

# Introduction to Contact Management in Salesforce

## Contents

What is Salesforce? .....	1
What is Contact Management? .....	2
What's the point? .....	2
Contact Management key concepts .....	2
Contacts and Engagements.....	2
Reports and Dashboards.....	3
Other types of records .....	4
How to.....	4
View an overview of interactions with a contact .....	4
Option 1 – via the Engagements tab.....	5
Option 2 – via the search bar and Contact record .....	5
The Engagement record page .....	7
Create a new Contact and Primary Engagement.....	8
Tip! .....	10
Log an Activity with a contact.....	11
Notes!.....	12
Add Sub-Engagements to a primary Engagement record.....	12
Associate keywords with a contact.....	13
Option 1 – Associate multiple keywords to a single contact .....	14
Option 2 – Associate multiple contacts to a single keyword .....	15
Tip! .....	16
Understand Event History and Applications .....	16
View a report or dashboard.....	17

## What is Salesforce?

Salesforce is a cloud computing constituent relationship management (CRM) platform. If you've not used a CRM system before or you're not sure what they do then you may wish to complete the Trailhead '[Salesforce User Basics](#)' module, which provides some background information. (Trailhead is Salesforce's training website, which you can access with your Salesforce login.)

Salesforce was originally a platform primarily for sales-focussed organisations, and much of its branding, terminology and training materials are designed accordingly. However, many of the technologies that Salesforce offers also have the power to improve student interactions and management of student data, so LSE is pioneering its use in the UK Higher Education sector.

Salesforce works on the concept of ‘apps’. Each app is used to perform a specific function, just like on a smartphone. Whereas on your phone you might have apps for email, maps, web browsing, etc, in LSE’s Salesforce environment there are apps for event management, marketing communications, student admissions, and many more. Some of these apps are built by Salesforce, some by third party suppliers and some have been built or customised by LSE’s ARD Systems team.

## What is Contact Management?

Contact Management is an app that enables users to record key information about people that interact with a particular department or office at the School, and store details of specific interactions. These interactions could include, for example, event attendance, applications submitted or memberships of boards or steering groups. You can also use the Contact Management app to log emails, calls and meetings.

### What’s the point?

By storing all information about an individual in one place teams have a ‘single source of truth’ showing accurate, up-to-date information to all members of a team. This reduces human error and duplication of work, and the additional data collected can be used for measuring KPIs, sending targeted marketing campaigns, analysing business needs, etc.

Putting data into Salesforce also creates wider benefits for people who interact with multiple departments at LSE and makes it much easier for the School to meet its obligations under the General Data Protection Regulation (GDPR).

The screenshot shows the Salesforce interface for the Contact Management app. The top navigation bar includes 'Contact Management', 'Contacts', 'Engagements', 'Preference Areas', 'Organization Events', 'Applications', 'Reports', and 'Dashboards'. The main content area is divided into several sections:

- Contact Details:** Displays personal information for Blessol Gathoni, including Name, Email (blessol@therules.org), Phone, Job Title (Advisor for Community and Culture), Country of Domicile (Kenya), and Mobile.
- Engagement Details:** Shows related engagement information, such as Engagement Number, Contact, Engagement Type (Primary Engagement Record), Contact Type (Atlantic Community:Atlantic Programme:Fellow:Policy), and Description.
- Sub-Engagements (3):** A table listing sub-engagements with columns for Engagement Number, Contact, Engagement Type, and Created By.
 

Engagement Number	Contact	Engagement Type	Created By
12	Blessol Gathoni	Mentoring	Daniel Newby
00001	Blessol Gathoni	Research Project	Daniel Newby
00002	Blessol Gathoni	Lifelong Fellow	Daniel Newby
- Next Steps:** A section for upcoming tasks and events, such as 'Annual Conference' on 09:00 | 04-Mar-2019.
- Past Activities:** A list of historical interactions, including calls, emails, and tests, with dates and descriptions.
- Event History for Parent Contact (2):** A section for event history, currently empty.

1 The Contact Management app

## Contact Management key concepts

### Contacts and Engagements

For contact management most information about individuals is stored on one of two records: Contact records or Engagement records.

**Contact records** contain basic personal details about an individual such as their name, email address, country of domicile etc. In LSE’s Salesforce environment each individual should only have one Contact record even if they interact with multiple offices at the School, so there is likely to be information on Contact records that is not relevant to your team. You will not be able to see all the data stored on an individual’s Contact record.

Details		Related	
Title	Mr	Email	d.newby@lse.ac.uk
Name	Daniel Newby	Alt Email	
Job Title	Salesforce Administrator / Developer	Alt Email 2	
Account Name	<a href="#">Newby Account</a>	Phone	
Latest Institution Employment		Mobile	
Latest Other Employment		Access Stamp	-ARDS;MEC;SMR;III;
Organisation		emailGroups	Essential;MEC
Organisation 2		Email Preferences Updated	
Department	ARD Systems	emailGroup_Populator	
Discipline		Contact Owner	Daniel Newby
Categories		Description	
Country of Interest		Notes	
Country of Domicile	<a href="#">Kiribati</a>		

### 2 A Contact record

**Engagements records**, by contrast, contain information specific to a particular team at the School, such as what type of contact they are (e.g. student, staff, media contact) and how they have interacted with that team. Teams will usually only be able to see Engagements related to their team.

Related	Engagement Details	
<div style="background-color: #f2f2f2; padding: 5px;">           Engagement Information         </div>		
Engagement Number	Blessol Gathoni	Owner  Verity Treadwell
Contact	<a href="#">Blessol Gathoni</a>	Primary Organisation <a href="#">The Rules</a>
Engagement Type	Primary Engagement Record	Secondary Organisation <a href="#">Atlantic Fellows for Health Equity</a> , <a href="#">George Washington University</a>
Contact Type	Atlantic Community;Atlantic Programme;Fellow;Policy	
Description		
<div style="background-color: #f2f2f2; padding: 5px;">           &gt; System Information         </div>		

### 3 An Engagement record

## Reports and Dashboards

One of the key strengths of Salesforce is the ease with which it is possible to create and view reports on the data that your team uses. These can be used for at-a-glance reports, measuring KPIs, sending targeted email campaigns and much more. **Reports** look at individual statistics while **dashboards** group together data from multiple reports into a single view.



4 A dashboard showing data from several reports

## Other types of records

While some interactions are stored directly as Engagement records others, such as event attendance, applications submitted and keywords, have their own specific types of records. Although not part of the Engagement record, they appear on the same page when viewing an Engagement.

The screenshot shows the engagement record page for Blesool Gathoni. It includes several sections:

- Contact Details:** Name: Blesool Gathoni, Job Title: Advisor for Community and Culture, Country of Domicile: Kenya, Mobile: [redacted].
- Engagement Information:** Engagement Number: Blesool Gathoni, Owner: Verity Treadwell, Contact: Blesool Gathoni, Primary Organisation: The Rules, Primary Engagement Record: Blesool Gathoni, Secondary Organisation: Atlantic Fellows for Health Equity, George Washington University, Contact Type: Atlantic Community, Atlantic Programme, Fellow, Policy, Description: [redacted].
- Sub-Engagements (3):** A table listing sub-engagements with columns for Engagement Number, Contact, Engagement Type, and Created By.
- Preferences for Parent Contact (4):** A table listing preferences with columns for Preference Name, Preference Area Name, and Type.
- Next Steps:** A list of tasks and events, including 'Annual Conference' and 'Call Blesool'.
- Past Activities:** A list of activities, including 'Call Blesool', 'Task: Blesool Gathoni sent an email to D.Newby@lse.ac.uk', and 'Task: RE: SMR Service Desk forms'.
- Event History for Parent Contact (2):** A table listing events, including 'Fellows Retreat 2019' and 'III Text Event - Schmoose Evening'.
- Applications for Parent Contact (0):** A section for applications.
- Notes (0):** A section for notes.

5 Engagement record page showing related Sub-Engagements, Preferences (keywords), Activities, Event History, Applications and Notes

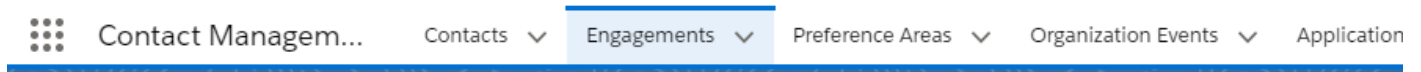
## How to...

View an overview of interactions with a contact

The best place to see all information about an individual is on their primary Engagement record page. There are two ways to get there:

## Option 1 – via the Engagements tab

1. Click on the Engagements tab.



2. A list of 'Recently Viewed' Engagement will appear, but you will only be able to see the records numbers. Click on 'Recently Viewed' and select a different list view to see relevant Engagements.

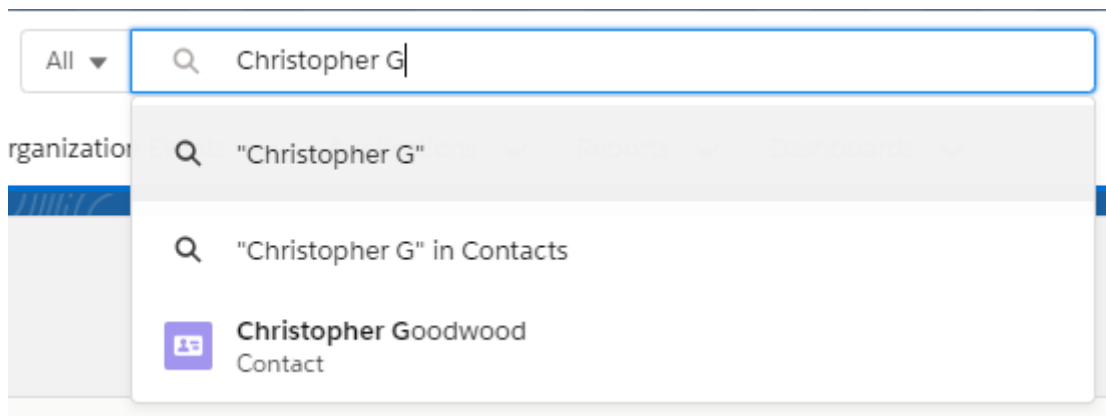
	ENGAGEMENT NUMBER	CONTACT	CONTACT TYPE	PRIMARY ORGANISATION	OWNER
1	00003	Ed Buris	LSE Staff: Professional Services	London School of Economics and Political Science	DNewb
2	00004	Andrew Kaufman	LSE Staff: Professional Services;Supplier	London School of Economics and Political Science	DNewb
3	00005	Christopher Goodwood	Supplier	STUDYWORLD	DNewb

3. Find the individual contact you are looking for - you can sort the list alphanumerically by clicking on any of the column headings, e.g. contact name. Once found, click on the Engagement Number to open the Engagement record page.

	ENGAGEMENT NUMBER	CONTACT
1	00004	Andrew Kaufman
2	00005	Christopher Goodwood
3	00003	Ed Buris

## Option 2 – via the search bar and Contact record

1. Type the name of the person you are trying to find into the global search bar at the top of the page. As you type, the person's name will often appear below the search bar. If it does, click on it. If not, finish their name, press 'Enter' on your keyboard and find the contact in the search results.



2. The individual's Contact record will load. Note you can see personal details such as name, email address, job title etc, but you will not see any information specific to your team.

Contact  
**Mr Christopher Goodwood**

Title Account Name Phone (2) Email Contact Owner  
 Goodwood Account cg@example.com Daniel Newby

**Details** Related

Title			Email	cg@example.com
Name	Mr Christopher Goodwood		Alt Email	
Job Title	Journalist		Alt Email 2	
Account Name	Goodwood Account		Phone	
Latest Institution Employment			Mobile	
Latest Other Employment			Access Stamp	:ARDS;III;
Organisation			emailGroups	Essential
Organisation 2			Email Preferences Updated	
Department			emailGroup_Populator	
Discipline			Contact Owner	Daniel Newby
Categories			Description	
Country of Interest			Notes	
Country of Domicile	Germany			

- Click on the 'Related' tab, scroll down to 'Engagements' and then click on the Engagement Number to open the Engagement record page.

Contact  
**Mr Christopher Goodwood**

Title Account Name Phone (2) Email Contact Owner  
 Goodwood Account cg@example.com Daniel N

**Details** **Related**

- Affiliated Accounts (0)
- Preferences (0)
- Notes (0)
- Inquiries (0)
- Event History (0)
- Engagements (1)**

ENGAGEMENT NUMBER	ENGAGEMENT TYPE
00005	Primary Engagement Record

- Applications (0)

## The Engagement record page

Once you've opened an Engagement record page you'll see that there's quite a lot going on. There are various boxes with different types of information. See below for details.

The screenshot displays the Engagement record page for Christopher Goodwood. The page is divided into several sections, each highlighted with a red number:

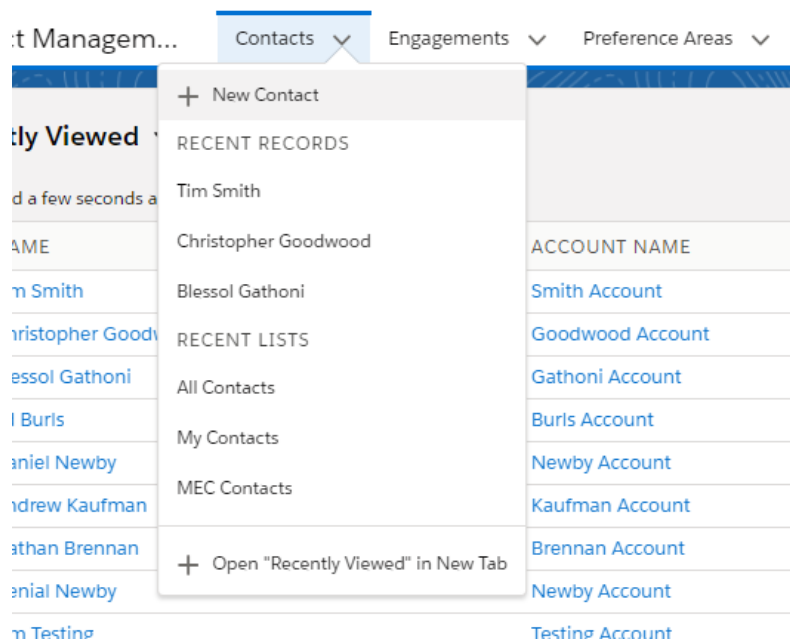
- 1** Contact Details: A form containing personal and professional information such as Name, Email, Phone, Job Title, Country of Domicile, and Mobile.
- 2** Engagement Details: A section for related engagement information, including Engagement Number, Contact, Engagement Type, Contact Type, and Description.
- 3** Sub-Engagements (3): A table listing sub-engagements with columns for Engagement Number, Engagement Type, Contact, and Description.
- 4** Preferences for Parent Contact (6+): A table listing preferences with columns for Preference ID, Preference Name, Preference Area Name, and Type.
- 5** Task Management: A section for creating and managing tasks, including a 'Create a task...' input field and a list of tasks.
- 6** Event History for Parent Contact (2): A table listing events with columns for Event Name, Venue, Start Date-Time, and Attended status.
- 7** Applications for Parent Contact (0): A section for managing applications, currently showing zero.
- 8** Notes (1): A section for managing notes, currently showing one note.

- 1. Contact Details.** Some basic contact details, taken from the individual's Contact record. Think carefully before editing these details as this information could be used by other teams.
- 2. Engagement Details.** This is the actual Engagement record. Note the Engagement Type – this should usually be 'Primary Engagement Record'. Any additional Engagements this contact has will be listed under 'Sub-Engagements'. Engagements are always associated with an individual Contact record and can be associated with up to two organisations. Engagements also have an 'Owner'. If your team has contacts that 'belong' to individual team members then that team member is the owner. By default, the person who creates the Engagement record will be the owner, but this can be changed after creation.
- 3. Sub-Engagements.** Here are recorded interactions with a contact that don't fit into any of the other categories.
- 4. Preferences.** In the context of Engagements, Preferences are 'keywords' that you might use to associate contacts to a particular theme or area of interest. If the contact has agreed to be on your mailing list you can use preferences to send targeted emails based on contacts' areas of interest.
- 5. Activity History.** The Activity History feed can be used to log upcoming or past calls, emails, meetings or tasks associated with a contact who has an engagement with your team. If you use the Lightning for Outlook add-in then meetings and emails you log will appear here. Click on the 'Email' tab to send an email that will be logged against the Engagement record.
- 6. Event History.** If your team manages events using Salesforce then any events the contact has registered to attend will appear here.
- 7. Applications.** If your team receives applications using Salesforce then any applications the contact has started will appear here.
- 8. Notes.** Notes stored against an Engagement record can only be seen by your team.

## Create a new Contact and Primary Engagement

To add a new contact to the Salesforce database:

1. Click on the dropdown button on the 'Contacts' tab and then click 'New Contact'.



2. If you are asked to select a record type, choose the most appropriate type (usually 'Non-HE contact') and then click 'Next'.



### New Contact

Select a record type

- Student  
012580000004heU
- Non-HE contact  
012580000000mtc
- Parent  
012580000004heZ
- Staff  
012580000004r3v
- Student&Staff  
012580000004r40
- Teacher/Counsellor  
012580000004hee

- On the following page enter the name and email address of your contact. Make sure you enter these correctly as this information is used to check whether the contact already exists in LSE's Salesforce database. Click 'Save'.

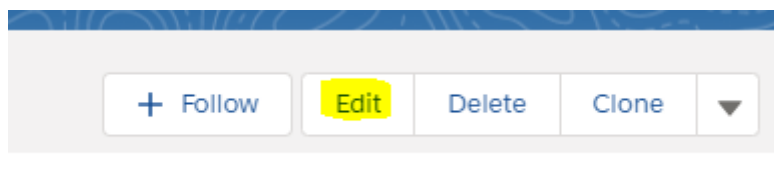
### New Contact

**First Name**  
**\*Last Name**  
**\*Email**

Tim
AA-Testing
t.aa@example.com

This page checks for duplicates that already exist in the system and matches them if they exist. If this happens, the f

- When you click 'Save' a check will run to see if the contact already exists in the database. If it does, you will be granted access to the individual's Contact record. If not, a new Contact record will be created. In either case, once the Contact record has loaded, click 'Edit' to add any additional details about the contact, such as job title, phone number, date of birth, etc, and then click 'Save'.



- Next you need to add the Engagement record for the new contact. Click on the 'Related' tab then click 'New' next to Engagements.

Details **Related**

- + Affiliated Accounts (0) New
- + Preferences (0) New
- + Notes (0) New
- + Inquiries (0) New
- + Event History (0) New
- + Engagements (0) New

6. A box titled 'New Engagement' will open. Note that the Contact will be your newly created contact, and the Engagement Type should be 'Primary Engagement Record'. For Contact Type, add as many options as necessary by using the arrows. You can associate the Engagement with up to two organisations. Start typing the name of an organisation to search for it, and click on it once it appears. If it's a new organisation you may need to click 'New Account' to add it to the database first. When you have finished, click 'Save'.

New Engagement: III

Engagement Information

Engagement Number

Owner Daniel Newby

\* Contact Tim AA-Testing

Primary Organisation The Rules

Engagement Type Primary Engagement Record

Secondary Organisation UCL

Contact Type

Available

- Academic Advisor
- Atlantic Fellow: Non-Residential
- Atlantic Programme
- Donor
- Events
- External Academic
- Fellow

Chosen

- Atlantic Fellow: Residential
- III Student/Alumni
- Atlantic Community

Description

Sports a bushy white beard and often seen wearing a red suit with white fur trim and matching hat.

System Information

Record Type III

Cancel Save & New Save

7. Click on the Engagement Number to view your newly created Engagement record.

Engagements (1)
ENGAGEMENT NUMBER
00009

### Tip!

If you know that a Contact record already exists for someone and you just want to add a primary Engagement record, you can skip straight to that step by clicking the dropdown button on the 'Engagements' tab and then clicking 'New Engagement'. You'll need to make sure you associate your new Engagement with the right Contact by typing their name in the 'Search Contacts' box and then selecting their Contact record when it appears.

Engagement Information

Engagement Number

\* Contact

Engagement Type

Contact Type

Tim AA

"Tim AA" in Contacts

Tim AA-Testing  
The Rules

+ New Contact

## Log an Activity with a contact

1. Follow the instructions above on how to view an overview of interactions with a contact to open the primary Engagement record page for the person you wish to log an activity for. The Activity History box is at the top right of the Engagement record page.

Engagement  
Christopher Goodwood

New Contact Edit New Case

Contact Details

Name: Mr Christopher Goodwood  
Email: cg@example.com  
Phone: 01234567890

Job Title: Journalist  
Country of Domicile: Germany  
Mobile: 07123456789

Related Engagement Details

Engagement Information

Engagement Number: 00005  
Contact: Christopher Goodwood  
Engagement Type: Primary Engagement Record  
Contact Type: Supplier  
Description: Supplier of widgets to the AFSEE programme.

Owner: Verity Treadwell  
Primary Organisation: STUDYWORLD  
Secondary Organisation: Atlantic Fellows for Health Equity, George Washington University

Sub-Engagements (3)

Engagement Number	Engagement Type	Contact	Description
00006	Fellows Days/Retreat	Christopher Goodwood	

Activity History for Parent Contact (2)

Event Name	Venue	Start Date-Time	Attended
Fellows Retreat 2019	Muness Castle, Shetland	17/01/2019 09:00	<input type="checkbox"/>
III Test Event - Schmooze Ev...	The Box, 5th Floor, Petnick-Law...	14/12/2018 18:00	<input checked="" type="checkbox"/>

2. To log an Activity, click on the relevant tab, add any details you need and click 'Save'.

New Task New Event Log a Call Email

\*Subject  
Call to discuss keynote speech

Comments  
Christopher had some great ideas.

Name  
Christopher Goodwood

Related To  
00005

Save

3. Any Activities you log will appear in the feed.

Next Steps

More Steps

Test task  
Verity Treadwell has an upcoming Task with Christopher Goodwood  
20-Dec

Past Activities

[No subject]  
You sent an email to Christopher Goodwood  
Last opened 2 hours ago  
11:20 | Today

Call to discuss keynote speech  
You logged a call with Christopher Goodwood  
Today

Call  
You logged a call with Christopher Goodwood  
Today

Load More Past Activities

Notes!

- You can use the 'Email' tab to send emails that will be logged against the Engagement record. If you have set up Salesforce to send emails through Outlook 365 then these emails will appear in your sent items.
- If you use the Lightning for Outlook add-in to log emails and meetings in Salesforce, then they will appear in the Activities feed.
- The 'New Event' option is for meetings, e.g. those arranged in Outlook, rather than managed events such as conferences or public lectures.

Add Sub-Engagements to a primary Engagement record

If you want to log an interaction with a contact that doesn't fall into any other category you can use Sub-Engagements. To add a new one:

1. Follow the instructions above to open the primary Engagement record for a Contact, then scroll down to 'Sub-Engagements' and click 'New'.

The screenshot shows a Salesforce record for an engagement with Christopher Goodwood. The record is titled 'Engagement Christopher Goodwood'. It is divided into several sections:

- Contact Details:** A table with fields for Name (Mr Christopher Goodwood), Job Title (Journalist), Email (cg@example.com), Country of Domicile (Germany), Phone (01234567890), and Mobile (07123456789).
- Engagement Details:** A table with fields for Engagement Number (00005), Contact (Christopher Goodwood), Engagement Type (Primary Engagement Record), Contact Type (Supplier), Description (Supplier of widgets to the AFSEE programme), Owner (Verity Treadwell), Primary Organisation (STUDYWORLD), and Secondary Organisation (Atlantic Fellows for Health Equity, George Washington University).
- Sub-Engagements (3):** A section with a 'New' button and a table with columns for Engagement Number, Engagement Type, Contact, and Description.

2. The New Engagement screen will appear. Add the Contact and Engagement Type but leave all the other fields blank.

### New Engagement: III

Engagement Information

Engagement Number: \_\_\_\_\_ Owner: Daniel Newby

\* Contact: Christopher Goodwood ×

Engagement Type: Mentoring ▼

Contact Type:

Available

- Academic Advisor
- Atlantic Community
- Atlantic Fellow: Non-Residential
- Atlantic Fellow: Residential
- Atlantic Programme
- Donor
- Events

Chosen

Primary Organisation:  🔍

Secondary Organisation:  🔍

Description:

System Information

Record Type: III

3. Click 'Save' and note that your newly-created Sub-Engagement now appears on the list of Sub-Engagements.

**Sub-Engagements (4)**

ENGAGEMENT NUMBER	ENGAGEMENT TYPE	CONTACT	DESCRIPTION
<a href="#">00006</a>	Fellows Days/Retreat	<a href="#">Christopher Goodwood</a>	▼
<a href="#">00007</a>	III Fellows	<a href="#">Christopher Goodwood</a>	▼
<a href="#">00008</a>	Network Innovation Teams	<a href="#">Christopher Goodwood</a>	▼
<a href="#">00010</a>	Mentoring	<a href="#">Christopher Goodwood</a>	▼

[View All](#)

### Associate keywords with a contact

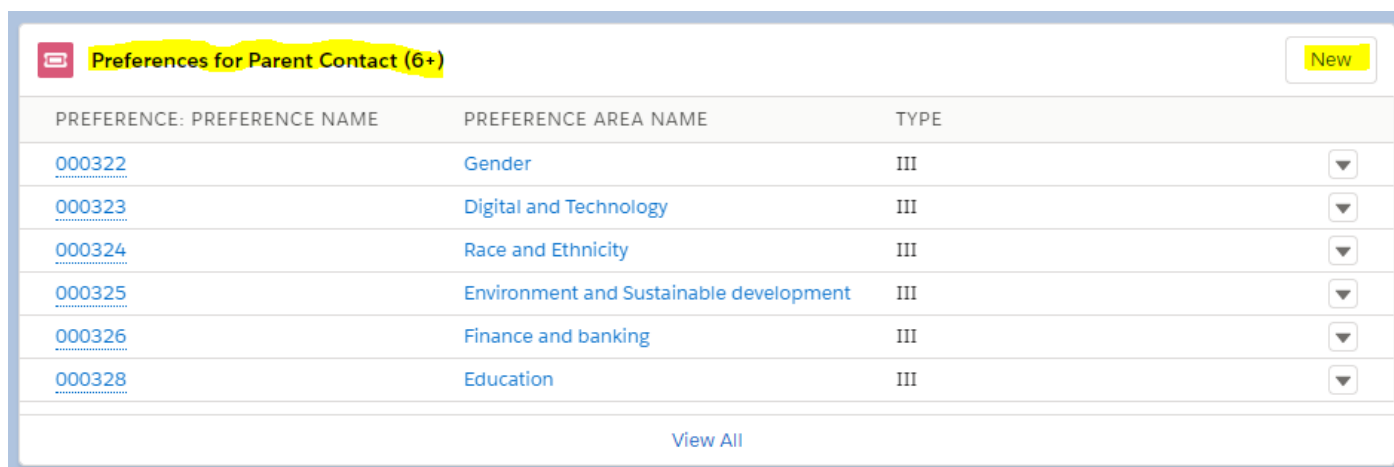
In LSE's Salesforce environment keywords are stored as 'Preference Areas' which you can use to separate your contacts into groups. You could use this function, for example, to send contacts targeted information based on their keyword interests.

If you want to associate a contact with a keyword you need to create a 'Preference' record that links the individual's Contact record to the relevant Preference Area record. There are two ways to do this – one is quicker if you want to

link multiple keywords to one contact, and the other is quicker if you want to link multiple contacts to a single keyword.

### Option 1 – Associate multiple keywords to a single contact

1. Follow the instructions above to open the primary Engagement record for a Contact, then scroll down to 'Preferences for Parent Contact' and click 'New'.

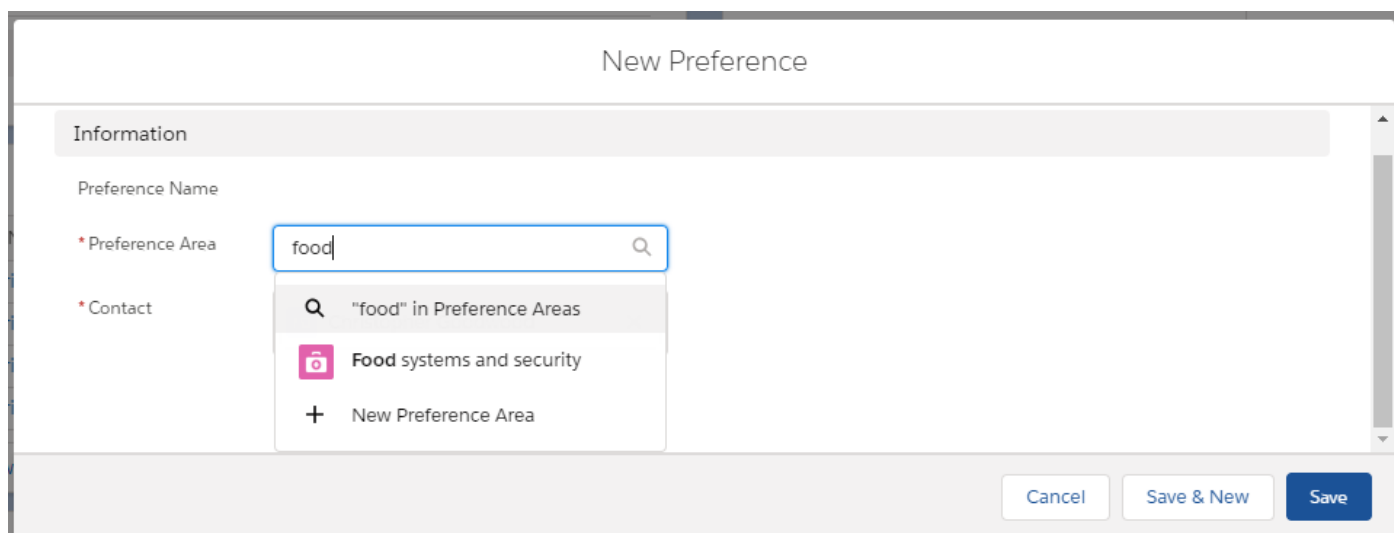


The screenshot shows a user interface titled "Preferences for Parent Contact (6+)". In the top right corner, there is a yellow "New" button. Below the title is a table with the following columns: "PREFERENCE: PREFERENCE NAME", "PREFERENCE AREA NAME", and "TYPE". The table contains six rows of data, each with a preference ID, a preference area name, and a type of "III". A "View All" link is located at the bottom center of the table.

PREFERENCE: PREFERENCE NAME	PREFERENCE AREA NAME	TYPE
<a href="#">000322</a>	Gender	III
<a href="#">000323</a>	Digital and Technology	III
<a href="#">000324</a>	Race and Ethnicity	III
<a href="#">000325</a>	Environment and Sustainable development	III
<a href="#">000326</a>	Finance and banking	III
<a href="#">000328</a>	Education	III

[View All](#)

2. When the 'New Preference' screen appears, start typing the name of the keyword you want to associate to the contact in the 'Preference Area' field. When the keyword appears, click on it.



The screenshot shows the "New Preference" form. The "Information" section is expanded. The "Preference Name" field is empty. The "Preference Area" field contains the text "food" and has a search dropdown menu open. The dropdown menu lists three options: "food" in Preference Areas, "Food systems and security" (with a pink icon), and "New Preference Area" (with a plus sign). At the bottom right of the form, there are three buttons: "Cancel", "Save & New", and "Save".

3. Note that the 'Contact' field will already be populated with the name of the contact you are associating with the keyword. Click 'Save' to return to the Engagement record page, or 'Save and New' to add another keyword.

### New Preference

Information

Preference Name

\* Preference Area 
 Food systems and security ×

\* Contact 
 Christopher Goodwood ×

Cancel
Save & New
Save

- Once you have finished you will be returned to the Engagement record page. Keywords you have added will now be listed under 'Preferences for Parent Contact'. If there are more than 6 then you will need to click on 'View All' to see them all.

Preferences for Parent Contact (6+)
New

PREFERENCE: PREFERENCE NAME	PREFERENCE AREA NAME	TYPE	
<a href="#">000322</a>	Gender	III	▼
<a href="#">000323</a>	Digital and Technology	III	▼
<a href="#">000324</a>	Race and Ethnicity	III	▼
<a href="#">000325</a>	Environment and Sustainable development	III	▼
<a href="#">000326</a>	Finance and banking	III	▼
<a href="#">000328</a>	Education	III	▼

[View All](#)

Option 2 – Associate multiple contacts to a single keyword

- Click on the 'Preference Areas' tab and then change the list view from 'Recently Viewed' to 'All' or another relevant list view.

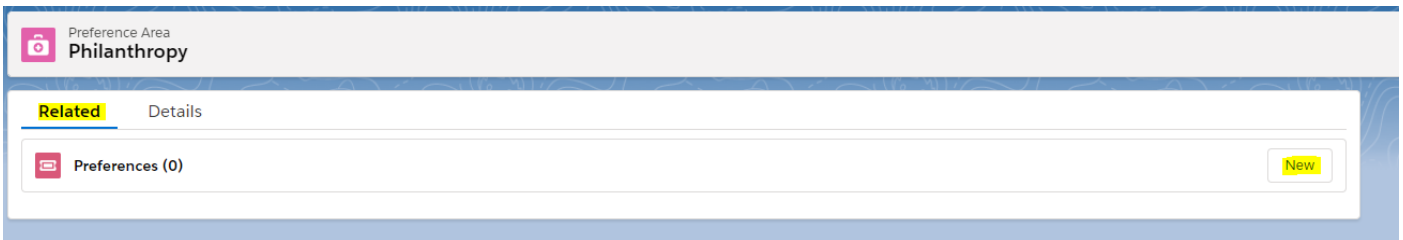
☰
Contact Managem...
Contacts ▼
Engagements ▼
Preference Areas ▼
⋮

📷
Preference Areas
III Preference Areas ▼

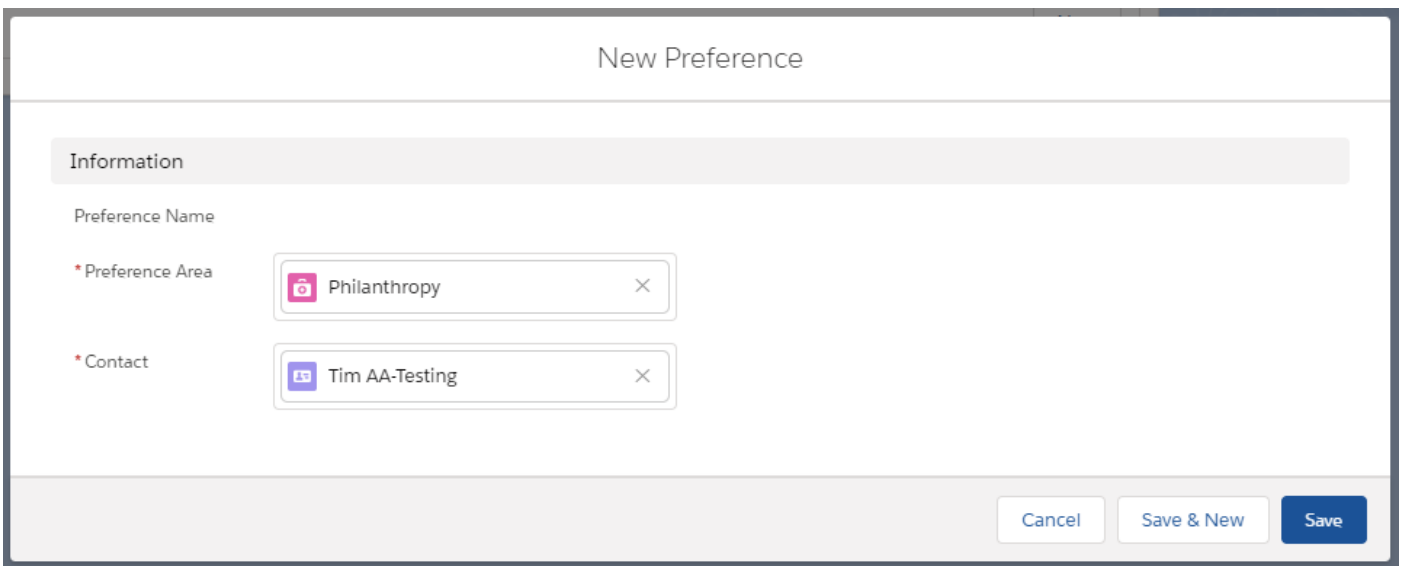
32 items

	LIST VIEWS
	All
1	✓ III Preference Areas
2	MEC Preference Areas
3	Recently Viewed
4	<input type="checkbox"/> Communications

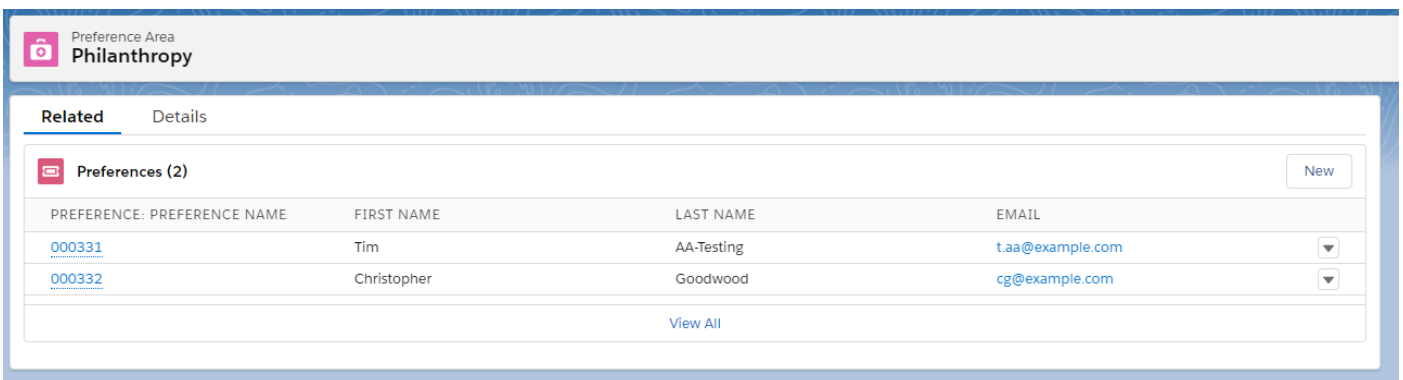
2. Scroll down the list of Preference Area keywords to find the one you want and click on it, or use the 'Search this list' box towards the top right of the screen.
3. Once you have opened your Preference Area, click on the 'Related' tab and then click 'New' next to 'Preferences'.



4. When the 'New Preference' screen opens, note that the 'Preference Area' field is already populated. In the 'Search Contacts' field start typing the name of the contact you wish to add. When their name appears, click on it to select, then click 'Save & New' to add another contact, or 'Save' to finish.



5. When you have finished you'll return to the Preference Area 'Related' list, which now show all the Preferences you have added.



**Tip!**  
If you have a mailing list sign-up form you can ask contacts what keywords they are interested in when they sign up. These keywords can then automatically be associated with the Contact so that you don't have to add them manually.

### Understand Event History and Applications

If your team manages events or programme applications with Salesforce then you may see data in the 'Event History for Parent Contact' and/or 'Applications for Parent Contact' boxes on the Engagement record page. This data is



created automatically when contacts sign up to attend an event or start an application. You should not update this data yourself unless you are involved in managing events or processing applications and know what you're doing.

## View a report or dashboard

To view a report or dashboard:

1. Click on the 'Reports' or 'Dashboards' tab as appropriate.
2. If the report or dashboard you want is on your 'Recent' list, click on it to view it.
3. If the report or dashboard you want is *not* on your 'recently viewed' list, click 'All Folders', select the folder that contains the dashboard you want and then click on it to open.

The screenshot shows the Salesforce Contact Manager interface. The top navigation bar includes 'Contact Managem...', 'Contacts', 'Engagements', 'Preference Areas', 'Organization Events', and 'Applications'. The 'Reports' and 'Dashboards' tabs are highlighted with a red box and labeled '1'. Below this, the 'Reports' section is displayed, showing a 'Recent' list of 6 items. The first item, 'All Primary Engageme...', is highlighted with a red box and labeled '2'. The left sidebar shows 'FOLDERS' with 'All Folders' selected, indicated by a red box and arrow labeled '3'. The table below shows the following data:

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	CREATED BY	CREATED ON	SUBSCRIBED
Recent	All Primary Engageme...		III Contact Manageme...	Daniel Newby	14/12/2018, 12:02	
Created by Me	III 'Campaigning' Cont...	III contacts with keyw...	III Contact Manageme...	Daniel Newby	24/10/2018, 15:38	
Private Reports	Accepted Place on Pro...		WP Project Manageme...	Dimple Bhimji	12/06/2017, 15:57	
Public Reports	All Engagements		III Contact Manageme...	Daniel Newby	22/11/2018, 14:22	
	Contacts with keywords		III Contact Manageme...	Daniel Newby	22/11/2018, 15:00	
All Reports	All III Affiliations		III Contact Manageme...	Daniel Newby	24/10/2018, 15:20	