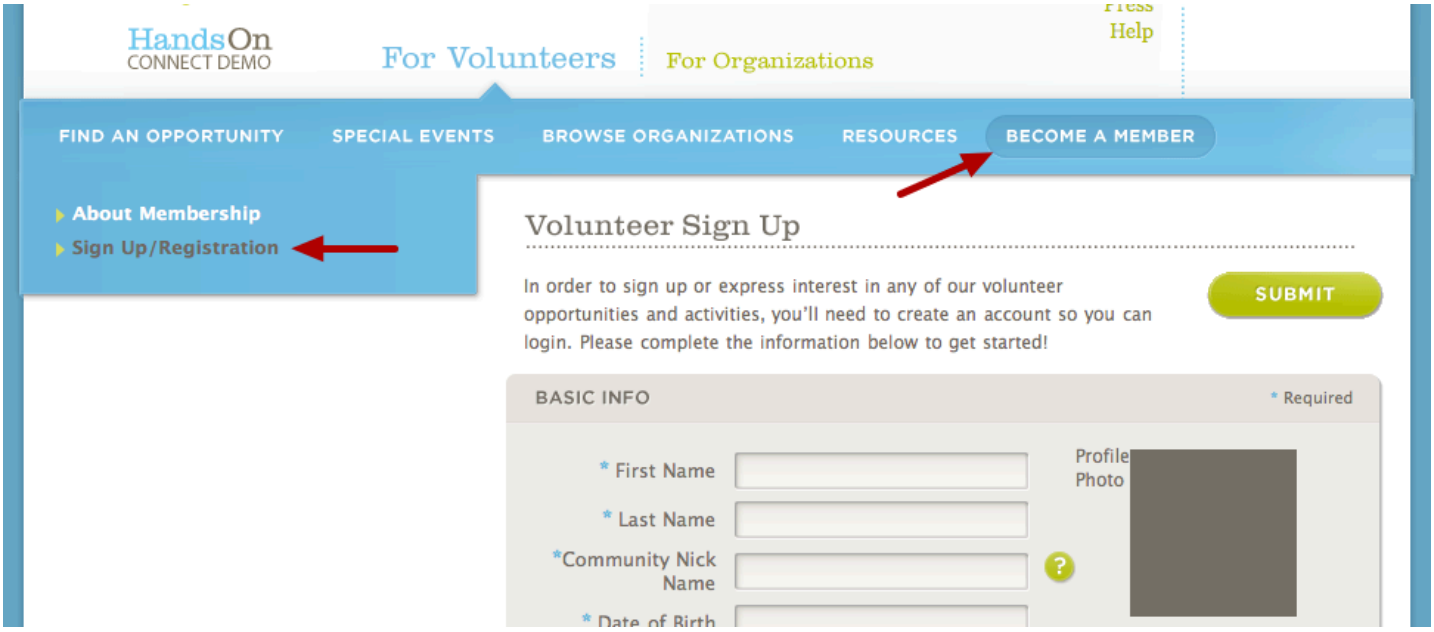
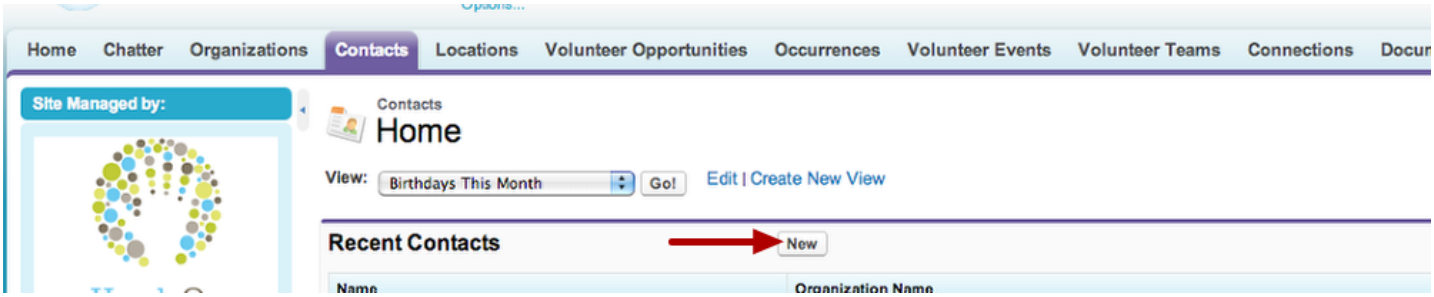
Creating / Editing a contact record

Creating a volunteer from the public site:



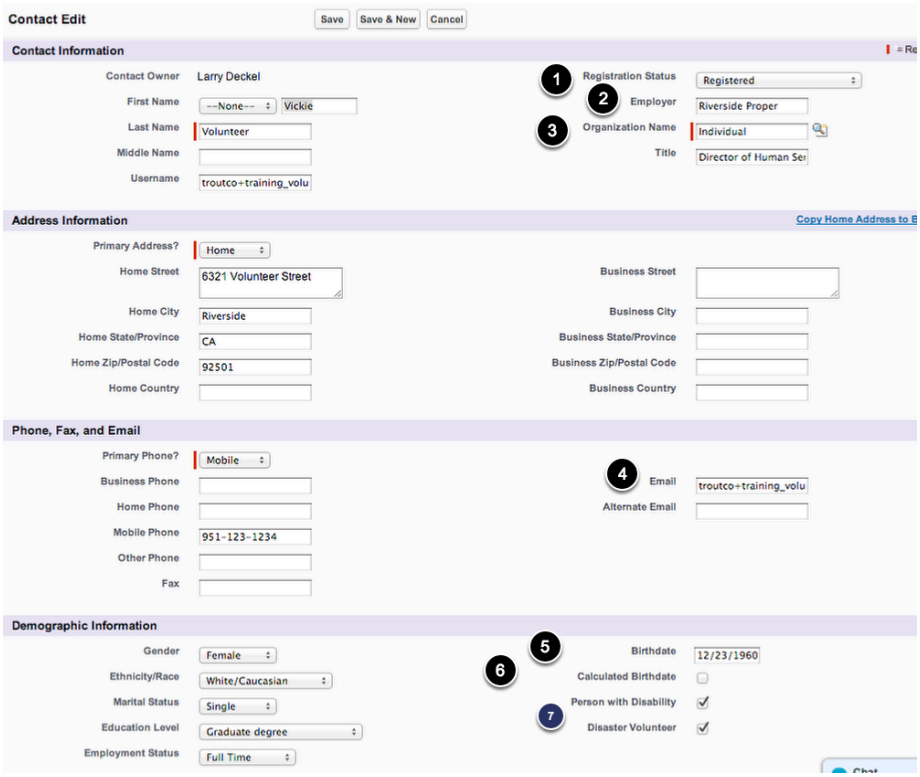
But there are lots of different kinds of contacts you might want to add to your database, and you can always add a contact to the system administratively.

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

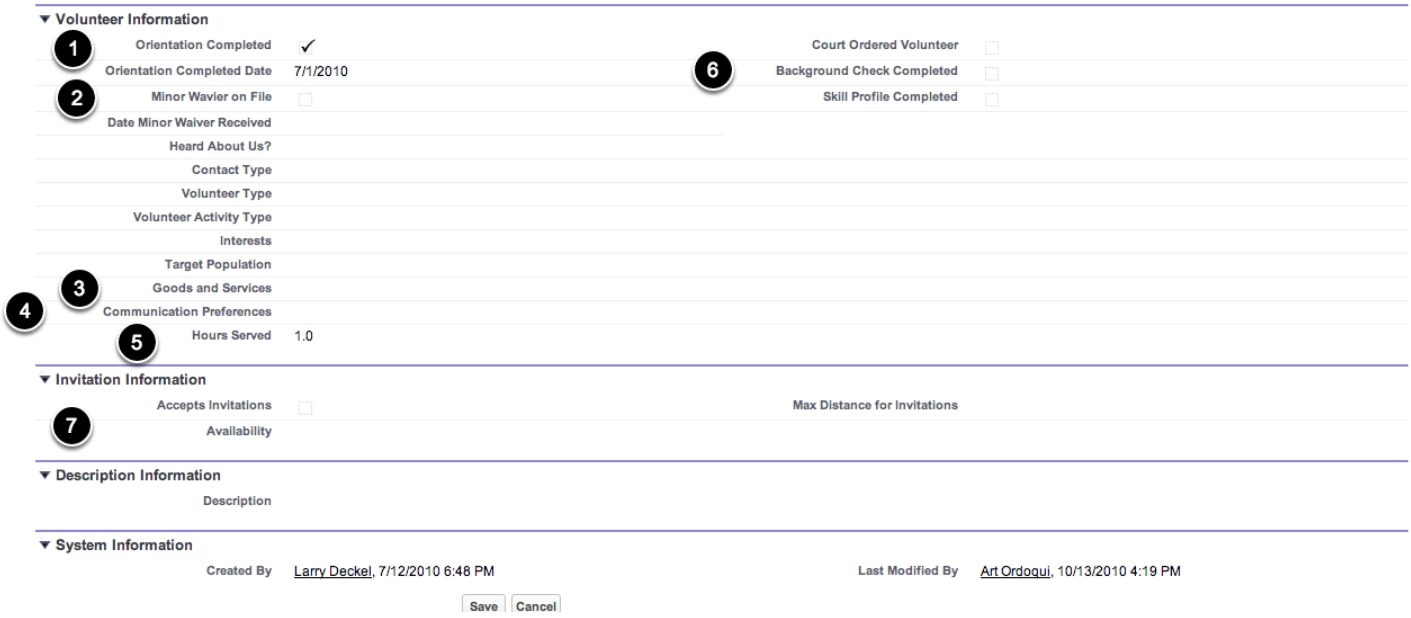
5. **Birthdate** - This field is not required for all contacts **however**:

• 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).

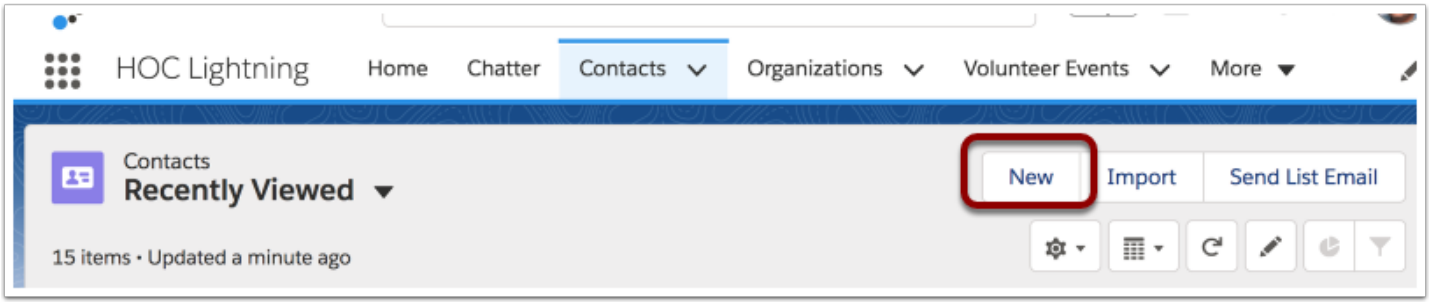
11. **Hours Served** - this is an auto-calculated field. **Do not** manually update this field or it will break the calculation that would normally be made here.

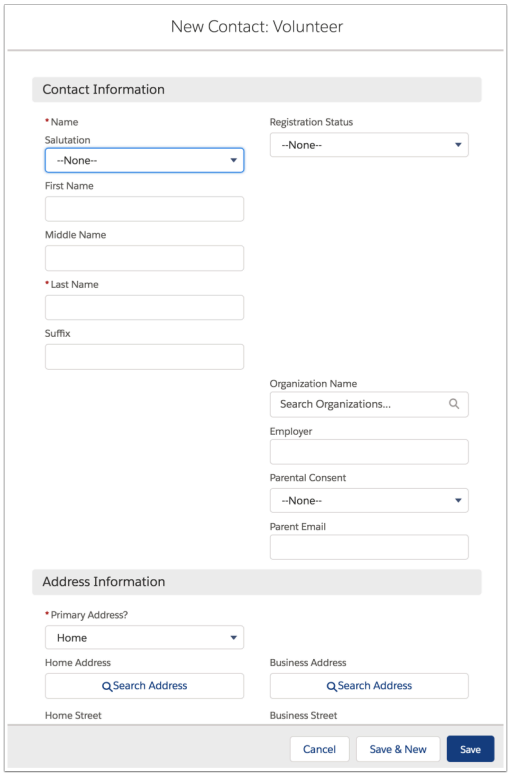
12. **Court Ordered / Background Check / Skills Profile Completed** - these are fields that indicate whether to apply certain restrictions or permissions allowing this contact to volunteer for restricted opportunities.

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
Home Street
Business Address
Search Address
Business Street
Cancel
Save & New
Save