

Salesforce optimizations lightning round

Three practitioners, three Salesforce
fixes, fifteen minutes each.



Creating Contact Reports With Salesforce Inbox





Dean Ernzen

Director, Application Services
University of Notre Dame



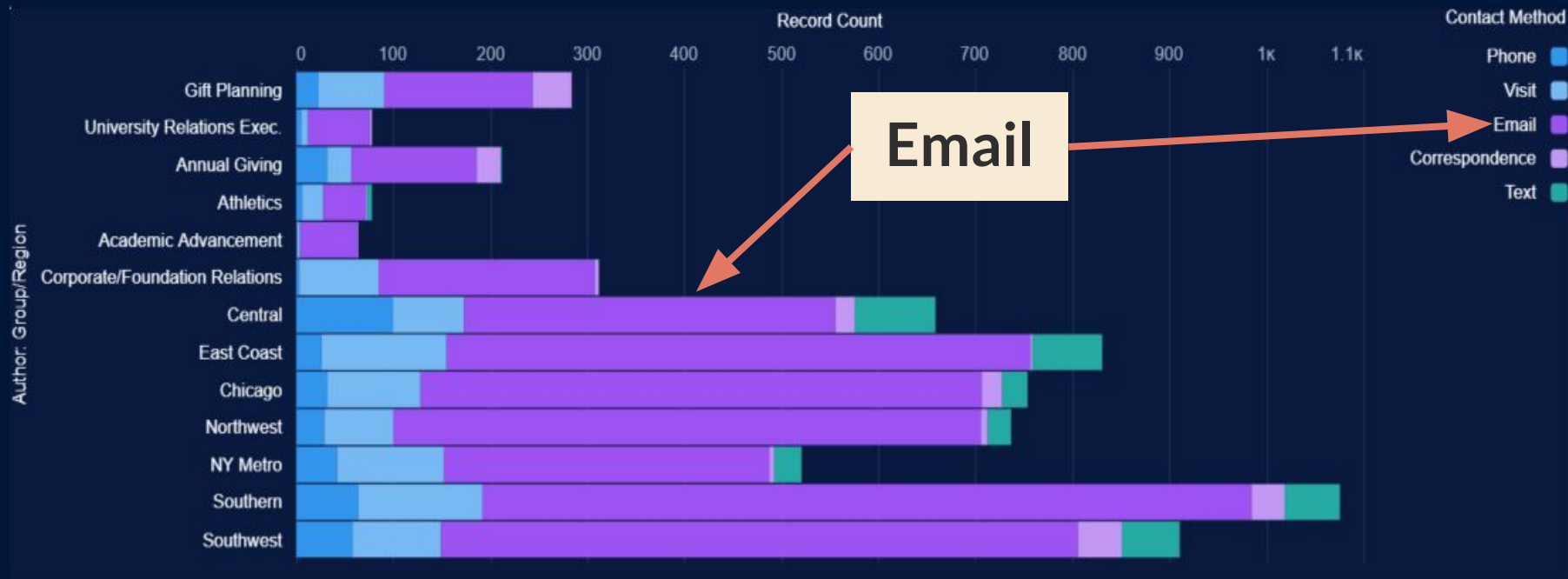
Creating Contact Reports with Salesforce Inbox

- Need for Email Contact Report tool
- Overview of Salesforce Inbox functionality
- Automation to support asceND data model
- Training and Change Management / lessons Learned



Contact Report Types

By Date Range



Aug 21, 2026, 10:28 AM - Viewing as Ascend Admin

As of Aug 21, 2026, 10:28 AM

6,839

Total Contact Reports
This FY as of 8/21/26

4,816

Email Contact Reports
This FY as of 8/21/26

71%

Percentage of Total Contact
Reports That Are Email

With **71%** of Contact Reports being Email, need to make it *easy* for Fundraisers to log them.

Why Did Notre Dame Choose Salesforce Inbox?

- Used another email integration tool since 2017 because it had a more flexible email matching approach (more than just the standard email field on the Contact).
- Salesforce Inbox has expanded email matching capabilities AND
- Salesforce Inbox is included with our Unlimited Edition Sales Cloud licenses so switching tools was a cost saving opportunity.

NOTE: Notre Dame is not using Einstein Activity Capture because our Fundraisers did not want ALL their emails captured in Salesforce. Rather, they wanted to select ones that contained important information.



Salesforce Inbox: Empowering Your Workflow with Smart Features

Salesforce Inbox: Smart Features & Integration



Smart Email Logging

Auto-captures & logs to relevant records via AI-driven matching. No manual tagging.



Templates & Snippets

Pre-built, customizable templates with dynamic data; AI-suggested personalized snippets for speed.



Bulk Actions

Send personalized emails to multiple contacts with tracking for nurture campaigns.

Focus: Streamlined email management, automation, and efficiency.

FEATURES & BENEFITS

Core Purpose & Real-Time Insights



Core Purpose: Log, track, and collaborate without leaving your inbox. Move critical info from email to Salesforce for action.



Dashboard

- Opens
- Clicks
- Replies

Email Tracking & Metrics

Real-time engagement metrics on open rates, click-throughs, and replies.



AI Enhancements (Add-on)

Available in Sales Cloud Einstein for advanced AI-driven insights and automation.



Focus: Data visibility, actionable insights, and enhanced collaboration.

Salesforce Inbox Side Panel

Salesforce

Search

Compose Related Tasks Feed

Log and Track Email

Related To: **Ernzen Dean 881641 Household**

People: **Dean Paul Ernzen**

0 Attachment(s) Included

☒ Log on Send ⓘ

☒ Email Tracking ⓘ

Pick Records

Availability ⓘ

Add

[Scheduling Link](#)

[Preferred Times](#)

[Next 3 Available Times](#)

Email Tracking ☒ On

Log this email to enable tracking

Send Later ⓘ ☐ Using Salesforce

Filter Filter

Sherri Lee Wolf, + 6 more

Re: INC0641310 - Copy function not working ...

Opened

Salesforce

Log Email

Search Organizations...

People Unselect All

Select one or more people records.

☒ Mr. Dean Paul Ernzen - 881641 - EM Household ... Ernzen Dean 881641 Household Spouse: Sherri Ernzen

Other

Select one object to log the email to. Select None to log the email to only the selected people records.

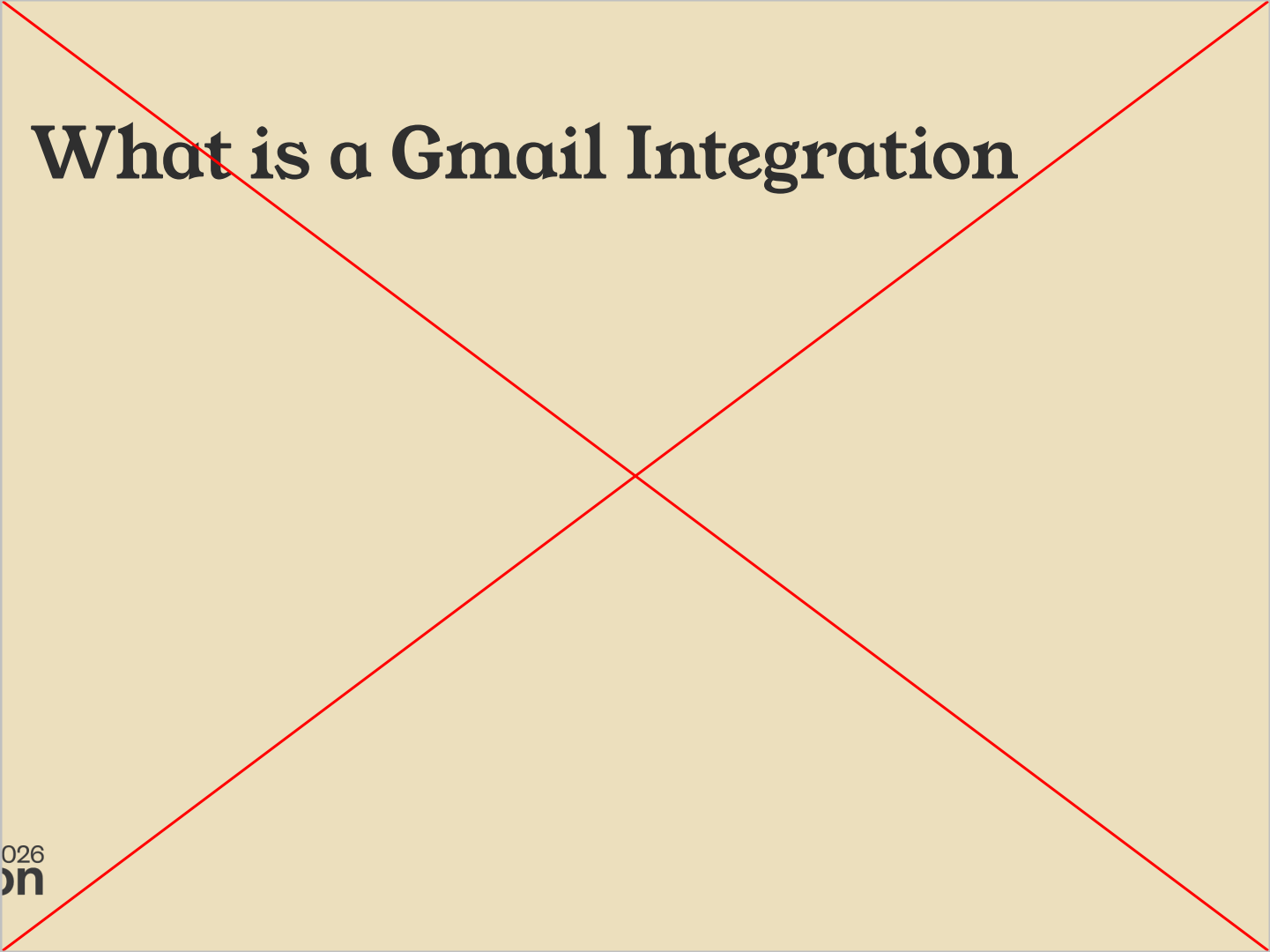
☐ None

☒ Ernzen Dean 881641 Household Primary Co... Dean Paul Ernzen

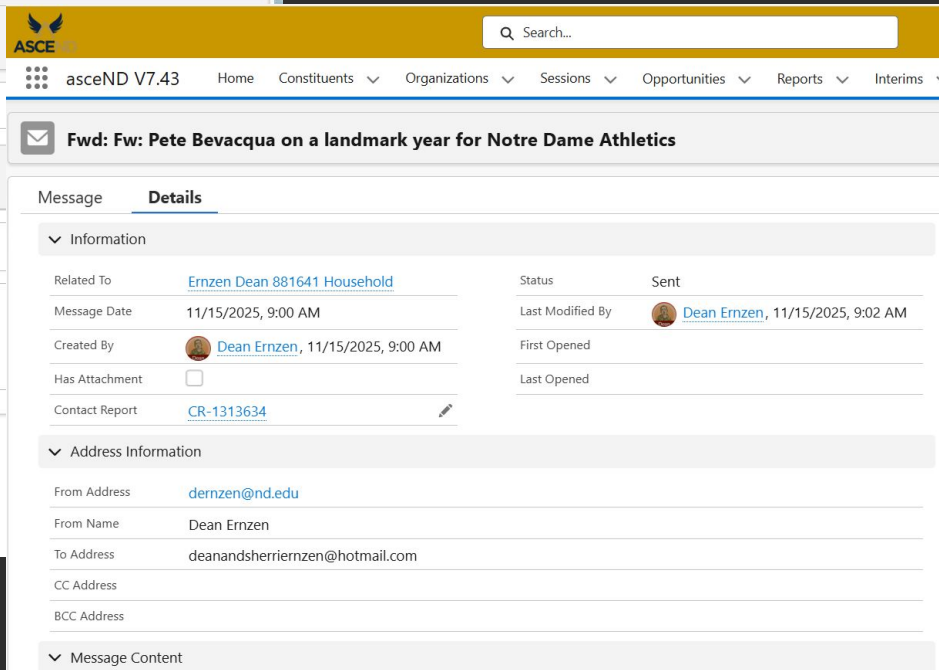
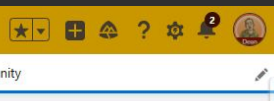
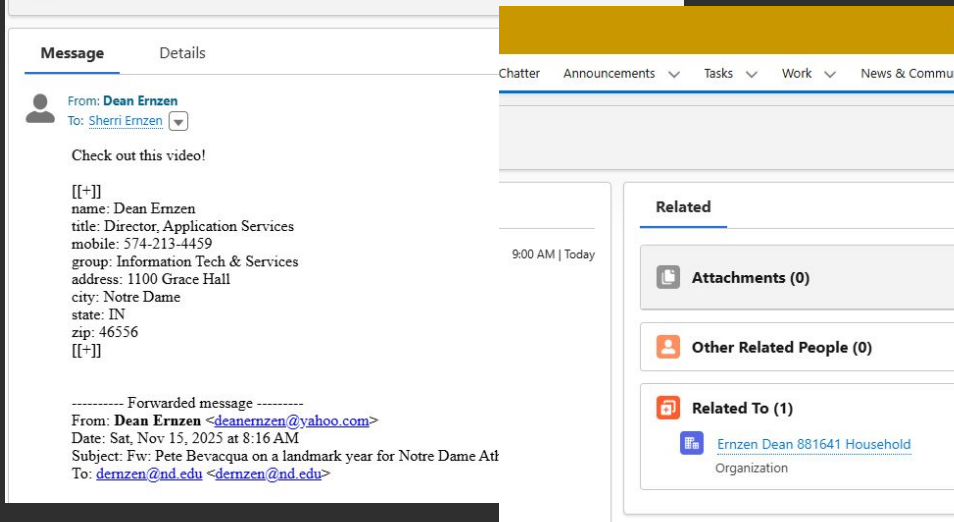
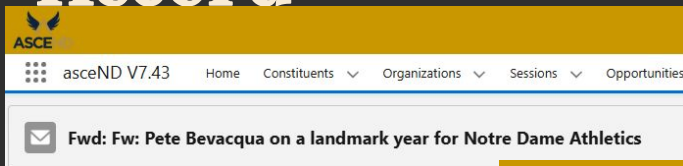
☒ Always remind me to log

Cancel Save

What is a Gmail Integration



Standard Functionality – Email Message Record



View Email Messages on the related records
or via Reports

Standard Functionality – Email Message Relation Records

SF Inbox Presentation - Excel

	A	B	C	D	E	F	G	H	I	J
1	CreatedById	CreatedDate	EmailMessageId	Id	IsDeleted	RelationAddress	RelationId	RelationObjectType	RelationType	SystemModstamp
2	0054x000000zZmNAAU	2025-11-15T14:00:18.000Z	02sOt00000HbLrhIAF	0CZOt00000G7S9dOAF	FALSE	derenzen@nd.edu			FromAddress	2025-11-15T14:00:18.000Z
3	0054x000000zZmNAAU	2025-11-15T14:00:18.000Z	02sOt00000HbLrhIAF	0CZOt00000G7S9fOAF	FALSE	deanandsherriernzen@hotmail.com	003Pk000006rZv0IAE	Contact	ToAddress	2025-11-15T14:00:18.000Z

Data Loader can be used to retrieve these records.

Standard Functionality – Task Record

The screenshot displays the 'asceND V7.43' web application interface. The top navigation bar includes a search bar and various menu items like Home, Constituents, Organizations, Sessions, Opportunities, Reports, Interims, Highspot Content, Cases, Chatter, Announcements, Tasks, Work, and News & Community. The 'Tasks' menu is currently selected.

On the left sidebar, there is a 'Recently Viewed' section with a search bar and a list of tasks. The main content area shows a task record for 'Email: Fwd: Fw: Pete Bevacqua on a landmark year for Notre Dame Athletics' assigned to 'Sherri Ernzen'. The task is marked as 'Completed'.

The task details are as follows:

Task Information	
Assigned To	Related To
Dean Ernzen	Ernzen Dean 881641 Household
Subject	Name
Email: Fwd: Fw: Pete Bevacqua on a landmark year for Notre Dame Athletics	Sherri Ernzen
Due Date	Status
11/15/2025	Completed
Comments	
To: deanandsherriernzen@hotmail.com	
CC:	
BCC:	
Attachment: --none--	
Subject: Fwd: Fw: Pete Bevacqua on a landmark year for Notre Dame Athletics	
Body:	
Check out this video!	
[[+]]	
name: Dean Ernzen	
title: Director, Application Services	
mobile: 574-213-4459	

Standard Functionality –Activity Timeline Showing Email/Task

The screenshot displays the ASCE asceND V7.43 interface. The top navigation bar includes a search bar and various icons. The main navigation menu shows 'Organizations' selected. The left sidebar identifies the user as 'Planned Gift Donor' and shows details for the 'Ernzen Dean 881641 Household', including a 'Follow' button and links to 'Prospect Briefing Report', 'Contact Report', and 'Edit'. The main content area shows the 'Activity' tab for the 'General Pool'. The activity timeline is currently empty, with a message stating 'No activities to show. Get started by sending an email, scheduling a task, and more.' A red box highlights the 'November - 2025' section, which contains three email activities:

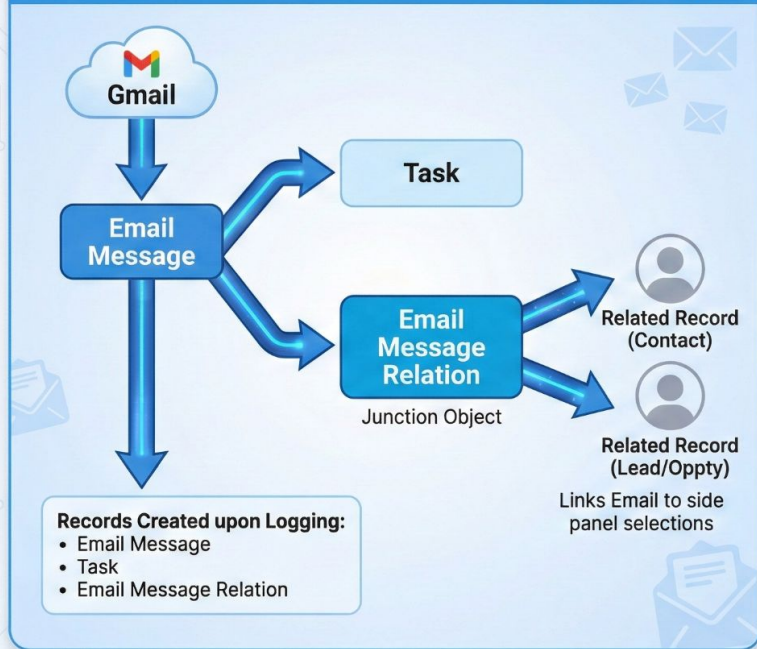
- Fwd: Fw: Pete Bevacqua on a landmark year for Notre Dame Athletics**
demzen@nd.edu sent an email to [Sherri Ernzen](#)
9:00 AM | Today
- Testing a new version of SF Inbox Flow**
demzen@nd.edu sent an email to [lynetteshunka@gmail.com](#) and 2 others
1:35 PM | Yesterday
- Testing Two Primary Constituents in Same Household**
demzen@nd.edu sent an email to [Dean Paul Ernzen](#) and 1 other
12:49 PM | Yesterday

The timeline also shows sections for 'August - 2024' and 'Last Year'.

Salesforce Data Model Comparison: Standard Inbox vs. Ascend Contact Reports

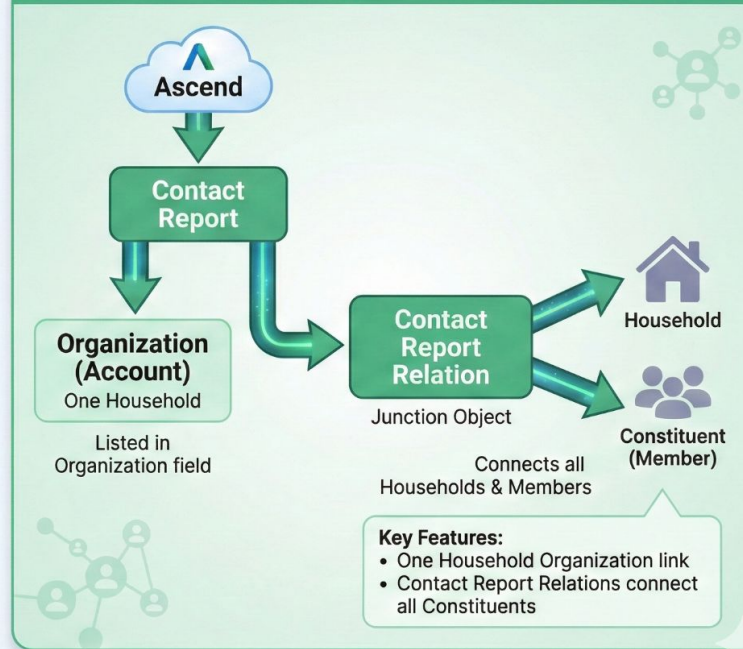
COMPARE & CONTRAST

Standard Salesforce Inbox Functionality (Email Log)



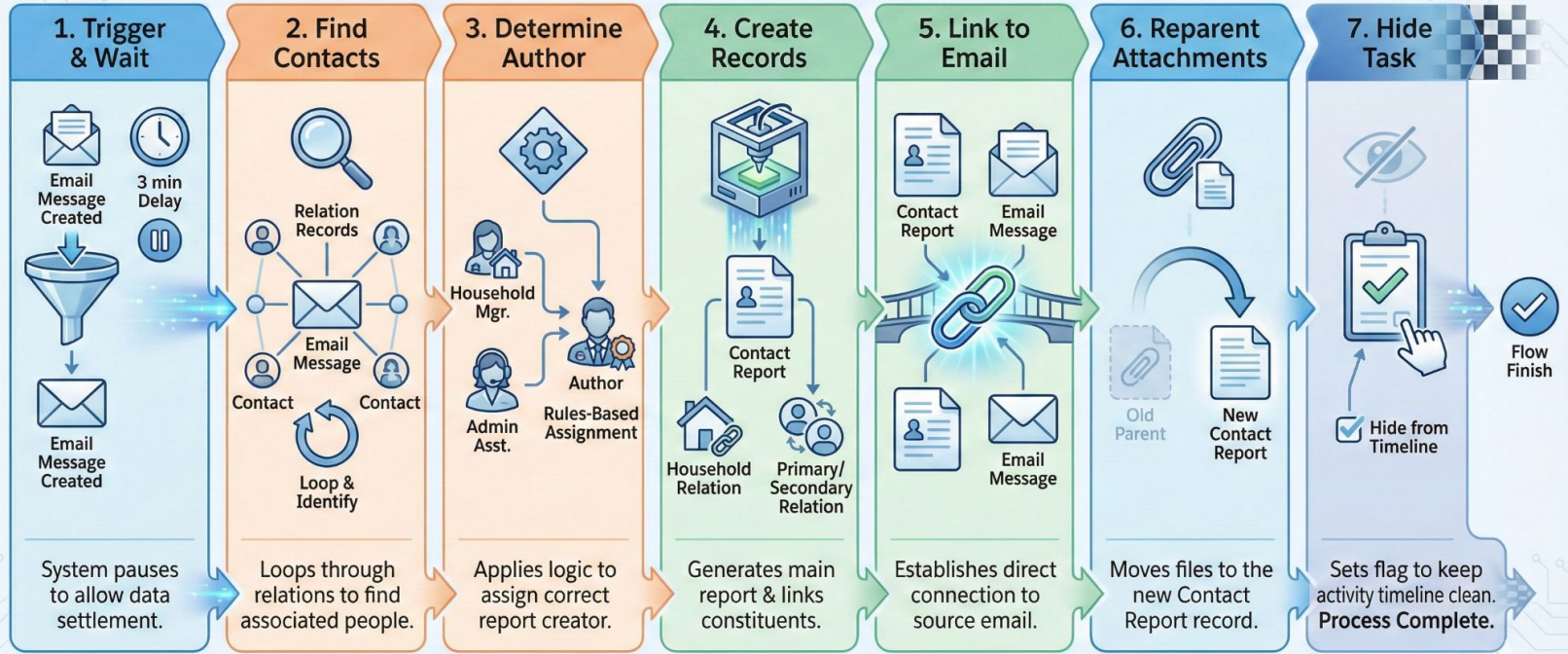
Focus: Logging communication activity & direct links.

Ascend Managed Package Data Model (Contact Report)



Focus: Structured reporting on household & constituent interactions.

Automated Email Processing: The Journey to a Contact Report (Salesforce Flow)



Flow Trigger - 3 Minute Delay

Configure Start

Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.

*Object
Email Message

Configure Trigger

Trigger the Flow When:

- ☒ A record is created
- ☐ A record is updated
- ☐ A record is created or updated
- ☐ A record is deleted

Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Make sure to conserve your org's resources.

Condition Requirements
All Conditions Are Met (AND)

Field	Operator	Value
Is Client Managed	Equals	True

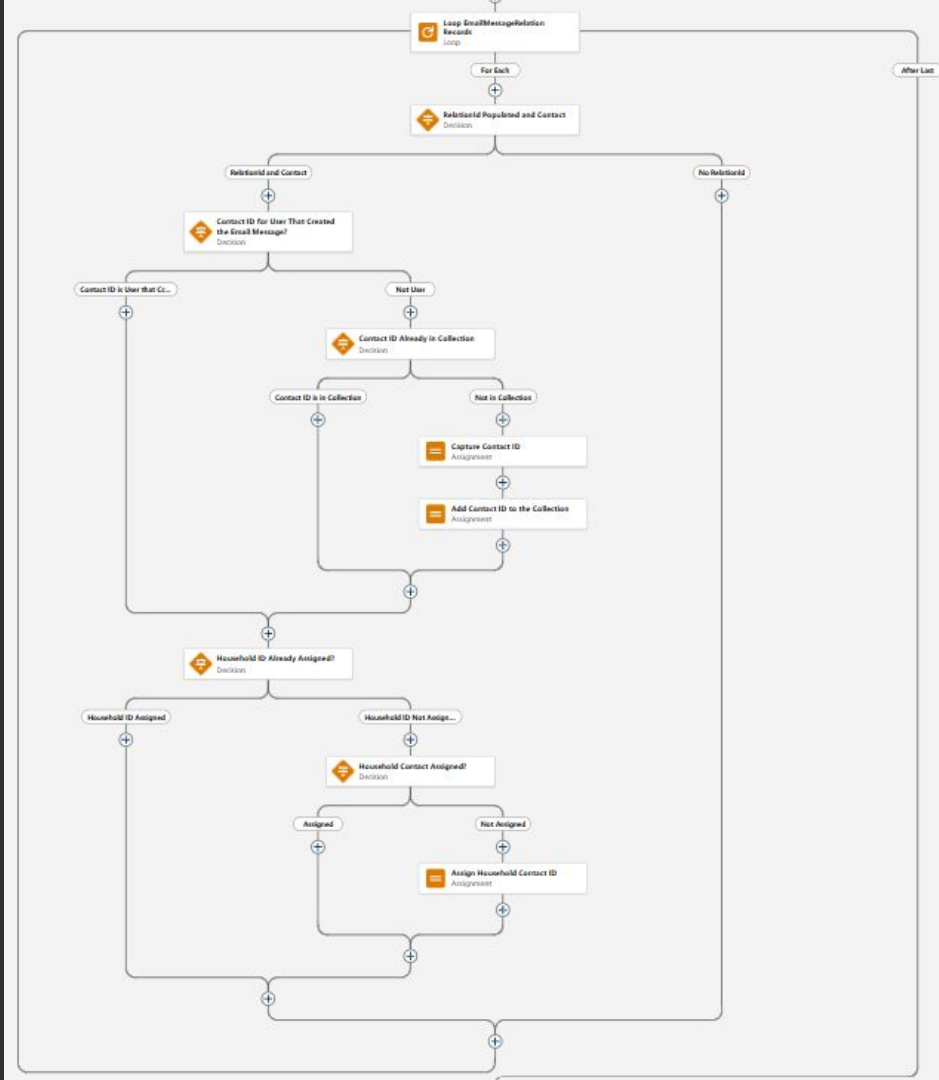
+ Add Condition

The 'Is Client Managed' checkbox on a Salesforce Email Message record indicates that the email (or event) is being managed by an external email client integration, such as Salesforce Inbox or Einstein Activity Capture, rather than standard Salesforce functionality like Email-to-Case.

Loop Email Message Relation Records

- Get Email Message Relation records and loop over them to find the Contacts associated with the Email Message.
- For each record, check the RelationID and if it is a Contact ID, then
- Proceed to create a collection of Unique Contact IDs
- If a Household ID was not assigned when the Email was logged, then take the Household ID for the first Contact that flows through the loop.

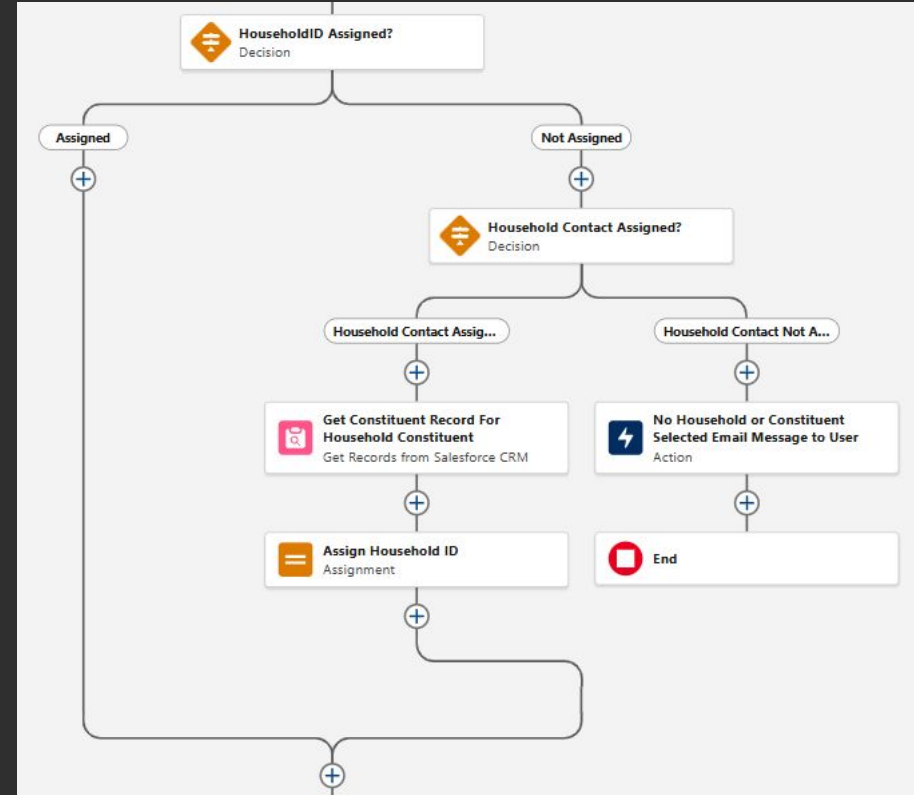
Gather Contact IDs from the Email Message Relation Records



Error Handling

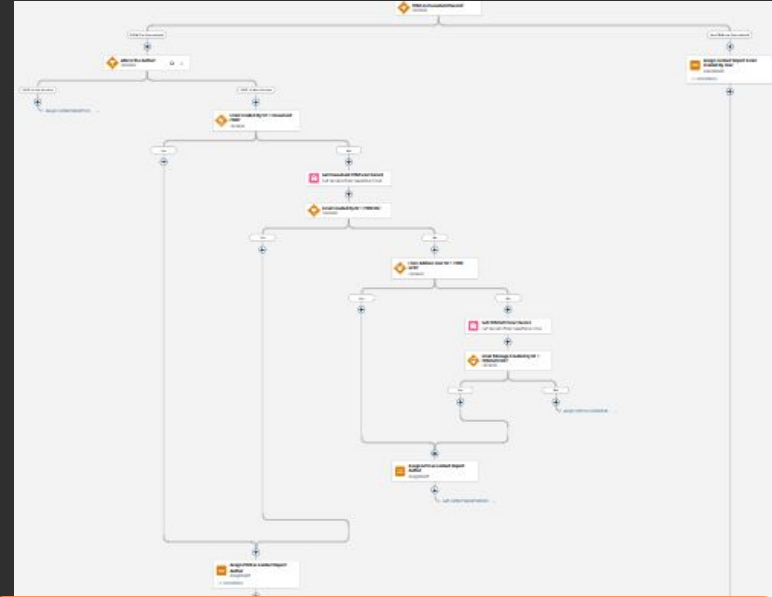
If no Household or Constituent were related to the Email, the User receives an email letting them know that the Contact Report could not be created and how they can address this issue.

Feedback loop to users to remind them that they need to select a Household or Constituent when logging an email



Determine Contact Report Author

- Fundraisers are measured on Contact Reports so assigning the correct Author is important AND
- Administrative Assistants can log emails on behalf of of the Fundraiser, logic is required to properly assign the Author.
- For the Household associated with the Contact Report, determine if;
 - Whether a Primary Relationship Manager (PRM) is assigned to the Household
 - If yes, is the User that created the Contact Report the Academic Advancement Advisor OR
 - PRM OR
 - PRM Assistant OR
 - Gift Planning Officer (GPO) assigned to the PRM OR
 - GPO Assistant

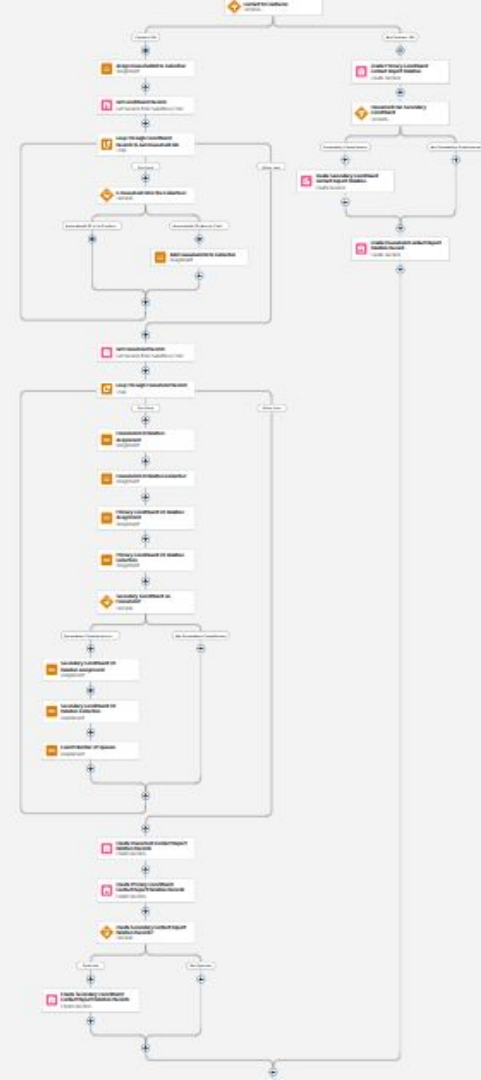


Assigning the correct author affects Fundraiser metrics.

Create Contact Report and Contact Report Relation Records

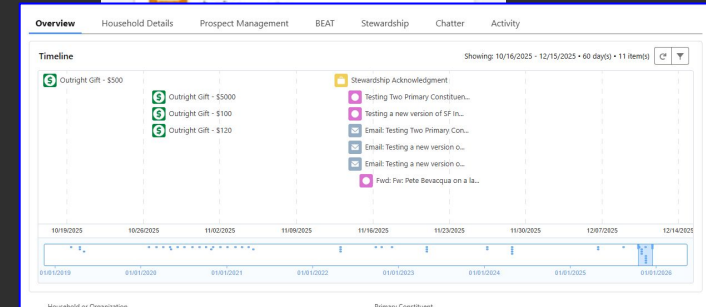
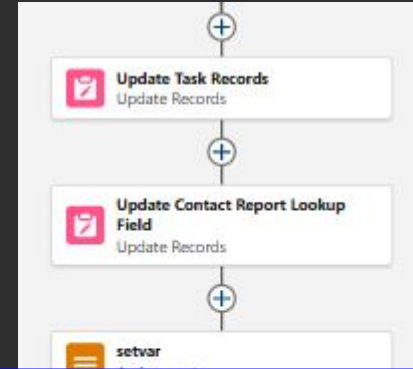
- If only a Household was linked to the Email message and there were no Contacts in the Email Message Relation records, create Contact Report Relations for the Primary and Secondary Constituents in the Household.
- If Constituent IDs were gathered, loop over the Constituent records and gather the Household IDs. This is needed because Contact Report Relation records are created for Households as well.
- Contact Report Relation records are created for the Constituents linked to the Households.
- Contact Report Relation records are created for the Households and Constituents so users can see Contact Reports when viewing both Households and Constituents - Contact Report Relation Related Lists

Visibility of Contact Report Relation Records when the user is viewing Households or Constituents



Link to Email Message, Attachments, and Task Update

- Create Links between the Contact Report and Email Message records
 - Allows the user to view tracking information since this cannot be moved from the Email Message to the Contact Report
- Reparent attachments
- Set a checkbox on the Task so it does not show in the Timeline

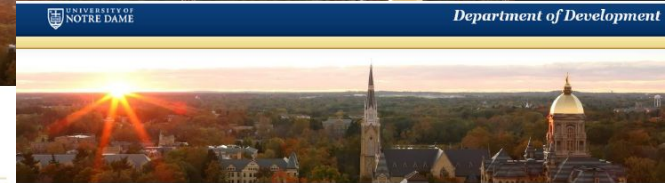
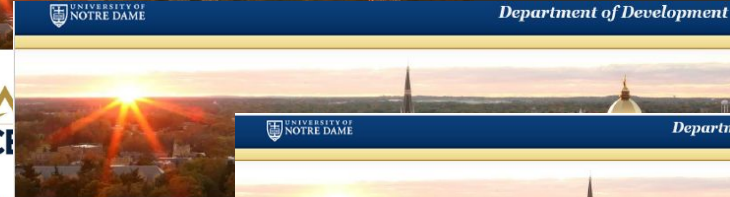
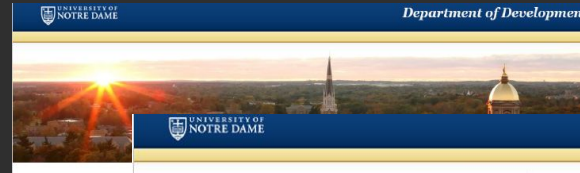


Bring Email Message information onto the Contact Report and link to the Email Message for tracking (opens and clicks).

Training and Change Management

- Work Instructions
 - Installation
 - Use
 - Tracking
- Training for Beta Group
- Multiple training sessions for fundraising staff and supporting units
- Permission assigned after training
- Chatter Group for support
- Added the training to our New Employee onboarding

Communication, Phased Rollout, Training, and Support



Work Instru

1. Access the
2. Using the
3. Results for

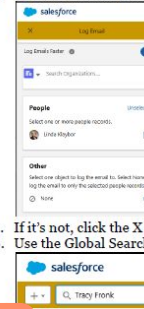


4. Click on th
5. Click on th



Work Instructions - 1

1. Access your Gmail acc
2. Select and open a mes
3. Open the Salesforce I
4. The email of the pers



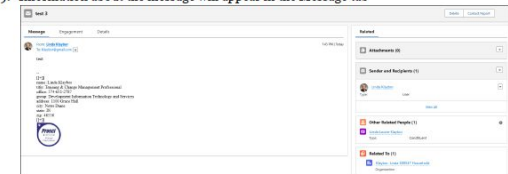
5. If it's not, click the X t
6. Use the Global Search



- [Work Instructions](#)
- [Business Rules](#)
- [Owner/Users](#)
- [Policy](#)
- [Document History](#)

Work Instructions - Salesforce Inbox Tracking and Engagement

1. Log into asceND
2. Search for and Navigate to the Constituent/Household record
3. Click on the Activity tab
4. Overview Household Details Prospect Management BEAT Stewardship Chatter **Activity**
5. The Activity Window will appear with all of the email messages sent via gmail that were recorded with Salesforce Inbox
6. Notice that the tracking is on and will inform users if the email was opened/unopened, the time frame since it's been opened.
7. test 3 Unopened You sent an email to klaytor@gmail.com
8. Select the subject of the email
9. Information about the message will appear in the Message tab



Thank
you.



KindCon²⁰²⁶

Streamline Gift Entry with Apps

Todd Rheinfrank

Carnegie Mellon University

KindCon 2026 • Sept. 2, 2026



1/2

Of annual gift transactions

High volume

Rich

Incoming data is unusually
complete

Ready to automate

Few

Outliers require intervention

Human judgment

Complete data. Fragmented process.

Import into large batches → review every gift

→ identify known data gaps → email to colleague

→ communicate resolution → complete processing

The work was effective — not optimized.



Understanding the work before
choosing the tools.

- 1 Where does the data diverge
from pristine?
- 2 What actions interrupted the
workflow?
- 3 Where does staff expertise add
the most value?





ORIENT

See what arrived and what needs attention.



RESOLVE

Address exceptions that require judgment.



INITIATE

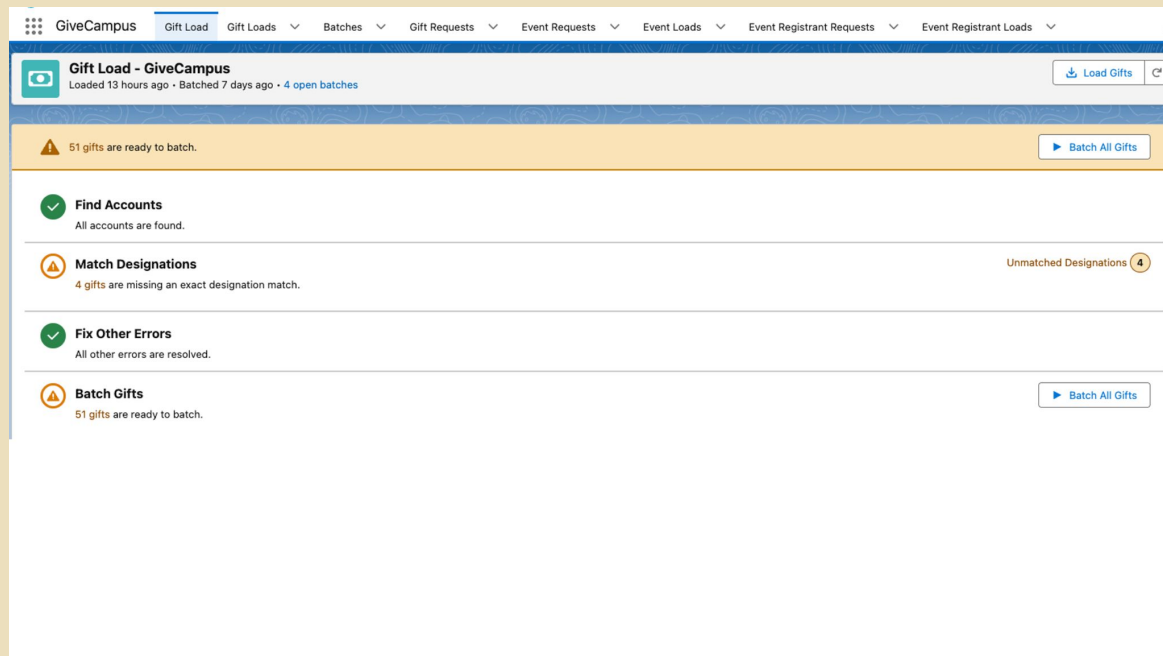
Batch all gifts after outliers are resolved.



HAND OFF

Review batches in Smart Batch.

The Gift Load App



Upgraded working experience



VISIBLE

The morning's work is immediately clear.



CONSISTENT

Routine work moves forward predictably.



FOCUSED

Maximizes the expertise of the team.



CONNECTED

Staff, data and AdvancementRM.

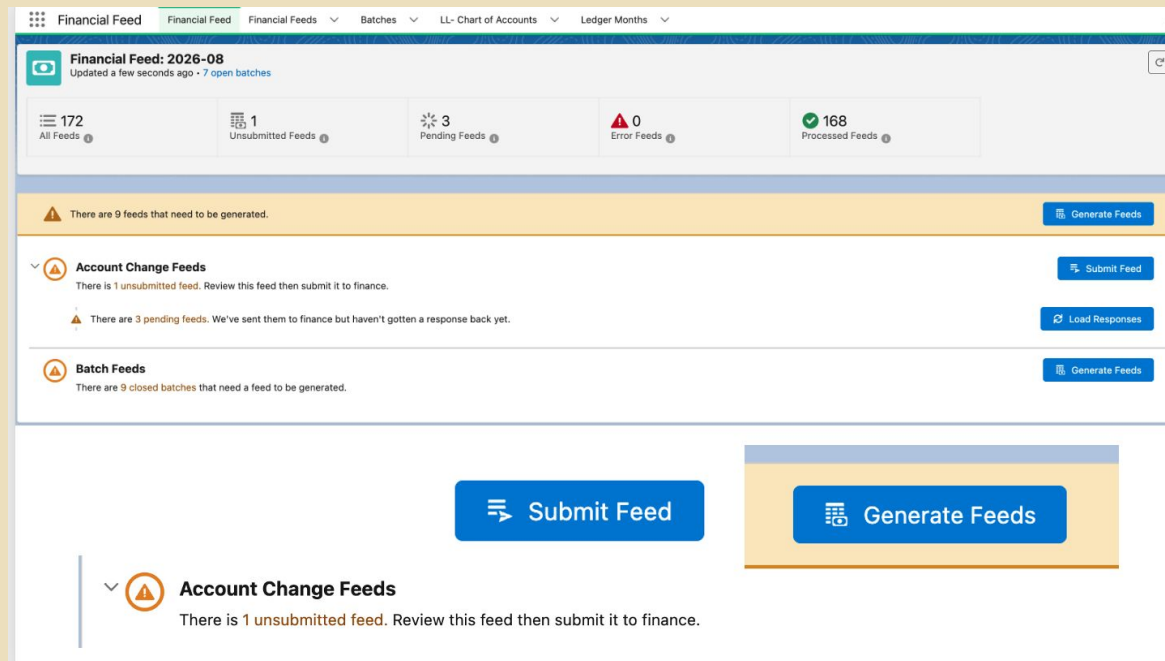
Same approach shaped Payroll App

The screenshot displays the Payroll App interface. The top navigation bar includes links for Payroll, Payroll Exports, Payroll Imports, Recurring Gifts, and Batches. The main dashboard shows the current status for August 2026, with 108 recurring gifts, 3 open batches, and 4 days remaining. A warning message indicates that 3 open batches need to be closed. Below this, there are sections for Import Payments (3 open batches) and Export Payroll File (Export complete).

The Batches section is shown in a detailed view, displaying a table of 3 items sorted by Batch Number. The table has columns for Batch Number and Needs Review.

☐ Batch Number ↑	Needs Review
1 Batch 0361632	☐
2 Batch 0361633	☒
3 Batch 0361634	☐

Financial Feed App increased resilience



Same thinking applies to everyday friction

The screenshot displays a web application interface for account management. At the top, there's a navigation bar with 'Account' and various action buttons like '+ Follow', 'Edit', 'Delete', and 'Company / Org Research R'. Below this, a sub-navigation bar includes 'Account Details', 'Opportunities', 'Revenue', 'Relationships', and 'Notes & Files'. The main content area is divided into two primary sections: 'Gifts' and 'Cash (Gifts & Pledge Payments) (8+)'. The 'Gifts' section shows a table of commitments with columns for Gift/Pledge ID, Record Type, Gift Date, Total, Balance Due, Designation, and Payments. The 'Cash' section shows a table of payments with columns for Transaction ID, Method, Donor, Amount, Designation, Gift/Pledge ID, and Transaction Date. On the right side, there's a 'Billing Address' section with a map of Saratoga, CA, and a 'Related List Quick Links' section with various links like 'Alternate Channels (1)', 'Cases (0)', 'Opportunities (0)', 'Notes (0)', 'Alternate Account Names (0)', 'Activity Reports (0)', 'Contacts (1)', and 'Account History (7)'. The bottom of the interface has a 'New Event & Report' button and an 'Activity' section with tabs for 'Activity', 'Chatter', and 'Stewardship'.

Account

+ Follow Edit Delete Company / Org Research R

Account Details Opportunities **Revenue** Relationships Notes & Files

These gift details are available for informational purposes. Slight deviations may occur in the nightly gift transfer to T360.
For official reports, please contact Gift Records (gift-administration@andrew.cmu.edu) or Advancement Analytics (adv-reports@andrew.cmu.edu).

Gift Dashboard **Gifts** Research Research Proposals Entrepreneurial Funding

Commitments (Gifts, Grants and Pledges) (5)

5 Items • Sorted by Gift Date • Filtered by Record Type, Total • Updated a few seconds ago

	Gift/Pledge ...	Record Ty...	Gift Date ↓	Total	Balance Due ↓	Designation	Payments	\$
1	012048607	Gift	8/19/2026	\$260,000.00	\$0.00	Awaiting Desig...	\$260,000.00	\$
2	011093084	Pledge	9/24/2024	\$100,000.00	\$0.00	Catherine Fang...	\$100,000.00	\$
3	011325806	Pledge	4/28/2023	\$100,000.00	\$0.00	Catherine Fang...	\$100,000.00	\$
4	011359557	Pledge	9/28/2021	\$170,000.00	\$0.00	LTI Chinese Alu...	\$170,000.00	\$
5	011325245	Pledge	8/31/2021	\$500,000.00	\$0.00		\$500,000.00	\$

[View All](#)

Cash (Gifts & Pledge Payments) (8+)

8+ Items • Sorted by Donor Date • 4 Filters Applied • Updated a few seconds ago

	Transacti...	Method	Donor ...	Amount	Designation	Gift/Pledg...	Transacti...
1	027361594	Wire	8/19/2026	\$260,000.00	Awaiting Designation/Docume...	012048607	8/19/2026
2	025681318	Wire (Pledge P...	8/19/2025	\$50,000.00	Catherine Fang 57404.1.5009...	011093084	8/19/2025
3	025852056	Wire (Pledge P...	8/19/2025	\$50,000.00	LTI Chinese Alumni Endowed ...	011359557	8/19/2025
4	025858987	Wire (Pledge P...	5/21/2025	\$50,000.00	LTI Chinese Alumni Endowed ...	011359557	5/21/2025

Billing Address

Billing Address

United States

Saratoga

GOLDEN TRIANGLE

West Valley C

Preferred Region 1

CA - San Francisco

Related List Quick Links

- [Alternate Channels \(1\)](#)
- [Cases \(0\)](#)
- [Opportunities \(0\)](#)
- [Notes \(0\)](#)
- [Alternate Account Names \(0\)](#)
- [Activity Reports \(0\)](#)
- [Contacts \(1\)](#)
- [Account History \(7\)](#)

Show All (31)

New Event & Report

Activity Chatter Stewardship

Filters: All time • All activities •

Surface the exceptions.

Streamline the routine.

Maximize the impact of your experts.

KindCon²⁰²⁶

Improving Event Data in Salesforce

THE UNIVERSITY OF TENNESSEE
UT FOUNDATION





Lindsey Reinstrom

Director of Event Technology & Strategy

UT Foundation



Matt Frank

VP, Tech Evangelism

Blackthorn

Agenda



UTFI



Before/Go-Live



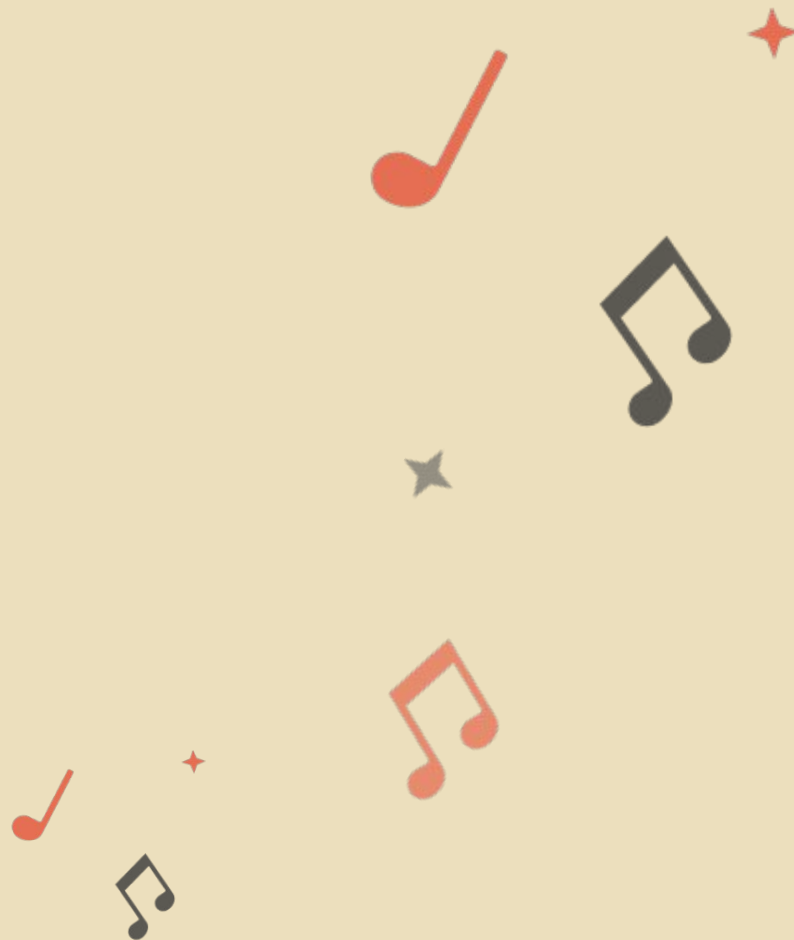
After



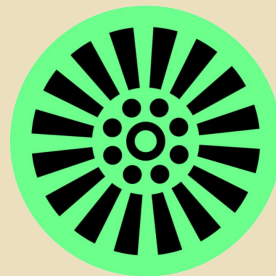
Present



Q&A



University of Tennessee Foundation (UTFI)



ascend



Timeline Overview



Before

Change Management
Legacy System Archives
SOPs & Templates



Go-Live

Training & Onboarding
Intake Request Forms
Reporting



After

Additional Functionality
Data Loads
Dashboards



Present Day

Flows
AI
Constituent Matching

Before

Primary Color (#) ⓘ

06422d

Card Color Theme ⓘ

Light

Font ⓘ

Montserrat

UTHSC Texting Opt-In

Additional Information

Name Tag (First & Last Name)

Education Information

UTHSC College

Class Year(s) (if applicable)

- BT Add an Attendee Record Manually to an Event.docx
- BT Add Smart Scheduler Component to Event Record.docx
- BT Attach an Event to Multiple Event Groups.docx
- BT Campaign Codes.docx
- BT Common Event Terminology.docx
- BT Confirmation Email Sender by Campus.xlsx
- BT Confirmation Reminder Emails - Smart Scheduler.docx
- BT Create a Calendar Listing.docx
- BT Create a Dynamic UI Event with Event Builder.docx
- BT Create a Form.docx



Go-Live

What do you need for your event?

Event Title

Primary Event Group (Calendar) Listing

Event Category

Event Start Date/Time

Event End Date/Time

Registration Start Date

Registration End Date

Event Campaign / Campaign Name (Appeal Code)

Event Contact Name

Event Contact Title

Event Contact Phone

Event Contact Email

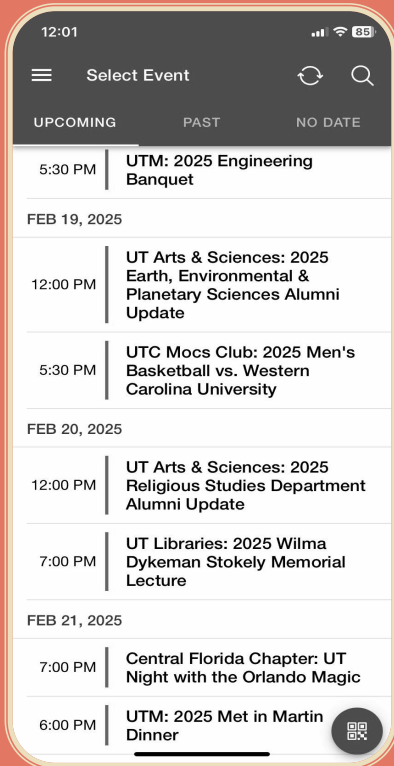
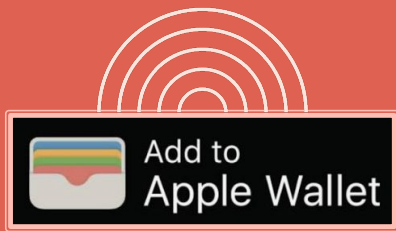
Designation code for optional donation

Suggested amount(s) for optional donation

Enable "Cancel Registration"? This allows a registrant to cancel their registration up until the Registration End Date selected above.

Additional event registration fields for primary registrant



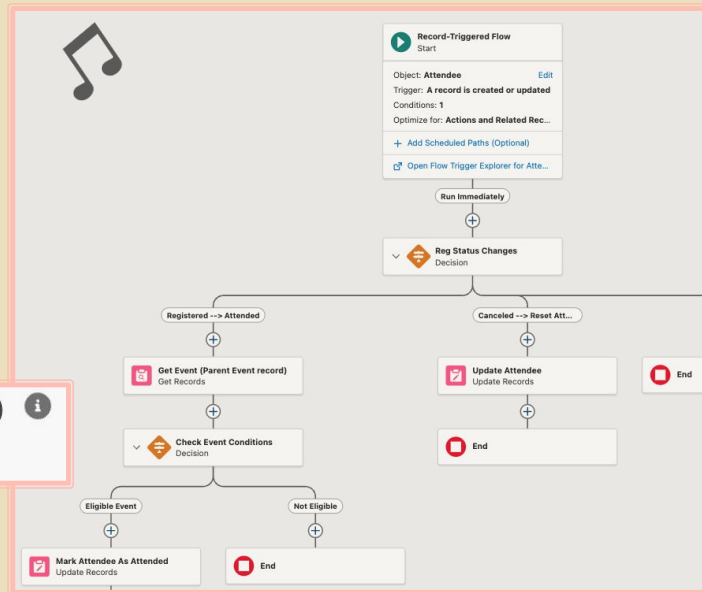


After



Present

Is Event Check-In (Day Of) ⓘ



ENTER HERE

SCAN QR CODE TO
REGISTER

Show confirmation screen at
check-in table.



Thank You

lreinstrom@utfi.org