# Implementation Plan for:

## Information Management Platform:
## A Solution to Tracking Caras con Causa's Impact on Cataño and Guaynabo


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**Report Submitted to:**
Caras con Causa
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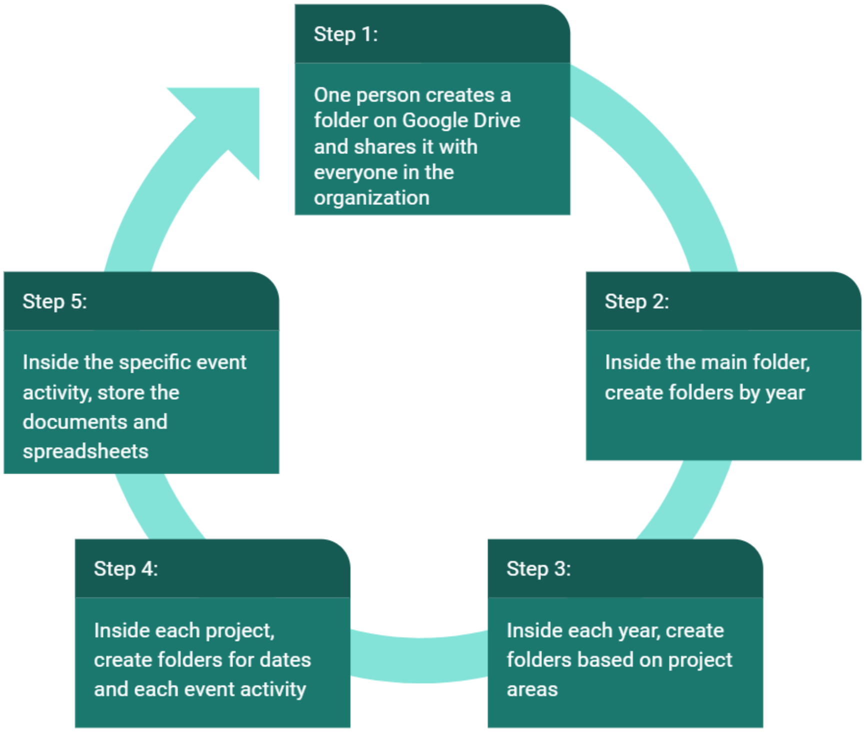
# Table of Contents

## Overview

In order for Caras con Causa to be able to transfer to Salesforce, there are guides and video tutorials in this document to help easily convert from Google Drive. It is best that the organization follow this document in order to make the most out of Salesforce. The first couple videos are on how to centralize a Google Drive folder for the entire organization, and how to create a single Google Form to collect all contact information. In order to easily transfer data into Salesforce, it needs to be centralized in Google Drive. Next, the organization begins setting up and customizing Salesforce by following Steps 3-9. After everything is set up and transferred into Salesforce, and the organization is comfortable using the platform, they can start using Automate.io to automate some processes. We include videos on how Google Forms answers and events created in Squarespace be placed directly into Salesforce. These steps and videos are to help the organization transition into a better information management platform.

## 1. Google Drive Set-up

The organization needs to first set-up a Google Drive folder for everyone in the organization to have access to. This is important because until the organization has Salesforce up and running, it is important to have the project information collected in a centralized location. As this is in the folder for the entire organization, it will also eliminate the need to message on WhatsApp asking to be emailed a link to a document. The person wanting to see a file can go into the Caras con Causa folder and find it themselves.




For more detailed instructions, watch the video below:
https://drive.google.com/file/d/15DOEicbeBAi8wQEgu0Y9Y3OlfL4QkCiN/view?usp=sharing

2. **Centralizing data in one Google Sheet with a Google Form**

After the organization has a centralized location for all of the projects, a Google form can be made and properly stored. This Google Form will allow all the needed contact information to be collected in one Google Form and then stored in one Google Sheet which will allow for easy transfer when uploading into Salesforce.

https://drive.google.com/file/d/1QYwx6iX-5kGz9oJAgi1-LOr7dw0kbQJP/view?usp=sharing

I forgot to mention at the end, the Google Form and Sheet with answers can and will be accessible in the folder that the form was started in. Here, it was started in the Caras con Causa main folder and it can be found there. However, this could be created inside any folder the organization wishes, as long as it is somewhere in the Caras con Causa folder

### 3. Salesforce Glossary

This is a list of words used in the videos and guidelines to show their meaning within Salesforce versus their definition when they are used in our process.

*Salesforce terminology definitions*

| Terminology | Definition in Salesforce | Definition in our process |
|---|---|---|
| Objects | The type of information being collected. e.g.Contacts | The same |
| Fields | part of an object that holds a specific piece of information. e.g. Phone Number | The same |
| Accounts | A consumer or company that their information is being tracked. Also could have members. | An organization a contact is a part of or the contact itself. |
| Contacts | The people that the organization is connected with and is keeping their information. | Any person Caras con Causa meets in an event or in other ways. |
| Reports | Presents a set of information based on a set of criteria chosen for columns and rows. | The same |
| Campaigns | A marketing initiative to generate prospects and build brand awareness | The projects in Caras con Causa. e.g. LabCom |
| Campaign Hierarchy | Includes a Parent Campaign with many child campaigns. | How the projects related to one another as well as the events in these projects. |

| | | |
|---|---|---|
| Parent Campaigns | The overarching campaign with child campaigns related to it. | The overarching project that contains different types of projects in which specific events happen. e.g. LabCom(parent campaign) has LabCom experiments and LabCom Donor meet up as child campaigns. Both of the child campaigns have specific events. |
| Events | The organization's planned activities. | The same. e.g. LabCom experiments campaign has three events on Monday the 3rd. |

*Note.* Adapted from Training: Salesforce. (n.d.).https://help.salesforce.com/articleView?id=sf.glossary.htm&type=5.

### 4. Video on Instructions to Customize Fields on Salesforce

Before the organization can successfully transfer their information to Salesforce they first need to customize the default fields on Salesforce based on the types of contact information they would like to collect.

https://drive.google.com/file/d/1DFasoP0IWE_lYByo2ns_vjBnP-kG4E_Z/view?usp=sharing

## 5. Transferring contact information from Google Sheets to Salesforce

After customizing the fields they can transfer their contact information from Google Sheets to Salesforce using the steps below or following the instructional video.

**1.** Customize the fields

**2.** Click on import button and attach the CSV file.

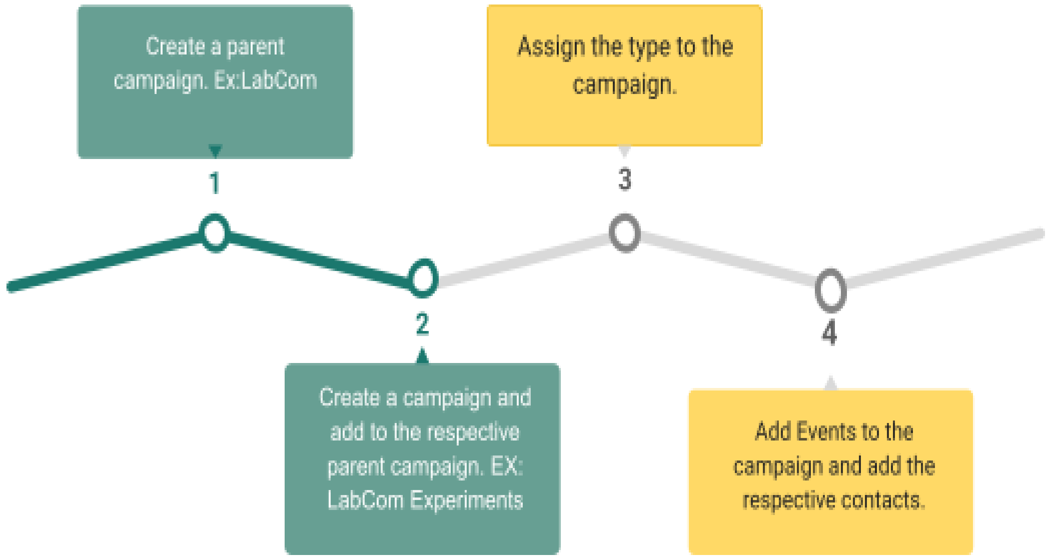
**3.** Match the unrecognized fields to the custom made fields.

**4.** Fix duplications

For more detailed instructions, watch the video below:
https://drive.google.com/file/d/1TUrpbcJxmA8KWlAuBdjgqjyBp3NGjWrL/view?usp=sharing

### 6. Creating events based on contact types

In order to avoid duplication of contact information we can assign types to child campaigns and relate the child campaigns to parent campaigns as shown in the steps below. When adding contacts to these events they can be part of multiple events with different roles, without the contact information being duplicated.




For more detailed instructions, watch the video below:

https://drive.google.com/file/d/1eu84yvBOfRh5Lsq3xDiDe9hgs-USfVCj/view?usp=sharing

### 7. Video on Creating Reports

To assist the organization with creating reports, we created videos on how to filter out specific information and create reports that can be visualized and exported as Excel files. In these videos we showed two examples:

a. Comparing number of male versus female participants

b. Displaying the roles each contact has had over time.

https://drive.google.com/file/d/1qxvXCEZ3HE4GLCN2x8vgmqh6s5YxEn57/view?usp=sharing

8. **Video on Customizing Duplication Rules**

A very essential outcome of using Salesforce is to avoid duplications for Caras con Causa and these duplications can happen in different ways. Therefore we explored different ways to change rules to detect duplications of contact information.

In this video we looked at detection of duplication by matching fullname. However, matching any field in Salesforce can be used to detect duplication.

https://drive.google.com/file/d/1vnKtVNYuSXzsH5ZjIEQhgSLd4gu1JyJy/view?usp=sharing

9. **Video on Sending and Tracking Emails**

The organization can choose to send emails to their contacts, individually or in groups, using Salesforce and find out when those emails were opened. This also allows them to track when and to whom they have sent emails. This process is shown in the video below.

https://drive.google.com/file/d/1C1n2irjwlq-SlM6bT0ju1NwGd-Hga1iv/view?usp=sharing

10. **Transferring Data from a Google Form to Salesforce Using Automate.io**

Guide:
https://docs.google.com/document/d/1w7swa3EosROYuY9-pBaGZS52wFExIaZGyCu_zKLEcV8/edit?usp=sharing

Video:

https://drive.google.com/file/d/1B9TXQo7xKos0iuLspL76yyVC9-vm0Tp8/view?usp=sharing

The organization can use a Google Form to collect data on their contacts and create a contact in Salesforce with this data. Using Automate.io will bypass the need to manually input a lot of data, and can automatically add contacts to Salesforce when someone submits a form.

11. **Setting up Squarespace Events and Transferring Them to Salesforce with Automate.io**

Video:
https://drive.google.com/file/d/1hO7U-WCedmAerE_mrjX5LIlCXa65hr8T/view?usp=sharing

This will allow the organization to let people sign up for events from Caras con Causa's website and add the event and attendee information to Salesforce. This will allow the organization to utilize Salesforce's functionalities.

## 12. **Additional Resources**

### Salesforce

Technical Support

1. Customer Service Phone Number: 1 (800) 667-6389
2. Request a call: https://www.salesforce.com/company/contact-us/

Learning and Implementation Resources

1. Salesforce Help Page
    a. https://help.salesforce.com/home
2. Interactive learning on Trailhead: guides you through different tasks of your choosing
    a. https://trailhead.salesforce.com/trails
3. How to contact experts including for implementation assistance
    a. https://www.salesforce.com/services/professional-services/overview/

Troubleshooting Resources

1. The Trailblazer community: allows your to ask questions from Salesforce experts and users or browse other people's technical issues and how they solved it
    a. https://trailblazers.salesforce.com/

### Automate.io

Technical Support

1. Email help@automate.io
2. If Caras con Causa plans to purchase the Growth subscription:
    a. Live chat bubble is available at bottom right in the App

Learning and Implementation Resources

1. Link to Automate.io Help Center
2. Information that could be helpful:
    a. FAQ
        i. How to create a bot?
            1. https://docs.automate.io/en/articles/597774-how-to-create-a-bot
        ii. Why are my bots not running?
            1. https://docs.automate.io/en/articles/642841-why-are-my-bots-not-running
        iii. How to test your bot?
            1. https://docs.automate.io/en/articles/3153752-how-to-test-your-bot

    iv. How often do bots run?
        1. https://docs.automate.io/en/articles/1035242-how-often-do-bots-run
    v. Date & time formatting
        1. https://docs.automate.io/en/articles/3684769-date-time-formatting
b. Getting Started
    i. Automate.io
        1. https://docs.automate.io/en/articles/597789-getting-started-with-automate-io
    ii. Squarespace integration
        1. https://docs.automate.io/en/articles/4723744-squarespace
    iii. Salesforce integration
        1. https://docs.automate.io/en/articles/1003887-salesforce
    iv. Quickbooks integration
        1. https://docs.automate.io/en/articles/962997-quickbooks
    v. Google Forms integration
        1. https://docs.automate.io/en/articles/4411847-google-forms
    vi. Google Sheets integration
        1. https://docs.automate.io/en/articles/597773-google-sheets

Troubleshooting Resources

1. Automate.io Help Center
    a. https://docs.automate.io/en/