Getting to know Salesforce

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Using Gmail Aliases for Testing

How to set up gmail email aliases

Salesforce only allows you to use your email address for one UserID and you want to save your business email address for your Salesforce License:

However, you'll want to set up accounts to test your website. Accounts where you pose as:

• A volunteer

• A partner staff

• A volunteer Leader.

If you don't already have one - get a Gmail account for yourself to use for creating 'alias' log-ins which will be needed started with Training lesson 1.

If you already have Gmail - you can skip this. If you don't - get an account at: http://mail.google.com

How to use gmail aliases

Once you have a gmail address you will be able to create 'alias' email addresses that will be sent to your one gmail account.

Example: Let's say your gmail address is bsmith@gmail.com

Once you have this account, you will be able to create unique email addresses for 'identities' you'll want to create when you start training and testing out HandsOn Connect.

To create an alias you just add a plus sign after the first part of your name, and then any letters, numbers. For example:

bsmith+volunteer_test@gmail.com

bsmith+nonprofit1@gmail.com

bsmith+minor_volunteer@gmail.com

Each of these will be treated as a unique email address by salesforce, which will allow you to create multiple salesforce logins.

Save your REAL business address to use as your main administrative login into HandsOn Connect and Salesforce.

When we start the training classes, you'll use your gmail account to create aliases so that you can test your public site from a number of different personas!

Just prepare for training by having a gmail account that you can use!

Trailhead

Trailhead - the best way to learn Salesforce

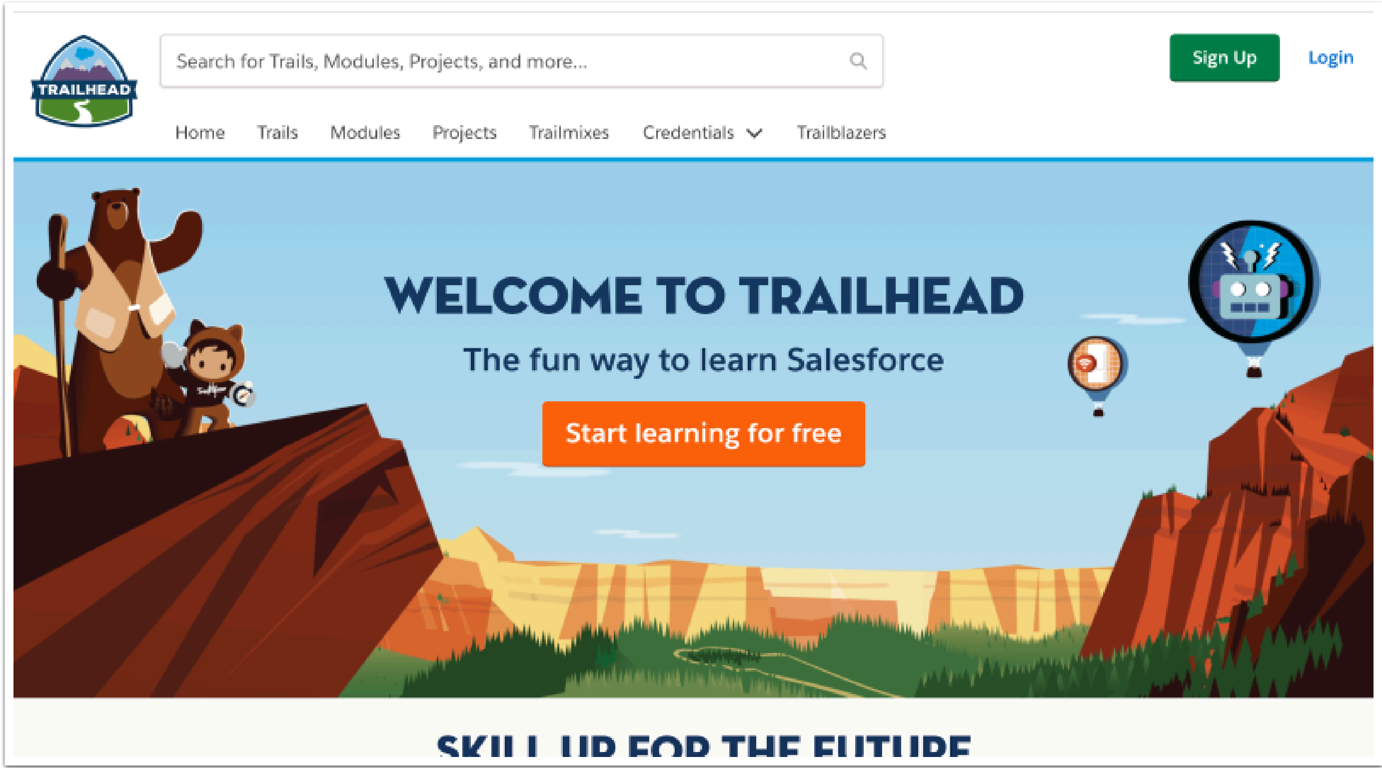
The manuals on the HandsOn Connect help site cover all the ins and outs of using HandsOn Connect, which is a managed application built on the Salesforce Platform. The power of HandsOn Connect comes from its integration with Salesforce.

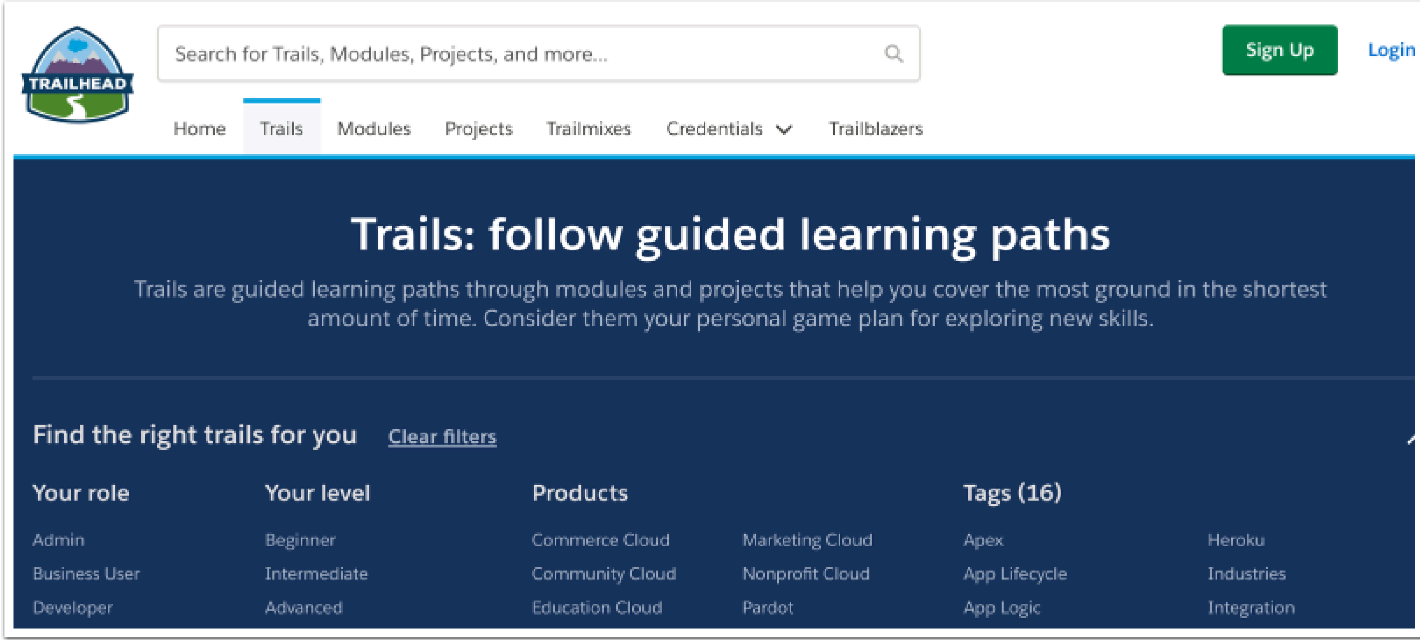
While we cover some Salesforce basics in these manuals (including this one), we can only scratch the surface on how to use all of Salesforce's native functionality. Salesforce has its own help system which can be accessed via the "?" icon in Lightning (on the upper right).

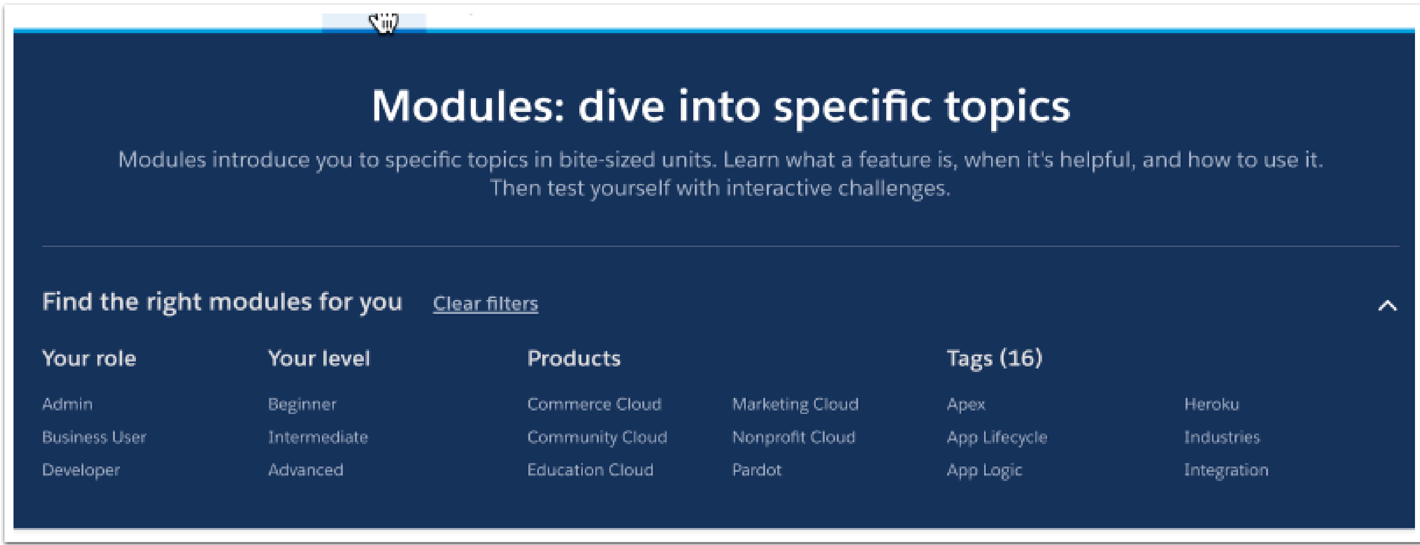
But the best way to learn Salesforce is to use Trailhead -- Salesforce's fun, interactive training site.

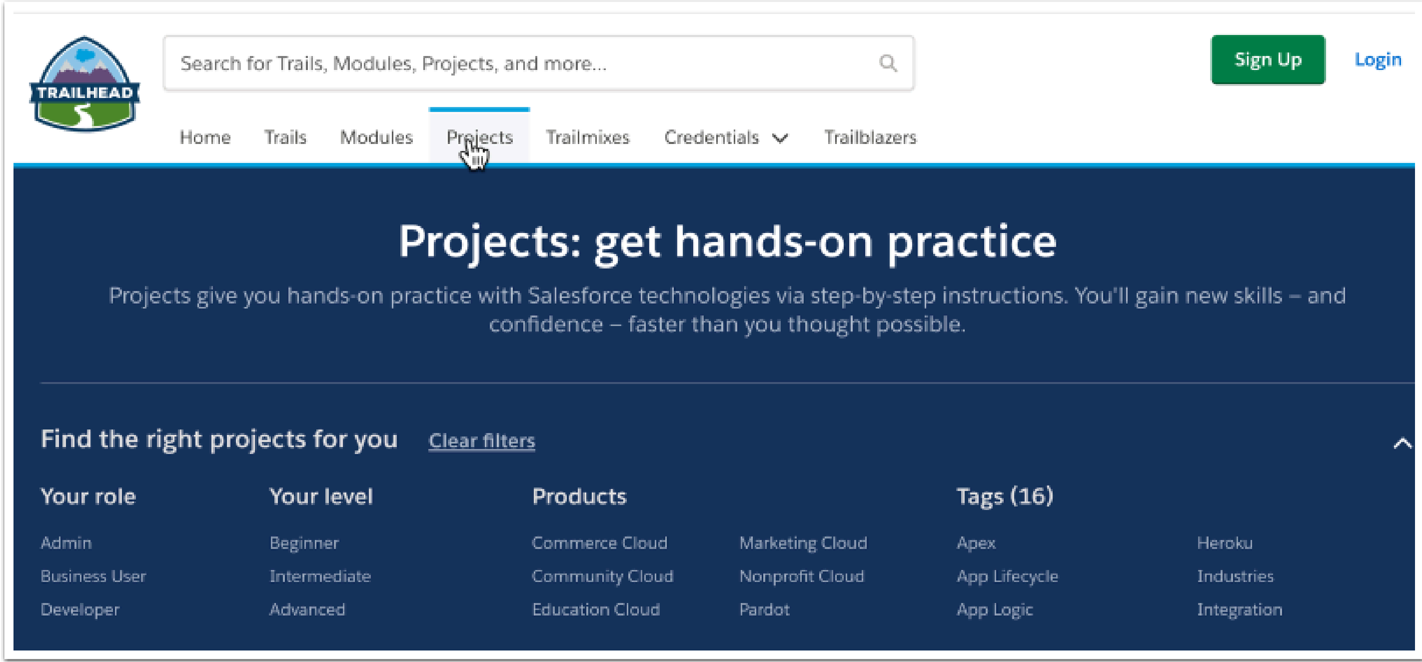
Where do I find Trailhead?

You can access Trailhead at https://trailhead.salesforce.com/   Log in using your Salesforce ID, and you'll be able to learn most anything you can imagine related to Salesforce

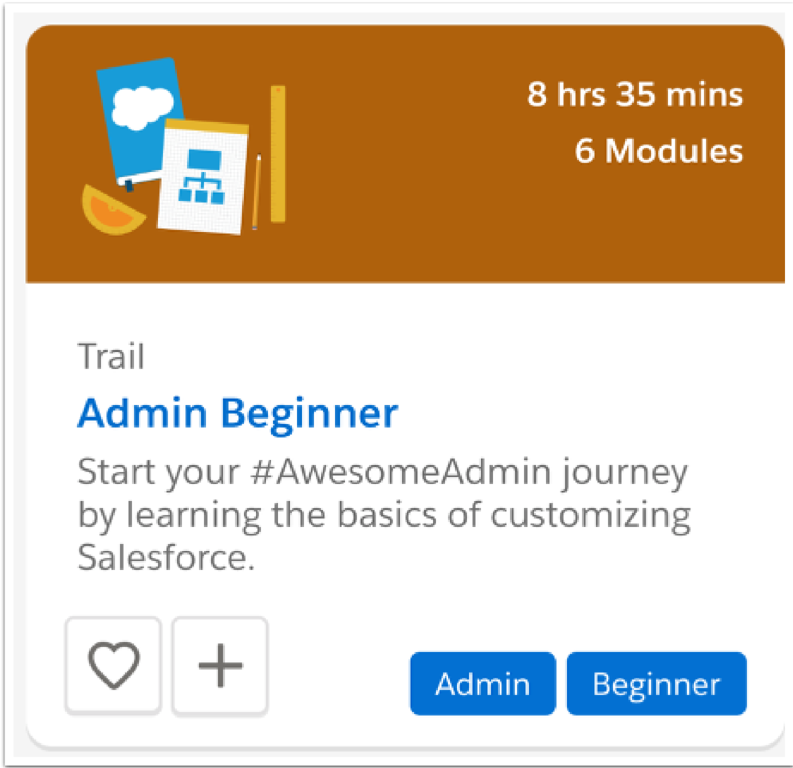



TRAILHEAD
Search for Trails, Modules, Projects, and more...
Sign Up
Login
Home
Trails
Modules
Projects
Trailmixes
Credentials
Trailblazers
Trails: follow guided learning paths
Trails are guided learning paths through modules and projects that help you cover the most ground in the shortest amount of time. Consider them your personal game plan for exploring new skills.
Find the right trails for you
Clear filters
Your role
Admin
Business User
Developer
Your level
Beginner
Intermediate
Advanced
Products
Commerce Cloud
Community Cloud
Education Cloud
Marketing Cloud
Nonprofit Cloud
Pardot
Tags (16)
Apex
App Lifecycle
App Logic
Heroku
Industries
Integration


Modules: dive into specific topics
Modules introduce you to specific topics in bite-sized units. Learn what a feature is, when it's helpful, and how to use it. Then test yourself with interactive challenges.
Find the right modules for you
Clear filters
Your role
Admin
Business User
Developer
Your level
Beginner
Intermediate
Advanced
Products
Commerce Cloud
Community Cloud
Education Cloud
Marketing Cloud
Nonprofit Cloud
Pardot
Tags (16)
Apex
App Lifecycle
App Logic
Heroku
Industries
Integration



Trailhead breaks learning down into 'trails' - which cover a number of modules that lead you through learning anything you want to understand about Salesforce. If you're new to Salesforce, you might start with the Admin Beginner Trail.

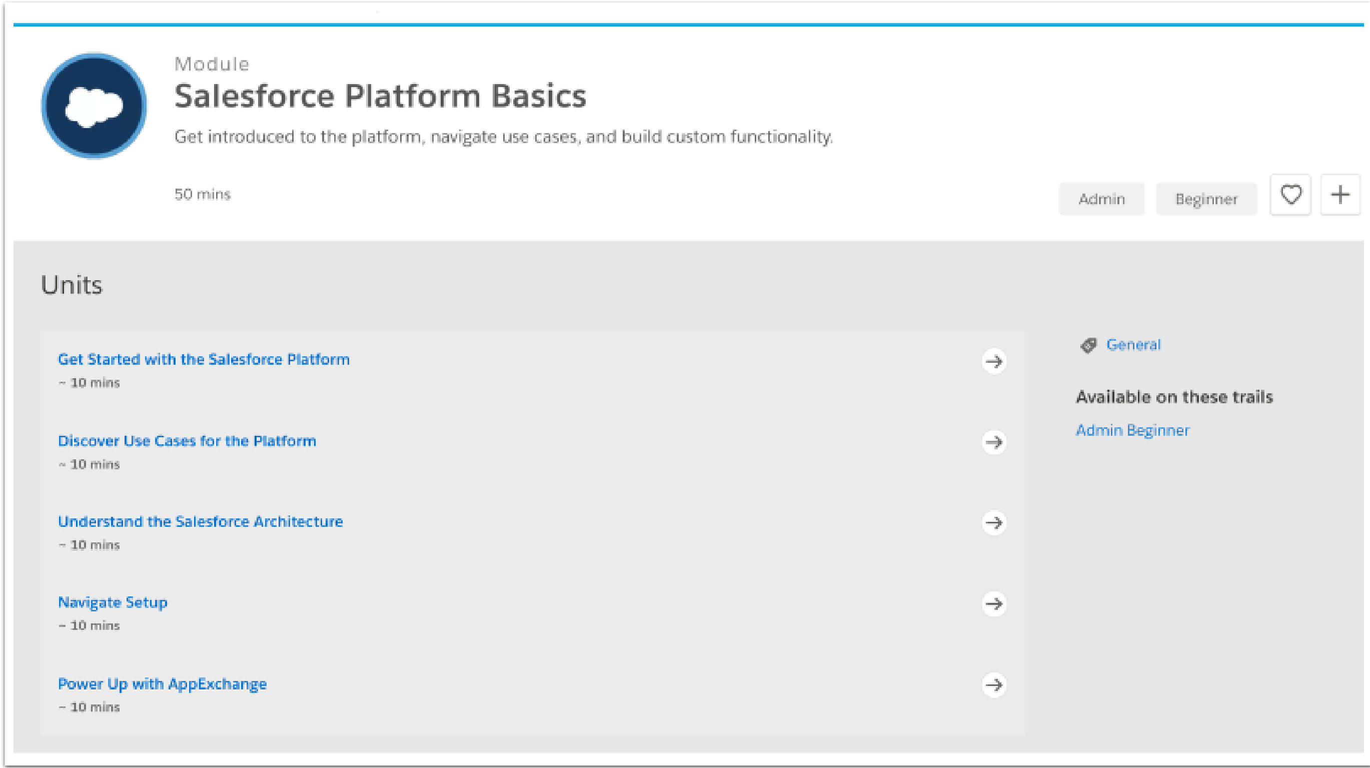


Each "Trail" is broken down into "Modules" that in turn are broken down into individual units (that take from 10 - 30 minutes or so). Completing a module earns you a 'badge' and your progress along the trail and in each module is saved and tracked.

8 hrs and 35 minutes sounds like a huge time commitment -- but if you budget time for two or three thirty minute sessions each week - your Salesforce knowledge will grow and grow!   The lessons are fun - interactive - and end with either a quiz or a hands-on-exercise (which you complete in a free, trailhead playground so as not to clutter up your production instance.   It's learning made fun.

You can also search Trailhead for specific topics - and just pick and use which units or modules you want to pick up skills on!

Here's the first module in the Admin Beginner Trail: Salesforce Platform Basics:



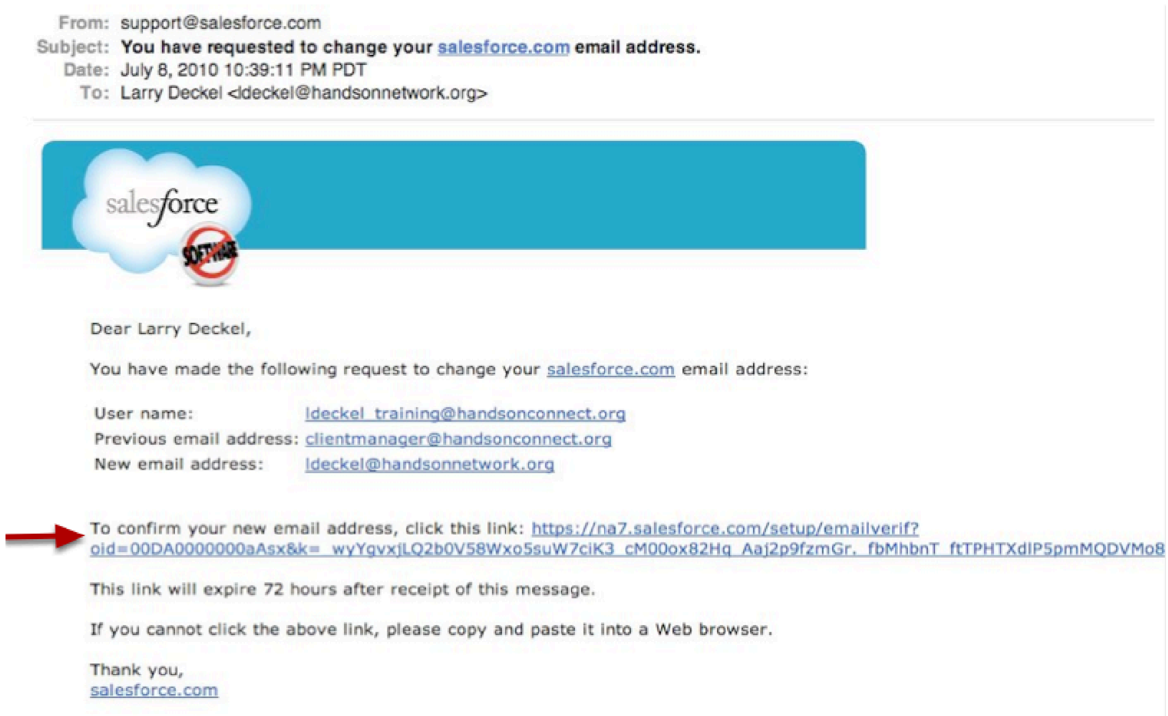
Have fun! And start using Trailhead.

We'll provide occasional links to relevant trails in our HandsOn Connect documentation!

Accessing your Salesforce Account

Getting Started: Accessing your Salesforce Account

First, we'll give your system administrator access to your Salesforce Account. The Sys Admin will get an email notification:



From: support@salesforce.com
Subject: **You have requested to change your salesforce.com email address.**
Date: July 8, 2010 10:39:11 PM PDT
To: Larry Deckel <ldeckel@handsonnetwork.org>

Dear Larry Deckel,

You have made the following request to change your salesforce.com email address:

User name: ldeckel_training@handsonconnect.org
Previous email address: clientmanager@handsonconnect.org
New email address: ldeckel@handsonnetwork.org

To confirm your new email address, click this link: https://na7.salesforce.com/setup/emailverif?oid=00DA0000000aAsx&k=_wyYgvxjLQ2b0V58Wxo5suW7ciK3_cM00ox82Hq_Aaj2p9fzmGr._fbMhbnT_ftTPHTXdlP5pmMQDVMo8

This link will expire 72 hours after receipt of this message.

If you cannot click the above link, please copy and paste it into a Web browser.

Thank you,
salesforce.com

The Salesforce instance that we've set up for your organization had a default System Administrator. We will be changing that default system administrator account over to YOUR system administrator by resetting the name of that user and the email address of that user. The system administrator will receive an email notifying them that "You have requested to change your salesforce.com email address"

Click on the link to confirm this change.

You'll also get a notice that your password has been reset. You'll get a new temporary password, and a link to set your NEW password.

Dear Babe Ruth,

Your Salesforce CRM password has been reset by your administrator. Your user name and temporary password are below:

User name: bruth@handsonanywhere.org
Temporary password: 4soV6

Note that your user name is in the form of your email address and passwords are case sensitive.

To log in automatically with your temporary password, click https://login.salesforce.com/?un=bruth%40handsonanywhere.org&pw=4soV6

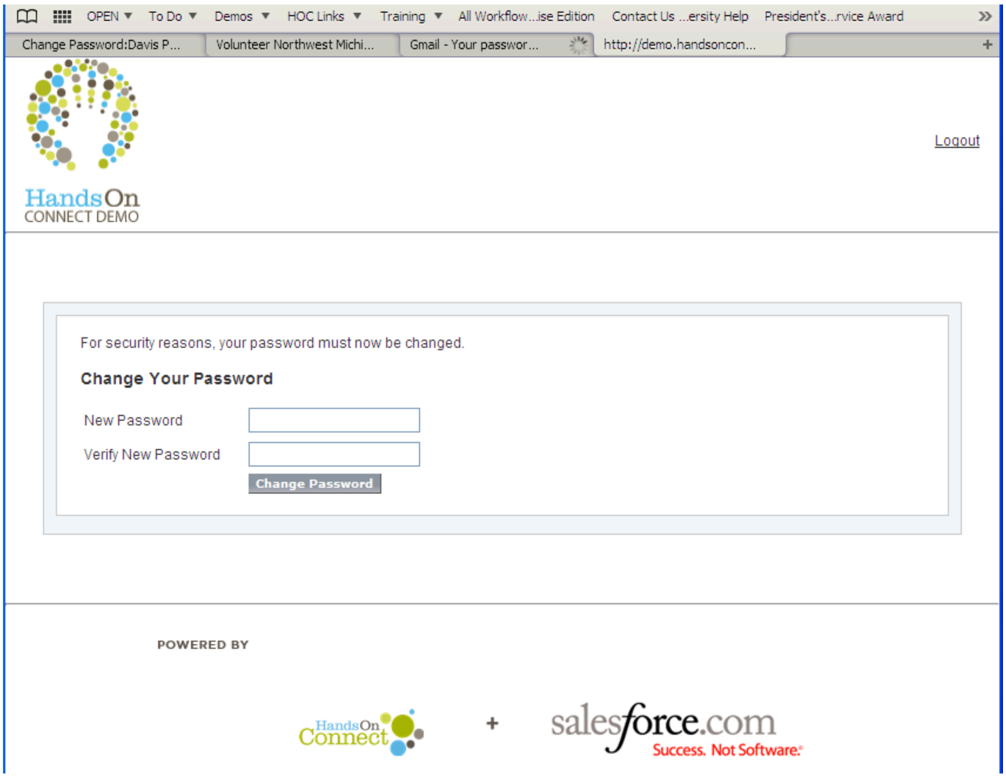
If you have problems with the above link, please go to https://login.salesforce.com/ and manually enter your user name.

If you have any questions, please contact your administrator: jrobinson@handsonanywhere.org.

Thank you,
salesforce.com

Your Username is going to be your email address. After you log-in with your temporary password, you will be prompted to create a new password. Salesforce prefers secure passwords with mix of letters and alpha characters, and a CAP character. (Other users we have already set up in the system will also get email reset notices like this. This will include your Partner Approval Manager, Opportunity Approval Manager and Volunteer Leader Approval Manager.

Change Your Password Screen



The System Administrator will add the remaining users to the system, and send out welcoming emails to the rest of your internal staff.

From: support@salesforce.com
Subject: Salesforce.com password confirmation
Date: June 18, 2011 8:46:59 AM PDT
To: troutco+sample@gmail.com

Your Login Is Enclosed.

Dear New User Sample,

Welcome to Salesforce! Your user name and temporary password are below:

User Name: troutco+sample@gmail.com
Password: Set the first time you login

Log in automatically by clicking https://login.salesforce.com/?c=l14m45QmiHK6sJE5DlgSQgqcDDospRUAKKit2yMJQHpJIkoGXhQMzqrfet15OVp16pR3TLDcx1uQ%3D%3D

If you experience problems with the above link, please contact your salesforce.com administrator for assistance.

You'll be asked to choose a password when you first log in. Note that passwords are case sensitive.
Make sure to choose a password question and answer that you will easily remember since you will use this information in the future should you forget your password.
Any administrator in your organization can reset your password. Please keep this email for future reference should you have any password problems.

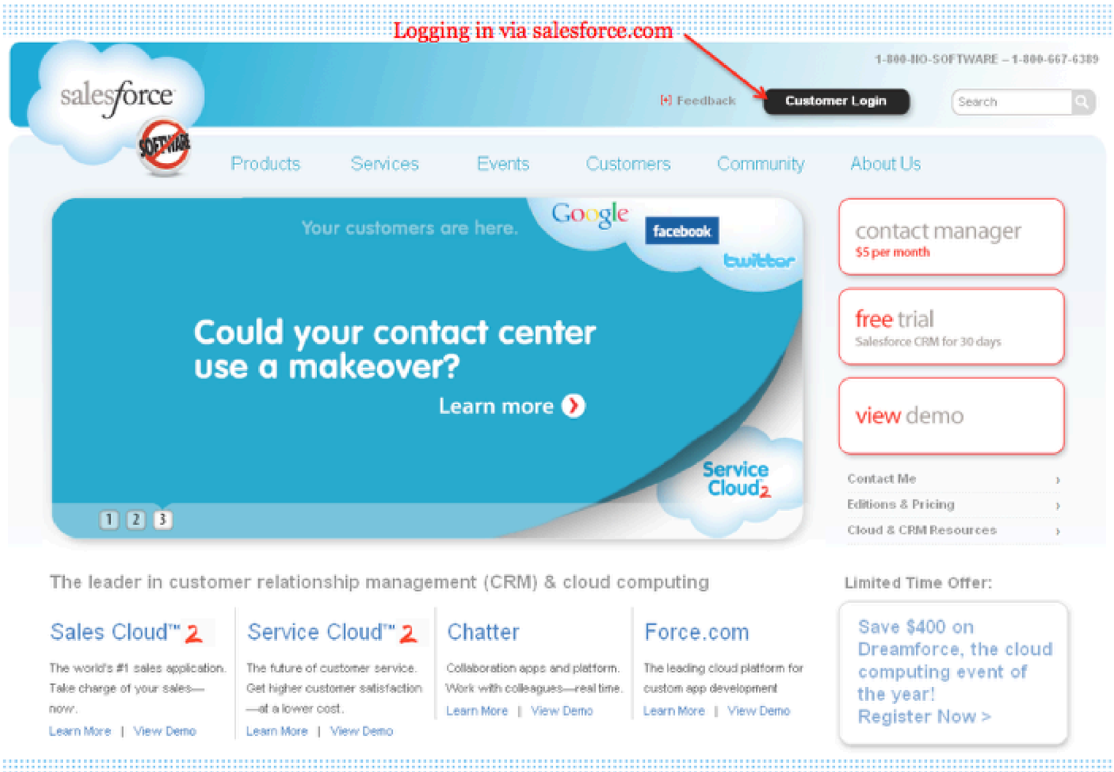
Once again, welcome to Salesforce.

salesforce.com
The Landmark @ One Market, Suite 300
San Francisco, CA 94105
Phone: (415) 901-7000
Fax: (415) 901-7040
http://www.salesforce.com/us/

You can have nine active licensed users in your system. (1 of your ten licenses will be named 'client administrator" and that account is used by HandsOn Connect staff to administer and maintain your account.)

When you access your account for the first time, you'll be asked to set up a security "challenge question"

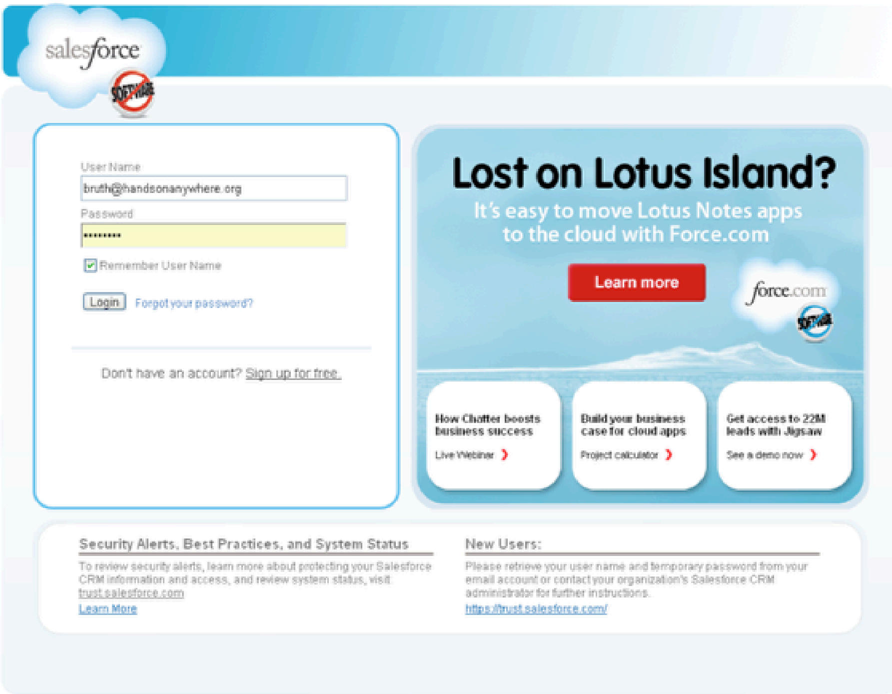
After you have created your account you can Login at Salesforce.com at any time by clickiing on the Customer Login Button



Logging in is how you will access your adminstrative / staff access to HandsOn Connect.

It's easier to just bookmark http://login.salesforce.com which takes you directly to the login screen.

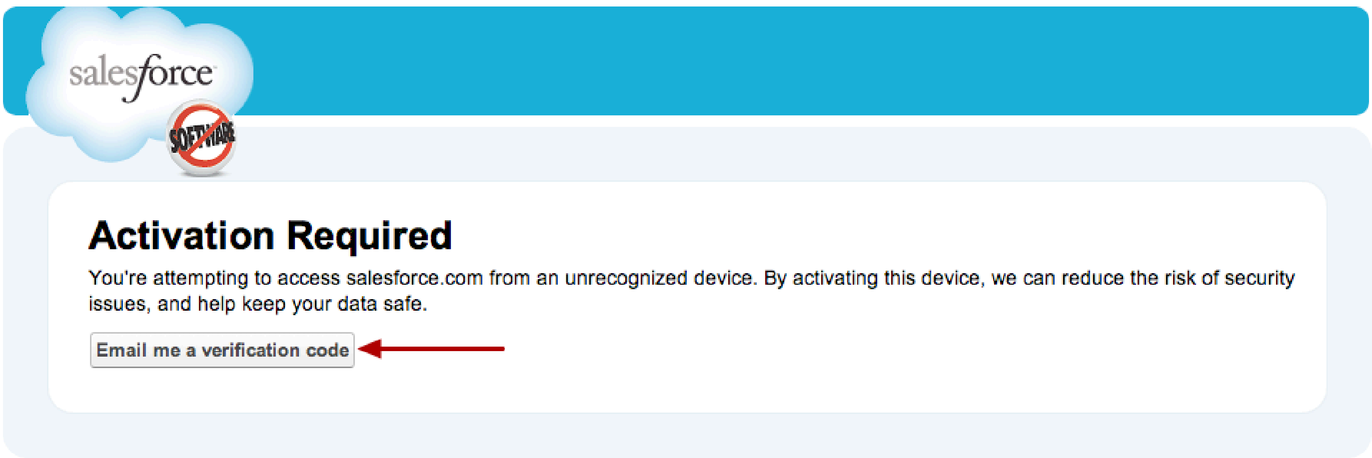
Logging in from login.salesforce.com



Your user ID is your email address.

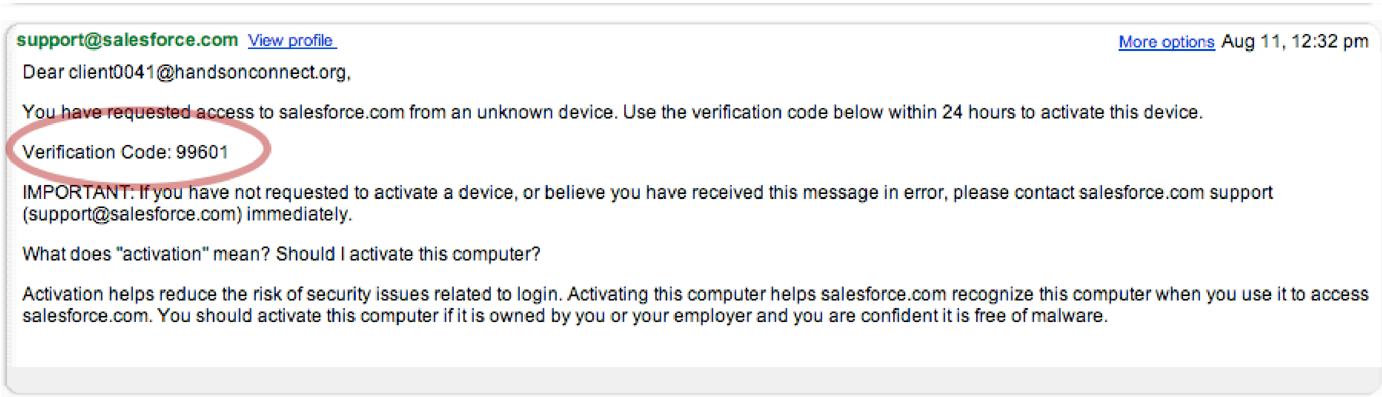
The password is the one you selected

You may have to activate your computer if no one at your ip address has set-up an account yet!



Any time you login to your account from a new ip address, you'll have to activate your account access once again. Salesforce keeps track of the safe and approved IP addresses you've authorized for your account. If you use a laptop at home or for travelling, you'll run into this screen from time to time.

Click on Email me a verificaiton code: and you'll be sent an email with a code:


support@salesforce.com View profile More options Aug 11, 12:32 pm

Dear client0041@handsonconnect.org,

You have requested access to salesforce.com from an unknown device. Use the verification code below within 24 hours to activate this device.

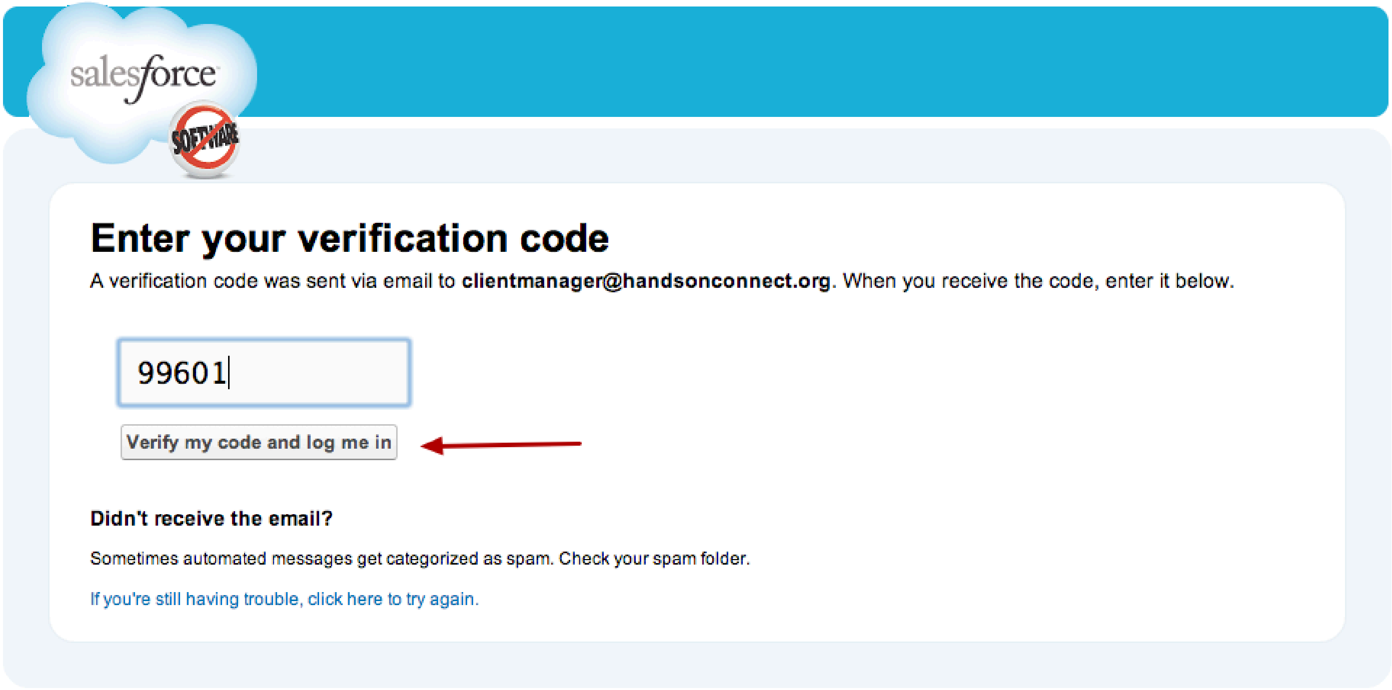
Verification Code: 99601

IMPORTANT: If you have not requested to activate a device, or believe you have received this message in error, please contact salesforce.com support (support@salesforce.com) immediately.

What does "activation" mean? Should I activate this computer?

Activation helps reduce the risk of security issues related to login. Activating this computer helps salesforce.com recognize this computer when you use it to access salesforce.com. You should activate this computer if it is owned by you or your employer and you are confident it is free of malware.

Enter the verification code into the screen in your browser - and your log-in will complete!



Adding Users

Adding Your Staff as Users to Salesforce

Each member of your internal staff needs a SalesForce license to access and use the system.

Most people in your organization should be set-up in the staff role. Depending on your organization, you may choose to have additional administrative users. The System Administration role is necessary to:

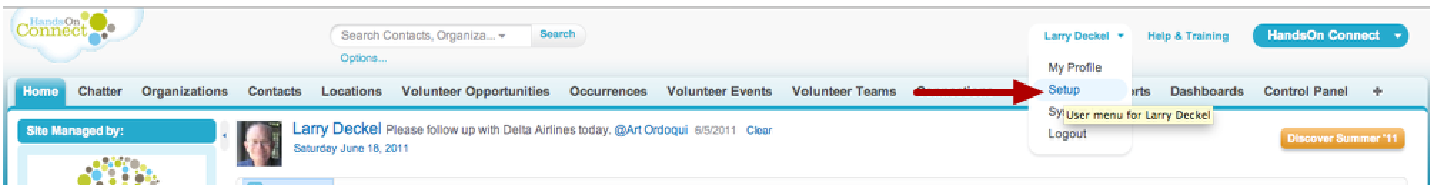
- Add additional users
- Customize functionality and workflows of HandsOn Connect and Salesforce
- Add custom objects, custom fields, and change page layouts.

***Note**: We recommend limiting System Administrator access to people who absolutely must have direct access to this functionality. System admins should be fully trained in Salesforce and HandsOn Connect administration to avoid accidentally harming your system. Give "staff" access to all others. When staff needs something changed that is outside their 'role' access -- they should see their system administrator to request those changes.*

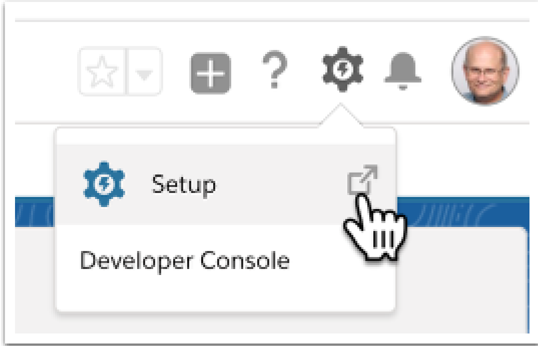
Note: By default - only System Administrators have access to the CMS and the ability to customize and modify the public site. However, Staff users CAN be granted special access to the CMS. If you have a staff user who needs access to the CMS, open a support ticket and we can grant CMS access to staff users.

***Note:** Are you adding a new user because you are deactivating an existing user and turning over their responsibilities to the new user? If so - consult the advanced system administrator guide for the appropriate posts on* How to Update or Change internal and Partner Staff.

How to add licensed salesforce users:

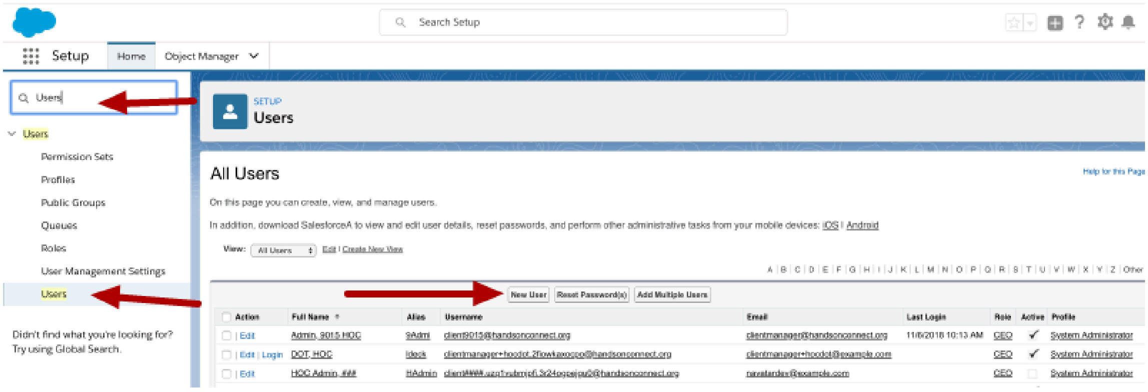


In Salesforce lightning the setup menu is found here:



Use the Quick Find box to search for "Users"

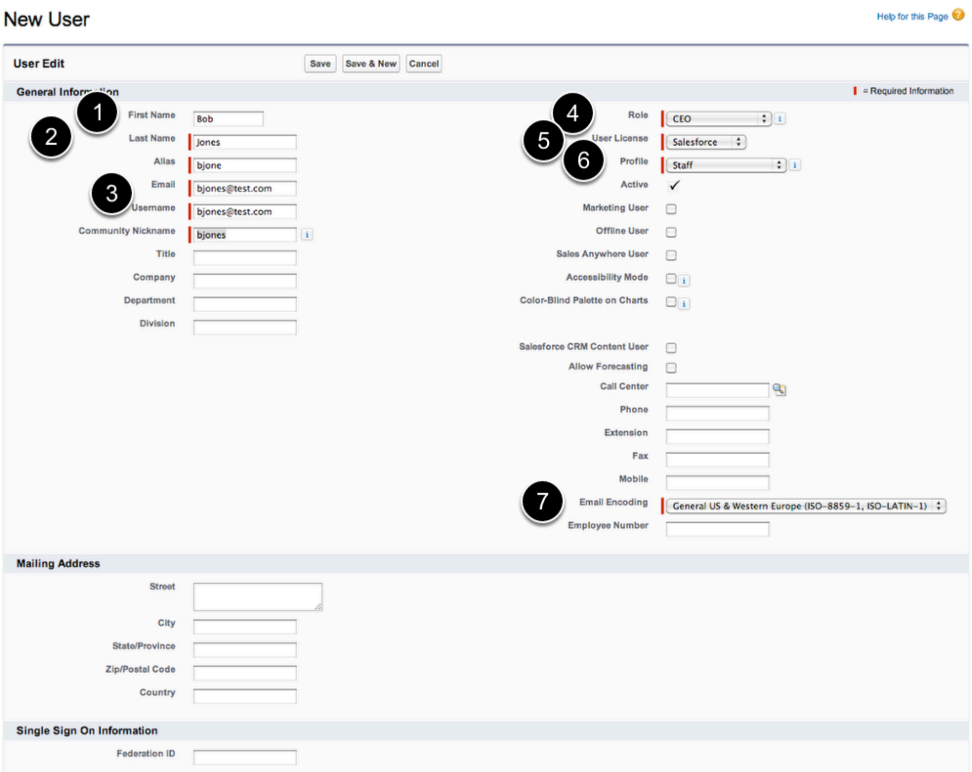
Then Select "Users", and click on New User.



Clicking on users will show a view of some of the users in your system. (You can create new views if you want to see certain groups of users).

In this case, we want to add a New User so click on the **New User** button.

Complete the following fields in the new user record and save.



The following fields must be filled in:

1. First Name:

2. Last Name:

(Alias, Username, and Community Nickname will automatically be filled in for you).

3. Email and Username: These should be the same and must be in the form of a valid email address.

4. Role: select CEO (roles are not part of HandsOn Connect, and so they do not matter, just select the top of this hierarchy)

(note: you will not be able to select this picklist until AFTER you set the User License type)

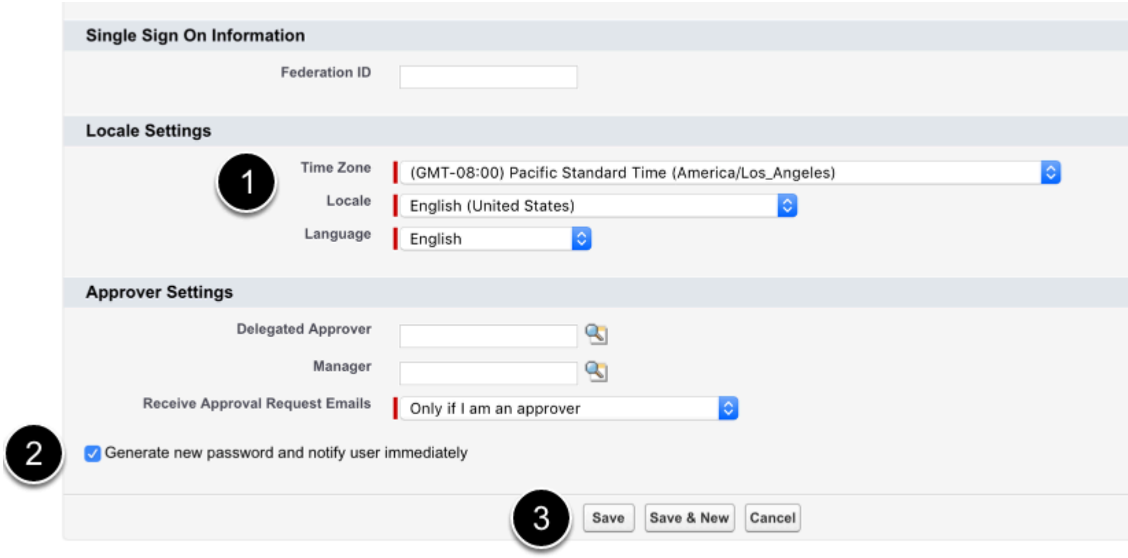
5. User License = Salesforce

6. Profile = (either System Administrator or Staff)

7. Leave the Email encoding to its default setting "General US & Western Europe)

You can optionally fill in the phone and mailing info if desired. It is not required here and you'll usually use this persons contact record in the system for keeping track of that information as its easier to access.

If you are using Salesforce Platform licenses instead of full Salesforce Licenses, you'll be given the name of the additional profile that's been set up for your platform license users.



1. Check to make sure the correct time zone is selected for the user. All of your users should be set to use the same time zone (the time zone you'll use for all your volunteer opportunities)

2. Check the "Generate new Password and notify user immediately button.

3. Click the Save button

An email will be sent to the email address you specified, letting them know an account has been created, and giving them a temporary log-in password which they will update when they activate their account.

Repeat this for up to nine people on your staff who will be using the administrative end of Salesforce for training and beyond.

Note: This is for your staff only. NOT for your partner organizations or volunteer leaders. Access for them will be discussed in a later training.

The Salesforce Interface

The Salesforce Interface

The Best way to Get Familiar with Salesforce is by reading the basics in Trailhead.

Salesforce comes in two flavors:

Salesforce Classic -- the older version of Salesforce still used by many long-time HandsOn Connect customers.

Salesforce Lightning - the modern interface for Salesforce, which is automatically setup for new Salesforce users. Classic Salesforce users are being increasingly 'urged' by Salesforce to switch over and start using the Lightning interface.

Learn the basics of Salesforce Navigation

In the App Selector in Salesforce Lightning you'll select the app "HOC Lightning".   It has all the objects (tabs) used by handsOn Connect, a HOC home page, and all the necessary 'quick actions' for using HandsOn Connect.

To learn about getting around in Salesforce Lightning - please read this article from Trailhead:

Search for data in Salesforce

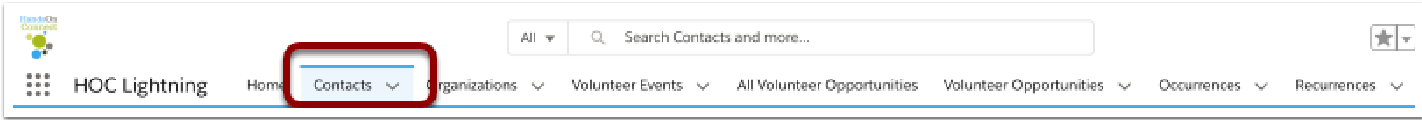
Salesforce has high-powered search capability that enables you to find any records in its database.

Click here to learn more about Salesforce's Global Search Capabilities in Trailhead.

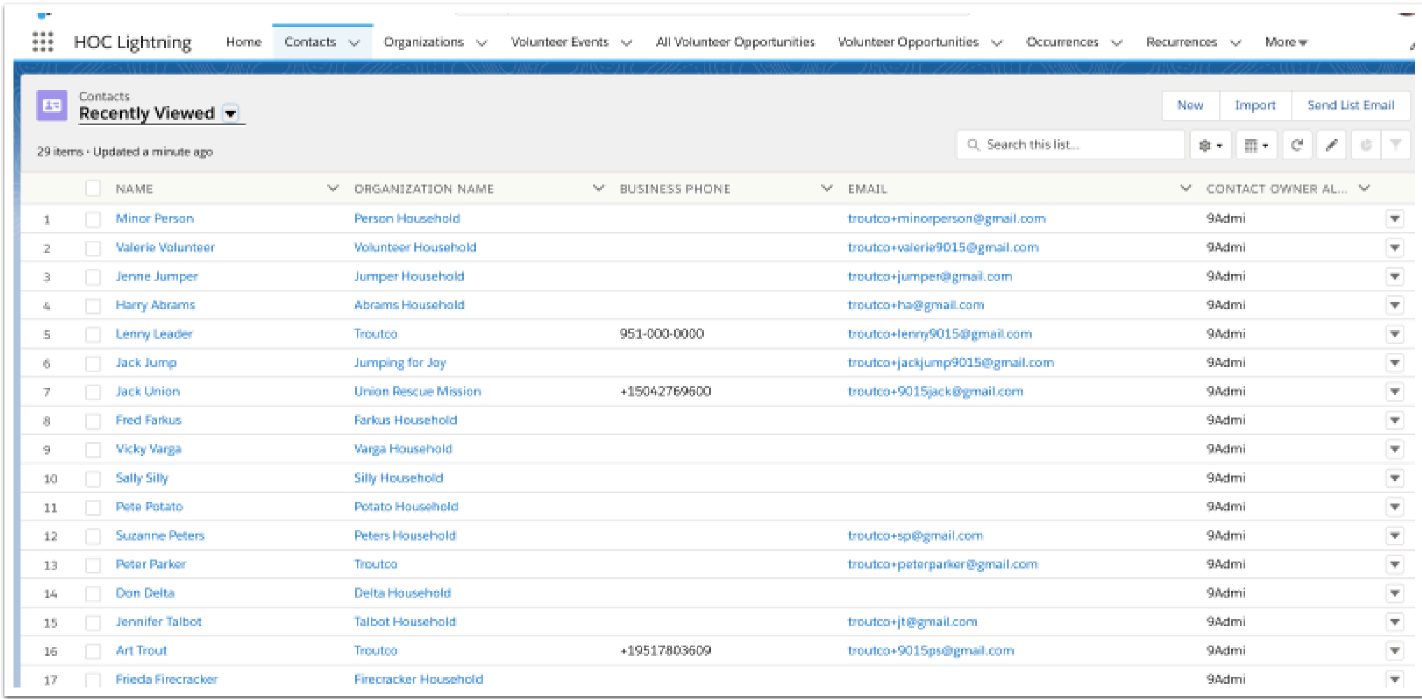
Working with Objects (Records)

Object Home Pages

Salesforce is made up of different object types. Each object has its own tab in the navigation



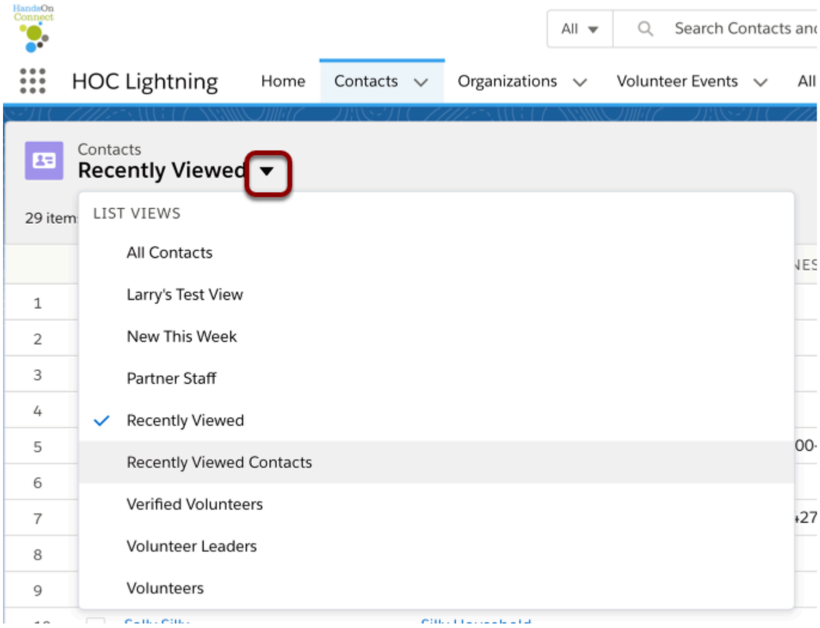
When you first click on an object (tab), you see its "Home" page



You'll initially always see the view "Recently Viewed" which shows you the records you've most recently looked at.

You can click on the down arrow to the right of the recently viewed view - to access other 'views' of records:

Some sample views



For example. Here we have defined some sample views like "Volunteer Leaders"" "New This Week" and "Verified Volunteers"

Click here for information on editing or creating new views.

Understanding Salesforce Record Layouts

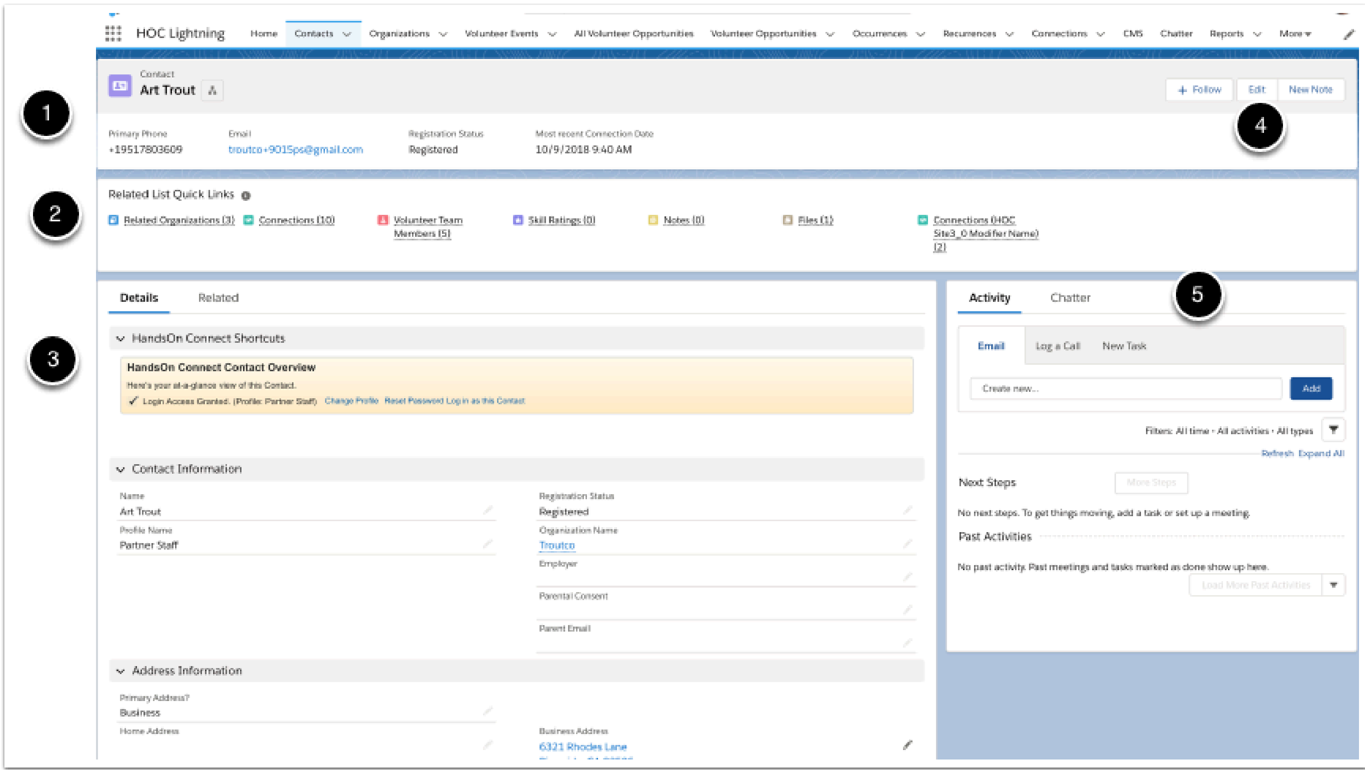
Within each object type (tab) there are individual salesforce records with fields of data for one record of that type. (For example: one organization).

In Salesforde Classic, The page Layout is made up of several sections:

- Chatter about the record
- Record Detail
- Lists of other objects with a relationship to this record.

Salesforce Detail Page Layout (SF Lightning)

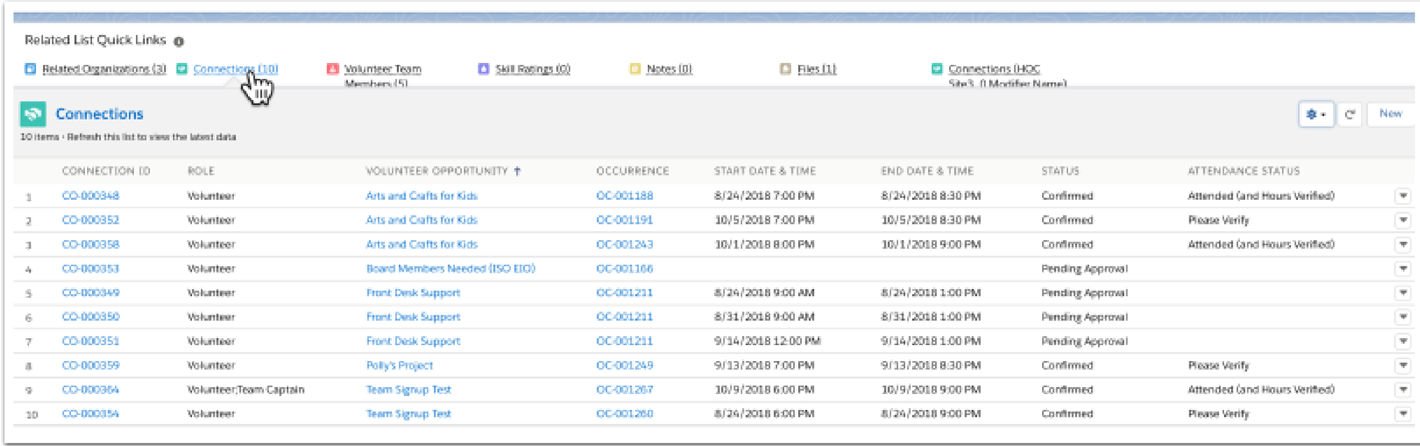
The Lightning Page Layout can be customized by your system administrator in a number of ways (by adding or removing various lightning components), But here is what you might generally see:



1. Highlights Panel -- an at a glance view of the most important fields in the record.

2. Related List Quick Links -- all the related objects that have a relationship to this record are listed, as well as the number of related records. So for example, we an see this contact, Art Trout has 10 Connection records. Hovering over a quick link will expand it showing some of

those records. You can then click on any of the related records and go directly to that record. The drop down triangle to the right gives you the option to edit the related record.



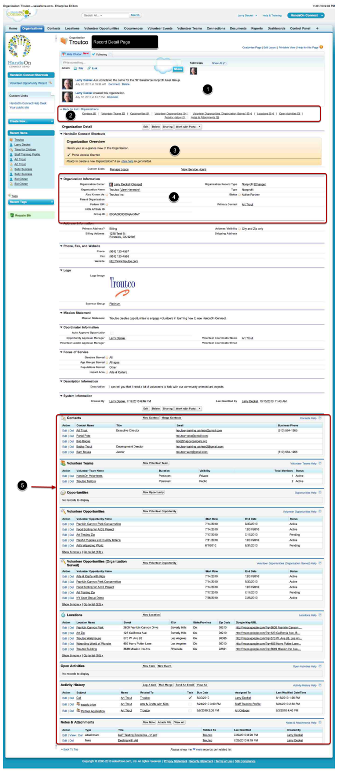
	CONNECTION ID	ROLE	VOLUNTEER OPPORTUNITY	OCCURRENCE	START DATE & TIME	END DATE & TIME	STATUS	ATTENDANCE STATUS
1	CO-000348	Volunteer	Arts and Crafts for Kids	OC-001188	8/24/2018 7:00 PM	8/24/2018 8:30 PM	Confirmed	Attended (and Hours Verified)
2	CO-000352	Volunteer	Arts and Crafts for Kids	OC-001191	10/5/2018 7:00 PM	10/5/2018 8:30 PM	Confirmed	Please Verify
3	CO-000358	Volunteer	Arts and Crafts for Kids	OC-001243	10/1/2018 8:00 PM	10/1/2018 9:00 PM	Confirmed	Attended (and Hours Verified)
4	CO-000353	Volunteer	Board Members Needed (ISO EIO)	OC-001166			Pending Approval	
5	CO-000349	Volunteer	Front Desk Support	OC-001211	8/24/2018 9:00 AM	8/24/2018 1:00 PM	Pending Approval	
6	CO-000350	Volunteer	Front Desk Support	OC-001211	8/31/2018 9:00 AM	8/31/2018 1:00 PM	Pending Approval	
7	CO-000351	Volunteer	Front Desk Support	OC-001211	9/14/2018 12:00 PM	9/14/2018 1:00 PM	Pending Approval	
8	CO-000359	Volunteer	Polly's Project	OC-001249	9/13/2018 7:00 PM	9/13/2018 8:30 PM	Confirmed	Please Verify
9	CO-000364	Volunteer;Team Captain	Team Signup Test	OC-001267	10/9/2018 6:00 PM	10/9/2018 9:00 PM	Confirmed	Attended (and Hours Verified)
10	CO-000354	Volunteer	Team Signup Test	OC-001260	8/24/2018 6:00 PM	8/24/2018 9:00 PM	Confirmed	Please Verify

3. The main page layout for the record. This is made up of sections, and fields. Each field can be edited and updated (unless its a read-only field). Fields with a pencil icon can be double clicked on and edited inline. Or if you want to edit the entire record (multiple fields), click on the Edit button (4).

5. Lightning components. In this case, we have a 'page' component which has two tabs.   Thew Activity Tab allows you to email this record, log a call, or create a task. The Chatter Tab allows you to use Salesforce's chatter feature to share information about the record socially throughout your organization. (You can subscribe to chatter feeds!)

[See this Trailhead module for information on using Salesforce Chatter in Lightning.]

Salesforce Detail Page Layout (SF Classic)



A record detail page has two sections:

Record Header - is where the fields for this record are laid out.   It is available in both DETAIL view and EDIT view. Inline editing is available for these fields.

Related Lists - are detail view only with hyperlinks. You must go to a related object before you can edit it. There is no inline editing.

1. Chatter about this record: - You can choose to hide this.

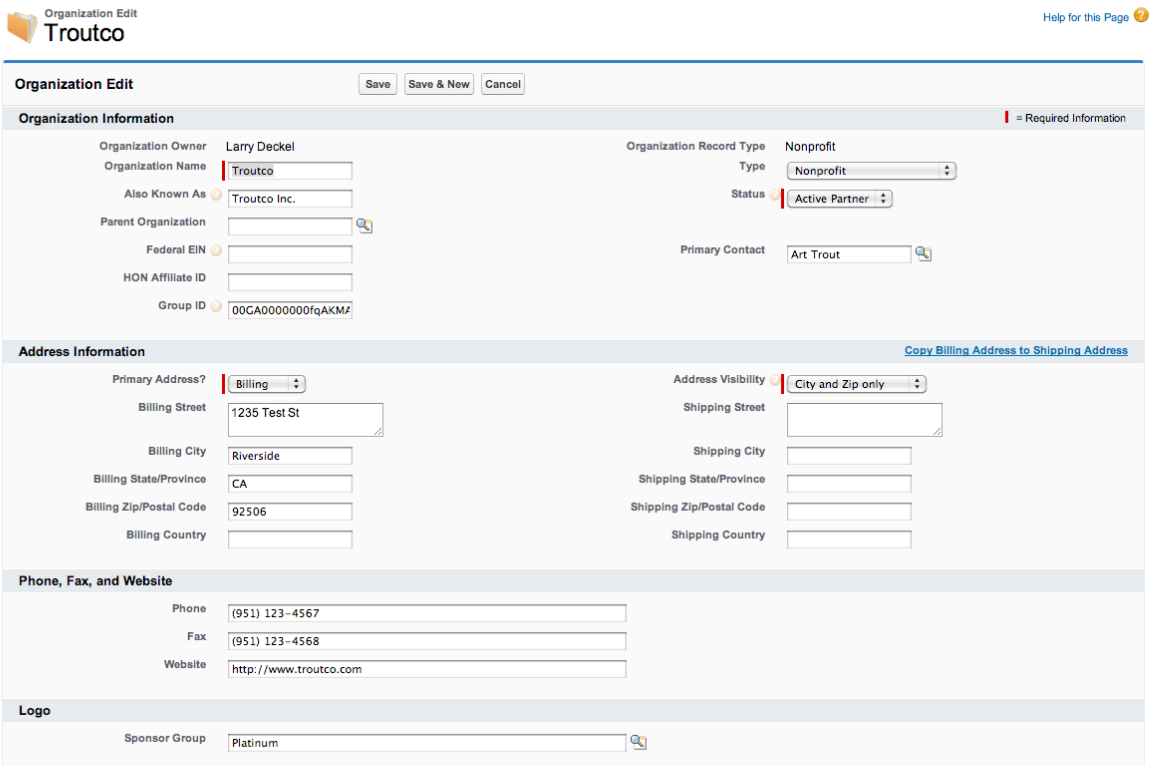
2. Related Lists - (with hoverlinks)

3. HandsOn Connect Dashboard -- custom 'at a glance' information associated with many HandsOn Connect objects

4. Section - the record header is broken into individual sections, to group fields in a useful way. Each field has a label identifying it, and then the data itself. Double clicking on a field name will allow you to edit it inline.

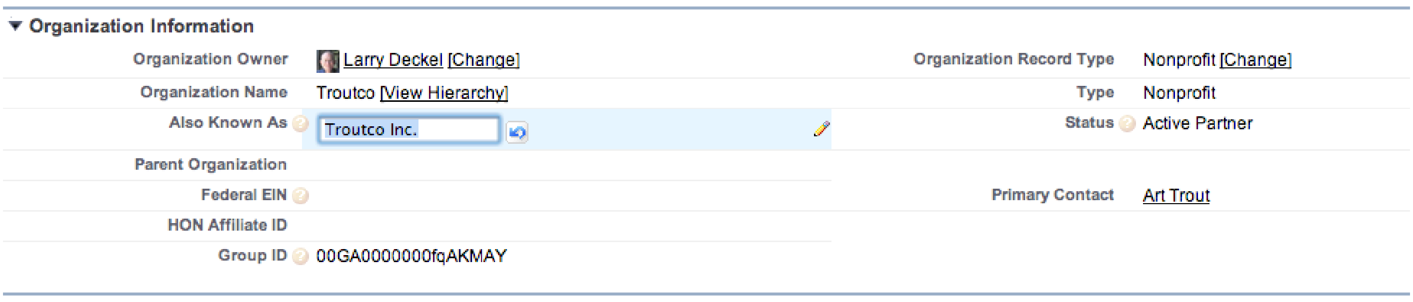
5. Related Lists - a handy view of objects that are related to this record, with hyperlinks to go to those records.

There are two ways to edit fields



In EDIT mode - you have access to edit all the fields at once

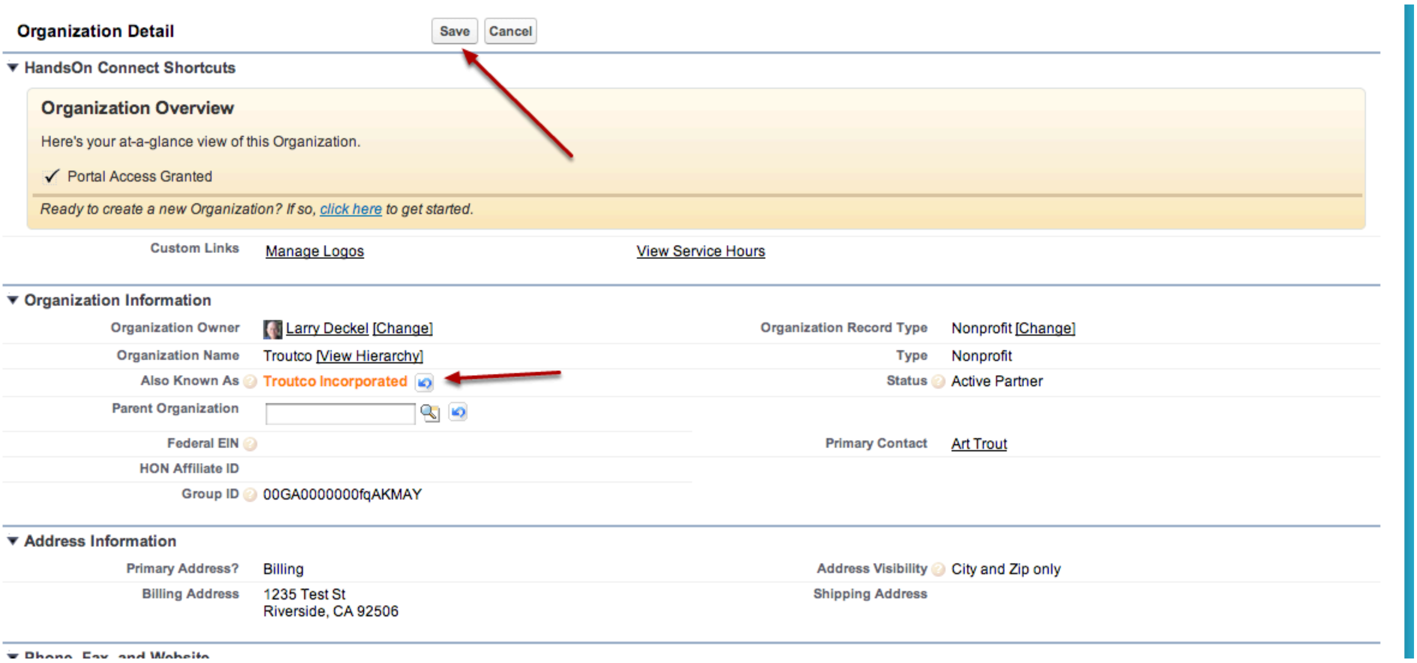
Inline Editing



By double clicking on an individual field, the pencil icon will appear, and you can can edit one field at a time. You can click the looping arrow to UNDO.

Fields that are locked against editing will have a padlock next to them.

Inline edits are not saved until you hit the SAVE button for the record

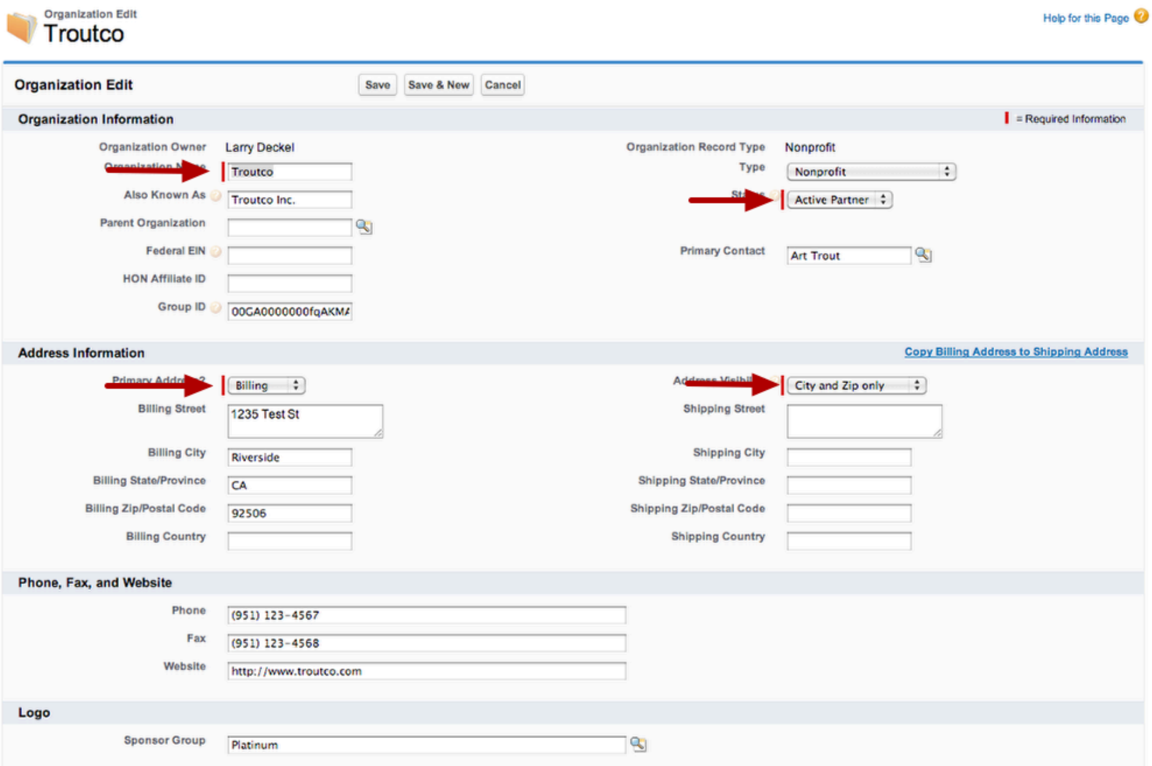


Changes made by inline editing appear in orange. They are not saved until you hit the SAVE button to save the record.

Working with Fields in Records

Salesforce has many different types of fields, many of which are identified by symbols or markings.

Required Fields

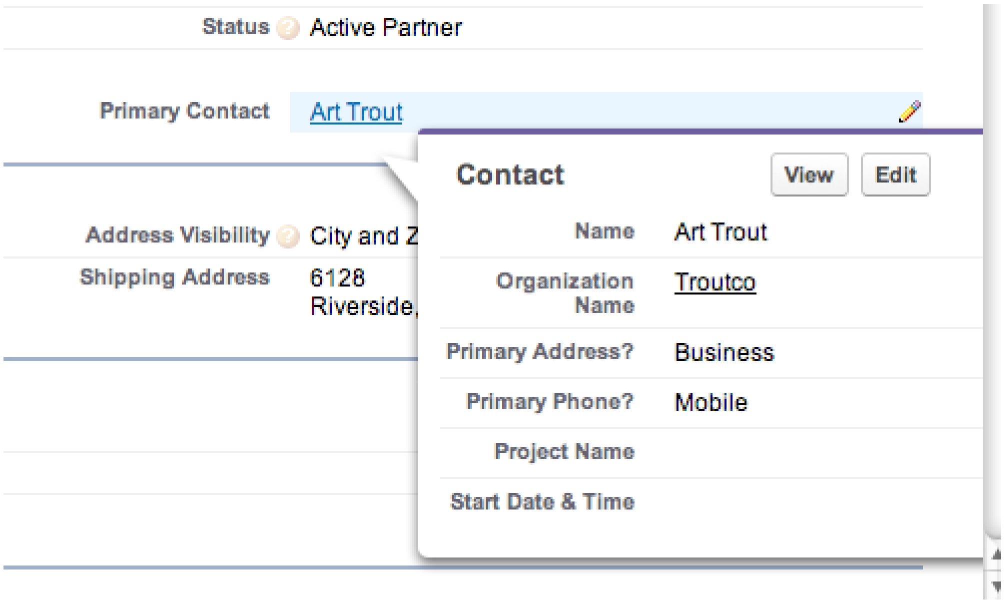


fields with a red bar to the left of them are Required Fields. You will be unable to save the record if these are not populated.

Help is available for many fields

Help is available for fields that have a small yellow questionmark next to them. Hovering over the questionmark symbol will open a yellow pop-up window with information about the field.

Many Fields are hyperlinked - which takes you to the record or URL associated with the link.

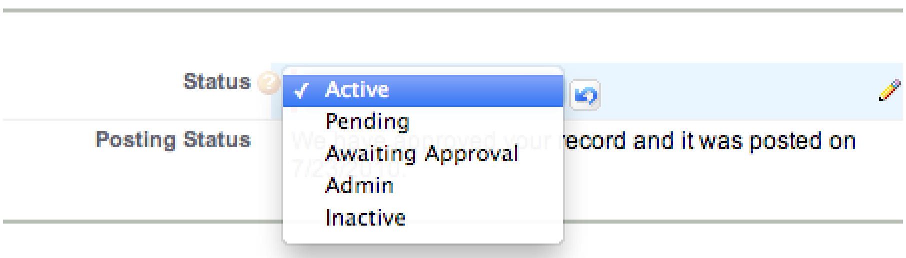


Hovering over a link that is connected to data in another record, will cause a hover menu to appear with some additional information about that record.

You can then choose to view or edit the related record.

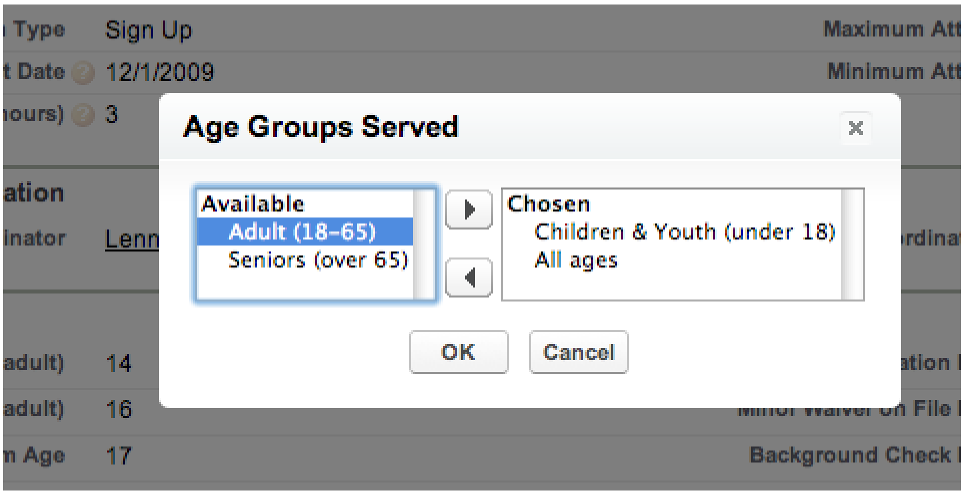
Clickinig on the link will take you directly to that related record.

Picklist



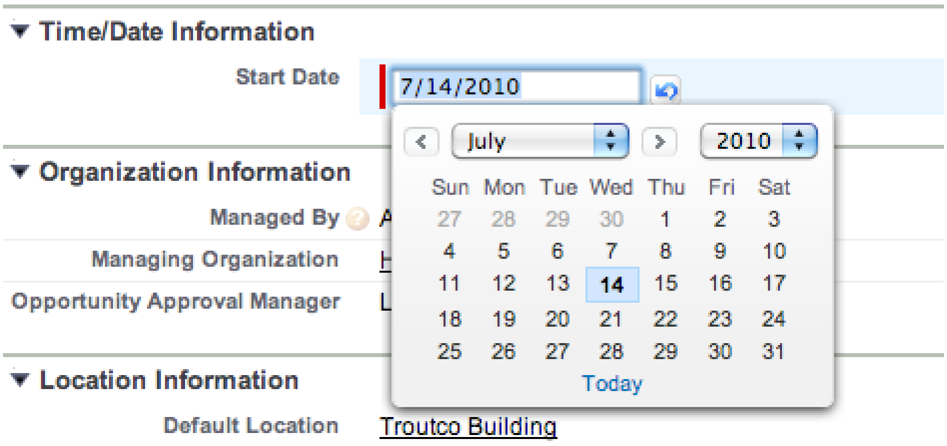
Picklist: - a dropdown menu that allows you to select one value

Multi-Picklist



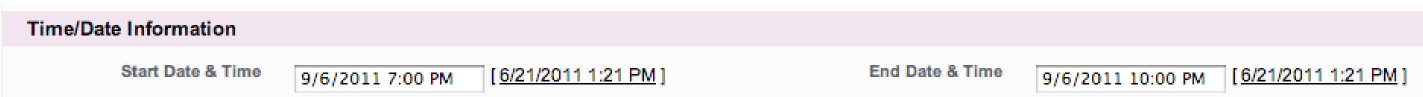
Multi Picklists: These are lists of choices where you can select more than one value. When you edit you get a box showing values that are available and those that are chosen. You can move values from being chosen or not by clicking on a value and then clicking the triangle that moves them from one side to the other.

Date Fields



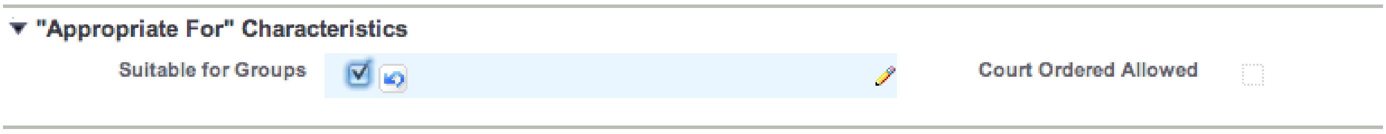
Date Field - Clicking on a date field opens up a calendar. You can either select the date from the calendar OR manually type it in in the format x/xx/xxxx

Date and Time Field



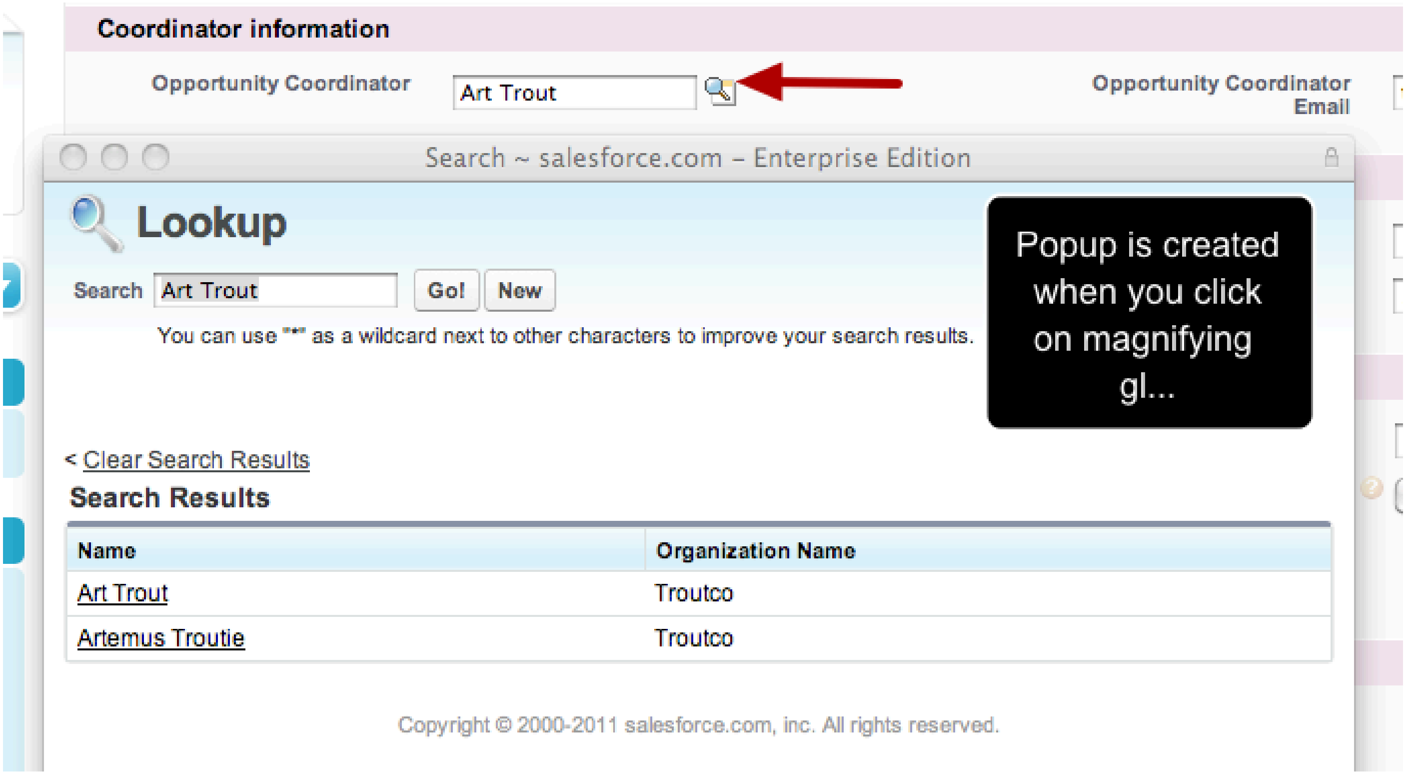
Date & Time Field - This is one field that has both the date and the time in one field. Matching the required format of this field is important when working with these fields which are used for date and time specific volunteer occurrences and connections in HandsOn Connect.

Checkboxes



Checkboxes: These have a value of TRUE or FALSE. Checking the box gives it a value of True.

Lookup Fields



Lookup Fields: These fields have a small hourglass which allows you to search for an existing record in the system. (Clicking on the magnifying glass opens a llokup/search popup.

Lookup fields can only be populated with values that exist in the system as they are used to relate one object to another. (*Note: Some lookup fields have restrictions coded in them that only allow certain values to be found in the system).*

There are many other types of fields you'll encounter as you work with HandsOn Connect and Salesforce.

Working with Views

Working with List Views

A view is a way of seeing a filtered view of the records of a given record type. Views are available in the tabs for each object you find in the navigation for Salesforce and HandsOn Connect.

A view is the results you get when you set search conditions that display items that match the search conditions. For example, a view of contacts that have "Birthdays This Month" would filter your list of contacts based on a search for birthdays falling on a day in the current month.

By default, Salesforce.com includes a number of views for each object. But you can also create your own views.

Learn about working with Views:

Here's an article from Trailhead on the basics of working with List Views. (It's written from the perspective of someone who may have used views in Salesforce Classic - but introduces the improvements to List Views that are part of Salesform Lightning.

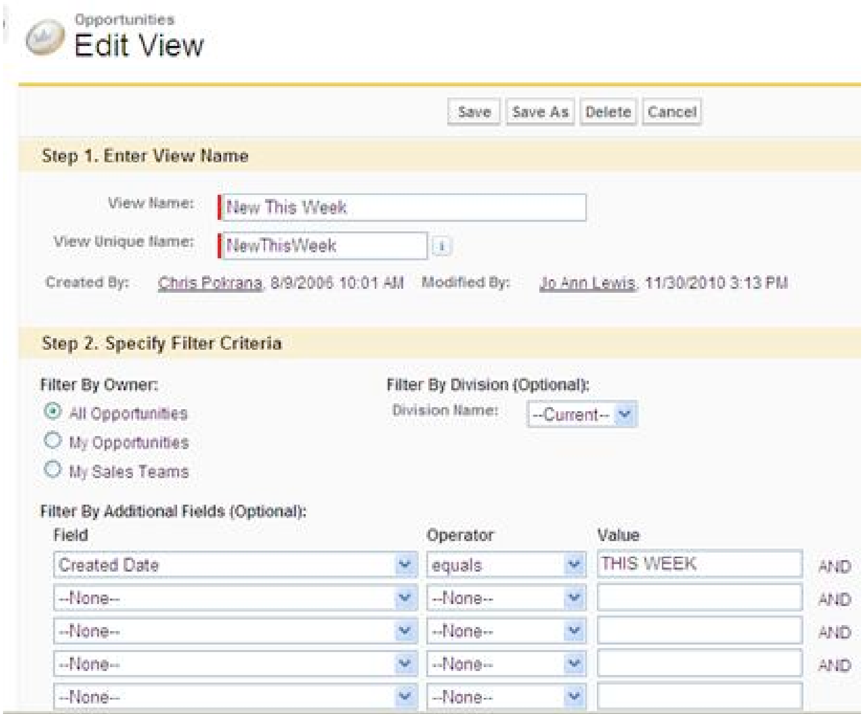
Click here to read "Work with List Views"

Some Handy Ways to Filter a View Based on Dates

Putting specific dates in list views can limit their usability -- because what if you want a list view to show you an interval of time (i.e. all the contacts that were created in the Last Week, for example.

Here's some tips on special terms that can help with your list views!

Dates in List Views



When you are creating a list view based on dates, there is no need to hardcode a specific date. If you use dynamic terms then you can reuse the list view without updating it each time.

Example – I want to create a list view that shows all opportunities created this week. In my criteria I could add “Created Date greater than or equals 4/11/11” but that would mean that next week I would need to change the date to see the new list. However if I use a dynamic term I’ll never have to update the list view again. I could use the Criteria “Create Date equals THIS WEEK”. Problem solved.

The next time you need to create a date based criteria try one of these:

THIS WEEK LAST WEEK NEXT WEEK\L THIS MONTH
LAST MONTH NEXT MONTH

THIS YEAR	LAST YEAR	\ NEXT YEAR
THIS QUARTER	LAST QUARTER	NEXT QUARTER
TODAY	YESTERDAY	\ TOMORROW

LAST <number> DAYS/WEEKS/MONTHS/YEARS or QUARTERS

NEXT <number> DAYS/WEEKS/MONTHS/YEARS or QUARTERS

NOW

You can also add the term FISCAL in front of YEAR or QUARTER. Without it the term refers to calendar year or quarter

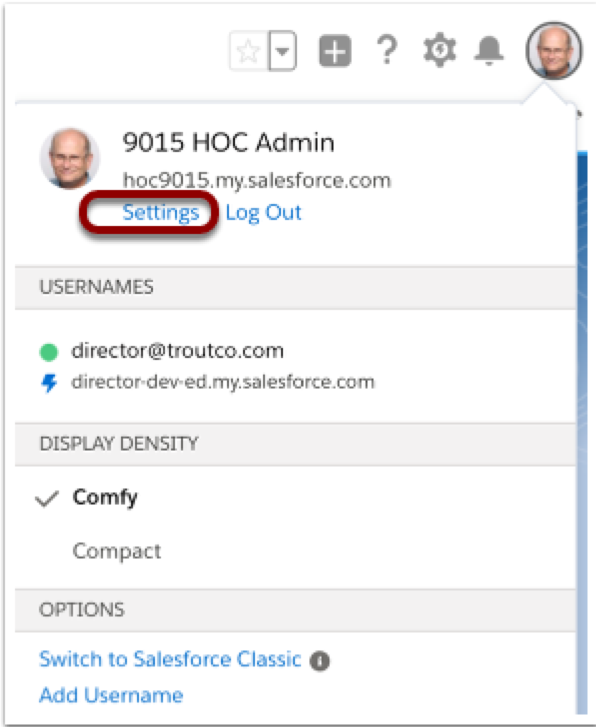
Tasks, Events (Salesforce Calendars), and Sending Emails

My Email Settings

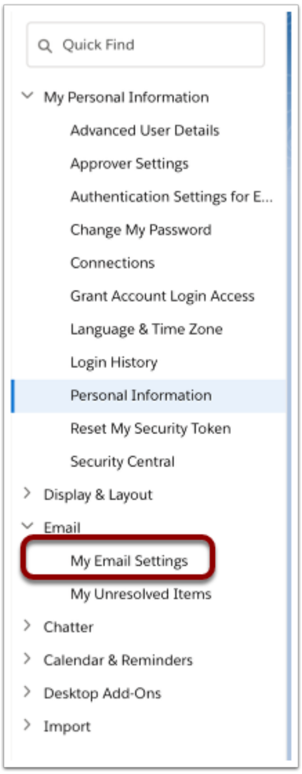
Each Salesforce User can set personal settings related to emails they may send to contacts directly from a contact record.

Email Settings in Salesforce Lightning

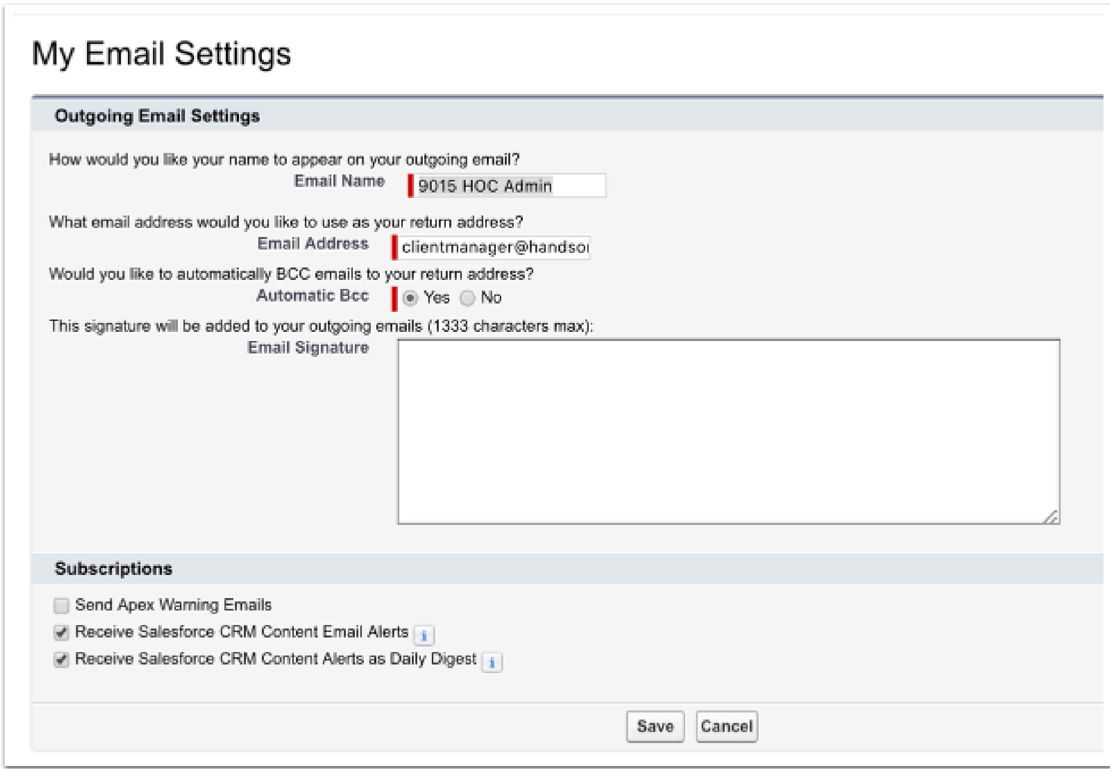
Click on the icon on the upper right which is your personal settings. Click on the "Settings" link to customize your settings.



select "My Email Settings" from the many options available to you in personal settings.

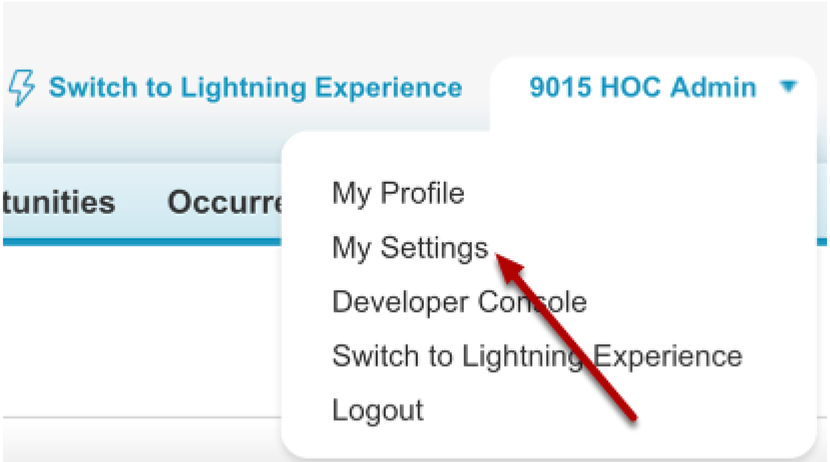


Here you can set your email name, email address (for replies), and add a Signature. These settings will apply to any emails you send directly from Salesforce to a contact. (Note: this does not affect automated emails that are sent via workflows or processes)

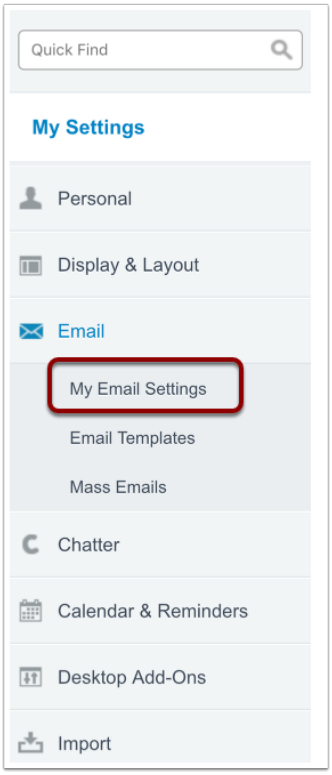


In Salesforce Classic:

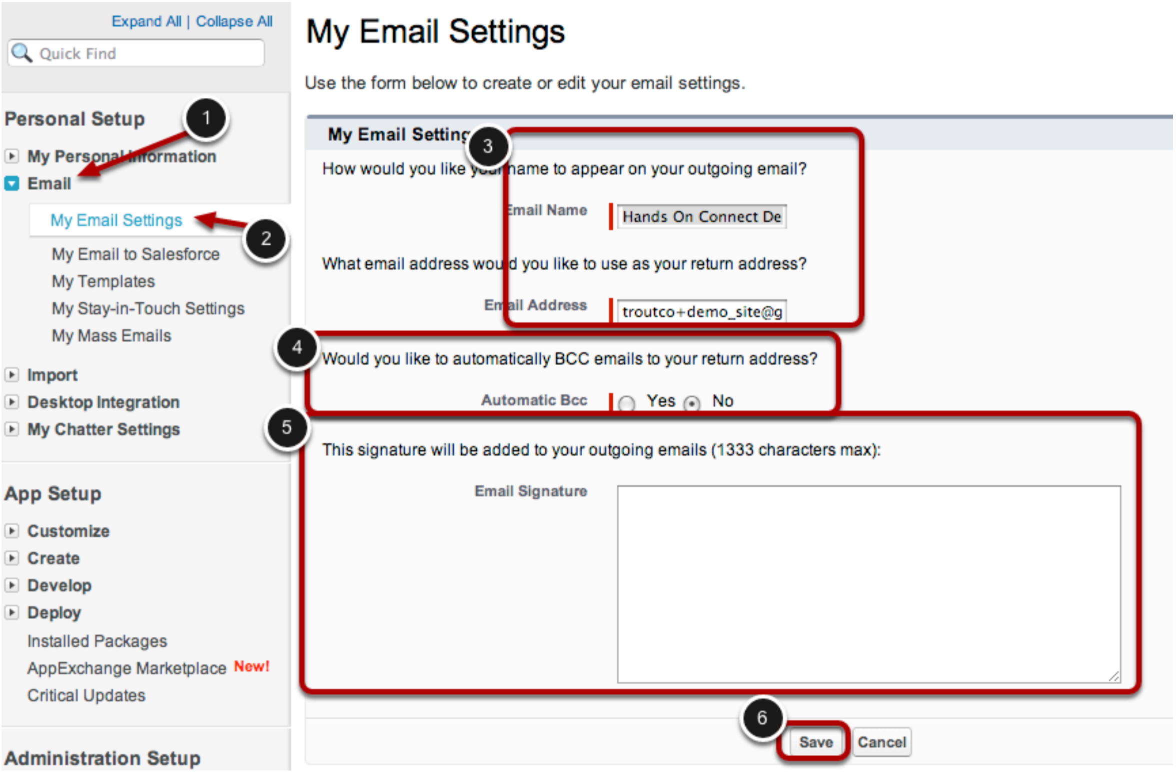
Under your 'name' menu in the header, select "My Settings"



Select My Email Settings from the left menu:



Set Email Preferences



Manage Your Tasks, Events, and Email

Salesforce has native functionality for handling basic organizational chores. In Salesforce these are all types of 'activities"

Tasks - are Salesforce's name for "To Do" items. You can create a task and associate it with any record, set due dates for it, and manage it through completion. Great for reminding yourself of work you need to do related to that record or contact.

Events - Salesforce has its own native calendar, and appointments on that calendar (if you choose to use them), are called Events. Whether or not you have a use for Salesforce events is up to you - and many people use Outlook or Google Calendar and don't want to duplicate this in Salesforce. (Note: There are integrations available in Salesforce to synch your Salesforce events with outlook or Google Calendar. So if you want to use SF events in conjunction with your current calendar solution, you can do so.

Email - Salesforce makes it easy to send an email to a contact directly in Salesforce. This can be handier than using your email client to send an email, because you can create and save email templates (for frequently used communIcations), easily merge in fields from your Salesforce data, and best of all, Salesforce keeps track of the email you sent as a related item to the contact record you sent it from.

Here's an article in Trailhead - that gives you a great overview of how to Manage Tasks, Events, and Email.

The emails discussed here are ones you personally initiate from Salesforce. This has no affect on the automated emails sent by HandsOn Connect through workflows, triggers and processes.

"Data Safety 101" - Be aware of dangers in deleting and cloning records.

Caution: Don't Delete Records without understanding the relationships between records

Salesforce is a relational database. That means one record often has a relationship to another record. For example, a connection record, which is the relationship between a contact and a volunteer opportunity and an occurrence, REQUIRES you to relate it to those other records:

If you delete a volunteer opportunity from the database - then any occurrence and connection that were related to it now become corrupted data - missing required fields. This will cause problems in your reports, and make break things on your public site. It may prevent automated mass updates done in your system from working - because corrupted data (missing required fields) can cause automations to fail.

Generally speaking: Don't delete records!

Until you get comfortable and understand the relationships between objects in HandsOn Connect - we recommend avoiding deleting records alltogether.

Instead of deleting a record - you can change its status to inactive. It remains in the database because it needs to if it has 'child' objects that depend on it.

Even though you no longer work with an organization (for example) - you have worked with them in the past and if you delete the organization record, then any volunteer opportunity or relationship you've had with them in the past with be corrupted in your data. You'll be missing critical information that affects your overall data integrity.

Is there a safe way to delete records? Can I ever delete records?

Yes. But first you need to understand the dependencies the record has on other records.

We recommend that anyone considering deleting records in Salesforce first read the chapter on The Hazards of Deleting Data found in our Data Management manual . It'll explain when NOT to delete data - and how to SAFELY delete data when you need to.

Click here to read these four articles before deleting any data!

Deleting Records

"My Public Site No Longer Works, what can happen if you delete records........

If you MUST delete data -= it needs to be done with care.

How to Manage the Recycle Bin.

Be cautious if cloning records in HandsOn Connect

In addition to creating new records and editing records - Salesforce makes it possible to delete records (which we do not recommend) and also to "clone" records.

The Salesforce practice of cloning records seems like a great time-saver. Clicking on the 'clone' button on a record, creates an exact duplicate of the record, which you can then edit to make it a unique record. (i.e. clone a contact and then just change the name).

However cloning in HandsOn Connect can create problems because there are hidden fields in many HandsOn Connect custom objects - that are updated when you first create a NEW record using the established procedures. Unless you know the intricacies of HOC custom objects - cloning may create corrupted records that don't work as you expect on the public site.

There is a strong temptation to clone volunteer opportunities to create similar ones, or to make changes to volunteer opportunity fields that cannot be changed after an opportunity has been created (like Project / Activity, Scheduling type of the volunteer opportunity, etc.). But cloning can actually create more problems than it solves, and we don't recommend cloning certain objects in HandsOn Connect.

Particularly - you should not clone Volunteer Opportunity records for a number of reasons:

Cloned Volunteer Opportunities do not have all the same characteristics as those created by the Volunteer Opportunity Wizard.

When you use the Volunteer Opportunity wizard to create a volunteer opportunity - it does several things that cloning will NOT do:

- Cloning will not automatically create an occurrence record for you. You'll need to do this as an additional step.
- There are hidden fields in the volunteer opportunity record which are populated when you create an opportunity in the VO wizard. These fields may not have the correct values if you clone an existing volunteer opportunity.

Cloning a record may not trigger the normal workflows and

triggers associated with that record type.

There are automations that take place when a new record is created - and in some cases, cloning an existing record may not properly trigger the expected workflows. Be sure to test and make sure a cloned record does function as you expect it to before making a regular practice of cloning certain objects.

Cloning a contact will not clone its profile and portal access

If you have a contact that has customer portal access. The new record will not automatically have the same access.

Is it ever OK to clone?

There are some situations where cloning may make sense -- but it does require a thorough understanding of how the system works to know whether or not it is safe to clone. It is probably safe to clone in the following situations:

- The record will only be used on the admin side of the system, and not shared with partners or volunteer leaders.
- The record type does not trigger any workflows that send emails.
- You have a clear understanding of the required fields for normal HandsOn Connect operation, for the record type you are cloning. And whether they need to be unique -- or should be blank initially and automatically filled in when the record is saved.
- Completely test any cloned records you create - to ensure they operate as you expect in the system. (Do not assume a cloned record will work in the same way as one created from scratch in the system)

The page layouts for Occurrences and Connections in HandsOn Connect are very fast and easy to create from scratch. Only a few fields need to be filled in. So cloning is not really a great time saver for those objects.

Volunteer Opportunities should almost always be created using the Volunteer Opportunity wizard.

We strongly urge System Administrators to limit the permission to clone to themselves, and internal staff who have been fully trained on when cloning is appropriate.