System Administrator -- Intro to Customizing HOC to meet your business practices

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Getting ready to Customize HandsOn Connect

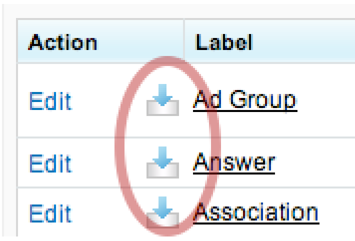
The HandsOn Connect app is a Managed Package

With Great Power comes Great Responsibility.

Before customizing anything in HandsOn Connect - be sure to read this entire chapter!

You can customize HandsOn Connect, in many, many ways -- but some things cannot be edited, because they are part of the Managed Package.

Items that are part of the HandsOn Connect Package are marked with an icon



Anything that has the icon shown above is part of the HandsOn Connect Application.

This means you do not have full control over editing this item. You can make some changes, but some are not permitted. That's because the **Hard-Coding** of HandsOn Connect requires certain things to never be changed. Otherwise, HandsOn Connect updates would not be possible.

There are also things you are able to change - but shouldn't!

To keep the product as flexible as possible - System Administrators have the ability to edit fields that SHOULDN'T be changed.

Doing so could prevent HandsOn Connect's hard-coding from functioning properly.

To determine what fields you should and shouldn't alter -- you can refer to the HandsOn Connect Field List.

HandsOn Connect Complete Field List - always consult before editing fields!

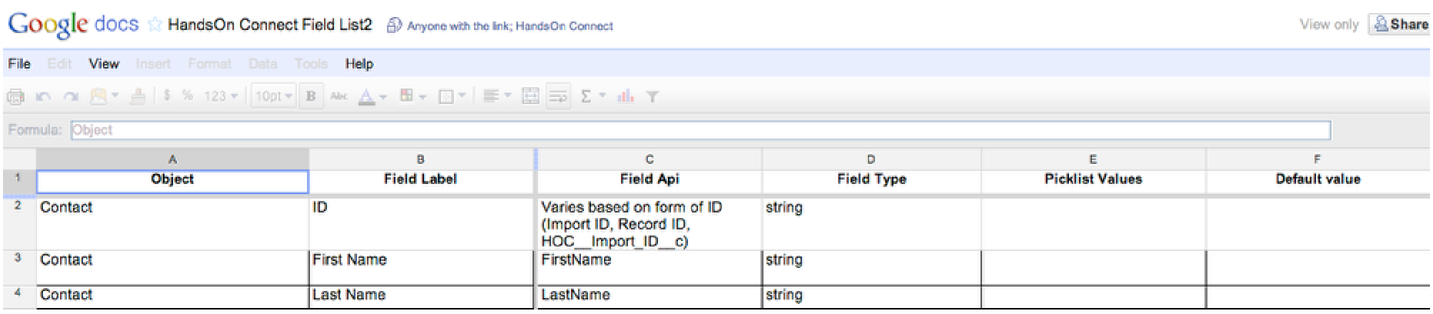
In this training and manual we are going to show the various ways in which HandsOn Connect can be customized and edited.

As a system administrator, you have full access to the majority of the fields in HandsOn Connect, including the ability to edit picklists.

However -- even though it is technically possible to edit all the picklists -- for the most part -- you **should not** edit most of them. Many of the picklists in HandsOn Connect are critical to the execution of the code that renders the public site, or part of national integration. The ability of your instance of HandsOn Connect to automatically provide the data needed for the HandsOn Network's Annual Affiliate Report depends on picklists of data being collected nationwide to remain consistent.

[Click here to access the Hands On Connect Field List]

How do I know which fields can and can't be edited? How do I know which picklists can and can't be changed?



Object	Field Label	Field Api	Field Type	Picklist Values	Default value
Contact	ID	Varies based on form of ID (Import ID, Record ID, HOC__Import_ID__c)	string		
Contact	First Name	FirstName	string		
Contact	Last Name	LastName	string		

The **Hands On Connect Field List** shared in Google Docs is a guide to the fields that are part of the HandsOn Connect product. Before making any changes to an existing field you should consult this list to determine whether or not the field is one that can be safely edited.

Here's the information that's contained in the field list:

Row A: Object --

Row B: The **field label** as seen on the site in the object record

Row C: Field API - the actual unique name of the field record (while Field Labels may get updated over time - the Field API will remain what was originally defined when the field was created.

Row D: Field Type

Row E: The Picklist Values that shipped with the product

Row F: The default value if it is specified

Google docs ☆ HandsOn Connect Field List2 Anyone with the link; HandsOn Connect View only Share

File Edit View Insert Format Data Tools Help

Formula: 800

	A	B	G	H	I	J	
1	Object	Field Label	Should be Populated?	Notes	Help/Definition	Editable	
34	Contact	Employment Status	RECOMMENDED		Identifies the employment status as identified by the contact.	Yes	N
35	Contact	Ethnicity/Race	RECOMMENDED		Identifies the ethnicity/race as identified by the contact. This list can not be altered.	DO NOT EDIT	Y
36	Contact	Gender	RECOMMENDED		Identifies the gender as identified by the contact. This list can not be altered.	DO NOT EDIT	Y
37	Contact	Heard About Us?	RECOMMENDED		Allows volunteers to indicate how they heard about your volunteer center	Yes	N
38	Contact	Home City	RECOMMENDED		Contains the related information for the Contact's mailing address.		N

Row G: Should be Populated? Indicates if data in this field is required or recommended.

Row H: Notes

Row I: Help/Definition

Row J: Editable. This is the most important column to consult before modifying a picklist. If the field is marked Do Not Edit it's critical that you do not change the picklist values from the defaults shown. If you alter these -- you run the risk of the product not working properly. Do not rename, delete, or add values to this field.

If the row says "YES" then you can safely add, change or delete picklist values in this field.

	A	B	J	K	L	M
1	Object	Field Label	Editable	Intergration	HOT	800
28	Contact	Court Ordered Volunteer		No	No	No
29	Contact	Created Date		No	No	No
30	Contact	Date Minor Waiver Received		No	No	No
31	Contact	Disabled Person		Yes	Yes	Yes

Row K - Integration - explains if the field is part of national integration for search, civic transcripts, skilled volunteerism, or national metrics and reporting.

Row L - HOT - Indicates whether the field existed in HandsOn Technology and was imported from HOT users

Row M - 800 - indicates whether the field existed in 1-800-volunteer and was imported from 1800 users.

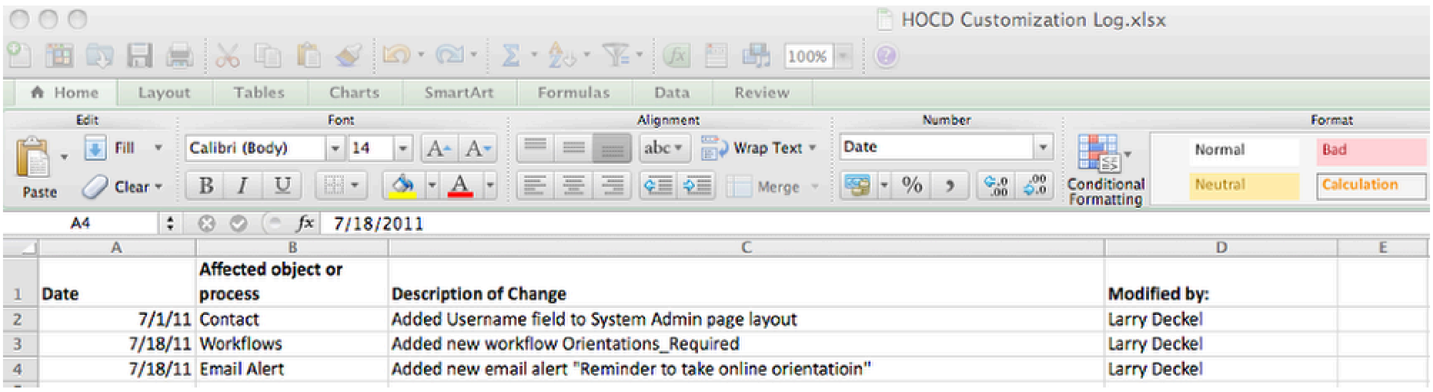
Note: This list is the original list of HOC fields. A number of fields have been added to the HOC managed package since this list was originally created.   If you have questions about a field in an object that you do NOT find in the field list -- open a support ticket and inquire about the field.   Whenever we get an inquiry about a field that is not on the list - we update the field list to include it for future reference.

Also: If a field is marked "Do not Edit" and you DO wish to edit it - open a support ticket. There are some situations in which a field can be safely edited and we will advise you on the circumstances.

Best Practice: Keep a record of all changes you make to HandsOn Connect and Saleforce

Because of turnover in nonprofit organizations - its quite possible that the System Administrator who first customizes HandsOn Connect will move on and a new System Administrator will take their place. If problems or confusion result with HandsOn Connect in the future -- it can be very difficult to diagnose the cause once HandsOn Connect has been modified from its original configuration..

Create a spreadsheet or other document as a logbook of what was changed and by whom.



Date	Affected object or process	Description of Change	Modified by:
7/1/11	Contact	Added Username field to System Admin page layout	Larry Deckel
7/18/11	Workflows	Added new workflow Orientations_Required	Larry Deckel
7/18/11	Email Alert	Added new email alert "Reminder to take online orientatioin"	Larry Deckel

We highly recommend documenting any and all changes you make to HandsOn Connect and Salesforce in ONE central spreadsheet, that anyone will be able to access.

One way to do this is to create an excel document on your computer, and then add it as a File stored in Salesforce in a folder your entire staff has access to.

Each week (or at least once a month) -- replace the existing document in SF with the latest copy from your local computer.

This way -- a complete history of changes will remain accessible in your instance of Salesforce.

This document will prove invaluable in troubleshooting issues, working with tech support to resolve issues, and adapting your customizations to take advantage of future releases of HandsOn Connect.

Use Chatter as a way to track changes

Another option that makes it easy to track your administrative changes, is to use Chatter to record any changes you make to the system. You can associate it with a Chatter Topic or Tag -- and then anyone with access to chatter could search and see any notes you've made on what was changed and when!

Standard Objects and Custom Objects

Salesforce comes with a number of **Standard Objects** that are part of of Salesforce. However Salesforce also allows you to create **Custom Objects**

The HandsOn Connect Application adds a large number of custom objects to Salesforce.

Standard Objects

The two, standard Salesforce Objects used in HandsOn Connect are:

Accounts (which in HandOn Connect and for users of Non Profit Success Pack) is generally renamed to **Organizations**

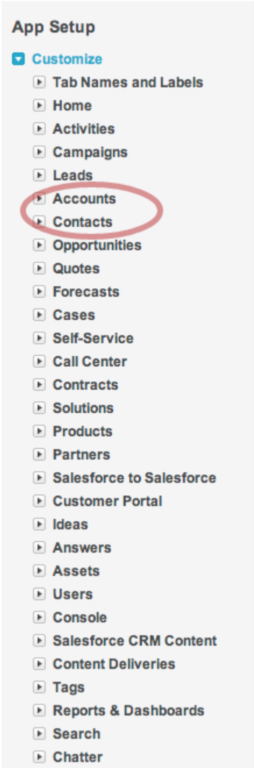
Contacts

Custom Objects

The HandsOn Connect package has dozens of Custom Objects that track data related to volunteer management and the HOC application. A few of the most important ones are:

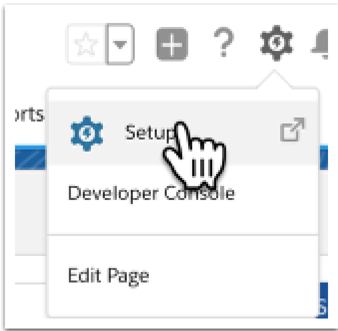
- Volunteer Events
- Volunteer Opportunities
- Occurrences
- Recurrences
- Connections
- Volunteer Teams
- Volunteer Team Members
- Locations

There are plenty of others -- some which handle administrative chores - and others which are used for advanced features in HandsOn Connect



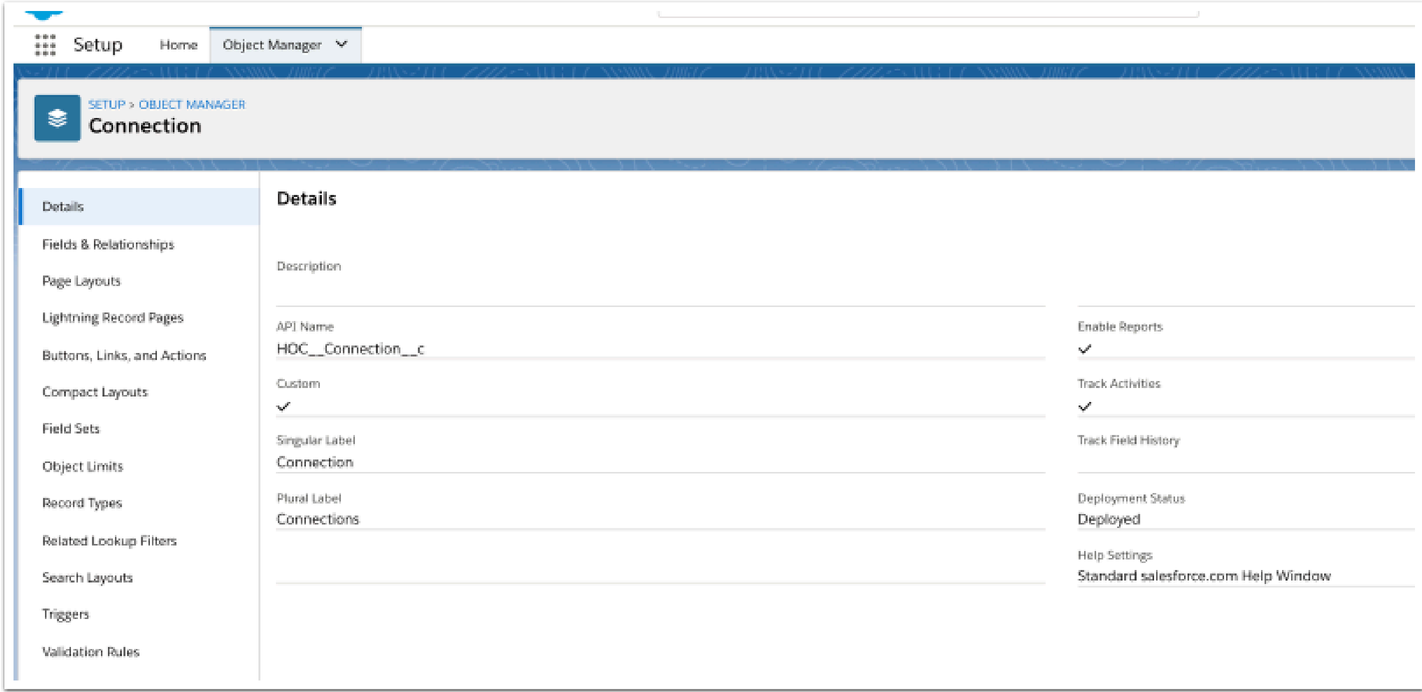
To Access Objects in Salesforce Lightning

Click on the Cog to access the setup menu, then click on Object Manager:



You'll then see a list of all the objects that are available in Salesforce and the HandsOn Connect Application, listed by Label and API name. You can use the quick find field in the upper right to quickly find an object by name.

Click on the name of the object to access the object details: (In this example, let's look at the Connection object:



The left menu in an object gives you access to all the components of the object:

- Fields and Relationships -- (a list of all standard and custom fields in the object. Go here if you want to add new fields or update existing picklist values, etc.)
- Page Layouts -- go here to edit page layouts, create new ones, and manage assignment of page layouts to profiles.
- Lightning Record Pages -- edit or create a lightning record page layout (all the components around and including the Page Layout)
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- and all the other characteristics related to that object....

Learn more about objects

Look for resources in Trailhead to learn more about the structure of objects.

A good place to start is in the module on [Data Modeling.](#)

Picklists

Editing Picklists

Picklists, the drop down menus that are used for some fields, can be modified by the system administrator.

Before modifying any picklist - first consult the Complete Field List available for HandsOn Connect to find out whether or not editing a picklist will break important HOC functionality.

See this article on using the HOC Field List and to access the field list before modifying a picklist:

HandsOn Network affiliates should also be careful not to edit picklist values in fields required by the HandsOn Network annual affiliate report, as it may mean you can't complete the required reporting. Consult HandsOn Network if you're unsure if certain HON values are required for annual reporting

General Guidelines about altering picklists:

- Don't alter any of the picklists that are used for functional operations in the system, such as **Status,** or the majority of the terms used to define Volunteer Opportunities.   (consult all fields list to be sure before making changes to these sorts of picklists)
- Anything marked as "local" can be added to or changed.
- Any new fields you create can be added to or changed.

A link to the complete list of fields can be found in the post **HandsOn Connect Field List.**

Look up the field you are considering changing the picklist on in this list.

If in Column J "Editable" it says "YES" then you can modify the picklist.

If in Column J it says "DO NOT EDIT" then do not edit the picklist. If may break the product or its national integration.

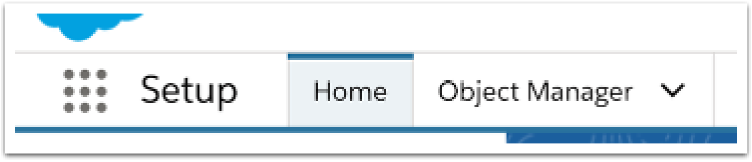
If a picklist is listed as editable, then you may go forward :-)

To change the picklist, you must go to the field record that is associated with the object you are trying to modify.

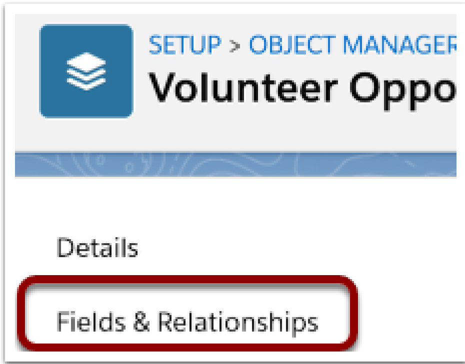
When in doubt about whether altering a picklist's values will impact normal HandsOn Connect operations - drop into a lab or open a support ticket. We'll be happy to tell you what is and isn't advisable.

To Get to any object in Salesforce Lightning

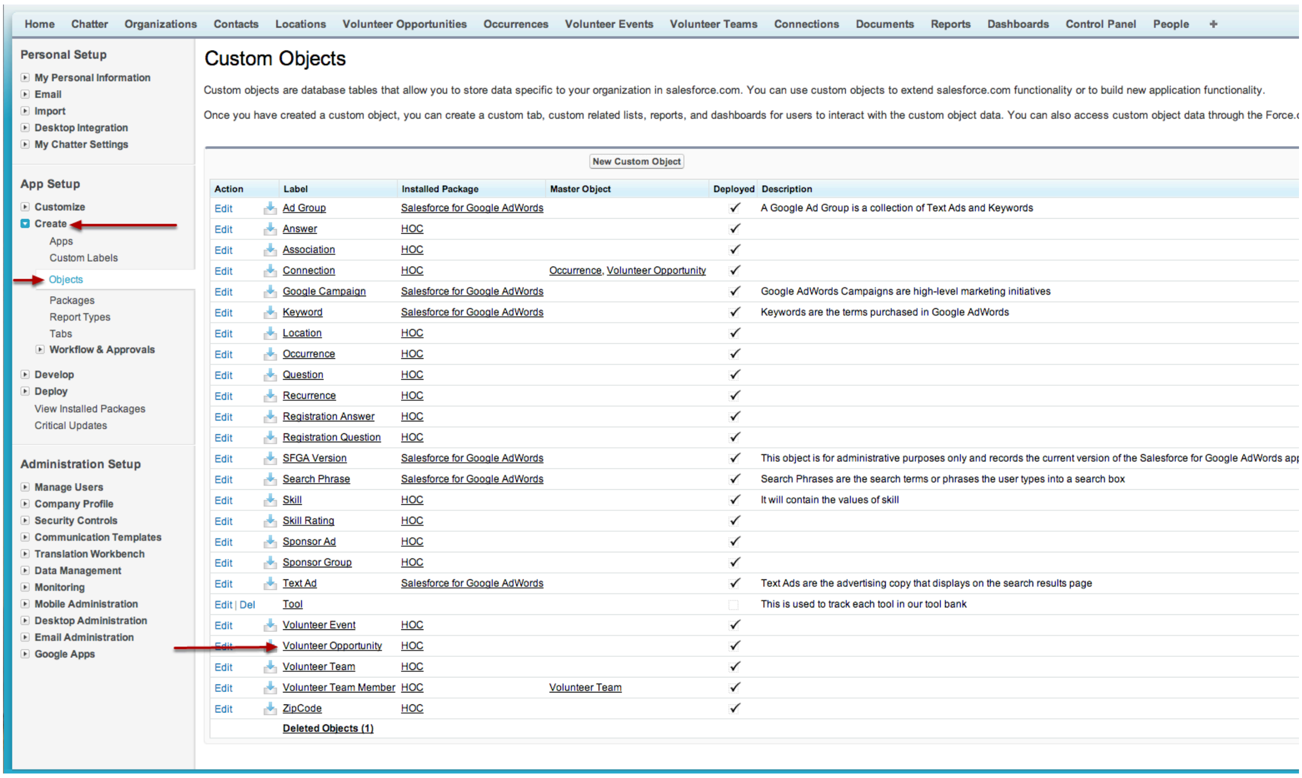
Go to Setup and click on the Object Manager tab. This will give you access to any object, whether standard or custom:



Select your object, and then choose "Fields & Relationships" to get the field list and find the field you are looking for.



In Salesforce Classic - Custom Salesforce Objects (like Volunteer Opportunities) are modified here:



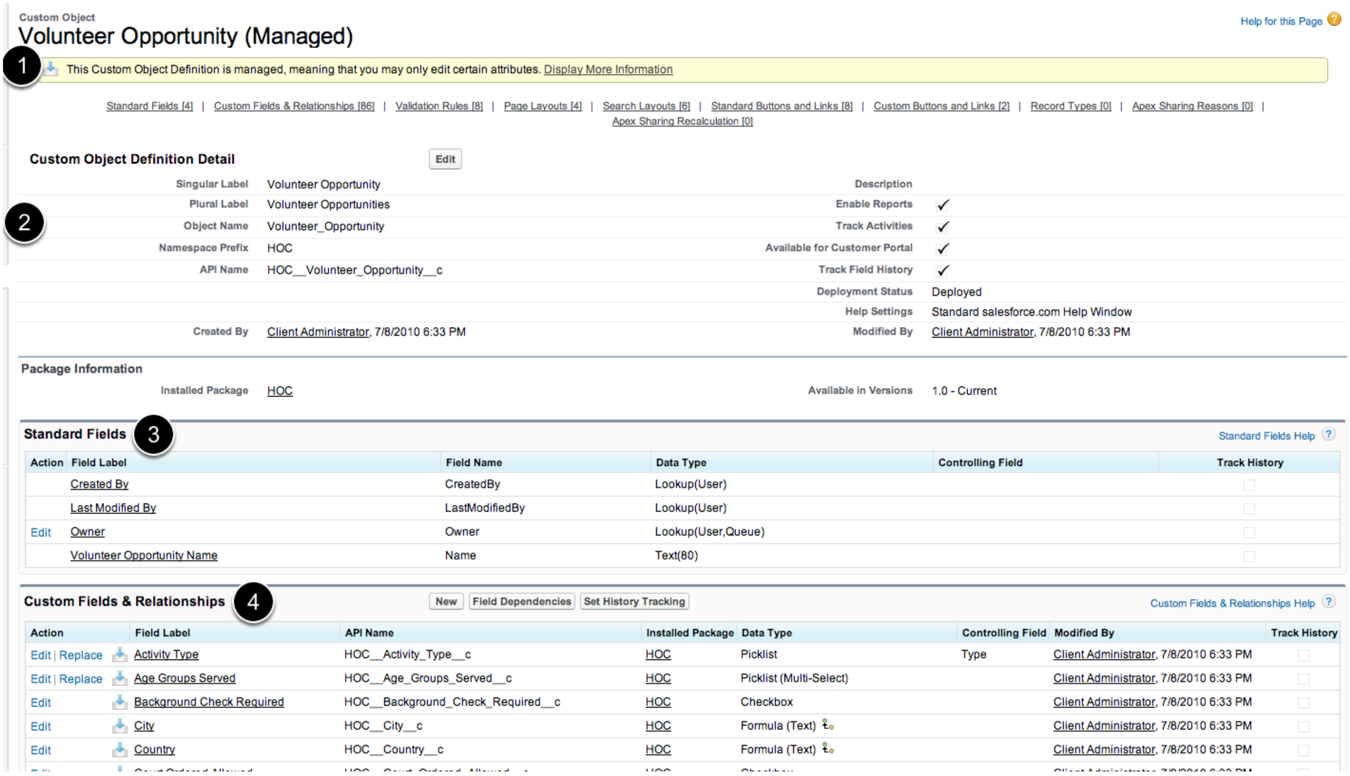
Go to **Setup / App Setup / Create / Objects.**

There you'll see a list of all the custom objects in Salesforce.

To examine and edit the fields for any of these objects, click on the hyperlink for the object name.

(*Note: Clicking on edit will allow you to edit some parameters of the custom object, but not the fields of the object itself*).

In this case we want to edit fields associated with Volunteer Opportunity so we click on the words "Volunteer Opportunity"



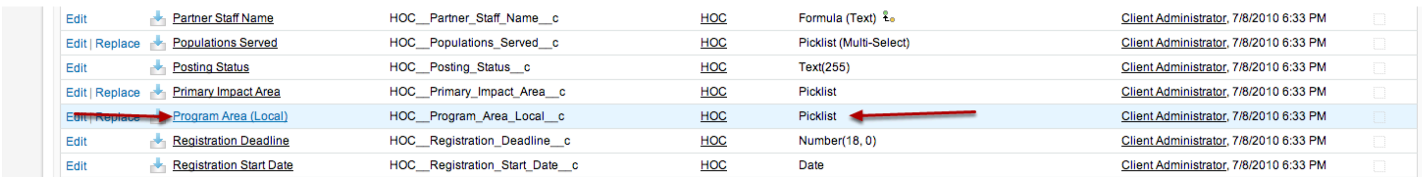
1. Objects that are part of the HandsOn Connect package are not FULLY editable. You can only edit characteristics that won't break the application for future upgrades.

2. Custom Object Definition Detail shows some of the characteristics about the object itself.

3. Standard Fields are fields that salesforce automatically adds to any custom object.

4. Most of the fields in a custom object are custom fields. So it's here we look for the field we are trying to modify:

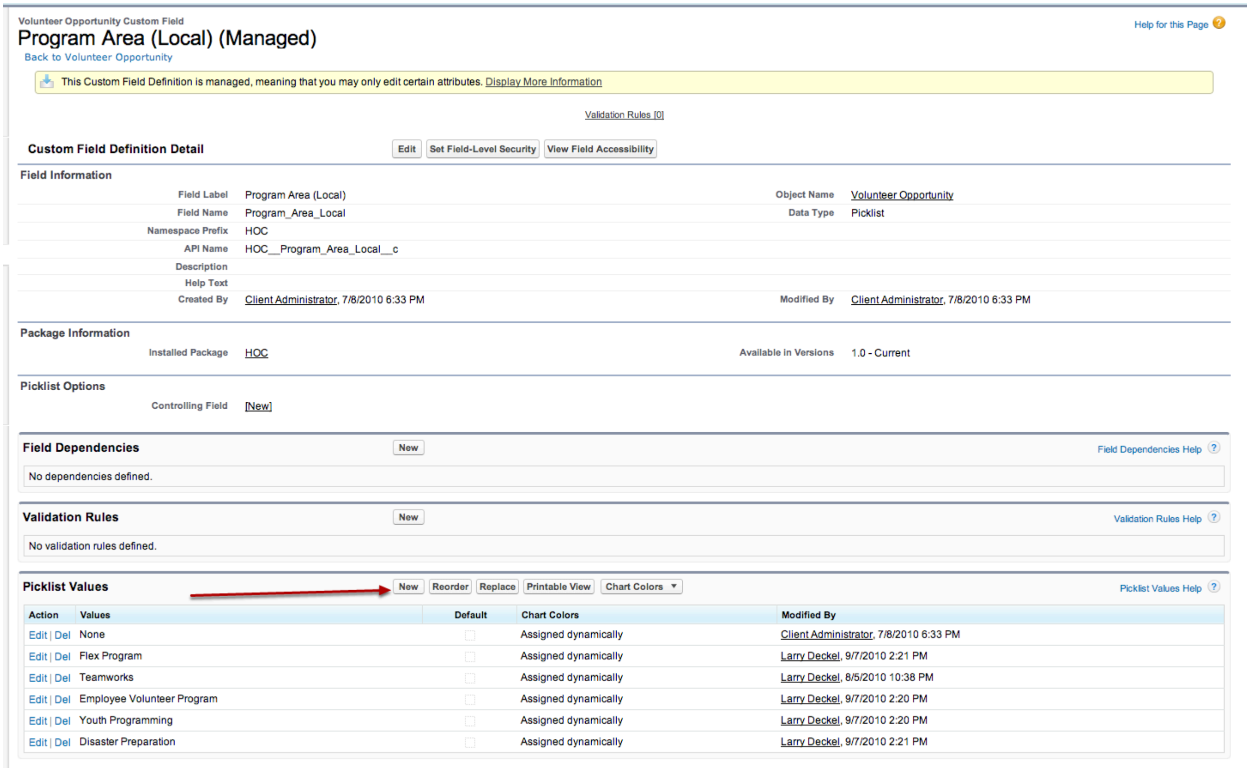
Let's modify the picklist for "Program Area (Local)"



We can see that Program Area (Local) is a picklist field. The field type is always indicated in the "Data Type" column.

Click on the hyperlink for the field to get to the field detail.

Field detail view

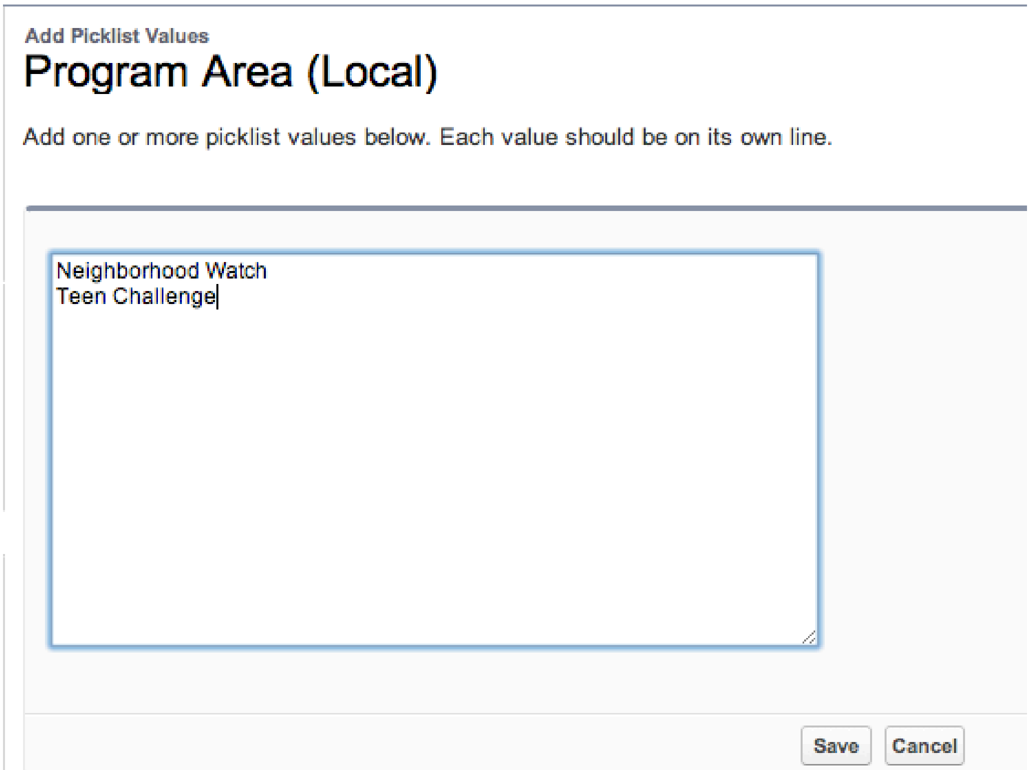


In Lightning, this section is simply called "Values" rather than "Picklist Values"

in the field detail screen, you'll see a list of the current picklist values.

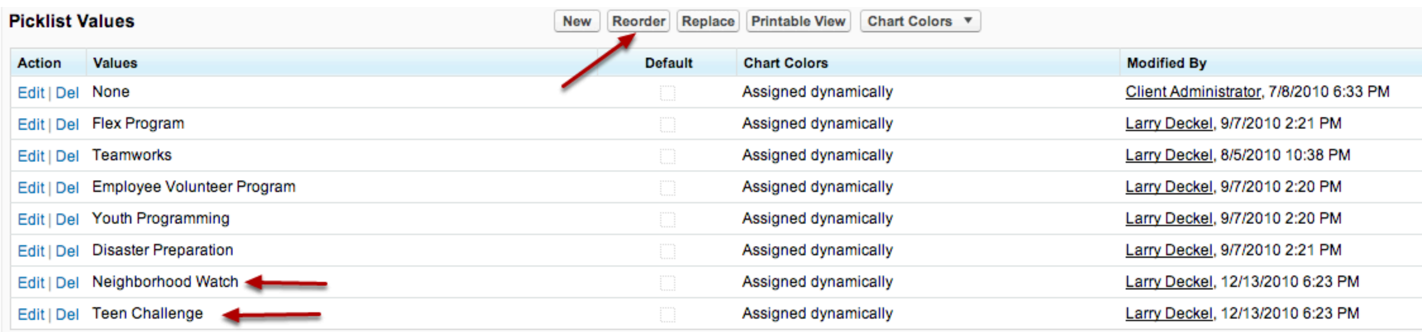
You can click on NEW to add new values, (or can reorder or replace the existing values). Let's click on NEW

Adding New Picklist Values



You can add as many additional values as you want to the list and when you click save they will be added to the possible picklist values. Click Save.

They new picklist values are added to the list

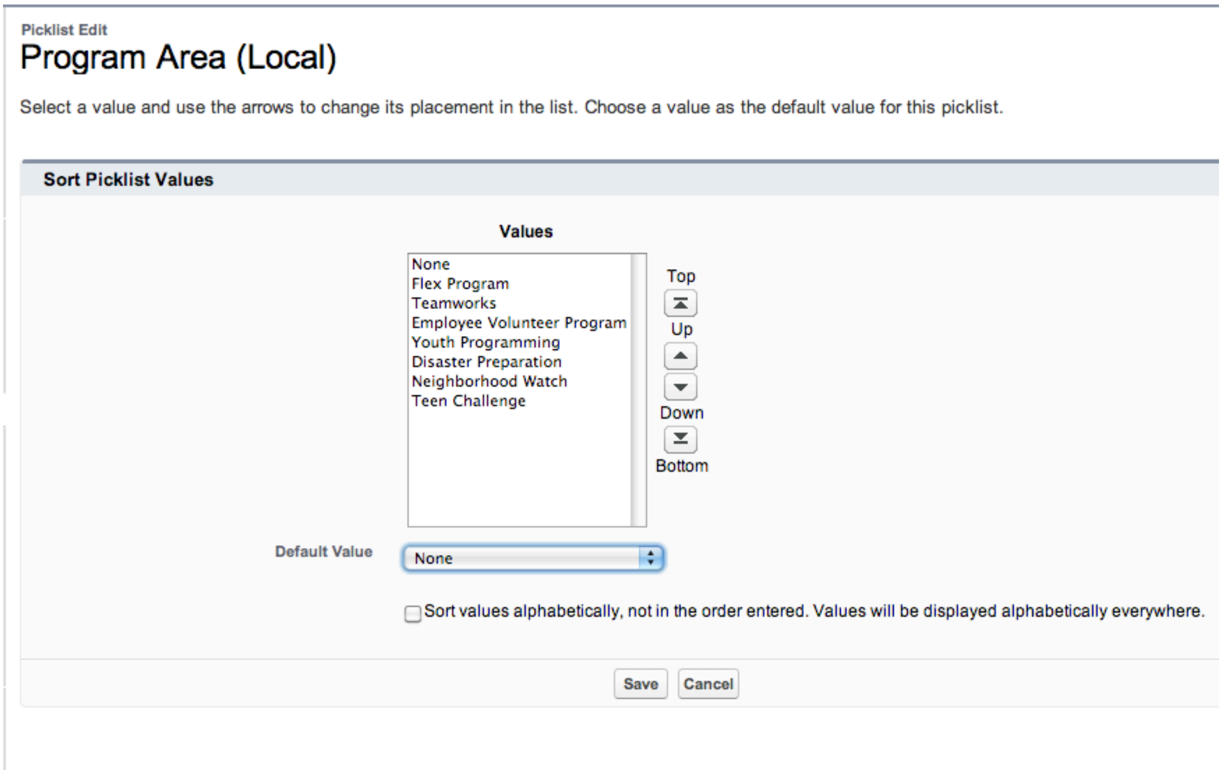

Picklist Values

New | Reorder | Replace | Printable View | Chart Colors

Action	Values	Default	Chart Colors	Modified By
Edit | Del	None		Assigned dynamically	Client Administrator, 7/8/2010 6:33 PM
Edit | Del	Flex Program		Assigned dynamically	Larry Deckel, 9/7/2010 2:21 PM
Edit | Del	Teamworks		Assigned dynamically	Larry Deckel, 8/5/2010 10:38 PM
Edit | Del	Employee Volunteer Program		Assigned dynamically	Larry Deckel, 9/7/2010 2:20 PM
Edit | Del	Youth Programming		Assigned dynamically	Larry Deckel, 9/7/2010 2:20 PM
Edit | Del	Disaster Preparation		Assigned dynamically	Larry Deckel, 9/7/2010 2:21 PM
Edit | Del	Neighborhood Watch		Assigned dynamically	Larry Deckel, 12/13/2010 6:23 PM
Edit | Del	Teen Challenge		Assigned dynamically	Larry Deckel, 12/13/2010 6:23 PM

Click on reorder to determine the order they appear in the list.

Set the Order of the picklist



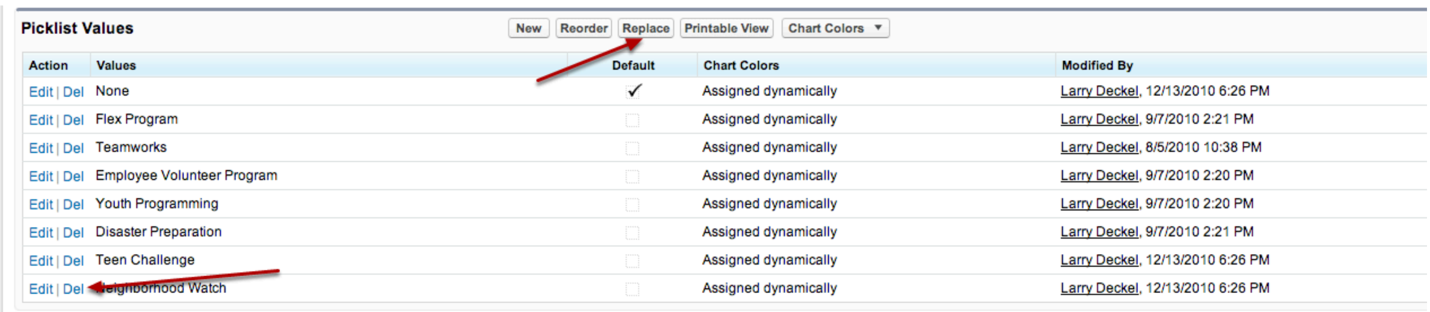
Use the up and down arrow keys to move a selected item up or down in the list to determine the order.

You can also opt to have the values appear alphabetically.

Use the "Default Value" picklist to choose which item should appear by default in the picklist if you want something other than a 'null' value.

Click Save.

Deleting items on the picklist



Picklist Values — New | Reorder | Replace | Printable View | Chart Colors

Action	Values	Default	Chart Colors	Modified By
Edit | Del	None	✓	Assigned dynamically	Larry Deckel, 12/13/2010 6:26 PM
Edit | Del	Flex Program		Assigned dynamically	Larry Deckel, 9/7/2010 2:21 PM
Edit | Del	Teamworks		Assigned dynamically	Larry Deckel, 8/5/2010 10:38 PM
Edit | Del	Employee Volunteer Program		Assigned dynamically	Larry Deckel, 9/7/2010 2:20 PM
Edit | Del	Youth Programming		Assigned dynamically	Larry Deckel, 9/7/2010 2:20 PM
Edit | Del	Disaster Preparation		Assigned dynamically	Larry Deckel, 9/7/2010 2:21 PM
Edit | Del	Teen Challenge		Assigned dynamically	Larry Deckel, 12/13/2010 6:26 PM
Edit | Del	Neighborhood Watch		Assigned dynamically	Larry Deckel, 12/13/2010 6:26 PM

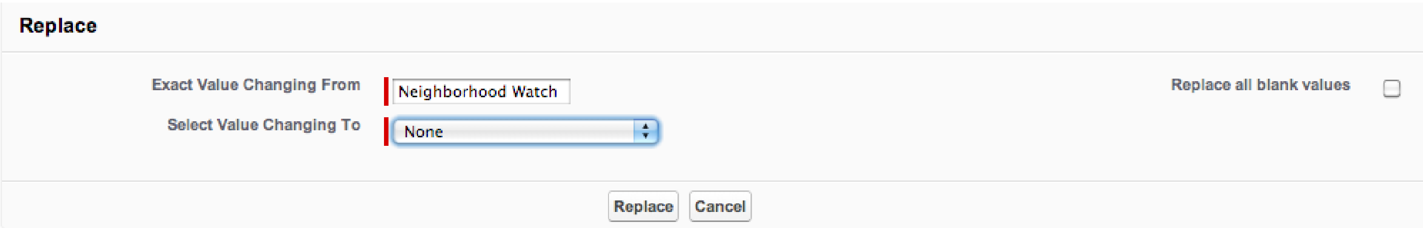
You can delete any item on the picklist by clicking on the **DEL** link.   However, any records already using that value will still retain that picklist value.

(Deleting will prevent any NEW records from using that value - but old records will retain it until edited.)

Instead, you might want to FIRST replace the value of records that are using that existing picklist value.

You do this by clicking on the Replace button.

Replacing one picklist value with another.



Use the **Replace** button on the picklist values list to remove an existing picklist item or rename it.

Put in the exact spelling of the item you wish to remove from the picklist, and then select the item you wish to replace it with.

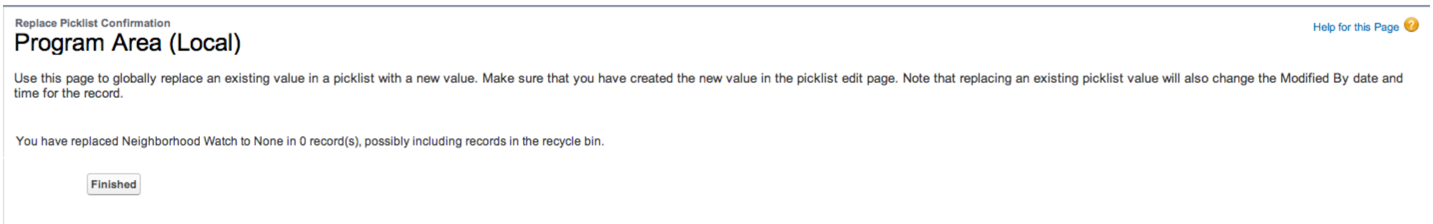
So in this case we're assigning the value to "none".

If I had created a new value named "Neighborhood Safety" -- I would add that first -- and then change "Neighborhood Watch" to Neighborhood Safety!

Click Replace.

Having made the replacement - you can now feel safe about deleting the "Neighborhood Watch" item from the picklist by clicking **DEL**.

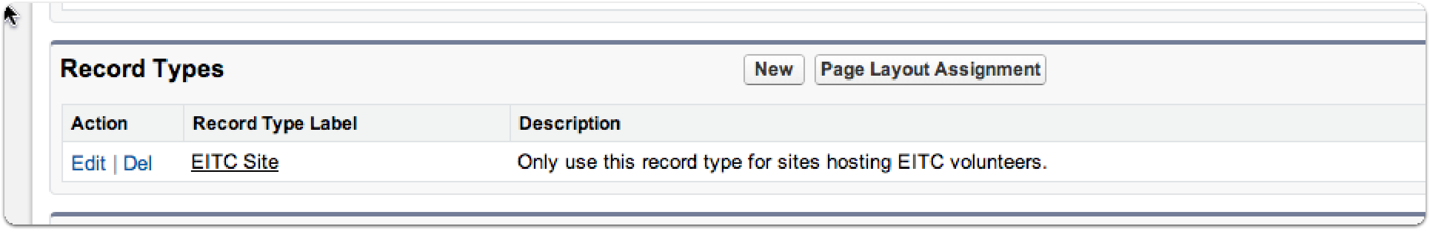
Confirmation Message



You'll get a confirmation message that the picklist values have been changed and replaced.

NOTE: if the object you are editing uses "Record Types" --

you will need to also set the picklist values at the record type level.



Scroll down on the object you're editing and see if it has record types assigned to it. If it does -- you'll need to also set the picklists for each listed record type. (Different record types can use different picklist values :-)

Go to Record Types in the object - and define which of the picklist values for the field you've edited, are available for each record type. Don't forget that even 'contact' has a record type. So always make sure the record type picklist is updated after you've added picklist values to the field itself!

[See this post for information on setting picklist values for different record types.]

(Advanced) Organization Record: How to change the 'type' picklist to make it dependent on Organization Record Type

Organization (Account) picklists present a special challenge, because we have two record types: **Nonprofit** and **Business.**

The same 12 picklist fields appear in both record types -- but the values we might want to have on the picklist may be different depending on whether it is a nonprofit record of a business record.

For example:

There is an editable picklist for organizations called **Goods and Services** which includes all the goods and services that an organization might provide.

And even though we have one picklist for goods and services-- we may only want certain "goods and services" to appear in each record type.

Here's how we made the TYPE picklist, dependent on the **Record Type**

Here is a master list of picklist values for the field "Goods and Services" from the standard object "Organizations" (Accounts)

Picklist Values New | Reorder | Replace | Printable View

Action	Values	Default	Modified By
Edit | Del	Accepts Donated Goods		Larry Deckel, 2/11/2011 7:18 PM
Edit | Del	Employee Gift Matching Program		Larry Deckel, 2/11/2011 7:17 PM
Edit | Del	Food - Catering		Larry Deckel, 2/11/2011 7:17 PM
Edit | Del	Food - Coffee		Larry Deckel, 2/11/2011 7:17 PM
Edit | Del	Food - Special Event		Larry Deckel, 2/11/2011 7:09 PM
Edit | Del	Media - Newspaper		Larry Deckel, 2/11/2011 7:17 PM
Edit | Del	Media - Radio		Larry Deckel, 2/11/2011 7:17 PM
Edit | Del	Media -TV		Larry Deckel, 2/11/2011 7:17 PM

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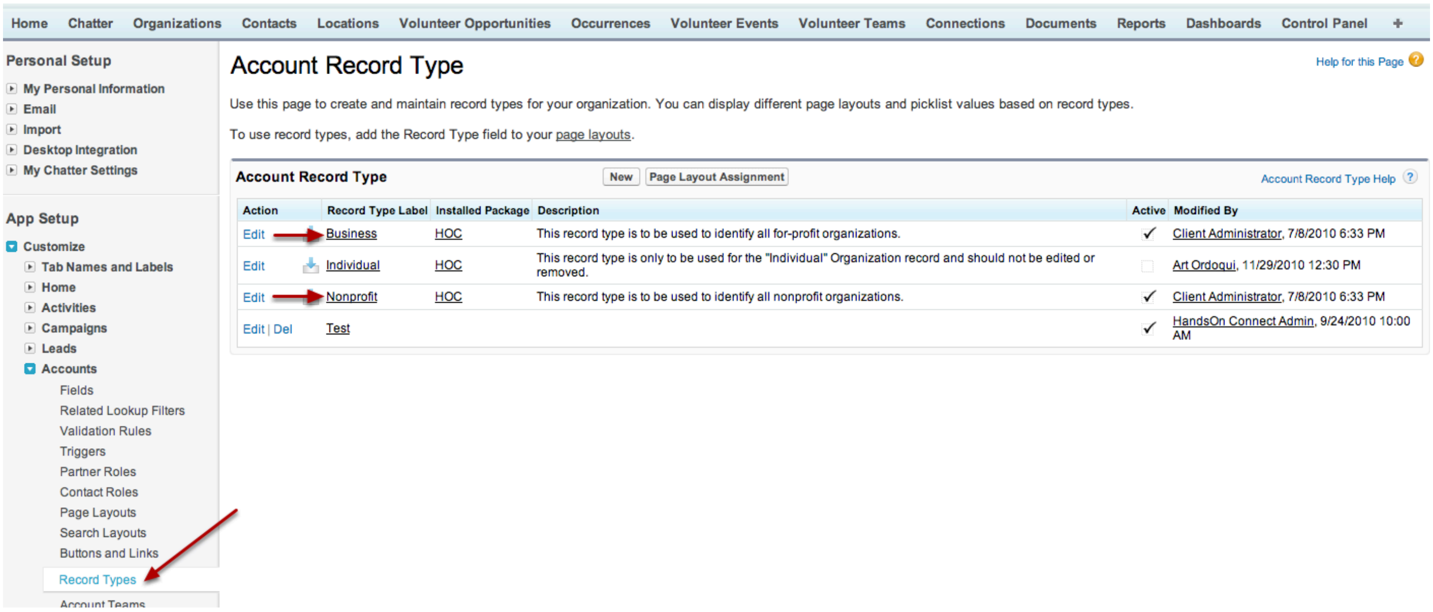
Always show me fewer ▲ / ▼ more records per related list

When I add picklist values to this editable list -- I am adding values that by default, will be part of the picklist for both nonprofit organizations AND Business organizations.

But "Accepts Donated Goods" probably is a value that only applies to nonprofit organizations, and "Employee Gift Matching Program" only applies to businesses.

So I want to control which record type gets which picklist values from this list.

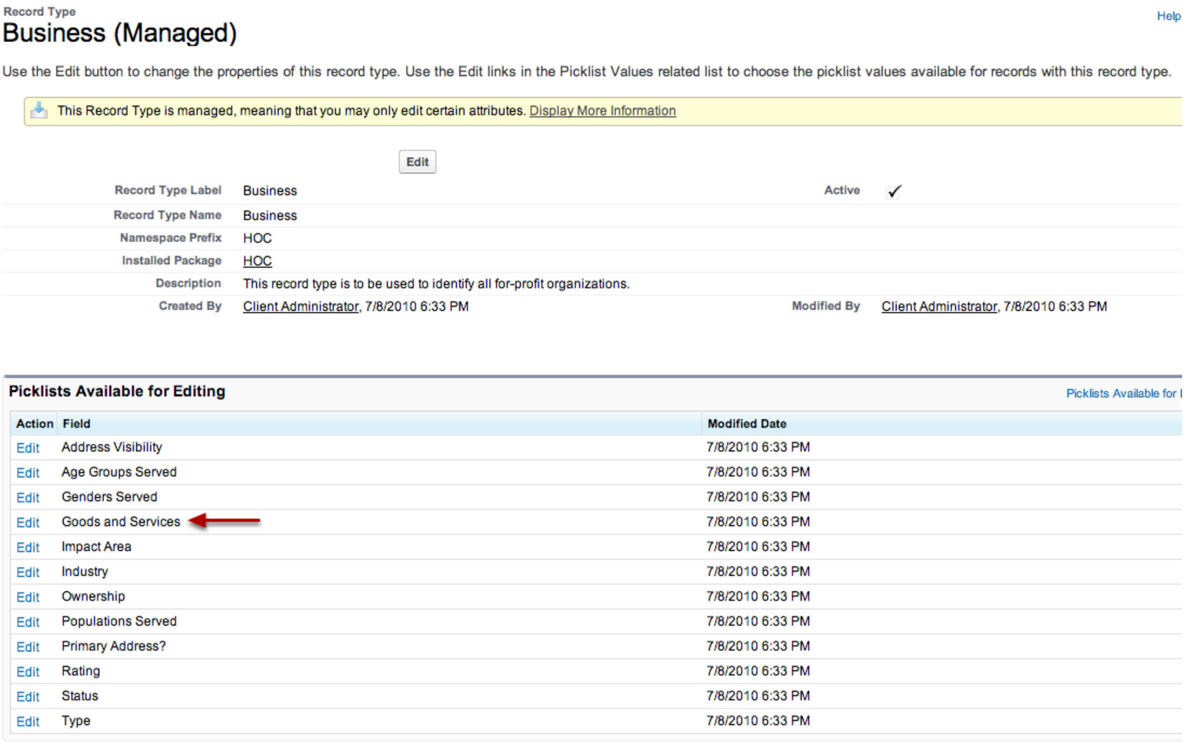
Go to Setup / App Setup / Accounts / Record Types



Remember, in Salesforce, what we call "Organizations" in HandsOn Connect, are called "Accounts". They are the same thing!

We want to make changes to the BUSINESS record type, and to the Nonprofit record type. Click on the hyperlink of Business:

Here in the Business Record Type - You'll now see all the picklists that are available for editing



Record Type

Business (Managed)

Help

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

This Record Type is managed, meaning that you may only edit certain attributes. Display More Information

Edit

Record Type Label	Business	Active	✓
Record Type Name	Business		
Namespace Prefix	HOC		
Installed Package	HOC		
Description	This record type is to be used to identify all for-profit organizations.		
Created By	Client Administrator, 7/8/2010 6:33 PM	Modified By	Client Administrator, 7/8/2010 6:33 PM

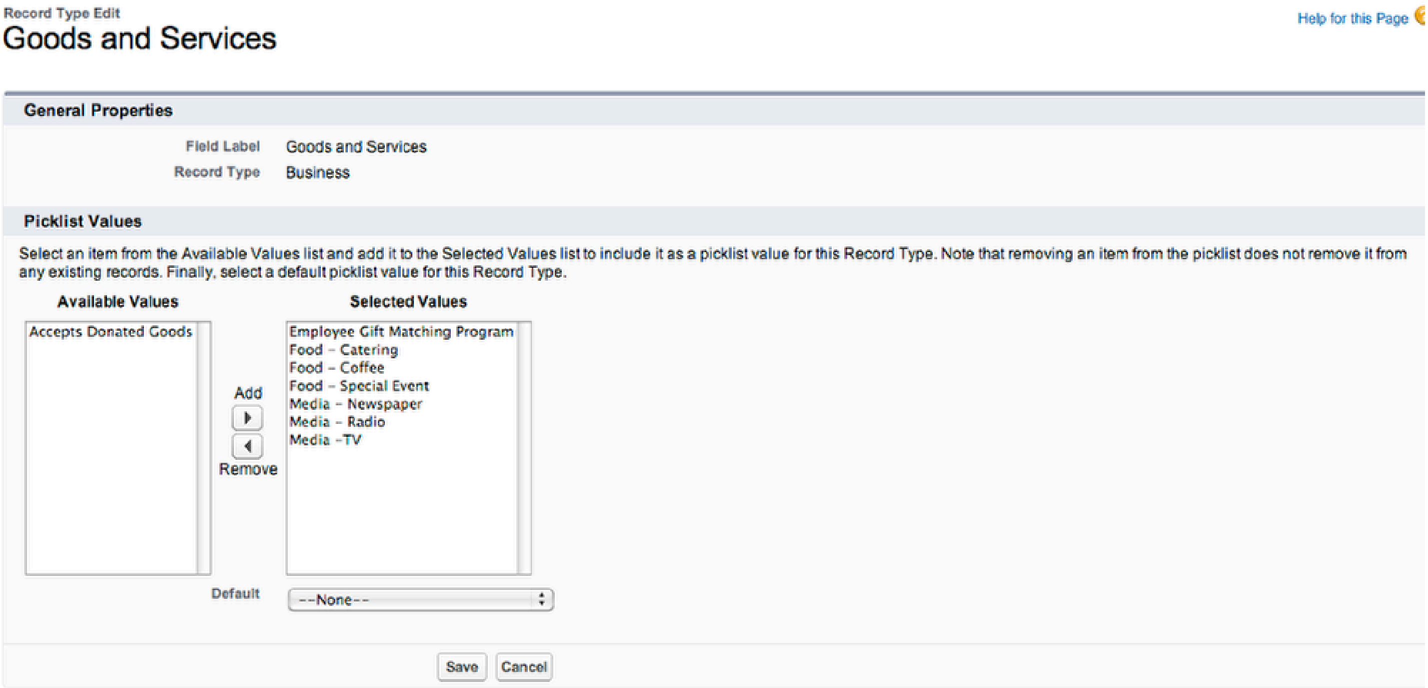
Picklists Available for Editing

Picklists Available for I

Action	Field	Modified Date
Edit	Address Visibility	7/8/2010 6:33 PM
Edit	Age Groups Served	7/8/2010 6:33 PM
Edit	Genders Served	7/8/2010 6:33 PM
Edit	Goods and Services	7/8/2010 6:33 PM
Edit	Impact Area	7/8/2010 6:33 PM
Edit	Industry	7/8/2010 6:33 PM
Edit	Ownership	7/8/2010 6:33 PM
Edit	Populations Served	7/8/2010 6:33 PM
Edit	Primary Address?	7/8/2010 6:33 PM
Edit	Rating	7/8/2010 6:33 PM
Edit	Status	7/8/2010 6:33 PM
Edit	Type	7/8/2010 6:33 PM

In this case, we want to edit the picklist "Goods and Services" so we click on edit

We can now add or remove any of the available picklist values, and set a default value that we wish to have appear (or leave it at none if you want to force the user to make a choice)



We can now edit which values are selected for the Business Record Type from the Available list.

In this case, we have moved over all values **except** "Accepts Donated Goods" (which would apply only to nonprofits).

Now only the desired picklist values appear on the list.

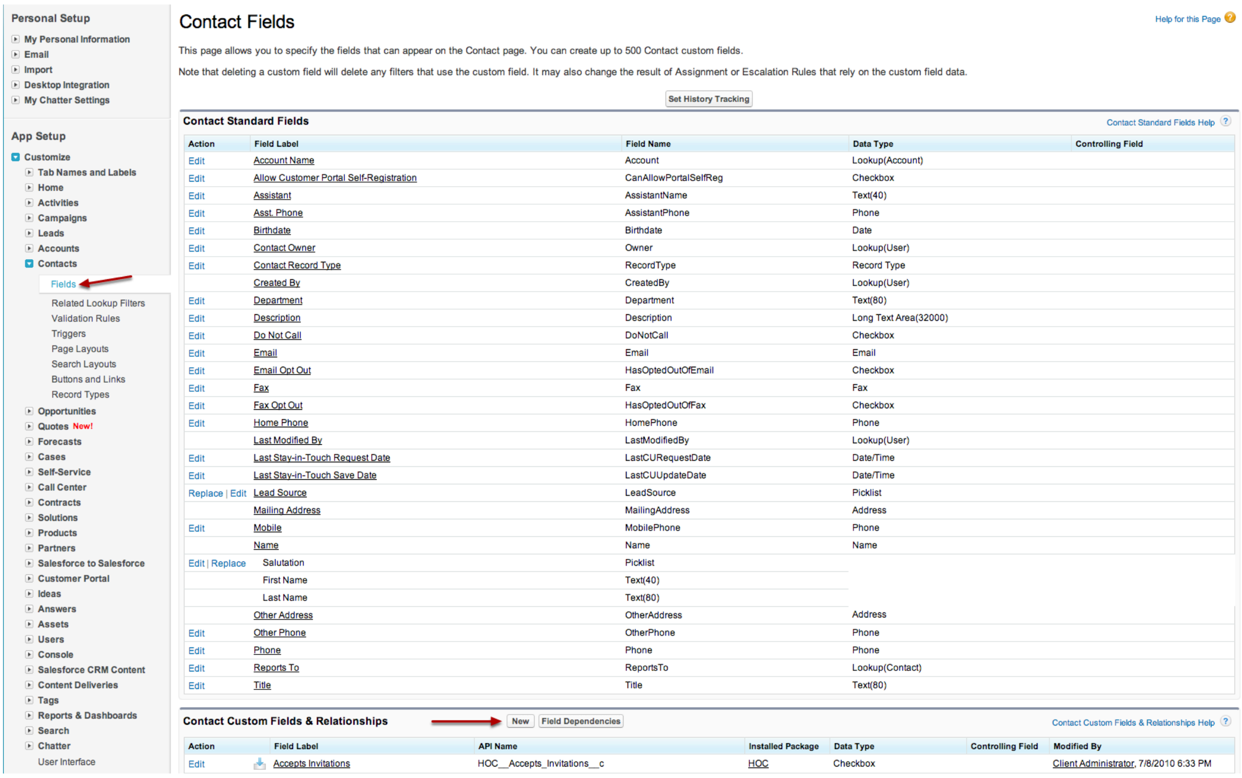
We can repeat this process for the nonprofit record type -- and add the value "Accepts donated goods" and remove the value "Employee Gift Matching Program"

Now only the appropriate picklist values show up for each record type!

Adding custom fields to an object

Adding Custom Fields to an Object

You can add additional fields to an object record to track additional data for that object. As an example, what if we wanted to add a person's **T-Shirt Size**, to a **Contact Record?**

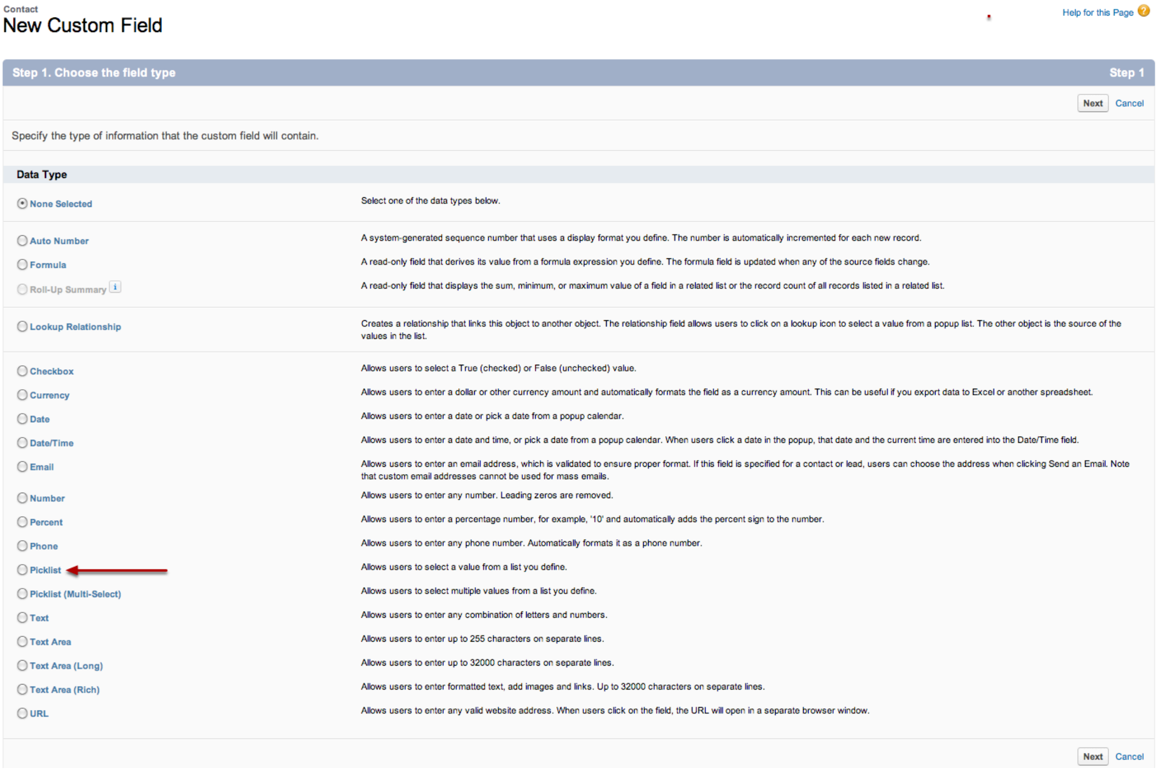


Because this is a standard salesforce object, we get to it by going to **Setup / App Setup / Customize/ Contacts / Fields.**

In Lightning: go to setup / object manager and select the Contact object, then click on "Fields & Relationships".

Any new field we add to the record will be a Custom Field, so we click on the NEW Button in the "Contact Custom Fields & Relationships" section. (In Lightning all fields, both standard and custom are rolled together on the list, so just click "New" to create a new field.

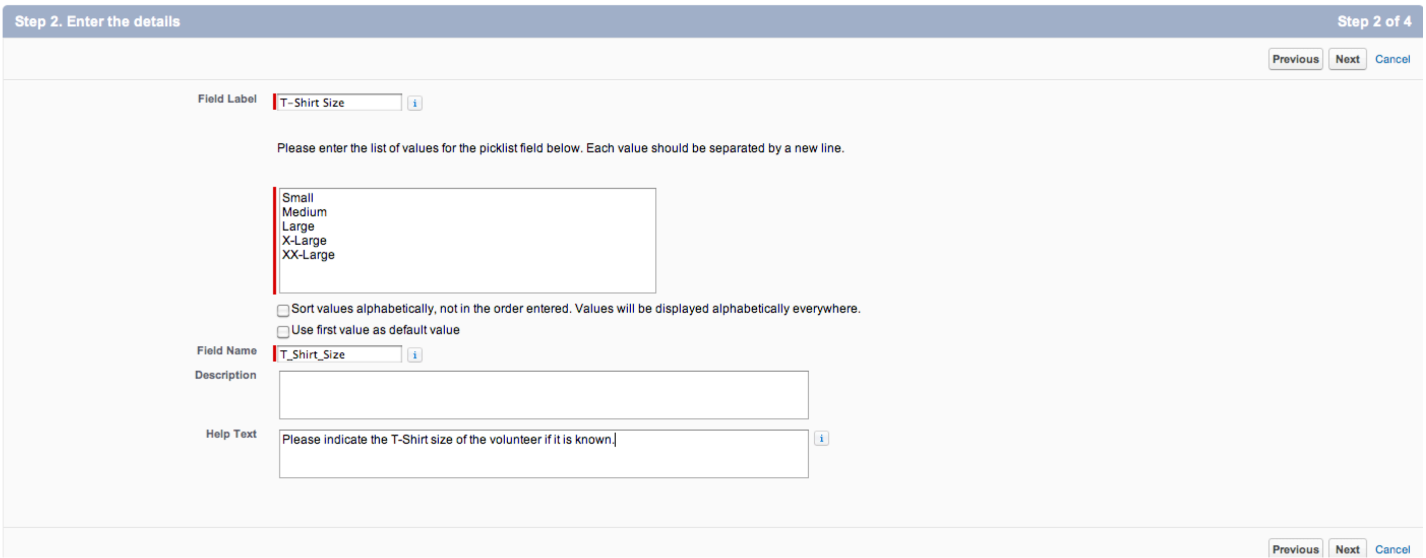
Step 1: Select the Data Type



Depending on the field you are adding, there are a number of field types that can be used.

(*For help on field types, consult Salesforce Help.)*

In this case, we want to add a picklist with the T-Shirt Sizes, so select picklist and click next.



Give the field a label name, and then enter the picklist values.

You can choose an alphabetical sort order, or set the first value to be the default.

Description is an internal field for you if the field needs explanation.

Help Text appears as a help pop-up next to the field itself. Recommended that you use these for any field that isn't completely self-explanatory to make it easier for your users.

Set Field Level security to determine who can SEE or edit the objects values.

Field-Level Security for Profile	☐ Visible	☐ Read-Only
Contract Manager	☐	☐
Customer Portal Manager	☐	☐
Customer Portal Manager Custom	☐	☐
Customer Portal User	☐	☐
Force.com - One App User	☐	☐
Gold Partner User	☐	☐
HOC Platform	☐	☐
HOC Platform Staff	☐	☐
Marketing User	☐	☐
Overage Customer Portal Manager Custom	☐	☐
Partner Staff	☐	☐
Partner Staff Named User	☐	☐
Read Only	☐	☐
Solution Manager	☐	☐
Staff	☑	☑
Standard Platform User	☐	☐
Standard User	☐	☐
System Administrator	☑	☐
Volunteer Leader	☐	☐

There are a LOT of standard Salesforce profiles that will appear in this list, so in can be easier to just make the object visible to ALL profiles. But generally the two main profiles used by HOC users are System Administrator and Staff.... so selecting these two are sufficient.

Note: The list of profiles in your instance may vary.

The two key profiles to either grant or not grant access to are:

- System Administrator

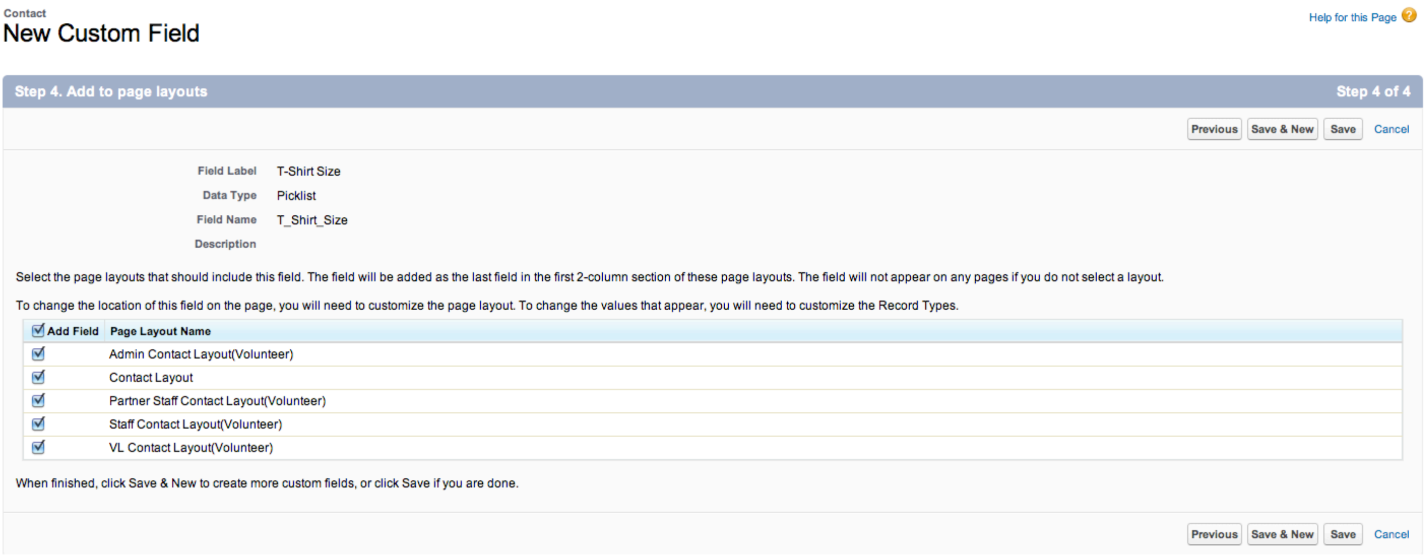
- Staff

Exclude any of these you do NOT want to give access to.

You can also specify **READ ONLY** access if you want a given profile to SEE the value selected in the picklist, but be unable to change its value.

In this case - I've make Staff able to see the field, but NOT to edit it.

Step 4: Add to page layouts



Select the page layouts you wish to make this field available on.

Your list of page layouts may vary depending on which page layouts you have installed or created in your system. You may be only using one page layout for all profiles -- or you may have a separate layout for System Admins and Staff.

By default, the new field will be placed as a new field in the top segment of the page layout. To learn how to place the new field in a specific place of your choosing, see the post on Modifying Page Layouts.

If Desired - Add your new custom fields to report types that use the object your new fields are in

After adding custom fields, they won't automatically show up in your existing reports.

To add custom fields in reports - you'll need to add the fields in the custom report types that pull the fields for the object.

See this post on how to control the fields that are available in report types.

(Advanced) - Formula Fields

At Dreamforce, we were able to attend a session on formulas that was truly amazing. There are lots of posts and discussions about formulas and a great user group so if you need help trouble shooting a formula visit the Help & Training section in your salesforce instance as well as http://www.developerforce.com.

Bringing in Information from the Contact record into another object.

In this example, we are bringing the email and phone numbers associated with the Opportunity Coordinator into the Volunteer Opportunity record.

Basic Formula Field

In Classic: Go To Setup --> App Setup --> Create --> Objects.
Scroll to and click on Volunteer Opportunities

Go to the Custom Fields & Relationships section and select "New"

In Lightning: Go to Setup / Object Manager and select Volunteer Opportunities. Go to Fields and Relationships and select New.

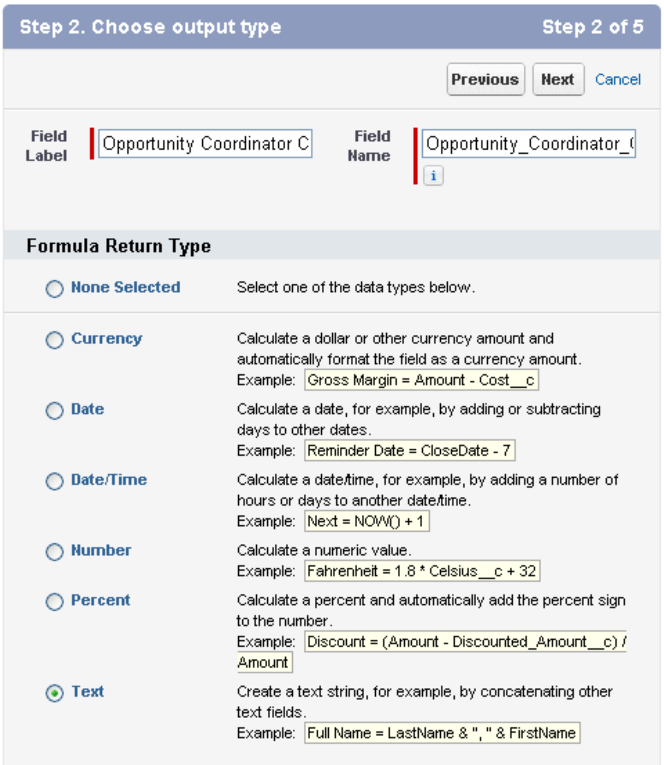
Step 1- Once in the Create New Field select the Type "Formula" and click next.

Step 2- Enter the field label. I used "Opportunity Coordinator Contact Information"

The Field Name field will automatically be populated based on the Field Label

And for the Formula Return Type select "Text"

Then click "Next"



Step 3- Create the formula. Below is the basic formula that we used to bring in the email, Primary Phone? field, and all 4 of the Phone number fields.

"Email: "+HOC__Opportunity_Coordinator__r.Email+" "+BR()+

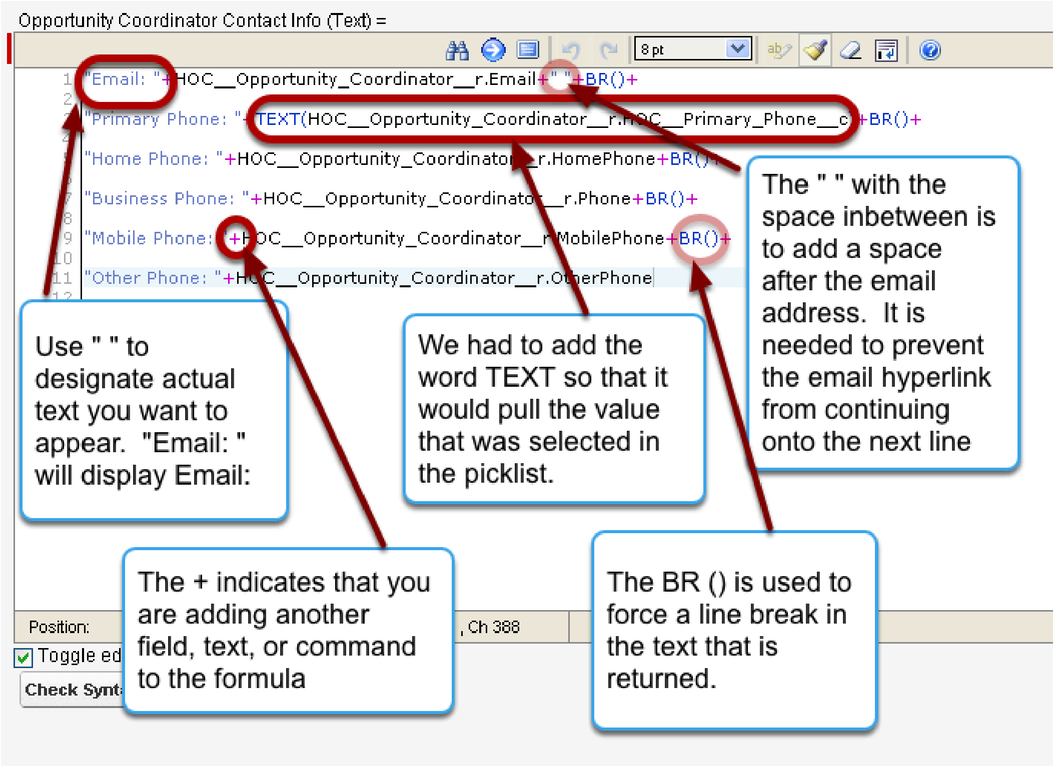
"Primary Phone: "+TEXT(HOC__Opportunity_Coordinator__r.HOC__Primary_Phone__c)+BR()+

"Home Phone: "+HOC__Opportunity_Coordinator__r.HomePhone+BR()+

"Business Phone: "+HOC__Opportunity_Coordinator__r.Phone+BR()+

"Mobile Phone: "+HOC__Opportunity_Coordinator__r.MobilePhone+BR()+

"Other Phone: "+HOC__Opportunity_Coordinator__r.OtherPhone

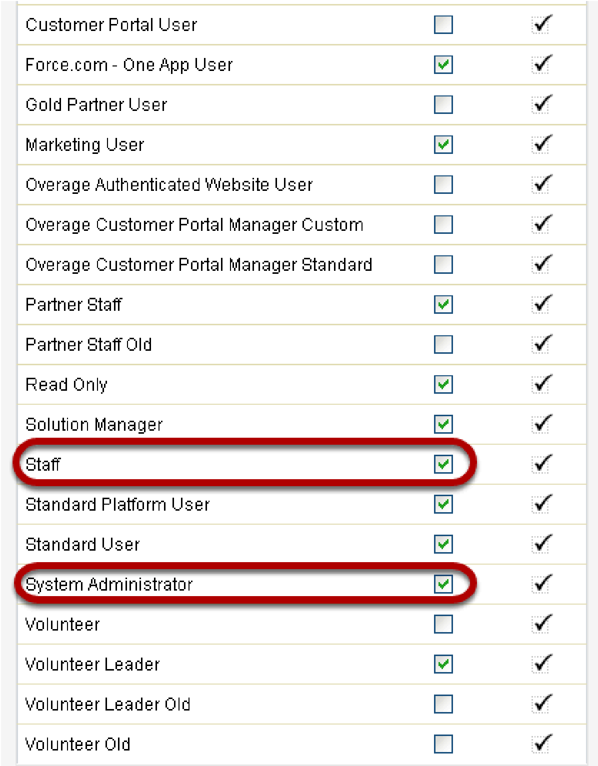


On Step 3 you can also provide the Description and Help Text for this field.

In this step you also designate how to handle blank values as either "0" or blanks.

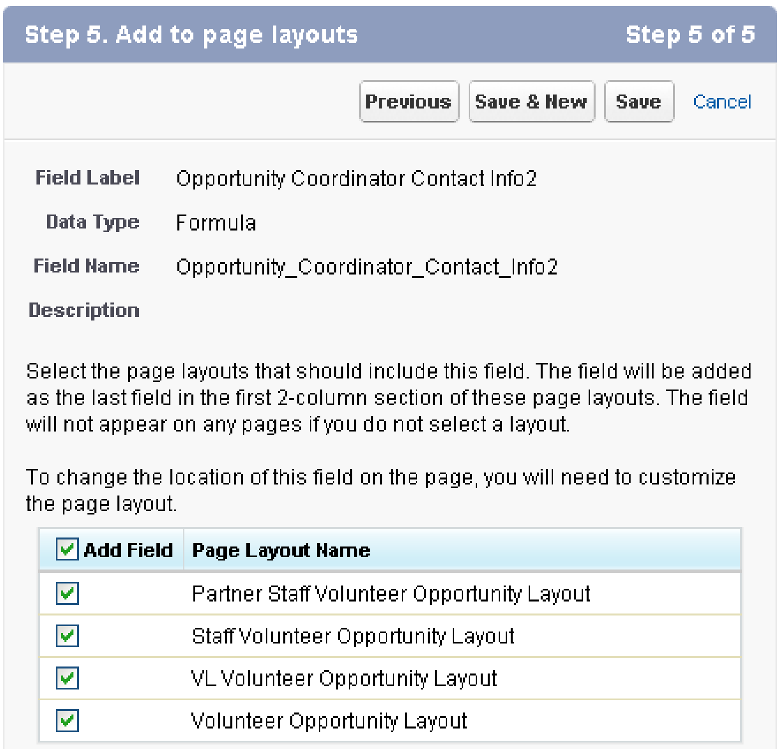
Step 4- In this step you can select the field level security for this new field by designating which profiles have access to this information. We recommend that at minimum you grant access to the System Admin and Staff profiles, and you can also share with the Partner Staff and Volunteer Leaders so that they can confirm that their contact information is correct. Remember that by default all formula fields are READ ONLY.

Once you've set the field level security, then click Next.

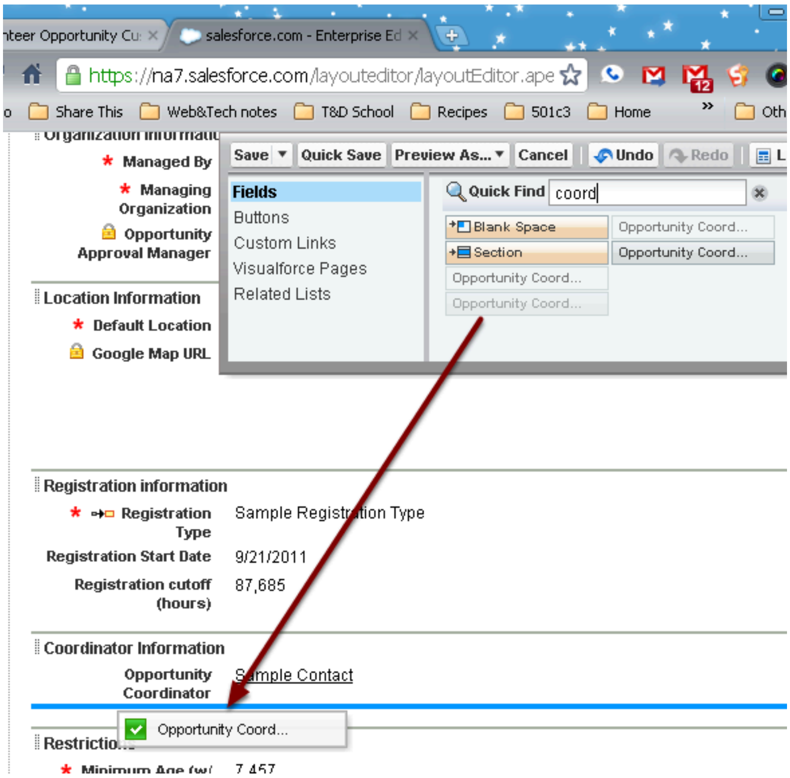


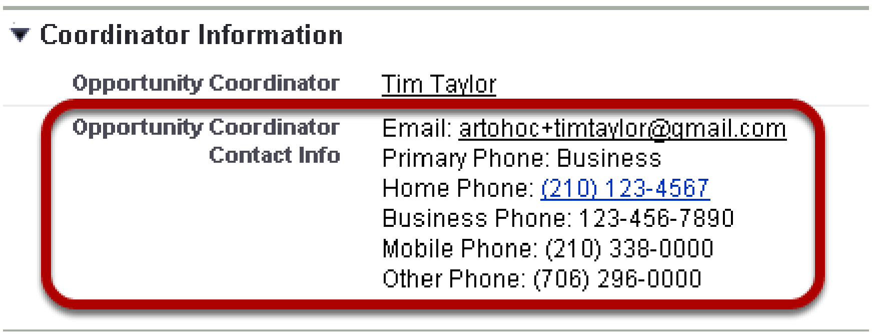
Step 5- In this step you can add the field to the Page layouts. If you add them to any page layout, the field is just insert in the top section so you'll still need to manually go into each page layout and designate exactly where you want this field to appear.

Once you have selected the Page Layouts, if any, to add it to click "Save."



After clicking Save, you are taken back to the Volunteer Opportunity Object page. From here you can go to the Page Layouts and update the placement of the field you just added or even if you didn't add it initially you can use the page layout to add the field now in the desired location. For more information on page layouts click here.





Advanced version of the same formula

We can take the same formula shown above and make it smarter to not display rows that are missing values using this version:

IF(ISBLANK(HOC__Opportunity_Coordinator__r.Email),Null,"Email: "+HOC__Opportunity_Coordinator__r.Email)+" "+BR()+

IF(ISBLANK(TEXT(HOC__Opportunity_Coordinator__r.HOC__Primary_Phone__c)),Null,"Primary Phone: "+TEXT(HOC__Opportunity_Coordinator__r.HOC__Primary_Phone__c))+BR()+

IF(ISBLANK(HOC__Opportunity_Coordinator__r.HomePhone),Null,"Home Phone: "+HOC__Opportunity_Coordinator__r.HomePhone)+BR()+

IF(ISBLANK(HOC__Opportunity_Coordinator__r.Phone),Null,"Business Phone: "+HOC__Opportunity_Coordinator__r.Phone)+BR()+

IF(ISBLANK(HOC__Opportunity_Coordinator__r.MobilePhone),Null,"Mobile Phone: "+HOC__Opportunity_Coordinator__r.MobilePhone)+BR()+

IF(ISBLANK(HOC__Opportunity_Coordinator__r.OtherPhone),Null,"Other Phone: "+HOC__Opportunity_Coordinator__r.OtherPhone)

Adding Traffic Light Image to represent which projects need the most volunteers

In the Occurrence record, you can designate a Minimum and Maximum attendance. The Minimum attendance doesn't have much functionality in the system, but can if you implement this Image Formula, it can be used to help distinguish between occurrences that haven't reached their minimums and those that have, but still have space available versus those that are full.

We will be using the same initial steps as above for the Opportunity Coordinator Contact Info, except that this time we are using the Occurrence Object instead of the Volunteer Opportunities.

Go To Setup --> App Setup --> Create --> Objects.

Scroll to and click on Occurrences

Go to the Custom Fields & Relationships section and select "New"

Step 1- Once in the Create New Field select the Type "Formula" and click next.

Step 2- Enter the field label. I used "Still Need Volunteers?"

The Field Name field will automatically be populated based on the Field Label

And for the Formula Return Type select "Text" (I know we are using an Image, but you still select TEXT)

Then click "Next"

Step 3- Create the formula. In this example we are using an IF Statement to determine the image to return. We are also using some of the sample images that Salesforce provides in the formula. (The last page of this Salesforce guide has a listing of all the URLs for the sample images provided by Salesforce.

The standard format for an IF statement is as follows:

IF(logical test, result if test is TRUE, result if test is FALSE)

EX: IF(HOC__Total_Confirmed__c<HOC__Minimum_Attendance__c, "Needs volunteers", "Has Minimum # of Volunteers needed")

In this example we are saying to check that the Total Confirmed in the occurrence to see if it is LESS THAN the Minimum Attendance for that occurrence. If Total Confirmed is less then enter the text: Needs Volunteers in the field or if Total Confirmed is GREATER THAN OR EQUAL TO the Minimum Attendance then enter the text: Has Minimum # of Volunteers needed.

If statements can also be coupled, for example we instead of returning the "Has Minumum # of Volunteers needed" text when the logical test fails, we can tell it to perform another logic test.

IF(HOC__Total_Confirmed__c<HOC__Minimum_Attendance__c, "Needs volunteers", IF(HOC__Total_Confirmed__c<HOC__Maximum_Attendance__c, "Has Minimum # of Volunteers needed", "Project Full"))

In this example we are saying to check that the Total Confirmed in the occurrence to see if it is LESS THAN the Minimum Attendance for that occurrence. If Total Confirmed is less then enter the text: Needs Volunteers in the field or if Total Confirmed is GREATER THAN OR EQUAL TO the Minimum Attendance then perform another test to see if the Total Confirmed is less than the Maximum Attendance. If the Total Confirmed is less than the Maximum Attendance then enter the text: Has Minimum # of Volunteers needed, if the Total Confirmed is GREATER THAN OR EQUAL TO the maximum attendance then enter the text: Project Full.

Using this second example, we will replace the display text with a traffic light image where:

Green= has not met minimum attendance

Yellow= has met minimum, but not maximum attendance

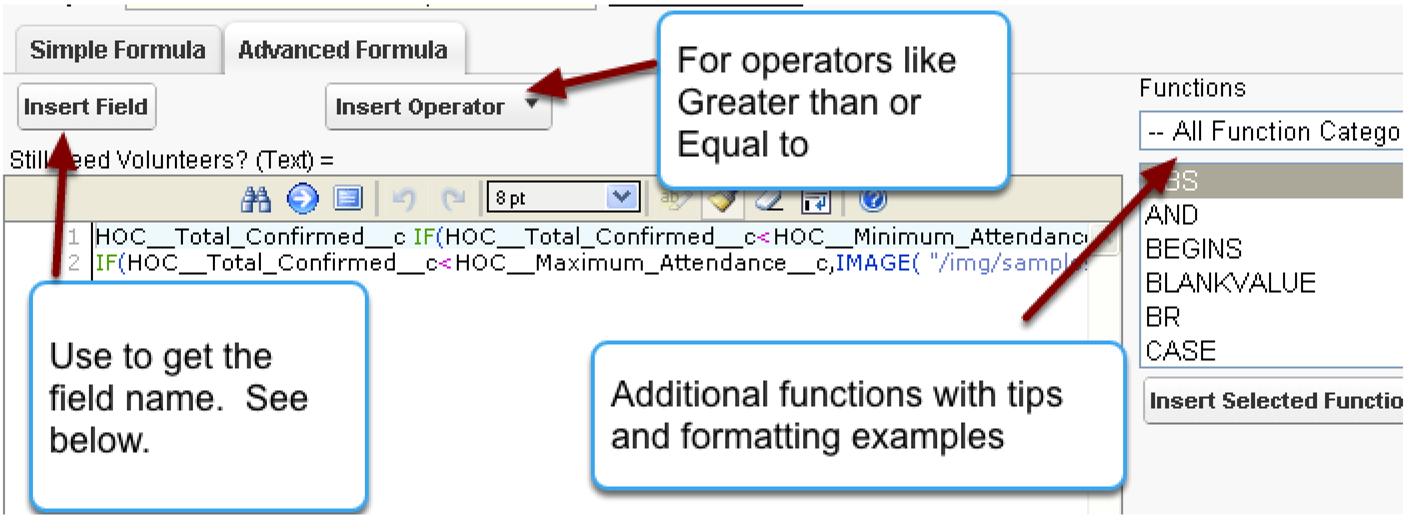
Red= has met maximum attendance

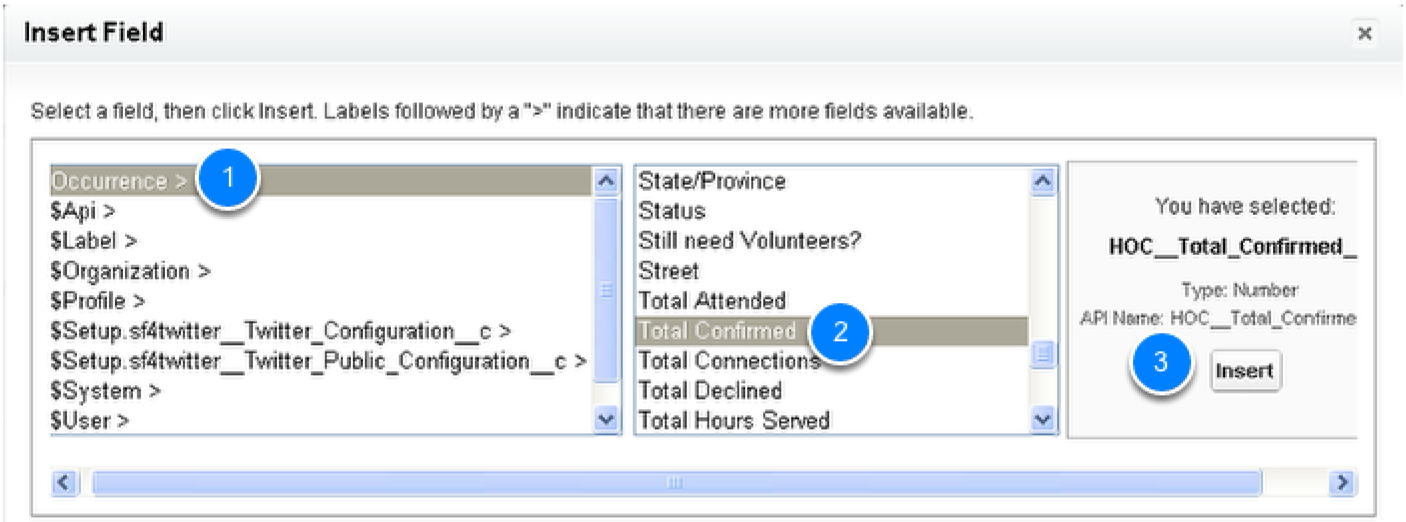
So here's the formula we are using. (**<u>This formula was created using the Advanced Formula tab in step 3)</u>**

IF(HOC__Total_Confirmed__c<HOC__Minimum_Attendance__c, IMAGE("/img/samples/light_green.gif","Green"),

IF(HOC__Total_Confirmed__c>=HOC__Maximum_Attendance__c,IMAGE("/img/samples/light_red.gif", "Red"),IMAGE("/img/samples/light_yellow.gif", "Yellow")))

NOTE: when using an image the formula code is IMAGE("location of the image","Name of image")   The name of the image is what can be used for creating reports, filters, and views.





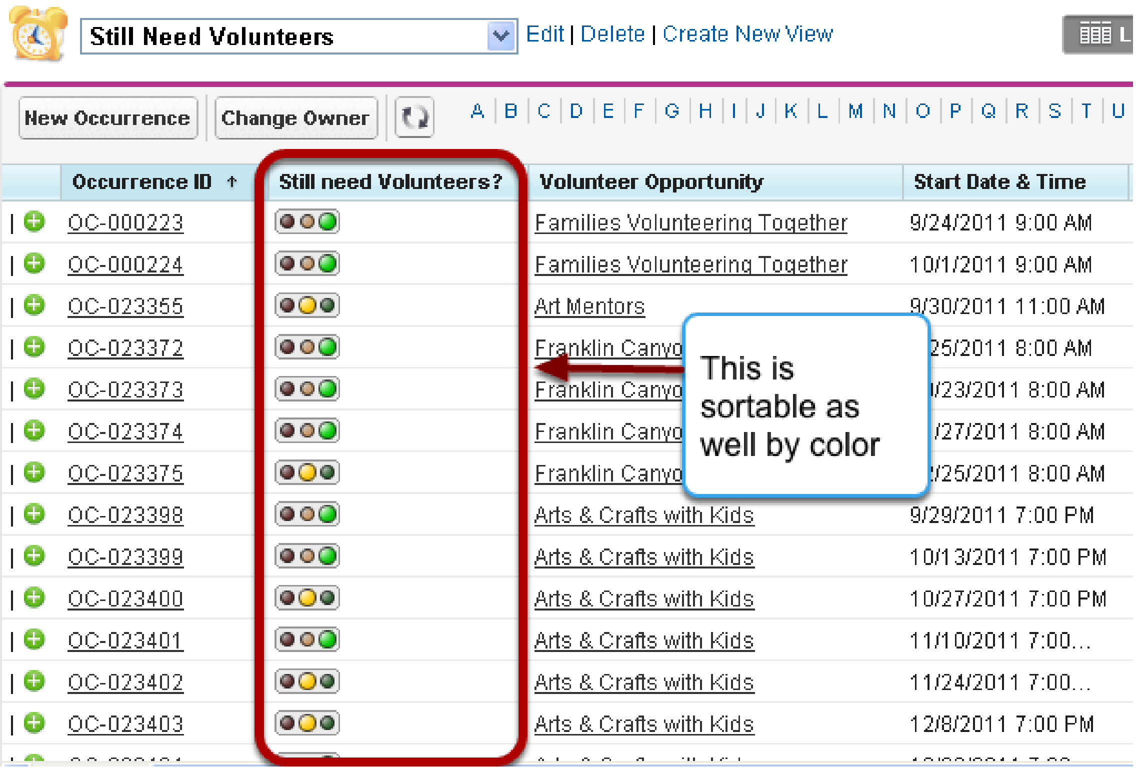
Now that you've created the field you can continue to complete Step 3 to enter the Description and Help Text.

Step 4- Grant the field level access

Step 5- Add to page layout. This traffic light field isn't as helpful in the page layout so our recommendation is not to add it.

Now that the field has been added, you can go to the Occurrence object and create a new view to display which upcoming occurrences still need more volunteers. [For information on creating views, see this documentation].

In this view we are filtering for occurrences that are associated with Schedule Type EQUALS Date & Time Specific and have an End Date & Time GREATER THAN TODAY.



Using Google Charts Wizard to create a Formula Field

This next section is not for the faint of heart and will earn you advanced geek status.

Google has a Chart Wizard that can be used to create some fun charts that can be embedded into your records.

The 30,000 view of what we are about to do is this:

1) Go to Google Charts and create a chart with some false data

2) Copy the code for the chart

3) Create a formula field and copy the chart code into the formula

4) Replace the false data values with links to the field in the record that has the value we want to use for the chart

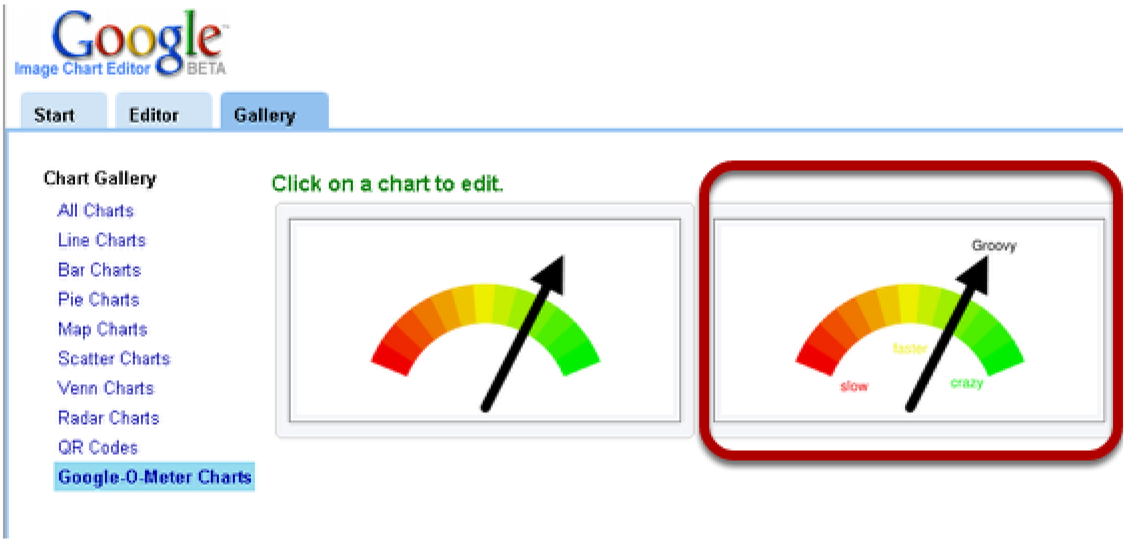
NOTE: **Google Charts: Special Notes / Limitations (As provided in the Dreamforce '11-Formula Ninjas Powerpoint; Sept 1, 2011)**

- HTTP / HTTPS Mixed Content
- Specify Height & Width on Image Function
- Google Chart Wizard is NOT SSL Encrypted
- See Chatter Post for Visual Force Page Usage

Google Chart Wizard

Go to the [Google Chart Wizard]() page.

For this example we will be using the gauge chart, but you can see that this can be applied to bar charts, pie graphs, etc.   To get to the gauge chart click on "Show Full Gallery" and then select "Google-o-Meter" Charts.



Once you select the chart, you are taken to the Editor tab to customize. As you update the fields, the example and chart code are updated.

Here we will set the following parameters:

Y-Axis: Range: 0-100

Labels: Poor

Fair

Great

Title: (Can Skip)

Size: Change to Width: 200; Height:110. Can leave as default if desired.

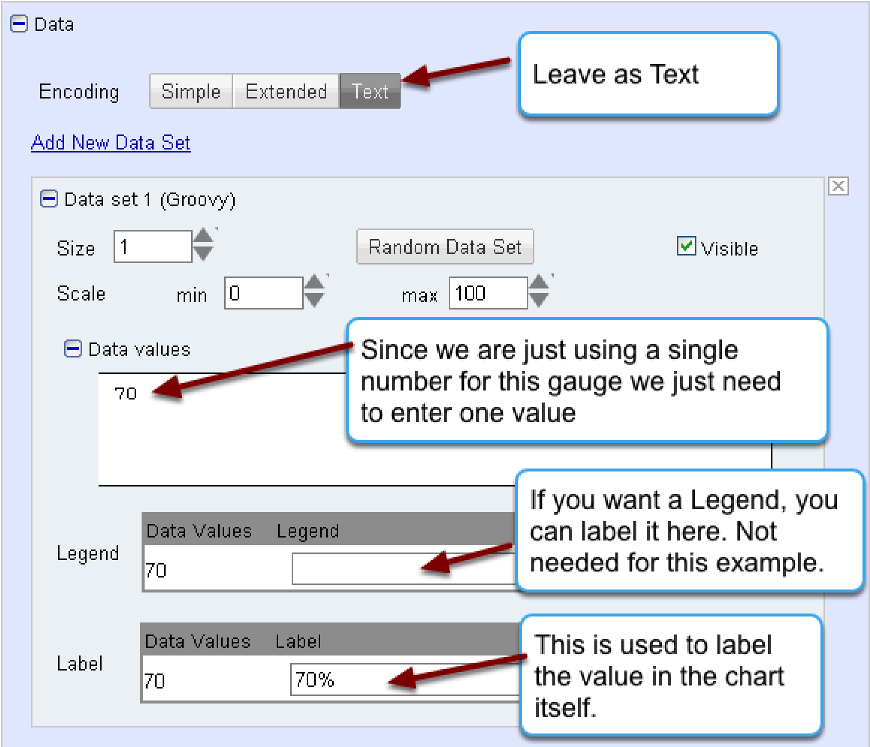
Data: In here we enter some false data to get the necessary code. (See screenshot below for explanation)

Data Style: (Can Skip)

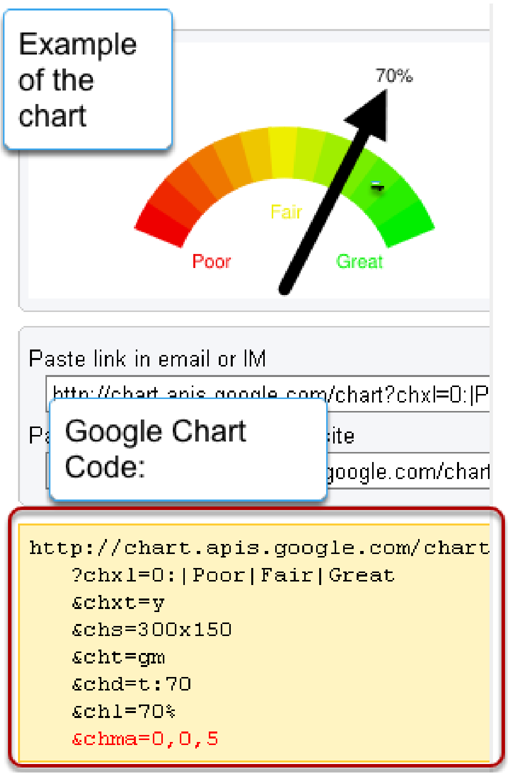
Fills: (Can Skip)

Margins: This is optional. But we can set the margin for the top as 5 to give it some built in buffer for views.

Additional Style: (Can Skip)



Once you've made all the changes we can then copy the code provided by Google Charts



Breakdown of the chart code:

http://chart.apis.google.com/chart (link to the chart)

?chxl=0:|Poor|Fair|Great (provides the labels for the chart)

&chxt=y (designates the use of the Y-axis)

&chs=300x150 (provides the dimensions for the chart- when we enter it into the formula code we will need to reverse the order)

&cht=gm (Represents type of Chart. gm=google-o-meter)

&chd=t:70 (Represents first Data Value)

&chl=70% (Represents data label on the chart)

&chma=0,0,5 (designates the margins (Left, Right, Top, Bottom (missing since it is 0)

Now that we have the code we can create the formula field.

Creating the Chart Formula Field- Attendance Rate

For this example, I had to create a new field to get the attendance rate percentage. I created a formula field with the type= Number; Decimals=0 and the formula (HOC__Total_Attended__c/ HOC__Total_Confirmed__c)*100 I was then able to use this new field to convert the percentage to be shown on the gauge as outlined below:

Just like with the two previous examples, I created a new field using these steps:

Go To Setup --> App Setup --> Create --> Objects.

Scroll to and click on Occurrences

Go to the Custom Fields & Relationships section and select "New"

Step 1- Once in the Create New Field select the Type "Formula" and click next.

Step 2- Enter the field label. I used "Attendance Rate"

The Field Name field will automatically be populated based on the Field Label

And for the Formula Return Type select "Text" (I know we are using an Image, but you still select TEXT)

Then click "Next"

Step 3- Create the formula.

I then copied the Google Chart Code shown above:

http://chart.apis.google.com/chart

?chxl=0:|Poor|Fair|Great

&chxt=y

&chs=300x150

&chht=gm

&chd=t:70

&chl=70%

&chma=0,0,5

I then modified the code to reflect the fields in the occurrence record that I wanted to use in the place of the data.

http://chart.apis.google.com/chart

?chxl=0:|Poor|Fair|Great

&chxt=y

&chs=300x150

&cht=gm

&chd=t:"+TEXT(Attendance_Rate_Percentage__c) + " (This tells the code to pull the value from the Attendance Rate Percentage field and insert it here. Don't forget the " and +)

&chl="+TEXT(ROUND(Attendance_Rate_Percentage__c,0))+"% (This tells the code to pull the value from the Attendance Rate Percentage field and insert it before the % to create the label. Notice we had to tell the code to round

the value to 0 decimals since the actual value in the Attendance rate percentage field is the result of a calculation. Don't forget that the % goes after the ")

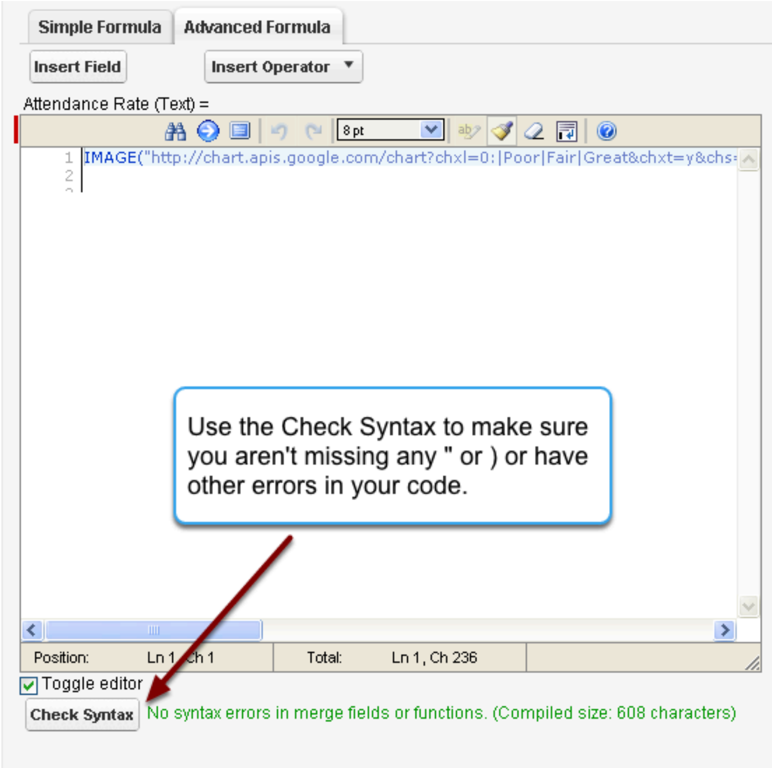
&chma=0,0,5

Now we modify the standard Image formula IMAGE("Source of the Image","Alternative Text", Height, Width) **Remember:** the Height and Width are the opposite of how they are displayed in the Google Chart code.

when we plug in our Google Chart Code the formula looks like this:

IMAGE("http://chart.apis.google.com/
chart?chxl=0:|Poor|Fair|Great&chxt=y&chs=200x110&cht=gm&chd=t:"+TEXT(Attendance_Rate_Perce
+ "&chl="+TEXT(ROUND(Attendance_Rate_Percentage__c,0)) +"%&chma=0,0,5","No Image Available" ,110,200)

NOTE: You don't want carriage returns in the middle of the image source location otherwise it breaks the code.



Now that we have the formula code entered, we can finish creating the field.

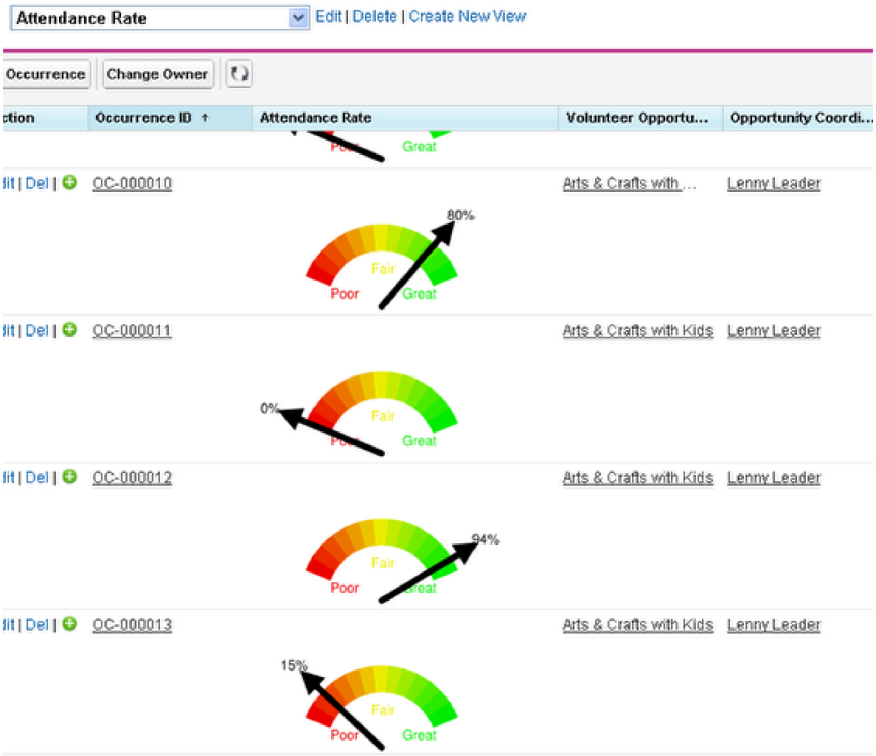
Complete Step 3 to enter the Description and Help Text.

Step 4- Grant the field level access

Step 5- Add to page layout. This traffic light field isn't as helpful in the page layout so our recommendation is not to add it.

Now that the field has been added, you can go to the Occurrence object and create a new view to display which the attendance rates for past projects. [For information on creating views, see this documentation].

In this view we are filtering for occurrences that are associated with Schedule Type EQUALS Date & Time Specific and have an End Date & Time LESS THAN TODAY and Total Confirmed is GREATER THAN 0. The need for the Total Confirmed filter is that those occurrences have an error because you can't divide by 0).

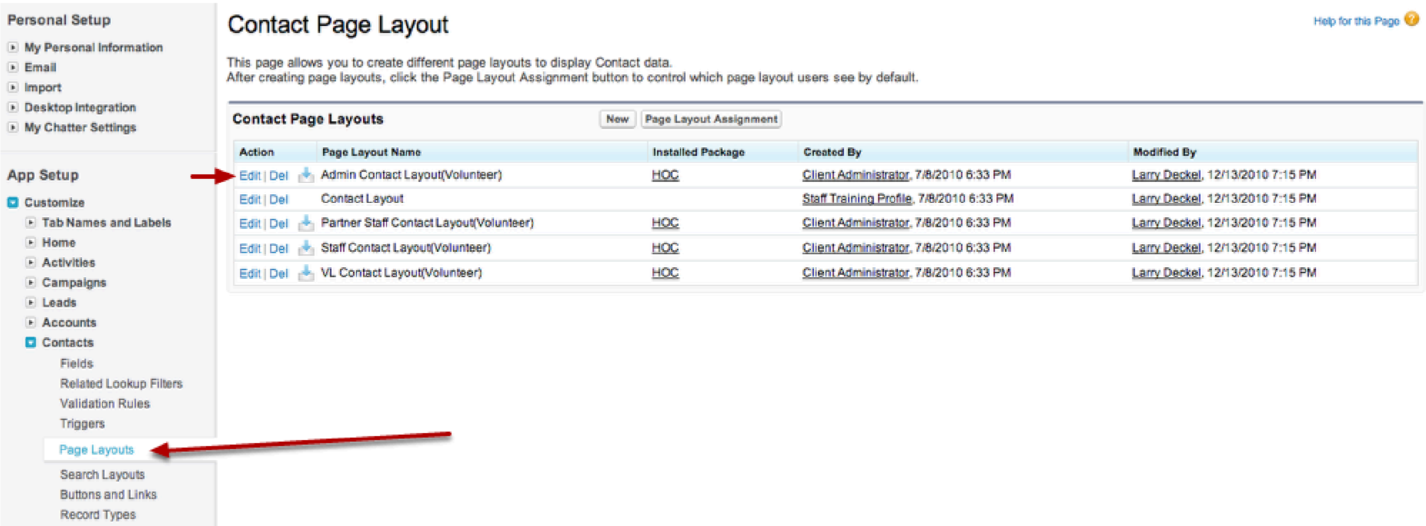


If you would like to see the video of the Dreamforce '11 Formula Ninjas class you can view it on YouTube.

Modifying Page Layouts

Modifying Page Layouts

Each record type typically has its own page layout. In fact, there can be different page layouts for each profile!



You get to the page layout for a standard salesforce object by going to **Setup / Build / Customize / [Field name] / Page Layouts**

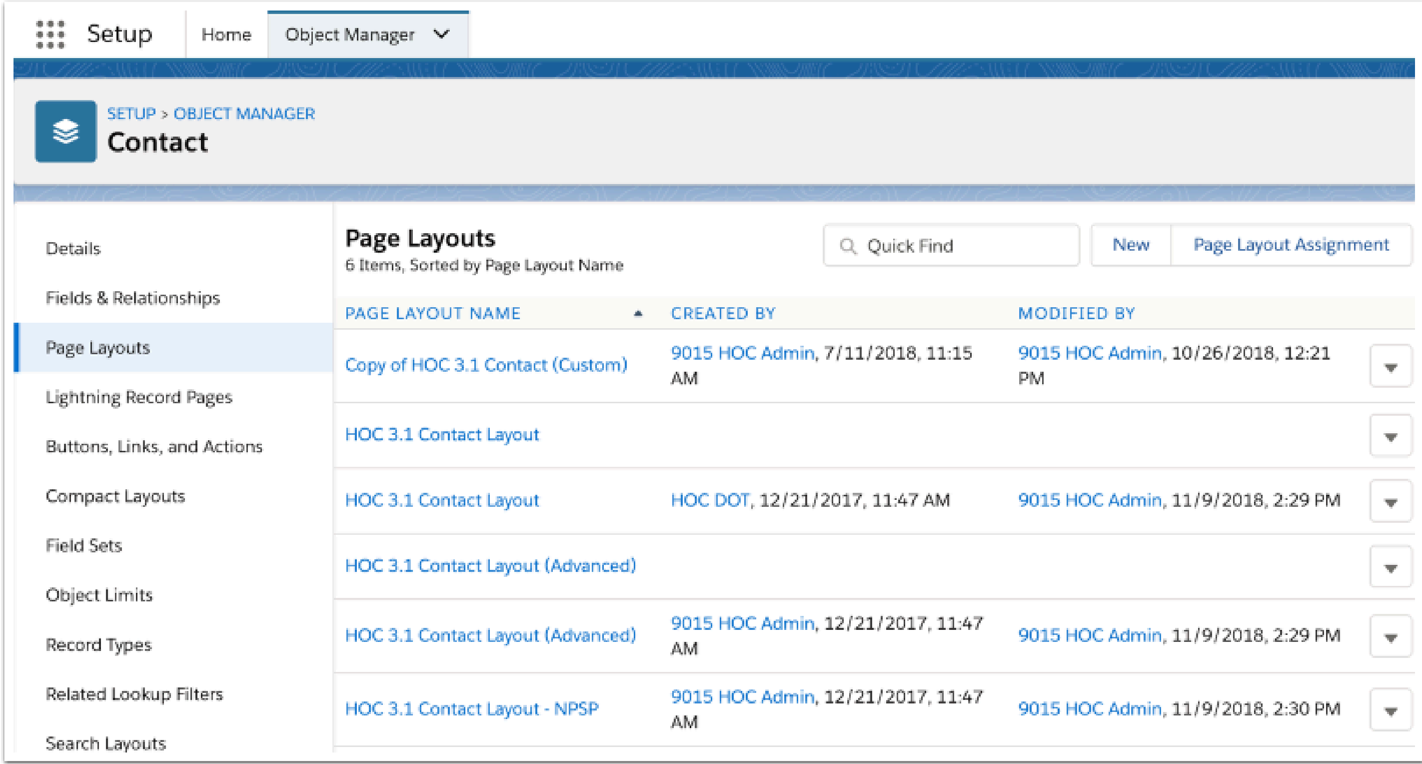
Note: *Page layouts for **custom objects** are found in **Setup / Create / Objects** and then you select the custom object hyperlink for the object you want to access.*

*I**n Lightning**: you get to page layouts by going to Setup / Object Manager, selecting your object, and you'll find "Page Layouts" in the left column.*

There are usually two profiles in HandsOn Connect which have Page Layouts associated with them.

1) SYSTEM ADMINISTRATOR

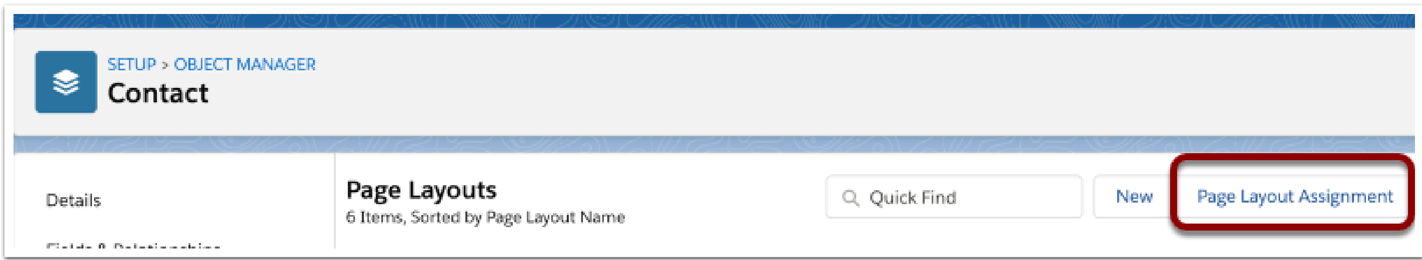
2) STAFF

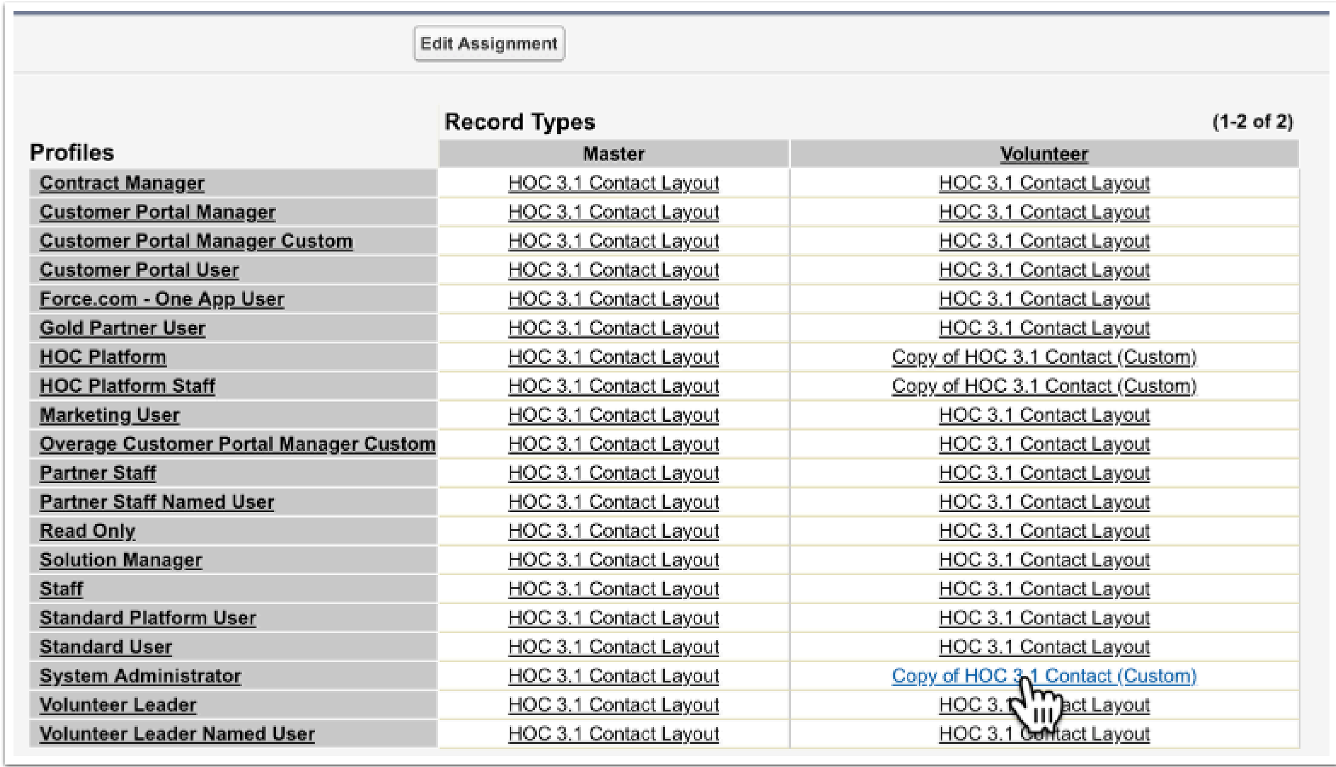


Click on the Right arrow (Lightning) and select Edit to Edit a page layout.

Seeing which page layouts are used by which profiles

Click on "Page Layout Assignment" to see which page layout is assigned to which profile. You can also reassign page layouts here.





Edit Assignment

Profiles	Record Types: Master	Volunteer
		(1-2 of 2)
Contract Manager	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Customer Portal Manager	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Customer Portal Manager Custom	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Customer Portal User	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Force.com - One App User	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Gold Partner User	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
HOC Platform	HOC 3.1 Contact Layout	Copy of HOC 3.1 Contact (Custom)
HOC Platform Staff	HOC 3.1 Contact Layout	Copy of HOC 3.1 Contact (Custom)
Marketing User	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Overage Customer Portal Manager Custom	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Partner Staff	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Partner Staff Named User	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Read Only	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Solution Manager	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Staff	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Standard Platform User	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Standard User	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
System Administrator	HOC 3.1 Contact Layout	Copy of HOC 3.1 Contact (Custom)
Volunteer Leader	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout
Volunteer Leader Named User	HOC 3.1 Contact Layout	HOC 3.1 Contact Layout

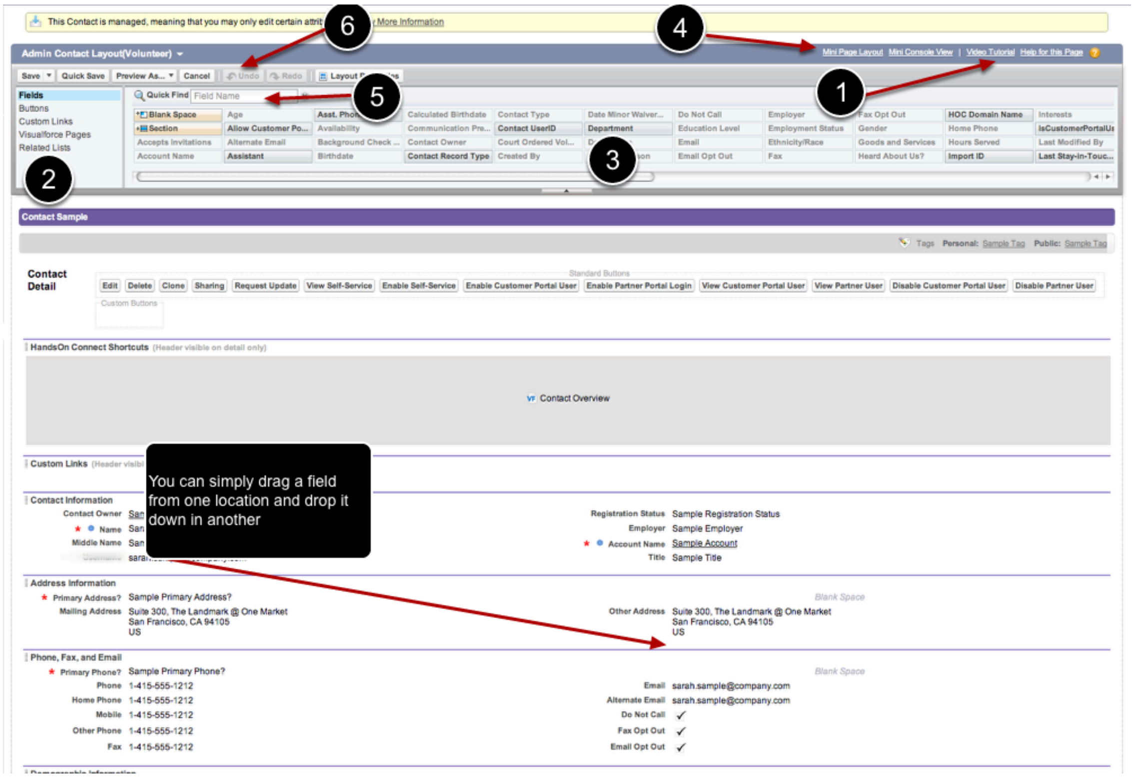
In the example above, the Contact Volunteer Record Type, has the page layout "Copy of HOC 3.1 Contact (custom)" assigned to the System Administrator, and the "HOC 3.1 Contact Layout" assigned to the Staff Profile.

Click on Edit Assignment to reassign which page layouts are assigned to which profiles.

NOTE: In HOC 3.0, the only layouts you can edit in Salesforce are for Admin (System Administrators) and Staff. The Partner Staff and VL page layouts are not editable via Salesforce. To Edit these page layouts in the sharing portal - open a zendesk ticket.

Editing a Page Layout:

Clicking on edit for a page layout will open a WYSIWYG edigtor.



1. **Click on the hyperlink "Video Tutorial" in the top right to learn how to make edits to the page. This is a good instructional overview.** Also see the HELP section to the right of this link for more details.

2. You can select to see a list of available fields, buttons, custom links, visualforce pages, and related lists in the palette tray to the left.

3. Drag any available item from the palette tray to the right, directly into place on the page below. Remove items by dragging them back up into the tray.

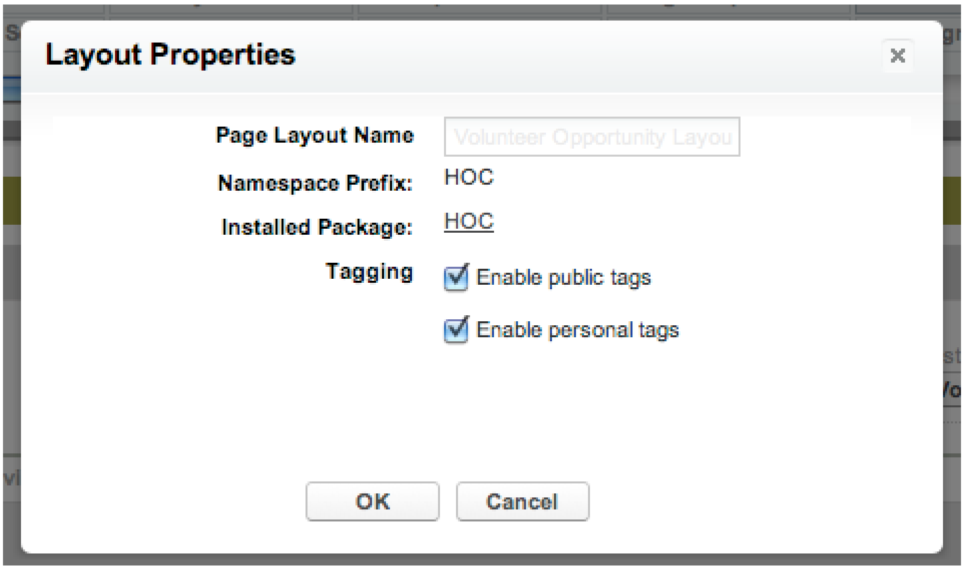
4. The Mini-Page Layout determines the pop-up hover fields that show up when this object is displayed as a lookup in another record type.

5. Use quick find to quickly find the field you're looking for.

6. The undo button lets you undo the last action you took.

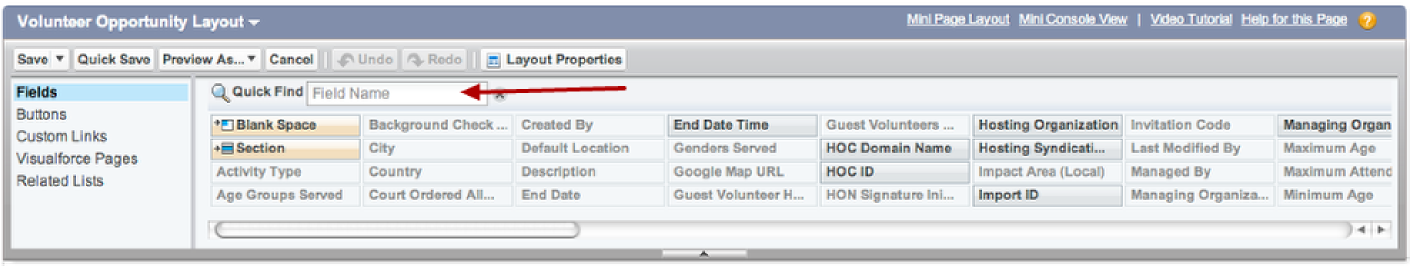
In this case of the T-shirt field we added in a previous article -- if it appeared on this layout we could just drag it from one location to another.

Layout Properties



Because this is a managed page layout, you cannot change its name. However you can enable or disable personal and public tags for the object here.

You can add buttons, custom links and related lists to a layout by clicking on them in the left of the object palette

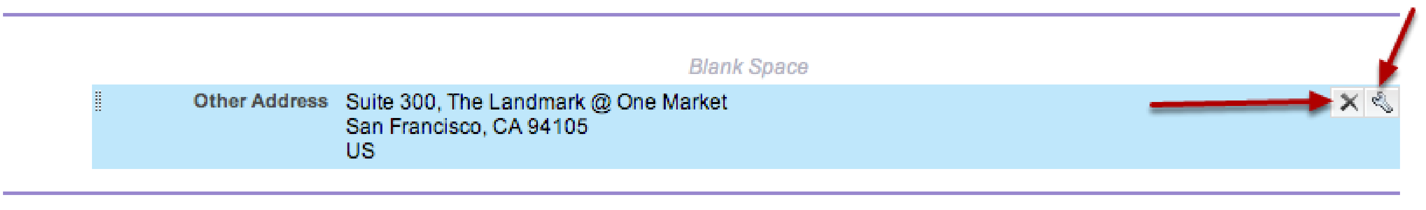


Use the Quick Find search to quickly find the field or item you are looking for.

Then drag and drop it onto the page layout below.

Mobile & Lightning Actions determine the actions available when using Lightning.

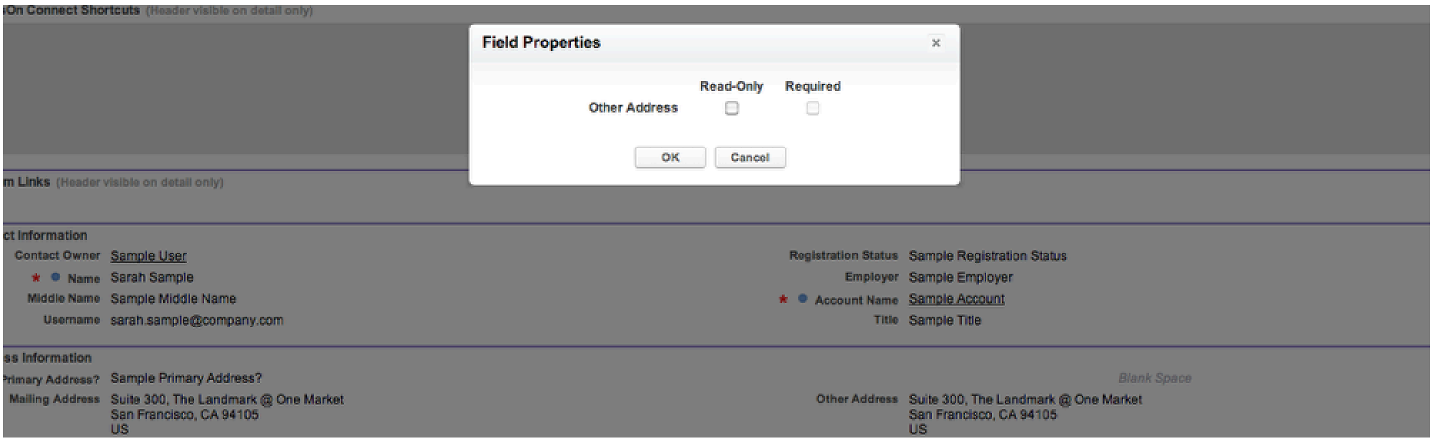
Working with Fields in the layout



Each field in the layout has an 'x' icon which quickly removes an object from the page layout.

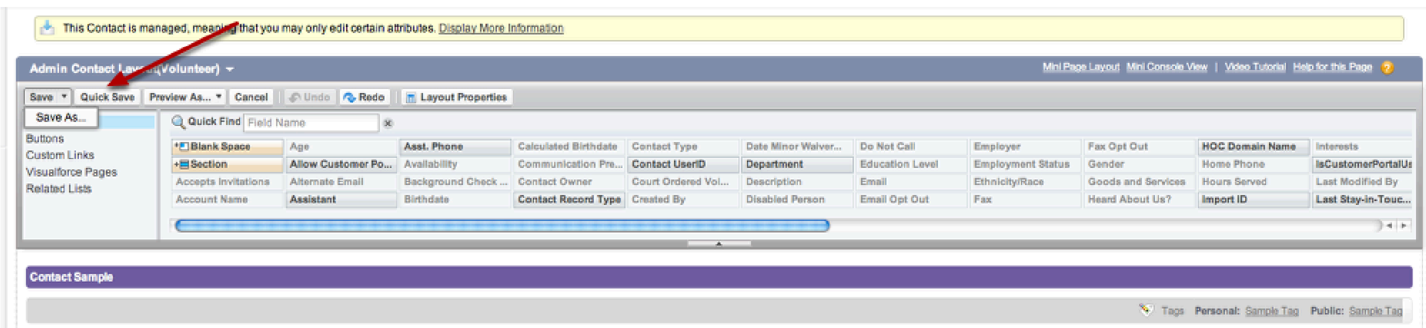
Or you can drag it back into the field tray.

Clicking on the wrench icon allows you to set field properties



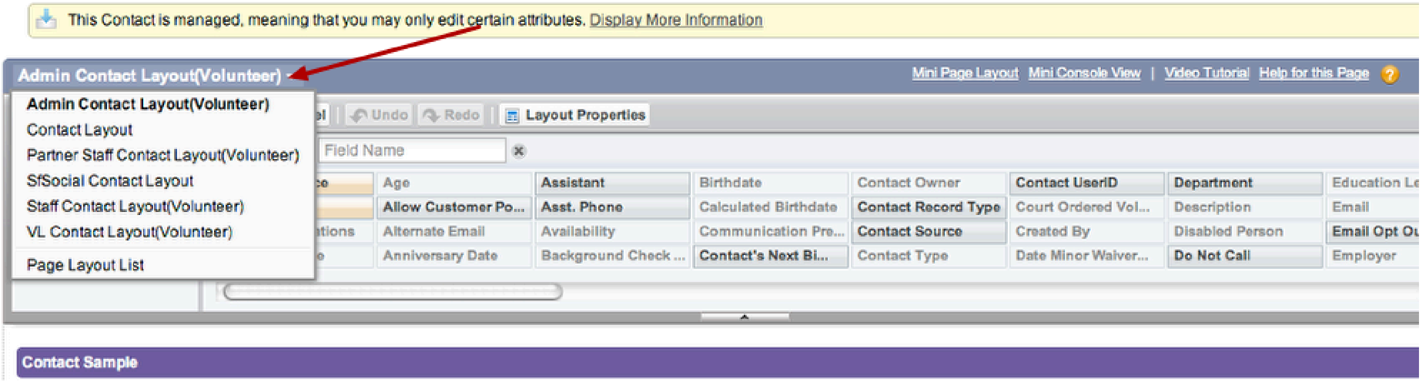
You can make a field READ ONLY for that layout, or a REQUIRED field.

Click QUICKSAVE to commit the changes for this field layout without closing the layout editor.



If this is the only layout you're editing you can use SAVE. But if you want to quickly edit the other page layouts, use Quick Save.

Use the layout type picklist to quickly choose and jump to another layout you wish to edit.

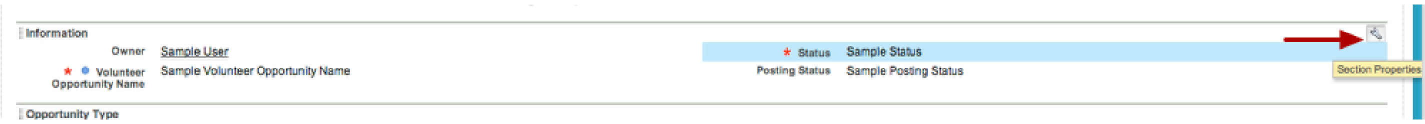


Click SAVE when you have edited all the layouts for this object you wish to change.

Working with Sections in the page layout

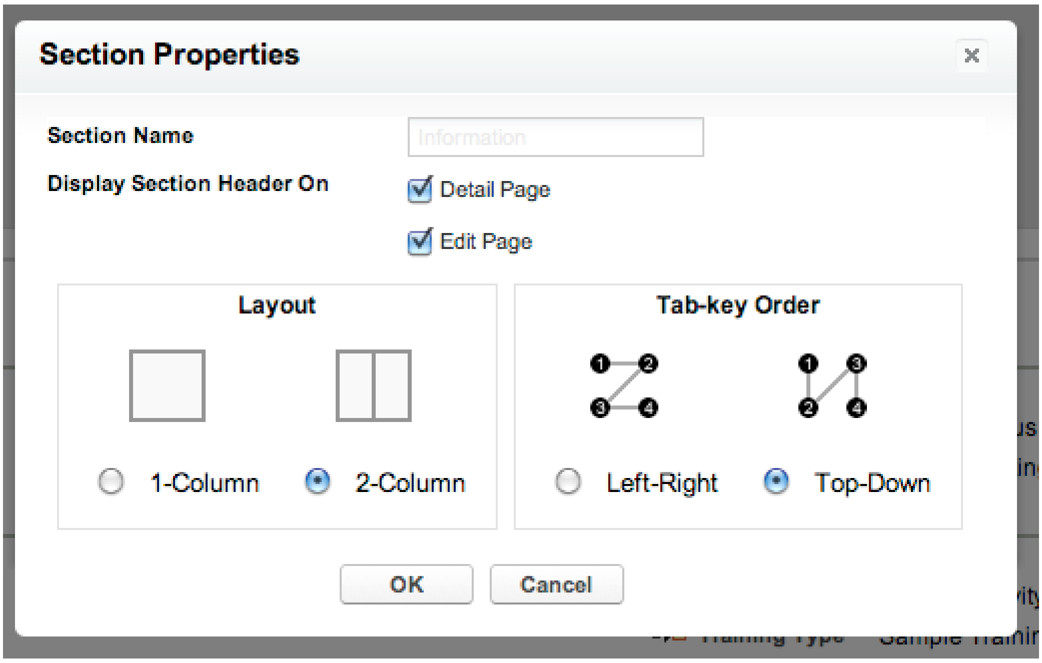
A page layout is made up of sections.

Editing Sections



Click on the wrench across from the section name to edit characteristics of a section.

Section Properties



You cannot rename a section that is part of a managed object, but you can change the layout from 2 columns to 1, and set the tab-key order.

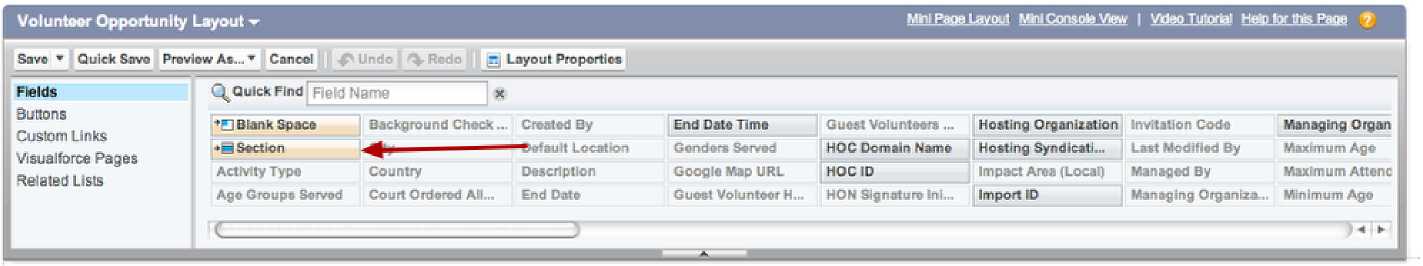
You can determine whether or not a section appears when you are in the edit mode.

Sections can also be dragged and dropped to different locations on the page layout.

You can drag and drop sections to change the order in which they appear

If you don't like where they wound up, hit CTRL-Z to undo the move.

You can add additiional sections by grabbing the SECTION item from the palette and dragging it onto the layout.



You then define its section properties and can give it a section name.

While you cannot rename a section that is part of the managed product - you can do this!

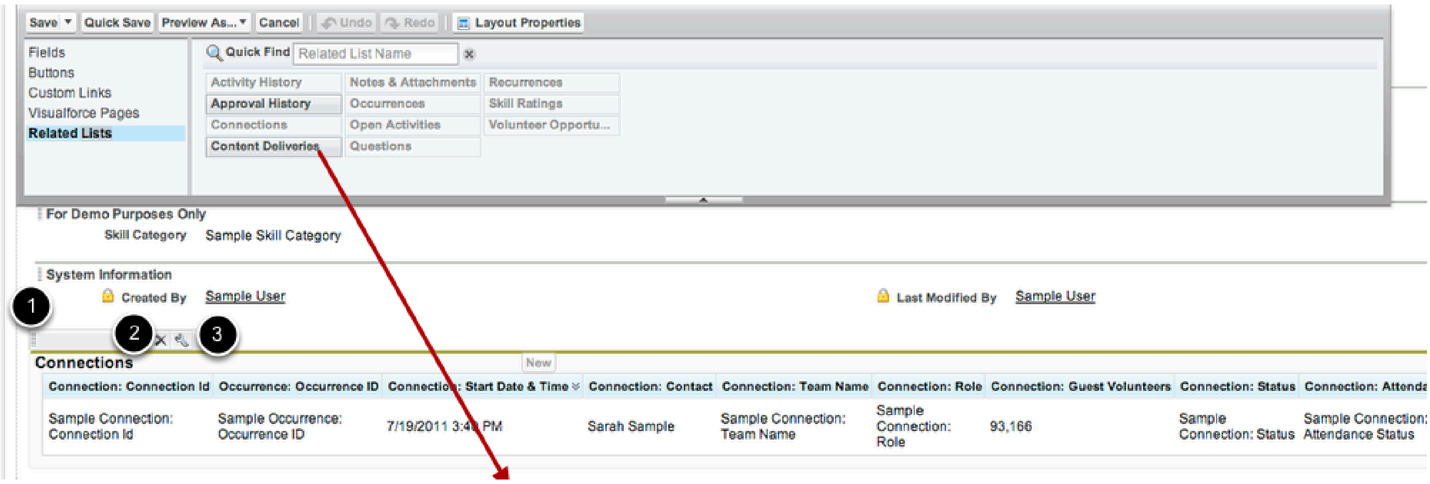
1. Create a new section with the name you want to use
2. Drag it onto the layout
3. Drag the fields from the managed section, to your new one.
4. Remove the old section from the layout!

Editing the Related Lists in Page Layouts

Related lists can be added, reordered or removed from the layout in the same way as you did with sections.

You can also edit which related lists appear in a layout, as well as which fields appear in the related list.

Adding or Deleting Related Lists to page layouts



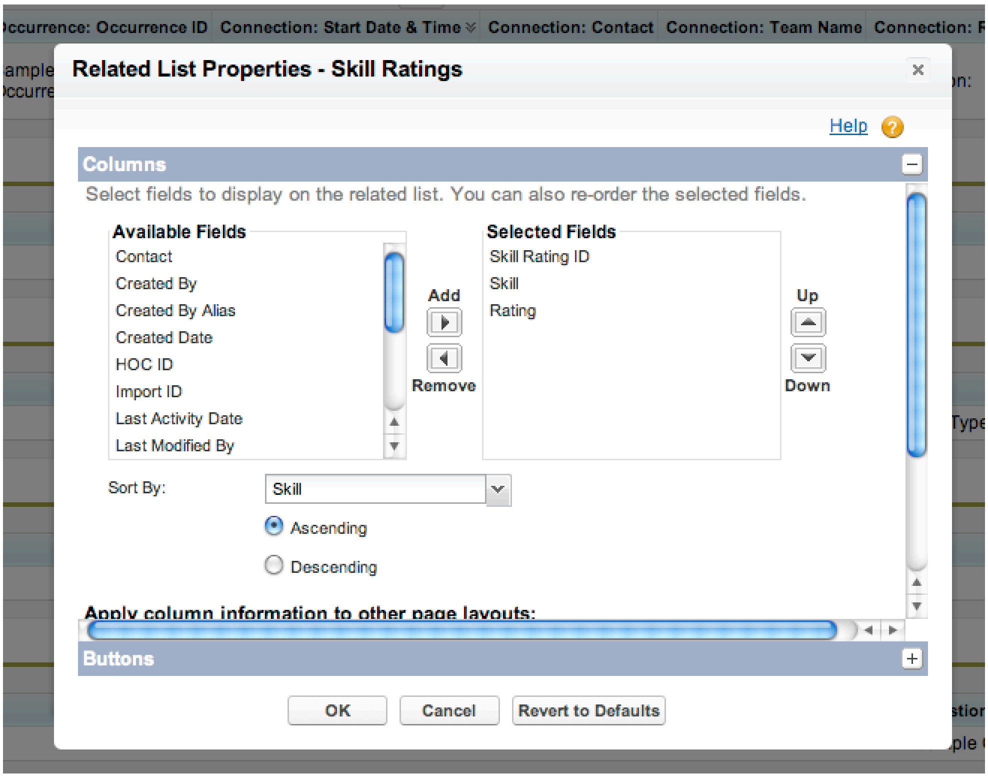
Click on the "Related Lists" item in the sidebar, and you can see the available related lists. You can drag additional ones to the page layout and place them wherever you like.

1. You can drag a related list by its 'handle' and move its location anywhere in the layout. (Thereby changing the order the related lists appear in)

2. You can click on the X and remove the list from the layout. (Or drag it back into the related list tray above)

3. You can click on the wrench to edit the lists properties

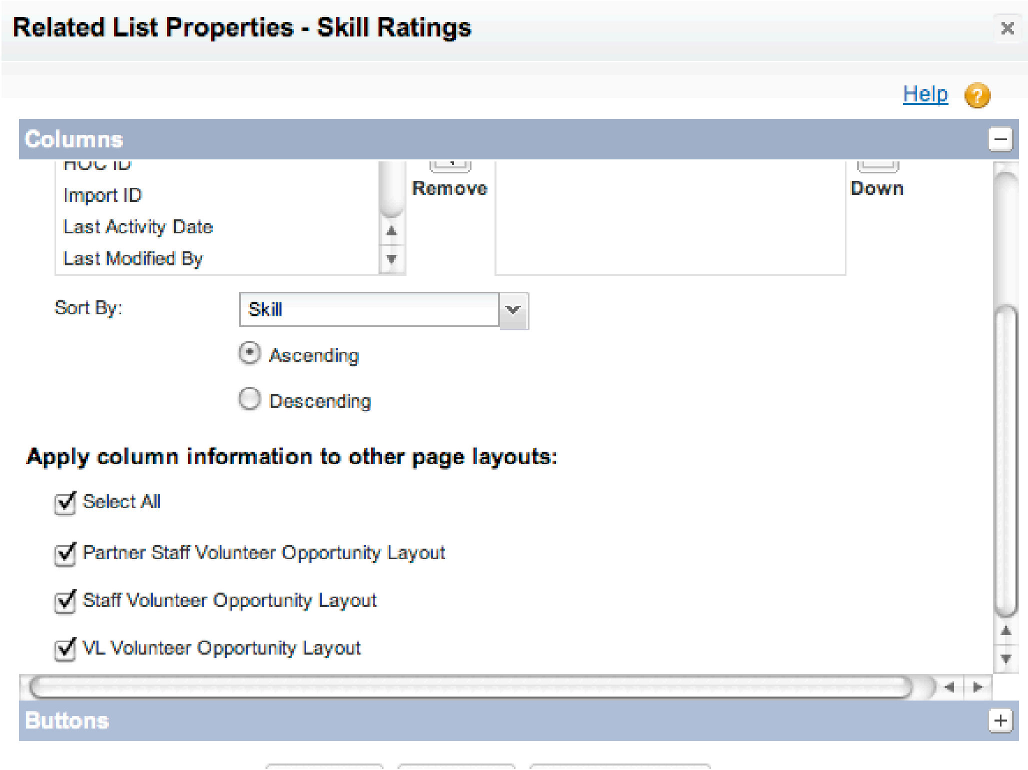
Editing a List's properties



You can choose which fields are available in the related list, and the order they appear in.

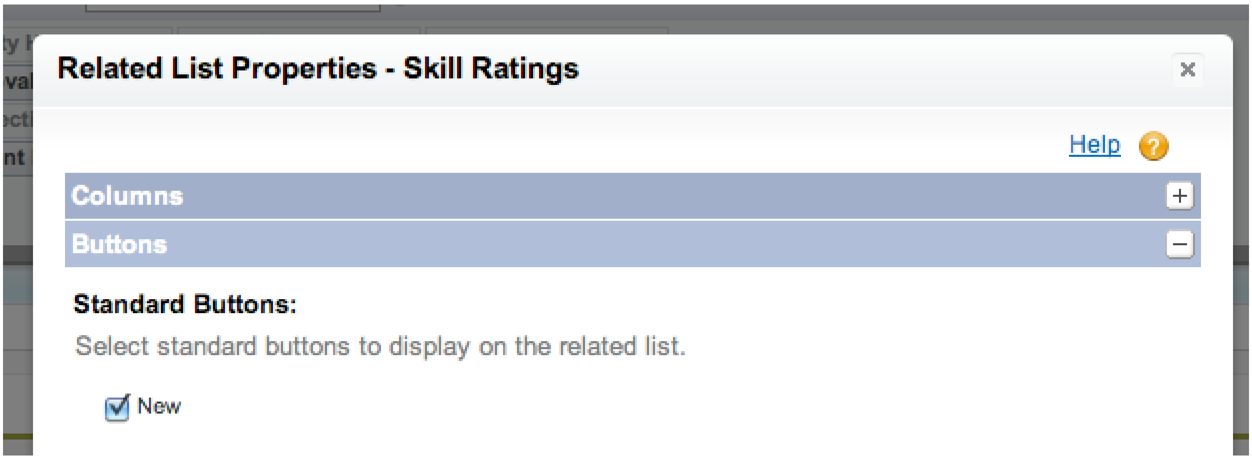
You can set the order that they are sorted by.

Keep in mind there is a limited amount of space in the related list -- so don't cram in too many fields!



You can speed up entry by applying the related list properties to all the layouts at once!

You can control the buttons that appear on the related list

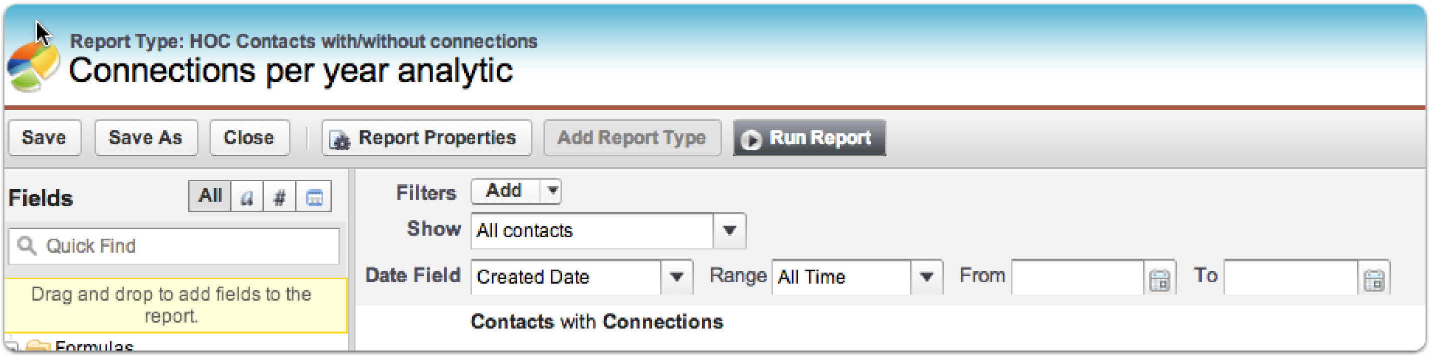


Adding charts to page layouts

In its Winter '14 release - Salesforce has made it possible to embed charts into a page layout. These charts can display useful overview data to give you visual information about a record you are viewing.

Charts can be added to page layout in any object... but let's show an example of creating a chart to embed in the contact record:

First: Create a report that summarizes data in a useful way and create a chart in that report:



Here we've created a report called "Connections per year analytics: My goal is to get a count of how many connections per year each volunteer has made, and also track the # of confirmed hours of service in each year. We create the report to show ALL contacts. (We will filter the report results within the page layout itself!)

Report Type -= HOC Contacts with/without connections. (Because I want to embed this report on the contact page layout.)

Filters: All contacts... for All Time.

Additional Filter: Added a cross filter to only show contacts that are WITH Connections. (This way I don't get any results for contacts that have no connections). They won't have anything that would show up in the chart anyway :-)

We used the following fields in my report, and grouped as follows:

Fields:

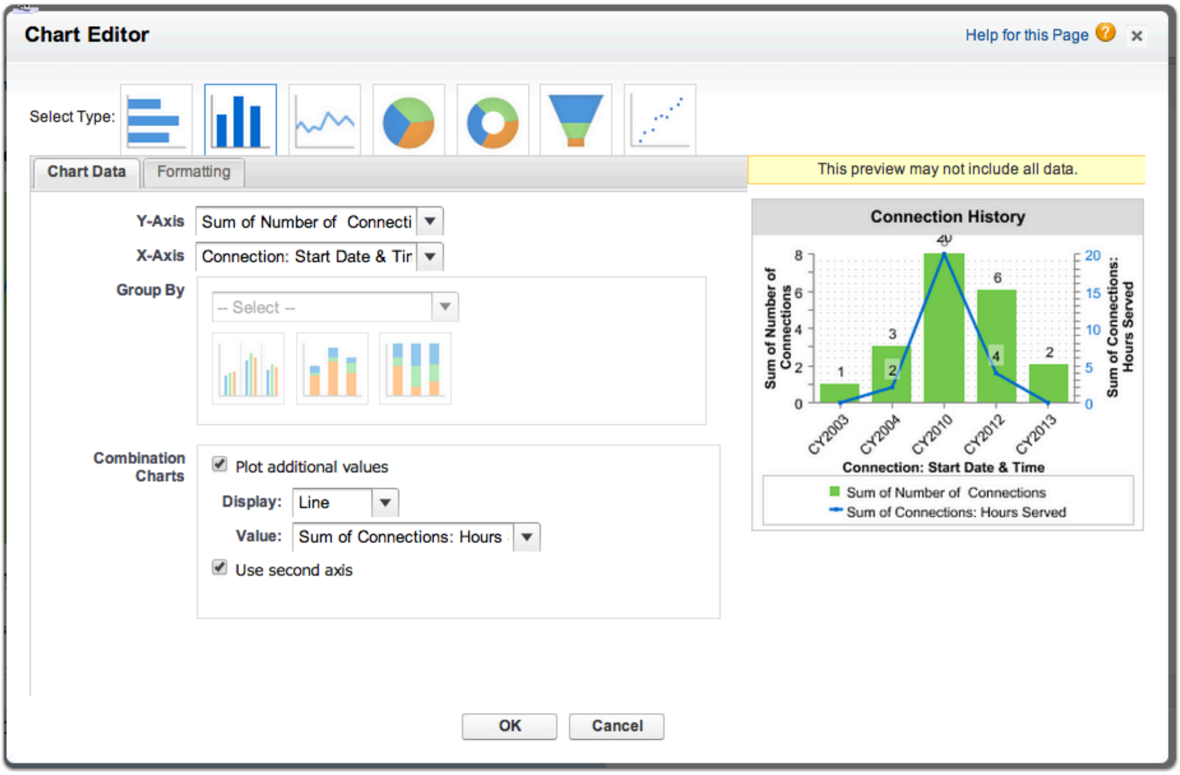
Full name
Connection ID
Number of Connections: (and I summarized on this field to give me the sum of the connections)
Hours Served: (and I summarize on this field to give me the sum of the hours)

Group on the following field:

Start Date & Time (and I grouped this field by Calendar Year)

Note: If you need help creating reports, please see the documentation on [customizing and managing reports].

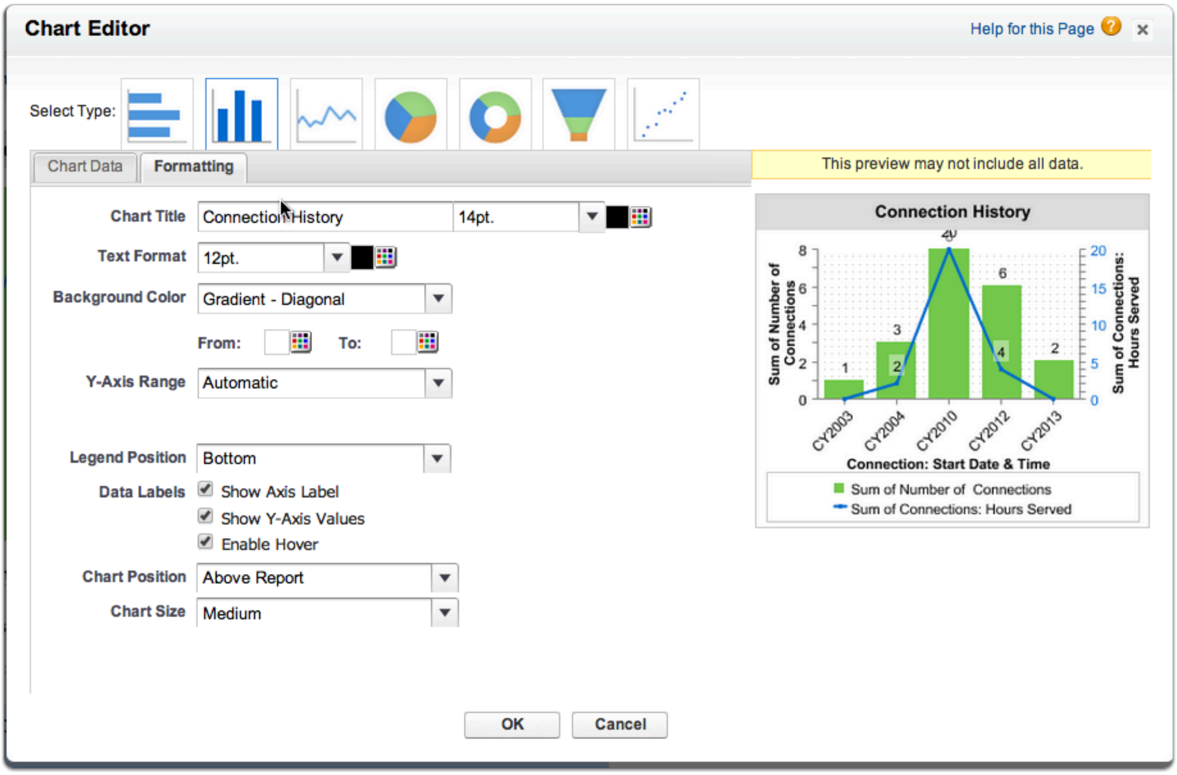
Add a chart to the report:



We've chosen to make this chart a bit complex. but you can make the chart as simple or complex as you like - based on what you want to display.

The Y-axis displays the sum of the number of connections. The X- Axis has the Start Date & Time of the connections (grouped by year). I've also chosen to make it a combination chart so that I can display the Sum of Connections: Hours Served. in the same chart.

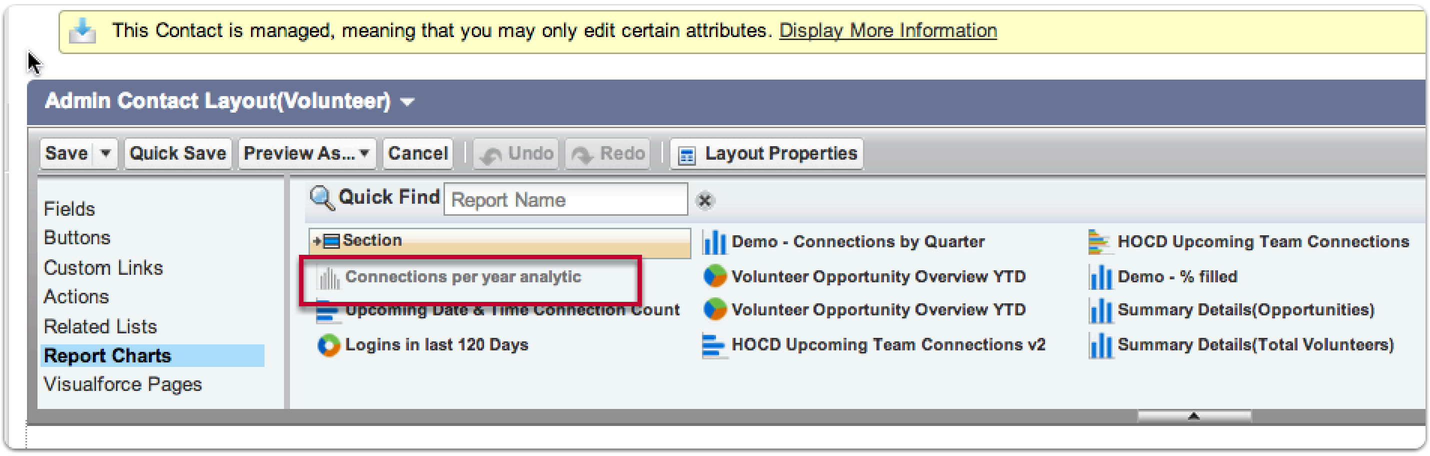
Formatting for this chart:



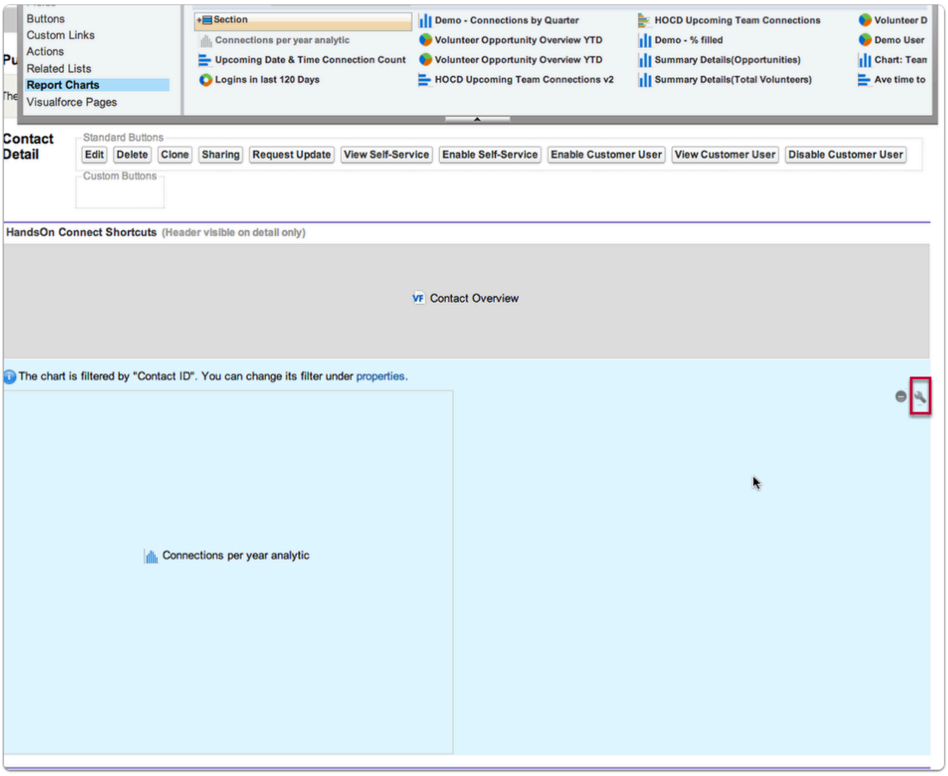
Save your finished report, and place in a folder that is accessible to the profiles you will want to be able to see this report and its chart.

(Note: If you add this to a page layout for partners or volunteer leaders, make sure they have access to the report folder, and the objects and fields used in your report)

Now we edit the page layout for Contacts to add the chart to the page layout:

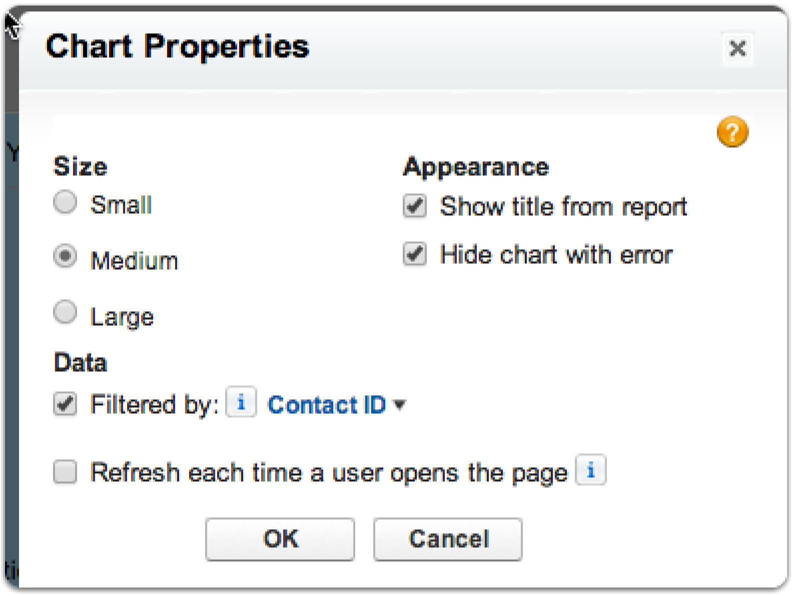


Click on "Report Charts" in the page layout selector - and select the chart you wish to add to the page layout. Then drag the report onto the layout wherever you want it to appear. (You can create a new section for it, or place it right below the HandsOn Connect Shortcuts 'contact overview' component).)



Click on the wrench on the upper right to set the chart properties

Set the properties for the chart



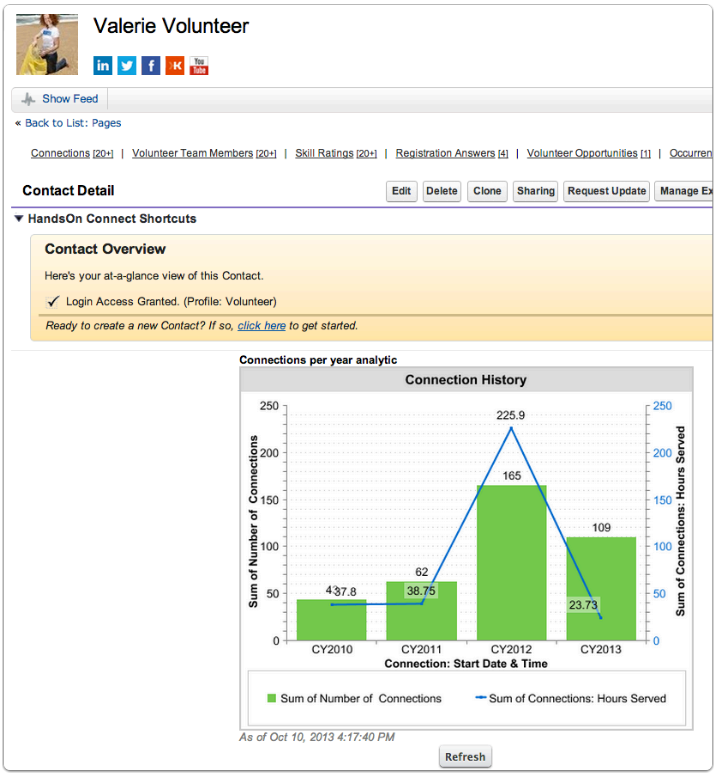
You can set the size and appearance of the chart.

To get the data for just one record, choose to filter the report by the ID of the object (in this case, the contact ID). This way, we'll only see the connections for the contact record we're viewing.

It's not recommended that you check 'refresh each time a user opens the page' as this will greatly slow down the loading of the page. It will automatically refresh every 24 hours - and there will be an option to refresh it after the page loads if you want the latest data.

Save the page layout with this new component.

The chart as it appears in the contact record page layout



The chart shows us both the number of connections Valerie has made each year, as well as the number of hours served.

If you set 'hovers' as active - then hovers will show up in the page layout just as they do in the report itself or in a dashboard. Clicking on the chart in the record will take you directly to the report, filtered on that contact.

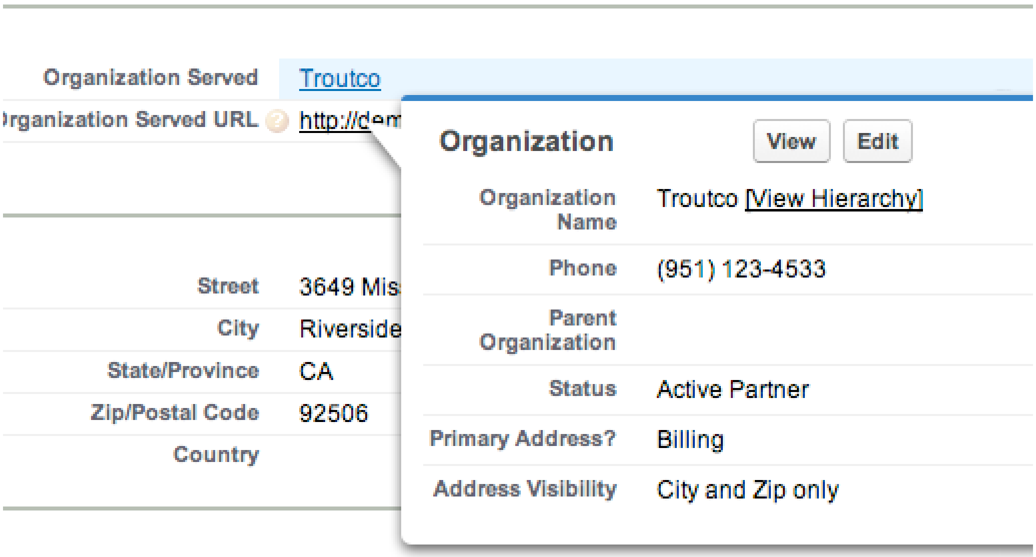
Video:

(Advanced) Editing the Hover List Layout

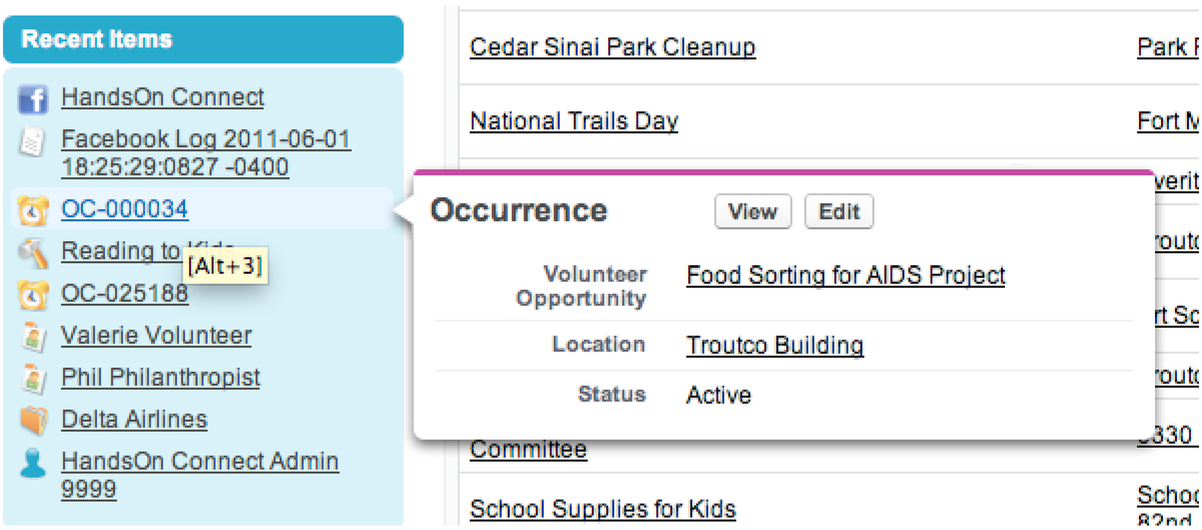
Hover views show up when you 'hover' over fields in layouts or in the sidebar.

They show a mini-view of fields in the related record.

Hover view of a field in a record

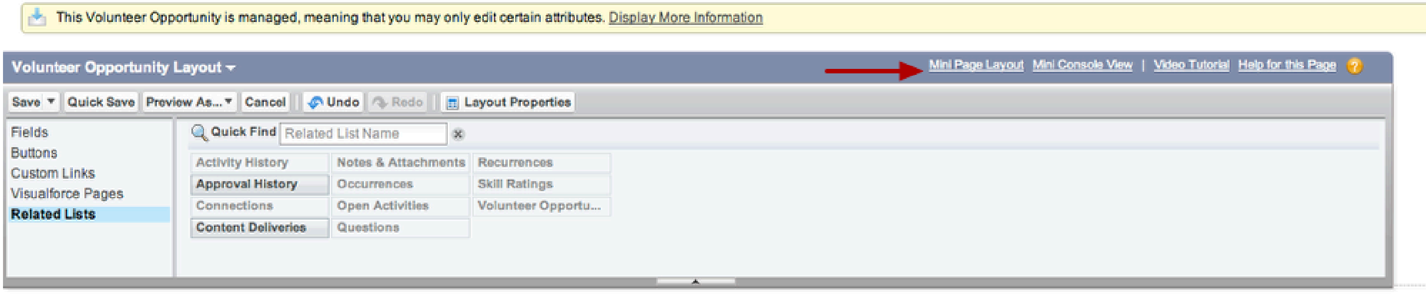


Hover view of recent items in the left sidebar

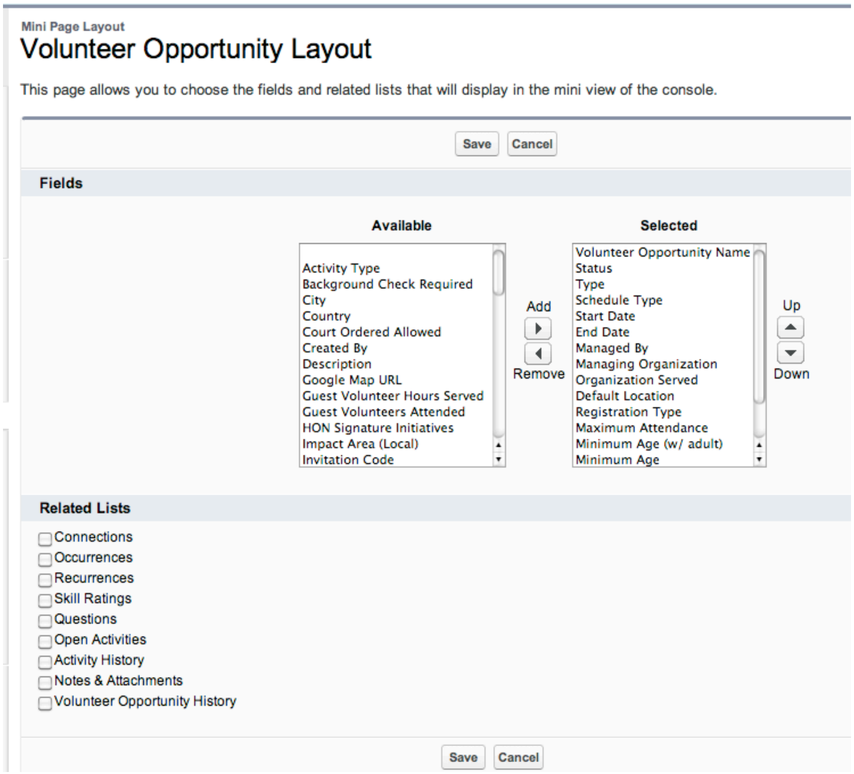


To edit the fields that appear in the hover view -- click on

"Mini Page Layout" in the page layout bar



Here you can control which fields show up in the 'hover view'



Select the fields you want to appear, as well as related lists. Keep in mind that this is a mini-view and too many fields will make it necessary to scroll.

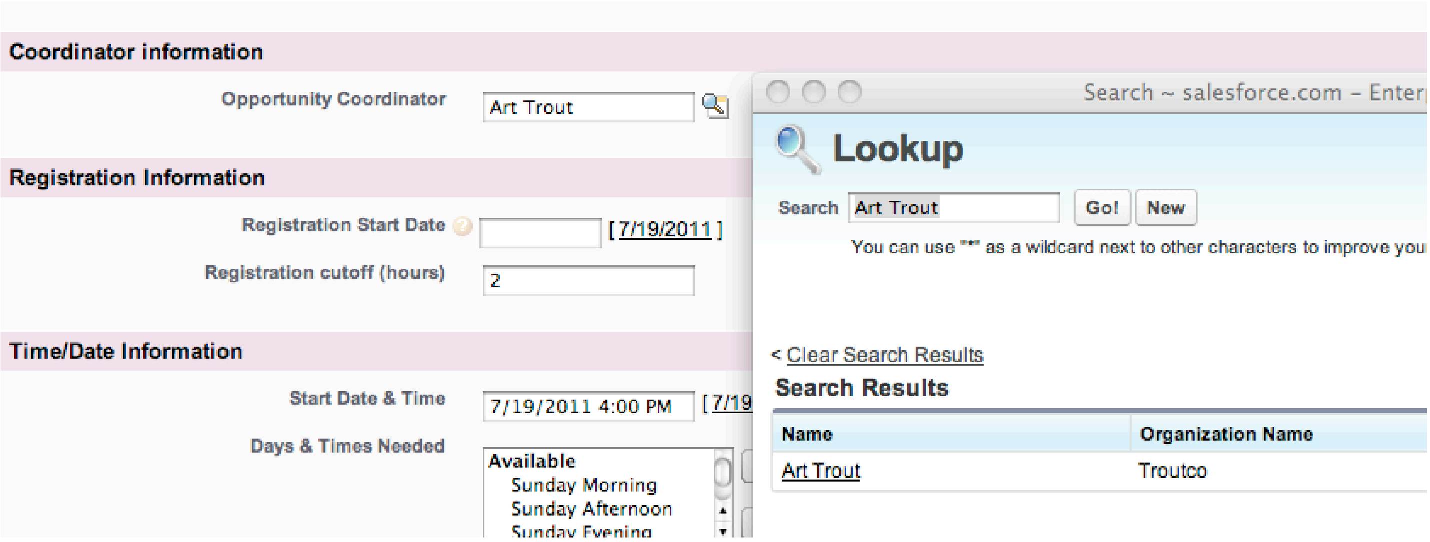
The goal should be to get essential information visible.

(Advanced) Editing the fields that appear when doing a 'lookup'

When you search for a field using the magnifying glass icon in a lookup field -- certain fields from that record appear.

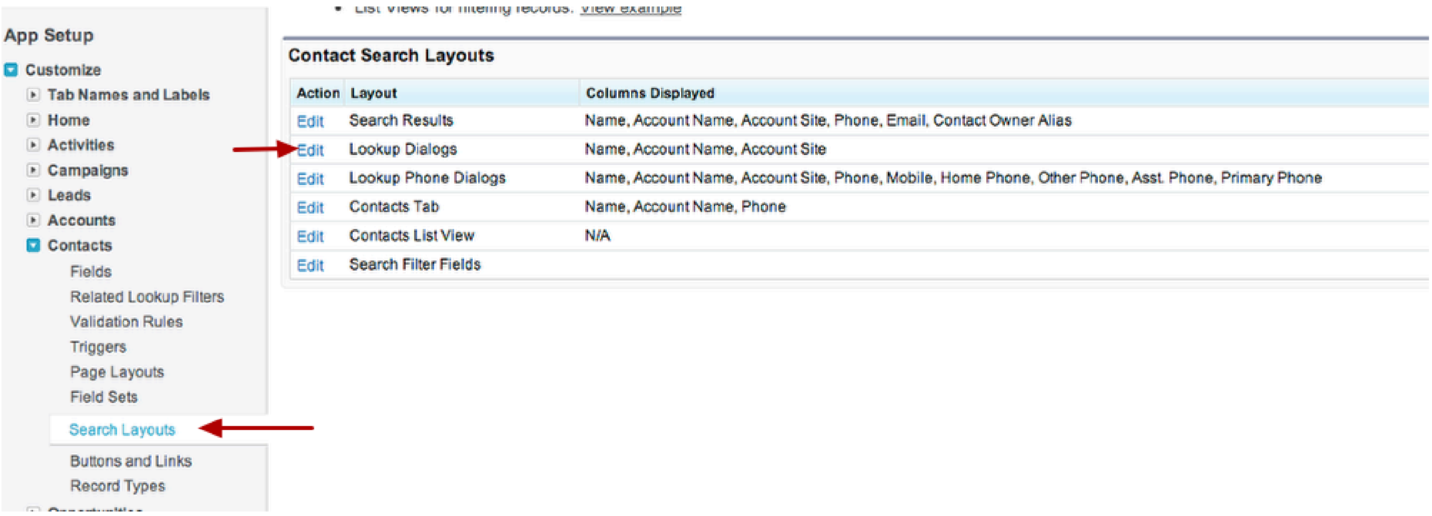
You can edit which fields appear to make lookups more useful.

Here is the lookup window that pops up when I search for the Opportunity Coordinator Field in the occurrence record



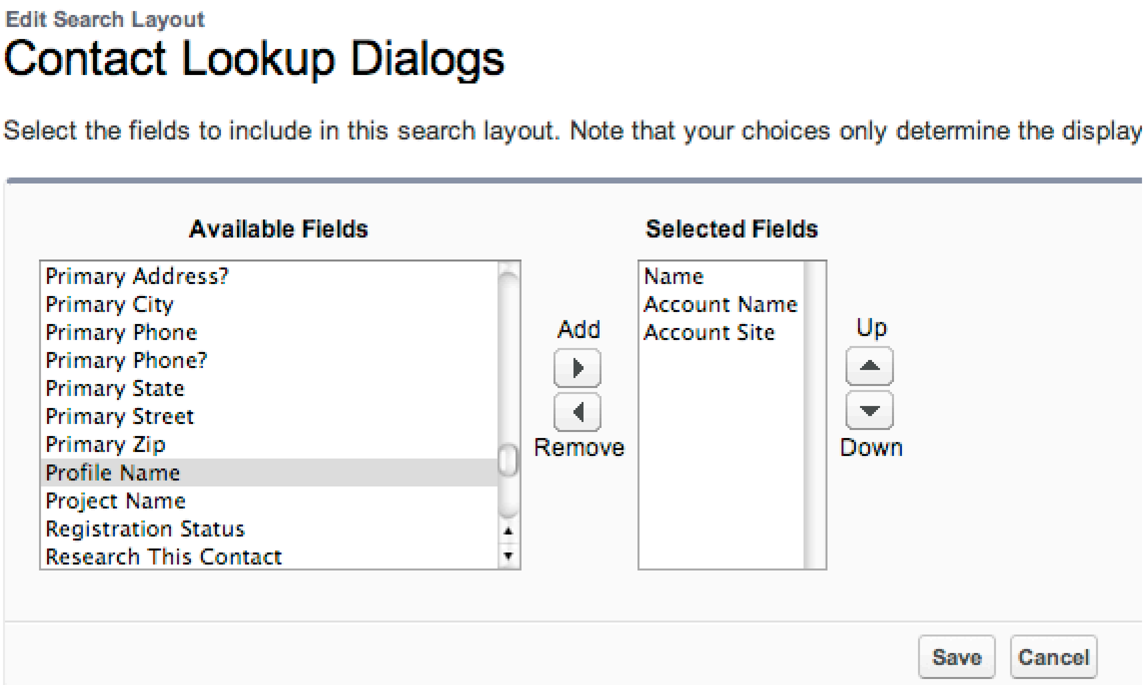
This is a lookup of a contact record

If I want more info to appear I need to edit the Search Layout for Lookup Dialogs for the Contact Record



Go to **Setup / App Setup / Customize / Contacts / Search Layouts** and click on the edit link for the "Lookup Dialogs"

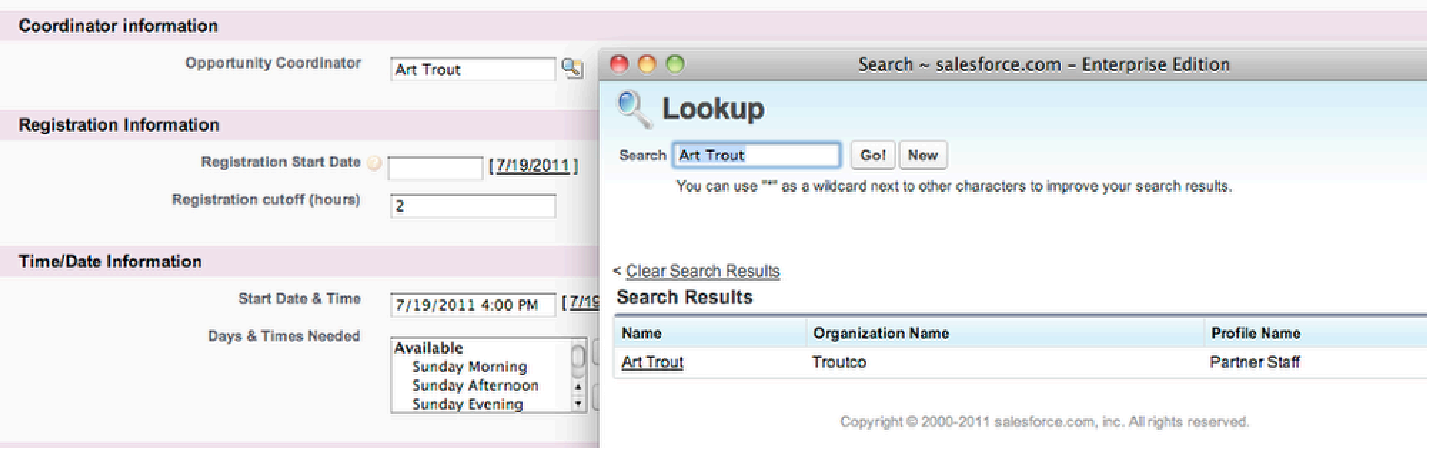
Add the fields you wish to appear from the available fields section



So for example, if I wish to see profile name - I can add it to the selected fields.

Click Save

After adding profile name - when I do the lookup I see this!

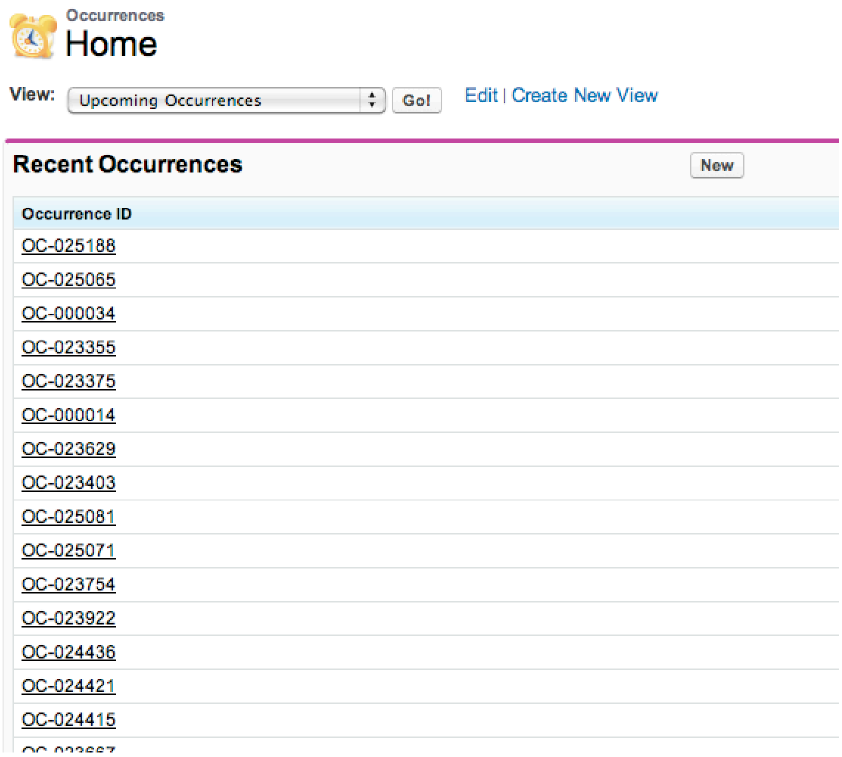


This comes in very handy in seeing whether or not an Opportunity Coordinator is a Volunteer Leader for example.

(Advanced) Editing the default view of "Recent" on the Home Pages of objects

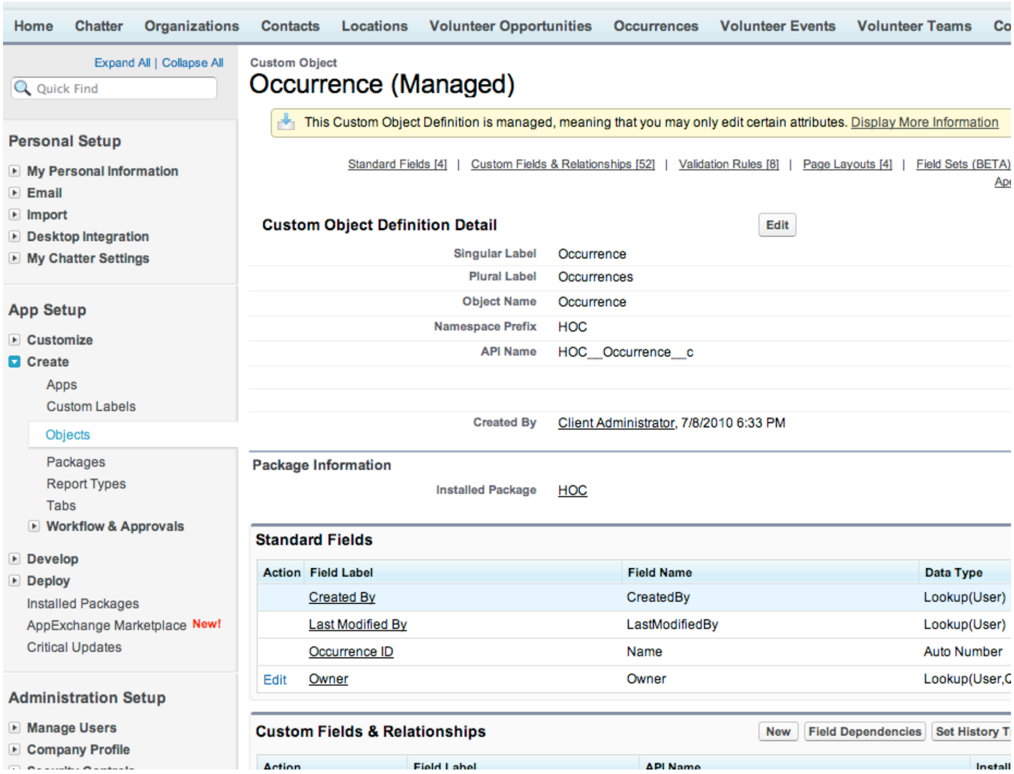
When you click on a tab - you always arrive in the "Recent" view on the homepage of an object. What fields appear in the recent view can be edited!

Occurrence Object's recent view shows just the Occurrence ID



This isn't terribly useful :-(

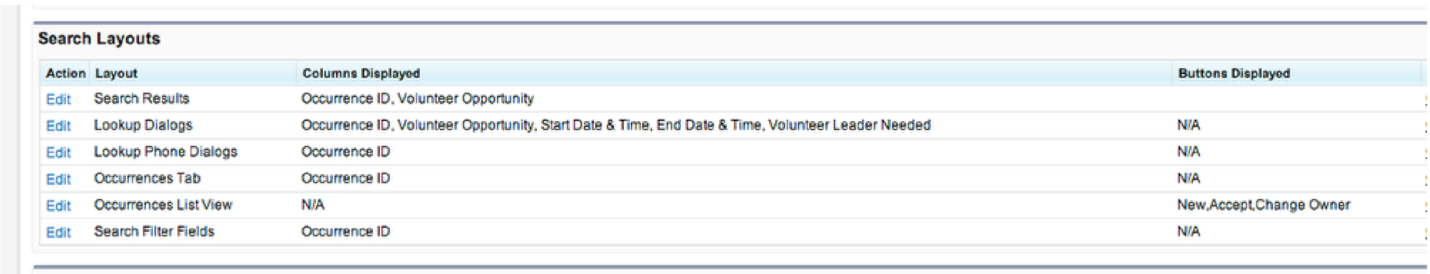
To Edit what appears here we need to edit one of the object's search layouts



Since this is a custom object we need to go to **Setup / App Setup / Create / Objects /** and choose the **Occurrence** object.

Scroll down the custom object page to get to the **Search Layouts** section

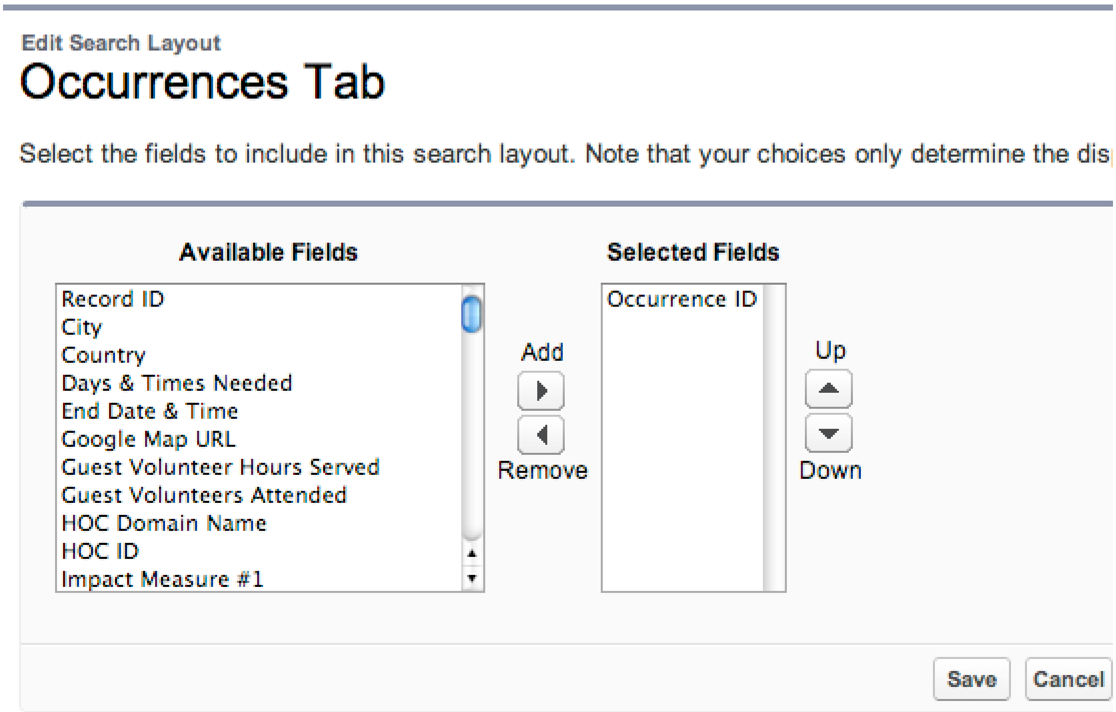
Edit the Occurrence Tab search layout.



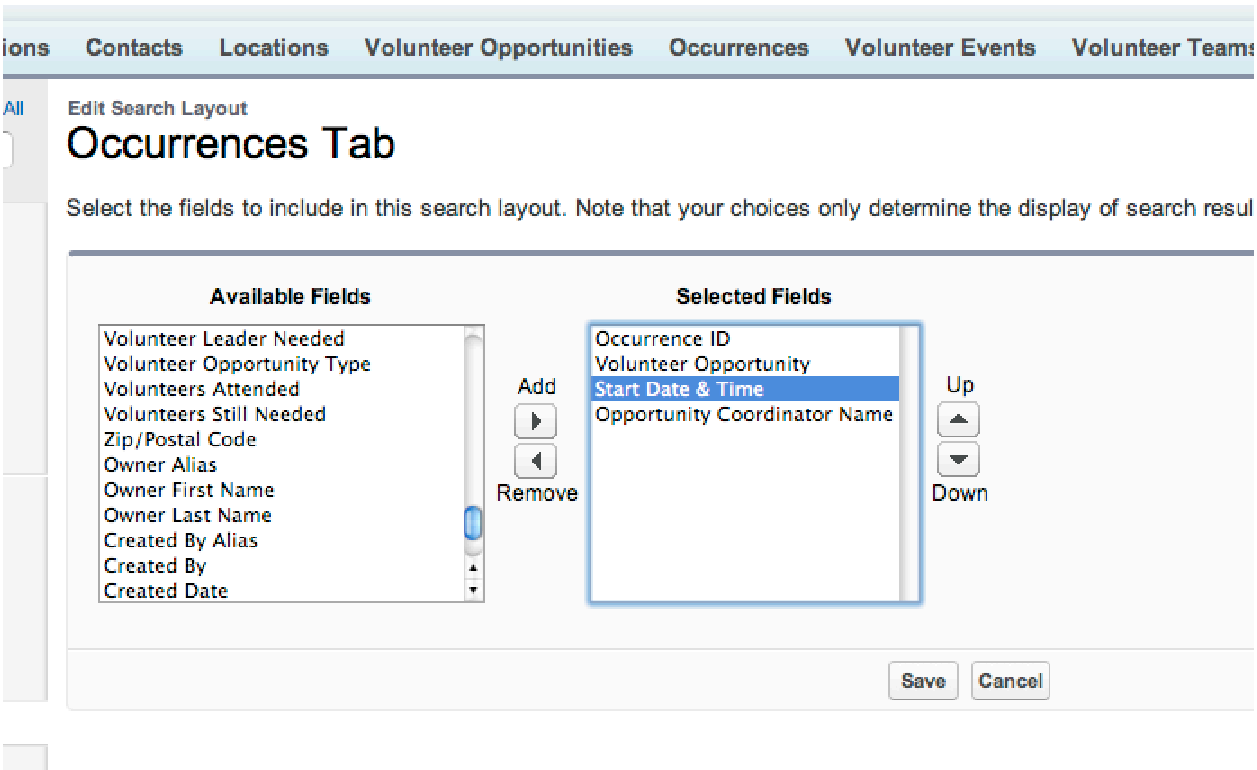
Search Layouts

Action	Layout	Columns Displayed	Buttons Displayed
Edit	Search Results	Occurrence ID, Volunteer Opportunity	
Edit	Lookup Dialogs	Occurrence ID, Volunteer Opportunity, Start Date & Time, End Date & Time, Volunteer Leader Needed	N/A
Edit	Lookup Phone Dialogs	Occurrence ID	N/A
Edit	Occurrences Tab	Occurrence ID	N/A
Edit	Occurrences List View	N/A	New,Accept,Change Owner
Edit	Search Filter Fields	Occurrence ID	N/A

We can see the only field available is Occurrence ID

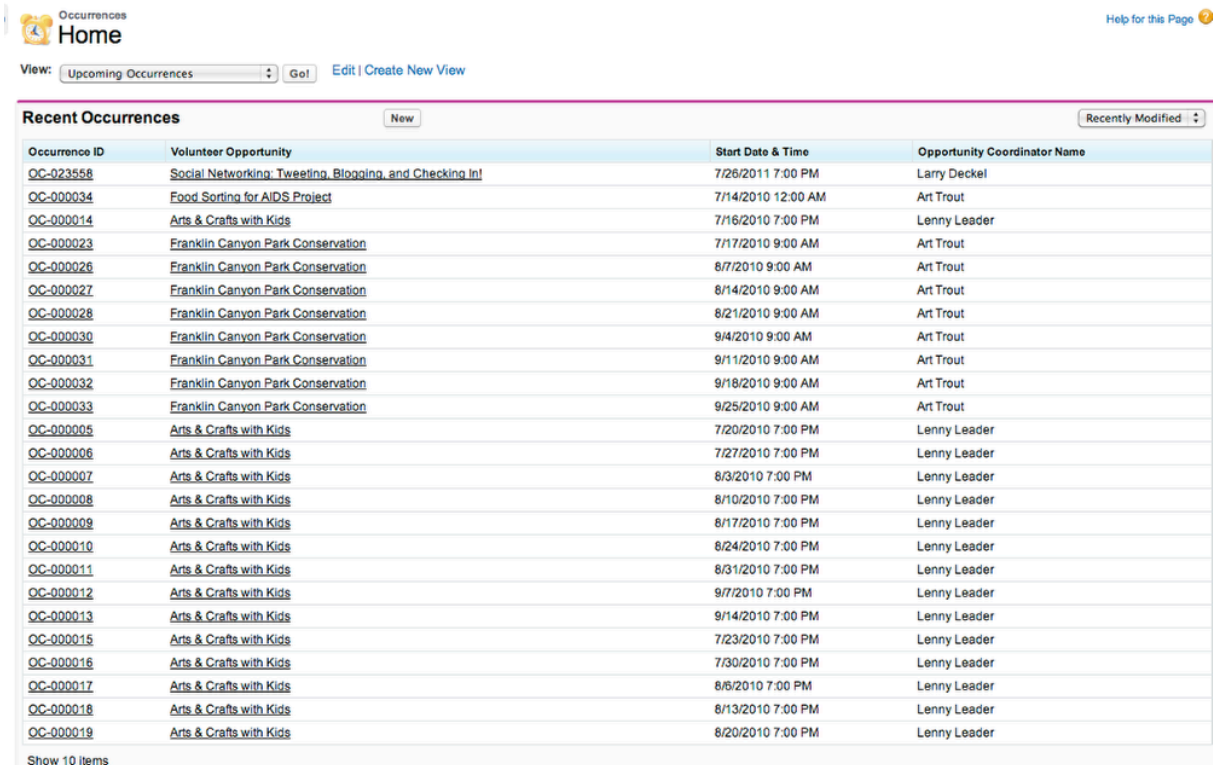


Add some other useful fields



Just as you can with [views you create for the object](), you can choose the fields that appear when you arrive on the home page.

You've now got a more useful view!


Occurrences
Home
Help for this Page
View: Upcoming Occurrences Go! Edit | Create New View

Recent Occurrences New Recently Modified

Occurrence ID	Volunteer Opportunity	Start Date & Time	Opportunity Coordinator Name
OC-023558	Social Networking: Tweeting, Blogging, and Checking In!	7/26/2011 7:00 PM	Larry Deckel
OC-000034	Food Sorting for AIDS Project	7/14/2010 12:00 AM	Art Trout
OC-000014	Arts & Crafts with Kids	7/16/2010 7:00 PM	Lenny Leader
OC-000023	Franklin Canyon Park Conservation	7/17/2010 9:00 AM	Art Trout
OC-000026	Franklin Canyon Park Conservation	8/7/2010 9:00 AM	Art Trout
OC-000027	Franklin Canyon Park Conservation	8/14/2010 9:00 AM	Art Trout
OC-000028	Franklin Canyon Park Conservation	8/21/2010 9:00 AM	Art Trout
OC-000030	Franklin Canyon Park Conservation	9/4/2010 9:00 AM	Art Trout
OC-000031	Franklin Canyon Park Conservation	9/11/2010 9:00 AM	Art Trout
OC-000032	Franklin Canyon Park Conservation	9/18/2010 9:00 AM	Art Trout
OC-000033	Franklin Canyon Park Conservation	9/25/2010 9:00 AM	Art Trout
OC-000005	Arts & Crafts with Kids	7/20/2010 7:00 PM	Lenny Leader
OC-000006	Arts & Crafts with Kids	7/27/2010 7:00 PM	Lenny Leader
OC-000007	Arts & Crafts with Kids	8/3/2010 7:00 PM	Lenny Leader
OC-000008	Arts & Crafts with Kids	8/10/2010 7:00 PM	Lenny Leader
OC-000009	Arts & Crafts with Kids	8/17/2010 7:00 PM	Lenny Leader
OC-000010	Arts & Crafts with Kids	8/24/2010 7:00 PM	Lenny Leader
OC-000011	Arts & Crafts with Kids	8/31/2010 7:00 PM	Lenny Leader
OC-000012	Arts & Crafts with Kids	9/7/2010 7:00 PM	Lenny Leader
OC-000013	Arts & Crafts with Kids	9/14/2010 7:00 PM	Lenny Leader
OC-000015	Arts & Crafts with Kids	7/23/2010 7:00 PM	Lenny Leader
OC-000016	Arts & Crafts with Kids	7/30/2010 7:00 PM	Lenny Leader
OC-000017	Arts & Crafts with Kids	8/6/2010 7:00 PM	Lenny Leader
OC-000018	Arts & Crafts with Kids	8/13/2010 7:00 PM	Lenny Leader
OC-000019	Arts & Crafts with Kids	8/20/2010 7:00 PM	Lenny Leader

Show 10 items

Working with Workflows and Processes

Workflows, Flows and Processes - what's the difference?

Many of the automations build into HandsOn Connect were created using workflows. With the advent of Salesforce Lightning however, Process Builders is the newer way to automate actions in Salesforce.

Learn about workflows to learn how to manage existing HOC workflows. But if you're going to create a new workflow - consider creating a Process instead.

If you've had HandsOn Connect customized for you to create new automations - its quite likely they were created using Processes instead of Workflows.

Salesforce has three automation tools

Workflows - This is the long-running automation tool in Salesforce. Much of the automation in HandsOn Connect was built by using workflows. Read further in this chapter to learn about working with workflows, and the many workflows that are part of HandsOn COnnect.

Processes - Processes are built using "Process Builder" - and have largely replaced workflows as the easiest and most powerful way to create automations in Salesforce. We recommend learning about Process Builder and using it, rather than workflows, to create new automations in your HandsOn Connect instance.

Flows: Flows are even more powerful than Processes but requiring a greater amount of progammng knowledge. They are built using Cloud Flow Designer and have a relatively steep learning curve. They allow for user interaction and can handle complex looping processes.

To learn more about which automation tool to use, see this article in Salesforce Help.

To learn more about Processes and Flows — see this training module in Trailhead:

Lightning Flow

Workflow Overview

Workflows are a way to automate processes instead of doing them administratively and manually.   Workflows simplify the management of redundant processes. bringing great programming power to HandsOn Connect.

Lots of Workflows are built into HandsOn Connect to manage all the systems automated emails – and tasks that are assigned to Opportunity Approval Manager and Organization Approval Mgr, etc.

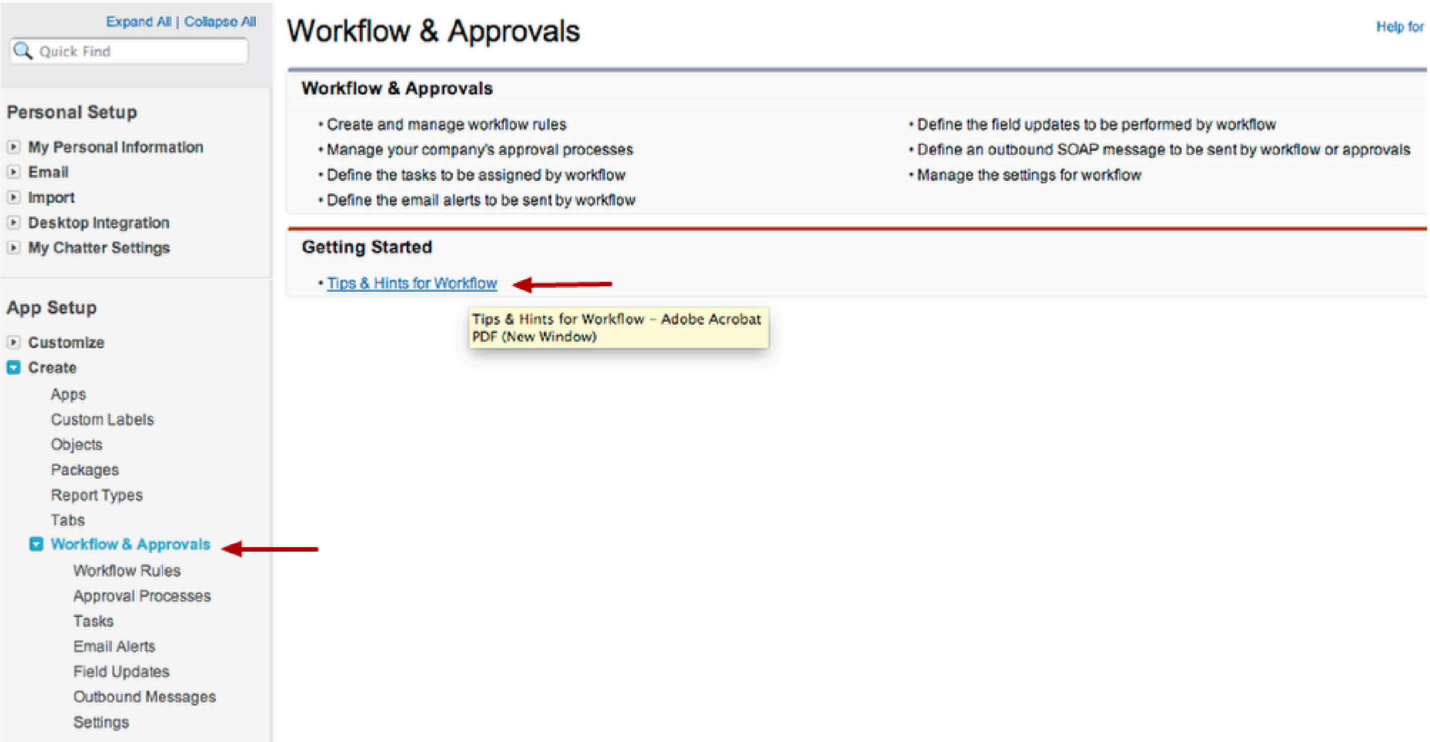
So if you get the hang of workflows, there's all sorts of things you can do! Use workflows to help manage your internal business processes (like adding the restriction "Orientation Required" or "Background Check Required" whenever you create an affiliate-managed project.

There's a nice video overview of creating workflow rules available in Salesforce: https://na7.salesforce.com/workflow/tutorial/creatingworkflowrule.htm

Many of the automations build into HandsOn Connect were created using workflows. With the advent of Salesforce Lightning however, Process Builders is the newer way to automate actions in Salesforce.

Learn about workflows to learn how to manage existing HOC workflows. But if you're going to create a new workflow - consider creating a Process instead.

The help screen you see when you first click on Setup / Create / Workflow & Approvals has hyperlinks that give lots of useful information on working with workflows!



Workflow Rules and Workflow Actions

Workflow Rules determine the criteria under which a workflow is carried out. It is the **IF** for whether the rule is or isn't run.

Wortkflow Actions are the **WHAT** happens if the criteria are met.

Workflows can automate the following types of workflow actions:

- Managing complex business Approval Processes
- Sending Outbound Messages through APIs.
- Creating Tasks
- Sending Email Alerts
- Updating Fields

Workflow Actions can happen either **immediately** or based upon a **Time Dependency**

A **Workflow Rule** can be used to trigger one or multiple **workflow actions** as you wish, some of which may happen immediately, and some of which may happen later.

Creating a Workflow Rule and Action -- Example: Updating a field

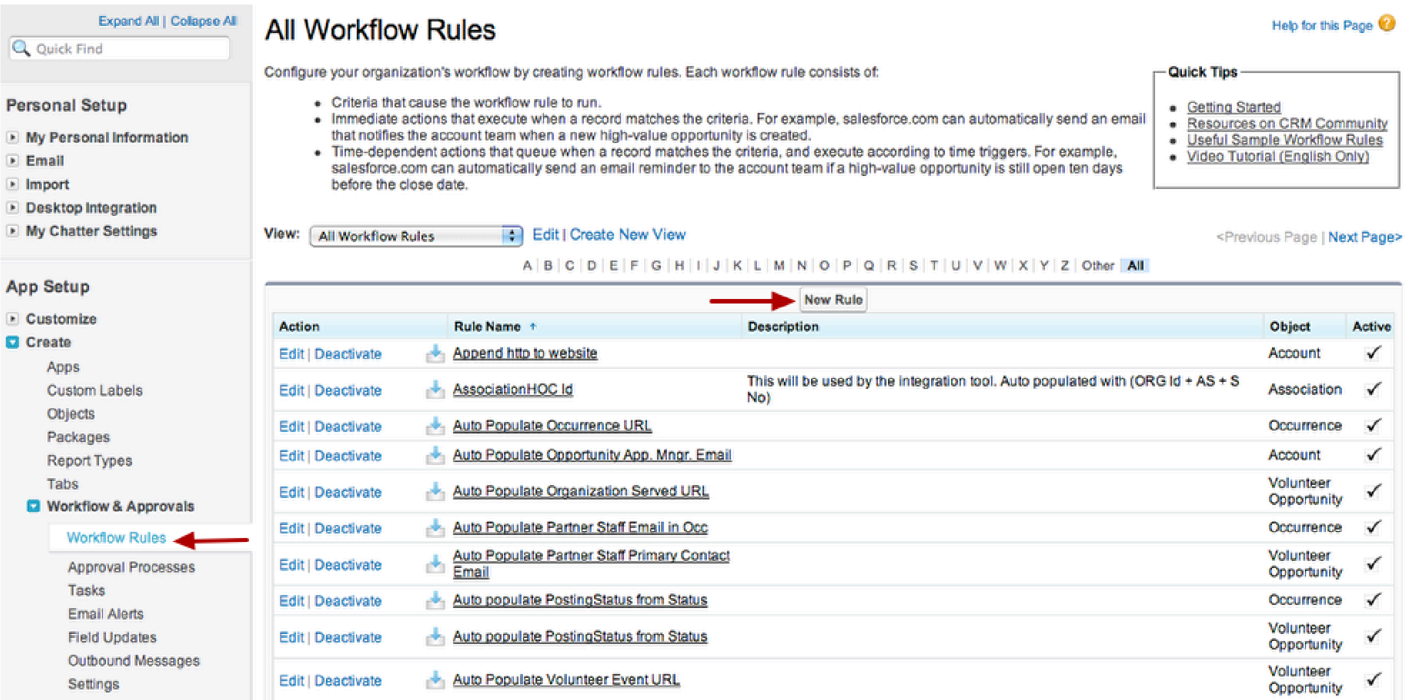
Lets create a workflow that will make the "Orientation Required" checkbox automatically checked whenever we create an affiliate-managed volunteer opportunity.

Doing this restricts volunteers who do not have the 'orientation required' checkbox marked in their contact record from signing up for an affiliate-managed project.

(We cannot set this as a default value because the "Orientation Required" checkbox is a managed field and cannot be altered at the field level).

Creating a Workflow rule for the first time will lead you through creating both the **Workflow Rule** and the **Workflow Action**

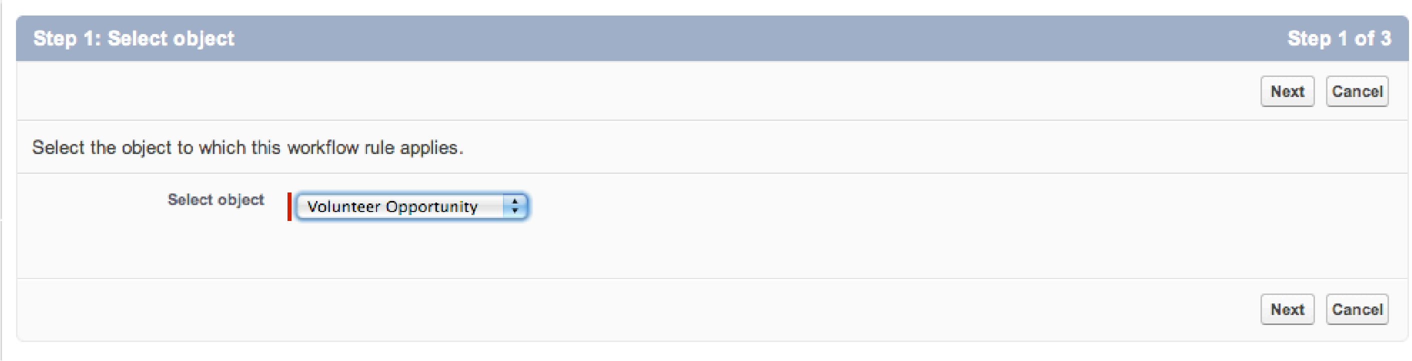
First: Create the Workflow Rule



Go to **Setup / App Setup / Create / Workflows & Approvals / Workflow Rules.** Click on **New Rule**

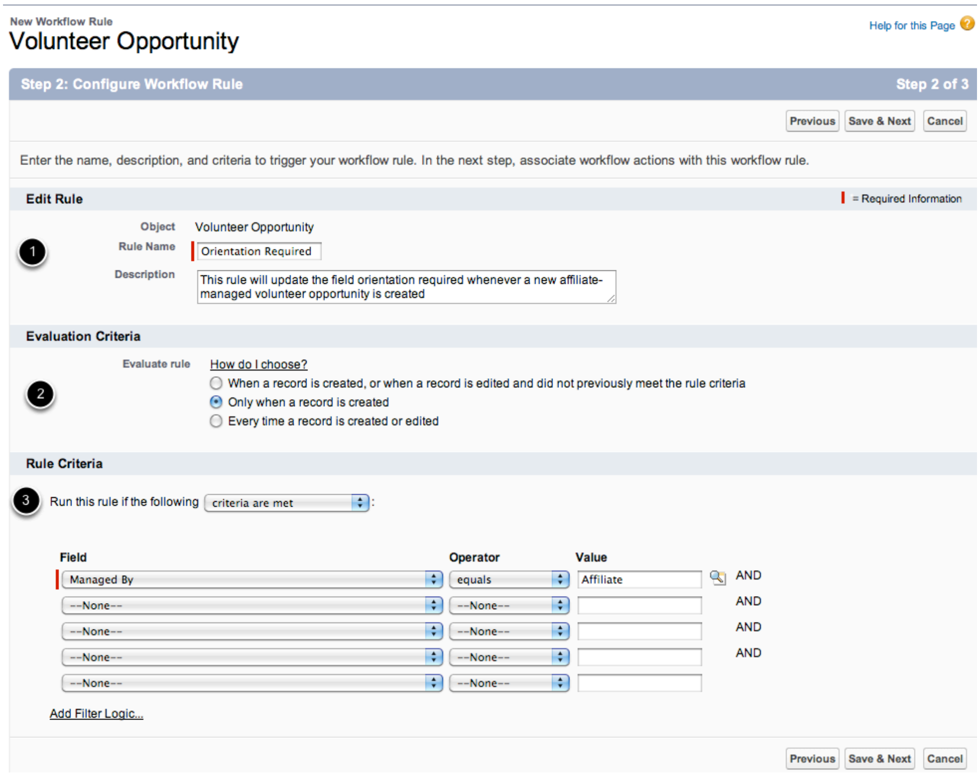
Step 1: Select the object you wish the rule to be associated

with



Since "Orientation Required" is a field in the Volunteer Opportunity record - we choose it.

Step 2: Configure the Workflow Rule



1. The rule is given a name

2. Evaluation Criteria determines the circumstances under which the rule is evaluated. Under what circumstances does this rule get evaluated?

- When a record is created, or when a record is edited and did not previously meet the rule criteria: Choose this option to include new records and updates to existing records, unless the rule just ran and still meets the rule criteria. The rule is not re-triggered on edits that do not affect rule criteria. For example, if setting an opportunity rating to “Hot” causes the rule to run, with this option, the rule will run again only if the rating changes, then changes back to “Hot”—no matter how many times you edit the object.

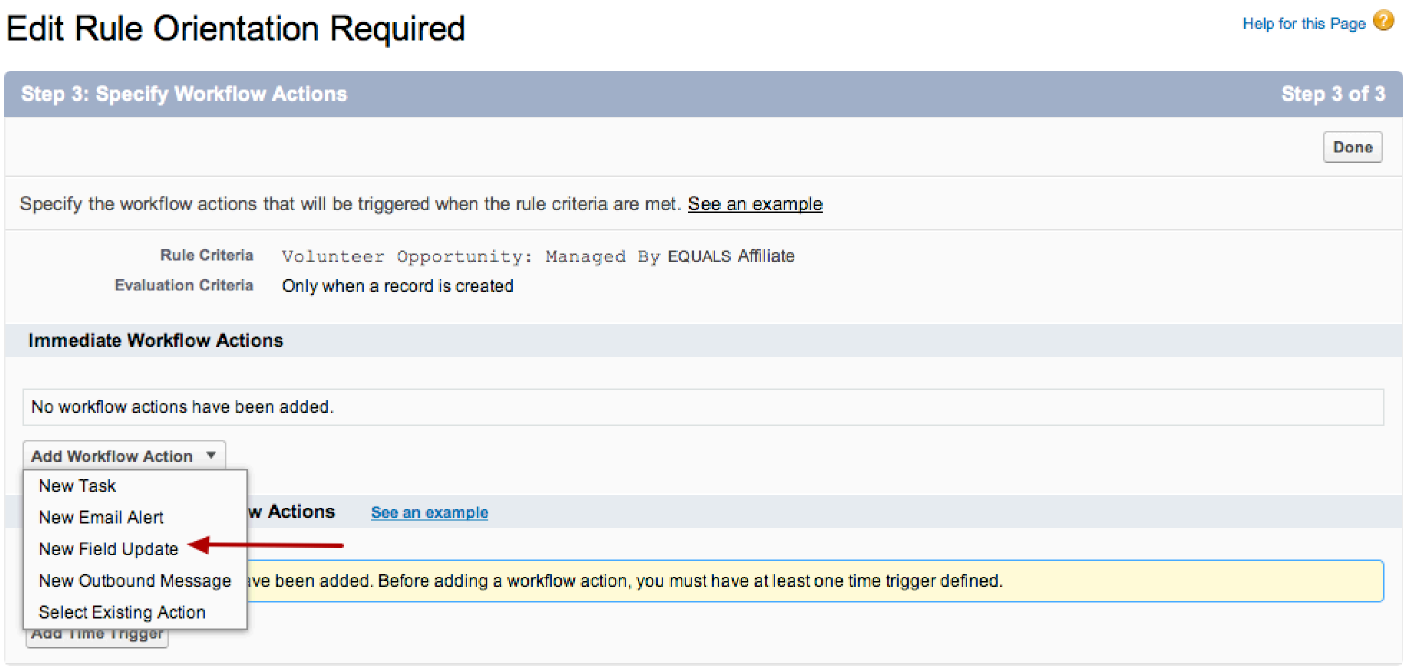
- Only when a record is created: Choose this option to ignore updates to existing records.
- Every time a record is created or edited: Choose this option to include new records and updates to existing records and repeatedly trigger the rule, even if the record still meets the criteria. You cannot add time-dependent actions to the rule if you choose Every time a record is created or edited.

We don't want this rule run EVERY TIME a record is touched, so we can either pick "When a Record is Created".

3. The Rule Criteria determines the field criteria under which the rule will run.

- In this case, we only want this rule to run IF the opportunity is managed by the affiliate. (And not run for Partner Managed volunteer opportunities).

Step 3: Specify Workflow Actions

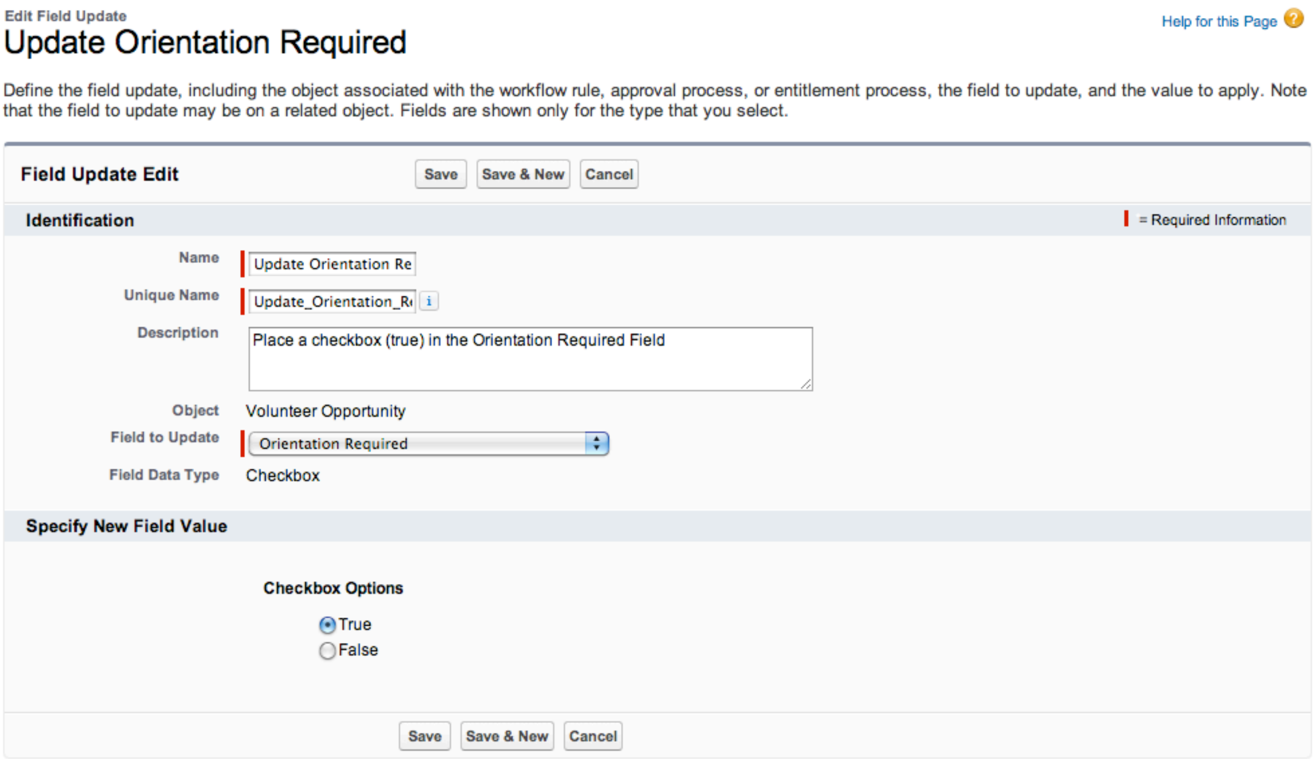


Now we say WHAT will happen when the rule meets the evaluation criteria:

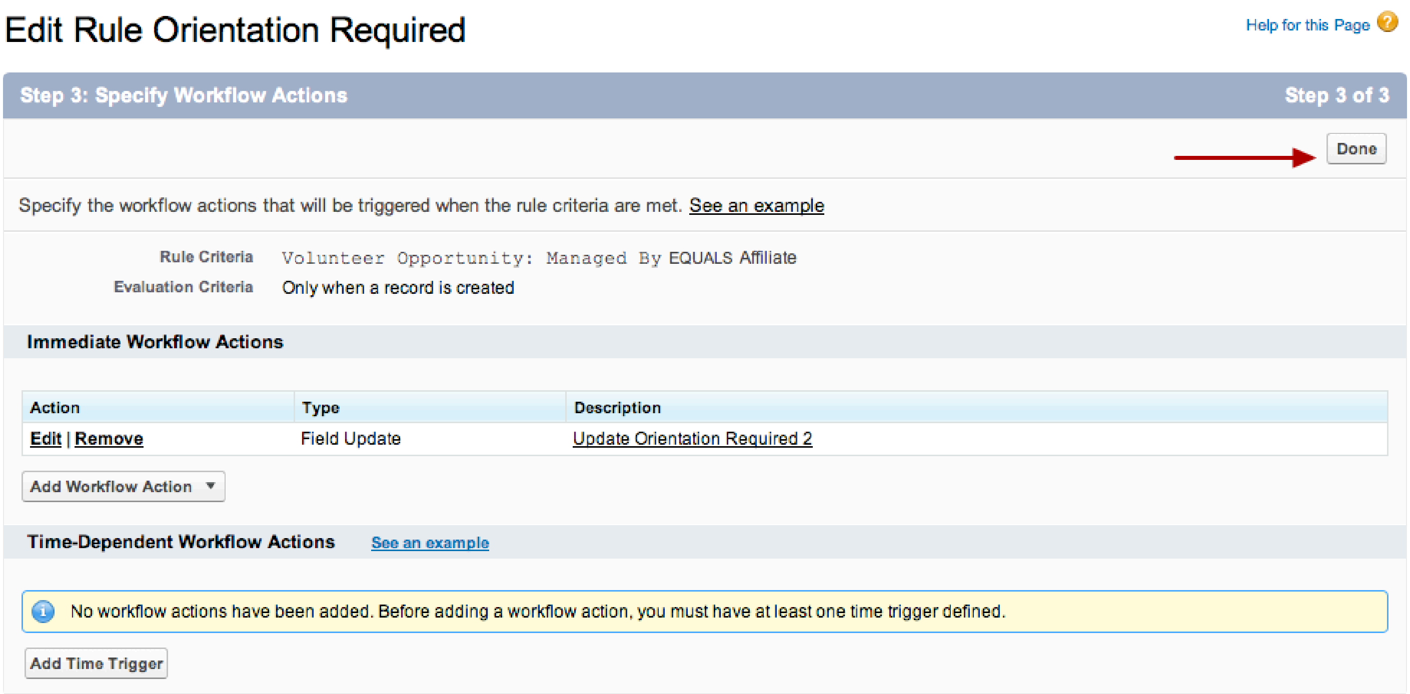
You can specify any of the types of workflow actions, or choose a workflow action you've previously created.

We'll choose "New Field Update" because we want to change the "orientation required' checkbox.

Now we define what field is updated and in what way



You can now add additional actions to take place if you wish



If we wanted other fields to be updated, or to create tasks or email alerts we could add additional workflow actions to take place when the Volunteer Opportunity Record is created. In this case we only want one field updated.

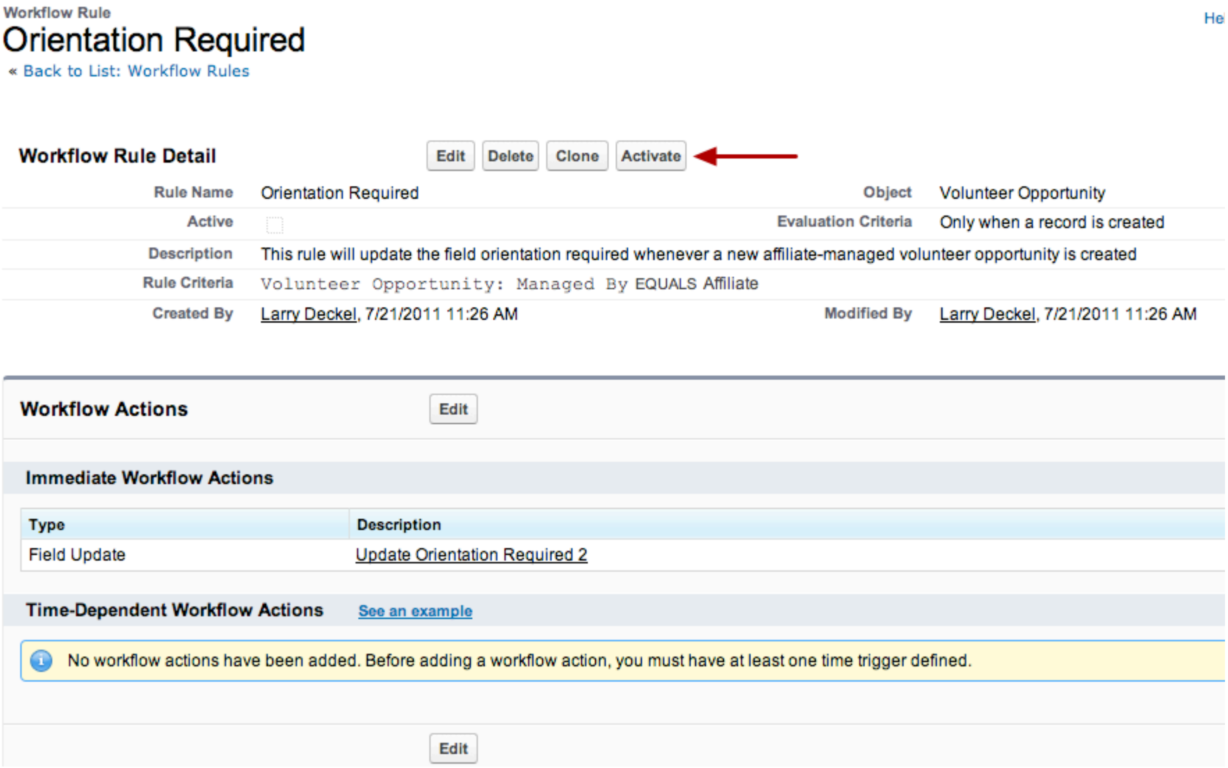
However, if for example we wanted the **Registration Cutoff (hours)**

By Default you create Workflow actions as **Immediate Workflow Actions.** They take place immediately.

You can optionally make workflow actions **Time-Dependent** by defining a Time Trigger (a later TIME for the action to take place).

In this case we are NOT making this time dependent so we can click **DONE.**

You must Activate the Workflow for it to be in effect



Don't forget to click the ACTIVATE button to put the rule into effect!

Now your rule is complete and active in your system! Any new affiliate-managed projects will automatically have the "Registration Required Checkbox" marked as True, which will restrict volunteers from signing up unless they've completed an orientation.

See the topic in Training 5 about how to create an online orientation for your volunteers to fully take advantage of this workflow.

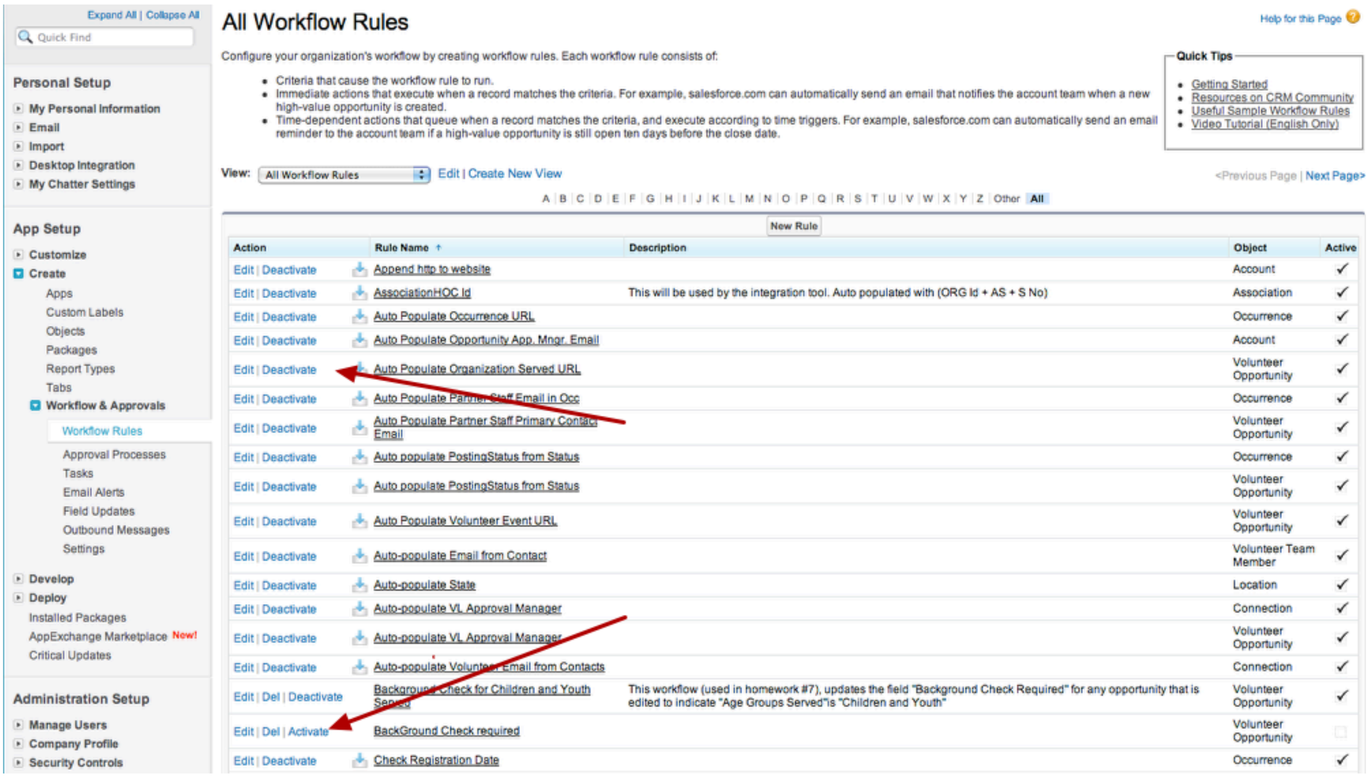
HandsOnConnect
Cloud Solutions

How to deactivate workflows

Automated workflows in HandsOn Connect send emails and assign tasks to the Partner Approval Manager and the default Opportunity Approval Manager, but you might want to disable either the emails or the tasks from being created.

Similarly, There may be automated emails the system sends that you'd like to suspend. Here's how to deactivate Workflows

All workflow actions are managed by Workflow Rules



Go to **Setup / App Setup / Create / Workflow & Approvals / Workflow Rules.**

Make sure you understand what will happen if you suspend a workflow (there may be multiple actions associated with it). If you click on the rule name itself - you can see what the rule does - and if it sends an email alert, creates a task, performs a field update, and the circumstances under which this occurs.

If you wish to suspend this workflow from executing. Click on the **Deactivate** Link.

To activate a workflow that is deactivated, click the activate link.

Editing a Workflow Action. Example: Changing a Task

Workflows can also be used to create tasks. HandsOn Connect comes with workflows that automatically assign tasks to the **Partner Approval Manager** when a new organization registers, and to the **Opportunity Approval Manager** when a partner submits a new volunteer opportunity.

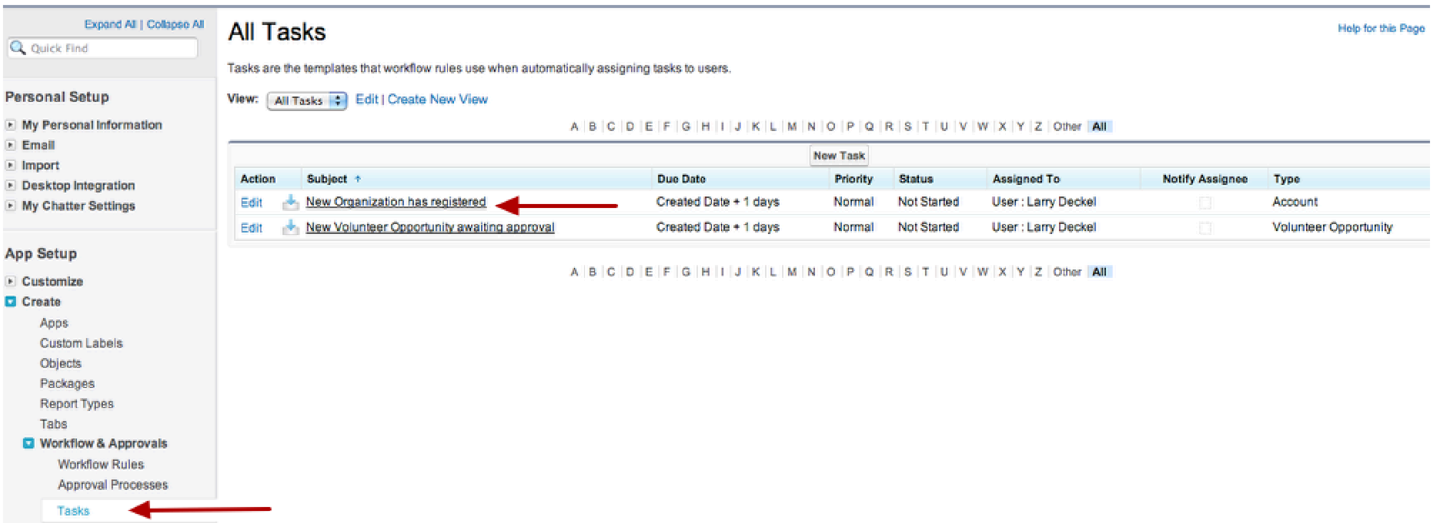
You create workflows involving task in much the same way as creating workflows for field updates:

We can see the tasks that have already been created for use in workflows by clicking on **Setup / App Setup / Create / Workflows & Approvals / Tasks**

What if we wanted to change WHO the task for approving a newly registered organization is assigned to? Or wanted to change the wording or deadline for the task itself?

To do this we would edit the workflow action.

We are not going to change the workflow rule - but just the Workflow Action. The action type is TASK.

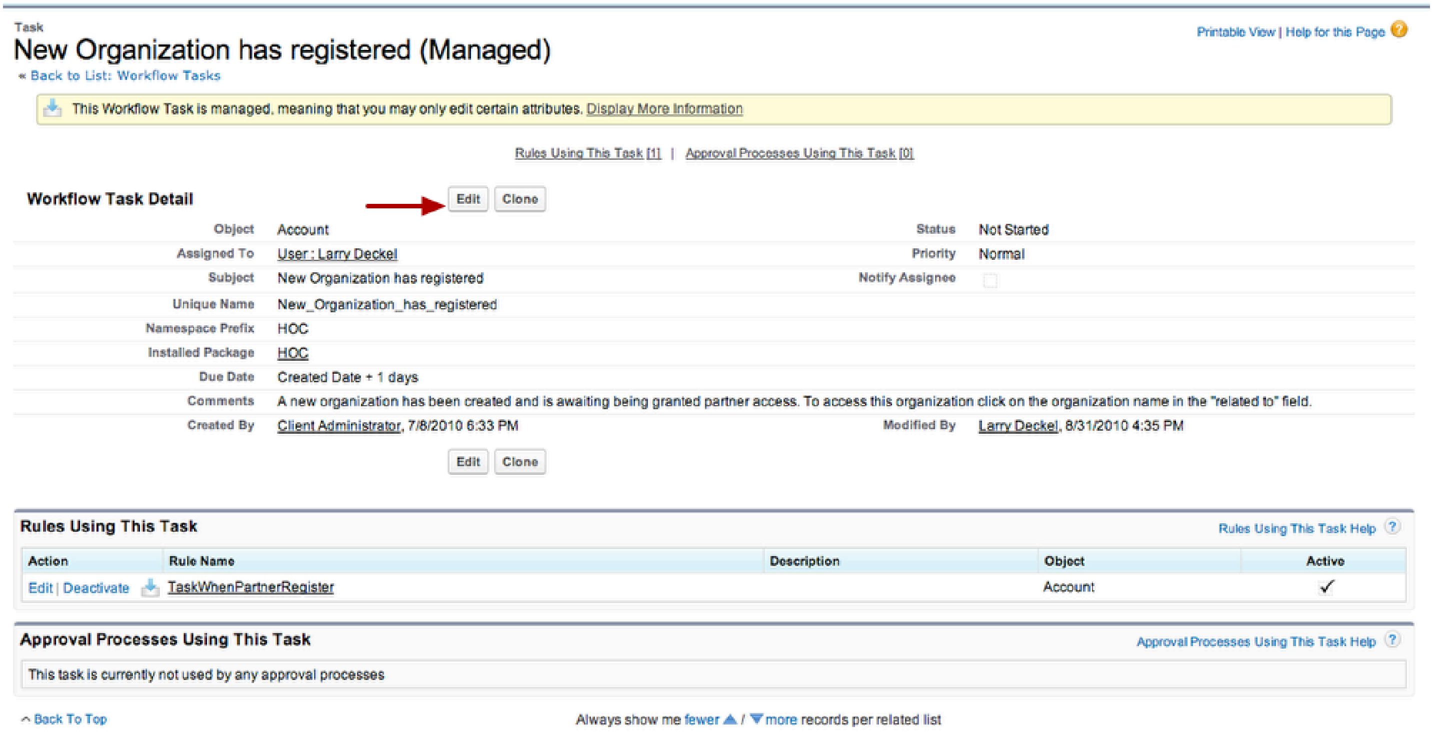


Go to **Setup / Create / App Setup / Workflows & Approvals / Tasks**

(or type "tasks" in the quick find)

Let's Look at the task that is assigned called: "New Organization has Registered". Click on the Hyperlink to view it:

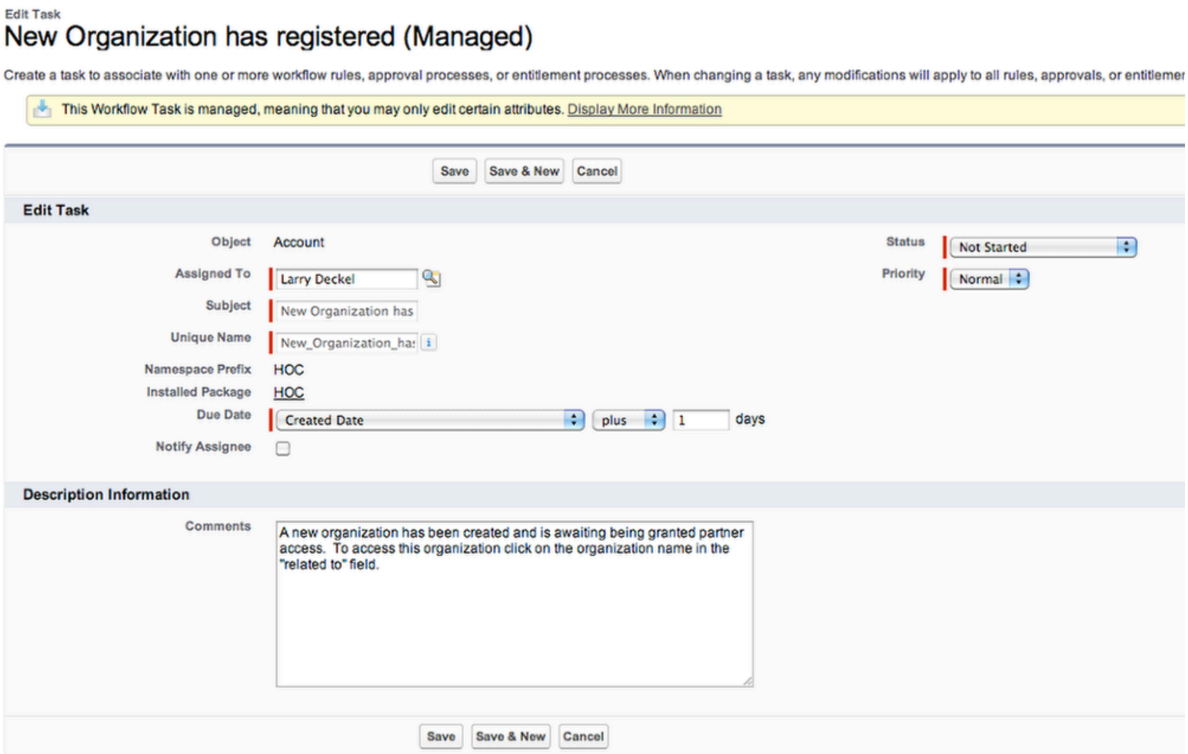
This task is created based on a workflow rule that was already created:



It's the Workflow Task Detail we wish to edit (This is the Workflow Action).

This screen also references the Workflow Rule that evaluates whether or not to execute the Action.

We can now edit the task.

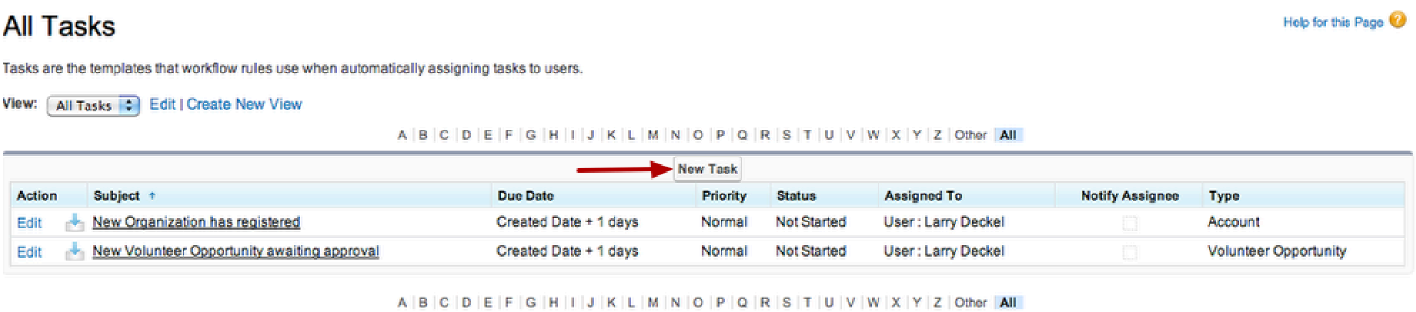


Because this task is part of the HandsOn Connect package -- we cannot modify all fields. The Subject line of the task is locked. However we can change:

- Who the task is assigned to
- When the task is set as "Due"
- The comments field on the task

Click **Save.**

We can create new tasks from scratch, and associate them with existing workflow rules



We could either create a new workflow rule and then create the task, OR we could edit an existing Workflow Rule and add another Workflow Action.

You could also just create a new task by clicking on the NEW Task button -- however the task won't execute until you associate it with a Workflow Rule.

How to build a Process in Process Builder

Processes are the "new workflows". A greatly improved automation method for Salesforce.

To learn more about automating simple business processes with Process Builder, we recommend working through the simple training provided in Trailhead

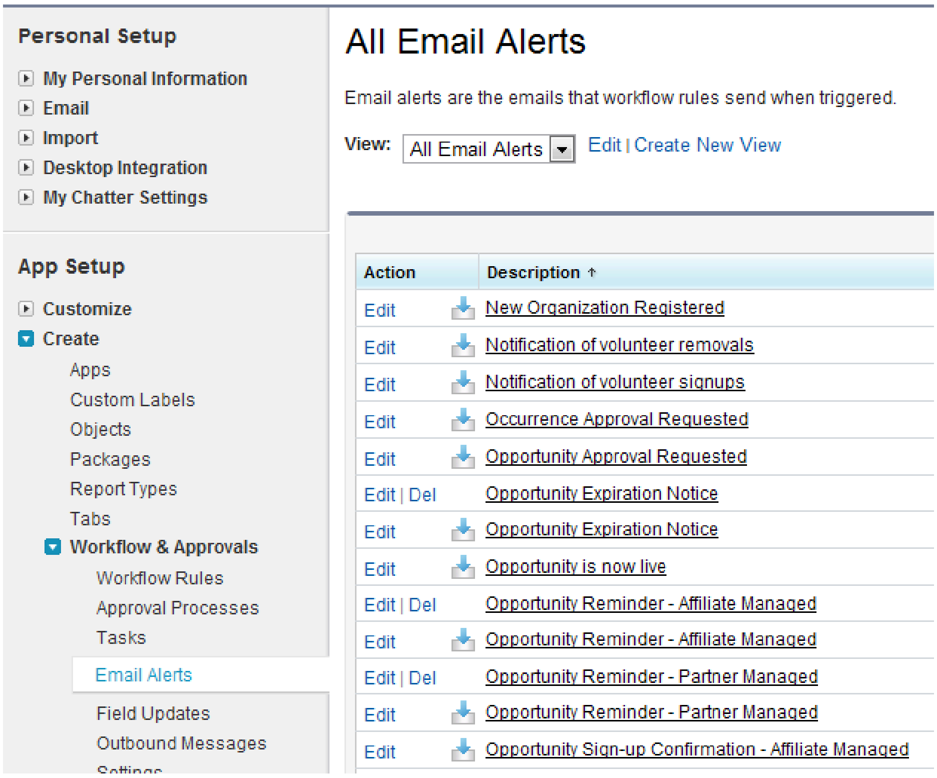
Trailhead: Automate Simple Businesses with Process Builder.

Workflows involving Email Alerts

Working with Email Alert workflow actions

Email Alerts are the basis for many of the email notifications that are automated in the system such as confirmation messages to volunteers when they sign-up as well as notfiying agencies of the sign-ups.

Email Alerts

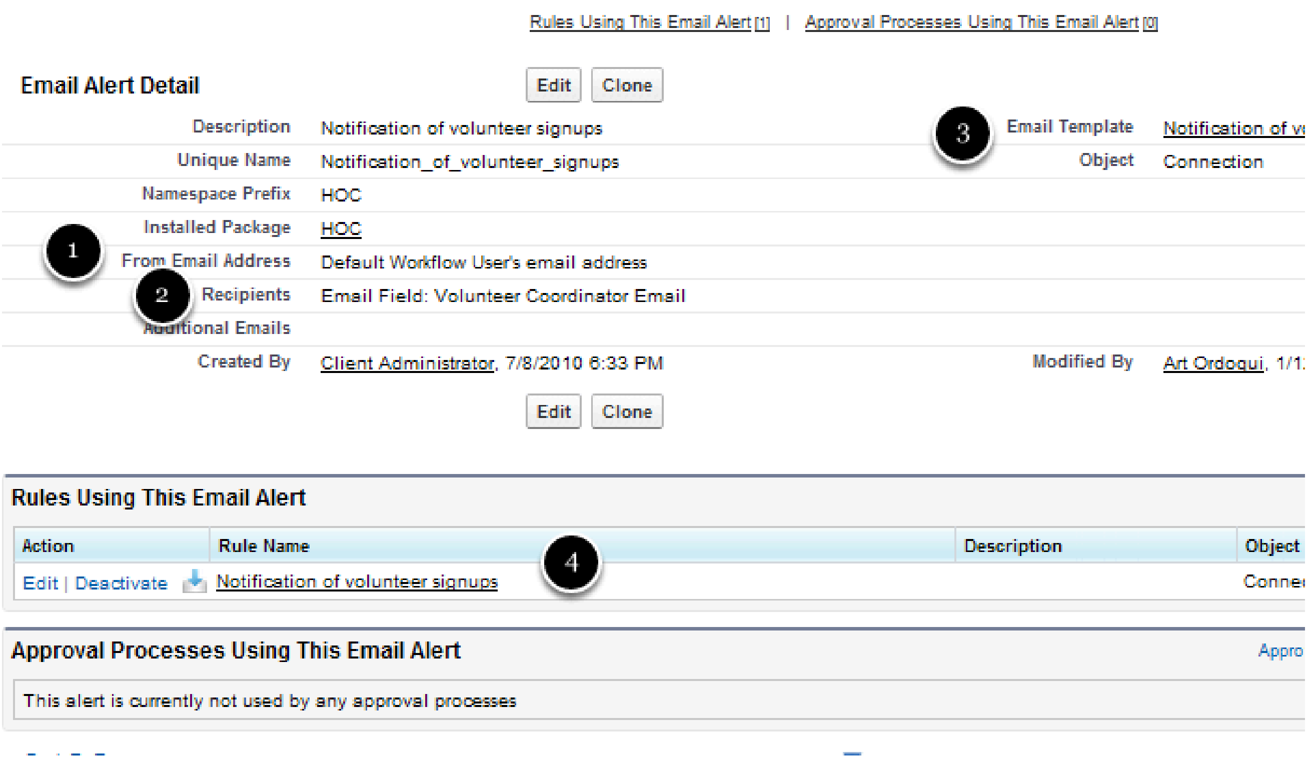


To view the email alerts go to Setup/App Setup/ Create/ Workflow & Approvals/ Email Alerts.

This shows you the description, email template, and the object assocaited with the Alert.

Click on the description of the Email Alert to view the details.

Email Alert Detail



1) From Email Address- Indicates who the email will be sent from. The typical options here are "Current User", "Default Workflow User", or using your "Organization Wide Email Address".

- Use "Current User" if the sender should always be the user who triggers the workflow.
- Use 'default workflow user' if you want it to come from the designated default workflow user in your organization (usually your System Administrator). (NOTE: you can set the default workflow user in Setup / Process Automation Settings)
- Use your Organization wide email address when you want it to come from your specified 'general' reply-to email.   (See this article on setting your organization-wide email address)
- See the info section at the end of this article for the recommended settings for all the Email Alerts that are part of HandsOn Connect if you are editing any existing email alerts.

2) Recipients- shows who will receive the email. In most cases this will be the Opportunity Coordinator, Partner staff, or Volunteer

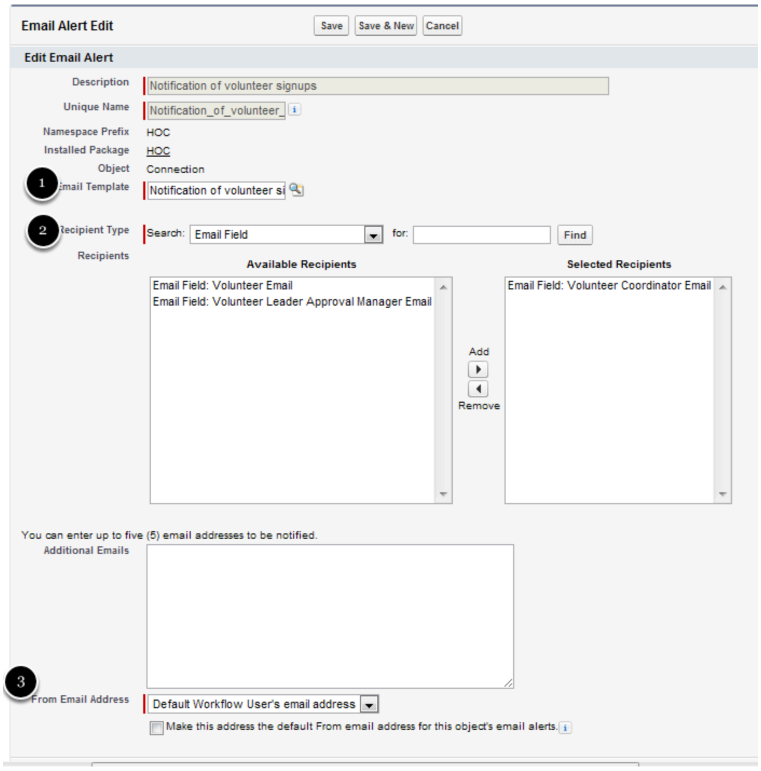
3) Email Template- This is a link to the template used when this email alert is triggered.

4) Rules using this email alert-   This provides a link to the Workflow Rule that operates this email alert, so when the conditions in the rule are met, then this email is generated using the associated email template.

You can turn on/off this rule from here or from the Workflow rules list. Most of the rules are managed and can't be edited only activated/deactivated

Editing Recipient or Sender

Click Edit at the top of the Email Alert Detail



1) **Email Template**- If you would like to designate a different email template to use for this alert, you can do a look-up to associate a different template. You only need to do this if you want a completely different email template to be used. If you are just wanting to edit the email template follow the steps found here.

It is not recommended that you modify any of the standard email Alerts, rather click Clone from the Email Alert Detail page. Make the changes to the clone and then deactivate the original alert to begin using the new alert and template.

2)   **Recipients**

Recipient Type: this drop down lets you search for the emails based on various groups such as Users, Groups, and Email Field. Usually you will use "Email Fields"

Available Recipients: This is based on the Recipient Type. You can choose any of the Available Recipients and use the Add arrow to move them to Selected Recipients.

Selected Recipients: This indicactes the users from the various types that have been selected to receive this email alert. You can select multiple recipients.   If you select a recipient such as Email field: Volunteer Coordinator Email, it'll use the Volunteer Coordinator's email associated with the volunteer opportunity that has triggered the alert.

Note: Volunteer Coordinator Email is the Opportunity Coordinator Email

Additional Emails: This section allows you to manually enter up to 5 emails addresses that you want to receive the notice by default, regardless of their association to the alert or activity.

3) **From email Address:** There are three types of From Email Addresses that will appear in this picklist:

- **Current User's Email Address** (i.e. whoever created or edited the record that the workflow rule evaluated)
- **Default Workflow User**: (the default email address that is used whenever an email alert is created).
- a **SystemWide Email Address**: (these are email addresses you can define and make available for use in the system)

It is NOT recommended that you mark the checkbox to make this the default email for this object -- you'll want to set different From emails for different email alerts.

Once you are done making the edits, Click **Save**.

Advanced Tip: *When searching for the 'recipient type", the "Related User" list pulls the values of the default Partner Approval Manager, Opportunity Approval Manager, and Volunteer Leader Approval Manager and sets that person as the recipient. This is used for the email alerts "New Organization hass Registered" , "Occurrence Approval Requested" and "Opportunity Approval Requested".*

This is the best setting for these alerts if you use only ONE person as Opportunity Approval Manager for all your organizations.

***If** you wish to have different opportunity approval managers associated with different organizations, then you want to set the email alert recipient for "Occurrence Approval Requested" and "Opportunity Approval Requested" to "Email Field: Opportunity Approval Manager Email" (search through recipient type "Email Field"). This will pull the email address directly from the opportunity or occurrence record, RATHER than from the setting in the control panel).*

For Reference Only:

Here are the recommended settings for the "From Email Address" for the Email Alerts that are part of the HOC managed package. You can change these if desired. In the screenshot below, anywhere you see the From Email Address as "HandsOn Connect" <clientmanager@handsonconnect.org> you should update your email alerts to use YOUR organization-wide email address.

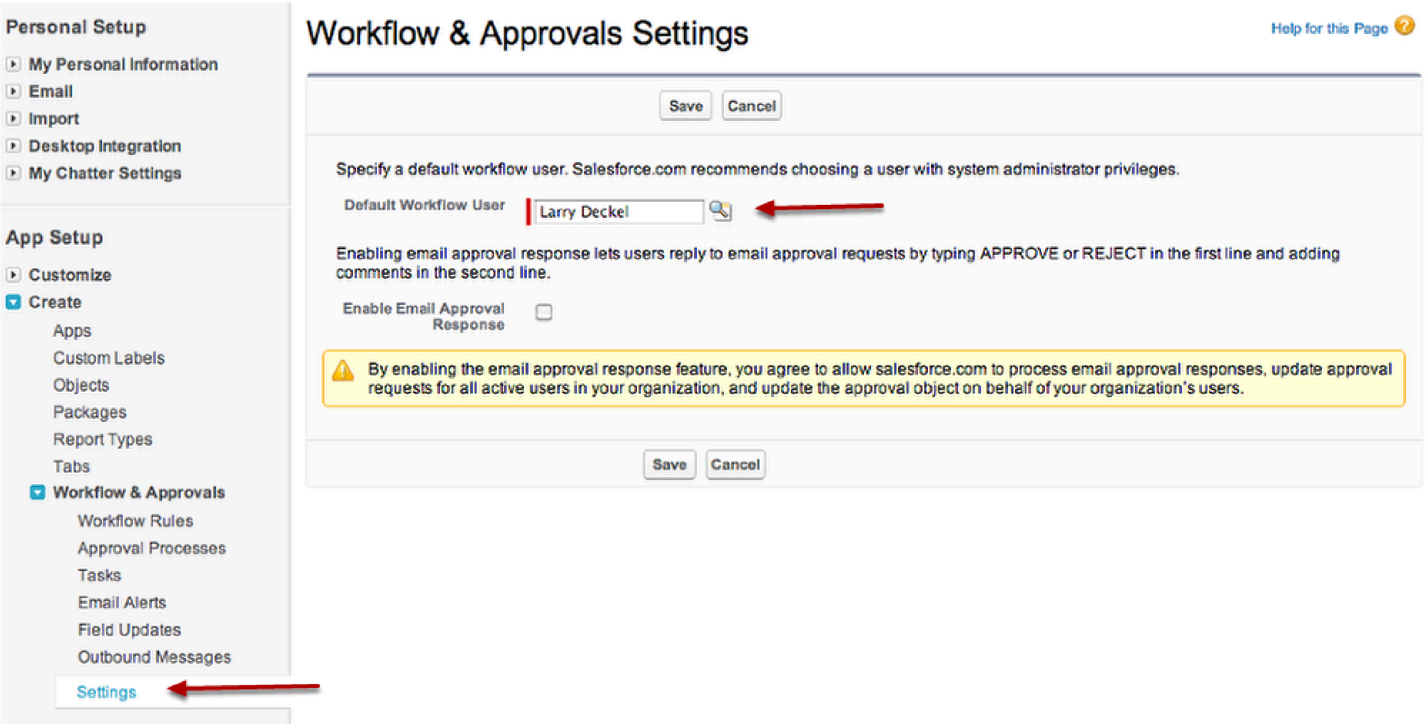

HOC Email Alerts

Setting the Default Workflow User

The Default workflow user's email address is set, by default, as the Sender of all email alerts send through workflows.

It can be defined to be any licensed salesforce user in your organization - and typically is the System Administrator.

Default workflow User (Classic)

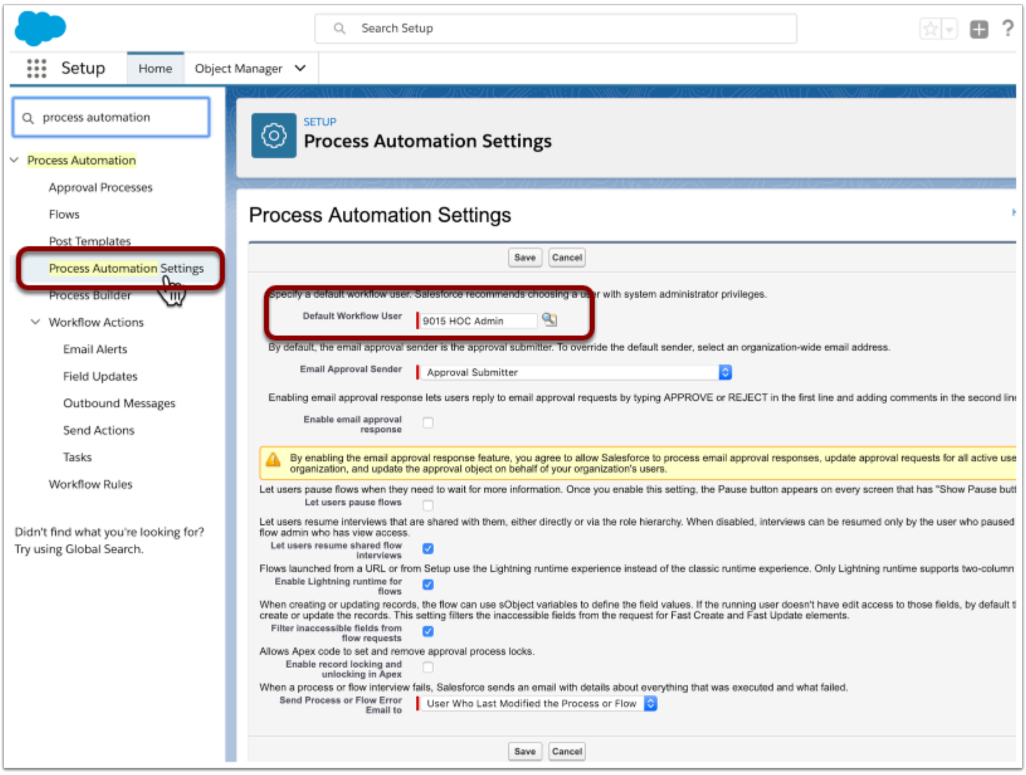


The majority of the emails in the system are sent from whoever you designate as "Default Workflow User" (Or you can set an organization-wide email address as the 'from' for your emails.

We pre-set this as your system administrator. But you can make any licensed Salesforce User in your system the default workflow administrator.

Default Workflow User (Lightning)

Go to Setup / Process Automation Settings


Search Setup
Setup
Home
Object Manager
process automation
Process Automation
Approval Processes
Flows
Post Templates
Process Automation Settings
Process Builder
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
Tasks
Workflow Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Process Automation Settings
Process Automation Settings
Save
Cancel
Default Workflow User
9015 HOC Admin
Email Approval Sender
Approval Submitter
Enable email approval response
Let users pause flows
Let users resume shared flow interviews
Enable Lightning runtime for flows
Filter inaccessible fields from flow requests
Enable record locking and unlocking in Apex
Send Process or Flow Error Email to
User Who Last Modified the Process or Flow

Organization Wide Email Addresses -- Configuring "Affiliate Address"

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

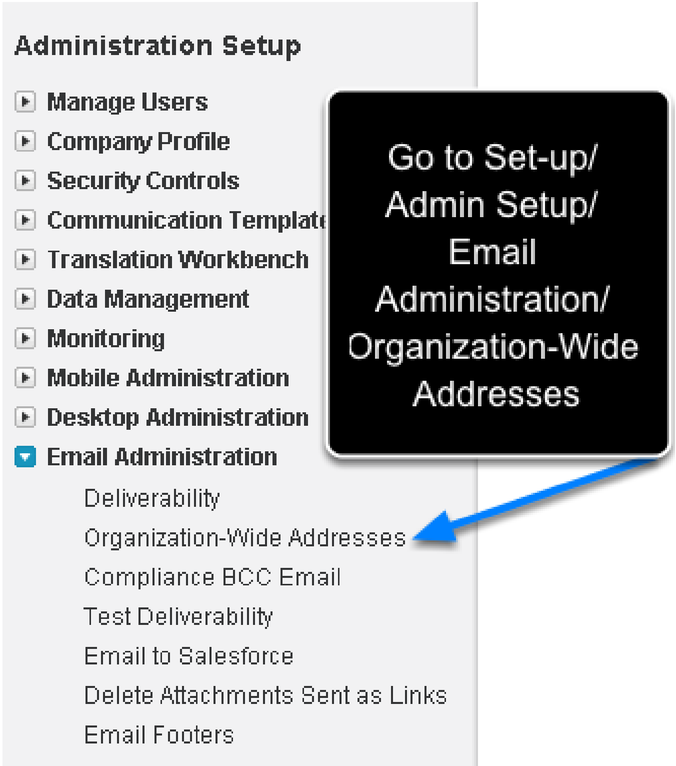
Customers can create as many organization wide email addresses and grant access to various profile to use them.   More information on the organization wide email address can be found at salesforce.com Help & Training.

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

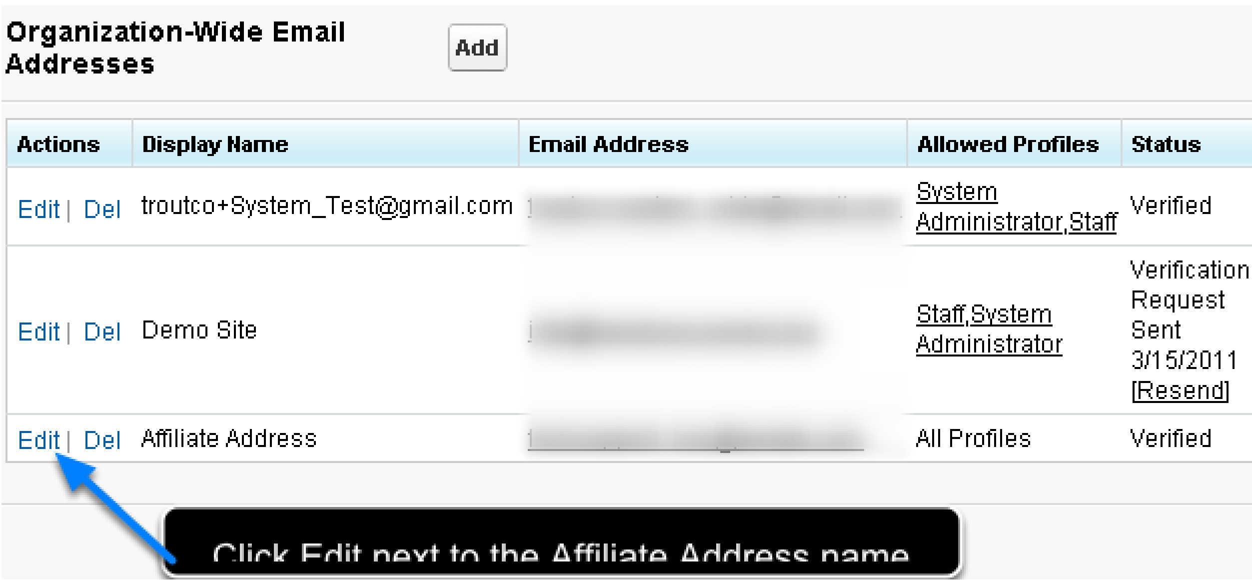
An example of this is the "Waitlisted Opportunity Now Open" email alert.

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

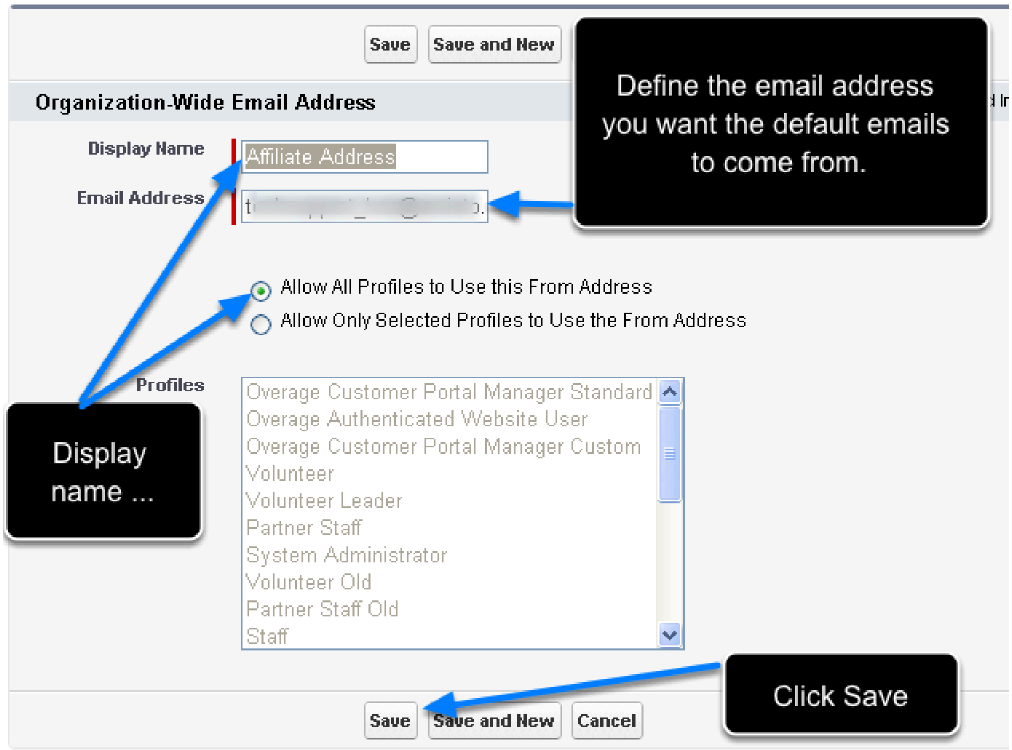
Accessing Organization-Wide Email Addresses



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

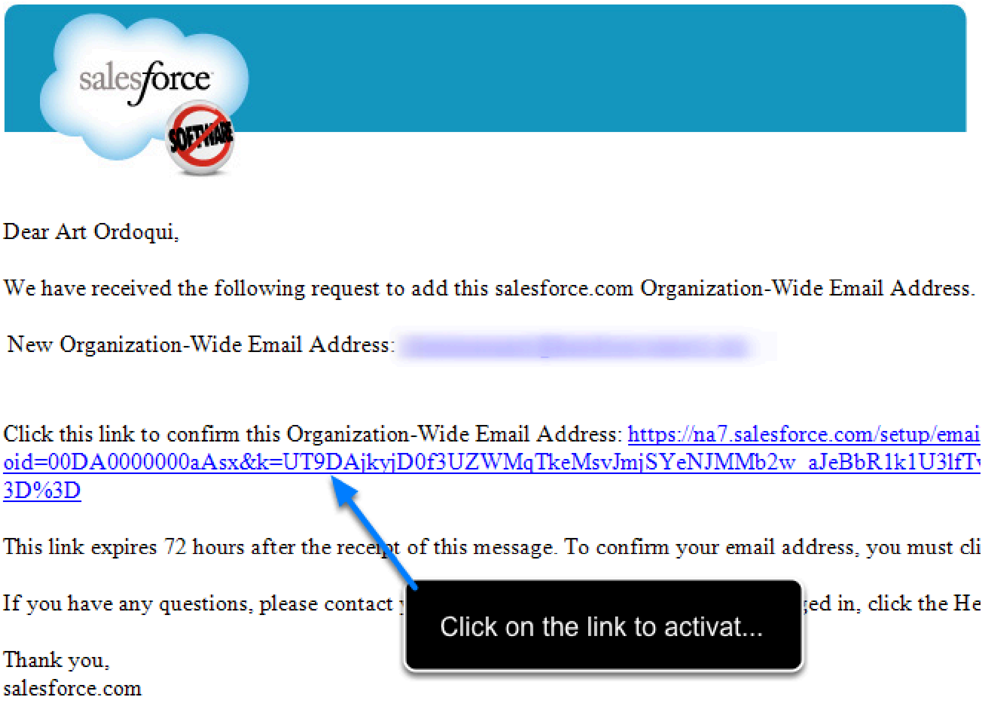


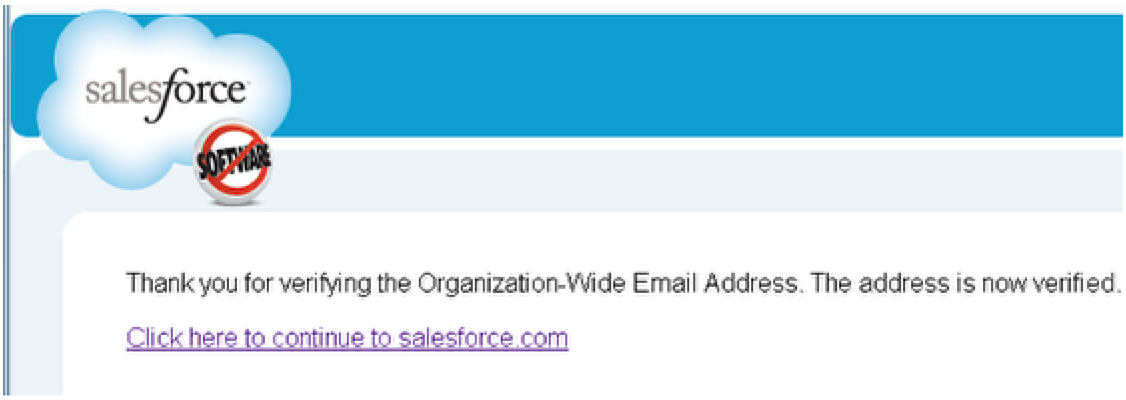
It was originally required to be named Affiliate Address - but now you can give it any name you choose.

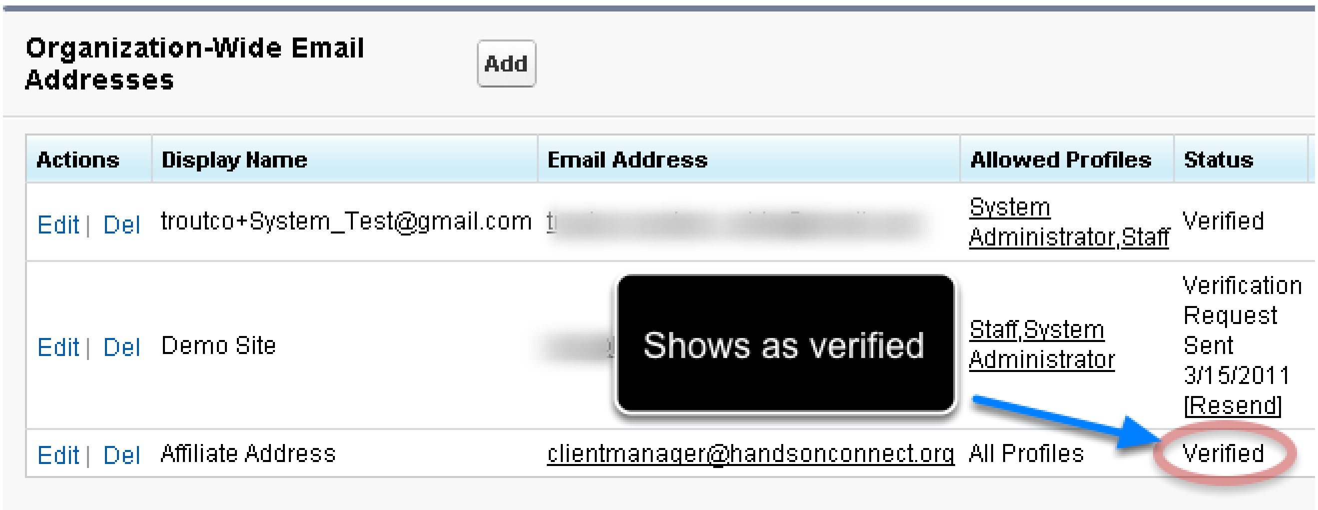


The reason to allow all profiles is that if you use this From Address for an email alert that is triggered from the public site by a volunteer (such as notification of Volunteer Sign-ups or Waitlisted Opportunity Now Open) if the Volunteer profile doesn't have access to this From Address then it could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

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





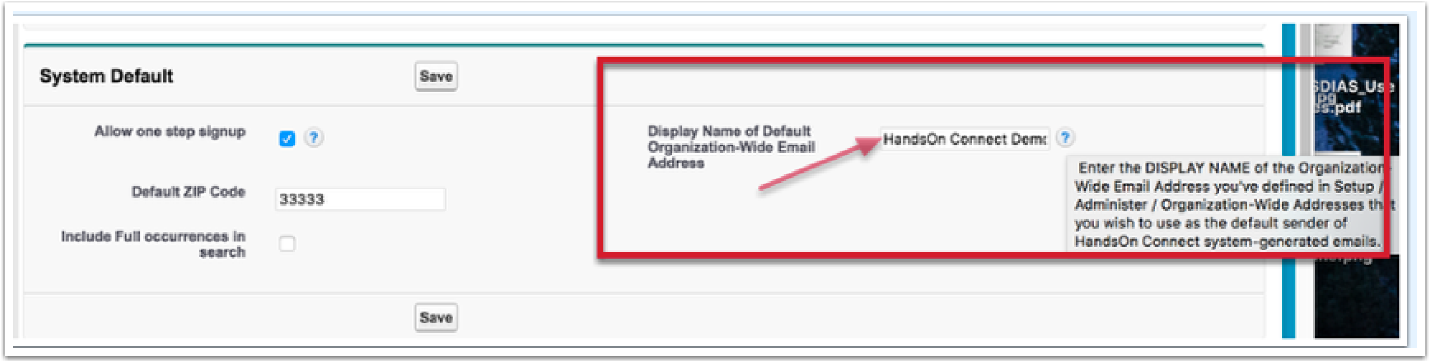


Actions	Display Name	Email Address	Allowed Profiles	Status
Edit | Del	troutco+System_Test@gmail.com		System Administrator,Staff	Verified
Edit | Del	Demo Site		Staff,System Administrator	Verification Request Sent 3/15/2011 [Resend]
Edit | Del	Affiliate Address	clientmanager@handsonconnect.org	All Profiles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

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

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

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



If you started with HandsOn Connect prior to May, 2016

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

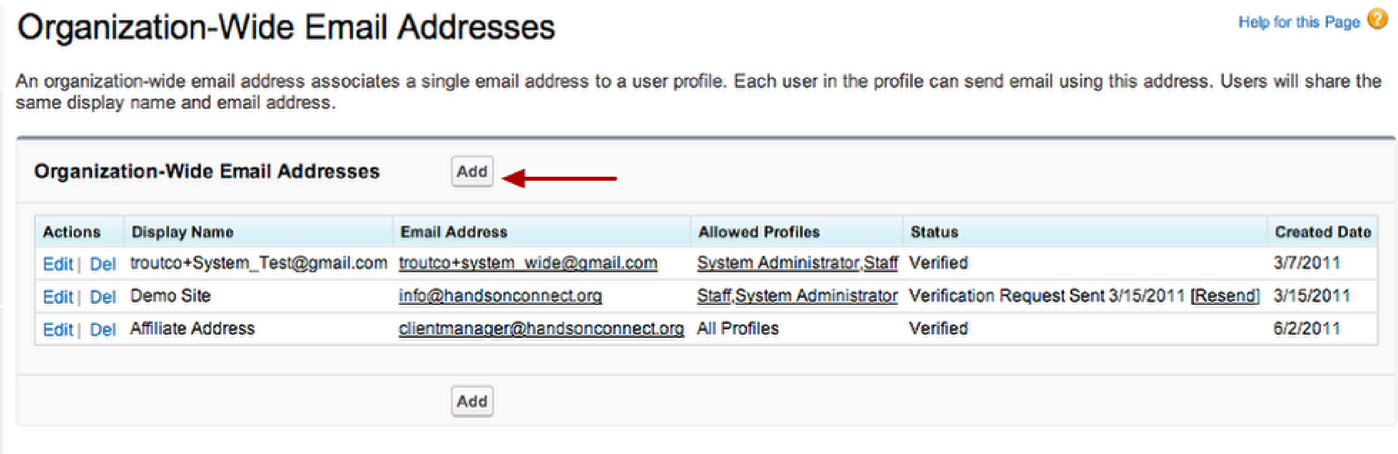
Creating new organization-wide email addresses

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

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

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

Creating a new Organization-Wide Email Address


Organization-Wide Email Addresses

Help for this Page

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

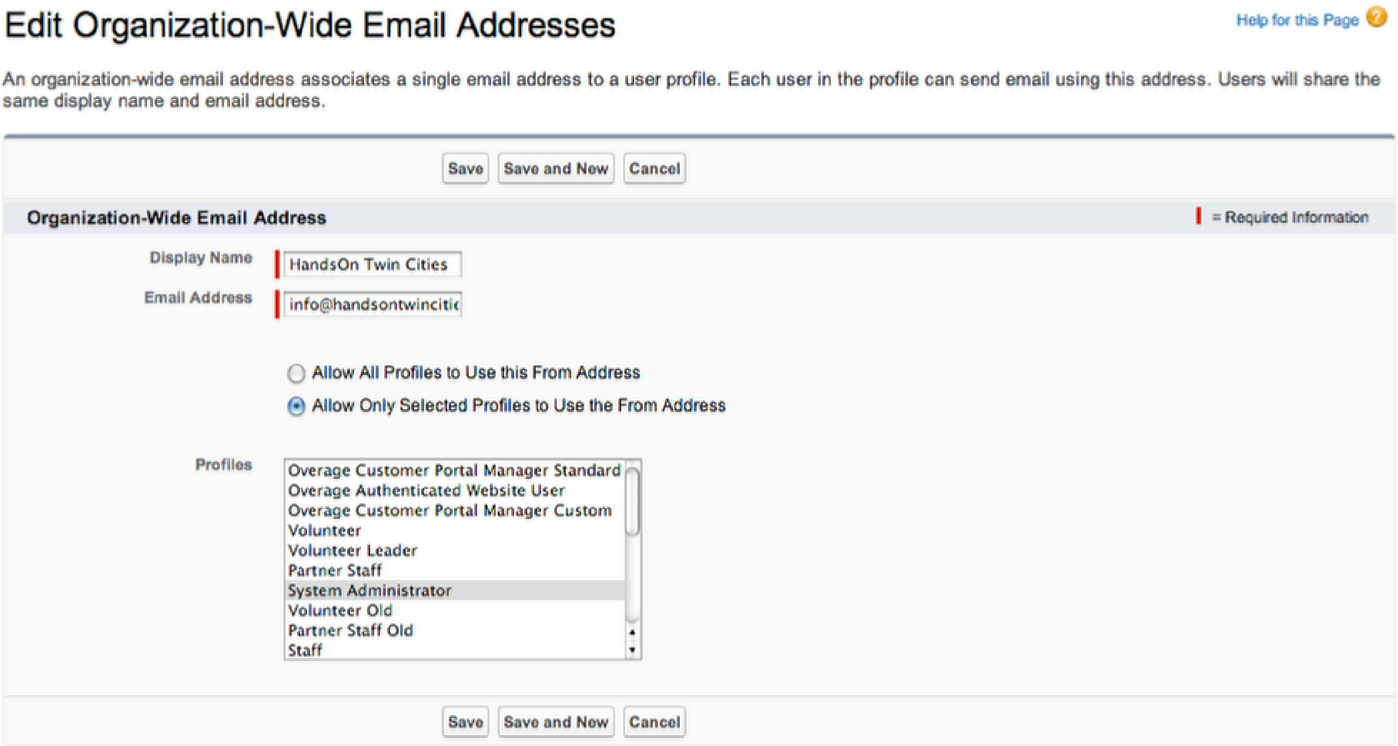
Organization-Wide Email Addresses Add

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

Add

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

Click on the **ADD** button



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

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

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

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

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

Email Customization for Admins

How to update your email templates

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

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

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

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

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

New Template

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

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

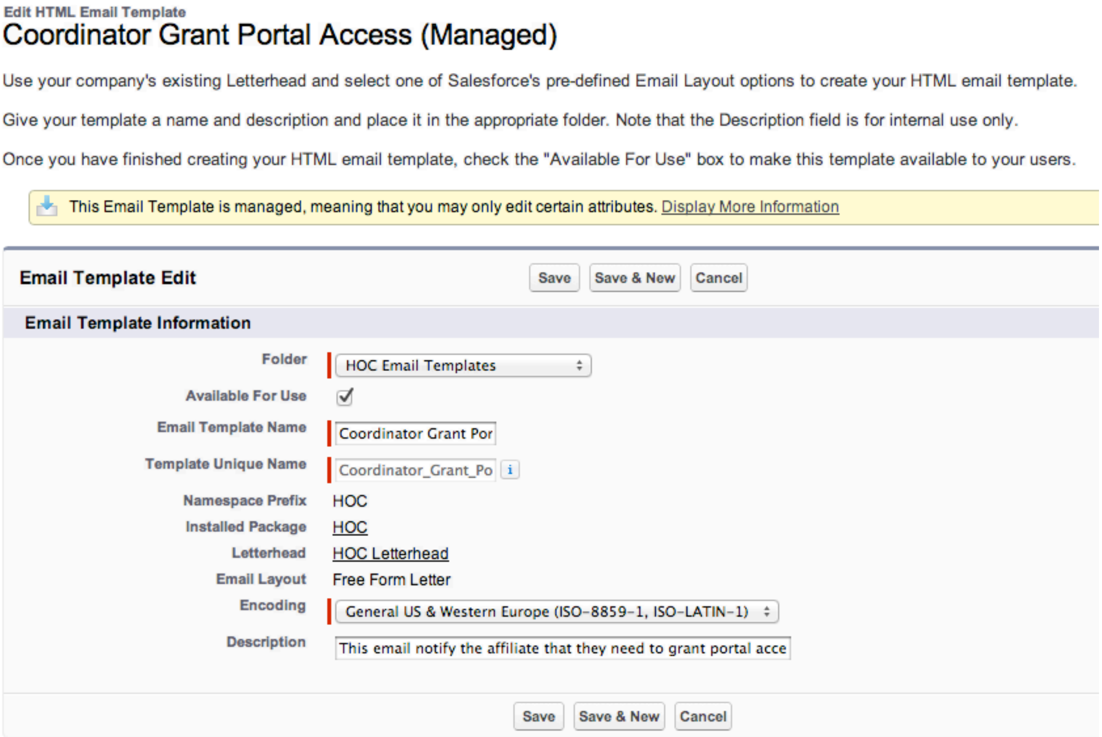
You should see an email template that matches each of the ones found in the zipped archive.

Select your first email template and click on EDIT.

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

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

Click on EDIT next to an email template name

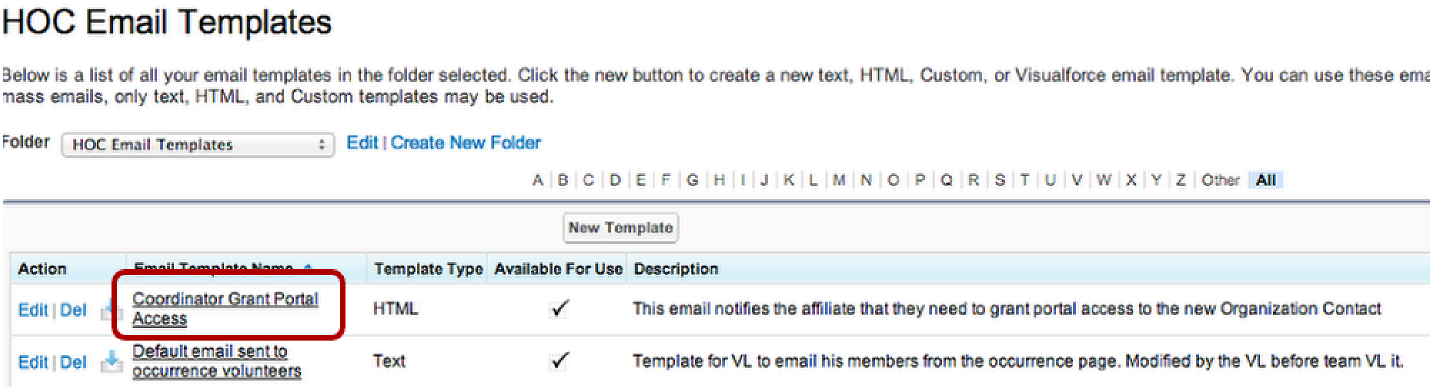


Update the email description if your new version has an improved description. (Feel free to update it further if you want to use your own language to make it clearer to you what the email template does).

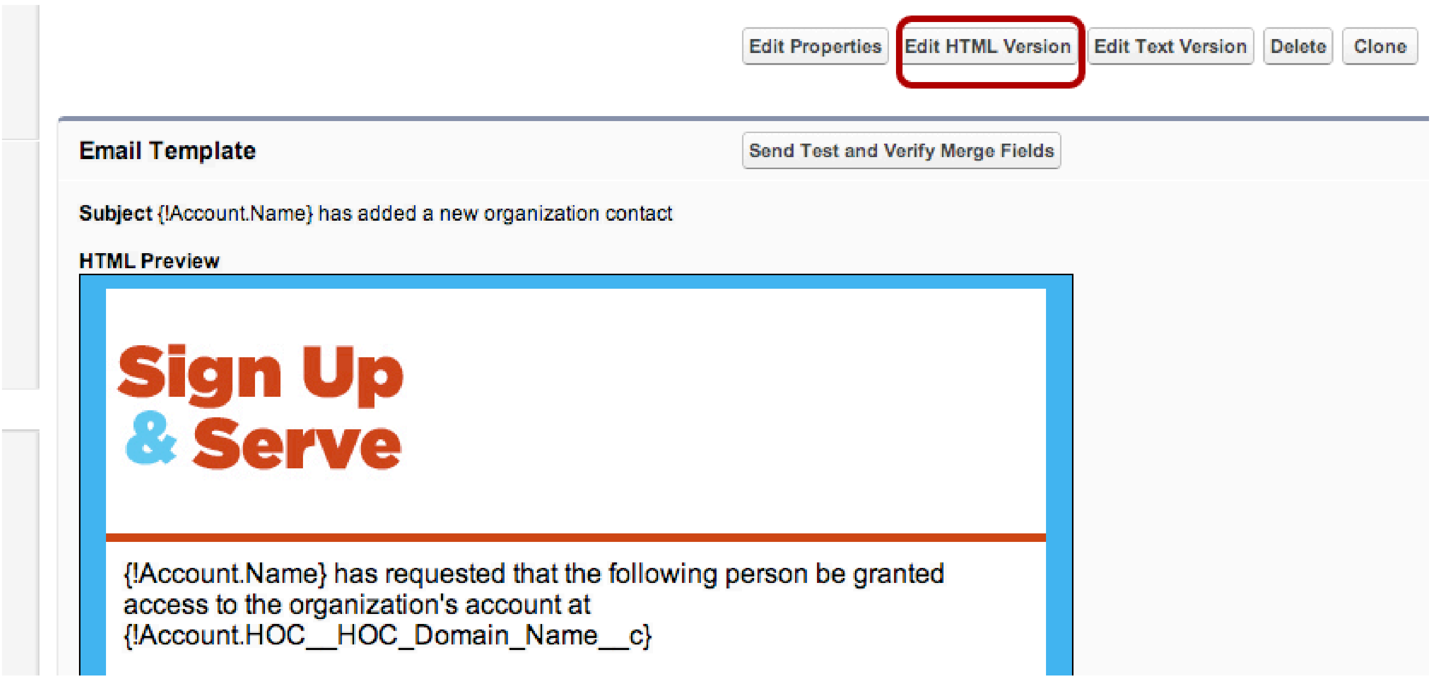
SAVE the change.

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

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



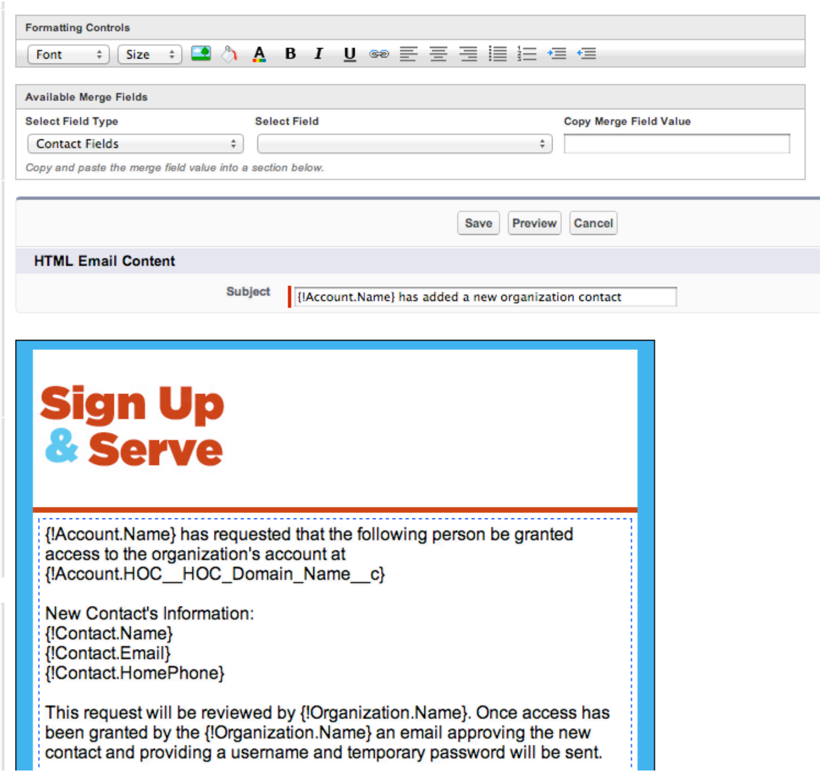
Then click on the "Edit HTML" button.



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

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

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



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

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

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

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

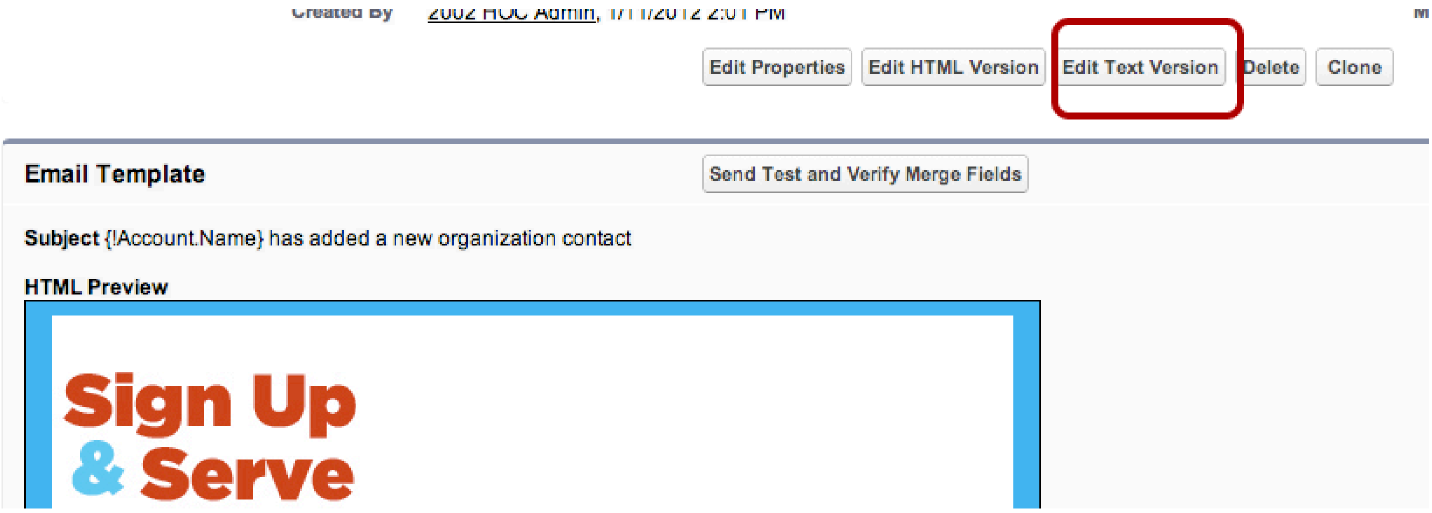
If you are satisfied with the look of the email:

Then click SAVE

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

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

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

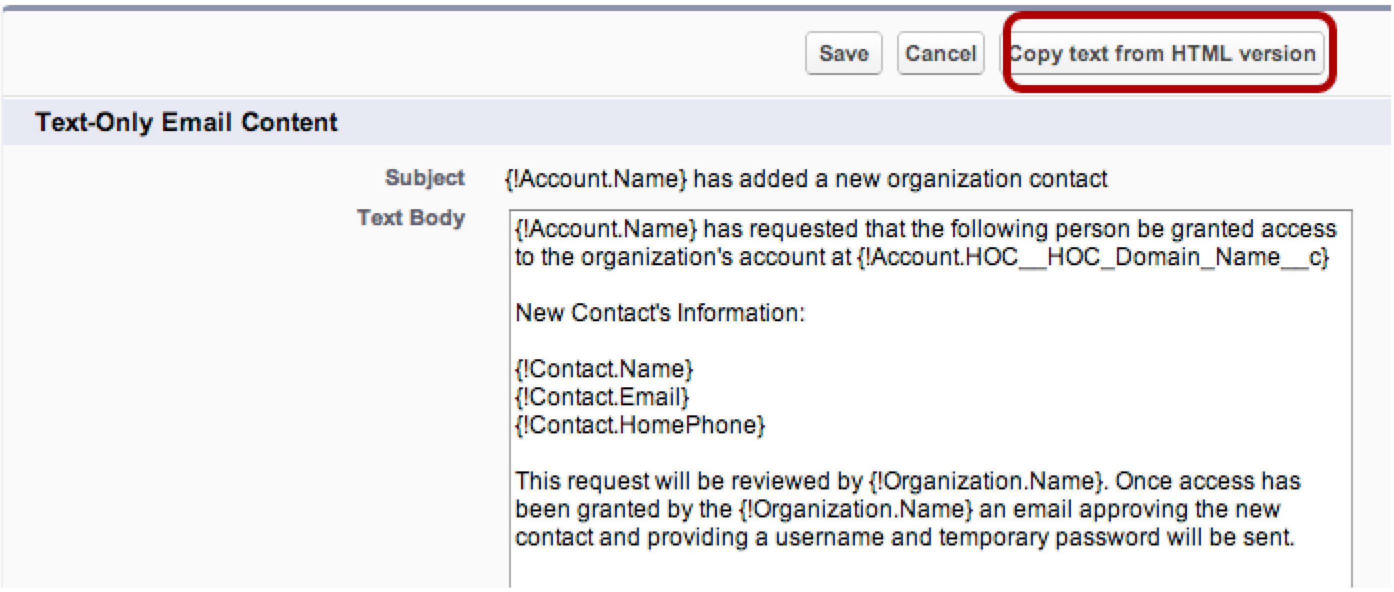


Click on "Edit Text Version"

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

Click Save.

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



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

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

Click SAVE.

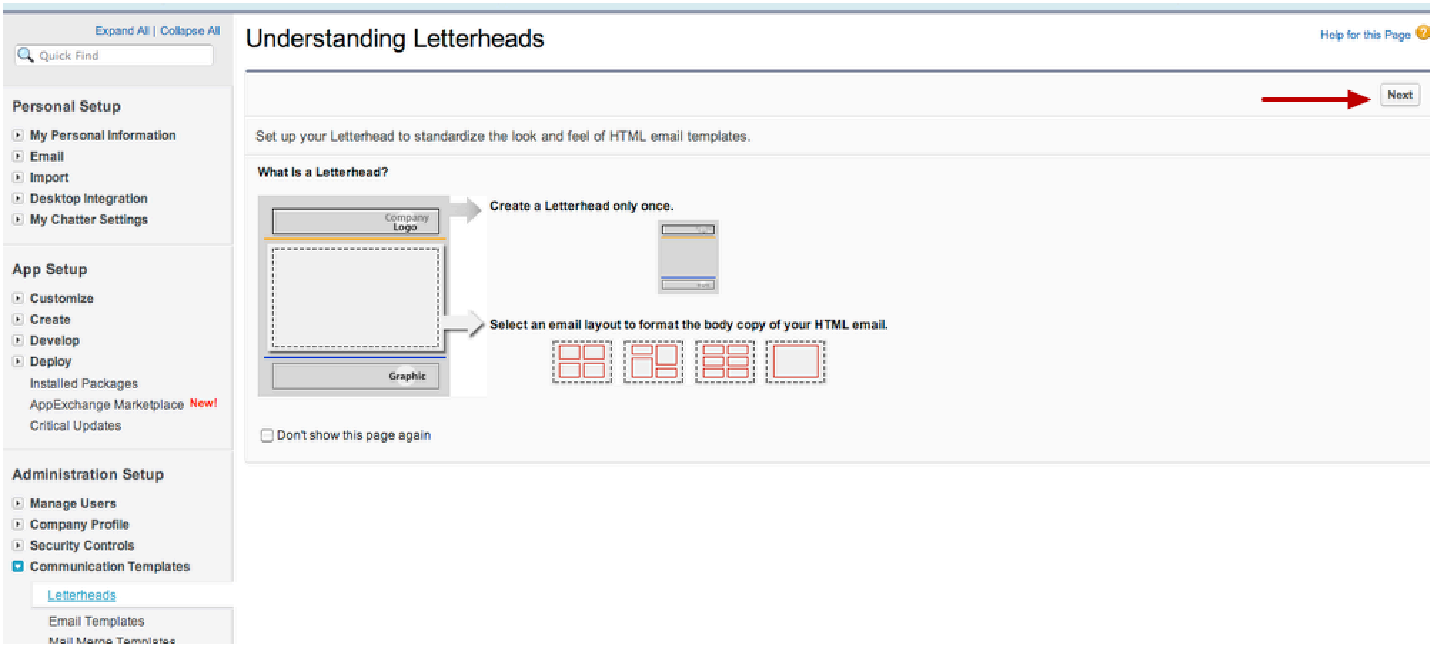
If you want to test the email template further, you can then choose to Send a Test and Verify Merge Fields.

Customizing the HandsOn Connect Letterhead

The letterhead that comes with HandsOn Connect has your logo in the upper left, two dividing lines, and no footer.

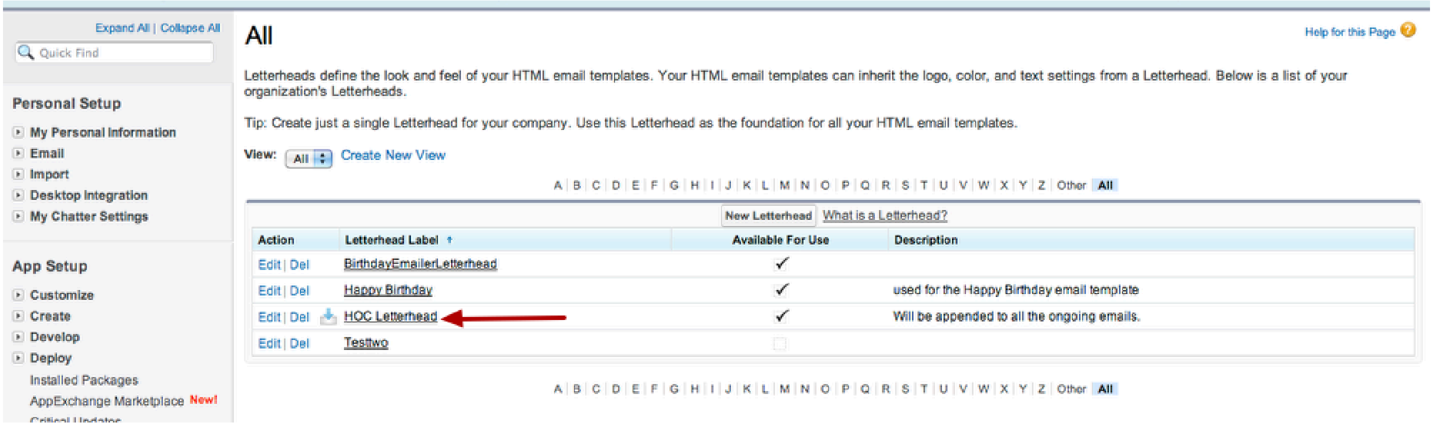
The background color is gray. But you can customize your letterhead to match your organizations color and style.

Understanding Letterheads



Click on YOUR NAME MENU / SETUP / Administration Setup / Communication Templates / Letterheads. (or search for Letterheads from the quick find menu on the Setup left sidebar. A help screen will show you the basics of letterheads.

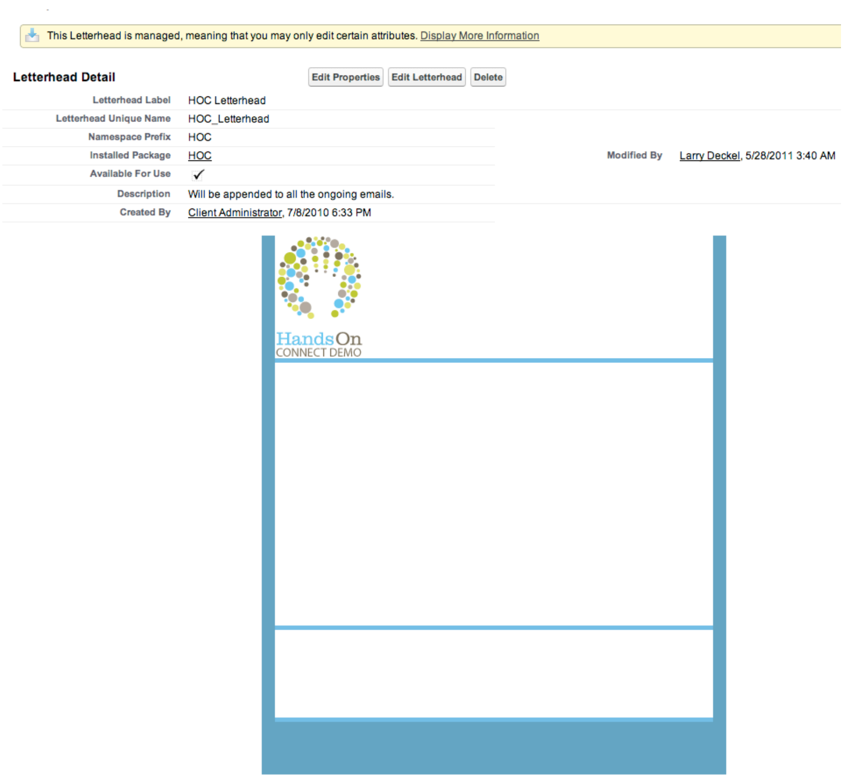
HandsOn Connect comes with a standard letterhead named HOC Letterhead that is used for all email alerts sent out by the system. Click NEXT in the upper right to go to the letterhead Home Page



You can create new letterheads by clicking on the NEW letterhead button. (These new letterheads could be used for personal emails you may wish to send from the system).

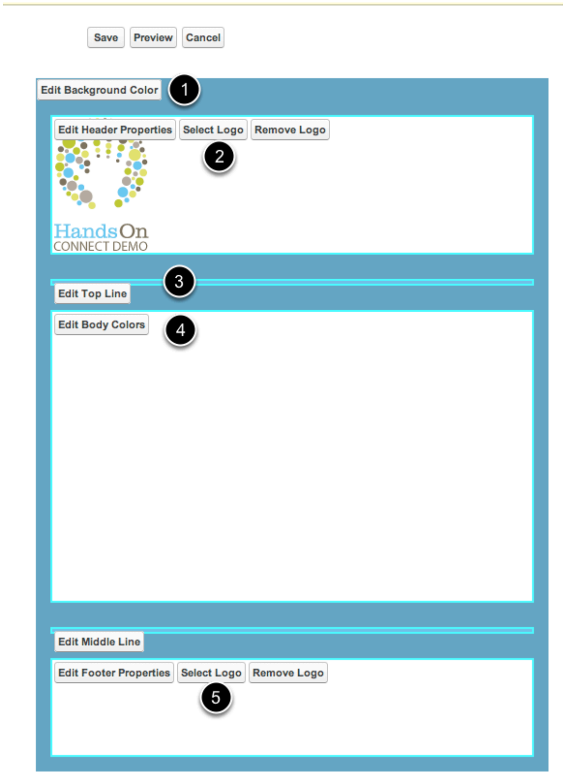
Since the email alerts all use the managed, HOC Letterhead.... we'll click on its name (not edit), so that we can see the letterhead

Letterhead View page



Click on Edit Letterhead to make changes to the letterhead.

Edit view of Letterhead Page



1. Edit Background Color allows you to set the background color of the email from its default gray.
2. The header section allows you to select the logo and set its alignment. Any logo or banner can be substituted for your stock Affiliate Logo that we've prepopulated, but it must be first added to a document in the documents folder like any other website image.
3. The Top and Middle line can be edited to change its color and thickness.
4. The Body color (background of the email can be changed. White works best, but if's up to you!
5. The footer area is blank by default, but you can add a graphic image to serve as the footer for all emails. The image must be saved in a documents folder and be an externally available image. You can create a footer image that has text on it (if you wish to do a message) - but the footer image cannot be hyperlinked - so its not effective for banner ads or links to social networks.

Alternately, you can create a text-based footer with URLS that should link in most email clients, by following this approach:

NOTE: the maximum width for an image in the header or footer is 550 pixels wide.