

# SYSTEM ADMINISTRATOR -- INTRO TO CUSTOMIZING HOC TO MEET YOUR BUSINESS PRACTICES

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# Getting ready to Customize HandsOn Connect

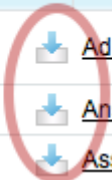
# The HandsOn Connect app is a Managed Package




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



Action	Label
Edit	 <a href="#">Ad Group</a>
Edit	 <a href="#">Answer</a>
Edit	 <a href="#">Association</a>

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!

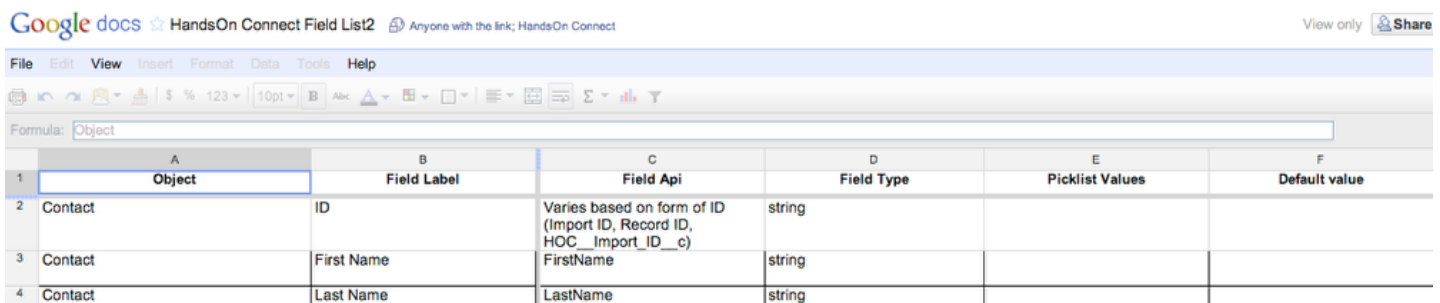
In this training and manual we are going to show the various ways in which HandsOn Connect can be customized and edited.

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?



	A	B	C	D	E	F
1	Object	Field Label	Field Api	Field Type	Picklist Values	Default value
2	Contact	ID	Varies based on form of ID (Import ID, Record ID, HOC_Import_ID__c)	string		
3	Contact	First Name	FirstName	string		
4	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
	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
35	Contact	Ethnicity/Race	RECOMMENDED		Identifies the ethnicity/race as identified by the contact. This list can not be altered.	DO NOT EDIT
36	Contact	Gender	RECOMMENDED		Identifies the gender as identified by the contact. This list can not be altered.	DO NOT EDIT
37	Contact	Heard About Us?	RECOMMENDED		Allows volunteers to indicate how they heard about your volunteer center	Yes
38	Contact	Home City	RECOMMENDED		Contains the related information for the Contact's mailing address.	

**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
	Object	Field Label	Editable	Integration	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.

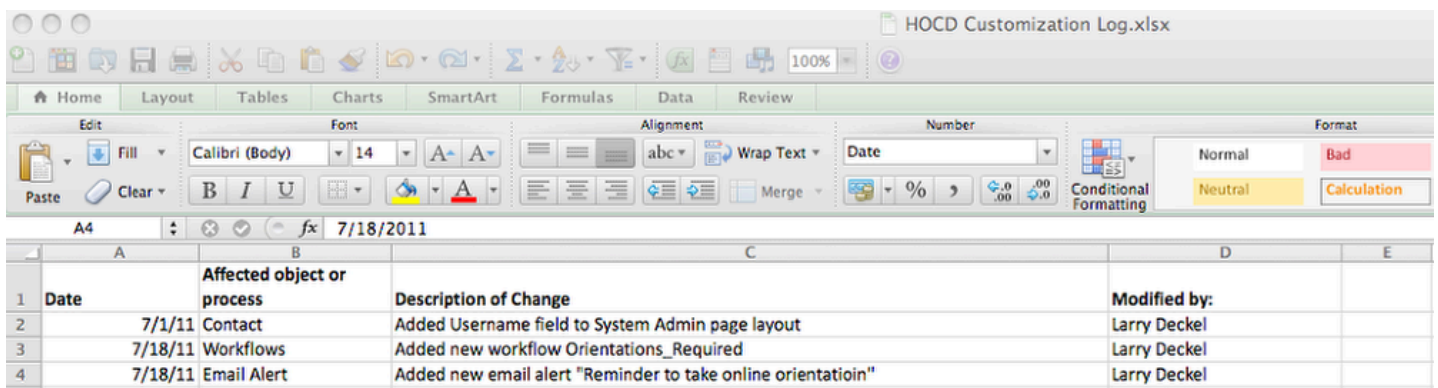
 **Note:** This list is the original list of HOC fields. A number of fields have been added to the HOC managed package since this list was originally created. If you have questions about a field in an object that you do NOT find in the field list -- open a support ticket and inquire about the field. Whenever 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 Salesforce

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.



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E
1	Date	Affected object or process	Description of Change	Modified by:	
2	7/1/11	Contact	Added Username field to System Admin page layout	Larry Deckel	
3	7/18/11	Workflows	Added new workflow Orientations_Required	Larry Deckel	
4	7/18/11	Email Alert	Added new email alert "Reminder to take online orientation"	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**

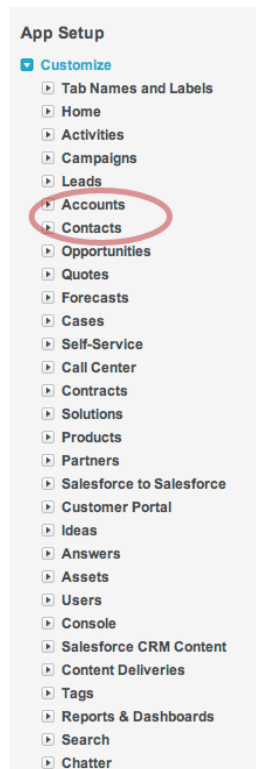
**Contacts**

## 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:

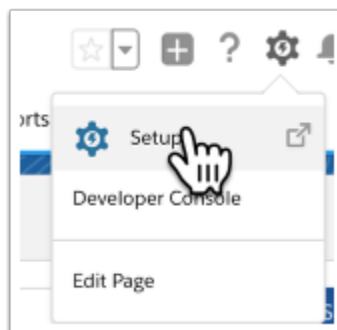
- Volunteer Events
- Volunteer Opportunities
- Occurrences
- Recurrences
- Connections
- Volunteer Teams
- Volunteer Team Members
- Locations

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



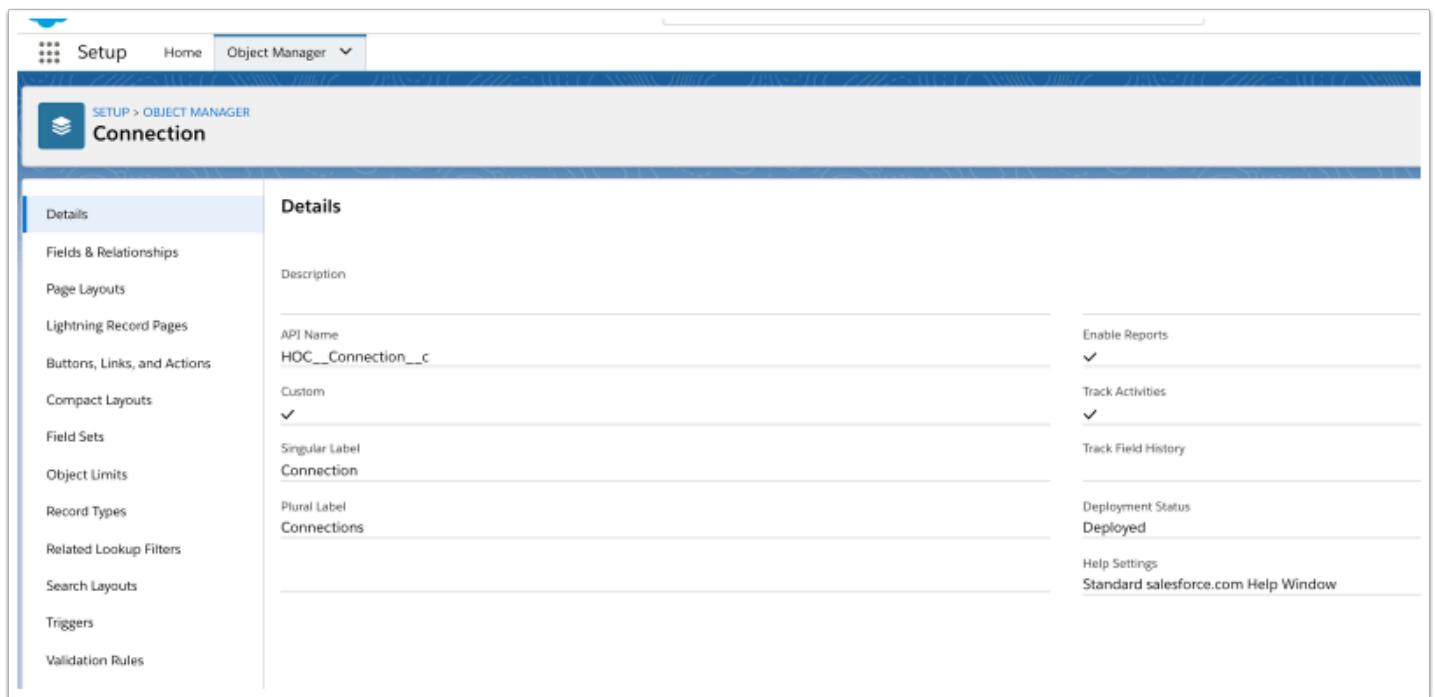
## To Access Objects in Salesforce Lightning

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. It 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.

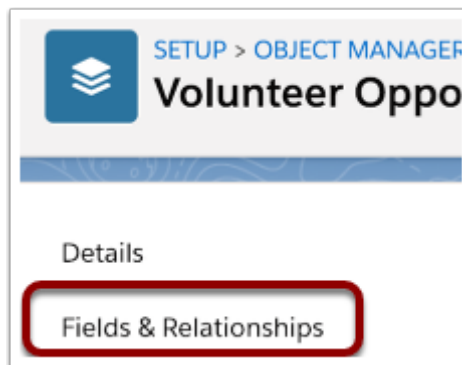
 When in doubt about whether altering a picklist's values will impact normal HandsOn Connect operations - drop into a lab or open a support ticket. We'll be happy to tell you what is and isn't advisable.

## 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:

**Custom Objects**

Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use custom objects to extend salesforce.com functionality or to build new application functionality. Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.

[New Custom Object](#)

Action	Label	Installed Package	Master Object	Deployed	Description
<a href="#">Edit</a>	<a href="#">Ad Group</a>	Salesforce for Google AdWords		✓	A Google Ad Group is a collection of Text Ads and Keywords
<a href="#">Edit</a>	<a href="#">Answer</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">Association</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">Connection</a>	HOC	Occurrence, Volunteer Opportunity	✓	
<a href="#">Edit</a>	<a href="#">Google Campaign</a>	Salesforce for Google AdWords		✓	Google AdWords Campaigns are high-level marketing initiatives
<a href="#">Edit</a>	<a href="#">Keyword</a>	Salesforce for Google AdWords		✓	Keywords are the terms purchased in Google AdWords
<a href="#">Edit</a>	<a href="#">Location</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">Occurrence</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">Question</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">Recurrence</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">Registration Answer</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">Registration Question</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">SFQA Version</a>	Salesforce for Google AdWords		✓	This object is for administrative purposes only and records the current version of the Salesforce for Google AdWords app
<a href="#">Edit</a>	<a href="#">Search Phrase</a>	Salesforce for Google AdWords		✓	Search Phrases are the search terms or phrases the user types into a search box
<a href="#">Edit</a>	<a href="#">Skill</a>	HOC		✓	It will contain the values of skill
<a href="#">Edit</a>	<a href="#">Skill Rating</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">Sponsor Ad</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">Sponsor Group</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">Text Ad</a>	Salesforce for Google AdWords		✓	Text Ads are the advertising copy that displays on the search results page
<a href="#">Edit   Delete</a>	<a href="#">Tool</a>			<input type="checkbox"/>	This is used to track each tool in our tool bank
<a href="#">Edit</a>	<a href="#">Volunteer Event</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">Volunteer Opportunity</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">Volunteer Team</a>	HOC		✓	
<a href="#">Edit</a>	<a href="#">Volunteer Team Member</a>	HOC	Volunteer Team	✓	
<a href="#">Edit</a>	<a href="#">ZipCode</a>	HOC		✓	
<b>Deleted Objects (1)</b>					

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"

Custom Object  
**Volunteer Opportunity (Managed)**

1 This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Standard Fields \[4\]](#) | [Custom Fields & Relationships \[86\]](#) | [Validation Rules \[8\]](#) | [Page Layouts \[4\]](#) | [Search Layouts \[6\]](#) | [Standard Buttons and Links \[8\]](#) | [Custom Buttons and Links \[2\]](#) | [Record Types \[0\]](#) | [Apex Sharing Reasons \[0\]](#) | [Apex Sharing Recalculation \[0\]](#)

**Custom Object Definition Detail** [Edit](#)

Singular Label	Volunteer Opportunity	Description	
Plural Label	Volunteer Opportunities	Enable Reports	✓
Object Name	Volunteer_Opportunity	Track Activities	✓
Namespace Prefix	HOC	Available for Customer Portal	✓
API Name	HOC__Volunteer_Opportunity__c	Track Field History	✓
Created By	Client Administrator, 7/8/2010 6:33 PM	Deployment Status	Deployed
		Help Settings	Standard salesforce.com Help Window
		Modified By	Client Administrator, 7/8/2010 6:33 PM

**Package Information**

Installed Package [HOC](#) Available in Versions 1.0 - Current

**Standard Fields** [Standard Fields Help](#)

Action	Field Label	Field Name	Data Type	Controlling Field	Track History
<a href="#">Edit</a>   <a href="#">Replace</a>	Created By	CreatedBy	Lookup(User)		<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Replace</a>	Last Modified By	LastModifiedBy	Lookup(User)		<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Replace</a>	Owner	Owner	Lookup(User,Queue)		<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Replace</a>	Volunteer Opportunity Name	Name	Text(80)		<input type="checkbox"/>

**Custom Fields & Relationships** [New](#) [Field Dependencies](#) [Set History Tracking](#) [Custom Fields & Relationships Help](#)

Action	Field Label	API Name	Installed Package	Data Type	Controlling Field	Modified By	Track History
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Activity Type</a>	HOC__Activity_Type__c	HOC	Picklist	Type	Client Administrator, 7/8/2010 6:33 PM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Age Groups Served</a>	HOC__Age_Groups_Served__c	HOC	Picklist (Multi-Select)		Client Administrator, 7/8/2010 6:33 PM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Background Check Required</a>	HOC__Background_Check_Required__c	HOC	Checkbox		Client Administrator, 7/8/2010 6:33 PM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">City</a>	HOC__City__c	HOC	Formula (Text)		Client Administrator, 7/8/2010 6:33 PM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Country</a>	HOC__Country__c	HOC	Formula (Text)		Client Administrator, 7/8/2010 6:33 PM	<input type="checkbox"/>

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)"

<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Partner Staff Name</a>	HOC__Partner_Staff_Name__c	HOC	Formula (Text)	Client Administrator, 7/8/2010 6:33 PM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Populations Served</a>	HOC__Populations_Served__c	HOC	Picklist (Multi-Select)	Client Administrator, 7/8/2010 6:33 PM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Posting Status</a>	HOC__Posting_Status__c	HOC	Text(255)	Client Administrator, 7/8/2010 6:33 PM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Primary Impact Area</a>	HOC__Primary_Impact_Area__c	HOC	Picklist	Client Administrator, 7/8/2010 6:33 PM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Program Area (Local)</a>	HOC__Program_Area_Local__c	HOC	Picklist	Client Administrator, 7/8/2010 6:33 PM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Registration Deadline</a>	HOC__Registration_Deadline__c	HOC	Number(18, 0)	Client Administrator, 7/8/2010 6:33 PM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Registration Start Date</a>	HOC__Registration_Start_Date__c	HOC	Date	Client Administrator, 7/8/2010 6:33 PM	<input type="checkbox"/>

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

Volunteer Opportunity Custom Field

**Program Area (Local) (Managed)** [Help for this Page](#)

[Back to Volunteer Opportunity](#)

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

[Validation Rules \(0\)](#)

**Custom Field Definition Detail** [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

---

**Field Information**

Field Label	Program Area (Local)	Object Name	<a href="#">Volunteer Opportunity</a>
Field Name	Program_Area_Local	Data Type	Picklist
Namespace Prefix	HOC		
API Name	HOC__Program_Area_Local__c		
Description			
Help Text			
Created By	<a href="#">Client Administrator</a> , 7/8/2010 6:33 PM	Modified By	<a href="#">Client Administrator</a> , 7/8/2010 6:33 PM

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**Package Information**

Installed Package	<a href="#">HOC</a>	Available in Versions	1.0 - Current
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**Picklist Options**

Controlling Field	<a href="#">New</a>
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---

**Field Dependencies** [New](#) [Field Dependencies Help](#)

No dependencies defined.

---

**Validation Rules** [New](#) [Validation Rules Help](#)

No validation rules defined.

---

**Picklist Values** [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Picklist Values Help](#)

Action	Values	Default	Chart Colors	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	None	<input type="checkbox"/>	Assigned dynamically	<a href="#">Client Administrator</a> , 7/8/2010 6:33 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Flex Program	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 9/7/2010 2:21 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Teamworks	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 8/5/2010 10:38 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Employee Volunteer Program	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 9/7/2010 2:20 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Youth Programming	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 9/7/2010 2:20 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Disaster Preparation	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 9/7/2010 2:21 PM

💡 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

Add Picklist Values

Program Area (Local)

Add one or more picklist values below. Each value should be on its own line.

Neighborhood Watch

Teen Challenge

Save

Cancel

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				
<div> <div>New</div> <div>Reorder</div> <div>Replace</div> <div>Printable View</div> <div>Chart Colors</div> </div>				
Action	Values	Default	Chart Colors	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	None	<input type="checkbox"/>	Assigned dynamically	<a href="#">Client Administrator</a> , 7/8/2010 6:33 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Flex Program	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 9/7/2010 2:21 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Teamworks	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 8/5/2010 10:38 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Employee Volunteer Program	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 9/7/2010 2:20 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Youth Programming	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 9/7/2010 2:20 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Disaster Preparation	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 9/7/2010 2:21 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Neighborhood Watch	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 12/13/2010 6:23 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Teen Challenge	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 12/13/2010 6:23 PM

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

## Set the Order of the picklist

Picklist Edit  
**Program Area (Local)**

Select a value and use the arrows to change its placement in the list. Choose a value as the default value for this picklist.

**Sort Picklist Values**

**Values**

None  
Flex Program  
Teamworks  
Employee Volunteer Program  
Youth Programming  
Disaster Preparation  
Neighborhood Watch  
Teen Challenge

Top  
Up  
Down  
Bottom

Default Value: None

☐ Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

Save Cancel

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				
<div>New Reorder Replace Printable View Chart Colors</div>				
Action	Values	Default	Chart Colors	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	None	✓	Assigned dynamically	<a href="#">Larry Deckel</a> , 12/13/2010 6:26 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Flex Program	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 9/7/2010 2:21 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Teamworks	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 8/5/2010 10:38 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Employee Volunteer Program	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 9/7/2010 2:20 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Youth Programming	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 9/7/2010 2:20 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Disaster Preparation	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 9/7/2010 2:21 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Teen Challenge	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 12/13/2010 6:26 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Neighborhood Watch	<input type="checkbox"/>	Assigned dynamically	<a href="#">Larry Deckel</a> , 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.

**Replace**

Exact Value Changing From

Neighborhood Watch

Replace all blank values

☐

Select Value Changing To

None

Replace

Cancel

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

Replace Picklist Confirmation

Program Area (Local)

Use this page to globally replace an existing value in a picklist with a new value. Make sure that you have created the new value in the picklist edit page. Note that replacing an existing picklist value will also change the Modified By date and time for the record.

You have replaced Neighborhood Watch to None in 0 record(s), possibly including records in the recycle bin.

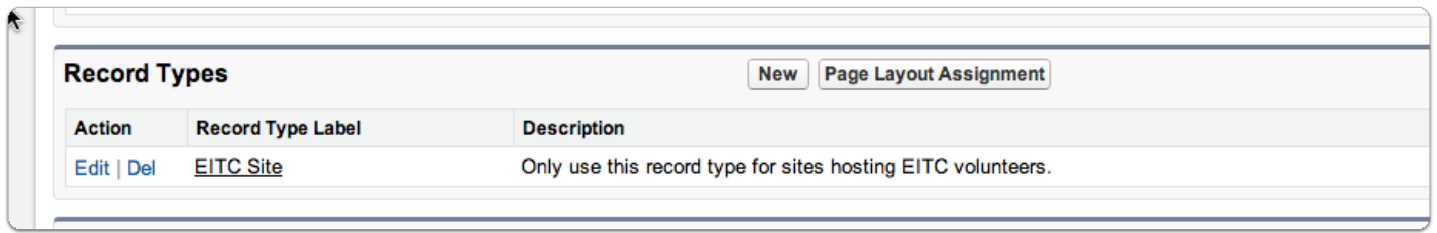
Finished

[Help for this Page](#)

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.**



Record Types			New	Page Layout Assignment
Action	Record Type Label	Description		
<a href="#">Edit</a>   <a href="#">Del</a>	EITC Site	Only use this record type for sites hosting EITC volunteers.		

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			
<a href="#">New</a> <a href="#">Reorder</a> <a href="#">Replace</a> <a href="#">Printable View</a>			
Action	Values	Default	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	Accepts Donated Goods	<input type="checkbox"/>	<a href="#">Larry Deckel</a> , 2/11/2011 7:18 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Employee Gift Matching Program	<input type="checkbox"/>	<a href="#">Larry Deckel</a> , 2/11/2011 7:17 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Food - Catering	<input type="checkbox"/>	<a href="#">Larry Deckel</a> , 2/11/2011 7:17 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Food - Coffee	<input type="checkbox"/>	<a href="#">Larry Deckel</a> , 2/11/2011 7:17 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Food - Special Event	<input type="checkbox"/>	<a href="#">Larry Deckel</a> , 2/11/2011 7:09 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Media - Newspaper	<input type="checkbox"/>	<a href="#">Larry Deckel</a> , 2/11/2011 7:17 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Media - Radio	<input type="checkbox"/>	<a href="#">Larry Deckel</a> , 2/11/2011 7:17 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Media -TV	<input type="checkbox"/>	<a href="#">Larry Deckel</a> , 2/11/2011 7:17 PM

[^ Back To Top](#) 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

**Account Record Type**

Use this page to create and maintain record types for your organization. You can display different page layouts and picklist values based on record types.

To use record types, add the Record Type field to your [page layouts](#).

Action	Record Type Label	Installed Package	Description	Active	Modified By
<a href="#">Edit</a> →	<a href="#">Business</a>	HOC	This record type is to be used to identify all for-profit organizations.	✓	Client Administrator, 7/8/2010 6:33 PM
<a href="#">Edit</a> →	<a href="#">Individual</a>	HOC	This record type is only to be used for the "Individual" Organization record and should not be edited or removed.	✗	Art Ordoqui, 11/29/2010 12:30 PM
<a href="#">Edit</a> →	<a href="#">Nonprofit</a>	HOC	This record type is to be used to identify all nonprofit organizations.	✓	Client Administrator, 7/8/2010 6:33 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Test</a>			✓	HandsOn Connect Admin, 9/24/2010 10:00 AM

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 [Help](#)

## Business (Managed)

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	<a href="#">HOC</a>		
Description	This record type is to be used to identify all for-profit organizations.		
Created By	<a href="#">Client Administrator</a> , 7/8/2010 6:33 PM	Modified By	<a href="#">Client Administrator</a> , 7/8/2010 6:33 PM

Picklists Available for Editing			Picklists Available for I
Action	Field	Modified Date	
<a href="#">Edit</a>	Address Visibility	7/8/2010 6:33 PM	
<a href="#">Edit</a>	Age Groups Served	7/8/2010 6:33 PM	
<a href="#">Edit</a>	Genders Served	7/8/2010 6:33 PM	
<a href="#">Edit</a>	Goods and Services	7/8/2010 6:33 PM	
<a href="#">Edit</a>	Impact Area	7/8/2010 6:33 PM	
<a href="#">Edit</a>	Industry	7/8/2010 6:33 PM	
<a href="#">Edit</a>	Ownership	7/8/2010 6:33 PM	
<a href="#">Edit</a>	Populations Served	7/8/2010 6:33 PM	
<a href="#">Edit</a>	Primary Address?	7/8/2010 6:33 PM	
<a href="#">Edit</a>	Rating	7/8/2010 6:33 PM	
<a href="#">Edit</a>	Status	7/8/2010 6:33 PM	
<a href="#">Edit</a>	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)**

Record Type Edit

[Help for this Page](#)

## Goods and Services

**General Properties**

Field Label	Goods and Services
Record Type	Business

**Picklist Values**

Select an item from the Available Values list and add it to the Selected Values list to include it as a picklist value for this Record Type. Note that removing an item from the picklist does not remove it from any existing records. Finally, select a default picklist value for this Record Type.

**Available Values**

Accepts Donated Goods

Add

Remove

**Selected Values**

Employee Gift Matching Program  
Food - Catering  
Food - Coffee  
Food - Special Event  
Media - Newspaper  
Media - Radio  
Media -TV

Default: --None--

Save Cancel

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**?

**Contact Fields**

This page allows you to specify the fields that can appear on the Contact page. You can create up to 500 Contact custom fields.  
Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rules that rely on the custom field data.

[Set History Tracking](#)

**Contact Standard Fields**

Action	Field Label	Field Name	Data Type	Controlling Field
Edit	Account Name	Account	Lookup(Account)	
Edit	Allow Customer Portal Self-Registration	CanAllowPortalSelfReg	Checkbox	
Edit	Assistant	AssistantName	Text(40)	
Edit	Asst. Phone	AssistantPhone	Phone	
Edit	Birthdate	Birthdate	Date	
Edit	Contact Owner	Owner	Lookup(User)	
Edit	Contact Record Type	RecordType	Record Type	
Edit	Created By	CreatedBy	Lookup(User)	
Edit	Department	Department	Text(80)	
Edit	Description	Description	Long Text Area(32000)	
Edit	Do Not Call	DoNotCall	Checkbox	
Edit	Email	Email	Email	
Edit	Email Opt Out	HasOptedOutOfEmail	Checkbox	
Edit	Fax	Fax	Fax	
Edit	Fax Opt Out	HasOptedOutOfFax	Checkbox	
Edit	Home Phone	HomePhone	Phone	
Edit	Last Modified By	LastModifiedBy	Lookup(User)	
Edit	Last Stay-in-Touch Request Date	LastCURequestDate	Date/Time	
Edit	Last Stay-in-Touch Save Date	LastCUUpdateDate	Date/Time	
Replace   Edit	Lead Source	LeadSource	Picklist	
Edit	Mailing Address	MailingAddress	Address	
Edit	Mobile	MobilePhone	Phone	
Edit   Replace	Name	Name	Name	
	Salutation	Picklist		
	First Name	Text(40)		
	Last Name	Text(80)		
	Other Address	OtherAddress	Address	
Edit	Other Phone	OtherPhone	Phone	
Edit	Phone	Phone	Phone	
Edit	Reports To	ReportsTo	Lookup(Contact)	
Edit	Title	Title	Text(80)	

**Contact Custom Fields & Relationships**

[New](#) [Field Dependencies](#)

Action	Field Label	API Name	Installed Package	Data Type	Controlling Field	Modified By
Edit	Accepts Invitations	HOC__Accepts_Invitations__c	HOC	Checkbox		Client Administrator, 7/8/2010 6:33 PM

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

Contact  
New Custom Field Help for this Page

Step 1. Choose the field type Step 1

Next Cancel

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

**Data Type**

☒ None Selected Select one of the data types below.

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

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

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

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

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

☐ Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

☐ Date Allows users to enter a date or pick a date from a popup calendar.

☐ Date/Time Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, that date and the current time are entered into the Date/Time field.

☐ Email Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

☐ Number Allows users to enter any number. Leading zeros are removed.

☐ Percent Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

☐ Phone Allows users to enter any phone number. Automatically formats it as a phone number.

☒ Picklist ← Allows users to select a value from a list you define.

☐ Picklist (Multi-Select) Allows users to select multiple values from a list you define.

☐ Text Allows users to enter any combination of letters and numbers.

☐ Text Area Allows users to enter up to 255 characters on separate lines.

☐ Text Area (Long) Allows users to enter up to 32000 characters on separate lines.

☐ Text Area (Rich) Allows users to enter formatted text, add images and links. Up to 32000 characters on separate lines.

☐ URL Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

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.

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label  ?

Please enter the list of values for the picklist field below. Each value should be separated by a new line.

Medium  
Large  
X-Large  
XX-Large

☐ Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

☐ Use first value as default value

Field Name  ?

Description

Help Text  ?

Previous Next Cancel

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	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Contract Manager	<input type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager	<input type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Custom	<input type="checkbox"/>	<input type="checkbox"/>
Customer Portal User	<input type="checkbox"/>	<input type="checkbox"/>
Force.com - One App User	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
HOC Platform	<input type="checkbox"/>	<input type="checkbox"/>
HOC Platform Staff	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>	<input type="checkbox"/>
Overage Customer Portal Manager Custom	<input type="checkbox"/>	<input type="checkbox"/>
Partner Staff	<input type="checkbox"/>	<input type="checkbox"/>
Partner Staff Named User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard Platform User	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	<input type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Volunteer Leader	<input type="checkbox"/>	<input type="checkbox"/>

There are a LOT of standard Salesforce profiles that will appear in this list, so it 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 made Staff able to see the field, but NOT to edit it.

## Step 4: Add to page layouts

Contact  
New Custom Field

Help for this Page 

Step 4. Add to page layouts

Step 4 of 4

Previous

Save & New

Save

Cancel

Field Label	T-Shirt Size
Data Type	Picklist
Field Name	T_Shirt_Size
Description	

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

To change the location of this field on the page, you will need to customize the page layout. To change the values that appear, you will need to customize the Record Types.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Admin Contact Layout(Volunteer)
<input checked="" type="checkbox"/>	Contact Layout
<input checked="" type="checkbox"/>	Partner Staff Contact Layout(Volunteer)
<input checked="" type="checkbox"/>	Staff Contact Layout(Volunteer)
<input checked="" type="checkbox"/>	VL Contact Layout(Volunteer)

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

Previous

Save & New

Save

Cancel

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 2. Choose output type

Step 2 of 5

Previous

Next

Cancel

Field Label

Opportunity Coordinator C

Field Name

Opportunity\_Coordinator\_C

Formula Return Type

None Selected

Select one of the data types below.

Currency

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

Date

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

Date/Time

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

Number

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

Percent

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

Text

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

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

Opportunity Coordinator Contact Info (Text) =

```

1 "Email: " + HOC__Opportunity_Coordinator__r.Email + " " + BR() +
2 "Primary Phone: " + TEXT(HOC__Opportunity_Coordinator__r.HOC__Primary_Phone__c) + BR() +
3 "Home Phone: " + HOC__Opportunity_Coordinator__r.HomePhone + BR() +
4 "Business Phone: " + HOC__Opportunity_Coordinator__r.Phone + BR() +
5 "Mobile Phone: " + HOC__Opportunity_Coordinator__r.MobilePhone + BR() +
6 "Other Phone: " + HOC__Opportunity_Coordinator__r.OtherPhone

```

Use " " to designate actual text you want to appear. "Email: " will display Email:

We had to add the word TEXT so that it would pull the value that was selected in the picklist.

The " " with the space inbetween is to add a space after the email address. It is needed to prevent the email hyperlink from continuing onto the next line

The + indicates that you are adding another field, text, or command to the formula

The BR ( ) is used to force a line break in the text that is returned.

Position: , Ch 388

☒ Toggle ed

Check Synt

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.

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

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."

Step 5. Add to page layouts

Step 5 of 5

Previous

Save & New

Save

Cancel

**Field Label** Opportunity Coordinator Contact Info2

**Data Type** Formula

**Field Name** Opportunity\_Coordinator\_Contact\_Info2

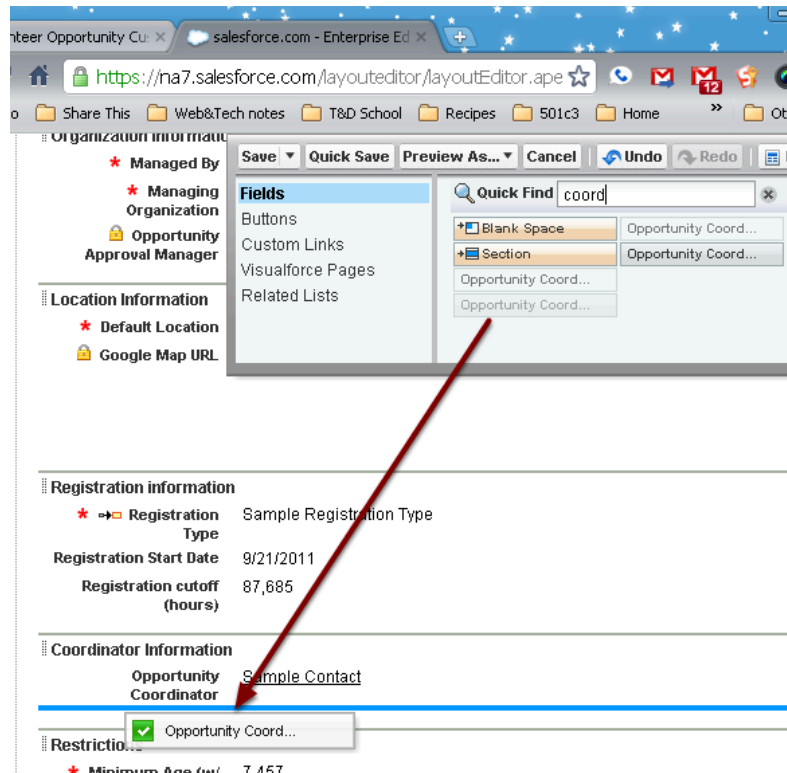
**Description**

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

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

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

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](#).



#### ▼ Coordinator Information

**Opportunity Coordinator** Tim Taylor

**Opportunity Coordinator Contact Info**  
 Email: [artohoc+timtaylor@gmail.com](mailto:artohoc+timtaylor@gmail.com)  
 Primary Phone: Business  
 Home Phone: [\(210\) 123-4567](tel:(210)123-4567)  
 Business Phone: 123-456-7890  
 Mobile Phone: (210) 338-0000  
 Other Phone: (706) 296-0000

## 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. **(This formula was created using the Advanced Formula tab in step 3)**

```
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.

**Simple Formula** **Advanced Formula**

**Insert Field** **Insert Operator**

Still need Volunteers? (Text) =

1 HOC\_\_Total\_Confirmed\_\_c IF(HOC\_\_Total\_Confirmed\_\_c<HOC\_\_Minimum\_Attendance\_\_c,1,0)

2 IF(HOC\_\_Total\_Confirmed\_\_c<HOC\_\_Maximum\_Attendance\_\_c,IMAGE("/img/sample.png"),0)

For operators like Greater than or Equal to

Functions

- All Function Categories
- ABS
- AND
- BEGINS
- BLANKVALUE
- BR
- CASE

Insert Selected Function

Use to get the field name. See below.

Additional functions with tips and formatting examples

**Insert Field**

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

Occurrence > 1

- \$Api >
- \$Label >
- \$Organization >
- \$Profile >
- \$Setup.sf4twitter\_\_Twitter\_Configuration\_\_c >
- \$Setup.sf4twitter\_\_Twitter\_Public\_Configuration\_\_c >
- \$System >
- \$User >

State/Province

Status

Still need Volunteers?

Street

Total Attended

Total Confirmed 2

Total Connections

Total Declined

Total Hours Served

You have selected:

**HOC\_\_Total\_Confirmed\_\_**

Type: Number

API Name: HOC\_\_Total\_Confirm

3 Insert

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.

Still Need Volunteers Edit | Delete | Create New View

New Occurrence Change Owner

Occurrence ID ↑	Still need Volunteers?	Volunteer Opportunity	Start Date & Time
+ OC-000223		Families Volunteering Together	9/24/2011 9:00 AM
+ OC-000224		Families Volunteering Together	10/1/2011 9:00 AM
+ OC-023355		Art Mentors	9/30/2011 11:00 AM
+ OC-023372		Franklin Canyo	25/2011 8:00 AM
+ OC-023373		Franklin Canyo	/23/2011 8:00 AM
+ OC-023374		Franklin Canyo	/27/2011 8:00 AM
+ OC-023375		Franklin Canyo	/25/2011 8:00 AM
+ OC-023398		Arts & Crafts with Kids	9/29/2011 7:00 PM
+ OC-023399		Arts & Crafts with Kids	10/13/2011 7:00 PM
+ OC-023400		Arts & Crafts with Kids	10/27/2011 7:00 PM
+ OC-023401		Arts & Crafts with Kids	11/10/2011 7:00...
+ OC-023402		Arts & Crafts with Kids	11/24/2011 7:00...
+ OC-023403		Arts & Crafts with Kids	12/8/2011 7:00 PM

This is sortable as well by color

## 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

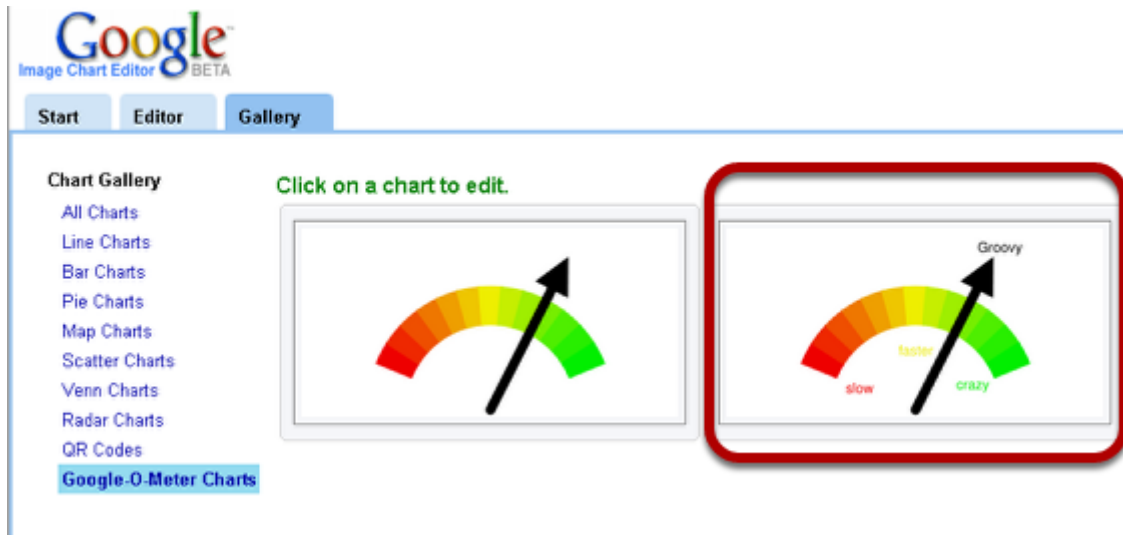
**NOTE: Google Charts: Special Notes / Limitations (As provided in the Dreamforce '11-Formula Ninjas Powerpoint; Sept 1, 2011)**

- 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)

**Data**

Encoding:   Leave as Text

[Add New Data Set](#)

**Data set 1 (Groovy)**

Size:   ☒ Visible

Scale: min  max

**Data values**

**Legend**


Data Values	Legend
<input type="text" value="70"/>	<input type="text"/>

**Label**

Data Values	Label
<input type="text" value="70"/>	<input type="text" value="70%"/>

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

**Example of the chart**



Paste link in email or IM

<http://chart.apis.google.com/chart?chxl=0:|P>

Paste **Google Chart Code:** [http://chart.apis.google.com/chart](http://chart.apis.google.com/chart?chxl=0:|P)

```
http://chart.apis.google.com/chart
?chxl=0:|Poor|Fair|Great
&chxt=y
&chs=300x150
&cht=gm
&chd=t:70
&chl=70%
&schma=0,0,5
```

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

&cht=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 ")

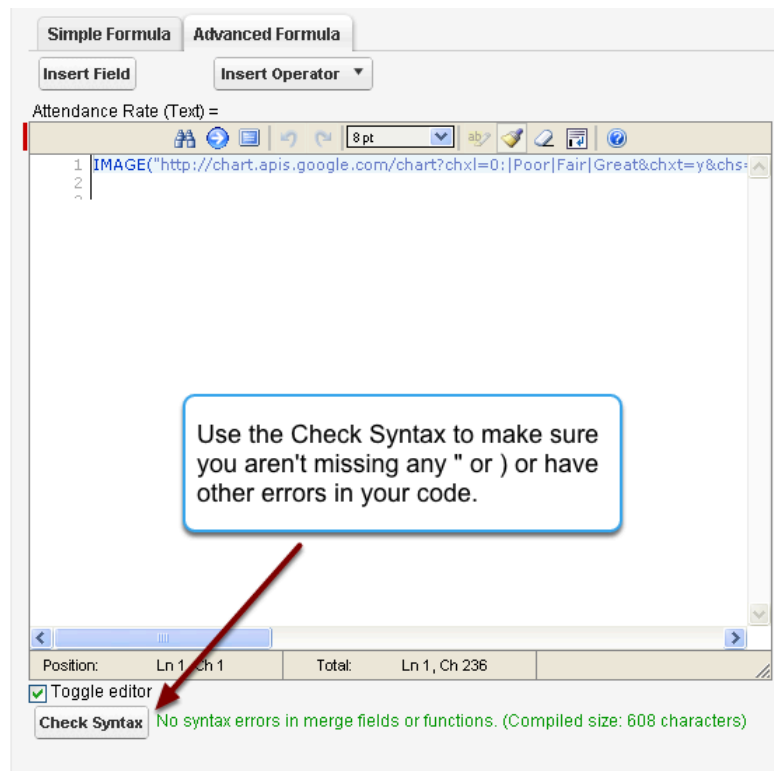
&chma=0,0,5

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\_Percentage\_\_c) + "&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.

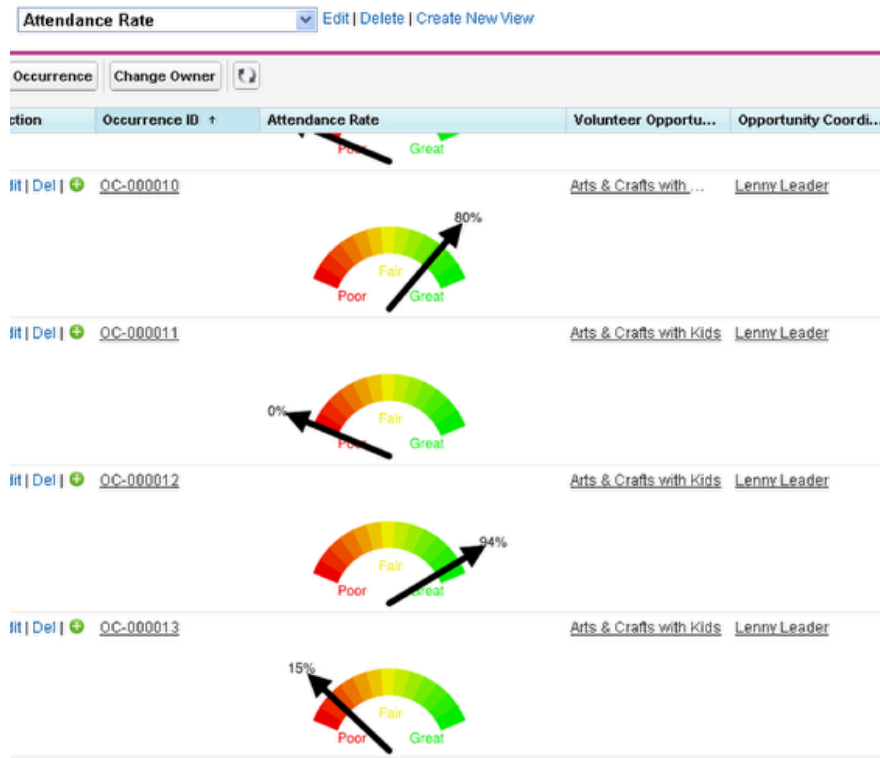
Complete Step 3 to enter the Description and Help Text.

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!**

**Personal Setup**

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

**App Setup**

- Customize
  - Tab Names and Labels
  - Home
  - Activities
  - Campaigns
  - Leads
  - Accounts
  - Contacts**
    - Fields
    - Related Lookup Filters
    - Validation Rules
    - Triggers
    - Page Layouts**
    - Search Layouts
    - Buttons and Links
    - Record Types

**Contact Page Layout**

This page allows you to create different page layouts to display Contact data.  
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

**Contact Page Layouts** [New] [Page Layout Assignment]

Action	Page Layout Name	Installed Package	Created By	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Admin Contact Layout(Volunteer)</a>	HOC	<a href="#">Client Administrator</a> , 7/8/2010 6:33 PM	<a href="#">Larry Deckel</a> , 12/13/2010 7:15 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Contact Layout</a>	HOC	<a href="#">Staff Training Profile</a> , 7/8/2010 6:33 PM	<a href="#">Larry Deckel</a> , 12/13/2010 7:15 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Partner Staff Contact Layout(Volunteer)</a>	HOC	<a href="#">Client Administrator</a> , 7/8/2010 6:33 PM	<a href="#">Larry Deckel</a> , 12/13/2010 7:15 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Staff Contact Layout(Volunteer)</a>	HOC	<a href="#">Client Administrator</a> , 7/8/2010 6:33 PM	<a href="#">Larry Deckel</a> , 12/13/2010 7:15 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">VL Contact Layout(Volunteer)</a>	HOC	<a href="#">Client Administrator</a> , 7/8/2010 6:33 PM	<a href="#">Larry Deckel</a> , 12/13/2010 7:15 PM

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.

**In 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

The screenshot shows the Salesforce Setup interface for the 'Contact' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts (highlighted), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Page Layouts' and shows a list of 6 items, sorted by Page Layout Name. The list includes: 'Copy of HOC 3.1 Contact (Custom)', 'HOC 3.1 Contact Layout', 'HOC 3.1 Contact Layout', 'HOC 3.1 Contact Layout (Advanced)', 'HOC 3.1 Contact Layout (Advanced)', and 'HOC 3.1 Contact Layout - NPSP'. Each item has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. A 'Quick Find' search bar is at the top right, along with 'New' and 'Page Layout Assignment' buttons. A right arrow icon is visible next to each layout name.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Copy of HOC 3.1 Contact (Custom)	9015 HOC Admin, 7/11/2018, 11:15 AM	9015 HOC Admin, 10/26/2018, 12:21 PM
HOC 3.1 Contact Layout		
HOC 3.1 Contact Layout	HOC DOT, 12/21/2017, 11:47 AM	9015 HOC Admin, 11/9/2018, 2:29 PM
HOC 3.1 Contact Layout (Advanced)		
HOC 3.1 Contact Layout (Advanced)	9015 HOC Admin, 12/21/2017, 11:47 AM	9015 HOC Admin, 11/9/2018, 2:29 PM
HOC 3.1 Contact Layout - NPSP	9015 HOC Admin, 12/21/2017, 11:47 AM	9015 HOC Admin, 11/9/2018, 2:30 PM

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.

This screenshot is similar to the previous one, but the 'Page Layout Assignment' button in the top right corner is highlighted with a red rectangle. The rest of the interface, including the sidebar and the list of page layouts, remains the same.

Edit Assignment		
Profiles	Record Types (1-2 of 2)	
	Master	Volunteer
Contract Manager	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Customer Portal Manager	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Customer Portal Manager Custom	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Customer Portal User	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Force.com - One App User	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Gold Partner User	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
HOC Platform	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">Copy of HOC 3.1 Contact (Custom)</a>
HOC Platform Staff	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">Copy of HOC 3.1 Contact (Custom)</a>
Marketing User	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Overage Customer Portal Manager Custom	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Partner Staff	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Partner Staff Named User	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Read Only	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Solution Manager	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Staff	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Standard Platform User	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Standard User	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
System Administrator	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">Copy of HOC 3.1 Contact (Custom)</a>
Volunteer Leader	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>
Volunteer Leader Named User	<a href="#">HOC 3.1 Contact Layout</a>	<a href="#">HOC 3.1 Contact Layout</a>

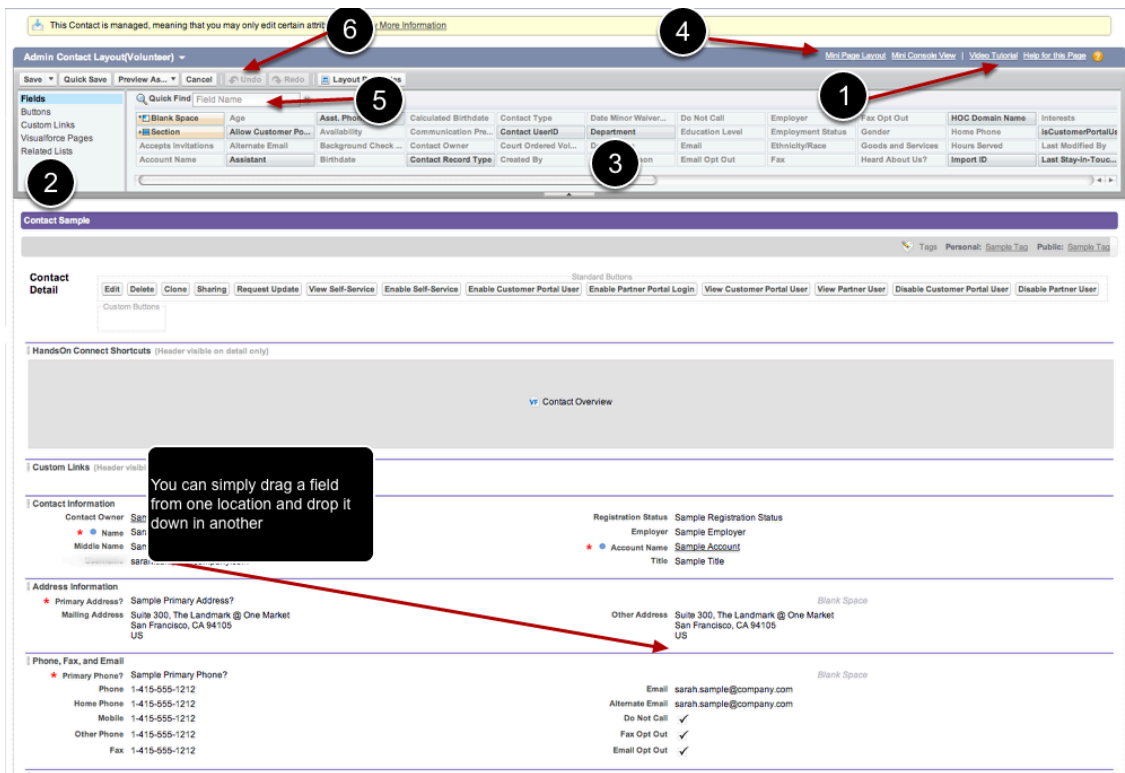
In the example above, the Contact Volunteer Record Type, has the page layout "Copy of HOC 3.1 Contact (custom)" assigned to the System Administrator, and the "HOC 3.1 Contact Layout" assigned to the Staff Profile.

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 editor.



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.

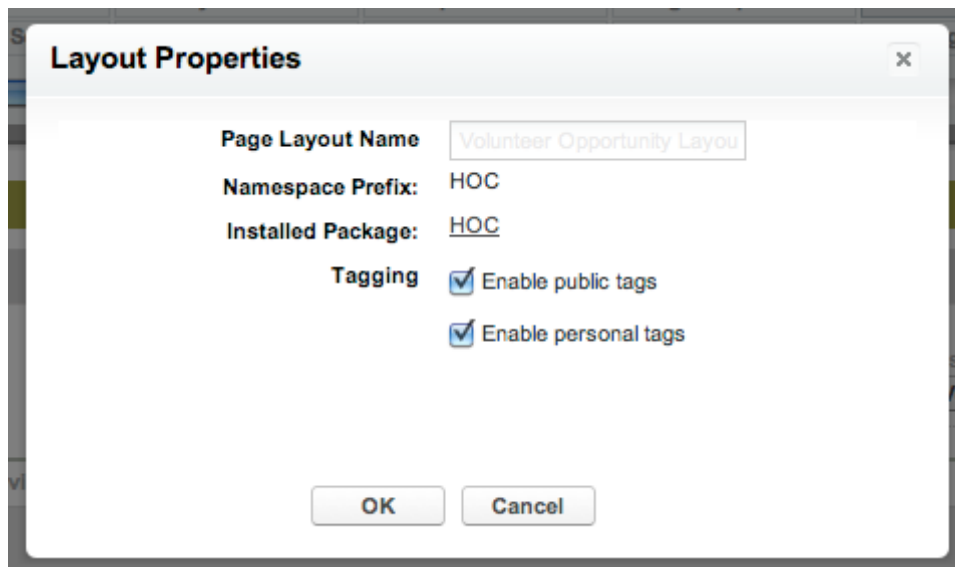
4. The Mini-Page Layout determines the pop-up hover fields that show up when this object is displayed as a lookup in another record type.

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.

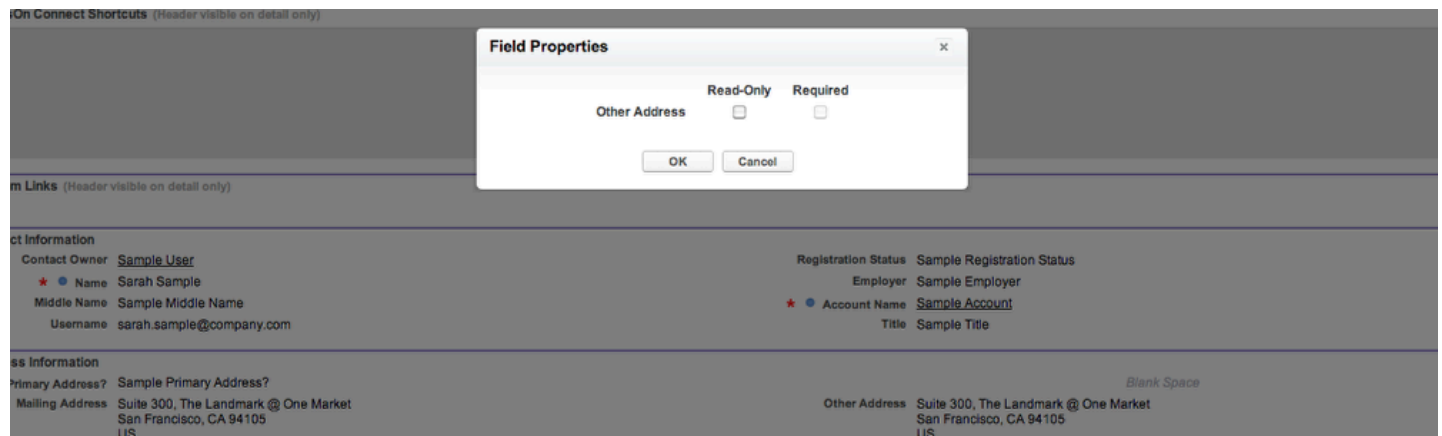
Mobile & Lightning Actions determine the actions available when using Lightning.

## Working with Fields in the layout



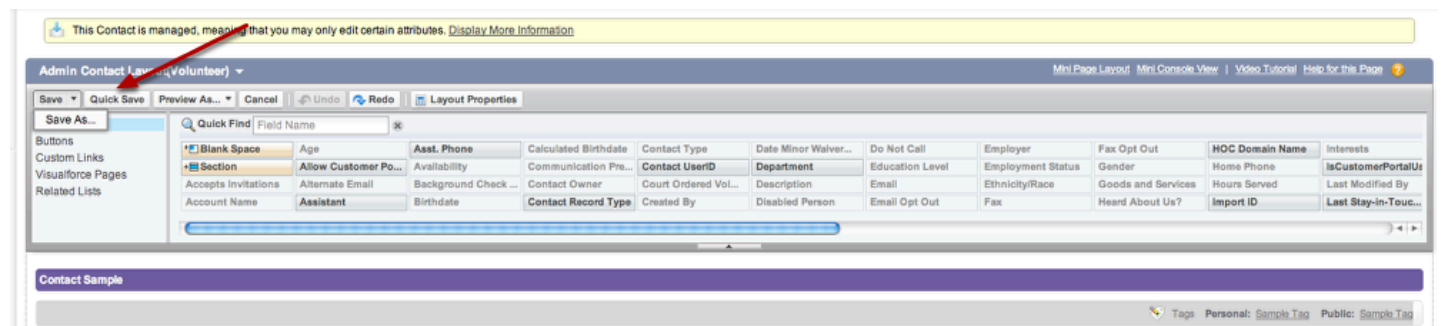
Each field in the layout has an 'x' icon which quickly removes an object from the page layout. Or you can drag it back into the field tray.

## Clicking on the wrench icon allows you to set field properties



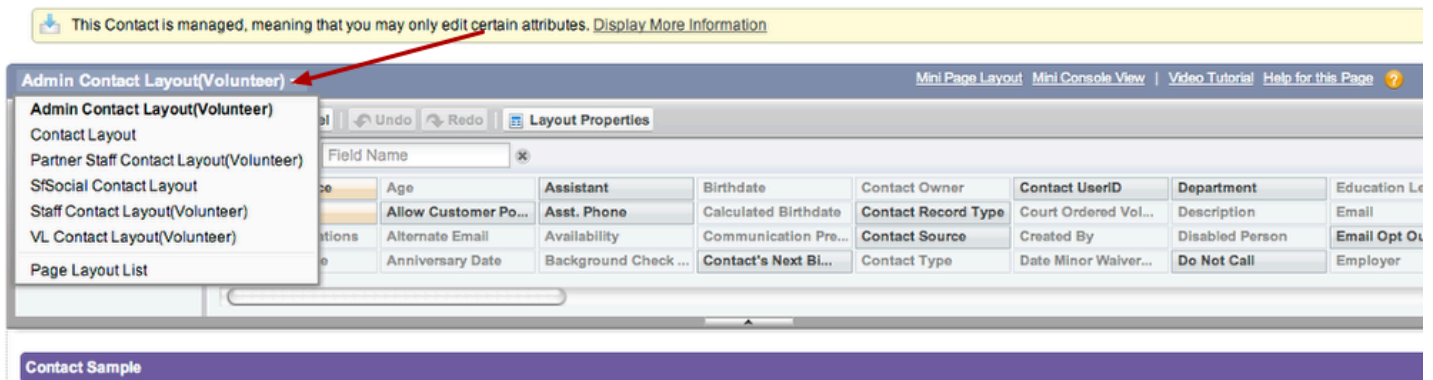
You can make a field READ ONLY for that layout, or a REQUIRED field.

## 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

A screenshot of the 'Section Properties' dialog box. It has a title bar with a close button. Inside, there's a 'Section Name' field with 'Information' entered. Below that, 'Display Section Header On' has two checked checkboxes: 'Detail Page' and 'Edit Page'. There are two main sections: 'Layout' and 'Tab-key Order'. The 'Layout' section has two options: '1-Column' (radio button) and '2-Column' (radio button, which is selected). The 'Tab-key Order' section has two options: 'Left-Right' (radio button) and 'Top-Down' (radio button, which is selected). At the bottom, there are 'OK' and 'Cancel' buttons.

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!

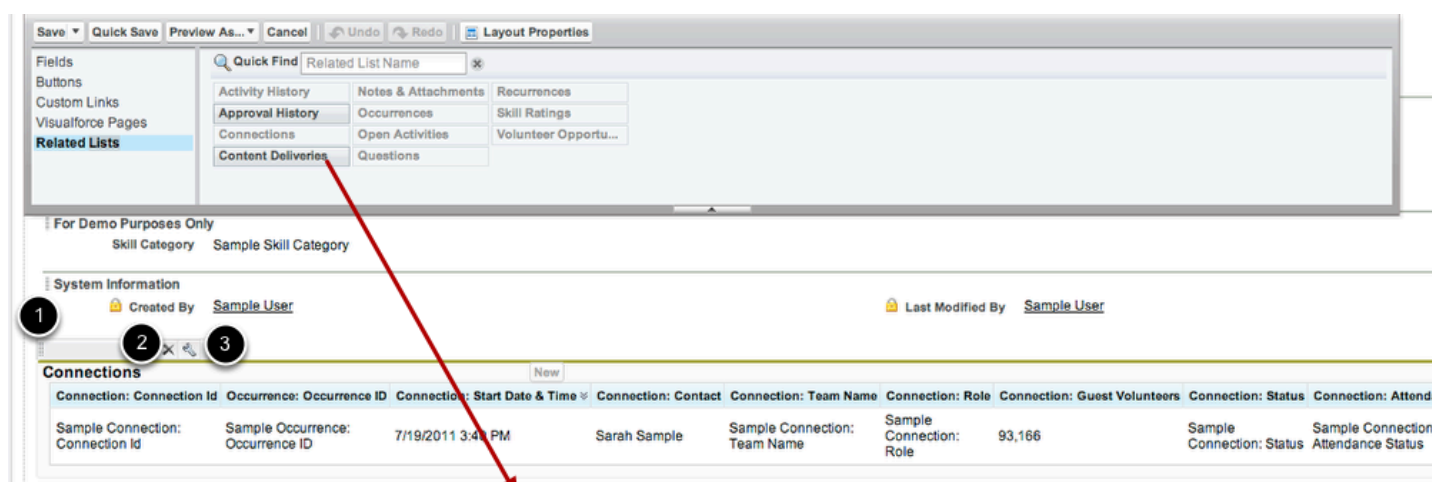
1. Create a new section with the name you want to use
2. Drag it onto the layout
3. Drag the fields from the managed section, to your new one.
4. Remove the old section from the layout!

# 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.

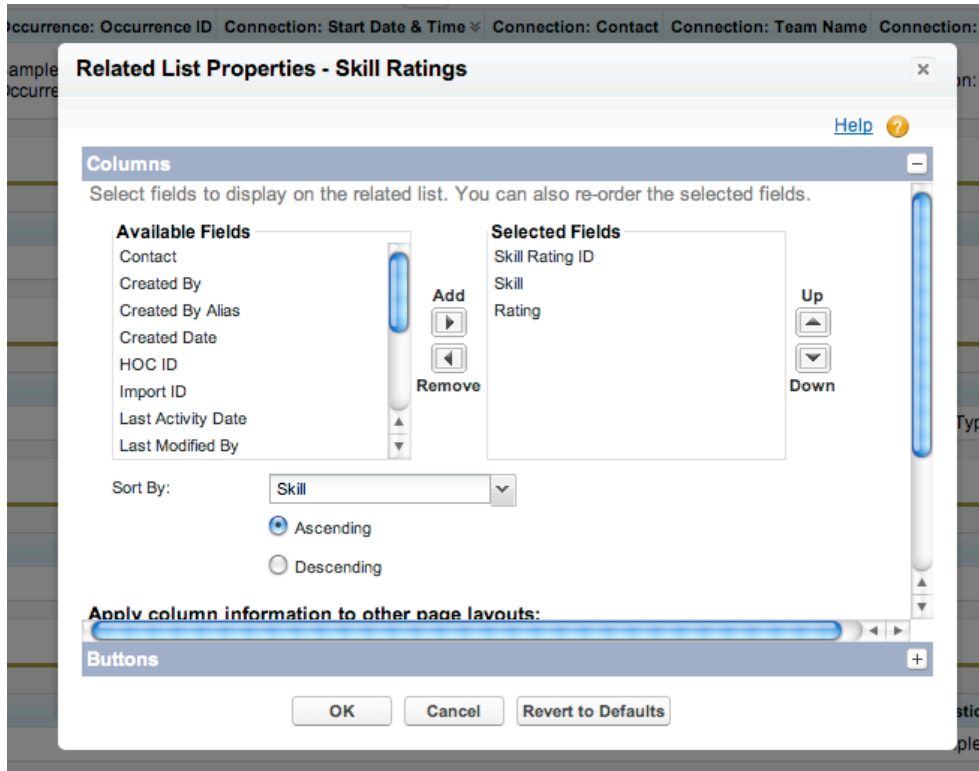
## Adding or Deleting Related Lists to page layouts



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!

**Related List Properties - Skill Ratings**

[Help](#) ?

**Columns** -

HOC ID		
Import ID	Remove	Down
Last Activity Date		
Last Modified By		

Sort By: Skill

☒ Ascending  
☐ Descending

**Apply column information to other page layouts:**

☒ Select All  
☒ Partner Staff Volunteer Opportunity Layout  
☒ Staff Volunteer Opportunity Layout  
☒ VL Volunteer Opportunity Layout

**Buttons** +

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

**Related List Properties - Skill Ratings**

[Help](#) ?

**Columns** +

**Buttons** -

**Standard Buttons:**  
Select standard buttons to display on the related list.

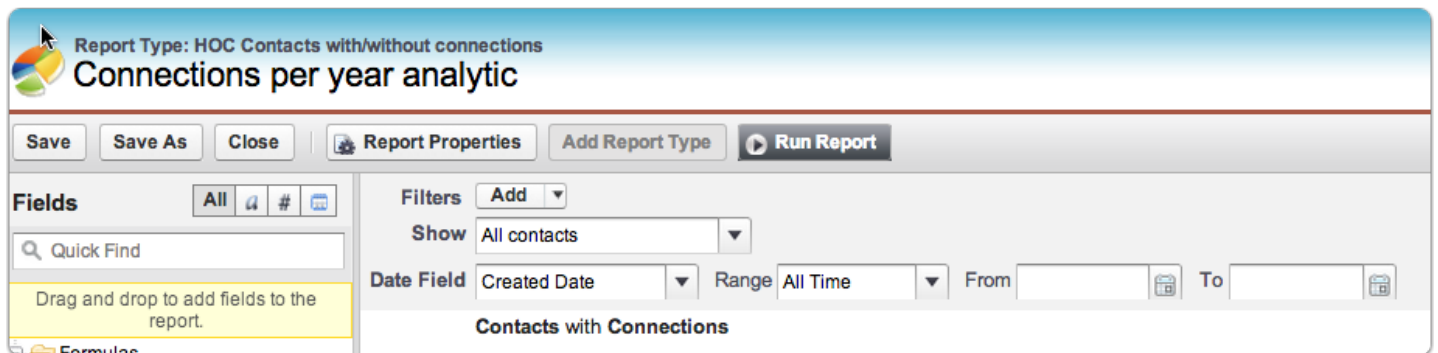
☒ New

# 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:

Preview

Summary Format

Show

Remove All Columns

Full Name	Connection Id	Number of Connections	Connections: Hours Served
Connection: Start Date & Time: CY2003 (1 Record)			
		1	0.00
Drop a field here to create a grouping. Hide			
Kassi Cornell	CO-017207	1	0.00

Fields:

Full name

Connection ID

Number of Connections: (and I summarized on this field to give me the sum of the connections)

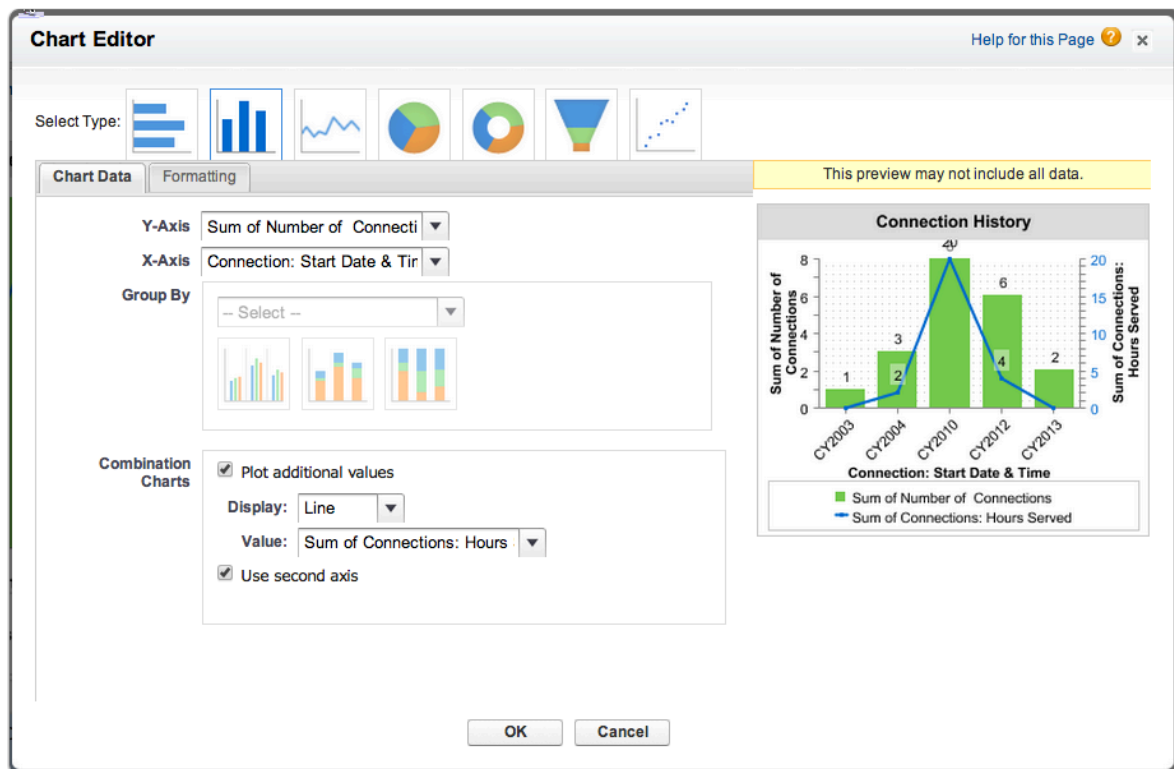
Hours Served: (and I summarize on this field to give me the sum of the hours)

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](#).

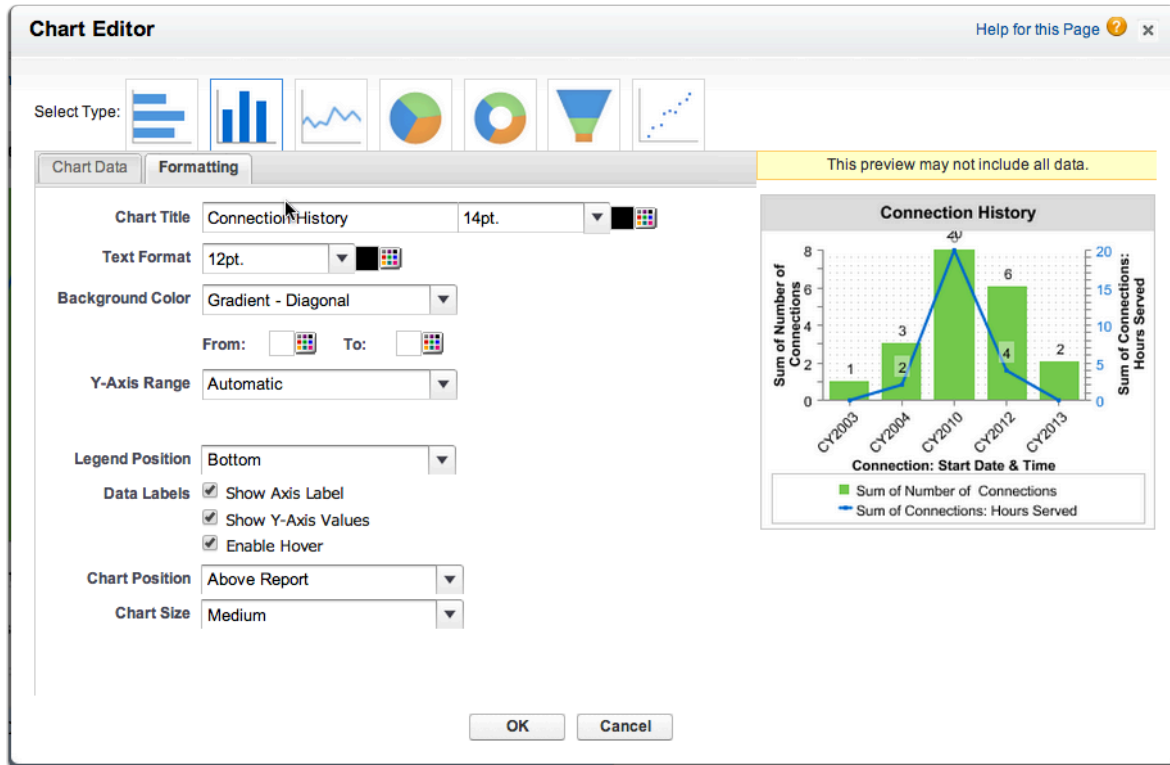
## Add a chart to the report:



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.

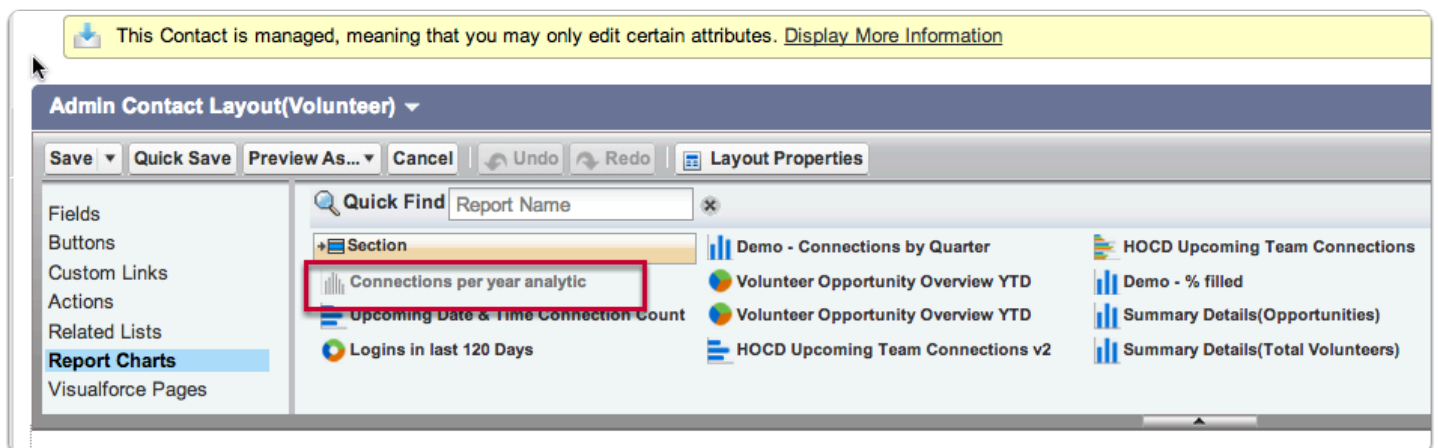
## Formatting for this chart:



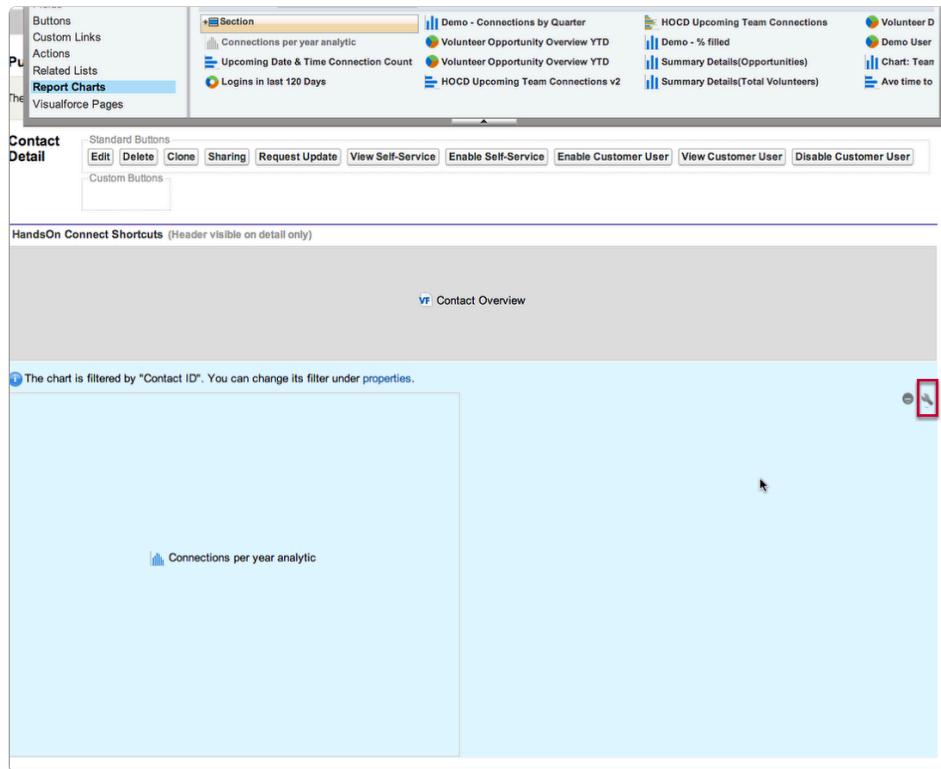
Save your finished report, and place in a folder that is accessible to the profiles you will want to be able to see this report and its chart.

(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:

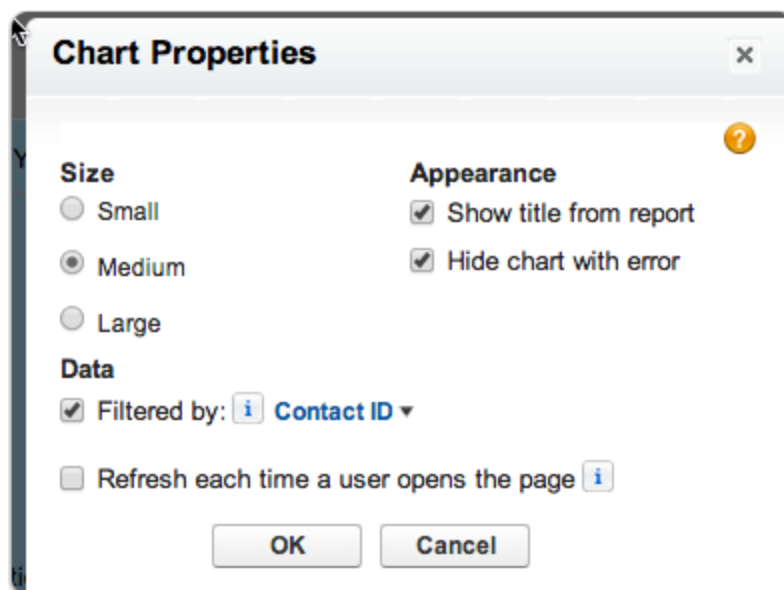


Click on "Report Charts" in the page layout selector - and select the chart you wish to add to the page layout. Then drag the report onto the layout wherever you want it to appear. (You can create a new section for it, or place it right below the HandsOn Connect Shortcuts 'contact overview' component).)



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

## Set the properties for the chart



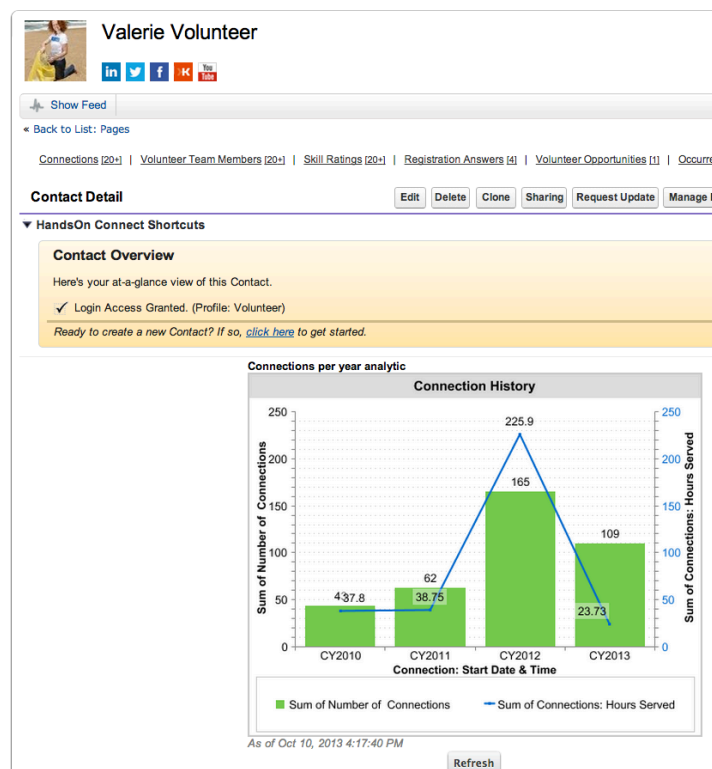
You can set the size and appearance of the chart.

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

Organization Served [Troutco](#)

Organization Served URL [http://den...](#)

Street	3649 Mis
City	Riverside
State/Province	CA
Zip/Postal Code	92506
Country	

**Organization** [View](#) [Edit](#)

Organization Name	Troutco <a href="#">View Hierarchy</a>
Phone	(951) 123-4533
Parent Organization	
Status	Active Partner
Primary Address?	Billing
Address Visibility	City and Zip only

## Hover view of recent items in the left sidebar

**Recent Items**

- [HandsOn Connect](#)
- [Facebook Log 2011-06-01 18:25:29:0827 -0400](#)
- [OC-000034](#)
- [Reading to Kids](#) **[Alt+3]**
- [OC-025188](#)
- [Valerie Volunteer](#)
- [Phil Philanthropist](#)
- [Delta Airlines](#)
- [HandsOn Connect Admin 9999](#)

**Occurrence** [View](#) [Edit](#)

Volunteer Opportunity	<a href="#">Food Sorting for AIDS Project</a>
Location	<a href="#">Troutco Building</a>
Status	Active

[Cedar Sinai Park Cleanup](#) [Park f](#)

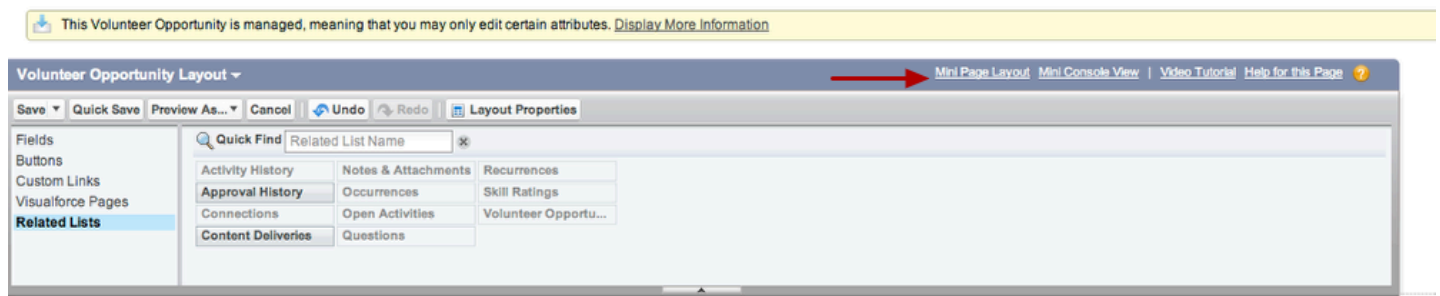
[National Trails Day](#) [Fort M](#)

[Committee](#) [330](#)

[School Supplies for Kids](#) [Scho](#)

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'

Mini Page Layout

### Volunteer Opportunity Layout

This page allows you to choose the fields and related lists that will display in the mini view of the console.

Save Cancel

**Fields**

Available		Selected
Activity Type	Add Remove	Volunteer Opportunity Name
Background Check Required		Status
City		Type
Country		Schedule Type
Court Ordered Allowed		Start Date
Created By		End Date
Description		Managed By
Google Map URL		Managing Organization
Guest Volunteer Hours Served		Organization Served
Guest Volunteers Attended		Default Location
HON Signature Initiatives		Registration Type
Impact Area (Local)		Maximum Attendance
Invitation Code		Minimum Age (w/ adult)
		Minimum Age

**Related Lists**

- ☐ Connections
- ☐ Occurrences
- ☐ Recurrences
- ☐ Skill Ratings
- ☐ Questions
- ☐ Open Activities
- ☐ Activity History
- ☐ Notes & Attachments
- ☐ Volunteer Opportunity History

Save Cancel

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**

The image shows a Salesforce form and a lookup window. The form has three main sections: Coordinator information, Registration Information, and Time/Date Information. The lookup window is titled 'Lookup' and shows search results for 'Art Trout'.

**Coordinator information**

Opportunity Coordinator: Art Trout

**Registration Information**

Registration Start Date: [7/19/2011]

Registration cutoff (hours): 2

**Time/Date Information**

Start Date & Time: 7/19/2011 4:00 PM [7/19]

Days & Times Needed: Available, Sunday Morning, Sunday Afternoon, Sunday Evening

**Lookup Window**

Search: Art Trout Go! New

You can use "\*" as a wildcard next to other characters to improve your search.

< Clear Search Results

**Search Results**

Name	Organization Name
Art Trout	Troutco

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

The screenshot shows the 'App Setup' sidebar on the left with the 'Search Layouts' option highlighted. A red arrow points to this option. Another red arrow points to the 'Edit' link for 'Lookup Dialogs' in the 'Contact Search Layouts' table on the right.

Action	Layout	Columns Displayed
<a href="#">Edit</a>	Search Results	Name, Account Name, Account Site, Phone, Email, Contact Owner Alias
<a href="#">Edit</a>	Lookup Dialogs	Name, Account Name, Account Site
<a href="#">Edit</a>	Lookup Phone Dialogs	Name, Account Name, Account Site, Phone, Mobile, Home Phone, Other Phone, Asst. Phone, Primary Phone
<a href="#">Edit</a>	Contacts Tab	Name, Account Name, Phone
<a href="#">Edit</a>	Contacts List View	N/A
<a href="#">Edit</a>	Search Filter Fields	

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

Edit Search Layout

### Contact Lookup Dialogs

Select the fields to include in this search layout. Note that your choices only determine the display

The dialog shows two columns: 'Available Fields' and 'Selected Fields'. The 'Available Fields' list includes: Primary Address?, Primary City, Primary Phone, Primary Phone?, Primary State, Primary Street, Primary Zip, Profile Name, Project Name, Registration Status, and Research This Contact. The 'Selected Fields' list includes: Name, Account Name, and Account Site. There are 'Add' and 'Remove' buttons between the lists, and 'Up' and 'Down' buttons next to the 'Selected Fields' list. 'Save' and 'Cancel' buttons are at the bottom right.

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!

The image shows a screenshot of the HandsOnConnect system administrator interface on the left and a Salesforce lookup window on the right. The HandsOnConnect form has three sections: 'Coordinator information' with a text field for 'Opportunity Coordinator' containing 'Art Trout'; 'Registration Information' with 'Registration Start Date' set to '7/19/2011' and 'Registration cutoff (hours)' set to '2'; and 'Time/Date Information' with 'Start Date & Time' set to '7/19/2011 4:00 PM' and a dropdown for 'Days & Times Needed' showing 'Available', 'Sunday Morning', 'Sunday Afternoon', and 'Sunday Evening'. The Salesforce lookup window is titled 'Lookup' and shows a search for 'Art Trout' with 'Go!' and 'New' buttons. Below the search bar, it says 'You can use "\*" as a wildcard next to other characters to improve your search results.' The search results are displayed in a table with columns 'Name', 'Organization Name', and 'Profile Name'. The results show 'Art Trout' as the Name, 'Troutco' as the Organization Name, and 'Partner Staff' as the Profile Name. A link '< Clear Search Results' is visible above the table. The footer of the Salesforce window reads 'Copyright © 2000-2011 salesforce.com, inc. All rights reserved.'

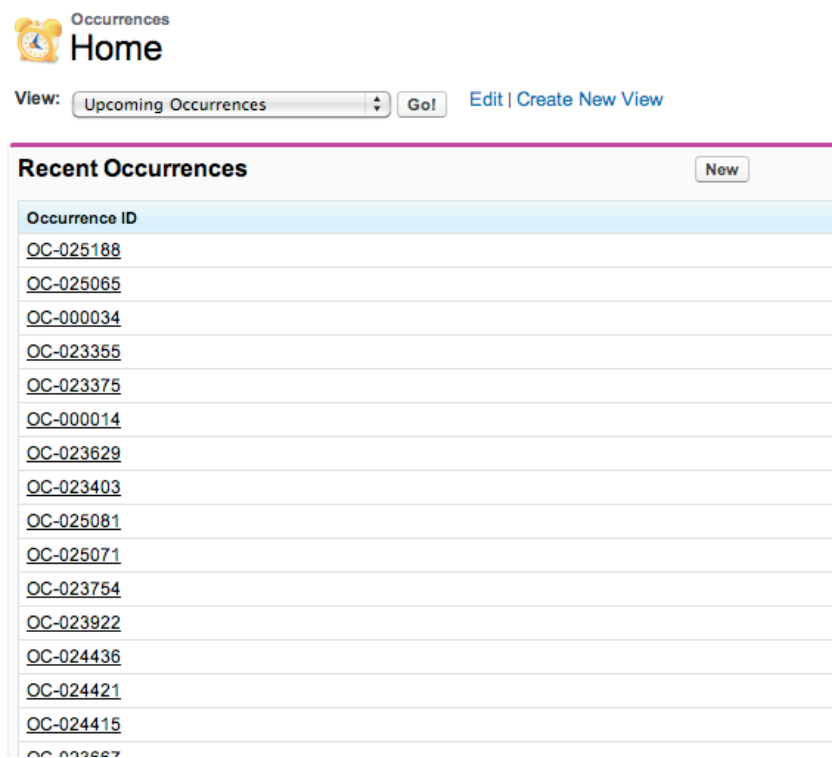
Name	Organization Name	Profile Name
<a href="#">Art Trout</a>	Troutco	Partner Staff

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



Occurrence ID
<a href="#">OC-025188</a>
<a href="#">OC-025065</a>
<a href="#">OC-000034</a>
<a href="#">OC-023355</a>
<a href="#">OC-023375</a>
<a href="#">OC-000014</a>
<a href="#">OC-023629</a>
<a href="#">OC-023403</a>
<a href="#">OC-025081</a>
<a href="#">OC-025071</a>
<a href="#">OC-023754</a>
<a href="#">OC-023922</a>
<a href="#">OC-024436</a>
<a href="#">OC-024421</a>
<a href="#">OC-024415</a>
<a href="#">OC-023557</a>

This isn't terribly useful :-)

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

Home Chatter Organizations Contacts Locations Volunteer Opportunities Occurrences Volunteer Events Volunteer Teams Co

Expand All | Collapse All

Quick Find

**Personal Setup**

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

**App Setup**

- Customize
- Create
  - Apps
  - Custom Labels
  - Objects**
  - Packages
  - Report Types
  - Tabs
  - Workflow & Approvals
- Develop
- Deploy
  - Installed Packages
  - AppExchange Marketplace **New!**
  - Critical Updates

**Administration Setup**

- Manage Users
- Company Profile
- Security Center

Custom Object

## Occurrence (Managed)

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

[Standard Fields \(4\)](#) | [Custom Fields & Relationships \(52\)](#) | [Validation Rules \(8\)](#) | [Page Layouts \(4\)](#) | [Field Sets \(BETA\)](#)

**Custom Object Definition Detail** [Edit](#)

Singular Label	Occurrence
Plural Label	Occurrences
Object Name	Occurrence
Namespace Prefix	HOC
API Name	HOC__Occurrence__c
Created By	Client Administrator, 7/8/2010 6:33 PM

**Package Information**

Installed Package [HOC](#)

**Standard Fields**

Action	Field Label	Field Name	Data Type
<a href="#">Edit</a>	<a href="#">Created By</a>	CreatedBy	Lookup(User)
	<a href="#">Last Modified By</a>	LastModifiedBy	Lookup(User)
	<a href="#">Occurrence ID</a>	Name	Auto Number
<a href="#">Edit</a>	<a href="#">Owner</a>	Owner	Lookup(User, C

**Custom Fields & Relationships** [New](#) [Field Dependencies](#) [Set History T](#)

Action	Field Label	API Name	Install
--------	-------------	----------	---------

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
<a href="#">Edit</a>	Search Results	Occurrence ID, Volunteer Opportunity	
<a href="#">Edit</a>	Lookup Dialogs	Occurrence ID, Volunteer Opportunity, Start Date & Time, End Date & Time, Volunteer Leader Needed	N/A
<a href="#">Edit</a>	Lookup Phone Dialogs	Occurrence ID	N/A
<a href="#">Edit</a>	Occurrences Tab	Occurrence ID	N/A
<a href="#">Edit</a>	Occurrences List View	N/A	New, Accept, Change Owner
<a href="#">Edit</a>	Search Filter Fields	Occurrence ID	N/A

## We can see the only field available is Occurrence ID

Edit Search Layout

### Occurrences Tab

Select the fields to include in this search layout. Note that your choices only determine the display of search results.

Available Fields		Selected Fields
Record ID	Add ▶ Remove ◀	Occurrence ID
City		
Country		
Days & Times Needed		
End Date & Time		
Google Map URL		
Guest Volunteer Hours Served		
Guest Volunteers Attended		
HOC Domain Name		
HOC ID		
Impact Measure #1		

Up  
▲  
▼  
Down

Save Cancel

## Add some other useful fields

ions   Contacts   Locations   Volunteer Opportunities   Occurrences   Volunteer Events   Volunteer Teams

Edit Search Layout

### Occurrences Tab

Select the fields to include in this search layout. Note that your choices only determine the display of search results.


Available Fields		Selected Fields
Volunteer Leader Needed	Add ▶ Remove ◀	Occurrence ID
Volunteer Opportunity Type		Volunteer Opportunity
Volunteers Attended		Start Date & Time
Volunteers Still Needed		Opportunity Coordinator Name
Zip/Postal Code		
Owner Alias		
Owner First Name		
Owner Last Name		
Created By Alias		
Created By		
Created Date		

Up  
▲  
▼  
Down

Save Cancel

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

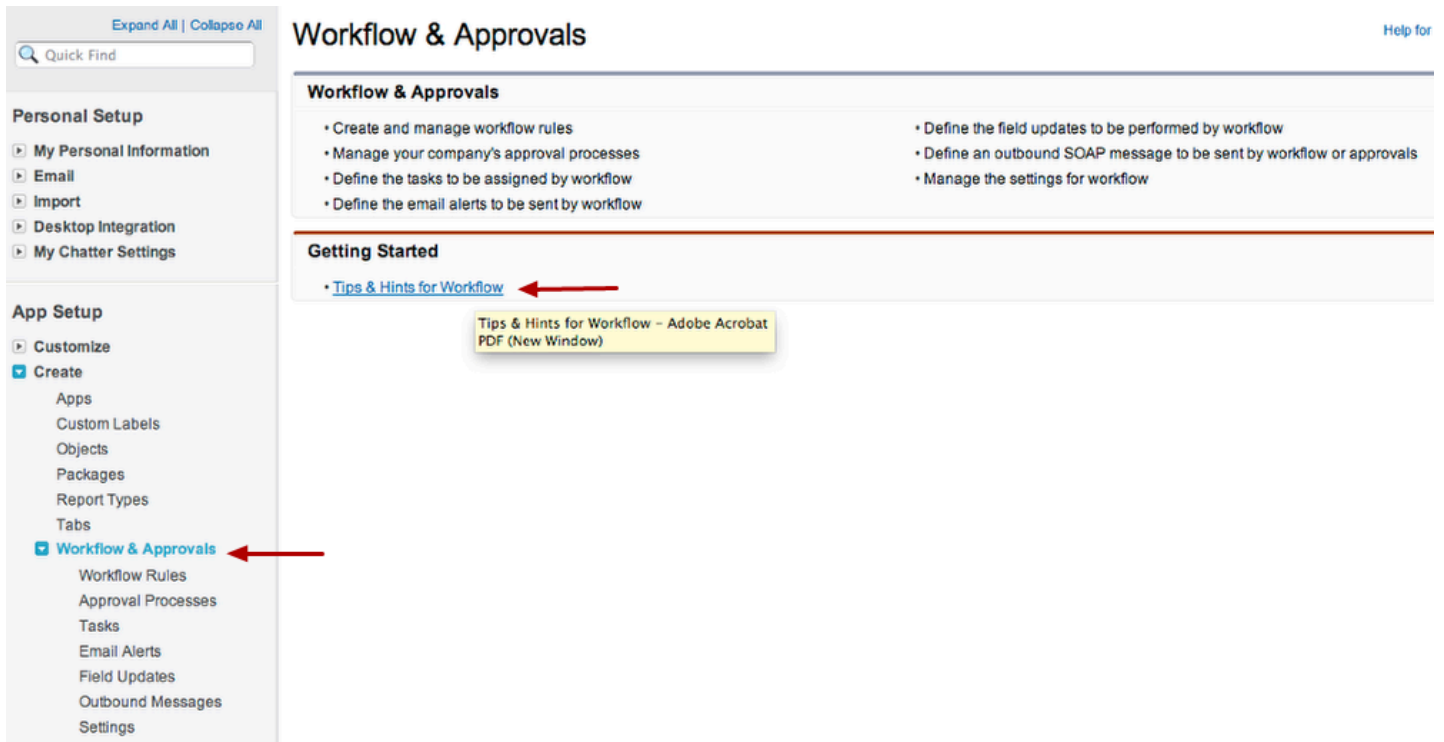
There's a nice video overview of creating workflow rules available in Salesforce:

<https://na7.salesforce.com/workflow/tutorial/creatingworkflowrule.htm>

 Many of the automations built 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.

**Workflow 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

**All Workflow Rules**

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, salesforce.com can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, salesforce.com can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

**Quick Tips**

- Getting Started
- Resources on CRM Community
- Useful Sample Workflow Rules
- Video Tutorial (English Only)

View: All Workflow Rules Edit Create New View

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

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Deactivate</a>	<a href="#">Append http to website</a>		Account	✓
<a href="#">Edit</a>   <a href="#">Deactivate</a>	<a href="#">AssociationHOC Id</a>	This will be used by the integration tool. Auto populated with (ORG Id + AS + S No)	Association	✓
<a href="#">Edit</a>   <a href="#">Deactivate</a>	<a href="#">Auto Populate Occurrence URL</a>		Occurrence	✓
<a href="#">Edit</a>   <a href="#">Deactivate</a>	<a href="#">Auto Populate Opportunity App. Mngr. Email</a>		Account	✓
<a href="#">Edit</a>   <a href="#">Deactivate</a>	<a href="#">Auto Populate Organization Served URL</a>		Volunteer Opportunity	✓
<a href="#">Edit</a>   <a href="#">Deactivate</a>	<a href="#">Auto Populate Partner Staff Email in Occ</a>		Occurrence	✓
<a href="#">Edit</a>   <a href="#">Deactivate</a>	<a href="#">Auto Populate Partner Staff Primary Contact Email</a>		Volunteer Opportunity	✓
<a href="#">Edit</a>   <a href="#">Deactivate</a>	<a href="#">Auto populate PostingStatus from Status</a>		Occurrence	✓
<a href="#">Edit</a>   <a href="#">Deactivate</a>	<a href="#">Auto populate PostingStatus from Status</a>		Volunteer Opportunity	✓
<a href="#">Edit</a>   <a href="#">Deactivate</a>	<a href="#">Auto Populate Volunteer Event URL</a>		Volunteer Opportunity	✓

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

Step 1: Select object Step 1 of 3

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

Select the object to which this workflow rule applies.

Select object Volunteer Opportunity

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

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

## Step 2: Configure the Workflow Rule

New Workflow Rule [Help for this Page](#)

**Volunteer Opportunity**

Step 2: Configure Workflow Rule Step 2 of 3

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

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

**Edit Rule** ! = Required Information

1 **Object** Volunteer Opportunity

**Rule Name** Orientation Required

**Description** This rule will update the field orientation required whenever a new affiliate-managed volunteer opportunity is created

**Evaluation Criteria**

2 **Evaluate rule** How do I choose?

☐ When a record is created, or when a record is edited and did not previously meet the rule criteria

☒ Only when a record is created

☐ Every time a record is created or edited

**Rule Criteria**

3 Run this rule if the following criteria are met:

Field	Operator	Value	
Managed By	equals	Affiliate	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Add Filter Logic...](#)

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

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

### Edit Rule Orientation Required

[Help for this Page](#) ?

Step 3: Specify Workflow Actions

Step 3 of 3

Done

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	Volunteer Opportunity: Managed By EQUALS Affiliate
Evaluation Criteria	Only when a record is created

#### Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▾

New Task
New Email Alert
New Field Update
New Outbound Message
Select Existing Action
Add Time Trigger

Workflow Actions

See an example

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

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

Edit Field Update

[Help for this Page](#) ?

## Update Orientation Required

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

**Field Update Edit** Save Save & New Cancel

**Identification** = Required Information

Name

Update Orientation Re

Unique Name

Update\_Orientation\_Ri i

Description

Place a checkbox (true) in the Orientation Required Field

Object

Volunteer Opportunity

Field to Update

Orientation Required

Field Data Type

Checkbox

**Specify New Field Value**

Checkbox Options

☒ True

☐ False

Save Save & New Cancel

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

## Edit Rule Orientation Required

[Help for this Page](#) ?

**Step 3: Specify Workflow Actions** Step 3 of 3

→ Done

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria

Volunteer Opportunity: Managed By EQUALS Affiliate

Evaluation Criteria

Only when a record is created

**Immediate Workflow Actions**

Action	Type	Description
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	<a href="#">Update Orientation Required 2</a>

Add Workflow Action ▼

**Time-Dependent Workflow Actions** [See an example](#)

i No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Add Time Trigger

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

Workflow Rule He

### Orientation Required

[« Back to List: Workflow Rules](#)

**Workflow Rule Detail** Edit Delete Clone Activate 


Rule Name	Orientation Required	Object	Volunteer Opportunity
Active	<input type="checkbox"/>	Evaluation Criteria	Only when a record is created
Description	This rule will update the field orientation required whenever a new affiliate-managed volunteer opportunity is created		
Rule Criteria	Volunteer Opportunity: Managed By EQUALS Affiliate		
Created By	Larry Deckel, 7/21/2011 11:26 AM	Modified By	Larry Deckel, 7/21/2011 11:26 AM

**Workflow Actions** Edit

**Immediate Workflow Actions**

Type	Description
Field Update	<a href="#">Update Orientation Required 2</a>

**Time-Dependent Workflow Actions** [See an example](#)

 No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Edit

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.

# 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

**All Workflow Rules**

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, salesforce.com can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, salesforce.com can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

View: **All Workflow Rules** Edit | Create New View

Quick Tips

- Getting Started
- Resources on CRM Community
- Useful Sample Workflow Rules
- Video Tutorial (English Only)

Action	Rule Name	Description	Object	Active
Edit   Deactivate	Append http to website		Account	✓
Edit   Deactivate	AssociationHOC Id	This will be used by the integration tool. Auto populated with (ORG Id + AS + S No)	Association	✓
Edit   Deactivate	Auto Populate Occurrence URL		Occurrence	✓
Edit   Deactivate	Auto Populate Opportunity App. Mngr. Email		Account	✓
Edit   Deactivate	Auto Populate Organization Served URL		Volunteer Opportunity	✓
Edit   Deactivate	Auto Populate Partner Staff Email in Occ		Occurrence	✓
Edit   Deactivate	Auto Populate Partner Staff Primary Contacts Email		Volunteer Opportunity	✓
Edit   Deactivate	Auto populate PostingStatus from Status		Occurrence	✓
Edit   Deactivate	Auto populate PostingStatus from Status		Volunteer Opportunity	✓
Edit   Deactivate	Auto Populate Volunteer Event URL		Volunteer Opportunity	✓
Edit   Deactivate	Auto-populate Email from Contact		Volunteer Team Member	✓
Edit   Deactivate	Auto-populate State		Location	✓
Edit   Deactivate	Auto-populate VL Approval Manager		Connection	✓
Edit   Deactivate	Auto-populate VL Approval Manager		Volunteer Opportunity	✓
Edit   Deactivate	Auto-populate Volunteer Email from Contacts		Connection	✓
Edit   Del   Deactivate	Background Check for Children and Youth Services	This workflow (used in homework #7), updates the field "Background Check Required" for any opportunity that is edited to indicate "Age Groups Served" is "Children and Youth"	Volunteer Opportunity	✓
Edit   Del   Activate	Background Check required		Volunteer Opportunity	✗
Edit   Deactivate	Check Registration Date		Occurrence	✓

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.

The screenshot shows the 'All Tasks' page in HandsOn Connect. The left sidebar has a 'Quick Find' bar and a navigation menu. Under 'App Setup', 'Workflow & Approvals' is expanded, and 'Tasks' is selected. The main content area shows a table of tasks. A red arrow points to the task 'New Organization has registered' in the 'Subject' column.

Action	Subject	Due Date	Priority	Status	Assigned To	Notify Assignee	Type
<a href="#">Edit</a>	<a href="#">New Organization has registered</a>	Created Date + 1 days	Normal	Not Started	User : Larry Deckel	<input type="checkbox"/>	Account
<a href="#">Edit</a>	<a href="#">New Volunteer Opportunity awaiting approval</a>	Created Date + 1 days	Normal	Not Started	User : Larry Deckel	<input type="checkbox"/>	Volunteer Opportunity

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:

Task

Printable View | Help for this Page

## New Organization has registered (Managed)

« Back to List: Workflow Tasks

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

[Rules Using This Task \[1\]](#) | [Approval Processes Using This Task \[0\]](#)

Workflow Task Detail

Edit

Clone

Object	Account	Status	Not Started
Assigned To	User : <a href="#">Larry Deckel</a>	Priority	Normal
Subject	New Organization has registered	Notify Assignee	<input type="checkbox"/>
Unique Name	New_Organization_has_registered		
Namespace Prefix	HOC		
Installed Package	<a href="#">HOC</a>		
Due Date	Created Date + 1 days		
Comments	A new organization has been created and is awaiting being granted partner access. To access this organization click on the organization name in the "related to" field.		
Created By	<a href="#">Client Administrator</a> , 7/8/2010 6:33 PM	Modified By	<a href="#">Larry Deckel</a> , 8/31/2010 4:35 PM

Edit

Clone

Rules Using This Task

Rules Using This Task Help

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Deactivate</a>	<a href="#">TaskWhenPartnerRegister</a>		Account	<input checked="" type="checkbox"/>

Approval Processes Using This Task

Approval Processes Using This Task Help

This task is currently not used by any approval processes

[^ Back To Top](#)
[Always show me fewer / more records per related list](#)

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.

Edit Task

### New Organization has registered (Managed)

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

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

Save Save & New Cancel

Edit Task

Object

Account

Assigned To

Larry Deckel

Subject

New Organization has

Unique Name

New\_Organization\_ha

Namespace Prefix

HOC

Installed Package

HOC

Due Date

Created Date

Notify Assignee

☐

Status

Not Started

Priority

Normal

plus

1

days

Description Information

Comments

A new organization has been created and is awaiting being granted partner access. To access this organization click on the organization name in the "related to" field.

Save Save & New Cancel

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

### All Tasks

[Help for this Page](#)

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

View: [All Tasks](#) [Edit](#) [Create New View](#)

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

Action	Subject	Due Date	Priority	Status	Assigned To	Notify Assignee	Type
<a href="#">Edit</a>	<a href="#">New Organization has registered</a>	Created Date + 1 days	Normal	Not Started	User : Larry Deckel	<input type="checkbox"/>	Account
<a href="#">Edit</a>	<a href="#">New Volunteer Opportunity awaiting approval</a>	Created Date + 1 days	Normal	Not Started	User : Larry Deckel	<input type="checkbox"/>	Volunteer Opportunity

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

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 notifying agencies of the sign-ups.

## Email Alerts

The screenshot displays the 'All Email Alerts' configuration page in the HandsOnConnect System Administrator. On the left, a sidebar menu shows the navigation path: Personal Setup (My Personal Information, Email, Import, Desktop Integration, My Chatter Settings), App Setup (Customize, Create), and Workflow & Approvals (Workflow Rules, Approval Processes, Tasks, Email Alerts, Field Updates, Outbound Messages, Settings). The 'Email Alerts' option is highlighted. The main content area is titled 'All Email Alerts' and includes a description: 'Email alerts are the emails that workflow rules send when triggered.' Below this, there is a 'View:' dropdown set to 'All Email Alerts' and links for 'Edit' and 'Create New View'. A table lists the email alerts with columns for 'Action' and 'Description'. Each row includes an 'Edit' link, a download icon, and the alert description.

Action	Description ↑
Edit	<a href="#">New Organization Registered</a>
Edit	<a href="#">Notification of volunteer removals</a>
Edit	<a href="#">Notification of volunteer signups</a>
Edit	<a href="#">Occurrence Approval Requested</a>
Edit	<a href="#">Opportunity Approval Requested</a>
Edit   Del	<a href="#">Opportunity Expiration Notice</a>
Edit	<a href="#">Opportunity Expiration Notice</a>
Edit	<a href="#">Opportunity is now live</a>
Edit   Del	<a href="#">Opportunity Reminder - Affiliate Managed</a>
Edit	<a href="#">Opportunity Reminder - Affiliate Managed</a>
Edit   Del	<a href="#">Opportunity Reminder - Partner Managed</a>
Edit	<a href="#">Opportunity Reminder - Partner Managed</a>
Edit	<a href="#">Opportunity Sign-up Confirmation - Affiliate Managed</a>

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

# Email Alert Detail

Rules Using This Email Alert (1) | Approval Processes Using This Email Alert (0)

## Email Alert Detail

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

Description	Notification of volunteer signups	3	Email Template	<a href="#">Notification of v</a>
Unique Name	Notification_of_volunteer_signups		Object	Connection
Namespace Prefix	HOC			
1	Installed Package	<a href="#">HOC</a>		
From Email Address	Default Workflow User's email address			
2	Recipients	Email Field: Volunteer Coordinator Email		
Additional Emails				
Created By	<a href="#">Client Administrator</a> , 7/8/2010 6:33 PM		Modified By	<a href="#">Art Ordoqui</a> , 1/1

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

### Rules Using This Email Alert

Action	Rule Name	Description	Object
<a href="#">Edit</a>   <a href="#">Deactivate</a>	<a href="#">Notification of volunteer signups</a>		Conne

### Approval Processes Using This Email Alert

This alert is currently not used by any approval processes

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 indicates 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 email 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 has 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.

[illegible]

# 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 screenshot shows the Salesforce Classic Setup interface. On the left sidebar, under 'Personal Setup', 'My Chatter Settings' is selected. Under 'App Setup', 'Workflow & Approvals' is selected, and 'Settings' is highlighted with a red arrow. The main content area is titled 'Workflow & Approvals Settings' and includes a 'Help for this Page' link. The settings are as follows:

- Default Workflow User:** A text field containing 'Larry Deckel' with a search icon to its right. A red arrow points to the search icon.
- Enable Email Approval Response:** A checkbox that is currently unchecked.
- Warning Message:** A yellow box with a warning icon stating: "By enabling the email approval response feature, you agree to allow salesforce.com to process email approval responses, update approval requests for all active users in your organization, and update the approval object on behalf of your organization's users."

At the top and bottom of the settings area are 'Save' and 'Cancel' buttons.

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

Setup Home Object Manager

Search Setup

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.

## Process Automation Settings

Save Cancel

Specify a default workflow user. Salesforce recommends choosing a user with system administrator privileges.

Default Workflow User: 9015 HOC Admin

By default, the email approval sender is the approval submitter. To override the default sender, select an organization-wide email address.

Email Approval Sender: Approval Submitter

Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comments in the second line.

Enable email approval response ☐

**By enabling the email approval response feature, you agree to allow Salesforce to process email approval responses, update approval requests for all active users in your organization, and update the approval object on behalf of your organization's users.**

Let users pause flows when they need to wait for more information. Once you enable this setting, the Pause button appears on every screen that has "Show Pause button" label.

Let users pause flows ☐

Let users resume interviews that are shared with them, either directly or via the role hierarchy. When disabled, interviews can be resumed only by the user who paused the interview or a flow admin who has view access.

Let users resume shared flow interviews ☒

Flows launched from a URL or from Setup use the Lightning runtime experience instead of the classic runtime experience. Only Lightning runtime supports two-column layouts.

Enable Lightning runtime for flows ☒

When creating or updating records, the flow can use sObject variables to define the field values. If the running user doesn't have edit access to those fields, by default the flow fails. This setting filters the inaccessible fields from the request for Fast Create and Fast Update elements.

Filter inaccessible fields from flow requests ☒

Allows Apex code to set and remove approval process locks.

Enable record locking and unlocking in Apex ☐

When a process or flow interview fails, Salesforce sends an email with details about everything that was executed and what failed.

Send Process or Flow Error Email to: User Who Last Modified the Process or Flow

Save Cancel

# 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.

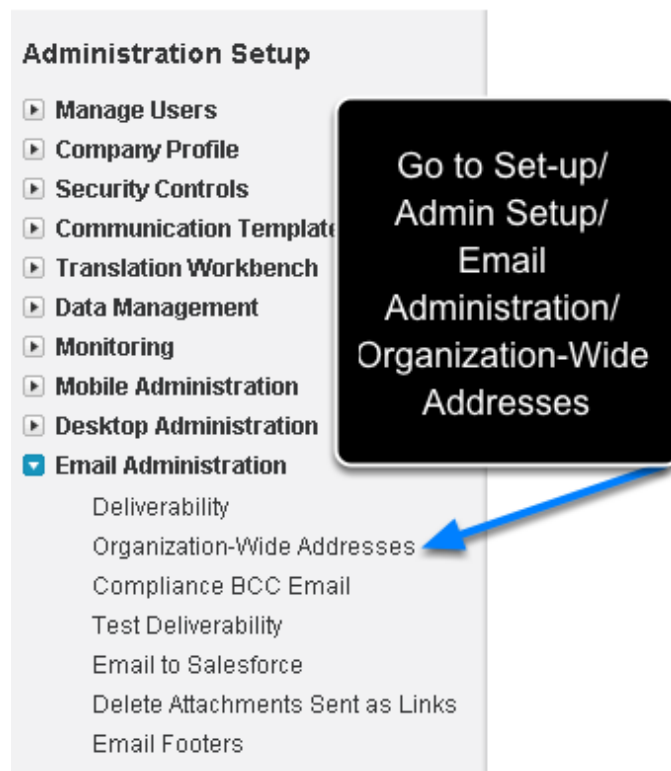
Customers can create as many organization wide email addresses and grant access to various profile to use them. More information on the organization wide email address can be found at [salesforce.com Help & Training](https://salesforce.com Help & Training).

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

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

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

## Accessing Organization-Wide Email Addresses



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

**Organization-Wide Email Addresses** Add

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

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

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

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

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

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



Dear Art Ordoqui,

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

New Organization-Wide Email Address: [Redacted]

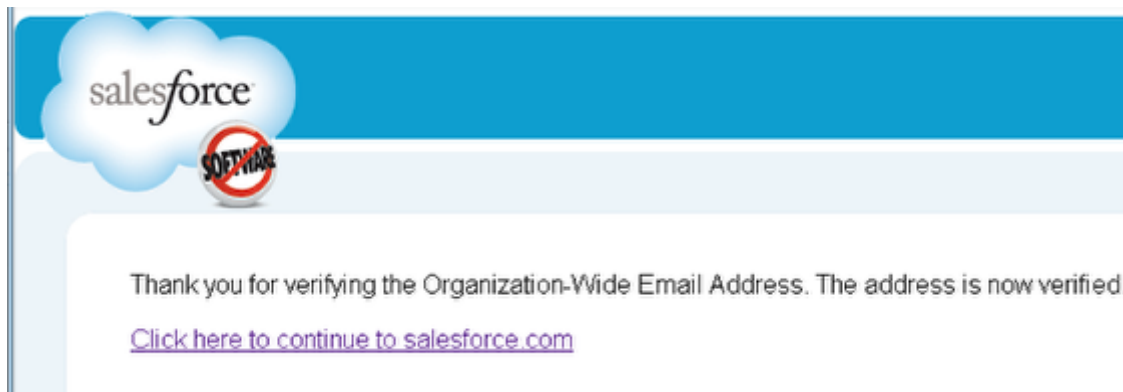
Click this link to confirm this Organization-Wide Email Address: [https://na7.salesforce.com/setup/emailid=00DA0000000aAsx&k=UT9DAjkyjD0f3UZWMqTkeMsvJmjSYeNJMMb2w\\_aJeBbR1k1U3lfT%3D%3D](https://na7.salesforce.com/setup/emailid=00DA0000000aAsx&k=UT9DAjkyjD0f3UZWMqTkeMsvJmjSYeNJMMb2w_aJeBbR1k1U3lfT%3D%3D)

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

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

Thank you,  
salesforce.com

Click on the link to activate...



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

Shows as verified

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

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

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

**System Default** [Save]

Allow one step signup ☒ ?

Default ZIP Code

Include Full occurrences in search ☐

Display Name of Default Organization-Wide Email Address  ?

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

[Save]

## If you started with HandsOn Connect prior to May, 2016

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

# Creating new organization-wide email addresses

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

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

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

## Creating a new Organization-Wide Email Address

### Organization-Wide Email Addresses

[Help for this Page](#)

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

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

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

Click on the **ADD** button

## Edit Organization-Wide Email Addresses

[Help for this Page](#)

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

SaveSave and NewCancel

Organization-Wide Email Address

= Required Information

Display Name

HandsOn Twin Cities

Email Address

info@handsontwincitk

☐ Allow All Profiles to Use this From Address

☒ Allow Only Selected Profiles to Use the From Address

Profiles

Overage Customer Portal Manager Standard

Overage Authenticated Website User

Overage Customer Portal Manager Custom

Volunteer

Volunteer Leader

Partner Staff

System Administrator

Volunteer Old

Partner Staff Old

Staff

SaveSave and NewCancel

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

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

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

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

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

# 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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Coordinator Grant Portal Access</a>	HTML	✓	This email notify the affiliate that they need to grant portal access to the new Volunteer Coordinator	HAdmin	1/11/2012
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Default email sent to occurrence volunteers</a>	Text	✓	Template for VL to email his members from the occurrence page. Modified by the VL before team VL it.	rsing	1/11/2012
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Login Information</a>	Text	✓	this mail is sent to the Agency with the login details to access the system	rsing	1/11/2012
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">New Organization Registered</a>	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


Edit HTML Email Template

### Coordinator Grant Portal Access (Managed)

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

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


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

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

Email Template Edit

SaveSave & NewCancel

Email Template Information

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

SaveSave & NewCancel

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

### SAVE the change.

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

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

## HOC Email Templates

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

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

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

[New Template](#)

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

## Then click on the "Edit HTML" button.

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

---

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

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

**HTML Preview**

**Sign Up & Serve**

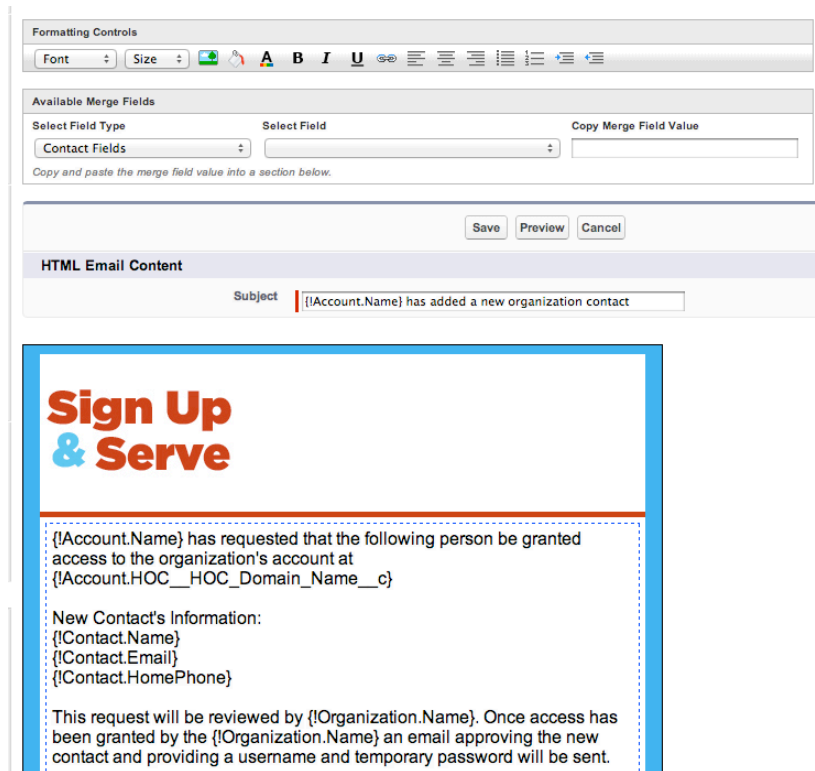
---

{!Account.Name} has requested that the following person be granted access to the organization's account at  
{!Account.HOC\_\_HOC\_Domain\_Name\_\_c}

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

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

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



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

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

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

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

If you are satisfied with the look of the email:

Then click SAVE

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

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


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

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

**Email Template**

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

**HTML Preview**



Click on "Edit Text Version"

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

Click Save.

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

**Text-Only Email Content**

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

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

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

Click SAVE.

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

# 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

The screenshot shows the 'Understanding Letterheads' help page. On the left is a sidebar with navigation links: 'Personal Setup' (My Personal Information, Email, Import, Desktop Integration, My Chatter Settings), 'App Setup' (Customize, Create, Develop, Deploy, Installed Packages, AppExchange Marketplace, Critical Updates), and 'Administration Setup' (Manage Users, Company Profile, Security Controls, Communication Templates). The 'Letterheads' link under 'Communication Templates' is highlighted. The main content area is titled 'Understanding Letterheads' and includes a 'Quick Find' search bar, a 'Help for this Page' link, and a 'Next' button with a red arrow. The text reads: 'Set up your Letterhead to standardize the look and feel of HTML email templates.' Below this, a diagram titled 'What is a Letterhead?' shows a 'Company Logo' box, a 'Graphic' box, and a 'Select an email layout to format the body copy of your HTML email.' section with four layout options. A checkbox at the bottom says 'Don't show this page again'.

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

Expand All | Collapse All  
  
**Personal Setup**  

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

**App Setup**  

- Customize
- Create
- Develop
- Deploy

- Installed Packages
- AppExchange Marketplace **New!**
- Global Updates

## All

Letterheads define the look and feel of your HTML email templates. Your HTML email templates can inherit the logo, color, and text settings from a Letterhead. Below is a list of your organization's Letterheads.

Tip: Create just a single Letterhead for your company. Use this Letterhead as the foundation for all your HTML email templates.

View: All [Create New View](#)

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


Action	Letterhead Label	Available For Use	Description
<a href="#">Edit</a>   <a href="#">Del</a>	BirthdayEmailLetterhead	✓	
<a href="#">Edit</a>   <a href="#">Del</a>	Happy Birthday	✓	used for the Happy Birthday email template
<a href="#">Edit</a>   <a href="#">Del</a>	<b>HOC Letterhead</b>	✓	Will be appended to all the ongoing emails.
<a href="#">Edit</a>   <a href="#">Del</a>	Testtwo	<input type="checkbox"/>	

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

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

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

**Letterhead Detail**
[Edit Properties](#)
[Edit Letterhead](#)
[Delete](#)

Letterhead Label	HOC Letterhead	
Letterhead Unique Name	HOC_Letterhead	
Namespace Prefix	HOC	
Installed Package	HOC	
Available For Use	✓	Modified By <a href="#">Larry Deckel</a> , 5/28/2011 3:40 AM
Description	Will be appended to all the ongoing emails.	
Created By	<a href="#">Client Administrator</a> , 7/8/2010 6:33 PM	



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 it'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.**