Creating Constituents and Supporters in Salsa

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Agenda

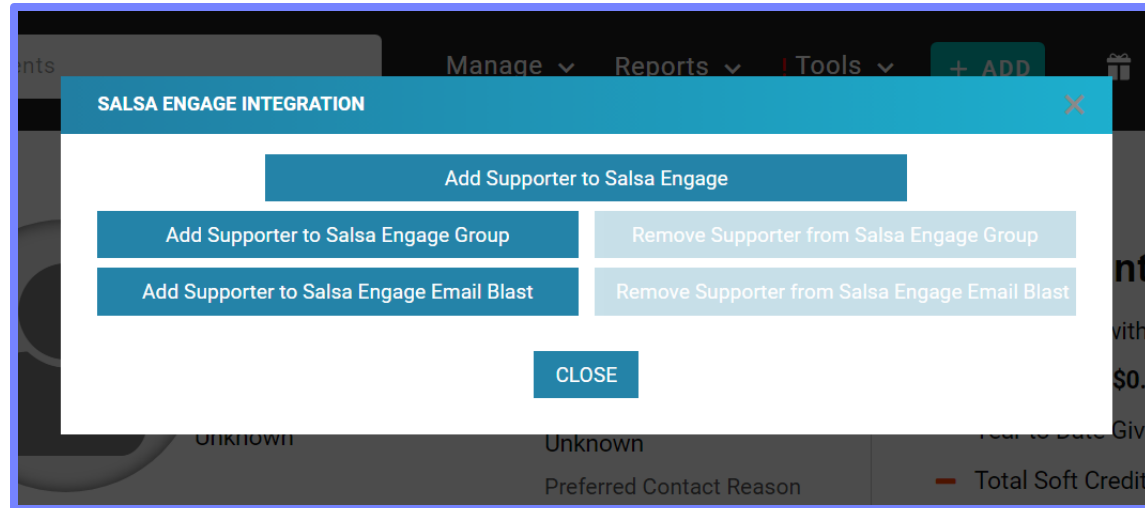Add a Constituent Record

Syncing Constituents to Engage

Add a Supporter

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Add a Constituent Record in Salsa CRM

Sync Constituents to Salsa Engage

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Manual and Automatic Syncing Options

Note: Supporters in Engage that interact with Forms or Email Blasts will automatically sync to CRM

- You can sync any Constituent **with an email address** to Salsa Engage, creating a new Supporter

- **Email Status** must be set to **Unknown** or **Opt-In**

- Constituents will automatically sync if using a **Smart Group**

Three ways to manually sync Constituents to Engage

- Add Supporter to Salsa Engage

- Add Supporter to Salsa Engage Group

- Add Supporter to Salsa Engage Email Blast

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Add a Supporter in Salsa Engage

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Additional Resources

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Additional Training Opportunities

Other targeted webinars available in Bonterra Academy

(live and recorded)

1. Adding Salsa CRM Users
2. Creating Constituents and Supporters
3. Adding Donations

Visit the question bubble in your software to find Documentation or the Help Center to find a library of help articles.

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- Submit a Support Request through the question bubble
- Call 866-935-8281

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Training Survey

Please complete the survey:

We value your feedback!

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Q & A

- Ask questions about functionality covered in this training

- Ask trainer to redo a demo

- Ask real-life application questions

- Or sign off and we will see you in the next training!

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Thank you for attending!

We hope to see you
in future trainings.

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