Data Management for Salesforce Administrators

HandsOnConnect Cloud Solutions

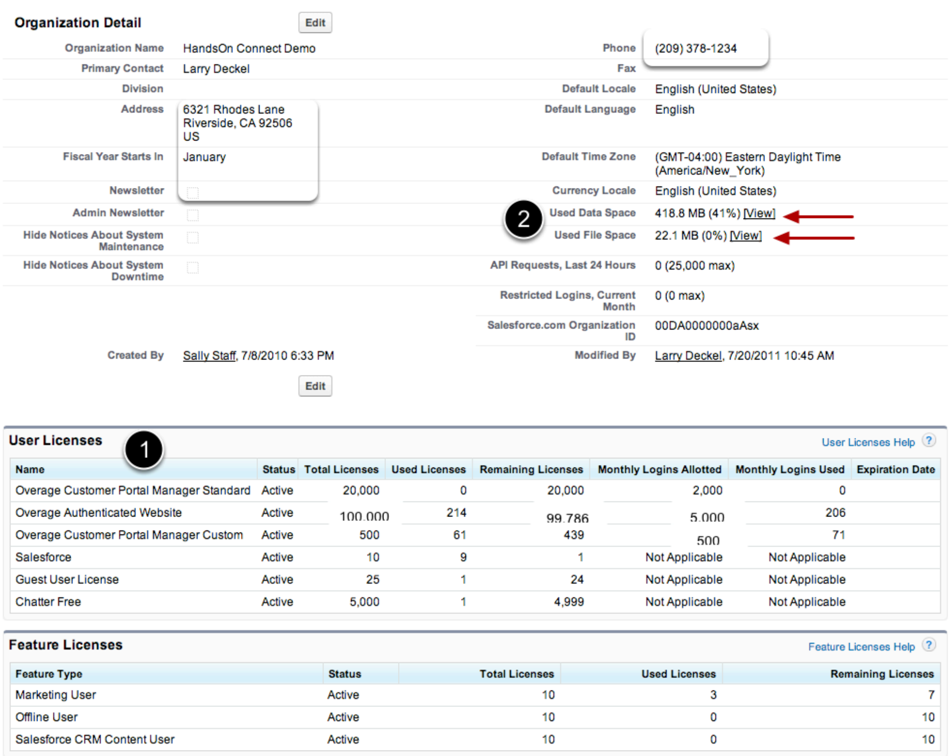
Table of Contents

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 Deckel	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		Currency Locale	English (United States)
Admin Newsletter		Used Data Space	418.8 MB (41%) [View]
Hide Notices About System Maintenance		Used File Space	22.1 MB (0%) [View]
Hide Notices About System Downtime		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 Deckel, 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	15.8 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 Clemons	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%
salim dooma	46 KB	0%
HandsOn Connect Admin 9999	40 KB	0%
Robert Boylan	38 KB	0%
Stefan Skills	38 KB	0%
Paige Van Riper	35 KB	0%
Davis Kirby	31 KB	0%
Zach Spiller	24 KB	0%
Lenny Leader	23 KB	0%

Understanding record IDs

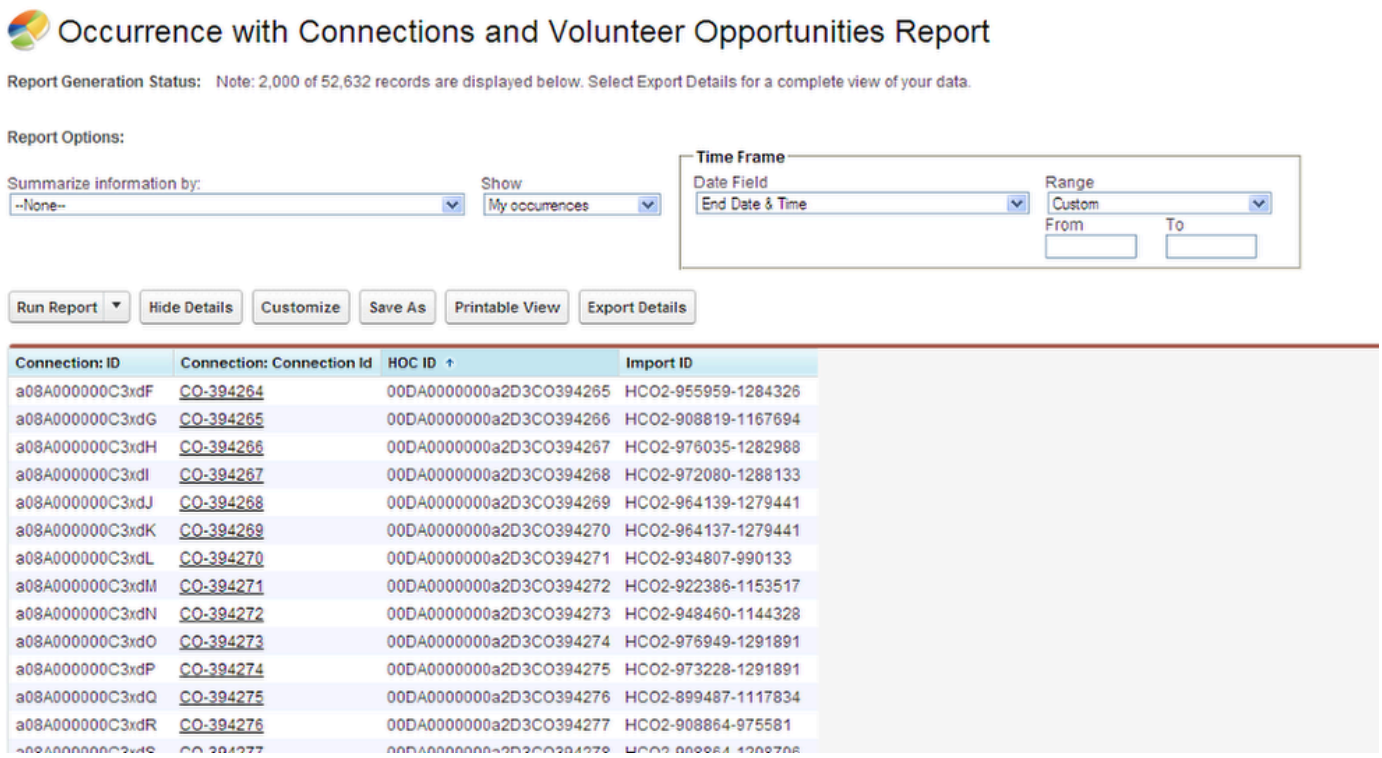
Record IDs serve as a definitive way of of differentiating one record from another.

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 accidently 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!



Connection: ID	Connection: Connection Id	HOC ID ↑	Import ID
a08A000000C3xdF	CO-394264	00DA0000000a2D3CO394265	HCO2-955959-1284326
a08A000000C3xdG	CO-394265	00DA0000000a2D3CO394266	HCO2-908819-1167694
a08A000000C3xdH	CO-394266	00DA0000000a2D3CO394267	HCO2-976035-1282988
a08A000000C3xdI	CO-394267	00DA0000000a2D3CO394268	HCO2-972080-1288133
a08A000000C3xdJ	CO-394268	00DA0000000a2D3CO394269	HCO2-964139-1279441
a08A000000C3xdK	CO-394269	00DA0000000a2D3CO394270	HCO2-964137-1279441
a08A000000C3xdL	CO-394270	00DA0000000a2D3CO394271	HCO2-934807-990133
a08A000000C3xdM	CO-394271	00DA0000000a2D3CO394272	HCO2-922386-1153517
a08A000000C3xdN	CO-394272	00DA0000000a2D3CO394273	HCO2-948460-1144328
a08A000000C3xdO	CO-394273	00DA0000000a2D3CO394274	HCO2-976949-1291891
a08A000000C3xdP	CO-394274	00DA0000000a2D3CO394275	HCO2-973228-1291891
a08A000000C3xdQ	CO-394275	00DA0000000a2D3CO394276	HCO2-899487-1117834
a08A000000C3xdR	CO-394276	00DA0000000a2D3CO394277	HCO2-908864-975581

When we look for the term ID in a connectioins 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")

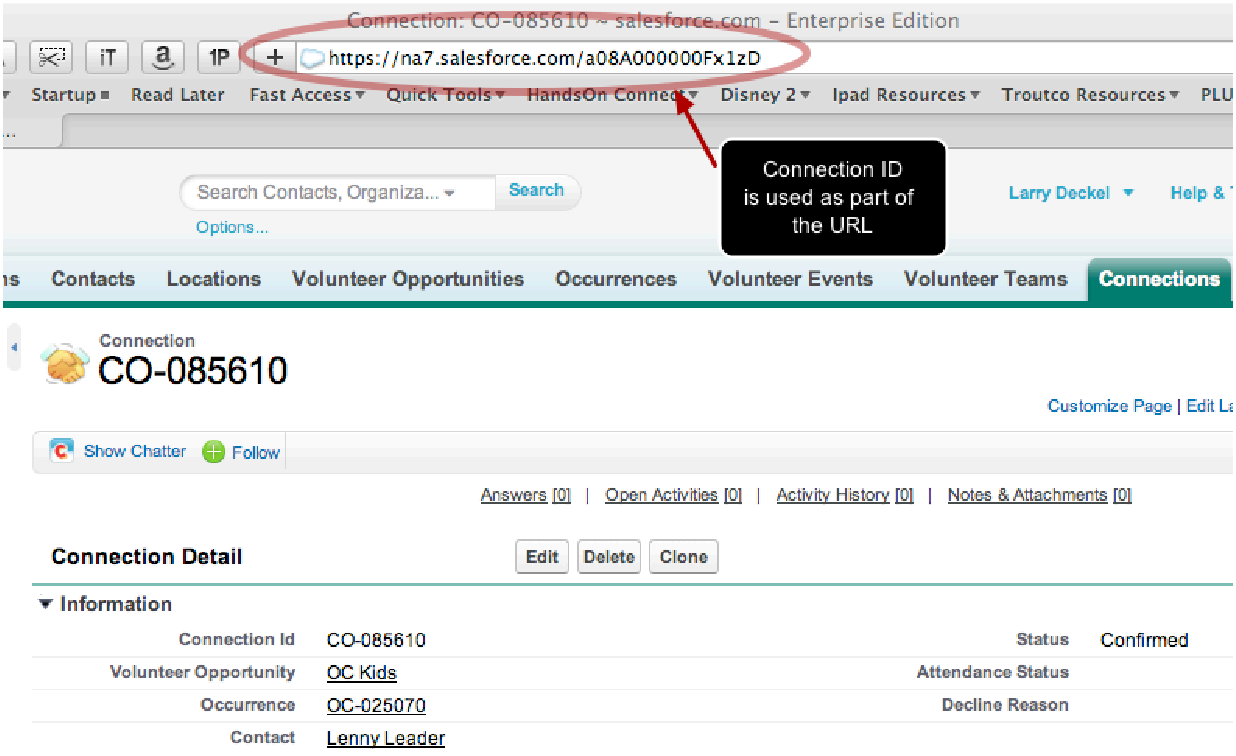
Connection Id	Connection ID	HOC ID
CO-085610	a08A000000Fx1zD	00DA0000000aAsxCO85611
CO-085611	a08A000000Fx1zE	00DA0000000aAsxCO85612
CO-085612	a08A000000Fx1zF	00DA0000000aAsxCO85613
CO-085613	a08A000000Fx1zG	00DA0000000aAsxCO85614
CO-085614	a08A000000Fx2sb	00DA0000000aAsxCO85615
CO-085615	a08A000000FxEtp	00DA0000000aAsxCO85616
CO-085616	a08A000000FxLPN	00DA0000000aAsxCO85617
CO-085617	a08A000000FxLPX	00DA0000000aAsxCO85618
CO-085618	a08A000000FxNur	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 insance of Salesforce, an ID is created.

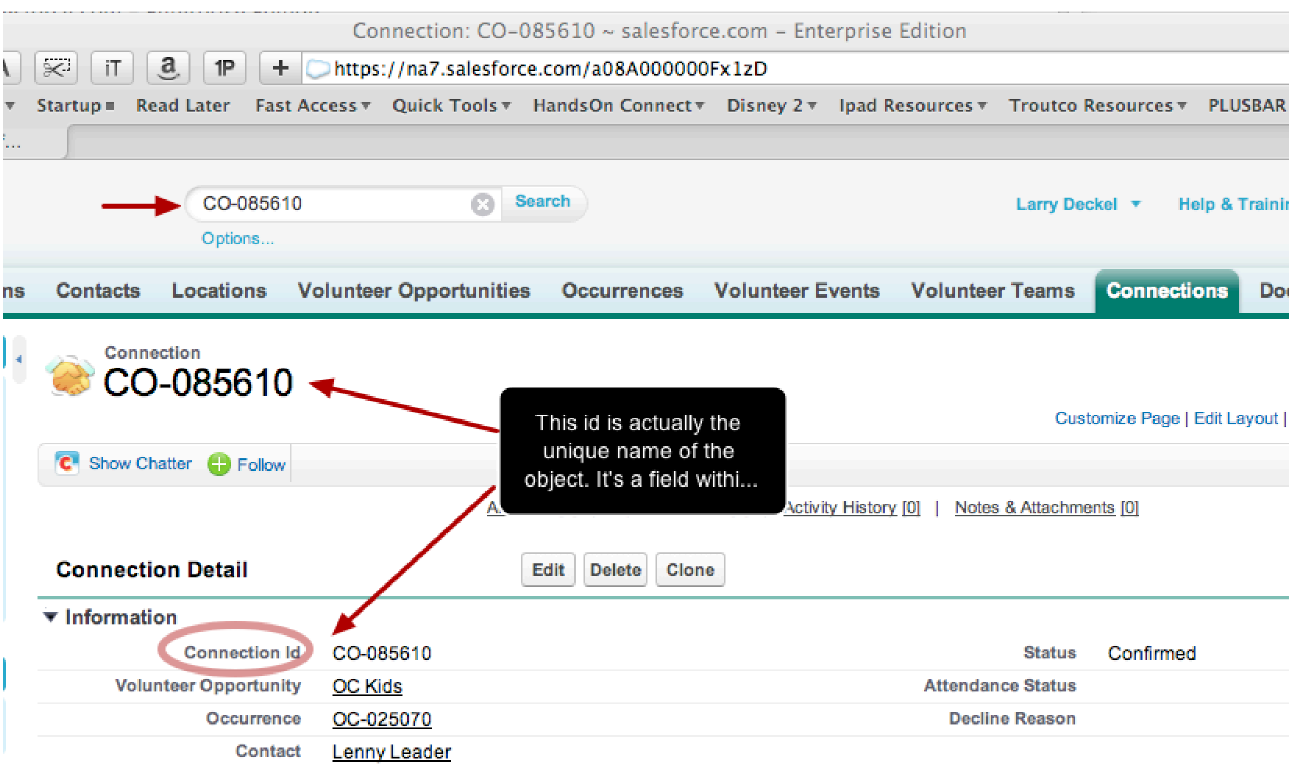
The ID is 15 characters with a combination of numbers and upper and lower case letters. It is case sensitive!

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)



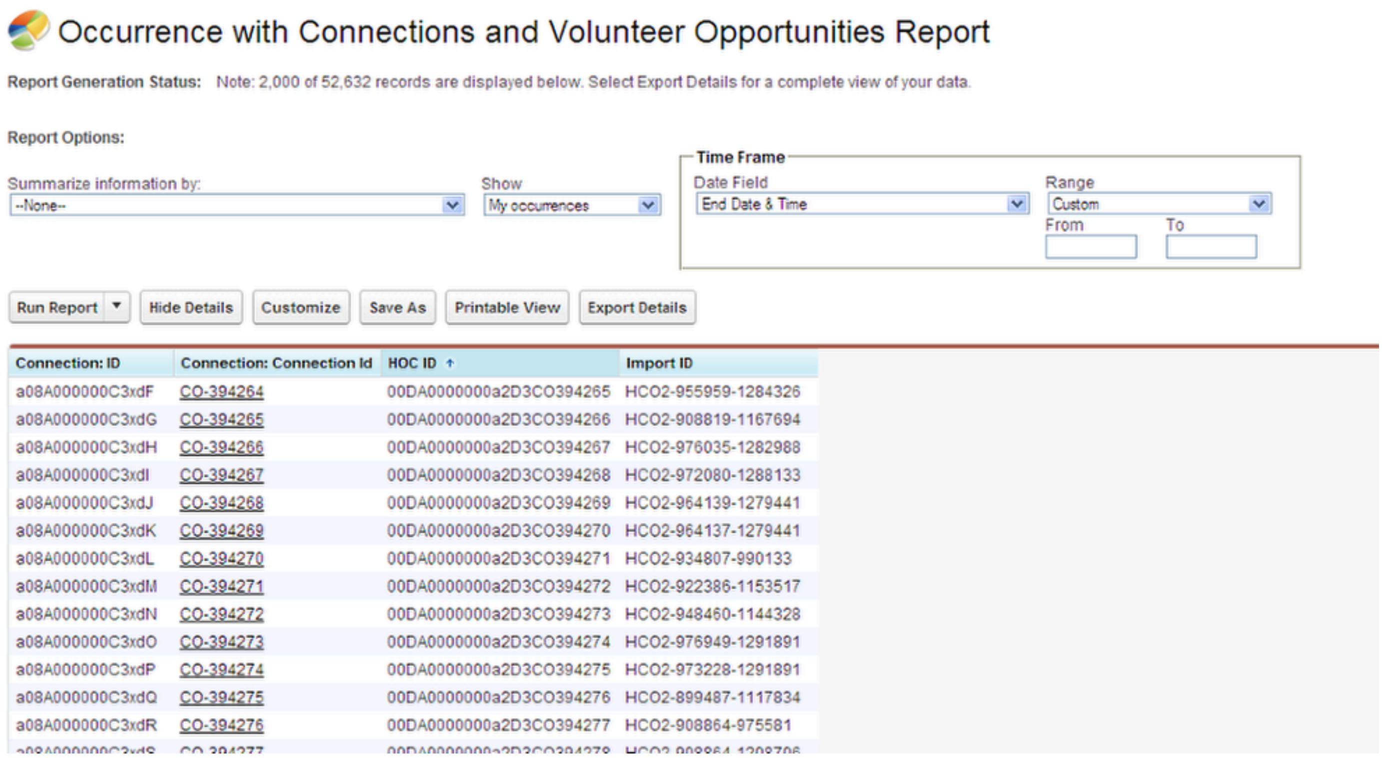
Each record is salesforce must have a Record Name Label.

It can be formated as a text (i.e. Full Name, Tool Name, Account Name), or be an numeric code, that is autonumbered 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



Connection: ID	Connection: Connection Id	HOC ID	Import ID
a08A000000C3xdF	CO-394264	00DA0000000a2D3CO394265	HCO2-955959-1284326
a08A000000C3xdG	CO-394265	00DA0000000a2D3CO394266	HCO2-908819-1167694
a08A000000C3xdH	CO-394266	00DA0000000a2D3CO394267	HCO2-976035-1282988
a08A000000C3xdI	CO-394267	00DA0000000a2D3CO394268	HCO2-972080-1288133
a08A000000C3xdJ	CO-394268	00DA0000000a2D3CO394269	HCO2-964139-1279441
a08A000000C3xdK	CO-394269	00DA0000000a2D3CO394270	HCO2-964137-1279441
a08A000000C3xdL	CO-394270	00DA0000000a2D3CO394271	HCO2-934807-990133
a08A000000C3xdM	CO-394271	00DA0000000a2D3CO394272	HCO2-922386-1153517
a08A000000C3xdN	CO-394272	00DA0000000a2D3CO394273	HCO2-948460-1144328
a08A000000C3xdO	CO-394273	00DA0000000a2D3CO394274	HCO2-976949-1291891
a08A000000C3xdP	CO-394274	00DA0000000a2D3CO394275	HCO2-973228-1291891
a08A000000C3xdQ	CO-394275	00DA0000000a2D3CO394276	HCO2-899487-1117834
a08A000000C3xdR	CO-394276	00DA0000000a2D3CO394277	HCO2-908864-975581

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)

Its 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 autonumbered 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.

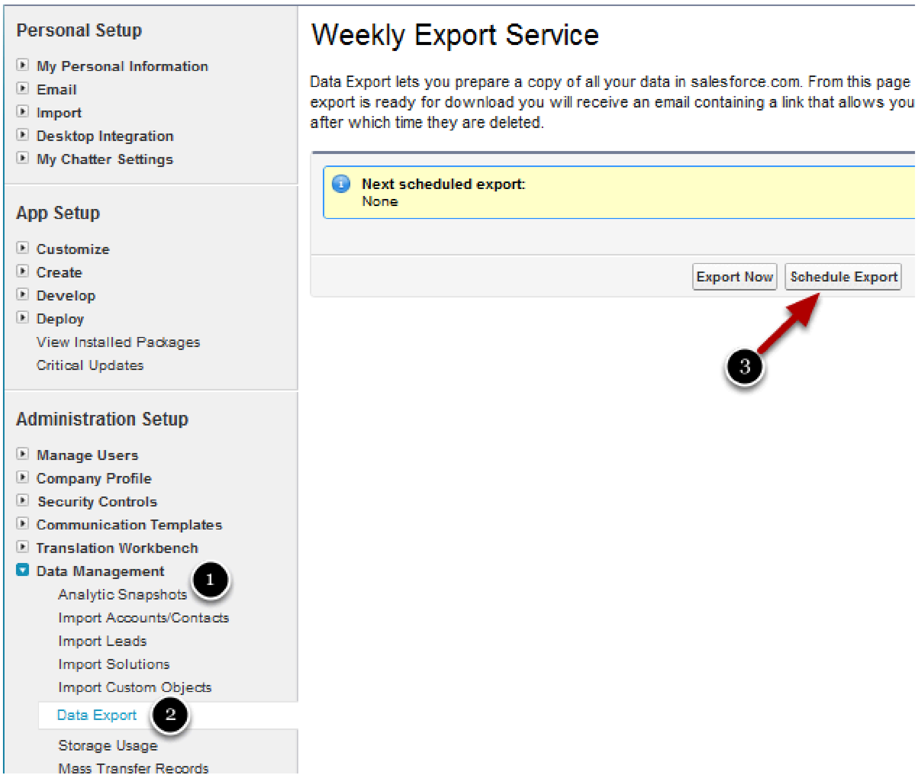
So for data management purposes - the ID we will usually want to use is the "Salesforce ID" (or in the case of a connection record, the **Connection ID.** The one with 15 characters.

Archiving your data - Weekly Export Service

Given that your data is your must 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)

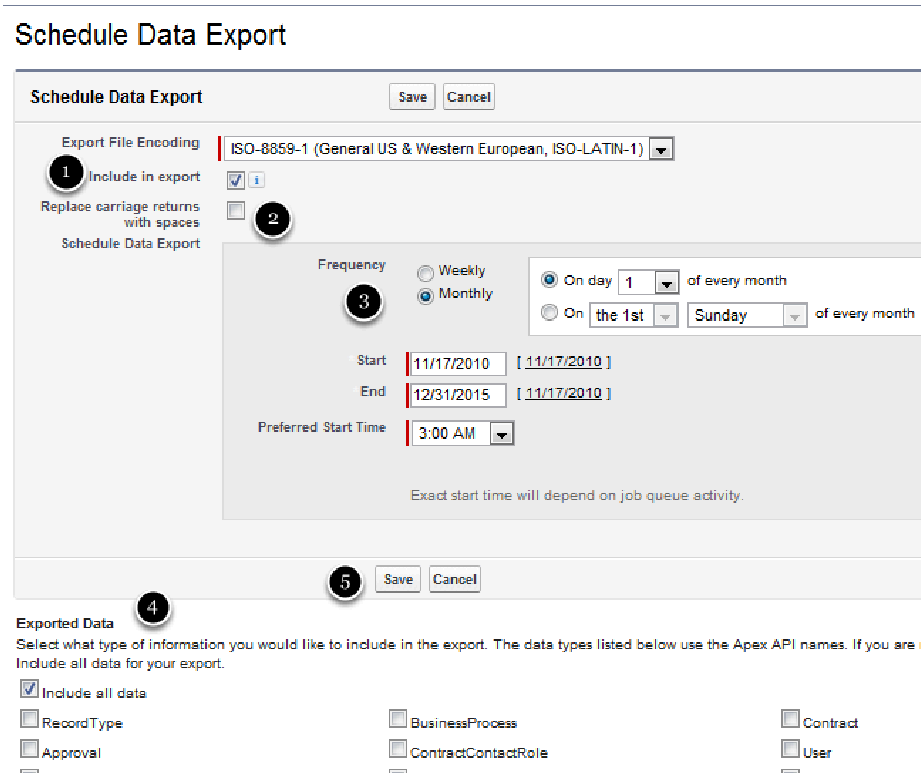


System Administrators can set-up and be notified of automated back-ups performed on the system.

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

Then select "Schedule Export"

Setting the Export Specifications



1) Check the box for “Include in export” this includes documents and attachments in your system.

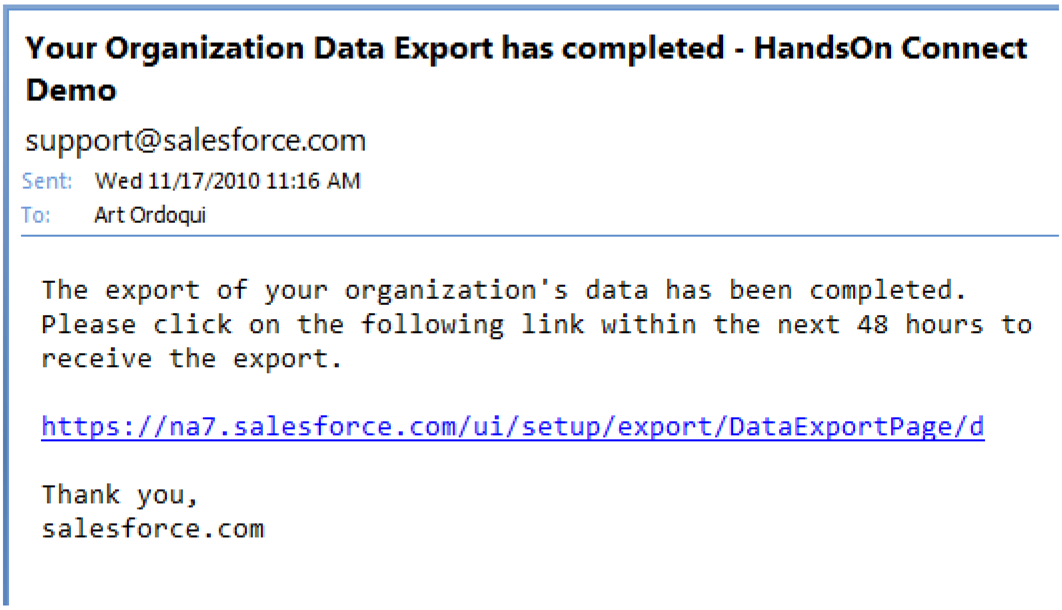
2) Uncheck the box for replacing carriage returns with spaces (optional)

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

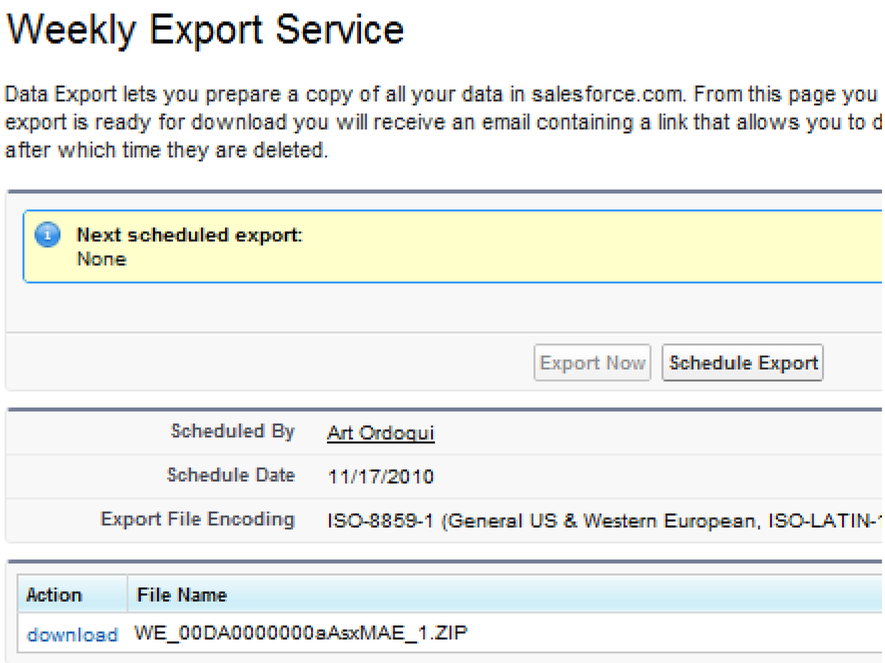
support@salesforce.com
Sent: Wed 11/17/2010 11:16 AM
To: Art Ordoqui

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.



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

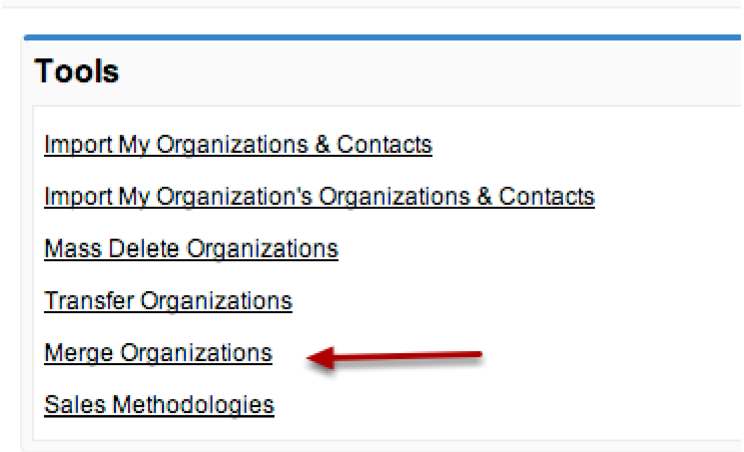
This lesson shows you how to merge duplicate Organizations while maintaining relationships to contacts, volunteer opportunities, and other related records.

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.

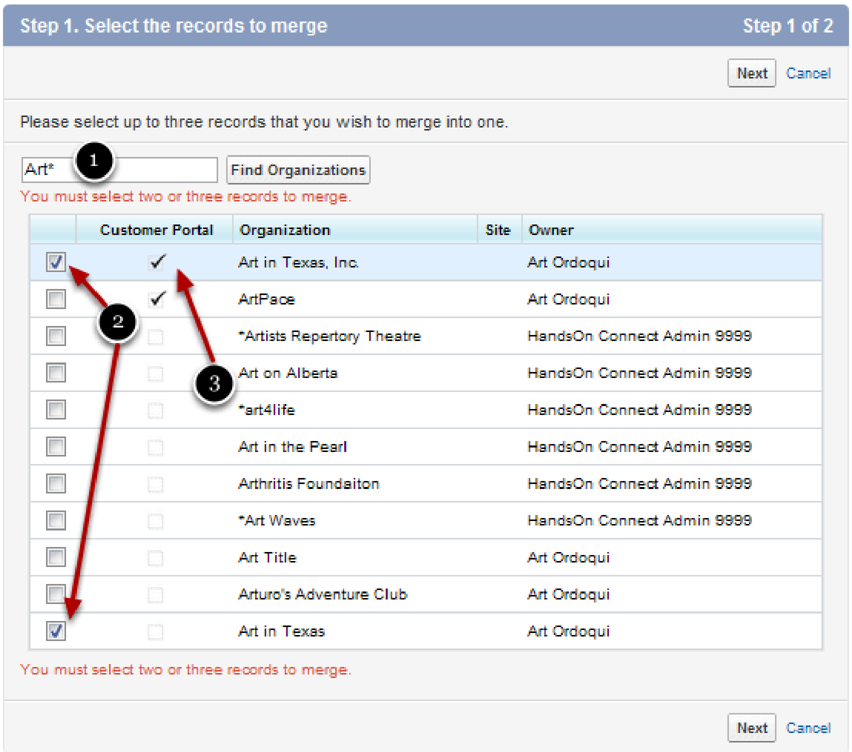
IMPORTANT: If a contact has partner staff profile / portal access in one of the duplicate organizations, you should REMOVE their partner staff license/access BEFORE merging the organizations. You can keep portal users who are related to the MASTER record, but the partner staff access will not transfer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



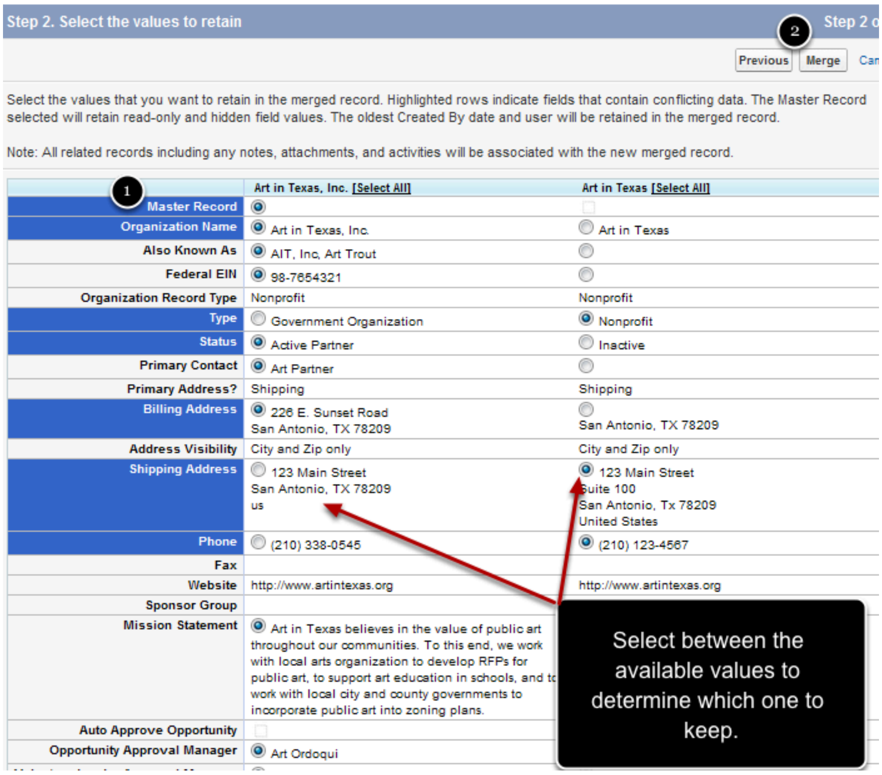
1) Enter the keyword to find the organizations to merge. You can use an * as a wildcard search.

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



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

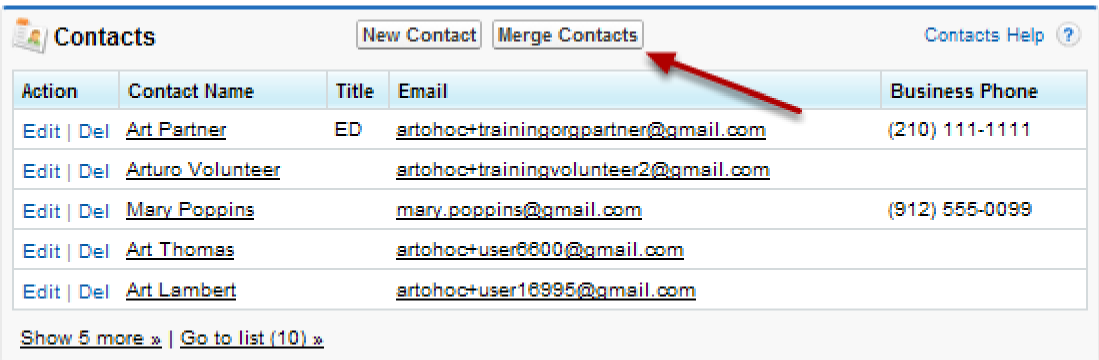
This lesson shows you how to merge duplicate Contacts while maintaining relationships to connections, team members, and other related records.

To start, the Contacts must be associated with the same organization. It is usually easier to have them related to an organization other then 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.

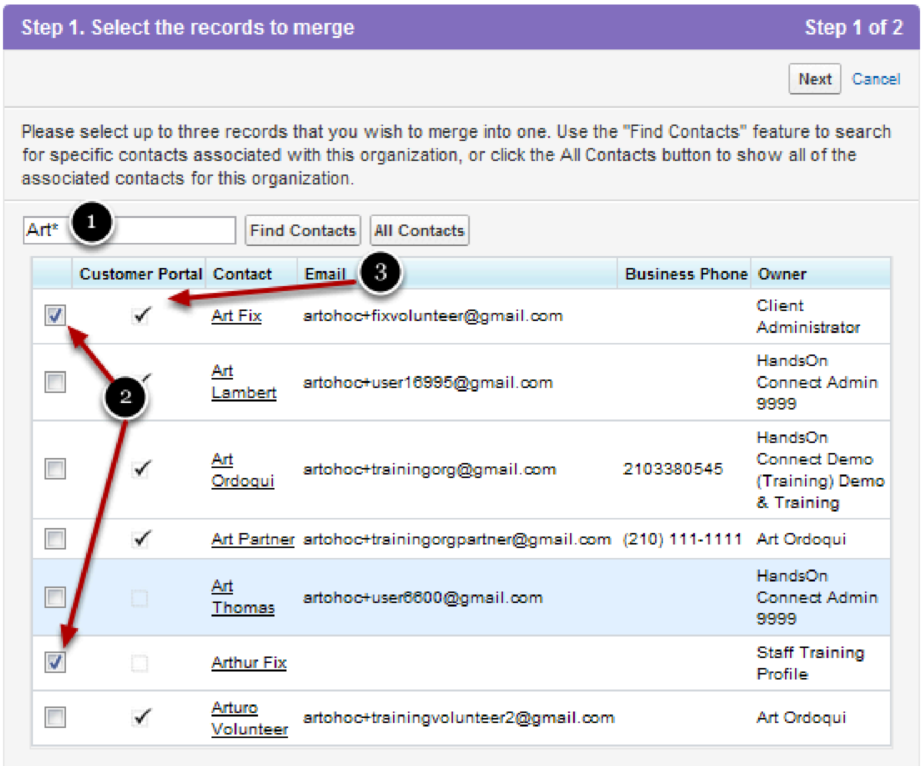
Note: If you want to make sure that all values and notes are preserved, print out the contact's record and list of related items to compare after the merge is complete.

Organization Record



Scroll to the Contacts related list under the organization's detail and click on Merge Contacts

Find Contacts



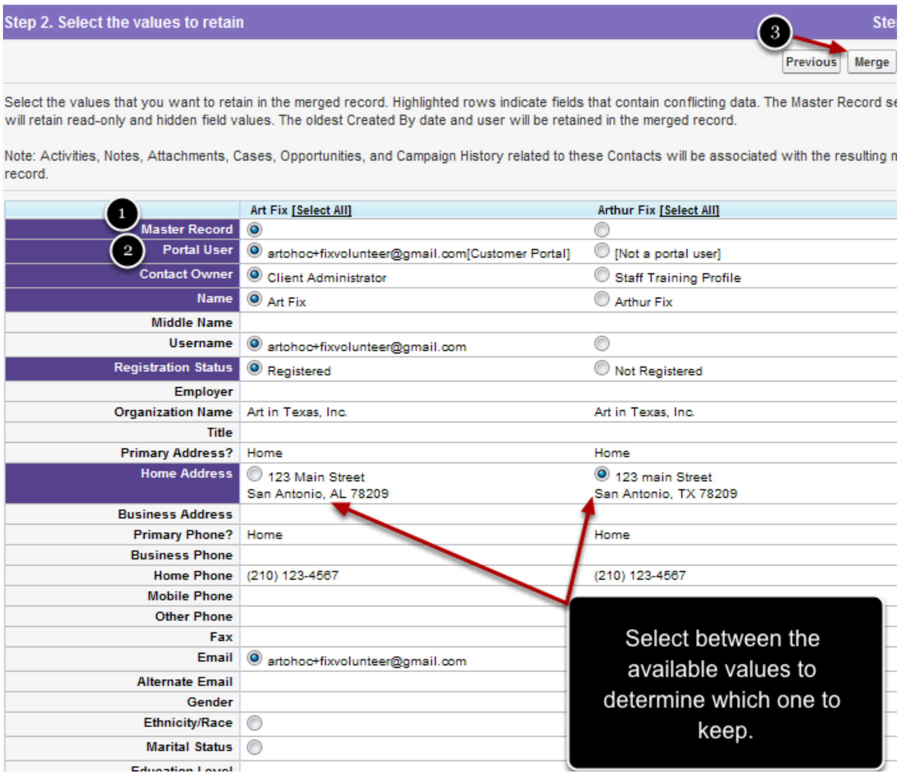
1) Enter the keyword to find the contact to merge. You can use an * as a wildcard search.

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



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.

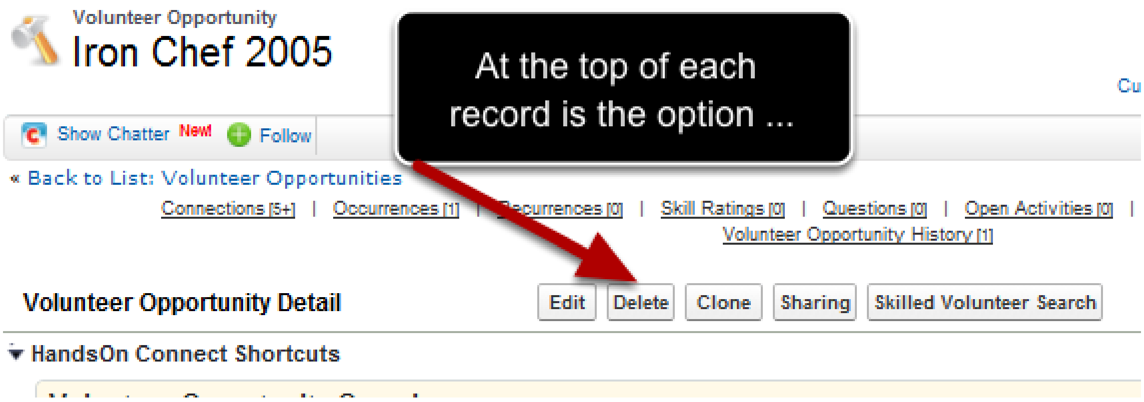
See the next post to understand what can happen if records are deleted!

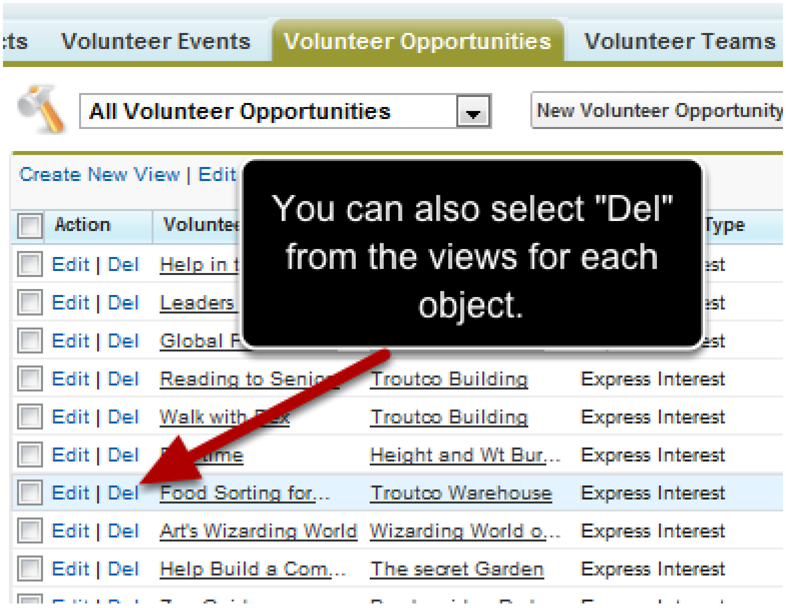
Salesforce does not archive data for you. If you delete it, it will eventually be permanently gone. And if there are related records that required the record you deleted - you will corrupt the other records :-(

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..

<u>DO NOT</u> 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 recyling 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.

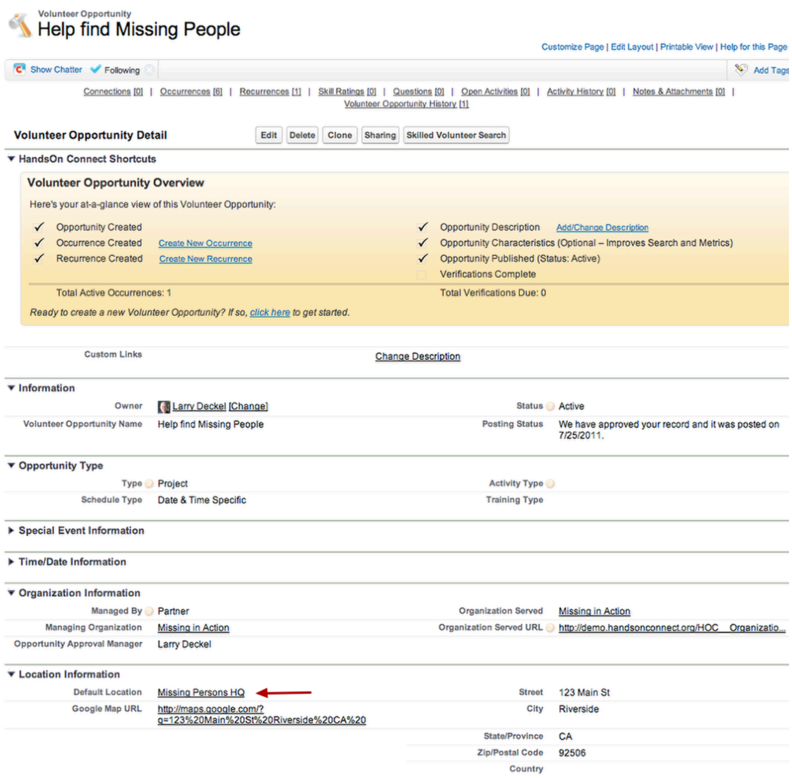
Volunteer Opportunities, Occurrences, locations and connections have lookup fields to other objects. And some of these lookup fields are required fields in another object.

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?

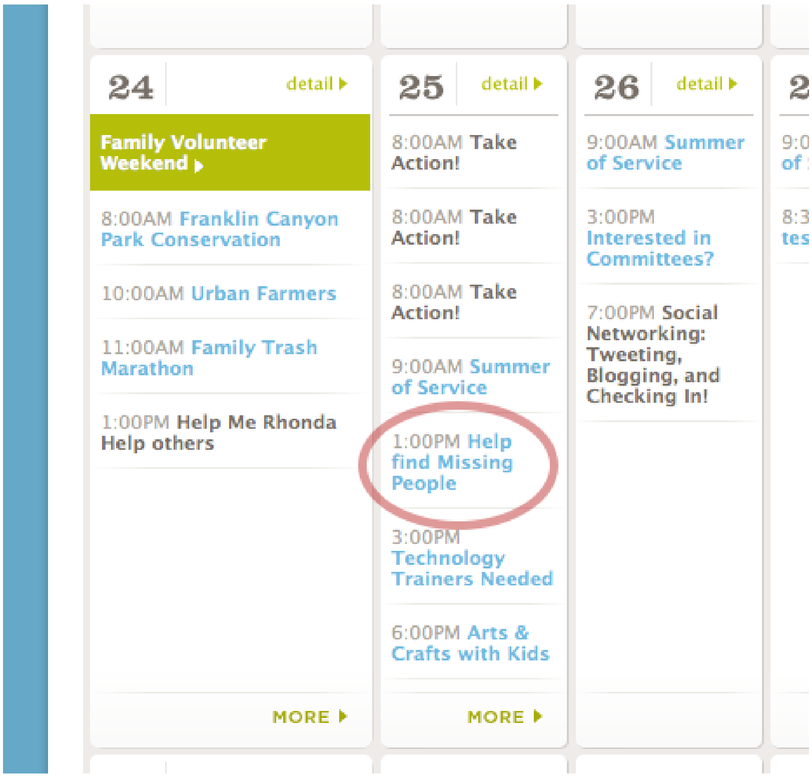
Answer: Bad things happen!

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



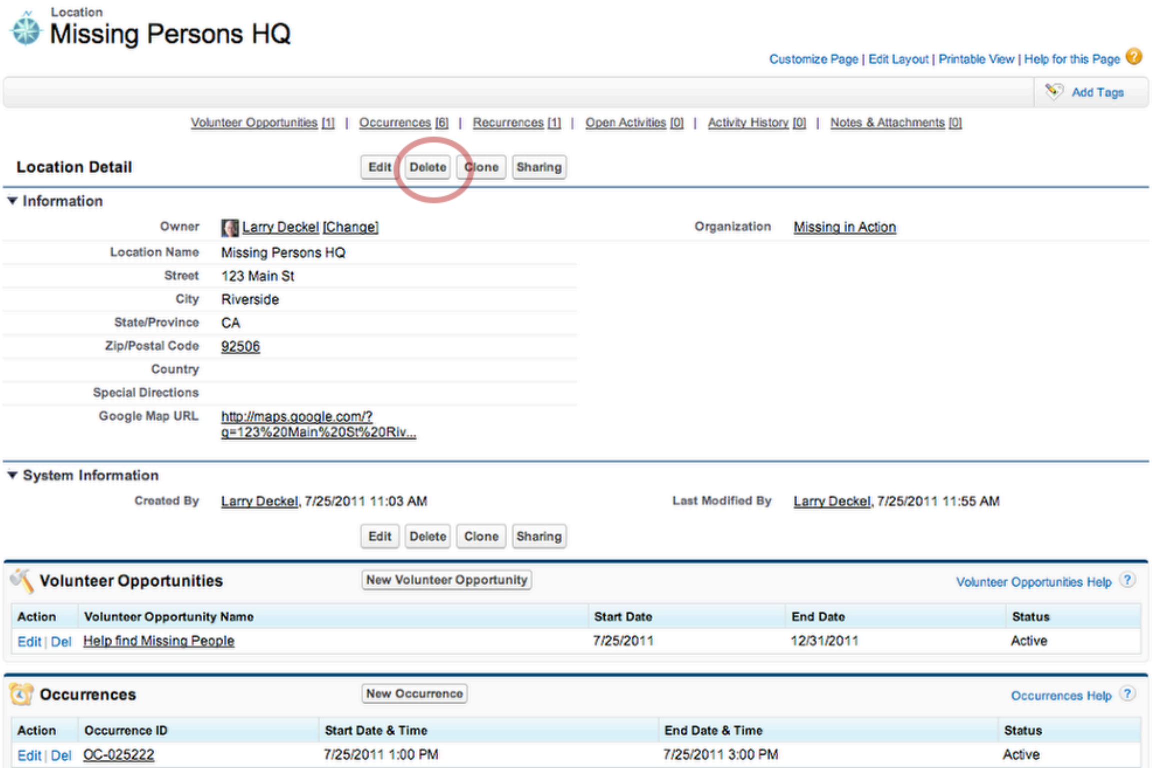
This opportunity "Help find Missing People" has "Missing Persons HQ" as its default location. This location is also used in each of its occurrences.

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



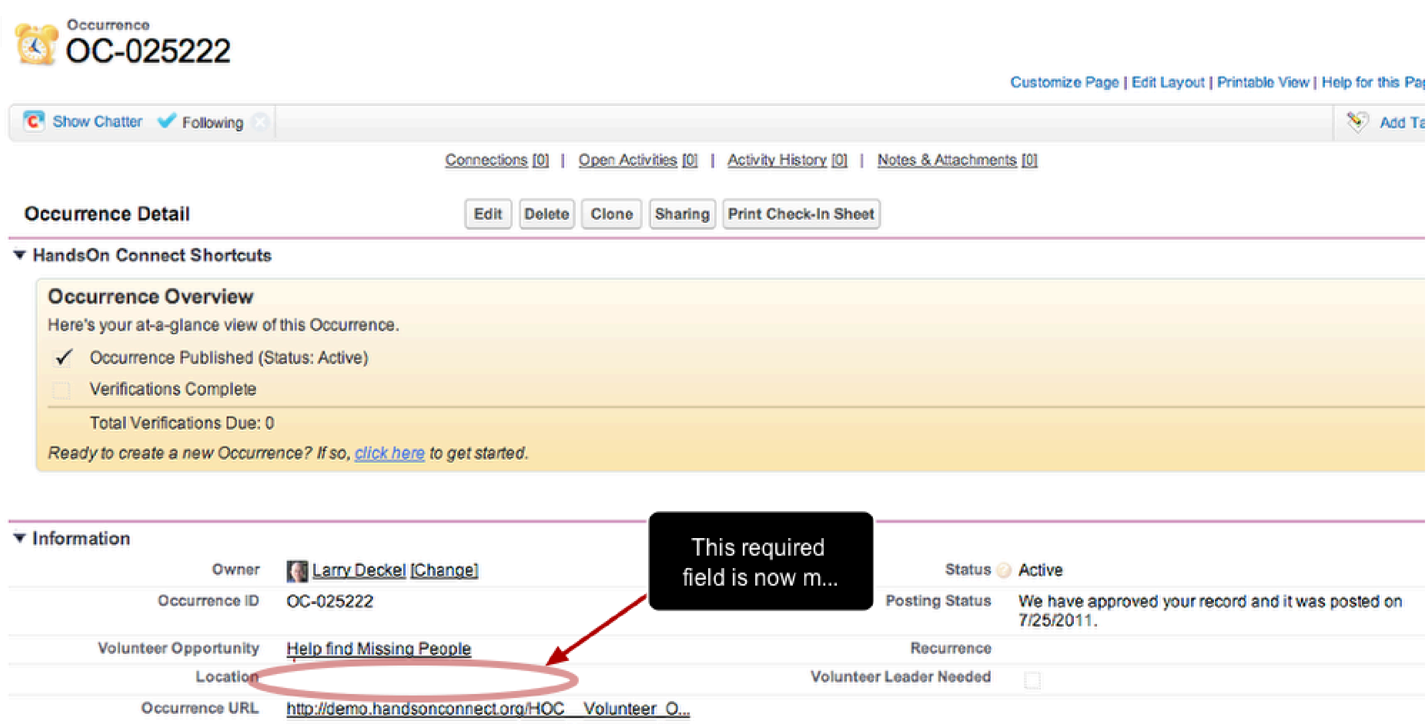
A recurrence for this opportunity has the volunteer opportunity taking place on the last Monday of every month.

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



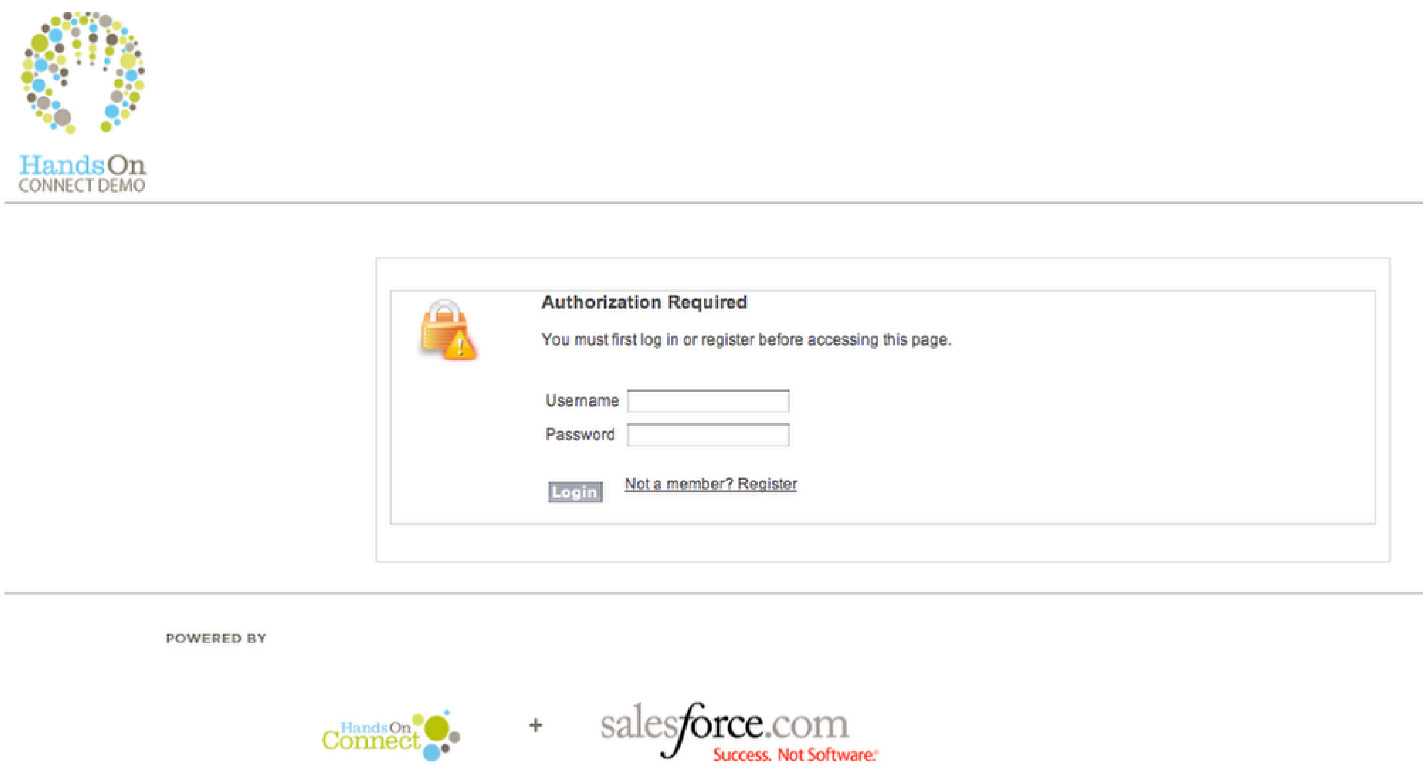
A 'helpful' staff person decided for some reason to delete this location as they heard it was closed down.

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.



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.



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!

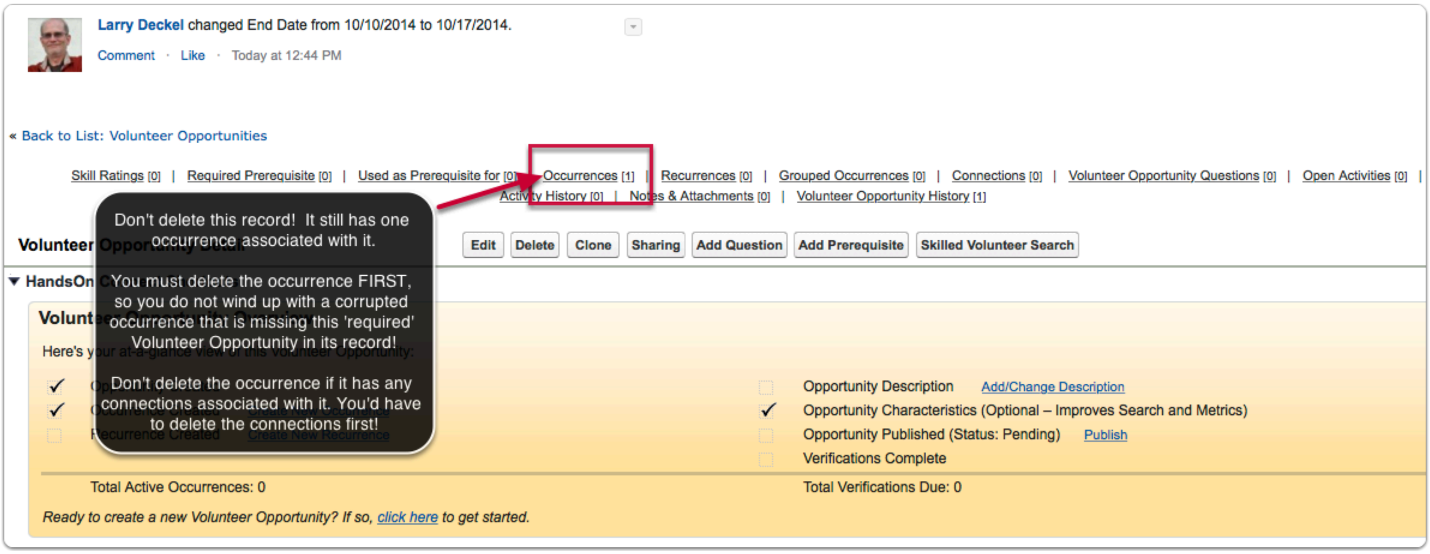
How to "Safely" delete a Volunteer Opportunity

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).

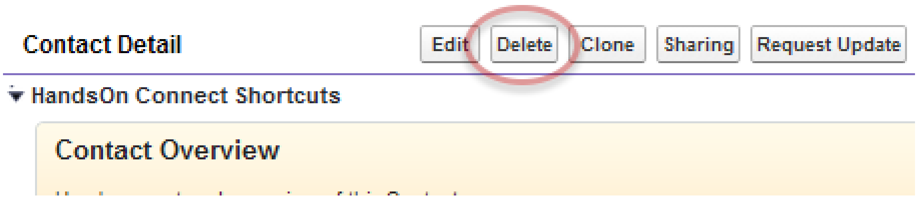
THEN, check each occurrence for the opportunity, and make sure it has no related items, and delete the occurrence.

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



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!)



You can also delete records through the related lists.

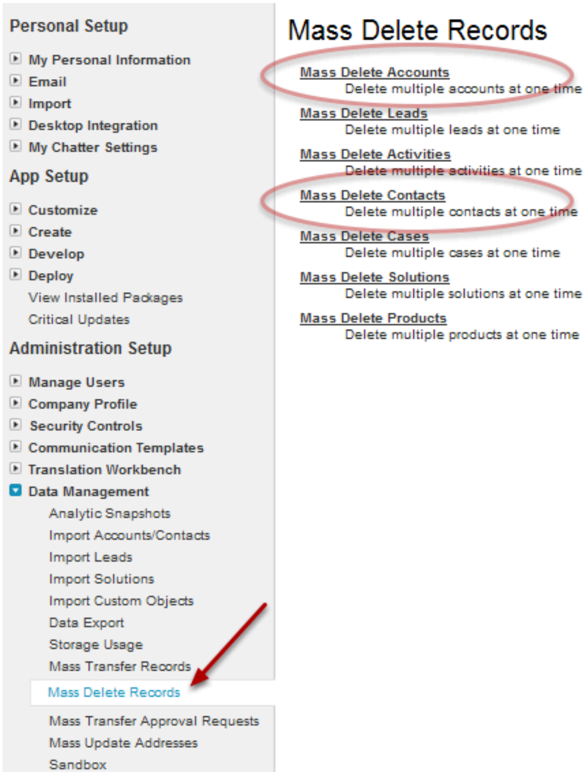
Mass Deleting of Records

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.

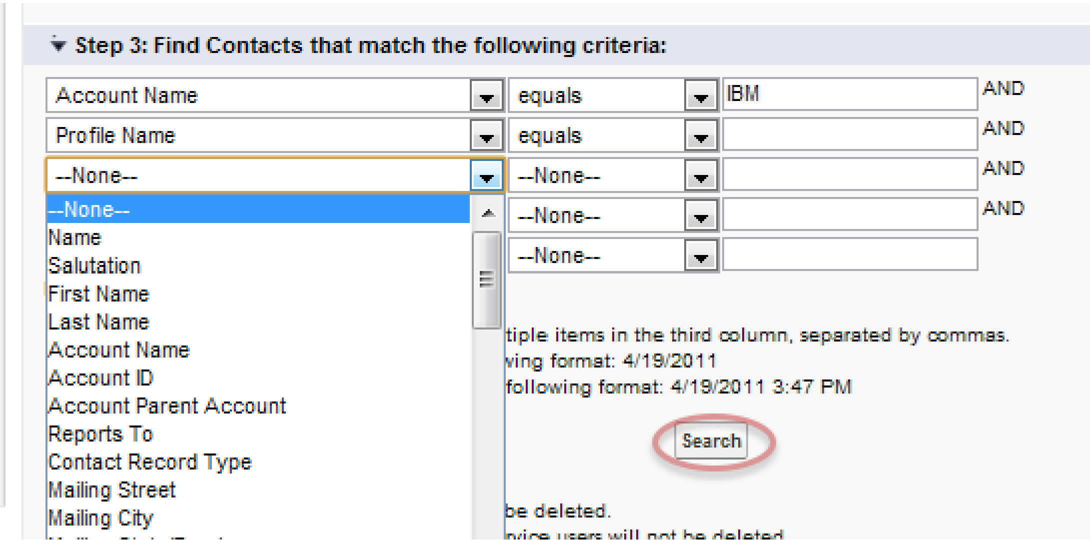
Select either Mass Delete Accounts (for Organizations) or Mass Delete Contacts



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.



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.

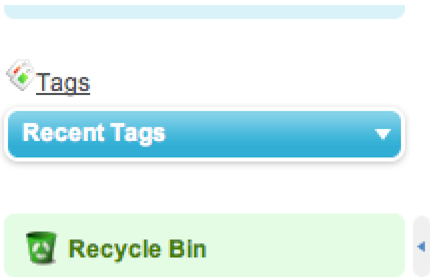
Before deleting records - make sure you are scheduling regular backups of your data.

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 responsibillity!)

How to Manage the Recycle Bin

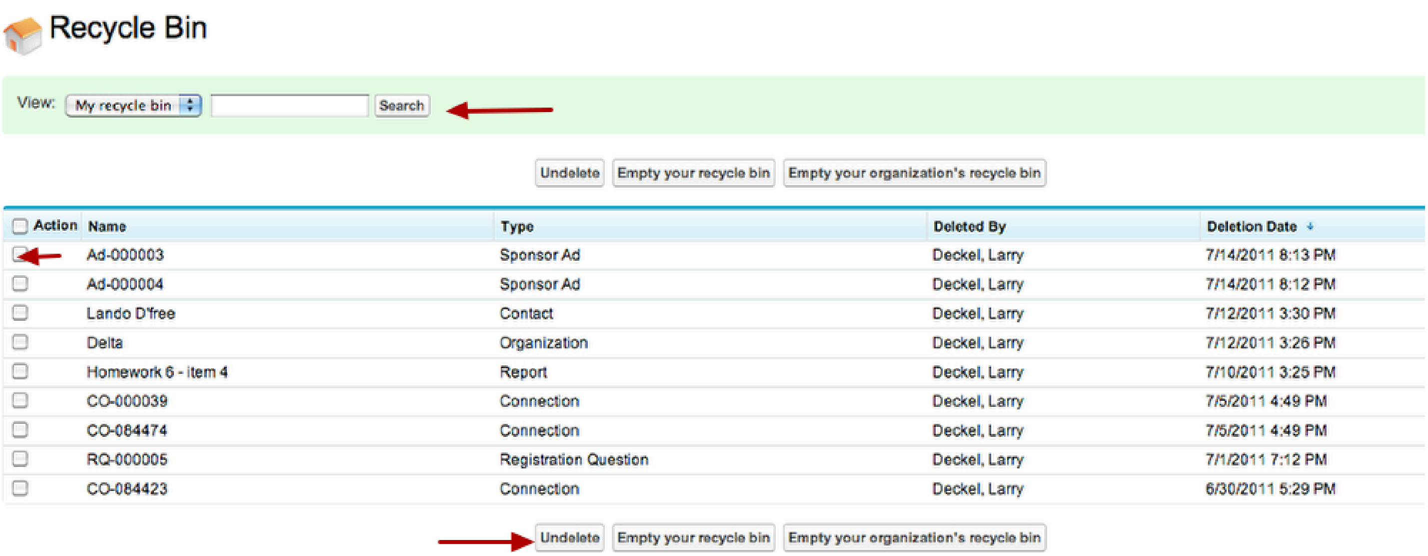
Please note that the Recycling Bin can only store **up to 5,000** items at a time. Once it has reached capacity the oldest data will be permanently deleted as new items are added to the recycling bin.

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



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

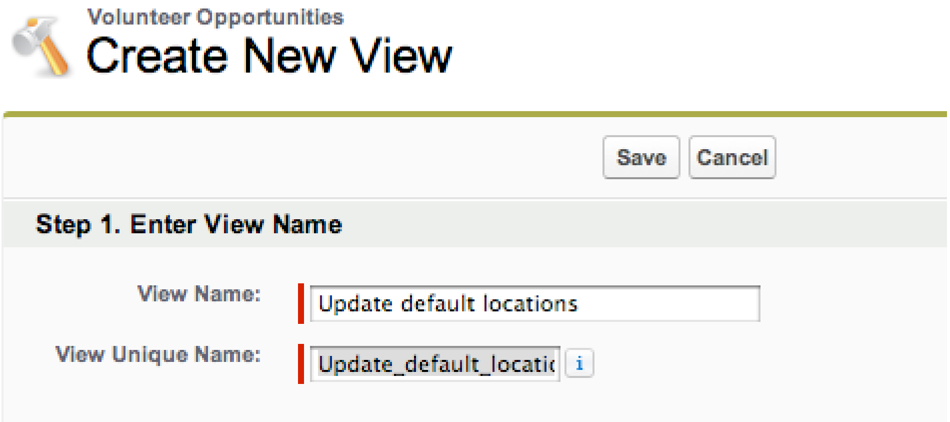
Using Views to update records

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.



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:

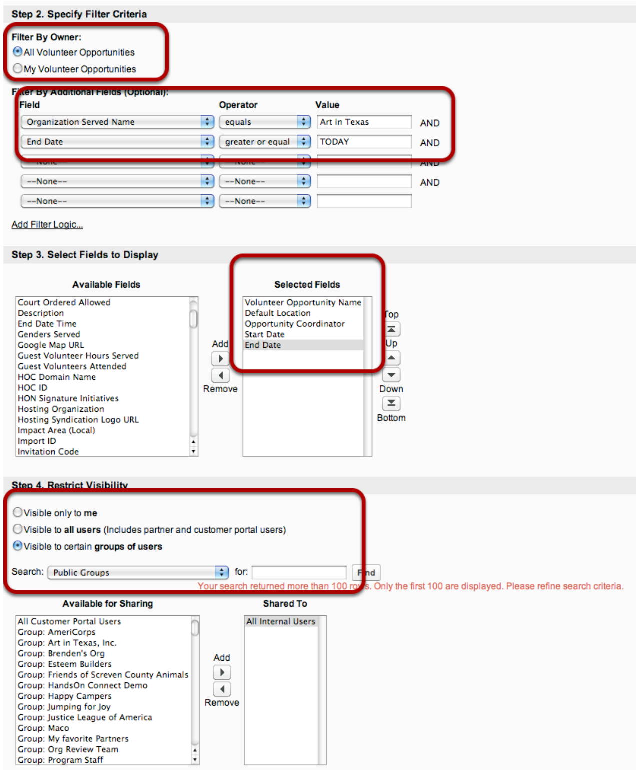
Make sure that you include the fields you want to edit in the display

Restrict visibility:

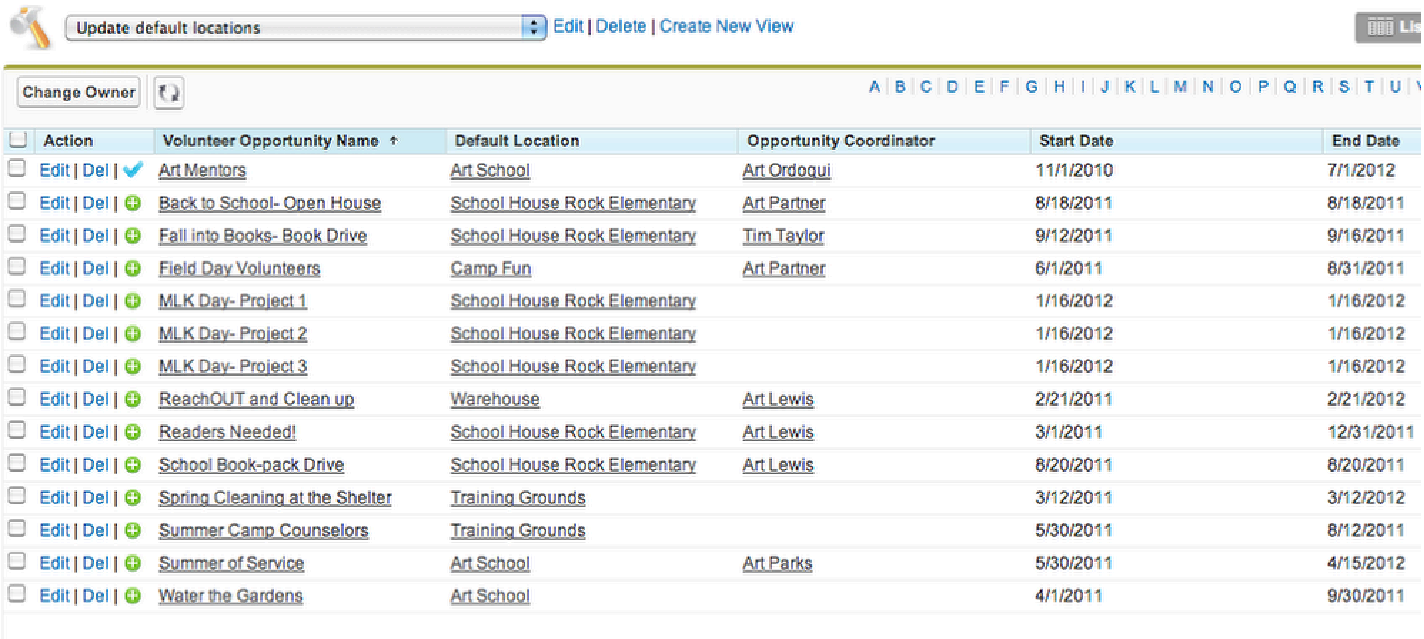
Since Staff and System Admins can create views, you want to make them accessible to all Internal Users

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.



Edit All Records



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

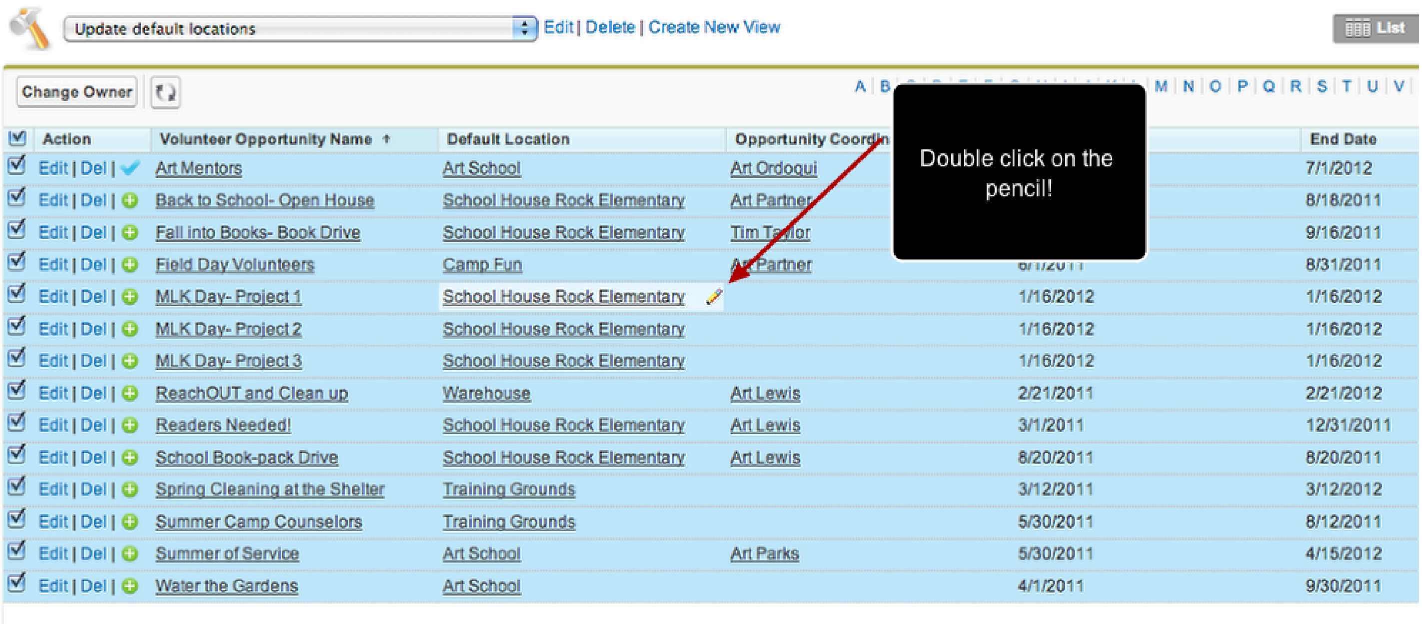
Once you have your view created, then you can edit the desired information.

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

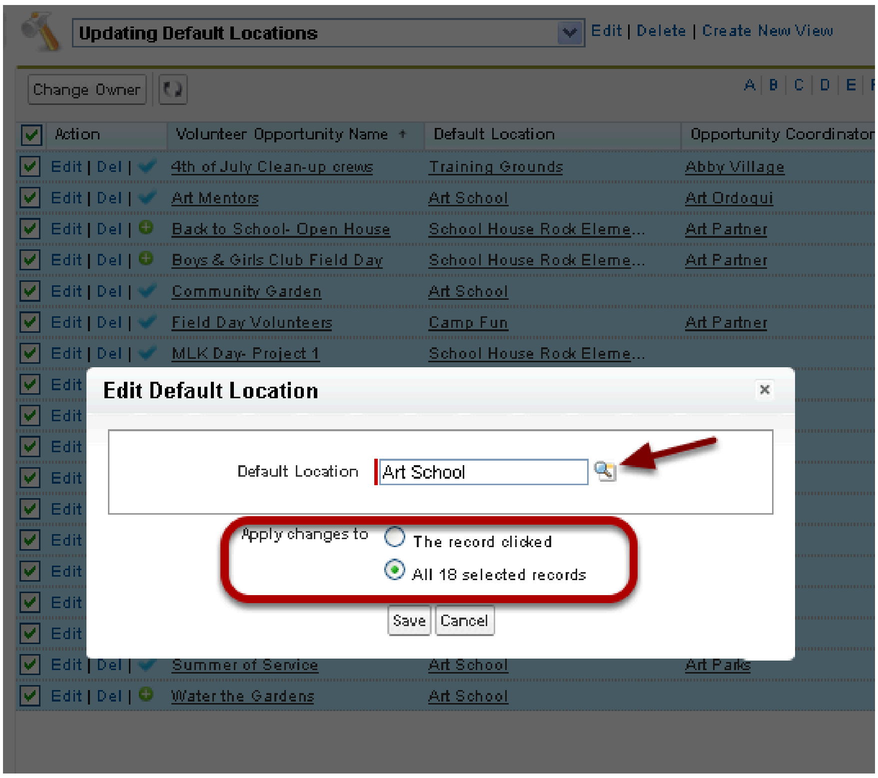
(I guess they lost all their other locations. Too Bad.)

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



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

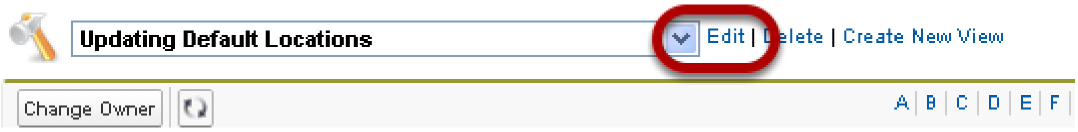


Enter the value you wish to put in the field, and then select whether to apply to just the one record, or ALL the records checked.

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.

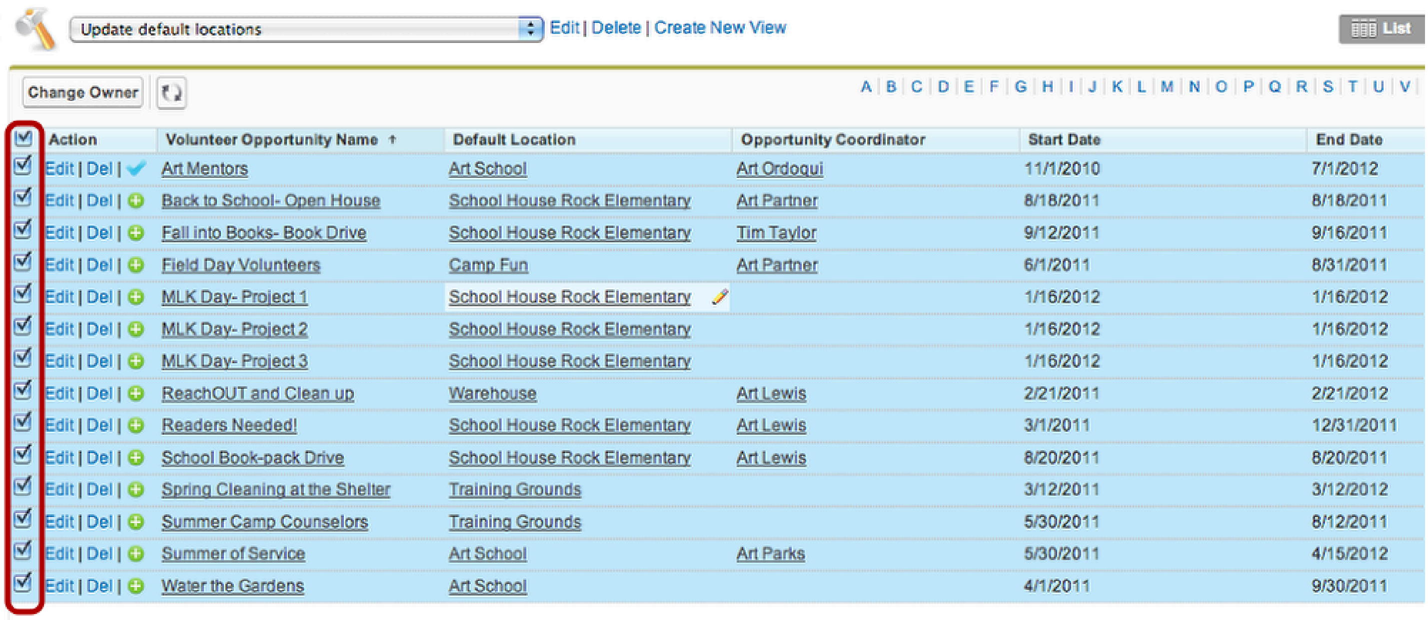
Reduce, Reuse, Recycle



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!

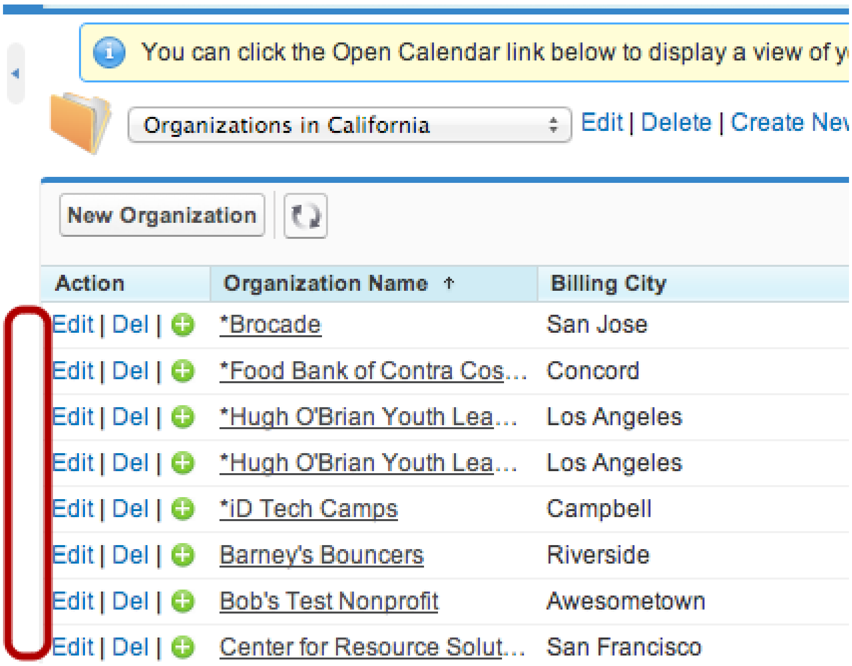
Using views to update organizations, contacts and connections

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



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

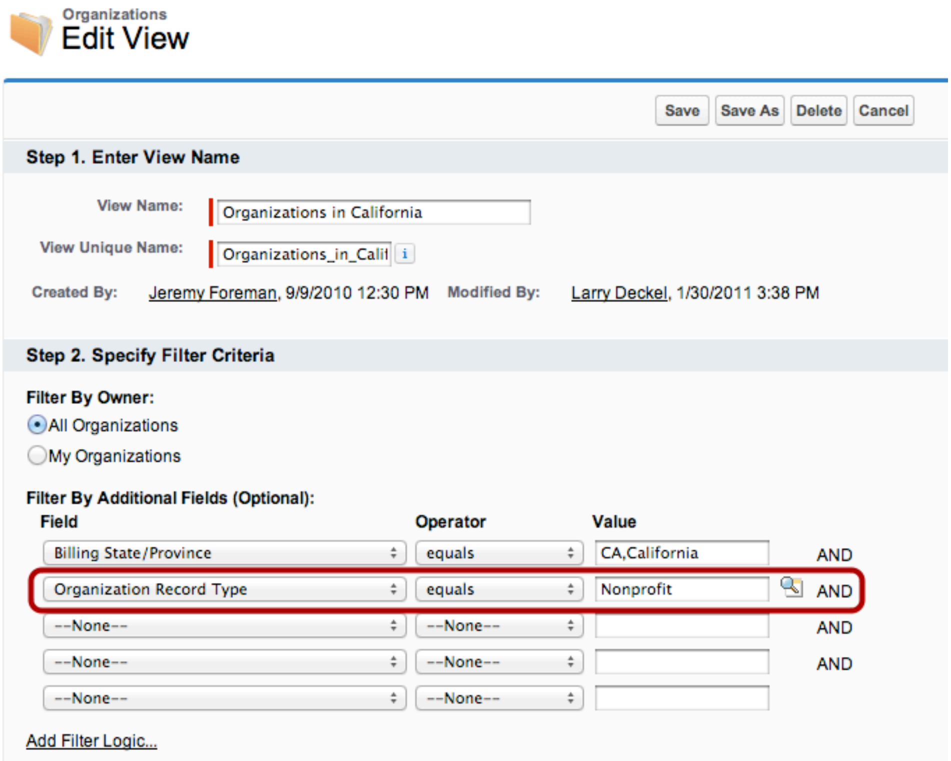
This is true of

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.

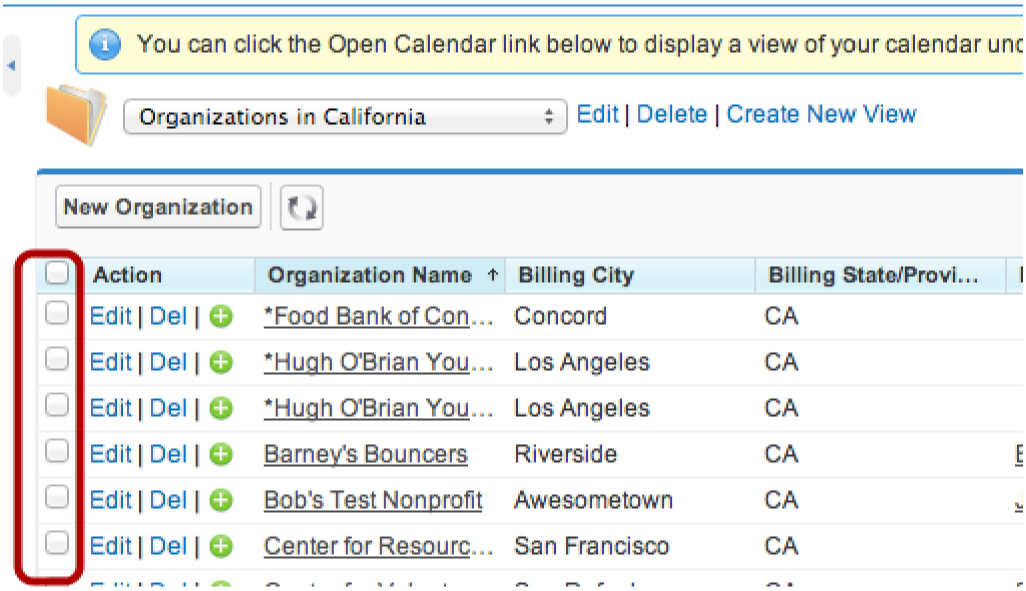


Make sure the filtter view includes a filter on 'record type' for the object.

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.



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")

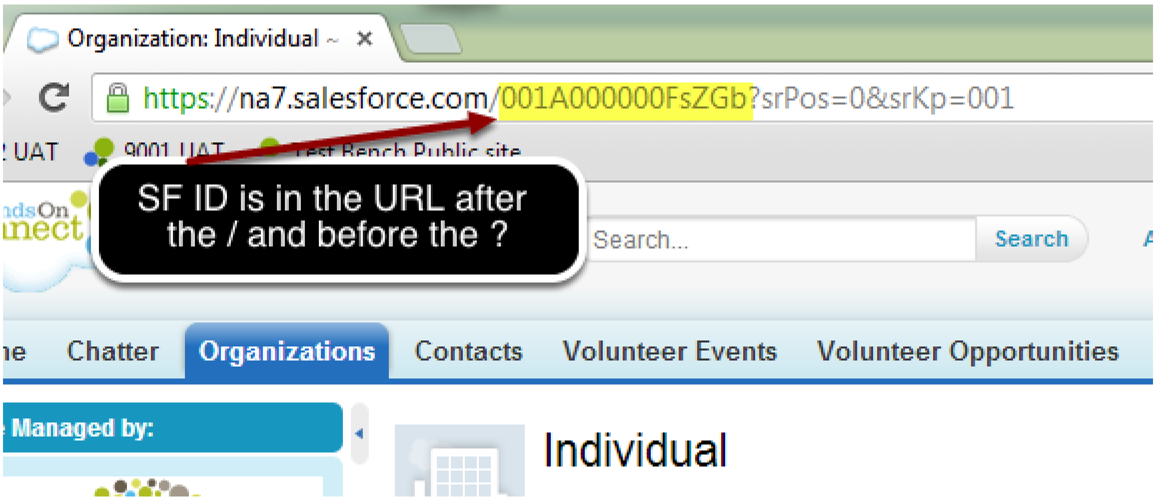
Registration Status- Options are Registered, Not Registered, and Pending (Team Confirmation)

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 you can view the field list or look at the object directly in salesforce via **setup / customize / contacts / fields**

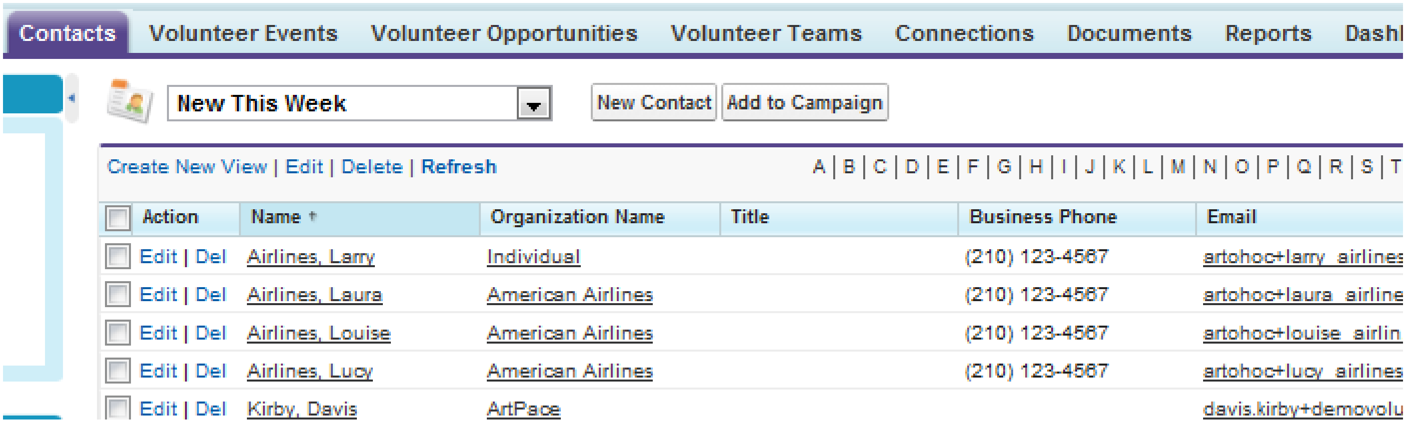
If you would like to have a template for your import file there is a blank report that you can export that contains the columns referenced above. Go to your Reports tab and search for **Contact Import Template** then export.



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



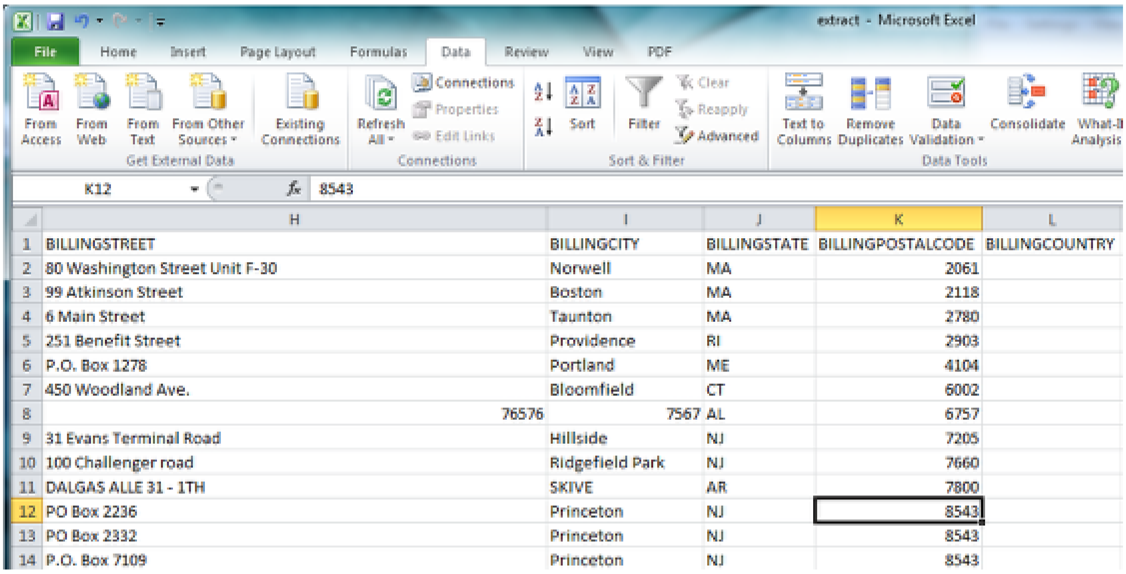
To verify that the imported data was mapped properly, you can go to the object and select the "New this Week" view from the dropdown and see that the organizations or contacts were imported correctly.

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.

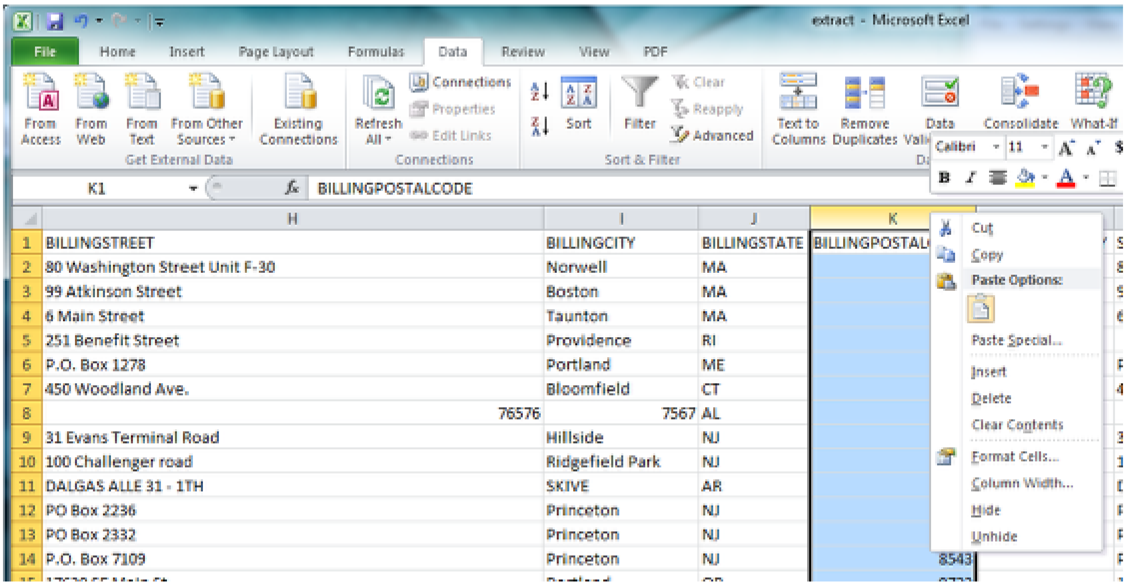
First, we open an Organizations csv file in Excel.



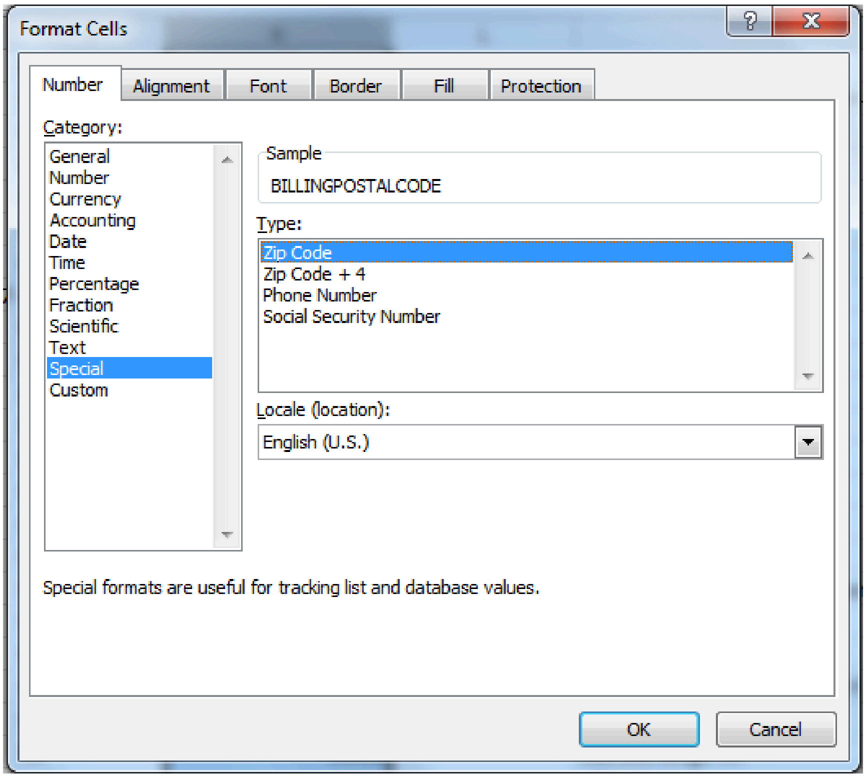
	H	I	J	K	L
1	BILLINGSTREET	BILLINGCITY	BILLINGSTATE	BILLINGPOSTALCODE	BILLINGCOUNTRY
2	80 Washington Street Unit F-30	Norwell	MA	2061	
3	99 Atkinson Street	Boston	MA	2118	
4	6 Main Street	Taunton	MA	2780	
5	251 Benefit Street	Providence	RI	2903	
6	P.O. Box 1278	Portland	ME	4104	
7	450 Woodland Ave.	Bloomfield	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...

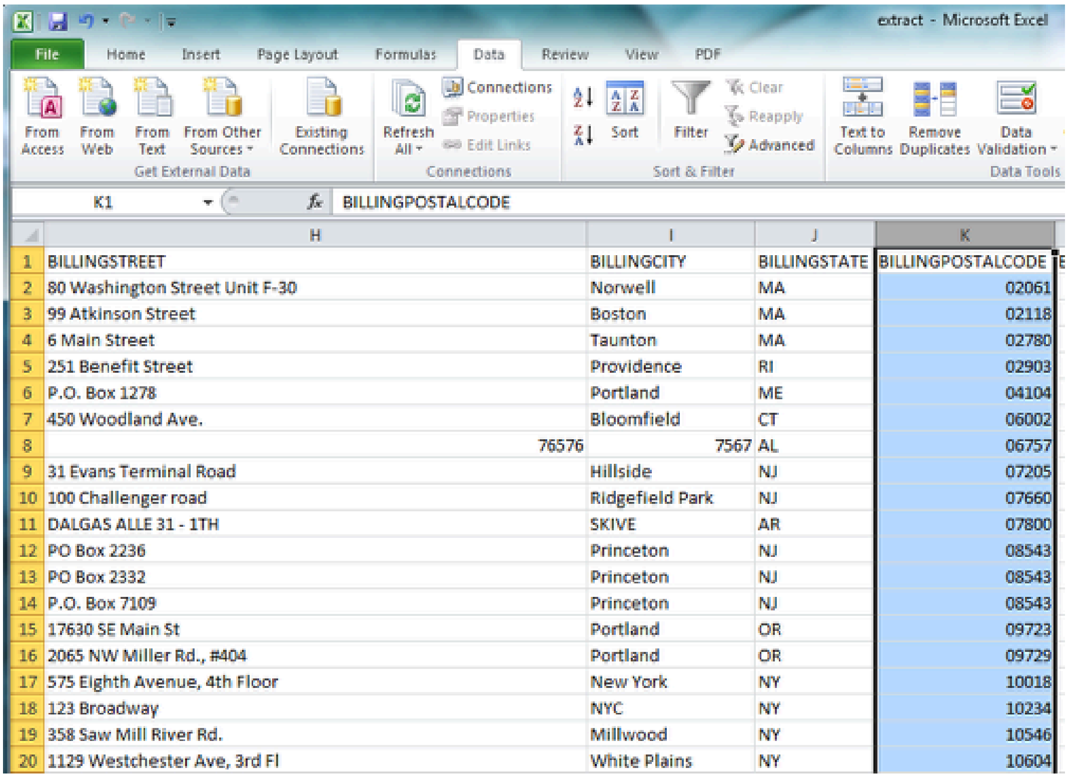


Pick the appropriate formatting.

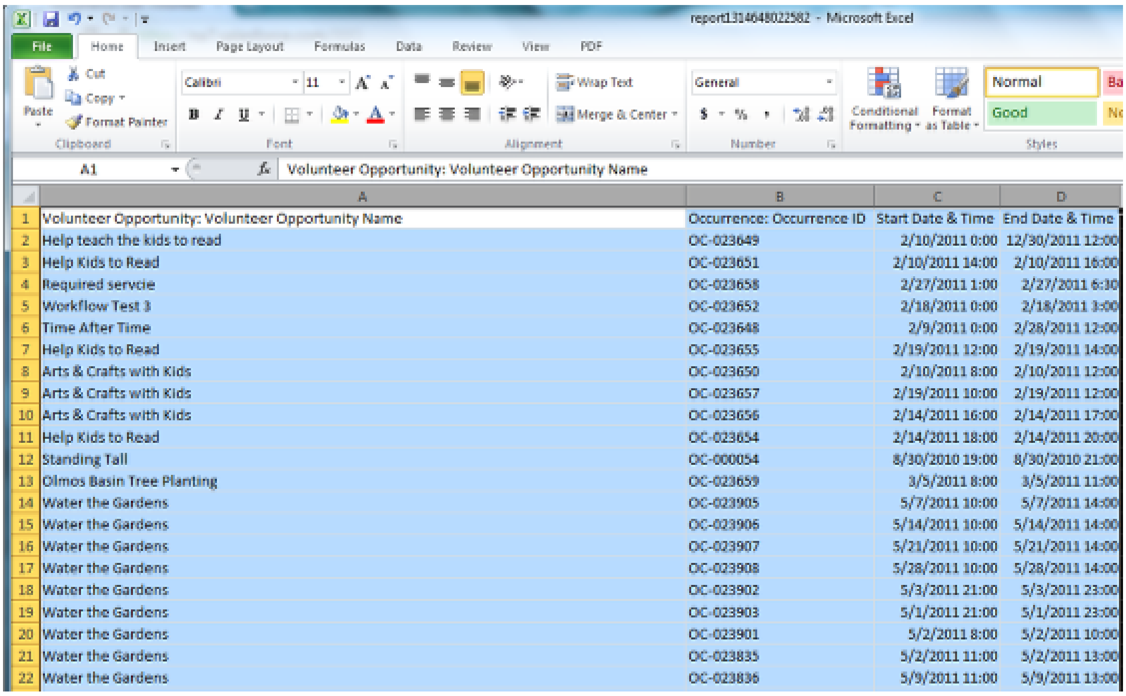


Select the Number tab. Then select Special under Category and Zip Code under Type.

Now, Zip Codes are formatted properly.

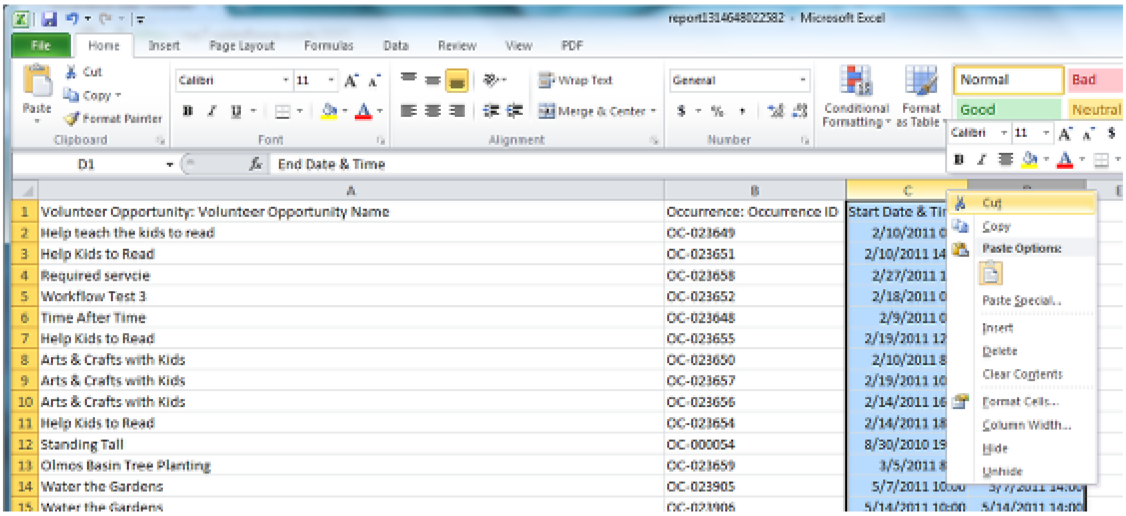


Next, we open an Occurrence csv file in Excel

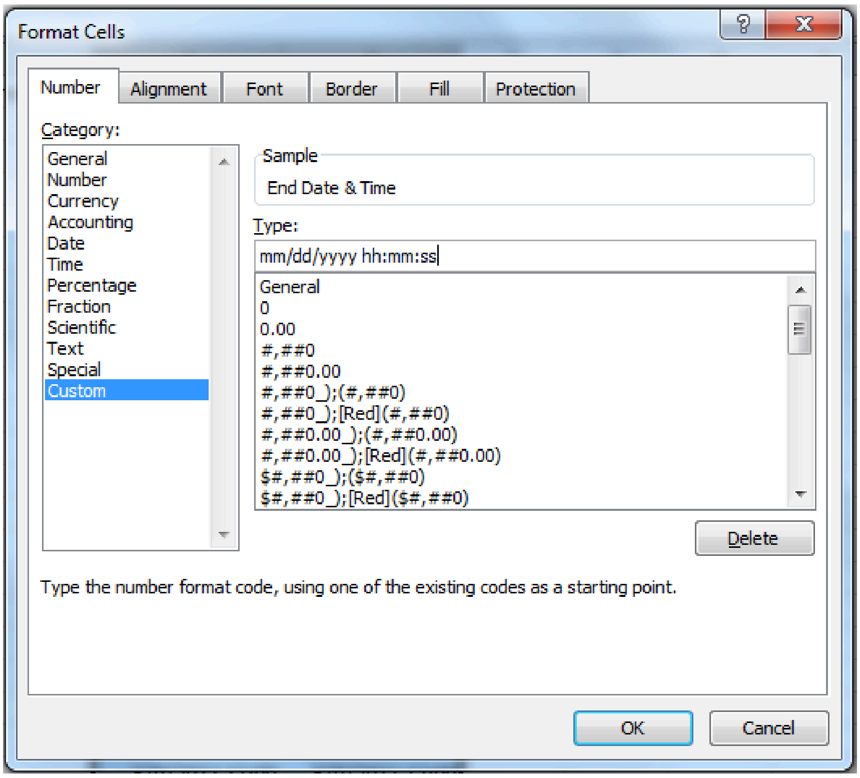


Note that the dates are formatted such that the time only includes hours and minutes. In order to import this data, Salesforce requires hours, minutes and seconds.

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

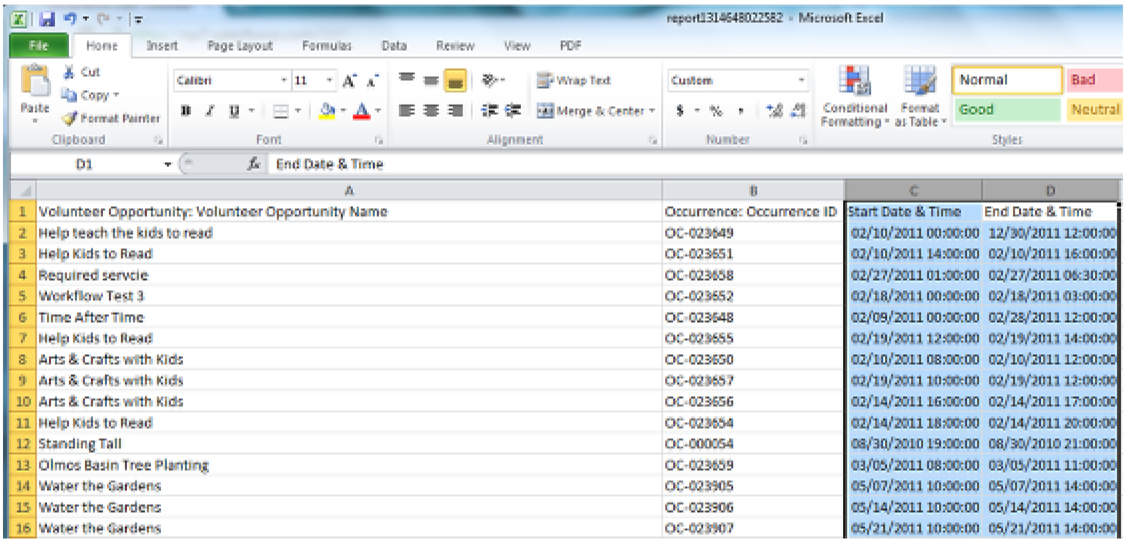


Enter the formatting that you want.



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 servcie	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

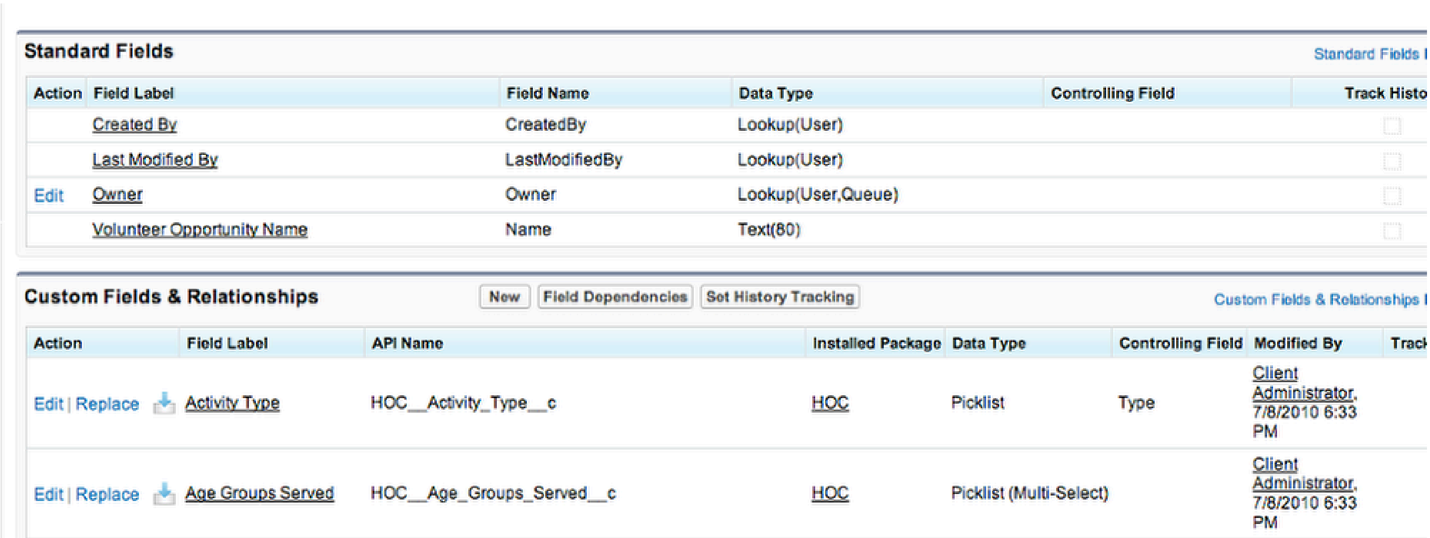
Salesforce has native data management tools that are available in HandsOn Connect that make it easy to update and import data records for use in HandsOn Connect.

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

Action	Field Label	Field Name	Data Type	Controlling Field	Track Histo
	Created By	CreatedBy	Lookup(User)		
	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	Owner	Owner	Lookup(User,Queue)		
	Volunteer Opportunity Name	Name	Text(80)		

Custom Fields & Relationships 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	
Edit | Replace	Age Groups Served	HOC__Age_Groups_Served__c	HOC	Picklist (Multi-Select)		Client Administrator, 7/8/2010 6:33 PM	

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.

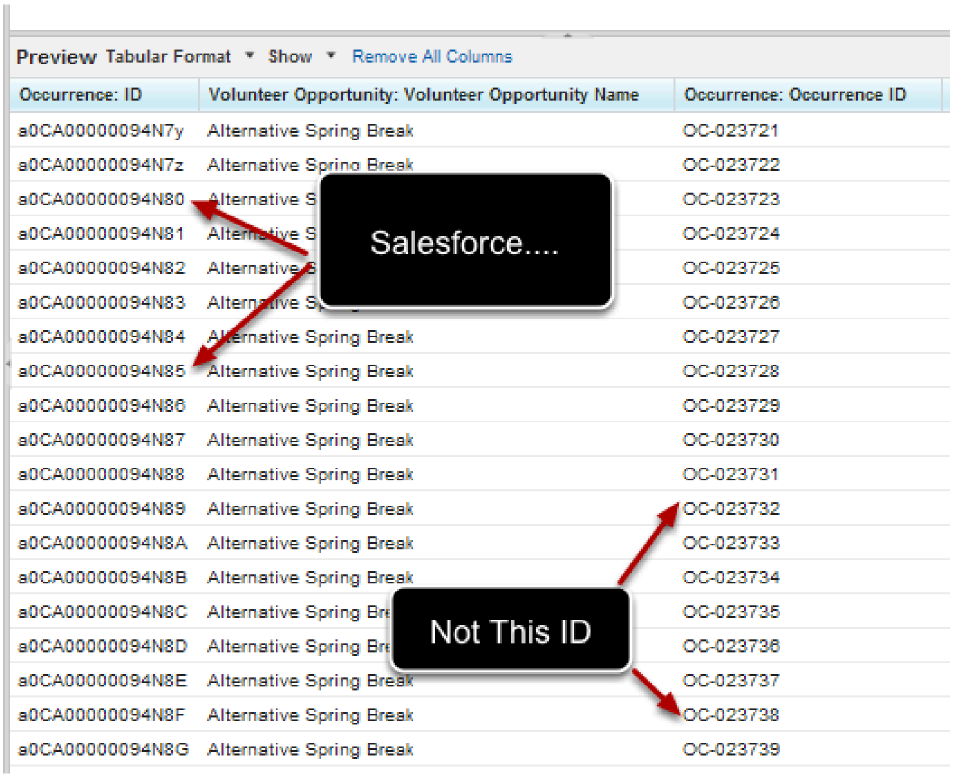
It is very important that you know the fields you have to work with, their picklist values, and how they are related.

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


Preview Tabular Format ▾ Show ▾ Remove All Columns

Occurrence: ID	Volunteer Opportunity: Volunteer Opportunity Name	Occurrence: Occurrence ID
a0CA00000094N7y	Alternative Spring Break	OC-023721
a0CA00000094N7z	Alternative Spring Break	OC-023722
a0CA00000094N80	Alternative S	OC-023723
a0CA00000094N81	Alternative S	OC-023724
a0CA00000094N82	Alternative S	OC-023725
a0CA00000094N83	Alternative S	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 Bre	OC-023735
a0CA00000094N8D	Alternative Spring Bre	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 accidently 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.

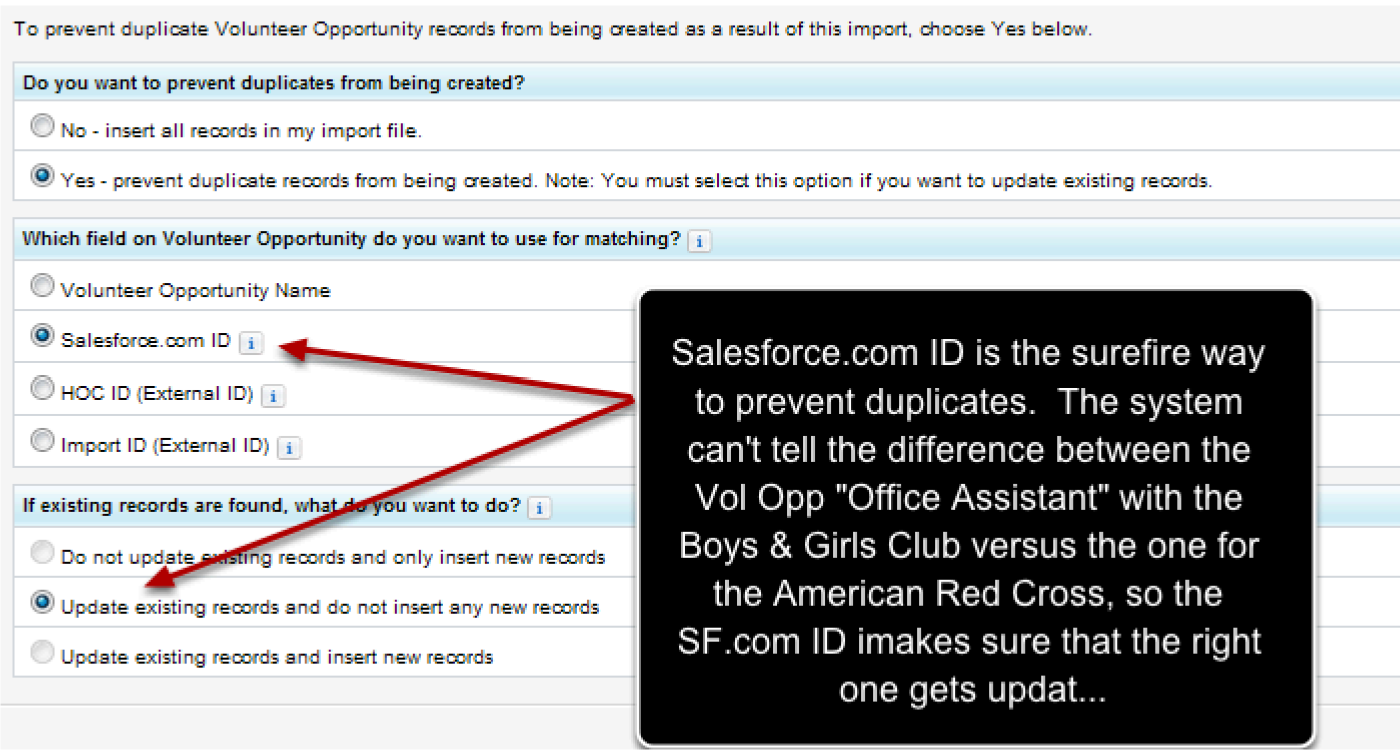
This report is the **BEFORE** value of your data.

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



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

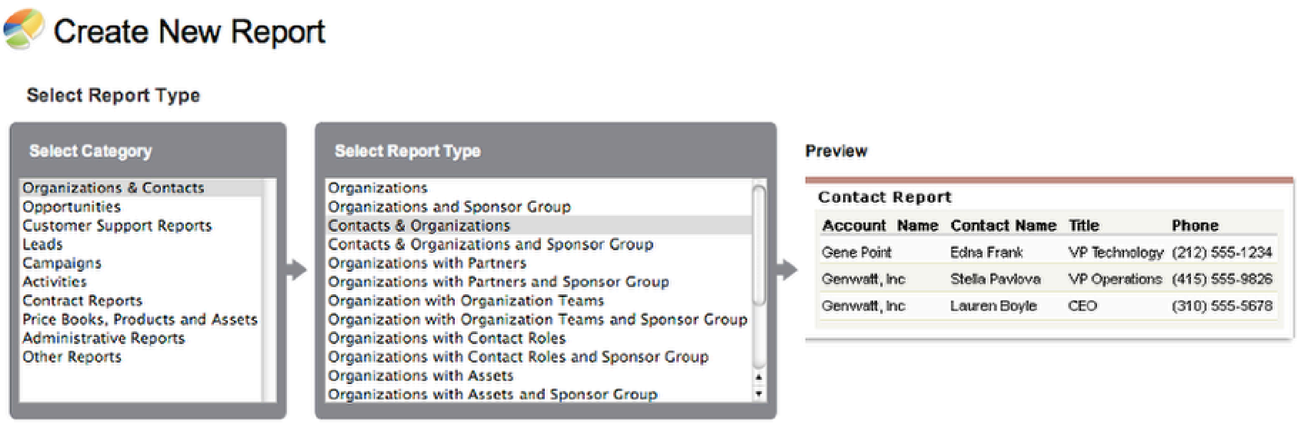
When a volunteer registers on the public site, they enter their Employer Name, but they are still assigned t the Organization Name: "Individual"

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.

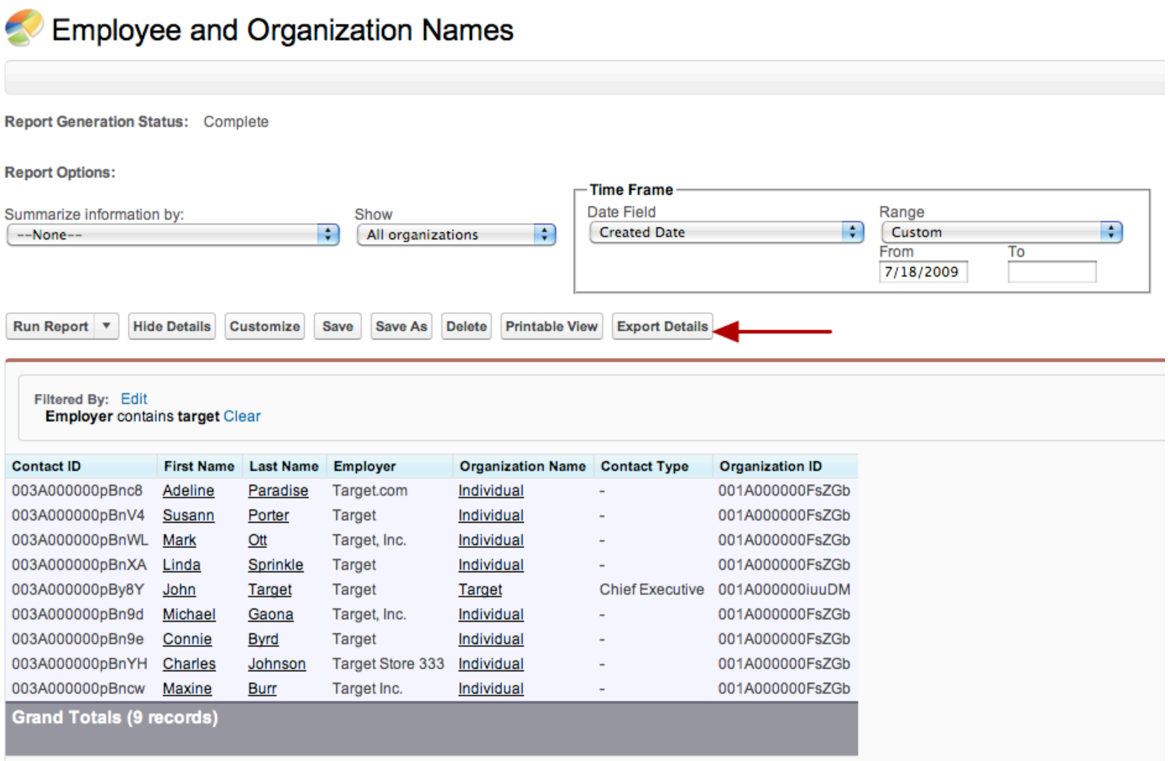
Step 1: Create the Report



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:



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.

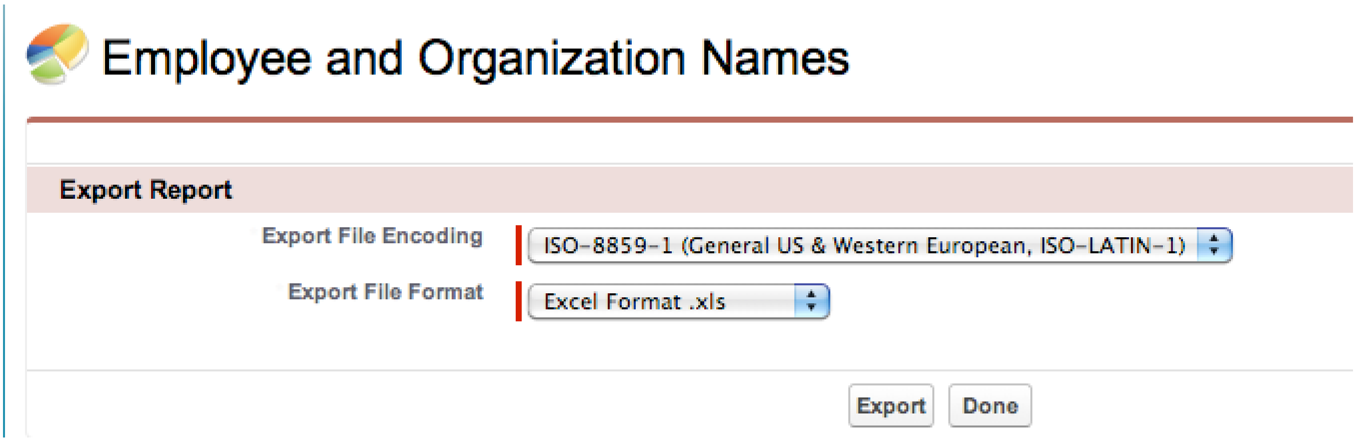
We can see also that they are currently associated with the organization Individual and have no contact type.

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

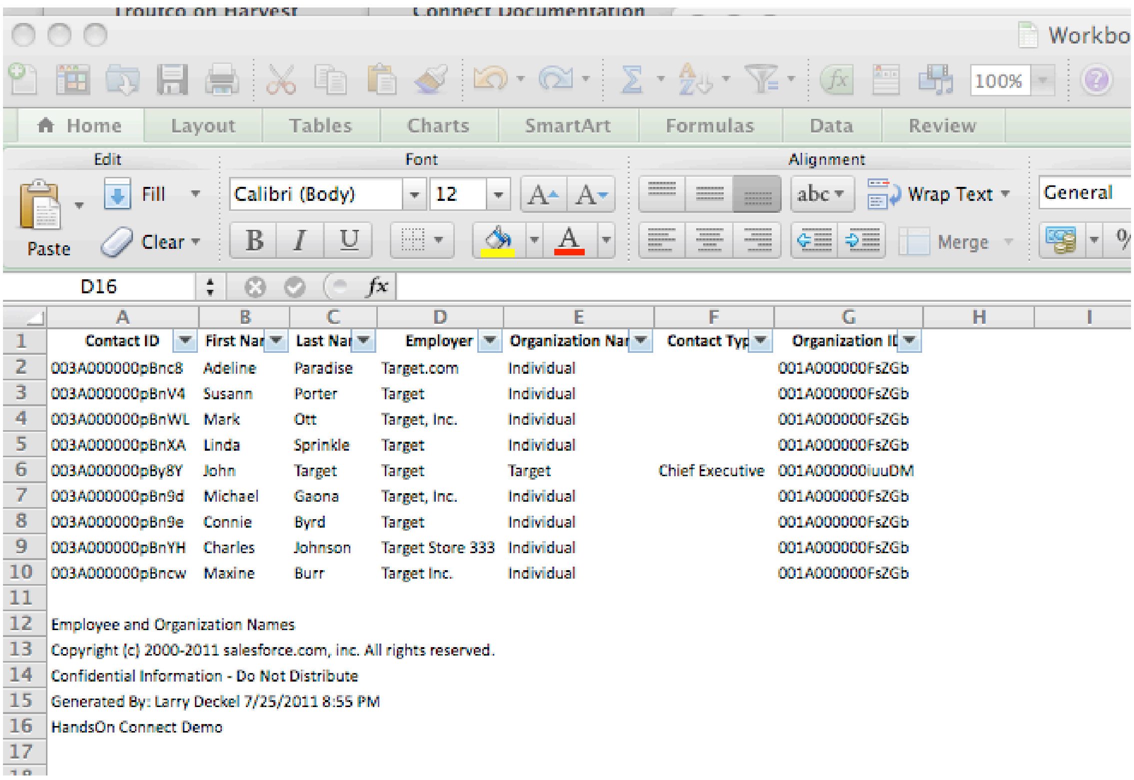


I can choose to export the data as a .csv file or an excel file

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.



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

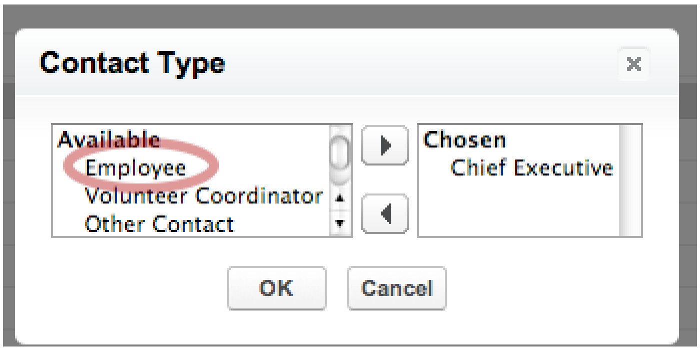
2) You must delete the footer info in rows 12 - 16

3) I can now update the Organization Name for each organization to "Target", and update the contact type to each record to 'employee"

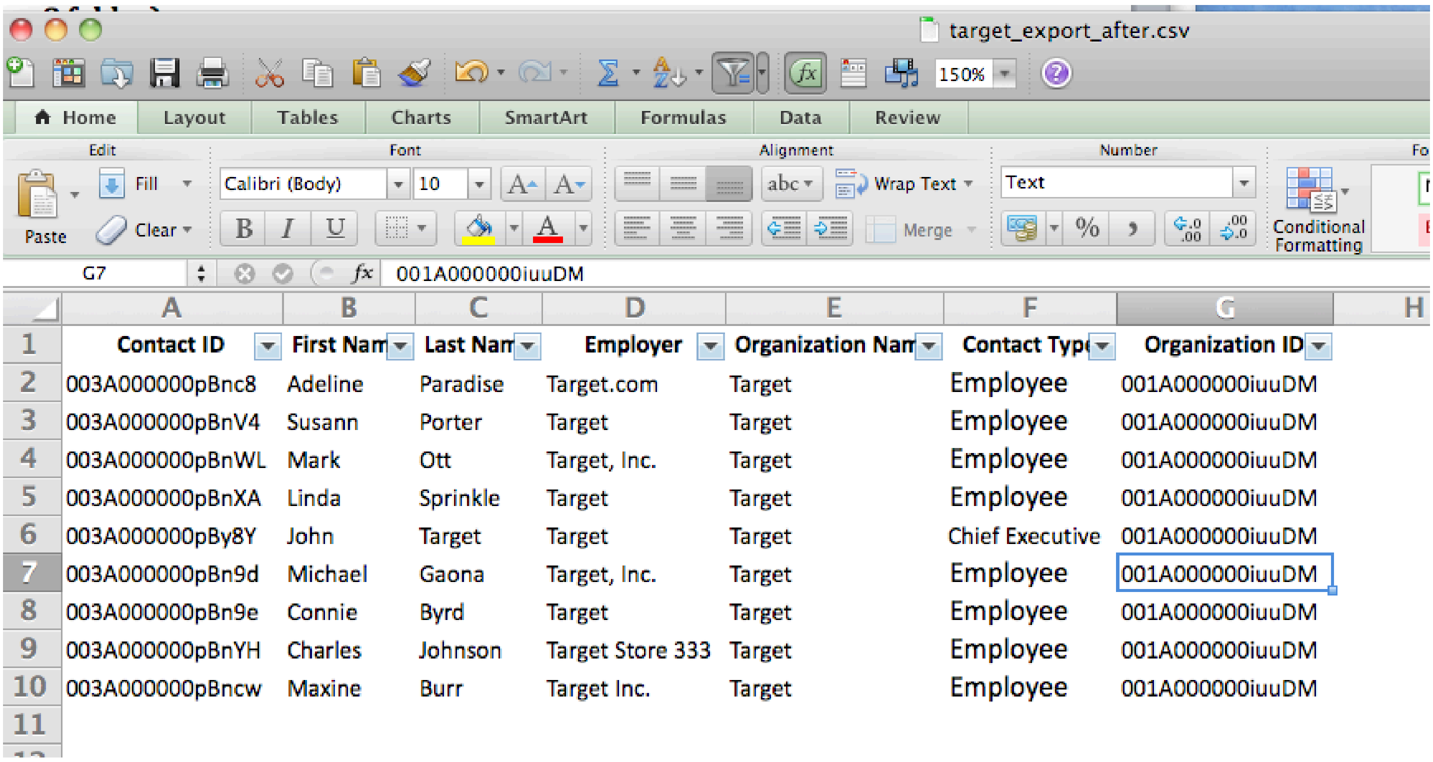
Note: I consult the picklist values and make sure that 'Employee' is a valid value, and that it uses an upper case 'E'. It must be an exact match.

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:



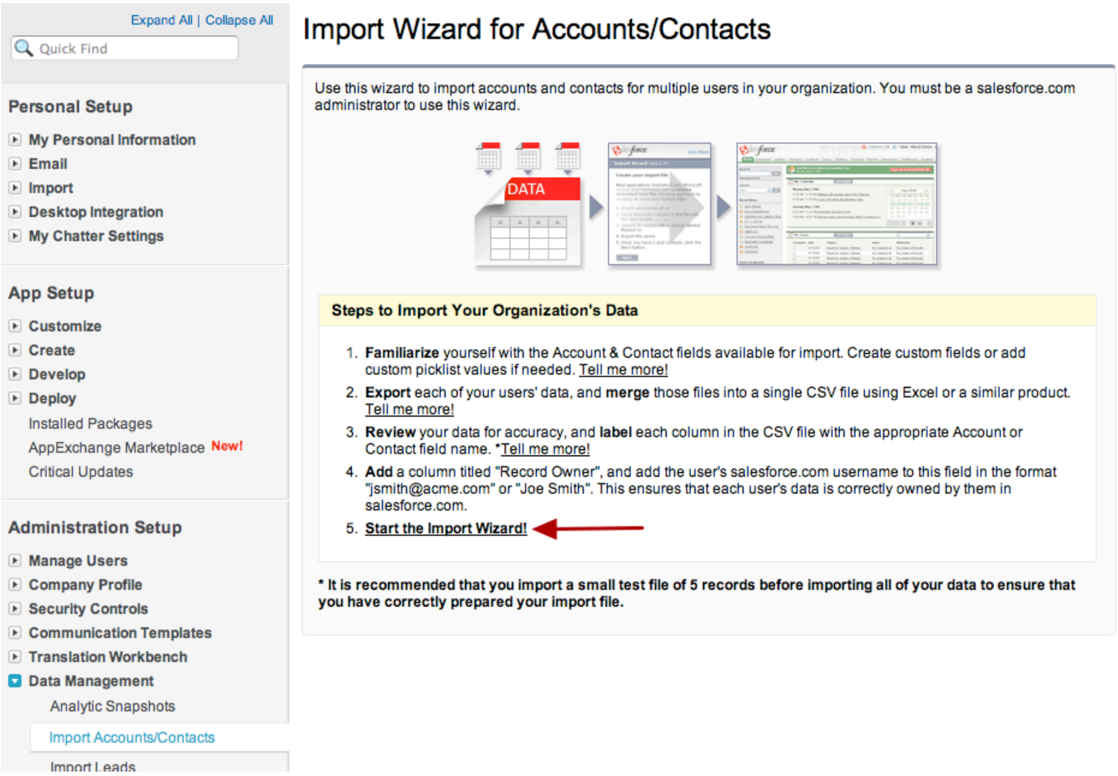
My revised spreadsheet looks like this:



Contact ID	First Name	Last Name	Employer	Organization Name	Contact Type	Organization ID
003A000000pBnc8	Adeline	Paradise	Target.com	Target	Employee	001A000000iuuDM
003A000000pBnV4	Susann	Porter	Target	Target	Employee	001A000000iuuDM
003A000000pBnWL	Mark	Ott	Target, Inc.	Target	Employee	001A000000iuuDM
003A000000pBnXA	Linda	Sprinkle	Target	Target	Employee	001A000000iuuDM
003A000000pBy8Y	John	Target	Target	Target	Chief Executive	001A000000iuuDM
003A000000pBn9d	Michael	Gaona	Target, Inc.	Target	Employee	001A000000iuuDM
003A000000pBn9e	Connie	Byrd	Target	Target	Employee	001A000000iuuDM
003A000000pBnYH	Charles	Johnson	Target Store 333	Target	Employee	001A000000iuuDM
003A000000pBncw	Maxine	Burr	Target Inc.	Target	Employee	001A000000iuuDM

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

Batch Updating the Records



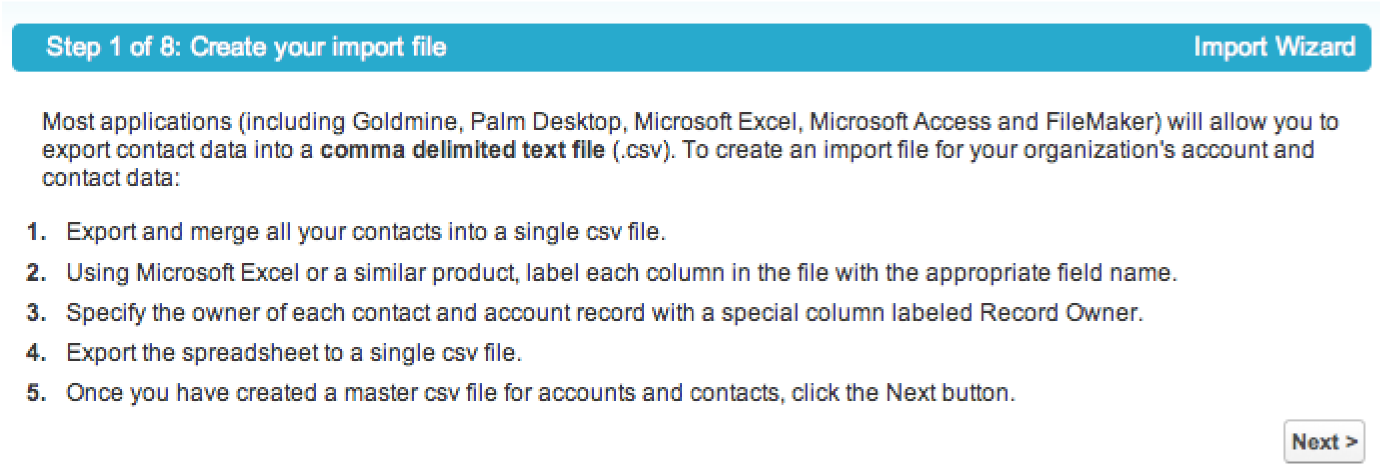
Go to **Setup / Admin Setup / Import Accounts/Contacts** to get the import wizard for accounts/contacts.

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!

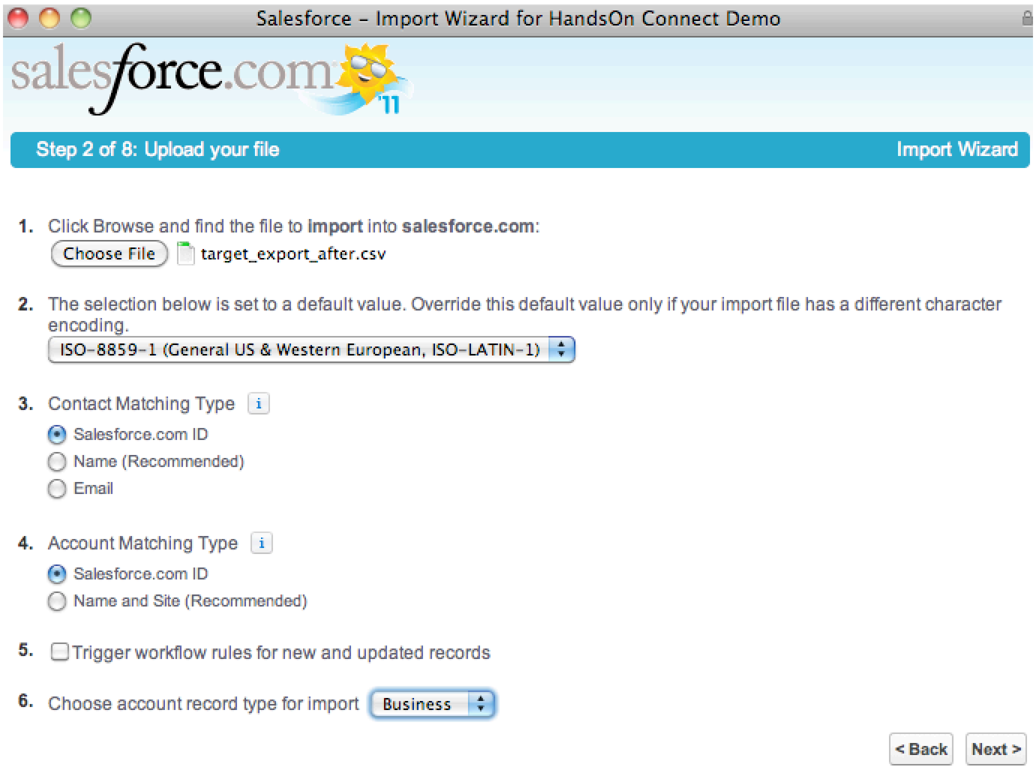
Click on "Start the Import Wizard to start!"

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



We've got step 1 done!

Step 2



1. We choose our edited file.

2. Leave at default

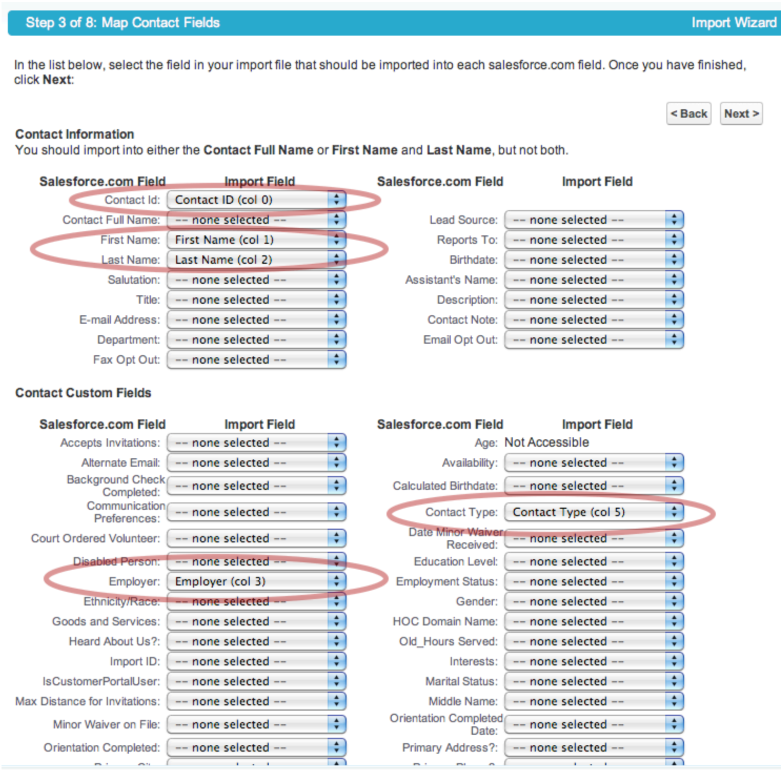
3. We want to use the Salesforce.com ID (because in this case we have them). This will prevent duplicates

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!

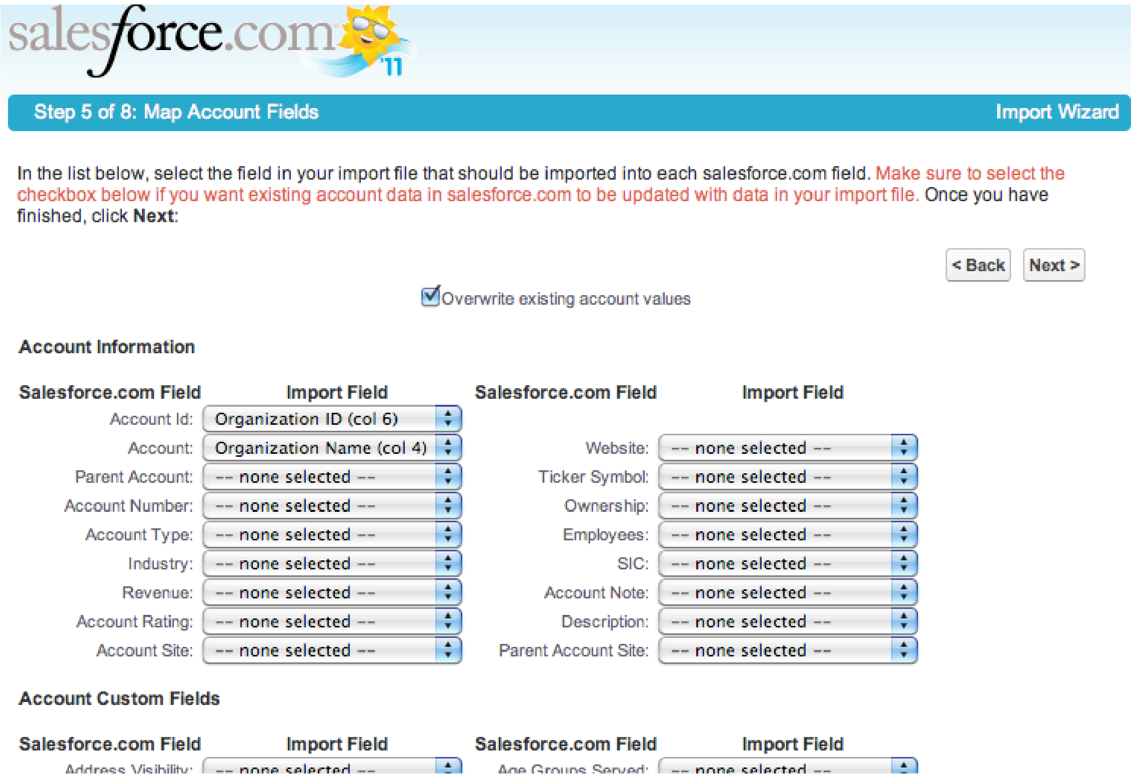
Step 3



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



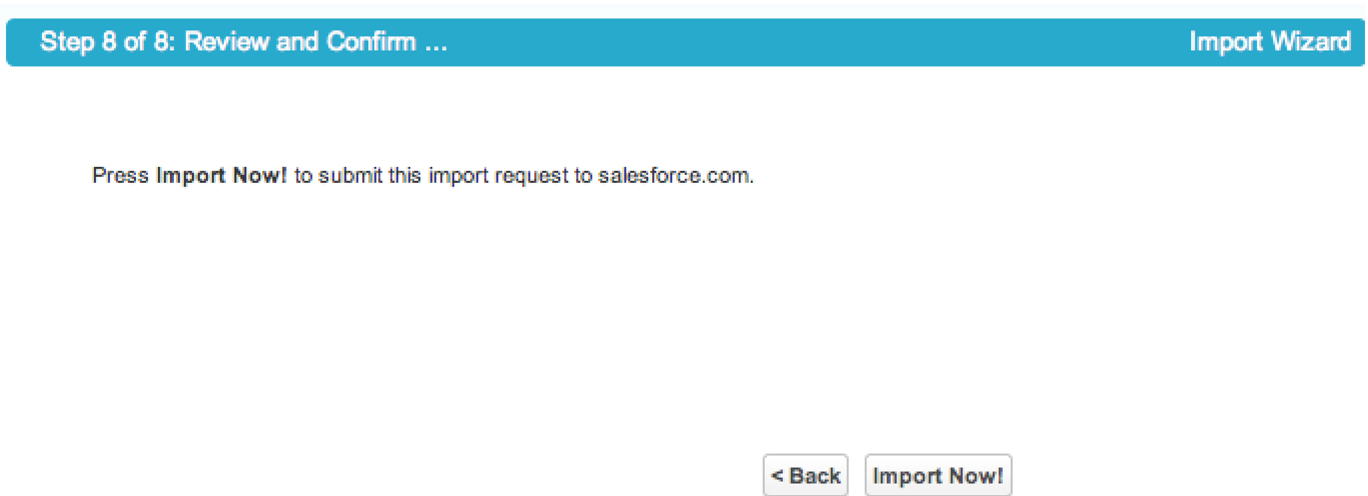
Here we have to manually map, because our field "Organization ID" is equivalent to what Saleforce calls Organization ID.

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.**

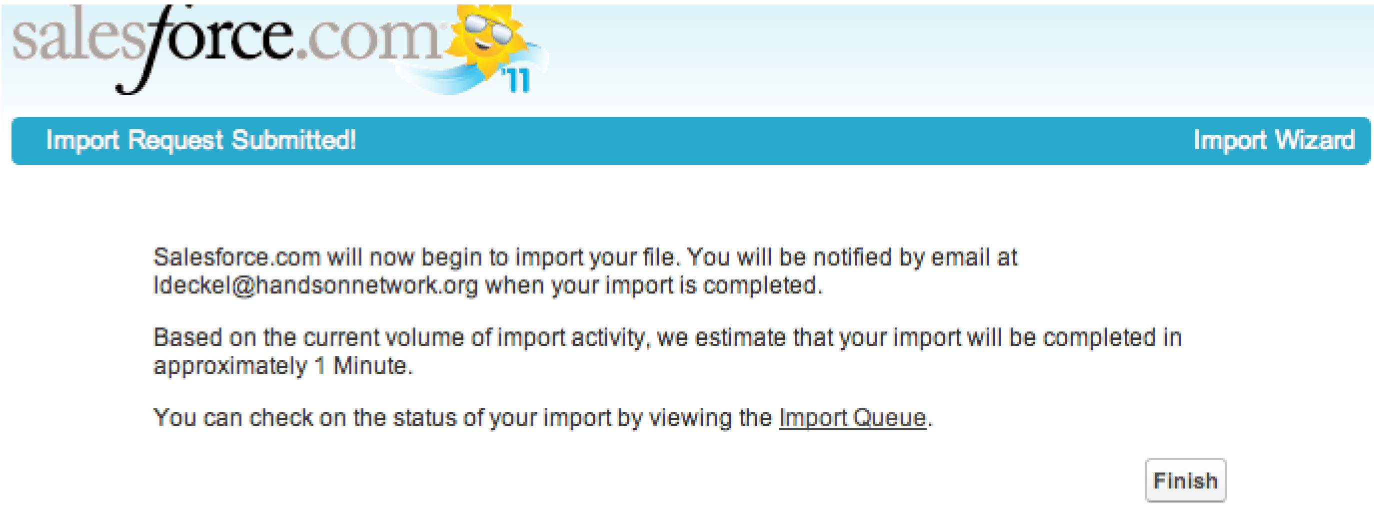
Because we have mapped all our fields - there will be no choices available for **Step 7.**



We can now click **Import Now.**

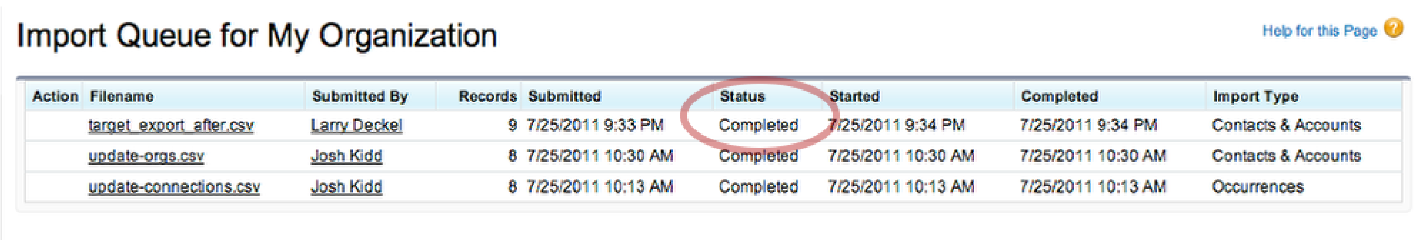
We get a message telling us we'll be notified, and approximately how long it will take.

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



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

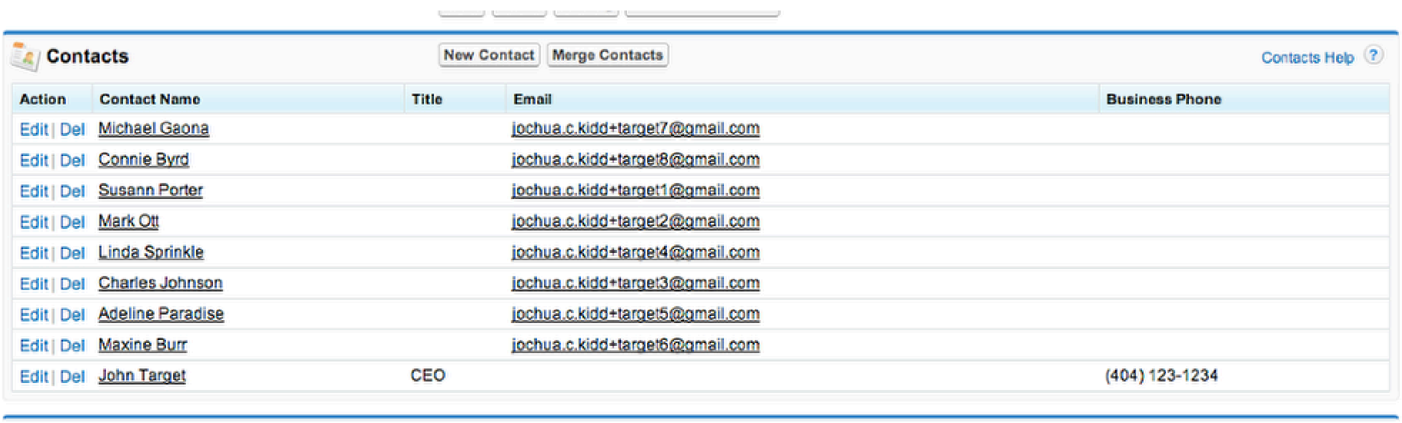
You can see when the import is completed


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

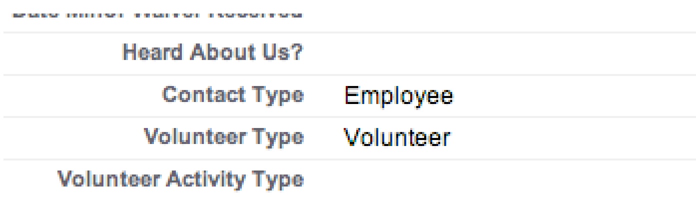

Contacts

New Contact | Merge Contacts

Contacts Help

Action	Contact Name	Title	Email	Business Phone
Edit | Del	Michael Gaona		jochua.c.kidd+target7@gmail.com	
Edit | Del	Connie Byrd		jochua.c.kidd+target8@gmail.com	
Edit | Del	Susann Porter		jochua.c.kidd+target1@gmail.com	
Edit | Del	Mark Ott		jochua.c.kidd+target2@gmail.com	
Edit | Del	Linda Sprinkle		jochua.c.kidd+target4@gmail.com	
Edit | Del	Charles Johnson		jochua.c.kidd+target3@gmail.com	
Edit | Del	Adeline Paradise		jochua.c.kidd+target5@gmail.com	
Edit | Del	Maxine Burr		jochua.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'.



My update is now complete!

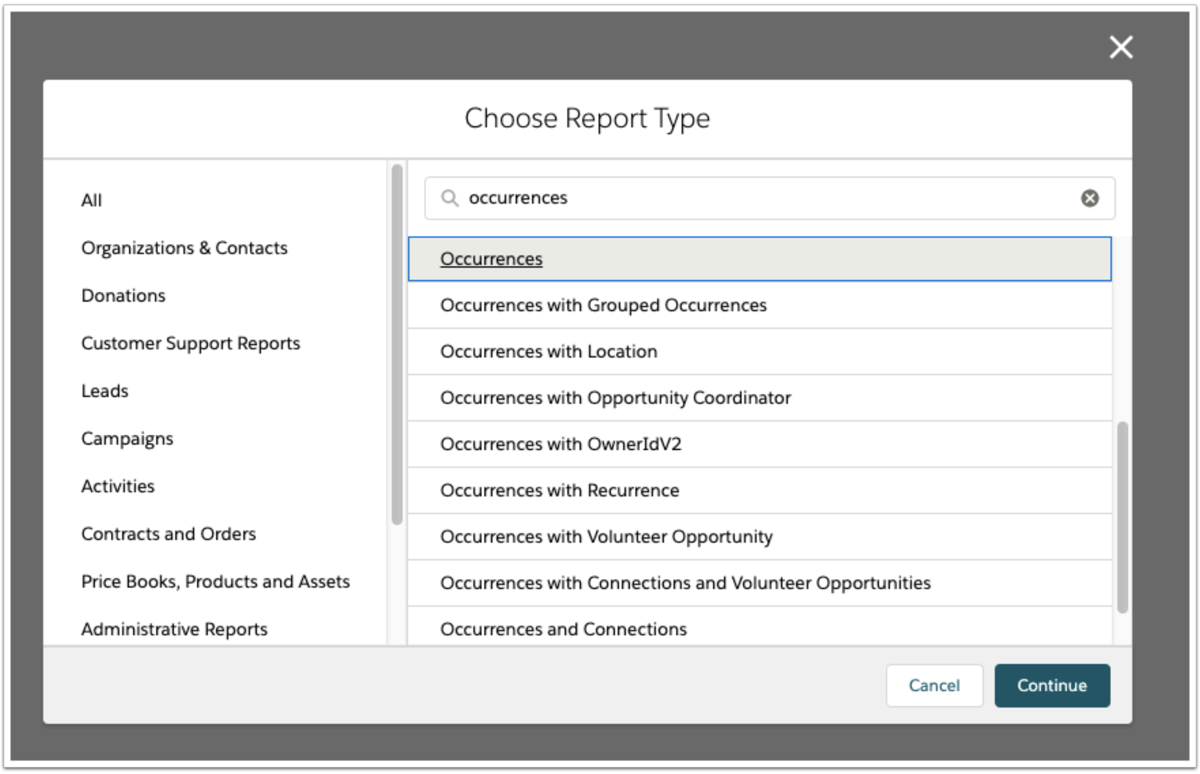
This same principle applies to any other kind of batch update.

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

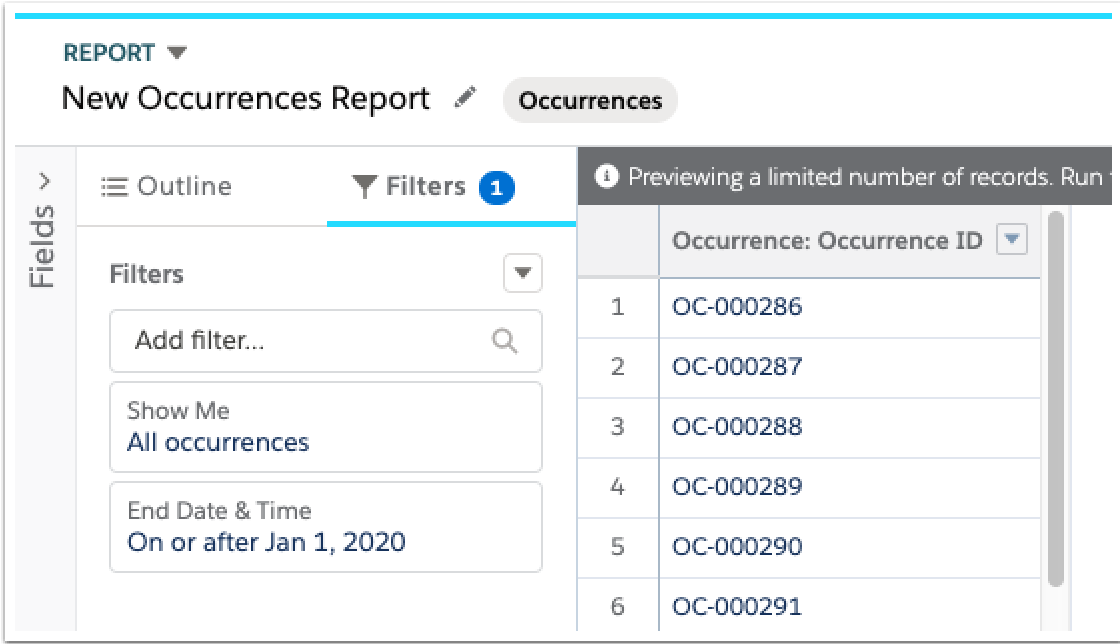
2) Date Field: End Date & Time

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.



6) Add these columns:

Occurrence: ID

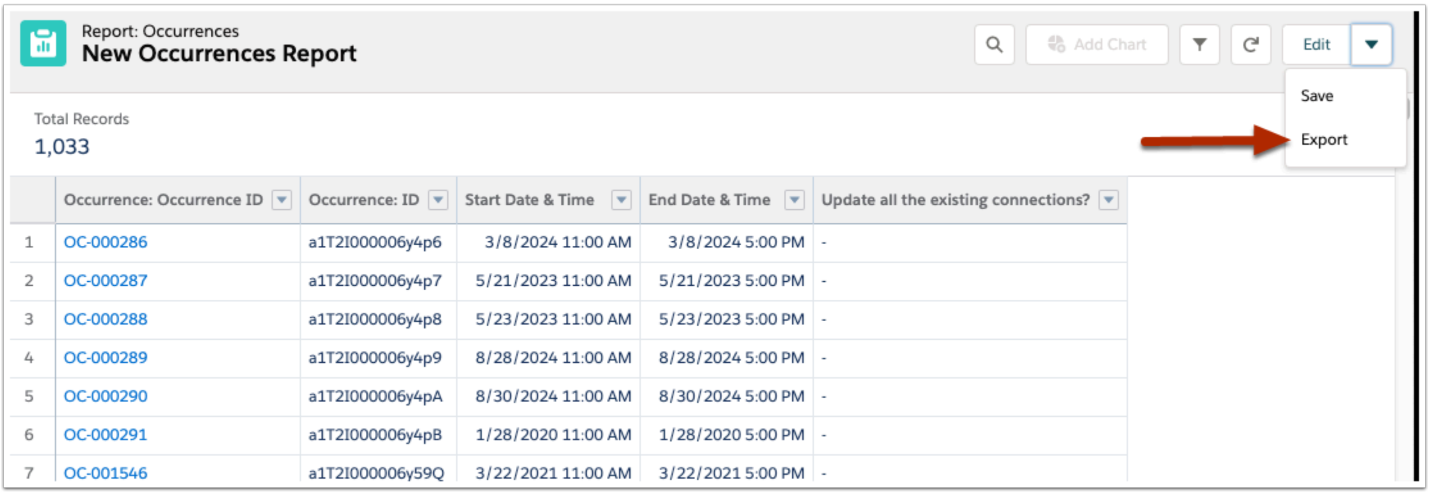
Start Date & Time

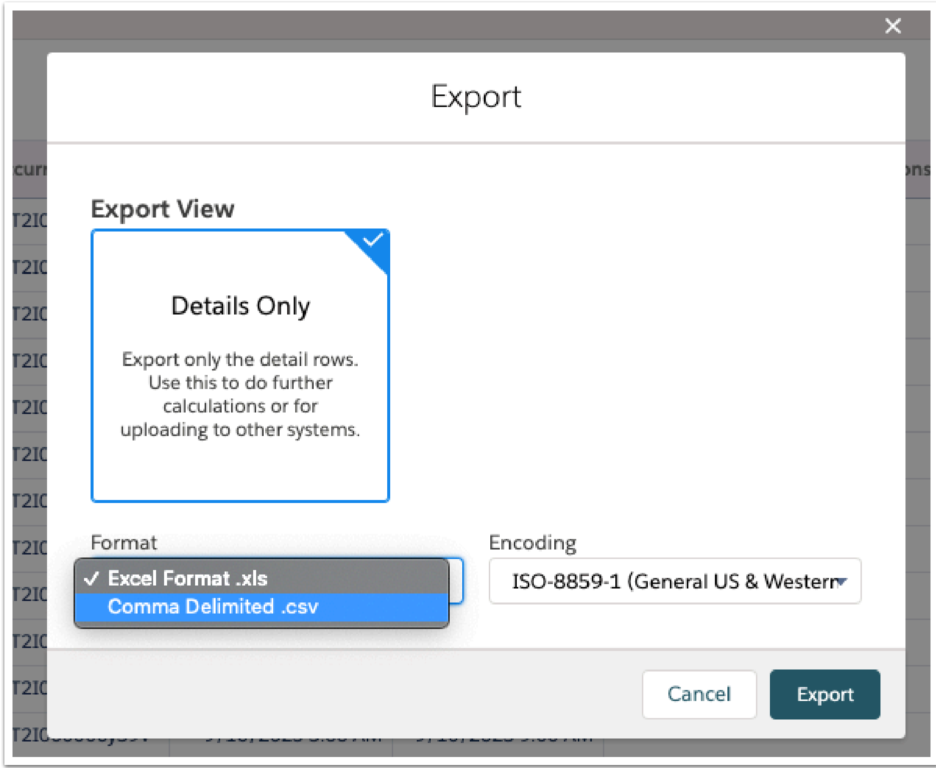
End Date & Time

****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.





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**

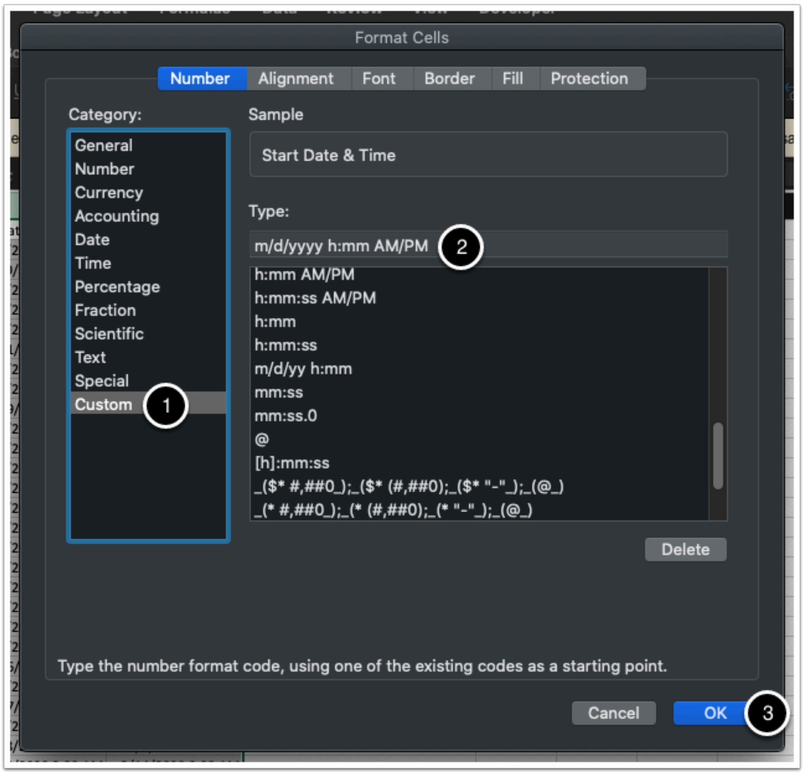
To do this in Excel, follow the instructions below:

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.



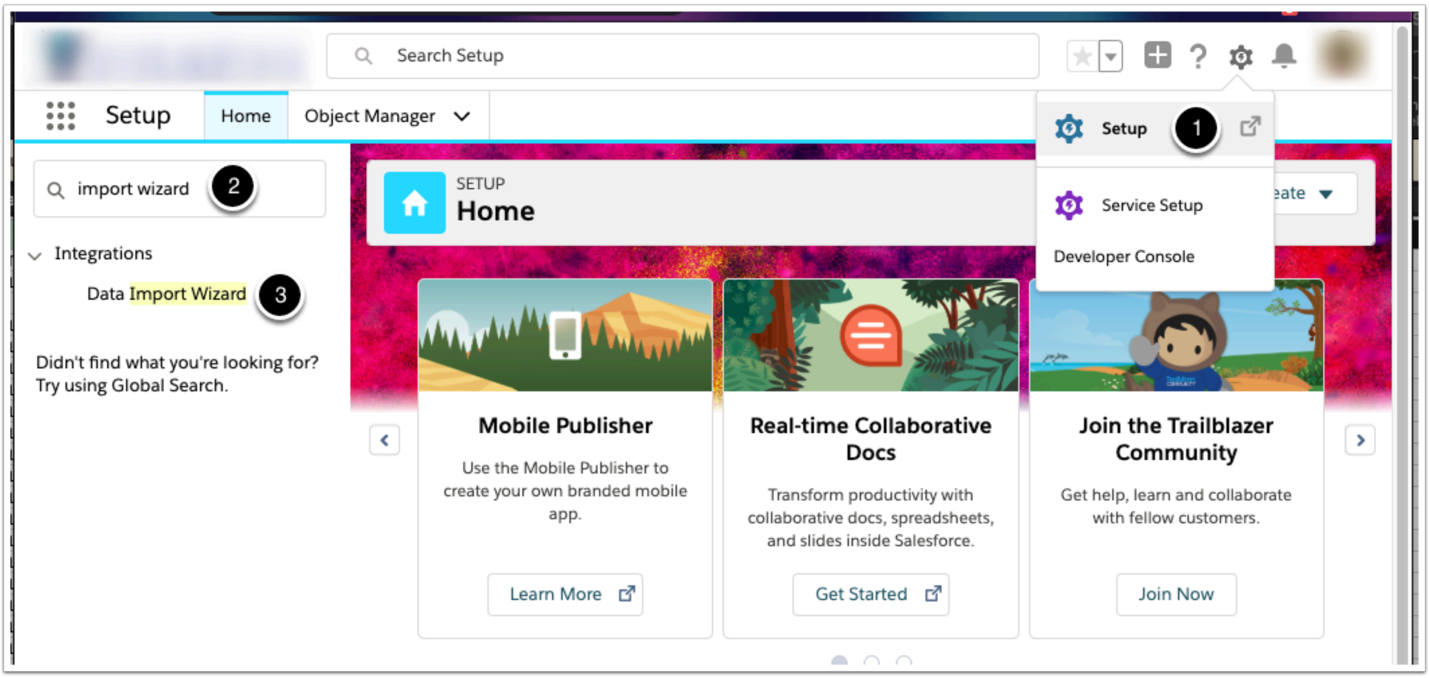
Now save your file and prepare to import the new dates and times.

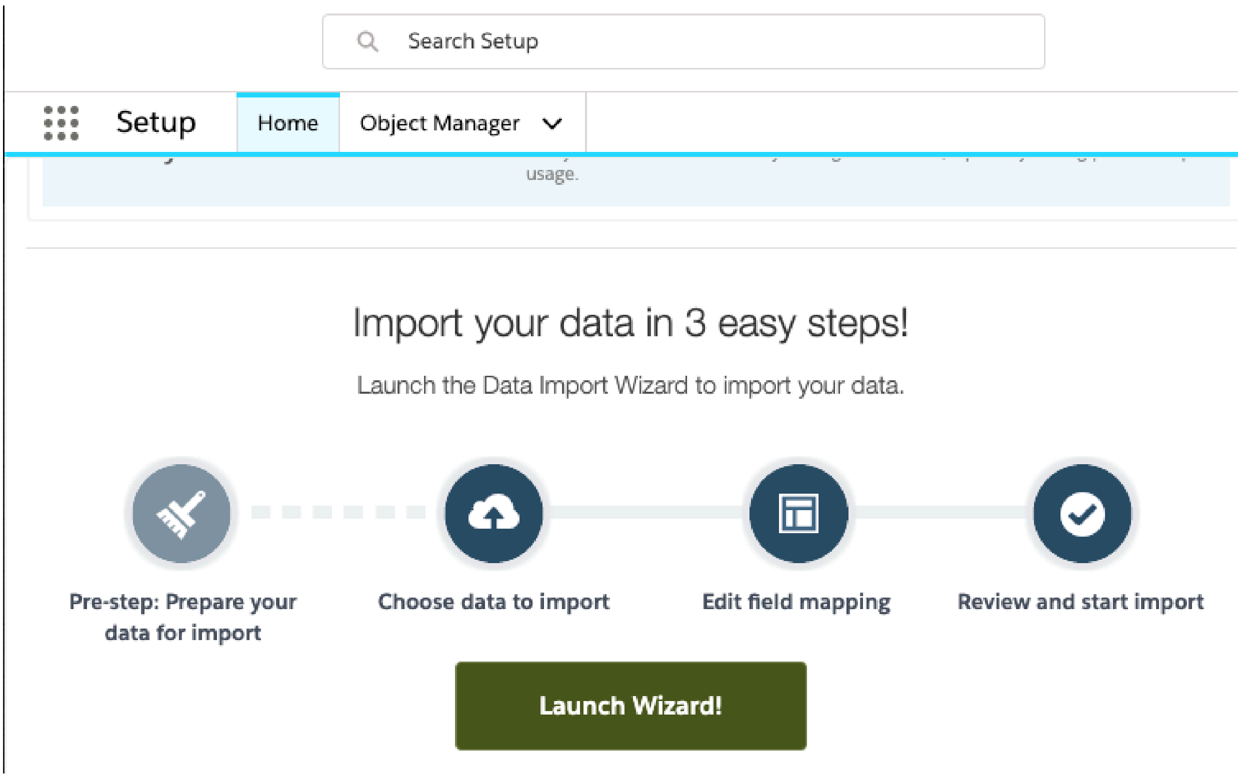
Importing the Updated Data

We will use the Salesforce Import Custom Objects wizard.

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

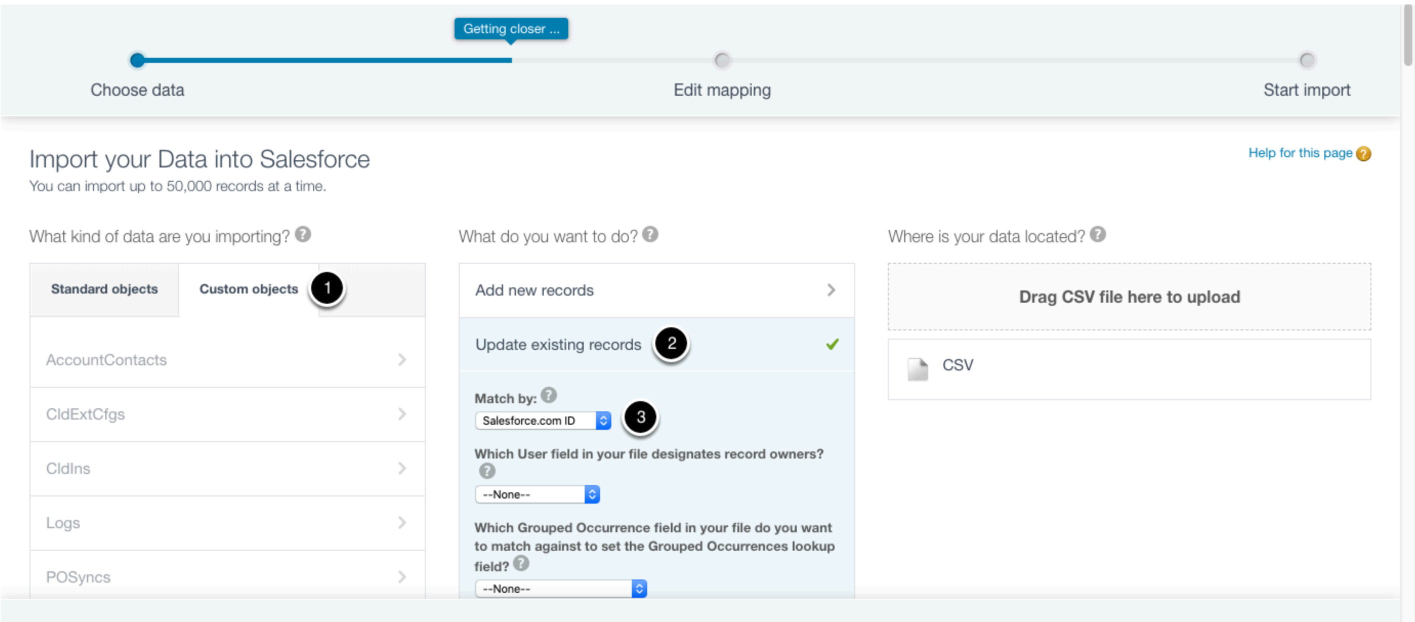
Then click Launch Wizard! to begin.



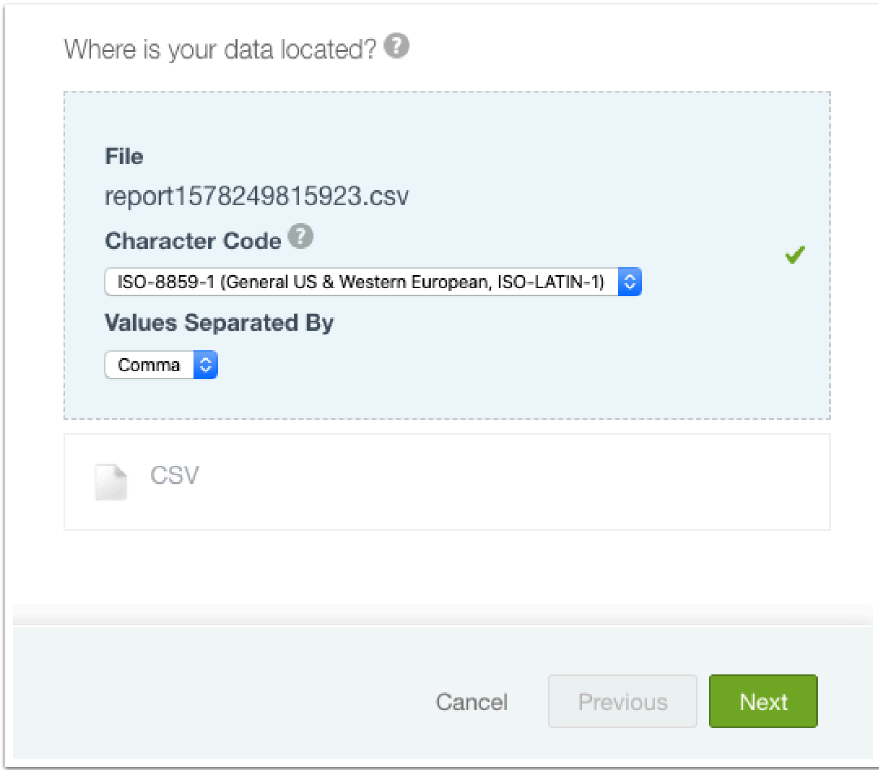


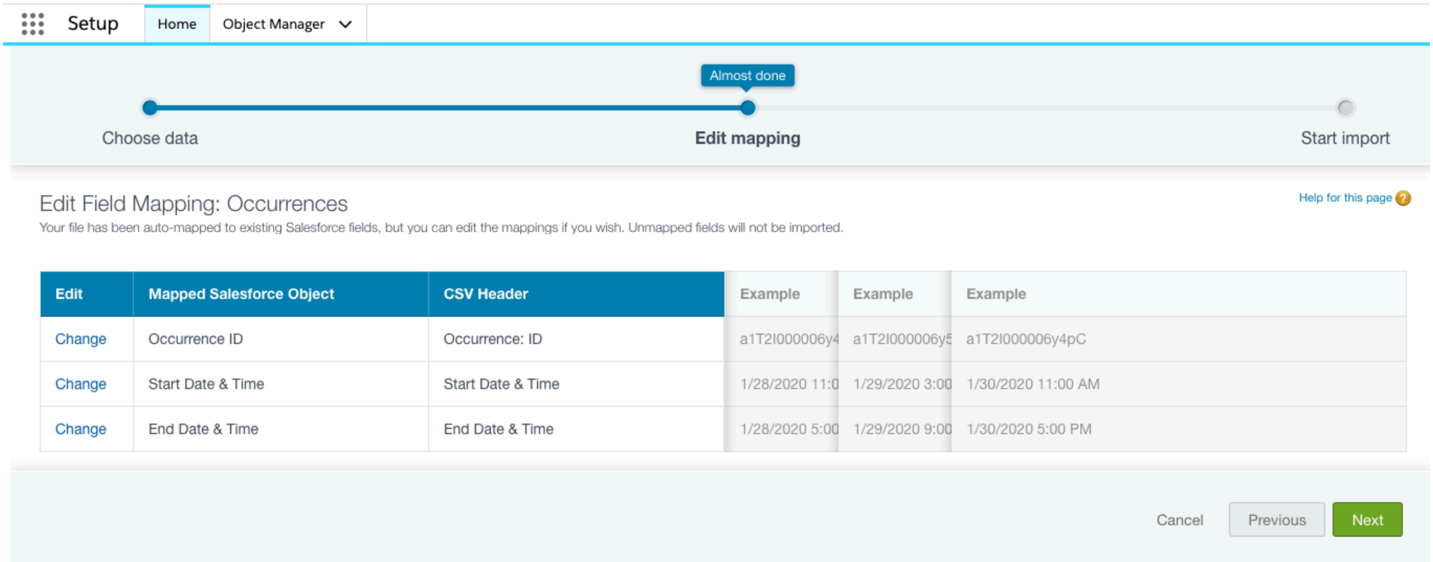
1. Select the Custom objects tab and scroll to the Occurrences object. This list is not in alphabetical order, but in the order they exist in your instance. HandsOn Connect package objects will be grouped together.
2. Select to Update Existing Records
3. Match by Salesforce.com ID (this is the 15- or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

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

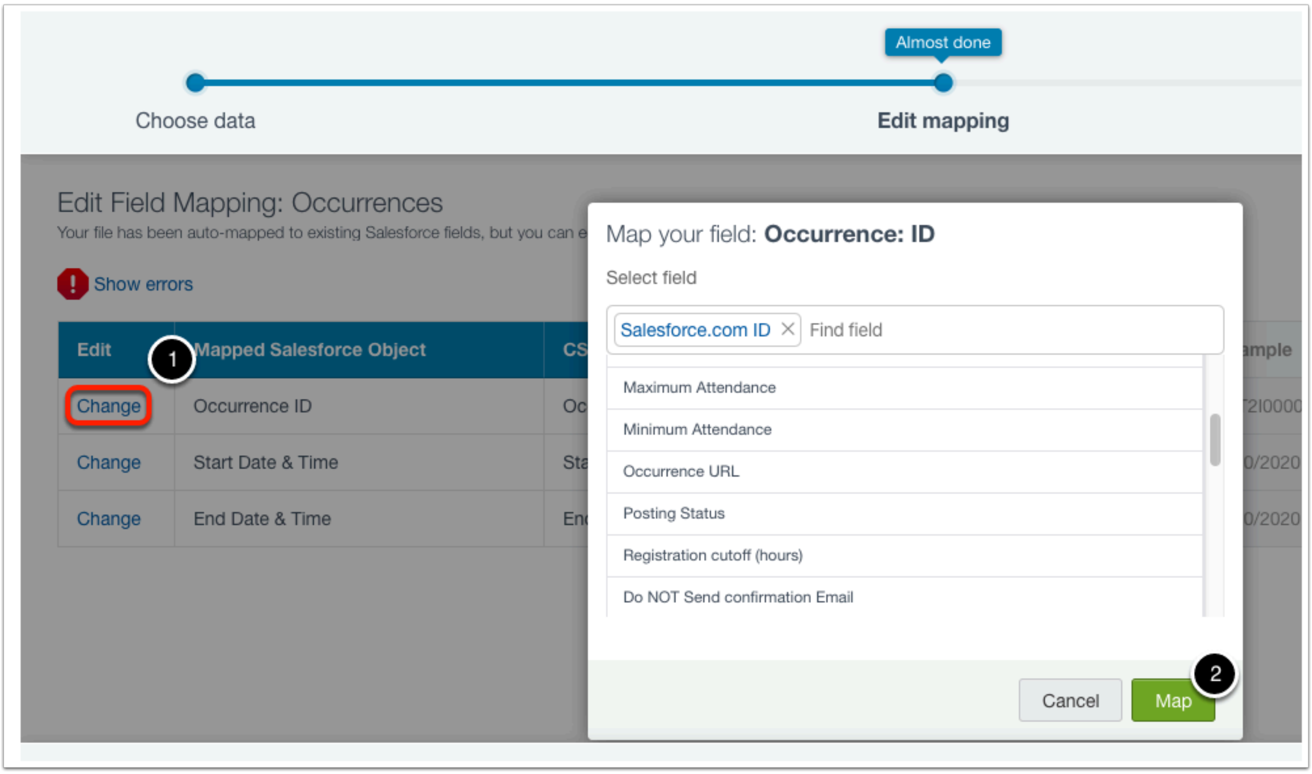


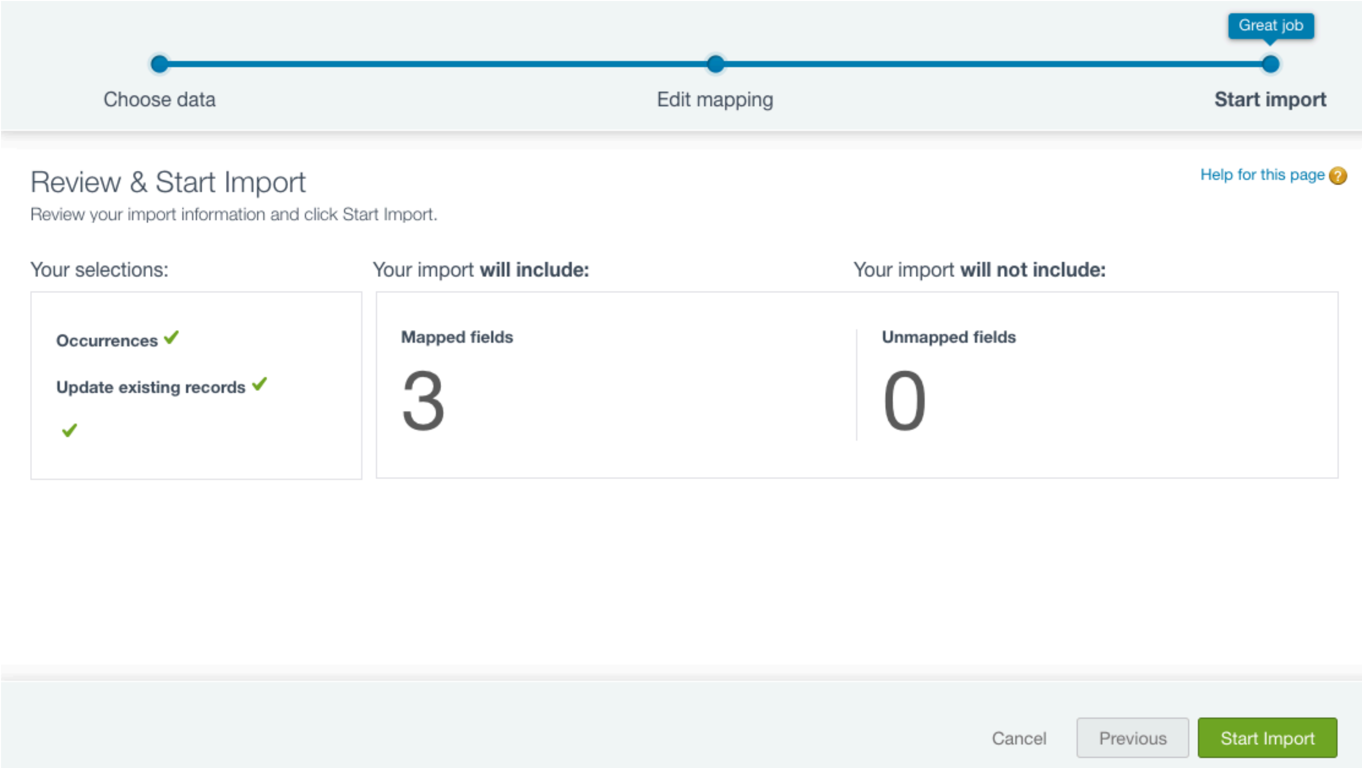
Drop or select your file and click Next to continue to mapping your fields.



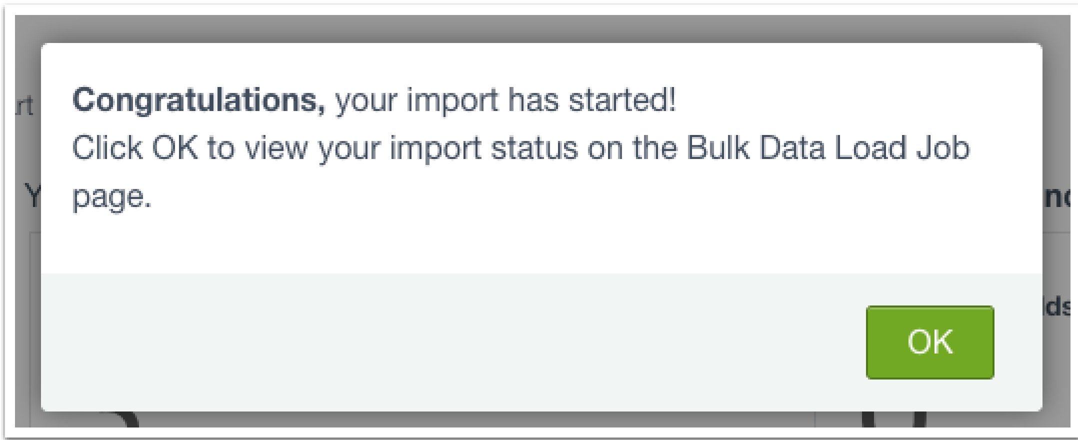


The auto mapping may LOOK perfect, but you must change the Occurrence ID and map it to the Salesforce.com ID. Type in salesforce.com into the Find Field box and be sure to click on the "X" to remove the Occurrence ID mapping. Click Map, followed by Next.

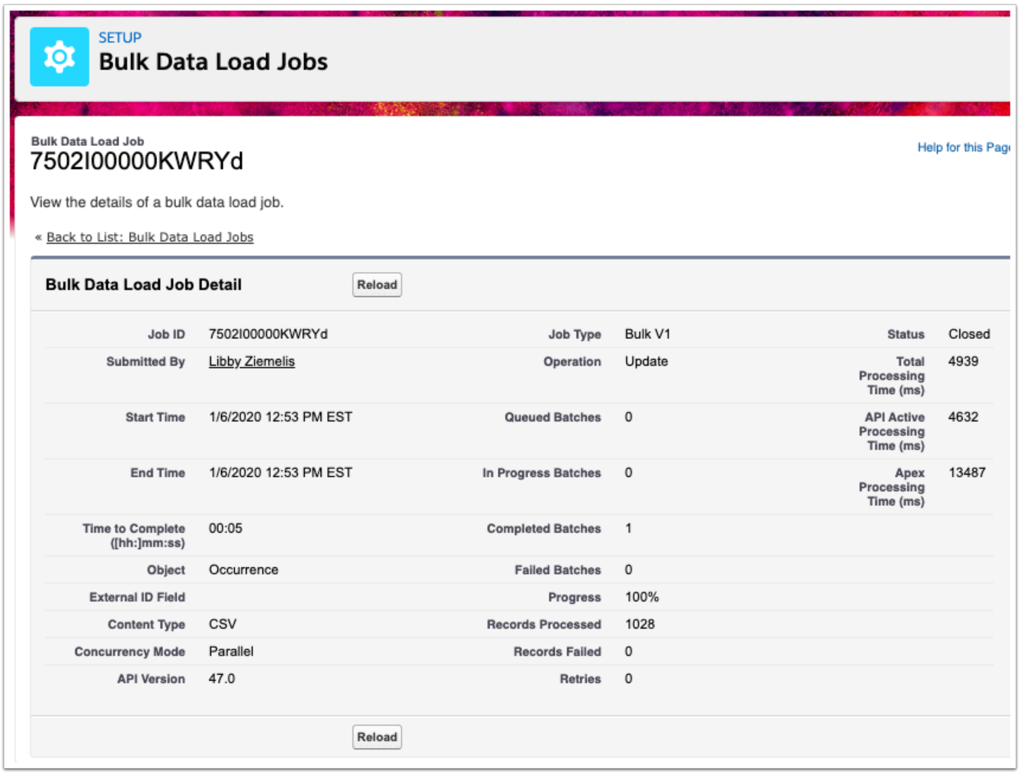




Click on Start Import and you will be greeted with a "Congratulations, your import has started!" window. Click OK and you will be automatically taken to your Bulk Data Load Jobs page where you can see the status of your job.



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

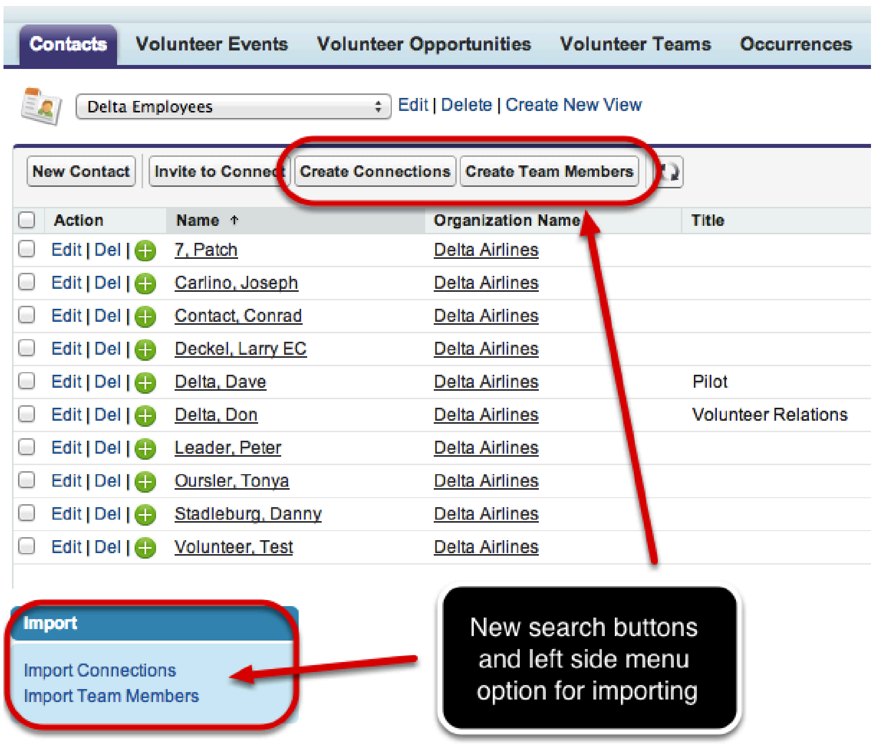
Advanced Data Management Tools for HandsOn Connect

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



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

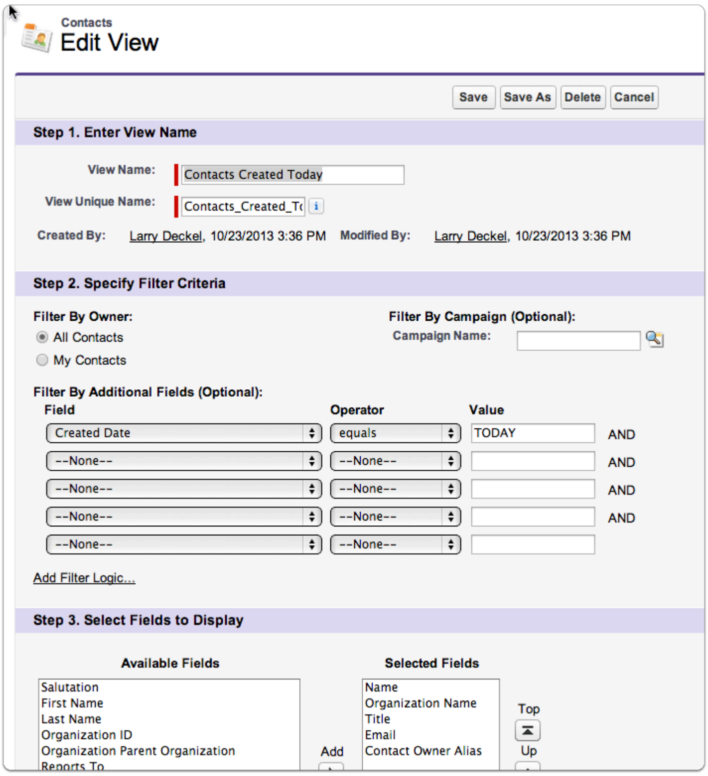
One-Time Preparation:

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!

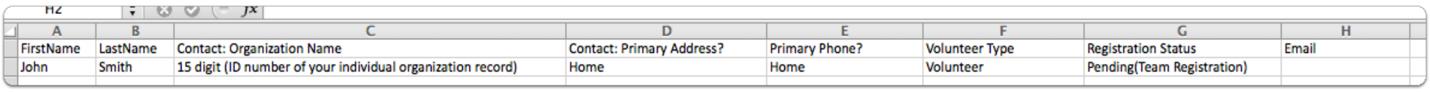
Your system Administrator should have enabled batch create for Team Members and Connections. and given access to you as a user.

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.



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:

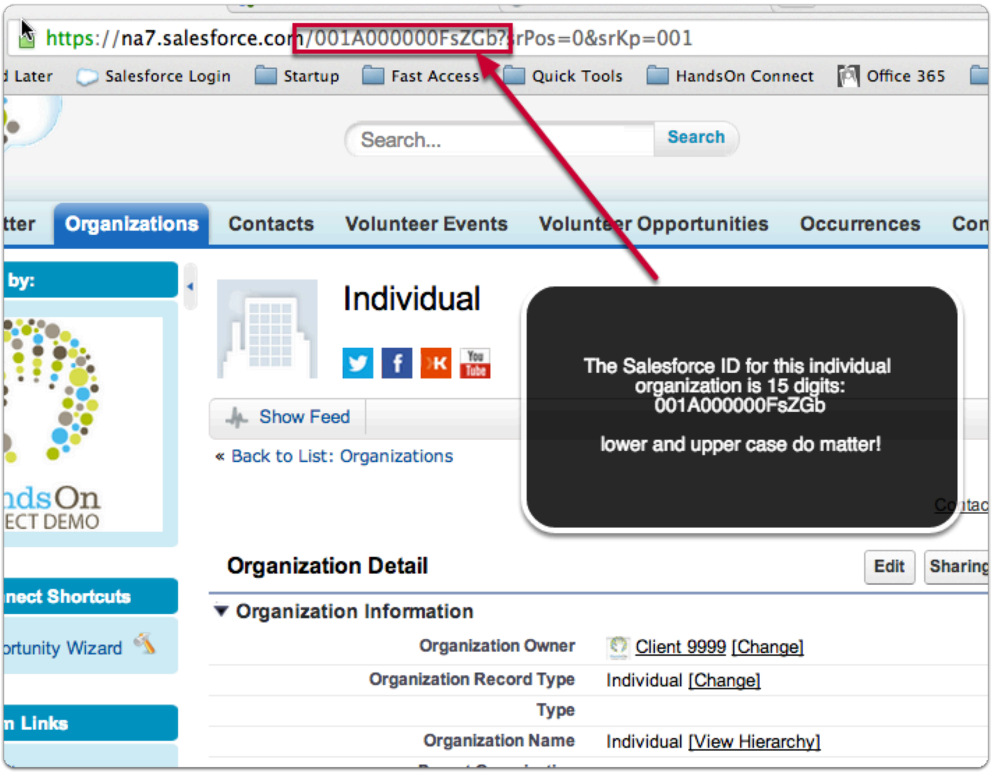
- FirstName
- LastName
- Contact: Organization Name   (which should be the **salesforce ID** for the "Individual" organization (not it's name - since its a lookup field),   (See screenshot below)   [Note: if you have another organization you want to associate these contacts with, a business for example, 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.

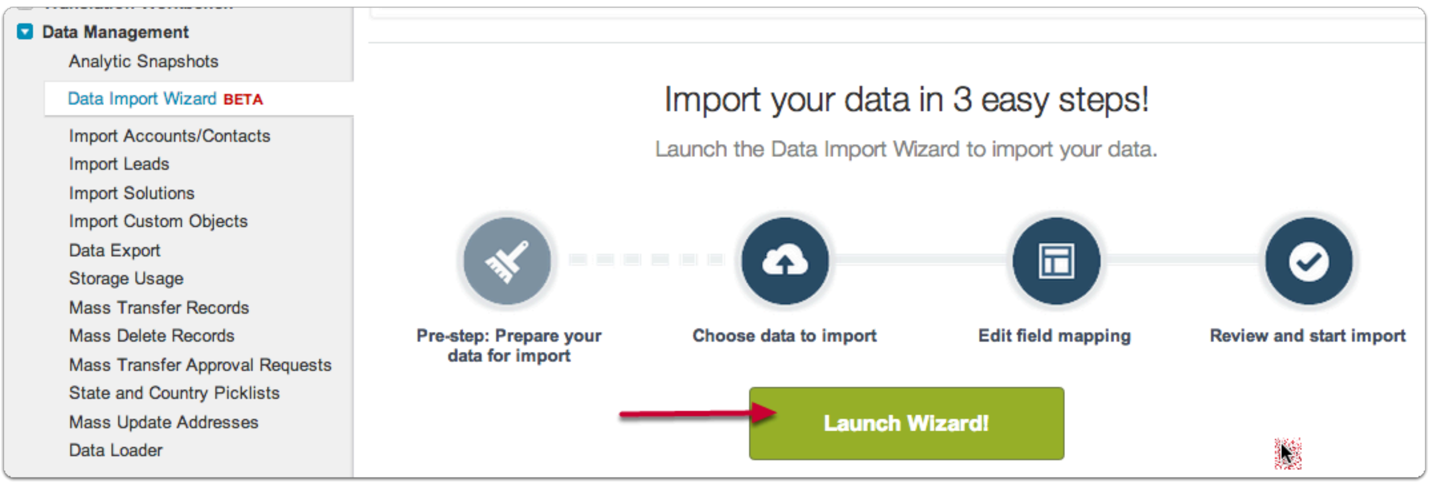
(To use, just update the FirstName and LastName in row 2 and all subsequent rows, and copy the values in columns C through G to all rows.)

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"



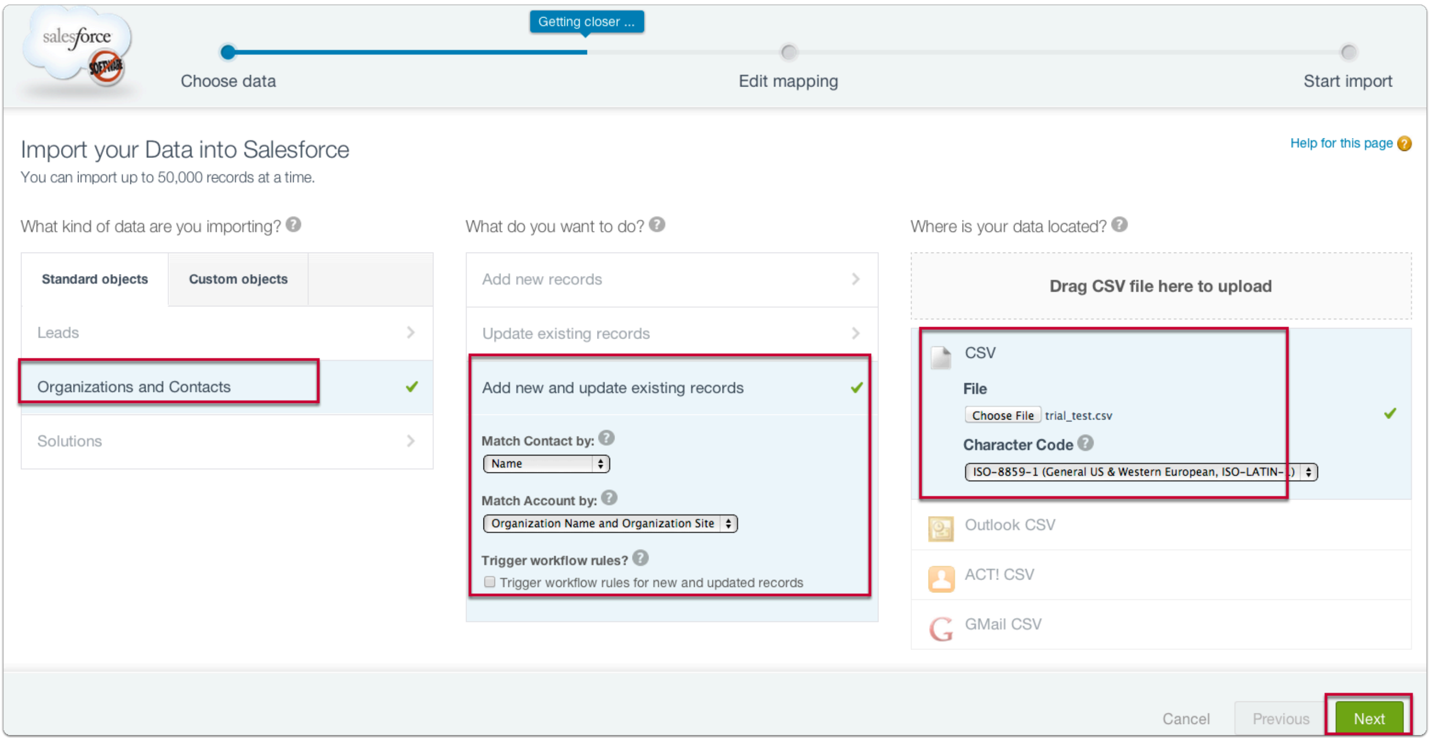
What kind of data are you importing: Organizations and Contacts

What do you want to do?: Add new and update existsing 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

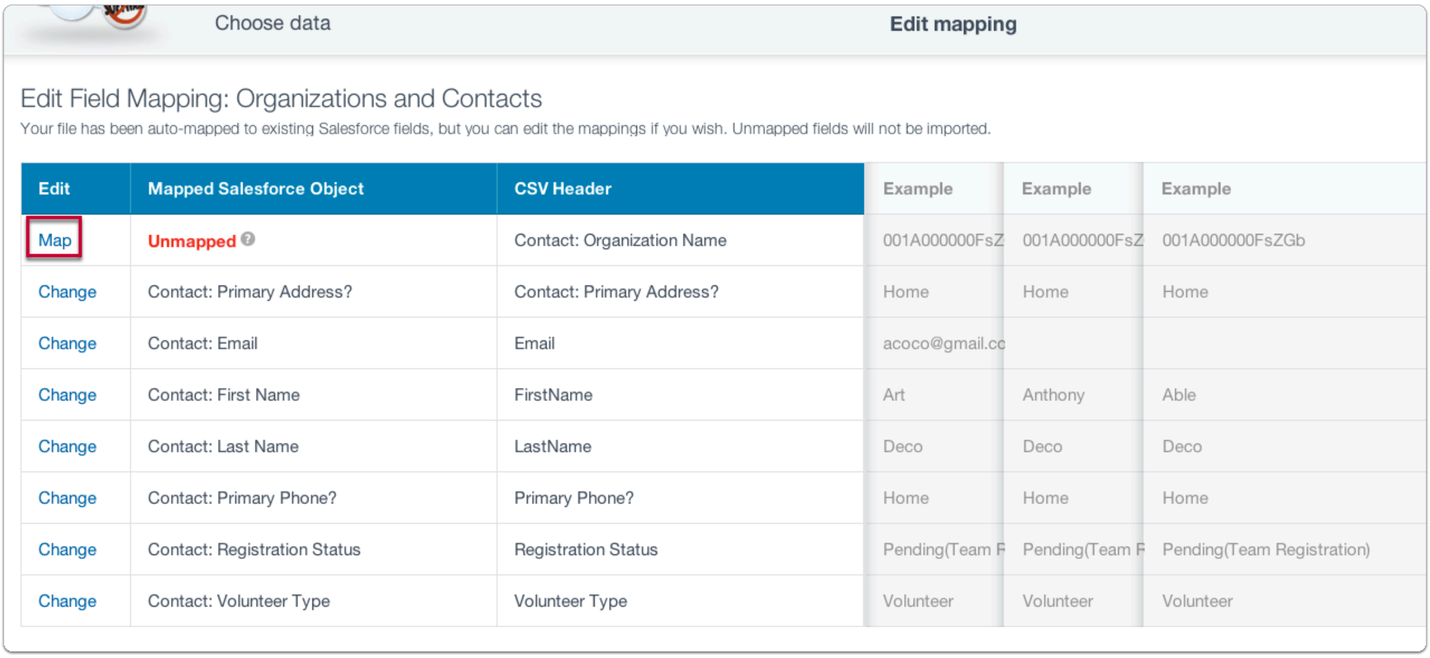


Edit Field Mapping:

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

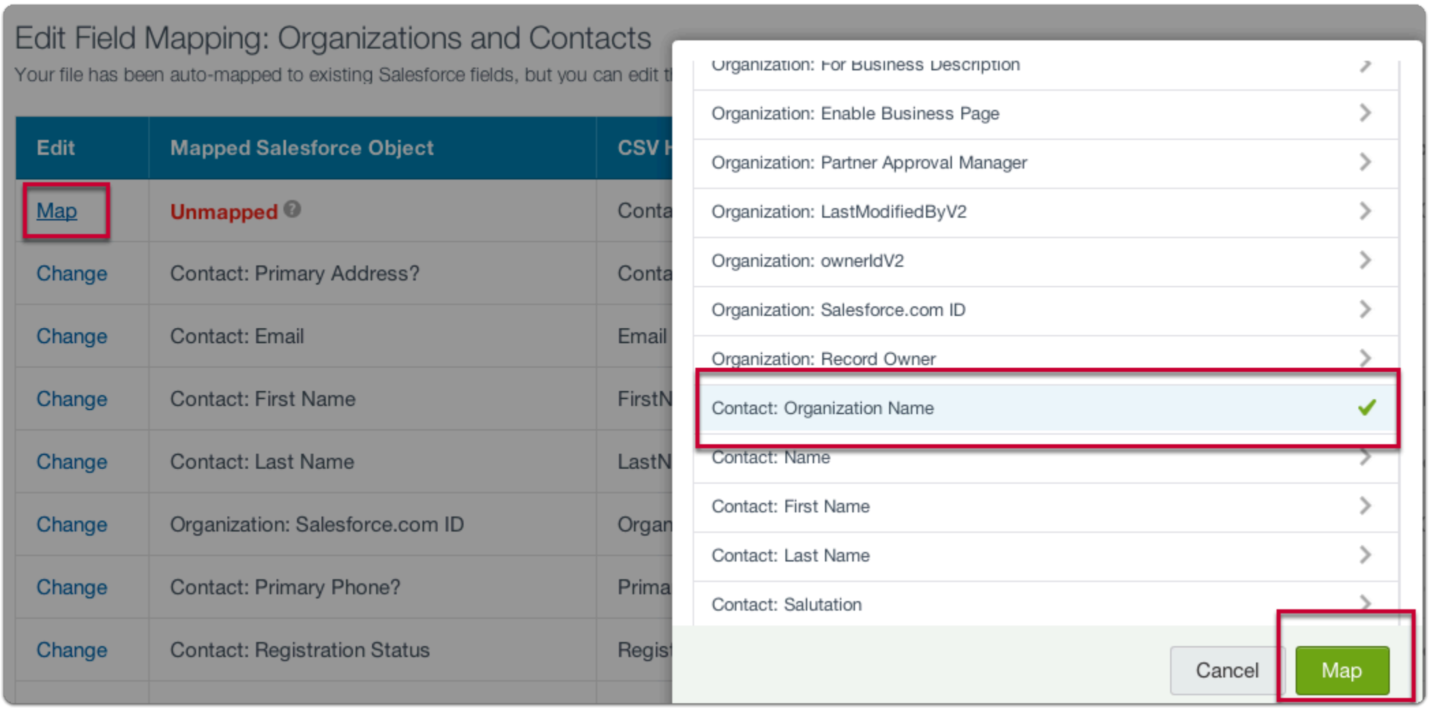
Edit Field Mapping: Organizations and Contacts

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.

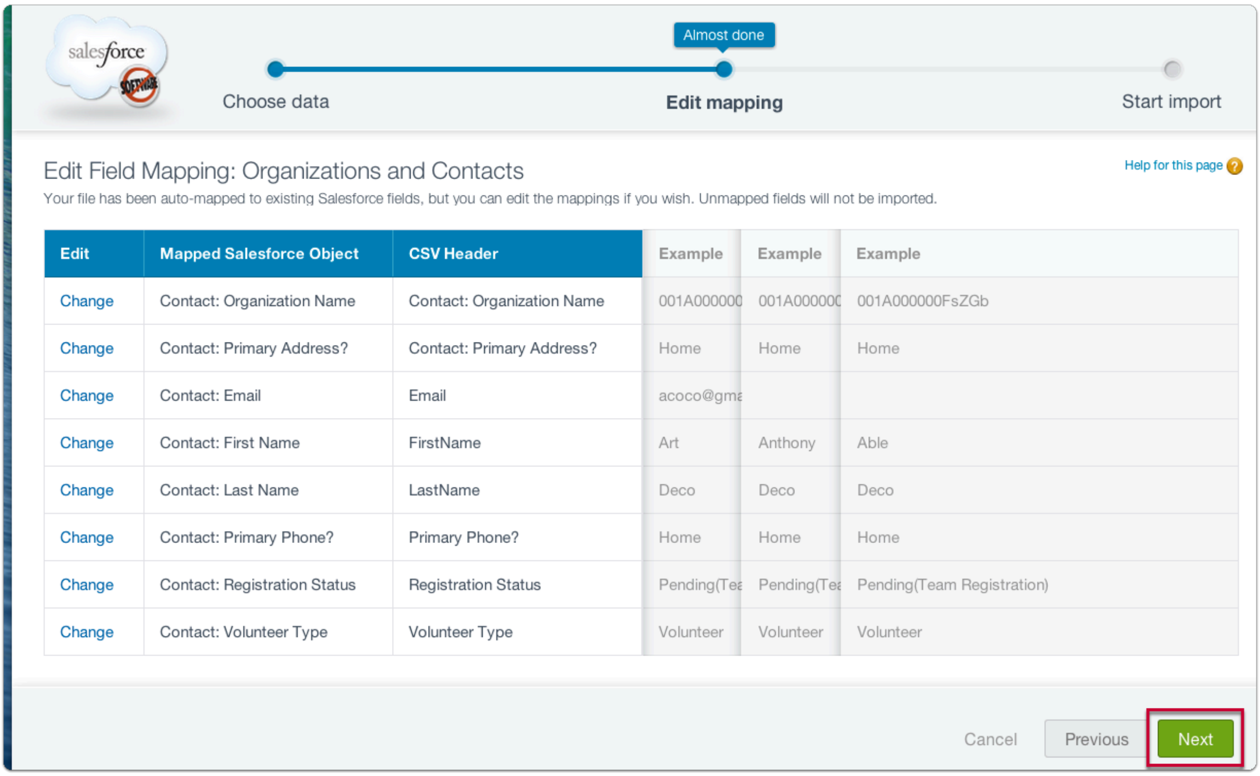
Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Map	Unmapped	Contact: Organization Name	001A000000FsZ	001A000000FsZ	001A000000FsZGb
Change	Contact: Primary Address?	Contact: Primary Address?	Home	Home	Home
Change	Contact: Email	Email	acoco@gmail.cc		
Change	Contact: First Name	FirstName	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(Team F	Pending(Team F	Pending(Team Registration)
Change	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.



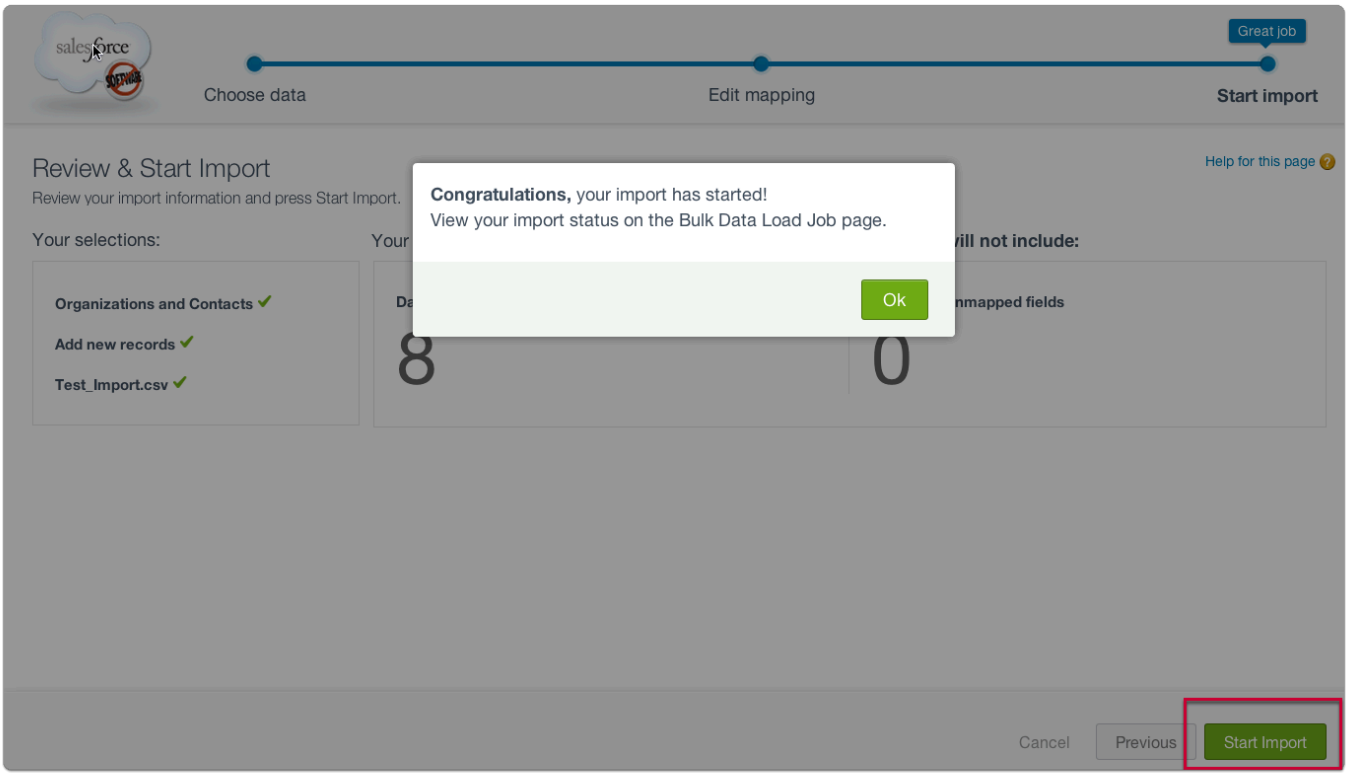
Now that everything is mapped - click on 'next'



Review and Start Import

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

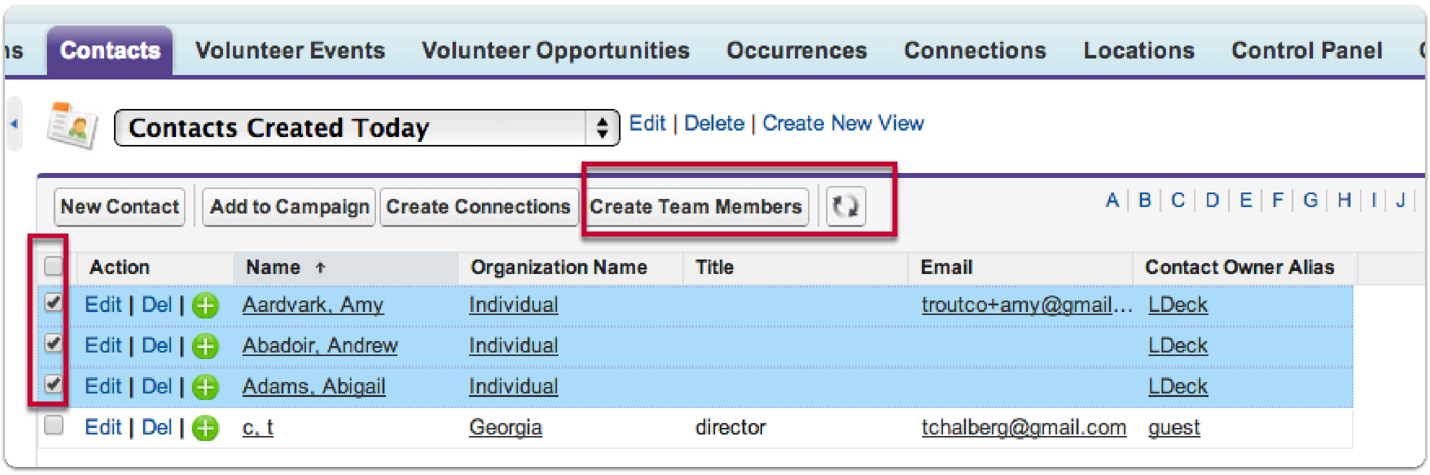
You'll automatically be taken to the Bulk Data Load Job Detail page where you can monitor the results of your import. (Click on "View Result" to see if you have any errors and your import succeeded.)



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 witha 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 :-)

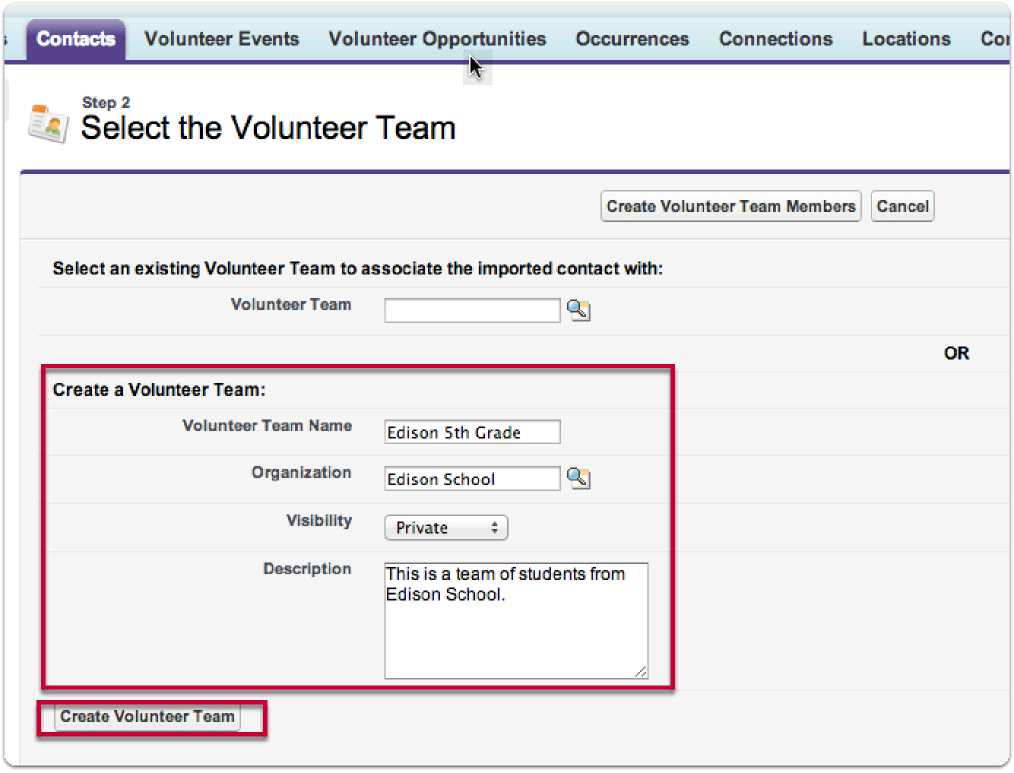
Click on the Create Team Members button.



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.

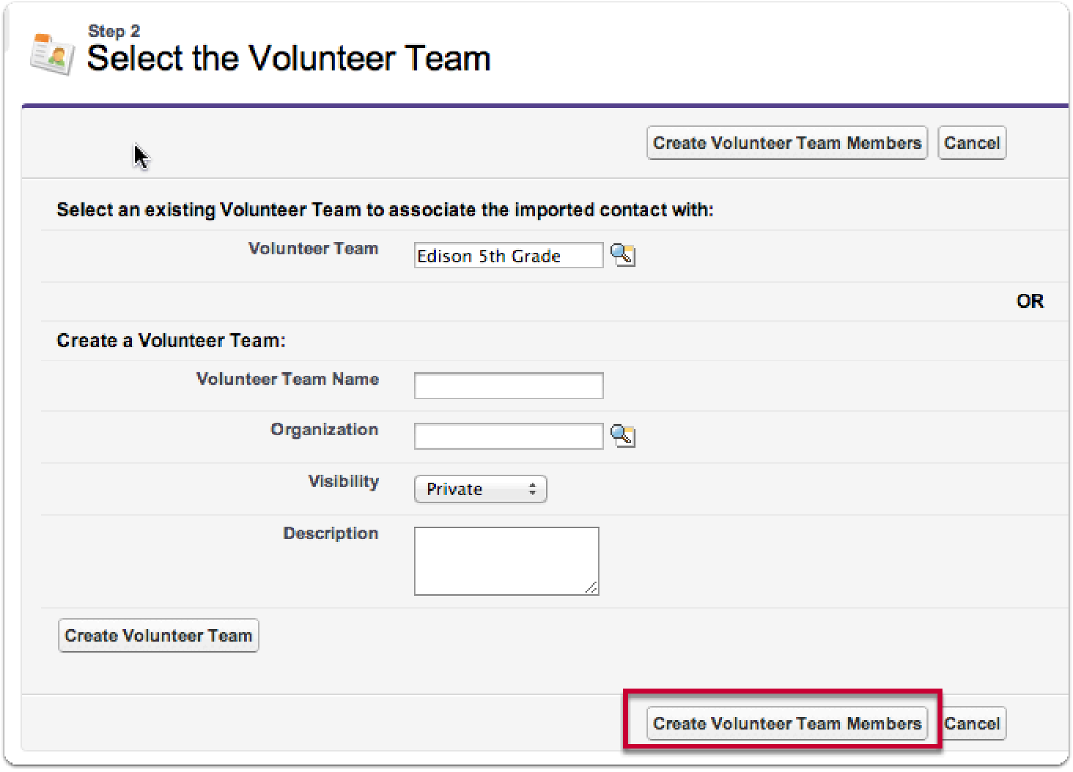
The Organization optional - but if you want the team to be associated with an existing organization in the database you can add that info here.

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



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

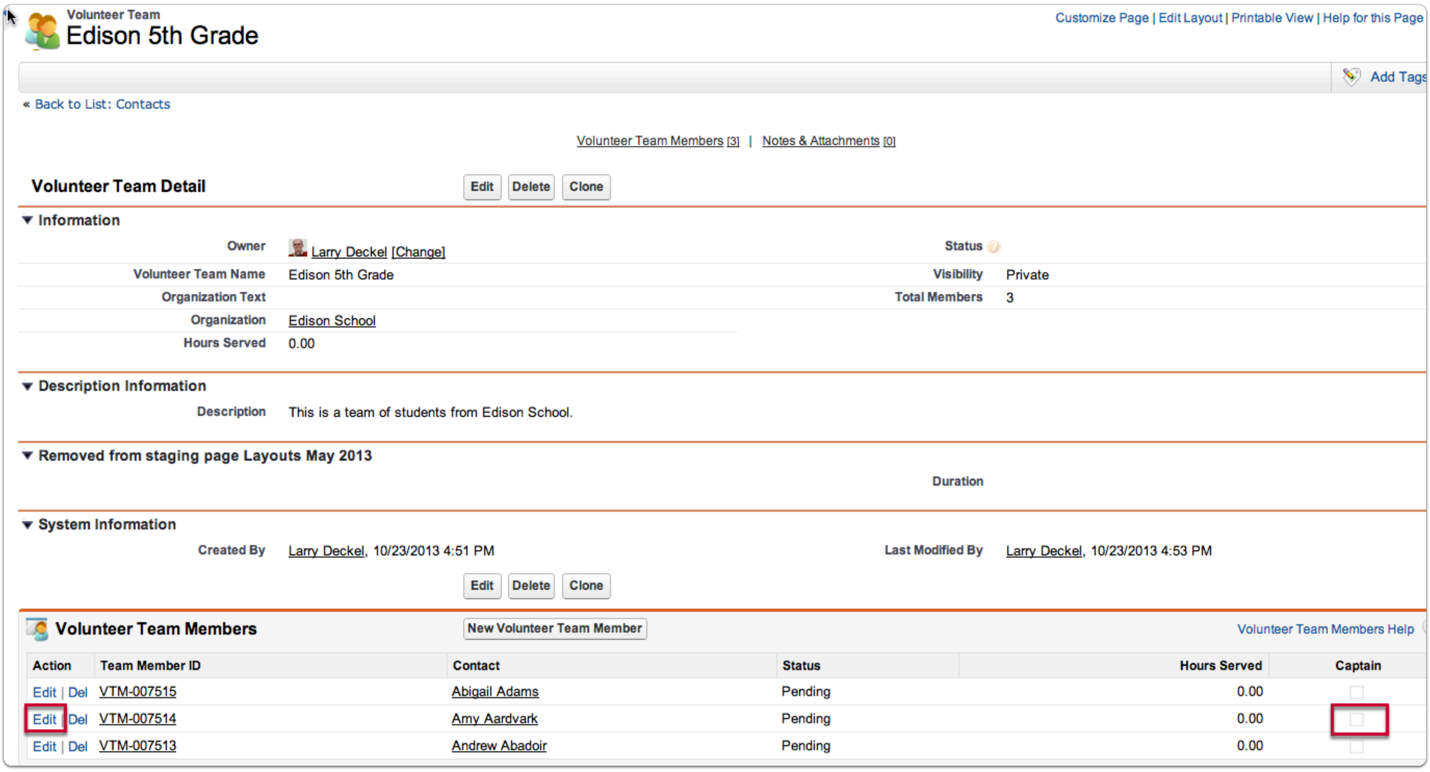
Create the team members by clicking the Create Volunteer Team Members button.



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

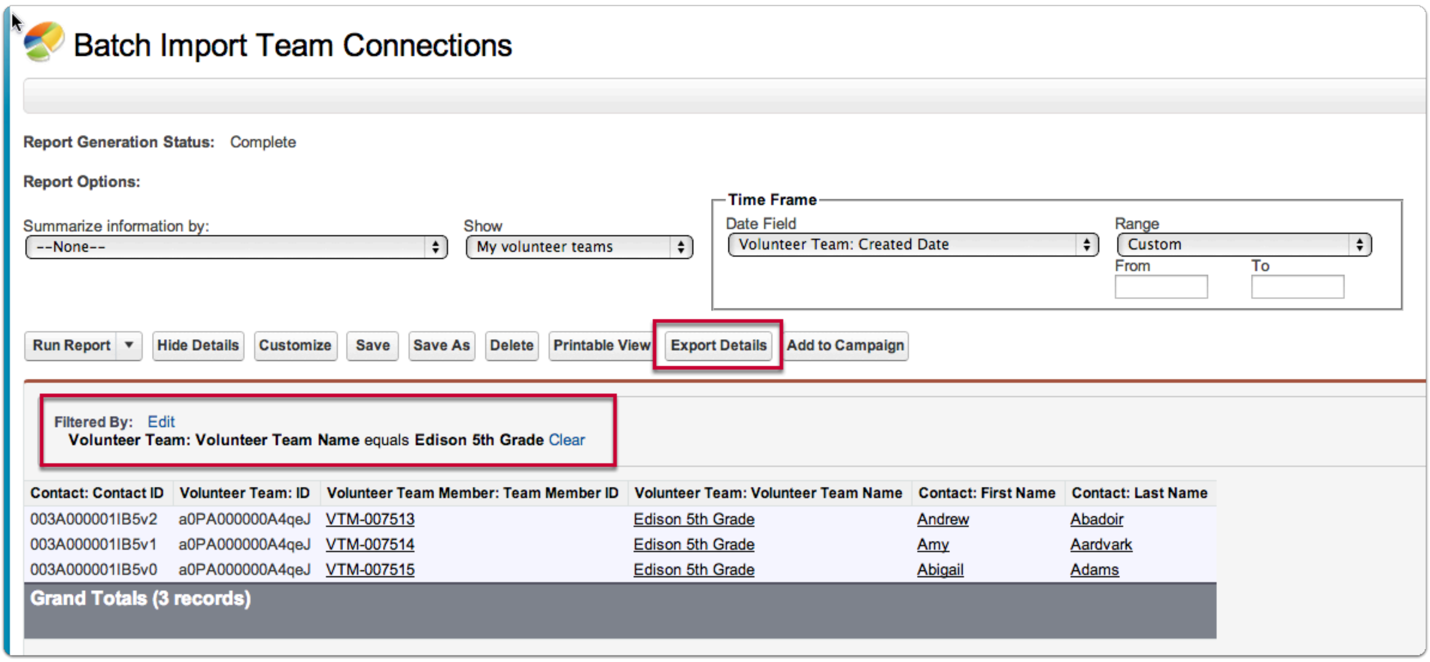
Note: They MUST have an email address associated with their contact record if you make them a team captain. You then should encourage them to register on the public site with the same email address so they can actually manage the team.

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

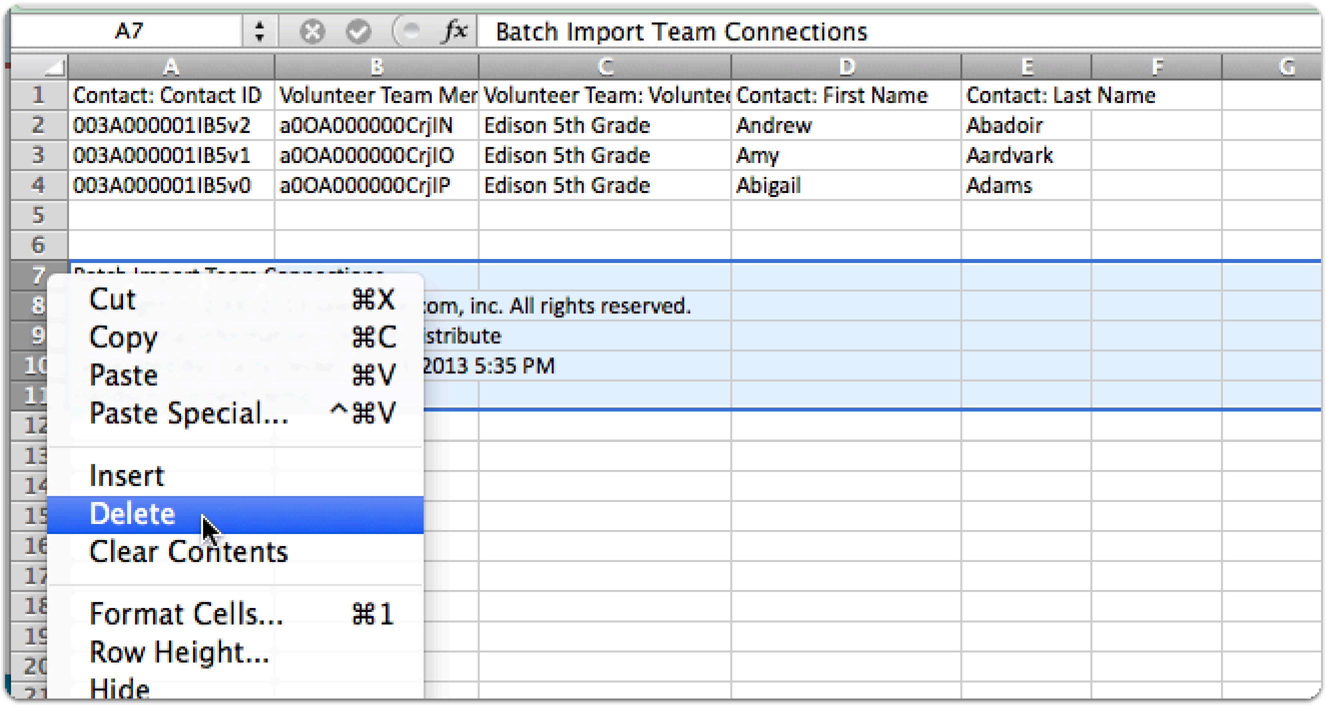


Step 4: Run and export the report needed to import connections for team members and save as a .csv file.

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.

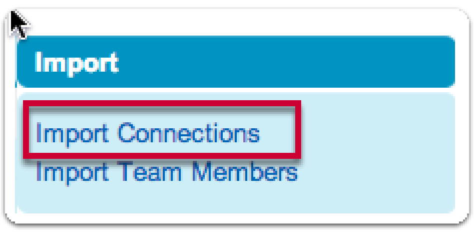


Remove the footer on the .csv file, and save.



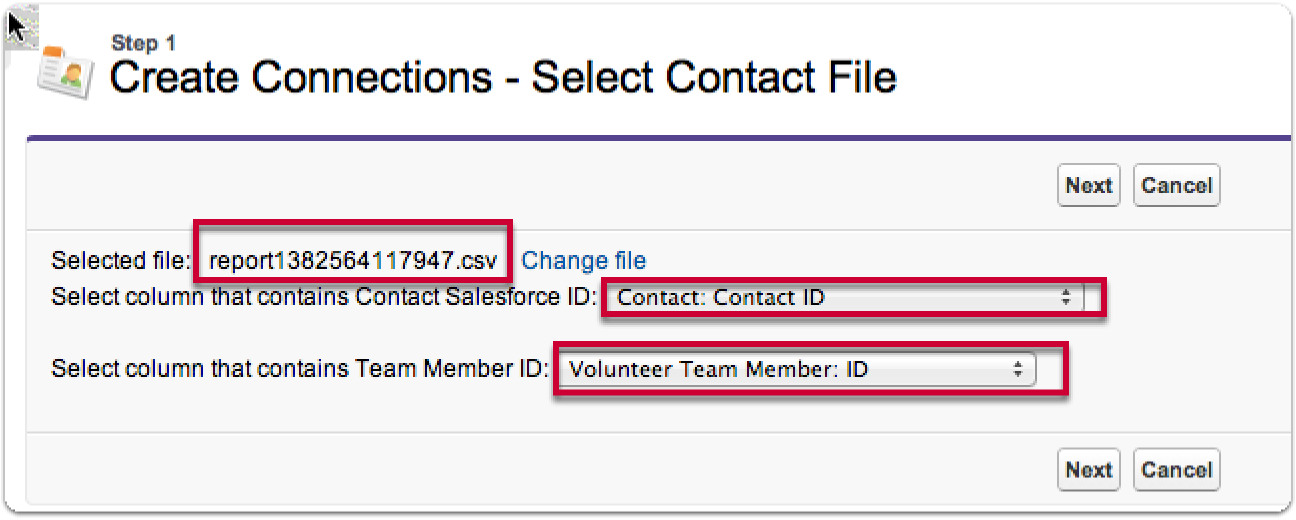
Step 5: Import the connections

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



First

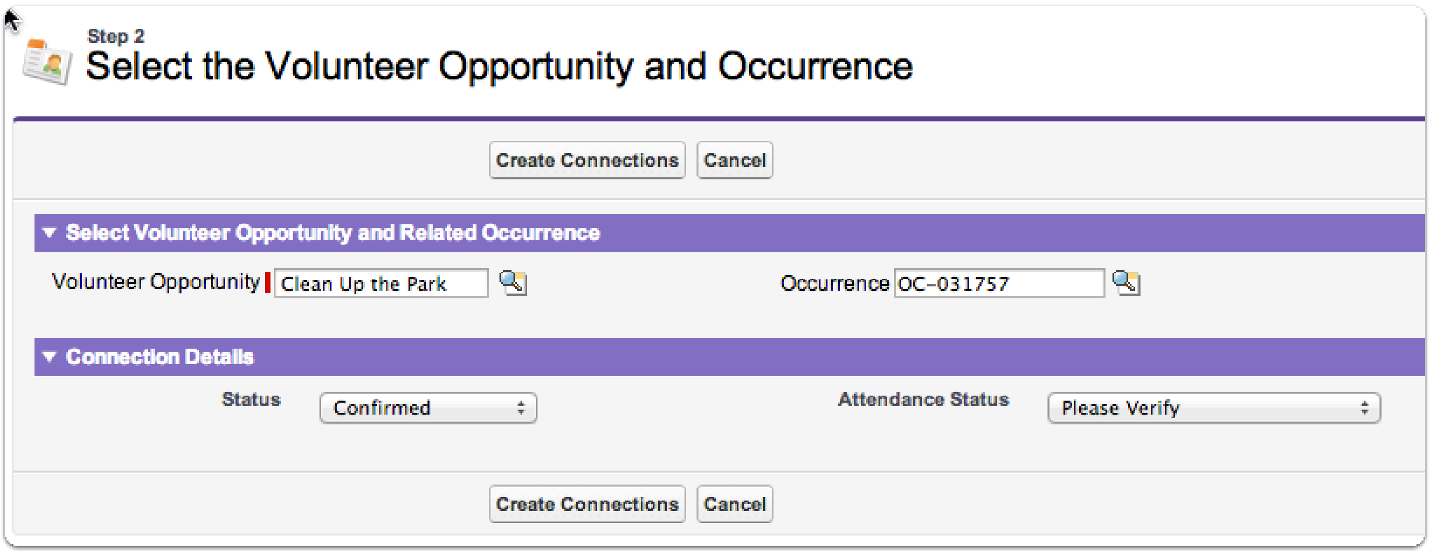
Upload the file and select the column containing the Contact ID and the Team Member ID. Click Next



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.

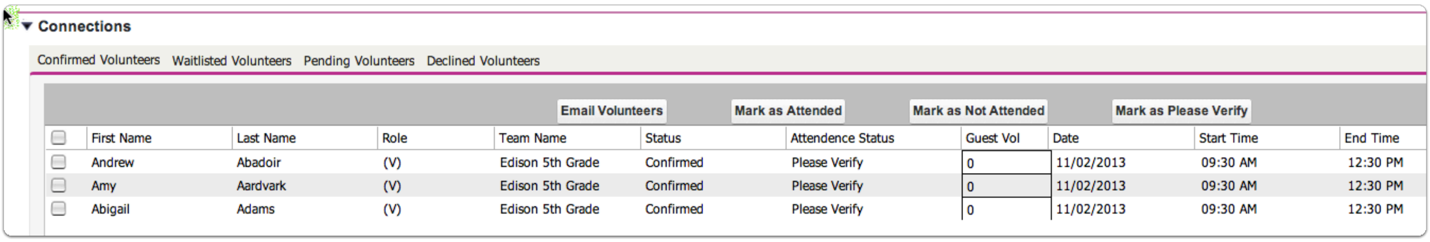


You did it!

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.



(Advanced) Batch Creating Team Members

There are two ways to batch add team members:

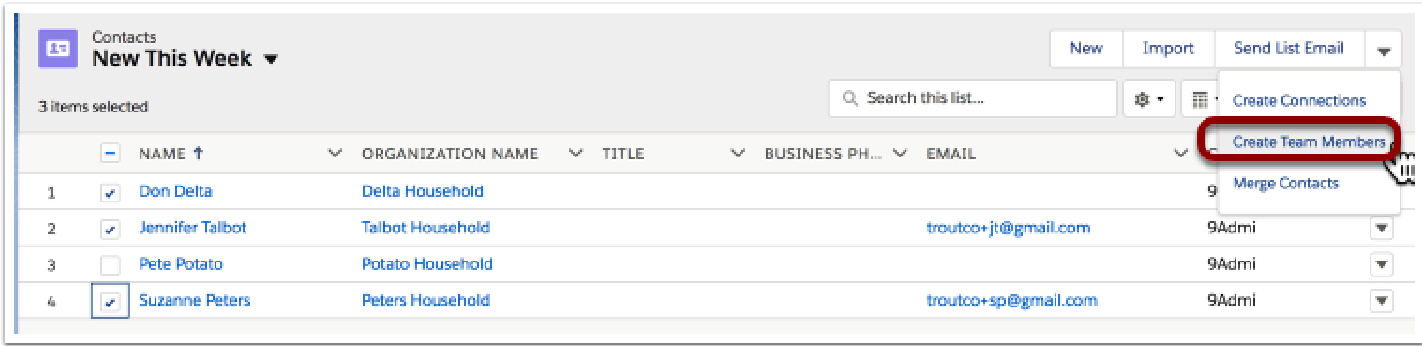
Both of these methods require your system administrator to activate these features.

Method 1: Create Team Members from a contact list view

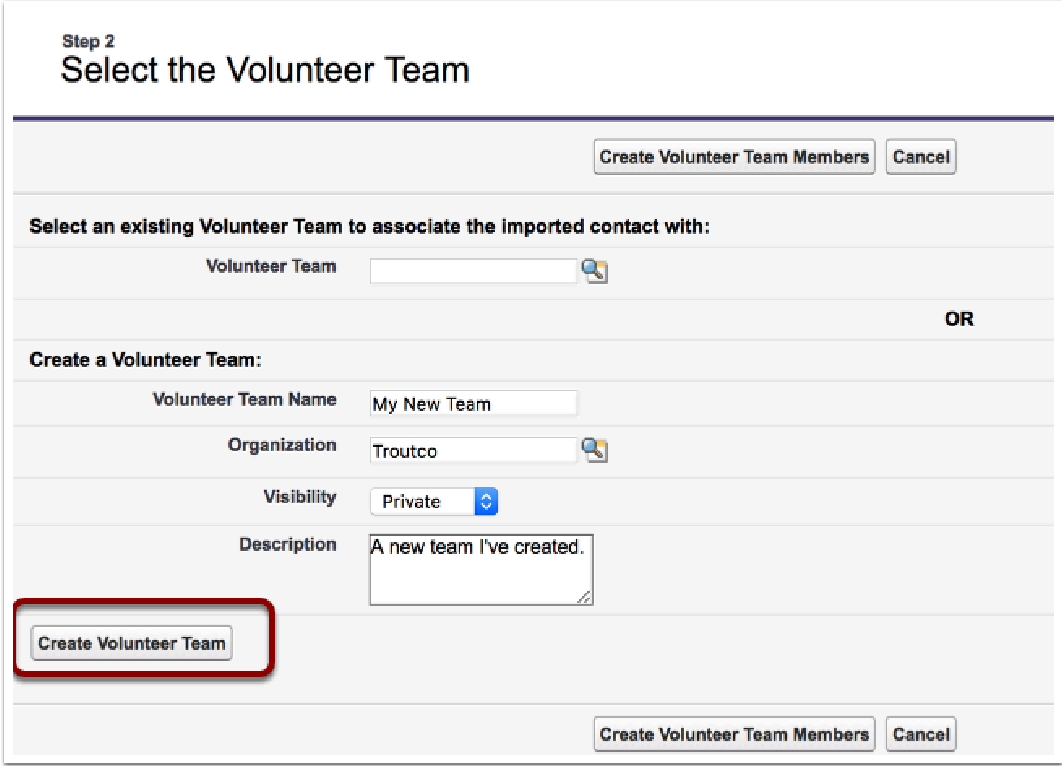
Go to the Contacts Tab, and select any list view (other than "Recently Viewed Contacts". You may want to create a view that gives you the contacts you want to add to a team.

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"

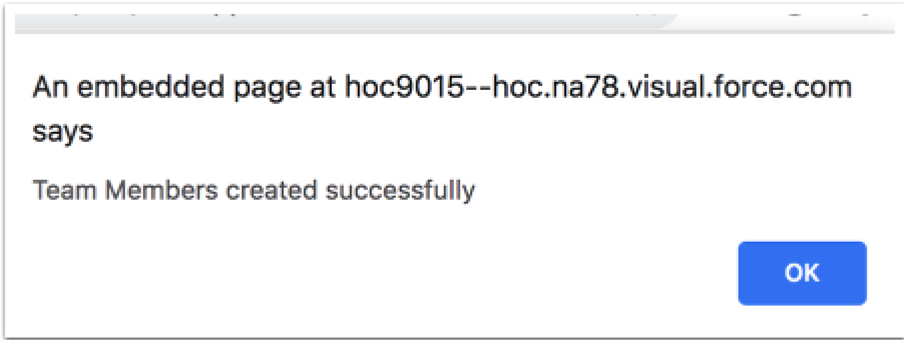


You'll have an option to select an existing team, by using a look-up (if you've already created the team), OR to create a new volunteer team.



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

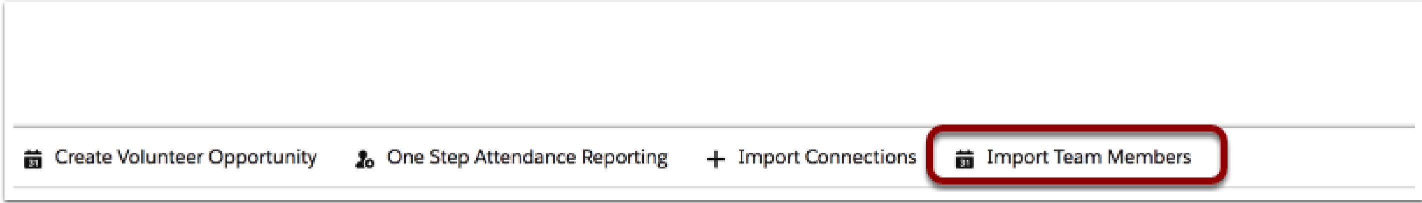
If you are creating a new volunteer team - click on "Create Volunteer Team" - then your new team will automatically be populated in the look field 'Volunteer Team" -- NOW click "Create Volunteer Team Members"



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:

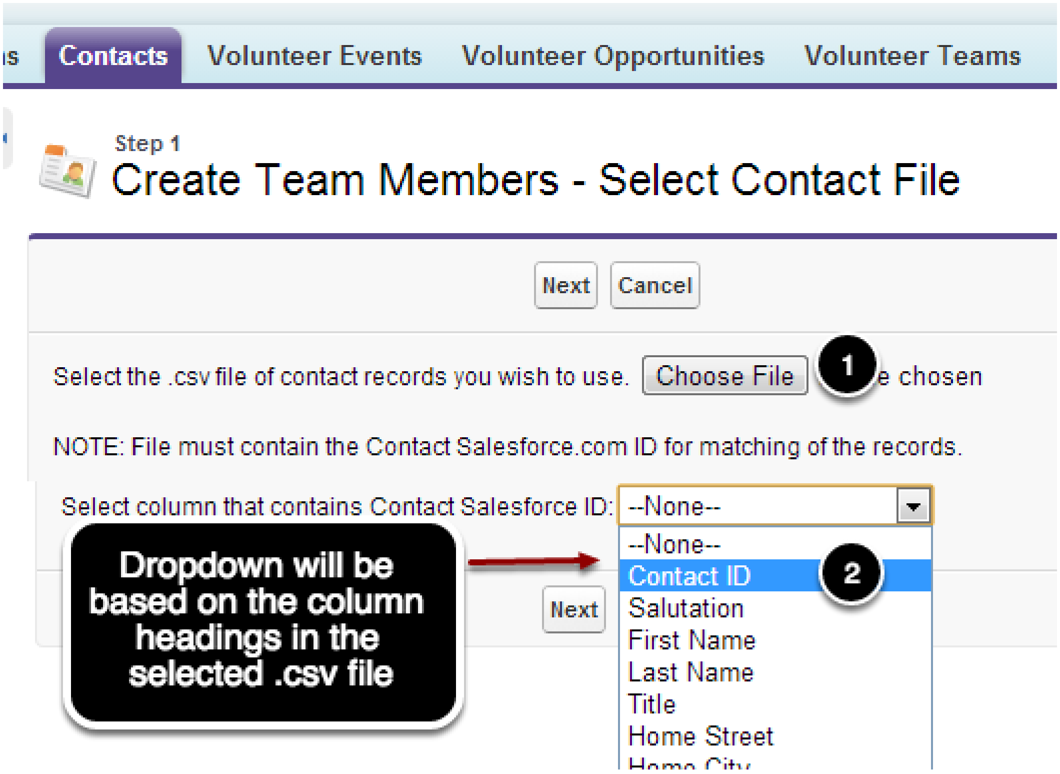


In the method - you'll need to prepare a speadsheet of data to import. You can get the relevant info you need by running a report on the contacts you wish to import.

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.

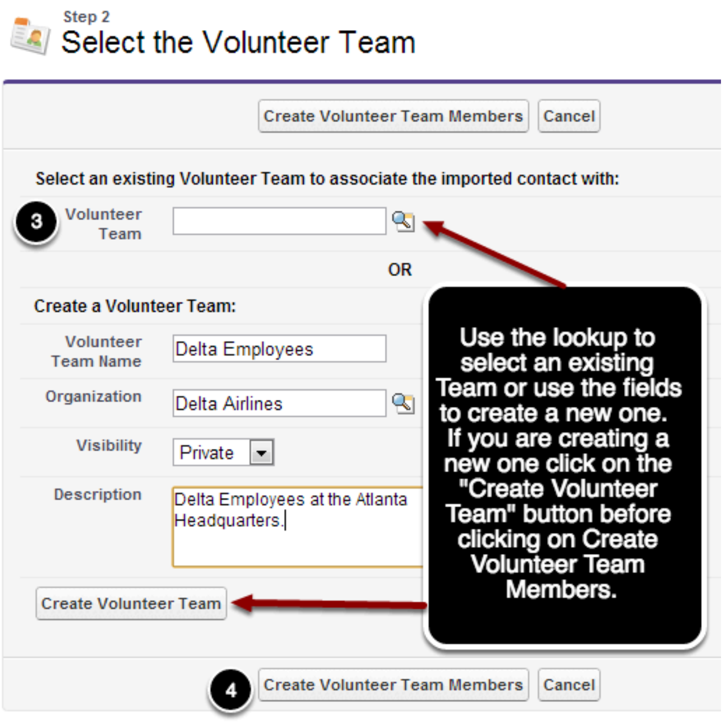
Importing Team Members - Step 1

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.



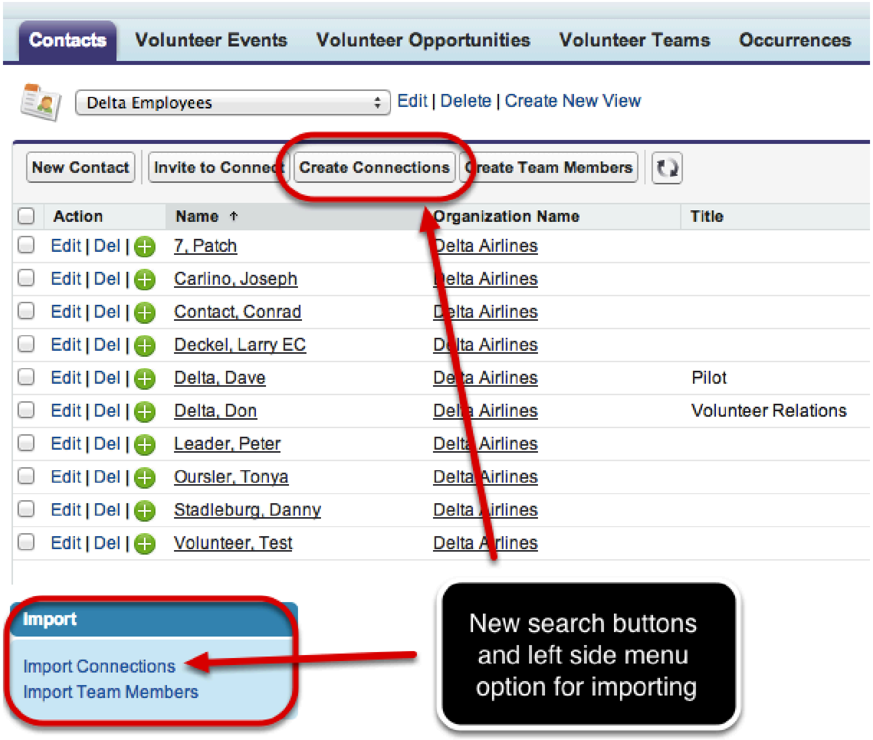
Importing Team Members - Step 2

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


Step 2
Select the Volunteer Team
Create Volunteer Team Members
Cancel
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.
Create Volunteer Team
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.
4
Create Volunteer Team Members
Cancel

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.

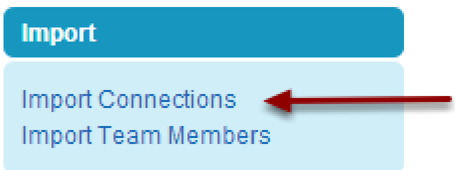
See this post for instructions on creating a basic report to use for this purpose.

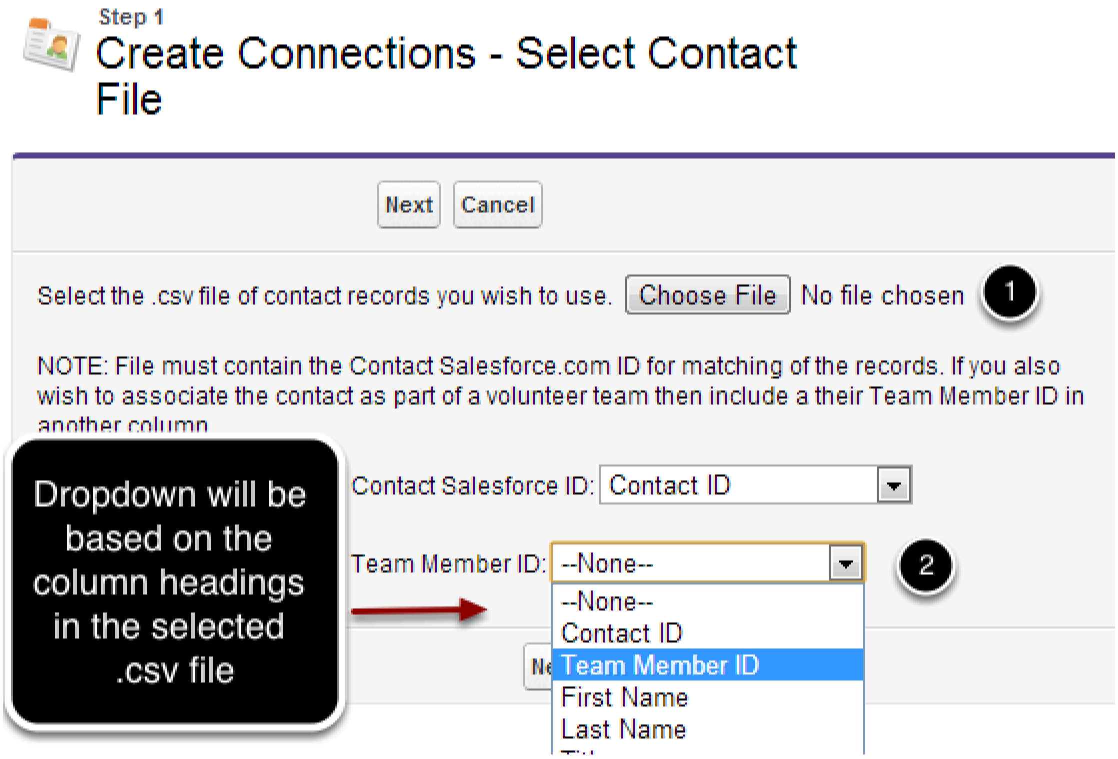
Getting your Contacts - View

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.

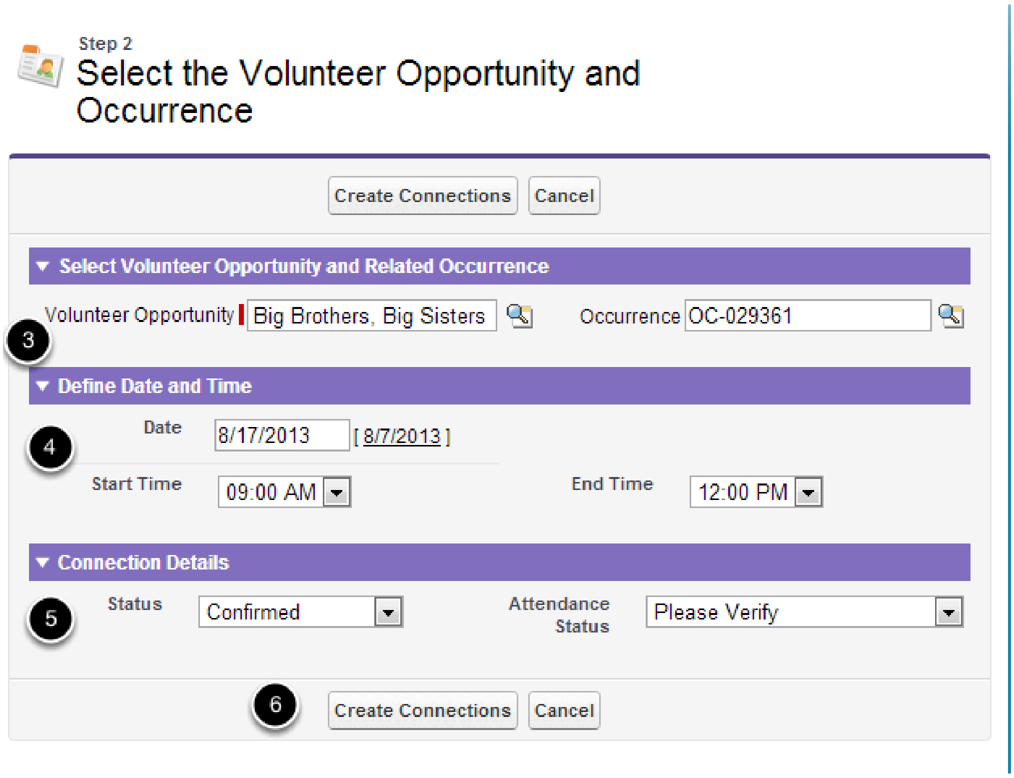
If you are using views and selecting the "Create Connections" button, you'll be able to skip the first step of the Wizard.

Importing Connections - Step 1





Importing Connections - Step 2



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

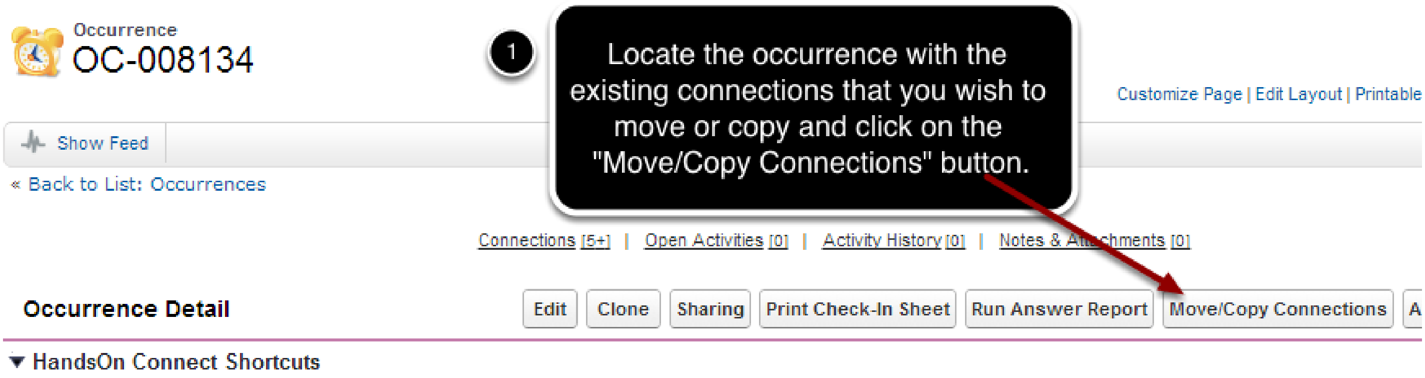
Once you click on "Create Connection" then go to the Occurrence and confirm that all connections were added.

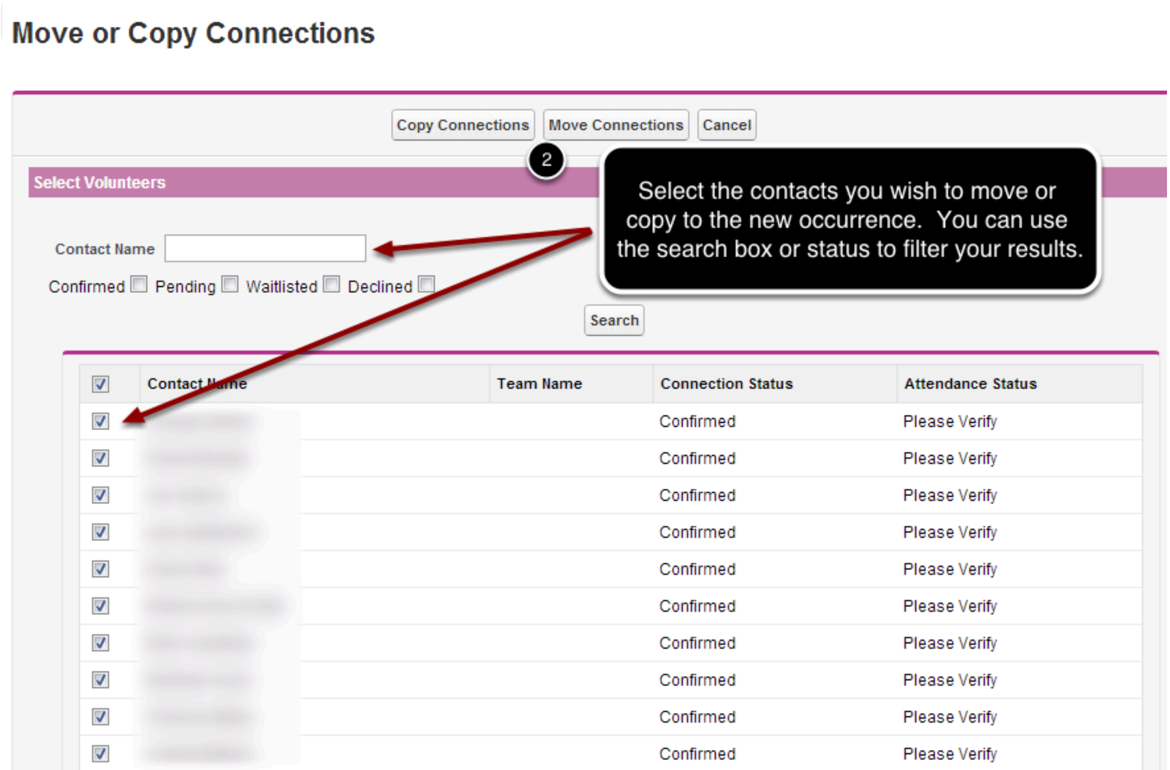
Enabling Batch Create Team Members and Connections

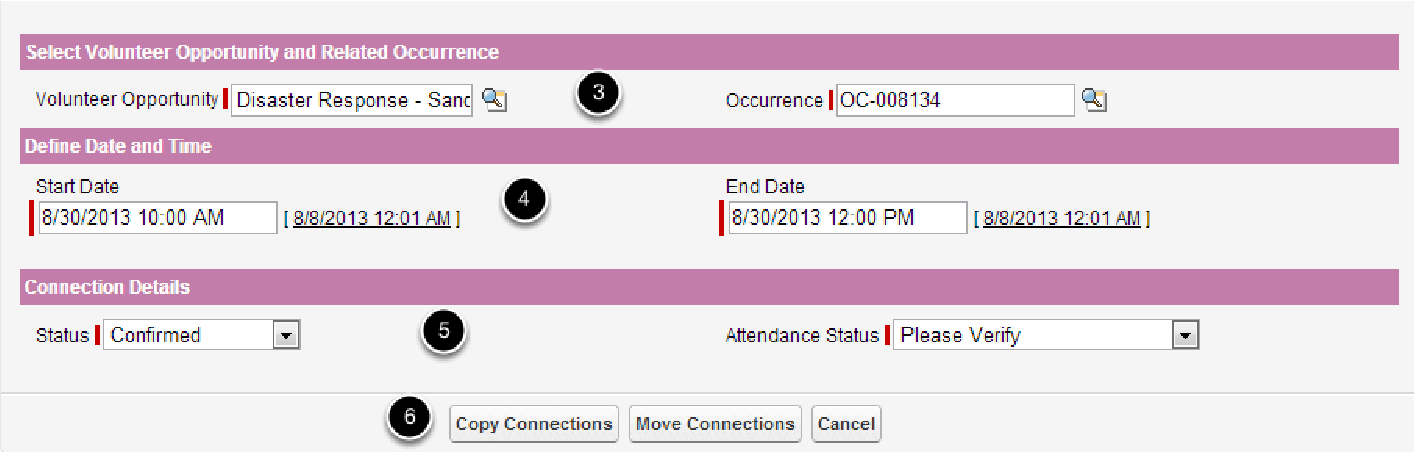
System Admins that wish to enable this functionality can follow the steps at this link.

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.







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

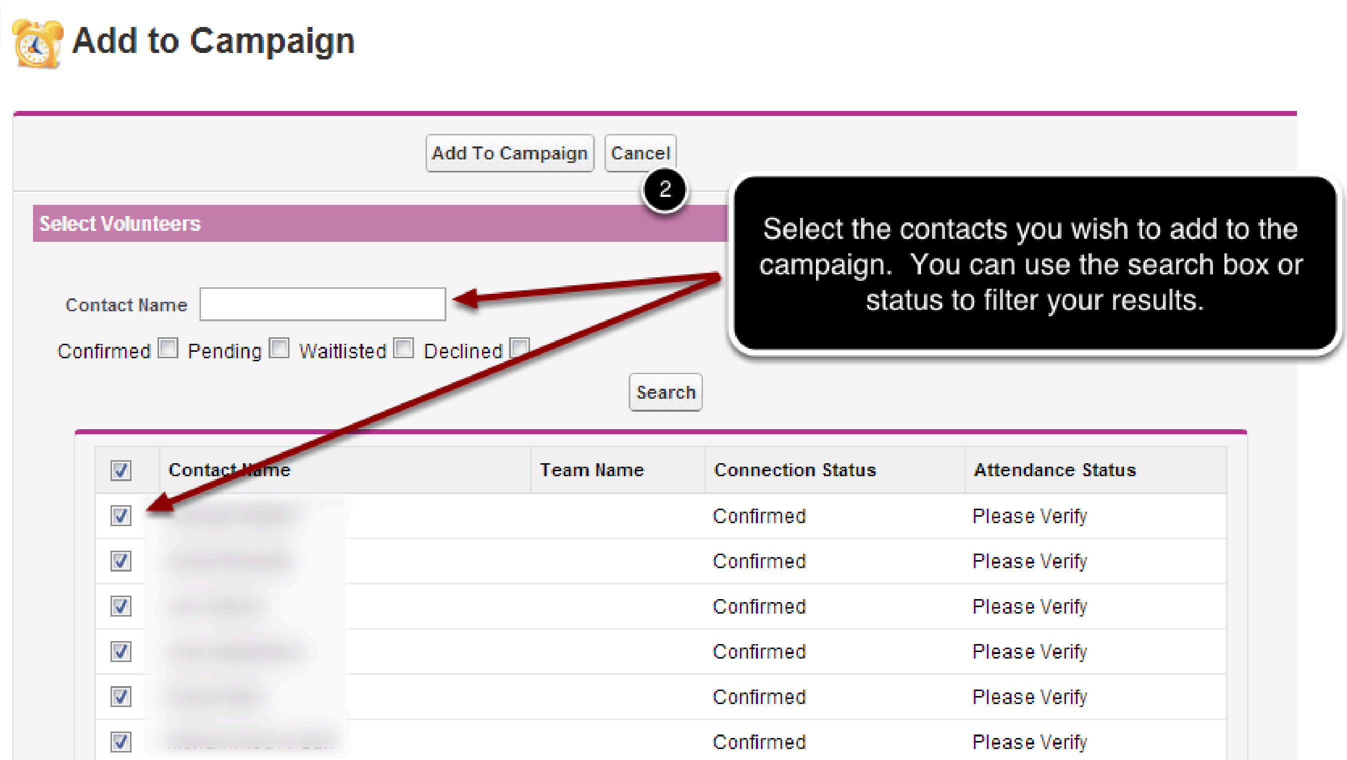
System Admins that wish to enable this functionality can follow the steps at this link.

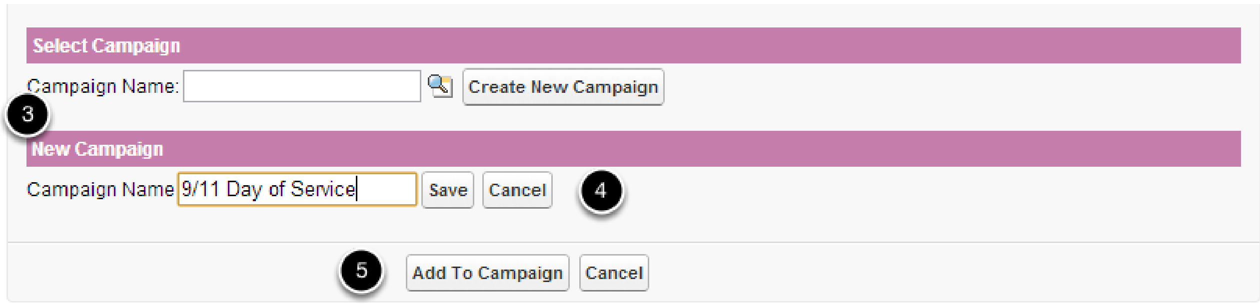
Adding occurrence connections to a campaign

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.]





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.

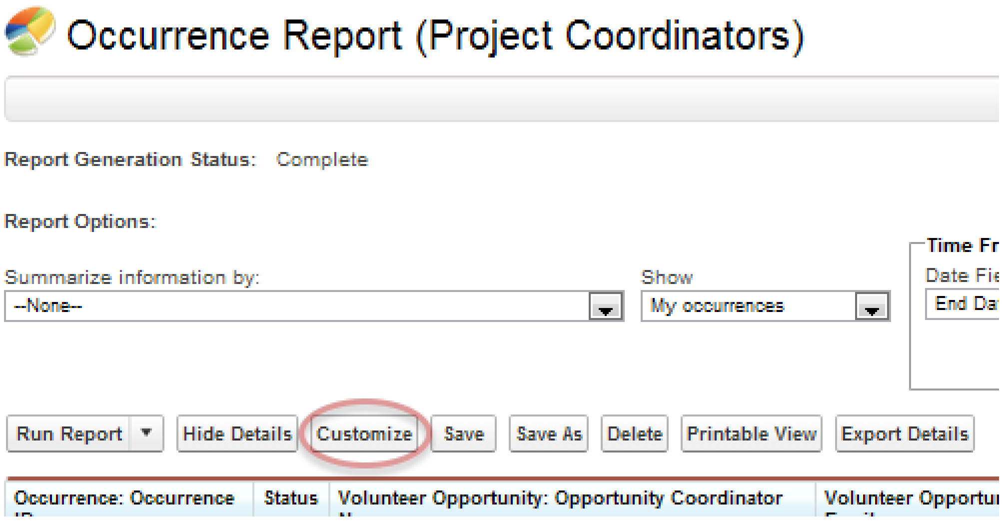
Building the Data Table

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.



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

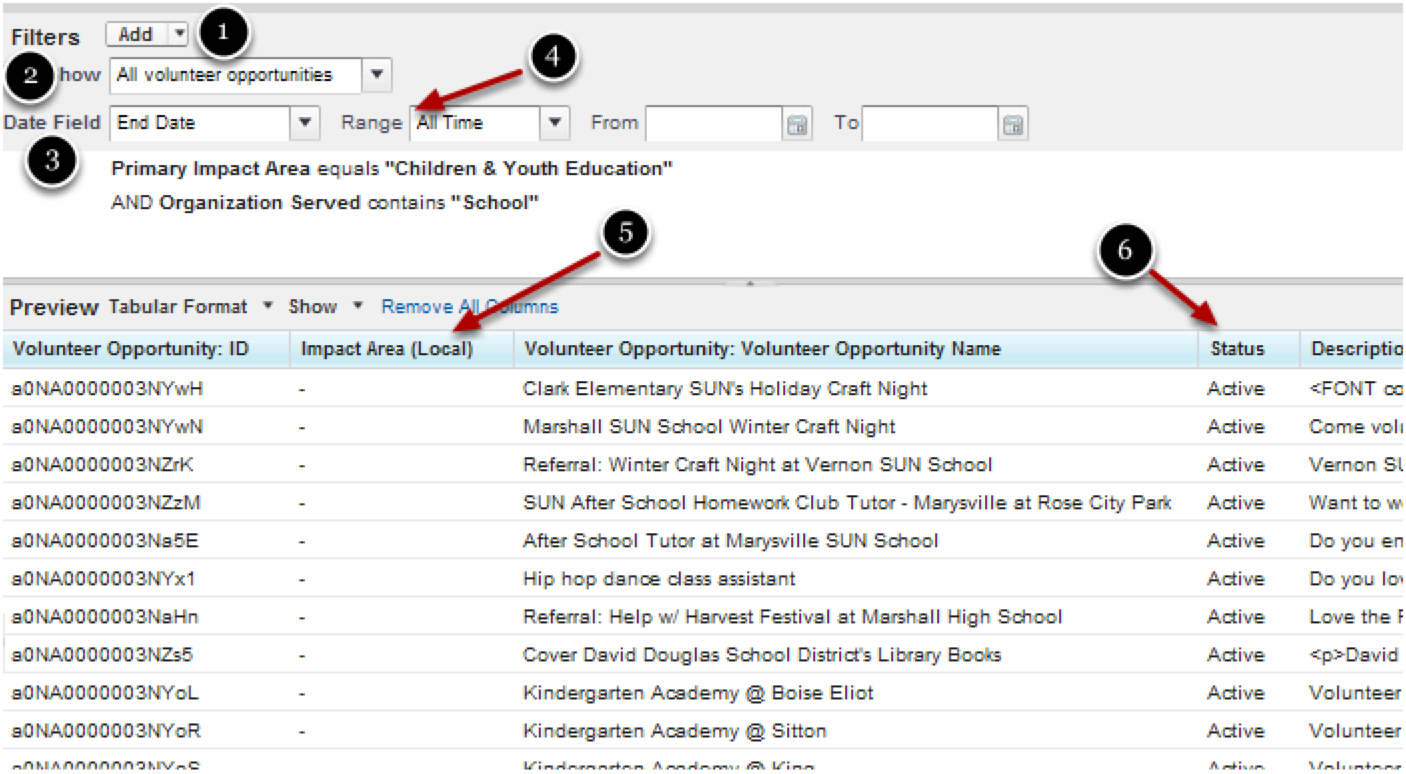
Partner Staff Name

Schedule Type

Status

Total Occurrences

Volunteer Event



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

Editing the Exported Table

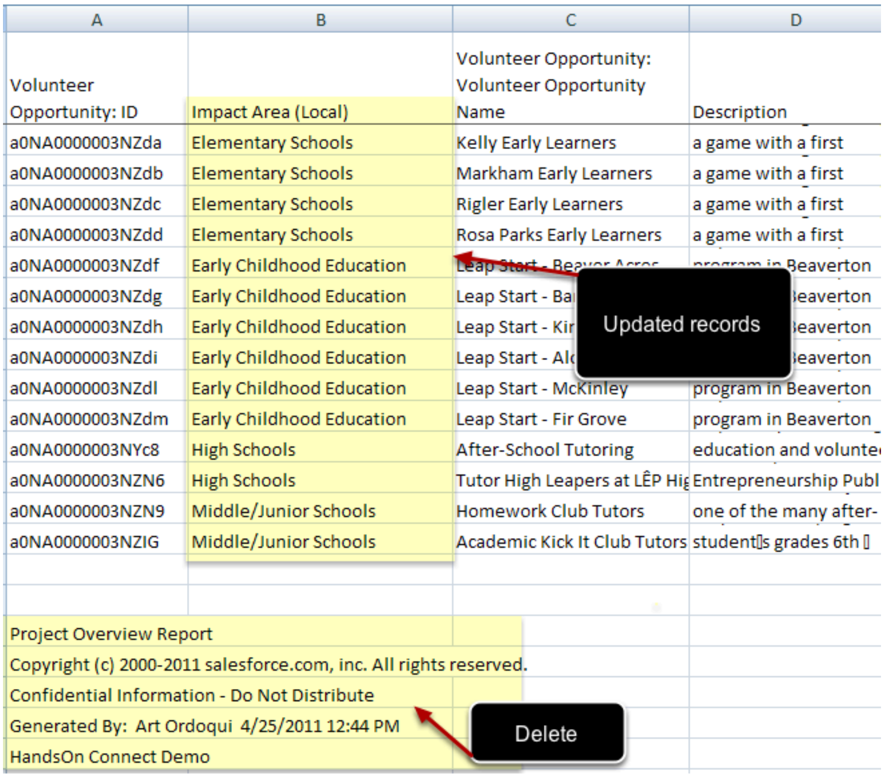
Open the Exported table and save a copy as a back-up of the data.

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.



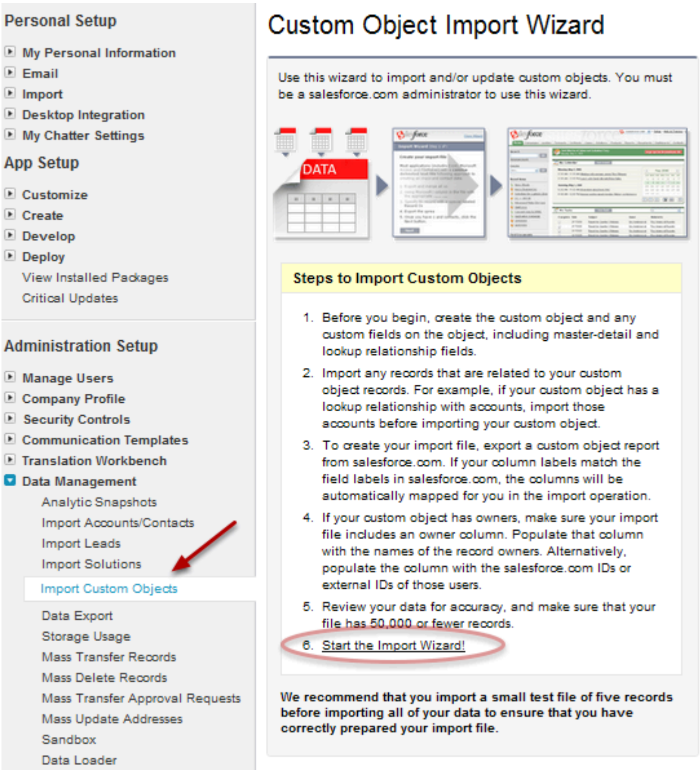
A	B	C	D
Volunteer Opportunity: ID	Impact Area (Local)	Volunteer Opportunity: Volunteer Opportunity Name	Description
a0NA0000003NZda	Elementary Schools	Kelly Early Learners	a game with a first
a0NA0000003NZdb	Elementary Schools	Markham Early Learners	a game with a first
a0NA0000003NZdc	Elementary Schools	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 - Ba	eaverton
a0NA0000003NZdh	Early Childhood Education	Leap Start - Kir	eaverton
a0NA0000003NZdi	Early Childhood Education	Leap Start - Alc	eaverton
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 LÊP 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			

Batch Updating the Records

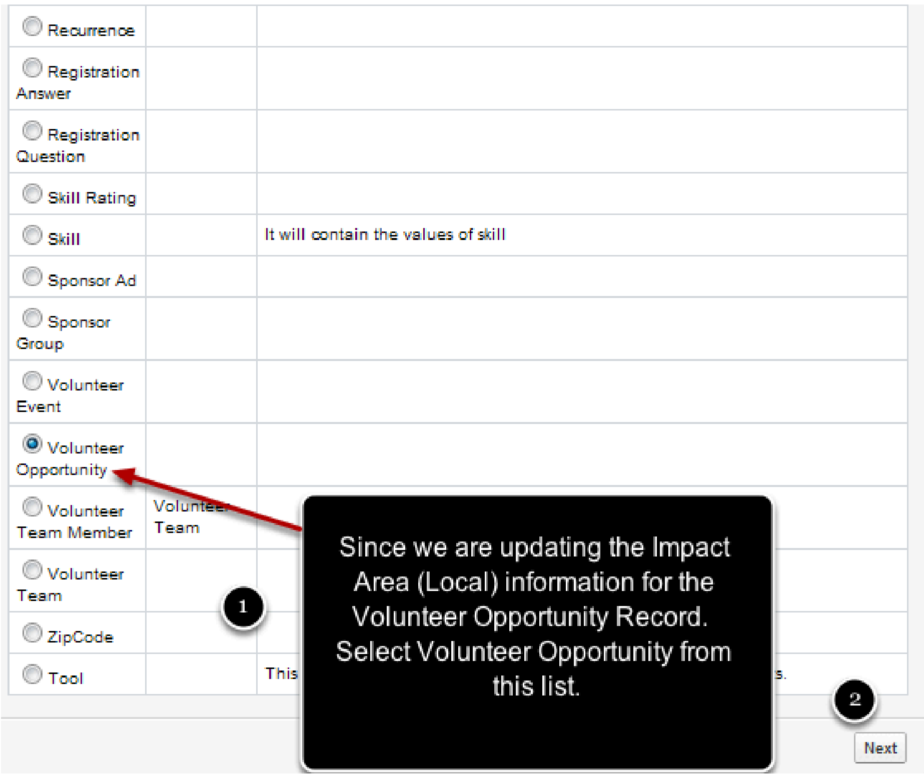
Now that the table has the updated information, we can proceed with the batch import to update the records.

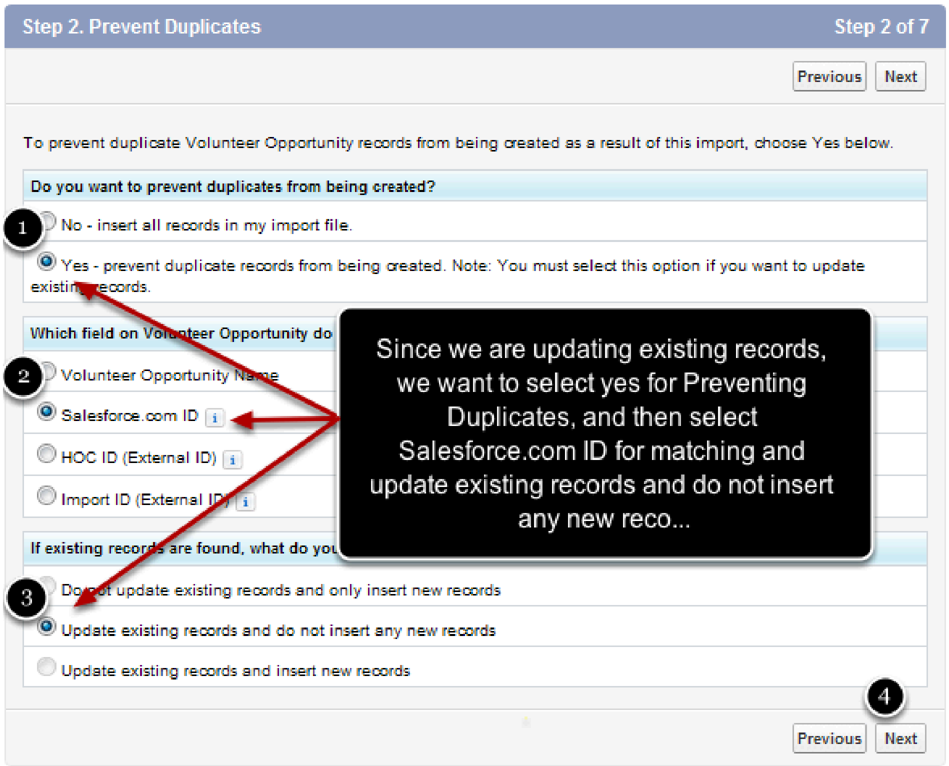
To start go to Setup/ Admin Setup/ Data Management/ Import Custom Objects

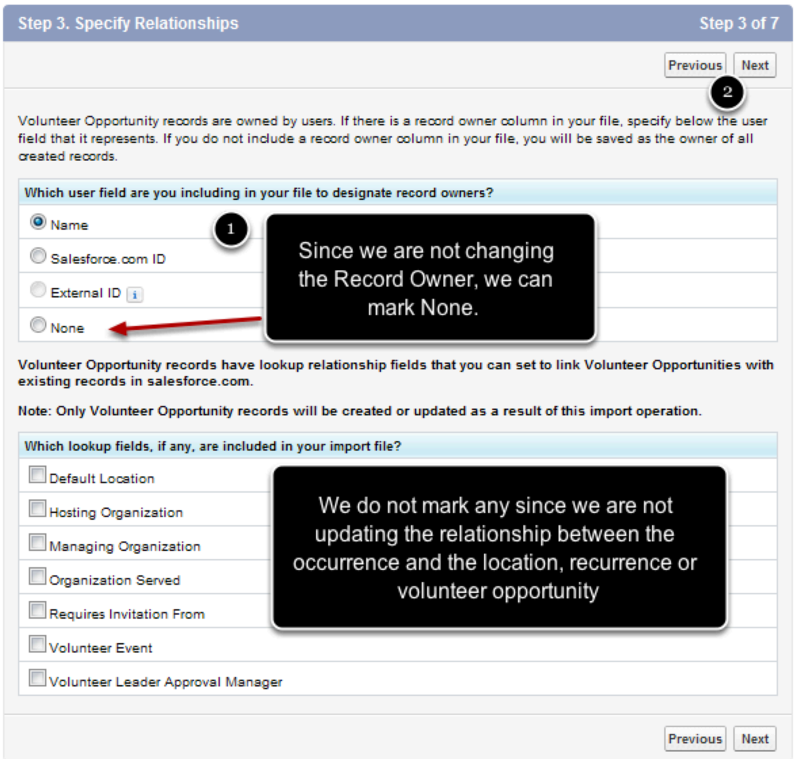
Then click on Start Import Wizard

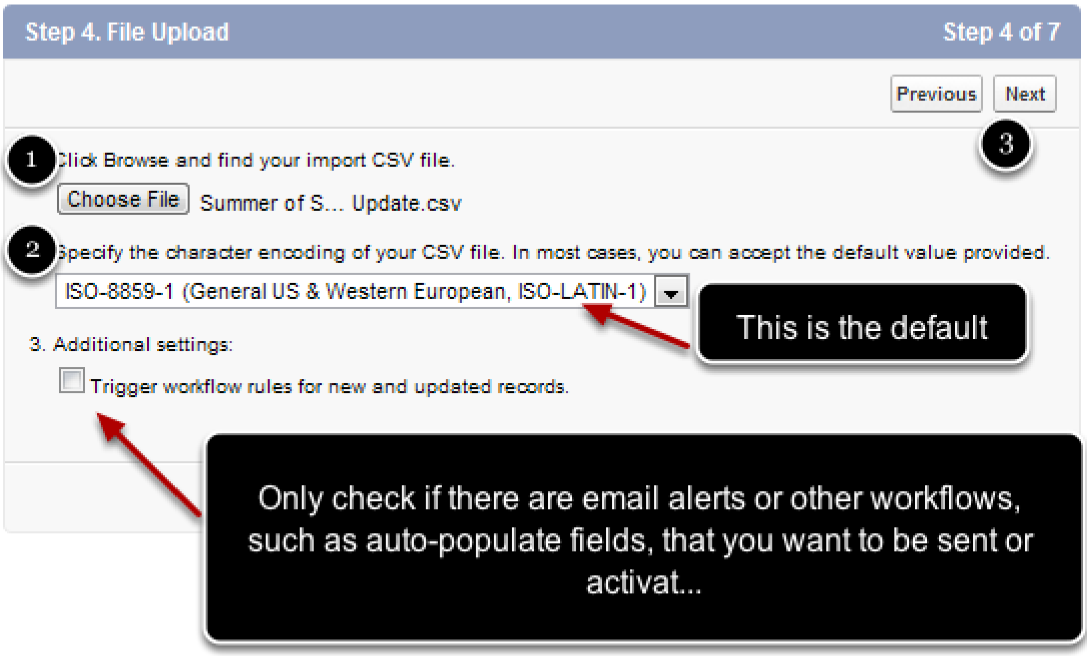


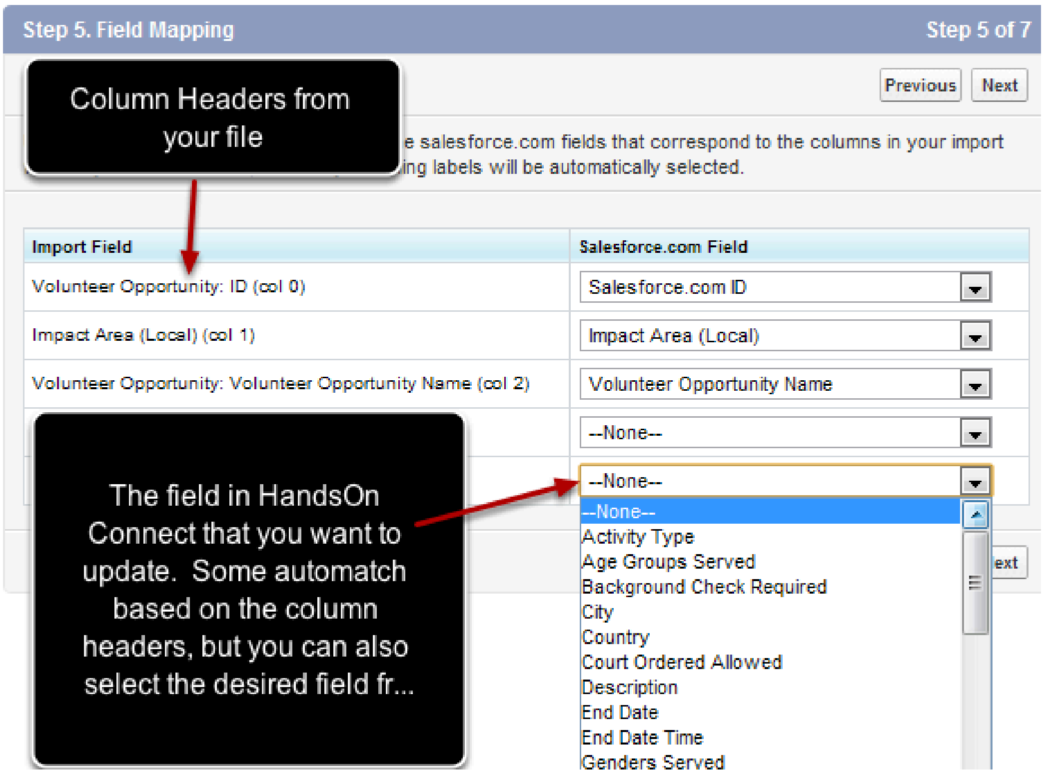
The import wizard will open up in a new window.

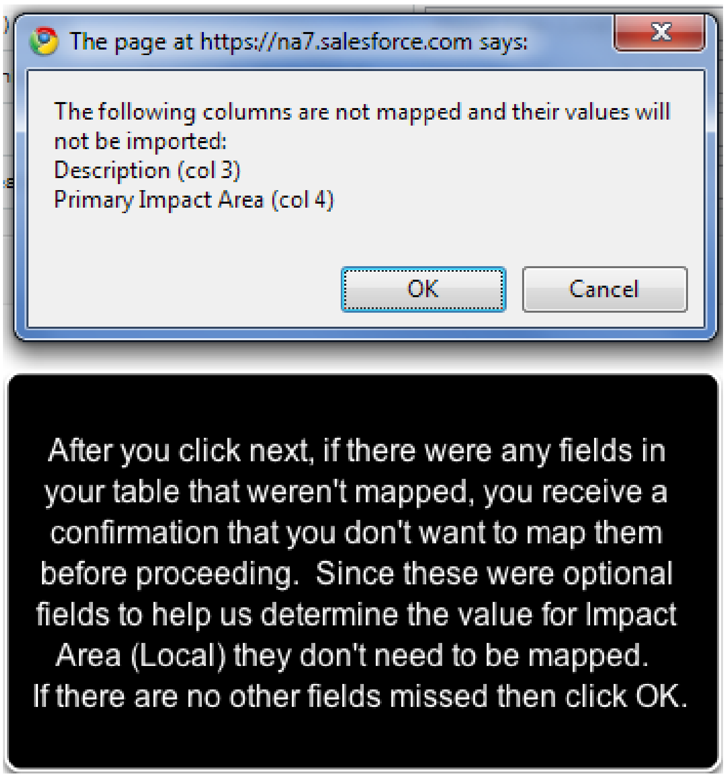


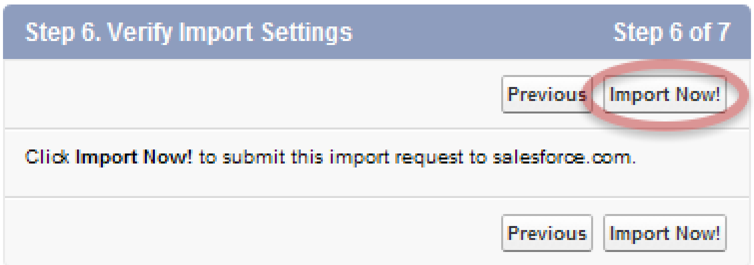

Step 2. Prevent Duplicates
Step 2 of 7
Previous
Next
To prevent duplicate Volunteer Opportunity records from being created as a result of this import, choose Yes below.
Do you want to prevent duplicates from being created?
No - insert all records in my import file.
Yes - prevent duplicate records from being created. Note: You must select this option if you want to update existing records.
Which field on Volunteer Opportunity do
Volunteer Opportunity Name
Salesforce.com ID
HOC ID (External ID)
Import ID (External ID)
If existing records are found, what do you
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
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...
1
2
3
4
Previous
Next

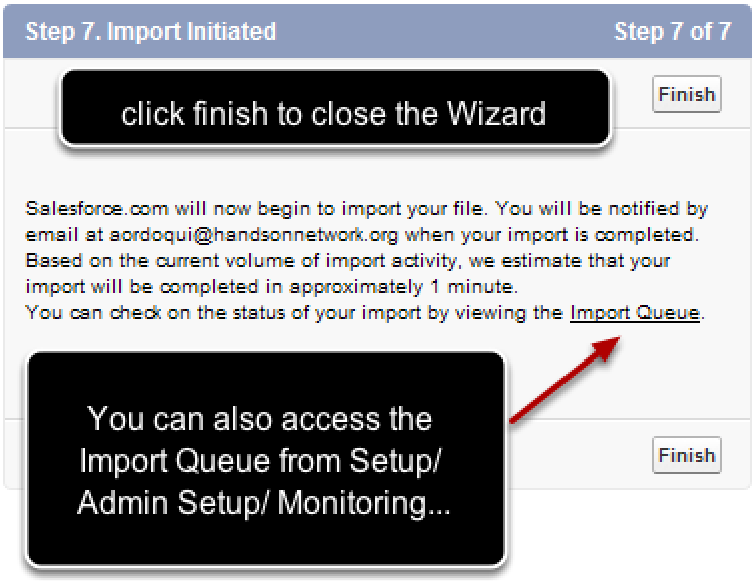

Step 3. Specify Relationships
Step 3 of 7
Previous
Next
2
Volunteer Opportunity records are owned by users. If there is a record owner column in your file, specify below the user field that it represents. If you do not include a record owner column in your file, you will be saved as the owner of all created records.
Which user field are you including in your file to designate record owners?
Name
Salesforce.com ID
External ID
None
1
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
We do not mark any since we are not updating the relationship between the occurrence and the location, recurrence or volunteer opportunity
Previous
Next


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
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)
3
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
e salesforce.com fields that correspond to the columns in your import
ing labels will be automatically selected.
Import Field
Salesforce.com Field
Volunteer Opportunity: ID (col 0)
Salesforce.com ID
Impact Area (Local) (col 1)
Impact Area (Local)
Volunteer Opportunity: Volunteer Opportunity Name (col 2)
Volunteer Opportunity Name
--None--
--None--
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...
--None--
Activity Type
Age Groups Served
Background Check Required
City
Country
Court Ordered Allowed
Description
End Date
End Date Time
Genders Served
ext







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.

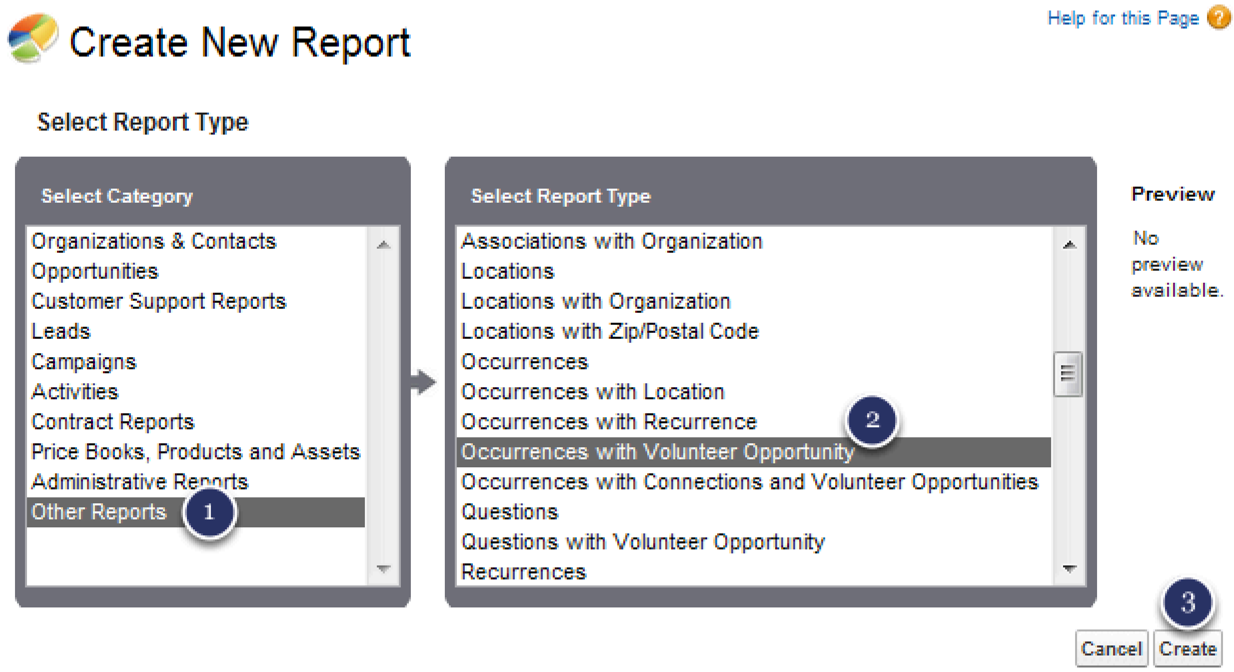
While this post utilizes a specific example, you can you the steps outlined in this post to update other objects and fields, by building out a report that meets your needs.

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



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

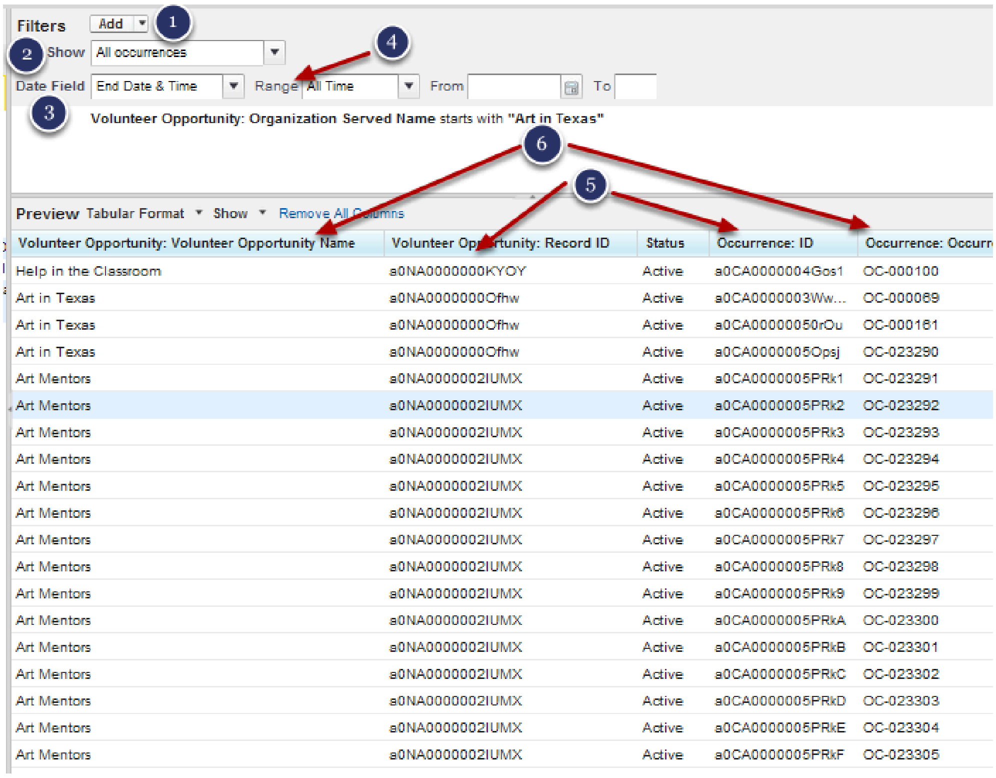
Volunteer Opportunity: Record ID

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-######).



Volunteer Opportunity: Volunteer Opportunity Name	Volunteer Opportunity: Record ID	Status	Occurrence: ID	Occurrence: Occurr
Help in the Classroom	a0NA0000000KYOY	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	a0NA0000002IUMX	Active	a0CA0000005PRk1	OC-023291
Art Mentors	a0NA0000002IUMX	Active	a0CA0000005PRk2	OC-023292
Art Mentors	a0NA0000002IUMX	Active	a0CA0000005PRk3	OC-023293
Art Mentors	a0NA0000002IUMX	Active	a0CA0000005PRk4	OC-023294
Art Mentors	a0NA0000002IUMX	Active	a0CA0000005PRk5	OC-023295
Art Mentors	a0NA0000002IUMX	Active	a0CA0000005PRk6	OC-023296
Art Mentors	a0NA0000002IUMX	Active	a0CA0000005PRk7	OC-023297
Art Mentors	a0NA0000002IUMX	Active	a0CA0000005PRk8	OC-023298
Art Mentors	a0NA0000002IUMX	Active	a0CA0000005PRk9	OC-023299
Art Mentors	a0NA0000002IUMX	Active	a0CA0000005PRkA	OC-023300
Art Mentors	a0NA0000002IUMX	Active	a0CA0000005PRkB	OC-023301
Art Mentors	a0NA0000002IUMX	Active	a0CA0000005PRkC	OC-023302
Art Mentors	a0NA0000002IUMX	Active	a0CA0000005PRkD	OC-023303
Art Mentors	a0NA0000002IUMX	Active	a0CA0000005PRkE	OC-023304
Art Mentors	a0NA0000002IUMX	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

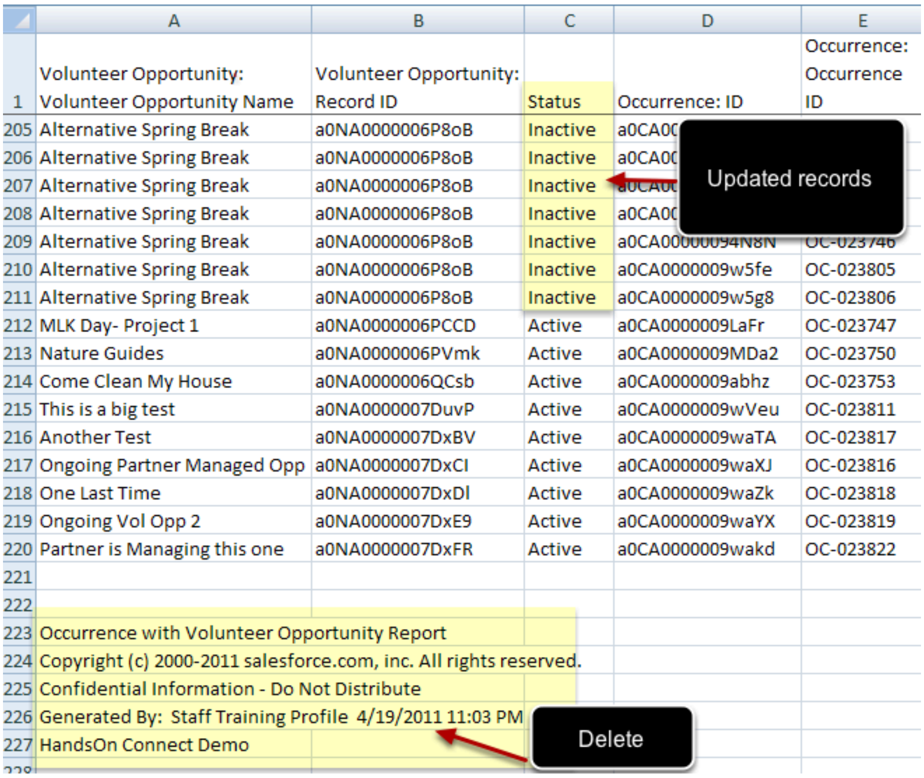
Open the Exported table and save a copy as a back-up of the data.

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
1	Volunteer Opportunity: Volunteer Opportunity Name	Volunteer Opportunity: Record ID	Status	Occurrence: ID	Occurrence: Occurrence ID
205	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA0(	
206	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA0(	
207	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA0(	
208	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA0(	
209	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA00000094N8N	OC-023746
210	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA0000009w5fe	OC-023805
211	Alternative Spring Break	a0NA0000006P8oB	Inactive	a0CA0000009w5g8	OC-023806
212	MLK Day- Project 1	a0NA0000006PCCD	Active	a0CA0000009LaFr	OC-023747
213	Nature Guides	a0NA0000006PVmk	Active	a0CA0000009MDa2	OC-023750
214	Come Clean My House	a0NA0000006QCsb	Active	a0CA0000009abhz	OC-023753
215	This is a big test	a0NA0000007DuvP	Active	a0CA0000009wVeu	OC-023811
216	Another Test	a0NA0000007DxBV	Active	a0CA0000009waTA	OC-023817
217	Ongoing Partner Managed Opp	a0NA0000007DxCI	Active	a0CA0000009waXJ	OC-023816
218	One Last Time	a0NA0000007DxDl	Active	a0CA0000009waZk	OC-023818
219	Ongoing Vol Opp 2	a0NA0000007DxE9	Active	a0CA0000009waYX	OC-023819
220	Partner is Managing this one	a0NA0000007DxFR	Active	a0CA0000009wakd	OC-023822
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				

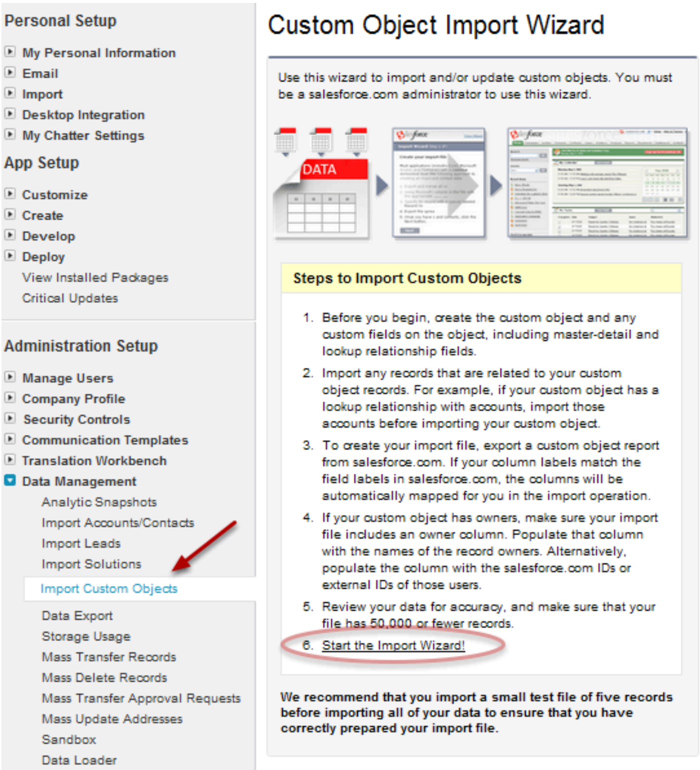
Batch Updating the Records

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

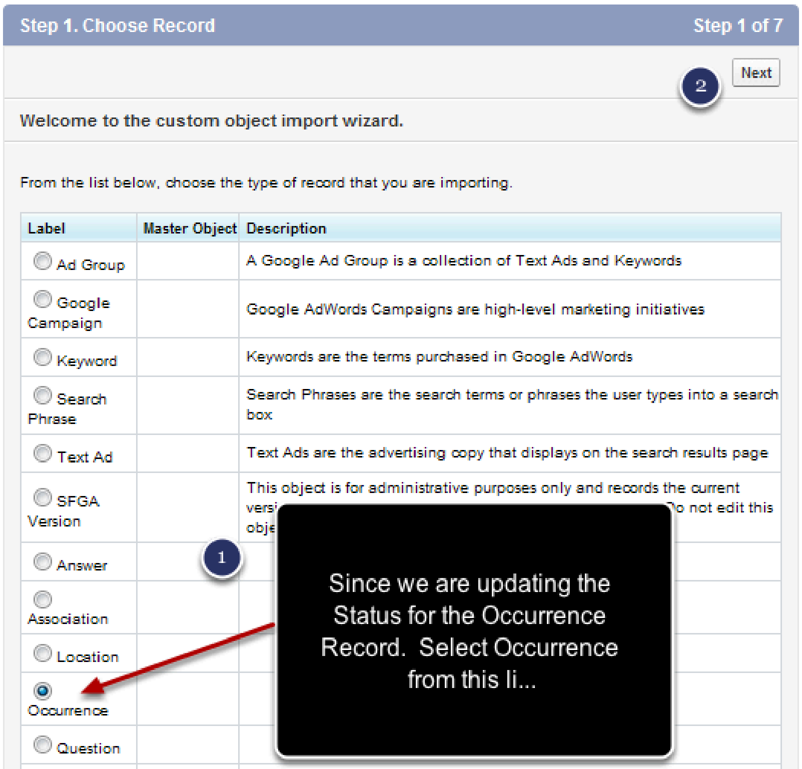
We can only update one record at a time so we will start with the Occurrences.

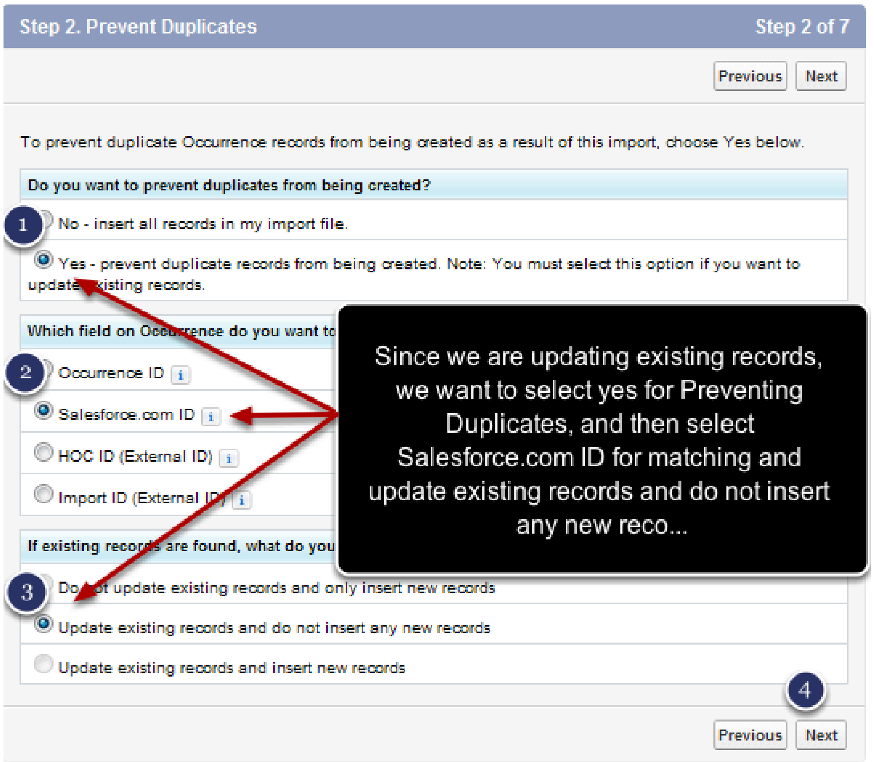
To start go to Setup/ Admin Setup/ Data Management/ Import Custom Objects

Then click on Start Import Wizard

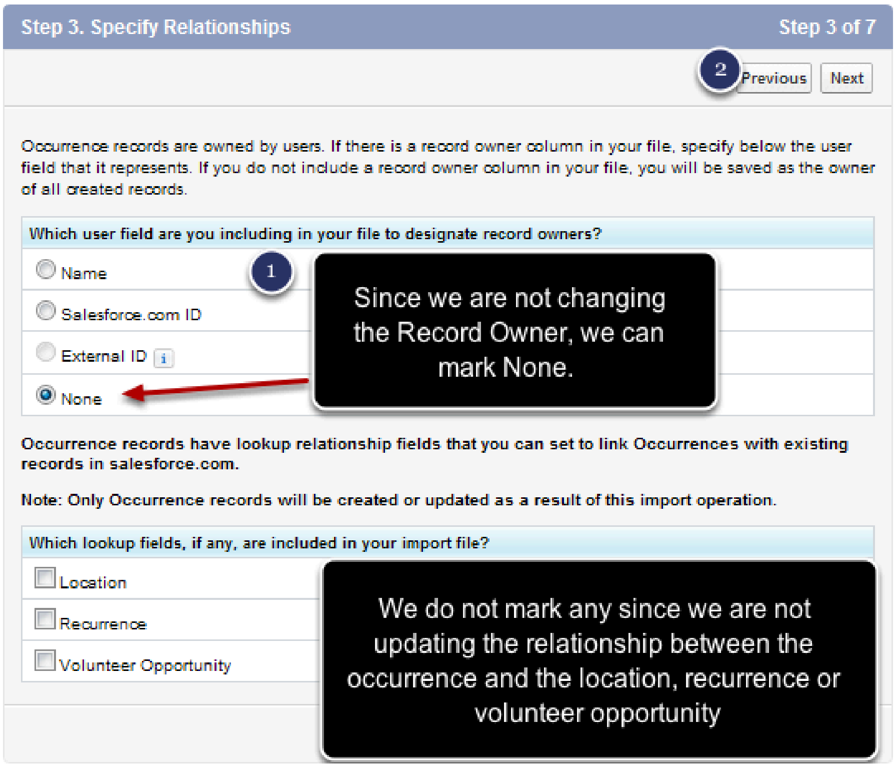


The import wizard will open up in a new window.

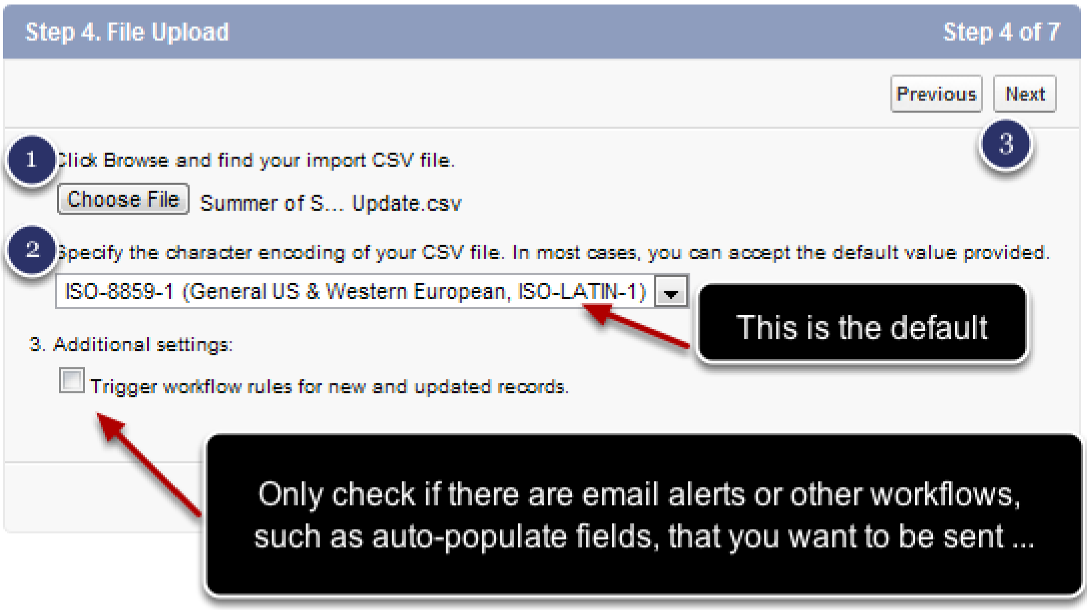


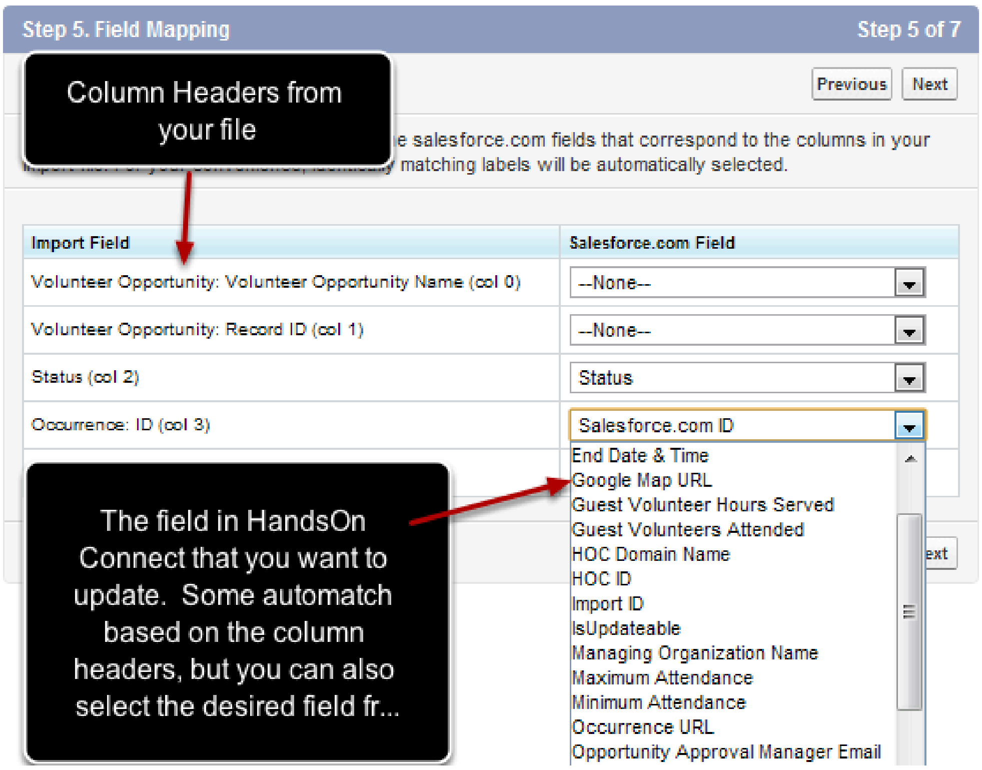


Step 2. Prevent Duplicates
Step 2 of 7
Previous
Next
To prevent duplicate Occurrence records from being created as a result of this import, choose Yes below.
Do you want to prevent duplicates from being created?
No - insert all records in my import file.
Yes - prevent duplicate records from being created. Note: You must select this option if you want to update existing records.
Which field on Occurrence do you want to
Occurrence ID
Salesforce.com ID
HOC ID (External ID)
Import ID (External ID)
If existing records are found, what do you
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
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...
1
2
3
4
Previous
Next

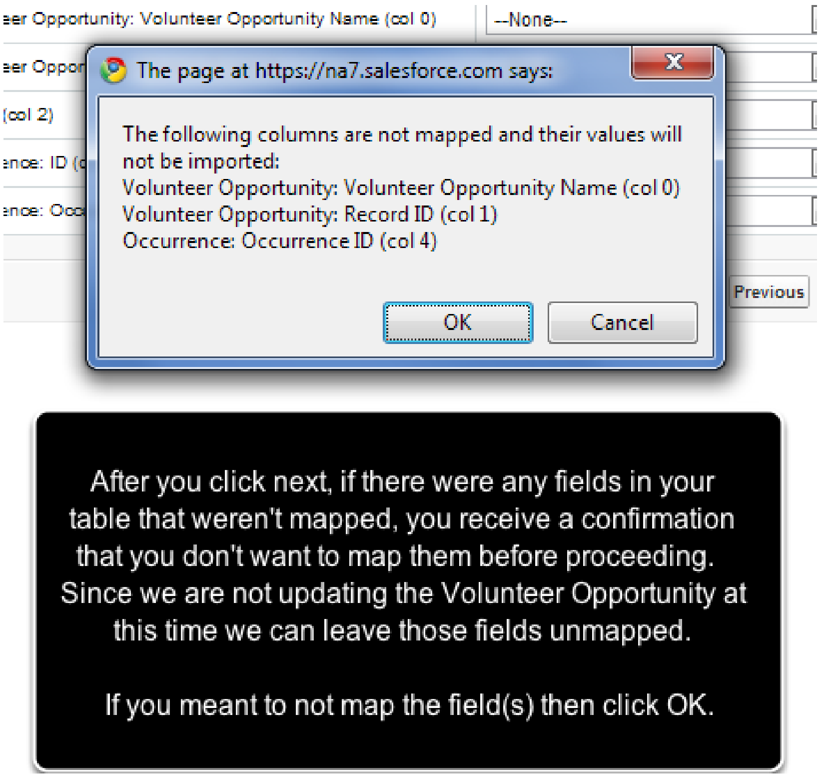


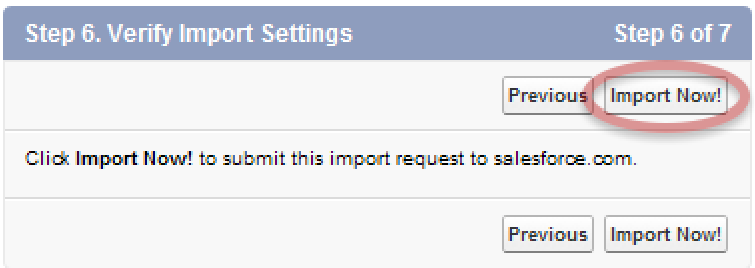
Step 3. Specify Relationships
Step 3 of 7
Previous
Next
Occurrence records are owned by users. If there is a record owner column in your file, specify below the user field that it represents. If you do not include a record owner column in your file, you will be saved as the owner of all created records.
Which user field are you including in your file to designate record owners?
Name
Salesforce.com ID
External ID
None
Since we are not changing the Record Owner, we can mark 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
We do not mark any since we are not updating the relationship between the occurrence and the location, recurrence or volunteer opportunity
1
2

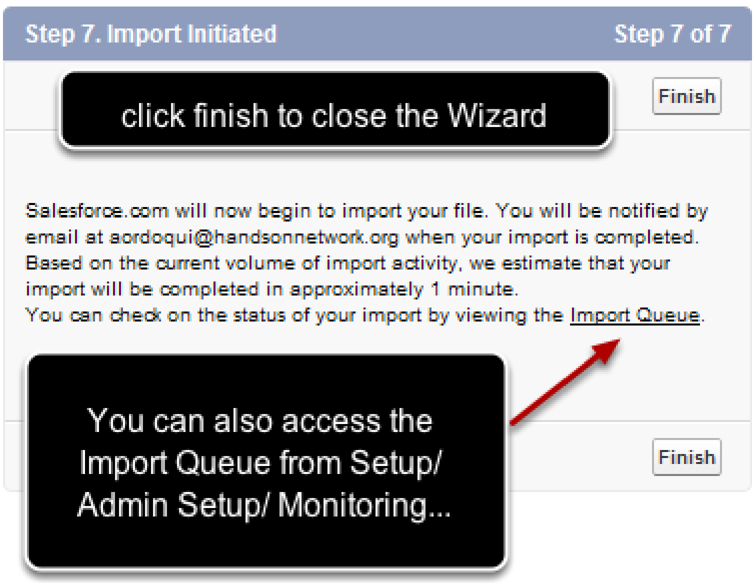




<u>Note:</u> Select Salesforce.com ID for the ID associated with the primary record you are updating. In this case Occurrence: ID is the column that gets mapped to the Salesforce.com ID.







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

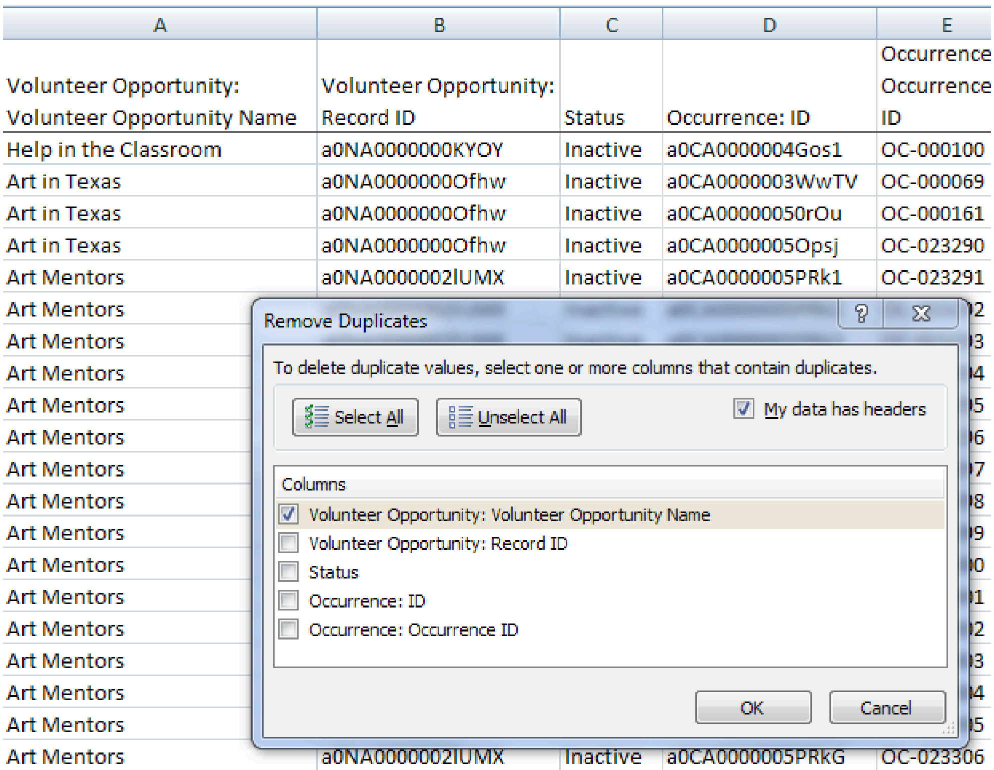
Editing the Import Table for Volunteer Opportunities

After the Occurrences have been updated we can then update the Volunteer Opportunities using the same steps as above with a few modifications.

Since the data table we used at the start was designed to have a row for each occurrence, the result is multiple rows for each Volunteer Opportunity. While Salesforce.com can handle the presence of a few duplicates in the table, the preferred action it to remove the duplicates prior to updating the Volunteer Opportunities.

If you included the Volunteer Opportunity Name in your original table, you can use that column to remove the duplicates. You can also opt to create a new custom report that just has the volunteer opportunities.

<u>**Excel for Windows Tip:**</u> Highlight all the columns in the table and select Remove Duplicates under the data menu. It'll ask you to select which column to search for duplicates, when it finds a duplicate, it'll remove the entire row leaving only the first instance of that value.



Once you've removed the duplicates, you can proceed with the steps for the Import Custom Objects Wizard.

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

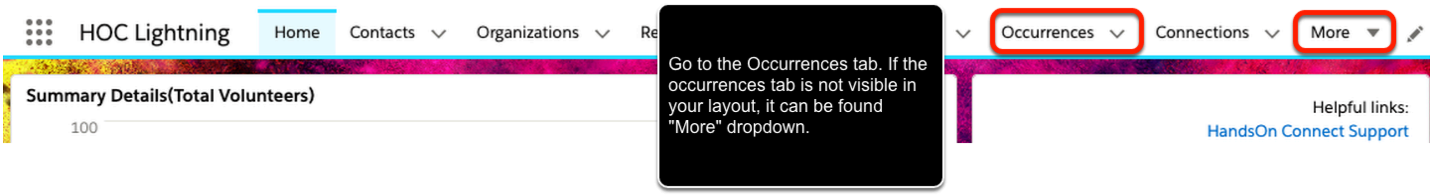
In this post we will show you the basic steps for updating the Opportunity Coordinator for Occurrences.

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.

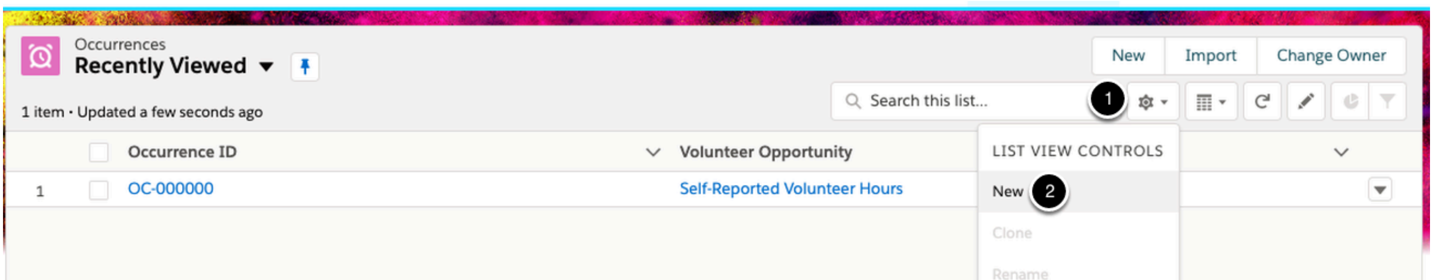
For this example we are updating the Opportunity Coordinator for the Occurrences associated with the Volunteer at the Fisherman's Festival opportunity. The Opportunity Coordinator is currently H.R. Wells and it needs to be updated to Charles Xavier.

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

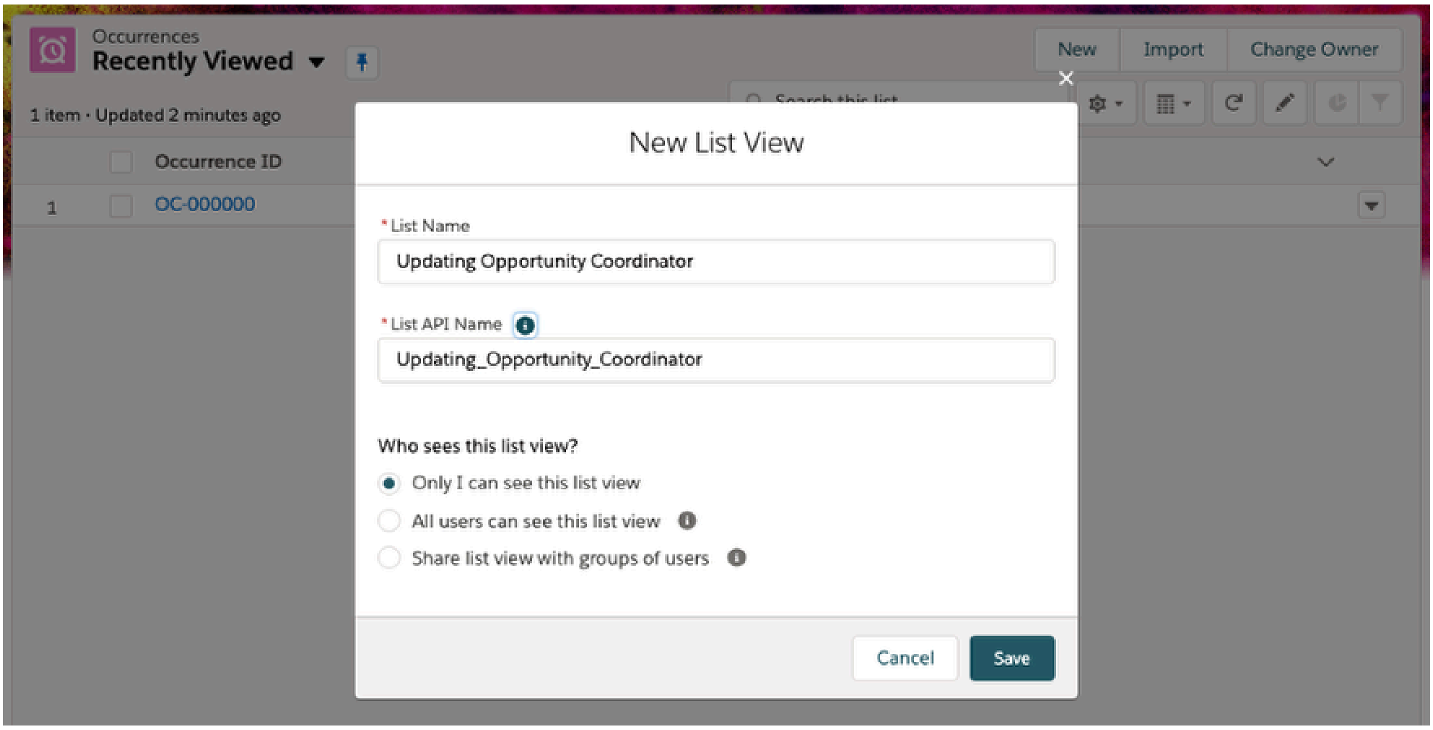


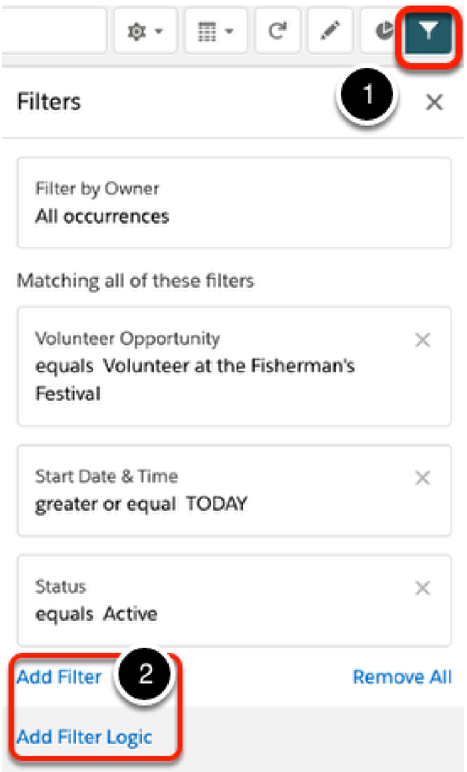
Once in the Occurrences object. Click on "New"



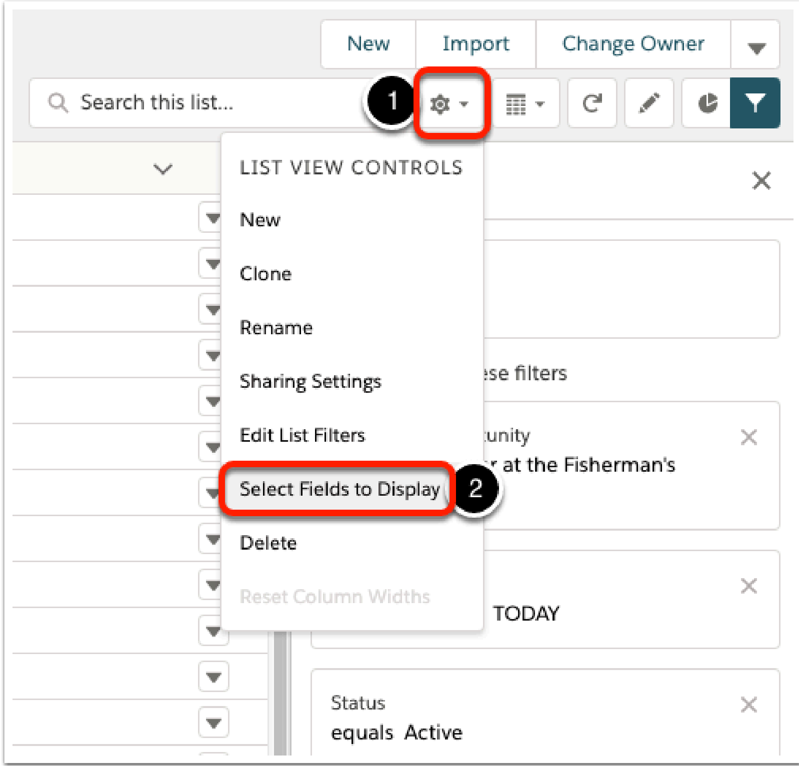
In creating the new view, you first create the list view and then continue with the filtering to restrict the records shown in the list view. Once those two steps have been completed, you identify which columns you wish to have in your view.

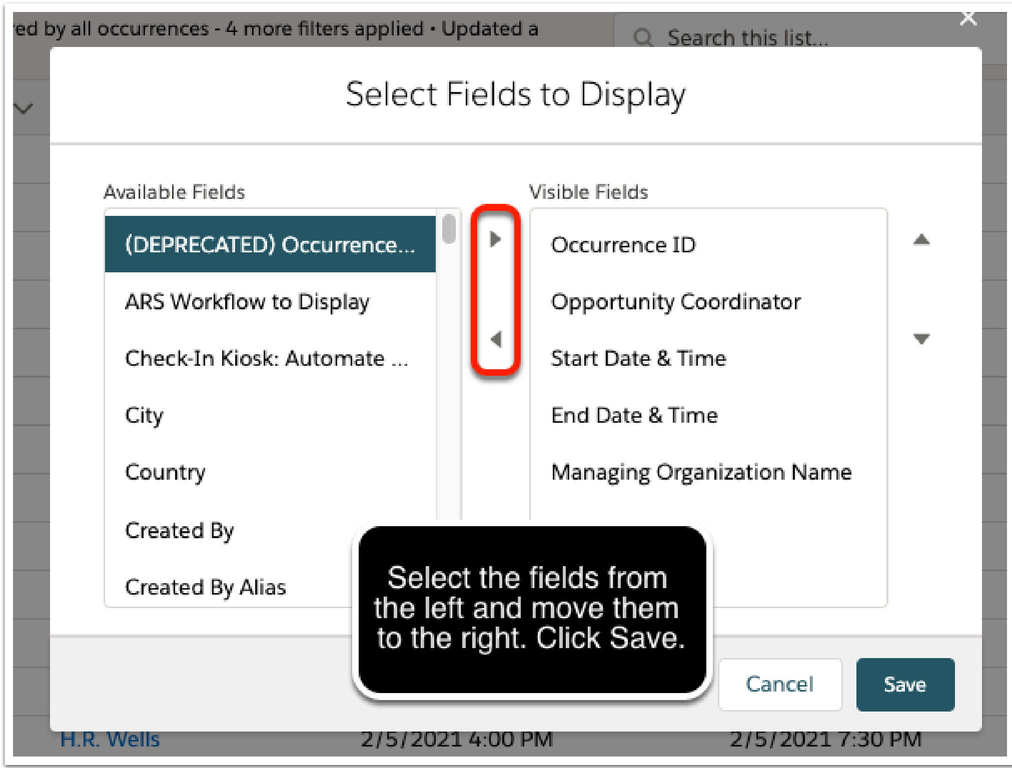
In this example we are wanting to update all the upcoming occurrences associated with Fisherman's Festival.



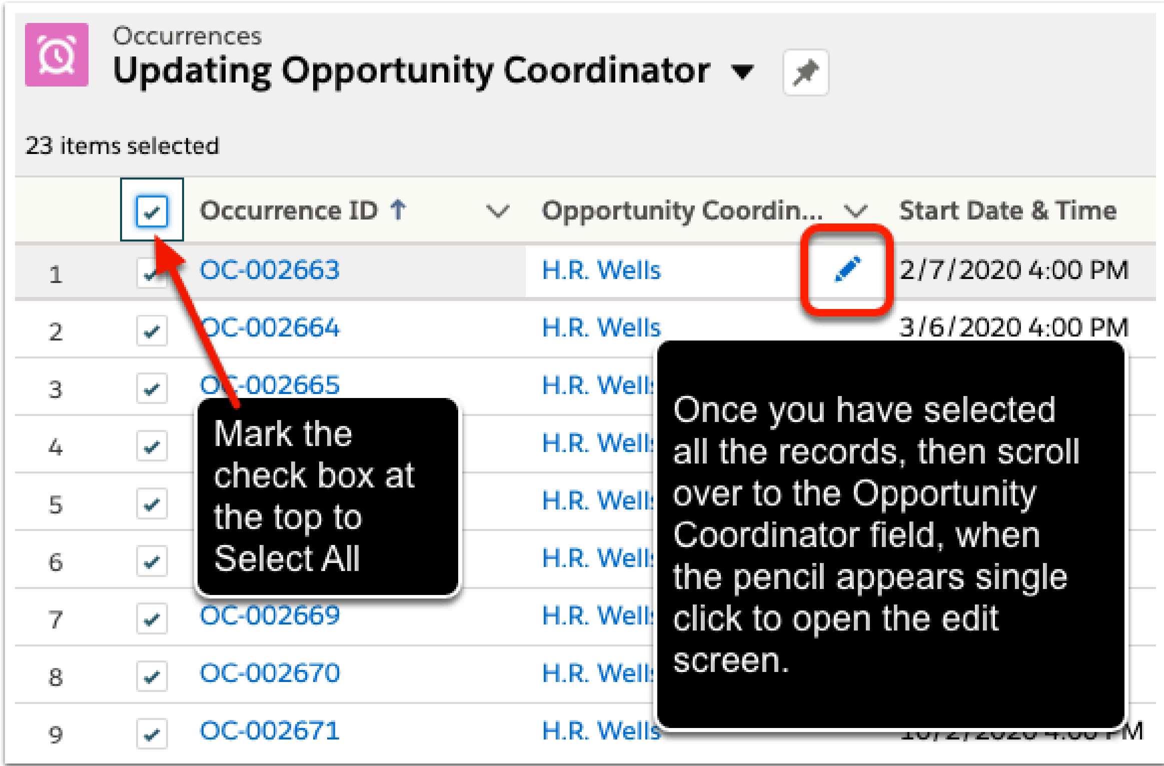


Be sure to click Save when modifying any filters for your list view.

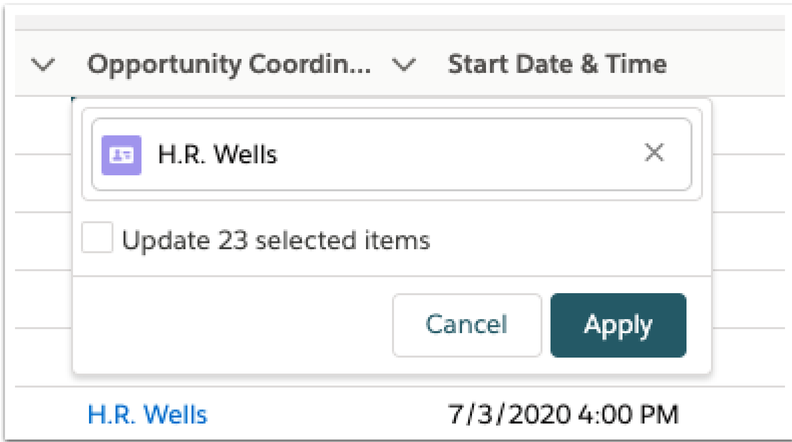

New
Import
Change Owner
Search this list...
1
LIST VIEW CONTROLS
New
Clone
Rename
Sharing Settings
Edit List Filters
Select Fields to Display
2
Delete
Reset Column Widths
TODAY
Status
equals Active

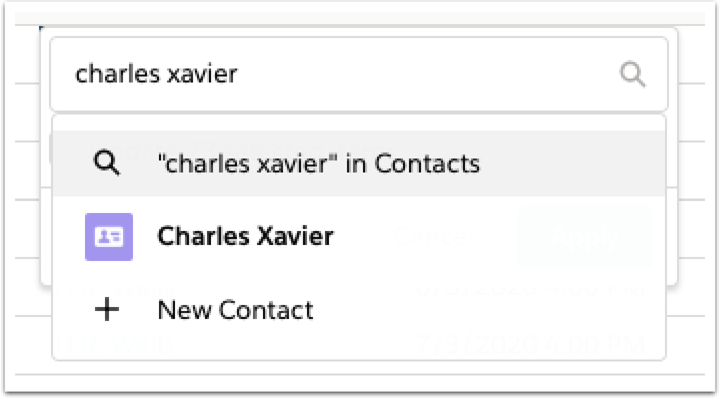

Select Fields to Display
Available Fields
(DEPRECATED) Occurrence...
ARS Workflow to Display
Check-In Kiosk: Automate ...
City
Country
Created By
Created By Alias
Visible Fields
Occurrence ID
Opportunity Coordinator
Start Date & Time
End Date & Time
Managing Organization Name
Select the fields from the left and move them to the right. Click Save.
Cancel
Save

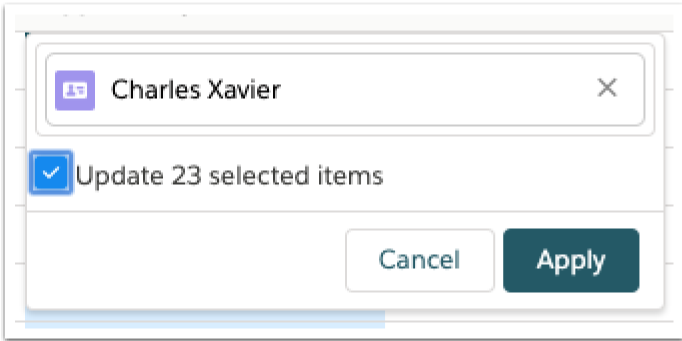
Changing the Opportunity Coordinator



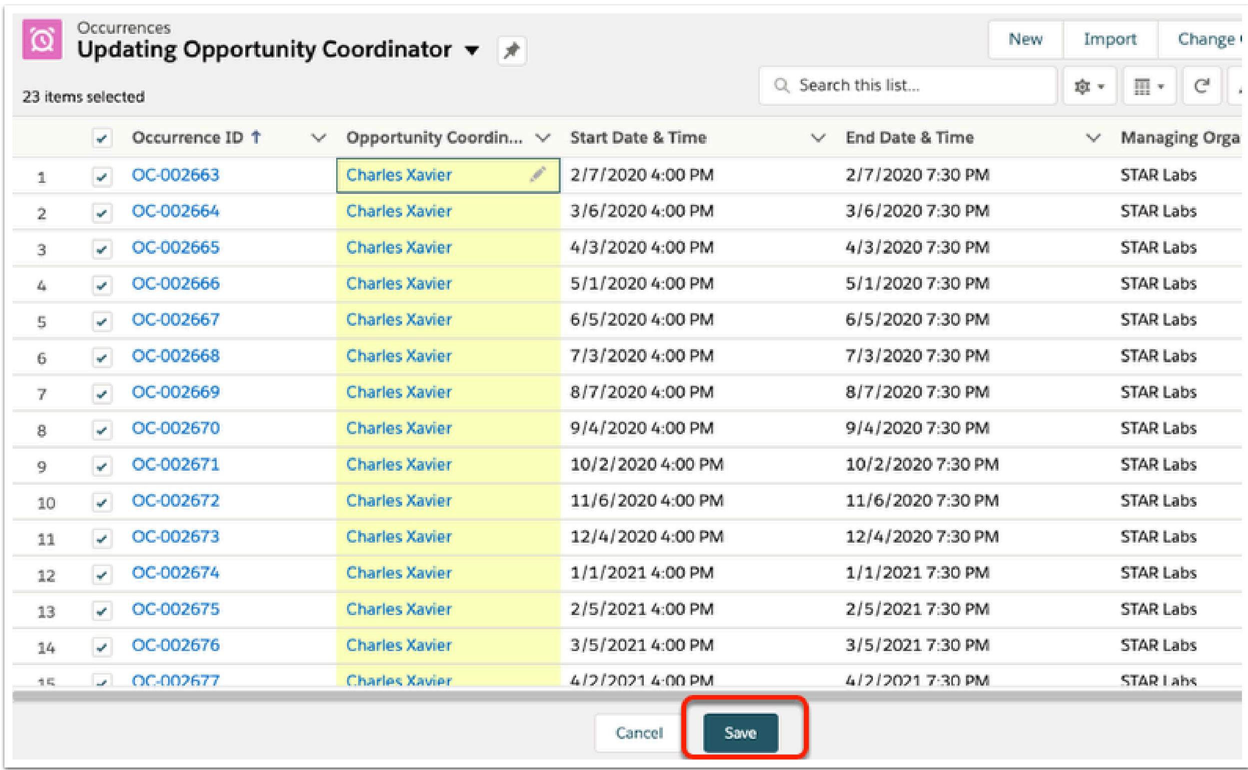
Click the "X" to remove the current coordinator and type in the search box to find your new coordinator. Make your selection and then be sure to check the box for "Update xx selected items" and then click apply.

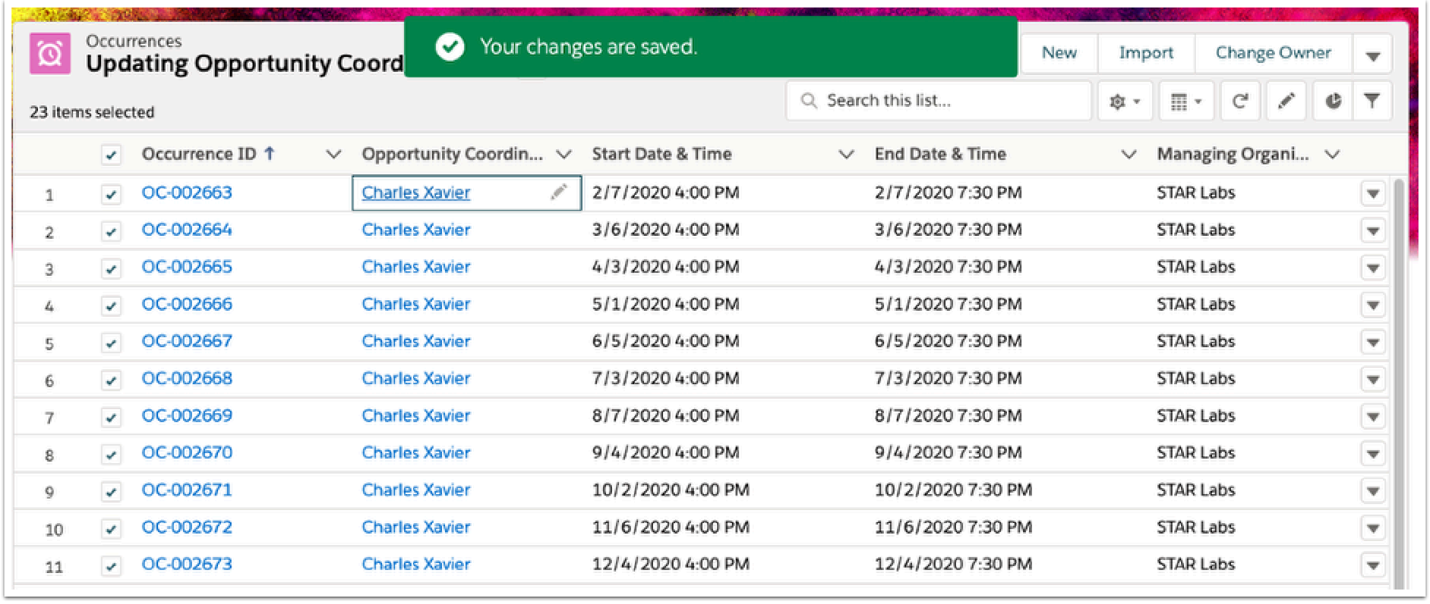






When the window first reloads, the Opportunity Coordinator Email will be revised on the screen and highlighted in yellow, but this change must be saved. Click Save at the bottom.





		Occurrence ID	Opportunity Coordin...	Start Date & Time	End Date & Time	Managing Organi...
1	✓	OC-002663	Charles Xavier	2/7/2020 4:00 PM	2/7/2020 7:30 PM	STAR Labs
2	✓	OC-002664	Charles Xavier	3/6/2020 4:00 PM	3/6/2020 7:30 PM	STAR Labs
3	✓	OC-002665	Charles Xavier	4/3/2020 4:00 PM	4/3/2020 7:30 PM	STAR Labs
4	✓	OC-002666	Charles Xavier	5/1/2020 4:00 PM	5/1/2020 7:30 PM	STAR Labs
5	✓	OC-002667	Charles Xavier	6/5/2020 4:00 PM	6/5/2020 7:30 PM	STAR Labs
6	✓	OC-002668	Charles Xavier	7/3/2020 4:00 PM	7/3/2020 7:30 PM	STAR Labs
7	✓	OC-002669	Charles Xavier	8/7/2020 4:00 PM	8/7/2020 7:30 PM	STAR Labs
8	✓	OC-002670	Charles Xavier	9/4/2020 4:00 PM	9/4/2020 7:30 PM	STAR Labs
9	✓	OC-002671	Charles Xavier	10/2/2020 4:00 PM	10/2/2020 7:30 PM	STAR Labs
10	✓	OC-002672	Charles Xavier	11/6/2020 4:00 PM	11/6/2020 7:30 PM	STAR Labs
11	✓	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 date with imports, updates, exports, and delete.

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

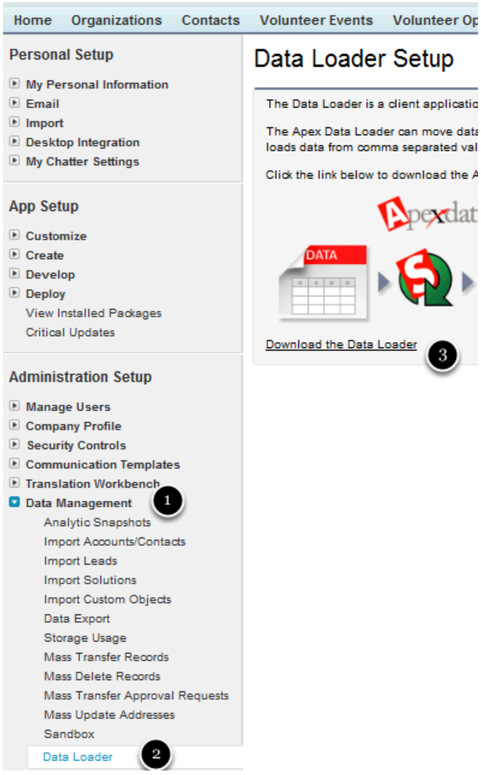
With the data loader you can:

- 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 wizareds)
- 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

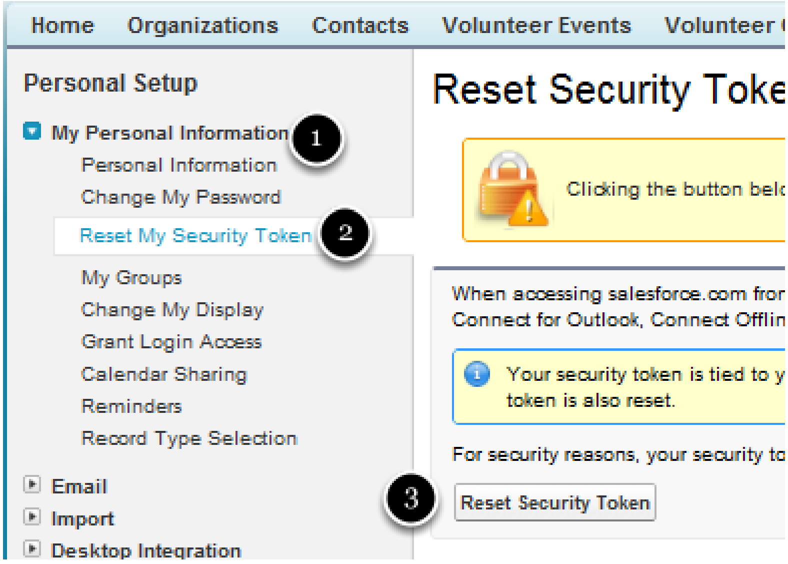


After clicking "Download the Data Loader" save the ApexDataLoader.exe file to your system.

Once the file has been saved, run the ApexDataLoader.exe file and follow the Install Wizard steps.

Security Token

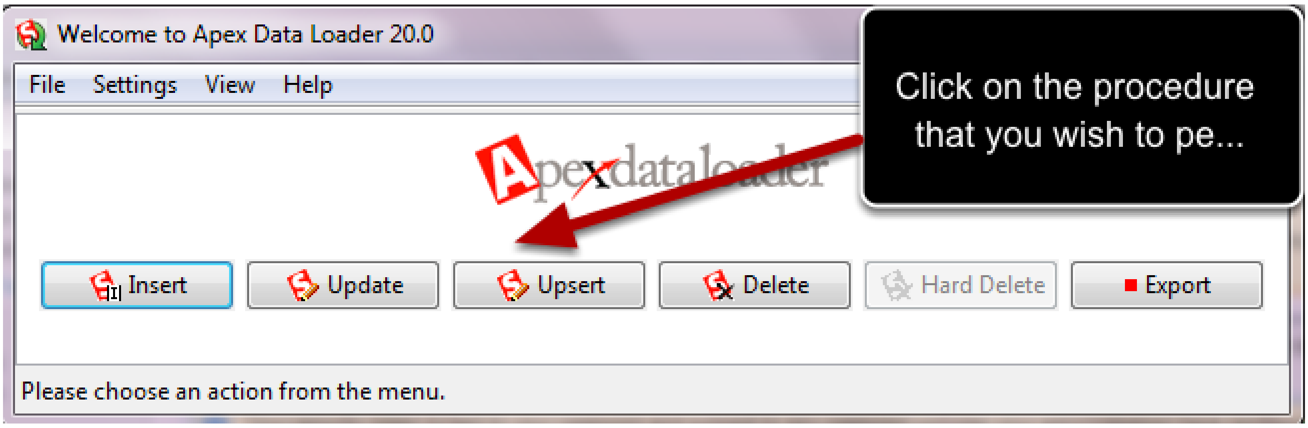
In order for you to use the Apex Data Loader you will need to have the unique security token associated with your UserID. If you are going to be using the data loader often, then maintain the security token in a secure location to avoid having to reset it often.



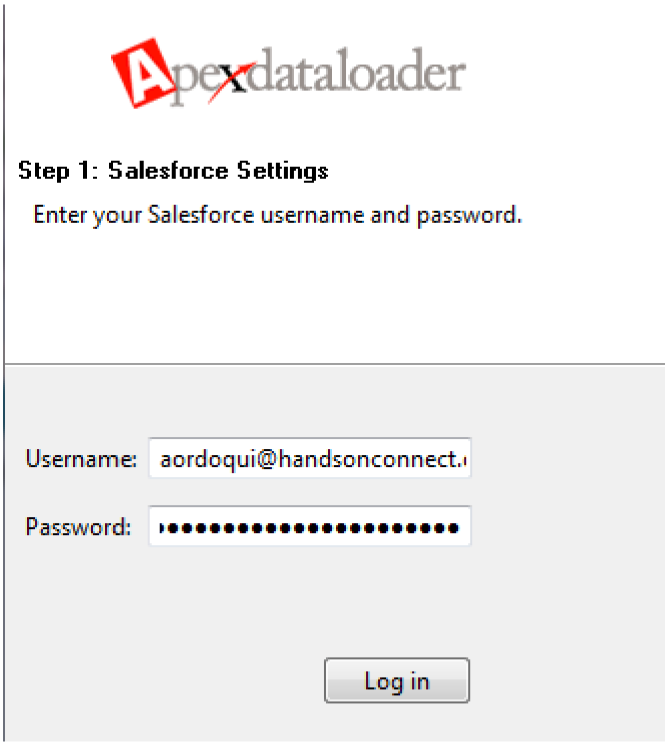
The Security Token is sent to the email address associated with your user account.

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.



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"

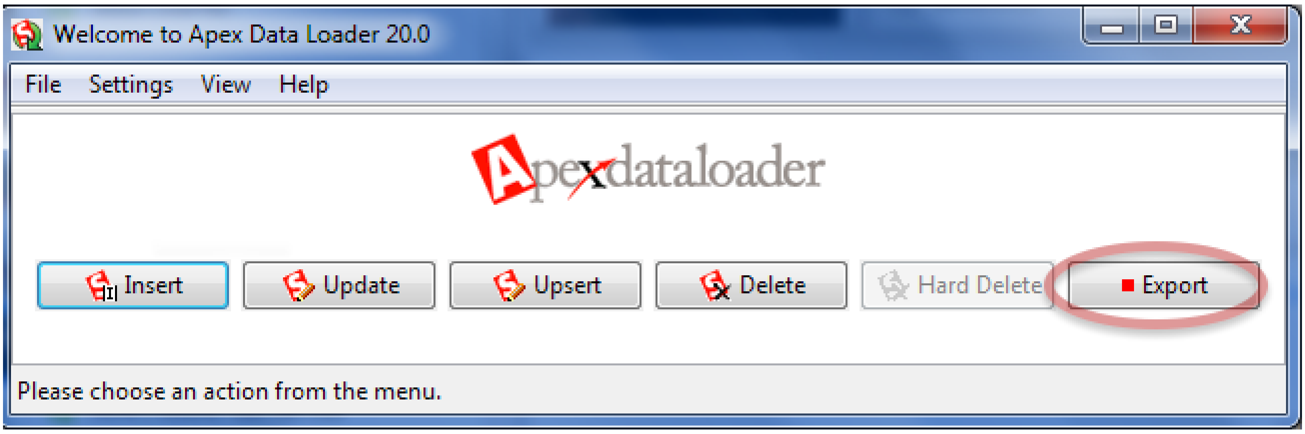
Exporting Records using the Apex Data Loader

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

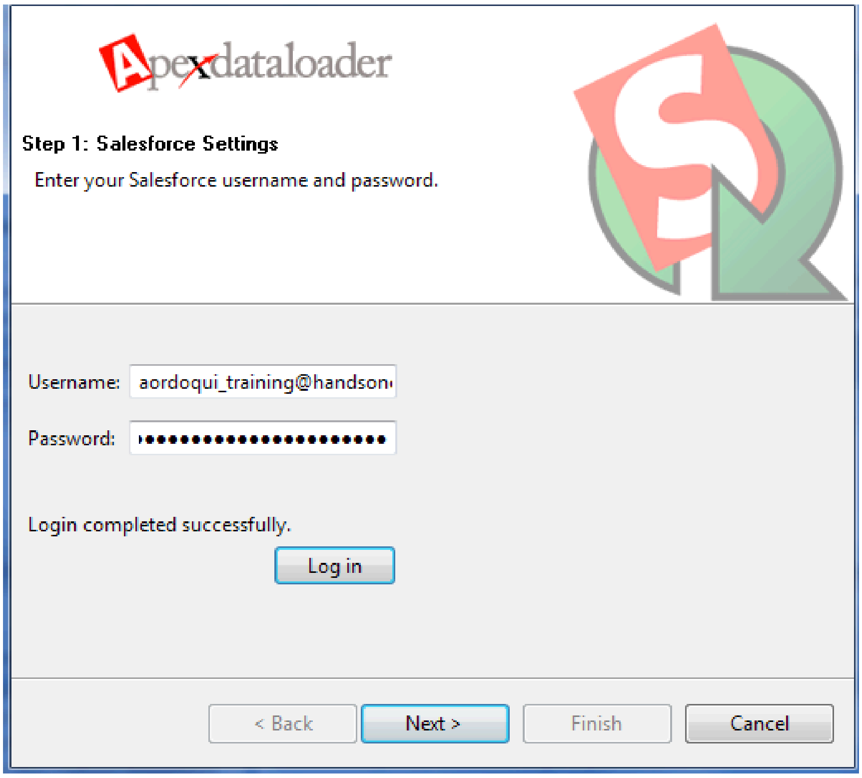
Open the Apex Data Loader and Select Export



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

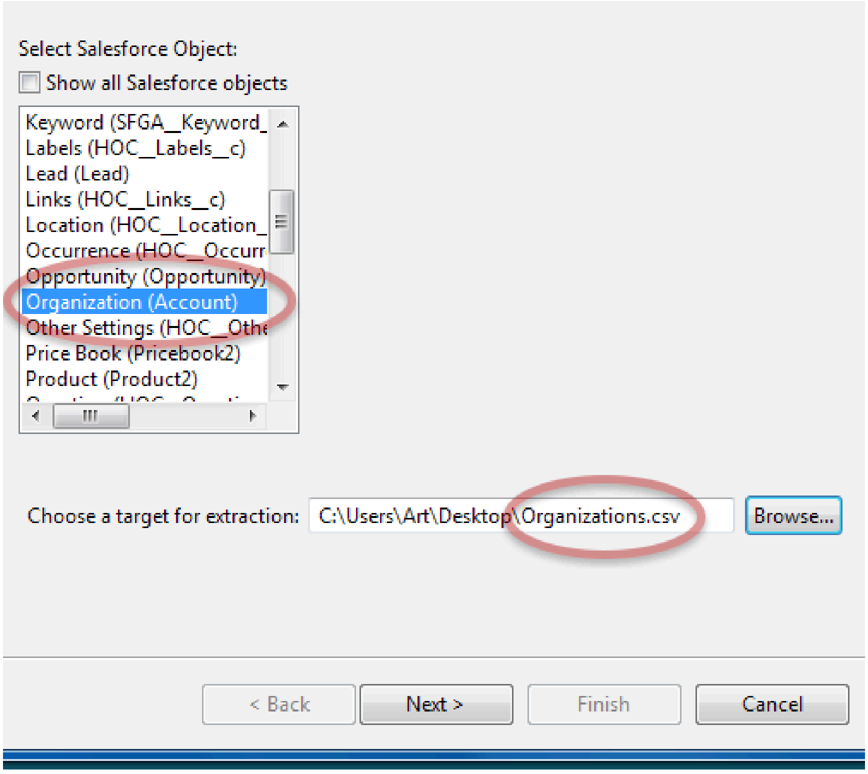


From the Select Salesforce Object

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 if for updating the records through the Data Loader.

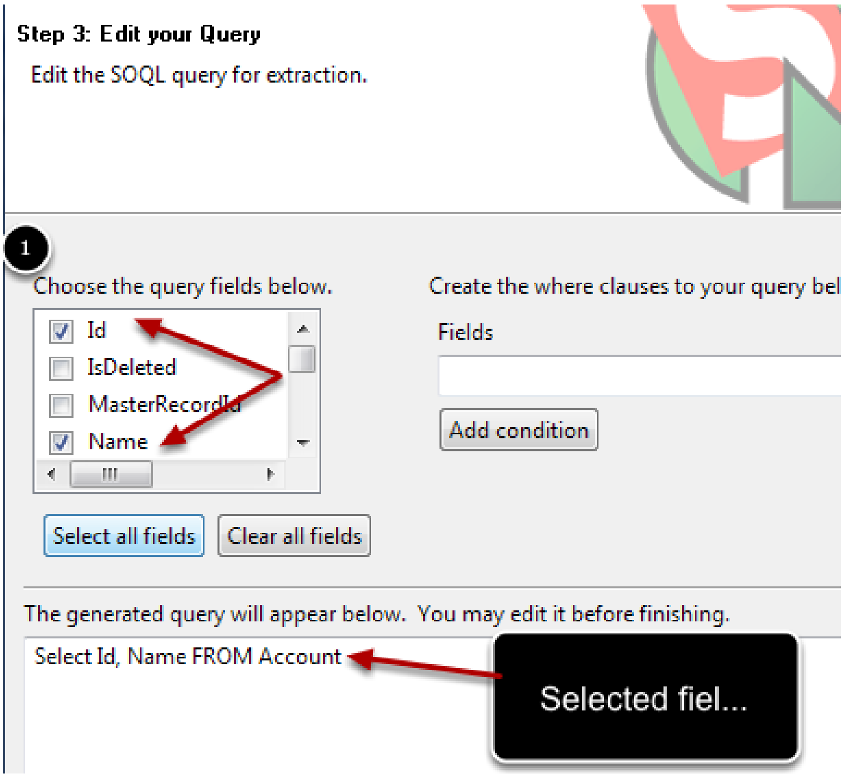
Then click Next



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



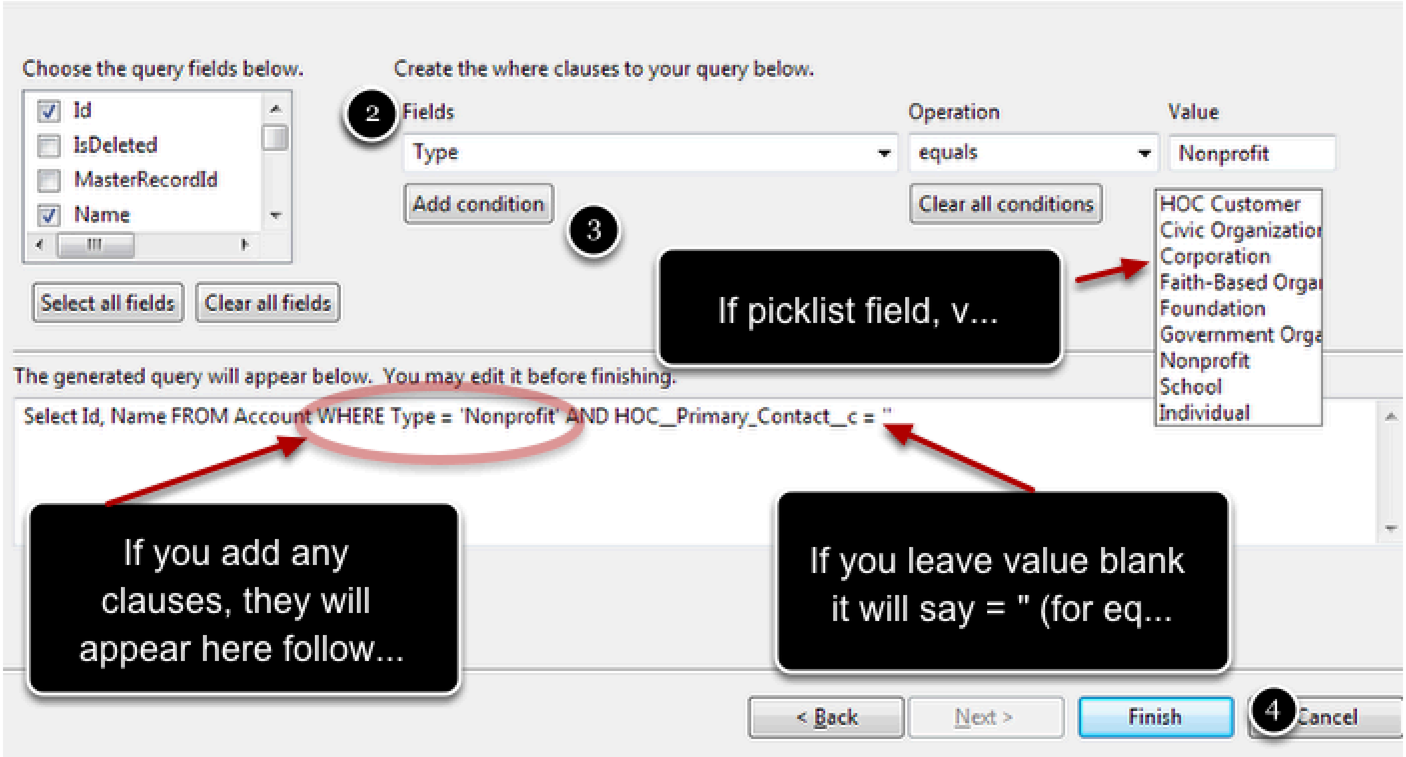
2) You can then select the clauses or filters for the query.

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.

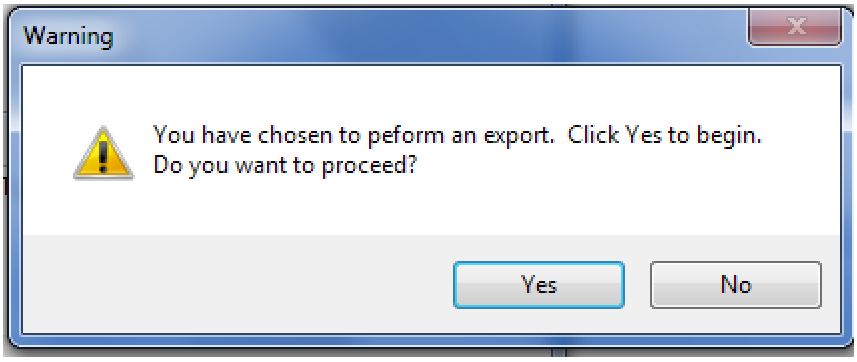
Value: Enter any value that would be available or present in the selected field. Can leave blank if you want records that either contain no information in that field (field equals blank) or contains some information in that field regardless of what that information is (field not equals blank).

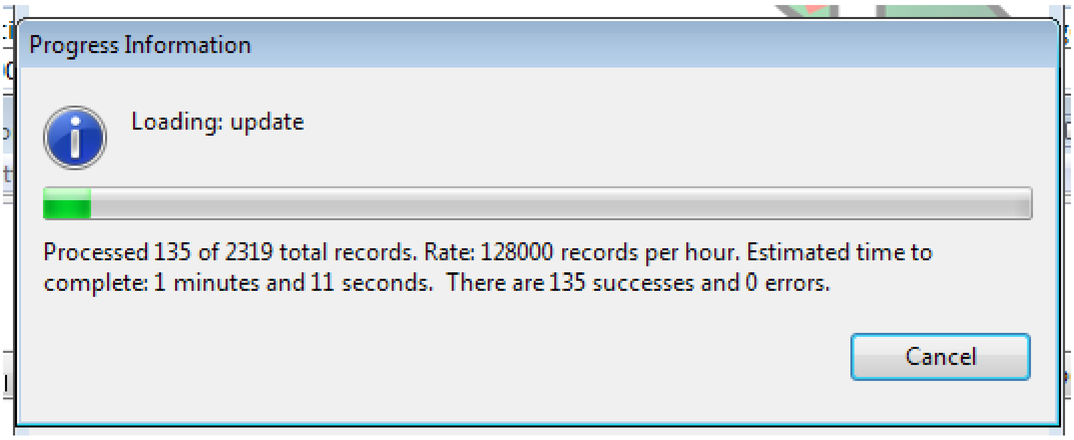
3) Once you've set the clause, click on Add Condition. (**Note:** you can add multiple clauses/filters to your query one at a time.)



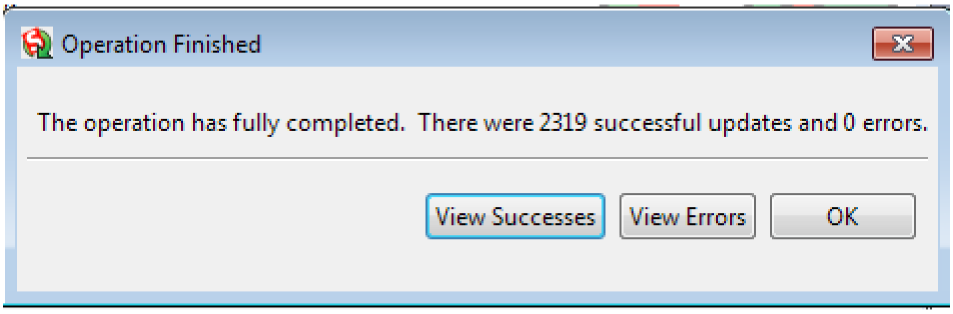
4) Once you have set the fields and clauses, click Finish.

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.

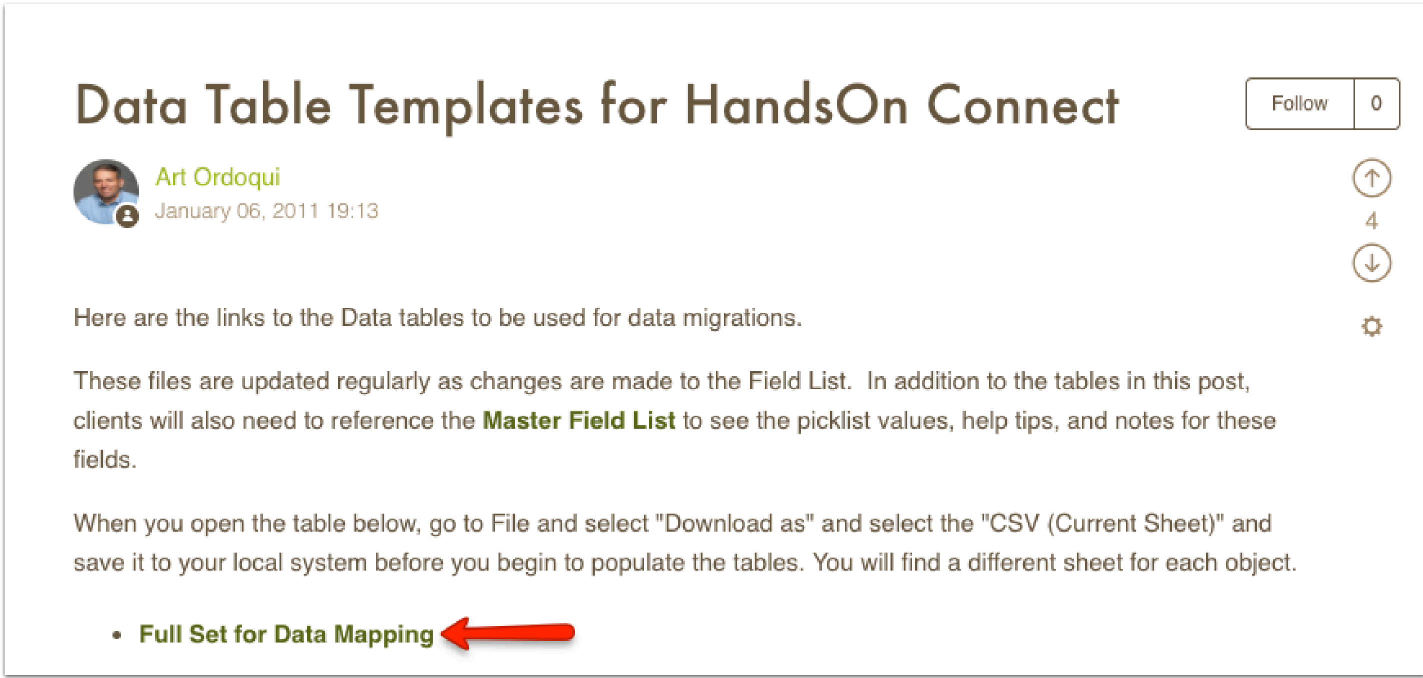
Importing Occurrences via the Data Loader

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.

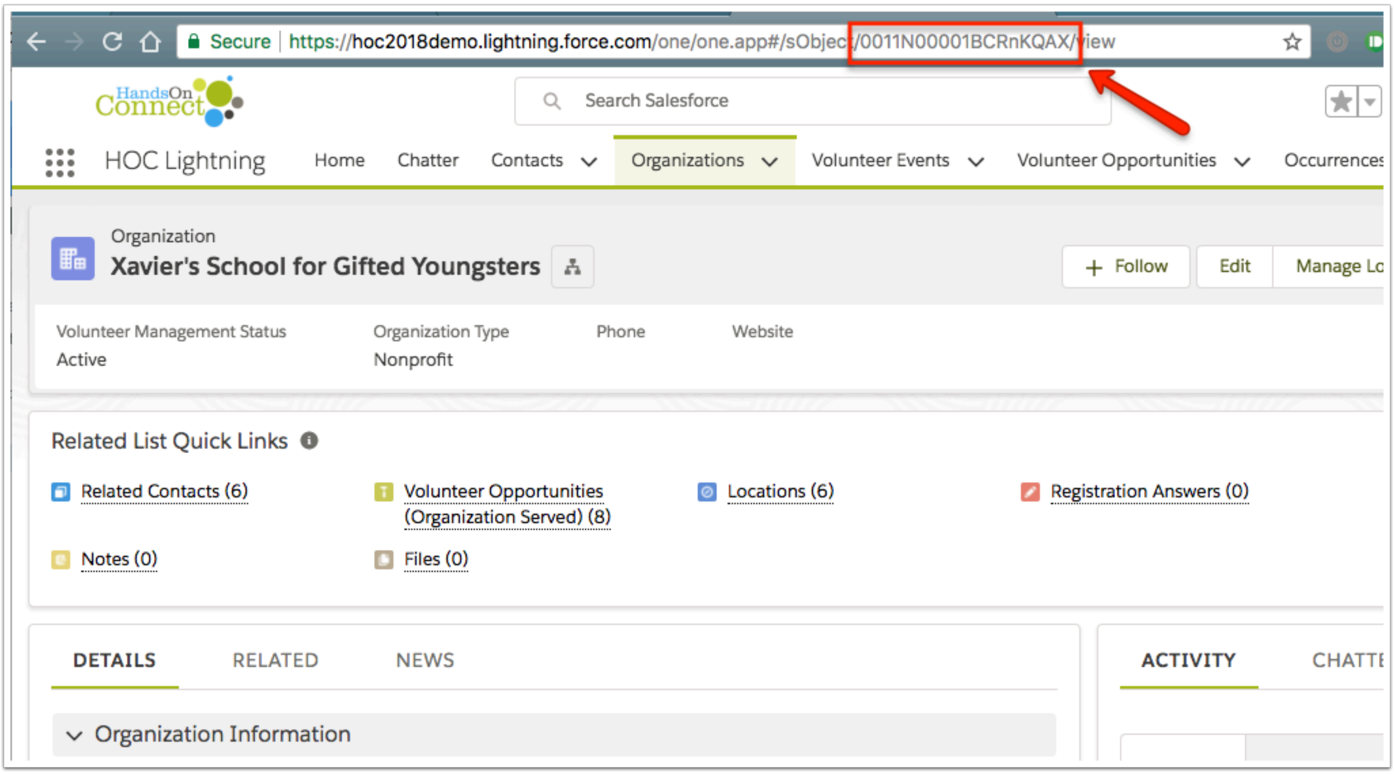


Prepare Your Data

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

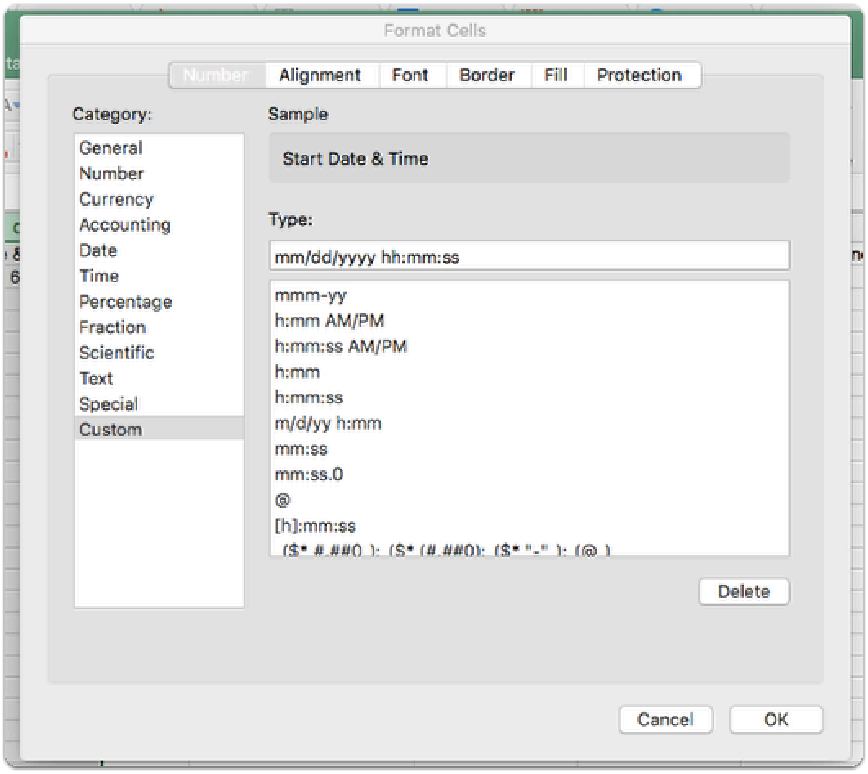
- Volunteer Opportunity = ID of the volunteer opportunity to which you are adding occurrences (can either be the Import ID or Salesforce ID)
- Start Date & Time
- End Date & Time
- Location = ID of the location for each occurrence
- Registration Cutoff (hours)
- Status = Active
- Maximum Attendance
-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

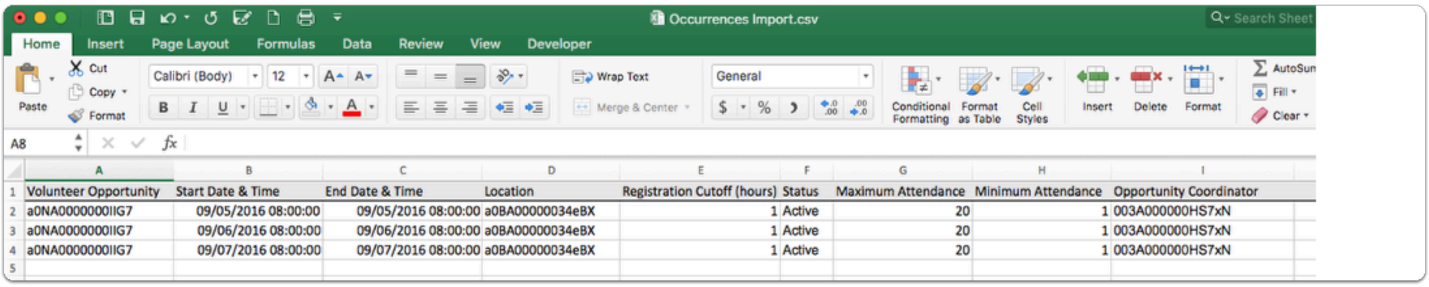
- Your end time must be after your start time.
- The occurrence start and end dates must occur during the same day.
- These dates must be formatted correctly.

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

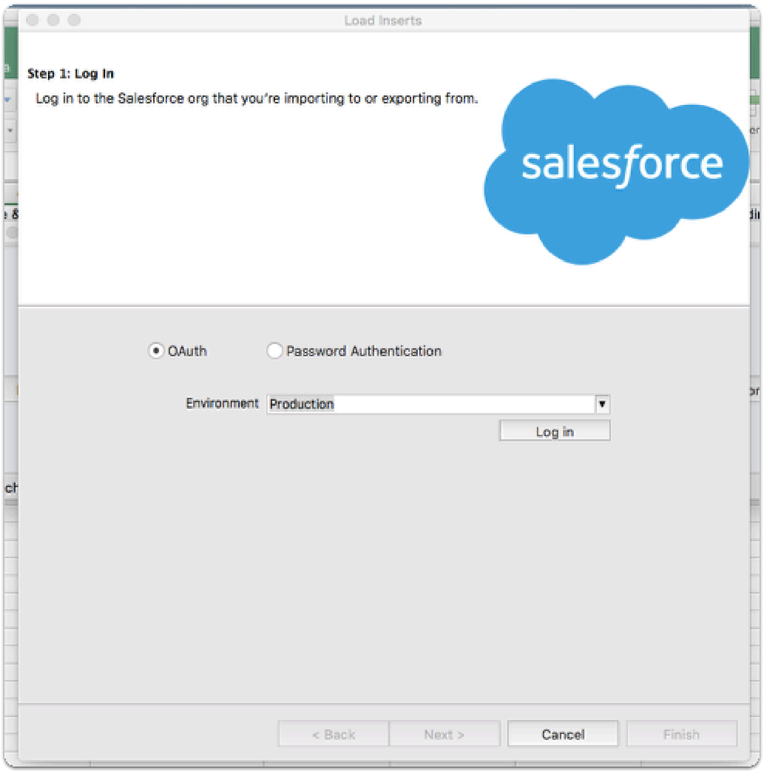
Here is an example of all of the fields necessary to import into the system. Save this file as a CSV, and you will then begin your import.



Volunteer Opportunity	Start Date & Time	End Date & Time	Location	Registration Cutoff (hours)	Status	Maximum Attendance	Minimum Attendance	Opportunity Coordinator
a0NA0000000IIG7	09/05/2016 08:00:00	09/05/2016 08:00:00	a0BA00000034eBX	1	Active	20	1	003A000000HS7xN
a0NA0000000IIG7	09/06/2016 08:00:00	09/06/2016 08:00:00	a0BA00000034eBX	1	Active	20	1	003A000000HS7xN
a0NA0000000IIG7	09/07/2016 08:00:00	09/07/2016 08:00:00	a0BA00000034eBX	1	Active	20	1	003A000000HS7xN

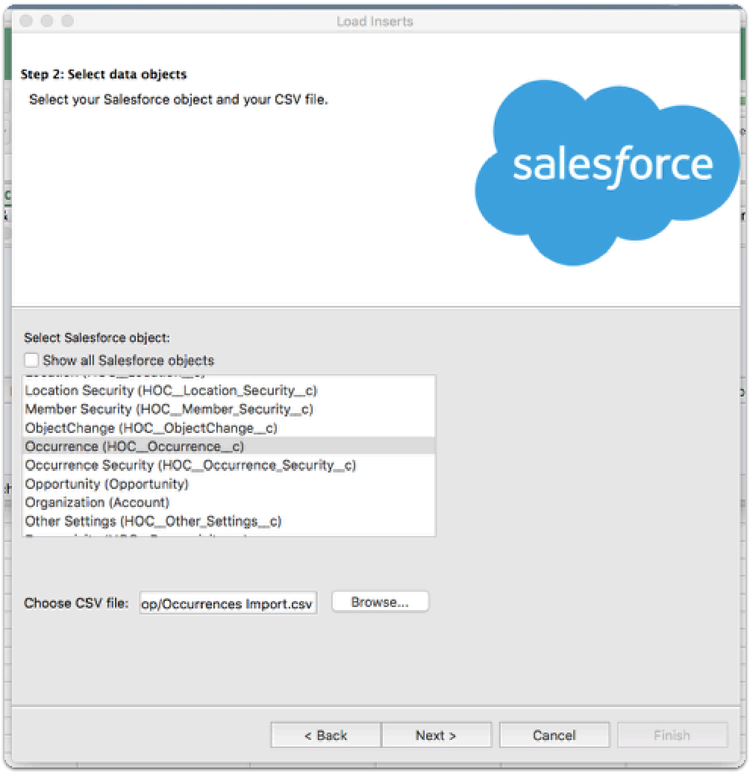
Open the Data Loader

Click on "Upsert" and then proceed to login to your system.



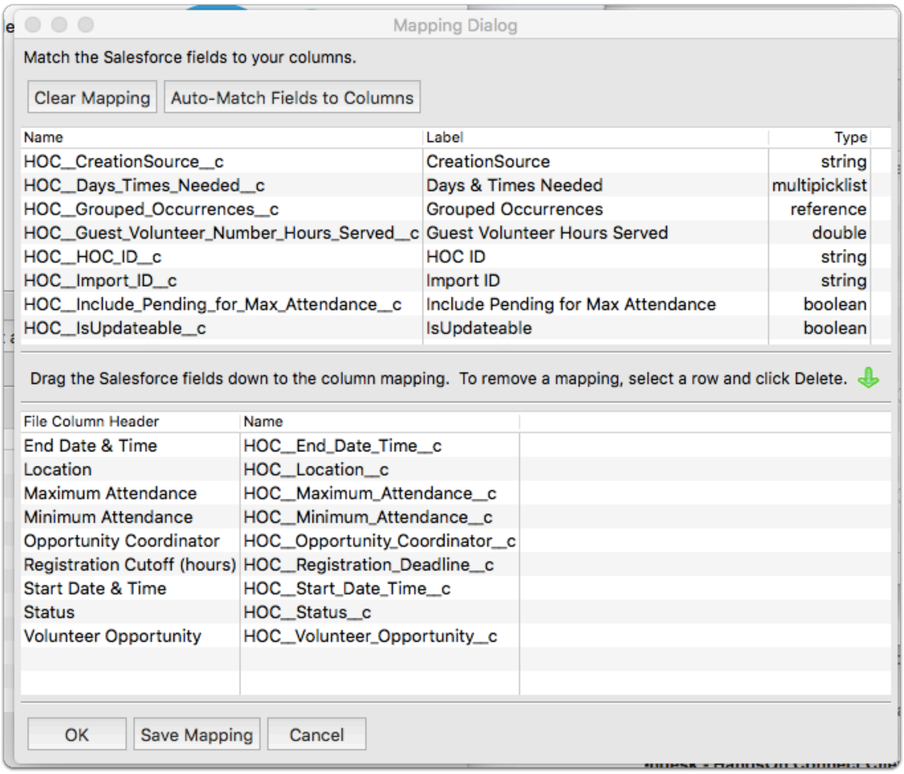
Link to the Occurrence Object

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."



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."



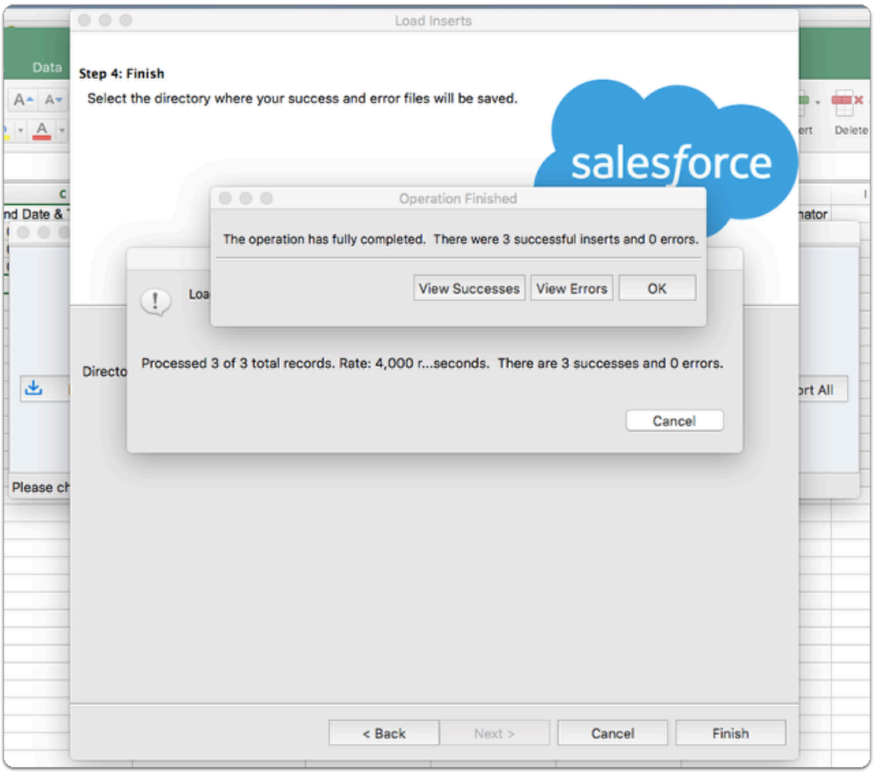
Select where to save the success/failure files

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

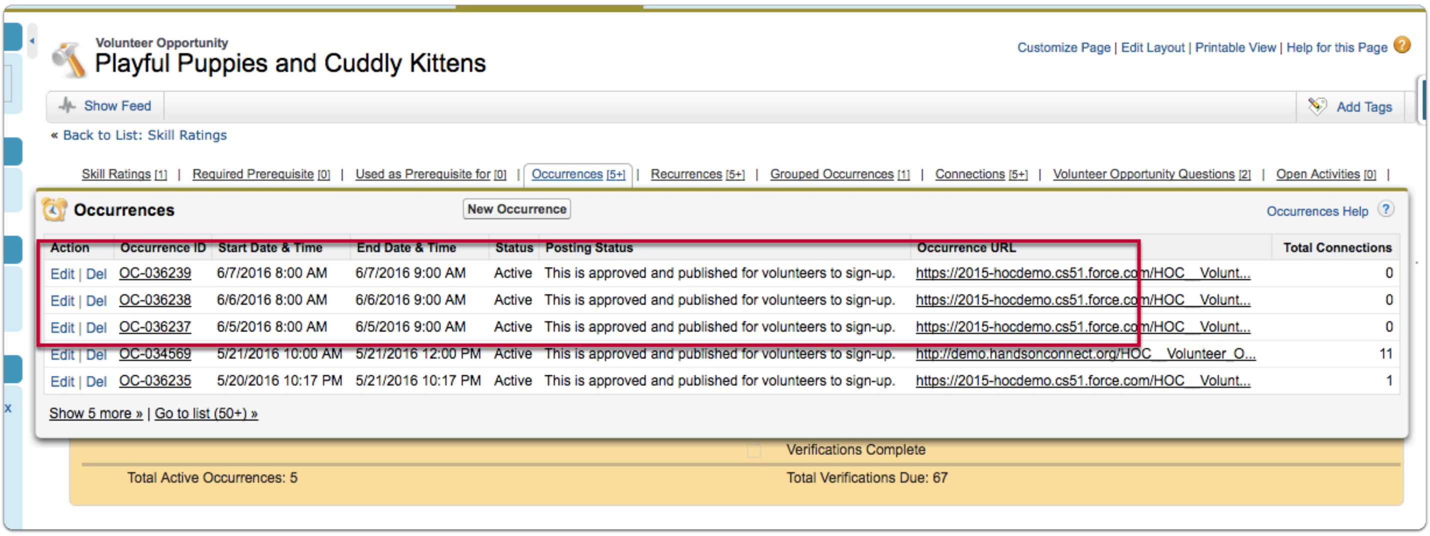
Click on "Finish" to begin the import. You will be prompted with a warning stating what you will be doing ("You have chosen to insert new records.") and you must confirm that this is what you wanted to do. As the data is being imported, you will see the successes and failures for the import.

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.



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

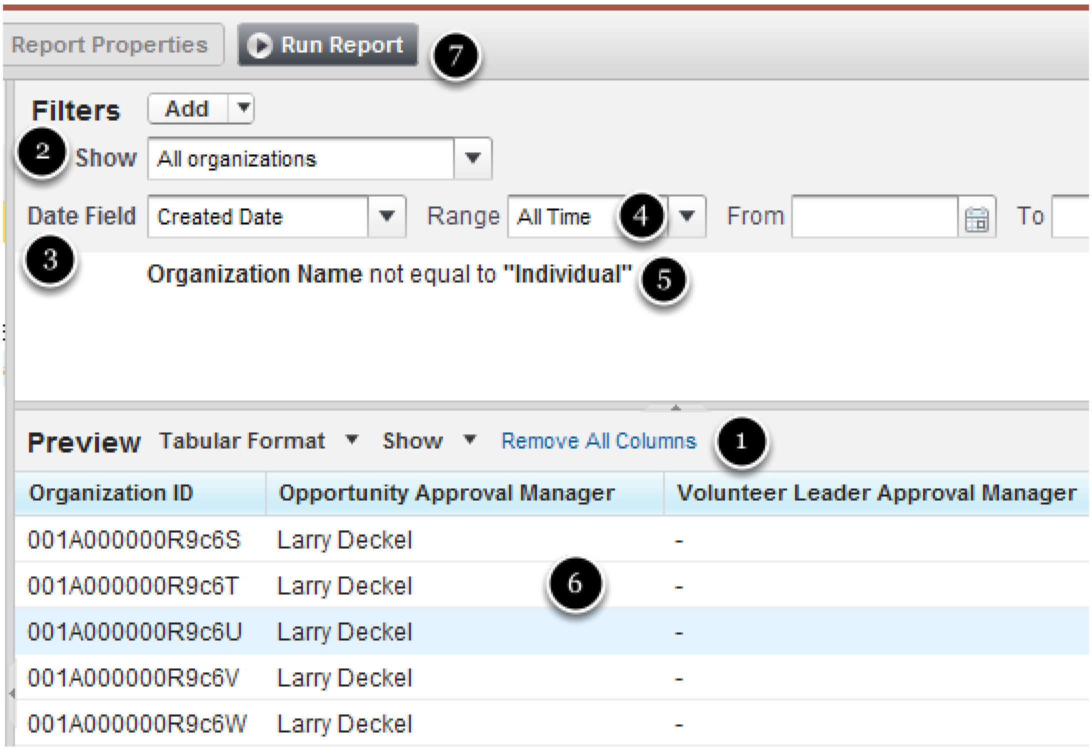
Volunteer Leader Approval Manager

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.



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.

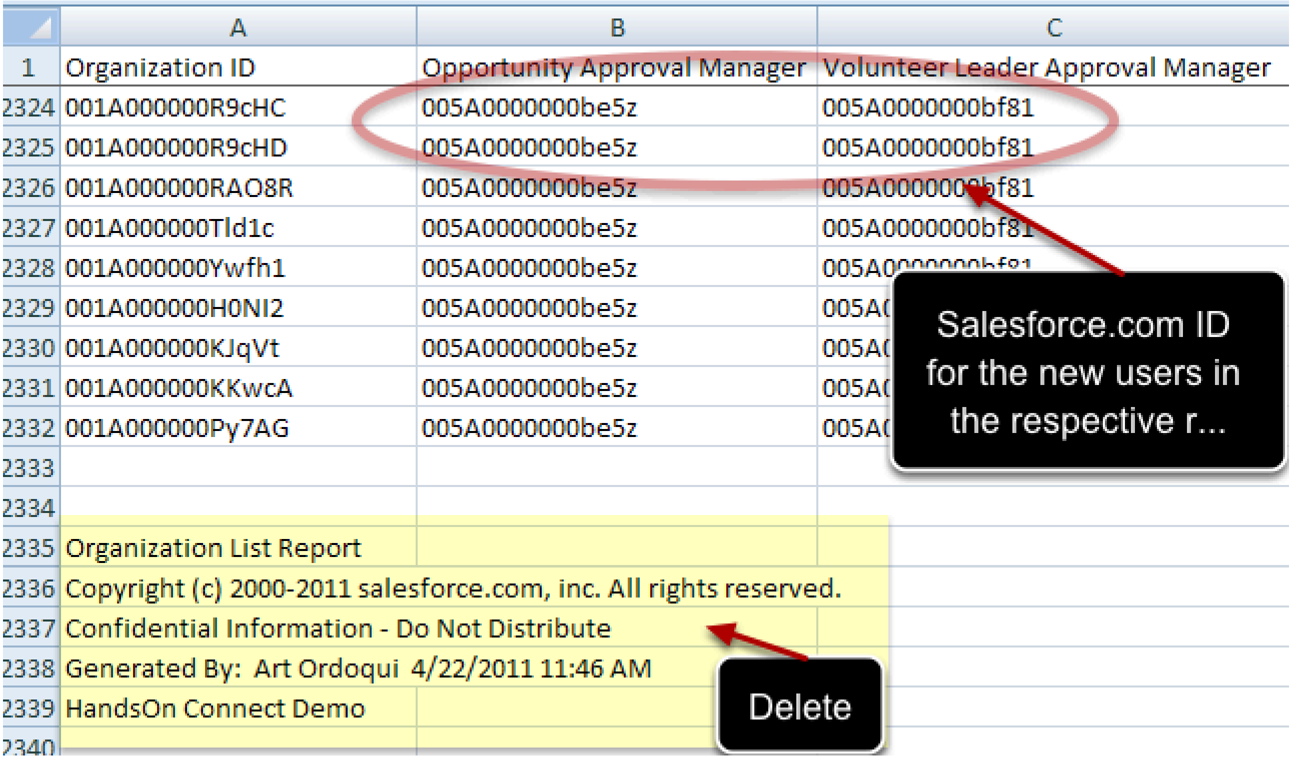
Find the User that will be in this new role and click on their name to go to the User Detail.

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

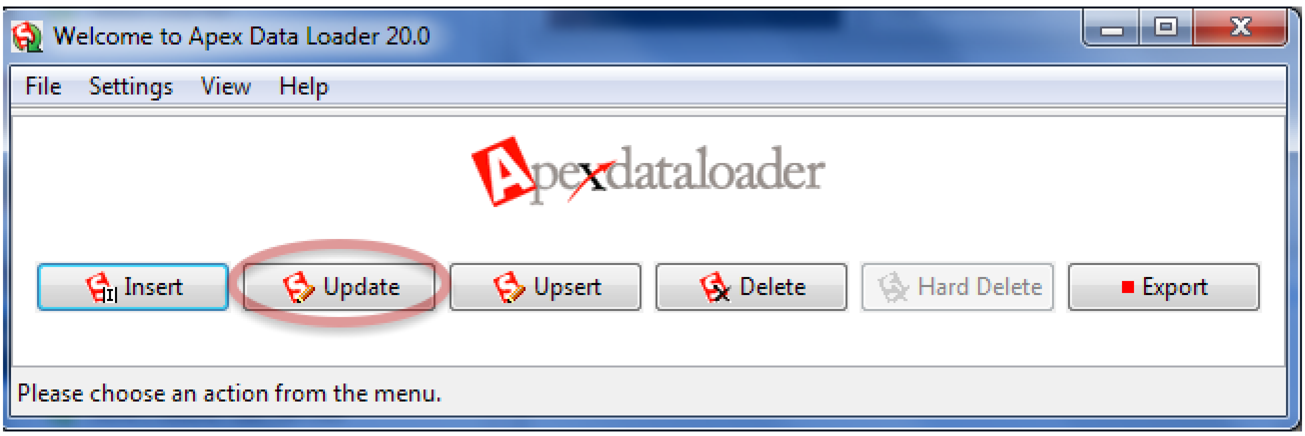
Save the changes to the table as a new file to update using the Data Loader.



	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	001A000000Tld1c	005A0000000be5z	005A0000000bf81
2328	001A000000Ywfh1	005A0000000be5z	005A0000000bf81
2329	001A000000H0NI2	005A0000000be5z	005A(
2330	001A000000KJqVt	005A0000000be5z	005A(
2331	001A000000KKwcA	005A0000000be5z	005A(
2332	001A000000Py7AG	005A0000000be5z	005A(
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

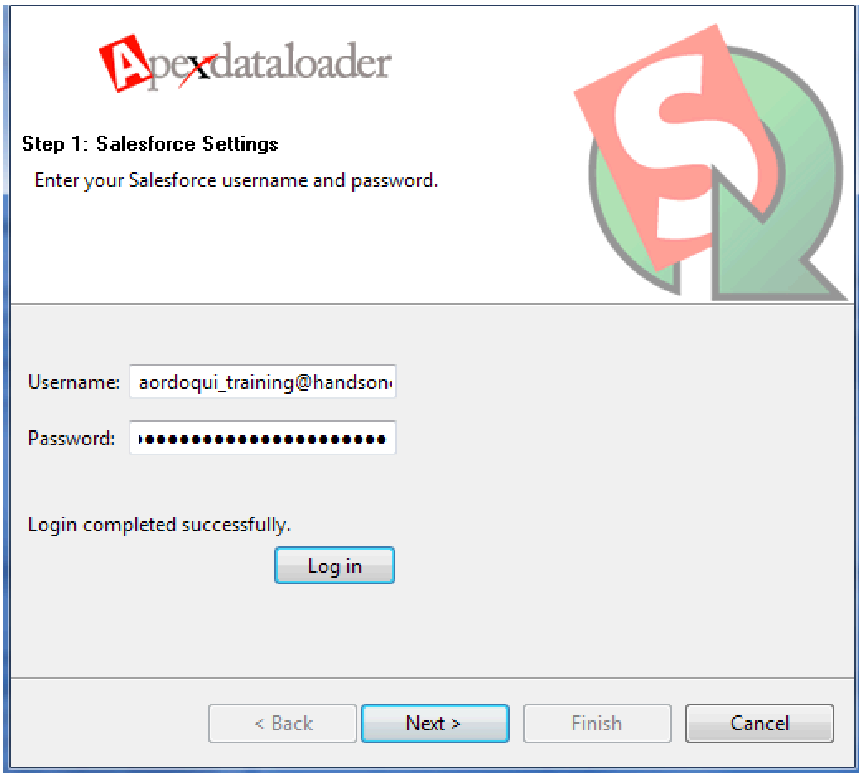
Open the Apex Data Loader and Select Update



Enter your username and password.

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

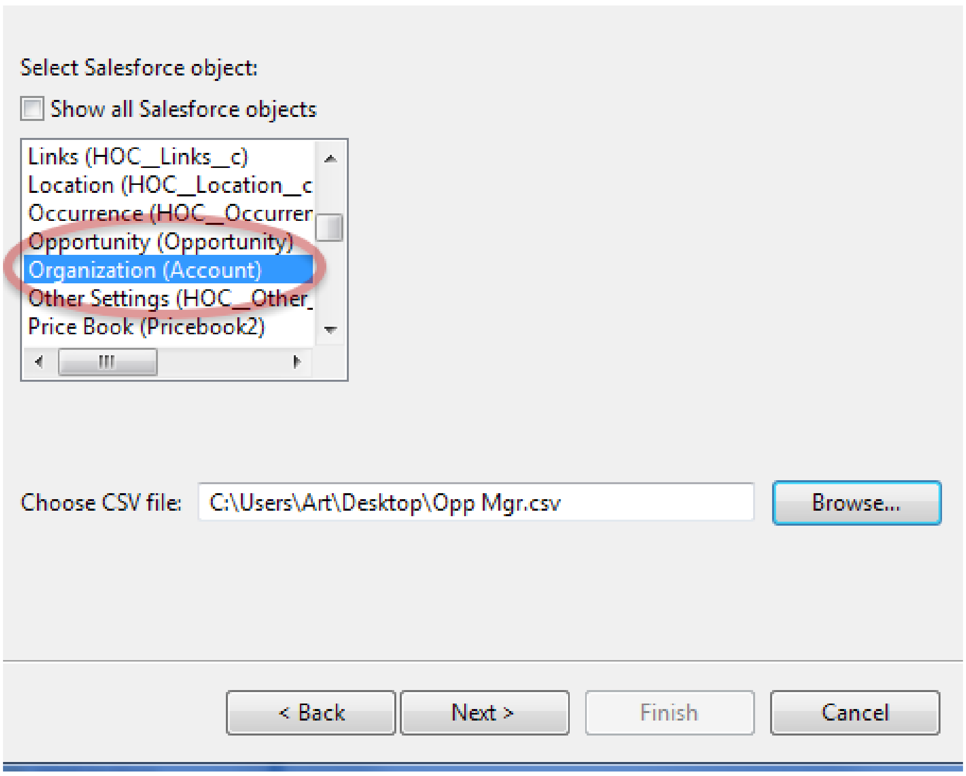
Click Login, and then once successful click Next



From the Select Salesforce Object- select Organization (Accounts)

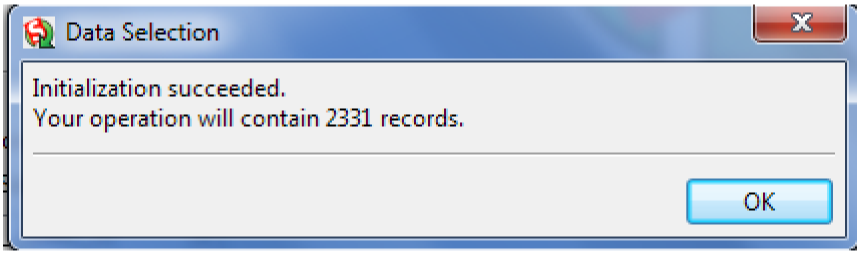
Then click Browse to locate the file with the update Opportunity and Volunteer Leader Approval Managers

Then click Next



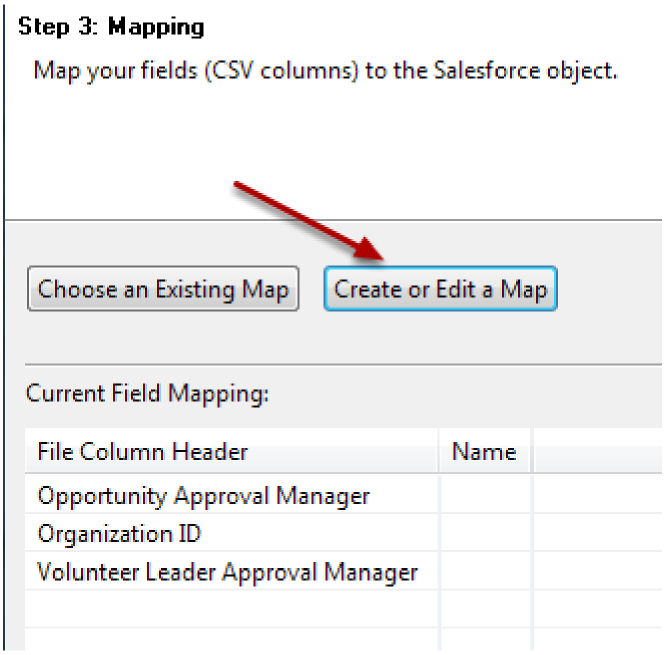
The system will initialize the file and confirm for you how many records (rows) are in your table.

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.

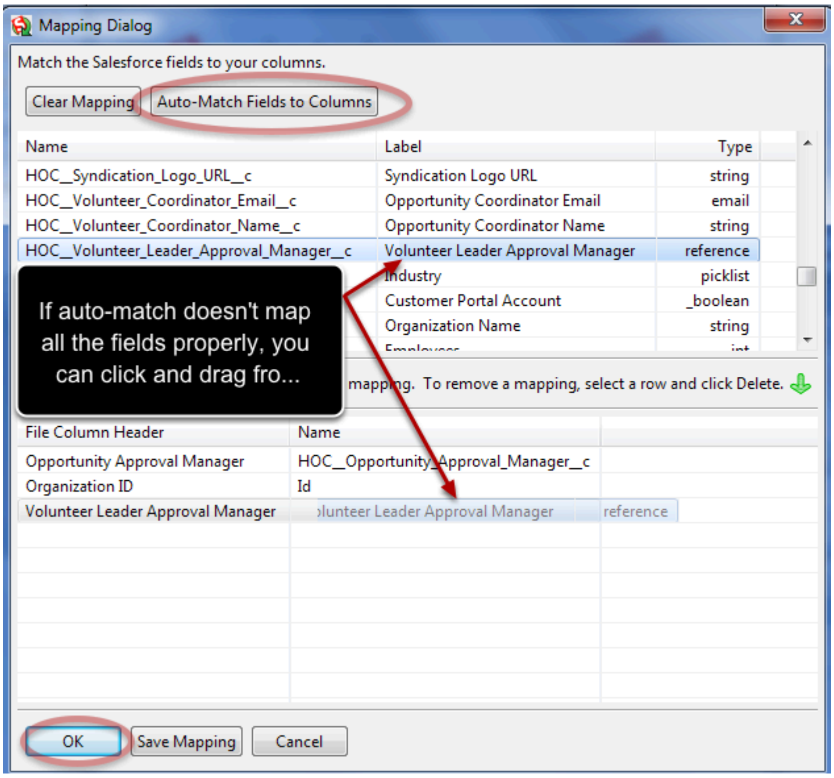
The fields should be mapped as follows:

Opportunity Approval Manager: HOC__Opportunity_Approval_Manager__c

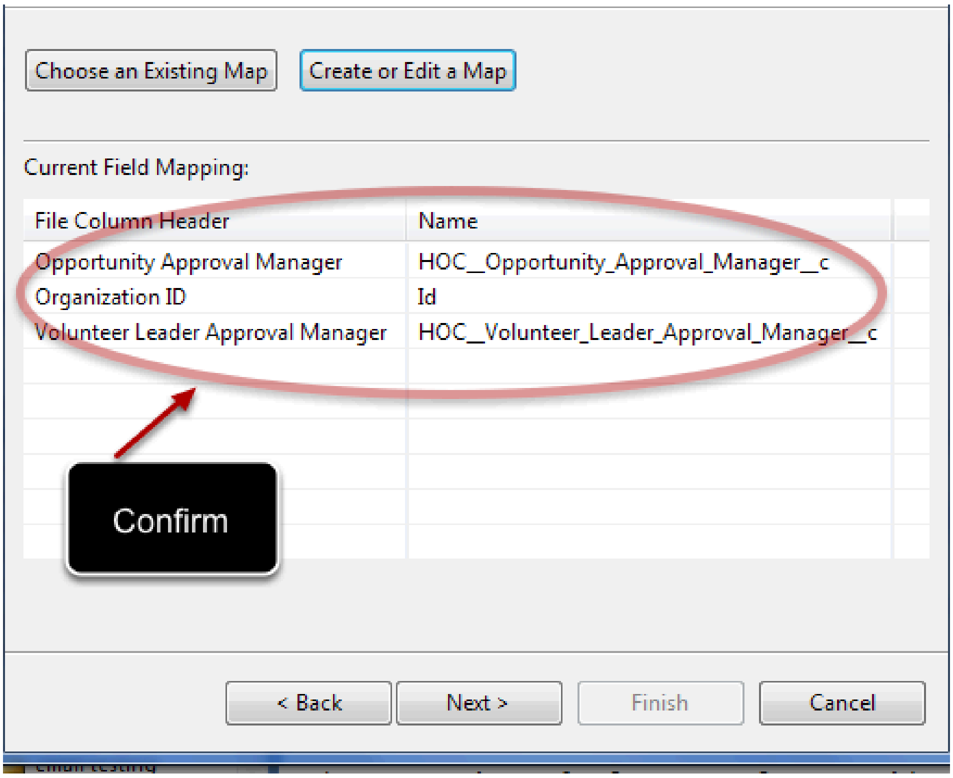
Organization ID: Id

Volunteer Leader Approval Manager: HOC__Volunteer_Leader_Approval_Manager__c

3) Once all the fields are mapped as needed, click on OK

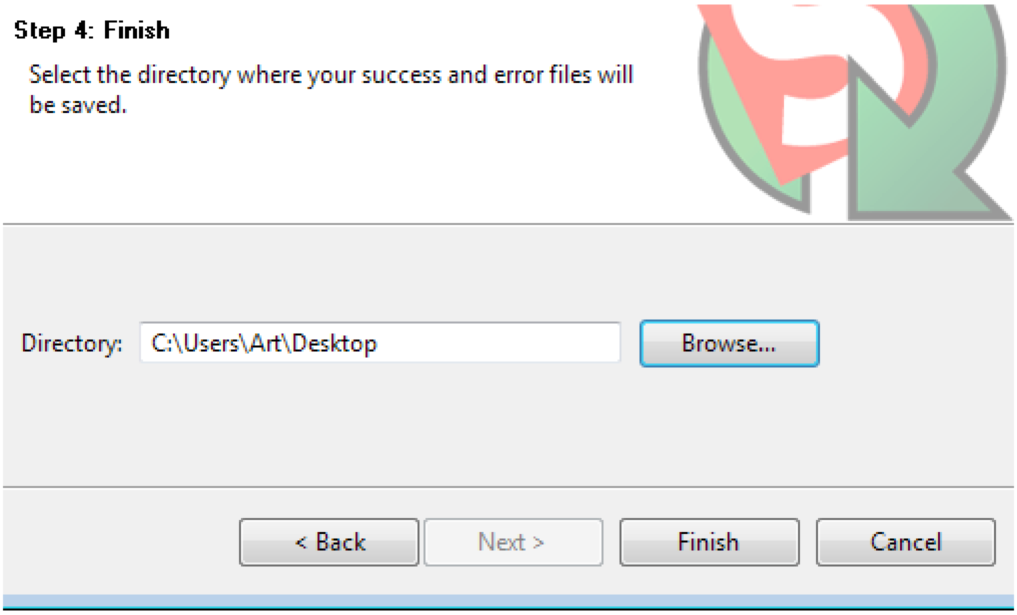


Confirm that your fields are mapped correctly and click Next

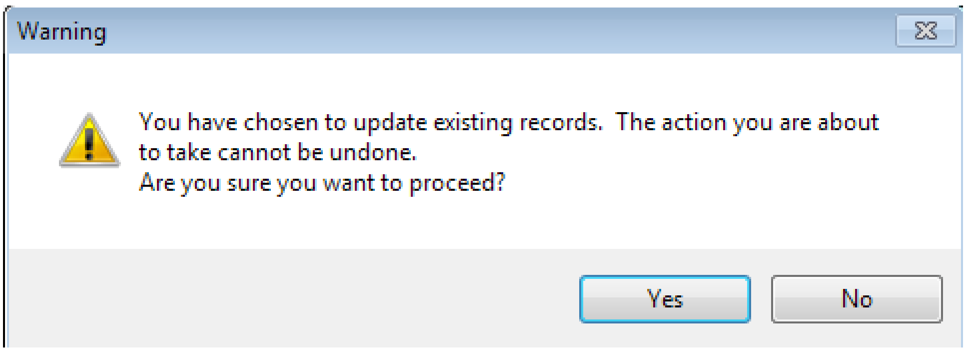


Every time you use the Data Loader, two log files are created, an error log and a success log. Click Browse to identify a location where you want those logs saved.

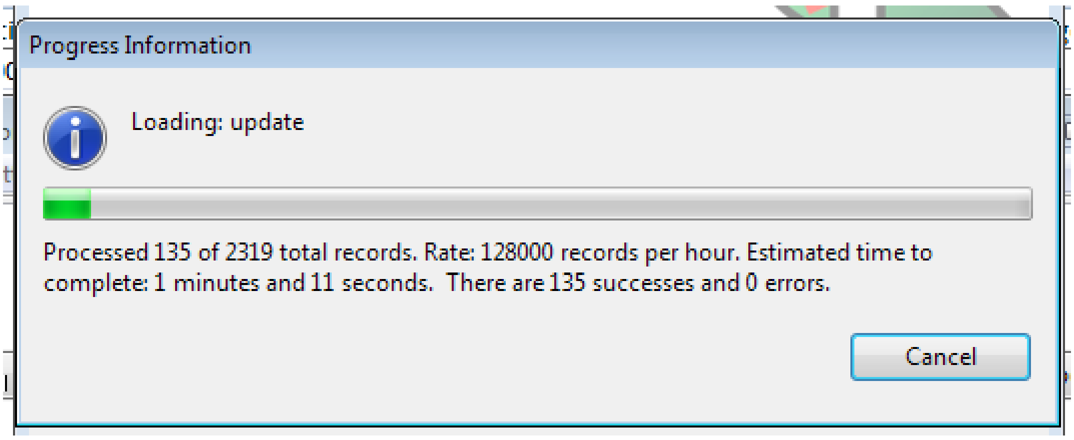
Once you have identified the location for the log files, click Finish.



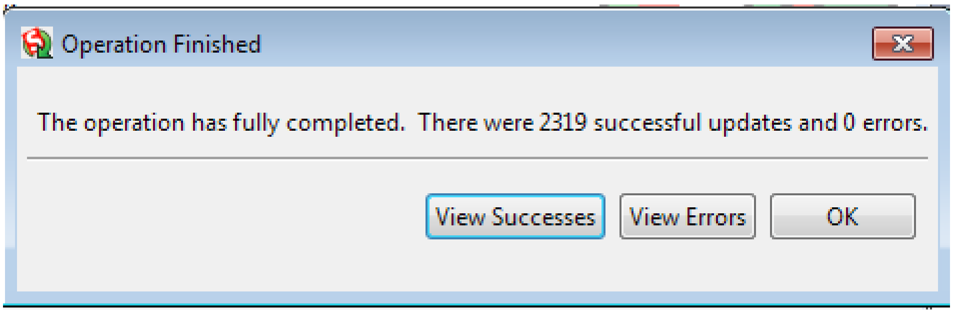
It will provide you with a warning message that once updated, it can't be undone. Click OK



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)

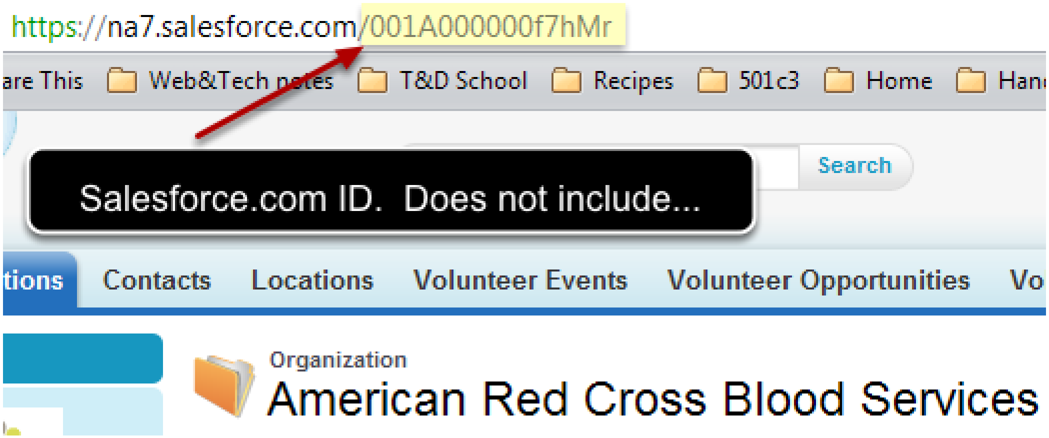
Private (privacy of the note)

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

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)

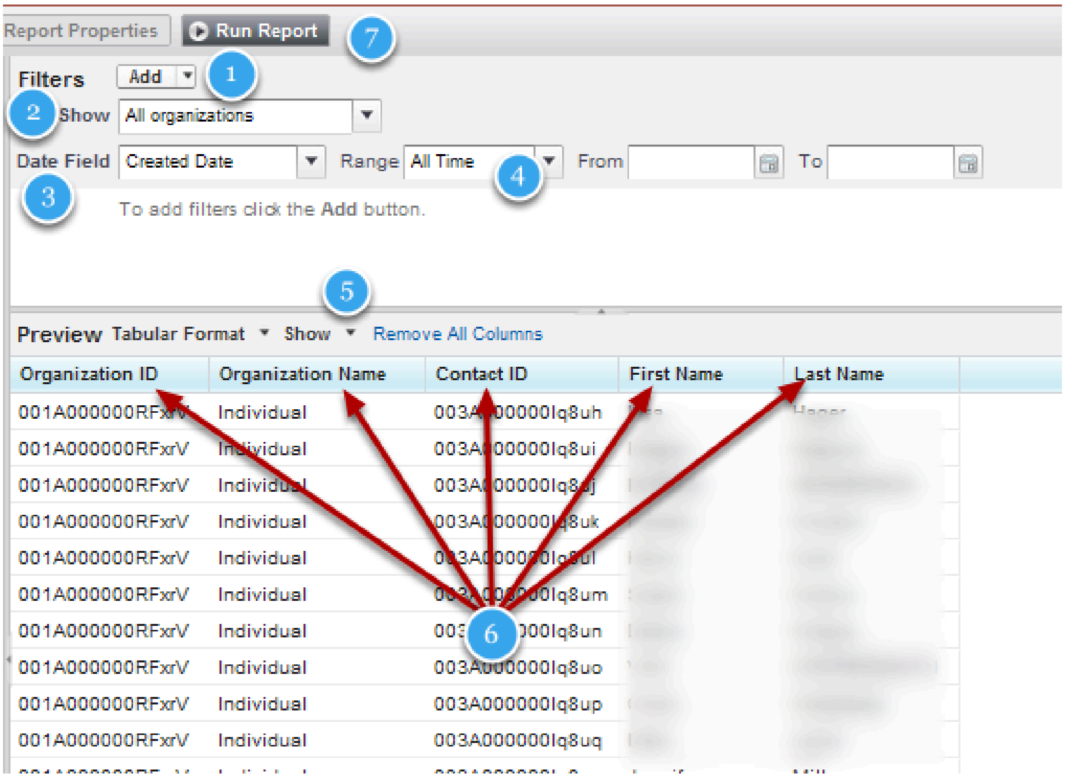
Organization Name

Contact ID (Salesforce.com ID field)

First Name

Last Name

7) Run Report



Populating the Table

Once you have the Saleforce.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)

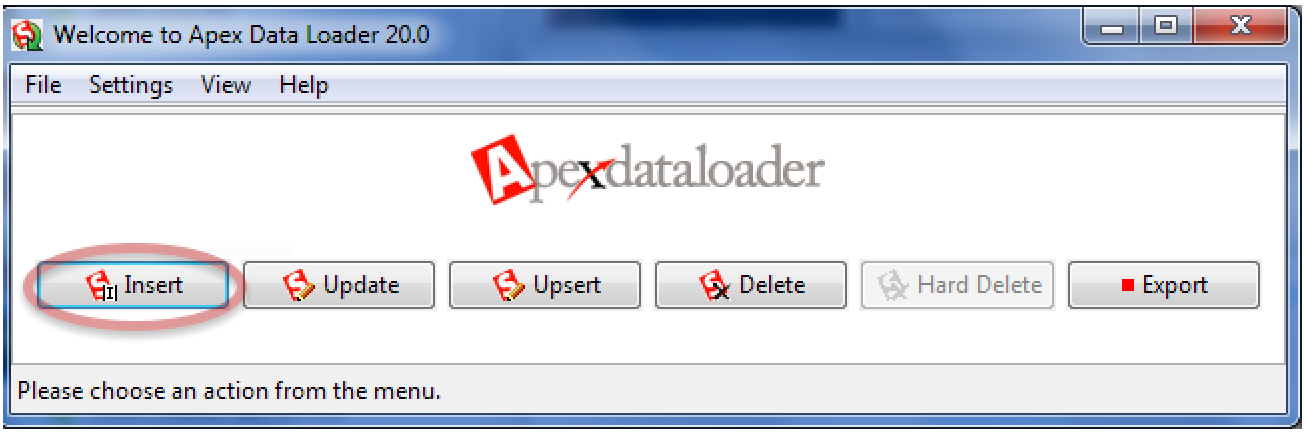
Private (Should be populated with TRUE or FALSE)

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

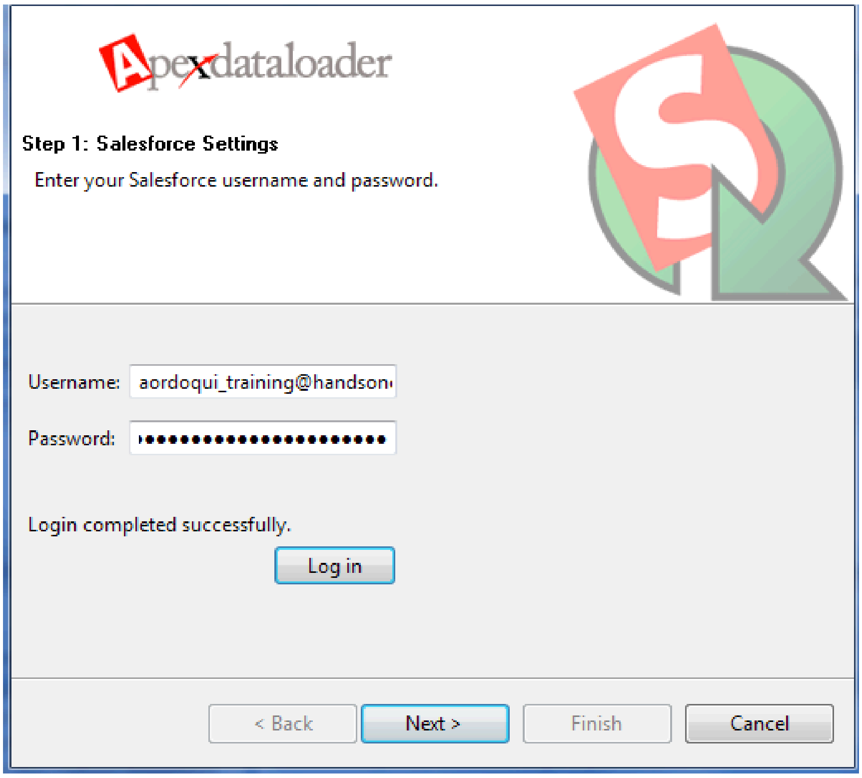
Open the Apex Data Loader and Select Insert



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



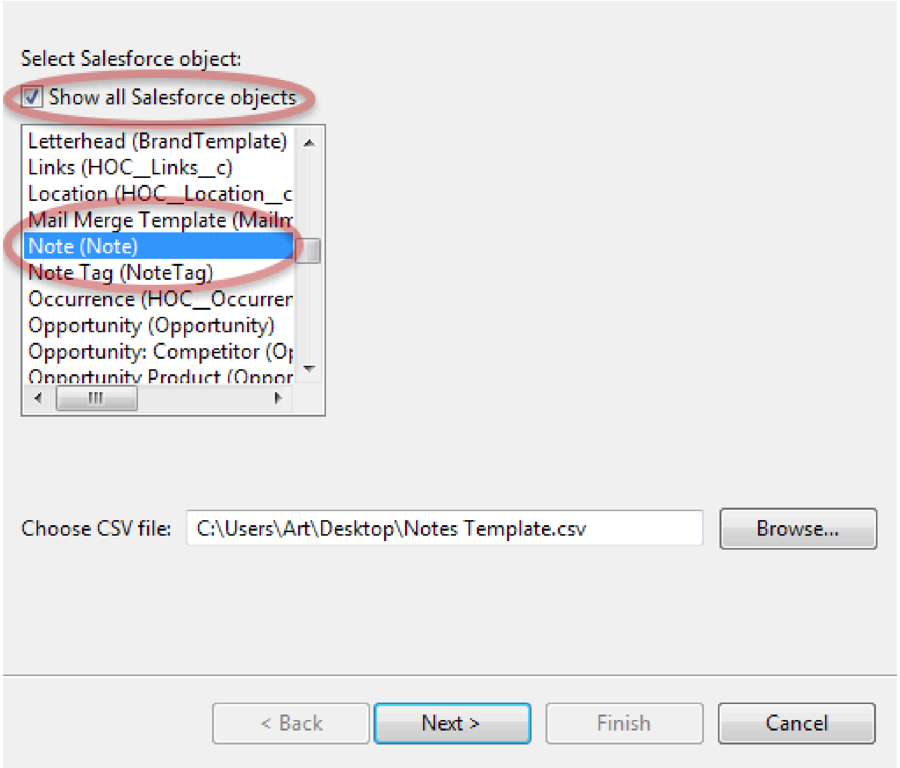
From the Select Salesforce Object

1) Check the box for Show all Salesforce objects

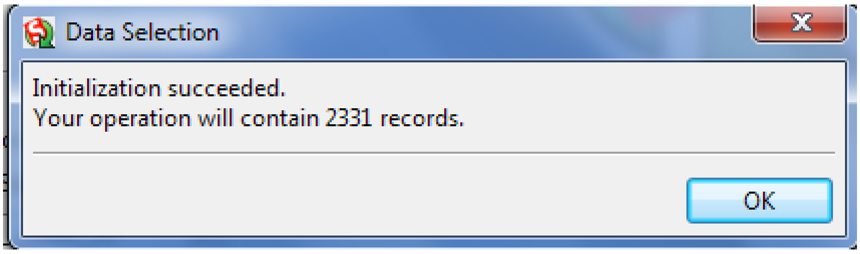
2) Select Note (Note)

Then click Browse to locate the file with the notes

Then click Next

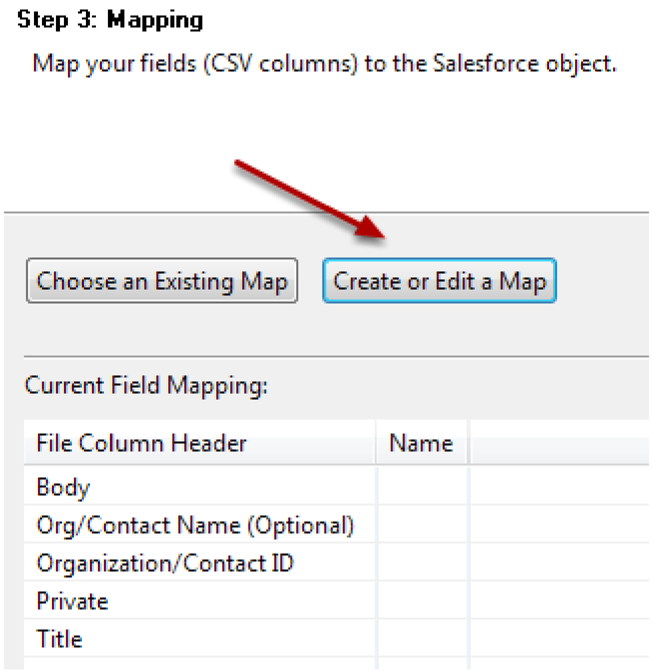


The system will initialize the file and confirm for you how many records (rows) are in your table. Click OK.



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 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:

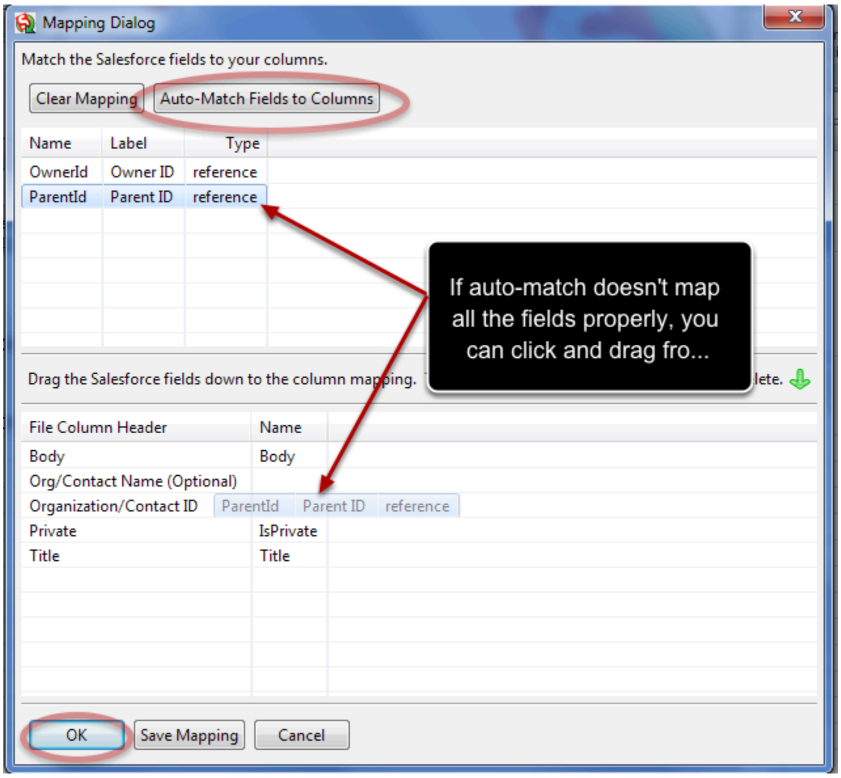
Body to Body

Organization/Contact ID to ParentId

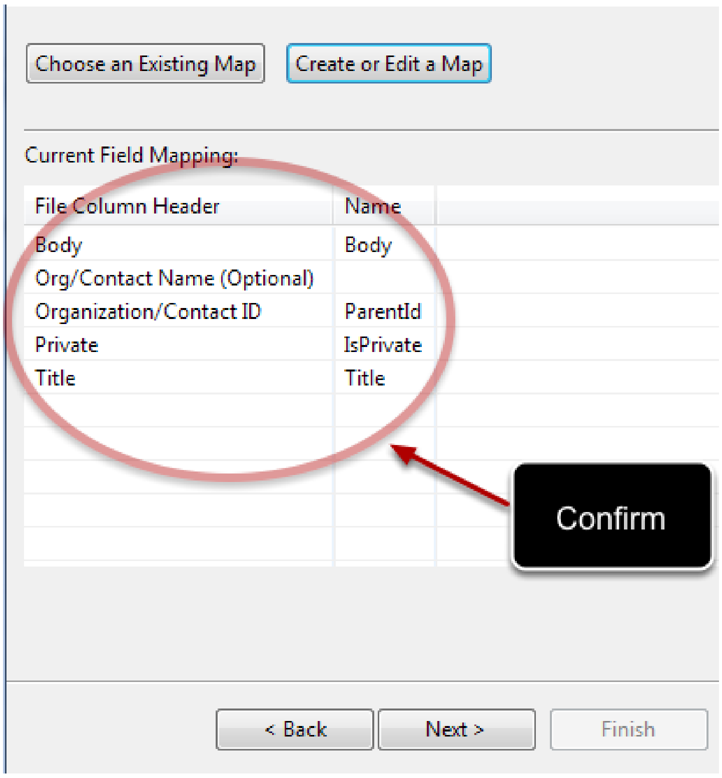
Private to IsPrivate

Title to Title

3) Once all the fields are mapped as needed, click on OK

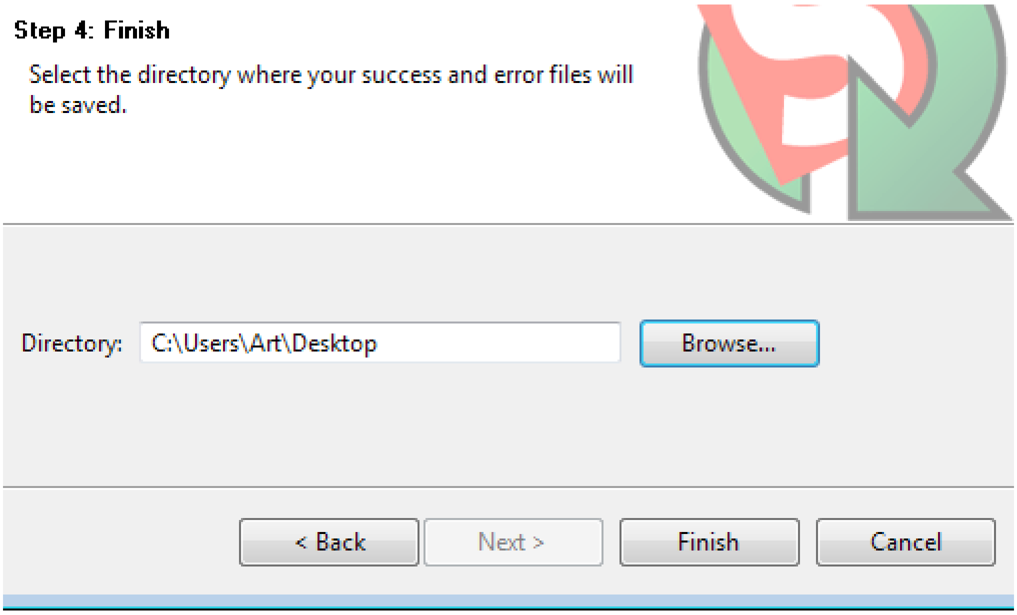


Confirm that your fields are mapped correctly and click Next

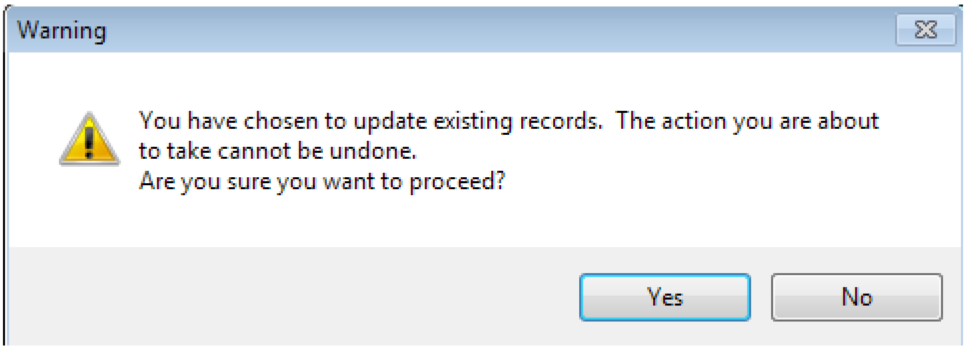


Every time you use the Data Loader, two log files are created, an error log and a success log. Click Browse to identify a location where you want those logs saved.

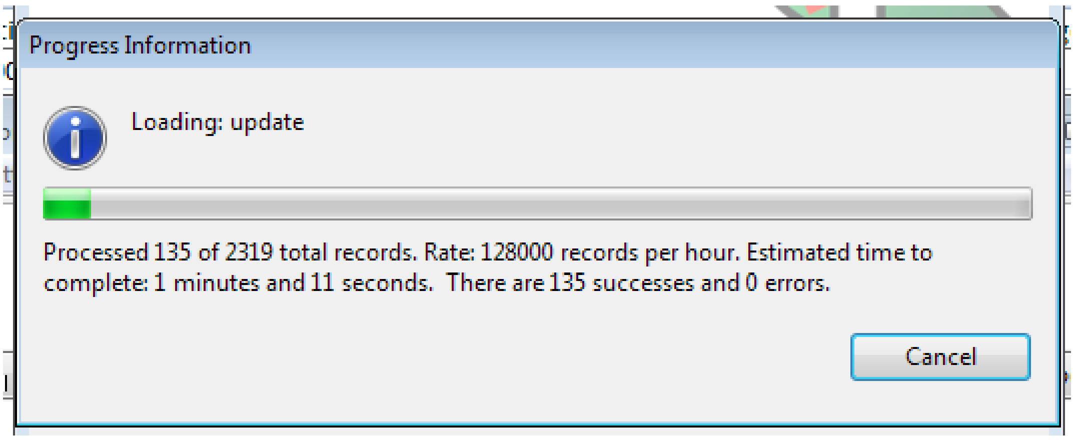
Once you have identified the location for the log files, click Finish.



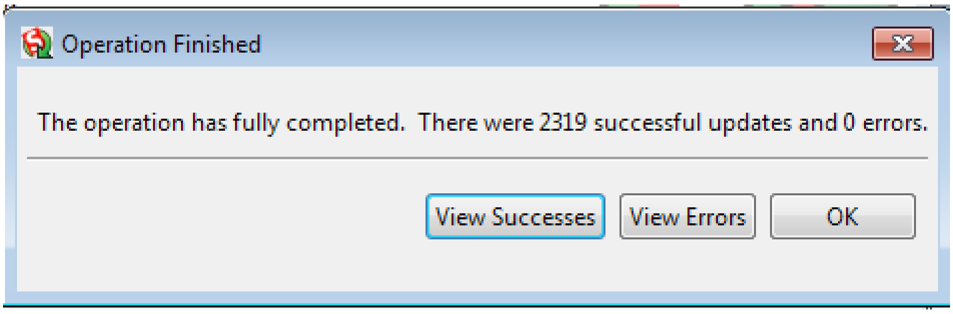
It will provide you with a warning message that once updated, it can't be undone. Click OK



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.

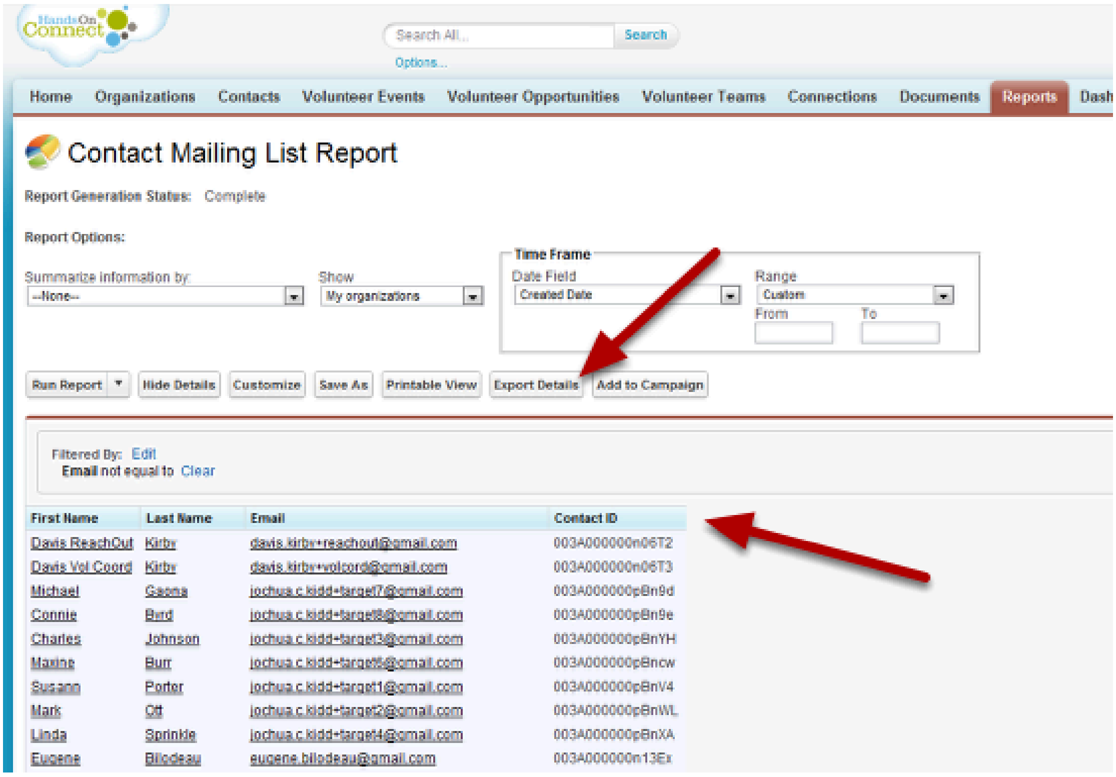


Once it is completed, please check to ensure that the Notes were Imported properly.

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.



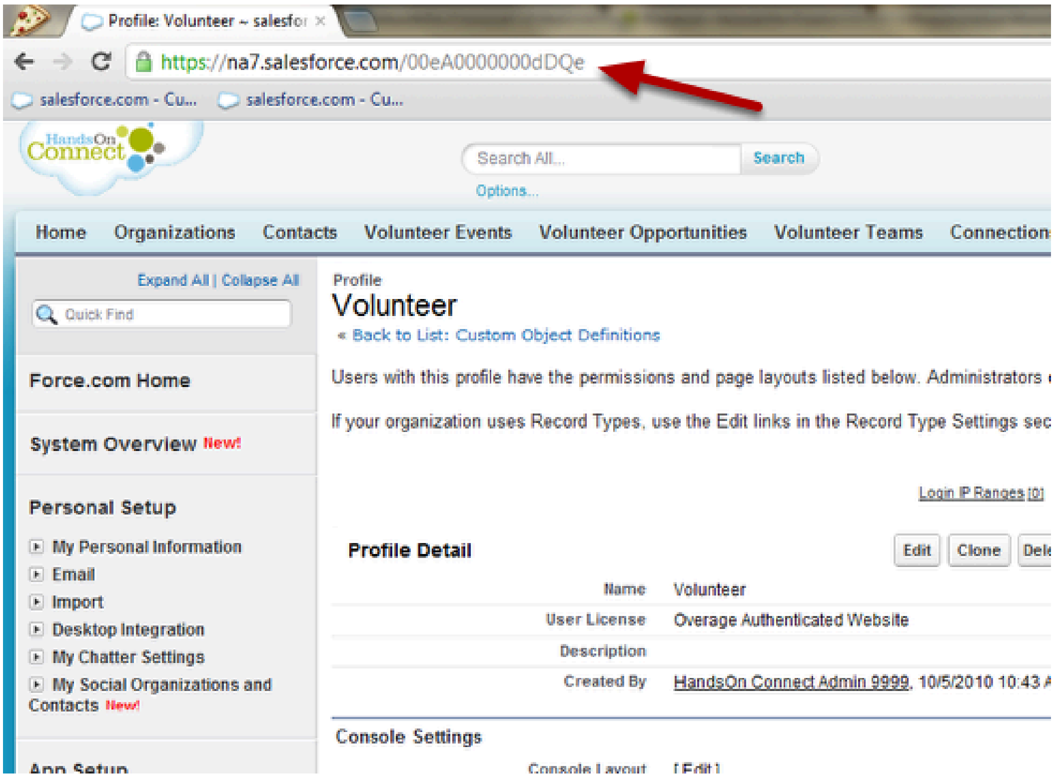
Create a new report using the "Contacts & Organizations" type. Your report needs to have 4 fields, First Name, Last Name, Email, and Contact ID. Set a filter to exclude record where the Email field is empty, along with any other filters you need to narrow down your list of users. After you have run your 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.

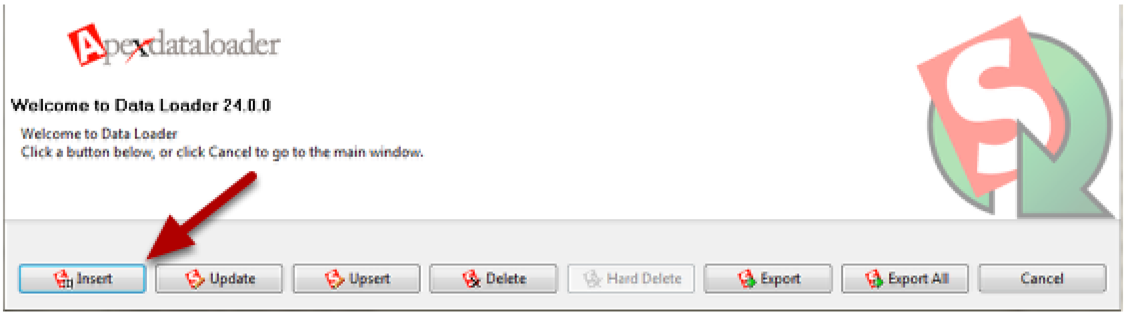
Filling in the Profile ID column



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

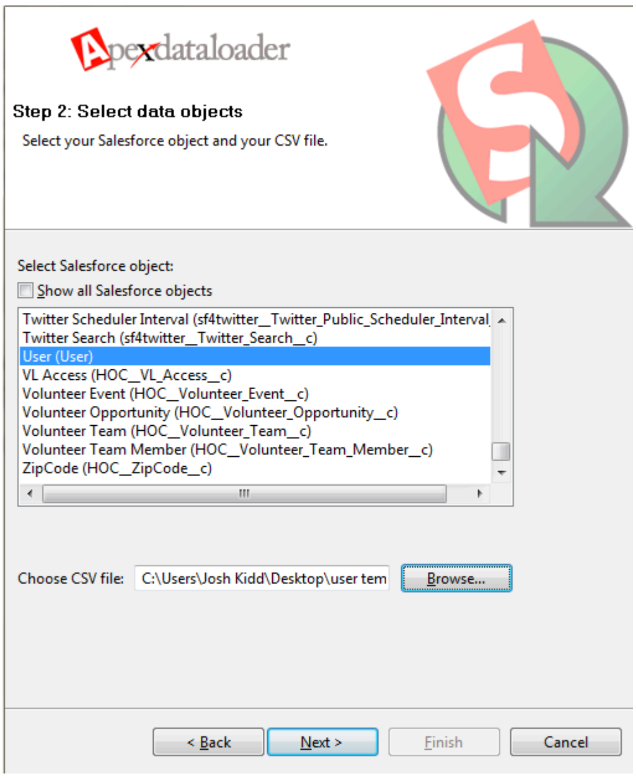
Partner Staff, Volunteer, or Volunteer Leader. The Profile ID is the last 15 characters of the URL address, up to but not including the slash. Copy that string into the Profile ID column on your spreadsheet and save it as a CSV file.

Open the Apex Data Loader and Insert Records



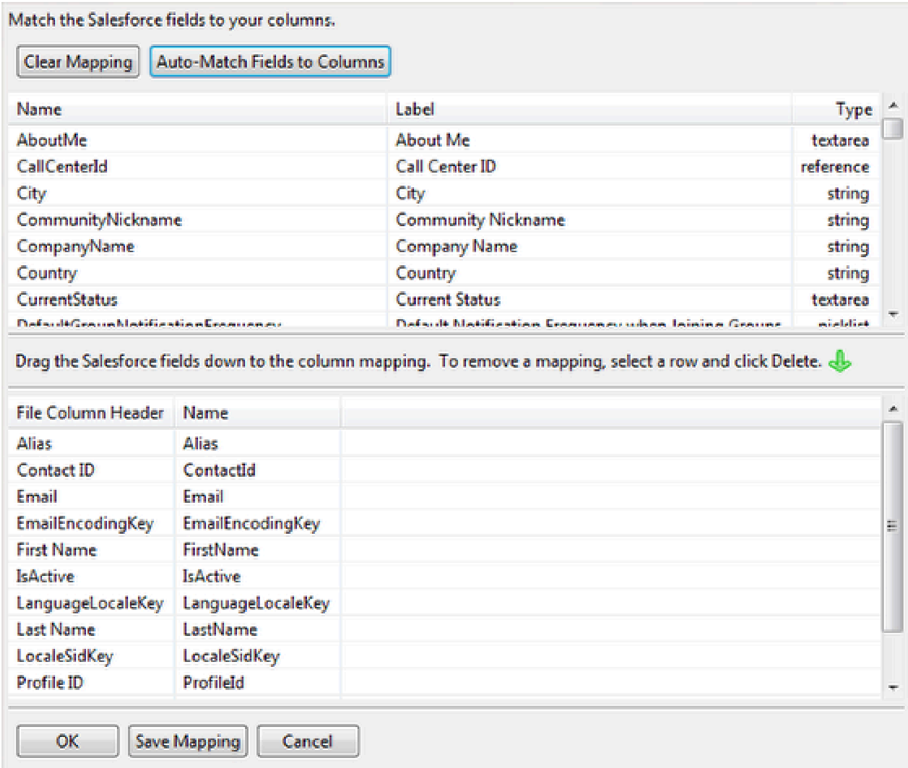
Open your Apex Data Loader and press the insert button. For the first Data Loader operation, you will be asked to log in. Enter your Salesforce Username and Password. REMEMBER TO APPEND YOUR SECURITY TOKEN TO THE END OF THE PASSWORD. Click Login, then click Next.

Select the object and file



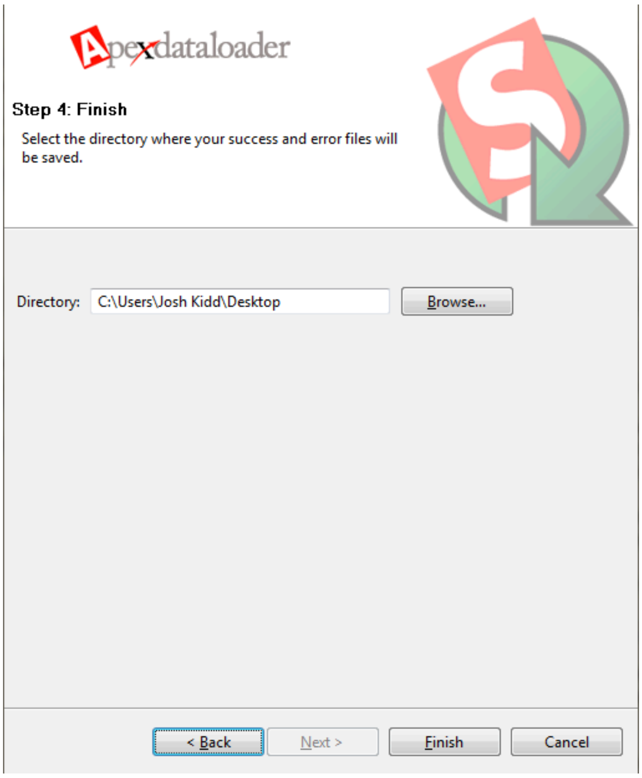
Select User in the Salesforce object list. Then click browse to find the file you just created. Then click Next.

Create the field mapping



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

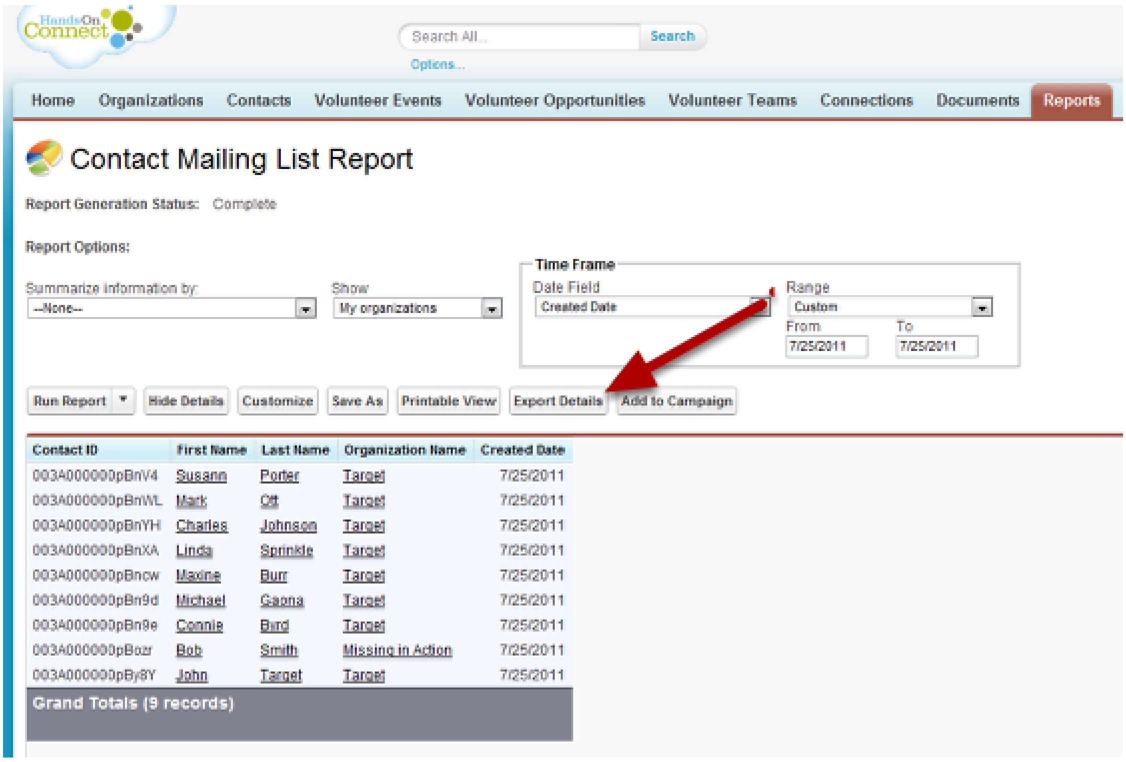


On the Finish screen, click Browse and find the directory where you want to store the success and error logs. Then click Finish. Your users should then be loaded into HandsOn Connect.

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



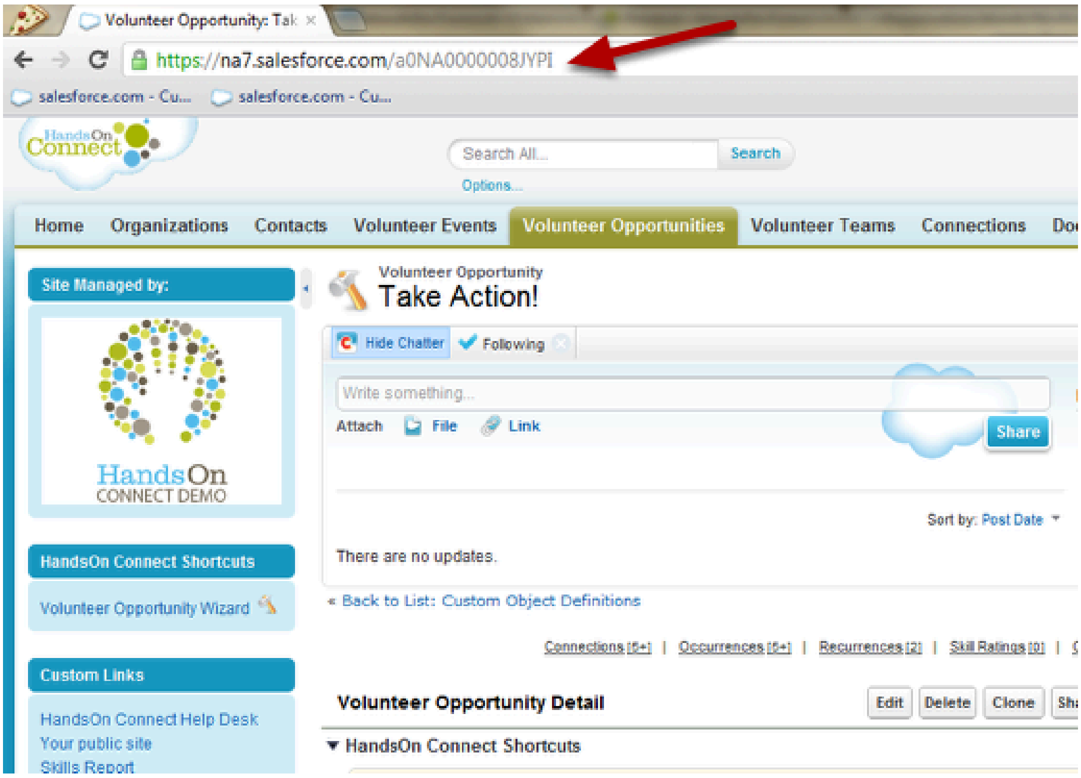
Create a report using the "Contacts & Organizations" type. Make sure that the report has the Contact ID field in it. Any other fields that you need to help you be sure you are getting the right Contacts can also be added. Set up any filters that you need to get only the Contacts that you need. If you 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

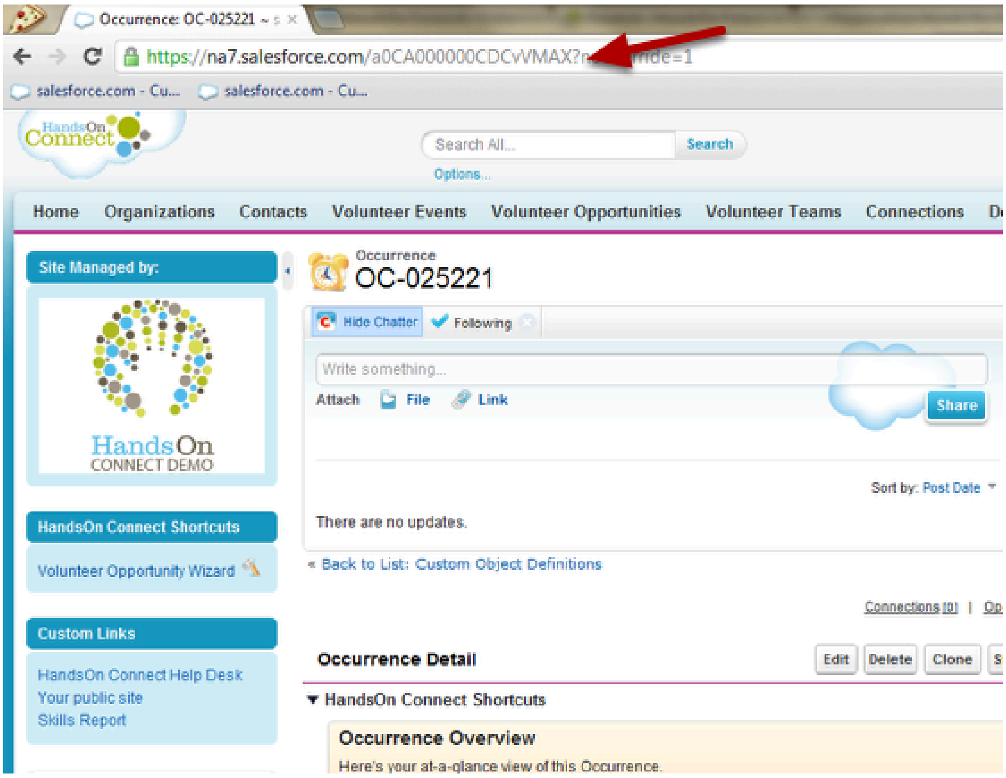
Create a new spreadsheet with the following 6 columns: Contact, Volunteer Opportunity, Occurrence, Status, Attendance Status, and Role. Copy Contact ID from the exported report into the Contact column. Status should be Confirmed. Attendance Status should be whatever is appropriate, most likely Please Verify. Role should be either Volunteer or Volunteer Leader.

Adding the Volunteer Opportunity ID to the sheet.



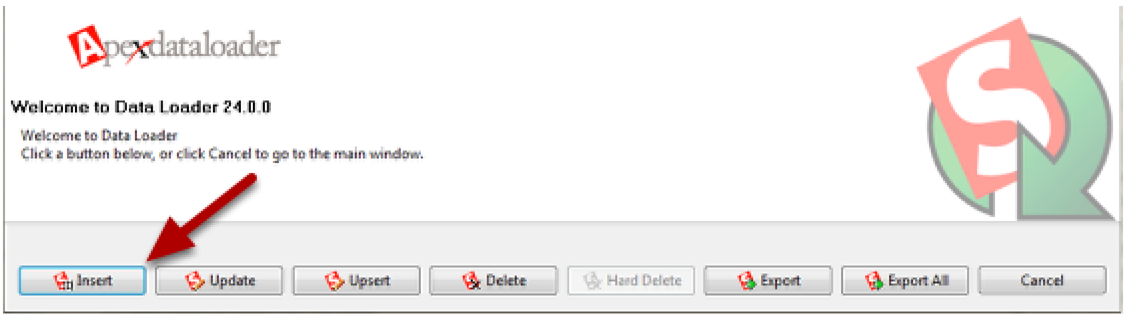
Log into Salesforce and go to the Volunteer Opportunity you wish to connect the Contacts to. The Volunteer Opportunity ID is the last 15 characters of the URL address, up to but not including the slash. Copy that string into the Volunteer Opportunity column on your spreadsheet.

Getting the Occurrence ID in the sheet.



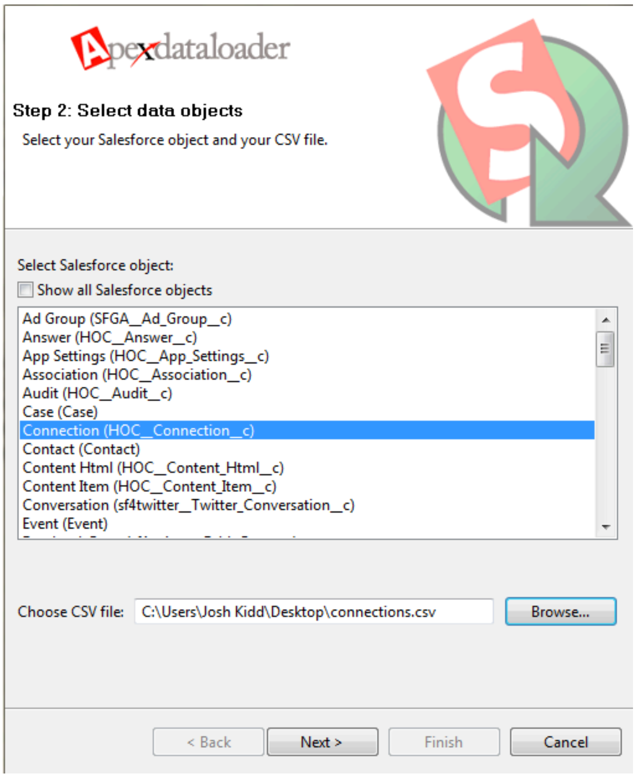
Now go to the Occurrence of that Volunteer Opportunity that you wish to connect the Contacts to. In this case, the Occurrence ID is the 18 character string between the slash and the question mark. Copy that string and paste it into your spreadsheet. Then, save your spreadsheet in CSV format.

Open the Apex Data Loader and Insert Records



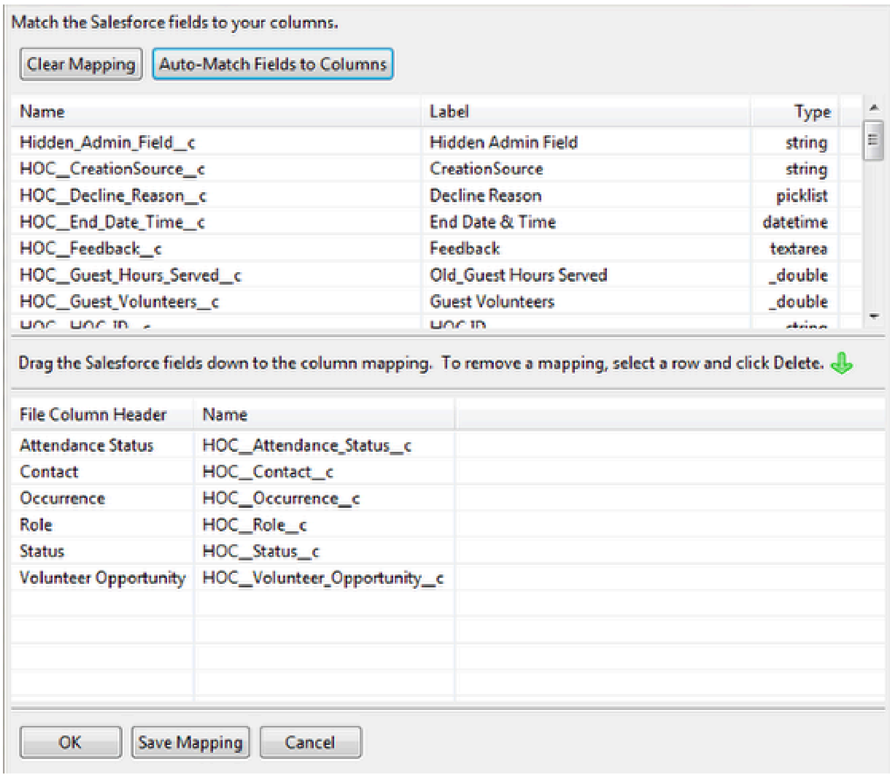
Open your Apex Data Loader and press the insert button. For the first Data Loader operation, you will be asked to log in. Enter your Salesforce Username and Password. REMEMBER TO APPEND YOUR SECURITY TOKEN TO THE END OF THE PASSWORD. Click Login, then click Next.

Select the object and file



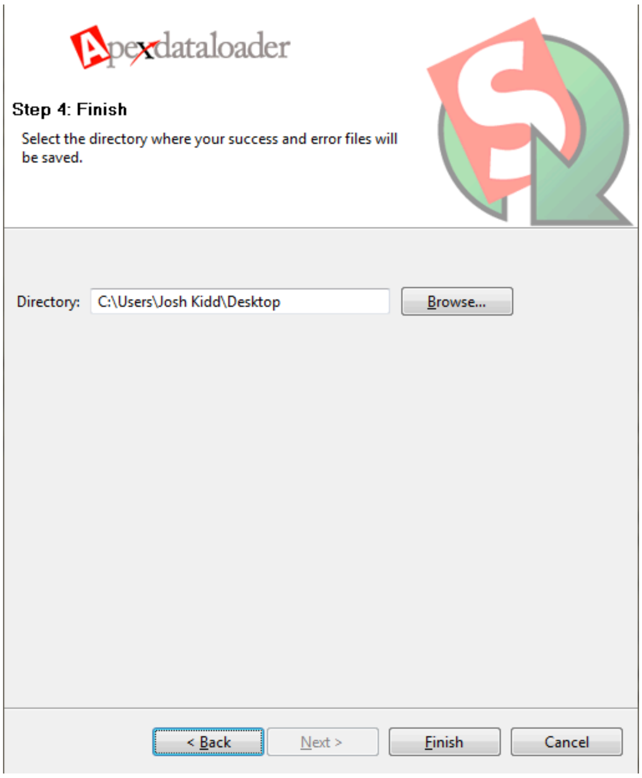
Select Connection in the Salesforce object list. Then click browse to find the file you just created. Then click Next.

Create the field mapping



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



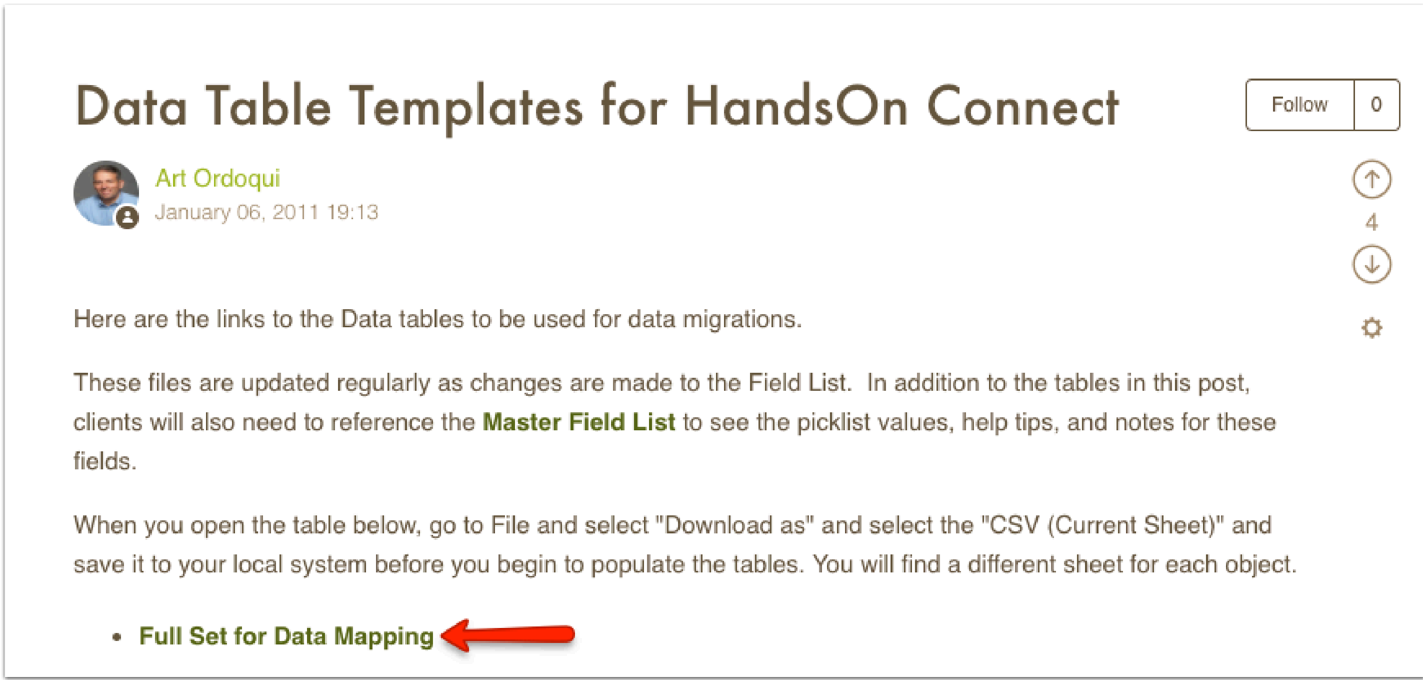
On the Finish screen, click Browse and find the directory where you want to store the success and error logs. Then click Finish. Your Connections should then be loaded into HandsOn Connect.

Importing Volunteer Opportunities via the Data Loader

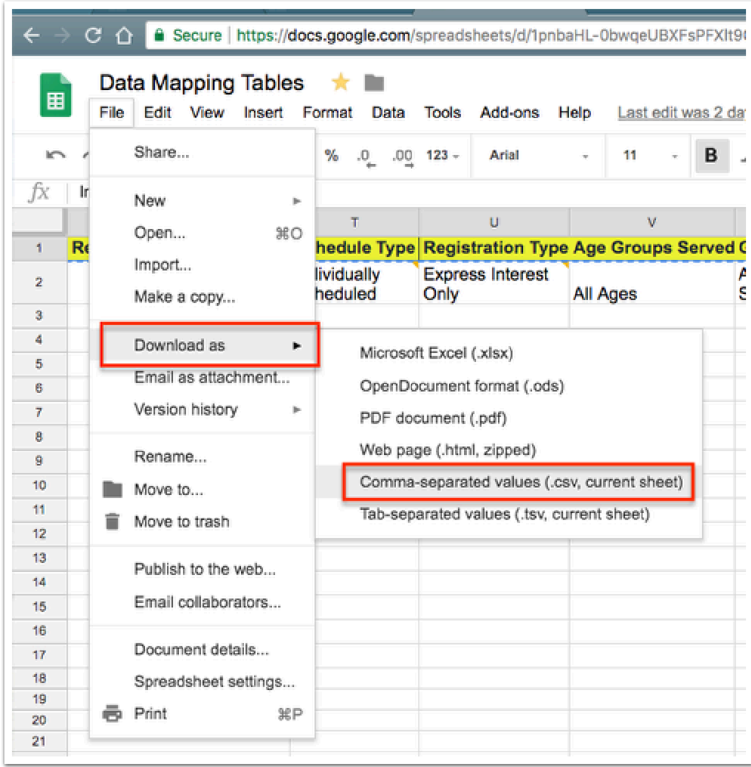
Do you have many Volunteer Opportunities that you would like to get into your HOC system but you don't want to use the Volunteer Opportunity Wizard? The Data Loader (or similar tool) would be a great choice for getting that done. This is considered advanced data management.

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.]



Go to the Volunteer Opportunity tab and click on "Download As" and choose csv



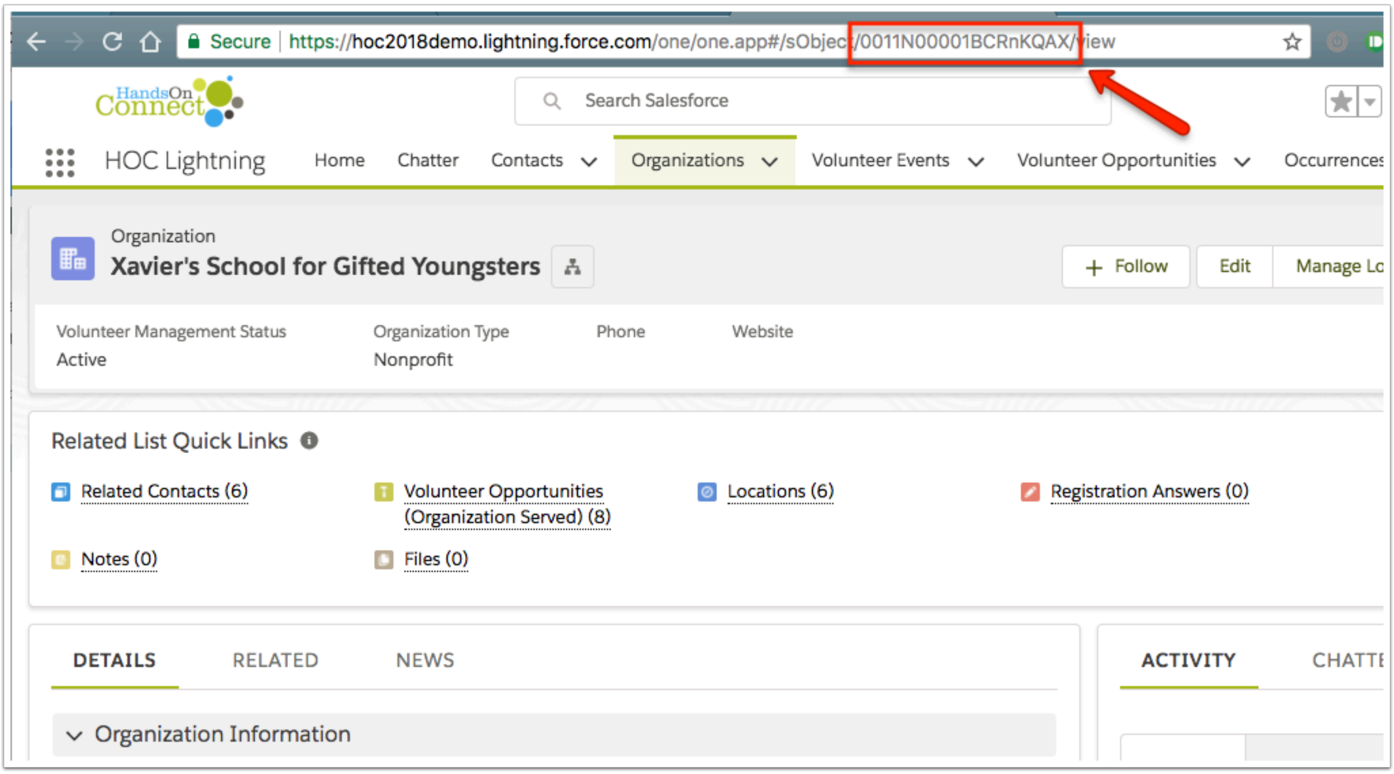
Keep in mind: Individually Scheduled Volunteer Opportunities can only have ONE occurrence which is auto-created during this process, so for any Date & Time Specific Volunteer Opportunities, you **MUST also create occurrences**. If you need to import Occurrences as part of this process, please visit this 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

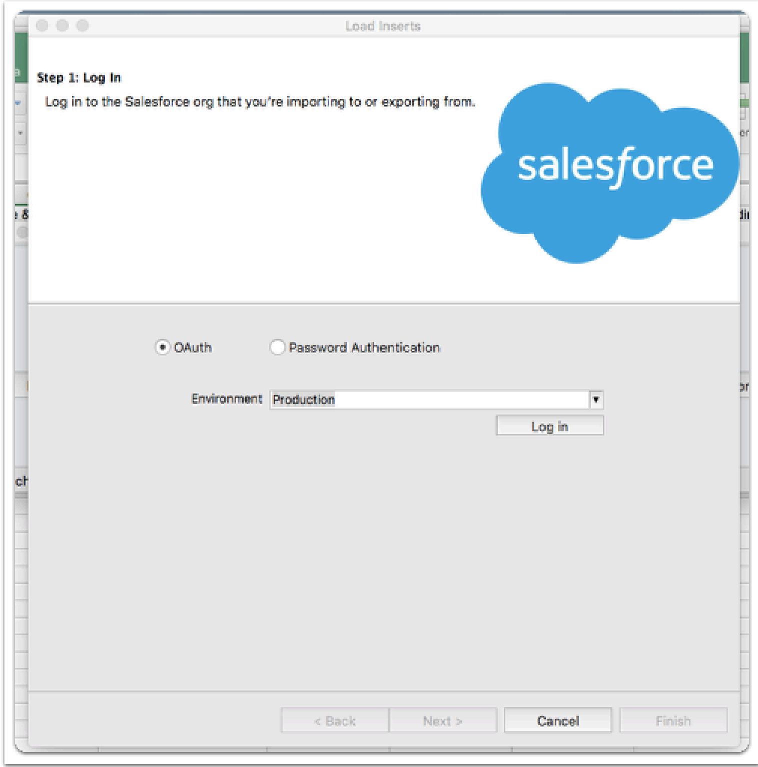
Here is an example of the fields necessary to import into the system. Save this file as a CSV, and you will then begin your import.

		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 S	Primary Impa	Registration (	Registration T	Schedule Type	Status	Type
2	CRo6QAH	0031N00001JPrcUQAT	0011N00001BCRo6QAH	All Ages	a0B1N00000Geeh8UAB	01/01/1999	09/01/2018	All Genders Served	50	18	18	1	Families	Other	1	Express Inter	Date & Time Specific	Active	Project
3	CRo6QAH	0031N00001JPrcUQAT	0011N00001BCRnKQAX	All Ages	a0B1N00000Geeh8UAB	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	CRo6QAH	0031N00001JPrcUQAT	0011N00001BCRo6QAH	All Ages	a0B1N00000Geeh8UAB	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	CRo6QAH	0031N00001JPrcUQAT	0011N00001BCRo6QAH	All Ages	a0B1N00000Geeh8UAB	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	CRo6QAH	0031N00001JPrcUQAT	0011N00001BCRnKQAX	All Ages	a0B1N00000Geeh8UAB	01/01/1999	09/01/2018	All Genders Served	50	18	18	1	Families	Animals	1	Express Inter	Date & Time Specific	Active	Project

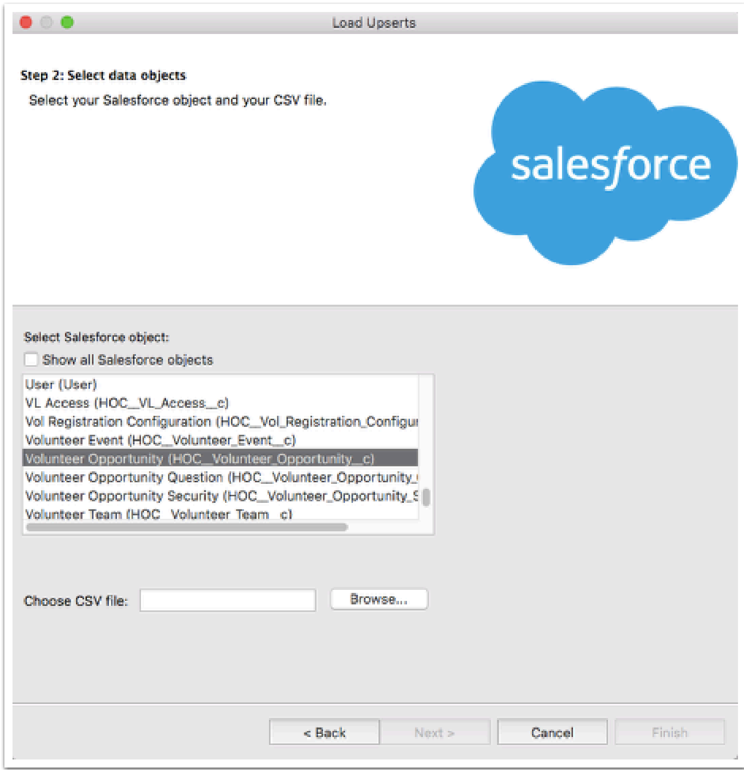
H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
Organization Served	Age Groups Served	Default Location	Start Date	End Date	Genders Served	Maximum At	Minimum Ag	Minimum Ag	Minimum At	Populations S	Primary Impa	Registration (	Registration T	Schedule Type	Status	Type
0011N00001BCRo6QAH	All Ages	a0B1N00000Geeh8UAB	01/01/1999	09/01/2018	All Genders Served	50	18	18	1	Families	Other	1	Express Inter	Date & Time Specific	Active	Project
0011N00001BCRnKQAX	All Ages	a0B1N00000Geeh8UAB	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	a0B1N00000Geeh8UAB	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	a0B1N00000Geeh8UAB	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).



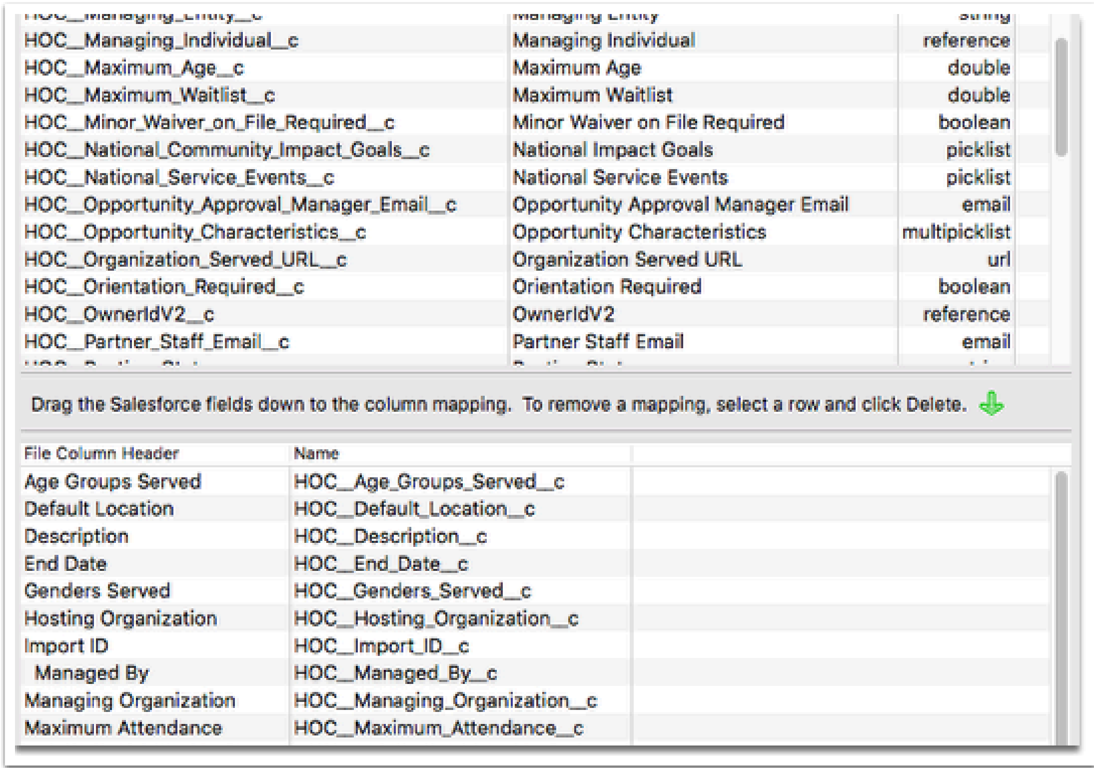
Link to the Volunteer Opportunity Object

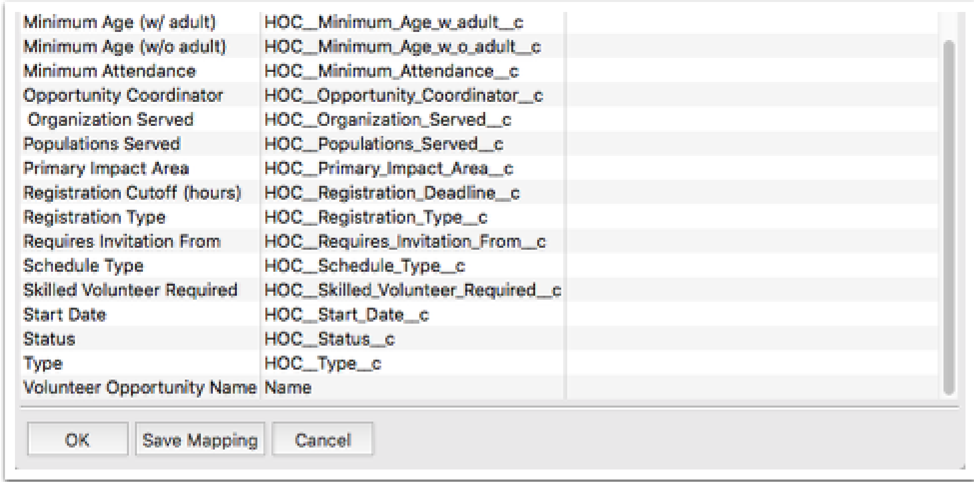


If at a later time you decide you want to update these (or any) Volunteer Opportunities and you chose Upsert rather than Insert, you would then be prompted to match on an ID field. Since you're including the import ID, you would then select HOC__Volunteer_Opportunity__c. You must have the Import ID in 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."





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

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.

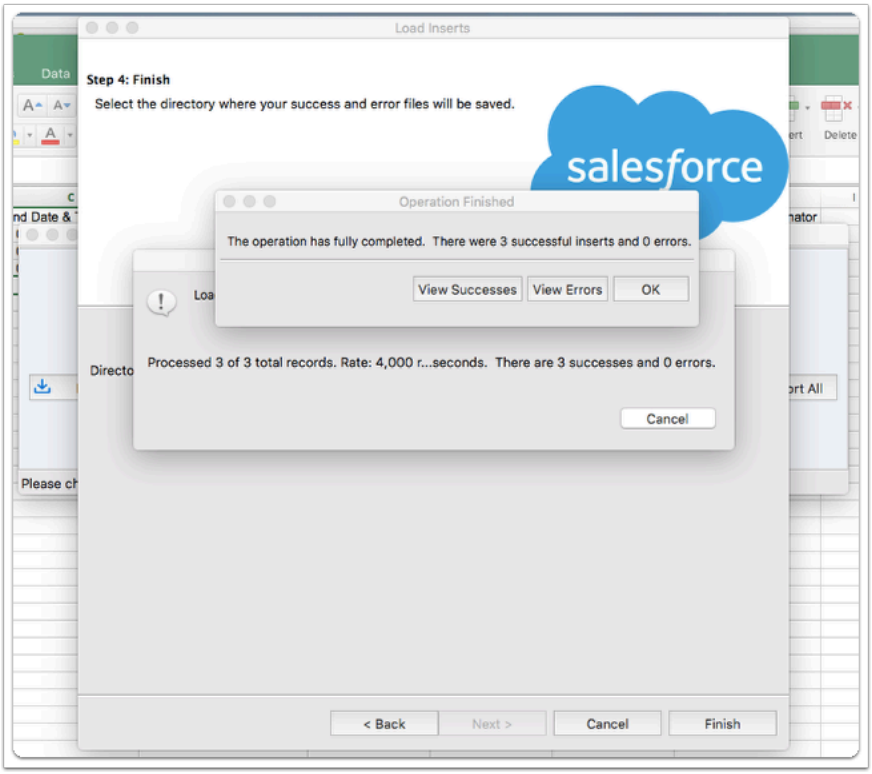
Select where to save the success/failure files

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

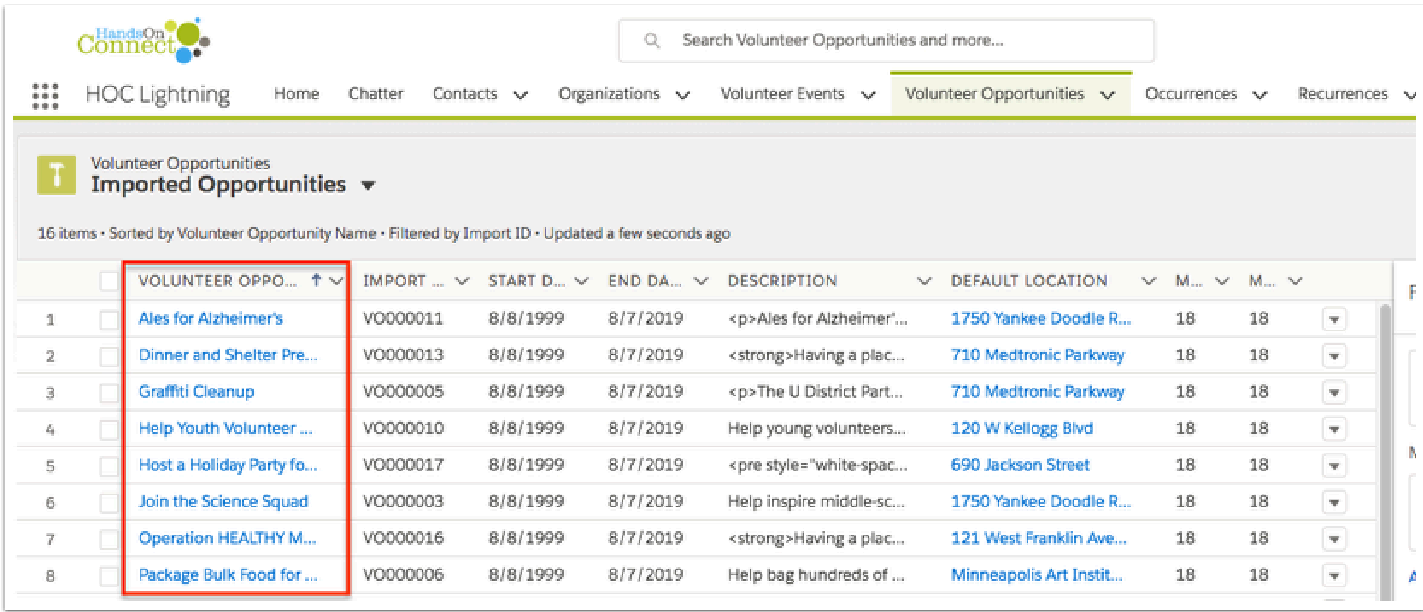
Click on "Finish" to begin the import. You will be prompted with a warning stating what you will be doing ("You have chosen to insert new records.") and you must confirm that this is what you wanted to do. As the data is being imported, you will see the successes and failures for the import.

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

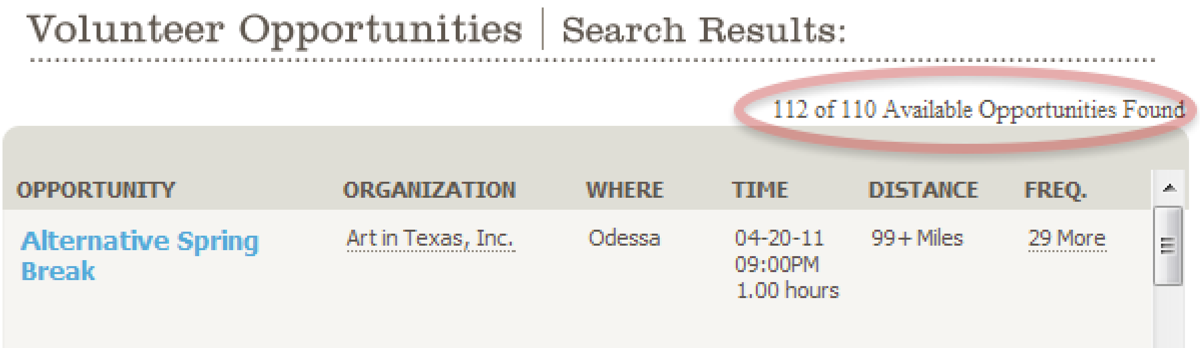
Verify that the data was properly imported into your Salesforce Instance and that for any Individually Scheduled Volunteer Opportunity that was created, an Occurrence was also created.



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

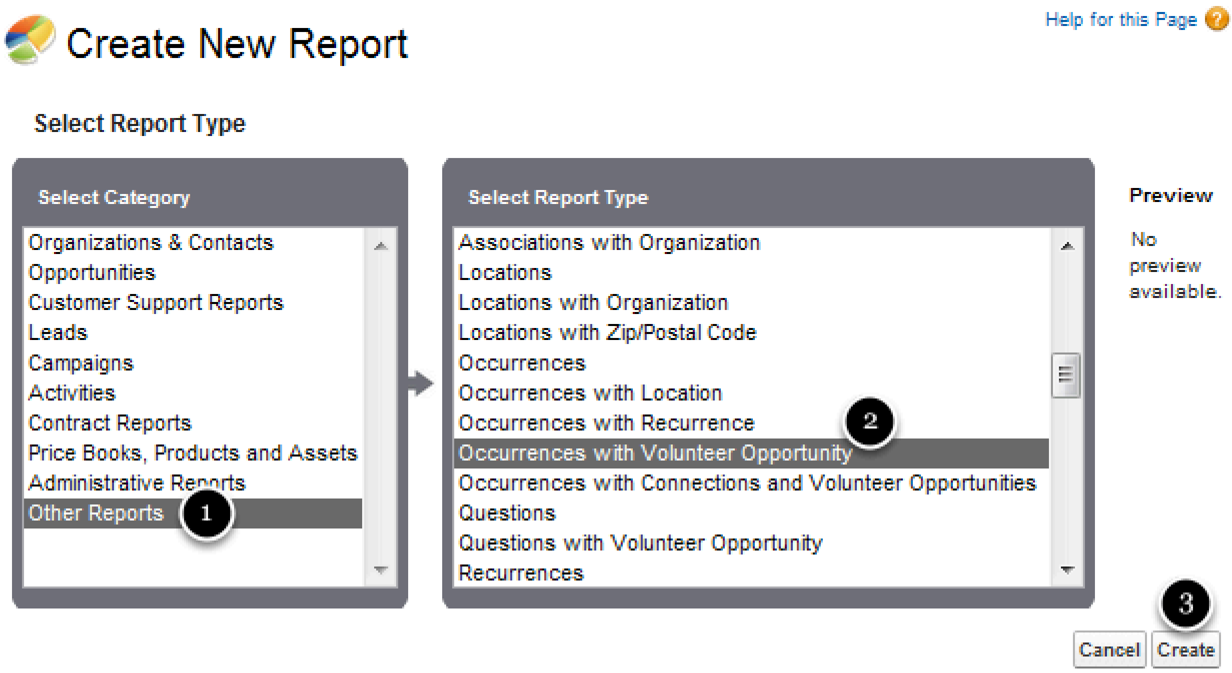


Building the Data Table

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



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

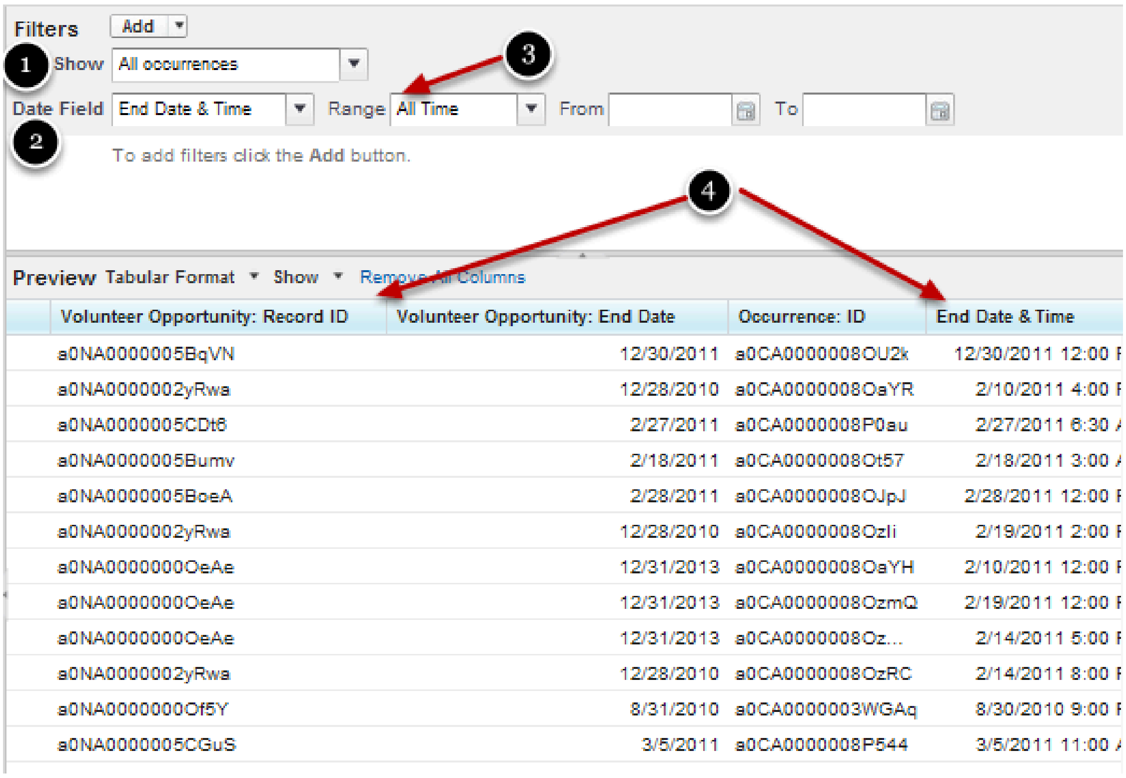
Volunteer Opportunity: Record ID

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-######).



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.

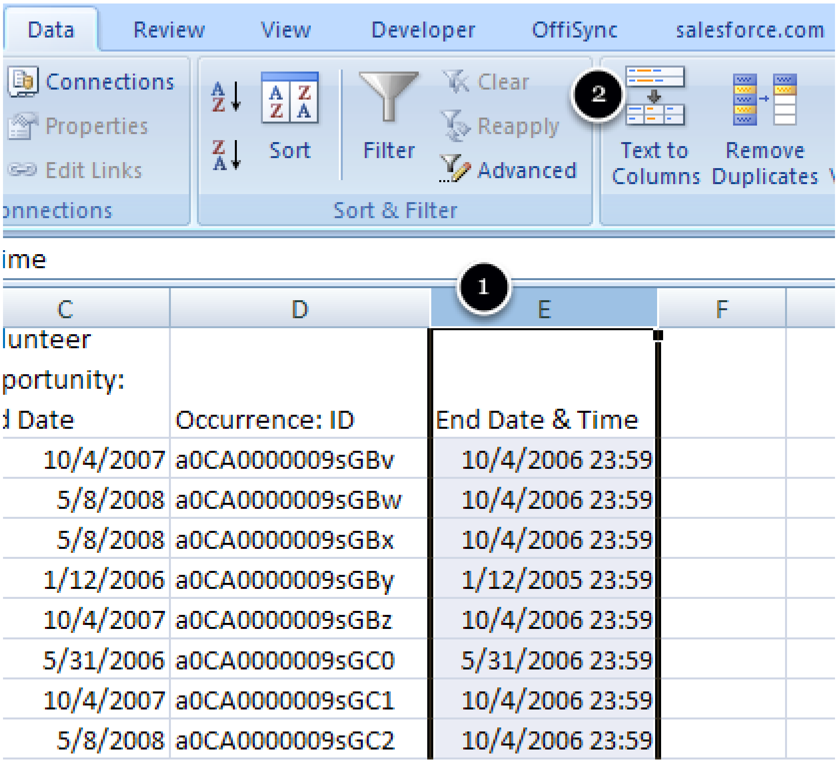
What we need to do is compare the end date of the occurrence with the end date of the volunteer opportunity, but the end date of the occurrence is in date & Time format so we first need to separate the date and time into different cells. This is done by:

1) Highlighting the column where the end date & time for the occurrence is listed. **<u>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.</u>**

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.

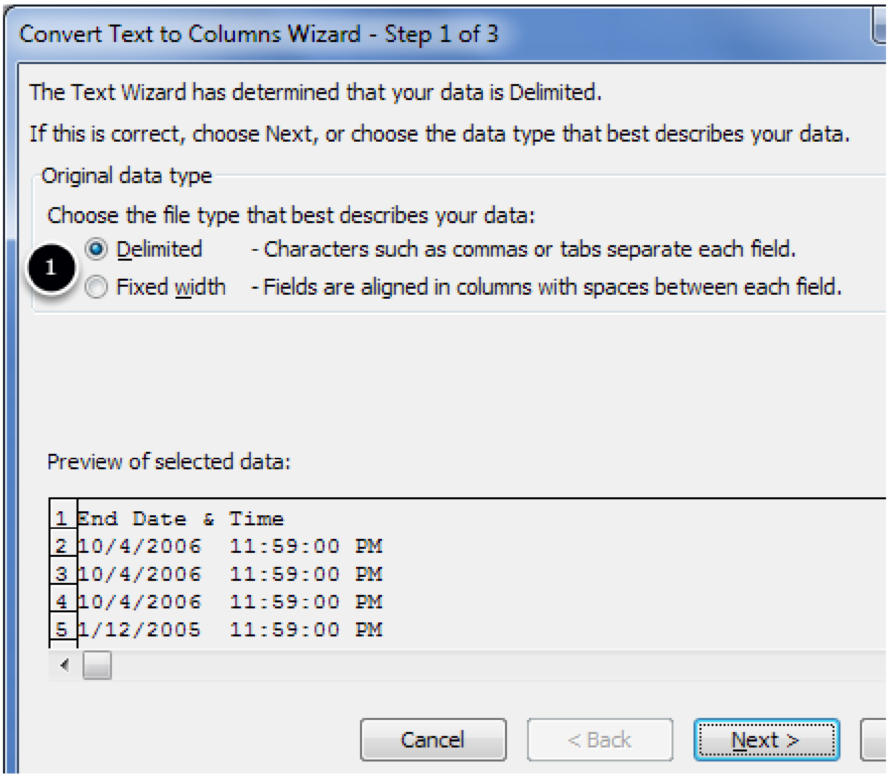


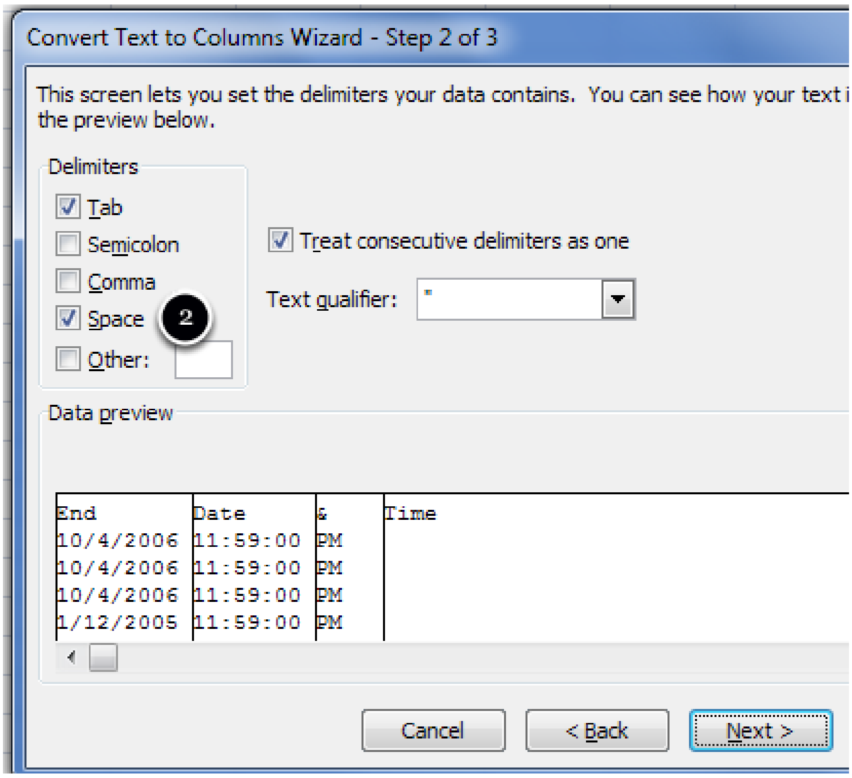
In the Text to Column Wizard that opens, choose the following:

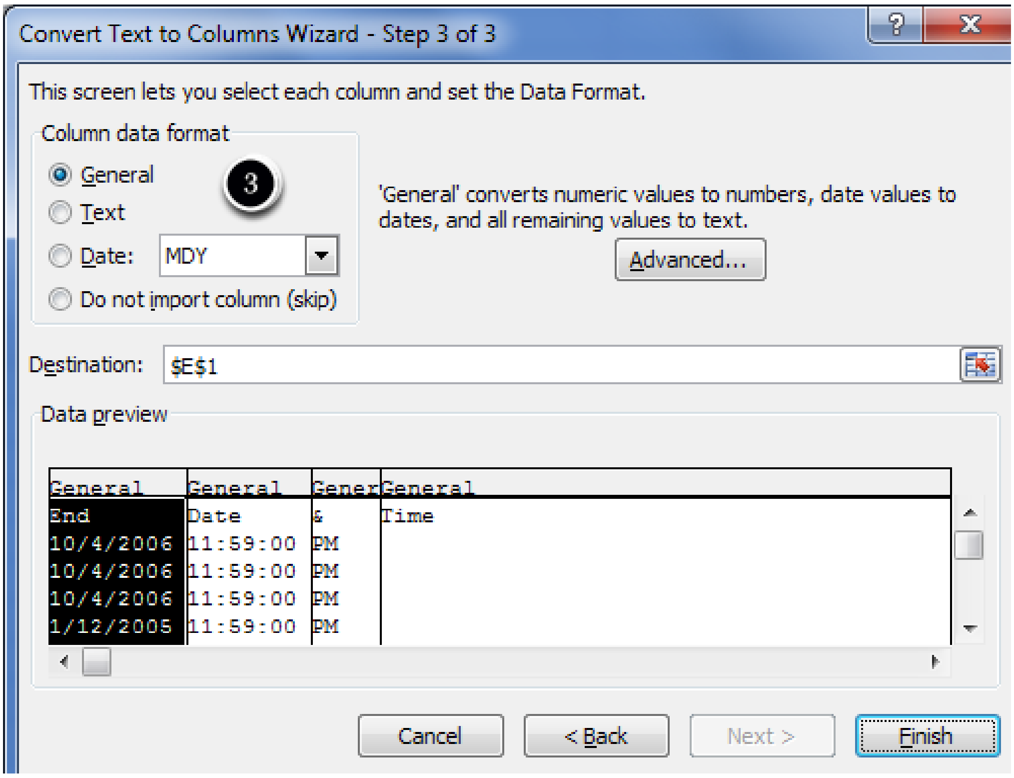
Step 1- Select Delimited. Then click next

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.

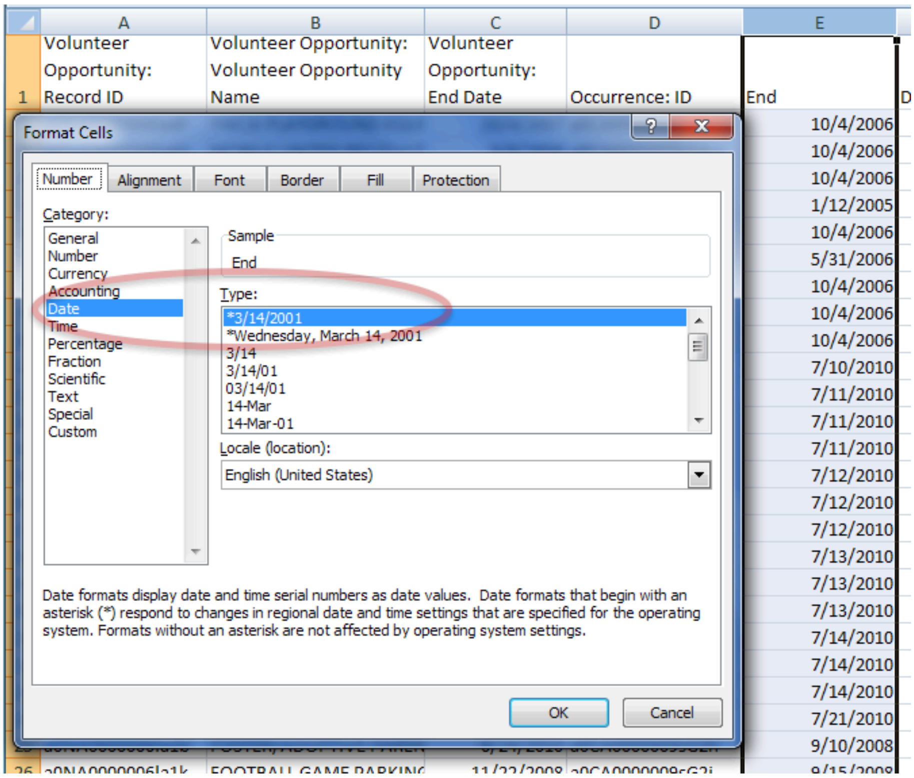

Convert Text to Columns Wizard - Step 1 of 3
The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.
Original data type
Choose the file type that best describes your data:
Delimited - Characters such as commas or tabs separate each field.
1
Fixed width - Fields are aligned in columns with spaces between each field.
Preview of selected data:
1 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 i
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).

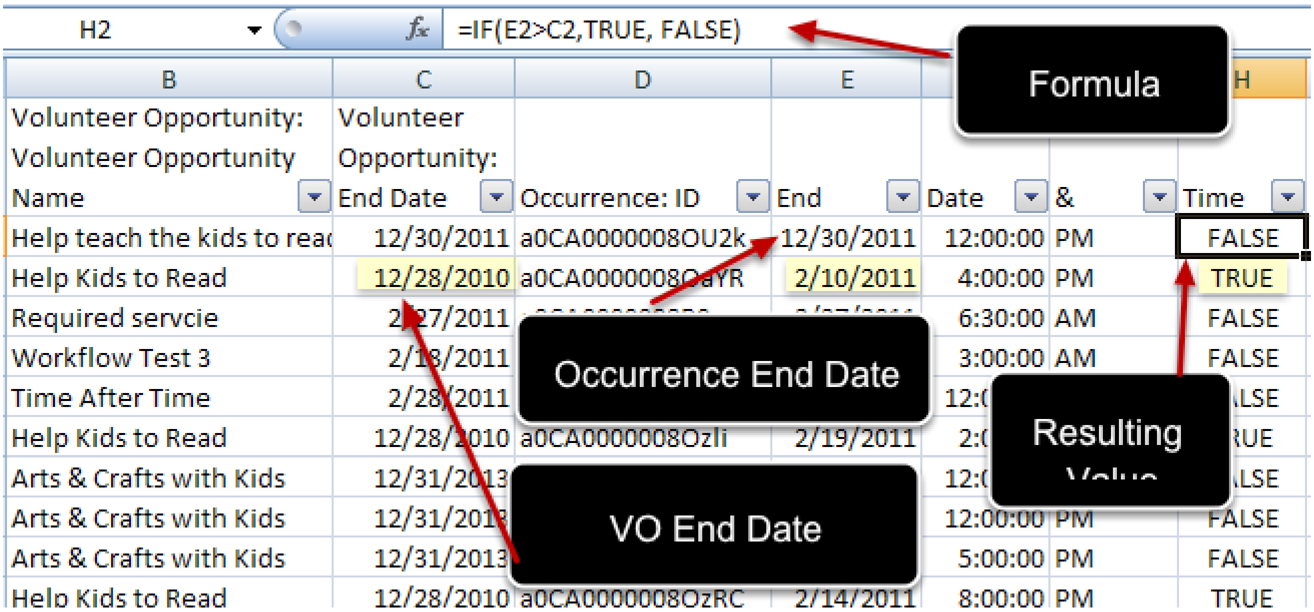
Where E2- represents the cell that has the occurrence end date, and

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.



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)

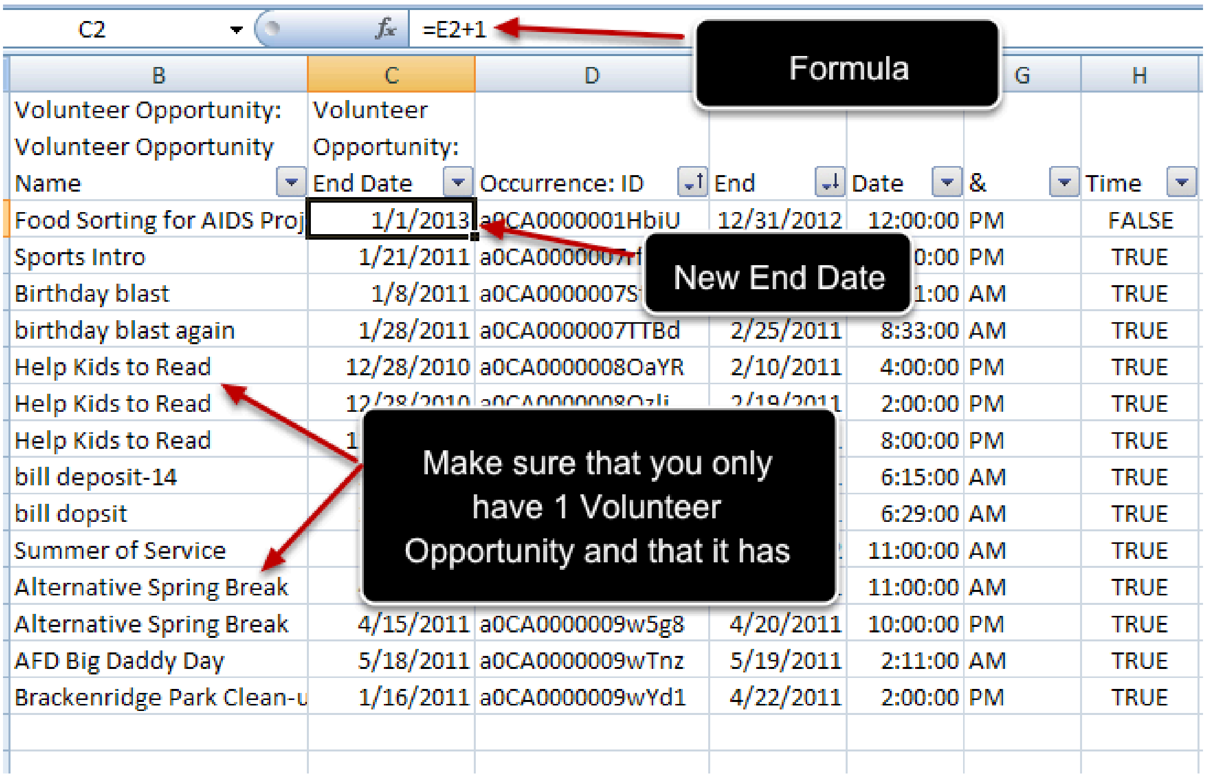
c) When using the Import Custom Objects in Salesforce, the only two columns that you need to map are:

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
=E2+1
Formula
B
C
D
G
H
Volunteer Opportunity: Volunteer Opportunity Name
Volunteer Opportunity: 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 TRUE
Birthday blast 1/8/2011 TRUE
birthday blast again 1/28/2011 a0CA0000007TTBd 2/25/2011 8:33:00 AM TRUE
Help Kids to Read 12/28/2010 a0CA0000008OaYR 2/10/2011 4:00:00 PM TRUE
Help Kids to Read 2:00:00 PM TRUE
Help Kids to Read 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 a0CA0000009w5g8 4/20/2011 10:00:00 PM TRUE
AFD Big Daddy Day 5/18/2011 a0CA0000009wTnz 5/19/2011 2:11:00 AM TRUE
Brackenridge Park Clean-u 1/16/2011 a0CA0000009wYd1 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