



2015 Training Module 02

Organisations

Version: May 15

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Introduction

Milo holds information about all different types of organisations e.g.:

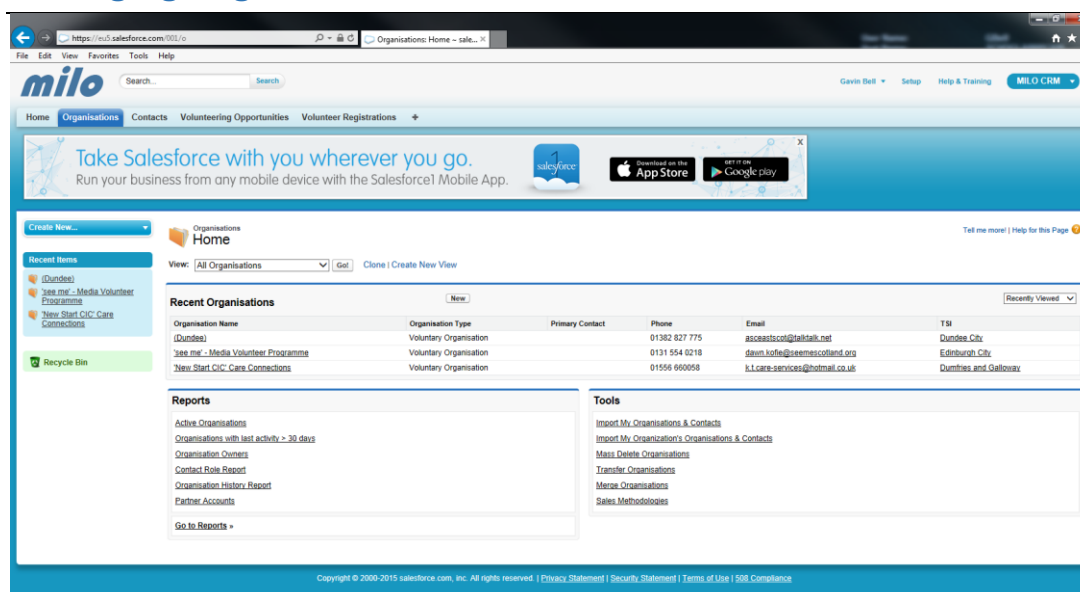
- Voluntary Organisations
- Statutory Organisations
- Private Companies
- Partnership/Networks
- Educational establishments

These are managed using the **Organisations** object in Milo.

For an Organisation, Milo provides a wide range of fields in which data can be recorded. It also allows a number of **locations** to be linked to the Organisation, where an organisation has a number of offices, shops etc. It also allows **contacts** to be linked to an organisation, holding details of the role and the location at which they work.

Organisation records are the heart of the system. Most other parts of the system interact with organisations in some way, including contacts, volunteer opportunities, interactions and memberships.

Managing Organisations in Milo



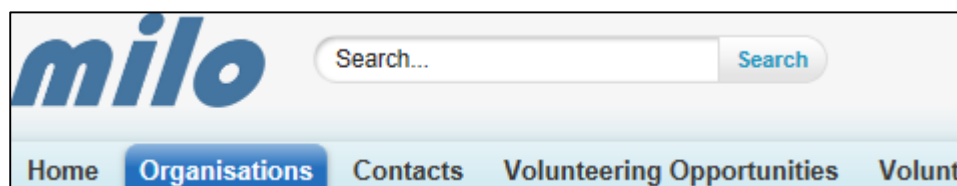
Navigate to Organisations - Home

Click on the Organisations tab at the top of the screen to go to the Organisations home page. By default, you will see a list of recent organisations you have accessed. By clicking on the View dropdown above the list of recent organisations, you can select 'All Organisations', which will provide an alphabetised list of every organisation on the system.

When you create your own views, these will be available from this dropdown.

Search for an organisation

You can search for any record on the database using the Global Search box at the top of every screen.



To search for an organisation, simply type the name or part of the name into the search box. You can use * as a wildcard. Try typing 'Pet Fostering'. You will now see any contacts, interactions, organisations, volunteer opportunities or volunteer registrations associated with the search phrase.

Alternatively, you can use views (see module 01) to set up a specific filter for organisations, e.g. all organisations in your TSI area, all organisations flagged as social enterprises. The standard My Organisations view will return all contacts you have accessed recently.

Whichever method you use will return a list of organisations. Click on any of the organisation names to access the record.

View and edit an organisation

When you click into an organisation record, you will see the organisation view screen. As in the old system, data in each record is organised into a number of sections. Scroll down to see the data held on an organisation, broken down into:

- Organisation details
- Basic Profiling Data
- Neighbourhoods Served
- Aims & Objectives
- Policies and Quality Standards

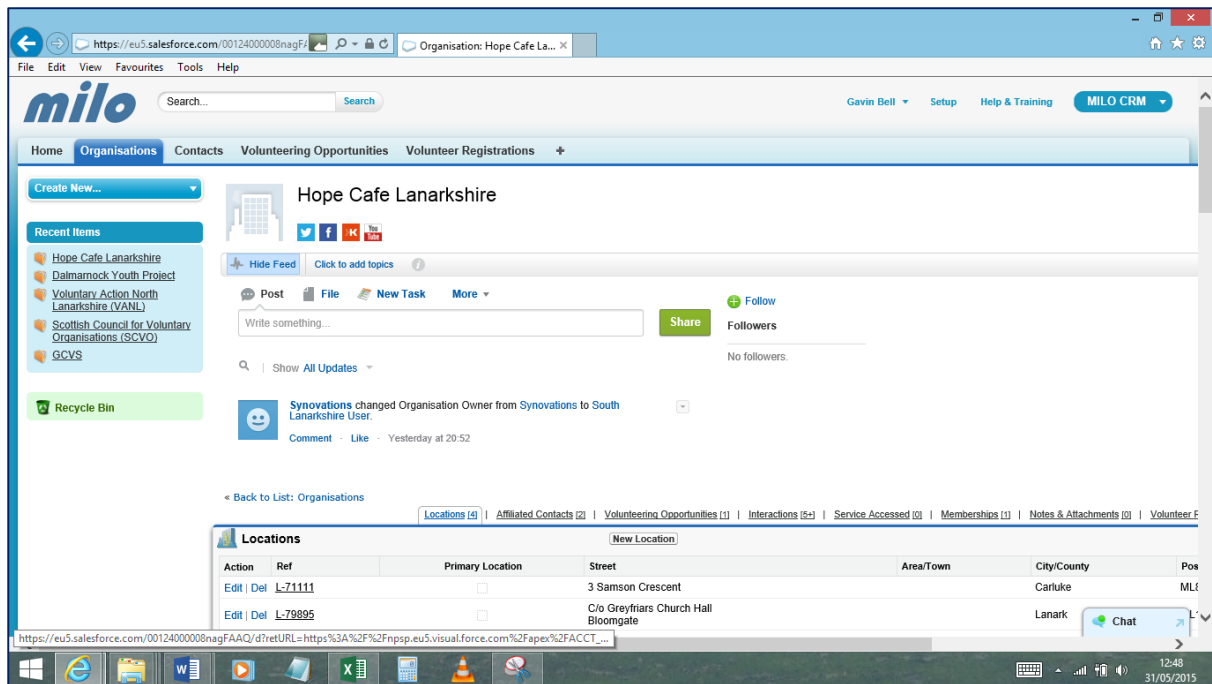
The screenshot shows the Milo CRM interface for the 'Pet Fostering Service Scotland (Callander)' organisation. The page is divided into several sections: a top navigation bar with the Milo logo and search bar; a sidebar with 'Recent Items' and a 'Recycle Bin'; a main content area with a feed, a 'Follow' button, and various tabs for 'Locations', 'Affiliated Contacts', 'Volunteering Opportunities', 'Interactions', 'Service Accessed', 'Memberships', and 'Notes & Attachments'. The 'Organisation Detail' section shows fields for TSI, Organisation Name, Organisation Type, and Contact Information. The 'Basic Profiling Data' section includes fields for Registered Charity Status, Registered Charity Number, Legal Status, Company Number, Main Activities, and Specific Goods Services Detail.

Associated entities are displayed at the bottom of the screen. This is where you can view any **locations, contacts, volunteering opportunities, interactions** or **membership** records associated with the organisation record.

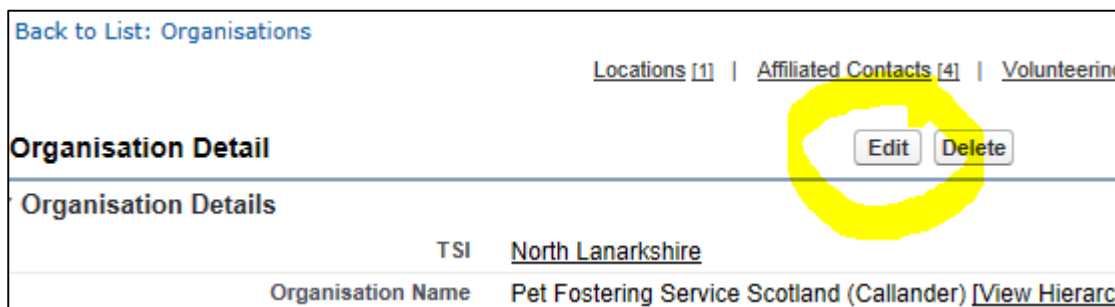
The screenshot shows the 'Associated entities' section of the Milo CRM interface. It contains several tables and sections:

- Locations:** A table with columns: Action, Ref, Primary Location, Street, Area/Town, City/County, Postcode, Phone Number. It shows one record with Ref L-12120.
- Affiliated Contacts:** A table with columns: Action, Affiliation: Affiliation Name, Primary, Deleted, First Name, Last Name, Role, Status, Start Date, End Date. It shows four records for Natalie Hoag, Anne Docherty, Bob Sinclair, and Dot Taylor.
- Volunteering Opportunities:** A section with a 'New Volunteering Opportunity' button and 'No records to display'.
- Interactions:** A section with a 'New Interaction' button and 'No records to display'.
- Service Accessed:** A section with a 'New Service Accessed' button and 'No records to display'.
- Memberships:** A section with a 'New Membership' button and 'No records to display'.
- Notes & Attachments:** A section with a 'New Note' button and 'No records to display'.

You can also see these entities at the top of the organisation record. Hover the pointer over one of them to see associations, e.g. locations:



To make changes to an organisation, click on the **Edit** button at the top of the screen.



The page will open in edit view, allowing you to update and change any data on the organisation, if you have permission to do so.

Organisation Edit
Pet Fostering Service Scotland (Callander)

Organisation Details

TSI: North Lanarkshire
 Organisation Name: Pet Fostering Service Scotland (Callander)
 Organisation Type: Voluntary Organisation
 Larger Organisation Details: [Search]
 Additional Previous Names For Org: [Text Field]
 Org Activities Social Enterprise: --None--

Website: www.pfss.org.uk
 Email: volunteeringwithpfss@yahoo.co.uk
 Phone: 0844 811 9909 OPTION 5
 Publish To Local Directory: []

Basic Profiling Data

Registered Charity Status: []
 Registered Charity Number: [Text Field]
 Legal Status: Migration Unknown
 Company Number: [Text Field]
 Main Activities Global: [List of activities: Additions, Advice / Information, Advocacy, Animal Welfare, Arts And Culture, Befriending / Mentoring, Black / Minority Ethnic, Campaigning / Lobbying, Carers]
 Main Activities TSI Specific: [List of activities: Miscellaneous, [Unknown], 1) Armandale & Eskdale Locality, 10) SOA 6 - Environment & Sustainability, 2) Nithsdale Locality, 3) Stowards Locality]

Date Established: 11/05/2015
 Dormant Date: 11/05/2015
 Date Ceased To Exist: 11/05/2015
 Date Due To Ceased: 11/05/2015
 Reason Ceased To Exist: --None--

Further Details Ceased To Exist: [Text Field]

Create a new organisation

The easiest way to create any new record is to use the **Create New...** button on the left hand side of the page.

Create New...

Organisations
Home

View: D&G postcodes [Go] Clone | Create New View

Recent Organisations

Organisation Name	Organisation Type	Primary Contact	Phone	Email	TS
Pet Fostering Service Scotland (Callander)	Voluntary Organisation		0844 811 9909 OPTION 5 THEN 1	volunteeringwithpfss@yahoo.co.uk	TS
(Dundee)	Voluntary Organisation		01382 827 775	asceastscot@talktalk.net	Du
'see me' - Media Volunteer Programme	Voluntary Organisation		0131 554 0218	dawn.kofie@seemescotland.org	Ed
'New Start CIC' Care Connections	Voluntary Organisation		01556 660058	k.t.care-services@hotmail.co.uk	Du

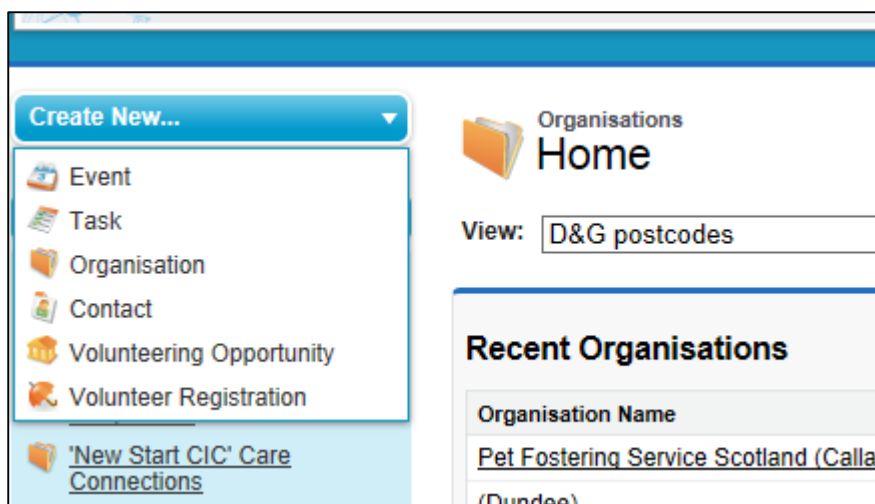
Reports

- Active Organisations
- Organisations with last activity > 30 days
- Organisation Owners
- Contact Role Report
- Organisation History Report
- Partner Accounts

Tools

- Import My Organisations & Contacts
- Import My Organization's Organisations & Contacts
- Mass Delete Organisations
- Transfer Organisations
- Merge Organisations
- Sales Methodologies

Click on **Create New...** and you will see the option to create a new Event, Task, Organisation, Contact, Volunteering Opportunity, or Volunteer Registration.



Select **Organisation**, and a New Organisation input page will appear. This looks the same as the edit screen, but is blank to allow you to input a new organisation.

As in the previous system, some fields in each record type are mandatory. These are signified by a red bar next to the mandatory fields. You cannot save until all of these fields have been completed.

Once you have added the mandatory fields plus any other information, click **Save**.

You will then see the view organisation screen as before:

MILO CRM

Home Organisations Contacts Volunteering Opportunities Volunteer Registrations +

Take Salesforce with you wherever you go. Run your business from any mobile device with the Salesforce1 Mobile App.

Create New... Recent Items: New org 1, Pet Fostering Service Scotland (Callander) (Dundee), 'see me' - Media Volunteer Programme, 'New Start CIC' Care Connections, Recycle Bin

New org 1

Hide Feed Click to add topics

Post File New Task More

Write something... Share Follow

No followers.

There are no updates.

Back to List: Organisations

Locations | Affiliated Contacts | Volunteering Opportunities | Interactions | Service Accessed | Memberships | Notes & Attachments

Organisation Detail Edit Delete

Organisation Details

TSI

Organisation Name New org 1 (View Hierarchy)

Organisation Type Voluntary Organisation

Larger Organisation Details

Additional Previous Names For Org

Org Activities Social Enterprise

Website

Email

Phone

Publish To Local Directory

Basic Profiling Data

Registered Charity Status

Registered Charity Number

Legal Status Company

Company Number

Main Activities Global

Main Activities TSI Specific

Specific Goods Services Detail

Date Established

Dormant Date

Date Ceased To Exist

Date Due To Ceased

Reason Ceased To Exist

Further Details Ceased To Exist

Helpline Type

Helpline Phone Number

Adding locations, contacts, opportunities etc.

You can now begin associating locations, contacts, etc. with your new organisation. To add a new location hover over 'Locations' and click 'New Location'.

MILO CRM

Home Organisations Contacts Volunteering Opportunities Volunteer Registrations +

Create New... Recent Items: New org 1, Pet Fostering Service Scotland (Callander) (Dundee), 'see me' - Media Volunteer Programme, 'New Start CIC' Care Connections, Recycle Bin

New Location

Location Edit Save Save & New Cancel

Information

Legacy Ref

Organisation New org 1

Primary Location

Home Address

Street

Area/Town

City/County

Postcode

Phone Number

Fax Number

Opening Hours Monday

Opening Hours Tuesday

Opening Hours Wednesday

Opening Hours Thursday

Opening Hours Friday

Opening Hours Saturday

Opening Hours Sunday

Accessible Premises

Accessible Parking

Accessible Toilets

Other Access Issues

Version

Created On 11/05/2015

Amended On 11/05/2015

Legacy Created By

Legacy Amended By

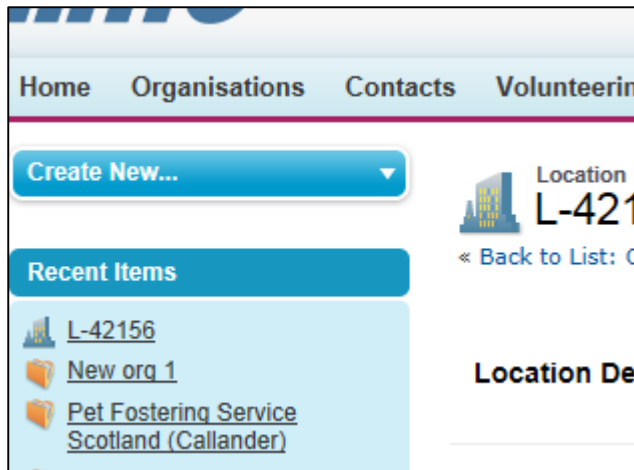
Save Save & New Cancel

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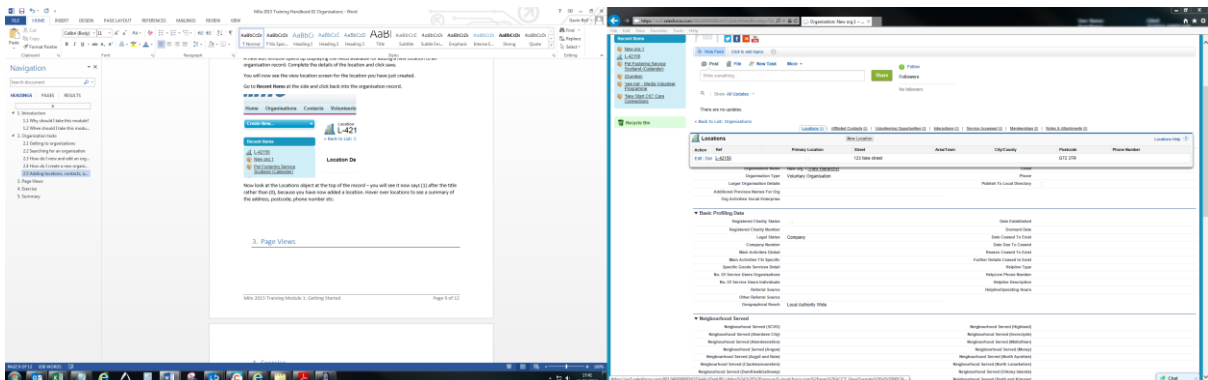
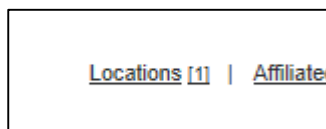
A new edit window opens up displaying the fields available for adding a new location to an organisation record. Complete the details of the location and click save.

You will now see the view location screen for the location you have just created.

Go to **Recent Items** at the side and click back into the organisation record.



Now look at the Locations object at the top of the record – you will see it now says (1) after the title rather than (0), because you have now added a location. Hover over locations to see a summary of the address, postcode, phone number etc.



Summary

In the **Organisations** module, we have covered:

- Navigating to the Organisations home screen
- Searching for an organisation
- View/edit organisation records
- Create a new organisation
- Adding locations, contacts, opportunities etc.

These skills are transferrable across the other Milo objects (Volunteer Opportunities, Registrations etc.). You can use the same techniques to navigate around Milo and start to explore the other features Milo has to offer.

Remember – for more step by step advice, see the individual training modules. If you have any problems or get stuck, you can contact the Milo team at milosupport@scvo.org.uk