



2015 Training Module 00

Quick Start Guide

Version: May 15

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Introduction

The quick start guide is intended for users who want to start working with Milo straight away. For a more in-depth, step-by-step guide, please see the individual modules for each section of the database:

- 01 Getting Started
- 02 Organisations
- 03 Contacts
- 04 Volunteer Registrations and Placements
- 05 Volunteering Opportunities and Placements
- 06 Interactions
- 07 Membership
- 08 Dashboards
- 09 Tasks and Events
- 10 Reporting

This module will allow you to get logged in and using the system.

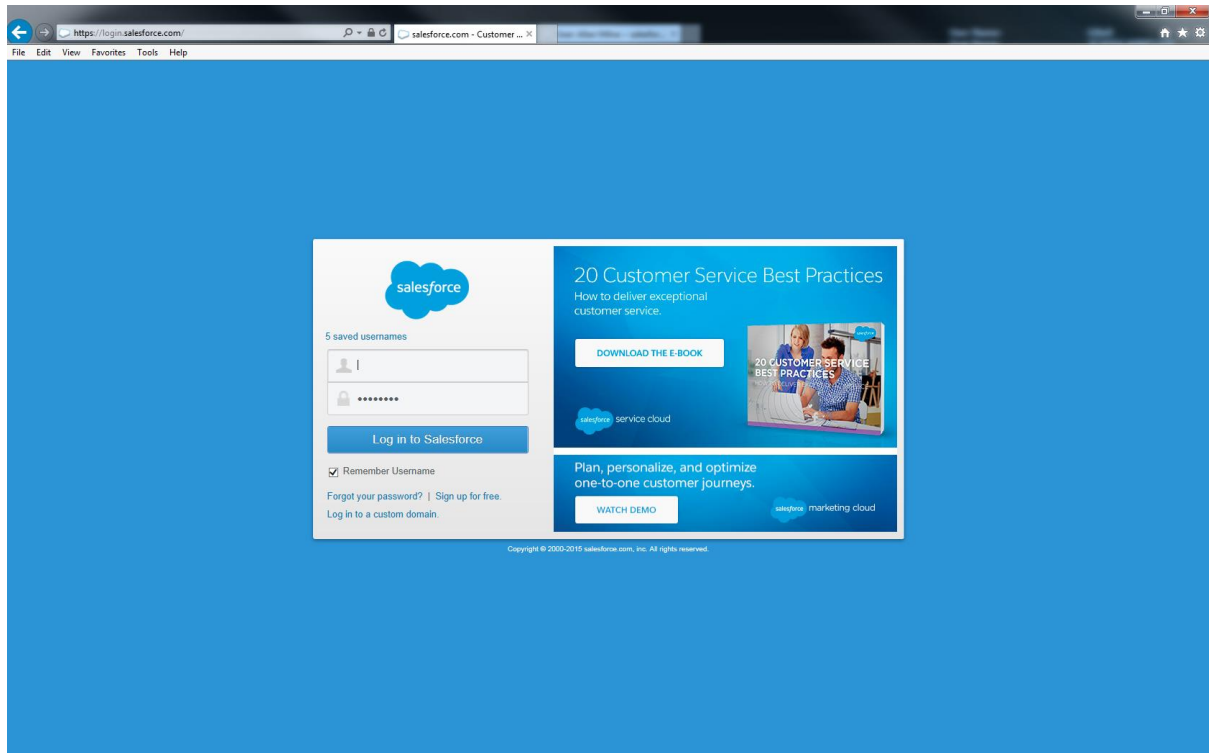
For the most part, Milo 2 uses the same data types (organisations, contacts, opportunities) as the original Milo system, so once you become accustomed to the new user interface, it should be fairly straightforward to navigate around the system as before.

Logging in

All Milo users require a named licence. If you do not have a licence, please contact your local Milo lead to find out if one has already been assigned to you.

When you are set up on the system as a user, you will receive an automated email with details of how to log in and a URL. You must create your own password on first-time login. Don't worry – it is possible to reset passwords in the event you forget them.

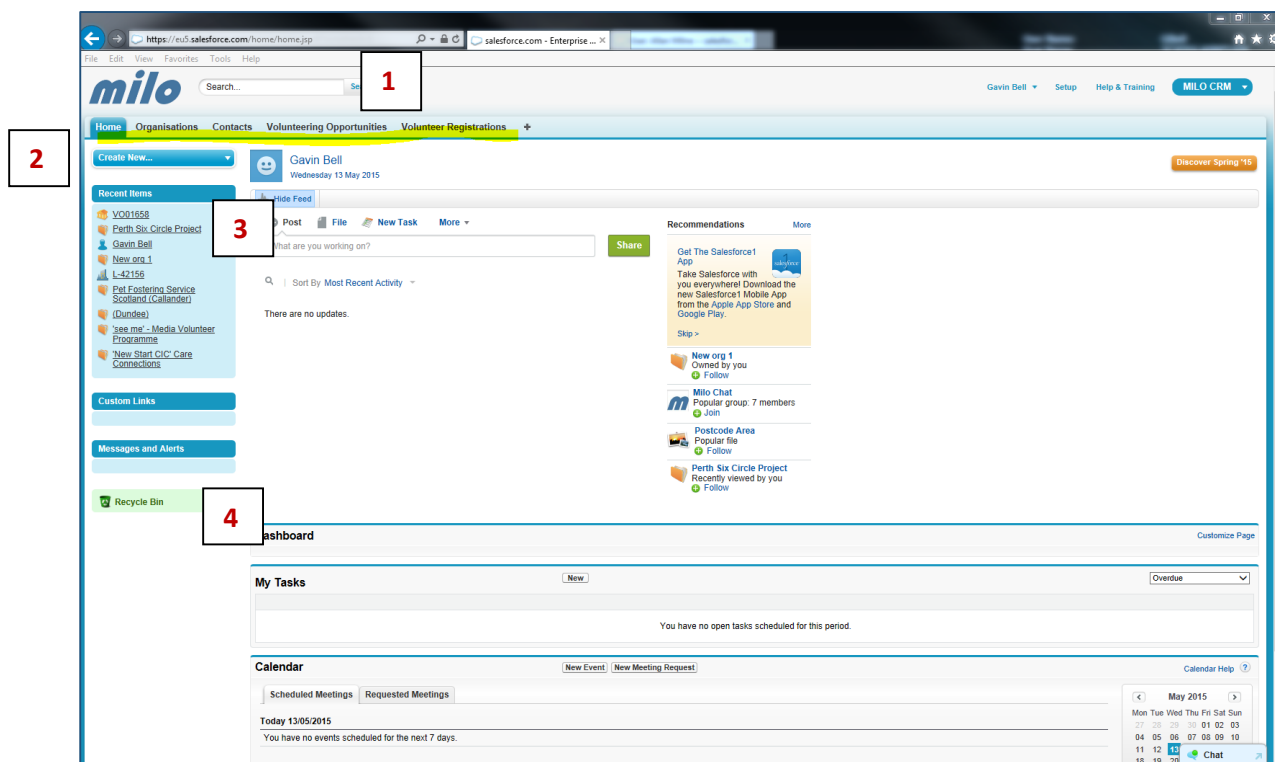
To access Milo, go to <https://login.salesforce.com/> and enter your details.



First steps and features

The home screen

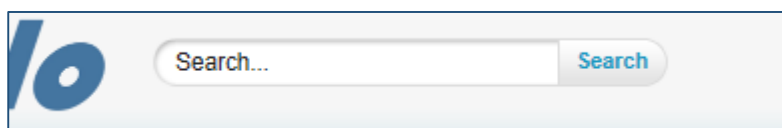
On login, you will be taken to your home screen – this is where you can see an overview of recent activity, live tasks and events, and any dashboards you have set up. You will see that along the top left of the screen there are several tabs relating to different Milo entities (highlighted below):



Important features

There are some helpful and time-saving features (numbered above) available for use throughout the system – it's important to be aware of them before you get started, as they **will** save you some time!

1. Search



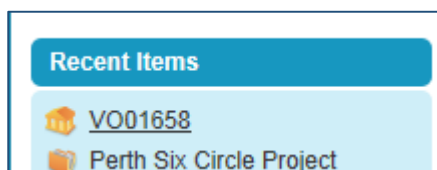
One of the key differences in the new system is that there is now a global system-wide search. The search field is a bit like Googling within Milo – enter any organisation or contact name to find matching results and associations. If you want to use partial words, remember to add an asterisk [*] as a wildcard.

2. Create new



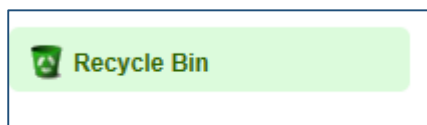
Create new allows you to create a new organisation, contact, opportunity, event or task without going anywhere else in the system (though of course, you should always make sure a record for a new contact etc. doesn't exist yet!).

3. Recent Items



This list will be blank the first time you log in. but as you investigate the system and open more records, your recent history will appear here – very useful for clicking back into a record you were working on earlier in the day without having to search.

4. Recycle bin



Lastly, if you accidentally delete a record, fear not – there's now a recycle bin so you can view and restore recently-deleted items if necessary.

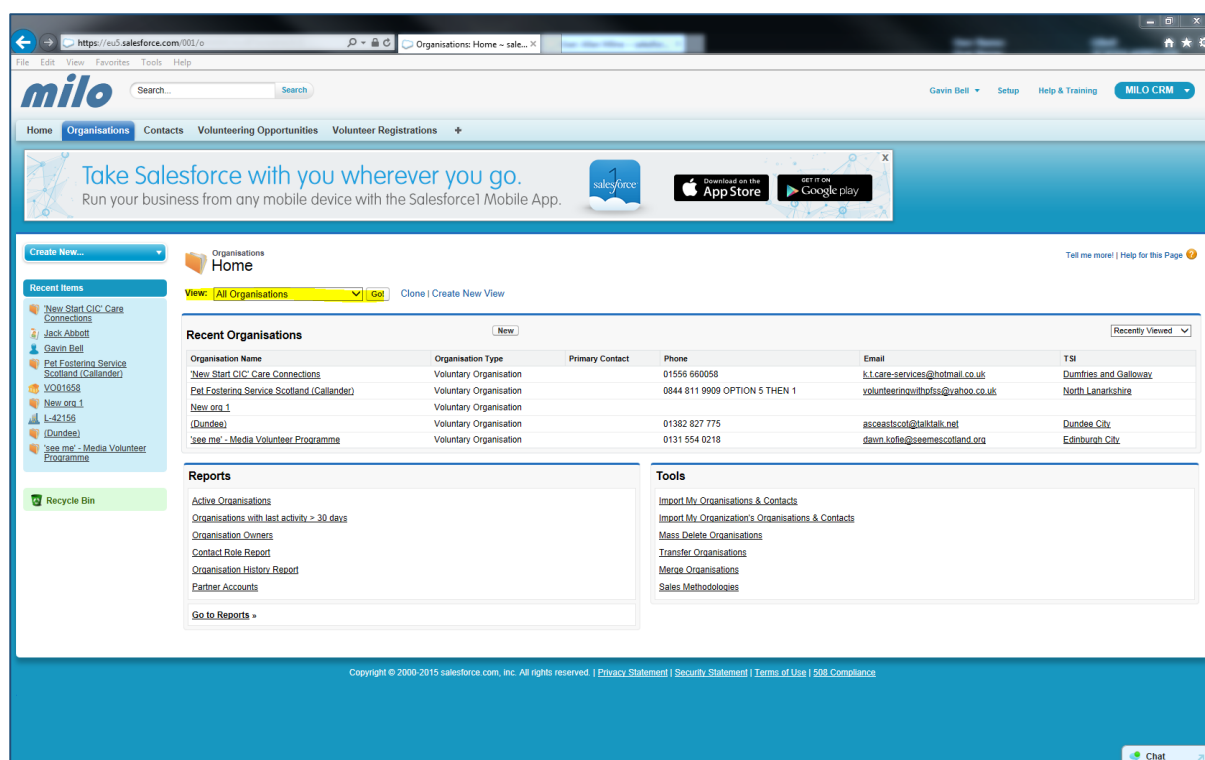
Search for, access and edit an organisation

The Organisations tab

The steps used to access each area of Milo are the same, so once you get comfortable with organisations you should be able to access opportunities, contacts etc. with no problem.

For the quick start example, we're going to look at searching for, accessing and editing an **organisation**. You could look for a specific record by using the global search, of course, but this is what to do if you want to select from a list of organisations.

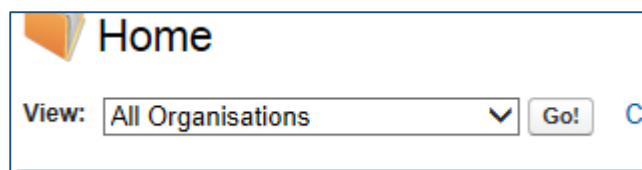
The first thing to do is click on the Organisations tab at the top of the screen to get to the Organisations home screen:



The Recent Organisations list will be blank, as you haven't accessed any records yet. Once you have spent some time on the system, the last 5 organisation records you accessed will display.

To see some organisation records, you will need to select a view from the dropdown list (highlighted above).

Views



Customisable views are one of the most powerful features of Salesforce. Using these you can create your own unique lists of organisations, contacts, etc. you want to use regularly. If you like, you can

experiment by clicking on 'Create new view' and choosing which fields you want to filter on. See module 01 for more on views.

In the meantime, we just want to access a record, so select the 'All Organisations' view from the dropdown menu and you will see an alphabetical list of every organisation on the database. Click into any record and you will be able to view the organisation page.

Organisation page

The screenshot shows the Milo CRM interface for the 'New Start CIC' Care Connections organisation. The page is divided into several sections:

- Recent Items:** A list of recent items including 'New Start CIC Care Connections', 'Jack Abbott', 'Gavin Bell', 'Pet Fostering Service Scotland (Callander)', 'V021556', 'New org 1', 'L-42156 (Dundee)', and 'See me - Media Volunteer Programme'.
- Organisation Detail:** A section containing fields for 'Organisation Name', 'Organisation Type', 'Larger Organisation Details', 'Additional Previous Names For Org', and 'Org Activities Social Enterprise'.
- Basic Profiling Data:** A section containing fields for 'Registered Charity Status', 'Registered Charity Number', 'Legal Status', 'Company Number', 'Main Activities Global', 'Main Activities TSI Specific', 'Specific Goods Services Detail', 'No. Of Service Users Organisations', 'Date Established', 'Dormant Date', 'Date Ceased To Exist', 'Date Due To Ceased', 'Reason Ceased To Exist', 'Further Details Ceased To Exist', 'Helpline Type', and 'Helpline Phone Number'.
- Clickable Object Titles:** A row of clickable object titles is highlighted in yellow: [Locations \[1\]](#), [Affiliated Contacts \[1\]](#), [Volunteering Opportunities \[0\]](#), [Interactions \[0\]](#), [Service Accessed \[4\]](#), [Memberships \[0\]](#), and [Notes & Attachments \[0\]](#).

This page is a streamlined version of the organisation record from Milo, omitting the many unused fields on the original database.

As in the old system, fields are grouped into different sections: Organisation Details, Basic Profiling, Aims & Objectives etc.

You can expand or contract each section by clicking on the arrow next to the section title. The system will remember which sections you have hidden, so you don't have to collapse them each time.

The fields are arranged in roughly the same order on Milo 1, so if you were familiar with the old layout, everything should be where you expect it to be.

Associated objects

Above the organisation details is a row (highlighted above) of clickable object titles: locations, contacts, opportunities etc.

The screenshot shows a row of clickable object titles: [Locations \[1\]](#), [Affiliated Contacts \[1\]](#), [Volunteering Opportunities \[0\]](#), [Interactions \[0\]](#), [Service Accessed \[4\]](#), [Memberships \[0\]](#), and [Notes & Attachments \[0\]](#). Below the row are 'Edit' and 'Delete' buttons.

This lets you see at a glance if the organisation has any of these objects associated with it – giving you the number of associations in brackets. If you hover the pointer over these titles, you will see a summary of the different locations, contacts, volunteer opportunities, interactions etc associated with this organisation.

You can also see a summary of all associated objects by scrolling to the bottom of the organisation screen:

The screenshot displays the Salesforce interface for an organisation named 'Synovations'. At the top, there are policy links (Health Safety, Volunteer Policy, Child Protection Policy) and equality/diversity information. The 'System Information' section shows the organisation was created by 'Synovations' on 25/11/2014 and last modified by 'test1' on 17/03/2015. Below this, several tabs are visible: 'Locations', 'Affiliated Contacts', 'Volunteering Opportunities', 'Interactions', 'Service Accessed', 'Memberships', and 'Notes & Attachments'. The 'Locations' tab is currently selected, showing a table with one record: 'Chapelton Cottage Haugh of Urr' in 'Castle Douglas' with postcode 'DG7 3ET'. Other tabs like 'Affiliated Contacts' and 'Service Accessed' also show data tables. The footer contains copyright information and a 'Chat' button.

Editing an organisation

If you want to amend or add data to a record, simply click on the Edit button above Organisation Detail:

This screenshot shows the top navigation bar of the Salesforce organisation detail page. It features a series of links for different object types: 'Locations [1]', 'Affiliated Contacts [1]', 'Volunteering Opportunities [0]', and 'Interactions [0]'. Below these links, there are two buttons: 'Edit' and 'Delete'. The 'Edit' button is highlighted, indicating it is the one to click for editing the organisation record.

This will open the record in edit view (please note, ability to edit a record is dependent on user permissions):

Organisation Edit

Organisation Details

TSI: Dumfries and Galloway

Organisation Name: **New Start CIC' Care Cor**

Organisation Type: **Voluntary Organisation**

Website:

Email:

Phone:

Publish to Local Directory: ☐

Basic Profiling Data

Registered Charity Status: ☐

Registered Charity Number:

Legal Status: **Not applicable - e.g. statutory, private company**

Date Established:

Dormant Date:

Date Ceased To Exist:

Date Due To Ceased:

Reason Ceased To Exist:

Main Activities Global:

Available: Additions, Advice / Information, Advocacy, Animal Welfare, Arts And Culture, Befriending / Mentoring, Black / Minority Ethnic, Campaigning / Lobbying, Carers

Chosen:

Main Activities TSI Specific:

Available: [Miscellaneous], [Unknown], 1) Annandale & Eskdale Locality, 10) SOA 6 - Environment & Sustainability, 2) Nithsdale Locality, 3) Stewartry Locality

Chosen:

Further Details Ceased To Exist:

You can now edit and update any information on the record. The red bars next to some fields denote mandatory fields – as on the old system, these need to be populated in order to save a record.

Once you have made any changes you want to, click on the 'Save' button at the top of the screen (highlighted above) to return to the view organisation screen.

Associating a location

It's the same process to associate any object with a record. To add a location, for example, hover over the 'Locations' link to see existing locations.

Locations

Action	Ref	Primary Location	Street	Area/Town	City/County	Postcode	Phone Number
Edit Del	L-41958	✓	Chapellon Cottage Haugh of Urr		Castle Douglas	DG7 3ET	

Organisation Type: Voluntary Organisation

Phone: 01556 660058

Publish to Local Directory: ☐

Basic Profiling Data

Registered Charity Status: ☐

Registered Charity Number:

Legal Status: Not applicable - e.g. statutory, private company

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:

Then simply click on 'New location' to open up the edit screen for a new location.

The screenshot displays the 'New Location' edit screen in the MILO CRM. The page is titled 'Location Edit' and features a 'New Location' header. The form is divided into two main sections: 'Information' and 'System Information'. The 'Information' section includes fields for Organisation (New Start CIC Care Cor), Primary Location (checked), Home Address (checked), Street (123 Fake Street), Area/Town (Cumbernauld), City/Country, Postcode (G77 1EG), Phone Number (0141 545 2659), and Fax Number. The 'System Information' section includes a Legacy Ref field. The form also has a 'Required Information' indicator. The left sidebar shows 'Recent Items' with a list of recent records, including 'New Start CIC Care Connections', 'Jack Abbott', 'Gavin Bell', 'Pet Fostering Service Scotland (Callander)', 'YQ01658', 'New org 1', 'L-42156', 'Dundee', and 'New org - Media Volunteer Programme'. The footer of the page contains copyright information: 'Copyright © 2000-2015 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance'.

Complete the details you want for this location and click on the 'Save' button.

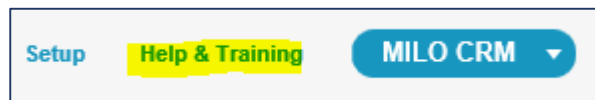
You will now see the new location, which is associated with the organisation.

Try clicking on the name of the organisation under 'Recent Items' to go back in to the record and check that the number of locations has increased by 1.

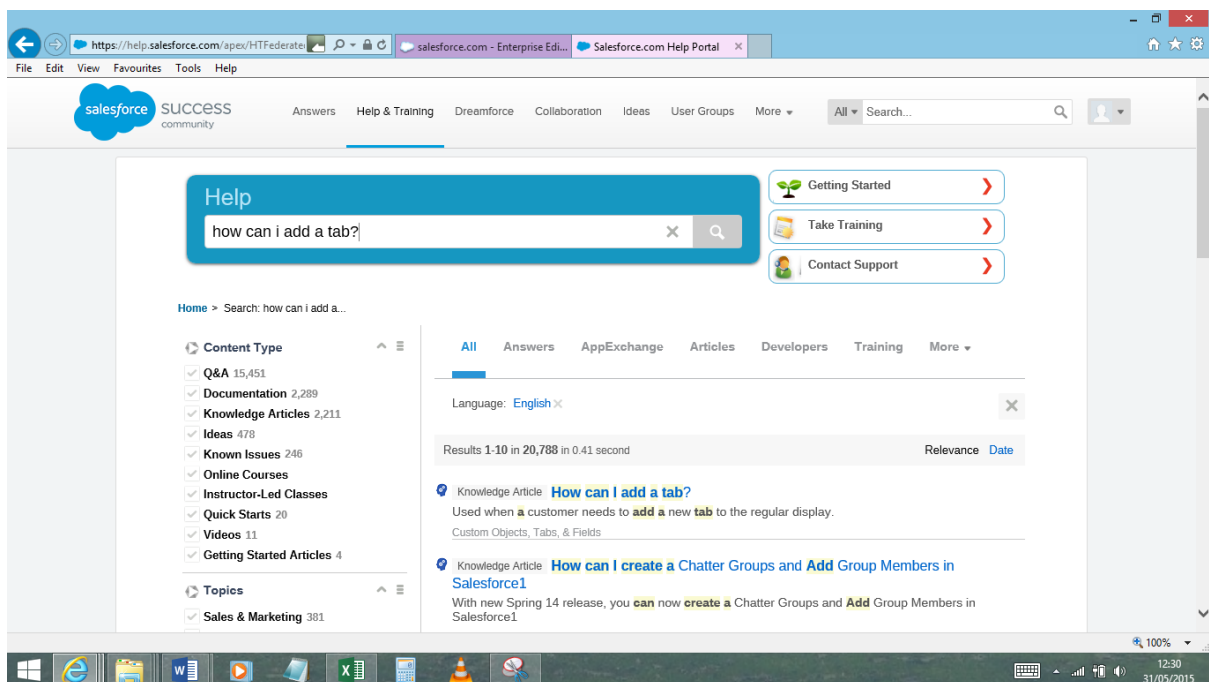
Salesforce help and training

Salesforce provides an excellent online help and training directory. While the custom Milo functionality is covered in these training modules, Salesforce has a wealth of other features that could complement your work. If you are interested in exploring Salesforce in more detail.

Click on the Help & Training link at the top right of every screen...



...to go to the Salesforce online training and help hub. You can take online training and access support from the worldwide Salesforce community.



You can usually find the answer to any question about Salesforce by typing your question into the Help search field.

Remember, for Milo-specific questions (e.g. “how do I create a new interaction with an organisation?”), it’s best to refer to the training documentation or contact the Milo team on milosupport@scvo.org.uk – but for questions about Salesforce itself, the online help and training is a fantastic resource.

Summary

In the **Quick Start Guide**, we have covered:

- Logging into the system
- The Home screen, and important features like Create New and Recent Items
- How to access Organisations, selecting a view, and opening a record
- Editing an organisation record and associating a location
- How to access Salesforce online help and training

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