



Technology Consulting in the Community

Spring 2014

**Sweta Bardoloi
Union Project
Final Consulting Report**

**Carnegie Mellon University
Pittsburgh, Pennsylvania
www.cmu.edu/tcinc**

Carnegie Mellon University

Union Project

Executive Summary

Student Consultant, Sweta Bardoloi
Community Partner, Michelle Clesse

I. About the Organization

Union Project is a non-profit organization, whose purpose is to create a neighborhood space, where people could come together to connect, create, and celebrate for fellowship, creativity, community, learning, and more. The mission statement of Union Project is to “*Make space to create, connect, and celebrate community.*” They offer space rentals at a nominal price, hosts events and classes for several recreational activities like yoga, pottery, and ceramics.

Michelle Clesse is an alumni of Carnegie Mellon University and the Communications and Development Manager of Union Project. She implements communication and donor plans, manages marketing, PR, and fundraising. She worked closely with the student consultant during the process of set up and migration of data records to the organization’s new CRM, Salesforce.

II. Data Cleanup and Migration of visitor records from Filepro to the new CRM, Salesforce

The current database, Filepro, has no way of detecting duplicate records. There are no clear “search” mechanisms and unique identifiers for contacts and visitor roles. As a result, hundreds of duplicate records are present. Data extraction often resulted in confusion, inaccuracy of results and manual clean-up of the results was time consuming.

The solution identified for these shortcomings was migrating to a new CRM, Salesforce, which will facilitate unique identifiers and powerful search mechanisms. The records hence entered and exported are expected to be accurate, reliable, and time efficient.

III. Event and Payment Management / Synchronized Calendars

Union Project currently manages their events in Google Spreadsheets and Google Calendar. There is no automatic way to connect space rentals and its payment or update them automatically to the calendar. Records like scheduled events, leases and payment information are maintained by entering every detail manually on Google Spreadsheets and thereafter to the calendar. Hence, there are internal and external calendars to mark various events.

This exposes the possibility of double booking a space at a same time. Also, it is an overhead manually entering lease details into the Google Calendar every time.

The approach to tackle this problem is to have a tool specializing in donor, event and payment management, which would take care of unsynchronized calendar events and payments issues implicitly. The tool should be also be integrate able to Salesforce so that relevant payment, event and lease information can be related to the contacts.

IV. Outcomes

The major outcomes of this project can be summarized in to the following:

1. *Prevention of data duplication*

There are unique identifiers for contact records and Salesforce offers efficient search filters, so attempts to update existing contact information doesn't result in creation of duplicate records. Hence, redundancy of data is controlled. Since Salesforce stores data in the cloud, it offers more capacity and portability. Additionally, in contrast to the local Filepro system, it is a sustainable system because it is not vulnerable to risks of data loss owing to reasons like system crash/bugs.

This mission can be completed more smoothly by hiring an external consultant who has relevant expertise in Salesforce. This would ensure that minor technical hurdles are handled efficiently and the migration process is more paced as the consultant is specifically trained to provide the same.

2. Track detailed contact information

Several customized fields have been incorporated to the contact records to track and relate information like family members, enrollment in Yoga, Zumba etc. classes, visitor roles like donor, ceramics student, staff etc.

This enhances the process of tracking customer information for various business objectives. It also helps to prevent redundancies since more filters can be set on "search" operations.

This is a sustainable system because the community partner was involved during the creation of these custom fields. It also offers scalability as more custom fields can be added later by the community partner to cater to requirements in the future.

Key Recommendations

In the interest of further technology development and efficiency, I would like to recommend the following:

1. Hiring an external consultant as complete migration and maintenance of a CRM demands expert technical guidance and support.

Hiring an external Salesforce consultant works highly in favor of the organization since he professional would possess the required skills and knowledge that can be appropriately applied in order to help the organization achieve the objectives set.

2. Regular involvement with Student Consultants/interns for development of CRM, website and advertisement

Presently, the organization depends on social media like Facebook, their website, and word of mouth for publicity. They can increase their publicity by focusing on more means of advertisement.

A significant number of visitors sign up for the events online, so having an attractive website is desirable. So if they can invest enough time, signing up student consultants/interns on a regular basis can help them achieve the above.

My name is Sweta Bardoloi. I'm a 2014 batch graduate student pursuing Information Systems Management at Carnegie Mellon University

Community Partner

Michelle Clesse
michelle@unionproject.org

801 N Negley Ave
Pittsburgh, PA 15206.
<http://www.unionproject.org>

About the Consultant

Sweta Bardoloi
sbardolo@andrew.cmu.edu

Sweta is a 2014 batch graduate student pursuing Information Systems Management at Carnegie Mellon University.

Union Project

Final Consulting Report

Student Consultant, Sweta Bardoloi
Community Partner, Michelle Clesse

I. About the Organization

Organization

Union Project was evolved as an idea by a group of young Pittsburghers who wanted to help create a healthy environment in the neighborhood by involving the society into several recreational activities. The once dilapidated Union Baptist Church, built in 1904, now belongs to Union Project. They offer office space rentals and halls for events to other non-profit organizations and individuals at a nominal price. They also host a number of recreational activities and classes at nominal prices. They've often proved to be a launch pad for other small organizations and artists that achieved recognition here. Currently, they have over 1,000 youth involved, around 400 families, and emerging artists which leads to around 25,000 people visiting them every year.

Facilities

The organization has a lobby with a reception desk leading to the Great Hall, which is often leased out for functions like weddings, funerals etc. There is also an Atrium which can be rented for smaller functions. These halls are decorated with antique lights and paintings, and the presence of beautifully crafted glass windows is dominant. There is a board room which is often used by the organization for team meetings in addition to space rentals. On the top floor, there are around 10 office spaces which are leased to other small organizations. The office room of Union project is shared by a team of three. In the basement are the workshops for various recreational activities. It also has small office room there which is used by the organization.

Programs

Union Project hosts a range of popular recreational activities and also facilitates other volunteers to offer workshops and classes like:

- Ceramics
- Pottery
- Carpentry
- Yoga
- Zumba etc.,

over which people can connect. The basement has studios for ceramics, pottery, and carpentry and there is a set up for kilns, pottery wheels and the likes.

The office rentals, personal functions like weddings, funerals and the likes are the other major programs of this organization.

Staff

Jeffery Dorsey is the Executive Director heading the organization and maintains strategic vision. He oversees cash flow management, staff, and committees and maintains relationships with other

foundations and investors. He would interact with the CRM primarily for viewing funder information and pipelines.

Carol Spencer Royall is the Director of Space Rental Programming and is responsible for managing space rental programming, facility use and maintenance. She also manages finances, the custodian and community liaison. Her interactions with the database mainly include scheduling/maintaining leases and their payments.

Michelle Clesse, the Communications and Development Manager, is a technically proficient member of the team and is responsible for data collection, database maintenance and data analysis. Her responsibilities necessitate heavy interactions with the database of the organization. She has sound knowledge about Database Management Systems and so was in charge of the transition and setting up of the new database. Since she was closely involved in the process of data migration, she will be the key point of contact of the organization for Salesforce related information.

Jenna Vanden Brink is the Ceramic Program Manager who manages ceramic programming, co-op members, and artists-in-residence, in addition to studio and equipment maintenance. She will interact with the CRM for event management and ceramics programs information.

Abbie Miller, the Community Liaison, is available at the reception and directs the visitors. She will interact with the CRM by recording visitors' information. On contrary to the previous manual pen and paper data entry practice, she can now directly enter contact information to Salesforce.

Technology Infrastructure

The organization has:

- Windows 4 desktop computers: 1 Windows 7 machine, 3 Windows 8 desktop computers, 1 Windows 8 laptop, and 1 Macbook.
- Internet is available via LAN and Wireless connections.
- Website is built on Drupal.
- Printer/Scanner is available.
- Employees sometimes carry their personal Windows laptop/ Macbook to work.

Softwares used are:

- Adobe Creative Suite
- Microsoft Office
- FilePro for maintaining visitor information.
- ADP and Bookminder for payroll and maintaining finance
- Salesforce is the new CRM
- Click & Pledge soon to replace Paypal and be implemented for payment and event management.

Technology Management

There is no dedicated IT support. There's a contract IT person who visits the organization on a requirement basis. However, there's a group of technically knowledgeable volunteers across a group of several non-profit organizations, known as the "Task Force", who extend their support when need be.

Technology Planning

There are no well laid technology plans. There is no budget set explicitly for technology. Decisions are made to spend on technology development and maintenance in an ad hoc manner as needs arise.

Internal and External Communication

Since most of the team is seated in the same space, communication is primarily face-to-face. There are intercoms present to communicate to the staff seated elsewhere. They also communicate over phone and text messages.

The organization has mailing lists for the external communication. They send out emails to interested parties for several events like fundraising, ceramics workshop etc. There are several lists like General, Do not solicit, Do not mail etc. They also circulate E-newsletters via emails. They have also active Facebook, Twitter, and LinkedIn profiles.

Information Management

Visitor information is currently stored in Filepro. The visitors fall into one or more of the following categories:

- frequent visitors who work for and in Union Project
- donors
- visitors who are enrolled in one or more recreational classes and activities
- first time visitors and visitors who had rented the halls or the board room.

Every time they visit the organization, a manual entry used to be made on paper by the Community Liaison and then later transferred to the database. Each visit, payment and activity is recorded.

A significant amount of paper work was involved since every visit is manually recorded. It's time consuming to further re-record everything in to the database. There were a lot of duplicate records of visitors and roles.

All these shortcomings contributed to the need for a new CRM in order to manage information better. They had pre decided on Salesforce and required guidance from the student consultant to start with the migration process.

II. Automatic Data Duplication Detection

Motivation

Union Project used to store customer and volunteer records solely in a flat file system, FilePro. A "find" was performed on the database before entering a new visitor entry. Since there was no clear unique identifiers for the records, visitor profiles were being inadvertently created more than once. In an attempt to search through the database thoroughly before creating a new record,

all records used to be captured manually on paper and then entered into the database. There were hundreds of duplicate records present. Also, the roles a visitor was tagged with could be redundant since there was no unique identifier for the roles.

This leads to major redundancy when data needs to be exported from the database towards various objectives. As for example, when visitor records were exported for maintaining a roster for any class, there were several duplicate records. This resulted in a lot of unreliability as there was lack of precision of data count. Same information was presented more than once so this often led to confusion. The only way to get rid of them was manually and the effort required to scrutinize the data and filter out unwanted entries proved highly time consuming.

The approach to tackle and prevent this problem was to move to a new relational database management system, Salesforce. It is a highly powerful and popular CRM that is used to store customer records and accounts in organizations. Salesforce was pre decided upon by the Community Partner and wanted the guidance of the student consultant for the migration.

The action or approach that was recognized to achieve a smooth and efficient migration is to create a sandbox in it so that the process can be tested at every step before making the actual migration to the platform. The process was initiated with a trial of 15 records. The records were exported to a csv file from Filemaker for the migration process. As the number of records increased to over a hundred, a heavy amount of manual filtering of reports in to a csv file was required in order for them to be update-ready into the CRM.

In order to cater to the requirements and the wish list items of the organization, several customization has been done to the Contact record fields. Task 3 will illustrate in detail about the customizations. The cleaning process was iterative because after every customization that done to the Contacts, we tested if the records import met the desired purpose and efficiency. The cleaning of the import files was done by the consultant and the Community Partner.

Outcomes

During the initial phase, two major hindrances faced in Data Migration were:

1. Mass Import options: Some custom fields didn't allow mass import option from a csv file as it required data to be entered individually, which is impossible for thousands of records. For Ex.: Every contact belongs to the primary account, *Union Project*, and a single contact might be part of more than one of the Community Classes under Union Project. The most straight forward approach allowed only one contact to be added a time to these classes. The information available online and hit-and-trial approaches helped the consultant to address this issue and mass import the information by using csv files.
2. Duplicate Record creation: The most straight forward method for data import in Salesforce creates a new contact when attempts were made to update an existing contact record. Research on resources done online helped the consultant to address this issue by modifying the update csv files' fields to detect duplicate records and update them, as required.

The present outcomes, when compared to the previous situation, can be summarized as:

- There are unique identifiers for contact records, so attempts to update existing contact information doesn't result in creation of duplicate records.

(Refer to Figure Snapshot 1)

- Salesforce provides with efficient search and filter options, ensuring significant reduction of anomalies in search results. In addition to ensuring accuracy of results, this also proves to be time efficient for the employees since it eliminates the need to manually filter the results.

(Refer to Figure Snapshot 2)

- Visitor information can be entered very quickly in to the CRM as it has a very user friendly interface, eliminating the need to make paper entries and subsequently to the database. This proves to be time efficient and hence more productive for the employees.

(Refer to Figure Snapshot 3 and Snapshot 4)

Due to the scope of the project, multiple trial attempts, lack of expert guidance, manual clean-up of csv files and time constraints, approximately 230 contact records could be migrated to the sandbox, during the duration of this project. As a further implementation, the entries can be imported to the main Salesforce profile by the organization once the sandbox proves to be stable as desired and caters to the requirements.

A few key points:

- The space available for data storage in Salesforce is 1 GB and 16 GB for file storage, in comparison to the local server storage capacity for Filepro.
- It makes the system more flexible since the staff access the database from any device that has a browser and internet.
- Since Salesforce stores data in the cloud, in contrast to the local Filepro system, it is not vulnerable to risks of data loss owing to reasons like system crash/bugs. This ensures sustainability.
- It is also expected to be a sustainable system because the community partner was actively involved in the entire process. She can smoothly guide through the implementation of the later phases. So, there is no foreseen loss of process information on the departure of the consultant.

III. Event and Payment Management/ Synchronize Calendars

Motivation

Union Project currently manages their external events (events hosted by third parties) in Google Spreadsheets and Google Calendar. The payments made by the visitors via Paypal are registered to the file system manually against their contact record.

Currently, the workaround is achieved by entering every detail manually on Google calendar and spreadsheets. For example, for every lease deposit made, the Community Liaison enters the information in a Google spreadsheet and then the Director of Rental Space Program enters the

same on the Google Calendar after creating the lease. As a result, there are internal and external calendars to mark various events.

Another instance of inefficiency is advocated by the process of manual updating a scheduled event in to the Calendar, after making an entry to the spreadsheet.

These processes makes the system vulnerable to human errors like double booking an event/lease, missed lease/event booking, missed payment record etc. Moreover, the events and payments are strongly related to the calendar since the organization tracks every activity, event and payment as a part of their business requirements. The organization desired an automatic way of handling these limitations.

Union Project needed a Salesforce integrable tool that could take care of payments and events. On recommendation of Larry Hokaj, the mentor of the student consultant, *Click & Pledge*, a donor management system, was suggested to the organization. Larry has experience in guiding non-profit organizations in adoption of Salesforce, Click & Pledge and the likes. This tool specializes in providing payment and event management services, and is expected to take care of unsynchronized calendar events and payments issues. The organization decided to adopt Click & Pledge due to the ideal match of requirements with the features provided.

Outcomes

The tool has not been installed yet. But the expected outcomes, as portrayed by the Click & Pledge executive, are:

- Event registration
- Automatic payment receipts
- Free recurring payment
- Free part payment
- Online fundraising
- Free part payments
- Fancy ticketing
- Automated money refund facilities
- Invoicing etc.

In addition to catering to the requirements and beyond of the organization, this tool would save them at least \$10 a month, in comparison to Paypal, where they used to pay \$30/month plus 2.75% - 15% for every transaction, while with Click & Pledge, they'll pay \$20/month plus (3%+\$0.30)/transaction.

Union Project set has an account with it but has not implemented yet. This delay is attributed to the insufficient staff capacity. Michelle's bandwidth is low for this project at the moment, but she plans to collaborate with the Click & Pledge support to install and set it up in the near future. Since it is a paid service, there is no probability of it being not implemented. At a later phase, it is planned to be integrated with the CRM, Salesforce.

A few speculations can be made regarding the capacity and sustainability of the product:

- It is expected to be a sustainable system, as there is basic technical support available for troubleshooting problems. There are also chargeable exclusive, upgraded support services available.
- The scalability and efficiency will highly increase as the processes will be automatic now.

IV. Customized Contact Information

Motivation

This task is an outcome of implementing a few of the wish list items. These items were collected by the student consultant during the Requirements Gathering phase.

Union Project requires several other information to be recorded about a visitor other than the standard ones available in the Salesforce contact page. To name a few, they like to track:

- Enrollment in Yoga, Zumba classes etc.,
 - Visitor roles like donor, ceramics student, staff etc.,
 - Relate contact information like family members,
- as these enhance the process of tracking customer information for various business objectives and decisions.

A few of the wish list items are:

- Contacts might have more than one role: Volunteer, Visitor – Occasional, Employee, Donor, Ceramics student, Community Class student etc.
- They should belong to the account “Union Project”.
- Track their activities in the organization.
- Define relationships between visitors belonging to a family.
- Trigger the list of community classes offered if a contact is checked as a *Community Class* student.
- Trigger a pick list to choose the current status if a contact is a board member.
- A contact can be in more than one community class like Yoga, Zumba, etc.
- Contacts should have mail and email opt-out options, with the default being set to “No”.

As there was no external expert help available, complete dependence was on the resources and blogs available online for the custom field creation. After several trial attempts, the student consultant, in cooperation with the community partner, was successful in customizing the records in order to fulfill the wish list items.

The student consultant also received helpful tips on multiple role creation from her colleague, Yizhou Wu, who’s working with Thomas Merton Center and had the guidance of an external Salesforce consultant.

Outcomes

Project requires several other information about a visitor to be recorded other than the standard ones available in the Salesforce contact page.

The major challenge was to efficiently assign multiple roles to contacts.

The task resulted in the following outcomes:

- Contacts can have multiple roles.
- They belong to the account “Union Project”.
- Members belonging to a family can be related.
- If a contact is checked as a *Community Class* student., a multi select list of community classes is triggered
- If a contact is checked as a Board Member, a pick list of their current status is triggered.
- A contact can be in more than one community class.
- Contacts have mail opt out option, with the default being set to “No”.
- Contacts have email opt in option, with the default being set to “Yes”.

(Refer to Figure Snapshot 5)

Tracking a contact’s visit activity can now be done by entering information in a text field. A more desirable way would be able to add a calendar field to a contact. Attempt had been made to incorporate this feature such that multiple visits of a contact could be recorded. However, the result allowed only one visit to be stored per field. Though there is no straight forward method to do this, this requirement can be considered for implementation in the future.

Key points:

- The contact page has a user friendly interface so data entry can be expected to be seamless even by non-technically proficient staff members.
- The community partner was involved in the process the field creation as well populating these custom fields. So the system can be expected to sustainable as there is no loss of information.

V. Recommendations

Vision

Union Project works towards creating a neighborhood space where people could come together to connect, create, and celebrate for fellowship, creativity, community, learning, and more. Their mission requires them to avail the benefits of technology to make their work easier. An ideal visitor database system would allow them to store and manage thousands of records efficiently. As they have already embarked on moving their CRM to Salesforce, the next step would be measures to support and sustain it. Also, given the increasing dependency in technology today, an ideal situation would be them being self-sufficient to plan and expand their technology infrastructure and information management, in addition to developing and maintaining their technical requirements.

Goals

1. Hiring an external consultant as they do not have any technical help and completely migrating and maintaining a CRM needs expert support.
2. Continue getting Student consultant /intern to guide them with their changing technical needs, as they do not have dedicated technical support. Also they can have interns for advertisement and social media.

Strategies

1. Hiring an external Salesforce Consultant

Background

Currently the Community Partner has no dedicated budget for IT development and Management. The process of migrating the CRM to Salesforce requires a lot of expertise and prior knowledge on the software since it is very powerful and complicated. There were hindrances in the process of data migration as the Student Consultant or the Community partner didn't have the experience or the expertise in Salesforce to solve complicated requirements in a speedy manner.

Justification

Hiring an external Salesforce consultant works highly in favor of the organization since he professional would possess the required skills and knowledge that can be appropriately applied in order to help the organization achieve the objectives set. The current problems were dealt or mitigated with the help available online and a major part of had to be done manually. This led to anomalies and often, previous work had to be undone after realizing certain requirements were not being met. The hit-and-trial approaches and several hours of unproductive research online can be avoided if there's expert help.

The incorporation of this recommendation will help Union Project save a couple of months, given the huge magnitude of 6000 records that need to be cleaned and migrated.

Approach

Currently, Union Project has no explicit budget set for Technology and Development. The steps involved towards achieving this recommendation would be:

1. Look up for external Salesforce Consultancy Services moderately priced specially for non-profits, in Pittsburgh.
2. Designate a budget specifically for an external consultant.
3. Review the work phase plan laid out by the Student Consultant and the Community Partner and commence implementation of phase 2.

Expected Outcomes

A fault-free, sustainable, one-strike migration to Salesforce, keeping intact the complex requirements of the database. The duration of implementation taken would be significantly shorter as the consultant would be aware of the best practices to implement the requirements. The external consultant might also offer technical support when required, and that ensures sustainability. Having a fully set up CRM would make data entry easier, practical and scalable.

Resources

There are several Salesforce expert consultants who are known for offering good service at a nominal price.

- Eac2 specializes in providing database set up, donor and event management services to non-profit organizations at an attractive price. More details are available on: <http://www.eac2consulting.com/services/non-profit-organizations/>
- Kelly Partners and Acute Edge other examples. More information about them are available on their websites: <http://www.kellpartners.com/>
<http://www.acutedge.com/>

2. Regular involvement with Student Consultants/interns for development of CRM, website and advertisement

Background

Presently, the organization depends on social media like Facebook, their website, and word of mouth for publicity. They can increase their publicity by focusing on more means of advertisement. A significant number of visitors sign up for the events online, so having an attractive website is desirable. So if they can invest enough time, signing up student consultants/interns on a regular basis can help them achieve the above.

Justification

As Union Project doesn't have a designated team for Technology development or advertisement development, they might consider having a student advertising intern/consultant work with them. The intern can use his/her advertising knowledge to create more awareness for the mission of Union Project and connect to more people to the organization.

Similarly, since budget is a constraint, they can get an intern having expertise in web development to improve their website. A well-structured, easy to use, attractive website can be always appreciated.

Lastly, they can continue to associate with student IT consultants to help them review and implement the other 3 phases of CRM development and sustainability plan as laid out by the Community Partner and the student consultant.

Approach

In order to realize this recommendation, they can follow one or more of the following strategies:

1. Research for local universities/schools that specialize in advertisement courses. They can get interns at no or nominal costs to help enhance advertisements. The candidate requirements would be:
 - Computer literate
 - Excellent oral and written communication skills
 - Able to use media equipment
 - Well equipped with social media
 - Knowledge of advertising laws and standards
 - Ability to analyze and interpret data
2. Get summer/ semester long interns passionate about web development and are willing to help them in upgrading their website at no or a nominal cost.
3. Continue getting student IT consultant to help them complete the CRM migration phase, realize all the wish list items.
4. Get the web developer intern and the student consultant to work collaboratively to achieve such that the registrations and payments made online are automatically reflected in Salesforce and Click & Pledge.

Expected Outcomes

The expected outcomes can be listed as:

- More advertisement and hence more publicity of Union Project.

- An enhanced website for Union Project.
- A more manageable and sustainable CRM.
- Their wish list items of all the phases are realized.

Resources

Carnegie Mellon University's Heinz College offers several courses that require mandatory summer internship. They can get in touch with the career services to hire summer interns having web development expertise to help them improve their website.

<http://www.heinz.cmu.edu/jobs-and-internships/index.aspx>

Continue signing up for student IT consultants from the IT Consulting course taught in Heinz College. <http://www.cmu.edu/tcinc/about/bg.html>

About the Consultant

My name is Sweta Bardoloi. I'm a 2014 batch graduate student pursuing Information Systems Management at Carnegie Mellon University. Prior to this, I used to work for Hewlett Packard, Bangalore, India, as a Systems Software Engineer for 2 years. I feel that good managerial skills and business acumen are vital qualities of an efficient technical professional, so I decided to pursue higher studies at CMU. After graduation, I see myself placed as a Business Analyst in a major financial firm.

Appendices

C

CRM: Customer Relationship Management. It is a system for managing a company's interactions with current and future customers. It involves using technology to organize, automate and synchronize sales, marketing, customer service, and technical support.¹

[1] http://en.wikipedia.org/wiki/Customer_relationship_management

Cloud: Cloud storage is a model of networked enterprise storage where data is stored in virtualized pools of storage which are generally hosted by third parties.¹

[1] http://en.wikipedia.org/wiki/Cloud_storage

S

Snapshot 1:

Contact Detail

Edit
Delete
Clone
Request Update

Name	Kathryn Sitter	Contact Owner	Michelle Clesse [Change]
Account Name	Union Project	Reports To	[View Org Chart]
Title		Department	
Email	kasitter@gmail.com	Last Stay-in-Touch Save Date	
Mobile		Fax	
Mail Opt Out	☐		
Email Opt In	☐		
Partner/Spouse	Robert Bingham		
Child 1	Maya Bingham		
Child 2			
Family			
Relationship	Partner is Robert Bingham. Mother is Kathryn Sitter.		
Visits			
Add Date			
Active Date			
Contact Number	5		
Contact ID			
Community Class Attendee	☐		
Parent 1			
Parent 2			

▼ Address Information

Mailing Address
7008 Thomas Blvd. , Pittsburgh, PA 15208
Pittsburgh, Pennsylvania 15208
United States

Chat

Snapshot 2:

▼ Step 3: Find Contacts that match the following criteria:

First Name	▼	equals	▼		AND
Mailing Zip/Postal Code	▼	equals	▼		AND
--None--	▼	--None--	▼		AND
--None--	^	--None--	▼		AND
Name		--None--	▼		
Salutation					
First Name					
Last Name					
Account Name					
Account ID					
Account Parent Account					
Reports To					
Contact Record Type					
Mailing Street					
Mailing City					
Mailing State/Province					
Mailing Zip/Postal Code					
Mailing Country					
Mailing State/Province (text only)					
Mailing Country (text only)					
Phone					
Fax					
Mobile					

ing multiple items in the third column, separated by commas.
in following format: 4/28/2014
alue in following format: 4/28/2014 11:38 PM

Search

s will not be deleted.
users will not be deleted.

ords. When this option is selected, you cannot restore deleted records from the Recycle Bin. Please be careful when selecting this option.

Snapshot 3:

Quick Create

First Name

*Last Name

Account

Phone

Email

Save

Snapshot 4:

Address Information

Mailing Country: United States

Mailing Street:

Mailing City:

Mailing State/Province: --None--

Mailing Zip/Postal Code:

Description Information

Activities:

Role: Available

- Board Member
- Ceramics Co-op Member
- Ceramics Open Studio
- Ceramics Student
- Donor
- Staff
- Volunteer
- Ceramics Custom Program Attendee
- Prospect

Chosen

Classes: **Not Applicable**

[Chat](#)

Snapshot 5:

Name	Heather Mediate	Contact Owner	Michelle Clesse [Change]
Account Name	<u>Union Project</u> Account is Union Project	Reports To	View Org Chart
Title		Department	
Email	hnmediate@mac.com	Last Stay-in-Touch Save Date	
Mobile		Fax	
Mail Opt Out	☒ Mail Opt Out		
Email Opt In	☒ Email Opt In options		
Partner/Spouse	<u>Marc Mediate</u> Family/Relationships		
Child 1			
Child 2			
Family			
Parent 1			
Parent 2			
Relationship	Marc Mediate is husband		
Visits			
Add Date			
Active Date			
Contact Number	156 Unique Contact ID		
Role	Ceramics Student; Donor Multiple Roles		
Community Class Attendee	☒ Multiple Community Class Attendee		
Classes	Black Yoga; Game Night; Hooping		
Board Member	☒ Board Member and current status		
Board Member Status	Past		

▼ Address Information

Mailing Address: 1439 Jancey St
Pittsburgh, Pennsylvania 15206
United States