! See **NAMI Greater Houston's** full program list.

NAMI Texas — NAMI Greater Houston

Dates

November 13, 2017
Meets every 2nd and 4th Monday at 7:00 PM.

Location

Memorial Drive United Methodist Church
12955 Memorial Drive
Houston 77079

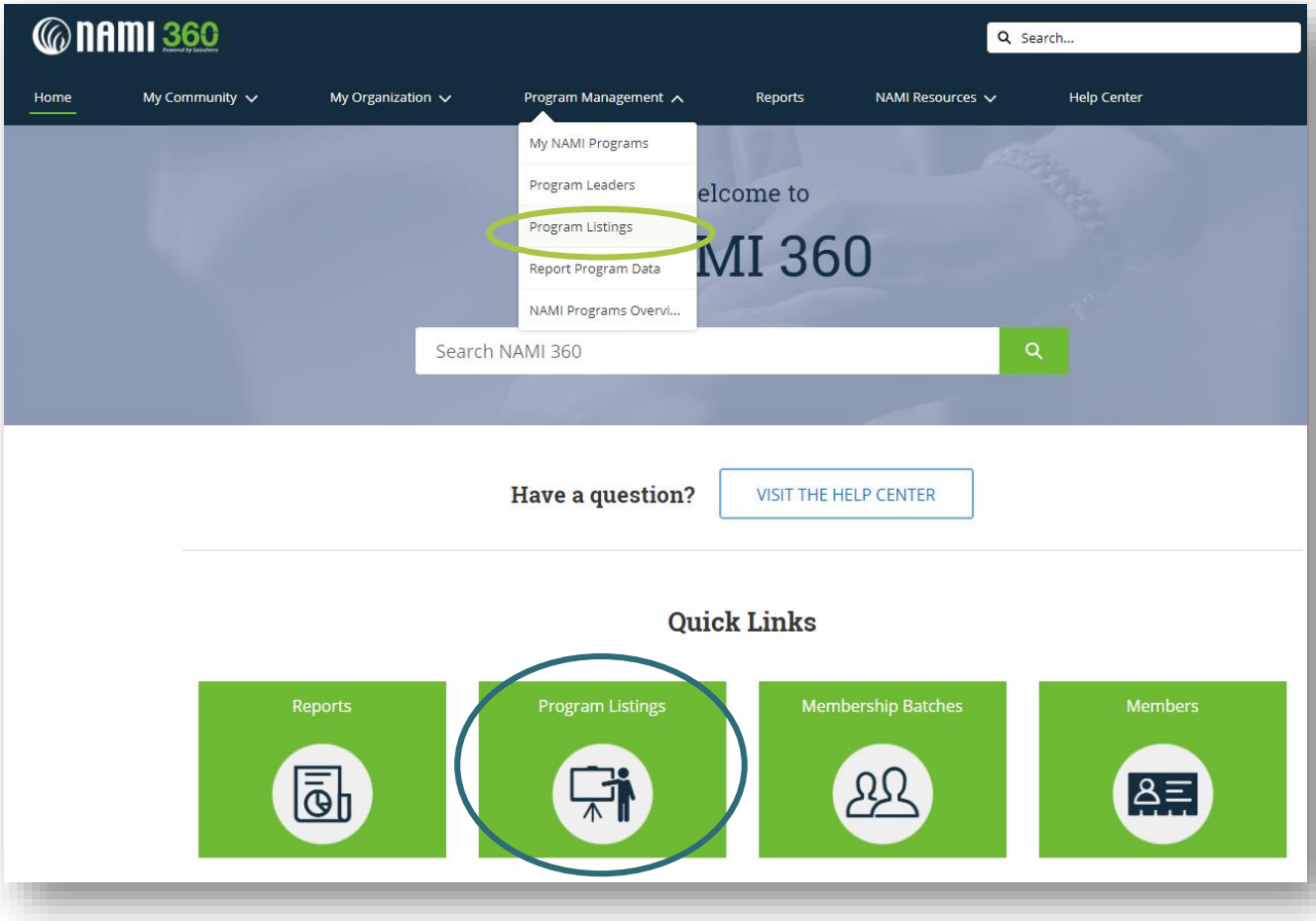
Contact Information

Liz del valle Garcia
Family Support Group Facilitator (Spanish)

http://www.namigreaterhouston.org

No registration required. All family members and caregivers of a person living with mental illness are welcome. Please contact the Facilitator to inform that you plan to attend. Thank you.

Listing/Capturing Program Information



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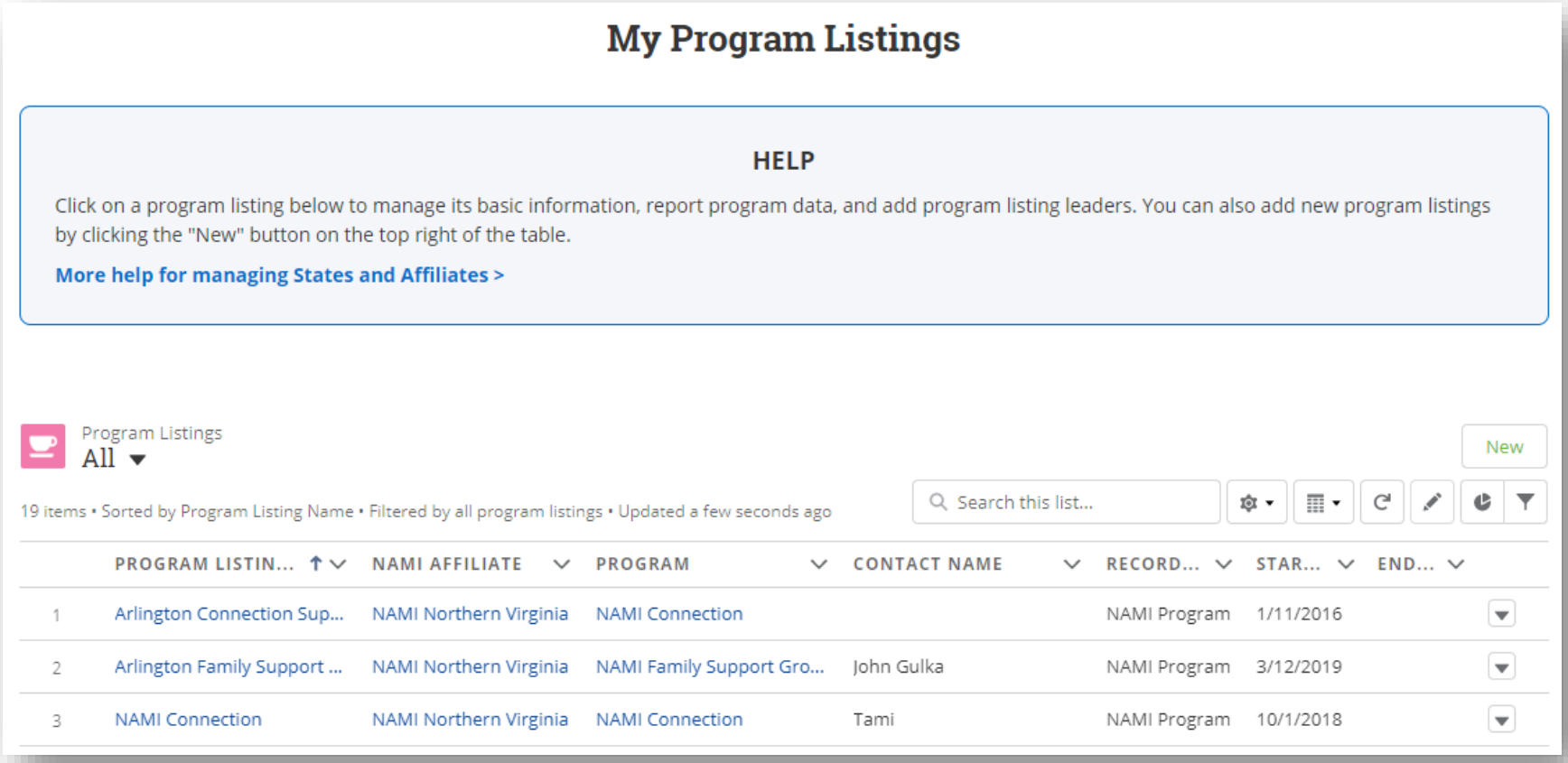


My Program Listings

HELP

Click on a program listing below to manage its basic information, report program data, and add program listing leaders. You can also add new program listings by clicking the "New" button on the top right of the table.

More help for managing States and Affiliates >

Program Listings
All

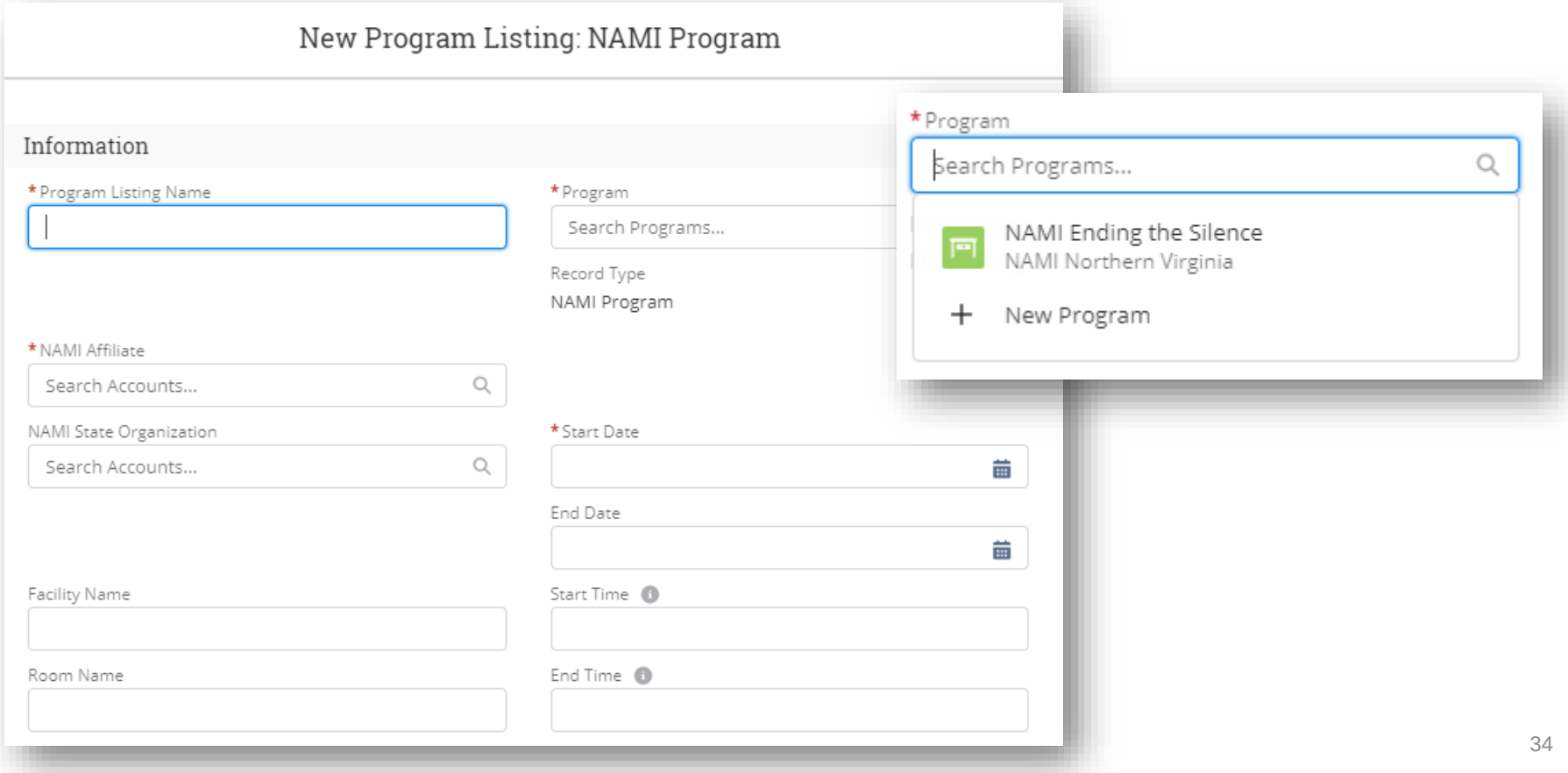
New

19 items • Sorted by Program Listing Name • Filtered by all program listings • Updated a few seconds ago

Search this list...

	PROGRAM LISTIN...	NAMI AFFILIATE	PROGRAM	CONTACT NAME	RECORD...	STAR...	END...
1	Arlington Connection Sup...	NAMI Northern Virginia	NAMI Connection		NAMI Program	1/11/2016	
2	Arlington Family Support ...	NAMI Northern Virginia	NAMI Family Support Gro...	John Gulka	NAMI Program	3/12/2019	
3	NAMI Connection	NAMI Northern Virginia	NAMI Connection	Tami	NAMI Program	10/1/2018	

Listing/Capturing Program Information



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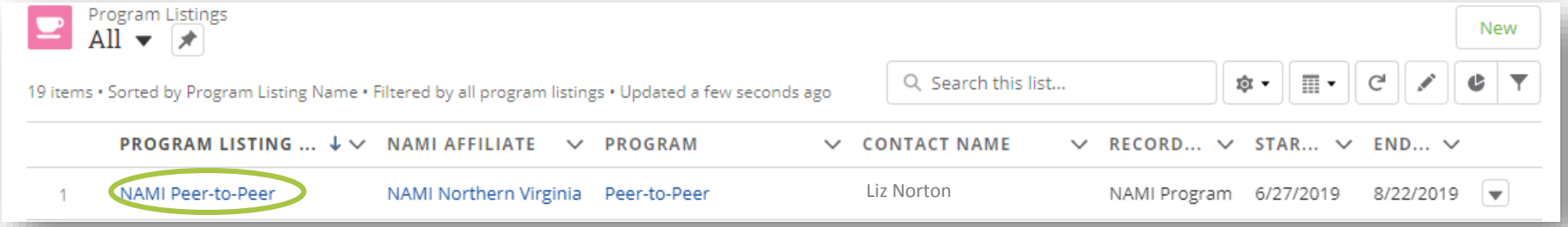

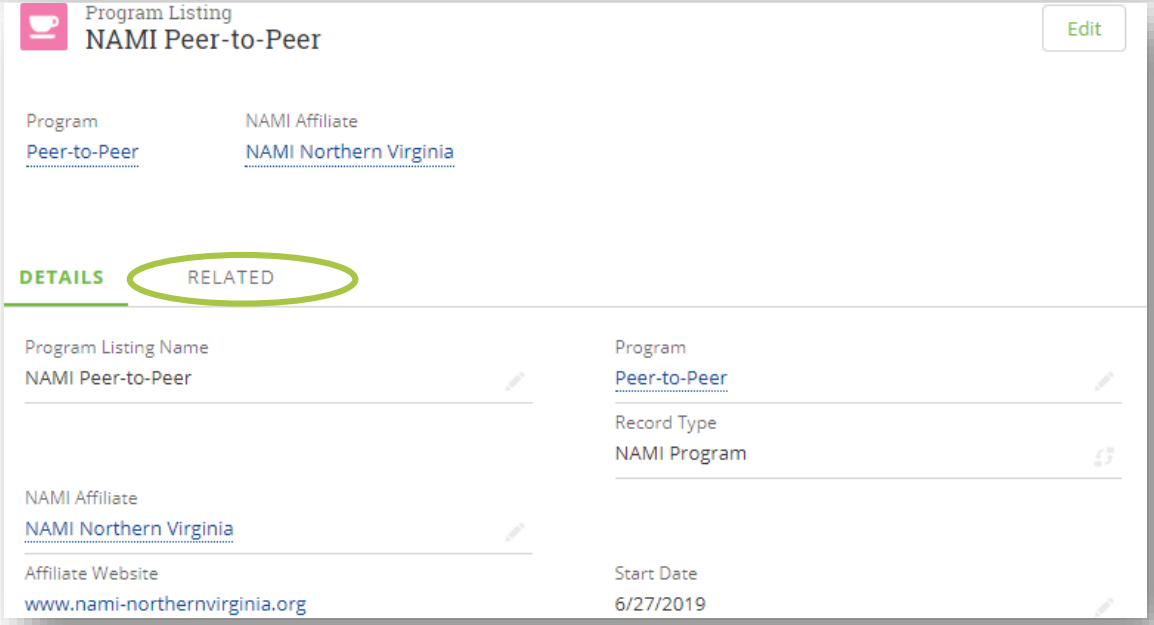

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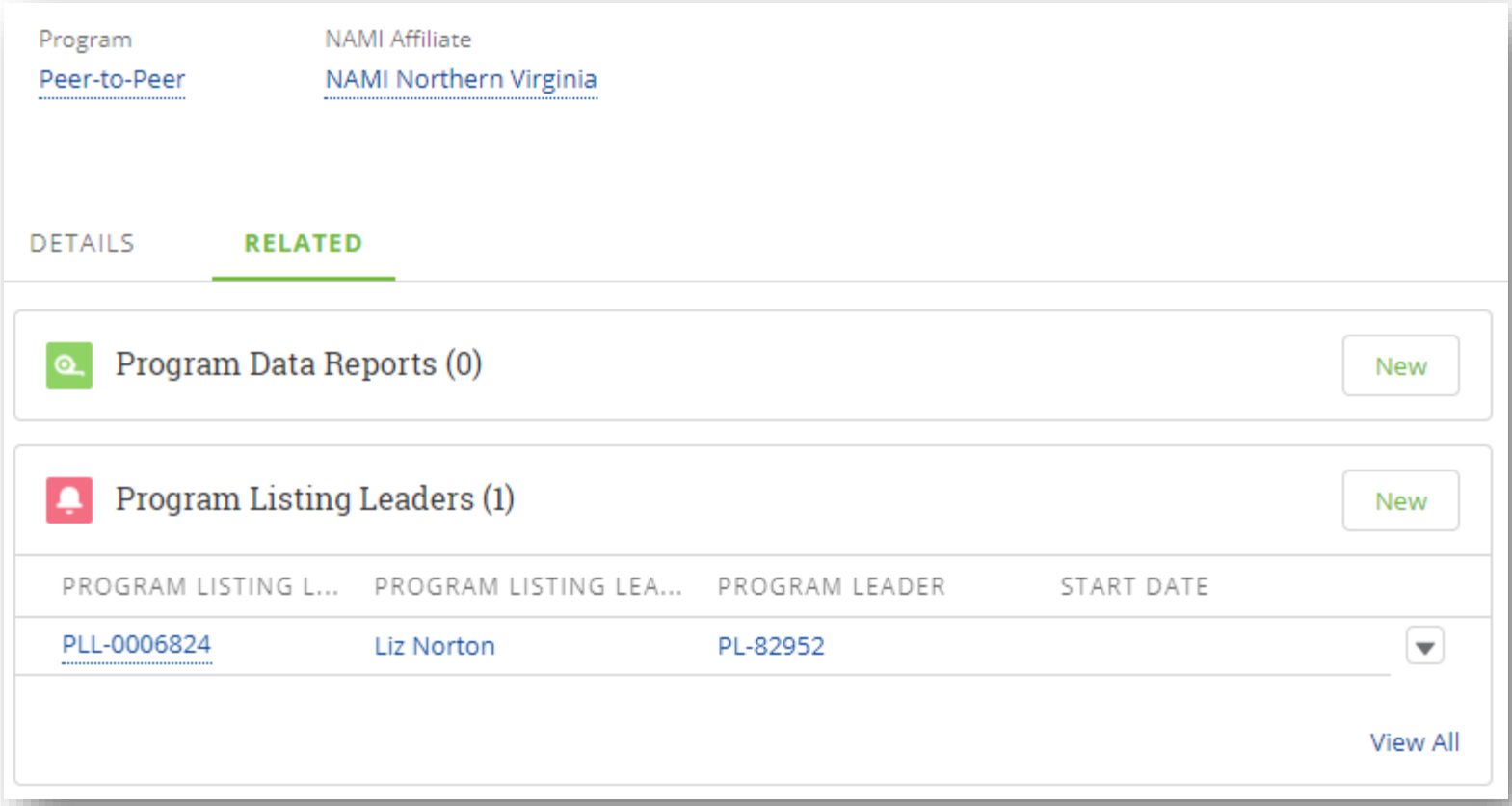

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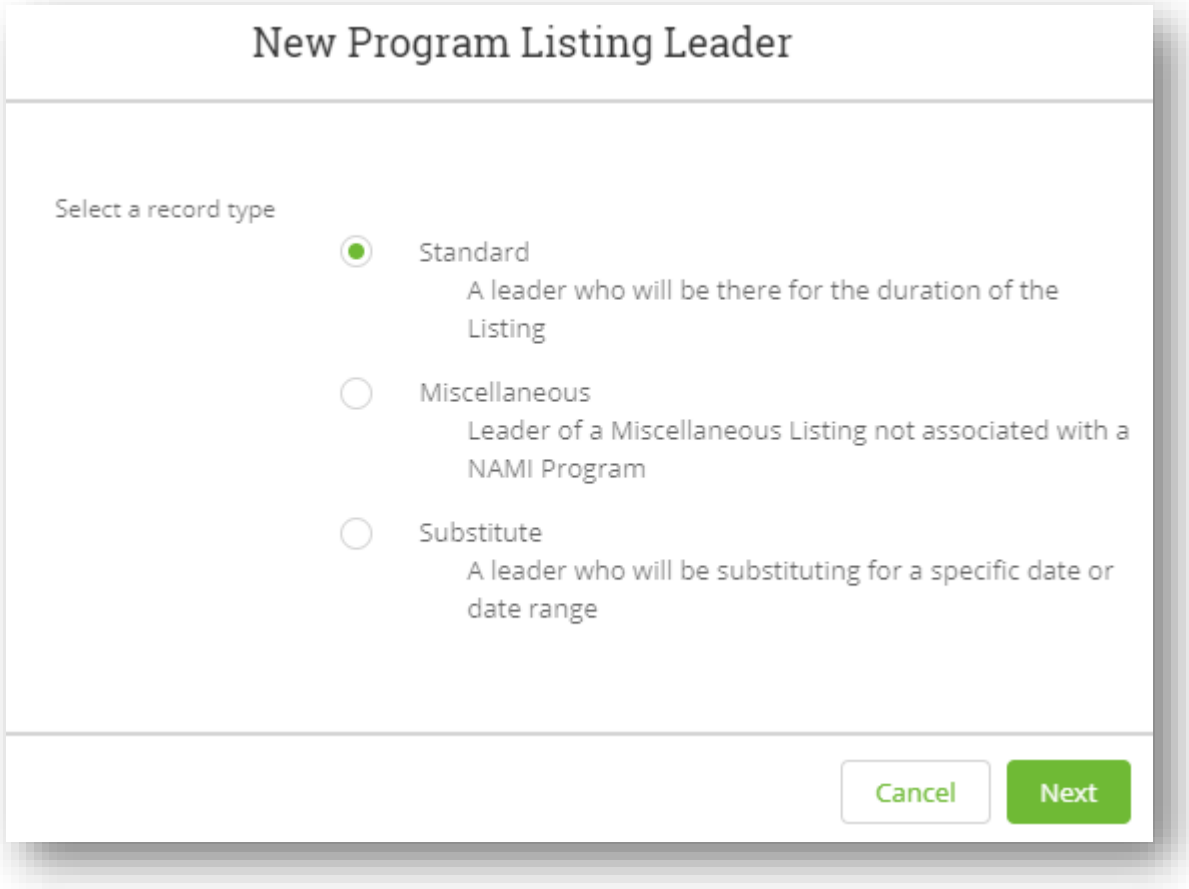

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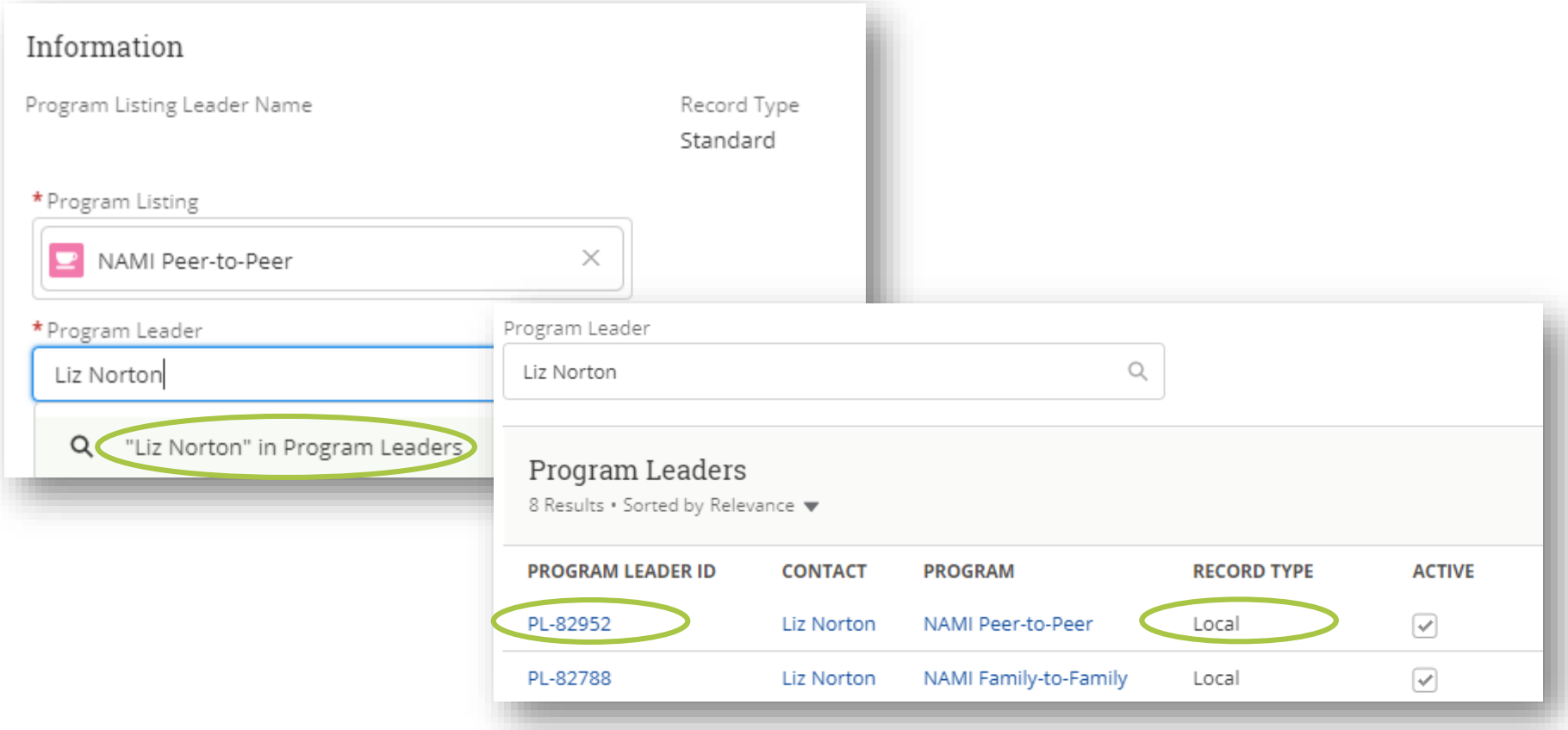
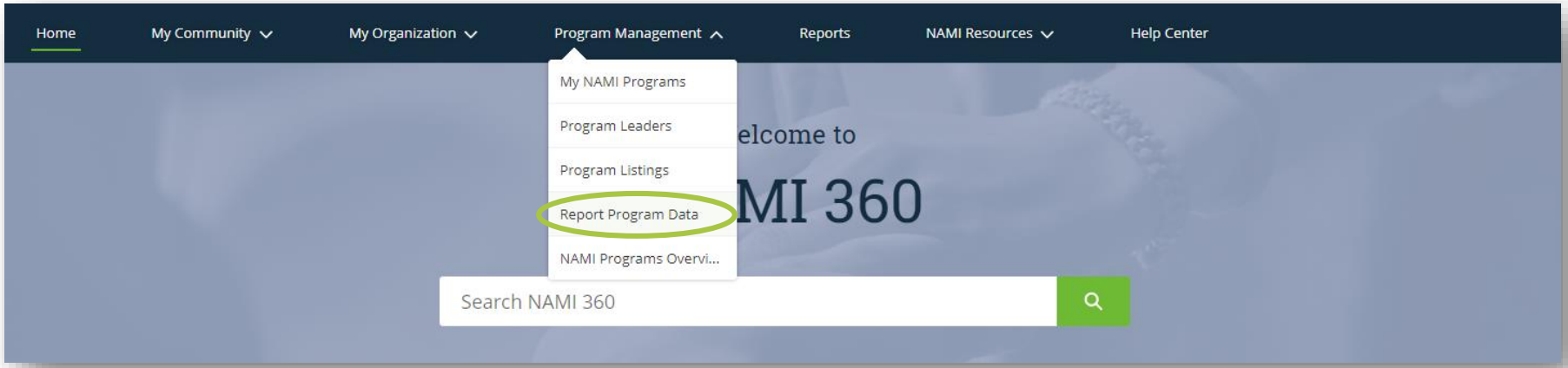


Reporting Program Data



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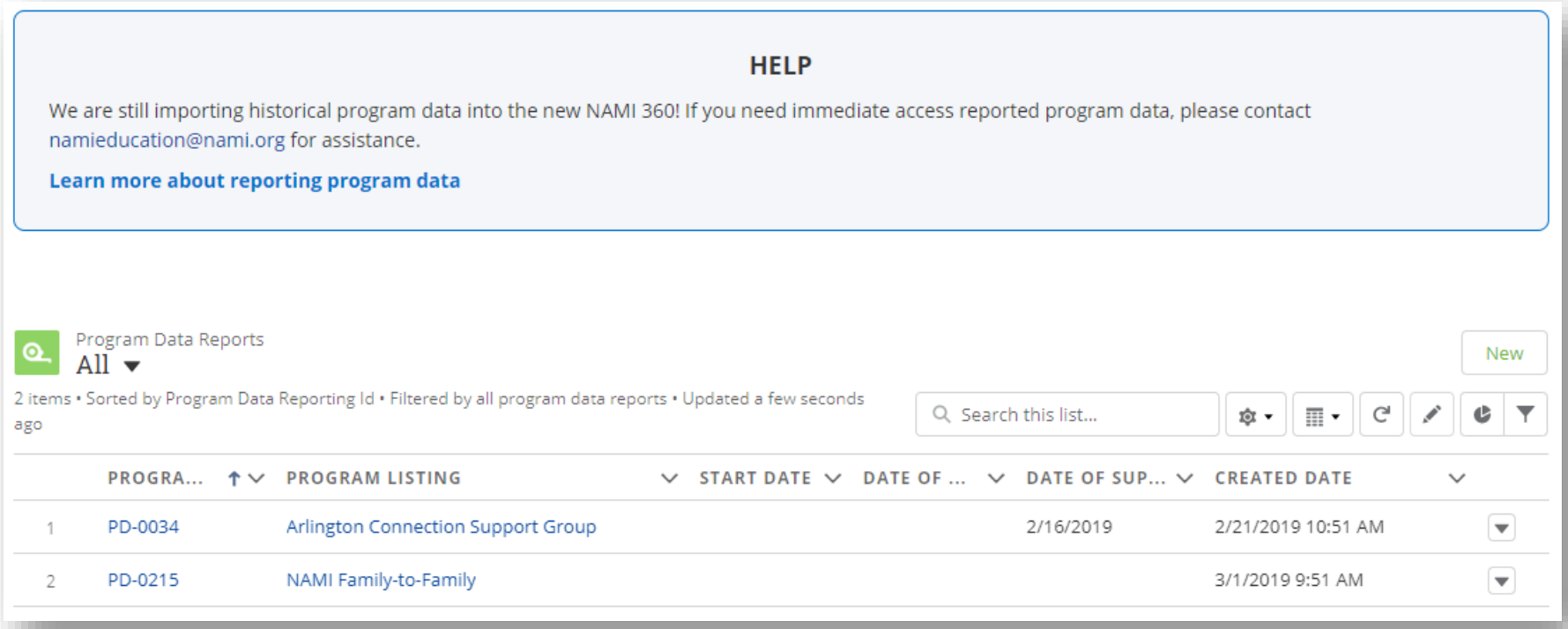

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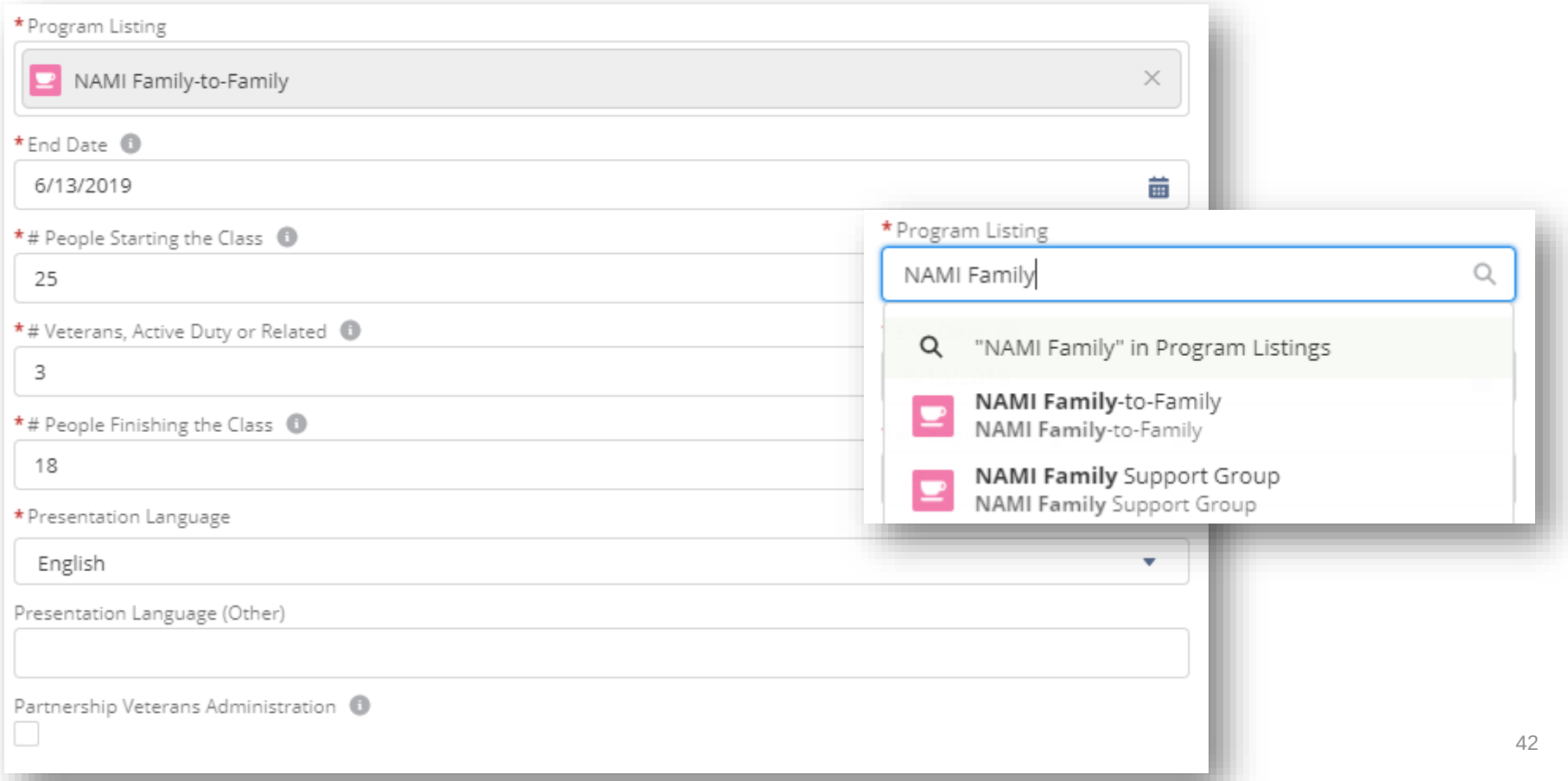
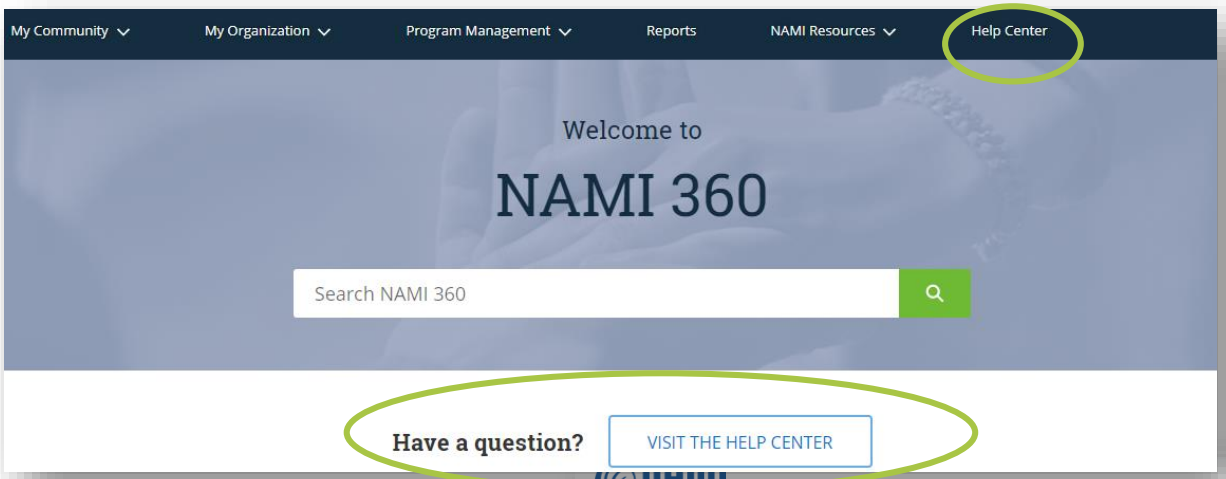
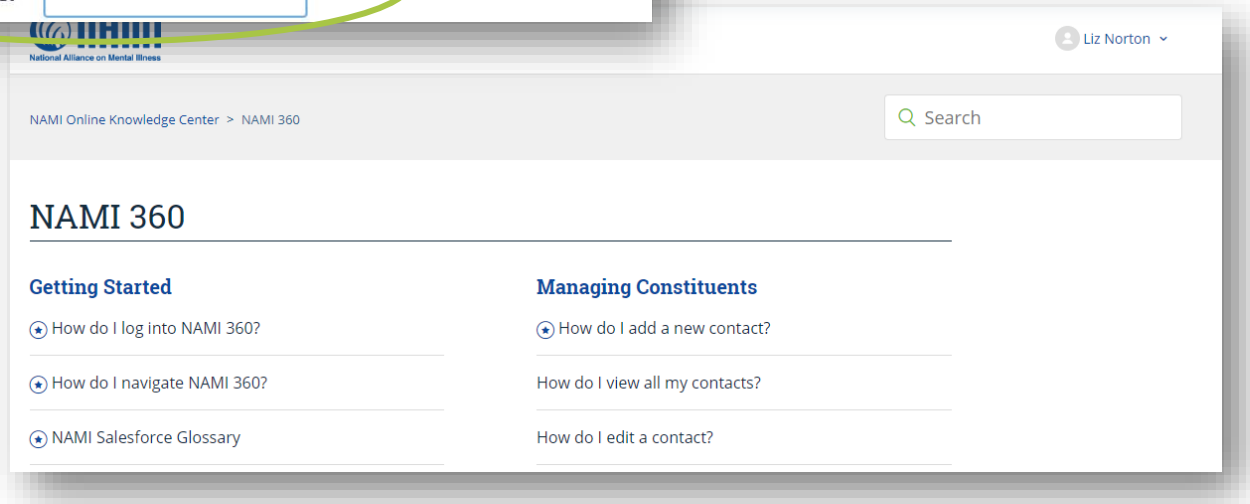
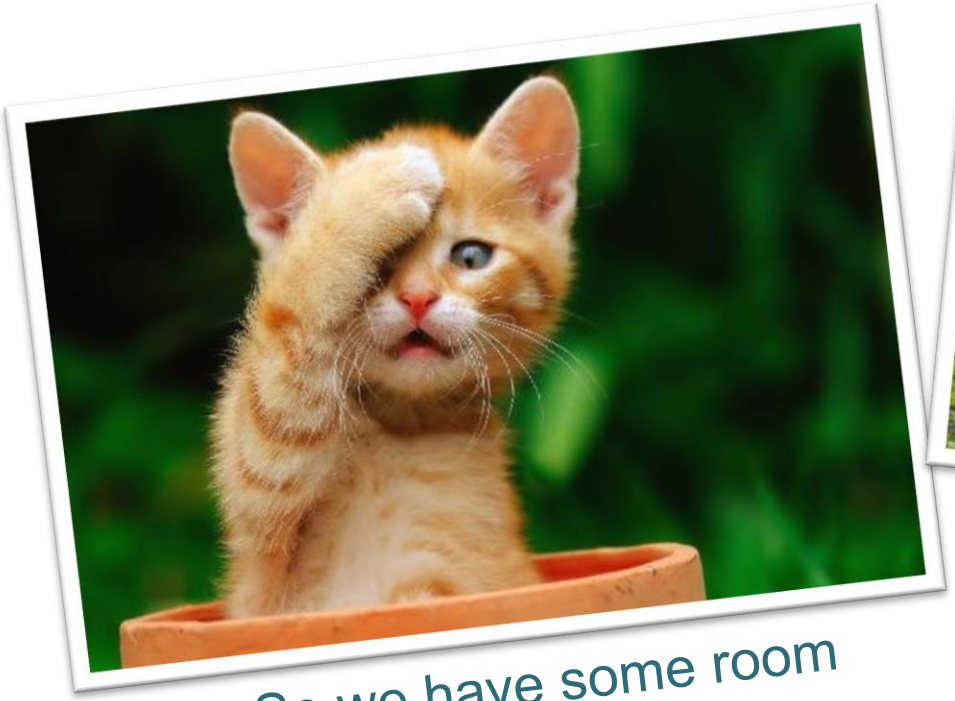


Where to Learn More About NAMI 360

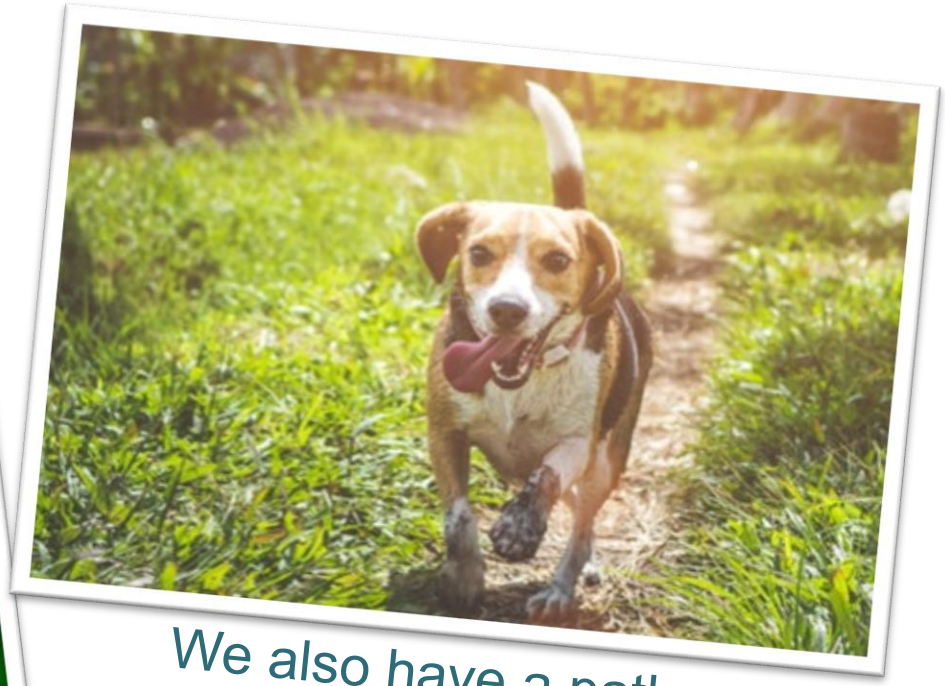




Where Are We Today?



So we have some room for improvement…



We also have a path **forward**.

salesforce@nami.org

Salesforce 101: NAMI 360 Training for States and Affiliates

NAMI 360
Powered by Salesforce
National Alliance on Mental Illness