



Milo update – June 2015

Dear colleagues

I'm pleased to say that the migration from Milo 1 is complete and the new Salesforce system went live on schedule this Monday. All of the data entered to the following entities before 12 noon on Friday 22 May should be available in the system:

- **Organisations**
- **Contacts**
- **Volunteer Registrations**
- **Volunteer Opportunities**
- **Membership records**

We've now set up the requested users for all TSIs who have returned their licence allocation list.

Milo users and licences

We have received licence request forms back from 26 of the 32 TSIs, and have set up all users in those areas. Milo leads have been activated for the other 6 TSIs. As soon as the remaining 6 TSIs return their forms, we will set them up right away.

A number of TSIs have indicated that they will need to purchase additional licences beyond the 'free' allocation. We'll be in touch with those TSIs later on today to get final numbers so that we can make a bulk order of additional licences from Salesforce. Additional licences currently cost £36+VAT per year at the non-profit rate.

Training modules

The initial training modules are available to download on the [training page](#), along with a short video introduction to the new system. The initial six documents and the Quick Start Guide are intended to cover the main aspects of day-to-day use (Organisations, Opportunities, Volunteer Registrations, Interactions, etc.) – we'll be adding more modules on Reporting, using Chatter etc. soon. Additional online help and training about the platform as a whole is available in the [Salesforce Community](#).

Early issues and fixes

As you can imagine, the migration to a new platform is a hugely complex task and occasional teething issues are to be expected. We have implemented fixes for several issues so far and are resolving them according to priority. Over and above small tweaks to fields, we've also dealt with:

Volunteer contacts change

To prevent other users from seeing the address details of volunteers, all personal data on volunteers is now held within the volunteer registration object. All users should now enter volunteers' personal addresses, phone numbers and emails directly into the volunteer registration, as opposed to the contact record. The system now prevents users from saving a volunteer registration when the contact address fields are completed.

Historical deleted organisations

You may have noticed some organisation records deleted from the old system have reappeared. These came across during migration and will be bulk-deleted from the new system tomorrow. You don't need to do anything other than ignore these 'ghost' records for the moment!

Neighbourhoods and interaction categories

Local neighbourhoods and new interaction category fields have been configured for all TSIs who have submitted their requirements. If you need to add to or amend these, please log a call with [Milo support](#). A new Core Services Outcomes (SG) field is available in interactions to allow you to tag each case to one or more SG outcomes.

Annual Profiling Data

The long-awaited **Annual Profiling Data** object is now available. This allows TSIs to capture data on their local sector's financial, staffing and volunteering stats on an annual basis for the first time.

Next steps

- Our contract extension with Sopra and Pulsant expires on **June 30th** - the original Milo system will be available up until this date. After June 30th, you will **no longer be able to access Milo 1**
- **Volunteer matching system** – we'll be creating an interface to allow volunteers to be matched with opportunities in a more usable way than on the old system
- **iFrames** – current iFrames are supported until the end of this month (still displaying data from Milo 1), but a new and improved version fed from Milo 2 will be available soon
- **Volunteer Scotland** feed – Volunteer Scotland is currently testing the new feed from Milo 2 and expect this to be live at the end of this week
- **Get Involved / ALISS** feed – Get Involved and ALISS are currently still displaying data from Milo 1 but work is underway to pull the feed from the new system. In the interim, we're updating any changes reported to both systems.

The next meeting of the MUG will be held on **Thursday 18th June** in Glasgow. If you would like to have any points or suggestions discussed at the meeting, please forward them to angus.lindsay@vaslan.org.uk

If you'd like to discuss anything about the new Milo in greater detail, please get in touch with. As always, you can drop an email to milosupport@scvo.org.uk for any Milo issues with the current system.

All the best

Gavin