

Our Movement. Our Moment.

#NAMIcon19



**2019 NAMI
National
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Salesforce 101: NAMI 360 Training for States and Affiliates



nami

National Alliance on Mental Illness

360

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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

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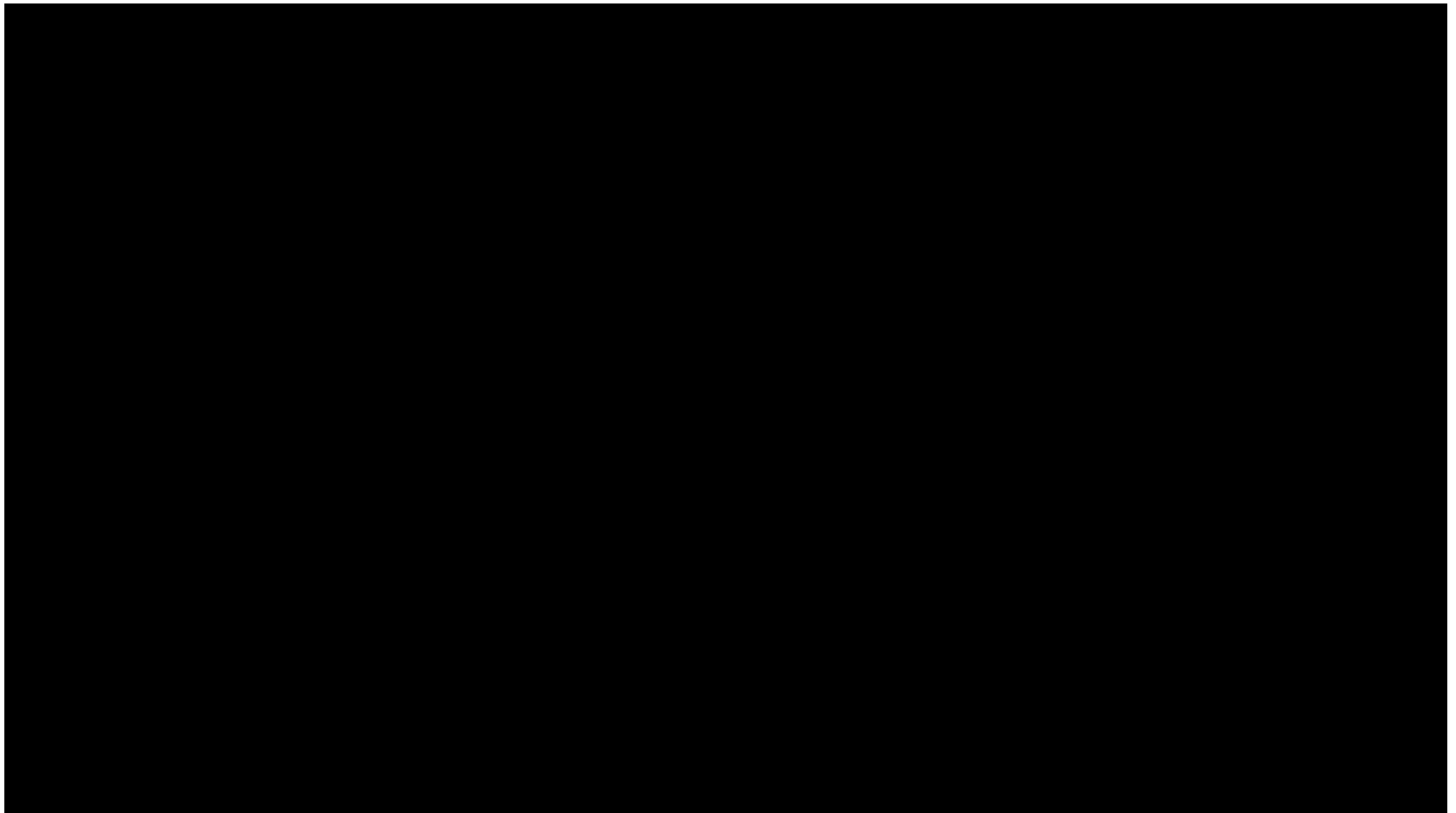
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What is Salesforce?



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How Does NAMI Use Salesforce?

NAMI National

A screenshot of a Salesforce CRM profile page for a contact named Ms. Liz Norton. The page shows various tabs like 'Details', 'Related', and 'Activities'. Under 'Details', there are fields for Account Name, Name, Nickname, Salutation, and Designation. The 'Activities' section shows a recent email from NAMI Florida Consultant.

NAMI 360
Powered by Salesforce

A screenshot of the NAMI 360 user portal. The page features a search bar, a 'Have a question? VISIT THE HELP CENTER' button, and a 'Quick Links' section with four green buttons: Reports, Program Listings, Membership Batches, and Members.

NAMI Board of
Directors Community

A screenshot of the NAMI Board of Directors Community page. It includes a welcome message, a photo of the 2018-2019 Board of Directors, and a 'BOARD CALENDAR' section listing upcoming meetings such as the Board Meeting, Monthly Finance & Audit Committee Meeting, and Monthly Development Committee Call.

NAMI User Portal

A screenshot of the NAMI User Portal. The page has a dark header with navigation links. Below the header, there is a 'Welcome to the NAMI User Portal' message, a 'Have a question about the NAMI User Portal? VISIT THE HELP CENTER' button, and a 'View My Contact Information' button. A 'My Recent Actions' section shows a table of memberships.

ACTIVE MEMBERSHIPS	AFFILIATE	MEMBERSHIP TYPE	MEMBER THROUGH	END DATE
	NAMI Northern Virginia	Regular	Self	11/25/2019

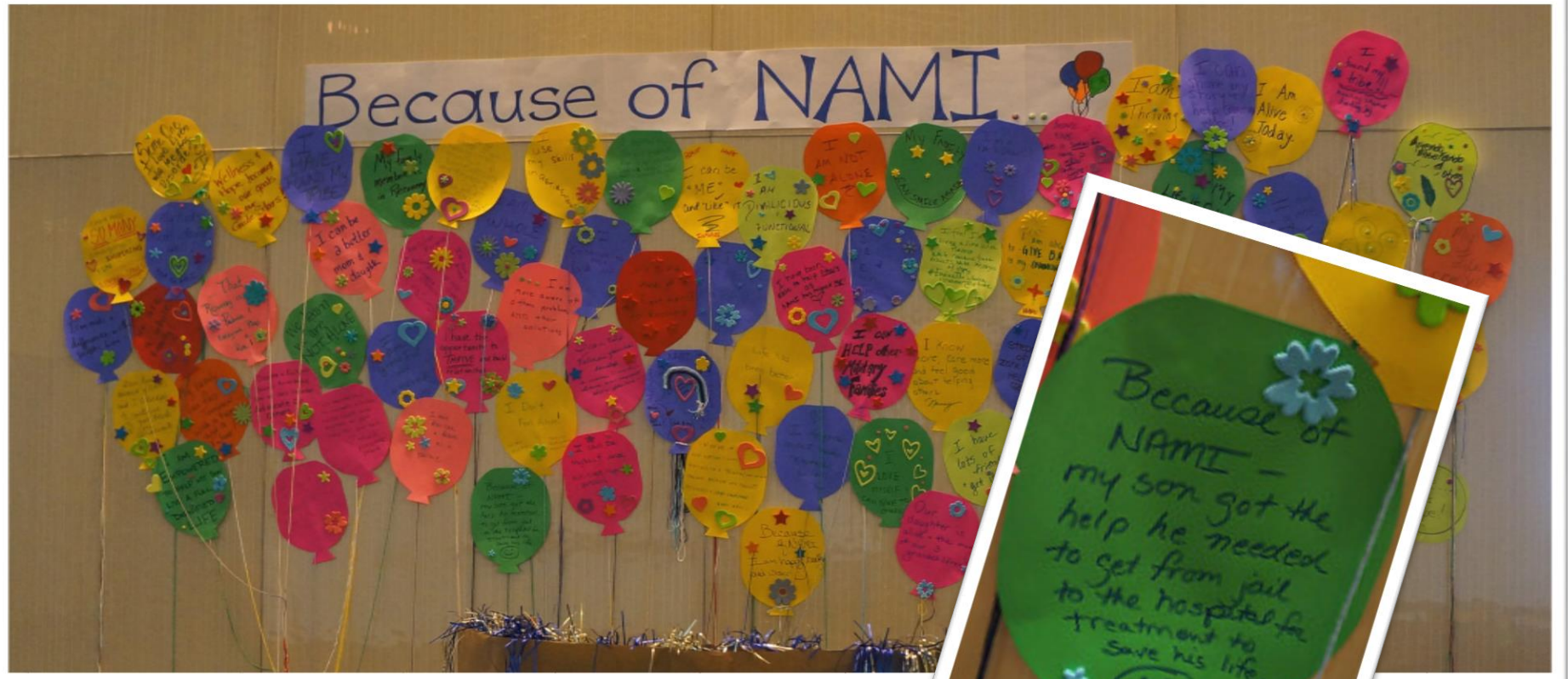
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What Can You Do on NAMI 360?

The screenshot shows the NAMI 360 web application interface. At the top left is the NAMI 360 logo with the tagline "Powered by Solutions". To the right is a search bar and a user profile for "Tanya Wu". Below the header is a navigation menu with links for Home, My Community, My Organization, Program Management, Reports, NAMI Resources, and Help Center. The main content area features a large "Welcome to NAMI 360" message and a search bar. Below this is a "Have a question? VISIT THE HELP CENTER" button. The "Quick Links" section contains four green buttons: "Reports" (with a document icon), "Program Listings" (with a person at a presentation icon), "Membership Batches" (with a group of people icon), and "Members" (with a person and list icon).

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

The screenshot displays the NAMI 360 web application interface. At the top, a dark navigation bar contains the following menu items: Home, My Community (with a dropdown arrow), My Organization (with a dropdown arrow), Program Management (with a dropdown arrow), Reports, NAMI Resources (with a dropdown arrow), and Help Center. A dropdown menu is open under 'My Community', listing 'All Contacts', 'Members', and 'Membership Batches', with 'Membership Batches' circled in green. Below the navigation bar, a large banner area features the text 'Welcome to NAMI 360' and a search bar labeled 'Search NAMI 360' with a magnifying glass icon. A 'Have a question?' prompt is followed by a 'VISIT THE HELP CENTER' button. The 'Quick Links' section contains four green tiles: 'Reports' (with a document icon), 'Program Listings' (with a person at a presentation board icon), 'Membership Batches' (with a group of people icon, circled in blue), and 'Members' (with a person and list icon).



Managing Memberships

Membership Batches

HELP

In order to process memberships in bulk, you can use batch memberships functionality here. Click the "Go To Batch" buttons below to manage existing membership batches. You can edit specific memberships for batches that have not been paid and submitted. Click the "Go To Batch" buttons below to manage existing membership batches. Click "Create Batch" to make a new membership batch.

[More help for membership batches >](#)

Open/Closed eBatches



Create Batch

OPEN BATCHES

BATCH NAME	CREATED BY	CREATED DATE	DESCRIPTION	CLOSED DATE	TOTAL AMOUNT	
Test Batch 2019		06/13/2019	Test batch by NAMI ...		\$0.00	Go To Batch

CLOSED BATCHES

BATCH NAME	CREATED BY	CREATED DATE	DESCRIPTION	CLOSED DATE	TOTAL AMOUNT	
June 2019 Batch #1	Tia Jones	06/02/2019		06/10/2019	\$32.00	Go To Batch

Managing Memberships

Open/Closed eBatches

Batch Name
Test Batch 2019

Affiliate
NAMI Northern Virginia

Description
Test batch by NAMI National

Cancel Create Batch

Affiliate
NAMI
"NAMI" in Accounts
NAMI Northern Virginia



Managing Memberships

Open/Closed eBatches



[Go Back](#)

Test Batch 2019
eBatch Description: Test batch by NAMI National
Total Cost: \$0.00

[Remove from Batch](#) [Add Membership](#) [Delete Batch](#) [Pay Batch](#)

<input type="checkbox"/>	NAME	AFFILIATE	MEMBERS...	WITHHOLD L...	WITHHOLD S...	START DATE	EXPIRATIO...	COST
--------------------------	------	-----------	------------	---------------	---------------	------------	--------------	------

Managing Memberships

Open/Closed eBatches

[Go Back](#)

Test Batch 2019
eBatch Description: Test batch by NAMI National
Total Cost: \$0.00

Create Membership

Primary Contact * ⓘ

Member Level * ⓘ

Leave empty if you want to add an additional year to their existing membership.
Membership Start Date ⓘ

Withhold Local ⓘ

Withhold State ⓘ

[Cancel](#) [Save](#)

* Contact

🔍 "Liz Norton" in Contacts

- Liz Norton
500189619I
- Liz Nortonson
600123456I
- + New Contact

Managing Memberships

Open/Closed eBatches



[Go Back](#)

Test Batch 2019
eBatch Description: Test batch by NAMI National
Total Cost: \$20.00

[Remove from Batch](#) [Add Membership](#) [Delete Batch](#) [Pay Batch](#)

<input type="checkbox"/>	NAME	AFFILIATE	MEMBERS...	WITHHOLD L...	WITHHOLD S...	START DATE	EXPIRATIO...	COST	
<input type="checkbox"/>	Norton, Liz	NAMI Norther...	Regular	✓		07/07/2021	07/06/2022	\$20.00	Edit

Managing Memberships

Open/Closed eBatches

Go Back Review Transaction

Payment

Amount: \$20.00

BILLING INFORMATION

* Street: 111 Test St

* City: Testville * State/Province: VA

* Zip/Postal Code: 12345 * Country: United States

CREDIT CARD INFORMATION

* Credit Card Number: 4111111111111111

* First Name: Liz * Last Name: Norton

* Expiration Date: 02/23 * CCV: 123



Managing Memberships

Open/Closed eBatches



[Go Back](#)

[Complete Transaction](#)

Transaction Summary

Your total transaction cost is: \$20.00

Your transaction is not complete until you click the "Complete Transaction" button.

Clicking "Complete Transaction" more than once may result in your card being charged again for this transaction.

You are about to create the following memberships:

NAME	AFFILIATE	MEMBERSHIP	WITHHOLD LOC...	WITHHOLD STA...	START DATE	EXPIRATION ...	COST
Norton, Liz	NAMI Northern ...	Regular	✓		07/07/2021	07/06/2022	\$20.00

Managing Board and Staff

The screenshot displays the NAMI 360 web application interface. The top navigation bar includes links for Home, My Community, My Organization, Program Management, Reports, NAMI Resources, and Help Center. The 'My Organization' dropdown menu is open, showing options for States & Affiliates, Organization Documents, Board & Staff (highlighted with a green oval), and Manage Staff Access. The main content area features a 'Welcome to NAMI 360' message, a search bar with the placeholder text 'Search NAMI 360', and a 'Have a question? VISIT THE HELP CENTER' button. Below this is a 'Quick Links' section.

Managing Board and Staff

My Board and Staff

HELP

Below is a list of all Board and Staff members for your organization! Click on the person's name and see more information about them.

[More help for managing board and staff members >](#)



Affiliations

Board and Staff ▾

New

7 items • Sorted by Contact • Filtered by all affiliations - 5 more filters applied • Updated a few seconds ago

Search this list...



CONTACT ↑



ROLE PICKLIST



END DATE



ORGANIZATION



1



Sally Smith

Programs Contact

NAMI Northern Virginia



2



Vadim Prokhorov

Executive Director

NAMI Northern Virginia





Managing Board and Staff

New Affiliation

Select a record type

State/Affiliate

Standard Affiliation
All affiliations that are not membership or State/Affiliate affiliations.

Managing Board and Staff

Affiliation Information

* Organization
NAMI Northern Virginia

Role Picklist
Education Program Administrator

Start Date
6/13/2019

Primary

Description

* Contact
Liz Norton

Status
Active

Record Type
State/Affiliate

End Date

Show on Web?

Organization Search
Search Accounts...
NAMI Northern Virginia
+ New Account

Contact Search
Liz Norton
"Liz Norton" in Contacts
Liz Norton
5001896191
Liz Nortonson
6001234561
+ New Contact

Managing NAMI 360 Access

The screenshot displays the NAMI 360 web application interface. At the top, a dark navigation bar contains the following menu items: Home, My Community, My Organization, Program Management, Reports, NAMI Resources, and Help Center. The 'My Organization' dropdown menu is open, showing four options: States & Affiliates, Organization Documents, Board & Staff, and Manage Staff Access. The 'Manage Staff Access' option is circled in green. The main content area features a large blue banner with the text 'Welcome to NAMI 360' and a search bar labeled 'Search NAMI 360'. Below the banner, there is a white section with the text 'Have a question?' and a button labeled 'VISIT THE HELP CENTER'.

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

Information

NAMI 360 Access Name

* Contact

Liz Norton

* Chapter

NAMI Northern Virginia

Access Level

* Access Level

Basic

[View all dependencies](#)

Modular Access

Available	Chosen
Education Read-Only	Education
Membership Read-Only	Membership
Affiliations	
Affiliations Read-Only	

[View all dependencies](#)

* Contact

Liz Norton

"Liz Norton" in Contacts

Liz Norton
5001896191

Liz Nortonson
6001234561

+ New Contact

* Chapter

Search Accounts...

NAMI Northern Virginia

+ New Account

* Access Level

Basic

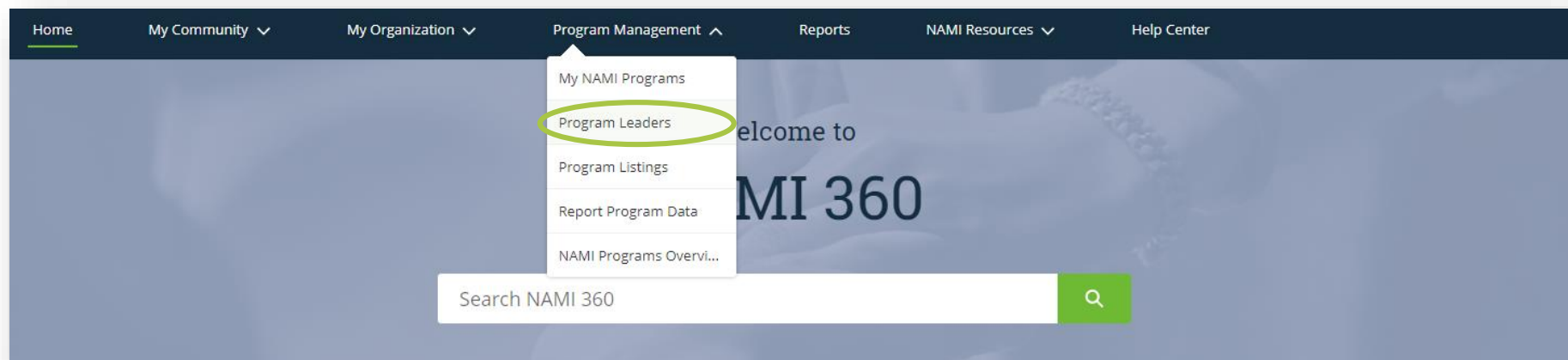
--None--

Basic

Admin

No Access

Managing Program Leaders



Managing Program Leaders

My Program Leaders

HELP

Click on a name below and go to the "Related" tab on their contact record to manage which programs they lead. You can also click the "New" button on the top right of the table.

[More help for managing program leaders >](#)

Program Leaders ▼ ↑

8 items • Sorted by Program Leader ID • Filtered by all program leaders • Role, Record Type • Updated a few seconds ago

Search:

	PROGRAM ...	CONTACT	PROGRAM	ROLE	RECORD TYPE	ACTIVE	
1	PL-51055	Liz Norton	NAMI In Our Own Voice	Program Leader	Leader Designation	✓	▼
2	PL-51056	Liz Norton	NAMI Family-to-Family	Program Leader	Leader Designation	✓	▼
3	PL-51057	Liz Norton	NAMI Peer-to-Peer	Program Leader	Leader Designation	✓	▼
4	PL-59554	Liz Norton	NAMI Ending the Silence	Program Leader	Leader Designation	✓	▼
5	PL-81747	Liz Norton	NAMI Ending the Silence	Program Leader	Local	✓	▼
6	PL-82787	Liz Norton	NAMI In Our Own Voice	Program Leader	Local	✓	▼
7	PL-82788	Liz Norton	NAMI Family-to-Family	Program Leader	Local	✓	▼
8	PL-82952	Liz Norton	NAMI Peer-to-Peer	Program Leader	Local	✓	▼

LIST VIEWS

- All
- ✓ Program Leaders (Pinned list)
- Recently Viewed
- Trainers



Managing Program Leaders

New Program Leader

Select a record type

Local
Contact leads a Program for a Local Affiliate. Should be connected to a Local Program.

Leader Designation
Stores qualifications and status for a Contact. Should be connected to a National Program

Managing Program Leaders

Information

Program Leader ID

Record Type

Leader Designation


* Contact

 Liz Norton ×

Role

ETS Lead Staff ▼

* Program

 NAMI Ending the Silence ×

Master Active

Training Information

Date of Initial Training ⓘ


6/1/2019 




Date of Re-Training



Program

NAMI Ending the Silence 🔍

 "NAMI Ending the Silence" in Programs

-  NAMI Ending the Silence
-  NAMI Ending the Silence
NAMI Northern Virginia
-  NAMI Ending the Silence
NAMI Virginia
- + New Program

Program

3 Results • Sorted by Relevance ▼

PROGRAM AUTHORIZATION	STATE / AFFILIATE	RECORD TYPE	PARENT PROGRAM
NAMI Ending the Silence		National	
NAMI Ending the Silence	NAMI Northern Virginia	Local	NAMI Ending the S
NAMI Ending the Silence	NAMI Virginia	State	NAMI Ending the S



Managing Program Leaders

New Program Leader

Select a record type

Local
Contact leads a Program for a Local Affiliate. Should be connected to a Local Program.

Leader Designation
Stores qualifications and status for a Contact. Should be connected to a National Program



Managing Program Leaders

New Program Leader: Local

Information

Program Leader ID

* Contact
Search Contacts...

* Program
Search Programs...

* Affiliate
Search Accounts...

Master Program Leader ⓘ
Search Program Leaders...

Record Type
Local

* Role
--None--

Cancel Save & New Save

Managing Program Leaders

Master Program Leader ⓘ

PL 🔍

🔍 "PL" in Program Leaders

+ New Program Leader

PROGRAM LEADER ID	CONTACT	PROGRAM	RECORD TYPE	ACTIVE
PL-59554	Liz Norton	NAMI Ending the Silence	Leader Designation	<input checked="" type="checkbox"/>
PL-51057	Liz Norton	NAMI Peer-to-Peer	Leader Designation	<input checked="" type="checkbox"/>
PL-51056	Liz Norton	NAMI Family-to-Family	Leader Designation	<input checked="" type="checkbox"/>
PL-51055	Liz Norton	NAMI In Our Own Voice	Leader Designation	<input checked="" type="checkbox"/>

Managing Program Leaders

Information

Program Leader ID

Master Program Leader ⓘ

PL-59554

Record Type

Local

* Contact

Liz Norton

* Program

NAMI Ending the Silence

* Role

ETS Lead Staff

* Affiliate

NAMI Northern Virginia

Program

NAMI Ending the Silence

"NAMI Ending the Silence" in Programs

NAMI Ending the Silence
NAMI Northern Virginia

NAMI Ending the Silence
NAMI Virginia

+ New Program

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	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
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

The screenshot displays the NAMI 360 web application interface. At the top left is the NAMI 360 logo. A navigation bar includes links for Home, My Community, My Organization, Program Management, Reports, NAMI Resources, and Help Center. A dropdown menu under Program Management is open, with 'Program Listings' highlighted by a green oval. Below the navigation is a search bar with the text 'Search NAMI 360'. A 'Have a question? VISIT THE HELP CENTER' button is present. A 'Quick Links' section at the bottom features four green tiles: Reports, Program Listings (circled in blue), Membership Batches, and Members.




Listing/Capturing Program Information

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

New Program Listing: NAMI Program

Information

* Program Listing Name

* Program

Record Type
NAMI Program

* NAMI Affiliate

NAMI State Organization

Facility Name

Room Name


* Start Date

End Date

Start Time ⓘ

End Time ⓘ

* Program

-  NAMI Ending the Silence
NAMI Northern Virginia
- + New Program

Listing/Capturing Program Information

Program Listings
All

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

Search this list...

New

	PROGRAM LISTING ...	NAMI AFFILIATE	PROGRAM	CONTACT NAME	RECORD...	STAR...	END...
1	NAMI Peer-to-Peer	NAMI Northern Virginia	Peer-to-Peer	Liz Norton	NAMI Program	6/27/2019	8/22/2019

Program Listing
NAMI Peer-to-Peer Edit

Program: [Peer-to-Peer](#)
NAMI Affiliate: [NAMI Northern Virginia](#)

DETAILS **RELATED**

Program Listing Name NAMI Peer-to-Peer	Program Peer-to-Peer
NAMI Affiliate NAMI Northern Virginia	Record Type NAMI Program
Affiliate Website www.nami-northernvirginia.org	Start Date 6/27/2019



Listing/Capturing Program Information

Program [Peer-to-Peer](#) NAMI Affiliate [NAMI Northern Virginia](#)

DETAILS **RELATED**

Program Data Reports (0) [New](#)

Program Listing Leaders (1) [New](#)

PROGRAM LISTING L...	PROGRAM LISTING LEA...	PROGRAM LEADER	START DATE
PLL-0006824	Liz Norton	PL-82952	

[View All](#)



Listing/Capturing Program Information

New Program Listing Leader

Select a record type

- Standard
A leader who will be there for the duration of the Listing
- Miscellaneous
Leader of a Miscellaneous Listing not associated with a NAMI Program
- Substitute
A leader who will be substituting for a specific date or date range



Listing/Capturing Program Information

Information

Program Listing Leader Name Record Type
Standard

* Program Listing

NAMI Peer-to-Peer

* Program Leader

Liz Norton

Program Leader

Liz Norton

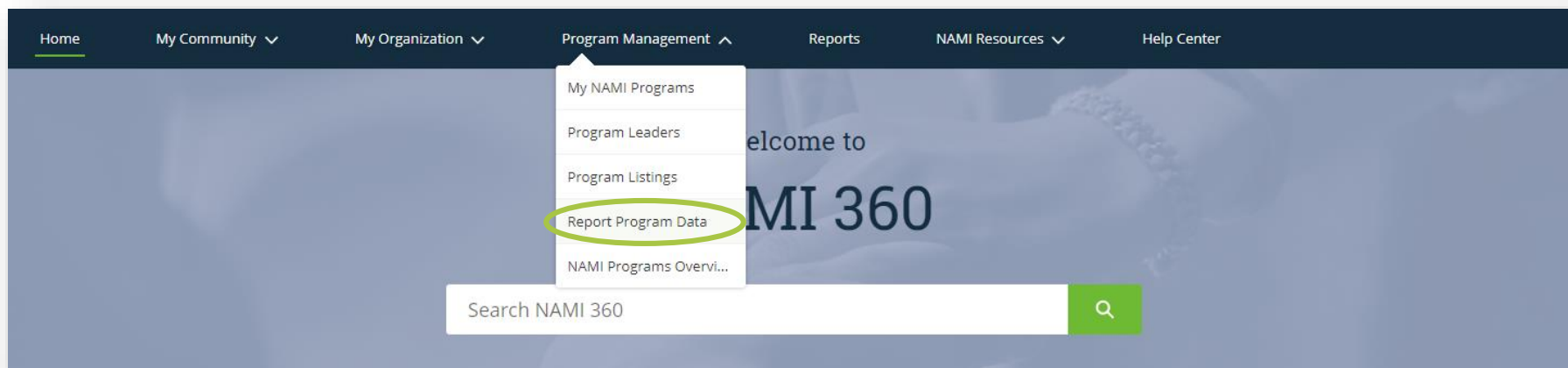
Q "Liz Norton" in Program Leaders

Program Leaders

8 Results • Sorted by Relevance ▼

PROGRAM LEADER ID	CONTACT	PROGRAM	RECORD TYPE	ACTIVE
PL-82952	Liz Norton	NAMI Peer-to-Peer	Local	<input checked="" type="checkbox"/>
PL-82788	Liz Norton	NAMI Family-to-Family	Local	<input checked="" type="checkbox"/>

Reporting Program Data





Reporting Program Data

HELP

We are still importing historical program data into the new NAMI 360! If you need immediate access reported program data, please contact nameducation@nami.org for assistance.

[Learn more about reporting program data](#)



Program Data Reports

All ▾

New

2 items • Sorted by Program Data Reporting Id • Filtered by all program data reports • Updated a few seconds ago

Search this list...



	PROGRA... ↑ ▾	PROGRAM LISTING ▾	START DATE ▾	DATE OF ... ▾	DATE OF SUP... ▾	CREATED DATE ▾	
1	PD-0034	Arlington Connection Support Group			2/16/2019	2/21/2019 10:51 AM	▾
2	PD-0215	NAMI Family-to-Family				3/1/2019 9:51 AM	▾



Reporting Program Data

New Program Data Reporting


Select a record type

- NAMI Basics
- Miscellaneous
Miscellaneous meetings, programs, or presentations
- NAMI Connection Recovery Support Group
- NAMI Ending the Silence
- NAMI FaithNET
- NAMI Family Support Group
- NAMI Family-to-Family
- NAMI Homefront
- NAMI In Our Own Voice
- NAMI Peer-to-Peer
- NAMI Provider Education
- NAMI Smarts for Advocacy
- Sharing Hope




Reporting Program Data

* Program Listing

 NAMI Family-to-Family ✕

* End Date ⓘ

6/13/2019 

* # People Starting the Class ⓘ

25


* # Veterans, Active Duty or Related ⓘ

3

* # People Finishing the Class ⓘ

18


* Presentation Language


English 


Presentation Language (Other)


Partnership Veterans Administration ⓘ

* Program Listing

NAMI Family 

 "NAMI Family" in Program Listings

 **NAMI Family-to-Family**
NAMI Family-to-Family

 **NAMI Family Support Group**
NAMI Family Support Group

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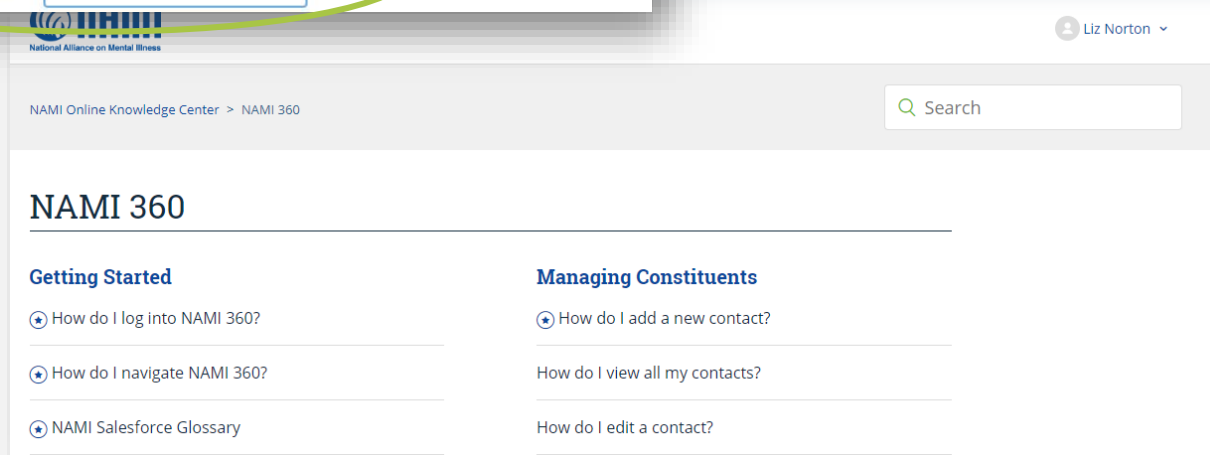
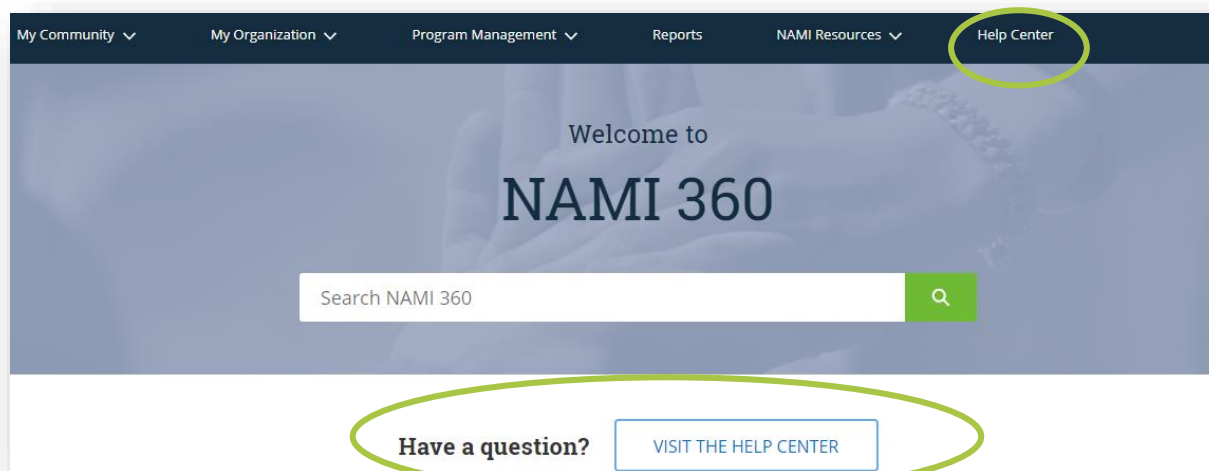
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Where to Learn More About NAMI 360



Our Movement. Our **Moment.**

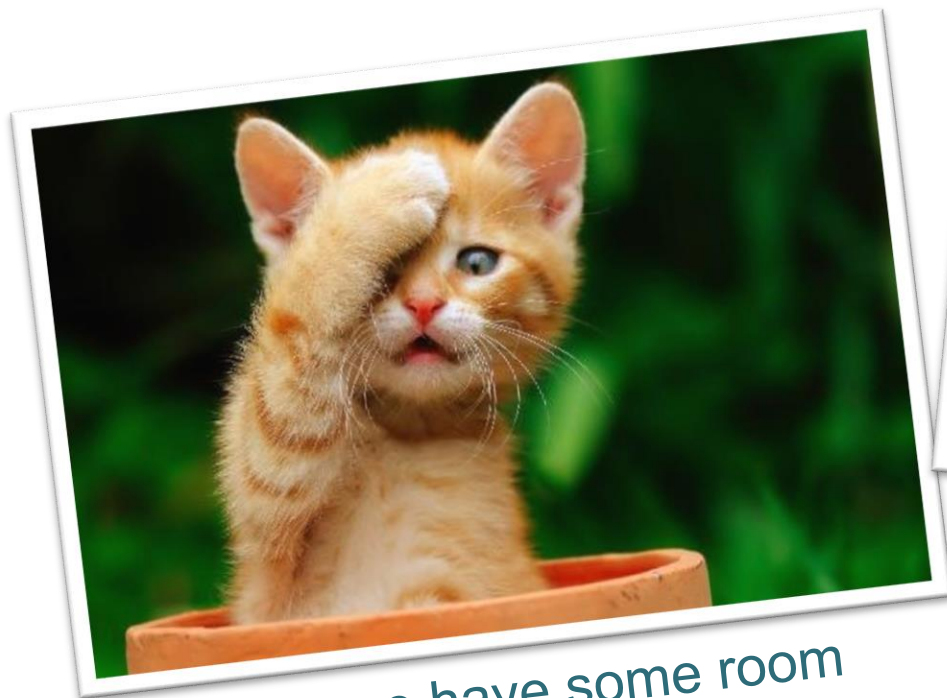
#NAMIcon19



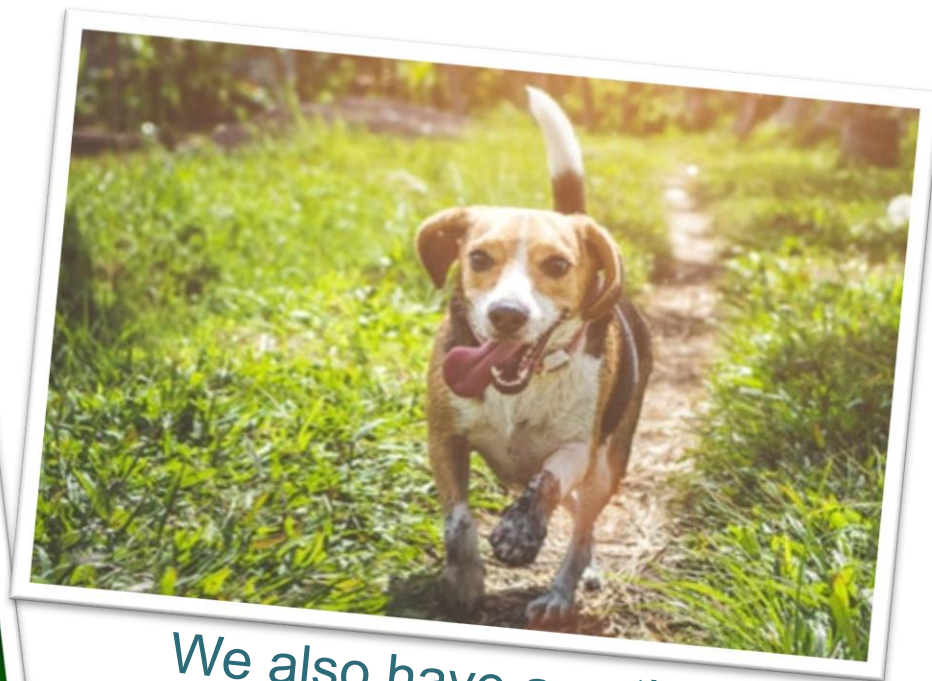
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Where Are We Today?



So we have some room
for improvement...



We also have a path
forward.

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Salesforce 101: NAMI 360 Training for States and Affiliates



nami

National Alliance on Mental Illness

360

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