NGO Connect Administrators Guide

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NGO Connect and Advancement Connect are Foundation and Higher Education managed applications on the Salesforce.com platform. This guide attempts to address what is specific towards administering NGO Connect and Advancement Connect that may be different from administering a standard Salesforce.com organization. General administration of a Salesforce org will be referenced in conjunction with how to administer NGO Connect or Advancement Connect; however, this guide does not attempt to provide an overview of how to be an administrator on the Salesforce platform. Like any Salesforce Managed Package, NGO Connect and Advancement Connect provide features via package installations or upgrades. The release cycle of the product follows that of Salesforce.com: Spring, Summer and Winter releases.

Working as an NGO Connect Administrator

As an NGO Connect Administrator, you have the ability to configure and manage NGO Connect in order to ensure that your organization gets the most out of its features and functionality. NGO Connect Administrators generally create and manage user profiles, configure custom settings, run reports, set up batch entry jobs, build online donation forms, and perform a variety of other maintenance tasks. This guide provides instructions for how to best govern NGO Connect, and how to perform general administration tasks, including creating household accounts and contacts, establishing custom settings, and setting up payment processing. You should have some familiarity with Salesforce and NGO Connect before attempting to use this guide. For a more general overview of the features and functionality in NGO Connect, see the roundCause Product Manual.

Information Contained in this Guide

This guide covers the following topics:

- What Does an NGO Connect Administrator Do? - An introduction to the day-to-day tasks an Administrator masters using NGO Connect.
- NGO Connect Configurations - A description of some areas of functionality that are unique to NGO Connect (different from standard Salesforce functionality).
- Accounts and Contacts - An overview of accounts, contacts, and the various record types that apply to households and organizations, as well as details on adding and editing account and contact information.
- Fundraising Campaigns - Details on defining and customizing fundraising campaigns and setting up campaign source codes and rollups.
- Giving - A summary of giving record types and the giving functionality in NGO Connect (referred to as "Opportunities" in Salesforce).
- General Accounting Units and Special Allocations - Information on how Giving records can be associated with General Accounting Units (GAU) and how General Accounting Units are used to track funds.
- Payment Processing - A list of supported payment processors and details on setting up payment processing.
- Form Builder - A discussion of the Form Builder tool and the data it captures.
- Event Campaigns - A breakdown of the aspects of events that you can manage with Event Campaigns, including definitions of "Standalone" and "Integrated" events.
- Batch Gift Entry - Discussion of the Batch Gift Entry interface, an in-depth description of batch gift entry functionality.