

DATA MANAGEMENT FOR SALESFORCE ADMINISTRATORS

Table of Contents

Data Basics	4
Company Information: Monitoring your license usage and data storage	5
Understanding record IDs.....	8
Archiving your data - Weekly Export Service	13
Avoiding Duplicate Records - Merging Contacts and Organizations	16
Merge Duplicate Organization Records	17
Merge Duplicate Contact Records	21
The hazards of deleting data.....	25
Deleting Records	26
"My public site no longer works": What can happen if you delete records that are required fields in other records.	28
If you MUST delete data - it needs to be done with care.	33
How to Manage the Recycle Bin.....	37
Simple Data Updates using Views	39
Using Views to update records.....	40
Using views to update organizations, contacts and connections	45
Importing Data	49
Importing Contacts in Salesforce	50
Formatting Zip Code and Date / Time fields for importing into Salesforce.....	53
Updating Data	58
Updating Data: General Overview	59
Updating Data Example: Updating the Organization Name for Contacts	63
Updating Occurrences Date & Time - Using the Import Wizard	73
Advanced Data Management Tools for HandsOn Connect.....	82
Advanced Data Management Tools - overview	83
Turning a list of new contacts into a team and signing them up administratively. (Batch creation 101).....	84
(Advanced) Batch Creating Team Members	97
Batch Creating Connections	101
Batch Moving or Copying of Connections from an Occurrence.....	105

Adding occurrence connections to a campaign	107
Other Examples of updating record	109
Populating Impact Area (Local) for Volunteer Opportunities using the data loader	110
Updating Volunteer Opportunity and Occurrence Status	119
Updating Opportunity Coordinator	129
(Advanced) Using the Apex Data Loader	135
Getting Started with the Apex Data Loader	136
Exporting Records using the Apex Data Loader	140
Importing Occurrences via the Data Loader	146
Batch updating Opportunity Approval and Volunteer Leader Approval Managers using the Apex Data Loader	152
Importing Notes to Organization and Contact Records using the Apex Data Loader	160
Uploading Users into HandsOn Connect Using the Apex Data Loader	170
Bulk Uploading Connections with the Apex Data Loader	175
Importing Volunteer Opportunities via the Data Loader	181
(Advanced) Data Management	190
How to Fix: Available Opportunities Found- Showing Incorrect Values	191
Data Table Templates for HandsOn Connect	199

Data Basics

Company Information: Monitoring your license usage and data storage

Your nonprofit edition of Salesforce / HandsOn Connect comes with a set number of licenses, logins, and data storage. Here's how to monitor your usage (and predict if you will be incurring extra charges from Salesforce for going over. Its recommended that System Administrators keep an eye on this information to anticipate if you are exceeding limits and incurring extra costs from Salesforce.

Setup / Admin Setup / Company Profile / Company Information

Organization Detail
[Edit](#)

Organization Name	HandsOn Connect Demo	Phone	(209) 378-1234
Primary Contact	Larry Decker	Fax	
Division		Default Locale	English (United States)
Address	6321 Rhodes Lane Riverside, CA 92506 US	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-04:00) Eastern Daylight Time (America/New_York)
Newsletter	<input type="checkbox"/>	Currency Locale	English (United States)
Admin Newsletter	<input type="checkbox"/>	Used Data Space	418.8 MB (41%) View
Hide Notices About System Maintenance	<input type="checkbox"/>	Used File Space	22.1 MB (0%) View
Hide Notices About System Downtime	<input type="checkbox"/>	API Requests, Last 24 Hours	0 (25,000 max)
		Restricted Logins, Current Month	0 (0 max)
		Salesforce.com Organization ID	00DA0000000aAsx
Created By	Sally Staff, 7/8/2010 6:33 PM	Modified By	Larry Decker, 7/20/2011 10:45 AM

[Edit](#)

User Licenses
[User Licenses Help](#)

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Monthly Logins Allotted	Monthly Logins Used	Expiration Date
Overage Customer Portal Manager Standard	Active	20,000	0	20,000	2,000	0	
Overage Authenticated Website	Active	100,000	214	99,786	5,000	206	
Overage Customer Portal Manager Custom	Active	500	61	439	500	71	
Salesforce	Active	10	9	1	Not Applicable	Not Applicable	
Guest User License	Active	25	1	24	Not Applicable	Not Applicable	
Chatter Free	Active	5,000	1	4,999	Not Applicable	Not Applicable	

Feature Licenses
[Feature Licenses Help](#)

Feature Type	Status	Total Licenses	Used Licenses	Remaining Licenses
Marketing User	Active	10	3	7
Offline User	Active	10	0	10
Salesforce CRM Content User	Active	10	0	10

Setup / Admin Setup / Company Profile / Company Information gets you to your company profile.

Make sure the following is correct:

- Organization Name (the name of your volunteer program as it appears on the website -- NOT your parent organization)
- Address

- Phone Number (in a readable format. Avoid 3231231234 and use 323-123-1234 or (323) 123-1234. It will be used on pages in the system exactly as it appears here.
- Make sure your default time zone is correct.

User Licenses

1) Here you'll see a summary of your license information. You'll see how many licenses you have, how many you've used, and how many remain. It will also show you how many monthly logins are allocated to the portal licenses, and how many have been used for the month.

Data Storage

2) Here you'll see your used data and file space and what percentage of capacity you've reached. Clicking on "View" will take you to **Setup / Data Management / Storage Usage** where you'll see the detailed view of your data storage as illustrated below.

The Storage Usage view:

Storage Usage Help for this Page

Your organization's storage usage is listed below.

Storage Type	Limit	Used	Percent Used
Data Storage	1.0 GB	281.1 MB	27%
File Storage	6.0 GB	460 KB	0%

Current Data Storage Usage

Record Type	Record Count	Storage	Percent
ZipCodes	42,036	82.1 MB	29%
Connections	34,970	68.3 MB	24%
Contacts	22,882	44.7 MB	16%
Volunteer Team Members	22,522	44.0 MB	16%
Occurrences	8,073	15.6 MB	6%
Locations	4,206	8.2 MB	3%
Volunteer Teams	4,044	7.9 MB	3%
Accounts	3,442	6.7 MB	2%
Volunteer Opportunities	1,486	2.9 MB	1%
Skills	186	372 KB	0%
Volunteer Events	41	82 KB	0%
Links	17	34 KB	0%
Tasks	9	18 KB	0%
Labels	4	8 KB	0%
Feed Tracked Changes	26	7 KB	0%
Recurrences	3	6 KB	0%
Events	2	4 KB	0%
Skill Ratings	1	2 KB	0%
Other Settings	1	2 KB	0%
VL Access	1	2 KB	0%
Questions	1	2 KB	0%
Associations	1	2 KB	0%
Feed Comments	4	1 KB	0%
Feed Posts	3	768 B	0%
Photos	8	0 B	0%

Current File Storage Usage

Record Type	Record Count	Storage	Percent
Documents	45	396 KB	86%
Photos	8	64 KB	14%

Top Users by Data Storage Usage

User	Storage	Percent
HandsOn Connect Admin 0025	168.6 MB	60%

Here you can see how much data you've been allocated, and how much you've used. You can see the percentage of your total space that is used.

1- Data Storage= This is the total based on the number of records in the different objects.

2- File Storage= This is the total based on the number of items in the Documents and webpages.

3- Lists the total number of records by object and shows what percentage of the Data Storage it accounts for.

This page also includes information on WHO in your organization is using the space (so you can weed out staff members who are storing too many files!), which files are taking up the most space, which data types are taking up the most space, total numbers of records, and more. The above illustration just shows PART of the detailed information that is available here which can help you keep your data and storage pruned to avoid extra charges.

Top Users by Data Storage Usage		
User	Storage	Percent
HandsOn Connect Admin 9999	230.3 MB	55%
Larry Deckel	5.5 MB	1%
HandsOn Connect Demo (Training) Demo & Training	2.0 MB	0%
Art Ordoqui	1.2 MB	0%
Client Administrator	684 KB	0%
Sally Staff	472 KB	0%
Rana Woodhull	372 KB	0%
Alex Atwood	242 KB	0%
Michelle Ciemona	228 KB	0%
Art Partner	220 KB	0%
Davis Kirby	146 KB	0%
Valerie Volunteer	142 KB	0%
Art Trout	136 KB	0%
Allie Einsiedel	122 KB	0%
Kate Potter	116 KB	0%
Dominic Carubba	94 KB	0%
Stephen Ponzillo	94 KB	0%
Tonya Cunningham	90 KB	0%
Tara Smith	86 KB	0%

Top Users by File Storage Usage		
User	Storage	Percent
Art Ordoqui	6.6 MB	30%
HandsOn Connect Demo (Training) Demo & Training	6.6 MB	30%
Larry Deckel	4.1 MB	18%
Davis Kirby	2.2 MB	10%
Always Allison	1.7 MB	8%
Client Administrator	257 KB	1%
Gina Simpson	220 KB	1%
sallim dooma	46 KB	0%
HandsOn Connect Admin 9999	40 KB	0%
Robert Boylan	38 KB	0%
Stefan Skills	38 KB	0%
Paige Van Ripar	35 KB	0%
Davis Kirby	31 KB	0%
Zach Spiller	24 KB	0%
Lenny Leader	23 KB	0%

Understanding record IDs

Record IDs serve as a definitive way of differentiating one record from another.

There are lots of John Smiths in America -- but we can tell them apart because each of them has a different social security number.

The records in Salesforce each have unique IDs as well. We need these so we can update data without accidentally updating the wrong record!

Where it can get confusing in HandsOn Connect is because our database uses a variety of different IDs. So let's talk about which is which and what they are used for!

A sample report showing four different types of ID's for the Connections Record!



Occurrence with Connections and Volunteer Opportunities Report

Report Generation Status: Note: 2,000 of 52,632 records are displayed below. Select Export Details for a complete view of your data.

Report Options:

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

Time Frame

Date Field
End Date & Time
Range
Custom
From
To

Run Report
Hide Details
Customize
Save As
Printable View
Export Details

Connection: ID	Connection: Connection Id	HOC ID	Import ID
a08A000000C3xdF	CO-394264	00DA000000a2D3CO394265	HCO2-955959-1284326
a08A000000C3xdG	CO-394265	00DA000000a2D3CO394266	HCO2-908819-1167694
a08A000000C3xdH	CO-394266	00DA000000a2D3CO394267	HCO2-976035-1282988
a08A000000C3xdI	CO-394267	00DA000000a2D3CO394268	HCO2-972080-1288133
a08A000000C3xdJ	CO-394268	00DA000000a2D3CO394269	HCO2-964139-1279441
a08A000000C3xdK	CO-394269	00DA000000a2D3CO394270	HCO2-964137-1279441
a08A000000C3xdL	CO-394270	00DA000000a2D3CO394271	HCO2-934807-990133
a08A000000C3xdM	CO-394271	00DA000000a2D3CO394272	HCO2-922386-1153517
a08A000000C3xdN	CO-394272	00DA000000a2D3CO394273	HCO2-948460-1144328
a08A000000C3xdO	CO-394273	00DA000000a2D3CO394274	HCO2-976949-1291891
a08A000000C3xdP	CO-394274	00DA000000a2D3CO394275	HCO2-973228-1291891
a08A000000C3xdQ	CO-394275	00DA000000a2D3CO394276	HCO2-899487-1117834
a08A000000C3xdR	CO-394276	00DA000000a2D3CO394277	HCO2-908864-975581
a08A000000C3xdS	CO-394277	00DA000000a2D3CO394278	HCO2-808864-1288708

When we look for the term ID in a connections report-- we'll see there are actually four different IDs that are available!

- Connection: ID
- Connection: Connection ID
- HOC ID

- Import ID

They each have different functions.

Connection ID -- is the Salesforce.com ID for a record. (In this case, a "connection record")

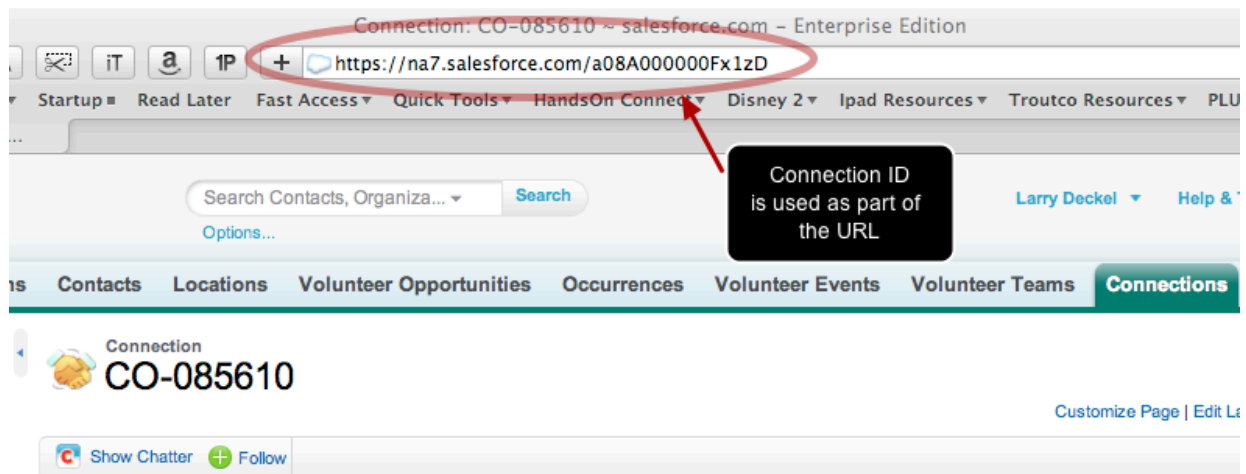
Connection Id	Connection ID	HOC ID
CO-085610	a08A000000Fx1zD	00DA0000000aAsxCO85611
CO-085611	a08A000000Fx1zE	00DA0000000aAsxCO85612
CO-085612	a08A000000Fx1zF	00DA0000000aAsxCO85613
CO-085613	a08A000000Fx1zG	00DA0000000aAsxCO85614
CO-085614	a08A000000Fx2sb	00DA0000000aAsxCO85615
CO-085615	a08A000000FxEtp	00DA0000000aAsxCO85616
CO-085616	a08A000000FxLPN	00DA0000000aAsxCO85617
CO-085617	a08A000000FxLPX	00DA0000000aAsxCO85618
CO-085618	a08A000000FxFNur	00DA0000000aAsxCO85619
CO-085619	a08A000000FxPH6	00DA0000000aAsxCO85620

This is the most important ID, and the one you'll use when doing batch updates.

For each and every record in your instance of Salesforce, an ID is created.

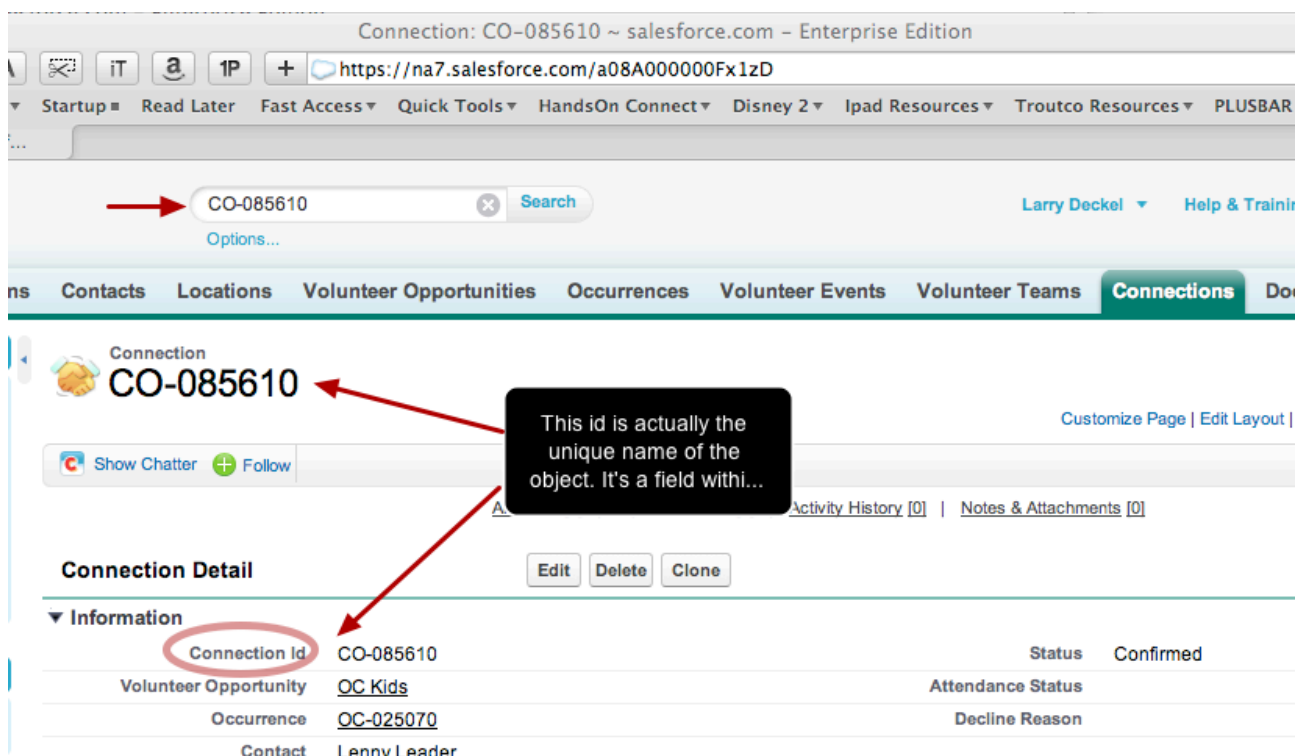
The ID is 15 characters with a combination of numbers and upper and lower case letters. It is case sensitive!

If you want to view a specific record in the system -- this ID is part of the URL that displays the record.



The first part of the URL is the web address of the salesforce server you are on, and the second half is the Salesforce ID for the record. (Since this is a connection record it's called the Connection ID)

Connection id (note this time id is in lower case)



Each record in Salesforce must have a Record Name Label.

It can be formatted as a text (i.e. Full Name, Tool Name, Account Name), or be an numeric code, that is auto-numbered by the system.

The format is always a letter or two (indicative of the record type, in this case CO for connection), a dash, and then a sequential number.

This ID number appears as a field in the record. You can use this ID when searching for records!

HOC ID



Occurrence with Connections and Volunteer Opportunities Report

Report Generation Status: Note: 2,000 of 52,632 records are displayed below. Select Export Details for a complete view of your data.

Report Options:

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

Time Frame

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

Run Report
 Hide Details
 Customize
 Save As
 Printable View
 Export Details

Connection: ID	Connection: Connection Id	HOC ID ↑	Import ID
a08A000000C3xdF	CO-394264	00DA000000a2D3CO394265	HCO2-955959-1284326
a08A000000C3xdG	CO-394265	00DA000000a2D3CO394266	HCO2-908819-1167694
a08A000000C3xdH	CO-394266	00DA000000a2D3CO394267	HCO2-976035-1282988
a08A000000C3xdI	CO-394267	00DA000000a2D3CO394268	HCO2-972080-1288133
a08A000000C3xdJ	CO-394268	00DA000000a2D3CO394269	HCO2-964139-1279441
a08A000000C3xdK	CO-394269	00DA000000a2D3CO394270	HCO2-964137-1279441
a08A000000C3xdL	CO-394270	00DA000000a2D3CO394271	HCO2-934807-990133
a08A000000C3xdM	CO-394271	00DA000000a2D3CO394272	HCO2-922386-1153517
a08A000000C3xdN	CO-394272	00DA000000a2D3CO394273	HCO2-948460-1144328
a08A000000C3xdO	CO-394273	00DA000000a2D3CO394274	HCO2-976949-1291891
a08A000000C3xdP	CO-394274	00DA000000a2D3CO394275	HCO2-973228-1291891
a08A000000C3xdQ	CO-394275	00DA000000a2D3CO394276	HCO2-899487-1117834
a08A000000C3xdR	CO-394276	00DA000000a2D3CO394277	HCO2-908864-975581
a08A000000C3xdS	CO-394277	00DA000000a2D3CO394278	HCO2-908864-1288766

The **HOC ID** is used to reference the record for some of the hard coding in the system, and is also used OUTSIDE Salesforce and HandsOn Connect (i.e. for feeds into external search engines such as All for Good and other external technologies)

It's 22 characters long and the first half refers to the instance of Salesforce that's involved, and the latter half refers to the record itself.

It is auto-numbered as each record is created. This is not an ID you'll use much internally within the system.

Import ID

When data is first imported into Salesforce from an external source (HandsOn Connect, 1800 Volunteer, other technologies...) the records are correlated from the source technology by

assigning an Import ID. This creates a map from the external source to the record within Salesforce.

This ID is important doing data import, but of no particular use thereafter. Nonetheless, the ID stays with the record.

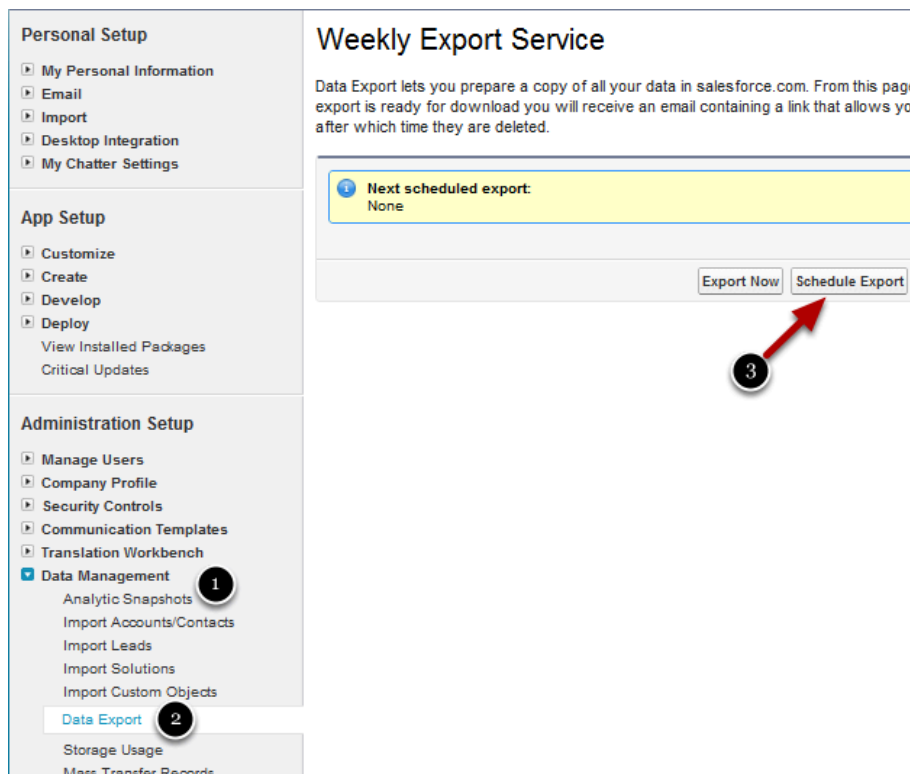
So for data management purposes - the ID we will usually want to use is the "Salesforce ID" (or in the case of a connection record, the **Connection ID. The one with 15 characters.**

Archiving your data - Weekly Export Service

Given that your data is your most important asset -- you should plan on keeping archival copies of all your data on your computer or a local server.

This way -- if you accidentally cause irreparable harm to your data - you'll have a backup of all your data which you can import back into the system!

Archiving is available through an automated Weekly Export Service (WES)



System Administrators can set-up and be notified of automated back-ups performed on the system.

To set-up the WES, click **Setup/ Administration Setup/ Data Management/ Data Export**

Then select "Schedule Export"

Setting the Export Specifications

Schedule Data Export

The screenshot shows the 'Schedule Data Export' configuration window. It includes a title bar with 'Schedule Data Export' and 'Save'/'Cancel' buttons. The main area contains several settings: 'Export File Encoding' set to 'ISO-8859-1', 'Include in export' checked (callout 1), 'Replace carriage returns with spaces' unchecked (callout 2), and 'Schedule Data Export' checked. The 'Frequency' section has 'Monthly' selected (callout 3) with options for 'On day 1 of every month' or 'On the 1st Sunday of every month'. The 'Start' date is '11/17/2010' and the 'End' date is '12/31/2015'. The 'Preferred Start Time' is '3:00 AM'. At the bottom, there are 'Save' and 'Cancel' buttons (callout 5). Below the main window, the 'Exported Data' section (callout 4) lists various data types to include: 'Include all data' (checked), 'RecordType', 'Approval', 'BusinessProcess', 'ContractContactRole', 'Contract', and 'User'.

- 1) Check the box for "Include in export" this includes documents and attachments in your system.
- 2) Uncheck the box for replacing carriage returns with spaces (optional)
- 3) Set the frequency that you wish the export to take place
- 4) Select the items you wish to have in the export. It is recommended that you select "Include all data."
- 5) Click "save"

Retrieving Export

Your Organization Data Export has completed - HandsOn Connect Demo

support@salesforce.com

Sent: Wed 11/17/2010 11:16 AM

To: Art Ordoqui

The export of your organization's data has been completed. Please click on the following link within the next 48 hours to receive the export.


<https://na7.salesforce.com/ui/setup/export/DataExportPage/d>

Thank you,
salesforce.com

After the export is completed, you'll be notified by e-mail. The e-mail will contain a link to the export, and the export will also be available at Setup/ Administration Setup/ Data Management/ Data Export for 48 hrs.

Weekly Export Service

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you export is ready for download you will receive an email containing a link that allows you to d after which time they are deleted.

 Next scheduled export: None	
<input type="button" value="Export Now"/> <input type="button" value="Schedule Export"/>	
Scheduled By	Art Ordoqui
Schedule Date	11/17/2010
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Action	File Name
download	WE_00DA0000000aAsxMAE_1.ZIP

We recommend backing up your data on a regular schedule once a week. However you can choose to backup more or less often!

How many snapshot 'backups' of your data you should keep is up to you. But you definitely want to have more than one -- just in case!

Avoiding Duplicate Records - Merging Contacts and Organizations

Merge Duplicate Organization Records

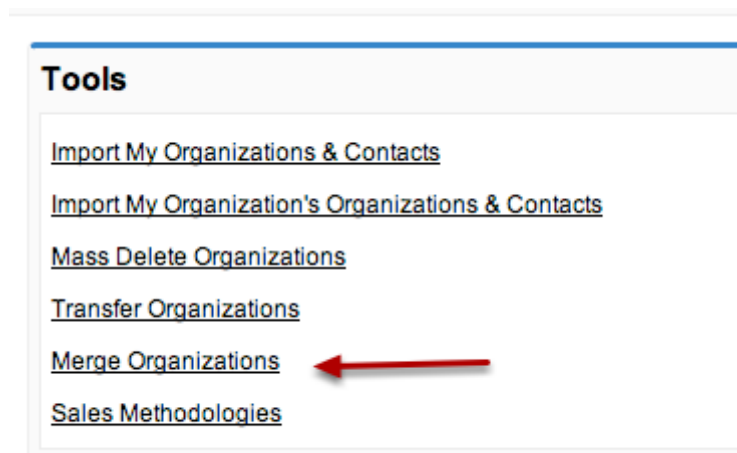
This lesson shows you how to merge duplicate Organizations while maintaining relationships to contacts, volunteer opportunities, and other related records.

To start, click on the Organization tab.

Note: If you want to make sure that all values and notes are preserved, print out the contact's record and list of related items to compare after the merge is complete.

IMPORTANT: If a contact has partner staff profile / portal access in one of the duplicate organizations, you should REMOVE their partner staff license/access BEFORE merging the organizations. You can keep portal users who are related to the MASTER record, but the partner staff access will not transfer from the deleted (merged) organizations to the new merged organization.

Organization Tab



Scroll to the Reports and Tools sections under the Recently viewed objects and click on Merge Organizations

Find Organizations

Step 1. Select the records to merge

Step 1 of 2

Next

Cancel

Please select up to three records that you wish to merge into one.

Art*

1

Find Organizations

You must select two or three records to merge.

	Customer Portal	Organization	Site	Owner
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Art in Texas, Inc.		Art Ordoqui
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ArtPace		Art Ordoqui
<input type="checkbox"/>	<input type="checkbox"/>	*Artists Repertory Theatre		HandsOn Connect Admin 9999
<input type="checkbox"/>	<input type="checkbox"/>	Art on Alberta		HandsOn Connect Admin 9999
<input type="checkbox"/>	<input type="checkbox"/>	*art4life		HandsOn Connect Admin 9999
<input type="checkbox"/>	<input type="checkbox"/>	Art in the Pearl		HandsOn Connect Admin 9999
<input type="checkbox"/>	<input type="checkbox"/>	Arthritis Foundaiton		HandsOn Connect Admin 9999
<input type="checkbox"/>	<input type="checkbox"/>	*Art Waves		HandsOn Connect Admin 9999
<input type="checkbox"/>	<input type="checkbox"/>	Art Title		Art Ordoqui
<input type="checkbox"/>	<input type="checkbox"/>	Arturo's Adventure Club		Art Ordoqui
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Art in Texas		Art Ordoqui

You must select two or three records to merge.

Next

Cancel

- 1) Enter the keyword to find the organizations to merge. You can use an * as a wildcard search.
- 2) mark the checkboxes next to the organizations you want to merge, and then click Next.
- 3) Take note if the organization has customer portal access as you want to leave this as the Master Record in the next Step.

You can select up to 3 organizations to merge at once. If you need to merge more than three, simply repeat these steps after you have completed the first merge.

Select the Values to Retain

Step 2. Select the values to retain

Previous Merge Cancel

Select the values that you want to retain in the merged record. Highlighted rows indicate fields that contain conflicting data. The Master Record selected will retain read-only and hidden field values. The oldest Created By date and user will be retained in the merged record.

Note: All related records including any notes, attachments, and activities will be associated with the new merged record.

1	Art in Texas, Inc. [Select All]	Art in Texas [Select All]
Master Record	<input checked="" type="radio"/>	<input type="radio"/>
Organization Name	<input checked="" type="radio"/> Art in Texas, Inc.	<input type="radio"/> Art in Texas
Also Known As	<input checked="" type="radio"/> AIT, Inc. Art Trout	<input type="radio"/>
Federal EIN	<input checked="" type="radio"/> 98-7654321	<input type="radio"/>
Organization Record Type	<input type="radio"/> Nonprofit	<input type="radio"/> Nonprofit
Type	<input type="radio"/> Government Organization	<input checked="" type="radio"/> Nonprofit
Status	<input checked="" type="radio"/> Active Partner	<input type="radio"/> Inactive
Primary Contact	<input checked="" type="radio"/> Art Partner	<input type="radio"/>
Primary Address?	<input checked="" type="radio"/> Shipping	<input type="radio"/> Shipping
Billing Address	<input checked="" type="radio"/> 226 E. Sunset Road San Antonio, TX 78209	<input type="radio"/> San Antonio, TX 78209
Address Visibility	<input type="radio"/> City and Zip only	<input type="radio"/> City and Zip only
Shipping Address	<input type="radio"/> 123 Main Street San Antonio, TX 78209 us	<input checked="" type="radio"/> 123 Main Street Suite 100 San Antonio, Tx 78209 United States
Phone	<input type="radio"/> (210) 338-0545	<input checked="" type="radio"/> (210) 123-4567
Fax		
Website	<input checked="" type="radio"/> http://www.artintexas.org	<input type="radio"/> http://www.artintexas.org
Sponsor Group		
Mission Statement	<input checked="" type="radio"/> Art in Texas believes in the value of public art throughout our communities. To this end, we work with local arts organization to develop RFPs for public art, to support art education in schools, and to work with local city and county governments to incorporate public art into zoning plans.	<input type="radio"/>
Auto Approve Opportunity	<input type="radio"/>	<input type="radio"/>
Opportunity Approval Manager	<input checked="" type="radio"/> Art Ordoqui	<input type="radio"/>

Select between the available values to determine which one to keep.

In this step you have the option to select the values from the different records that you wish to maintain in the merged record.

Fields highlighted in **Blue** indicate where a difference in the values is present.

1) If one of the records was marked as Customer Portal in the first step, make sure it is the one marked as "Master Record"

If more than one of the organizations is marked as customer portal, you need to go into the organization records that WON'T be the master - and remove portal access (partner staff licenses) from those contacts BEFORE merging. Their partner staff license will not automatically transfer to the newly merged organization. (Remove them first, and then after the merge, grant them partner staff access for the newly merged organization)

For fields that are multi-picklists, such as Population Served and Impact Area, it will not merge the values present in both records. If necessary, you can add the other values from the removed organization to the remaining record after it is merged.

2) Once you have marked all the values you wish to preserve, click Merge.

You will then get a warning message that lets you know that the merging of the records can't be undone, and if you want to proceed. Click OK.

Once the merge has been completed, you will be taken back to the Organization Tab, and the remaining organization will be listed at the top of the Recent Organization. Open the record to

confirm that all the changes were made. All the records related to the two previous organizations are now related to this record as well.

By Default - only system administrators have the ability to merge organization and contact records

Merging records requires permission to DELETE records. Therefore, only system administrators are able to merge records.

Make it your business practice to have your staff make requests for you to merge duplicates that they find.

OR... you can grant a few selected staff people profile permissions via a [permission set](#), that gives selected users delete permissions for Organizations and contacts.

Merge Duplicate Contact Records

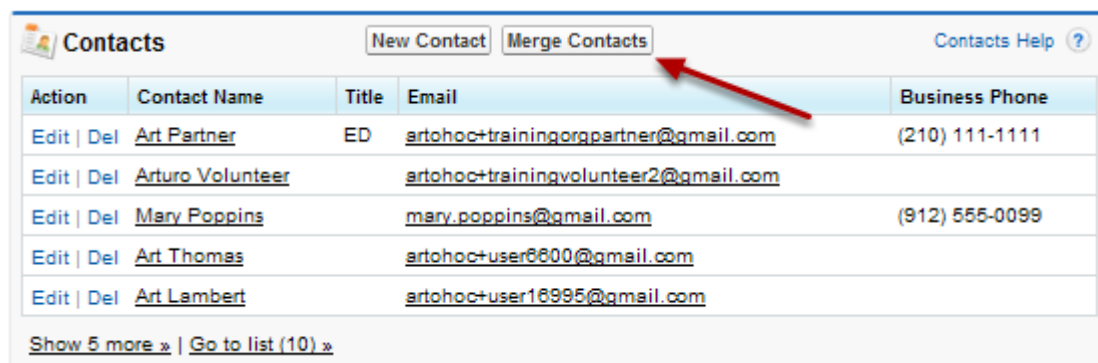
This lesson shows you how to merge duplicate Contacts while maintaining relationships to connections, team members, and other related records.

To start, the Contacts must be associated with the same organization. It is usually easier to have them related to an organization other than Individual as it makes it easier to find and merge. If you need to review how to edit contact records, [click here](#).

Once the contact records you want merged are associated with the same organization, open that organization's record.

Note: If you want to make sure that all values and notes are preserved, print out the contact's record and list of related items to compare after the merge is complete.

Organization Record



Contacts					Contacts Help ?
New Contact		Merge Contacts			
Action	Contact Name	Title	Email	Business Phone	
Edit Del	Art Partner	ED	artohoc+trainingorqpartner@gmail.com	(210) 111-1111	
Edit Del	Arturo Volunteer		artohoc+trainingvolunteer2@gmail.com		
Edit Del	Mary Poppins		mary.poppins@gmail.com	(912) 555-0099	
Edit Del	Art Thomas		artohoc+user6600@gmail.com		
Edit Del	Art Lambert		artohoc+user16995@gmail.com		
Show 5 more » Go to list (10) »					

Scroll to the Contacts related list under the organization's detail and click on [Merge Contacts](#)

Find Contacts

Step 1. Select the records to merge Step 1 of 2

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

Please select up to three records that you wish to merge into one. Use the "Find Contacts" feature to search for specific contacts associated with this organization, or click the All Contacts button to show all of the associated contacts for this organization.

Art* 1 [Find Contacts](#) [All Contacts](#)

	Customer Portal	Contact	Email	Business Phone	Owner
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Art Fix	artohoc+fixvolunteer@gmail.com		Client Administrator
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Art Lambert	artohoc+user16995@gmail.com		HandsOn Connect Admin 9999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Art Ordoqui	artohoc+trainingorg@gmail.com	2103380545	HandsOn Connect Demo (Training) Demo & Training
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Art Partner	artohoc+trainingorgpartner@gmail.com	(210) 111-1111	Art Ordoqui
<input type="checkbox"/>	<input type="checkbox"/>	Art Thomas	artohoc+user6800@gmail.com		HandsOn Connect Admin 9999
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Arthur Fix			Staff Training Profile
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Arturo Volunteer	artohoc+trainingvolunteer2@gmail.com		Art Ordoqui

- 1) Enter the keyword to find the contact to merge. You can use an * as a wildcard search.
- 2) Mark the checkboxes next to the contacts you want to merge, and then click [Next](#).
- 3) Take note if the contact has customer portal access as you want to leave this as the Master Record in the next Step

You can select up to 3 contacts to merge at once. If you need to merge more than three, simply repeat these steps after you have completed the first merge.

Select the Values to Retain

Step 2. Select the values to retain 3 [Previous](#) [Merge](#)

Select the values that you want to retain in the merged record. Highlighted rows indicate fields that contain conflicting data. The Master Record selected will retain read-only and hidden field values. The oldest Created By date and user will be retained in the merged record.

Note: Activities, Notes, Attachments, Cases, Opportunities, and Campaign History related to these Contacts will be associated with the resulting merged record.

	Art Fix [Select All]	Arthur Fix [Select All]
1 Master Record	<input checked="" type="radio"/>	<input type="radio"/>
2 Portal User	<input checked="" type="radio"/> artohoc+fixvolunteer@gmail.com[Customer Portal]	<input type="radio"/> [Not a portal user]
Contact Owner	<input checked="" type="radio"/> Client Administrator	<input type="radio"/> Staff Training Profile
Name	<input checked="" type="radio"/> Art Fix	<input type="radio"/> Arthur Fix
Middle Name		
Username	<input checked="" type="radio"/> artohoc+fixvolunteer@gmail.com	<input type="radio"/>
Registration Status	<input checked="" type="radio"/> Registered	<input type="radio"/> Not Registered
Employer		
Organization Name	Art in Texas, Inc.	Art in Texas, Inc.
Title		
Primary Address?	Home	Home
Home Address	<input checked="" type="radio"/> 123 Main Street San Antonio, AL 78209	<input type="radio"/> 123 main Street San Antonio, TX 78209
Business Address		
Primary Phone?	Home	Home
Business Phone		
Home Phone	(210) 123-4567	(210) 123-4567
Mobile Phone		
Other Phone		
Fax		
Email	<input checked="" type="radio"/> artohoc+fixvolunteer@gmail.com	<input type="radio"/>
Alternate Email		
Gender		
Ethnicity/Race	<input type="radio"/>	<input type="radio"/>
Marital Status	<input type="radio"/>	<input type="radio"/>
Education Level		

Select between the available values to determine which one to keep.

In this step you have the option to select the values from the different records that you wish to maintain in the merged record.

Fields highlighted in **Blue** indicate where a difference in the values is present.

- 1) If one of the records was marked as Customer Portal in the first step, make sure it is the one marked as "Master Record"
- 2) If the contacts both have Portal User access, select the username that the contact wants to use moving forward.

For fields that are multi-picklists, such as Volunteer Type and Interest, it will not merge the values present in both records. If necessary, you can add the other values from the removed organization to the remaining record after it is merged.

- 3) Once you have marked all the values you wish to preserve, click Merge.

You will then get a warning message that lets you know that the merging of the records can't be undone, and if you want to proceed. Click OK.

Once the merge has been completed, you will be taken back to the Organization record, and the remaining contact will be included in the Contacts related list. Open the contact record to confirm that all the changes were made. All the records related to the two previous contacts are now related to this record as well.

By Default - only system administrators have the ability to merge organization and contact records

Merging records requires permission to DELETE records. Therefore, only system administrators are able to merge records.

Make it your business practice to have your staff make requests for you to merge duplicates that they find.

OR... you can grant a few selected staff people profile permissions via a [permission set](#), that gives selected users delete permissions for Organizations and contacts.

The hazards of deleting data

Deleting Records

In this post we will show you how to delete records - but caution you that unless done with great care and understanding of the database -- you should NOT delete data.

NOTE: Deleting records, especially mass deletion of records, is not recommended.

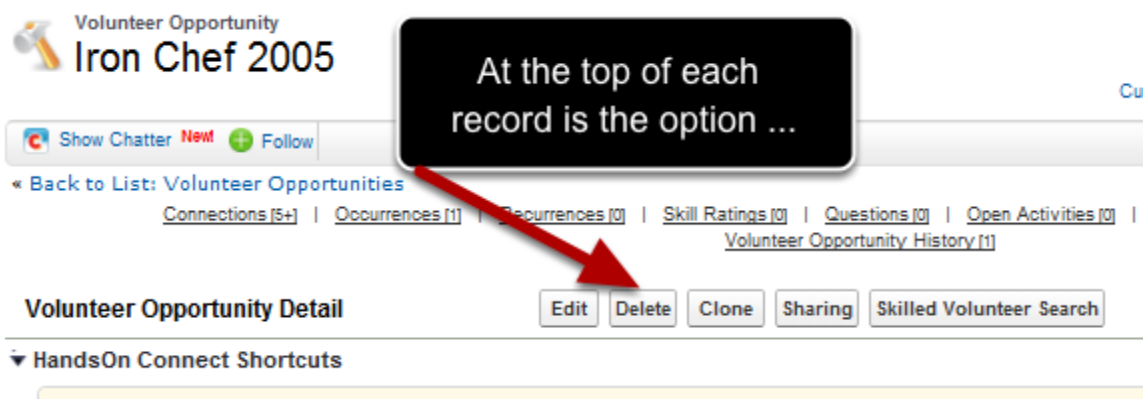
See the next post to understand [what can happen if records are deleted!](#)

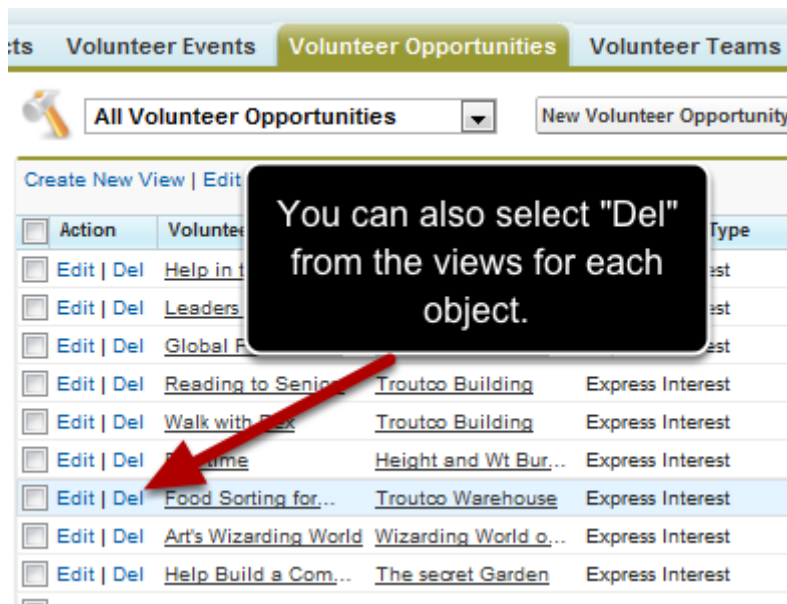
Salesforce does not archive data for you. If you delete it, it will eventually be permanently gone. And if there are related records that required the record you deleted - you will corrupt the other records :-(

The only way to archive data (in case you DO delete and regret it) is to export the data.

To learn how to set-up the auto-export, [click here](#).

Delete Individual Records





These should only be used when you mistakenly created a volunteer opportunity, occurrence, contact, organization, etc..

DO NOT delete any record that has related objects associated with it.

For example if you delete an occurrence, then all the connections to that occurrence will be missing required information and be corrupted.

If you delete a volunteer opportunity, it will corrupt any related occurrences and/or connections. This data corruption may break system functionality on both the public and admin site.

Instead of deleting records -- mark them as inactive or cancelled. This will effectively pull them out of reports and keep them off the public site, while preserving their relationship to other related objects.

If you have created a duplicate contact or organization, utilize the merge option to correct the duplication.

[Click here to see how to merge organizations.](#)

[Click here to see how to merge contacts.](#)

If a record has been mistakenly deleted - it will be recoverable from the recycling bin for 15 days or until space isn't available

Salesforce does have a recycling bin for deleted records, unless you opted to Permanently Delete the records during the mass delete. .

See [this post](#) to see how to manage the Recycling Bin.

"My public site no longer works": What can happen if you delete records that are required fields in other records.

Volunteer Opportunities, Occurrences, locations and connections have lookup fields to other objects. And some of these lookup fields are required fields in another object.

So deleting a location may corrupt the record for a volunteer opportunity.

What happens if, for example, you delete a non-profit organization that is the managing organization for an active volunteer opportunity?

Answer: Bad things happen!

A volunteer opportunity has a number of required fields - including a default location where the opportunity takes place

Volunteer Opportunity
Help find Missing People

Customize Page | Edit Layout | Printable View | Help for this Page

Show Chatter | Following | Add Tag

Connections (0) | Occurrences (0) | Recurrences (1) | Skill Ratings (0) | Questions (0) | Open Activities (0) | Activity History (0) | Notes & Attachments (0) | Volunteer Opportunity History (1)

Volunteer Opportunity Detail | Edit | Delete | Clone | Sharing | Skilled Volunteer Search

HandsOn Connect Shortcuts

Volunteer Opportunity Overview
Here's your at-a-glance view of this Volunteer Opportunity:

- ✓ Opportunity Created
- ✓ Occurrence Created [Create New Occurrence](#)
- ✓ Recurrence Created [Create New Recurrence](#)
- ✓ Opportunity Description [Add/Change Description](#)
- ✓ Opportunity Characteristics (Optional - Improves Search and Metrics)
- ✓ Opportunity Published (Status: Active)
- Verifications Complete

Total Active Occurrences: 1
Total Verifications Due: 0

Ready to create a new Volunteer Opportunity? If so, [click here](#) to get started.

Custom Links | [Change Description](#)

Information

Owner: [Larry Deckel](#) | Status: Active

Volunteer Opportunity Name: Help find Missing People | Posting Status: We have approved your record and it was posted on 7/25/2011.

Opportunity Type

Type: Project | Activity Type: Training Type

Schedule Type: Date & Time Specific

Special Event Information

Time/Date Information

Organization Information

Managed By: Partner | Organization Served: Missing in Action

Managing Organization: Missing in Action | Organization Served URL: [http://demo.handsconnect.org/HOC_Organization...](#)

Opportunity Approval Manager: Larry Deckel

Location Information

Default Location: [Missing Persons HQ](#) | Street: 123 Main St

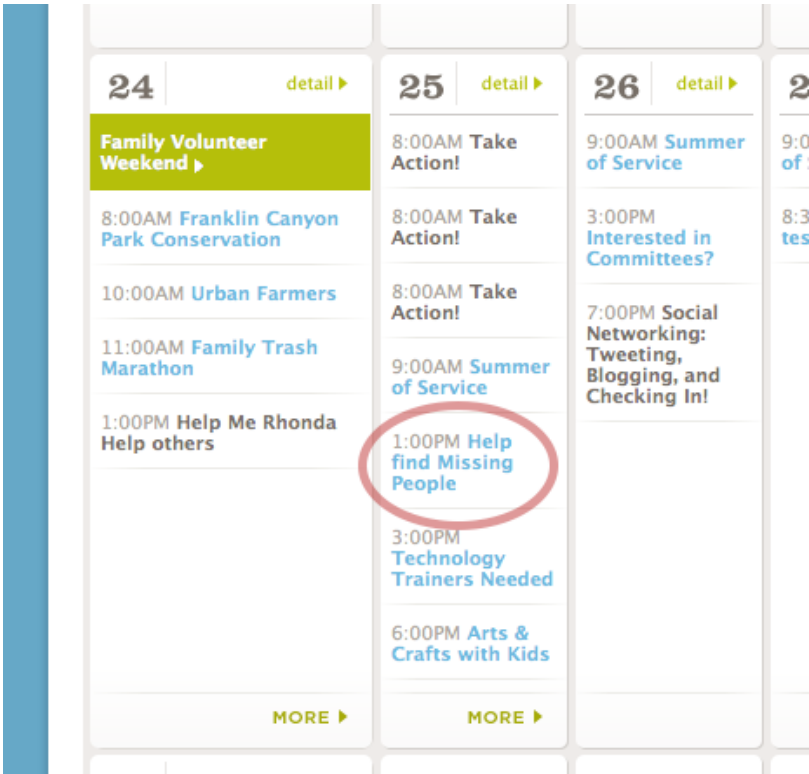
Google Map URL: [http://maps.google.com/?q=123%20Main%20St%20Riverside%20CA%20](#) | City: Riverside

State/Province: CA | Zip/Postal Code: 92506

Country:

This opportunity "Help find Missing People" has "Missing Persons HQ" as its default location. This location is also used in each of its occurrences.

The opportunity shows up on the calendar on the public site on the last Monday of every month



A recurrence for this opportunity has the volunteer opportunity taking place on the last Monday of every month.

Watch what happens however, if someone deletes the location "Missing Persons HQ" from the database.

Location
Missing Persons HQ

Customize Page | Edit Layout | Printable View | Help for this Page

Volunteer Opportunities [1] | Occurrences [6] | Recurrences [1] | Open Activities [0] | Activity History [0] | Notes & Attachments [0]

Location Detail

Edit Delete Clone Sharing

Information

Owner: Larry Decker [Change] Organization: Missing in Action

Location Name: Missing Persons HQ

Street: 123 Main St

City: Riverside

State/Province: CA

Zip/Postal Code: 92506

Country:

Special Directions:

Google Map URL: <http://maps.google.com/?q=123%20Main%20St%20Riv...>

System Information

Created By: Larry Decker, 7/25/2011 11:03 AM Last Modified By: Larry Decker, 7/25/2011 11:55 AM

Edit Delete Clone Sharing

Volunteer Opportunities

New Volunteer Opportunity

Volunteer Opportunities Help

Action	Volunteer Opportunity Name	Start Date	End Date	Status
Edit Del	Help find Missing People	7/25/2011	12/31/2011	Active

Occurrences

New Occurrence

Occurrences Help

Action	Occurrence ID	Start Date & Time	End Date & Time	Status
Edit Del	OC-025222	7/25/2011 1:00 PM	7/25/2011 3:00 PM	Active

A 'helpful' staff person decided for some reason to delete this location as they heard it was closed down.

They did not however, go back to the occurrences that were using this location and put in another location. So now we have Occurrences that have no location! Hence, no zip code field is available to search.

Occurrence OC-025222

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

Show Chatter Following

Add To Favorites

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

Occurrence Detail

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

HandsOn Connect Shortcuts

Occurrence Overview

Here's your at-a-glance view of this Occurrence.

✓ Occurrence Published (Status: Active)

☐ Verifications Complete

Total Verifications Due: 0

Ready to create a new Occurrence? If so, [click here](#) to get started.

Information

Owner	Larry Deckel [Change]	Status	Active
Occurrence ID	OC-025222	Posting Status	We have approved your record and it was posted on 7/25/2011.
Volunteer Opportunity	Help find Missing People	Recurrence	
Location		Volunteer Leader Needed	<input type="checkbox"/>
Occurrence URL	http://demo.handsonconnect.org/HOC_Volunteer O...		

This required field is now m...

When someone clicks on "Find an Opportunity" the default search looks for this occurrence, but can't render it because it is missing the zip code field required to display the search results!

Instead of the Search Results grid -- the volunteer sees this!!! Oh oh -- your public site is now broken.



Authorization Required

You must first log in or register before accessing this page.

Username

Password

[Login](#) [Not a member? Register](#)

POWERED BY



+



When you see this "Authorization Required" screen on your public site -- it generally means required information in your data may be missing.

Often you may not know which record is missing, or which required field isn't populated.

You can run a report on required fields for Occurrences to troubleshoot, and repopulate the missing fields, and the site will return to normal.

In some cases, you may find the culprit record in the [recycle bin](#). You can often recover it from there. (It may or may not restore the lookups in the parent records. So you may have to restore those manually).

MORAL: Don't delete records!

Best practice: Remove permission to delete records from all profiles except your system administrator profile.

See this post on [how to update profiles](#) for staff, partner staff, and volunteer leaders.

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

While the recommended business practice is to mark records as inactive rather than delete them there may be a time when you need to delete records from your system .

If you do need to delete a record, the recommended business practice is to first delete any of the related objects first and then delete the record. For example, if you need to **delete a Contact**, first delete their Connections and Volunteer Team Members before you delete the Contact. If you do not delete the related objects then you will end up with a Volunteer Team Member that is not associated with a Contact, and this will cause errors in your data. But if you do this - you'll lose the hours and history of that contact as their connections will now be gone.

DO NOT DELETE ORGANIZATIONS without first removing all the related objects. If you delete an organization and haven't cleared the Volunteer Opportunities it will break the Find an Opportunity functionality of the system.

The biggest data mistake we find in instances of HandsOn Connect are when people delete Volunteer Opportunities. They delete the Volunteer Opportunity and wind up with a corrupted occurrence, because Occurrences REQUIRE a Volunteer Opportunity. Now its impossible for updates to take place on these occurrences and automations like changing email addresses for Opportunity Coordinators, or changing your Opportunity Approval Manager will return errors, because these corrupted occurrences can't be updated and saved!


How to "Safely" delete a Volunteer Opportunity

If you have a 'bad' Volunteer Opportunity that you just want to get out of the system - don't just delete it. First look at its related lists, and see if it has any occurrences or connections. You must delete them first!

FIRST delete the connections to the volunteer opportunity (and remember, if you do this, you'll lose all that volunteer history).

THEN, check each occurrence for the opportunity, and make sure it has no related items, and delete the occurrence.

THEN, when there are no related fields associated with the Volunteer Opportunity you can safely delete it!

 **Larry Deckel** changed End Date from 10/10/2014 to 10/17/2014.
Comment · Like · Today at 12:44 PM

« Back to List: Volunteer Opportunities

Skill Ratings [0] | Required Prerequisite [0] | Used as Prerequisite for [0] | Occurrences [1] | Recurrences [0] | Grouped Occurrences [0] | Connections [0] | Volunteer Opportunity Questions [0] | Open Activities [0] | Activity History [0] | Notes & Attachments [0] | Volunteer Opportunity History [1]

Volunteer Opportunity

Don't delete this record! It still has one occurrence associated with it.

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Add Question](#) [Add Prerequisite](#) [Skilled Volunteer Search](#)

HandsOn Connect Shortcuts

Volunteer Opportunity

You must delete the occurrence FIRST, so you do not wind up with a corrupted occurrence that is missing this 'required' Volunteer Opportunity in its record!

Here's your at-a-glance view of this Volunteer Opportunity:

- ☒ Opportunity Description [Add/Change Description](#)
- ☒ Opportunity Characteristics (Optional – Improves Search and Metrics)
- ☐ Opportunity Published (Status: Pending) [Publish](#)
- ☐ Verifications Complete

Total Active Occurrences: 0

Total Verifications Due: 0

Ready to create a new Volunteer Opportunity? If so, [click here](#) to get started.

Deleting an Individual Record

At the top of each record is a Delete button. (Delete buttons are generally only available to system administrators. Its best this way - as you don't want others deleting data unsafely just because the button is present!)

Contact Detail

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Request Update](#)

▼ **HandsOn Connect Shortcuts**

Contact Overview

You can also delete records through the related lists.

[Connections \[3+\]](#) | [Volunteer Team Members \[1\]](#) | [Skill Ratings \[0\]](#) | [Reg](#)

Connections [New Connection](#)

Action	Connection Id	Role	Volunteer Opportunity	Occurrence
Edit Del	CO-005990	Volunteer	Break the Cycle of Homeless!	OC-009462
Edit Del	CO-048384	Volunteer	Creative Writing	OC-009856
Edit Del	CO-001328	Volunteer	Assistant at Food Pantry	OC-009817
Edit Del	CO-008614	Volunteer	Be A Tutor At Sellwood Middle School	OC-010493
Edit Del	CO-056355	Volunteer	Crisis Line Worker	OC-009401

Show 4 more | Go to list (0)

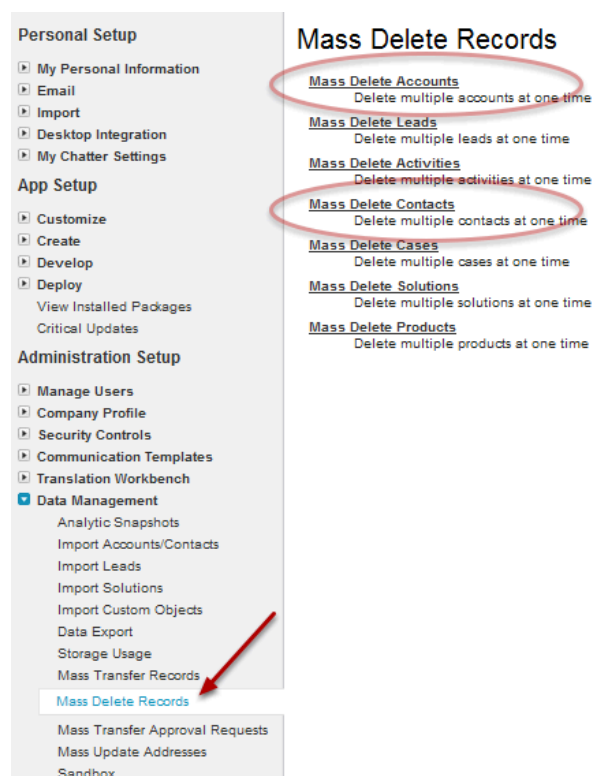
Mass Deleting of Records

Salesforce only allows Organizations (Accounts) and Contacts to be deleted from HandsOn Connect. **Remember though that you still need to delete the related objects before deleting the Organizations or Contacts.**

Before performing a mass delete, it is highly recommended that you archive the data before you preceding with the mass delete. [See this post for how to archive your data.](#)

To mass delete Organization or Contacts go to Setup/ Admin Setup/ Data Management/ Mass Delete Records.

Select either Mass Delete Accounts (for Organizations) or Mass Delete Contacts



You will then be taken to a screen to enter the parameters for selecting the records to delete.

You can filter the contacts based on any value in the contact record. Once you've entered the search criteria, click on Search to view the results.

There is a maximum of 250 records that can be deleted at once, so if your search results with more than 250 records, you will need to repeat these steps.

▼ Step 3: Find Contacts that match the following criteria:

Account Name	▼	equals	▼	IBM	AND
Profile Name	▼	equals	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
Name	▼	--None--	▼		
Salutation	▼	--None--	▼		
First Name	▼	--None--	▼		
Last Name	▼	--None--	▼		
Account Name	▼	--None--	▼		
Account ID	▼	--None--	▼		
Account Parent Account	▼	--None--	▼		
Reports To	▼	--None--	▼		
Contact Record Type	▼	--None--	▼		
Mailing Street	▼	--None--	▼		
Mailing City	▼	--None--	▼		

multiple items in the third column, separated by commas.
following format: 4/19/2011
following format: 4/19/2011 3:47 PM

Search

be deleted.
nine users will not be deleted

In the search results, mark the checkbox to the left of the contact records you wish to delete and then click on Delete.

NOTE: There is no confirmation message, so once you click Delete there's no turning back.

Recycling Bin

Salesforce does have a recycling bin for deleted records, unless you opted to Permanently Delete the records during the mass delete.

However, the Recycling Bin doesn't restore the relationships to the other records.

See [this post](#) to see how to manage the Recycling Bin.

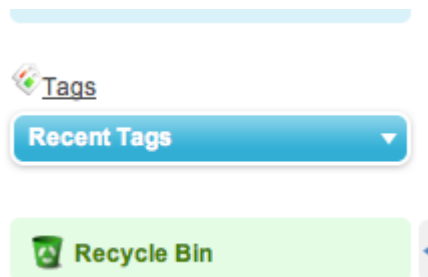
Before deleting records - make sure you are scheduling regular backups of your data.

Mistakes happen. Make sure you don't perform any deletions or mass deletions unless you are backing up your data each week. [See this post for instructions on how to back up your data.](#) (No one else has a backup of your data, so this is your responsibility!)

How to Manage the Recycle Bin

Please note that the Recycling Bin can only store **up to 5,000** items at a time. Once it has reached capacity the oldest data will be permanently deleted as new items are added to the recycling bin.


The Recycle Bin is at the bottom of the left sidebar on every page




Click on the link to get to the recycle bin home page

How to Empty the Recycle Bin

Recycle Bin

View: My recycle bin 

Action	Name	Type	Deleted By	Deletion Date
<input checked="" type="checkbox"/>	Ad-000003	Sponsor Ad	Deckel, Larry	7/14/2011 8:13 PM
<input type="checkbox"/>	Ad-000004	Sponsor Ad	Deckel, Larry	7/14/2011 8:12 PM
<input type="checkbox"/>	Lando D'free	Contact	Deckel, Larry	7/12/2011 3:30 PM
<input type="checkbox"/>	Delta	Organization	Deckel, Larry	7/12/2011 3:26 PM
<input type="checkbox"/>	Homework 6 - item 4	Report	Deckel, Larry	7/10/2011 3:25 PM
<input type="checkbox"/>	CO-000039	Connection	Deckel, Larry	7/5/2011 4:49 PM
<input type="checkbox"/>	CO-084474	Connection	Deckel, Larry	7/5/2011 4:49 PM
<input type="checkbox"/>	RQ-000005	Registration Question	Deckel, Larry	7/1/2011 7:12 PM
<input type="checkbox"/>	CO-084423	Connection	Deckel, Larry	6/30/2011 5:29 PM



Everyone has access to their personal recycle bin.

System Administrators have access to everyone's recycle bin ("Your organization's recycle bin")

You can use the Search bar at the top of the page to search for specific items.

To restore a record BACK into Salesforce. Put a check mark next to the item name and click the UNDELETE Button.

Some objects will restore their lookup-related parent objects, but some will not. So you may have to manually restore previous relationships.

(This can be tricky to do -- another reason why we recommend that you **do not delete records!**)

Clicking on "Empty your recycle bin" or "Empty your organization's recycle bin" will permanently remove the data from salesforce. There is no undo for this! (Other than to reimport information back into salesforce from your exported archival data).

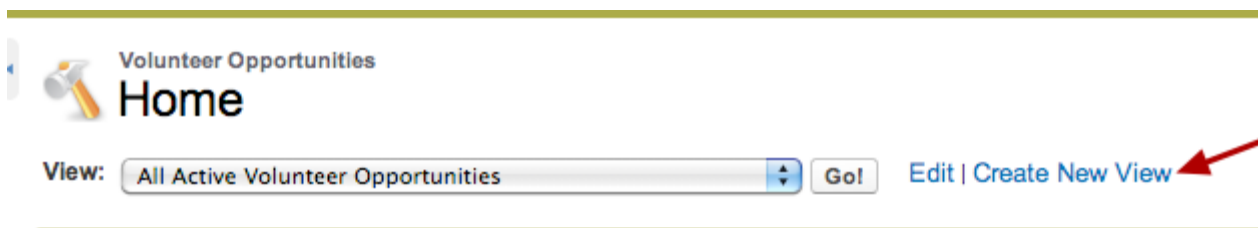
Simple Data Updates using Views

Using Views to update records

The custom objects in HandsOn Connect allow for the flexibility to update most fields in the records. The custom objects include Locations, Volunteer Opportunities, Volunteer Teams, Occurrences, Connections, etc.

While this isn't helpful for updating the date and time fields, this is an easy way to update fields such as Status, Opportunity Coordinator, and Default Locations.

Creating a New View



Every object has the ability to create custom views which can serve as mini- reports, except that you can't export them.

A screenshot of the 'Create New View' form for 'Volunteer Opportunities'. The form has a title bar with a hammer icon and the text 'Volunteer Opportunities Create New View'. Below the title bar are 'Save' and 'Cancel' buttons. The main content area is titled 'Step 1. Enter View Name'. It contains two input fields: 'View Name' with the text 'Update default locations' and 'View Unique Name' with the text 'Update_default_locatix'. There is an information icon (i) next to the 'View Unique Name' field.

When creating a custom view keep these tips in mind:

Filter by Owner: Unless your organization really manages the record owner to assign items to specific staff, you will want to always select the "All [object name]" option

Additional filters:

Filters are limit to the object you are in, you can not filter by fields in the related objects (for example: for Volunteer Opportunities you can't set a filter based on the occurrence record)

If you are using a date related filter you can use both numerical dates (6/15/2011) or reference values such as TODAY. [Click here](#) for a complete list of options for reference values.

Fields to Display:

Make sure that you include the fields you want to edit in the display

Restrict visibility:

Since Staff and System Admins can create views, you want to make them accessible to all Internal Users

In the screen shot below we are updating the Default Location for all the Volunteer Opportunities associated with the organization Art in Texas.

Remember to use Organization Served to capture both Partner and Affiliate Managed opportunities.

Step 2. Specify Filter Criteria

Filter By Owner:

- ☒ All Volunteer Opportunities
- ☐ My Volunteer Opportunities

Filter By Additional Fields (Optional):

Field	Operator	Value	AND
Organization Served Name	equals	Art in Texas	AND
End Date	greater or equal	TODAY	AND
None	None	None	AND
None	None	None	AND

Step 3. Select Fields to Display

Available Fields:

- Court Ordered Allowed
- Description
- End Date Time
- Gender Served
- Google Map URL
- Guest Volunteer Hours Served
- Guest Volunteers Attended
- HOC Domain Name
- HOC ID
- HON Signature Initiatives
- Hosting Organization
- Hosting Syndication Logo URL
- Impact Area (Local)
- Import ID
- Invitation Code

Selected Fields:

- Volunteer Opportunity Name
- Default Location
- Opportunity Coordinator
- Start Date
- End Date

Step 4. Restrict Visibility

☐ Visible only to me

☐ Visible to all users (Includes partner and customer portal users)

☒ Visible to certain groups of users

Search: Public Groups for: Find

Your search returned more than 100 results. Only the first 100 are displayed. Please refine search criteria.


Available for Sharing:


- All Customer Portal Users
- Group: AmeriCorps
- Group: Art in Texas, Inc.
- Group: Brenden's Org
- Group: Esteem Builders
- Group: Friends of Screven County Animals
- Group: HandsOn Connect Demo
- Group: Happy Campers
- Group: Jumping for Joy
- Group: Justice League of America
- Group: Maco
- Group: My Favorite Partners
- Group: Org Review Team
- Group: Program Staff

Shared To:















- All Internal Users

Edit All Records

 Update default locations [Edit](#) | [Delete](#) | [Create New View](#)

[Change Owner](#) 

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V

<input type="checkbox"/>	Action	Volunteer Opportunity Name ↑	Default Location	Opportunity Coordinator	Start Date	End Date
<input type="checkbox"/>	Edit Del 	Art Mentors	Art School	Art Ordoqui	11/1/2010	7/1/2012
<input type="checkbox"/>	Edit Del 	Back to School- Open House	School House Rock Elementary	Art Partner	8/18/2011	8/18/2011
<input type="checkbox"/>	Edit Del 	Fall into Books- Book Drive	School House Rock Elementary	Tim Taylor	9/12/2011	9/16/2011
<input type="checkbox"/>	Edit Del 	Field Day Volunteers	Camp Fun	Art Partner	6/1/2011	8/31/2011
<input type="checkbox"/>	Edit Del 	MLK Day- Project 1	School House Rock Elementary		1/16/2012	1/16/2012
<input type="checkbox"/>	Edit Del 	MLK Day- Project 2	School House Rock Elementary		1/16/2012	1/16/2012
<input type="checkbox"/>	Edit Del 	MLK Day- Project 3	School House Rock Elementary		1/16/2012	1/16/2012
<input type="checkbox"/>	Edit Del 	ReachOUT and Clean up	Warehouse	Art Lewis	2/21/2011	2/21/2012
<input type="checkbox"/>	Edit Del 	Readers Needed!	School House Rock Elementary	Art Lewis	3/1/2011	12/31/2011
<input type="checkbox"/>	Edit Del 	School Book-pack Drive	School House Rock Elementary	Art Lewis	8/20/2011	8/20/2011
<input type="checkbox"/>	Edit Del 	Spring Cleaning at the Shelter	Training Grounds		3/12/2011	3/12/2012
<input type="checkbox"/>	Edit Del 	Summer Camp Counselors	Training Grounds		5/30/2011	8/12/2011
<input type="checkbox"/>	Edit Del 	Summer of Service	Art School	Art Parks	5/30/2011	4/15/2012
<input type="checkbox"/>	Edit Del 	Water the Gardens	Art School		4/1/2011	9/30/2011

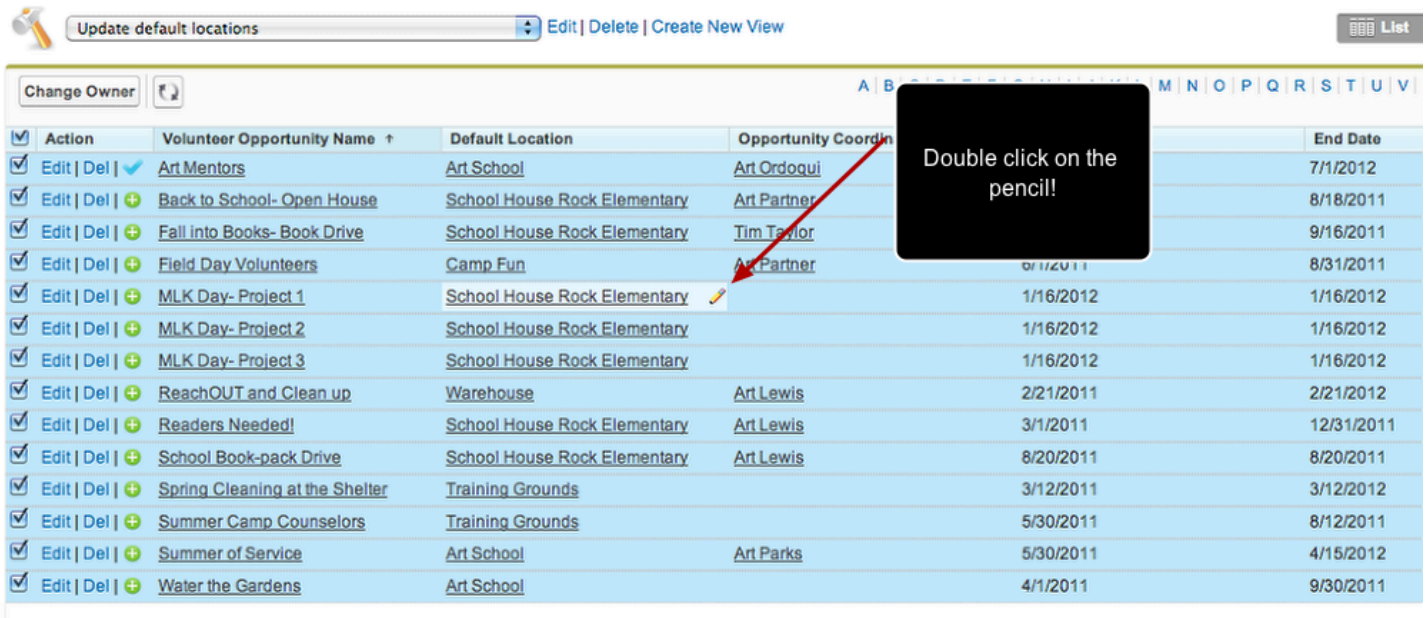
Once you have your view created, then you can edit the desired information.

In this case we wish to change the default location for ALL these opportunities that are served by the organization "Art in Texas"

(I guess they lost all their other locations. Too Bad.)

We are going to change ALL of these opportunities to take place in the location: "Art School"

Select all records you wish to edit by using the checkbox on the left, then double click on the field you want to edit in one of the records

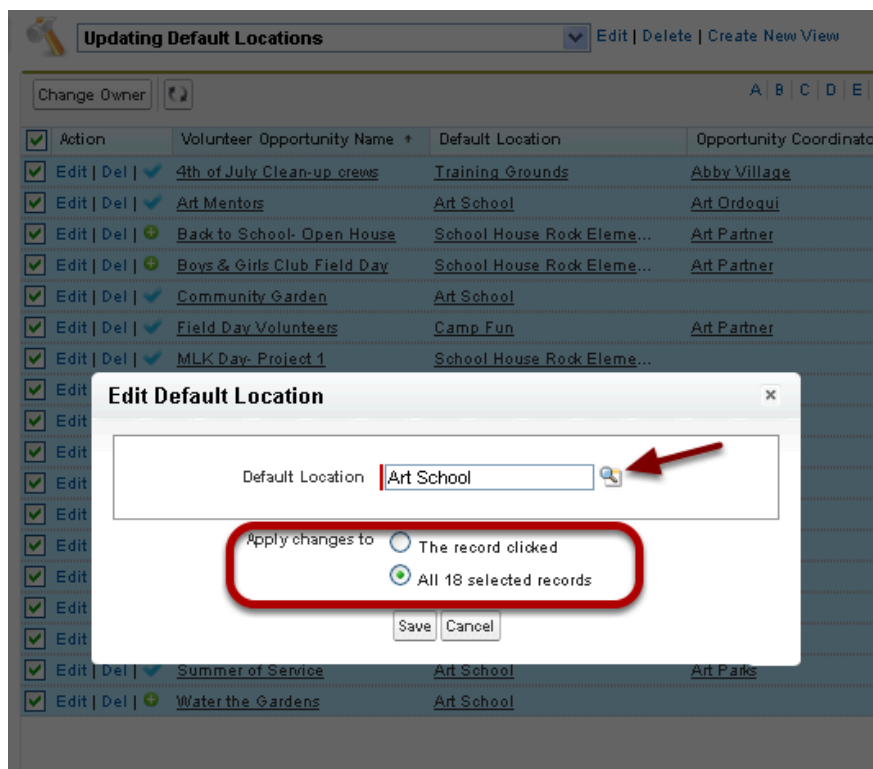


Update default locations Edit | Delete | Create New View List

Change Owner

Action	Volunteer Opportunity Name	Default Location	Opportunity Coordinator	End Date
<input checked="" type="checkbox"/> Edit Del	Art Mentors	Art School	Art Ordoqui	7/1/2012
<input checked="" type="checkbox"/> Edit Del	Back to School- Open House	School House Rock Elementary	Art Partner	8/18/2011
<input checked="" type="checkbox"/> Edit Del	Fall into Books- Book Drive	School House Rock Elementary	Tim Taylor	9/16/2011
<input checked="" type="checkbox"/> Edit Del	Field Day Volunteers	Camp Fun	Art Partner	8/31/2011
<input checked="" type="checkbox"/> Edit Del	MLK Day- Project 1	School House Rock Elementary		1/16/2012
<input checked="" type="checkbox"/> Edit Del	MLK Day- Project 2	School House Rock Elementary		1/16/2012
<input checked="" type="checkbox"/> Edit Del	MLK Day- Project 3	School House Rock Elementary		1/16/2012
<input checked="" type="checkbox"/> Edit Del	ReachOUT and Clean up	Warehouse	Art Lewis	2/21/2011
<input checked="" type="checkbox"/> Edit Del	Readers Needed!	School House Rock Elementary	Art Lewis	12/31/2011
<input checked="" type="checkbox"/> Edit Del	School Book-pack Drive	School House Rock Elementary	Art Lewis	8/20/2011
<input checked="" type="checkbox"/> Edit Del	Spring Cleaning at the Shelter	Training Grounds		3/12/2011
<input checked="" type="checkbox"/> Edit Del	Summer Camp Counselors	Training Grounds		5/30/2011
<input checked="" type="checkbox"/> Edit Del	Summer of Service	Art School	Art Parks	5/30/2011
<input checked="" type="checkbox"/> Edit Del	Water the Gardens	Art School		4/1/2011

You'll be given the option to edit one record, or all the records you've selected.



Updating Default Locations Edit | Delete | Create New View

Change Owner

Action	Volunteer Opportunity Name	Default Location	Opportunity Coordinator
<input checked="" type="checkbox"/> Edit Del	4th of July Clean-up crews	Training Grounds	Abby Village
<input checked="" type="checkbox"/> Edit Del	Art Mentors	Art School	Art Ordoqui
<input checked="" type="checkbox"/> Edit Del	Back to School- Open House	School House Rock Eleme...	Art Partner
<input checked="" type="checkbox"/> Edit Del	Boys & Girls Club Field Day	School House Rock Eleme...	Art Partner
<input checked="" type="checkbox"/> Edit Del	Community Garden	Art School	
<input checked="" type="checkbox"/> Edit Del	Field Day Volunteers	Camp Fun	Art Partner
<input checked="" type="checkbox"/> Edit Del	MLK Day- Project 1	School House Rock Eleme...	
<input checked="" type="checkbox"/> Edit Del	Summer of Service	Art School	Art Parks
<input checked="" type="checkbox"/> Edit Del	Water the Gardens	Art School	

Edit Default Location

Default Location Art School

Apply changes to

☐ The record clicked

☒ All 18 selected records

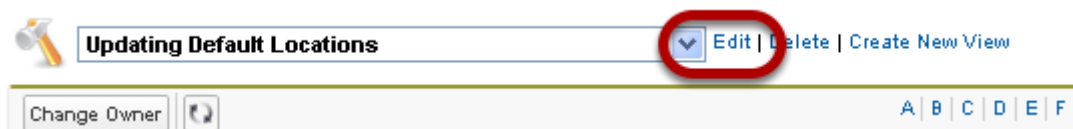
Save Cancel

Enter the value you wish to put in the field, and then select whether to apply to just the one record, or ALL the records checked.

Click SAVE.

NOTE: If the edit you are making has lookups to other fields, such as updating Opportunity Coordinator which updates the Opportunity Coordinator Email, the change will not be made when the view reloads. Simply wait a moment and refresh the view to see the other updated values.

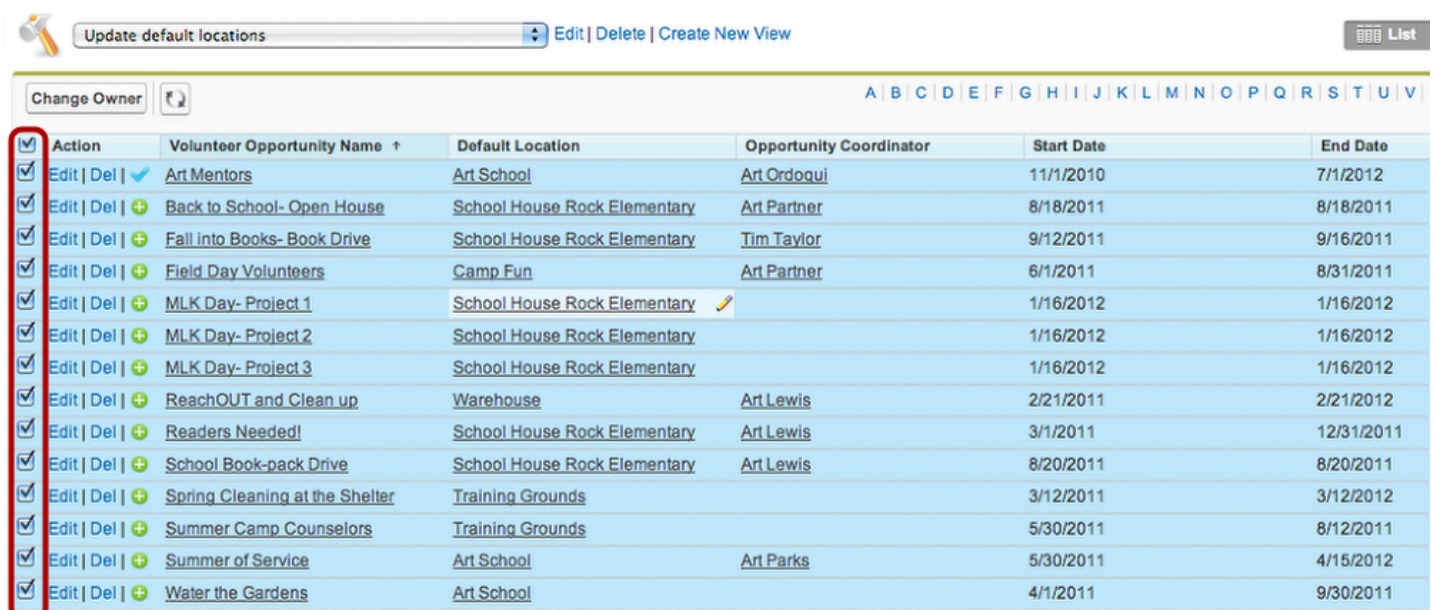
Reduce, Reuse, Recycle



While the views are helpful, things can get a little bit crowded if you create a new view each time you want to update new fields, so instead of creating a new view utilize the Edit option to set new filter parameters. This will help keep your view list more manageable!

Using views to update organizations, contacts and connections

In the previous lesson we showed you how to use the checkboxes to the left of a list view to select multiple records to edit

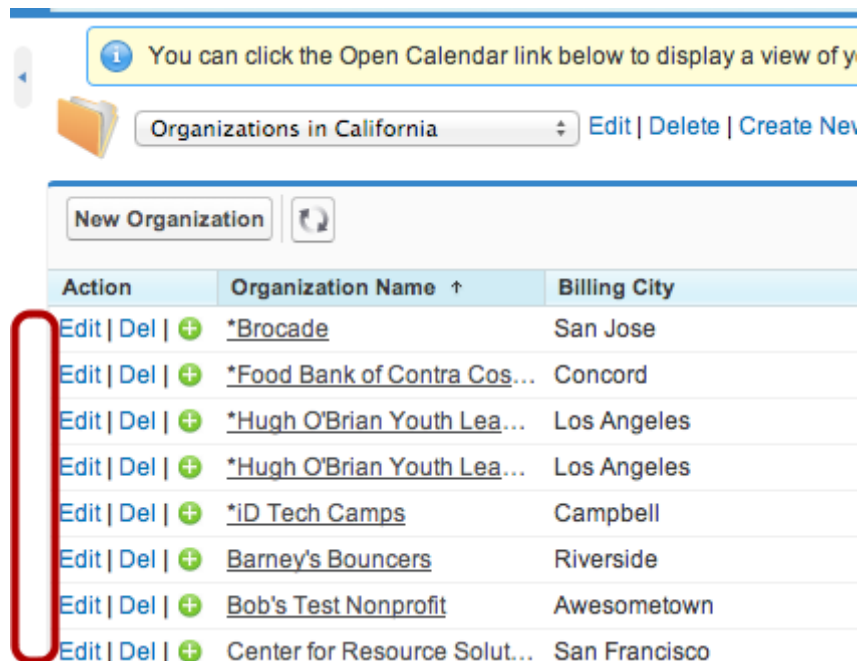


Update default locations Edit | Delete | Create New View List

Change Owner

	Action	Volunteer Opportunity Name ↑	Default Location	Opportunity Coordinator	Start Date	End Date
<input checked="" type="checkbox"/>	Edit Del	Art Mentors	Art School	Art Ordoqui	11/1/2010	7/1/2012
<input checked="" type="checkbox"/>	Edit Del	Back to School- Open House	School House Rock Elementary	Art Partner	8/18/2011	8/18/2011
<input checked="" type="checkbox"/>	Edit Del	Fall into Books- Book Drive	School House Rock Elementary	Tim Taylor	9/12/2011	9/16/2011
<input checked="" type="checkbox"/>	Edit Del	Field Day Volunteers	Camp Fun	Art Partner	6/1/2011	8/31/2011
<input checked="" type="checkbox"/>	Edit Del	MLK Day- Project 1	School House Rock Elementary		1/16/2012	1/16/2012
<input checked="" type="checkbox"/>	Edit Del	MLK Day- Project 2	School House Rock Elementary		1/16/2012	1/16/2012
<input checked="" type="checkbox"/>	Edit Del	MLK Day- Project 3	School House Rock Elementary		1/16/2012	1/16/2012
<input checked="" type="checkbox"/>	Edit Del	ReachOUT and Clean up	Warehouse	Art Lewis	2/21/2011	2/21/2012
<input checked="" type="checkbox"/>	Edit Del	Readers Needed!	School House Rock Elementary	Art Lewis	3/1/2011	12/31/2011
<input checked="" type="checkbox"/>	Edit Del	School Book-pack Drive	School House Rock Elementary	Art Lewis	8/20/2011	8/20/2011
<input checked="" type="checkbox"/>	Edit Del	Spring Cleaning at the Shelter	Training Grounds		3/12/2011	3/12/2012
<input checked="" type="checkbox"/>	Edit Del	Summer Camp Counselors	Training Grounds		5/30/2011	8/12/2011
<input checked="" type="checkbox"/>	Edit Del	Summer of Service	Art School	Art Parks	5/30/2011	4/15/2012
<input checked="" type="checkbox"/>	Edit Del	Water the Gardens	Art School		4/1/2011	9/30/2011

However in list views for connections, organizations, and contacts - you may find there is no check box.



Why is the checkbox not appearing? Does this mean you can't do bulk updates of a field for this object?

Checkboxes do not appear IF the object uses record types!

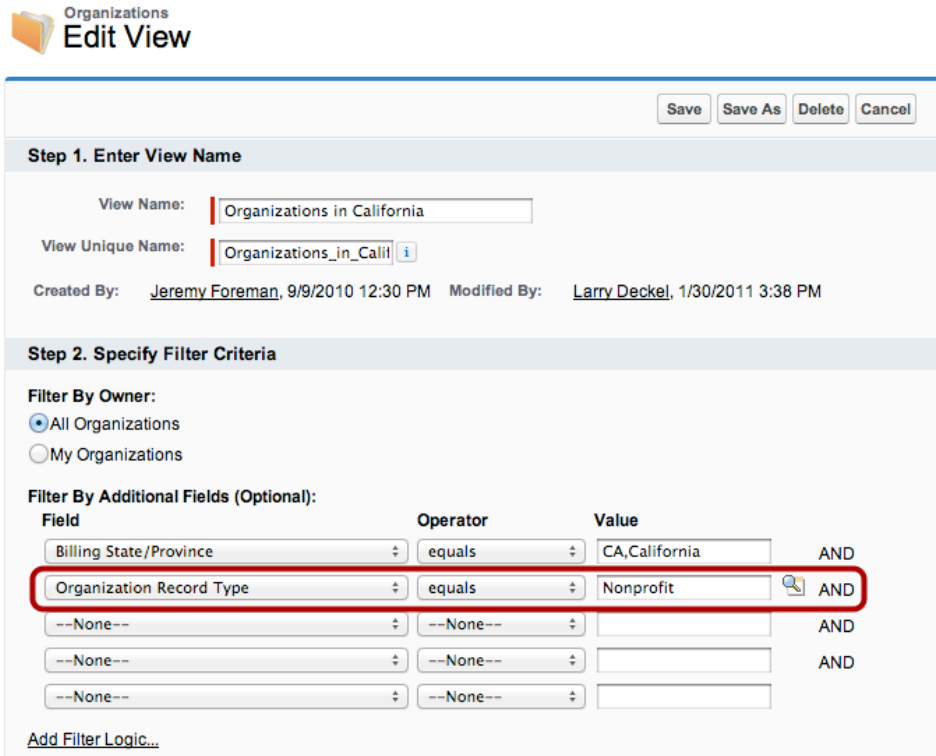
This is true of

Organizations (which has three record types: Individual, Business, and Nonprofit.

Contacts (which has only one record type: volunteer)

Connections (which have two record types: Managed and Self-Reported)

You must filter your list view to view ONLY one record type in order to get the checkboxes to appear so you can bulk update.



The screenshot shows the 'Organizations Edit View' interface. At the top, there are buttons for 'Save', 'Save As', 'Delete', and 'Cancel'. Below these, the 'Step 1. Enter View Name' section contains fields for 'View Name' (set to 'Organizations in California') and 'View Unique Name' (set to 'Organizations_in_Calif'). It also shows 'Created By: Jeremy Foreman, 9/9/2010 12:30 PM' and 'Modified By: Larry Deckel, 1/30/2011 3:38 PM'. The 'Step 2. Specify Filter Criteria' section includes 'Filter By Owner' with radio buttons for 'All Organizations' (selected) and 'My Organizations'. Below this is 'Filter By Additional Fields (Optional):' with a table of filter criteria. The table has columns for 'Field', 'Operator', 'Value', and a logical connector. The first row is 'Billing State/Province' with 'equals' and 'CA,California'. The second row, highlighted with a red box, is 'Organization Record Type' with 'equals' and 'Nonprofit'. The third and fourth rows are '--None--' with 'AND' connectors. At the bottom, there is a link 'Add Filter Logic...'.


Field	Operator	Value	
Billing State/Province	equals	CA,California	AND
Organization Record Type	equals	Nonprofit	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		



Make sure the filter view includes a filter on 'record type' for the object.


In organizations it is the field "Organization Record type", in Contacts it is "Contact record type", and in connections it is simply "Record Type"

Note: It is not the field named "Record_Type_Name"

Once you have filtered on the record type - the checkboxes will show up and you can do bulk update of selected field data.

 You can click the Open Calendar link below to display a view of your calendar unc

 Organizations in California  [Edit](#) | [Delete](#) | [Create New View](#)

[New Organization](#) 

<input type="checkbox"/>	Action	Organization Name ↑	Billing City	Billing State/Provi...
<input type="checkbox"/>	Edit Del +	*Food Bank of Con...	Concord	CA
<input type="checkbox"/>	Edit Del +	*Hugh O'Brian You...	Los Angeles	CA
<input type="checkbox"/>	Edit Del +	*Hugh O'Brian You...	Los Angeles	CA
<input type="checkbox"/>	Edit Del +	Barney's Bouncers	Riverside	CA
<input type="checkbox"/>	Edit Del +	Bob's Test Nonprofit	Awesometown	CA
<input type="checkbox"/>	Edit Del +	Center for Resourc...	San Francisco	CA

Importing Data

Importing Contacts in Salesforce

The main object that you may find yourself needing to import into Salesforce is Contacts.

Whether is a series of business cards, or a list of employees from an organization -- you may find it more efficient to IMPORT data via an import file - then to Enter the records one at a time into Salesforce.

Luckily Salesforce has native data management tools that are available to HandsOn Connect that make it easy to import (as well as to update) data records.

Salesforce Documentation

Since Importing Contacts, and for that matter organizations, is native Salesforce.com functionality. Salesforce has replaced its old method of importing data with its new "Data Import Wizard". [Here's Salesforce Help on working with the Data Import Wizard](#) to import contacts (as well as other objects) into Salesforce.

Creating the Import File

When importing contacts for use with HandsOn Connect here are the required and recommended columns that should be present in your .csv file.

Contact Required Fields

First Name

Last Name

Primary Address- Options are "Home" or "Business"

Primary Phone- Options are "Home" or "Business"

Note: Even if you don't provide a Phone number or address, these are required fields for the contact record so it will make it easier for you to manage the record later.

Volunteer Type- Options are Volunteer; Volunteer Leader; Team Captain; Disaster Response; RSVP; National Service. All records must contain Volunteer, in addition to any of the other types selected. Use a ; to separate the values chosen.

Organization Name- This should be the Salesforce ID of the organization you are going to map a contact to. You can choose to use the Salesforce.com ID (located in the URL of the record or accessible by a report) for the Organization record you want to associated them to. If you are using the 'bucket' model where contacts are associated with the organization

"Individual" - then use the Individual Organization ID. If you're using the household model (where a household account is created for each new contact... then leave the Organization Name field blank and the NPSP will automatically create the household account for each imported contact.

Contact Recommended (Optional) Fields

Email (required if you want to be able to grant volunteer, volunteer leader, or partner staff login access to the contact)

Phone (Business, Home, Mobile, or Other)

Age- If an Age is provided, the Date of Birth will be calculated. This field is only accessible to System Admins to import.

Birthdate- If you calculate this field based on the age then make sure to add an additional column called Calculated Birthdate and populate that column with the number 1 (which indicates "True")

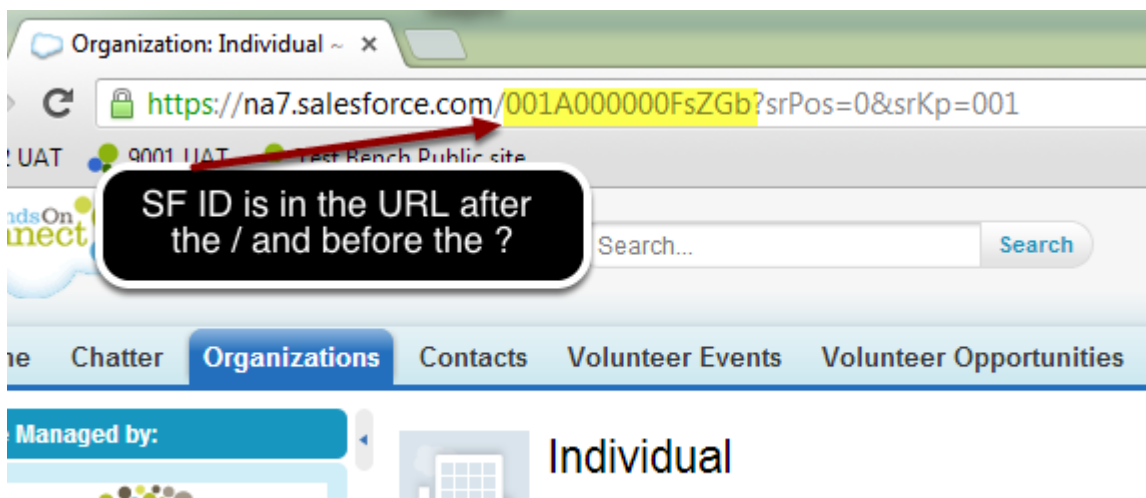
Registration Status- Options are Registered, Not Registered, and Pending (Team Confirmation)

Employer

Title

You can also opt to populate any of the additional fields present in the contact record such as Contact Type, Gender, Heard About Us?, etc. For a complete list of all the contact fields you can view the [field list](#) or look at the object directly in salesforce via **setup / customize / contacts / fields**

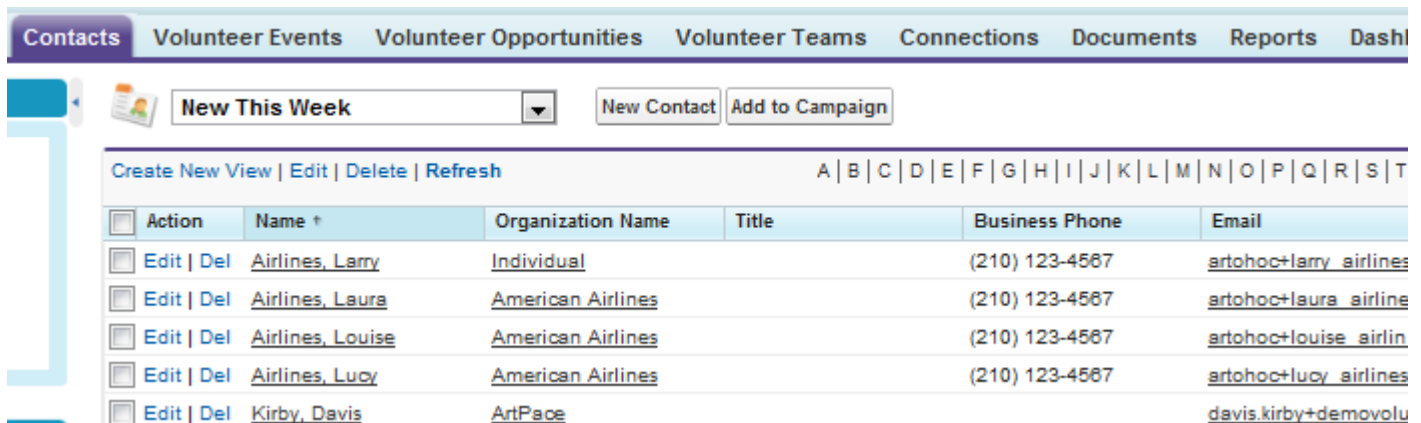
If you would like to have a template for your import file there is a blank report that you can export that contains the columns referenced above. Go to your Reports tab and search for **Contact Import Template** then export.



Importing Organizations/Contacts

Once you have the file ready to import, Go to Setup/ Data Import Wizard and follow the instructions there. It will guide you through the process of importing new contacts (or updating existing ones).

Confirmation of Imported Contact Records



The screenshot shows the Salesforce 'Contacts' tab with a table of imported records. The table has columns for Action, Name, Organization Name, Title, Business Phone, and Email. Five records are listed, all from 'American Airlines' with the phone number '(210) 123-4567'. The email addresses are variations of 'artohoc' followed by the contact's name and 'airlines'.

Action	Name	Organization Name	Title	Business Phone	Email
Edit Del	Airlines, Larry	Individual		(210) 123-4567	artohoc+larry_airlines
Edit Del	Airlines, Laura	American Airlines		(210) 123-4567	artohoc+laura_airline
Edit Del	Airlines, Louise	American Airlines		(210) 123-4567	artohoc+louise_airlin
Edit Del	Airlines, Lucy	American Airlines		(210) 123-4567	artohoc+lucy_airlines
Edit Del	Kirby, Davis	ArtPace			davis.kirby+demovol

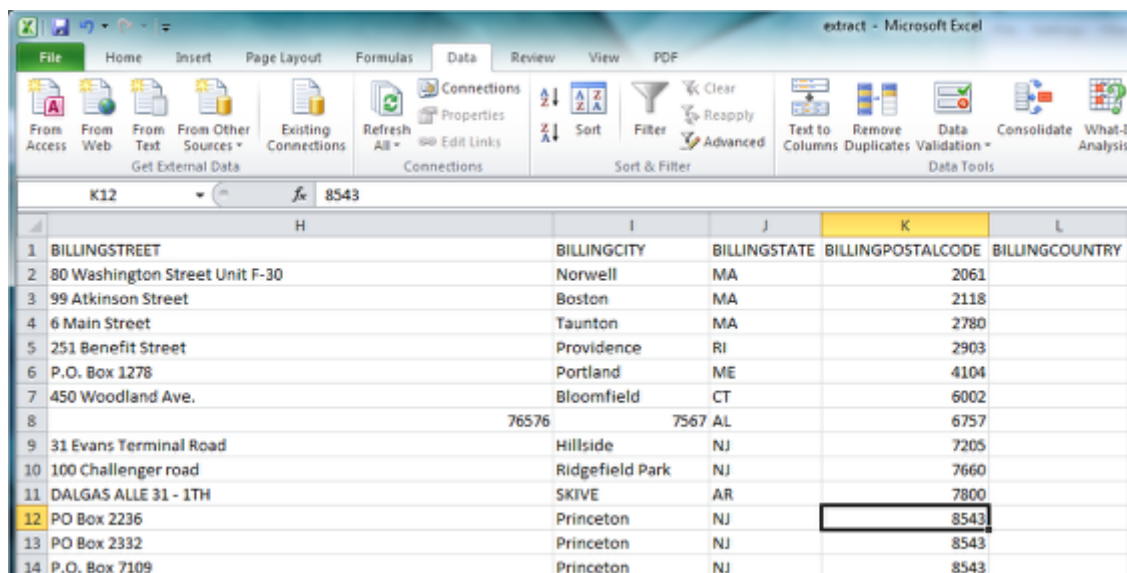
To verify that the imported data was mapped properly, you can go to the object and select the "New this Week" view from the dropdown and see that the organizations or contacts were imported correctly.

💡 **Best Practice:** When setting up a new import - do a 'test run' and import just 1 or 2 contacts. Make sure everything is working correctly. Then, when you're sure your import is working as expected — you can import as many contacts as you like!

Formatting Zip Code and Date / Time fields for importing into Salesforce

When importing data into Salesforce, it's important to have number fields formatted correctly. Imports will actually fail, if Date fields are not formatted properly. The two types of fields to watch out for are Zip Codes and Date / Times. When you open a csv using Microsoft Excel, Excel will apply a default formatting to these fields that is incorrect. Here is how you can avoid errors.

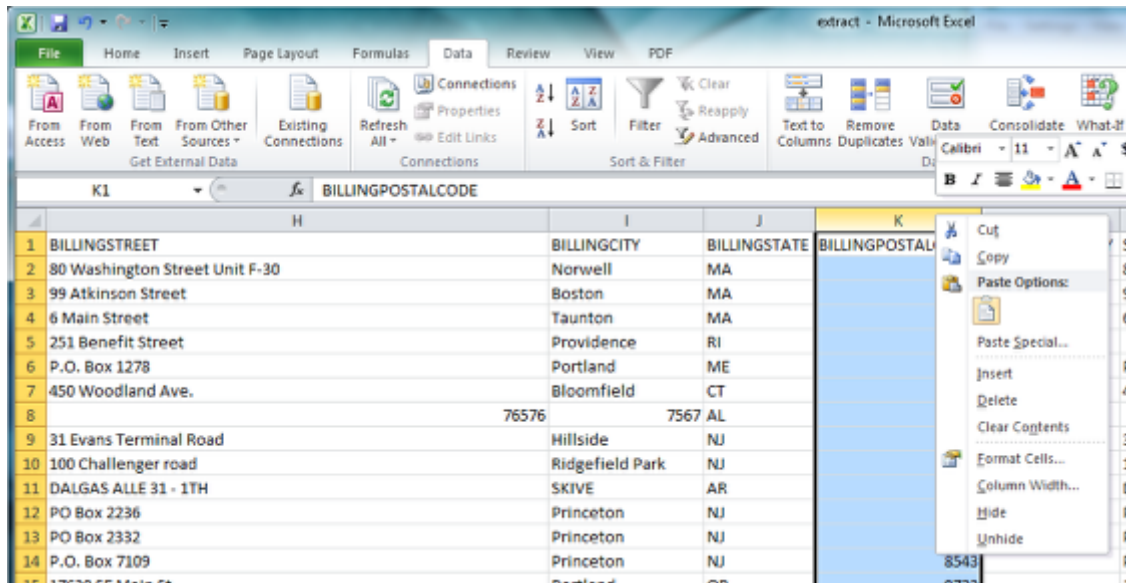
First, we open an Organizations csv file in Excel.



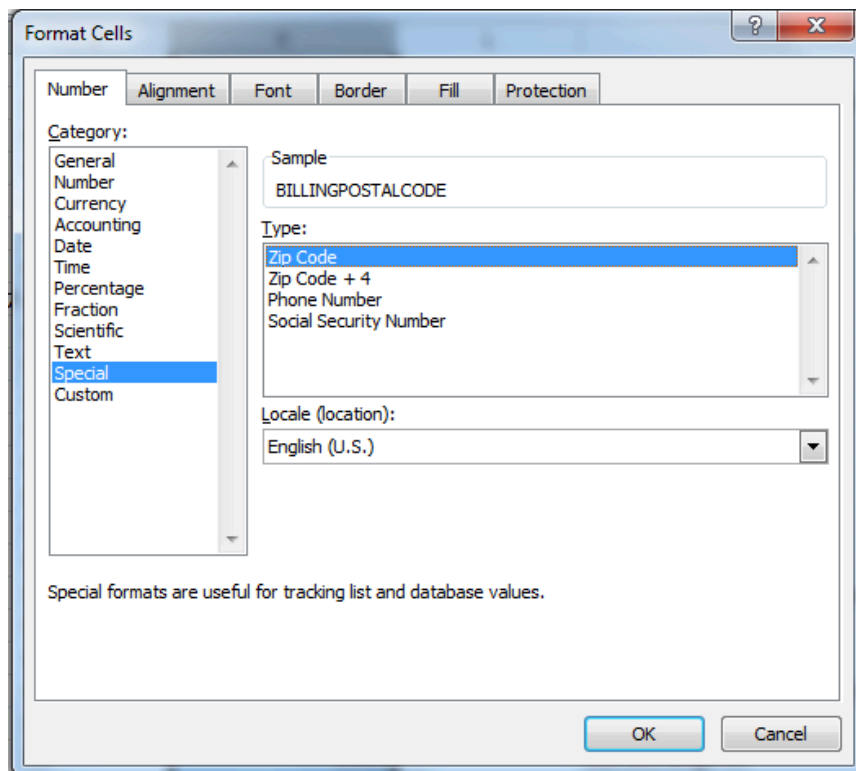
	H	I	J	K	L
	BILLINGSTREET	BILLINGCITY	BILLINGSTATE	BILLINGPOSTALCODE	BILLINGCOUNTRY
2	80 Washington Street Unit F-30	Norwell	MA	2061	
3	99 Atkinson Street	Boston	MA	2118	
4	6 Main Street	Taunton	MA	2780	
5	251 Benefit Street	Providence	RI	2903	
6	P.O. Box 1278	Portland	ME	4104	
7	450 Woodland Ave.	Bloomfield	CT	6002	
8		76576	7567 AL	6757	
9	31 Evans Terminal Road	Hillside	NJ	7205	
10	100 Challenger road	Ridgefield Park	NJ	7660	
11	DALGAS ALLE 31 - 1TH	SKIVE	AR	7800	
12	PO Box 2236	Princeton	NJ	8543	
13	PO Box 2332	Princeton	NJ	8543	
14	P.O. Box 7109	Princeton	NJ	8543	

Note that leading zeroes are removed from all Zip Codes. The Zip Code for Princeton, NJ should be 08543. Instead, we have 8543.

Right click the column and select Format Cells...



Pick the appropriate formatting.



Select the Number tab. Then select Special under Category and Zip Code under Type.

Now, Zip Codes are formatted properly.

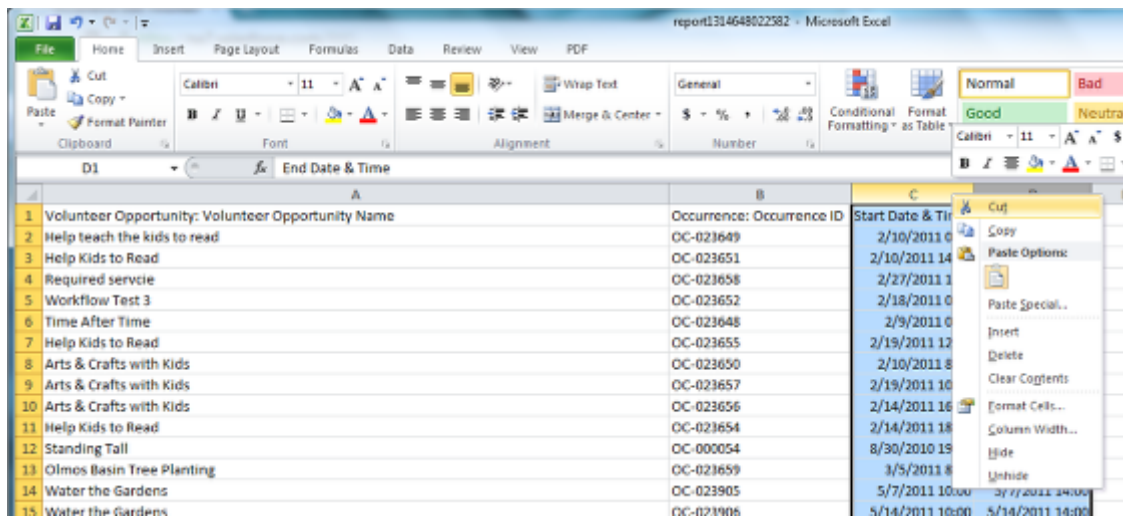
	H	I	J	K
1	BILLINGSTREET	BILLINGCITY	BILLINGSTATE	BILLINGPOSTALCODE
2	80 Washington Street Unit F-30	Norwell	MA	02061
3	99 Atkinson Street	Boston	MA	02118
4	6 Main Street	Taunton	MA	02780
5	251 Benefit Street	Providence	RI	02903
6	P.O. Box 1278	Portland	ME	04104
7	450 Woodland Ave.	Bloomfield	CT	06002
8		76576	7567 AL	06757
9	31 Evans Terminal Road	Hillside	NJ	07205
10	100 Challenger road	Ridgefield Park	NJ	07660
11	DALGAS ALLE 31 - 1TH	SKIVE	AR	07800
12	PO Box 2236	Princeton	NJ	08543
13	PO Box 2332	Princeton	NJ	08543
14	P.O. Box 7109	Princeton	NJ	08543
15	17630 SE Main St	Portland	OR	09723
16	2065 NW Miller Rd., #404	Portland	OR	09729
17	575 Eighth Avenue, 4th Floor	New York	NY	10018
18	123 Broadway	NYC	NY	10234
19	358 Saw Mill River Rd.	Millwood	NY	10546
20	1129 Westchester Ave, 3rd Fl	White Plains	NY	10604

Next, we open an Occurrence csv file in Excel

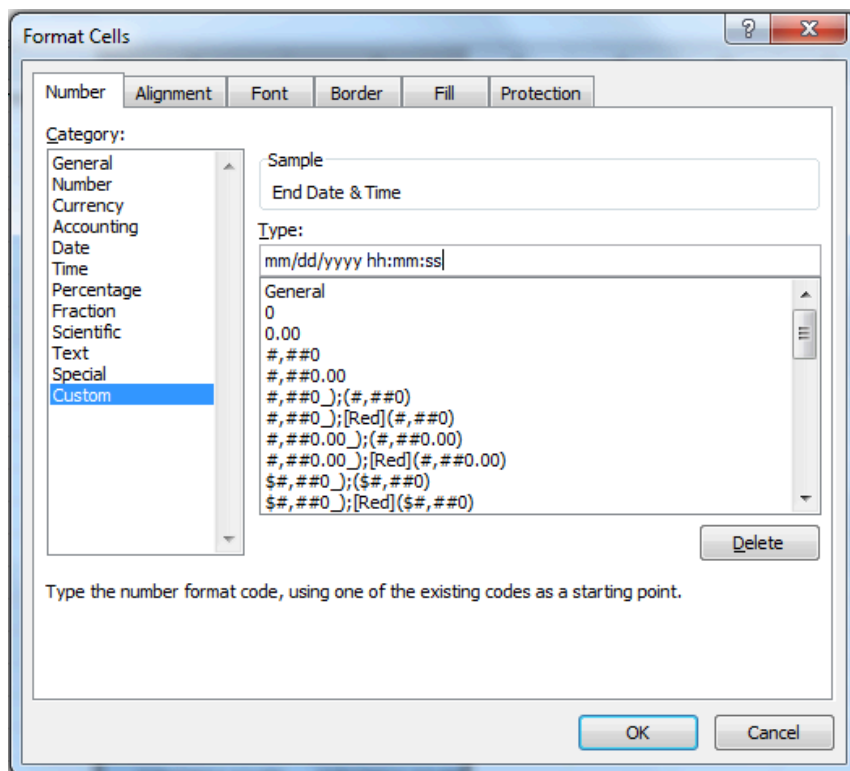
	A	B	C	D
1	Volunteer Opportunity: Volunteer Opportunity Name	Occurrence: Occurrence ID	Start Date & Time	End Date & Time
2	Help teach the kids to read	OC-023649	2/10/2011 0:00	12/30/2011 12:00
3	Help Kids to Read	OC-023651	2/10/2011 14:00	2/10/2011 16:00
4	Required servcie	OC-023658	2/27/2011 1:00	2/27/2011 6:30
5	Workflow Test 3	OC-023652	2/18/2011 0:00	2/18/2011 3:00
6	Time After Time	OC-023648	2/9/2011 0:00	2/28/2011 12:00
7	Help Kids to Read	OC-023655	2/19/2011 12:00	2/19/2011 14:00
8	Arts & Crafts with Kids	OC-023650	2/10/2011 8:00	2/10/2011 12:00
9	Arts & Crafts with Kids	OC-023657	2/19/2011 10:00	2/19/2011 12:00
10	Arts & Crafts with Kids	OC-023656	2/14/2011 16:00	2/14/2011 17:00
11	Help Kids to Read	OC-023654	2/14/2011 18:00	2/14/2011 20:00
12	Standing Tall	OC-000054	8/30/2010 19:00	8/30/2010 21:00
13	Olmos Basin Tree Planting	OC-023659	3/5/2011 8:00	3/5/2011 11:00
14	Water the Gardens	OC-023905	5/7/2011 10:00	5/7/2011 14:00
15	Water the Gardens	OC-023906	5/14/2011 10:00	5/14/2011 14:00
16	Water the Gardens	OC-023907	5/21/2011 10:00	5/21/2011 14:00
17	Water the Gardens	OC-023908	5/28/2011 10:00	5/28/2011 14:00
18	Water the Gardens	OC-023902	5/3/2011 21:00	5/3/2011 23:00
19	Water the Gardens	OC-023903	5/1/2011 21:00	5/1/2011 23:00
20	Water the Gardens	OC-023901	5/2/2011 8:00	5/2/2011 10:00
21	Water the Gardens	OC-023835	5/2/2011 11:00	5/2/2011 13:00
22	Water the Gardens	OC-023836	5/9/2011 11:00	5/9/2011 13:00

Note that the dates are formatted such that the time only includes hours and minutes. In order to import this data, Salesforce requires hours, minutes and seconds.

Right click the columns you want to format and select Format Cells...

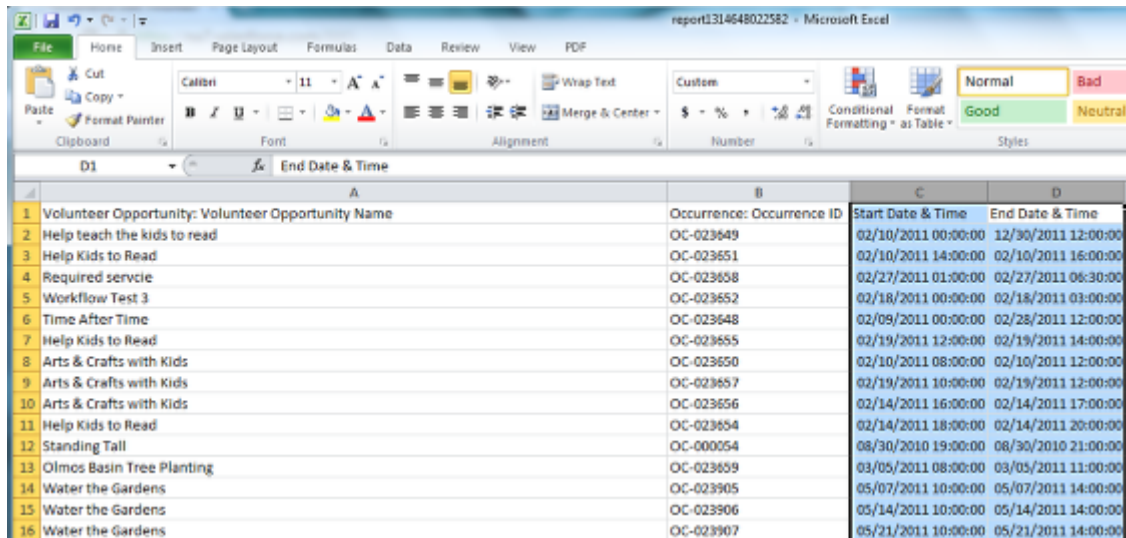


Enter the formatting that you want.



Click the Number tab and select Custom under Category. Enter "mm/dd/yyyy hh:mm:ss" under Type. You will have to enter this yourself. It will not be an option in the picklist.

Note that the fields are now formatted correctly.



	A	B	C	D
1	Volunteer Opportunity: Volunteer Opportunity Name	Occurrence: Occurrence ID	Start Date & Time	End Date & Time
2	Help teach the kids to read	OC-023649	02/10/2011 00:00:00	12/30/2011 12:00:00
3	Help Kids to Read	OC-023651	02/10/2011 14:00:00	02/10/2011 16:00:00
4	Required service	OC-023658	02/27/2011 01:00:00	02/27/2011 06:30:00
5	Workflow Test 3	OC-023652	02/18/2011 00:00:00	02/18/2011 03:00:00
6	Time After Time	OC-023648	02/09/2011 00:00:00	02/28/2011 12:00:00
7	Help Kids to Read	OC-023655	02/19/2011 12:00:00	02/19/2011 14:00:00
8	Arts & Crafts with Kids	OC-023650	02/10/2011 08:00:00	02/10/2011 12:00:00
9	Arts & Crafts with Kids	OC-023657	02/19/2011 10:00:00	02/19/2011 12:00:00
10	Arts & Crafts with Kids	OC-023656	02/14/2011 16:00:00	02/14/2011 17:00:00
11	Help Kids to Read	OC-023654	02/14/2011 18:00:00	02/14/2011 20:00:00
12	Standing Tall	OC-000054	08/30/2010 19:00:00	08/30/2010 21:00:00
13	Olmos Basin Tree Planting	OC-023659	03/05/2011 08:00:00	03/05/2011 11:00:00
14	Water the Gardens	OC-023905	05/07/2011 10:00:00	05/07/2011 14:00:00
15	Water the Gardens	OC-023906	05/14/2011 10:00:00	05/14/2011 14:00:00
16	Water the Gardens	OC-023907	05/21/2011 10:00:00	05/21/2011 14:00:00

Updating Data

Updating Data: General Overview

Salesforce has native data management tools that are available in HandsOn Connect that make it easy to update and import data records for use in HandsOn Connect.



From changing the Opportunity Coordinator for Volunteer Opportunities and Occurrences to populating custom fields such as local impact areas, 90% of your data management needs can be handled through the data management tools in Salesforce.

The one object that is not able to be imported or updated through Salesforce are Connections since they have two parent records, Volunteer Opportunities and Occurrences. For that you'll need an external tool: The Apex Data Loader. Use of the Data Loader is covered later in this training.

Updating Data is a matter of understanding a few principles and tools

1. Know which fields you need to work with!

Standard Fields						Standard Fields I	
Action	Field Label	Field Name	Data Type	Controlling Field	Track Histo		
	Created By	CreatedBy	Lookup(User)		<input type="checkbox"/>		
	Last Modified By	LastModifiedBy	Lookup(User)		<input type="checkbox"/>		
Edit	Owner	Owner	Lookup(User,Queue)		<input type="checkbox"/>		
	Volunteer Opportunity Name	Name	Text(80)		<input type="checkbox"/>		

Custom Fields & Relationships								Custom Fields & Relationships I	
		New Field Dependencies Set History Tracking							
Action	Field Label	API Name	Installed Package	Data Type	Controlling Field	Modified By	Track		
Edit Replace 	Activity Type	HOC__Activity_Type__c	HOC	Picklist	Type	Client Administrator , 7/8/2010 6:33 PM	<input type="checkbox"/>		
Edit Replace 	Age Groups Served	HOC__Age_Groups_Served__c	HOC	Picklist (Multi-Select)		Client Administrator , 7/8/2010 6:33 PM	<input type="checkbox"/>		

For a complete list of all the fields you may want to update and what values are appropriate, view the [field list](#) or look at the object directly in salesforce via **setup / app setup / customize / {object name} / fields** for standard objects, or **setup / app setup / create / objects /** and select the object in question.

The full information on all an object's fields can be found there.

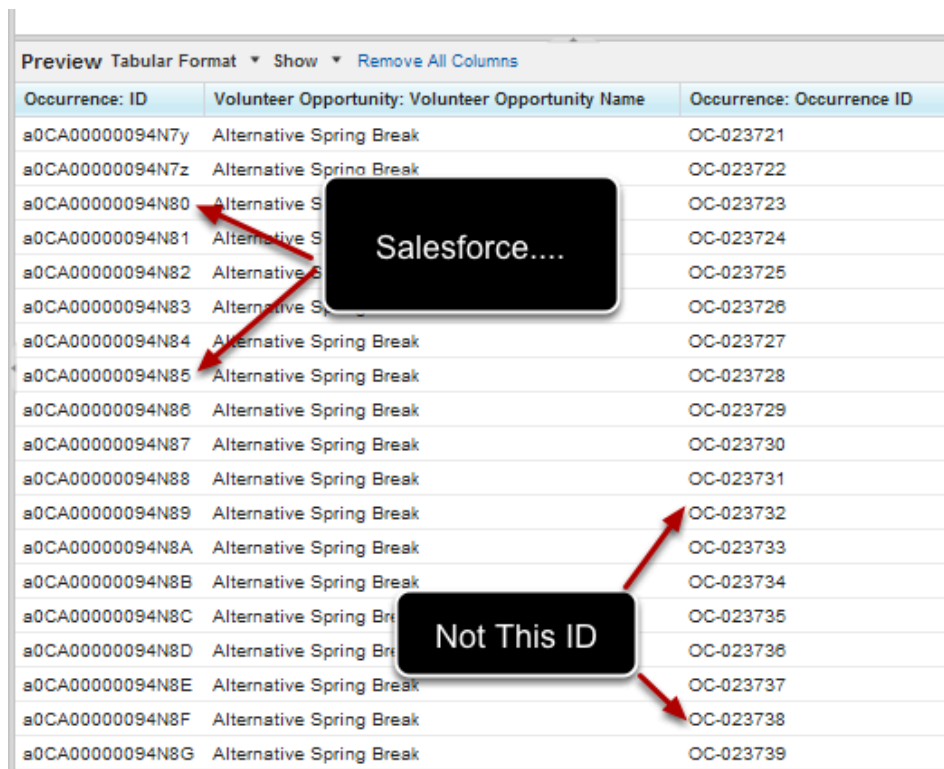
It is very important that you know the fields you have to work with, their picklist values, and how they are related.

For example if you are looking to update the Populations Served for the organization records, then make sure the values you are entering in the table to update those records are the correct picklist values in the system:

Example: There is a picklist value "Visitors & Travelers" which is a valid picklist value.

Do not update this field in any of the records to "Vistitors and travelers" -- it is not the same thing at all and will mess up search and reporting.

2. Create reports that output the fields you need for matching records, reference, and the field(s) you wish to update



Occurrence: ID	Volunteer Opportunity: Volunteer Opportunity Name	Occurrence: Occurrence ID
a0CA00000094N7y	Alternative Spring Break	OC-023721
a0CA00000094N7z	Alternative Spring Break	OC-023722
a0CA00000094N80	Alternative Spring Break	OC-023723
a0CA00000094N81	Alternative Spring Break	OC-023724
a0CA00000094N82	Alternative Spring Break	OC-023725
a0CA00000094N83	Alternative Spring Break	OC-023726
a0CA00000094N84	Alternative Spring Break	OC-023727
a0CA00000094N85	Alternative Spring Break	OC-023728
a0CA00000094N86	Alternative Spring Break	OC-023729
a0CA00000094N87	Alternative Spring Break	OC-023730
a0CA00000094N88	Alternative Spring Break	OC-023731
a0CA00000094N89	Alternative Spring Break	OC-023732
a0CA00000094N8A	Alternative Spring Break	OC-023733
a0CA00000094N8B	Alternative Spring Break	OC-023734
a0CA00000094N8C	Alternative Spring Break	OC-023735
a0CA00000094N8D	Alternative Spring Break	OC-023736
a0CA00000094N8E	Alternative Spring Break	OC-023737
a0CA00000094N8F	Alternative Spring Break	OC-023738
a0CA00000094N8G	Alternative Spring Break	OC-023739

If you can run a report you can update records.

The most important field when creating or running a report is to make sure that the **Salesforce.Com ID** is present in the export.

The Salesforce.com ID is the value that is use to prevent duplication of the records in the system, especially for custom objects like Volunteer Opportunities.

See this post on [how to determine which is the Salesforce.com ID](#)

Using the Salesforce ID will ensure that you don't accidentally create duplicates of existing data.

Once you have the correct Salesforce.com ID, then you can add additional fields to the report so you can ensure that you are dealing with the right record.

(i.e. the ID number won't mean anything to you, so you may want fields like Volunteer Opportunity Name, or other things you can interpret -- to ensure you are working with the right records.

Finally -- add the fields you wish to update to the report. Even if they don't have values now, you'll have all the columns you need to work with in the exported report.

This report is the **BEFORE** value of your data.

3. You will edit the exported report to update the fields you wish to change

You'll export the .csv file, and then edit the.csv file so that the new field values you wish to have are present! This is the way you want your data to look **AFTER** the update.

You'll import this file back into Salesforce to get the changed values to be put into the system.

4. Prevent Duplicates from being created

To prevent duplicate Volunteer Opportunity records from being created as a result of this import, choose Yes below.

Do you want to prevent duplicates from being created?

☐ No - insert all records in my import file.

☒ Yes - prevent duplicate records from being created. Note: You must select this option if you want to update existing records.

Which field on Volunteer Opportunity do you want to use for matching? [i](#)

☐ Volunteer Opportunity Name

☒ Salesforce.com ID [i](#)

☐ HOC ID (External ID) [i](#)

☐ Import ID (External ID) [i](#)

If existing records are found, what do you want to do? [i](#)

☐ Do not update existing records and only insert new records

☒ Update existing records and do not insert any new records

☐ Update existing records and insert new records

Salesforce.com ID is the surefire way to prevent duplicates. The system can't tell the difference between the Vol Opp "Office Assistant" with the Boys & Girls Club versus the one for the American Red Cross, so the SF.com ID makes sure that the right one gets updat...

When you import the file in you'll make sure the RIGHT records are updated, and that no duplicates are being created.

Caution:

Before you do an import of new records make sure that you have done your homework to ensure that the records you are importing don't already exist in your system. Especially when importing contacts and accounts.

For salesforce to find any duplicates based on Contact name, the contact has to be associated with the same organization record.

For example John Smith related to the organization Individual is not seen as the same John Smith associated with IBM, even if they have the same home address, phone number or email address. So to save yourself time merging records down the road, do your homework first to make sure you really are importing new records and not a duplicate.

5. Using the native tools in Salesforce you can't Import new records and update existing ones at the same time.

Running a report on existing data will allow you to update those records in the system.

If you wish to also import NEW records, you'll need to do this as a separate step.

To be able to update existing records and add new records at the same time, you'll need the 'upsert' capability found in the external application "[Apex Data Loader](#)"

Updating Data Example: Updating the Organization Name for Contacts

When a volunteer registers on the public site, they enter their Employer Name, but they are still assigned to the Organization Name: "Individual"

That's because their employer's name, may not already exist as an organization in our database. Or they might type a variation on the organization's name that couldn't be matched to an existing organization.

However, if a sponsor, let's say Target, asks us to provide data about all their employees volunteerism -- we might want to update the record of anyone who works for Target from individual to "Target". And we also want to update their contact type to "Employee"

To do this - we create a report to find who those contacts might be. We then export and update the data. And then import the corrected data back into Salesforce to update all the records.

Step 1: Create the Report

Create New Report

Select Report Type

Select Category

- Organizations & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contract Reports
- Price Books, Products and Assets
- Administrative Reports
- Other Reports

Select Report Type

- Organizations
- Organizations and Sponsor Group
- Contacts & Organizations
- Contacts & Organizations and Sponsor Group
- Organizations with Partners
- Organizations with Partners and Sponsor Group
- Organization with Organization Teams
- Organization with Organization Teams and Sponsor Group
- Organizations with Contact Roles
- Organizations with Contact Roles and Sponsor Group
- Organizations with Assets
- Organizations with Assets and Sponsor Group

Preview


Contact Report

Account Name	Contact Name	Title	Phone
Gene Point	Edna Frank	VP Technology	(212) 555-1234
Genwatt, Inc	Stella Pavlova	VP Operations	(415) 555-9826
Genwatt, Inc	Lauren Boyle	CEO	(310) 555-5678

We create a contacts and organizations report as we'll need info for both those objects.

Before we started, we considered what fields we would need for our report

We make sure the fields we need are present in the report we create:

 Employee and Organization Names

Report Generation Status: Complete

Report Options:

Summarize information by: None Show All organizations

Time Frame
Date Field: Created Date Range: Custom
From: 7/18/2009 To:

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

Filtered By: [Edit](#)
Employer contains **target** [Clear](#)

Contact ID	First Name	Last Name	Employer	Organization Name	Contact Type	Organization ID
003A000000pBnc8	Adeline	Paradise	Target.com	Individual	-	001A000000FsZGb
003A000000pBnV4	Susann	Porter	Target	Individual	-	001A000000FsZGb
003A000000pBnWL	Mark	Ott	Target, Inc.	Individual	-	001A000000FsZGb
003A000000pBnXA	Linda	Sprinkle	Target	Individual	-	001A000000FsZGb
003A000000pBy8Y	John	Target	Target	Target	Chief Executive	001A000000IuuDM
003A000000pBn9d	Michael	Gaona	Target, Inc.	Individual	-	001A000000FsZGb
003A000000pBn9e	Connie	Byrd	Target	Individual	-	001A000000FsZGb
003A000000pBnYH	Charles	Johnson	Target Store 333	Individual	-	001A000000FsZGb
003A000000pBncw	Maxine	Burr	Target Inc.	Individual	-	001A000000FsZGb
Grand Totals (9 records)						

I've created a report with the following fields:

- Contact ID (This is the Salesforce.com ID for the contact record)
- First Name
- Last Name
- Employer (a field I am going to 'filter on' to find the records I'm looking for)
- Organization Name (The field I want to update)
- Contact Type (The other field I want to update)
- Organization ID (so I can find the Organization ID to ensure I update the right organizational record)

I've filtered to get any records created in the last two years, and on any employer containing the word 'Target'.

Notice the report returns a lot of variations on target, as reported by the volunteer when they registered.

We can see also that they are currently associated with the organization Individual and have no contact type.

Only John Target, the Chief Executive seems to be associated with our Target Organization. Notice that his organization ID is different.

That is the Salesforce.com ID for our organization record for Target.

I can now export the data by clicking on export details.

Exporting the data

Employee and Organization Names

Export Report

Export File Encoding ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Export File Format Excel Format .xls

Export

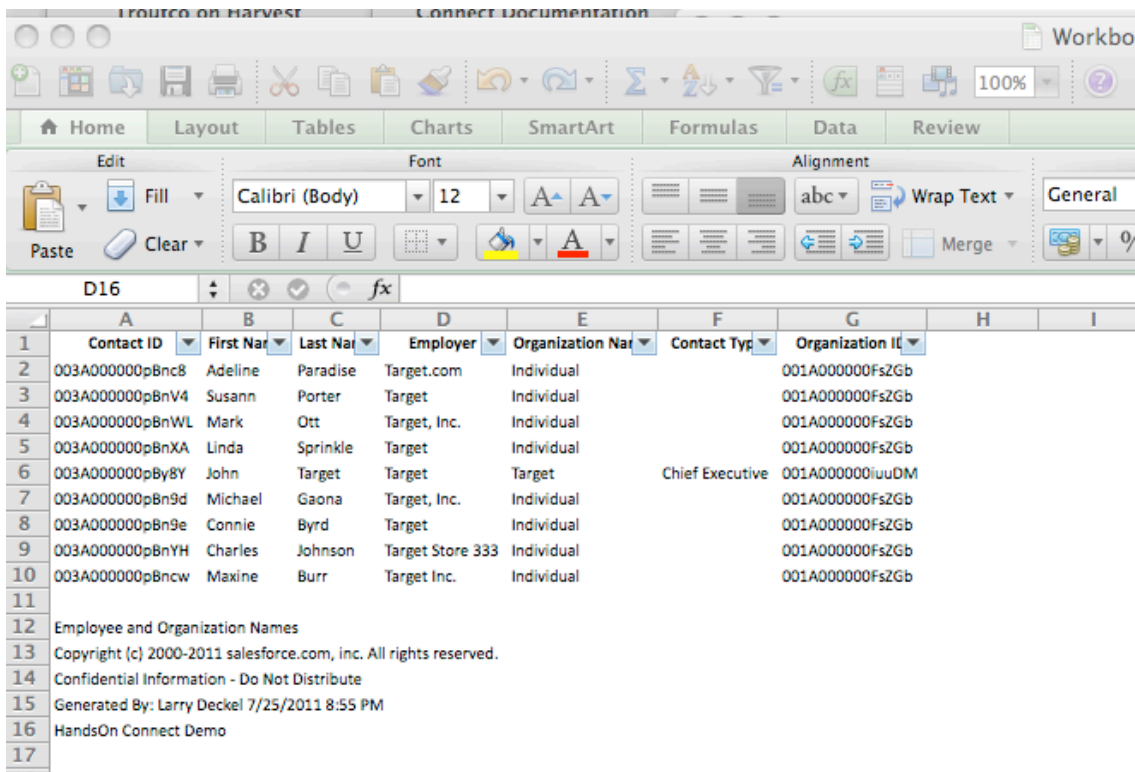
Done

I can choose to export the data as a .csv file or an excel file

I prefer to export the file as an excel file because on my system the .csv file appears as text in the browser, rather than automatically downloading a file I can open in excel.

I will have to convert the file to .csv before importing back into Salesforce however.

The resulting excel file can now be edited with the corrected information.



The screenshot shows an Excel spreadsheet with the following data:

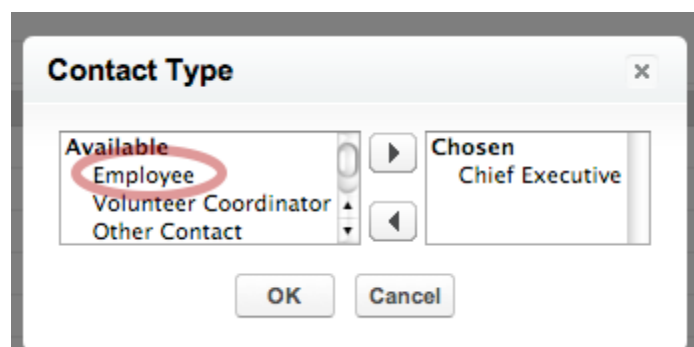
	A	B	C	D	E	F	G	H	I
	Contact ID	First Name	Last Name	Employer	Organization Name	Contact Type	Organization ID		
2	003A000000pBnc8	Adeline	Paradise	Target.com	Individual		001A000000Fs2Gb		
3	003A000000pBnV4	Susann	Porter	Target	Individual		001A000000Fs2Gb		
4	003A000000pBnWL	Mark	Ott	Target, Inc.	Individual		001A000000Fs2Gb		
5	003A000000pBnXA	Linda	Sprinkle	Target	Individual		001A000000Fs2Gb		
6	003A000000pBy8Y	John	Target	Target	Target	Chief Executive	001A000000iuuDM		
7	003A000000pBn9d	Michael	Gaona	Target, Inc.	Individual		001A000000Fs2Gb		
8	003A000000pBn9e	Connie	Byrd	Target	Individual		001A000000Fs2Gb		
9	003A000000pBnYH	Charles	Johnson	Target Store 333	Individual		001A000000Fs2Gb		
10	003A000000pBncw	Maxine	Burr	Target Inc.	Individual		001A000000Fs2Gb		
11									
12	Employee and Organization Names								
13	Copyright (c) 2000-2011 salesforce.com, inc. All rights reserved.								
14	Confidential Information - Do Not Distribute								
15	Generated By: Larry Deckel 7/25/2011 8:55 PM								
16	HandsOn Connect Demo								
17									

- 1) First I save the original file on my hard drive - in case I need to convert the data BACK the way it was! I do a "Save as" and save it now as a .csv file
- 2) You must delete the footer info in rows 12 - 16
- 3) I can now update the Organization Name for each organization to "Target", and update the contact type to each record to 'employee'

Note: I consult the picklist values and make sure that 'Employee' is a valid value, and that it uses an upper case 'E'. It must be an exact match.

Had I updated this to 'employee' it would import it, but skew my data reports as I'd now have some records with "Employee" and some with 'employee'.

Checking the contact type before updating the data:



My revised spreadsheet looks like this:

target_export_after.csv

	A	B	C	D	E	F	G	H
	Contact ID	First Name	Last Name	Employer	Organization Name	Contact Type	Organization ID	
2	003A000000pBnc8	Adeline	Paradise	Target.com	Target	Employee	001A000000iuuDM	
3	003A000000pBnV4	Susann	Porter	Target	Target	Employee	001A000000iuuDM	
4	003A000000pBnWL	Mark	Ott	Target, Inc.	Target	Employee	001A000000iuuDM	
5	003A000000pBnXA	Linda	Sprinkle	Target	Target	Employee	001A000000iuuDM	
6	003A000000pBy8Y	John	Target	Target	Target	Chief Executive	001A000000iuuDM	
7	003A000000pBn9d	Michael	Gaona	Target, Inc.	Target	Employee	001A000000iuuDM	
8	003A000000pBn9e	Connie	Byrd	Target	Target	Employee	001A000000iuuDM	
9	003A000000pBnYH	Charles	Johnson	Target Store 333	Target	Employee	001A000000iuuDM	
10	003A000000pBncw	Maxine	Burr	Target Inc.	Target	Employee	001A000000iuuDM	

I'm now ready to import the data back into Salesforce

Batch Updating the Records

Expand All | Collapse All

Quick Find

Personal Setup

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

App Setup


- Customize
 - Create
 - Develop
 - Deploy
- Installed Packages
- AppExchange Marketplace **New!**
- Critical Updates

Administration Setup

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- ☒ Data Management
 - Analytic Snapshots
 - [Import Accounts/Contacts](#)
 - Import Leads

Import Wizard for Accounts/Contacts

Use this wizard to import accounts and contacts for multiple users in your organization. You must be a salesforce.com administrator to use this wizard.



Steps to Import Your Organization's Data

1. **Familiarize** yourself with the Account & Contact fields available for import. Create custom fields or add custom picklist values if needed. [Tell me more!](#)
2. **Export** each of your users' data, and **merge** those files into a single CSV file using Excel or a similar product. [Tell me more!](#)
3. **Review** your data for accuracy, and **label** each column in the CSV file with the appropriate Account or Contact field name. [*Tell me more!](#)
4. **Add** a column titled "Record Owner", and add the user's salesforce.com username to this field in the format "jsmith@acme.com" or "Joe Smith". This ensures that each user's data is correctly owned by them in salesforce.com.
5. **Start the Import Wizard!** ←

*** It is recommended that you import a small test file of 5 records before importing all of your data to ensure that you have correctly prepared your import file.**

Go to **Setup / Admin Setup / Import Accounts/Contacts** to get the import wizard for accounts/contacts.

There are helpful tips on doing imports on the splash page.

Note that they recommend you import a small test tile of 5 records before importing, to ensure you have a correctly prepared import file. Good idea if you're doing a large update!

Click on "Start the Import Wizard to start!"

The wizard guides you through the 8 steps to import your data

Step 1 of 8: Create your import file

[Import Wizard](#)

Most applications (including Goldmine, Palm Desktop, Microsoft Excel, Microsoft Access and FileMaker) will allow you to export contact data into a **comma delimited text file** (.csv). To create an import file for your organization's account and contact data:

1. Export and merge all your contacts into a single csv file.
2. Using Microsoft Excel or a similar product, label each column in the file with the appropriate field name.
3. Specify the owner of each contact and account record with a special column labeled Record Owner.
4. Export the spreadsheet to a single csv file.
5. Once you have created a master csv file for accounts and contacts, click the Next button.

[Next >](#)

We've got step 1 done!

Step 2

Salesforce - Import Wizard for HandsOn Connect Demo

salesforce.com

Step 2 of 8: Upload your file [Import Wizard](#)

1. Click Browse and find the file to import into salesforce.com:
[Choose File](#) target_export_after.csv
2. The selection below is set to a default value. Override this default value only if your import file has a different character encoding.
ISO-8859-1 (General US & Western European, ISO-LATIN-1)
3. Contact Matching Type [i](#)
☒ Salesforce.com ID
☐ Name (Recommended)
☐ Email
4. Account Matching Type [i](#)
☒ Salesforce.com ID
☐ Name and Site (Recommended)
5. ☐ Trigger workflow rules for new and updated records
6. Choose account record type for import [Business](#)

[< Back](#) [Next >](#)

1. We choose our edited file.
2. Leave at default

3. We want to use the Salesforce.com ID (because in this case we have them). This will prevent duplicates
4. Salesforce.com ID for the Account matching type as well
5. We do not want to trigger workflows rules and send out emails to contacts
6. You can only update one account record type at a time. Target is Business!

Step 3

Step 3 of 8: Map Contact Fields Import Wizard

In the list below, select the field in your import file that should be imported into each salesforce.com field. Once you have finished, click **Next**:

[< Back](#) [Next >](#)

Contact Information
You should import into either the **Contact Full Name** or **First Name and Last Name**, but not both.

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Contact Id:	Contact ID (col 0)	Lead Source:	-- none selected --
Contact Full Name:	-- none selected --	Reports To:	-- none selected --
First Name:	First Name (col 1)	Birthdate:	-- none selected --
Last Name:	Last Name (col 2)	Assistant's Name:	-- none selected --
Salutation:	-- none selected --	Description:	-- none selected --
Title:	-- none selected --	Contact Note:	-- none selected --
E-mail Address:	-- none selected --	Email Opt Out:	-- none selected --
Department:	-- none selected --		
Fax Opt Out:	-- none selected --		

Contact Custom Fields

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Accepts Invitations:	-- none selected --	Age:	Not Accessible
Alternate Email:	-- none selected --	Availability:	-- none selected --
Background Check Completed:	-- none selected --	Calculated Birthdate:	-- none selected --
Communication Preferences:	-- none selected --	Contact Type:	Contact Type (col 5)
Court Ordered Volunteer:	-- none selected --	Date Minor Waiver Received:	-- none selected --
Disabled Person:	-- none selected --	Education Level:	-- none selected --
Employer:	Employer (col 3)	Employment Status:	-- none selected --
Ethnicity/Race:	-- none selected --	Gender:	-- none selected --
Goods and Services:	-- none selected --	HOC Domain Name:	-- none selected --
Heard About Us?:	-- none selected --	Old_Hours Served:	-- none selected --
Import ID:	-- none selected --	Interests:	-- none selected --
IsCustomerPortalUser:	-- none selected --	Marital Status:	-- none selected --
Max Distance for Invitations:	-- none selected --	Middle Name:	-- none selected --
Minor Waiver on File:	-- none selected --	Orientation Completed Date:	-- none selected --
Orientation Completed:	-- none selected --	Primary Address?:	-- none selected --

Because we've exported all the field labels - the mapping of fields will be automatic. We leave -- none selected -- for all the fields we are not importing.

Step 4: We are not importing any phone or address fields

Step 5: Map Account Fields

salesforce.com

Step 5 of 8: Map Account Fields Import Wizard

In the list below, select the field in your import file that should be imported into each salesforce.com field. **Make sure to select the checkbox below if you want existing account data in salesforce.com to be updated with data in your import file.** Once you have finished, click **Next**:

☒ Overwrite existing account values < Back Next >

Account Information

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Account Id:	Organization ID (col 6)	Website:	-- none selected --
Account:	Organization Name (col 4)	Ticker Symbol:	-- none selected --
Parent Account:	-- none selected --	Ownership:	-- none selected --
Account Number:	-- none selected --	Employees:	-- none selected --
Account Type:	-- none selected --	SIC:	-- none selected --
Industry:	-- none selected --	Account Note:	-- none selected --
Revenue:	-- none selected --	Description:	-- none selected --
Account Rating:	-- none selected --	Parent Account Site:	-- none selected --
Account Site:	-- none selected --		

Account Custom Fields

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Address Visibility:	-- none selected --	App Groups Served:	-- none selected --

Here we have to manually map, because our field "Organization ID" is equivalent to what Salesforce calls Organization ID.

The same is true with Organization Name and Account.

We also need to check the box to to overwrite the existing account data for these records.

We have nothing to update in **Step 6**.

Because we have mapped all our fields - there will be no choices available for **Step 7**.

Step 8 of 8: Review and Confirm ... Import Wizard

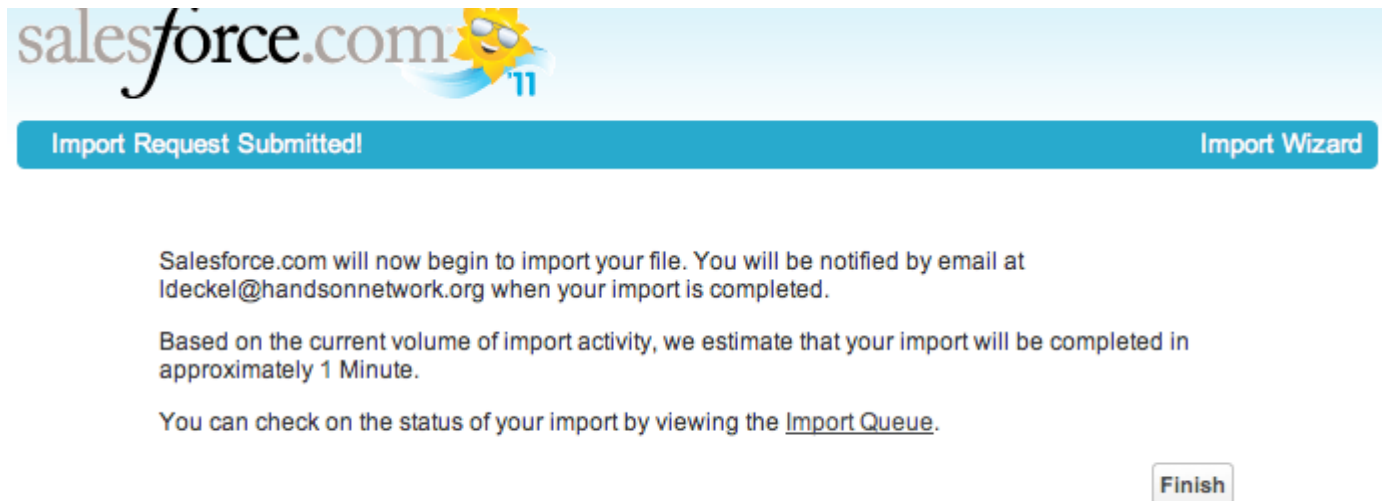
Press **Import Now!** to submit this import request to salesforce.com.

< Back Import Now!

We can now click **Import Now**.

We get a message telling us we'll be notified, and approximately how long it will take.

We can click on the Import Queue link to see how the import is going!



The screenshot shows the Salesforce.com interface with a blue header bar. Below the header, a blue banner reads "Import Request Submitted!" and "Import Wizard". The main content area contains the following text:

Salesforce.com will now begin to import your file. You will be notified by email at ldeckel@handsonnetwork.org when your import is completed.

Based on the current volume of import activity, we estimate that your import will be completed in approximately 1 Minute.

You can check on the status of your import by viewing the [Import Queue](#).

A "Finish" button is located at the bottom right.

You can also find the import queue log at **Setup / Admin Setup / Monitoring / Imports**.

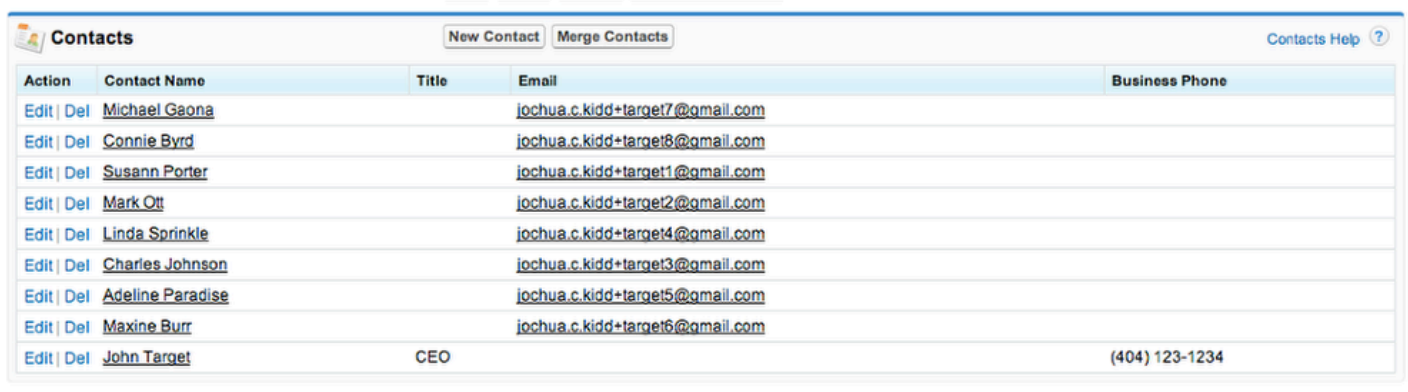
You can see when the import is completed

Import Queue for My Organization

[Help for this Page](#)

Action	Filename	Submitted By	Records	Submitted	Status	Started	Completed	Import Type
	target_export_after.csv	Larry Deckel	9	7/25/2011 9:33 PM	Completed	7/25/2011 9:34 PM	7/25/2011 9:34 PM	Contacts & Accounts
	update-orgs.csv	Josh Kidd	8	7/25/2011 10:30 AM	Completed	7/25/2011 10:30 AM	7/25/2011 10:30 AM	Contacts & Accounts
	update-connections.csv	Josh Kidd	8	7/25/2011 10:13 AM	Completed	7/25/2011 10:13 AM	7/25/2011 10:13 AM	Occurrences

If I go to the Target organizational record - I see all my contacts are now associated with the organization



The screenshot shows the Salesforce "Contacts" page for the "Target" organization. The page has a header with "Contacts", "New Contact", "Merge Contacts", and "Contacts Help". Below the header is a table with columns: Action, Contact Name, Title, Email, and Business Phone. The table lists several contacts, all with email addresses associated with the Target organization. The last contact, John Target, is highlighted.

Action	Contact Name	Title	Email	Business Phone
Edit Del	Michael Gaona		lochua.c.kidd+target7@gmail.com	
Edit Del	Connie Byrd		lochua.c.kidd+target8@gmail.com	
Edit Del	Susann Porter		lochua.c.kidd+target1@gmail.com	
Edit Del	Mark Ott		lochua.c.kidd+target2@gmail.com	
Edit Del	Linda Sprinkle		lochua.c.kidd+target4@gmail.com	
Edit Del	Charles Johnson		lochua.c.kidd+target3@gmail.com	
Edit Del	Adeline Paradise		lochua.c.kidd+target5@gmail.com	
Edit Del	Maxine Burr		lochua.c.kidd+target6@gmail.com	
Edit Del	John Target	CEO		(404) 123-1234

I can click on any of the contacts, and I'll see their contact type is now 'employee'.

Heard About Us?	
Contact Type	Employee
Volunteer Type	Volunteer
Volunteer Activity Type	

My update is now complete!

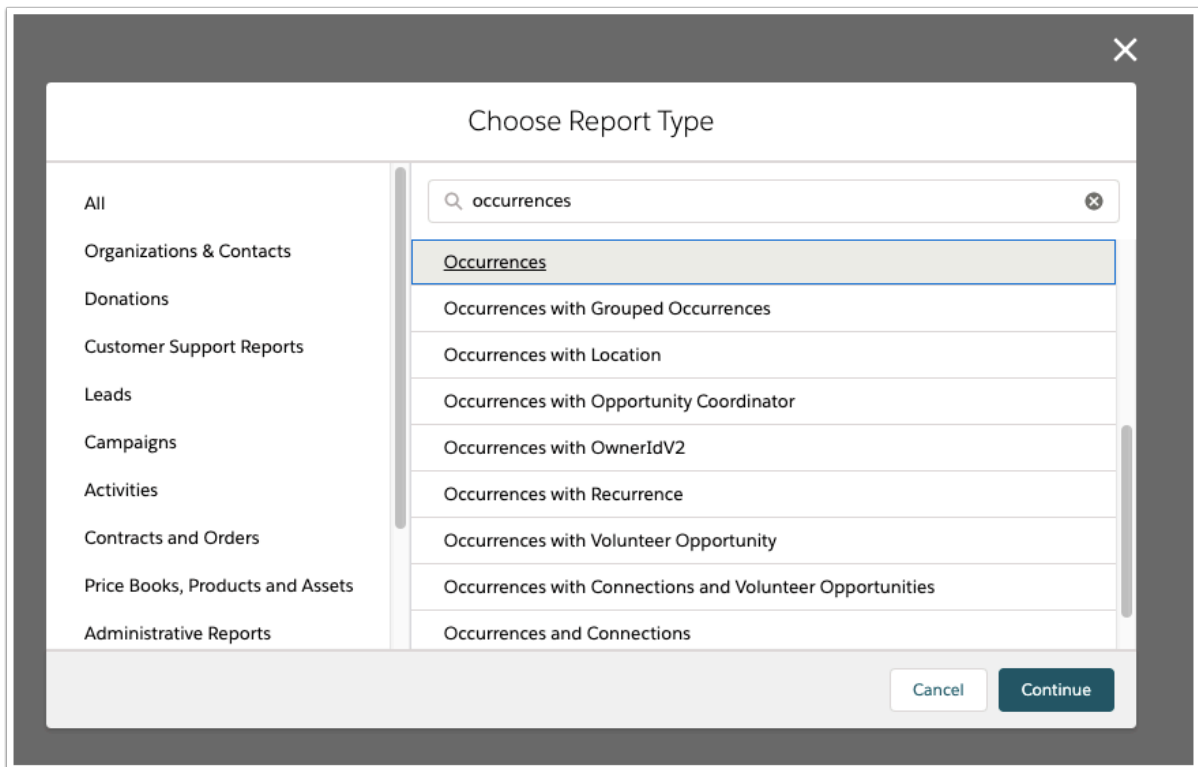
This same principle applies to any other kind of batch update.

Updating Occurrences Date & Time - Using the Import Wizard

Often you find yourself in a situation where you need to update the start or end dates for a number of occurrences associated with a Volunteer Opportunity.

Building the Report

The key to any data update is to build the correct report. For this example we will be creating a new report. From the Reports tab click on "Create New Report". On the Create New Report, type in "Occurrences" to create a report based on the Occurrence object, then click "Continue".



In the report itself make the following changes:

- 1) Show Me: All Occurrences
- 2) Date Field: End Date & Time
- 3) End Date & Time: Whatever criteria you choose. Leave at All Time to see all occurrences, or if you are updating future occurrences, change the range to Custom, use today's date as the Start Date and leave End Date blank. Click Apply.

5) Add Filter: Enter whatever filtering criteria you'd like such as Volunteer Opportunity, Recurrence, Managing Organization, etc. For this example we are filtering for the occurrences associated with the Volunteer Opportunity: Field Day Volunteers.

Volunteer Opportunity EQUALS Field Day Volunteers

The only column that is initially present is the Occurrence: Occurrence ID column. You can leave this in the table for easier reference or remove it if you prefer.

	Occurrence: Occurrence ID
1	OC-000286
2	OC-000287
3	OC-000288
4	OC-000289
5	OC-000290
6	OC-000291

6) Add these columns:

Occurrence: ID

Start Date & Time

End Date & Time

******Update all existing connections? In the event that the occurrences you are updating currently have active connections and you want the date information to be reflected on all of those existing connection, an additional data load must be made to those connections when using the Import Wizard.**

7) Once you have all the columns and desired filters, click on "Run" (You can save this report if you feel that you will be using it often to update occurrences and just modify the filters as needed the next time)

Once you've run the report, export it as a .csv file.

Report: Occurrences
New Occurrences Report

Search

Add Chart

Filter

Refresh

Edit

Save

Export

Total Records
1,033

	Occurrence: Occurrence ID	Occurrence: ID	Start Date & Time	End Date & Time	Update all the existing connections?
1	OC-000286	a1T2I000006y4p6	3/8/2024 11:00 AM	3/8/2024 5:00 PM	-
2	OC-000287	a1T2I000006y4p7	5/21/2023 11:00 AM	5/21/2023 5:00 PM	-
3	OC-000288	a1T2I000006y4p8	5/23/2023 11:00 AM	5/23/2023 5:00 PM	-
4	OC-000289	a1T2I000006y4p9	8/28/2024 11:00 AM	8/28/2024 5:00 PM	-
5	OC-000290	a1T2I000006y4pA	8/30/2024 11:00 AM	8/30/2024 5:00 PM	-
6	OC-000291	a1T2I000006y4pB	1/28/2020 11:00 AM	1/28/2020 5:00 PM	-
7	OC-001546	a1T2I000006y59Q	3/22/2021 11:00 AM	3/22/2021 5:00 PM	-

Export

Export View

Details Only

Export only the detail rows.
Use this to do further calculations or for uploading to other systems.

Format

✓ Excel Format .xls

Comma Delimited .csv

Encoding

ISO-8859-1 (General US & Western)

Cancel

Export

Open the file and make the necessary changes to the start and/or end dates & times.

Formatting the Date and Time columns

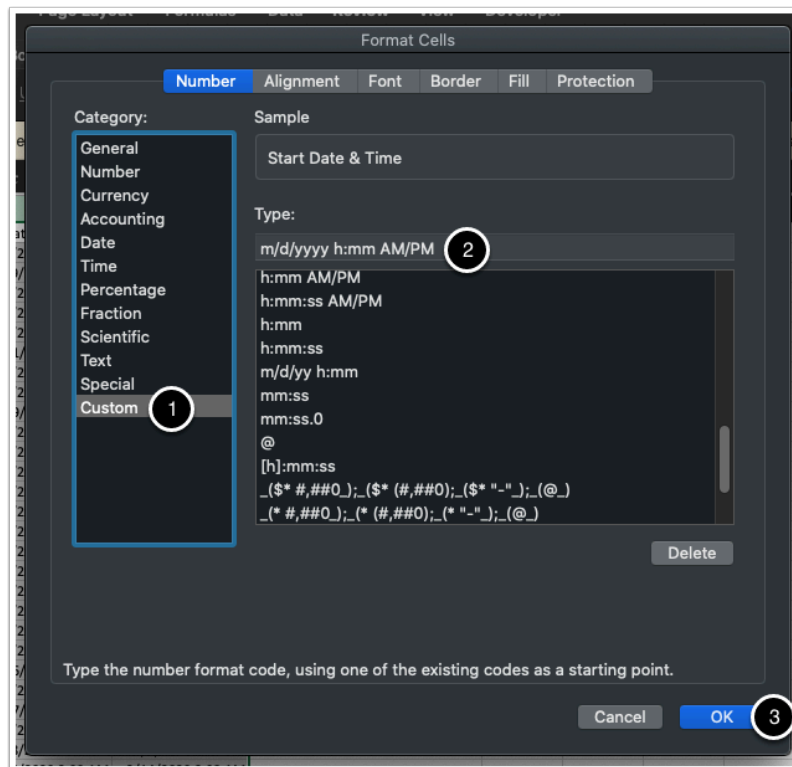
After you make the necessary updates to your data table, you need to ensure that the Date & Time fields are in the right format for salesforce to recognize the new values.

This note is from the [Salesforce.com Help & Training](#) post.

When importing Date/Time values into Salesforce using the import wizard, you cannot format the cells using the 24 hour clock. The import wizard requires the AM and PM nomenclature in the field. Do this by formatting the cells so that the mask used is: **m/d/yyyy h:mm AM/PM**

To do this in Excel, follow the instructions below:

1. Highlight the column in question.
2. Right click and select the "format cells".
3. Select the "custom" option and place your cursor in the Type field on top of the list and add the value:
m/d/yyyy h:mm AM/PM
5. When done, click OK, and your column will be properly formatted.



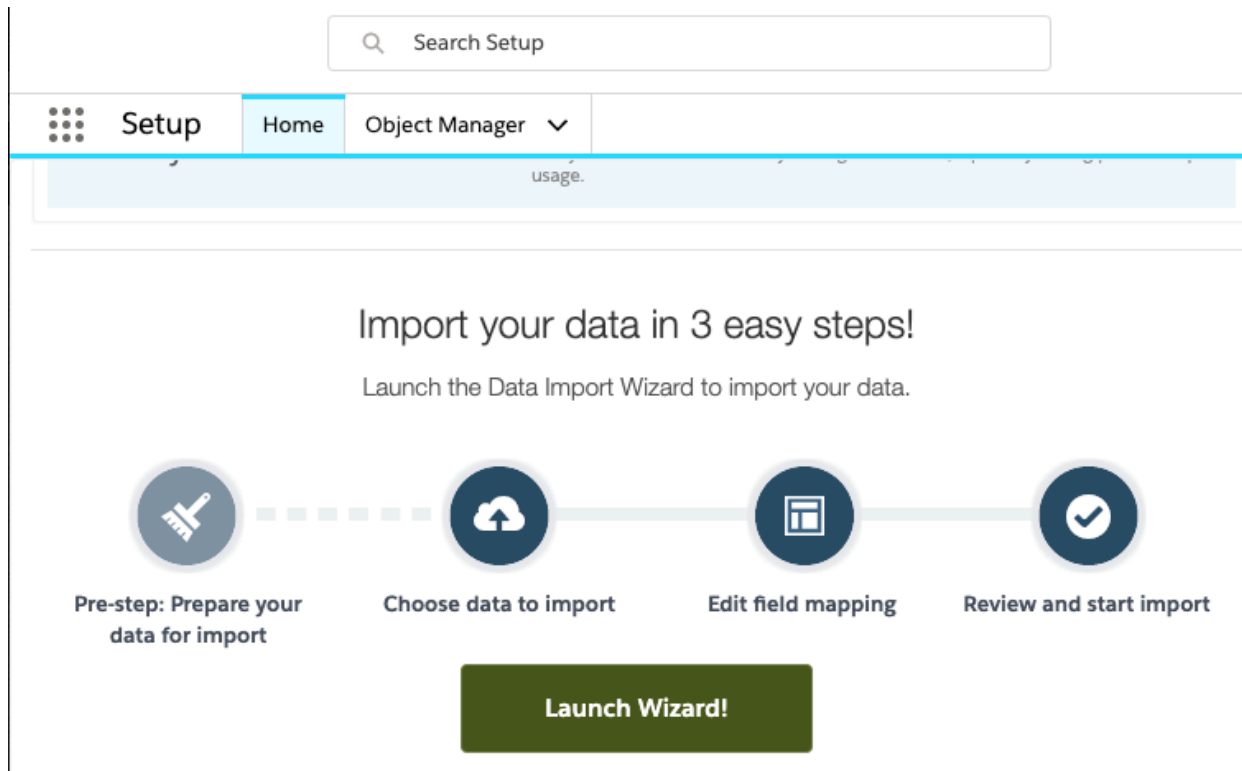
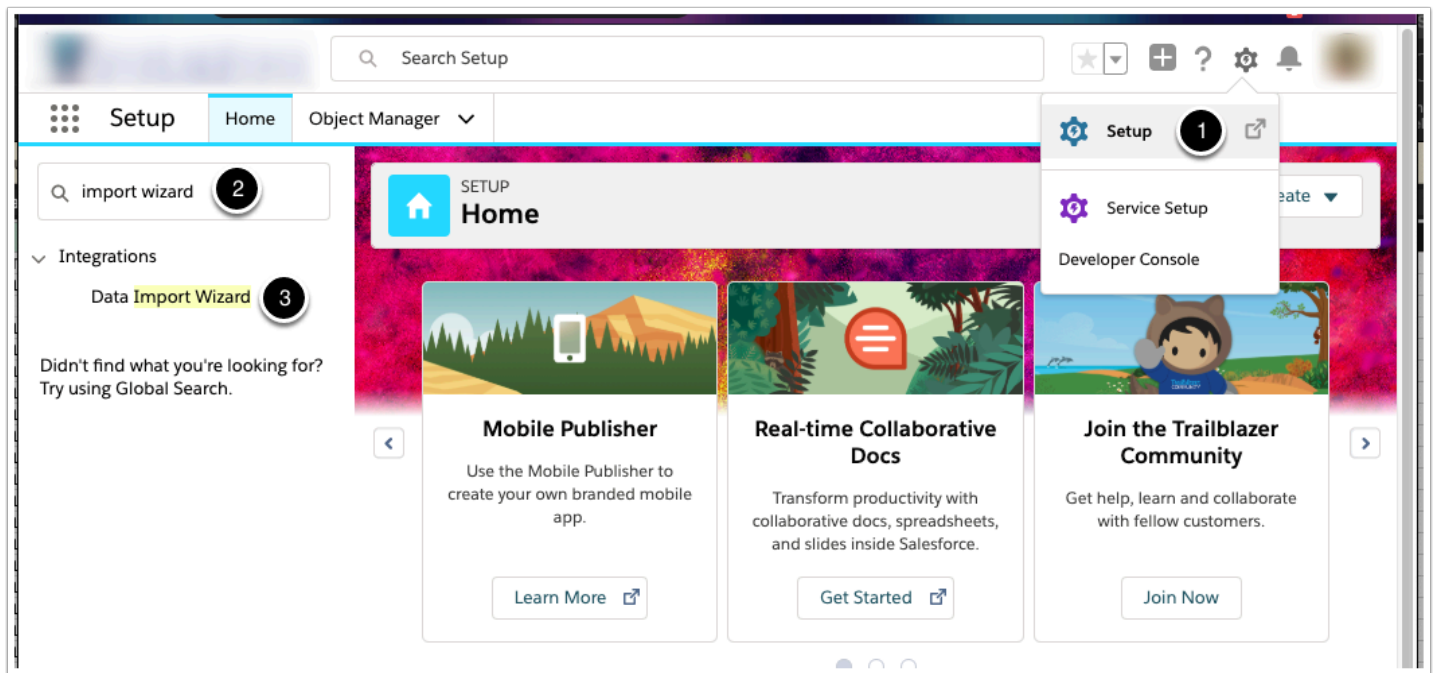
Now save your file and prepare to import the new dates and times.

Importing the Updated Data

We will use the Salesforce Import Custom Objects wizard.

Go to Setup then type Import Wizard in the quick find on the left.

Then click Launch Wizard! to begin.



1. Select the Custom objects tab and scroll to the Occurrences object. This list is not in alphabetical order, but in the order they exist in your instance. HandsOn Connect package objects will be grouped together.
2. Select to Update Existing Records
3. Match by Salesforce.com ID (this is the 15- or 18-digit unique ID from your file)

Since we are ONLY updating date information, the rest of those options can be left alone.

Getting closer ...

Choose data
Edit mapping
Start import

Import your Data into Salesforce

You can import up to 50,000 records at a time. [Help for this page](#)

What kind of data are you importing? ?

Standard objects
Custom objects 1

AccountContacts

CldExtCfgs

CldIns

Logs

POSyns

What do you want to do? ?

Add new records
>

Update existing records 2
✓

Match by? ?

Salesforce.com ID
3

Which User field in your file designates record owners? ?

--None--
v

Which Grouped Occurrence field in your file do you want to match against to set the Grouped Occurrences lookup field? ?

--None--
v

Where is your data located? ?

Drag CSV file here to upload

📄

CSV

Drop or select your file and click Next to continue to mapping your fields.

Where is your data located? ?

File

report1578249815923.csv

Character Code ?

ISO-8859-1 (General US & Western European, ISO-LATIN-1)
v

Values Separated By

Comma
v

📄

CSV

Cancel
Previous
Next

Setup

Home

Object Manager

Almost done

Choose data

Edit mapping

Start import

Edit Field Mapping: Occurrences

Help for this page

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Occurrence ID	Occurrence: ID	a1T2l000006y4	a1T2l000006y5	a1T2l000006y4pC
Change	Start Date & Time	Start Date & Time	1/28/2020 11:0	1/29/2020 3:00	1/30/2020 11:00 AM
Change	End Date & Time	End Date & Time	1/28/2020 5:00	1/29/2020 9:00	1/30/2020 5:00 PM

Cancel

Previous

Next

The auto mapping may LOOK perfect, but you must change the Occurrence ID and map it to the Salesforce.com ID. Type in salesforce.com into the Find Field box and be sure to click on the "X" to remove the Occurrence ID mapping. Click Map, followed by Next.

Almost done

Choose data

Edit mapping

Edit Field Mapping: Occurrences

Show errors

Edit	Mapped Salesforce Object	CSV Header
Change	Occurrence ID	Occurrence: ID
Change	Start Date & Time	Start Date & Time
Change	End Date & Time	End Date & Time

Map your field: **Occurrence: ID**

Select field

Salesforce.com ID

Find field

Maximum Attendance

Minimum Attendance

Occurrence URL

Posting Status

Registration cutoff (hours)

Do NOT Send confirmation Email

Cancel

Map

Choose data

Edit mapping

Great job
Start import

Review & Start Import [Help for this page](#)

Review your import information and click Start Import.

Your selections:

Occurrences ✓

Update existing records ✓

✓

Your import will include:

Mapped fields

3

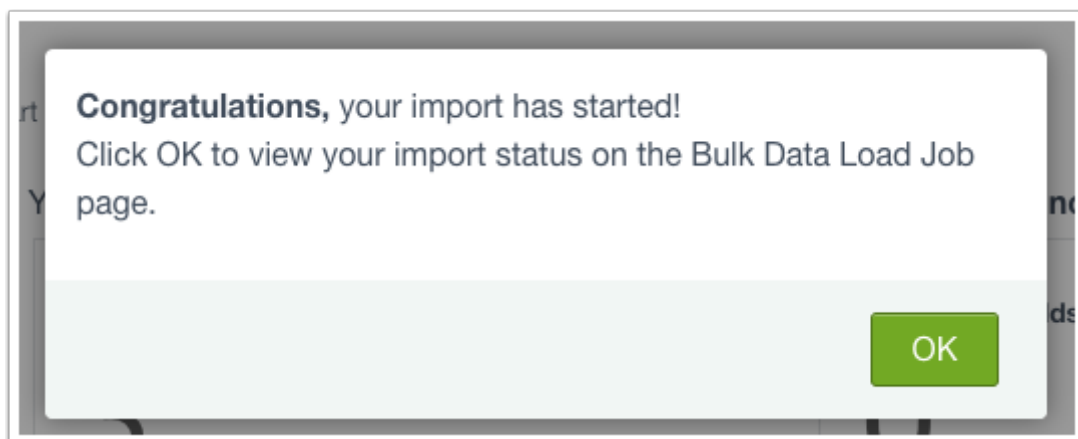
Your import will not include:

Unmapped fields


0

Cancel
Previous
Start Import

Click on Start Import and you will be greeted with a "Congratulations, your import has started!" window. Click OK and you will be automatically taken to your Bulk Data Load Jobs page where you can see the status of your job.



On the Bulk Data Load Jobs page, you'll have an overview of the data load just completed using the Data Import Wizard.



SETUP

Bulk Data Load Jobs

Bulk Data Load Job

7502I00000KWRyd

[Help for this Page](#)

View the details of a bulk data load job.

[« Back to List: Bulk Data Load Jobs](#)

Bulk Data Load Job Detail

Reload

Job ID	7502I00000KWRyd	Job Type	Bulk V1	Status	Closed
Submitted By	Libby Ziemelis	Operation	Update	Total Processing Time (ms)	4939
Start Time	1/6/2020 12:53 PM EST	Queued Batches	0	API Active Processing Time (ms)	4632
End Time	1/6/2020 12:53 PM EST	In Progress Batches	0	Apex Processing Time (ms)	13487
Time to Complete ([hh:mm:ss])	00:05	Completed Batches	1		
Object	Occurrence	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	1028		
Concurrency Mode	Parallel	Records Failed	0		
API Version	47.0	Retries	0		

Reload

Advanced Data Management Tools for HandsOn Connect

Advanced Data Management Tools - overview

For system administrators and/or staff that do a lot of administrative handling of data -- there are a number of data management tools that can be enabled in HandsOn Connect by your system administrator:

- Batch Creation of Teams from the contact record
- Batch creation of Connection from the contact record
- Import Team Members (making it possible to create team members from a report result)
- Import Connections - which makes it possible to import connections for team members
- Batch Moving or Copying of Connections (from occurrence record)
- Adding occurrence connection contacts to a campaign (for use with a mass emailing tool that works with Salesforce Campaigns)

Batch Create Volunteer Teams and Connections

The screenshot shows the 'Contacts' tab in the HandsOn Connect interface. A table lists Delta Airlines employees with columns for Action, Name, Organization Name, and Title. Red annotations highlight the 'Create Connections' and 'Create Team Members' buttons in the top toolbar, and the 'Import' menu options (Import Connections, Import Team Members) in the bottom left. A text box notes: 'New search buttons and left side menu option for importing'.

Action	Name	Organization Name	Title
<input type="checkbox"/> Edit Del +	Z, Patch	Delta Airlines	
<input type="checkbox"/> Edit Del +	Carlino, Joseph	Delta Airlines	
<input type="checkbox"/> Edit Del +	Contact, Conrad	Delta Airlines	
<input type="checkbox"/> Edit Del +	Deckel, Larry EC	Delta Airlines	
<input type="checkbox"/> Edit Del +	Delta, Dave	Delta Airlines	Pilot
<input type="checkbox"/> Edit Del +	Delta, Don	Delta Airlines	Volunteer Relations
<input type="checkbox"/> Edit Del +	Leader, Peter	Delta Airlines	
<input type="checkbox"/> Edit Del +	Oursler, Tonya	Delta Airlines	
<input type="checkbox"/> Edit Del +	Stadleburg, Danny	Delta Airlines	
<input type="checkbox"/> Edit Del +	Volunteer, Test	Delta Airlines	

To make it easier for you to manage **existing** contacts we have added two wizards, one for Team Members and one for Connections.

Turning a list of new contacts into a team and signing them up administratively. (Batch creation 101)

The trickiest administrative chore is administratively taking a list of NEW contacts, adding them to a team, and then making connections for the team members. This post shows you the quickest way to accomplish this using Salesforce's new import wizard, along with advanced features in HandsOn Connect to quickly create contacts, a team, add the contacts to the team, and then make team connections for them! It's a multi-step process but when you have the right steps down, it can become quick and easy.

If the contacts already exist in the system you do not need Steps 1 and 2 below. For more info see the posts [batch creating team members](#) and [batch creating connections](#)

In this scenario we are discussing the 'bare bones' approach. You have a list of names, and just want to connect them to a team and an opportunity (and don't expect them to ever log in, create accounts, or manage themselves.)

NOTE: For importing contacts, or any other object, you can find a [HOC Data Mapping Table here](#):



Contact_Upload_Template_minimum_for_teams.csv

One-Time Preparation:

The following should be done before your first import. These features and resources will be used each time you do this in the future. Once they're in place you're ready to go!

Your system Administrator should have enabled [batch create for Team Members and Connections](#). and given access to you as a user.

[Create a custom report to use for your team connection batch imports.](#)

Create a view called "Contacts Created Today" - that gives you quick and easy access to newly-imported contacts you wish to add to a team and connect to an occurrence.

Contacts Edit View

Save Save As Delete Cancel

Step 1. Enter View Name

View Name:

View Unique Name:

Created By: [Larry Deckel](#), 10/23/2013 3:36 PM Modified By: [Larry Deckel](#), 10/23/2013 3:36 PM

Step 2. Specify Filter Criteria

Filter By Owner: ☒ All Contacts ☐ My Contacts

Filter By Campaign (Optional): Campaign Name:

Filter By Additional Fields (Optional):

Field	Operator	Value	
Created Date	equals	TODAY	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

Step 3. Select Fields to Display

Available Fields	Selected Fields
Salutation	Name
First Name	Organization Name
Last Name	Title
Organization ID	Email
Organization Parent Organization	Contact Owner Alias
Reports To	

Add Up

Step 1: Use a .csv template to prepare your contacts for import.

A	B	C	D	E	F	G	H
FirstName	LastName	Contact: Organization Name	Contact: Primary Address?	Primary Phone?	Volunteer Type	Registration Status	Email
John	Smith	15 digit (ID number of your individual organization record)	Home	Home	Volunteer	Pending(Team Registration)	

Create a .csv template that has the fields you wish to import for your new contacts.

The only fields that are required for a contact for a team member are:

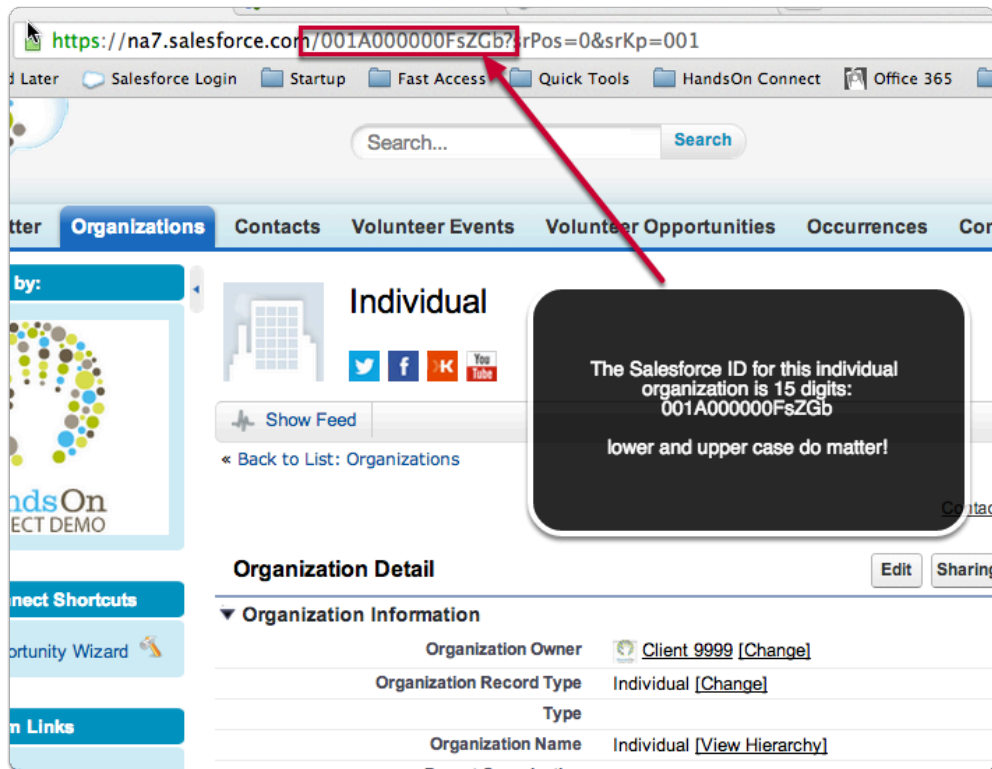
- FirstName
- LastName
- Contact: Organization Name (which should be the **salesforce ID** for the "Individual" organization (not it's name - since its a lookup field), (See screenshot below) [Note: if you have another organization you want to associate these contacts with, a business for example, then put in the ID of that organization instead of the individual organization.
- Contact: Primary Address? = Home
- Primary Phone? = Home
- Registration Status = Pending(Team Registration)
- Email (this field is optional - leave blank if unknown - but if you think the contact will ever log-in and want to create an account, then enter an email address)

Note: If there are other pending (team registration) contacts with the same name - importing here will create duplicate contacts.

You can, of course, add additional contact info if you desire -- but these are the minimums that are needed.

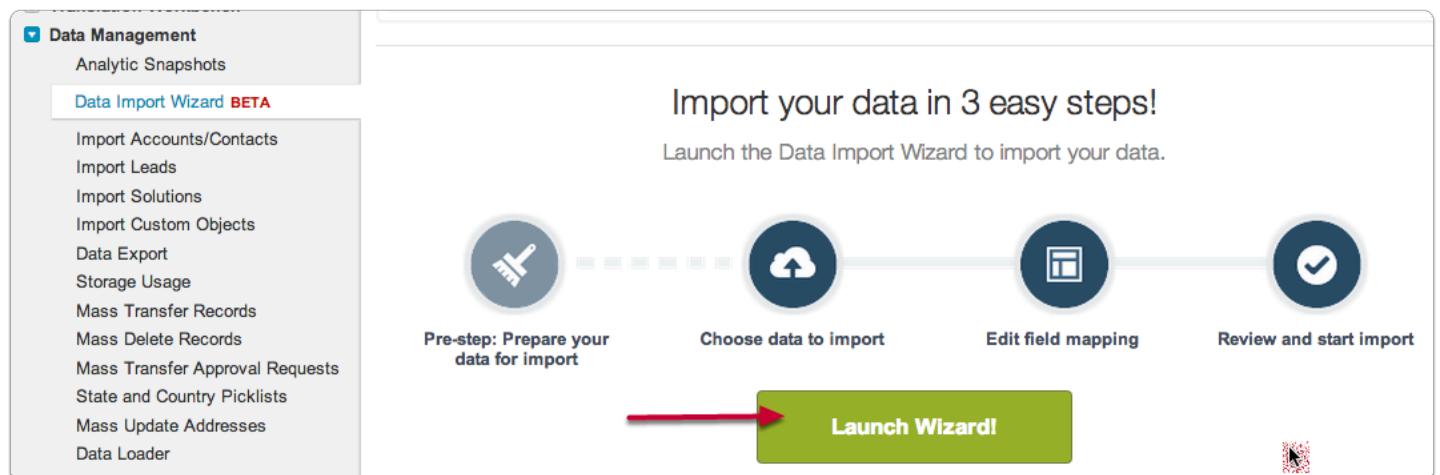
(To use, just update the FirstName and LastName in row 2 and all subsequent rows, and copy the values in columns C through G to all rows.)

Save the file as a .csv file.



Step 2: Import Data using the SF "Data Import Wizard" beta in the setup menu.

Click "Launch Wizard"



What kind of data are you importing: Organizations and Contacts

What do you want to do?: Add new and update existings records (do not trigger workflow rules) -- (This is because we are adding new contacts, but not new organizations!)

- Match contact by **name** (though if you have email addresses for ALL the records - then choose EMAIL here which will avoid creating duplicate contacts!)
- Match account by **Organization Name and Organization Site** (because we are not adding or updating any organization records)

Where is your data located: drag and drop your csv file - or choose it using the file picker.

Click the NEXT button

The screenshot shows the Salesforce Data Import Wizard interface. At the top, there's a progress bar with three steps: 'Choose data', 'Edit mapping', and 'Start import'. The 'Choose data' step is active. Below the progress bar, the title is 'Import your Data into Salesforce' with a sub-note 'You can import up to 50,000 records at a time.' and a 'Help for this page' link.

The main content area is divided into three columns:

- What kind of data are you importing?**: This column has two tabs, 'Standard objects' and 'Custom objects'. Under 'Standard objects', there are three options: 'Leads', 'Organizations and Contacts' (which is selected and highlighted with a red box), and 'Solutions'. Each option has a right-pointing arrow.
- What do you want to do?**: This column has three options: 'Add new records', 'Update existing records', and 'Add new and update existing records' (which is selected and highlighted with a red box). Below the selected option, there are two dropdown menus: 'Match Contact by:' with 'Name' selected, and 'Match Account by:' with 'Organization Name and Organization Site' selected. At the bottom, there's a checkbox for 'Trigger workflow rules?' which is unchecked.
- Where is your data located?**: This column has a dashed box at the top with the text 'Drag CSV file here to upload'. Below this, there's a list of CSV files. The first file, 'CSV', is selected and highlighted with a red box. It shows a 'File' section with 'Choose File' and 'trial_test.csv', and a 'Character Code' section with 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)' selected. Below this list, there are three other CSV file options: 'Outlook CSV', 'ACT! CSV', and 'GMail CSV'.

At the bottom right of the interface, there are three buttons: 'Cancel', 'Previous', and 'Next'. The 'Next' button is highlighted with a red box.

Edit Field Mapping:

If you used the attached import template, most of the fields will automatically be mapped.

The one that won't be mapped is Contact: Organization Name -- Click on **Map** and manually map as shown below.

(If you add additional contact fields - make sure you have the exact field name, or you can manually map the fields here)

Choose data

Edit mapping

Edit Field Mapping: Organizations and Contacts

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
<div>Map</div>	Unmapped ?	Contact: Organization Name	001A000000FsZ	001A000000FsZ	001A000000FsZGb
<div>Change</div>	Contact: Primary Address?	Contact: Primary Address?	Home	Home	Home
<div>Change</div>	Contact: Email	Email	acoco@gmail.co		
<div>Change</div>	Contact: First Name	FirstName	Art	Anthony	Able
<div>Change</div>	Contact: Last Name	LastName	Deco	Deco	Deco
<div>Change</div>	Contact: Primary Phone?	Primary Phone?	Home	Home	Home
<div>Change</div>	Contact: Registration Status	Registration Status	Pending(Team F	Pending(Team F	Pending(Team Registration)
<div>Change</div>	Contact: Volunteer Type	Volunteer Type	Volunteer	Volunteer	Volunteer

Click on Map and map Contact: Organization Name to Contact: Organization Name

Note: Do not map it to Organization: Organization Name. (it's the first one listed of the contact fields). Click on it. And then click the Map button to complete the mapping.

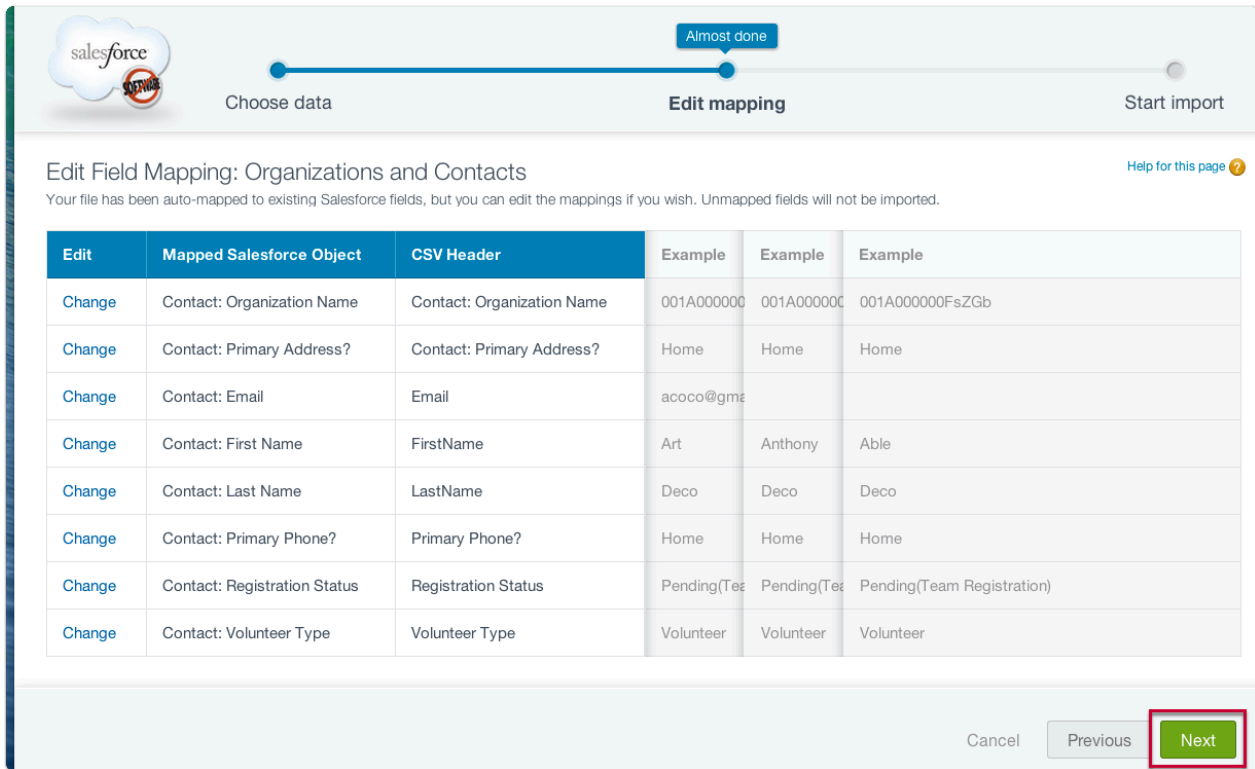
Edit Field Mapping: Organizations and Contacts
Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish.

Edit	Mapped Salesforce Object	CSV Header
Map	Unmapped ?	Contact: Organization Name
Change	Contact: Primary Address?	Contact: Primary Address?
Change	Contact: Email	Email
Change	Contact: First Name	FirstName
Change	Contact: Last Name	LastName
Change	Organization: Salesforce.com ID	Organization: Salesforce.com ID
Change	Contact: Primary Phone?	Primary Phone?
Change	Contact: Registration Status	Registration Status

Organization: For Business Description
Organization: Enable Business Page
Organization: Partner Approval Manager
Organization: LastModifiedByV2
Organization: ownerIdV2
Organization: Salesforce.com ID
Organization: Record Owner
Contact: Organization Name ✓
Contact: Name
Contact: First Name
Contact: Last Name
Contact: Salutation

Cancel
Map

Now that everything is mapped - click on 'next'



Almost done

Choose data Edit mapping Start import

Edit Field Mapping: Organizations and Contacts [Help for this page](#)

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

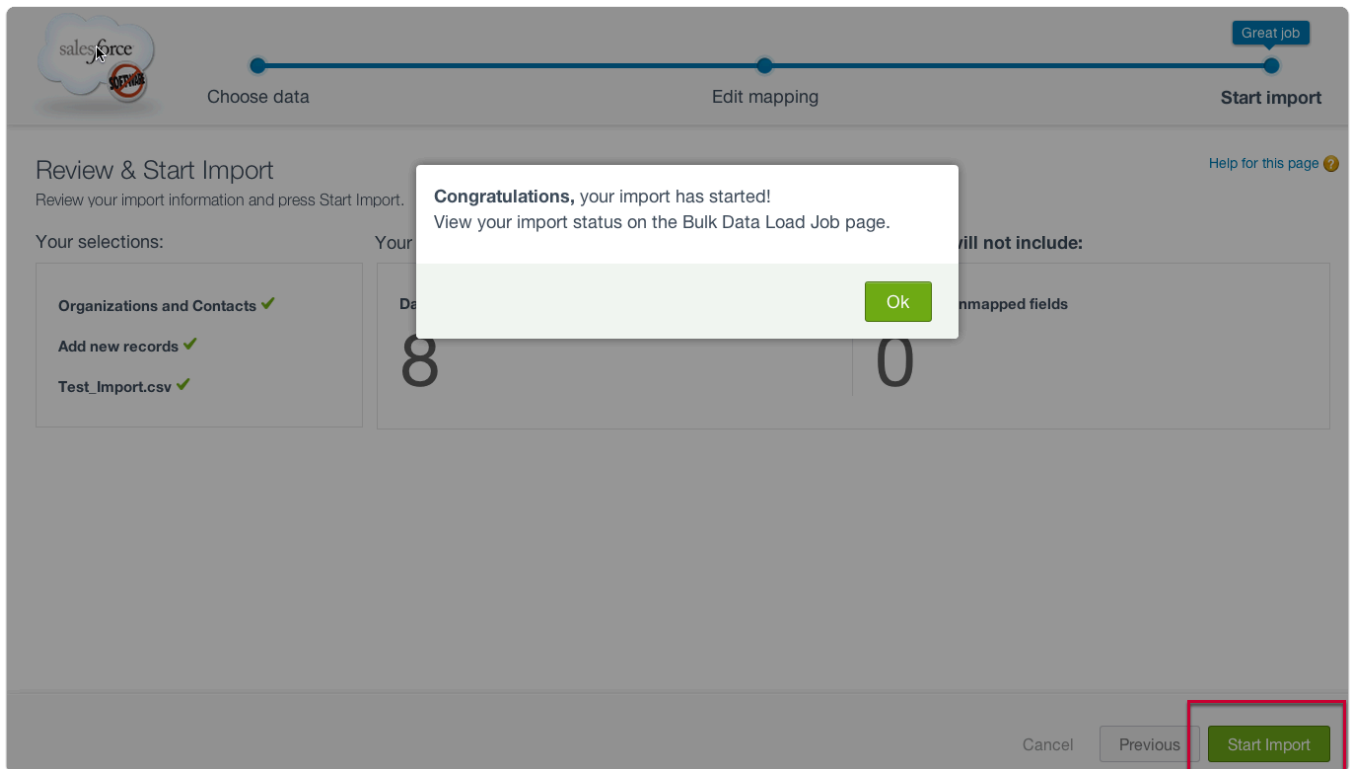
Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Contact: Organization Name	Contact: Organization Name	001A000000	001A000000	001A000000FsZGb
Change	Contact: Primary Address?	Contact: Primary Address?	Home	Home	Home
Change	Contact: Email	Email	acoco@gmail		
Change	Contact: First Name	FirstName	Art	Anthony	Able
Change	Contact: Last Name	LastName	Deco	Deco	Deco
Change	Contact: Primary Phone?	Primary Phone?	Home	Home	Home
Change	Contact: Registration Status	Registration Status	Pending(Te	Pending(Te	Pending(Team Registration)
Change	Contact: Volunteer Type	Volunteer Type	Volunteer	Volunteer	Volunteer

Cancel Previous **Next**

Review and Start Import

Click on the Start Import button and your contacts will be added to the system.

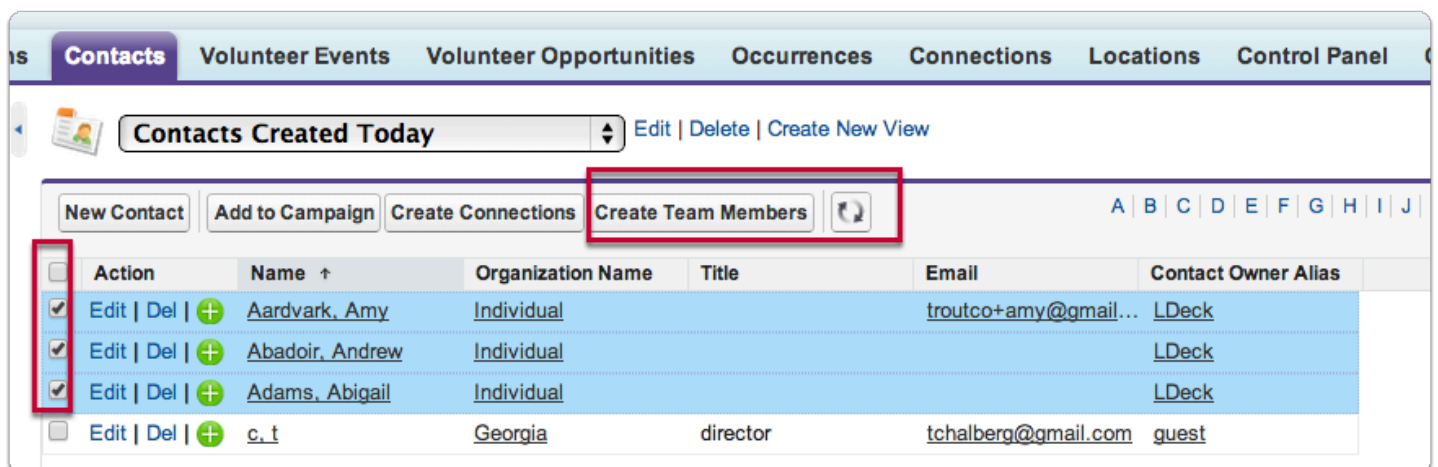
You'll automatically be taken to the Bulk Data Load Job Detail page where you can monitor the results of your import. (Click on "View Result" to see if you have any errors and your import succeeded.)



Step 3 - Use the Contacts View you've created to create your team and its member records:

Select the records you just created. (Note, in this example there were other records created. The one with a Contact Owner Alias of "guest" was a registration from the public site. So I don't select that. If you do this a lot - you can modify your view to ONLY show the contacts that have your Contact Owner Alias :-)

Click on the Create Team Members button.



If the team already exists, you can look it up. In our case, we're creating a new team, so we'll enter the team information.

The Organization optional - but if you want the team to be associated with an existing organization in the database you can add that info here.

Click the "Create Volunteer Team" button to create the team.

Step 2
Select the Volunteer Team

Create Volunteer Team Members Cancel

Select an existing Volunteer Team to associate the imported contact with:

Volunteer Team

OR

Create a Volunteer Team:

Volunteer Team Name

Organization

Visibility

Description

Create Volunteer Team

The team is automatically populated for you in the lookup field now.

Create the team members by clicking the Create Volunteer Team Members button.

Step 2

Select the Volunteer Team

Create Volunteer Team Members

Cancel

Select an existing Volunteer Team to associate the imported contact with:

Volunteer Team

Edison 5th Grade

OR

Create a Volunteer Team:

Volunteer Team Name

Organization

Visibility

Private

Description

Create Volunteer Team

Create Volunteer Team Members

Cancel

(Optional) Go to the team member record if you wish to designate one or more team members as the captain.

Note: They MUST have an email address associated with their contact record if you make them a team captain. You then should encourage them to register on the public site with the same email address so they can actually manage the team.

It is not necessary however for anyone to be a team captain if you're going to manage their connections administratively.

Volunteer Team
Edison 5th Grade

Customize Page | Edit Layout | Printable View | Help for this Page

« Back to List: Contacts

Volunteer Team Members (3) | Notes & Attachments (0)

Volunteer Team Detail [Edit](#) [Delete](#) [Clone](#)

▼ Information

Owner	Larry Deckel [Change]	Status	
Volunteer Team Name	Edison 5th Grade	Visibility	Private
Organization Text		Total Members	3
Organization	Edison School		
Hours Served	0.00		

▼ Description Information

Description This is a team of students from Edison School.

▼ Removed from staging page Layouts May 2013

Duration

▼ System Information

Created By [Larry Deckel](#), 10/23/2013 4:51 PM Last Modified By [Larry Deckel](#), 10/23/2013 4:53 PM

[Edit](#) [Delete](#) [Clone](#)

Volunteer Team Members [New Volunteer Team Member](#) [Volunteer Team Members Help](#)

Action	Team Member ID	Contact	Status	Hours Served	Captain
Edit Del	VTM-007515	Abigail Adams	Pending	0.00	<input type="checkbox"/>
Edit Del	VTM-007514	Amy Aardvark	Pending	0.00	<input type="checkbox"/>
Edit Del	VTM-007513	Andrew Abadoir	Pending	0.00	<input type="checkbox"/>

Step 4: Run and export the report needed to import connections for team members and save as a .csv file.

Customize the report by adding one filter to select the team name you wish to create connections for. Save, and then Export the report as a .csv file.

Batch Import Team Connections

Report Generation Status: Complete

Report Options:

Summarize information by: [--None--](#) Show [My volunteer teams](#)

Time Frame

Date Field [Volunteer Team: Created Date](#) Range [Custom](#)

From To

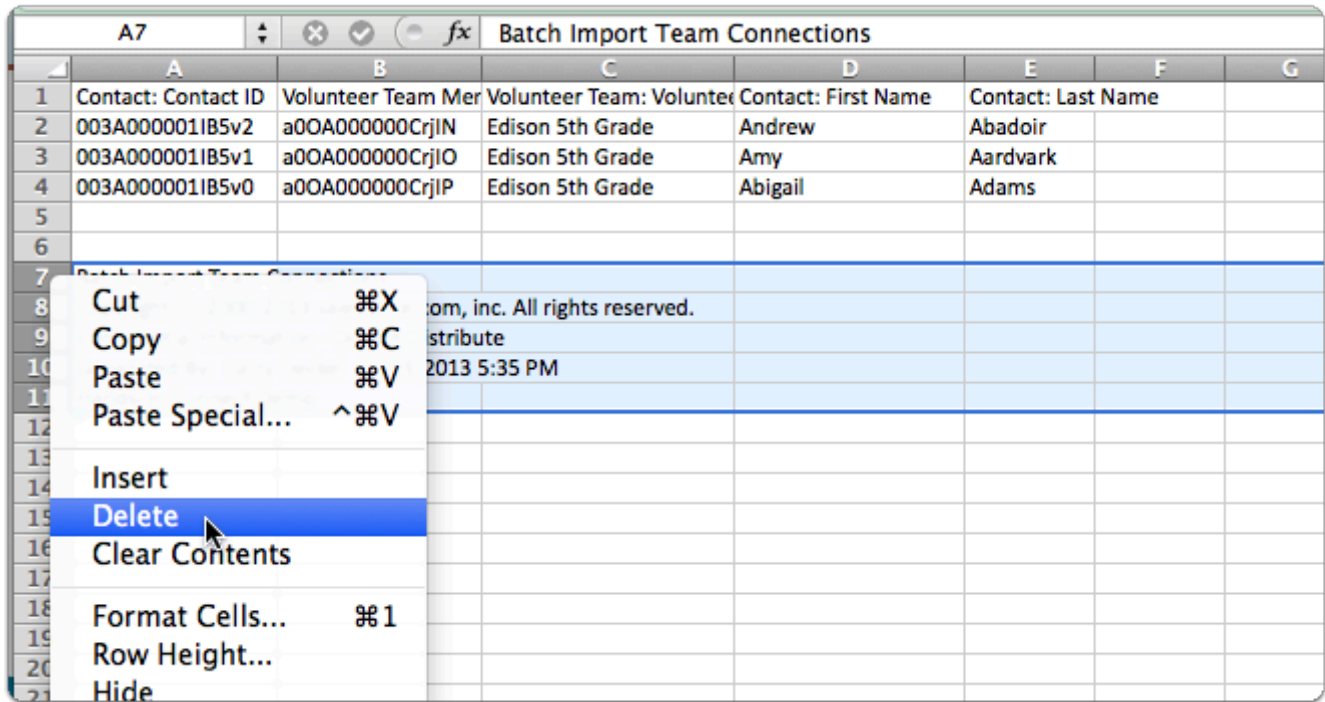
[Run Report](#) [Hide Details](#) [Customize](#) [Save](#) [Save As](#) [Delete](#) [Printable View](#) [Export Details](#) [Add to Campaign](#)

Filtered By: [Edit](#)
Volunteer Team: Volunteer Team Name equals [Edison 5th Grade](#) [Clear](#)

Contact: Contact ID	Volunteer Team: ID	Volunteer Team Member: Team Member ID	Volunteer Team: Volunteer Team Name	Contact: First Name	Contact: Last Name
003A000001IB5v2	a0PA000000A4qeJ	VTM-007513	Edison 5th Grade	Andrew	Abadoir
003A000001IB5v1	a0PA000000A4qeJ	VTM-007514	Edison 5th Grade	Amy	Aardvark
003A000001IB5v0	a0PA000000A4qeJ	VTM-007515	Edison 5th Grade	Abigail	Adams

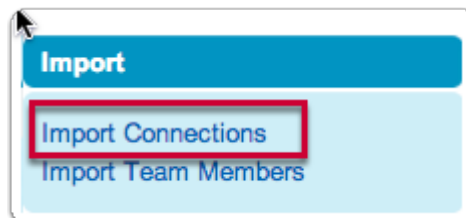
Grand Totals (3 records)

Remove the footer on the .csv file, and save.



Step 5: Import the connections

Click on the "Import Connections" link in the sidebar widget.



First

Upload the file and select the column containing the Contact ID and the Team Member ID. Click Next

Step 1
Create Connections - Select Contact File

Selected file: **report1382564117947.csv** [Change file](#)

Select column that contains Contact Salesforce ID: **Contact: Contact ID**

Select column that contains Team Member ID: **Volunteer Team Member: ID**

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

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

Then populate four fields:



- Look up the Volunteer Opportunity Name
- Look up the Occurrence (the lookup field will only show you the occurrences for this opportunity, and has enough info to make it easy to select the correct one)
- Set status to Confirmed (you can select other statuses if desired - but administratively one would typically be confirming volunteers)
- Set Attendance Status as appropriate (Typically "Please verify" for occurrences in the future. But you can mark them as "Attended" if you are bulk importing connections for a past occurrence.

Then click on the "Create Connections" button.



Step 2
Select the Volunteer Opportunity and Occurrence

[Create Connections](#) [Cancel](#)

Select Volunteer Opportunity and Related Occurrence

Volunteer Opportunity: **Clean Up the Park**  Occurrence: **OC-031757** 

Connection Details

Status: **Confirmed**  Attendance Status: **Please Verify** 

[Create Connections](#) [Cancel](#)

You did it!

You've now administratively:

- Created a contact record for each 'pending' team volunteer
- Created a volunteer team
- Created team member records for each contact
- Created team connections for each member!

If contacts already exist in the system and you can create a filtered view of the existing contacts, then you can skip Steps 1 & 2. Just create a view for the contacts you wish to add to a team and start with step 3.

Connections											
Confirmed Volunteers Waitlisted Volunteers Pending Volunteers Declined Volunteers											
Email Volunteers					Mark as Attended		Mark as Not Attended		Mark as Please Verify		
<input type="checkbox"/>	First Name	Last Name	Role	Team Name	Status	Attendance Status	Guest Vol	Date	Start Time	End Time	
<input type="checkbox"/>	Andrew	Abadoir	(V)	Edison 5th Grade	Confirmed	Please Verify	0	11/02/2013	09:30 AM	12:30 PM	
<input type="checkbox"/>	Amy	Aardvark	(V)	Edison 5th Grade	Confirmed	Please Verify	0	11/02/2013	09:30 AM	12:30 PM	
<input type="checkbox"/>	Abigail	Adams	(V)	Edison 5th Grade	Confirmed	Please Verify	0	11/02/2013	09:30 AM	12:30 PM	

(Advanced) Batch Creating Team Members

There are two ways to batch add team members:

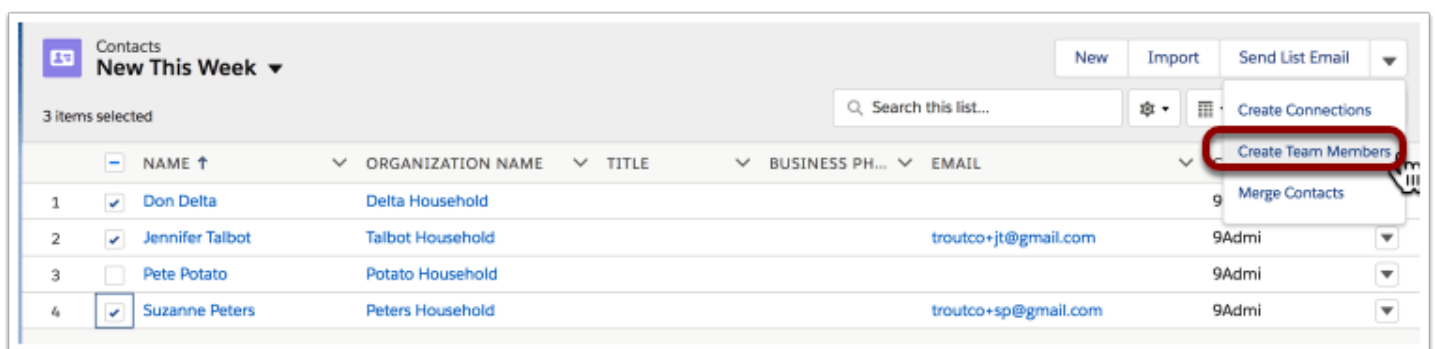
! Both of these methods require your system administrator to activate these features.

Method 1: Create Team Members from a contact list view

Go to the Contacts Tab, and select any list view (other than "Recently Viewed Contacts". You may want to create a view that gives you the contacts you want to add to a team.

In the view - put a checkbox next to each contact you want to add to an existing team.

IN the actions menu select "Create Team Members"




You'll have an option to select an existing team, by using a look-up (if you've already created the team), OR to create a new volunteer team.

Step 2
Select the Volunteer Team

[Create Volunteer Team Members](#) [Cancel](#)


Select an existing Volunteer Team to associate the imported contact with:


Volunteer Team 

OR

Create a Volunteer Team:

Volunteer Team Name

Organization 

Visibility 

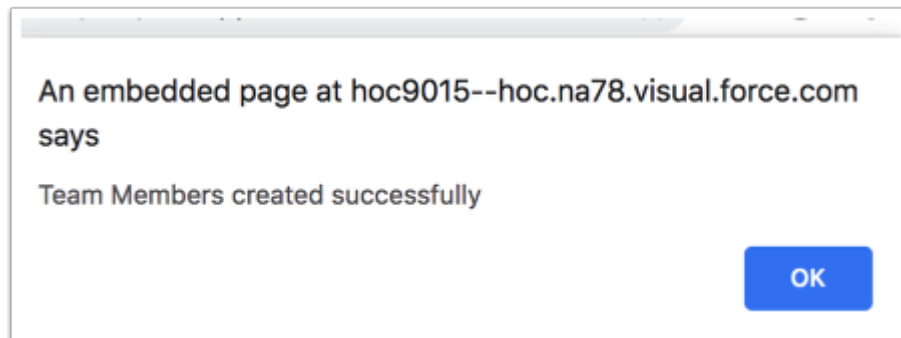
Description

[Create Volunteer Team](#)

[Create Volunteer Team Members](#) [Cancel](#)

NOTE: The field "Visibility" is no longer used in HOC 3 but IS in this form. Leave the default setting as 'private'

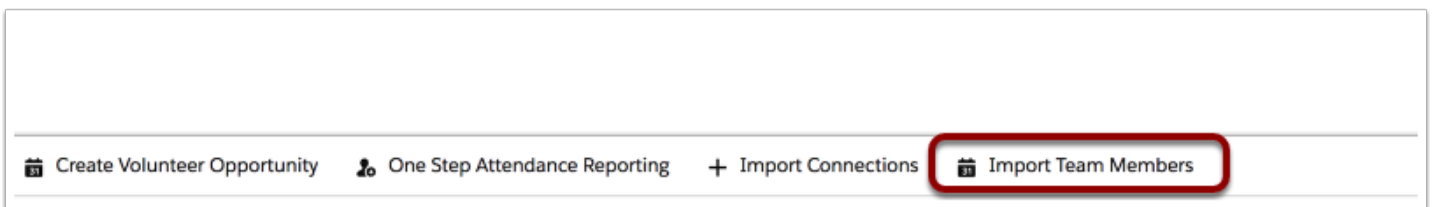
If you are creating a new volunteer team - click on "Create Volunteer Team" - then your new team will automatically be populated in the look field 'Volunteer Team' -- NOW click "Create Volunteer Team Members"



Method 2: Importing Team Members

In Classic you'll find a link to 'import team members' in the left sidebar.

In HOC Lightning - you'll find an 'import Team members' option in the utility bar:

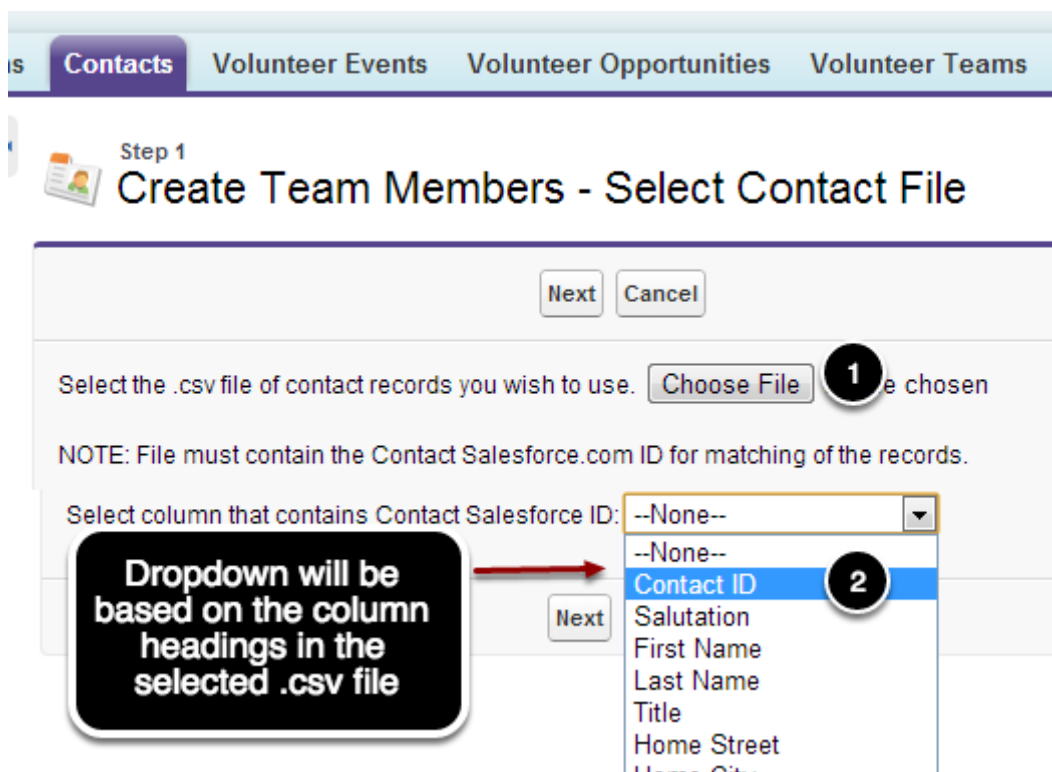


In the method - you'll need to prepare a spreadsheet of data to import. You can get the relevant info you need by running a report on the contacts you wish to import.

1. Include the Contact ID column in the report. The Contact ID is the Salesforce ID for that record and is a 15-18 digit alphanumeric number
2. Export the report as a **.CSV** file.

Importing Team Members - Step 1

This first step is the only thing different than Method 1 above. Since you are not selecting the contacts from a 'list view' -- you'll need to decide which contacts you wish to import as team members, but including a file that has the contact ID of each contact you wish to add.



Importing Team Members - Step 2

From here, the process is the same as when selecting from a list view as described above.

Step 2
Select the Volunteer Team

Select an existing Volunteer Team to associate the imported contact with:

3

Volunteer Team

OR

Create a Volunteer Team:

Volunteer Team Name

Delta Employees

Organization

Delta Airlines

Visibility

Private

▼

Description

Delta Employees at the Atlanta Headquarters.

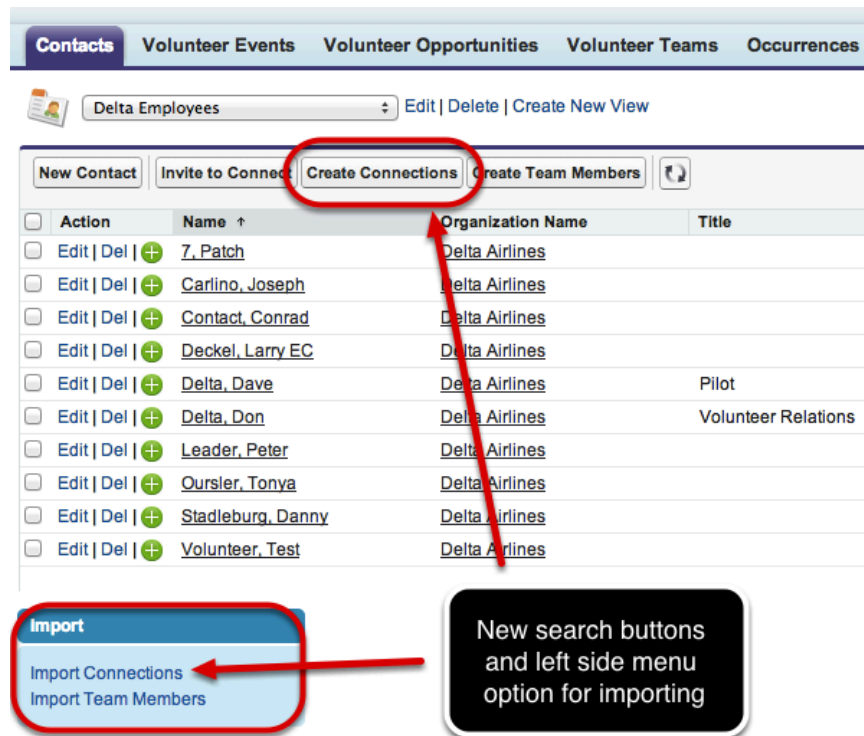
4

Create Volunteer Team Members

Use the lookup to select an existing Team or use the fields to create a new one. If you are creating a new one click on the "Create Volunteer Team" button before clicking on Create Volunteer Team Members.

Batch Creating Connections

There are two ways to create a Connection introduced in the 2.5 release. (feature must be enabled by system administrator)



1. Import Connections - Left Side Menu
2. Create Connections button - Contact List View

Both of these work by using Contact records that already exist in your instance and adding them to existing Volunteer Opportunities and Occurrences. If you first need to import the contacts into the system, [see this post on how to import contacts into salesforce.](#))

REMINDER: If you are batch adding Connections, make sure your the contacts included in your report or selected in your list view don't contain any duplicates.

Getting your Contacts - Reports

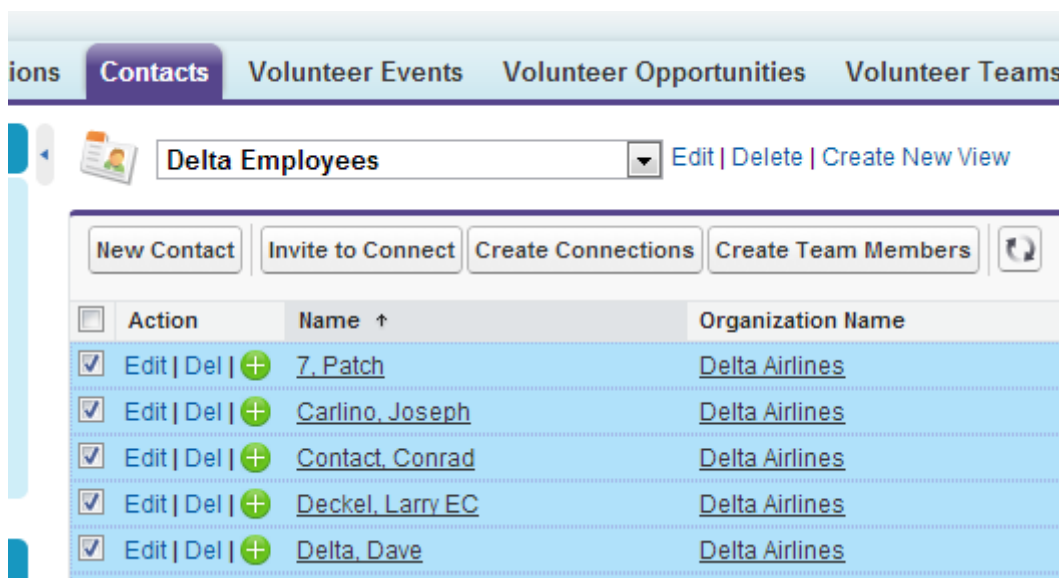
There are a number of reports that you can use to create your table for importing. If you are working on creating connections with team members, then use the "Volunteer Teams with Volunteer Team Members and Contact" report type to get both the Contact ID and Team Member ID. Reports are helpful if you are seeking contacts based on their related records, such as is a member of a Volunteer Team or has a connection to a specific volunteer opportunity.

The three most important aspects when creating a report for use in importing are:

1. Include the Contact ID column in the report. The Contact ID is the Salesforce ID for that record and is a 15-18 digit alphanumeric number. If you are also wanting to associate the Connections with a Team Member, you also need the 15-18 digit Volunteer Team Member Salesforce ID. Note: The Salesforce ID for Team Members is **not** the VTM-0000000 id.
2. Export as a **.CSV** file
3. After exporting the report, open it and remove the footer from the report. The footer is the last 5 lines that appear after the last row of data and begins with the report name.

[See this post for instructions on creating a basic report to use for this purpose.](#)

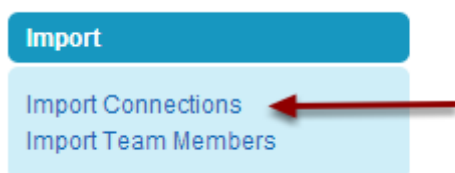
Getting your Contacts - View



You can use an existing or create a new view of contact records. Remember when creating views you are limited to filter based only on the Contact fields. This approach is helpful for locating contacts associated with a specific organization or have complete orientation, etc.

If you are using views and selecting the "Create Connections" button, you'll be able to skip the first step of the Wizard.

Importing Connections - Step 1



Step 1 Create Connections - Select Contact File

Next Cancel

Select the .csv file of contact records you wish to use. No file chosen **1**

NOTE: File must contain the Contact Salesforce.com ID for matching of the records. If you also wish to associate the contact as part of a volunteer team then include a their Team Member ID in another column

Dropdown will be based on the column headings in the selected .csv file

Contact Salesforce ID:

Team Member ID: **2**

--None--
Contact ID
Team Member ID
First Name
Last Name

Importing Connections - Step 2

Step 2 Select the Volunteer Opportunity and Occurrence

Create Connections Cancel

3 Select Volunteer Opportunity and Related Occurrence

Volunteer Opportunity Occurrence

4 Define Date and Time

Date [8/7/2013]

Start Time End Time

5 Connection Details

Status Attendance Status

6 Create Connections Cancel

3. Use the lookup to select the Volunteer Opportunity. Once the Volunteer Opportunity has been selected, then use the Occurrence lookup. The Occurrence lookup will be filtered to all the Occurrences associated with the selected Volunteer Opportunity.

4. If the Volunteer Opportunity and Occurrence are a To Be Scheduled opportunity, then the Date, Start Time and End Time fields will be presented.
5. Designate the Status and Attendance Status for the Connections you are creating. Remember if the Date & Time are in the future then use the Attendance Status = Please Verify


Once you click on "Create Connection" then go to the Occurrence and confirm that all connections were added.

Enabling Batch Create Team Members and Connections

[System Admins that wish to enable this functionality can follow the steps at this link.](#)

Batch Moving or Copying of Connections from an Occurrence

This functionality allows users to move or copy a set of connections from one occurrence to another occurrence or volunteer opportunity. Make sure you train any user that you grant this feature to so that they don't duplicate or corrupt your data.


Occurrence
OC-008134

1

Locate the occurrence with the existing connections that you wish to move or copy and click on the "Move/Copy Connections" button.

[Customize Page](#) | [Edit Layout](#) | [Printable](#)

[Show Feed](#)

[« Back to List: Occurrences](#)

[Connections \[5+\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

Occurrence Detail

[Edit](#) | [Clone](#) | [Sharing](#) | [Print Check-In Sheet](#) | [Run Answer Report](#) | [Move/Copy Connections](#) | [A](#)

▼ HandsOn Connect Shortcuts

Move or Copy Connections

[Copy Connections](#) | [Move Connections](#) | [Cancel](#)

2

Select the contacts you wish to move or copy to the new occurrence. You can use the search box or status to filter your results.

Select Volunteers

Contact Name

Confirmed ☐ Pending ☐ Waitlisted ☐ Declined ☐

<input checked="" type="checkbox"/>	Contact Name	Team Name	Connection Status	Attendance Status
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify

Select Volunteer Opportunity and Related Occurrence

Volunteer Opportunity | Disaster Response - Sanc | 3 | Occurrence | OC-008134

Define Date and Time

Start Date | 8/30/2013 10:00 AM | [8/8/2013 12:01 AM] | 4 | End Date | 8/30/2013 12:00 PM | [8/8/2013 12:01 AM]

Connection Details

Status | Confirmed | 5 | Attendance Status | Please Verify

6 | Copy Connections | Move Connections | Cancel

3. Use the lookup to select the Volunteer Opportunity. Once the Volunteer Opportunity has been selected, then use the Occurrence lookup. The Occurrence lookup will be filtered to all the Occurrences associated with the selected Volunteer Opportunity.

4. If the Volunteer Opportunity and Occurrence are a To Be Scheduled opportunity, then the Date, Start Time and End Time fields will be presented.

5. Designate the Status and Attendance Status for the Connections you are creating. Even if you are moving existing Connections you still need to select the Status and Attendance Status that they will have with the new occurrence. Remember if the Date & Time are in the future then use the Attendance Status = Please Verify

6. Click on the desired action to take:

- Move Connections - The existing connection will be updated to the new Occurrence and Volunteer Opportunity, if any. **The Notice of Occurrence Rescheduled will be sent to these contacts.**
- Copy Connections - New connections will be created for these contacts for the new Occurrence and Volunteer Opportunity, if any. **The respective Opportunity Sign-up Confirmation email alert will be sent to these contacts.**

Once you click on "Copy Connections" or "Move Connections" then go to the Occurrence and confirm that all connections were added.

Enabling Move/Copy Connections

[System Admins that wish to enable this functionality can follow the steps at this link.](#)

Adding occurrence connections to a campaign

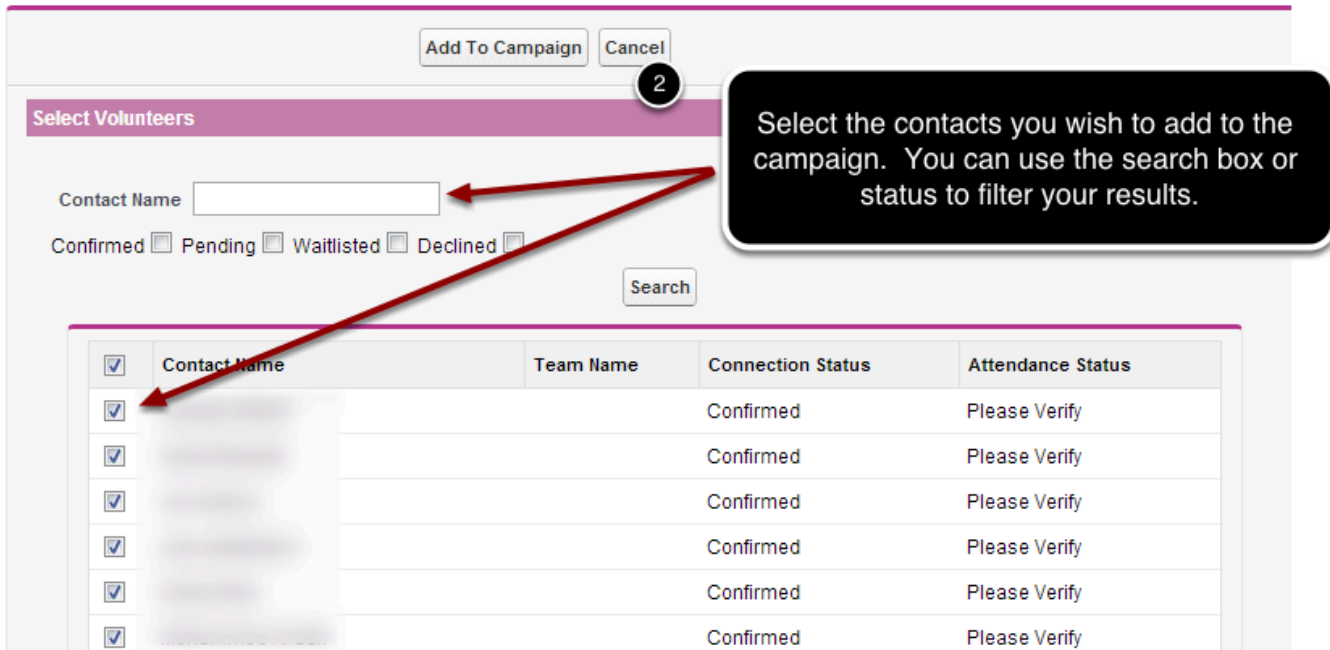
This feature is enabled to support the use of Campaigns, which is a native functionality of Salesforce.com. Campaigns can be used in a variety of ways and are often utilized with 3rd party Mass Email applications found on the Salesforce AppExchange.

While Campaigns is not part of the HandsOn Connect applications, we hope that customers that are leveraging this tool will be able to utilize the "Add to Campaign" functionality to make it easier to add contacts to your campaigns based on their involvement. We think this will be helpful in managing communications and donation efforts around volunteer events and disaster response.

To learn more about campaigns and how they could be beneficial to your organization, [click here to see documentation from Salesforce.com](#).

The screenshot displays the 'Occurrence' detail page for 'OC-008134'. At the top left is a clock icon and the text 'Occurrence OC-008134'. Below this is a 'Show Feed' button and a 'Back to List: Occurrences' link. A navigation bar contains links for 'Connections [5+]', 'Open Activities [0]', 'Activity History [0]', and 'Notes & Attachments [0]'. Below the navigation bar is a section titled 'Occurrence Detail' with buttons for 'Edit', 'Clone', 'Sharing', 'Print Check-In Sheet', 'Run Answer Report', 'Move/Copy Connections', and 'Add to Campaign'. A callout box with a red arrow points to the 'Add to Campaign' button. The callout text reads: '1 Locate the occurrence with the existing connections that you wish to add to a campaign and click on the "Add to Campaign" button.'

Add to Campaign



2

Select Volunteers

Contact Name

Confirmed ☐ Pending ☐ Waitlisted ☐ Declined ☐

<input checked="" type="checkbox"/>	Contact Name	Team Name	Connection Status	Attendance Status
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify
<input checked="" type="checkbox"/>			Confirmed	Please Verify

Select the contacts you wish to add to the campaign. You can use the search box or status to filter your results.



3

Select Campaign

Campaign Name:

New Campaign

Campaign Name

4

5

3. Use the lookup to select an existing Campaign.

4. If necessary, you can click the "Create New Campaign" button. When clicked you are given a text field to name the campaign. After you click save, the newly create campaign will be populated in the Select Campaign section. All campaigns created using this feature will have the following default values, but can be edited from the campaign record:

- Campaign Owner - user that created the campaign
- Status - In Progress
- Active - TRUE
- Type - Email

Once you click on "Add to Campaign" then go to the Campaign and confirm that all contacts were added as campaign members

Enabling Add to Campaigns

[System Admins that wish to enable this functionality can follow the steps at this link.](#)

Other Examples of updating record

Populating Impact Area (Local) for Volunteer Opportunities using the data loader

In this post we will show you the basic steps for populating the Impact Area (Local) field for Volunteer Opportunities.

For this example we are updating the Impact Area (Local) for Volunteer Opportunities with the Primary Impact Area Children & Youth Education so that we can further define the impact.

We have added the following values to our Impact Area(Local) field and need to update the Volunteer Opportunities with the correct values.

Early Childhood Education

Elementary Schools

Middle/Junior Schools

High Schools

To see a how to update picklist values, [click here](#).

While this post utilizes a specific example, you can you the steps outlined in this post to populate other local and custom fields, by building out a report that meets your needs.

Building the Data Table

The first step to populating the Impact Area (Local) for a set of Volunteer Opportunities is building the report to get us the necessary information to update the record.

For this example, we will customize the Project Overview Report located in the Project Reports folder, but you can also [create a new report](#) as well.

Go to Reports/ Project Reports/ Project Overview Report and click on the name of the report.

Once on the report preview, click Customize.

Occurrence Report (Project Coordinators)

Report Generation Status: Complete

Report Options:

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

Time From: Date Field: End Date

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

Occurrence: Occurrence	Status	Volunteer Opportunity: Opportunity Coordinator	Volunteer Opportu
------------------------	--------	--	-------------------

Once you are able to edit the report, make the following changes:

1) Add filter Primary Impact Area equals Children & Youth Education

Add filter Organization Served contains school

2) Show: All Volunteer Opportunities

3) Date Field: End Date & Time

4) Range: All Time

5) Columns to Add

Impact Area (Local)

6) Optional Remove the following columns

Partner Staff Name

Schedule Type

Status

Total Occurrences

Volunteer Event

Filters Add 1

2 how All volunteer opportunities

Date Field End Date Range All Time 4 From To

3 Primary Impact Area equals "Children & Youth Education"
AND Organization Served contains "School"

5

6

Preview Tabular Format Show Remove All Columns

Volunteer Opportunity: ID	Impact Area (Local)	Volunteer Opportunity: Volunteer Opportunity Name	Status	Description
a0NA0000003NYwH	-	Clark Elementary SUN's Holiday Craft Night	Active	<FONT co
a0NA0000003NYwN	-	Marshall SUN School Winter Craft Night	Active	Come voli
a0NA0000003NZrK	-	Referral: Winter Craft Night at Vernon SUN School	Active	Vernon St
a0NA0000003NZzM	-	SUN After School Homework Club Tutor - Marysville at Rose City Park	Active	Want to w
a0NA0000003Na5E	-	After School Tutor at Marysville SUN School	Active	Do you en
a0NA0000003NYx1	-	Hip hop dance class assistant	Active	Do you lov
a0NA0000003NaHn	-	Referral: Help w/ Harvest Festival at Marshall High School	Active	Love the f
a0NA0000003NZs5	-	Cover David Douglas School District's Library Books	Active	<p>David
a0NA0000003NYoL	-	Kindergarten Academy @ Boise Eliot	Active	Volunteer
a0NA0000003NYoR	-	Kindergarten Academy @ Sitton	Active	Volunteer
a0NA0000003NYoS	-	Kindergarten Academy @ King	Active	Volunteer

Once all the columns you need are in place, click on Run Report and then Export as .csv

Editing the Exported Table

Open the Exported table and save a copy as a back-up of the data.

Then make the necessary changes to the fields you wish to update.

Excel for Windows Tip: If you are update all the cells in a single column you can make the change in the top cell of that column and then click on that cell and drag down to highlight the remaining cells in that column. Once the cells are all highlighted, select Edit- Fill Down (keyboard shortcut: Ctrl +D).

At the bottom of the report, there is a footer, make sure to Delete these five rows from your table prior to importing the data.

Once all the changes have been made, Save the file in a location where you can find it for the import.

A	B	C	D
Volunteer Opportunity: ID	Impact Area (Local)	Volunteer Opportunity: Name	Description
a0NA0000003NZda	Elementary Schools	Kelly Early Learners	a game with a first
a0NA0000003NZdb	Elementary Schools	Markham Early Learners	a game with a first
a0NA0000003NZdc	Elementary Schools	Rigler Early Learners	a game with a first
a0NA0000003NZdd	Elementary Schools	Rosa Parks Early Learners	a game with a first
a0NA0000003NZdf	Early Childhood Education	Leap Start - Beaver Acres	program in Beaverton
a0NA0000003NZdg	Early Childhood Education	Leap Start - Bal	Beaverton
a0NA0000003NZdh	Early Childhood Education	Leap Start - Kir	Beaverton
a0NA0000003NZdi	Early Childhood Education	Leap Start - Al	Beaverton
a0NA0000003NZdl	Early Childhood Education	Leap Start - McKinley	program in Beaverton
a0NA0000003NZdm	Early Childhood Education	Leap Start - Fir Grove	program in Beaverton
a0NA0000003NYc8	High Schools	After-School Tutoring	education and volunte
a0NA0000003NZN6	High Schools	Tutor High Leapers at LEP Hig	Entrepreneurship Publ
a0NA0000003NZN9	Middle/Junior Schools	Homework Club Tutors	one of the many after-
a0NA0000003NZIG	Middle/Junior Schools	Academic Kick It Club Tutors	student's grades 6th
Project Overview Report			
Copyright (c) 2000-2011 salesforce.com, inc. All rights reserved.			
Confidential Information - Do Not Distribute			
Generated By: Art Ordoqui 4/25/2011 12:44 PM			
HandsOn Connect Demo			

Updated records

Delete

Batch Updating the Records

Now that the table has the updated information, we can proceed with the batch import to update the records.

To start go to Setup/ Admin Setup/ Data Management/ Import Custom Objects

Then click on Start Import Wizard

Personal Setup

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

App Setup

- Customize
- Create
- Develop
- Deploy
- View Installed Packages
- Critical Updates

Administration Setup

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- Data Management**
 - Analytic Snapshots
 - Import Accounts/Contacts
 - Import Leads
 - Import Solutions
 - Import Custom Objects**
 - Data Export
 - Storage Usage
 - Mass Transfer Records
 - Mass Delete Records
 - Mass Transfer Approval Requests
 - Mass Update Addresses
 - Sandbox
 - Data Loader

Custom Object Import Wizard

Use this wizard to import and/or update custom objects. You must be a salesforce.com administrator to use this wizard.

Steps to Import Custom Objects

- Before you begin, create the custom object and any custom fields on the object, including master-detail and lookup relationship fields.
- Import any records that are related to your custom object records. For example, if your custom object has a lookup relationship with accounts, import those accounts before importing your custom object.
- To create your import file, export a custom object report from salesforce.com. If your column labels match the field labels in salesforce.com, the columns will be automatically mapped for you in the import operation.
- If your custom object has owners, make sure your import file includes an owner column. Populate that column with the names of the record owners. Alternatively, populate the column with the salesforce.com IDs or external IDs of those users.
- Review your data for accuracy, and make sure that your file has 50,000 or fewer records.
- Start the Import Wizard!**

We recommend that you import a small test file of five records before importing all of your data to ensure that you have correctly prepared your import file.

The import wizard will open up in a new window.

<input type="radio"/> Recurrence		
<input type="radio"/> Registration Answer		
<input type="radio"/> Registration Question		
<input type="radio"/> Skill Rating		
<input type="radio"/> Skill		It will contain the values of skill
<input type="radio"/> Sponsor Ad		
<input type="radio"/> Sponsor Group		
<input type="radio"/> Volunteer Event		
<input checked="" type="radio"/> Volunteer Opportunity		
<input type="radio"/> Volunteer Team Member	Volunteer Team	
<input type="radio"/> Volunteer Team		
<input type="radio"/> ZipCode		
<input type="radio"/> Tool		This

Since we are updating the Impact Area (Local) information for the Volunteer Opportunity Record. Select Volunteer Opportunity from this list.

1

2

Next

Step 2. Prevent Duplicates

Step 2 of 7

Previous

Next

To prevent duplicate Volunteer Opportunity records from being created as a result of this import, choose Yes below.

Do you want to prevent duplicates from being created?

1

☐ No - insert all records in my import file.

☒ Yes - prevent duplicate records from being created. Note: You must select this option if you want to update existing records.

Which field on Volunteer Opportunity do you want to use for matching?

2

☐ Volunteer Opportunity Name

☒ Salesforce.com ID

☐ HOC ID (External ID)

☐ Import ID (External ID)

If existing records are found, what do you want to do?

3

☐ Do not update existing records and only insert new records

☒ Update existing records and do not insert any new records

☐ Update existing records and insert new records

4

Previous

Next

Since we are updating existing records, we want to select yes for Preventing Duplicates, and then select Salesforce.com ID for matching and update existing records and do not insert any new reco...

Step 3. Specify Relationships

Step 3 of 7

Previous

Next

Volunteer Opportunity records are owned by users. If there is a record owner column in your file, specify below the user field that it represents. If you do not include a record owner column in your file, you will be saved as the owner of all created records.

Which user field are you including in your file to designate record owners?

1

☒ Name

☐ Salesforce.com ID

☐ External ID

☐ None

2

Since we are not changing the Record Owner, we can mark None.

Volunteer Opportunity records have lookup relationship fields that you can set to link Volunteer Opportunities with existing records in salesforce.com.

Note: Only Volunteer Opportunity records will be created or updated as a result of this import operation.

Which lookup fields, if any, are included in your import file?

☐ Default Location

☐ Hosting Organization

☐ Managing Organization

☐ Organization Served

☐ Requires Invitation From

☐ Volunteer Event

☐ Volunteer Leader Approval Manager

Previous

Next

We do not mark any since we are not updating the relationship between the occurrence and the location, recurrence or volunteer opportunity

Step 4. File Upload
Step 4 of 7

Previous Next

1 Click Browse and find your import CSV file.

Choose File

 Summer of S... Update.csv

3

2 Specify the character encoding of your CSV file. In most cases, you can accept the default value provided.

ISO-8859-1 (General US & Western European, ISO-LATIN-1)

This is the default

3. Additional settings:

☐ Trigger workflow rules for new and updated records.

Only check if there are email alerts or other workflows, such as auto-populate fields, that you want to be sent or activat...

Step 5. Field Mapping
Step 5 of 7

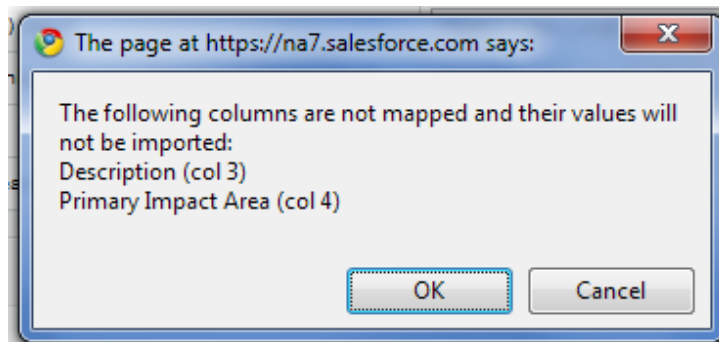
Previous Next

Column Headers from your file

Use the salesforce.com fields that correspond to the columns in your import file. Matching labels will be automatically selected.

Import Field	Salesforce.com Field
Volunteer Opportunity: ID (col 0)	<div style="border: 1px solid #ccc; padding: 2px;">Salesforce.com ID</div>
Impact Area (Local) (col 1)	<div style="border: 1px solid #ccc; padding: 2px;">Impact Area (Local)</div>
Volunteer Opportunity: Volunteer Opportunity Name (col 2)	<div style="border: 1px solid #ccc; padding: 2px;">Volunteer Opportunity Name</div>
	<div style="border: 1px solid #ccc; padding: 2px;">--None--</div>
	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #e6f2ff; padding: 2px;">--None--</div> <div style="background-color: #e6f2ff; padding: 2px;">--None--</div> <div style="padding: 2px;">Activity Type</div> <div style="padding: 2px;">Age Groups Served</div> <div style="padding: 2px;">Background Check Required</div> <div style="padding: 2px;">City</div> <div style="padding: 2px;">Country</div> <div style="padding: 2px;">Court Ordered Allowed</div> <div style="padding: 2px;">Description</div> <div style="padding: 2px;">End Date</div> <div style="padding: 2px;">End Date Time</div> <div style="padding: 2px;">Genders Served</div> </div>

The field in HandsOn Connect that you want to update. Some automatch based on the column headers, but you can also select the desired field fr...



After you click next, if there were any fields in your table that weren't mapped, you receive a confirmation that you don't want to map them before proceeding. Since these were optional fields to help us determine the value for Impact Area (Local) they don't need to be mapped. If there are no other fields missed then click OK.

Step 6. Verify Import Settings Step 6 of 7

Previous **Import Now!**

Click **Import Now!** to submit this import request to salesforce.com.

Previous Import Now!

Step 7. Import Initiated Step 7 of 7

click finish to close the Wizard

Finish

Salesforce.com will now begin to import your file. You will be notified by email at sordoqui@handsonnetwork.org when your import is completed. Based on the current volume of import activity, we estimate that your import will be completed in approximately 1 minute. You can check on the status of your import by viewing the [Import Queue](#).

You can also access the Import Queue from Setup/ Admin Setup/ Monitoring...

Finish

Once the Import has completed, make sure to go back to the Occurrences and check to make sure that they were updated properly.

Email Confirmation

Salesforce.com import of file Summer of Service- Opportunity Coord Update.csv has finished, processed 43 lines.

support@salesforce.com

You forwarded this message on 4/20/2011 9:35 AM.

Sent: Tue 4/19/2011 8:23 PM

To: Art Ordoqui

Alert: Salesforce.com has just completed your import process!

Result:

Number of Occurrences created: 0

Number of Occurrences updated: 8

Number of locked Occurrence IDs: 0

We strongly recommend that you check a few of your imported records to verify that your information was imported as expected.

If you encounter any problems or have any questions, please contact us by clicking Help & Training at the top right of any

Updating Volunteer Opportunity and Occurrence Status

In this post we will show you the basic steps for updating the Status for a Record.

For this example, Art in Texas is not longer an active partner so we need to make all their Volunteer Opportunities and Occurrences Inactive.

NOTE: Making an Occurrence Inactive does not remove the related connections or notify the volunteers that the opportunity has been cancelled. You need to still email the volunteers to notify them of the cancellation and it is recommended that you change the connection status to Declined to prevent reminder and post-opportunity emails from being sent and so the opportunity gets removed from their Upcoming Opportunities list for the contact.

New workflows recently introduced in the system MAY do this for you -- so check to see if the connections still need updating.

While this post utilizes a specific example, you can you the steps outlined in this post to update other objects and fields, by building out a report that meets your needs.

Building the Data Table

The first step to batch updating the status for a set of volunteer opportunities and occurrences, is building the report to get us the necessary information to update the record.

For this example, we will create a new Report

Go to Reports and click on the Create New Custom Report button

Create New Report

[Help for this Page ?](#)

Select Report Type

The screenshot shows the 'Create New Report' process. On the left, a 'Select Category' list includes 'Organizations & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', 'Campaigns', 'Activities', 'Contract Reports', 'Price Books, Products and Assets', 'Administrative Reports', and 'Other Reports' (1). An arrow points from 'Other Reports' to a 'Select Report Type' list on the right. This list includes 'Associations with Organization', 'Locations', 'Locations with Organization', 'Locations with Zip/Postal Code', 'Occurrences', 'Occurrences with Location', 'Occurrences with Recurrence', 'Occurrences with Volunteer Opportunity' (2), 'Occurrences with Connections and Volunteer Opportunities', 'Questions', 'Questions with Volunteer Opportunity', and 'Recurrences'. To the right of the 'Select Report Type' list is a 'Preview' section that says 'No preview available.' At the bottom right of the 'Select Report Type' list are 'Cancel' and 'Create' buttons (3).

Once you are able to edit the report, make the following changes:

- 1) Add filter Volunteer Opportunity: Organization Served Name equals Art in Texas
- 2) Show: All Occurrences
- 3) Date Field: End Date & Time
- 4) Range: All Time
- 5) Columns to Add

Volunteer Opportunity: Record ID

Occurrence ID (Salesforce.com ID field)

Status (since we are updating both the Volunteer Opportunity and the Occurrences to the same status you only

need to select one of the status fields to bring into the report)

6) Since it can be challenging to decipher the Salesforce.com IDs, you can add additional columns such as Volunteer Opportunity Name to help you in managing the data. If you need to filter or sort the data, you can also include the Occurrence: Occurrence ID field (OC-#####).

Filters Add 1

2 Show All occurrences

Date Field End Date & Time Range All Time From To

3 Volunteer Opportunity: Organization Served Name starts with "Art in Texas"

6 Volunteer Opportunity: Organization Served Name

5 Volunteer Opportunity: Record ID

Preview Tabular Format Show Remove All Columns

Volunteer Opportunity: Volunteer Opportunity Name	Volunteer Opportunity: Record ID	Status	Occurrence: ID	Occurrence: Occur
Help in the Classroom	a0NA0000000KYQY	Active	a0CA0000004Gos1	OC-000100
Art in Texas	a0NA0000000Ofhw	Active	a0CA0000003Ww...	OC-000069
Art in Texas	a0NA0000000Ofhw	Active	a0CA00000050rOu	OC-000161
Art in Texas	a0NA0000000Ofhw	Active	a0CA0000005Opsj	OC-023290
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRk1	OC-023291
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRk2	OC-023292
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRk3	OC-023293
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRk4	OC-023294
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRk5	OC-023295
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRk6	OC-023296
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRk7	OC-023297
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRk8	OC-023298
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRk9	OC-023299
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRkA	OC-023300
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRkB	OC-023301
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRkC	OC-023302
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRkD	OC-023303
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRkE	OC-023304
Art Mentors	a0NA0000000IUMX	Active	a0CA0000005PRkF	OC-023305

Once all the columns you need are in place, click on Run Report and then Export as .csv

Editing the Exported Table

Open the Exported table and save a copy as a back-up of the data.

Then make the necessary changes to the fields you wish to update.

Excel for Windows Tip: If you are update all the cells in a single column you can make the change in the top cell of that column and then click on that cell and drag down to highlight the remaining cells in that column. Once the cells are all highlighted, select Edit- Fill Down (keyboard shortcut: Ctrl +D).

At the bottom of the report, there is a footer, make sure to Delete these five rows from your table prior to importing the data.

Once all the changes have been made, Save the file in a location where you can find it for the import.

	A	B	C	D	E
	Volunteer Opportunity:	Volunteer Opportunity:			Occurrence:
1	Volunteer Opportunity Name	Record ID	Status	Occurrence: ID	Occurrence ID
205	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA00000094N8N	OC-023746
206	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA0000009w5fe	OC-023805
207	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA0000009w5g8	OC-023806
208	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA0000009LaFr	OC-023747
209	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA0000009MDa2	OC-023750
210	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA0000009abhZ	OC-023753
211	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA0000009wVeU	OC-023811
212	MLK Day- Project 1	a0NA0000006PCCD	Active	a0CA0000009waTA	OC-023817
213	Nature Guides	a0NA0000006Pvmk	Active	a0CA0000009waXJ	OC-023816
214	Come Clean My House	a0NA0000006QCsb	Active	a0CA0000009waZk	OC-023818
215	This is a big test	a0NA0000007DuvP	Active	a0CA0000009waYX	OC-023819
216	Another Test	a0NA0000007DxBV	Active	a0CA0000009wakd	OC-023822
217	Ongoing Partner Managed Opp	a0NA0000007DxCI	Active		
218	One Last Time	a0NA0000007DxDI	Active		
219	Ongoing Vol Opp 2	a0NA0000007DxE9	Active		
220	Partner is Managing this one	a0NA0000007DxFR	Active		
221					
222					
223	Occurrence with Volunteer Opportunity Report				
224	Copyright (c) 2000-2011 salesforce.com, inc. All rights reserved.				
225	Confidential Information - Do Not Distribute				
226	Generated By: Staff Training Profile 4/19/2011 11:03 PM				
227	HandsOn Connect Demo				

Updated records

Delete

Batch Updating the Records

Now that the table has the updated information, we can proceed with the batch import to update the records.

We can only update one record at a time so we will start with the Occurrences.

To start go to Setup/ Admin Setup/ Data Management/ Import Custom Objects

Then click on Start Import Wizard

Personal Setup

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

App Setup

- Customize
- Create
- Develop
- Deploy
 - View Installed Packages
 - Critical Updates

Administration Setup

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- Data Management**
 - Analytic Snapshots
 - Import Accounts/Contacts
 - Import Leads
 - Import Solutions
 - Import Custom Objects**
 - Data Export
 - Storage Usage
 - Mass Transfer Records
 - Mass Delete Records
 - Mass Transfer Approval Requests
 - Mass Update Addresses
 - Sandbox
 - Data Loader

Custom Object Import Wizard

Use this wizard to import and/or update custom objects. You must be a salesforce.com administrator to use this wizard.

Steps to Import Custom Objects

- Before you begin, create the custom object and any custom fields on the object, including master-detail and lookup relationship fields.
- Import any records that are related to your custom object records. For example, if your custom object has a lookup relationship with accounts, import those accounts before importing your custom object.
- To create your import file, export a custom object report from salesforce.com. If your column labels match the field labels in salesforce.com, the columns will be automatically mapped for you in the import operation.
- If your custom object has owners, make sure your import file includes an owner column. Populate that column with the names of the record owners. Alternatively, populate the column with the salesforce.com IDs or external IDs of those users.
- Review your data for accuracy, and make sure that your file has 50,000 or fewer records.
- Start the Import Wizard!**

We recommend that you import a small test file of five records before importing all of your data to ensure that you have correctly prepared your import file.

The import wizard will open up in a new window.

Step 1. Choose Record
Step 1 of 7

2
Next

Welcome to the custom object import wizard.

From the list below, choose the type of record that you are importing.

Label	Master Object	Description
<input type="radio"/> Ad Group		A Google Ad Group is a collection of Text Ads and Keywords
<input type="radio"/> Google Campaign		Google AdWords Campaigns are high-level marketing initiatives
<input type="radio"/> Keyword		Keywords are the terms purchased in Google AdWords
<input type="radio"/> Search Phrase		Search Phrases are the search terms or phrases the user types into a search box
<input type="radio"/> Text Ad		Text Ads are the advertising copy that displays on the search results page
<input type="radio"/> SFGA Version		This object is for administrative purposes only and records the current version of the object. Do not edit this
<input type="radio"/> Answer		
<input type="radio"/> Association		
<input type="radio"/> Location		
<input checked="" type="radio"/> Occurrence		
<input type="radio"/> Question		

Since we are updating the Status for the Occurrence Record. Select Occurrence from this li...

Step 2. Prevent Duplicates

Step 2 of 7

Previous

Next

To prevent duplicate Occurrence records from being created as a result of this import, choose Yes below.

Do you want to prevent duplicates from being created?

1

☐ No - insert all records in my import file.
 ☒ Yes - prevent duplicate records from being created. Note: You must select this option if you want to update existing records.

Which field on Occurrence do you want to use for matching?

2

☐ Occurrence ID
 ☒ Salesforce.com ID
 ☐ HOC ID (External ID)
 ☐ Import ID (External ID)

If existing records are found, what do you want to do?

3

☐ Do not update existing records and only insert new records
 ☒ Update existing records and do not insert any new records
 ☐ Update existing records and insert new records

4

Previous

Next

Since we are updating existing records, we want to select yes for Preventing Duplicates, and then select Salesforce.com ID for matching and update existing records and do not insert any new reco...

Step 3. Specify Relationships

Step 3 of 7

2

Previous

Next

Occurrence records are owned by users. If there is a record owner column in your file, specify below the user field that it represents. If you do not include a record owner column in your file, you will be saved as the owner of all created records.

Which user field are you including in your file to designate record owners?

1

☐ Name
 ☐ Salesforce.com ID
 ☐ External ID
 ☒ None

Occurrence records have lookup relationship fields that you can set to link Occurrences with existing records in salesforce.com.

Note: Only Occurrence records will be created or updated as a result of this import operation.

Which lookup fields, if any, are included in your import file?

☐ Location
 ☐ Recurrence
 ☐ Volunteer Opportunity

Since we are not changing the Record Owner, we can mark None.

We do not mark any since we are not updating the relationship between the occurrence and the location, recurrence or volunteer opportunity

Step 4. File Upload
Step 4 of 7

Previous Next

1 Click Browse and find your import CSV file.

Choose File
Summer of S... Update.csv

3

2 Specify the character encoding of your CSV file. In most cases, you can accept the default value provided.

ISO-8859-1 (General US & Western European, ISO-LATIN-1)

This is the default

3. Additional settings:

☐
Trigger workflow rules for new and updated records.

Only check if there are email alerts or other workflows, such as auto-populate fields, that you want to be sent ...

Step 5. Field Mapping
Step 5 of 7

Previous Next

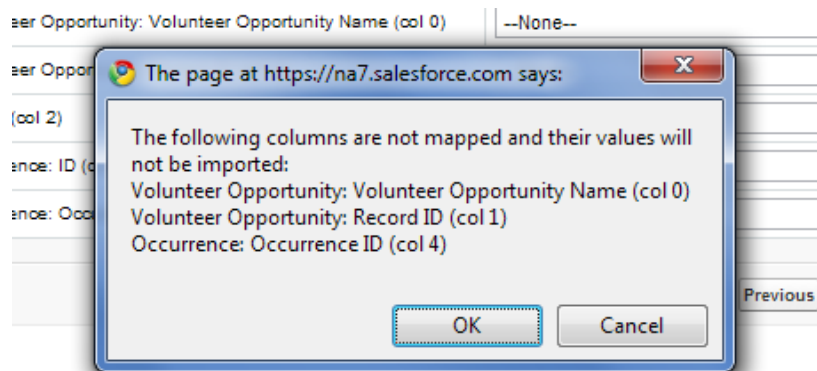
Column Headers from your file

Use the salesforce.com fields that correspond to the columns in your file. Matching labels will be automatically selected.

Import Field	Salesforce.com Field
Volunteer Opportunity: Volunteer Opportunity Name (col 0)	--None--
Volunteer Opportunity: Record ID (col 1)	--None--
Status (col 2)	Status
Occurrence: ID (col 3)	<div style="border: 1px solid #ccc; padding: 2px;"> Salesforce.com ID </div> <div style="font-size: 0.8em; margin-top: 5px;"> End Date & Time Google Map URL Guest Volunteer Hours Served Guest Volunteers Attended HOC Domain Name HOC ID Import ID IsUpdateable Managing Organization Name Maximum Attendance Minimum Attendance Occurrence URL Opportunity Approval Manager Email </div>

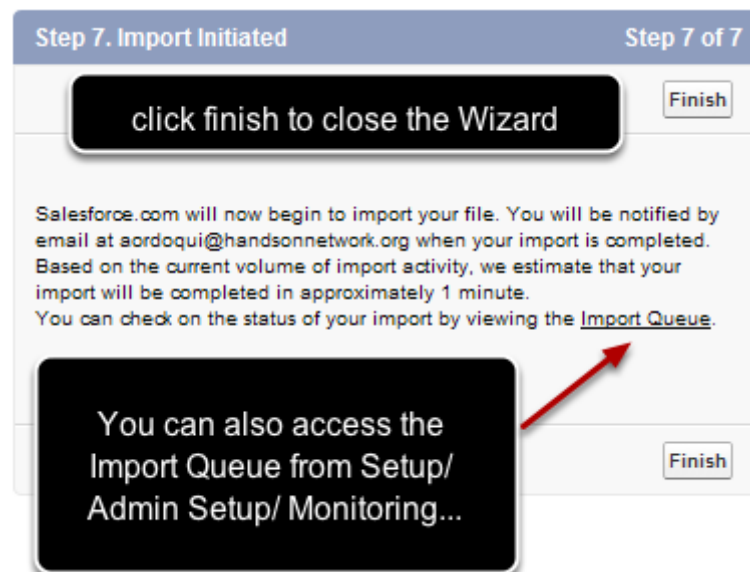
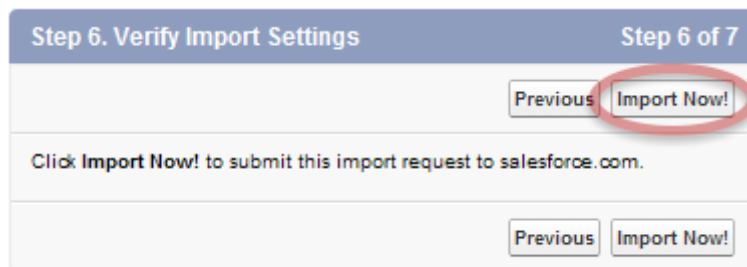
The field in HandsOn Connect that you want to update. Some automatch based on the column headers, but you can also select the desired field fr...

Note: Select Salesforce.com ID for the ID associated with the primary record you are updating. In this case Occurrence: ID is the column that gets mapped to the Salesforce.com ID.



After you click next, if there were any fields in your table that weren't mapped, you receive a confirmation that you don't want to map them before proceeding. Since we are not updating the Volunteer Opportunity at this time we can leave those fields unmapped.

If you meant to not map the field(s) then click OK.



Once the Import has completed, make sure to go back to the Occurrences and check to make sure that they were updated properly.

Email Notification

Salesforce.com import of file Summer of Service- Opportunity Coord Update.csv has finished, processed 43 lines.

support@salesforce.com

Sent: Tue 4/19/2011 8:23 PM

To: Art Ordoqui

Alert: Salesforce.com has just completed your import process!

Result:

Number of Occurrences created: 0

Number of Occurrences updated: 8

Number of locked Occurrence IDs: 0

We strongly recommend that you check a few of your imported records to verify that your information was imported as expected.

If you encounter any problems or have any questions, please contact us by clicking Help & Training at the

Updating Opportunity Coordinator

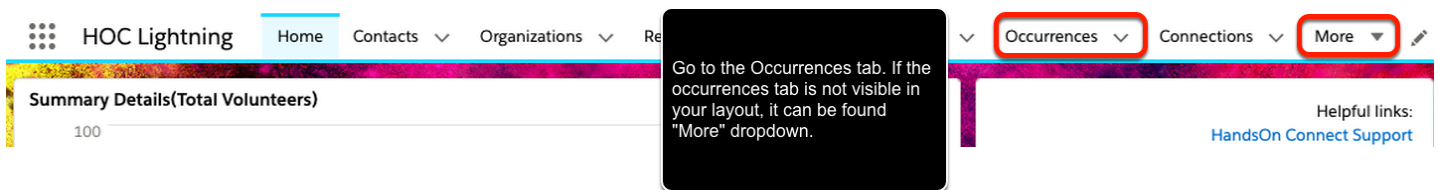
In this post we will show you the basic steps for updating the Opportunity Coordinator for Occurrences.

For general information on how to apply the steps in this post to other fields in the occurrence or other records, please view [this post](#).

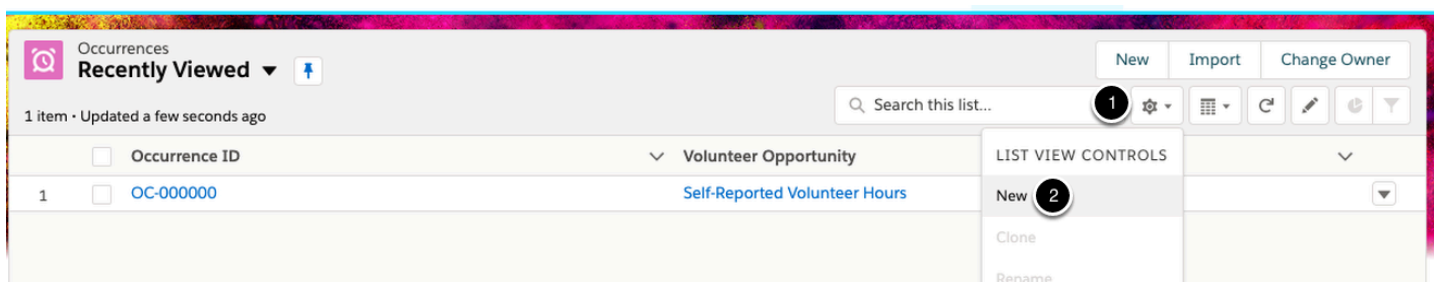
For this example we are updating the Opportunity Coordinator for the Occurrences associated with the Volunteer at the Fisherman's Festival opportunity. The Opportunity Coordinator is currently H.R. Wells and it needs to be updated to Charles Xavier.

While this post utilizes a specific example, you can use the steps outlined in this post to update other objects, but building out a view that meets your needs.

Creating the View



Once in the Occurrences object. Click on "New"



In creating the new view, you first create the list view and then continue with the filtering to restrict the records shown in the list view. Once those two steps have been completed, you identify which columns you wish to have in your view.

In this example we are wanting to update all the upcoming occurrences associated with Fisherman's Festival.

Occurrences
Recently Viewed

1 item • Updated 2 minutes ago

Occurrence ID

1 OC-000000

New List View

* List Name
Updating Opportunity Coordinator

* List API Name
Updating_Oppportunity_Coordinator

Who sees this list view?

☒ Only I can see this list view

☐ All users can see this list view

☐ Share list view with groups of users

Cancel Save

Filters 1

Filter by Owner
All occurrences

Matching all of these filters

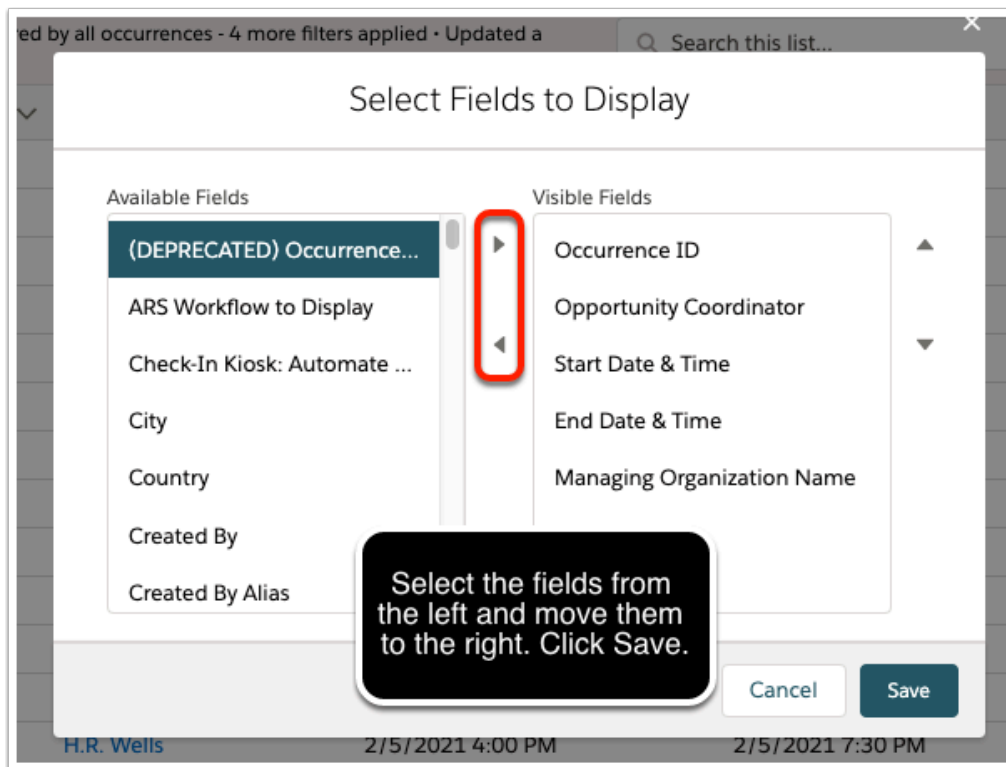
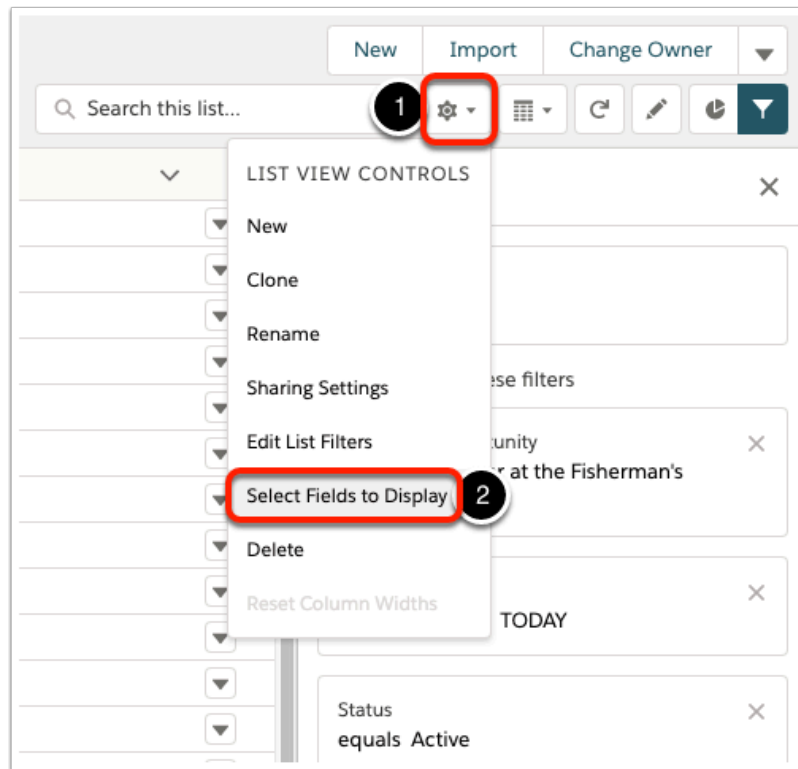
Volunteer Opportunity
equals Volunteer at the Fisherman's
Festival

Start Date & Time
greater or equal TODAY

Status
equals Active

Add Filter 2
Add Filter Logic
Remove All

Be sure to click Save when modifying any filters for your list view.



Changing the Opportunity Coordinator

Occurrences
Updating Opportunity Coordinator ▼

23 items selected

	<input checked="" type="checkbox"/>	Occurrence ID ↑	Opportunity Coordin...	Start Date & Time
1	<input checked="" type="checkbox"/>	OC-002663	H.R. Wells	2/7/2020 4:00 PM
2	<input checked="" type="checkbox"/>	OC-002664	H.R. Wells	3/6/2020 4:00 PM
3	<input checked="" type="checkbox"/>	OC-002665	H.R. Wells	
4	<input checked="" type="checkbox"/>		H.R. Wells	
5	<input checked="" type="checkbox"/>		H.R. Wells	
6	<input checked="" type="checkbox"/>		H.R. Wells	
7	<input checked="" type="checkbox"/>	OC-002669	H.R. Wells	
8	<input checked="" type="checkbox"/>	OC-002670	H.R. Wells	
9	<input checked="" type="checkbox"/>	OC-002671	H.R. Wells	

Mark the check box at the top to Select All

Once you have selected all the records, then scroll over to the Opportunity Coordinator field, when the pencil appears single click to open the edit screen.

Click the "X" to remove the current coordinator and type in the search box to find your new coordinator. Make your selection and then be sure to check the box for "Update xx selected items" and then click apply.

▼ Opportunity Coordin... ▼ Start Date & Time

☒ H.R. Wells X

☒ Update 23 selected items

Cancel Apply

H.R. Wells 7/3/2020 4:00 PM

charles xavier

Q "charles xavier" in Contacts

Charles Xavier Cancel

+ New Contact

Charles Xavier X

☒ Update 23 selected items

Cancel Apply

When the window first reloads, the Opportunity Coordinator Email will be revised on the screen and highlighted in yellow, but this change must be saved. Click Save at the bottom.


Occurrences
Updating Opportunity Coordinator

23 items selected


Search this list...

	Occurrence ID ↑	Opportunity Coordin...	Start Date & Time	End Date & Time	Managing Orga
1	<input checked="" type="checkbox"/> OC-002663	Charles Xavier	2/7/2020 4:00 PM	2/7/2020 7:30 PM	STAR Labs
2	<input checked="" type="checkbox"/> OC-002664	Charles Xavier	3/6/2020 4:00 PM	3/6/2020 7:30 PM	STAR Labs
3	<input checked="" type="checkbox"/> OC-002665	Charles Xavier	4/3/2020 4:00 PM	4/3/2020 7:30 PM	STAR Labs
4	<input checked="" type="checkbox"/> OC-002666	Charles Xavier	5/1/2020 4:00 PM	5/1/2020 7:30 PM	STAR Labs
5	<input checked="" type="checkbox"/> OC-002667	Charles Xavier	6/5/2020 4:00 PM	6/5/2020 7:30 PM	STAR Labs
6	<input checked="" type="checkbox"/> OC-002668	Charles Xavier	7/3/2020 4:00 PM	7/3/2020 7:30 PM	STAR Labs
7	<input checked="" type="checkbox"/> OC-002669	Charles Xavier	8/7/2020 4:00 PM	8/7/2020 7:30 PM	STAR Labs
8	<input checked="" type="checkbox"/> OC-002670	Charles Xavier	9/4/2020 4:00 PM	9/4/2020 7:30 PM	STAR Labs
9	<input checked="" type="checkbox"/> OC-002671	Charles Xavier	10/2/2020 4:00 PM	10/2/2020 7:30 PM	STAR Labs
10	<input checked="" type="checkbox"/> OC-002672	Charles Xavier	11/6/2020 4:00 PM	11/6/2020 7:30 PM	STAR Labs
11	<input checked="" type="checkbox"/> OC-002673	Charles Xavier	12/4/2020 4:00 PM	12/4/2020 7:30 PM	STAR Labs
12	<input checked="" type="checkbox"/> OC-002674	Charles Xavier	1/1/2021 4:00 PM	1/1/2021 7:30 PM	STAR Labs
13	<input checked="" type="checkbox"/> OC-002675	Charles Xavier	2/5/2021 4:00 PM	2/5/2021 7:30 PM	STAR Labs
14	<input checked="" type="checkbox"/> OC-002676	Charles Xavier	3/5/2021 4:00 PM	3/5/2021 7:30 PM	STAR Labs
15	<input checked="" type="checkbox"/> OC-002677	Charles Xavier	4/2/2021 4:00 PM	4/2/2021 7:30 PM	STAR Labs

Cancel Save









Occurrences
Updating Opportunity Coord

 Your changes are saved.

New
Import
Change Owner

23 items selected

Search this list...

	<input checked="" type="checkbox"/>	Occurrence ID ↑	Opportunity Coordin...	Start Date & Time	End Date & Time	Managing Organi...
1	<input checked="" type="checkbox"/>	OC-002663	Charles Xavier	2/7/2020 4:00 PM	2/7/2020 7:30 PM	STAR Labs
2	<input checked="" type="checkbox"/>	OC-002664	Charles Xavier	3/6/2020 4:00 PM	3/6/2020 7:30 PM	STAR Labs
3	<input checked="" type="checkbox"/>	OC-002665	Charles Xavier	4/3/2020 4:00 PM	4/3/2020 7:30 PM	STAR Labs
4	<input checked="" type="checkbox"/>	OC-002666	Charles Xavier	5/1/2020 4:00 PM	5/1/2020 7:30 PM	STAR Labs
5	<input checked="" type="checkbox"/>	OC-002667	Charles Xavier	6/5/2020 4:00 PM	6/5/2020 7:30 PM	STAR Labs
6	<input checked="" type="checkbox"/>	OC-002668	Charles Xavier	7/3/2020 4:00 PM	7/3/2020 7:30 PM	STAR Labs
7	<input checked="" type="checkbox"/>	OC-002669	Charles Xavier	8/7/2020 4:00 PM	8/7/2020 7:30 PM	STAR Labs
8	<input checked="" type="checkbox"/>	OC-002670	Charles Xavier	9/4/2020 4:00 PM	9/4/2020 7:30 PM	STAR Labs
9	<input checked="" type="checkbox"/>	OC-002671	Charles Xavier	10/2/2020 4:00 PM	10/2/2020 7:30 PM	STAR Labs
10	<input checked="" type="checkbox"/>	OC-002672	Charles Xavier	11/6/2020 4:00 PM	11/6/2020 7:30 PM	STAR Labs
11	<input checked="" type="checkbox"/>	OC-002673	Charles Xavier	12/4/2020 4:00 PM	12/4/2020 7:30 PM	STAR Labs

(Advanced) Using the Apex Data Loader

Getting Started with the Apex Data Loader

The Apex Data Loader can be used by System Admins as a desktop tool to help manage data with imports, updates, exports, and delete.

It offers features not found in the import wizards that are native salesforce.

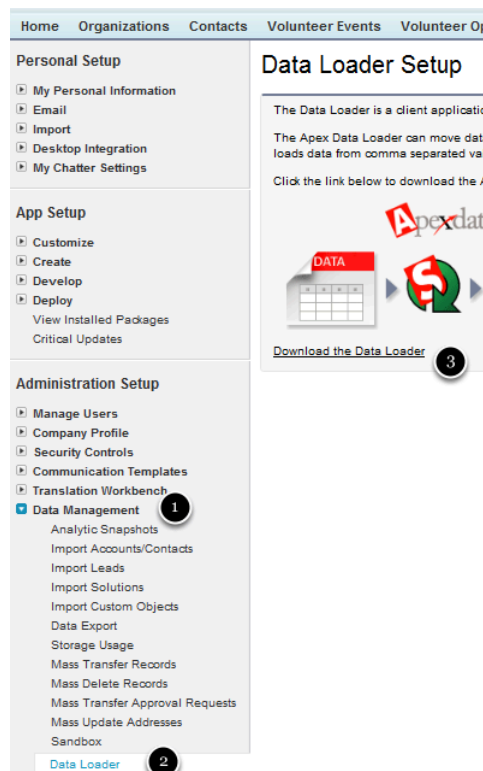
With the data loader you can:

- Update records which have multiple parent organizations (i.e. Connections)
- Insert new records and update existing records at the same time (upsert)
- Insert null values into existing fields that already have data in them
- Access to the fields Opportunity Approval Manager and VL Approval Manager (which are not available through the import wizards)
- and much more

Serious data management gurus will find the data loader their tool of choice for managing data.

NOTE: The Apex Data Loader requires windows. Mac users will find a similar tool called LexiLoader which is developed by an outside developer and not directly offered through Salesforce. It can be found here: <http://www.pocketsoap.com/osx/lexiloader/>

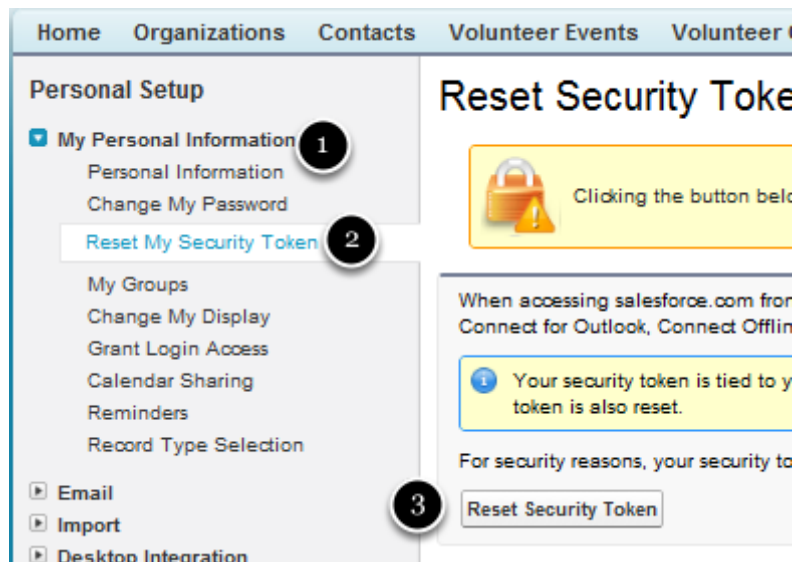
Downloading the Apex Data Loader



After clicking "Download the Data Loader" save the ApexDataLoader.exe file to your system. Once the file has been saved, run the ApexDataLoader.exe file and follow the Install Wizard steps.

Security Token

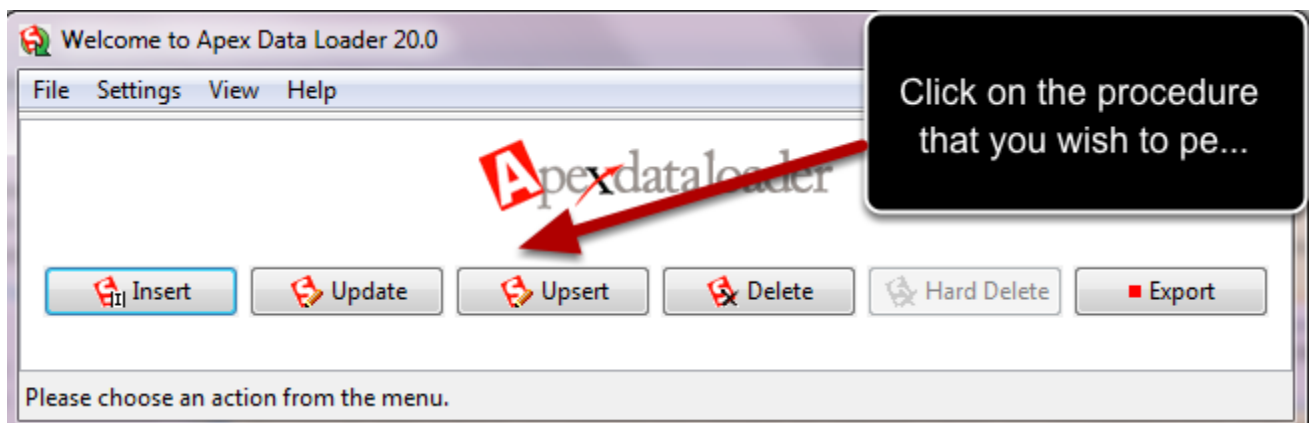
In order for you to use the Apex Data Loader you will need to have the unique security token associated with your UserID. If you are going to be using the data loader often, then maintain the security token in a secure location to avoid having to reset it often.



The Security Token is sent to the email address associated with your user account.

Note: If you reset your password, then your security token is also reset and you will need to request a new one.

Logging In to the Apex Data Loader



Note "Upsert" is a combination of Insert and Update. This task updates existing records and inserts new ones based on the data being imported.



Step 1: Salesforce Settings

Enter your Salesforce username and password.

A screenshot of a login form. It has a light grey background. At the top, it says 'Username:' followed by a text input field containing 'aordoqui@handsonconnect.i'. Below that, it says 'Password:' followed by a password input field filled with black dots. At the bottom right, there is a 'Log in' button.

The username is the email address associated with your user account.

The password is your usual password with the Security Token following immediately without any spaces.

"passwordsecuritytoken"

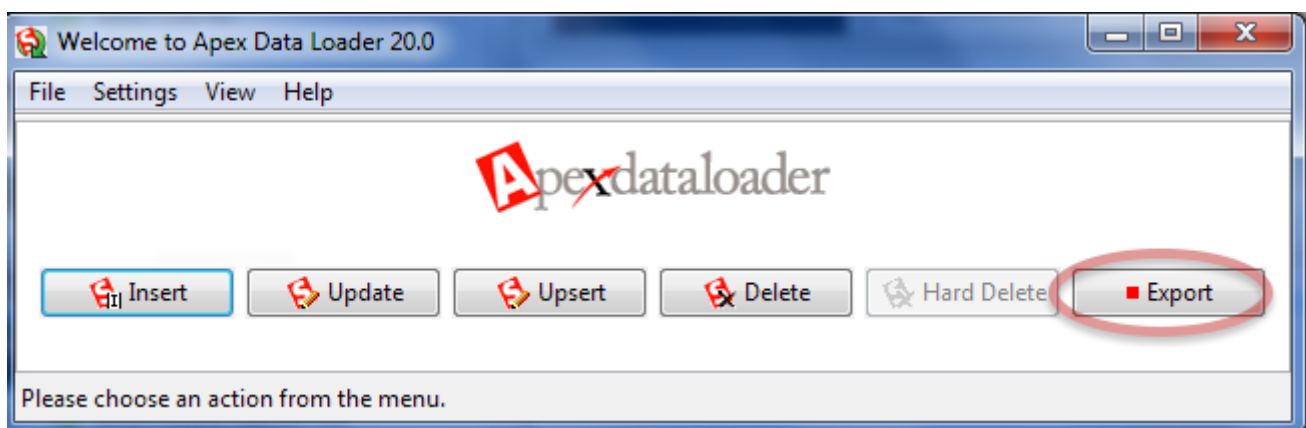
Exporting Records using the Apex Data Loader

The Apex Data Loader can be used as an alternative to running reports in HandsOn Connect, especially for items such as Notes that can't easily be accessed through the reports.

This method should be used primarily for exporting records to update as you can not save the filters, etc.

Apex Data Loader

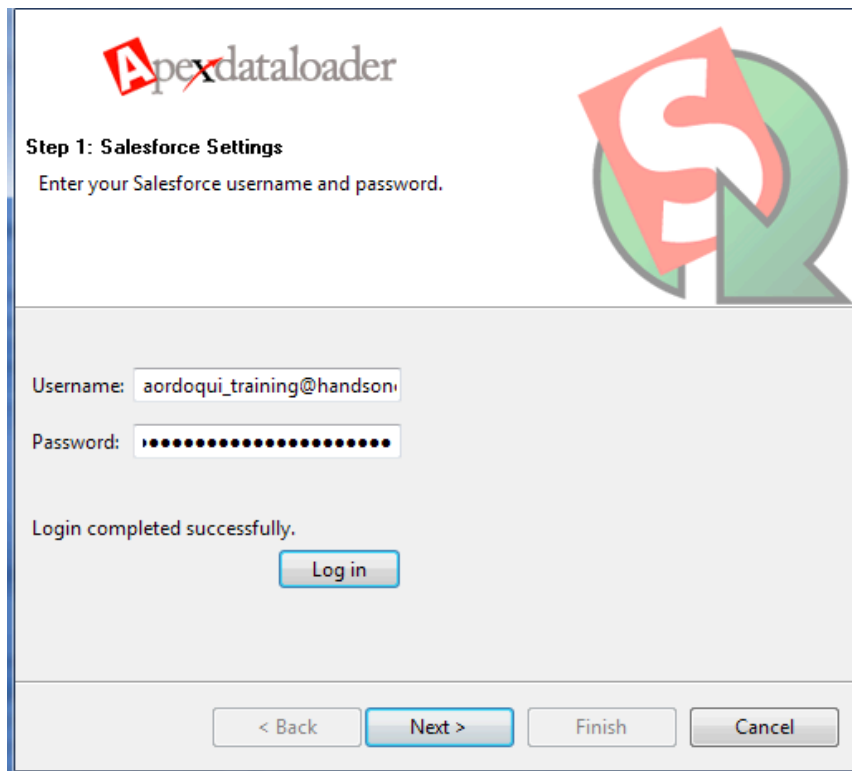
Open the Apex Data Loader and Select Export



Enter your username and password.

The password is your usual password followed immediately by the security token:
PasswordSecurityToken

Click Login, and then once successful click Next



Apexdataloader

Step 1: Salesforce Settings
Enter your Salesforce username and password.

Username: aordoqui_training@handson

Password: [REDACTED]

Login completed successfully.

Log in

< Back Next > Finish Cancel

From the Select Salesforce Object

1) Select the Object you wish to export.

Then click Browse to locate where to save the file. NOTE: you MUST enter the file extension .csv when saving the file to be able to use it for updating the records through the Data Loader.

Then click Next

Select Salesforce Object:

☐ Show all Salesforce objects

- Keyword (SFGA_Keyword_)
- Labels (HOC_Labels_c)
- Lead (Lead)
- Links (HOC_Links_c)
- Location (HOC_Location_)
- Occurrence (HOC_Occurr_)
- Opportunity (Opportunity)
- Organization (Account)**
- Other Settings (HOC_Other_)
- Price Book (Pricebook2)
- Product (Product2)

Choose a target for extraction: C:\Users\Art\Desktop\Organizations.csv

< Back Next > Finish Cancel

Selecting the Fields and Setting the Filters

You will now select the fields from the object that you wish to be present in the Export file.

1) Choose the query fields below. In this section you can select any of the available fields to export. At the very minimum we recommend the Id and Name fields. The Id field will be need to perform an update on the exported records and the Name field helps to identify the records you are working with

Step 3: Edit your Query

Edit the SOQL query for extraction.

1

Choose the query fields below.

☒ Id
☐ IsDeleted
☐ MasterRecordId
☒ Name

Select all fields Clear all fields

Create the where clauses to your query below

Fields

Add condition

The generated query will appear below. You may edit it before finishing.

Select Id, Name FROM Account

Selected fields

2) You can then select the clauses or filters for the query.

Fields: Any fields available in the object

Operation: select from equals, not equals, less than, greater than, less than or equals, greater than or equals.

Value: Enter any value that would be available or present in the selected field. Can leave blank if you want records that either contain no information in that field (field equals blank) or contains some information in that field regardless of what that information is (field not equals blank).

3) Once you've set the clause, click on Add Condition. (**Note:** you can add multiple clauses/filters to your query one at a time.)

Choose the query fields below.

Create the where clauses to your query below.

2 Fields

Type

Operation equals

Value Nonprofit

Add condition

3

4 Cancel

If picklist field, v...

If you add any clauses, they will appear here follow...

If you leave value blank it will say = " (for eq...

Select Id, Name FROM Account WHERE Type = 'Nonprofit' AND HOC_Primary_Contact_c = "

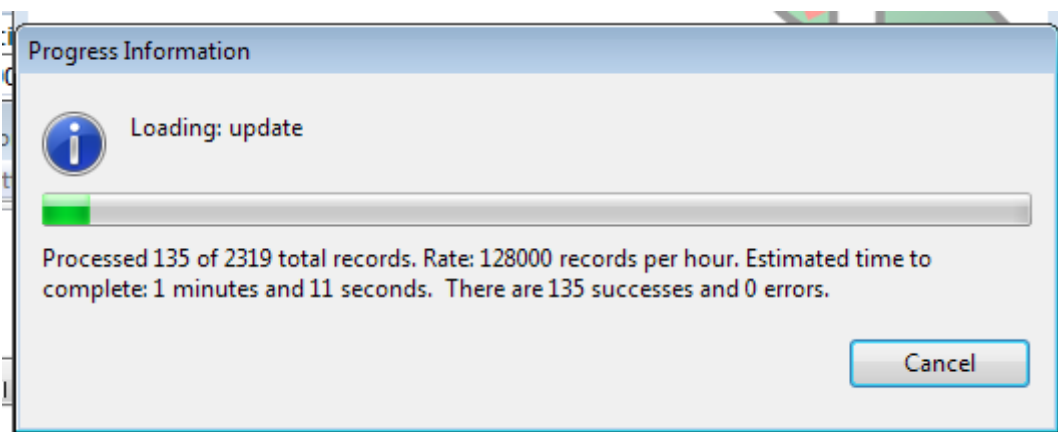
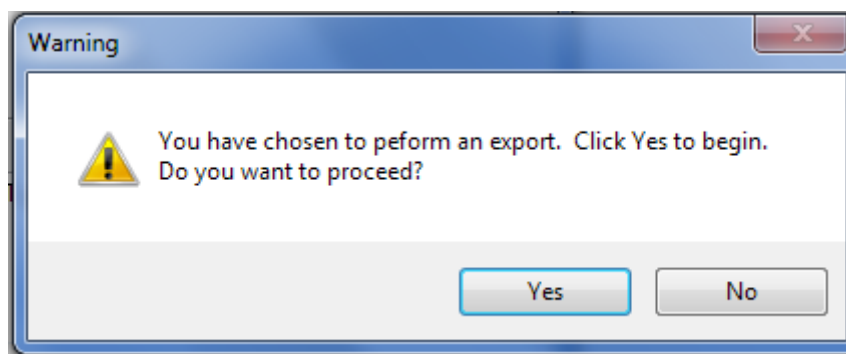
Finish

< Back

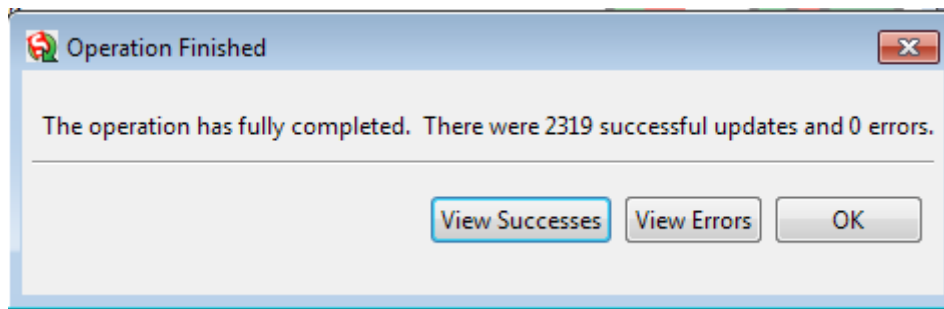
Next >

4) Once you have set the fields and clauses, click Finish.

You will receive a confirmation message to proceed. Click Yes.



Once the file has finished uploading, you'll receive a confirmation message. You can look at the error and success logs, or click OK to close the window and open the Error and Success logs from their saved locations.



You can now open the export file and make the necessary updates to the records and then use the Apex Data Loader or the data management tools in salesforce to update the records.

For a listing of the various posts on updating records/ data management, [click here](#).

Importing Occurrences via the Data Loader


Do you have lots of occurrences that you would like to get into your HOC system for already existing Volunteer Opportunities? The Data Loader (or similar tool) would be a great choice for getting that done. This is considered advanced data management, but you can do it!

Access the Data Mapping Table for preparing your data.

The Master field list will list all of the fields in each object and give the picklist values, help tips and notes. By using the Occurrences tab within the Data Mapping table, you will be able to prepare the file for import. [Click here](#) to access the Data Tables page in ZenDesk.

Keep in mind: Individually Scheduled Opportunities can only have ONE occurrence which is auto-created, so **only import occurrences for Date & Time Specific** volunteer opportunities.

Data Table Templates for HandsOn Connect

**Art Ordoqui**
January 06, 2011 19:13

Follow0

↑
4
↓
⚙

Here are the links to the Data tables to be used for data migrations.

These files are updated regularly as changes are made to the Field List. In addition to the tables in this post, clients will also need to reference the **Master Field List** to see the picklist values, help tips, and notes for these fields.

When you open the table below, go to File and select "Download as" and select the "CSV (Current Sheet)" and save it to your local system before you begin to populate the tables. You will find a different sheet for each object.

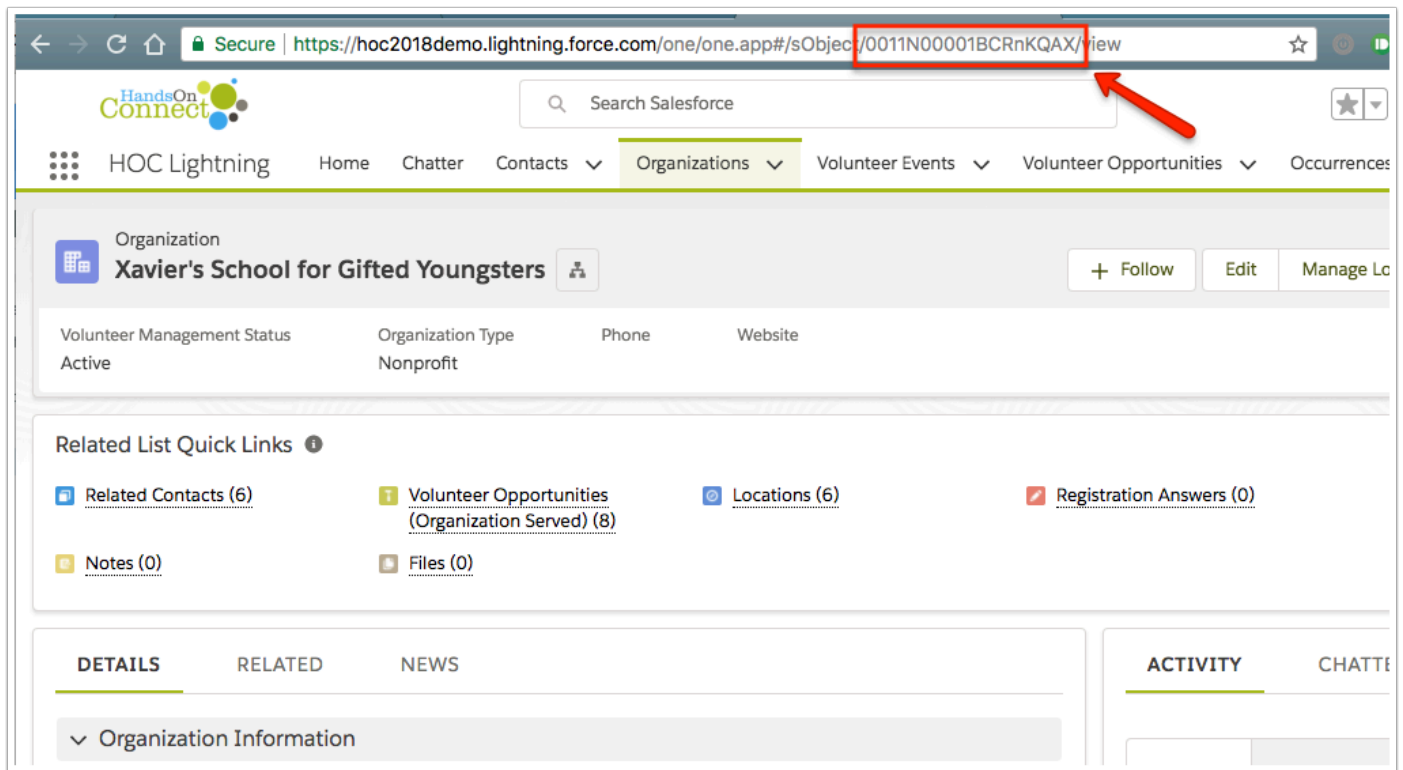
- **Full Set for Data Mapping** ←

Prepare Your Data

To add Occurrences, you will need some information from your system before you create your data file. You will need to know your:

- Volunteer Opportunity ID (Salesforce or Import ID)
- Volunteer Coordinator ID
- Location ID

You can find the ID from the address bar for each record.



Create your import file

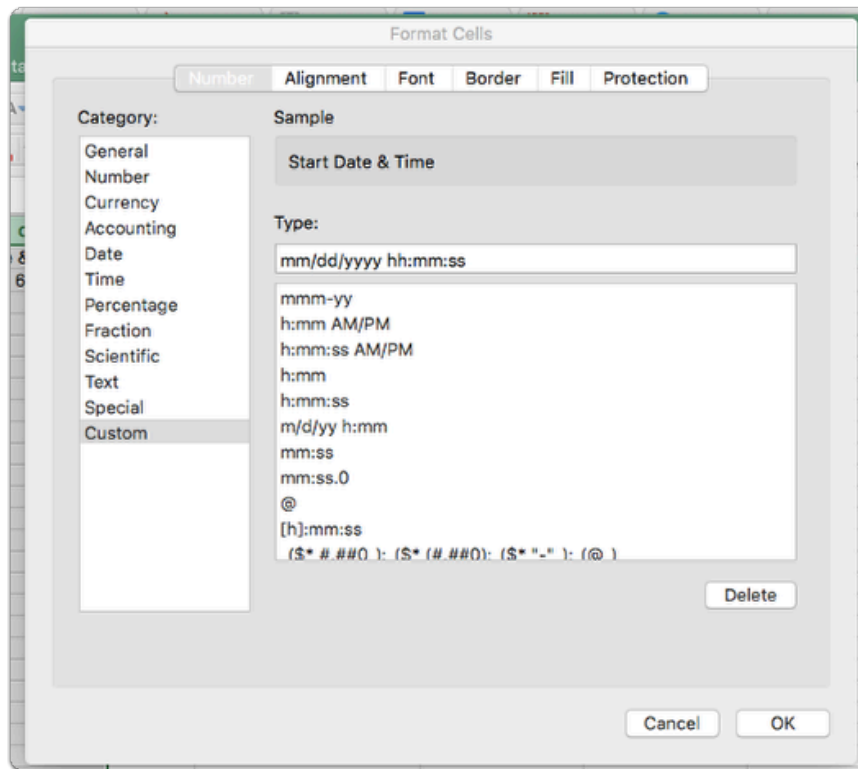
- Volunteer Opportunity = ID of the volunteer opportunity to which you are adding occurrences (can either be the Import ID or Salesforce ID)
- Start Date & Time
- End Date & Time
- Location = ID of the location for each occurrence
- Registration Cutoff (hours)
- Status = Active
- Maximum Attendance
- Minimum Attendance
- Opportunity Coordinator = ID for Opportunity Coordinator

The rest can be left blank and will either be populated with data from your Volunteer Opportunity or are updated at a later time.

A couple things to keep in mind on the dates:

- Your end time must be after your start time.
- The occurrence start and end dates must occur during the same day.
- These dates must be formatted correctly.

To properly format your Dates, change the cell type to Custom, and change the Type to: **mm/dd/yyyy hh:mm:ss**



Import your Data using the Data Loader

Here is an example of all of the fields necessary to import into the system. Save this file as a CSV, and you will then begin your import.

	A	B	C	D	E	F	G	H	I
	Volunteer Opportunity	Start Date & Time	End Date & Time	Location	Registration Cutoff (hours)	Status	Maximum Attendance	Minimum Attendance	Opportunity Coordinator
1	a0NA00000000IG7	09/05/2016 08:00:00	09/05/2016 08:00:00	a0BA000000034eBX	1	Active	20	1	003A000000HS7xN
2	a0NA00000000IG7	09/06/2016 08:00:00	09/06/2016 08:00:00	a0BA000000034eBX	1	Active	20	1	003A000000HS7xN
3	a0NA00000000IG7	09/07/2016 08:00:00	09/07/2016 08:00:00	a0BA000000034eBX	1	Active	20	1	003A000000HS7xN
4	a0NA00000000IG7	09/07/2016 08:00:00	09/07/2016 08:00:00	a0BA000000034eBX	1	Active	20	1	003A000000HS7xN

Open the Data Loader

Click on "Upsert" and then proceed to login to your system.

Load Inserts

Step 1: Log In

Log in to the Salesforce org that you're importing to or exporting from.

salesforce

☒ OAuth ☐ Password Authentication

Environment: Production

Log in

< Back Next > Cancel Finish

Link to the Occurrence Object

Select the Occurrence Object (HOC__Occurrence__c) and choose your CSV file for import. Then click on "Next." There will be another popup that tells you how many records will be imported. Click "OK."

Load Inserts

Step 2: Select data objects

Select your Salesforce object and your CSV file.

salesforce

Select Salesforce object:

☐ Show all Salesforce objects

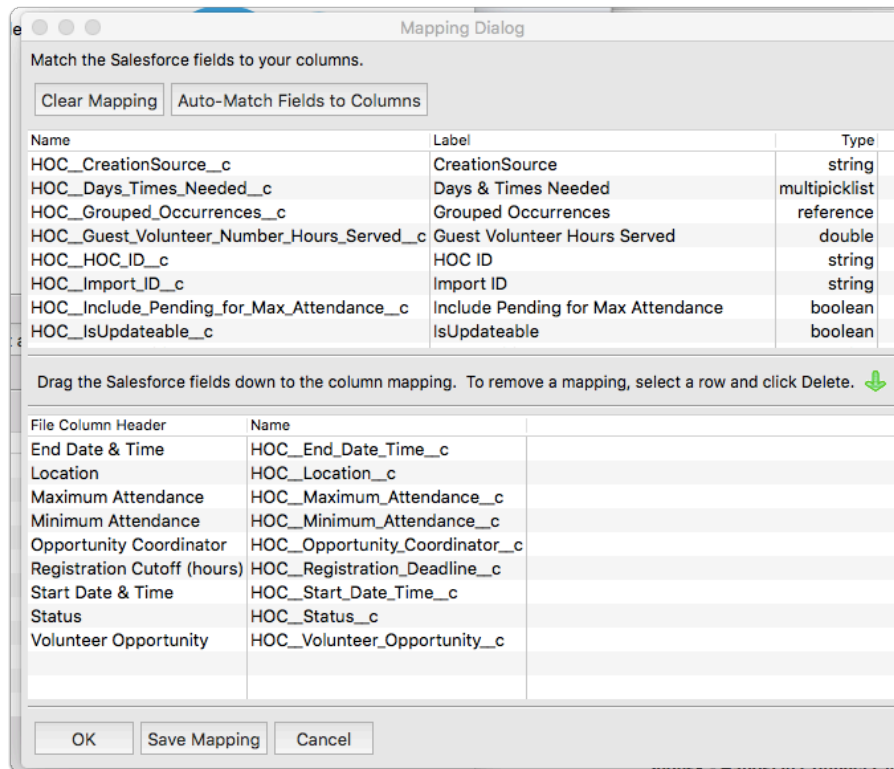
- Location Security (HOC__Location_Security__c)
- Member Security (HOC__Member_Security__c)
- ObjectChange (HOC__ObjectChange__c)
- Occurrence (HOC__Occurrence__c)**
- Occurrence Security (HOC__Occurrence_Security__c)
- Opportunity (Opportunity)
- Organization (Account)
- Other Settings (HOC__Other_Settings__c)

Choose CSV file: op/Occurrences Import.csv Browse...

< Back Next > Cancel Finish

Map your fields

Click on "Create or Edit a Map." The mapping dialog will pop up. You can click on "Auto-Match Fields to Columns" or click and drage the fields from the top to the bottom section if you would prefer. If you auto-match, you still should verify that the fields were matched appropriately. Click "OK" once all fields necessary have been matched. Then click on "Next."



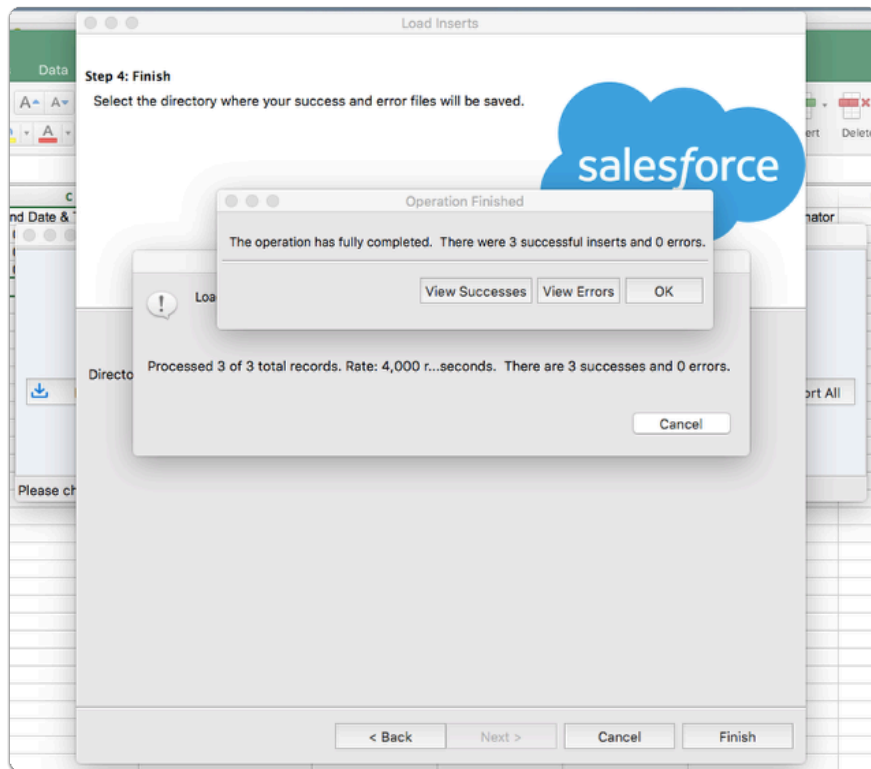
Select where to save the success/failure files

You should create a folder or designate a location for all success and failure files to be saved for your reference after your import.

Complete the Import

Click on "Finish" to begin the import. You will be prompted with a warning stating what you will be doing ("You have chosen to insert new records.") and you must confirm that this is what you wanted to do. As the data is being imported, you will see the successes and failures for the import.

You are then giving the opportunity to see your successes or any errors. Click "OK" to return to the main Data Loader screen.



Verify your data

Return to your Volunteer Opportunity to verify that your occurrences were appropriately created.

Volunteer Opportunity
Playful Puppies and Cuddly Kittens

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

« Back to List: Skill Ratings

Skill Ratings [1] | Required Prerequisite [0] | Used as Prerequisite for [0] | **Occurrences [5+]** | Recurrences [5+] | Grouped Occurrences [1] | Connections [5+] | Volunteer Opportunity Questions [2] | Open Activities [0]

Occurrences New Occurrence Occurrences Help ?

Action	Occurrence ID	Start Date & Time	End Date & Time	Status	Posting Status	Occurrence URL	Total Connections
Edit Del	QC-036239	6/7/2016 8:00 AM	6/7/2016 9:00 AM	Active	This is approved and published for volunteers to sign-up.	https://2015-hocdemo.cs51.force.com/HOC_Volunt...	0
Edit Del	QC-036238	6/6/2016 8:00 AM	6/6/2016 9:00 AM	Active	This is approved and published for volunteers to sign-up.	https://2015-hocdemo.cs51.force.com/HOC_Volunt...	0
Edit Del	QC-036237	6/5/2016 8:00 AM	6/5/2016 9:00 AM	Active	This is approved and published for volunteers to sign-up.	https://2015-hocdemo.cs51.force.com/HOC_Volunt...	0
Edit Del	QC-034589	5/21/2016 10:00 AM	5/21/2016 12:00 PM	Active	This is approved and published for volunteers to sign-up.	http://demo.handsonconnect.org/HOC_Volunteer_O...	11
Edit Del	QC-036235	5/20/2016 10:17 PM	5/21/2016 10:17 PM	Active	This is approved and published for volunteers to sign-up.	https://2015-hocdemo.cs51.force.com/HOC_Volunt...	1

Show 5 more » | Go to list (50+) »

Verifications Complete

Total Active Occurrences: 5

Total Verifications Due: 67

Batch updating Opportunity Approval and Volunteer Leader Approval Managers using the Apex Data Loader

The Opportunity Approval Manager and Volunteer Leader Approval Manager can be updated individually in the Organization Record.

For most action centers, the Opportunity Approval Manager and the Volunteer Leader Approval Manager is the same for all the organizations in your system; therefore, you may need to do a system wide change to update this value when staff has changed.

Unlike most updates in the system that can be done through the native Salesforce Data management tools, this process requires the use of the Apex Data Loader to update the records. Please visit [this post](#) for information on how to download the Apex Data Loader and for directions on accessing your Security Token which is also needed.

Creating the Report

Go to Reports and click on Create New Custom Report

Select Category: Organizations and Contacts

Select Report Type: Organizations

Click Create

To start, remove all the columns

Set the following filters:

Show: All Organizations

Date Field: Created Date

Range: All Time

Add Filter: Organization Name not equal to Individual

Columns to Add

Organization ID (Salesforce.com ID)

Opportunity Approval Manager

Volunteer Leader Approval Manager

Optional Columns to Add

Organization Name

Run the report and export as .csv

NOTE: If you have specific Opportunity and/or Volunteer Leader approval manager(s) based on the organization involved, then you can use the filter Opportunity Approval Manager equals (name of person currently in this role that you want to change). This will filter to just those organizations rather than all the organizations in the system using the process above.

Report Properties **Run Report** 7

Filters Add ▾

2 Show All organizations ▾

Date Field Created Date ▾ Range All Time 4 ▾ From To

3 Organization Name not equal to "Individual" 5

Preview Tabular Format ▾ Show ▾ Remove All Columns 1

Organization ID	Opportunity Approval Manager	Volunteer Leader Approval Manager
001A000000R9c6S	Larry Deckel	-
001A000000R9c6T	Larry Deckel	-
001A000000R9c6U	Larry Deckel	-
001A000000R9c6V	Larry Deckel	-
001A000000R9c6W	Larry Deckel	-

6

Editing the Table

Save the exported table as an archive.

Open the Exported table and make the following changes:

Change the name in the Opportunity Approval Manager and/or Volunteer Leader Approval Manager to the Salesforce.com ID for the user that will now be in that role.

To find the Salesforce.com ID for the user, go to Setup/ Admin Setup/ Manage Users/ Users.

Find the User that will be in this new role and click on their name to go to the User Detail.

In the user detail record, look at the URL, the Salesforce.com ID is the alphanumeric value between the / and the ?. See screenshot below.

Copy and paste the Salesforce.com ID for all the rows in the appropriate column.

Delete the Report Footer

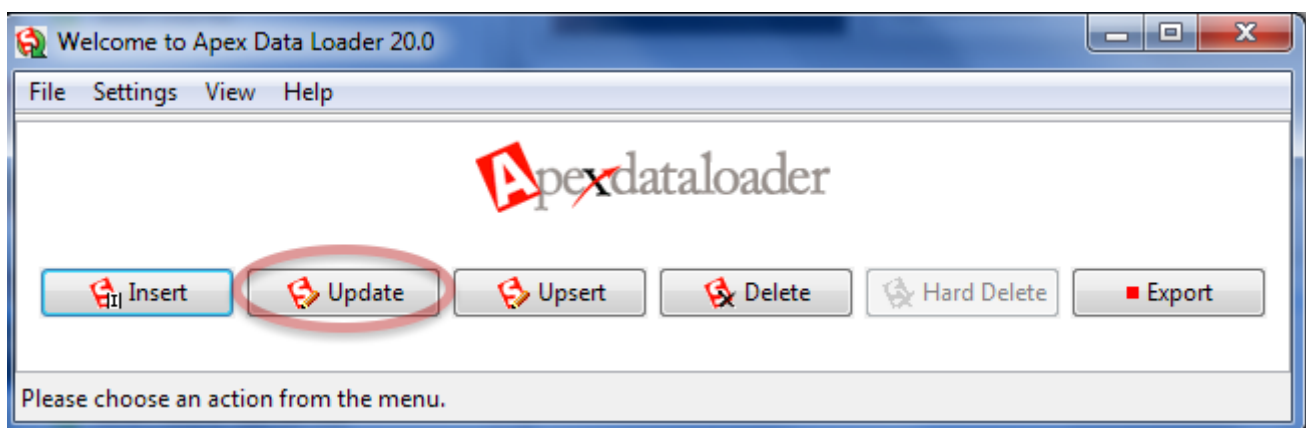
Save the changes to the table as a new file to update using the Data Loader.

The screenshot shows a Salesforce table with three columns: A, B, and C. The table contains data for 'Organization ID', 'Opportunity Approval Manager', and 'Volunteer Leader Approval Manager'. A red circle highlights the 'Opportunity Approval Manager' column, and a red arrow points to the 'Volunteer Leader Approval Manager' column. A text box says 'Salesforce.com ID. Does not include the / or ?'. Another text box says 'Salesforce.com ID for the new users in the respective r...'. A 'Delete' button is visible at the bottom right.

	A	B	C
1	Organization ID	Opportunity Approval Manager	Volunteer Leader Approval Manager
2324	001A000000R9cHC	005A0000000be5z	005A0000000bf81
2325	001A000000R9cHD	005A0000000be5z	005A0000000bf81
2326	001A000000RAO8R	005A0000000be5z	005A0000000bf81
2327	001A000000TId1c	005A0000000be5z	005A0000000bf81
2328	001A000000Ywfh1	005A0000000be5z	005A0000000bf81
2329	001A000000H0NI2	005A0000000be5z	005A0000000bf81
2330	001A000000KJqVt	005A0000000be5z	005A0000000bf81
2331	001A000000KKwcA	005A0000000be5z	005A0000000bf81
2332	001A000000Py7AG	005A0000000be5z	005A0000000bf81
2333			
2334			
2335	Organization List Report		
2336	Copyright (c) 2000-2011 salesforce.com, inc. All rights reserved.		
2337	Confidential Information - Do Not Distribute		
2338	Generated By: Art Ordoqui 4/22/2011 11:46 AM		
2339	HandsOn Connect Demo		
2340			

Apex Data Loader

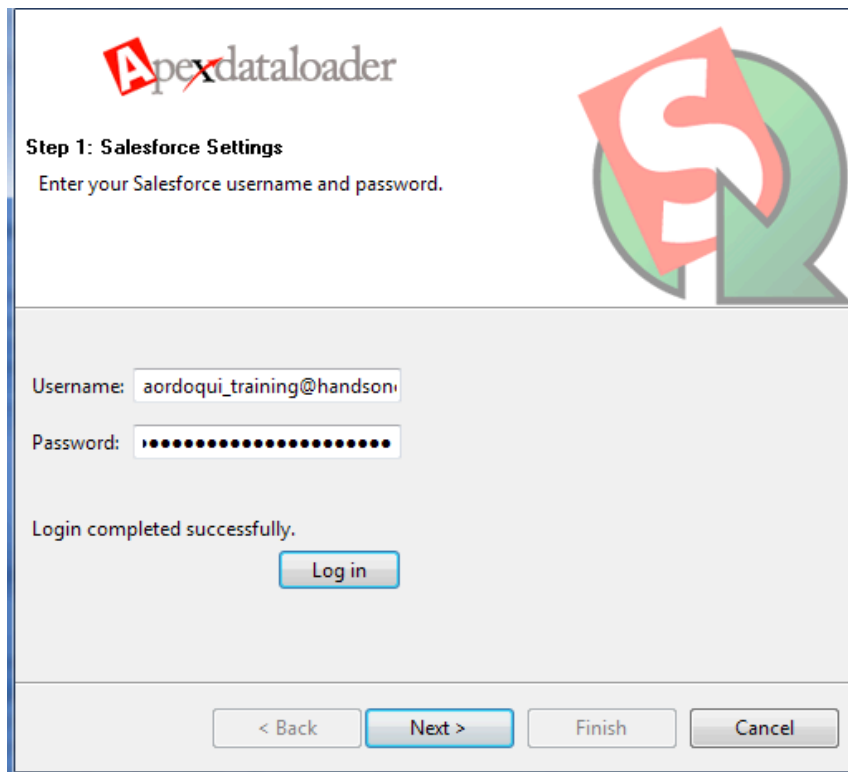
Open the Apex Data Loader and Select Update



Enter your username and password.

The password is your usual password followed immediately by the security token:
PasswordSecurityToken

Click Login, and then once successful click Next



Apexdataloader

Step 1: Salesforce Settings
Enter your Salesforce username and password.

Username:

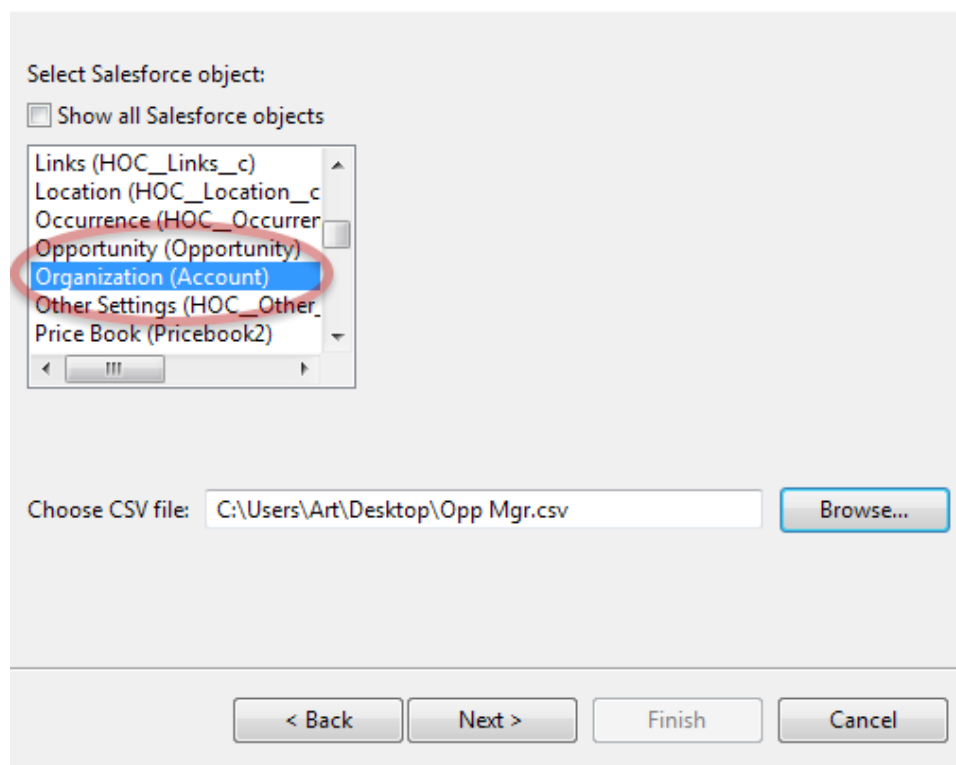
Password:

Login completed successfully.

From the Select Salesforce Object- select Organization (Accounts)

Then click Browse to locate the file with the update Opportunity and Volunteer Leader Approval Managers

Then click Next



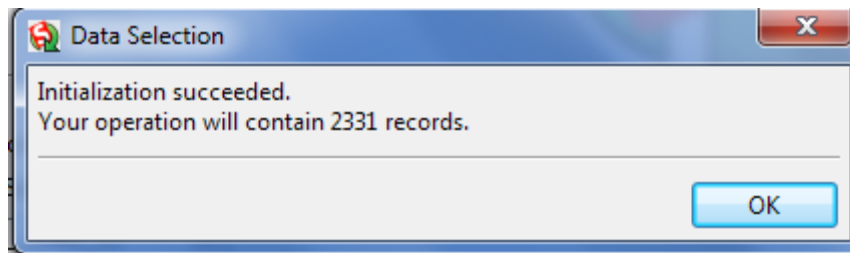
Select Salesforce object:

☐ Show all Salesforce objects

- Links (HOC_Links_c)
- Location (HOC_Location_c)
- Occurrence (HOC_Occurrence)
- Opportunity (Opportunity)
- Organization (Account)**
- Other Settings (HOC_Other)
- Price Book (Pricebook2)

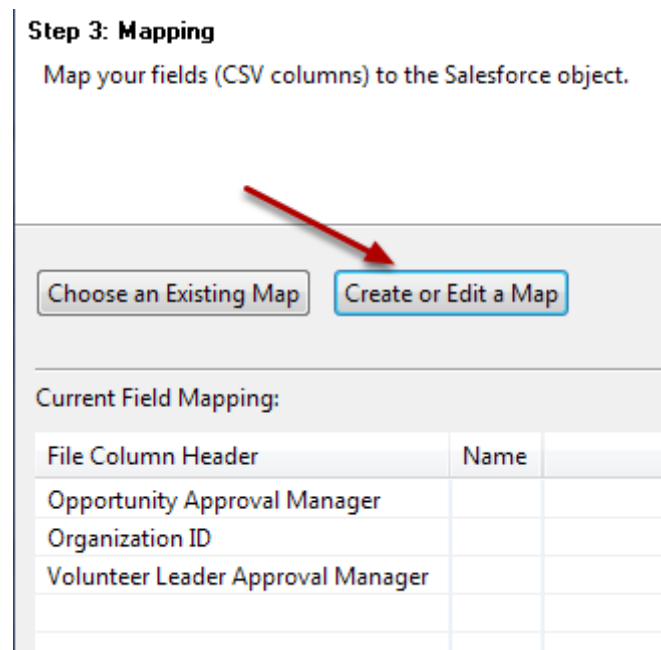
Choose CSV file:

The system will initialize the file and confirm for you how many records (rows) are in your table.
Click OK.



You will now map the items in your table to the items in HandsOn Connect.

1) Click on Create or Edit Map



2) If you didn't change the names of the column headers, you can select "Auto-Match Fields to Columns." Otherwise, you will need to manual click and drag the field labels from the top to the bottom.

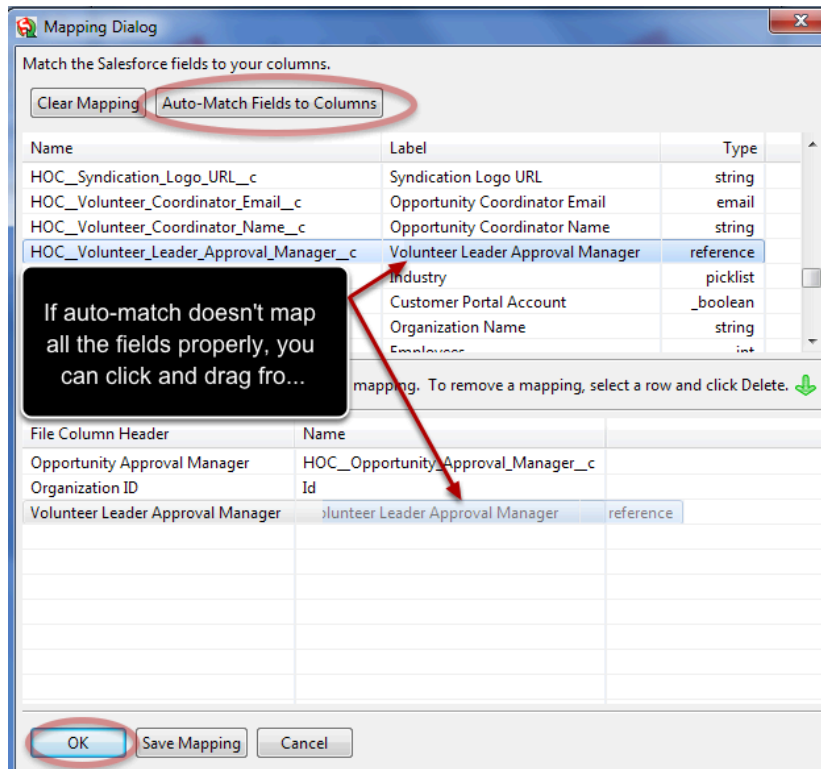
The fields should be mapped as follows:

Opportunity Approval Manager: HOC__Opportunity_Approval_Manager__c

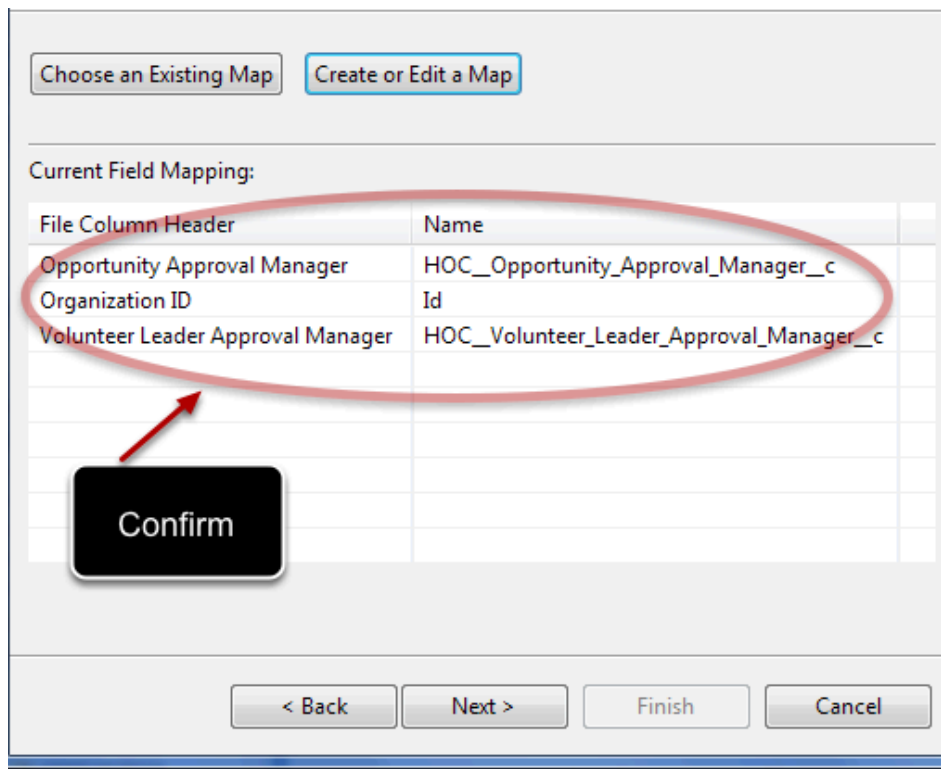
Organization ID: Id

Volunteer Leader Approval Manager: HOC__Volunteer_Leader_Approval_Manager__c

3) Once all the fields are mapped as needed, click on OK



Confirm that your fields are mapped correctly and click Next



Every time you use the Data Loader, two log files are created, an error log and a success log. Click Browse to identify a location where you want those logs saved.

Once you have identified the location for the log files, click Finish.

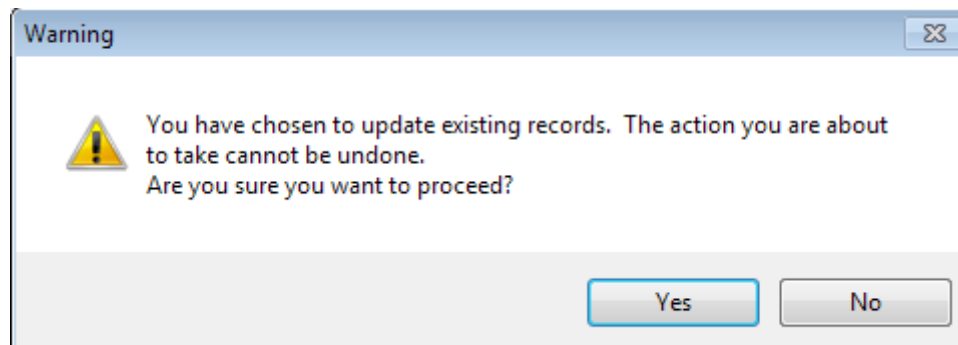
Step 4: Finish

Select the directory where your success and error files will be saved.

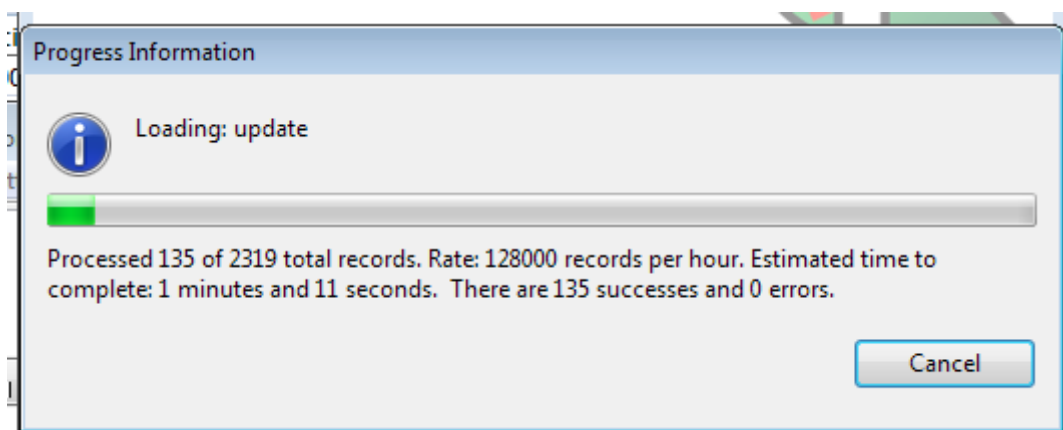


Directory:

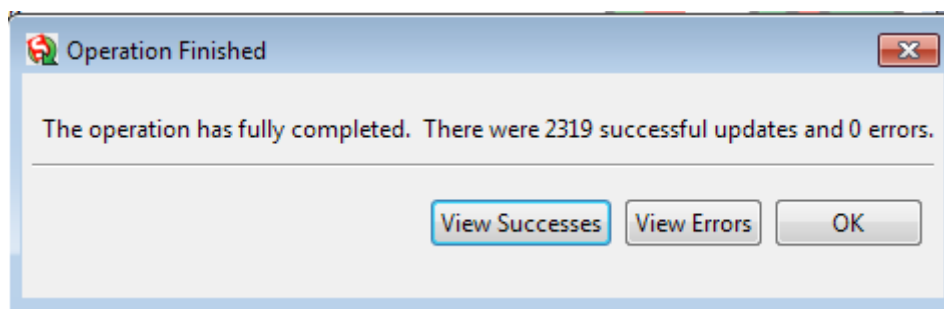
It will provide you with a warning message that once updated, it can't be undone. Click OK



While the records are being uploaded, you'll see a progress bar indicating how many successes and errors are occurring along the way, if any errors, and how much time it will take.



Once the file has finished uploading, you'll receive a confirmation message. You can look at the error and success logs, or click OK to close the window and open the Error and Success logs from their saved locations.



Once it is completed, please check to ensure that the Opportunity and/or Volunteer Leader Approval Managers were updated properly.

Importing Notes to Organization and Contact Records using the Apex Data Loader

The ability to attach notes to Organization and Contact records exists within Salesforce. These can be added individually by going to the organization or contact record, but you can also import a number of notes at once from an outside system. This post will show you how to prepare the .csv file for importing the notes.

Unlike most updates in the system that can be done through the native Salesforce Data management tools, this process requires the use of the Apex Data Loader to update the records. Please visit [this post](#) for information on how to download the Apex Data Loader and for directions on accessing your Security Token which is also needed.

NOTE: The same process can be followed to import notes into other records, you just need to make sure that you have the Salesforce.com ID for the record you wish to attach the note.

Creating the Table

The unique thing about notes is that the table is, for the most part, created outside of Salesforce reports.

To import Notes to the Organization or Contact record you need the following:

Organization or Contact Salesforce.com ID (Required)

Organization or Contact Name (optional)

Title (of the note)

Body (content of the note)

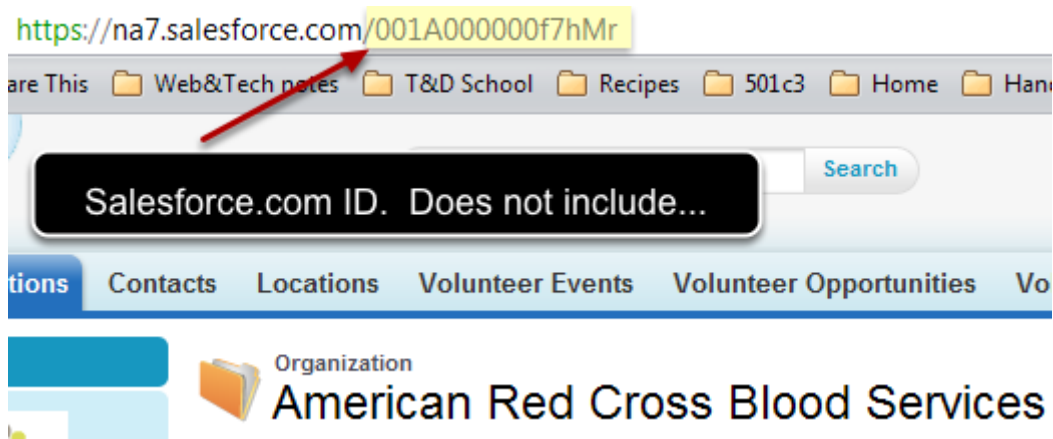
Private (privacy of the note)

A template for Importing Notes can be found in the [Shared Resources](#)

Getting the Salesforce.com ID

There are two ways to access the Salesforce.com ID for Organizations and Contacts.

1) Go to the Organization or Contact record and copy the ID from the URL



2) You can run a report that includes the Organization or Contact name and the Salesforce.com ID.

For this example, we will create a new Report

Go to Reports and click on the Create New Custom Report button.

Select Category: Organizations & Contacts

Select Report Type: Contacts & Organizations

Create New Report

Select Report Type



Once in the Create a Report screen:

1) Add the filters, if any, to yield the Organizations or Contacts that you need for importing the notes.

2) Show: All Organizations

3) Date Field: Created Date (Can modify if necessary to get the desired records)

4) Range: All Time (Can modify if necessary to get the desired records)

5) For this report, I believe it is easier to start with a blank slate, so click on Remove all Columns. You can opt to leave the columns, but here's the information that you need:

6) Columns to Add

Organization ID (Salesforce.com ID field)

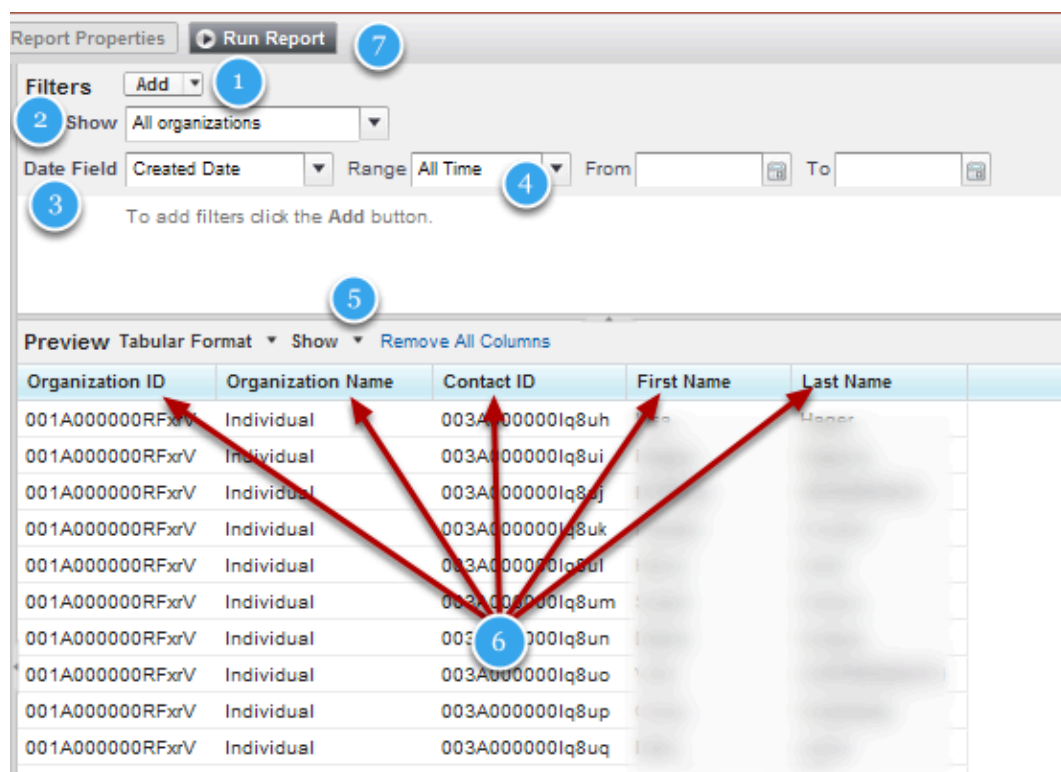
Organization Name

Contact ID (Salesforce.com ID field)

First Name

Last Name

7) Run Report



Populating the Table

Once you have the Salesforce.com ID(s) you can now populate the Notes template as needed.

Required Fields are:

Organization/Contact ID

Title (Up to 80 characters)

Body (up to 32KB of Data)

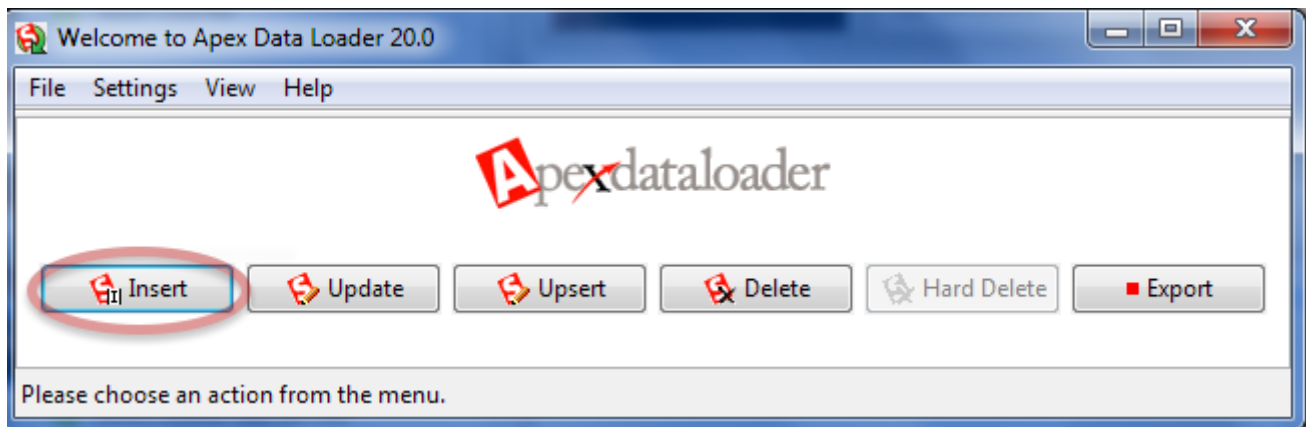
Private (Should be populated with TRUE or FALSE)

A	B	C	D	E
Organization/Contact ID	Org/Contact Name (Optional)	Title	Body	Private
001A000000dHaTU	Art in Texas	Application	Art submitted application on March 21,2011	FALSE
001A000000dHafz	TroutCo	Site Visit	Conducted site visit on March 23, 2011 facility is handicap accessible. Have an on-site Vol Coord interested in MLK Project Site	FALSE
001C000000dHaTa	Art Partner	follow-up	Had a call with Art Partner on 3/28 as follow-up to on application.	TRUE

Once you have all the notes that you want to import, save the file and open the Apex Data Loader to perform an Insert.

Apex Data Loader



Open the Apex Data Loader and Select Insert



Enter your username and password.

The password is your usual password followed immediately by the security token:
PasswordSecurityToken

Click Login, and then once successful click Next



Step 1: Salesforce Settings
Enter your Salesforce username and password.

Username:

Password:

Login completed successfully.

From the Select Salesforce Object

1) Check the box for Show all Salesforce objects

2) Select Note (Note)

Then click Browse to locate the file with the notes

Then click Next

Select Salesforce object:

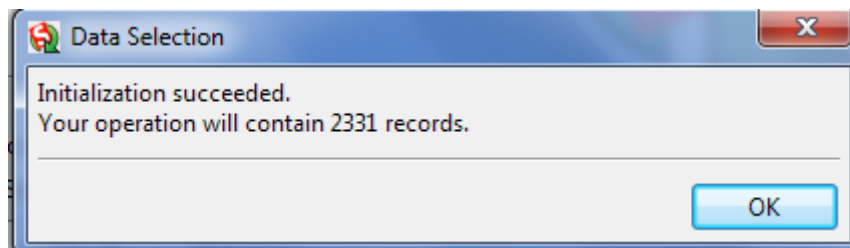
☒ Show all Salesforce objects

- Letterhead (BrandTemplate)
- Links (HOC__Links__c)
- Location (HOC__Location__c)
- Mail Merge Template (MailMergeTemplate)
- Note (Note)
- Note Tag (NoteTag)
- Occurrence (HOC__Occurrence)
- Opportunity (Opportunity)
- Opportunity: Competitor (OpportunityCompetitor)
- Opportunity Product (OpportunityProduct)

Choose CSV file: C:\Users\Art\Desktop\Notes Template.csv Browse...

< Back Next > Finish Cancel

The system will initialize the file and confirm for you how many records (rows) are in your table. Click OK.

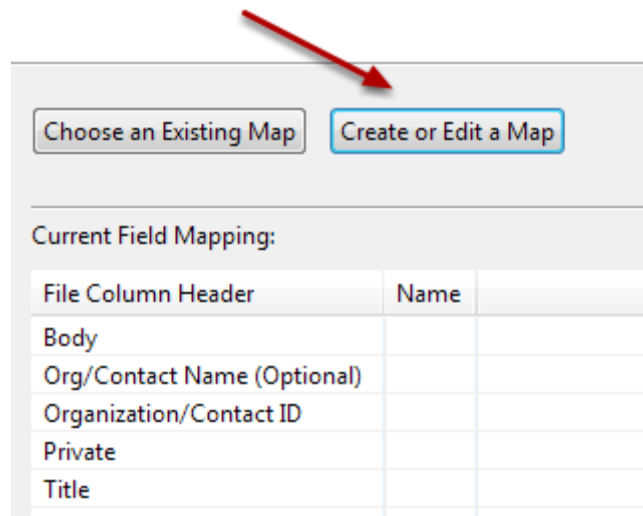


You will now map the items in your table to the items in HandsOn Connect.

1) Click on Create or Edit Map

Step 3: Mapping

Map your fields (CSV columns) to the Salesforce object.



The screenshot shows a web interface for mapping CSV fields to Salesforce objects. At the top, there are two buttons: "Choose an Existing Map" and "Create or Edit a Map". A red arrow points to the "Create or Edit a Map" button. Below the buttons, the section is titled "Current Field Mapping:". It contains a table with three columns: "File Column Header", "Name", and an empty column for mapping. The rows in the table are: "Body", "Org/Contact Name (Optional)", "Organization/Contact ID", "Private", and "Title".

File Column Header	Name	
Body		
Org/Contact Name (Optional)		
Organization/Contact ID		
Private		
Title		

2) If you didn't change the names of the column headers in the template, you can select "Auto-Match Fields to Columns" and all but the ID field will be mapped. For the Organization/Contact ID field, you will need to manual click and drag the field labels from the top to the bottom.

The fields should be mapped as follows:

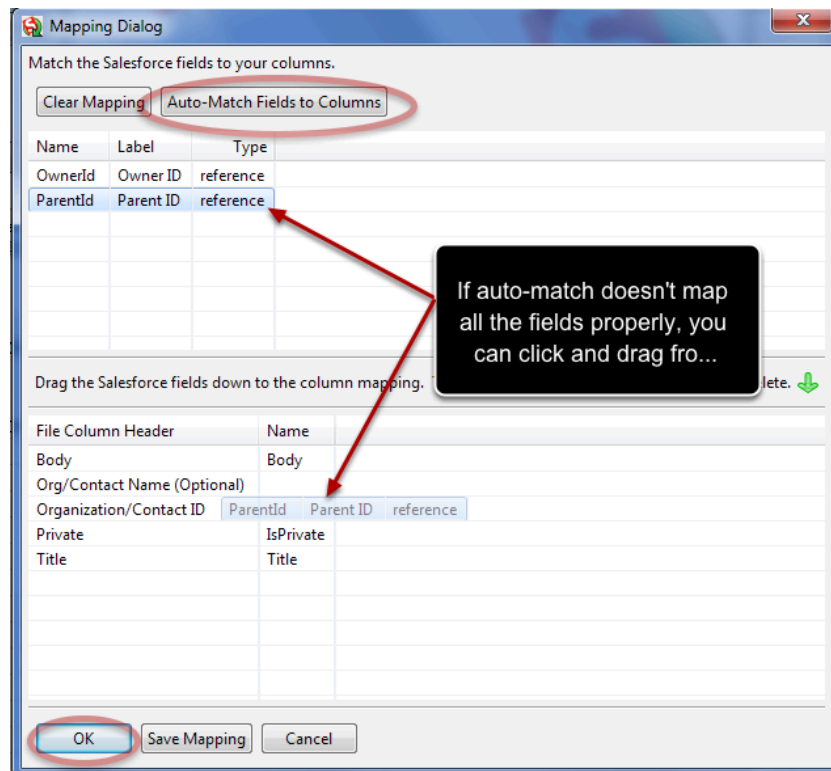
Body to Body

Organization/Contact ID to ParentId

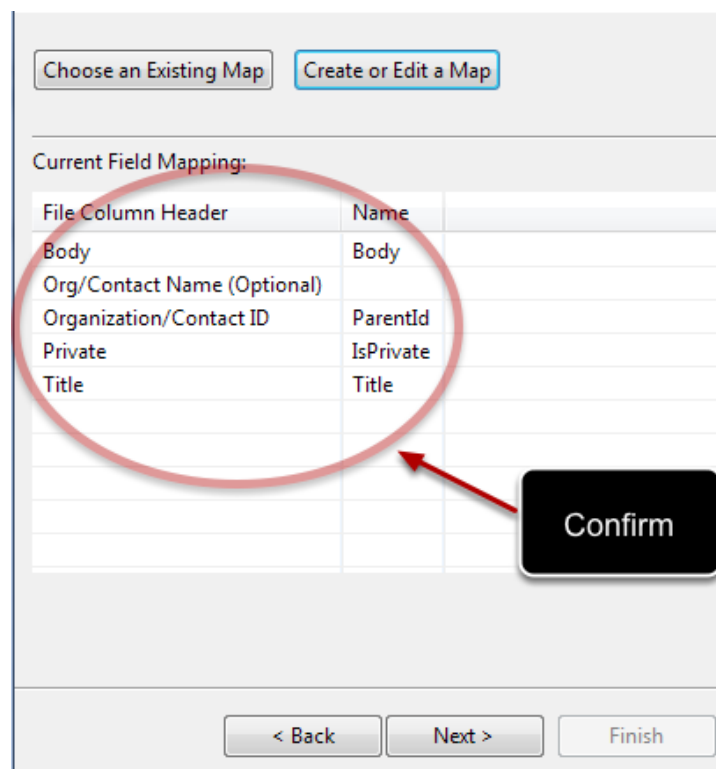
Private to IsPrivate

Title to Title

3) Once all the fields are mapped as needed, click on OK



Confirm that your fields are mapped correctly and click Next



Every time you use the Data Loader, two log files are created, an error log and a success log. Click Browse to identify a location where you want those logs saved.

Once you have identified the location for the log files, click Finish.

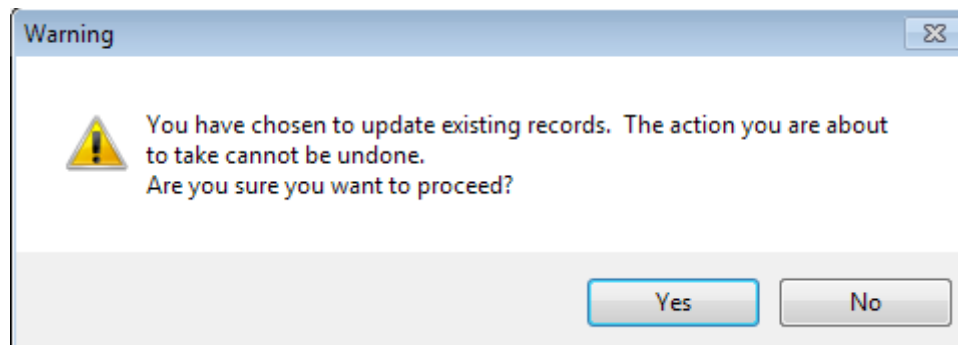
Step 4: Finish

Select the directory where your success and error files will be saved.

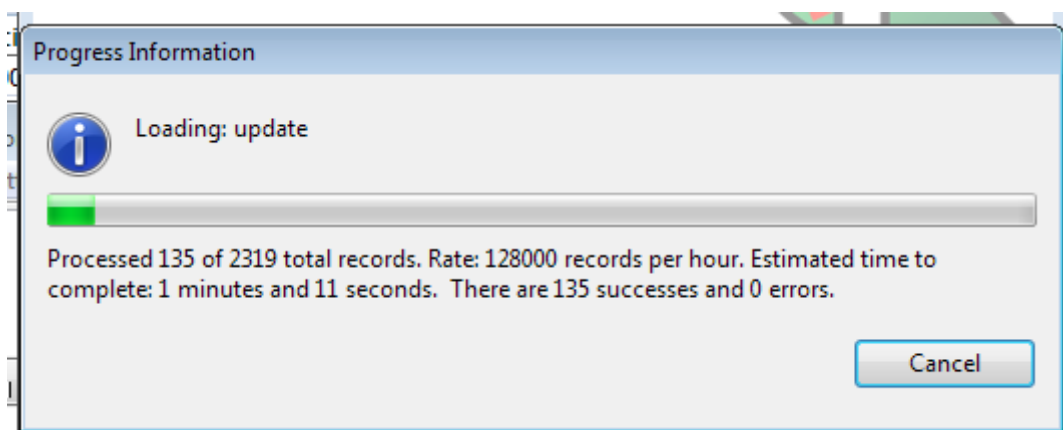


Directory:

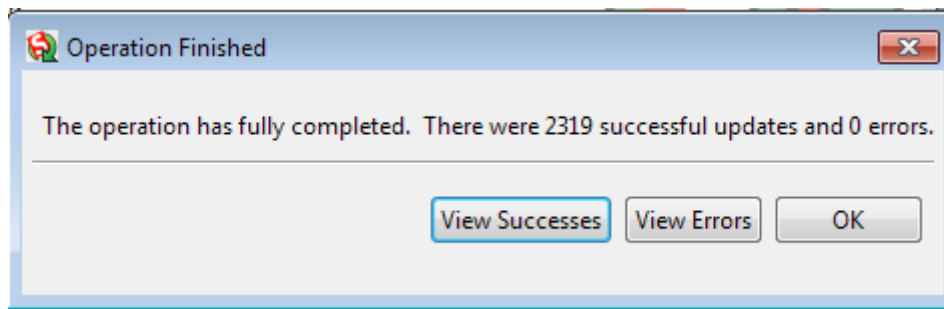
It will provide you with a warning message that once updated, it can't be undone. Click OK



While the records are being uploaded, you'll see a progress bar indicating how many successes and errors are occurring along the way, if any errors, and how much time it will take.



Once the file has finished uploading, you'll receive a confirmation message. You can look at the error and success logs, or click OK to close the window and open the Error and Success logs from their saved locations.



Once it is completed, please check to ensure that the Notes were Imported properly.

Uploading Users into HandsOn Connect Using the Apex Data Loader

This lesson assumes that you have already imported contacts into the system for the users that you wish to create and that you have already set up the Apex Data Loader.

Write a report to capture the First Name, Last Name, Email, and Salesforce ID of the contacts you wish to create users for.

Contact Mailing List Report

Report Generation Status: Complete

Report Options:

Summarize information by: Show:

Time Frame

Date Field: Range: From: To:

Run Report Hide Details Customize Save As Printable View Export Details Add to Campaign

Filtered By: Edit
Email not equal to Clear

First Name	Last Name	Email	Contact ID
Davis ReachOut	Kirby	davis.kirby+reachout@gmail.com	003A000000n06T2
Davis Vol Coord	Kirby	davis.kirby+volcoord@gmail.com	003A000000n06T3
Michael	Gauda	jochua.c.kidd+target7@gmail.com	003A000000p8n9d
Connie	Burd	jochua.c.kidd+target8@gmail.com	003A000000p8n9e
Charles	Johnson	jochua.c.kidd+target3@gmail.com	003A000000p8nYH
Maxine	Burr	jochua.c.kidd+target6@gmail.com	003A000000p8ncw
Susann	Porter	jochua.c.kidd+target1@gmail.com	003A000000p8nV4
Mark	Ott	jochua.c.kidd+target2@gmail.com	003A000000p8nWL
Linda	Sprinkle	jochua.c.kidd+target4@gmail.com	003A000000p8nXA
Eugene	Blondeau	eugene.blondeau@gmail.com	003A000000n13Ex

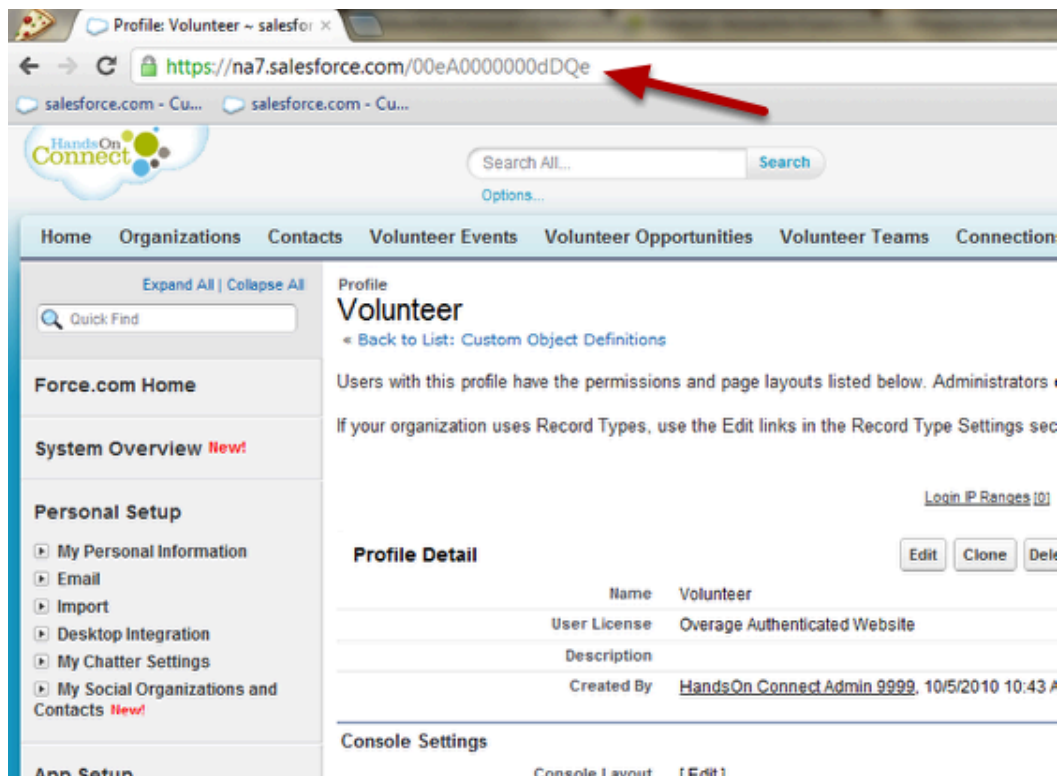
Create a new report using the "Contacts & Organizations" type. Your report needs to have 4 fields, First Name, Last Name, Email, and Contact ID. Set a filter to exclude record where the Email field is empty, along with any other filters you need to narrow down your list of users. After you have run your report, click the "Export Details" button. Export File Format should be "Comma Delimited .csv." Click "Export."

Fill out the user template spreadsheet.

	A	B	C	D	E	F	G	H	I	J	K	L
1	First Name	Last Name	Email	Contact ID	Username	Profile ID	IsActive	Alias	TimeZoneSidKey	LocaleSidKey	EmailEncodingKey	LanguageLocaleKey
2	Davis ReachOut	Kirby	davis.kirby+reachout@gmail.com	003A000000n06T2	davis.kirby+reachout@gmail.com		TRUE	DKirb	America/Chicago	en_US	ISO-8859-1	en_US
3	Davis Vol Coord	Kirby	davis.kirby+volcord@gmail.com	003A000000n06T3	davis.kirby+volcord@gmail.com		TRUE	DKirb	America/Chicago	en_US	ISO-8859-1	en_US
4	Michael	Gaona	jochua.c.kidd+target7@gmail.com	003A000000pBn9d	jochua.c.kidd+target7@gmail.com		TRUE	MGaon	America/Chicago	en_US	ISO-8859-1	en_US
5	Connie	Byrd	jochua.c.kidd+target8@gmail.com	003A000000pBn9e	jochua.c.kidd+target8@gmail.com		TRUE	CByrd	America/Chicago	en_US	ISO-8859-1	en_US
6	Charles	Johnson	jochua.c.kidd+target3@gmail.com	003A000000pBnYH	jochua.c.kidd+target3@gmail.com		TRUE	CJohn	America/Chicago	en_US	ISO-8859-1	en_US
7	Maxine	Burr	jochua.c.kidd+target6@gmail.com	003A000000pBncw	jochua.c.kidd+target6@gmail.com		TRUE	MBurr	America/Chicago	en_US	ISO-8859-1	en_US
8	Susann	Porter	jochua.c.kidd+target1@gmail.com	003A000000pBnV4	jochua.c.kidd+target1@gmail.com		TRUE	SPort	America/Chicago	en_US	ISO-8859-1	en_US
9	Mark	Ott	jochua.c.kidd+target2@gmail.com	003A000000pBnWL	jochua.c.kidd+target2@gmail.com		TRUE	MOtt	America/Chicago	en_US	ISO-8859-1	en_US
10	Linda	Sprinkle	jochua.c.kidd+target4@gmail.com	003A000000pBnXA	jochua.c.kidd+target4@gmail.com		TRUE	LSpri	America/Chicago	en_US	ISO-8859-1	en_US

You can download a user template from this link: http://handsonconnect.zendesk.com/attachments/token/apkacxrtijfkvgc/?name=user_template.csv or simply create a spreadsheet with the following column headings: First Name, Last Name, Email, Contact ID, Username, Profile ID, IsActive, Alias, TimeZoneSidKey, LocaleSidKey, EmailEncodingKey, and LanguageLocaleKey. Username should be an exact copy of the Email column. Alias should be the first letter of the First Name followed by the first 4 letters of the Last Name. The following Excel formula should work: =LEFT(A2,1)&LEFT(B2,4) TimeZoneSidKey should be your time zone in a valid Salesforce format (e.g. America/New_York, America/Chicago, etc.) IsActive should be True. LocaleSidKey and LanguageLocaleKey should be en_US. EmailEncodingKey should be ISO-8859-1.

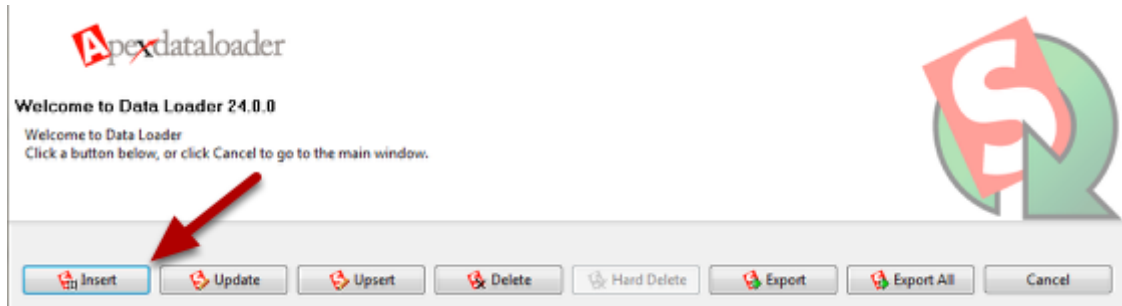
Filling in the Profile ID column



To find the profile ID for a user, log into Salesforce and go to: Setup > Administration Setup > Manage Users > Profiles. Click on the Profile you wish to assign to your users, it should be either

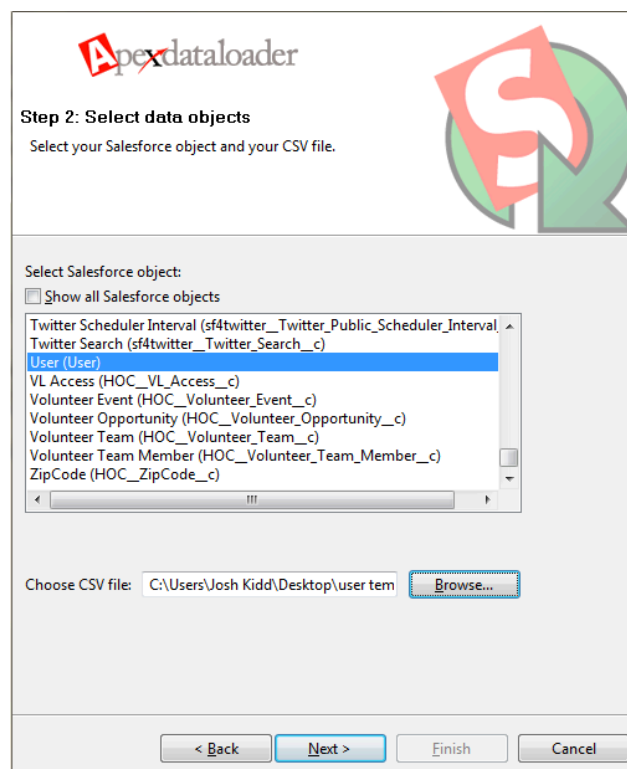
Partner Staff, Volunteer, or Volunteer Leader. The Profile ID is the last 15 characters of the URL address, up to but not including the slash. Copy that string into the Profile ID column on your spreadsheet and save it as a CSV file.

Open the Apex Data Loader and Insert Records



Open your Apex Data Loader and press the insert button. For the first Data Loader operation, you will be asked to log in. Enter your Salesforce Username and Password. REMEMBER TO APPEND YOUR SECURITY TOKEN TO THE END OF THE PASSWORD. Click Login, then click Next.

Select the object and file




Select User in the Salesforce object list. Then click browse to find the file you just created. Then click Next.

Create the field mapping

Match the Salesforce fields to your columns.



Name	Label	Type
AboutMe	About Me	textarea
CallCenterId	Call Center ID	reference
City	City	string
CommunityNickname	Community Nickname	string
CompanyName	Company Name	string
Country	Country	string
CurrentStatus	Current Status	textarea
DefaultGroupNotificationFrequency	Default Notification Frequency when Joining Groups	picklist

Drag the Salesforce fields down to the column mapping. To remove a mapping, select a row and click Delete. 

File Column Header	Name
Alias	Alias
Contact ID	ContactId
Email	Email
EmailEncodingKey	EmailEncodingKey
First Name	FirstName
IsActive	IsActive
LanguageLocaleKey	LanguageLocaleKey
Last Name	LastName
LocaleSidKey	LocaleSidKey
Profile ID	ProfileId

On the Mapping screen press "Create or Edit Map." On the screen that pops up, click "Auto-Match Fields to Columns" then click "OK." The window will close and you will be back on the Mapping screen. Click Next.

Select log location



Step 4: Finish
Select the directory where your success and error files will be saved.

Directory:

On the Finish screen, click Browse and find the directory where you want to store the success and error logs. Then click Finish. Your users should then be loaded into HandsOn Connect.

Bulk Uploading Connections with the Apex Data Loader

The Apex Data Loader is currently the only way to bulk upload Connections into HandsOn Connect. This walks you through connecting a list of Contacts to a specific Occurrence. The tutorial assumes that you have basic knowledge of Salesforce reporting and that you have set up the Apex Data Loader.

Create a report of the Contacts that you want to create Connections for

Contact Mailing List Report
Report Generation Status: Complete

Report Options:

Summarize information by: Show:

Time Frame:
Date Field: Range:
From: To:

Contact ID	First Name	Last Name	Organization Name	Created Date
0034000000pBnV4	Susann	Porter	Target	7/25/2011
0034000000pBnVL	Mark	Ott	Target	7/25/2011
0034000000pBnYH	Charles	Johnson	Target	7/25/2011
0034000000pBnXA	Linda	Sprinkle	Target	7/25/2011
0034000000pBncw	Maxine	Burr	Target	7/25/2011
0034000000pBn9d	Michael	Gaona	Target	7/25/2011
0034000000pBn9e	Connie	Burd	Target	7/25/2011
0034000000pBozr	Bob	Smith	Missing in Action	7/25/2011
0034000000pBy8Y	John	Target	Target	7/25/2011
Grand Totals (9 records)				

Create a report using the "Contacts & Organizations" type. Make sure that the report has the Contact ID field in it. Any other fields that you need to help you be sure you are getting the right Contacts can also be added. Set up any filters that you need to get only the Contacts that you need. If you know that you bulk uploaded all of the Contacts that you need on a specific day, you may want to limit the Created Date to that day. When you have run the report, click "Export Details." Export File Format should be "Comma Delimited .csv." Click Export.

Create a Connections template sheet.

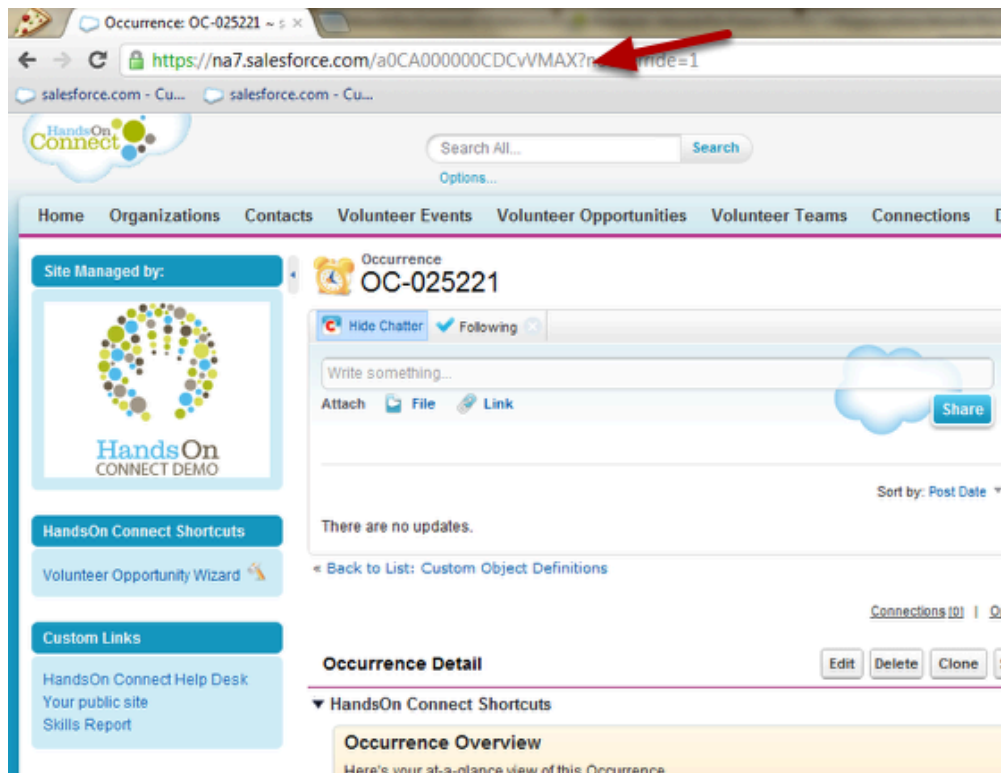
	A	B	C	D	E	F
1	Contact	Volunteer Opportunity	Occurrence	Status	Attendance Status	Role
2	003A000000n06T2			Confirmed	Please Verify	Volunteer
3	003A000000n06T3			Confirmed	Please Verify	Volunteer
4	003A000000pBn9d			Confirmed	Please Verify	Volunteer
5	003A000000pBn9e			Confirmed	Please Verify	Volunteer
6	003A000000pBnYH			Confirmed	Please Verify	Volunteer
7	003A000000pBncw			Confirmed	Please Verify	Volunteer
8	003A000000pBnV4			Confirmed	Please Verify	Volunteer
9	003A000000pBnWL			Confirmed	Please Verify	Volunteer
10	003A000000pBnXA			Confirmed	Please Verify	Volunteer

Create a new spreadsheet with the following 6 columns: Contact, Volunteer Opportunity, Occurrence, Status, Attendance Status, and Role. Copy Contact ID from the exported report into the Contact column. Status should be Confirmed. Attendance Status should be whatever is appropriate, most likely Please Verify. Role should be either Volunteer or Volunteer Leader.

Adding the Volunteer Opportunity ID to the sheet.

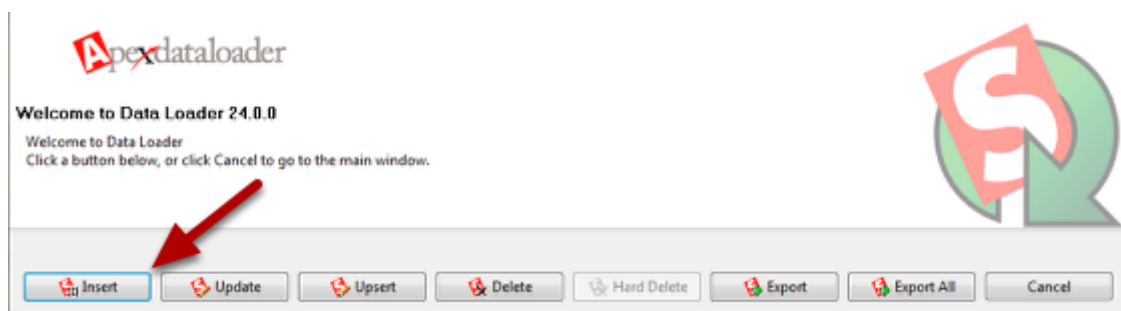
Log into Salesforce and go to the Volunteer Opportunity you wish to connect the Contacts to. The Volunteer Opportunity ID is the last 15 characters of the URL address, up to but not including the slash. Copy that string into the Volunteer Opportunity column on your spreadsheet.

Getting the Occurrence ID in the sheet.



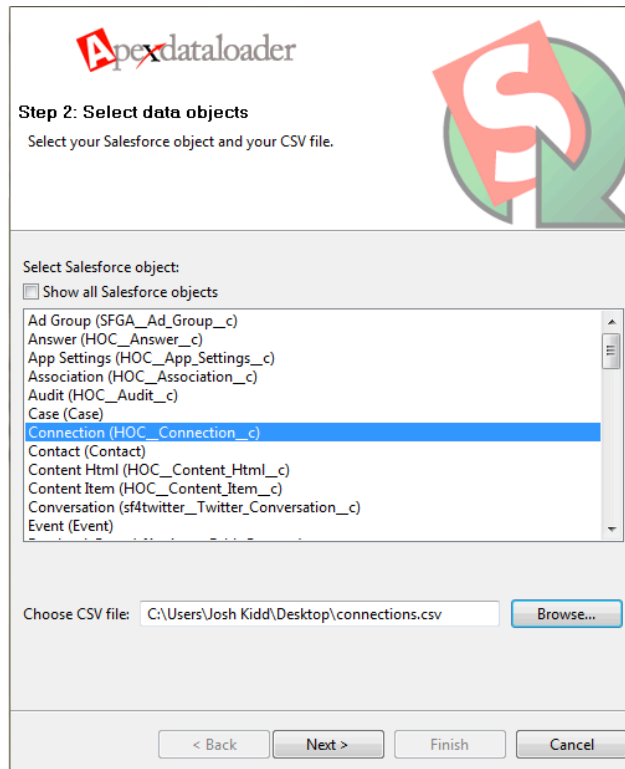
Now go to the Occurrence of that Volunteer Opportunity that you wish to connect the Contacts to. In this case, the Occurrence ID is the 18 character string between the slash and the question mark. Copy that string and paste it into your spreadsheet. Then, save your spreadsheet in CSV format.

Open the Apex Data Loader and Insert Records



Open your Apex Data Loader and press the insert button. For the first Data Loader operation, you will be asked to log in. Enter your Salesforce Username and Password. REMEMBER TO APPEND YOUR SECURITY TOKEN TO THE END OF THE PASSWORD. Click Login, then click Next.

Select the object and file



Apexdataloader

Step 2: Select data objects
Select your Salesforce object and your CSV file.

Select Salesforce object:

☐ Show all Salesforce objects

- Ad Group (SFGA_Ad_Group_c)
- Answer (HOC_Answer_c)
- App Settings (HOC_App_Settings_c)
- Association (HOC_Association_c)
- Audit (HOC_Audit_c)
- Case (Case)
- Connection (HOC_Connection_c)**
- Contact (Contact)
- Content Html (HOC_Content_Html_c)
- Content Item (HOC_Content_Item_c)
- Conversation (sf4twitter_Twitter_Conversation_c)
- Event (Event)

Choose CSV file: C:\Users\Josh Kidd\Desktop\connections.csv


< Back Next > Finish Cancel

Select Connection in the Salesforce object list. Then click browse to find the file you just created. Then click Next.

Create the field mapping

Match the Salesforce fields to your columns.

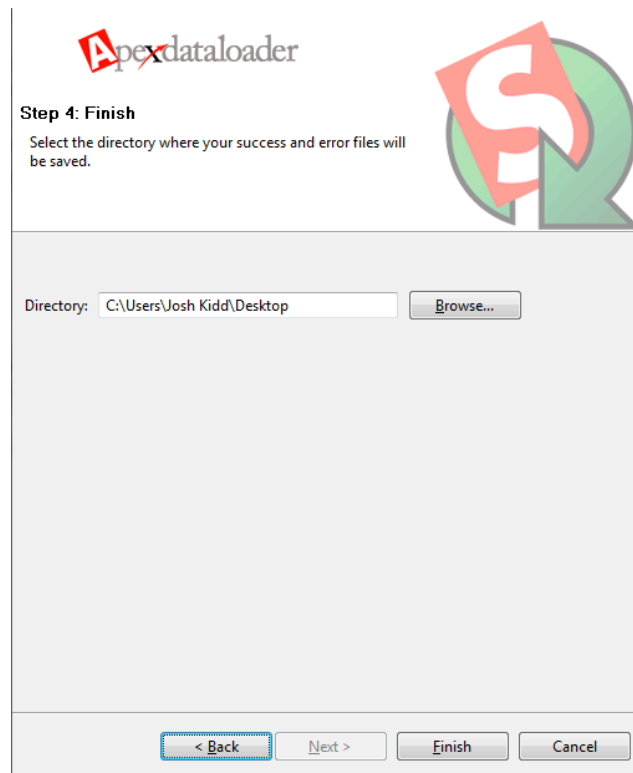
Name	Label	Type
Hidden_Admin_Field__c	Hidden Admin Field	string
HOC__CreationSource__c	CreationSource	string
HOC__Decline_Reason__c	Decline Reason	picklist
HOC__End_Date_Time__c	End Date & Time	datetime
HOC__Feedback__c	Feedback	textarea
HOC__Guest_Hours_Served__c	Old_Guest Hours Served	_double
HOC__Guest_Volunteers__c	Guest Volunteers	_double
HOC__HOC__In__c	HOC__In	string

Drag the Salesforce fields down to the column mapping. To remove a mapping, select a row and click Delete. 

File Column Header	Name
Attendance Status	HOC__Attendance_Status__c
Contact	HOC__Contact__c
Occurrence	HOC__Occurrence__c
Role	HOC__Role__c
Status	HOC__Status__c
Volunteer Opportunity	HOC__Volunteer_Opportunity__c

On the Mapping screen press "Create or Edit Map." On the screen that pops up, click "Auto-Match Fields to Columns" then click "OK." The window will close and you will be back on the Mapping screen. Click Next.

Select log location



The image shows a software window titled "Apexdataloader" with a large red and green logo on the right. The window is at "Step 4: Finish". Below the title bar, it says "Select the directory where your success and error files will be saved." There is a text field labeled "Directory:" containing the path "C:\Users\Josh Kidd\Desktop". To the right of the text field is a "Browse..." button. At the bottom of the window, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

On the Finish screen, click Browse and find the directory where you want to store the success and error logs. Then click Finish. Your Connections should then be loaded into HandsOn Connect.

Importing Volunteer Opportunities via the Data Loader


Do you have many Volunteer Opportunities that you would like to get into your HOC system but you don't want to use the Volunteer Opportunity Wizard? The Data Loader (or similar tool) would be a great choice for getting that done. This is considered advanced data management.

Access the Data Mapping Table for preparing your data.

The Master field list will list all of the fields in each object and give the picklist values, help tips and notes. By using the Occurrences tab within the Data Mapping table, you will be able to prepare the file for import. [Click here to access the Data Tables page.](#)

Data Table Templates for HandsOn Connect

Follow0

**Art Ordoqui**
January 06, 2011 19:13

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⚙

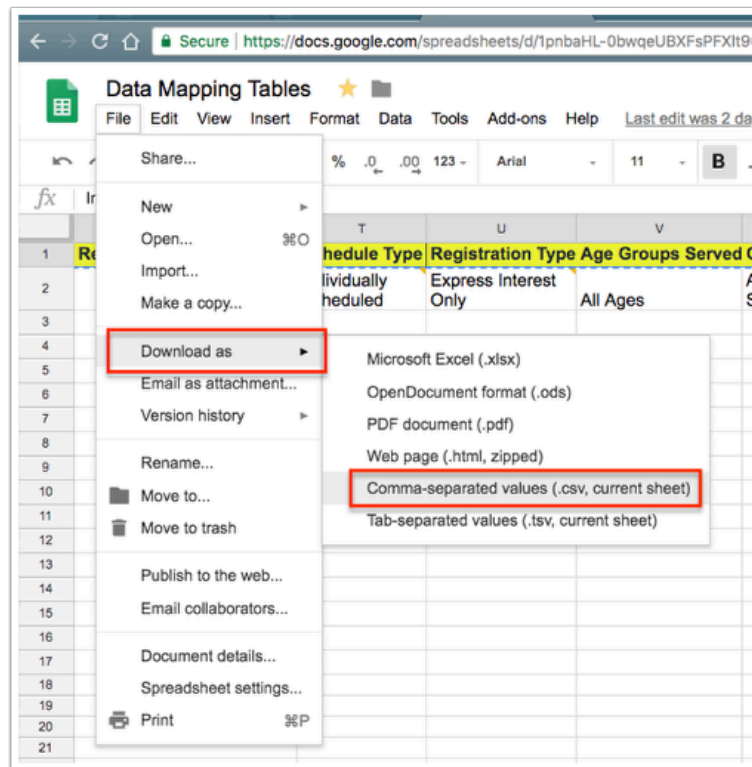
Here are the links to the Data tables to be used for data migrations.

These files are updated regularly as changes are made to the Field List. In addition to the tables in this post, clients will also need to reference the **Master Field List** to see the picklist values, help tips, and notes for these fields.

When you open the table below, go to File and select "Download as" and select the "CSV (Current Sheet)" and save it to your local system before you begin to populate the tables. You will find a different sheet for each object.

- **Full Set for Data Mapping** ←

Go to the Volunteer Opportunity tab and click on "Download As" and choose csv



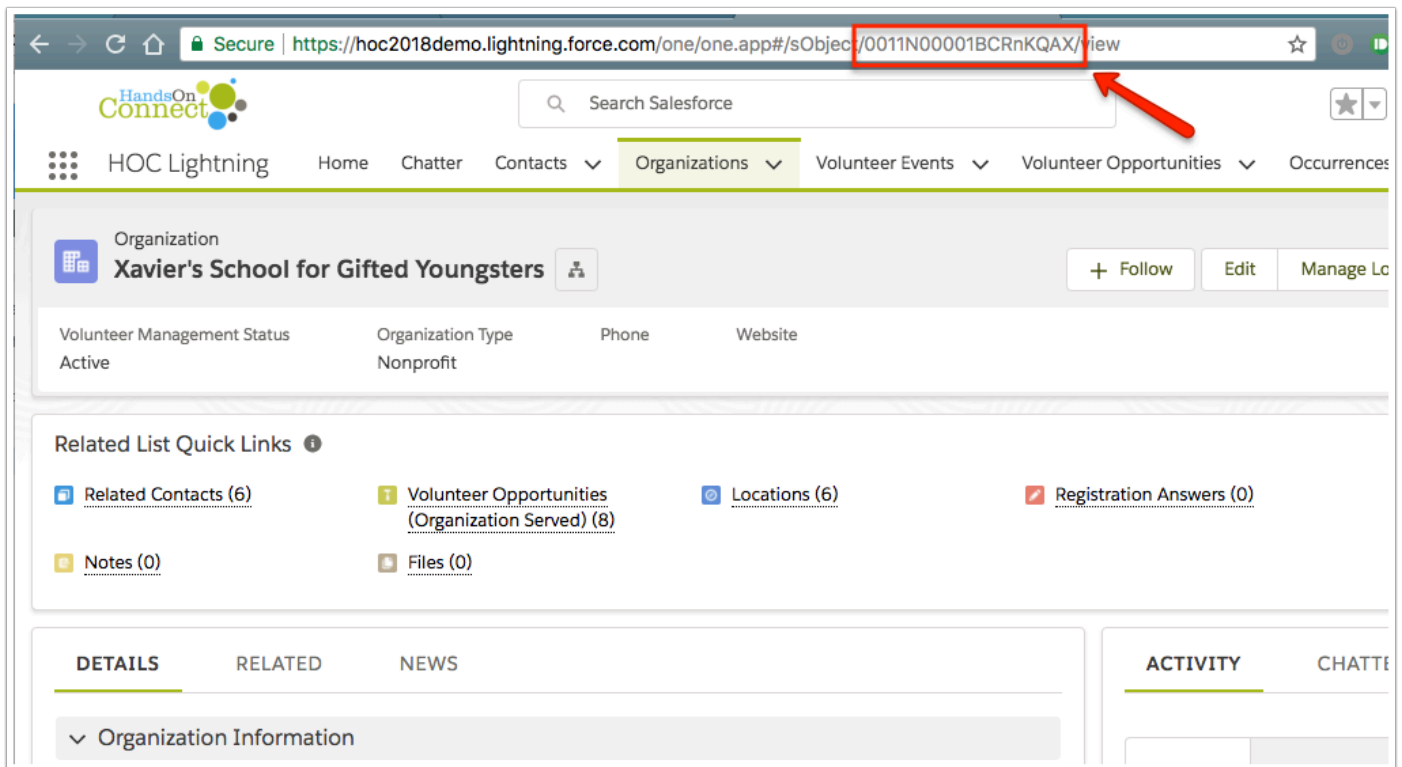
💡 **Keep in mind:** Individually Scheduled Volunteer Opportunities can only have ONE occurrence which is auto-created during this process, so for any Date & Time Specific Volunteer Opportunities, you **MUST also create occurrences**. If you need to import Occurrences as part of this process, please [visit this post on Importing Occurrences](#). You can also create occurrences manually within Salesforce.

Prepare Your Data

To add Volunteer Opportunities, you will need some information from your system before you begin to create your data file. You will need to know your:

- Managing Organization ID
- Organization Served ID
- Hosting Organization ID
- Volunteer Coordinator ID
- Location ID

You can find the ID from the address bar for each record. This ID will either be a 15- or 18-digit case-sensitive value.



Create your Import File

Remember, much of the data at the Volunteer Opportunity level is default data and used in the creation of occurrences. Some of this information once set **CANNOT BE CHANGED** (indicated by *). Also, refer to the master picklist values or custom values within your instance to ensure correct population of information. In addition to explanations, recommended defaults will be listed below.

These are the **REQUIRED** fields in order to have usable Volunteer Opportunities

- **Import ID** = any unique value you would like to assign to this opportunity in order to more easily match for importing Occurrences
- **Volunteer Opportunity Name** = Name of the Volunteer Opportunity
- **Managed By** = either Affiliate (you) or Partner (done through the portal)
- **Managing Organization*** = ID for the Organization that will be getting notifications. If you select "Managed by Affiliate", this will be the ID of YOUR Organization (the HOC Customer record)
- **Hosting Organization*** = ID for the HOC Customer (your organization)
- **Organization Served*** = ID for the Organization that will benefit from this Volunteer Opportunity. Locations should be 'owned' by this Organization
- **Default Location** = ID for the Location
- **Description** = can be plain text or HTML
- **Start Date** = formatted mm/dd/yyyy

- **End Date** = formatted mm/dd/yyyy - *must* be after the start date
- **Opportunity Coordinator** = ID
- **Status** = Active
- **Type** = Project
- **Maximum Attendance** = must be greater than 1
- **Minimum Age (w/ adult)**
- **Minimum Age**
- **Minimum Attendance** = must be greater than 0
- **Primary Impact Area** = Other (choose from your picklist values)
- **Registration Cutoff** = must be in hours
- **Schedule Type*** = either Individually Scheduled or Date & Time Specific
- **Registration Type*** = Sign-up or Express Interest Only
- **Age Groups Served** = All ages
- **Genders Served** = All Genders Served
- **Populations Served** = Other (choose from your picklist values)

* - *these cannot be changed once set*

Once your data has been populated, be sure to save your file as a .csv for import.

Import your Data using the Data Loader

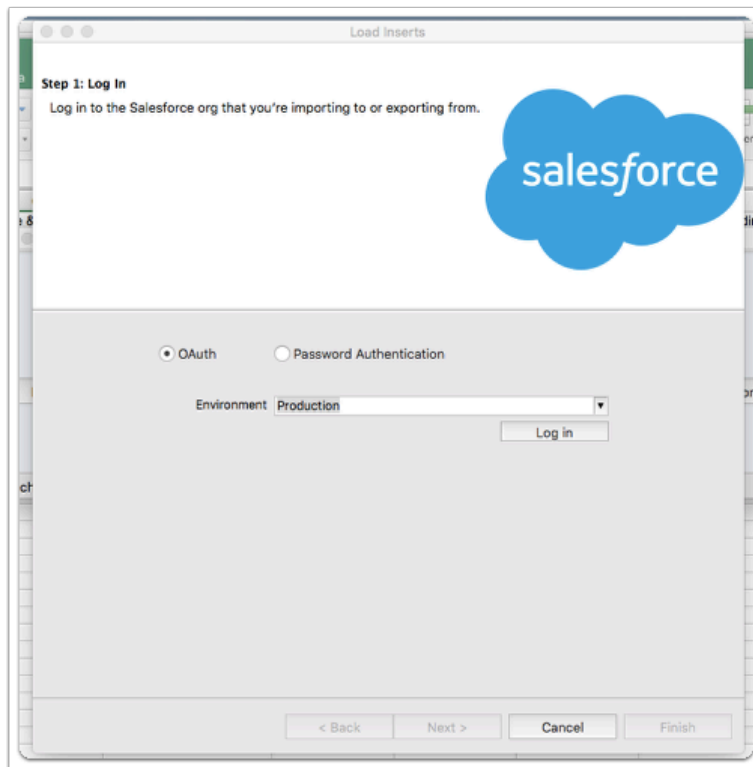
Here is an example of the fields necessary to import into the system. Save this file as a CSV, and you will then begin your import.

	G		H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
1	zation	Opportunity Coordinator	Organization Served	Age Groups Served	Default Location	Start Date	End Date	Genders Served	Maximum At	Minimum Ag	Minimum Ag	Minimum At	Populations	Primary Imp	Registration (Registration	Schedule Type	Status	Type
2	Ro6QAH	0031N00001JPcUQAT	0011N00001BCRo6QAH	All Ages	a081N00000Geeh8UAB	01/01/1999	09/01/2018	All Genders Served	50	18	18	1	Families	Other	1	Express Inter	Date & Time Specific	Active	Project
3	Ro6QAH	0031N00001JPcUQAT	0011N00001BCRo6QAH	All Ages	a081N00000Geeh8UAB	01/01/1999	09/01/2018	All Genders Served	50	18	18	1	Families	Senior Servic	1	Express Inter	Date & Time Specific	Active	Project
4	Ro6QAH	0031N00001JPcUQAT	0011N00001BCRo6QAH	All Ages	a081N00000Geeh8UAB	01/01/1999	09/01/2018	All Genders Served	50	18	18	1	Families	Children & Yc	1	Express Inter	Date & Time Specific	Active	Project
5	Ro6QAH	0031N00001JPcUQAT	0011N00001BCRo6QAH	All Ages	a081N00000Geeh8UAB	01/01/1999	09/01/2018	All Genders Served	50	18	18	1	Families	Adult Educat	1	Express Inter	Date & Time Specific	Active	Project
6	Ro6QAH	0031N00001JPcUQAT	0011N00001BCRnKQAX	All Ages	a081N00000Geeh8UAB	01/01/1999	09/01/2018	All Genders Served	50	18	18	1	Families	Animals	1	Express Inter	Date & Time Specific	Active	Project

H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
Organization Served	Age Groups Served	Default Location	Start Date	End Date	Genders Served	Maximum At	Minimum Ag	Minimum Ag	Minimum At	Populations	Primary Imp	Registration (Registration	Schedule Type	Status	Type
0011N00001BCRo6QAH	All Ages	a081N00000Geeh8UAB	01/01/1999	09/01/2018	All Genders Served	50	18	18	1	Families	Other	1	Express Inter	Date & Time Specific	Active	Project
0011N00001BCRo6QAH	All Ages	a081N00000Geeh8UAB	01/01/1999	09/01/2018	All Genders Served	50	18	18	1	Families	Senior Servic	1	Express Inter	Date & Time Specific	Active	Project
0011N00001BCRo6QAH	All Ages	a081N00000Geeh8UAB	01/01/1999	09/01/2018	All Genders Served	50	18	18	1	Families	Children & Yc	1	Express Inter	Date & Time Specific	Active	Project
0011N00001BCRo6QAH	All Ages	a081N00000Geeh8UAB	01/01/1999	09/01/2018	All Genders Served	50	18	18	1	Families	Adult Educat	1	Express Inter	Date & Time Specific	Active	Project


Open the Data Loader

Click on either "Insert" and then proceed to login to your system. Insert will always create new, while Upsert will either create new or update existing (and match on any externally available ID such as the Import ID or the Salesforce ID).



Load Inserts

Step 1: Log In
Log in to the Salesforce org that you're importing to or exporting from.



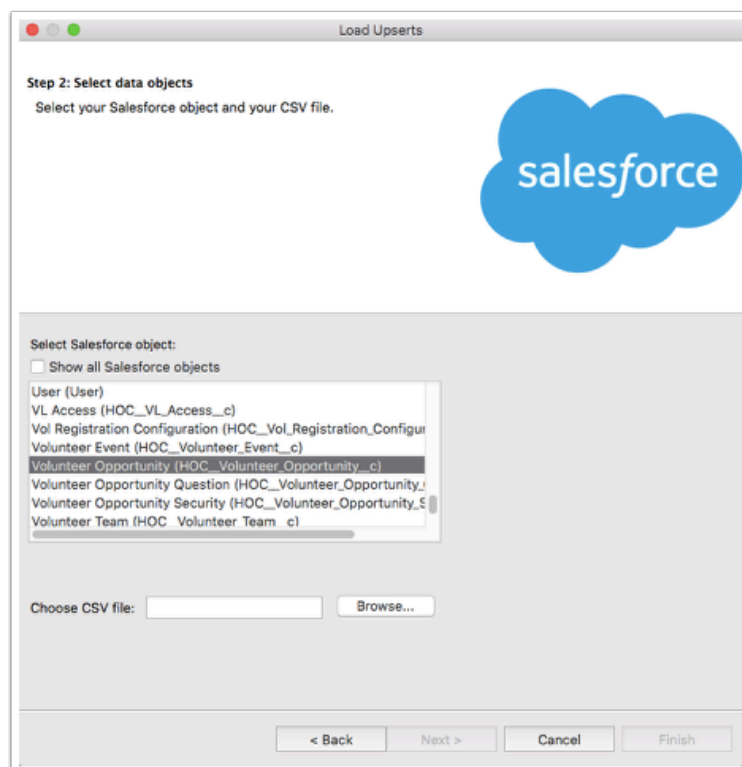
☒ OAuth ☐ Password Authentication

Environment: Production

Log in


< Back Next > Cancel Finish

Link to the Volunteer Opportunity Object



Load Upserts

Step 2: Select data objects
Select your Salesforce object and your CSV file.



Select Salesforce object:

☐ Show all Salesforce objects

- User (User)
- VL Access (HOC_VL_Access__c)
- Vol Registration Configuration (HOC_Vol_Registration_Configuration__c)
- Volunteer Event (HOC_Volunteer_Event__c)
- Volunteer Opportunity (HOC_Volunteer_Opportunity__c)**
- Volunteer Opportunity Question (HOC_Volunteer_Opportunity_Question__c)
- Volunteer Opportunity Security (HOC_Volunteer_Opportunity_Security__c)
- Volunteer Team (HOC_Volunteer_Team__c)

Choose CSV file: Browse...


< Back Next > Cancel Finish

💡 If at a later time you decide you want to update these (or any) Volunteer Opportunities and you chose Upsert rather than Insert, you would then be prompted to match on an ID field. Since you're including the import ID, you would then select HOC__Volunteer_Opportunity__c. You must have the Import ID in your file or SF ID in your file to do an Upsert. If you chose "Update" you MUST use the Salesforce ID to make changes.

Map your Fields

Click on "Create or Edit a Map." The mapping dialog will pop up. You can click on "Auto-Match Fields to Columns" or click and drage the fields from the top to the bottom section if you would prefer (some may not map). If you auto-match, you still should verify that the fields were matched appropriately. Click "OK" once all fields necessary have been matched. Then click on "Next."

HOC__Managing_Individual__c	Managing Individual	reference
HOC__Maximum_Age__c	Maximum Age	double
HOC__Maximum_Waitlist__c	Maximum Waitlist	double
HOC__Minor_Waiver_on_File_Required__c	Minor Waiver on File Required	boolean
HOC__National_Community_Impact_Goals__c	National Impact Goals	picklist
HOC__National_Service_Events__c	National Service Events	picklist
HOC__Opportunity_Approval_Manager_Email__c	Opportunity Approval Manager Email	email
HOC__Opportunity_Characteristics__c	Opportunity Characteristics	multipicklist
HOC__Organization_Served_URL__c	Organization Served URL	url
HOC__Orientation_Required__c	Orientation Required	boolean
HOC__OwnerIdV2__c	OwnerIdV2	reference
HOC__Partner_Staff_Email__c	Partner Staff Email	email

Drag the Salesforce fields down to the column mapping. To remove a mapping, select a row and click Delete. 

File Column Header	Name
Age Groups Served	HOC__Age_Groups_Served__c
Default Location	HOC__Default_Location__c
Description	HOC__Description__c
End Date	HOC__End_Date__c
Genders Served	HOC__Genders_Served__c
Hosting Organization	HOC__Hosting_Organization__c
Import ID	HOC__Import_ID__c
Managed By	HOC__Managed_By__c
Managing Organization	HOC__Managing_Organization__c
Maximum Attendance	HOC__Maximum_Attendance__c

Minimum Age (w/ adult)	HOC_Minimum_Age_w_adult__c	
Minimum Age (w/o adult)	HOC_Minimum_Age_w_o_adult__c	
Minimum Attendance	HOC_Minimum_Attendance__c	
Opportunity Coordinator	HOC_Opportunity_Coordinator__c	
Organization Served	HOC_Organization_Served__c	
Populations Served	HOC_Populations_Served__c	
Primary Impact Area	HOC_Primary_Impact_Area__c	
Registration Cutoff (hours)	HOC_Registration_Deadline__c	
Registration Type	HOC_Registration_Type__c	
Requires Invitation From	HOC_Requires_Invitation_From__c	
Schedule Type	HOC_Schedule_Type__c	
Skilled Volunteer Required	HOC_Skilled_Volunteer_Required__c	
Start Date	HOC_Start_Date__c	
Status	HOC_Status__c	
Type	HOC_Type__c	
Volunteer Opportunity Name	Name	

OK Save Mapping Cancel

💡 Tip - there are additional fields available on the Volunteer Opportunity object - you may even have custom fields on this object. All of these fields can be mapped in this process if you include them in your data file.

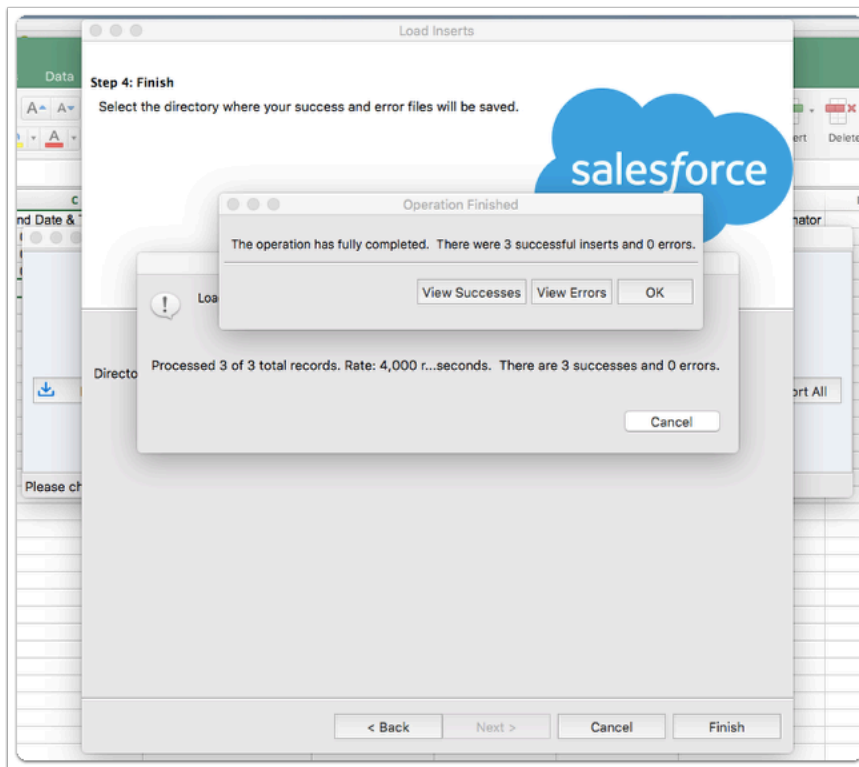
Select where to save the success/failure files

You should create a folder or designate a location for all success and failure files to be saved for your reference after your import.

Complete the Import

Click on "Finish" to begin the import. You will be prompted with a warning stating what you will be doing ("You have chosen to insert new records.") and you must confirm that this is what you wanted to do. As the data is being imported, you will see the successes and failures for the import.


You are then giving the opportunity to see your successes or any errors. Click "OK" to return to the main Data Loader screen.



Check your data

Verify that the data was properly imported into your Salesforce Instance and that for any Individually Scheduled Volunteer Opportunity that was created, an Occurrence was also created.

<div> <div> <div>Search Volunteer Opportunities and more...</div> </div> </div>									
<div> <div>HOC Lightning</div> <div> Home Chatter Contacts Organizations Volunteer Events Volunteer Opportunities Occurrences Recurrences </div> </div>									
<div> <div>Volunteer Opportunities</div> <div>Imported Opportunities</div> <div>16 items • Sorted by Volunteer Opportunity Name • Filtered by Import ID • Updated a few seconds ago</div> </div>									
	VOLUNTEER OPPO...	IMPORT ...	START D...	END DA...	DESCRIPTION	DEFAULT LOCATION	M...	M...	
1	Ales for Alzheimer's	VO000011	8/8/1999	8/7/2019	<p>Ales for Alzheimer'...	1750 Yankee Doodle R...	18	18	
2	Dinner and Shelter Pre...	VO000013	8/8/1999	8/7/2019	Having a plac...	710 Medtronic Parkway	18	18	
3	Graffiti Cleanup	VO000005	8/8/1999	8/7/2019	<p>The U District Part...	710 Medtronic Parkway	18	18	
4	Help Youth Volunteer ...	VO000010	8/8/1999	8/7/2019	Help young volunteers...	120 W Kellogg Blvd	18	18	
5	Host a Holiday Party fo...	VO000017	8/8/1999	8/7/2019	<pre style="white-spac...	690 Jackson Street	18	18	
6	Join the Science Squad	VO000003	8/8/1999	8/7/2019	Help inspire middle-sc...	1750 Yankee Doodle R...	18	18	
7	Operation HEALTHY M...	VO000016	8/8/1999	8/7/2019	Having a plac...	121 West Franklin Ave...	18	18	
8	Package Bulk Food for ...	VO000006	8/8/1999	8/7/2019	Help bag hundreds of ...	Minneapolis Art Instit...	18	18	

 Remember - if you created any Individually Scheduled Opportunities through an Import - you MUST create related Occurrences in order for them to be visible on your public site in order for volunteers to register. To review documentation on importing occurrences, [click here](#)

(Advanced) Data Management

How to Fix: Available Opportunities Found- Showing Incorrect Values

Volunteer Opportunities | Search Results:

112 of 110 Available Opportunities Found


OPPORTUNITY	ORGANIZATION	WHERE	TIME	DISTANCE	FREQ.
Alternative Spring Break	Art in Texas, Inc.	Odessa	04-20-11 09:00PM 1.00 hours	99+ Miles	29 More

Building the Data Table

The first step to batch updating the status for a set of volunteer opportunities and occurrences, is building the report to get us the necessary information to update the record.

For this example, we will create a new Report

Go to Reports and click on the Create New Custom Report button

 **Create New Report** [Help for this Page ?](#)

Select Report Type

Select Category

- Organizations & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contract Reports
- Price Books, Products and Assets
- Administrative Reports
- Other Reports **1**

Select Report Type

- Associations with Organization
- Locations
- Locations with Organization
- Locations with Zip/Postal Code
- Occurrences
- Occurrences with Location
- Occurrences with Recurrence
- Occurrences with Volunteer Opportunity 2**
- Occurrences with Connections and Volunteer Opportunities
- Questions
- Questions with Volunteer Opportunity
- Recurrences

Preview
No preview available.

3
Cancel Create

Once you are able to edit the report, make the following changes:

- 1) Show: All Occurrences
- 2) Date Field: End Date & Time

3) Range: All Time

4) Columns to Add

Volunteer Opportunity: Record ID

Occurrence ID (Salesforce.com ID field)

Volunteer Opportunity: End Date (Not the Volunteer Opportunity:End Date & Time)

Occurrence End Date & Time

5) Since it can be challenging to decipher the Salesforce.com IDs, you can keep the additional columns such as Volunteer Opportunity Name to help you in managing the data. If you need to filter or sort the data, you can also include the Occurrence: Occurrence ID field (OC-#####).

Filters Add

1 Show All occurrences

2 To add filters click the Add button.

3 Date Field End Date & Time Range All Time From To

4 Preview Tabular Format Show Remove All Columns

Volunteer Opportunity: Record ID	Volunteer Opportunity: End Date	Occurrence: ID	End Date & Time
a0NA0000005BqVN	12/30/2011	a0CA0000008OU2k	12/30/2011 12:00 F
a0NA0000002yRwa	12/28/2010	a0CA0000008OaYR	2/10/2011 4:00 F
a0NA0000005CDt8	2/27/2011	a0CA0000008P0au	2/27/2011 6:30 F
a0NA0000005Bumv	2/18/2011	a0CA0000008Ot57	2/18/2011 3:00 F
a0NA0000005BoeA	2/28/2011	a0CA0000008OJpJ	2/28/2011 12:00 F
a0NA0000002yRwa	12/28/2010	a0CA0000008Ozli	2/19/2011 2:00 F
a0NA0000000OeAe	12/31/2013	a0CA0000008OaYH	2/10/2011 12:00 F
a0NA0000000OeAe	12/31/2013	a0CA0000008OzmQ	2/19/2011 12:00 F
a0NA0000000OeAe	12/31/2013	a0CA0000008Oz...	2/14/2011 5:00 F
a0NA0000002yRwa	12/28/2010	a0CA0000008OzRC	2/14/2011 8:00 F
a0NA0000000Of5Y	8/31/2010	a0CA0000003WGAq	8/30/2010 9:00 F
a0NA0000005CGuS	3/5/2011	a0CA0000008P544	3/5/2011 11:00 F

Once all the columns you need are in place, click on Run Report and then Export as .csv

Editing the Exported Table

Open the Exported table and save a copy as a back-up of the data.

This is where it gets tricky.

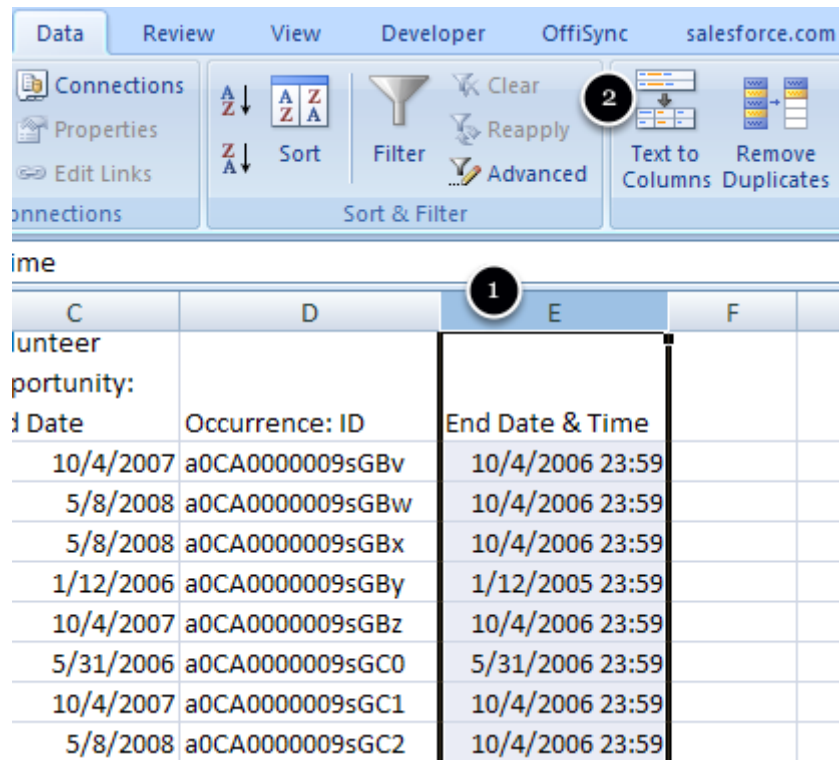
What we need to do is compare the end date of the occurrence with the end date of the volunteer opportunity, but the end date of the occurrence is in date & Time format so we first need to separate the date and time into different cells. This is done by:

1) Highlighting the column where the end date & time for the occurrence is listed. **It is important that the End Date & Time be the furthest column to the right; otherwise, it'll overwrite the date when it is moved into the other columns.**

2) Then select the option for "Text to Columns" usually under the Data menu.

At the bottom of the report, there is a footer, make sure to Delete these five rows from your table prior to importing the data.

Once all the changes have been made, Save the file in a location where you can find it for the import.



C	D	E	F
Volunteer Opportunity:			
Date	Occurrence: ID	End Date & Time	
10/4/2007	a0CA0000009sGBv	10/4/2006 23:59	
5/8/2008	a0CA0000009sGBw	10/4/2006 23:59	
5/8/2008	a0CA0000009sGBx	10/4/2006 23:59	
1/12/2006	a0CA0000009sGBy	1/12/2005 23:59	
10/4/2007	a0CA0000009sGBz	10/4/2006 23:59	
5/31/2006	a0CA0000009sGC0	5/31/2006 23:59	
10/4/2007	a0CA0000009sGC1	10/4/2006 23:59	
5/8/2008	a0CA0000009sGC2	10/4/2006 23:59	

In the Text to Column Wizard that opens, choose the following:

Step 1- Select Delimited. Then click next

Step 2- Select "Space" under the Delimiters options. Then click next.

Step 3- Confirm that the text is going to be split correctly. Then click Finish.

Convert Text to Columns Wizard - Step 1 of 3

The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

1 ☒ Delimited - Characters such as commas or tabs separate each field.
☐ Fixed width - Fields are aligned in columns with spaces between each field.

Preview of selected data:

	End Date & Time
2	10/4/2006 11:59:00 PM
3	10/4/2006 11:59:00 PM
4	10/4/2006 11:59:00 PM
5	1/12/2005 11:59:00 PM

< []

Cancel < Back Next >

Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is displayed in the preview below.

Delimiters

☒ Tab
☐ Semicolon
☐ Comma
☒ Space 2
☐ Other: []

☒ Treat consecutive delimiters as one

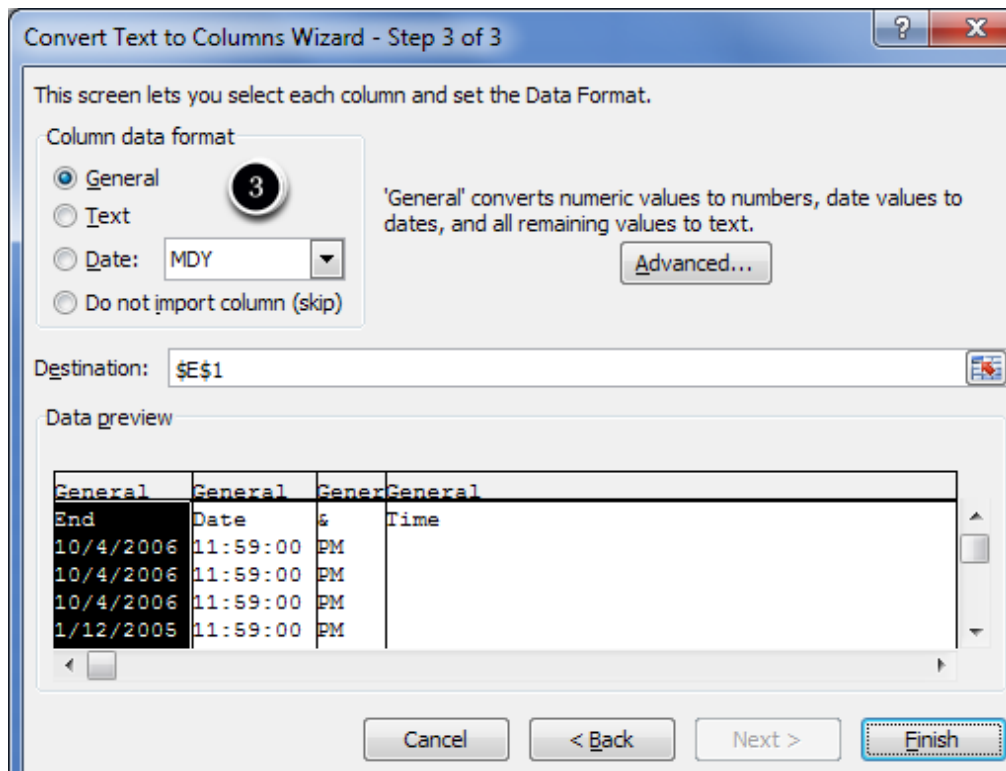
Text qualifier: " []

Data preview

End	Date	&	Time
10/4/2006	11:59:00	PM	
10/4/2006	11:59:00	PM	
10/4/2006	11:59:00	PM	
1/12/2005	11:59:00	PM	

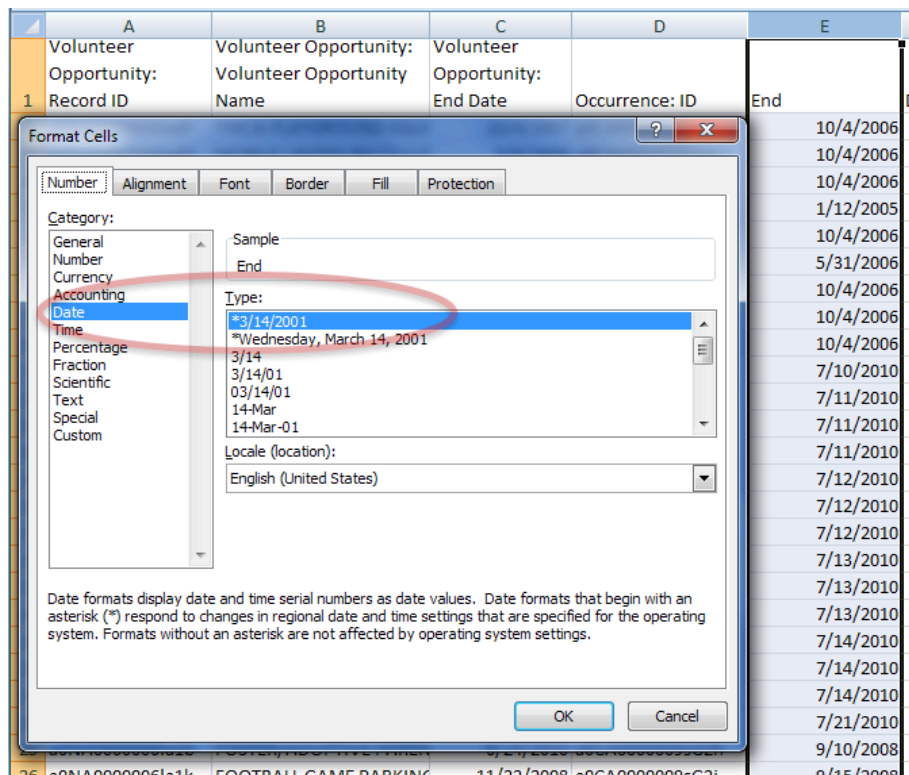
< []

Cancel < Back Next >



Once the Date and Time has been split into separate columns, we need to change the format of the date column (Column E) so that it matches the Volunteer Opportunity End Date (Column C).

To do this, highlight Column E and select the cell format mm/dd/yyyy. (The cell format option is located in different places for different, programs. You should look under the Edit or Formatting menus. Some programs allow you to right click (or sometimes called wrong click) to get a limited menu of options and Format Cells is usually included).



Now that the cells are formatted the same way, we can enter a formula to compare the values.

In Column H, Row 2 (or another empty column, as long as you are in row 2) enter the formula =IF(E2>C2,TRUE,FALSE).

Where E2- represents the cell that has the occurrence end date, and

Where C2- represents the cell that has the Volunteer Opportunity End Date.

(Note: if E2 and C2 are not the right locations of that information, then please update the formula so that it has the correct location for each of those values.)

Once the formula is correct, copy the formula into the remaining cells in the table.

What the formula will return is the rows that are marked TRUE, are where the Occurrence End Date is past the Volunteer Opportunity End Date so those Volunteer Opportunity End Dates need to be updated so that all the occurrences fall within the Volunteer Opportunity Date range.

H2		=IF(E2>C2,TRUE, FALSE)		Formula	
B	C	D	E	H	
Volunteer Opportunity: Volunteer Opportunity Name	End Date	Occurrence: ID	End Date	&	Time
Help teach the kids to read	12/30/2011	a0CA00000008OU2k	12/30/2011	12:00:00 PM	FALSE
Help Kids to Read	12/28/2010	a0CA00000008OaYR	2/10/2011	4:00:00 PM	TRUE
Required servcie	2/27/2011			6:30:00 AM	FALSE
Workflow Test 3	2/13/2011			3:00:00 AM	FALSE
Time After Time	2/28/2011			12:00:00 PM	FALSE
Help Kids to Read	12/28/2010	a0CA00000008Ozli	2/19/2011	2:00:00 PM	TRUE
Arts & Crafts with Kids	12/31/2013			12:00:00 PM	FALSE
Arts & Crafts with Kids	12/31/2013			12:00:00 PM	FALSE
Arts & Crafts with Kids	12/31/2013			5:00:00 PM	FALSE
Help Kids to Read	12/28/2010	a0CA00000008OzRC	2/14/2011	8:00:00 PM	TRUE

Once you have copied the formula into all the rows. Any rows, where the result was FALSE can be removed from your table.

At this point there are a few different options.

1) If there are only a few Volunteer Opportunities in which the Occurrence End Date extends beyond the Volunteer Opportunity End Date you can just use the resulting table as a reference and go into the actual Volunteer Opportunity records and change the End Dates to be inclusive of the Occurrences.

2) If there are a number of these records that are impacted by this, then you can perform a Import Custom Objects update.

To finish preparing the table to update the Volunteer Opportunity End Date, you need to:

a) remove any duplicates for the Volunteer Opportunities. There might be more than one occurrence that is outside of the Volunteer Opportunity Date range, so make sure that you use the occurrence that is the furthest out to set the new Volunteer Opportunity End Date.

b) Update the date in the Volunteer Opportunity End Date column to match (or I recommend 1 day greater than) the Occurrence End Date.

(Excel Tip: you can enter the formula =E2+1 into the C2 cell and it will calculate a new date for you that is one day greater than the Occurrence End Date)

c) When using the Import Custom Objects in Salesforce, the only two columns that you need to map are:

Volunteer Opportunity: Record ID to Salesforce.com ID

Volunteer Opportunity: End Date to End Date.

d) make sure you have deleted the report footer if you hadn't already.

For directions on how to perform a Import Custom Object, [click here](#)

C2		fx =E2+1		Formula		G		H	
B	C	D							
Volunteer Opportunity: Volunteer Opportunity Name	End Date	Occurrence: ID		End	Date	&		Time	
Food Sorting for AIDS Proj	1/1/2013	a0CA0000001HbiU		12/31/2012	12:00:00	PM		FALSE	
Sports Intro	1/21/2011	a0CA00000007hf			0:00	PM		TRUE	
Birthday blast	1/8/2011	a0CA00000007S			1:00	AM		TRUE	
birthday blast again	1/28/2011	a0CA00000007TTBd		2/25/2011	8:33:00	AM		TRUE	
Help Kids to Read	12/28/2010	a0CA00000008OaYR		2/10/2011	4:00:00	PM		TRUE	
Help Kids to Read	12/28/2010	a0CA00000008OaYR		2/19/2011	2:00:00	PM		TRUE	
Help Kids to Read	1				8:00:00	PM		TRUE	
bill deposit-14					6:15:00	AM		TRUE	
bill dopsit					6:29:00	AM		TRUE	
Summer of Service					11:00:00	AM		TRUE	
Alternative Spring Break					11:00:00	AM		TRUE	
Alternative Spring Break	4/15/2011	a0CA00000009w5g8		4/20/2011	10:00:00	PM		TRUE	
AFD Big Daddy Day	5/18/2011	a0CA00000009wTnz		5/19/2011	2:11:00	AM		TRUE	
Brackenridge Park Clean-u	1/16/2011	a0CA00000009wYd1		4/22/2011	2:00:00	PM		TRUE	

New End Date

Make sure that you only
have 1 Volunteer
Opportunity and that it has

Data Table Templates for HandsOn Connect

Here are the links to the Data tables to be used for data migrations.

These files are updated regularly as changes are made to HandsOn Connect. When you open the table below, go to File and select "Download as" and select the "CSV (Current Sheet)" and save it to your local system before you begin to populate the tables. You will find a different sheet for each object.

- [Full Set for Data Mapping](#)

The first tab is a Notes tab to with key and overall information with additional links to helpful documentation. The last two tabs include information on standard dropdown values as well as the master set of fields included in or utilized by HandsOn Connect.

Additional tables for Nonprofit Success Pack Users are included in that FULL SET.

- **Households***
- **Donations**
- **Relationships**

*note - for NPSP users using the **Household Account Model** (and not the Household object), include the Household import ID in the Contact Table and list Households on the Account/Organization tab in order to link multiple contacts to the same Household Account.

In addition to the table here is a tip sheet with notes on Excel shortcuts and checklist to make sure you have the required fields and correct picklists:

[Required Fields and Picklist Checklist](#)

[Tips for creating HandsOn Connect Tables](#)

[Recording of How to Create Tables](#)