Working with Contacts & Organizations

Table of Contents

Organizations

Organization Record Basics

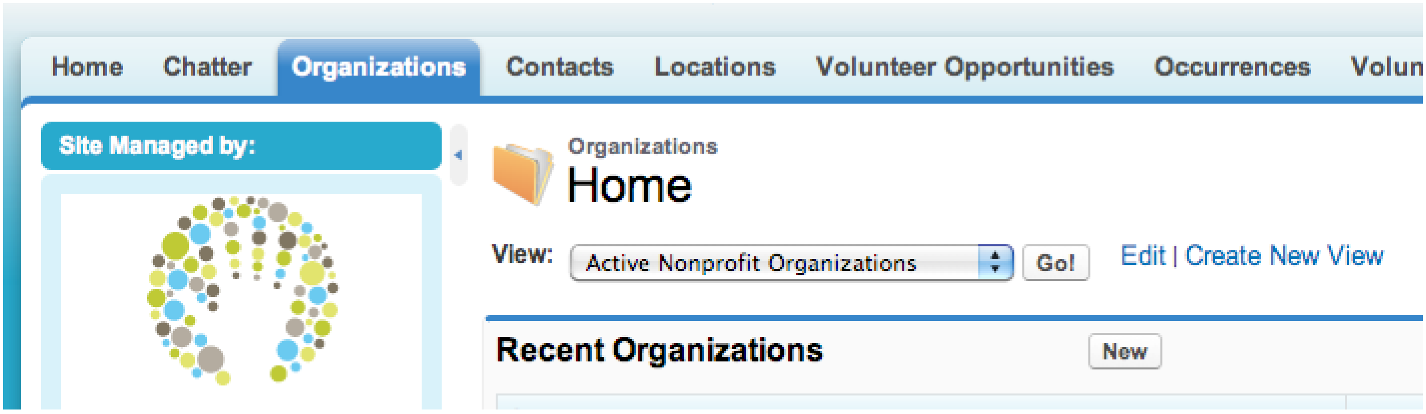
In Salesforce, there are two main record types that are the backbone of its database:

Accounts and Contacts.

Every contact in the system MUST be associated with an account or you are unable to save the record! Contacts are typically associated with the organization that they work for! But we don't always have the organization that someone works for in our database when working with volunteers.

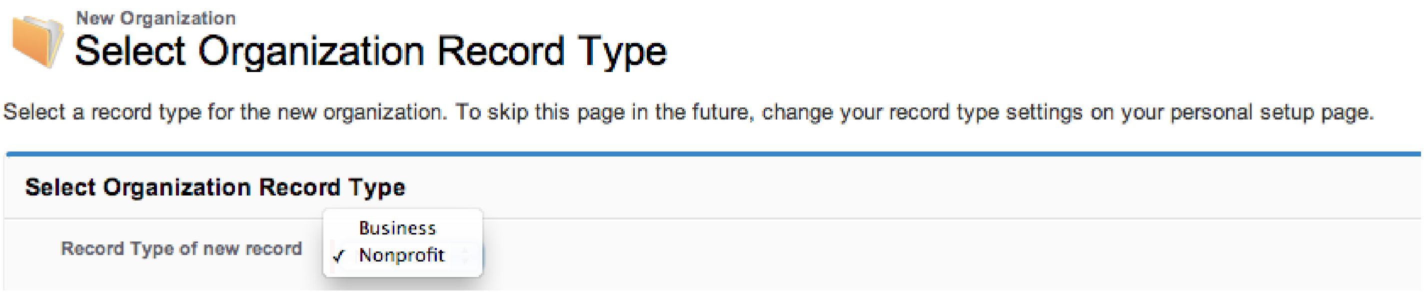
So there are a number of other types of 'accounts" (or as we call them in HandsOn Connect) "organizations"

So what's an organization?



"Accounts" is terminology better suited to the work of a Sales organization. So in HandsOn Connect, the Salesforce objects that are natively known as 'accounts' have been renamed Organizations.

What kinds of organizations do we keep track of in HandsOn Connect?



When we create new organization records in HandsOn Connect - we typically assign them to one of two record types:

Nonprofit Record Type - This record type is used for organizations that you will partner with to post volunteer opportunities on your site. They may be nonprofits but they also might be Civic Organizations, a School, a Government Organization, a faith-based institution or even a foundation. Use this record type for any Active or Prospective Partner Organizations on whose behalf you will recruit volunteers.

Business Record Type - This record type is used for any other entity you do business with. This would include corporations, media, vendors, sponsors, etc. They are typically for-profit organizations who you would not be sending volunteers to. (Though these organizations may be a SOURCE of volunteers).

These two record types have slightly different page layouts based on the information you'd need to track for one type versus another.

Are there other organizational record types?

Yes. Because every new contact MUST be associated with an organization record - and in the nonprofit world not every contact would be associated with a business or nonprofit that you are tracking in your database, volunteer contacts are typically associated with a special Account Record Type of one kind or another.

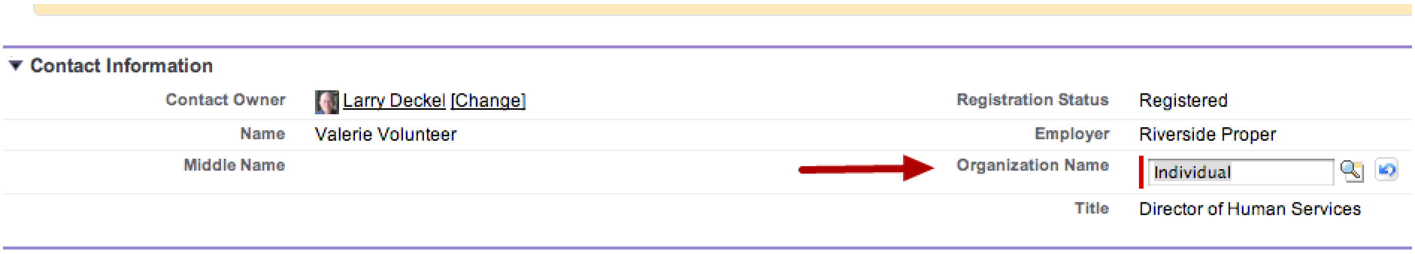
1) **Household Account:** this is a special type of account record type, that typically is used if you are tracking donor information. Users of the NonProfit Success Pack (NPSP) are encouraged to set their SF instance in the Household Account model. In this model, Salesforce automatically creates an account record for a new contact with the name "(LAST NAME) Household". This allows you to associate multiple members of the same household as belonging to the same account - and donations for the household can be tracked. Because of the popularity of the NPSP, in 2017 most new users of HandsOn Connect have been placed in the Household Account model - so that households are automatically created for each of their volunteers.

2). **Administrative Account:** this is a special type of account record type, typically used if you are using Salesforce's HEDA (Higher Education) data model. All contacts are associated with an account with the name "(LAST NAME) Administrative Account"

3) **Individual Account:** There is also an organizational record type called **Individual**. It is a generic account that was the original default account model for HandsOn Connect. Customers using HOC prior to 2017 generally are in the Individual Account model.

Why would 'individual' be an organization?

There is only one organization record of this type, and that organization is called **Individual.** In the individual account model It's used as the default account for each contact.



Since its necessary for every contact to be associated with an organization, and in the case of our volunteers we might not know who their employer is, HandsOn Connect, in the Individual Account model, by default, initially assigns each volunteer who registers on the public site to the 'phantom' organization, **Individual.** That way the record can be created.

If you later find out who the volunteer's employer is -- you can update their contact record to reflect their real organizational relationship. (To do this though, you'd have to create an organizational record for their employer.)

(In this example - on her registration form Valerie Volunteer said her employer was "Riverside Proper" but the system assigns her to the Organization "Individual".

If and when we add Riverside Proper to our database as an organization (if we wish to track them), we could edit the record and then use the Lookup field to find the "Riverside Proper" record and associate Valerie as an employee of theirs. This is entirely optional. (As long as she has the organization Name "Individual" her record can exist in the system.

Account Models

If you're using the Household Model or the Admin Account Model - these organizations are created for you automatically. If you're in the "Individual Account" Model -- the one record "Individual" is already part of HandsOn Connect.

[See this next article on how organization records are typically added to your data via the public site:]()

How do organizations get added to your data?

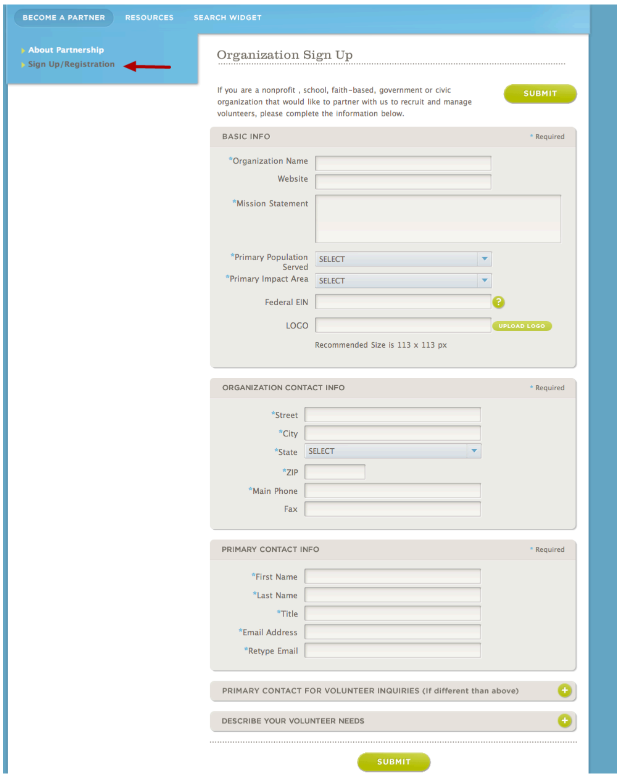
Organizations can be added to the system in one of three ways:

1. By an organization registering themselves on your public site
2. By your staff or system administrator adding them to your data
3. Through importing data from an external source

The easiest way for organizational data to be populated in the system is when an organization registers on the public site

Organizations can navigate on your public site and complete a registration form which will create both an organization record for them, as well as contact information for the primary contact and optionally the main contact for volunteers. This is the easiest way for data to get into the system as all required fields are filled in and everything happens automatically!

When an organization registers itself via the public site, an organization record is created for them of record type "nonprofit". Contacts are created and associated with this organization.



See this post for full details on partner registration via the public site.

Licensed Salesforce Users (System Admin or Staff) can create new organization records directly

This will be discussed in the next chapter

Data can also be imported into the system

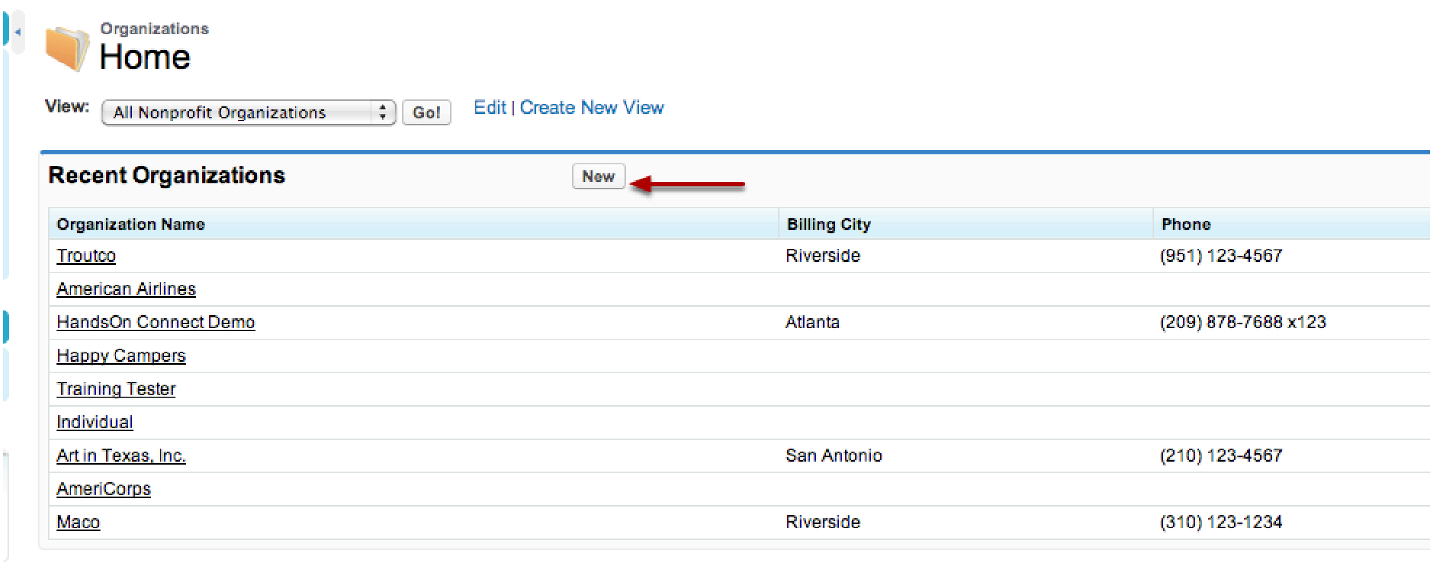
As part of your deployment and setup of HandsOn Connect, your organizational data from your prior technology will be imported into the system for you. Additionally, there will be a raining on Data Management which will show you how to bulk import new organizations into your organization if you want to enter a lot of information at once.

Creating a New Organization - (selecting the organization record type)

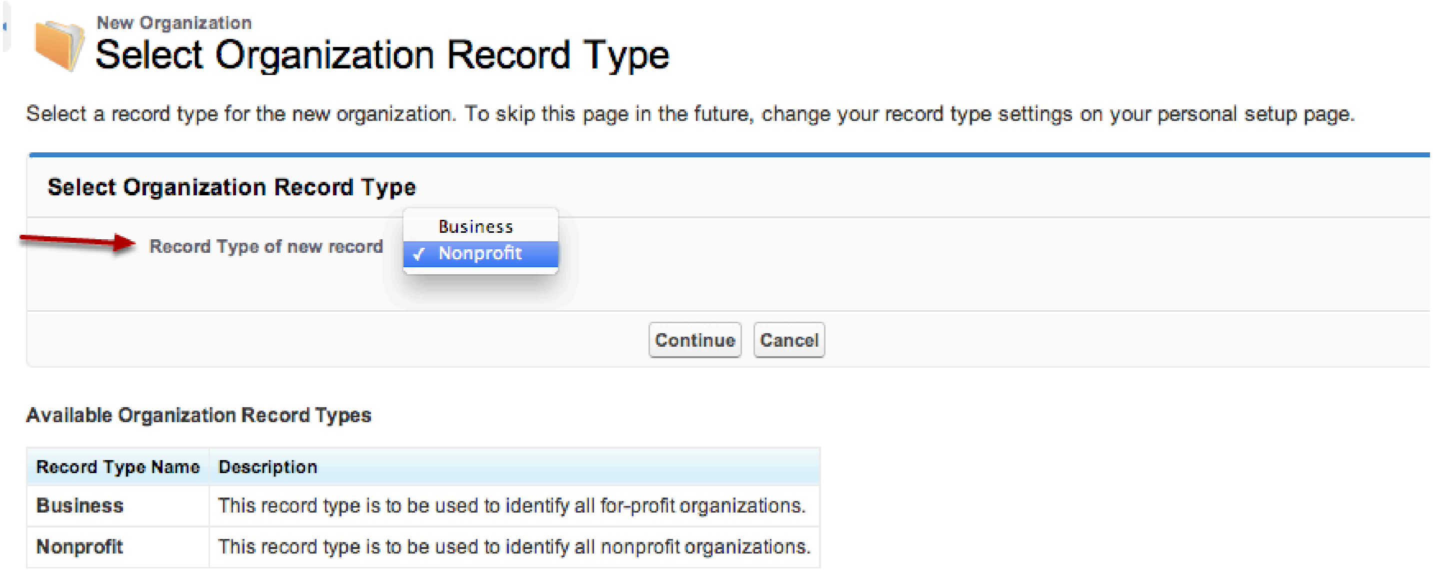
If you wanted to add a contact to the system from a business card, for an organization that isn't already in your database, the best practice would be to create the organization first.

That way - when you create the contact record, you'll be able to associate the contact with your newly created organization record.

To create a new organization record, click new from the Organization home page:



When you create a new organization record, you can choose whether they are a nonprofit or business record.



Select either "Business" or "Nonprofit" from the picklist and click Continue to create a new, blank organizational record.

As we mentioned earlier - there is also an "individual" organizational record type -- but its been hidden from you so you don't accidentally create a second organization of type "Individual"

Note: Be sure to never delete the record for the one organization named **Individual.**

Creating / Editing a nonprofit organization record

Most of the fields in the nonprofit record are fairly self-explanatory, but a few are worth understanding the underlying business practices for their use.

You can tab from one field to another.

Only the fields with the Red sidebar are required fields that MUST be filled out.

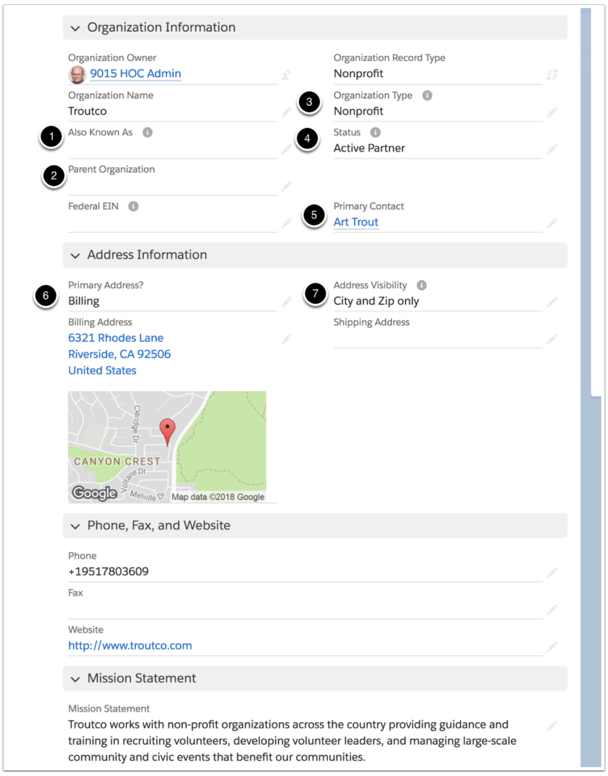
Other fields can be left blank if desired, and filled in later.

The layout for your nonprofit record page may be different than the one pictured below. Page layouts can be customized by your system administrator to remove fields unnecessary for your organization, and to add additional custom fields.

Note also that if you're using the NonProfit Success Pack to track donations, etc. - the page layout may include a number of additional sections.

The page layout below is shown in Salesforce Lightning. The Classic Layout has much the same fields, but they may be organized differently.

The nonprofit organization record fields



You can tab through each field and add data. Any field with a red asterisk is required.

Many fields are self-explanatory. \\ The 'i" symbols are rollover help tips for certain fields.

Here are a few details about some fields that may need explanation:

1. **Also Known as**: This aids in search. A company's real name may be The Home Depot Inc, but you'd want to list "Home Depot" as an aka

2. **Parent Organization**: If an organization is a chapter, branch, or store that is part of a larger organization, you can look up and associate them with their larger, parent organization.

3. **Type**: Select the TYPE of organization from a picklist that includes:

• Civic Organization - Any non-government club, community group, service organization etc that is not any of the other types

• Faith-Based Organization

• Foundation

• Government Organization

• Nonprofit

• School

These are all different sorts of organizations that you might recruit volunteers for.

4. **Status**: (in some instances of HOC this field is labeled "**Volunteer Management Status**" for clarity.
Select one of the following values:

•Pending – They are potentially an organization you could list volunteer opportunities for, but you've not yet finished the approval process

•Active Partner – you have completed whatever your internal workflow is where you will post or allow posting of opportunities with them.   Active Partners will appear on the website under BROWSE ORGANIZATIONS   Until you make an organization an "Active Partner" you cannot grant their employees PARTNER access to the system.   **Note:** If you make an organization an 'active partner' it will show up in the list of organizations that volunteers can self-report volunteer opportunities with. You can not make an organization an active partner until you have associated a Primary Contact (5) to the organization.

•Inactive – Since we recommend never deleting data, this is the status you should put a partner in when you are no longer engaged in business with the organization. You will no longer be allowing them to post volunteer opportunities. (Perhaps they no longer exist - but did in the past.   You want to keep the archival info about them - but they are no longer an active partner.

Note: *When you make an organization inactive -- it will automatically update the status of of all their volunteer opportunities to inactive, which will prevent them from appearing on the public website for signup.   Before making an organization inactive you should do the following:*

a) Look at all the organization contacts and make sure they no longer have login access as partner staff.

b) Check all occurrences that have end dates in the future and make sure there are no connections associated with them. You may want to notify any volunteers that you are no longer partnering with the organization, and they will not be able to contact them as volunteers through the system. They won't be able to report attendance, etc.   You may want to just update any occurrence records to "Cancelled" which will notify volunteers the occurrence they are already signed up for is no longer being held.

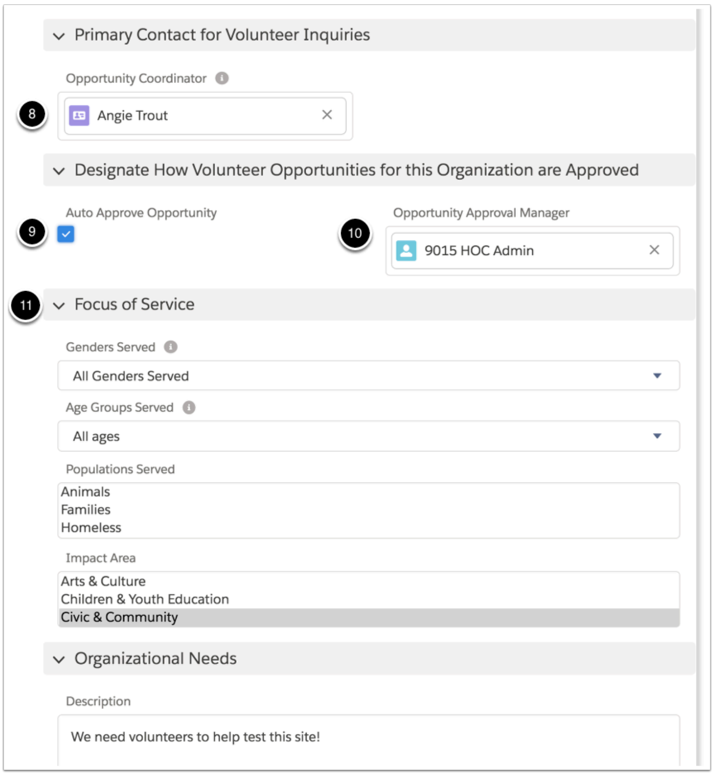
5. **Primary Contact**: Who is your main contact in this organization? You can't use this lookup field and enter it until you've added them as a contact in the system. This field must be populated before you can change the status of an organization to 'active partner".

6. You must specify one of the address fields as the **primary address**:

•BILLING is the default when they enter the info from the public site, but you can assign either a billing or shipping address to the organization. (The use of the terms 'billing' and 'shipping' are standard salesforce conventions.   You probably will be neither billing nor shipping to your nonprofit partners. So use whichever address field makes most sense to you :-)

•NOTE: Because we associate a lot of other addresses with nonprofit organizations (places where their volunteer opportunities occur) we have a related object called LOCATIONS, for project locations.

7. **Address Visibility**: You can choose whether to display the full address, or just city, state and zip on the public website. Doing the latter protects confidentiality for the organization and prevents volunteers from just showing up without signing up ahead of time.



8. Opportunity Coordinator - This is the default person at the organization who generally coordinates volunteer opportunties. (It is the value created via the public site if a principal volunteer contact is identified)

9. Auto Approve Opportunity: Allows partner to post volunteer opportunities without overview or approval of your organization if checked.

10. Opportunity Approval Manager – This is the person **at your organization** (a user (staff or admin), who is notified when an opportunity is awaiting approval by this organization.

11. Focus of Service:

Selections made in this section become defaults chosen when a volunteer opportunity is associated with this organization.

12. Organizational Needs: This field, "Description" is visible in the customer portal for partner organizations. It is populated during registration by the answer to: "Describe your Needs". It is where they can state what they need volunteers for. If creating the record administratively, you would usually leave it blank. (If you DO populate it - remember it will be visible to them as well in the customer portal)

IMPORTANT! Click save before leaving the page.

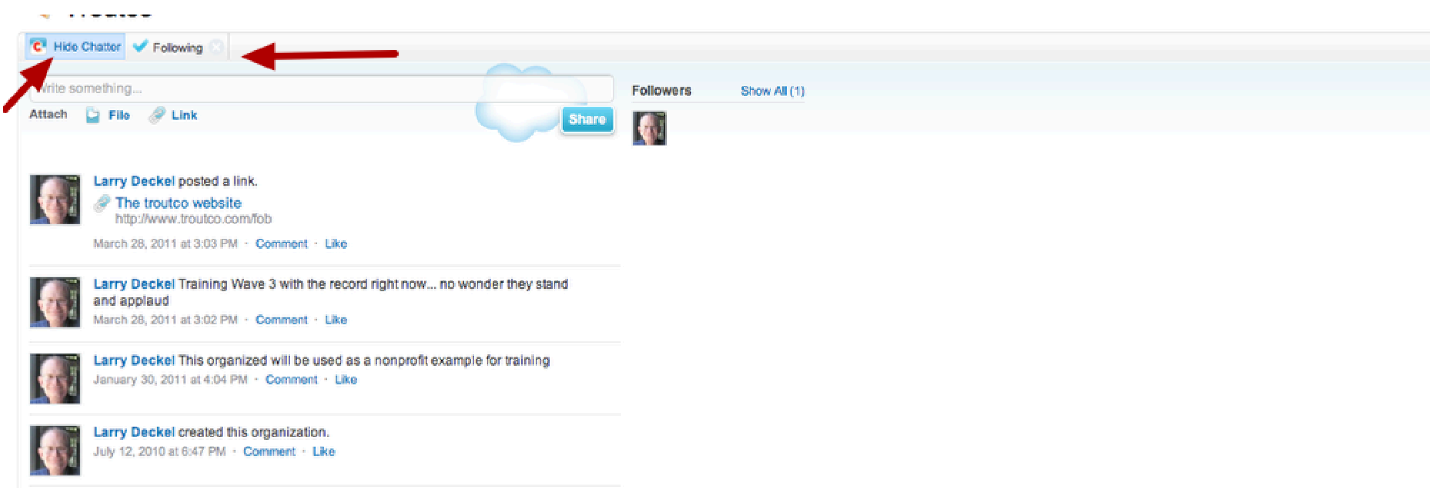
Note: when an organization registers through the public site, the bulk of this organizational record is filled out for you! So encourage organizations to use the public website to enter their information!

The saved view of a nonprofit organization record and its related lists and custom links

When you normally look at an organizational record, you're seeing it in its "read" or "saved" view. Here you will see some additional features that don't exist in the "edit" mode.

- "Chatter " details
- A Custom 'Organization Overview" that tells you information about the record
- Custom links
- Related Lists

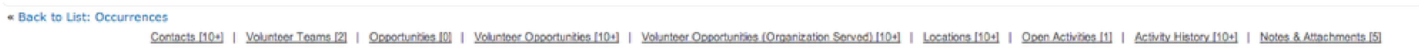
Chatter



If you choose to 'follow' a record in Chatter, you'll see a thread of chatter posts telling you what's happened resolutely with the record. You can add additional comments about the record if you wish. (Chatter will be discussed in more detail in the next Training session).

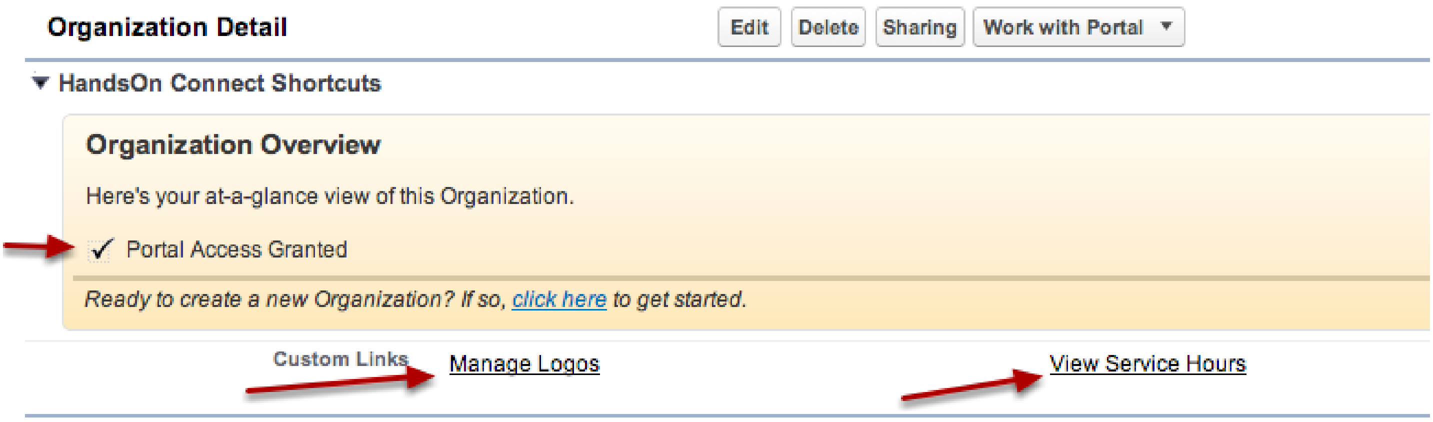
You can hide chatter or choose to follow or not follow the record by checking the boxes at the top of the chatter area. You can also add files or links to the chatter comments.

Hover links for related lists



Related lists are visible after the record detail, but if you want to save yourself some scrolling you can hover over any of these related list hyperlinks and see information about the objects that are related to this organization record.

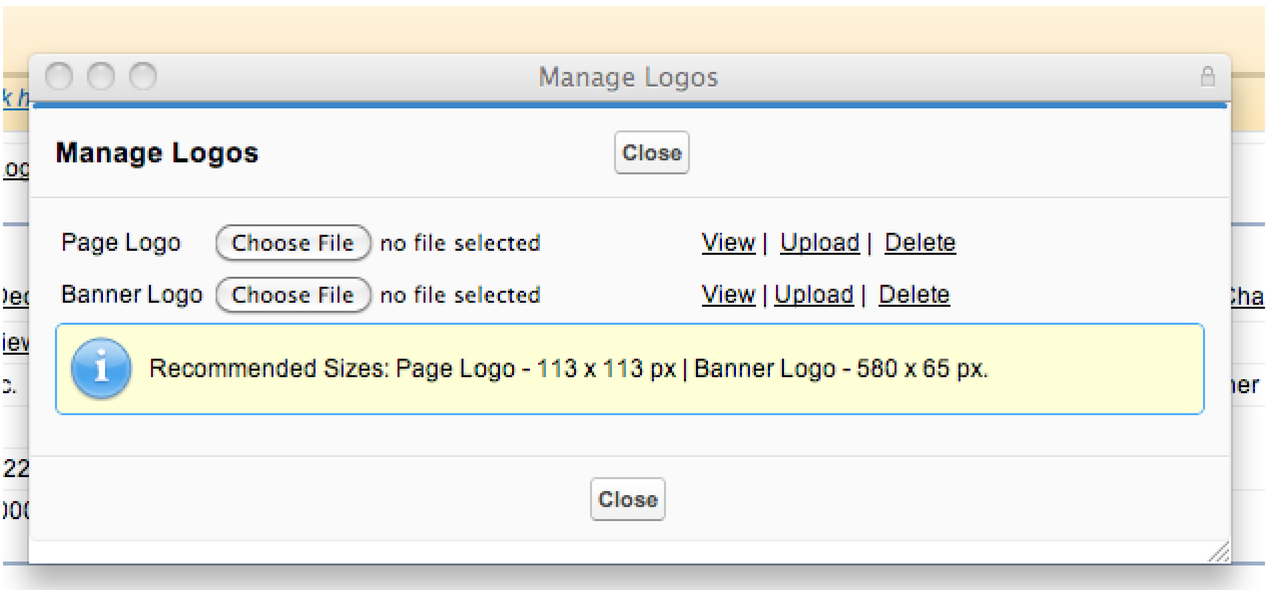
HandsOn Connect Shortcuts



The organization detail 'dashboard' lets you see at a glance if the organization has 'portal access' -- which means that someone in the organization is able to log-in to the partner portal and view & submit volunteer opportunities, as well as report attendance. There are also buttons on this part of the page that allow you to return to edit mode, delete the record (Tip: Don't delete data!), Set Manual Sharing for the record, or access the customer portal. All of these will be explained in later lessons.

The custom links allow you to Manage Logos, and View Service Hours.

Manage Logos

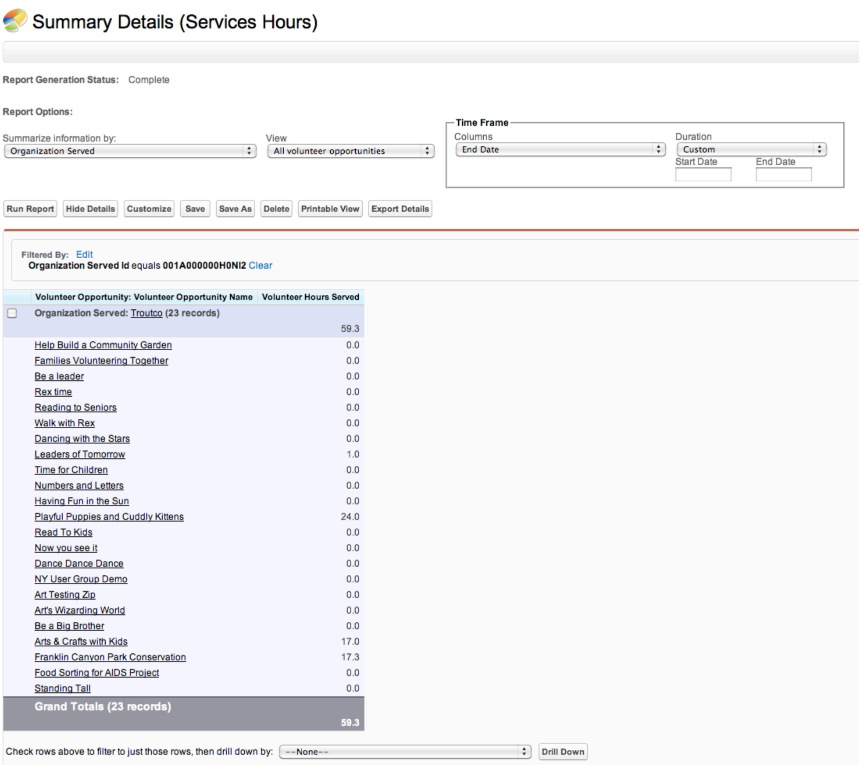


Clicking on Manage Logos allows you to upload two logos that can be used on conjunction with the organizational record.

Page Logo: needs to be square (113 x 113 pixels), and is used on the Browse Organization Page on the public site. You'll want all your nonprofit partners to have a Page Logo.

Banner Logo: is used for sponsor banner ads that appear on Volunteer Search or Volunteer Detail pages as controlled under sponsor management. These need to be 580 pixels wide x 65 pixels tall.

View Service Hours is a link that opens a report that summarizes service hours associated with this organization.

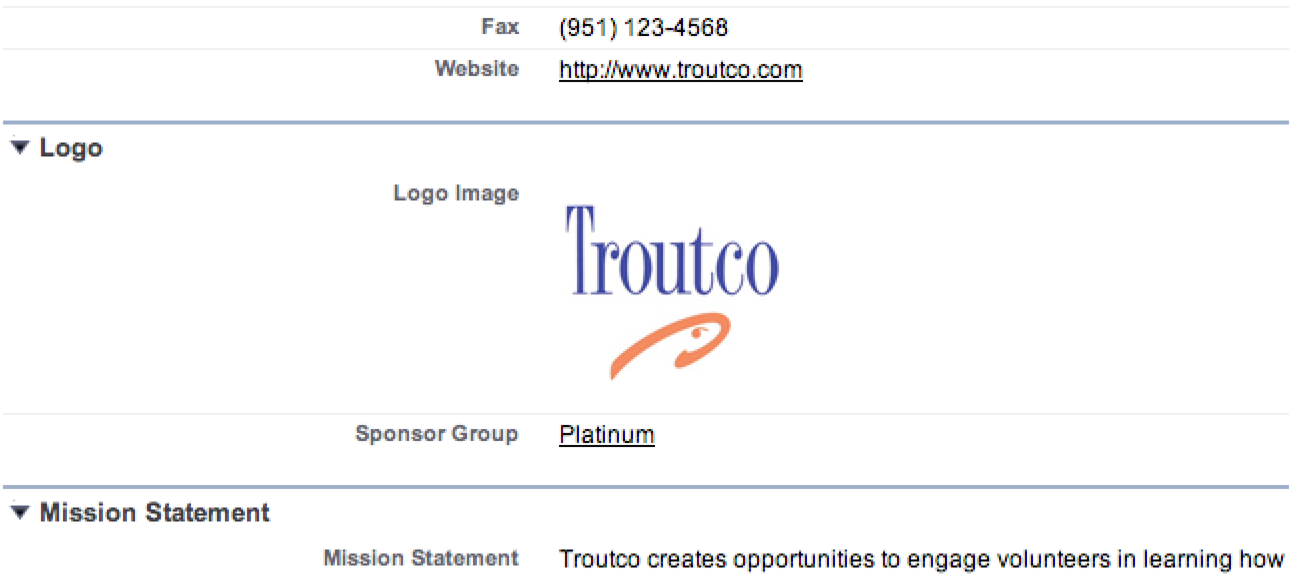


Volunteer Opportunity: Volunteer Opportunity Name	Volunteer Hours Served
Organization Served: Troutco (23 records)	59.3
Help Build a Community Garden	0.0
Families Volunteering Together	0.0
Be a leader	0.0
Rex time	0.0
Reading to Seniors	0.0
Walk with Rex	0.0
Dancing with the Stars	0.0
Leaders of Tomorrow	1.0
Time for Children	0.0
Numbers and Letters	0.0
Having Fun in the Sun	0.0
Playful Puppies and Cuddly Kittens	24.0
Read To Kids	0.0
Now you see it	0.0
Dance Dance Dance	0.0
NY User Group Demo	0.0
Art Testing Zip	0.0
Art's Wizarding World	0.0
Be a Big Brother	0.0
Arts & Crafts with Kids	17.0
Franklin Canyon Park Conservation	17.3
Food Sorting for AIDS Project	0.0
Standing Tall	0.0
Grand Totals (23 records)	59.3

Clicking on the "View Service Hours" hyperlink opens up a summary detail report for this organization that shows you how many opportunities they have, and the total number of verified service hours.

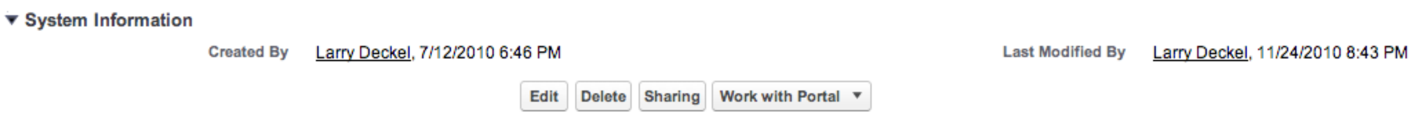
You can use the "Drill down" picklist to get a deeper level of detail if you wish (i.e., how many opportunities and hours took place in each city. You'll learn more about working with Salesforce Reports in a later training.

The Logo Section of the record now shows the organizational logo



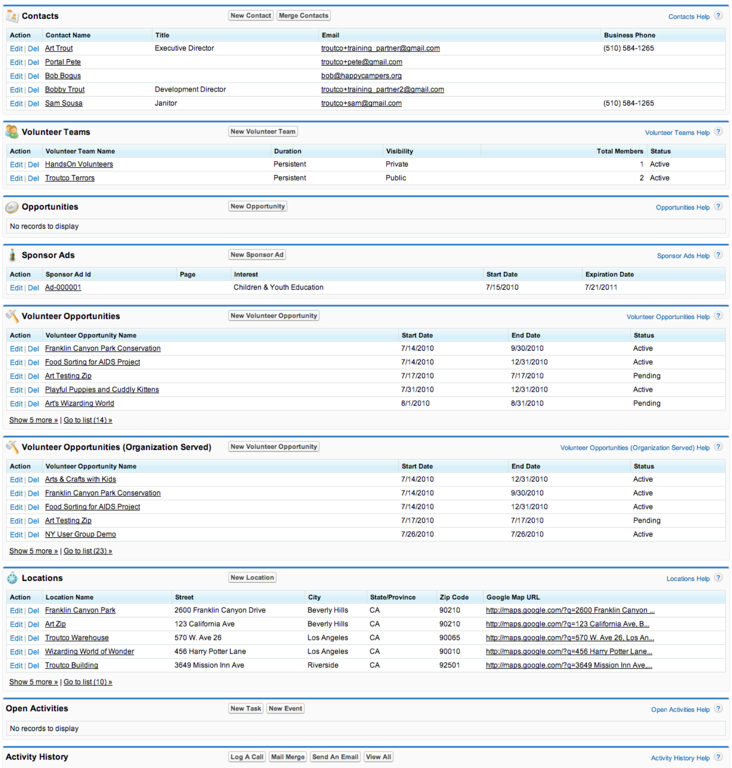
Remember in the edit mode how we couldn't do anything with the logo field? By using the custom link at the top of the page, you can add an organizational logo which will now be visible here in the record itself.

System Information



The last section in the record detail, "System Information", tells you who created the record and when, and when it was last modified and by whom.

Related Lists appear after the record detail. These are lists of records that have a relationship to this organization and include:



Contacts - people who are employed or primarily associated with this organization

Volunteer Teams - teams of volunteers that were created and associated with this organization

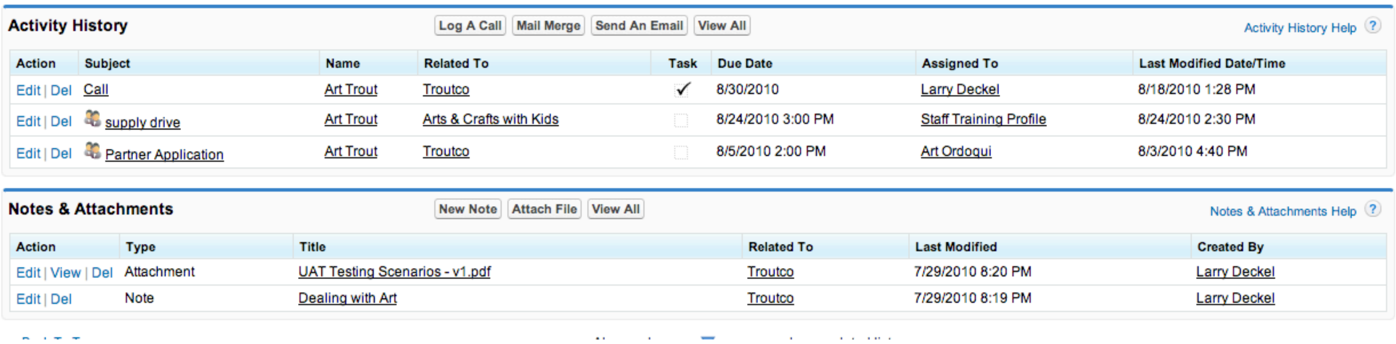
Opportunities - This is a fund raising field in sales force – not to be confused with Volunteer Opportunities, but you might use if you keep track of 'asks' for donations

Volunteer Opportunities - All opportunities that are managed by this organization.

Volunteer Opportunities (organization Served) - All opportunities that SERVE this organization.

Locations - Addresses where volunteer opportunities take place for this organization.

Open Activities - Salesforce activities related to this organization (things to do). For example, you might create a task for yourself to call the primary contact of the organization You can also use this list to ***Log a Call,*** *or* ***Send an Email***



Activity History | Log A Call | Mail Merge | Send An Email | View All | Activity History Help

Action	Subject	Name	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit | Del	Call	Art Trout	Troutco	✓	8/30/2010	Larry Deckel	8/18/2010 1:28 PM
Edit | Del	supply drive	Art Trout	Arts & Crafts with Kids		8/24/2010 3:00 PM	Staff Training Profile	8/24/2010 2:30 PM
Edit | Del	Partner Application	Art Trout	Troutco		8/5/2010 2:00 PM	Art Ordoqui	8/3/2010 4:40 PM

Notes & Attachments | New Note | Attach File | View All | Notes & Attachments Help

Action	Type	Title	Related To	Last Modified	Created By
Edit | View | Del	Attachment	UAT Testing Scenarios - v1.pdf	Troutco	7/29/2010 8:20 PM	Larry Deckel
Edit | Del	Note	Dealing with Art	Troutco	7/29/2010 8:19 PM	Larry Deckel

Activity History - past records of activities that have been completed for this organization

Notes and Attachments - Things you want to associate with this organization. Notes can be private or public (private means its staff only and not visible in the portals) No notes are completely private to you. You can also attach files..... (their brochure, waiver, etc.)

An organizational record may appear differently depending on the profile of the user that is viewing it!

There are actually 4 different views of an organizational record, and you can customize what fields are visible and/or editable in each view.

Views are assigned to each profile and can be the same or different depending on what information you want to make available to:

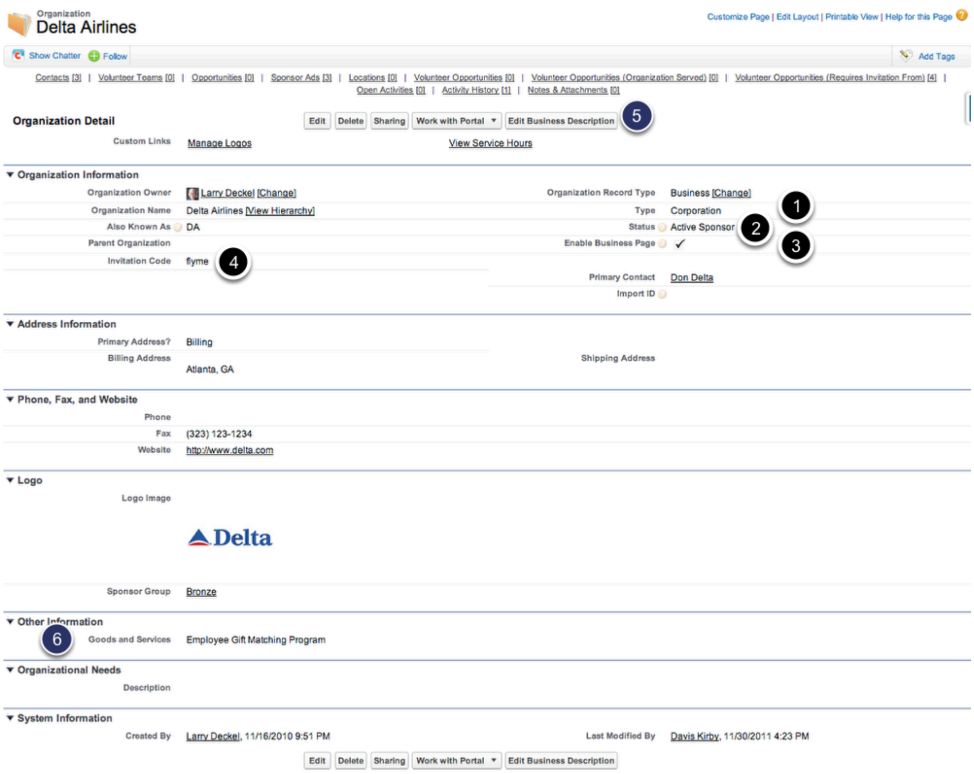
- System Administrator
- Staff
- Partner Staff (in their customer portal)
- Volunteer Leaders (in their customer portal)

We'll discuss how to customize page layouts in the training on Customizing HandsOn Connect

Creating / Editing a business organization record

For the most part, the Business Organization record-type is very similar to the non-profit record type. But there are a few fields unique to Businesses.

Fields and picklists in the Business Record layout



Organizations of 'Business Record type, for the most part similar to those of [nonprofit record type](#)

A few fields are not present here (such as Tax exempt #). And they have a few unique fields of their own:

1. Type: There are only two options in this picklist. Corporation and Foundation.

2. Status: The picklist here has three values:

- Pending - is used for businesses you don't have a donor relationship with but want to keep track of in the database
- Active Sponsor - is used for businesses who are working directly with your organization and are a source of revenue or in-kind goods. This must be chosen if you are publishing sponsor pages or business pages for this corporation.

- Inactive - is used for a business you are no longer working with. (*Note: We do not recommend deleting records. Instead, just mark them as Inactive which preserves the data and its relationships - but you can use to filter out of reports and views)*

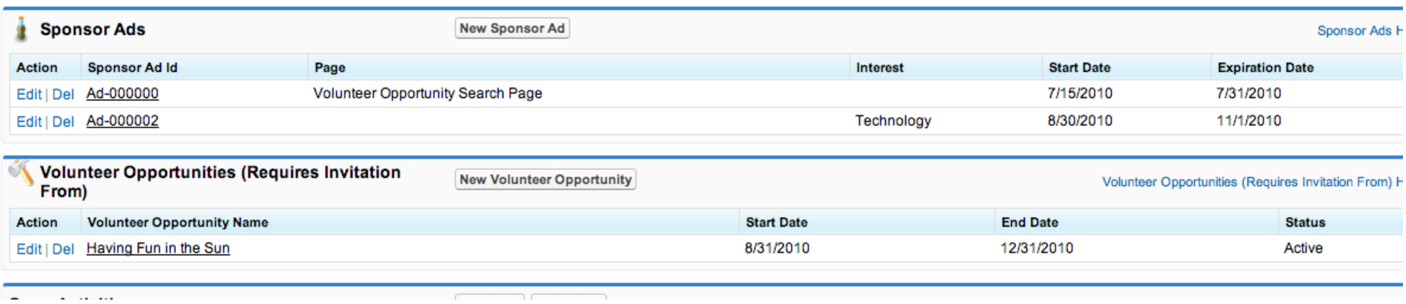
3. Enable Business Page - check this box if you plan to publish a business page on the public site with the company's **5.** Business Description, and its private opportunities controlled by the invitation code (4)

4. **Invitation Code** - Used to create a 'private' project – opportunities associated with this organization can only be accessed by using this 'invitation code' (a secret password or any combination of letters or numbers: i.e. "swordfish" "coffee") When you create a private opportunity for an organization, this is the code that will 'unlock' the opportunity in search on the public site, either through the search page or the business page.

5. **Business Description -** This is the content that appears on the business page for this organization, if enabled. You can use the systems [WYSIWYG editor] to populate this description.

5. Goods and Services - Is a multi-picklist that allows you to associate goods and services this organization can provide to your organization. (Useful for reports and searches). A few starter goods and services are on this list, and additional goods and services can be added by your system administrator.

There are two 'related lists' that are unique to the business record type



Sponsor ads - Show a list of sponsor ads that are associated with this organization, as well as their page location or interest, start and end date. Instructions on how to associate sponsor ads with an organization will be covered in the Customizing HandsOn Connect Training.

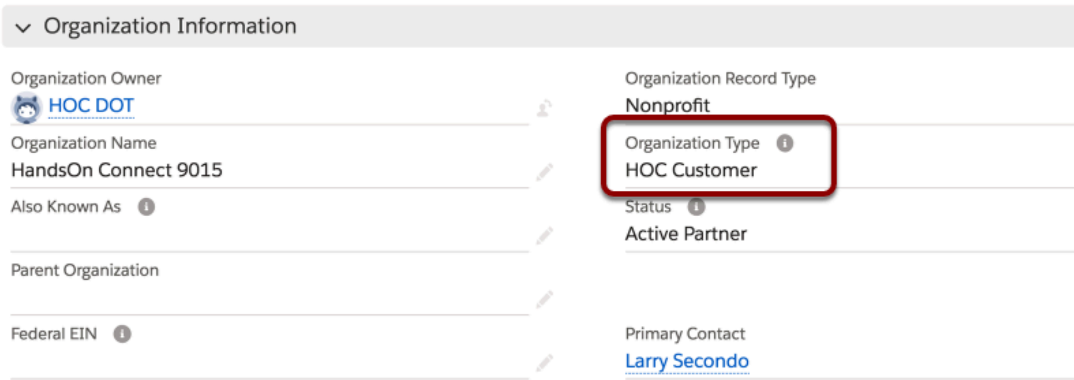
Volunteer Opportunities (Requires invitation from): Is a list of 'private' opportunities that require the organization's invitation code.

The HOC Customer Record

All the nonprofit organizational records in the system have a type of either, Civic Organization, Faith-based Organization, Foundation, Government Organization, Nonprofit or School.

However -- one record in the system has a unique 'type' in its record: HOC Customer

There is only one HOC Customer Record - and that's YOUR organization



Look up your organization's name in search, and you'll find the one record designated as type **HOC Customer.** This record has special significance in the system,

Even though your organization is technically a nonprofit -- you MUST leave this record designated as type: HOC Customer

Without a HOC Customer Record the system has no way to identify who the owner of the site, who is the managing organization of affiliate-managed volunteer opportunities,

⚠ Do not change the type of this one HOC Customer record. (And do not assign the type of HOC Customer to any other organizational record).

Where are my organization's contacts?

Even though everyone on your staff has a **User** record and a Salesforce license - you may find they don't yet have a **Contact** record.

You will need to make sure there is a contact record for any staff member who ever wishes to volunteer or act as opportunity coordinator for an opportunity.

Only **contacts** can be made Opportunity Coordinators or connected to opportunities and occurrences.

Contacts

A few things to know about Contact Records

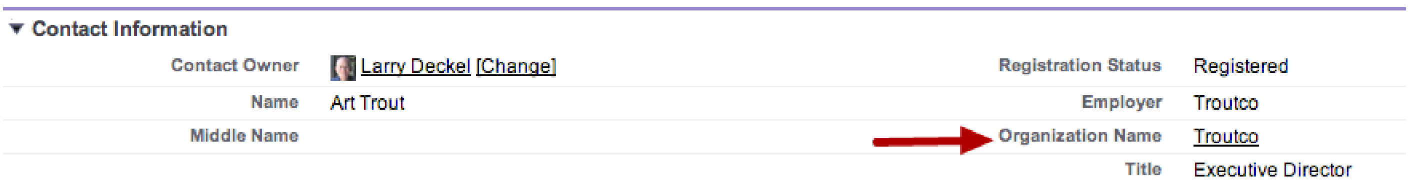
Every person that you wish to keep track of should have a contact record in the system. The contact record keeps track of:

- Address Information
- Phone Information
- Email Information
- Demographic Information

Also the contact record keeps track of additional information for contacts that have a log-in / profile assigned to them.

- Volunteer Information used to manage their volunteer sign-ups (interests, communication preferences, total hours of service, restrictions, etc.)
- Skilled Volunteer profile information.

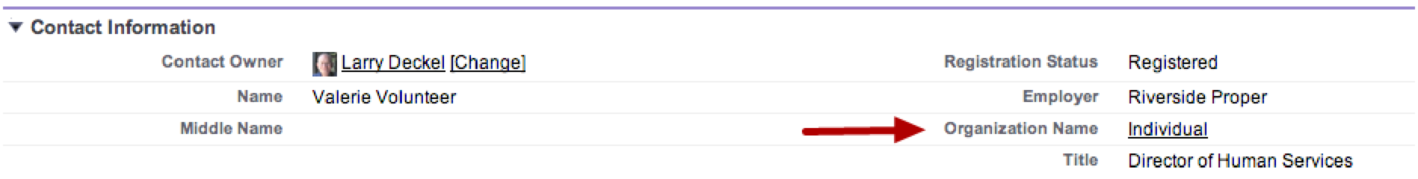
Every Contact must have an organization it is associated with.



Contacts are sometimes associated with their employer (this is typically done for your nonprofit partner organization's contacts)- but in HandsOn Connect, most contacts are associated with a special organization. What organization they are associated with depends on the Account Model of your instance in Salesforce.

Individual (Bucket) Account Model:

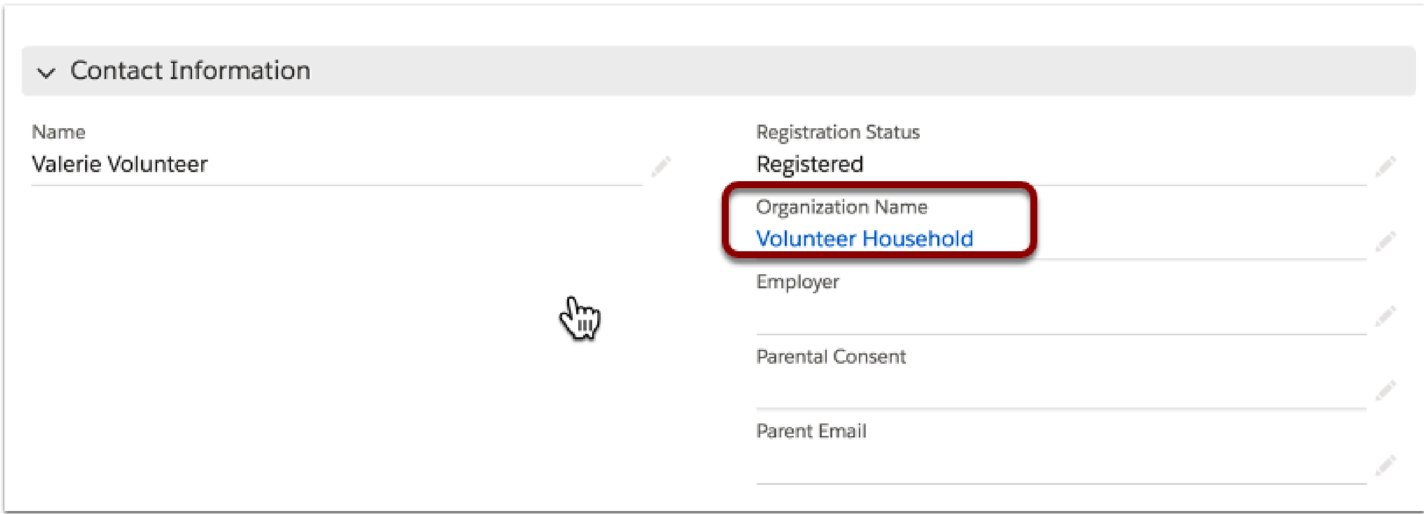
Volunteers who register on the public site in older instances of HandsOn Connect are usually associated with the Organization "Individual". Individual is a sort of phantom organization that means we either don't know who their employer is, or might not yet have that employer created as an Organization Record. So all newly created contacts are automatically associated with "Individual". After they are created - they can have their organization changed if their employer is actually known.



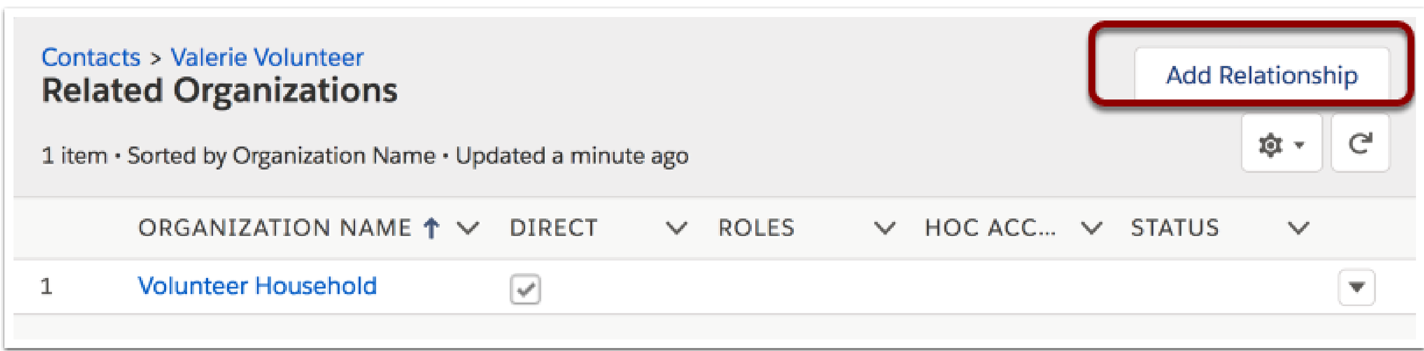
Household Account Model:.

Newer HOC customers, or those who have converted to the household model for the Non Profit Success Pack have the organization of each contact associated with "(Last Name) Household" -- an account that is automatically created for each new contact.   This 'account' keeps track of donation information across multiple members of the same 'household". A household account can be associated with multiple contacts (who all live in the same household).

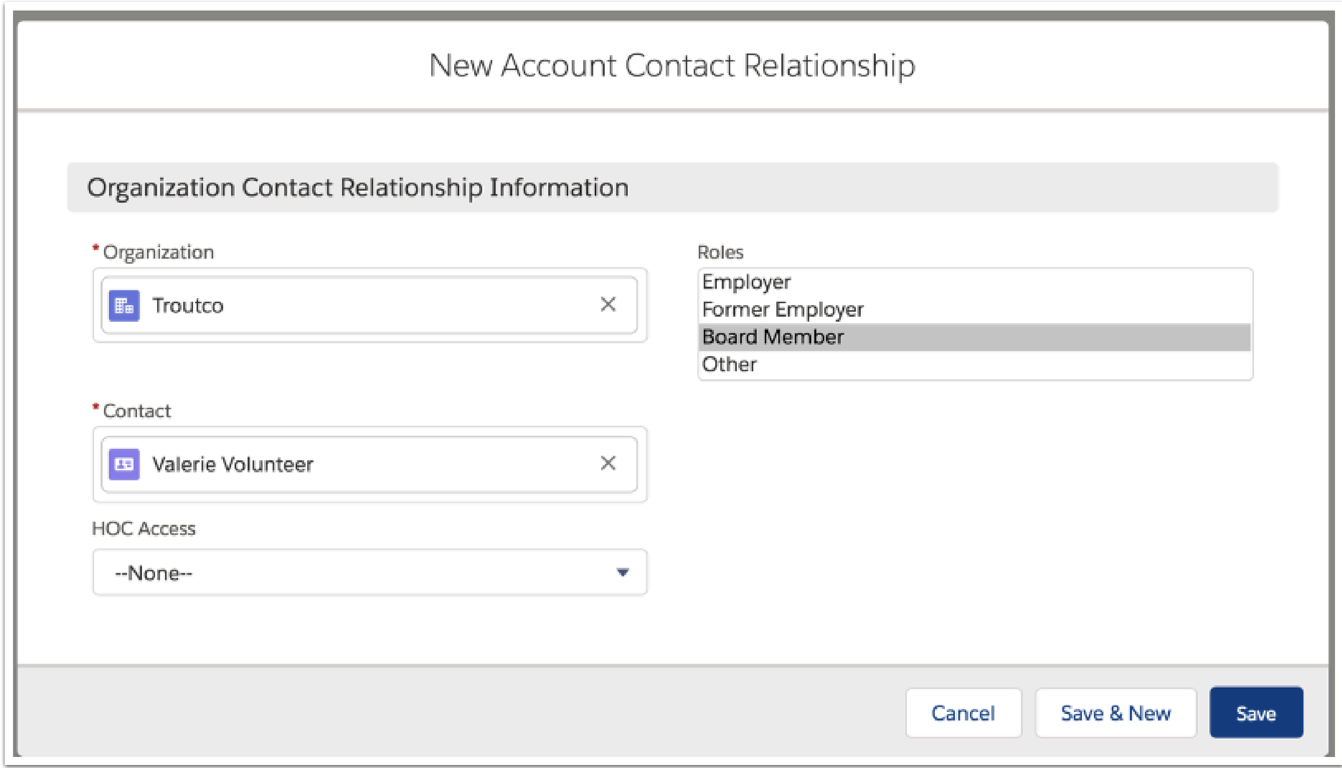
When you administratively create a contact in Salesforce - if you leave the organization name field blank, a Household Account is automatically created for the contact.



How to create a relationship between a contact and additional organiations:



The recommended way to keep track of an organization's employer, and any other organizations they have a relationship to (Board Member, Former Employer, etc.). is by using the related list "Related Organizations". Click on 'Add Relationship" and then define a relationship between your contact and any of the organizations you have in your database.



Your system admin can add additional roles so that you can define any number of possible relationships between an organization and an existing contact.

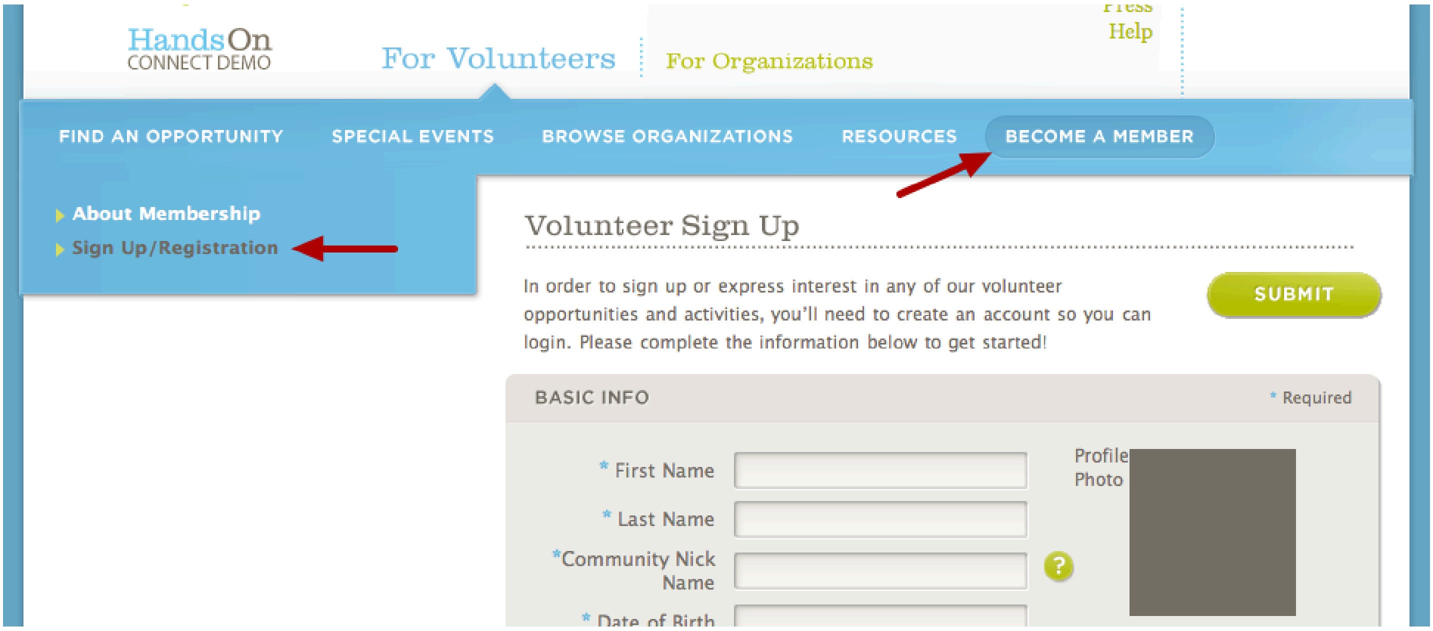
Users of the Non Profit Starter Pack use the related object "Affiliations" to define the relationships between Contacts and Organizations. This related object has additional functionality that only applies to users of the NPSP.

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.

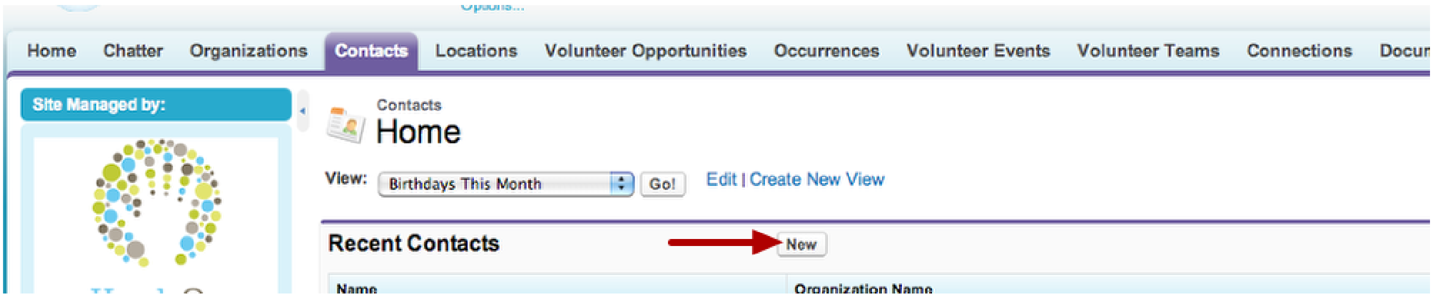
Creating / Editing a contact record

Creating a volunteer from the public site:



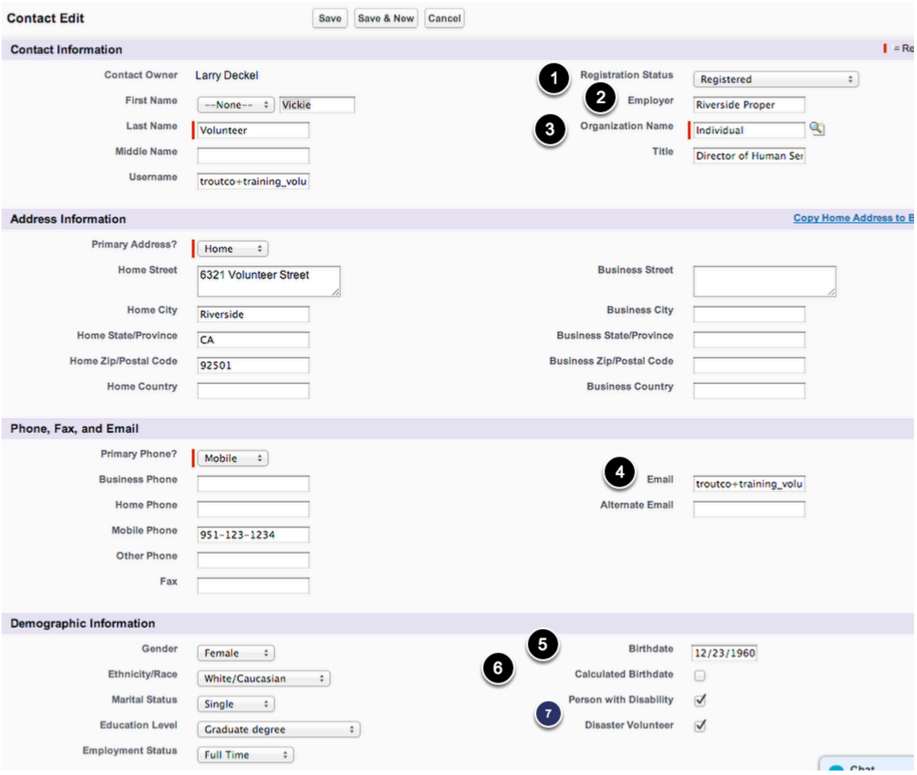
But there are lots of different kinds of contacts you might want to add to your database, and you can always add a contact to the system administratively.

Creating a New Contact



Click on the Contacts Tab and then click on the NEW button on the Contact object Home page

This gives you a blank contact record in edit mode.



Most fields in the contact record are self-explanatory - but here's a few things you should know!

*1. **Registration Status - is** a picklist with the following values:*

• **Registered** - means they registered on public site, OR you have granted them portal access so they have a log-in and password, OR they were imported on set-up as a record.

• **Not Registered** is the status you should use for contacts you create administratively but have not yet (or may never) grant portal access (for example. a vendor contact)

• **Pending (Team Registration)-** the status for individuals who are invited to join a team but have not yet confirmed by registering themselves on your public site. \

They MAY become registered at some point, until then they are 'pseudo-volunteers'. \ They are tracked based on the sign-ups their team captain does on their behalf, but they do not have a login, and there is no guarantee that their email address is correct.

2. **Employer:** This field is the information that was submitted via the public site registration form. It is the name of their employer as the volunteer entered it. It is not automatically made their "organization name" because that field is a 'lookup' field. So this is mostly informational rather than functional.

3. **Organization Name** - is a lookup field and a required field. Each contact must be associated with an organization (usually their employer). If you do not know what organization they are associated with, associate them with the organization '**Individual**' or, if in the **Household Account model**, leave it blank. A household organization will be automatically created.

4. **Email -** The email address is where system communications will be sent to them. You can add an alternate email if you wish to have it as information. If you administratively grant them volunteer access, their email address will become their UserID

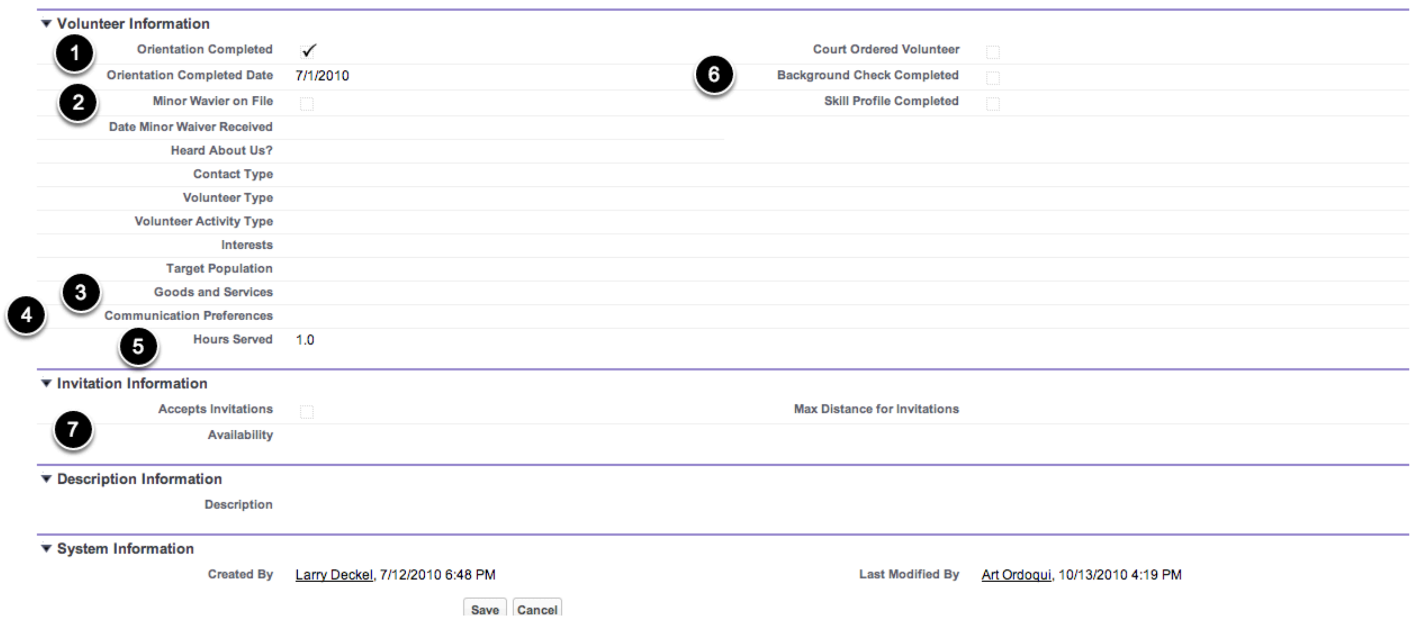
5. **Birthdate** - This field is not required for all contacts **however**:

• Anyone you wish to grant portal access to **MUST** have a birthdate entered

• For your agency partners, If you don't know a birthdate, pick something flattering that's over 21 :-)

6. Calculated Birthdate - • Check this box if you're making up the date (for the purposes of making them over 18 or a minor). Their age will be upped one year every year but you'll know its an estimated number and NOT their actual date of birth.

7. **Person with Disability / Disaster Volunteer -** These are custom questions that can be turned on or off for volunteer registration via the control panel. They are available administratively whether or not they are active on the public site.



7. **Orientation Completed** - check this box if you require and restrict sign-up for opportunities based on whether orientation has been completed

8, **Minor Waiver on File** - if you require minors to submit waivers BEFORE signing up for opportunities, check this box when waiver has been received and filed.

9. **Goods and Services** - you can specify goods and services that an individual can provide your organization. The multi-picklist for this can be modified by your system administrator.

10. **Communication Preferences** - indicates whether individual has opted in for additional local or national communications. (By default these are on for **new** registrations. Volunteers can opt out IF they choose to do so during the registration process. You can optionally do a

mass update of your imported data and opt people in (or request this status to be set to opted in during import).

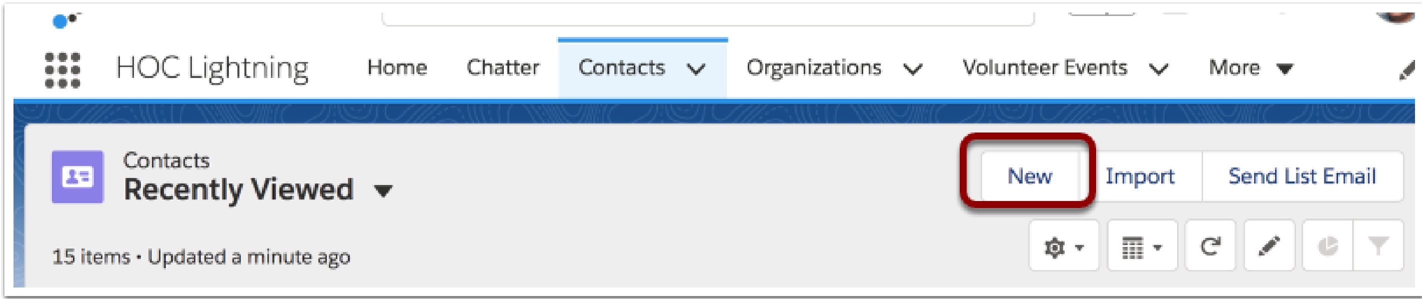
11. **Hours Served** - this is an auto-calculated field. **Do not** manually update this field or it will break the calculation that would normally be made here.

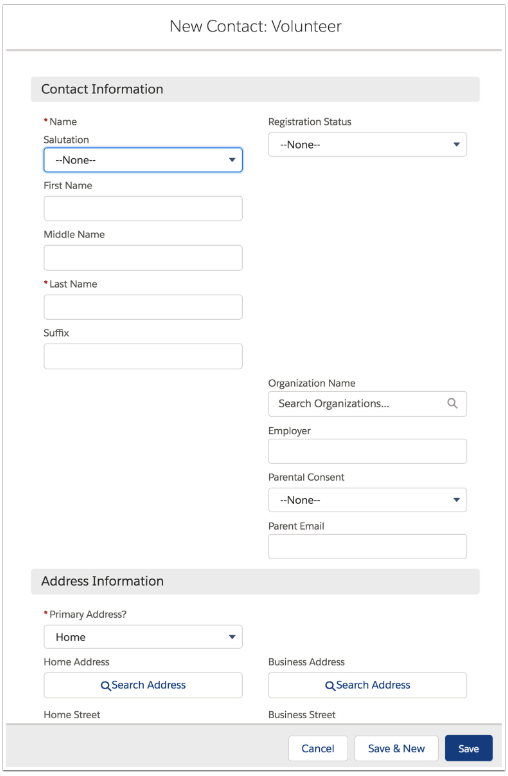
12. **Court Ordered / Background Check / Skills Profile Completed** - these are fields that indicate whether to apply certain restrictions or permissions allowing this contact to volunteer for restricted opportunities.

13. **Invitation Information -** refers to opting in to skill-based volunteer opportunity invitations and is usually populated by updates the volunteer makes during registration and in updating their skills profile.

Note: Exactly what fields will or won't appear when you create a new contact will vary depending on the Contact Page Layout that your system administrator has configured for your use. Typically, fields that your organization isn't making use of will be removed from the page layout.l

Create / Edit Contacts as it appears for SF Lightning users:



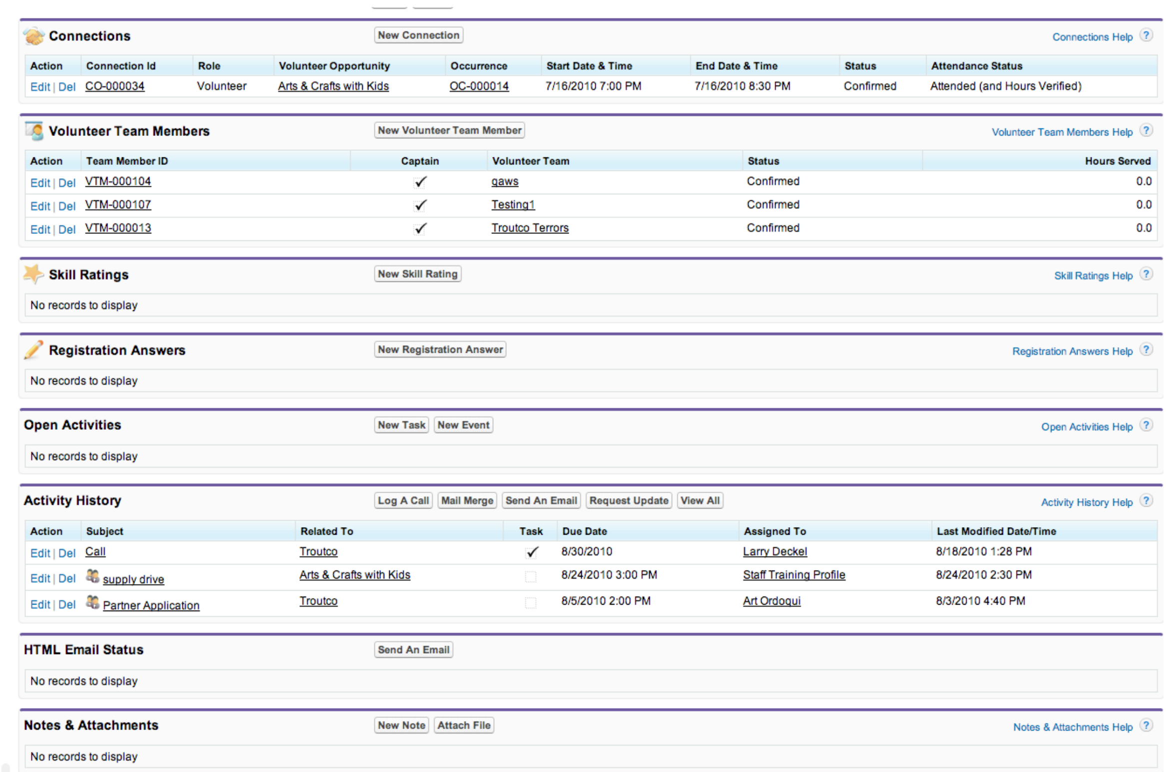

New Contact: Volunteer
Contact Information
*Name
Salutation
--None--
First Name
Middle Name
*Last Name
Suffix
Registration Status
--None--
Organization Name
Search Organizations...
Employer
Parental Consent
--None--
Parent Email
Address Information
*Primary Address?
Home
Home Address
Search Address
Business Address
Search Address
Home Street
Business Street
Cancel
Save & New
Save

Related Lists in the contact record

Like all Salesforce Records - Contacts have related lists of objects that a contact is related to via lookup fields on other objects.

The related lists in your instance of Salesforce may vary from those pictured here as these are customizable by your system administrator.

The following related lists appear in the contact record saved view



Connections - A list of all connections between this volunteer and the opportunities/ occurrences they have signed up for

Volunteer Team Members - a list of all teams where they are a member or a captain with a summary of hours served as part of that team.

Skill Ratings - details from their volunteer skill profile

Registration Answers - Answers to any custom questions that you have added to the standard registration form. (Custom questions can be added by your system administrator).

Open Activities - any tasks or events you schedule with this contact

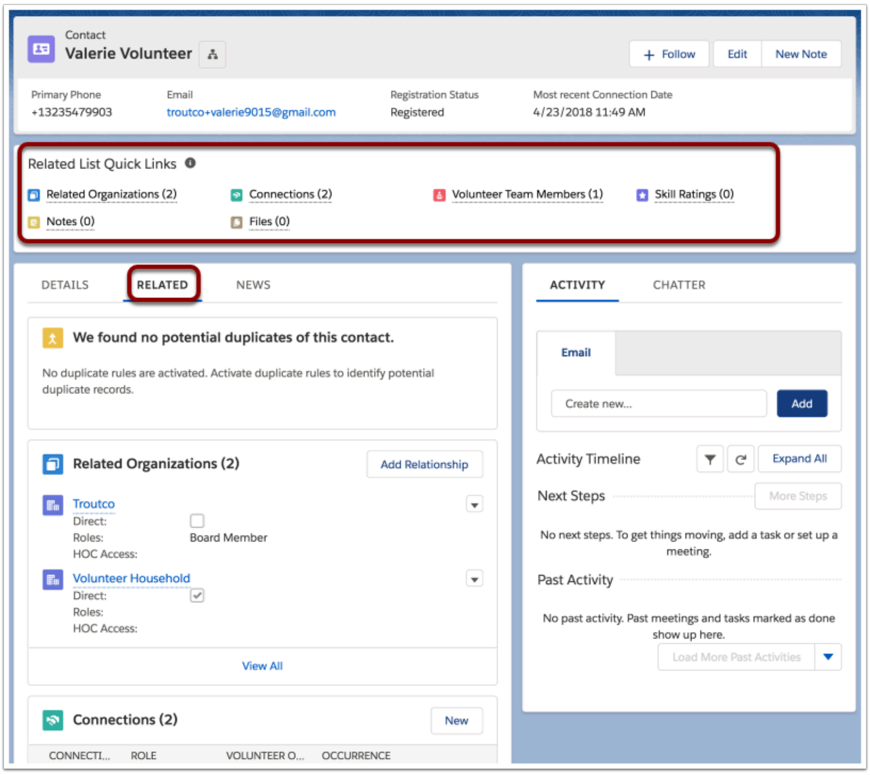
Activity History - a historical record of past activities. You can also use the buttons here to Log a call, Send an Email, or Request an update (a stock email asking for a review of contact information)

HTML Email Status - a record of emails sent in the past. The "Send an Email" button allows you to send an email to the contact. (From here you can use email templates that you have created in your personal setup).

Notes and Attachments - you can attach notes or files to the contact record here. (Note: notes marked as 'private' are accessible to you and any system administrator - so they are not completely private.)

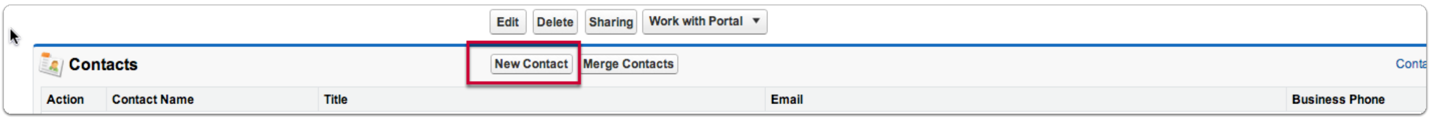
Related Lists in SF Lightning

If you are using SF lightning related lists are presented in a number of different ways.   You may have a "related list quick links" component - that gives access to each related list, or you can always click on the Related Tab in the page layout:

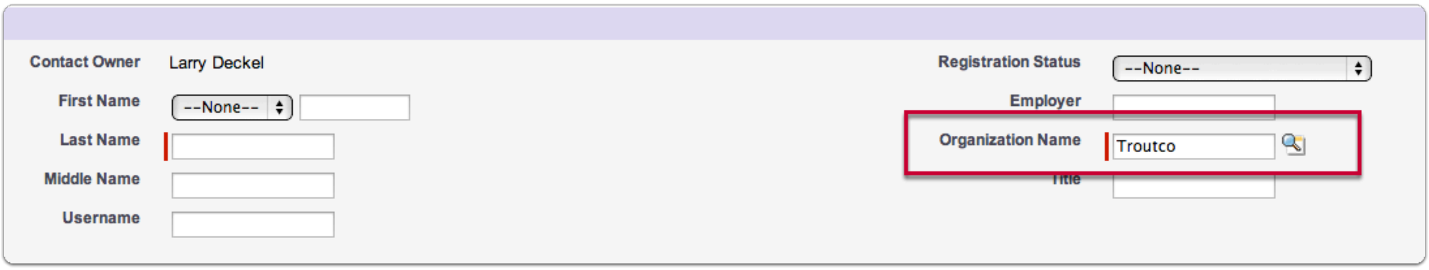


Adding a new contact from the organizational record

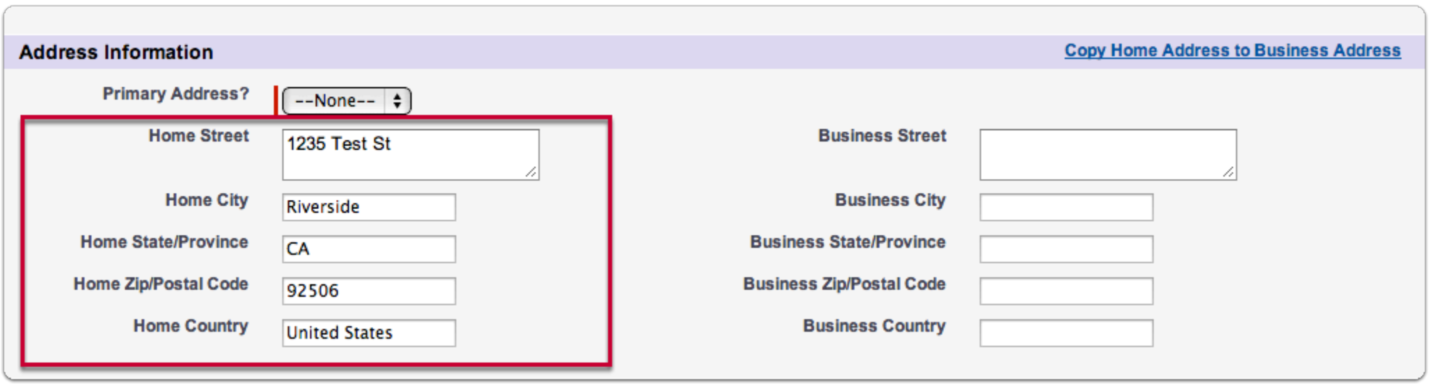
To create a new contact from the organizational record - click on the 'new' button in the contact related list in an organization's record



When you do this, the organization name is already pre-populated for you for the contact.



The address is brought over from the organization record too -- but not in the way you might expect. Here's why.



You'll be surprised to see that the address from the organization record is placed in the "Home Address" of the contact record, rather than the Business Address. That doesn't make sense, but here's why it happens:

In Salesforce (without HandsOn Connect), there aren't "Home" and "Business" addresses for contacts. Native Salesforce's two address fields are normally named "Mailing Address" and

"Other Address". In HandsOn Connect however, we've renamed these addresses to "Home Address" and "Business Address" as this is more useful in our nonprofit / volunteer way of thinking about contacts.

Salesforce however, when creating a contact from an organization record, automatically moves the organizational address into the first set of address fields in a contact record. (What it natively calls "mailing address" but we have renamed "Home Address".) There is no way for HandsOn Connect to override this native Salesforce Behavior and automatically populate this into the fields we've relabeled "Business Address".   But its easy to correct this little anomaly when you create a contact record this way.

Copy the Home Address to the Business Address fields by using the link in this section "Copy home address to business Address"

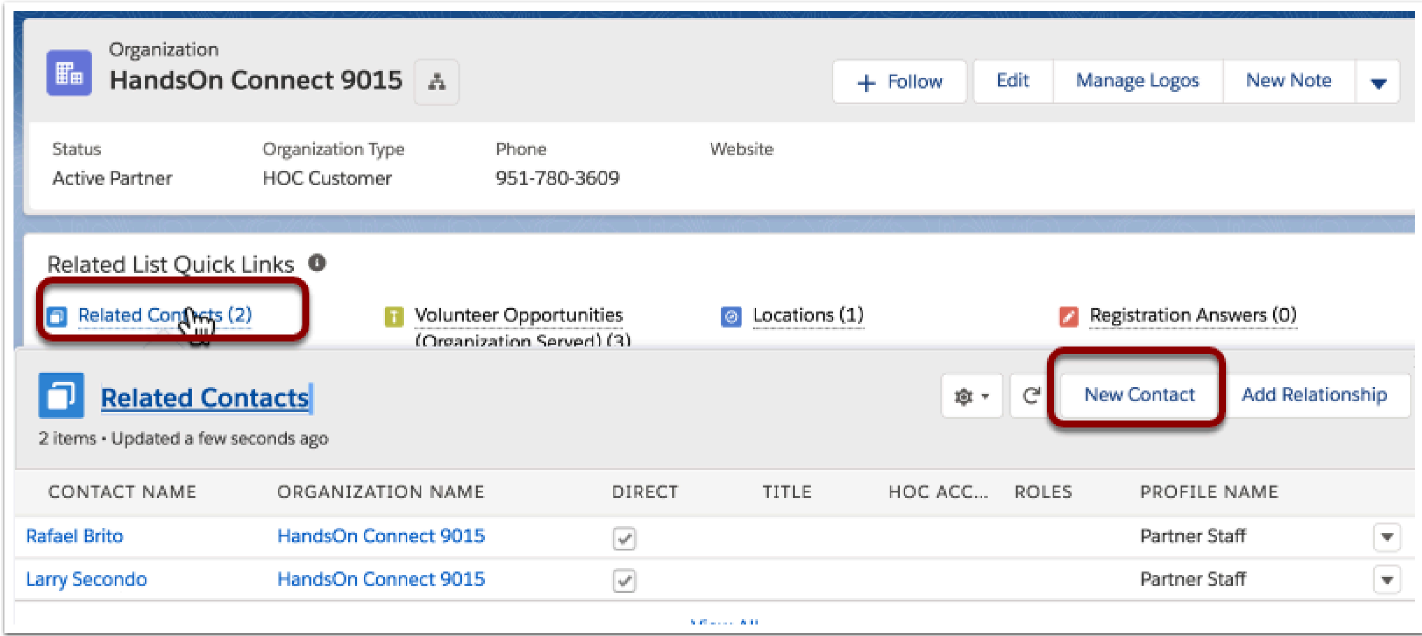
Clicking on this link takes the contents of the 'home address' fields, and copies them to the business Address fields for you with one click. Don't forget to set the required "Primary Address?" field to "Business".

If you know the correct home address of the contact you can update the home addresses.

If you don't know the home address you can either delete the content of those fields, or you can leave them as is. There's no harm in having the same address as home and business if you don't know a separate home address for the contact.

(Later on, if you grant the contact a login of some kind -- they will probably update those home address fields for you on their own :-)

Salesforce Lightning ScreenShots



SF Lightning does not currently have the functionality to copy the 'home' address over to the Business Address fields -- so you'll have to manually input the business address if you want that field populated.

Social Contacts (Optional)

Social Contacts are a new feature in Salesforce as of Winter 2011. It is turned on by default for any salesforce customers who received their account after October 7, 2011.

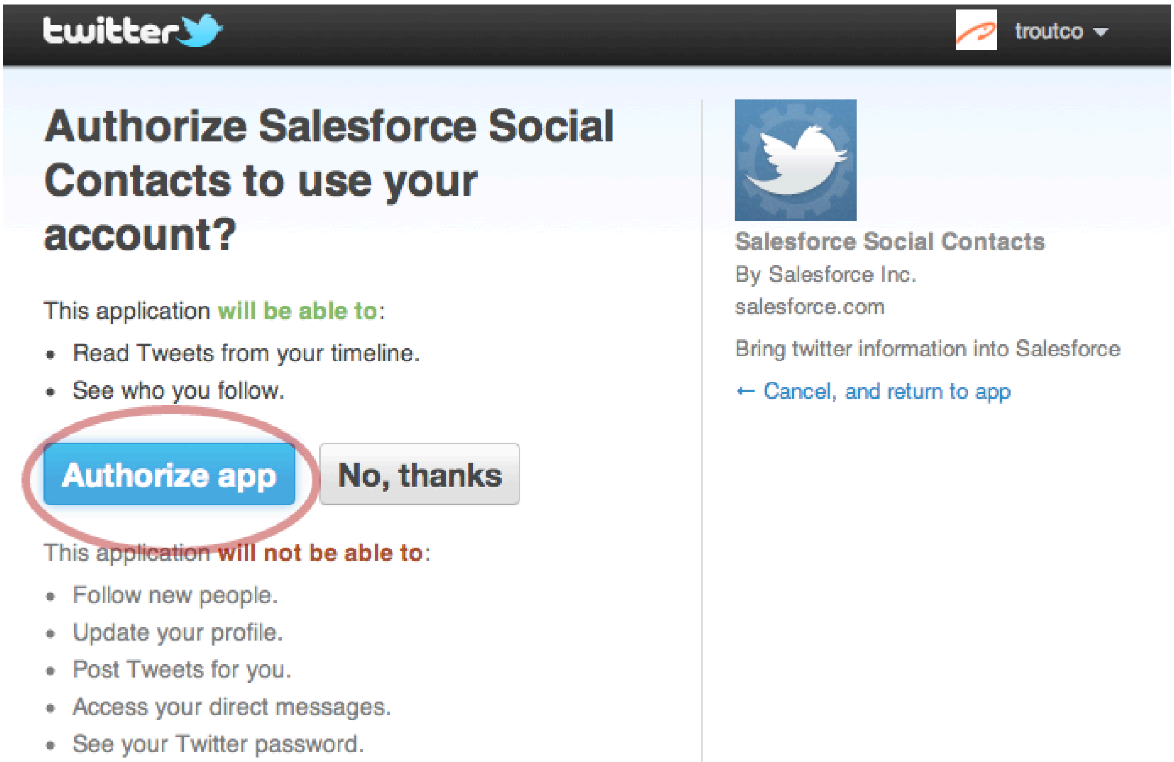
If it is not turned on in your instance, your system administrator must enable social contacts:

When it's enabled, In classic SF. you will seeicons for Twitter, Facebook, Klout and You Tube just below a contact's name.

If you wish to view social contact information for your contacts, you have to log into one or more of these networks using **your own** account on those social networks.

Click on the link for a network and you'll be asked to 'sign in' to **your** account in order to use that social network.

To get twitter information about contacts, click on the twitter tab, and click the 'sign in to twitter' link. You'll be prompted to authorize Salesforce Social Contacts to use your twitter account.

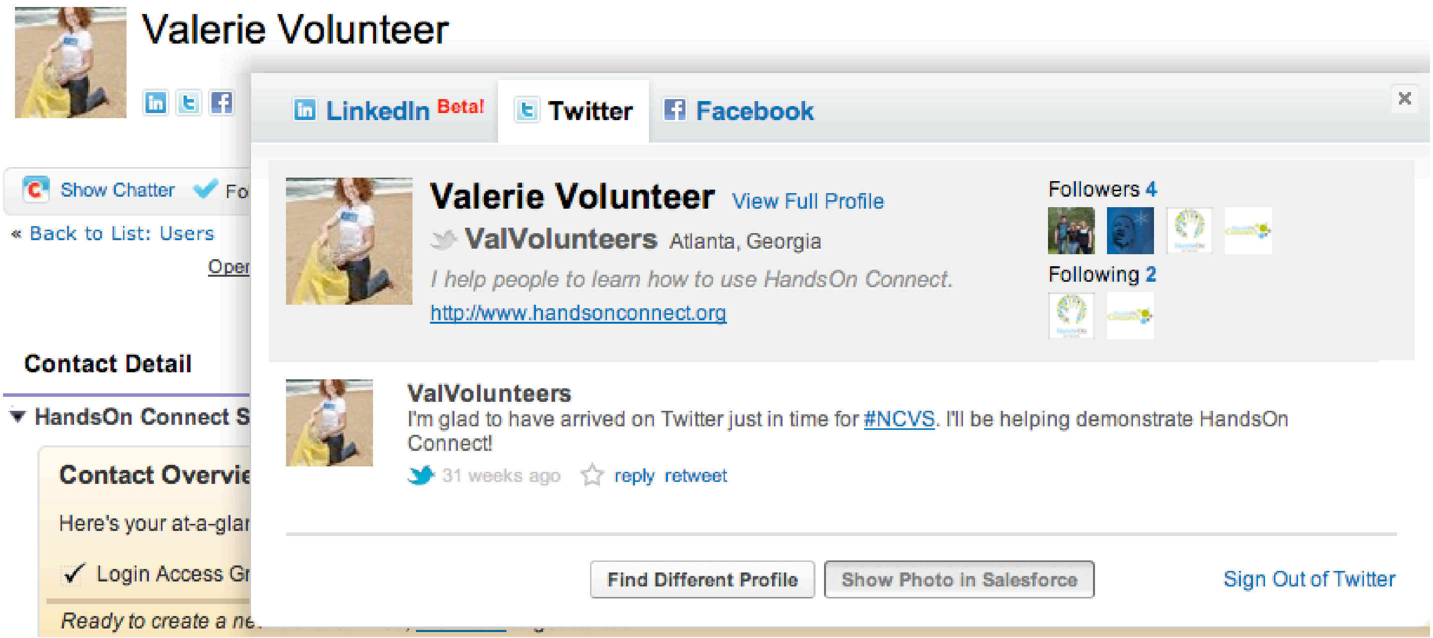


Click on Authorize App to enable your twitter access so that you can use twitter functionality from within salesforce.

Note: Only when you are logged in will salesforce give YOU access to the contact's twitter information.

Each Salesforce staff or administrative user needs to log in using their own social network credentials in order to use Social Contacts.

Once you are logged in:



When you are logged into one or all of these social networks, you'll have direct functionality to search for this contact and access any info they make available through that social network. In this case, I found Valerie Volunteer and can:

- View her full profile on twitter
- See her followers
- Display her photo (from twitter) in the contact record
- Read her tweets.
- Add her picture to your contact record.

You will remain logged in and able to access this information until you manually sign out of twitter. This keeps your access to this information constant, even if you log in and out of salesforce.

Facebook and Linked on work the same way - however you will be limited to the informatioin that would be available to you when logged in to those social networks. (i.e. you'll see more info for facebook users who you have a FRIEND relationship with, than those you have not friended -- all based on their personal privacy settings.

Social contacts are a good way to get additional information about your contacts based on what they share socially.

If Social Contacts are not enabled for your organization

Your system administrator must 'enable' the social contact feature in Salesforce. Here's how:

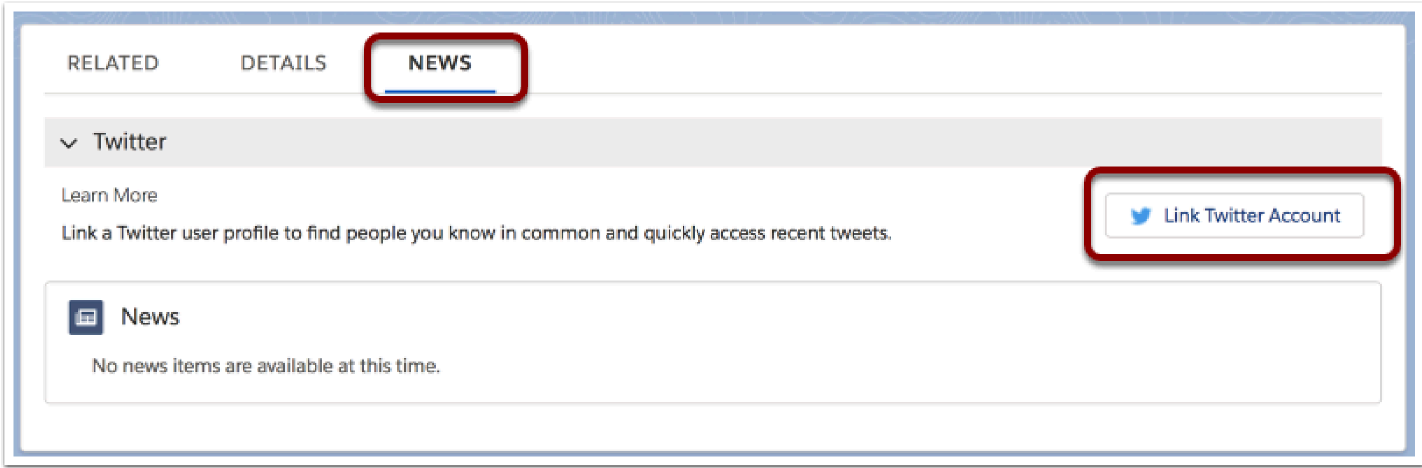
- Click ***Your Name*** | **Setup** | **Customize** | **Social Contacts** | **Settings**.

- Click **Change your organization's Social Contacts settings**.
- Select **Enable Social Contacts**. To disable Social Contacts for everyone, deselect this checkbox.
- Select the social networks that your organization may use. Deselect any of the services that you want to turn off for your organization. By default, all social networks are turned on.
- Click **Save**.

If you do not wish your organization to have access to social contacts, then the system administrator can disable this access.

Social Contacts in Lightning

Currently SF lightning only supports integration with Twitter.   To link a contact to their twitter account - go to the News Tab of the contact record and click on "Link Twitter Account"



Granting Contacts access to the public site and/or Sharing Portal

HandsOn Connect Profiles (Public Site and Sharing Portal Overview)

This article describes the different ways different contacts in your system access HandsOn Connect.

Administrative Users of Salesforce log into Salesforce administratively, and have access to what we call the 'back end' of HandsOn Connect which is Salesforce itself. These users have a Salesforce "User" record - which assigns them their Salesforce profile (usually System Administrator or Staff) which determines what permissions they have in Salesforce itself.

Everyone else who uses HandsOn Connect logs in through your public site, which looks like a regular website. These are your public site and sharing portal users.

Your HandsOn Connect Public Site

The Public Site is the site you've created using the CMS. When someone registers on the public site, they are usually granted a profile of "Volunteer" and have access to all the features of the public site.

Anyone can access your public site without logging in, but only people who have created an account and been granted a profile of Volunteer (or Volunteer Leader or Partner Staff) have access to parts of the public site that require you to be 'logged in'

Profile = Volunteer A contact with the profile "Volunteer" allows a contact to Login and access all the functionality in the Public Site.

Profiles for the Sharing Portal

The Public Site has another, less public section, which we call the Sharing Portal. The Sharing Portal gives access to manage volunteer opportunities. Access to the Sharing Portal is generally limited to contacts who have a profile of either Partner Staff or Volunteer Leader.

Contacts who have a profile of **Partner Staff** or **Volunteer Leader** log in via the public site (same as volunteers) but are then taken to the sharing Portal. (Note: They can also navigate back to the public site and use its functionality as well!)

The sharing portal provides SOME of the functionality that is available to administrative users of Salesforce.

What's the Difference between a Partner Staff Profile and a Volunteer Leader profile?

Both contacts with Partner Staff profile and Volunteer Leader profile have access to the sharing portal, but they have two differences:

1) **Permissions -** what a Partner Staff is able to do in the sharing portal is different than what a Volunteer Leader can do in the sharing portal. Within limits, we can customize HOC to determine what permissions each profile has. (Permissions refer to what objects the profile can Read, Edit or Create)

2) **Sharing -** what records (data) are accessible to the contact in the sharing portal is different for each profile.

Let's talk about the differences between the two sharing profiles:

Partner Staff Profile

The partner staff profile is designed to be used to give access to the staff of a partner organization so that they can create and manage volunteer opportunities for their organization.

Permissions: By default, Partner Staff have the ability to:

1. View, Edit and Create Volunteer Opportunities (Thes are always partner-managed opportunities managed by the account they are associated with)
2. View, Edit and Create Occurrences and Connections.
3. Report Attendance
4. View Contacts for volunteers who have an existing connection with their organization. (It is not recmmended to allow partners to create contacts as it would create duplicate contacts)
5. Update Organizational Information and contacts

6. View, Run and Export Reports. (if reports are enabled and shared by the System Administrator in the CMS)
7. Email volunteers
8. Print Check-In Sheets

Sharing Rules:

All partner staff of the same organization are able to see ALL partner managed volunteer opportunities and occurrences for their organization. (They do not see Affiliate-Managed opportunities, or any opportunities belonging to other organizations)

Partner Staff are able to see all connections to Opportunities managed by their organization.

Partner Staff afre able to View Contact records for only those contacts who have at least one connection with their organization.

Volunteer Leader Profile

The Volunteer Leader Profile is designed to allow a volunteer to serve as the Opportunity Coordinator for one or more opportunities, for one or more partner organizations. In a Volunteer Center model, Volunteer Leaders are generally trained by the Volunteer Center (Affiliate), and assigned as Opportunity Coordinator for affiliate-managed projects that serve their partner organizations.

It is also possible for a Volunteer Leader to serve as Opportunity Coordinator for a Partner Managed project (in case the partner wishes to have a volunteer manage the opportunity, but not have full access to all that organization's data).

Whenever a Volunteer Leader is assigned as Opportunity Coordinator, a connection is automatically created for them (since the assumption is that they are a volunteer and they should be credited with volunteer hours for leading the project).

Connections for Volunteer Leaders have the connection role set to: Volunteer Leader.

The main responsibilities of a Volunteer Leader is to be able to manage an occurrence they are leader for - and report attendance for those occurrences.

A Volunteer Leader can have access to selected occurrences of Opportunities managed by multiple organizations.

Permissions: by default, Volunteer Leader profile has the ability to:

1. View Volunteer Opportunities
2. View, Create and edit Occurrences and Connections
3. Report Attendance
4. View Contacts for volunteers who have an existing connection to an opportunity they served as leader to.
5. Email Volunteers
6. Print Check-In Sheets

The Volunteer Leader profile is NOT able to CREATE Volunteer Opportunities.
The Volunteer Leader profile does not have access to viewing Reports.

Sharing Rules:

Volunteer Leaders only see Occurrences of Opportunities that they are designated as Volunteer Leader for. They do not have access to other occurrences of the same opportunity. They only see the contacts of volunteers who have a connection to an opportunity they have served as leader for.

How are Profiles Assigned?

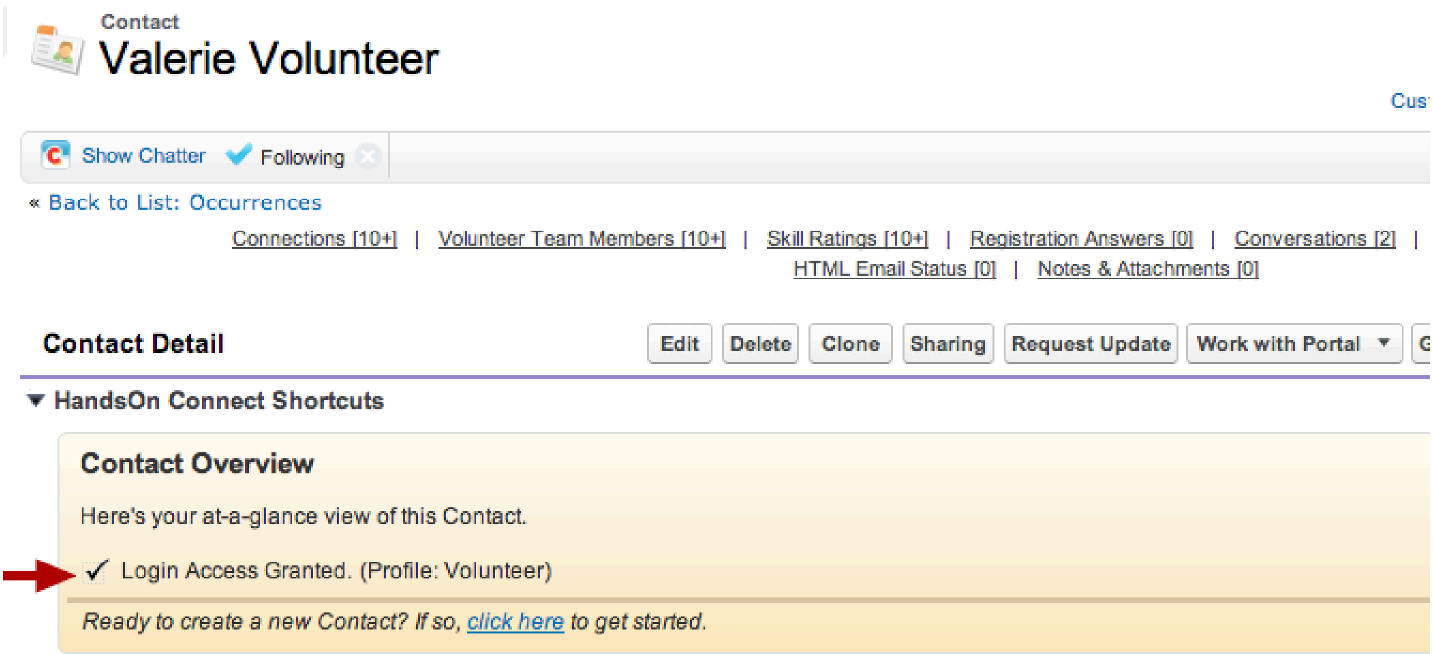
See the remainder of the articles in this chapter to learn how profiles of Volunteer, Volunteer Leader and Partner Staff are assigned to Contacts.

Granting a Contact Public Site Access as a Volunteer

Most volunteers will receive portal access and have their contact and user records created by registering on the public website.

However, there may be times where you've created a contact administratively and then want to create a volunteer account and login for them administratively.

In a contact record you can see whether a volunteer has been granted portal access



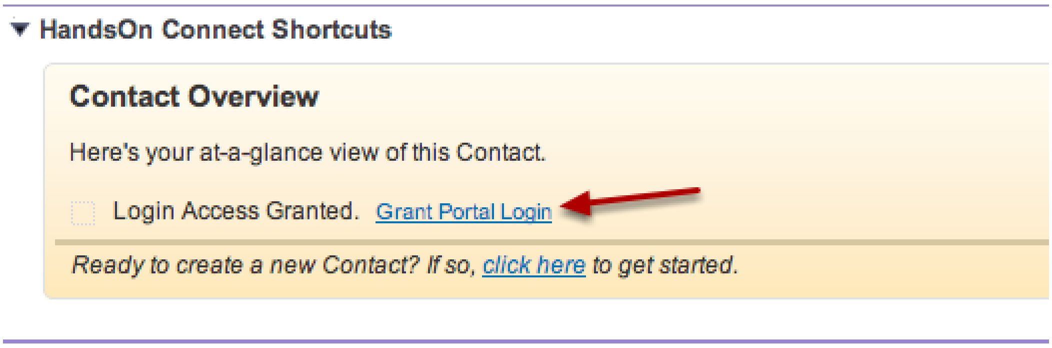
In the contact overview - a **checkbox** appears if login access has been granted (i.e. a User Record for this contact exists).

The profile here is listed as Volunteer. So we know they have access to the volunteer portal.

If the checkbox is NOT present next to "Login Access Granted" then you'll know they do not yet have a User Record and login access.

You can automatically create a User record, license and assign the volunteer profile to a contact by using the

shortcut link on the Contact Overview

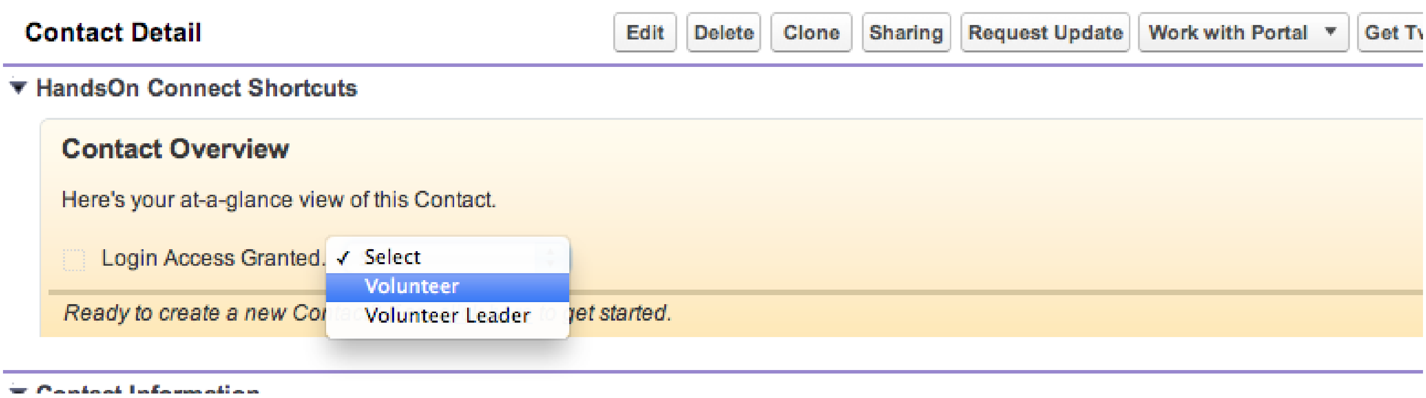


Click on "Grant Portal Login" in the Contact Overview dashboard in the HandsOn Connect Shortcuts section of the contact record.

Before you can grant portal access the following fields MUST be populated or you will get an alert saying required fields are missing.

- Primary Address
- Primary Phone
- Email
- Birthdate
- Volunteer Type: (must be set as "volunteer")

if these are not set - then you will get a warning that required fields are missing. Correct the fields, save the record and click on the Grant Portal Login link again.

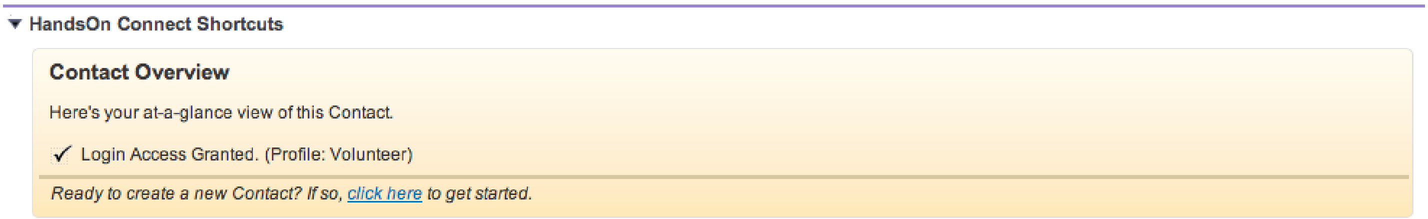


When you click on the link - a picklist will appear allowing you to grant them portal access as either a Volunteer or Volunteer Leader.

(*Note: If the organization for the contact is one of your active partner organizations, you'll also see an option to grant them "Partner Staff" access.)*

Select Volunteer.

Volunteer Profile login access is then granted!



Behind the scenes - a User record has now been created for this contact.

The system will send two emails to the contact notifying them that an account has been created for them. One notifies them. The other has login and password info.

HandsOn
CONNECT DEMO

Dear Adam Ant,

HandsOn Connect Demo has created a volunteer log-in account on your behalf at
http://demo.handsonconnect.org/.
An email with your log-in and password will be sent to you in a separate email.
Your access will allow you to:
- Signup for volunteer opportunities
- Update your Personal Information
- Create and manage teams of volunteers.

Thanks for your interest in volunteering!

The HandsOn Connect Demo Staff

Password notification email text

From: HandsOn Connect Demo <clientmanager@handsonconnect.org>
Subject: **[HandsOn Connect Demo] New User Login Information**
Date: February 1, 2011 6:14:15 PM PST
To: troutco+adam@gmail.com

Dear Adam Ant,

HandsOn Connect Demo has created a member account on your behalf at http://demo.handsonconnect.org/

Thank you,
The HandsOn Connect Demo staff.

Your login and password information is below.

Username: troutco+adam@gmail.com
Password: 0ApzqX0JA

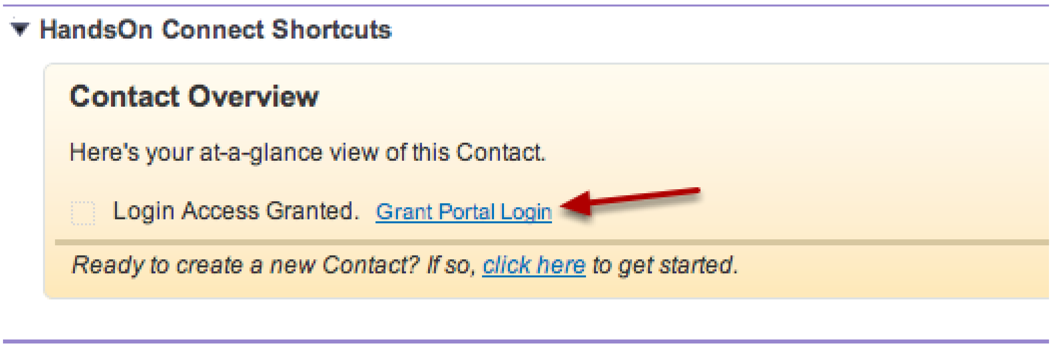
When they log in with the temporary password in this email, they will be asked to create a new password for their account. They will then have full access to the volunteer portal.

Granting Portal Access to a Volunteer Leader

If a contact already has login access in some other role (Volunteer, Partner Staff) you'll first have to disable their current license before you can change them to a Volunteer Leader profile.

If they have no access, you can skip that step and simply grant them access directly as shown below.

If no license is associated with the contact, you'll see a Grant Portal Login link in the Contact overview.



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Before you can grant portal access the following fields MUST be populated or you will get an alert saying required fields are missing.

- Primary Address
- Primary Phone
- Email
- Birthdate
- Volunteer Type: (must be set as "volunteer")

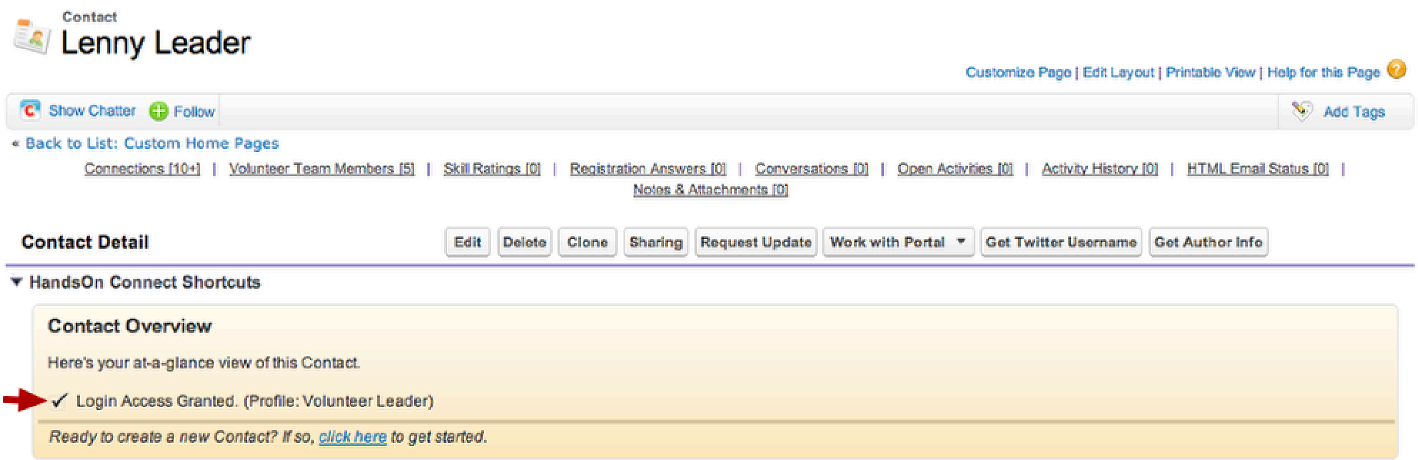
if these are not set - then you will get a warning that required fields are missing. Correct the fields, save the record and click on the Grant Portal Login link again.

Select Volunteer Leader from the picklist

Once you select volunteer leader, the user license will be granted and email notification and login/ password info will be sent to the contact letting them know they now have access as a Volunteer Leader.

Basic Portal Users: The profile you will select will be labeled Volunteer Leader v2.

Volunteer Leader Profile login access is granted!



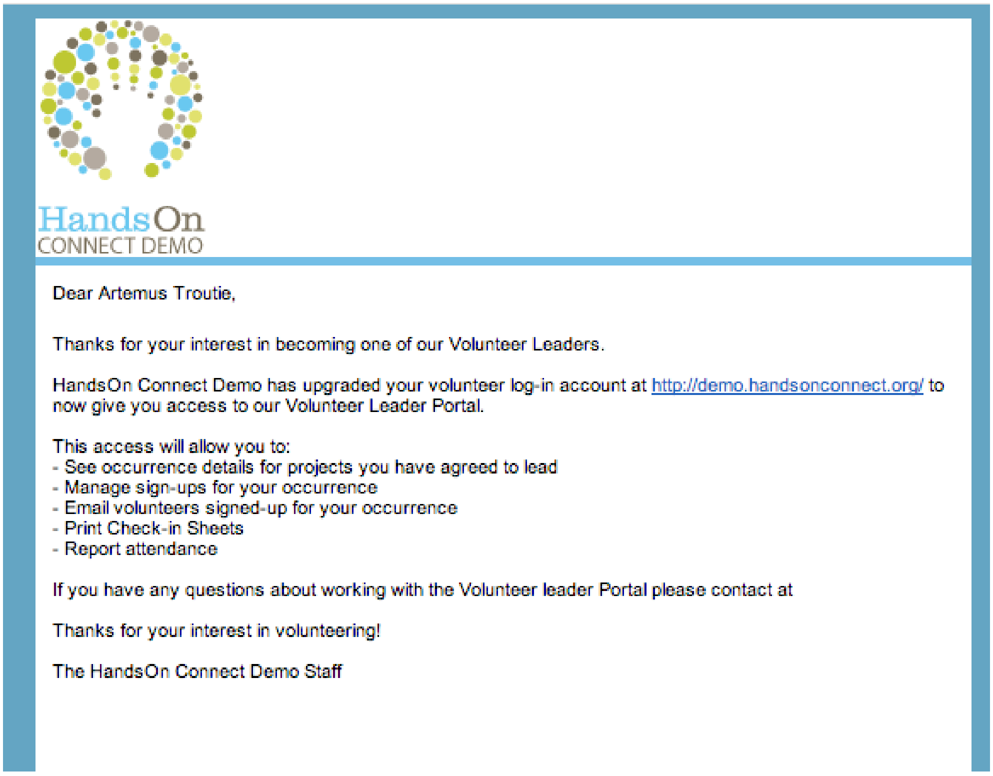
The checkmark appears and you'll see the profile now associated with this contact is Volunteer Leader.

The volunteer will be sent an email letting them know they have been granted Volunteer Leader portal access. They will also get an email with a new temporary password which they'll have to use before they can log in again. Their username will not change!

NOTE: Before granting Volunteer Leader portal access to a volunteer -- be sure that you have trained them or provided them with documentation on how to use the Volunteer Leader portal. It is not self-explanatory unless you've customized the portal with documentation or an instruction video on the portal homepage. So don't grant access to someone who has no idea what to do in the portal! :-)

Basic Portal Users: The profile that will appear here is listed as Volunteer Leader v2 once you've granted them access to the VL basic portal.

When Volunteer Leader Portal access is granted, two emails will be sent to the contact by the system


HandsOn CONNECT DEMO

Dear Artemus Troutie,

Thanks for your interest in becoming one of our Volunteer Leaders.

HandsOn Connect Demo has upgraded your volunteer log-in account at http://demo.handsonconnect.org/ to now give you access to our Volunteer Leader Portal.

This access will allow you to:
- See occurrence details for projects you have agreed to lead
- Manage sign-ups for your occurrence
- Email volunteers signed-up for your occurrence
- Print Check-in Sheets
- Report attendance

If you have any questions about working with the Volunteer leader Portal please contact at

Thanks for your interest in volunteering!

The HandsOn Connect Demo Staff

The first email notifies the volunteer that they have been upgraded to Volunteer Leader status and have access to that portal. (Note: the default template says 'upgraded" but this same email will be sent if you create the Volunteer Leader from a contact record that never had a login as a volunteer. So you may want to customize the email template if you regularly create volunteer leaders from scratch administratively.

> Dear Artemus Troutie,
>
> HandsOn Connect Demo has created a member account on your behalf at http://demo.handsonconnect.org/
>
> Thank you,
> The HandsOn Connect Demo staff.
>
> Your login and password information is below.
>
> Username: troutco+training_partner5@gmail.com
> Password: Pm4vu

The second email is the standard Salesforce notification that a login has been created. When logging in with the temporary password the user will be prompted to set a new password.

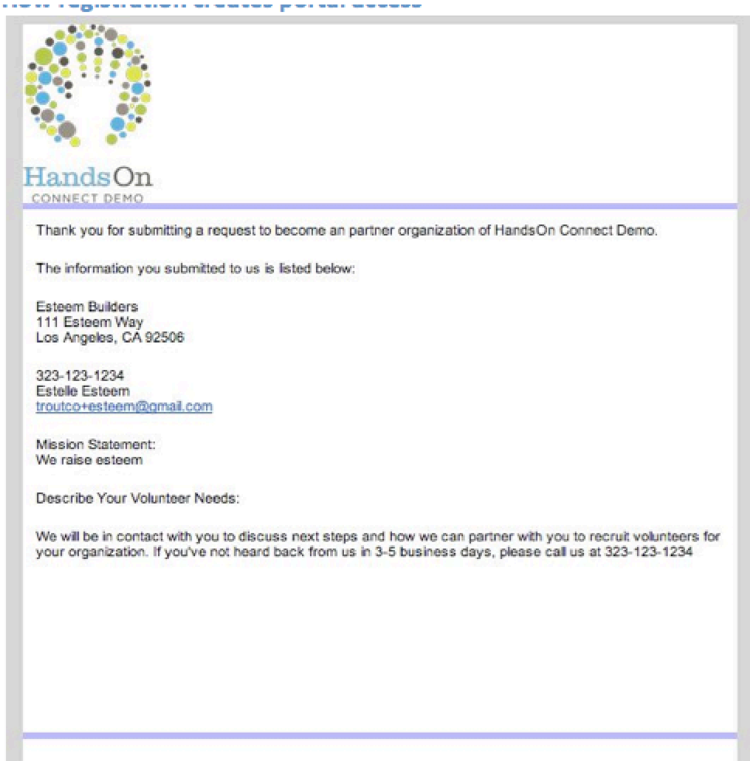
Granting Portal Access to Partner Staff who have registered their organization via the public site

Having an organization register on the public site is the easiest way to initiate the process of granting portal access to contacts at a partner organization. This lesson describes what the process is like when the partner signs up via the Organization Sign Up page.

You may find it easier for even your staff and administrators to enter partner organizations in this way, as it automatically creates both the organization and a contact (or two) for the organization, and ensures that all required fields necessary to grant them portal access are completed.

When an organization registers on the public site, contacts are created for their **Organization** and for their Primary **Contact** and a **Volunteer Coordinator** (if they specified one). All required fields are automatically populated. An email notification is sent to the partner notifying them you are reviewing their application.

This email is sent to the person who submits an application to become a partner on your public site:



HandsOn
CONNECT DEMO

Thank you for submitting a request to become an partner organization of HandsOn Connect Demo.

The information you submitted to us is listed below:

Esteem Builders
111 Esteem Way
Los Angeles, CA 92506

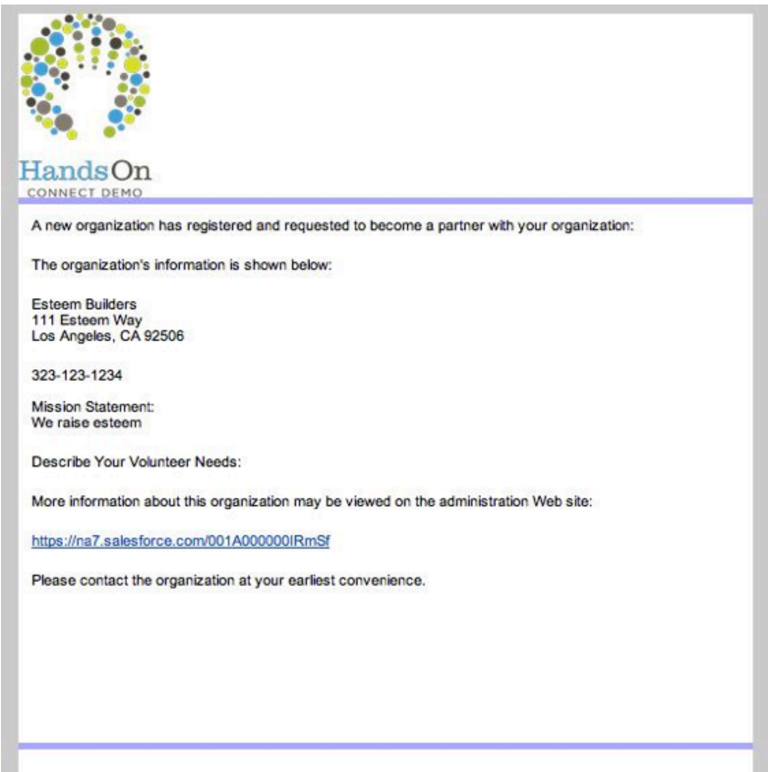
323-123-1234
Estelle Esteem
troutco+esteem@gmail.com

Mission Statement:
We raise esteem

Describe Your Volunteer Needs:

We will be in contact with you to discuss next steps and how we can partner with you to recruit volunteers for your organization. If you've not heard back from us in 3-5 business days, please call us at 323-123-1234

When the application is submitted, your **Partner Approval Manager** receives an email notification and a Task is created for them on their admin home page reminding them that a partner is awaiting review and approval.


HandsOn CONNECT DEMO

A new organization has registered and requested to become a partner with your organization:

The organization's information is shown below:

Esteem Builders
111 Esteem Way
Los Angeles, CA 92506

323-123-1234

Mission Statement:
We raise esteem

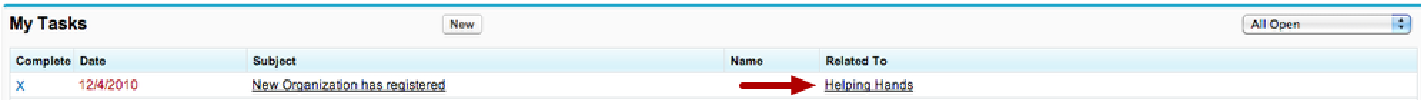
Describe Your Volunteer Needs:

More information about this organization may be viewed on the administration Web site:

https://na7.salesforce.com/001A000000IRmSf

Please contact the organization at your earliest convenience.

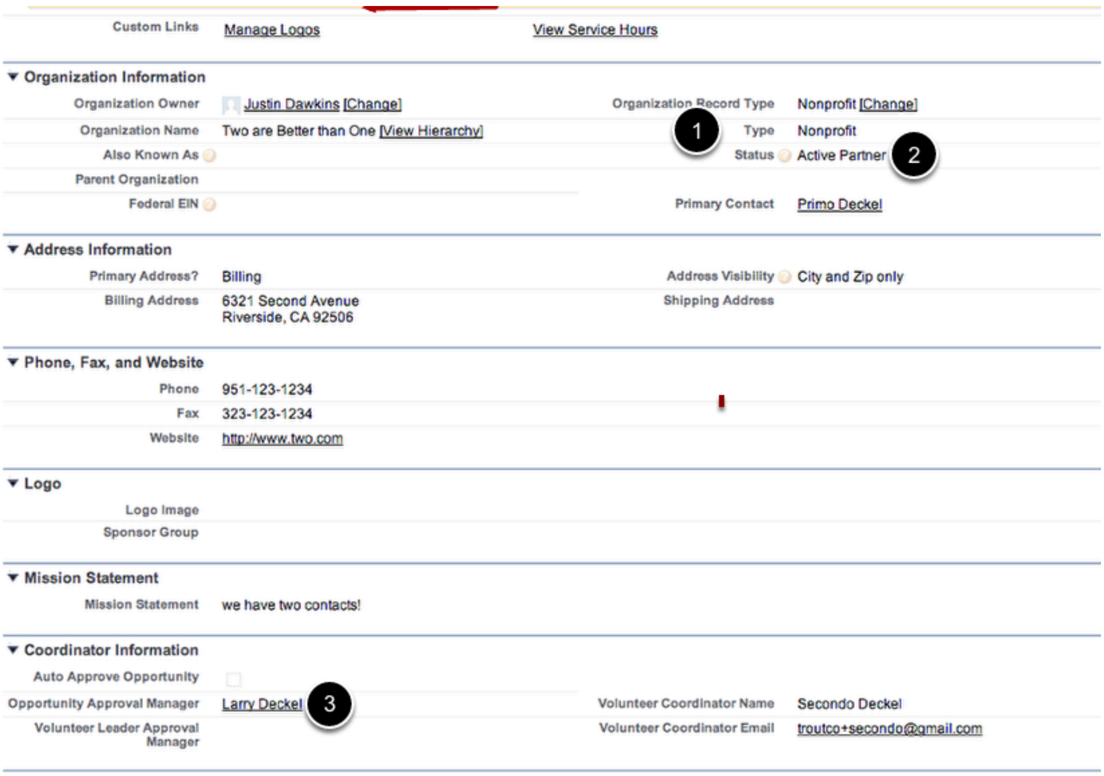
The task on your partner approval's home page looks like this.


My Tasks New All Open

Complete	Date	Subject	Name	Related To
X	12/4/2010	New Organization has registered		Helping Hands

You can click on the link to the organization name and be taken directly to the organizational record you need to review.

There are three fields to update before granting portal access to a partner organization:



What business processes your organization uses **before** granting portal access and making an organization a full partner are up to you, but you can use email templates, tasks and events to manage that process. When it is complete, you'll need to update the organization record before granting portal access to its contacts through their contact records.

Before Granting partner portal access to an organization's contacts, you must update three fields in the organization record

1. Choose the correct type of organization in the **Type** field

2. Change the status of the organization from pending to **Active Partner.**

3. Specify who in your organization will approve opportunities submitted for posting from this partner. Populate this in the "**Opportunity Approval Manager**" field.

(It you only have one Opportunity Approval Manager - this may be automatically filled in for you!)

You can add any other detail to the organization record, but these three fields are mandatory before granting portal access.

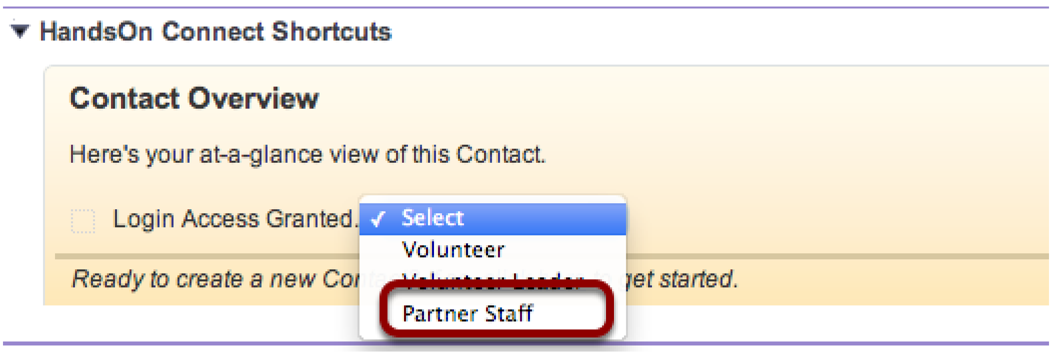
NOTE: Be sure to train your partner contact on using the portal before granting them access. Using the portal is not self-explanatory!

If you've administratively created this account, you'll need to also fill in the field "Primary Contact" and save the record, before you can change them to an active partner. (This is automatically populated for you when the organization registers themselves via the public site).

Note: This is the procedure for HandsOn Connect instances in the 'standard configuration". (Unless you've been informed you are in the 'Flex" configuration, you are in the HOC Standard Configuration.

If your organization is in the 'Flex Configuration" see this article on granting partner staff access as its handled differently in the flex configuration.

Now go to the contact record of each contact associated with the organization you wish to grant portal access to.



Generally, you will be granting access to the primary contact of the organization, and perhaps to a Volunteer Coordinator if they named a second person during the application process.

Clicking on the "Grant Portal Login" link for a contact that is associated with an organization that is an Active Partner - will give you the option of granting them "Partner Staff" profile and license. This enables you to add as many contacts as needed with access to a partner's portal.

When a partner staff portal license has been granted - the contact(s) will receive an email with instructions on logging in and a temporary password. When they first log-in they will be asked to reset their password and then they will be logged into the Partner Portal.

When you grant portal access for the contacts in a partner organization they receive one (or two) emails

The First email is the email template "Organization Registration Activation". This email notifies them that you have approved their application and granted them partner login status. You can optionally edit this email template and add information about how to get trained on using the portal, etc.


Dear {!Contact.Name},

You have been granted access to the Partner Portal with {!Organization.Name}. If you've not previously created a member account on our site, an email with your log in information and a link to set your password will be sent to you in a separate email.

If you already have an active login and password for our site it will remain the same but when you log in you'll be taken to the partner portal.

As an approved user representing {!Account.Name}, you now will be able to submit opportunities that will appear on our opportunity search engine and on our opportunity calendar.

Your access will allow you to:
- Update your organizational information
- Submit new opportunities
- Edit existing opportunities
- View volunteer sign-ups
- Approve and schedule volunteers who have expressed interest in opportunities that do not permit immediate sign-up
- Email volunteers
- Report attendance and service hours
- and more.

To log in to the organization portal, go to:
{!Contact.HOC__HOC_Domain_Name__c}

We look forward to working with you!

The {!Organization.Name} Staff

They may also receive a second email with instructions on setting a password for their account.

Note: If they already had an account as a volunteer or volunteer leader, they will not receive an email asking them to set a password. Their previous login password will still be in affect.

Granting one contact partner staff access to manage multiple organizations in sharing portal

For HOC customers using the March 2018 release or later - its possible for one contact to be given access to the sharing portal for multiple organizations.

In order to use this advanced feature your system administrator must first add a related list to the contact page layout and one to the account page layout. See this post for instructions on Enabling ability for one contact to serve as partner staff for multiple organizations.

Note: Once a contact is granted partner staff access for multiple organizations, they will log into the sharing portal to create opportunities for each organization they manage.

On the administrative side, Salesforce administrators will only be able to assign this contact as Opportunity Coordinator for the organization they have a 'direct' relationship to.

In order to administratively make someone a volunteer coordinator for one of their other 'related' organizations, you should log into the sharing portal as this contact, and you can then create the opportunity directly in the sharing portal with this person as opportunity coordinator.

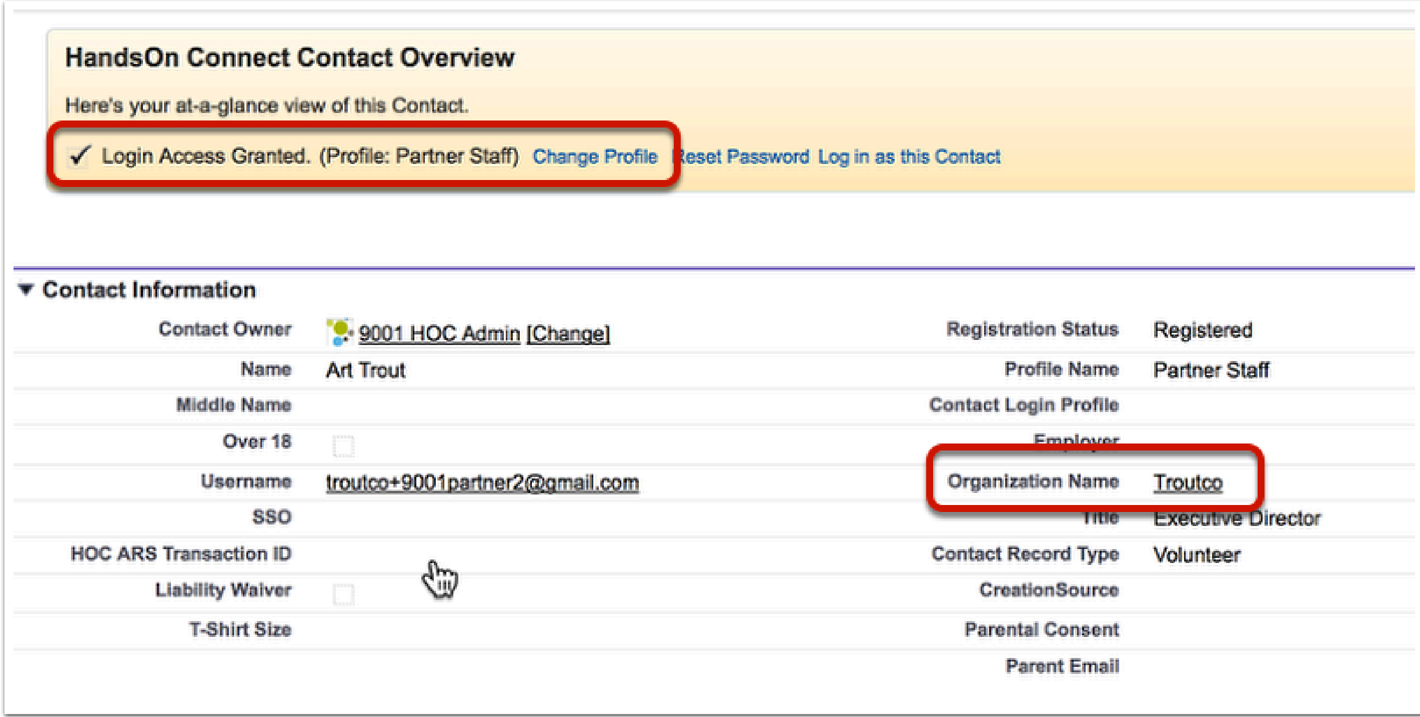
Note: This is the procedure for HandsOn Connect instances in the 'standard configuration". (Unless you've been informed you are in the 'Flex" configuration, you are in the HOC Standard Configuration.

If your organization is in the 'Flex Configuration" see this article on granting partner staff access.

The initial procedure for granting partner portal access to a contact

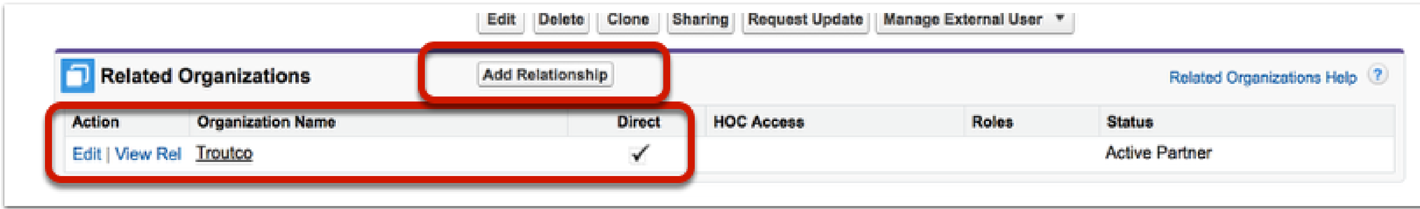
In HOC 3.0 -- A contact's Main Organization is the one that corresponds with the Organization Name in their contact record. They are granted partner staff access by clicking on "Change Profile" and at that time they have access to the sharing portal to manage that organization.

In the screenshot below, Art Trout has partner staff access for the Organization Troutco.



How this appears in the new Related Organizations related list:

In the new related list "related organizations' in the contact record, we see that Art Trout has a relationship with the organization Troutco. The checkmark next to "Direct" tells us this is his main organization (the one he is an employee at generally). He already has partner staff access to this organization because its his principal organization and he has the profile partner staff.



How to add an additional organization that a contact can access in the sharing portal:

You use the related organizations related list to add additional organizations that Art can access and manage in the sharing portal. Here's how to do this:

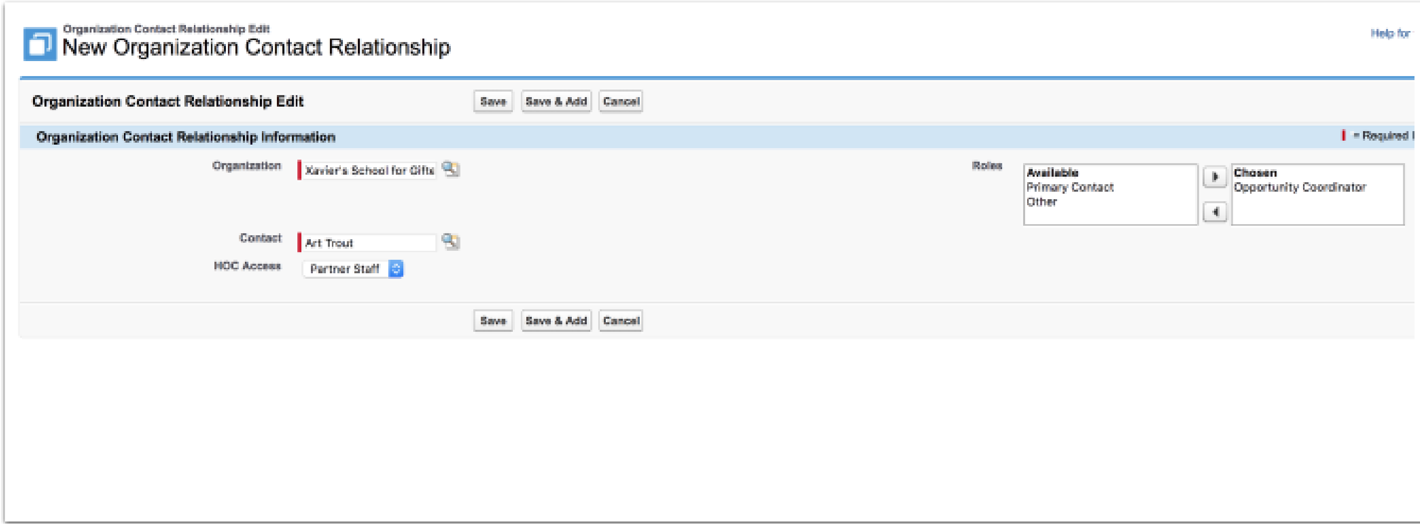
1) Click on the "Add Relationship" button. This will open a New Organization Contact Relationship record

2) Choose another active partner organization you wish Art to be able to manage.

3) Set the value of HOC Access to "Partner Staff"

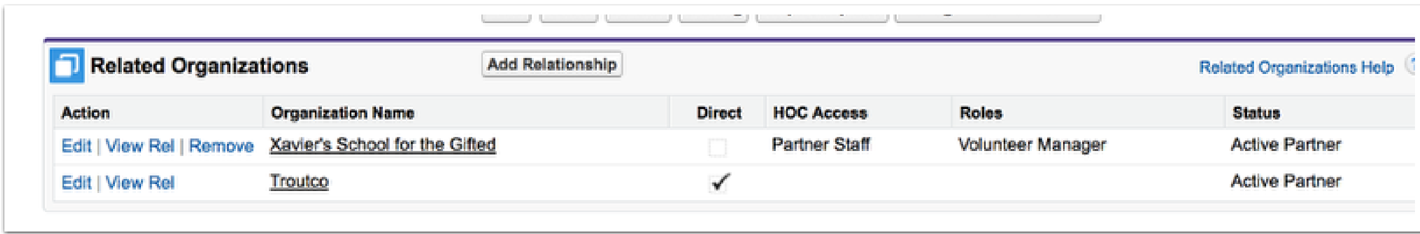
4) Save the Record.

Note: The field 'roles' is entirely optional - but can be customized and used to keep track of the relationship detail that this contact has with this other organization. In this example we have customized the picklist values in the roles field and added the value "Opportunity Coordinator" and "Primary Contact" - so we will keep track of the fact that Art's relationship to Xavier's School is he is an opportunity coordinator for them. .



The related list will now show two organizations that Art can manage:

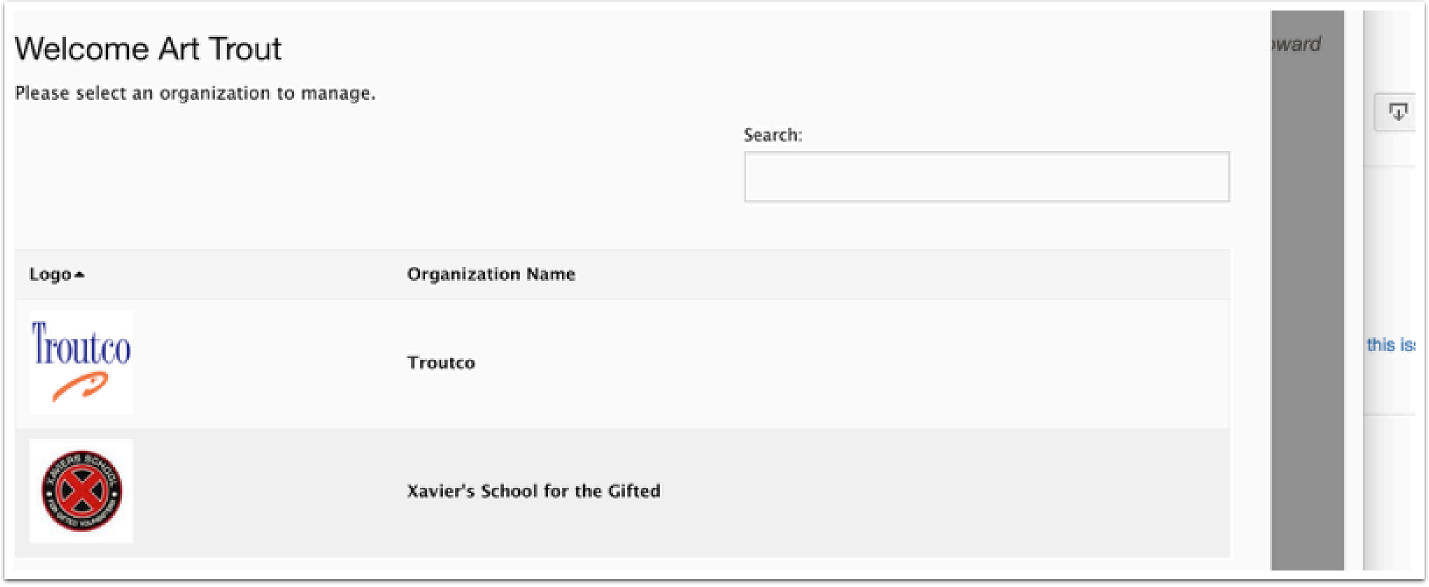
He is a direct contact for Troutco (it isn't necessary that he be granted HOC Access for his main organization), but he has also been granted Access as Partner Staff to "Xaviers School...." He is now able to manage both organizations. In the next step we'll show you how!



How a contact with multiple organizations selects which organization to manage

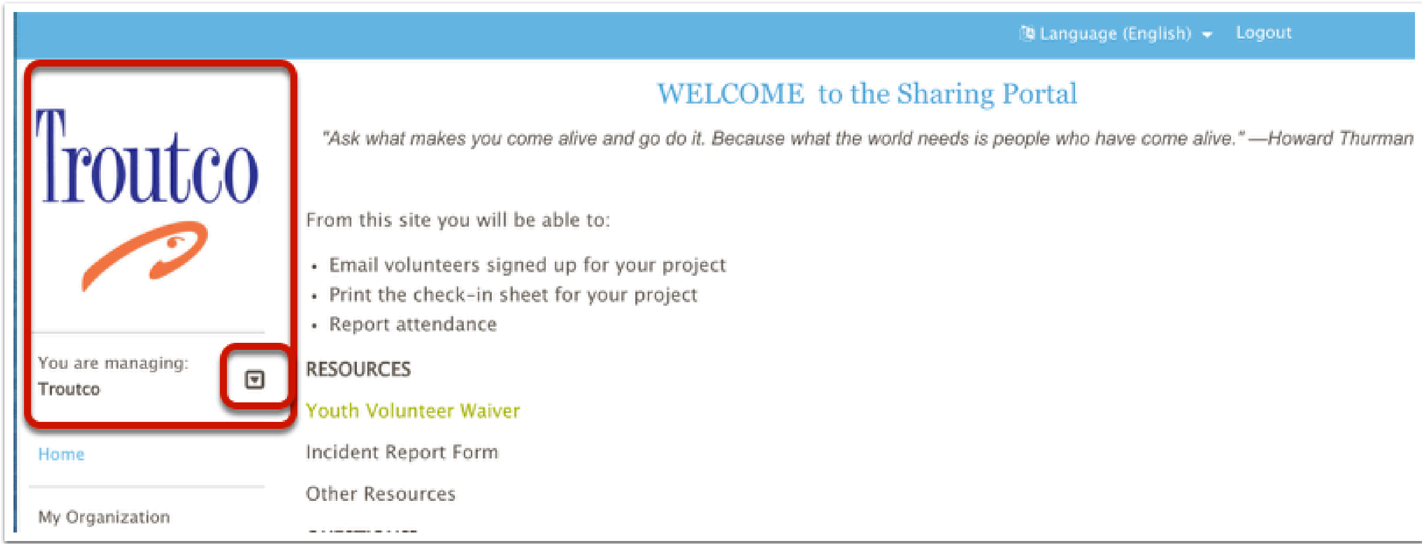
When Art logs in to the sharing portal, he's given a welcome screen which allows him to choose which organization he wishes to manage.

He can choose either organization:



Once logged into an organization - he is able to manage that organization. Only that one organizations volunteer opportunities, connections, contacts etc will be accessible to him at one time.

He can see which organization he is currently managing on the left sidebar. The organization logo also appears:



To switch organizations, he just needs to click on the picklist dropdown to the right of the organization name. Doing so will reopen the organization selector screen and he can quickly switch to any other organization he has access to manage, without logging out and starting over.

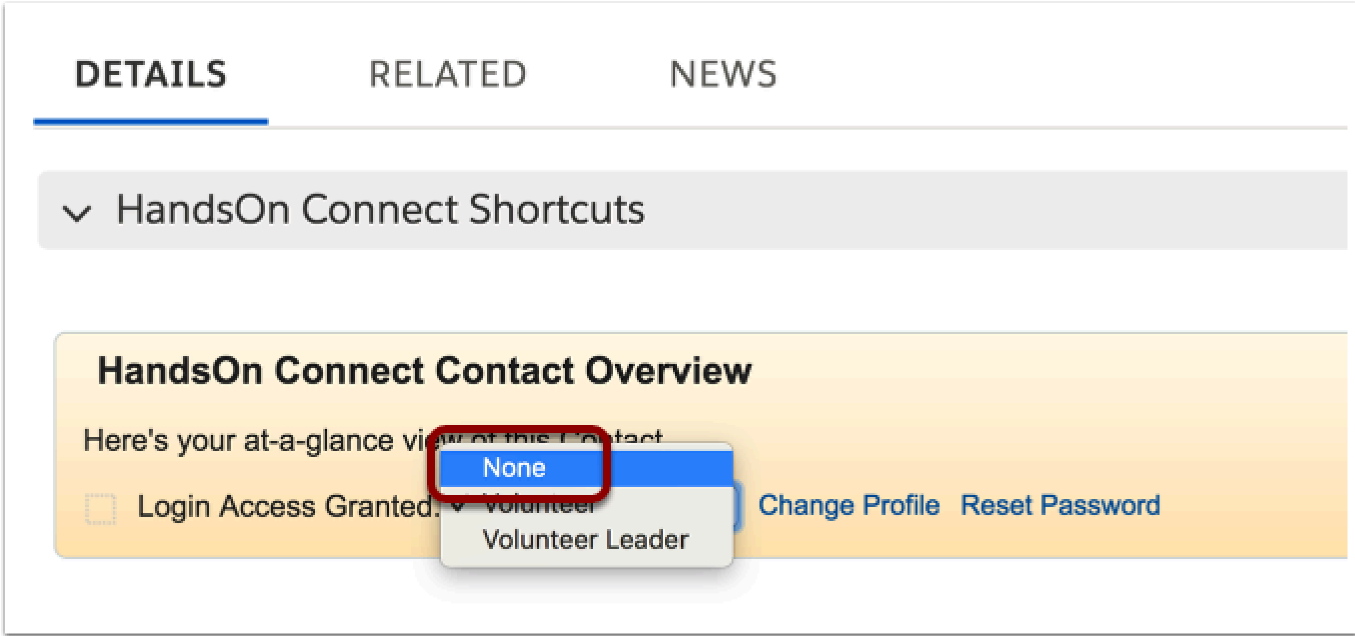
Each organizations data is kept separate and not co-mingled across multiple organizations. But the user can quickly shift between any number of organizations they have access to manage.

Removing a Contact's access to log in

To remove someone's volunteer (or any other) profile, click on the 'change profile' link in the **HandsOn Connect Contact Overview -** and select "None" as the profile.

If you then refresh the page, you'll notice the check mark saying login access granted will no longer be visible.

This will remove the user license, and they will not be able to log in with that email address.



If someone is no longer volunteering with your organization (or leaves a partner organization), you'll generally want to remove their ability to log in and have access as they had before.

If you are doing this to prevent a volunteer from using the site and signing up for opportunities, keep in mind that this wouldn't stop them from registering again to use the site if they chose to. It just removes their current access.

HandsOn Connect Flex Configuration (Advanced)

What is the HOC Flex Configuration?

As of March, 2018 - HandsOn Connect is available in two configurations.

All existing customers are in what is now referred to as the **HOC Standard Configuration.**

As of March, 2018 - some new customers are receiving HandsOn Connect in the new **HOC Flex Configuration.** The Flex Configuration makes it possible for organizations using Salesforce with multiple record types for accounts and contacts to more flexibly use HandsOn Connect to meet their business requirements, while not interfering with their current business practices.

This article will describe the principal differences between the Standard and new Flex Configuration.

What are characteristics of the HOC Standard Configuration?

The following behaviors in Salesforce are the norms of the HOC standard configuration:

- Organizations who register via the public site are given the organization record type "Nonprofit"
- Contacts who register via the public site are given the contact record type "Volunteer"
- Contacts can only be granted partner staff access to organizations that meet the following requirements

1. The organization must be of record type 'nonprofit'
2. The organization must have a primary contact associated to it.
3. The organization must be in status = active partner.

- Partner Staff Access is initially granted to a contact by using the Contact record's "Contact Overview" as described in this article.

What are characteristics of the HOC Flex Configuration?

In the Flex Configuration, HandsOn Connect permits the following:

1. A contact can be granted partner staff access to create and manage volunteer opportunities for organizations of any record type. (This is useful if you are going to have business accounts posting volunteer opportunities, or in the higher education market, academic

departments, sports teams and other organizational record types may be posting and managing volunteer opportunities.
2. Partner Staff Access is not granted via the Contact record's "Contact Overview" component. Partner staff access is granted and managed through Account Contact Relationships. See this article for a description of how to grant partner staff access in the Flex Configuration

There are also additional options that can be configured when HOC is in the Flex Configuration. These can be set as part of a client's flex configuration upon request if they meet a specific business need.

1. Do not create contacts with record type = volunteer. (This option is useful if, for example, your volunteers are going to be students and you have already defined a 'student' record type for contacts.
2. Do not create organizations with record type - nonprofit. If your partner organizations are going to be something other than nonprofits -- the flex configuration can be set up to use a different default organization record type.
3. Do not require a primary contact for an organization in order to grant a contact access to manage that organization. (This setting also makes it possible to no longer require a Primary Contact on the organization registration form.
4. Do not require an organization to have the status "Active Partner" in order to grant a contact access to manage it.

The purpose of the HOC Flex Configuration is to provide greater flexibility to organizations using Salesforce for more than just Volunteer Management. The Flex Configuration, for example:

- Makes it possible for an organization using the NonProfit Success Pack, to remain entirely in the household model, as it removes the requirement that a contact must have a direct relationship with a nonprofit account.
- Makes it possible for organizations using Salesforce's HEDA application, to manage volunteers across a variety of academic organization types.

If you are an existing HOC customer who has a need to to be moved to the new Flex Configuration beta -- please open a help center ticket and let us know.

Granting Partner Staff Access to Contact (HOC Flex Configuration)

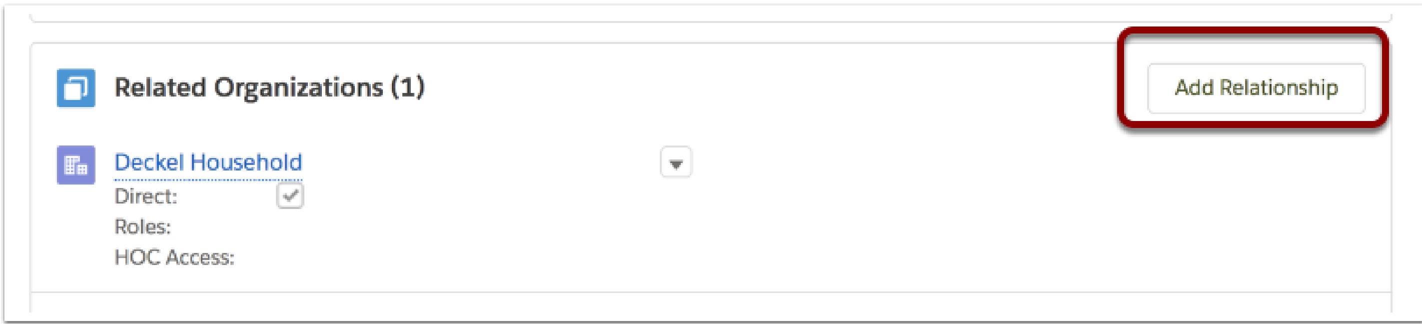
In The HOC Flex Configuration Partner Staff Access is granted in a different manner than the HOC Standard Configuration.

In HOC Flex Configuration - any contact can be granted partner staff access for any organization. This means a single contact can be granted "Partner Staff" sharing portal access to multiple organizations.

This article show how Partner Staff Access is granted in Salesforce's Lightning environment. The process remains the same if you're using Salesforce Classic - but the page layouts will look different than the illustrations in this article.

Partner Staff Access is granted via the Account Contact Relationship object

1) Go to a Contact record and look for the related list "Related Organizations". Click on "Add Relationship"

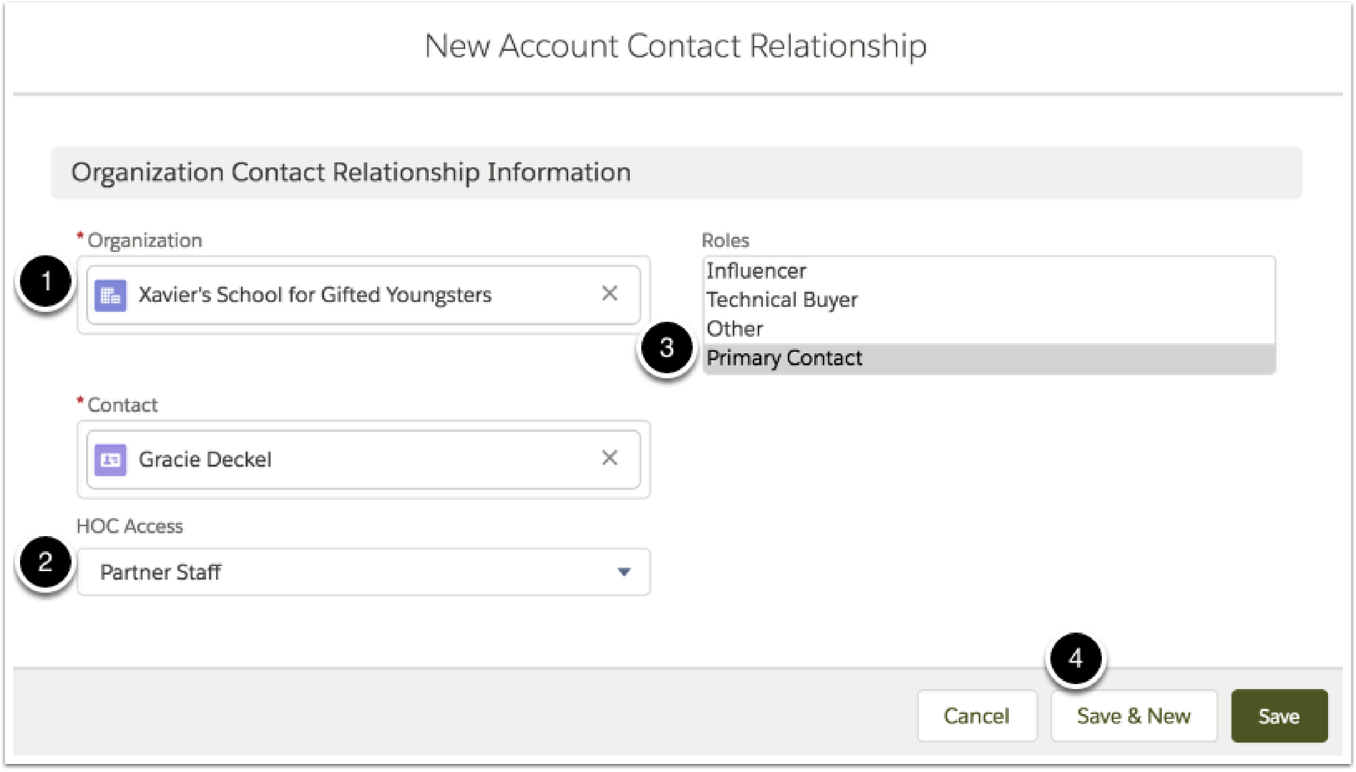


If in your instance of Salesforce Accounts hasn't been renamed to Organizations -- the related list may be called "Related Accounts"

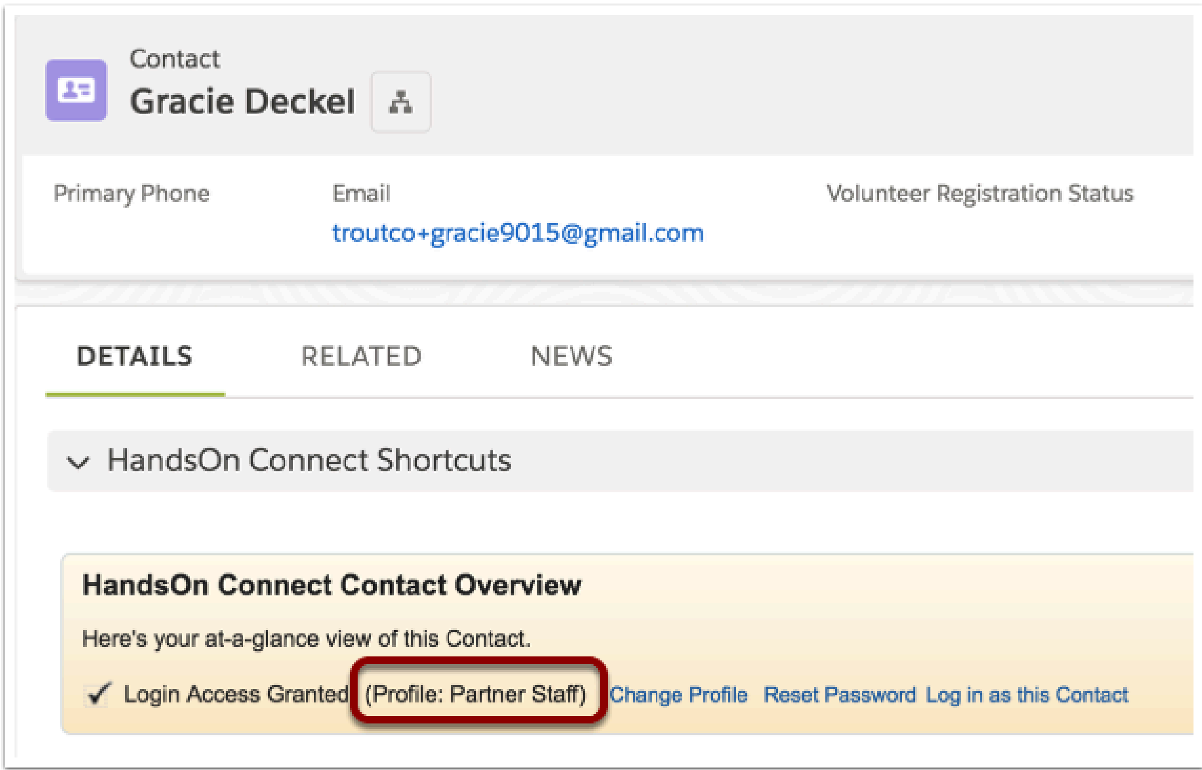
2. Select the Organization you wish the contact to be able to manage, and then set the value of the field HOC Access to "Partner Staff".

You can optionally assign a role to the relationship (such as "Primary Contact" or "Opportunity Coordinator" or any other values you wish to add to the roles picklist

Save the Relationship



3. Refresh the contact record and you'll see in the HandsOn Connect Contact Overview tab that the contact now has a profile of Partner Staff.

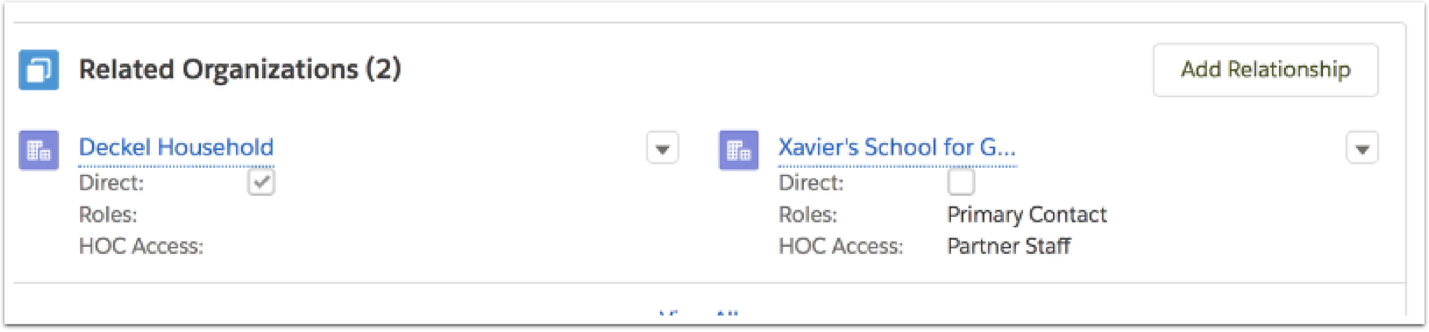


You can grant this contact access to manage additional organizations by adding additional Organization Contact

Relationship records.

You can also add relationships *without* granting partner staff access. Only relationships where the HOC Access field has a value of "Partner Staff" will give them access to manage that organization.

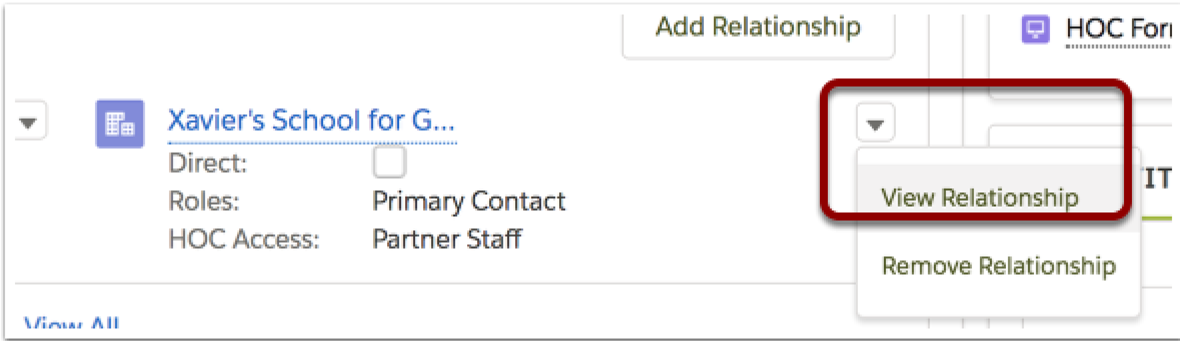
In the related list below, the contact only has HOC Access for "Xavier's School" -- not for the Deckel Household. (which is the direct account associated with the contact. (Household Accounts are automatically created for those using the Non Profit Success Pack)

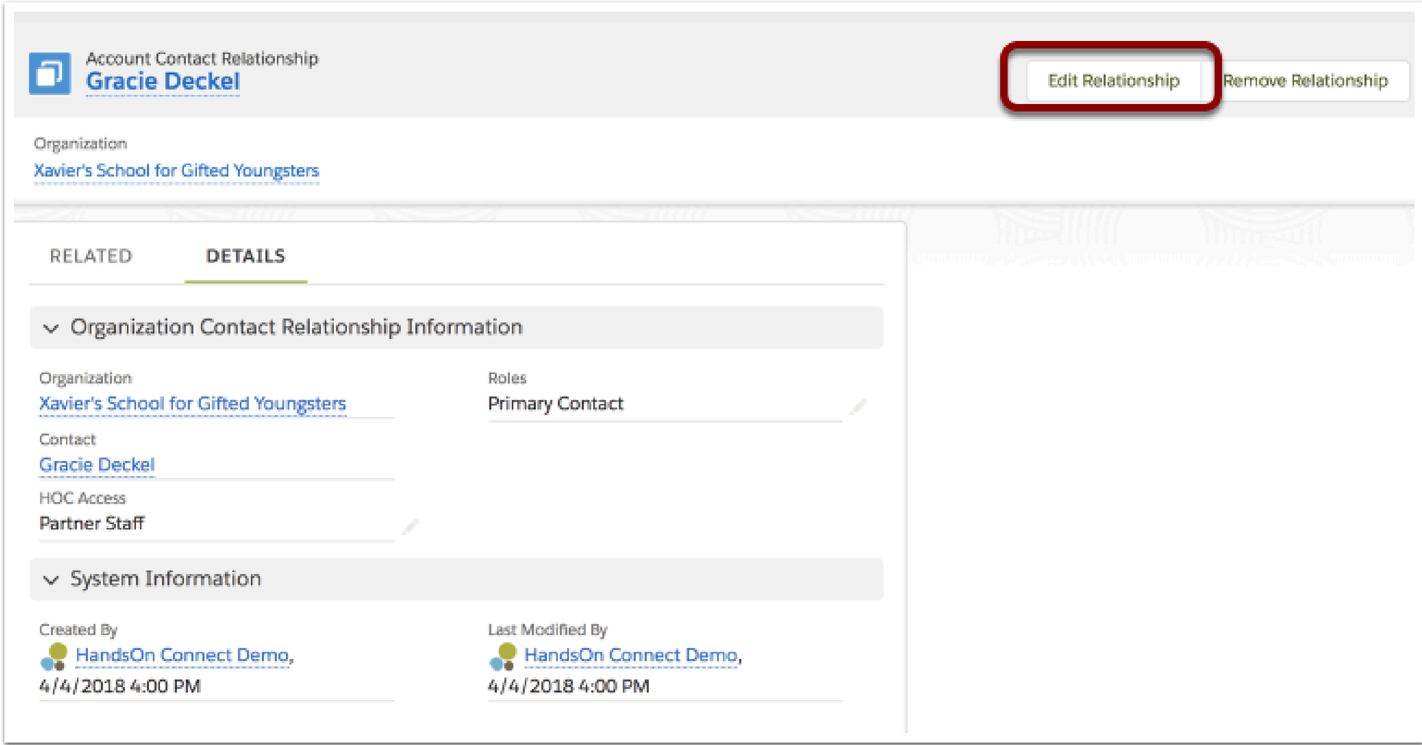


Editing Existing Relationships

You can edit any existing relationship by choosing "View Relationship" in the picklist associated with each relationship - and then, upon viewing the relationship, clicking on the "Edit Relationship Button"

You can also remove relationships you no longer wish to keep.




Account Contact Relationship
Gracie Deckel
Edit Relationship
Remove Relationship
Organization
Xavier's School for Gifted Youngsters
RELATED
DETAILS
Organization Contact Relationship Information
Organization
Xavier's School for Gifted Youngsters
Roles
Primary Contact
Contact
Gracie Deckel
HOC Access
Partner Staff
System Information
Created By
HandsOn Connect Demo,
4/4/2018 4:00 PM
Last Modified By
HandsOn Connect Demo,
4/4/2018 4:00 PM