Salesforce 101: NAMI 360 Training for States and Affiliates
Our Movement. Our Moment.

#NAMICon19

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Chief Information Officer, NAMI

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Salesforce Administrator, NAMI

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Chief Information Officer, NAMI
What is Salesforce?
How Does NAMI Use Salesforce?

NAMI National

NAMI 360

Powered by Salesforce

NAMI Board of Directors Community

NAMI User Portal
Because of NAMI...
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

### 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 Batches

<table>
<thead>
<tr>
<th>Open/Closed Batches</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

**Open Batches**

<table>
<thead>
<tr>
<th>BATCH NAME</th>
<th>CREATED BY</th>
<th>CREATED DATE</th>
<th>DESCRIPTION</th>
<th>CLOSED DATE</th>
<th>TOTAL AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Batch 2019</td>
<td></td>
<td>06/13/2019</td>
<td>Test batch by NAMI ...</td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Closed Batches**

<table>
<thead>
<tr>
<th>BATCH NAME</th>
<th>CREATED BY</th>
<th>CREATED DATE</th>
<th>CLOSED DATE</th>
<th>TOTAL AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 2019 Batch #1</td>
<td>Tia Jones</td>
<td>06/02/2019</td>
<td>06/10/2019</td>
<td>$32.00</td>
</tr>
</tbody>
</table>
Managing Memberships
Managing Memberships

Open/Closed eBatches

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

Controls:
- Go Back
- Remove from Batch
- Add Membership
- Delete Batch
- Pay Batch

Table:

<table>
<thead>
<tr>
<th>NAME</th>
<th>AFFILIATE</th>
<th>MEMBERS...</th>
<th>WITHHOLD L...</th>
<th>WITHHOLD S...</th>
<th>START DATE</th>
<th>EXPIRATION</th>
<th>COST</th>
</tr>
</thead>
</table>


Managing Memberships

Open/Closed eBatches

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

Create Membership

Primary Contact:
Liz Norton

Member Level:
Regular

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

Withhold Local

Withhold State
Managing Memberships

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

<table>
<thead>
<tr>
<th>NAME</th>
<th>AFFILIATE</th>
<th>MEMBERS...</th>
<th>WITHHOLD L...</th>
<th>WITHHOLD S...</th>
<th>START DATE</th>
<th>EXPIRATION</th>
<th>COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norton, Liz</td>
<td>NAMI Norther...</td>
<td>Regular</td>
<td></td>
<td></td>
<td>07/07/2021</td>
<td>07/06/2022</td>
<td>$20.00</td>
</tr>
</tbody>
</table>
Managing Memberships

Open/Closed eBatches

Payment

BILLING INFORMATION
- Street
  111 Test St
- City
  Testville
- Zip/Postal Code
  12345
- State/Province
  VA
- Country
  United States

CREDIT CARD INFORMATION
- Credit Card Number
  4111111111111111
- First Name
  Liz
- Last Name
  Norton
- Expiration Date
  02/23
- CVV
  123

Amount
$20.00
Managing Memberships

Open/Closed eBatches

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:

<table>
<thead>
<tr>
<th>NAME</th>
<th>AFFILIATE</th>
<th>MEMBERSHIP</th>
<th>WITHHOLD LOCAL</th>
<th>WITHHOLD STATE</th>
<th>START DATE</th>
<th>EXPIRATION</th>
<th>COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norton, Liz</td>
<td>NAMI Northern ...</td>
<td>Regular</td>
<td></td>
<td></td>
<td>07/07/2021</td>
<td>07/06/2022</td>
<td>$20.00</td>
</tr>
</tbody>
</table>
Managing Board and Staff
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

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

<table>
<thead>
<tr>
<th>CONTACT</th>
<th>ROLE PICKLIST</th>
<th>END DATE</th>
<th>ORGANIZATION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sally Smith</td>
<td>Programs Contact</td>
<td>NAMI Northern Virginia</td>
</tr>
<tr>
<td>2</td>
<td>Vadim Prokhorov</td>
<td>Executive Director</td>
<td>NAMI Northern Virginia</td>
</tr>
</tbody>
</table>
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**: 1
- **Description**: 

**Contact**

- **Name**: Liz Norton
- **Status**: Active
- **Record Type**: 
- **State/Affiliate**: 
- **End Date**: 
- **Show on Web?**: 

**Search Accounts**

- **NAMI Northern Virginia**
  - New Account
- **Liz Norton**
  - 5001896191
  - 6001234561
  - New Contact
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

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

<table>
<thead>
<tr>
<th>CONTACT</th>
<th>NAMI 360 ACCESS NAME</th>
<th>CHAPTER</th>
<th>ACCESS LEVEL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sally Smith</td>
<td>NAMI360-0156</td>
<td>NAMI Northern Virginia</td>
<td>Admin</td>
</tr>
<tr>
<td>Vadim Prokhorov</td>
<td>NAMI360-1064</td>
<td>NAMI Northern Virginia</td>
<td>Admin</td>
</tr>
</tbody>
</table>
Managing NAMI 360 Access

Information
NAMI 360 Access Name
- Contact
  - Liz Norton
- Chapter
  - NAMI Northern Virginia

Access Level
- Access Level
  - Basic

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

Access Level
- 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 on the "New" button on the top right of the table.

More help for managing program leaders >

Program Leaders

List Views
- All
- Program Leaders (Pinned list)
- Trainers

Search: liz norton

<table>
<thead>
<tr>
<th>PROGRAM</th>
<th>CONTACT</th>
<th>PROGRAM</th>
<th>ROLE</th>
<th>RECORD TYPE</th>
<th>ACTIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>PL-51055</td>
<td>Liz Norton</td>
<td>NAMI In Our Own Voice</td>
<td>Program Leader</td>
<td>Leader Designation</td>
<td>✓</td>
</tr>
<tr>
<td>PL-51056</td>
<td>Liz Norton</td>
<td>NAMI Family-to-Family</td>
<td>Program Leader</td>
<td>Leader Designation</td>
<td>✓</td>
</tr>
<tr>
<td>PL-51057</td>
<td>Liz Norton</td>
<td>NAMI Peer-to-Peer</td>
<td>Program Leader</td>
<td>Leader Designation</td>
<td>✓</td>
</tr>
<tr>
<td>PL-59554</td>
<td>Liz Norton</td>
<td>NAMI Ending the Silence</td>
<td>Program Leader</td>
<td>Leader Designation</td>
<td>✓</td>
</tr>
<tr>
<td>PL-81747</td>
<td>Liz Norton</td>
<td>NAMI Ending the Silence</td>
<td>Program Leader</td>
<td>Local</td>
<td>✓</td>
</tr>
<tr>
<td>PL-82787</td>
<td>Liz Norton</td>
<td>NAMI In Our Own Voice</td>
<td>Program Leader</td>
<td>Local</td>
<td>✓</td>
</tr>
<tr>
<td>PL-82788</td>
<td>Liz Norton</td>
<td>NAMI Family-to-Family</td>
<td>Program Leader</td>
<td>Local</td>
<td>✓</td>
</tr>
<tr>
<td>PL-82952</td>
<td>Liz Norton</td>
<td>NAMI Peer-to-Peer</td>
<td>Program Leader</td>
<td>Local</td>
<td>✓</td>
</tr>
</tbody>
</table>
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
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 Table**

<table>
<thead>
<tr>
<th>PROGRAM LEADER ID</th>
<th>CONTACT</th>
<th>PROGRAM</th>
<th>RECORD TYPE</th>
<th>ACTIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>PL-59554</td>
<td>Liz Norton</td>
<td>NAMI Ending the Silence</td>
<td>Leader Designation</td>
<td>✔️</td>
</tr>
<tr>
<td>PL-51057</td>
<td>Liz Norton</td>
<td>NAMI Peer-to-Peer</td>
<td>Leader Designation</td>
<td>✔️</td>
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<td>PL-51056</td>
<td>Liz Norton</td>
<td>NAMI Family-to-Family</td>
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<td>NAMI In Our Own Voice</td>
<td>Leader Designation</td>
<td>✔️</td>
</tr>
</tbody>
</table>
Managing Program Leaders

Information

Program Leader ID

Master Program Leader

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

NAMI Northern Virginia

NAMI Ending the Silence

NAMI Virginia

New Program
### Education, Training And Programs

<table>
<thead>
<tr>
<th>Program</th>
<th>Dates</th>
<th>Location</th>
<th>Details &amp; Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grupo de Apoyo para Familiares de NAMI</td>
<td>11/13/2017</td>
<td>Houston 77079</td>
<td>Details &amp; Registration</td>
</tr>
<tr>
<td></td>
<td>Meets every 2nd and 4th Monday at 7:00 PM.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grupo de Apoyo para Familiares de NAMI</td>
<td>11/13/2017</td>
<td>Houston 77079</td>
<td>Details &amp; Registration</td>
</tr>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Grupo de Apoyo para Familiares de NAMI</td>
<td>11/13/2017</td>
<td>Houston 77079</td>
<td>Details &amp; Registration</td>
</tr>
<tr>
<td></td>
<td>Meets every 2nd and 4th Monday at 7:00 PM.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

There are more programs scheduled! See [NAMI Greater Houston's full program list](http://www.namigreaterhouston.org).

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*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
Listing/Capturing Program Information

New Program Listing: NAMI Program

Information

- Program Listing Name

- NAMI Affiliate
  Search Accounts...

- NAMI State Organization
  Search Accounts...

Facility Name

Room Name

Program

- Search Programs...

Record Type
NAMI Program

- Start Date

- End Date

Start Time

End Time
Listing/Capturing Program Information

<table>
<thead>
<tr>
<th>PROGRAM LISTING ...</th>
<th>NAMI AFFILIATE</th>
<th>PROGRAM</th>
<th>CONTACT NAME</th>
<th>RECORD TYPE</th>
<th>STAR</th>
<th>END</th>
</tr>
</thead>
<tbody>
<tr>
<td>NAMI Peer-to-Peer</td>
<td>NAMI Northern Virginia</td>
<td>Peer-to-Peer</td>
<td>Liz Norton</td>
<td>NAMI Program</td>
<td>6/27/2019</td>
<td>8/22/2019</td>
</tr>
</tbody>
</table>

**Details**

- **Related**

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

<table>
<thead>
<tr>
<th>Program</th>
<th>NAMI Affiliate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peer-to-Peer</td>
<td>NAMI Northern Virginia</td>
</tr>
</tbody>
</table>

**Details**

<table>
<thead>
<tr>
<th>Program Data Reports (0)</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Listing Leaders (1)</td>
<td>New</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PROGRAM LISTING L...</th>
<th>PROGRAM LISTING LEA...</th>
<th>PROGRAM LEADER</th>
<th>START DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLL-0006824</td>
<td>Liz Norton</td>
<td>PL-82952</td>
<td>View All</td>
</tr>
</tbody>
</table>
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

Cancel  Next
Listing/Capturing Program Information

Information

Program Listing Leader Name

Record Type
Standard

Program Listing
NAMI Peer-to-Peer

Program Leader
Liz Norton

Program Leaders

<table>
<thead>
<tr>
<th>PROGRAM LEADER ID</th>
<th>CONTACT</th>
<th>PROGRAM</th>
<th>RECORD TYPE</th>
<th>ACTIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>PL-82952</td>
<td>Liz Norton</td>
<td>NAMI Peer-to-Peer</td>
<td>Local</td>
<td>✔</td>
</tr>
<tr>
<td>PL-82788</td>
<td>Liz Norton</td>
<td>NAMI Family-to-Family</td>
<td>Local</td>
<td>✔</td>
</tr>
</tbody>
</table>
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 namieducation@nami.org for assistance.

[Learn more about reporting program data](#)

## Program Data Reports

<table>
<thead>
<tr>
<th>Program Data Reports</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>ID</th>
<th>Program Listing</th>
<th>Start Date</th>
<th>Date of Sup...</th>
<th>Created Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PD-0215</td>
<td>NAMI Family-to-Family</td>
<td>3/1/2019  9:51 AM</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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
Where to Learn More About NAMI 360

Have a question?
VISIT THE HELP CENTER

NAMI Online Knowledge Center ➔ NAMI 360

Getting Started
- How do I log into NAMI 360?
- How do I navigate NAMI 360?
- NAMI Salesforce Glossary

Managing Constituents
- How do I add a new contact?
- How do I view all my contacts?
- How do I edit a contact?
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