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# Instructions “How Do I...”

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## Creating a Project in the Database

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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.

The screenshot shows the Salesforce report builder interface for a report titled "Board Recruiting Template". The interface includes a left-hand sidebar with a list of available fields (labeled 1), a central area for filter logic (labeled 2), and a bottom preview table (labeled 3). The "Run Report" button is highlighted with a red box (labeled 5), and the "Save" button is also highlighted (labeled 4).

**Filter Logic:**

1. Volunteer Status equals "Ready,Assigned with capacity"
2. Preferred Roles equals "Service on a Nonprofit Board"
3. Preferred Recipient Type includes "Human Services,No Preference"
4. Preferred Locations includes "Minneapolis,No Preference"
5. Accounting and Financial Management includes "Financial Planning,Budgeting,Cash Flow"

**Preview Table:**

First Name	Last Name	Accounting and Financial Management	Title	Preferred Phone	Preferred Email	Preferred Street
Leslie	J.	Financial Planning	Customer Development Manager	(612) 285-2141	ljcampbell@andotakes.com	925 Westwind Drive
David	Mathias	Financial Planning	Product Development Manager	(612) 432-3789	mathias612@gmail.com	7601 Garfield Unit 8
Carissa	Kraufbramer	Basic Accounting Set-up, Budgeting/Cash Flow, Fund Accounting Basics, Reconciliation/General Ledger Accounting	Senior Auditor	(612) 267-7870	carissakraufbramer@gmail.com	8607 West 25th Street
Eric	Anderson	Basic Accounting Set-up, Financial Planning, Fund Accounting Basics	Director, Product Development	(651) 336-4314	ehilding@gmail.com	3613 Belden Dr NE
Erick	Johnson	Financial Planning	Director of IT Architecture	(612) 810-1035	erick.johnson@optum.com	12125 Technology Drive
Michelle	Hayden Soderberg	Basic Accounting Set-up, Budgeting/Cash Flow, Financial Planning, Fund Accounting Basics, Reconciliation/General Ledger Accounting	CFO	(763) 249-3623	soderbergjm@comcast.net	16235 9th Ave N
Michael	Wasik	Financial Planning	-	(763)350-4488	mwasik@comcast.net	7776 Zanzibar Lane North
Michael	Wasik	Financial Planning	-	(763)350-4488	mwasik@comcast.net	7776 Zanzibar Lane North
Sarah	Rowley	Basic Accounting Set-up, Budgeting/Cash Flow, Financial Planning, Fund Accounting Basics, Reconciliation/General Ledger Accounting	-	612-342-0319	srowley@parlaw.com	100 South Fifth Street, Sul
Sarah	Rowley	Basic Accounting Set-up, Budgeting/Cash Flow, Financial Planning, Fund Accounting Basics, Reconciliation/General Ledger Accounting	-	612-342-0319	srowley@parlaw.com	100 South Fifth Street, Sul
Dorothy	Mufflet	Basic Accounting Set-up, Budgeting/Cash Flow, Financial Planning, Fund Accounting Basics, Reconciliation/General Ledger Accounting	-	763-546-8899	homewatch@homewatchmn.com	6485 Wayzata Blvd., Suite
Dorothy	Mufflet	Basic Accounting Set-up, Budgeting/Cash Flow, Financial Planning, Fund Accounting Basics, Reconciliation/General Ledger Accounting	-	763-546-8899	homewatch@homewatchmn.com	6485 Wayzata Blvd., Suite
Brian	Williams	Basic Accounting Set-up, Budgeting/Cash Flow, Financial Planning, Fund Accounting Basics	-	763-847-0216	brian.williams@ouhliergroup.com	10440 Nathan Lane North
Diogo	Reis	Basic Accounting Set-up, Budgeting/Cash Flow, Financial Planning	-	763-350-0023	diogo.reis@comcast.net	2001 Gunflint Trail North
Suzanne	Pearl	Basic Accounting Set-up, Budgeting/Cash Flow, Financial Planning	-	(651) 246-4224	suzannepearl@gmail.com	2122 Dayton Avenue Apt. 1
Mark	Bruce	Basic Accounting Set-up, Budgeting/Cash Flow, Financial Planning, Fund Accounting Basics, Reconciliation/General Ledger Accounting	-	763-807-7442	mark_bru@comcast.net	8937 Stratford Crossing
Theresa	Cosgriff	Financial Planning	-	651-470-4168	tbcosgriff@gmail.com	1837 Summit Lane
Michael	Garbis	Basic Accounting Set-up, Budgeting/Cash Flow, Financial Planning, Fund Accounting Basics, Reconciliation/General Ledger Accounting	-	952-857-7424	michaelgarbis@gmail.com	7080 Quail Circle

**Section 1** – 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”.

The screenshot shows the 'New Volunteer Resource' form in Salesforce. The form is titled 'Volunteer Resource Edit' and has three buttons: 'Save', 'Save & New', and 'Cancel'. Below the title is an 'Information' section with the following fields:

- Associated Project: Carver-Scott Humane Soc (with a search icon)
- Associated Volunteer: Abigail Gregory (with a search icon)
- Recipient: Carver-Scott Humane Soc (with a search icon)
- Board Term: (empty text field)
- Board Term Units: --None-- (dropdown menu)
- Volunteer Assignment Status: Accepted (dropdown menu)
- Assignment Start Date: 4/2/2012 (with a calendar icon)
- Assignment End Date: 4/2/2012 (with a calendar icon)

At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

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.

### The first is the client Opportunity.

Opportunity Edit

Prevent Child Abuse Minnesota-X10-2011-07-20

Opportunity Information

Opportunity Name: Prevent Child Abuse Minn  
Organization Name: Prevent Child Abuse Minn  
Lead Source: Direct marketing mailing  
Sales Lead: User Judy Sharken Simon  
Project Lead: User Deborah Gleason  
Project Department/Type: X - Strategic  
Job Code: X10 - Board Recruitment

Opportunity Record Type: Services  
Opportunity Owner: Deborah Gleason  
Close Date: 7/20/2011 [4/2/2012]  
Stage: Project Complete - Eval Sent  
Client Evaluation Contact: Kanna Forrest Perkins  
Send Evaluation On Project Complete:   
Probability (%): 100

Redesign and Other

Redesign Project Outcome: --None--  
Date Contract Signed: [4/2/2012 10:43 PM]

#### 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.

### The second is the client Project.

Project Edit

Prevent Child Abuse Minnesota Board Recruitment 7/20/2011

Project Edit

Information

Project Name: Prevent Child Abuse Minn  
Short Name: PCAM b10 7/20/2011  
Status: Completed  
Opportunity: Prevent Child Abuse Minn  
Account: Prevent Child Abuse Minn  
Project Description: Recruit 2 candidates Spring 2011 Sale  
Type: --None--  
Flat Fee Amount:

Project Start Date: 7/20/2011 [4/2/2012]  
Project Complete Date: 1/26/2012 [4/2/2012]  
Do Not Send Evaluation:

#### 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).