LOCATE

BackOffice Thinking

For Maryland

LAND TRUST ROUNDTABLE AGENDA

Stewardship Series IV

June 27, 2017

10:00am – 1:30pm

https://locateapplication.com/

www.backofficethinking.com

BackOffice Thinking

We focus on your technology, so you can focus on your mission.

Developing Strategies & Implementing Technology for Your Nonprofit Organization

Salesforce & Nonprofit Success Pack

(NPSP)

Salesforce & LOCATE

Both LOCATE and the NPSP are applications within Salesforce.

LOCATE

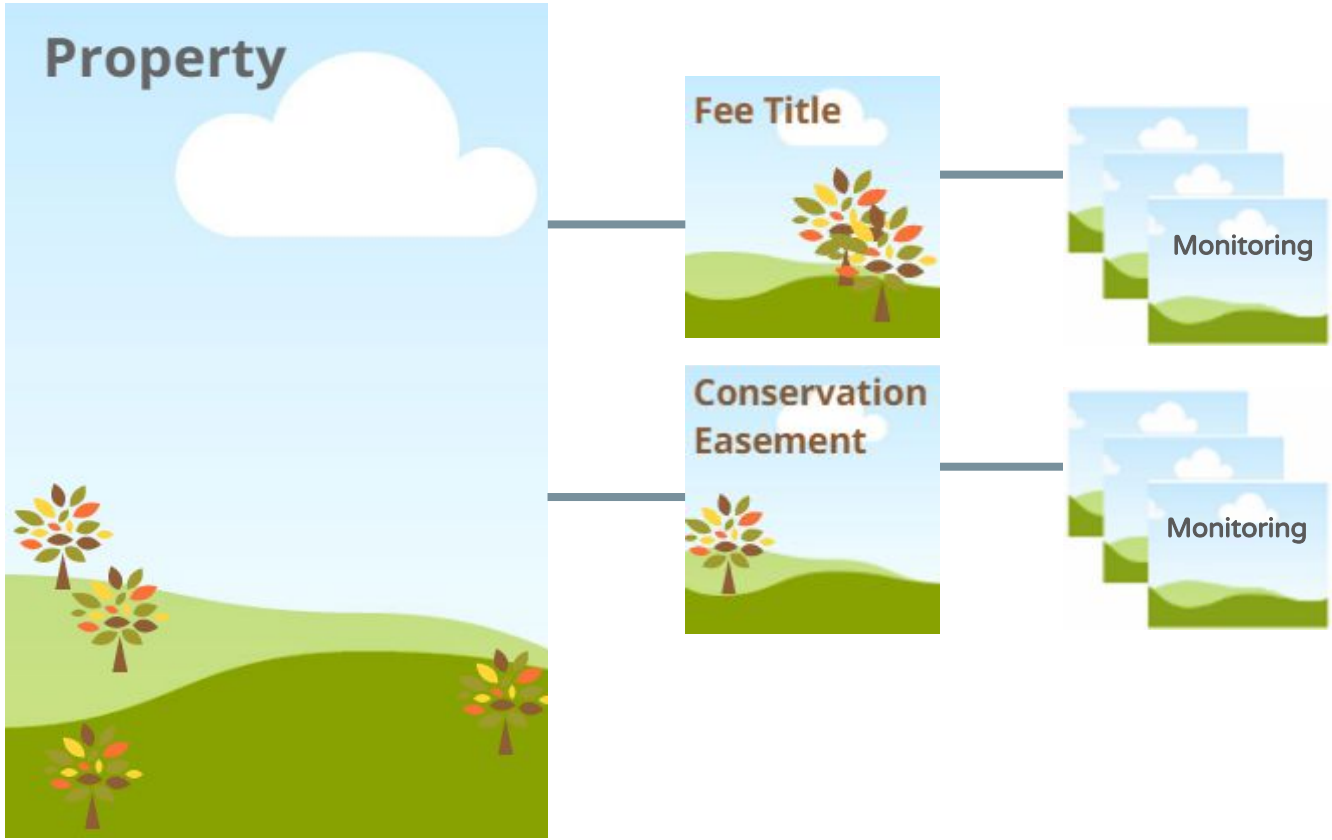
Base Objects:

- Property
- Interest
- Monitoring

Property Records:

Interest Records:

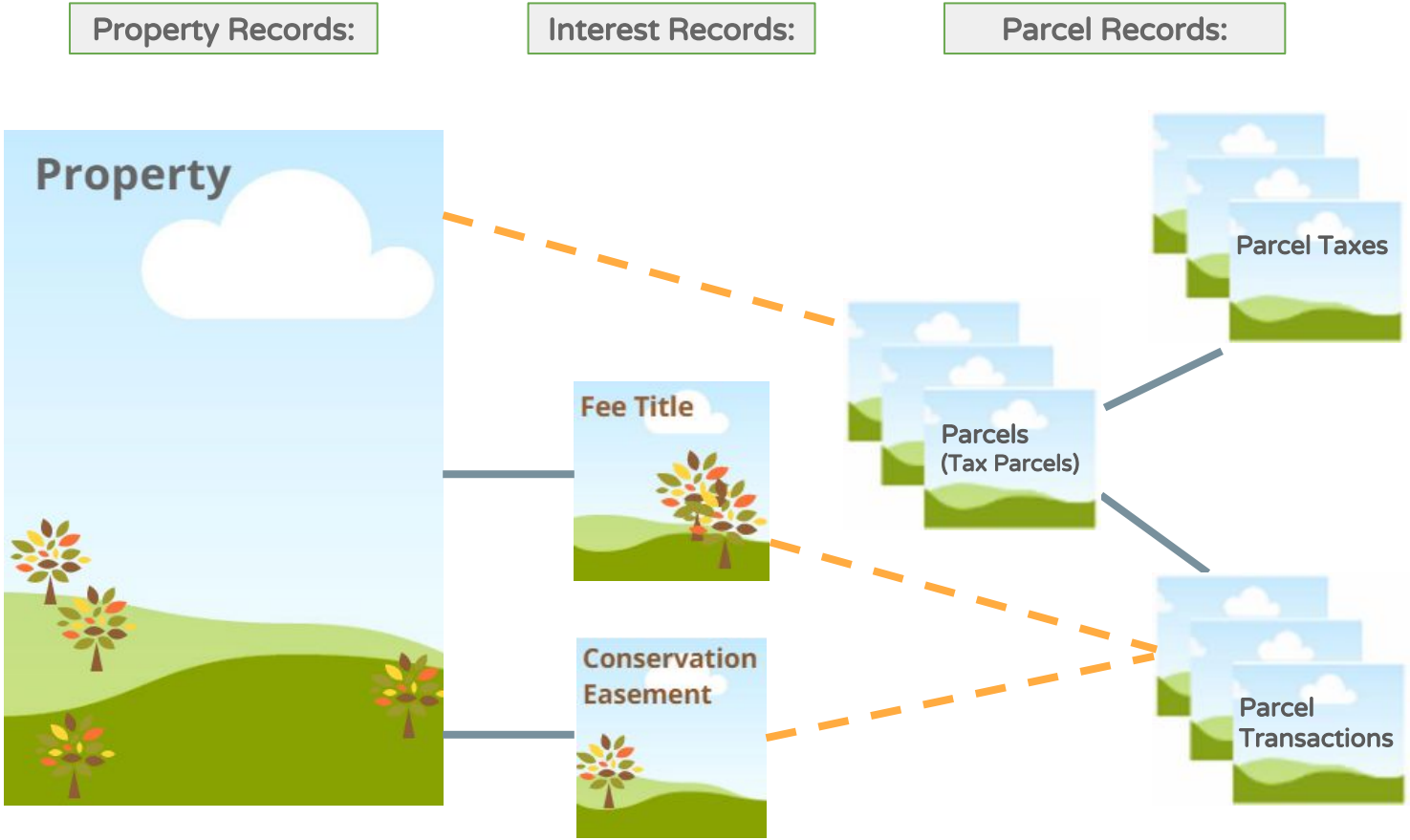
Monitoring Records:



LOCATE

Parcel Objects:

- Parcels
- Parcel Transactions
- Parcel Taxes



LOCATE

Add-Ons Objects

Related Object Records:

Conservation Projects

Reserved Rights

Trails

Use Tracking

Material Assets

Water, Mineral, Other Rights

Key documents

Conservation values

Tasks/Activities

Leases/Tenants

LOCATE

MET
Add-Ons
Objects

Related Object Records:

Conservation Projects

Reserved Rights

Key documents

Tasks/Activities

BackOffice Thinking

Let's take a look!

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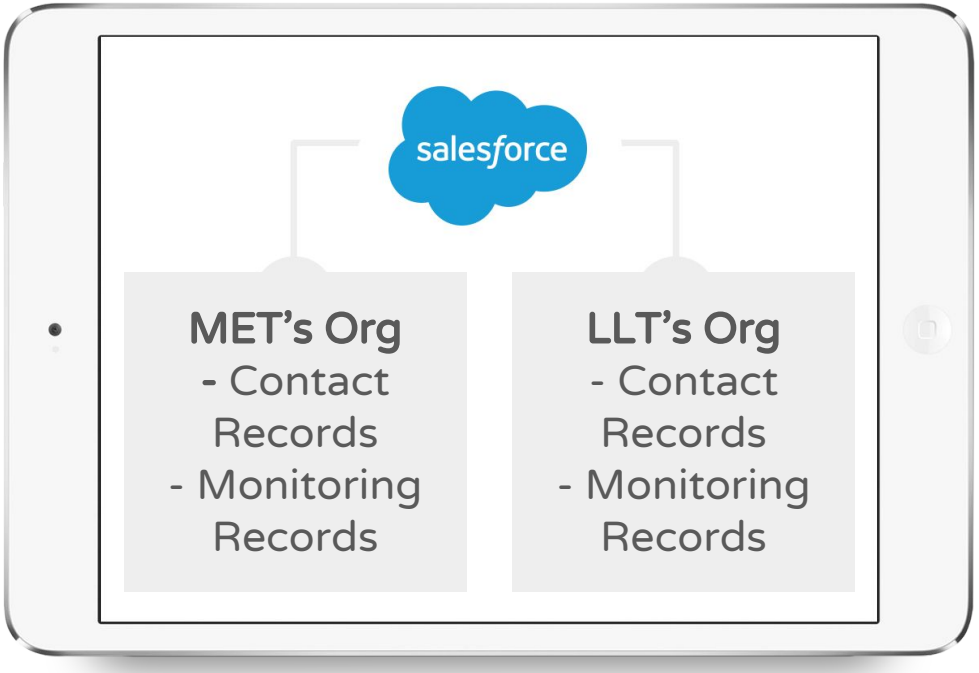
&

Salesforce to Salesforce



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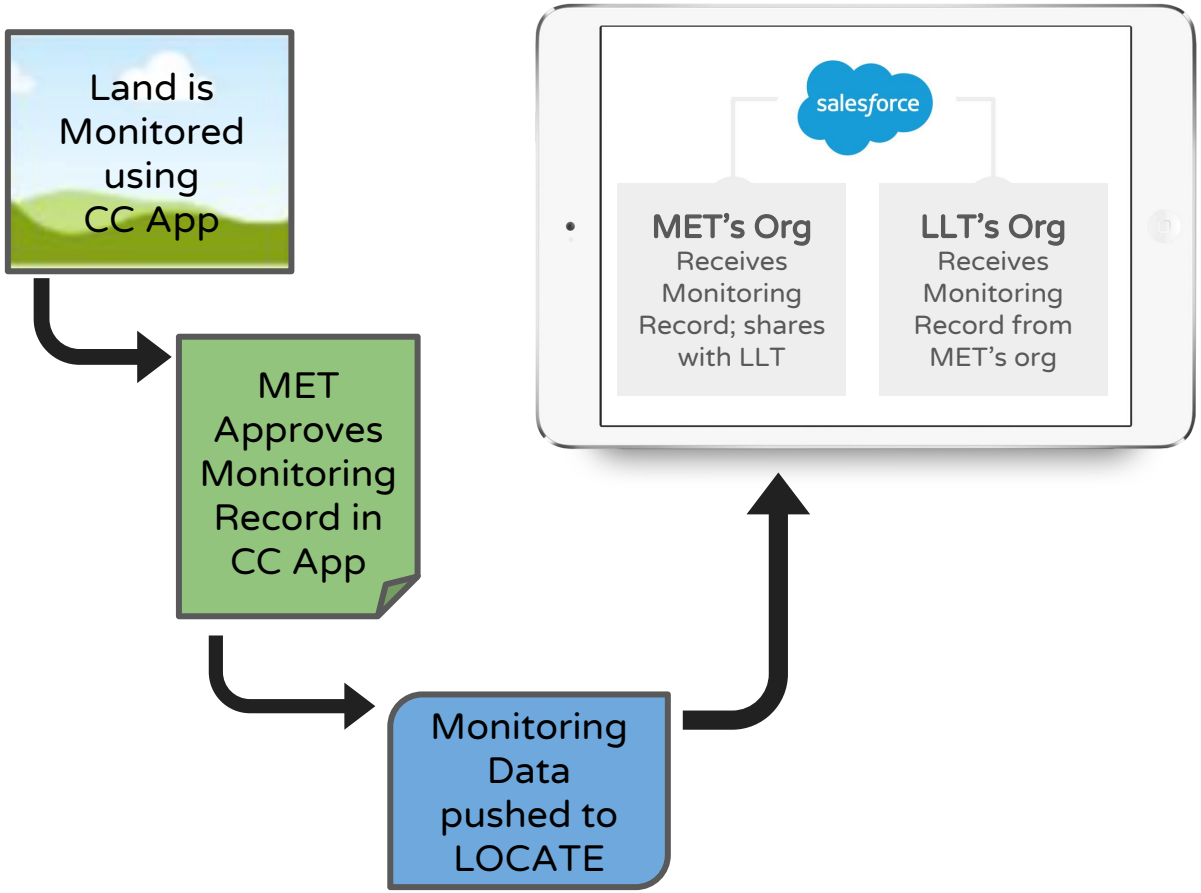
Chesapeake Conservancy App



The Local Land Trust Solution

- **Creating the LOCATE Package for Local Land Trusts**
  - **MET & ESLC**
- **Implementation for Land Trusts**
  - **Workflow > Data > Training**

LOCATE

Support Resources

- MET network
- Salesforce and Nonprofit Success Pack tools
- LOCATE Online User's Group
- LOCATE Monthly Webinars

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Questions?