Volunteers for Salesforce User's Guide

Version 3.5

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1. WHAT IS VOLUNTEERS FOR SALESFORCE?

Volunteers for Salesforce is a Salesforce package that can be installed into any enterprise Salesforce instance and is used to manage your organization's volunteer program.

1.1 Overview

Volunteers are managed in Salesforce using Contacts, Leads, Campaigns, and several custom objects, summarized below:

- **Volunteer Job** – used to specify a job that needs to be filled, as well as the skills needed for the job. It is always associated with a specific Campaign, and it includes summary information (rollups) of the number of volunteers and hours that have been applied to this job.

- **Volunteer Shift** – used to specify dates, times, and number of volunteers needed for a specific Volunteer Job. Use of Shifts is optional.

- **Volunteer Hours** – used to track the hours a volunteer spends for your organization, including the date(s) worked, the hours spent, and the volunteer job it was for. Can also specify the specific shift the volunteer filled. Also used to tentatively schedule volunteers for specific shifts and positions.

- **Job Recurrence Schedule** – used to specify a recurring set of shifts for a specific job that the application will automatically create and maintain into the future.

- **Volunteer Recurrence Schedule** – used to specify a recurring set of dates and times that a specific volunteer will fulfill a specific job.

Volunteer information about contacts is stored in several custom fields on an individual's contact record, which includes availability, skills, status, and a summary of the hours worked. Similarly, Leads also have these same volunteer related fields.

Campaigns have several custom fields added to them to show summary information of the number of hours and number of volunteers who have worked on all Volunteer Jobs in the Campaign.

In the Appendix to this guide, you can find more details about the Salesforce objects used in this package, including a diagram.

1.2 How You Might Use It

Volunteers for Salesforce is designed to handle many common activities related to nonprofit volunteer management:

- Tracking the volunteer jobs that an organization needs filled.

- Tracking all the hours a volunteer works.

- Tracking hours against specific volunteer shifts, if desired.

- Tracking all the volunteer hours and jobs for a specific event, or as ongoing needs that are not directly tied to a single event.

- Signing up to be a volunteer on a website.

- Listing available jobs, and optionally shifts, on a website, and allowing signup.

- Allowing volunteers to report the hours they worked from a website.

- Helping to match volunteers to available jobs by skills and availability.

- Automatically sending email reminders for upcoming shifts a volunteer is signed up for.

2. FEATURES

2.1 Volunteers for Salesforce Application

When you install Volunteers for Salesforce, you'll have a new application available to you called "**Volunteers**" that you can select from the drop-down menu at the top right of all Salesforce pages. When you select this application, you will see the following tabs:
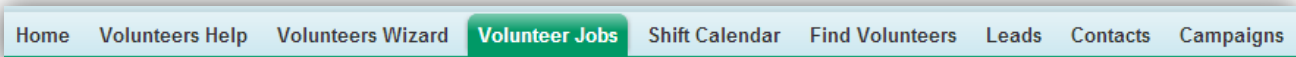
- Home
- Volunteers Help
- Volunteers Wizard
- Volunteer Jobs
- Shift Calendar
- Find Volunteers

- Leads
- Contacts
- Campaigns
- Reports
- Dashboards
- + (for access to additional tabs)

Before we explore the features found in each section, it's important to understand how Volunteers for Salesforce works with your current Salesforce instance. Whether you are using the app to manage volunteers for a single event or are tracking your office volunteers' hours over the year, you are going to work with Volunteer Contact Records (each individual), Volunteer Campaigns (the event or ongoing volunteer initiative) and Volunteer Jobs (the volunteer jobs associated with the event or initiative).

2.2 Volunteers Help

The Volunteers Help tab displays the Volunteers for Salesforce website that provides links to useful resources, such as the User's Guide and Installation & Configuration Guide, FAQ's, and videos. ***Please review the website and all of its resources when you have questions about using or configuring Volunteers for Salesforce.***

2.3 Contacts

Volunteer Contacts are normal Salesforce Contacts with additional fields for designating volunteer status and tracking volunteer information. Each person volunteering for your organization will have a Contact record with Volunteer-specific information.

Additional fields include:

- Volunteer Status – single select list with the following options:

    o Active – Considered an active volunteer. Is automatically set to Active for contacts that complete a volunteer job or shift.

    o Inactive – Considered an inactive volunteer.

    o New Sign Up – Default status for a contact that signs up to volunteer via a web form.

    o Prospective – Someone your organization is considering for a volunteer job.
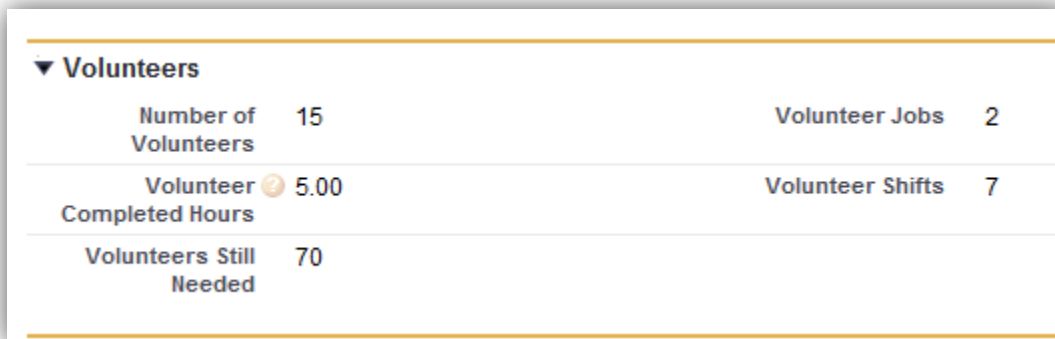
- Volunteer Skills – a multi-select list with skills that are pertinent to your organization. For information on changing this list of skills, see the *Volunteers for Salesforce Installation & Configuration Guide.*

- Volunteer Availability – a multi-select list with availability options that are pertinent to your organization. For information on changing this list of values, see the *Volunteers for Salesforce Installation & Configuration Guide.*

- Volunteer Hours – a read-only field that shows you the sum of all volunteer hours the contact has completed.

- Volunteer Notes – a long text field to track additional information the volunteer has provided. Typically set from a web signup form.

- Volunteer Organization – a text field to track the name of the organization the volunteer is working on behalf of. Typically set from a web signup form.

- Volunteer Manager Notes – a long text field to allow staff to record any useful information about the volunteer.

- First Volunteer Date – a calculated field that holds the date of the volunteer's first completed work.

- Last Volunteer Date – a calculated field that holds the most recent date of the volunteer's completed work.

- Volunteer Last Web Signup Date – a date field that is set by the Volunteer web forms, and is used to fire workflow to send email thank you's to the Volunteer, and notifications to the Volunteer Manager in your organization.

- Volunteer Manager Notes – a long text field for your volunteer manager to make any notes about the volunteer.

- Volunteer Auto-Reminder Email Opt Out – a checkbox that specifies whether the volunteer wants to receive volunteer shift reminder emails.

Volunteer information on a Contact record.

2.4 Campaigns

For an event or volunteer initiative where you need volunteers, you will set up a Volunteer Campaign. Volunteer Campaigns are used to manage a set of Volunteer Jobs. This allows the system to provide useful summary information, including the number of Jobs, the number of Shifts, the number of Volunteers, the number of Volunteers still needed, and the total of completed Volunteer Hours.

Volunteer information on a Campaign record.

The easiest way to create a new Volunteer Campaign is by using the Volunteers Wizard tab, which is described next.

2.5 Volunteers Wizard

With the Volunteers Wizard you can easily:

- Create a new Volunteer Campaign

- Create sample Volunteer Jobs and Shifts for you to use as a starting point

- Copy all of the Volunteer Jobs, Shifts and Volunteers from an existing Volunteer Campaign to create a new Volunteer Campaign

You can specify which fields on a Campaign are displayed on the Volunteers Wizard. This way any Campaign fields that your organization always wants filled out when a new Campaign is created, can be included on this page. See the *Volunteers for Salesforce Installation & Configuration Guide* for details on how to do this.

USING THE VOLUNTEERS WIZARD TO CLONE A CAMPAIGN

The Volunteers Wizard can also be used to copy an existing Volunteers Campaign, copying over all of the Jobs, Shifts, and optionally Volunteers assigned to that campaign. This functionality can be very useful to set up jobs and volunteers for a similar event. When you select an existing campaign to clone, the bottom section of the Volunteers

Wizard will hide the Sample Job and Sample Shift fields, and display some additional fields.

- First Shift Date – shows the date of the first shift in the existing campaign.

- New First Shift Date – allows you to specify on what day the new first shift should start. All subsequent shifts will be created with the same number of days offset.

- Copy Job and Shift Volunteers – Specifies whether you want Volunteer Hours from the existing campaign to be copied over to the new campaign.

- Override Volunteer Hours Status – if you check "Copy Job and Shift Volunteers", this field specifies whether the new Volunteer Hours should copy over the existing Status value (prospect, confirmed, completed, no-show), or use the specified Status value.

2.6 Volunteer Jobs

Volunteer Jobs are the volunteer opportunities associated with a Volunteer Campaign. Select the Volunteer Jobs tab when you want to view existing Jobs, or to create new Jobs. From the View drop-down menu, you are able to see "All Jobs," "Ongoing Jobs," and "Available Jobs."

CREATE A NEW JOB

Click on the "**New Volunteer Job**" button to create a new Job. This brings up the Job detail page, where you enter information about the job. This includes:

- Volunteer Job Name – The name of the job.

- Campaign – The Volunteers Campaign that this job belongs to. Counts of hours and volunteers are rolled up as summary information available on the campaign. If this job is not for a specific event, you still need it associated with a Volunteers campaign. We suggest you create one Volunteers campaign to use for all of your ongoing jobs that aren't tied to a specific event.

- Ongoing – Check this box if this Job is for an ongoing need, such as office help, rather than for a specific event. Note that this checkbox is useful for reporting and filtering, but you must still set up Job Recurrence Schedules, to actually implement recurring shifts. See the section on Job Recurrence Schedules for more information.

- Inactive- Check this box when you no longer want this job to be an option in various job dropdowns on various pages. You should always make a job Inactive, rather than deleting it, to preserve the historical information of the hours any volunteers have served doing this job.

- Display on Website – Check this box to include this job on the various Volunteer Sites pages you can host on your website.

- Volunteer Website Time Zone – Choose a time zone from this select list if you need to override the default time zone of the job's Campaign, or Volunteers Sites time zone. You can typically leave this blank.

- Skills Needed – This is a multi-select list that allows you to specify the skills you desire volunteers to have for this job. For information on changing this list of skills, see the *Volunteers for Salesforce Installation & Configuration Guide*.

- Description – A full description of the job. This rich text description can be displayed on your website, if you use the Job Posting functionality (described below in "Website Integration").

- Location fields – Optional address fields you can fill out to track the location of the job. These can be included on your website when displaying jobs.

Volunteer Job Detail

[Edit] [Delete] [Clone]

Volunteer Job Name	Food Serving	Number of Shifts	3
Ongoing	☐	Number of Volunteers	13
Inactive	☐	# of Volunteers Still Needed	49
Display on Website	✓	Number of Completed Hours	3.00
Campaign	Big Dinner Event 2010		
Skills Needed	Manual Labor		
Description	Help serve the meal, refill water & coffee, and pickup dirty plates. *Fun!*		

▼ **Location**

> If the standard location fields that are provided are not appropriate for your needs, you can add a custom picklist to the Volunteer Job object. If you are already tracking locations in your database as a separate object, then you could create a lookup field from Jobs to your location object.

2.7 Volunteer Shifts

After you create a Volunteer Job, you are able to then create specific Shifts to track how many volunteers you need at a specific time.

> Shifts are optional, and don't need to be used if you aren't tracking your volunteers with specific time slots.

CREATING A SHIFT

Go to the detail page of the Volunteer Job that you want to create the Shift for. From the Volunteer Shifts related list on the page, click the "**New Volunteer Shift**" button. This brings up the Volunteer Shift Edit page, where you enter information about the shift. This includes:

*   Volunteer Job – The job this shift is for.

*   Start Date & Time – When the shift starts.

*   Duration (Hours) – How long the shift lasts.

- Description – Any notes specific to this shift.

- Desired # of Volunteers – How many volunteers are desired for this shift.

Volunteer Shift Detail   Edit Delete Clone

ShiftID	Shift-0016
Volunteer Job	Food Serving
Start Date & Time	10/1/2010 7:00 PM
Duration (Hours)	2.00
Description	serving the meal, etc.
Desired # of Volunteers	20
Total Volunteers	1
# of Volunteers Still Needed	19

The following fields are read only, and maintained by the system:

- Total Volunteers – the number of volunteers who are assigned to this shift with a Volunteer Hours Status of "Committed" or "Completed".

- # of Volunteers Still Needed – an automatically calculated value of how many volunteers the shift still needs.

- Job Recurrence Schedule – Automatically set by the system scheduler to show the Job Recurrence Schedule that this shift is associated with.

- System Note – a text field set with information from the system scheduler.

2.8 Volunteer Hours

Volunteer Hours are records used to track the hours that your contacts have spent volunteering for your organization. They are always associated with both a Contact and a Volunteer Job, and they can optionally also specify a Volunteer Shift for the Volunteer Job. Since organizations may have different practices for tracking this type of information, Volunteer Hours includes a Start Date and End Date, to allow tracking of Hours over an extended period of time. Additionally, an organization can use Volunteer Hours to track the Contacts they hope to have do a job (and shift), or have committed to do a job (and shift). Volunteer Hours also supports the tracking of a group of volunteers, where you only know the lead person for the group. The fields tracked for Volunteer Hours include:

- Contact – The person who is volunteering.

- Volunteer Job – The Job the person volunteered for.

- Volunteer Shift – An optional Shift for the Volunteer Job.

- Status – A single-select list with the following values for tracking the volunteer's hours through the various phases to a completed engagement:

    o Prospect – The volunteer is being considered for this volunteer job.

    o Confirmed – The volunteer is confirmed and expected to volunteer for this job.

    o Completed – The volunteer participated in the volunteer job.

    o No-Show – The volunteer was expected to show up but didn't.

    o Web Sign Up – This status is set when a Volunteer signs up through one of the web pages.

    o Canceled – The volunteer can no longer do this job or shift. This status prevents the system scheduler from re-assigning a recurring volunteer to this shift.

> Note that these picklist values should not be changed or added to, since they have special meaning to the system and affect scheduling and rollups.

- Number of Volunteers – For a specific individual, this will typically be 1. In cases where the Contact is the point person for a group who is bringing multiple volunteers, this number can be set to represent the total number of people in the group.

- Hours Worked – The number of hours actually worked. For groups, this should still be the number of hours a single person worked. When calculating total hours, the system will automatically take the Number of Volunteers multiplied by the Hours Worked.

- Comments – Any additional information that you find useful to record.

- Start Date – The beginning date these hours are for.

- End Date – The ending date these hours are for. For specific hours against a Shift, this will typically be the same as Start Date. But for tracking the hours over a longer period of time (month, quarter, year), the End Date will be used.

- Planned Start Date & Time – The actual date & time the volunteer is planning on starting. This is usually the starting time of the Shift, but having this field allows you to track volunteers who might not start at the normal time.

- Volunteer Recurrence Schedule – Automatically set by the system scheduler to show the Volunteer Recurrence Schedule that this Hours record is associated with.

- System Note – A text field set with information from the system scheduler.

Volunteer Hours Detail [Edit] [Delete] [Clone]

HoursID	00021	Volunteer Campaign	Big Dinner Event 2010
Contact	Tim Barr	Start Date	10/1/2010
Volunteer Job	Food Serving	End Date	10/1/2010
Volunteer Shift	Shift-0016		
Status	Completed		
Number of Volunteers	1		
Hours Worked	3.00		
Total Hours Worked	3.00		
Comments			

RECORDING VOLUNTEER HOURS

There are multiple ways to record Volunteer Hours.

Recording for a specific contact

Go to the contact's detail page, scroll down to their Volunteer Hours related list, and click on the "**New Volunteer Hours**" button. On the Volunteer Hours edit page, you fill in the lookup for Volunteer Job, and optionally the lookup for Volunteer Shift, which automatically filters the lookup to only show you shifts for the specified job.

To record all the hours for a set of contacts who were assigned to a specific Shift, go to the Shift's detail page, scroll down to the Volunteer Hours related list, and edit each record to input the appropriate status and hours worked.

2.9 Mass Edit Volunteer Hours

In order to make it quick and easy to enter the hours worked for multiple volunteers, or update the status of multiple volunteers, Volunteers for Salesforce also provides a page to enter or modify multiple Volunteer Hours at one time. From the Volunteer Hours related list on the Volunteer Job's detail page or Volunteer Shift's detail page, click on the "**Mass Edit Volunteer Hours**" button. This will bring up the following page:

From this page you can quickly update the status of those people whom you may have already assigned to a job (and shift), as well as enter new people. If the name you enter isn't already a Contact in the database, you can easily create a new Contact by clicking on the Lookup button, and from the Lookup dialog, clicking the "**New**" button. This will give you a popup form where you can quickly create a new Contact in the database.

After you have entered or modified the rows of data, click on the "**Save**" or "**Save & Close**" button. This will save all of your changes to the database, either modifying existing Volunteer Hours records, or creating new Volunteer Hours records. After the save, the page will display the saved records as well as additional new rows, so you can continue entering new data if needed.

Because there can be many shifts and hours associated with a Job when using Job Recurrence Schedules, the page initially filters by a 3 month window from the current date. If you don't see the Shifts or Hours you expect, you can modify the dates to display a greater range.

You can specify which fields on Volunteer Hours are displayed on the Mass Edit Volunteer Hours page. See the *Volunteers for Salesforce Installation & Configuration Guide* for details on how to do this.

2.10 Job Recurrence Schedules

Job Recurrence Schedules allow you to have Shifts automatically created into the future according to the schedule you specify. You are able to specify when the schedule starts and optionally ends, and which days of the week and month the Shift occurs on. To create a Job Recurrence Schedule, go to the Job's detail page, scroll down to the Job Recurrence Schedules related list, and click on the New Job Recurrence Schedule button. This will bring up a page with the following fields:

- Volunteer Job – the Job this schedule is for.

- Days of Week – a multiselect picklist that allows you to specify one or more days of the week the Shift should occur on.

- Weekly Occurrence – a multiselect picklist that allows you to specify one or more weeks of the month that you want the Shift to occur on.

- Schedule Start Date & Time – the date the first Shift should start one, and the Time that all Shifts will start on.

- Schedule End Date – how far into the future you want these Shifts to occur. You can leave it blank if the Shifts should continue indefinitely.

- Duration – how many hours the Shift is.

- Desired Number of Volunteers – how many volunteers you want for the Shift.

- Description – a text field that will be copied to the Description field of each Shift that gets created.

Volunteers for Salesforce provides a schedulable batch process to create these recurring Shifts, and a Custom Settings to allow you to modify this behavior. The setting and batch process are fully described in the *Volunteers for Salesforce Installation & Configuration Guide*.

2.11 Volunteer Recurrence Schedules

Volunteer Recurrence Schedules allow you to assign a specific volunteer to a recurring Job automatically, according to the schedule you specify. You are able to specify when the volunteer wants the schedule to start and optionally end, and which days of the week and month they will work on. To create a Volunteer Recurrence Schedule, go to the Job's detail page, scroll down to the Volunteer Recurrence Schedules related list, and click on the New Volunteer Recurrence Schedule button. Similarly, from a Contact's detail page, you can scroll down to their Volunteer Recurrence Schedules related list, and click on the New Volunteer Recurrence Schedule button. This will bring up a page with the following fields:

- Contact – lookup field to the Volunteer.

- Volunteer Job – the Job they are signing up for.

- Schedule Start Date & Time – the date of the first Shift they want to work and the Time that they will start on. Note that this can be a different time than the Shift starts on.

- Schedule End Date – how far into the future they want to volunteer for this Shift. You can leave it blank if they want to continue indefinitely.

- Duration – how many hours they will work. Note that this can be different that the length of the Shift.

- Volunteer Hours Status – the Status to save on the Volunteer Hours records that get created for the volunteer. This allows you to assign volunteers as either 'Confirmed', or 'Completed', to best match your volunteer management process.

- Days of Week – a multiselect picklist that allows you to specify one or more days of the week the volunteer will work on. Note that this can be a subset of what the Job's recurring schedule is.

- Weekly Occurrence – a multiselect picklist that allows you to specify one or more weeks of the month that the volunteer will work. Note that this can be a subset of what the Job's recurring schedule is.

COPY SCHEDULE FROM

The New Volunteer Recurrence Schedule page also includes a picklist of all Job Recurrence Schedules for the currently specified Job on the page. If you select a Job

Recurrence Schedule from this picklist, the page will then copy the values for Duration, Days of Week, and Weekly Occurrence from the Job Recurrence Schedule to the Volunteer Recurrence Schedule. You can then modify any values as appropriate.

The system process that automatically creates Shifts for the Job Recurrence Schedule also looks at all Volunteer Recurrence Schedules, to assign volunteers to the newly created Shifts.

- The system will assign all volunteers who have a matching Volunteer Recurrence Schedule, rather than stopping at the Shift's Desired Number of Volunteers.

- When a volunteer cannot work an upcoming shift that falls in their Volunteer Recurrence Schedule, you can either:

    o Edit the Volunteer Hours record and specify a status of 'Canceled'.

    o Edit the Volunteer Recurrence Schedule and specify a Schedule End Date before the shift they cannot work. Once they are free again, you will need to remember to update the Volunteer Recurrence Schedule as appropriate.

2.12 Mass Email Volunteers

In order to make it quick and easy to email multiple volunteers at the same time, Volunteers for Salesforce provides a feature to do this. From a Volunteer Job's detail page or Volunteer Shift's detail page, click on the "**Mass Email Volunteers**" button. This will bring up the following page:

You are able to use this page from either a Job or a specific Shift. When using it from a Job, it will include all Shifts that are for that Job, if there are any. In the Status picklist, you are able to specify which Volunteers to include in the email, based off their Volunteer Hours status. The list of Email Templates includes all templates found in the Volunteers Email Templates folder, and you can modify our templates as well as create any additional templates that you would like to use, including those that use a custom letterhead.

You can use the View Templates and Edit Template links to take you to a new window to modify the email templates in the Volunteers Email Templates folder. Note that if you modify a template or create a new template, you will need to refresh the Mass Email Volunteers page in order for the new template and its text to display.

Salesforce imposes a limit on how many emails your organization can send per day, and this is currently 1000. We recommend that if your email quantity pushes up against Salesforce limits, that you consider using a separate bulk emailing product that integrates with Salesforce.

If you receive an error that only occurs when "**Log an Activity for each Contact**" is checked, ensure that the Volunteer Job and Volunteer Shift custom objects have the "**Allow Activities**" option set. Refer to the *Volunteers for Salesforce Installation & Configuration Guide* for detailed instructions on how to set this up.

2.13 Shift Calendar

The Shift Calendar tab displays a page which shows all of the active Volunteer campaign Shifts in the chosen month. You are able to filter by a specific campaign, a specific job, or both. You can also change the view between Month, Week, and Day views.

Clicking on a Shift will take you to that shift's detail page. If you switch to Week or Day views, you will see additional information about each shift, including the number of volunteers who are confirmed (or completed), and the number of volunteers still needed. There is also a Roster hyperlink that will bring up the Volunteer Roster report, filtered for the specific shift. The Volunteer Roster report can also be opened from a button on a Volunteer Campaign, Job, or Shift's detail page. If you are upgrading Volunteers for Salesforce from an earlier version, and you don't see the Volunteer Roster buttons on your page layouts, refer to the *Volunteers for Salesforce Installation & Configuration Guide* for detailed instructions on how to set this up.

From a Volunteer Campaign, Job, or Shift's detail page, there is a button "Shift Calendar" than can be used to go to the Shift Calendar tab, pre-filtered for the specific Campaign, Job, or Shift. If you are upgrading Volunteers for Salesforce from an earlier

version, and you don't see the Shift Calendar buttons on your page layouts, refer to the *Volunteers for Salesforce Installation & Configuration Guide* for detailed instructions on how to set this up.

From the Shift Calendar tab, one can also print the Calendar in its current view. Just open the tab, filter it as appropriate, choose your view, and then click on the Printable View link on the upper right of the page.

2.14 Find Volunteers

The Find Volunteers tab displays a page you can use to find volunteers who match your requirements, and optionally assign them to a job or shift. The page consists of three sections. In the Criteria section, you are able to choose various criteria for finding

appropriate volunteers. See the *Volunteers for Salesforce Installation & Configuration Guide* to see how you can add additional Contact fields to the Criteria section.

After selecting your criteria from any or all of the fields, click on the Find button. This will then display the Volunteers section which will display all Contacts that match your criteria.

Check off the Contacts you want to assign to a Job or Shift, fill out the details, and click Assign in the next section to assign them to a Job or Shift, specifying what Status to record, and optionally how many hours to set.

In addition to accessing the Find Volunteers page from its tab, you can also use the Find Volunteers button found on the Volunteers Campaign detail page, Job detail page, and Shift detail page. See the *Volunteers for Salesforce Installation & Configuration Guide* to see how you can add these buttons to the appropriate page layouts.

2.15 Reports

Volunteers for Salesforce provides a set of useful reports to help your organization easily report on Volunteer data. These reports can be found in the Volunteers Reports folder under the Report tab in Salesforce.

Report Name	Description
Active Volunteers	list of Contacts with Active Volunteer Status
Available Volunteer Jobs	All Volunteer Jobs that are ongoing, or need people.
Inactive Volunteers	list of Contacts with Inactive Volunteer Status
New Sign Ups - Contacts	list of Contacts with New Sign Up Volunteer Status
New Sign Ups - Leads	list of Leads with New Sign Up Volunteer Status
Prospective Volunteers	list of Contacts with Prospective Volunteer Status
Recent Volunteers	list of volunteers whose last volunteer date was in the last 120 days
Top Volunteers by Lifetime Hours	FOR DASHBOARD: list of total worked hours by volunteer
Top Volunteers by Recent Hours	FOR DASHBOARD: list of total worked hours by volunteer in the specified Time Frame.
Unassigned Volunteers	All Active, Prospective, and New Signup Volunteers who have no current Volunteer Hours assigned.
Unique Volunteers	Summary count of unique volunteers by Campaign and Job.
Upcoming Shifts Needing Volunteers	Shifts in the future with unfilled volunteer shifts.
Upcoming Shifts with Volunteers	All upcoming shifts with volunteers confirmed. Can be used as a check-in sheet.
Upcoming Volunteers	list of all Volunteers with Hours in the next 30 days
Volunteer Hours by Account	Total volunteer hours for each account for all time.
Volunteer Hours by	Total of all volunteer hours for volunteer campaigns for all time.

Campaign	
Volunteer Hours by Job	Total of all volunteer hours by unique job name for all time.
Volunteer Hours by Month	Volunteer hours grouped by month for current and previous year.
Volunteer Hours This Year	Volunteer hours this year for all contacts.
Volunteers Active Last Month	Volunteers with completed hours on a Volunteer Job last month.
Volunteers by Account	list of volunteers grouped by Account
Volunteers by Availability	List of volunteers grouped by their availability.
Volunteers by Skill	list of volunteers, grouped by skills
Volunteers Last Month	FOR DASHBOARD: Volunteers this year.
Volunteers This Year	FOR DASHBOARD: Volunteers this year.
Volunteers with any Volunteer Status	All volunteers with status set to any value.

2.16 Dashboard

Volunteers for Salesforce provides a dashboard for the Volunteer Manager, which displays useful summary data about volunteers and their related information.

- Top Volunteers by Lifetime Hours (table)
- Top Volunteers by Recent Hours (table)
- Number of Volunteers by Status (pie chart)
- Volunteer Hours Completed by Month (bar chart)
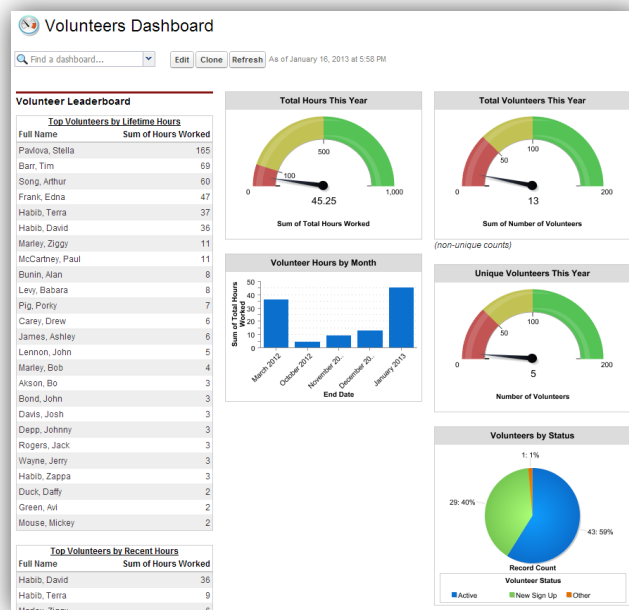
3. WEBSITE INTEGRATION

Volunteers for Salesforce makes use of Salesforce Sites, to allow you to host Salesforce web pages on your organization's website, to display and record volunteer information. These Site pages are designed with a set of custom style tags, so that you can define what the styling looks like. They are intended to be hosted within an iframe tag, so that they appear as native pages in your website. Refer to the *Volunteers for Salesforce Installation & Configuration Guide* for detailed instructions on how to set this up.

3.1 Supporting Volunteer Sign Up on Your Website

Volunteers for Salesforce provides a Sites page which allows someone to visit your website, and notify you of their desire to volunteer in general. You control the Availability and Skills values that appear in the multi-select picklists. When the form is submitted, Volunteers for Salesforce will try to find an existing Contact record in your Salesforce database, matching by First Name, Last Name, and Email. If an existing Contact record is found, we will then update their Volunteer information. If no matching Contact record is found, we will create a new Contact record. The person's Volunteer Status field will be set to "**New Sign Up**", allowing the volunteer manager to easily find them for follow up.

Volunteers for Salesforce provides a set of Custom Settings to allow you to modify this behavior. The settings are fully described in the *Volunteers for Salesforce Installation & Configuration Guide*.

After the user submits their info, Volunteers for Salesforce will optionally send an automatic email, based off an email template, thanking them for signing up. Volunteers for Salesforce will also send an optional email to the volunteer manager, letting them know about the new sign up. Workflow Rules and Alerts control these automatic notifications. Please see the *Volunteers for Salesforce Installation & Configuration Guide* for details.

Below is a picture of the Volunteer Signup form that you can include via iframe in your website.

First Name *	Johnny
Last Name *	Doe
Email *	johnny@doe.com
Work Phone	(425) 111-2222
Home Phone	(206) 333-4444
Company	Energy Solutions Inc.

Skills

Available:
- Manual labor
- Marketing
- Fundraising
- Landscaping

Chosen:
- Computer usage
- Event Planning

Availability

Available:
- Weekdays
- Afternoon
- Weekly

Chosen:
- Weekends
- Morning

Please tell us what type of volunteer work you might be interested in.

I'd like to help with your annual auction, and I know a great auction management package for Salesforce that I can help you install.

Submit

Please see the *Volunteers for Salesforce Installation & Configuration Guide* for full details on how to go about integrating this form into your website.
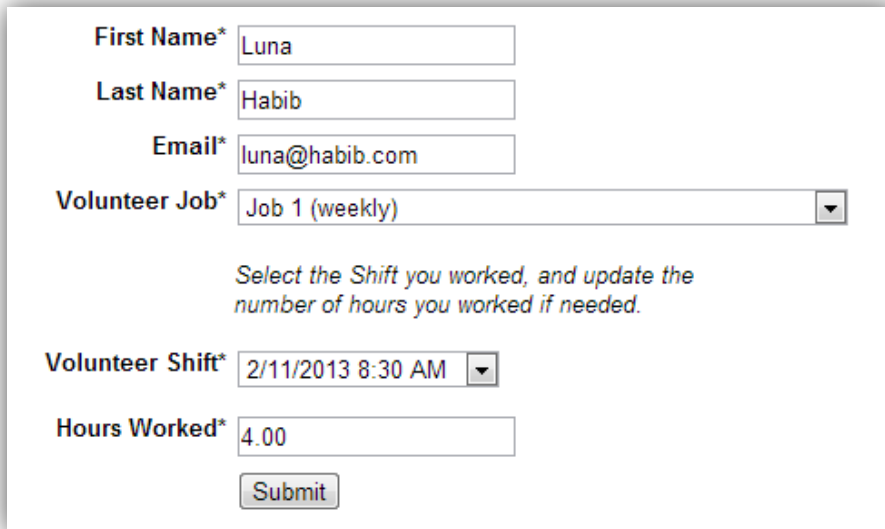
3.2 Supporting Job Listing and Sign Up on Your Website

Volunteers for Salesforce also provides a separate Sites page that you can include on your website via iframe for displaying available jobs, and optionally shifts. It also allows a person to signup for a specific job and optionally a Shift. Here's what that looks like:

Please see the *Volunteers for Salesforce Installation & Configuration Guide* for full details on how to integrate this form into your website.

3.3 Supporting Job Shift Calendar on Your Website

Volunteers for Salesforce also provides a separate Sites page that you can include on your website via an iframe for displaying job shifts on a calendar. It also allows a person to signup for a specific job shift. Please see the *Volunteers for Salesforce Installation & Configuration Guide* for full details on how to integrate this form into your website.

3.4 Supporting Volunteer Hours Reporting on Your Website

Volunteers for Salesforce also provides a separate Sites page that you can include on your website via an iframe for displaying a form that volunteers can use to report the hours they have worked for your organization. It allows them to select the specific job and shift they worked, or report on hours for a longer time period, e.g., all hours they volunteered in the last month. Please see the *Volunteers for Salesforce Installation & Configuration Guide* for full details on how to integrate this form into your website.

First Name*	Luna
Last Name*	Habib
Email*	luna@habib.com
Volunteer Job*	Job 1 (weekly) ▼

Select the Shift you worked, and update the number of hours you worked if needed.

Volunteer Shift*	2/11/2013 8:30 AM ▼
Hours Worked*	4.00

Submit

3.5 Volunteers Personal Site

In addition to the Sites pages previously listed, Volunteers for Salesforce also supports a Personal Site that you can send your Volunteers to, where they will be able to see their Contact and Volunteer information, their upcoming Job Shifts, and their Volunteer History. This functionality is a little different in that you do not IFRAME it into your website. Instead, you style the supplied Template file, so you can make the Volunteer Personal Site compliment your website. Please see the *Volunteers for Salesforce Installation & Configuration Guide* for full details on how to integrate this form into your website.

4. EMAIL TEMPLATES

Volunteers for Salesforce provides the following customizable email templates:

Template	Description
Volunteer Signup Thank You	A simple acknowledgement email thanking the contact or lead for signing up to be a volunteer.
Volunteer Signup Notification	A notification message to the Volunteer Manager that a new volunteer signup has occurred.
Volunteer Shift Reminder	A reminder message to send to all volunteers about their upcoming shift.
Volunteer Shift Reminder (using letterhead)	A reminder message to send to all volunteers about their upcoming shift.
Volunteer Job Reminder	A reminder message to send to all volunteers about their upcoming job (for those jobs without shifts).
Volunteer Job Reminder (using letterhead)	A reminder message to send to all volunteers about their upcoming job (for those jobs without shifts).
Volunteer Hours Reminder Email (new in 3.0)	A reminder message to use with the time based workflow to automatically remind volunteers of their upcoming Shift.
Volunteer Job Signup Notification (new in 3.0)	A notification message to the Volunteer Manager that a new volunteer Job/Shift signup has occurred.
Volunteer Job Signup Thank You (new in 3.0)	A thank you message sent to a volunteer when they sign up for a job or shift from the Sites page.

Please see the *Volunteers for Salesforce Installation & Configuration Guide* for full details on how to modify these email templates, and information about where they are used.

5. FREQUENTLY ASKED QUESTIONS

We actively manage a list of frequently asked questions on our website at:
http://djhconsulting.com/volunteers-for-salesforce/volunteers-for-salesforce-faq/

APPENDIX: SALESFORCE SCHEMA

The diagram below shows the Salesforce objects used in Volunteers for Salesforce. The straight lines represent a parent-child relationship between the two objects. The dotted line represents a lookup from one object to another. Rollup fields are automatically handled by Salesforce. Code Rollup fields are handled by triggers provided in the package.

Volunteers for Salesforce Objects