Advanced System Administrator Guide

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Troubleshooting HandsOn Connect

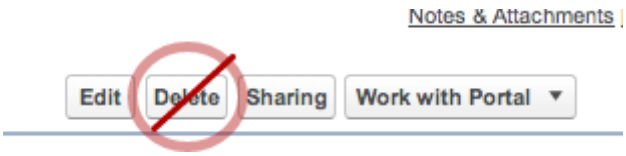
Troubleshooting HandsOn Connect - (The 7 commandments of HandsOn Connect)

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 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,

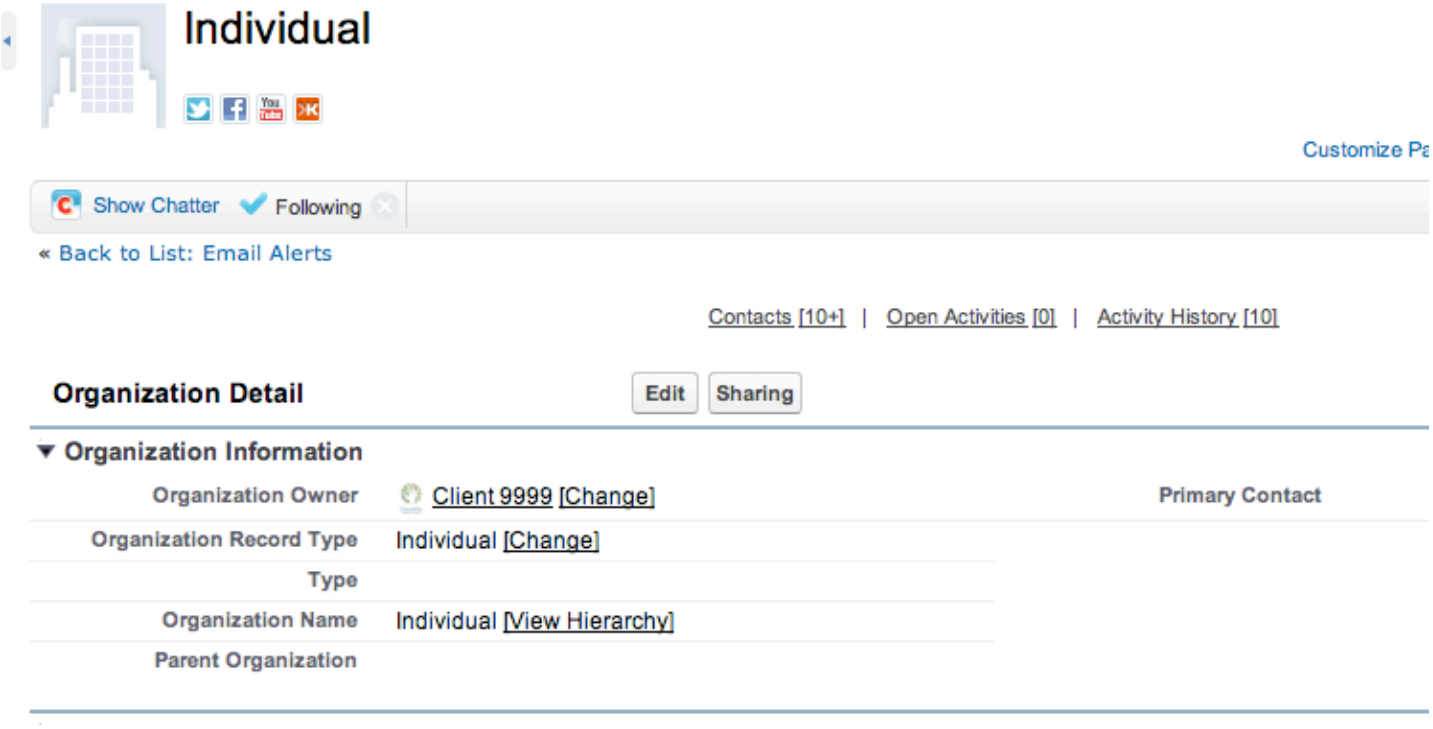
Best Practices when deleting data:

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.

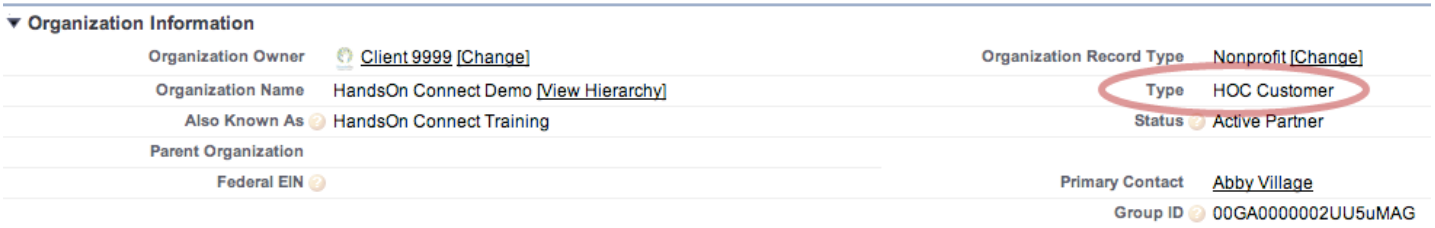
2. Do not delete, edit or rename the organization named "Individual" in the system



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 unable 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 :-)

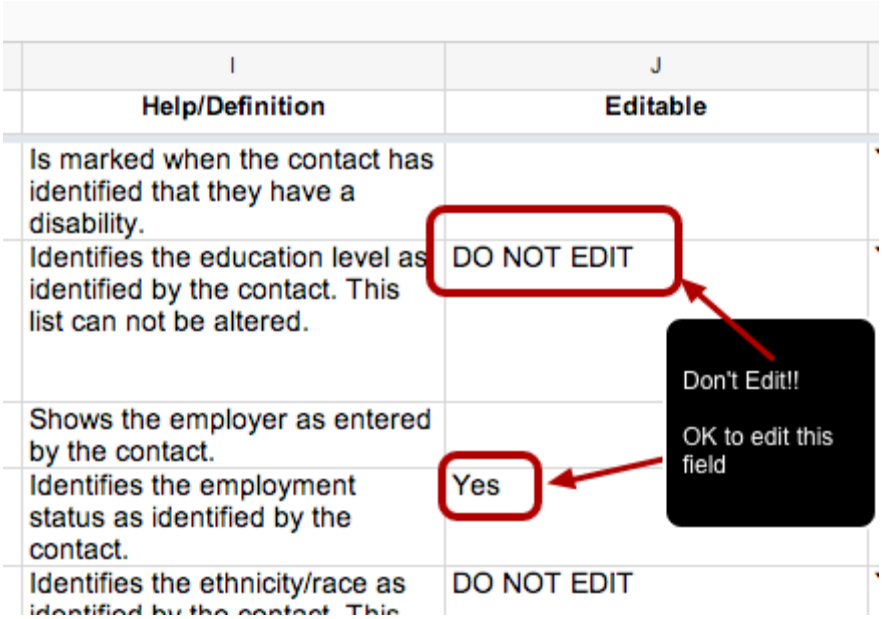
3. YOUR organization record must remain designated as type HOC Customer



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.



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.

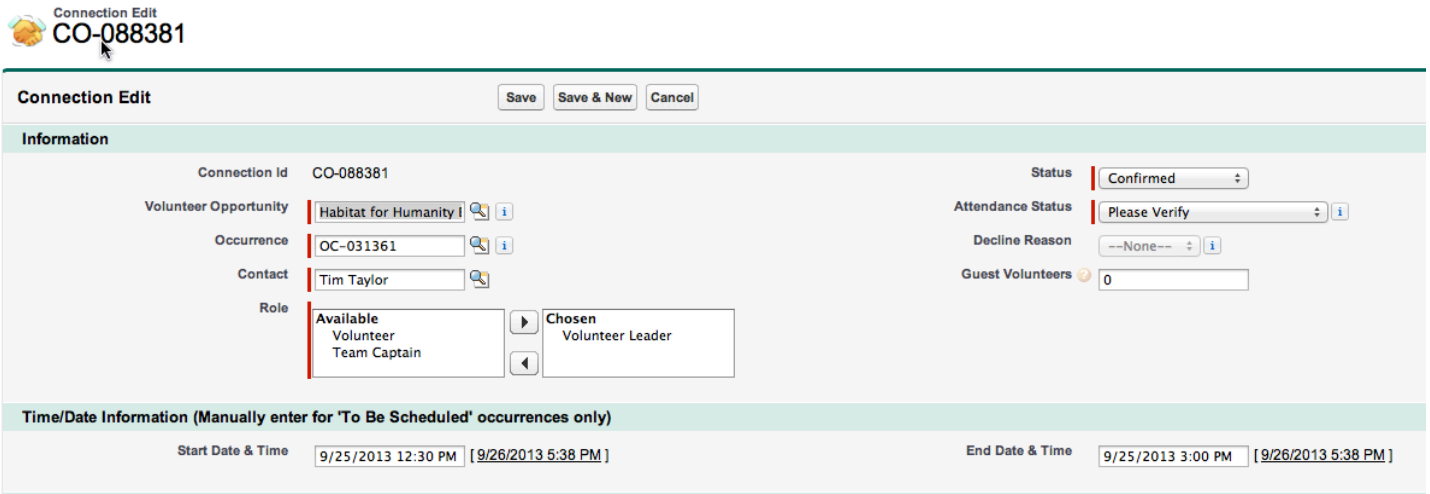
If the field is marked DO NOT EDIT -- then create a new field allowing you to track values you need for local reporting and tracking.

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



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.

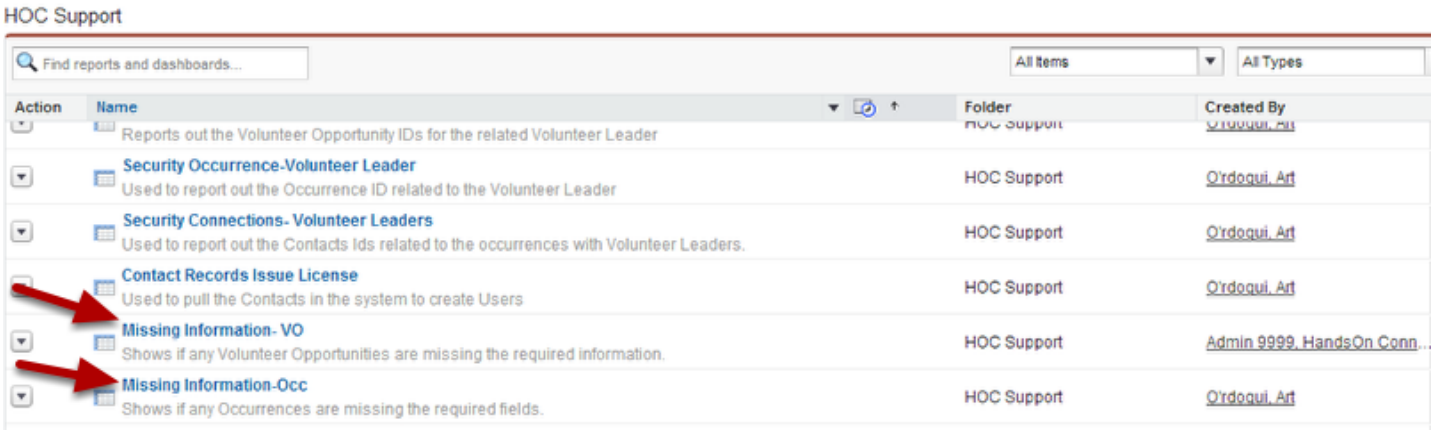
As we learn of problems folks have had -- we'll note them here to save you from making similar data errors:

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 certains 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



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

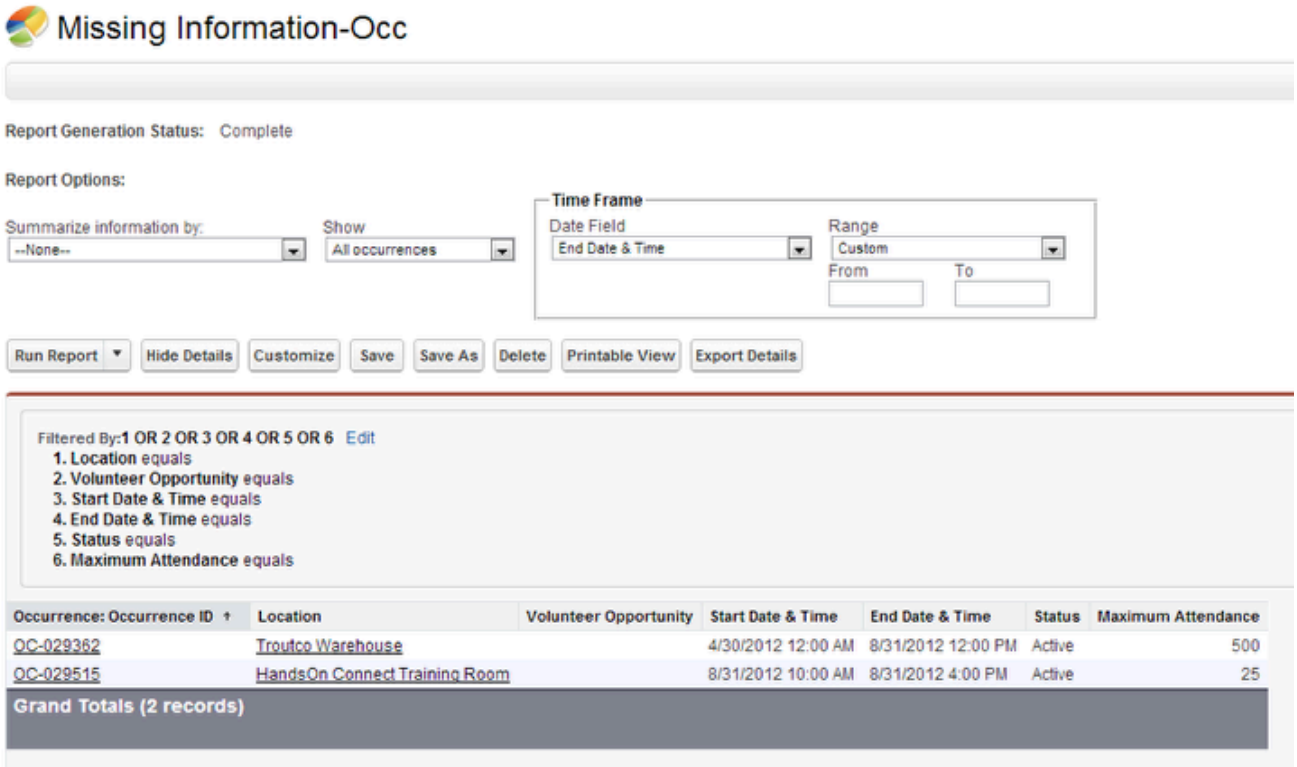
Filtered By:1 or 2 or 3 or 4 or 5 or 6 or 7 or 8 or 9 or 10 OR 11 OR 12 OR 13 Edit
1. Volunteer Opportunity: Volunteer Opportunity Name equals
2. Status equals
3. Type equals
4. Schedule Type equals
5. Start Date equals
6. End Date equals
7. Managed By equals
8. Managing Organization equals
9. Organization 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



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 occurences 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 their 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.

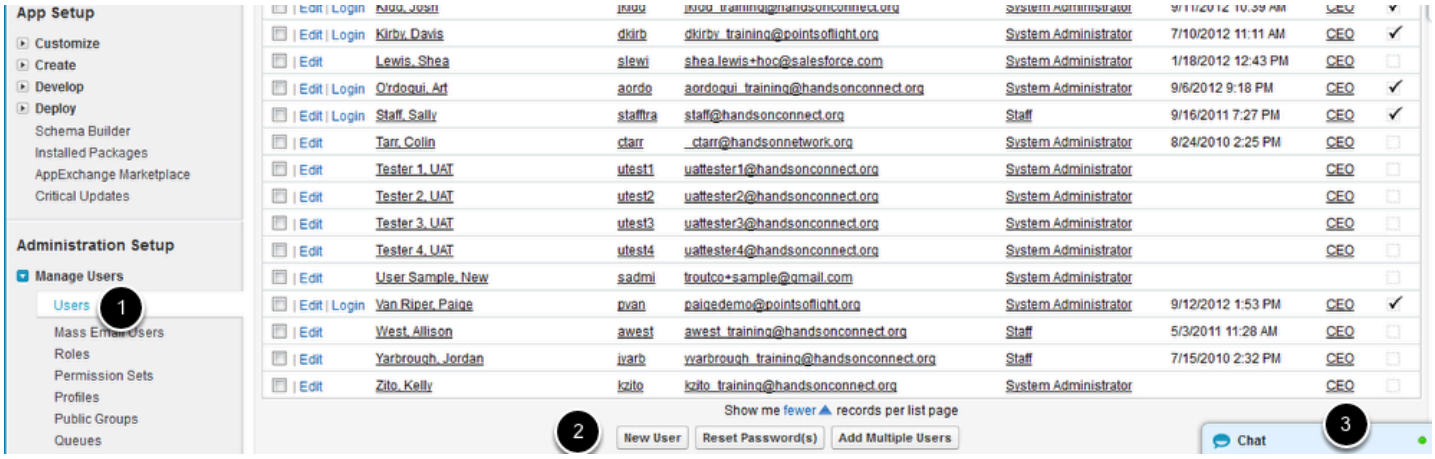
How to Change Your System Administrator

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.

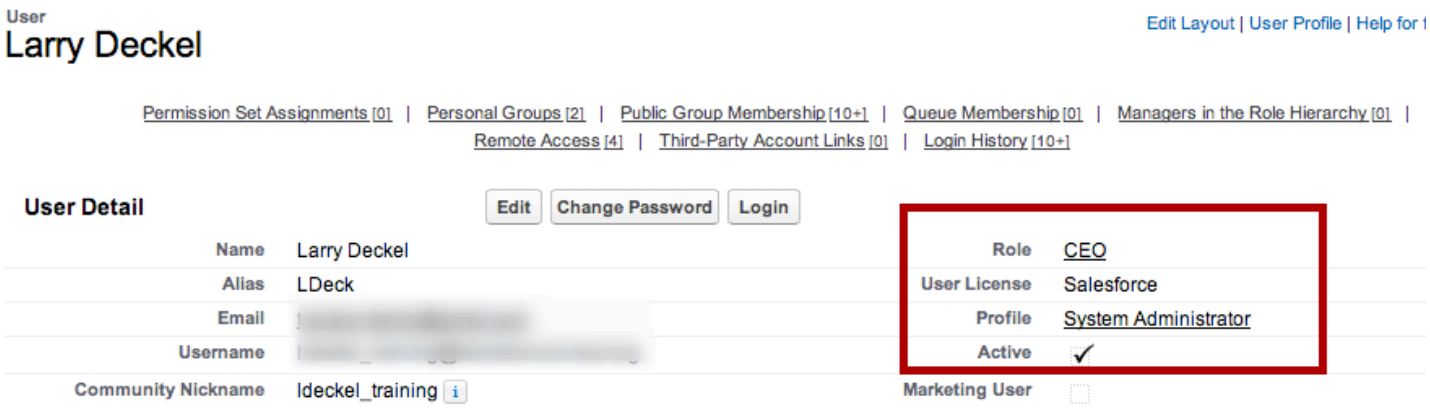
Also the new System Administrator should create an account for themselves in ZenDesk.

User Changes



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.



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"

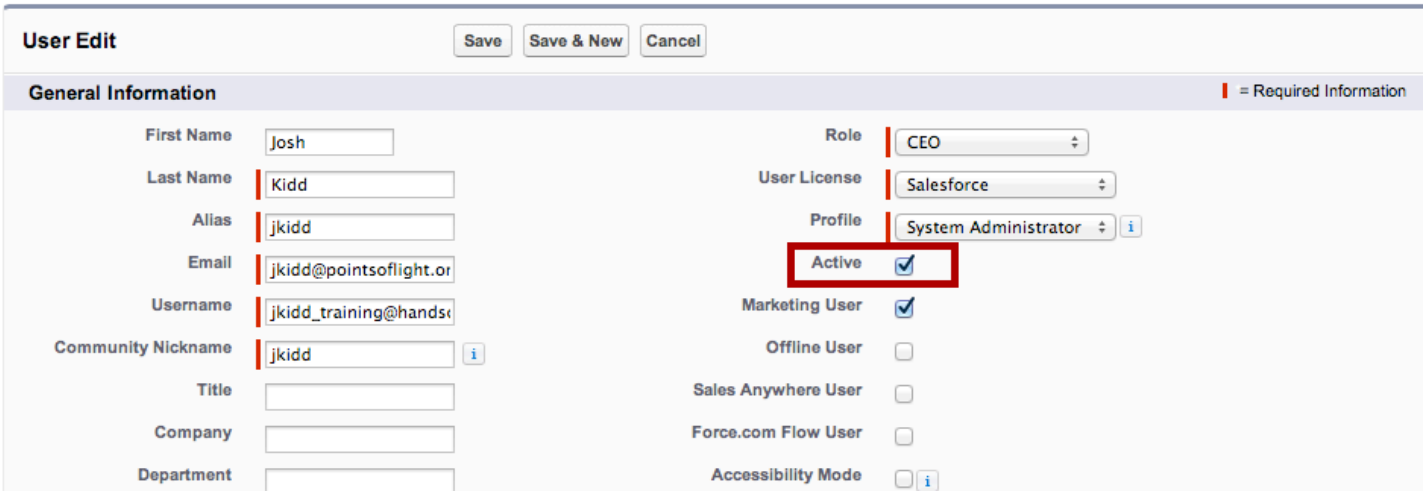
Be sure to save the record and check the box "Generate New Password and notify user immediately".

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



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

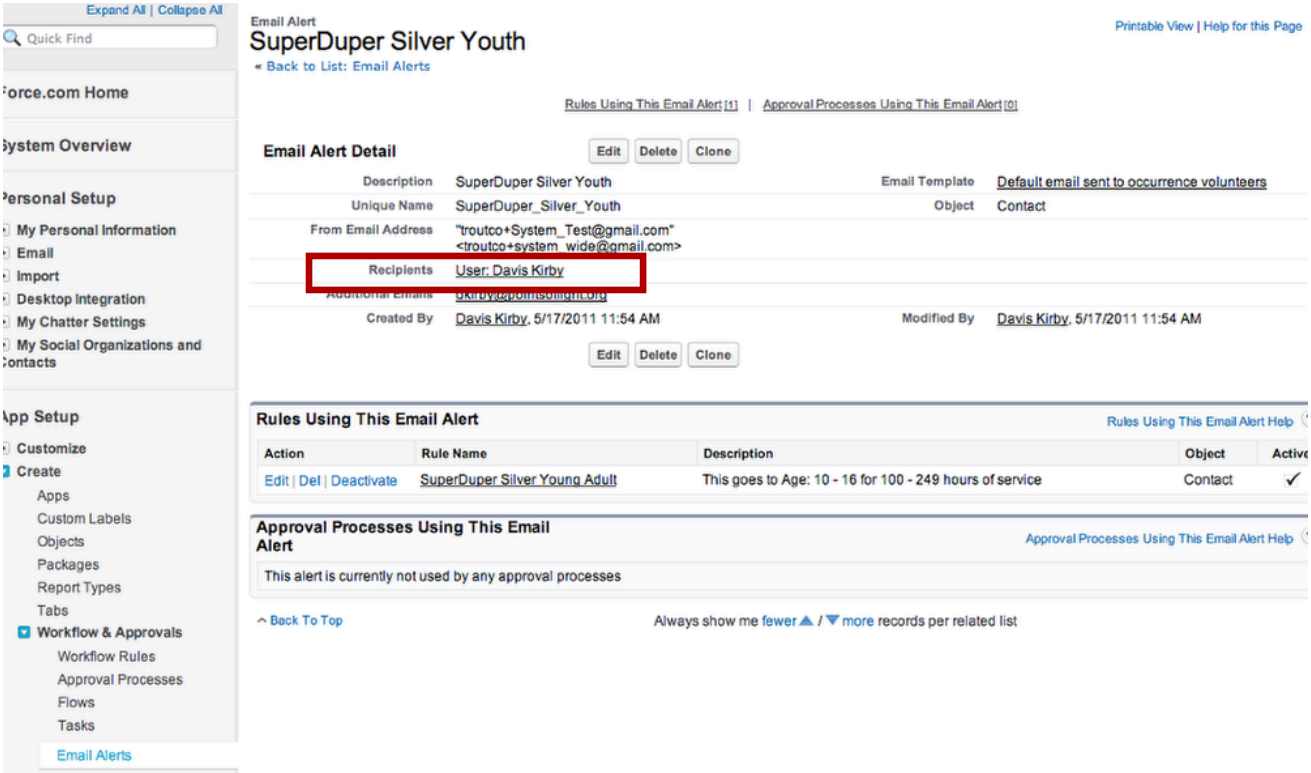
Your changes could not be completed for the following reasons:

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



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.

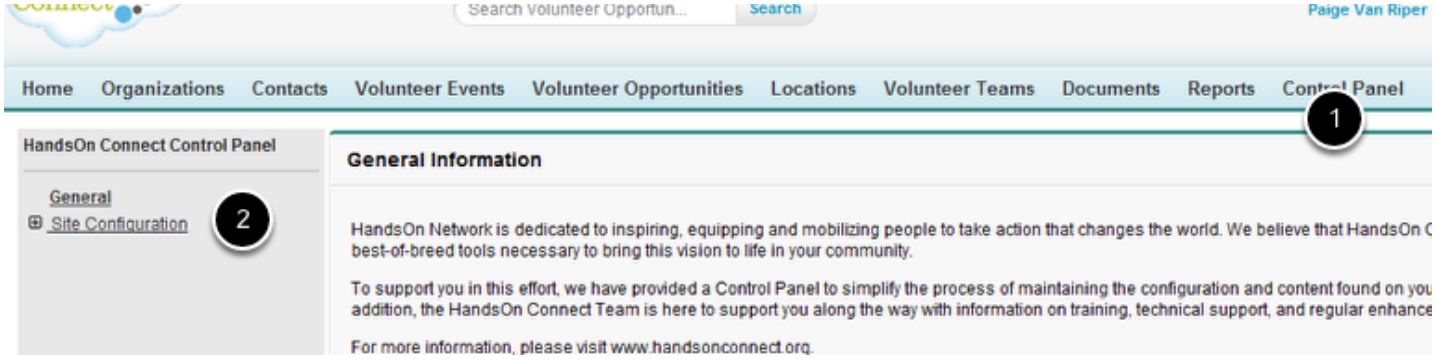
Note: Be sure that at least one person on your staff is given the profile of system administrator before you deactivate the original system administrator.

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

How to Change Your Partner Approval Manager

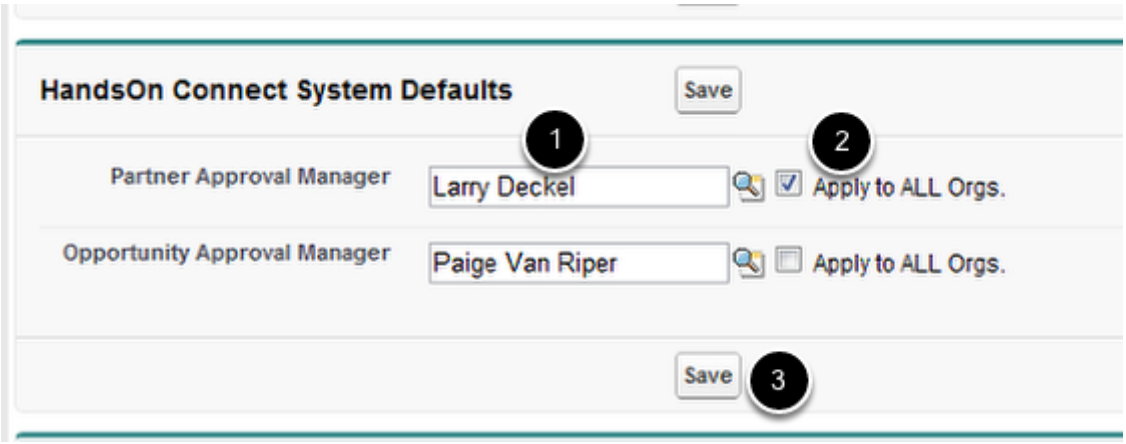
If you have recently made or are about to make staffing changes to your Partner Approval Manager, please follow these steps to transition HandsOn Connect to the new approval manager. These steps will ensure that your new Partner Approval Manager gets all the notifications they should of new partners 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.

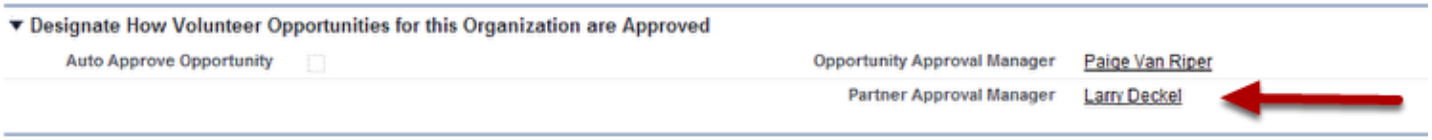
Change Partner Approval Manager



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

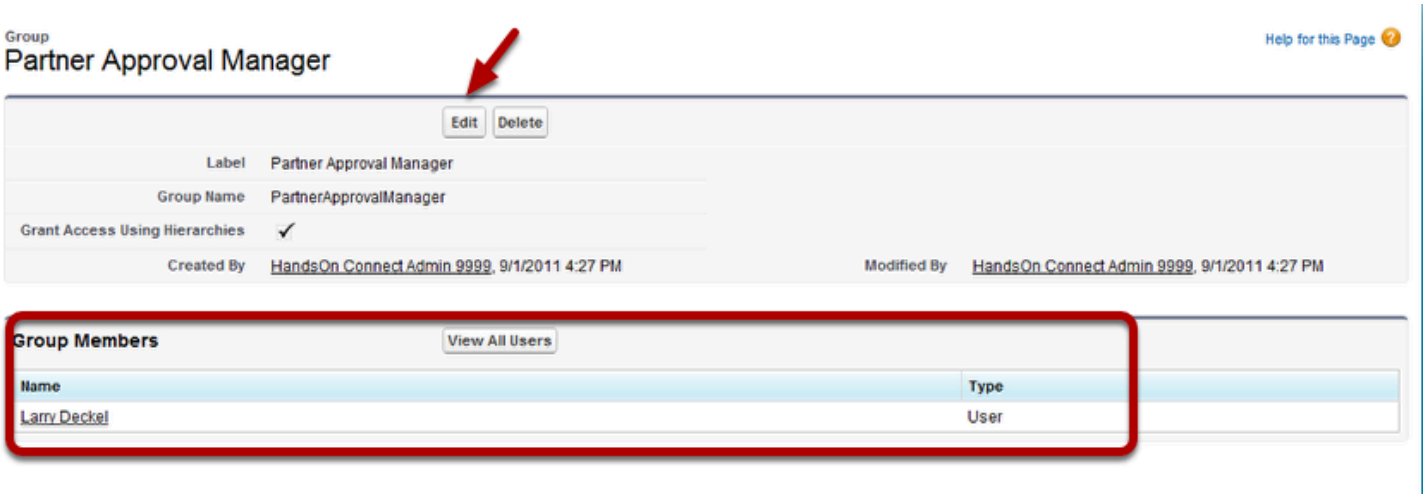


You should spot check several organization records to make sure the change was successfully made. Sometimes there is bad data in the system that may prevent the change from being applied globally. If that is a case open a help desk ticket in ZenDesk so we can help you diagnose the issue. You could also 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

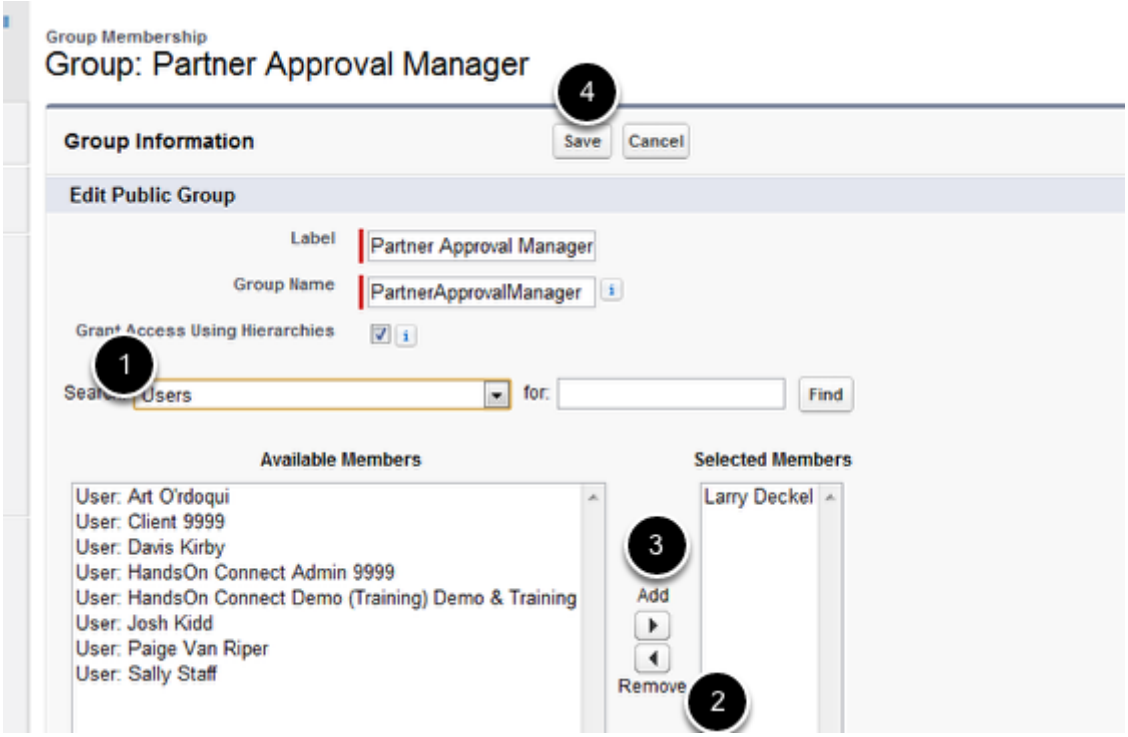
Next you should go to Setup/Administration Setup/Manage Users and click on Public Groups. Find the public group named Partner Approval Manager and click on the name.

Users



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

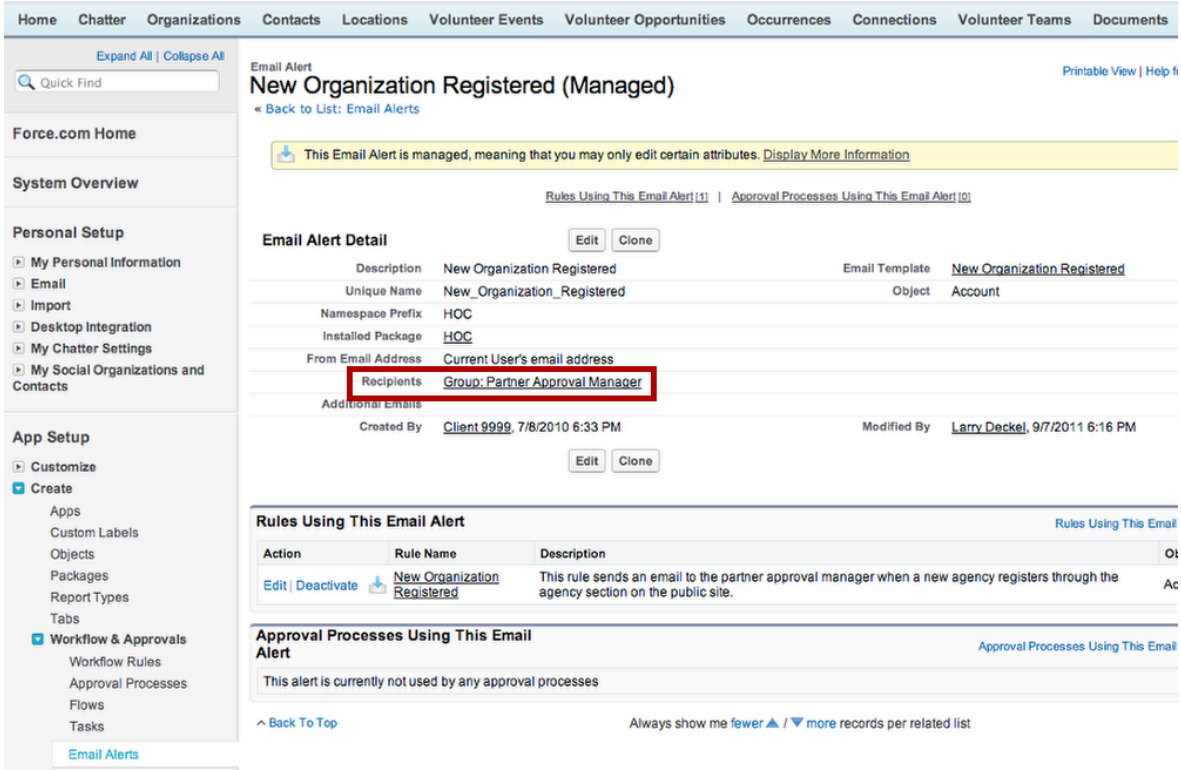
Add New Partner Approval Manager to Group



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.

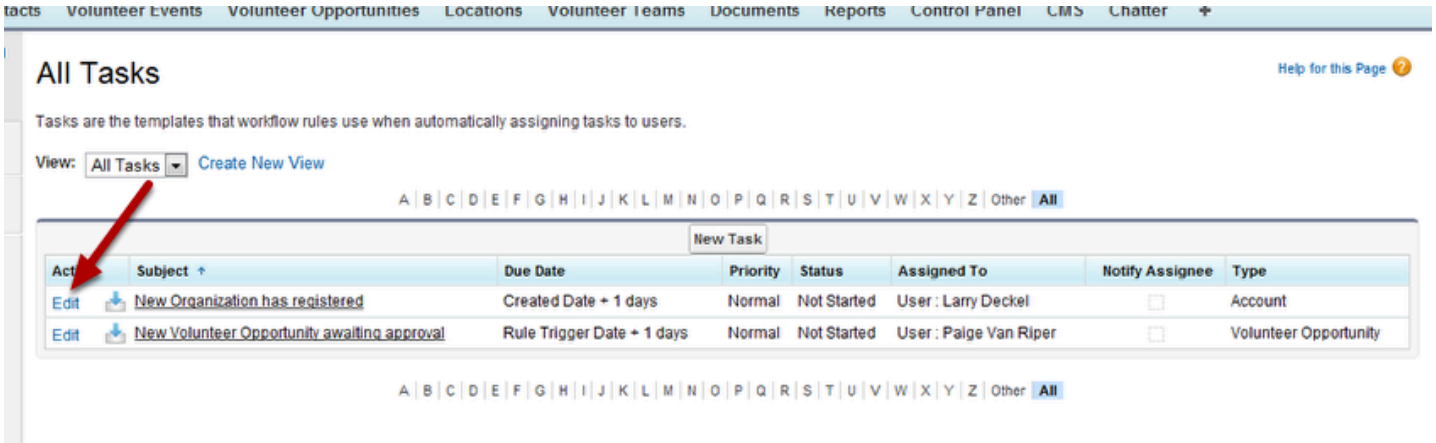
If you want more than one person on your staff to receive email notification when a new partner applies, you can add additional users to this group.

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



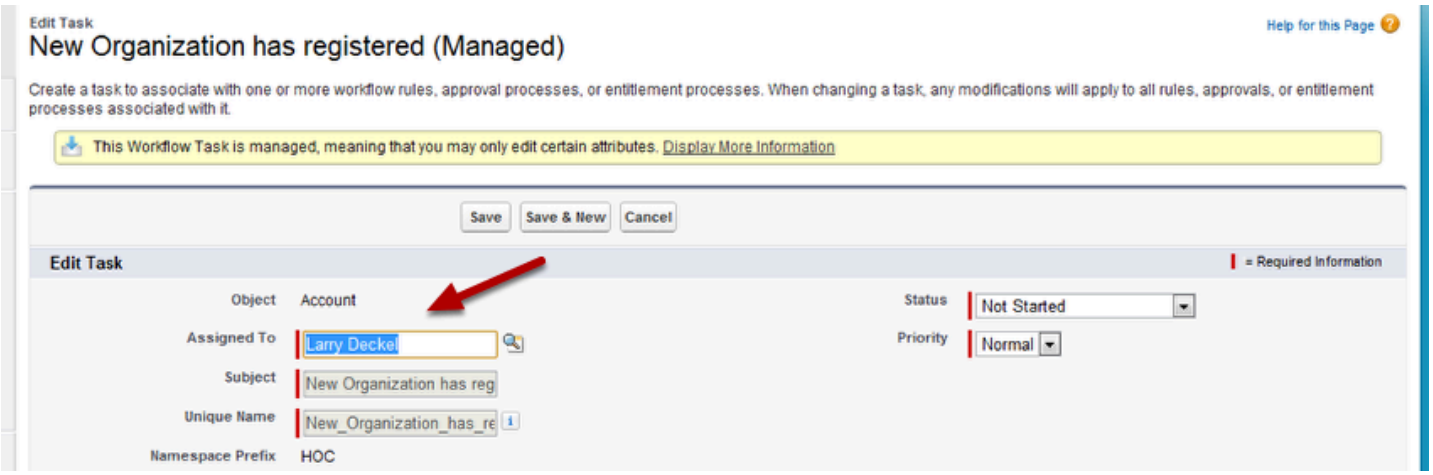
In some older instances of HOC this might have been set to an individual user. Update it if necessary to use the Group.

Edit Approval Task User



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.

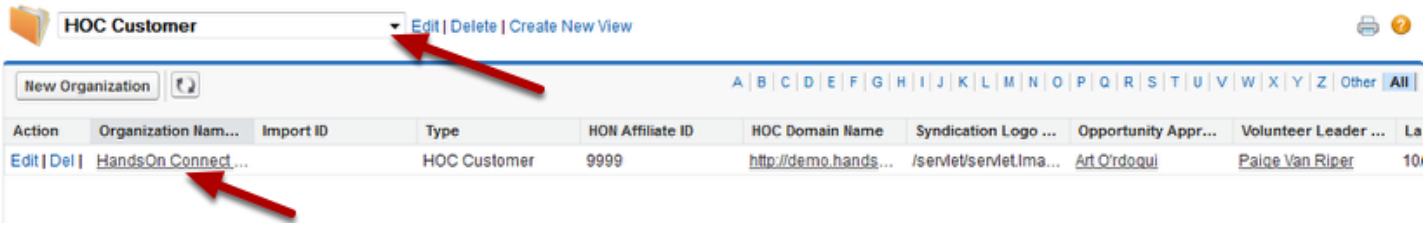
Change Assigned User



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.

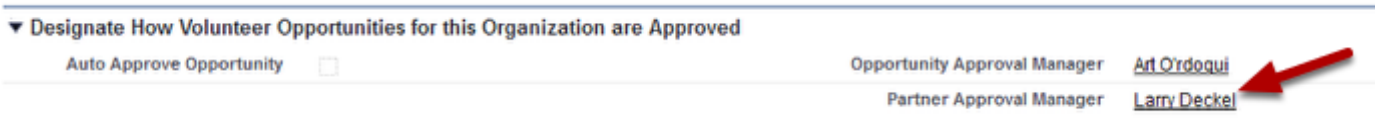
The new Partner Approval Manager will now receive all email alerts and tasks when a new partner organization registers and when an existing organization edits its organization record.

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



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

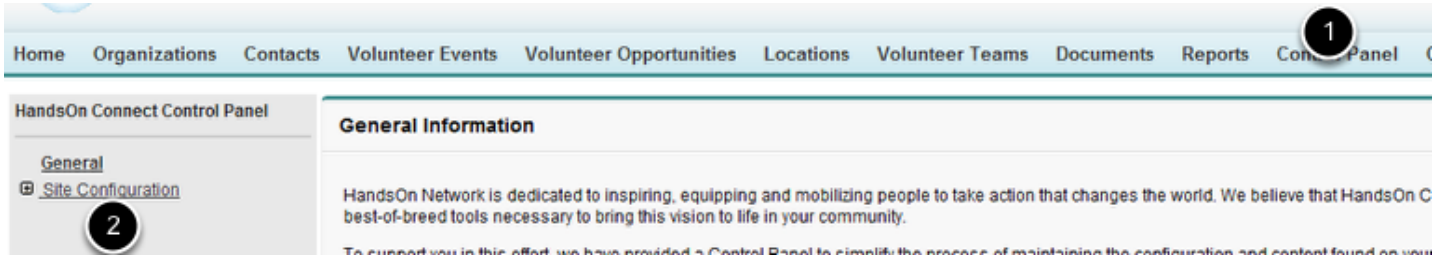


Once you're in your HOC Customer record for your organization scroll down to the Designate How Volunteer Opportunities are Approved section and make sure the new Partner Approval Manager is correct in the HOC Customer Record. If not, select the new partner approval manager in the lookup field. Your new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

How to Change Your Opportunity Approval Manager

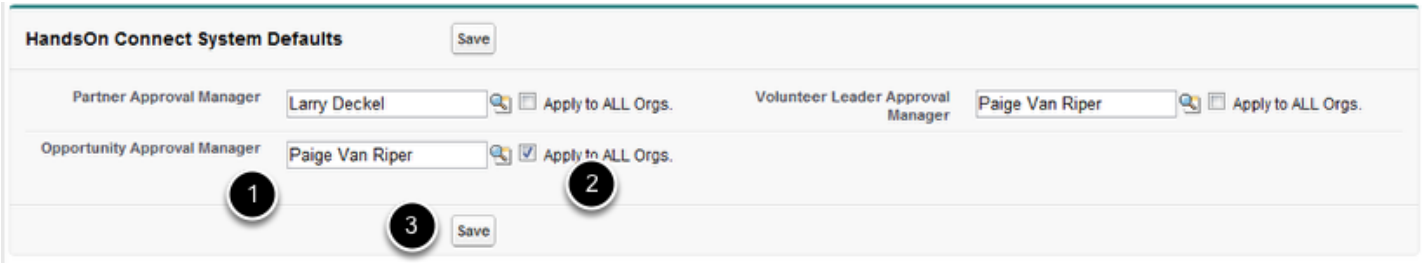
If you have recently made or are about to make staffing changes to your Opportunity Approval Manager, please follow these steps to transition HandsOn Connect to the new approval manager. These steps will ensure that your new Opportunity Approval Manager gets all the notifications they should of new opportunities 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



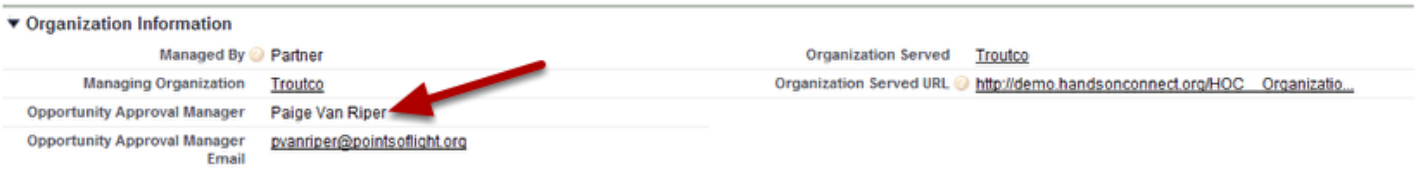
If your organization uses the same Opportunity Approval Manager for all opportunities you will want to globally change the manager. 1) Perform a lookup to the new Opportunity Approval Manager, 2) check Apply to ALL Orgs. and 3) click Save. **Please note once the changes are saved the check in the Apply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

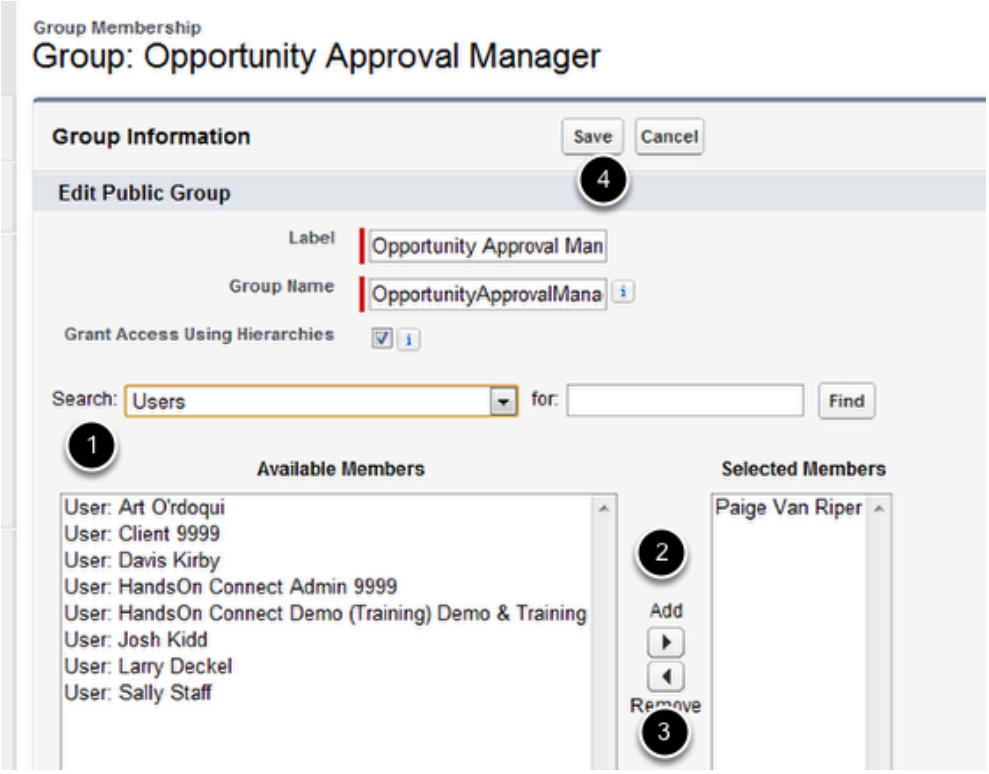


Go check some Volunteer Opportunity records or create a list view of volunteer opportunities including the Opportunity Approval Manager field to make sure they were globally updated. Sometimes if there is bad data in your system, the batch update will not work properly. If you find not all Opportunity 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

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.

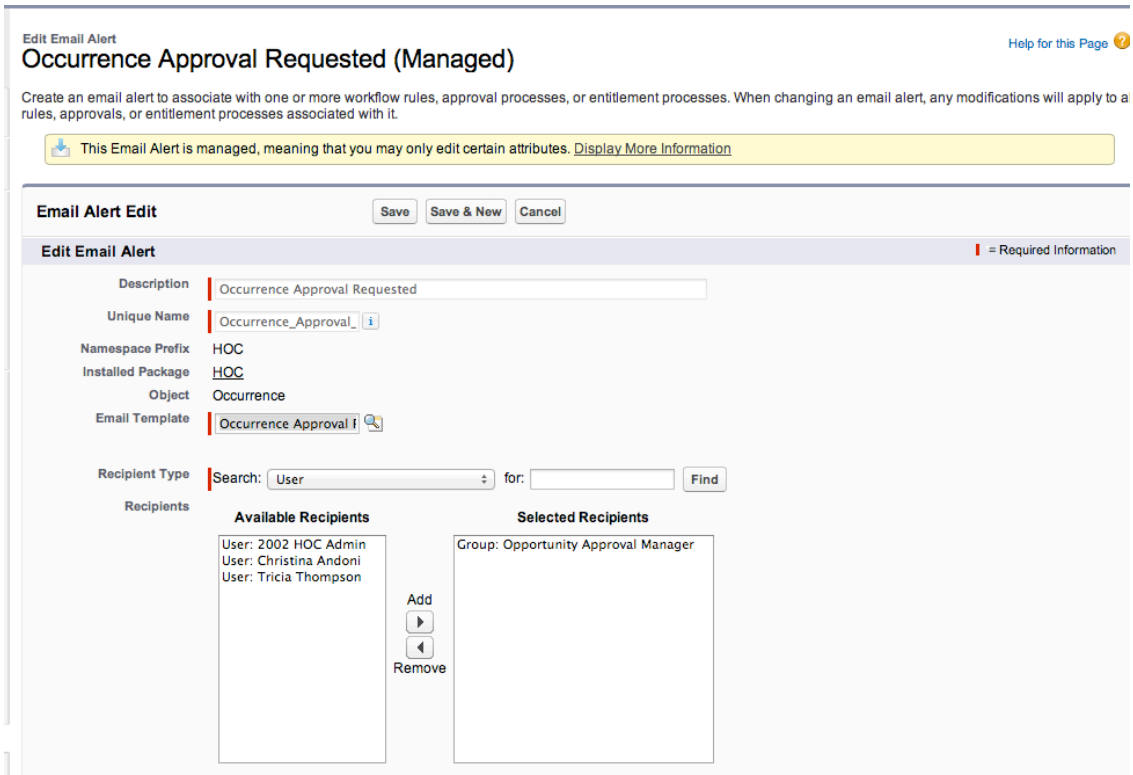
Change Group Members



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"



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:

\L 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.)

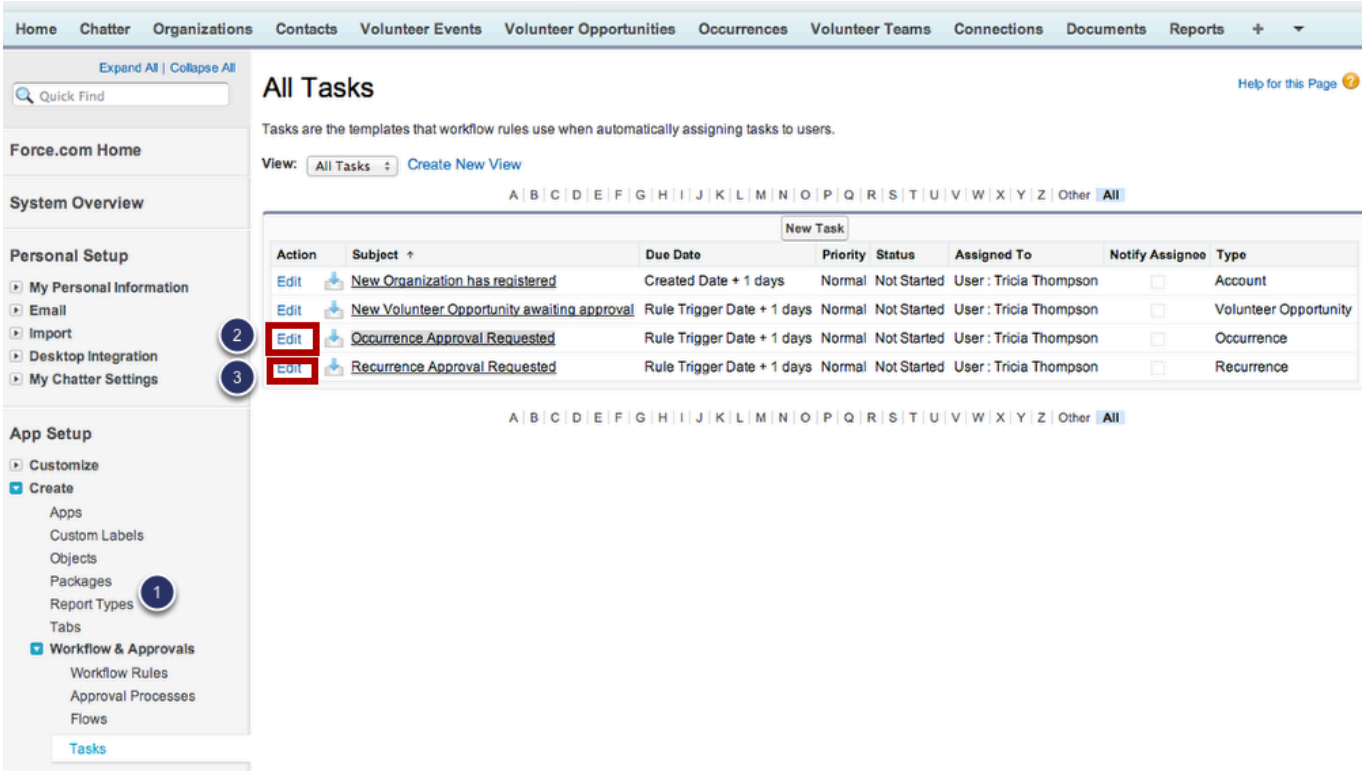
(Set search to Group, in order to find the Opportunity Approval Manager Group)

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.

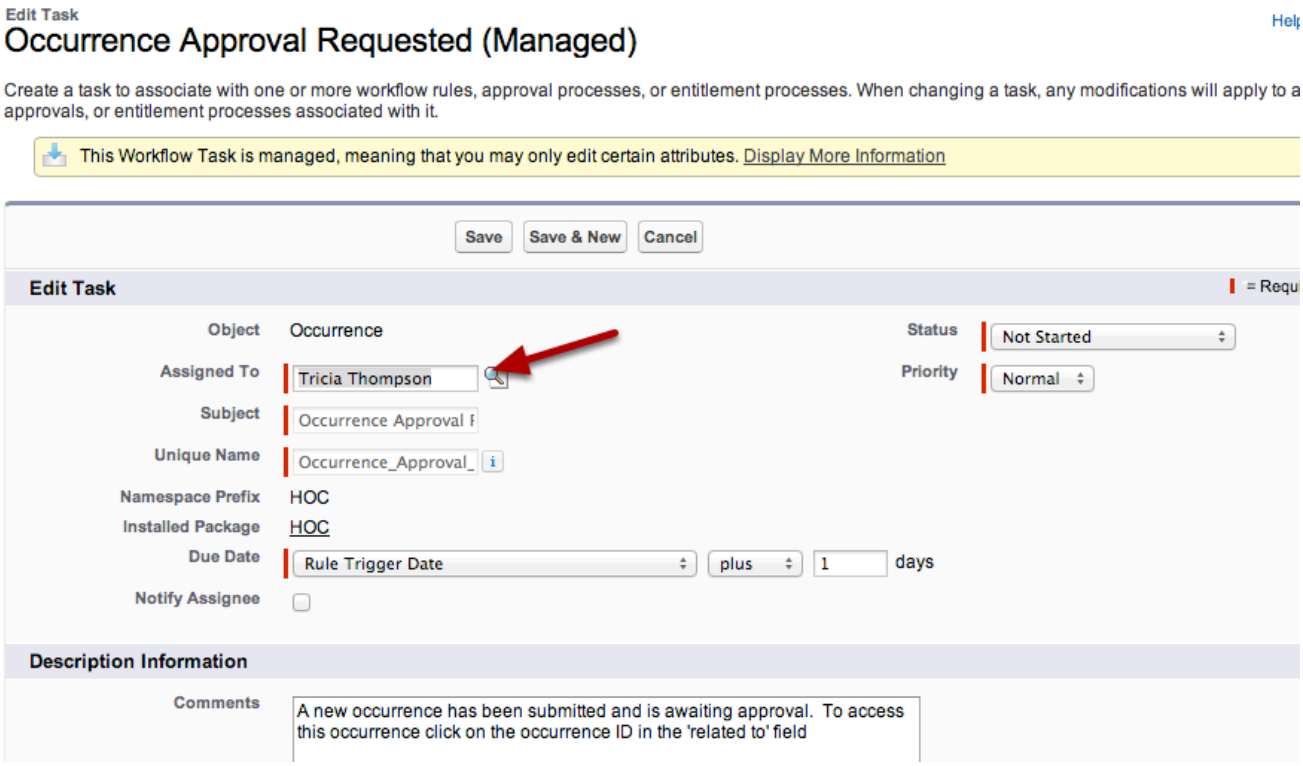
Note: The email alert "Opportunity Approval Requested" is no longer used.

Update two task records:



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



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.

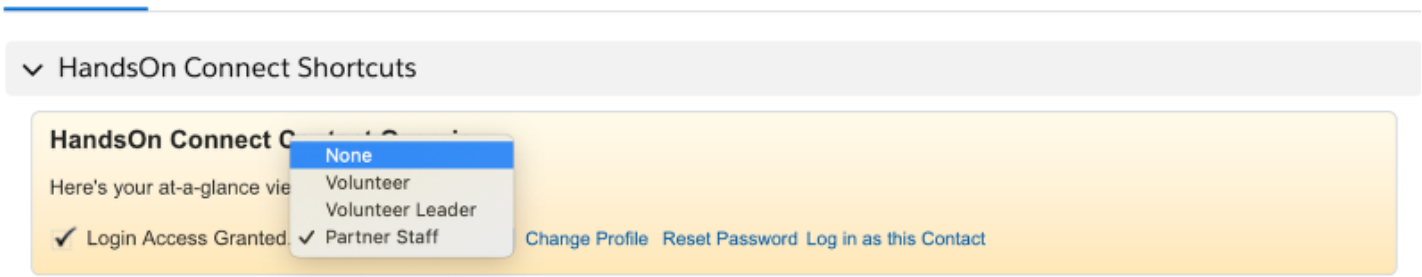
Do the same for all occurrences where they are the coordinator.

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.

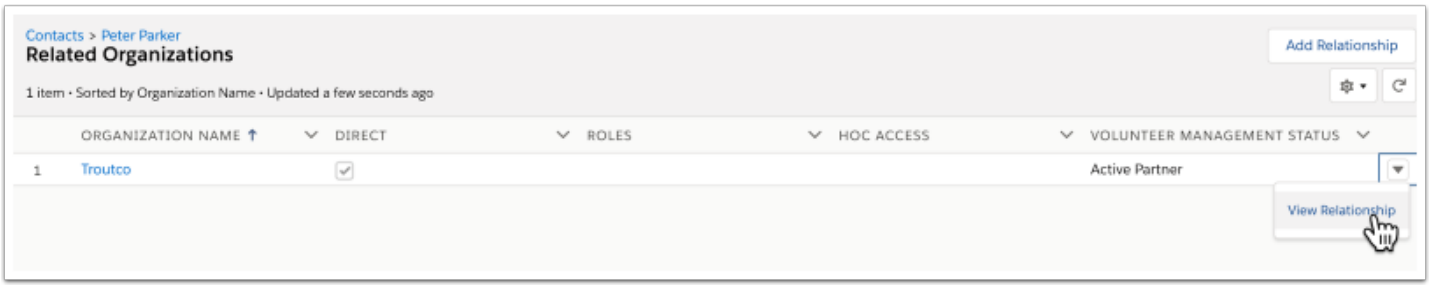
Deactivate their portal access for the organization.

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



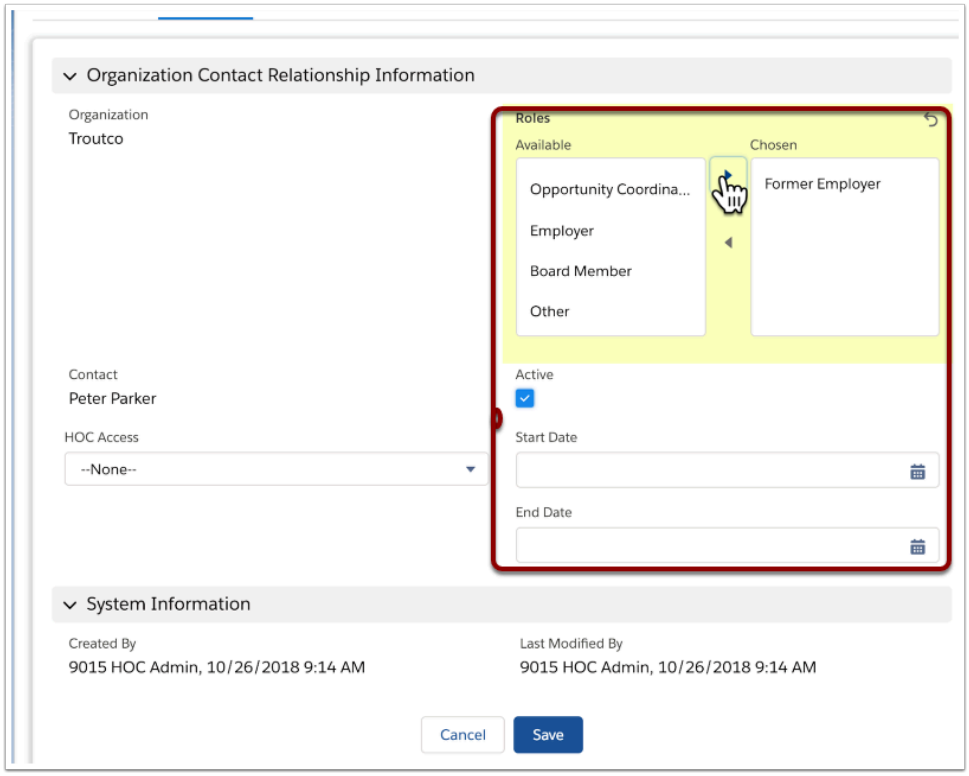
(Optional) Update their Related Organization record:

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".

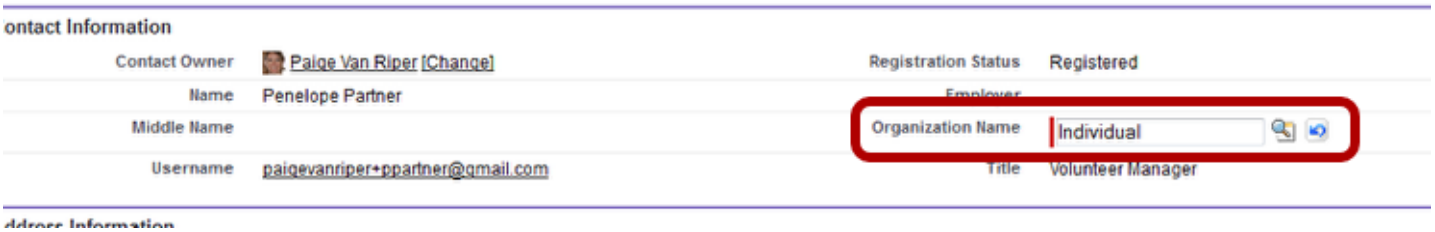


Uncheck the "Active" box and select a role that describes their prior relationship. (You can customize the roles available to include an item like "Former Employer".

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



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



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

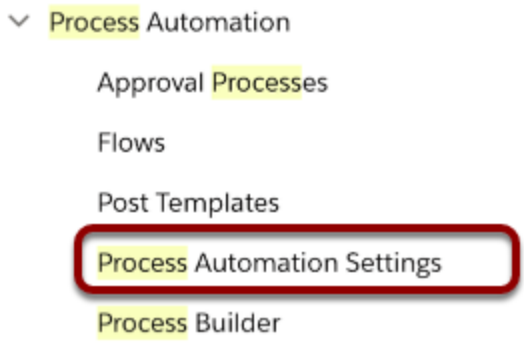
By default, workflows typically use one email address as the sender of email alerts in the system. This is called the default workflow user.

(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)

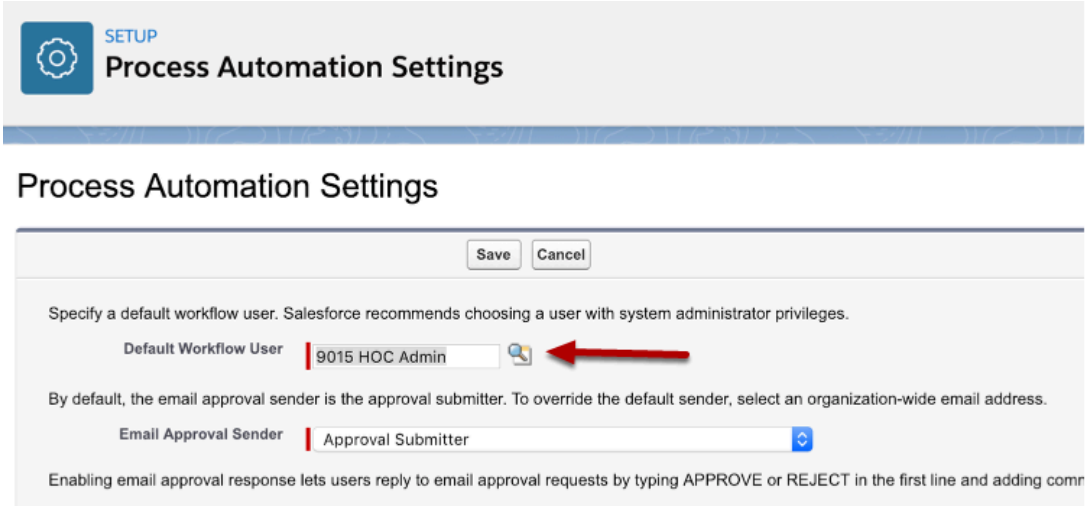
If you have a staff person leaving the organization, before you can deactivate their salesforce license you'll need to designate someone else to be the default workflow user.

Default Workflow User

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



Changing Default Workflow User



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.

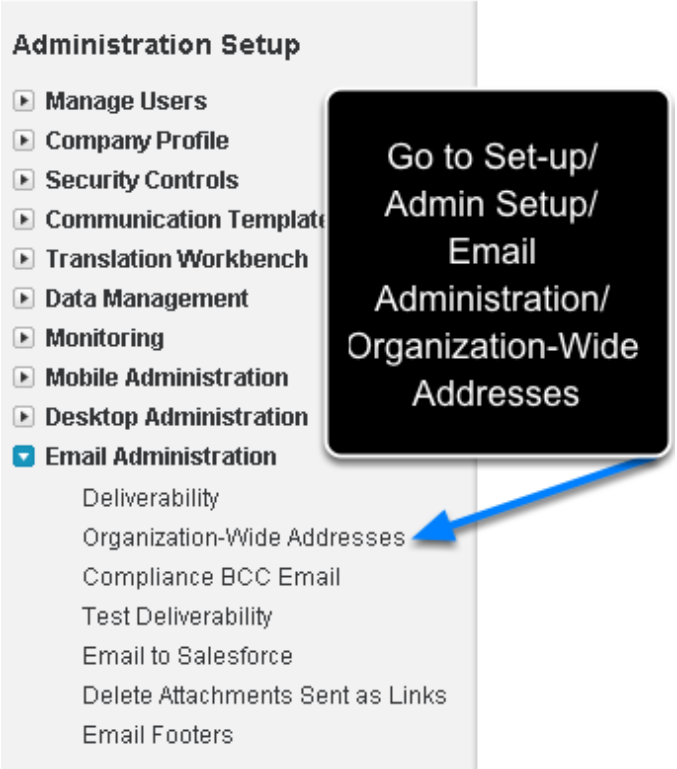
Customers can create as many organization wide email addresses and grant access to various profile to use them. More information on the organization wide email address can be found at salesforce.com Help & Training.

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.

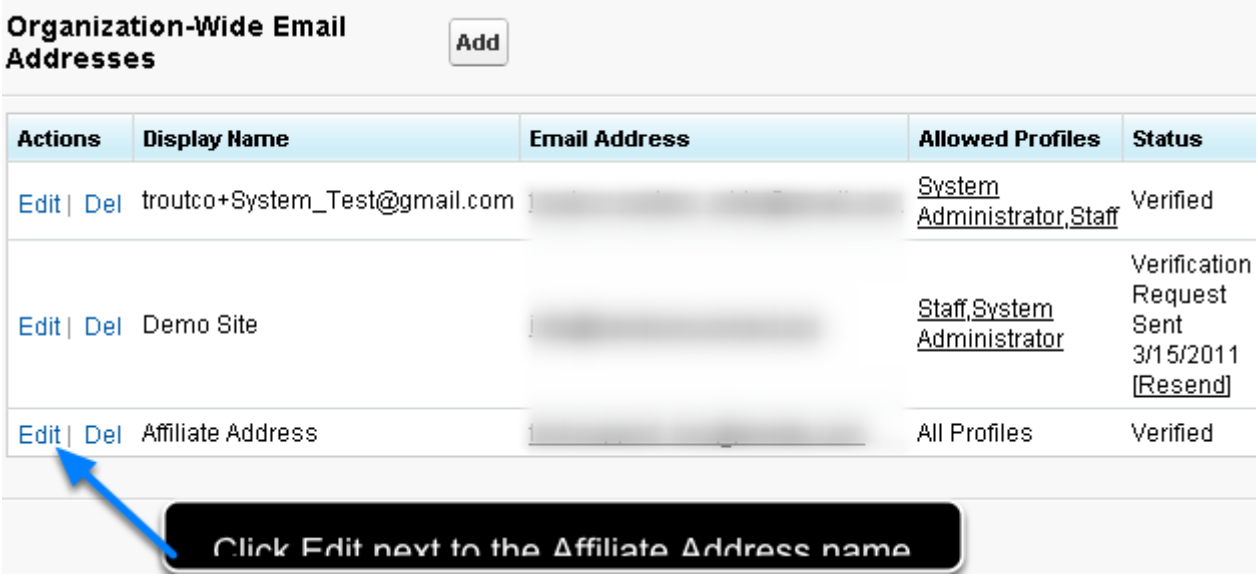
An example of this is the "Waitlisted Opportunity Now Open" email alert.

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.

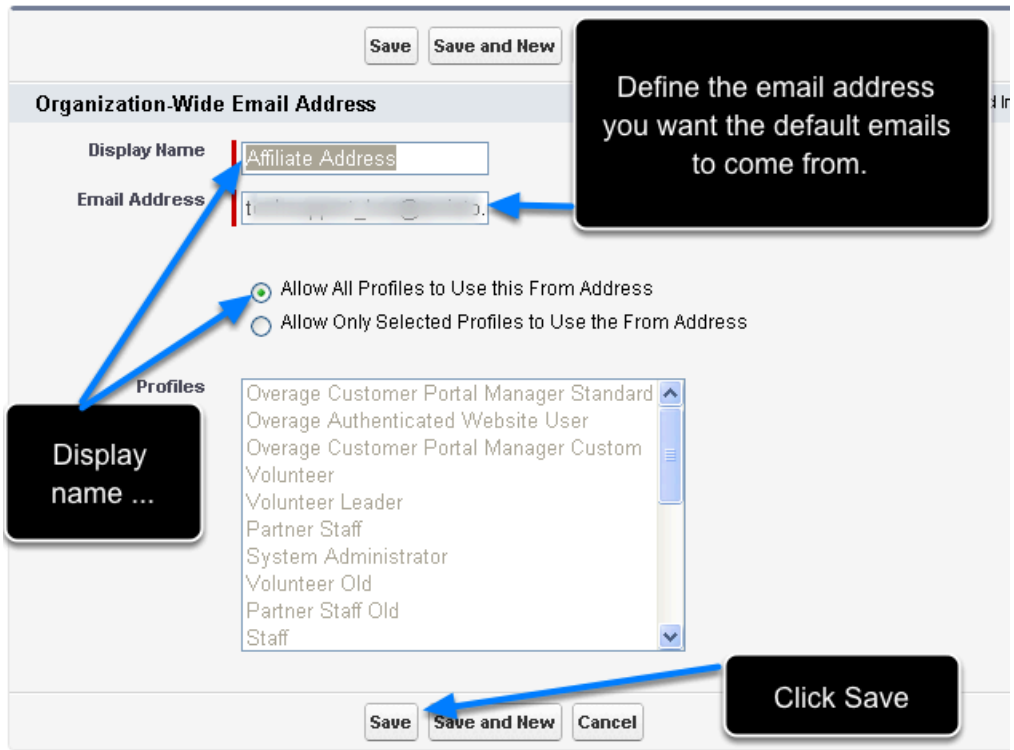
Accessing Organization-Wide Email Addresses



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

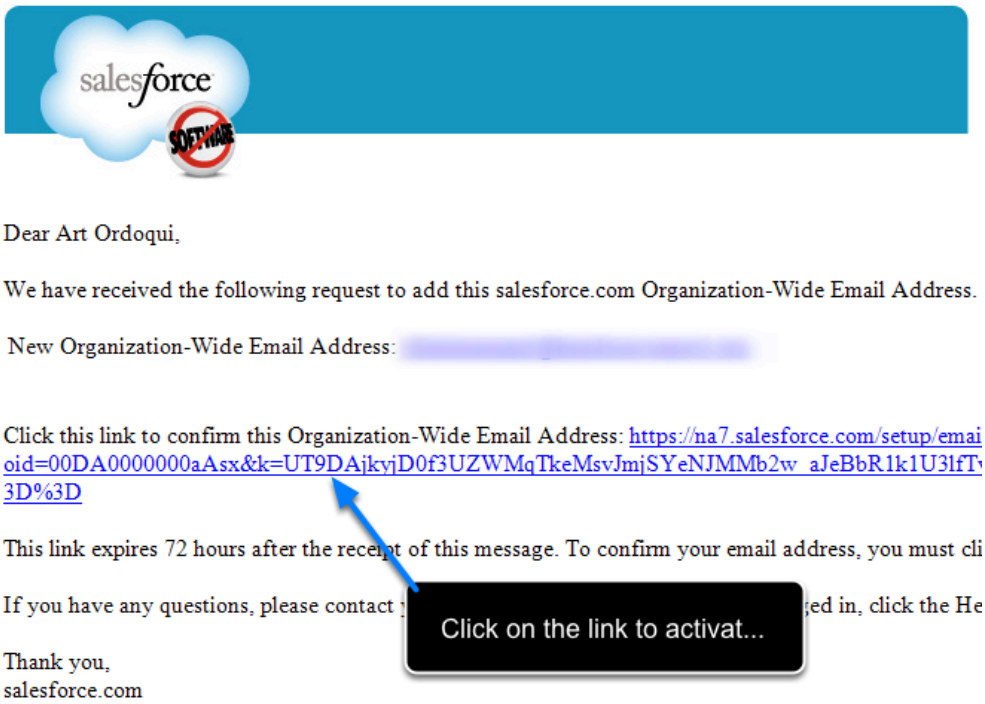


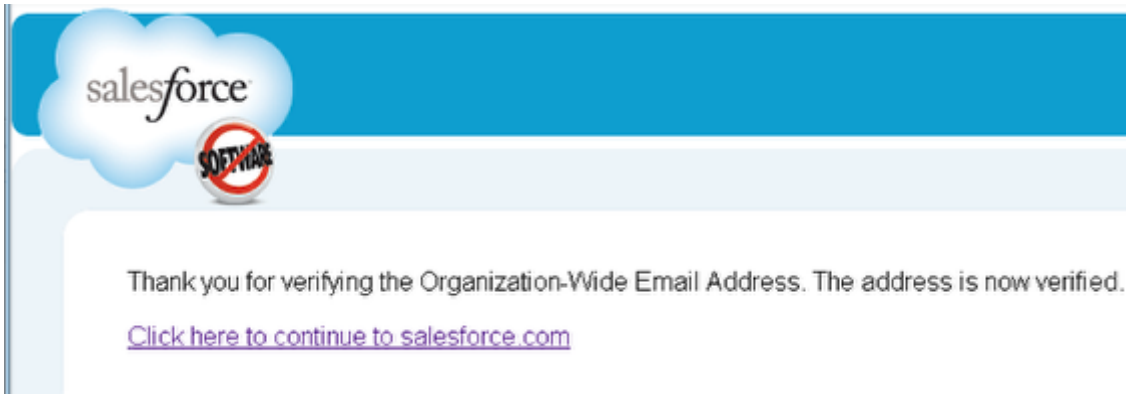
It was originally required to be named Affiliate Address - but now you can give it any name you choose.

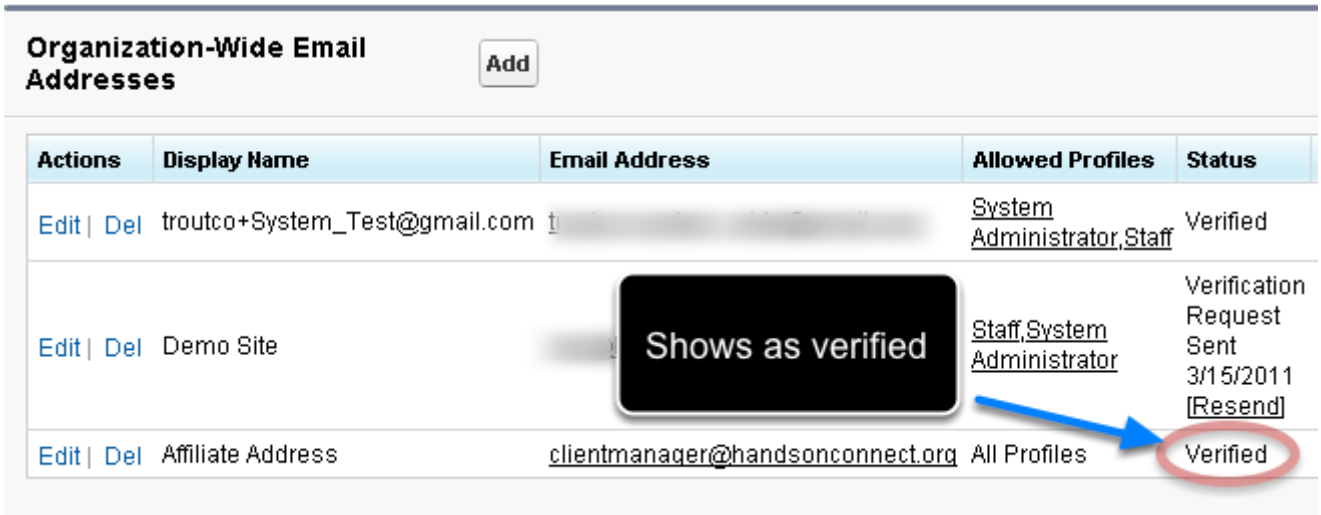


The reason to allow all profiles is that if you use this From Address for an email alert that is triggered from the public site by a volunteer (such as notification of Volunteer Sign-ups or Waitlisted Opportunity Now Open) if the Volunteer profile doesn't have access to this From Address then it could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



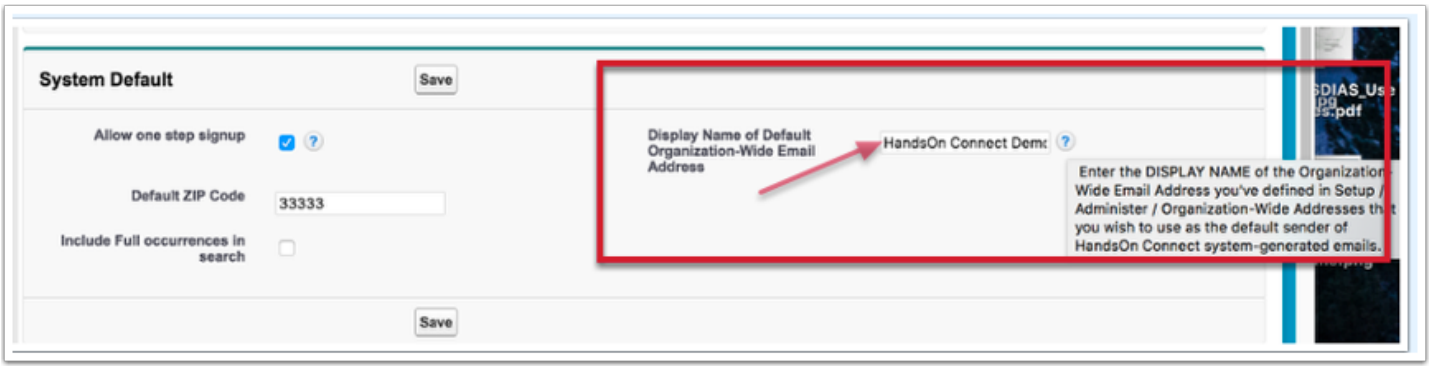




Once you've defined the name of the organization-wide

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!



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 1in this post):

Creating new organization-wide email addresses

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

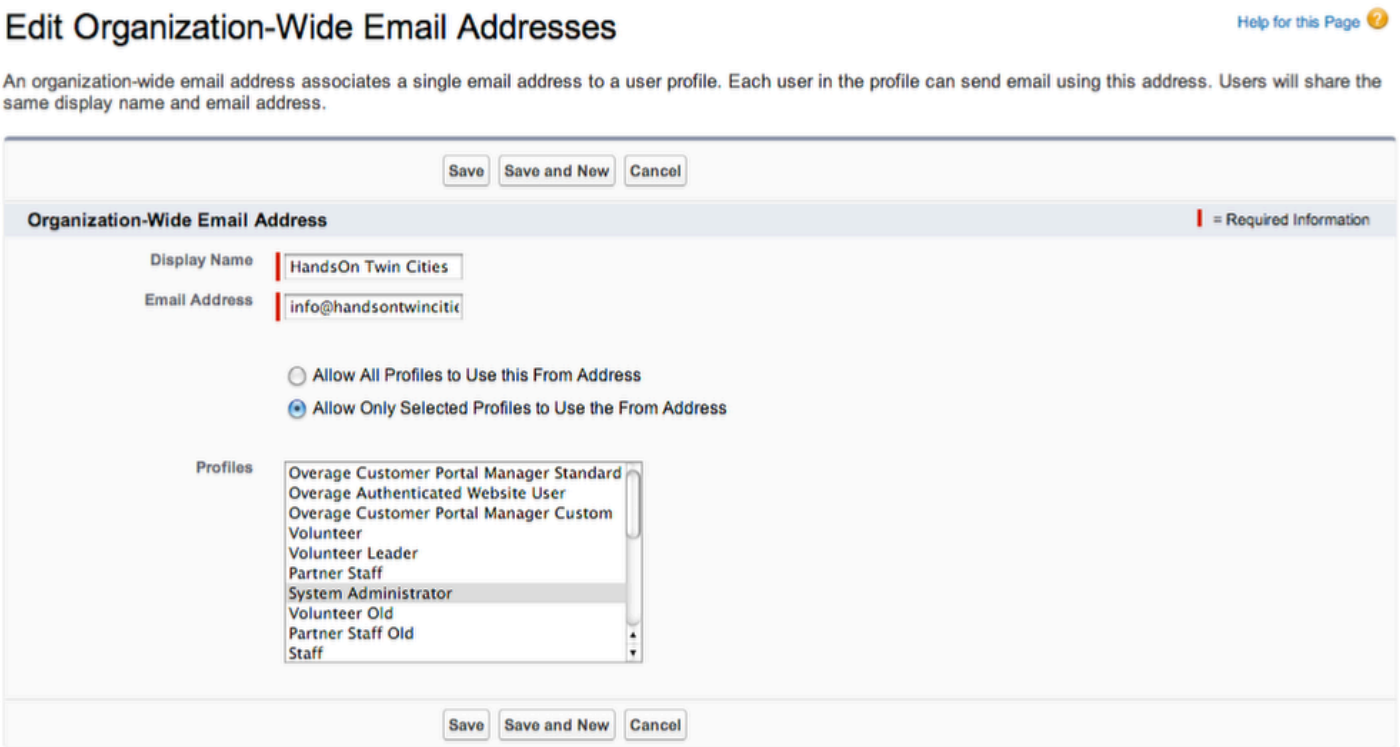
These become available to use as FROM addresses for email alerts, or for any manual emails sent from Salesforce.

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

Creating a new Organization-Wide Email Address

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

Click on the **ADD** button



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 signup.	rsing	1/11/2012

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

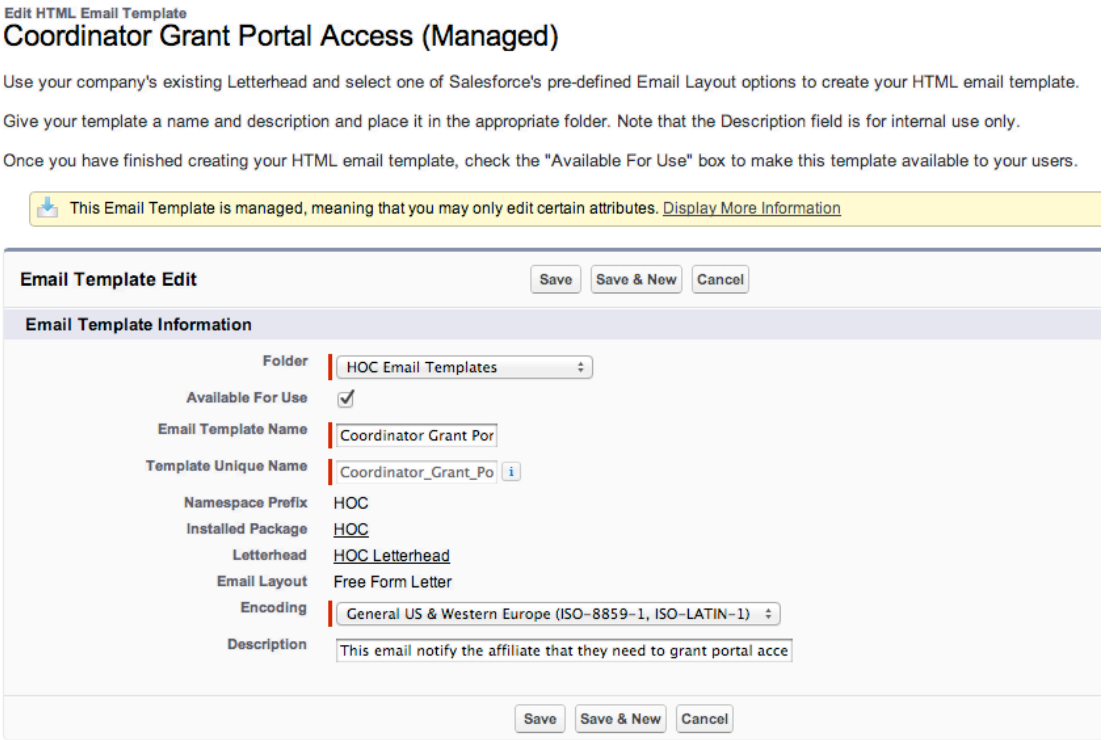
You should see an email template that matches each of the ones found in the zipped archive.

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

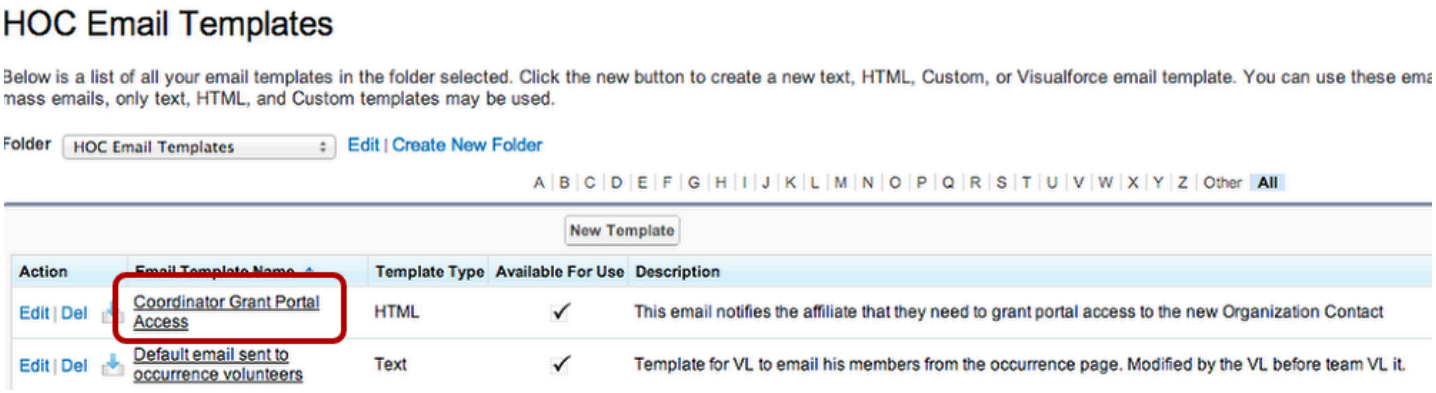


Update the email description if your new version has an improved description. (Feel free to update it further if you want to use your own language to make it clearer to you what the email template does).

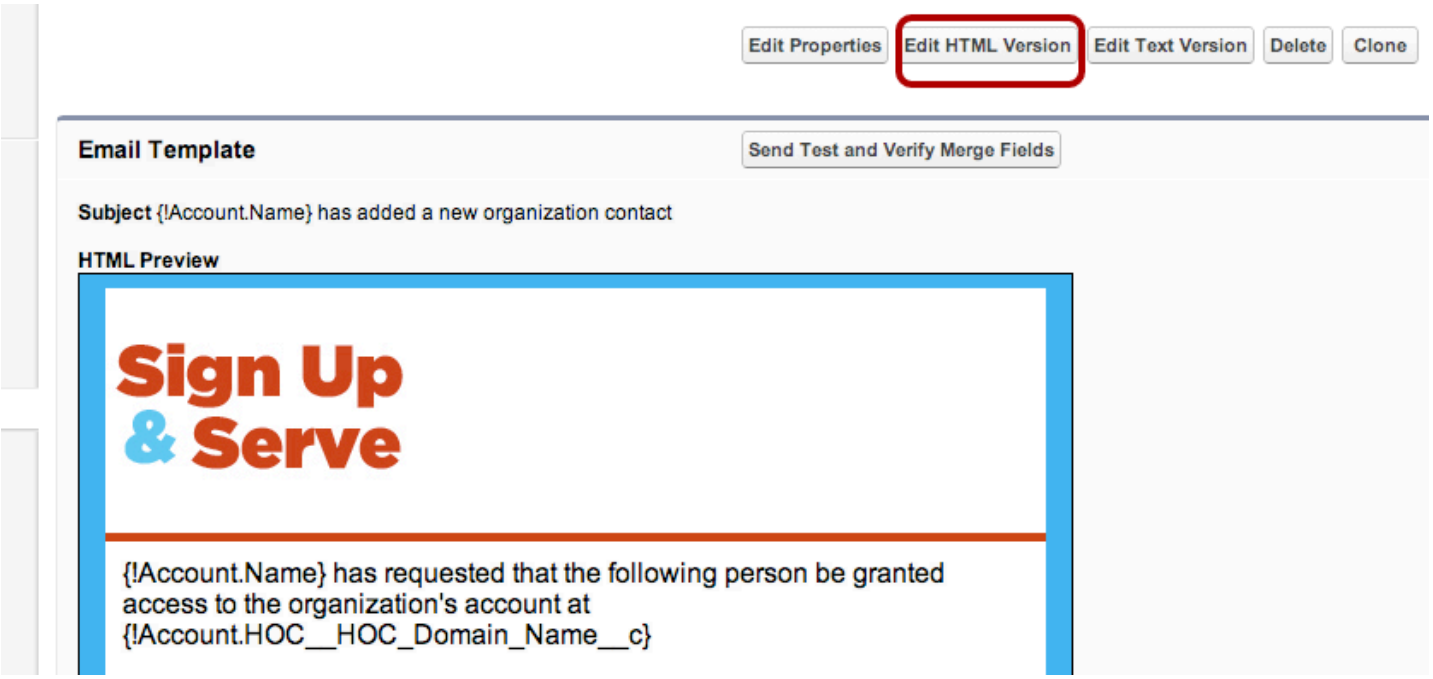
SAVE the change.

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:



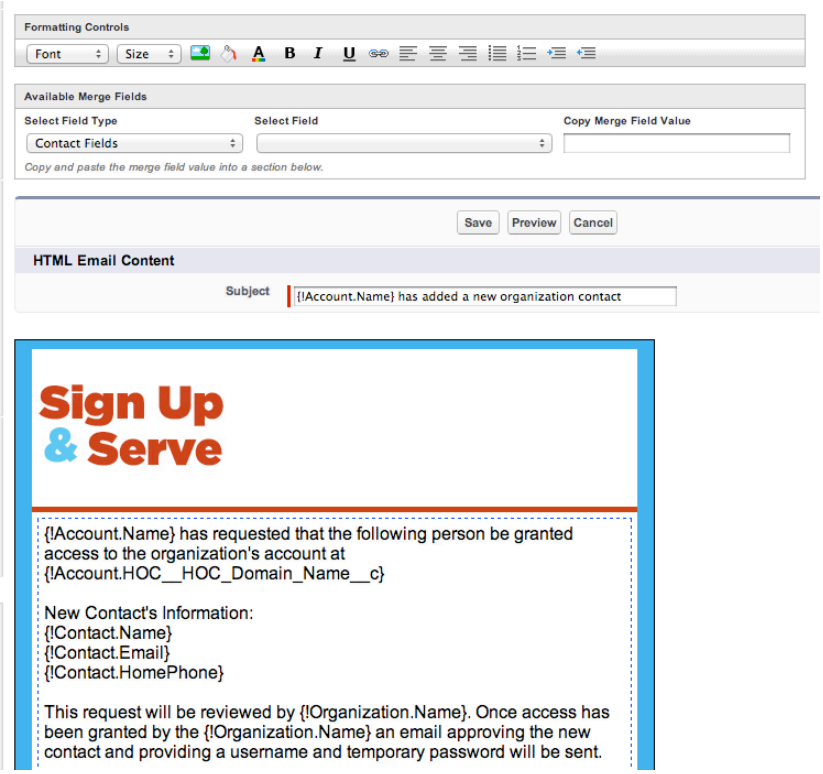
Then click on the "Edit HTML" button.



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.



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.

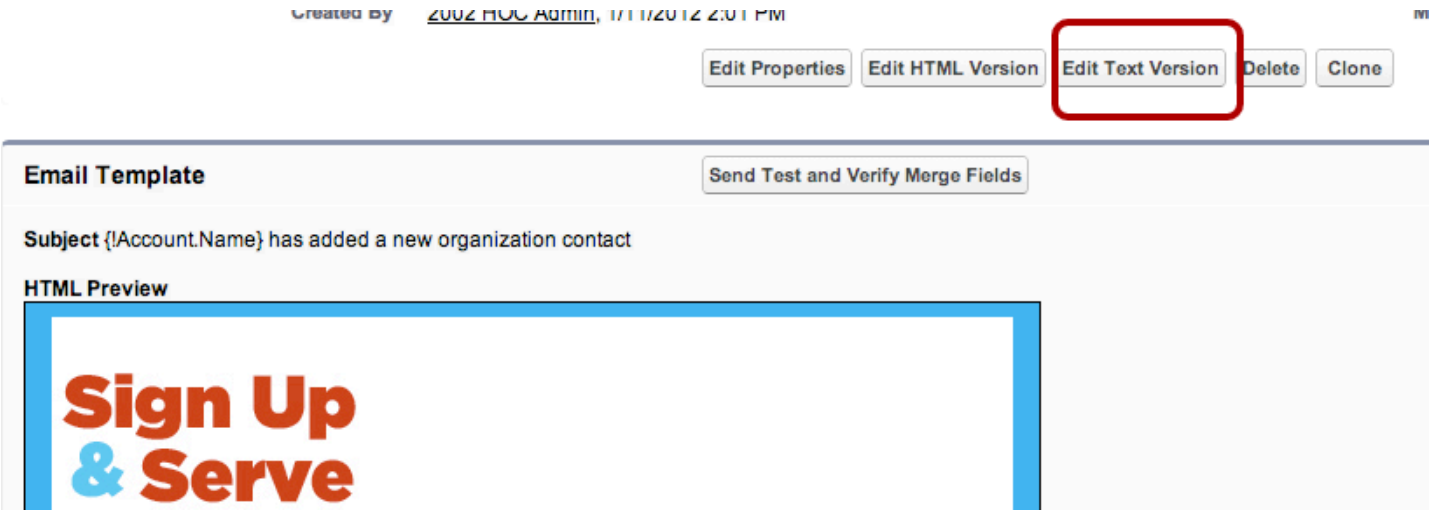
If you are satisfied with the look of the email:

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

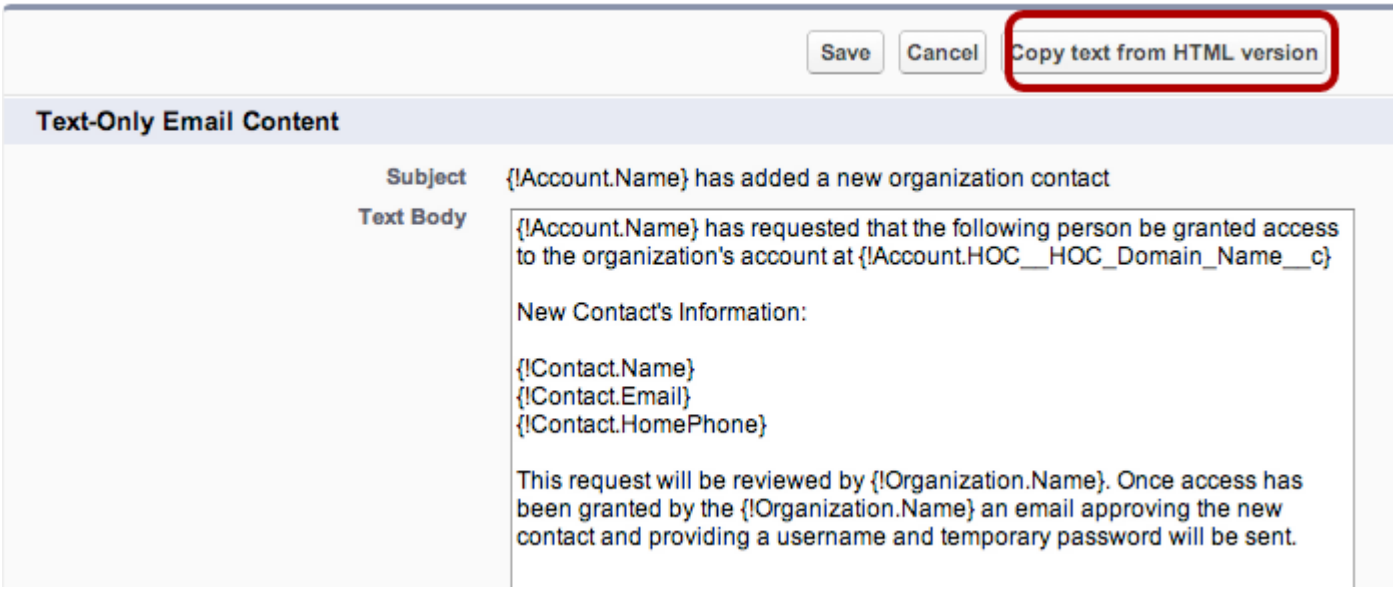


Click on "Edit Text Version"

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.



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.

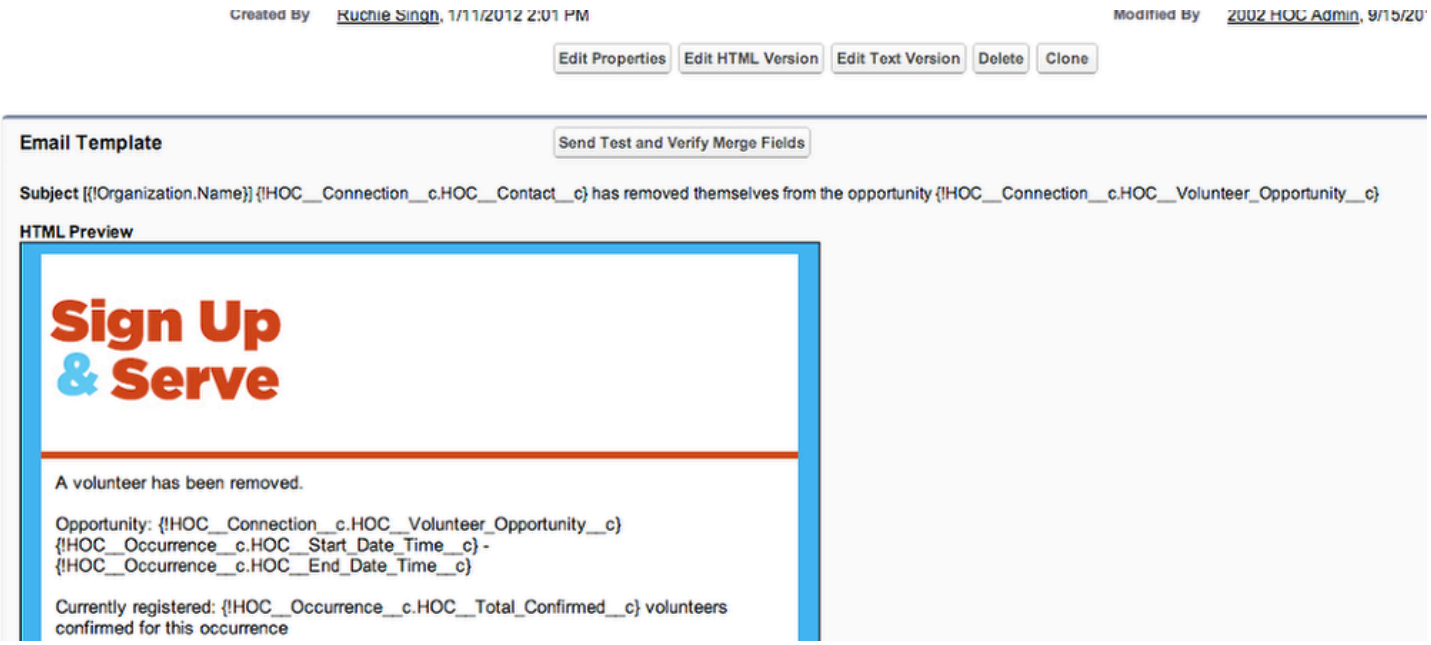
If you want to test the email template further, you can then choose to Send a Test and Verify Merge Fields.

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



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.

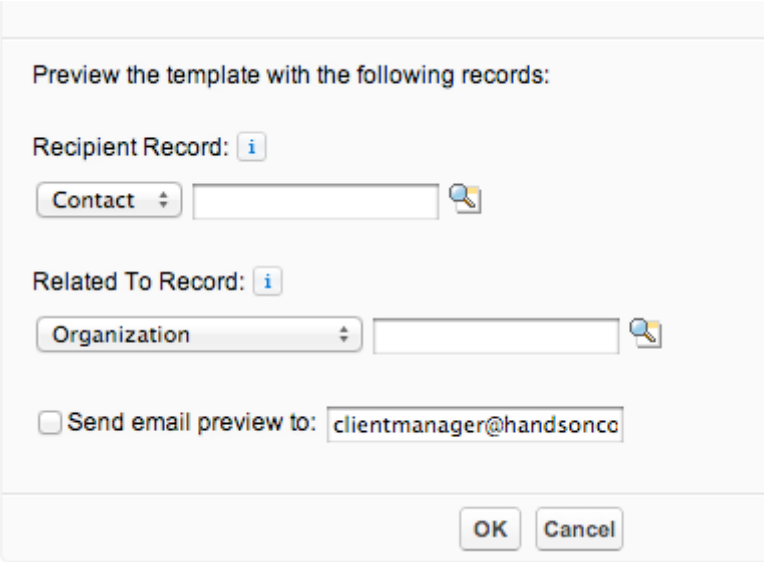
Let's try testing the email template "Notification of Volunteer Removals"

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



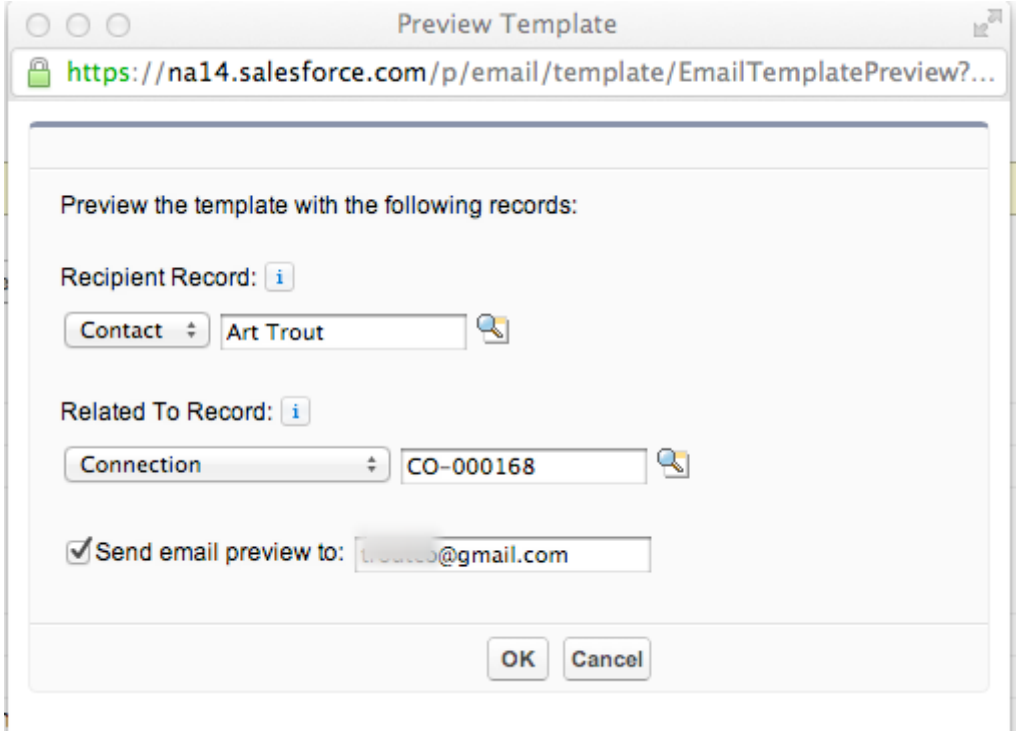
You are asked for 3 things here:

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.

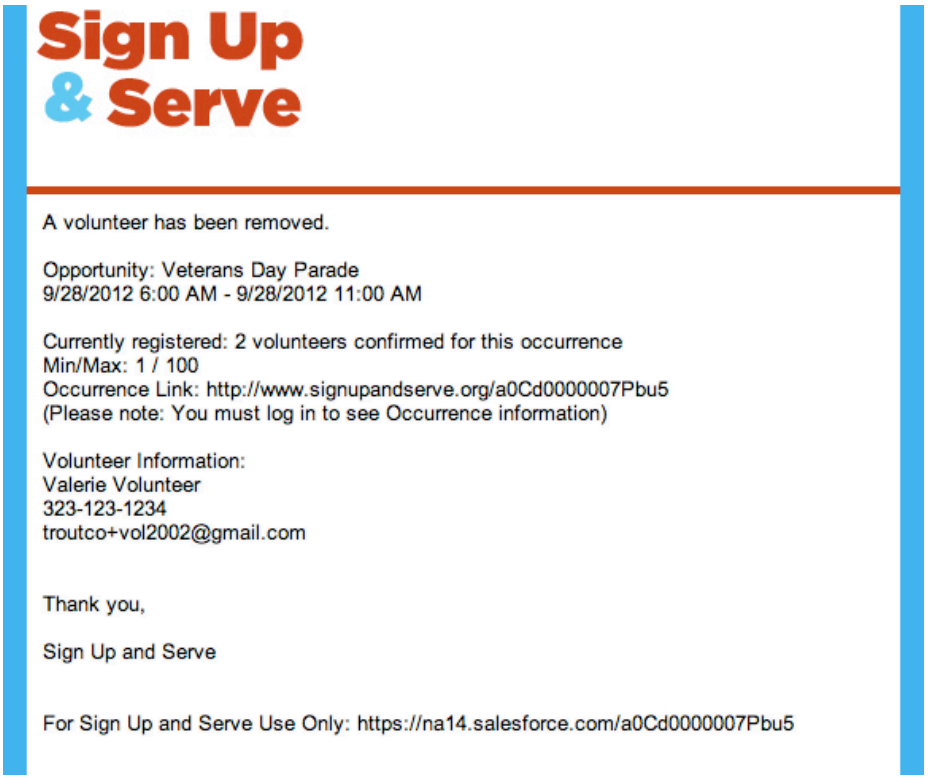
2) Related to Record: This is what confuses most people. You don't want to look up an organization here. Instead you need to drop down the picklist and select a record of type "Connection". This should be a connection in your data where someone is in status removed.

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!



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



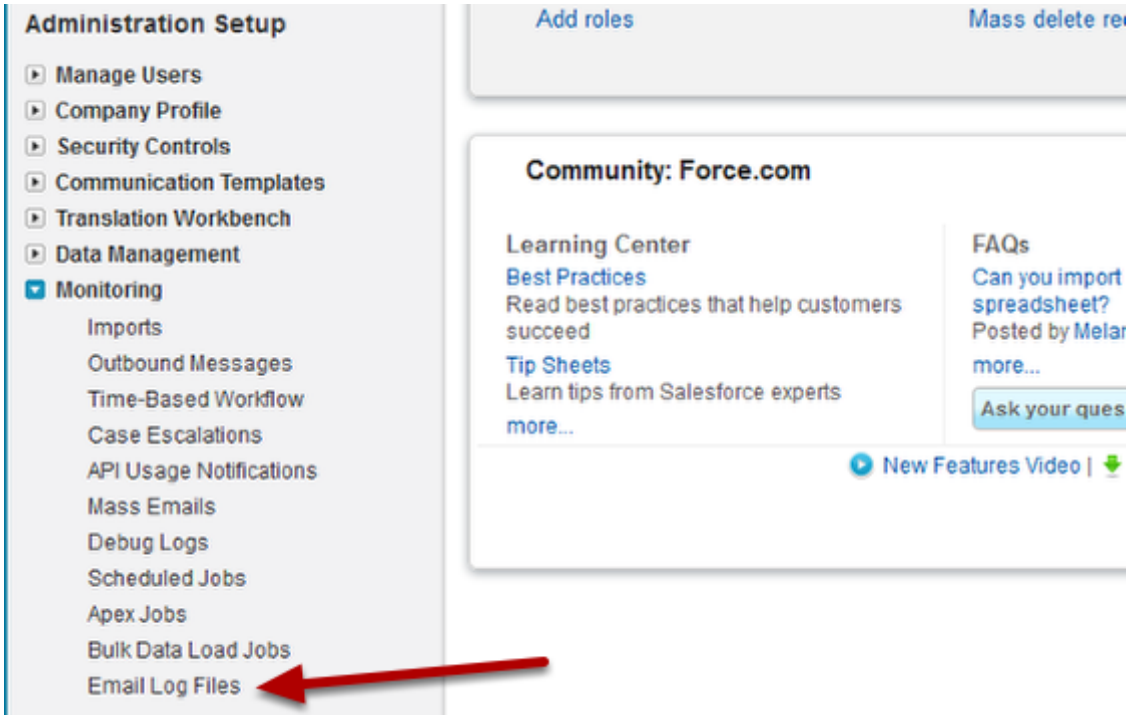
Notice, all the merge fields are filled in.

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

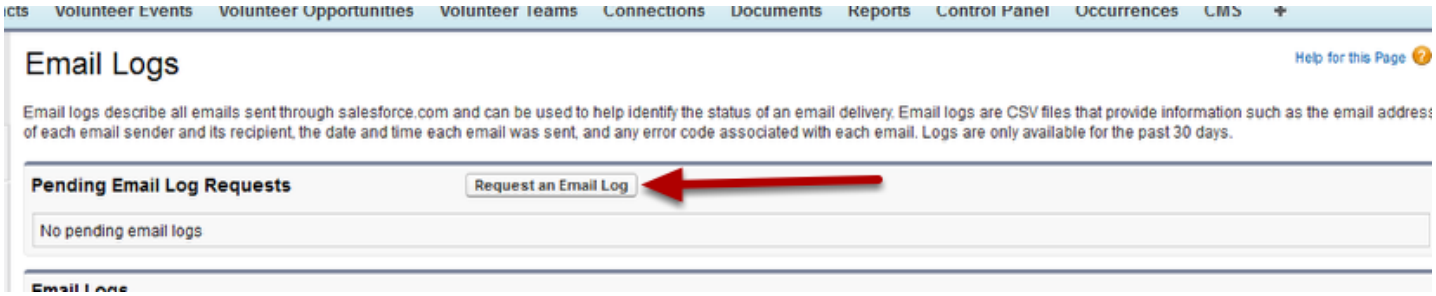
Note: There are a few email templates where several objects are involved in producing all the necessary merge fields. These aren't controlled by workflows, but are triggered by apex triggers. For these, the only way to test that all merge fields from a range of objects will work - is to simulate the 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

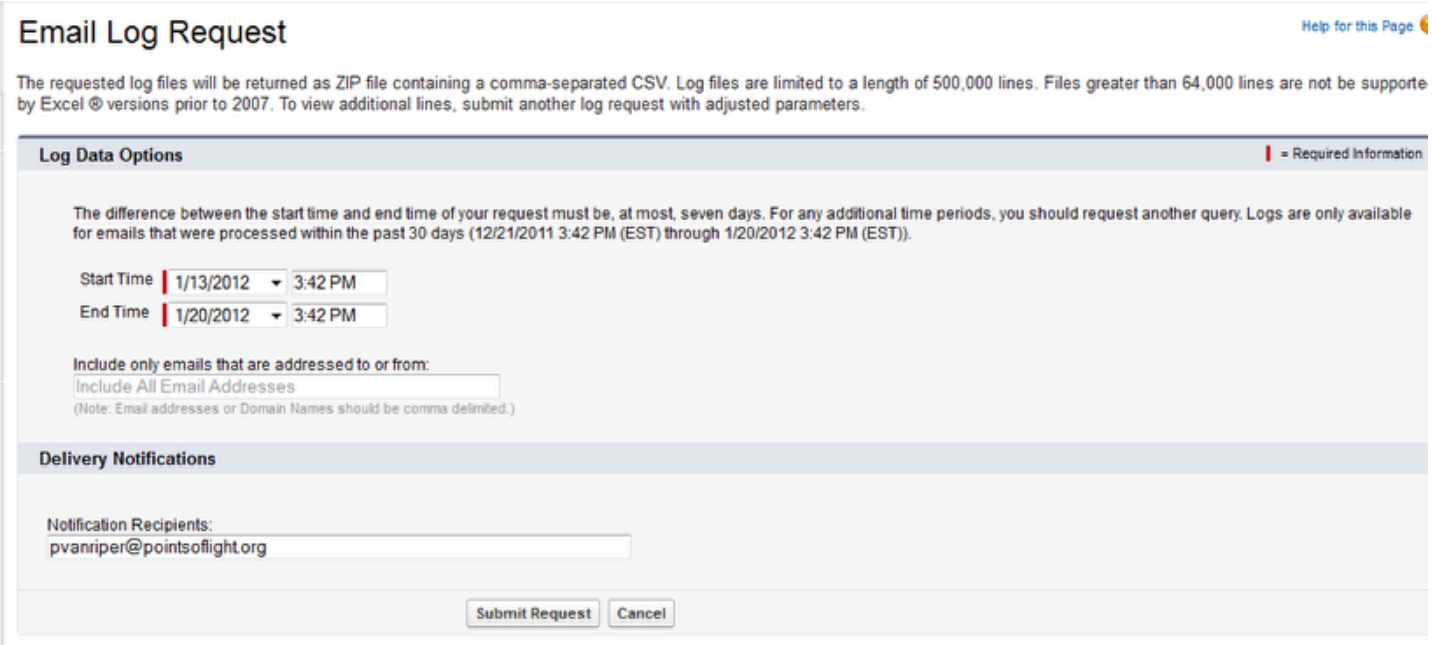
How many times have you had a volunteer tell you they never received a particular email when you're pretty darn sure it was sent? Ever wished you could check? Well you can. Salesforce allows you to run a log of emails sent from the system. Email logs are CSV files that contain information about all email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



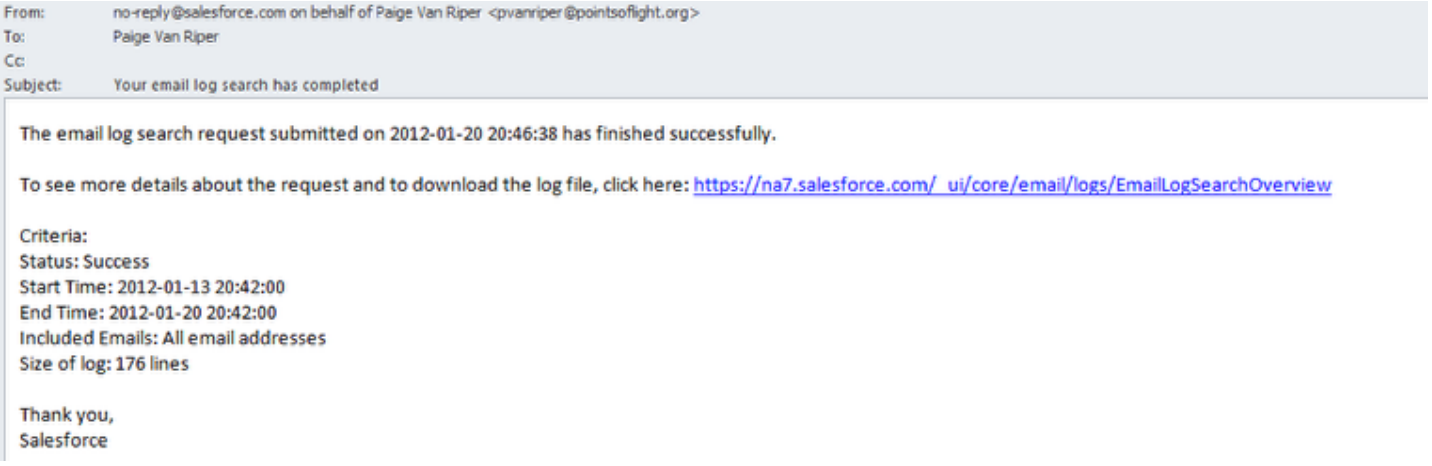
Go to Setup/Administration Setup/Monitoring and click on Email Log Files.



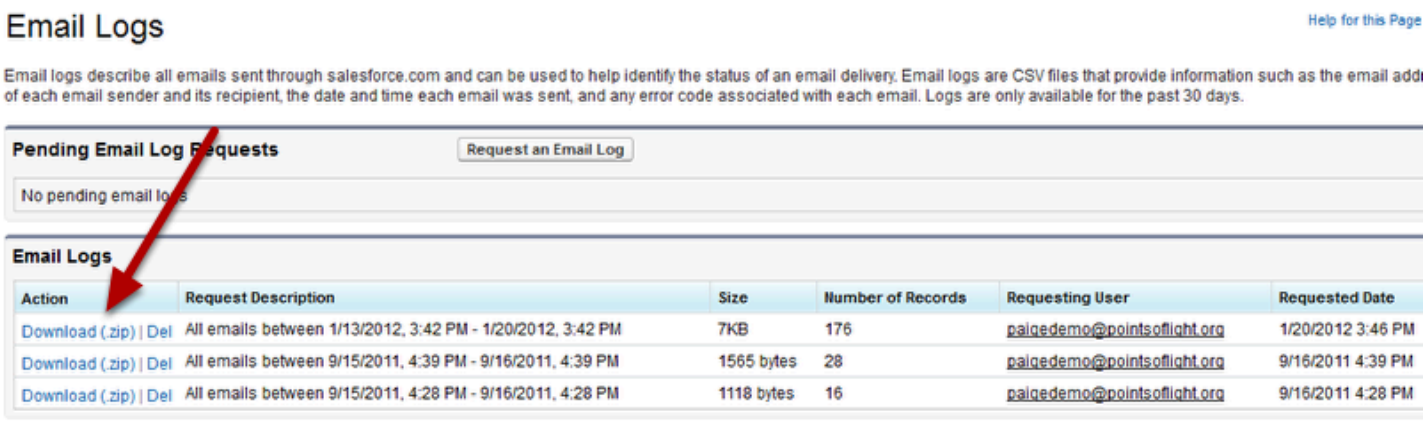
Then click on Request an Email log.



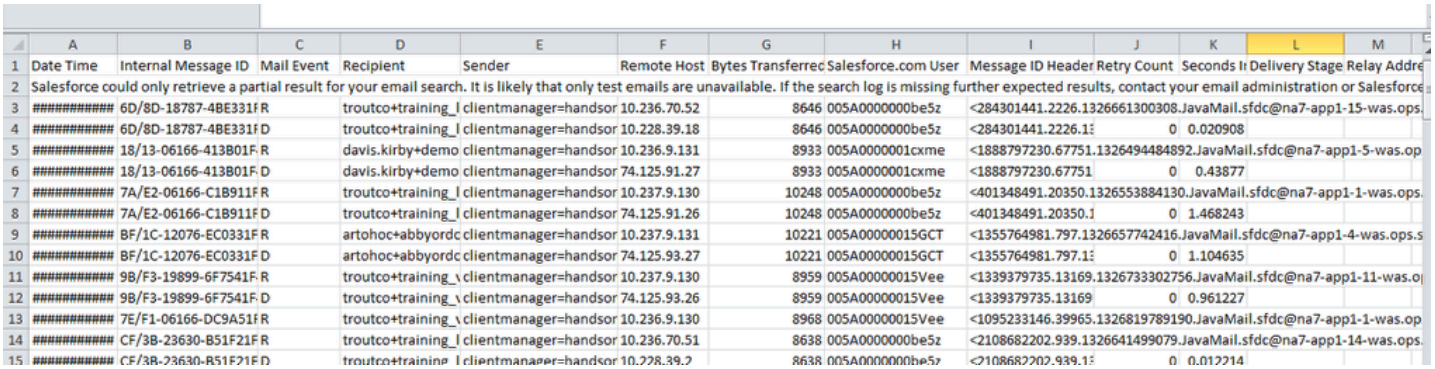
You will then specity the start date and time and end date and time for the range you wish to run. If you are looking to see if a particular contact was sent an email you would put the contact's email address in the next field and finally specify what email address you want to be notified at when the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



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.



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
1	Date Time	Internal Message ID	Mail Event	Recipient	Sender	Remote Host	Bytes Transferred	Salesforce.com User	Message ID Header	Retry Count	Seconds I	Delivery Stage	Relay Addre
2	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												
3	###########	6D/8D-18787-4BE331F	R	troutco+training_l	clientmanager=handsor	10.236.70.52	8646	005A0000000be5z	<284301441.2226.1326661300308.			JavaMail.sfdc@na7-app1-15-was.ops.	
4	###########	6D/8D-18787-4BE331F	D	troutco+training_l	clientmanager=handsor	10.228.39.18	8646	005A0000000be5z	<284301441.2226.1	0	0.020908		
5	###########	18/13-06166-413B01F	R	davis.kirby+demo	clientmanager=handsor	10.236.9.131	8933	005A0000001cxme	<1888797230.67751.1326494484892.			JavaMail.sfdc@na7-app1-5-was.op	
6	###########	18/13-06166-413B01F	D	davis.kirby+demo	clientmanager=handsor	74.125.91.27	8933	005A0000001cxme	<1888797230.67751	0	0.43877		
7	###########	7A/E2-06166-C1B911F	R	troutco+training_l	clientmanager=handsor	10.237.9.130	10248	005A0000000be5z	<401348491.20350.1326553884130.			JavaMail.sfdc@na7-app1-1-was.ops.	
8	###########	7A/E2-06166-C1B911F	D	troutco+training_l	clientmanager=handsor	74.125.91.26	10248	005A0000000be5z	<401348491.20350.1	0	1.468243		
9	###########	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.s	
10	###########	BF/1C-12076-EC0331F	D	artohoc+abbyordc	clientmanager=handsor	74.125.93.27	10221	005A00000015GCT	<1355764981.797.13	0	1.104635		
11	###########	9B/F3-19899-6F7541F	R	troutco+training_\	clientmanager=handsor	10.237.9.130	8959	005A00000015Vee	<1339379735.13169.1326733302756.			JavaMail.sfdc@na7-app1-11-was.o	
12	###########	9B/F3-19899-6F7541F	D	troutco+training_\	clientmanager=handsor	74.125.93.26	8959	005A00000015Vee	<1339379735.13169	0	0.961227		
13	###########	7E/F1-06166-DC9A51F	R	troutco+training_\	clientmanager=handsor	10.236.9.130	8968	005A00000015Vee	<1095233146.39965.1326819789190.			JavaMail.sfdc@na7-app1-1-was.op	
14	###########	CF/3B-23630-B51F21F	R	troutco+training_l	clientmanager=handsor	10.236.70.51	8638	005A0000000be5z	<2108682202.939.1326641499079.			JavaMail.sfdc@na7-app1-14-was.ops.	
15	###########	CF/3B-23630-B51F21F	D	troutco+training_l	clientmanager=handsor	10.228.39.2	8638	005A0000000be5z	<2108682202.939.1	0	0.012214		

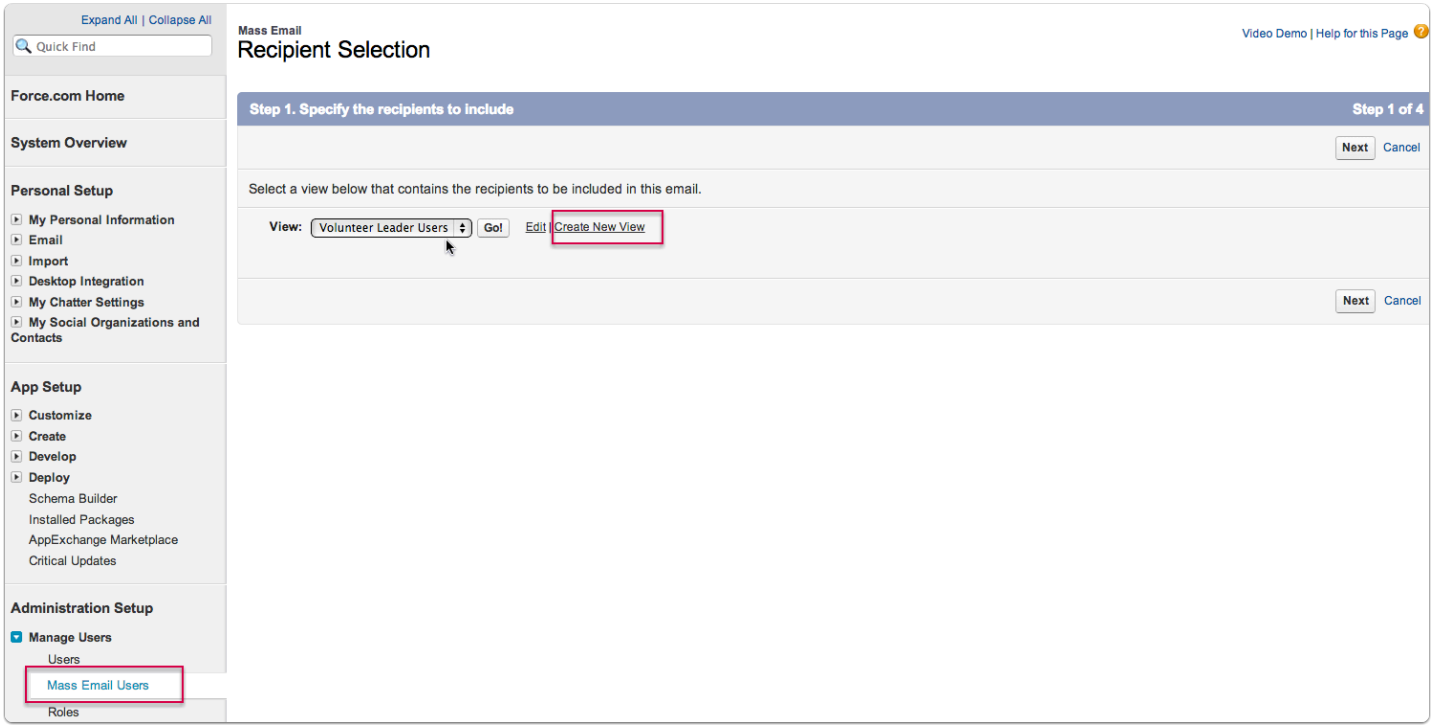
When you download the CSV file it will look like this. It contains the date and time the email was sent, an internal message ID, recipient and sender's email addresses, the delivery status of the email and any error codes associated with the email. You can use the error codes to troubleshoot email issues.

Mass Emailing in Salesforce

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

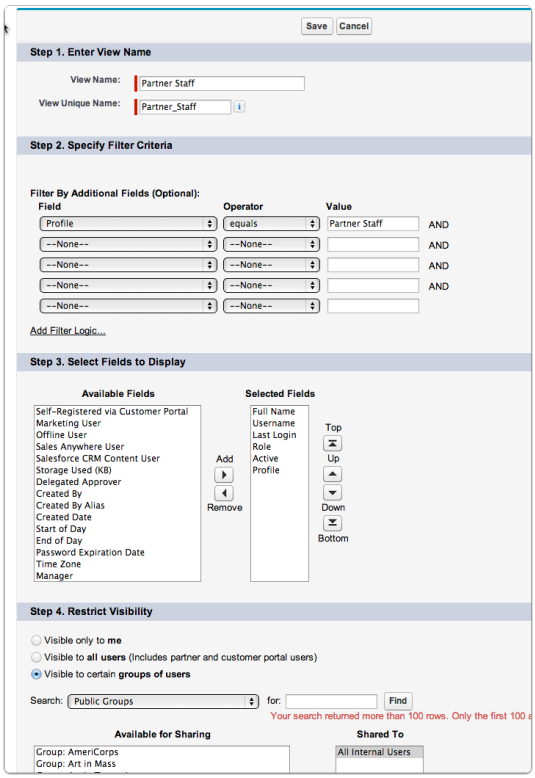
Click here for instructions on how to create an email template.

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



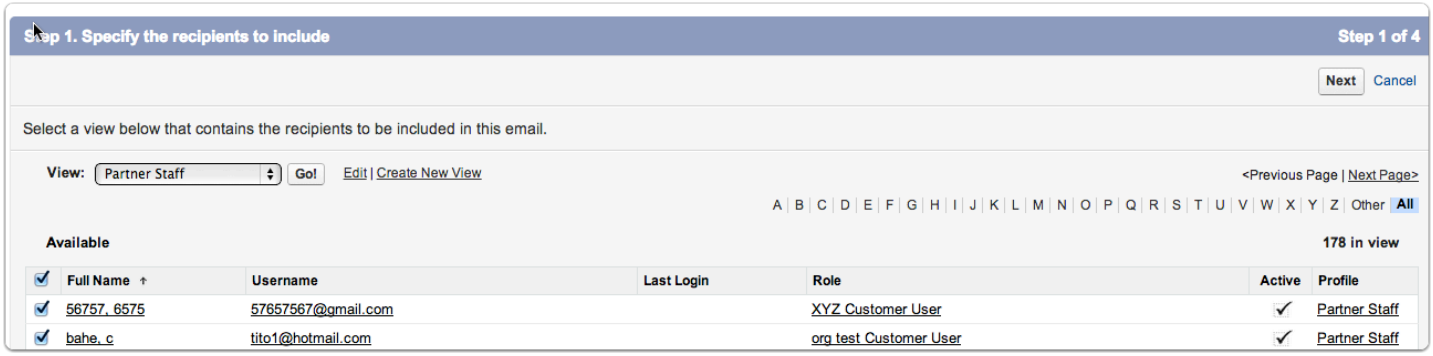
If you don't already have a view created from a prior mass email - click on Create New View.

Create a view in the usual way



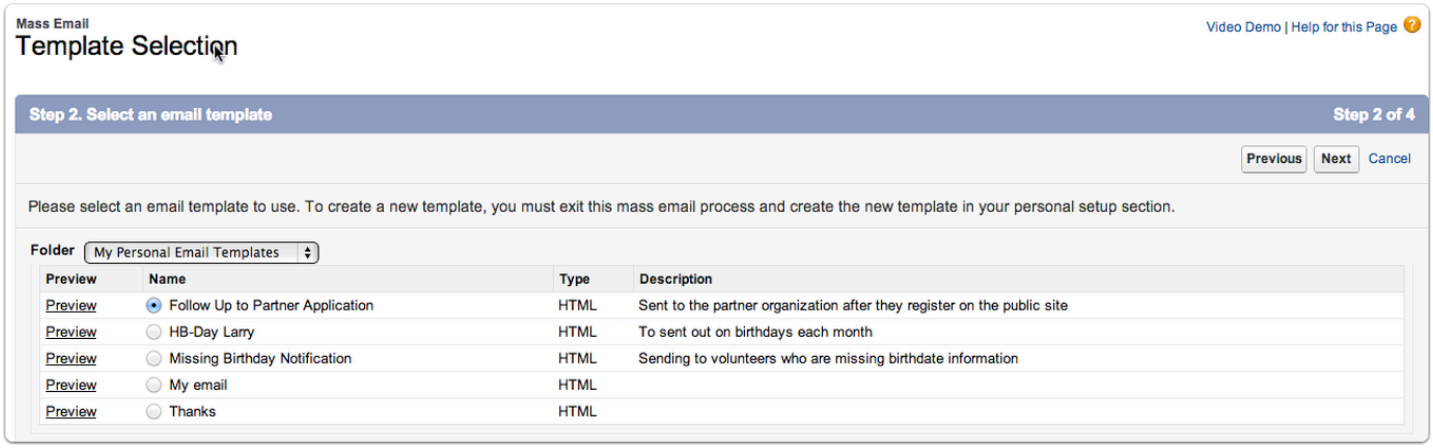
[See this post on how to create views.]

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



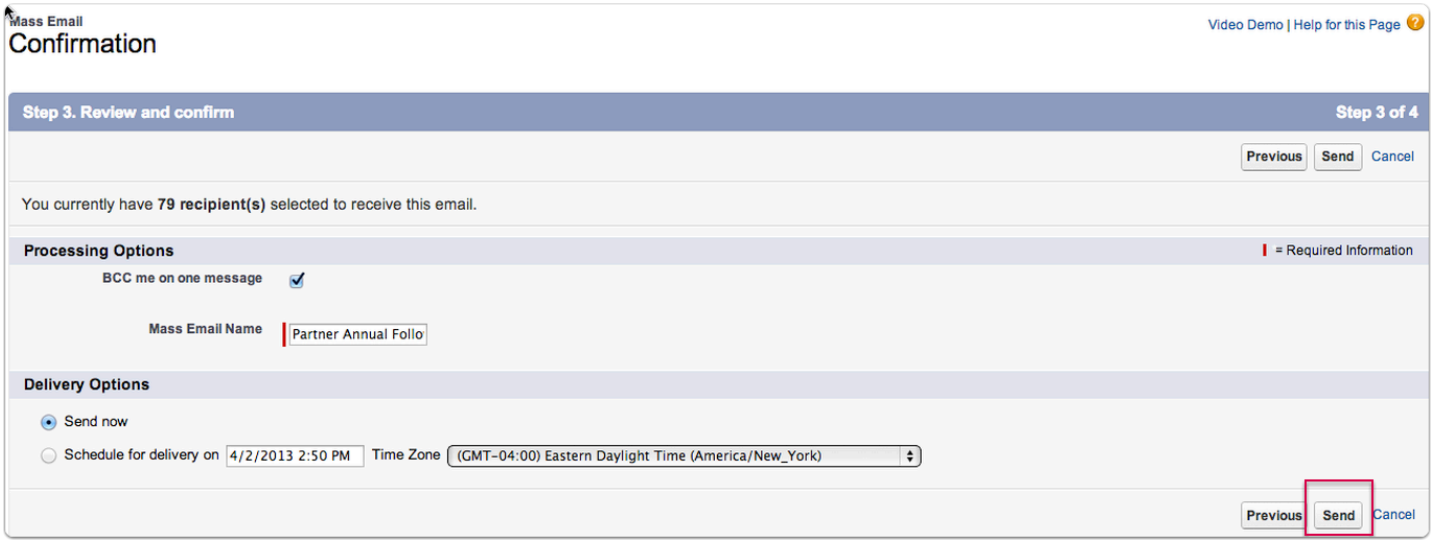
Note... Within the view you can optionally unselect individuals, further refining who your mass email is sent to. (Everyone in the view - or just some of the people in the view). Click on the Next Button.

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



Click Next.

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

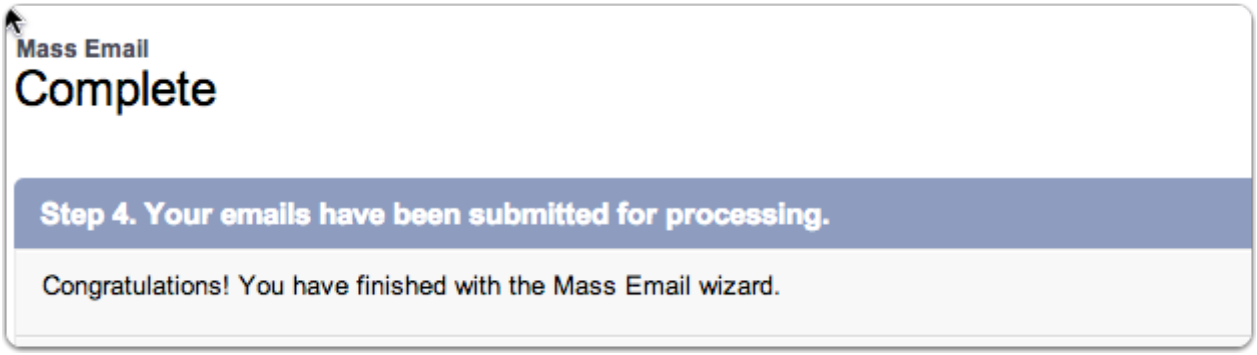


You have the option of BCCing yourself on one message so you know its gone out.

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

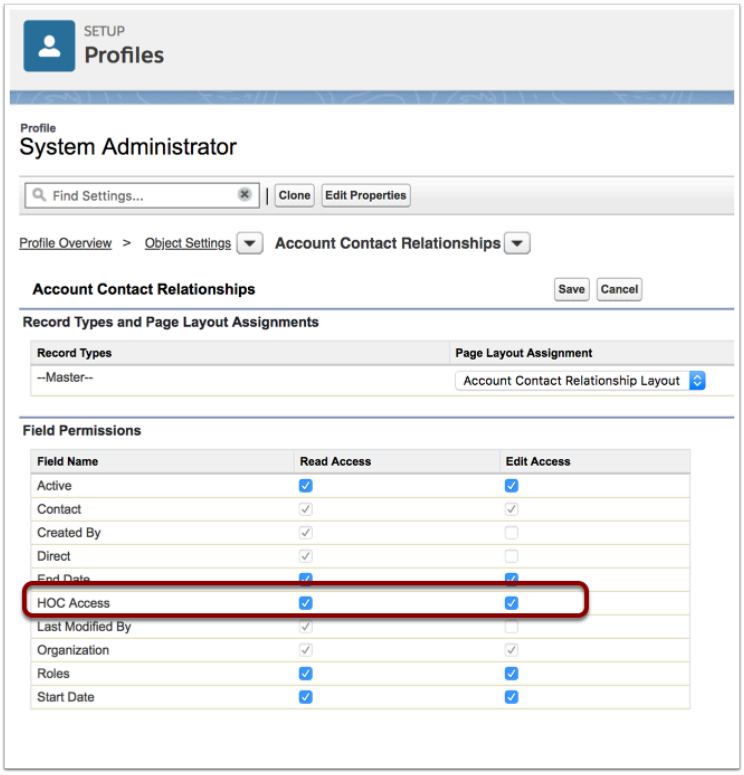
HOC 3.0, (March 2018 release and later) supports the ability to allow one contact to log into the sharing portal as partner staff for multiple organizations. Before you can use this ability, the System Administrator needs to perform the following speed up to their system.

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.



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

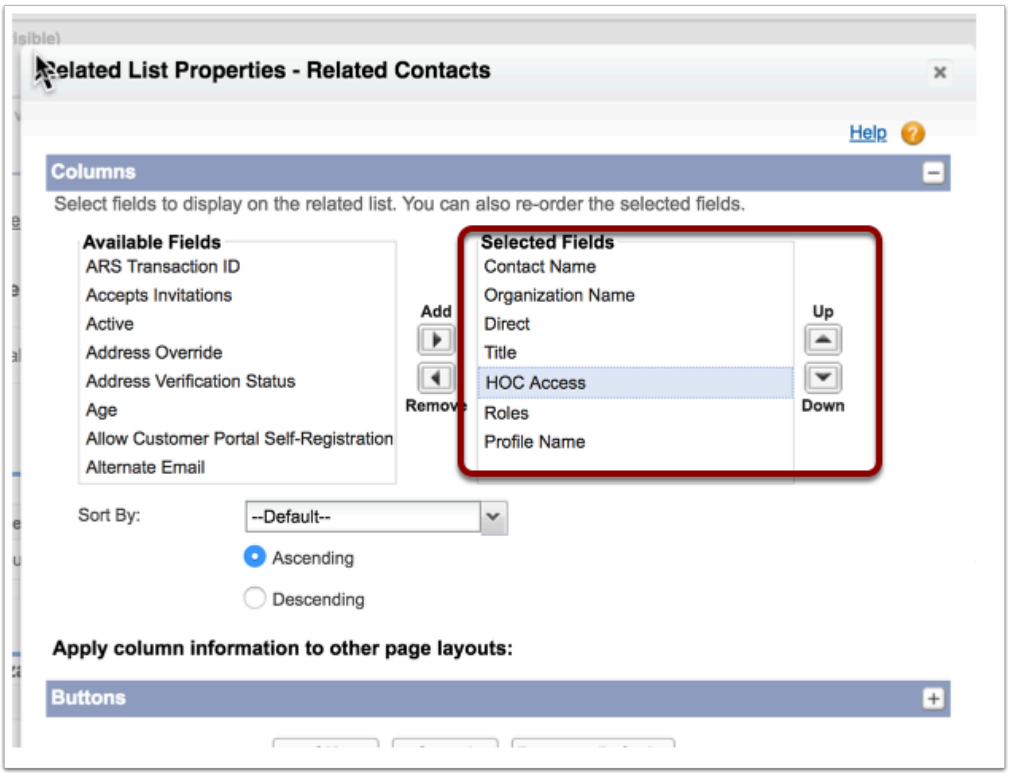
Setup / Account Contact Relationships / Page Layouts

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:



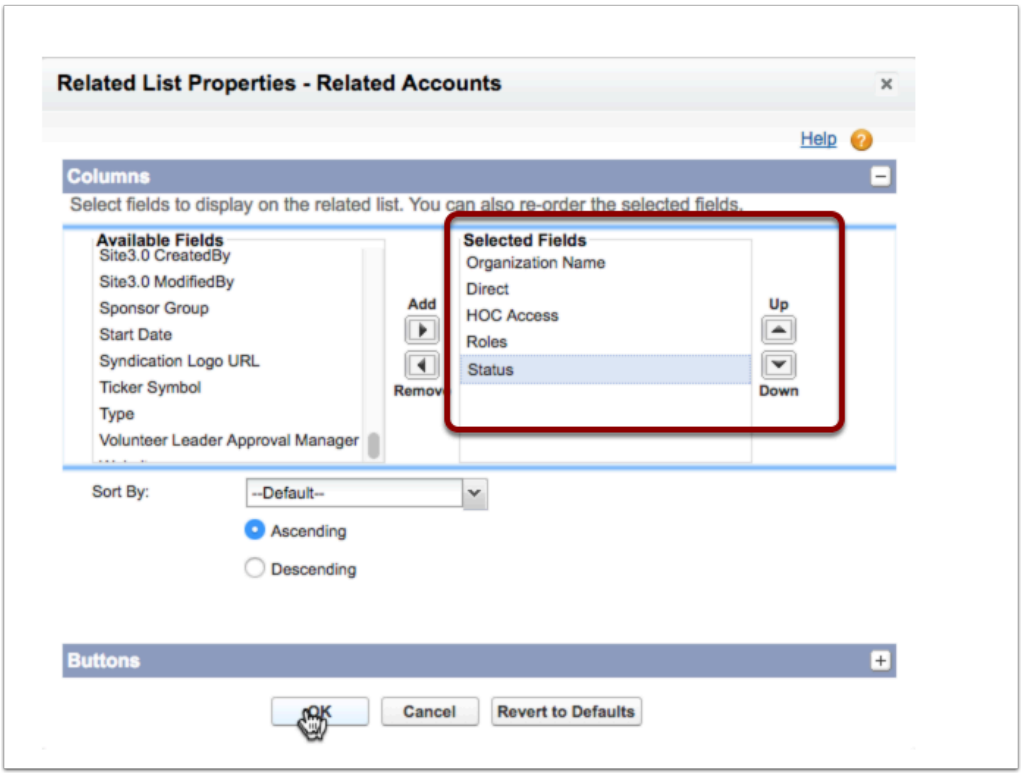
Note: The field "organization Name" might appear as "Account Name" in your instance of SF.

B. Remove the Contacts related list from the page layout

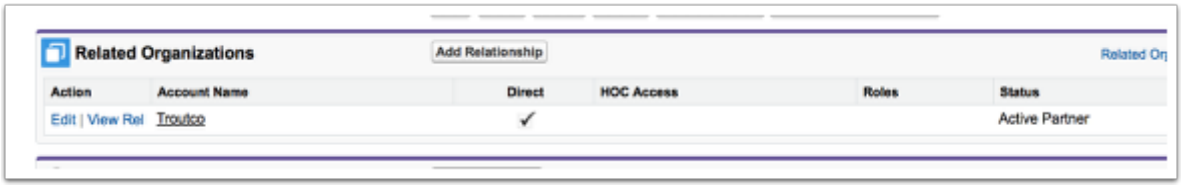
(it's no longer needed, as all your contacts for the organization will appear in the 'related contacts' list.

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:



Your related list will now look like this:



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

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".

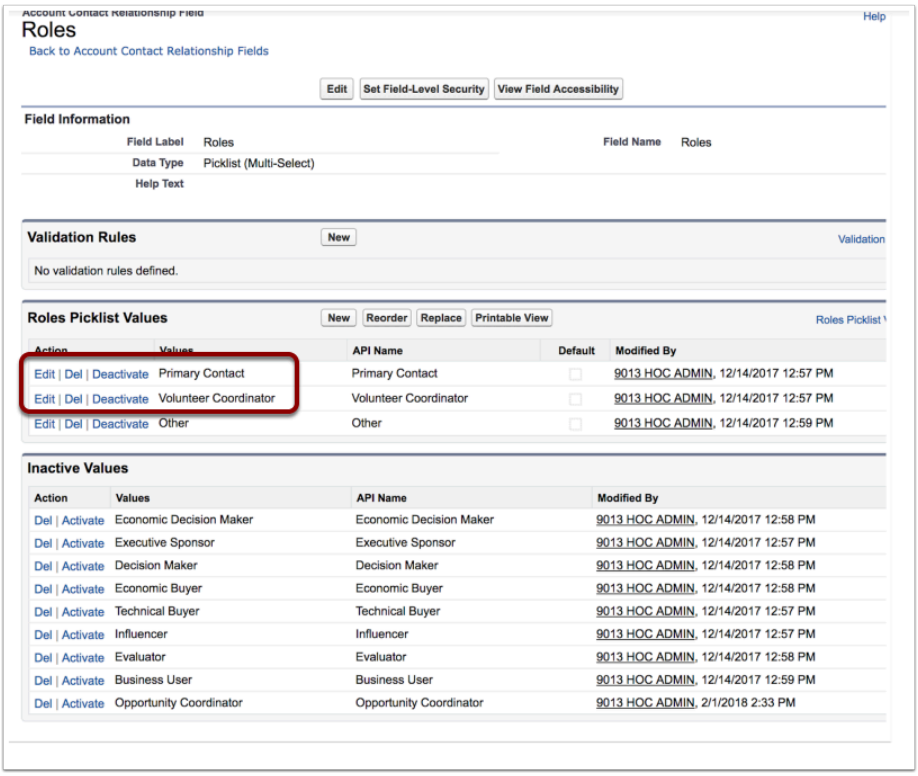
It has default picklist values used by the sales process, but not particularly useful for managing nonprofit organizations.

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)



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).

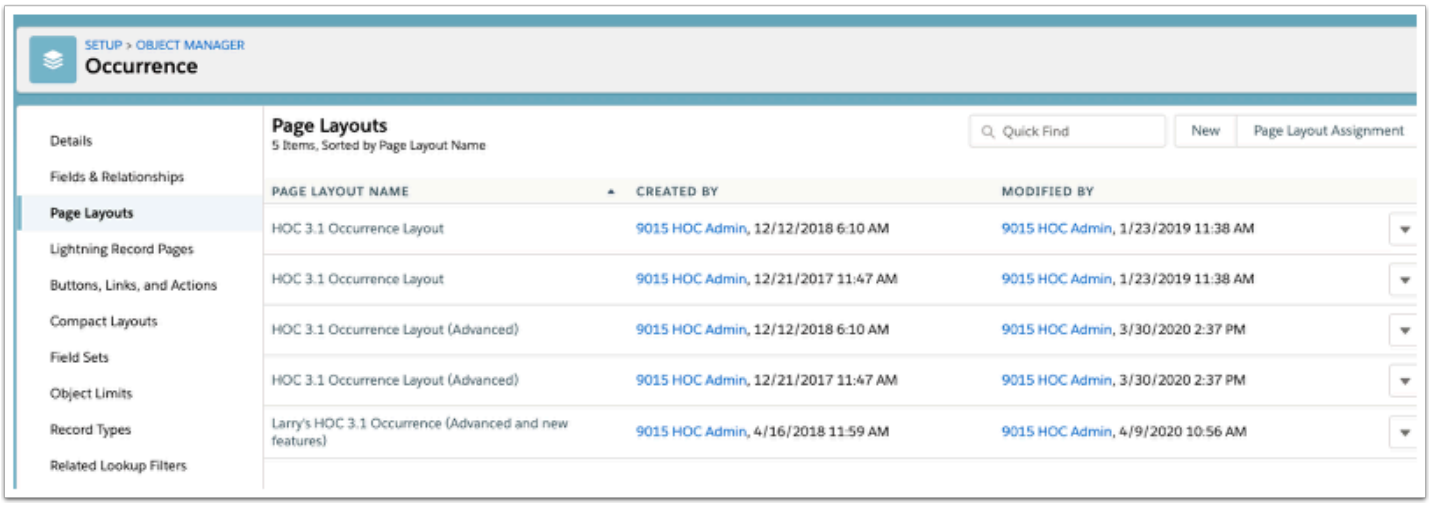
Update profiles to allow read and edit access to the fields you wish to make available

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

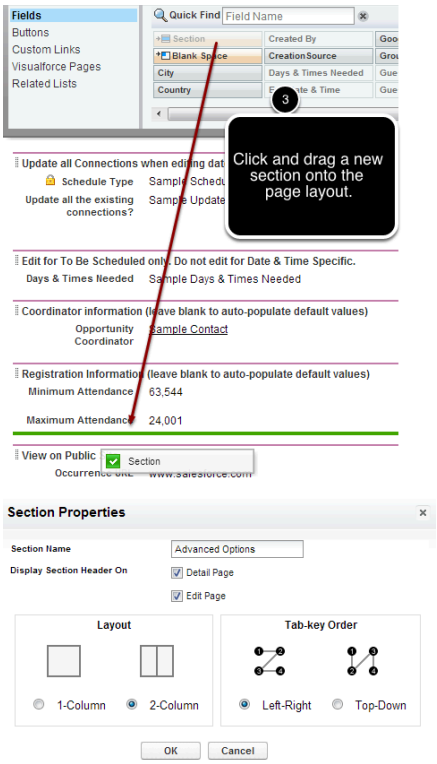
Select the occurrence page layout(s) you are using for System Admin and Staff,. You'll then want to add new fields to the page layout.



Click the arrow to the right and select 'edit' for the layout you wish to edit.

(If you're using HOC Lightning, you might be using the HOC 3.1 Occurrence Layout or the HOC 3.1 Occurrence Layout (Advanced)

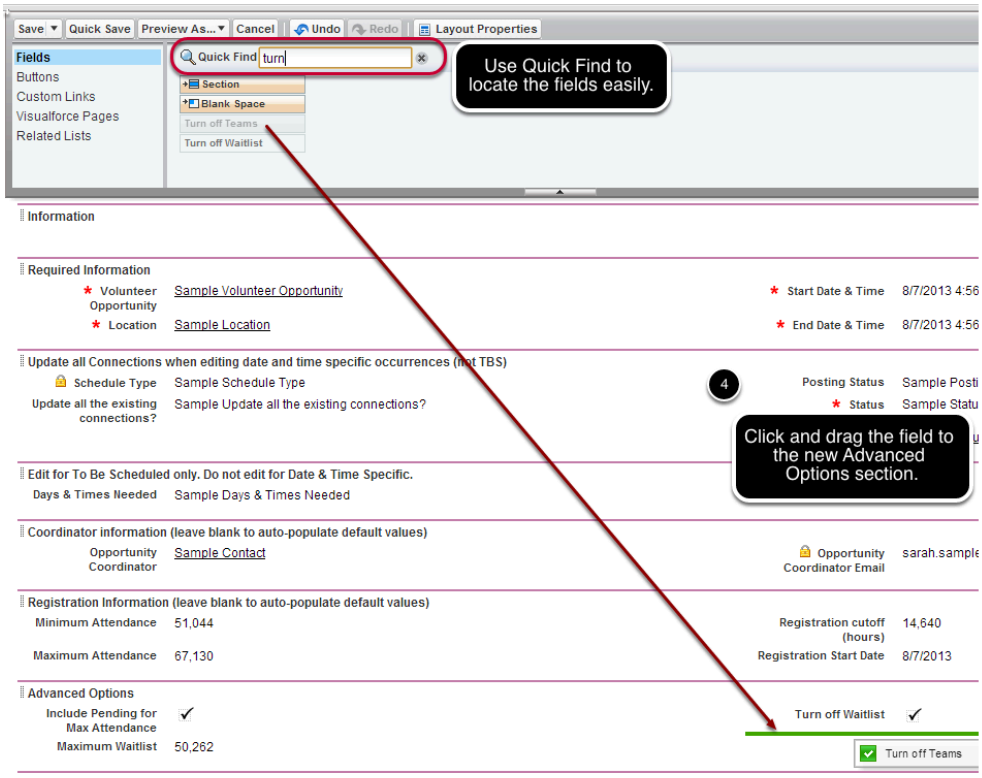
Add a new section (if the section isn't already there)



You can add the fields wherever you desire on the page layout you select; however, we recommend that you create a new section called "Advanced Options" that follows the

Registration Information section on the Occurrence Page Layout you are using if its not already there.

Add fields



Here's a suggested layout for this section which includes all the available 'advanced occurrence options" (as seen in lightning)

Extending Advanced Occurrence Options to the Volunteer Opportunity Page Layout

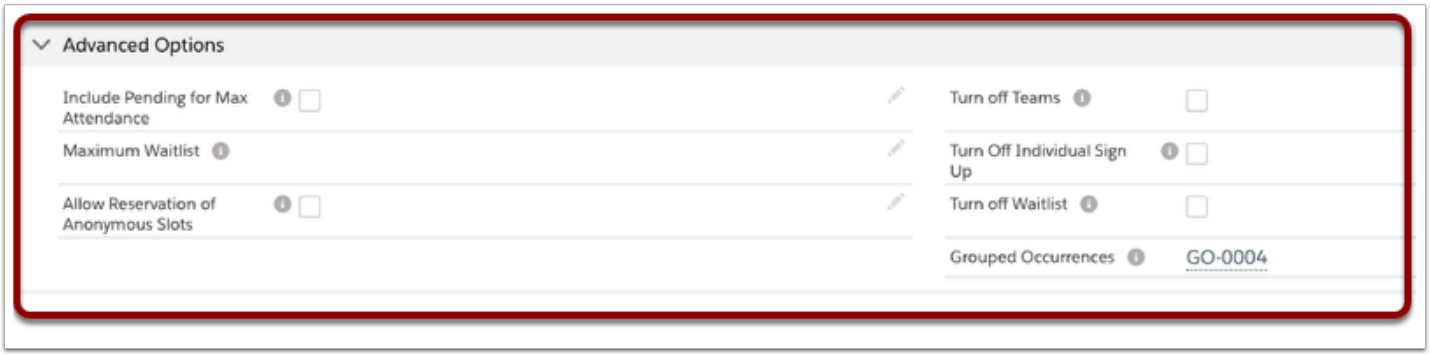
While often these 'advanced occurrence options' might be applied only to one or two occurrences, what if you want ALL occurrences of the opportunity to automatically 'turn off teams' or 'allow reservations of anonymous slots'? If you don't want to have to set these settings for each occurrence of an 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:



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

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

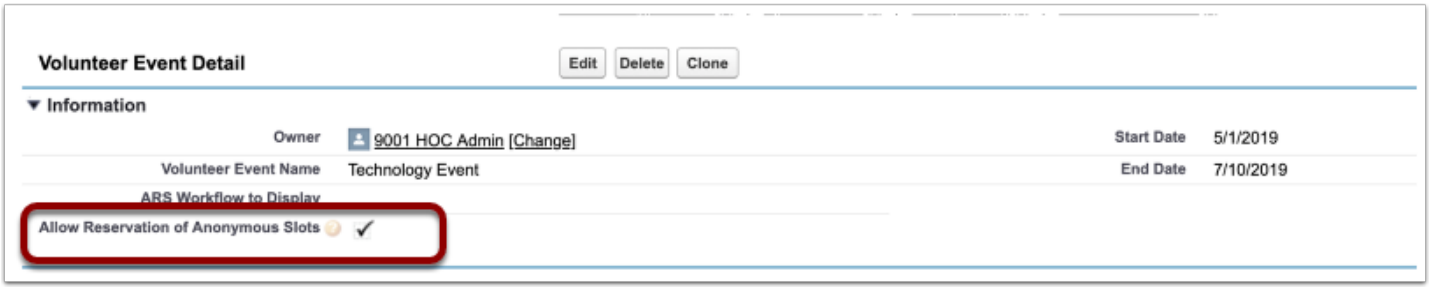
This optional feature allows team captains to reserve slots in occurrences of volunteer opportunities for 'unnamed team members' (in addition to their named team members.). It essentially allows a team captain to add 'guest volunteers' to their connection - thereby reserving space for team members they 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:

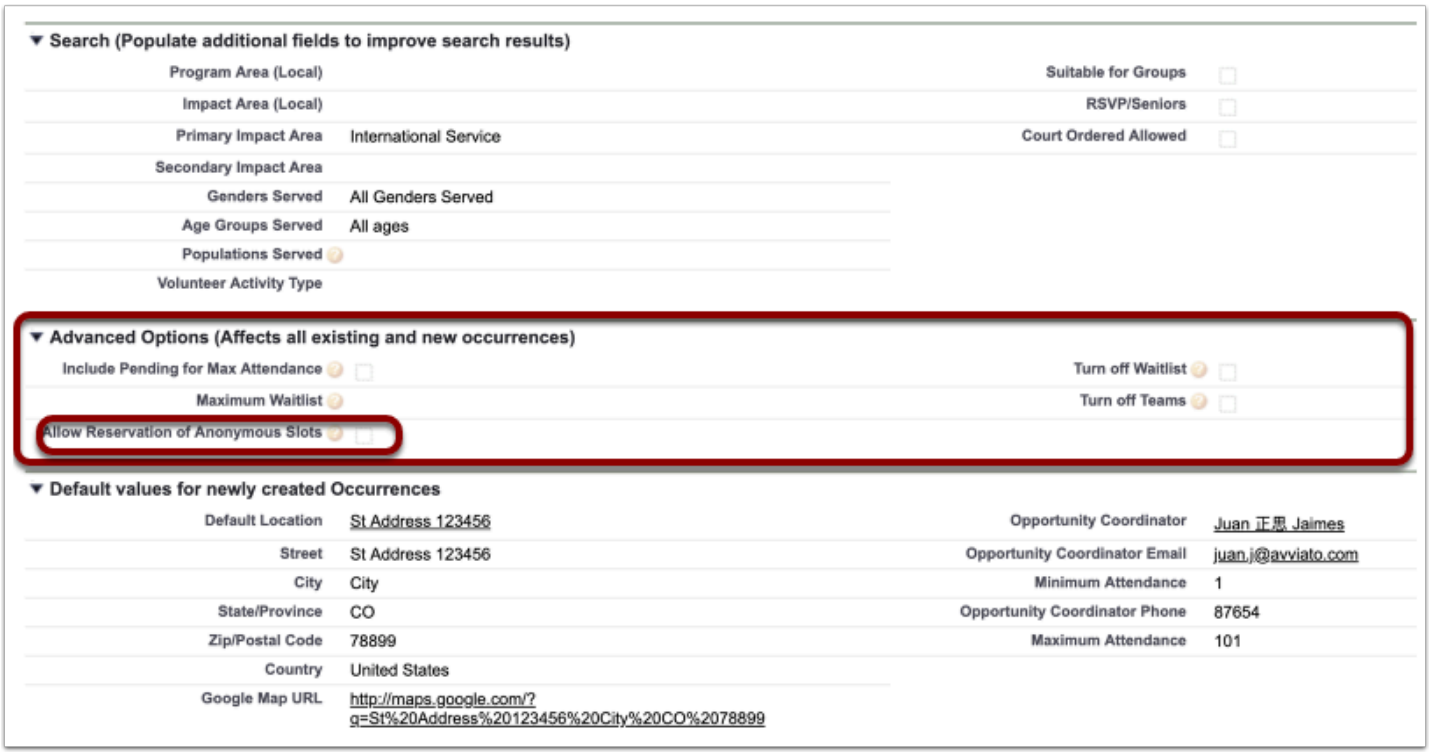
Add the field to the Volunteer Event Page Layout



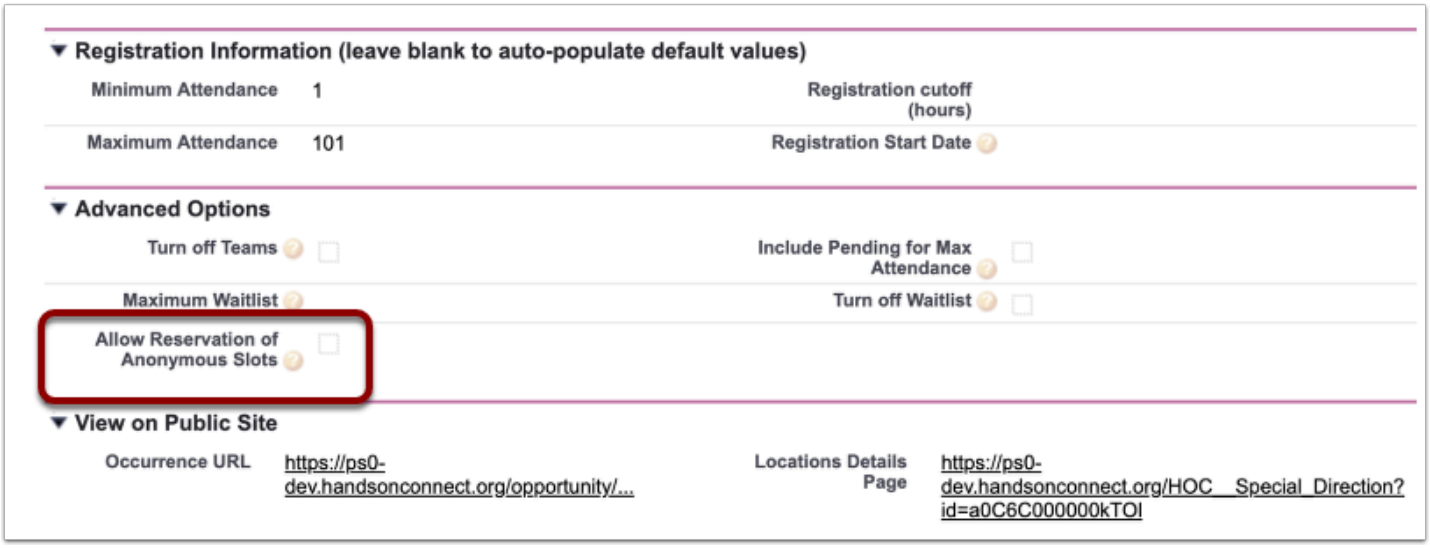
Add the field to the Volunteer Opportunity Page Layout

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).



Add the field to your occurrence page layout



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".

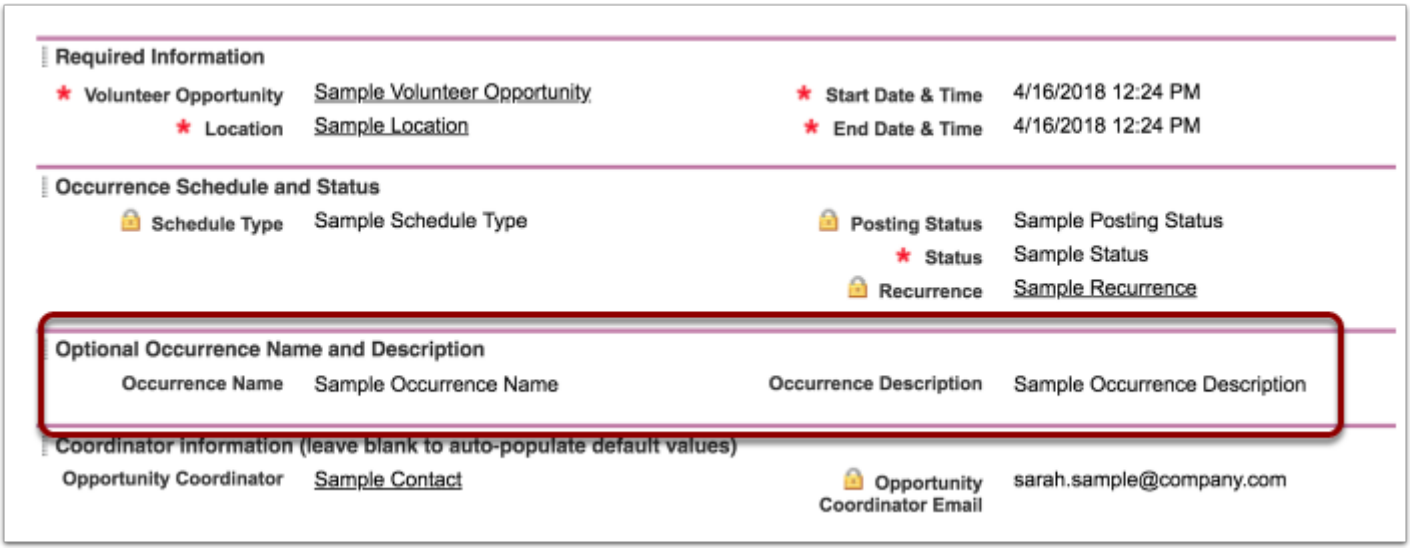
Give profiles permission to read and edit two new fields in the occurrence record

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

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

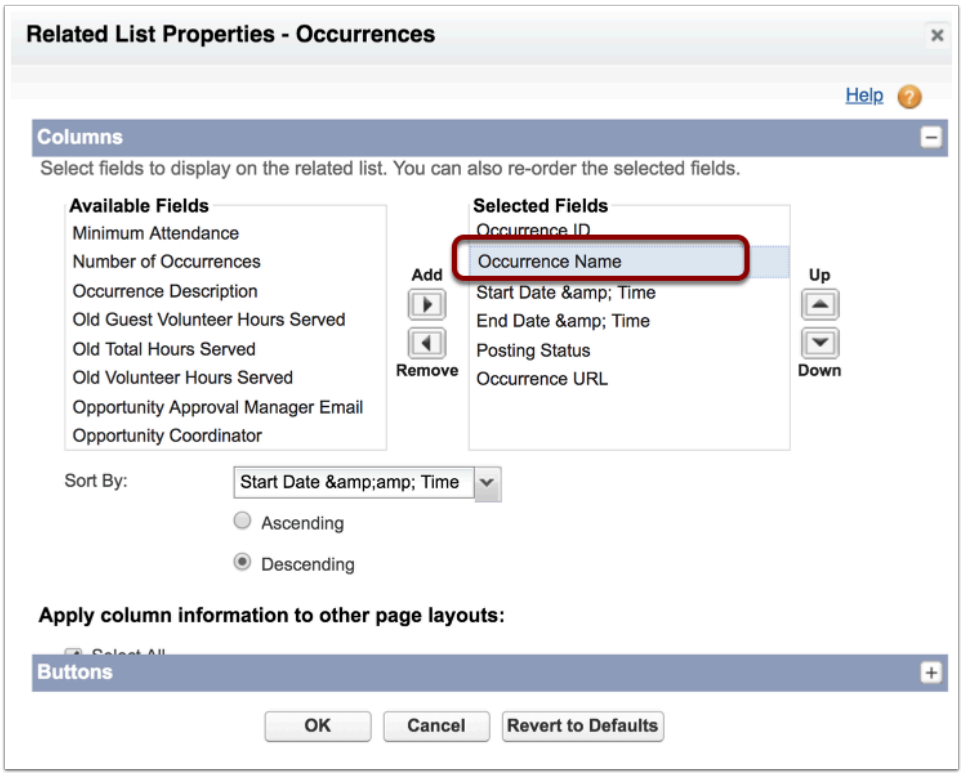
In this example, I've added a new 'section' to the page layout labeled "Optional Occurrence Name and Description". This makes it clearer for users that the use of an occurrence name and description is strictly optional. I've then added the two new fields to this section.



(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:



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

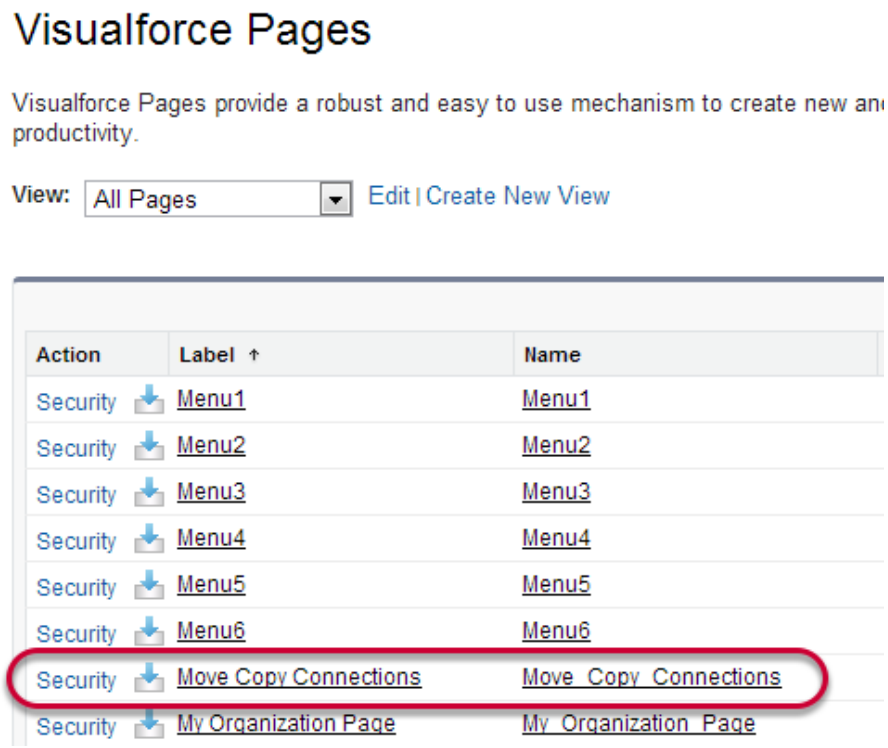
This article details the steps taken by System Admins to enable the Move/Copy Connections.

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

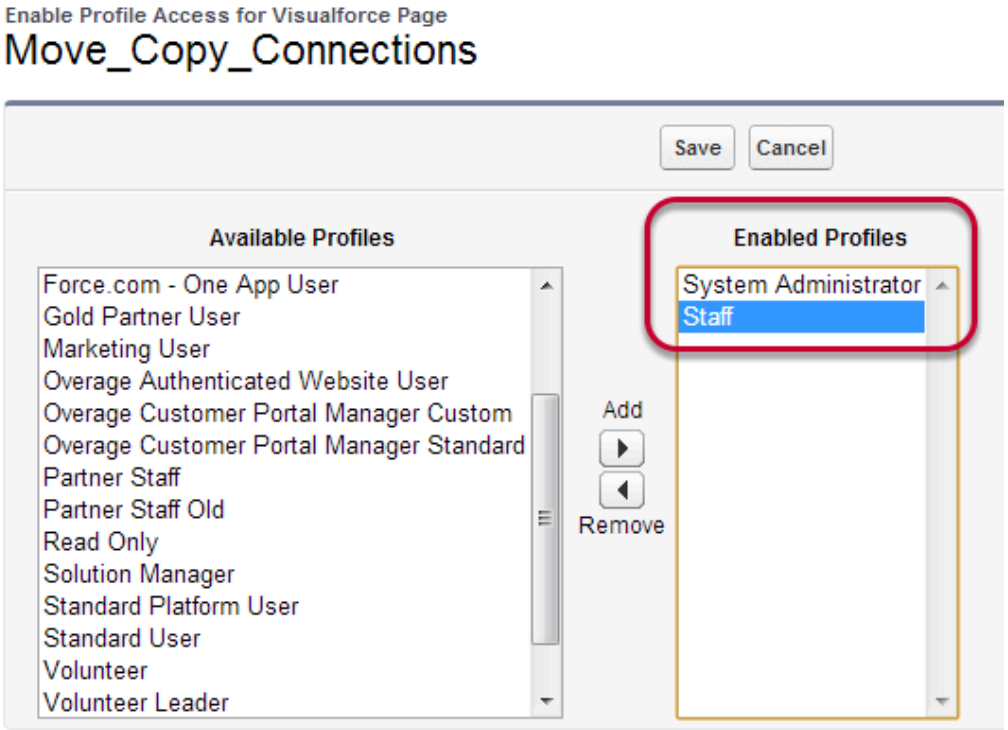
The visualforce page associated with the Move/Copy Connection are already enabled for System Admins. If you wish to enable them for Staff or other profiles, follow these steps.



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

Locate the Move_Copy_Connections page.

Click on Security next to Move_Copy_Connections



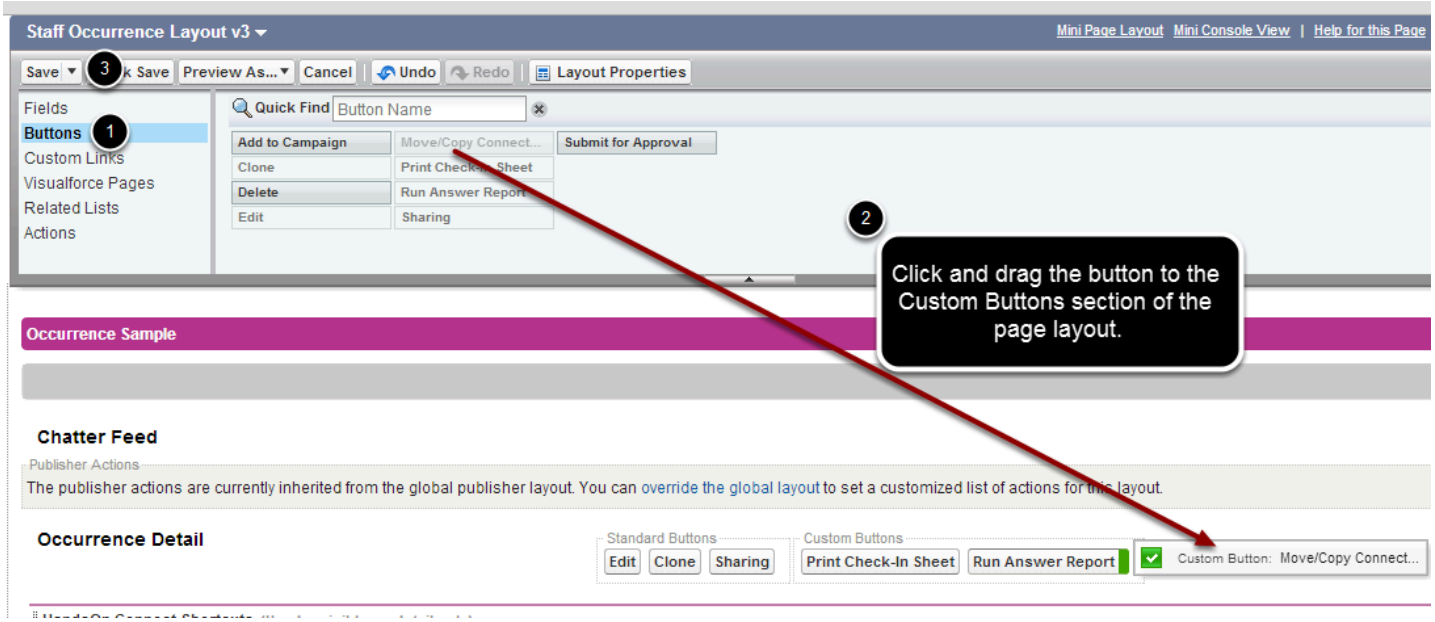
Select the Available Profile desired and add them to the Enabled Profiles column.

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.



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.

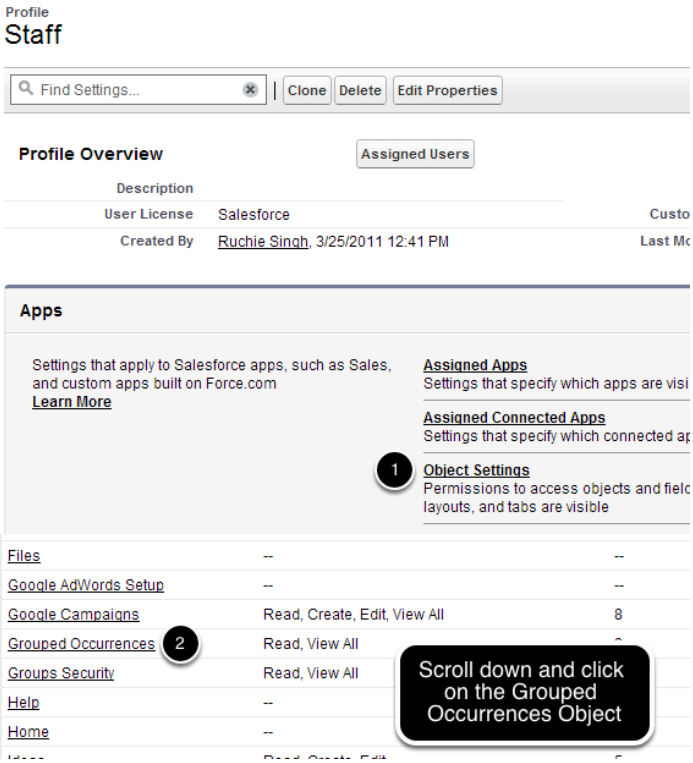
NOTE: While the ability to group occurrences makes it easier for volunteers to sign up for a series, there are business practices to be considered . System Admins should only enable these features for trained users. It is not recommended that you enable this feature for Partner Staff. If desired you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

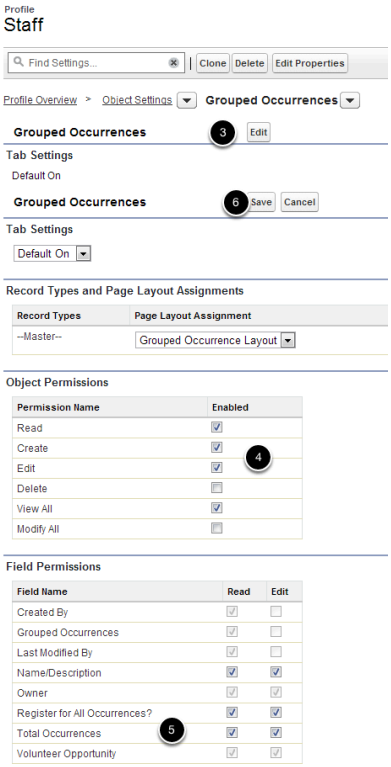
To learn more about permission sets, see this Salesforce post

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.





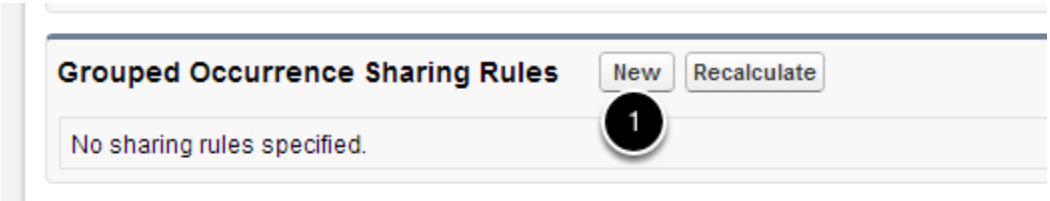
It is recommended that you grant Create and Edit access to staff and other profiles. I you want to allow Staff users to edit grouped occurrences created by other users, then you'll need to either create a sharing rule (see below) or select the Delete and Modify All options for the profile.

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.

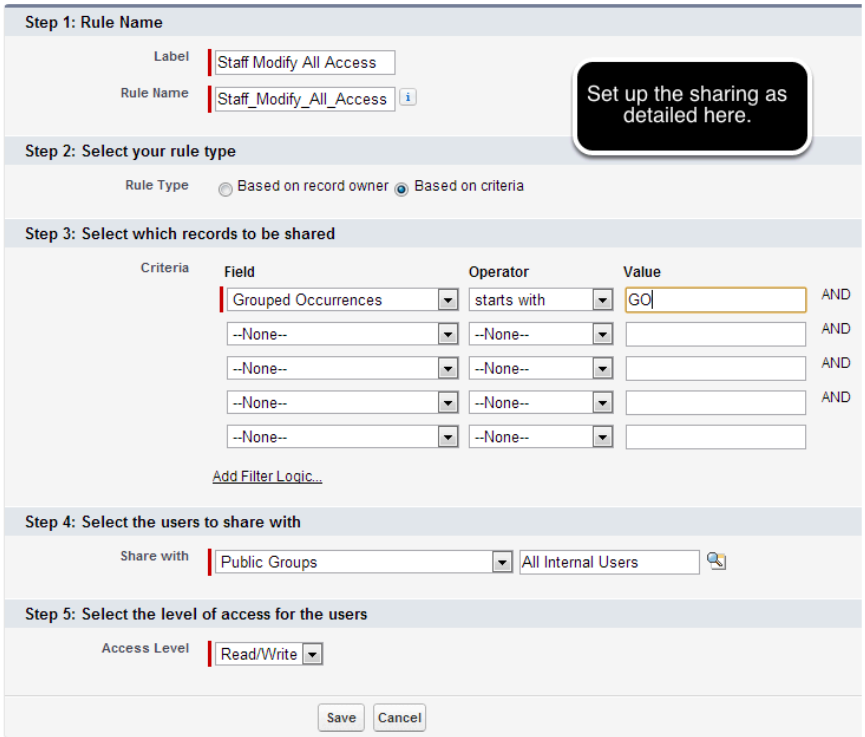
Repeat for all profiles that you wish to enable the functionality for.

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)



Go to Setup -> Security Controls -> Sharing Settings

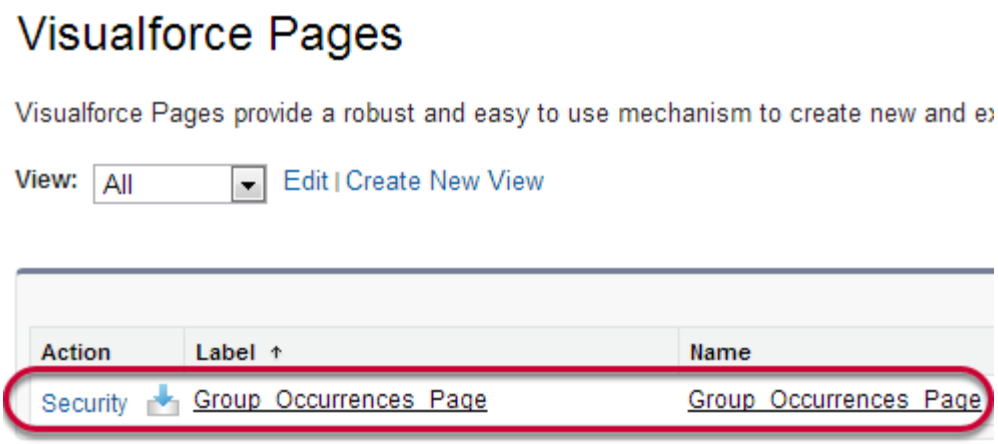
Scroll down to Grouped Occurrence Sharing Rules and click New



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

Granting Permission to the Visualforce Pages

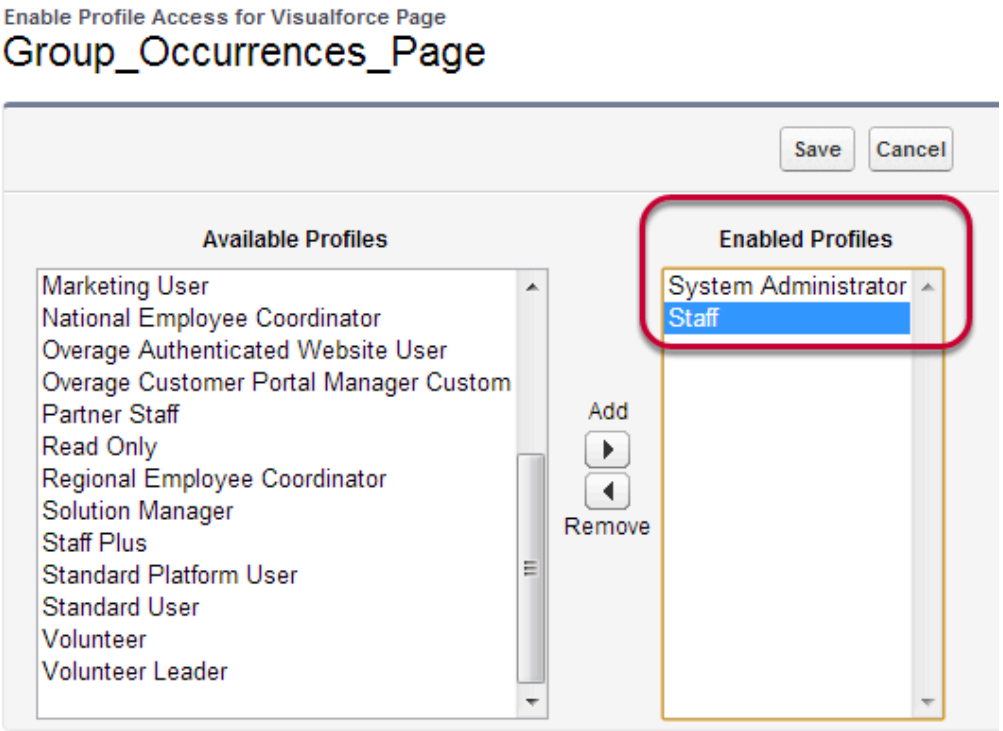
The visualforce page associated with the Grouped Occurrences are already enabled for System Admins. If you wish to enable them for Staff or other profiles, follow these steps.



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

Locate the Group_Occurrences_Page page.

Click on Security next to Group_Occurrences_Page



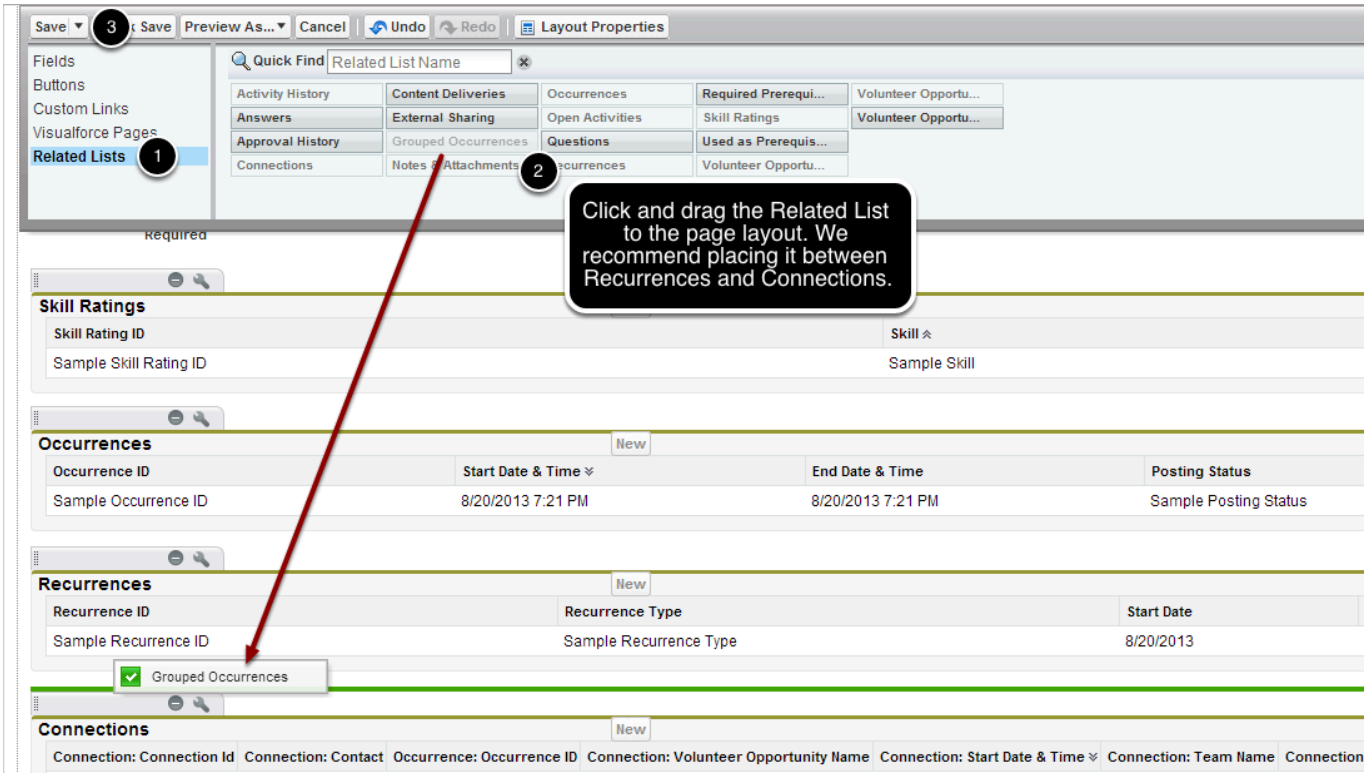
Select the Available Profile desired and add them to the Enabled Profiles column.

Click Save.

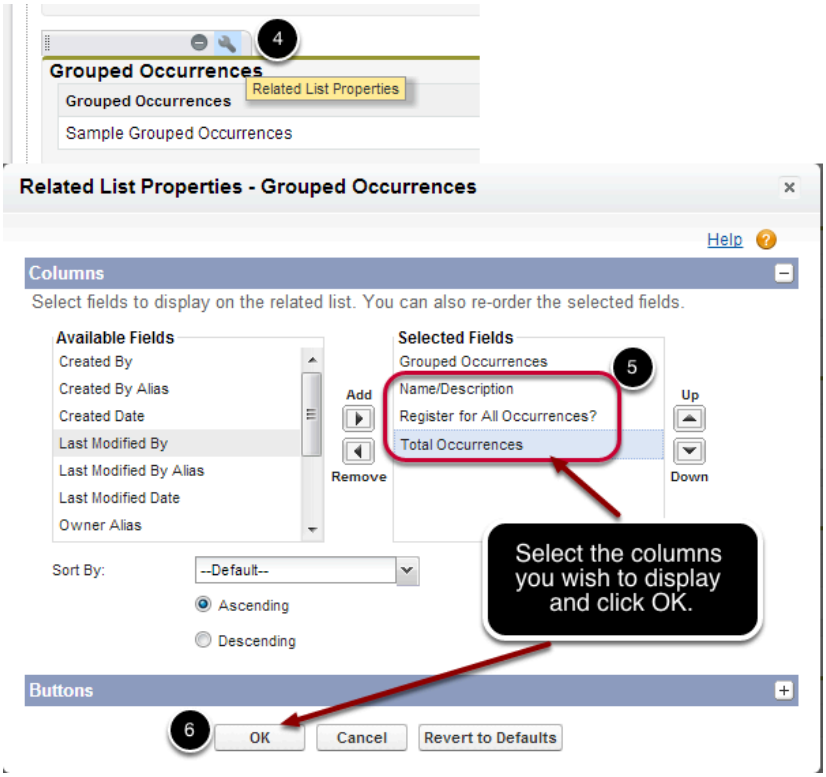
Adding the Related List to Volunteer Opportunity Page Layout

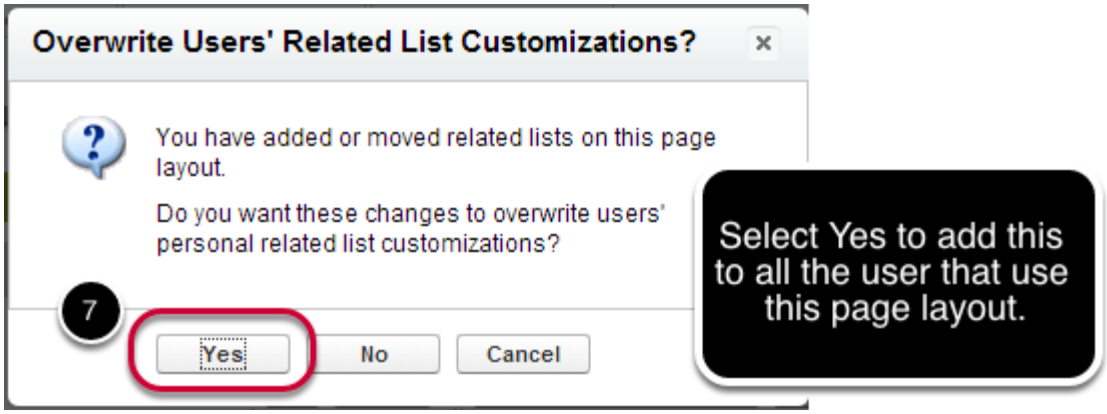
Go to Setup -> Create -> Objects -> select Volunteer Opportunity.

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.



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

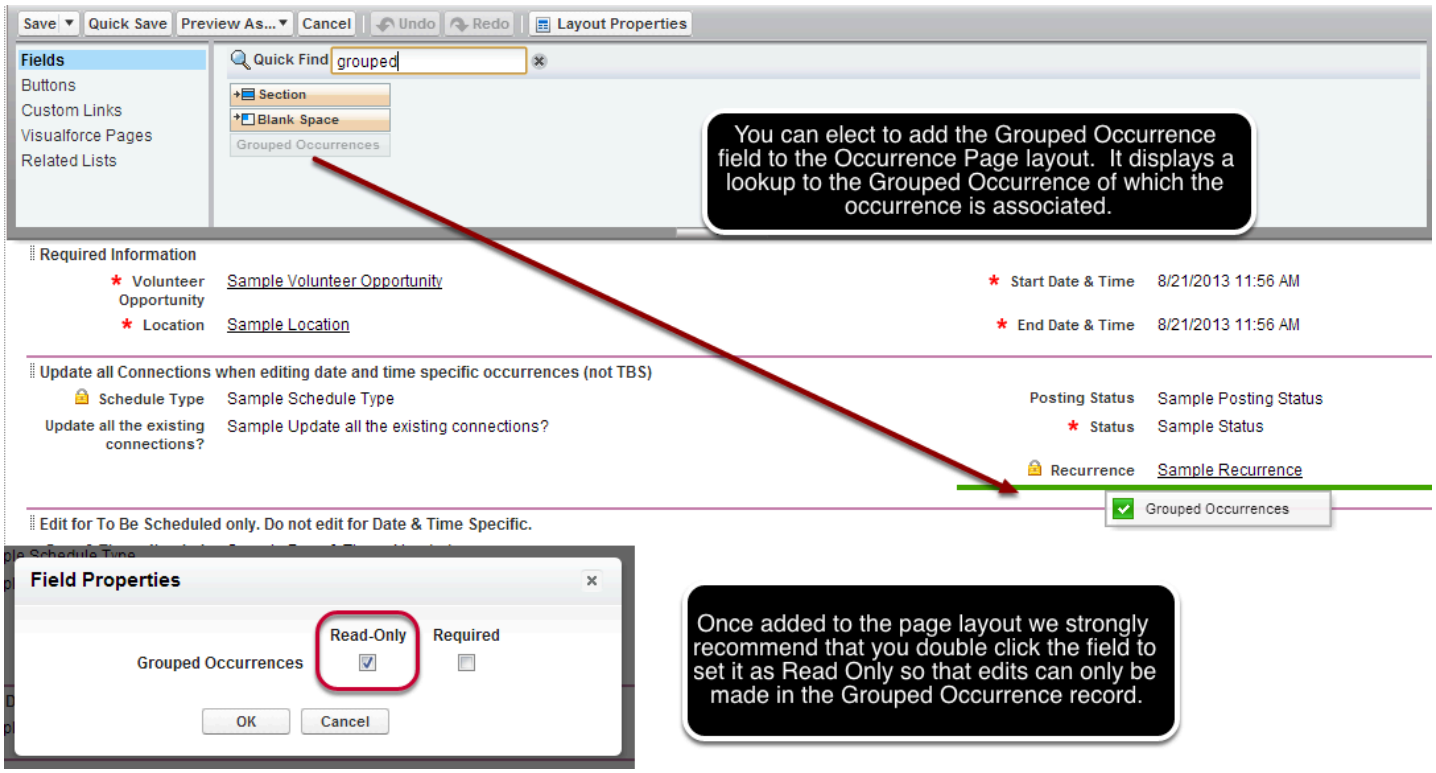




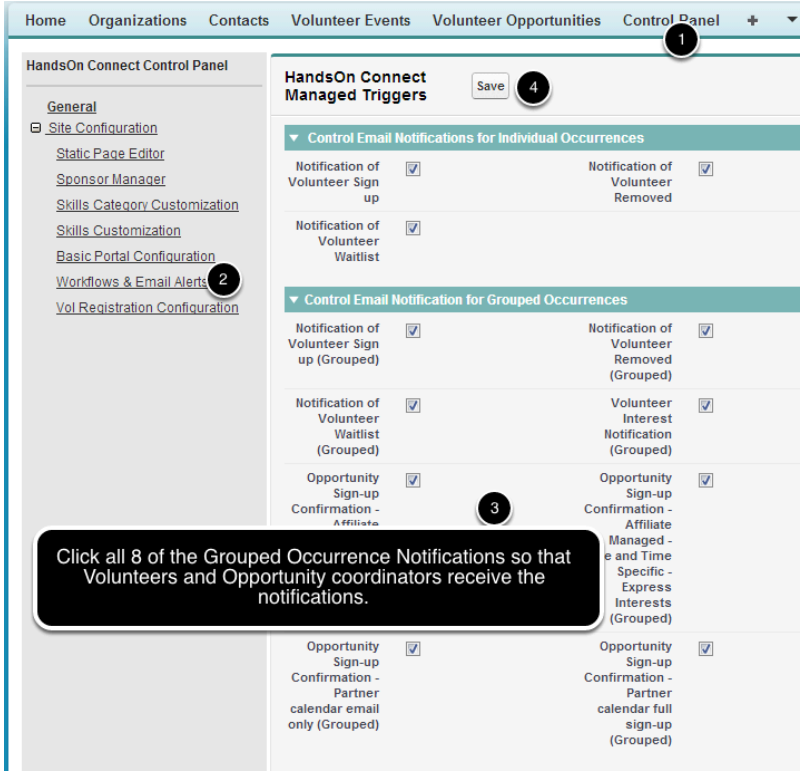
Repeat for any additional page layouts as desired.

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



Enabling the Notification Triggers



Enabling Prerequisites

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

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.

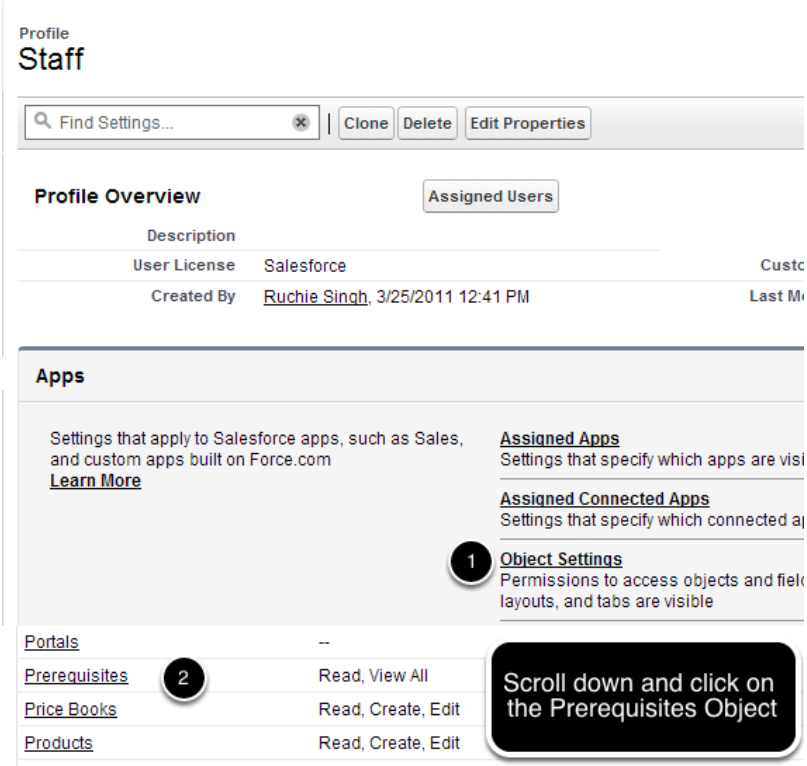
To learn more about permission sets, see this Salesforce post

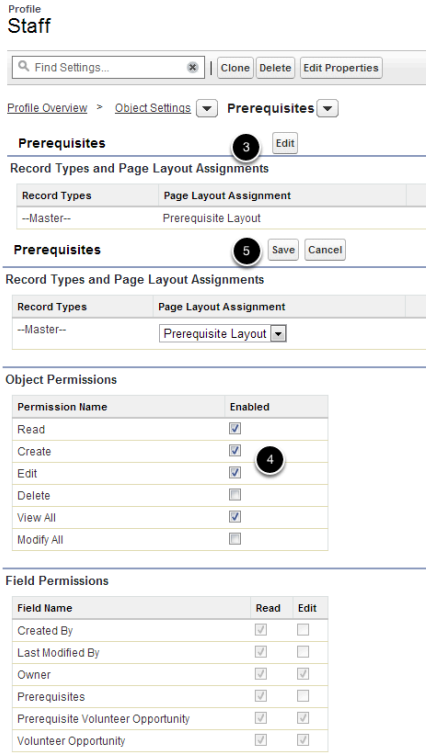
Enabling Profile Access

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.





It is recommended that you grant Create and Edit access to staff and other profiles. I 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.

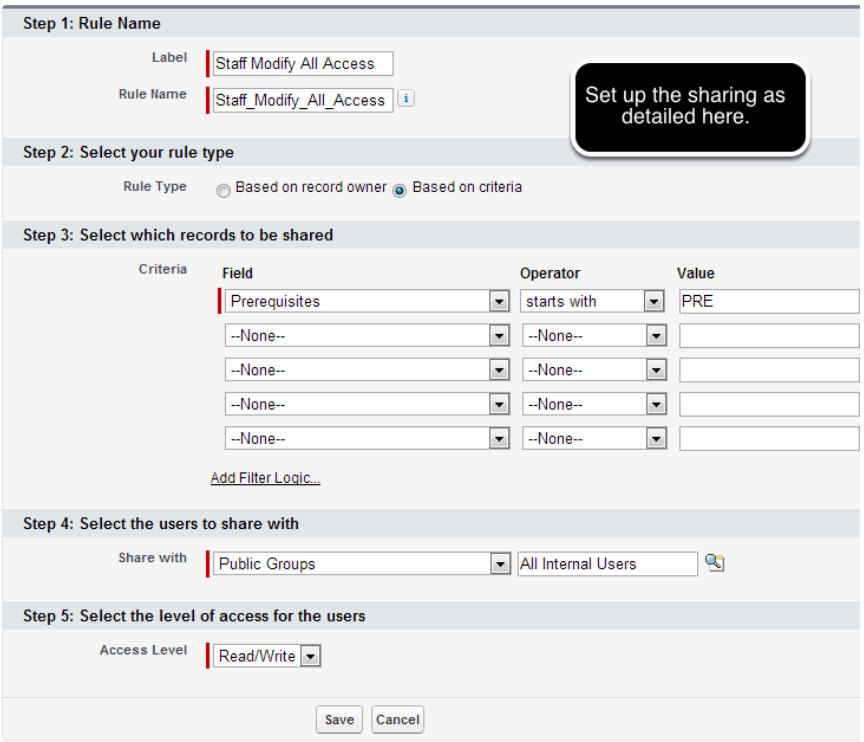
Once you have updated the object permissions, click Save.

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)

Go to Setup -> Security Controls -> Sharing Settings

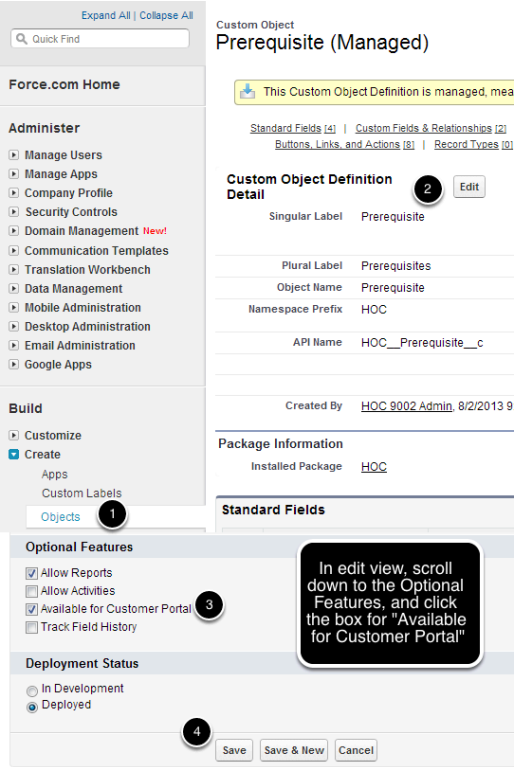
Scroll down to Prerequisite Sharing Rules and click New



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

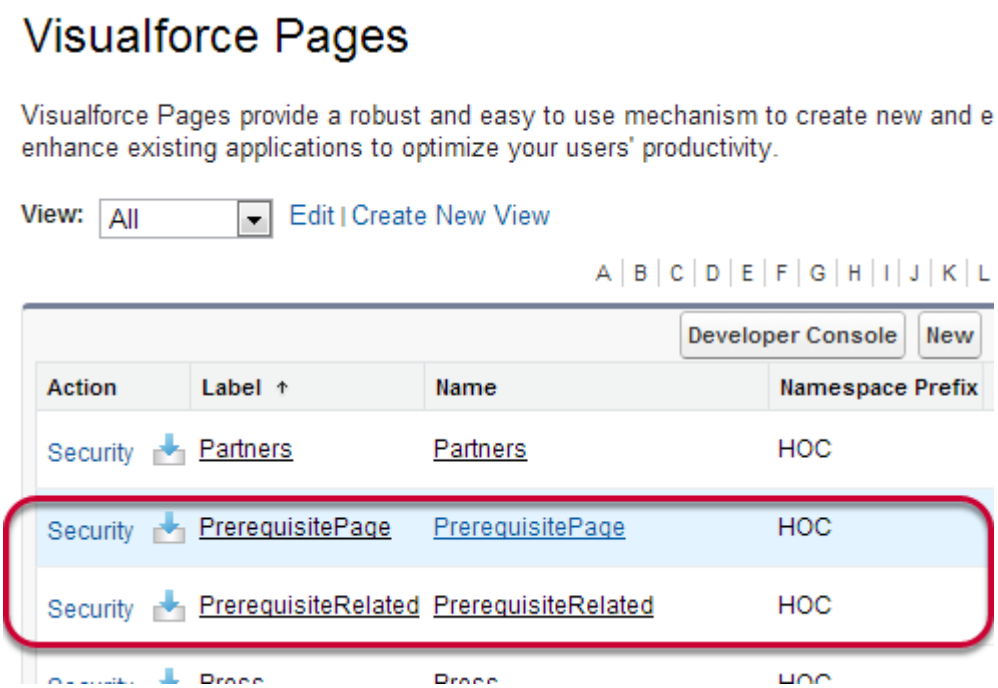
Granting Access to the Customer Portal (Only needed if enabling for Partner Staff in HOC 2.0

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.



Granting Permission to the Visualforce Pages

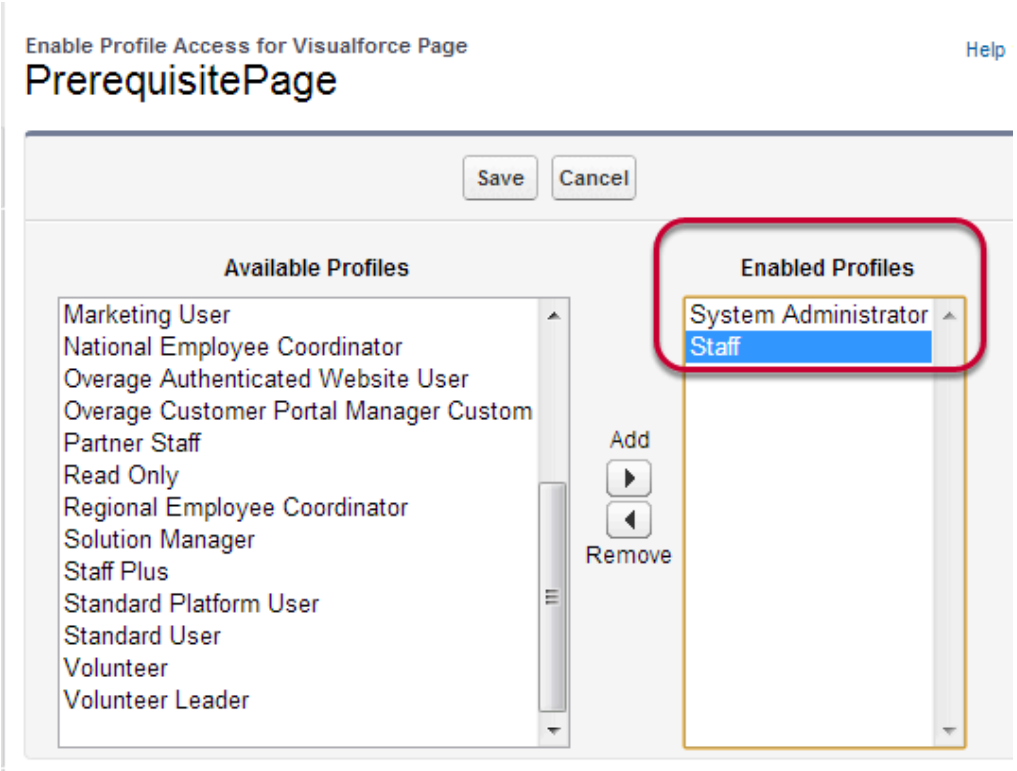
The visualforce page associated with the Prerequites are already enabled for System Admins. If you wish to enable them for Staff or other profiles, follow these steps.



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

Locate the PrerequistePage page.

Click on Security next to PrerequisitePage



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

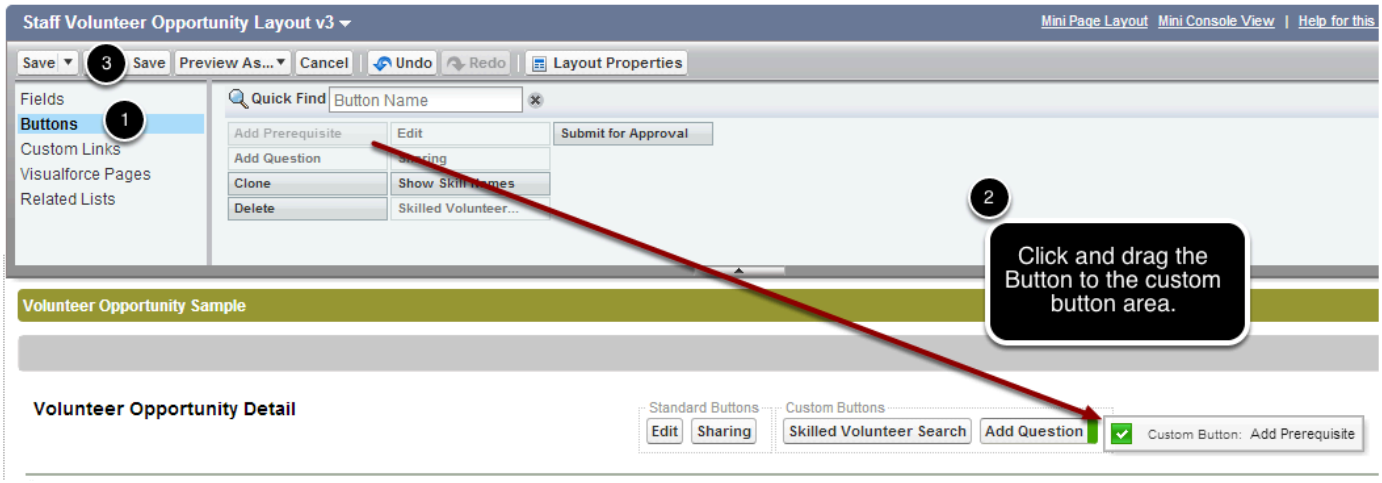
Click Save.

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.



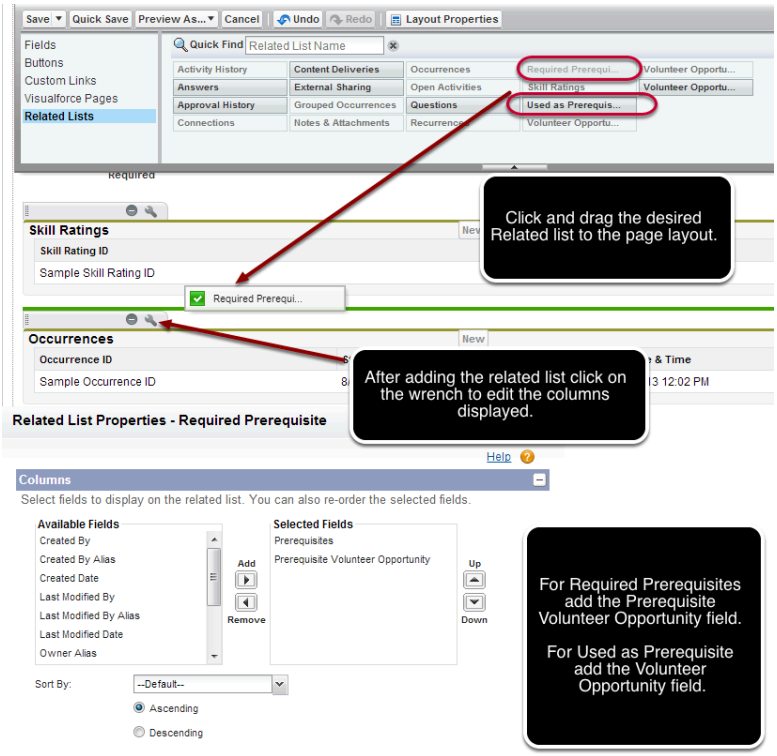
Adding Prerequisite Related List to the Volunteer Opportunity Page Layout

There are two related lists available for the Prerequistes

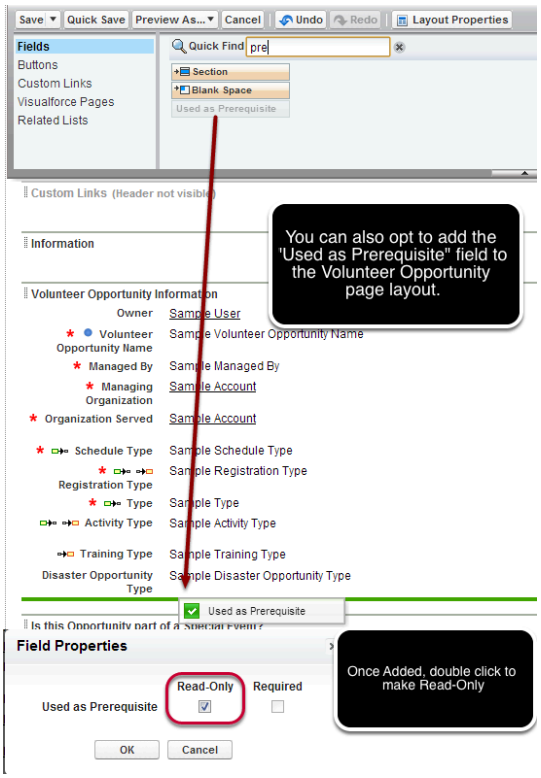
Required Prerequisites - This will list the prerequisite associated with the volunteer opportunity record.

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.



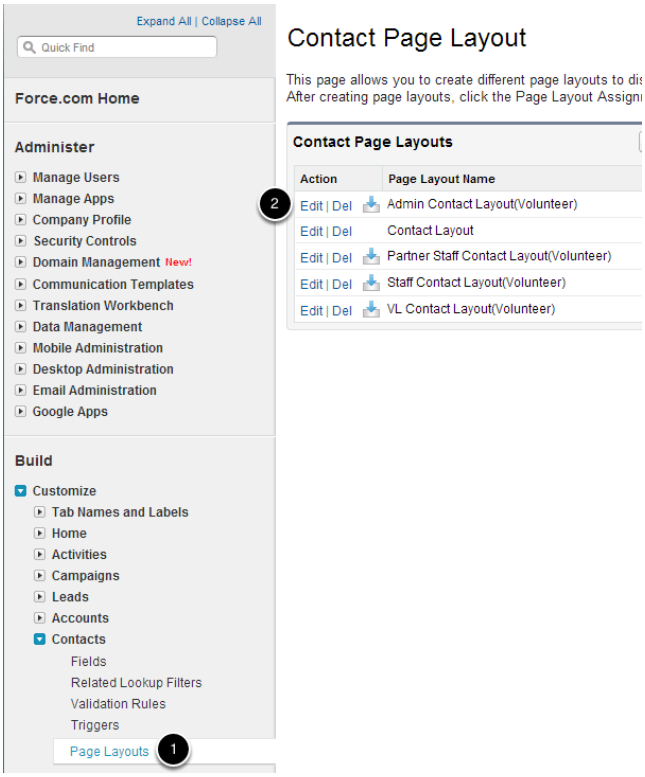
Adding "Used as Prerequisite" checkbox field to Volunteer Opportunity Page Layout



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.

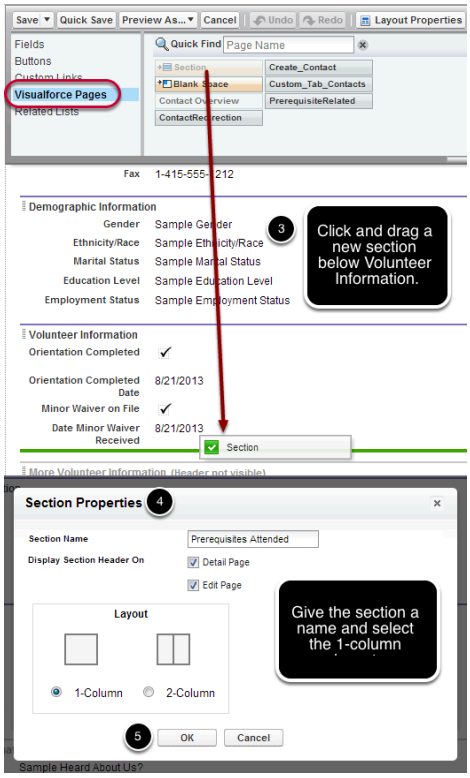
NOTE: Because System Administrators are able to override 'read only' instructions on page layouts - please go into the System Administrator Profile and change the field level permission for the volunteer opportunity object's field "Used as Prerequisite" to VIEW (but not edit). This will prevent a system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

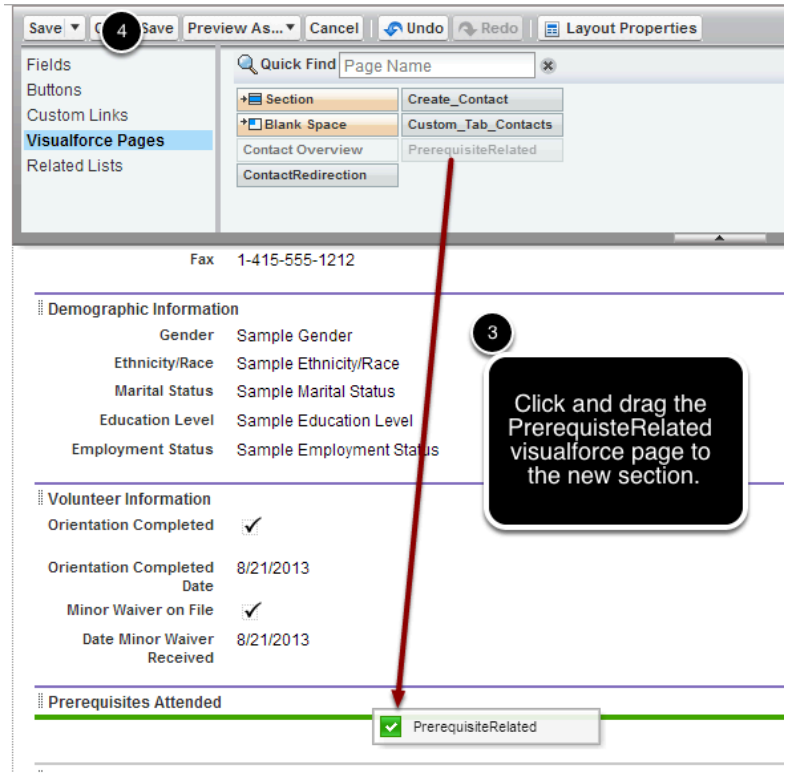
Adding PrerequisiteRelated to the Contact page layout



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 PrerequisteRelated 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 send 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 its 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

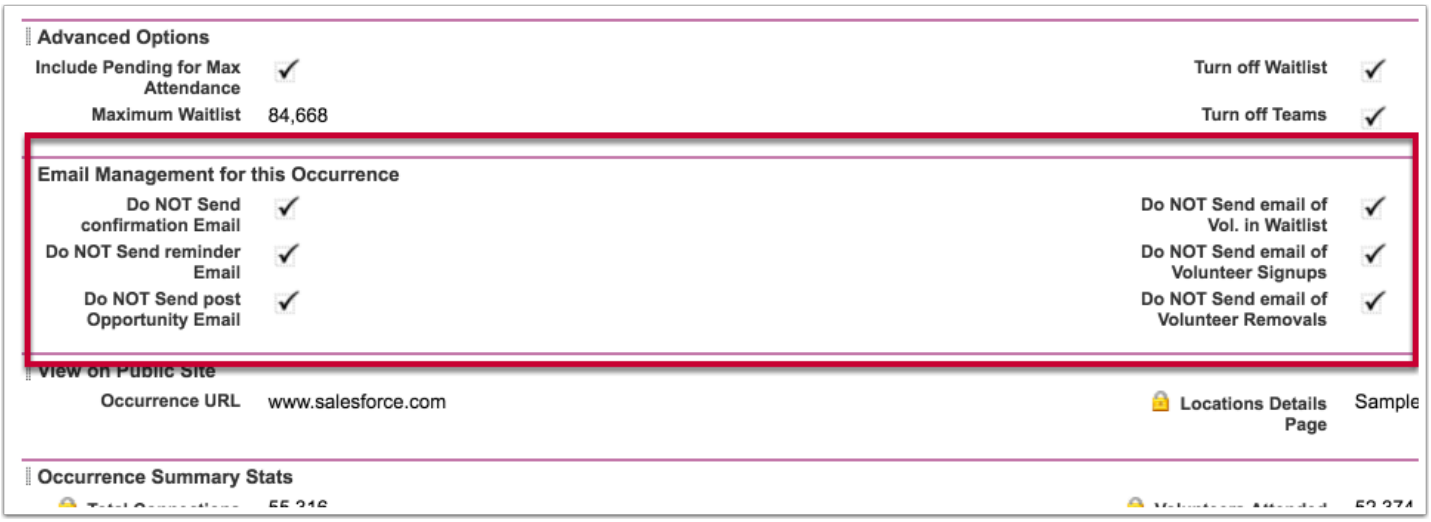
Go to setup / Objects / Occurrences / Page Layouts and click on 'edit' for Staff Occurrence Layout v3. (For the purposes of this tutorial, we'll assume your system admin and staff are both using the latest occurrence page layout, which is Staff Occurrence Layout v3.)

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



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 - Affilliate 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 Confirmatiion - 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

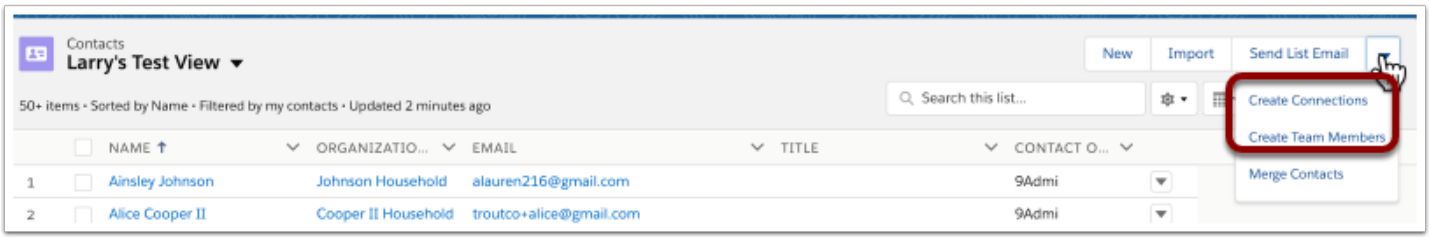
This article details the steps taken by System Admins to enable the Batch Create Functionality for Team Members and Connections.

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

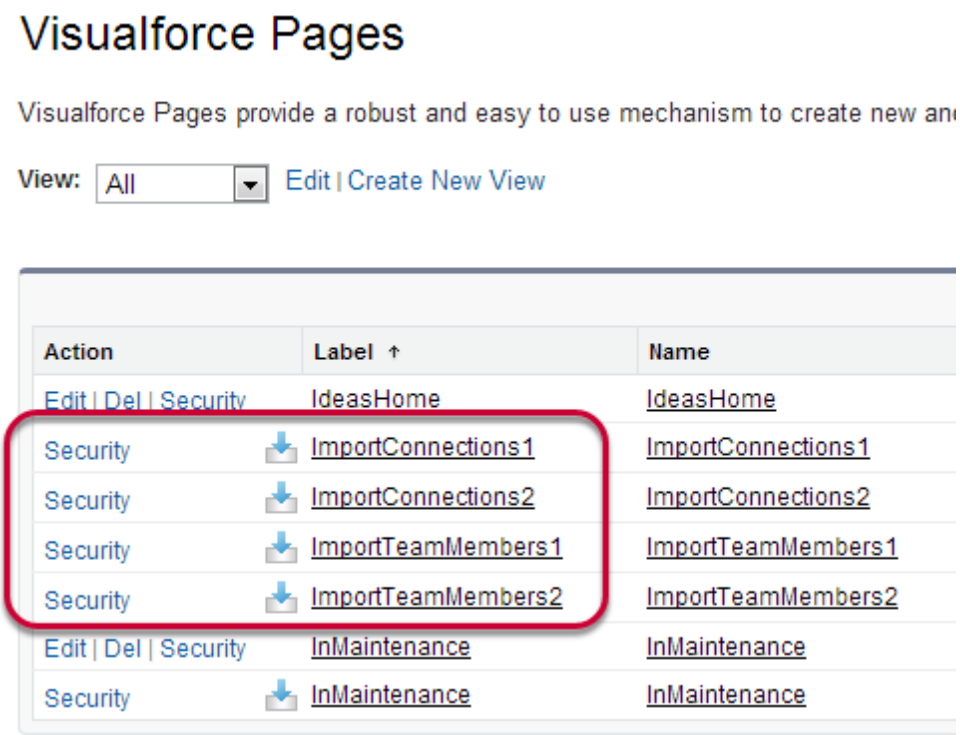
Note: If using HandsOn Connect Lightning - this functionality is already available and configured for access on the Utility Bar found at the bottom of the browser window and in Contact List Views by selecting the quick action via the triangle drop down on the upper right of all list views other than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

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



Granting Permission to the Visualforce Pages.

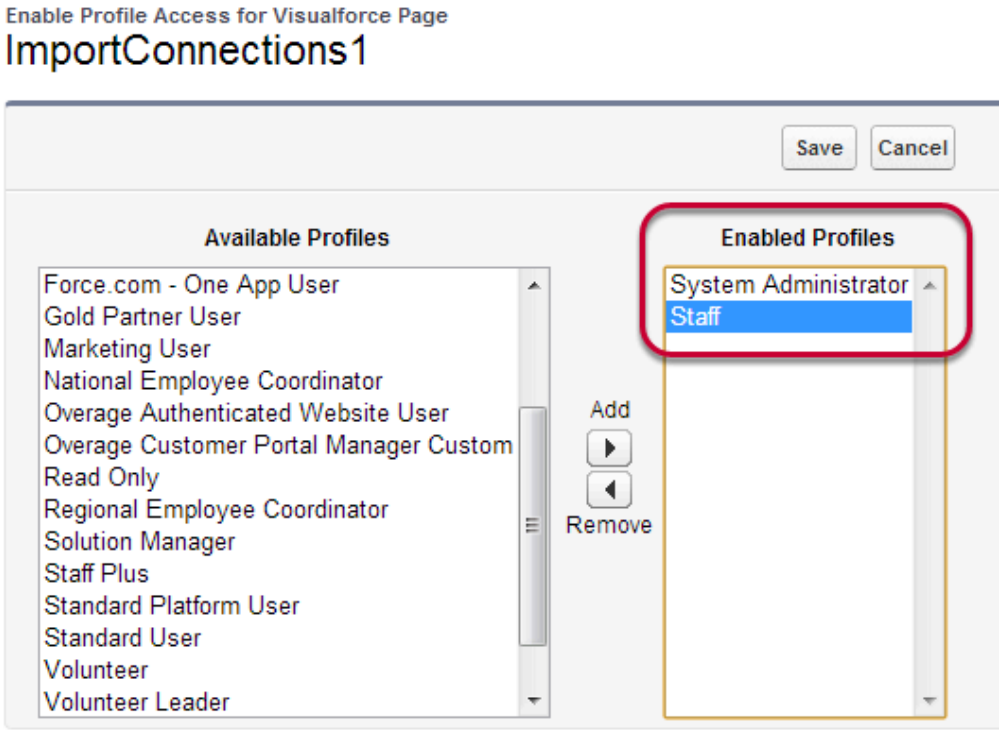
The visualforce pages associated with the Import Team Members and Import Connections are already enabled for System Admins. If you wish to enable them for Staff or other profiles, follow these steps.



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

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

Click on Security next to ImportConnections1



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

Click Save.

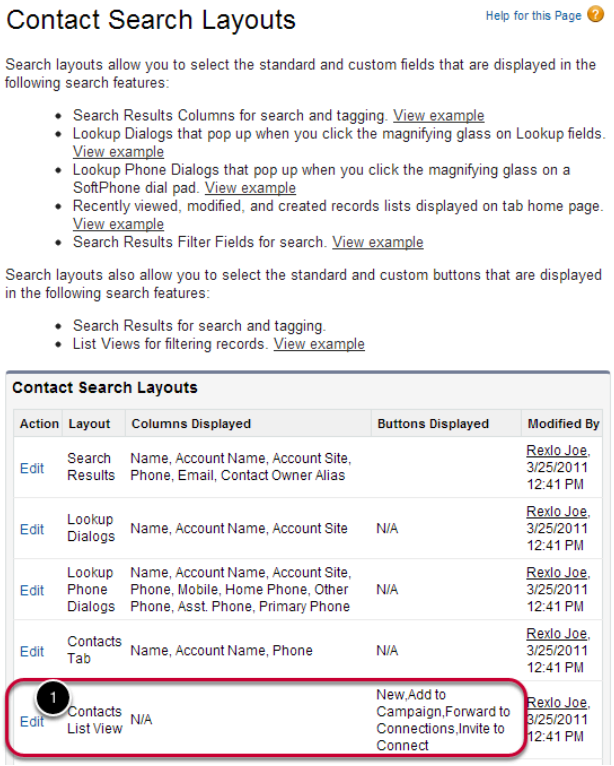
Repeat the steps for ImportConnections2, ImportTeamMembers1, and ImportTeamMembers2.

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.

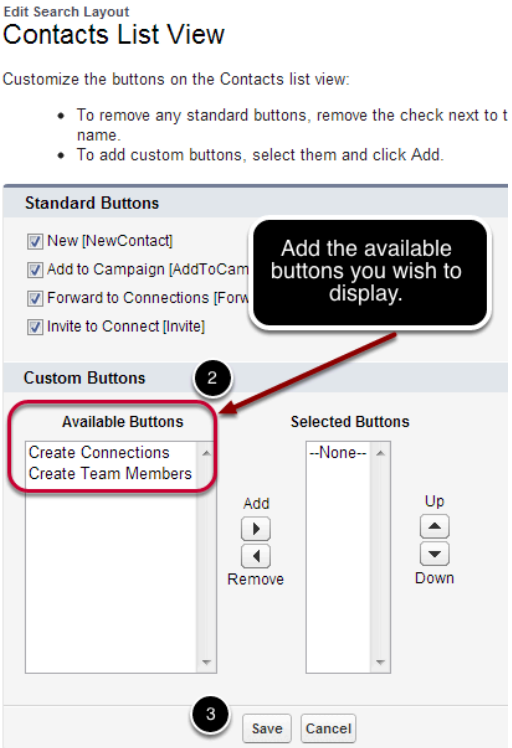
While the Contacts tab is hidden by default for the Partner Staff portal, if you have enabled it for them they will have access to these buttons as well.

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



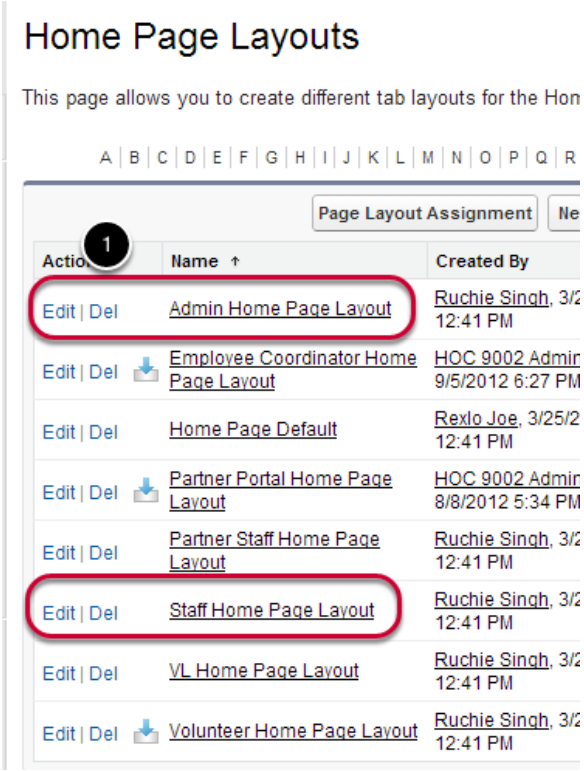
Go to Setup -> Customize -> Contacts -> Search Layouts

Click Edit next to Contacts List View



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

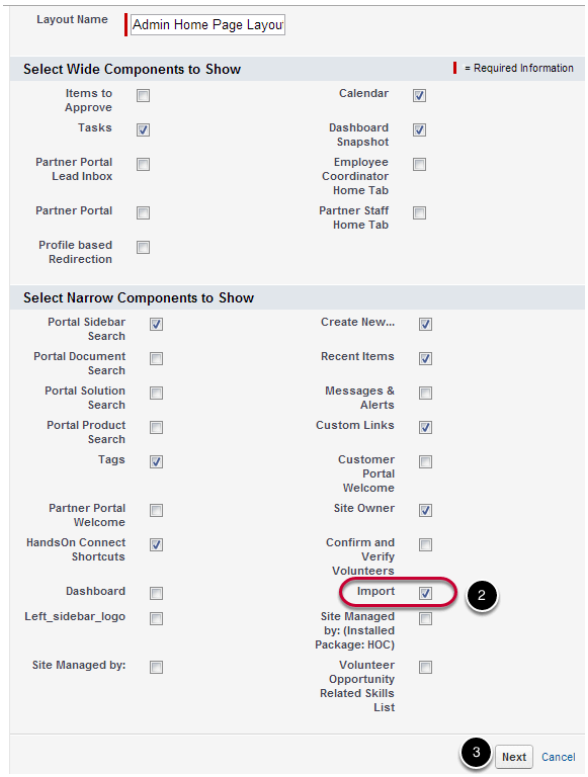
Unlike the Contact List View buttons, the Import menu can be added to the Left Side Menu based on the Home Page layout assigned to the profile.

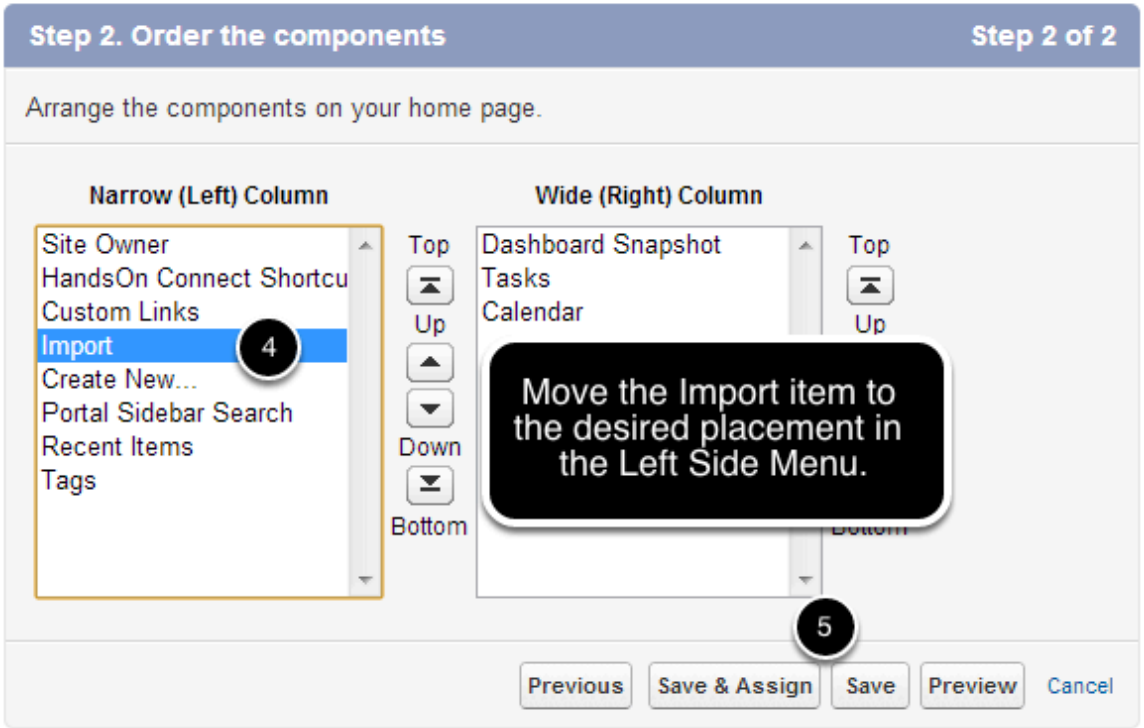


Go to Setup - > Customize -> Home -> Home Page Layouts

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

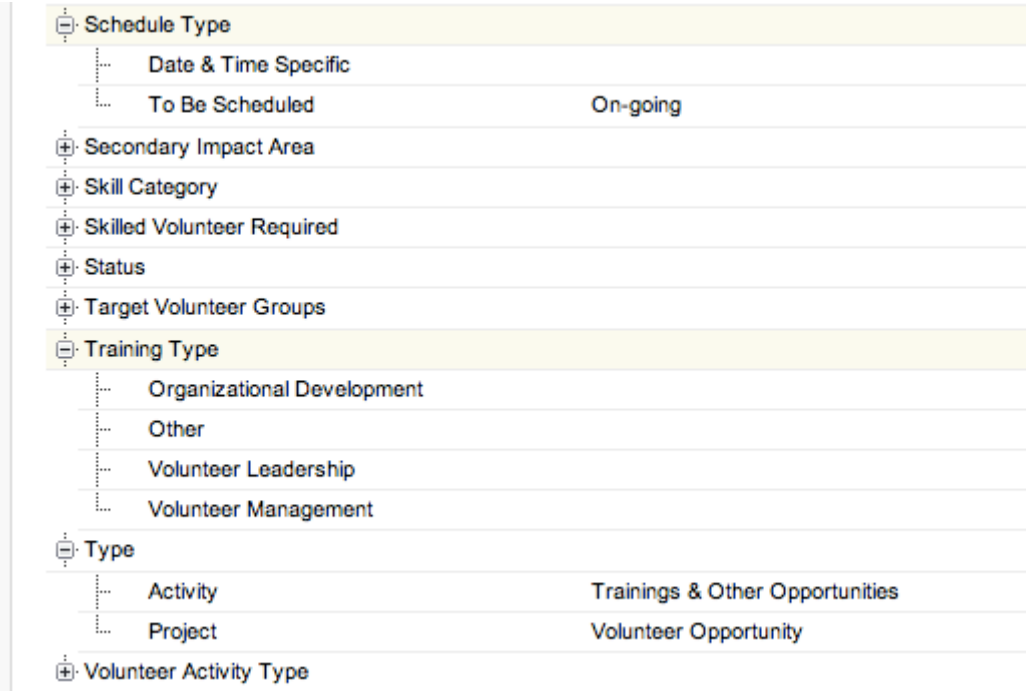



Step 2. Order the components
Step 2 of 2
Arrange the components on your home page.
Narrow (Left) Column
Wide (Right) Column
Site Owner
HandsOn Connect Shortcu
Custom Links
Import
Create New...
Portal Sidebar Search
Recent Items
Tags
4
Top
Up
Down
Bottom
Dashboard Snapshot
Tasks
Calendar
Top
Up
Move the Import item to the desired placement in the Left Side Menu.
5
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 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 unqiue 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

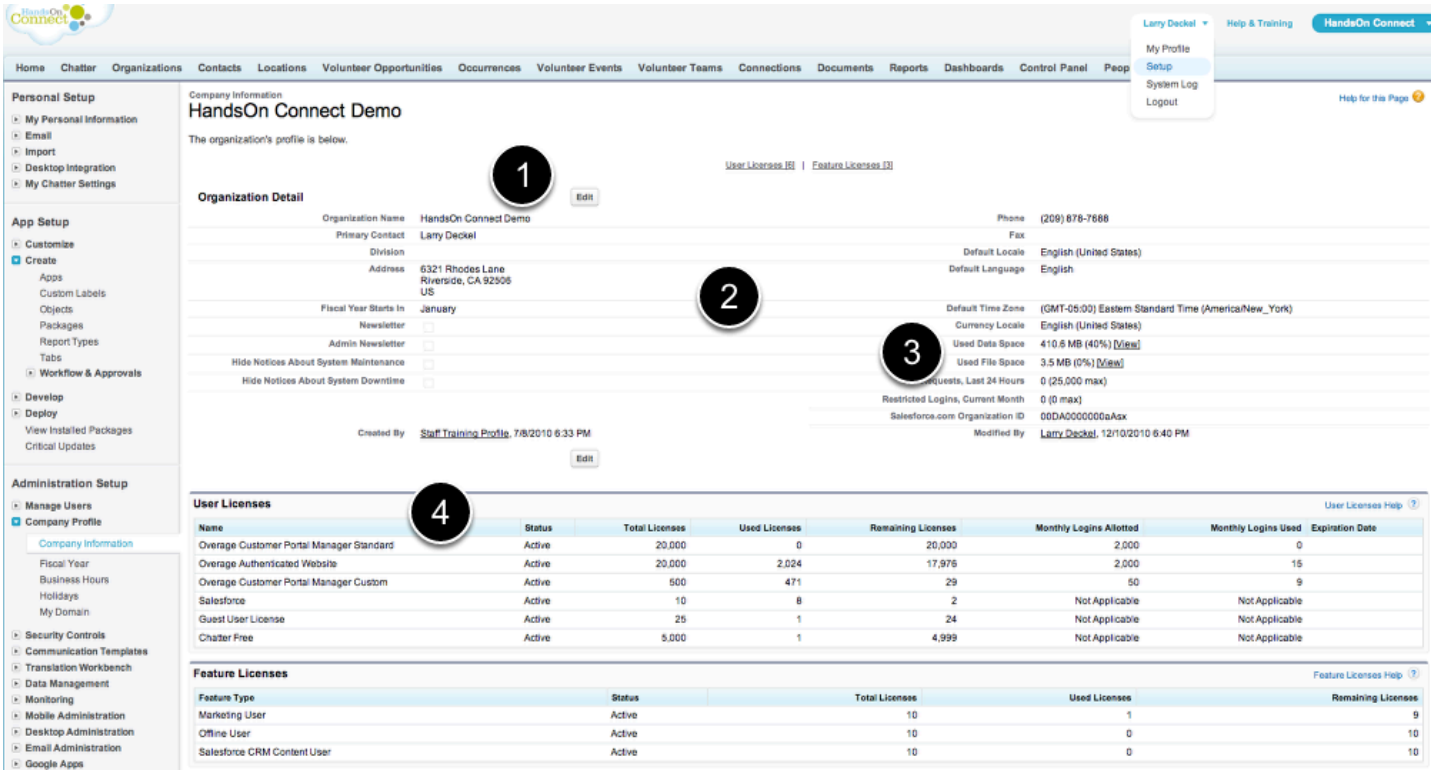
Salesforce Configuration instructions

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



1. Click on Edit to make changes

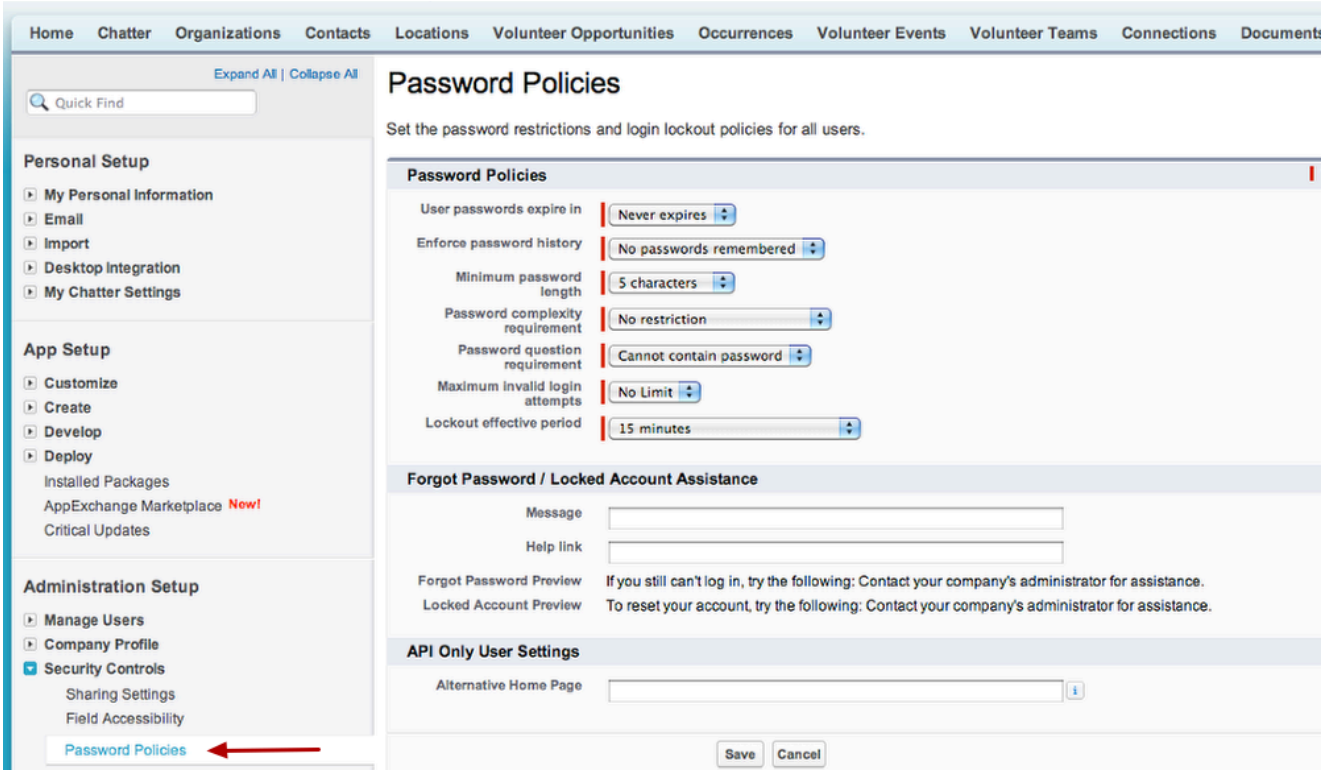
2. Update information about your organization

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 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.)

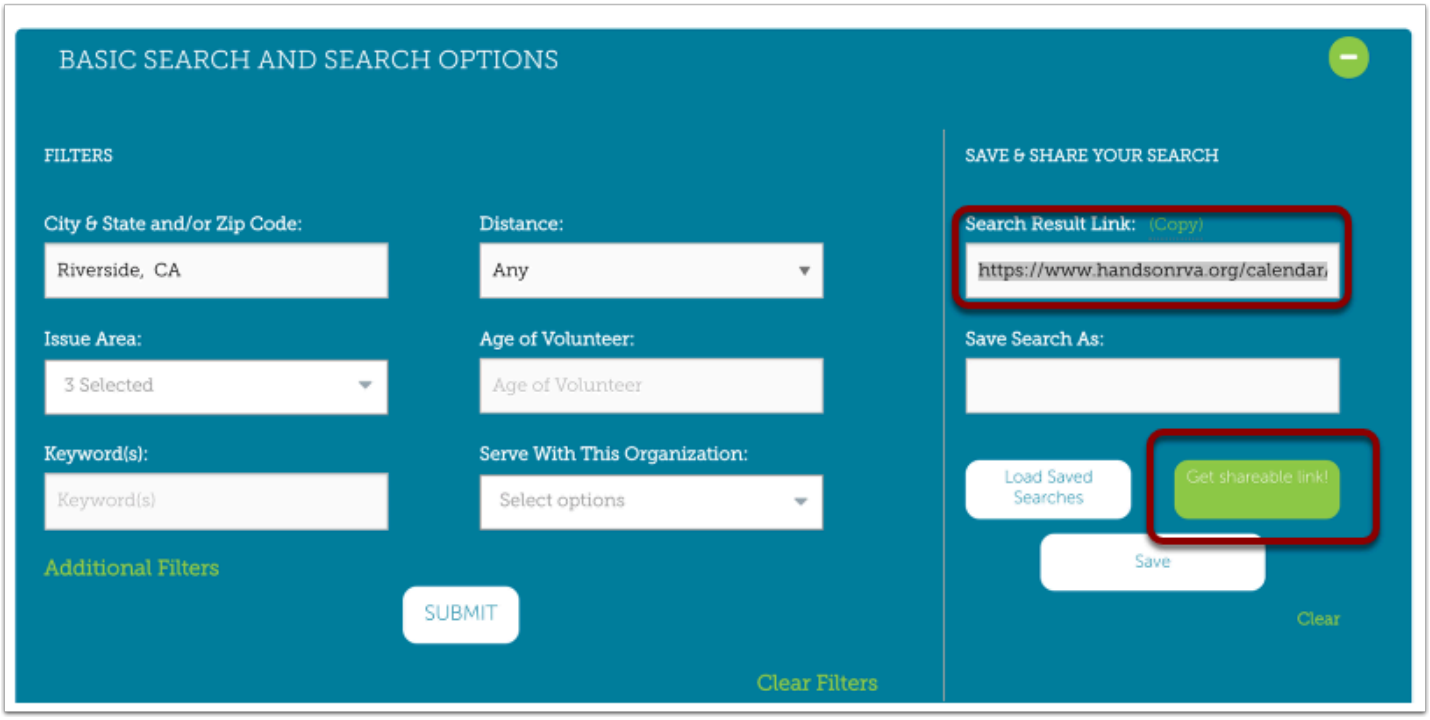
Other considerations:

- 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:

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).

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:

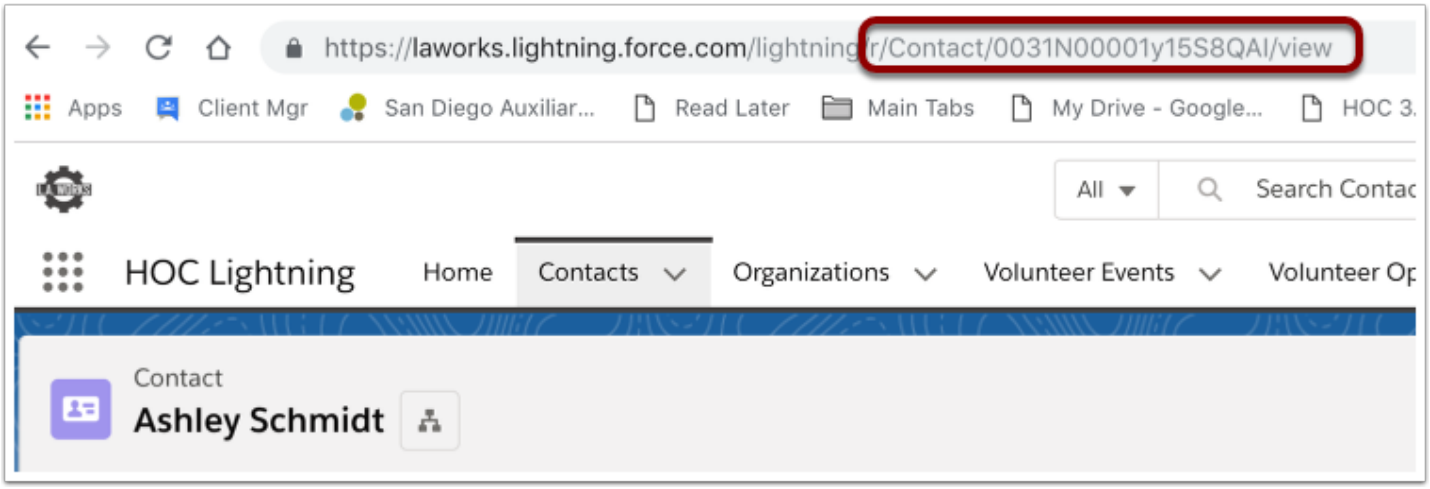
Site 3.0 Created By.
Site3.0 ModifiedBy

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

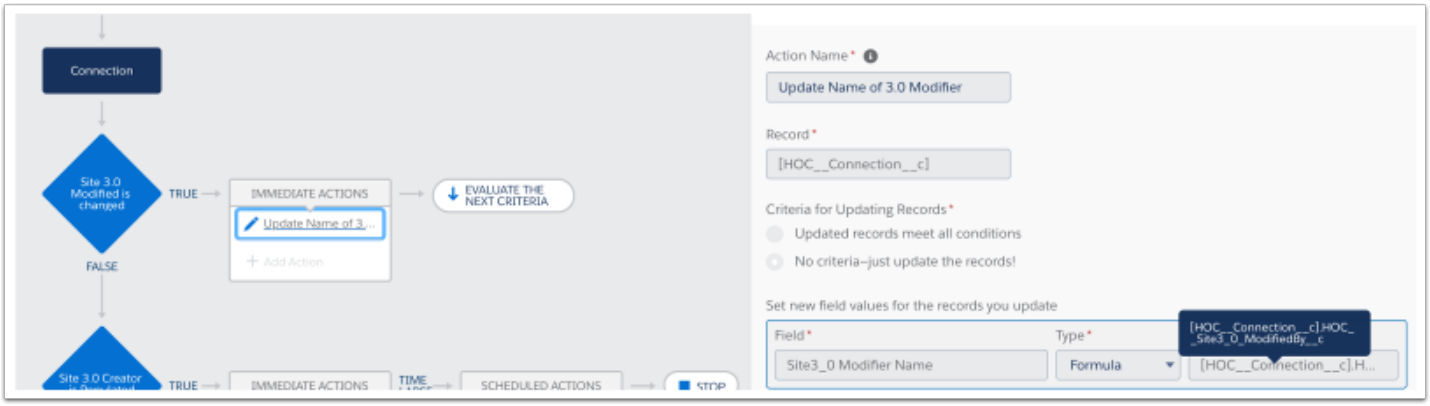
Site 3-0 Creator Name and build the following process.

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

Object = Connection

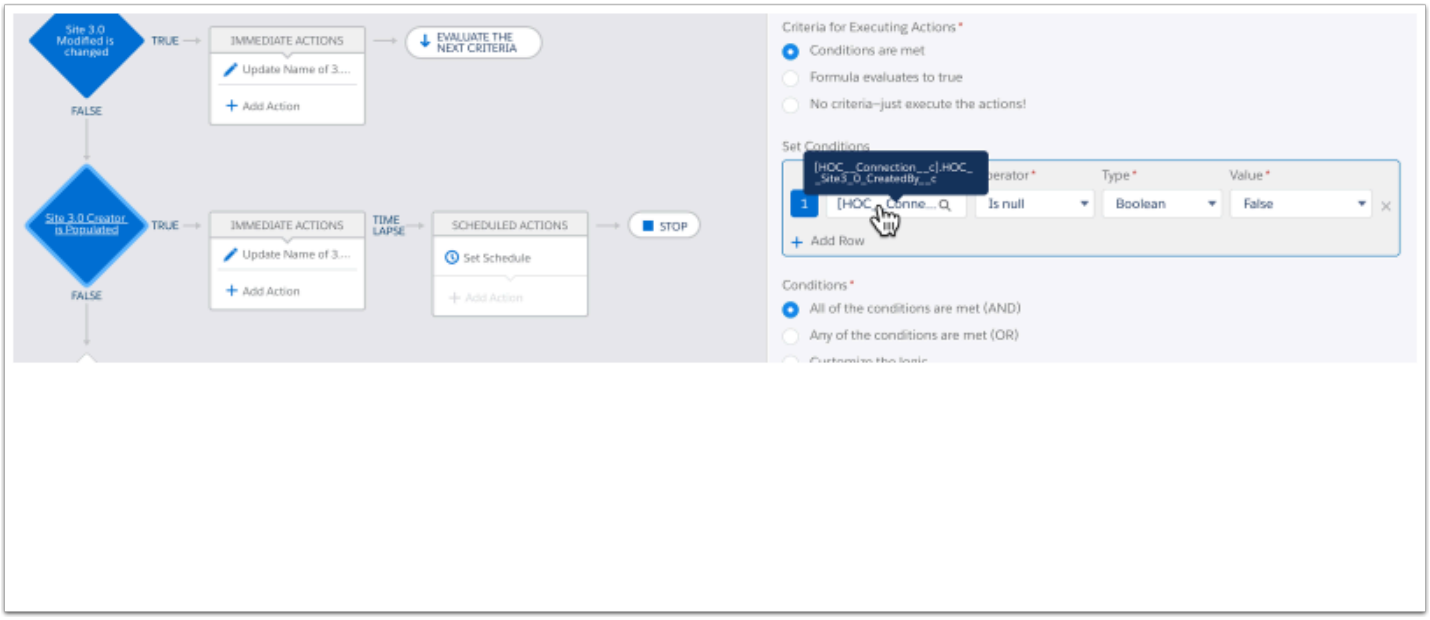
First Criteria: Site 3.0 Modified is Changed

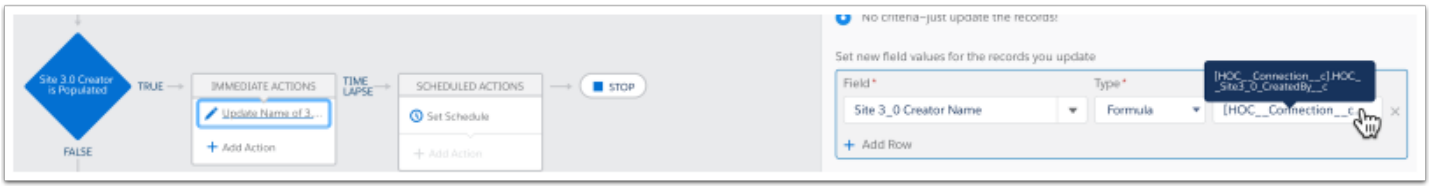
use the following criteria and one immediate action



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.

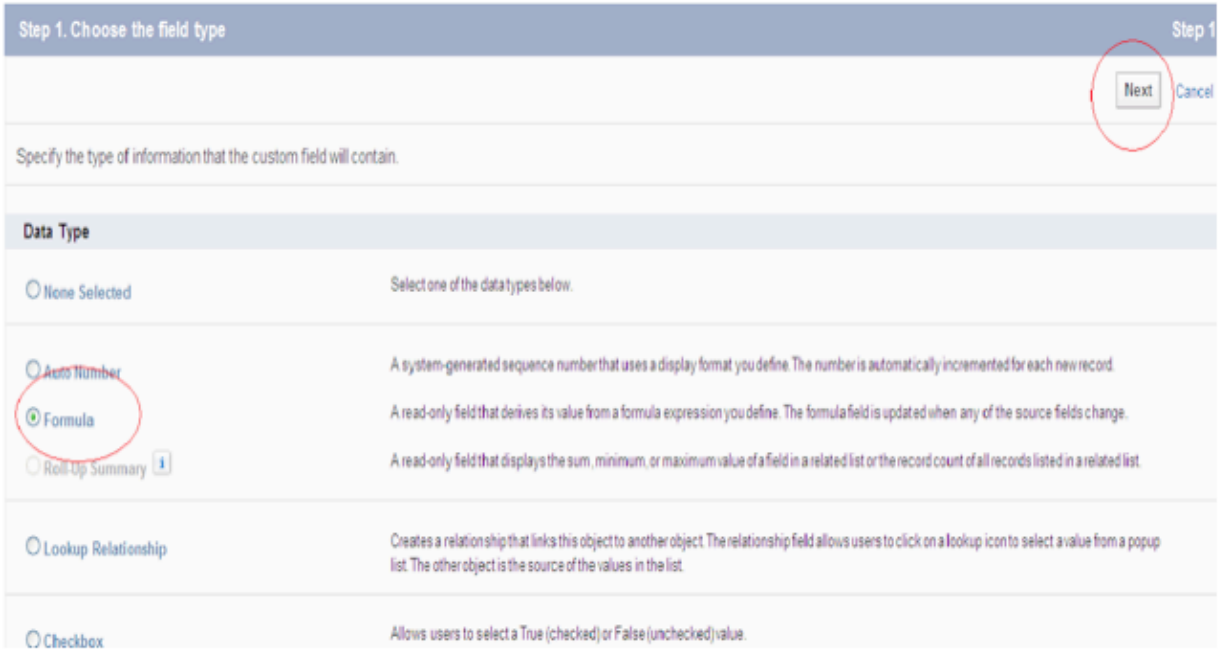
(Note: Reports are usually the best way to bring data from different objects together into an easy to see view however occasionally you may want a few items to be visible in the object record itself.)

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"



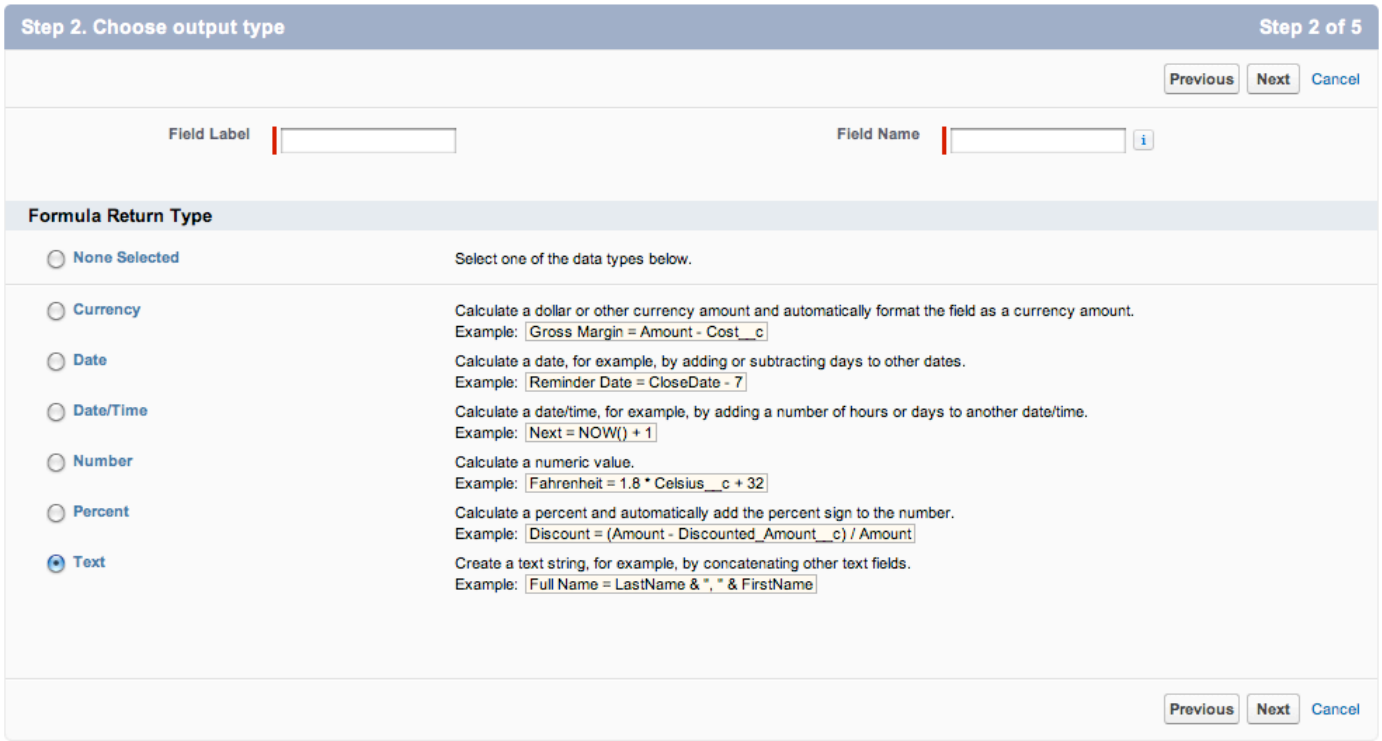
Step:4 Give a suitable name in Field Label and selet Text Formula Return Type , click on next Button

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

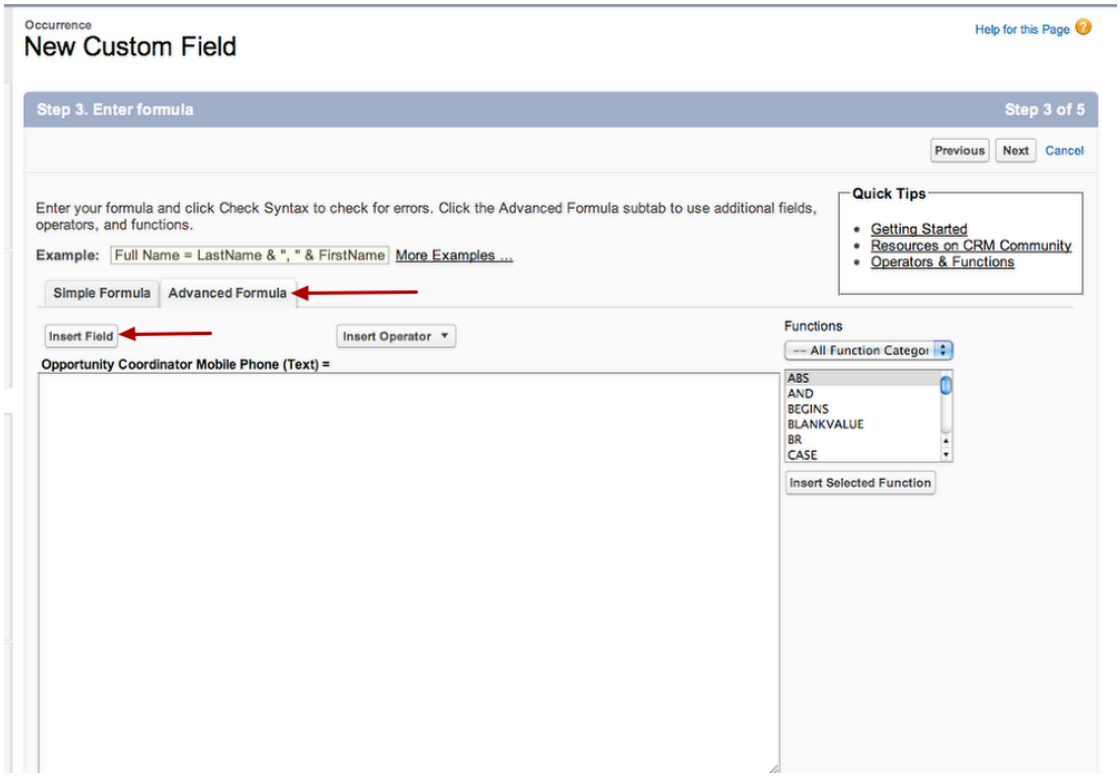
If you haven't already -- add the lookup field for the contact.

Then you will create another field -- of type Formula

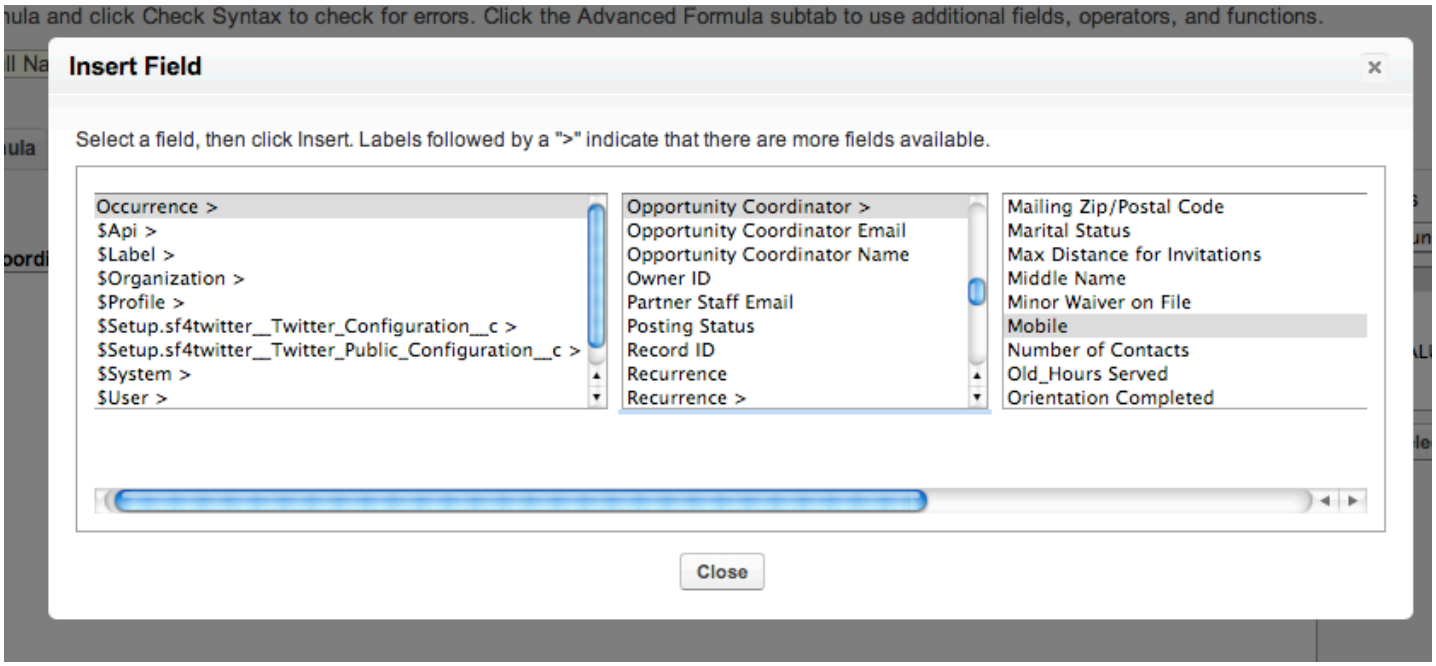
Select Text as the data type



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.



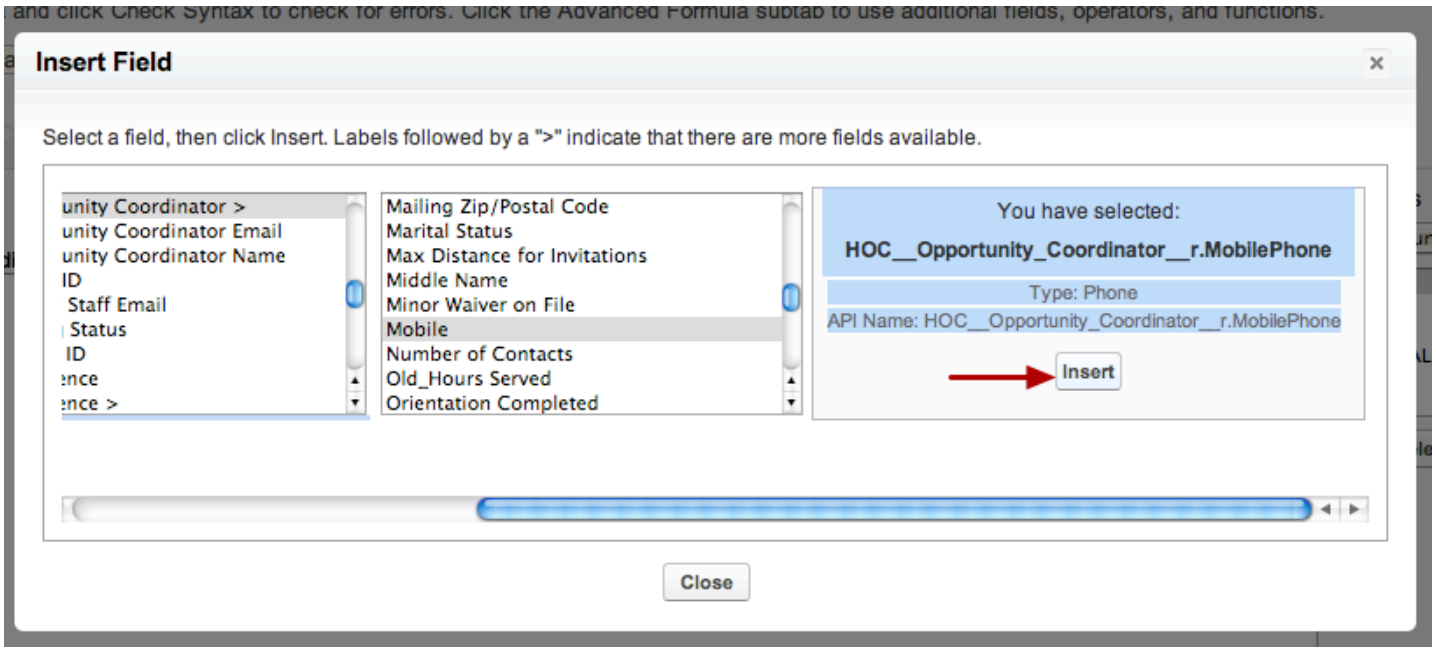
Click on the **Advanced Formula** tab, and then **Insert Field** button



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.

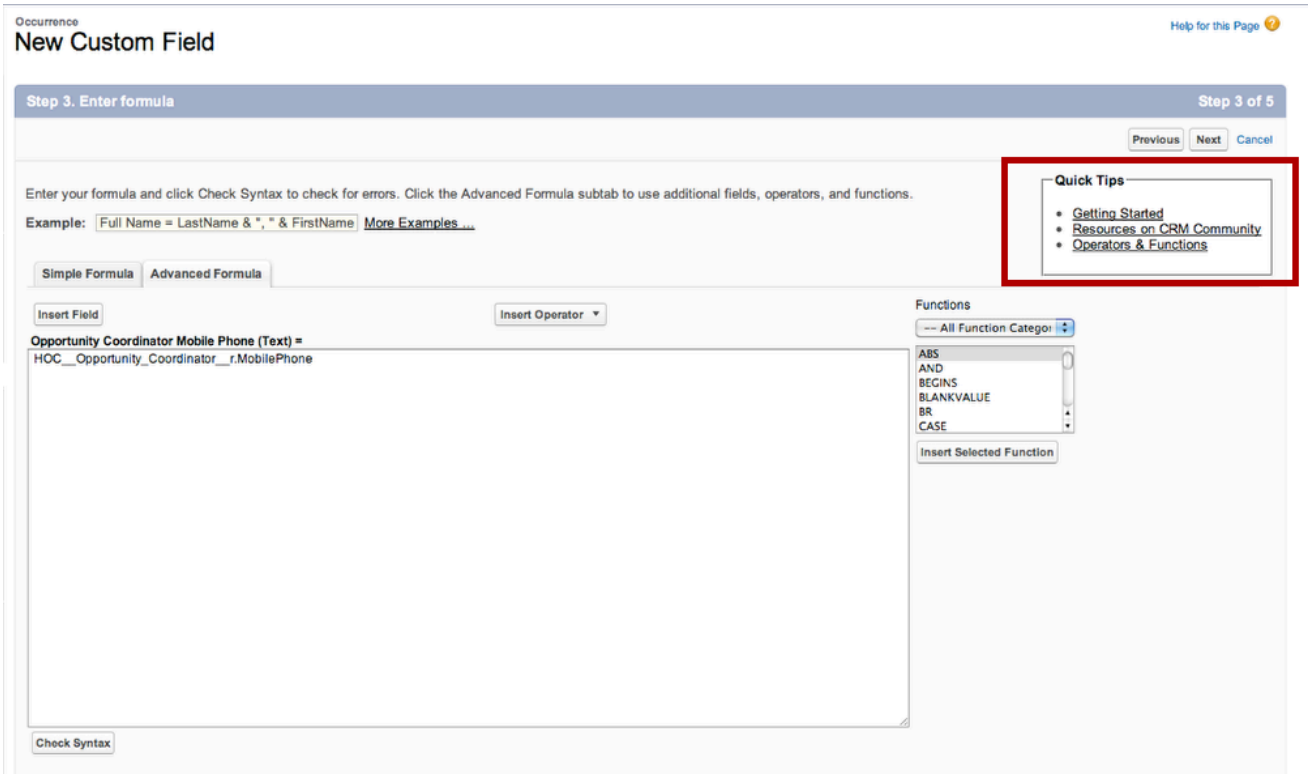
We follow the hierarchy from Occurrence to Opportunity Coordinator (the lookup field already in the object), to all the fields related to the Opportunity Coordinator.

We select Mobile .



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

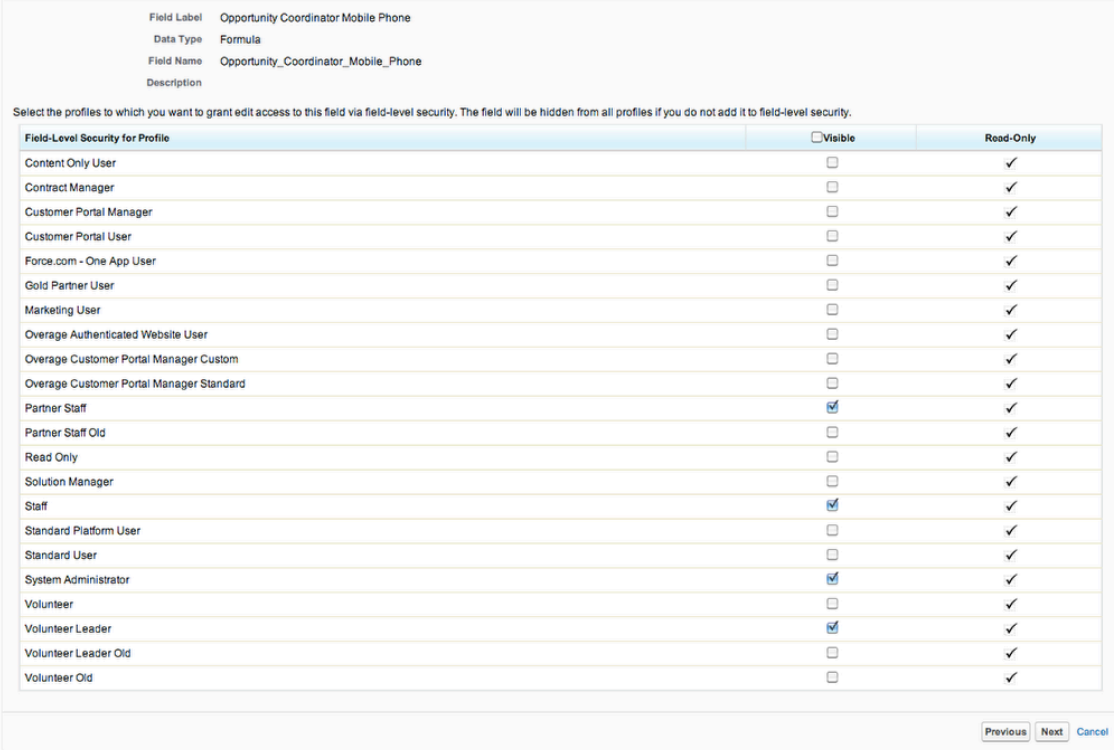
Note: if there are more than one contacts on the Occurrence object -- we'd need to make sure we selected the right 'lookup' to get to the phone of the correct person.



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)



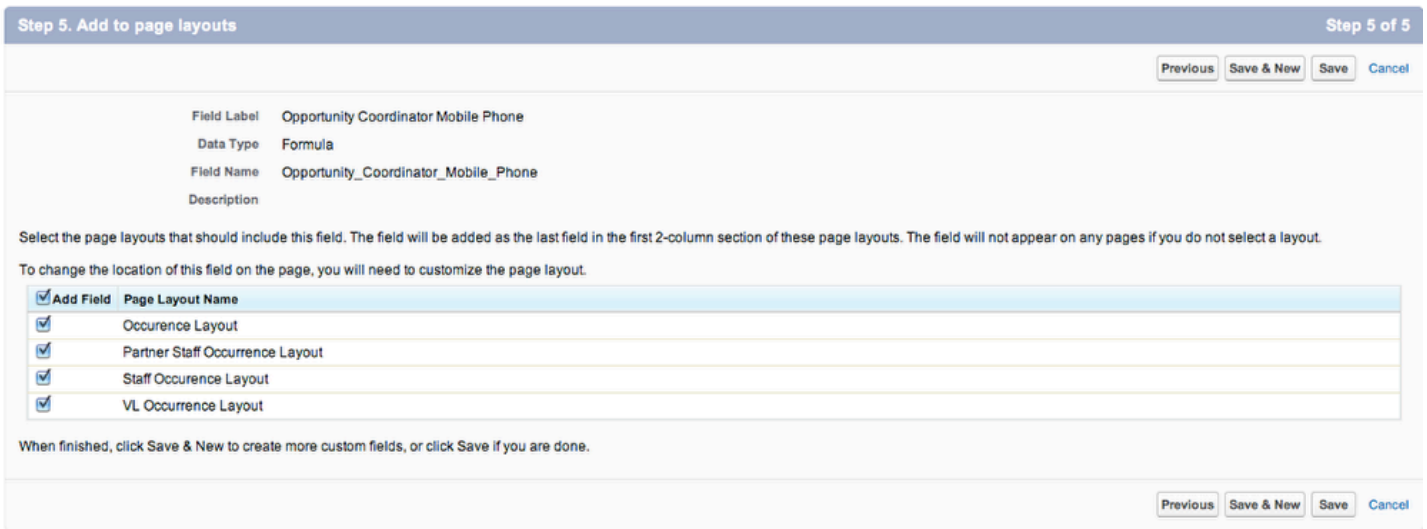
Field Label	Opportunity Coordinator Mobile Phone
Data Type	Formula
Field Name	Opportunity_Coordinator_Mobile_Phone
Description	

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	Visible	Read-Only
Content Only User	☐	✓
Contract Manager	☐	✓
Customer Portal Manager	☐	✓
Customer Portal User	☐	✓
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	☐	✓
Staff	☑	✓
Standard Platform User	☐	✓
Standard User	☐	✓
System Administrator	☑	✓
Volunteer	☐	✓
Volunteer Leader	☑	✓
Volunteer Leader Old	☐	✓
Volunteer Old	☐	✓

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

Previous Save & New Save Cancel

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.

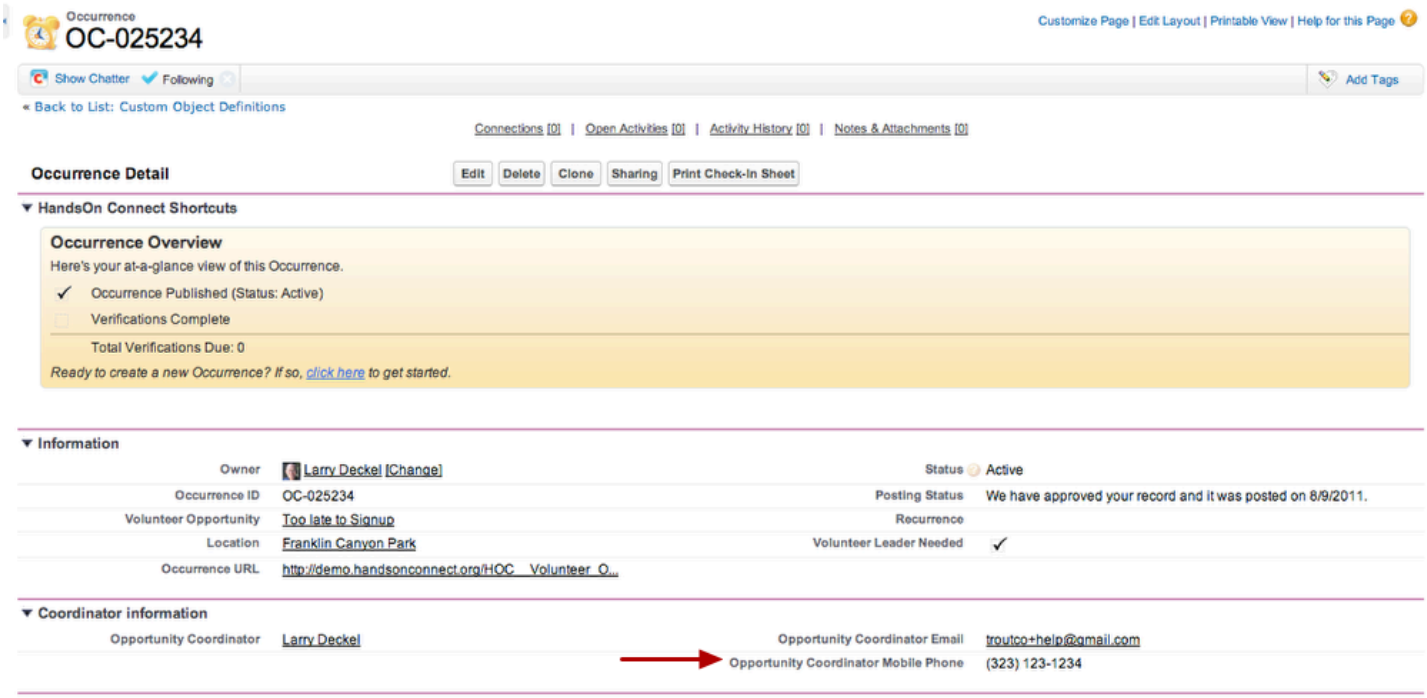
Add Field	Page Layout Name
☑	Occurence Layout
☑	Partner Staff Occurrence Layout
☑	Staff Occurence Layout
☑	VL Occurrence Layout

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

Previous Save & New Save Cancel

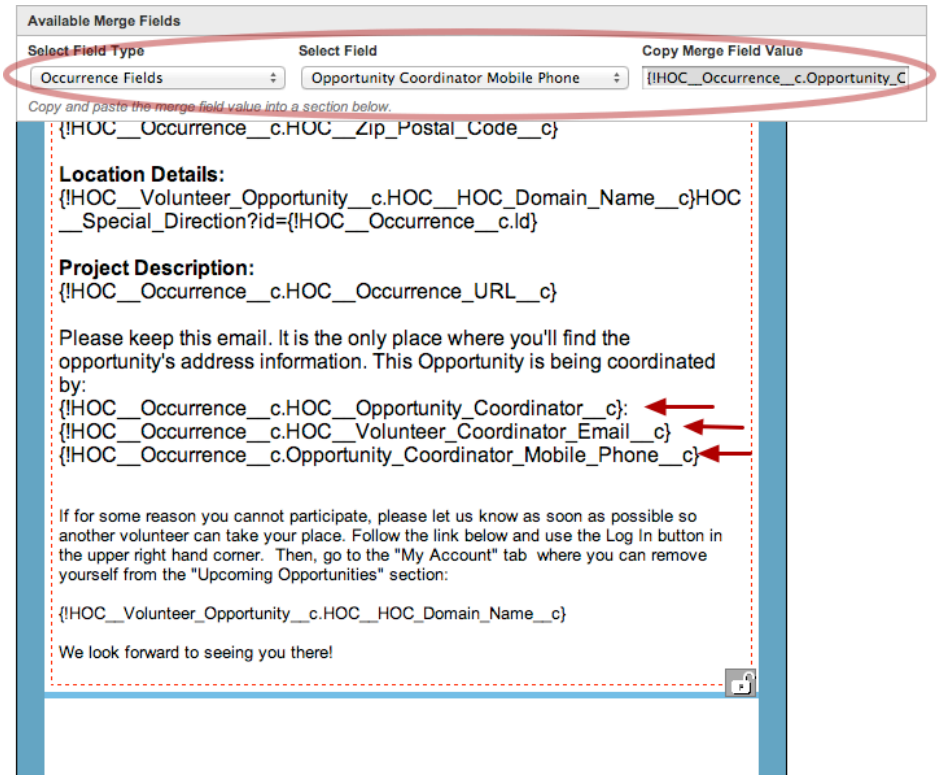
Then, modify the page layout to place the field exactly where you'd like it.

Our new page layout has the Mobile phone now appearing!



(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



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 threee 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><img width="274" height="250" src="http://www.enviroblog.org/Kids%20playing.jpg" style="float: right;" alt="" /><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="../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	 Hosts are needed to serve as escorts in t...

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 Nan	Description	End Date
* Morning Restoration at Clatsop Butte	<FONT color="purple">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. </FONT> 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! <FONT color="purple">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: </FONT> Youth Volunteer Release Form </FONT>	4/26/13
Abbott Volunteer Day		12/31/12
Apples, Kisses and Shoes	We'll be reading stories and filling the hearts of the young ones at this care facility with joy. 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. Their mission: to ensure that children have as normal as environment during their transitional period. Project requirements: Join Flex. Minimum Age: 18. All volunteers must have valid Polinsky Center IDs. New volunteers are not being accepted at this time.	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 Edit | Set Field-Level Security | View 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

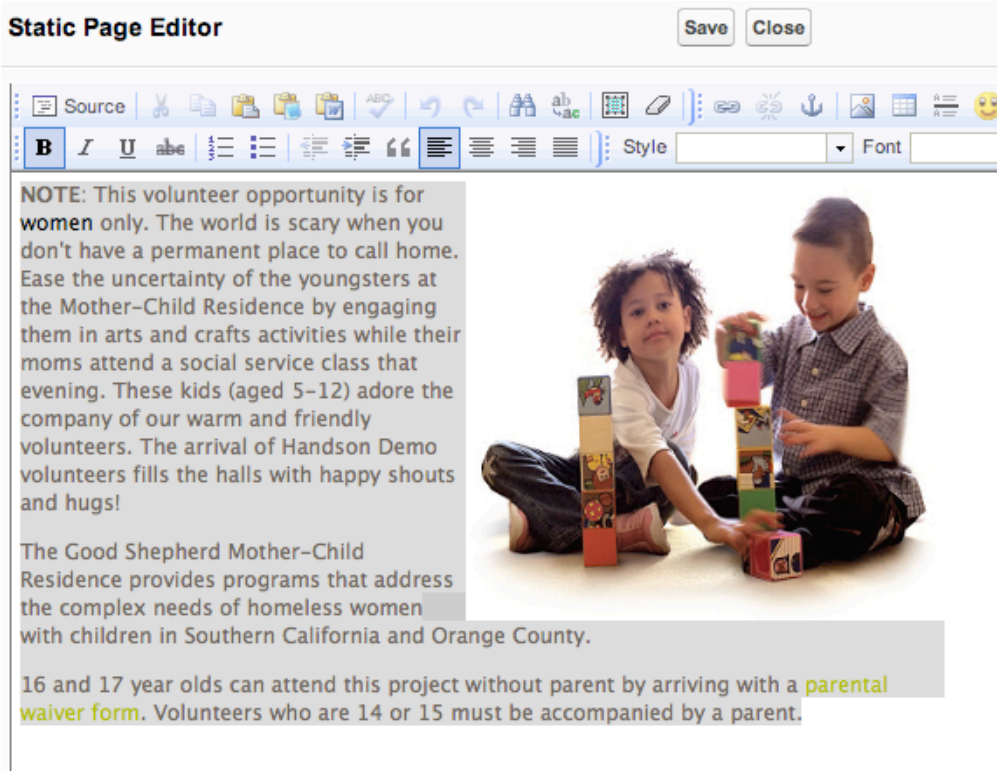
Modifying Page Layouts

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:

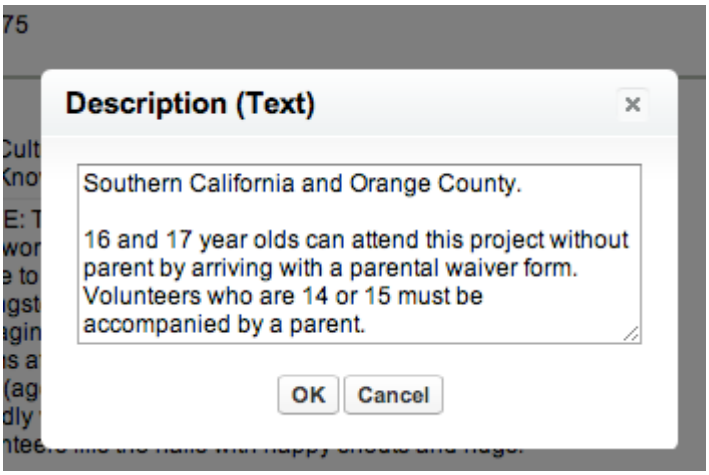


Now Select ALL the text you see and copy it to your clipboard. (In the WYSIWYG view -- not in the source code)

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



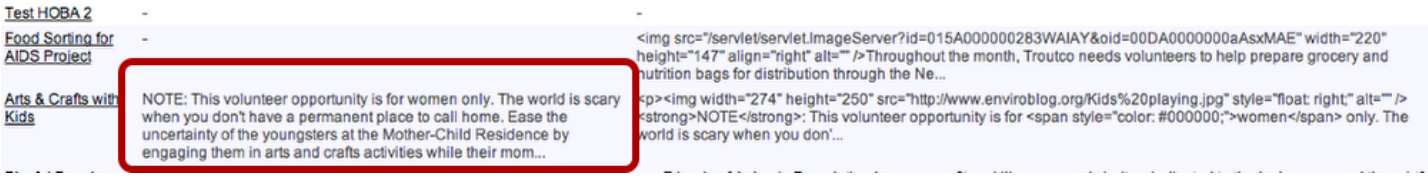
Because its a text only field it will just paste in the text. It won't pick up bold, font formats or hyperlinks. Just the plain text! It even preserves the line breaks.

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).

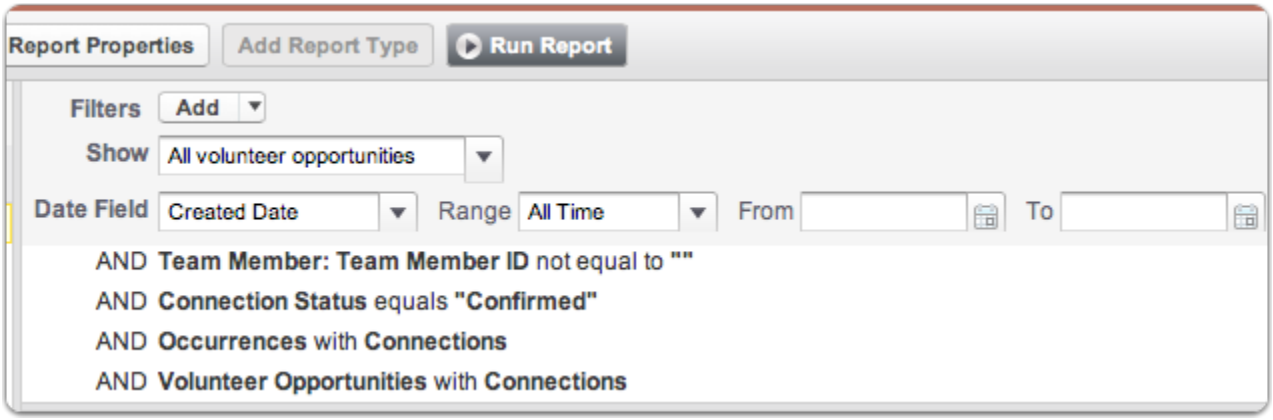
Export to Excel to see the complete description (along with any other fields you want to make part of your report!

Excel Report showing our new field (left) and the old field contents (right)

Arts & Crafts with Kids	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.	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.	12/31/13

Creating a Report to monitor team signups as a percentage of total connections

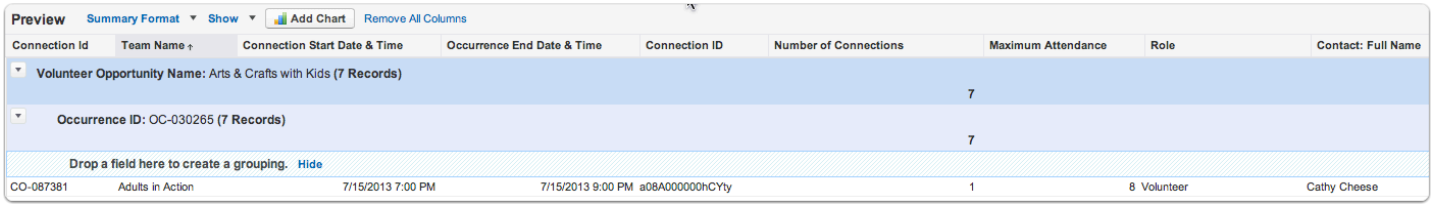
Create a Report of type "HOC Vol Opps and Occurrences with/without connections



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

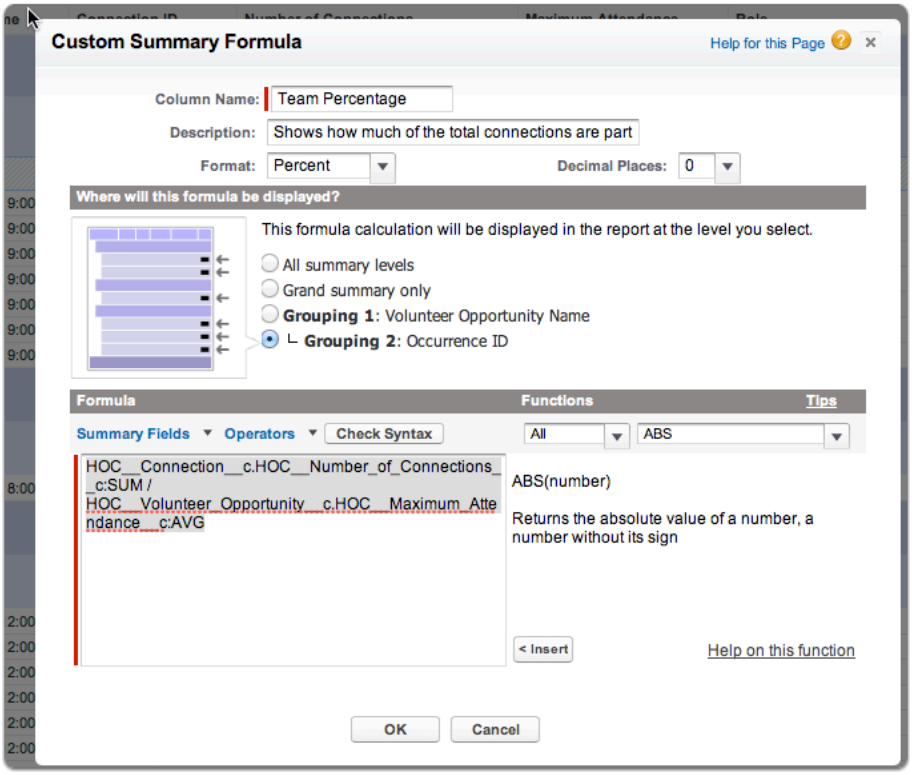


You can add more or fewer fields depending on what info you want to see in the report.

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:

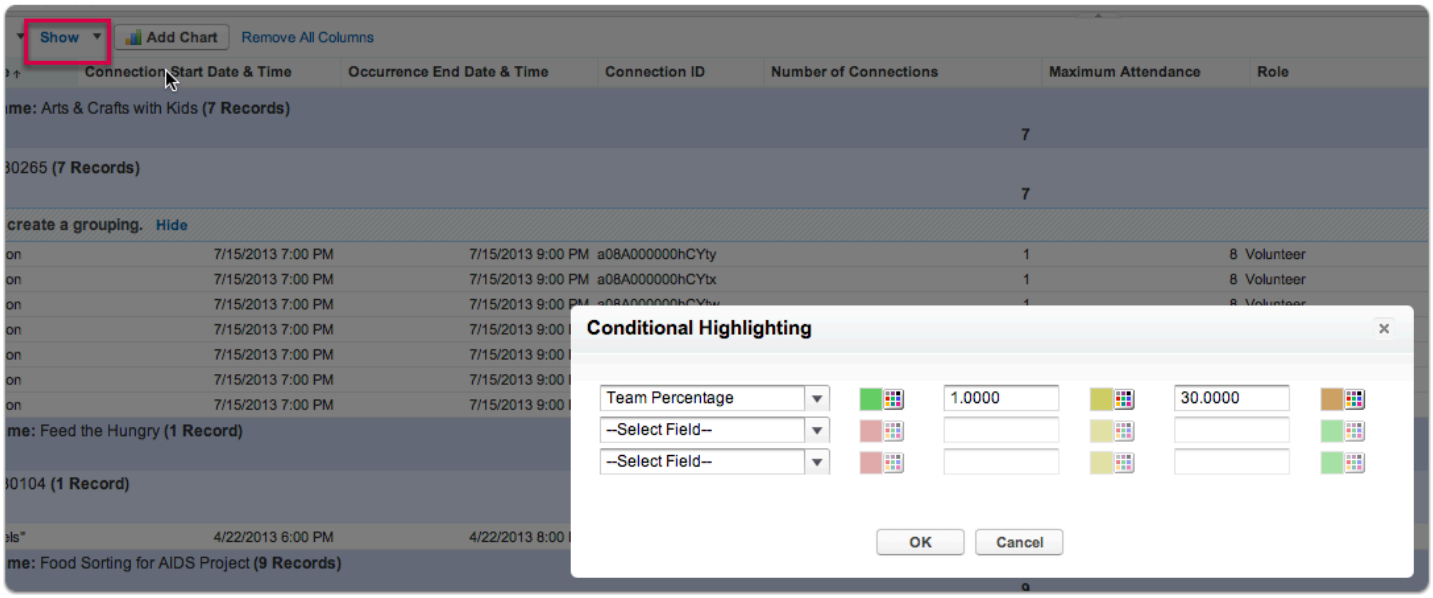


The formula is: HOC__Connection__c.HOC__Number_of_Connections__c:SUM / HOC__Volunteer_Opportunity__c.HOC__Maximum_Attendance__c:AVG

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!

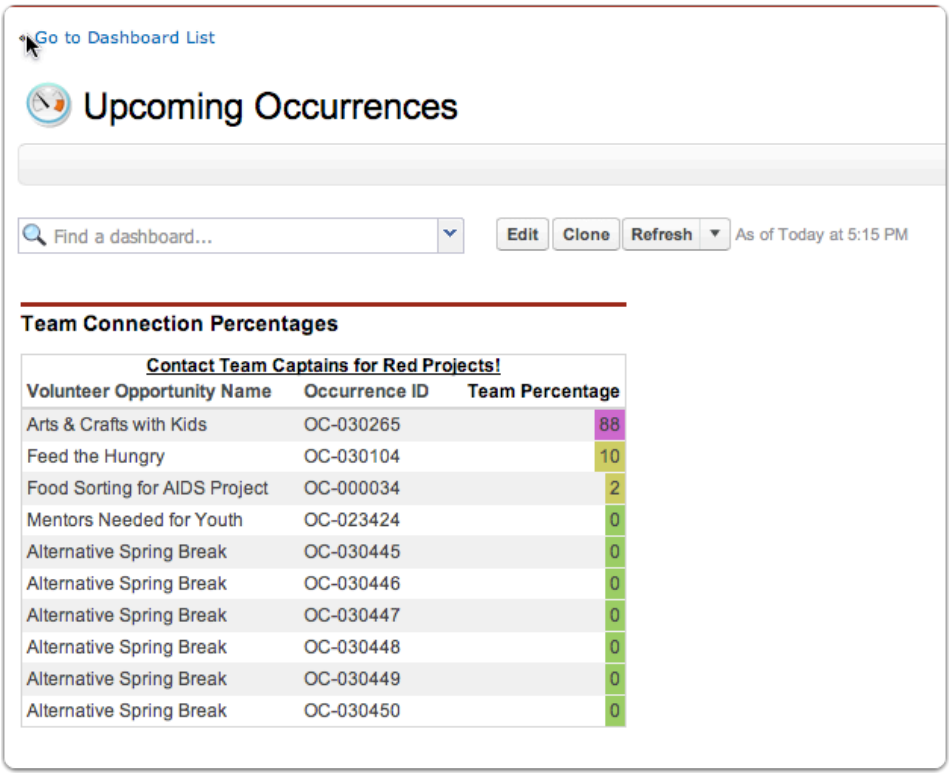
Here's how my report looks when I run it. (Note: It shows ALL upcoming occurrences, whether or not they have ANY team connections at all -- but the number of connections remains at zero.)

					0				0%
-	-	4/27/2013 12:00 PM	-		-	30	-		
Volunteer Opportunity Name: Arts & Crafts with Kids (30 records)					7				
Occurrence ID: OC-030259 (1 record)					0				0%
-	-	4/22/2013 9:00 PM	-		-	8	-		
Occurrence ID: OC-030260 (1 record)					0				0%
-	-	5/6/2013 9:00 PM	-		-	8	-		
Occurrence ID: OC-030261 (1 record)					0				0%
-	-	5/20/2013 9:00 PM	-		-	8	-		
Occurrence ID: OC-030262 (1 record)					0				0%
-	-	6/3/2013 9:00 PM	-		-	8	-		
Occurrence ID: OC-030263 (1 record)					0				0%
-	-	6/17/2013 9:00 PM	-		-	8	-		
Occurrence ID: OC-030264 (1 record)					0				0%
-	-	7/1/2013 9:00 PM	-		-	8	-		
Occurrence ID: OC-030265 (7 records)					7				88%
CO-087381	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A000000hCYty	1	8	Volunteer	Cathy Cheese	
CO-087380	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A000000hCYtx	1	8	Volunteer	April Adams	
CO-087379	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A000000hCYtw	1	8	Volunteer	Doug Doggy	
CO-087378	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A000000hCYtv	1	8	Volunteer	Bob Barker	
CO-087377	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A000000hCYtu	1	8	Volunteer	Frank Fox	
CO-087376	Adults in Action	7/15/2013 7:00 PM	7/15/2013 9:00 PM	a08A000000hCYtt	1	8	Volunteer	Edna Edison	
CO-087375	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: OC-030266 (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.

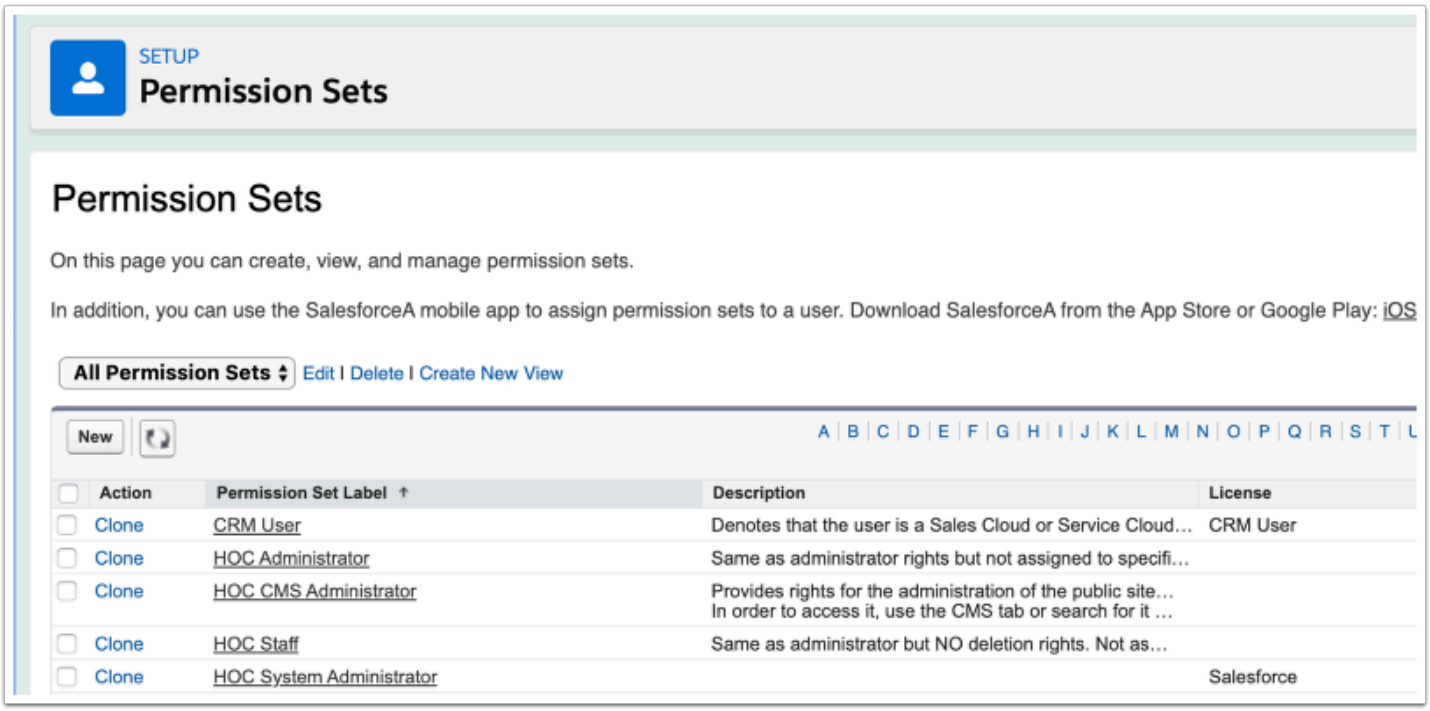
Granting HOC Access to other Salesforce Profiles

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:

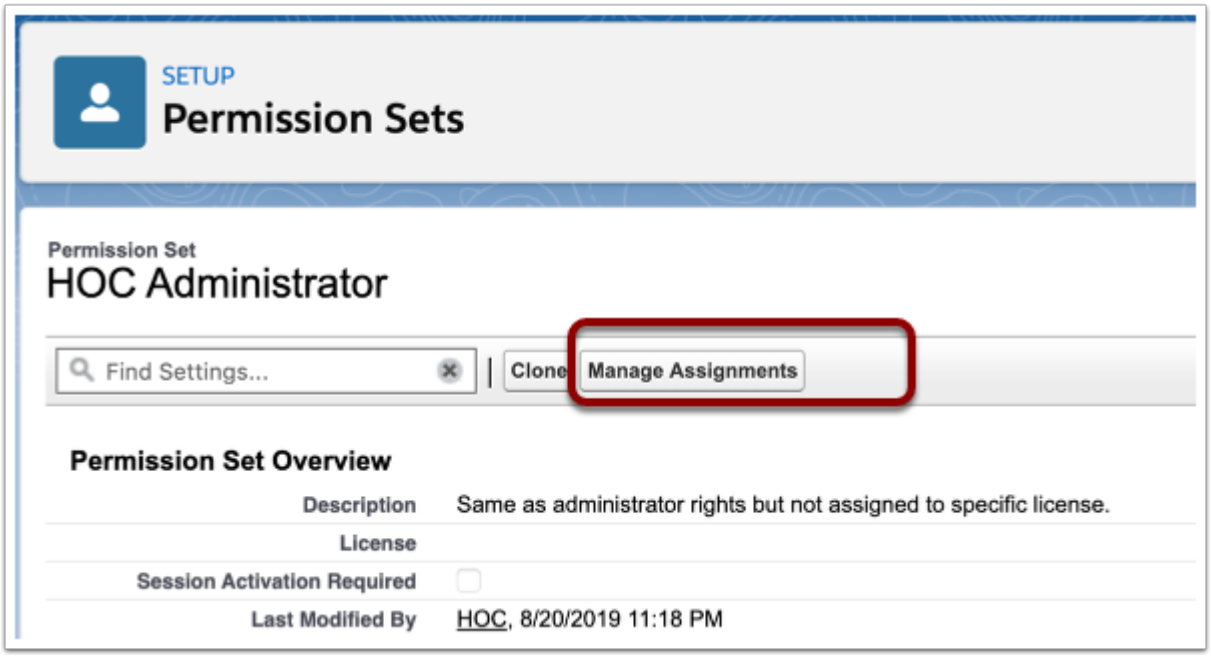


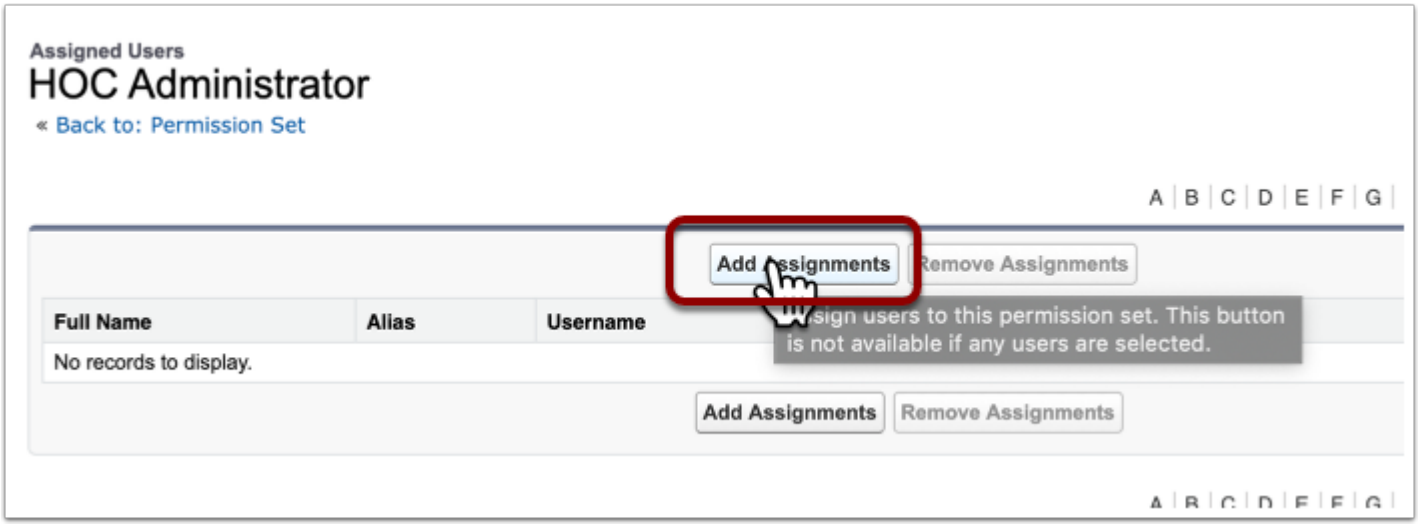
The Four Permission sets available

- 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 Adminstrator 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.

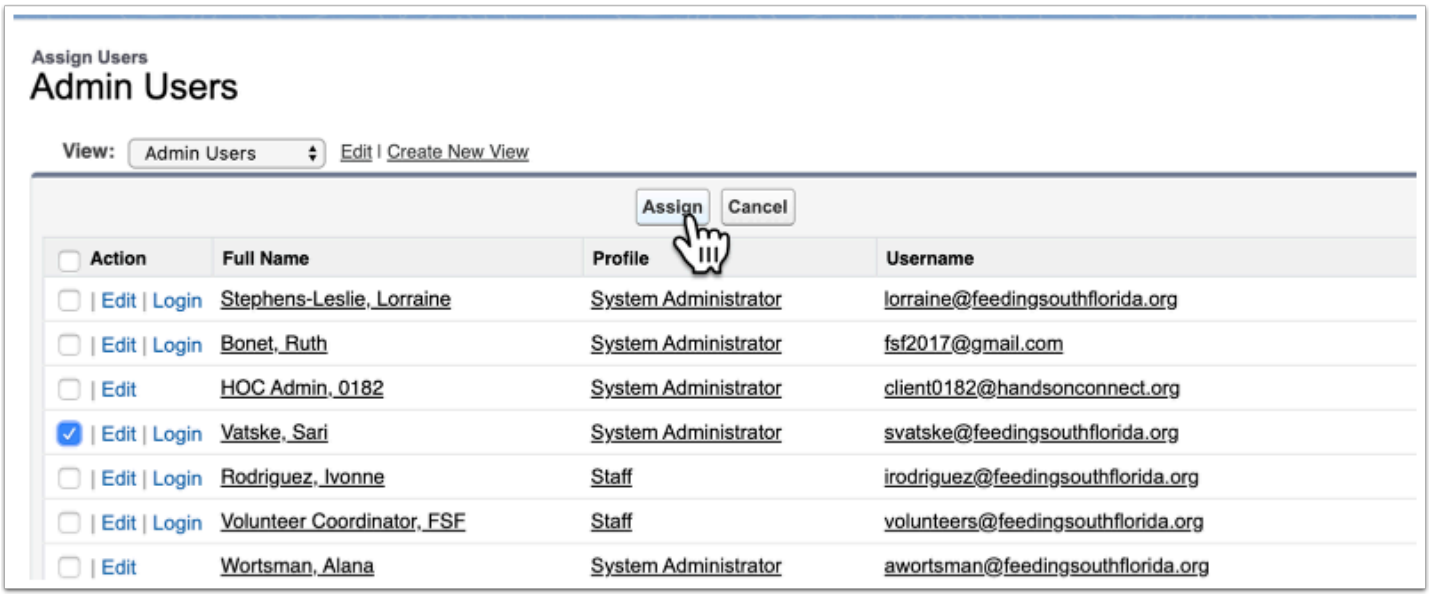
To assign a Permission Set to a user:

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
Action
Full Name
Profile
Username
| Edit | Login
Stephens-Leslie, Lorraine
System Administrator
lorraine@feedingsouthflorida.org
| Edit | Login
Bonet, Ruth
System Administrator
fsf2017@gmail.com
| Edit
HOC Admin, 0182
System Administrator
client0182@handsonconnect.org
| Edit | Login
Vatske, Sari
System Administrator
svatske@feedingsouthflorida.org
| Edit | Login
Rodriguez, Ivonne
Staff
irodriguez@feedingsouthflorida.org
| Edit | Login
Volunteer Coordinator, FSF
Staff
volunteers@feedingsouthflorida.org
| 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.

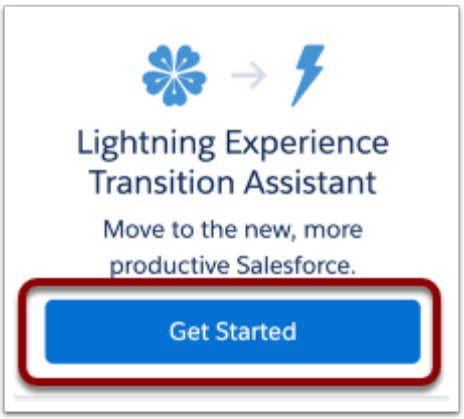
With each Salesforce release, Salesforce changes the process of making the transition to Lightning. These instructions relate to the Lightning Migration process as available in Spring' 2019. This may change in the future - but however its presented, the things you need to 'activate' and be aware of will be the same as to what's indicated in these notes.

Enable Lightning in your Instance

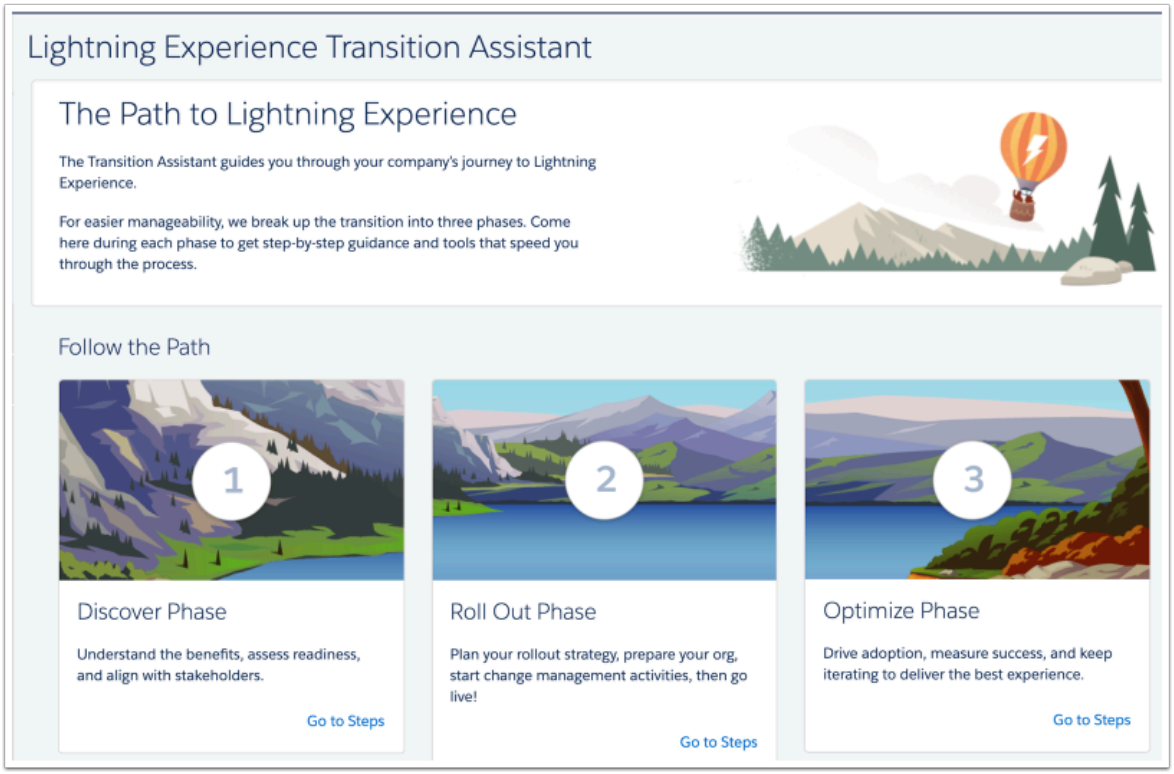
If you've not yet activated lightning in your Salesforce Instance, follow all the steps below.

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



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:

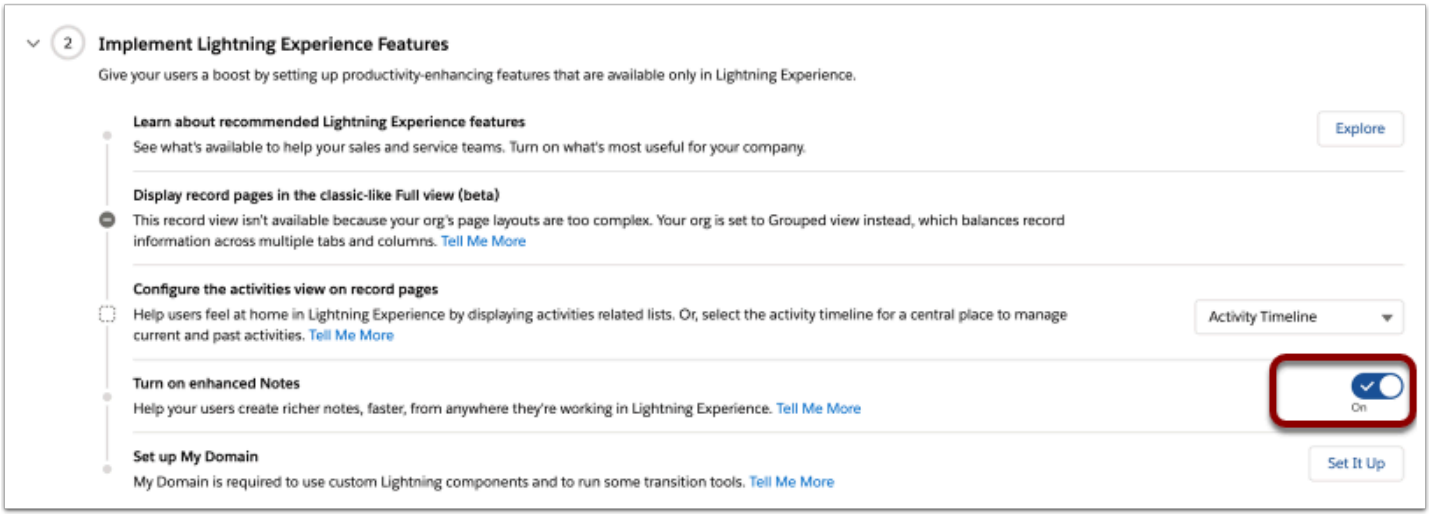
In Step 2 - "Implementing Lightning Experience Features --

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:**



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

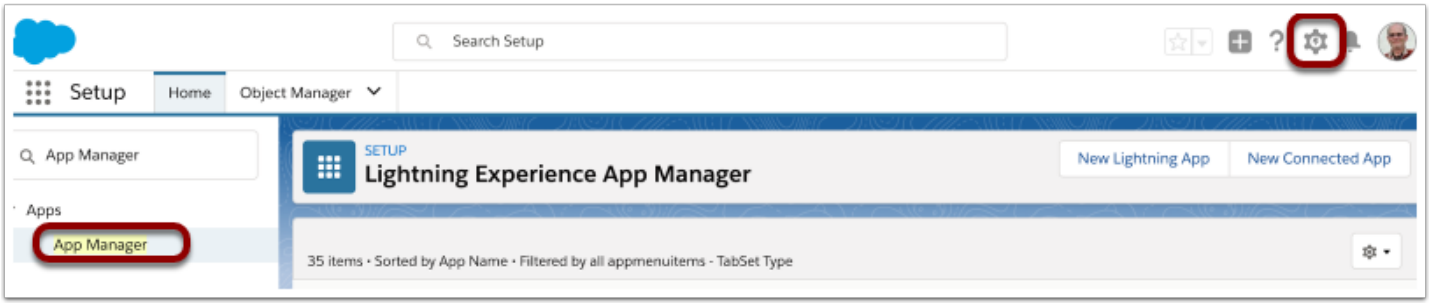
Granting Access to HandsOn Connect Lightning

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".

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:

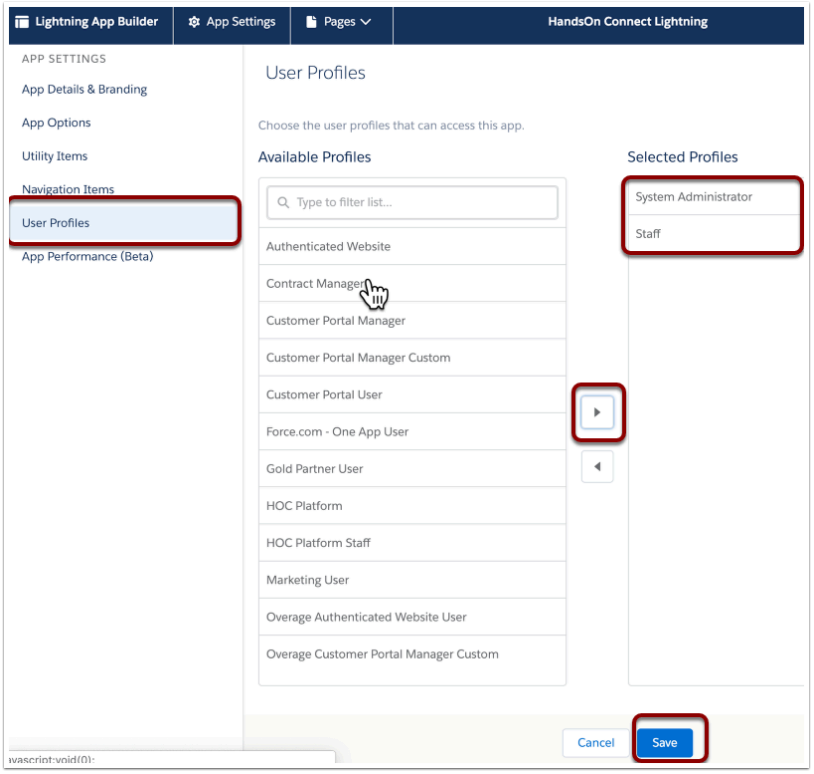
Configure the HandsOn Connect Lightning app to allow access to the User Profiles who use HandsOn Connect.

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:

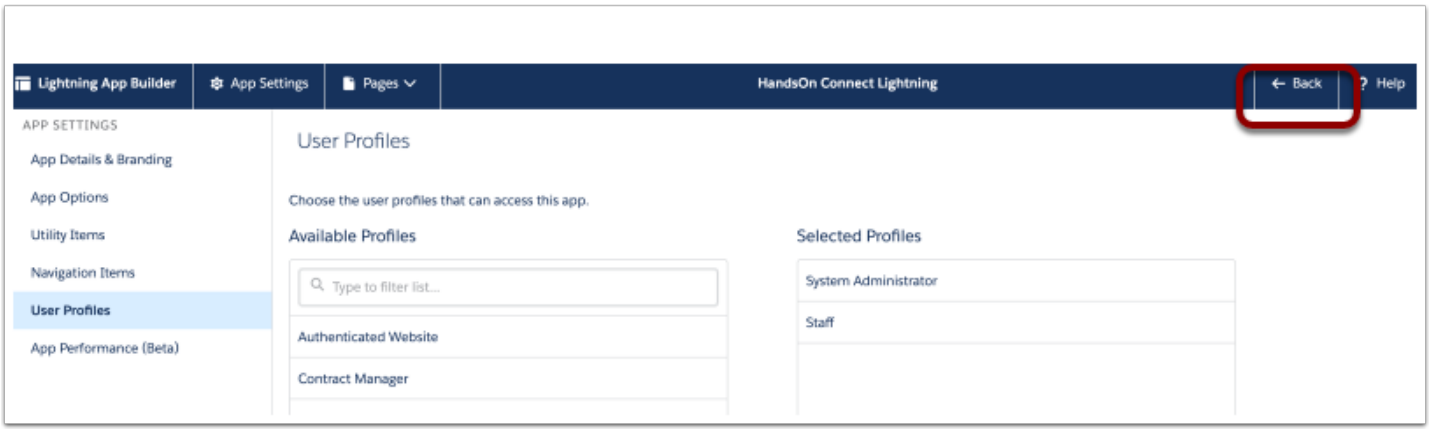
1. System Administrator
2. Staff

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:

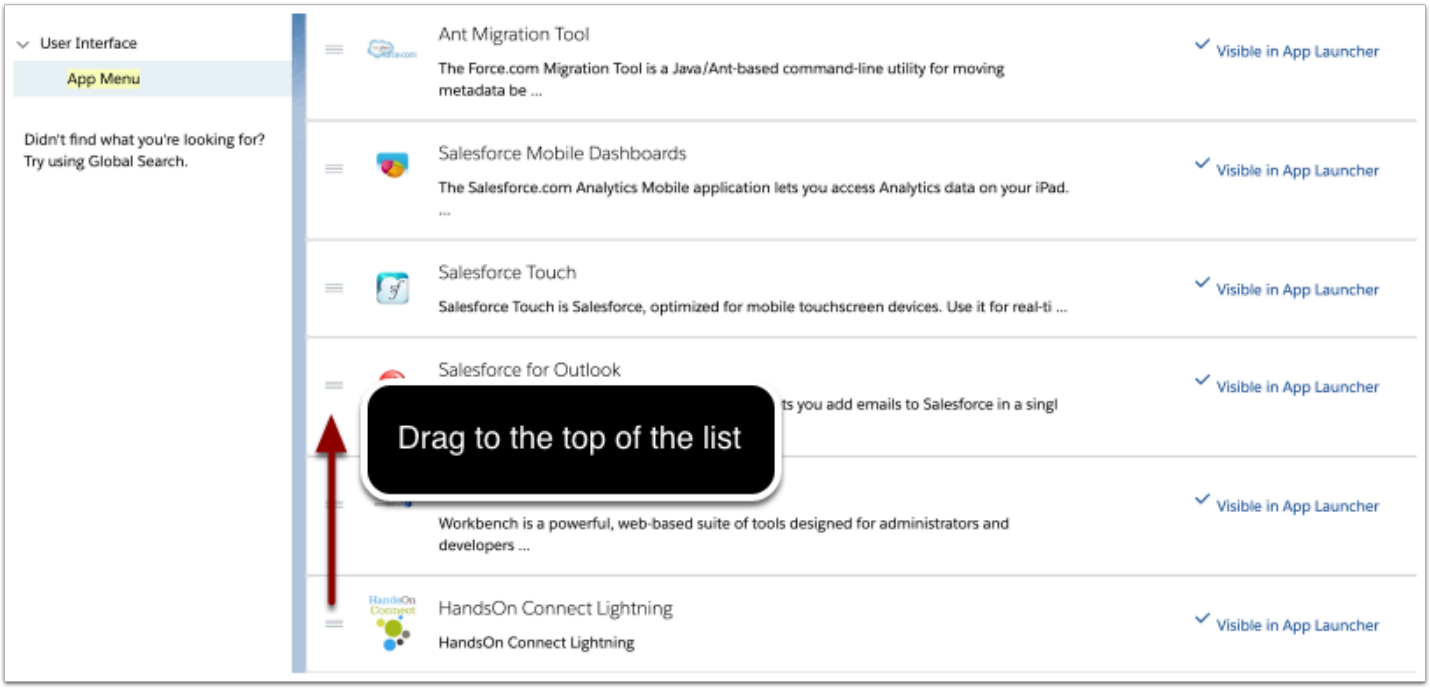


(recommended) Reorder and hide apps in Lightning

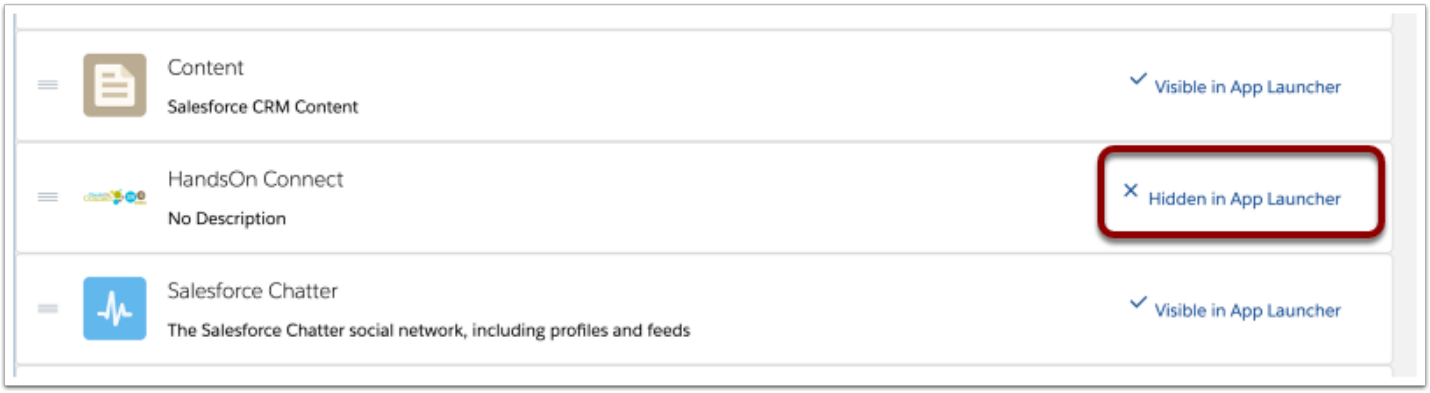
We want it to be clear to our users which HandsOn Connect application to use, so we'll move HandsOn Connect Lightning to the first position, and we'll hide the unneeded "HandsOn Connect" (classic app) from the menu picker.

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:

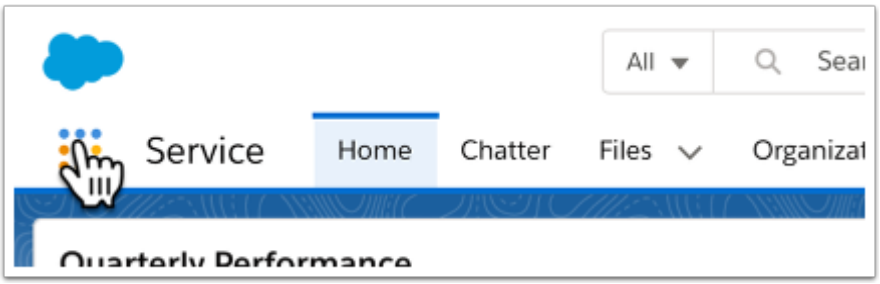


Now.... look for the application "HandsOn Connect. (No description) -- this is the classic app we wish to hide. To do this, click on the words "Visible in App Launcher" so that it changes to "Hidden in App Launcher"

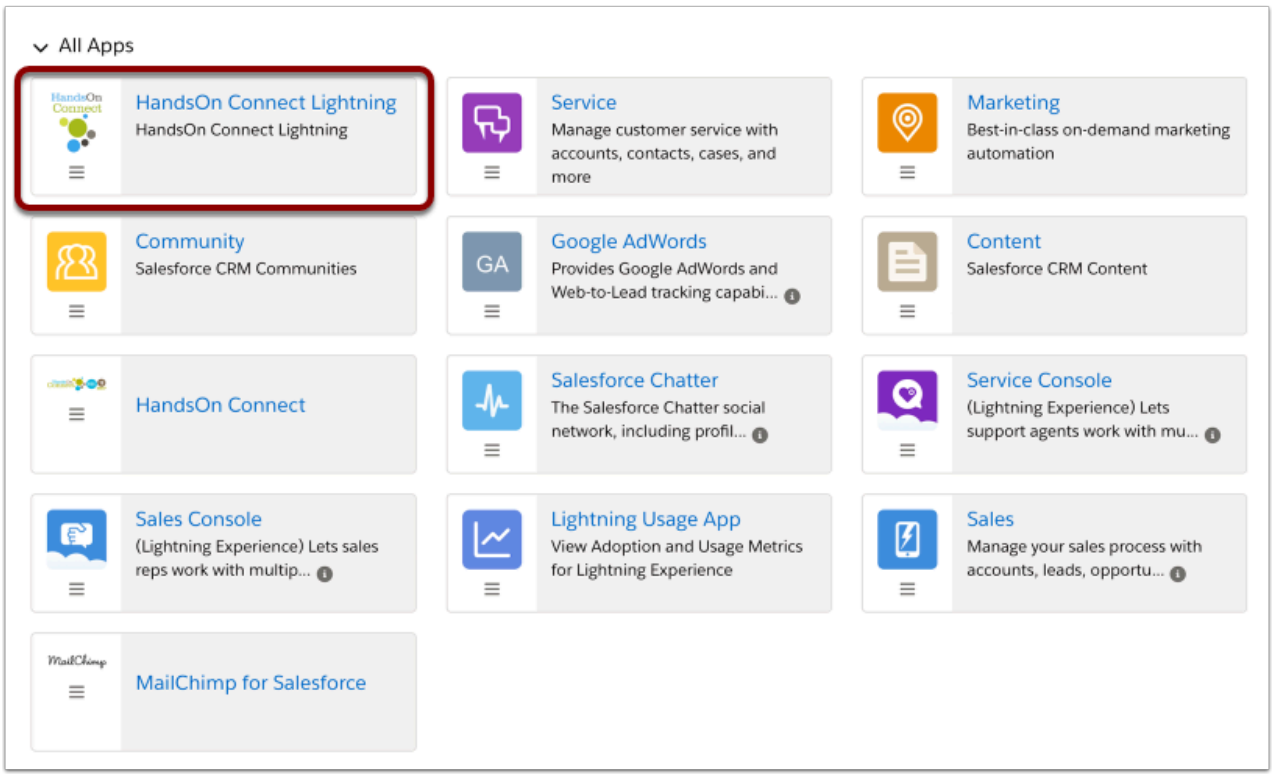


You'll now be able to see HandsOn Connect Lightning in the first position of the App Switcher.

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)

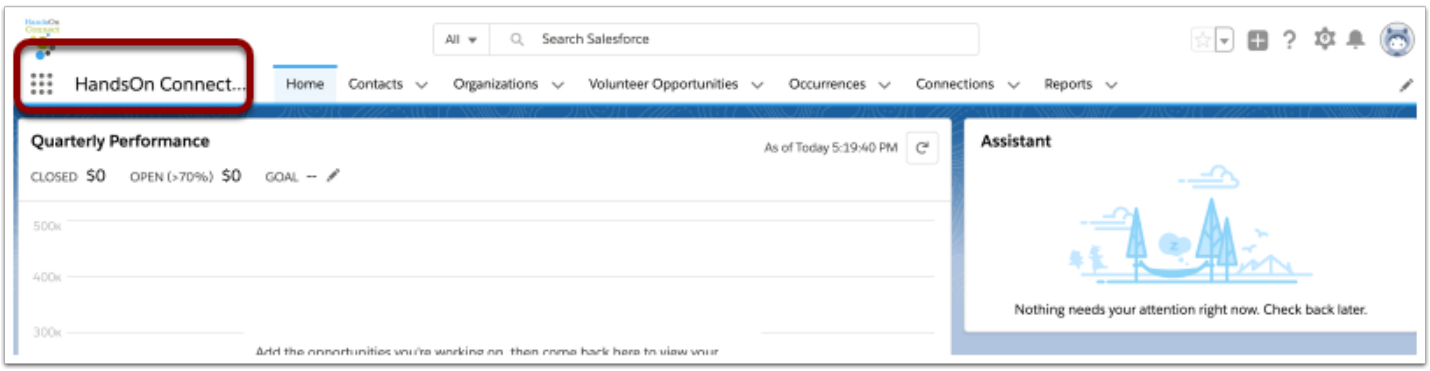


Note: If HandsOn Connect Lightning is not the principal application your users will be using, you can set the order however you like. Remember though, that individual users can change the default order at any time for themselves by dragging the cards from one position to another :-). All you've done 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 that the lightning default homepage.

[Click here to learn about customizing the home page](#).

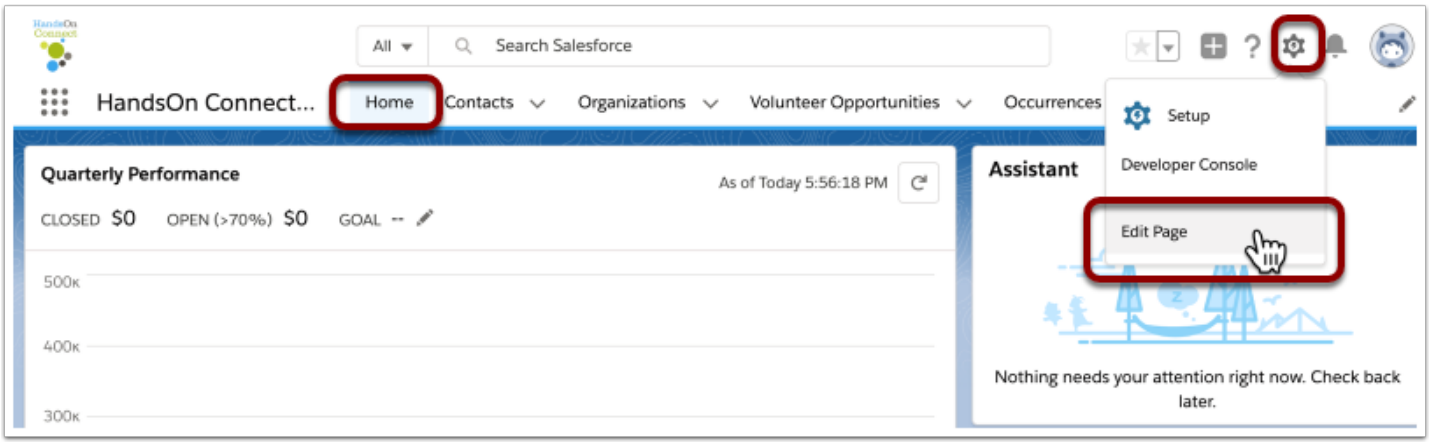
Configuring HandsOn Connect Lightning (Pt 1) Home Page

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.

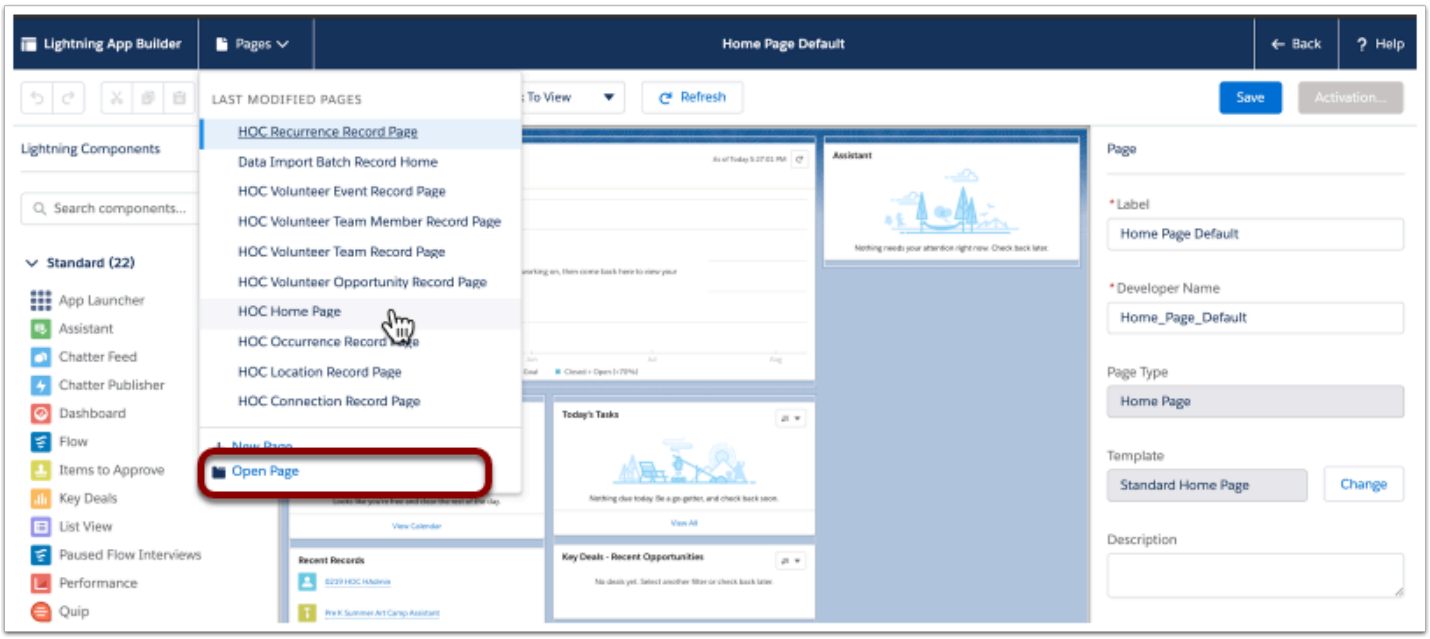
Customize and Assign the HandsOn Connect Home Page as your default Home Page:

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.

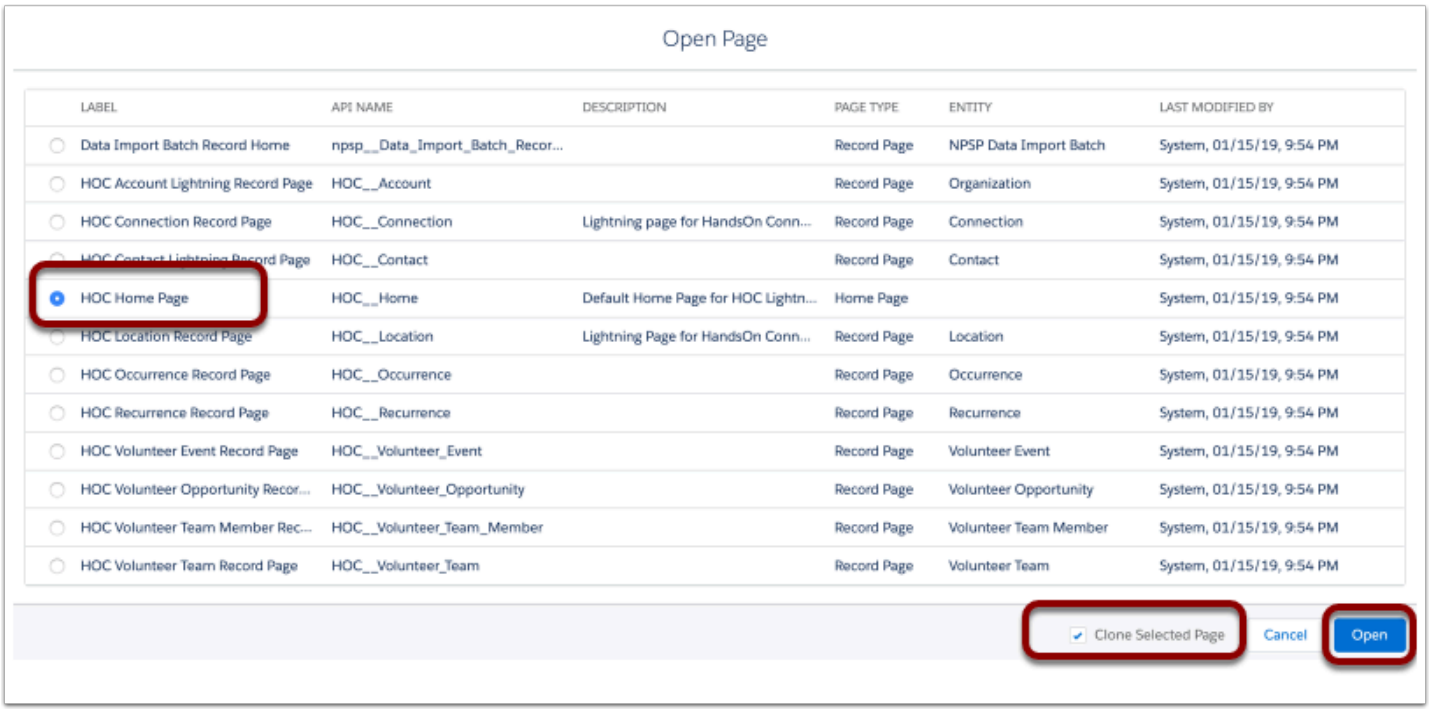
(You'll be asked "Are you sure you want to navigate away from this page? You'll lose any unsaved changes". That's OK, because we don't care about this default home page we were seeing. Click **Confirm.**



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"



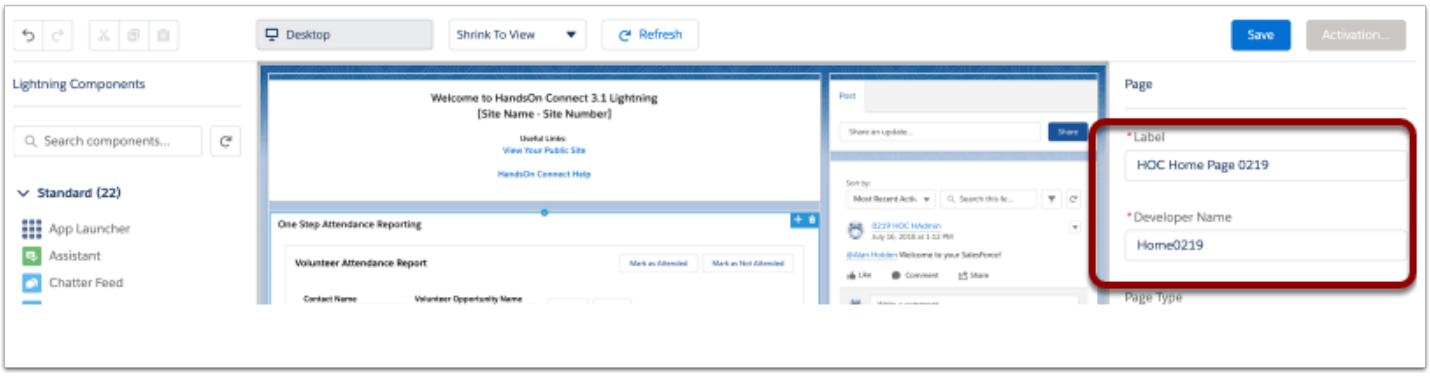
Editing the Cloned Home Page

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.

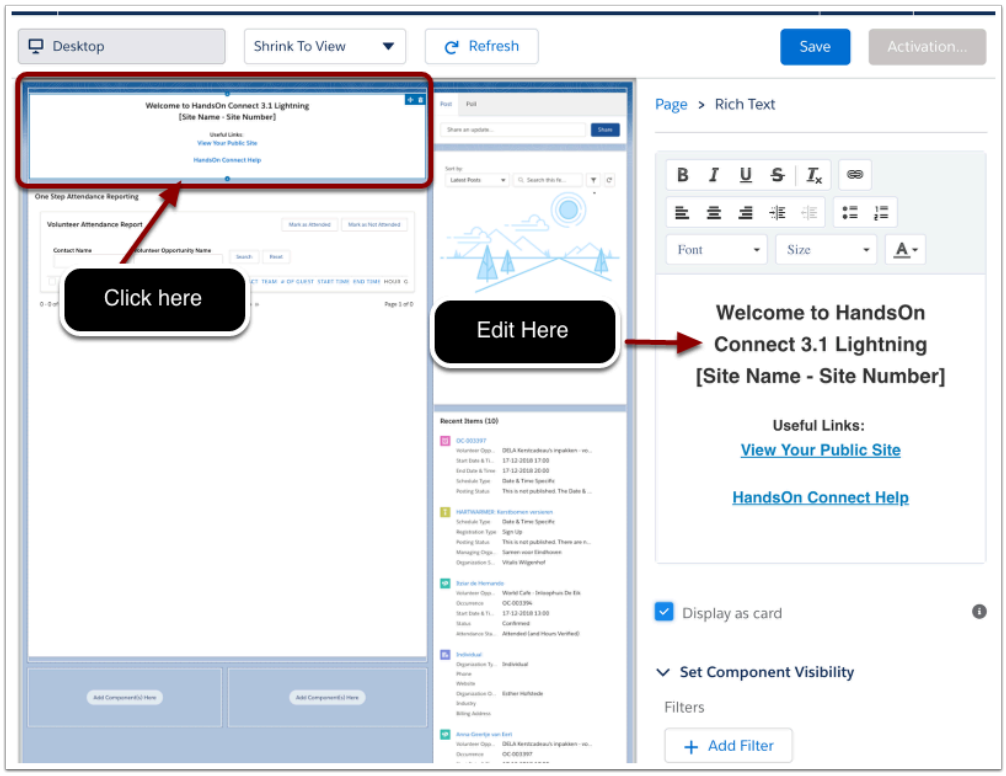
Adding your client number helps us when we're doing support for you as we know what instance of Salesforce we're in.

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:



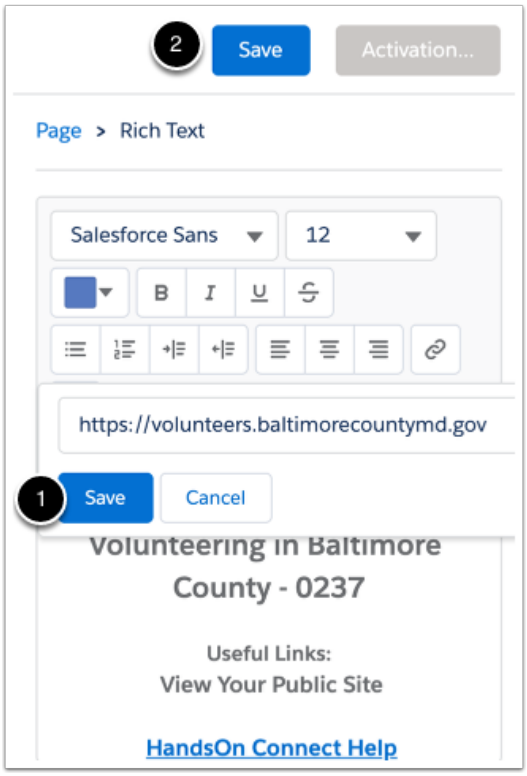
Make the following Edits to the Page:

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

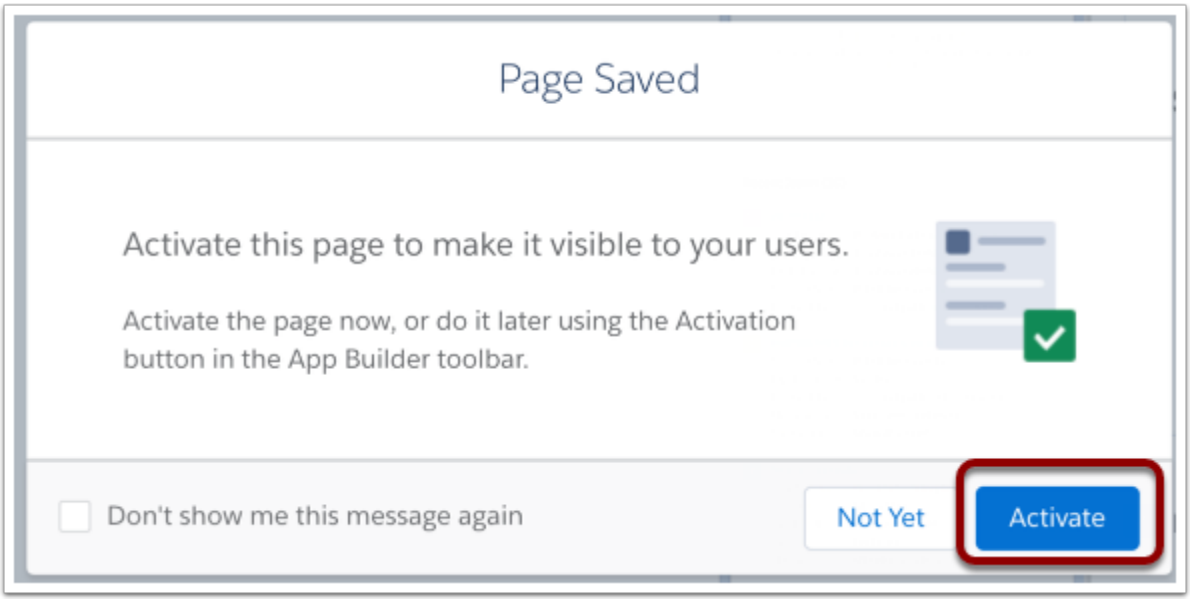
3) Select the text / link "View Your Public Site" - and using the WYSIWYG editor link it to the URL of your public site. (Click on the link icon and edit the site URL). This makes it easy for your users to quickly get to the public site :-). Don't forget to set it to https://

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.



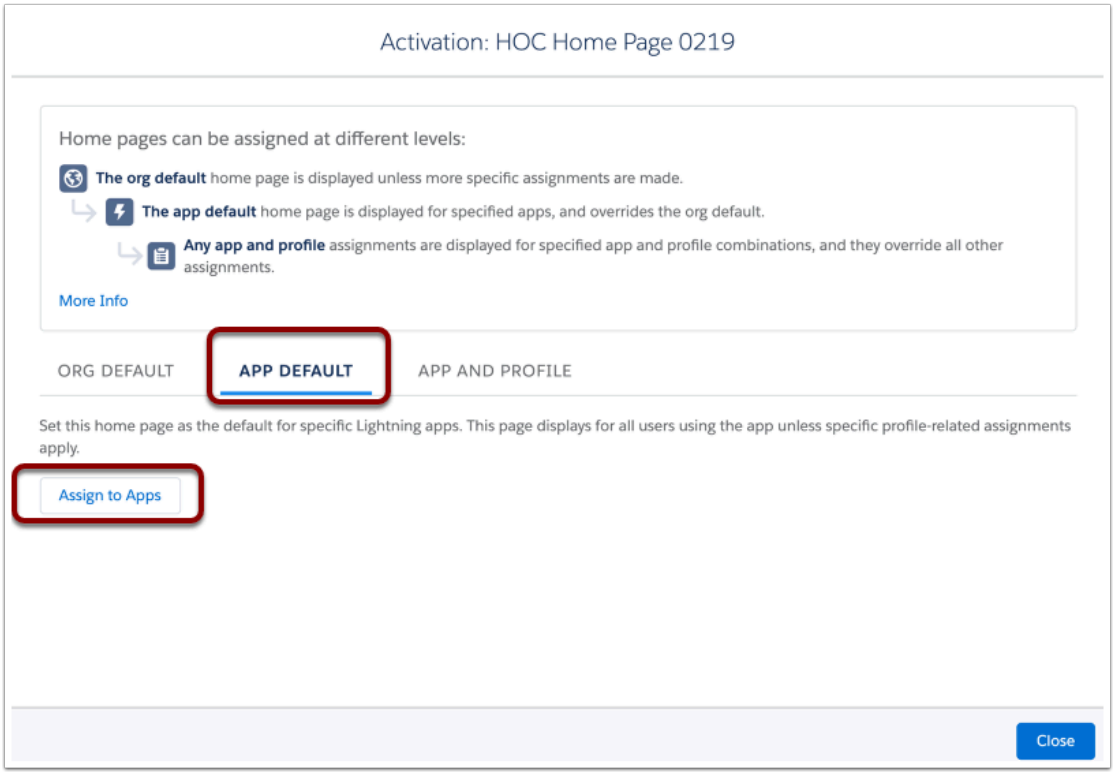
You now have the option to make this page either:

1) The organization default. (Select this if its the only lightning app you'll be using for your organization

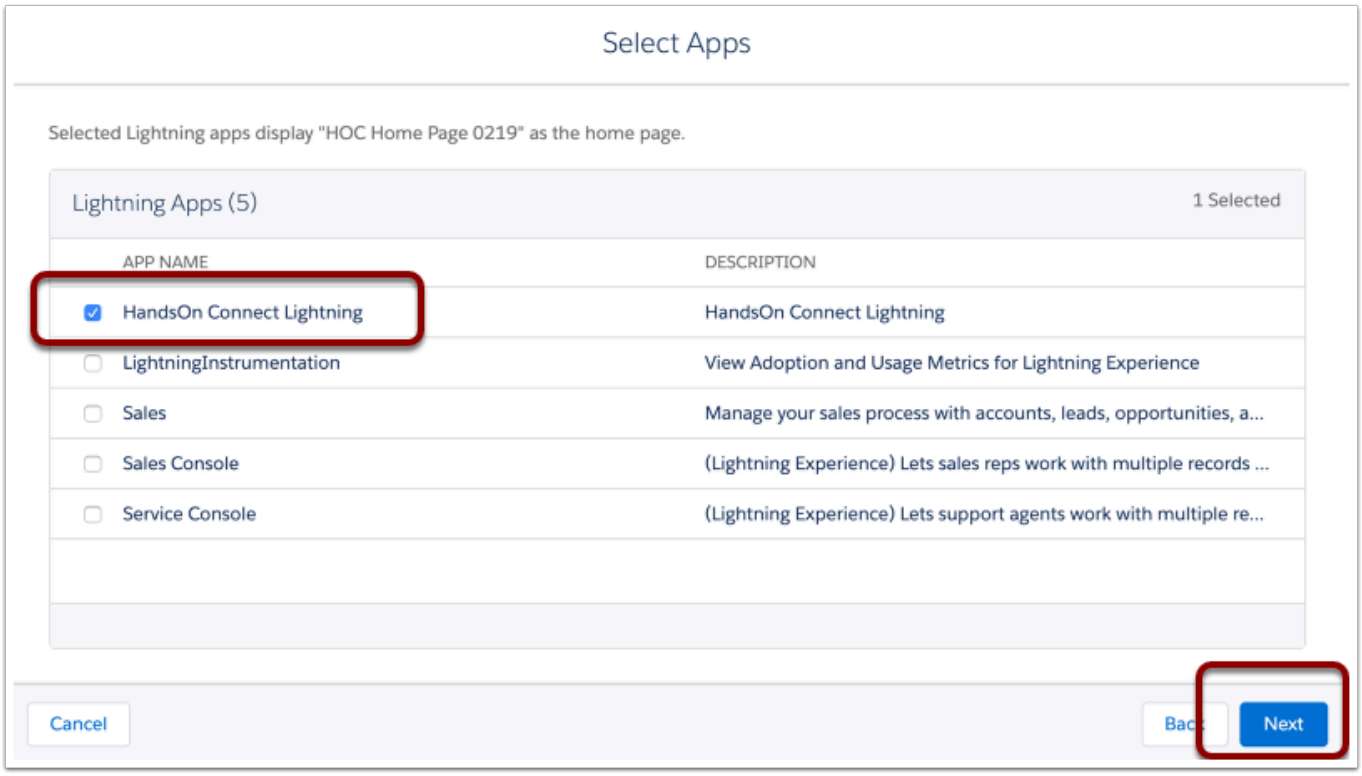
2) The App Default. (We recommend this choice. As it'll make this the home page when using HandsOn Connect Lightning.

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"

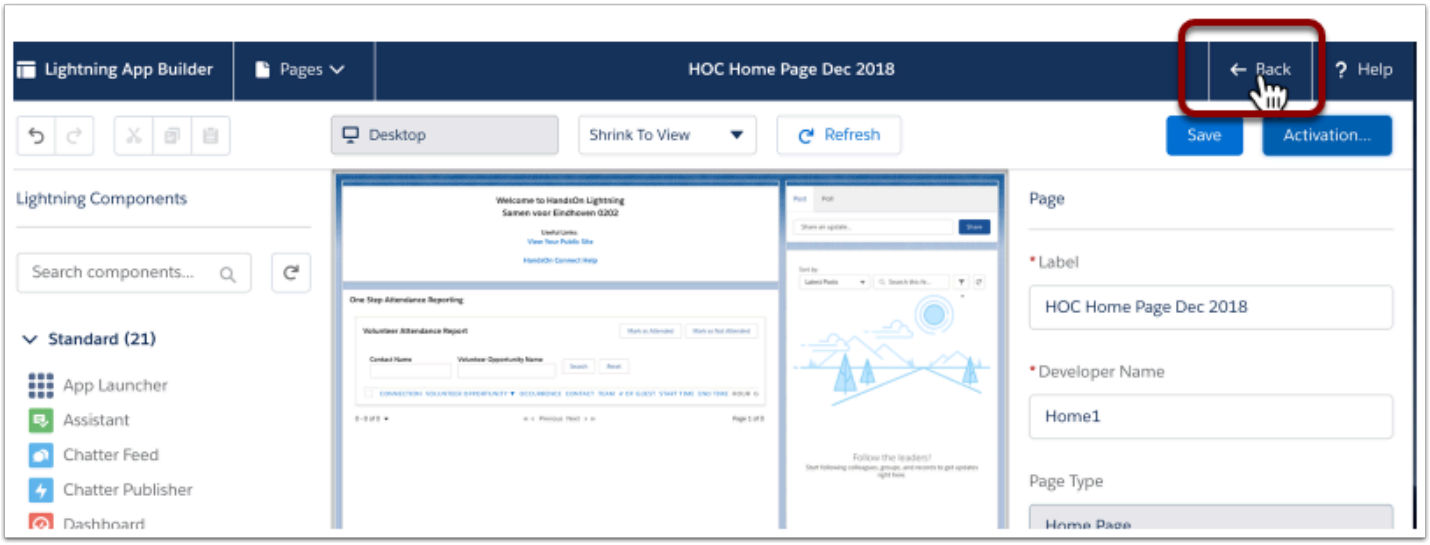


You'll see a list of all lightning apps. Select "HandsOn Connect Lightning" as the app you wish to use this home page for. (You can optionally assign this page to any other app as well). Click Next



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.



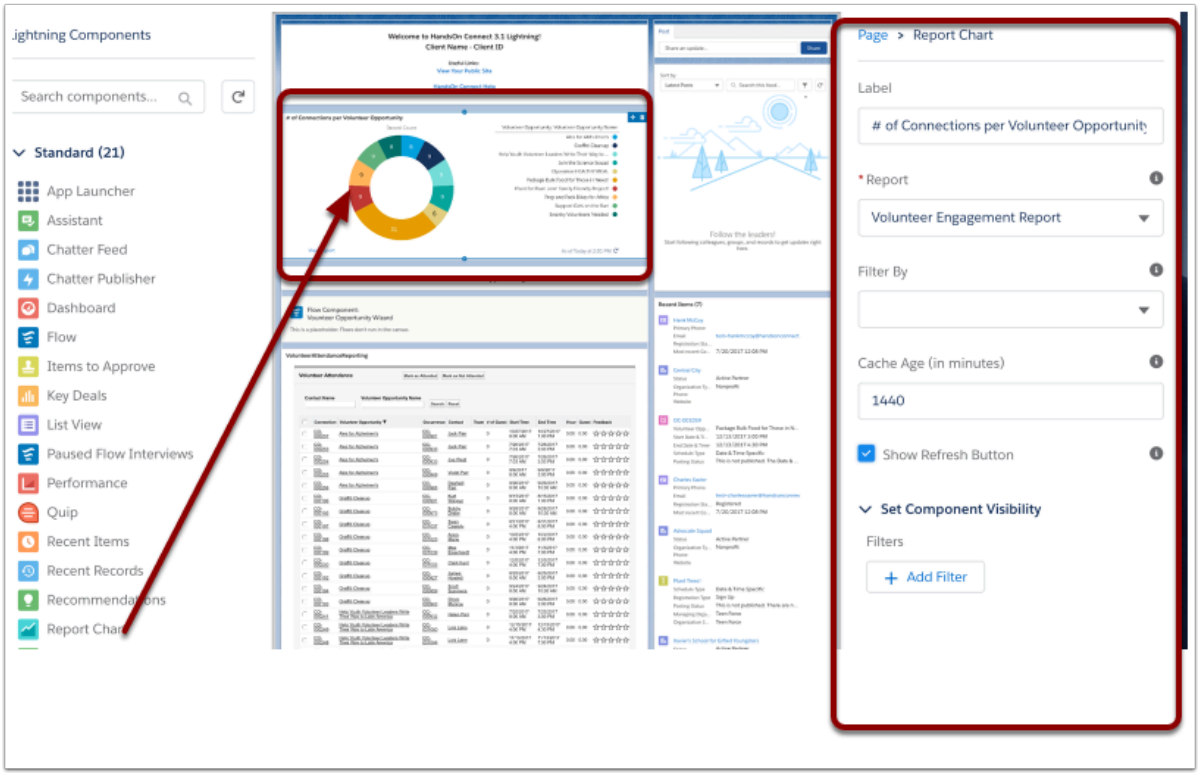
(Optional) You can continue to edit or add to your home page as desired:

Now that you have your own version of the HOC Home Page - you can always edit it and add additional components.

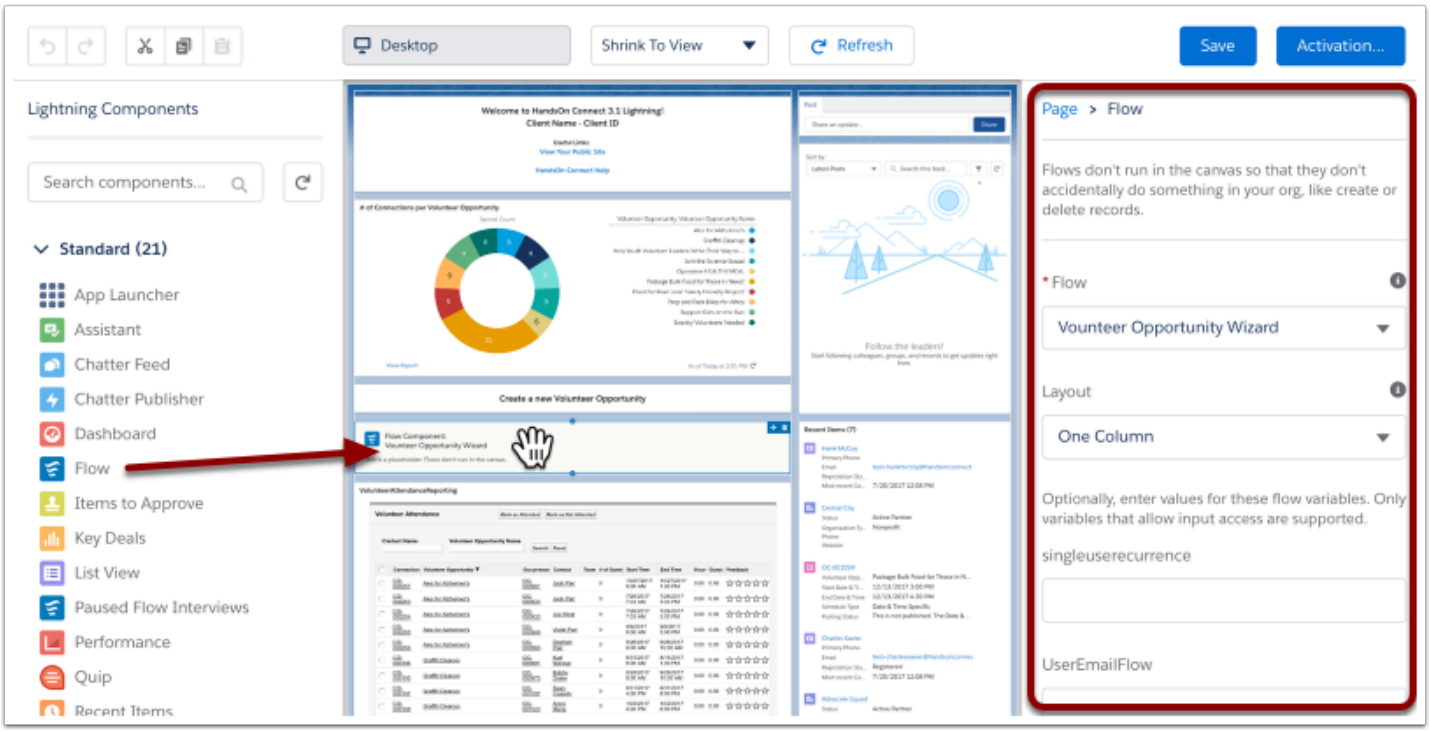
We've started you out by putting the "One Step Attendance Reporting": Visualforce component on the home page.

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



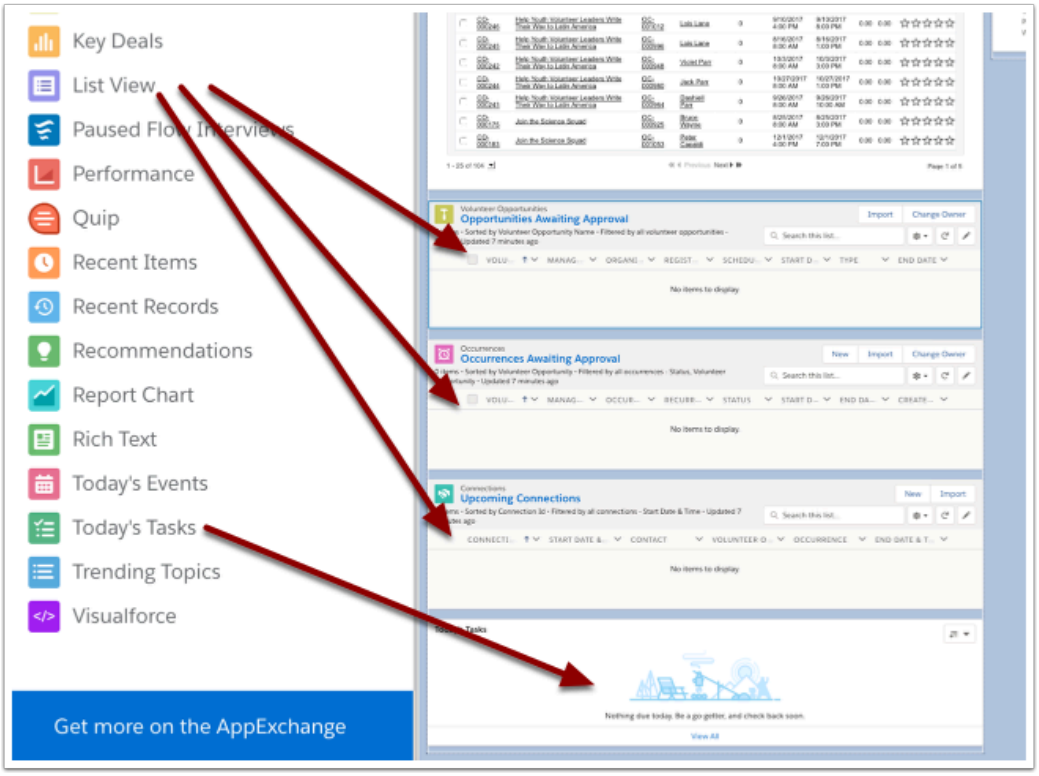
2) You can add other frequently used items like the Volunteer Opportunity Wizard. (Use the lightning component "Flow" and choose the flow "Volunteer Opportunity Wizard:"



Add useful 'list views' to the home page:

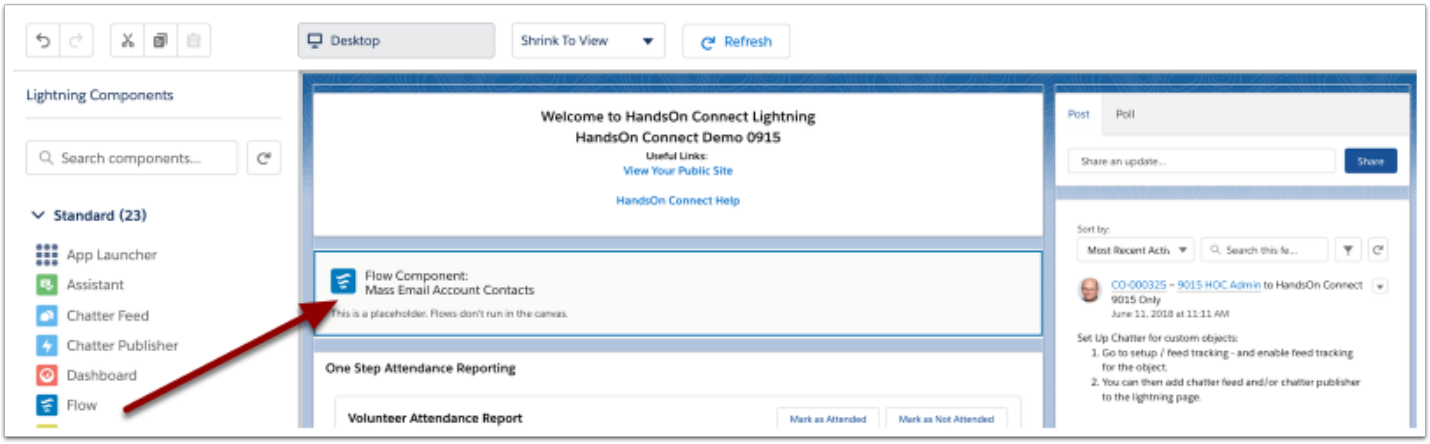
Examples: Opportunities Awaiting Approval, Occurrences Awaiting Approval, Upcoming Connections, ...

Use Tasks? Add the "Today's Tasks" component!

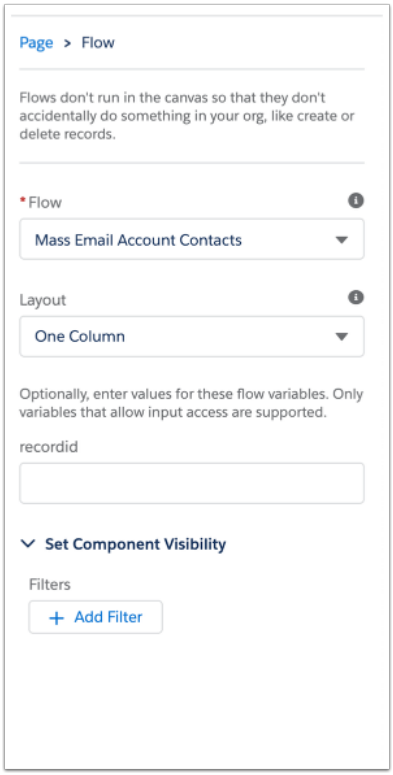


Optional: If you choose to add the Volunteer Opportunity Wizard to the Home Page -- it does take a little bit of configuration. Here's how:

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"

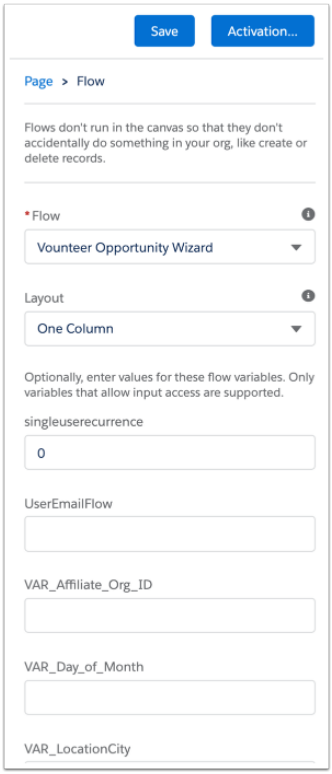
Scroll to the bottom and In the Flow variables set singleusereccurrence = 0

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



(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!

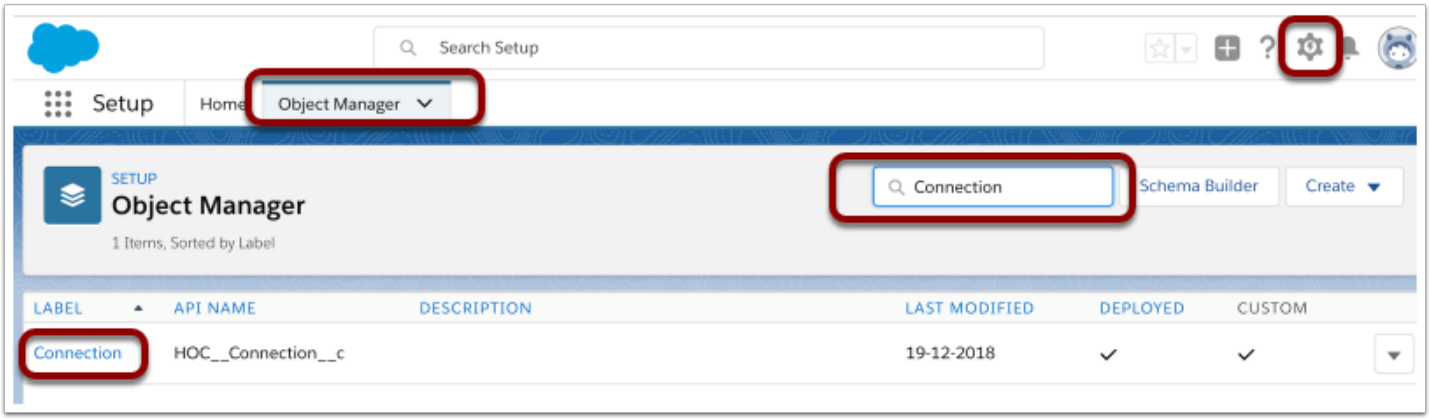
How to assign new page layouts

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:

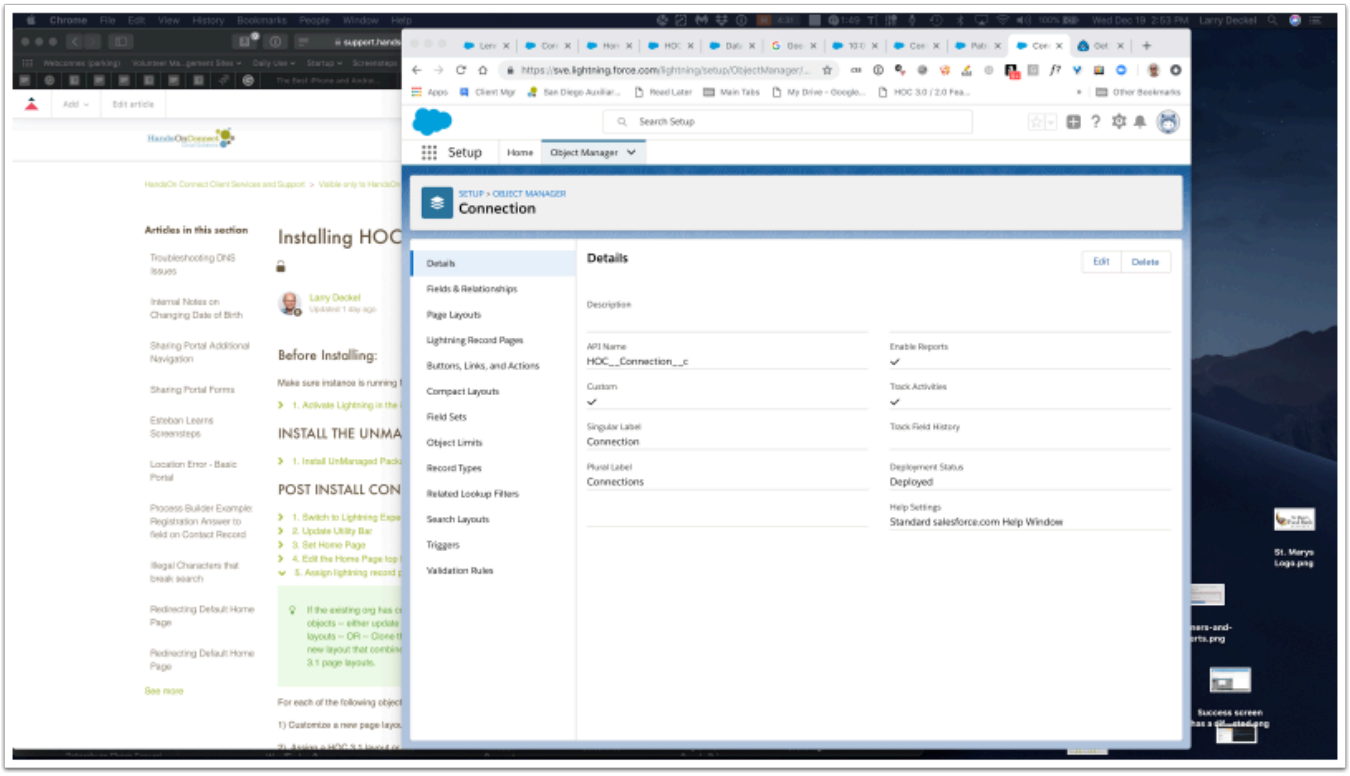
Click on Object Manager Tab. (FYI - the "Home Tab" in setup gets you to all the other setup items.

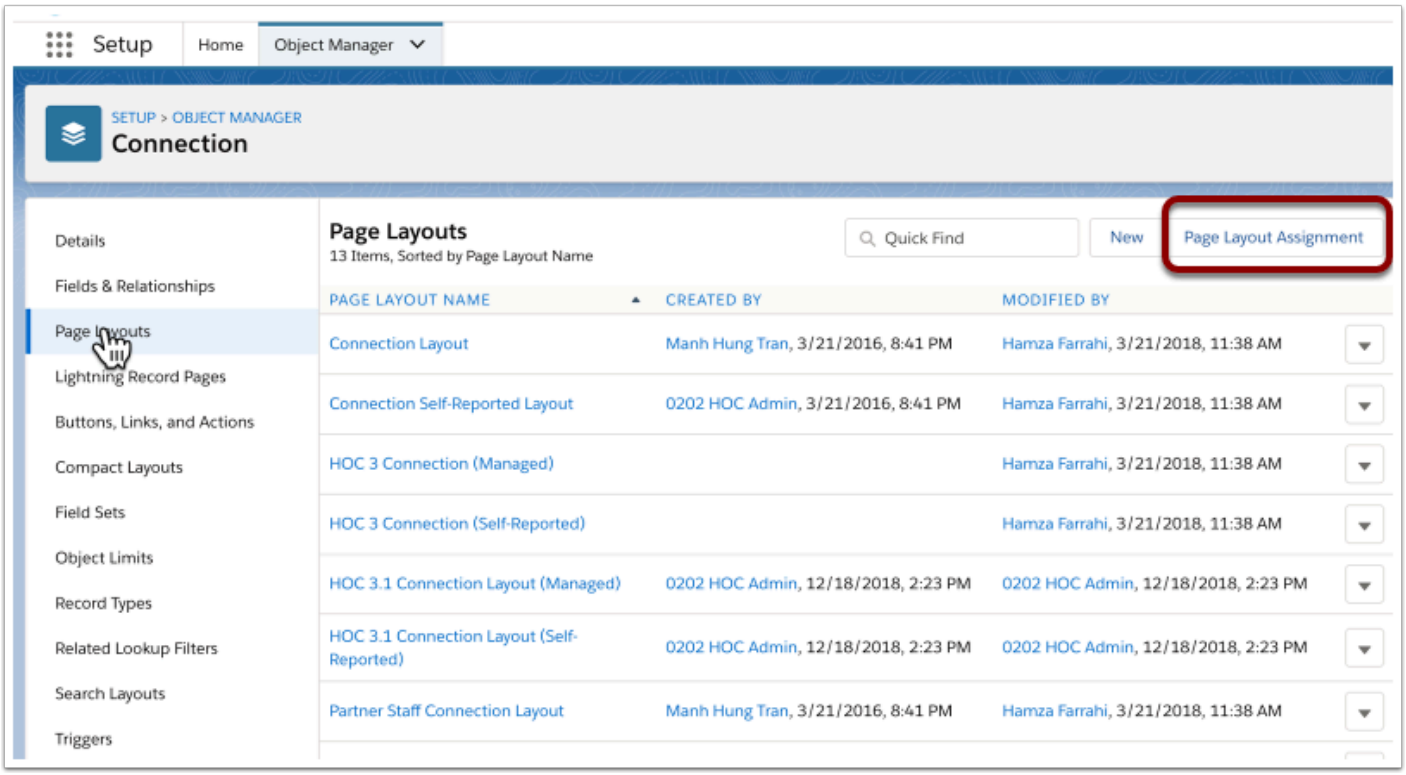
Either scroll and find the object you want to work with,, or type its name in the quick search box.

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).

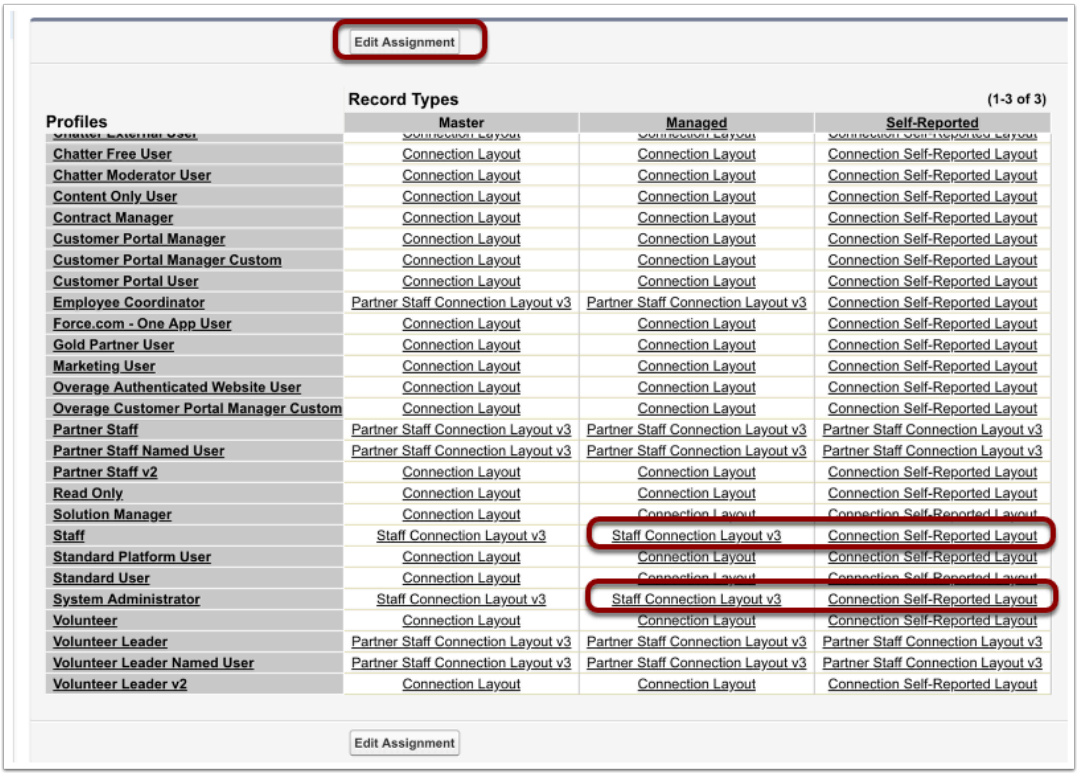
The New Page Layouts we've made available are labeled "HOC 3.1....."

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 se 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:



Edit Assignment

Profiles	Record Types (1-3 of 3) 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

Edit Assignment

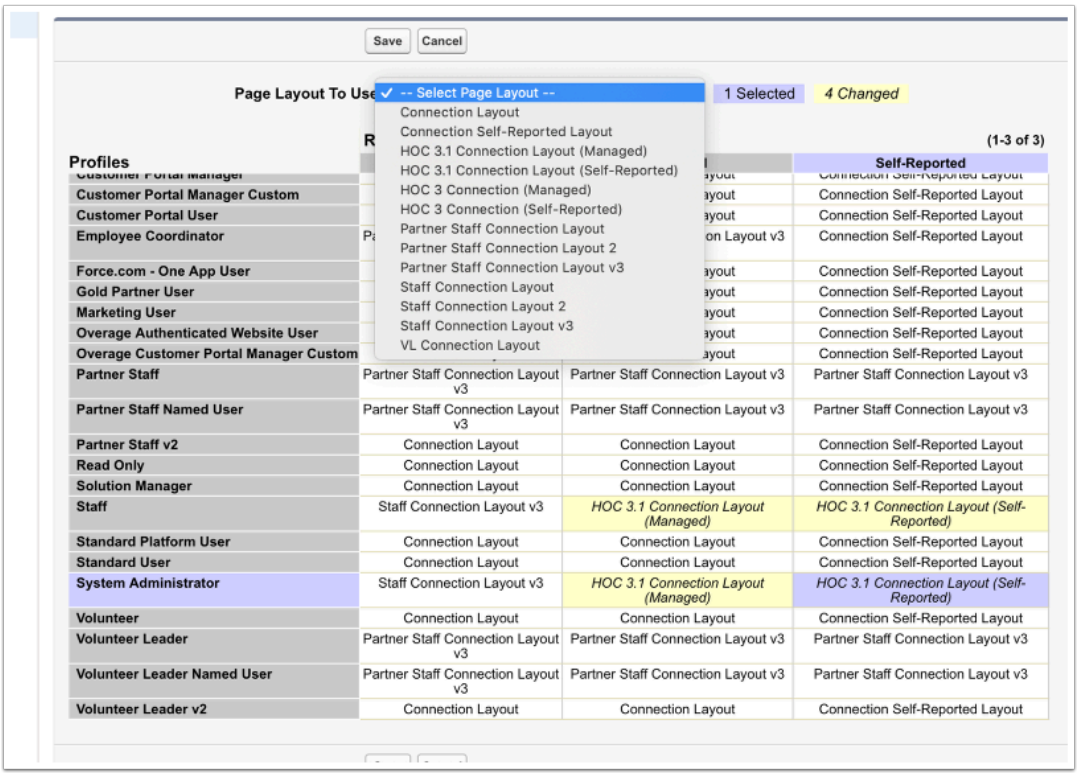
To update the page layout - click on the profile and page layout and then use the picklist to replace it with the new page layout.

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.

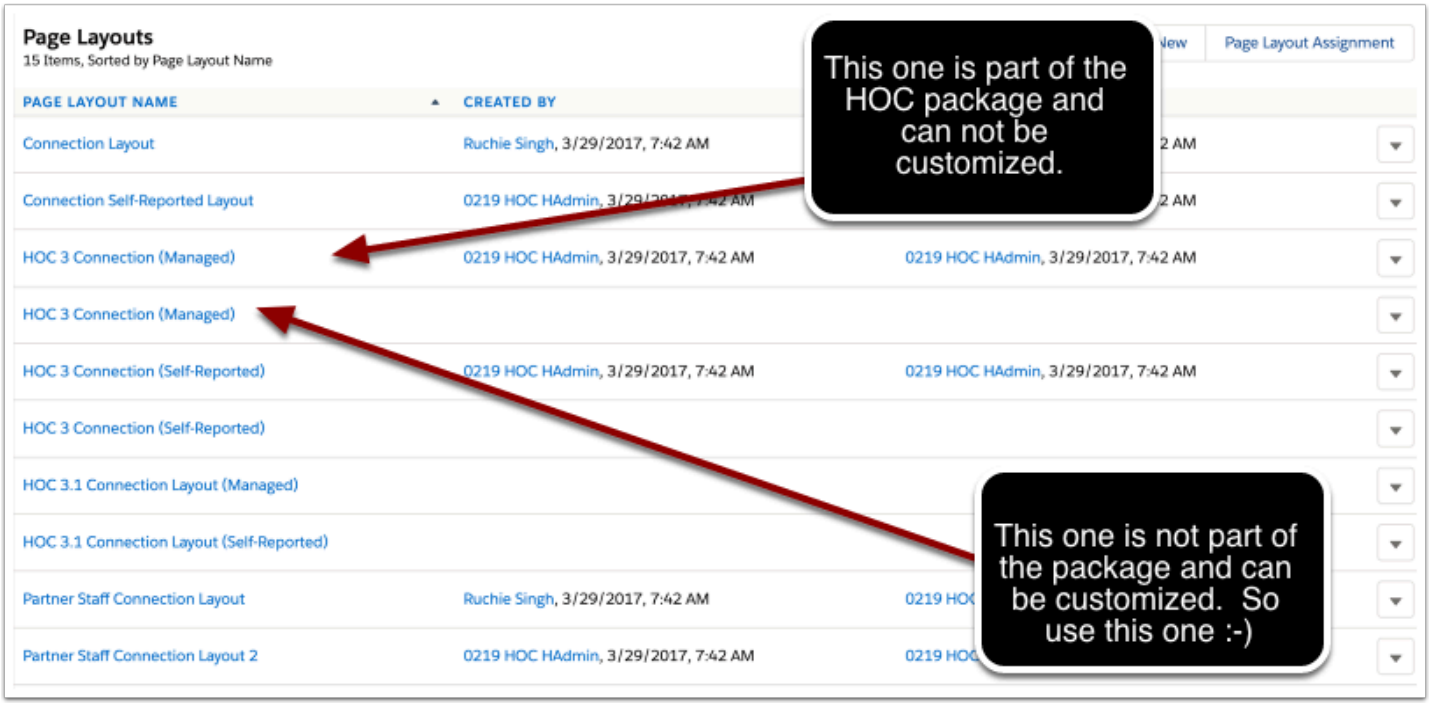
OR - you can compare the new layouts to your older, customized layouts, and update either to create the page layout that works best for your organization.

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!



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?

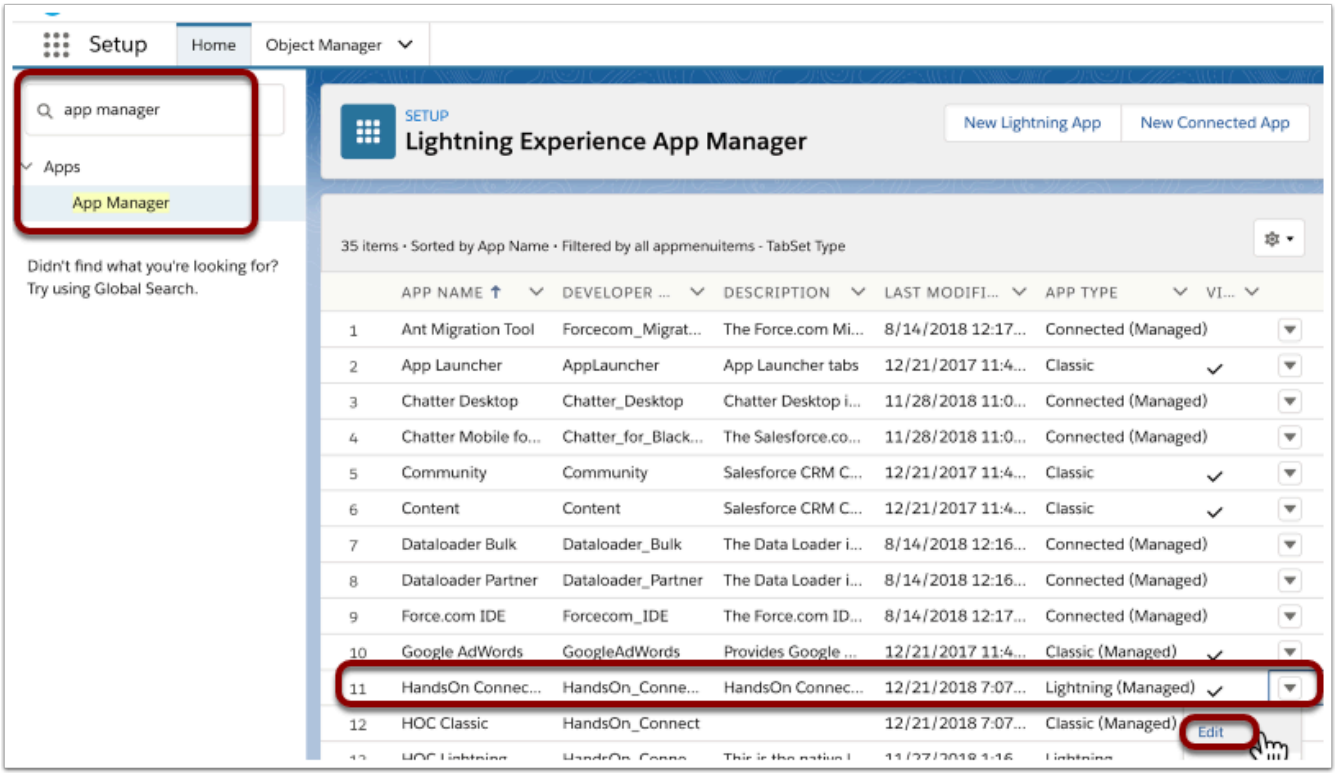
Come to one of our daily scheduled labs and we can help you configure and set up lightning

(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

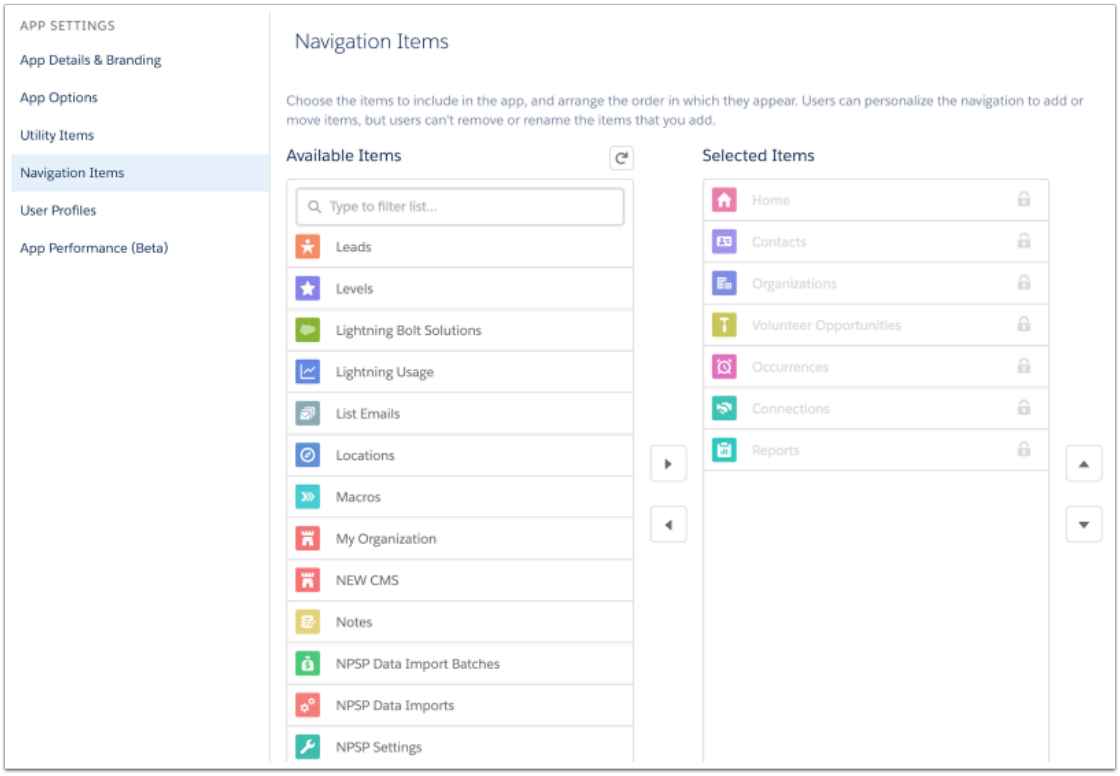


Select "Navigation Items" where you'll see the default Tabs that are available for all users:

- 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.

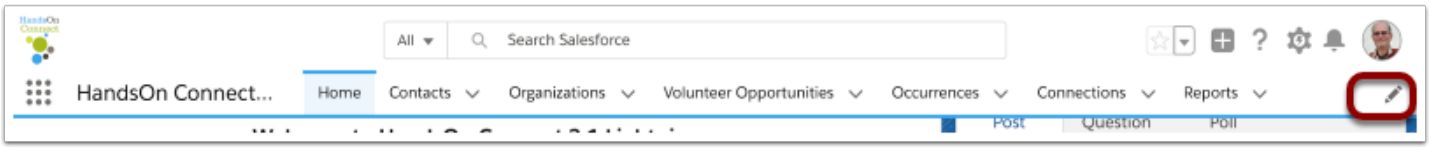
Note: Items added it this way will not be removable by users, they are now part of the app for anyone using it.



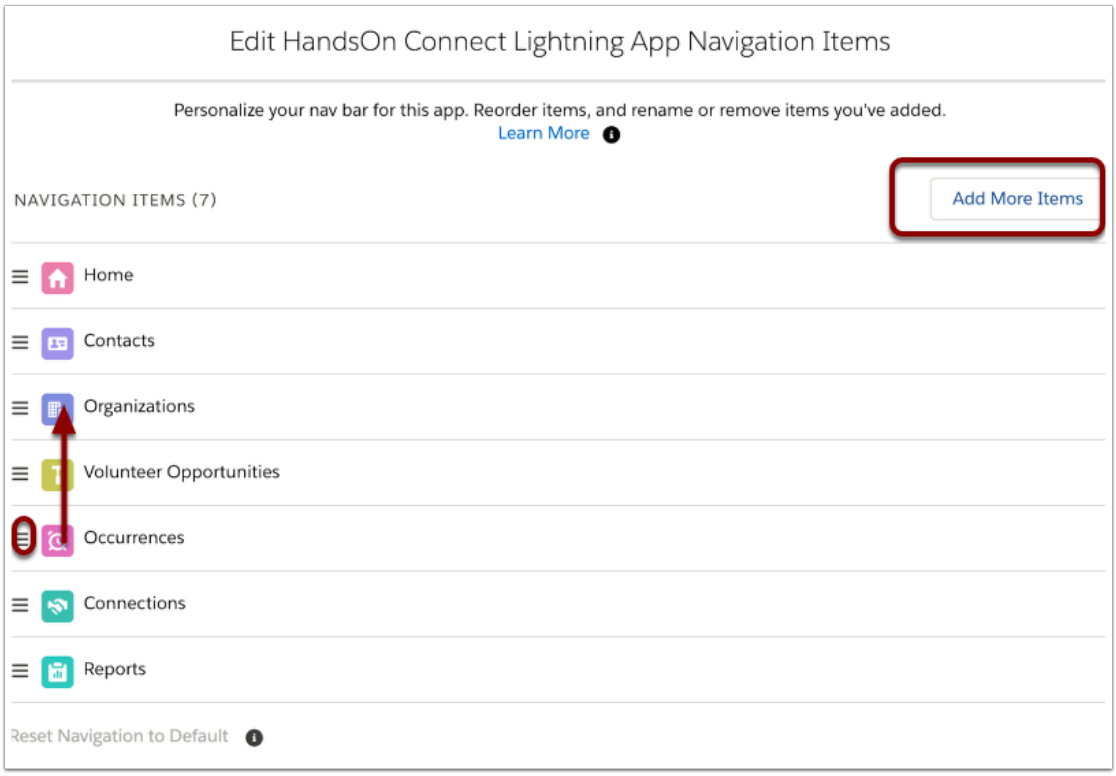
(Option 2) Advise your users to add their own navigation items based on how they use HandsOn Connect.

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.