



2015 Training Module 01

Getting Started

Version: May 15

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Introduction

This module will allow you to access and start working on the new Milo system on Salesforce.

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.

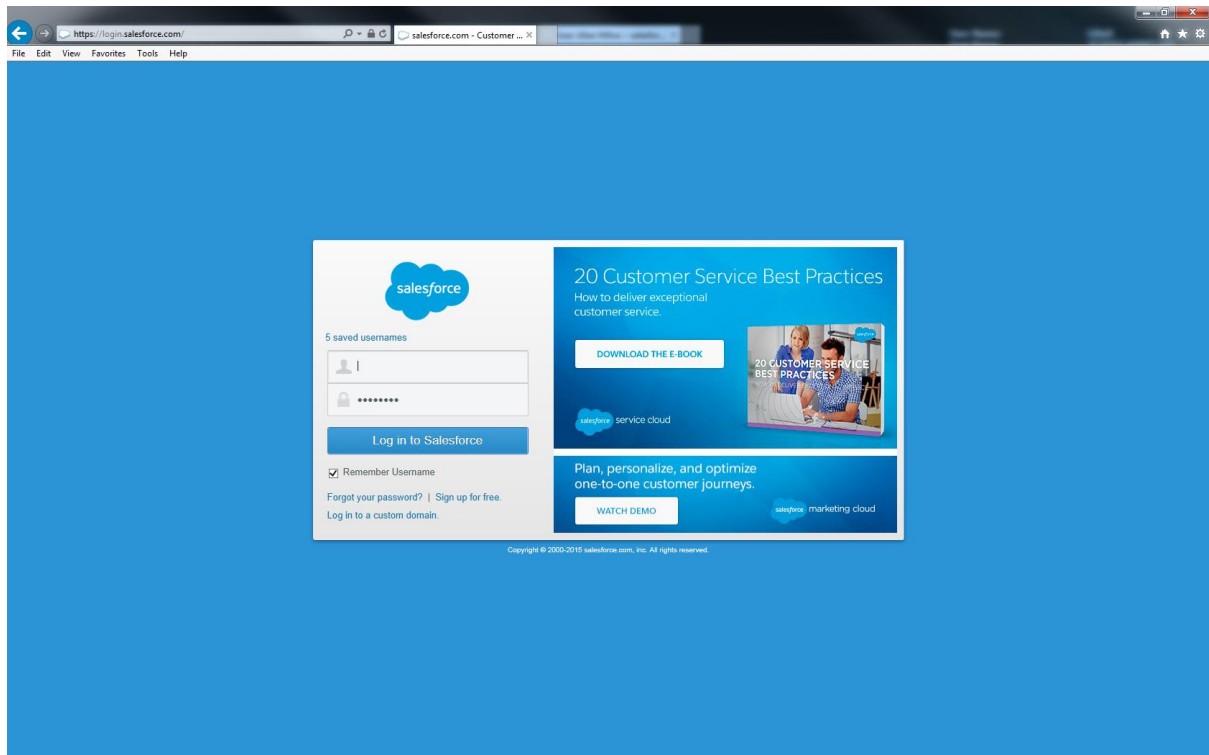
If you just want to get the basics, module 00 – **Quick Start Guide**, will enable you to access the system and start exploring. If you would like more step by step guidance, just start working through the rest of the modules.

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.

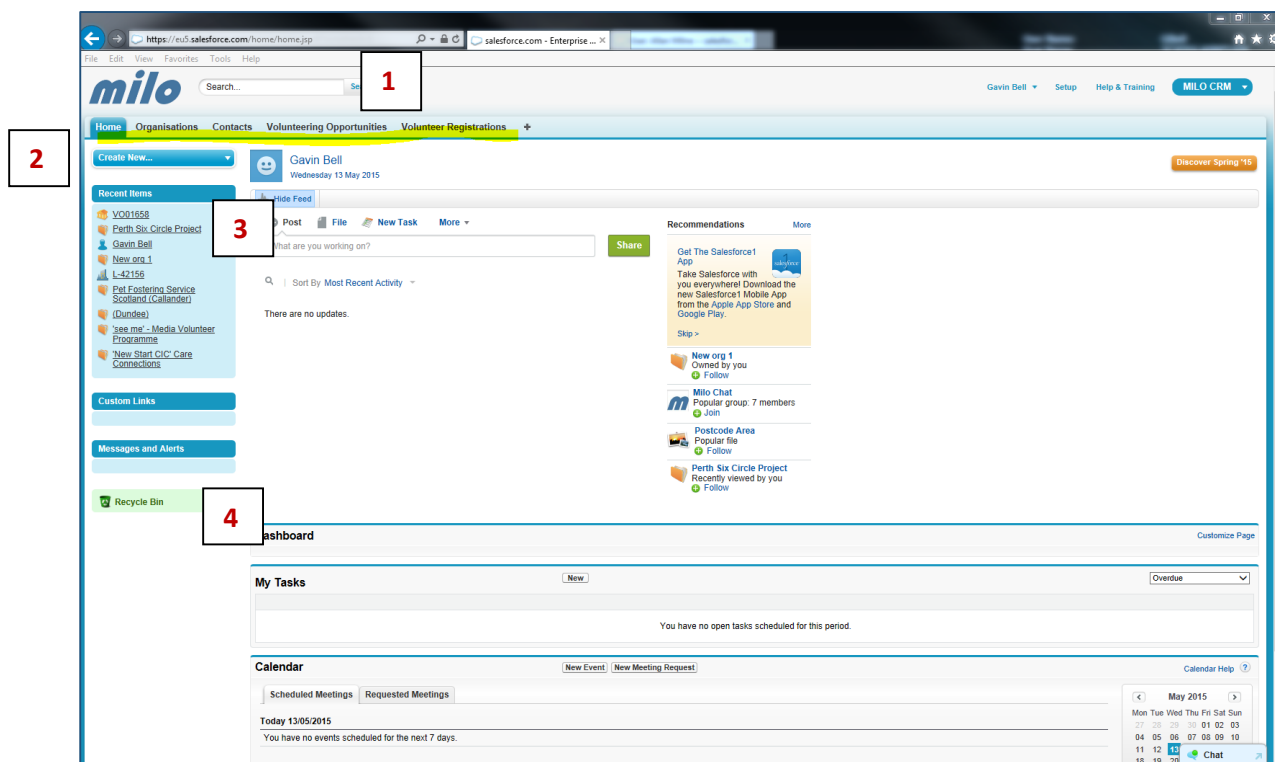
To access Milo, go to <https://login.salesforce.com/> and enter your details.



First steps and features

The home screen

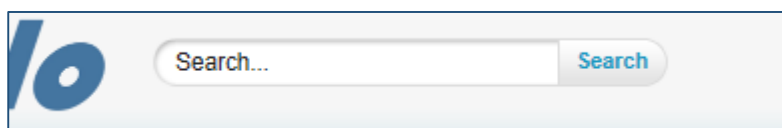
On login, you will be taken to your home screen – this is where you can see an overview of recent activity, live tasks and events, and any dashboards you have set up. You will see that along the top left of the screen there are several tabs relating to different Milo entities (highlighted below):



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



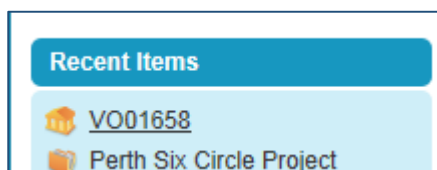
One of the key differences in the new system is that there is now a global system-wide search. The search field is a bit like Googling within Milo – enter any organisation or contact name to find matching results and associations. If you want to use partial words, remember to add an asterisk [*] as a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

2. Create new



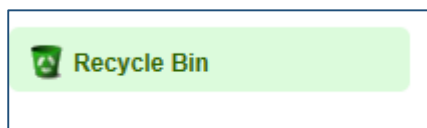
Create new allows you to create a new organisation, contact, opportunity, event or task without going anywhere else in the system (though of course, you should always make sure a record for a new contact etc. doesn't exist yet!).

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.

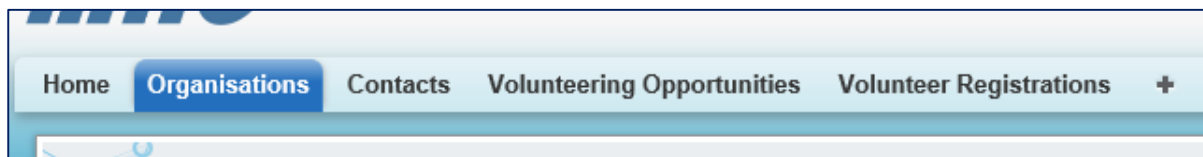
4. Recycle bin



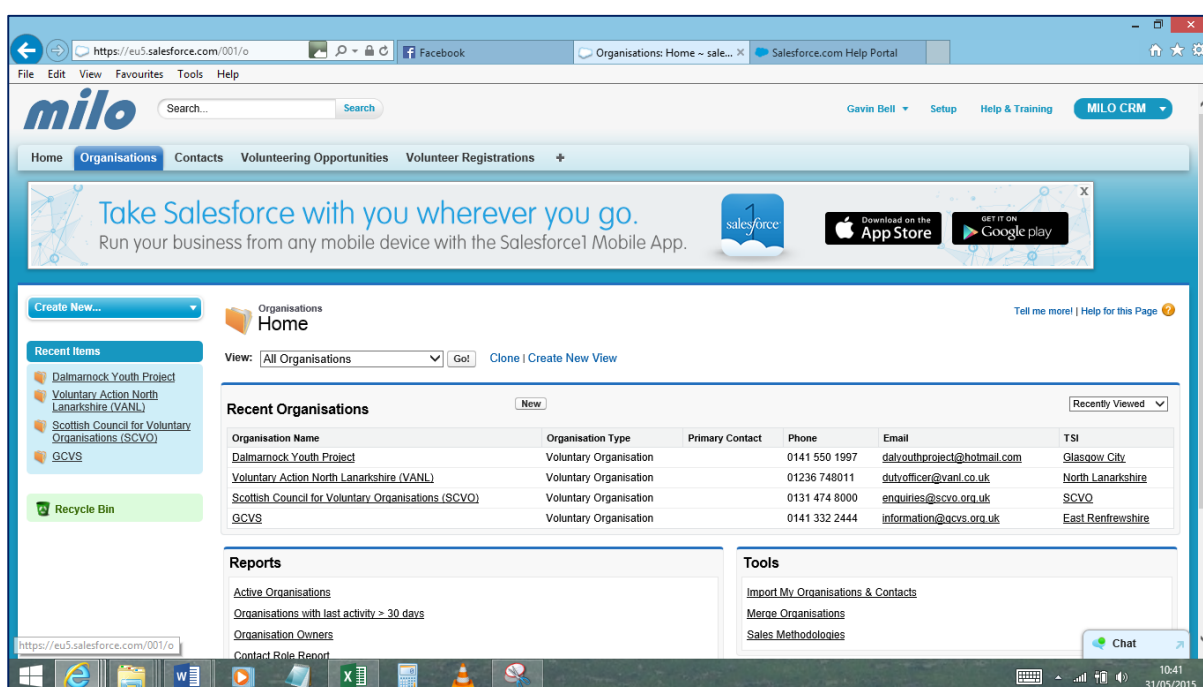
Lastly, if you accidentally delete a record, fear not – there's now a recycle bin so you can view and restore recently-deleted items if necessary.

Milo objects

You should recognise the standard Milo objects along the bar at the top of the screen from the old Milo system. You can choose which objects you want to appear on this bar – we'll look at this at the end of this module.



By clicking into each of these tabs, you will go to the home screen for each object. For example, if you click on Organisations, you will see a screen like this:



Don't worry if no organisations are showing first time. The home screen defaults to a view of the most recent records you accessed (and there won't be any if this is your first login). As you start to use the system, it will remember the most recent records and show them to you when you click into the home screen of an object.

Although viewing recent organisations is often a very quick way of getting to the record you want, it is possible to set up different **views** to bring up the records you work with most often.

Views

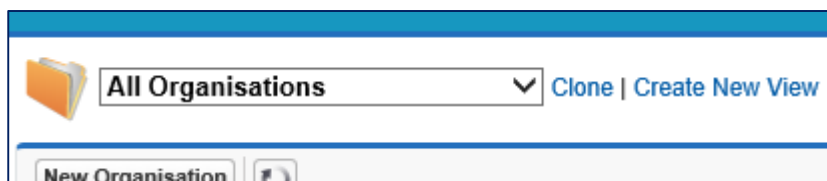
Salesforce allows users to create their own customised views of records on the system, using the fields within each object to sort and filter for exactly the information you want. For example, you might want to:

- View a list of all organisations with an ML1 postcode
- View a list of individual members of the TSI
- View a list of all Volunteers between the ages of 18-25

A Salesforce view is like a very simple report which allows you to select the records you want to see. It's very simple to create a view, and once you have saved a new view, you can use it every time you login.

The view selector

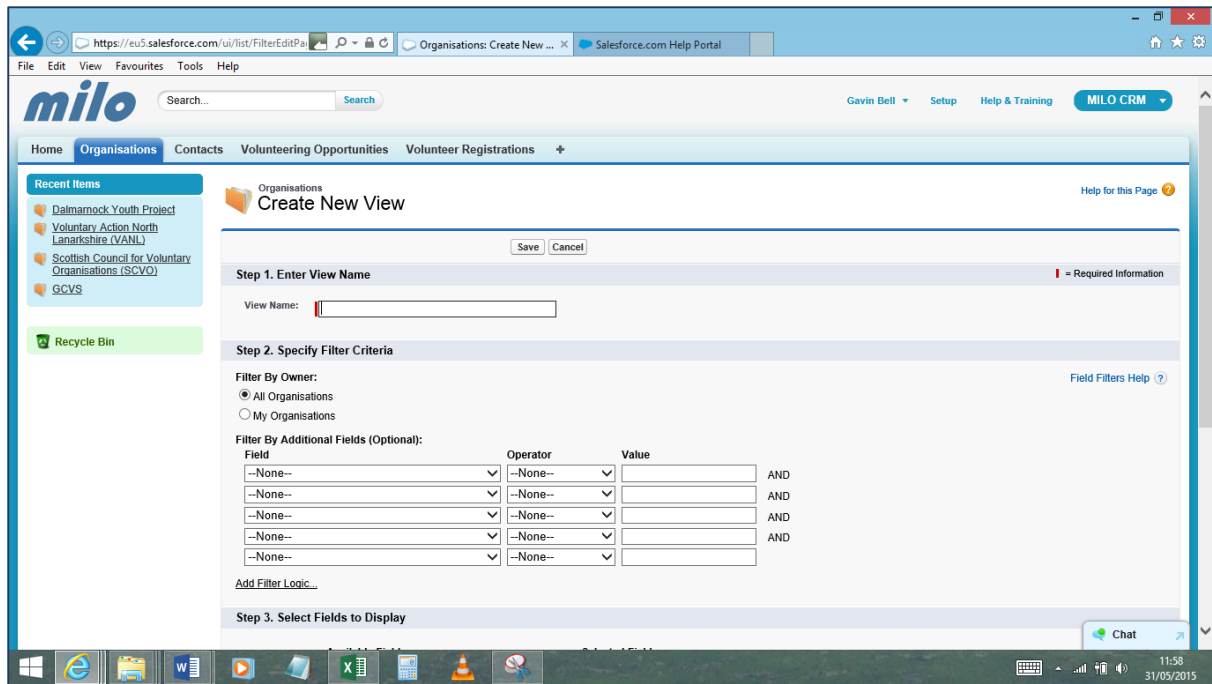
Click on the Organisations tab to see the home screen as above. Just below where it says 'Organisations Home', you'll see a dropdown menu called 'View', which defaults to 'All Organisations':



If you click on 'Go!' you will see that this really does return all organisations – all 40,000 of them. This isn't particularly useful unless the organisation you are looking for is right at the start of the alphabet, so let's try creating a more specific view.

Creating a view

Click on the Create New View link on the right hand side of the view selector. This takes you to the page that will allow you to select which criteria you want to use for your view.



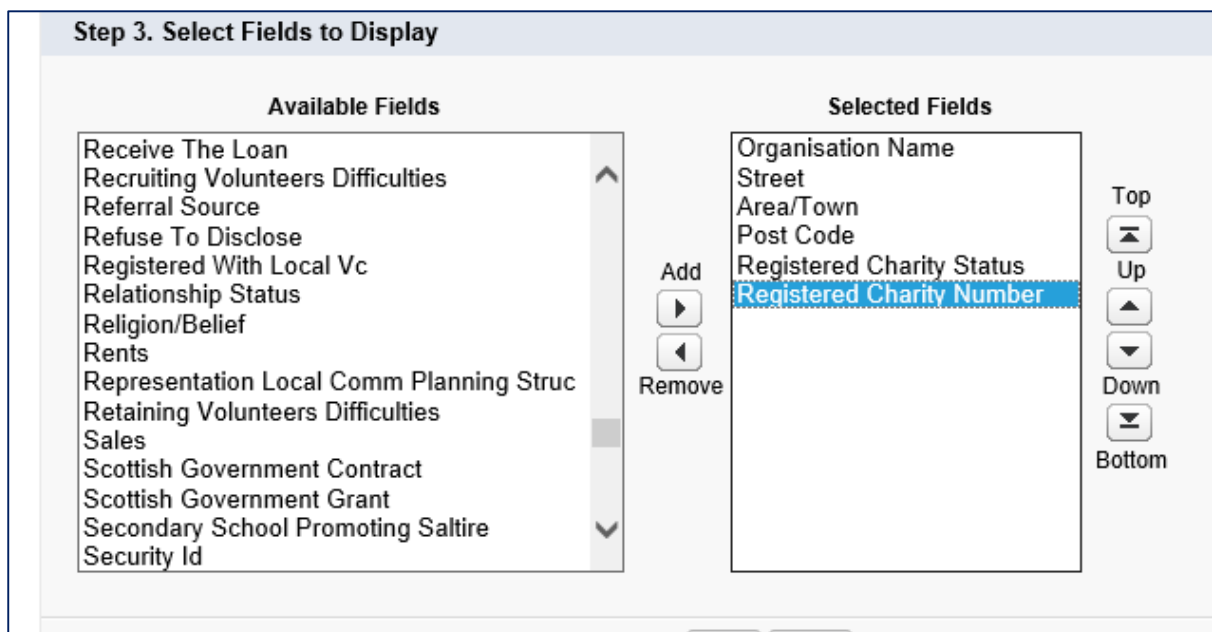
First, give it a name. '[Your name] test view' will do fine.

n.b.: note the red bar next to the 'View Name' field. This means this field is mandatory – you have to complete this one in order to save.

Leave the Filter by Owner radio button set at 'All Organisations' for now. Ignore Filter by Additional Fields as well – we'll come back to this.

Now, select the fields from the Organisation object you wish to display in your view. Simply scroll through all of the available fields in the box on the left hand side and add the ones you're interested in to the box on the right hand side.

For this example, we've picked the organisation name and address details, plus charity status and number.



Finally go back to Specify Filter Criteria in Step 2. For this example, we want to view all organisations which are registered charities.

Filter By Owner:
☒ All Organisations
☐ My Organisations

Filter By Additional Fields (Optional):

Field	Operator	Value
Registered Charity Status	equals	
--None--	--None--	
--None--	--None--	
--None--	--None--	
--None--	--None--	

[Add Filter Logic...](#)

Step 3. Select Fields to Display

Available Fields	Selected Fields
Receive The Loan	Organisation Name
Recruiting Volunteers Difficulties	Street
Referral Source	Area/Town
Refuse To Disclose	Post Code
Registered With Local Vc	Registered Charity
Relationship Status	Registered Charity
Religion/Belief	
Rents	

Lookup
 Select the picklist values to add below.
☒ True
☐ False

To do this, select 'Registered Charity Status' from the Field dropdown, and 'equals' from the Operator dropdown. Then click on the magnifying glass next to 'Value' to see which options are available. In this case, it's a simple True or False. Select True and click on insert selected.

You now have a very simple filter for your view: 'Registered charity status equals true'

Filter By Additional Fields (Optional):

Field	Operator	Value
Registered Charity Status	equals	True
--None--	--None--	

This will still return thousand of records, so to limit the results a bit more, select 'Organisation Name' from the Field dropdown, 'starts with' from operator. This time, simply type in the word 'Airdrie':

Filter By Additional Fields (Optional):

Field	Operator	Value
Registered Charity Status	equals	True
Organisation Name	starts with	airdrie
--None--	--None--	

If you want to, you can add other filters, for example all charities within a particular postcode area, or all charities with names beginning with the letter Z. But for now we'll keep it simple.

Now click on the Save button at the bottom of the screen and that's it – you have created a view!

The screenshot shows the Milo CRM interface in a web browser. The URL is <https://eu5.salesforce.com/0017fcf=00824000>. The page title is "Organisations - salesforce...". The navigation bar includes "Home", "Organisations", "Contacts", "Volunteering Opportunities", and "Volunteer Registrations". The "Organisations" tab is active, showing a "Gavin test view" of a list of organisations. The list is filtered to show only organisations starting with "Airdrie". The list has columns for "Action", "Organisation Name", "Street", "Area/Town", "Post Code", "Registered Charity Status", and "Registered Charity Number". There are 20 rows of data, all starting with "Airdrie".

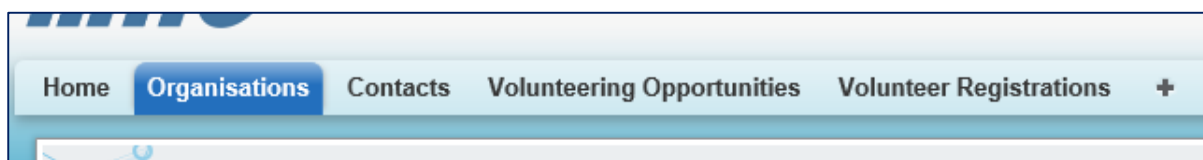
Action	Organisation Name	Street	Area/Town	Post Code	Registered Charity Status	Registered Charity Number
Edit Del	Airdrie & Coatbridge Islami...				✓	SC030226
Edit Del	Airdrie Academy School E...				✓	SC014750
Edit Del	Airdrie And Coatbridge Isl...				✓	SC030226
Edit Del	Airdrie Arts Guild Ltd				✓	SC041206
Edit Del	Airdrie Astronomical Asso...				✓	SC041014
Edit Del	Airdrie Baptist Church				✓	SC018264
Edit Del	Airdrie Broomknoll Parish...				✓	SC016464
Edit Del	Airdrie Citizens Advice Bur...				✓	SC012238
Edit Del	Airdrie Clarkston Parish C...				✓	SC011239
Edit Del	Airdrie Coatbridge & Distri...				✓	SC011651
Edit Del	Airdrie Community Trust				✓	SC043999
Edit Del	Airdrie Craft Group				✓	SC030165
Edit Del	Airdrie Division Guides				✓	SC031892
Edit Del	Airdrie Flowerhill Parish C...				✓	SC014555
Edit Del	Airdrie Foodbank				✓	SC015831
Edit Del	Airdrie Helping Hands				✓	SC028908
Edit Del	Airdrie Jackson Parish Ch...				✓	SC004083

Instead of thousands of results, you can now view the 20 organisations on the database which are registered charities and have names beginning with the word 'Airdrie'.

Adding an object tab to your display

Each user will want to access different parts of the system on a day-to-day basis, so it's possible to change the object tabs on your local display.

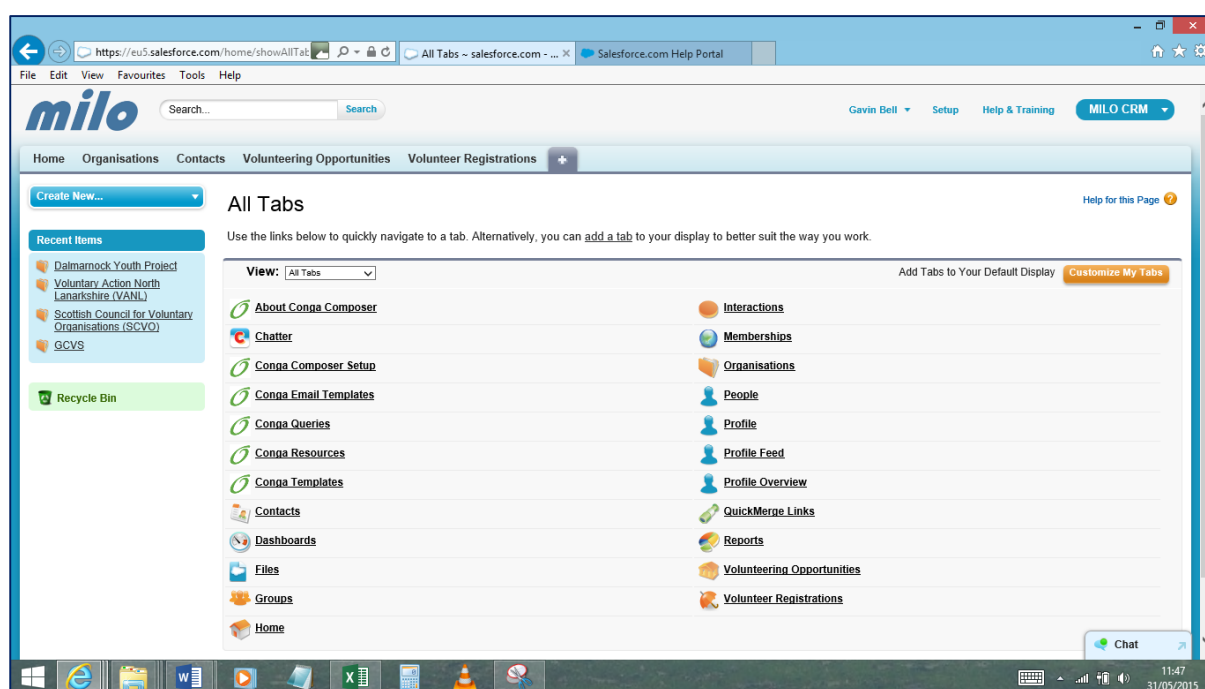
As in the old Milo system, the default display shows the main Milo objects: Organisations, Contacts, Volunteering Opportunities and Volunteer Registrations (Interactions is no longer displayed by default as it is now possible to access these from individual organisation records).



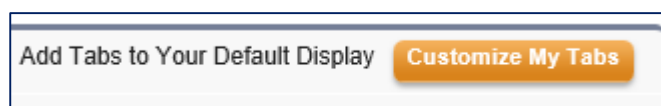
If you don't work with volunteers, you probably don't need to have the Volunteering Opportunities or Volunteer Registrations tabs on your display (especially if your permissions do not allow you to view volunteer records).

Similarly, if you work with reports a lot, you may want to have Reports available as one of the main tabs.

To manage your tabs, click on the + symbol to the right of the tab bar (next to Volunteer Registrations in the image above). This takes you to the All Tabs screen, where you can navigate to any of the objects and functions you have permission to view.



To add one of these tabs to your user display, click on the orange 'Customise My Tabs' button at the right of the screen:

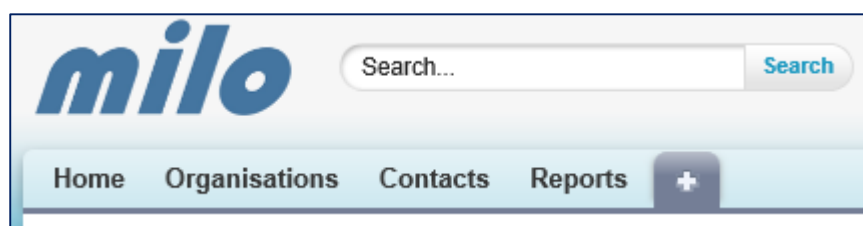


This will allow you to select the tabs you want to see on your own display. Don't worry, this won't change anyone else's display within your TSI, only yours.

You can choose any available tab in the box on the left hand side and add it to the box on the right hand side to determine what tabs appear on the top bar of your display. Similarly, you can remove tabs on your existing display.

The screenshot shows a window titled "Customize My Tabs" with the instruction "Choose the tabs that will display in each of your apps." Below this, a dropdown menu labeled "Custom App:" is set to "MILO CRM". The interface is divided into two main sections: "Available Tabs" on the left and "Selected Tabs" on the right. The "Available Tabs" list includes Groups, Interactions, Memberships, People, Profile, Profile Feed, Profile Overview, QuickMerge Links, Chatter, Volunteering Opportunities, and Volunteer Registrations. The "Selected Tabs" list includes Home (default), Organisations, Contacts, and Reports. Between the two lists are "Add" and "Remove" buttons. To the right of the "Selected Tabs" list are "Up" and "Down" buttons. At the bottom right are "Save" and "Cancel" buttons.

In this example, we've added Reports and removed Volunteering Opportunities and Volunteer Registrations. Click Save to view your amended display.

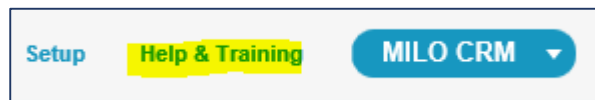


If you change your mind, you can go back and add or remove tabs at any time.

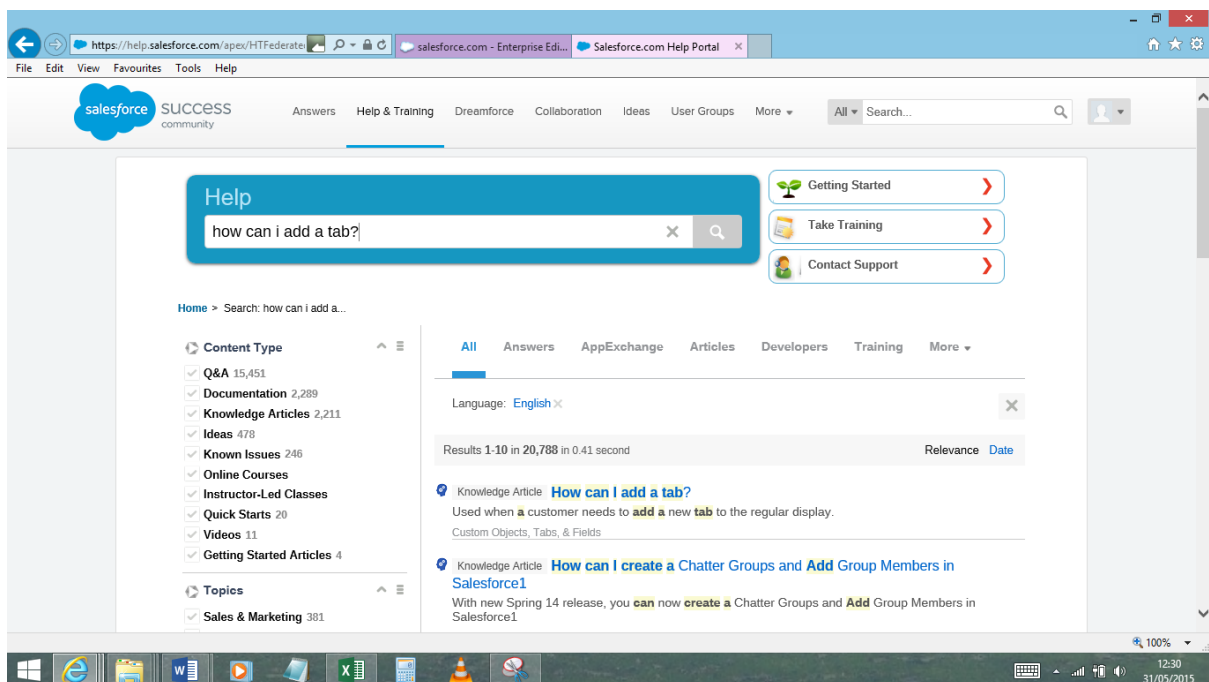
Salesforce help and training

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 this **Getting Started** module, we have covered:

- Logging into the system
- The Home screen, and important features like Create New and Recent Items
- Milo objects
- Using and creating views
- Customising the available object tabs on your display
- How to access Salesforce online help and training

This gives you the basic skills you need to navigate around Milo and make use of some key Salesforce functions. The next few modules will focus on using the standard Milo objects like Organisations, Volunteer Registrations and Volunteer Opportunities.

Remember – if you have any problems or get stuck, you can contact the Milo team at milosupport@scvo.org.uk