Content Management System (CMS)

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Content Management System (CMS) Overview

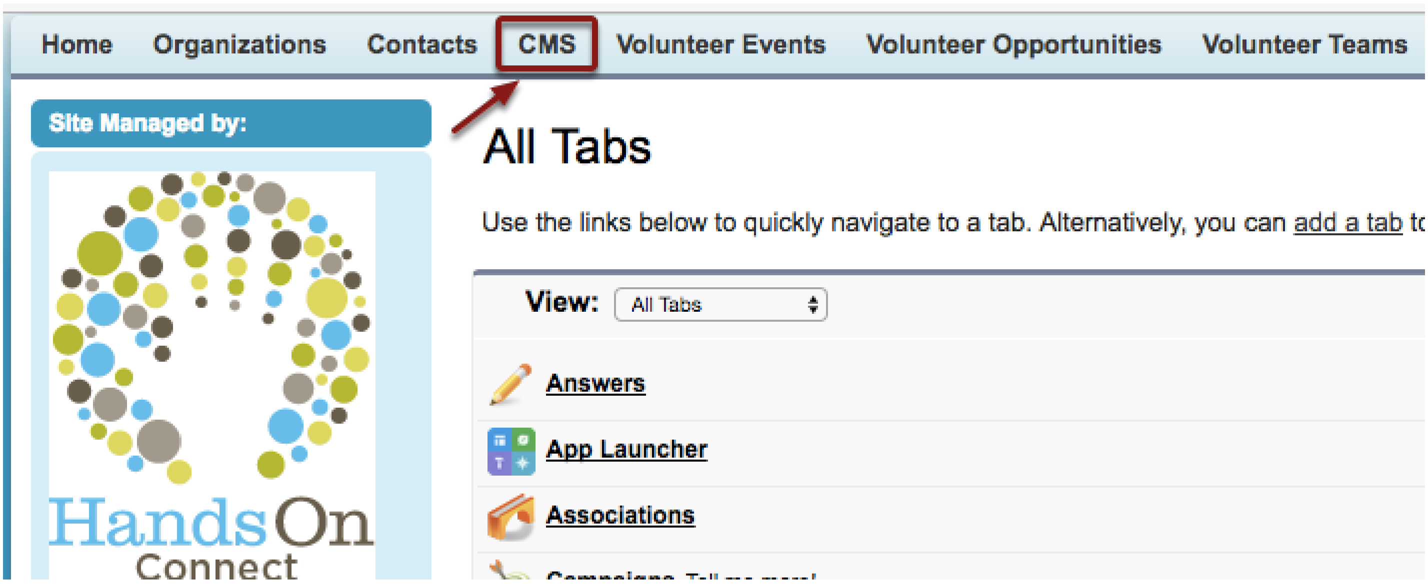
Accessing the CMS

Your HandsOn Connect public site, and some of the content in the Sharing Portal are customizable from the Content Management System (CMS). You use the CMS to create site navigation and to edit or create pages of content,

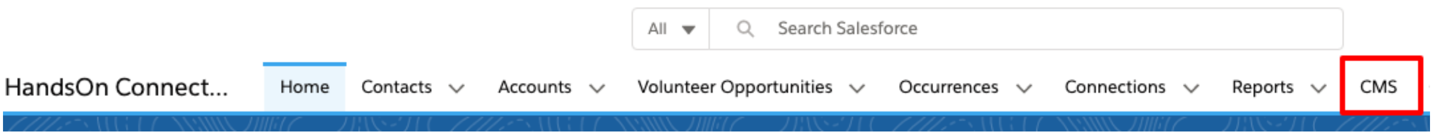
This article gives you a general introduction to working with the CMS.

To access the CMS, click on the CMS Tab in Salesforce.

In Classic:



In Lightning:



Only users with System Administrator Profile will have access to the CMS tab and be able to launch the CMS. If other SF users (those with profile Staff for example), need permission to access the CMS -- add the permission set "HOC CMS" to their user record. That will give them access to open the CMS via the CMS tab.

Whenever a Salesforce user accesses the CMS for the first time from Salesforce, a contact record with their name and Salesforce username will be created if such a contact does not already exist.

Do not delete or merge this contact as its required to exist in your data in order to be able to access the CMS.

The CMS opens in a new tab in your browser

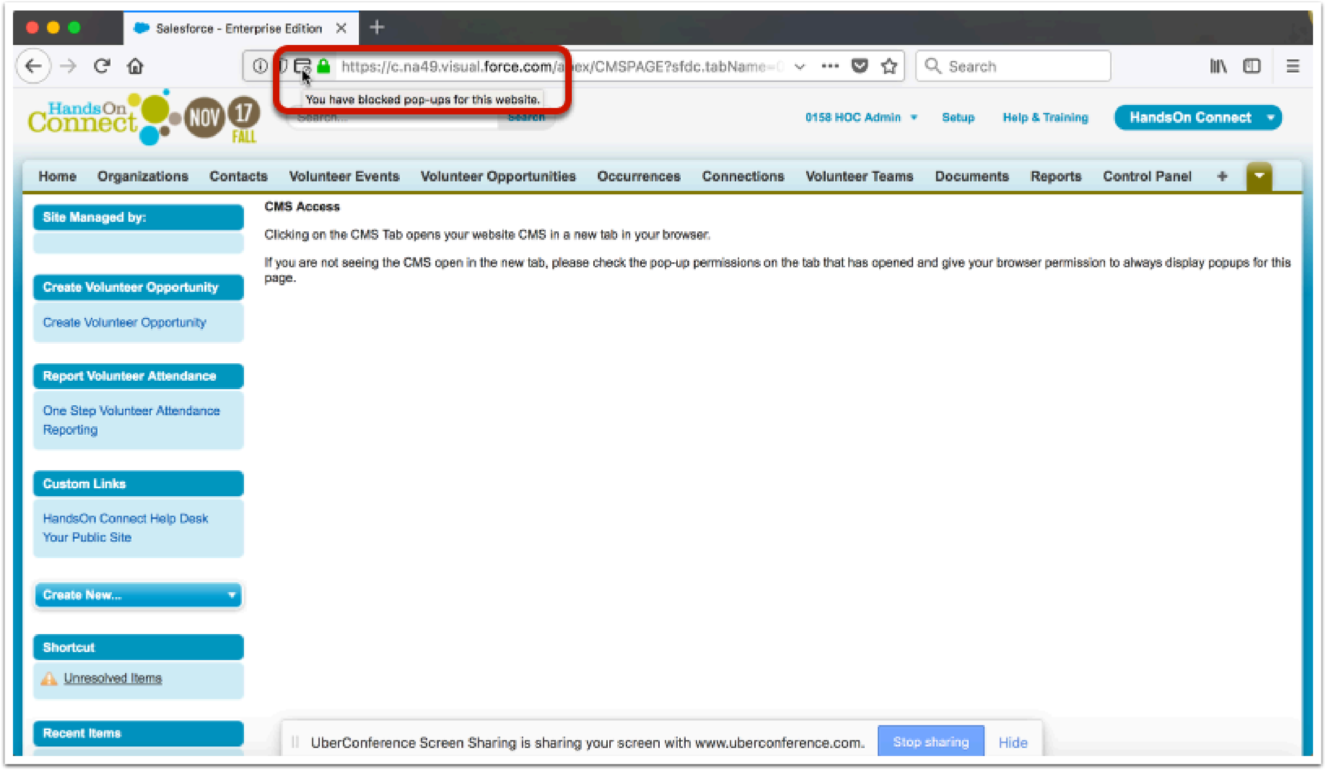
The CMS will open in a new tab in your browser (so that you can work in the CMS and still have access to the back end of Salesforce at the same time.

The first time you click on the CMS tab you may not see the new tab appear. If that's the case, your browser will be giving you a warning if you have 'block pop-ups' set as a browser default. If so, you'll need to grant your browser permission to allow popups for this website.

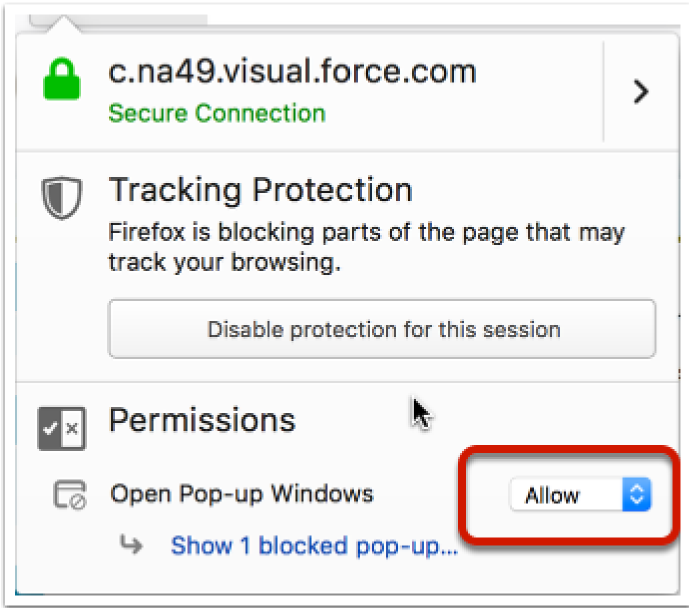
The warnings show up differently depending on the browser your are using

How the warning appears on Firefox:

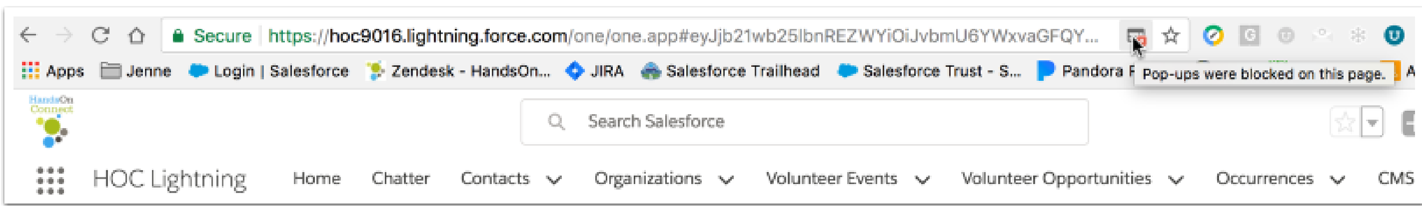
Click on the warning icon, to access the permissions.



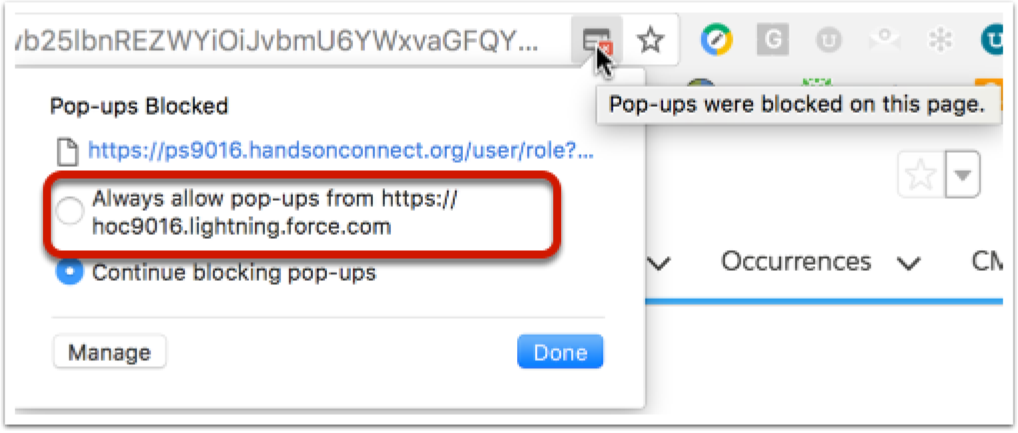
Set the permission to "Allow"



How the warning appears in Chrome:



Click "Always allow pop-ups" for your salesforce site.



Once you've allowed pop-ups the first time. Then click on the CMS tab again. This time a new tab will open with your public site displayed, and the CMS menu items revealed.

Working with the CMS (Overview)

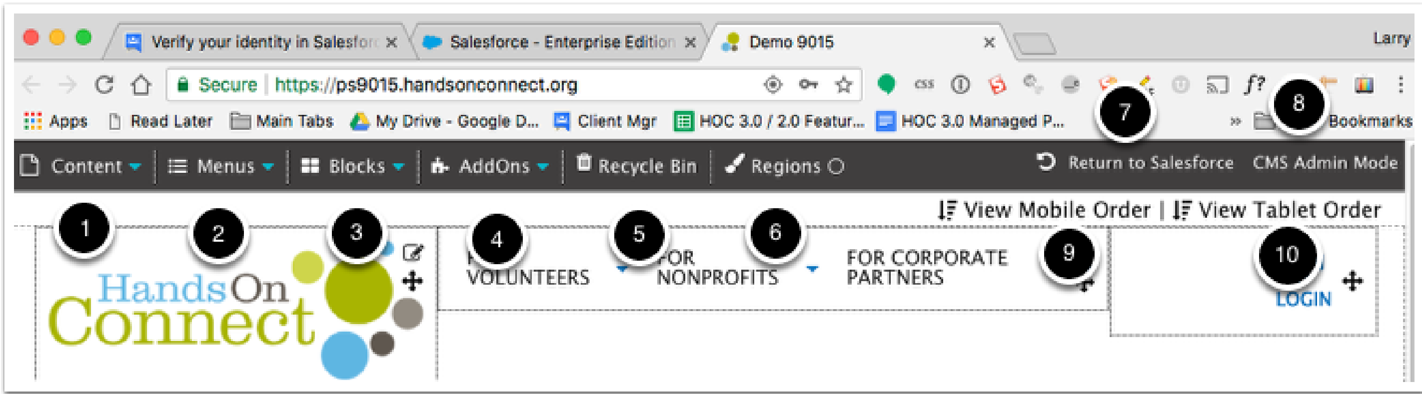
This article gives a general overview of the interface for working with the CMS.

Be aware that your instance of HandsOn Connect will have different page layout defaults depending on the template you've chosen. Menu items and availability of blocks and AddOns will vary depending on the features you have chosen to activate or purchased as HandsOn Connect Add-Ons.

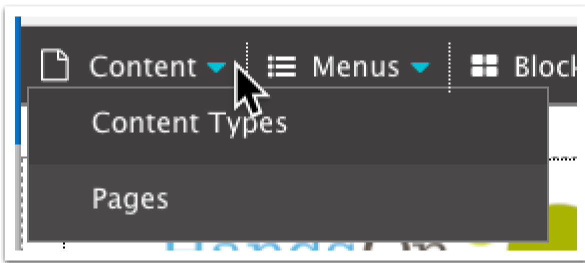
If there is a block or AddOn not available on your site, that you wish to have added, please open a support ticket.

CMS Menu Items

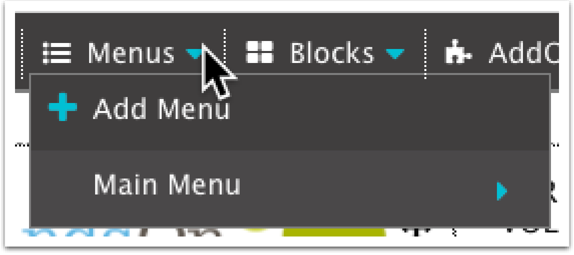
The easiest way to access elements of the CMS is through the black menu bar located at the top of the page.



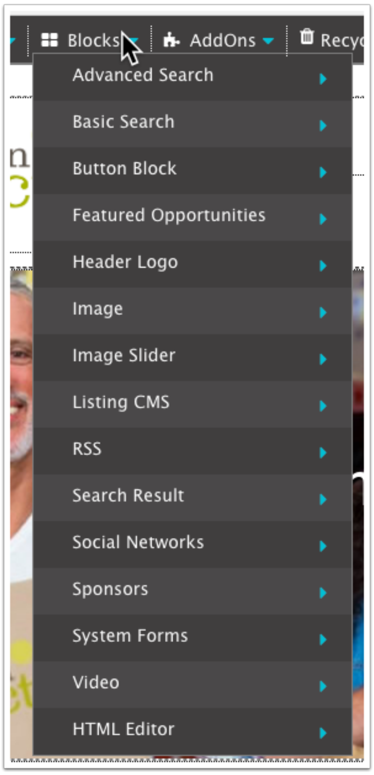
1. **Content:** Allows you to define [Content Types](), and to create and edit [pages]()



2. **Menus:** Allows you to [Edit Existing Menus (Site Navigation), and add New Menus]()



3. Blocks: Blocks are elements that can be placed within pages. The Home Page for example, is nothing more than a collection of blocks.   [See this Chapter which discusses all the different blocks and how they work.]



4. **Add-Ons** - The Add-Ons menu contains special items in the CMS. All users have access to some AddOns (included with HOC), and other features are premium add-ons that can be purchased. Some Add-Ons are only activated for advanced coders who need deeper access to features in the CMS. Add-ons require advanced training and are not intended for general CMS users.

5. **Recycle Bin** - The Recycle Bin allows you to recover items you've deleted in the CMS

6. **Regions** - Clicking on The Regions menu allow you to see the various regions where you can place blocks, content, etc Click again to hide the region names.

7. **Return to Salesforce -** clicking on this link will exit you out of the CMS and return you to Salesforce. (You can also still access Salesforce in the other tab from which you launched the CMS.

8. **CMS Admin Mode -** this heading just advices you are in CMS admin mode. Clicking on opens a box asking for an "Elevation Code" - which is for the use of our support staff and developers only.

9 and 10. **View Mobile Order / View Tablet Order -** The page layouts for phones (mobile) and Tablets are different than for the desktop version of the site. Click on these links to be able to edit how the layout of a page is best arranged for those devices. A default will be shown - but you can optimize the page for mobile or tablet so that it makes sense on those device configurations. When working in mobile or tablet view, click on Return to Desktop View to get back to the main view of your website.

CMS controls that are visible on the page itself

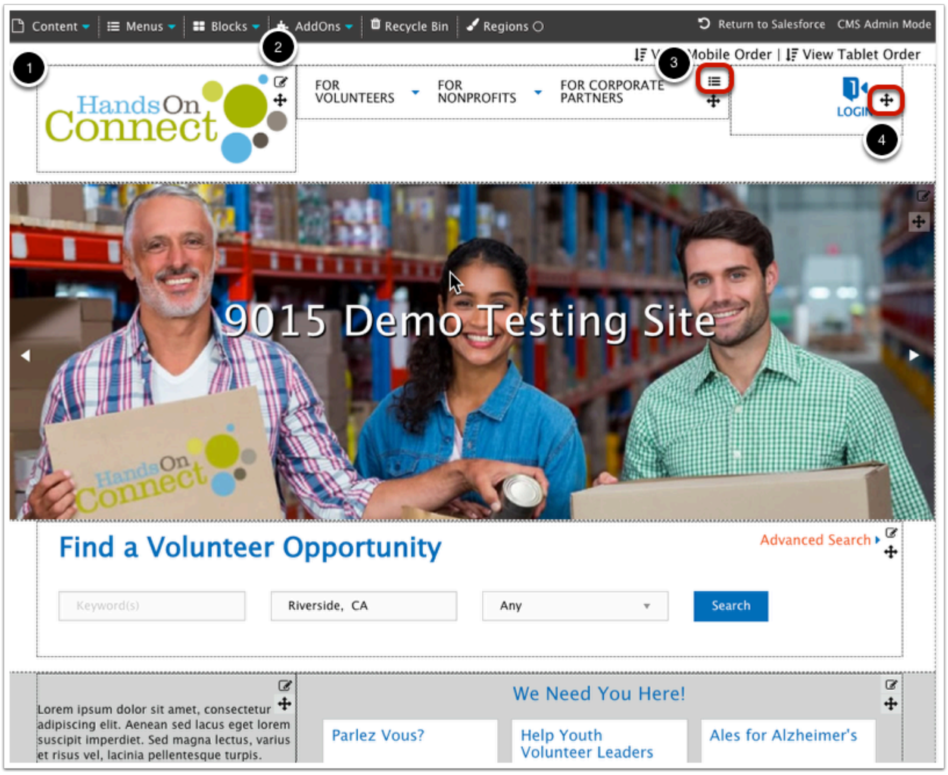
There are a number of markers and icons that show you how your page is laid out. Here is what each element does:

1. Outlines appear around each block or section of the page. This shows you how much space each block is occupying and its position on the page.

2. The icon of a square and a pencil gives you access to edit that particular block, form or page. Click on it to edit that page element.

3. On Menu (navigation) elements on the page - an icon that looks like bullet points, allows you to edit that menu directly.

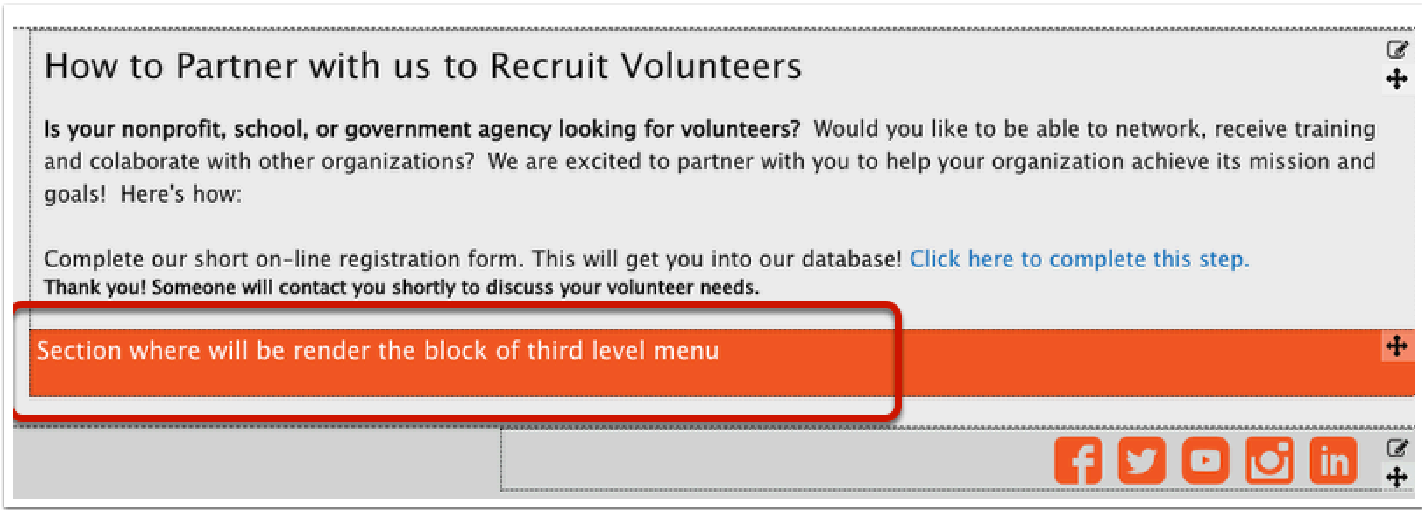
4. The icon with two crossed arrows is the 'move' icon. Click on it to drag a block or element to a new position on the page. This allows you to quickly reorder how the elements appear on the page.



Some page elements you see in the CMS may not be used

There are space holders for some elements that you may not be using in the CMS. In the example below, a section is labeled "Section where will be render the block of third level menu" (*sorry about the awkward English there :-)* and that just indicates that if you have a third level menu you add -- this is where it will appear in this template.

If you are not using a third level menu - this 'placeholder' will not be visible on the published site.



When working in the CMS, its handy to have a second browser opened or a new window with a private or incognito window opened, to display the Public Site as it appears to the public. That way you can see the effect of the work you're doing in the CMS, and how it will appear on your actual website.

Note: Browsers often cache and will not immediately display your changes. Either turn off browser caching or click 'reload' a number of times to be sure you're seeing the newest version of your website.

Working with Images (Overview)

A question we get a lot is: what are the recommended sizes for images for our website?

There are so many factors that go into the how an image, and site, is displayed e.g., screen size, screen quality, browser, orientation (portrait or landscape), device, where the image is used (e.g., full width hero image, thumbnail, inline image with text), that it is not an easy question to answer.

But we can provide some recommendations that will help in most cases and variables, based on the average screen width of devices. Since website users are used to scrolling vertically on screens, what you need to control mostly is the width of the image.

General Recommendations for Image Widths

These are our general recommendations:

Mobile width: ~ 620px

Tablet width: ~ 950px

Standard Desktop width: ~1,420px

If you know your site will be viewed on very large screens, you may need a wider image.

Note that for screens not as wide as the widths, the browser will try to scale them down. It is important that you also select images that have content that will scale well if they are "shrunk".

Don't have text that runs to the edges of the width, keep important content in the center of the image. Avoid heads/faces that are right at the top of the image that may get cut off when images are resized to fit the space.

Remember, making your site look good is not an exact science.

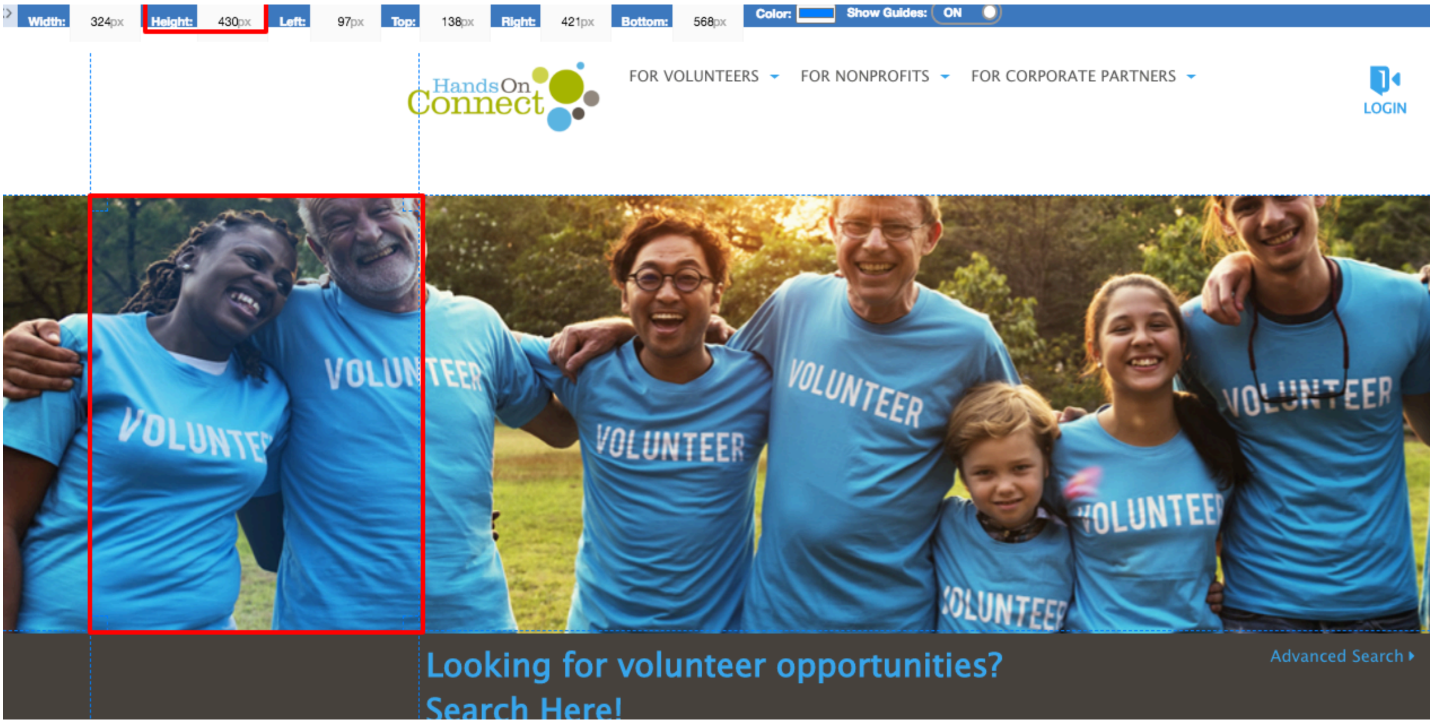
You may need to tinker a bit or engage the help of a designer with some basic skills in HTML and CSS.

Pro Tip: For banners and wide edge to edge images, you want to image as wide as possible (e.g., over 1,200px) but adjust the height to the height of the space. Hence, the trick is how to determine the height.

One way is to measure it!

You can do this in your browser by using an extension. In Chrome, for example, there is a great extension called Page Ruler. It's free. Once installed you can measure any element on a page.

Below is an example of measuring the height of a hero image using Page Ruler. Use your mouse to create a box from top to bottom of the image (the width is not that important in this case). Notice that in the top left it will tell you the height of the image.

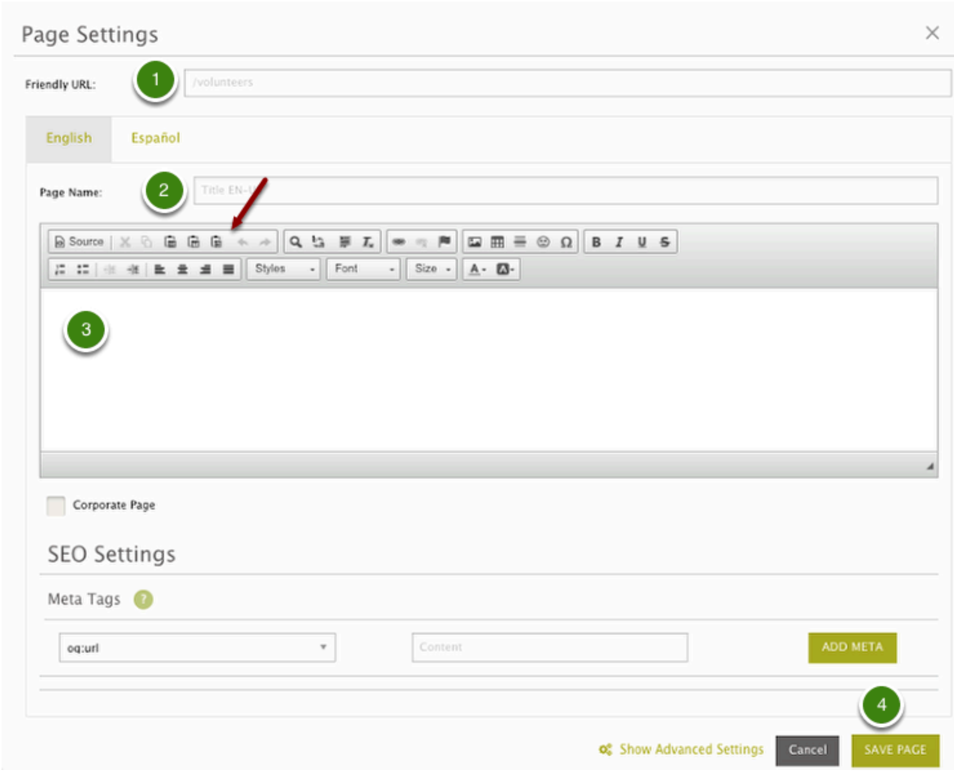


Content - Working with Pages

Creating a new Page

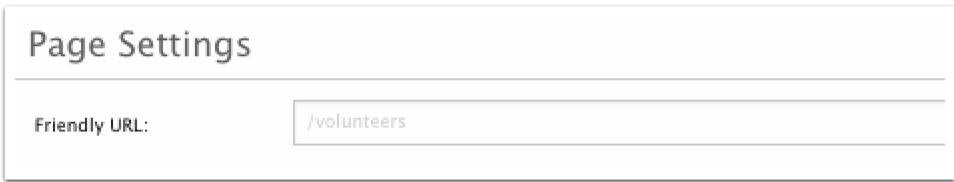
With HandsOn Connect 3.0, you can add and publish pages!

Adding a Page



- Select **CMS** from the menu bar.
- Select **Pages,** the first option on the menu bar.
- Click on **CREATE NEW PAGE**

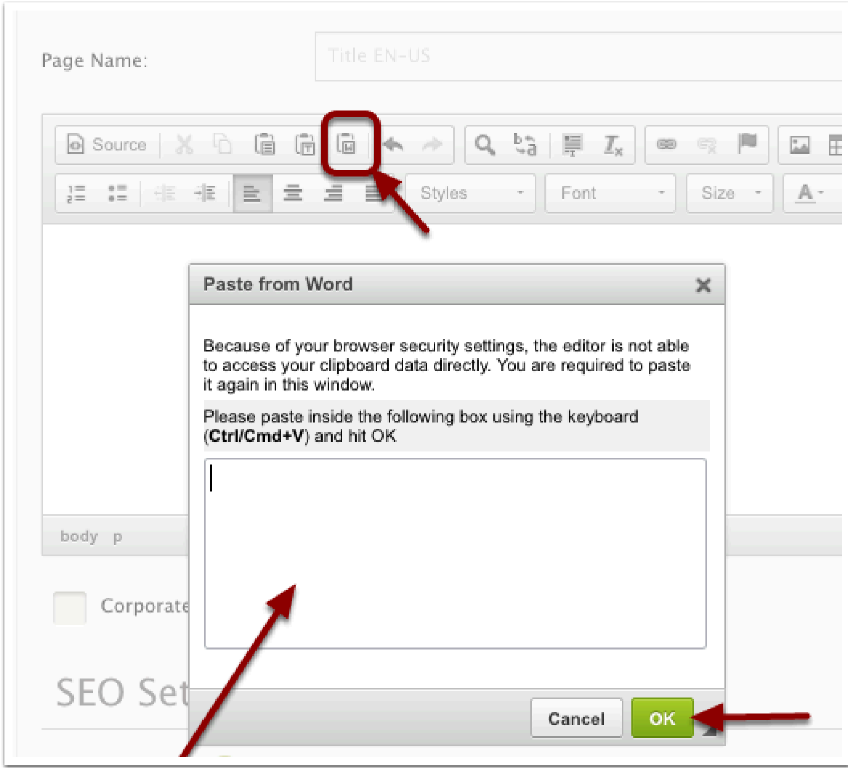
1. **Friendly URL:** Is a required filed to simplify the search for your page. Example: if you are creating a volunteer page you will type **/Volunteer** in the Friendly URL: window.



2. **Page Name:** Add a title to your page.

3. **Adding content:** You can begin entering text in the box immediately.

Past From Word: Use this feature to copy and paste from a Microsoft Word document into the text box.



Please paste inside the following box using the keyboard (Ctrl/Cmd+V) and hit OK

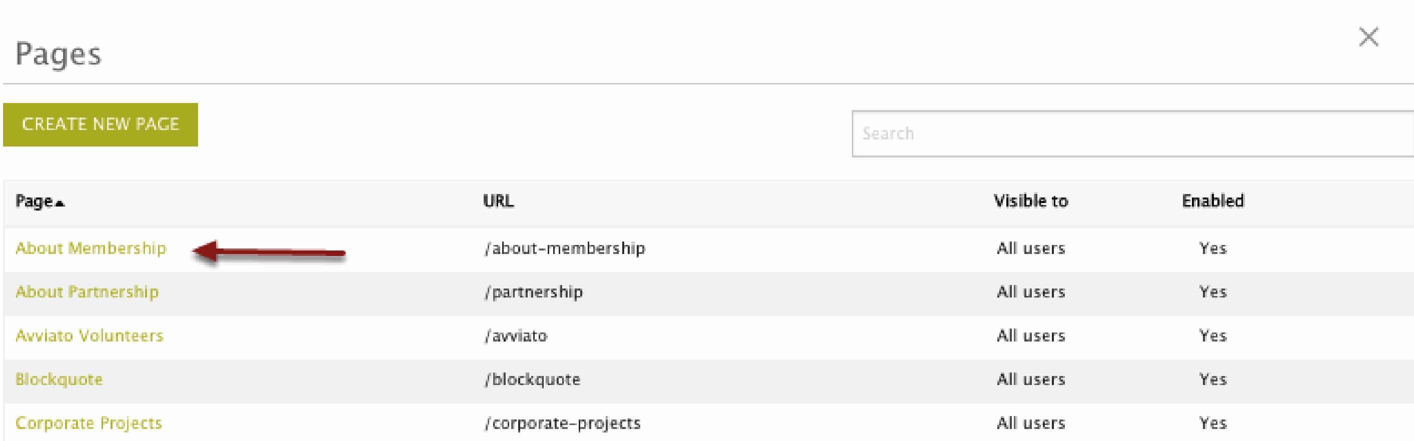
SEO Settings: **Meta tags** contain keywords or phrases alerting search engines of a website's content to be included in search results for users requesting related information.

4. Click **SAVE PAGE.**

Editing existing pages

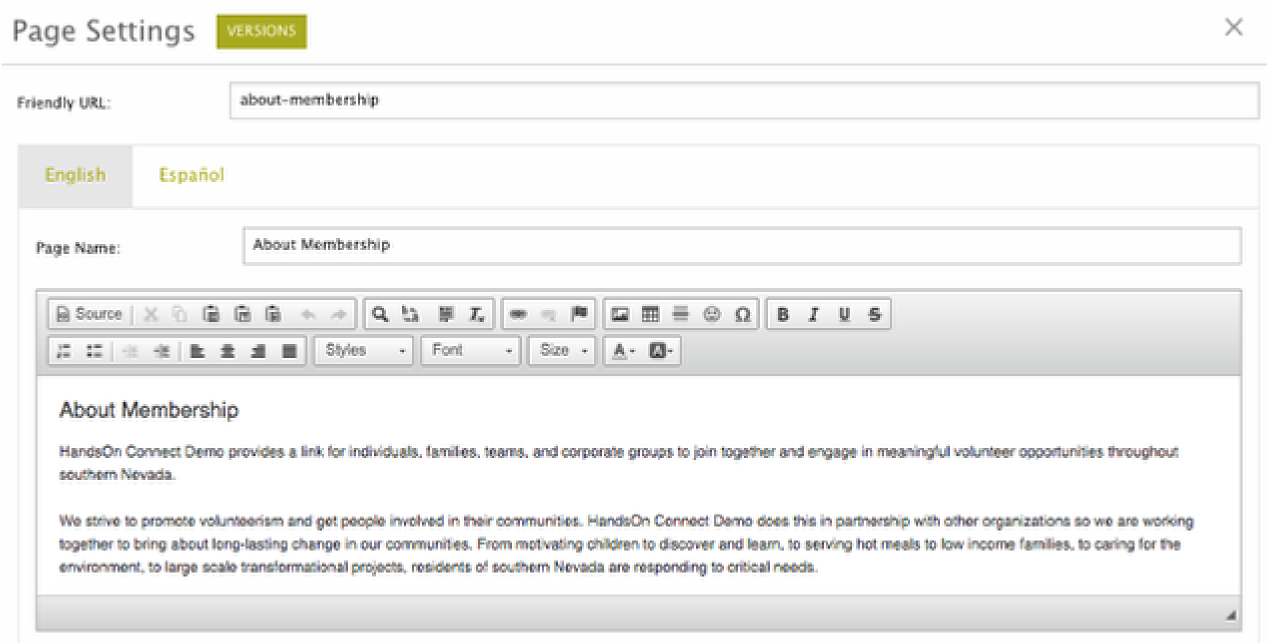
HandsOn Connect 3.0 provides common tools for editing your page. Using the toolbar, you can customize fonts and the way your contents are organized.

Accessing the pages to be edited



1. Click on **Pages** first option on the menu bar.
2. Select the page that you want to modify / edit

Editing the page content



1. Click the content you want to edit, position your cursor where you want, and then enter the text you want to add.
2. Highlight the text you want to edit, and then use the toolbar to edit the content such as font type, font size, font color, text alignment, and hyperlinks.
3. To accept the changes to your content click the **Save Page.**
4. To discard the changes click **Cancel.**

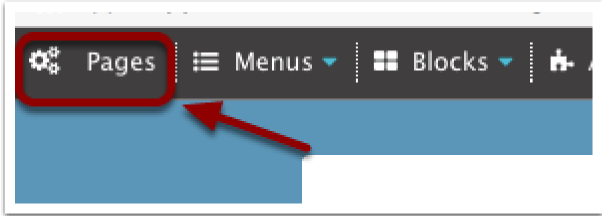
Hiding a Web Page

If you want to display your website with some Web pages removed temporarily, HandsOn Connect CMS 3.0 lets you hide those pages.

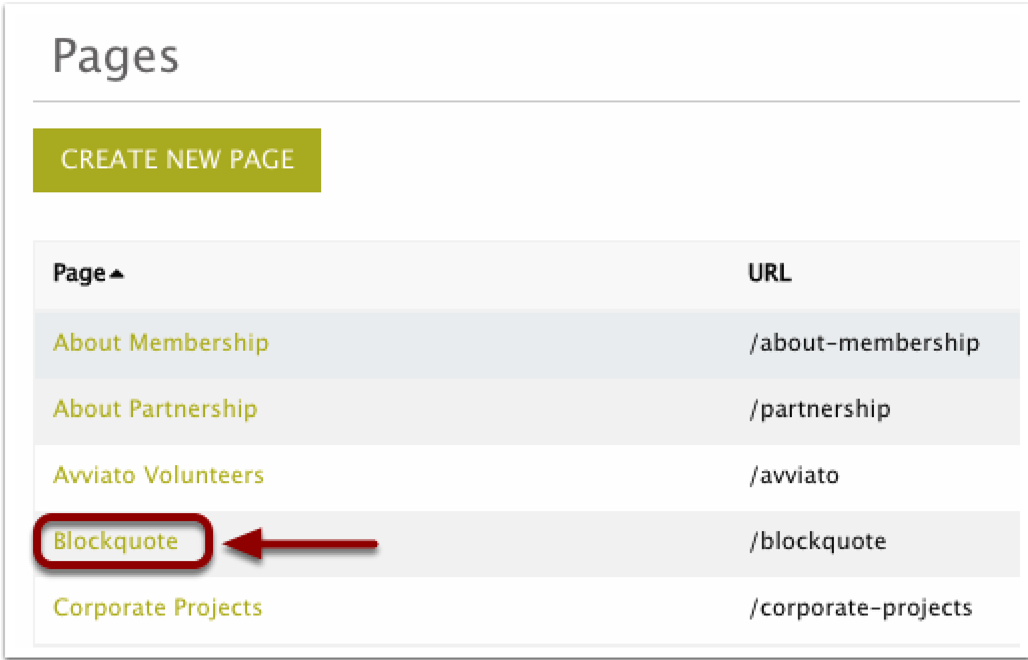
Each time you re-publish your site, you can select which pages display live on the Internet, while those you did not remain visible only in "Menu Item Settings"

To hide a web page

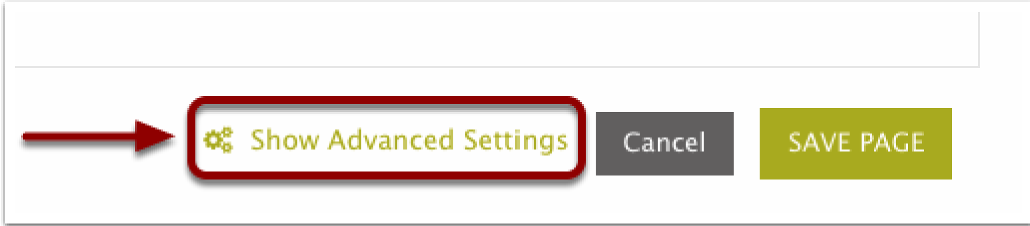
1. Select **Pages**



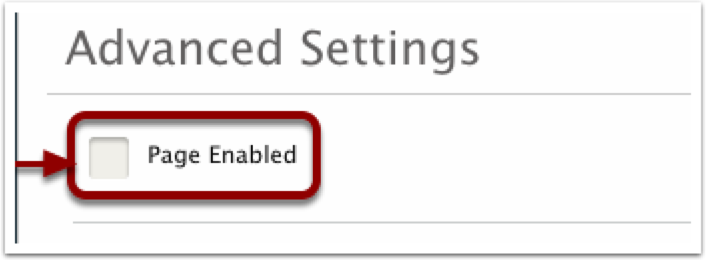
2. Click the page you want to hide



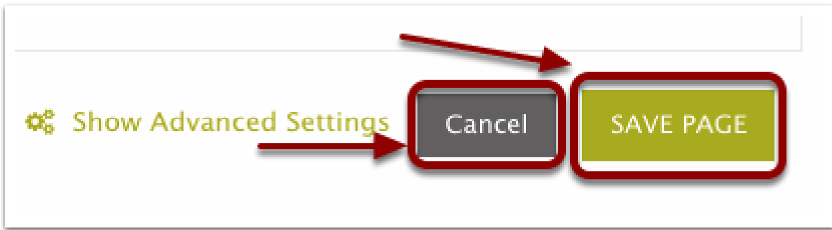
3. Select **Show Advanced Settings** at the lower right of your page



4. Uncheck **Page Enabled**



5. Make sure to click **SAVE PAGE** to save all changes or
6. Click **Cancel** to discard all changes

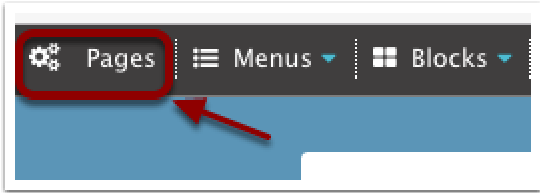


Deleting a Web Page

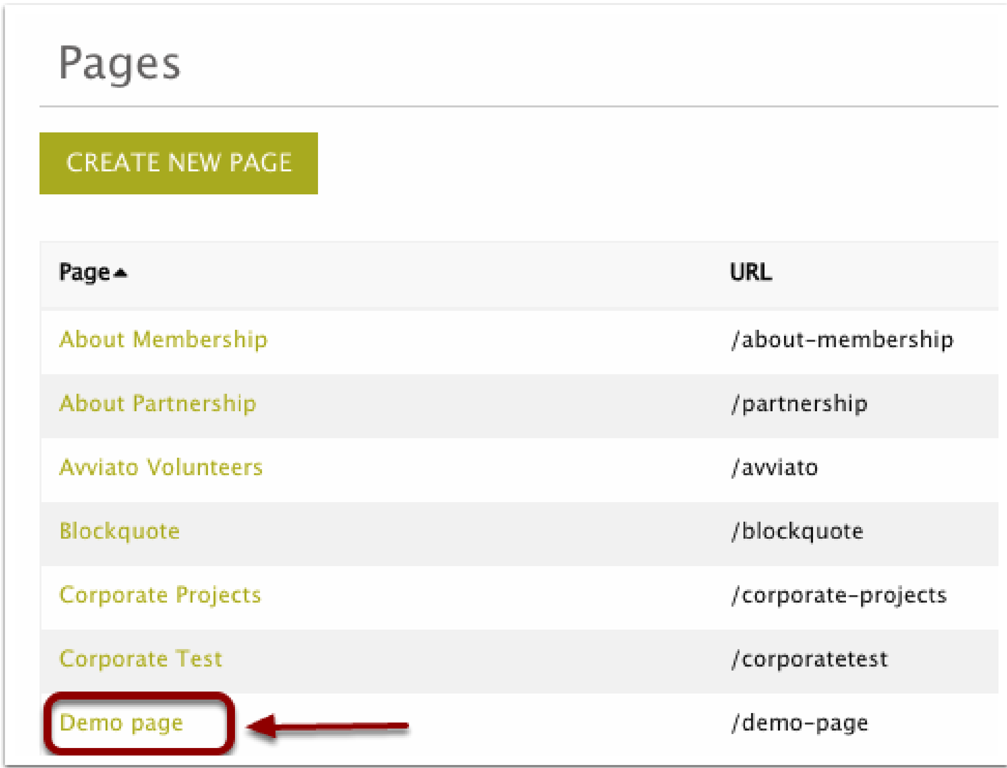
As your site changes, or you change your mind, you can delete pages from your website.

To delete a web page

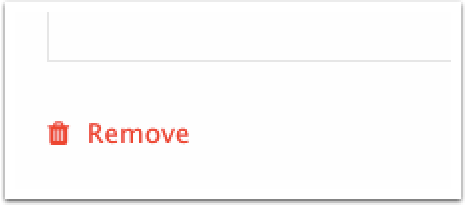
1. From the main menu select **Pages**



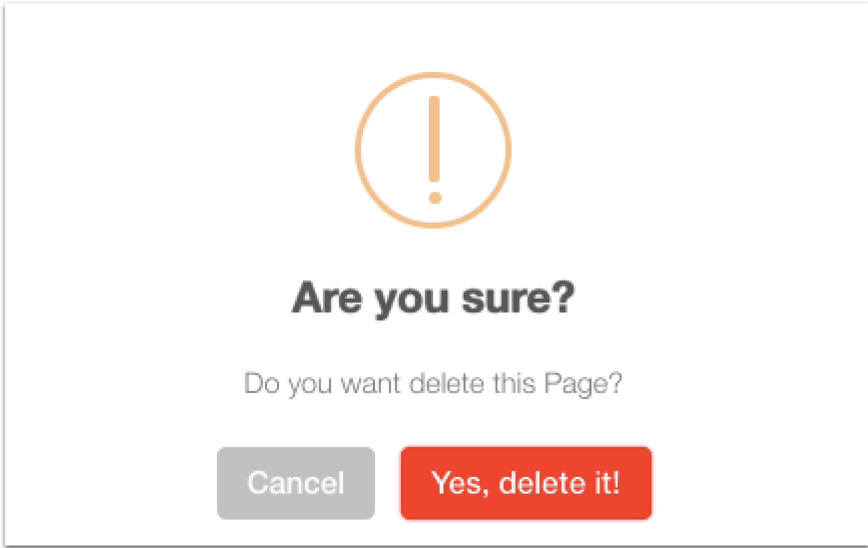
2. Click on the page you like to remove



3. Select **Remove** at the lower left of your screen



4. Click **Yes, delete it!** to confirm or
5. Click **Cancel** to discard you act

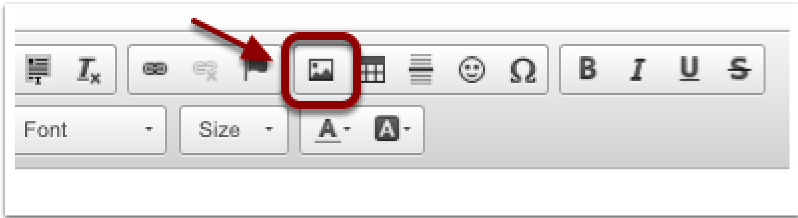


Adding Images to a Page

Adding images to your page

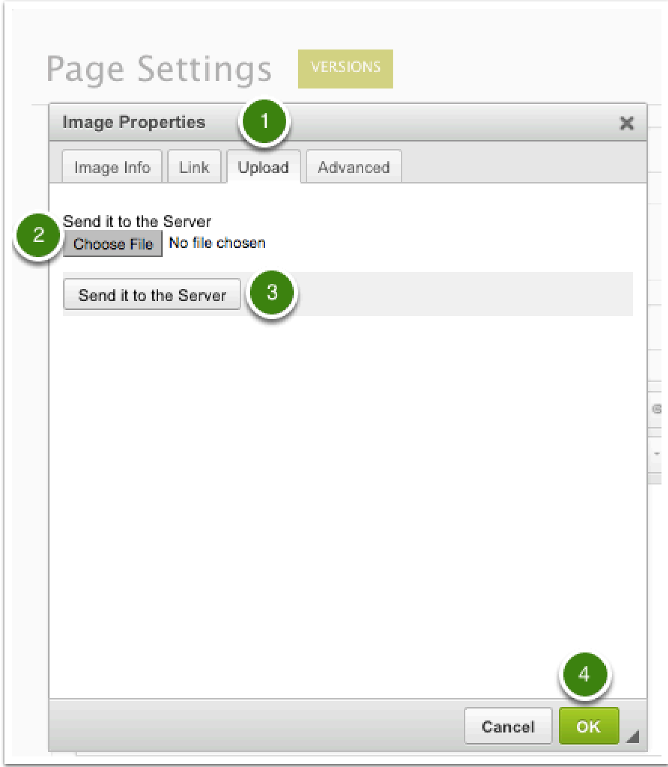
Before you can add an image, you'll need to upload the image to the server, or you can select an existing image from the image gallery.

1. Click on **Pages f**rom the main menu
2. Select the page you want to add an image to
3. Click on the image icon



Uploading Images

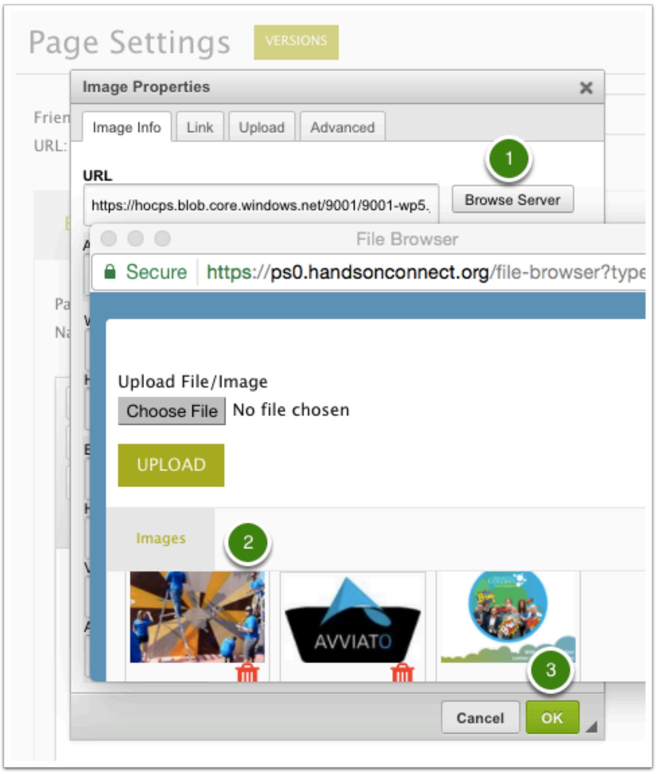
1. Click on the **Upload** tab
2. Click on **Choose File**
3. Select your file
4. Click on the **Send it to the Server** tab
5. Click **OK** to save your work.



Selecting images from the server

1. Click on the **Browse Server** tab
2. Select the image from the gallery
3. Click **OK** to save your picture on the web page.

Please note you can upload a picture from this step as well.


Page Settings
VERSIONS
Image Properties
Image Info
Link
Upload
Advanced
URL
https://hocps.blob.core.windows.net/9001/9001-wp5.
Browse Server
1
File Browser
Secure
https://ps0.handsonconnect.org/file-browser?type
Upload File/Image
Choose File
No file chosen
UPLOAD
Images
2
AVVIATO
3
Cancel
OK

Adding linked files (Chatter Files)

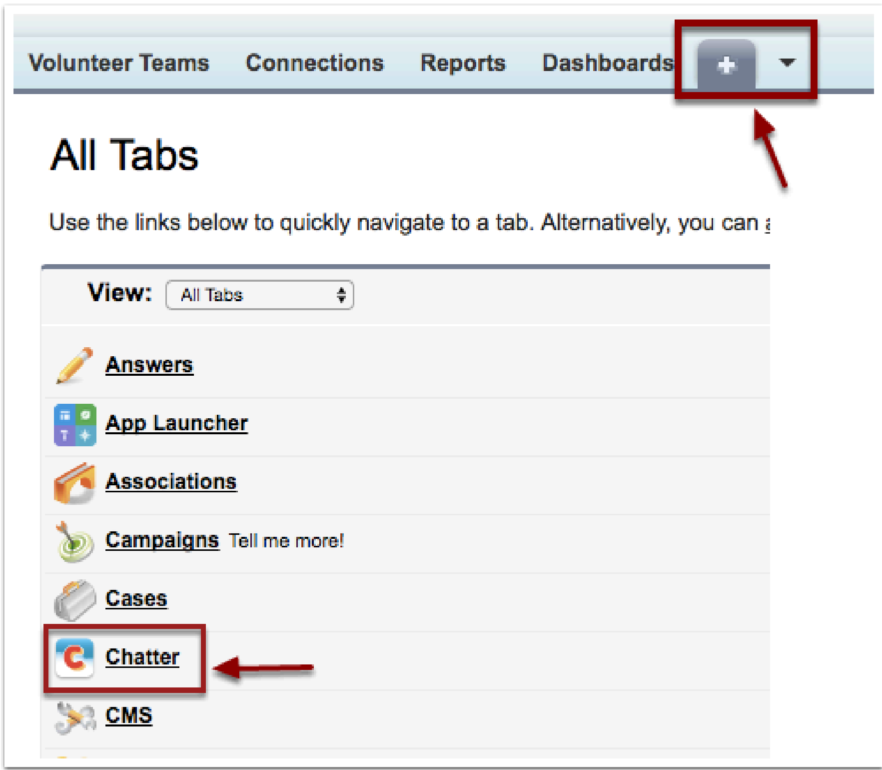
Using Chatter to share and view files

Chatter has made using Salesforce easier in many, many ways. Instead of saving documents as salesforce 'documents' - and having to remember arcane steps to link those documents for download to the public site, Chatter makes it possible to upload files quickly, automates naming, and allows you to share the documents with users, groups, or anyone with a public link. The public link can be used to make documents available to view and/or download from the HandsOn Connect public site!

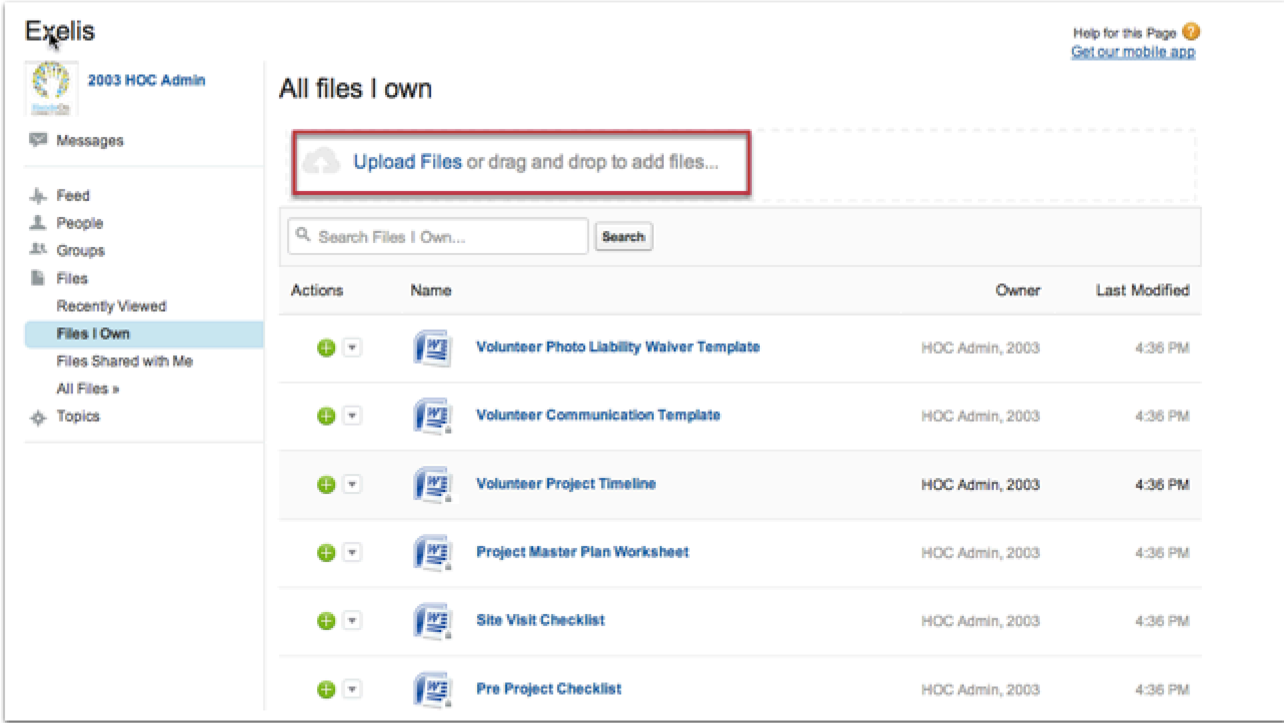
This makes it possible to even view Microsoft Word documents via the public site!

To start, click on the Chater Tab on the menu bar.

"If you do not see the Chater tab, try clicking on the arrow to the right of the + sign (where some tabs are hidden when browser is not wide enough), OR you can add the tab yourself by clicking on the + icon and adding it to your page layout"



Go to Chatter / Files and upload or drag and drop files you wish to share:

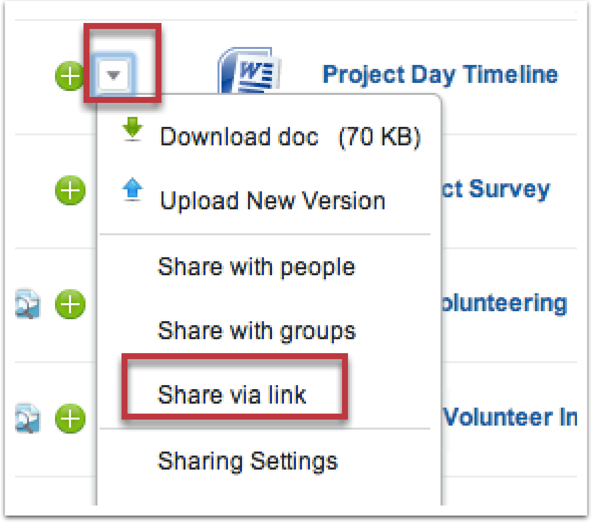


You can either upload files individually, or drag and drop multiple files all at once! This easily adds files to your collection of shareable files.

Set the Sharing for each File:

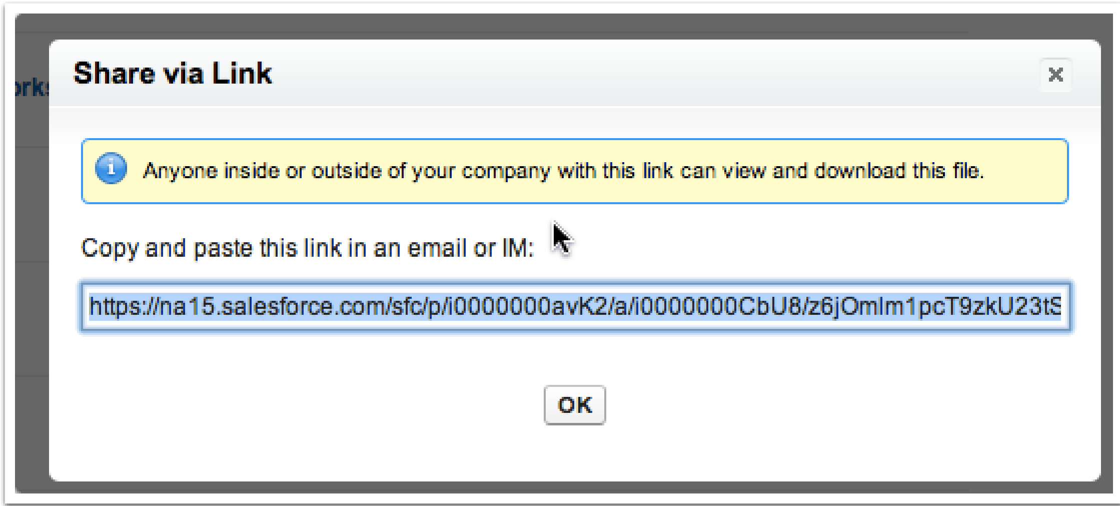
Click on the drop down arrow next to a file's name, and you can set the sharing options for the document, determining who can see and share your document.

To make a document available via the public site, you are going to choose Share via link.

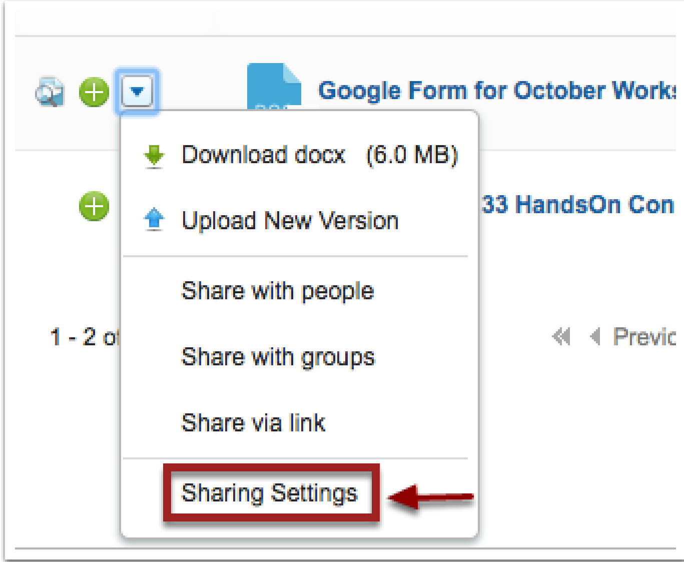


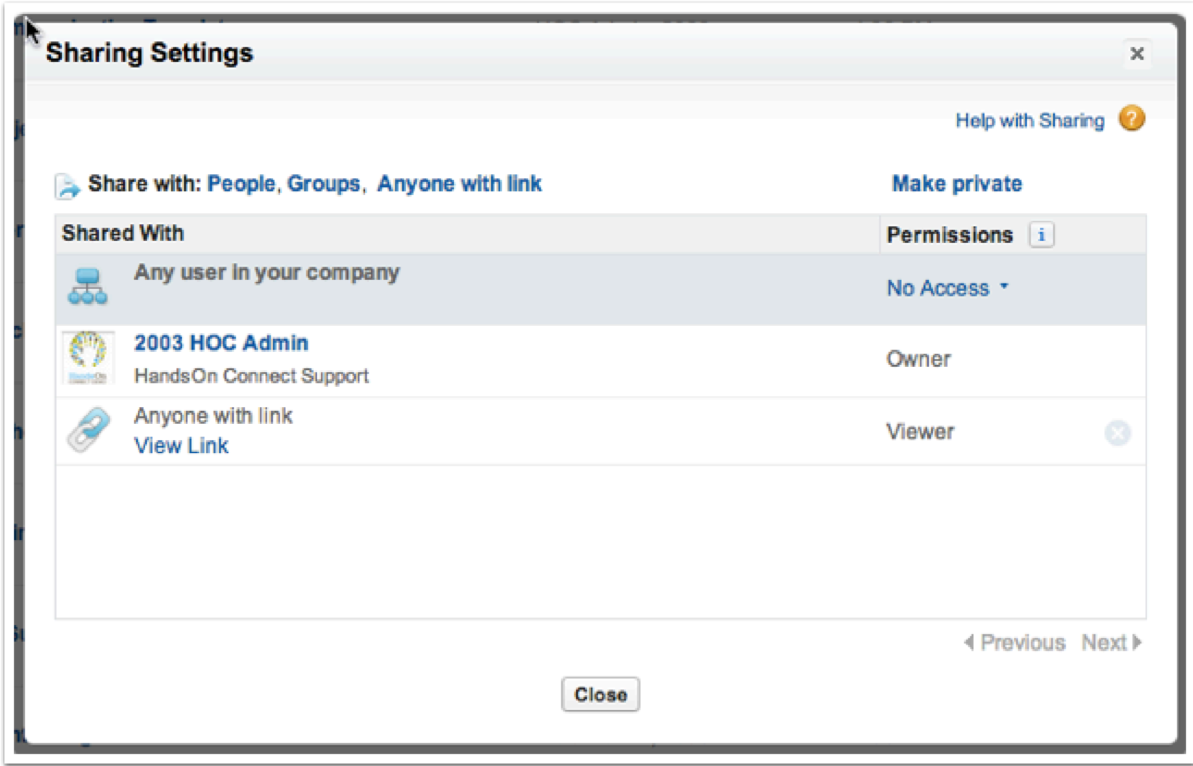
Share Via Link

This will give you a secure URL that you can use as a link to the document on the public website. Copy it to your clipboard.



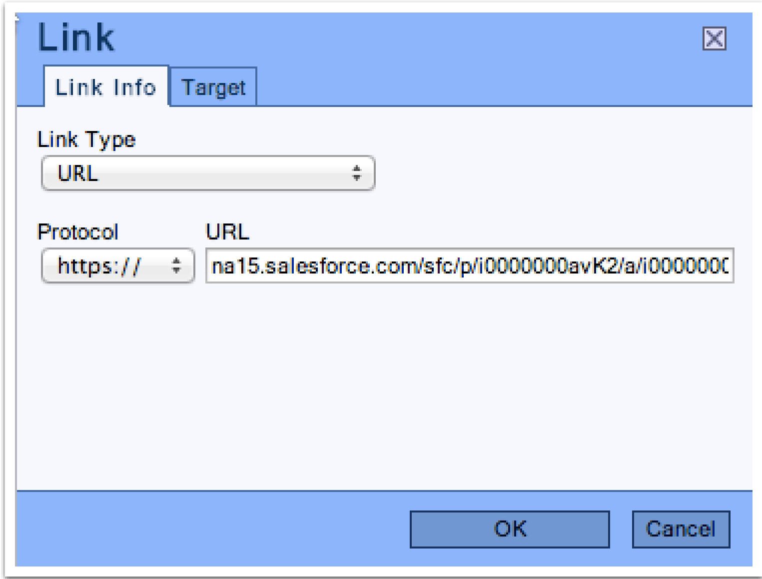
You'll see the sharing that you've enabled in the Sharing settings for this file.


Google Form for October Work
Download docx (6.0 MB)
Upload New Version
33 HandsOn Con
Share with people
Share with groups
Share via link
Sharing Settings
Previc


Sharing Settings
Help with Sharing
Share with: People, Groups, Anyone with link
Make private
Shared With
Permissions
Any user in your company
No Access
2003 HOC Admin
HandsOn Connect Support
Owner
Anyone with link
View Link
Viewer
Previous Next
Close

Click **Close**

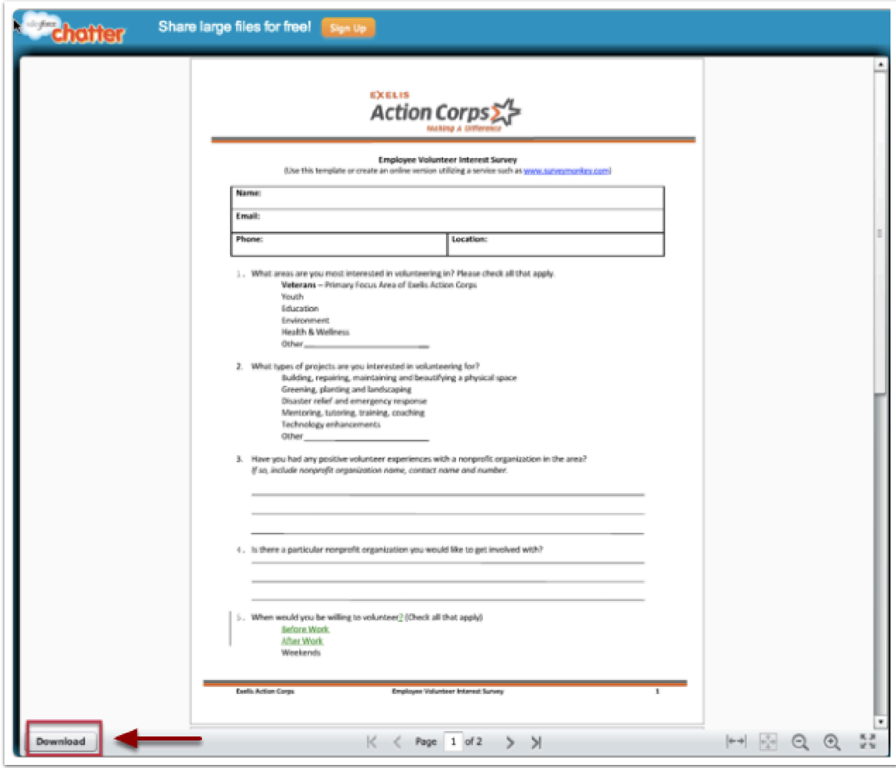
Use the URL as a link for the document using the CMS.



Paste the link into the URL field, and (if desired), set the target to open the link in a new window or tab.

Links appear on the public site - and when clicked - open up in a chatter 'viewer'

The document as viewed via the public site

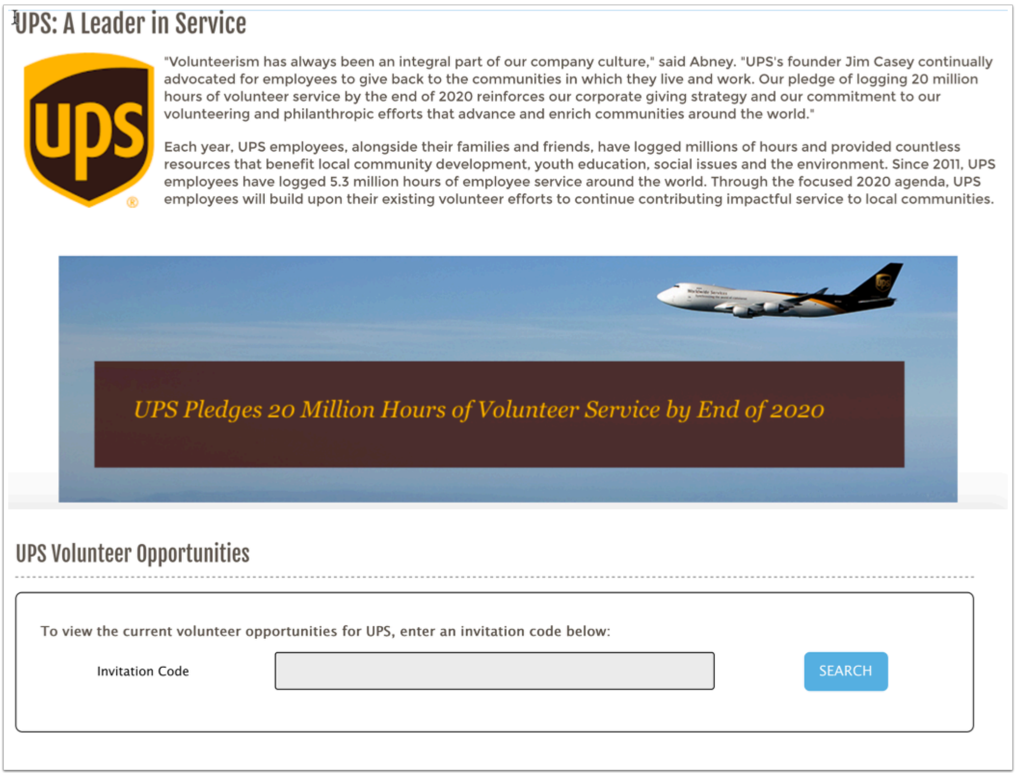


The link (which can also be emailed to anyone), opens a secure Chatter Page, and makes it possible to view pdfs, Microsoft Words Docs, or a variety of different document types right in your browser. People can download the original file by clicking on the download link in the left corner!

Controls on the bottom allow you to view one page at a time, and zoom the document as needed to see it clearly.

How to create a Business Page

There is a special functionality on the site designed to provide an ease of use feature for Corporate Partners who have 'private opportunities' that require an invitation code and don't appear on the public site through the normal calendar or search.



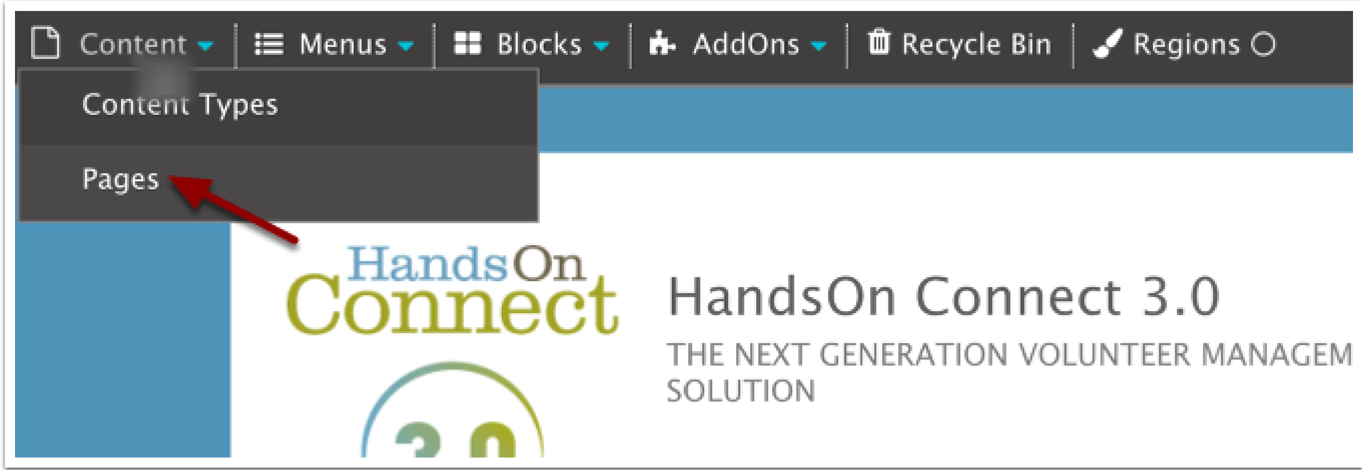
The CMS can automatically create and publish pages that combine an organization's "Business Description" with a Search box requiring just a company's invitation code for their private opportunities.

When an employee or guest enters the invitation code, this page is refreshed with a listing of the company's private opportunities.

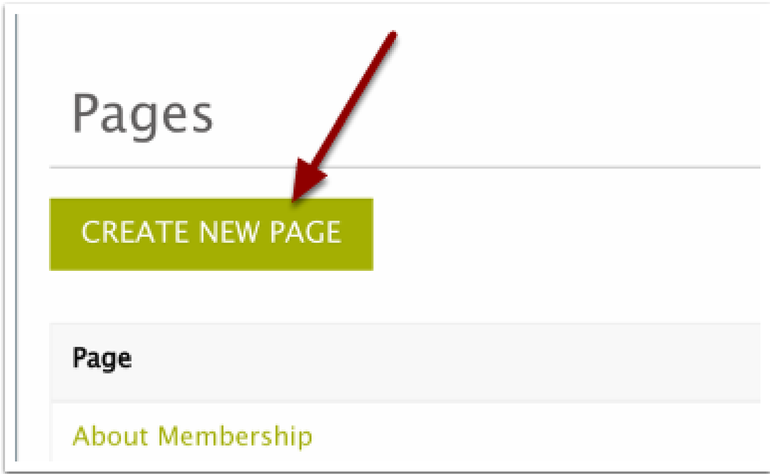
Note: If a volunteer is logged in, and they are associated with that organization (instead of the default 'individual" organization - they will not need to enter an invitation code. The search results will automatically appear for any volunteer associated with that organization.

Let's create a business page!

In the CMS, go to Content, choose pages and click on New Page



Next click on New Page and add your desired page content



Next check the box next the Corporate Page field and it will expose the Salesforce organization ID.

Get the organization ID of the organization

Go to Salesforce and open the Organization record of the company related to your Corporate Page. The easiest place to find the Salesforce organization (account) ID is to copy it from the URL, for example:

Salesforce Lightning:

`https://na00.lightning.force.com/lightning/r/Account/`**`0016A00000ET8XIQA3`**`/view`

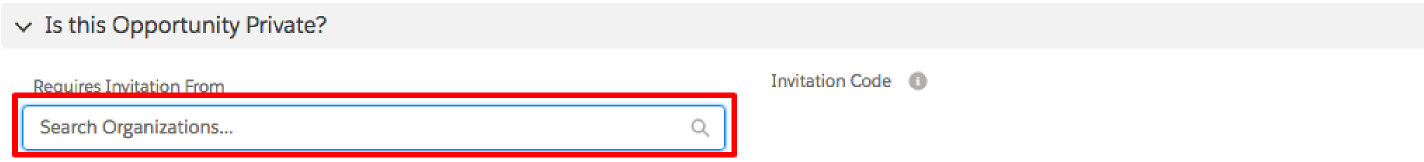
Salesforce Classic:

`https://na00.salesforce.com/`**`0016A00000ET8XIQA3`**

Also, in the organization's Salesforce record, make sure that you set an Invitation Code.

Configuring Volunteer Opportunities

To associate a Volunteer Opportunity with a Corporate page, go to your volunteer opportunity select the related Organization in the *Requires Invitation From* field:



Please note that if some of the fields indicated in this article are not available, it may be that they have not been added to page layout you are using.

Sharing Portal Home Pages

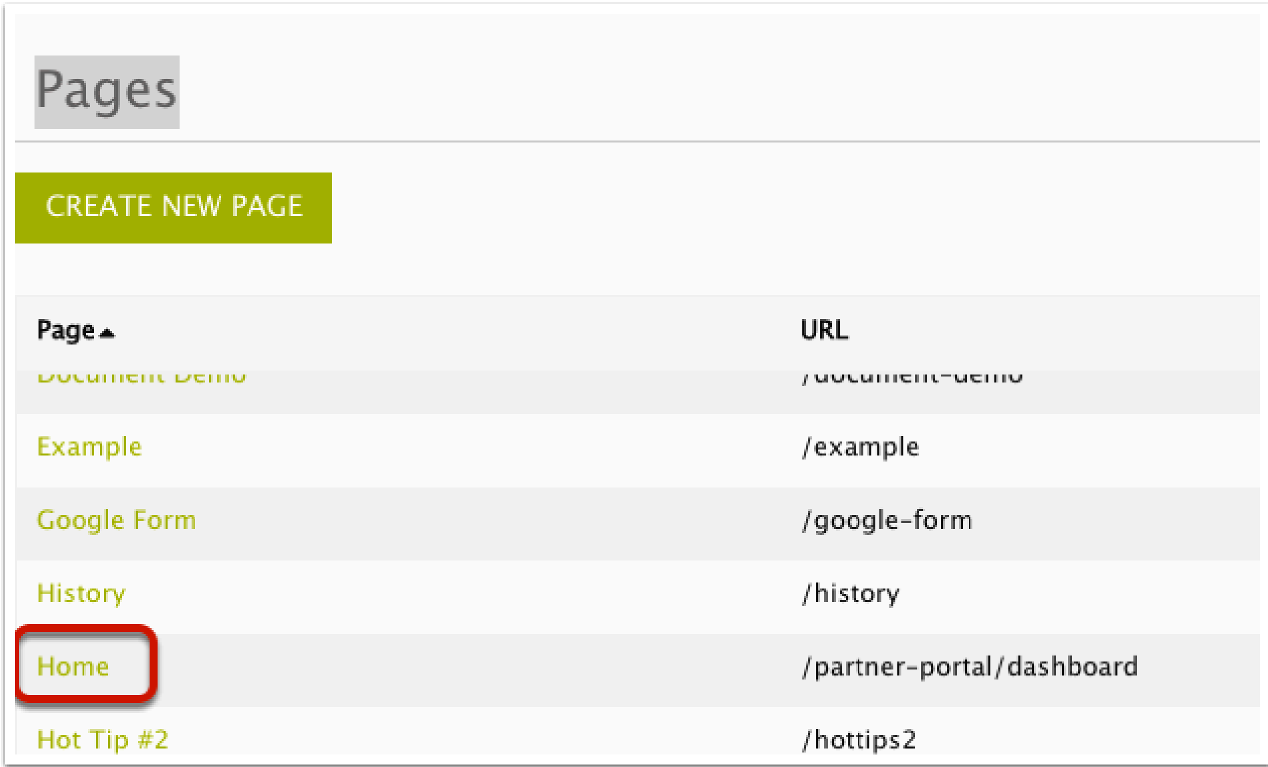
In the Sharing Portal, the first page that is visible when a sharing portal user logs into the portal is the "Home" page. It has the URL /dashboard and is a system page that cannot be deleted.

In the CMS this page has a special characteristic that allow you to create different home page content depending on which profile a user logs in with. This allows you to have one home page for Partner Staff and another home page for Volunteer Leaders..

To Populate Home Page Content

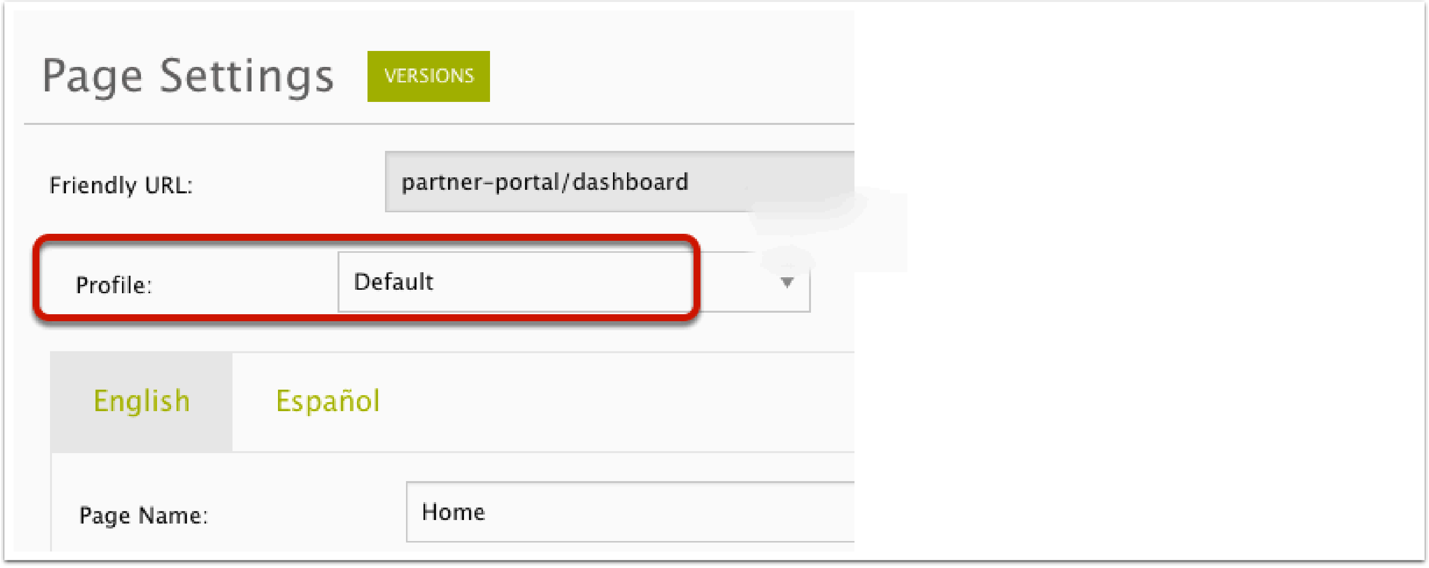
Go to the content menu and select Pages.

Select the page called "Home"



Unique to this page is a picklist that identifies the profile of the user logging in:

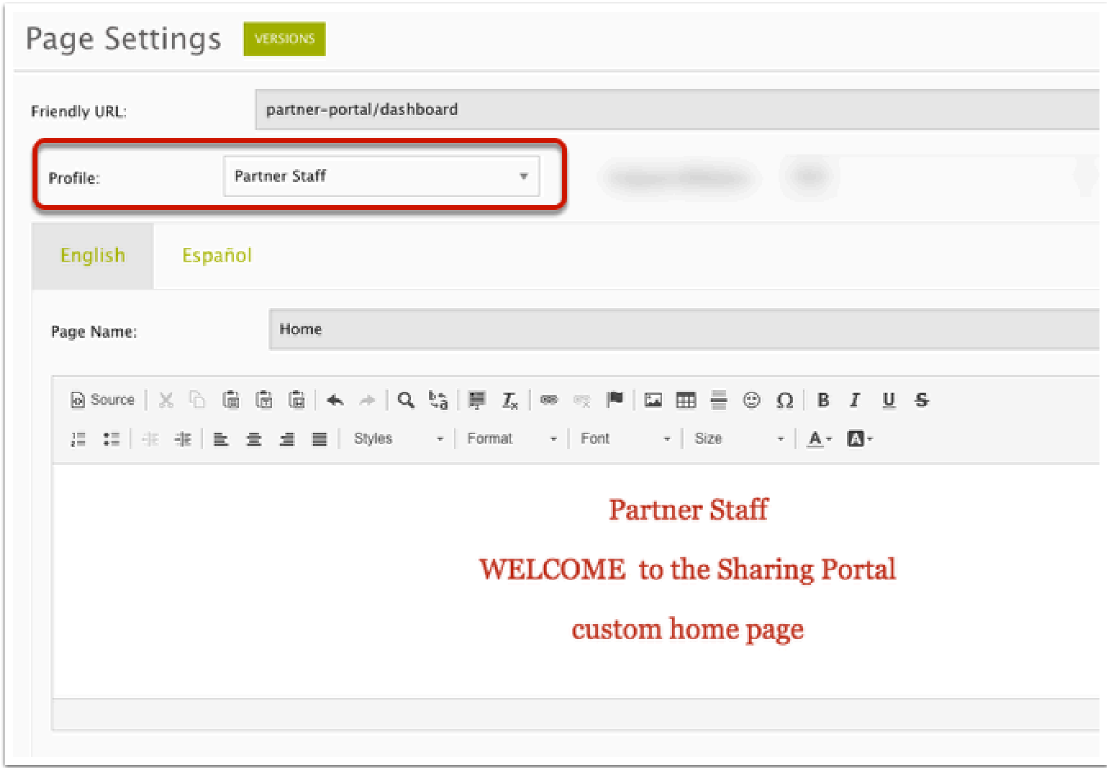
All users will see a picklist called "Profile".   For users who have a customized instance of HandsOn Connect, also visible may be a picklist called "Program Affiliation."

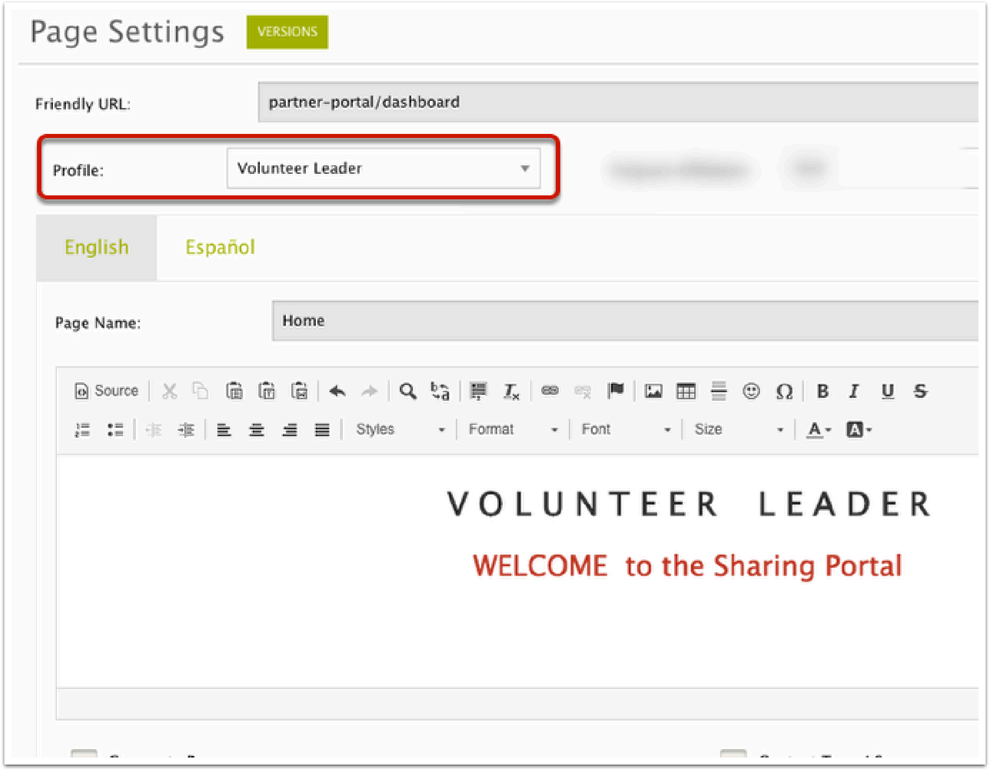


If you want all profiles to see the same page -- select "Default" and put your page content into the WYSIWYG box below.

If you wish to create separate content for individual profiles, then select the profile name, and put the content for THAT profile into the WYSIWYG editor.

You can create separate pages for each profile:





Hit Save to save the multiple versions of your Home Page.

There is a paid customization option to add an additional field to the contact record called "Program Affiliation" which will make it possible to offer additiional home page variations.

When this customization is enabled -- you'll be able to create multiple program affiliations in the contact record - and then define a home page based on a combination of profile and Program Affiliation".

If you have a business need for additional sharing portal home pages with specialized content for partners or volunteer leaders that are associated with specific programs, please open a zendesk ticket with the subject: Request for pricing for additional Sharing Portal Home Pages for programs.

In the ticket, give the details of the various programs which will need their own individualized sharing portal home pages. .

Simple GDPR Notice (Sample)

The General Data Protection Regulation (GDPR) which goes into effect on May 25th, 2018. GDPR is a major step in protecting the privacy of European Union (EU) residents, giving them more control over what, how, why, where, and when their personal data is used.

This document is meant to provide a very simple sample to get you started with your GDPR notice. Make sure to consult with your legal counsel.

GDPR PRIVACY NOTICE (Sample)

Privacy Notice

We are committed to safeguarding the privacy of personal data. This Privacy Notice outlines the collection, use, and disclosure of personal information provided to our users, clients, partners, and constituents. When information is submitted to us, or you use the our websites and other services, you consent to the collection, use, and disclosure of that information as described in this Privacy Notice.

Use of Information

We collect and processes Personal Information and Sensitive Personal Information from individuals who use our services or our customers only as necessary in the exercise of our businesses legitimate interests, functions, and responsibilities to deliver our products and services. Personal Information is collected from users and customers and shared with internal and external parties as necessary and in the course of providing our products and services.

For purposes of this Privacy Notice, Sensitive Personal Information is defined as race, ethnic origin, religious or philosophical beliefs, health data, sexual orientation, and criminal convictions.

For purposes of this Privacy Notice, Personal Information refers to any other information concerning a natural person that is created by or provided to us from or concerning users and customers.

Third Party Use of Sensitive Information

We may disclose your Sensitive Personal Information and other Personal Information as follows:

- Consent: We may disclose Sensitive Personal Information and other Personal Information if we have your consent to do so.
- Emergency Circumstances: We may share your Personal Information, and Sensitive Personal Information when necessary to protect your interests and you are physically or legally incapable of providing consent.

- Employment Necessity: We may share your Sensitive Personal Information when necessary for administering employment or social security benefits in accordance with applicable law or any applicable collective bargaining agreement, subject to the imposition of appropriate safeguards to prevent further unauthorized disclosure.
- Public Information: We may share your Personal Information and Sensitive Personal Information if you have manifestly made it public.
- Archiving: We may share your Personal Information and Sensitive Personal Information for archiving purposes in the public interest, and for historical research, and statistical purposes.
- Performance of an Agreement or Services: We may share your Personal Information when necessary to administer an agreement or in the performance of services you have with us.
- Legal Obligation: We may share your Personal Information when the disclosure is required or permitted by international, federal, and state laws and regulations.
- Service Providers: We use third parties who have entered into a contract with us to support the administration our operations and policies. In such cases, we share your Personal Information with such third parties subject to the imposition of appropriate safeguards to prevent further unauthorized disclosure.
- De-Identified and Aggregate Information: We may use and disclose Personal Information in de-identified or aggregate form without limitation.

Security

We implement appropriate technical and organizational security measures to protect your information when you transmit it to us and when we store it in our information technology systems.

Retention and Destruction of Your Information

Your information will be retained in accordance with applicable state and federal laws. Your information will be destroyed upon your request unless applicable law requires destruction after the expiration of an applicable retention period. The manner of destruction shall be appropriate to preserve and ensure the confidentiality of your information given the level of sensitivity, value, and criticality to our operations and organization.

Your Rights

You have the right to request access to, a copy of, rectification, restriction on the use of, or erasure of your information in accordance with all applicable laws. The erasure of your information shall be subject to the retention periods and in accordance with applicable state and federal laws. If you have provided consent to the use of your information, you have the right to withdraw consent without affecting the lawfulness of our use of the information prior to receipt of your request.

Users and customers may exercise these rights by contacting us at dataprotection@handsonconnect.org

Information created in the European Union may be transferred out of the European Union. If you feel we have not complied with applicable foreign laws regulating such information, you have the right to file a complaint with the appropriate supervisory authority in the European Union.

Updates to This Policy

We may update or change this policy at any time. Your continued use of our website and third-party applications after any such change indicates your acceptance of these changes.

Linking to Files and Documents

Attaching Links to Files and Documents in CMS Pages and Volunteer Opportunity Descriptions.

Sometimes you want to make a file (a .pdf document, a word .doc) accessible on a page that appears in the public site.

This might be on a page you create with links to various documents, or you might want to embed a link in a volunteer opportunity description.

There are two ways to do this each with advantages and disadvantages:

Method 1: Share a file stored in Salesforce.
Advantages: the .pdf or even a word .doc can actually be viewed in the browser. It can also be downloaded. This is the preferred method.
Also - you can update the file in SF, and the new version of the file will be accessible without changing the link on the public site.
Disadvantage: If your SF instance is an older one, you may have to make a request to SF to activate the public sharing of files.

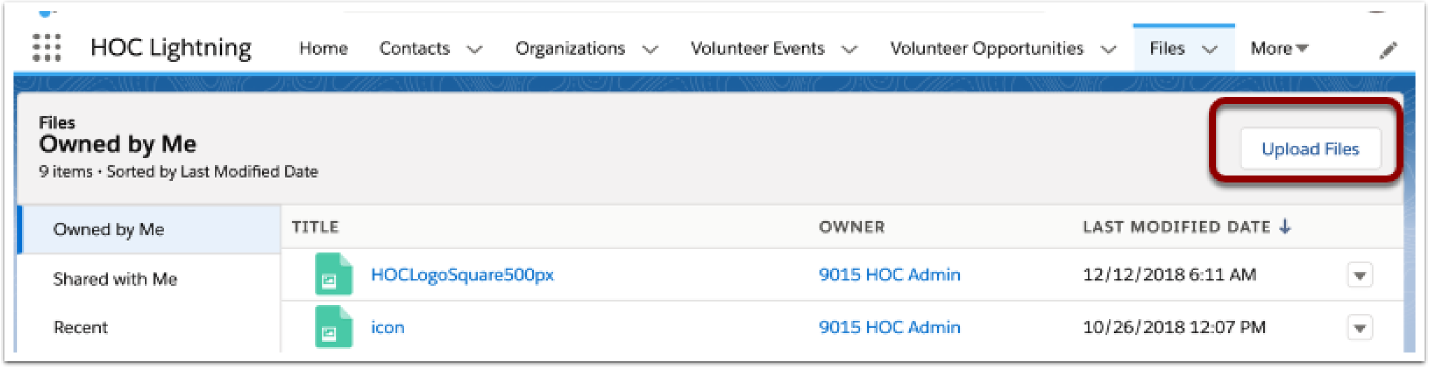
Method 2: Add a file to the CMS.
Advantage: Quick and easy to do when creating a page in the CMS.
Disadvantage: The link to the document will only download the document. It won't be viewable online. And some users may not realize they've downloaded the document.

Method 1: Share a file stored in Salesforce

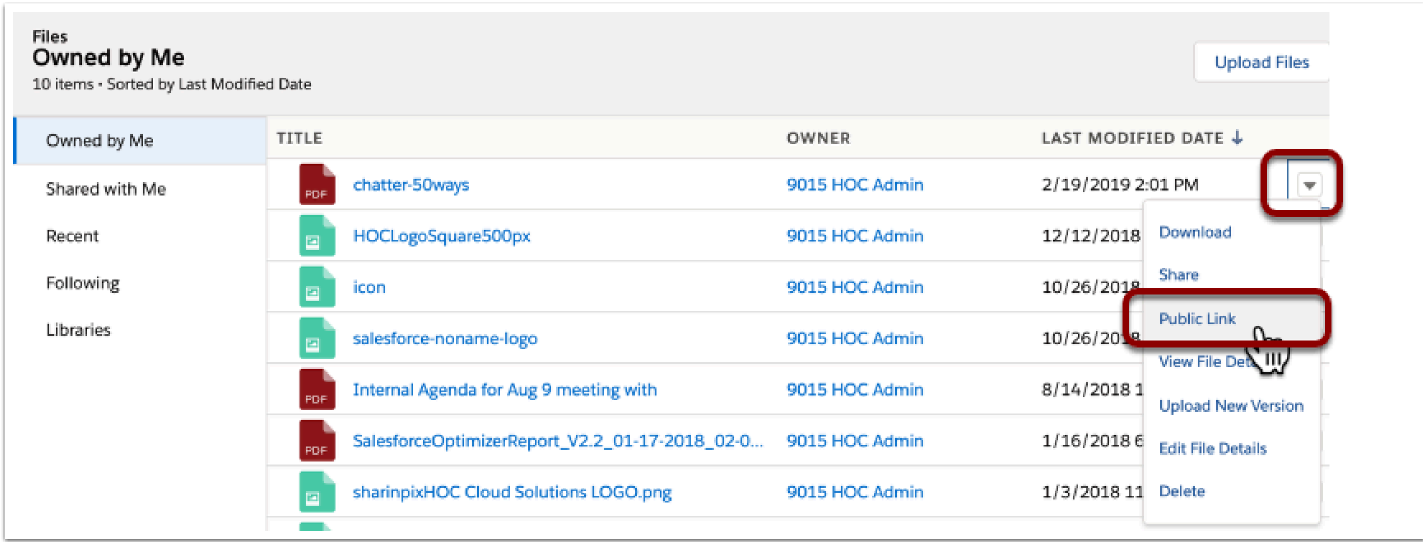
1. Store your document as a Salesforce "File" (not a Salesforce 'Document" or attachment.)
2. Share the document via a "link"
3. Use the link URL as a hyperlink in your CMS content.

Upload and Share a File

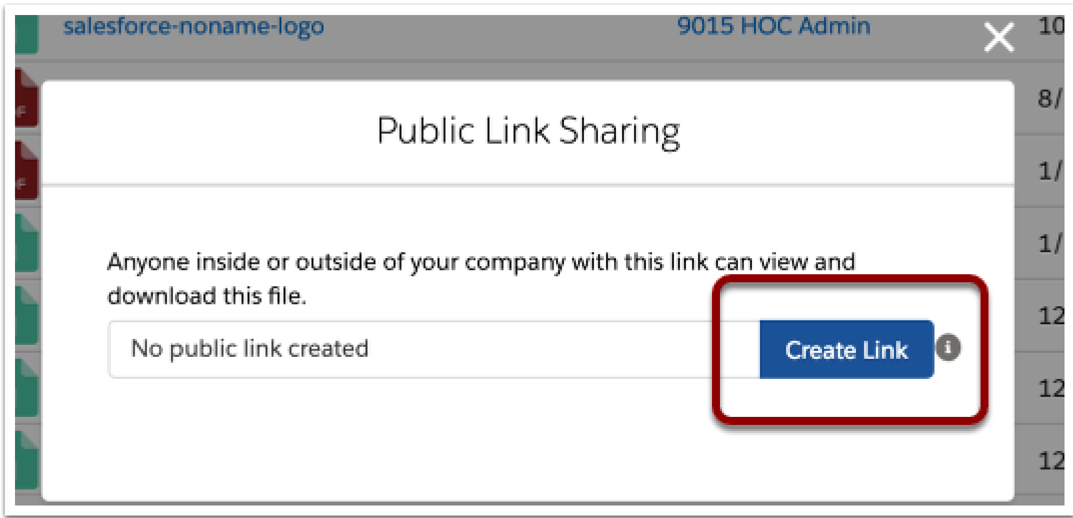
Go to Files, and click on "Upload Files" and upload your .pdf or word .doc



In your Files list, click on the right triangle and choose



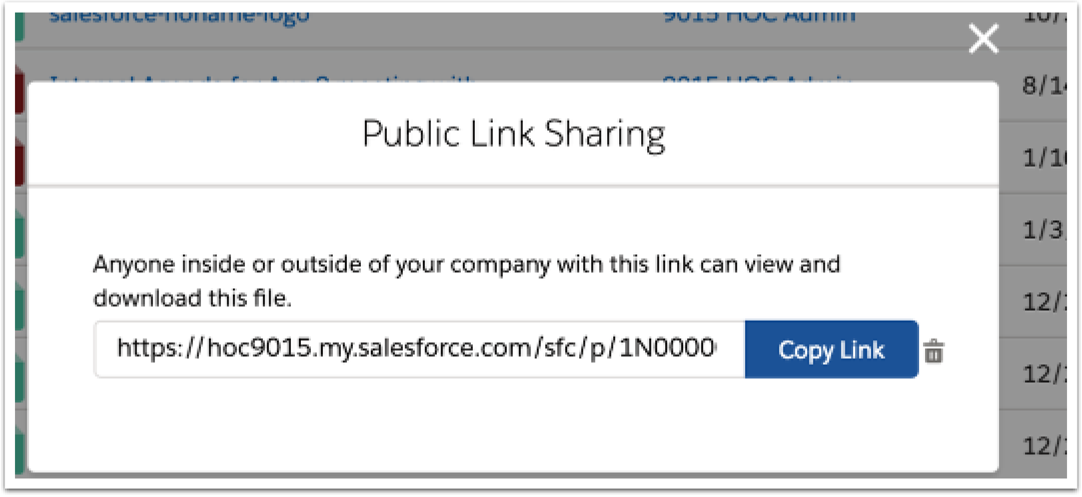
Click on "Create Link"

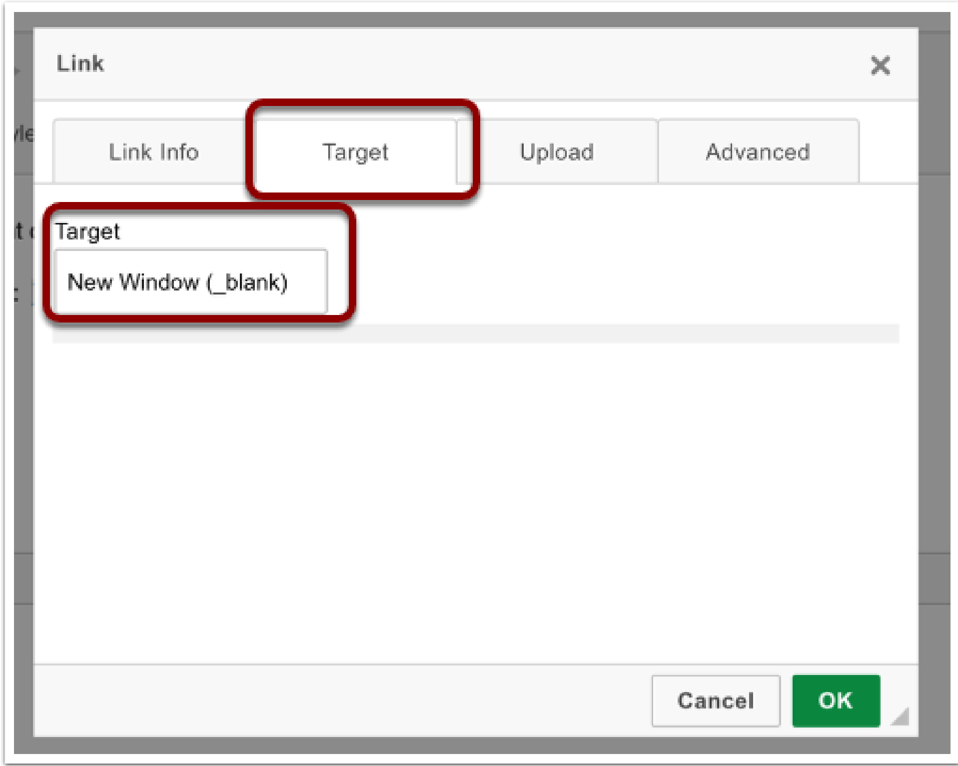


Click on 'Copy Link' to put the URL to the file on your clipboard.

Now use this URL as a link (or menu item) on your public site. Set the 'target" for the link to "New Window (_blank" (so the viewed document will open in a new tab or page). (You can also use this URL as a link within an opportunity description page).

This link will now open the document and make it viewable and downloadable if desired, via your public site.





What to do if you don't have the option to get a public link for your SF File:

Older instances of Salesforce may not have that functionality enabled by default.

Go to Setup / Files / Content Deliveries and Public Links - and make sure a check mark is next to "Public Links can be enabled for users) (Requires Content Deliveries).

If you don't see the setup option "Content Deliveries and Public Links" -- then you have to open a Salesforce Support Ticket and request to activate the feature "Content Deliveries & Enabling Content Delivery Setup".

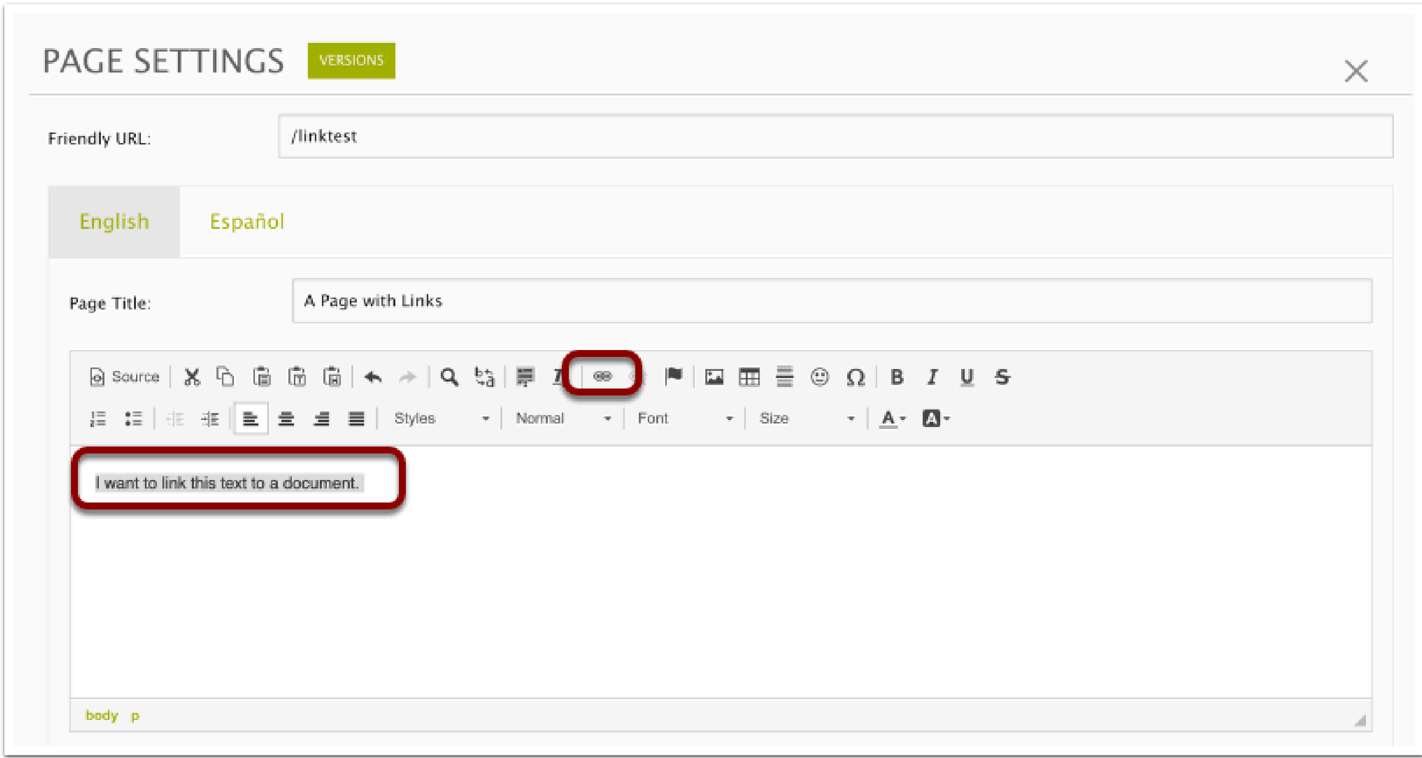
For instructions on making this request to Salesforce Support - see this Article:

https://help.salesforce.com/articleView?id=000240244&type=1

Once you have this feature enabled and set up - its super easy to upload files and get URLs you can use to make those documents accessible from your publkic site.

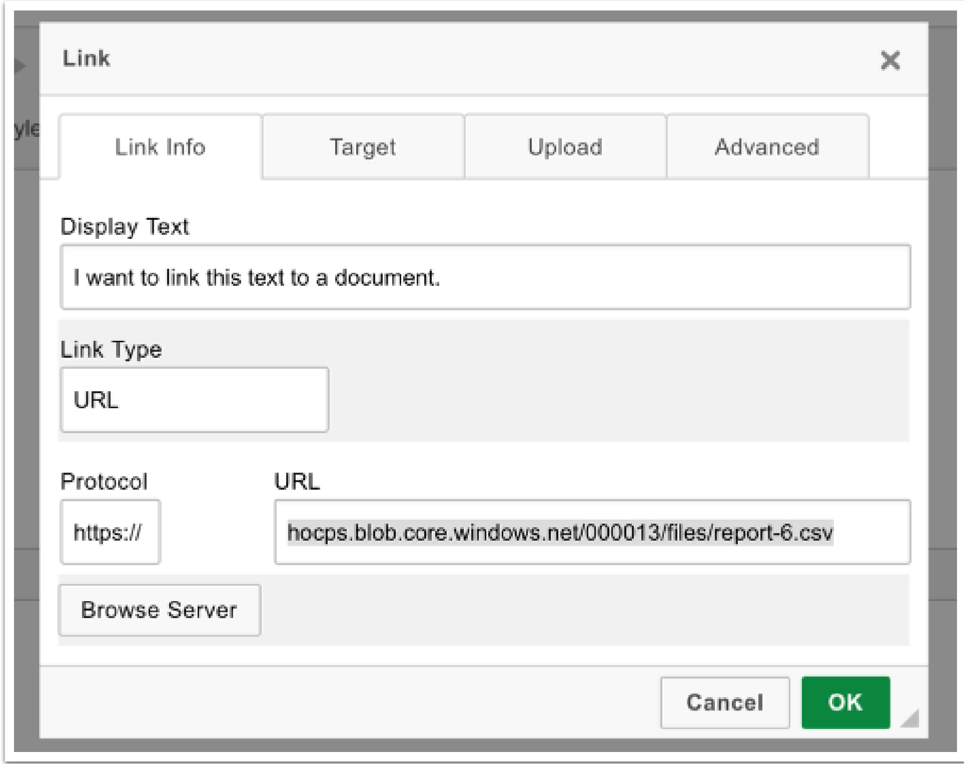
Method 2: Create a link in the CMS and upload a file:

When you create a page of content in the CMS, select the text you wish to link to a document, and click on the 'link" icon:



A popup window will allow you to Upload a document, OR you can click on "Browse Server" where you can select an existing file you've already uploaded.

When you upload the document, the URL of the file, now stored on the server will be shown. Click "OK" and the link will automatically be created to your selected text.



Note: Your linked file will be **downloaded** when the link is clicked on. It will not be visible as a document in the browser as a chatter file would be in Method 1.

If you wish to link a document to an opportunity description, you'll first have to upload the file in the CMS, and then copy the URL to it, and then use that to link to content in the opportunity detail.

Menus

Working with your Site Navigation

Adding a menu links

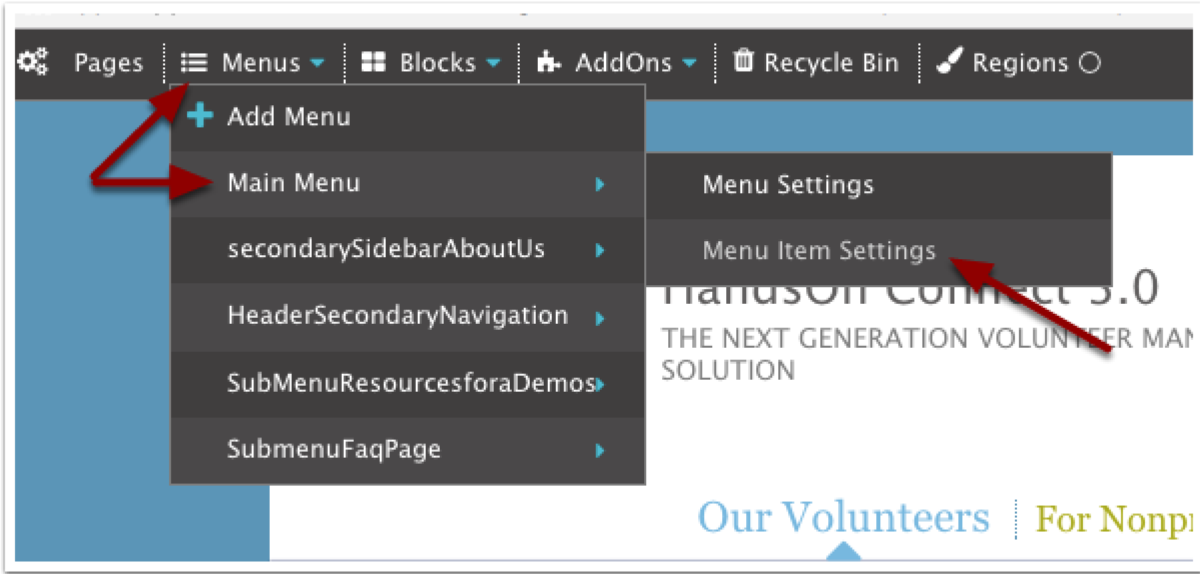
With multiple-page sites, a navigation menu at the top of every page helps visitors find their way around. If you have lots of pages, add submenus.

To start

Click on **Menus**

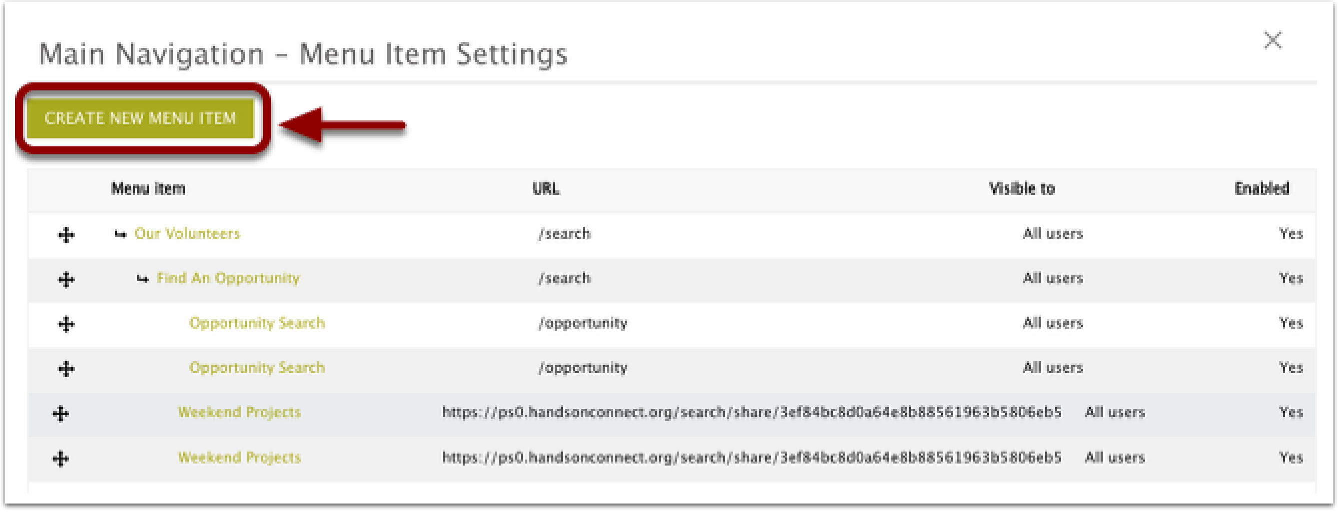
Select **Main Menu**

Select **Menu Item Settings**

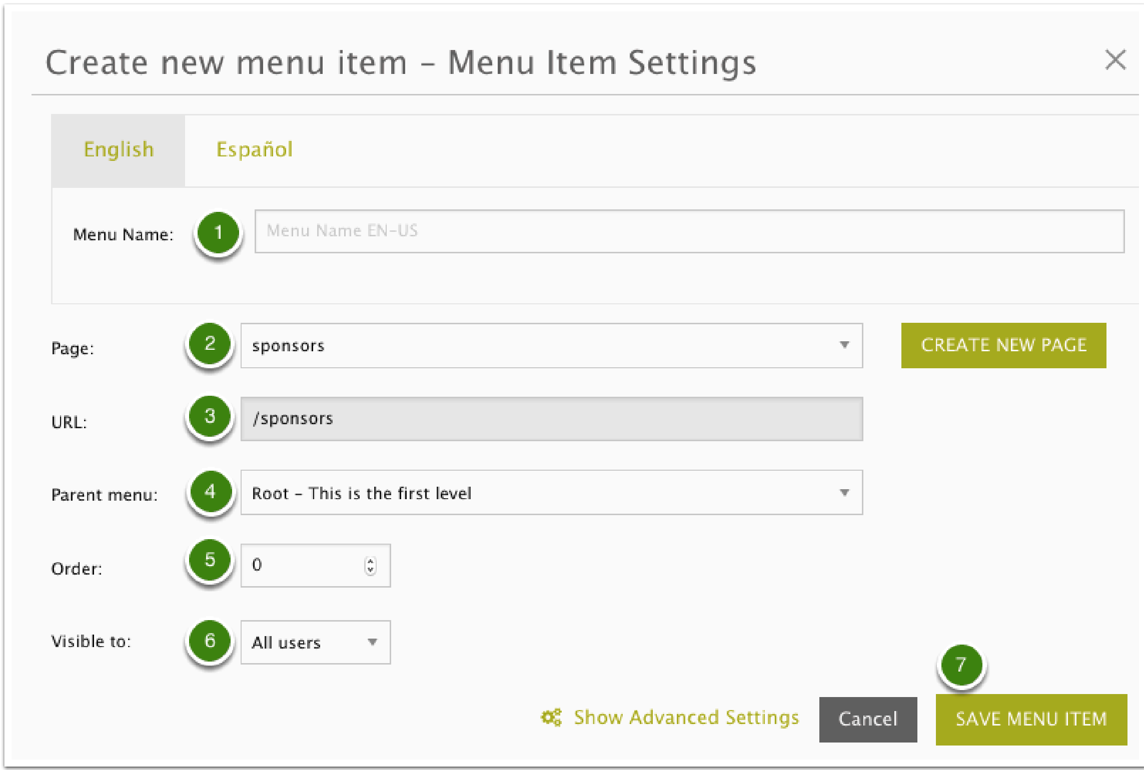


Creating New Menu Item

To add a navigation/menu links, click **Create New Menu Item**,



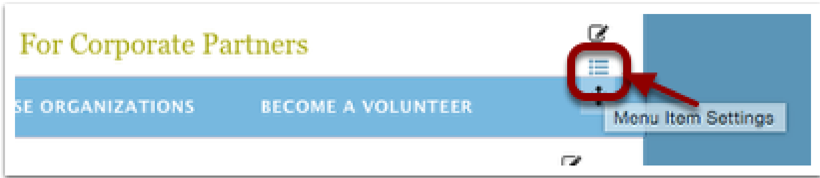
1. **Menu Page:** Enter a Menu Name in the blank field
2. **Page:** Select an existing page to create a Submenu Item, or create a new page by selecting the **Create New Page**
3. **URL:** Please note by selecting an exiting page the **URL:** field will get populated automatically
4. **Parent menu:** Select the Root lavel where you like your page to be under
5. **Order:** Enter the order number you want your page to appear in the navigation menu
6. **Visible to:** Select who can view this page
7. **SAVE MENU ITEM:** Click Save Menu Item to save your entries

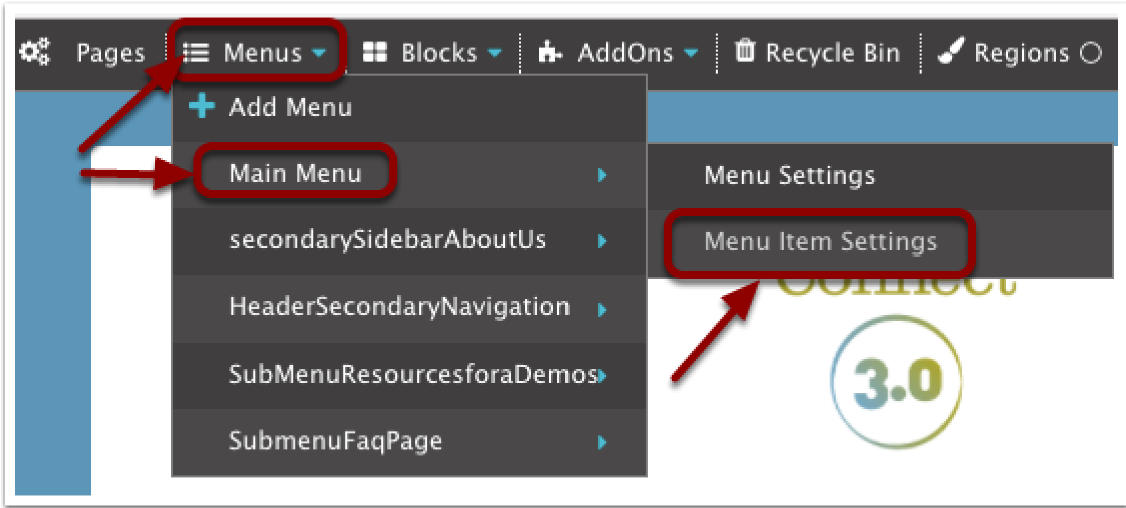


Hiding a Menu Item

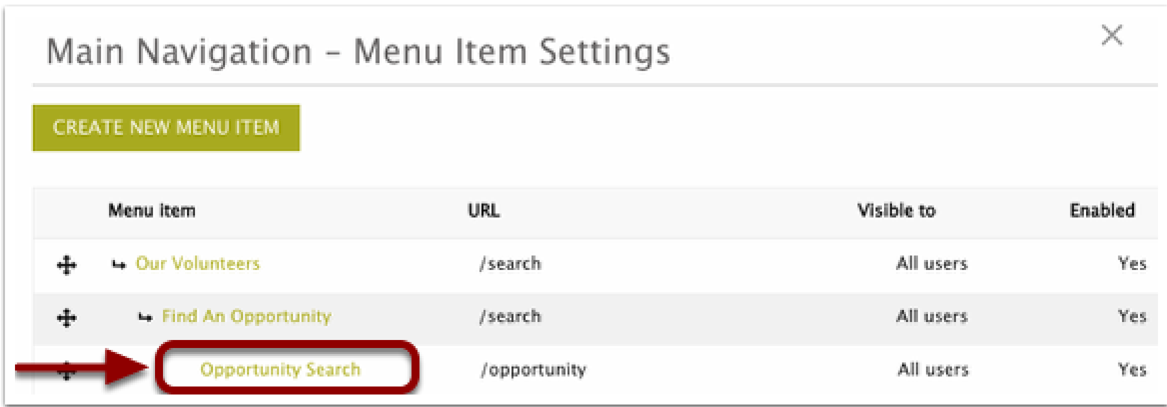
To hide a menu item

1. In the upper menu bar, Click **Menus.**
2. Select **Main Menu**
3. Click on **Menu Item Settings**
4. Or you can select the icon on the top right of your screen



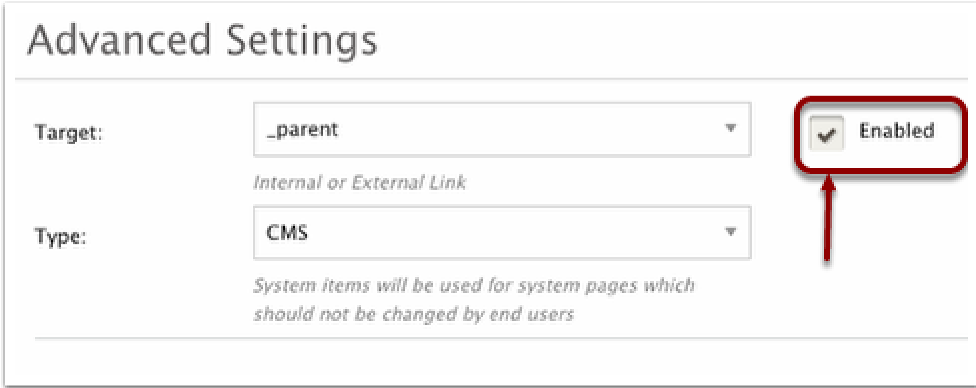


5. From the **Main Navigation - Menu Item Settings**
6. Click on the pages you want to hide on the Internet

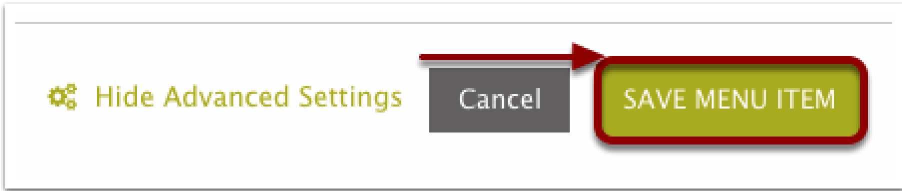


7. Click on **Show Advanced Settings**

8. Uncheck the **Enabled** box.



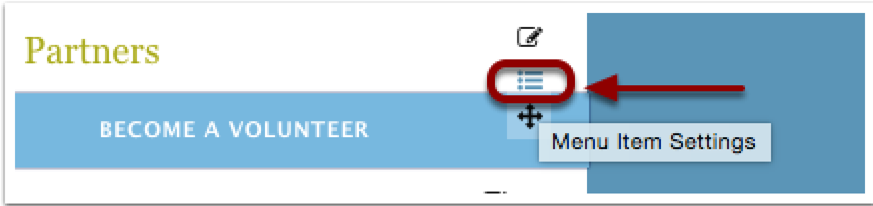
9. Select **SAVE MENU ITEM** to save your work

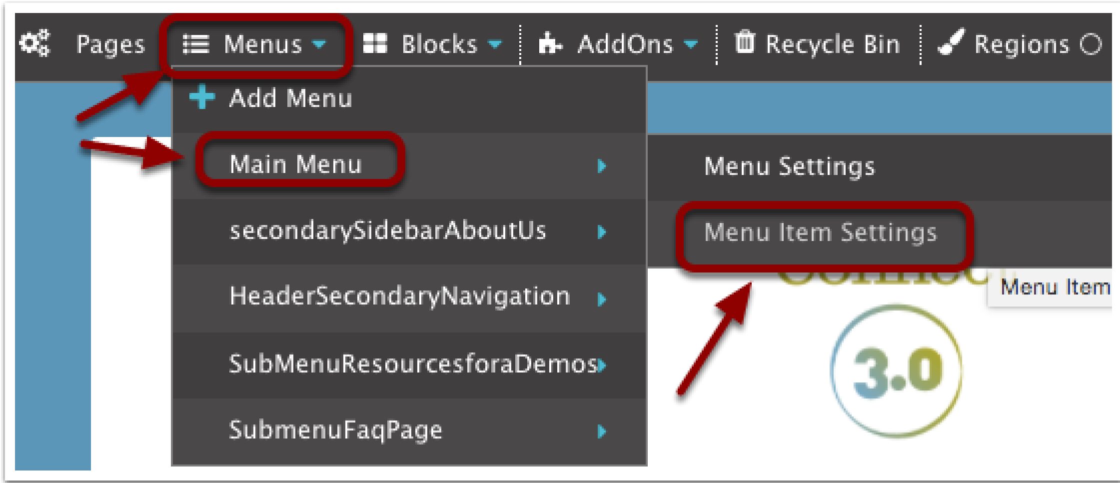


Deleting a Menu Item

To Delete a Menu Item

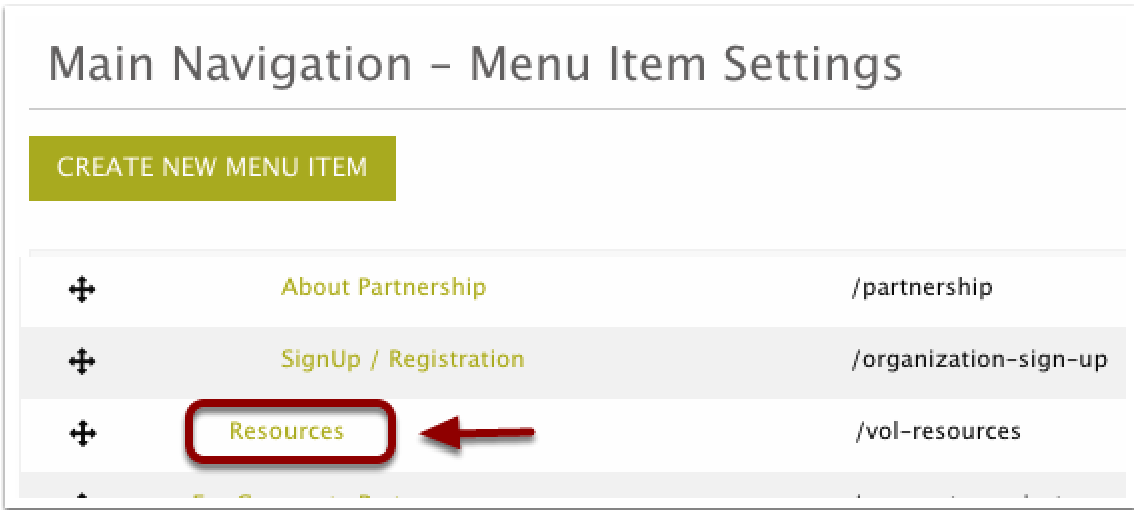
1. In the upper menu bar, Click **Menus.**
2. Select **Main Menu**
3. Click on **Menu Item Settings**
4. Or you can select the icon on the top right of your screen



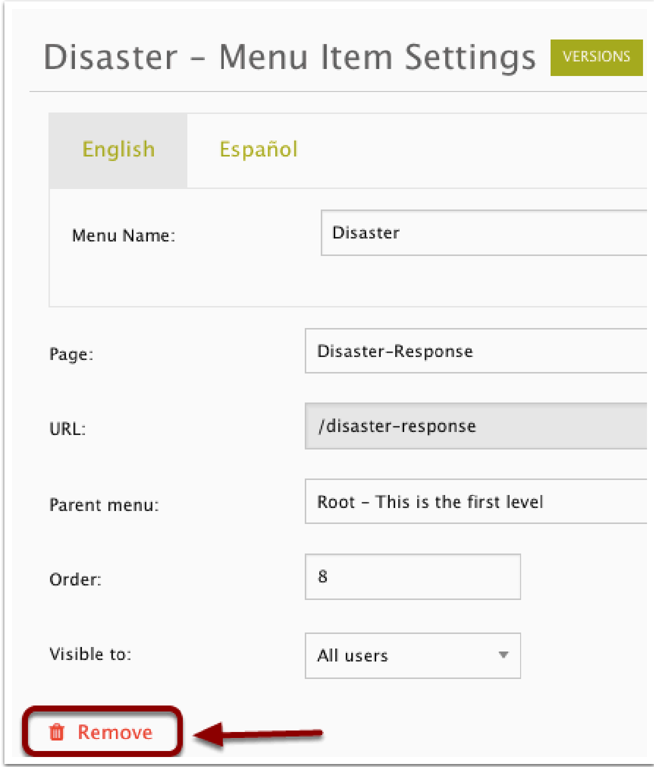


From the **Main Navigation - Menu Item Settings**

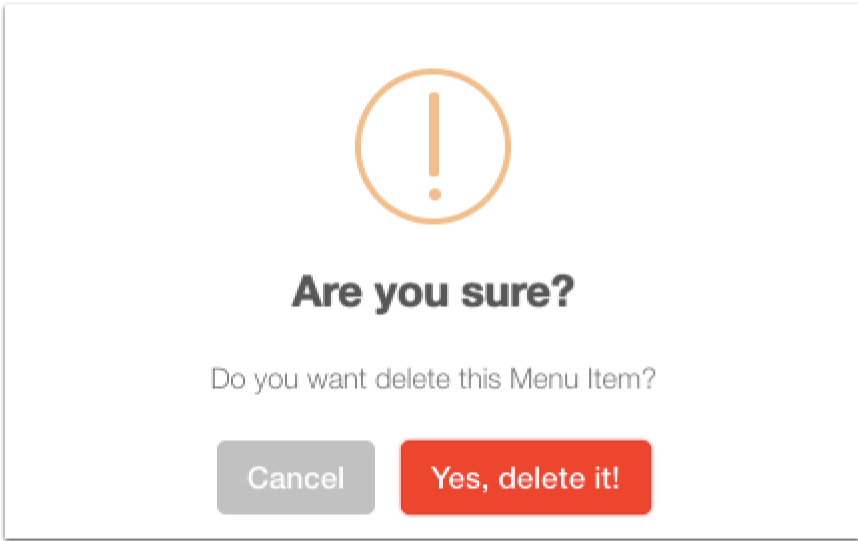
5. Click on the pages you want to delete from the Internet



6. Click **Remove** at the lower left



7. Select Yes, delete it! to remore the item,
8. Or Cancel to discard all changes



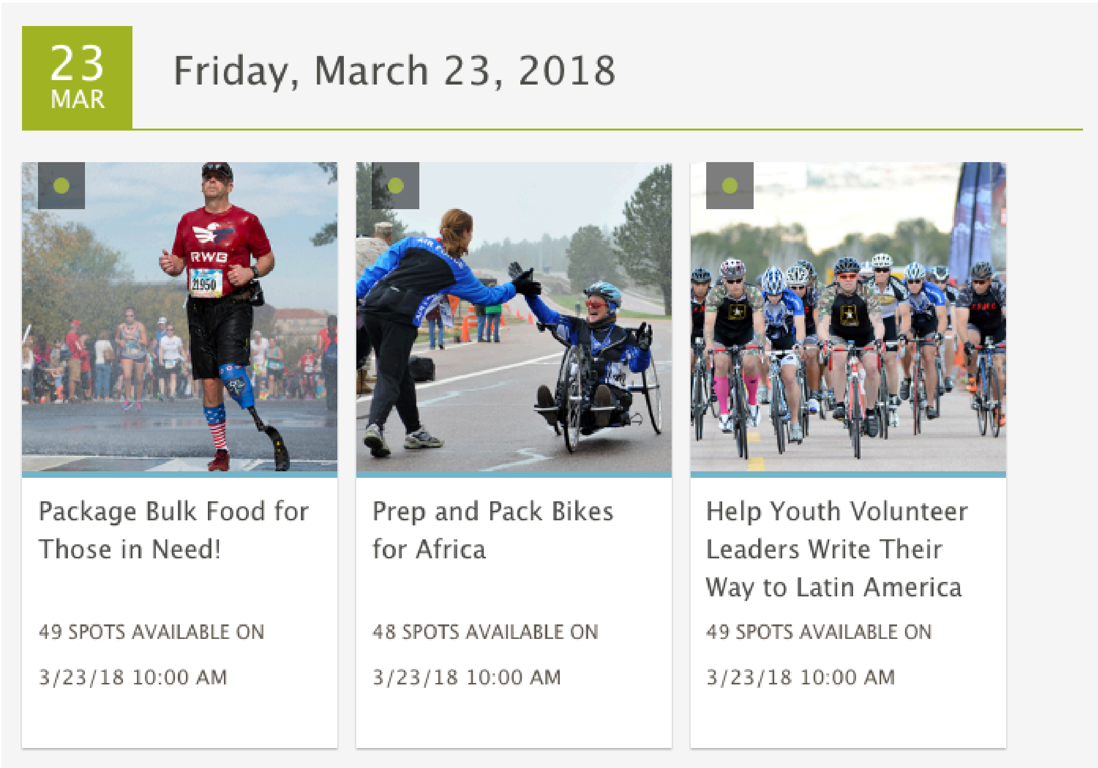
Blocks

Search Results Block

The **Search Results** block allows you to use the new Search Results and Calendar layouts to show your opportunities. These layouts display the results as tiles in a grid layout, where each tile is a volunteer opportunity.

Note that this block requires a good understanding of the CMS and HOC. Hence, it is not enabled by default. If you do not see it in your CMS "Blocks" menu, please contact us at Customer Support.

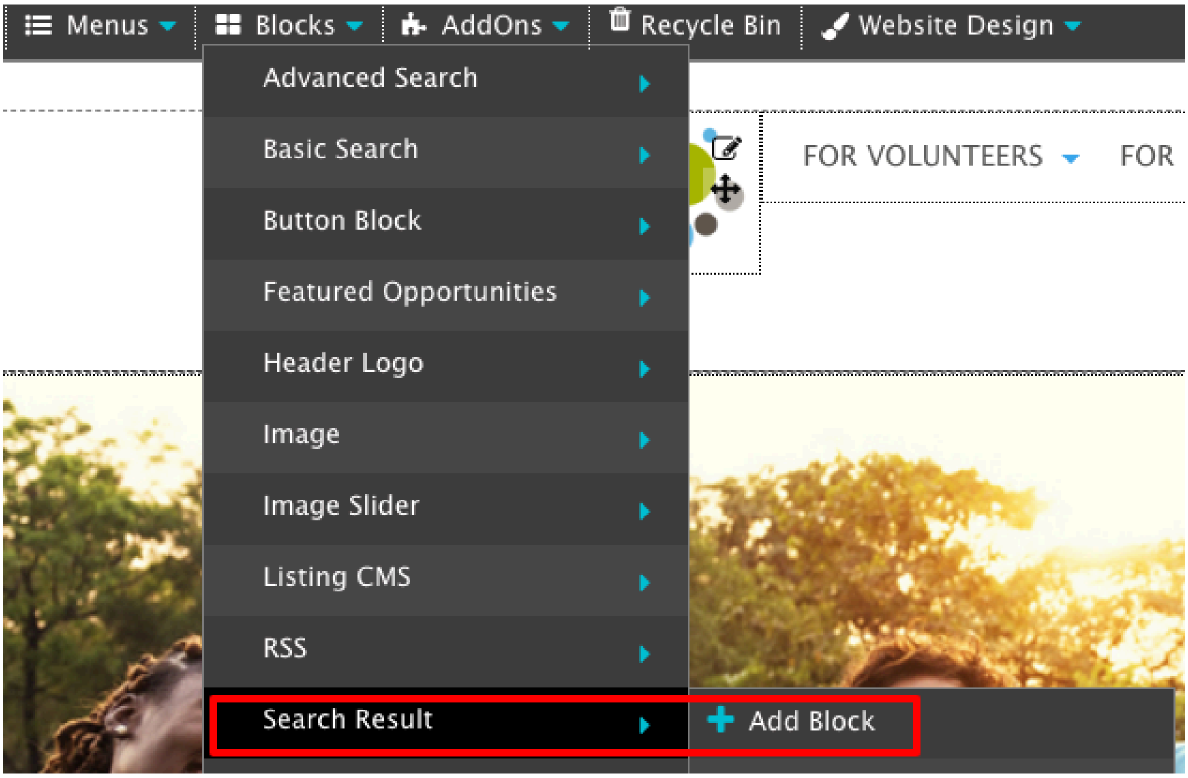
Here is an example of the calendar layout (with Show Images turned on) using the Search Results Block:



As you can see above, the Search Results Block also supports thumbnail images (optional), which you can help automate using a Salesforce Process Builder. See the following related posts:

- How to upload images for use in the Featured Opportunity Block
- Featured Opportunity and Search Results Blocks - Set default images

To get started with the Search Results Block, select "Search Result" from the Block Menu in the CMS utility bar and add a new search result block (note that your available CMS blocks vary depending on the version of HOC that you are using).



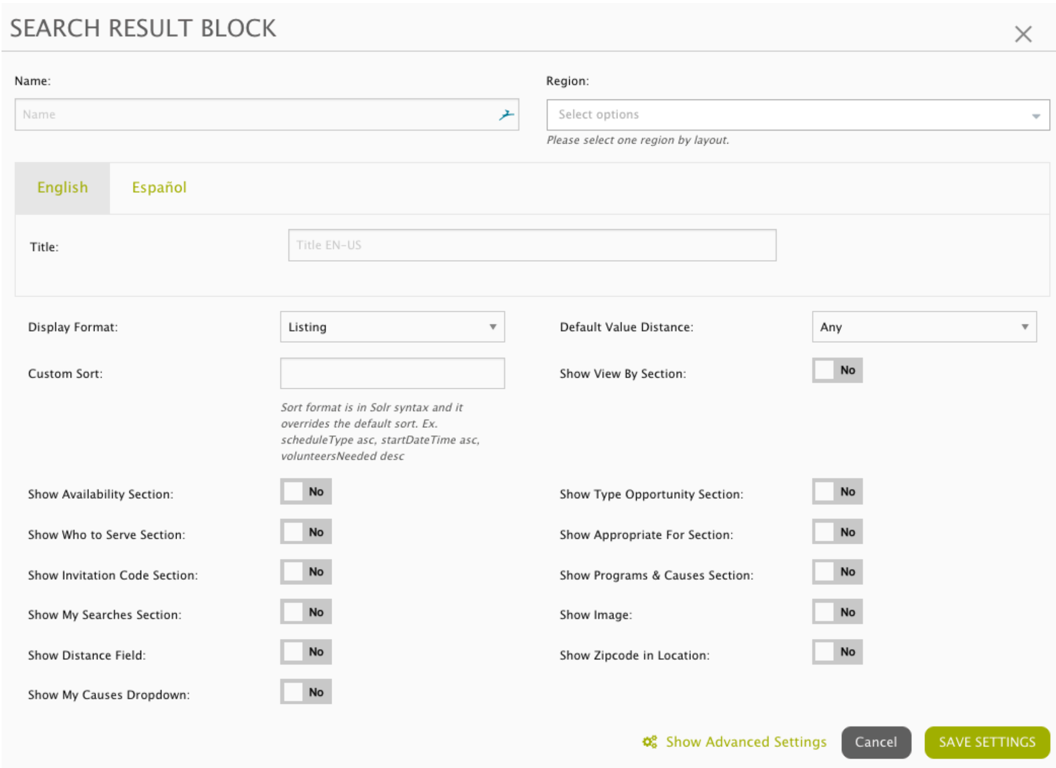
Define the parameters for your block

1. Name your Search Results block. We recommend being descriptive, e.g., "Main Search Results".
2. Select the CMS region where you want your video to appear.
3. Give your block a Title (optional)
4. Set the block settings:
   1. **Display Format**:
      1. **Listing**: Standard Search Results displayed in a grid format ordered by the search criteria selected
      2. **Calendar**: Search results presented in a grid format grouped by day. Only days with opportunities are shown.
   2. **Custom Sort**: ***Leave blank. Do no use this field***. This field is for support staff use only. It makes it possible for us to create custom sort orders if needed for special cases.
   3. Set **Default Value Distance** if you want to restrict the search radius (in miles or kilometers)
   4. Set the **Search Options and Filters**. This is what the user sees and the options they have the narrow their search (labels are self-explanatory). Toggle on or off as desired.
      1. Show Availability Section
      2. Show Who to Serve Section
      3. Show Invitation Code Section
      4. Show My Searches Section
      5. Show Distance Field
      6. Show My Causes Dropdown (not in use - future improvement)
      7. Show Type Opportunity Section
      8. Show Appropriate For Section

        9. Show Programs & Causes Section

    5. If you are using images for your opportunities, you can choose the display them by toggling on the **Show Image** option.
    6. **Show Zipcode in Location**: Displays city and zip to the search result tile for each opportunity.

5. Use the advanced settings to specify which page(s) you want this block to appear on, and in what order relative to other blocks or content on the page.
6. Save the Settings of your new block.
7. You are done!



Linking your Search Results Block to a Basic Search Block

Once you create a Search Result Block, it will be available in your Basic Search Blocks under the **Redirect to Search** settings. If you select here a Search Result Block when a user starts a search on the related Basic Search Block the results will be displayed using your Search Result Block, instead of the "classic" search results.

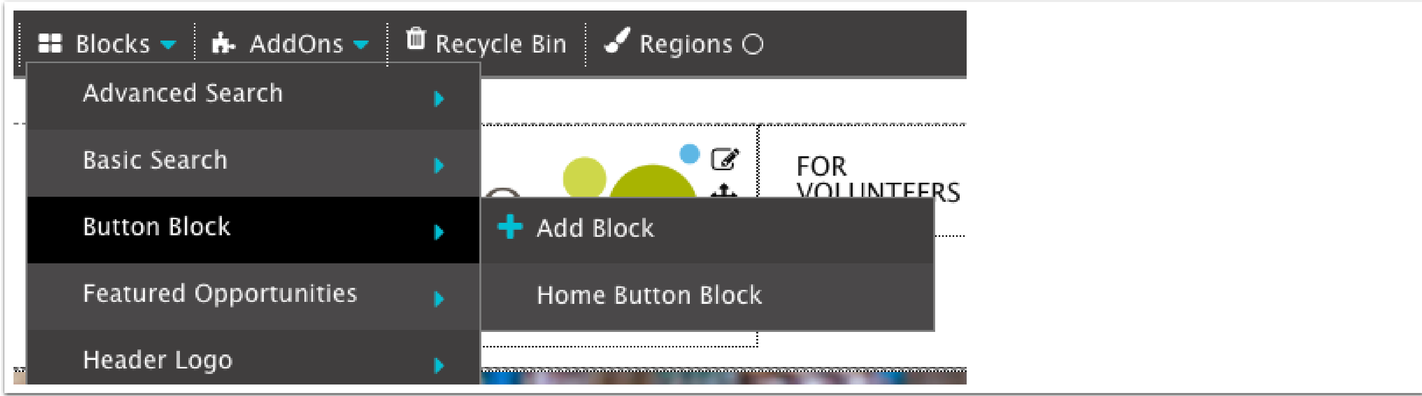
Basic Search Block

Content Coming Soon!

Button Block

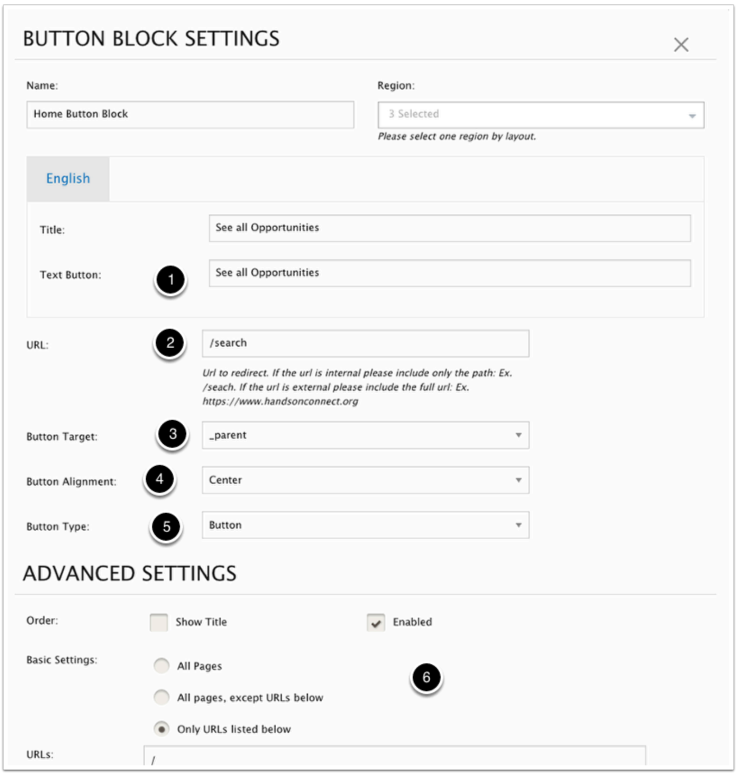
A button block allows you to easily create a button in the CMS and set the URL you are sent to if you click the button.

Select Button Block from the Block Menu and create a new button block.

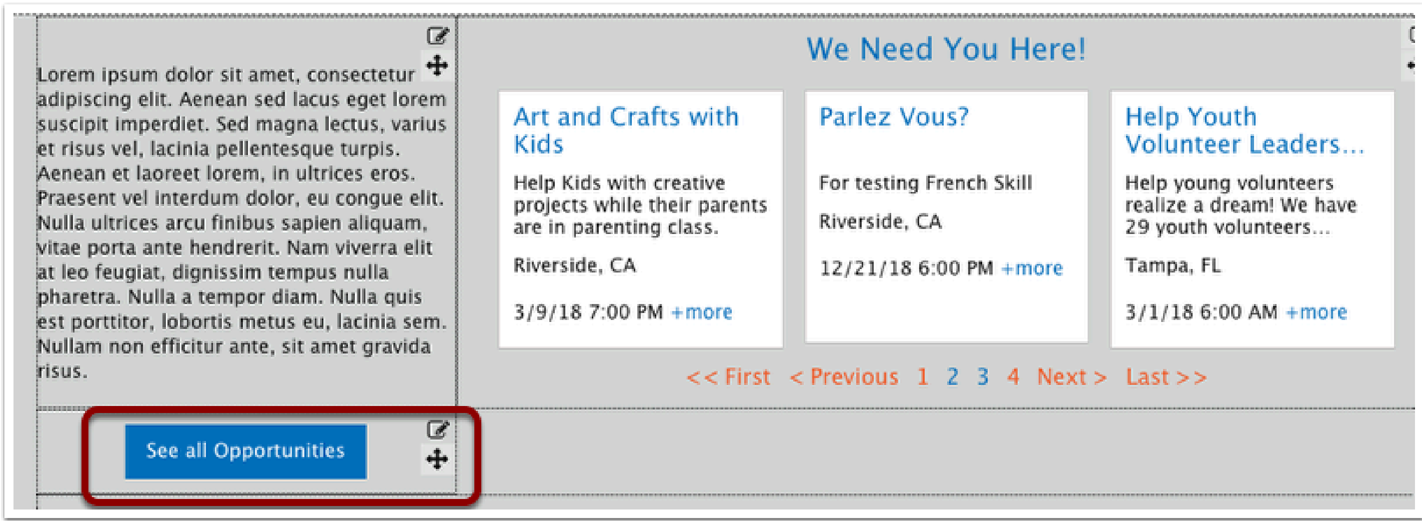


Define the parameters for your button.

1. Specify the text you wish to appear in your button.
2. Set the URL you wish the user to go to when they click the button
3. Do you want the button to open the page directly (_parent), or in a new tab? (_Blank)
4. How do you want the button aligned.
5. You can choose to present a button, or just a plain link. (Note: The button is automatically set to match the style and color of other buttons in your site theme).
6. Use the advanced settings to specify which page(s) you want the button to appear on, and in what order relative to other blocks or content on the page.



What the button looks like on your page



You can edit the button by clicking on the pencil icon to the right of the block.

Alternative Method: Using the HTML Block

If you are comfortable with HTML and inline CSS, you can also use an [HTML Block](#) to add your Social Media icons and links. This will give you more flexibility and customizability.

Featured Opportunities Block

The Featured Opportunity Block has a myriad of features and has its own chapter dedicated to it.

Click here to read about the Featured Opportunity Block

Header Logo Block

Content Coming Soon!

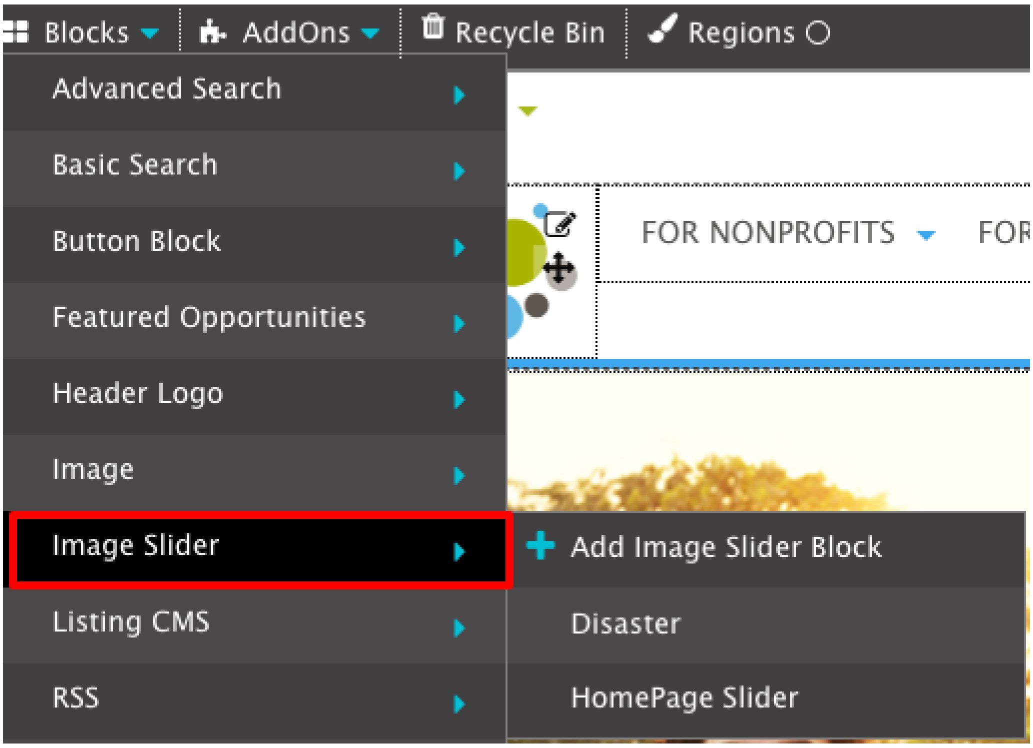
Image

Content Coming Soon!

Image Slider

Image Slider

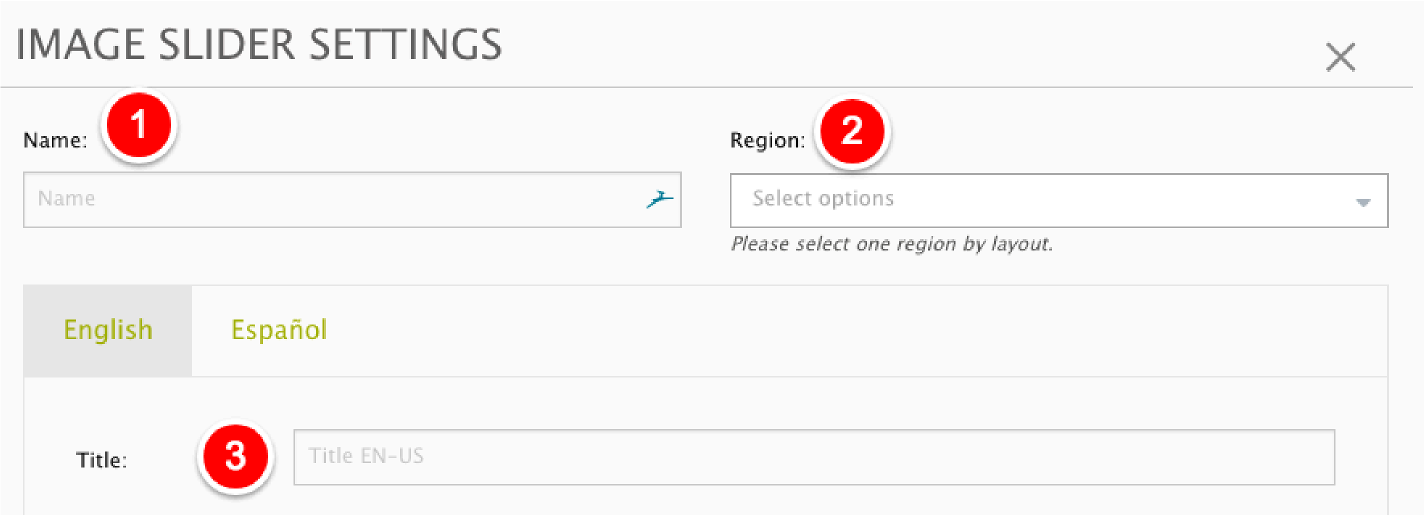
The Image Slider Block allows you to easily create an image slideshow so you can show multiple images in one place on your page. To start, select Image Slider from the Block Menu and create a new button block.



Basic settings

Define the basic parameters for your block:

1. **Name:** Name of the block. Be descriptive but keep it short.
2. **Region:** Select layout(s) and region(s) where the block should be displayed.
3. **Title:** Title shown to the end user if Title is turned on in the Advanced Settings.

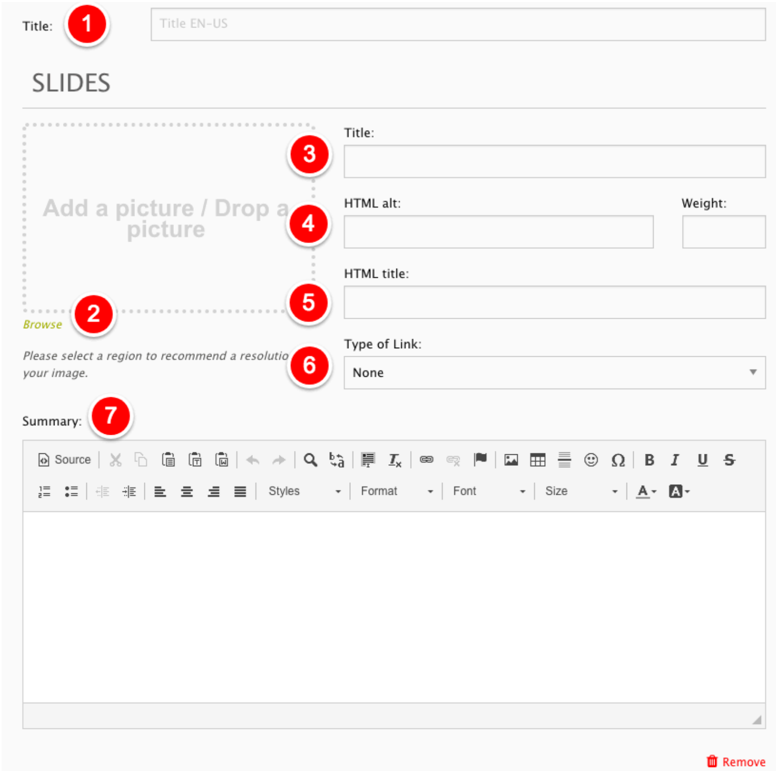


Add one of more slides

Click on the Add Slide button for each image you wish to add to the slider. Set the following parameters for each slide:

1. **Title:** Title for the slide. Leave blank if you do not want one. [Optional]
2. **Add Picture**: Select the image you wish to add. The recommended dimensions will vary depending on your page design, where you are placing the Slider Block, and the number of images you are going to show per slide. Getting the right image and work the way you want it may take some a couple of tries. Take a look at the post titled [Working with Images](#).
3. **HTML Alt:** Provides alternative information for an image if a user for some reason cannot view it. May be blocked by the browser or the end user be visually impaired (using a screen reader). If you are required to comply with an accessibility standard, such as the *Web Content Accessibility Guidelines (WCAG)*, you need to set this attribute. [Optional]
4. **HTML Title:** Displays extra information on the image using a tooltip text when the mouse hovers over the element. [Optional]
5. **Weight**: Relative positioning of the image [Optional]
6. **Type of Link**: Used to make you image clickable to direct the user to another page.
    1. **None**: The image is not clickable
    2. **Image**: Makes the whole image clickable
    3. **Button**: Displays a button on top of the image

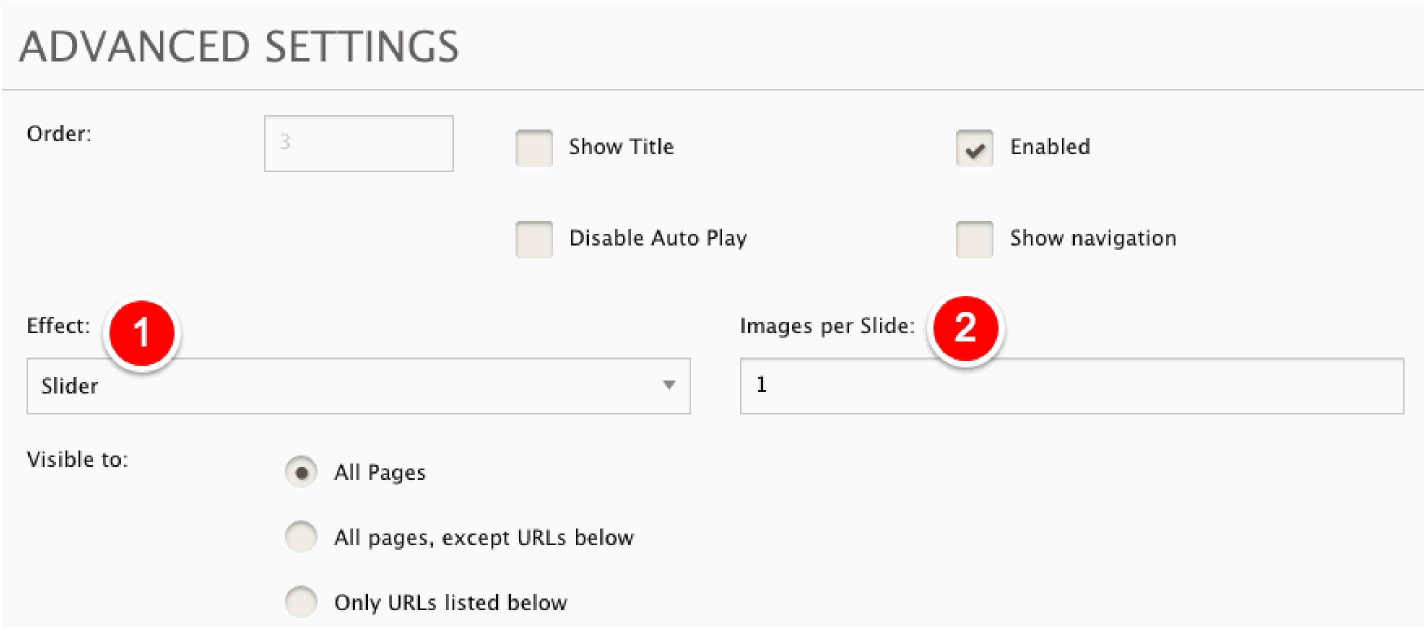
7. **Summary**: Summary to show on the image [Optional]



Advance Settings

In addition to standard Advanced Settings found in all CSM blocks, the Slider Block has two more:

1. **Effect**: The transition from slide to slide can be **Slide** (images come in from right to left) of **Fade** (images fade in and out)
2. **Images per Slide**: The Slider displays one image at a time. You can choose to show more than one image in a slide.


ADVANCED SETTINGS
Order:
3
Show Title
Enabled
Disable Auto Play
Show navigation
Effect:
1
Slider
Images per Slide:
2
1
Visible to:
All Pages
All pages, except URLs below
Only URLs listed below

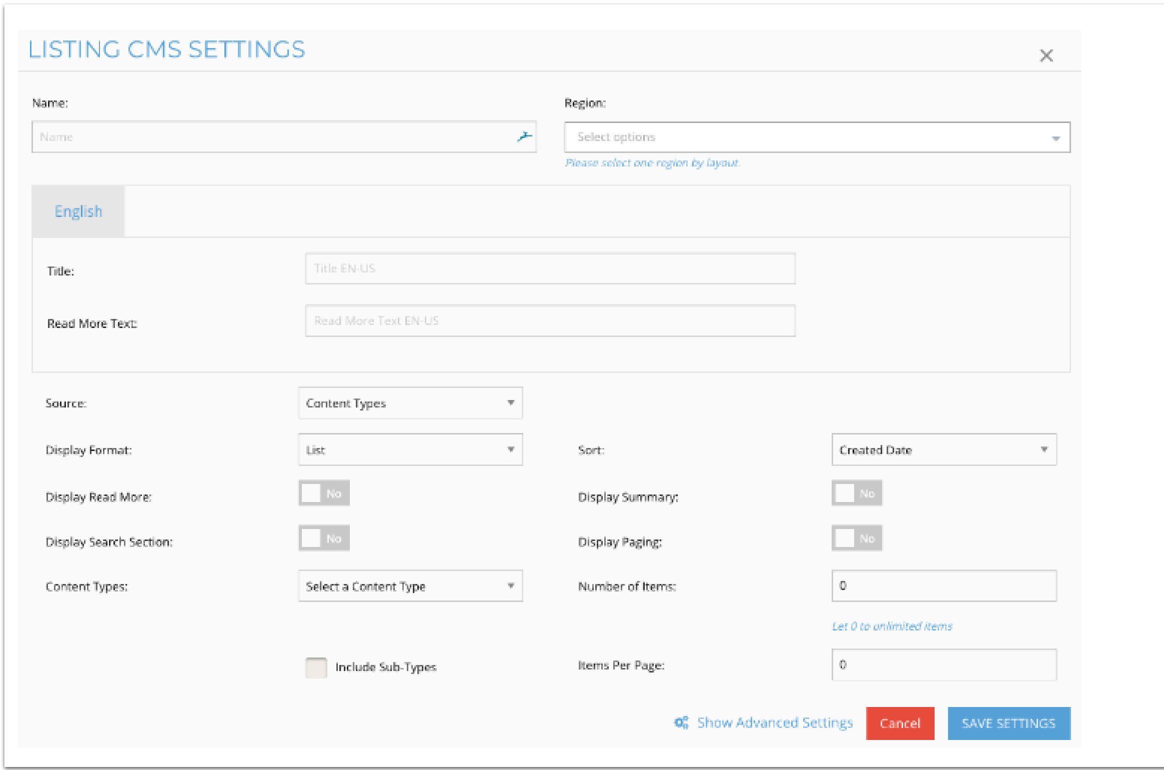
Listing CMS Block (Advanced)

Please note that this is an advanced block. You may be expected to have technical skills and a solid understanding of Salesforce and its features. Advanced blocks are usually not covered in our standard training.

Advanced blocks usually have many uses, which make them challenging to document. We will provide some basics, but expect to spend some time tinkering with them and discovering what is possible.

The Listing CMS Block is not enabled by default. You need to request via our support desk that it be turned on for your instance. Once it is activated it will be available via the CMS under*Blocks > Listing CMS*.

The Listing Block allows you to organize collections of CMS pages (e.g., blogs, news listings) or collection of Salesforce data and display them as a listing, grid, and slider. It provides the tools to build and show these collections, but it is not meant to be a turnkey solution. That is, it requires some work and experimenting, especially because it can be used in many ways.



Since this is an advanced block, we are not going to cover the basics of CMS blocks (e.g., name, regions, title, advanced settings).

The Listing Block can be used in two primary ways:

1. **Content Types:** Organize CMS pages into a collection that can be displayed in a list-like format and searched on.
2. **Salesforce Views:** Organize Salesforce records from a Salesforce View into a collection that can be displayed in a list-like format and searched on.

The following video will give you a good sense of how to use theListing Block (and Featured Opportunities). We recommendseeing the whole video since the beginning covers some basics of the CMS and the Featured Opportunity Block, which is similar to the Listing Block, but if you want to jump to where we cover the Listing Block, it starts at 11 minutes and 20 seconds. (Note that the video does not cover Listing Blocks using Salesforce Views.)

Listing Blocks using Salesforce Views

The basic steps to create aListing Blocks using Salesforce Views are:

1. In Salesforce go to the object that has the data you want to list on your public site and create a view with the columns that contain the information you want to list.
2. Make sure the view Visibility is set to "Visible to all users"
3. Got to your CMS and create a new Listing Block. Under Source select "Salesforce View".
4. Select the Salesforce Object and View.

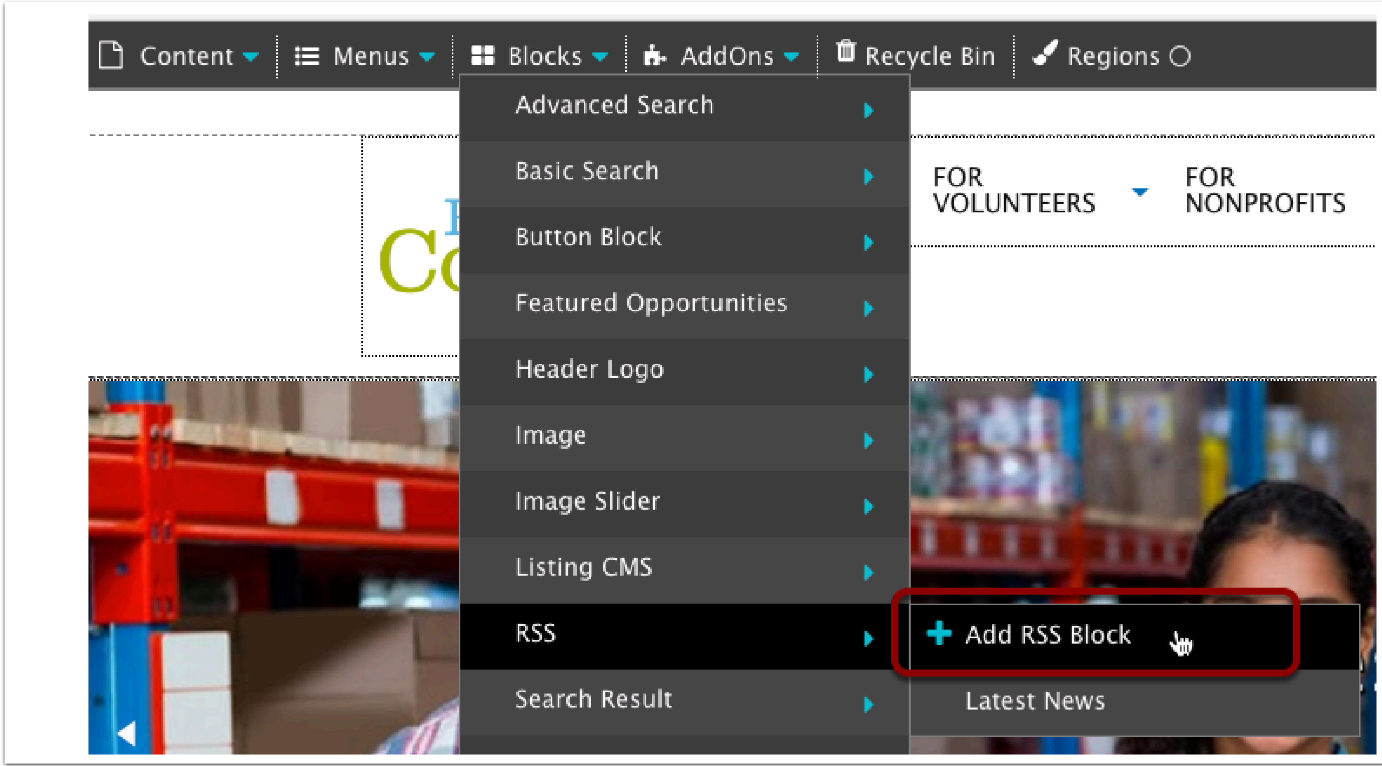
These steps will connect yourListing Block to your Salesforce View. Use the Listing Block settings and page instructions to complete the configuration you want. Remember to tinker!

RSS (Integrating a WordPress blog on your home page)

Blogs are an easier way to quickly publish news items. To make it easy to publish your latest news on the home page, HandsOn Connect offers an integration for blogs on the WordPress platform.

If you don't have a WordPress blog - create one!

In the blocks menu, choose "RSS" and choose "Add RSS Block"



You can also edit a block if you already have one listed (in this case "Latest News" is an existing block which we can choose to edit.

Block Settings

1. Name: The internal name by which you want your block to be called

2. Region: Where do you want the block displayed?

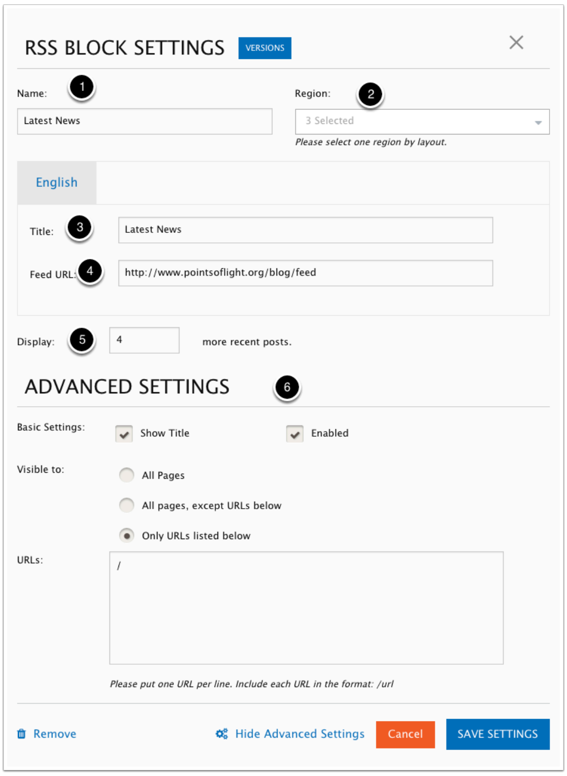
3. Title: The title for block that you can make visible as part of the published block

4. Feed URL: The Word Press Feed Link is the link to the RSS feed you have set up for your blog. It usually looks like this: http://handsonblog.org/feed/   but there are other kinds of feeds that you might enable and link with slightly different URLs.   **Important:** You must add a trailing / after the URL.   (NOTE: if your blog feed ends in wordpress.com then you must use https:// at the start of your URL. having the "s" in the https:// is important because of wordpress security settings.

5. Display: How many items do you want to display on the page. It will display the most recent posts.

6. Advanced Settings ..   as in all blocks, do you want to display the title? Enable the block to make it active, what pages do you want to display the block on.

the URL "/" means 'root' and is the home page of the site.



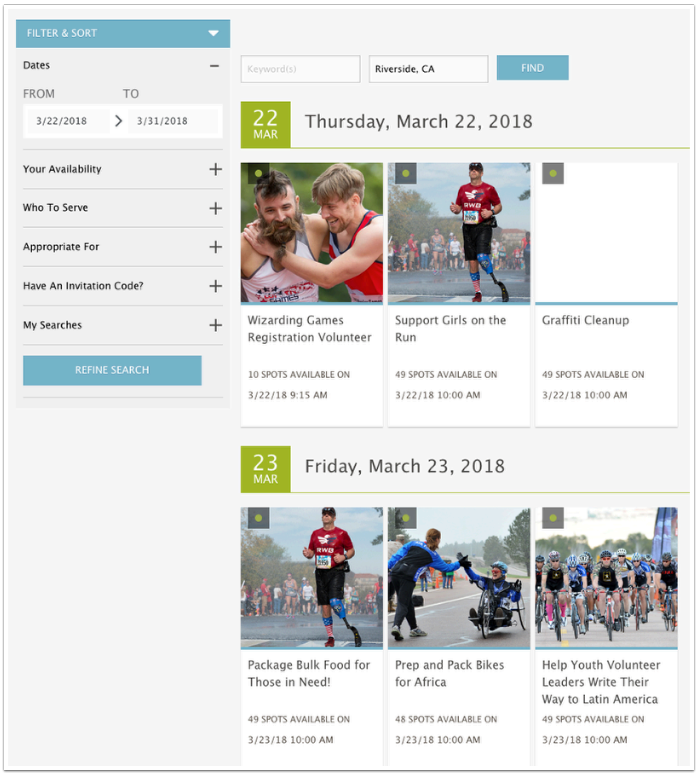
Search Results Block (Advanced)

This is a new block that is available in some HOC templates and custom sites. It combines the visual appeal of the Featured Opportunity Block (including the ability to display images) with the functionality of a search page. It can be configured in either List View or Calendar View and can be used to supplement or replace the standard search listing and calendar pages.

Like the Featured Opportunity block, you can choose what items to display for each opportunity, including the option to include an image.

Like the Search and Calendar Blocks, you can choose which filters to allow a user to apply to the search results.

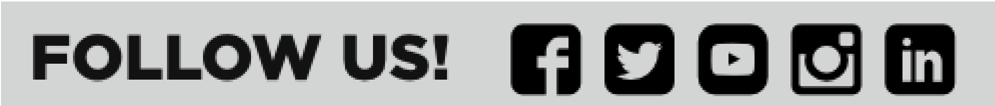
Screen Shot of Search Results block in Calendar Format



For information on adding images to use for this block, see this article:

Social Networks Block

The Social Network Block is one of the simplest to use. It facilitates adding icons linked to social media accounts to your HOC public site:

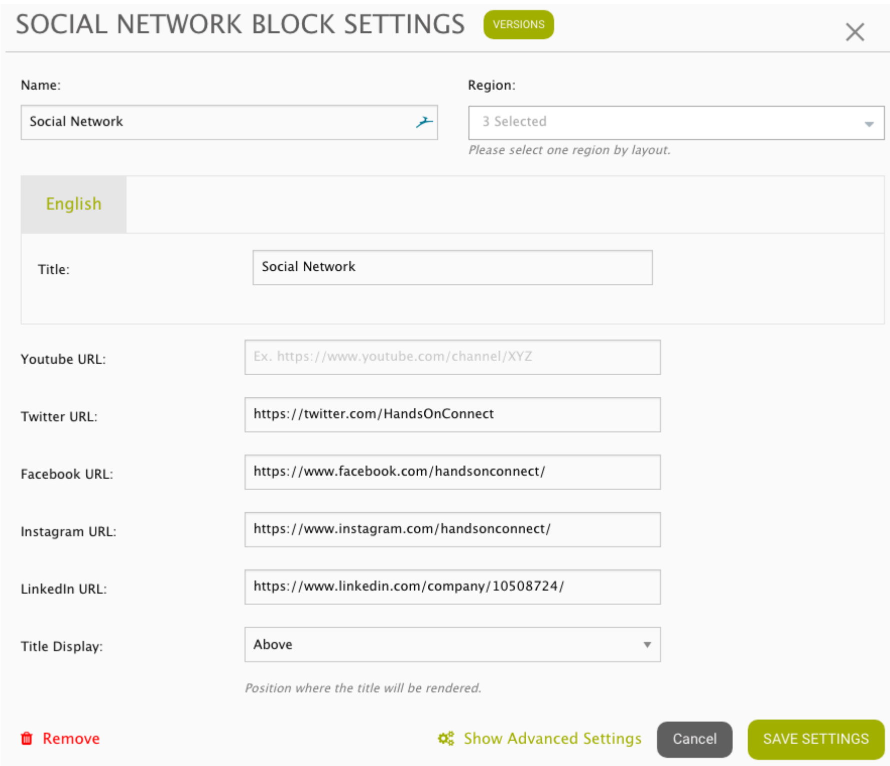


All you need to do is add your social media URLs for the social media accounts you use, such as:

- YouTube
- Twitter
- Facebook
- Instagram
- LinkedIn

To use the Social Media Block use the form below. Here are some of the parameters you can set:

1. **Name**: The internal name by which you want your block to be called
2. **Region**: Where do you want the block displayed?
3. **Title**: The title of the block that you can make visible as part of the published block
4. **URLs**:   URLs of each of your social media pages.
5. **Advanced Settings**: as in all blocks, do you want to display the title? Enable the block to make it active, what pages do you want to display the block on.



Alternative Method: Using the HTML Block

If you are comfortable with HTML and inline CSS, you can also use an HTML Block to add your Social Media icons and links. This will give you more flexibility and customizability.

Sponsors

Content Coming Soon!

System Forms (Overview)

The menu item "System Forms" in the block menu, gives you access to edit four system-managed forms / configurations.

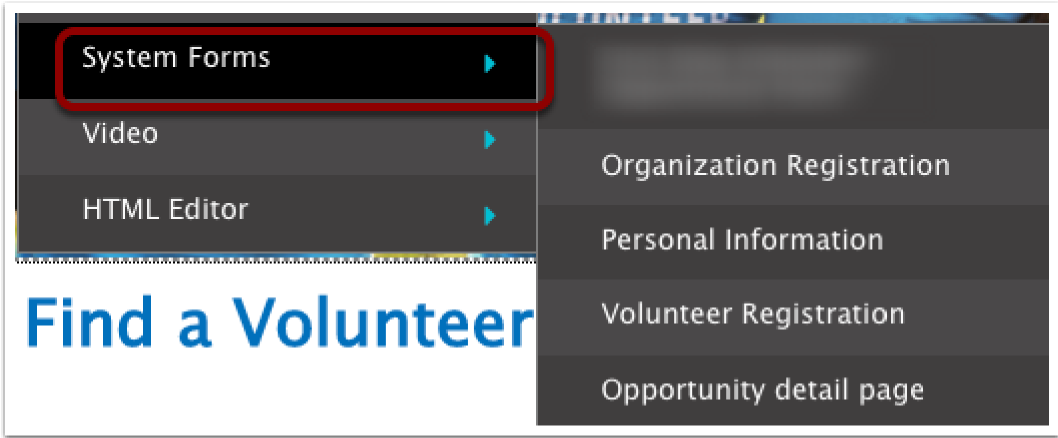
The details of each of the system form blocks is found in the chapter System Forms:

Organization Registration - the page Organizations use when they sign up to become partner organizations.

Personal Information - The page volunteers and partners use when they wish to update the information they submitted during volunteer regisration.

Volunteer Registration - The page volunteers use when they create an account on your public site.

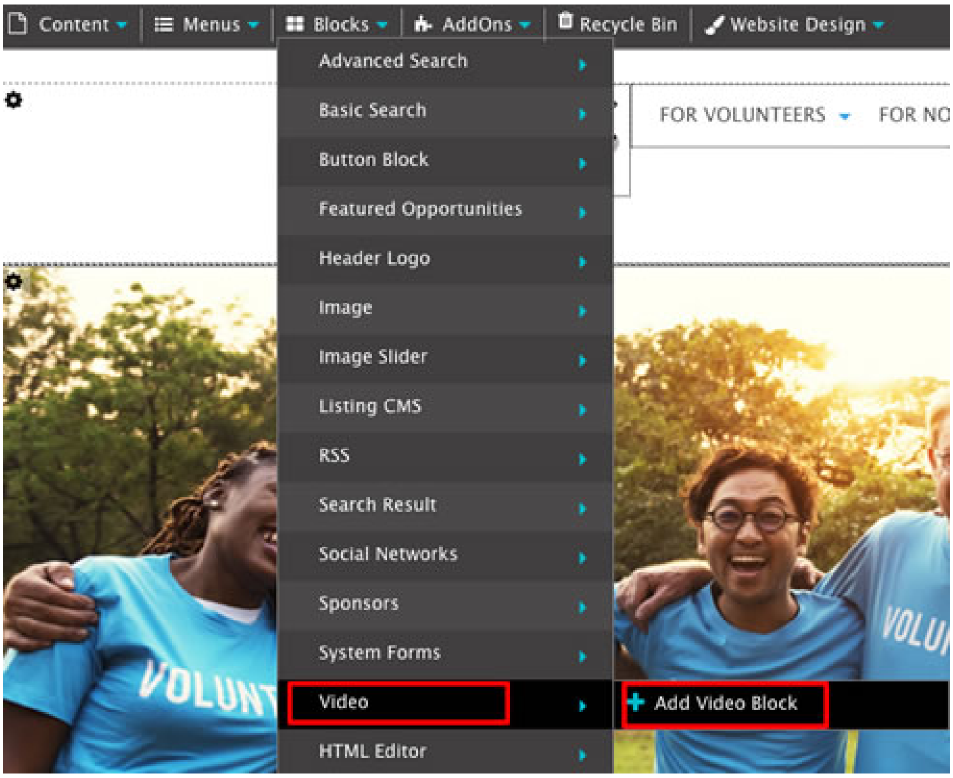
Opportunity Detail Page - Allows you to customize the way links and buttons appear on the opportunity detail pages.



Video Block

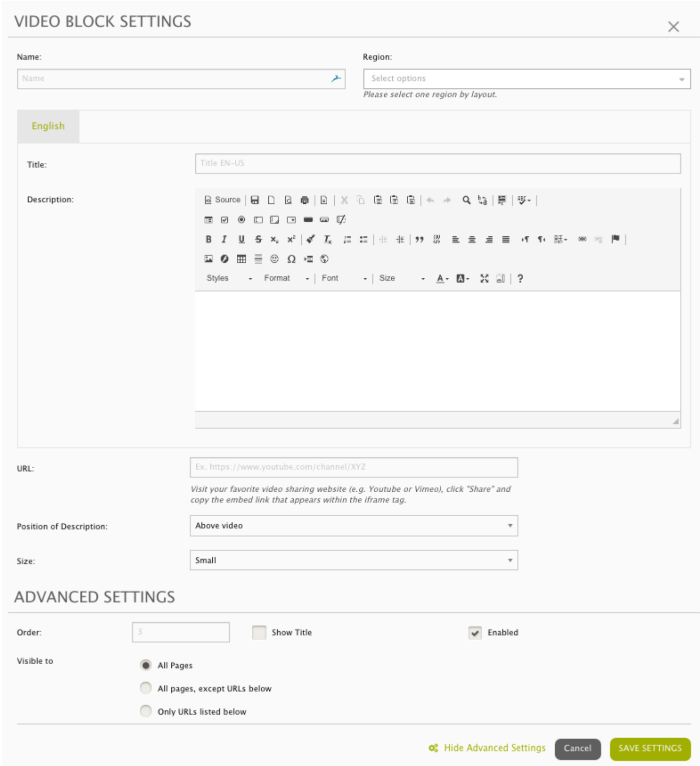
A video block allows you to easily embed a video in a CMS page from a video service such as YouTube or Vimeo.

Select Video Block from the Block Menu in the CMS utility bar and create a new video block (note that your available CMS blocks vary depending on the version of HOC that you are using).



Define the parameters for your video.

1. Name your video block. We recommend being descriptive, e.g., "Home Page - Intro Video".
2. Select the CMS region where you want your video to appear.
3. Give your video a Title (optional)
4. Enter the URL of where your video is hosted. For example, if it is hosted on YouTube, to youtube.com and find the video you want to add to your page. Click on the "Share" link and copy the URL it provided, which usually looks something like this: https://youtu.be/dmfahS0Zi0Y. Paste this URL in the URL field of the video block.
5. Add a description (optional)
6. Select where the description will be displayed in relation to the video (optional)
7. Select the size of the video. This is how much screen space it will use.
8. Use the advanced settings to specify which page(s) you want the video to appear on, and in what order relative to other blocks or content on the page.
9. Save the Settings of your video.
10. You are done!



Alternative Method: Embed a video using the HTML Block

Many video services such as YouTube and Vimeo provide an "embed" code which you can use to embed a video in a CMS HTML block. This allows you to add video using the HTML block instead of the Video block, though it may require that you have some basic HTML skills.

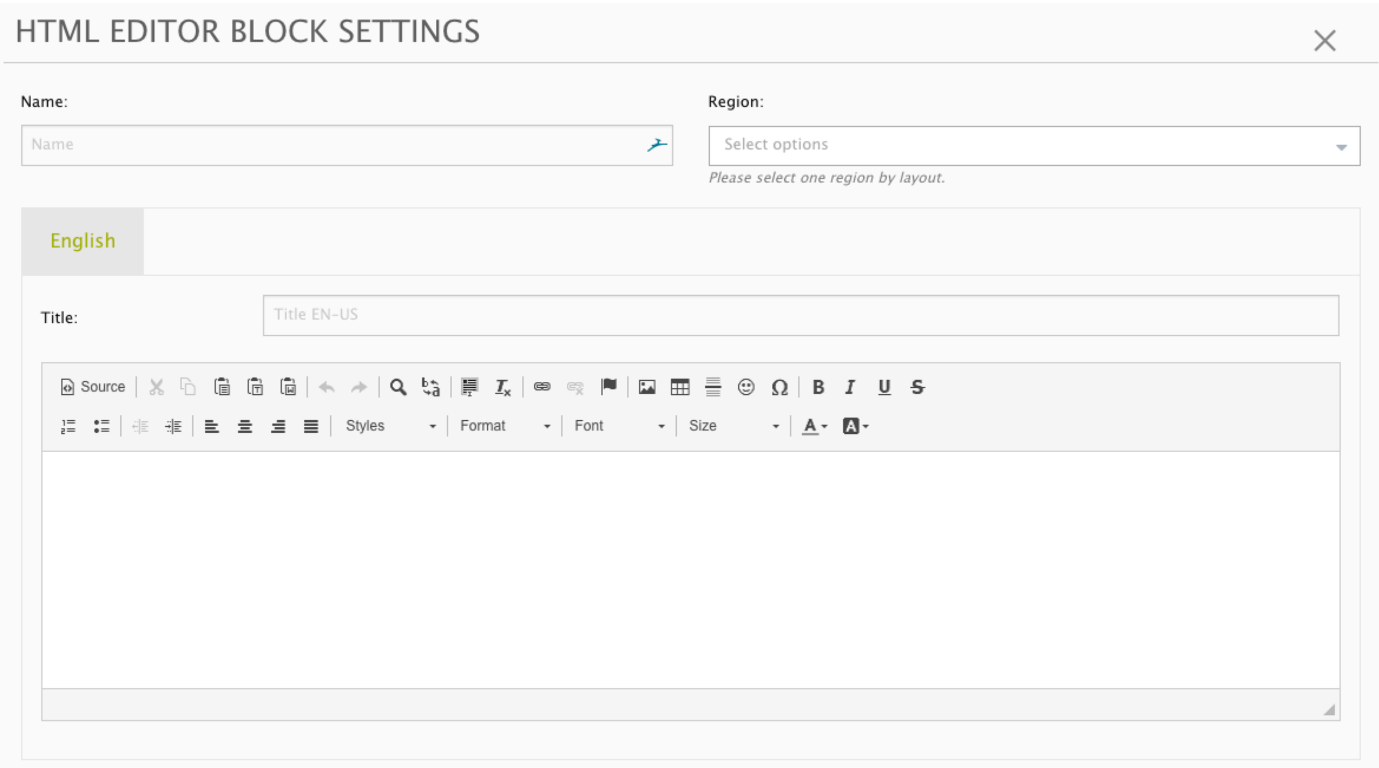
HTML Editor Block

The HTML Block is the workhorse of the CMS, and it is probably the one you will use the most. It is also the most flexible since it allows you to display and mix different content (e.g., text, tables, images, embedded videos).

The HTML Block uses the same HTML editor you find when creating or editing a CMS page.

Create or edit your HTML content

To create or edit an HTML Block got to the CMS utility bar and click on *Blocks* -> *HTML Editor*. It will open a dialog like this:



Define the parameters for your block

1. Name your Search Results block. We recommend being descriptive.
2. Select the CMS region where you want your content to appear.
3. Give your block a Title (optional)
4. Enter your main content in the HTML editor and format using the different options, using the icon buttons on the top of the rich text area, such as:
   - **Source:** Provides source code editing in the source editing area that replaces the WYSIWYG view within the editor interface. [Please read our friendly warning below about using the Source](#).
   - **Cut & Paste buttons:** includes paste from Word, which we strongly recommend using if you are indeed pasting from Microsoft Word.
   - **Undo or redo buttons**

- **Find**
- **Replace**
- **Select All**
- **Remove Format:** clear all formatting. Useful the formatting has gotten wonky, and you want to start again without deleting the text itself.
- **Hyperlinks:** Can be used on text and images.
  - **Link:** create a text that links to another page.
  - **Unlink:** remove a link.

- **Anchor:** links within the same HTML editor content.
- **Image:** insert an image using the image gallery.
- **Table:** add a table and set basic table properties, such as:
  - Number of rows and columns.
  - Table width and height.
  - Cell padding and spacing.
  - Table headers setting.
  - Table border size.
  - Table alignment on the page.
  - Table caption and summary.

- **Horizontal line**
- **Smiley**
- **Font styles**...
  - Bold
  - Italics
  - Underline
  - Strikethrough

- **Lists**...
  - Numbered list
  - Bulleted list

- **Increase Indent**
- **Decrease Indent**
- **Text alignment**...
  - Left
  - Right
  - Center
  - Justified

- **Styles:** drop-down of selected styles. Use sparingly.
- **Paragraph formats:** drop-down of normal text and headers. We strongly encourage that you use these instead of trying to custom format your content. It will give your site consistency and make it more compatible across browsers, and perform better in search engine optimization.
- **Font:** use sparingly. We recommend using the **Paragraph formats** instead.
- **Font size:** use sparingly. We recommend using the **Paragraph formats** instead.
- **Font color:** use sparingly. We recommend using the **Paragraph formats** instead.

- **Background color:** use sparingly. We recommend using the **Paragraph formats** instead

5. Use the advanced settings to specify which page(s) you want the block to appear on, and in what order relative to other blocks or content on the page.

Our two cents…

You can see above that you have myriad of options to format your content. Having said this, your website is designed with default styles that are meant to give it consistency and your users a better experience, as well as make the page more compatible with different browsers and devices. We discourage from getting creative with all the options above and instead let the sitewide styles do their job.

The formatting options from the list above you use should be limited, to the extent possible, to:

- Font Styles (not Styles)
- Lists
- Text Alignment
- Paragraph Formats

The HTML Editor is not a Word Document

Remember that the HTML Editor is not a Microsoft Word document. If anything, it is a very primitive, extremely limited, and somewhat clunky version of it. If you have worked with any CMS (e.g., Wordpress, Drupal) you probably know this already.

The magic you can do in Word is probably not possible with HTML Editor unless you have some mad web page development skills.

Please be careful with using the HTML Editor

The HTML Editor when used in **Source** mode it allows you add custom HTML, as well as CSS and even more advanced web page elements.

Note that we only support the HTML Editor when used in non-Source mode. Any changes you make or code you add via the Source feature is at your risk. It is possible to break the CMS or your page/site if you add improper, malicious or poorly formatted code. If our team needs to fix it, we may charge for the work.

When using the **Source** feature we expect you to have a solid understanding of HTML, CSS, Javascript and any other technology you are using.

We explicitly prohibit inserting dangerous or malicious code.

Remember that with great power comes great responsibility! If your spidey senses are saying that you do not really understand that code you are adding or its impact, please do not add it.

Featured Opportunity Block

Using the Featured Opportunity Block

The Featured Opportunity Block is an advanced block that is still under development. It's available by request as a pilot for those who want to experiment with its use. Not all functionality in the block may be available in all public site templates, and the rendering of certain configurations may or may not be suitable for your template yet. We will continue to improve the ease of use and visual rendering of the block throughout its pilot.

The purpose of the Featured Opportunity Block is to provide an attractive way of showing selected volunteer opportunities that you want to feature. The feature could be put on the home page - or on any pages in the CMS. You can create multiple featured opportunity blocks to feature different collections of opportunities. This potentially makes it possible to display 'custom searches' of opportunities each in its own block. The possible uses are endless!

How to use Featured Opportunity Block (video)

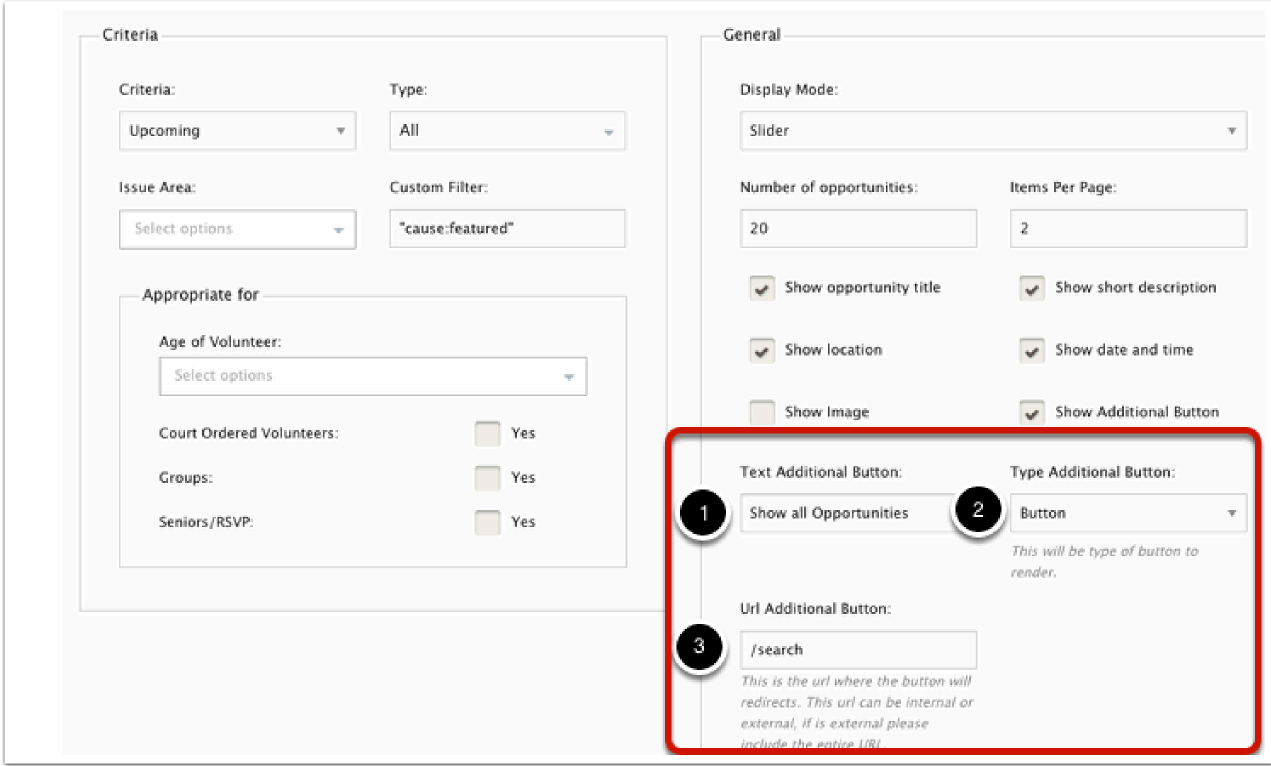
This video, part of the HandsOn Connect University series - demonstrates the Featured Opportunity Block and shows its basic workings. (The video also discusses the Listing Block, which is a separate block. But you can get all the info on how to use and configure the Featured Opportunity Block from a 10 minute segment in the video).

Start viewing this video at the 1 minute mark 1:00. The Info on how to use the Featured Opportunity Block starts at 1:00 and ends at 11:27. (Total viewing time = 10:27)

Add a button to your featured opportunity block

Clicking on the "Show Additional Button" checkbox in the General Settings for the block will reveal additional settings:

1. What text do you want your button to show?
2. Do you want to display as a Button or a simple Link?
3. What URL do you want the button to take the user to when pushed?



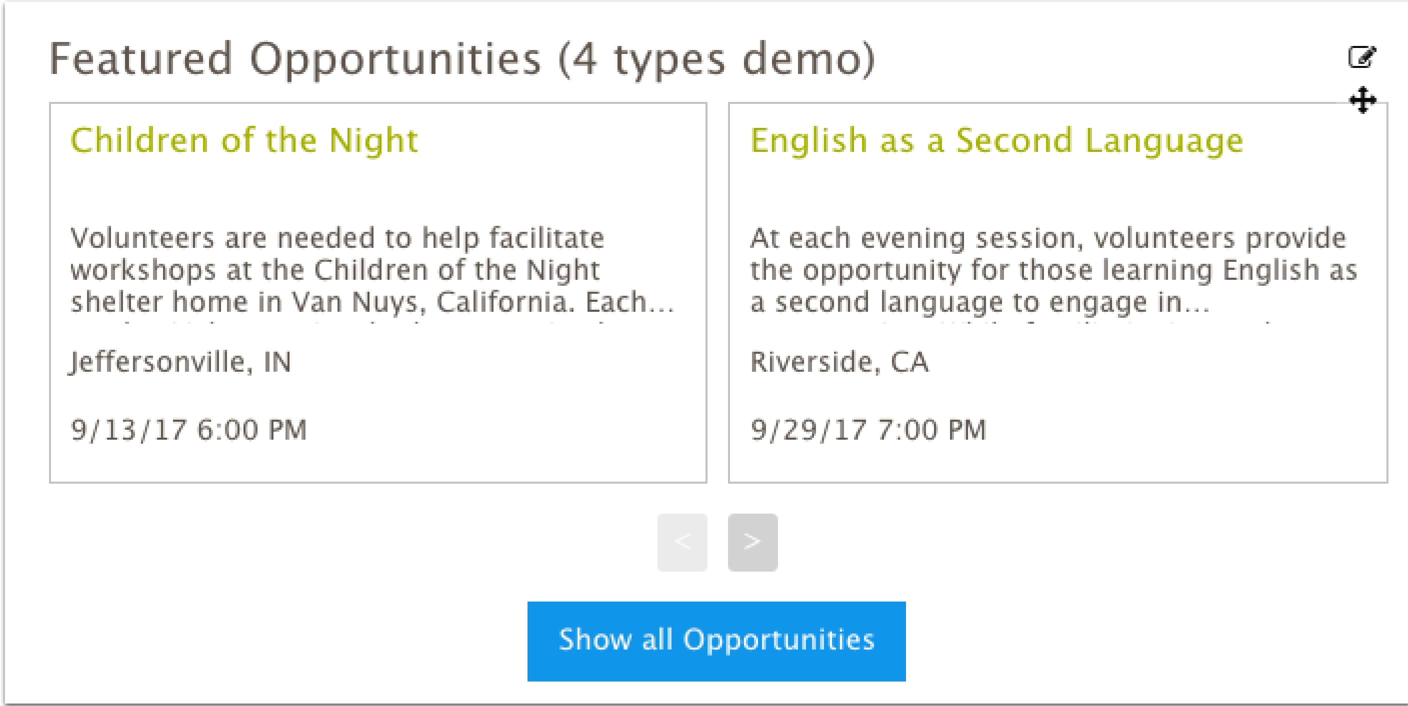
Here's how this Featured Opportunity Configuration would be displayed

We are using a custom filter to select the opportunities.

We've set it to slider mode, and said to show up to 20 opportunities, 2 at a time.

We're displaying title, short description, location, date and time, and have added a button to take us to the search page where they can see ALL opportunities.

Here's how this block will appear.

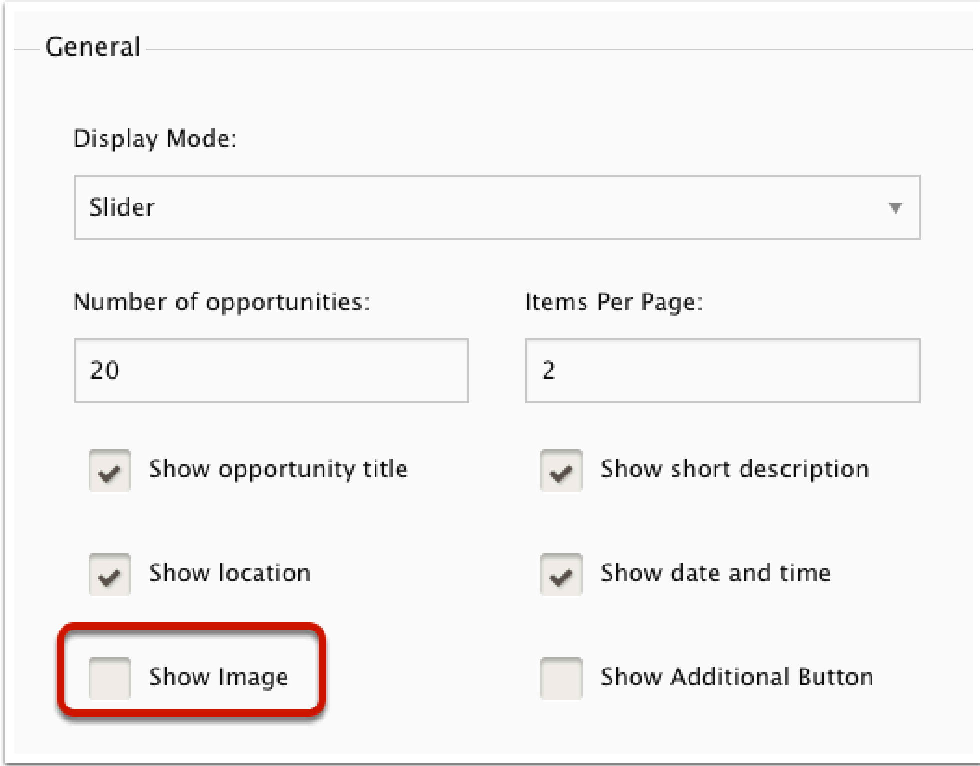


Images for the Featured Opportunity Block

At the current time we do not recommend using the 'add images' option in the featured opportunity block. This feature is still under development and may or may not produce satisfactory results in your template.

If however you want to try using images - see THIS ARTICLE on how to upload images to use in the featured opportunity block.

We plan to improve the ability to manage images and use them in the featured opportunity block in the near future. But feel free to enable images and see how they work in your template. If they do not appear satisfactorily for you - please open a support ticket and give us the details so we can work to improve the image functionality in your instance of HandsOn Connect.


General
Display Mode:
Slider
Number of opportunities:
Items Per Page:
20
2
Show opportunity title
Show short description
Show location
Show date and time
Show Image
Show Additional Button

Tagging opportunities to use in the Featured Opportunity Block

The Featured Opportunity Block is a power user feature for in the HOC3 CMS. If the block is not available in your instance, open a help center ticket and request that it be added to your CMS.

This article will show you how to 'tag' individual volunteer opportunities to appear in the Featured Opportunity Block.

One Time Setup for tagging opportunities

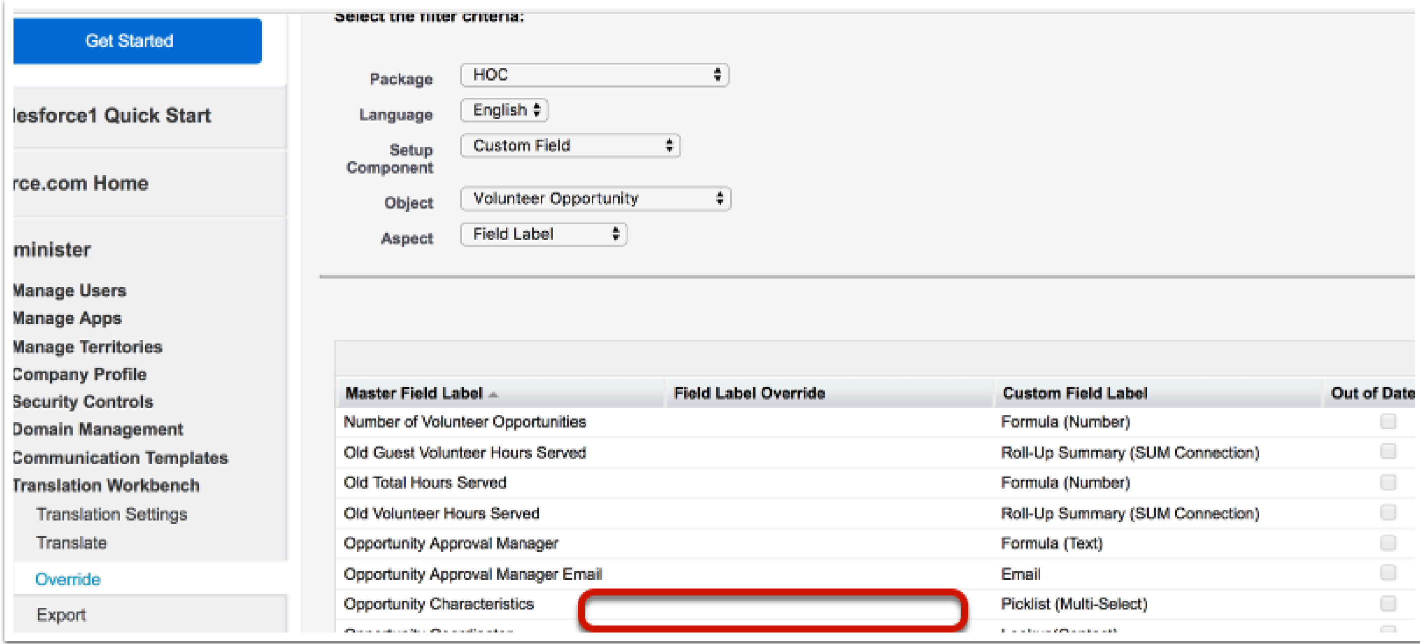
1. **Add the field "Opportunity Characteristics" to the Volunteer Opportunity Page Layout.**

In the Volunteer Opportunity page, if you do not see the picklist "Opportunity Characteristics," go to the Page Layout and add it.

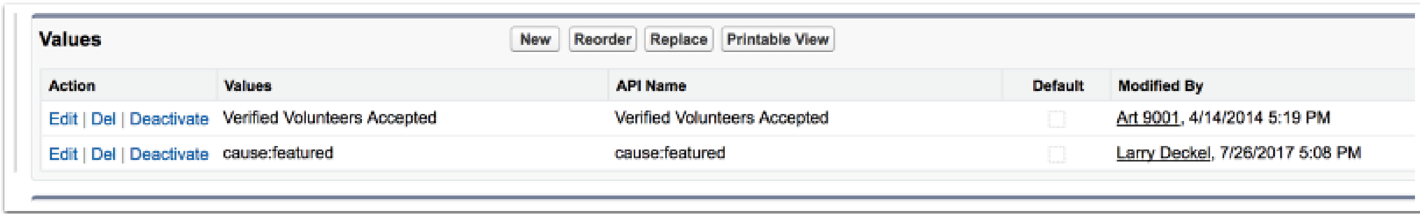
Note: When this field appears on the page layout - the field label name may appear as "POL Integration Partner". If so - you can fix this by going to setup / translation workbench / override / and enter the filter criteria shown below.

If a value shows up with a field label override for "Opportunity Characteristics" - just delete the override. The field will then be labeled "Opportunity Characteristics" as expected.

Note: The fields "Impact Area (Local)" and "Program Area (Local)" can also be used to tag opportunities. So you have three options for tagging!



2. Go to the Volunteer Opportunity Fields, and add a new picklist value for the field "Opportunity Characteristics".



There is another value in this multi-picklist -- "Verified Volunteer Accepted" . After you add your cause:featured picklist value - you can delete "verified volunteers accepted" as its no longer being used by the system.

If desired, you can create different tags so that you can quickly change which opportunities are featured based on how they are tagged. Example:

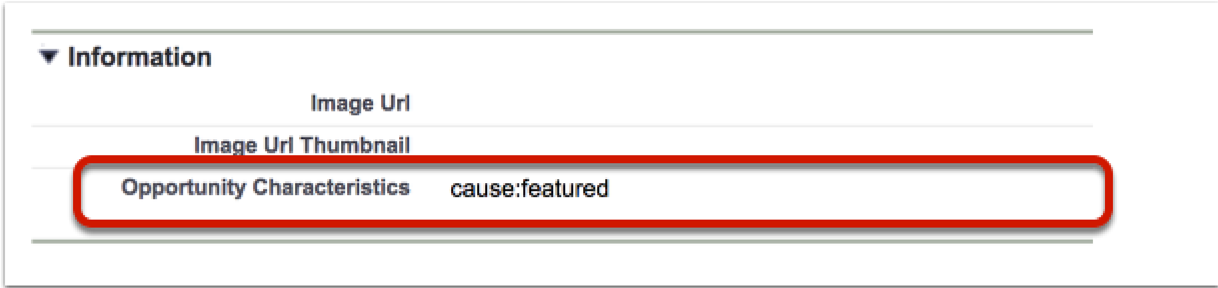
cause:featured
cause:holiday
cause:highneed

Note: In this field, as well as program area (local) and impact area (local) its best to choose unique words for your tags. Why? Because if you just put the word 'featured' as a tag -- then when searching on that tag - any volunteer opportunity that had the word 'featured' in it would be found. By using a unique tag like cause:featured -- you will limit search results to ONLY bring up the opportunities that use your tag!

Designate the Volunteer Opportunities you want to feature:

Go to the volunteer opportunities you wish to 'feature' in the block and add the picklist value of each to your tag cause:featured

(This is a multi-picklist = so more than one tag can be added to an opportunity. If Verified Volunteers Accepted is a current value - do not change it. This is handled via automations in the verified volunteers add-on.)

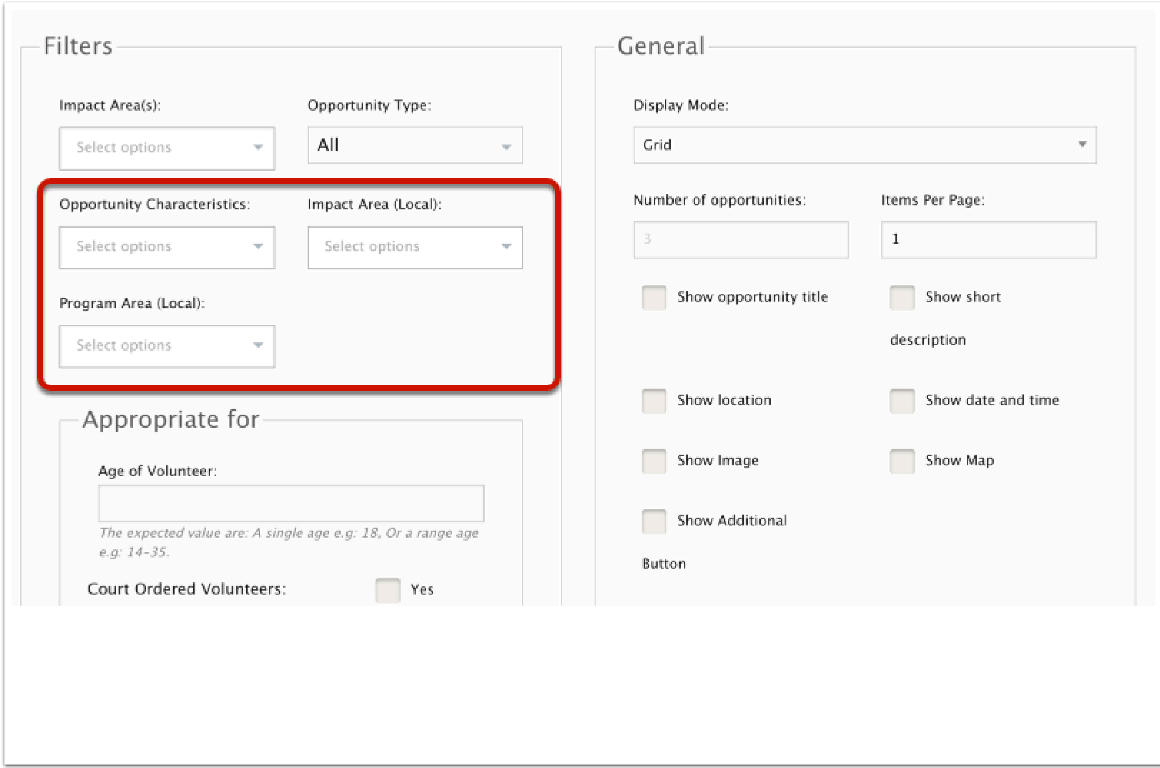


Configure the Featured Opportunity Block to feature your 'tagged' opportunities.

The featured opportunity block can use a number of different criteria to determine which opportunities to display. For example:

- Most recently posted
- Upcoming
- Nearest
- Issue Area
- Type of Opportunity
- Appropriate for

But in this case we want to display the opportunities we've 'tagged'   (which may not match any other criteria). To do this we select the tag we want to feature using the "Opportunity Characteristics" picklist values in the block. (You could also do this with impact area (local) or Program area (local).



Note: The Tags you create using Impact Area (Local) and/or Program Area (Local) also are searchable through keyword search in search pages. Use your keywords to find selectively tagged opportunities, and then SAVE the search results to a saved URL, which you can then use to create links or navigation items that return only your 'tagged' volunteer opportunities.

How to upload Images for use in the Featured Opportunity Block and Search Results Block

Using images in the Featured Opportunity and Search results Blocks is still a BETA feature in HandsOn Connect.   You can use images - but they aren't particularly easy at the current time to upload so that you can enable images for this block.

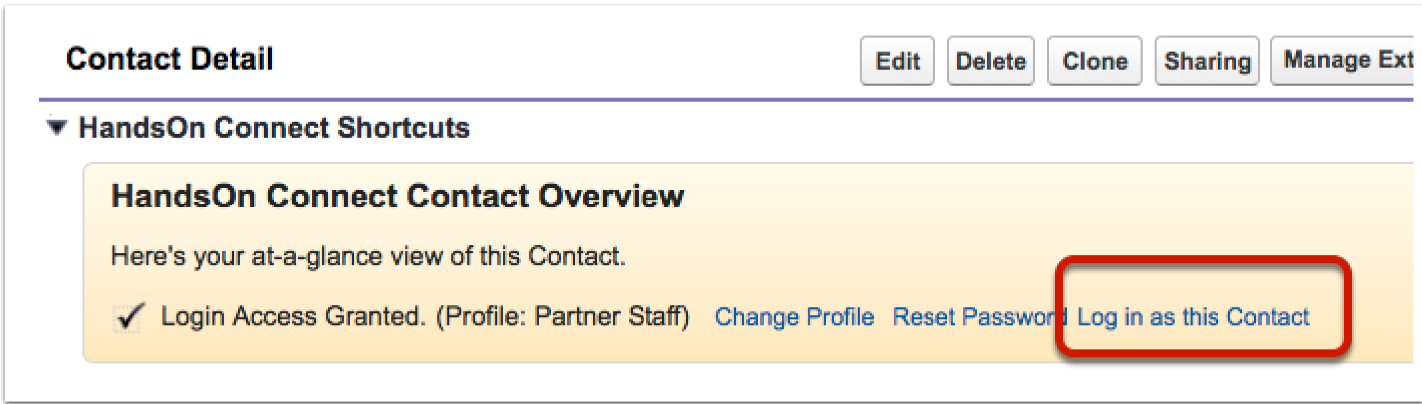
There are currently two ways to set the image that appears in the featured opportunity block:

METHOD 1: Upload the image via the sharing portal

Images that are uploaded through the sharing portal, are automatically associated with the volunteer opportunity.

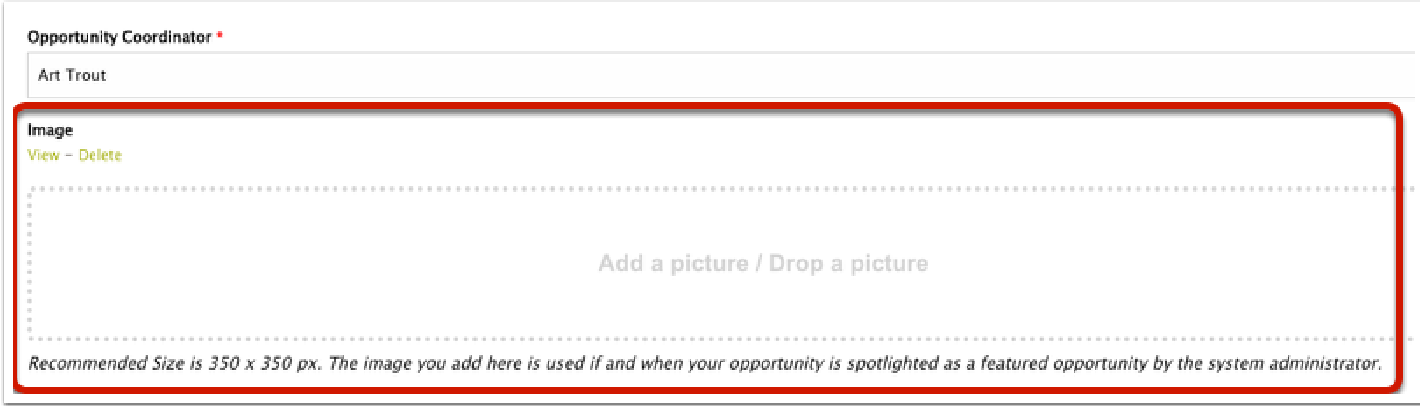
To do this: Login as a contact for the organization that is managing the Volunteer Opportunity.

In the example below, I want to add images to volunteer opportunities that are managed by Troutco. So I "Log in as this contact" for a contact for Troutco that has partner staff profile granted:



Go to the volunteer opportunity(s) that you wish to add an image to, and click on Edit:

Upload the image through the "Image" field in the opportunity detail. The recommended size of the image is 350 x 350.   A square image is best to use to avoid distortion.   (The image can be larger than 350 x 350, but the larger it is, the longer it may take to load)



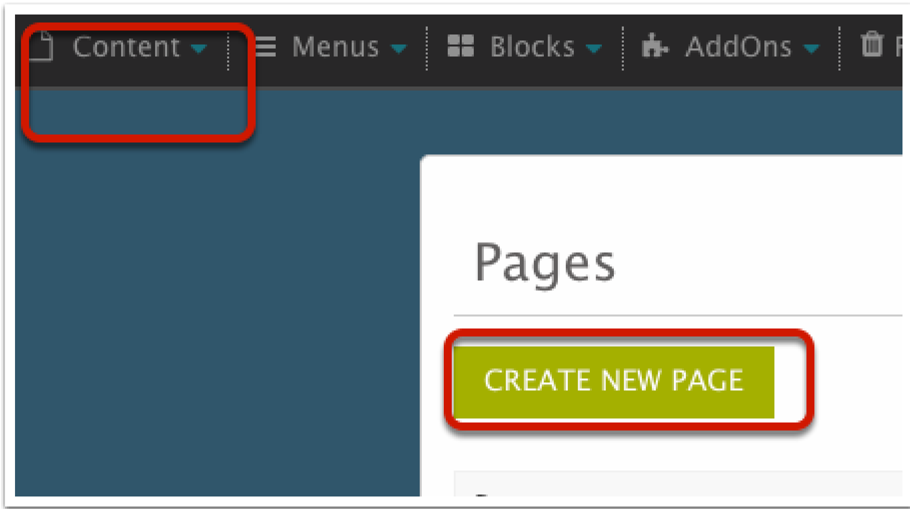
Doing this will automatically populate the custom field(s) in the Volunteer Opportunity Object - "Image URL Thumbnail" (as well as the hidden field "Image URL" which may be used in upcoming features.

Image Url Thumbnail	https://hocps.blob.core.windows.net/9001/opportunities/ESL686x686_thumb.jpg
Image Url	https://hocps.blob.core.windows.net/9001/opportunities/ESL686x686.jpg

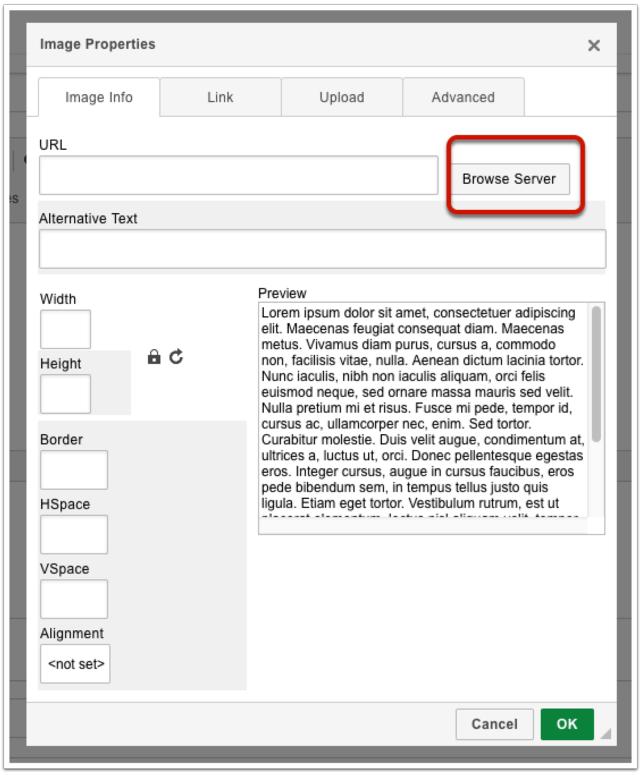
This is the best way to add images -- as the URLs are automatically populated for you.

Method 2: Upload images in the CMS and manually populate the URL

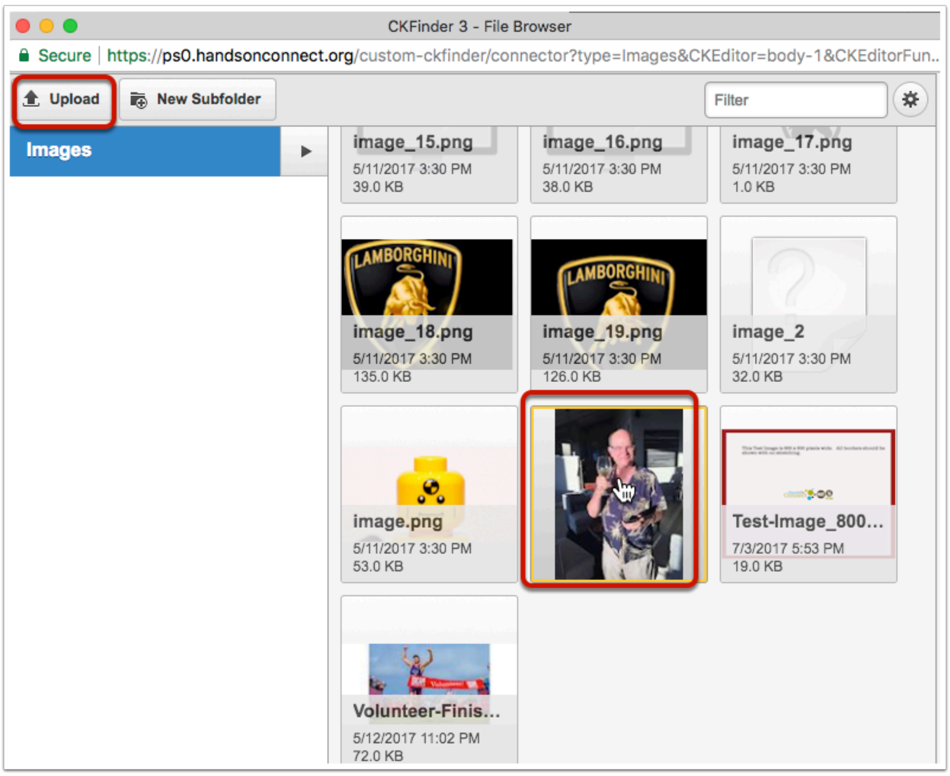
1. Go to your CMS and go to the menu Content / Pages and click the + sign to create a new page.



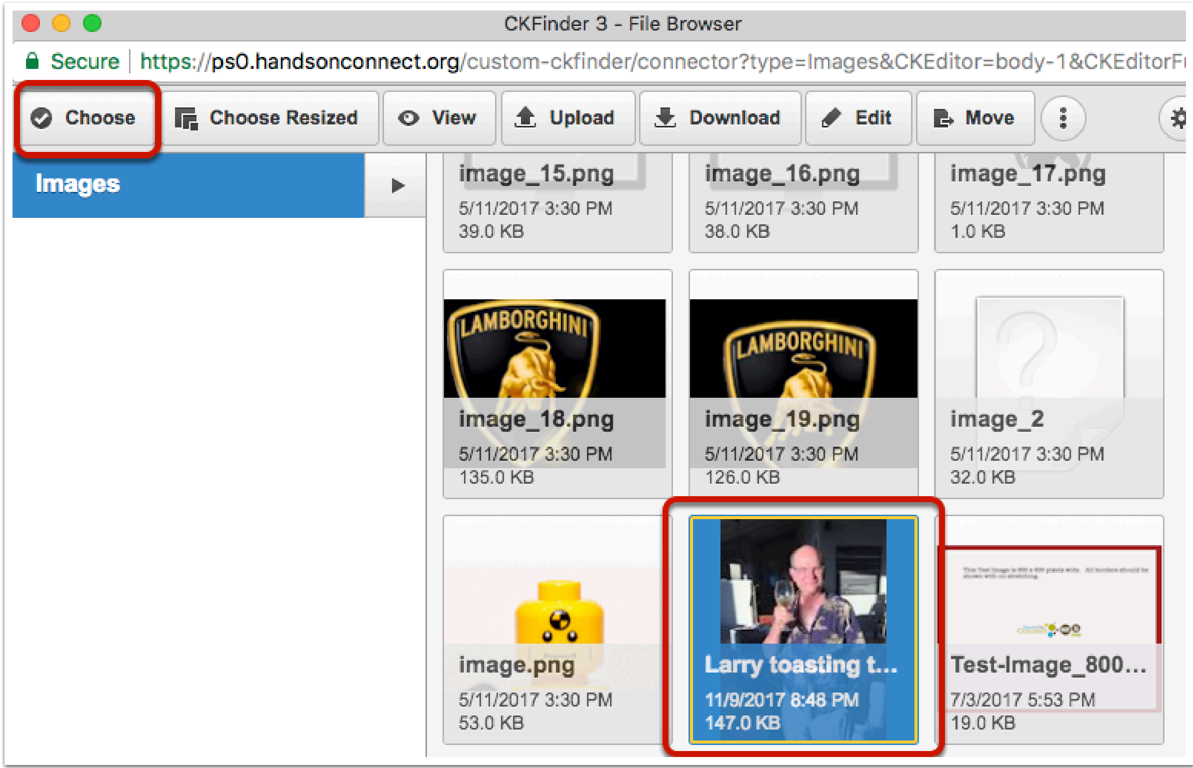
2. In the WYSIWYG editor, click on the insert Image icon to open up the Image Properties window, and click on the Browse Server button.



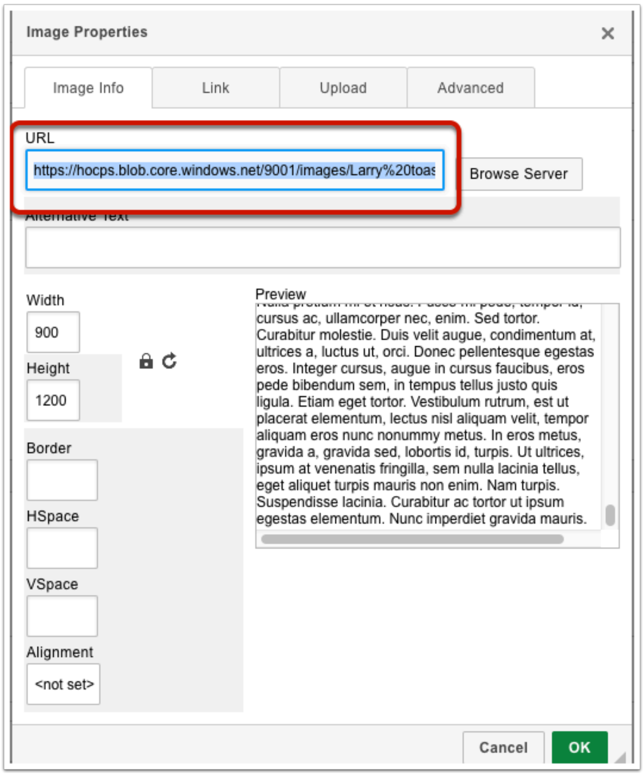
3. From here you can upload a new image, or select an image that is already uploaded. (If you upload an image, first upload it, and then click on it in the list of images available: For images to be used in the featured opportunity block, they should be square, and with a recommended size of 350 x 350. (They can be larger, but not too much larger or they will take too long to load).



4. Then click on the CHOOSE button



5. Copy the URL that will now be shown in the Image Properties box.



6. While you're here. Upload as many images as you may want to make available to different volunteer opportunties, and keep track of the URLs for the various volunteer opportunities you want to add images to.

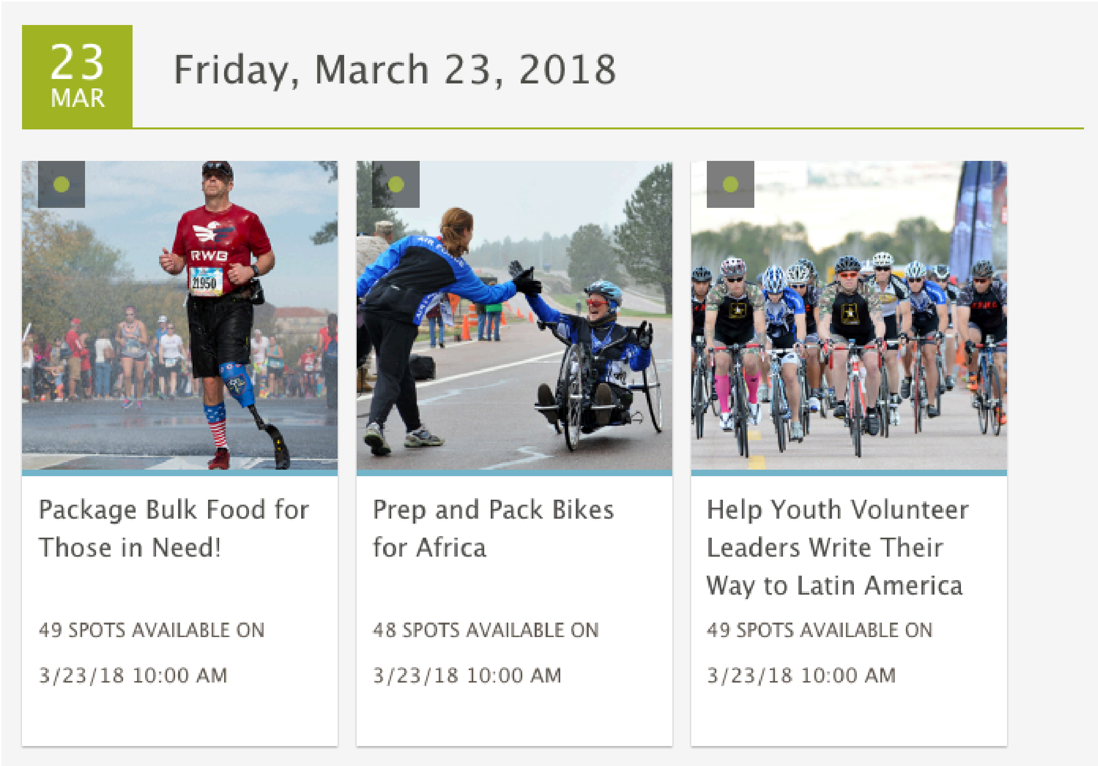
There is no need to save the new page that we're using strictly for the purposes of uploading images. So you can cancel out of this 'new page' once you have captured the URL(s) for images you want to use.

Go to the volunteer opportunity you wish to use one of your uploaded images for, and paste the URL into the Volunteer Opportunity field "Thumbnail Image URL"

Given that it can be time consuming to set images for each and every volunteer opportunity, you may also want to set default images to automatically be populated, so that every opportunity in your block has an image. [See this article on how to set default images for Featured Opportunity and Search Results Blocks]

Featured Opportunity and Search Results Blocks - Set default images

The CMS Featured Opportunity Blocks and the new Search (and Calendar) Result Block support displaying thumbnail-like images when shown on your public site. Below is an example of the new calendar with images.



You can set images for individual volunteer opportunities. This can, of course, requires some work, because if you activate displaying the images, you want to make sure that all your projects have images.

One workaround is to set up a Process Builder in Salesforce that will add a default image to a volunteer opportunity when it is saved if an image is not assigned to it already.

These are the steps to create the Process Builder. If you are not familiar with the Process Builder, review the following Salesforce Trailhead:

https://trailhead.salesforce.com/en/projects/quickstart-process-builder

You need to have a good understanding of Salesforce admin concepts and have access to the Setup in Salesforce.

Let's start!

1) Go to the Process Builder (Setup > Create > Workflow & Approvals > Process Builder)

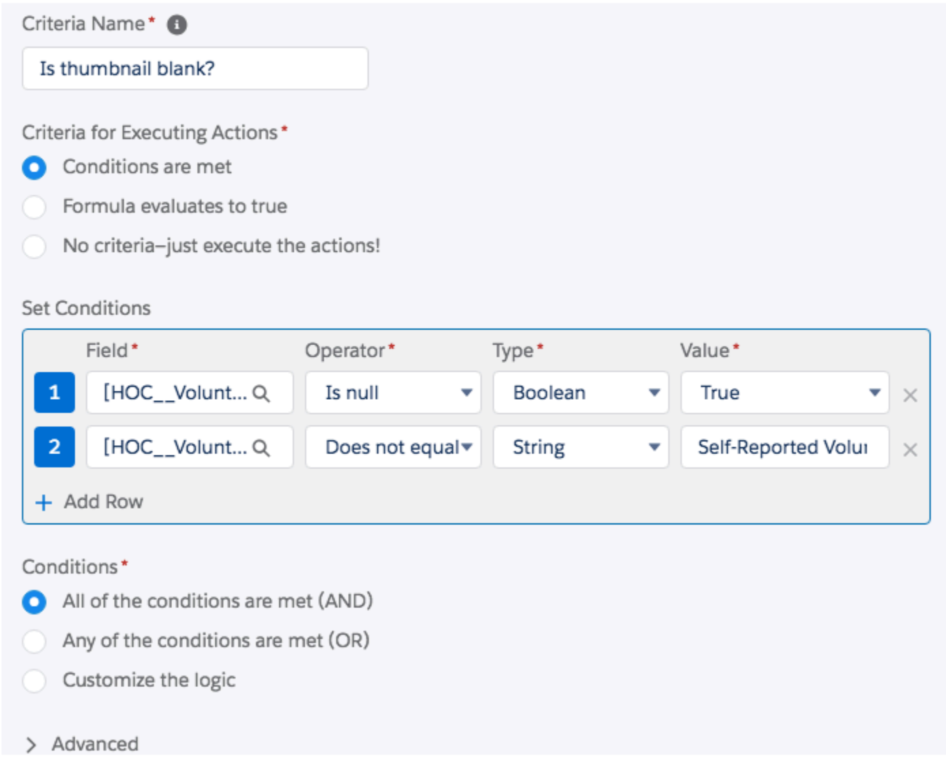
2) Click on the "New" button to create a new Process

3) Give it the name "HOC Default Thumbnail Image for a VO Back" and description "Assigns a default image to a VO if none is assigned"

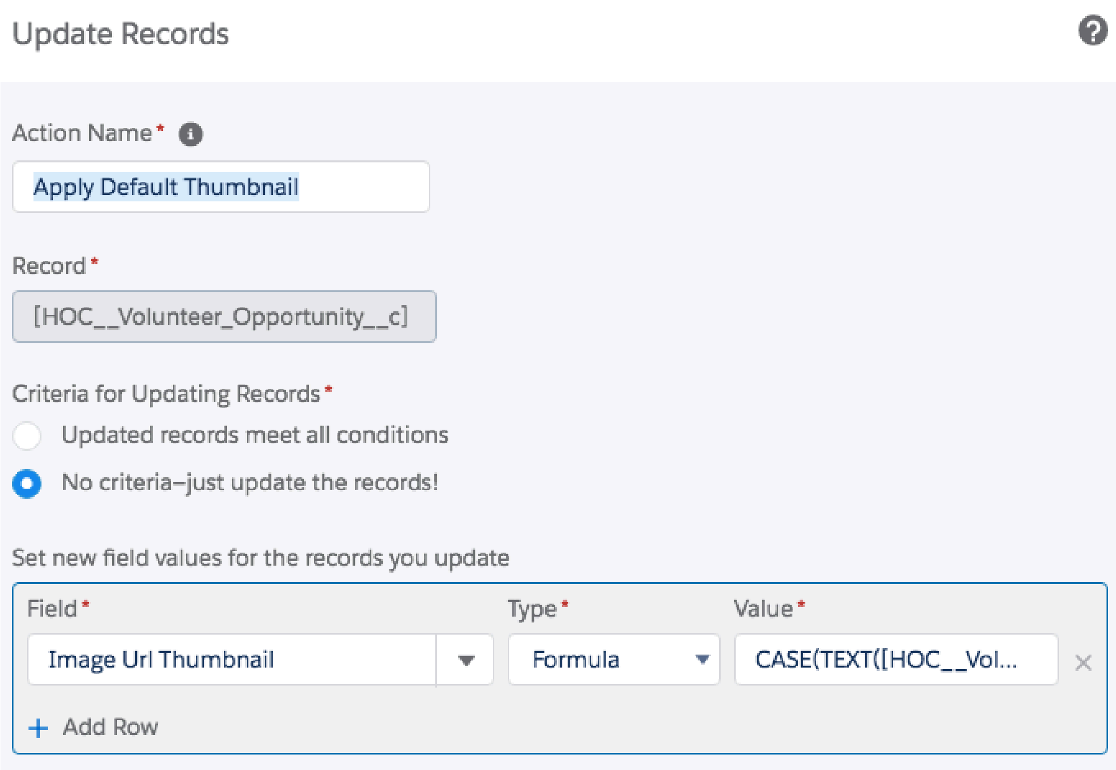
4) Choose Object "Volunteer Opportunity" and Specify When to Start the Process "when a record is created or edited"

5) Define Criteria for the first Action Group. The condition applies to the field *[HOC__Volunteer_Opportunity__c].HOC__Image_Url_Thumbnail__c*. It evaluates that the filed does not have a thumbnail image already.

You also need to exclude Self-Reported volunteer opportunities by looking for the words "Self-Reported" or "Self-Reported Volunteer Hours" in the Volunteer Opportunity name: *[HOC__Volunteer_Opportunity__c].Name.*



6) Create an immediate action "Update Records" and name it "Apply Default Thumbnail". See the image below.



Make sure the name of your image file does have an opening or closing parenthesis. In some cases, images with parenthesis in their name are not displayed.

In the Formula value, use a formula similar to one below. You will most likely need to edit the script to:

1. Match your impact areas to the ones you use.
2. Upload your images to a place where you can reference them via a public URL. Salesforce does not have an elegant way to upload an image to an object since it does not have "File" field type. Hence, you need to decide where you are going to upload all your thumbnails. You can use Salesforce Files (or Documents but note that Salesforce will be retiring Documents) and make the URL public, or upload them to the HOC CMS. Use JPEG or PNG images.

```
CASE(TEXT([HOC__Volunteer_Opportunity__c].HOC__Primary_Impact_Area__c),
"Adult Education","https://cdn0.handsonconnect.org/ps-shared-images/impact-area-thumbs/
adult-education-1.jpg",
"Animals","https://cdn0.handsonconnect.org/ps-shared-images/impact-area-thumbs/animals-
2.jpg",
"Arts & Culture","https://cdn0.handsonconnect.org/ps-shared-images/impact-area-thumbs/
arts-%26-culture-2.jpg",
"Children & Youth Education","https://cdn0.handsonconnect.org/ps-shared-images/impact-
area-thumbs/family-services-2.jpg",
"Civic & Community","https://cdn0.handsonconnect.org/ps-shared-images/impact-area-
thumbs/civic-%26-community-2.jpg",
"Disaster & Emergency","https://cdn0.handsonconnect.org/ps-shared-images/impact-area-
thumbs/disaster-%26-emergency-1.jpg",
```

```
"Environment","https://cdn0.handsonconnect.org/ps-shared-images/impact-area-thumbs/
environment-1.jpg",
"Family Services","https://cdn0.handsonconnect.org/ps-shared-images/impact-area-thumbs/
family-services-1.jpg",
"Health & Wellness","https://cdn0.handsonconnect.org/ps-shared-images/impact-area-
thumbs/health-&-wellness-1.jpg",
"Immigrant & Refugee Services","https://cdn0.handsonconnect.org/ps-shared-images/impact-
area-thumbs/Immigrant-&-Refugee-Services-1.jpg",
"Senior Services","https://cdn0.handsonconnect.org/ps-shared-images/impact-area-thumbs/
Senior-Services-1.jpg",
"Sports & Recreation","https://cdn0.handsonconnect.org/ps-shared-images/impact-area-
thumbs/Sports-&-Recreation-2.jpg",
"https://cdn0.handsonconnect.org/ps-shared-images/impact-area-thumbs/Justice-&-Legal-
Services-2.jpg")
```

7) Activate and test your Process Builder!

System Forms

Organization Registration

Content Coming Soon!

Volunteer Registration

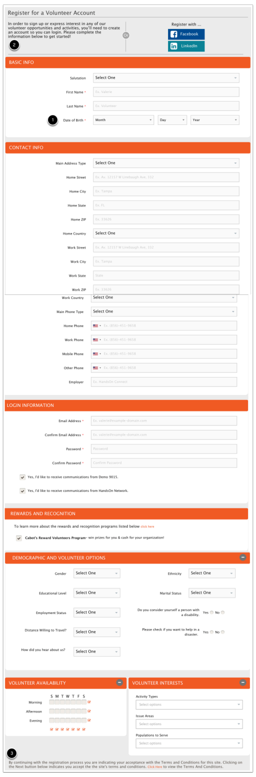
The Volunteer Registration System Form determines which fields are visible when a volunteer registers on the public site. It also allows you to edit the text that appears on that page if desired.

These fields correspond with fields in the contact record - so that filling them in will create content in the contact record.

Best practices are to limit the number of fields to just info you really want to know, so that registration isn't overwhelming. You can choose to make fields visible (or not visible), set default values in some cases (if its not visible), and whether or not a field is required. (The more fields you require, the longer it takes to complete a registration form -- so less is usually more when it comes to this page.

This form handles just the standard registration page. The Advanced Registration System (ARS) add-on to HandsOn Connect makes it possible for you to additional additional custom fields and workflows to the registration process.

How the volunteer registration page looks if you have every field visible



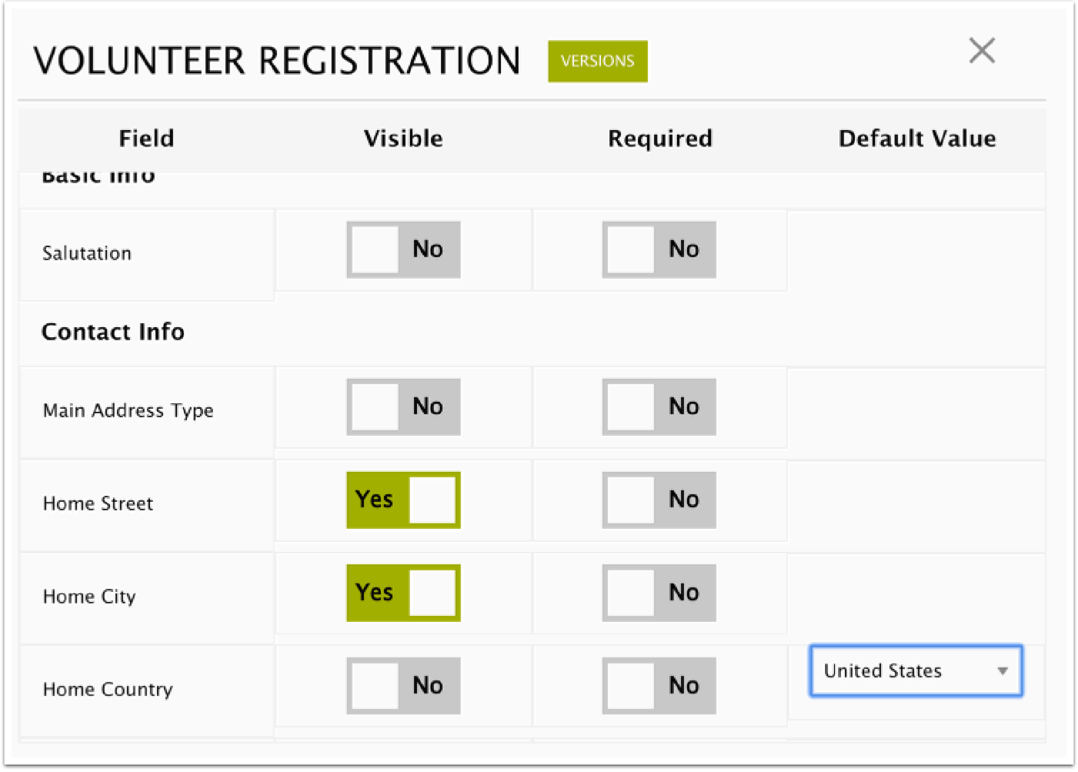
Choosing which fields to display on The Volunteer Registration Page

To choose which fields to display, and which to require on the page, in the CMS go to BLOCKS / SYSTEM FORMS / VOLUNTEER REGISTRATION

There you will see all the available fields. You can set which ones you want to have visible, which you want to require, and set Default Values for fields like "Home Country" that might be a waste of Volunteer's time filling in if everyone is going to be in the United States!

Use the sliders to indicate which fields you do and don't want to display, require, or to set default values:

(Scroll to see all the fields and set them as desired)



See information later in this article for info on some special considerations regarding the minimum age field, and the Main Phone Type field:

Text that you can edit on the Registration Page:

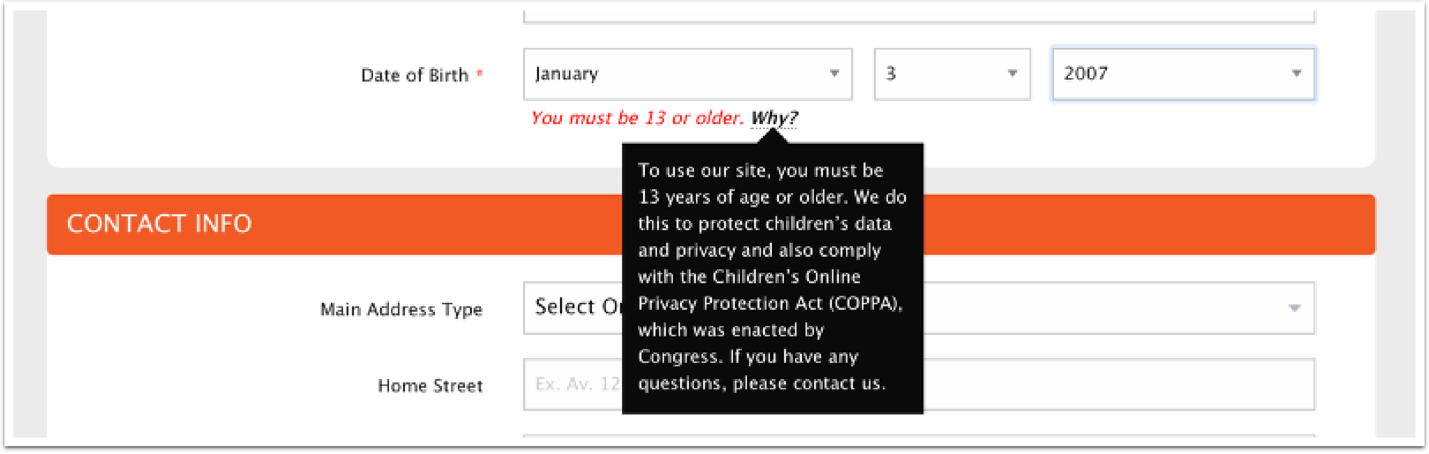
HandsOn Connect supplies default text that will meet most organization's needs -- however if you wish to edit displayed text you can do so in the second half of this system form.   Here is the text you can optionally edit:

1. Age Requirement Explanation:

This text appears if a volunteer doesn't meet the minimum age you've set for volunteers to register on the site. By default, its always set to age 13 to comply with Federal Requirements (COPPA) preventing anyone under the age of 13 from entering personal information on a website.

Here's the default text that appears:

If you change the default age (because you don't allow volunteers under the age of 18 for example, you can edit the Age requirement explanation to explain why you have that age policy. (NOTE: U.S. sites should not change the minimum age below 13 without consulting their legal counsel, as this would put you in violation of COPPA Federal Law.)



If you wish to change the minimum age for registering on the site, also update the field "Minimum age allowed to register" in this form. The default value is 13 in compliance with COPPA.

2. **Intro Text -** allows you replace the default text appearing at the top left of the form if desired.

3. **Submit Text -** This is the text that appears at the bottom of the page indicating that your accept the sites and conditions and linking to your terms and conditions page content.   You can edit this text and link it to other content if you prefer.

To display the default for these three sections of text on the page -- leave these fields blank in the Form.

Working with Phone requirements

The field labeled Main Phone Type (SF: Primary Phone?) displays on the public site as "Main Phone" and is mapped in the contact record to the more technical and less user friendly field labeled "Primary Phone?"   It has four picklist values ("Home Phone, Work Phone, Mobile Phone, and Other Phone") that correspond with the four phone fields you can choose to display and/or require.

You have several options here depending on which phone number(s) you want the volunteer to populate:

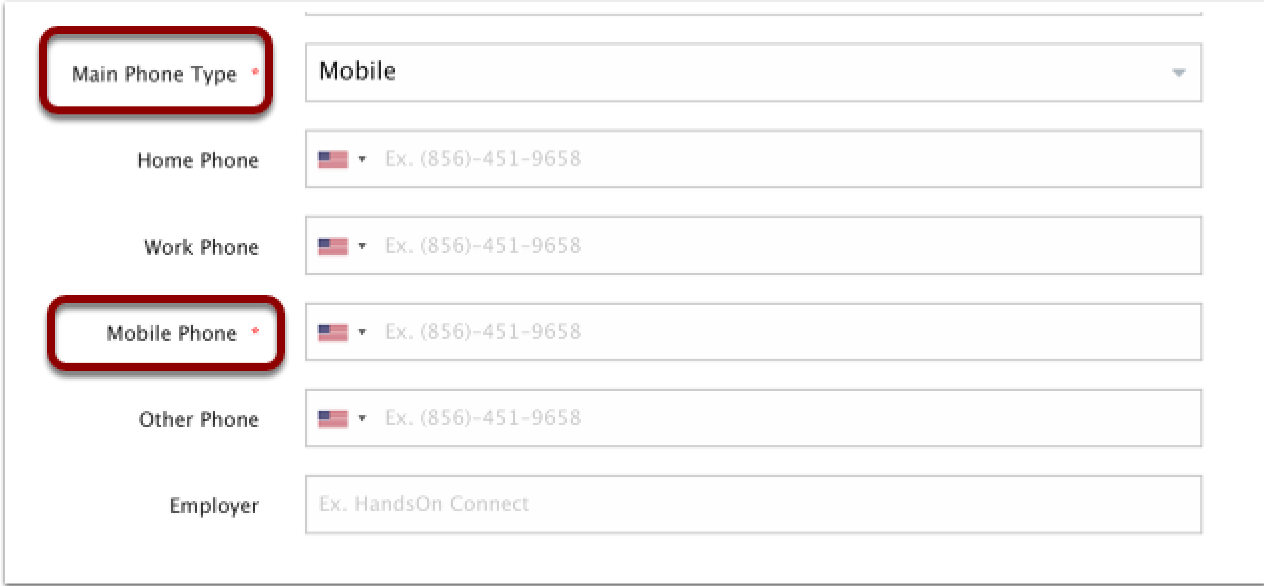
1) If you only wish to make one phone number visible (and/or required) - then you should probably not make "Main Phone Type" visible on the public site. You can then set the default

value for the field "Primary Phone?" to whatever phone type you are asking for on the public site.

2) You can choose to not display "Main Phone Type" and display several phone number options, which you can make visible and/or required as desired. (This however may mean you do not have a value for your default "Main Phone Type".

3) **Smart Phone Requirement setting:** If you make the field "Main Phone Type" visible AND required -- you should make the other phone types visible, and the system will require whichever phone type they select as "Main Phone Type" to be required. (i.e. if they say their main phone type is "Mobile" then they will be required to fill in a mobile phone number!   This ensures that at least one phone type will be required, and that it will correspond to the selected Main Phone Type.   (This will then appear in reports and records as the volunteer's "Primary Phone".   Neat!

On the public site it will look like this. Once a main phone type is selected - the corresponding phone will appear as required!   If you change the main phone type - then the new main phone type will be required!



What if I don't want to display all four phone types?

To simplify registration, you might not want to gather so many phone numbers. You might want to only ask for Home Phone and/or Mobile Phone.

In order to "Require" main phone type - but limit the phone types visible - you'll need to edit the picklist values in the Salesforce field "Primary Phone?". Whatever values appear in this SF picklist, will update the public site field "Main Phone Type"

HOW TO LIMIT THE PHONE TYPES AVAILABLE:

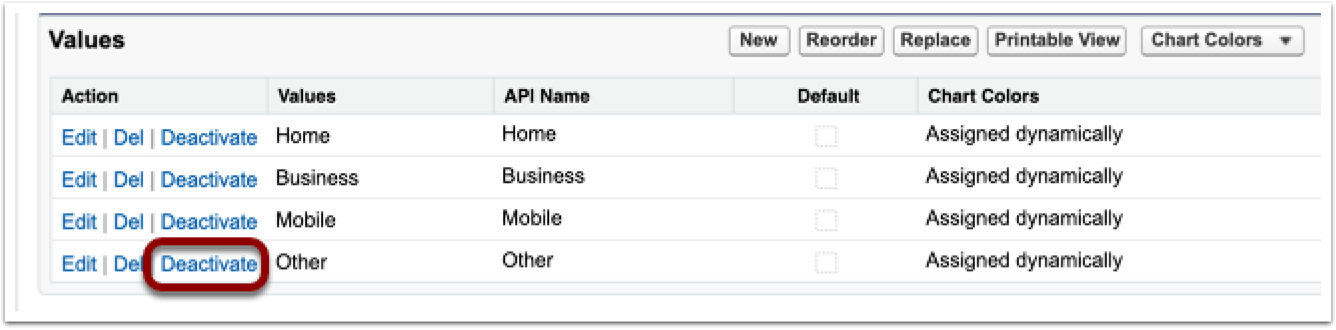
Let's say you don't wish to display "Other Phone" as an option or a field in the registration form. We first need to update the picklist values in the field "Primary Phone?" in Salesforce Go to Setup / Object Manager / Contact / Fields & Relationships. (In classic, you get there through setup).

Click on the field "Primary Phone?" and you'll see the four picklist values Home, Business, Mobile, Other. CLick on "Deactivate" for any field you no longer wish to use as a choice.

Once you do this - you can go back into the CMS - and make that field hidden, and the Main Phone field required. The picklist will now only list the three active values in the Salesforce picklist.

> Before deactivating one of the picklist values, make sure you do not have it visible or required in the CMS.
>
> When you deactivate one of the phone types - allow 15 minutes or so before then requiring that "Main Phone Type" is visible and required in the System Form. The SF

changes have to synch with the CMS and while sometimes it happens very quickly, it can take up to an hour before you see the change in the CMS.



Don't forget to also update the system page "Personal Information"

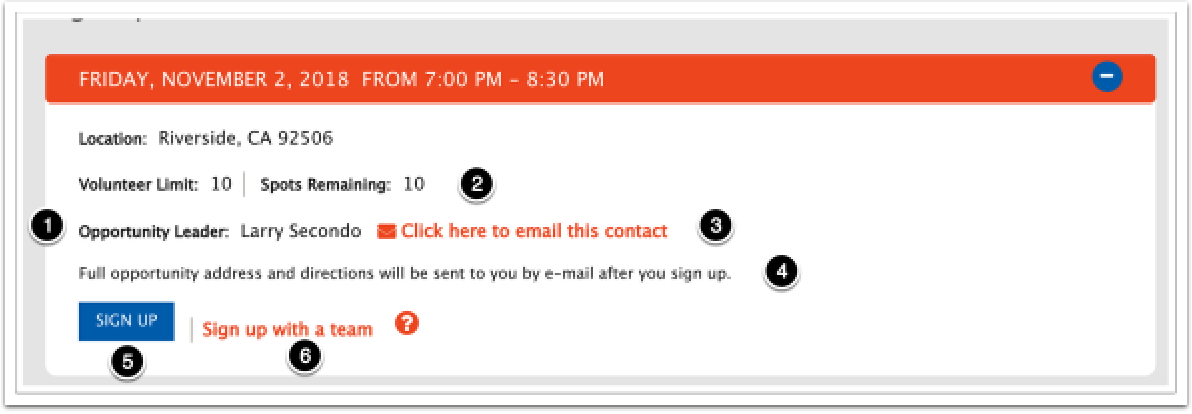
The Personal Information page allows a volunteer to update any of the data they entered during registration. You should make sure that you configure the personal information page to have much the same settings as your Registration Page. (You may choose to display fewer fields in the Registration Page (to make registration qjuicker), and display more in the Personal Information Page (so they can fill it in later).   But make sure your requirements on the personal info page match the ones you've put on the Registration Page.

Personal Information

Content Coming Soon!

Opportunity Detail Page

The Opportunity Detail Block allows you to control the display of a number of items in the occurrence portion of the opportunity detail page



1. You can choose to hide the display of the Opportunity Leader

2. You can choose to hide the envelope icon and the ability to email the opportunity leader.

3. You can change the text "Click here to email this contact"

4. The html text that appears can be edited. (Different text is used by default for each opportunity type)

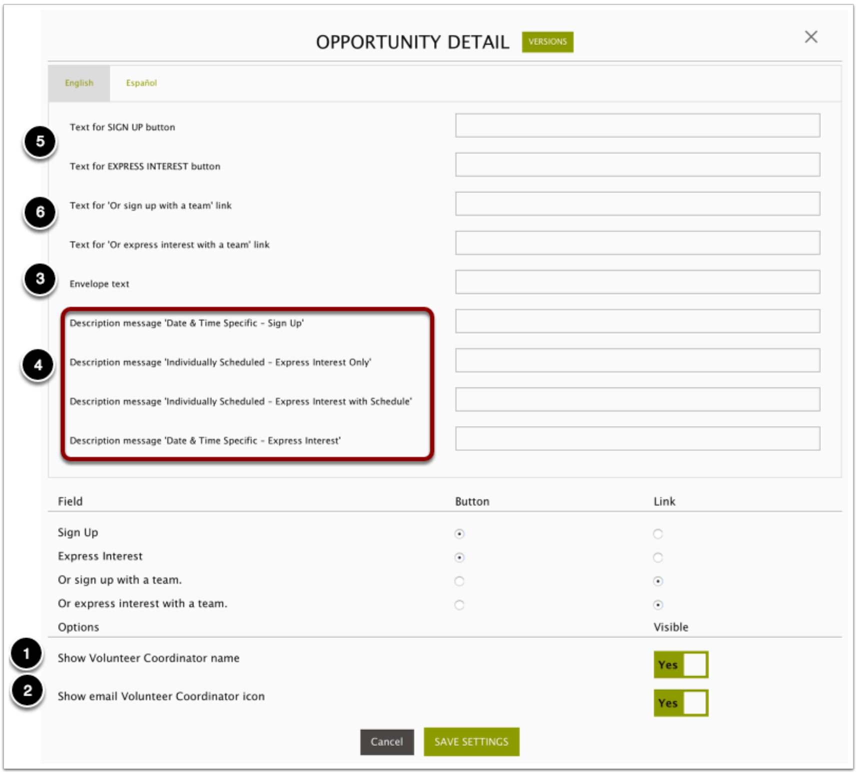
5. The Sign Up button can be changed to a link instead of a button, The terms "Sign Up" and "Express Interest" can be changed if desired.

6. The Sign up (or express interest) with a team link can be changed to a button, and the text can be changed if desired.

As well as if you want to display these as button or link.

To get the to the Opportunity Detail Block, navigate to any on your Opportunity Detail pages (or in the CMS go to*Blocks > System Forms > Opportunity detail page*) and click on the edit icon on the top right of the opportunity detail page section.

The block screen is shown below. (If a field is left blank - the HOC default values are shown)



Leave the fields blank for the HandsOn Connect defaults. They will automatically populate on the site with the default text.

Before changing the labels and/or the Description Messages - be sure to look at the defaults so you know the recommended messaging associated with each Opportunity Type.

Also, be aware that if you rename "Sign Up" and "Express Interest" you'll probably want to update success pages and email templates to match your new terminology so people won't be confused by buttons that say one thing on the public site - and email templates and success pages using the original terminology "Thanks for expressing interest" or "Thanks for Signing Up".

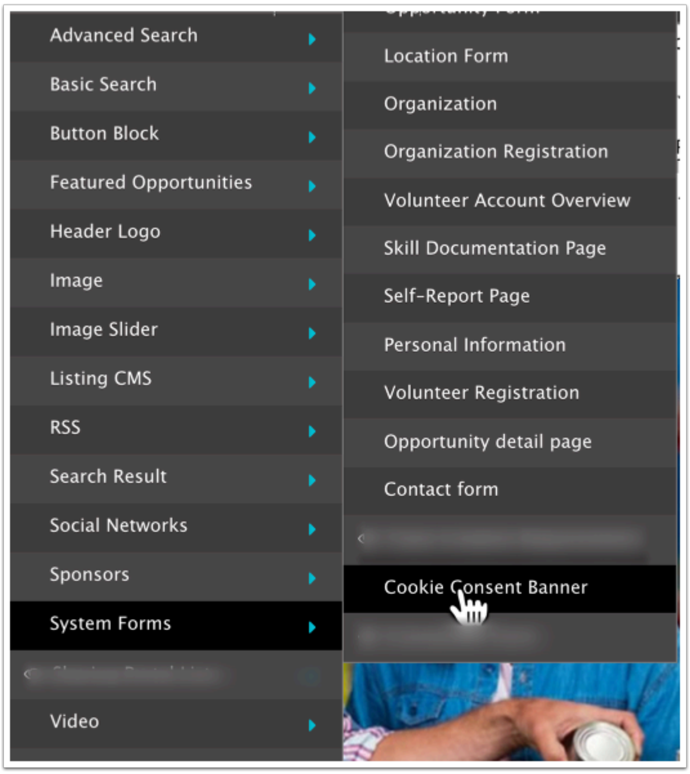
Cookie Consent Banner

You've all heard of the GDPR, right? New laws in certain countries making sure that websites alert users when cookies are being used, privacy policies, etc.

We've now added to the CMS options, the ability to place a cookie consent banner on your site! You've seen these - they are popping up on websites all over letting you know the site is using cookies. Then users dismiss them, and at least know that this site (like almost all sites these days) is using cookies to store information :-)

In your CMS, you'll now see a new option:

Go to Blocks / System Forms / Cookie Consent Banner if you wish to activate the banner:

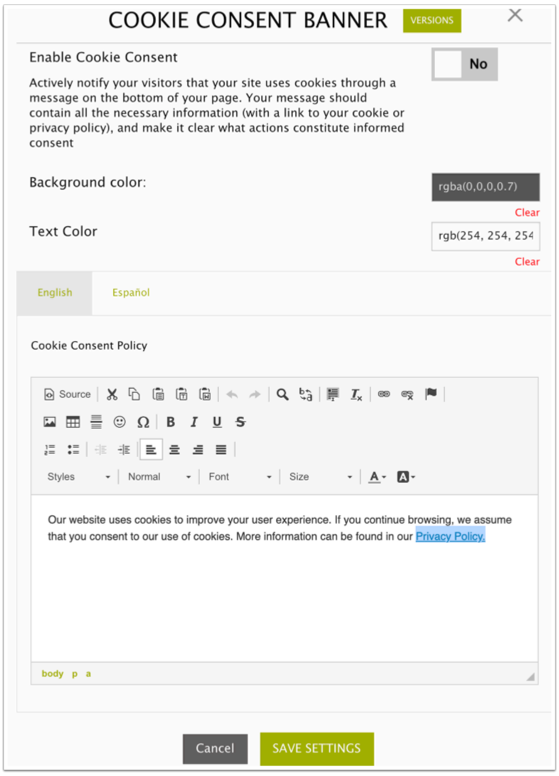


This is off by default, but you can click 'enable cookie consent" to turn it on. You can set the background color and the text color as you wish.

We pre-populate a default cookie consent policy which is:

"Our website uses cookies to improve your user experience. If you continue browsing, we assume that you consent to our use of cookies. More information can be found in our Privacy Policy." The words 'privacy policy' are linked to the page /privacy-policy on your site.

You can edit the text that appears as you wish. (Note however that if you edit it, you can't restore the original text, so keep a copy of it.

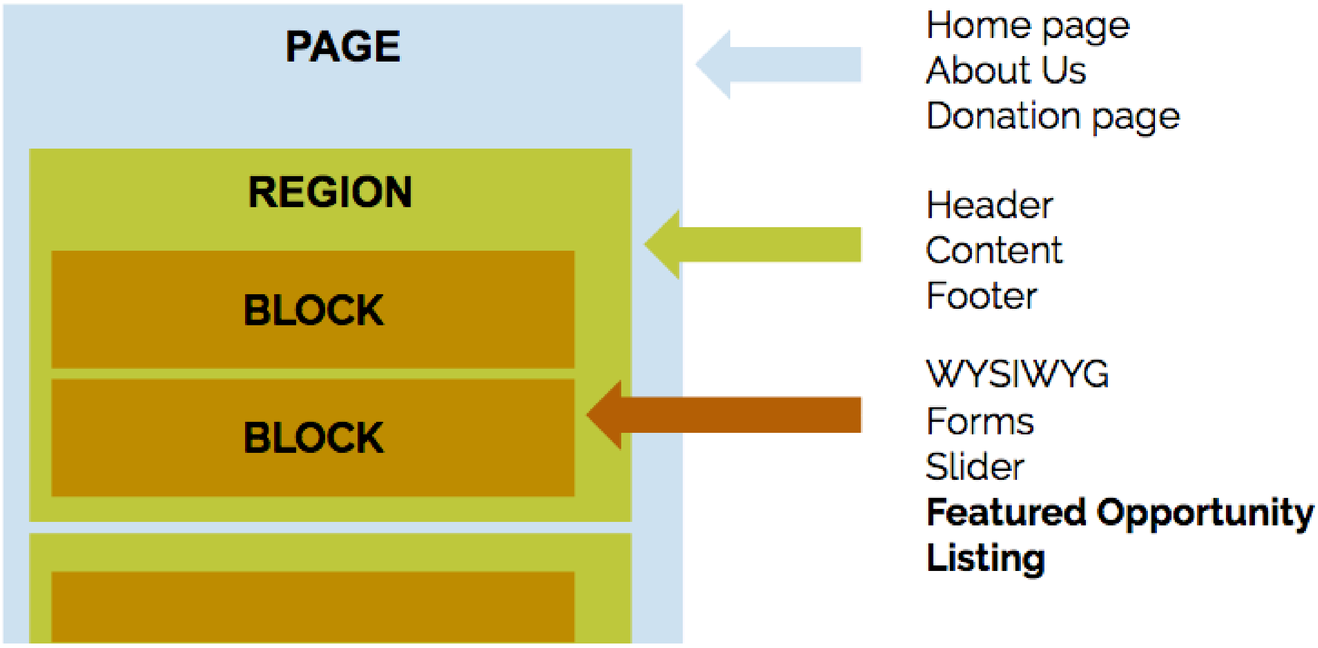


Here's what the banner looks like on your site when its enabled. It appears on the bottom of the page and once dismissed (by clicking the x) it will not appear again in that browser for about a year. So its a one-time notification.

Regions

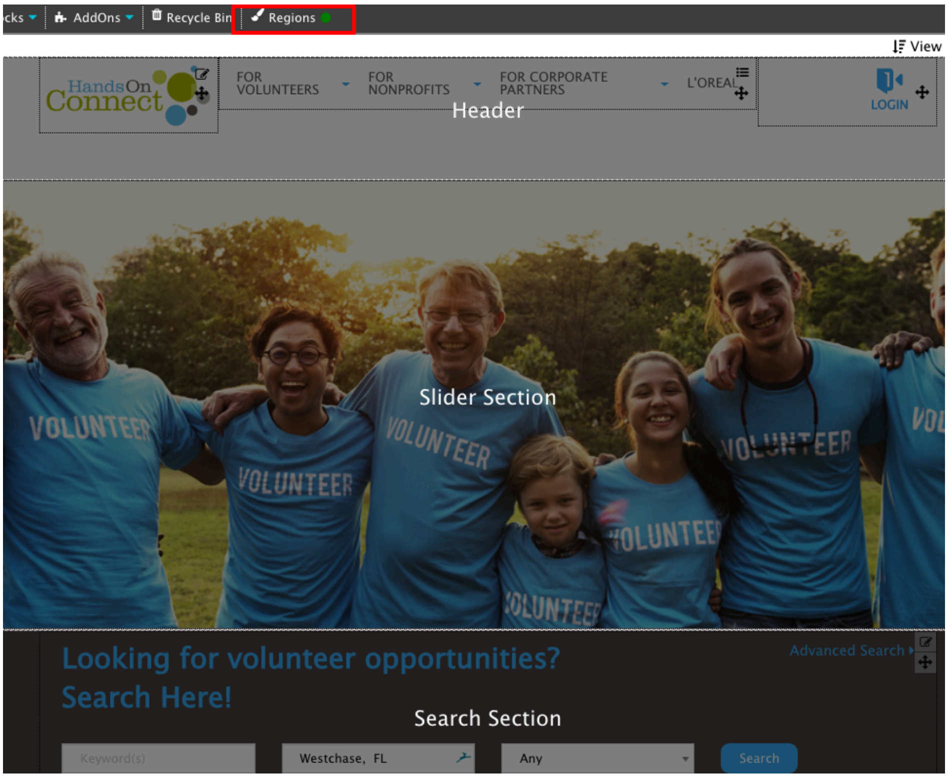
Working with Regions (CMS)

When working with your Public Site, your content (e.g., page copy, images, videos, forms, search results) is structured in **pages**, which contain one or more **regions** (e.g., header, main menu, main content, footer), and these contain your **content blocks**.



A region defines an area of a page where you can place content using blocks via the Content Management System (CMS). You can place more than one block in a region, assuming the region has enough space to fit them.

To view the different regions on a page, use the CMS utility bar (black menu bar at the top) option labeled "Regions". When you click on it, the CMS will highlight the different regions of the page layout you are looking at:



In the screenshot above, you will see that the "Header" region contains three blocks, from left to right: a Header Logo block, a Menu block, and the Login/Logoff block. The "Slider Section" region has only one block, an Image Slider block.

Click on the "Regions" link again to turn off the region highlights.

You cannot add or edit a region, but our team can help if you need to do this. Contact us through our support team.

Recycle Bin

Using the Recycle Bin

Content Coming Soon!

Add Ons

AddOns Overview

AddOns are modules that can be added to your HandsOn Connect instance to extend its features. Some are free and others are paid. For example, you may want to add the ability to capture a donation or provide a branded subsite to a community or corporate partner.

Some AddOns appear in your CMS under the Addon menu item, while others are integrated into a specific section of HOC or accessed via Salesforce.

Some of the HOC AddOns we offer are:

- Form Builder (free)
- URL Redirects (free)
- Check-in/out Kiosk (paid)
- Advanced Registration and Sign-up (paid)
- Parental Consent (requires the Advanced Registration and Sign-up)
- Background Checks (requires an account with Verified Volunteers + support fee)
- Donations (requires an account with a payment processor such as Click & Pledge + support fee)
- SMS Messaging (requires an account with an SMS message service such as MogliSMS + support fee)

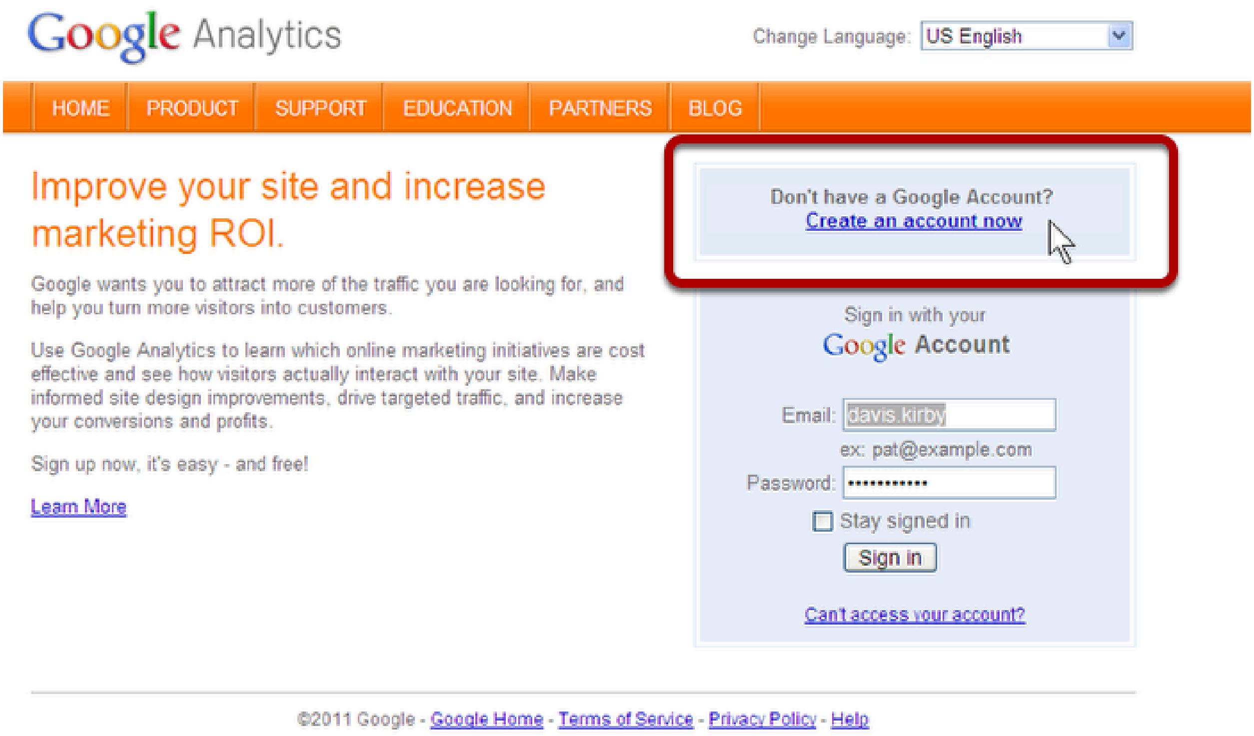
We also offer to install and support add-ons (apps) for Salesforce, usually as a paid service, such as:

- Nonprofit Success Pack
- Conga
- Spanning Backup
- Mass email apps such a Constant Contact or MailChimp
- Click & Pledge or other donation apps
- Just about any app you see in the Salesforce AppExchange!

Google Analytics

Tracking the performance of your site has never been easier. With HandsOn Connect you can use Google Analytics natively to track all your Web site stats.

Sign up for an account at Google Analytics.

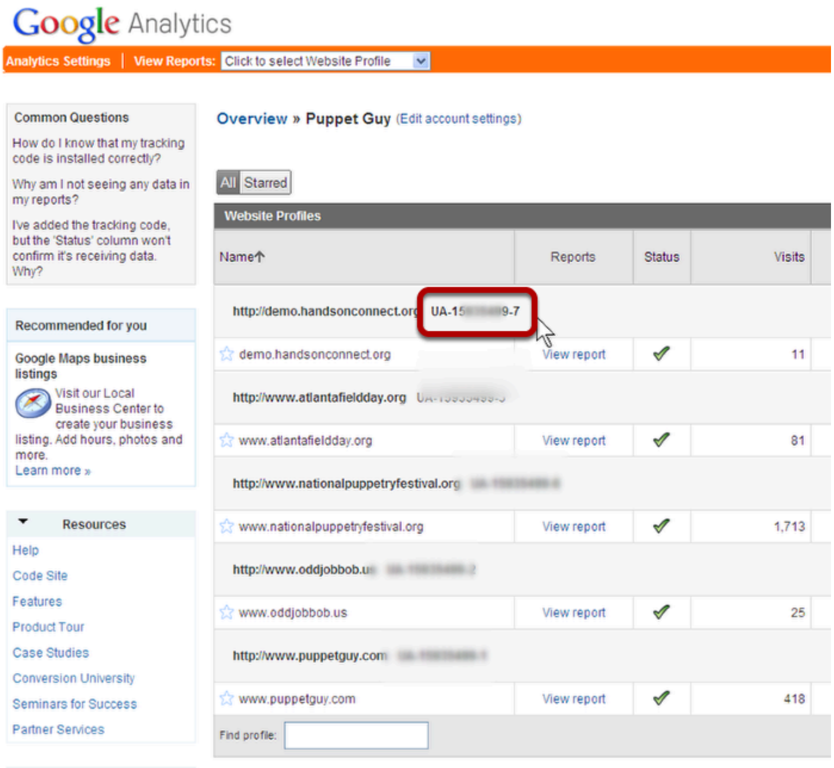


If you have not already done so for other websites you manage, visit www.googleanalytics.com and set up an Account.   They will walk you through the process.

Add a new profile in Google Analytics and enter the domain or full URL for the site you want to track.

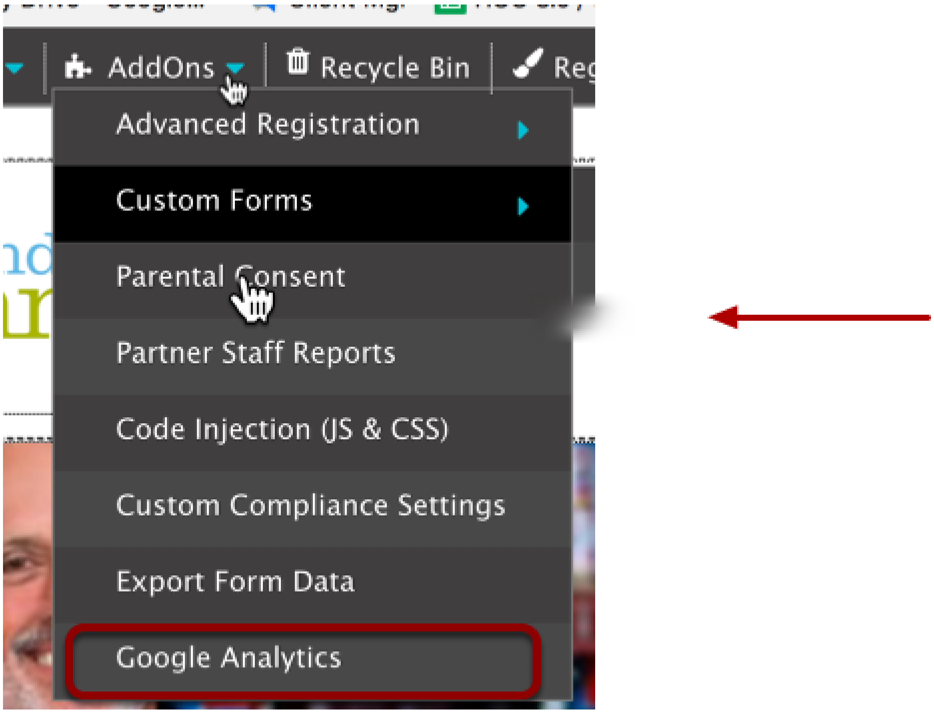
They will ask you the main page of the URL you are tracking. If you are doing this before GOLIVE, you will have a force.com website. Once you go live, you can always go back in and create a new Website to follow by creating a new Profile. When you finish this process, Google Analytics will give you all this code that you have to put in your website on every page. We aren't going to use this code. You can just ignore it. Salesforce already has Google Analytics integration.

Copy the Web Property ID



The Web property ID starts with the letters UA followed by your account and profile numbers. For example, UA-9049246-2.

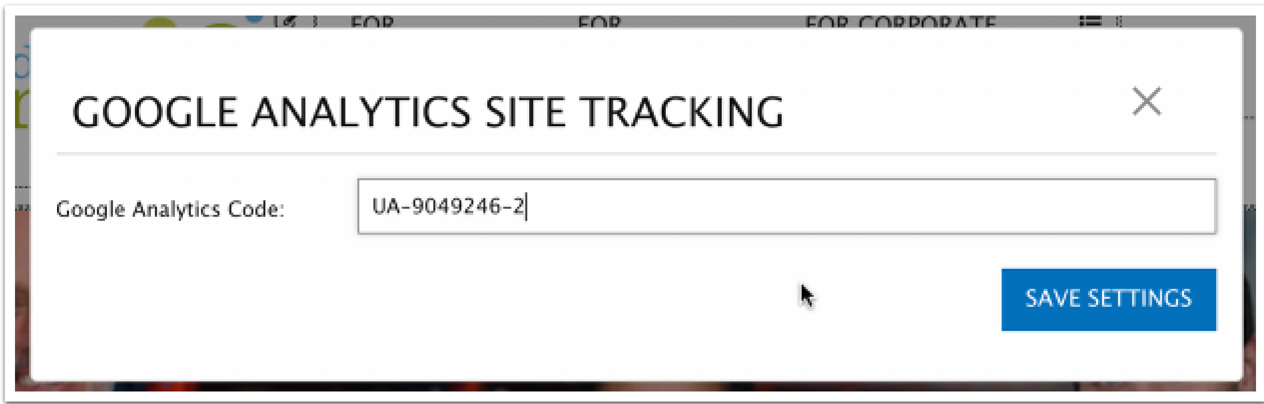
In the CMS choose Google Analytics from the Add-On Menu



Paste your code (for example) UA-9049246-2 in the form, and click Save Settings.

In 24 hours your site statistics will start to show up when you log into your google analytics account.

You can learn more about using google analytics from the extensive help pages that are part of Google Analytics



Advanced Registration System (ARS)

Advanced Registration & Sign-up Module (ARS)

The Advanced Registration & Sign-up Module (ARS) is a paid add-on module licensed on an annual basis. If you are interested, please contact our support team for pricing and activation.

Introduction

With Advanced Registration & Sign-up Module (ARS), it's easier to register new volunteers with a customizable registration. Manage forms, compliance forms, donation requests, success pages, etc.

The ARS is a very powerful module that allows you to add custom questions and workflows to the following user processes:

- Volunteer Registration (create a new volunteer account)
- Volunteer Sign-up (express interest or sign-up to a volunteer opportunity)
- Partner Registration (create a new partner/sharing-portal account)

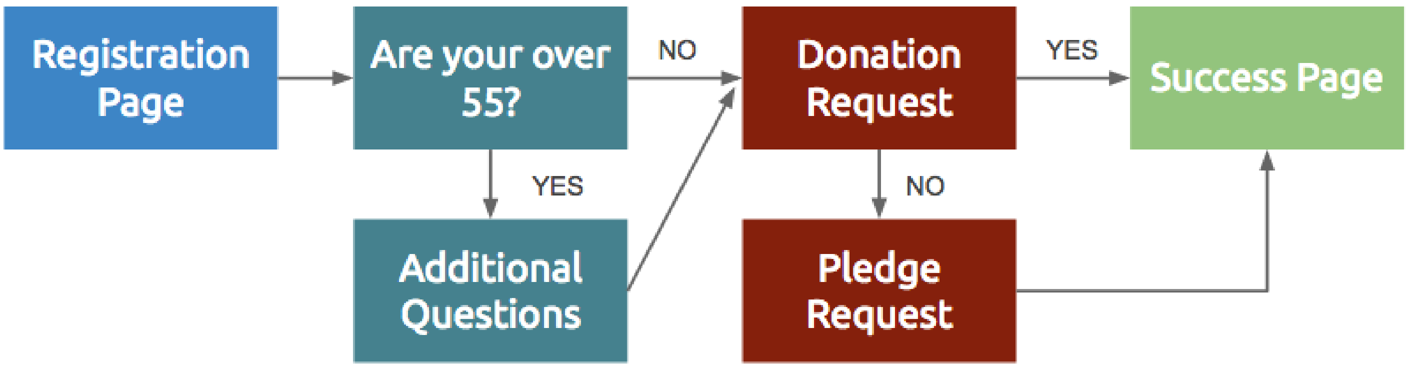
With the ARS you can add custom questions using an interface similar to the Form Builder, add HTML content, ask for a donation, and add waiver-like checkboxes to each to the processes above. You can also create multi-step or multi-page "journeys" that with logical branching, that is, add conditions that use to user's answers to determine the next set of questions or pages.

If you think of each of these user processes having a start page, in the form of a registration page or an express interest (or sign up) page, and an end page such as a success/confirmation page, the ARS allows you to add and customize between these two pages and add new pages, forms, waivers, etc.

Here are some examples of what you can do with the ARS. You may want to:

- Ask a volunteer a different set of questions if they are over a certain age when they create an account.
- Require that the user accept a waiver before continuing
- Add a donation opportunity or an activation fee
- Ask for a volunteer's t-shirt size when signing for a volunteer opportunity

And you can combine these with branching logic. For example, you can ask a senior person a specific set of questions, as well as ask for a donation, in a workflow that might look something like this:



Combined with Salesforce's workflows and automation, you can build almost any user registration or sign-up journey you desire!

Prerequisites

The Advanced Registration & Sign-up Module (ARS) is an advanced module. You should be well versed in HandsOn Connect, Salesforce, and the [HOC CMS](), including the [HOC Form Builder](). General web skills, such as HTML will also come in handy.

This help article is not meant to be an exhaustive step-by-step guide on how to use the ARS. The ARS can be used in so many ways. It would make a very long document if we covered all it can do and all the cases. Instead, this article is meant to provide a starting point and let you explore its features. Plan to spend some time doing trial some trial and error, and testing and refining what you build.

Getting Started with the ARS

Once the ARS is activated on your HandsOn Connect (HOC) instance, start by watching the *Connect University Advanced Registration System* video:

Once activated, the ARS will be accessible via the CMS top utility bar under the AddOns menu:

You will see that there are three user processes that for which you can customize using the ARS:

- Volunteer Registration
- Partner Registration
- Opportunity Sign Up

The first two, the registration processes, allow for one ARS workflow each. The last one, the Opportunity Sign Up, provides for multiple ARS workflows, since you can create different workflows which can be triggered for a specific Volunteer Event, Volunteer Opportunity or Occurrence.

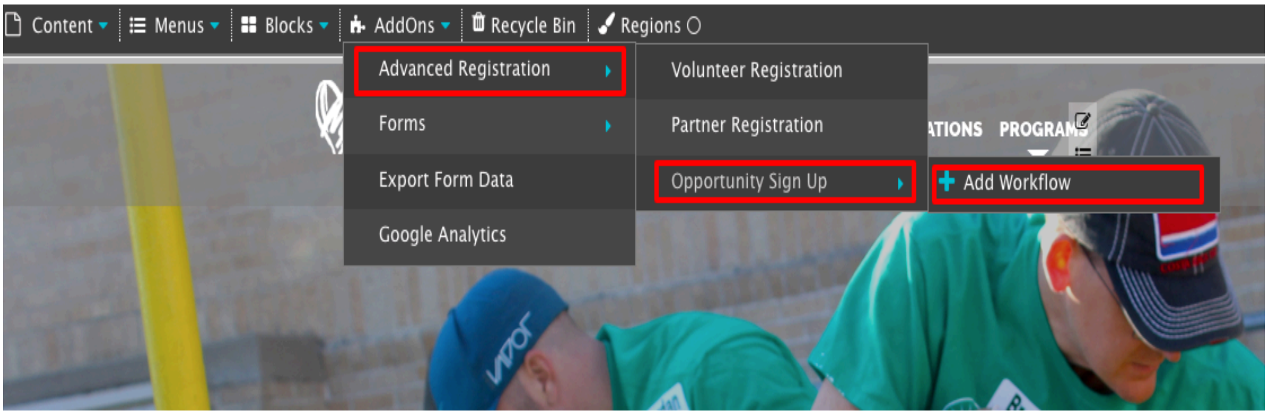
To illustrate how to use the ARS, let's use an example.

Workflow Example: Volunteer Sign-up with a Donation

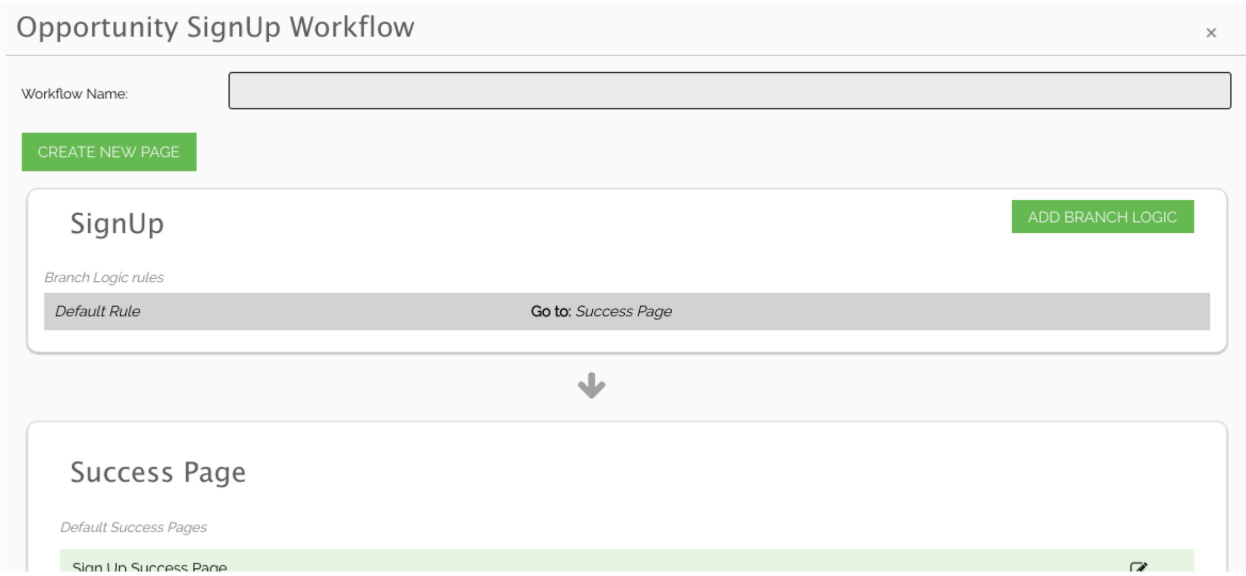
The case we will use as an example is that you want to request a donation when a volunteer signs-up for a specific opportunity. Note that this example requires that you have a donation integration set up with Click and Pledge (C&P) or Paypal (other payment processing providers may be available or added upon request).

These are the steps you would follow:

1) In the CMS, go to AddOns > Advanced Registration > Opportunity Sign Up > Add Workflow



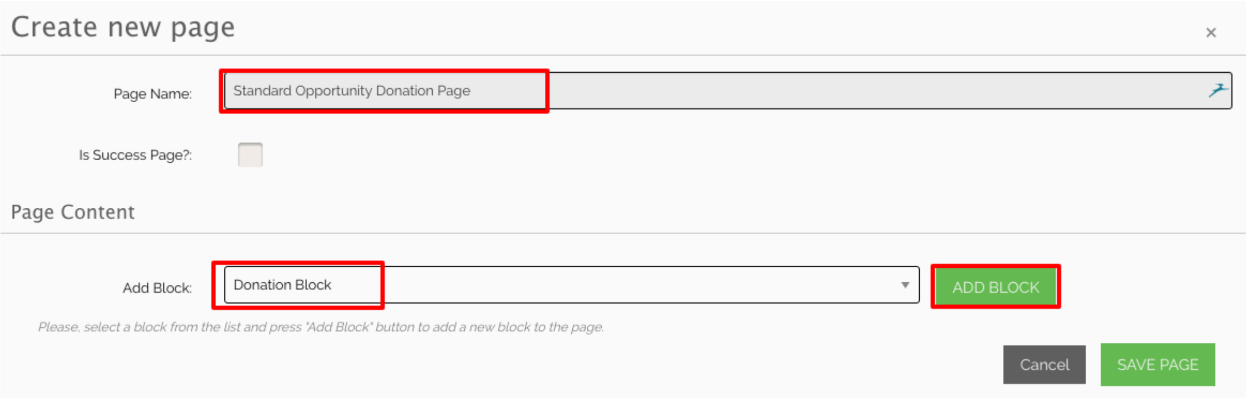
2) This will open the Opportunity Workflow screen:



3) Give the workflow a name that will be unique (this is important). For this example, we are going to use "Standard Opportunity Workflow."

4) Click on the "CREATE NEW PAGE" button:

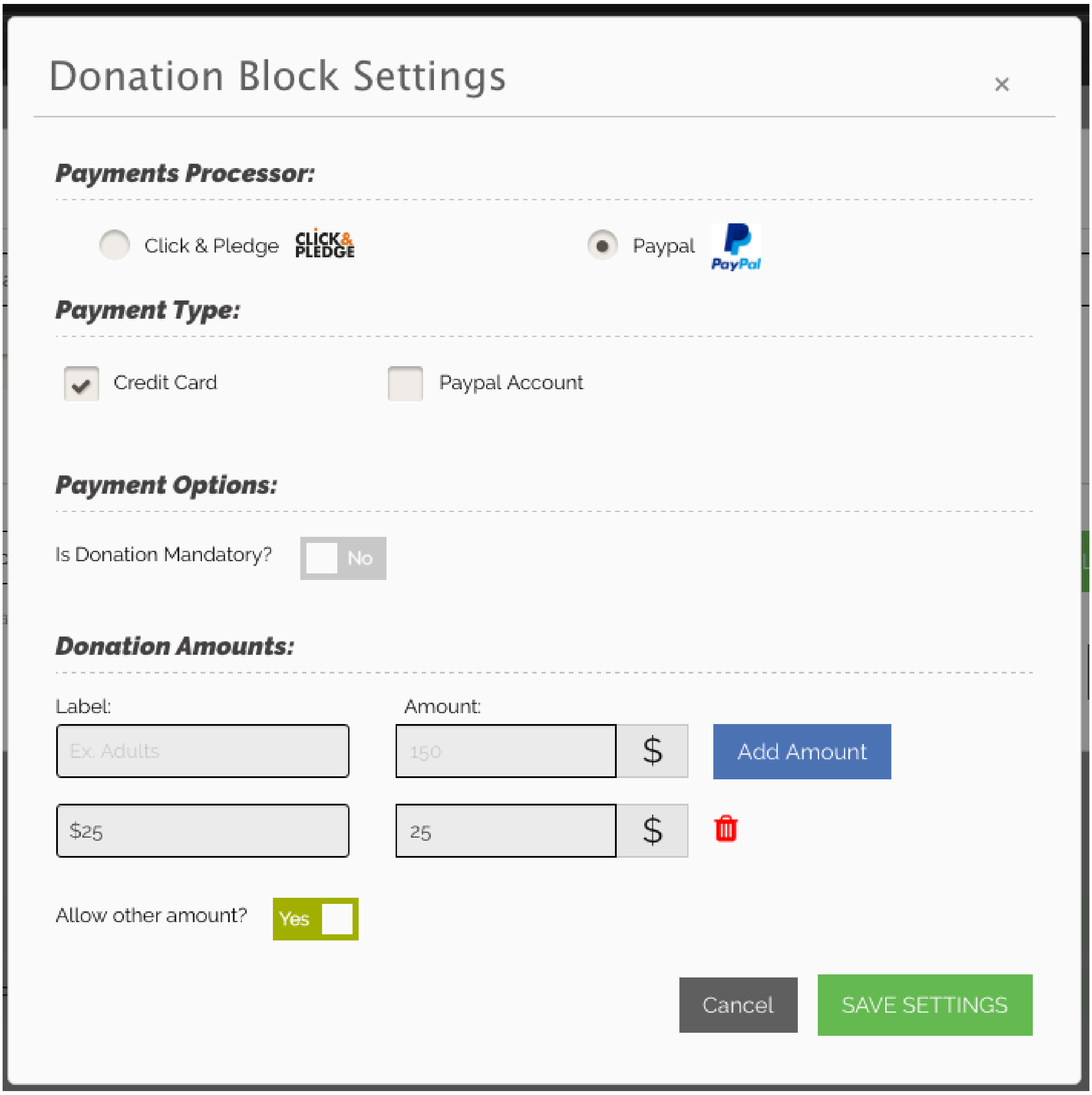
5) Give the new page a unique name. We are going to use "Standard Opportunity Donation Page," under Page Content > Add Block select "Donation Block," and then click on the "Add Block" button.



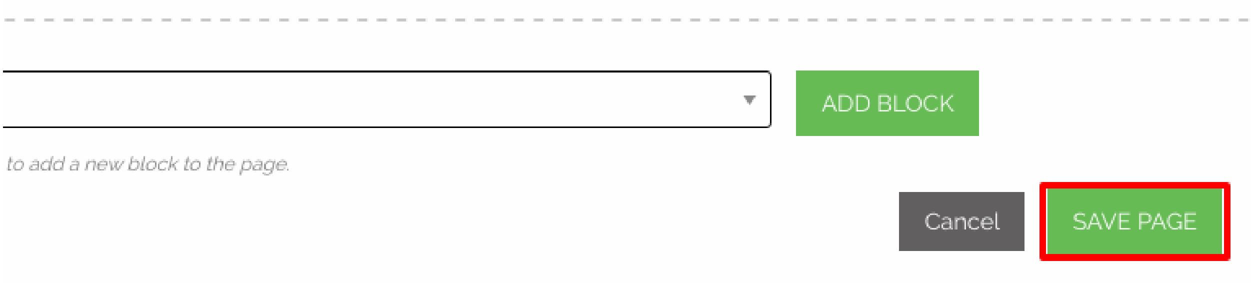
6) In Donation Block Settings select:

1. Payment Processor: Click & Pledge or Paypal
2. Payment Type: Credit Card and/or Check (with C&P) or Paypal Account (with PayPal)
3. Is payment mandatory? (If selected, the user will need to pay the donation amount to signup for the opportunity)
4. Donation Amounts: You must have at least one amount
5. Allow other amount? Select if you want them to be able to enter a different amount

Remember to save your settings!



7) Save the page:



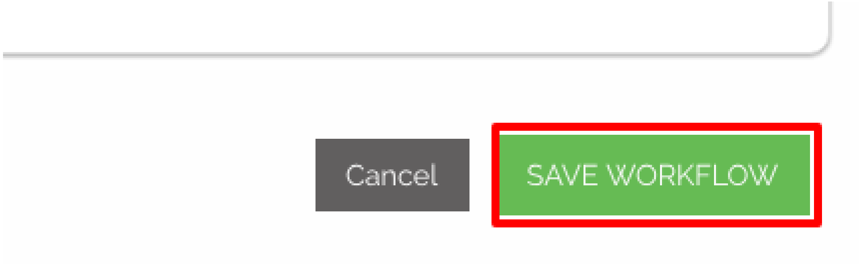
8) Set up the Branch Logic.

By default the first page in the workflow goes directly to the Success Page. Click on "Add Branch Logic" and define the next 'page' of your workflow that you wish to appear. In this case, we would select "**Standard Opportunity Donation Page"** in the 'Go to' picklist.

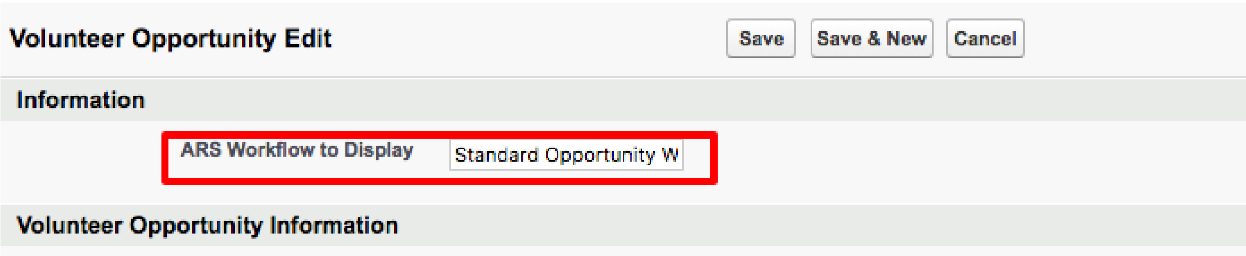
Then set the branch logic on the Donation page to go to the success page. (This tells the workflow which page to go to each step along the way.

(Advanced: You can also "Allow Conditions" and create conditional logic based on fields on pages that use "Form Blocks".   For example, you could say, IF the value of a given picklist matches a certain value, go to one page, and if it matches something else, go to a different page).
Be sure to create branch logic for each page, whether you use conditions or not — as the branch logic tells the workflow which pages to present in which order!)

9) Save the Workflow



9) To associate this workflow with an opportunity, you need to remember the unique name you gave the workflow in step 3. In this example, we used “Standard Opportunity Workflow”.   In Salesforce, go to your opportunity and enter this name in the field called “ARS Workflow to Display” and save your opportunity:



Remember to save your opportunity!

Note, if do not see the “ARS Workflow to Display” field it probably just had to be added to the page layout.

You can add this workflow to as many opportunities as you wish, as well as to Events and Occurrences.

Note: When testing your workflow - be aware that HandsOn Connect uses multiple servers. Sometimes you'll edit the workflow in one browser or tab — and then when you log into your site for testing purposes (in another browser or incognito window), you won't see the workflow immediately. It can take as much as an hour before all the servers for HOC are synched up with your latest changes.

Also Note: When adding the ARS workflow to an event, it may take overnight before the event is refreshed in the search server. To test the workflow as soon as possible, place the ARS Workflow name in the Volunteer Opportunity Record or the Occurrence record.

Additional Information

For information on the *Unverified Parental Consent Module* click here.

Using Branch Logic

After you have created the various pages in your ARS workflow, you can use branch logic to determine which page to display as you proceed through the workflow.

Branch logic can set 'conditions' (criteria) that can be applied, and depending on when the criteria is met - you can direct the workflow to present one page or another.

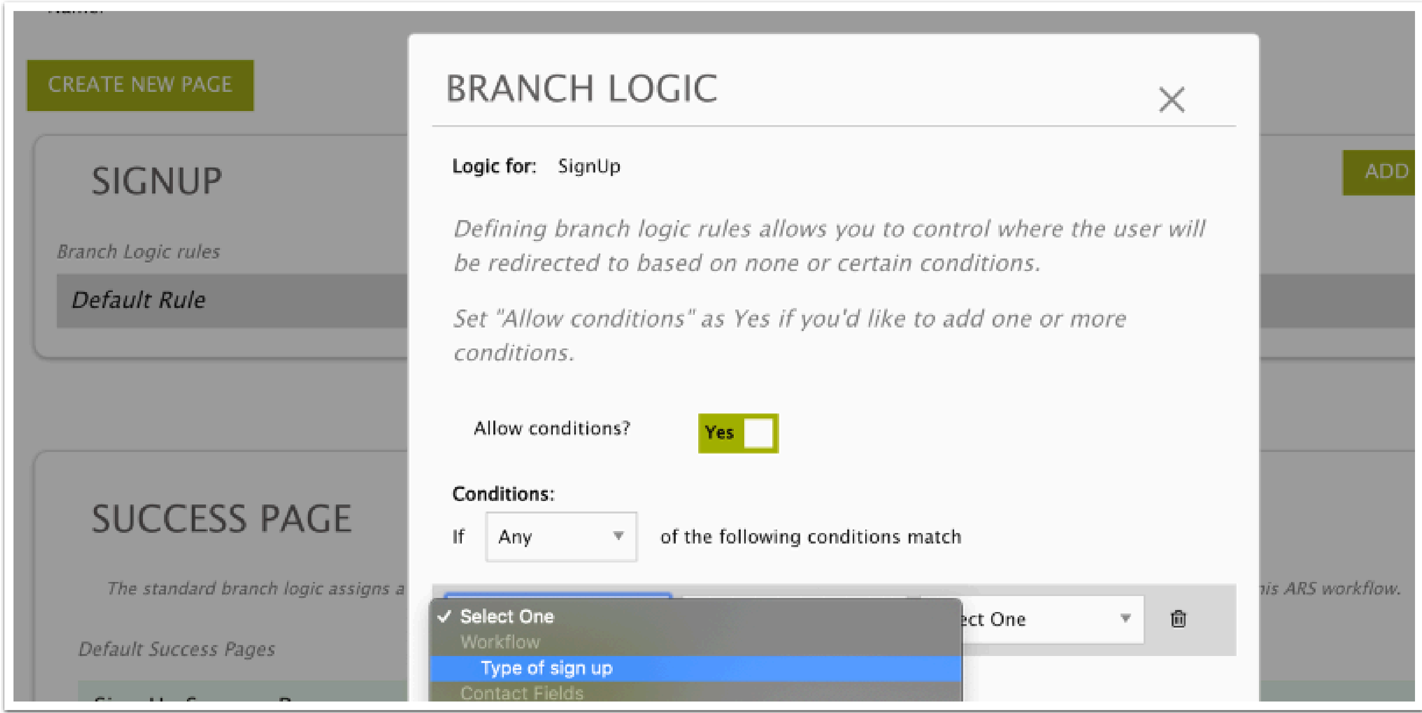
More details on how to use criteria in branch logic will be published here in the future.

ARS Branch Logic for Opportunity Signup by individuals / teams

One of the features of the ARS is the ability to create branch logic in its workflows. This article describes branch logic that is available for ARS workflows related to opportunity signup. This logic allows you to define separate pathways in an ARS flow for Team Captain signup vs Individual Signup.

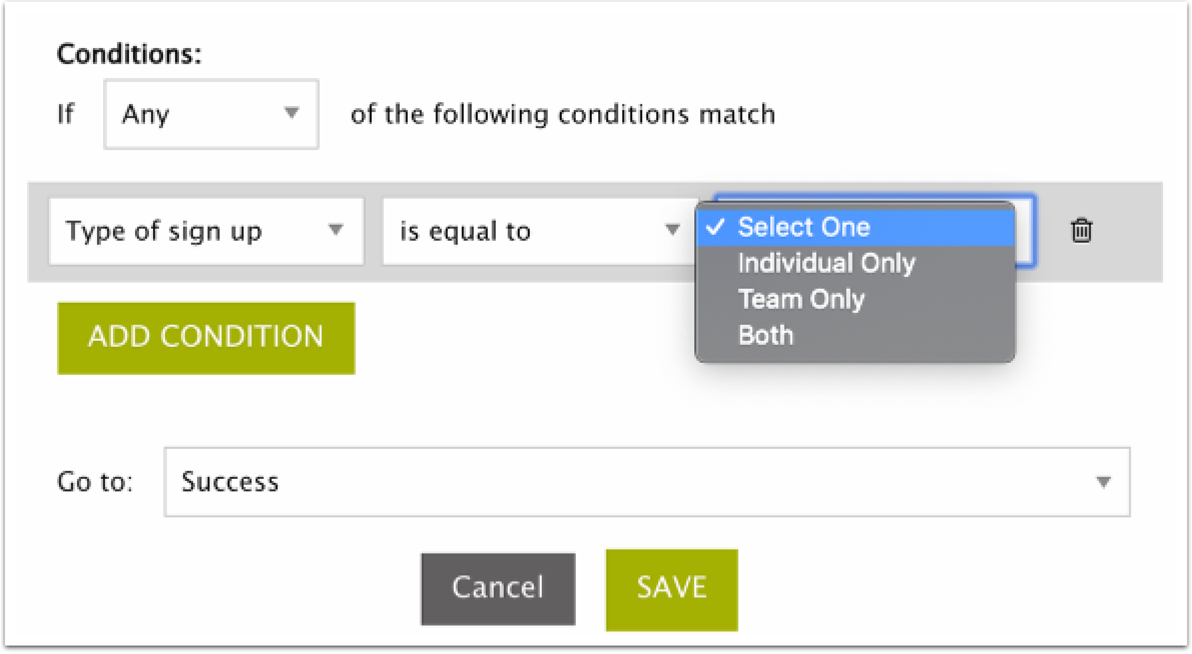
Here's how it works:

At any page in the workflow, (or as may often be the case, starting with the SIGNUP page... you can set branch logic to "Type of Signup"

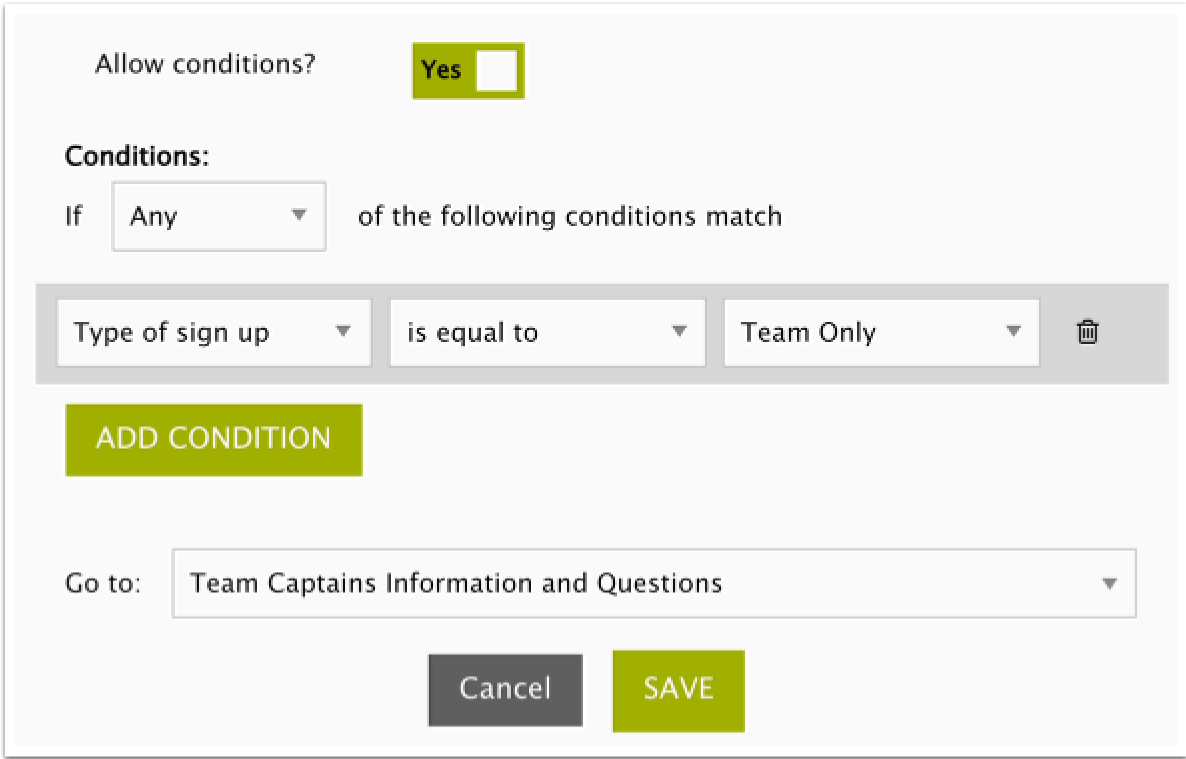


Then use 'is equal to' and choose whether the branching is for Individual Signups, Teams Signups, or Both.

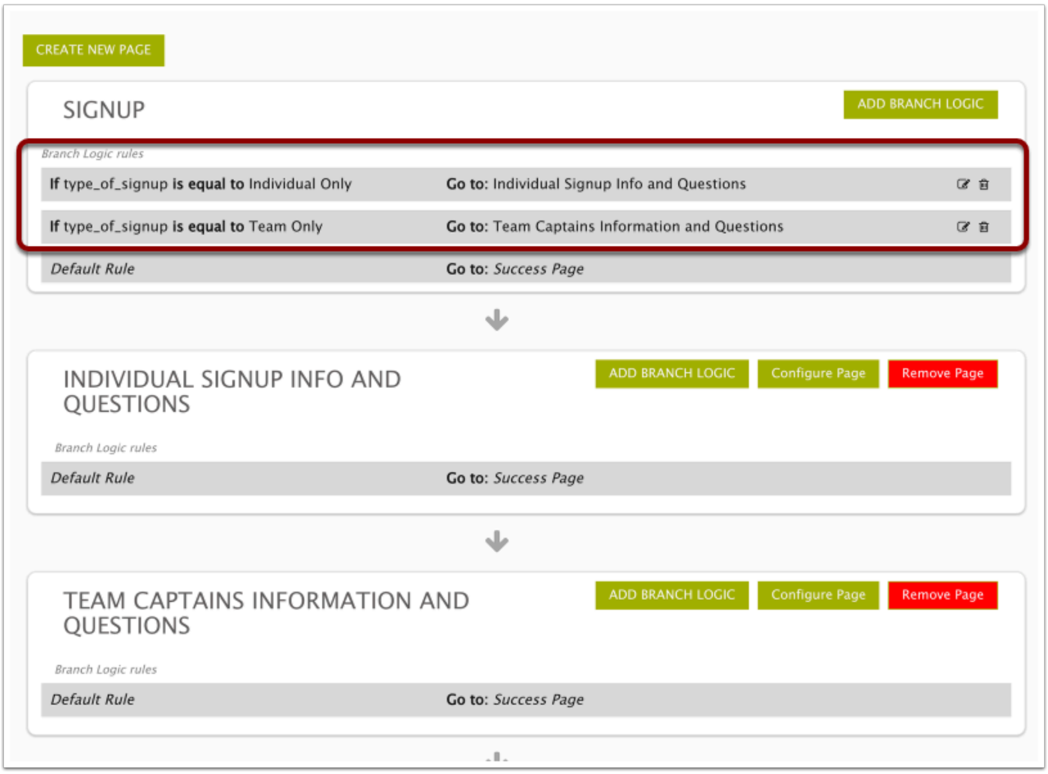
(Note: You do not have to select 'both' if you don't want to for internal clarity. If no signup criteria is selected, the workflow will proceed to the same next item in the workflow for both team and individual signup.



Then set the page to go to for Individual SIgnup, and set a branch logic for the page to go to for Team Signup.



This allows you to create a simple workflow that looks like this:



1) In the team workflow -- any form questions that are asked, are asked only to the team captain (and can be populated on the Team Captain connection. The workflow does not present the same questions for each member of the team separately.

2) The workflow for team captains is presented BEFORE the team captain is asked to select (or create) their team and specify which team members will attend. That dialog happens AFTER the ARS workflow pages are presented, and before the final success screen.

Custom Forms

Working with Forms (Videos)

Forms are powerful but can have a steep learning curve. They allow you to get information from users and retrieve that information. They also can be integrated directly with your Salesforce data to create new records and/or update existing records.

Detailed training and documentation on forms will be added here in the future -- but these two HandsOn Connect University videos can walk you through the basics of using forms.

Introduction to the Form Builder

Form Builder Part 2:

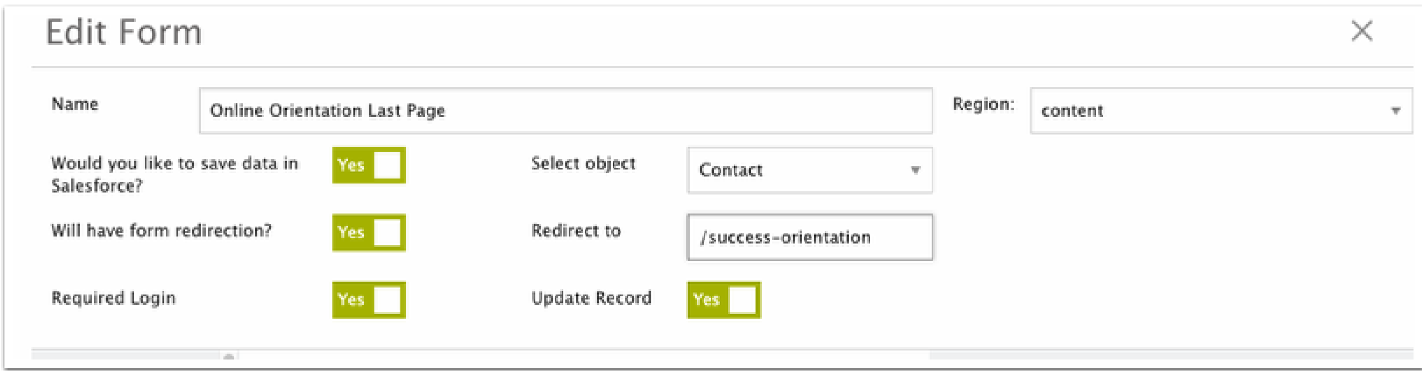
Sample Form: Online Orientation Completion Form

Here are the elements of a form that could be placed on the final page of an 'online orientation'.   This form would, when the user clicked on the submit button, update their contact record by putting a true checkmark in the field "Orientation Completed" and set the value of "Orientation Completed Date" to the date the volunteer clicked on the submit button.

A page with this form could be created as the last page in one or more 'online orientation' pages you create -- and could be used to update the contact record so the volunteer could subsequently sign up for any volunteer opportunities that have the restriction "Orientation Required" as a requirement.

Form Configuration

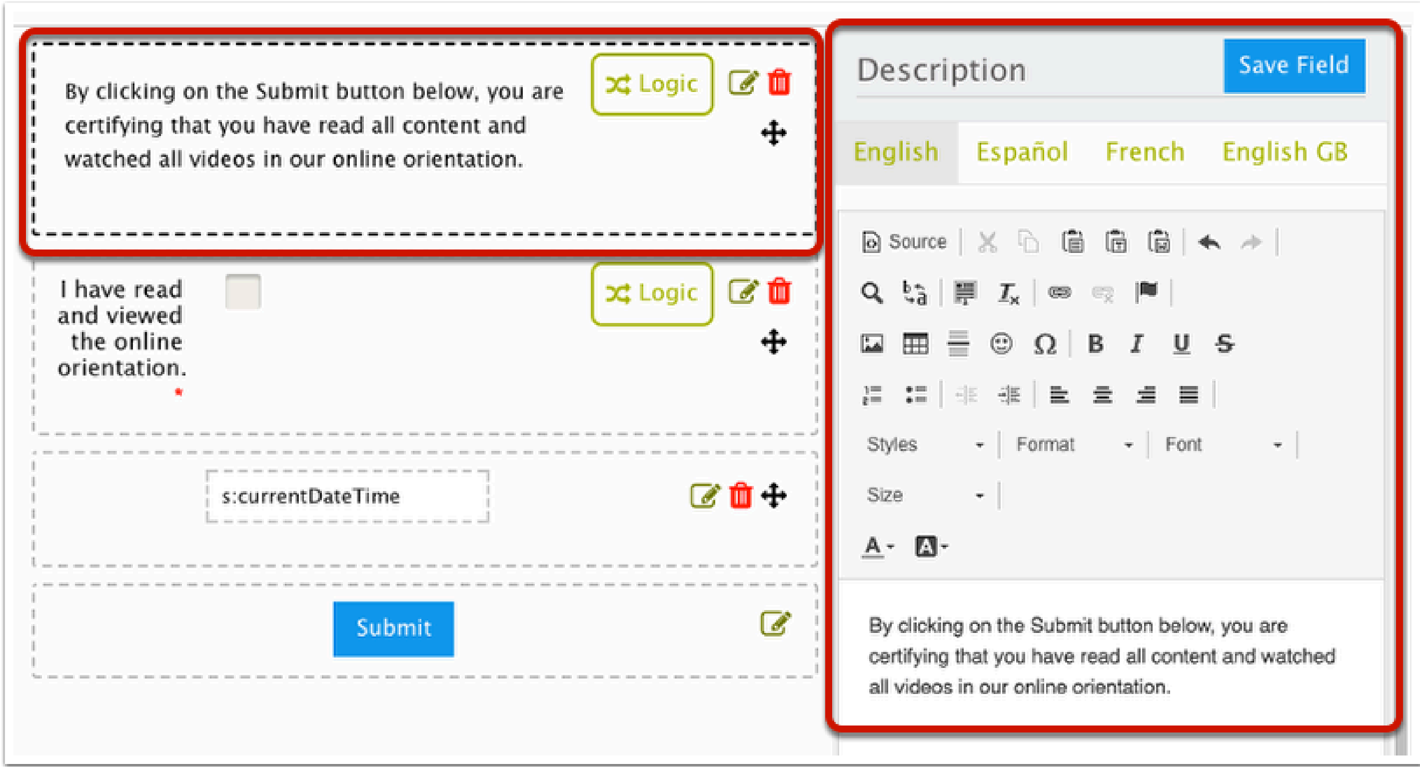
Give the form a name, set its configuration as shown here:



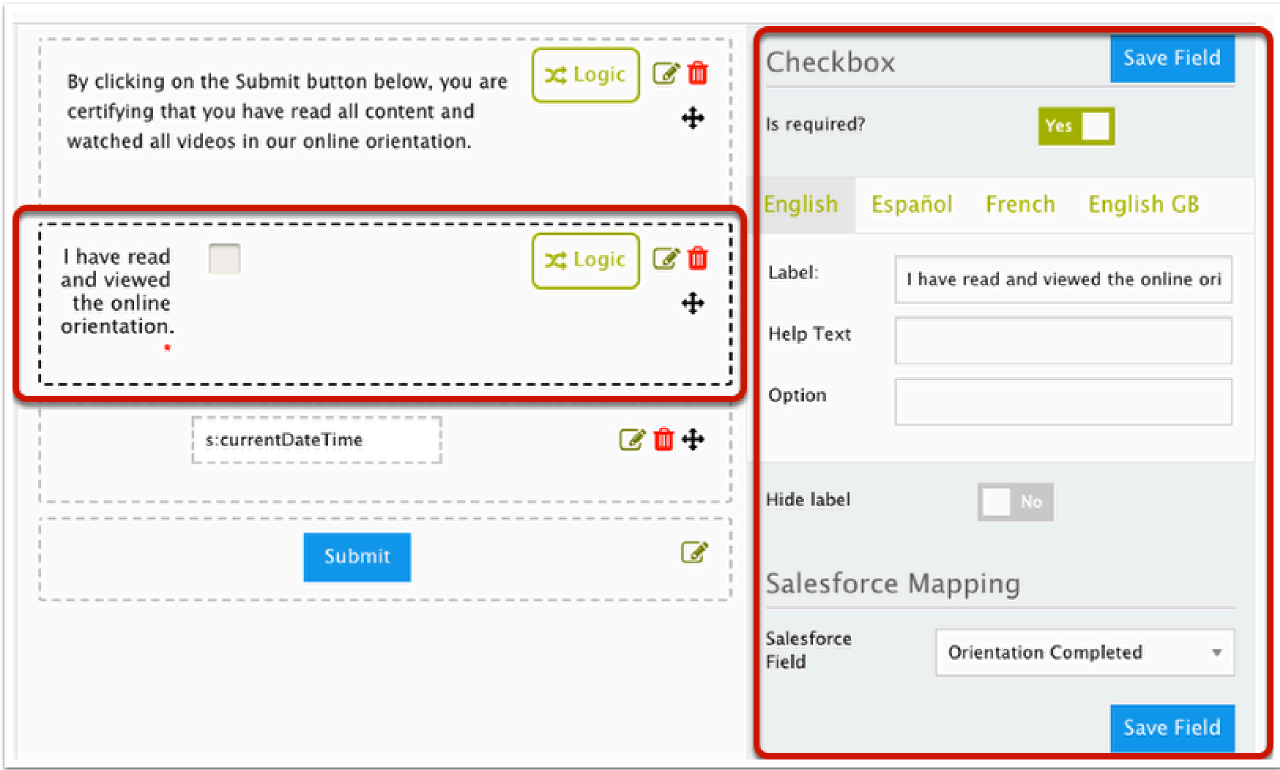
There will be four fields added to the form. Here are the field details

1. Description Field:

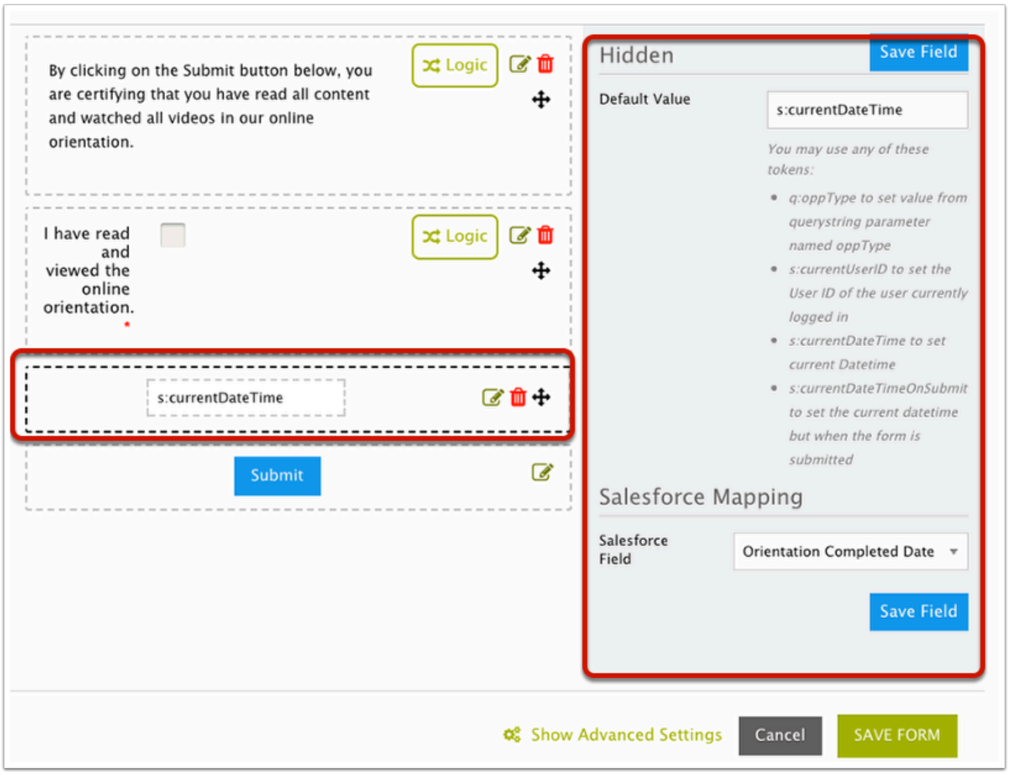
This is whatever description you want to have on the form about what they are agreeing to by submitting it.



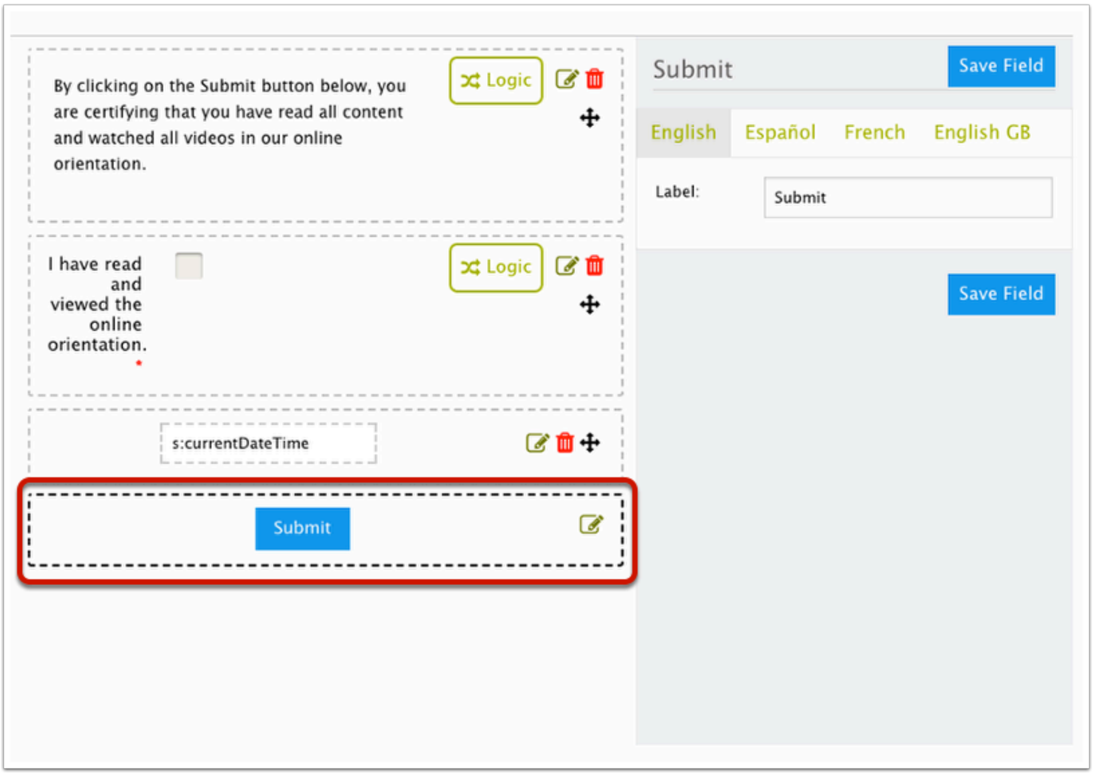
2. Checkbox Field: This field will be mapped to the Salesforce Form - Orientation Completed



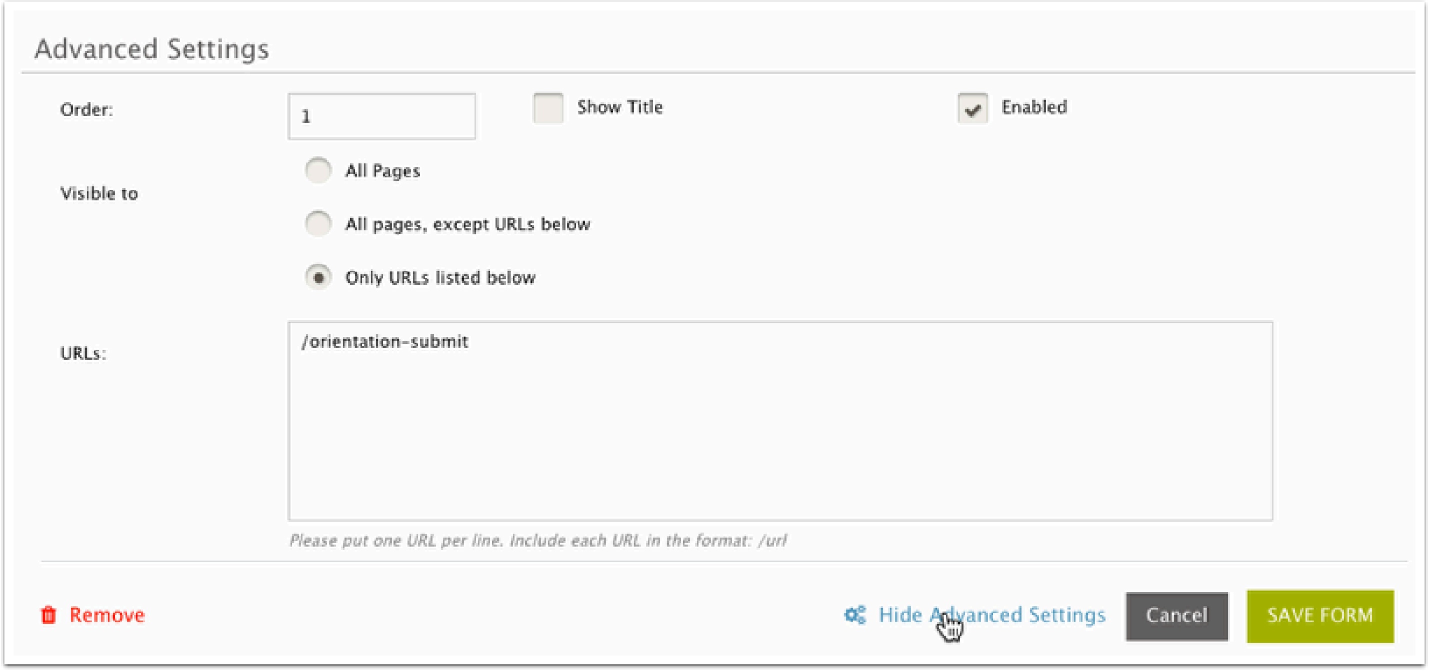
3. Hidden field - this field will not be visible in the form, but will use the token s:currentDateTime to determine the current time, and then will populate this value to the contact record field "Orientation Completed Date"



4. A submit button



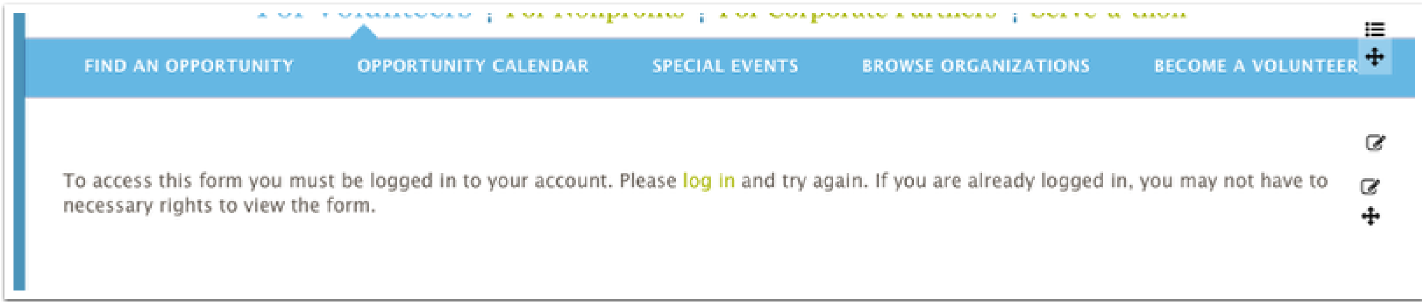
Advanced Option: Specify the page you wish the form to appear on.



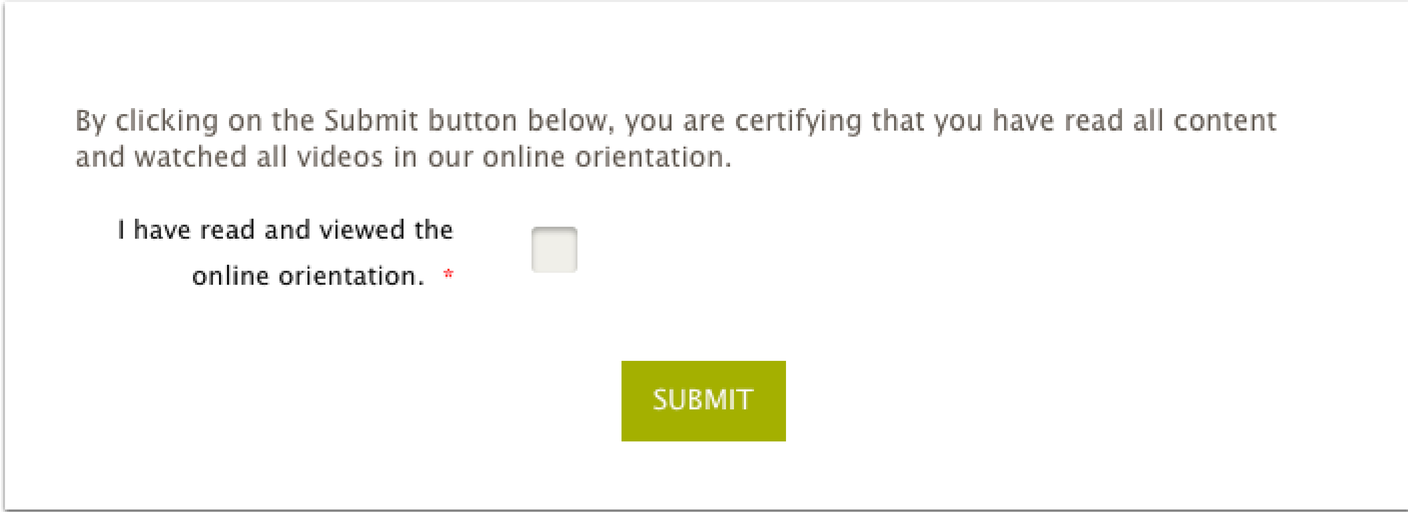
Click on Save Form and your form is ready to use!

How the Saved Form will appear on the page:

If you are not logged in the form will not be visible:



If you are logged in, you can use and submit the form.


By clicking on the Submit button below, you are certifying that you have read all content and watched all videos in our online orientation.
I have read and viewed the online orientation. *
SUBMIT

Form Builder - Using Picklists vs Radio Buttons

The HOC CMS Form Builder allows you to use specific field types to capture different types of data, such as text, numbers, emails, picklists, and files.

When using a single response picklist, the Form Builder offers two options: Picklist or Radio Buttons. Both allow you to display several options that a user can select one as a response.

It is important to understand that the picklist (or "select" as known in HTML) and the radio button behaviors are not equivalent. Select that one that best matches the user experience you want to provide, the data you want to capture, and any compliance you must meet (e.g., GDPR, Web Content Accessibility Guidelines).

The HOC Form Builder is designed to integrate with Salesforce. If you have used the Form Builder, you might have noticed that although the Form Builder does have radio buttons, Salesforce does not.

The simplest advice we can provide regarding if you should use a picklist or a radio button display is:

- When in doubt use a picklist.
- If your form is tightly tied to Salesforce, use a picklist.
- If the question does not require a response, you might want to use a picklist. Radio buttons do not support easily a "no response" response. By definition, a radio button has one option selected always. If the question is not marked as required, then by definition you may have three possible responses, which with radio buttons may be difficult to manage:
  - No response: the does explicitly select an option response
  - Explicit no response: the user selects an option you provide of "none", "n/a" or "prefer not to respond"
  - Selected response: the user selects one "actual" options

Compliance with GDPR

Radio buttons are not the best option since they are not friendly to allowing the user to opt-out from responding. If you need to comply with GDPR, we recommend:

1. Use a picklist
2. Use radio buttons with a "none" option and make it the default (in Salesforce if option values are coming from Salesforce)

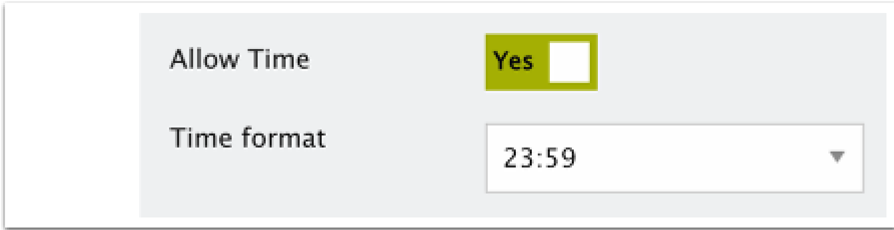
Form Validations for Dates

When adding a date or date/time field to a HOC form, you have a variety of validation options available

When adding a date or date/time field to a HOC form (standalone or as part of the ARS), you now have additional validation options for the dates that can be entered into the form:

1. Allow Time (select Yes if you wish both a date and time to be supplied)

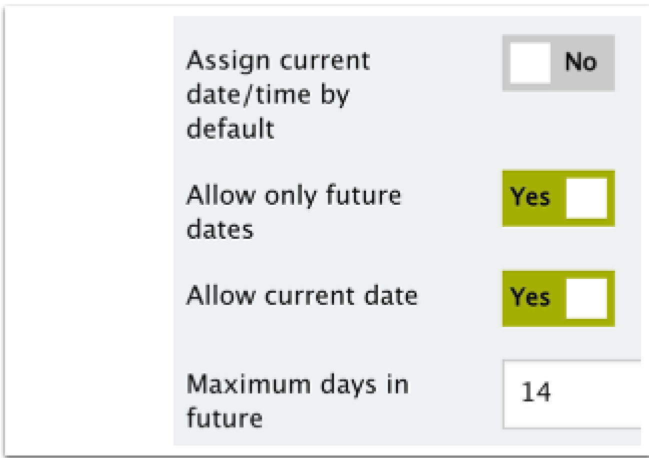
• You can choose the format you wish the time to be entered in if you select 'yes



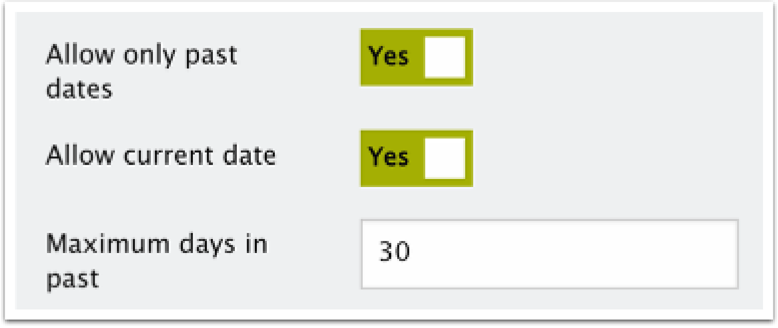
2. Assign Current date/time by default   (will pre-enter today's date in the form). Can be edited by the user if they don't wish to use today's date.

3. Allow only Future Dates.   When selected, you also have the option of allowing the current date as well

You can also set a limit to the maximum days in the future that can be entered.

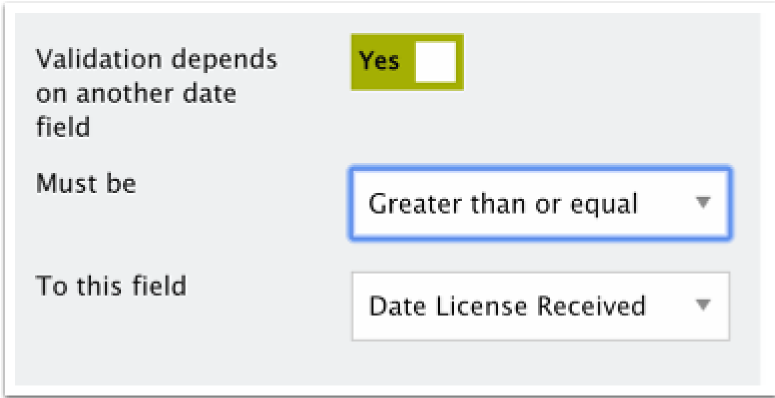


4. Allow only past dates.   This offers the same options when selected....



5. Validation depends on another date field

You can make a date field in the form dependent on the answer given to another date field in the form. If enabled, you select a logical operator (i.e. greater than, less than or equal), and which field it is dependent on:



These validation options give you greater control over what dates can be entered into a form you create, and allow for much more robust forms that use dates.

Uploading Files via Forms

You can use forms to allow a user to upload images and/or documents. These can optionally be uploaded directly into Salesforce and associated either with Salesforce Libraries or Specific Records in Salesforce.   On the public site, a logged in user will be able to upload one or more files at a time.

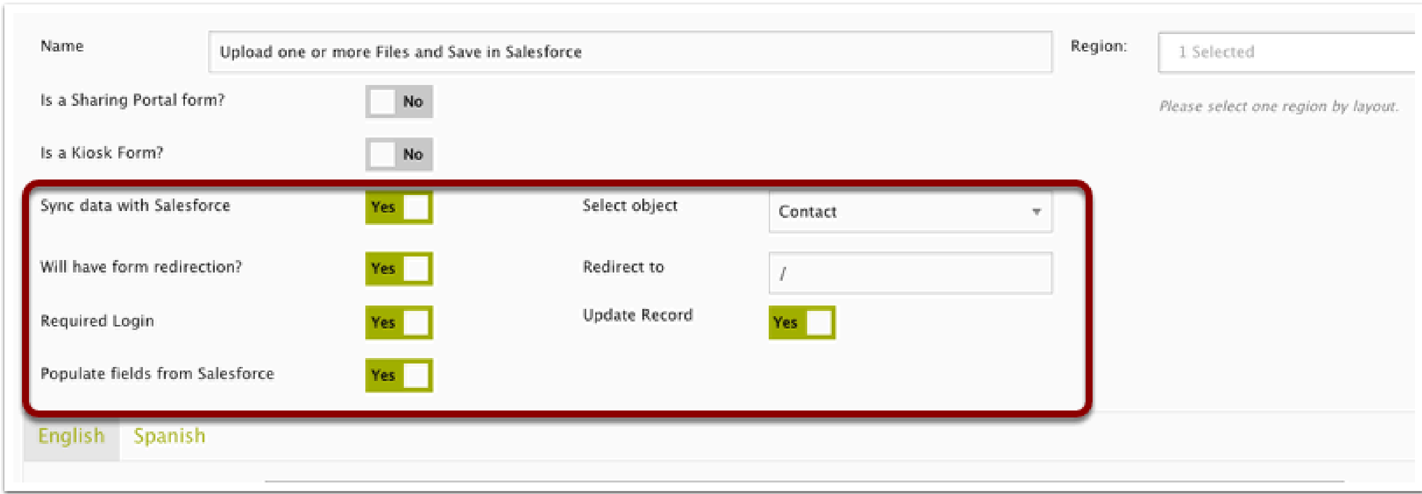
If you've synched the uploaded files to Salesforce, the user will have future access to the files through this form, should they wish to delete or update a file they've uploaded.

If you do not synch the files directly to Salesforce, they will be available via links in the CMS via AddOns / Export Form Data - and the volunteers will not have access to the files they've uploaded.

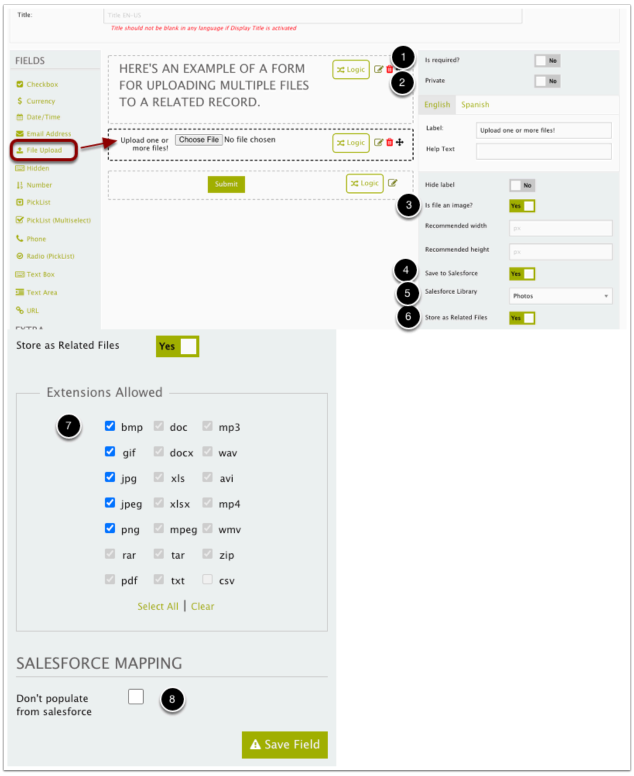
How to configure a form to be saved in Salesforce

To save a file in relation to a contact, you must select "Required Login".   Choose the object you wish to associate the file with. In this scenario I want the uploaded files to be related to the contact record, so we'll choose contact.   (You could however use ARS and associate a file with a connection, or with any other object)

Choose populate fields from Salesforce is you want the user to be able to access the files that they've uploaded.



Drag the File Upload field onto the form layout and configure it:



1) Determines is uploading the file is required.

2) **Private:** Don't set to private unless you want only user and CMS Admin to be able to access the file. It will not be visible in Salesforce if synched. This cannot be reversed if files were previously uploaded as private, so not set to Private without fully considering your need to access these files.

3) **Is File an Image?** This is optional, but allows you specify a recommended width and recommended height for the image. This value is not enforced however.

4) **Save to Salesforce:** Select this if you wish the file saved to Salesforce

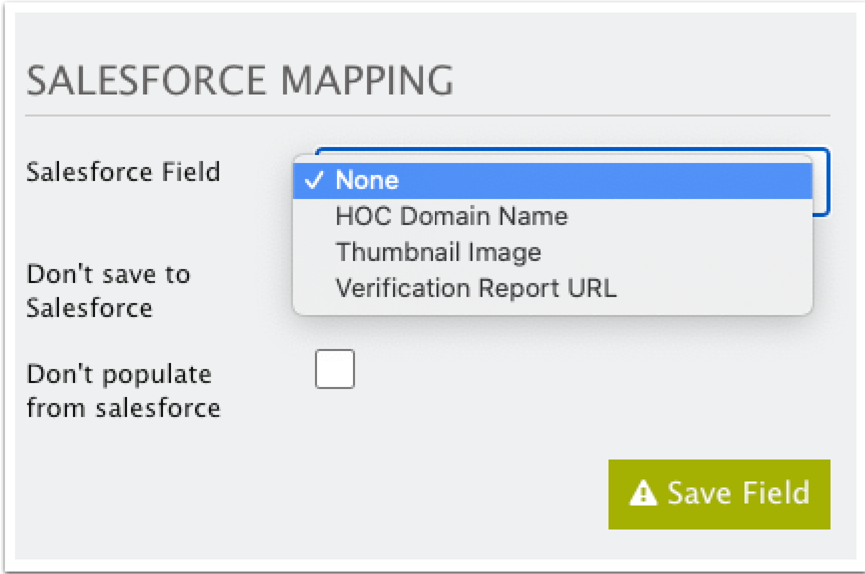
5) **Salesforce Library -** Salesforce can optionally save files in a library. You do not have to choose a library or create one, in which case it will be put in the default Salesforce Library. If you wish to create specific libraries for certain types of file uploads you can do so. See this article from Salesforce Help on how to create and manage libraries.

6) **Store as Related Files:** Setting this to 'yes' will associate the file with the record you are creating or updating in Salesforce. In our example here, we are synching to the contact record (of the logged in user), so the file will be available as a related file to the logged in contact.

7) **Extensions Allowed:** specify all the file types you are allowing to be uploaded. You must select at least one to save the field and the form. (Otherwise they can't upload anything!). This allows you to limit uploads to documents, images, or whatever is appropriate. (if Is file an Image is selected, you can only choose extensions for images).

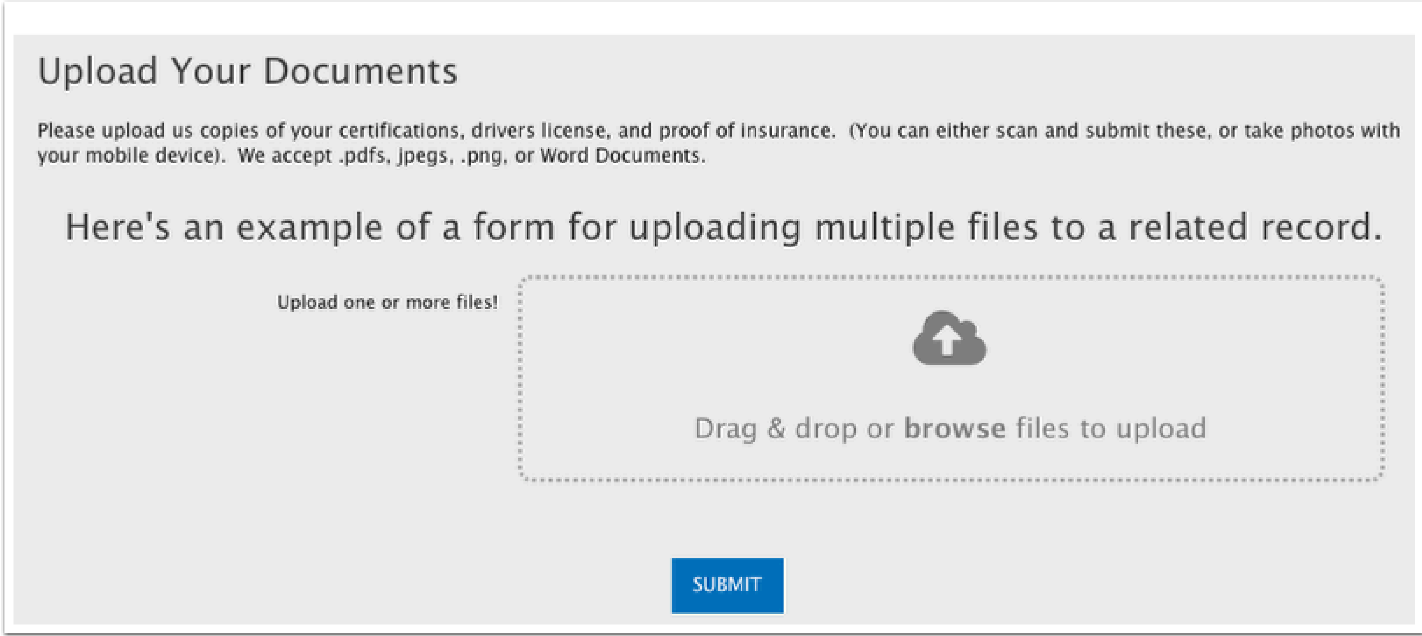
8) **Don't populate from Salesforce:** When checked the files associated with this contact will not be visible for the user to delete or edit.

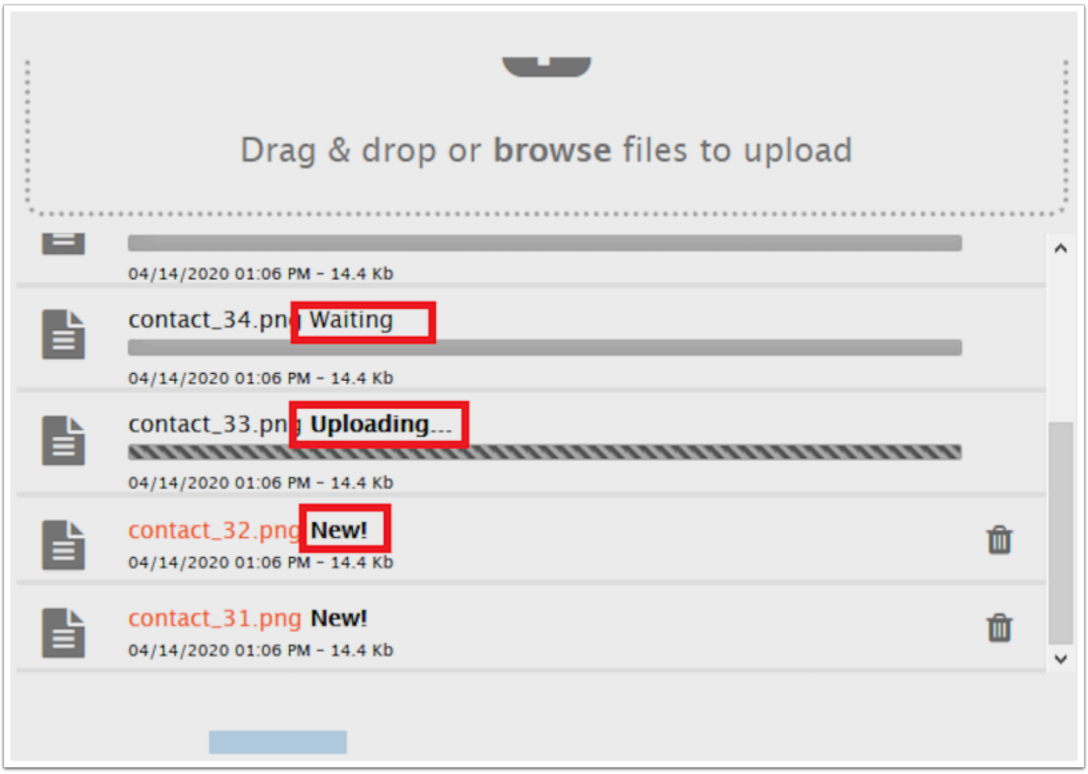
NOTE: If you do not choose to map the file to a library or as a related file to a record, you'll be presented with the option to map a URL to the file to a chosen URL field in Salesforce on the record you are updating. In this case, the file will be stored externally from Salesforce, and you can access it through the URL populated in this field.



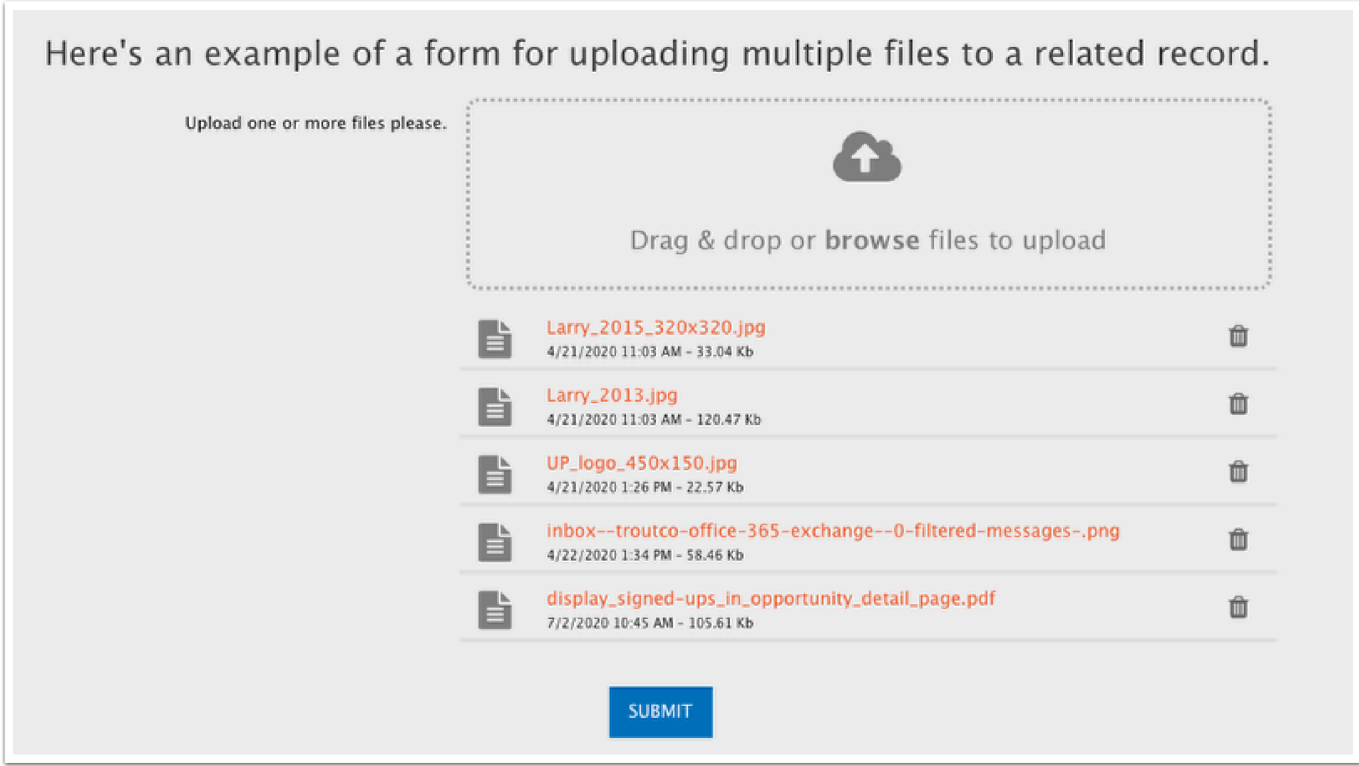
How Uploading Files works on a form on the public site.

Create a page for your form, and put in any helpful instructions. Users can drag & drop or browse files to upload, and can upload multiple files at once. After all files are uploaded, they would click Submit to finish the form and the files will be submitted.





Subsequently - a logged in user will have access to the files they've uploaded (if you've selected "Populate Fields from Salesforce".


Here's an example of a form for uploading multiple files to a related record.
Upload one or more files please.
Drag & drop or browse files to upload
Larry_2015_320x320.jpg
4/21/2020 11:03 AM - 33.04 Kb
Larry_2013.jpg
4/21/2020 11:03 AM - 120.47 Kb
UP_logo_450x150.jpg
4/21/2020 1:26 PM - 22.57 Kb
inbox--troutco-office-365-exchange--0-filtered-messages-.png
4/22/2020 1:34 PM - 58.46 Kb
display_signed-ups_in_opportunity_detail_page.pdf
7/2/2020 10:45 AM - 105.61 Kb
SUBMIT

Creating a form to update a specific record

One of the great powers of forms is their ability to specify a specific existing record to update. Contacts are easy to update, because any form that requires a login automatically knows the ID of the contact filling out the form.

But its also possible to have forms update a specific record of ANY object, by including a record ID in the URL that will open the form.

To show how this can be done, let's create a form (and an email) that will allow a user to click on a link to a form, and update a specific volunteer opportunity: In this example, we're going to be sending out an automated email to an Opportunity Coordinators asking them to respond to a survey related to one of their volunteer opportunities. Here's how we get the form to update the correct Volunteer Opportunity.

1) Add the fields you wish to update to the object you will be updating.

In this case, we're adding a few 'survey' fields to the Volunteer Opportunity Record. We'll map these to the form we're creating. We then create a form to update the Volunteer Opportunity object, and add fields to the form, mapped to the info we want to get updated when the respond to the survey request.

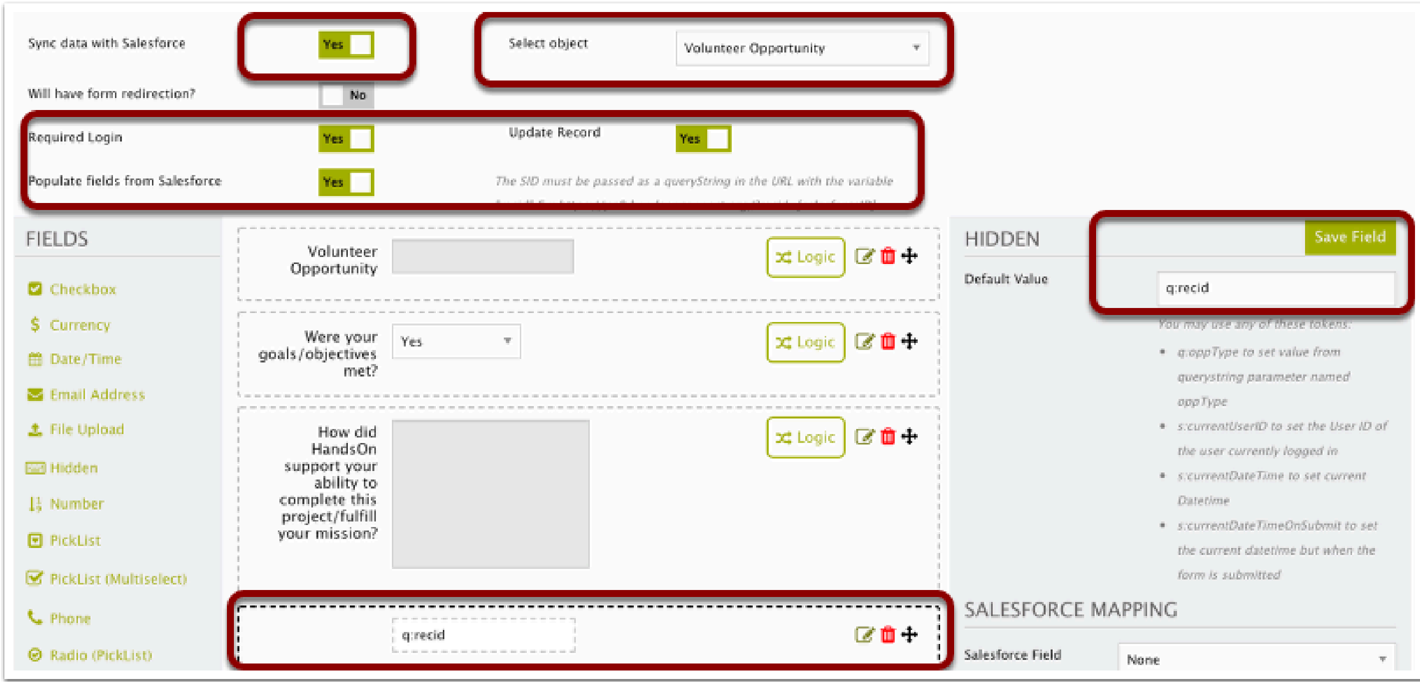
Be sure the form is set to sync data with Salesforce to the appropriate object, requires a login, and will update records.

If you want the name of the Volunteer Opportunity to show up in the record (for informational purposes), you can add a text field, mapped to "Volunteer Opportunity name" and set it as a 'read only' field. (Mark this field as 'do not save to Salesforce" because you don't want the form to update the name that's already there. We're just using the 'read only' function in the form field to display some existing information about the record.

2) At the bottom of the form Add a hidden field that will capture the ID of the record you wish to update

In order to map the answers to the correct Volunteer Opportunity, we add a hidden field which will pick up the ID from the URL we'll be sending out in an email template.

The hidden field should have a default value of : **q:recid** (This means to bring in the ID portion of the URL that opens the form).

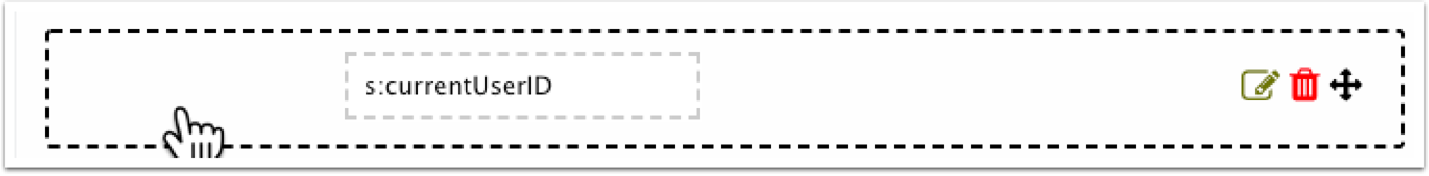


Another good practice, but not required, is to also capture the ID of the contact that was logged in to complete the form. (You don't have to map this to SF, but it will be captured and available via 'download form data' in the CMS if you ever wish to audit who actually submitted a form record on such and such date.

To do this, add a hidden field with the default value s:currentUserID

Other hidden field tokens you can use if desired are:

s:currentDateTime to set current Datetime or s:currentDateTimeOnSubmit to set the current datetime when the form is actually submitted.



Save your Form: and create a page to publish the form. You'll need the page URL for the email you'll be sending out:

3) Create an email template that includes a link (URL) to the form and contains the record ID in a way that the form will be able to use:

In this email template, we'll put whatever info we want and a URL that will take the user to the form, and put the record ID of the record we wish to have updated into the URL.   The merge fields in the email template should come from fields in the Volunteer Opportunity object (or whatever object your survey is going to update).   (Be sure to mention in the email that they will be required to be logged in in order to reach the linked form).

To construct the link to click on, your URL will include the following:

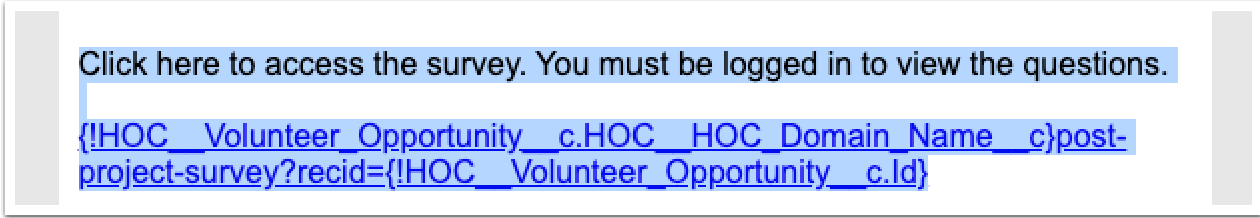
1. Get the merge field for the HOC_Domain_Name, for that record: In this case it's {!HOC__Volunteer_Opportunity__c.HOC__HOC_Domain_Name__c}

2. don't put in a slash (/) after this because the field HOC_Domain_Name includes the / in it.   This field is the URL that is associated with your public site: For example: https://ps9015.handsonconnect.org/

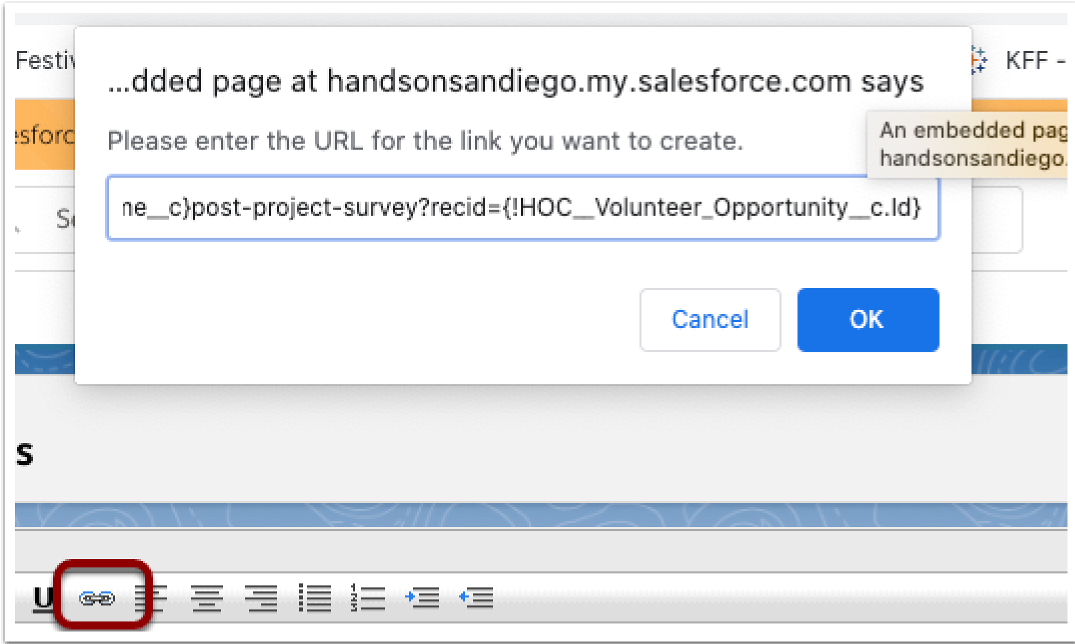
3. Now put in the relative URL of the page the survey will be on. In this case it's post-project-survey   (again, you don't need the / because its already in the HOC_Domain_Name which precedes it)

4. Now add ?recid=   and then the merge field for the object's ID.   In this case this would be ?recid={!HOC__Volunteer_Opportunity__c.Id}

Your finished field (along with text to tell people to click on the link will look something like this:



Select your entire merged URL, and then click on the hyperlink icon - and paste the full URL in. This will ensure that the link is clickable and won't be 'broken' because it spans multiple lines in the email.



Test your email template, by associating it with a specific Volunteer Opportunity record using the email templates "Send Test and Verify Merge Fields" functionality. Be sure to associate it with a specific Volunteer Opportunity when conducting your test.

Test the email that is sent by clicking on the link and ensuring it successfully opens the form, and updates the corresponding record as expected.

4. Create the Email Alert

Before you can send an email through Salesforce, you'll have to create an email alert that defines WHO to send the email to, and the "From" address. You'll associate the email alert with this template you've just created. IN this case, you'll probably want to send the email to the Opportunity Coordinator.

[See this article on how to create an email alert.](#)

5. Create a Workflow or Process Builder to send your email

You'll now create a workflow, or preferably these days, a "Process" which defines the criteria for sending the email, and when to execute your email alert.

If you're not familiar with creating processes using process builder, we recommend going through this [Trailhead lesson for the basics of building processes.]

Donation Forms

Before you can use Donation Forms

Donation Forms require that you have a Click & Pledge or PayPay account and integration configured. Note that Click & Pledge has more features and a tighter integration with Salesforce. The PayPal integration provides limited functionality.

Both Click & Pledge and PayPal are third-party applications and we do not provide direct support, training or maintenance for them.

Once you have a Click & Pledge or PayPay account, you must contact our support team to configure the integration with HandsOn Connect.

For Click & Pledge, we can also help with the integration with Salesforce and the Nonprofit Success Pack (NPSP), though there may be a fee.

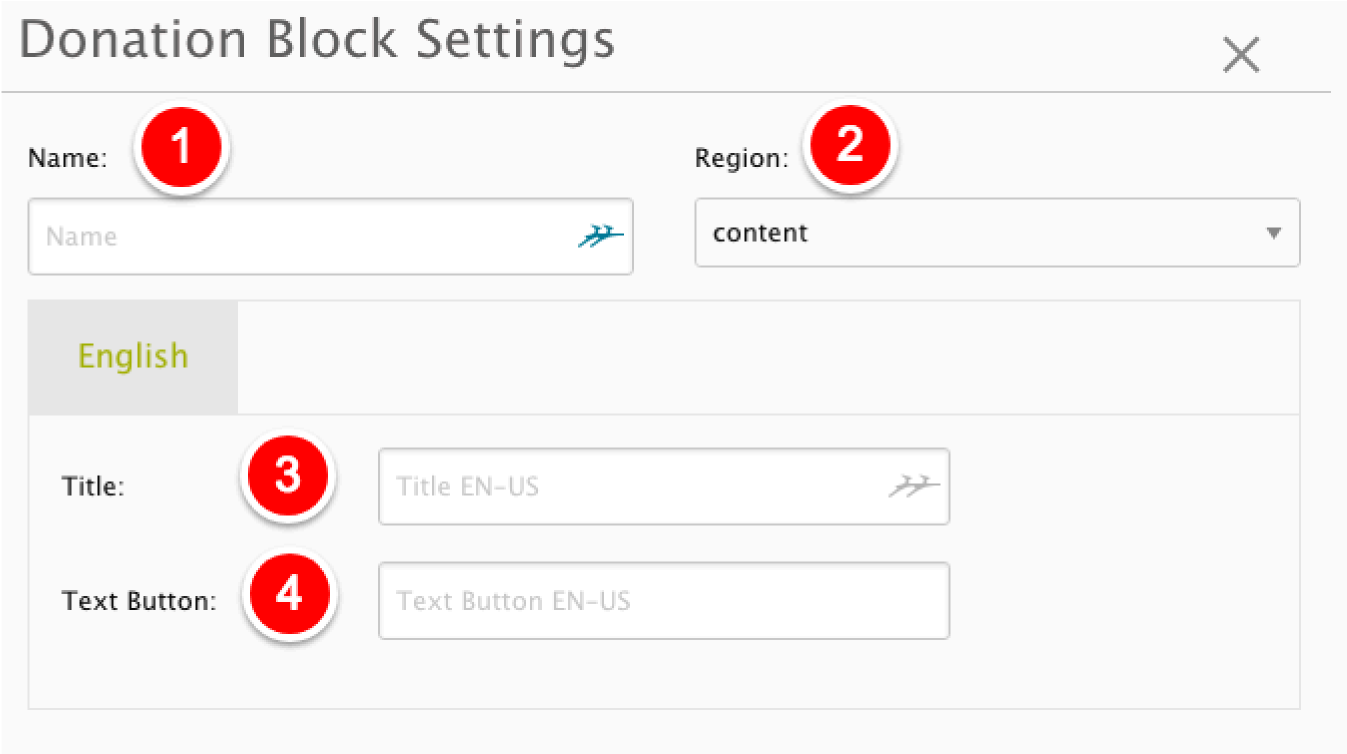
Lastly, Donation Forms are an Advanced CMS Feature. You should be comfortable using the CMS, and depending on the level of integration with Salesforce, you may need to know how Salesforce and NPSP work, as well as, the tools and features provided by Click & Pledge or PayPal.

Starting with Donation Forms

To create or edit a Donation Form, in the CMS go to **AddOn -> Custom Forms -> Donation**. We'll create a Donation Form as an example, so click on **Add Donation**.

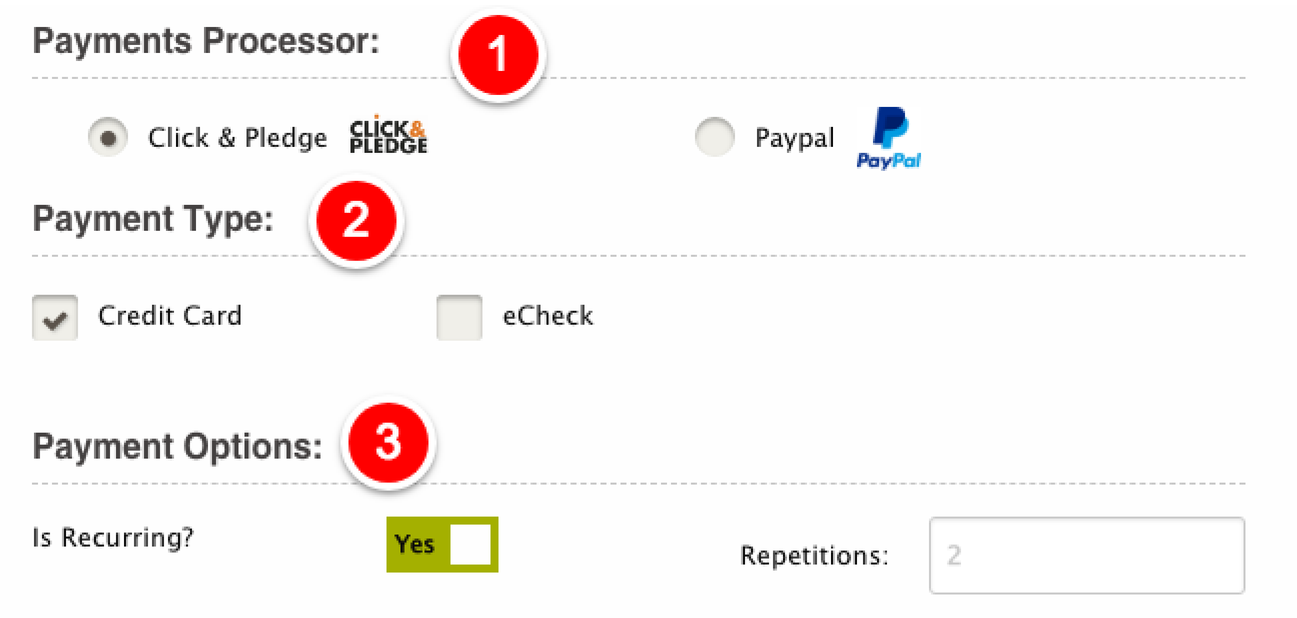
The first part of the form you will be familiar with since it similar to other CMS blocks:

1. Name of the form. Make it descriptive.
2. The region where you want the form they appear on the page layout
3. Title of the form (optional)
4. Text that will appear on the button to submit the donation



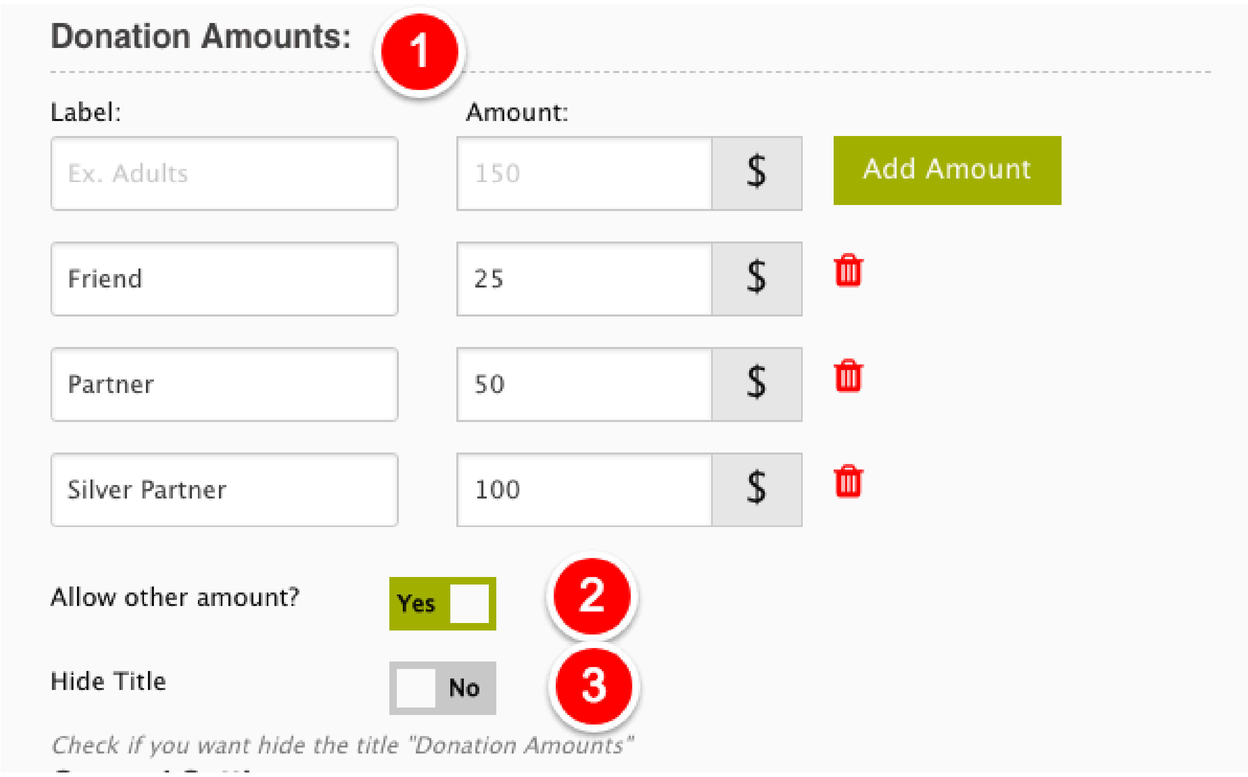
In the next section of the form you can configure:

1. **Payment Processor** that you are using (must be connected and configured)
2. **Payment Type** (your payment processor may not support all options)
3. **Payment Options**: Set if the payment should be recurring or not, and the number of payments (repetitions) (your payment processor may not support all options)

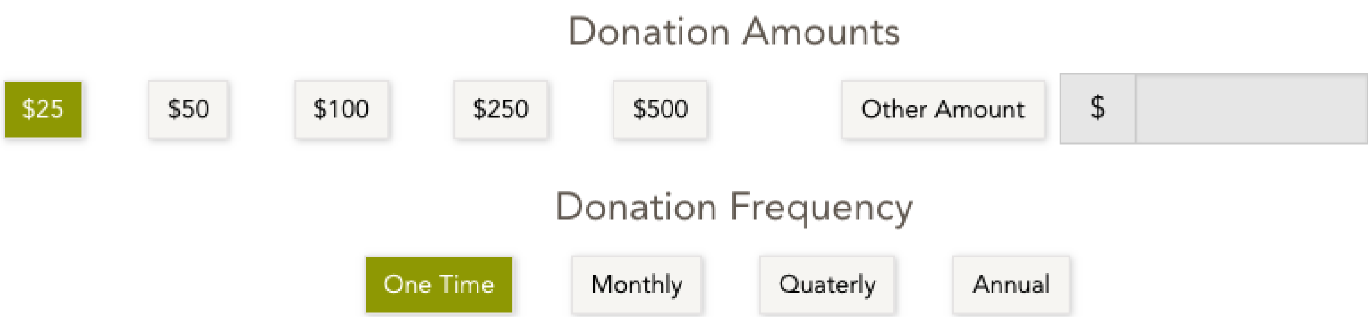


Now let's set up your **Donation Amounts**:

1. You can set up multiple donation amounts for the fixed or suggested currency amounts you wish to ask for. For each, you must include a label (e.g., Starter, Basic Level, Gold Member) and the currency amount.
2. If you want the user to be able to enter their own amount that they wish to donate, turn on this item.
3. Hide Title allows you to not display on the website the title "Donation Amounts" in this section of the form. This is useful if you are using this form to collect a different type of donation, such as a membership fee or selling t-shirts. (Note that Donation Forms are not a shopping cart system, but they can be used creatively to simulate a simple one.)

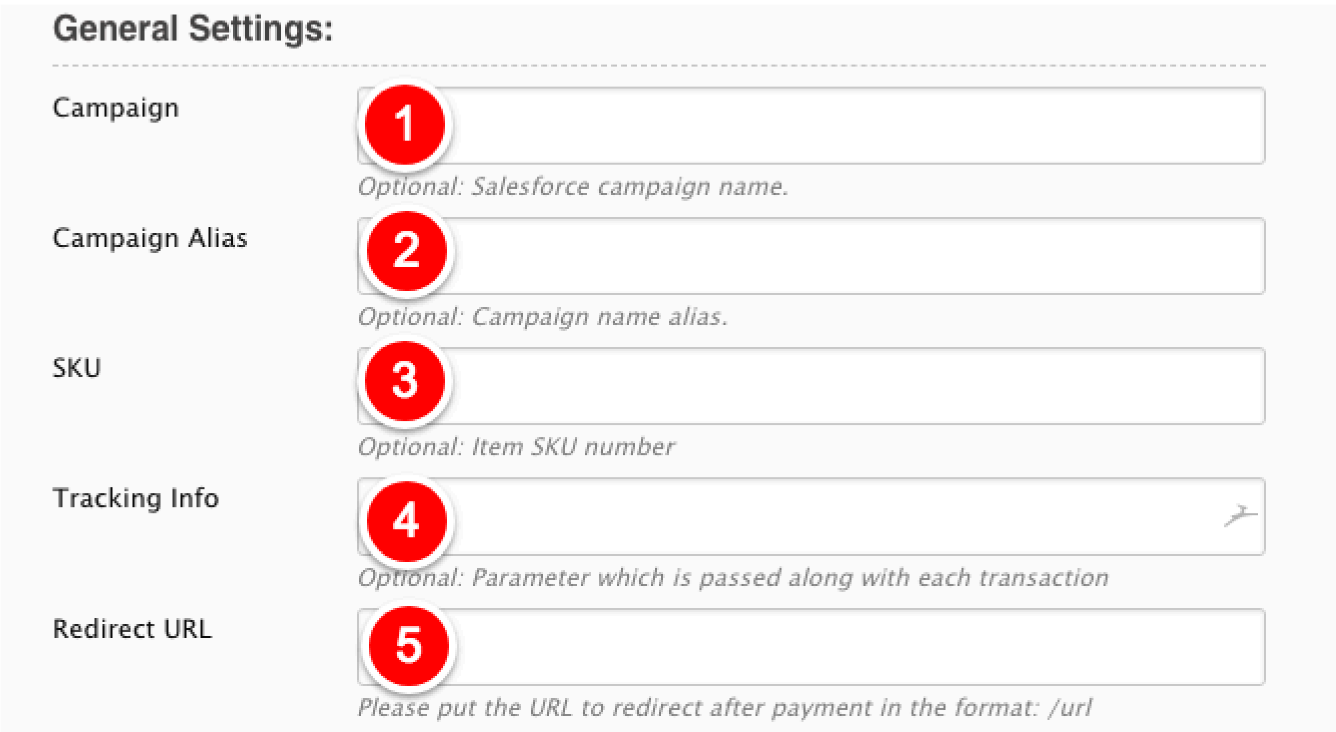


The Amounts and Recurrence settings may look something like this to the user:



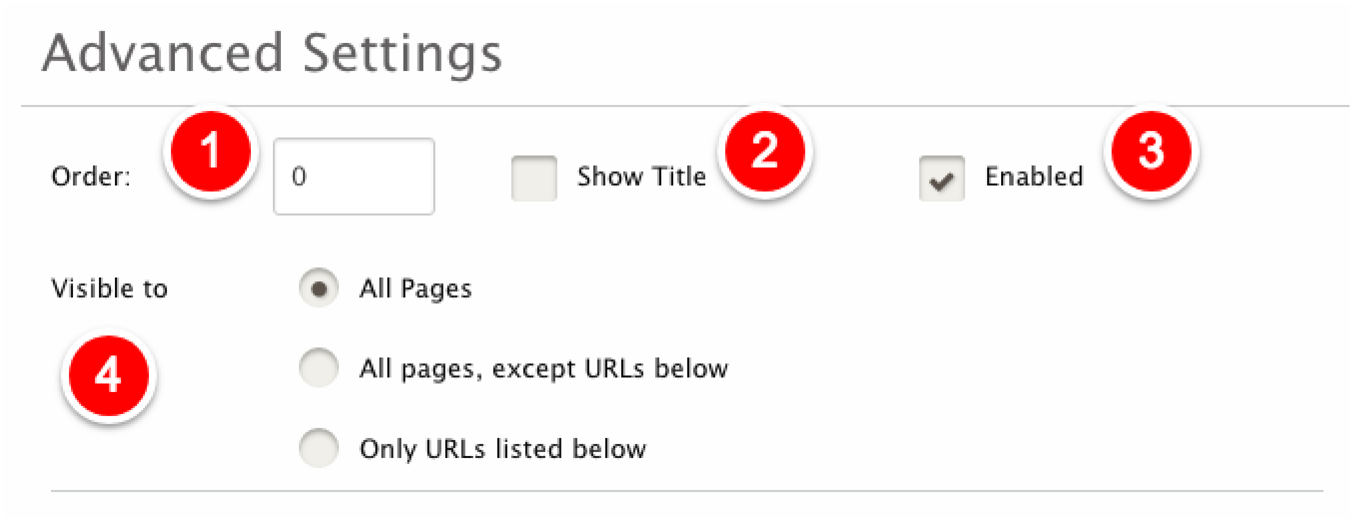
The next section, **General Settings**, includes optional settings which are used to integrate the Donation Form with Click & Pledge and Salesforce. You should be familiar with these items on these platforms to use them most effectively.

1. Campaign: Name of the Campaign in Salesforce to which you want to associate the donation to.
2. Campaign Alias: Click & Pledge takes advantage of Campaign Alias to minimize the amount of information needed for generating receipts. Through passing the Campaign Alias of a campaign page, various attributes of the Campaign page will be used when making the receipt.
3. SKU: A SKU (Stock-Keeping Unit) is a unique identifier for each item that can be purchased. Attaching SKUs to items allows organizations to track inventory easily and search for items based on an SKU. This will be helpful to organizations that have a large inventory of products, events, and donation types and need a streamlined way to manage them across multiple payment pages.
4. Tracking Info: Parameter that you can send to Salesforce for your own information
5. Redirect URL: Page you want to user to go to after they submit the donation (e.g., /donation-thank-you). Use the CMS Pages to create and provide content.



The last section, the **Advanced Settings**, you will also be familiar with from other CMS Blocks:

1. Sets the order of the form on the page relative to other blocks
2. Display Tile on website or not
3. Display the form on website or not
4. Where you want to display the form. Most common is "Only URLs listed below" where you would include the page URL (e.g., /donation-form)



Additional Notes

The Donation Form is the simplest piece of the donation process and the only one that is a HandsOn Connect component. When a user completes and submits a Donation Form, it the donation is handed off to Click & Pledge (or PayPal), then processed, and then sent to Salesforce.

For additional information and support related to Click & Pledge and Salesforce, please visit their websites.

Other uses of a Donation Form

Note that although there are creative ways to use the Donation Form, many times in combination with other modules or blocks, the support provided by the HOC team is only when used as a standard donation page.

Here are some "creative" uses of the Donation Form:

- If you have the Advanced Registration & Sign up Module, you can include a donation or payment form when a volunteer or partner creates an account. It provides a simple mechanism to request an activation or a membership fee.
- Create a very simple payment page to sell items (e.g., t-shirts, caps, project kits, event tickets) or services (e.g., consulting, membership, event registration)

Parental Consent

Parental Consent (unverified) Module

The Parental Consent (unverified) Module is part of the Advanced Registration & Sign-up Module (ARS), which is a paid add-on module licensed on an annual basis. If you are interested, please contact our support team for pricing and activation.

> Note: The Parental Consent (unverified) Module is being replaced as of October 1, 2020 by an improved functionality that will be available directly through the ARS. Anyone using the current Parental Consent Module will be able to continue using it, but it will no longer be available as an add-on to additional customers after that date, and no future updates will be done to the older module.

About the Parental Consent (unverified) Module

There are several ways to incorporate Parental Consent in your HOC instance, including using the **Unverified Parental Consent** module or add-on. This module adds a workflow to the Volunteer Registration where if a volunteer is under a set age (using the registration birthdate) the system:

1. Requests that the volunteer enter an email for their parent or legal guardian
2. When the volunteer completes their registration, the system:
    1. Let's them know that their account and ability to sign-up for a project is pending parental consent.
    2. Sends an email to the email address provided for the parent requesting approval of the volunteer's account. The email directs them to a webpage that allows them to approve or not the request.
    3. The parent approves (or not) the volunteer is sent an email informing them. If approved, the volunteer can now sign-up for an opportunity.

You can configure:

- The minimum age for parental consent
- The email copy that goes to the parent with the consent request
- The email copy that goes to the volunteer if they are approved or not

The Parental Consent module is part of the **Advanced Registration & Sign-up** (ARS) module, which is a paid add-on. It also requires that the birthdate is asked on the volunteer registration page.

You can also build your own parental consent process using the ARS, the Form Builder and/or Salesforce workflows and emails.

Note that we labeled this module as "unverified" parental consent because of the process itself does not require that the parent or legal guardian verify who they are and their relationship to the volunteer.

If you are looking to use this module for legal compliance, please make sure to consult with your legal counsel.

This consent module basically manages the online-registration for minor volunteers. When they register, their account is 'locked' so that they cannot sign up for opportunities until consent has been granted.

Once granted, their account is unlocked and they are able to sign up for opportunities, subject to the age requirements for each volunteer opportunity.

Sharing Portal Reports

Making Reports Accessible in the Sharing Portal

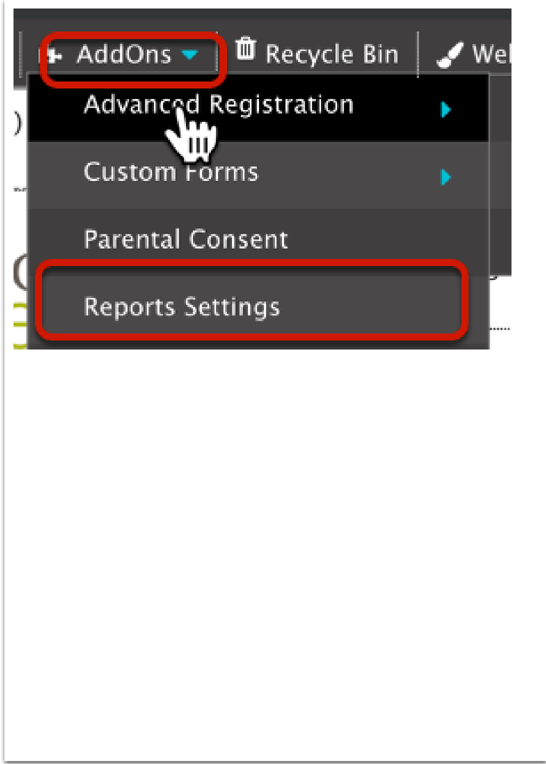
If you want to make reports available in the sharing portal, and there isn't a 'reporting' menu item in your sharing portal - you'll need to request to have Reporting Activated for your partner portal.

Just open a support ticket with the subject "Enable Reporting in Sharing Portal".
Be sure to indicate if you wish reports to be made accessible to Partner Staff, Volunteer Leaders, or both.

Once reporting has been enabled, you'll need to use the CMS to determine which folder(s) you want to make available to your partners and which folder(s) you want to make available to your Volunteer Leaders. Make sure to create at least one sharing portal compatible report (see below) to put in the folders you make accessible. This article will show you how to do this!

Reporting appears in the AddOns Menu in the CMS

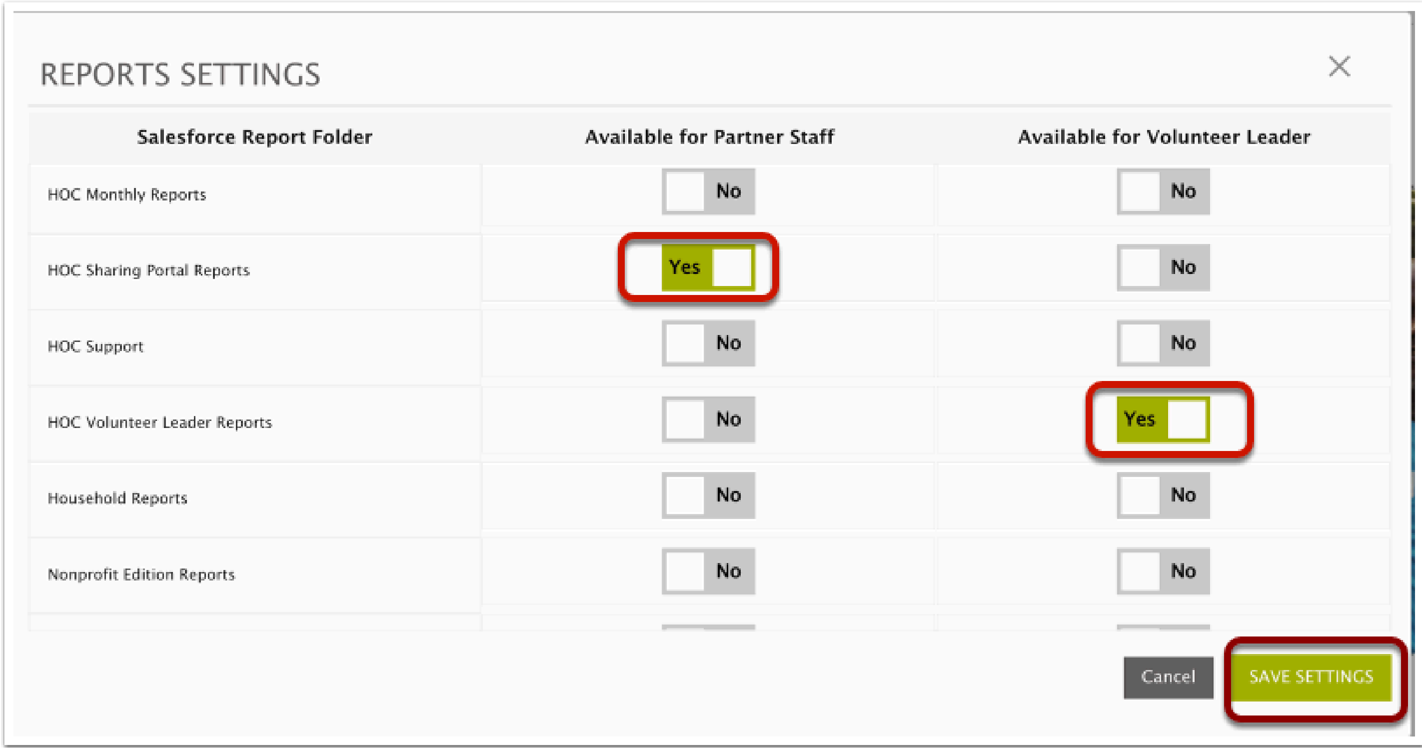
Once reporting has been enabled for your sharing portal, you'll see a new item in the AddOns menu of your CMS: "Reports Settings", Select this menu item to define which report folder(s) you want to make accessible to your partners.



Select Report Folder(s) for Partners and for Volunteer Leaders

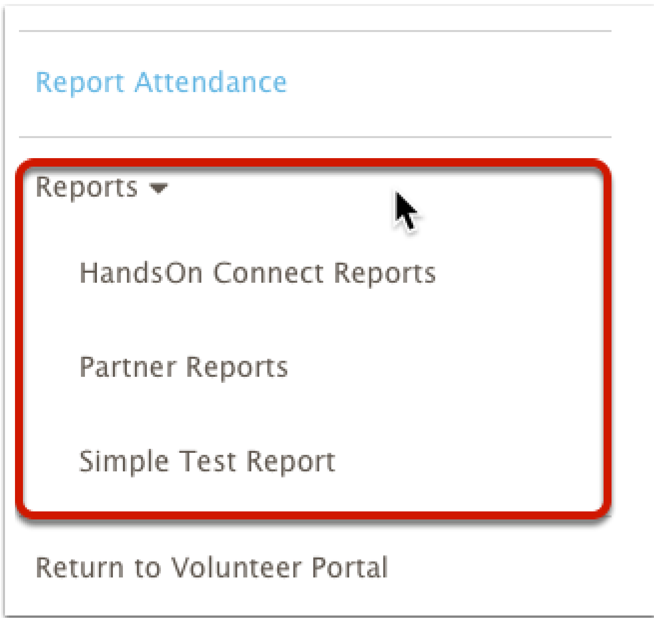
Select "Yes" for the folder(s) you wish to make available for partner staff. Select "Yes" for the folders you wish to make available for Volunteer Leaders. (You'll have to create the folders and reports you wish to share). It's up to you if you wish to give different folders and reports to Volunteer leaders than you make available to Partner Staff.

Then click Save Settings to Save your choice.



Partners and Volunteer Leaders will see this in their sharing portal

The folder or folders you have designated to show up, will show up in the left menu. Partners will only see the folders designated for partners -=- Volunteer Leaders will only see the folders designated for VLs.



Typically you'll want to place all your partner reports in one folder (its easier that way). So pick one folder for your reports.

Make sure that there are no reports in this folder that you do not want to make accessible to partners.

Partners will only see data in the report that is shared with their organization. They will not see all the data you see in the back end of the site when you view the report.

What reports can be shared to partners

Not every report you can create in Salesforce can be shared in the partner portal. Here's the requirements for a report that will run in the sharing portal:

The report must contain at least one of these objects:

- Volunteer Opportunity
- Occurrence
- Connection

Don't use a custom report type that doesn't include a field indicating who the opportunity's managing organization is, or a lookup to the Volunteer Opportunity. The best report types to use are ones with report types starting with the letter "HOC". (These are unmanaged reports and you can add additional fields to them if desired.

Note: The custom report type "Contacts and Connections" will NOT work in the partner portal, because it does not contain the necessary field to lookup the volunteer opportunity from the Connection Record."

All records in the report must include one of these objects:

- A report on contacts with or without connections won't run, because it can't display contacts that do not have connections
- A report on Contacts WITH connections however, will run fine.

Report Type should be either Tabular or Summary

- Matrix Reports are possible but can be awkward to view in the portal, use sparingly and preview them to see if this is the best way to present information.
- Tabular Reports will support filtering of the report data
- Summary and Matrix Reports will group data as it does in Salesforce but data cannot be filtered witin the report itself.

Reports can be exported by the partner as .csv or excel files.

Tips for making reports clear and useful for your partners.:

- Make sure a report you create Is compatible and runs successfully in the sharing portal (don't assume that your existing reports from 2.0 are good. Audit your reports and make sure they produce meaningful results for your partners.
- Make sure each report has a 'description' so partners know what the reports will do for them.
- Don't bog partners down with too many reports. Give them a short list of reports that bring value to them.
- Remove record IDs from your partner shared reports -- the ID fields won't mean much to your partners (since they are not actually working in Salesforce -- and reports in the sharing portal do not have hyperlinks. So an occurrence ID like OC-13543 is pretty useless information and shouldn't be included in your partner reports.
- Don't enable reporting in your partner portal until you have created one or more reports that are needed and useful to your partners. Some organizations have no need for partners to have reports - so don't just turn it on for the sake of having it. Determine the reporting needs first!

What reports can be shared to Volunteer Leaders

What records a Volunteer Leader should be able to see are different than those a partner would see. Volunteer Leaders only see records associated with an occurrence where they have a connection where they are designated with the role 'Volunteer Leader".

Every record in the report must contain a connection:

It can also include Volunteer Opportunities, Occurrences or anything else related to connections - as long as all the data returned includes a connection.

- do not use a report type that says 'with or without connections"

Report Type should be either Tabular or Summary

•Matrix Reports are possible but can be awkward to view in the portal, use sparingly and preview them to see if this is the best way to present information.

•Tabular Reports will support filtering of the report data

•Summary and Matrix Reports will group data as it does in Salesforce but data cannot be filtered witin the report itself.

Reports can be exported by the Volunteer Leader as .csv or excel files.

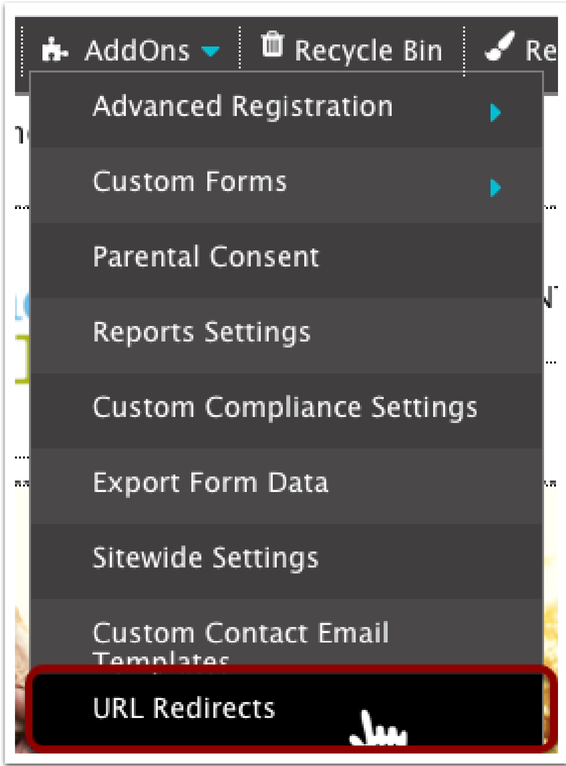
URL Redirects (Friendly URLs)

URL Redirects (Friendly URLs)

URL Redirects make it possible to use a friendly URL (such as a relative URL like /knitting to automatically go to a more complex and hard to remember URL like https://hoc9015.my.salesforce.com/sfc/p/1N000001BS6x/a/3m000000Vr5i/A3OOjTEWowfqMphZxjMw7Imy55szFUI1ie6mcWfF_W0

Here's how to create a URL redirect in the CMS:

Select URL Redirects from the AddOns menu



Click on Create New URL

Put in the details of your redirect:

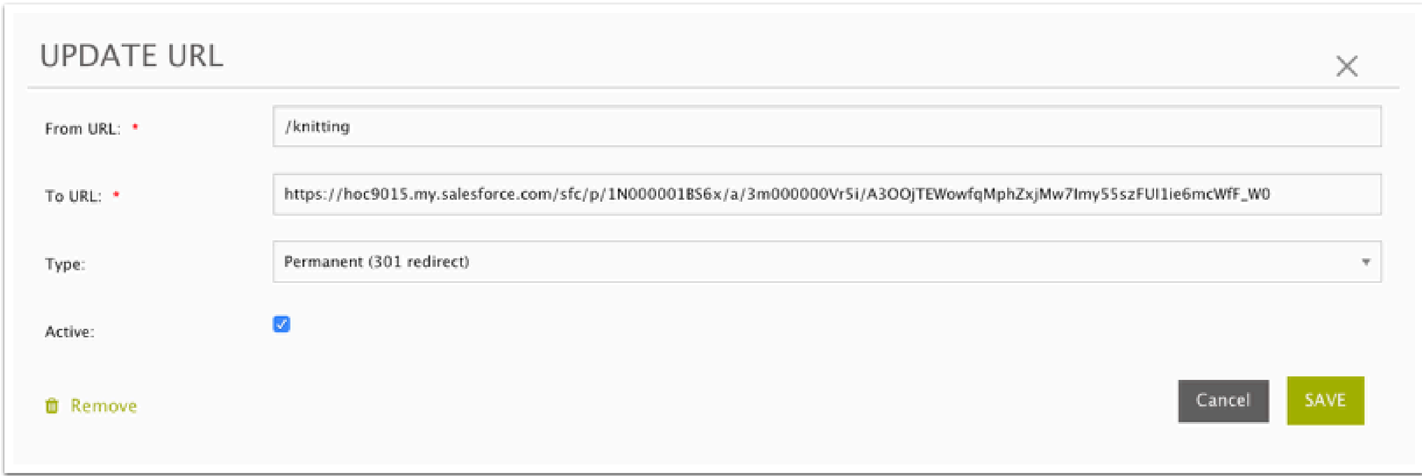
From Url: the friendly URL you wish to create. It should be a relative URL since it will be only work when someone is on your HandsOn Connect site. (A relative URL is one where you don't have to put in the https://volunteer.troutco.com if that's your site URL.

To URL: This is the URL you wish to redirect to. If the URL is on your public site or sharing portal, just use a relative URL. If the URL is to an external site outside your CMS., then put the full URL including https:// (For example if you were putting in the URL of a file coming from your Salesforce instance, or another website outside your CMS).

Type: Choose either Permanent (301 Redirect) or Temporary (302 Redirect).
These determine how search engines handle this. Use Permanent if this will always be in place. Use Temporary if you only plan to redirect for a while and eventually want the original URL to be accessed and no longer redirected.

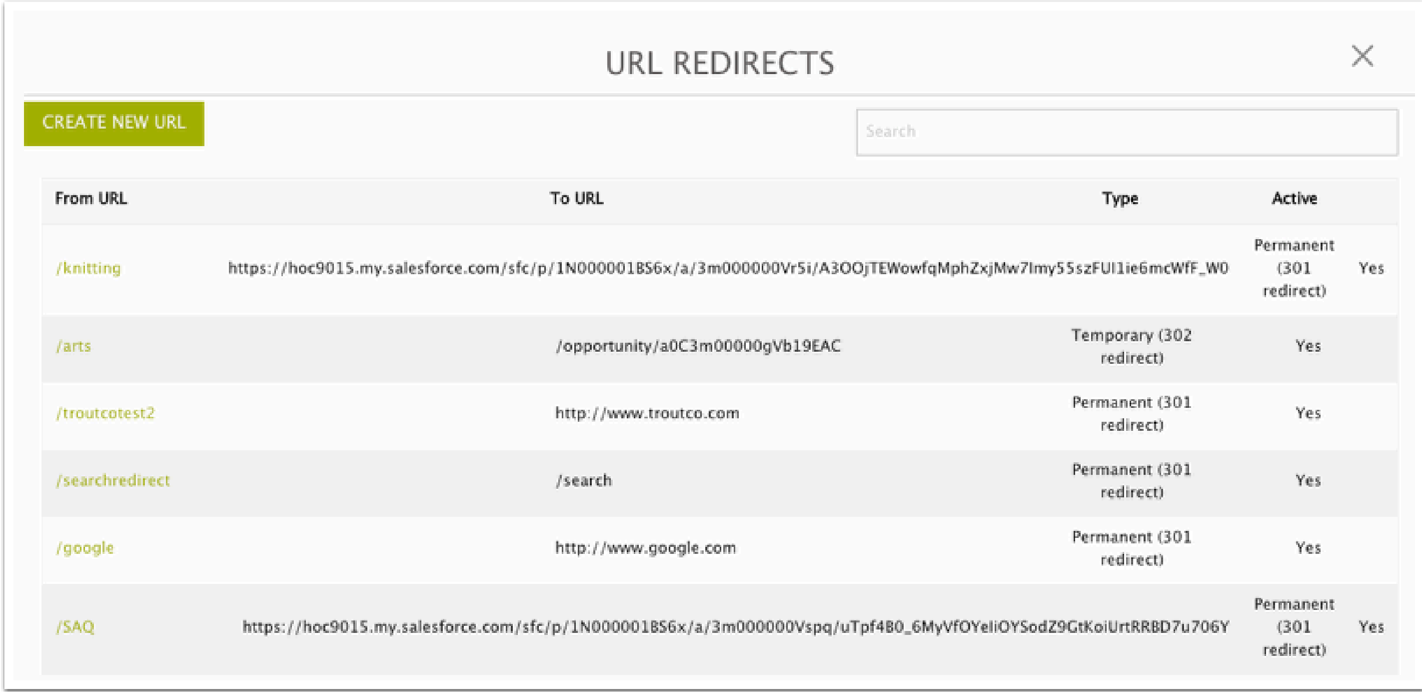
Active: Check this box to make the URL live and active. Uncheck to stop redirection.

Click SAVE when finished.



The From URL does NOT have to be an existing page on your site. You can choose anything you like as your friendly (from) URL. It can however be an existing page in the CMS that you no longer wish people to access.

A List of all your URL redirects will be shown, and can be searched



From URL	To URL	Type	Active
/knitting	https://hoc9015.my.salesforce.com/sfc/p/1N000001BS6x/a/3m000000Vr5i/A3OOjTEWowfqMphZxjMw7Imy55szFUl1ie6mcWfF_W0	Permanent (301 redirect)	Yes
/arts	/opportunity/a0C3m00000gVb19EAC	Temporary (302 redirect)	Yes
/troutcotest2	http://www.troutco.com	Permanent (301 redirect)	Yes
/searchredirect	/search	Permanent (301 redirect)	Yes
/google	http://www.google.com	Permanent (301 redirect)	Yes
/SAQ	https://hoc9015.my.salesforce.com/sfc/p/1N000001BS6x/a/3m000000Vspq/uTpf4B0_6MyVfOYeliOYSodZ9GtKoiUrtRRBD7u706Y	Permanent (301 redirect)	Yes

Other CMS Topics

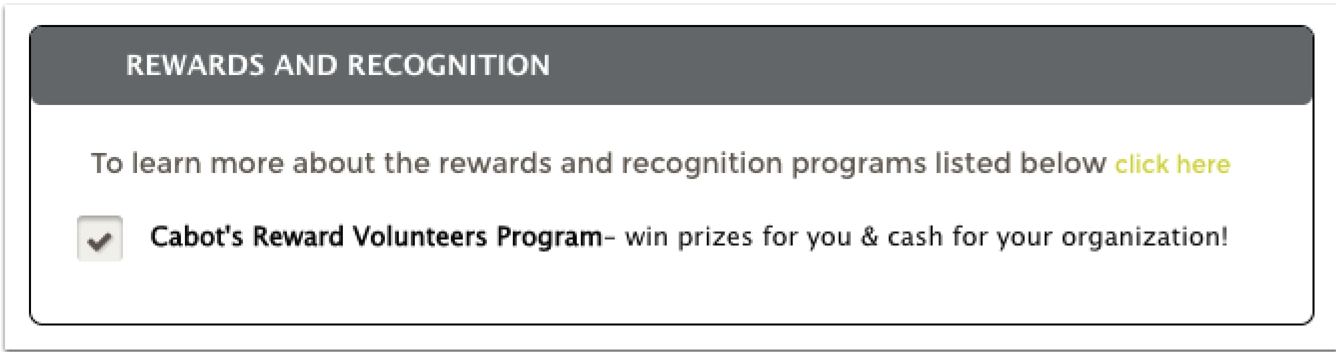
Enabling Cabot's Reward Volunteer Program and Resources

HandsOn Connect is excited to be partnering with Cabot Creamery to make it easy for your volunteers to opt-in for the Reward Volunteers Program to earn prizes and CASH for your organization!

Overview

HandsOn Connect securely shares a contact's volunteer history when they **opt-in** to the Cabot's Reward Volunteers program either through the volunteer registration or the personal information page.

The information shared with Cabot's Reward Program is the contact's name and email address and the Volunteer Opportunity Name, Organization Served, Connection Date & Time, Hours Served, Status and Attendance Status. If you are a volunteer center, your organization is also shared as the source of the contact cause you would also be eligible for cash prizes as well as the partner organization that was served.



How to Enable Cabot's Volunteer Rewards Program

Enabling the functionality is really easy and takes less than 5 minutes!

1. Go to your CMS
2. Navigate to Blocks -> System Forms -> Volunteer Form
3. Click on the edit for the form
4. Scroll to the Rewards and Recognition Section and toggle the Cabot's Reward Volunteer Program to "**Yes**" for Visible

5. Click Save

   Repeat for the Personal Information form.

   It's that easy! Here's a video of these steps as well (no audio)

New Rewards Page

As part of this new feature we have added a Reward and Recognition page (.../rewards) to your CMS. This page provides volunteers information about the Cabot's Reward Volunteers program (and hopefully new programs will be added soon).

You are able to edit this page to add your own messaging, but we encourage you to not remove the description, logo and links provided by Cabot's so that your volunteers are informed about the great opportunities available.

Tell Your Volunteers to Join!

Educate your volunteers about this new program and encourage them to opt-in. You should direct existing volunteers to update their personal information to join the program and make sure that new volunteers understand the benefits of joining from the start.

To support you with this, Cabot and HandsOn Connect has provided you some language that can be used in Emails and Newsletters to your volunteers along with graphics that you can add to these and your webiste!

Sample email and summary text can be found here. Logo and Badge graphics attached below.

PNG RV_Logos_Stack_Color.png

PNG RV_Badges_4.png

Checkout Reward Volunteers' Resources

Cabot's Reward Volunteers program has a toolkit with images and sampel content that you can use to encourage volunteers to opt-in for the syncing of their HandsOn Connect account to Reward Volunteers.

Reward Volunteers Toolkit

How do Volunteers and Organizations Win?

Volunteers and Organizations are selected based on the number of hours served. The more hours the higher the chances of winning.

Volunteers are eligible based on the total number of hours served in a given month.

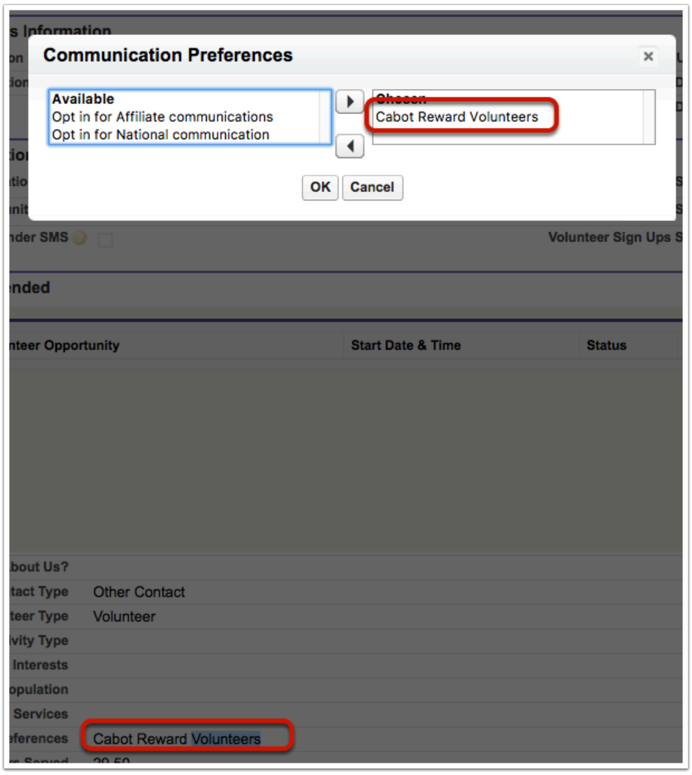
Organizations are eligible based on the number of volunteers they engage in a given month.

So make sure your volunteers are reporting hours and that you and your partner organizations are verifying them in HandsOn Connect. Zero hours means zero chances of winning so get those hours verified and win!

Want to Learn More? Check Out This Connect Exchange Video!

Connect Exchange recording.

Note: On the back end of the system, participation in the rewards program will be tracked in the field "Communication Preferences" in the Contact record.   This will allow you to administratively opt someone in or out of the program, as well as report on how many volunteers are actively pargicipating in the program.


Communication Preferences
Available
Opt in for Affiliate communications
Opt in for National communication
Chosen
Cabot Reward Volunteers
OK
Cancel
Volunteer Sign Ups
Start Date & Time
Status
Other Contact
Volunteer
Cabot Reward Volunteers

Working with Languages

Content Coming Soon!