Instructions "How Do I..."

Creating a Project in the Database

You can get more detailed instructions on each in Quick Guides on Salesforce. The Quick Guides are on the Documents tab in Salesforce. Select Quick Guides from the drop down list. There is one called Volunteer Projects, which is a word document and it has a YouTube video at the top of the document that describes how to create and use opportunities and projects in Salesforce. There is also one called Creating and Managing Service, Opportunities and Projects that might be helpful.

Make sure to complete the creation in the following order, it will result in some of the data pre-populate in each subsequent step. This document is also in the Quick Guides section in Salesforce ""Data Entry - Suggested Field List for SAMPLE COMPANY". Please fill in as many fields as possible, but these are critical to SAMPLE COMPANY.

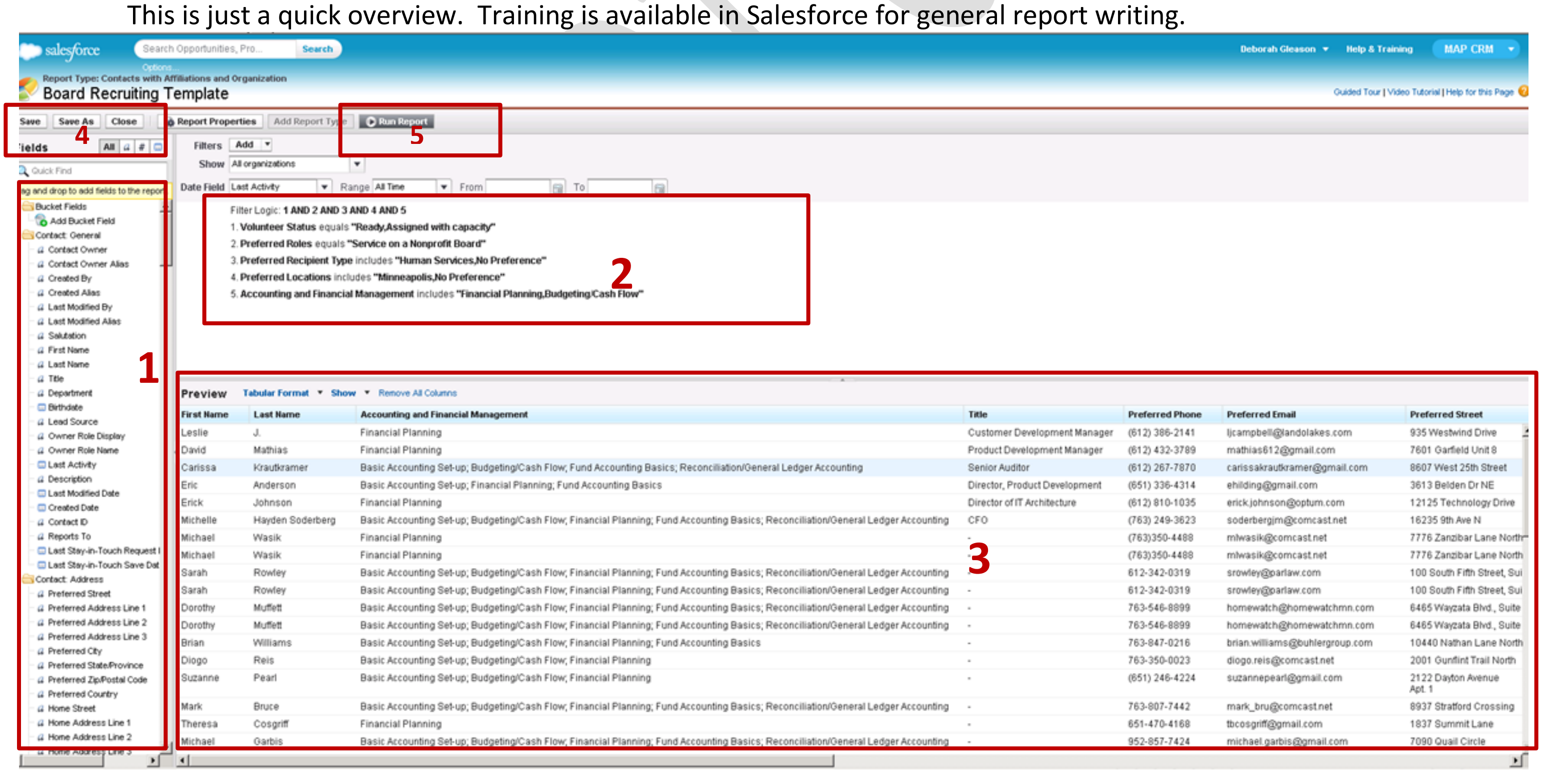
- **Organization**
    - Organization name (no acronym or abbrev in this field)
    - Acronym (use this field, if have abbrev or acronym)
    - Type
    - Main phone
    - (any other contact information you have)
    - Org Budget Size
    - Org Cause Area
    - Org Service Area
    - *After SAVE*
    - Main Organization Address
- **Contact**
    - (if only have minimal info enter as lead)
    - First Name
    - Last Name
    - Organization Name
    - Title
    - Position Level
    - Email (any type and chose as preferred)
    - Phone (any type and chose as preferred)
    - Lead Source
    - *After SAVE (confirm/enter the following)*
    - Organization Affiliation
    - Address Information (add Main Org address etc.)
- **Opportunity**
    - Opportunity Name (will self-populate)
    - Organization Name (will self-populate, if you enter the opportunity from the org record)
    - Lead Source

- Sales Lead
- Project Lead (not req. for initial entry)
- Project Department
- Job Code
- Close Date (for current stage)
- Stage
- Client Evaluation Contact

- **Project**
  - Project Name (enter what will appear in evaluation)
  - Opportunity
  - Project Start Date
  - Status
  - *Hours & Expenses Section*
  - Type
  - Other fields based on type
  - Add additional Time Resources, as needed
  - Confirm that you have entered the Project Lead and Evaluation Contact from the Opportunity

Running a Candidate Search Report

This is just a quick overview. Training is available in Salesforce for general report writing.



<u>Section 1</u> – This is the list of available metrics. You can drag and drop from here to where you want in section 2 or 3. You can scroll through to find what you want or type the first few letters to narrow the search. Finding the right variable may be a little challenging.

Section 2 – This is the criteria for the report.

Filter Logic is the how you want the rules to relate. The one above of 1 AND 2 AND 3 AND 4 AND 5 means that ALL of the conditions must be met. If you want either one rule or another to be met, use and OR. When you add rules, you need to change this as well. Salesforce will give you an error if you do not have the logic to cover all rules.

Rules are a metric and how they relate to a value. If you have only one value, use “equals” this is an EXACT match only. If you have multiple possibilities (Minneapolis or St Paul), use “includes”. You can also use “not equal to” and leave the field blank if you want anything with a value. This is good for the Skill groups, so you can get all records with any value in the Skill group you care about for the search.

Try to make these simple and direct. Also, you can only have 9 statements currently.

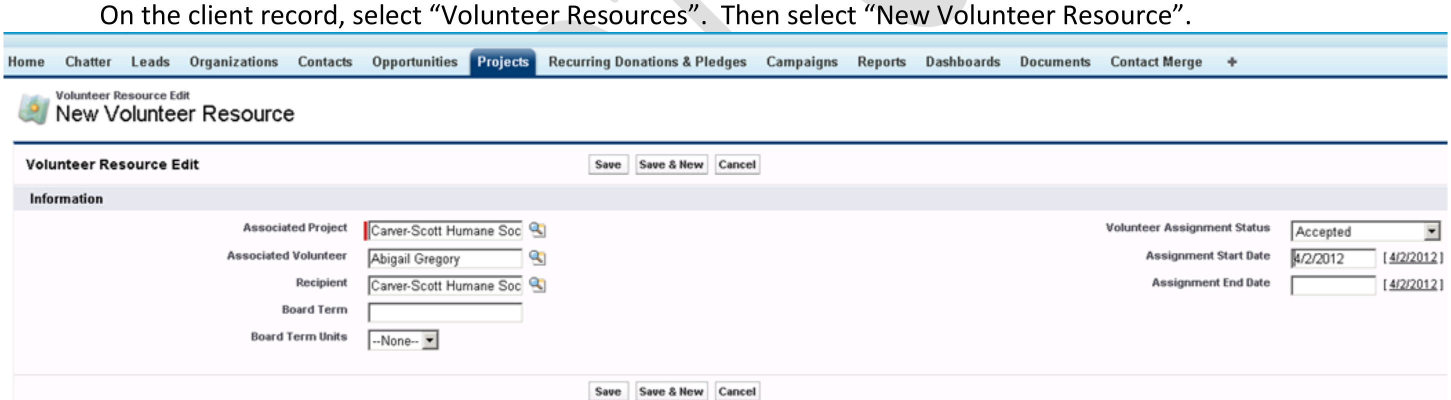
Section 3 – This is the preview of the report. Drag and drop new columns from section 1. If you want to remove a column, just drag and drop it off to the left. This is NOT the complete report. That will not be visible until you Run the report.

Section 4 – This is where you can save the report. MAKE SURE TO NOT SAVE OVER OUR TEMPLATE REPORTS. Use the save as for the first time you are editing the report.

Section 5 – Click this to run your report.

Creating a Volunteer Resource Record

On the client record, select “Volunteer Resources”. Then select “New Volunteer Resource”.



Associated Project – Key part or the entire name of the Project and hit the search (little magnifier), then click on the proper Project.

Recipient - Key part or the entire name of the opportunity and hit the search (little magnifier), then click on the proper Opportunity.

Board Term and Board Units – IF you know this, enter them. Often this is not known or terms are renewable.

Volunteer Assignment Status – This can progress through “undecided” to either “accepted”, “declined” or “rejected” (“undecided pre 2011 is for data transferred from Legend).

Assignment Start Date – the date the candidate started serving on the board.

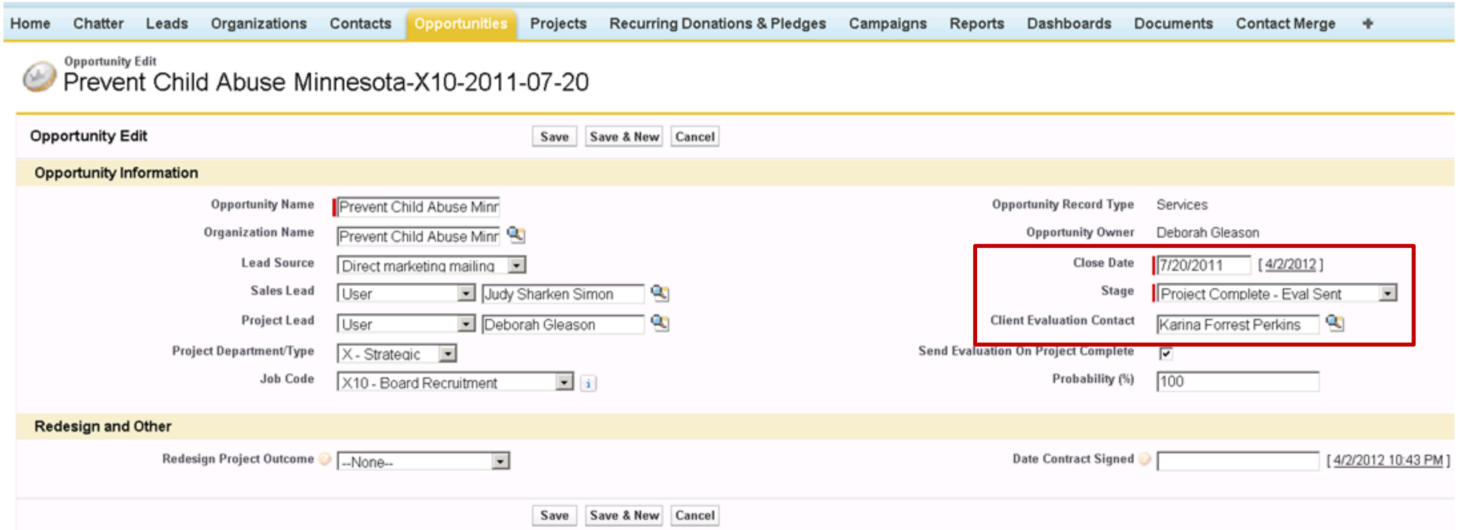
Assignment End Date – will populate if you fill in the term and units. Often not known.

Return to the contact record to update the Volunteer Status.

Closing a Project (Screens)

There are two screens that need updating when a project closes.

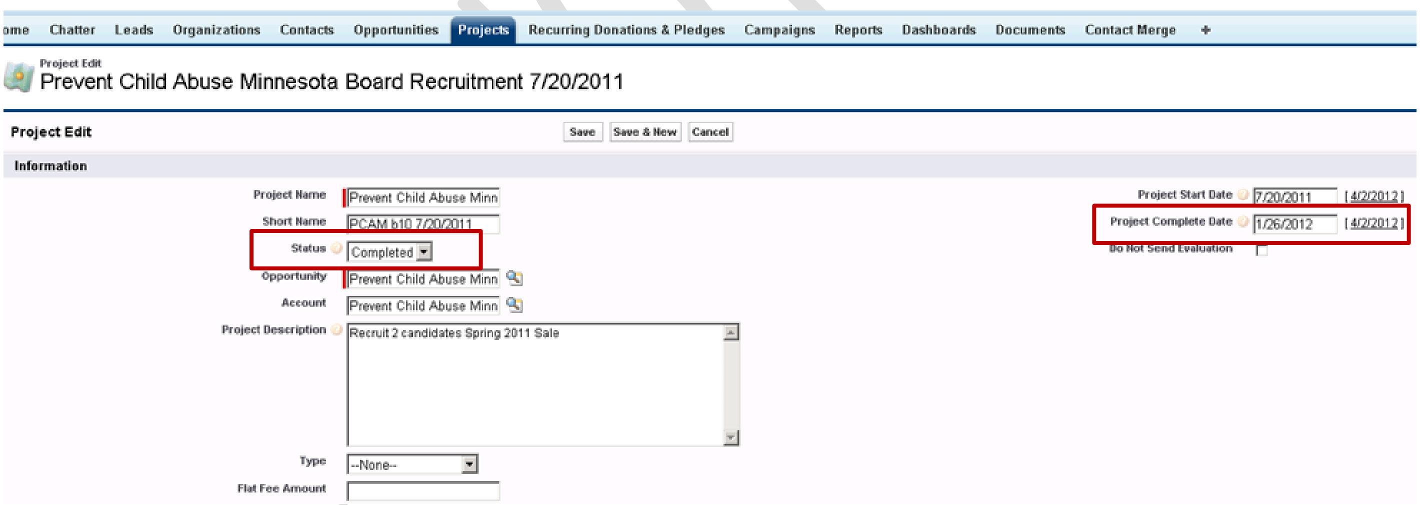
<u>The first is the client Opportunity.</u>



Red Boxed Section

- Enter the close date (DO NOT back date, it impedes the evaluation process).
- Update the Stage to “Project Complete” (this example has already gone through the evaluation step).
- Make sure there is a Client Evaluation contact and that it is current.

<u>The second is the client Project.</u>



Red Boxed Sections

- Change the Status to “Completed”
- Enter the “Project Complete Date” (preferably today or the same as what was entered on the Opportunity.