

ADVANCED SYSTEM ADMINISTRATOR GUIDE

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Troubleshooting HandsOn Connect

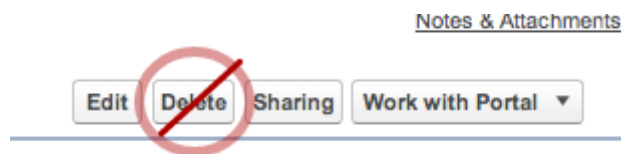
Troubleshooting HandsOn Connect - (The 7 commandments of HandsOn Connect)

Is your calendar not showing up on the public site? Are searches taking you to error pages saying "You must be logged in to view this page?". Are you getting cryptic error messages about "missing rows"? Most errors that occur in HandsOn Connect stem from violating a few simple rules that 'break' the product.

If you follow these "11 commandments of HandsOn Connect," you will prevent problems before they happen and have a solid and stable system.

If you ARE having problems, check to make sure none of these things have been violated and use this guide to correct simple things that create big headaches :-)

1. Do not delete any record that has any related objects associated with it



Volunteer Opportunities and Occurrences have fields that are required in order for them to be published. If you delete a primary contact, or a location, or an organization that is used as a managing organization or organization from the system, you will have published an occurrence that is now missing required information. It will certainly foul up future reporting, or worse yet, crash the public site search or opportunity calendar. This is the common cause of search or the calendar returning errors or log-in messages on the public site such as "Insufficient privileges" and "Authorization required"

See this post for explanation of [what happens when deleting data](#).

Do you have Corrupted Data?

The data that can create the most systemic problems if required records are deleting are Volunteer Opportunities and Occurrences. There are two reports available that will show you if you have any corrupted data due to deleted Volunteer Opportunities, Locations, or Organizations. They are both in the folder HOC Support:

- Missing Information - Occ
- Missing Information - VO

Check both these reports to see if you have any corrupted occurrences and/or Volunteer Opportunities and clean up this data and/or delete any of these records IF they do not have child records themselves. (For example, you don't want to delete a corrupted occurrence if it has any connections associated to it - because then you'll corrupt the connections as well!)

If you find records that are missing needed fields, you will need to repopulate these fields or remove these occurrences/opportunities from ACTIVE status to restore the public site.

Even past corrupted occurrences and opportunities should be cleaned up - because their presence will keep certain nightly bulk operations from completing.

Check you recycling bin to see if anyone in your org is deleting data.

We have limited delete privileges to system admins who should know better.. but deleted data is the number one cause of public site errors,

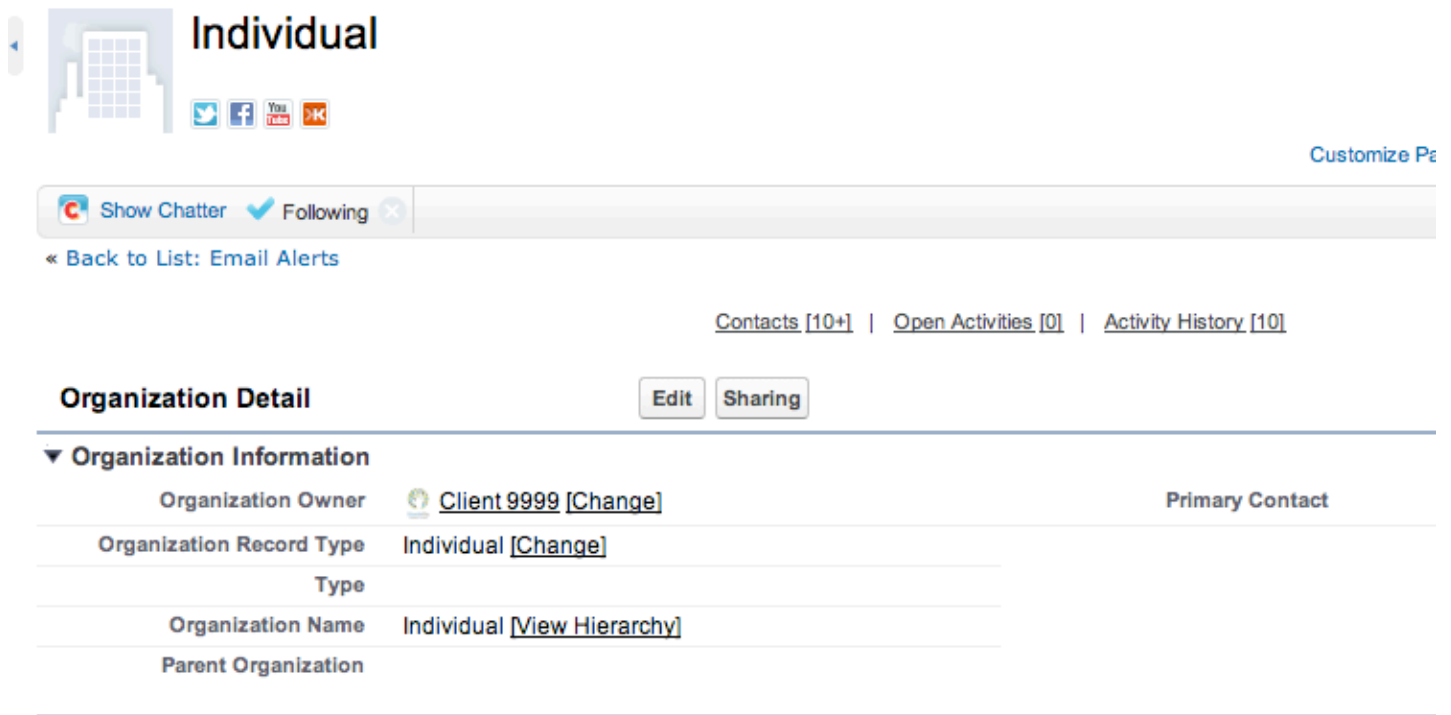
Best Practices when deleting data:

Do not delete a record if it has child or lookup relationships to it. If you want to delete a 'parent' object, first delete any records below it on the dependency food chain. Only delete records that have no related records showing in the related lists.

Here are the dependencies you should be aware of when considering deleting a record:

1. **Accounts** - Do not delete an account record if it has related Contacts, Volunteer Opportunities, Locations, or Registration Answers
2. **Contacts** - Do not delete a Contact record if it has related Connections or Volunteer Team Members. Do not delete a contact that is serving as Opportunity Coordinator for any Volunteer Opportunity or Occurrence record.
3. **Volunteer Opportunities** - Do not delete a Volunteer Opportunity record if it has related Occurrences, Recurrences, Grouped Occurrences, Connections, Prerequisites, or Skill Ratings.
4. **Occurrences**: Do not delete an occurrence if it has related connections.

2. Do not delete, edit or rename the organization named "Individual" in the system



Individual

Customize Profile

Show Chatter Following

« Back to List: Email Alerts

Contacts [10+] | Open Activities [0] | Activity History [10]

Organization Detail Edit Sharing

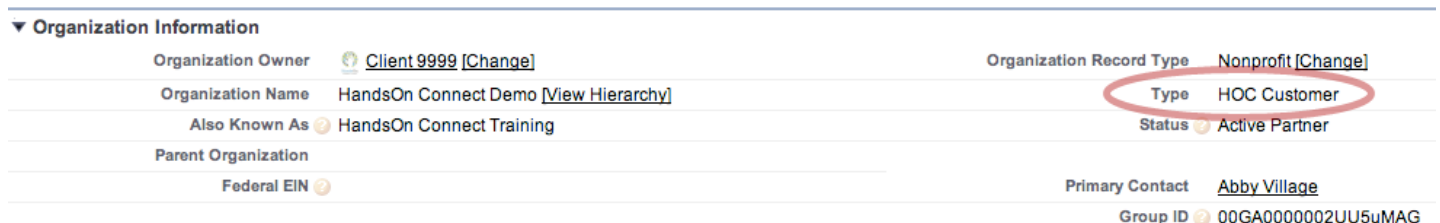
▼ Organization Information

Organization Owner	Client 9999 [Change]	Primary Contact
Organization Record Type	Individual [Change]	
Type		
Organization Name	Individual [View Hierarchy]	
Parent Organization		

This record must remain as is in the system. Do not change the organization record type or rename the organization. Do not create any other organizations with record type "Individual"

If changed, volunteers may not be able to register on the public site. Even if you are using the Household Account Model - the one Individual Account is required by HandsOn Connect. Just leave it alone :-)

3. YOUR organization record must remain designated as type HOC Customer



▼ Organization Information

Organization Owner	Client 9999 [Change]	Organization Record Type	Nonprofit [Change]
Organization Name	HandsOn Connect Demo [View Hierarchy]	Type	HOC Customer
Also Known As	HandsOn Connect Training	Status	Active Partner
Parent Organization			
Federal EIN		Primary Contact	Abby Village
		Group ID	00GA0000002UU5uMAG

Do not change it to non-profit (even though you may be a non-profit organization)

There MUST be one, and only one organizational record designated as type HandsOn Connect Customer in the system for HandsOn Connect to function properly. This is YOUR affiliate's record.

4. Do not edit picklists or fields that are used by system functionality or national integration.

I	J
Help/Definition	Editable
Is marked when the contact has identified that they have a disability.	
Identifies the education level as identified by the contact. This list can not be altered.	DO NOT EDIT
Shows the employer as entered by the contact.	
Identifies the employment status as identified by the contact.	Yes
Identifies the ethnicity/race as identified by the contact. This	DO NOT EDIT

Always consult the HandsOn Connect master field list before editing or changing an existing field, to see if it is permissible to change its values.

If the field is marked DO NOT EDIT -- then create a new field allowing you to track values you need for local reporting and tracking.

See this post on the [HandsOn Connect Field List](#).

[Click here to see the complete field list.](#)

Check row J in the spreadsheet to see whether or not editing is allowed for this field. When in doubt - open a support ticket and ask if you can make changes to a picklist that is marked DO NOT EDIT.

5. If working directly with connections (instead of the connection grid in the occurrence record) - be sure to always fill out fields correctly

Connection Edit
CO-088381

Connection Edit [Save] [Save & New] [Cancel]

Information

Connection Id	CO-088381			Status	[Confirmed]
Volunteer Opportunity	[Habitat for Humanity]			Attendance Status	[Please Verify]
Occurrence	[OC-031361]			Decline Reason	[--None--]
Contact	[Tim Taylor]			Guest Volunteers	[0]
Role	<div> <div>Available Volunteer Team Captain</div> <div>Chosen Volunteer Leader</div> </div>				

Time/Date Information (Manually enter for 'To Be Scheduled' occurrences only)

Start Date & Time	[9/25/2013 12:30 PM] [9/26/2013 5:38 PM]	End Date & Time	[9/25/2013 3:00 PM] [9/26/2013 5:38 PM]
-------------------	--	-----------------	---

1) Attendance Status should never be null... either report attendance or place in "please verify" attendance status.

2) Make sure all connections have at least the role "Volunteer" -- (this field should never be null)

3) If attendance status = "Attended (and hours verified)" be sure that hours served > 0. This will be automatically calculated for you when you save the record. But do not remove the hours served filled contents when editing in the future. Make sure there is a value > 0 and it is never blank.

4) If attendance status = "Not attended" be sure that hours served = 0. It should not be left 'null' or errors will occur for teams.

6. Do not designate your staff or partner staff as Volunteer Leaders.

Staff members can be Opportunity Coordinators, but they are not Volunteer Leaders and their hours do not qualify as volunteer hours. Hence, they should not have connection records in the system.

ONLY grant Volunteer Leader role to contacts that have the Volunteer Profile. (Inability to update multiple records in the connections grid is an error that occurs if an improper volunteer leader designation is made).

NOTE: If members of your staff DO lead volunteer opportunities that are NOT part of their job responsibilities, then they should create a separate contact record for that purpose, using a personal email address instead of their work address.

7. Be careful when using the data loader to bulk load locations, occurrences, and volunteer opportunities

If you are using the data loader to bulk load Volunteer Opportunities, Occurrences and Locations -- and find that the opportunities do not appear in search, double check that you are filling all required fields and getting information into the CORRECT fields.

As we learn of problems folks have had -- we'll note them here to save you from making similar data errors:

1) When bulk uploading locations. Make sure that zip codes are mapped to the "Zip/ Postal Code"(lookup field), and not the Zip code (text field).

Diagnosing problems using the HOC Support Reports

When certain kinds of records in your database are missing required fields, it can cause problems in your system such as volunteer opportunities not showing up on your public site when intended, encountering error messages when trying to edit the records and at the most dire breaking your public site. Even though we advise you time and time again not to delete records in your system, we recognize that key data sometimes is deleted by accident. Never fear, we have installed some tools to help you diagnose the problem.

Missing Information Reports

HOC Support

Find reports and dashboards...		All Items	All Types
Action	Name	Folder	Created By
	Reports out the Volunteer Opportunity IDs for the related Volunteer Leader	HOC Support	V100001_Art
	Security Occurrence-Volunteer Leader Used to report out the Occurrence ID related to the Volunteer Leader	HOC Support	O'rdoqui, Art
	Security Connections- Volunteer Leaders Used to report out the Contacts Ids related to the occurrences with Volunteer Leaders.	HOC Support	O'rdoqui, Art
	Contact Records Issue License Used to pull the Contacts in the system to create Users	HOC Support	O'rdoqui, Art
	Missing Information- VO Shows if any Volunteer Opportunities are missing the required information.	HOC Support	Admin 9999, HandsOn Conn...
	Missing Information-Occ Shows if any Occurrences are missing the required fields.	HOC Support	O'rdoqui, Art

In order for volunteer opportunities and their occurrences to appear on your public website, they cannot be missing any required fields. We have created two reports, Missing Information - VO and Mission Information - Occ to help you diagnose if you have any Volunteer Opportunities or Occurrences which are missing required fields.


Missing Information - Volunteer Opportunity

Filtered By: 1 or 2 or 3 or 4 or 5 or 6 or 7 or 8 or 9 or 10 OR 11 OR 12 OR 13 Edit 1. Volunteer Opportunity: Volunteer Opportunity Name equals 2. Status equals 3. Type equals 4. Schedule Type equals 5. Start Date equals 6. End Date equals 7. Managed By equals 8. Managing Organization equals 9. Organization Served equals 10. Default Location equals 11. Maximum Attendance equals 12. Minimum Age equals 13. Minimum Age (w/ adult) equals												
Volunteer Opportunity: Volunteer Opportunity Name	Status	Type	Schedule Type	Start Date	End Date	Managed By	Managing Organization	Organization Served	Default Location	Maximum Attendance	Minimum Age	Minimum Age (w/ adult)
Self-Reported Volunteer Hours	Inactive	Project	To Be Scheduled	10/24/2012	10/24/2012	Partner			Self-Reporting Unique Location	1	1	1

In the Missing Information - Volunteer Opportunity report you will see 13 filter criteria at the top. Those are the 13 required fields that if left blank will affect your Volunteer Opportunity appearing on your website. If the report pulls up Volunteer Opportunities missing data you should look to see which of the 13 fields are missing data. You should immediately address any volunteer opportunities which are in active status and are still upcoming. If the volunteer opportunity is in any status other than active or the date has passed it isn't critical that you address it (although for good housekeeping and to help diagnose future problems it is a good practice to take care of those when you get a chance).

As you can see in the example above this volunteer opportunity is missing the Managing Organization and Organization Served (probably as a result of 2 organizations being merged and orphaning this self-reported opportunity). Because this is in inactive status, I don't have to clean it up. Please note self-reported opportunities are unique because none of their fields can be edited so you may find some orphaned self-reported opportunities if you've been de-duping organizations.

Missing Information - Occurrence


Missing Information-Occ

Report Generation Status: Complete

Report Options:

Summarize information by: --None--
Show: All occurrences

Time Frame
Date Field: End Date & Time
Range: Custom
From: To:

Run Report
Hide Details
Customize
Save
Save As
Delete
Printable View
Export Details

Filtered By: 1 OR 2 OR 3 OR 4 OR 5 OR 6 [Edit](#)
1. Location equals
2. Volunteer Opportunity equals
3. Start Date & Time equals
4. End Date & Time equals
5. Status equals
6. Maximum Attendance equals

Occurrence: Occurrence ID +	Location	Volunteer Opportunity	Start Date & Time	End Date & Time	Status	Maximum Attendance
OC-029362	Troutco Warehouse		4/30/2012 12:00 AM	8/31/2012 12:00 PM	Active	500
OC-029515	HandsOn Connect Training Room		8/31/2012 10:00 AM	8/31/2012 4:00 PM	Active	25
Grand Totals (2 records)						

In the Missing Information - Occurrence report you will see that there are 6 filter criteria for the required fields in occurrences. If you have occurrences appearing in your report check to see which of the 6 fields are missing and then address them. As with Volunteer Opportunities, if the Status is Active and the Occurrence end date is in the future, you should fix the Occurrence's missing data. If the status is not Active or the date has passed it isn't critical to address it, but for good housekeeping you may want to clean them up. As you can see in the example above, the Occurrences are missing the Volunteer Opportunity. Please note you cannot delete Occurrences which are missing Volunteer Opportunities. If you want to delete them for some reason you will first need to associate them with a Volunteer Opportunity (and it must be one whose dates encompass those of the occurrence) and then you'll be able to delete the occurrence.

It is a good idea to run these reports periodically to make sure your data is complete. If you have active Volunteer Opportunities and/or Occurrences whose end date is in the future, not only will missing data cause the volunteer opportunity and occurrence not to appear on your website, but it can cause other opportunities and occurrences to not appear and eventually could break HandsOn Connect until your data is fixed.

How to Update or Change Internal and Partner Staff

First things to do before deactivating a user or removing portal access. Some tips on staff changes:

Don't replace or update a user. Always deactivate an old user, and create a new one.

There is often the impulse to just 'update' one contact record with another's info (as well as their user record) - but this is not the best way to go. Because if you do so - you've sort of turned two people into one and will never know what the 'old user' did, and what the 'new user' did.

Instead - create a new record for the new staff person - and then remove portal access or deactivate the user account for the departing staff person. This way you'll preserve the history of your data.

Additionally you should audit data that affects future actions:

For Internal Staff and/or System Administrators

1. Does the person who is leaving have any system-wide roles like primary System Administrator, or Opportunity Approval Manager or Partner Approval Manager. If so, you need to replace them in this role with someone else on your staff. See the next three articles in this section for the 'how to'.
2. Are there any workflows or email alerts that they are associated with? If so, you need to have someone else on staff assume the role of sender, or receiver of tasks, email alerts, etc. (See [Managing and updating special email addresses used by HandsOn Connect](#))
3. Check the [HOC Customer Record](#) in the system. Make sure they are not the primary contact, or the Opportunity Approval Manager, or Partner Approval Manager in this record.

For All Opportunities and Occurrences: Don't change past records - but update future occurrences and active volunteer opportunities.

You don't want someone who is leaving the organization to be the Opportunity Coordinator for any future occurrences! (They won't be able to respond or take action after you remove their license). You don't want to change past history (then you'll know who the coordinator WAS last year).... but you need to update future occurrences.

1. Audit your active volunteer opportunities, and make sure the departing staff member (or partner staff), is not the Default Opportunity Coordinator for any of the opportunities.

Assign someone else on the partner staff or your staff as the default opportunity coordinator. (Since this will be automatically populated in future occurrences you create)

2. Look at all occurrences that have an end date > today --- and update each of the occurrence records to reflect a new Opportunity Coordinator (who will still be on staff).

Change ownership of organization records to an active user

There are a few situations in which having an inactive user as the 'owner' of an organization record can create some problems. So before (or after) deactivating a user, transfer the ownership of their organization records to your current system administrator.

To do this go to Setup / Data Management / Mass Transfer Records and click on "Transfer Organizations" link.

Indicate who to transfer From (the user who will no longer be active), and who to transfer to (Your system Administrator, though it can be any active user).

After you've done this:

You'll now be able to safely remove their portal access (for partner organizations, volunteer leaders, etc.) or make their user account inactive (for staff and/or system administrators). This will preserve the history of all your data -- but make things taking place in the future reflect the fact that the person is no longer with the organization.

See the remainder of this chapter for specifics on how to manage change for specific types of users.

How to Change Your System Administrator

If you have a staffing change at your organization and have a new staff person taking over as your system administrator, there are several places in your HandsOn Connect system that you will need to make changes so the new system administrator is getting all of the notices they should and the system continues to operate as it should. Please review the steps below to make all of the needed changes to reflect your new staffing.

The first thing you should do when changing System Administrators is to let the HandsOn Connect Team know you are changing System Administrators and giving them the name and contact information for the new System Administrator.

Also the new System Administrator should create an account for themselves in ZenDesk.

User Changes

First Name	Last Name	Username	Email	Role	Last Login	Profile	Active
John	John	john	john_training@handsonconnect.org	System Administrator	9/11/2012 10:39 AM	CEO	✓
Kirby	Davis	dkirb	dkirby_training@pointsoflight.org	System Administrator	7/10/2012 11:11 AM	CEO	✓
Lewis	Shea	slawi	shea.lewis+hoc@salesforce.com	System Administrator	1/18/2012 12:43 PM	CEO	✓
O'roguai	Art	aordo	aordoqui_training@handsonconnect.org	System Administrator	9/6/2012 9:18 PM	CEO	✓
Staff	Sally	staffra	staff@handsonconnect.org	Staff	9/16/2011 7:27 PM	CEO	✓
Tarr	Colin	ctarr	ctarr@handsonnnetwork.org	System Administrator	8/24/2010 2:25 PM	CEO	✓
Tester 1	UAT	utest1	uattester1@handsonconnect.org	System Administrator		CEO	✓
Tester 2	UAT	utest2	uattester2@handsonconnect.org	System Administrator		CEO	✓
Tester 3	UAT	utest3	uattester3@handsonconnect.org	System Administrator		CEO	✓
Tester 4	UAT	utest4	uattester4@handsonconnect.org	System Administrator		CEO	✓
User Sample	New	sadmi	troulco-sample@gmail.com	System Administrator		CEO	✓
Van Riper	Paige	rvan	paigedemo@pointsoflight.org	System Administrator	9/12/2012 1:53 PM	CEO	✓
West	Allison	awest	awest_training@handsonconnect.org	Staff	5/3/2011 11:28 AM	CEO	✓
Yarbrough	Jordan	jvarb	yvarbrough_training@handsonconnect.org	Staff	7/15/2010 2:32 PM	CEO	✓
Zito	Kelly	kzito	kzito_training@handsonconnect.org	System Administrator		CEO	✓

If your new system administrator is new to Salesforce, you will need to add them as a user.

To do that go to **Setup/Administration Setup/Manage Users** and 1) click on **Users**, 2) then click on **New User**.

User
Larry Deckel[Edit Layout](#) | [User Profile](#) | [Help for i](#)[Permission Set Assignments \[0\]](#) | [Personal Groups \[2\]](#) | [Public Group Membership \[10+\]](#) | [Queue Membership \[0\]](#) | [Managers in the Role Hierarchy \[0\]](#) | [Remote Access \[4\]](#) | [Third-Party Account Links \[0\]](#) | [Login History \[10+\]](#)

User Detail

[Edit](#) [Change Password](#) [Login](#)

Name	Larry Deckel	Role	CEO
Alias	LDeck	User License	Salesforce
Email		Profile	System Administrator
Username		Active	<input checked="" type="checkbox"/>
Community Nickname	Ldeckel_training i	Marketing User	<input type="checkbox"/>

Create the new user by entering their email address which will become their username.

Give them a User License of Salesforce, and then their Role should be CEO, and their profile "System Administrator"

Be sure to save the record and check the box "Generate New Password and notify user immediately".

Next you will need to update the system emails to use the new System Administrator

Go through all the email settings described in the chapter in this manual, [Managing and Updating Special Email Addresses used by HandsOn Connect](#)

For each setting, you will need to remove the departing system administrator and use your new system administrator user account.

Once all email addresses have been updated, you can deactivate the old system administrator account

User Edit [Save](#) [Save & New](#) [Cancel](#)

General Information | = Required Information

First Name	<input type="text" value="Josh"/>	Role	<input type="text" value="CEO"/>
Last Name	<input type="text" value="Kidd"/>	User License	<input type="text" value="Salesforce"/>
Alias	<input type="text" value="jkidd"/>	Profile	<input type="text" value="System Administrator"/>
Email	<input type="text" value="jkidd@pointsoflight.or"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text" value="jkidd_training@hands"/>	Marketing User	<input checked="" type="checkbox"/>
Community Nickname	<input type="text" value="jkidd"/> i	Offline User	<input type="checkbox"/>
Title	<input type="text"/>	Sales Anywhere User	<input type="checkbox"/>
Company	<input type="text"/>	Force.com Flow User	<input type="checkbox"/>
Department	<input type="text"/>	Accessibility Mode	<input type="checkbox"/> i

Go to **Setup / Administration Setup / Users** and click on the user account for the departing system administrator. Uncheck the checkbox marked active, and save the record.

NOTE: You will be unable to deactivate a system administrator if they are still being used for any of the special email addressed used by the system. (See step above)

NOTE: If the System Administrator is also the Partner Approval Manager, Opportunity Approval Manager, and/or Volunteer Leader Approval Manager, you will need to make additional changes before deactivating this user. See the posts that follow in this chapter for updating those organizational roles.

Note: If the user is being used by any email alerts in the system, you will be notified that you cannot yet deactivate the user.

Unable to Complete the Requested Change
 Your changes could not be completed for the following reasons:

Reason	Section
This user is being used by email alerts.	Email Alert

Click [here](#) to return to the previous page.

Clicking on the email alert link will take you to a list of all the email alerts. You'll have to check each one and insure that this user is not the sender or a recipient.

Here we tried to deactivate Davis Kirby - and found he was

Expand All | Collapse All

Quick Find

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings
- My Social Organizations and Contacts

App Setup

- Customize
- Create
 - Apps
 - Custom Labels
 - Objects
 - Packages
 - Report Types
 - Tabs
 - ☒ Workflow & Approvals
 - Workflow Rules
 - Approval Processes
 - Flows
 - Tasks
- Email Alerts

Email Alert: SuperDuper Silver Youth

Printable View | Help for this Page

Rules Using This Email Alert: 1 | Approval Processes Using This Email Alert: 0

Email Alert Detail

Edit Delete Clone

Description	SuperDuper Silver Youth	Email Template	Default email sent to occurrence volunteers
Unique Name	SuperDuper_Silver_Youth	Object	Contact
From Email Address	"troutco+System_Test@gmail.com" <troutco+system_wide@gmail.com>		
Recipients	User: Davis Kirby		
Additional Emails	dkirby@troutco.com		
Created By	Davis Kirby, 5/17/2011 11:54 AM	Modified By	Davis Kirby, 5/17/2011 11:54 AM

Edit Delete Clone

Rules Using This Email Alert

Rules Using This Email Alert Help

Action	Rule Name	Description	Object	Active
Edit Del Deactivate	SuperDuper Silver Young Adult	This goes to Age: 10 - 16 for 100 - 249 hours of service	Contact	✓

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help

This alert is currently not used by any approval processes

[Back To Top](#)

Always show me [fewer](#) / [more](#) records per related list

If the user is used as a named user in any email alerts, you'll need to change these as well, before you can successfully deactivate the user account.

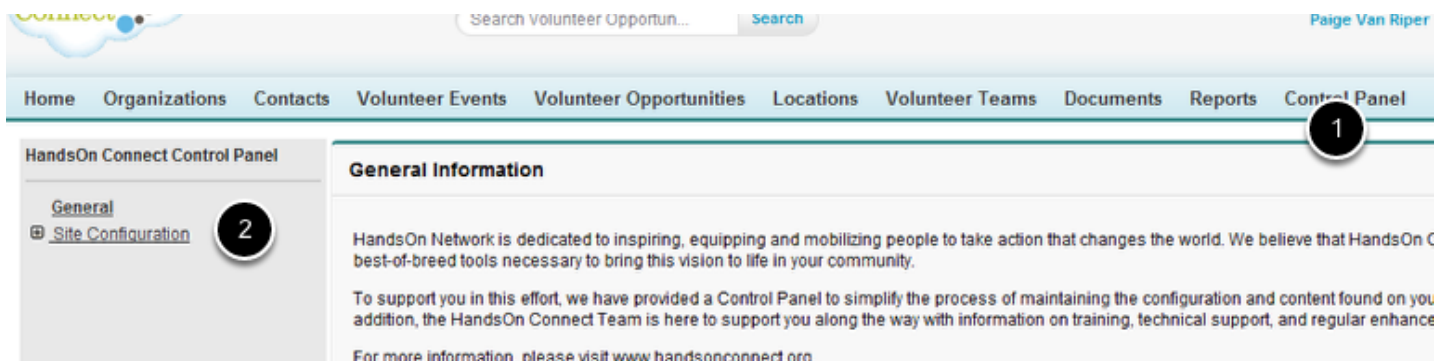
Note: Be sure that at least one person on your staff is given the profile of system administrator before you deactivate the original system administrator.

Note: You should avoid having more than two system administrators in your system.

How to Change Your Partner Approval Manager

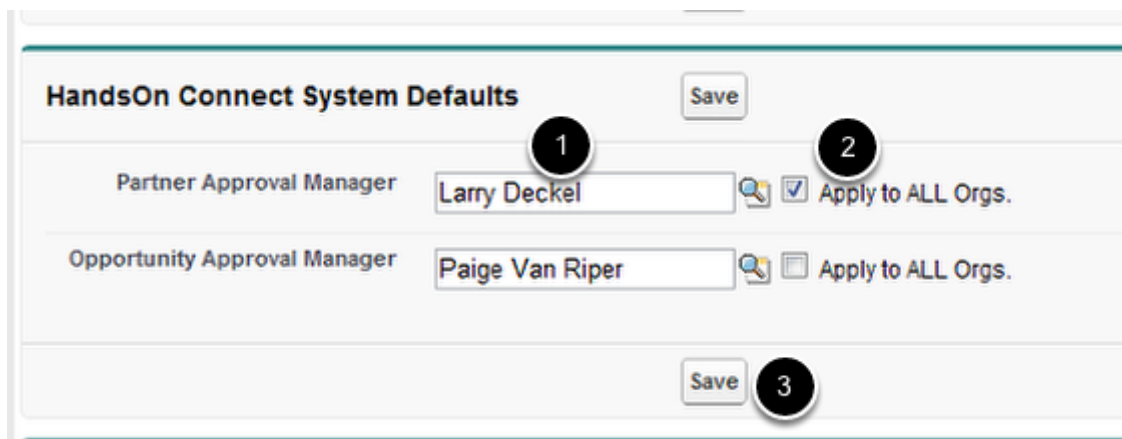
If you have recently made or are about to make staffing changes to your Partner Approval Manager, please follow these steps to transition HandsOn Connect to the new approval manager. These steps will ensure that your new Partner Approval Manager gets all the notifications they should of new partners and partner changes. If the new approval manager is new to your staff you will first need to set [them up with a user login for Salesforce](#) and then follow the steps below.

Change Control Panel Setting



To change the Partner Approval Manager lookup field in all organization records, 1) go to the Control Panel tab and 2) click on Site Configuration.

Change Partner Approval Manager



Scroll down to the HandsOn Connect System Defaults section in the control panel and 1) look up the new approval manager, 2) check Apply to ALL Orgs (if they are going to be the approval manager for all organizations) and 3) click Save. After you click save the check in the Apply to ALL Orgs will disappear but it should have pushed the change to all organizations.


If you get any error messages from Salesforce after doing this, you'll need to see if some of your organization records are missing required fields that are preventing the batch update from taking place. If you do - open a support ticket in zendesk and we'll help you track down which organizations are missing required information.

Check Partner Approval Manager on Organization Records

▼ Designate How Volunteer Opportunities for this Organization are Approved

Auto Approve Opportunity ☐

Opportunity Approval Manager [Paige Van Riper](#)

Partner Approval Manager [Larry Deckel](#) 

You should spot check several organization records to make sure the change was successfully made. Sometimes there is bad data in the system that may prevent the change from being applied globally. If that is a case open a help desk ticket in ZenDesk so we can help you diagnose the issue. You could also create a list view of nonprofit organization showing the partner approval manager and make sure it is the same for all.

Partner Approval Manager Public Group

Create

Develop

Deploy

Schema Builder

Installed Packages

AppExchange Marketplace

Critical Updates

Administration Setup

Manage Users

Users

Mass Email Users

Roles

Permission Sets

Profiles

Public Groups

Edit | Del

Happy Campers

HappyCampers

Admin 9999, HandsOn Connect

10/17/2010 5:02 PM

Edit | Del

HOCD Sponsor Managers

HOCD SponsorManagers

Deckel, Larry

1/10/2012 2:51 PM

Edit | Del

Jumping for Joy

JumpingforJoy

Admin 9999, HandsOn Connect

10/17/2010 5:02 PM

Edit | Del

Justice League of America

JusticeLeagueofAmerica

Admin 9999, HandsOn Connect

10/17/2010 5:02 PM

Edit | Del

Maco

Maco

Admin 9999, HandsOn Connect

10/17/2010 5:02 PM

Edit | Del

My favorite Partners

MfavoritePartners

Deckel, Larry

7/12/2011 2:10 PM

Edit | Del

Opportunity Approval Manager

OpportunityApprovalManager

Deckel, Larry

9/6/2011 7:38 PM

Edit | Del

Org Review Team

OrgReviewTeam

Kirby, Davis

4/19/2011 2:06 PM

Edit | Del

Partner Approval Manager

PartnerApprovalManager

Admin 9999, HandsOn Connect

9/1/2011 4:27 PM

Edit | Del

Program Staff

ProgramStaff

Deckel, Larry

9/7/2010 2:12 PM

Edit | Del

Programming Staff

ProgrammingStaff

Deckel, Larry

2/14/2011 2:06 PM

Edit | Del

Programming Team

ProgrammingTeam

Deckel, Larry

1/6/2012 7:42 PM

Edit | Del

Report Scheduling Test

Report_Scheduling_Test

Van Riper, Paige

4/26/2012 12:49 PM

Edit | Del

Selected Portal Users

SelectedPortalUsers

Deckel, Larry

1/6/2012 7:20 PM

Edit | Del

Tier 2 Support

Tier2Support

Deckel, Larry

9/6/2010 9:36 PM

Next you should go to Setup/Administration Setup/Manage Users and click on Public Groups. Find the public group named Partner Approval Manager and click on the name.

Users

Group
Partner Approval Manager Help for this Page ?

Edit Delete

Label	Partner Approval Manager
Group Name	PartnerApprovalManager
Grant Access Using Hierarchies	<input checked="" type="checkbox"/>
Created By	HandsOn Connect Admin 9999, 9/1/2011 4:27 PM
Modified By	HandsOn Connect Admin 9999, 9/1/2011 4:27 PM

Group Members View All Users

Name	Type
Larry Deckel	User

In the Partner Approval Manager group you will see a list of all users assigned to that group. Click on Edit.

Add New Partner Approval Manager to Group

Group Membership
Group: Partner Approval Manager

Group Information Save Cancel

Edit Public Group

Label

Group Name i

Grant Access Using Hierarchies ☒ i

Search for: Find

Available Members

- User: Art O'rdoqui
- User: Client 9999
- User: Davis Kirby
- User: HandsOn Connect Admin 9999
- User: HandsOn Connect Demo (Training) Demo & Training
- User: Josh Kidd
- User: Paige Van Riper
- User: Sally Staff

Selected Members

- Larry Deckel

3 Add 2 Remove

Next in the search box 1) select Users and 2) remove the old Partner Approval Manager and 3) add the new manager and 4) click save. The New Organization Registered and Organization Profile Update Notification email alerts are both set to be sent to the members of the Partner Approval Manager public group so you don't need to go to those email alerts and make the change as long as you update the public group.

If you want more than one person on your staff to receive email notification when a new partner applies, you can add additional users to this group.

Check that the email alert "New Organization Registered" is being sent to the Partner Approval Manager Group

The screenshot shows the 'Email Alert Detail' page for 'New Organization Registered (Managed)'. The 'Recipients' field is highlighted with a red box, indicating it is set to 'Group: Partner Approval Manager'. Other fields include 'Description: New Organization Registered', 'Email Template: New Organization Registered', 'Object: Account', 'Namespace Prefix: HOC', 'Installed Package: HOC', 'From Email Address: Current User's email address', 'Created By: Client 9999, 7/8/2010 6:33 PM', and 'Modified By: Larry Deckel, 9/7/2011 6:16 PM'. Below the details, there are sections for 'Rules Using This Email Alert' and 'Approval Processes Using This Email Alert'.

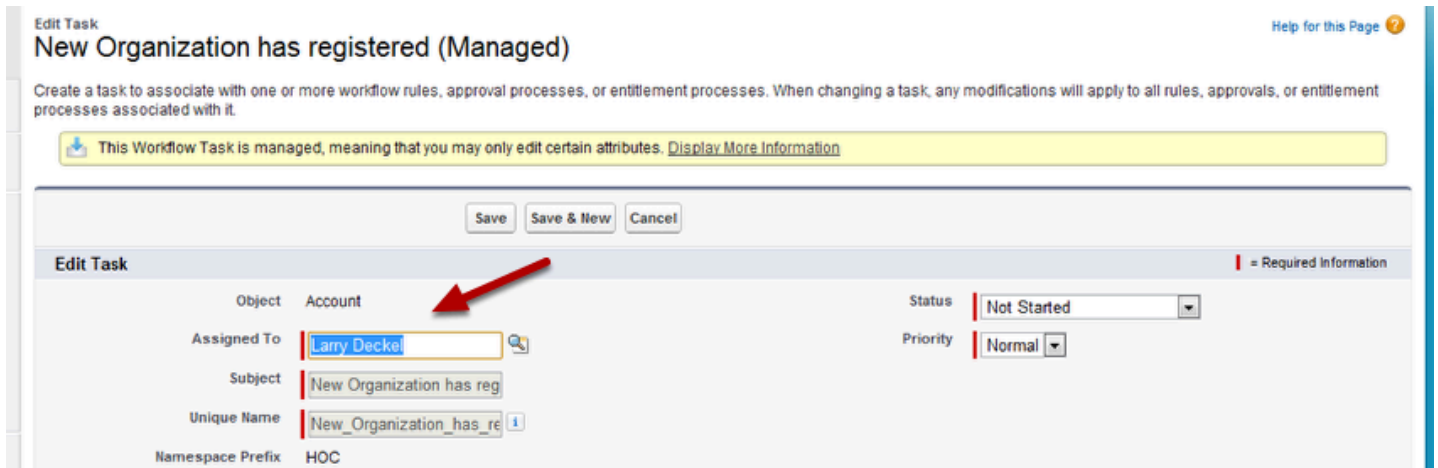
In some older instances of HOC this might have been set to an individual user. Update it if necessary to use the Group.

Edit Approval Task User

The screenshot shows the 'All Tasks' page. A red arrow points to the 'Edit' link next to the task 'New Organization has registered'. The task list includes columns for 'Action', 'Subject', 'Due Date', 'Priority', 'Status', 'Assigned To', 'Notify Assignee', and 'Type'. The task 'New Organization has registered' is assigned to 'User: Larry Deckel' and has a due date of 'Created Date + 1 days'. Another task, 'New Volunteer Opportunity awaiting approval', is assigned to 'User: Paige Van Riper' and has a due date of 'Rule Trigger Date + 1 days'.

Go to Setup/App Setup/Create/Workflows and Approvals and click on Tasks. Find the "New Organization has registered" task and click edit next to it.

Change Assigned User



Edit Task Help for this Page ?

New Organization has registered (Managed)

Create a task to associate with one or more workflow rules, approval processes, or entitlement processes. When changing a task, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

This Workflow Task is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Save Save & New Cancel

Edit Task = Required Information

Object Account Status Not Started

Assigned To Larry Deckel Priority Normal

Subject New Organization has reg

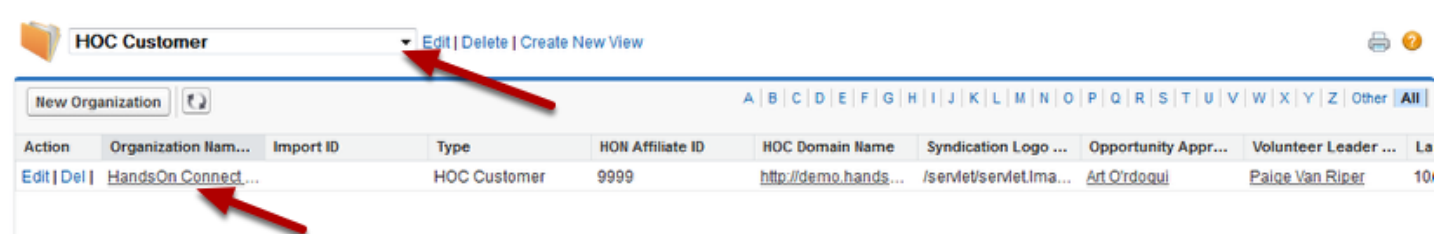
Unique Name New_Organization_has_re

Namespace Prefix HOC

In the Assigned To field do a lookup to the new Partner Approval Manager and select them and then click save. You have now completed all of the steps needed to change the Partner Approval Manager for your organization.

The new Partner Approval Manager will now receive all email alerts and tasks when a new partner organization registers and when an existing organization edits its organization record.

Make sure Your HOC Customer Record reflects the New Partner Approval Manager



HOC Customer Edit | Delete | Create New View

New Organization

Action	Organization Name	Import ID	Type	HON Affiliate ID	HOC Domain Name	Syndication Logo	Opportunity Appr...	Volunteer Leader ...	La
Edit Del	HandsOn Connect...		HOC Customer	9999	http://demo.hands...	/servlet/servlet.Ima...	Art O'rdoqui	Paige Van Riper	10

Go to your HOC Customer organization record (the one for your organization). You can find that by going to the Organization Tab and clicking on the view named HOC Customer then click on your organization name.

Change Partner Approval Manager



▼ Designate How Volunteer Opportunities for this Organization are Approved

Auto Approve Opportunity ☐

Opportunity Approval Manager Art O'rdoqui

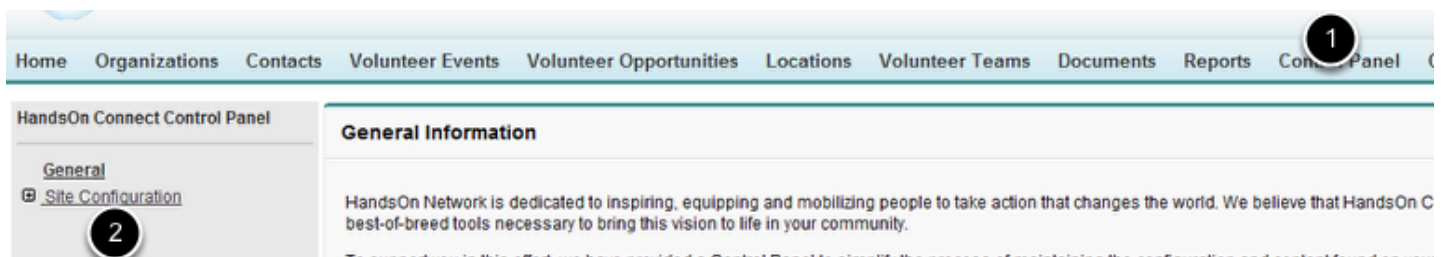
Partner Approval Manager Larry Deckel

Once you're in your HOC Customer record for your organization scroll down to the Designate How Volunteer Opportunities are Approved section and make sure the new Partner Approval Manager is correct in the HOC Customer Record. If not, select the new partner approval manager in the lookup field. Your new Partner Approval Manager should be all set to start approving new partners now.

How to Change Your Opportunity Approval Manager

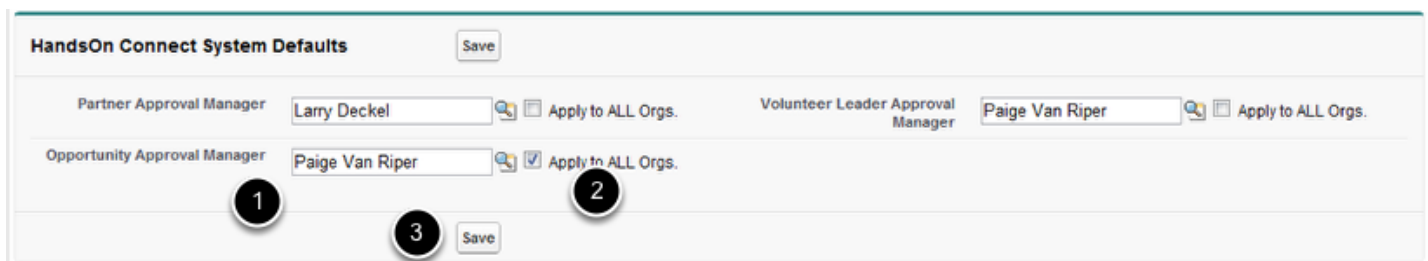
If you have recently made or are about to make staffing changes to your Opportunity Approval Manager, please follow these steps to transition HandsOn Connect to the new approval manager. These steps will ensure that your new Opportunity Approval Manager gets all the notifications they should of new opportunities and occurrences being submitted and of changes to existing opportunities and occurrences. If the new approval manager is new to your staff you will first need to set them up with a user login for Salesforce and then follow the steps below.

Change Opportunity Approval Manager in Control Panel



1) Go to your Control Panel tab and 2) click on Site Configuration.

Globally Change Approval Manager



If your organization uses the same Opportunity Approval Manager for all opportunities you will want to globally change the manager. 1) Perform a lookup to the new Opportunity Approval Manager, 2) check Apply to ALL Orgs. and 3) click Save. **Please note once the changes are saved the check in the Apply to ALL Orgs box will disappear but it will have been applied to all opportunities.

Note: if you use different opportunity approval managers for different organization's opportunities -- you will have to manually update these records. Checking on 'apply to all orgs' will update ALL records with just the one opportunity approval manager.

Notes about error messages you may receive:

- If you get an error message sent to you via email saying there were errors updating records, you'll need to track down the source of the errors. You get this message if any of your organizations, volunteer opportunities or occurrences are missing required information. (This can happen if you delete records from salesforce that are used by other records :-)
- To track down Volunteer Opportunities that may be missing required information, run the report "Missing Information- VO" in the reports tab. It'll show you any opportunities that are missing required fields. If you need help fixing up these 'corrupted' opportunities, open a zendesk ticket or come to a lab for help.
- To track down Occurrences that may be missing required information, run the report "Missing Information-Occ" in the reports tab. It'll show you any occurrences that are missing required fields. If you need help fixing up these 'corrupted' occurrences, open a zendesk ticket or come to a lab for help.
- You can ignore any errors related to volunteer opportunities and/or occurrences that are "Self-Reported Volunteer Hours". These are special records used for self-reporting - and cannot be edited or changed. its not necessary for the bulk update of opportunity approval manager to make changes to these records.

Double-check that the global update was successful

▼ Organization Information	
Managed By	Partner
Managing Organization	Troutco
Opportunity Approval Manager	Paige Van Riper
Opportunity Approval Manager Email	pvanriper@pointsoflight.org
Organization Served	Troutco
Organization Served URL	http://demo.handsonconnect.org/HOC

Go check some Volunteer Opportunity records or create a list view of volunteer opportunities including the Opportunity Approval Manager field to make sure they were globally updated.

Sometimes if there is bad data in your system, the batch update will not work properly. If you find not all Opportunity Approval Manager fields have the new manager's name, please open a ZenDesk help ticket so we can help diagnose the issue.

Change Opportunity Approval Manager Group Members

Administration Setup Manage Users Users Mass Email Users Roles Permission Sets Profiles Public Groups	2	Edit Del	Opportunity Approval Manager	OpportunityApprovalManager	Deckel, Larry
		Edit Del	Org Review Team	OrgReviewTeam	Kirby, Davis
		Edit Del	Partner Approval Manager	PartnerApprovalManager	Admin 9999, HandsOn
		Edit Del	Program Staff	ProgramStaff	Deckel, Larry
		Edit Del	Programming Staff	ProgrammingStaff	Deckel, Larry
		Edit Del	Programming Team	ProgrammingTeam	Deckel, Larry
		Edit Del	Report Scheduling Test	Report_Scheduling_Test	Van Riper, Paige
		Edit Del	Selected Portal Users	SelectedPortalUsers	Deckel, Larry
		Edit Del	Tier 2 Support	Tier2Support	Deckel, Larry
		Edit Del	Tier 3 Support	Tier3Support	Deckel, Larry

Go to Setup/Administration Setup/Manage Users and 1) click on Public Groups, 2) find the Opportunity Approval Manager group and click edit next to it.

Change Group Members

Group Membership
Group: Opportunity Approval Manager

Group Information Save Cancel

Edit Public Group 4

Label

Group Name i

Grant Access Using Hierarchies ☒ i

Search: for: Find

1

Available Members		Selected Members
User: Art O'rdoqui		Paige Van Riper
User: Client 9999		
User: Davis Kirby		
User: HandsOn Connect Admin 9999		
User: HandsOn Connect Demo (Training) Demo & Training		
User: Josh Kidd		
User: Larry Deckel		
User: Sally Staff		

2 Add

3 Remove

1) In the Search box select Users and 2) then add the new Opportunity Approval Manager and 3) remove the old Opportunity Manager and 4) click Save. This will change the recipient of the Occurrence Approval Requested and Opportunity Approval Requested email alerts to the new Opportunity Approval Manager.

Note: If you have multiple people in your organization who review and approve opportunities, you can add as many people as you wish to this group.

Update two email alerts: "Occurrence Approval Requested" and "Recurrence Approval Requested"

Edit Email Alert Help for this Page

Occurrence Approval Requested (Managed)

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to a rules, approvals, or entitlement processes associated with it.

This Email Alert is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Email Alert Edit Save Save & New Cancel

Edit Email Alert = Required Information

Description: Occurrence Approval Requested

Unique Name: Occurrence_Approval_ i

Namespace Prefix: HOC

Installed Package: HOC

Object: Occurrence

Email Template: Occurrence Approval i

Recipient Type: Search: User for: Find

Recipients

Available Recipients

User: 2002 HOC Admin
User: Christina Andoni
User: Tricia Thompson

Selected Recipients

Group: Opportunity Approval Manager

Add
Remove

Go to Setup / Create / Workflows & Approvals / Email Alerts and update the Recipients field for two email alerts: "Occurrence Approval Requested" and "Recurrence Approval Requested"

Recommended Recipients for these two alerts:

1) If only one opportunity approval manager is used or you want ALL your opportunity approval managers to receive email notifications, set the recipient to: **Group: Opportunity Approval Manager**. This will send the email alert to everyone in the group you updated in the step above.

(i.e. ALL opportunity approval managers will receive emails for all opportunities.)

(Set search to Group, in order to find the Opportunity Approval Manager Group)

2) If you use different opportunity approval managers for each organization (i.e. one person has agencies on the west side, another covers agencies on the east side), then set recipient to: **Email Field: Opportunity Approval Manager Email**. In this scenario -- only the one person assigned as the opportunity approval manager for their organization will receive the email alerts, based on who was designated as Opportunity Approval Manager for that organization's opportunities.

(Set search to Email Field, in order to find the email field, Opportunity Approval Manager Email.

Note: The email alert "Opportunity Approval Requested" is no longer used.

Update two task records:

Home Chatter Organizations Contacts Volunteer Events Volunteer Opportunities Occurrences Volunteer Teams Connections Documents Reports +

Expand All | Collapse All

Quick Find

Force.com Home

System Overview

Personal Setup

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

App Setup

- Customize
- Create
 - Apps
 - Custom Labels
 - Objects
 - Packages
 - Report Types
 - Tabs
- Workflow & Approvals
 - Workflow Rules
 - Approval Processes
 - Flows
- Tasks

All Tasks

Tasks are the templates that workflow rules use when automatically assigning tasks to users.

View: All Tasks Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Subject	Due Date	Priority	Status	Assigned To	Notify Assignee	Type
Edit	New Organization has registered	Created Date + 1 days	Normal	Not Started	User : Tricia Thompson	<input type="checkbox"/>	Account
Edit	New Volunteer Opportunity awaiting approval	Rule Trigger Date + 1 days	Normal	Not Started	User : Tricia Thompson	<input type="checkbox"/>	Volunteer Opportunity
Edit	Occurrence Approval Requested	Rule Trigger Date + 1 days	Normal	Not Started	User : Tricia Thompson	<input type="checkbox"/>	Occurrence
Edit	Recurrence Approval Requested	Rule Trigger Date + 1 days	Normal	Not Started	User : Tricia Thompson	<input type="checkbox"/>	Recurrence

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Next go to Setup/App Setup/Create/Worklow & Approvals and 1) click on Tasks, 2) click on edit next to Occurrence Approval Requested, and after completing that (see below) you'll do the same for 3) Recurrence Approval Requested.


Change Task Assignment

Edit Task

[Help](#)

Occurrence Approval Requested (Managed)

Create a task to associate with one or more workflow rules, approval processes, or entitlement processes. When changing a task, any modifications will apply to a approvals, or entitlement processes associated with it.

 This Workflow Task is managed, meaning that you may only edit certain attributes. [Display More Information](#)

SaveSave & NewCancel

Edit Task

ObjectOccurrence

Assigned ToTricia Thompson

SubjectOccurrence Approval f

Unique NameOccurrence_Approval_

Namespace PrefixHOC

Installed PackageHOC

Due DateRule Trigger Date

Notify Assignee

StatusNot Started

PriorityNormal

plus1 days

Description Information

CommentsA new occurrence has been submitted and is awaiting approval. To access this occurrence click on the occurrence ID in the 'related to' field

In edit mode go to Assigned To and do a lookup to the new Opportunity Approval Manager and click Save. Now you are all set for your new Opportunity Approval Manager to start receiving notifications when new occurrences are submitted or edited.

Now repeat this for the Task "Request Approval Requested" -- so that when a recurrence is submitted a task will be created.

Only one person in your organization can be assigned to a task.

What to do when a Partner Staff leaves one organization and goes to another

When a staff member at a partner staff leaves their position, and no longer should have access to their partner portal, you need to perform a couple of steps to do this.

Before deactivating this user, make sure they are not the opportunity coordinator for any opportunities or future occurrences

To do this, create a view of all volunteer opportunities where they are the coordinator.

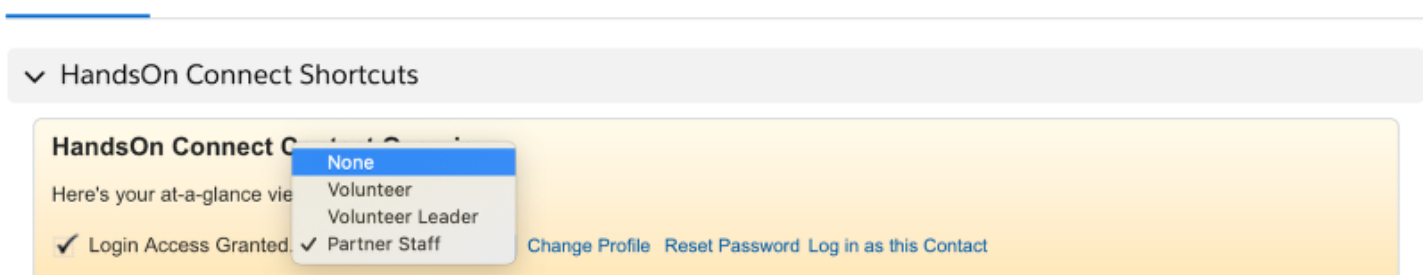
Do the same for all occurrences where they are the coordinator.

Assign someone else to be the Opportunity Coordinator for these opportunities and occurrences so that you don't have volunteers reporting to someone who is no longer with the organization!

NOW that you know this person has no volunteer management responsibilities, you can begin the process of unassociating them with their organization.

Deactivate their portal access for the organization.

Click on 'Change Profile' in the handsON Connect Shortcuts section of their contact, and change their Login Access from "Partner Staff" to "None"



(Optional) Update their Related Organization record:

If you want to keep track of their prior relationship to this organization, look at their related organization record in the related lists and click on "View Relationship".

Contacts > Peter Parker
Related Organizations

1 item • Sorted by Organization Name • Updated a few seconds ago

ORGANIZATION NAME ↑ DIRECT ROLES HOC ACCESS VOLUNTEER MANAGEMENT STATUS

ORGANIZATION NAME	DIRECT	ROLES	HOC ACCESS	VOLUNTEER MANAGEMENT STATUS
1 Troutco	<input checked="" type="checkbox"/>			Active Partner

Add Relationship View Relationship

Uncheck the "Active" box and select a role that describes their prior relationship. (You can customize the roles available to include an item like "Former Employer".

You can fill out the start date and end date to indicate how many years they worked for that employer.

Organization Contact Relationship Information

Organization
Troutco

Contact
Peter Parker

HOC Access
--None--

Roles

Available	Chosen
Opportunity Coordina...	Former Employer
Employer	
Board Member	
Other	

Active
☒

Start Date

End Date

System Information

Created By
9015 HOC Admin, 10/26/2018 9:14 AM

Last Modified By
9015 HOC Admin, 10/26/2018 9:14 AM

Cancel Save

If they are switching to another organization or becoming a volunteer, change the organization they are associated with:

Contact Information

Contact Owner	Paige Van Riper [Change]	Registration Status	Registered
Name	Penelope Partner	Employer	
Middle Name		Organization Name	Individual
Username	paigevanriper+ppartner@gmail.com	Title	Volunteer Manager

Address Information

You can change their account to another organization, or leave the organization name blank if they are just going to be a volunteer. (That will trigger a household to be created for them if you are on the Household Model. Or assign them to the account "Individual" if you are using the 'bucket account' model.

Once you move them to another Organization - you can grant them partner staff profile for THAT organization if desired.

If they are no longer going to use system at all, there's no harm in leaving them associated with their original organization -- but you might want to update their title to "Former Volunteer Manager" and uncheck the 'active' box.

If you DO change them to another organization, you may want to make a comment in chatter for that record, explaining when and why they moved from one organization to the other. You might also want to make a note in the organization record.

If their email address is going to change, update the email address field in the contact record as well.

Managing and Updating Special Email Addresses used by HandsOn Connect

Default Workflow User

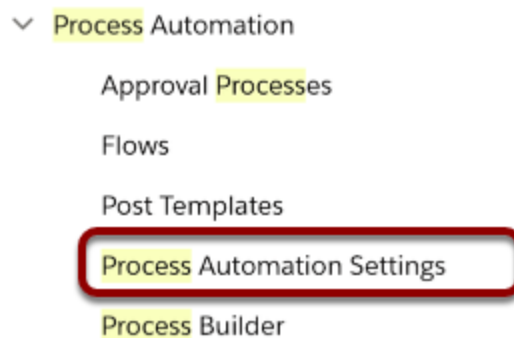
By default, workflows typically use one email address as the sender of email alerts in the system. This is called the default workflow user.

(It's possible to change the sender of any email alert to other users in the system, or to an organization-wide email address but by default, its typically the default workflow user)

If you have a staff person leaving the organization, before you can deactivate their salesforce license you'll need to designate someone else to be the default workflow user.

Default Workflow User

To change the Default Workflow User, go to Setup and search for Process Automation Settings.



Changing Default Workflow User

A screenshot of the Salesforce Setup page for 'Process Automation Settings'. The page has a header with a gear icon and the text 'SETUP Process Automation Settings'. Below the header, the title 'Process Automation Settings' is displayed. The main content area contains a 'Save' button and a 'Cancel' button. Below these buttons, there is a text instruction: 'Specify a default workflow user. Salesforce recommends choosing a user with system administrator privileges.' This is followed by a label 'Default Workflow User' and a text input field containing '9015 HOC Admin'. A red arrow points to the search icon (magnifying glass) next to the input field. Below this, there is another text instruction: 'By default, the email approval sender is the approval submitter. To override the default sender, select an organization-wide email address.' This is followed by a label 'Email Approval Sender' and a dropdown menu showing 'Approval Submitter'. At the bottom, there is a note: 'Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comr'.

Then you just need to do a lookup to the new System Administrator or whomever you want to fill this role and click Save. .

If you want to set workflows to someone other than the default workflow user you can create additional organization-wide email addresses

[Click here for information on how to create organization-wide email addresses."](#)

Organization Wide Email Addresses -- Configuring "Affiliate Address"

In general the Organization Wide Email Addresses are emails that you can make available to System Admins and Staff for use in creating email alerts or sending other emails through HandsOn Connect.

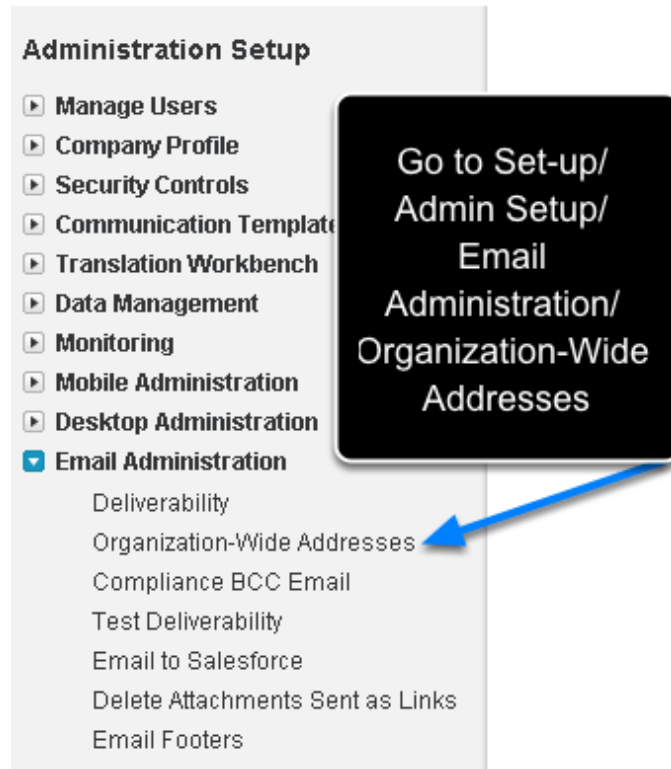
Customers can create as many organization wide email addresses and grant access to various profile to use them. More information on the organization wide email address can be found at salesforce.com Help & Training.

In order to ensure deliverability of emails from the system, many workflows use an organization-wide email address as the sender of a number of emails.

An example of this is the "Waitlisted Opportunity Now Open" email alert.

This email address is generally set for you when you are first onboarded into HandsOn Connect. But make sure that you still have this email address as its been noted in the Control Panel.

Accessing Organization-Wide Email Addresses



"Affiliate Address" is a special organization-wide email address used by the system.

Organization-Wide Email Addresses Add

Actions	Display Name	Email Address	Allowed Profiles	Status
Edit Del	troutco+System_Test@gmail.com		System Administrator , Staff	Verified
Edit Del	Demo Site		Staff , System Administrator	Verification Request Sent 3/15/2011 [Resend]
Edit Del	Affiliate Address		All Profiles	Verified

[Click Edit next to the Affiliate Address name](#)

It was originally required to be named Affiliate Address - but now you can give it any name you choose.

The screenshot shows the 'Organization-Wide Email Address' configuration page. At the top right are 'Save' and 'Save and New' buttons. A black callout box with white text says 'Define the email address you want the default emails to come from.' with an arrow pointing to the 'Email Address' field. The 'Display Name' field contains 'Affiliate Address'. Below these fields are two radio buttons: 'Allow All Profiles to Use this From Address' (selected) and 'Allow Only Selected Profiles to Use the From Address'. A black callout box with white text says 'Display name ...' with an arrow pointing to the 'Display Name' field. Below the radio buttons is a 'Profiles' list box containing: 'Overage Customer Portal Manager Standard', 'Overage Authenticated Website User', 'Overage Customer Portal Manager Custom', 'Volunteer', 'Volunteer Leader', 'Partner Staff', 'System Administrator', 'Volunteer Old', 'Partner Staff Old', and 'Staff'. At the bottom are 'Save', 'Save and New', and 'Cancel' buttons. A black callout box with white text says 'Click Save' with an arrow pointing to the 'Save' button.

The reason to allow all profiles is that if you use this From Address for an email alert that is triggered from the public site by a volunteer (such as notification of Volunteer Sign-ups or Waitlisted Opportunity Now Open) if the Volunteer profile doesn't have access to this From Address then it could send from the current user's email instead.

When you Save the Email Address, you'll receive an email at that address to verify the Organization Wide Email Address



Dear Art Ordoqui,

We have received the following request to add this salesforce.com Organization-Wide Email Address.

New Organization-Wide Email Address: [Redacted]

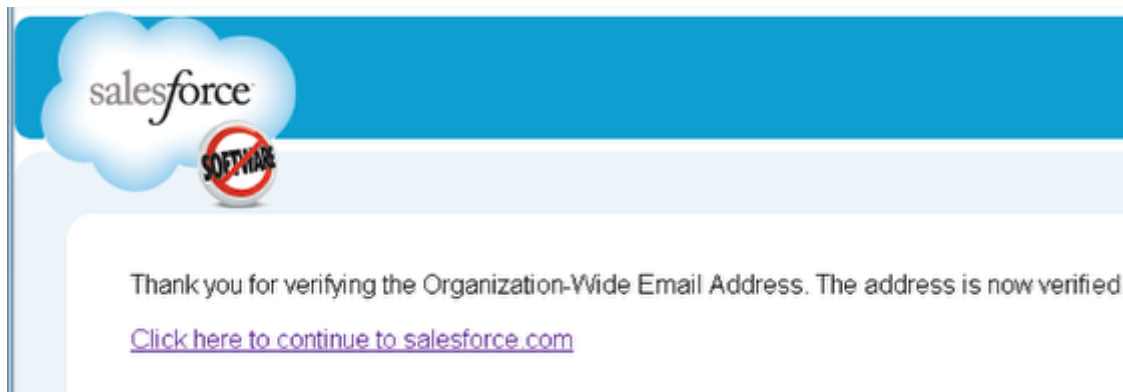
Click this link to confirm this Organization-Wide Email Address: https://na7.salesforce.com/setup/emailid=00DA0000000aAsx&k=UT9DAjkyjD0f3UZWMqTkeMsvJmjSYeNJMMb2w_aJeBbR1k1U3lfT%3D%3D

This link expires 72 hours after the receipt of this message. To confirm your email address, you must click the link.

If you have any questions, please contact your system administrator. If you are already logged in, click the Help link.

Thank you,
salesforce.com

Click on the link to activate...



Organization-Wide Email Addresses Add				
Actions	Display Name	Email Address	Allowed Profiles	Status
Edit Del	troutco+System_Test@gmail.com	[Redacted]	System Administrator , Staff	Verified
Edit Del	Demo Site	[Redacted]	Staff , System Administrator	Verification Request Sent 3/15/2011 [Resend]
Edit Del	Affiliate Address	clientmanager@handsonconnect.org	All Profiles	Verified

Shows as verified

Once you've defined the name of the organization-wide

email address you want to use -- update the control panel

Go to Control Panel and in the System Default section, populate the "Display name of Default Organization-Wide Email Address" with the same display name you are using on the Organization-Wide Email address you defined (or edited) They must match!

System Default Save

Allow one step signup ☒ ?

Default ZIP Code

Include Full occurrences in search ☐

Display Name of Default Organization-Wide Email Address

Enter the DISPLAY NAME of the Organization Wide Email Address you've defined in Setup / Administer / Organization-Wide Addresses that you wish to use as the default sender of HandsOn Connect system-generated emails.

Save

If you started with HandsOn Connect prior to May, 2016

Check that you've updated all the email alerts in your system as instructed in the [May 2016 Release Notes](#). (See Item 1 in this post):

Creating new organization-wide email addresses

You can add additional organization-wide email addresses if desired.

These become available to use as FROM addresses for email alerts, or for any manual emails sent from Salesforce.

You can control who can use the 'from' address by restricting the address to certain profiles.

Creating a new Organization-Wide Email Address

Organization-Wide Email Addresses

[Help for this Page](#)

An organization-wide email address associates a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address.

Organization-Wide Email Addresses					
<div>Add</div>					
Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date
Edit Del	troutco+System_Test@gmail.com	troutco+system_wide@gmail.com	System Administrator , Staff	Verified	3/7/2011
Edit Del	Demo Site	info@handsonconnect.org	Staff , System Administrator	Verification Request Sent 3/15/2011 [Resend]	3/15/2011
Edit Del	Affiliate Address	clientmanager@handsonconnect.org	All Profiles	Verified	6/2/2011
<div>Add</div>					

Go to Setup / Admin Setup / Email Administration / Organization-Wide Addresses

Click on the **ADD** button

Edit Organization-Wide Email Addresses

[Help for this Page](#)

An organization-wide email address associates a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address.

SaveSave and NewCancel

Organization-Wide Email Address

= Required Information

Display Name

HandsOn Twin Cities

Email Address

info@handsontwinciti

☐ Allow All Profiles to Use this From Address

☒ Allow Only Selected Profiles to Use the From Address

Profiles

Overage Customer Portal Manager Standard

Overage Authenticated Website User

Overage Customer Portal Manager Custom

Volunteer

Volunteer Leader

Partner Staff

System Administrator

Volunteer Old

Partner Staff Old

Staff

SaveSave and NewCancel

You can choose a display name (what the address will appear as in picklists) and the email address you wish to use:

Make sure its a valid email address for your organization. Examples: info@handsonyou.org
help@handsonyou.org

Optionally you can limit the use of this address to users with a specific profile.

Limiting to staff and system administrator makes sense for manual emails -- but if you wish to use them for workflows its best to select "Allow All Profiles to use..." as the workflow may be initiated by someone using the public site or portals.

Save... and you will be sent a verification email to activate this email address and make it available for system use.

Working with Email

How to update your email templates

HandsOn Connect provides the flexibility to allow users to customize the email alerts sent out by the system, and the email templates sent out by those alerts and the workflows that control them.

For this reason - when updates or bug fixes become available for email templates, correcting merge fields and improving on the messaging sent out by the system emails -- system administrators need to manually update their email templates.

If you've not customized your email templates in any way -- then its primarily a matter of replacing the contents of the exiting email template, with the 'new' content.

If you have customized your email template text in any way -- you will want to selectively review new email templates, and decide what content and merge fields you need to update.

Your System Administrator can edit the HandsOn Connect email templates to personalize them for your organization.

New Template						
Action	Email Template Name	Template Type	Available For Use	Description	Owner	Last Modified Date
Edit Del	Coordinator Grant Portal Access	HTML	✓	This email notify the affiliate that they need to grant portal access to the new Volunteer Coordinator	HAdmin	1/11/2012
Edit Del	Default email sent to occurrence volunteers	Text	✓	Template for VL to email his members from the occurrence page. Modified by the VL before team VL it.	rsing	1/11/2012
Edit Del	Login Information	Text	✓	this mail is sent to the Agency with the login details to access the system	rsing	1/11/2012
Edit Del	New Organization Registered	HTML	✓	Sent after agency sign up.	rsing	1/11/2012

Go to **Setup / Administration Setup / Communication Templates / Email Templates** and look in the folder **HOC Email Templates**.

You should see an email template that matches each of the ones found in the zipped archive. Select your first email template and click on EDIT.

Note that some of the emails are of template type HTML and some are of template type Text.

Updating the HTML templates takes an extra step compared with editing one that is in text only.

Click on EDIT next to an email template name


Edit HTML Email Template

Coordinator Grant Portal Access (Managed)

Use your company's existing Letterhead and select one of Salesforce's pre-defined Email Layout options to create your HTML email template.

Give your template a name and description and place it in the appropriate folder. Note that the Description field is for internal use only.

Once you have finished creating your HTML email template, check the "Available For Use" box to make this template available to your users.

 This Email Template is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Email Template Edit

SaveSave & NewCancel

Email Template Information

Folder	HOC Email Templates
Available For Use	<input checked="" type="checkbox"/>
Email Template Name	Coordinator Grant Por
Template Unique Name	Coordinator_Grant_Po i
Namespace Prefix	HOC
Installed Package	HOC
Letterhead	HOC Letterhead
Email Layout	Free Form Letter
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)
Description	This email notify the affiliate that they need to grant portal acce

SaveSave & NewCancel

Update the email description if your new version has an improved description. (Feel free to update it further if you want to use your own language to make it clearer to you what the email template does).

SAVE the change.

NOTE: We do not recommend renaming the email template names. It may create problems with the email alerts and workflows that use them, requiring further updating on your part.

To edit the CONTENT of the email, click on the email template name itself:

HOC Email Templates

Below is a list of all your email templates in the folder selected. Click the new button to create a new text, HTML, Custom, or Visualforce email template. You can use these emails for mass emails, only text, HTML, and Custom templates may be used.

Folder: HOC Email Templates [Edit](#) | [Create New Folder](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

[New Template](#)

Action	Email Template Name	Template Type	Available For Use	Description
Edit Del	Coordinator Grant Portal Access	HTML	✓	This email notifies the affiliate that they need to grant portal access to the new Organization Contact
Edit Del	Default email sent to occurrence volunteers	Text	✓	Template for VL to email his members from the occurrence page. Modified by the VL before team VL it.

Then click on the "Edit HTML" button.

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

Email Template [Send Test and Verify Merge Fields](#)

Subject {!Account.Name} has added a new organization contact

HTML Preview

Sign Up & Serve

{!Account.Name} has requested that the following person be granted access to the organization's account at
{!Account.HOC__HOC_Domain_Name__c}

MOST of the emails will be of type html - which means you'll have to edit both the HTML version and the Text Version, as we'll demonstrate here.

If its a 'text only" template -- you'll only have to update the 'text version"

Edit the body of the email by copying the text from the .txt file, and by pasting the new content over the existing content.

The screenshot shows the email editor interface. At the top is the 'Formatting Controls' bar with options for Font, Size, and various text formatting tools. Below this is the 'Available Merge Fields' section, which includes a 'Select Field Type' dropdown (set to 'Contact Fields'), a 'Select Field' dropdown, and a 'Copy Merge Field Value' input field. The 'HTML Email Content' section shows a 'Subject' line with the text '{!Account.Name} has added a new organization contact'. The main content area displays a preview of the email body, which includes a 'Sign Up & Serve' header, a request for account access, new contact information, and a statement about review and approval.

OR: If you have customized your emails and want to retain some of your prior customization -- just edit the sections that need to be updated. Pay particular attention to the corrected merge fields.

FIRST: Update the Subject Line (this isn't necessary if the subject line hasn't changed)

SECOND: Update the Content of the email. Select ALL of the content and set the font to Arial and the size to 9 point. (This is the default -- if you want bigger text in all your emails you can choose to do so).

OPTIONAL: Click the PREVIEW button to see what the email will look like (font sizes, etc). The preview will still be showing you the merge fields however, this just shows you how it will look generally.

If you are satisfied with the look of the email:

Then click SAVE

Note: If you are pasting selected text into an existing email template, you MAY find that your pasted text has a different font size than the rest of the content.

To correct this -- after you are through editing, select ALL of the email's content, and use the Font and Size picklists in the Formatting Controls and set everything to Arial 9 point.

Update the Text version also - for users who cannot view html-based emails


Created By Z002 HOC Admin, 1/11/2012 2:01 PM

Edit Properties Edit HTML Version **Edit Text Version** Delete Clone

Email Template Send Test and Verify Merge Fields

Subject {!Account.Name} has added a new organization contact

HTML Preview



Click on "Edit Text Version"

You already have the text version conveniently on your clipboard. So just paste it in!

Click Save.

If you have customized the template and changed the text (or made selected updates on your email template) - Use the "Copy text from HTML Version" button.

Save Cancel **Copy text from HTML version**

Text-Only Email Content

Subject	{!Account.Name} has added a new organization contact
Text Body	<p>{!Account.Name} has requested that the following person be granted access to the organization's account at {!Account.HOC__HOC_Domain_Name__c}</p> <p>New Contact's Information:</p> <p>{!Contact.Name} {!Contact.Email} {!Contact.HomePhone}</p> <p>This request will be reviewed by {!Organization.Name}. Once access has been granted by the {!Organization.Name} an email approving the new contact and providing a username and temporary password will be sent.</p>

You'll get a warning the all existing text will be overwritten.

In many cases, you'll find that some additional spaces are placed between lines. Quickly remove the extra spaces so that the text version looks good. (Not waste much time on this though, most people view email as html so few will ever see the text versions.)

Click SAVE.

If you want to test the email template further, you can then choose to [Send a Test and Verify Merge Fields](#).

Testing Email Templates and Verifying Merge Fields

The easiest way to test the content and merge fields in your email templates is to simulate the conditions under which they are sent from the public site using a test account. That'll absolutely show you what happens.

Salesforce does provide a way to test from the email template interface -- but it can be a little tricky. Here's what you need to know.

When viewing the detail page of an email template, click on the "Send Test and Verify Merge Fields" button


Created By Ruchie Singh, 1/11/2012 2:01 PM Modified By Z002 HOC Admin, 9/15/2012

Edit Properties Edit HTML Version Edit Text Version Delete Clone

Email Template Send Test and Verify Merge Fields

Subject {{{Organization.Name}}} {{{HOC__Connection__c.HOC__Contact__c}}} has removed themselves from the opportunity {{{HOC__Connection__c.HOC__Volunteer__Opportunity__c}}}

HTML Preview



Before doing so however, take a look at the merge fields that are being used in the template.

Think about what workflow is triggering the email alert, and what object that workflow is build around.

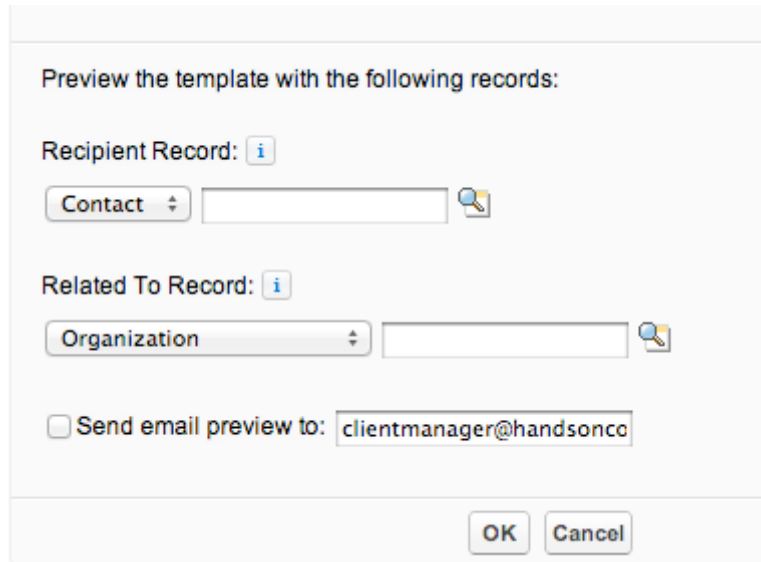
Let's try testing the email template "Notification of Volunteer Removals"

Before clicking on the button -- consider what triggers this email.

It is sent when an update is made to the Connection Record. The update is made by a contact in the system (the volunteer who has removed themselves).


To properly test this - you need to find a connection record (and its contact), where this would have taken place. Otherwise there won't be proper data to merge.

What you see when you click on the "Send Test and Verify Merge Fields" button




Preview the template with the following records:

Recipient Record: [i](#)

Contact 

Related To Record: [i](#)

Organization 

☐ Send email preview to:

OK Cancel

You are asked for 3 things here:

- 1) Who would be receiving the email. In this case, that would be the Opportunity Coordinator responsible for the opportunity the volunteer has just removed themselves from. So look up THEIR contact record.
- 2) Related to Record: This is what confuses most people. You don't want to look up an organization here. Instead you need to drop down the picklist and select a record of type "Connection". This should be a connection in your data where someone is in status removed.
- 3) If you want to receive the actual email (in addition to the preview you'll see on screen), Click the 'send email preview to" button and put in your email address.

Here's the correct info for me to send a test that will fill in all the merge fields!

Preview Template

<https://na14.salesforce.com/p/email/template/EmailTemplatePreview?...>

Preview the template with the following records:

Recipient Record: [i](#)

Contact Art Trout

Related To Record: [i](#)

Connection CO-000168

☒ Send email preview to: troutco@gmail.com

OK Cancel

When I click OK, I see an html preview appear:

**Sign Up
& Serve**

A volunteer has been removed.

Opportunity: Veterans Day Parade
9/28/2012 6:00 AM - 9/28/2012 11:00 AM

Currently registered: 2 volunteers confirmed for this occurrence
Min/Max: 1 / 100
Occurrence Link: <http://www.signupandserve.org/a0Cd0000007Pbu5>
(Please note: You must log in to see Occurrence information)

Volunteer Information:
Valerie Volunteer
323-123-1234
troutco+vol2002@gmail.com

Thank you,

Sign Up and Serve

For Sign Up and Serve Use Only: <https://na14.salesforce.com/a0Cd0000007Pbu5>

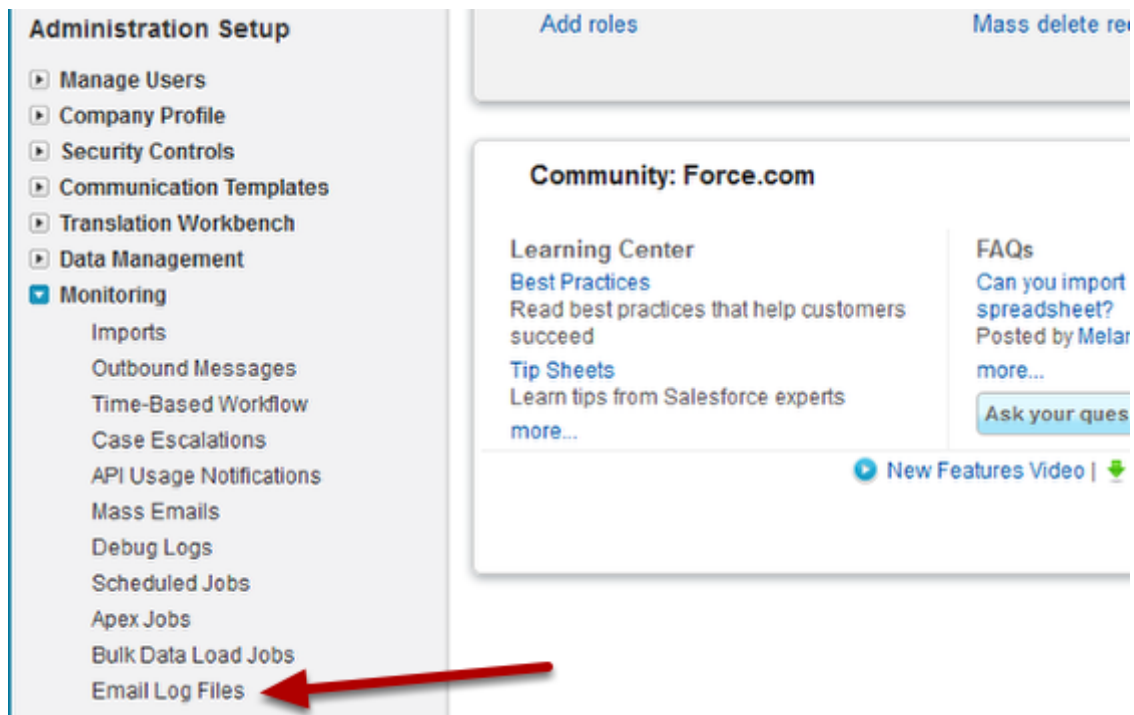
Notice, all the merge fields are filled in.

I'll also receive an email version of it if desired.

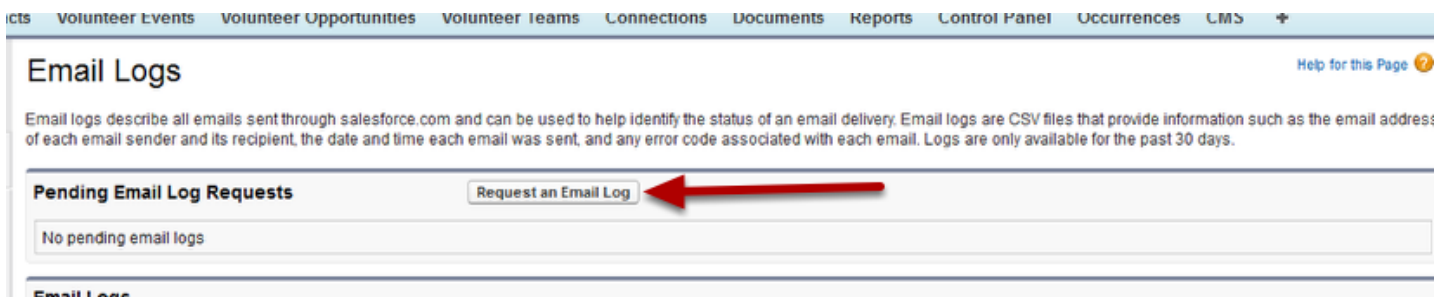
Note: There are a few email templates where several objects are involved in producing all the necessary merge fields. These aren't controlled by workflows, but are triggered by apex triggers. For these, the only way to test that all merge fields from a range of objects will work - is to simulate the conditions of the email from the public site. (That's because you can't pull info from two different objects via the native salesforce "Send Test and Verify Merge Fields".

Email Logs in Salesforce

How many times have you had a volunteer tell you they never received a particular email when you're pretty darn sure it was sent? Ever wished you could check? Well you can. Salesforce allows you to run a log of emails sent from the system. Email logs are CSV files that contain information about all email sent through Salesforce over the last 30 days. Read on to learn how to run an email log.



Go to Setup/Administration Setup/Monitoring and click on Email Log Files.



Then click on Request an Email log.

Email Log Request

[Help for this Page](#)

The requested log files will be returned as ZIP file containing a comma-separated CSV. Log files are limited to a length of 500,000 lines. Files greater than 64,000 lines are not supported by Excel versions prior to 2007. To view additional lines, submit another log request with adjusted parameters.

Log Data Options

= Required Information

The difference between the start time and end time of your request must be, at most, seven days. For any additional time periods, you should request another query. Logs are only available for emails that were processed within the past 30 days (12/21/2011 3:42 PM (EST) through 1/20/2012 3:42 PM (EST)).

Start Time 1/13/2012 3:42 PM

End Time 1/20/2012 3:42 PM

Include only emails that are addressed to or from:

Include All Email Addresses

(Note: Email addresses or Domain Names should be comma delimited.)

Delivery Notifications

Notification Recipients:

pvanriper@pointsoflight.org

Submit Request

Cancel

You will then specify the start date and time and end date and time for the range you wish to run. If you are looking to see if a particular contact was sent an email you would put the contact's email address in the next field and finally specify what email address you want to be notified at when the log is ready. Then click submit request.

From: no-reply@salesforce.com on behalf of Paige Van Riper <pvanriper@pointsoflight.org>
To: Paige Van Riper
Cc:
Subject: Your email log search has completed

The email log search request submitted on 2012-01-20 20:46:38 has finished successfully.

To see more details about the request and to download the log file, click here: <https://na7.salesforce.com/ui/core/email/logs/EmailLogSearchOverview>

Criteria:

Status: Success

Start Time: 2012-01-13 20:42:00

End Time: 2012-01-20 20:42:00

Included Emails: All email addresses

Size of log: 176 lines

Thank you,
Salesforce

When Salesforce has finished running the log you will receive an email at the address you specified in the last step letting you know your log is ready and giving you a link to get to it.

Email Logs

[Help for this Page](#)

Email logs describe all emails sent through salesforce.com and can be used to help identify the status of an email delivery. Email logs are CSV files that provide information such as the email address of each email sender and its recipient, the date and time each email was sent, and any error code associated with each email. Logs are only available for the past 30 days.

Pending Email Log Requests
No pending email logs

[Request an Email Log](#)

Email Logs

Action	Request Description	Size	Number of Records	Requesting User	Requested Date
Download (.zip) Del	All emails between 1/13/2012, 3:42 PM - 1/20/2012, 3:42 PM	7KB	176	palqedemo@pointsoflight.org	1/20/2012 3:46 PM
Download (.zip) Del	All emails between 9/15/2011, 4:39 PM - 9/16/2011, 4:39 PM	1565 bytes	28	palqedemo@pointsoflight.org	9/16/2011 4:39 PM
Download (.zip) Del	All emails between 9/15/2011, 4:28 PM - 9/16/2011, 4:28 PM	1118 bytes	16	palqedemo@pointsoflight.org	9/16/2011 4:28 PM

The link will take you to a list of all email logs. Select the one you created and click on Download.

A	B	C	D	E	F	G	H	I	J	K	L	M
Date Time	Internal Message ID	Mail Event	Recipient	Sender	Remote Host	Bytes Transferred	Salesforce.com User	Message ID	Header	Retry Count	Seconds In Delivery Stage	Relay Address
Salesforce could only retrieve a partial result for your email search. It is likely that only test emails are unavailable. If the search log is missing further expected results, contact your email administration or Salesforce.												
6D/8D-18787-4BE331F	R		troutco+training_1	clientmanager=handsor	10.236.70.52	8646	005A00000000be5z	<284301441.2226.1326661300308.JavaMail.sfdc@na7-app1-15-was.ops		0	0.020908	
6D/8D-18787-4BE331F	D		troutco+training_1	clientmanager=handsor	10.228.39.18	8646	005A00000000be5z	<284301441.2226.1326661300308.JavaMail.sfdc@na7-app1-15-was.ops		0	0.020908	
18/13-06166-413B01F	R		davis.kirby+demo	clientmanager=handsor	10.236.9.131	8933	005A00000001cxme	<1888797230.67751.1326494484892.JavaMail.sfdc@na7-app1-5-was.ops		0	0.43877	
18/13-06166-413B01F	D		davis.kirby+demo	clientmanager=handsor	74.125.91.27	8933	005A00000001cxme	<1888797230.67751.1326494484892.JavaMail.sfdc@na7-app1-5-was.ops		0	0.43877	
7A/E2-06166-C1B911F	R		troutco+training_1	clientmanager=handsor	10.237.9.130	10248	005A00000000be5z	<401348491.20350.1326553884130.JavaMail.sfdc@na7-app1-1-was.ops		0	1.468243	
7A/E2-06166-C1B911F	D		troutco+training_1	clientmanager=handsor	74.125.91.26	10248	005A00000000be5z	<401348491.20350.1326553884130.JavaMail.sfdc@na7-app1-1-was.ops		0	1.468243	
BF/1C-12076-EC0331F	R		artohoc+abbyordc	clientmanager=handsor	10.237.9.131	10221	005A00000015GCT	<1355764981.797.1326657742416.JavaMail.sfdc@na7-app1-4-was.ops		0	1.104635	
BF/1C-12076-EC0331F	D		artohoc+abbyordc	clientmanager=handsor	74.125.93.27	10221	005A00000015GCT	<1355764981.797.1326657742416.JavaMail.sfdc@na7-app1-4-was.ops		0	1.104635	
9B/F3-19899-6F7541F	R		troutco+training_1	clientmanager=handsor	10.237.9.130	8959	005A000000015Vee	<1339379735.13169.1326733302756.JavaMail.sfdc@na7-app1-11-was.ops		0	0.961227	
9B/F3-19899-6F7541F	D		troutco+training_1	clientmanager=handsor	74.125.93.26	8959	005A000000015Vee	<1339379735.13169.1326733302756.JavaMail.sfdc@na7-app1-11-was.ops		0	0.961227	
7E/F1-06166-DC9A51F	R		troutco+training_1	clientmanager=handsor	10.236.9.130	8968	005A000000015Vee	<1095233146.39965.1326819789190.JavaMail.sfdc@na7-app1-1-was.ops		0	0.012714	
CF/3B-23630-B51F21F	R		troutco+training_1	clientmanager=handsor	10.236.70.51	8638	005A00000000be5z	<2108682202.939.1326641499079.JavaMail.sfdc@na7-app1-14-was.ops		0	0.012714	
CF/3B-23630-B51F21F	D		troutco+training_1	clientmanager=handsor	10.228.39.2	8638	005A00000000be5z	<2108682202.939.1326641499079.JavaMail.sfdc@na7-app1-14-was.ops		0	0.012714	

When you download the CSV file it will look like this. It contains the date and time the email was sent, an internal message ID, recipient and sender's email addresses, the delivery status of the email and any error codes associated with the email. You can use the error codes to troubleshoot email issues.

Mass Emailing in Salesforce

Before you start: Create an email Template that has the message you want to send.

[Click here for instructions on how to create an email template.](#)

Step 1: Go to Setup / Admin Setup / Manage Users / Mass Email Users and select or create a view

The screenshot shows the Salesforce 'Mass Email' setup page, specifically the 'Recipient Selection' step. The left sidebar contains navigation links: 'Force.com Home', 'System Overview', 'Personal Setup' (with sub-links for My Personal Information, Email, Import, Desktop Integration, My Chatter Settings, and My Social Organizations and Contacts), 'App Setup' (with sub-links for Customize, Create, Develop, Deploy, Schema Builder, Installed Packages, AppExchange Marketplace, and Critical Updates), and 'Administration Setup' (with sub-links for Manage Users, Users, Mass Email Users, and Roles). The 'Mass Email Users' link is highlighted with a red box. The main content area is titled 'Mass Email Recipient Selection' and shows 'Step 1 of 4: Specify the recipients to include'. It instructs the user to 'Select a view below that contains the recipients to be included in this email.' A dropdown menu shows 'Volunteer Leader Users' with a 'Go!' button next to it. A 'Create New View' link is highlighted with a red box. 'Next' and 'Cancel' buttons are visible at the bottom right of the step.

If you don't already have a view created from a prior mass email - click on Create New View.

Create a view in the usual way

Step 1. Enter View Name

View Name: Partner Staff
View Unique Name: Partner_Staff

Step 2. Specify Filter Criteria

Filter By Additional Fields (Optional):

Field	Operator	Value	
Profile	equals	Partner Staff	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Add Filter Logic...

Step 3. Select Fields to Display

Available Fields		Selected Fields	
Self-Registered via Customer Portal	Add Remove	Full Name	Top Up Down Bottom
Marketing User		Username	
Offline User		Last Login	
Sales Anywhere User		Role	
Salesforce CRM Content User		Active	
Storage Used (KB)		Profile	
Delegated Approver			
Created By			
Created By Alias			
Created Date			
Start of Day			
End of Day			
Password Expiration Date			
Time Zone			
Manager			

Step 4. Restrict Visibility

☐ Visible only to me
☐ Visible to all users (includes partner and customer portal users)
☒ Visible to certain groups of users

Search: Public Groups for: Find

Your search returned more than 100 rows. Only the first 100 are shown.

Available for Sharing: Group: AmeriCorps, Group: Art in Mass

Shared To: All Internal Users

[See this post on how to create views.](#)

Save your view. It will now appear in the picklist of views in step 1, preselected for you.

Step 1. Specify the recipients to include Step 1 of 4

Select a view below that contains the recipients to be included in this email.

View: Partner Staff Go! Edit | Create New View

<Previous Page | Next Page>

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

Available 178 in view

Full Name	Username	Last Login	Role	Active	Profile
56757, 6575	57657567@gmail.com		XYZ Customer User	✓	Partner Staff
bahe_c	tito1@hotmail.com		org test Customer User	✓	Partner Staff

Note... Within the view you can optionally unselect individuals, further refining who your mass email is sent to. (Everyone in the view - or just some of the people in the view). Click on the Next Button.

Step 2: Select which of your email templates you wish to send

Mass Email Video Demo | Help for this Page

Template Selection

Step 2. Select an email template Step 2 of 4

[Previous](#) [Next](#) [Cancel](#)

Please select an email template to use. To create a new template, you must exit this mass email process and create the new template in your personal setup section.

Folder: My Personal Email Templates

Preview	Name	Type	Description
Preview	<input checked="" type="radio"/> Follow Up to Partner Application	HTML	Sent to the partner organization after they register on the public site
Preview	<input type="radio"/> HB-Day Larry	HTML	To sent out on birthdays each month
Preview	<input type="radio"/> Missing Birthday Notification	HTML	Sending to volunteers who are missing birthdate information
Preview	<input type="radio"/> My email	HTML	
Preview	<input type="radio"/> Thanks	HTML	

Click Next.

Step 3: Give your email a name, and schedule it.

Mass Email Video Demo | Help for this Page

Confirmation

Step 3. Review and confirm Step 3 of 4

[Previous](#) [Send](#) [Cancel](#)

You currently have 79 recipient(s) selected to receive this email.

Processing Options I = Required Information

BCC me on one message ☒

Mass Email Name Partner Annual Follo

Delivery Options

☒ Send now

☐ Schedule for delivery on 4/2/2013 2:50 PM Time Zone (GMT-04:00) Eastern Daylight Time (America/New_York)

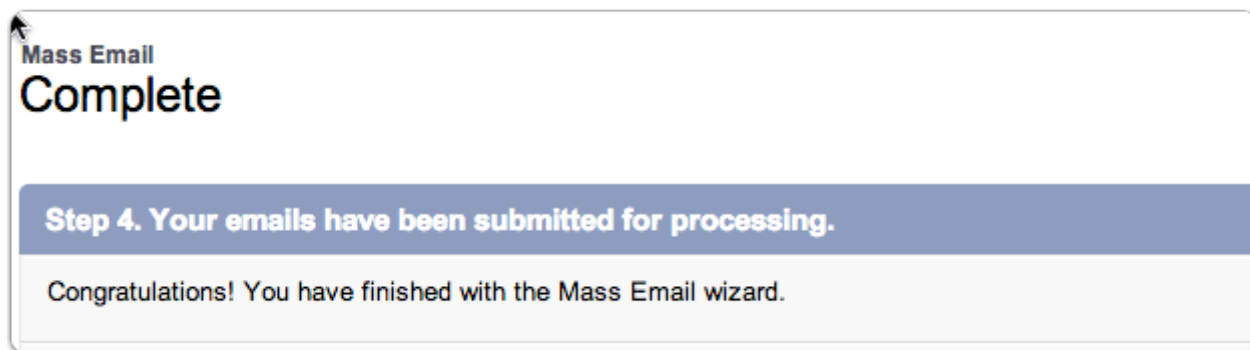
[Previous](#) [Send](#) [Cancel](#)

You have the option of BCCing yourself on one message so you know its gone out.

You can schedule the delivery for now - or a future date and time.

Then click SEND.

Step 4: Success Page



Enabling Advanced Features

Enabling ability for one contact to serve as partner staff for multiple organizations

HOC 3.0, (March 2018 release and later) supports the ability to allow one contact to log into the sharing portal as partner staff for multiple organizations. Before you can use this ability, the System Administrator needs to perform the following speed up to their system.

NOTE: Creating opportunities that this contact will manage (for organizations other than the organization their contact is directly connected to) must be done in the sharing portal itself. The volunteer opportunity wizard does not support administratively making a contact opportunity coordinator for multiple organizations.

1. First ensure that profiles have access to the field "HOC Access"

Go to Setup / Profiles and for the System Admin Profile, go to "object settings" and select the object 'Account Contact Relationships'

Check that the system admin profile has both Read and Edit Access to the field HOC Access. If it doesn't grant these permissions.

The screenshot shows the Salesforce Setup interface for the 'System Administrator' profile. The 'Object Settings' tab is selected for the 'Account Contact Relationships' object. The 'Field Permissions' section is expanded, showing a table of fields and their access permissions. The 'HOC Access' field is highlighted with a red box, indicating it has both Read and Edit Access checked.

Field Name	Read Access	Edit Access
Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Direct	<input checked="" type="checkbox"/>	<input type="checkbox"/>
End Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HOC Access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Organization	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Roles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Start Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Go to the profile: "Staff" and repeat. This allows both Staff and System administrators to use the picklist values in the HOC Access field, and it will be visible on their page layouts.

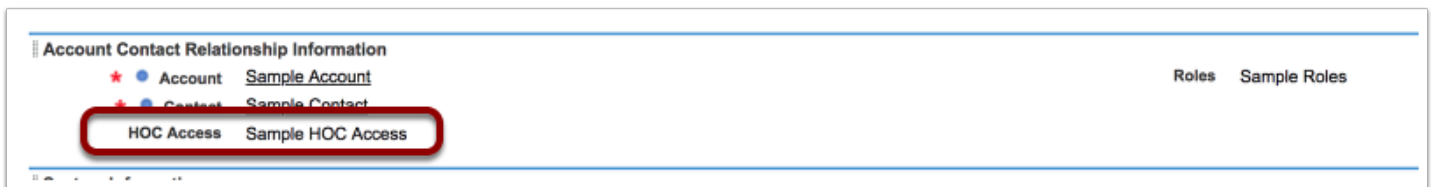
The "Direct" checkbox indicates that this contact has this organization as their main organization. This will be the organization they originally had partner staff access for.

[See this post for details on how to add additional organizations for a contact to manage.](#)

2. Update page layout for the object Account Contact Relationship

Setup / Account Contact Relationships / Page Layouts

This may already have been done depending on whether it came from the .dot. But check that the field **HOC Access** is added to the page layout "Account Contact Relationship Layout" as it won't be there for custom installs into existing instances of SF.



3. Update Page Layouts for accounts and contacts to add a new related list:

A. Update NonProfit Account Page Layouts in Use

- Add the **Related Contacts** related list to the nonprofit account page layouts in use. It should be added as the first related list on the layout.
 - Set the fields in the related list as shown here:

Related List Properties - Related Contacts

[Help](#)

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields		Selected Fields
ARS Transaction ID	Add Remove	Contact Name
Accepts Invitations		Organization Name
Active		Direct
Address Override		Title
Address Verification Status		HOC Access
Age		Roles
Allow Customer Portal Self-Registration		Profile Name
Alternate Email		

Sort By: --Default--

☒ Ascending
☐ Descending

Apply column information to other page layouts:

Buttons

! Note: The field "organization Name" might appear as "Account Name" in your instance of SF.

B. Remove the Contacts related list from the page layout

(it's no longer needed, as all your contacts for the organization will appear in the 'related contacts' list.

C. Update Contact Page Layouts in use:

- Update the contact page layout(s) in use by your organization, by adding the "Related Organizations" related list. Make it the first related list on the page layout. Set up the visible fields as shown below:

Related List Properties - Related Accounts

Help ?

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields

- Site3.0 CreatedBy
- Site3.0 ModifiedBy
- Sponsor Group
- Start Date
- Syndication Logo URL
- Ticker Symbol
- Type
- Volunteer Leader Approval Manager

Selected Fields

- Organization Name
- Direct
- HOC Access
- Roles
- Status

Sort By: --Default--

☒ Ascending

☐ Descending

Buttons

OK Cancel Revert to Defaults

Your related list will now look like this:

Related Organizations					
Add Relationship					
Action	Account Name	Direct	HOC Access	Roles	Status
Edit View Rel Troubleshoot	Troubleshoot	✓			Active Partner

4. (Optional but recommended) Update the picklist values in the field Roles in the Account Contact Relationship object.

i The "Roles" field allows you to add additional information about what role the contact plays with an organization. HandsOn Connect uses the role names "Primary Contact" and "Volunteer Coordinator" to identify certain contacts, so you may wish to add them to your related list.

You can also optionally add other role identifiers that are useful to you for keeping track of a contact's relationship to an organization. Here's how to take advantage of this field if you want to use it. (Note: It is not required to do this, but its a nice thing to have :-)

Go to Setup / Account Contact Relationship / Fields and select the field "Roles".

It has default picklist values used by the sales process, but not particularly useful for managing nonprofit organizations.

A). Add two new values to the list:

- Primary Contact
- Volunteer Coordinator

B) Optionally deactivate other values not useful to your organization.

C).Optionally add additional picklist values that may be useful to your organization for keeping track of indirect relationships for your contacts. (Example: Board Member)

Roles

Back to Account Contact Relationship Fields

Edit Set Field-Level Security View Field Accessibility

Field Information

Field Label	Roles	Field Name	Roles
Data Type	Picklist (Multi-Select)		
Help Text			

Validation Rules New Validation

No validation rules defined.

Roles Picklist Values New Reorder Replace Printable View Roles Picklist 1

Action	Values	API Name	Default	Modified By
Edit Del Deactivate	Primary Contact	Primary Contact	<input type="checkbox"/>	9013.HOC ADMIN, 12/14/2017 12:57 PM
Edit Del Deactivate	Volunteer Coordinator	Volunteer Coordinator	<input type="checkbox"/>	9013.HOC ADMIN, 12/14/2017 12:57 PM
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	9013.HOC ADMIN, 12/14/2017 12:59 PM

Inactive Values

Action	Values	API Name	Modified By
Del Activate	Economic Decision Maker	Economic Decision Maker	9013.HOC ADMIN, 12/14/2017 12:58 PM
Del Activate	Executive Sponsor	Executive Sponsor	9013.HOC ADMIN, 12/14/2017 12:57 PM
Del Activate	Decision Maker	Decision Maker	9013.HOC ADMIN, 12/14/2017 12:58 PM
Del Activate	Economic Buyer	Economic Buyer	9013.HOC ADMIN, 12/14/2017 12:58 PM
Del Activate	Technical Buyer	Technical Buyer	9013.HOC ADMIN, 12/14/2017 12:57 PM
Del Activate	Influencer	Influencer	9013.HOC ADMIN, 12/14/2017 12:57 PM
Del Activate	Evaluator	Evaluator	9013.HOC ADMIN, 12/14/2017 12:58 PM
Del Activate	Business User	Business User	9013.HOC ADMIN, 12/14/2017 12:59 PM
Del Activate	Opportunity Coordinator	Opportunity Coordinator	9013.HOC ADMIN, 2/1/2018 2:33 PM

Using the Roles field is strictly optional. But can be useful to identify who is the Primary Contact for a related organization and who is the Volunteer Coordinator.


How do you use these new related lists to grant access to a contact to manage additional organizations in the sharing portal?

[See this article for how to create additional organizational relationships for contacts, and how to grant the contact Partner Staff access for additional organizations.](#)

Enabling Advanced Occurrence Options

This article describes how to enable the following advanced options for occurrences:

- Include Pending for Max Attendance
- Maximum Waitlist
- Turn off Waitlist
- Turn off Teams
- Turn off Individual Signups
- Allow Reservations of Anonymous Slots
- Requires Invitation From / Invitation Code

 These advanced options can also be enabled at the Volunteer Opportunity level (which means the settings affect all Occurrences), and at the Volunteer Event level. (which would make them apply to all volunteer opportunities and occurrences that are part of the event).

Update profiles to allow read and edit access to the fields you wish to make available

Some of these fields may already be enabled for system admin and staff... but go to all the profiles that are using HandsOn Connect, and ensure that they have read and write access to each of these fields you wish to make available for use.

Setup / Profile / choose the profile, and then choose the object(s) you wish to enable these features for. (They are available to add for occurrences, volunteers opportunities and Volunteer Events.

Add the field(s) to the Page Layout

Select the occurrence page layout(s) you are using for System Admin and Staff,. You'll then want to add new fields to the page layout.

Extending Advanced Occurrence Options to the Volunteer Opportunity Page Layout

💡 While often these 'advanced occurrence options' might be applied only to one or two occurrences, what if you want ALL occurrences of the opportunity to automatically 'turn off teams' or 'allow reservations of anonymous slots'? If you don't want to have to set these settings for each occurrence of an opportunity - you can also apply these fields at the Volunteer Opportunity Level. When you do this - ALL occurrences of that opportunity will have that advanced setting applied to them. You won't see this in the occurrence record - but if its set at the Volunteer Opportunity level - then all occurrences of that Opportunity are affected by the setting, and there's no need to worry about the advanced settings in the individual occurrences. Here's how to update the Volunteer Opportunity Layout IF you want any of these advanced options to apply to all the opportunities occurrences:

Add a new section to the Volunteer Opportunity Page Layout you are using:

Label this section "Advanced Options (Affects all existing and new occurrences).

You'll find the same fields available in the Volunteer Opportunity Object. Just add them to this section in your page layout. Add as many of these fields as you wish to use.

The volunteer opportunity layout would then look like this:

The screenshot displays a user interface for a 'Volunteer Opportunity' page layout. A red rectangular box highlights a section titled 'Advanced Options'. This section contains several configuration fields, each with an information icon (i) and a checkbox or text input. The fields are arranged in two columns. The left column includes 'Include Pending for Max Attendance', 'Maximum Waitlist', and 'Allow Reservation of Anonymous Slots'. The right column includes 'Turn off Teams', 'Turn Off Individual Sign Up', 'Turn off Waitlist', and 'Grouped Occurrences' (which has a text input field containing 'GO-0004').

Advanced Options	
Include Pending for Max Attendance	Turn off Teams
Maximum Waitlist	Turn Off Individual Sign Up
Allow Reservation of Anonymous Slots	Turn off Waitlist
	Grouped Occurrences: GO-0004

Updating any of these fields in the volunteer opportunity record will put those settings into affect for all that opportunity's occurrences!

Allowing Invitation Codes at the Occurrence Level (private occurrences)

Another advanced option is the ability to add invitation code at the Occurrence Level (instead of making all occurrences of a volunteer opportunity require an invitation code).

For information on adding invitation codes to Occurrences see [Release Notes, October 2019](#)

▼ Is this Occurrence Private?

Requires Invitation From

Invitation Code

Enabling 'Allow team captains to reserve slots for unnamed (anonymous) team members'

This optional feature allows team captains to reserve slots in occurrences of volunteer opportunities for 'unnamed team members' (in addition to their named team members.). It essentially allows a team captain to add 'guest volunteers' to their connection - thereby reserving space for team members they have not yet identified.

[See this article for details on how this feature works on the public site:](#)

If you wish to use this feature - add the field "Allow Reservation of Anonymous Slots" to your page layout for Volunteer Events, Volunteer Opportunities and/or Occurrences. You'll also need to update the profiles of users to ensure they have read and write access to the field.

Here's a suggestion of where to add the field in your page layout:

Add the field to the Volunteer Event Page Layout

The screenshot shows the 'Volunteer Event Detail' page. At the top, there are 'Edit', 'Delete', and 'Clone' buttons. Below is the 'Information' section with a table of details:

Owner	9001 HOC Admin [Change]	Start Date	5/1/2019
Volunteer Event Name	Technology Event	End Date	7/10/2019
ARS Workflow to Display			
Allow Reservation of Anonymous Slots	<input checked="" type="checkbox"/>		

The 'Allow Reservation of Anonymous Slots' field and its checked checkbox are highlighted with a red rectangular box.

Add the field to the Volunteer Opportunity Page Layout

This field, along with several other fields in the Volunteer Opportunity object, when checked as true, means that ALL occurrences of the opportunity will allow team captains to reserve slots for unnamed team members. When checked at the Volunteer Opportunity level - there is no need to check it as true for all the opportunity's occurrences.

We suggest creating a new section on the Volunteer Opportunity Page Layout called "Advanced Options (Affectt all existing and new occurrences) and placing this (and as many of these other fields in this section).

▼ Search (Populate additional fields to improve search results)

Program Area (Local)

Impact Area (Local)

Primary Impact Area

Secondary Impact Area

Genders Served

Age Groups Served

Populations Served

Volunteer Activity Type

Suitable for Groups

RSVP/Seniors

Court Ordered Allowed

▼ Advanced Options (Affects all existing and new occurrences)

Include Pending for Max Attendance

Maximum Waitlist

Allow Reservation of Anonymous Slots

Turn off Waitlist

Turn off Teams

▼ Default values for newly created Occurrences

Default Location

Street

City

State/Province

Zip/Postal Code

Country

Google Map URL

St Address 123456

St Address 123456

City

CO

78899

United States

<http://maps.google.com/?q=St%20Address%20123456%20City%20CO%2078899>

Opportunity Coordinator

Opportunity Coordinator Email

Minimum Attendance

Opportunity Coordinator Phone

Maximum Attendance

Juan 正恩 Jaimes

juan.j@avviato.com

1

87654

101

Add the field to your occurrence page layout

▼ Registration Information (leave blank to auto-populate default values)

Minimum Attendance

Maximum Attendance

1

101

Registration cutoff (hours)

Registration Start Date

▼ Advanced Options

Turn off Teams

Maximum Waitlist

Allow Reservation of Anonymous Slots

Include Pending for Max Attendance

Turn off Waitlist

▼ View on Public Site

Occurrence URL

Locations Details Page

<https://ps0-dev.handsonconnect.org/opportunity/...>

https://ps0-dev.handsonconnect.org/HOC_Special_Direction?id=a0C6C000000kTOI

Update Profile(s) to ensure the field is available

- Remember: When you add a new field to page layouts, make sure you check the profiles of all your Salesforce Users who will be accessing these three page layouts - and make sure each profile has read and write access to the field "Allow Reservation

of Anonymous Slots" in all three objects (Volunteer Event, Volunteer Opportunity, and Occurrence) for each profile. If the profiles aren't updated - then the field won't be visible on their page layouts!

Go to Setup / Profiles and select each profile that will be using the new field. Navigate to the object in the profile, edit, and check the boxes for read and write access to the field.

How to install the Occurrence Name/Description Feature

A new feature is being beta-tested in HandsOn Connect that allows you to give each occurrence of a volunteer opportunity its own name and description.

This can be helpful if you have a date and time specific volunteer opportunity that will be subdivided into a variety of 'roles' or 'shifts'.

For example: You have a Volunteer Opportunity called "Picnic in the Park" and want to list three occurrences (shifts) the same day (but at different times), for Check-in Station, Lunch Distribution, and Valet Parking.

This article describes how to configure HandsOn Connect to enable this new feature.

The [next article in this chapter](#), describes how to use the feature to add Occurrence Names and Descriptions to a volunteer opportunity.

Open a help center ticket and Request to be added to the beta

This new feature is only available by request until we have finished the beta testing period. Please open a ticket in zendesk and request "Please add us to the Occurrence Name and Description Beta." We'll let you know when the new fields you'll need for this feature have been added to your instance of Salesforce.

NOTE: By default, the two new fields that will be added to your instance will also be available to all partners in the sharing portal. If you prefer to ONLY have this feature available on the Salesforce back end — please request "Do not make this feature available to partners in the sharing portal".

Give profiles permission to read and edit two new fields in the occurrence record

Go to Setup / Profiles and give both the System Administrator and Staff Profiles permission to view and edit two new fields in the Occurrence object:

- Occurrence Description
- Occurrence Name

Occurrence Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Occurrence ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Occurrence Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Occurrence URL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Add these fields to the Occurrence page layout in use by your profiles

In this example, I've added a new 'section' to the page layout labeled "Optional Occurrence Name and Description". This makes it clearer for users that the use of an occurrence name and description is strictly optional. I've then added the two new fields to this section.

Required Information			
★ Volunteer Opportunity	<u>Sample Volunteer Opportunity</u>	★ Start Date & Time	4/16/2018 12:24 PM
★ Location	<u>Sample Location</u>	★ End Date & Time	4/16/2018 12:24 PM
Occurrence Schedule and Status			
🔒 Schedule Type	Sample Schedule Type	🔒 Posting Status	Sample Posting Status
		★ Status	Sample Status
		🔒 Recurrence	<u>Sample Recurrence</u>
Optional Occurrence Name and Description			
Occurrence Name	Sample Occurrence Name	Occurrence Description	Sample Occurrence Description
Coordinator information (leave blank to auto-populate default values)			
Opportunity Coordinator	<u>Sample Contact</u>	🔒 Opportunity Coordinator Email	sarah.sample@company.com

(Option). Add the occurrence name to the occurrence related list for Volunteer Opportunities

If you frequently will be adding names and descriptions to occurrences, you may want to add the field "Occurrence Name" to the related list for occurrences in the Volunteer Opportunity Object.

Edit the Volunteer Opportunity page layout, asnd add the field "Occurrence Name" to the Occurrences related list:

Related List Properties - Occurrences

Help ?

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields

Minimum Attendance

Number of Occurrences

Occurrence Description

Old Guest Volunteer Hours Served

Old Total Hours Served

Old Volunteer Hours Served

Opportunity Approval Manager Email

Opportunity Coordinator

Add

Remove

Selected Fields

Occurrence ID

Occurrence Name

Start Date & Time

End Date & Time

Posting Status

Occurrence URL

Up

Down

Sort By:

Start Date & Time

Ascending

Descending

Apply column information to other page layouts:

Select All

Buttons

OK

Cancel

Revert to Defaults

You are now ready to start adding occurrence names and descriptions to one or more occurrences of a volunteer opportunity. [See this article for details.](#)

Enabling Move/Copy Connections functionality

This article details the steps taken by System Admins to enable the Move/Copy Connections.

NOTE: The ability to move or copy Connections while making it easier to complete these steps have the potential to corrupt or duplicate your data. System Admins should only enable these features for trained users. It is not recommended that you enable this feature for Partner Staff. If desired you can use permission sets to enable it for designated staff and partner staff users.

To learn more about [permission sets](#), see [this Salesforce post](#)

Granting Permission to the Visualforce Pages

The visualforce page associated with the Move/Copy Connection are already enabled for System Admins. If you wish to enable them for Staff or other profiles, follow these steps.

Visualforce Pages

Visualforce Pages provide a robust and easy to use mechanism to create new and productivity.

View: [Edit](#) | [Create New View](#)

Action	Label ↑	Name
Security	Menu1	Menu1
Security	Menu2	Menu2
Security	Menu3	Menu3
Security	Menu4	Menu4
Security	Menu5	Menu5
Security	Menu6	Menu6
Security	Move Copy Connections	Move Copy Connections
Security	My Organization Page	My Organization Page

System Admins should go to Setup -> Develop -> Pages.

Locate the Move_Copy_Connections page.

Click on Security next to Move_Copy_Connections

Enable Profile Access for Visualforce Page Move_Copy_Connections

The screenshot shows a dialog box titled "Enable Profile Access for Visualforce Page" with the subtitle "Move_Copy_Connections". At the top right are "Save" and "Cancel" buttons. The dialog is divided into two main sections: "Available Profiles" on the left and "Enabled Profiles" on the right. The "Available Profiles" list includes: Force.com - One App User, Gold Partner User, Marketing User, Overage Authenticated Website User, Overage Customer Portal Manager Custom, Overage Customer Portal Manager Standard, Partner Staff, Partner Staff Old, Read Only, Solution Manager, Standard Platform User, Standard User, Volunteer, and Volunteer Leader. Between the two lists are "Add" and "Remove" buttons. The "Enabled Profiles" list on the right contains "System Administrator" and "Staff", with "Staff" highlighted. A red rounded rectangle highlights the "Enabled Profiles" section, and a yellow rectangle highlights the "Add" and "Remove" buttons.

Select the Available Profile desired and add them to the Enabled Profiles column.

Click Save.

Adding the Buttons to Occurrence Page Layout

Go to Setup -> Create -> Objects -> select Occurrence.

On the Occurrence Detail Page, scroll down to the page layouts related list and select the desired page layout and click Edit, for our example we will use Staff Occurrence Layout v3.

Staff Occurrence Layout v3

Mini Page Layout Mini Console View Help for this Page

Save 3 Save Preview As... Cancel Undo Redo Layout Properties

Fields Buttons 1 Custom Links Visualforce Pages Related Lists Actions

Quick Find Button Name

Add to Campaign Move/Copy Connect... Submit for Approval

Clone Print Check-In Sheet

Delete Run Answer Report

Edit Sharing

2

Click and drag the button to the Custom Buttons section of the page layout.

Occurrence Sample

Chatter Feed

Publisher Actions

The publisher actions are currently inherited from the global publisher layout. You can [override the global layout](#) to set a customized list of actions for this layout.

Occurrence Detail

Standard Buttons Edit Clone Sharing

Custom Buttons Print Check-In Sheet Run Answer Report

Custom Button: Move/Copy Connect...

Repeat for any additional page layouts as desired.

Note: If you are not going to enable the "copy/Move Connections" functionality for Staff, we recommend you clone the Staff Page Layout v3 and rename it Admin Page Layout v3 and add the custom button to that page layout and assign the layout to the System Admin profile. You can opt to still share the Staff Occurrence Layout v3 between Staff and System Admins, and if you do then Staff users will receive the insufficient privileges message if the feature has not been enabled for them.

Enabling Grouped Occurrences

This article details the steps taken by System Admins to enable the Grouped Occurrences.

NOTE: While the ability to group occurrences makes it easier for volunteers to sign up for a series, there are business practices to be considered. System Admins should only enable these features for trained users. It is not recommended that you enable this feature for Partner Staff. If desired you can use permission sets to enable it for designated staff and partner staff users. (Grouped occurrences cannot be enabled for basic portal partner staff).

To learn more about [permission sets](#), see [this Salesforce post](#)

Enabling Profile Access

Grouped Occurrences are already enabled for System Admins, if you are not enabling for any other profile, then continue to the "Adding the Related List to the Volunteer Opportunity Page Layout" section below. To enable for Staff profile follow these steps.

Go to Setup -> Profiles -> and click on Staff.

Profile
Staff

Find Settings... | Clone | Delete | Edit Properties

Profile Overview | Assigned Users

Description	
User License	Salesforce
Created By	Ruchie Singh, 3/25/2011 12:41 PM

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com
[Learn More](#)

Assigned Apps
Settings that specify which apps are visible

Assigned Connected Apps
Settings that specify which connected apps are visible

Object Settings
Permissions to access objects and field layouts, and tabs are visible

Object	Permissions
Files	--
Google AdWords Setup	--
Google Campaigns	Read, Create, Edit, View All
Grouped Occurrences	Read, View All
Groups Security	Read, View All
Help	--
Home	--

Scroll down and click on the Grouped Occurrences Object

Profile
Staff

Find Settings... Clone Delete Edit Properties

Profile Overview > Object Settings > Grouped Occurrences

Grouped Occurrences 3 Edit

Tab Settings
Default On

Grouped Occurrences 6 Save Cancel

Tab Settings
Default On

Record Types and Page Layout Assignments

Record Types	Page Layout Assignment
--Master--	Grouped Occurrence Layout

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/> 4
Delete	<input type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Read	Edit
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Grouped Occurrences	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Name/Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Register for All Occurrences?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Total Occurrences	<input checked="" type="checkbox"/> 5	<input checked="" type="checkbox"/>
Volunteer Opportunity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

It is recommended that you grant Create and Edit access to staff and other profiles. If you want to allow Staff users to edit grouped occurrences created by other users, then you'll need to either create a sharing rule (see below) or select the Delete and Modify All options for the profile.

Staff should also be granted at least Read access to the Total Occurrences field. The Total Occurrences is populated through a trigger so Edit access is not needed.

Once you have updated the object and field permissions, click Save.

Repeat for all profiles that you wish to enable the functionality for.

Sharing Settings to allow Staff profile to Modify All Grouped Occurrence Records (only needed if you do not enable Modify All in the profile step above)

Grouped Occurrence Sharing Rules New Recalculate

1

No sharing rules specified.

Go to Setup -> Security Controls -> Sharing Settings

Scroll down to Grouped Occurrence Sharing Rules and click New

Step 1: Rule Name

Label:

Rule Name: [i](#)

Step 2: Select your rule type

Rule Type: ☐ Based on record owner ☒ Based on criteria

Step 3: Select which records to be shared

Criteria	Field	Operator	Value	
	<input type="text" value="Grouped Occurrences"/>	<input type="text" value="starts with"/>	<input type="text" value="GO"/>	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=""/>	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=""/>	AND

[Add Filter Logic...](#)

Step 4: Select the users to share with

Share with: [i](#)

Step 5: Select the level of access for the users

Access Level:

Click Save and select OK for the pop-up message.


Granting Permission to the Visualforce Pages

The visualforce page associated with the Grouped Occurrences are already enabled for System Admins. If you wish to enable them for Staff or other profiles, follow these steps.

Visualforce Pages

Visualforce Pages provide a robust and easy to use mechanism to create new and edit existing pages.

View: [Edit](#) | [Create New View](#)

Action	Label ↑	Name
Security 	Group Occurrences Page	Group Occurrences Page

System Admins should go to Setup -> Develop -> Pages.

Locate the Group_Occurrences_Page page.

Click on Security next to Group_Occurrences_Page

Enable Profile Access for Visualforce Page Group_Occurrences_Page

Save Cancel

Available Profiles

- Marketing User
- National Employee Coordinator
- Overage Authenticated Website User
- Overage Customer Portal Manager Custom
- Partner Staff
- Read Only
- Regional Employee Coordinator
- Solution Manager
- Staff Plus
- Standard Platform User
- Standard User
- Volunteer
- Volunteer Leader

Add Remove

Enabled Profiles

- System Administrator
- Staff

Select the Available Profile desired and add them to the Enabled Profiles column.

Click Save.

Adding the Related List to Volunteer Opportunity Page Layout

Go to Setup -> Create -> Objects -> select Volunteer Opportunity.

On the Volunteer Opportunity Detail Page, scroll down to the page layouts related list and select the desired page layout and click Edit, for our example we will use Staff Occurrence Layout v3.

Save 3 Save Preview As... Cancel Undo Redo Layout Properties

Fields Buttons Custom Links Visualforce Pages **Related Lists** 1

Quick Find Related List Name

Activity History	Content Deliveries	Occurrences	Required Prerequi...	Volunteer Opportu...
Answers	External Sharing	Open Activities	Skill Ratings	Volunteer Opportu...
Approval History	Grouped Occurrences	Questions	Used as Prerequis...	Volunteer Opportu...
Connections	Notes & Attachments	Occurrences		

2

Click and drag the Related List to the page layout. We recommend placing it between Recurrences and Connections.

Skill Ratings

Skill Rating ID Skill ▲

Sample Skill Rating ID Sample Skill

Occurrences New

Occurrence ID	Start Date & Time	End Date & Time	Posting Status
Sample Occurrence ID	8/20/2013 7:21 PM	8/20/2013 7:21 PM	Sample Posting Status

Recurrences New

Recurrence ID	Recurrence Type	Start Date
Sample Recurrence ID	Sample Recurrence Type	8/20/2013

☒ Grouped Occurrences

Connections New

Connection: Connection Id	Connection: Contact	Occurrence: Occurrence ID	Connection: Volunteer Opportunity Name	Connection: Start Date & Time	Connection: Team Name	Connection
---------------------------	---------------------	---------------------------	--	-------------------------------	-----------------------	------------

After adding the related list to the page, click on the wrench to modify the columns displayed.

4

Grouped Occurrences

Grouped Occurrences Related List Properties

Sample Grouped Occurrences

Related List Properties - Grouped Occurrences

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields	Selected Fields
Created By	Grouped Occurrences
Created By Alias	Name/Description
Created Date	Register for All Occurrences?
Last Modified By	Total Occurrences
Last Modified By Alias	
Last Modified Date	
Owner Alias	

5

Sort By: --Default--

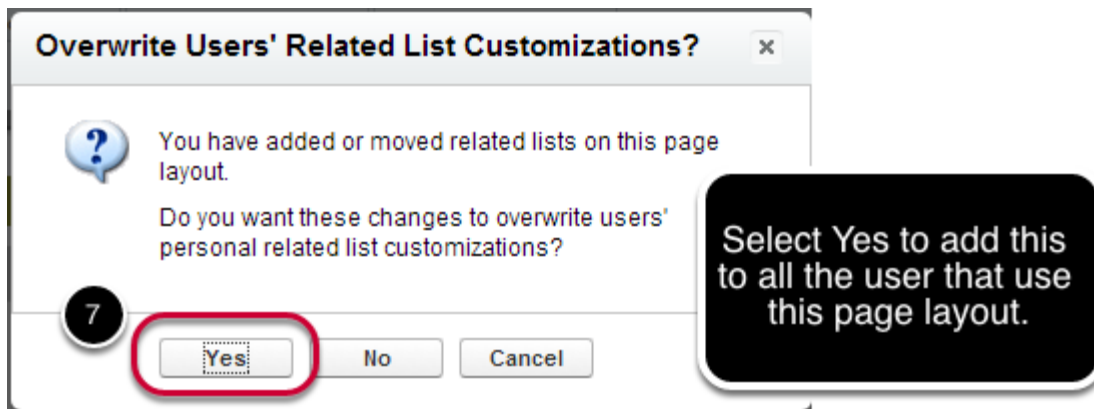
☒ Ascending

☐ Descending

Buttons

6 OK Cancel Revert to Defaults

Select the columns you wish to display and click OK.



Repeat for any additional page layouts as desired.

Note: If you are not going to enable the "Grouped Occurrence" functionality for Staff, we recommend you clone the Staff Page Layout v3 and rename it Admin Page Layout v3 and add the related list to that page layout and assign the layout to the System Admin profile. You can opt to still share the Staff Occurrence Layout v3 between Staff and System Admins, and if you do then Staff users will receive the insufficient privileges message if the feature has not been enabled for them.

Adding Grouped Occurrence field to the Occurrence record

Field Properties

Grouped Occurrences ☒ Read-Only ☐ Required ☐

OK Cancel

Once added to the page layout we strongly recommend that you double click the field to set it as Read Only so that edits can only be made in the Grouped Occurrence record.

Enabling the Notification Triggers

Home

Organizations

Contacts

Volunteer Events

Volunteer Opportunities

Control Panel

HandsOn Connect Control Panel

General

Site Configuration

Static Page Editor

Sponsor Manager

Skills Category Customization

Skills Customization

Basic Portal Configuration

Workflows & Email Alerts

Vol Registration Configuration

HandsOn Connect Managed Triggers

Save

Control Email Notifications for Individual Occurrences

Notification of Volunteer Sign up	<input checked="" type="checkbox"/>	Notification of Volunteer Removed	<input checked="" type="checkbox"/>
Notification of Volunteer Waitlist	<input checked="" type="checkbox"/>		

Control Email Notification for Grouped Occurrences

Notification of Volunteer Sign up (Grouped)	<input checked="" type="checkbox"/>	Notification of Volunteer Removed (Grouped)	<input checked="" type="checkbox"/>
Notification of Volunteer Waitlist (Grouped)	<input checked="" type="checkbox"/>	Volunteer Interest Notification (Grouped)	<input checked="" type="checkbox"/>
Opportunity Sign-up Confirmation - Affiliate	<input checked="" type="checkbox"/>	Opportunity Sign-up Confirmation - Affiliate Managed - e and Time Specific - Express Interests (Grouped)	<input checked="" type="checkbox"/>
Opportunity Sign-up Confirmation - Partner calendar email only (Grouped)	<input checked="" type="checkbox"/>	Opportunity Sign-up Confirmation - Partner calendar full sign-up (Grouped)	<input checked="" type="checkbox"/>

Click all 8 of the Grouped Occurrence Notifications so that Volunteers and Opportunity coordinators receive the notifications.

Enabling Prerequisites

This article details the steps taken by System Admins to enable Prerequisites.

NOTE: While the ability to add prerequisites makes it easier for volunteers to sign up for required trainings and orientations, there are business practices to be considered . System Admins should only enable these features for trained users. It is not recommended that you enable this feature for Partner Staff. If desired you can use permission sets to enable it for designated staff and partner staff users.

To learn more about [permission sets](#), see [this Salesforce post](#)

Enabling Profile Access

Prerequisites are already enabled for System Admins, if you are not enabling for any other profile, then continue to the "Adding the Button to the Volunteer Opportunity Page Layout" section below. To enable for Staff profile follow these steps.

Go to Setup -> Profiles -> and click on Staff.

! HOC 2.0 users only. If enabling for Partner Staff see the section for "Granting Access to the Customer Portal" before modifying the profile.

Profile
Staff

Find Settings... Clone Delete Edit Properties

Profile Overview Assigned Users

Description	
User License	Salesforce
Created By	Ruchie Singh, 3/25/2011 12:41 PM

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com
[Learn More](#)

Assigned Apps
Settings that specify which apps are visible to users

Assigned Connected Apps
Settings that specify which connected apps are visible to users

Object Settings
Permissions to access objects and fields, layouts, and tabs are visible

Portals --

Prerequisites 2 Read, View All

Price Books Read, Create, Edit

Products Read, Create, Edit

Scroll down and click on the Prerequisites Object

Profile
Staff

Find Settings... Clone Delete Edit Properties

Profile Overview > Object Settings Prerequisites

Prerequisites 3 Edit

Record Types and Page Layout Assignments

Record Types	Page Layout Assignment
--Master--	Prerequisite Layout

Prerequisites 5 Save Cancel

Record Types and Page Layout Assignments

Record Types	Page Layout Assignment
--Master--	Prerequisite Layout

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Read	Edit
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Prerequisites	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Prerequisite Volunteer Opportunity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Volunteer Opportunity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

It is recommended that you grant Create and Edit access to staff and other profiles. If you want to allow Staff users to edit prerequisites created by other users, then you'll need to either create a sharing rule (see below) or select the Delete and Modify All options for the profile.

All the field permissions are already granted and can't be edited.

Once you have updated the object permissions, click Save.

Repeat for all profiles that you wish to enable the functionality for.

Sharing Settings to allow Staff profile to Modify All Prerequisite Records (only needed if you do not enable Modify All in the profile step above)

Prerequisite Sharing Rules 1 New Recalculate

No sharing rules specified.

Go to Setup -> Security Controls -> Sharing Settings

Scroll down to Prerequisite Sharing Rules and click New

Step 1: Rule Name

Label: Staff Modify All Access

Rule Name: Staff_Modify_All_Access i

Step 2: Select your rule type

Rule Type: ☐ Based on record owner ☒ Based on criteria

Step 3: Select which records to be shared

Criteria	Field	Operator	Value
	Prerequisites	starts with	PRE
	--None--	--None--	
	--None--	--None--	
	--None--	--None--	
	--None--	--None--	

[Add Filter Logic...](#)

Step 4: Select the users to share with

Share with: Public Groups All Internal Users

Step 5: Select the level of access for the users

Access Level: Read/Write

Save Cancel

Set up the sharing as detailed here.

Click Save and select OK for the pop-up message.

Granting Access to the Customer Portal (Only needed if enabling for Partner Staff in HOC 2.0)

❗ Prerequisites are not available for partner staff in HOC 3.0. 3.0 users can ignore this step as the sharing portal is not controlled through Salesforce for 3.0 users.

The screenshot shows the Salesforce Custom Object Definition page for 'Prerequisite (Managed)'. The left sidebar contains navigation links for 'Administer' and 'Build'. The main content area shows the 'Custom Object Definition Detail' for 'Prerequisite'. A callout box with a black background and white text says: 'In edit view, scroll down to the Optional Features, and click the box for "Available for Customer Portal"'. The 'Optional Features' section has a checkbox for 'Available for Customer Portal' which is checked. The 'Deployment Status' section shows 'In Development' selected. The bottom of the page has 'Save', 'Save & New', and 'Cancel' buttons.

Granting Permission to the Visualforce Pages

The visualforce page associated with the Prerequisites are already enabled for System Admins. If you wish to enable them for Staff or other profiles, follow these steps.

Visualforce Pages

Visualforce Pages provide a robust and easy to use mechanism to create new and enhance existing applications to optimize your users' productivity.

View: All Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L

Developer Console				New
Action	Label ↑	Name	Namespace Prefix	
Security	Partners	Partners	HOC	
Security	PrerequisitePage	PrerequisitePage	HOC	
Security	PrerequisiteRelated	PrerequisiteRelated	HOC	
Security	Prereq	Prereq	HOC	

System Admins should go to Setup -> Develop -> Pages.

Locate the PrerequisitePage page.

Click on Security next to PrerequisitePage

Enable Profile Access for Visualforce Page Help

PrerequisitePage

Save Cancel

Available Profiles	Enabled Profiles
Marketing User	System Administrator
National Employee Coordinator	Staff
Overage Authenticated Website User	
Overage Customer Portal Manager Custom	
Partner Staff	
Read Only	
Regional Employee Coordinator	
Solution Manager	
Staff Plus	
Standard Platform User	
Standard User	
Volunteer	
Volunteer Leader	

Add Remove

Select the Available Profile desired and add them to the Enabled Profiles column.

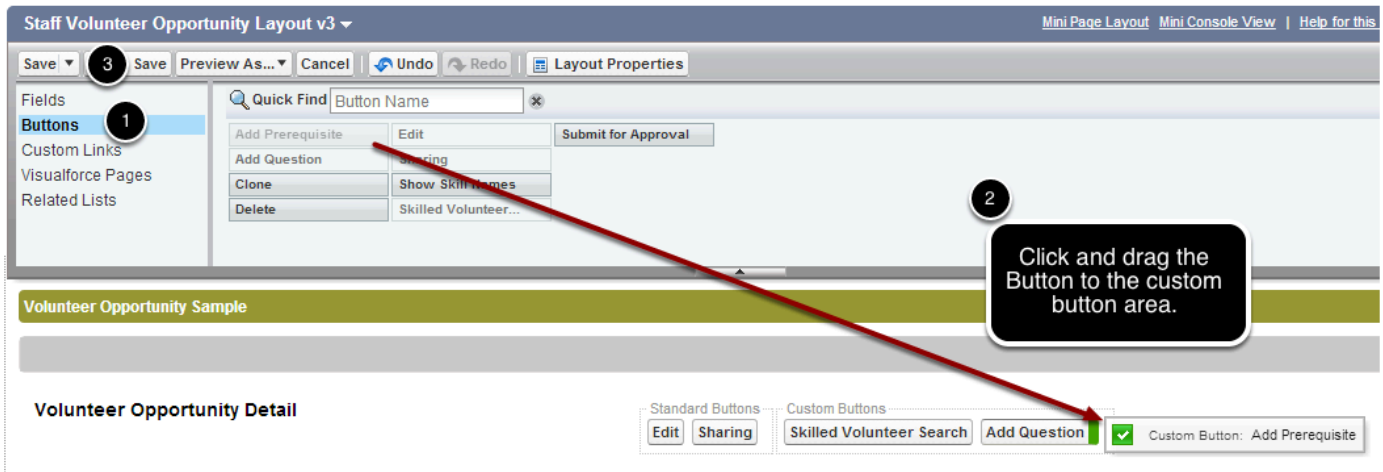
Click Save.

Repeat for the PrerequisiteRelated page.

Adding the Button to Volunteer Opportunity Page Layout

Go to Setup -> Create -> Objects -> select Volunteer Opportunity.

On the Volunteer Opportunity Detail Page, scroll down to the page layouts related list and select the desired page layout and click Edit, for our example we will use Staff Occurrence Layout v3.



Adding Prerequisite Related List to the Volunteer Opportunity Page Layout

There are two related lists available for the Prerequisites

Required Prerequisites - This will list the prerequisite associated with the volunteer opportunity record.

Used as Prerequisites - This will list the volunteer opportunities associated with the prerequisites.

You can add one or both of these to your page layouts.

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Related List Name

Fields: Activity History, Content Deliveries, Occurrences, Required Prerequisite, Volunteer Opportunity, Answers, External Sharing, Open Activities, Skill Ratings, Volunteer Opportunity, Approval History, Grouped Occurrences, Questions, Used as Prerequisite, Volunteer Opportunity, Connections, Notes & Attachments, Recurrence, Volunteer Opportunity

Required

Skill Ratings

Skill Rating ID

Sample Skill Rating ID

Required Prerequisite

Occurrences

Occurrence ID

Sample Occurrence ID

Related List Properties - Required Prerequisite

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields: Created By, Created By Alias, Created Date, Last Modified By, Last Modified By Alias, Last Modified Date, Owner Alias

Selected Fields: Prerequisites, Prerequisite Volunteer Opportunity

Sort By: --Default--

Ascending

Descending

For Required Prerequisites add the Prerequisite Volunteer Opportunity field.

For Used as Prerequisite add the Volunteer Opportunity field.

Adding "Used as Prerequisite" checkbox field to Volunteer Opportunity Page Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find pre

Fields: Section, Blank Space, Used as Prerequisite

Custom Links (Header not visible)

Information

Volunteer Opportunity Information

Owner: Sample User

Volunteer Opportunity Name: Sample Volunteer Opportunity Name

Managed By: Sample Managed By

Managing Organization: Sample Account

Organization Served: Sample Account

Schedule Type: Sample Schedule Type

Registration Type: Sample Registration Type

Type: Sample Type

Activity Type: Sample Activity Type

Training Type: Sample Training Type

Disaster Opportunity Type: Sample Disaster Opportunity Type

Used as Prerequisite

Field Properties

Used as Prerequisite

Read-Only

Required

Once Added, double click to make Read-Only

Used as Prerequisite is already available for Staff and System Admin profile. If you wish to add the field for Partner Staff, you will need to grant them Read access to the field.

NOTE: Because System Administrators are able to override 'read only' instructions on page layouts - please go into the System Administrator Profile and change the field level permission for the volunteer opportunity object's field "Used as Prerequisite" to VIEW (but not edit). This will prevent a system administrator from manually editing this auto-populated field.

Adding PrerequisiteRelated to the Contact page layout

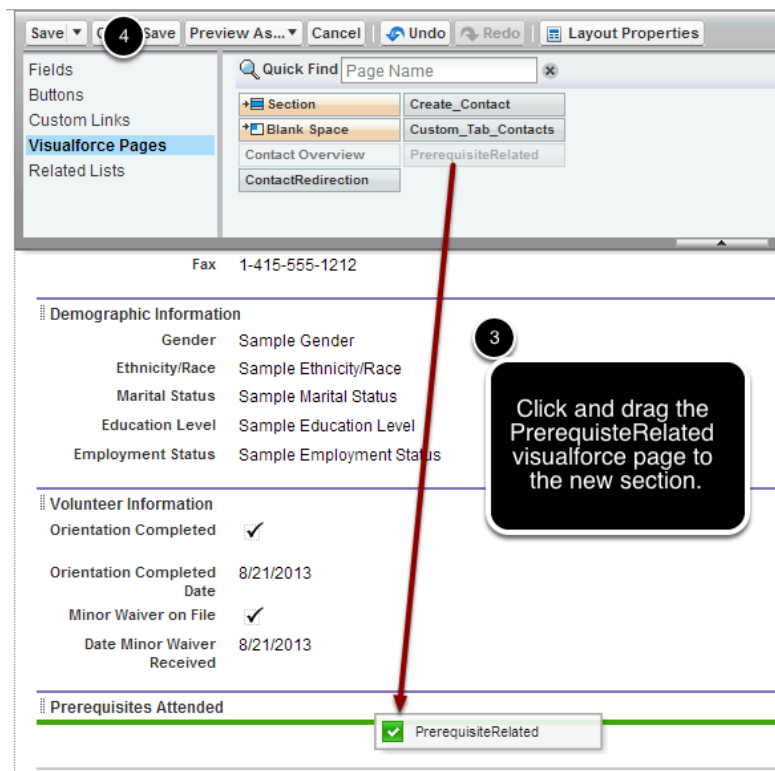
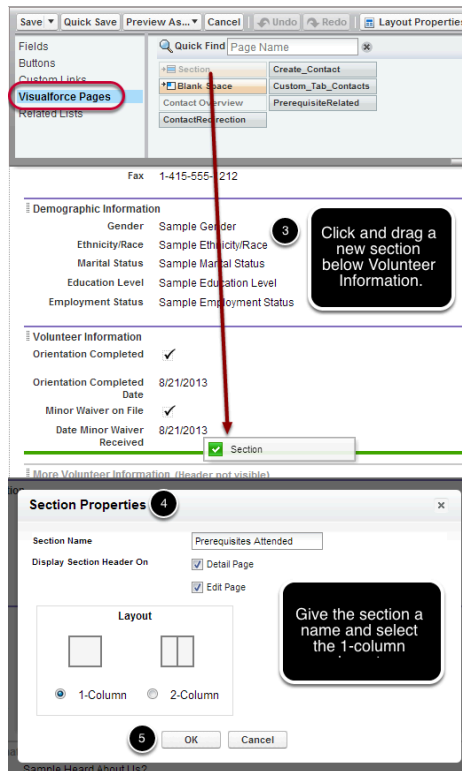
Contact Page Layout

This page allows you to create different page layouts to display different information on the Contact record page. After creating page layouts, click the Page Layout Assign button to assign a page layout to a contact.

Action	Page Layout Name
Edit Del	Admin Contact Layout(Volunteer)
Edit Del	Contact Layout
Edit Del	Partner Staff Contact Layout(Volunteer)
Edit Del	Staff Contact Layout(Volunteer)
Edit Del	VL Contact Layout(Volunteer)

Go to Setup -> Customize -> Contacts -> Page Layouts -> select Admin Contact Layout (Volunteer)

Recommended placement for the PrerequisiteRelated visualforce component is described below.



Repeat for Staff Contact Layout (Volunteer) and any additional page layouts as desired.

Note: Even if you don't grant the ability for Staff to create prerequisites, you can still grant them access to the PrerequisiteRelated page and add it to the page layout.

Enabling advanced controls over the sending of automated emails

In the Spring '16 release of HandsOn Connect, new fields were made available that allow for finer control of the automated emails sent to volunteers and Opportunity Coordinators.

Turning off the workflows that send volunteers confirmation, reminder and feedback email can be done globally, but that means no emails of that type will be sent. In the control panel it's possible to [turn off email notifications to Opportunity Coordinators](#). However -- this meant turning off these emails system-wide.

System administrators can choose to make it possible for internal staff and/or premium portal users to suppress the sending of these emails for a specific occurrence.

By adding new fields in HandsOn Connect to the occurrence page layout, it becomes possible to suppress any or all of the following

Emails sent to Volunteers:

- Confirmation Email sent when signing up or expressing interest in an opportunity
- Reminder Email
- Post Opportunity (thank you and feedback) email.

Emails sent to Opportunity Coordinators

- Notification of volunteer sign ups
- Notification of volunteer removals
- Notification of volunteer added to waitlist.

[Click here to read how to use this new functionality once you have enabled it.](#)

Why you might want to enable this functionality? Who is it for?

Generally we recommend that these emails are sent automatically by the system. They serve a purpose and insure clear communications to volunteers and Opportunity Coordinators. But in some circumstances,

- you may have a partner who has requested that they NOT get a notification every time a volunteer signs up for their occurrences.
- You might have a volunteer leader who doesn't want an automated Post Opportunity email sent, because they want to send a personal thank you email instead.

- You might have an ongoing opportunity occurrence where you don't want a confirmation email sent out every time someone signs up.
- If you want to send a custom email in place of the normal system email template - you can suppress the normal email for this occurrence, and then create a custom workflow that sends a different email template when connections are made for this specific occurrence. This gives you the ability to tailor your email communications on an occurrence by occurrence basis without having to change the default workflow or trigger for all other occurrences / connections.

If you don't need this level of control over email communications, then there is no need to enable this functionality. However, its been added to make this possible for advanced system administrators who wish finer control over emails sent by the system.

Who should have access to this functionality?

Our recommendation is that you limit access to this functionality to system admins and internal staff. Your staff is trained and understands the ramifications of suppressing normal system emails, and can administratively suppress emails on behalf of your partners and volunteer leaders upon request.

You can choose to give access to these fields in the occurrence page layout for partner staff (and volunteer leaders), but if you choose to do so, you are giving them the power to potentially confuse their volunteers (who may not receive useful emails), or to opt to remain ignorant as to whether or not volunteers are signing up for their occurrences.

The choice is yours. However, our recommendation is for you to enable this for internal use only initially, and later, if desired, roll it out to partners by using permission sets to control which partners and VLs can access these fields.

You enable this functionality by adding a new section and fields to the occurrence page layout

Go to setup / Objects / Occurrences / Page Layouts and click on 'edit' for Staff Occurrence Layout v3. (For the purposes of this tutorial, we'll assume your system admin and staff are both using the latest occurrence page layout, which is Staff Occurrence Layout v3.)

If you've not edited a page layout before, see this chapter on [modifying page layouts](#).

If you've added other "[Advanced Options](#)" to the occurrence page layout, the best place to add your new section is just below the 'Advanced Options' section. However you can place this new section anywhere on the page you like.

- Create a new, 2-column section called "Email Management for this Occurrence"
- Add the six fields shown in the screenshot below to this section. (You can also choose to only add some of these six fields)

Save the Page Layout

Advanced Options		
Include Pending for Max Attendance	<input checked="" type="checkbox"/>	Turn off Waitlist <input checked="" type="checkbox"/>
Maximum Waitlist	84,668	Turn off Teams <input checked="" type="checkbox"/>
Email Management for this Occurrence		
Do NOT Send confirmation Email	<input checked="" type="checkbox"/>	Do NOT Send email of Vol. in Waitlist <input checked="" type="checkbox"/>
Do NOT Send reminder Email	<input checked="" type="checkbox"/>	Do NOT Send email of Volunteer Signups <input checked="" type="checkbox"/>
Do NOT Send post Opportunity Email	<input checked="" type="checkbox"/>	Do NOT Send email of Volunteer Removals <input checked="" type="checkbox"/>
View on Public Site		
Occurrence URL	www.salesforce.com	Locations Details Page <input checked="" type="checkbox"/> Sample
Occurrence Summary Stats		
Total Occurrences	55,218	Volunteer Attended
		52,374

If you do decide to make this available in the partner or volunteer leader portal

Then also edit the occurrence page layout "Partner Staff Occurrence v3"

Check the partner and/or Volunteer Leader profile and make sure they have read/write access to these fields. OR -- for finer control of which portal users can use this feature, remove Read / Edit access to these six fields in the staff and/or VL profile, and then [create a permission set](#) granting read/write access to these fields.

See this article for more information on what each of these fields do.

Reference: Here are the email templates you'll be suppressing using these fields:

Do Not Send Confirmation Email:

- Opportunity Sign up Confirmation - Affiliate Managed (full sign up)
- Opportunity Sign-up Confirmation - Partner calendar full sign up
- Opportunity Sign up Confirmation - Affiliate Managed - Date and Time Specific - EI
- Opportunity Sign up Confirmation - Affiliate Managed - To Be Scheduled
- Opportunity Sign up Confirmation - Ongoing Opportunity — (partner managed)
- Opportunity Sign up Confirmation - Partner Calendar email only (express interest)

Do not send Reminder Email

- Opportunity Reminder - Affiliate Managed
- Opportunity Reminder - Partner Managed

Do not send Post Opportunity Email

- Post Opportunity - Affiliate Managed

- Post Opportunity - Partner Managed

Do not send email of Vol. in Waitlist

- Notification of Volunteer in Wait List

Do not send email of Volunteer Signups

- Notification of Volunteer Signups

Do not send email of Volunteer Removals

- Notification of Volunteer Removals

Enabling Batch Create for Team Members and Connections

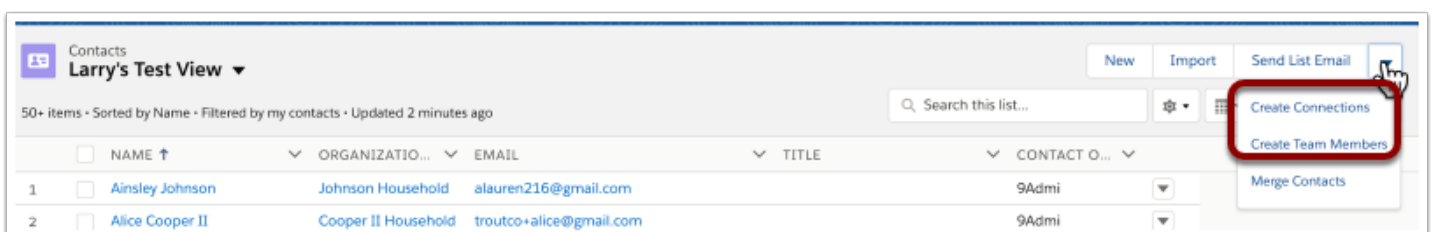
This article details the steps taken by System Admins to enable the Batch Create Functionality for Team Members and Connections.

NOTE: The ability to batch create Team Members and Connections while making it easier to complete these steps have the potential to corrupt or duplicate your data. System Admins should only enable these features for trained users. It is not recommended that you enable this feature for Partner Staff. If desired you can use permission sets to enable it for designated staff and partner staff users.

To learn more about [permission sets](#), see [this Salesforce post](#)

Note: If using HandsOn Connect Lightning - this functionality is already available and configured for access on the Utility Bar found at the bottom of the browser window and in Contact List Views by selecting the quick action via the triangle drop down on the upper right of all list views other than "Recently Viewed"

In classic - you'll need to configure and install as instructed below.



Granting Permission to the Visualforce Pages.

The visualforce pages associated with the Import Team Members and Import Connections are already enabled for System Admins. If you wish to enable them for Staff or other profiles, follow these steps.

Visualforce Pages

Visualforce Pages provide a robust and easy to use mechanism to create new and

View: [Edit](#) | [Create New View](#)

Action	Label ↑	Name
Edit Del Security	IdeasHome	IdeasHome
Security	ImportConnections1	ImportConnections1
Security	ImportConnections2	ImportConnections2
Security	ImportTeamMembers1	ImportTeamMembers1
Security	ImportTeamMembers2	ImportTeamMembers2
Edit Del Security	InMaintenance	InMaintenance
Security	InMaintenance	InMaintenance

System Admins should go to Setup -> Develop -> Pages.

Locate the ImportConnections1, ImportConnections2, ImportTeamMembers1, and ImportTeamMembers2 pages.

Click on Security next to ImportConnections1

Enable Profile Access for Visualforce Page

ImportConnections1

Save

Cancel

Available Profiles

Force.com - One App User

Gold Partner User

Marketing User

National Employee Coordinator

Overage Authenticated Website User

Overage Customer Portal Manager Custom

Read Only

Regional Employee Coordinator

Solution Manager

Staff Plus

Standard Platform User

Standard User

Volunteer

Volunteer Leader

Add

Remove

Enabled Profiles

System Administrator

Staff

Select the Available Profile desired and add them to the Enabled Profiles column.

Click Save.

Repeat the steps for ImportConnections2, ImportTeamMembers1, and ImportTeamMembers2.

Adding the Buttons to Contact views. (SF Classic Only)

Contact list views are universal for all users. If you enable either the Create Connections or Create Team Members buttons on the List View they will be displayed for **ALL** users that have access to the contacts tab. If you have not granted them permission to the related visualforce pages, they will simply get an insufficient privileges message.

While the Contacts tab is hidden by default for the Partner Staff portal, if you have enabled it for them they will have access to these buttons as well.

Please consider the visibility of these buttons prior to adding them to your Contact List View.

Contact Search Layouts

[Help for this Page](#)

Search layouts allow you to select the standard and custom fields that are displayed in the following search features:

- Search Results Columns for search and tagging. [View example](#)
- Lookup Dialogs that pop up when you click the magnifying glass on Lookup fields. [View example](#)
- Lookup Phone Dialogs that pop up when you click the magnifying glass on a SoftPhone dial pad. [View example](#)
- Recently viewed, modified, and created records lists displayed on tab home page. [View example](#)
- Search Results Filter Fields for search. [View example](#)

Search layouts also allow you to select the standard and custom buttons that are displayed in the following search features:

- Search Results for search and tagging.
- List Views for filtering records. [View example](#)

Contact Search Layouts				
Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Name, Account Name, Account Site, Phone, Email, Contact Owner Alias		Rexlo Joe 3/25/2011 12:41 PM
Edit	Lookup Dialogs	Name, Account Name, Account Site	N/A	Rexlo Joe 3/25/2011 12:41 PM
Edit	Lookup Phone Dialogs	Name, Account Name, Account Site, Phone, Mobile, Home Phone, Other Phone, Asst. Phone, Primary Phone	N/A	Rexlo Joe 3/25/2011 12:41 PM
Edit	Contacts Tab	Name, Account Name, Phone	N/A	Rexlo Joe 3/25/2011 12:41 PM
Edit	1 Contacts List View	N/A	New, Add to Campaign, Forward to Connections, Invite to Connect	Rexlo Joe 3/25/2011 12:41 PM

Go to Setup -> Customize -> Contacts -> Search Layouts

Click Edit next to Contacts List View

Edit Search Layout

Contacts List View

Customize the buttons on the Contacts list view:

- To remove any standard buttons, remove the check next to the name.
- To add custom buttons, select them and click Add.

Adding the Import menu to the Left Side Menu (Salesforce Classic Only)

Unlike the Contact List View buttons, the Import menu can be added to the Left Side Menu based on the Home Page layout assigned to the profile.

Home Page Layouts

This page allows you to create different tab layouts for the Home Page.

A B C D E F G H I J K L M N O P Q R		
Page Layout Assignment		
Action	Name	Created By
Edit Del	Admin Home Page Layout	Ruchie Singh, 3/2/12 12:41 PM
Edit Del	Employee Coordinator Home Page Layout	HOC 9002 Admin, 9/5/2012 6:27 PM
Edit Del	Home Page Default	Rexlo Joe, 3/25/2012 12:41 PM
Edit Del	Partner Portal Home Page Layout	HOC 9002 Admin, 8/8/2012 5:34 PM
Edit Del	Partner Staff Home Page Layout	Ruchie Singh, 3/2/12 12:41 PM
Edit Del	Staff Home Page Layout	Ruchie Singh, 3/2/12 12:41 PM
Edit Del	VL Home Page Layout	Ruchie Singh, 3/2/12 12:41 PM
Edit Del	Volunteer Home Page Layout	Ruchie Singh, 3/2/12 12:41 PM

Go to Setup - > Customize -> Home -> Home Page Layouts

Click Edit next to the desired Home Page Layout to add the Import menu option to. Default Page Layout Assignments are listed below. You can click on the "Page Layout Assignment" button to see the home page layouts assigned to the profiles for your instance.

- Admin Home Page Layout: System Admin
- Staff Home Page Layout: Staff
- Partner Staff Home Page Layout: Partner Staff
- Employee Coordinator Home Page Layout: Employee Coordinator

Layout Name
Admin Home Page Layout

Select Wide Components to Show

Items to Approve

Tasks

Partner Portal Lead Inbox

Partner Portal

Profile based Redirection

Calendar

Dashboard Snapshot

Employee Coordinator Home Tab

Partner Staff Home Tab

Select Narrow Components to Show

Portal Sidebar Search

Portal Document Search

Portal Solution Search

Portal Product Search

Tags

Partner Portal Welcome

HandsOn Connect Shortcuts

Dashboard

Left_sidebar_logo

Site Managed by:

Create New...

Recent Items

Messages & Alerts

Custom Links

Customer Portal Welcome

Site Owner

Confirm and Verify Volunteers

Import

Site Managed by: (Installed Package: HOC)

Volunteer Opportunity Related Skills List

2

3

Next

Cancel

Step 2. Order the components
Step 2 of 2

Arrange the components on your home page.

Narrow (Left) Column

Site Owner
 HandsOn Connect Shortcu
 Custom Links
Import 4
 Create New...
 Portal Sidebar Search
 Recent Items
 Tags

Top▲
Up▲
Down▼
Bottom▼

Wide (Right) Column

Dashboard Snapshot
 Tasks
 Calendar

Top▲
Up▲
Down▼
Bottom▼

Move the Import item to the desired placement in the Left Side Menu.

Previous
Save & Assign
Save
Preview
Cancel

Changing the labels and values of fields and Picklists using Salesforce Translation

Everyone does things just a little differently. That's why it's possible to customize language on HandsOn Connect's administrative side and in the premium partner portal to align with your organization's terminology.

Salesforce Translation Tool

[-] Schedule Type	
Date & Time Specific	
To Be Scheduled	On-going
[-] Secondary Impact Area	
[-] Skill Category	
[-] Skilled Volunteer Required	
[-] Status	
[-] Target Volunteer Groups	
[-] Training Type	
Organizational Development	
Other	
Volunteer Leadership	
Volunteer Management	
[-] Type	
Activity	Trainings & Other Opportunities
Project	Volunteer Opportunity
[-] Volunteer Activity Type	

What the Translation Tool can do:

The Salesforce.com Translation Tool allows you to change the language for staff, premium portal users, and back end users.

What language can be changed?

- Field labels
- Tabs
- Picklist values

Some examples include:

- Changing the Volunteer Opportunity Type options from "Project" and "Activity" to "Volunteer Project" and "Training" to make the terminology easier for your partners to understand.

- Changing the “Interests” field label to “Volunteer Interests” so that you can distinguish it from other interests you might want to track, like “Donor Interests.”

Limitations:

- Only back end language can be changed. The CMS remains the best tool to change language for your public site.
- The picklist value of "Training" for the "Activity Type" field can **NOT** be translated as it will break the Volunteer Opportunity Wizard. We are working on a solution for this.
- The Translation tool cannot change the underlying meaning for labels and picklist options. For example, in the Interests picklist, you can change “Animals” to “Animal Rights,” but not to “Community Gardening.”
- Values presented to the volunteers on the public site for search filters will not be changed. For example, in the Interests picklist, you can change “Animals” to “Animal Rights,” but on the public site it will still appear as “Animals” on the search page filter.
- The Translation Tool also doesn’t change the data that is sent to All for Good, so updating picklist values that are searchable will not affect advanced search filters on your site.

NOTE: Keep in mind that if you customize terminology in your instance of HandsOn Connect, then your instance will no longer match up to product training documentation and partner portal documentation. If you choose to make changes, plan on providing a 'translation glossary' to your staff and partners so they do not get confused.

[Documentation on how to enable the Salesforce.com Translation Tool can be found here.](#)

Documentation from Salesforce.com includes setup, adding languages, and entering translated terms!

Creating New Custom Objects in Salesforce

When to add a new object

Just because you can add as many fields as you want to an object - it doesn't mean you should. The power of a relational database comes in being able to see related objects in the page view - so you don't want to add too many extra fields with lookups in the record detail itself.

If you want to see a lot of different fields from different objects in one place, create a report!

But what do you do if, for example, you want to start keeping track of tools that are being used at different occurrences? Do you add fields to keep track of the tools?

NO. To fully leverage the power of a relational database you would create a new object: Tools.

You need a plan before you start.



Effective Databases aren't built by constructing things on the fly:

- You wouldn't build a house by grabbing a hammer and starting to put all walls
- You'd want a blueprint a plan. You need to consider the architecture.

- If you build a house by constructing one room, and then later add another room, and another ... the plumbing is never going to work!!!!

Don't start anything until you've thought through the big picture!

How's it going to work together?

What do you need in this new object and what objects will it be related to?

What if we were creating a "tools" object to keep track of the tools we check-out to occurrences of volunteer opportunities?



Start by thinking through all the kinds of fields you'll want to track.

Work with your organization to make sure you have a complete list of everything that will be needed BEFORE you start to create the new object and all its fields and its page layout!

Here's just a few things we might want in a TOOLS object:

- Name of the Tool
- Give each individual tool its own unique number?
- Location of the tool (a lookup to a location record)
- Who has the tool (a lookup to a contact record)
- Date tool was borrowed?
- Date tool is due back?
- Condition of the tool
- Cost of the tool?

- The occurrence the tool is being used by (a lookup to the occurrence record)
- The quantity of the tool

OR, do we want to give each tool its own record number with a unique number? If so we would need a TOOL ID number - and we would be able to run a report on how many tools were shovels.

We need to make decisions on how we want to manage our tool bank as a business process -- and THEN figure out what fields are needed in the object!

Learn About Building Data Models in Salesforce

Trailhead has a great module that explains how to build new objects in Salesforce.

[Click here to read about Data Modeling](#)

Salesforce Configuration instructions

Updating your company profile

When we set up your instance of HandsOn Connect, we set your company profile for you.

If you ever need to update your basic company information, here's how to do it.

Go to Setup and search for Company Information

Organization Detail

Organization Name: HandsOn Connect Demo Edit

Primary Contact: Larry Decker

Address: 6321 Rhodes Lane, Riverside, CA 92506, US

Phone: (209) 878-7688

Fax:

Default Locale: English (United States)

Default Language: English

Default Time Zone: (GMT-05:00) Eastern Standard Time (America/New_York)

Currency Locale: English (United States)

Used Data Space: 410.6 MB (40%) View

Used File Space: 3.5 MB (0%) View

Restricted Logins, Last 24 Hours: 0 (25,000 max)

Restricted Logins, Current Month: 0 (0 max)

Salesforce.com Organization ID: 00DA00000000aAsx

Created By: Staff Training Profile, 7/8/2010 6:33 PM Edit

Modified By: Larry Decker, 12/10/2010 6:40 PM

User Licenses

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Monthly Logins Allotted	Monthly Logins Used	Expiration Date
Overage Customer Portal Manager Standard	Active	20,000	0	20,000	2,000	0	
Overage Authenticated Website	Active	20,000	2,024	17,976	2,000	15	
Overage Customer Portal Manager Custom	Active	500	471	29	50	9	
Salesforce	Active	10	8	2	Not Applicable	Not Applicable	
Guest User License	Active	25	1	24	Not Applicable	Not Applicable	
Chatter Free	Active	5,000	1	4,999	Not Applicable	Not Applicable	

Feature Licenses

Feature Type	Status	Total Licenses	Used Licenses	Remaining Licenses
Marketing User	Active	10	1	9
Offline User	Active	10	0	10
Salesforce CRM Content User	Active	10	0	10

1. Click on Edit to make changes
2. Update information about your organization
3. You can see information about your current data usage and file storage against the total you're allowed.
4. You can see information about the current number of licenses you have in use

Changing Your password security settings

We ship HandsOn Connect to you with convenient password policies to make it easy for your users to deal with passwords. But Salesforce supports VERY strict password settings if desired.

The screenshot displays the Salesforce 'Password Policies' configuration page. The left-hand navigation pane includes sections for 'Personal Setup', 'App Setup', and 'Administration Setup'. Under 'Administration Setup', the 'Security Controls' menu item is expanded, and 'Password Policies' is highlighted with a red arrow. The main content area, titled 'Password Policies', contains a list of settings for password restrictions and login lockout policies. These settings include: 'User passwords expire in' (Never expires), 'Enforce password history' (No passwords remembered), 'Minimum password length' (5 characters), 'Password complexity requirement' (No restriction), 'Password question requirement' (Cannot contain password), 'Maximum invalid login attempts' (No Limit), and 'Lockout effective period' (15 minutes). Below these settings is the 'Forgot Password / Locked Account Assistance' section, which includes fields for 'Message' and 'Help link', and preview text for 'Forgot Password Preview' and 'Locked Account Preview'. At the bottom of the page is the 'API Only User Settings' section, which includes an 'Alternative Home Page' field. 'Save' and 'Cancel' buttons are located at the bottom right of the configuration area.

The settings above are how we ship HandsOn Connect to you.

Please note, we recommend you do not change the following:

User passwords expire in: If you make passwords expire, people will have to regularly reset their passwords. This will be confusing and annoying to most users.

Enforce password history: If changed from 'no passwords remembered' users will be forced to select new passwords when they reset them. We urge you not to do this, as it means that people will constantly have to be remembering their 'latest password'.

However -- ultimately security is up to you.

Please note: If you alter the password policy - please open a ticket in zendesk and alert us to the change. Our tech support staff uses their own system login to assist in maintaining your site -- and if you set passwords to expire or change -- we'll need to communicate the revised password to the entire support team or there will be significantly slower response time in helping you with support tickets. Thanks.

Creating a Sandbox

This article provides steps for configuring HandsOn Connect to work in a Sandbox.

For information on how to create a Sandbox, [click here for Salesforce.com documentation](#).

Sandbox Configuration

Add at least one Zip Code record

1. Click the + Tab to view All Tabs.
2. Click on the ZipCodes tab.
3. Click New
4. Fill anything in the Zip Code field and then click Save. (You will need to use this value when creating Location records so use something that you'll remember)

Run the batchSelfReported

A. You will have to deactivate the Validation Rule on Volunteer Opportunities that prevents your from editing or deleting them.

1. Go To Setup -> Create -> Objects
2. Select Volunteer Opportunity
3. Scroll down to the Validation Rules section and click Edit next to Self_Reporting_Unique_Opportunity
4. Uncheck the Active checkbox and click Save

B. Run the script:

1. Click your user name at the top of the screen and select Developer Console
2. Go to Debug -> Open Execute Anonymous Window
3. Delete any code that is there
4. Copy and past the following line into the window: `id batchinstanceid = database.executeBatch(new HOC.batchSelfReported());`
5. Press the Execute button.

C. Then reactivate the validation rule after the script has finished.

Create the Individual and HOC Customer orgs

Depending on the type of Sandbox or [Sandbox Template](#) you are using you may need to follow the steps below. If you already have the Individual Organization and HOC Customer Organization in your sandbox, then skip to the next section.

1. Go to the Organizations tab
2. Click the New Button
3. Select Individual as the Record Type
4. Fill in the Organization Name as Individual
5. Click Save
6. Go Back to the Organizations Tab and click the New Button
7. Select Nonprofit as the Record Type
8. Fill in anything for the Organization Name
9. Select Type: HOC Customer
10. Select Status: Active Partner
11. Select Impact Area: Any
12. Click Save
13. There is a field hidden from the page layout called HON Affiliate ID. This field needs to be filled in on your HOC Customer record with your client ID number. Edit the page layout and make this field visible so you can edit it. (If you don't know the number, go to setup / Users and you'll see a user record called HOC Admin that will have a login in this format "xxxx HOC Admin". The four numbers appearing as the xxxx are your client number and the HON Affiliate ID.) Fill this into this field and click save.

Tricks and Tips


How do I get the calendar to open to a specific month or date?

The Opportunity Calendar at /calendar automatically opens to the current month. But what if you want to create a navigational link to a calendar that opens on a future month? Or in week view? Or in day view and to a specific day?

It can be done by appending some parameters to the calendar URL. Here's how:

Examples:

- The URL `/calendar?year=2017&month=12` will open the calendar to December, 2017
- The URL `/calendar?year=2019&month=03&day=29` will open the calendar to March 29, 2019

 If you only specify the year, the calendar will be open on the month of January for that year.

The month parameter must be 2 digits, (January is 01): If you only specify the month, the calendar will open in the date: current year-month-01

Day must be 2 digits (the 1st is 01): If you only specify the day, the calendar will open in day view for the current year - current month

You can use these URLs as hyperlinks, or create menu items that open to specific days or months.

What about week view or day view?

If you specify `week=true` in the url, calendar will display the week which belong the requested day.

i.e.:

To open week Apr 1 — 7 2018, the url is:

`/calendar?year=2018&month=04&day=01&week=true`

(This week can be displayed by other url like

`/calendar?year=2018&month=04&day=02&week=true` because that day belongs to that week, too.)

Other considerations:

- If it's not specified year, month and day, but week is true (/calendar?week=true) it will display the current week.
- If it's not specified month and day, but week is true (/calendar?year=2018&week=true) it will display the first week of the requested year.
- If it's not specified day, but week is true (/calendar?year=2018&month=03&week=true) it will display the first week of the requested month.

The parameter &Day=True will open the calendar in day view.

How can I present a filtered view of the calendar for a future date?

Filter the calendar as desired, search, and then click on the "Get Shareable Link" button. Then copy the Search Result Link that you get.

Now, append to this saved search URL, the parameters to get to a specific date. However, since the first parameter is the saved ID, start the date parameters with a "&" instead of a "?"

Example: I want this filtered search to open in December 2018, so I use this shareable URL I get from the filters above:

<https://www.handsonrva.org/calendar/share/08bec8927aa148e3b491fca8af2444dc>

and then, if I want it to open in December, 2018 I append this to it:

&year=2018&month=12

The resulting URL would be:

<https://www.handsonrva.org/calendar/share/08bec8927aa148e3b491fca8af2444dc&year=2018&month=12>

If I wanted to open this filtered version of the calendar in week view during the week when Oct 31, 2019 is present, I would use this URL.


<https://www.handsonrva.org/calendar/share/08bec8927aa148e3b491fca8af2444dc&year=2019&month=10&day=31&week=true>

How to tell where an object was created in HOC (Tracking Fields for Public Site, Sharing Portal and Check-In Kiosk)

Objects that are created administratively in Salesforce always tell you who created it, and who (and when) it was last modified: These are standard SF fields called "Created by" and "Last Modified". They identify the Salesforce User who created and last modified the record. For example:



System Information

Created By	Last Modified By
 Max Ferguson, 2/27/2017 12:55 PM	 Max Ferguson, 2/27/2017 4:39 PM

Who is the user HOC Admin XXXX?

The 'user' responsible for creating many of the records in Salesforce is the API user that is part of your HOC installation. This user typically has a name like HOC Admin, XXXX. (where XXXX is your HandsOn Connect client number. The email address of the API user is typically clientXXXX@handsonconnect.org (where XXXX is your HandsOn Connect client number.)

Records created by the API user include Volunteer Opportunities, Occurrences and other objects created via the Volunteer Opportunity Wizard or various workflows and automations built into the administrative end of HOC.

Also: Any contact, connection, volunteer opportunity, occurrence, or any other object created through actions on the public site, or in the sharing portal, or via the check-in kiosk will appear to be created by the HOC Admin (API user).



System Information

Created By	Last Modified By
 0025 HOC Admin, 12/11/2018 10:18 AM	 0025 HOC Admin, 12/11/2018 10:18 AM

Is there anyway to know where the record was actually created then? Admin or Public Site?

Since all these records appear to be created by the same API user... is there any way to tell whether the record was created in SF, via the public site, or the sharing portal, or the check-in Kiosk?

Yes there is! Through hidden 'tracking fields' in most of these objects. If you have a need to know where a record was created, you can either add these tracking fields to the 'system admin' section of page layouts -- or, use list views or reports to find where the record was created and/or last modified.

This article will explain the HandsOn Connect tracking fields that can help you diagnose where a record was created and modified, and by whom:

Public site or Admin?

Creation Source - HOC_Source_c : This field has a value set to PUBLIC if created from public site or sharing portal, or kiosk. No value is set if the record was created administratively. (So if its null - you know it was done administratively in Salesforce.

Where on the public site was it created or modified?

Creation Source — HOC_CreationSource_c This field has a value which will tell you where the record was created.

Edition Source -- HOC_EditionSource_c This field has a value which will tell you where the record was last modified.

The possible values for these two fields are the following:

1. **'HOC-VolunterPortal-3.0':** When record is created or edited from the Volunteer Portal (Generally the action is performed by a volunteer or team captain)
2. **'HOC-SharingPortal-3.0':** When record is created or edited from the Sharing Portal (The action is performed for a Partner Staff or a Volunteer Leader)
3. **'HOC-VolunterPortal-OrgCreation-3.0':** This to identify the contacts created via the Organization Registration form.
4. **'HOC-VolunterPortal-MultipleConnections-3.0':** This is to identify the connections created as a part of a group of connections created at the same time.
5. **'HOC-Kiosk-3.0':** To identify contacts or connections created via the Check-In Kiosk.

Can we tell which contact actually created or modified the record via the public site or sharing portal?

Even if we know a record was created or modified via the sharing portal (for example), is it possible to know WHICH contact (partner staff) created or modified the record. Yes it is.

The fields that track this are:

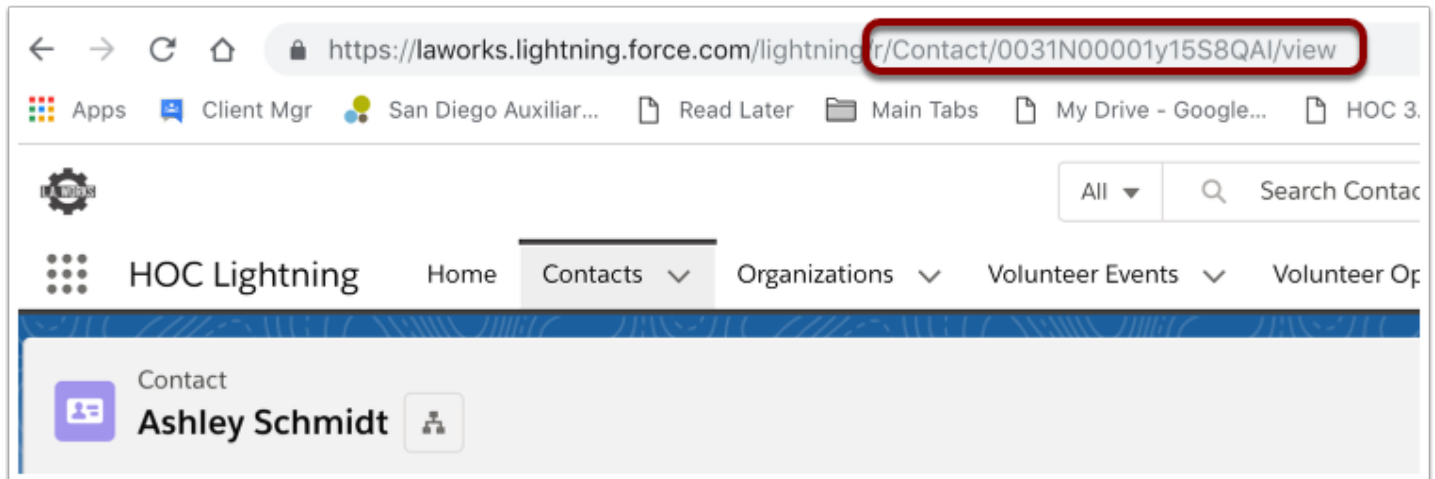
Site 3.0 Created By.
Site3.0 ModifiedBy

These fields store the **contact id** identifying who created or edited the record, If done via public site or sharing portal or check-in kiosk)

You can then look up the contact ID to find out WHO created or modified the record.

Just add the Salesforce ID found in this field (example: 0031N00001y15S8QA). to a SF URL to look up the record associated with that ID.

Example:



And now we know the record was created or modified by Ashley Schmidt.

(For Advanced Users): Is it possible to see the NAME of the contact who created or modified the record - instead of the ID?

Since HOC returns the contact ID for the person who created or modified the record in the sharing portal, you'd can always look up the contact via the ID in Salesforce. HOC does not return the 'name' of the contact associated with that ID.

However, if you wanted to see that name without having to look up the ID (because you often want to know WHO created or modified the record) you COULD create a custom field called Site 3_0 Creator Name, and one called Site 3-0 Modifier Name (both of type 'text', and a process builder that would populate the field with the name of the contact record matching the ID.

If you have experience with process builder, you can do this. Here's how to do it for identifying the name of the person creating or modifying the connection record in the sharing portal:

Create two custom text fields in the connection record called:

Site 3-0 Modifier Name

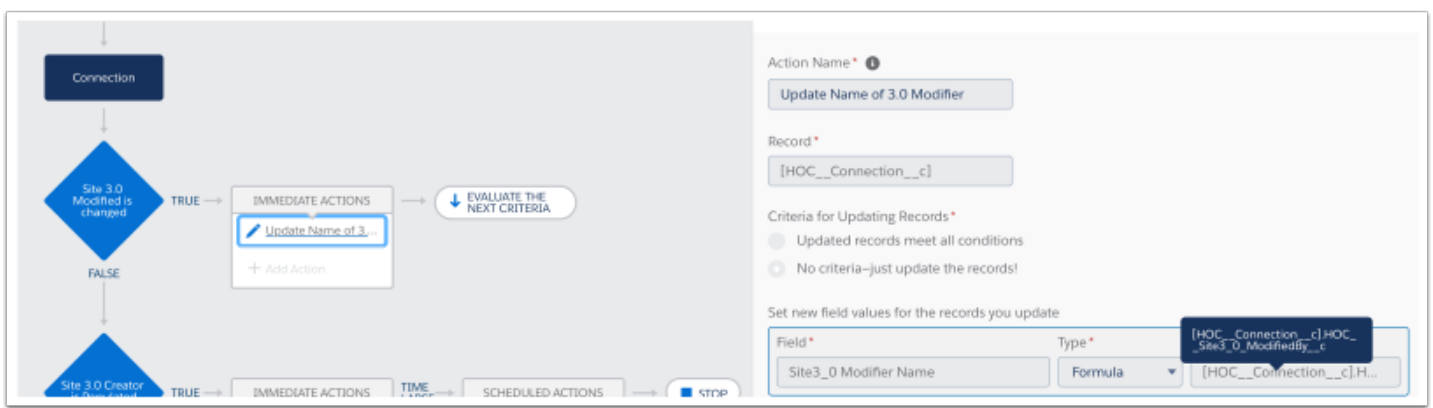
Site 3-0 Creator Name and build the following process.

(Screen shots of the process you would build using Process Builder

Object = Connection

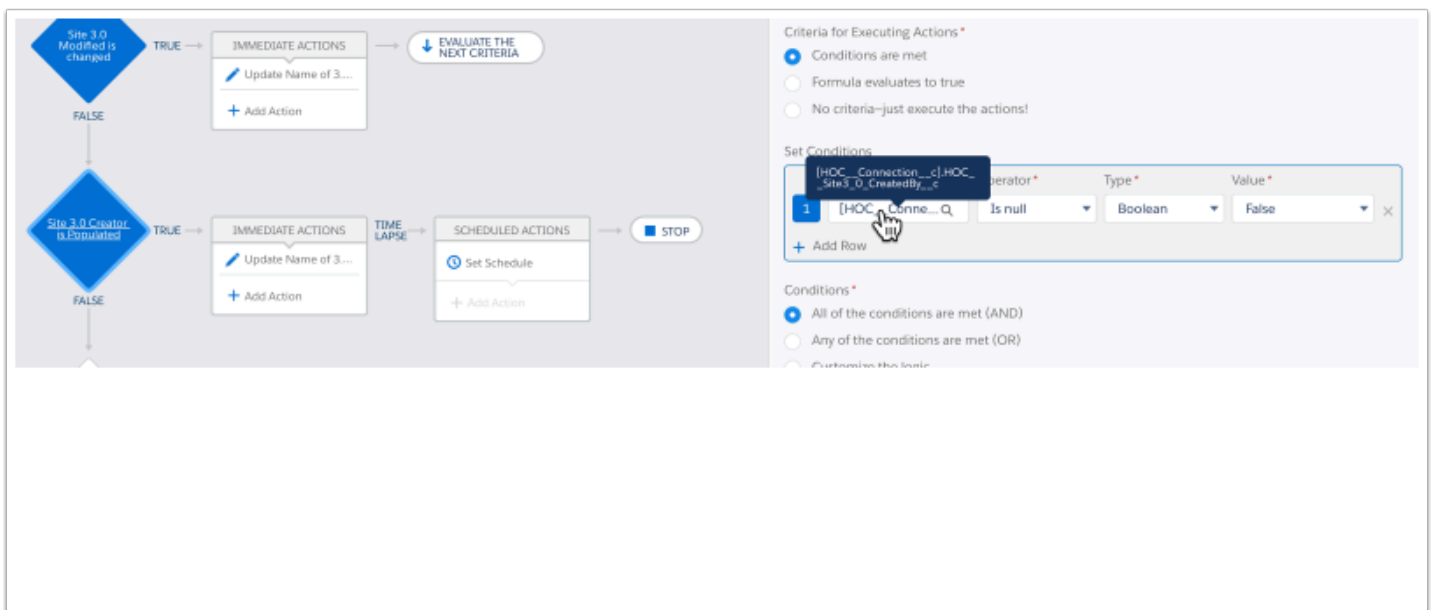
First Criteria: Site 3.0 Modified is Changed

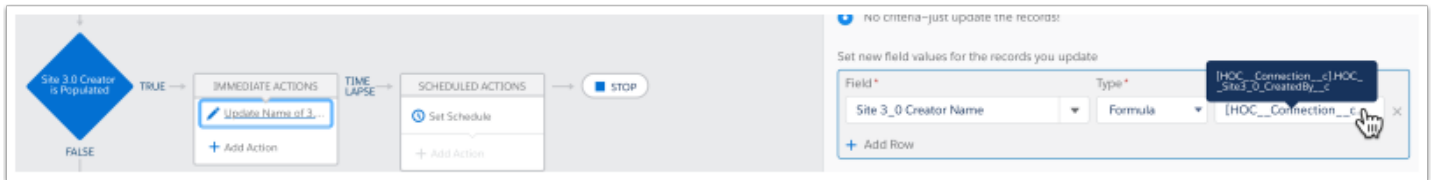
use the following criteria and one immediate action



Second Criteria: Site 3.0 Creator is Populated,

Use the following criteria and one immediate action





And add a stop after the 2nd criteria!

If you wish, you can create this same process builder for the fields Volunteer Opportunity, Occurrence and/or Contact so that you can always get the name of the sharing portal user who created or modified a record!

Examples and Tutorials

Using formula fields to add additional information related to lookup fields

Sometimes, you may have put a lookup field from another object into a page layout -- AND you might want some related information about the looked-up field, to also appear.

(Note: Reports are usually the best way to bring data from different objects together into an easy to see view however occasionally you may want a few items to be visible in the object record itself.)

Example: What if you want to add the mobile phone number for the Opportunity Coordinator to the Occurrence Record?

There is already a lookup for the Opportunity Coordinator name, as well as one for email.

As long as we have a lookup already in the object -- we can use formulas to bring in additional information about that 'looked-up' field.

Create a new field of type "Formula"

Step 1. Choose the field type

Step 1

Next Cancel

Specify the type of information that the custom field will contain.

Data Type

☐ None Selected Select one of the datatypes below.

☐ Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☒ **Formula** A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ Checkbox Allows users to select a True (checked) or False (unchecked) value.

Step:4 Give a suitable name in Field Label and select Text Formula Return Type , click on next Button

Follow the instructions in the general post about [creating a new field in an object.](#)

If you haven't already -- add the lookup field for the contact.

Then you will create another field -- of type Formula

Select Text as the data type

Step 2. Choose output type

Step 2 of 5

Previous

Next

Cancel

Field Label

Field Name

i

Formula Return Type

☐ None Selected

Select one of the data types below.

☐ Currency

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost__c`

☐ Date

Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

☐ Date/Time

Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

☐ Number

Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius__c + 32`

☐ Percent

Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount__c) / Amount`

☒ Text

Create a text string, for example, by concatenating other text fields.
Example: `Full Name = LastName & ", " & FirstName`

Previous

Next

Cancel

The mobile phone field in the contact record is of type 'phone' - but all we are concerned with is capturing the 'text' equivalent of the number in that field. So we select Text as the type.

Occurrence
New Custom Field

Step 3. Enter formula

Step 3 of 5

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Full Name = LastName & " " & FirstName [More Examples ...](#)

Simple Formula Advanced Formula

Insert Field Insert Operator

Opportunity Coordinator Mobile Phone (Text) =

Functions

All Function Category

ABS
AND
BEGINS
BLANKVALUE
BR
CASE

Insert Selected Function

Quick Tips

- [Getting Started](#)
- [Resources on CRM Community](#)
- [Operators & Functions](#)

Click on the **Advanced Formula** tab, and then **Insert Field** button

Insert Field

Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

Occurrence >	Opportunity Coordinator >	Mailing Zip/Postal Code
\$Api >	Opportunity Coordinator Email	Marital Status
\$Label >	Opportunity Coordinator Name	Max Distance for Invitations
\$Organization >	Owner ID	Middle Name
\$Profile >	Partner Staff Email	Minor Waiver on File
\$Setup.sf4twitter__Twitter_Configuration__c >	Posting Status	Mobile
\$Setup.sf4twitter__Twitter_Public_Configuration__c >	Record ID	Number of Contacts
\$System >	Recurrence	Old_Hours Served
\$User >	Recurrence >	Orientation Completed

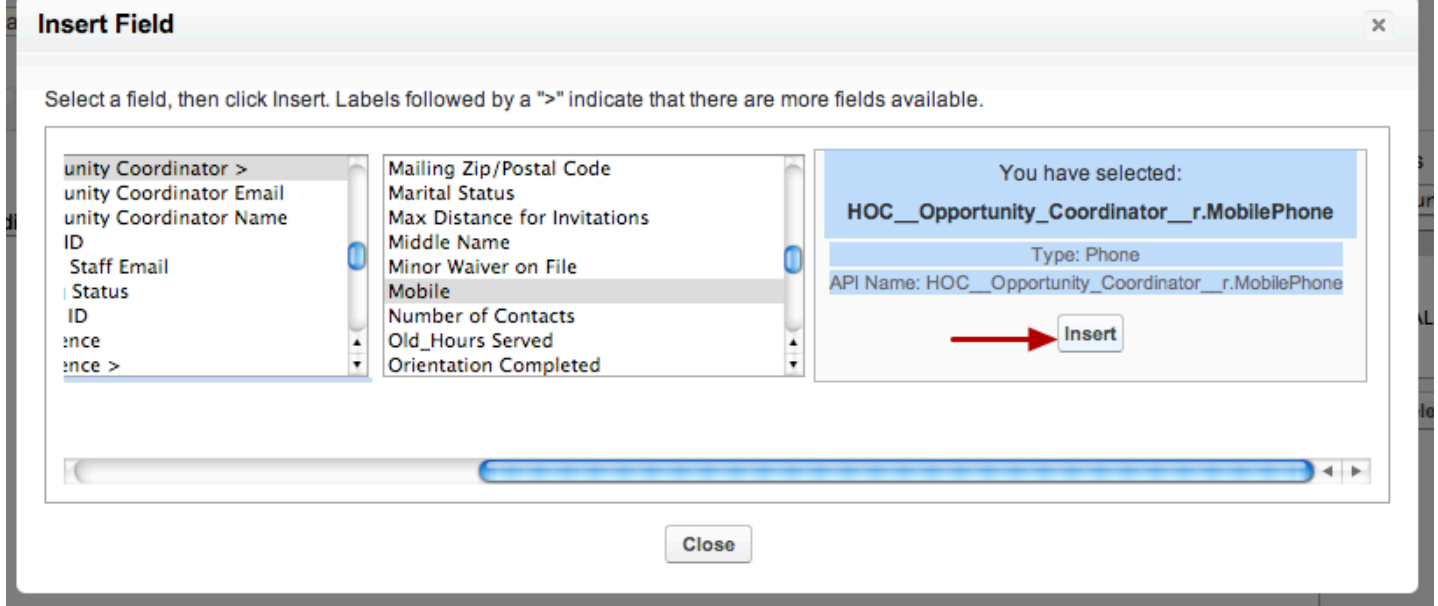
Close

We want the field to be related to the Occurrence object. Notice that all items in the hierarchal list that have more options have a > next to them.

We follow the hierarchy from Occurrence to Opportunity Coordinator (the lookup field already in the object), to all the fields related to the Opportunity Coordinator.

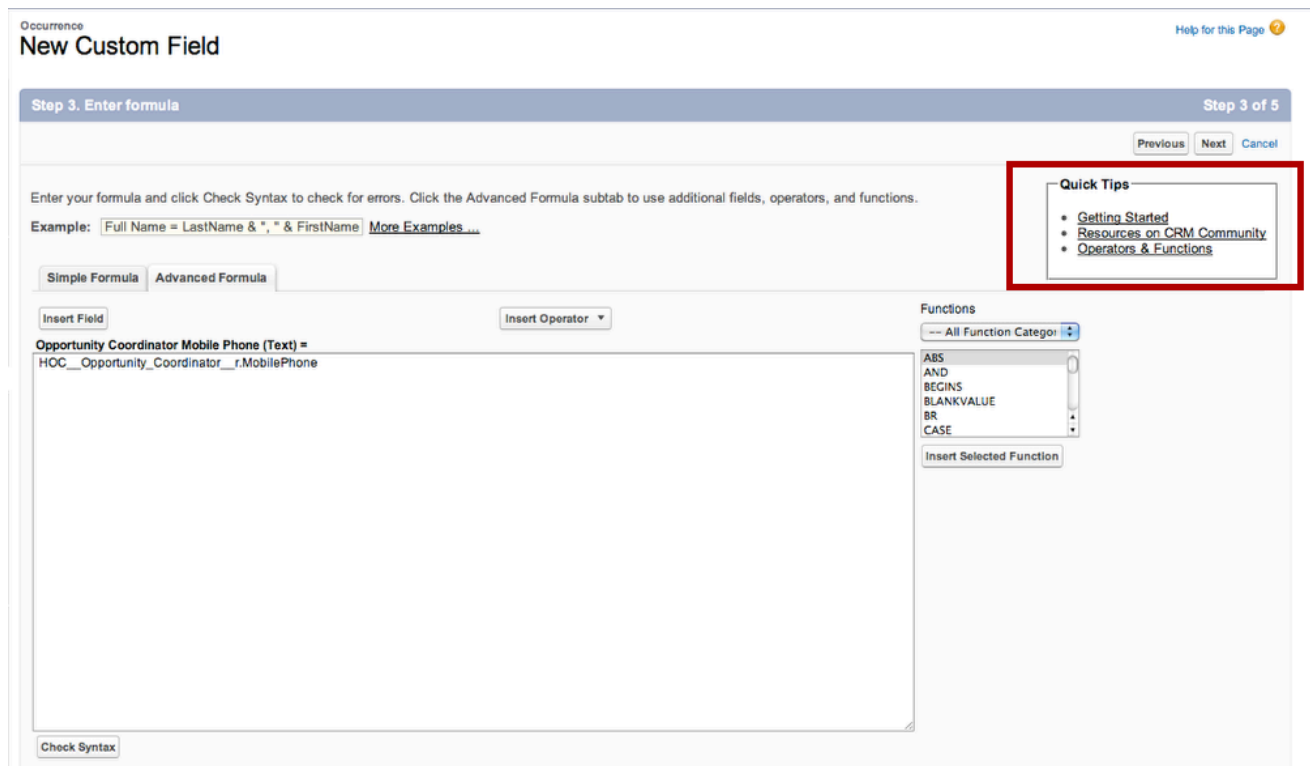
We select Mobile .

and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.



As we continue to scroll to the right, we see that we have the mobile phone for the correct contact.

Note: if there are more than one contacts on the Occurrence object -- we'd need to make sure we selected the right 'lookup' to get to the phone of the correct person.



This formula requires nothing else. But you can build complex formulas by concatenating different bits of information (i.e. First Name and Last Name).

For more info on using formulas -- click on the "Quick Tips" links in the upper right of this page.

Select the profiles you wish to make this object accessible to. (Note, since its a lookup formula, the field will be read only access)

Field Label: Opportunity Coordinator Mobile Phone
Data Type: Formula
Field Name: Opportunity_Coordinator_Mobile_Phone
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input type="checkbox"/> Visible	Read-Only
Content Only User	<input type="checkbox"/>	✓
Contract Manager	<input type="checkbox"/>	✓
Customer Portal Manager	<input type="checkbox"/>	✓
Customer Portal User	<input type="checkbox"/>	✓
Force.com - One App User	<input type="checkbox"/>	✓
Gold Partner User	<input type="checkbox"/>	✓
Marketing User	<input type="checkbox"/>	✓
Overage Authenticated Website User	<input type="checkbox"/>	✓
Overage Customer Portal Manager Custom	<input type="checkbox"/>	✓
Overage Customer Portal Manager Standard	<input type="checkbox"/>	✓
Partner Staff	<input checked="" type="checkbox"/>	✓
Partner Staff Old	<input type="checkbox"/>	✓
Read Only	<input type="checkbox"/>	✓
Solution Manager	<input type="checkbox"/>	✓
Staff	<input checked="" type="checkbox"/>	✓
Standard Platform User	<input type="checkbox"/>	✓
Standard User	<input type="checkbox"/>	✓
System Administrator	<input checked="" type="checkbox"/>	✓
Volunteer	<input type="checkbox"/>	✓
Volunteer Leader	<input checked="" type="checkbox"/>	✓
Volunteer Leader Old	<input type="checkbox"/>	✓
Volunteer Old	<input type="checkbox"/>	✓

Previous Next Cancel

In the final step you'll select which page layouts to add it to.

Step 5. Add to page layouts Step 5 of 5

Field Label: Opportunity Coordinator Mobile Phone
Data Type: Formula
Field Name: Opportunity_Coordinator_Mobile_Phone
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Occurence Layout
<input checked="" type="checkbox"/>	Partner Staff Occurence Layout
<input checked="" type="checkbox"/>	Staff Occurence Layout
<input checked="" type="checkbox"/>	VL Occurence Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Then, [m](#)odify the page layout to place the field exactly where you'd like it.

Our new page layout has the Mobile phone now appearing!

Occurrence
OC-025234

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Show Chatter](#) [Following](#)

[Add Tags](#)

[Back to List: Custom Object Definitions](#)

[Connections \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

Occurrence Detail

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Print Check-In Sheet](#)

HandsOn Connect Shortcuts

Occurrence Overview
 Here's your at-a-glance view of this Occurrence.
☒ Occurrence Published (Status: Active)
☐ Verifications Complete
 Total Verifications Due: 0
 Ready to create a new Occurrence? If so, [click here](#) to get started.

Information

Owner	Larry Deckel [Change]	Status	Active
Occurrence ID	OC-025234	Posting Status	We have approved your record and it was posted on 8/9/2011.
Volunteer Opportunity	Too late to Signup	Recurrence	
Location	Franklin Canyon Park	Volunteer Leader Needed	<input checked="" type="checkbox"/>
Occurrence URL	http://demo.handsonconnect.org/HOC_Volunteer O...		

Coordinator information

Opportunity Coordinator	Larry Deckel	Opportunity Coordinator Email	troutco+help@gmail.com
		Opportunity Coordinator Mobile Phone	(323) 123-1234

(Note: You won't see the formula fields populated UNTIL you have saved the record. At that time, the formulas are calculated and the fields will populate themselves.)

You can then add this new field to email templates used by alerts that are triggered by occurrence sign-up

Available Merge Fields

Select Field Type	Select Field	Copy Merge Field Value
Occurrence Fields	Opportunity Coordinator Mobile Phone	{!HOC__Occurrence__c.Opportunity_Coordinator_Mobile_Phone__c}

Copy and paste the merge field value into a section below.

{!HOC__Occurrence__c.HOC__Zip_Postal_Code__c}

Location Details:
{!HOC__Volunteer_Opportunity__c.HOC__HOC_Domain_Name__c}HOC__Special_Direction?id={!HOC__Occurrence__c.Id}

Project Description:
{!HOC__Occurrence__c.HOC__Occurrence_URL__c}

Please keep this email. It is the only place where you'll find the opportunity's address information. This Opportunity is being coordinated by:

{!HOC__Occurrence__c.HOC__Opportunity_Coordinator__c}:
{!HOC__Occurrence__c.HOC__Volunteer_Coordinator_Email__c}
{!HOC__Occurrence__c.Opportunity_Coordinator_Mobile_Phone__c}

If for some reason you cannot participate, please let us know as soon as possible so another volunteer can take your place. Follow the link below and use the Log In button in the upper right hand corner. Then, go to the "My Account" tab where you can remove yourself from the "Upcoming Opportunities" section:

{!HOC__Volunteer_Opportunity__c.HOC__HOC_Domain_Name__c}

We look forward to seeing you there!

Note: The three merge fields shown here for the Opportunity Coordinator are the correct ones to use.

Older users may have a different merge field for the NAME of the Opportunity Coordinator, and this should be updated to the merge field shown above.

These three fields will deliver the Name, Email Address, and Mobile Phone for the Opportunity Coordinator for this occurrence. (Assuming you named the custom Mobile Phone field as shown above).

How to get the Project Description Text Into a Report

We have had several HOC customers say that they wanted to be able to export a report, that includes the Volunteer Opportunity Name and also its description.

The problem is: In order to make project descriptions look attractive on the public site, project descriptions are created in the WYSIWYG editor and are made up of html.

As a result, you can only get html project descriptions in reports.

However -- if its important to you to be able to do this (because you need a 'hard copy' of your projects and their descriptions - there is a somewhat painless way you can do it through some easy manual manipulation.

When we create an opportunity description in the WYSIWYG editor, the description field actually is HTML.

▼ Description Information

Description

```
<p><strong>NOTE</strong>: This volunteer opportunity is for <span style="color: #000000;">women</span> only. The world is scary when you don't have a permanent place to call home. Ease the uncertainty of the youngsters at the Mother-Child Residence by engaging them in arts and crafts activities while their moms attend a social service class that evening. These kids (aged 5-12) adore the company of our warm and friendly volunteers. The arrival of Handson Demo volunteers fills the halls with happy shouts and hugs!</p>
<p>The Good Shepherd Mother-Child Residence provides programs that address the complex needs of homeless women with children in Southern California and Orange County.</p>
<p>16 and 17 year olds can attend this project without parent by arriving with a <a target="_blank" href="http://localhost:8080/servlet/servlet.FileDownload?file=015A0000000XSPG">parental waiver form</a>. Volunteers who are 14 or 15 must be accompanied by a parent.</p>
```

Here's how it looks in the field "Description".

And that is what that field will look like in a report. Not very readable :-(

What we need is a new field in which we can put a text only version of the project description. Unfortunately, Salesforce does not have a native feature to 'strip' html

Report View of Description Field

test lynn	
Urban Farmers	<p>Georgia's largest organic community garden has really take...
VIP Hospitality Hosts	<div style="text-align: center;"></div> Hosts are needed to serve as escorts in L...

In Report view -- the description is truncated, but we'll see it all if we export to excel

Exported Report in Excel

Volunteer Opportunity: Volunteer Opportunity Name	Description	End Date
	<p>A Hands On Greater Portland volunteer leader will lead this project. No advance training or ongoing commitment required. Need help signing up? Call 503-200-3355. Join the Johnson Creek Watershed Council for a work party at Clatsop Butte, an upland forest habitat that offers a natural oasis for people and wildlife in fast-growing Southeast Portland. We'll spend the morning doing important restoration work, including maintaining a newly planted area and cutting, trimming and removing invasive blackberry. Blackberry is cleared away to make room for plantings of native trees and shrubs to promote wildlife habitat and biological diversity. Bring gloves if you have them, a water bottle, and dress for the weather!</p> <p>This project is great for volunteers ages 13 and older. Volunteers under age 18 will need to bring a waiver signed by a Parent/Guardian; please click on the link below to download: Youth Volunteer Release Form</p>	
* Morning Restoration at Clatsop Butte		4/26/13
Abbott Volunteer Day		12/31/12
Apples, Kisses and Shoes	<p>&nbsp;We'll be reading stories and filling the hearts of the young ones at this care facility with joy.</p> <p><p>Come talk, sing and read bedtime stories with the toddlers of Polinsky! These babies and young children have been removed from their homes for their own safety and need lots of love and attention. This is a challenging but very rewarding project.</p> <p>Their mission: to ensure that children have as normal as environment during their transitional period. &nbsp;</p> <p>Project requirements: Join Flex. &nbsp;&nbsp;&nbsp;Minimum Age: 18. &nbsp;&nbsp;&nbsp;All volunteers must have valid Polinsky Center IDs. New volunteers are not being accepted at this time. </p></p>	1/22/15

We can see it all. But it's all html.

What's needed is a new field where we keep a text-only version of the project description.

There's no way to automate this process... but we can manually get what we need. Here's how:

Create a New Field

Volunteer Opportunity Custom Field

Description (Text)

[Back to Volunteer Opportunity](#)

Validation Rules [0]

Custom Field Definition Detail

EditSet Field-Level SecurityView Field Accessibility

Field Information

Field Label	Description (Text)	Object Name	Volunteer Opportunity
Field Name	Description_Text	Data Type	Long Text Area
API Name	Description_Text__c		
Description	Experimental Field - to test viability of a non-html version of the project description		
Help Text	Copy The Description info here in plain text. Do not paste in any html. (Strip it before putting in this field)		
Created By	Larry Deckel, 11/7/2012 9:39 PM	Modified By	Larry Deckel, 11/7/2012 9:39 PM

General Options

Default Value

Long Text Area Options

# Visible Lines	10	Length	32,768
-----------------	----	--------	--------

Create a new custom field for the **Volunteer Opportunity object** and place it on the page layout.

We'll create a new field called **Description (Text)**, of data type **Long Text Area**. I've put in a description and help text.

See these posts:

[Adding Custom Fields to an Object](#)

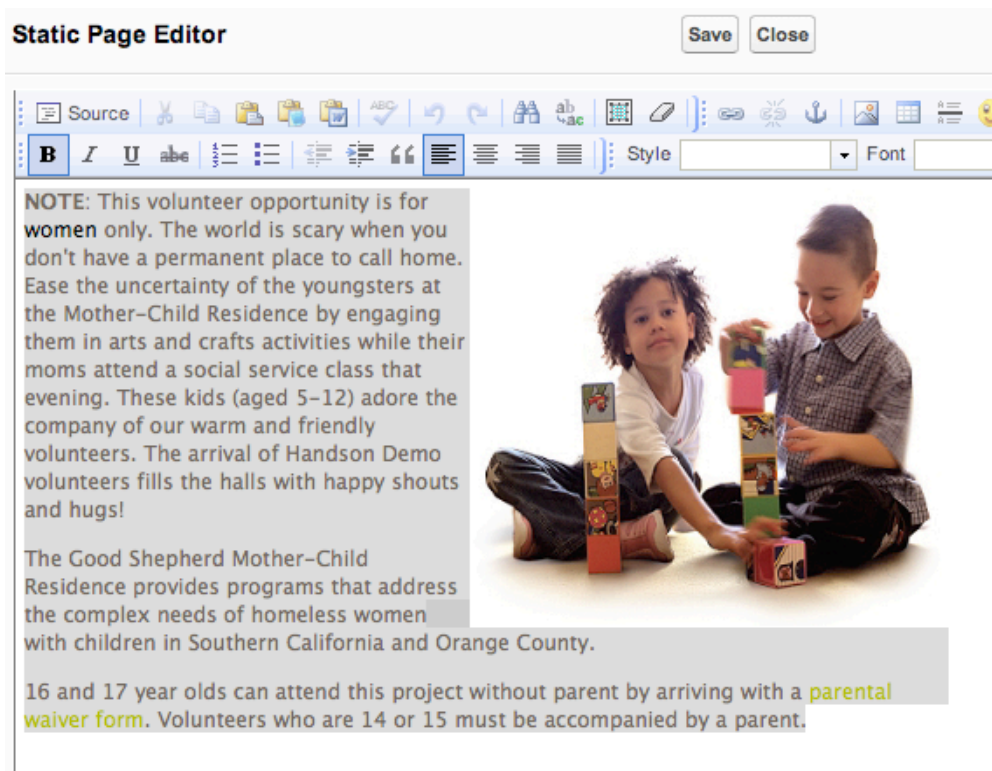
[Modifying Page Layouts](#)

You'll need to manually populate this field with just the text of your project description

A bit of extra work - but you now want to have both the WYSIWYG based html project description (the one you normally create when you create a volunteer opportunity), and your text-only version of the description as well.

You can manually type or paste it in of course..... but here's a trick that makes it pretty simple:

Open the WYSIWYG Editor after you have created the project description:

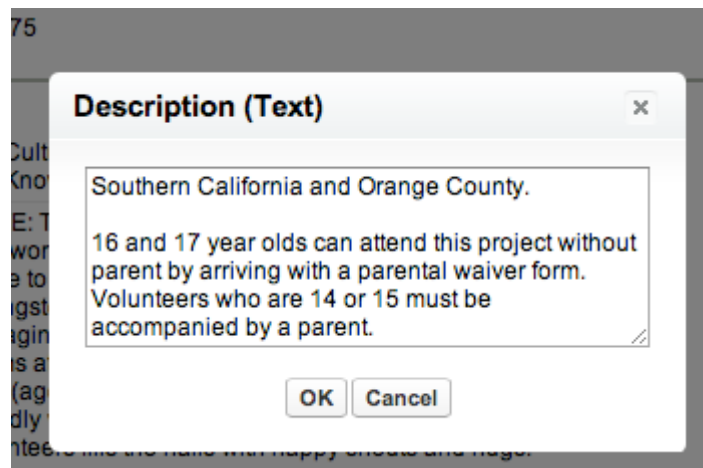


Now Select ALL the text you see and copy it to your clipboard. (In the WYSIWYG view -- not in the source code)

I have selected all the text, and now COPY it to my clipboard.

Then close the description field.

Double click on your new "Description (text)" field and PASTE the clipboard contents into the field



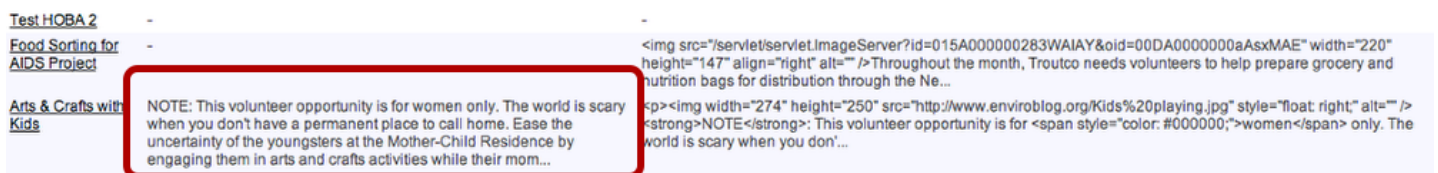
Because its a text only field it will just paste in the text. It won't pick up bold, font formats or hyperlinks. Just the plain text! It even preserves the line breaks.

Note: This works in our WYSIWYG editor because it is only a view of the underlying code.

Alternately - you can try pasting from whatever source you might have written the project description in before using the WYSIWYG editor. Try cutting and pasting from word... it should work... because the field will only support text characters.

But NOW you have a field in the Volunteer Opportunity Object that is text only, and contains the project description.

Now create a report that meets your need, and use the field "Description (text)" instead of the native "Description" field.



The field circled above is the text only description. Much better for your report. (Though still truncated in the view here - a salesforce limitation on the number of characters you can view in a report field).

Export to Excel to see the complete description (along with any other fields you want to make part of your report!)

Excel Report showing our new field (left) and the old field contents (right)

Arts & Crafts with Kids	<p>NOTE: This volunteer opportunity is for women only. The world is scary when you don't have a permanent place to call home. Ease the uncertainty of the youngsters at the Mother-Child Residence by engaging them in arts and crafts activities while their moms attend a social service class that evening. These kids (aged 5-12) adore the company of our warm and friendly volunteers. The arrival of Handson Demo volunteers fills the halls with happy shouts and hugs! The Good Shepherd Mother-Child Residence provides programs that address the complex needs of homeless women with children in Southern California and Orange County. 16 and 17 year olds can attend this project without parent by arriving with a parental waiver form. Volunteers who are 14 or 15 must be accompanied by a parent.</p>	<p>12/31/13</p>
-------------------------	--	-----------------

Creating a Report to monitor team signups as a percentage of total connections

Create a Report of type "HOC Vol Opps and Occurrences with/without connections"

Report Properties Add Report Type Run Report

Filters Add ▼

Show All volunteer opportunities ▼

Date Field Created Date ▼ Range All Time ▼ From [] To []

AND Team Member: Team Member ID not equal to ""

AND Connection Status equals "Confirmed"

AND Occurrences with Connections

AND Volunteer Opportunities with Connections

Use the following filters to restrict the report:

1. All Volunteer Opportunities, regardless of date
2. Team Member: Team member ID is not null (This will only show the connections where the person is a member of a team)
3. Connection Status equals "Confirmed" (This is optional - but we're only interested in upcoming connections where the volunteers have been confirmed to attend.)
4. Occurrences with Connections (This is a cross filter, to filter out occurrences that don't have connections).

Add these fields to the report

Connection ID	Team Name	Connection Start Date & Time	Occurrence End Date & Time	Connection ID	Number of Connections	Maximum Attendance	Role	Contact: Full Name
Volunteer Opportunity Name: Arts & Crafts with Kids (7 Records)						7		
Occurrence ID: OC-030265 (7 Records)						7		
Drop a field here to create a grouping. Hide								
CO-087381	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A00000hCYty	1	8	Volunteer	Cathy Cheese

You can add more or fewer fields depending on what info you want to see in the report.

1. Connection ID
2. Team Name
3. Connection Start Date & Time
4. Occurrence End Date & Time
5. Number of Connections (Summarize on this field to get the SUM of this number)
6. Maximum Attendance

7. Role (So we can find who the team captain(s) are easily)
8. Contact: Full Name
9. Volunteer Opportunity Name: (Summarize on this field)
10. Occurrence ID (Summarize on this field as a second summary after the Volunteer Opportunity Name)

Create a Formula Field called "Team Percentage" to calculate what percentage of the max volunteers are team members:

Custom Summary Formula

Column Name:

Description:

Format: Decimal Places:

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

☐ All summary levels

☐ Grand summary only

☒ Grouping 1: Volunteer Opportunity Name

☒ Grouping 2: Occurrence ID

Formula:

Functions:

ABS(number)

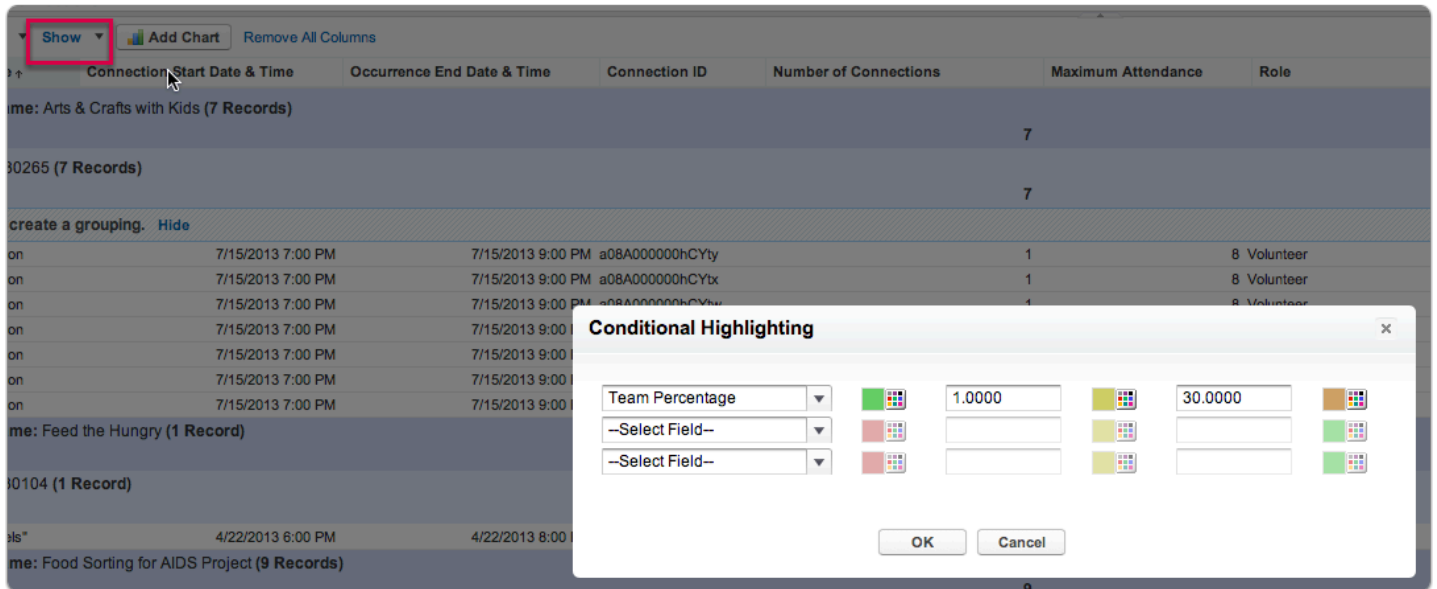
Returns the absolute value of a number, a number without its sign

The formula is: HOC_Connection__c.HOC_Number_of_Connections__c:SUM / HOC_Volunteer_Opportunity__c.HOC_Maximum_Attendance__c:AVG

We are just dividing the sum of the number of connections (which are the team connections) by the maximum attendance of the volunteer opportunity (We take the average since we want the one number, not its sum) And we express this as a percentage.

Add this to your layout.

Use Conditional Highlighting on the "Team Percentage" field, to create color alerts that show the occurrences with the greatest percentage of Team Connections



In the "Show" Menu, choose conditional highlighting, which will open a window for you to set the colors and break points of your conditional highlighting.

I've set 1% as the first breakpoint, and 30% as the second (and set the color to red).

What this will do is mark all occurrences with 1% or less team connections to green (I can ignore these), and yellow highlight those that have even a few team connections to yellow. If over 30% of the connections for a given occurrence are team connections it will be highlighted as red.

It's the upcoming occurrences with red highlighting, where I'll want to contact the team captain and make sure their team members are coming!

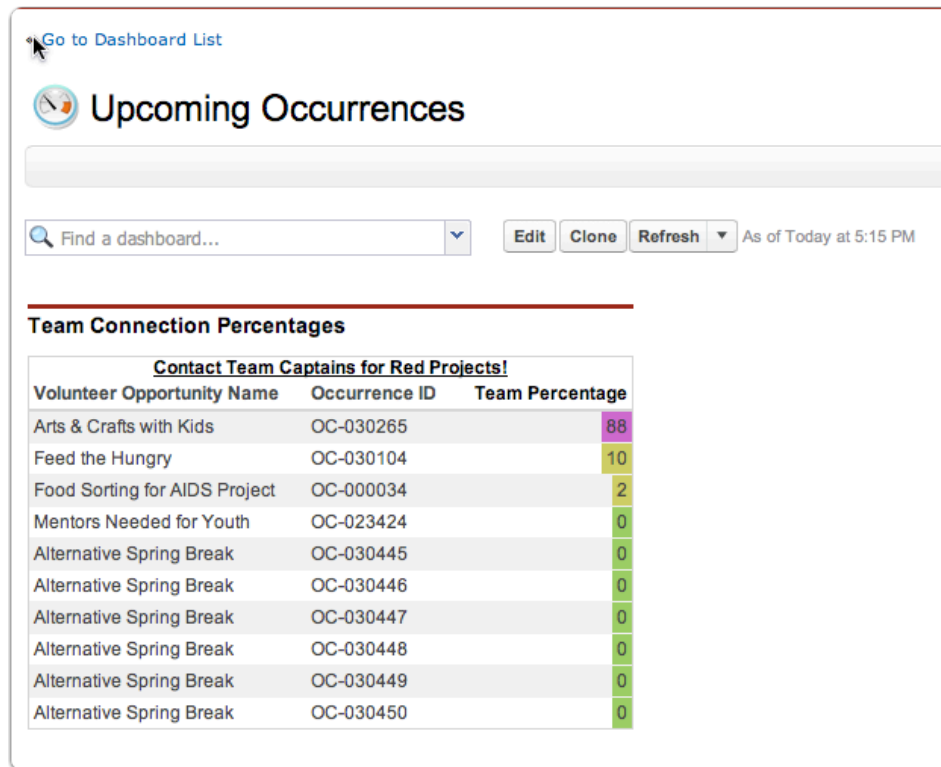
Here's how my report looks when I run it. (Note: It shows ALL upcoming occurrences, whether or not they have ANY team connections at all -- but the number of connections remains at zero.)

					0			0%
					-	30	-	
Volunteer Opportunity Name: <u>Arts & Crafts with Kids</u> (30 records)					7			
Occurrence ID: <u>QC-030259</u> (1 record)					0			0%
					-	8	-	
Occurrence ID: <u>QC-030260</u> (1 record)					0			0%
					-	8	-	
Occurrence ID: <u>QC-030261</u> (1 record)					0			0%
					-	8	-	
Occurrence ID: <u>QC-030262</u> (1 record)					0			0%
					-	8	-	
Occurrence ID: <u>QC-030263</u> (1 record)					0			0%
					-	8	-	
Occurrence ID: <u>QC-030264</u> (1 record)					0			0%
					-	8	-	
Occurrence ID: <u>QC-030265</u> (7 records)					7			88%
<u>CQ-087381</u>	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A000000hCYty	1	8	Volunteer	Cathy Cheese
<u>CQ-087380</u>	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A000000hCYtx	1	8	Volunteer	April Adams
<u>CQ-087379</u>	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A000000hCYtw	1	8	Volunteer	Doug Doggy
<u>CQ-087378</u>	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A000000hCYtv	1	8	Volunteer	Bob Barker
<u>CQ-087377</u>	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A000000hCYtu	1	8	Volunteer	Frank Fox
<u>CQ-087376</u>	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A000000hCYtt	1	8	Volunteer	Edna Edison
<u>CQ-087375</u>	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A000000hCYts	1	8	Volunteer; Team Captain	Valerie Volunteer
Occurrence ID: <u>QC-030266</u> (1 record)								

Notice that I can now clearly see that the occurrence of Arts & Crafts with Kids on July 15 has 88% of its available slots taken up by team connections. So I'm going to give team captain, Valerie Volunteer a call and make sure she is planning to show up with all the team members she signed up!

Whether you want to filter out TBS or all express interest occurrences is up to you! Just build the report out to meet your actual business needs when it comes to monitoring team connections.

Optionally - you can create a dashboard component to make it easy to keep an eye on upcoming opportunities with a high percentage of team volunteers coming up.



For the dashboard component type shown above, you need to add a chart to your report -- and then build the dashboard component to meet your needs. Clicking on the dashboard component would take me to the report itself.

I could additionally filter my report to only show connections or occurrences coming up in the current month, etc... as a way of keeping only the most relevant and immediate data out front for me to think about.

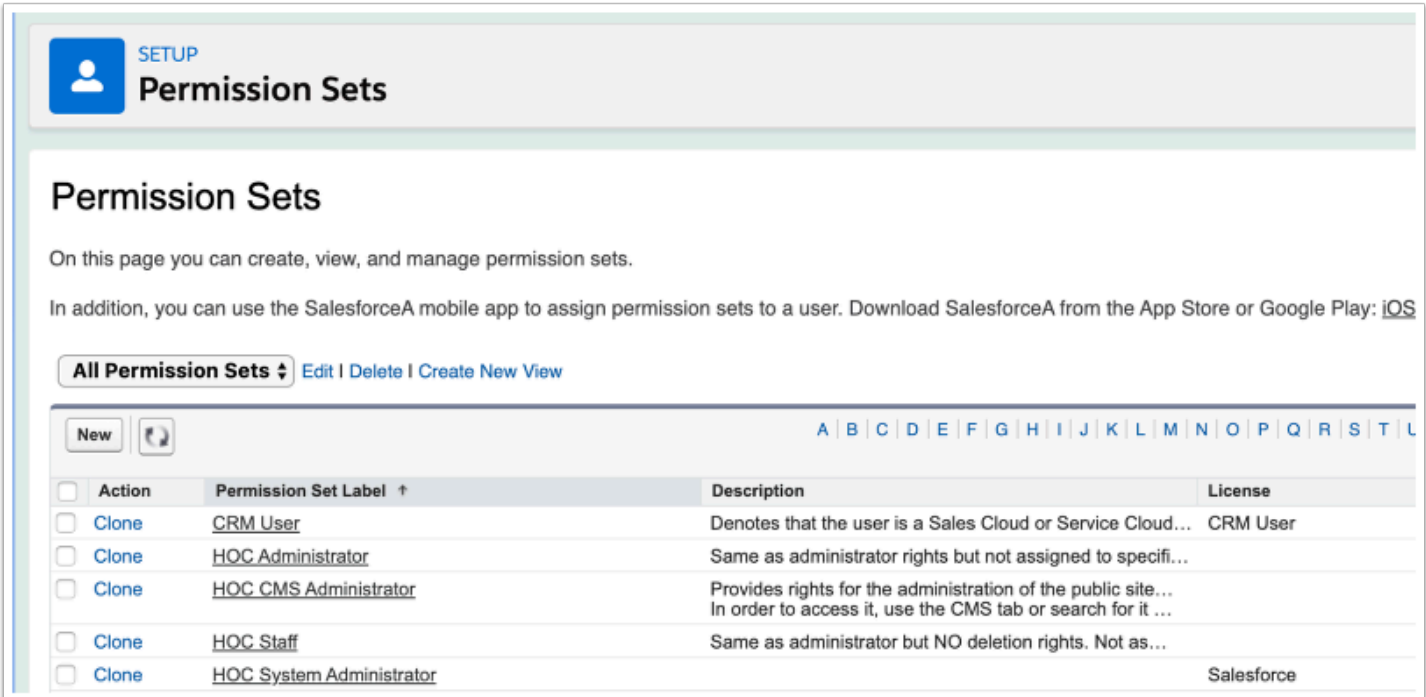
Granting HOC Access to other Salesforce Profiles

Granting HOC Permissions via Permission Sets

The standard profiles for HandsOn Connect users are "System Administrator" and "Staff". In some instances of Salesforce your HOC users might have a custom profile created by your organization. In this case, you may not be able to access some of the elements of HandsOn Connect.

In order to have HOC access, if you have a different profile, you can a permission set to that user, which will grant them the appropriate HOC permissions.

There are Four Permissions sets available to system administrators to assign to a Salesforce User:



SETUP
Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#)

All Permission Sets | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label	Description	License
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud...	CRM User
Clone	HOC Administrator	Same as administrator rights but not assigned to specifi...	
Clone	HOC CMS Administrator	Provides rights for the administration of the public site... In order to access it, use the CMS tab or search for it ...	
Clone	HOC Staff	Same as administrator but NO deletion rights. Not as...	
Clone	HOC System Administrator		Salesforce

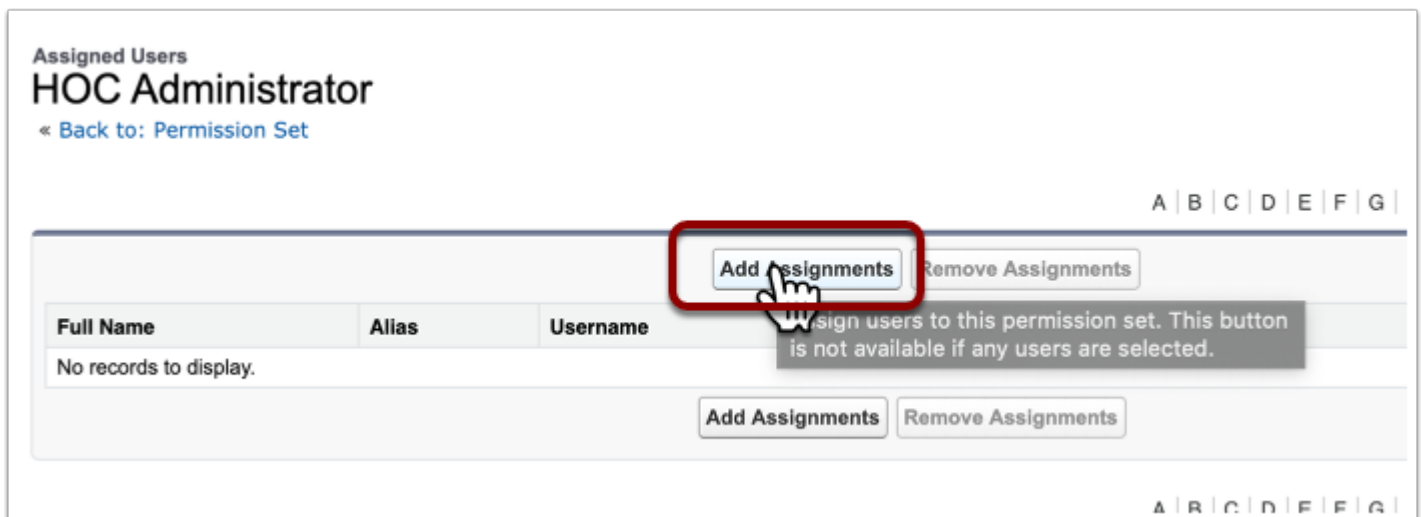
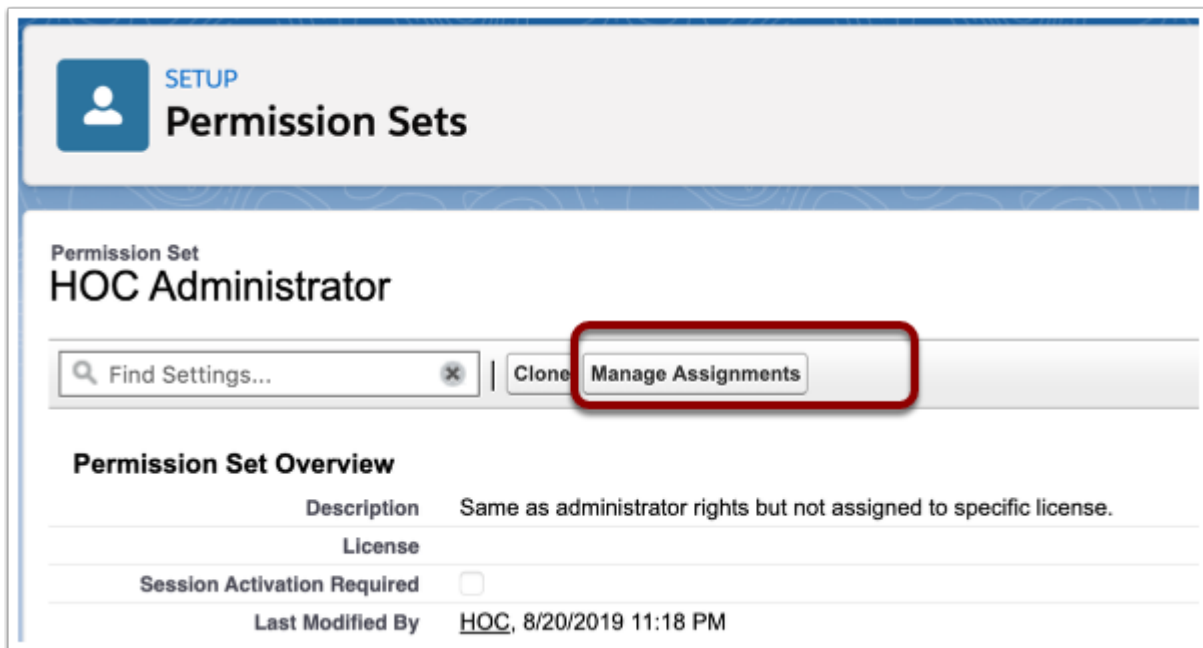
The Four Permission sets available

- HOC System Administrator - Grants a user with a full Salesforce license, System Administrator access to HOC
- HOC Administrator - Grants a user with any other kind of Salesforce license (i.e. Profile), System Administrator access to HOC
- HOC Staff - Grants a user Staff access to HOC. (i.e they do not have permission to delete records or edit email templates, etc.)
- HOC CMS Administrator - Grants a user access to the HOC CMS.

To assign a Permission Set to a user:

Go to setup / permission sets, and click on the permission set you wish to assign. Click on Manage Assignments.

Then Click on Add Assignments



Put a checkbox next to the User(s) you wish to assign the permission set to. And click the Assign button. (Then Click Done)

Assign Users

Admin Users

View: Admin Users Edit | Create New View

Assign Cancel

<input type="checkbox"/> Action	Full Name	Profile	Username
<input type="checkbox"/> Edit Login	Stephens-Leslie, Lorraine	System Administrator	lorraine@feedingsouthflorida.org
<input type="checkbox"/> Edit Login	Bonet, Ruth	System Administrator	fsf2017@gmail.com
<input type="checkbox"/> Edit	HOC Admin, 0182	System Administrator	client0182@handsonconnect.org
<input checked="" type="checkbox"/> Edit Login	Vatske, Sari	System Administrator	svatske@feedingsouthflorida.org
<input type="checkbox"/> Edit Login	Rodriguez, Ivonne	Staff	irodriguez@feedingsouthflorida.org
<input type="checkbox"/> Edit Login	Volunteer Coordinator, FSF	Staff	volunteers@feedingsouthflorida.org
<input type="checkbox"/> Edit	Wortsman, Alana	System Administrator	awortsman@feedingsouthflorida.org

HandsOn Connect Lightning

Activating Lightning

The native Lightning Version of HandsOn Connect is being added as part of the Dec 2018 / Jan 2019 release of HandsOn Connect. This means its ready to be configured and used when you decide to start using Lightning in your Salesforce instance. Here's what you need to do to activate lightning and start using HandsOn Connect in Lightning

! If you previously had the unmanaged package version of HOC Lightning installed by us during 2018, you do not need to switch to HandsOn Connect Lightning (the name of the 'managed' version of HOC Lightning). The HOC Lightning app has already been configured for you - and you can continue to use it.) No action or configuration is needed on your part.

💡 Note: You may also see an app available in lightning called simply "HandsOn Connect" -- this is the 'classic' version that SF automatically creates for you, and is NOT one you want to use (it requires considerable manual setup and configuration as a 'migrated' app and won't fully support lightning.

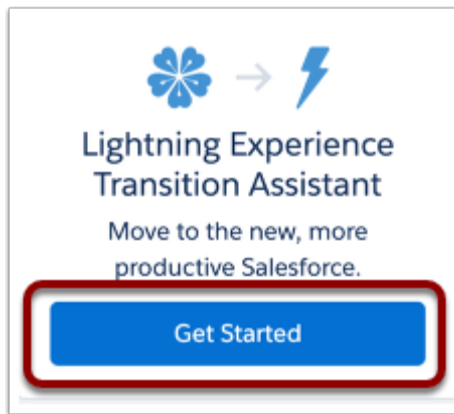
💡 With each Salesforce release, Salesforce changes the process of making the transition to Lightning. These instructions relate to the Lightning Migration process as available in Spring' 2019. This may change in the future - but however its presented, the things you need to 'activate' and be aware of will be the same as to what's indicated in these notes.

Enable Lightning in your Instance

If you've not yet activated lightning in your Salesforce Instance, follow all the steps below.

If you HAVE enabled Lightning, you can review this info but skip down to [make-the-application-handson-connect-lightning-available-to-user-profiles](#)

To get started: Go to Setup / and click on Lightning Experience Transition Assistant "Get Started"



Lightning Experience Transition Assistant

Lightning Experience Transition Assistant

The Path to Lightning Experience

The Transition Assistant guides you through your company's journey to Lightning Experience.

For easier manageability, we break up the transition into three phases. Come here during each phase to get step-by-step guidance and tools that speed you through the process.

Follow the Path

1

Discover Phase

Understand the benefits, assess readiness, and align with stakeholders.

[Go to Steps](#)

2

Roll Out Phase

Plan your rollout strategy, prepare your org, start change management activities, then go live!

[Go to Steps](#)

3

Optimize Phase

Drive adoption, measure success, and keep iterating to deliver the best experience.

[Go to Steps](#)

Discover Phase (1)

This step gives you background information about Lightning, offers videos, and invites you to join the lightning now community. There are three sections - and while we recommend perusing this, there is nothing you have to do here. You can skip this step, as we've already determined that HandsOn Connect is lightning ready for you to use.

Roll Out Phase (2)

More useful stuff here about planning how to prepare your organizational users for switching to lightning. Again - this is largely informational and most of it can be skipped. We DO recommend doing the following however:

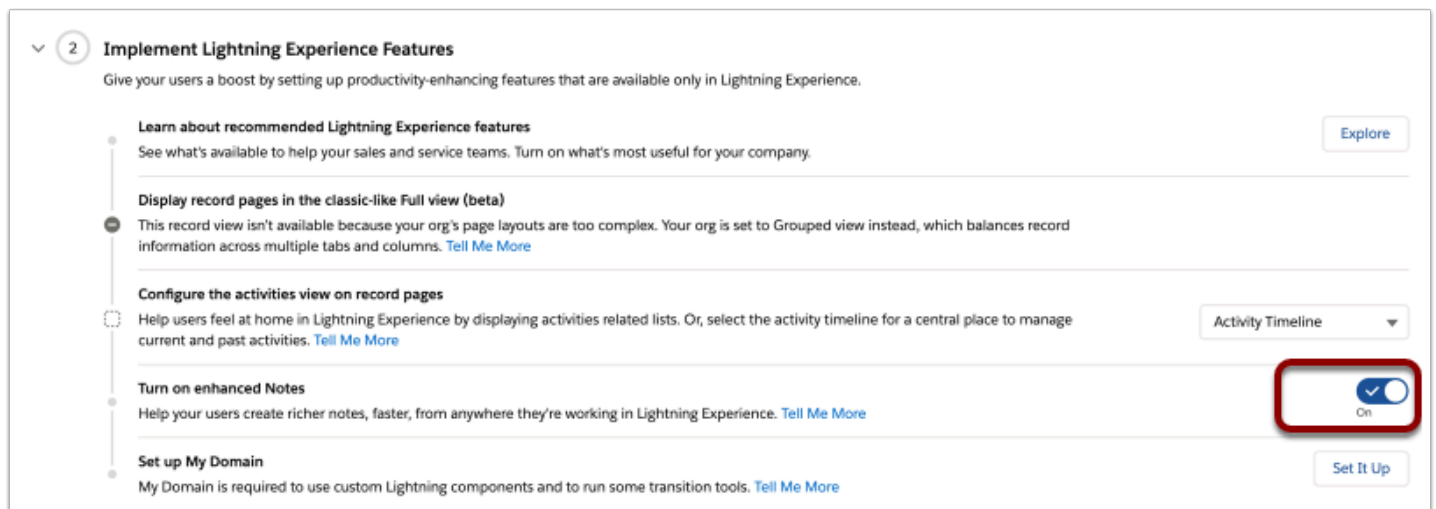
In Step 2 - "Implementing Lightning Experience Features --

1) Feel free to click on Explore and learn a bit about the latest lightning experience features, but you don't have to read this now if you just want to get set up. Here's what we recommend you do to get started:

2) Display record pages in the classic-like Full View (Beta). You can do this later if you feel you want to maintain more of the look of classic -- but for now, since this is a beta and unsupported -- just ignore it.

3) **Configure the Activities View on record pages** -- Activity Timeline is an improved way of looking at activities - and we recommend choosing it. Click on Tell me More if you want to see the other option which is "Related Lists" (again - more like classic). Either option is OK depending on how you use activities.

4) Turn on Enhanced Notes:



2 Implement Lightning Experience Features

Give your users a boost by setting up productivity-enhancing features that are available only in Lightning Experience.

- Learn about recommended Lightning Experience features**
See what's available to help your sales and service teams. Turn on what's most useful for your company. [Explore](#)
- Display record pages in the classic-like Full view (beta)**
This record view isn't available because your org's page layouts are too complex. Your org is set to Grouped view instead, which balances record information across multiple tabs and columns. [Tell Me More](#)
- Configure the activities view on record pages**
Help users feel at home in Lightning Experience by displaying activities related lists. Or, select the activity timeline for a central place to manage current and past activities. [Tell Me More](#) Activity Timeline
- Turn on enhanced Notes**
Help your users create richer notes, faster, from anywhere they're working in Lightning Experience. [Tell Me More](#) On
- Set up My Domain**
My Domain is required to use custom Lightning components and to run some transition tools. [Tell Me More](#) Set It Up

! Later on -- If you want to be able to add notes to your records - you can add the new "Notes" related list to your page layouts and remove the old "Notes and Attachments" from previous layouts.

If you have previous notes and attachments, you can migrate them to the new preferred 'notes' format (which are files) as recommended when using lightning.

[Here's a link to how to migrate your old notes to the new format:](#) OR -- you can leave

the old notes and attachments there (for easy access to legacy notes) and use the new "Notes" related list for your notes going forward. (And sometime in the future you can migrate your old notes if desired).

5: Set up My Domain - This is highly recommended for all Lightning users. Simply follow the directions and pick a permanent URL for your domain:
Its not required (yet) for HandsOn Connect, but is recommended in order to have access to all of Lightning's features. Its painless to set up and activate.

(Note: choose your my domain name carefully, as it can't be changed after you set it up)

Your domain name can be anything of your choosing and takes the form of <https://unitedwayflorida.my.salesforce.com> for example.

💡 Don't worry about this now -- but once MyDomain is activated, you can have users log into Salesforce at either login.salesforce.com (as before), OR at your new URL (such as the example above).

You can customize this custom login page to make it match your brand, by adding your logo and colors to your organizational salesforce login page. For instructions on doing this (later) -- see this article: https://help.salesforce.com/articleView?id=domain_name_login_branding.htm&type=5

Step 3 - Adjust Existing Customizations:

If HandsOn Connect is your only application you don't need to do any of this, and all of it can wait until later. Some of this may be helpful IF you have other apps installed and/or you've created custom buttons, etc.

The HandsonConnect managed lightning app has already taken care of replacing missing actions and buttons, converting javascript, and preparing Visualforce pages for Lightning experience, so you can skip Step 3 entirely for now.

💡 We do recommend you convert your existing attachments and classic notes to Salesforce Files and Notes. But you can do this later, AFTER you've added the notes related list to your page layouts) So skip this for now. Its part of customization you'll choose to do at a later date and make sure any notes and attachments you had previously used in Classic are converted to the new improved format.

In Step 4: Launch Lightning Experience: Do the following:

Fine-Tune who can access Lightning Experience -- read this section and learn how you can control who can and can't access lightning experience for now. This page provides instructions on deciding who in your organization can and can't use lightning right now, and how often people are prompted to stay in Lightning. Depending on how you want to 'roll out' lightning for your users - you can make choices here. The page is fairly self-explanatory, so read through the options and configurations.

Option: Make Lightning Experience the default interface - We don't recommend making lightning the default interface, yet! This way, people will still log into classic - and can CHOOSE to switch over to lightning so they can get more familiar with it. (Starting on October 11, 2019 however, Salesforce will make Lightning the default interface for all system administrators!)

Turn on Lightning Experience -- turn it on! You're ready to start using Lightning.

If it's not already been turned on, Flip the switch and Enable Lightning!

Optimize Phase (3)

Nothing you have to do here. But this section is full of good information on motivating users to start using lightning instead of classic. Come back to this later as you plan your lightning rollup with the rest of your users.

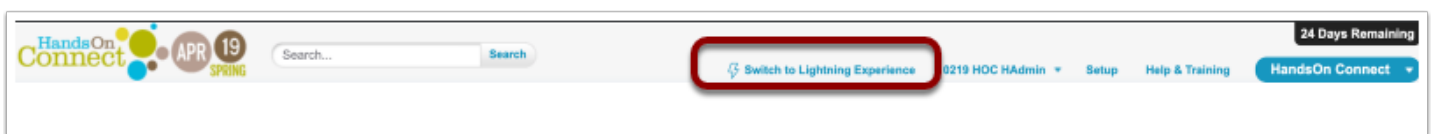
For now: We're ready to start setting up the HandsOn Connect Lightning app for use in Lightning!

See the next article - [Granting Access to HandsOn Connect Lightning](#)

Granting Access to HandsOn Connect Lightning

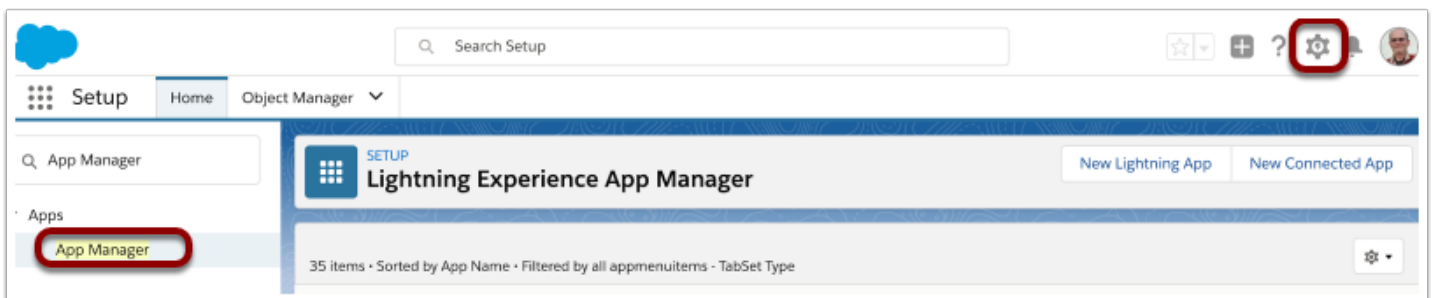
Once lightning has been enabled - there's just a few things you'll need to do to start using HandsOn Connect Lightning. First off - grant access to the application to your users. Here's how!

If you're not already in lightning - click on "Switch to Lightning Experience" at the top of the page:



Make the application "HandsOn Connect Lightning" available to user profiles

In your new lightning interface, go to setup (click the cog in the upper right", and in the 'quick find' box type "App Manager" and then select it. (This is where you'll find all the Apps installed in your instance of Salesforce)



You will find several applications with names like "HandsOn Connect..." or "HOC...." The one we want to configure is called "HandsOn Connect Lightning". Click on the right drop-down triangle and then select "Edit".

10	Google AdWords	GoogleAdWords	Provides Google AdWo...	12/21/2017 11:47 AM	Classic (Managed)	
11	HandsOn Connect Lightning	HandsOn_Connect_Lig...	HandsOn Connect Ligh...	12/21/2018 7:07 AM	Lightning (Managed)	✓
12	HOC Classic	HandsOn_Connect		12/21/2018 7:07 AM	Classic (Managed)	
13	HOC Lightning	HandsOn_Connect_Lig...	This is the native lighni...	11/27/2018 1:16 PM	Lightning	
14	HOC REST App	HOC_REST_App		1/8/2018 2:36 PM	Connected	

i Curious about what the other "HOC" apps you might see here? Here's what each of them represents:

- 1) **HandsOn Connect Lightning** - This is the lightning native version of HandsOn Connect which is now part of the 'managed' HOC application. This is the one you're going to configure unless you already have had the HOC Lightning (unmanaged) package installed by support.
- 2) **HOC Classic (or, it may be simply labeled "HandsOn Connect")** -- this is an automatic conversion of any existing application that Salesforce does when you activate Lightning. You'll notice that the app type is "Classic (Managed)". This means they've brought over to the classic version of the HandsOn Connect app as best they could, and a system administrator would have to configure the app to a great degree to make it work in lightning. "Classic" apps have certain limitations in lightning -- and Salesforce strongly suggests you switch over to Lightning apps instead. You can ignore this app as you won't be using it - as we're providing you with a native lightning version of HandsOn Connect!
- 3). **HOC Lightning** -- this will only be available if you had support install a native lightning version of HandsOn Connect before this release. It is an unmanaged package, which was configured for you when you requested the install. If you have this installed - you can and should continue to use this version instead of "HandsOn Connect Lightning)
- 4) **HOC REST app** (or in some instances simply **REST App or REST Application**) - this is a package that enables HOC to work with the HOC public site. You can, and should, ignore this app.

For now - let's get back to customizing the HandsOn Connect Lightning app. Select Edit and then:

Configure the HandsOn Connect Lightning app to allow access to the User Profiles who use HandsOn Connect.

Select "User Profiles" in the left menu, and then move the profiles who use HandsOn Connect from the available column, to the Selected Profiles column. Then Click Save.

For most HandsOn Connect clients, the two profiles you should make the app available to are:

1. System Administrator
2. Staff

If other profiles in your SF organization use HandsOn Connect add them as well.

💡 You do not need to add profiles such as Partner Staff, Volunteer, or Volunteer Leader. They are hold-overs from HOC v2 and no longer used since the HOC public site and sharing portal are not part of Salesforce.

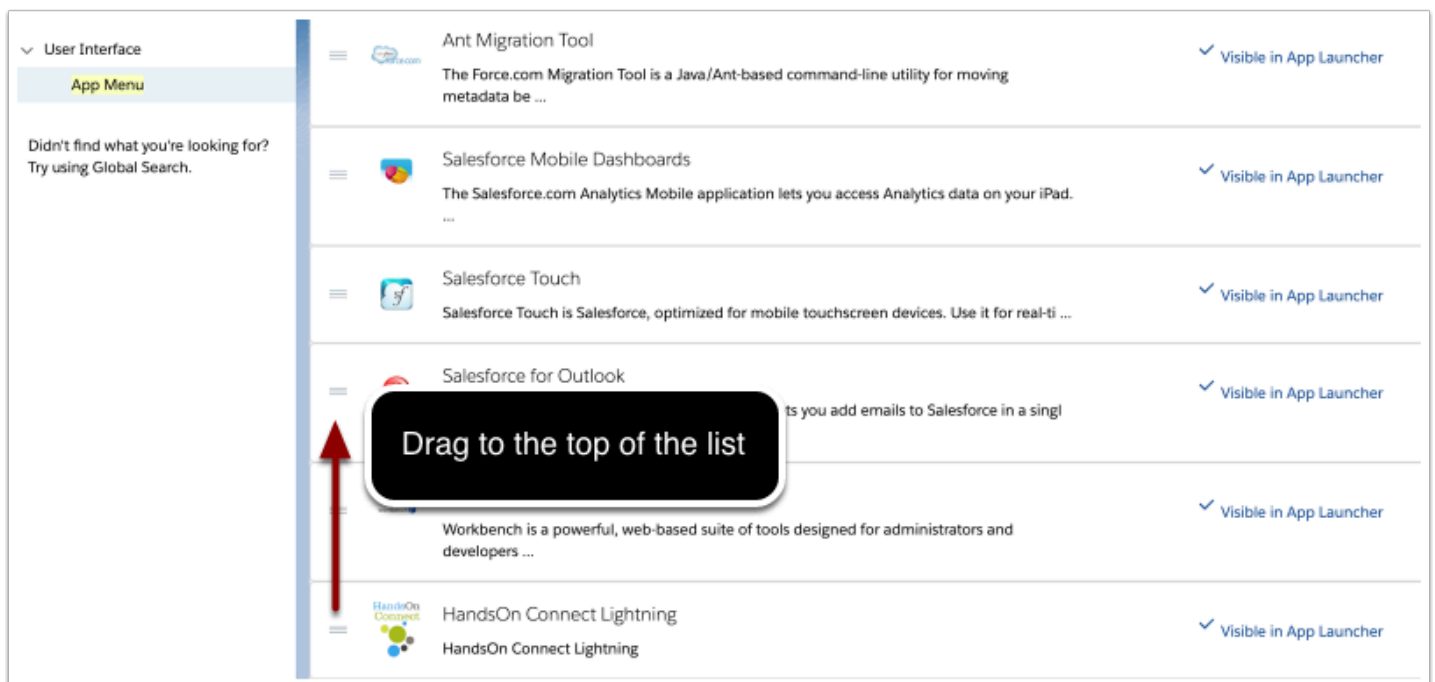
Click the Back Link at the top of the page to get back to Setup:

(recommended) Reorder and hide apps in Lightning

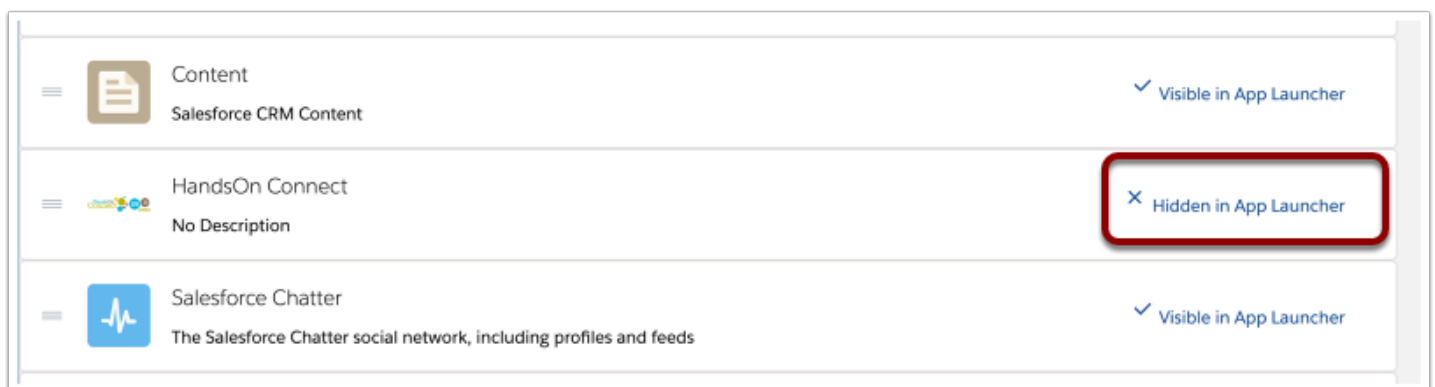
We want it to be clear to our users which HandsOn Connect application to use, so we'll move HandsOn Connect Lightning to the first position, and we'll hide the unneeded "HandsOn Connect" (classic app) from the menu picker.

To do this, in Setup go to **App Menu**

Scroll and find "HandsOn Connect Lightning" and grabbing the three lines to the left, drag it up to the top position on the page:

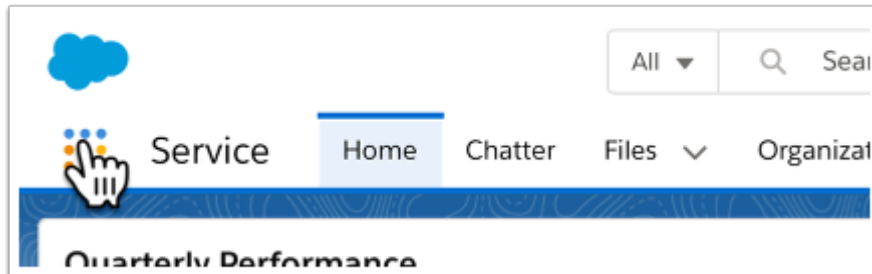


Now.... look for the application "HandsOn Connect. (No description) -- this is the classic app we wish to hide. To do this, click on the words "Visible in App Launcher" so that it changes to "Hidden in App Launcher"

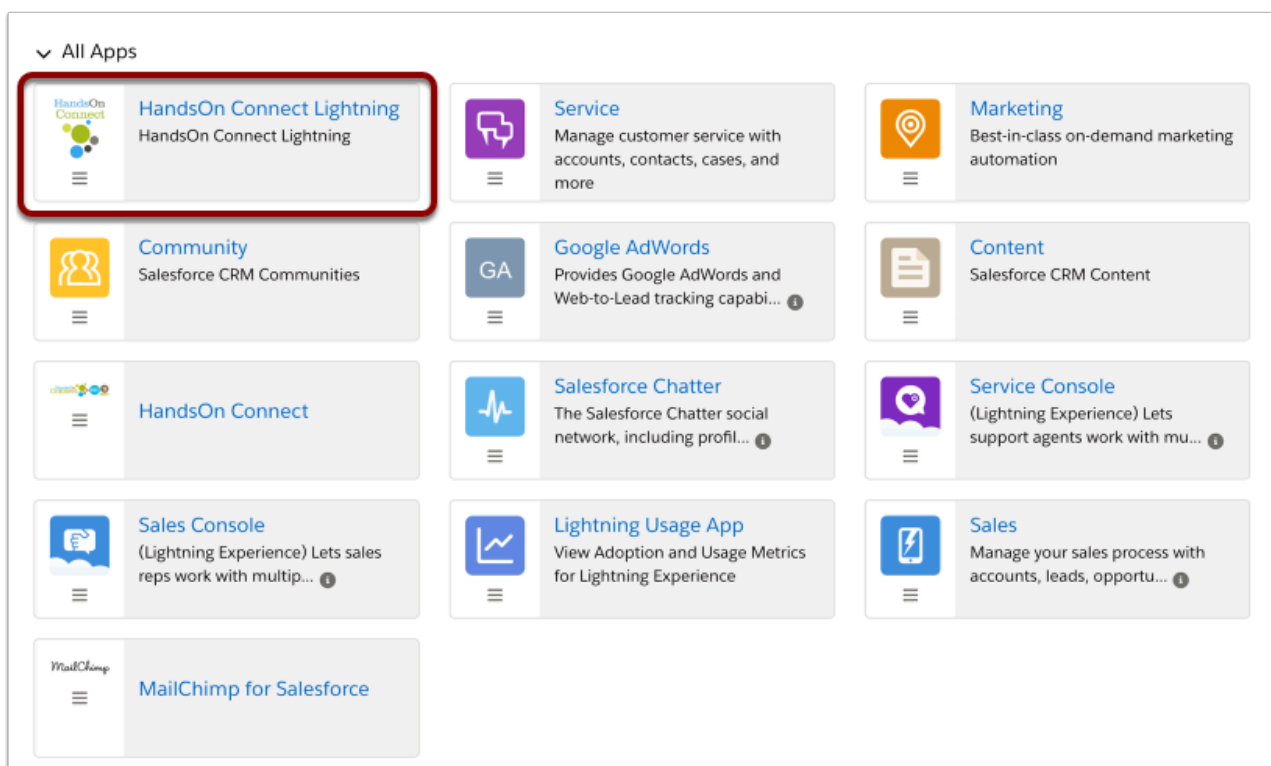


You'll now be able to see HandsOn Connect Lightning in the first position of the App Switcher.

Click on the app switcher in the upper left of your lightning navigation (9 dots). (This is how you select which app you want to use in the lightning environment)

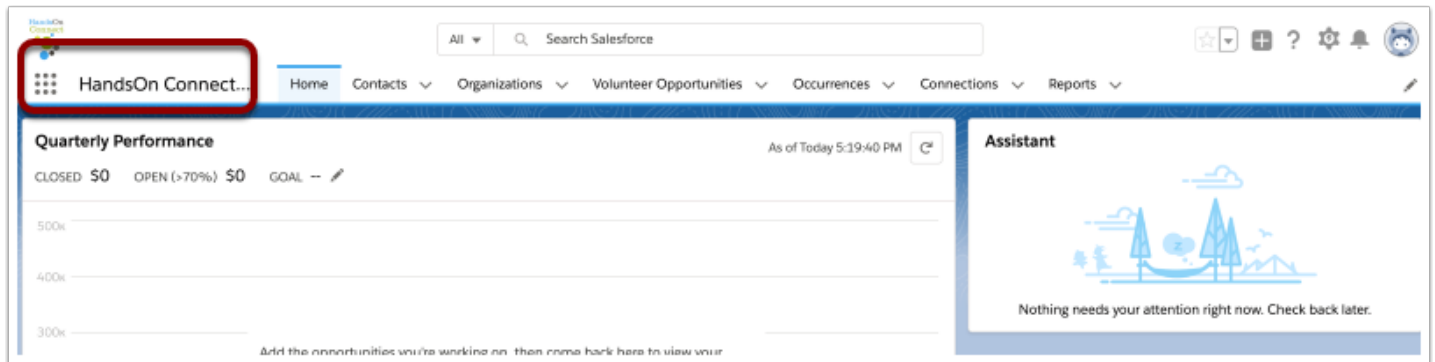


💡 Note: If HandsOn Connect Lightning is not the principal application your users will be using, you can set the order however you like. Remember though, that individual users can change the default order at any time for themselves by dragging the cards from one position to another :-). All you've done is set the default order for when folks start using lightning.



To start using HandsOn Connect Lightning - just click on the top left tile (or wherever you placed it :-)

This is how you select an app in lightning. You'll know which app you're in because it will then appear in the upper left:



But let's make the HomePage something more useful than the lightning default homepage.

[Click here to learn about customizing the home page.](#)

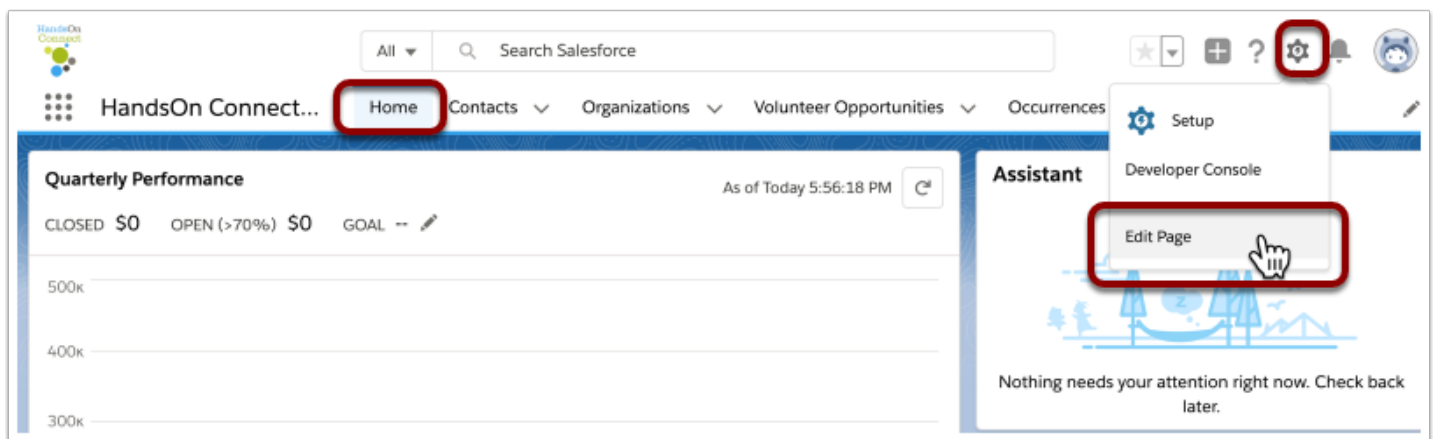
Configuring HandsOn Connect Lightning (Pt 1) Home Page

There are a few things you'll want to do to set up HandsOn Connect Lightning. Follow the steps here for our suggested configuration.

Note however - that all of this is optional - you can start using HandsOn Connect Lightning right now with no further configuration.

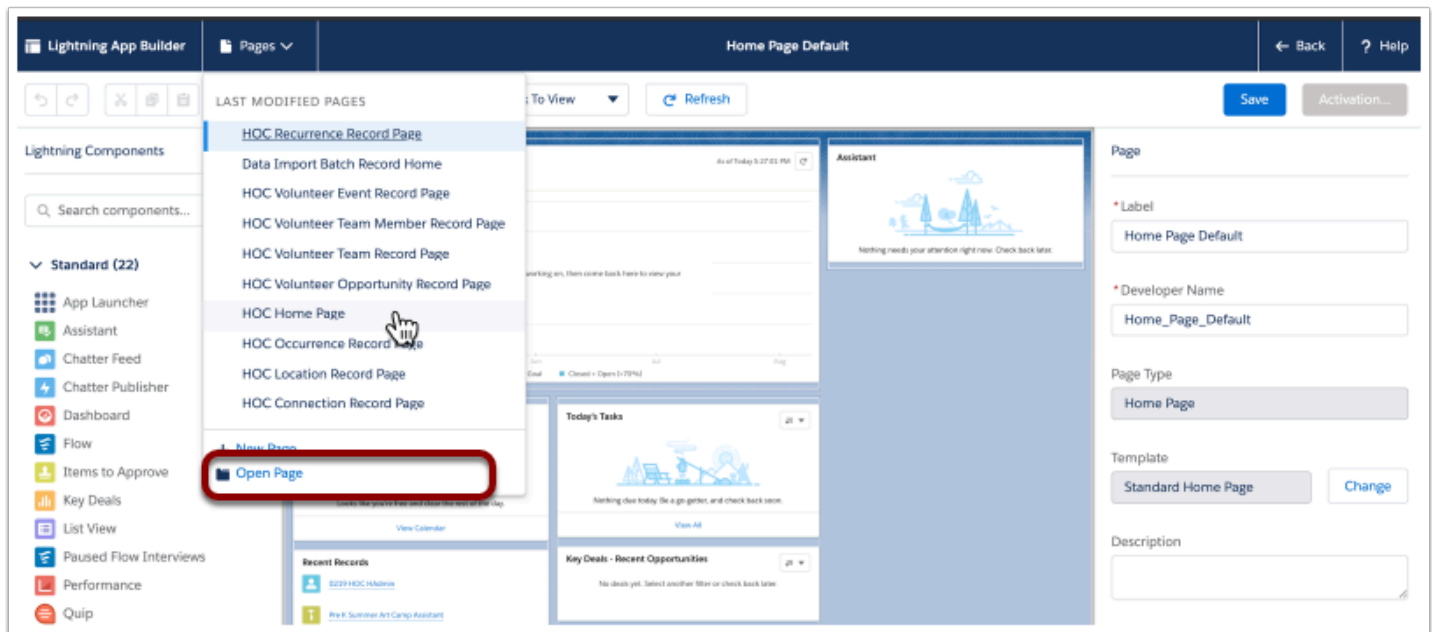
Customize and Assign the HandsOn Connect Home Page as your default Home Page:

While on the home page tab - Click on the cog and select edit page. This will take you to the Lightning App Builder where you can edit lightning pages:



In the Lightning App Builder - click on the "Pages" Menu and select Open Page.

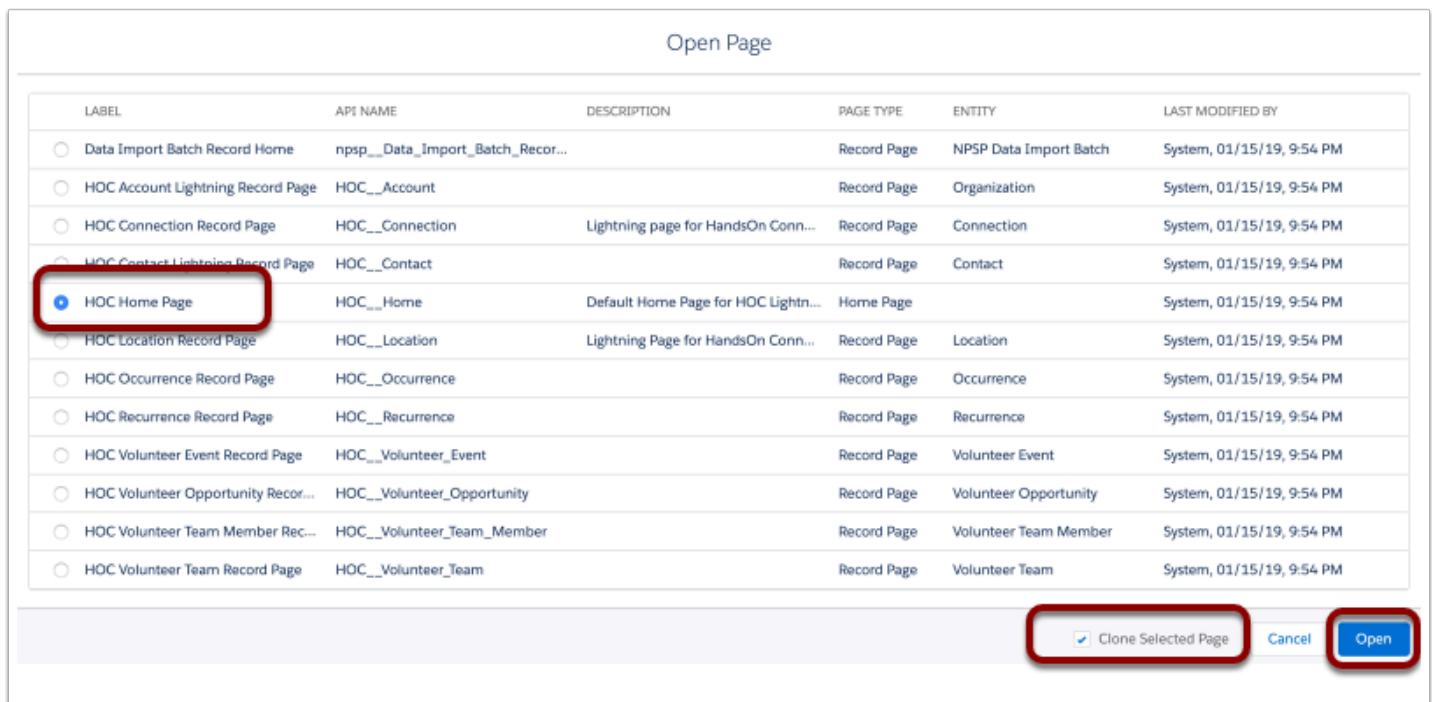
(You'll be asked "Are you sure you want to navigate away from this page? You'll lose any unsaved changes". That's OK, because we don't care about this default home page we were seeing. Click **Confirm**.



What you'll see here is a list of all the HOC Record Pages that are part of the HandsOn Connect Lightning application. You can't edit any of them directly (because they are part of a managed package). So if you want to change any of the lightning page layouts going forward, you'll clone the page we've provided, and make your edits there.

We'll start by cloning the HOC Home Page

To do this, select HOC Home Page, and check the 'Clone Selected Page' box, and then Click "OPEN"

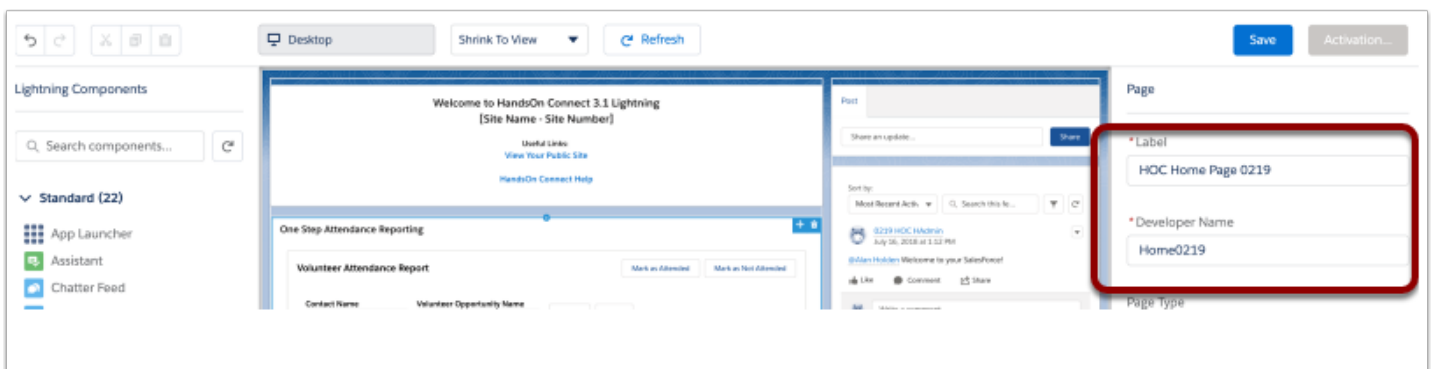


Editing the Cloned Home Page

In the right column of the lightning page layout:

- 1) Rename the Label of the page from HOC Home Page to HOC Home Page XXXX. (Where xxxx is your HOC Client ID or your organization name). It doesn't matter really what you name it - but its helpful to identify it so you know its YOUR version of the HOC Home Page. Use the same naming convention for any custom pages you create in the future so you know its your version!
- 2) Rename the Developer Name. (the developer name can't have any spaces in it)

For example: In HOC Instance 0219 I am renaming HOC Home Page to HOC Home Page 0219 and the Developer name to Home0219.



! If you don't know your HOC client number - ask us. Or go to Users in Setup and you'll see a user named clientXXXX@handsonconnect.org. The XXXX is your client number.

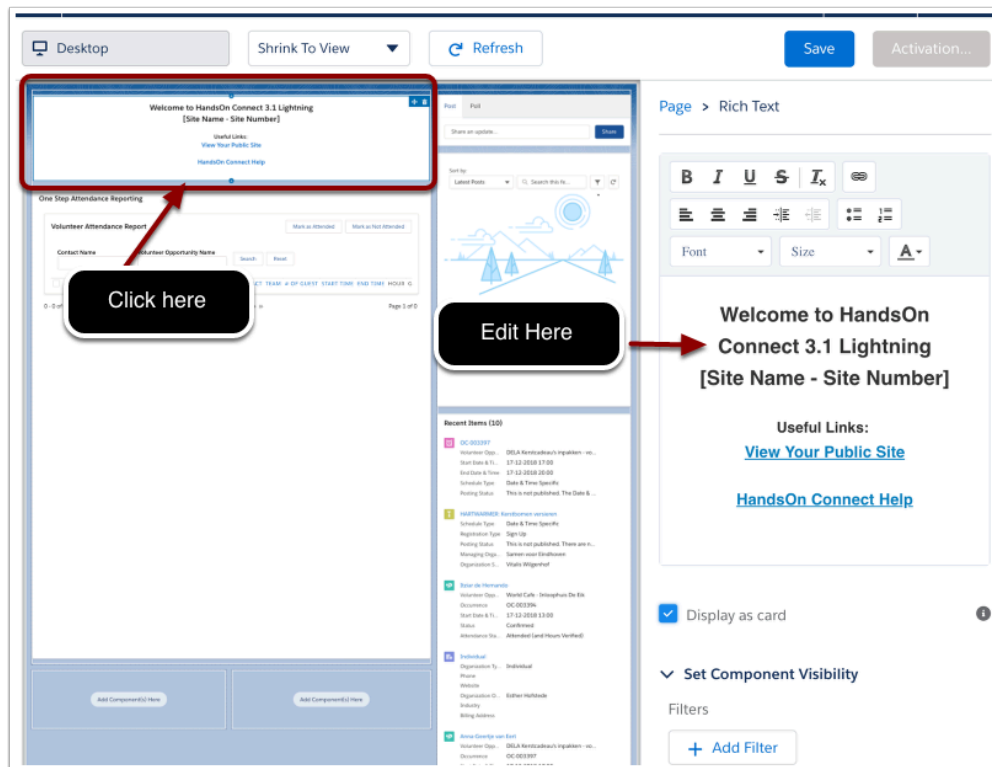
Adding your client number helps us when we're doing support for you as we know what instance of Salesforce we're in.

Click on the top center section of the page layout. This is the Rich Text Component of the Page:

Click on that 'component' in the lightning page, and after a few seconds the component will appear on the right side of the page ready for you to edit. It sometimes takes up to 10 - 15 seconds before the WYSIWYG for the rich text appears. So wait for it to show up like this:

Click on that 'component' in the lightning page, and after a few seconds the component will appear on the right side of the page ready for you to edit. It usually takes about 10 - 15 seconds before the WYSIWYG for the rich text appears. So wait for it to show up like this:

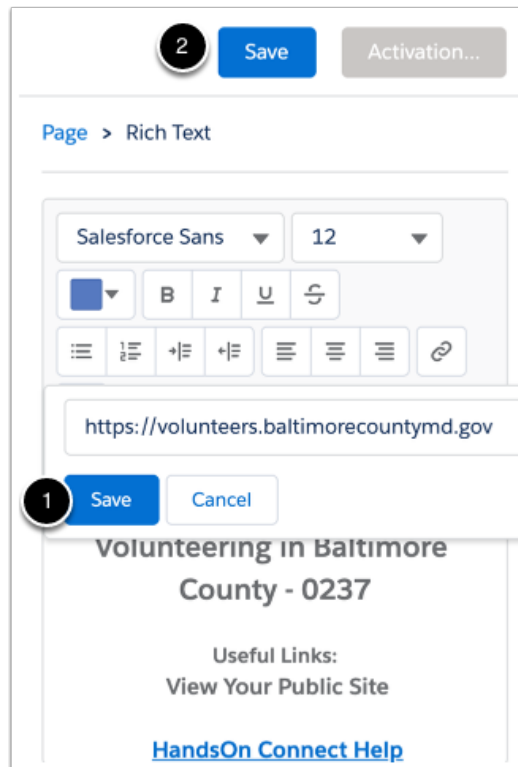
On the right side you'll see the text that appears in the upper component on the page. You'll edit this content by working on the right side where the content appears:



Make the following Edits to the Page:

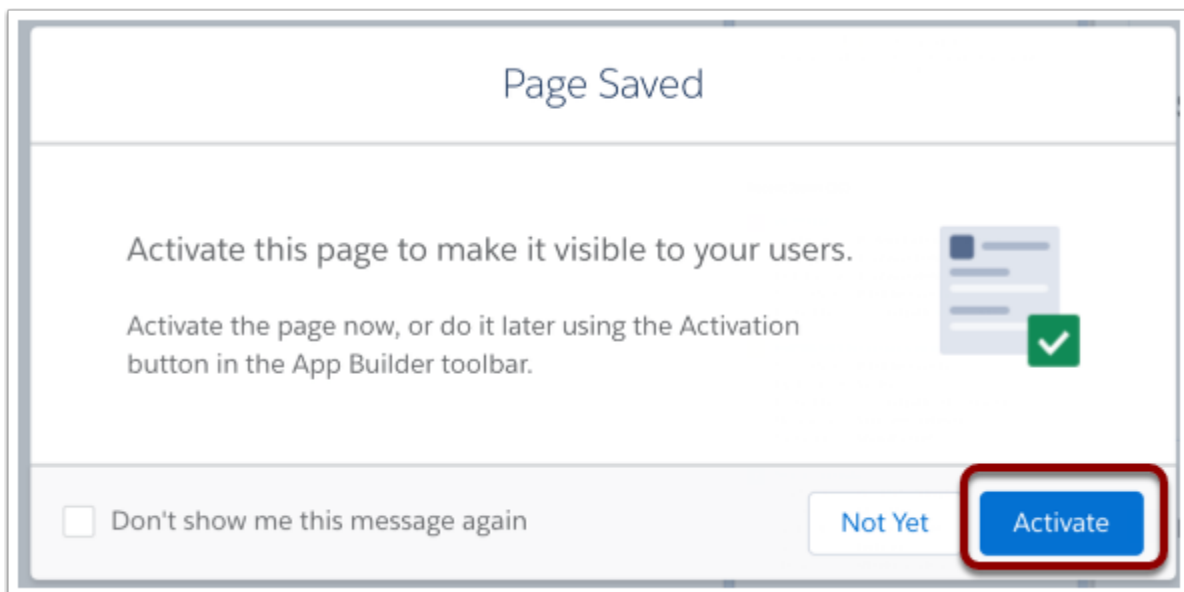
- 1) Change the "Welcome to HandsOn Connect 3.1 Lightning" to whatever you choose. We recommend the simpler "Welcome to HandsOn Connect Lightning" but you can put whatever you like (or change it in the future after people have gotten used to the new lightning version of HOC).
- 2) Where it says [Site Name = Site Number] we recommend putting the name of your organization - and then your HOC Client number
- 3) Select the text / link "View Your Public Site" - and using the WYSIWYG editor link it to the URL of your public site. (Click on the link icon and edit the site URL). This makes it easy for your users to quickly get to the public site :-). Don't forget to set it to https://

Click Save to save your link, and then Save in upper right, to save the edited page.



You'll now need to activate your page

Depending on when you last saved, you will either be automatically asked to activate the page, or need to click the 'Activation' Button.



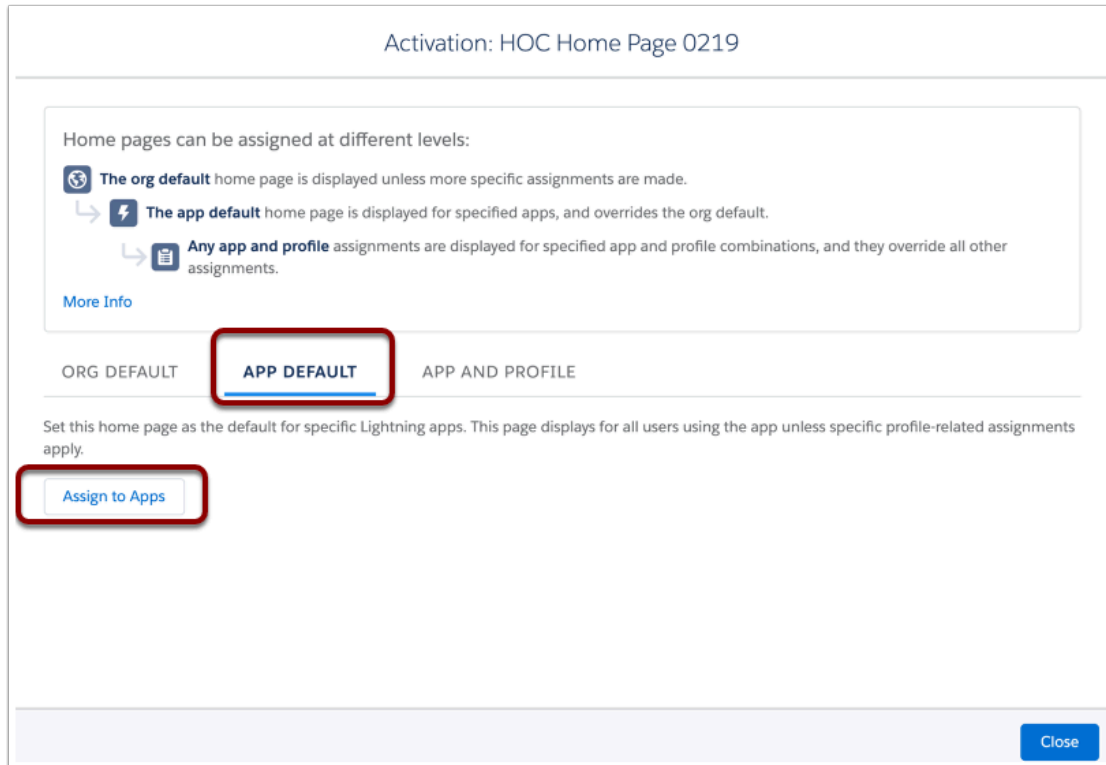
You now have the option to make this page either:

1) The organization default. (Select this if its the only lightning app you'll be using for your organization)

2) The App Default. (We recommend this choice. As it'll make this the home page when using HandsOn Connect Lightning.

3). Any app and Profile (if you want to have different home pages when using this app for users with different profiles).

For now, we'll select App Default. Click that tab and then click on "Assign to Apps"



You'll see a list of all lightning apps. Select "HandsOn Connect Lightning" as the app you wish to use this home page for. (You can optionally assign this page to any other app as well). Click Next

Select Apps

Selected Lightning apps display "HOC Home Page 0219" as the home page.

APP NAME	DESCRIPTION
<input checked="" type="checkbox"/> HandsOn Connect Lightning	HandsOn Connect Lightning
<input type="checkbox"/> LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience
<input type="checkbox"/> Sales	Manage your sales process with accounts, leads, opportunities, a...
<input type="checkbox"/> Sales Console	(Lightning Experience) Lets sales reps work with multiple records ...
<input type="checkbox"/> Service Console	(Lightning Experience) Lets support agents work with multiple re...

Lightning Apps (5) 1 Selected

Cancel Back Next

You'll be asked to review your assignments, and then click SAVE, and you'll be returned to the HOC Home Page XXXX you created.

Click on Back to return to Salesforce - (You may need to refresh your browser a couple of times, and your new version of the Home Page will show up as the default home page.

Lightning App Builder Pages HOC Home Page Dec 2018

← Back ? Help

Save Activation...

Lightning Components

Search components...

Standard (21)

- App Launcher
- Assistant
- Chatter Feed
- Chatter Publisher
- Dashboard

One Step Attendance Reporting

Welcome to HandsOn Lightning
Savien voor Eindhoven 0202

Volunteer Attendance Report

Mark as Intended Mark as Not Intended

Contract Name Volunteer Opportunity Name Search Reset

CONNECTION VOLUNTEER OPPORTUNITY OCCURRENCE CONTACT TEAM # OF GUEST START TIME END TIME HOUR G

0-0:00 Previous Page Page 0:00

Page

* Label
HOC Home Page Dec 2018

* Developer Name
Home1

Page Type
Home Page

(Optional) You can continue to edit or add to your home page as desired:

Now that you have your own version of the HOC Home Page - you can always edit it and add additional components.

We've started you out by putting the "One Step Attendance Reporting": Visualforce component on the home page.

For example: You can add any of the following to the home page by adding components. Just drag an item from the "Lightning components tray on the left -- onto your home page layout.

1) Add a favorite report chart that is relevant to your organization. (Use the Lightning component "Report Chart") and choose the report you wish to display

The screenshot shows the Salesforce Lightning Components tray on the left, with a red arrow pointing to the 'Report Chart' component. The main area displays a dashboard with a 'Volunteer Engagement Report' chart. A red box highlights the 'Report Chart' configuration panel on the right, which includes the following settings:

- Page:** Report Chart
- Label:** # of Connections per Volunteer Opportunity
- Report:** Volunteer Engagement Report
- Filter By:** (Empty dropdown)
- Cache Age (in minutes):** 1440
- Show Refresh Button:** ☒
- Set Component Visibility:** ☒
- Filters:** + Add Filter

2) You can add other frequently used items like the Volunteer Opportunity Wizard. (Use the lightning component "Flow" and choose the flow "Volunteer Opportunity Wizard:")

Lightning Components

Search components...

Standard (21)

- App Launcher
- Assistant
- Chatter Feed
- Chatter Publisher
- Dashboard
- Flow
- Items to Approve
- Key Deals
- List View
- Paused Flow Interviews
- Performance
- Quip
- Recent Items

Desktop Shrink To View Refresh Save Activation...

Welcome to HandsOn Connect 3.1 Lightning!
Client Name - Client ID
View Your Public Site
HandsOn Connect Help

of Connections per Volunteer Opportunity
Donut Chart

Create a new Volunteer Opportunity

Volunteer Attendance

Volunteer Opportunity Wizard

Page > Flow

Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.

* Flow

Vounteer Opportunity Wizard

Layout

One Column

Optionally, enter values for these flow variables. Only variables that allow input access are supported.

singleuserecurrence

UserEmailFlow

Add useful 'list views' to the home page:

Examples: Opportunities Awaiting Approval, Occurrences Awaiting Approval, Upcoming Connections, ...

Use Tasks? Add the "Today's Tasks" component!

Key Deals

List View

Paused Flow Interviews

Performance

Quip

Recent Items

Recent Records

Recommendations

Report Chart

Rich Text

Today's Events

Today's Tasks

Trending Topics

Visualforce

Get more on the AppExchange

Volunteer Opportunities

Opportunities Awaiting Approval

Occurrences

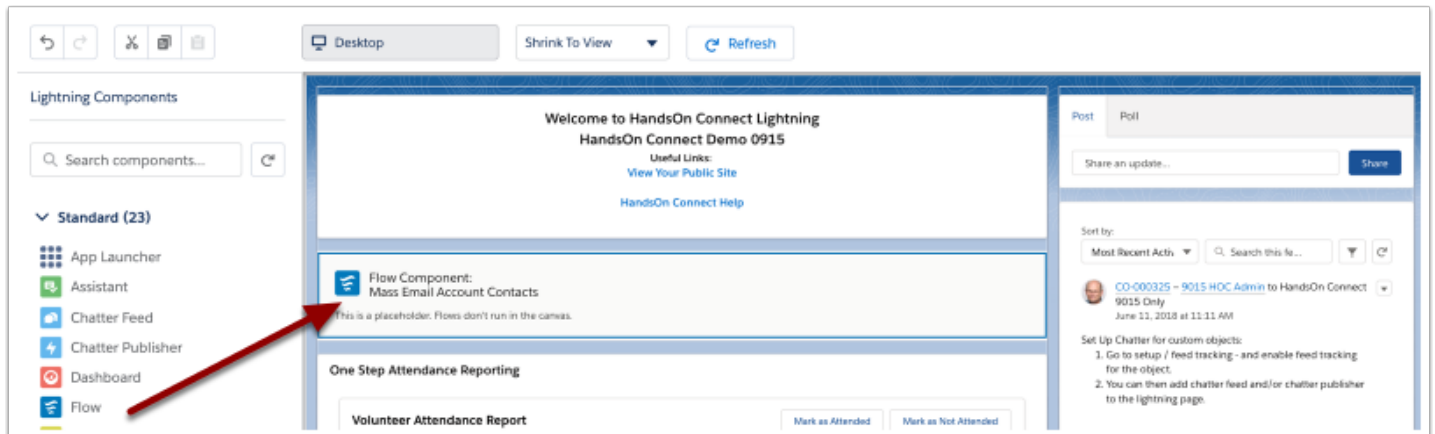
Occurrences Awaiting Approval

Connections

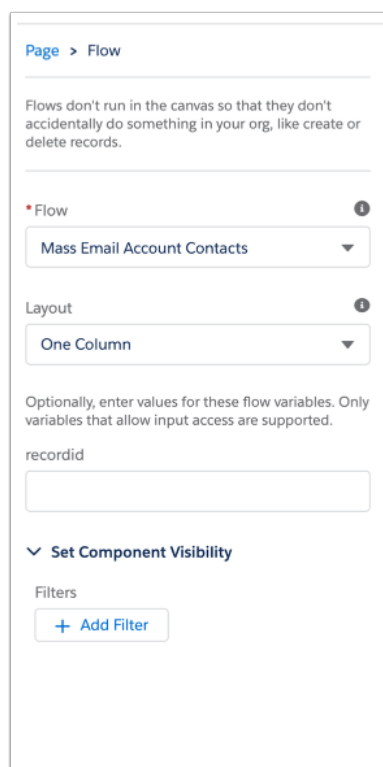
Upcoming Connections

Optional: If you choose to add the Volunteer Opportunity Wizard to the Home Page -- it does take a little bit of configuration. Here's how:

Select the Flow Component from the left lightning components sidebar - and drag it into the lightning page layout:



Click on the flow component, and you'll be able to edit the flow component in the right sidebar:



Select the flow "**Volunteer Opportunity Wizard**". (NOT "Volunteer Opportunity Wizard - Flow" which is an old version some orgs still have)

Set Layout to "One Column"

Scroll to the bottom and In the Flow variables set singleuserecurrence = 0

Leave the rest blank:

Click Save to save the new component.

The wizard will now appear on your home page for easy access. Cool!

SAVE the page layout

The screenshot shows the configuration page for a Lightning Page. At the top, there are 'Save' and 'Activation...' buttons. Below them is a breadcrumb 'Page > Flow'. A warning message states: 'Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.' The configuration section includes a 'Flow' dropdown set to 'Vunteer Opportunity Wizard' and a 'Layout' dropdown set to 'One Column'. Below these, a note says: 'Optionally, enter values for these flow variables. Only variables that allow input access are supported.' There are five input fields for flow variables: 'singleuserecurrence' (with the value '0'), 'UserEmailFlow', 'VAR_Affiliate_Org_ID', 'VAR_Day_of_Month', and 'VAR_LocationCity'.

(Optional) Learn more about customizing Lightning Pages

Lightning makes it easy to customize lightning pages like the Home Page (or Record pages for each of your objects! [When you're ready -- Learn more about customizing lightning pages here.](#)

[Next: Updating Page Layouts](#)

Configuring HandsOn Connect Lightning (Pt 2) Page Layouts

If you wish to continue to use the Page Layouts that you have been using in Classic -- no action is needed on your part. If you've added custom fields, or customized the page layouts to your satisfaction, then you may just want to leave them in place.

However -- we have included new page layouts as part of HOC Lightning - and if you like, you can assign these page layouts to your system admin and staff profiles so they can take advantage of the newer, nicer page layouts (that remove fields no longer used in HOC 3 - relabel sections, etc.).

Best practice would be to use the new 3.1 layouts, use 'save as' to create a new copy, and add your custom fields to the 3.1 layouts. Then you'll have the latest of everything including your personal customizations. Ultimately the choice of what page layouts you want to use are yours!

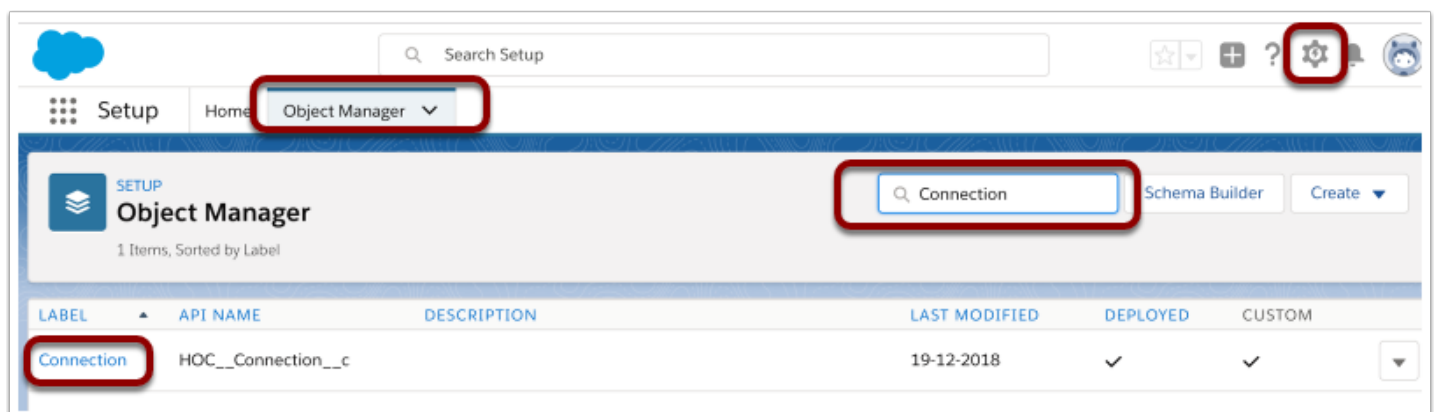
How to assign new page layouts

In Lightning - the easiest way to update objects is to go to Setup (click on the cog and select setup - and then use the Object Manager to get to the object of your choice. Let's select 'Connection' and see how to update the page layouts:

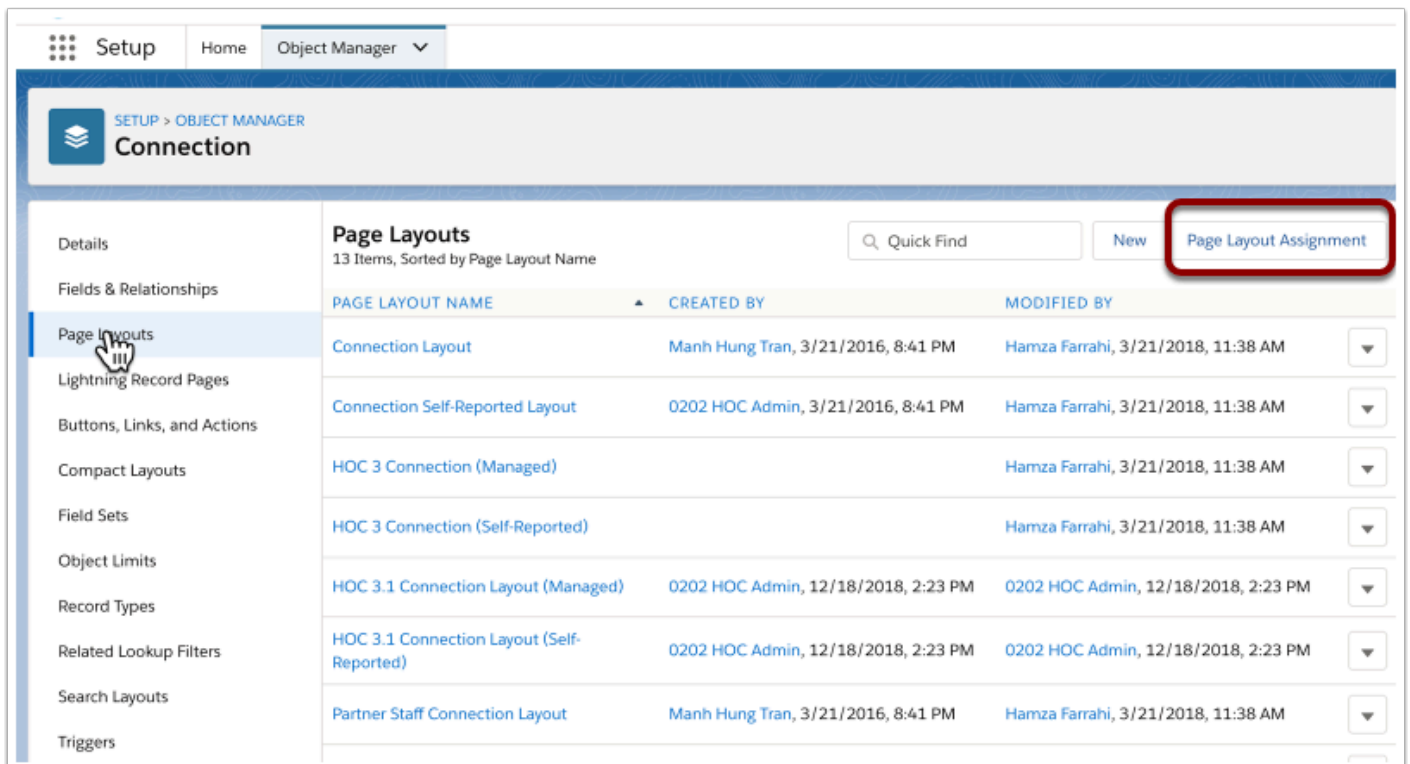
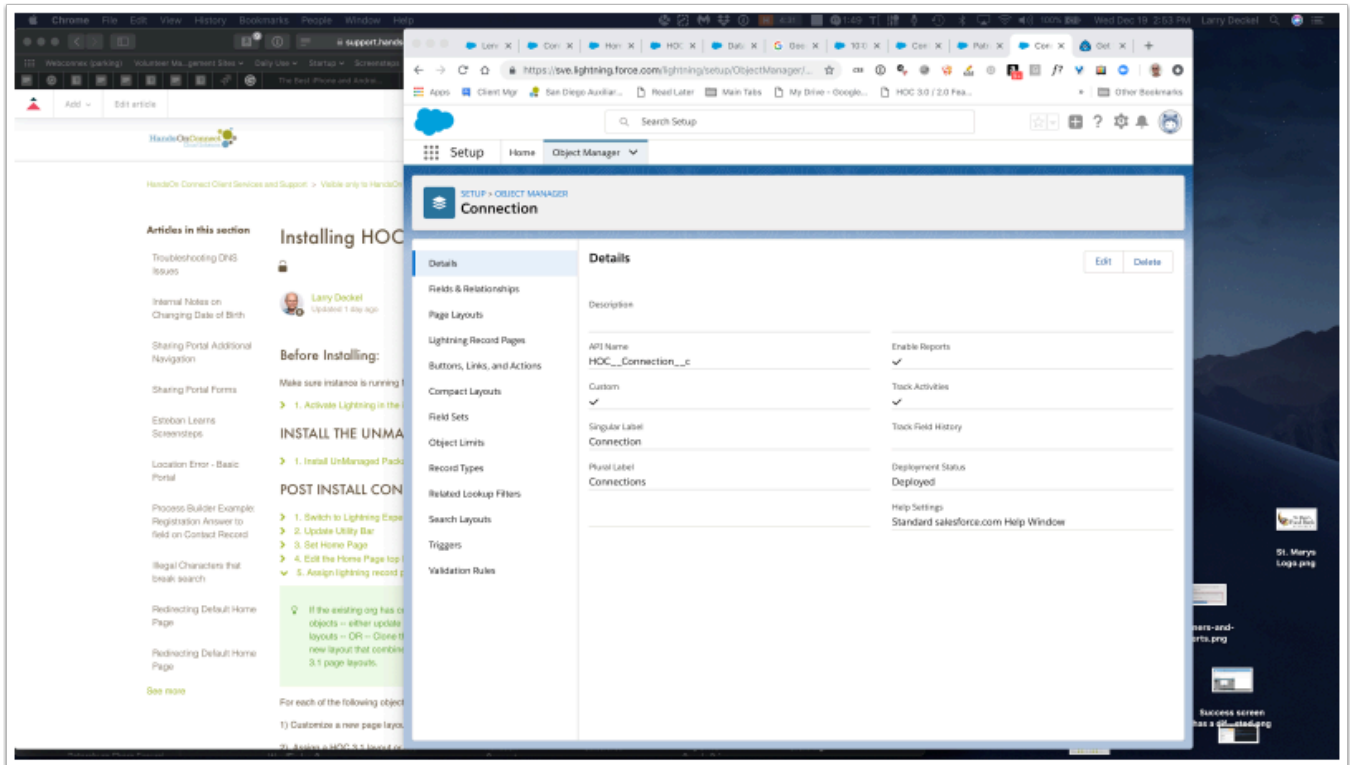
Click on Object Manager Tab. (FYI - the "Home Tab" in setup gets you to all the other setup items.

Either scroll and find the object you want to work with,, or type its name in the quick search box.

When you've found your object, click on it to open the object view:



The object view shows all the elements of an object in the left column. Click on "Page Layouts" to access the page layouts for lightning.



You may find a lot of old page layouts here. You can safely ignore them (or delete them later if you feel like doing some housekeeping).

The New Page Layouts we've made available are labeled "HOC 3.1....."

Connections have two page layouts (one for Managed connections, one for Self-reported connections). To see your current page layout assignments, and make changes, click on the "Page Layout Assignment" button.

You'll then see each profile - and which page layout they are using for the "Managed" record type and which they are using for the "Self-Reported" connection type.

In the example below we see the current assignments for the two profiles HOC uses (system administrator and Staff) are currently using the page layouts. Staff Connection Layout v3 (for Managed connections) and "Connection Self-Reported Layout" for self-reported connections. (Choose additional profiles if you have other profiles using HandsOn Connect and update those profiles too!)

Click on Edit Assignment:

Profiles	Record Types		
	Master	Managed	Self-Reported
Chatter Free User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Chatter Moderator User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Content Only User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Contract Manager	Connection Layout	Connection Layout	Connection Self-Reported Layout
Customer Portal Manager	Connection Layout	Connection Layout	Connection Self-Reported Layout
Customer Portal Manager Custom	Connection Layout	Connection Layout	Connection Self-Reported Layout
Customer Portal User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Employee Coordinator	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3	Connection Self-Reported Layout
Force.com - One App User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Gold Partner User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Marketing User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Overage Authenticated Website User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Overage Customer Portal Manager Custom	Connection Layout	Connection Layout	Connection Self-Reported Layout
Partner Staff	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3
Partner Staff Named User	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3
Partner Staff v2	Connection Layout	Connection Layout	Connection Self-Reported Layout
Read Only	Connection Layout	Connection Layout	Connection Self-Reported Layout
Solution Manager	Connection Layout	Connection Layout	Connection Self-Reported Layout
Staff	Staff Connection Layout v3	Staff Connection Layout v3	Connection Self-Reported Layout
Standard Platform User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Standard User	Connection Layout	Connection Layout	Connection Self-Reported Layout
System Administrator	Staff Connection Layout v3	Staff Connection Layout v3	Connection Self-Reported Layout
Volunteer	Connection Layout	Connection Layout	Connection Self-Reported Layout
Volunteer Leader	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3
Volunteer Leader Named User	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3
Volunteer Leader v2	Connection Layout	Connection Layout	Connection Self-Reported Layout

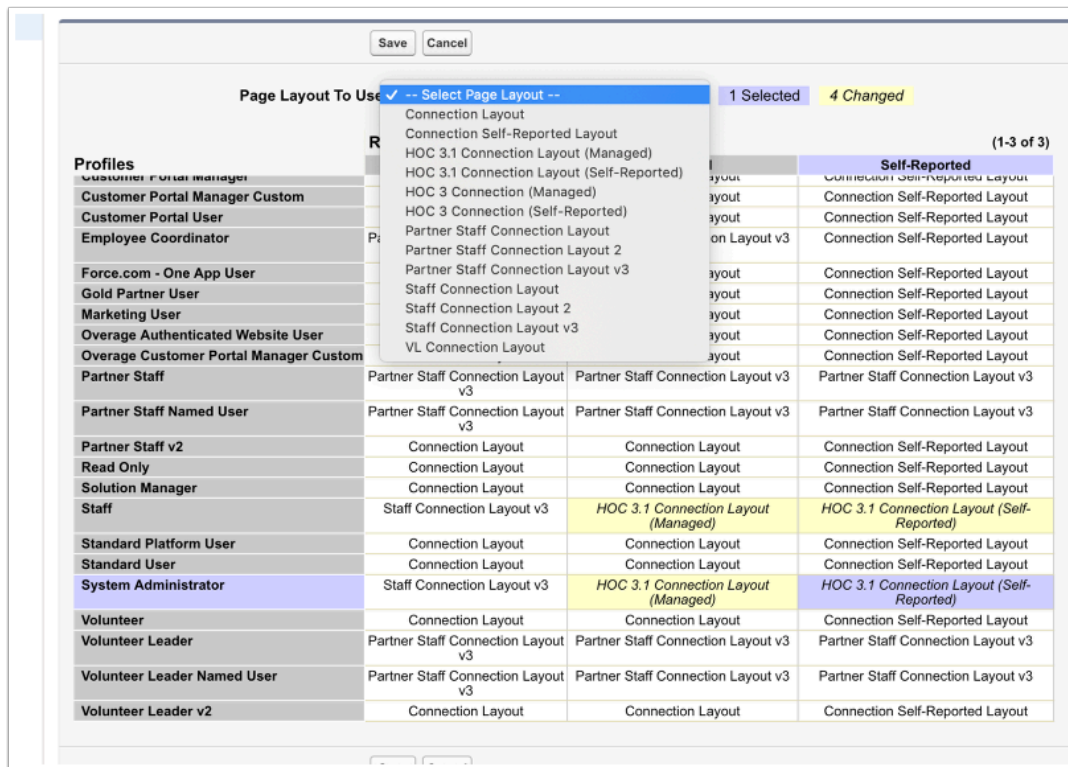
To update the page layout - click on the profile and page layout and then use the picklist to replace it with the new page layout.

For connections the new layouts are:

HOC3.1 Connections (Managed). (for the managed record type)

HOC3.1 Connections (Self Reported) - for the self-reported record type.

Update the page layouts for both record types, and both profiles, and then click Save. (Your changes will appear in yellow before you save.)



! Keep in mind - you do not have to change your page layouts assignments if you like the way they looked in the past or have done a lot of customization to your page layouts.

OR - you can compare the new layouts to your older, customized layouts, and update either to create the page layout that works best for your organization.

For users who have not customized their page layouts at all, we do recommend that you switch to the new page layouts (they are nicer and have improved related lists, etc.). ALSO -- on older page layouts you may find yourself missing certain quick actions in Lightning.

💡 If you do not have HOC 3.1 page layouts in your instance, then use the HOC 3 page layouts.

Also - you may see two each of a number of the HOC3 Page Layouts. One of these is part of the managed package (and can't be edited), and one of these is unmanaged (and can be edited). The managed ones say 'created by HOC Admin'. Use the ones without a created by, as these are more flexible. And feel free to rename them so you know its YOUR version of this page layout :-)

But if the 3.1 layouts are available - use them!

Page Layouts				View	Page Layout Assignment
15 Items, Sorted by Page Layout Name					
PAGE LAYOUT NAME	CREATED BY				
Connection Layout	Ruchie Singh, 3/29/2017, 7:42 AM				
Connection Self-Reported Layout	0219 HOC HAdmin, 3/29/2017, 7:42 AM				
HOC 3 Connection (Managed)	0219 HOC HAdmin, 3/29/2017, 7:42 AM	0219 HOC HAdmin, 3/29/2017, 7:42 AM			
HOC 3 Connection (Managed)					
HOC 3 Connection (Self-Reported)	0219 HOC HAdmin, 3/29/2017, 7:42 AM	0219 HOC HAdmin, 3/29/2017, 7:42 AM			
HOC 3 Connection (Self-Reported)					
HOC 3.1 Connection Layout (Managed)					
HOC 3.1 Connection Layout (Self-Reported)					
Partner Staff Connection Layout	Ruchie Singh, 3/29/2017, 7:42 AM	0219 HOC HAdmin, 3/29/2017, 7:42 AM			
Partner Staff Connection Layout 2	0219 HOC HAdmin, 3/29/2017, 7:42 AM	0219 HOC HAdmin, 3/29/2017, 7:42 AM			

This one is part of the HOC package and can not be customized.

This one is not part of the package and can be customized. So use this one :-)

If you decide to use the updating 3.1 page layouts (recommended) - use the object manager and update page layout assignments for each of the following objects:

- **Connections.** (managed and self-reported record types)
- **Recurrence**
- **Volunteer Event**
- **Volunteer Team**
- **Volunteer Team Member.**
- **Volunteer Opportunities** and **Occurrences** each have two choices of page layout -- (regular) and advanced. Use the advanced layout if you want to have ALL the advanced features available in your page layouts. Use the other 3.1 layout if you are not using any advanced features. (Tip: if you only want SOME of the advanced features choose the advanced layout - do a save as to create your own version - and remove the fields for features you are not using!)
- **Organization** (Account). (Update both the nonprofit and business record types. Don't update for household, Individual or other record types)
- **Contact.** (set for volunteer record type - choose between a standard layout or the advanced one -- if you're using NPSP then choose HOC 3 Contact - NPSP if its available)

Here's a quick video showing how quickly you can change the page layout for each object listed above:

<https://screencast.com/t/1gC1JhiSHm>

Need Help?

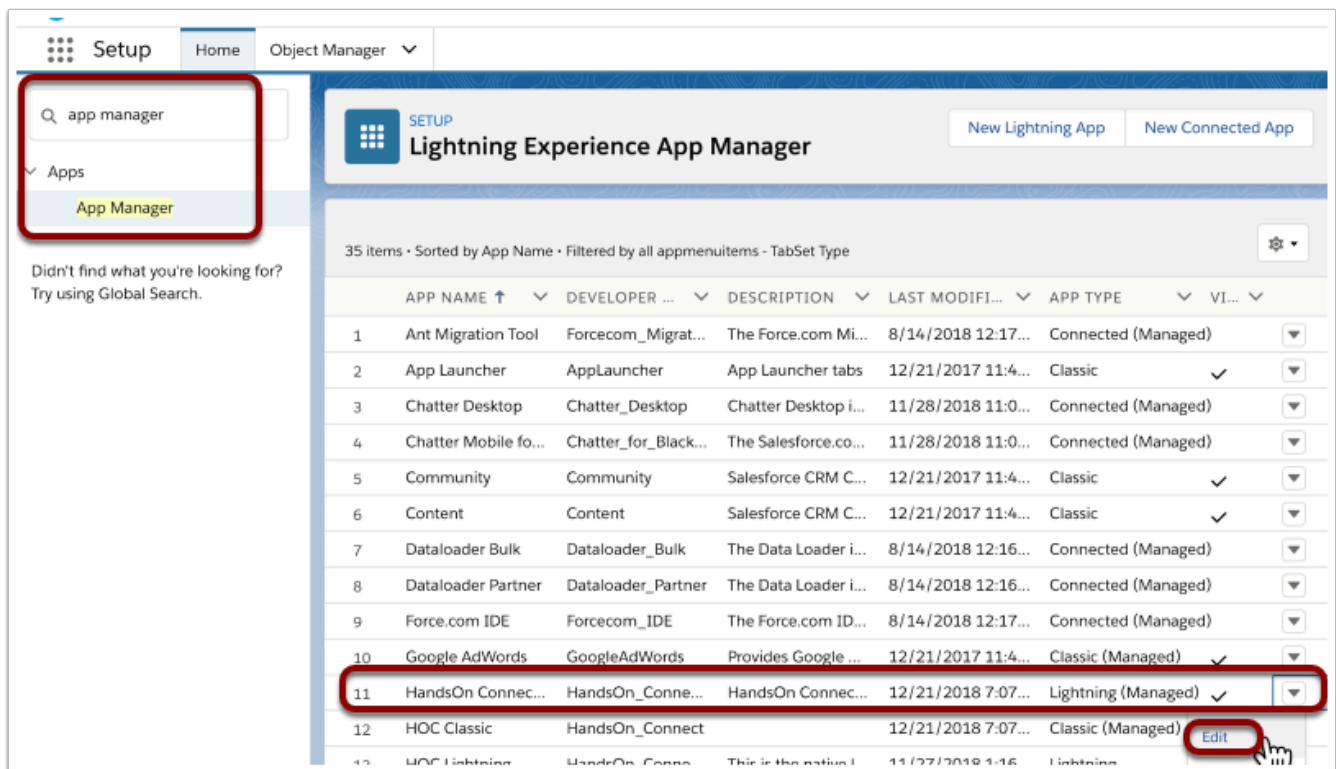
Come to one of our [daily scheduled labs](#) and we can help you configure and set up lightning

(Optional) Making changes to navigation

Because Navigation within the HandsOn Connect application is a matter of personal preference, the default navigation in HandsOn Connect Lightning has only the main objects. But you can customize the navigation for your users. (and users can customize their own navigation)

(Option 1) Add Tabs for all users via the App manager

Go to Setup / App Manager and select the edit option for the HandsOn Connect Lightning application

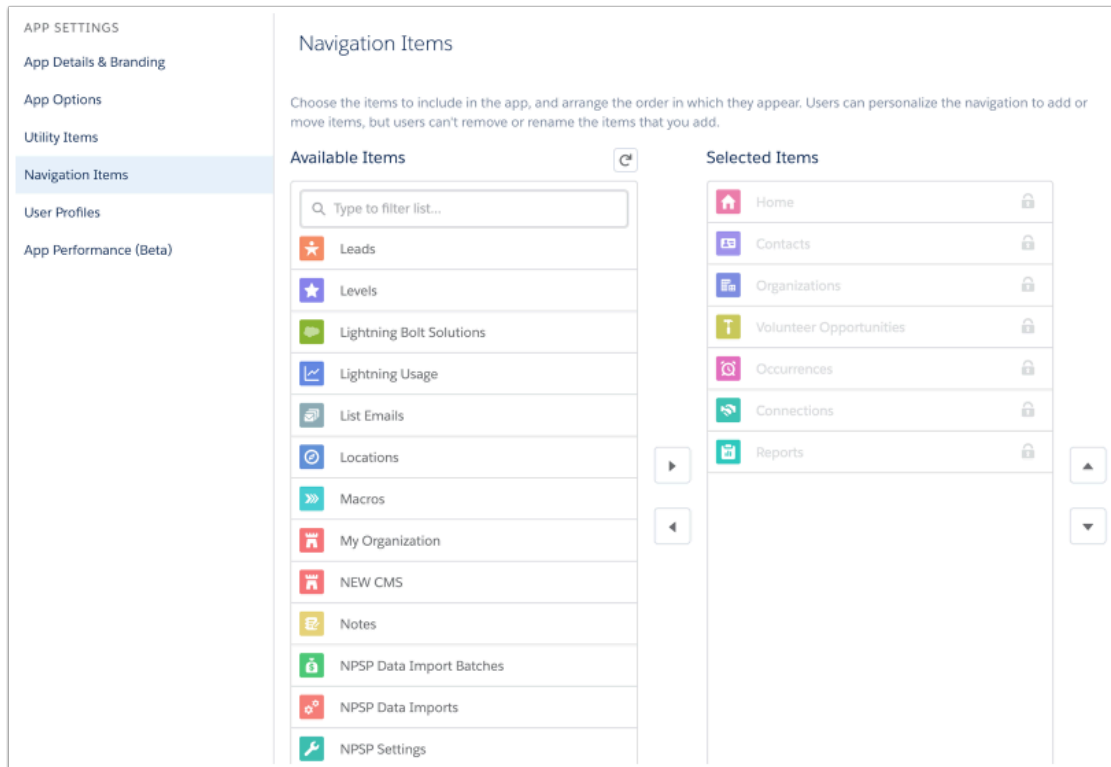


Select "Navigation Items" where you'll see the default Tabs that are available for all users:

- Home
- Contacts
- Organizations
- Volunteer Opportunities
- Occurrences
- Connections
- Reports

These items can't be removed, changed or reordered, but you can add additional navigation tabs that will appear for ALL users, by selecting them from Available Items and adding them to the Selected Items. (For example, you can add "Chatter" or "Volunteer Teams" and "Volunteer Team Members" if you want to make it easy for all your users to access those items.

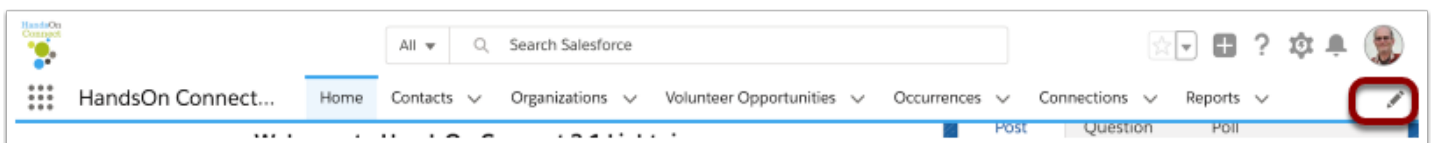
Note: Items added it this way will not be removable by users, they are now part of the app for anyone using it.



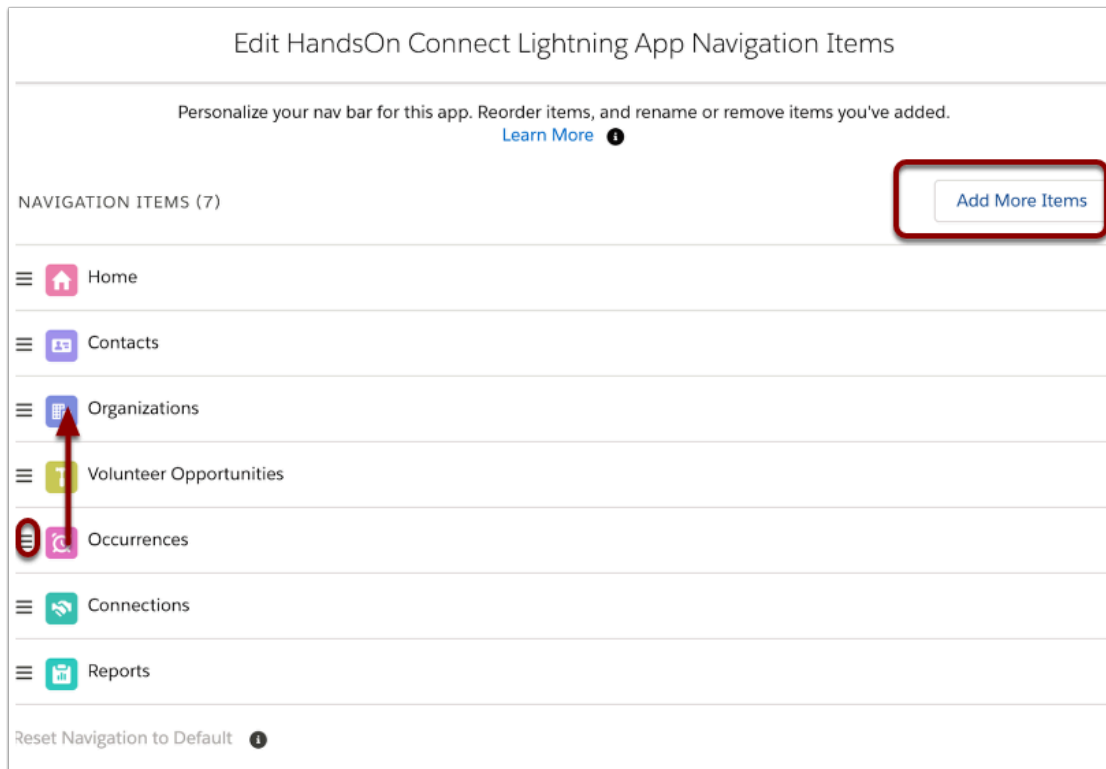
(Option 2) Advise your users to add their own navigation items based on how they use HandsOn Connect.

Lightning makes it easy for individual users to customize the navigation to meet their own style and use case.

To edit the navigation 'tabs' click on the Pencil icon on the right of the navigation.



From this interface you can reorder navigation items (by dragging the 3 lines to the left of the navigation item), and Add Additional Navigation items by clicking on "Add More Items"



💡 There's lots more you can do with Navigation in Lightning:

- Create 'temporary' tabs
- Create tabs for list views or individual records.
- Turn temporary tabs into permanent ones
- Rename Tabs

[For information on working with Lightning Navigation, see this Salesforce Help Article.](#)