

FIGMENT WEEKEND CURATORIAL

SALESFORCE HANDBOOK

VERSION 2.0—UPDATED FOR 2014 (FEB 26, 2014)

VERSION 1.3 — ADDED POWER REQUIREMENTS DETAILS (APR 30, 2013)

VERSION 1.2 — REVISED AFTER MAR 7 MEETING (MAR 10, 2013)

VERSION 1.1— INITIAL EDITION RELEASED TO TEAM (MAR 6, 2013)

CONTENTS

1. Project review Workflow
2. Running Salesforce Reports
3. Project View Setup
4. Setting up a Template
5. Using a Template
- A. Suggested Email Templates

1. PROJECT REVIEW WORKFLOW

When a new project is successfully submitted, a Lead Curator will assign **ownership** to a member of the curatorial team. The new owner of the project will receive an email from Salesforce informing him or her of the assignment with the subject “FIGMENT Project transferred to you.” Included in the email is a link to view the project submission.



When you're ready to review the project in Salesforce, you can find it either by:

- clicking the link in the email
- finding it in your Project View (See appendix)
- searching for the project name in Salesforce using the search bar at the top



At the top of the project page, click the “Follow” button to begin following the project’s chatter. You’ll use Chatter to communicate questions and concerns about the project to the lead curators.

REDO



Send an introductory email to the primary and secondary contacts letting them know who you are, and that you'll be working with them. See the appendix for suggested language to use.

Just click the "Send an Email" button on the project page under "Activity History." You can now see at a glance communications you've sent to the artist.

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Email: Welcome!	Donald Rider	✓	3/3/2013	Don Rider	3/3/2013 1:58 PM

... for the usual do's and don't we look for in projects that are appropriate for FIGMENT. What questions do you have for the artist? What questions do you have for the lead curators?

For questions and clarifications for the artist, you can email the artist as discussed in step 3.

For questions for the lead curators, post your question on the Chatter feed.

[Customize](#)

Hide Feed Following

Post File Link Poll

They say they have a food service license. Can we allow them to serve cupcakes, then?

To this figment project

5) Edit the project submission as needed.

As you work with your artist, you may find that you want to update their submission with new information. To do so, just click the “Edit” button under the Chatter feed. The form will reload, showing the submission as a form you can edit. When you’re done, click “Save” button at the top of the page.

[FIGMENT Schedules \[4\]](#) | [Notes & Attachments \[2\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [FIGMENT Project History \[1\]](#) | [FIGMENT Artists](#)

FIGMENT Project Detail

Account	Irene Malatesta	Stage	Accepted
FIGMENT Event	FIGMENT NYC 2013	Owner	 Don Rider [Change]
Vaiver Acceptance Date	1/30/2013 7:59 AM	Record Type	FIGMENT Project Active [Change]
Policy Acceptance Date	1/30/2013 7:59 AM		

Note that the artist can review the changes you’ve made in the Artist Portal by going to the Submissions tab and clicking on the title of their project.

My Projects

Please review project submission before clicking SUBMIT. By clicking SUBMIT you will no longer be able to edit project submission.

Project Title	FIGMENT Event	Status	Date Created	Last Modified	Action
Danielle Kling Is Carried Around By a Group of Hot Men TEST	FIGMENT NYC 2013	Accepted	02/04/2013	03/06/2013	VIEW
TEST 5	FIGMENT NYC 2013	Submitted	03/03/2013	03/03/2013	VIEW
TEST NYC 2013	FIGMENT NYC 2013	Accepted	02/26/2013	02/26/2013	VIEW


Once you are satisfied that the project meets FIGMENT criteria and the project submission is complete and updated, post “Project ready to approve” to the Chatter feed. Or—if you feel a project should be declined, note why in Chatter.

A lead curator will give the submission a final review. If the lead has any questions or concerns, he or she will post them on Chatter for you to address. If the lead agrees that the project is ready to be accepted or declined, he or she will post “Please accept (decline) this project” to Chatter.

To accept a project, click the “Accept” button under the FIGMENT Project Detail section. Only the “owner” of a project submission can accept a given project. The same goes for a delined project.

[FIGMENT Schedules \[4\]](#) | [Notes & Attachments \[2\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [FIGMENT Project History \[1\]](#) | [FIGMENT Artis](#)

FIGMENT Project Detail Edit Delete Sharing Accept Decline

Account	Irene Malatesta	Stage	Accepted
FIGMENT Event	FIGMENT NYC 2013	Owner	 Don Rider [Change]
Vaiver Acceptance Date	1/30/2013 7:59 AM	Record Type	FIGMENT Project Active [Change]
Policy Acceptance Date	1/30/2013 7:59 AM		

When you accept or decline a project, a form letter is sent to the artist. See the appendix for the content of those emails.

Now that the artist is on board, you should email him or her, and confirm the information contained in the “Public Information for FIGMENT Website” section and the “Power needs” section of the form. See the appendix for suggested language.

On Power Requirements: Power needs to be specified in **Amps (A)** or **Watts (W)**. Watts is probably your best bet, as most electronic devices will note their wattage somewhere in their specifications, manual, or on the device or power adapter itself. Saying “120 Volts” (120v) is not sufficient. 120v simply means it uses standard North American household power. Amps or Watts tells us the total draw of power, and thus the size of the generator or strain on the fragile power grid on Governors Island.

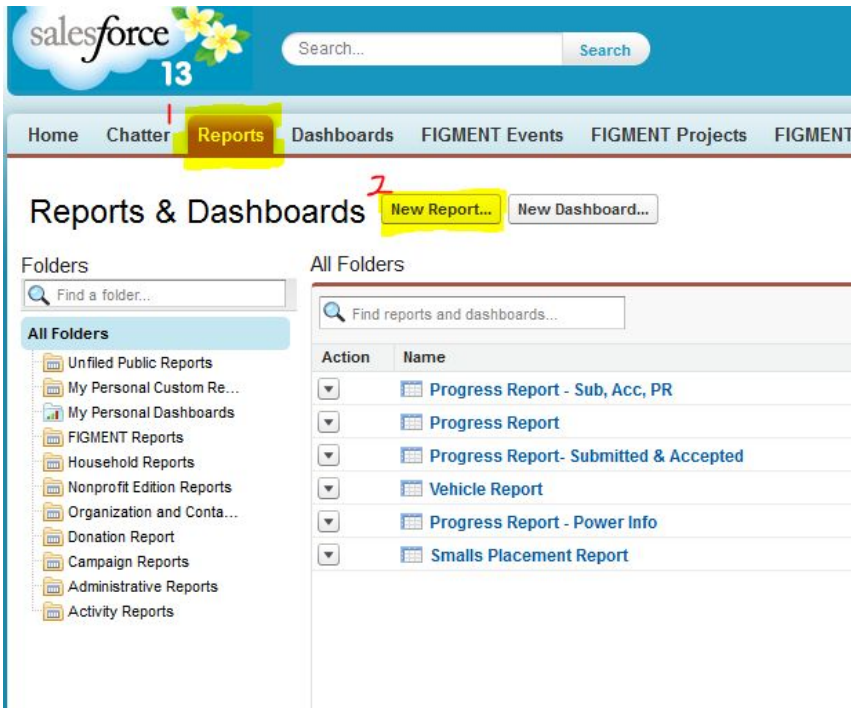
Once you’re confirmed critial details, edit the form and change the “Stage” of the form to “Production Ready”.

FIGMENT Project Detail Edit Delete Sharing Accept Decline

Account	Irene Malatesta	Stage	Production Ready
FIGMENT Event	FIGMENT NYC 2013	Owner	 Don Rider [Change]
Waiver Acceptance Date	1/30/2013 7:59 AM	Record Type	FIGMENT Project Active [Change]
Policy Acceptance Date	1/30/2013 7:59 AM		
Artist Participants			

2. RUNNING SALESFORCE REPORTS

- 1) In Salesforce, click the Reports Tab...
- 2) then New Report.



- 3) In the next screen, click the PLUS (+) next to the “Other Reports” folder...
- 4) Then “FIGMENT Projects”...
- 5) Then the “Create” button.

salesforce 13

Search... Search

Don Rider Help & Training Artist Management

Home Chatter Reports Dashboards FIGMENT Events FIGMENT Projects FIGMENT Schedules FIGMENT Areas FIGMENT Locations +

Create New Report

Help for this Page

Select Report Type

Quick Find

- Organizations & Contacts
- Customer Support Reports
- Activities
- Administrative Reports
- Other Reports 3**
 - FIGMENT Artists
 - FIGMENT Artists with FIGMENT Project
 - FIGMENT Artist History
 - FIGMENT Events
 - FIGMENT Events with FIGMENT Event Hours
 - FIGMENT Events with FIGMENT Areas
 - FIGMENT Event History
 - FIGMENT Projects 4**
 - FIGMENT Projects with FIGMENT Event
 - FIGMENT Projects with Account
 - FIGMENT Project History

Preview
No preview available.

Cancel Create 5

In the “Unsaved Report” screen:

6) Choose Show “All figment projects”

7) Then scroll in the Fields sidebar to find “FIGMENT Event”. Click and drag that field to the filters bar...

salesforce

Search... Search

Report Type: FIGMENT Projects

Unsaved Report

Save Save As Close Report Properties Run Report

Fields All #

Quick Find

Drag and drop to add fields to the report.

- Do you have a show coming
- Do you need power to guara
- Do you need to be placed ne
- Electricity Requirements
- Event Close Date
- Event Start Date
- FIGMENT Event 7**
- How is your project interact
- How many people will you bi
- How much power do you ne
- How much space would you
- How will your project affect

Filters Add

Show All figment projects 6

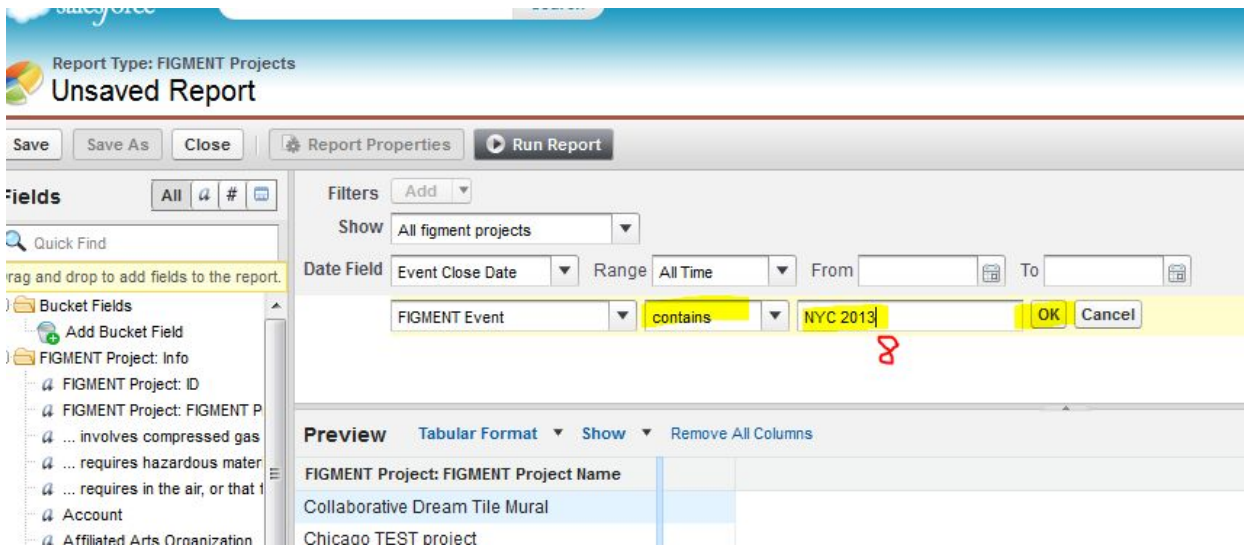
Date Field Event Close Date Range All Time From To

To add filters, click Add.

Preview Tabular Format Show Remove All Columns

FIGMENT Project: FIGMENT Project Name
Collaborative Dream Tile Mural
Chicago TEST project
iFly in the iIsland

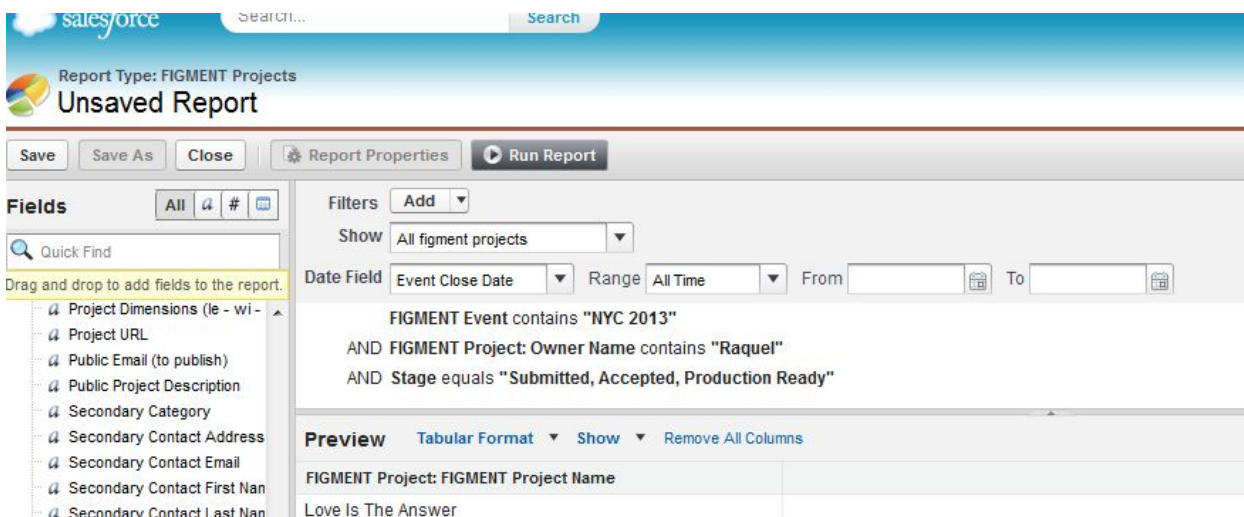
8) Change the fields to “contains” “NYC 2013” and click “OK.”



9) Add as many other filters as you like. In the example below, I set up a report to display all of the projects Raquel curates (“Owner Name”) and is still active in the system (“Stage”- Submitted, Accepted, Prod Ready”). You probably want those fields at minimum for a report.

To remove a filter, hover over the filter and click “Remove”. To edit a filter, do the same, but click “Edit.”

Note that this is ONLY A PREVIEW and Salesforce only shows the first 50 records or so that match your filters. To see the complete report, you need to Run the Report as shown in a later step.



10) Add the columns you want for a report by clicking and dragging the fields from the field sidebar to the Preview pane. In the example below, I create a report for all of Raquel’s projects, showing Primary Contact First and Last Names, and if the respective project requires a vehicle.

To remove a column, click the column header and drag it back to the fields sidebar.

The screenshot shows the Salesforce report builder interface. The report is titled "Unsaved Report" and is of type "FIGMENT Projects". The filters are set to "All figment projects", "Event Close Date" (All Time), "FIGMENT Event contains 'NYC 2013'", "AND FIGMENT Project: Owner Name contains 'Raquel'", and "AND Stage equals 'Submitted, Accepted, Production Ready'". The preview table has the following data:

FIGMENT Project: FIGMENT Project Name	Primary Contact First Name	Primary Contact Last Name	Will your project require a vehicle?
Love Is The Answer	john	gelardi	Yes
The Seagul Project	Mandy	Goodwin	No
Symphony	Dan	Toth	No
Weigh Your Words	Jessica	Beels	Yes
Global Indigenous Ceremonial Change Process	Barry	Tillman	Yes
PeacockFeatherBlessings	Jesse	Greene	No
SMASH TYPE	Ben	Weber	No
String Art	Kim	Holleman	No
CrissCross	Azmi Mert	Erdem	No

11) Once you’re happy with your report preview, click “Run Report.”

The screenshot shows the same Salesforce report builder interface as above, but with the "Run Report" button highlighted in yellow. The report title is "Unsaved Report" and the filters are the same as in the previous screenshot.

12) Yay! You’ve got a report. Now you’ve got options.

- A) Click “Customize” to edit your report, if you don’t like what you see, or want to add more to it.
- B) Click “Save As” to save your report for future use. You’ll see it listed on the main “Reports” page when you click that tab at the top. Highly recommended—you can create a generic report to save time the next time you need to run a report.
- C) Click “Export Details” to save your report in Excel format for further slicing and dicing.

Report Generation Status: Complete

Report Options:

Summarize information by: Show:

Time Frame: Date Field: Range:
 From: To:

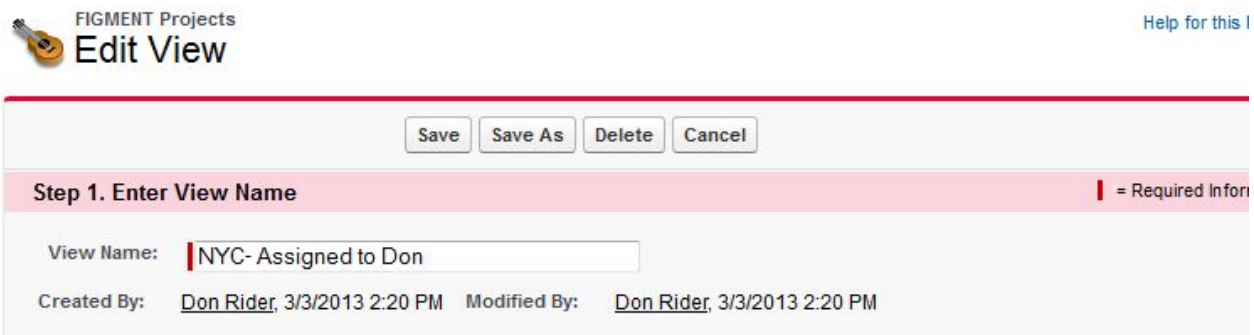
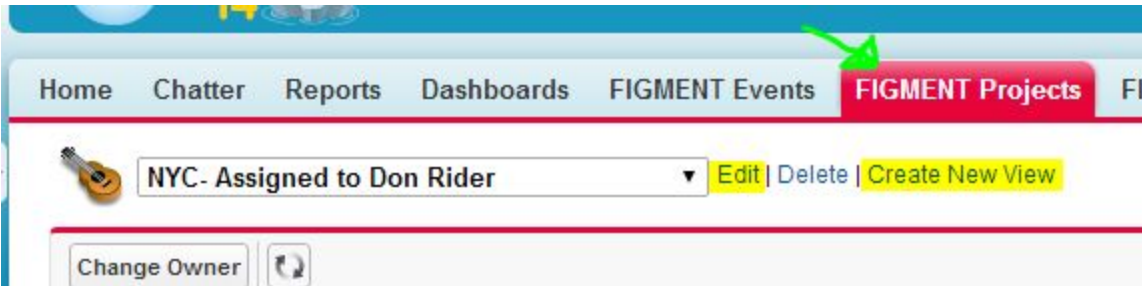
Run Report ▾ Hide Details **Customize** **Save As** Printable View **Export Details**

Filtered By: [Edit](#)
 FIGMENT Event contains NYC 2013 [Clear](#)
 AND FIGMENT Project: Owner Name contains Raquel [Clear](#)
 AND Stage equals Submitted, Accepted, Production Ready [Clear](#)

FIGMENT Project: FIGMENT Project Name	Primary Contact First Name	Primary Contact Last Name	Will your project require a ve
Love Is The Answer	John	gelardi	Yes
The Seagull Project	Mandy	Goodwin	No

3. PROJECT VIEW SETUP

To set up a project view in Salesforce that shows all of your projects:



Returning users, note that you must change the year on the filter.

Step 2. Specify Filter Criteria

Filter By Owner:

All FIGMENT Projects
 My FIGMENT Projects
 Queue

Filter By Additional Fields (Optional):

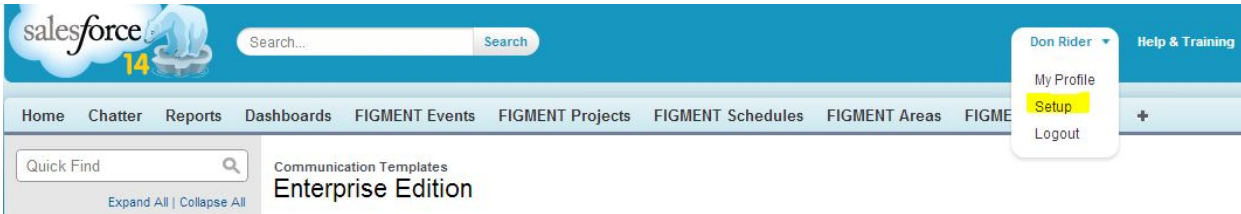
Field	Operator	Value	
<input type="text" value="Owner Last Name"/>	<input type="text" value="equals"/>	<input type="text" value="Rider"/>	AND
<input type="text" value="FIGMENT Event"/>	<input type="text" value="contains"/>	<input type="text" value="nyc"/>	AND
<input type="text" value="Created Date"/>	<input type="text" value="greater than"/>	<input type="text" value="1/1/2014"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text" value=""/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text" value=""/>	

[Add Filter Logic...](#)

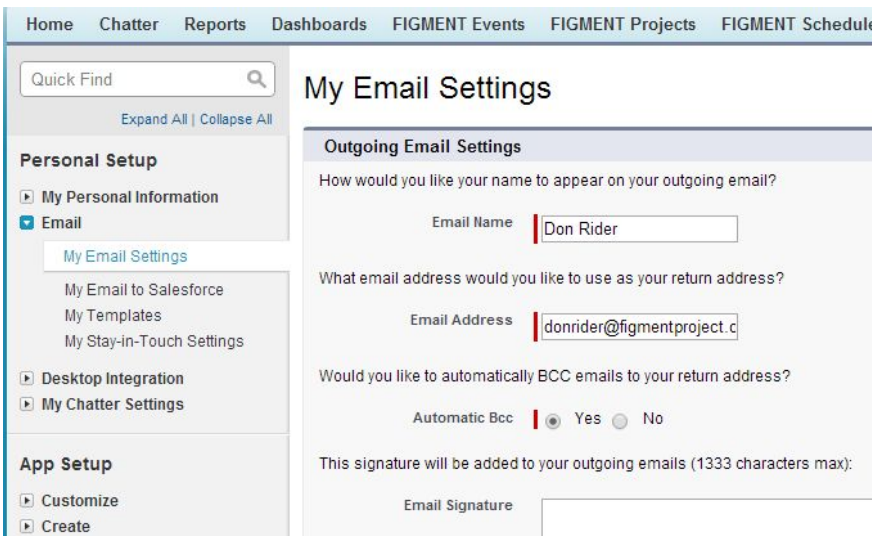
Step 3. Select Fields to Display

Available Fields		Selected Fields	
Record ID	Add <input type="button" value="▶"/>	FIGMENT Project Name	Top <input type="button" value="⏪"/>
... involves compressed gas		Owner Last Name	
... requires hazardous materials	Remove <input type="button" value="◀"/>		Down <input type="button" value="⏵"/>
... requires in the air, or that flies			Bottom <input type="button" value="⏩"/>
Account			
Affiliated Arts Organization			
Any other placement requirements			
Artist Participants			
Costs (optional)			
Curator			
Curatorial Notes			
Does your project involve fire?			
Does your project need a wall etc			
Does your project require a quiet or med			
Does your project require darkness?			

4. SETTING UP A TEMPLATE



Check those settings and adjust them as you see fit. You may wish to add a signature here as well.



- Administration Setup
 - ▾ Manage Users
 - ▾ Manage Apps
 - ▾ Company Profile
 - ▾ Security Controls
 - ▾ Domain Management
 - ▾ Communication Templates
 - Email Templates
 - Mail Merge Templates
 - ▾ Translation Workbench

Home Chatter Reports Dashboards FIGMENT Events FIGMENT Project

Quick Find

[Expand All](#) | [Collapse All](#)

Personal Setup

- ▾ My Personal Information
- ▾ Email
- ▾ Desktop Integration
- ▾ My Chatter Settings

Communication Templates
Enterprise Edition

Communication Templates

- Create or update email templates

Getting Started

- Tips for Using HTML Email Templates

Home Chatter Reports Dashboards FIGMENT Events FIGMENT Projects FIGMENT Schedules

Quick Find

[Expand All](#) | [Collapse All](#)

Personal Setup

- ▾ My Personal Information
- ▾ Email
- ▾ Desktop Integration
- ▾ My Chatter Settings

App Setup

- ▾ Customize
- ▾ Create

My Personal Email Templates

Below is a list of all your email templates in the folder selected. Click the new button to create new email templates when sending single emails. For mass emails, only text, HTML, and PDF are supported.

Folder My Personal Email Templates [Create New Folder](#)

[New Template](#)

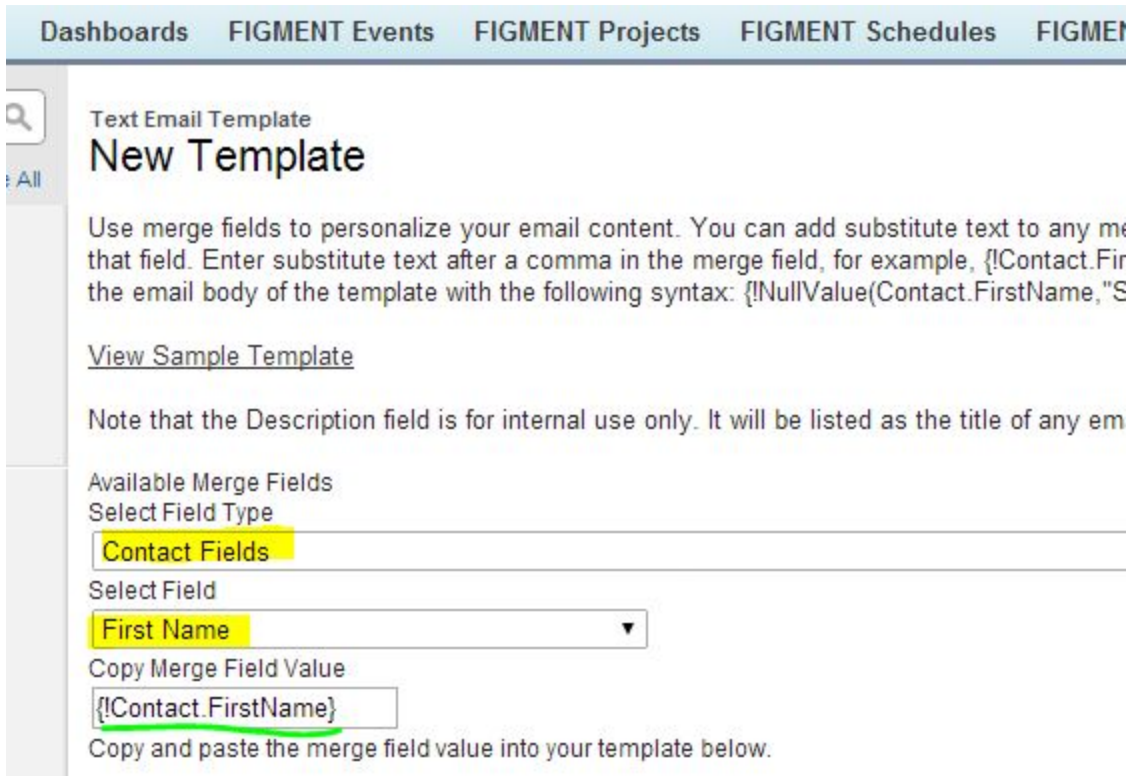
Email Template Name ↑	Template Type	Availability
No records to display.		

Choose the type of email template you would like to create.

- Text
- HTML (using Letterhead)
- Custom (without using Letterhead)

Use the “New Template” form to look up the generic database label ID aka “Merge Field Value” for the field you’d like to incorporate in your template. In this example, we’ll pull the First Name of the project contact. To do that:

- 1) Select “Contact Fields” in the first box
- 2) Select “First Name” in the next box
- 3) Select the text that appears in the third box and control+c to copy the text to your clipboard. Cut & paste operations are highlighted with green.



Dashboards FIGMENT Events FIGMENT Projects FIGMENT Schedules FIGMENT

Text Email Template
New Template

Use merge fields to personalize your email content. You can add substitute text to any merge field. Enter substitute text after a comma in the merge field, for example, {!Contact.FirstName}. The email body of the template with the following syntax: {!NullValue(Contact.FirstName,"S

[View Sample Template](#)

Note that the Description field is for internal use only. It will be listed as the title of any email.

Available Merge Fields
Select Field Type
Contact Fields
Select Field
First Name
Copy Merge Field Value
{!Contact.FirstName}
Copy and paste the merge field value into your template below.

Next, fill in your template.

- 1) Select your personal folder to save the template to.
- 2) Check “Available for Use”
- 3) Enter a name for your template.
- 4) Add a subject and body. In this example, we control+p to paste the Merge Field Value where we want the project owner’s name to appear when we use the template. In the example below, we use the First Name in the subject and greeting, and then the name of the project.
- 5) Click Save.

Email Template Information

Folder

Available For Use

Email Template Name

Encoding

Description

Subject

Email Body {!FIGMENT_Project__c.Name}"
to FIGMENT! You Rock!
Don"/>

You're ready to use your template!

5. USING AN EMAIL TEMPLATE

Home Chatter Reports Dashboards FIGMENT Events FIGMENT Projects FIGMENT Schedules FIGMENT Areas FIG

Task **Send an Email**

Send **Select Template** Attach File Preview Check Spelling Cancel

Edit Email

Email Format HTML [Switch to Text-Only]

From "Don Owen Rider" <dannonw@figmentproject.org>

Folder FIGMENT NYC

Name	Type	Description
Don's Welcome Template	Text	

The "Send an Email" form will populate with the template text and pull the information for the appropriate field and insert it for you. You can edit the text further if you like. Then hit send!

Subject Hi Sarah!

Body

Formatting Controls [How to use this]

Font Size **B** *I* U

Dear Sarah,

Thanks for submitting your project "Inflatable Pony Project" to FIGMENT! You Rock!

Don

APPENDIX D. SUGGESTED EMAIL TEMPLATES

Subject: FIGMENT-- Thanks for submitting your project!

Hi <<< NAME >>>

Thank you for submitting your project to FIGMENT! I'll be your representative on the Figment Curatorial Team working with you to ensure your project is a success. I'll be reviewing your submission with the Curatorial Team in the next few days, and will be in touch with any questions we might have. In the meantime, please review the additional information for artists included below, and let me know if you have any questions.

I'm looking forward to working with you and bringing <<< PROJECT >>> to Figment!

Sincerely,

Don Rider
Figment Curatorial Team

Important Dates for Artists

Please note the following dates that are key for artists:

<< Insert the current FIGMENT Project Timeline >>

Read the Handbook for Artists

Please take the time now to review the Handbook for Artists at the link below. It contains important information about producing art on Governors Island, and answers many common questions artists ask us.

<< Insert current link >>

Dear <Artist>,

Now that we've accepted your submission, I need to confirm a few basic details right away, as we use these for planning purposes and in the event guide. Please review the data from your submission below and address any questions I ask. Otherwise, please confirm that everything is accurate and complete by <<**Data Deadline**>>. I have to have all artist details confirmed shortly after that date, so please respond by then.

Thanks,

Don

FIGMENT Project Name	Wango Tangotron [TEST SUBMISSION]
Project URL	http://Http://www.nedtoogent.com
Public Email (to publish)	ikmalatesta@gmail.com
Public Project Description	Step into the Wango Tangrotron, a transcendental sensory experience that will leave you forever changed and improved as a human being.
Affiliated Arts Organization	The Federal Commission on Cave Man Studies
Organization URL	http://Http://fccms.gov
Primary Project Image	
Secondary Project Image	

Electricity Requirements	Yes
How much power do you need?	1 million volts
If you plan to bring a generator -	N/A
What is the electricity for?	The warp engine
Do you need power to guarantee success?	Yes

APPENDIX E. AUTOMATED EMAIL TEMPLATES

When an artist creates and later submits a project, he or she will receive the following email messages automatically.

Subject: FIGMENT Project: nyctest2 created

Dear Donald,

This email confirms that you have created a new project in the FIGMENT Artist Portal called nyctest2 for FIGMENT NYC 2014. The Artist Portal allows you to save your work and return to edit the form later before submitting your final entry. If you did not submit your form yet, simply log back into the Artist Portal [Here](#).

Click on the "Project Submissions" tab to open your saved form and continue working. Please note that all required fields are marked with an Asterisk*. If you feel that the required field is not applicable, please mark the box with N/A.

Remember to press the save button, located on the bottom right of the page, after completing each section.

In the meantime, please take a moment to review the information below, which includes details all artists should know about producing work at FIGMENT 2014.

We look forward to reviewing your submission!

All best,

The FIGMENT Team

//

FIGMENT Project Submission Confirmation

Dear Donald,

This email confirms that you have successfully submitted a new project in the FIGMENT Artist Portal called nyctest2 for FIGMENT NYC 2014. A curator will contact you in the next few weeks with further information and instructions.

We look forward to reviewing your submission!

All best,

The FIGMENT Team