

Creating / Editing a contact record

Creating a volunteer from the public site:

The screenshot shows the 'HandsOnConnect DEMO' public site. The top navigation bar includes 'For Volunteers' and 'For Organizations'. A secondary navigation bar contains links: 'FIND AN OPPORTUNITY', 'SPECIAL EVENTS', 'BROWSE ORGANIZATIONS', 'RESOURCES', and 'BECOME A MEMBER'. A red arrow points to 'BECOME A MEMBER'. Below this, a dropdown menu is open, showing 'About Membership' and 'Sign Up/Registration', with a red arrow pointing to 'Sign Up/Registration'. The main content area is titled 'Volunteer Sign Up' and includes a 'SUBMIT' button. Below the title is a 'BASIC INFO' section with required fields: First Name, Last Name, Community Nick Name, and Date of Birth. There is also a 'Profile Photo' upload area.

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

The screenshot shows the administrative interface of HandsOnConnect. The top navigation bar includes 'Home', 'Chatter', 'Organizations', 'Contacts', 'Locations', 'Volunteer Opportunities', 'Occurrences', 'Volunteer Events', 'Volunteer Teams', 'Connections', and 'Documents'. The 'Contacts' tab is selected. Below the navigation bar, there is a 'Site Managed by:' section with a user profile picture. The main content area is titled 'Contacts Home'. It includes a 'View:' dropdown menu set to 'Birthdays This Month' with a 'Go!' button and links for 'Edit' and 'Create New View'. Below this is a 'Recent Contacts' table with columns for 'Name' and 'Organization Name'. A red arrow points to a 'New' button located above the table.

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.

Contact Edit [Save] [Save & New] [Cancel]

Contact Information

Contact Owner: Larry Deckel

First Name: --None-- [Vickie]

Last Name: Volunteer

Middle Name:

Username: troutco+training_volu

1 Registration Status: Registered

2 Employer: Riverside Proper

3 Organization Name: Individual

Title: Director of Human Sei

Address Information [Copy Home Address to B]

Primary Address? [Home]

Home Street: 6321 Volunteer Street

Home City: Riverside

Home State/Province: CA

Home Zip/Postal Code: 92501

Home Country:

Business Street:

Business City:

Business State/Province:

Business Zip/Postal Code:

Business Country:

Phone, Fax, and Email

Primary Phone? [Mobile]

Business Phone:

Home Phone:

Mobile Phone: 951-123-1234

Other Phone:

Fax:

4 Email: troutco+training_volu

Alternate Email:

Demographic Information

Gender: Female

Ethnicity/Race: White/Caucasian

Marital Status: Single

Education Level: Graduate degree

Employment Status: Full Time

5 Birthdate: 12/23/1960

6 Calculated Birthdate: []

7 Person with Disability: [x]

Disaster Volunteer: [x]

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.

▼ Volunteer Information	
1 Orientation Completed <input checked="" type="checkbox"/>	6 Court Ordered Volunteer <input type="checkbox"/>
Orientation Completed Date 7/1/2010	Background Check Completed <input type="checkbox"/>
2 Minor Waiver on File <input type="checkbox"/>	Skill Profile Completed <input type="checkbox"/>
Date Minor Waiver Received	
Heard About Us?	
Contact Type	
Volunteer Type	
Volunteer Activity Type	
Interests	
Target Population	
Goods and Services	
Communication Preferences	
4 3 5 Hours Served 1.0	
▼ Invitation Information	
7 Accepts Invitations <input type="checkbox"/>	Max Distance for Invitations
Availability	
▼ Description Information	
Description	
▼ System Information	
Created By <u>Larry Deckel</u> , 7/12/2010 6:48 PM	Last Modified By <u>Art Ordoqui</u> , 10/13/2010 4:19 PM
[Save] [Cancel]	

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).

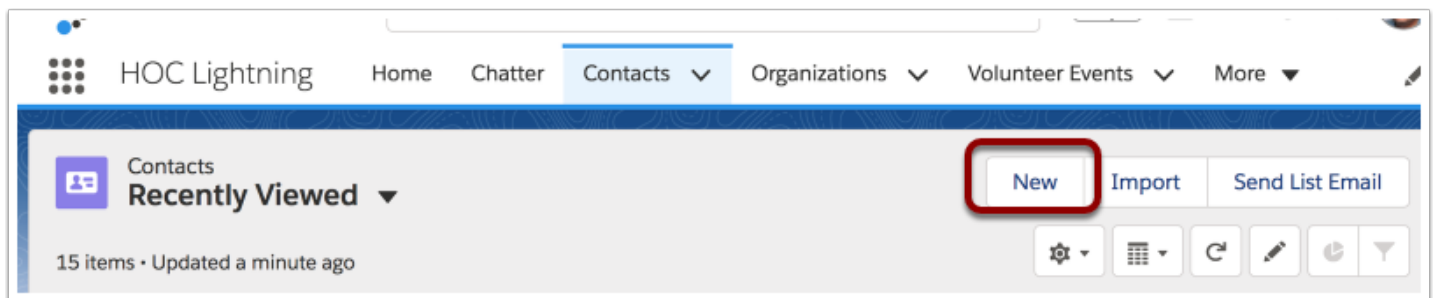
11. **Hours Served** - this is an auto-calculated field. **Do not** manually update this field or it will break the calculation that would normally be made here.

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.

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... Q

Employer

Parental Consent

--None--

Parent Email

Address Information

Primary Address?

Home

Home Address

Q Search Address

Home Street

Business Address

Q Search Address

Business Street

Cancel

Save & New

Save