INSTALLING AND CONFIGURING VOLUNTEERS FOR SALESFORCE

Much of this documentation is pulled directly from the app creator's own fantastic documentation. I have edited, reorganized, and added screenshots and notes for clarity. You can download their documentation if you prefer. Groundwire also has an online knowledge base base that you search through and they monitor the Non-profit Salesforce users Google Group if you need additional help. Finally, if all else fails, Groundwire welcomes emails from users seeking help.

Contents

Overview

About this Document

This documentation is aimed at users who have never installed Volunteers for Salesforce, and who have little experience with Salesforce. It is an adapation of the original Groundwire documentation, with some formatting tweaks, added screenshots, and some instructions related to upgrades omitted. There are also link within the document. You can click on any red text and it will bring you to the page that the text refers to.

At over 90 pages, this documentation may look daunting, but please don't panic. A common issue with documentation is that it is poorly designed and lacks the necessary depth to be useful. This documentation is meant to be clean and thorough. Thus, the page count is padded by whitespace, narrow margins, lists, and screen shots. It is not truly 90 pages worth of documentation.

The files used to create this documentation are available for download on github.

About Volunteers for Salesforce

Volunteers for Salesforce is a Salesforce package that can be installed into any Salesforce instance, and used to manage all aspects of your organization's volunteer management needs.

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

- Volunteer Job – used to specify a job or position that needs to be filled, as well as the skills needed for the job.

- Volunteer Shift – used to specify dates, times, and number of volunteers needed for a specific Volunteer Job.
- 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 job shift the volunteer filled. Also used to tentatively schedule volunteers for specific job shifts and positions.

Volunteer information about Contacts is stored in several custom fields which include Availability, Skills, Status, and a summary of the Hours worked. Leads also have some additional custom fields for tracking volunteer information.

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

Part I

Installation Instructions

Requirements Before Installing

In order to successfully install the package and to have the tests run without any errors, you must ensure that the login used to install the package has permissions to create Campaigns (they must have Marketing User checked in their user account), as well as permissions to install packages.

If you have 6 or more rollup summary fields on the Campaign object, Volunteers for Salesforce will fail to install and you must have Salesforce increase your rollup summary field limit before installing.

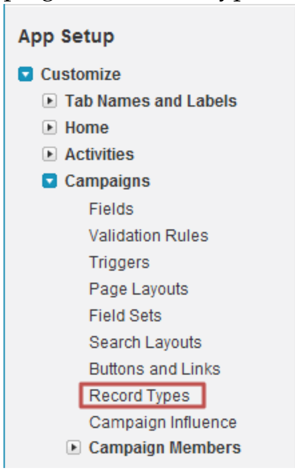
Creating a default Campaign record type (optional)

Since the Volunteers package will create a new Campaign Record Type, you should first create a default Campaign Record Type, if you don't have one.

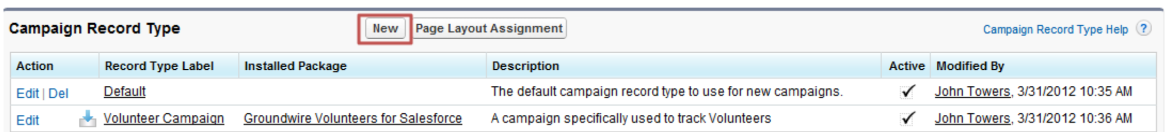
Note: This step is optional. It is included so that you may preserve the way Salesforce handles Campaigns by default (which may or may not be useful to your organization). It is safe to skip this step, as it can be done later if you decide you wish to choose between the default Salesforce Campaign and the Volunteers campaign.

1. Click on your username in the top right and go down to Setup.

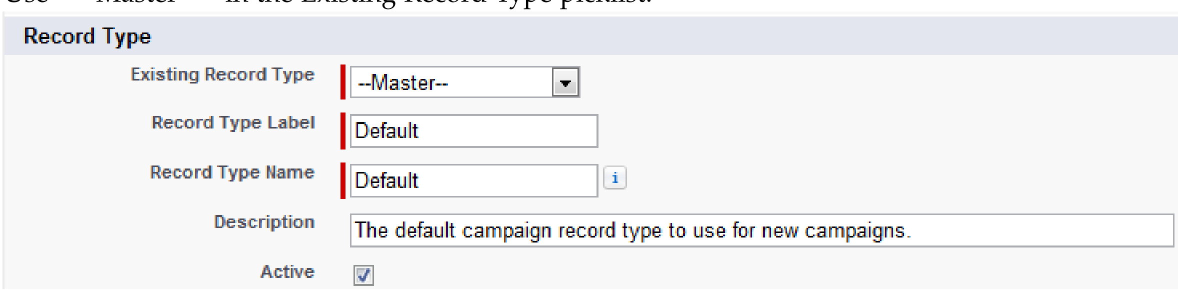
2. In the navigation on the left go to App Setup > Customize > Campaigns > Record Types.



3. Click on the "New" button.



4. Use "—Master—" in the Existing Record Type picklist.



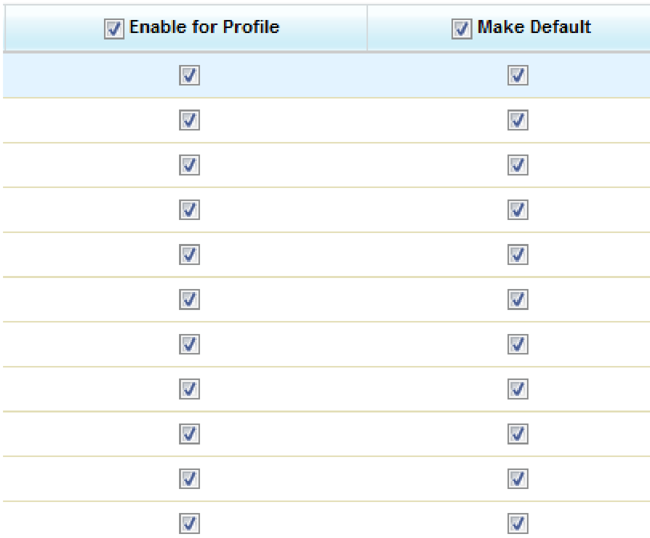
5. Fill in Record Type Label with anything you want ("Default" is a good choice).

6. Use the Record Type Name that Salesforce fills in, when you fill out the Record Type Label.

7. For description, put in "The default campaign record type to use for new campaigns."

8. Check "Active".

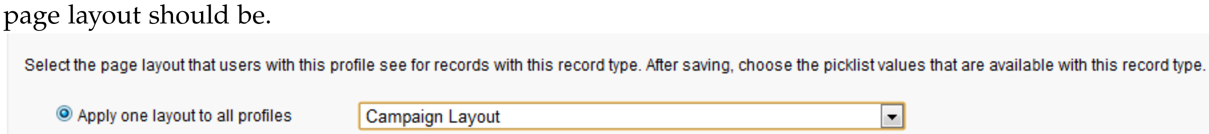
9. Check the "Enable For Profile" checkbox in the header, so that all profiles can use this new record type.



10. Check the “Make Default” checkbox in the header, so that all profiles will default to using this new record type.

11. Click “Next”.

12. On the Assign Page Layouts page, choose Apply one layout to all profiles, and select “Campaign layout”, or whatever your default page layout should be.



13. Click “Save”.

Installation Steps

1. Go to http://bitly.com/volunteersSF to visit the Volunteers for Salesforce app on the App Exchange.

   (a) Click "Get It Now".

   (b) Provide the information that the dialogue asks for [1]and click "Continue".

   (c) Log in when Salesforce prompts you to.

[1] If you have created a sandbox to test apps in, you can choose to install Volunteers to it. Note, however, that any changes you make in the Sandbox must be reapplied when you install the app in your live deployment.

2. Review Package Components, Set Security Levels & Install.

   (a) Before installing you will have the option to review all the components of Volunteers for Salesforce. The package name, version, description will also be noted. Simply click "Continue" to proceed.

   (b) Volunteers for Salesforce requires access of your salesforce.com objects through the API. Please review and approve the required access by clicking on "Next".

   (c) Choose security levels to determine which user profiles can access Volunteers for Salesforce. We recommend specifying "Grant Access to all Users." Click "Next" to continue.

   (d) Just click the "Install" button and Volunteers for Salesforce will be added into your salesforce.com account[2].

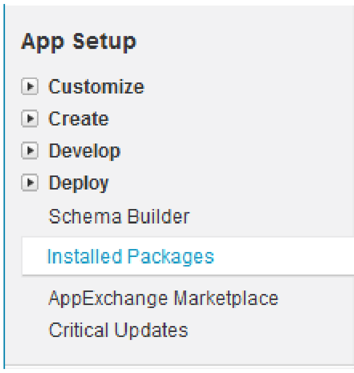
   (e) You will receive an email from Salesforce when the package has successfully been installed.

[2] INSERT WARNING ABOUT APEX FAILURES

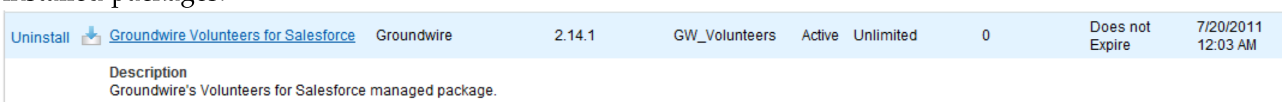
3. Completing the Installation with "Deploy"[3].

   (a) Go to Setup > App Setup > View Installed Packages

[3] This is a critical step that frequently is overlooked, because you must do it after you have received email from Salesforce that the installation was successful.



(b) Click on "Groundwire Volunteers for Salesforce" in the list of installed packages.



(c) The Package Details page will show you a listing of all of the package components. Click on "Deploy".

(d) The Deploy Package page now displays a listing of the custom objects, custom report types, and workflow rules. To proceed, simply click "Deploy".

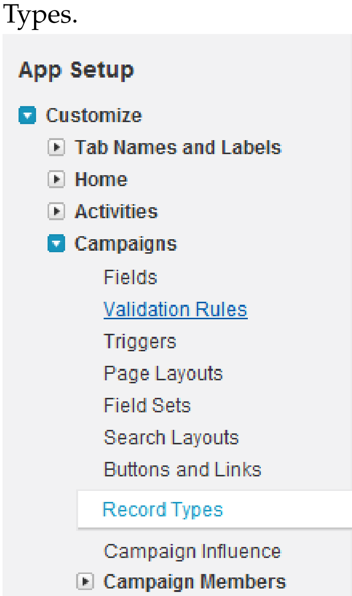
The application is now installed and ready to be configured.

Requirements after installation

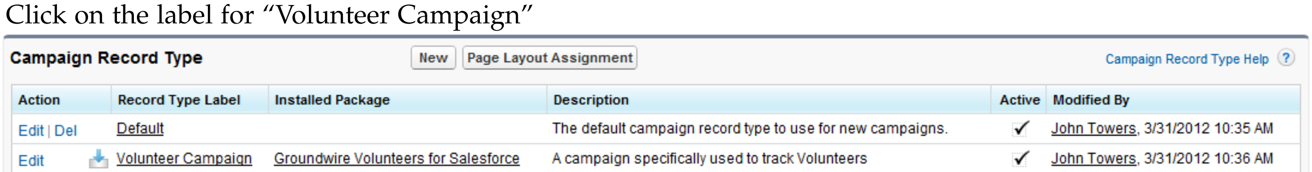
Campaign Record Types

Since Volunteers for Salesforce adds a new Campaign Record Type, you need to make sure that any custom picklist fields you have created, have their appropriate choices and default value specified for the new record type.

1. Go to Setup > App Setup > Customize > Campaigns > Record Types.



2. Click on the label for “Volunteer Campaign”



3. In the Picklists Available for Editing section, click on the “Edit”

link for each picklist, and makes sure you have appropriate Values and Defaults.

Picklists Available for Editing — Picklists Available for Editing Help

Action	Field	Modified Date
Edit	Status	7/20/2011 12:02 AM
Edit	Type	7/20/2011 12:02 AM

(a) The Status picklist describes the status of the campaigns.

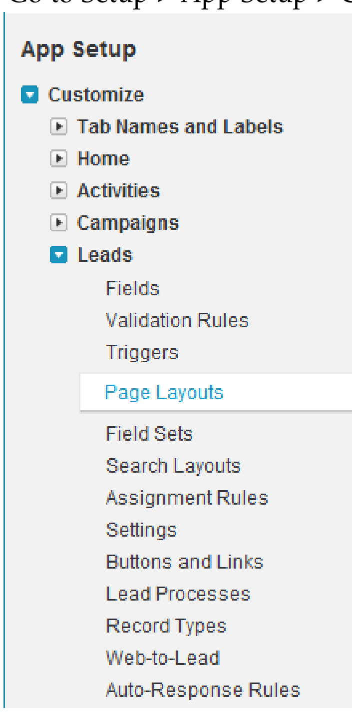
(b) The Type picklist allows users to pick the type of campaign during a campaign's creation (e.g., Direct Mail or Benefit Concert).

Updating Contact and Lead Page Layouts

Volunteers for Salesforce adds several custom fields to Leads and Contacts. The following instructions will step you through the process of modifying your page layouts to display and organize these fields[4].

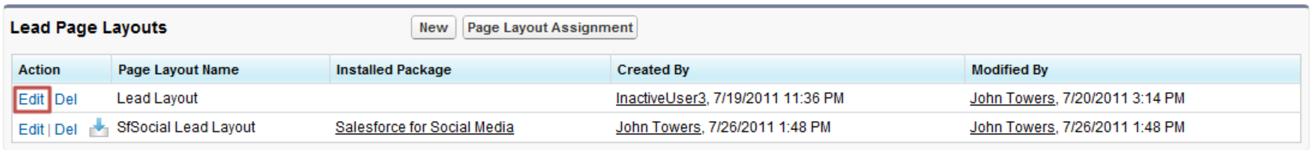
[4] The following set of instructions requires permissions to edit page layouts.

1. Go to Setup > App Setup > Customize > Leads > Page Layouts.

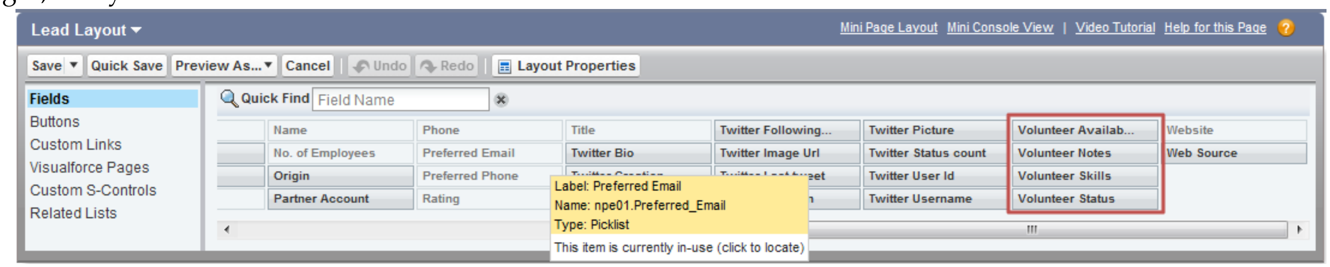


2. Click on the "Edit" link for the normal Lead Layout[5].

[5] If would like different views for different roles (e.g., Volunteer Coordinators see volunteer information first on acontact page), you can instead click the "New" button to create a layout that can be then assigned to different roles in your Salesforce deployment.

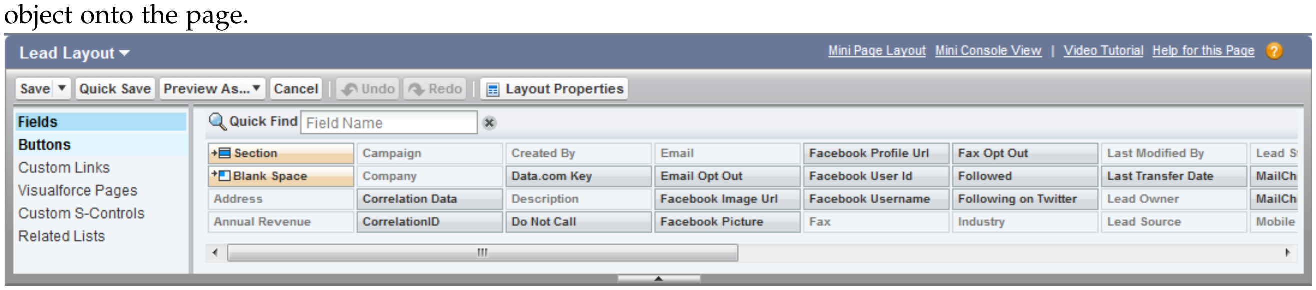


3. In the set of fields available to add to your layout, scroll to the right, and you will see there are four Volunteer related fields.

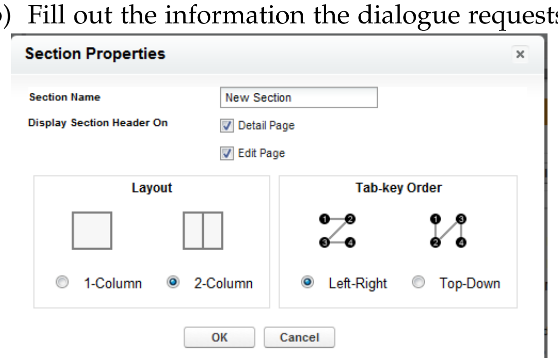


4. Drag and drop the fields highlighted in the screenshot above to the place on the page that you want.. We suggest you create a Volunteer Information section first. If you wish to create a volunteer section:

   (a) scroll back to the left of the fields section and drag the Section object onto the page.



   (b) Fill out the information the dialogue requests and click "Ok".

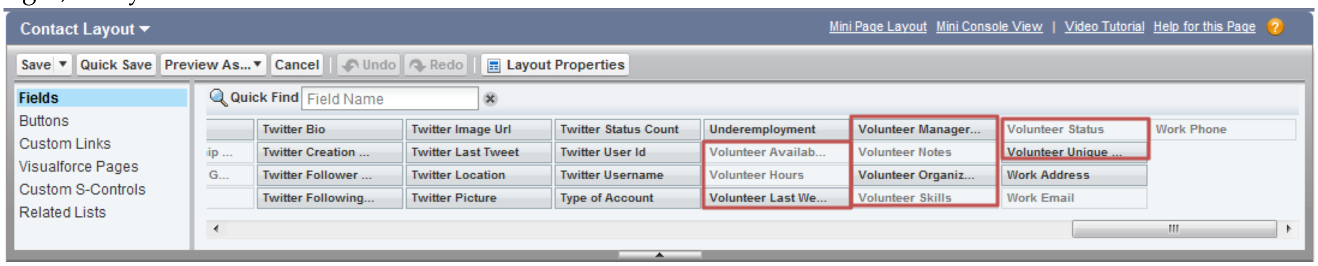


5. Click on the "Save" button.

To edit the layout for the Contacts page, do the following[6]:

[6] Many of the following steps look exactly like the steps for editing the Leads layout and thus are not accompanied by screenshots.

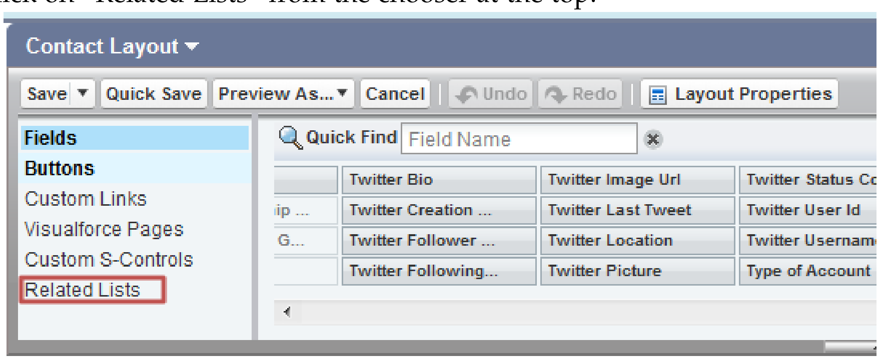
1. Go to Setup > App Setup > Customize > Contacts > Page Layouts.
2. Click on the "Edit" link for the normal Contact Layout.
3. In the set of fields available to add to your layout, scroll to the right, and you will see there are ten Volunteer related fields.



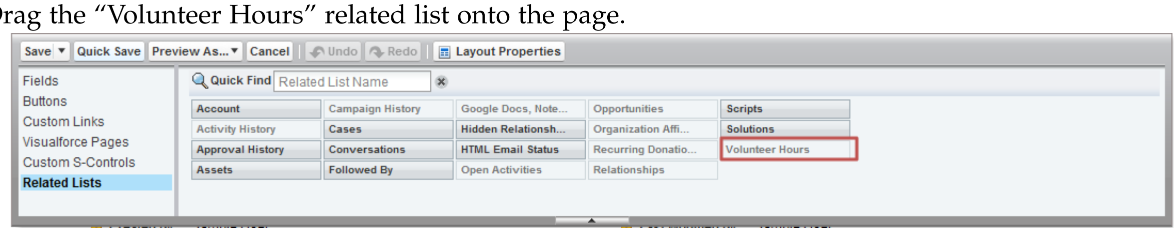
4. Drag/Drop these into your page layout where you prefer. We suggest you create a Volunteer Information section first. (Creating a section in the Contacts layout editor uses the same method as the Leads editor).

Some of the fields in the screenshot above are greyed out because they are already present in the current layout. In a fresh install, none of these fields will be grey.

5. Click on "Related Lists" from the chooser at the top.



6. Drag the "Volunteer Hours" related list onto the page.



7. Click "Save".

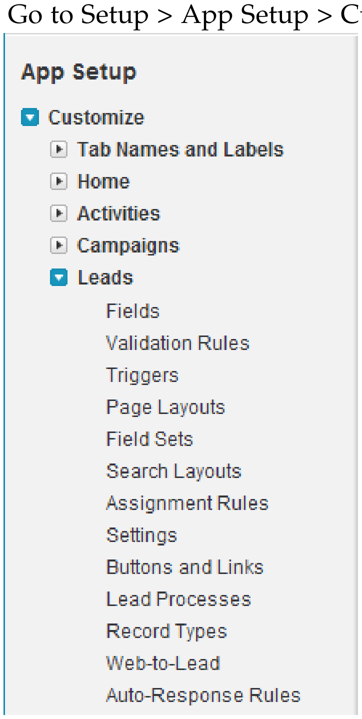
Updating Volunteer Campaign, Volunteer Job, and Volunteer Shift Page Layouts

Volunteers for Salesforce provides other custom buttons that allow users to Mass Email members of a Campaign, Job or Shift and to see a Shift Calendar for a Campaign and/or Job. For most installations, these features should be present by default. Since this documentation is aimed at first-time installations, instructions will not be included. Please refer to the original documentation if you are upgrading and need to enable these features.

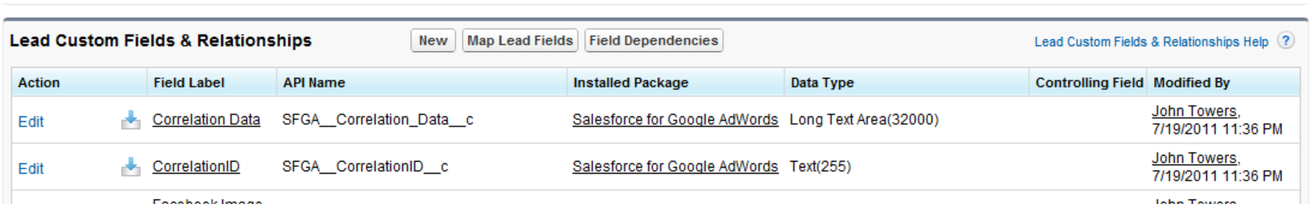
Volunteer Skills and Ability

The Groundwire Volunteers package is designed to be used in an on-going fashion. There are some field picklists that are used in Leads, Contacts, and Volunteer Jobs that you will want to modify initially or in the futuresidenoteModifying these picklists will not affect information already saved in Salesforce. Changing the values won't affect old volunteer information.. To edit these lists:

1. Go to Setup > App Setup > Customize > Leads > Fields



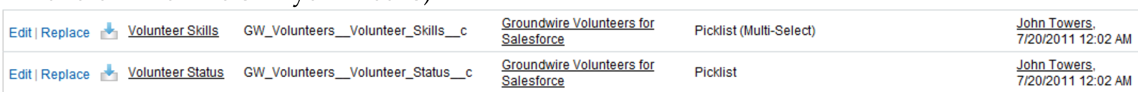
2. Scroll down to the "Custom Fields and Relationships" section.



Lead Custom Fields & Relationships — New | Map Lead Fields | Field Dependencies — Lead Custom Fields & Relationships Help

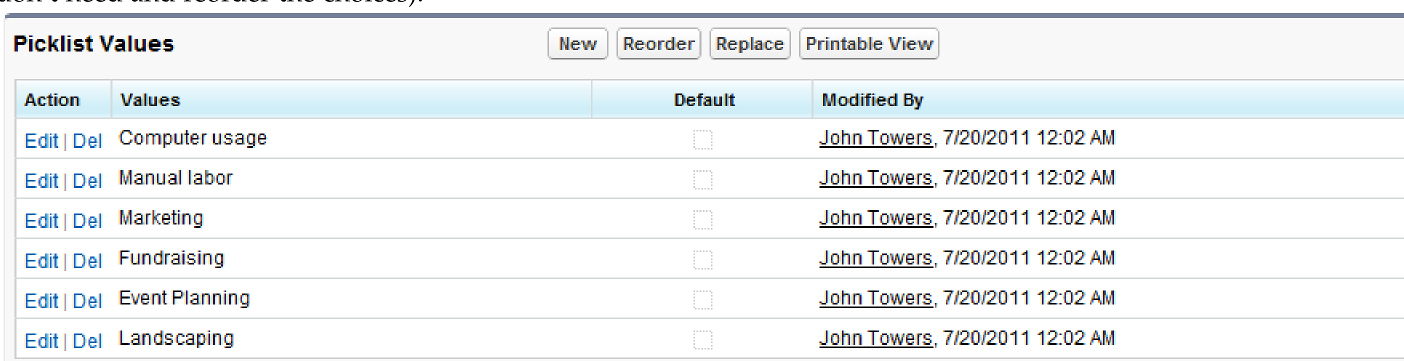
Action	Field Label	API Name	Installed Package	Data Type	Controlling Field	Modified By
Edit	Correlation Data	SFGA__Correlation_Data__c	Salesforce for Google AdWords	Long Text Area(32000)		John Towers, 7/19/2011 11:36 PM
Edit	CorrelationID	SFGA__CorrelationID__c	Salesforce for Google AdWords	Text(255)		John Towers, 7/19/2011 11:36 PM

3. Click on the label for either "Volunteer Skills" or "Volunteer Availability" (it doesn't matter which you do first, as you will likely have to edit both to suit your needs).



Edit | Replace	Volunteer Skills	GW_Volunteers__Volunteer_Skills__c	Groundwire Volunteers for Salesforce	Picklist (Multi-Select)	John Towers, 7/20/2011 12:02 AM
Edit | Replace	Volunteer Status	GW_Volunteers__Volunteer_Status__c	Groundwire Volunteers for Salesforce	Picklist	John Towers, 7/20/2011 12:02 AM

4. From the "Picklist Values" section, click on the "New" button to add any new choices you want (you can also delete choices you don't need and reorder the choices).



Picklist Values — New | Reorder | Replace | Printable View

Action	Values	Default	Modified By
Edit | Del	Computer usage		John Towers, 7/20/2011 12:02 AM
Edit | Del	Manual labor		John Towers, 7/20/2011 12:02 AM
Edit | Del	Marketing		John Towers, 7/20/2011 12:02 AM
Edit | Del	Fundraising		John Towers, 7/20/2011 12:02 AM
Edit | Del	Event Planning		John Towers, 7/20/2011 12:02 AM
Edit | Del	Landscaping		John Towers, 7/20/2011 12:02 AM

5. Repeat these steps in Setup > App Setup > Customize > Contacts > Fields. Make sure that you make the choices the same for each list in both Contacts and Leads.

6. Repeat these steps again in Setup > App Setup > Create Objects for the "Volunteer Job" object.

Custom Settings

The Groundwire Volunteers for Salesforce package includes a set of custom settings named Volunteers Settings. It includes various fields that you can modify to customize the Volunteers package to work with your Salesforce instance. Here are the settings and their default values:

1. Signup Matches Existing Contacts - Should the page VolunteersSignup try to match the person to an existing Contact (by First Name, Last Name, Email). Default is unchecked. Note that this setting is only used by VolunteersSignup, and not any additional pages.

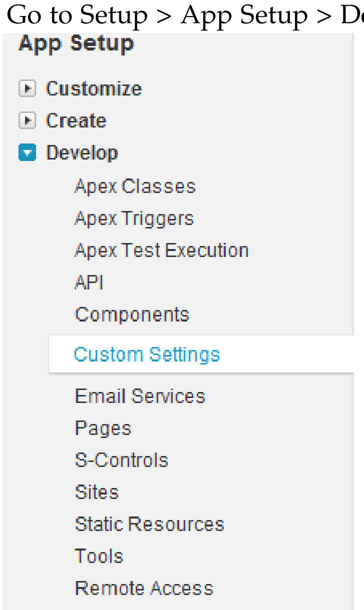
2. Signup Creates Contacts If No Match - Should the page VolunteersSignup create new Contact records, if no existing contact is found (or Signup Matches Existing Contacts is unchecked). If this setting is unchecked, it will create Leads when no matches found. Default is unchecked. Note that this setting is only used by VolunteersSignup, and not any additional pages [7].

3. Signup Bucket Account On Create - The name of the account to use when creating new Contacts from the pages VolunteersSignup, VolunteersSignupFS, VolunteersJobListing, and VolunteersJobListingFS. If you are using the Non Profit Start Pack One-to-One model, leave this setting blank. If you are using the bucket model, set this to the name of the account; usually 'Individual'. Default is blank.

[7] Leads in Volunteers for Salesforce are much the same as they are for businesses: they represent potential relationships. You can use them to separate prospective volunteers from confirmed volunteers and can track conversions of prospective volunteers to confirmed volunteers. This requires more configuration and upkeep (described in a later section). If you wish to treat all potential volunteers as Contacts, check this box and skip the "Lead to Contact Field Mappings" section. Note that the "Volunteer Status" field for Contacts has a "Prospective" option, meaning you can still separate Confirmed from Prospective volunteers using only Contacts.

To modify these settings do the following:

1. Go to Setup > App Setup > Develop > Custom Settings



2. Click on the "Manage" link for Volunteers Settings.

Action	Label ↑	Visibility	Settings Type	Namespace Prefix
Manage	Affiliations Settings	Public	Hierarchy	npe5
Manage	Contacts And Orgs Settings	Public	Hierarchy	npe01
Manage	Households Settings	Public	Hierarchy	npo02
Manage	Twitter Public Configuration	Public	Hierarchy	sf4twitter
Manage	Twitter Scheduler Interval	Public	List	sf4twitter
Manage	User Rollup Field Settings	Public	List	npo02
Manage	Volunteers Settings	Public	Hierarchy	GW_Volunteers

3. Click on “New” or “Edit” (whichever button is available).

4. Adjust the settings as you wish[8].

[8] You can specify anything for the Name field.

Lead to Contact Field Mappings

Skip this section if you checked the "Signup Creates Contacts If No Match" option above.

Volunteers for Salesforce includes a VisualForce page you can enable in Salesforce Sites, and integrate into your website. This page enables people to sign up to be a volunteer on your website. Instructions on how to do this are later in this document. If you use this functionality, you have the option having either Lead or Contact records created. If you use Leads, then you will want to specify the Lead Custom Field Mapping so that the volunteer fields on the Lead will be copied over to the Contact when the Lead is converted.

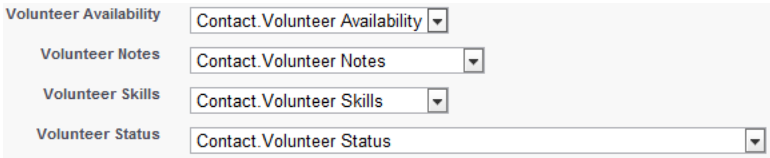
1. Go to Setup > App Setup > Customize > Leads > Fields

2. Scroll down to the “Lead Custom Fields & Relationships” section and click on the “Map Lead Fields” button.

Lead Custom Fields & Relationships New | Map Lead Fields | Field Dependencies — Lead Custom Fields & Relationships Help ?

Action	Field Label	API Name	Installed Package	Data Type	Controlling Field	Modified By
Edit	Correlation Data	SFGA__Correlation_Data__c	Salesforce for Google AdWords	Long Text Area(32000)		John Towers, 7/19/2011 11:36 PM

3. Specify that “Volunteer Availability”, “Volunteer Notes”, “Volunteer Skills” and “Volunteer Status” all map to their associated fields on the Contacts record.



4. Click “Save”.

Ensure Lead Volunteer Status Field Default Value

This step is only relevant to users upgrading Volunteers for Salesforce. Check the original documentation for instructions on how to check this field.

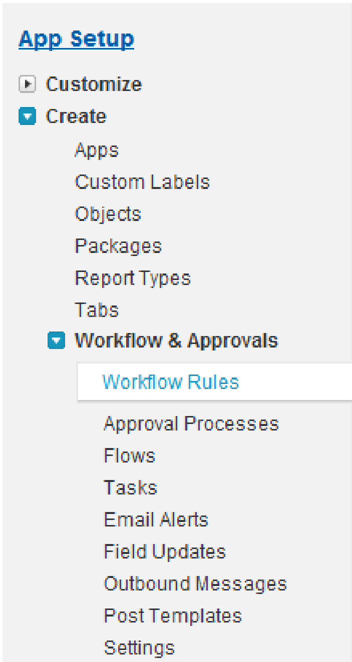
Ensure All Activities Allowed on Volunteer Jobs & Volunteer Shifts

This step is only relevant to users upgrading Volunteers for Salesforce. Check the original documentation for instructions on how to check this field.

Ensure Workflow for Volunteer Hours is Activated

Most of the Volunteer Reports use the Volunteer Hours End Date field to filter on. There is a workflow rule to set this End Date field if it isn’t filled out when you enter records. You need to ensure that this workflow rule is enabled after installation.

1. Go to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules.



2. Click on the letter "V" in navigation links to see just the Volunteers workflows.

Action	Rule Name	Description	Object	Active
Edit | Del | Deactivate	VNews	Sends people a sign up form for the volunteer newsletter	Contact	✓
Edit | Del | Activate	VNews		Campaign Member	
Edit | Deactivate	Volunteer Hours - Set End Date	If End Date is empty, set it to Start Date.	Volunteer Hours	✓
Edit | Activate	Volunteer Signup - Contact	When a contact is updated or created during a Volunteer Signup, thank them and notify the volunteer manager.	Contact	
Edit | Activate	Volunteer Signup - Lead	When a new lead is created from a volunteer signup, send a thank you and notify the volunteer manager	Lead	
Edit | Del | Activate	Volunteer Update	Request to update volunteer information if a volunteer goes for so long without signing up to volunteer.	Contact	

Click on the "Activate"[9] link for Volunteer Hours – Set End Date

[9] If the button says "Deactivate" instead of "Activate", the workflow is already activated. Do not click it again or it will deactivate the workflow.

Email Notifications and Email Templates

If you use the Volunteers Signup page or Volunteers Job Listing page on your website, several email notifications will be sent when a new volunteer signup occurs. There are two Workflow Rules which by default, are activated. These are Volunteer Signup – Contact and Volunteer Signup – Lead. If you want to turn these off, do the following:

1. Go to Setup > App Setup > Create Workflows & Approvals > Workflow Rules

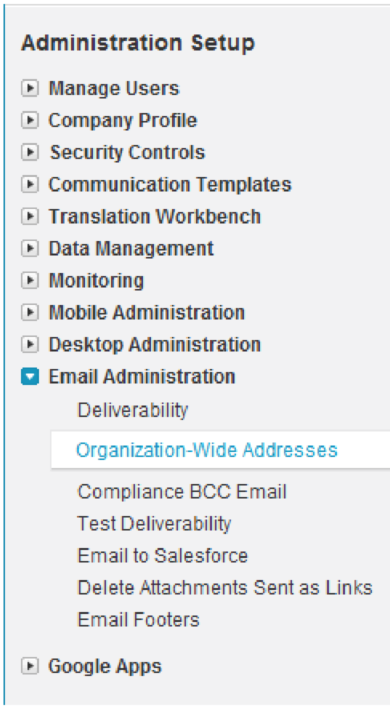
2. Scroll to the bottom to see the Volunteer workflows.

3. Click on "Deactivate" to turn them off.

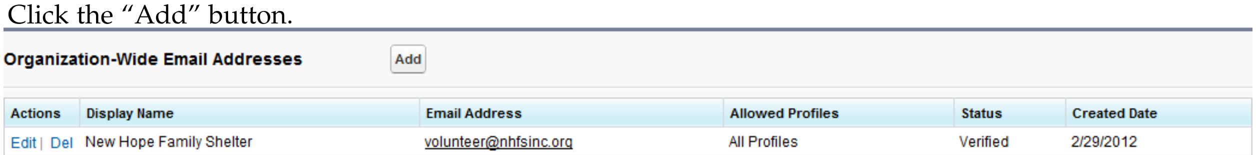
Both of these Workflow Rules[10] use several Email Alerts. The Volunteer Signup Thank You Email – Contact and Volunteer Signup Thank You Email – Lead both send their email to the volunteer with the From Email Address set to current user's email address. Due to these rules being run when the website creates the contact, the from address will look like "volunteers Site Guest User". You should modify these two Email Alerts to use one of your Organization-Wide Addresses. To create an Organization-Wide Address, do the following:

[10] If you are upgrading from a version before 1.14, there is an additional step that you must take to get the alerts to work. Check the original documentation for more information.

1. Go to Setup > Administration Setup > Email Administration > Organization-Wide Addresses.



2. Click the “Add” button.

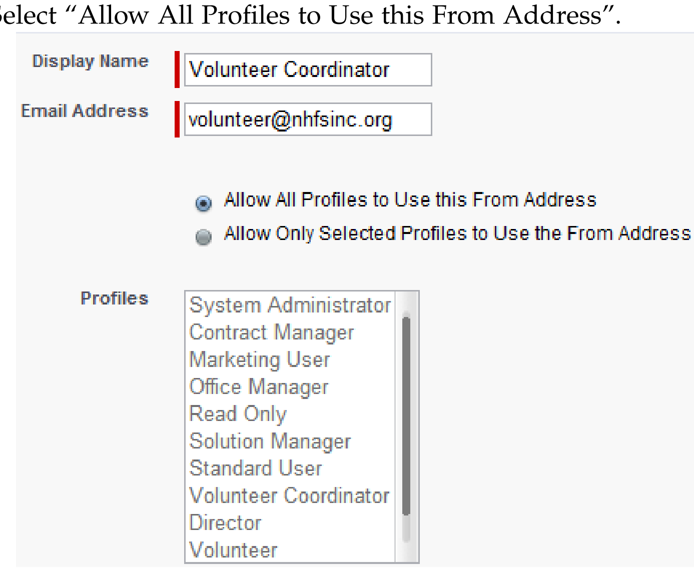


Organization-Wide Email Addresses Add

Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date
Edit | Del	New Hope Family Shelter	volunteer@nhfsinc.org	All Profiles	Verified	2/29/2012

3. Provide a display name and a valid email address[11].

4. Select “Allow All Profiles to Use this From Address”.

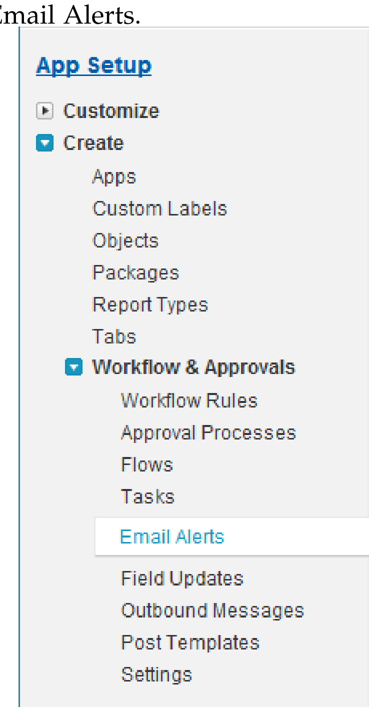


5. Click “Save”.

[11] You must have access to this email address, as Salesforce sends a confirmation email to make sure that you are the owner.

6. Check the email that you specified for the message from Salesforce and click the validation link to confirm that you own the account.

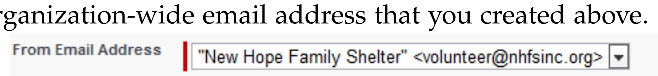
7. Go to Setup > App Setup > Create > Workflow & Approvals > Email Alerts.



8. Scroll down to the bottom of Email alerts to see the Volunteer related email alerts.

9. Click "Edit" for one of the "Volunteer Signup Thank You" alert[12]

10. Scroll down to the "From Email Address" field and choose the organization-wide email address that you created above.



11. If you are using both Leads and Contacts, remember to perform the steps above on both alerts.

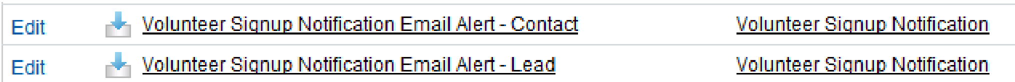
When contacts sign up online, the Volunteers for Salesforce app also sends email alerts to users to let them know that a Contact or Lead has signed up. By default, the email goes to the Lead or Contact's owner (usually whoever created the contact or lead). You can adjust the settings to send a notification to whichever user[13] you wish (e.g., a volunteer coordinator) by doing the following:

[12] If you are using the Lead method, you will eventually edit both Thank You alerts. If you are using Contacts only, you only have to edit "Volunteer Signup Thank You Email Alert - Contact".

[13] You must create the user before you begin these steps.

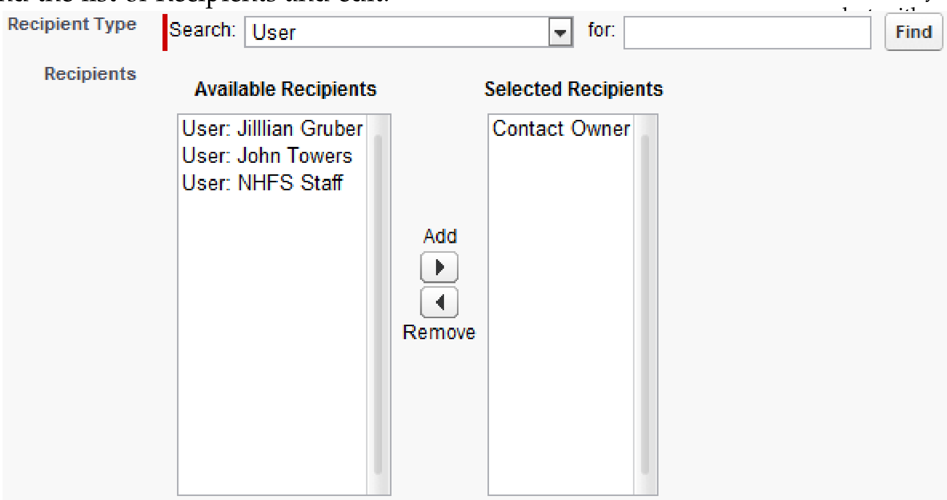
1. Go to Setup > App Setup > Create > Workflow & Approvals > Email Alerts

2. Scroll down to the bottom of the email alerts to see the volunteer related email alerts.



3. Click “edit” for a Volunteer Signup Notification Email Alert[14]

4. Find the list of Recipients and edit.



5. Click “Save”.

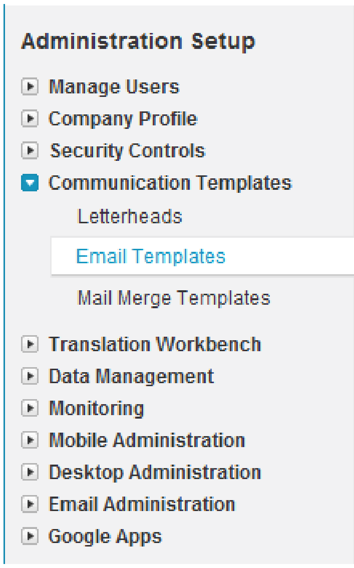
6. If you are using both Leads and Contacts, remember to change these settings for both notifications.

The various Volunteer Email Alerts all use Email Templates that you will want to customize for your organization. These email templates are also made available to the Mass Email Volunteers page. To edit these templates:

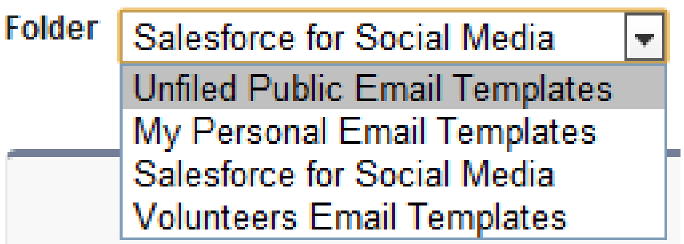
1. Go to Setup > Administration Setup > Communications Templates.

[14] Again, if you are using both Leads and Contacts, you will have to edit both of these alerts, but if you are only using Contacts, you can skip editing the Lead ... t consequence.

...nultiple volunteer coordi- ...ad of sending the alert to a ... you can send the alert to ...ı wish to this, change the ...pe from "User" to "Role" ...he appropriate role. Make ...ı create a role for volunteer ... and assigning users to that



2. Choose the "Volunteers Email Templates" folder to see the volunteer related templates.



3. Click on "Edit" for each of the templates that you wish to modify.

4. Edit the templates as you need.

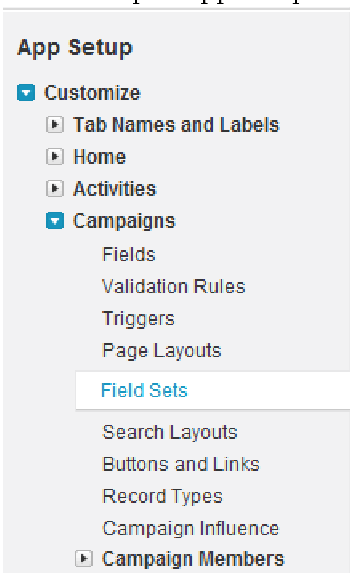
5. Click "Save".

Customizing the Volunteers Wizard

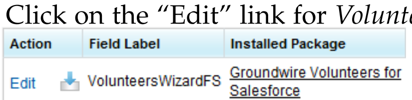
Volunteers for Salesforce now allows you to specify the Campaign fields to display on the Volunteers Wizard, using a Field Set. This allows you to include custom fields and standard fields that you want the user to fill out. Here are the steps to customize the Field Set:

The Volunteers Wizard comes with several relevant default fields. You will only need to edit this if you have custom Campaign fields that you wish to add to the Volunteers Wizard or if you don't plan on using all of the included fields.

1. Go to Setup > App Setup > Customize > Campaigns > Field Sets.



2. Click on the "Edit" link for *VolunteersWizardFS*.



Action	Field Label	Installed Package
Edit	VolunteersWizardFS	Groundwire Volunteers for Salesforce

3. To add fields to the field set, drag them from the top section into the "In the Field Set" box.

4. To remove fields from the Field Set, mouse over the field and click the "-" icon.

5. To reorder the fields, drag and drop them into place.

6. To make fields required, mouse over the field and click the wrench icon and select “Required” from the pop-up.
7. When finished, click “Save”.

Customizing Mass Edit Volunteer Hours

Volunteers for Salesforce now allows you to specify the Volunteer Hour fields to display on the Mass Edit Volunteer Hours page, using a Field Set. This allows you to include custom fields and standard fields that you want the user to fill out. Here are the steps to customize the Field Set:

1. Go to Setup > App > Create > Objects.
2. Click on the label for "Volunteer Hours".
3. Scroll down the page to the Field Sets section.
4. Click on the "Edit" link for MassEditVolunteerHours.
5. Follow the same steps in the last section to add, remove, and reconfigure the fields in the Mass Edit Volunteer Hours page.

Part II

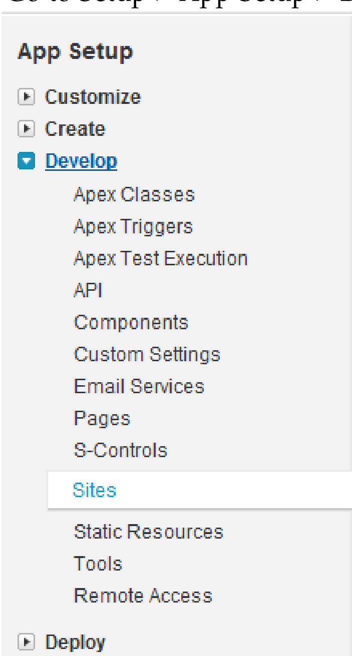
Configuring Volunteer Signup for Your Website

Enabling Salesforce Sites

If you have a website, and you would like to have a page on your site where people can sign up to express their interest in volunteering, Volunteers for Salesforce provides the page you need. Volunteers for Salesforce also provides a separate page that you can host on your website to display available volunteer jobs (and optionally shifts), and allow volunteers to signup for these specific job (and shifts).

In order to display Salesforce forms as web pages, you must enable Sites in your Salesforce database:

1. Go to Setup > App Setup > Develop > Sites



2. Specify the name you want to use for your domain[15].
3. Click on "Check Availability" to make sure the name you chose is not already in use.

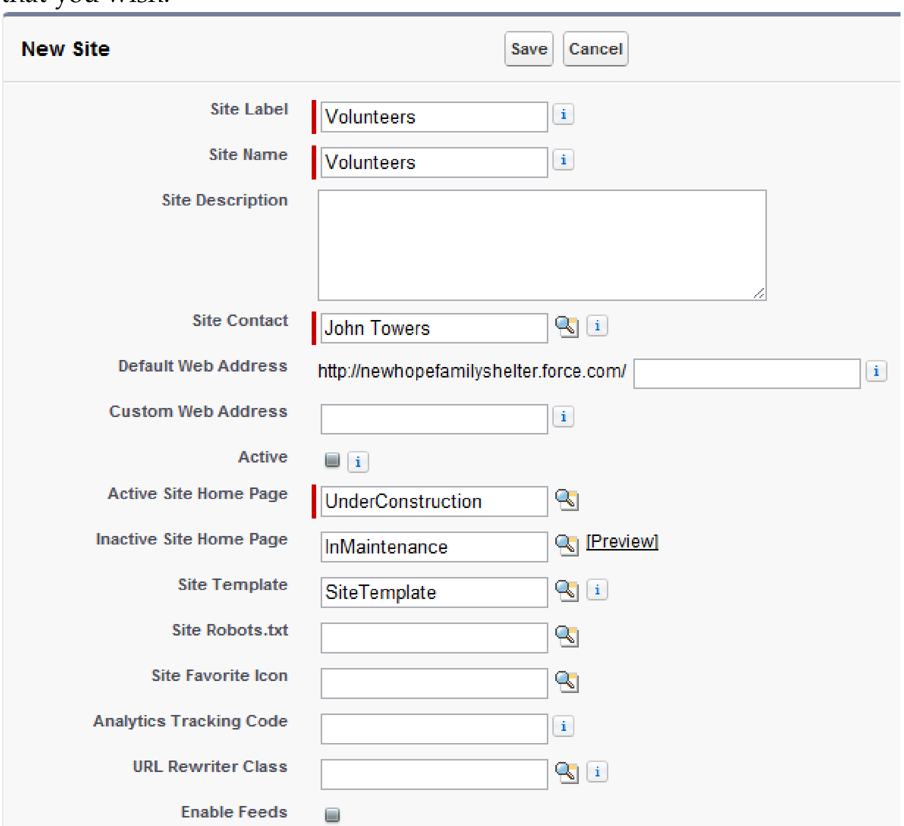
[15] Note that once set, you cannot modify this name. If you plan to redirect users to the volunteers page hosted on this site or you plan to use the site for other purposes, you should choose a name that is appropriate for your organization.

4. Read and check the "Sites Terms of Use."
5. Click "Register My Force.com Domain."

Creating a Site

Now that you have enabled Salesforce Sites, you will create an actual site to host the pages for Volunteers for Salesforce:

1. Go to Setup > App Setup > Develop > Sites.
2. Click on the "New" button.
3. On the edit page, fill in the required fields and any other fields that you wish:



   (a) Site Label: Can be anything but "Volunteers" is recommended for clarity.

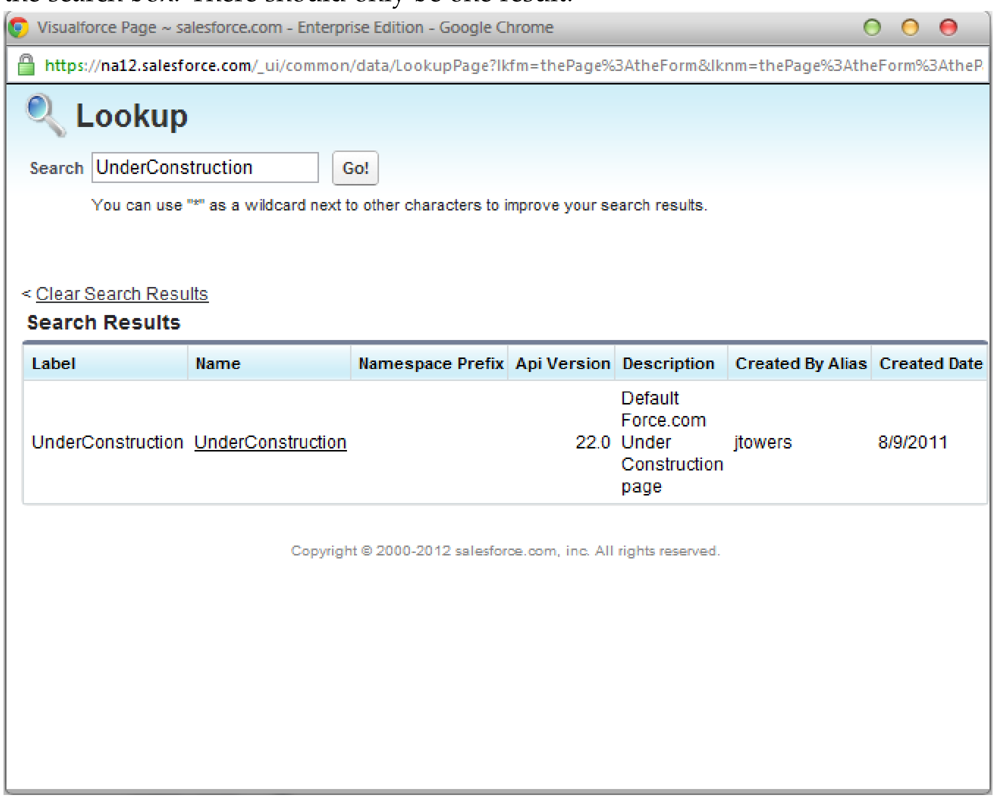
(b) Site Name: Can be anything but "Volunteers" is recommended for clarity.

(c) Site Contact: Choose the contact who will handle the technical issues for the site. Use the magnifying glass icon next to the field to search for the appropriate contact.

(d) Active Site Home Page: Use the default "UnderConstruction" page that Salesforce provides. To do this:

i. Click on the magnifying glass icon next to the field.

ii. In the window that pops up type "UnderConstruction" into the search box. There should only be one result.



iii. Click the result to insert the page into the field.

(e) Other fields can be ignored if you wish.

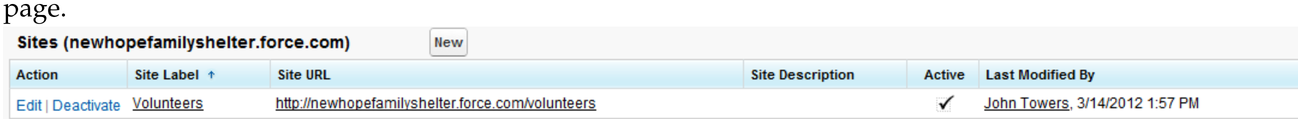
4. Click "Save".

Configuring Access

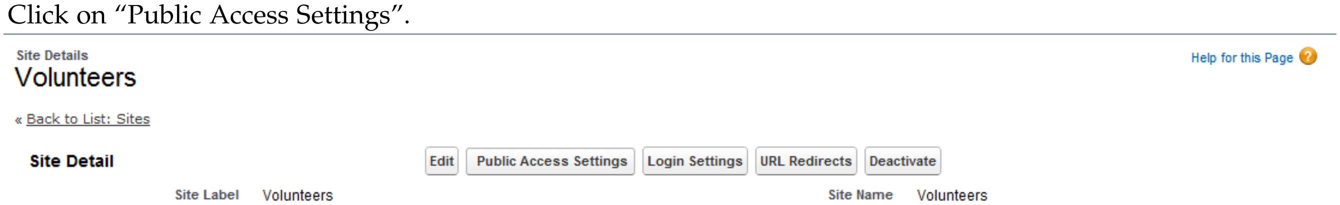
You now need to enable the specific Visualforce pages and classes that will be used on your SitemarginnoteIf you do not follow these steps, potential volunteers will not be able to edit the fields on your sites.:

1. Go to Setup > App Setup > Develop > Sites

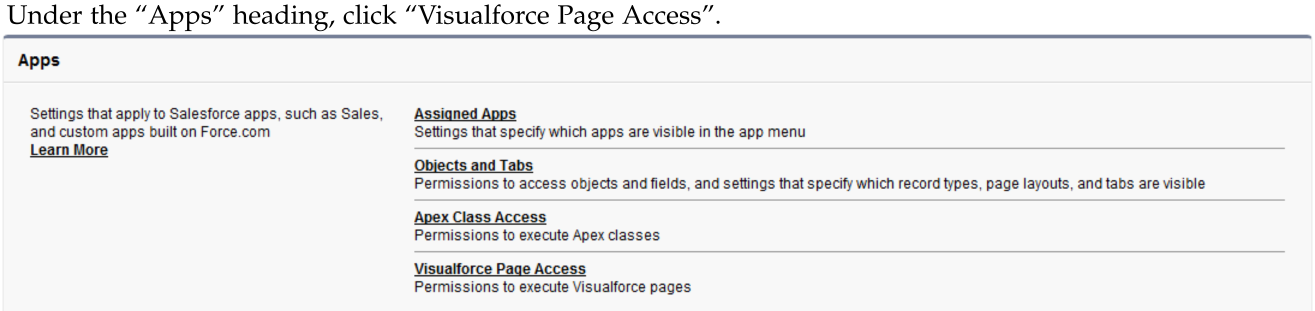
2. Click on the label for the site you created above to go to its detail page.



3. Click on "Public Access Settings".



4. Under the "Apps" heading, click "Visualforce Page Access".



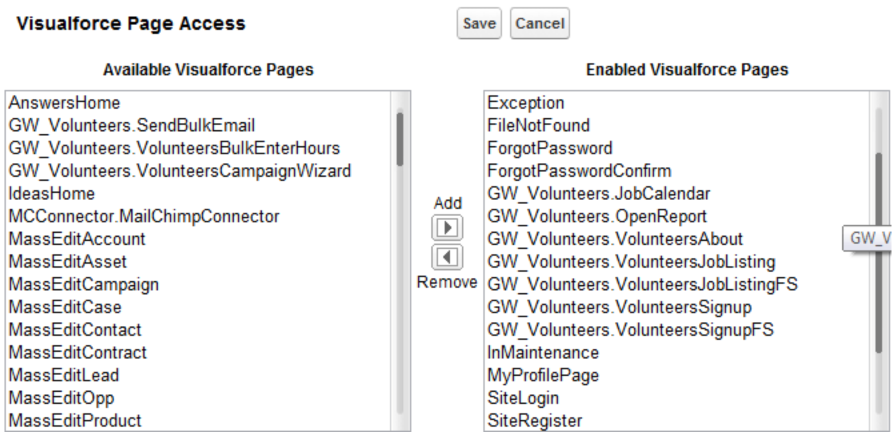
5. Click "Edit".

   (a) Click on "GW_Volunteers.VolunteersSignup" to select it and click on the "Add" button.

(b) Click on “GW_Volunteers.VolunteersJobListing” to select it and click on the “Add” button.

(c) Click on “GW_Volunteers.VolunteersSignupFS” to select it and click on the “Add” button.

(d) Click on “GW_Volunteers.JobCalendar” to select it and click on the “Add” button.

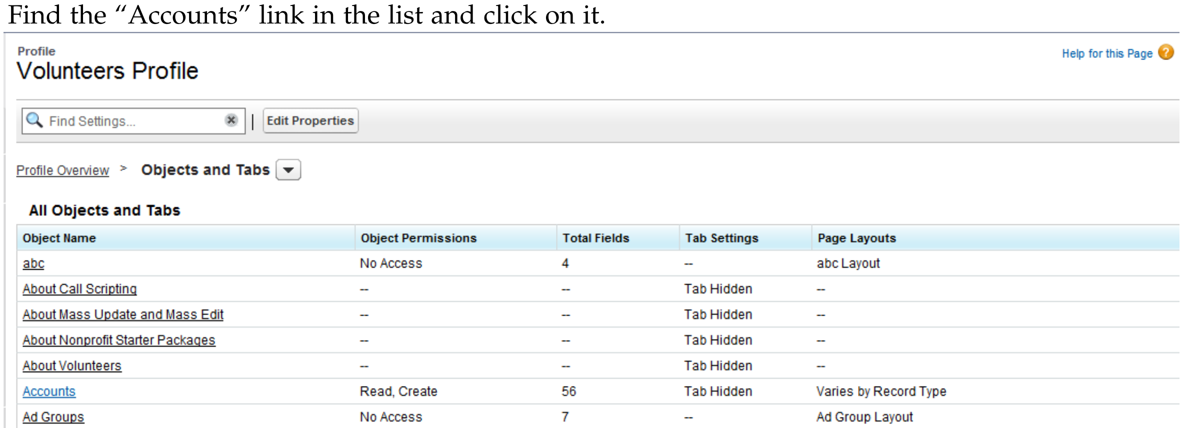


6. Click on “Save”.

7. This should bring you back to the Profile page for your site. Click on “Edit” again.

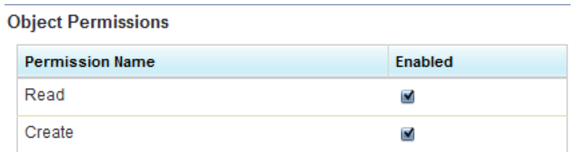
8. Under the “Apps” section, click on “Objects and Tabs”.

9. Find the “Accounts” link in the list and click on it.



(a) Click on the “Edit” button.

(b) Under “Object Permissions” make sure the “Read” and “Edit” permissions are both checked.



Object Permissions

Permission Name	Enabled
Read	☑
Create	☑

(c) Under “Field Permissions”, make sure that “Read” and “Edit” are checked for every field that you wish to make visible on the volunteer signup form that you will eventually put on your site[16].

(d) Click “Save”.

10. Repeat steps a-d for the “Campaigns”, “Contacts”, “Documents[17]”, ”Households”, “Leads”, “Volunteer Hours”, “Volunteer Jobs”, and “Volunteer Shifts” objects.

[16] It helps to have all of the fields created before performing this step, though it is not necessary. If you create a custom field in the future or wish to include a default field, you can make it available using this menu.

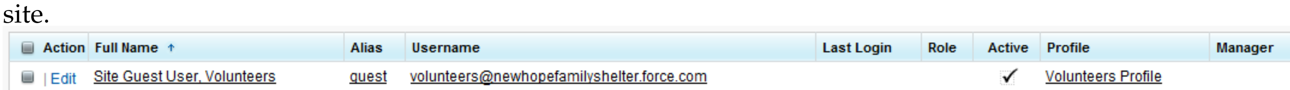
[17] For the "Documents" object, you need only set the permissions to "Read", not "Read" and "Edit".

Setting the Correct Time Zone

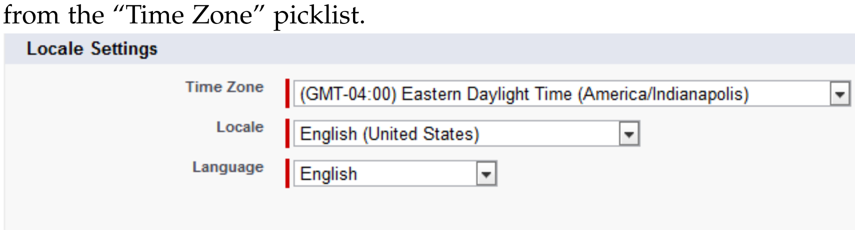
You need to tell Salesforce what time zone to display Job Shift dates & times with. It defaults to GMT, so if this is not the time zone you want, you must change it:

1. Go to Setup > App Setup > Develop > Sites
2. Click on the label for your site to go to its detail page.
3. Click on "Public Access Settings".
4. Click on the "Assigned Users" button.

5. Click on the "Edit" button next to the Guest User account for your site.



6. Scroll to "Locale Settings" and choose the appropriate time zone from the "Time Zone" picklist.



7. Click on the "Save" button.

Enabling Your Site

Now the site must be enabled:

1. Go to Setup > App Setup > Develop > Sites.
2. Click on the “Activate” link for the site.

Testing Your Site

Now you should test the site to make sure it is set up properly:

1. Go to Setup > App Setup > Develop > Sites

2. Click on the “Site URL” for your site.

Sites (newhopefamilyshelter.force.com) New

Action	Site Label ↑	Site URL	Site Description	Active	Last Modified By
Edit | Deactivate	Volunteers	http://newhopefamilyshelter.force.com/volunteers		✓	John Towers, 3/14/2012 1:57 PM

3. This will display the default home page that you chose above (if you didn’t change it, it will show the “Under Construction” page.

4. If the link goes to the correct page, go to the address bar and add */GW__Volunteers__VolunteersSignup* to the end of the URL[18].

5. Enter some test data in the form and click “Submit”.

6. Depending on your settings, you should have created either a new Lead or a new Contact. Check the appropriate place to make sure that the Lead or Contact was created successfully.

[18] For example, the site URL in the screenshot is http://newhopefamilyshelter.force.com/volunteers, so the link to the volunteer sign up page for that is http://newhopefamilyshelter.force.com/volunteer/GW__Volunteers__VolunteersSignup

Integrating Volunteer Signup into Your Website

Now that you have the form working as a stand alone web page, you can integrate it into a page on your own website. This is accomplished by embedding an iframe on your site. It should something like:

```
<iframe src="[site-url]/GW_Volunteers__VolunteersSignup" frameborder="0"
 scrolling="false" height="600" width="500"></iframe>
```

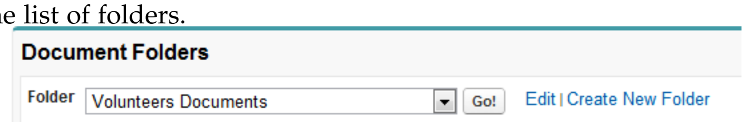
You should edit the properties of the <iframe> tag to fit your needs. If you are not familiar with HTML, use this page for reference.

Styling the Volunteer Signup Form

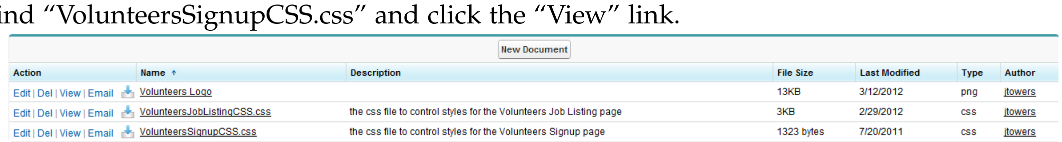
The Volunteer Signup form page uses a CSS file that is installed to your Salesforce database. You can modify the contents of the CSS file to change the signup form to match the style of your organization's website:

1. Go to the "Documents" tab[19].

2. At the "Documents" page, choose "Volunteers Documents" from the list of folders.



3. Find "VolunteersSignupCSS.css" and click the "View" link.



4. This will display CSS currently used by the Volunteers Signup form. Copy the CSS[20] into a text editor and modify it as you wish.

5. Save the modified CSS to your local machine.

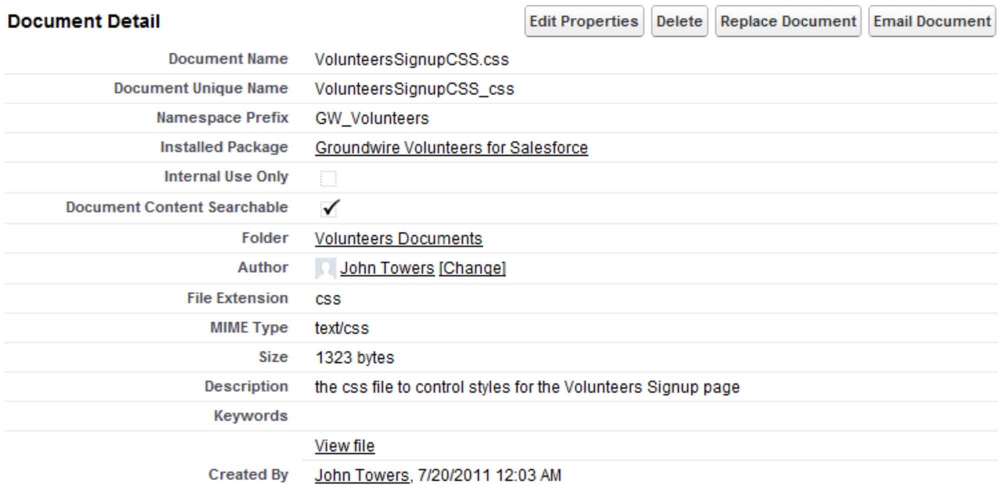
6. Go back to the "Volunteers Documents" folder in the "Documents" tab.

7. Click on "VolunteersSignupCSS.css"

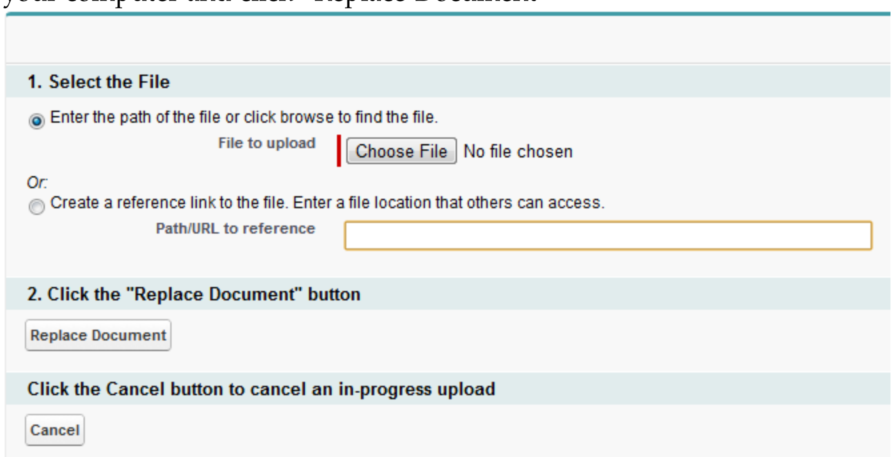
8. Click on the "Replace Document Button.

[19] This should be in the list of tabs across the top of the page that begins with the "Home" tab. If it is not there, at the end of the list of tabs there should be a + symbol. Click it and choose "Documents" from the list of tabs that appears.

[20] Note: The CSS has a section that is commented out. Uncommenting this will change the styles to give you an idea of what elements of the page can be styled with CSS.
Ff you are unfamiliar with CSS you can find tutorials online.



9. On the "Replace Document" page, choose the file that you saved to your computer and click "Replace Document"



10. Refresh your Volunteer Signup page to see your new style. .

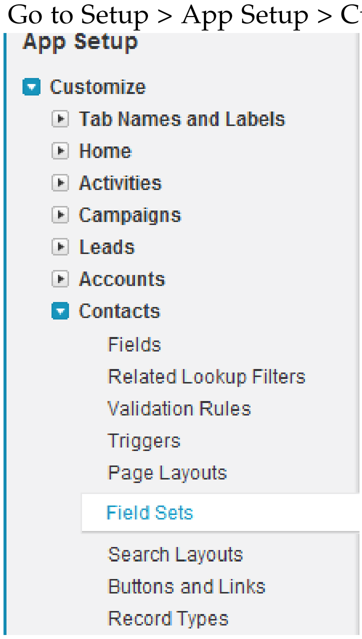
Note: When new versions of Volunteers for Salesforce modify this file, Salesforce will not update your document when you upgrade. You must manually edit the CSS file and upload it to include newer markup. Release notes will point out when this is necessary)

Customizing the Fields Displayed on the Volunteer Signup Form

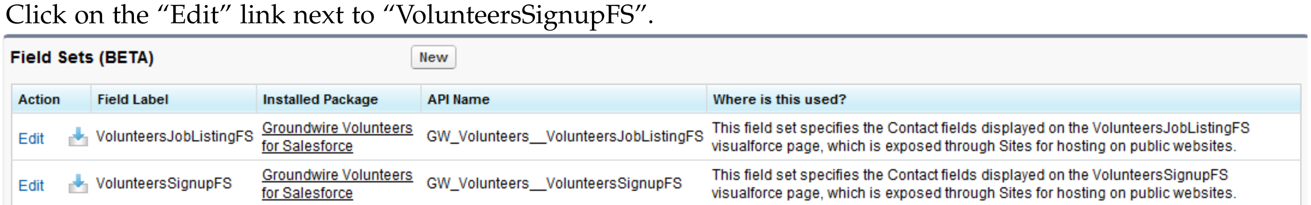
Volunteers for Salesforce allows you to customize the fields displayed on the signup form using Field Sets [21]. To customize the fields use the following process:

[21] To use page with field sets, you must direct users to the GW__Volunteers__VolunteersSignupFS page instead of the GW__Volunteers__VolunteersSignup in the steps above.
Note: The field sets page does not support creating Leads, so if you have Volunteers set up to create Leads from web signups instead of contacts, you cannot use this feature.

1. Go to Setup > App Setup > Customize > Contacts >Field Sets



2. Click on the "Edit" link next to "VolunteersSignupFS".


Field Sets (BETA) New

Action	Field Label	Installed Package	API Name	Where is this used?
Edit	VolunteersJobListingFS	Groundwire Volunteers for Salesforce	GW_Volunteers__VolunteersJobListingFS	This field set specifies the Contact fields displayed on the VolunteersJobListingFS visualforce page, which is exposed through Sites for hosting on public websites.
Edit	VolunteersSignupFS	Groundwire Volunteers for Salesforce	GW_Volunteers__VolunteersSignupFS	This field set specifies the Contact fields displayed on the VolunteersSignupFS visualforce page, which is exposed through Sites for hosting on public websites.

3. This will display a page similar to the Page Layout Editor we used

in one of the above steps.

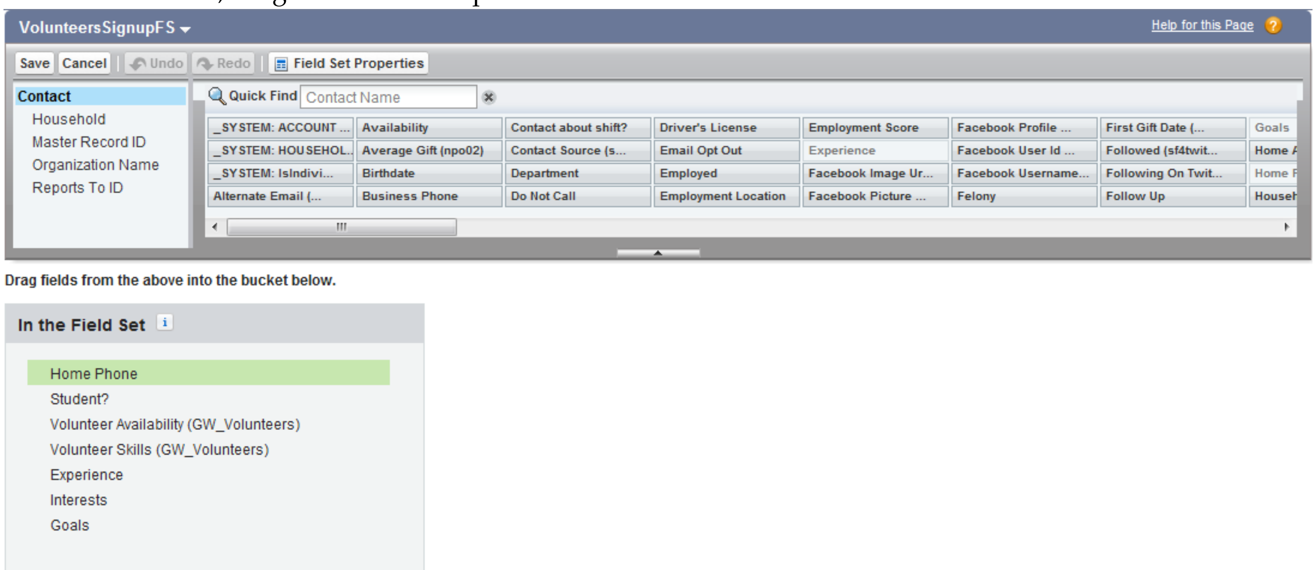
(a) To add a field to the signup form, drag it from the list of available fields to the “In the Field Set” box.

(b) To remove fields, hover over them and click the minus icon.

(c) To make the field required, hover over it and click the wrench icon, and then check the “required” box in the windows that appears.

Note: The VolunteersSignupFS page only supports adding fields from the Contacts object, so if you need to create custom fields for the signup form, you should create them under Contacts.

(d) To reorder the field, drag them to a new position.



4. When you are finished click “Save”.

5. Ensure that the fields that you added to the form are enabled for the volunteer sites user profile. To do this, refer to the Configuring Access chapter on page on page 45.

Localizing the Volunteer Signup Form

Volunteers for Salesforce supports localization into French. You can also localize into additional languages, which will be explained in a later section. In order to have VolunteersSignupFS display in a different language, you must include a parameter on the URL:

- Language – The language used to display labels that have associated translations in Salesforce. This value overrides the language of the user viewing the page. Possible values for this attribute include any language keys for languages supported by Salesforce, for example, "en" or "en-US". Volunteers for Salesforce also supports "fr" for French. An example: GW_Volunteers__VolunteersSignupFS?Language=fr

When you use the Language parameter, all of the field names, picklist values, and messages will be displayed in the specified language (assuming a translation is provided). Please review the section Enabling Localization in Volunteers for Salesforce to find out additional steps you must take.

Uploading Documents with the Volunteer Signup Form

The VolunteersSignupFS page and VolunteersJobListingFS page also support a URL parameter to tell the page to include a file upload button, thus allowing a document to be stored along with the matched or created Contact record:

- FileUploadLabel – a string to specify that a file upload button should be included on the page. The string is displayed as a label in the left column, next to the button. If the label contains spaces, you need to encode them in the URL with %20. An example: GW_Volunteers__VolunteersSignupFS?FileUploadLabel=Please%20include%20your%20resume

Integrating Volunteer Job Listings & Signup into your Web Site

Similar to hosting the VolunteersSignup page in your website, you can host the VolunteersJobListing or VolunteersJobListingFS page as well. Use and IFRAME tag similar to the following:

```
<iframe src="[site-rul]/GW_Volunteers__VolunteerJobListings" frameborder="0"
scrolling="false" height="600" width="500"></iframe>
```

The VolunteersJobListing page supports the following parameters on its URL:

- campaignId – a 15 character Salesforce ID of the Campaign to display jobs from. If not provided, the page will look at all Campaigns that are active. In either case, the page will then display all jobs that have "Display on Website" checked.
- ShowJobName – if set to 0 (zero), the job name is not displayed. Defaults to 1.
- ShowDescription – if set to 0 (zero), the job's description rich text field is not displayed. Defaults to 1.
- ShowLocationAddress – if set to 0 (zero), the job's address is not displayed. Defaults to 1.
- ShowLocationInfo – if set to 0 (zero), the job's location information rich text field is not displayed. Defaults to 1.
- ShowSkills – if set to 1, the job's desired skills are shown as a semicolon separated list. Defaults to 0 (zero).

- ShowShifts – if set to 0 (zero), the job's shifts are not displayed, and just a single Sign Up button per job is displayed. Note that if Shifts are being displayed, but a given job has no shifts, then that job will just have a single Sign Up button displayed. Defaults to 1.

VolunteersJobListingFS also supports these additional parameters:

- Language – The language used to display labels that have associated translations in Salesforce. This value overrides the language of the user viewing the page. Possible values for this attribute include any language keys for languages supported by Salesforce, for example, "en" or "en-US". Volunteers for Salesforce also supports "fr" for French.
- DateFormat – a formatting string that controls how Shift dates are displayed. It handles the following tokens:
  - MM – displays the numerical month, starting with a 0 if less than 10. (01 – 12)
  - M – displays the numerical month, with no starting 0. (1-12)
  - dd – displays the calendar day, with a starting 0 if < 10. (01 – 31)
  - d – displays the calendar day, with no starting 0. (1 – 31)
  - yyyy – displays a four digit year. (eg. 2011)
  - yy – displays a two digit year. (eg. 11) The default DateFormat string used, if not specified, is "m/d/yyyy".
- TimeFormat – a formatting string that controls how Shift times are displayed. It handles the following tokens:
  - hh – displays the hour from 1 - 12, with a leading zero if less than 10. (01 – 12)
  - h – displays the hour from 1 – 12, with no leading zero. (1 – 12)
  - HH – displays the hour from 1 – 23, with a leading zero if less than 10. (01 – 23)
  - H – displays the hour from 1 – 23, with no leading zero. (1 – 23)

  - mm – displays the minutes, with a leading zero if less than 10. (00 – 59)
  - m – displays the minutes, with no leading zero. (0-59) 0
  - tt – displays the time period as am or pm. The default TimeFormat string used, if not specified, is “h:mm tt”.

- FileUploadLabel – a string to specify that a file upload button should be included on the signup dialog. The string is displayed as a label in the left column, next to the button. If the label contains spaces, you need to encode them in the URL with %20. An example: GW_Volunteers__VolunteersJobListingFS?FileUploadLabel=Please%20include%20your%20resume

To specify parameters on a URL, you use the format:

```
baseurl?param1=value1&param2=value2&param3=value3 ....
```

So your URL might look like:

```
http://[url-to-page]?ShowLocationAddress=0&ShowSkills=1&Language=fr
```

Styling the Volunteer Listing Form

The VolunteersJobListing page uses a cascading style sheet (css) that is a css file document that the package installs into your Salesforce database. You are able to modify the contents of this file to provide your own css that has the styles defined to match your website. Follow the same instructions that are provided for the VolunteersSignup page on page on page 57. The only difference is that the css file is called VolunteersJobListingCSS.css.

Customizing the Fields Displayed on the Volunteer Job Listing Form

Volunteers for Salesforce now includes a Volunteer Job Listing page whose signup dialog you can customize with Field Sets. Field Sets allow a Salesforce administrator to specify which fields to include on a Visualforce page. To use this new customizable page, have your URL refer to GW_Volunteers__VolunteersJobListingFS, by just adding the FS to the end of the page name.

The VolunteersJobListingFS signup dialog will always first include the FirstName, LastName, and Email fields, since these are used for matching against existing Contacts. You are able to then specify the additional Contact fields you want on the form by modifying the Contact VolunteersJobListingFS field set. You are also able to specify any Volunteer Hours fields you would like on the signup dialog, by modifying the Volunteer Hours VolunteersJobListingFS field set. Modifying these field sets is as described under the previous section for the VolunteersSignup form on page on page 59.

Integrating Job Shift Calendar & Signup into your Web Site

Similar to hosting the VolunteersJobListingFS page in your website, you can host the JobCalendar page as well. Use and IFRAME tag similar to the following:

```
<iframe src="[site-url]/GW_Volunteers__JobCalendar" frameborder="0"
 scrolling="false" height="600" width="500"></iframe>
```

The JobCalendar page supports the all of the parameters for the VolunteersJobListingFS page[22] and the following additional parameters in its URL:

[22] The VolunteersJobListingFS page is opened when the user clicks on a shift in the calendar, and these parameters are passed on to the VolunteersJobListingFS page, to control its display and behavior.

- campaignId – a 15 character Salesforce ID of the Campaign to display job shifts from. If not provided, the page will look at all Volunteer Campaigns that are active. In either case, the page will then display all jobs that have "Display on Website" checked.

- volunteerJobId – a 15 character Salesforce ID of a specific job to display shifts from. If provided, this will set the calendar's date to the date of the first shift for that job.

- volunteerShiftId – a 15 character Salesforce ID of a specific job shift to display. If provided, this will set the calendar's date to the date of the specified Shift.

- Language – The language used to display labels that have associated translations in Salesforce. This value overrides the language of the user viewing the page. Possible values for this attribute include any language keys for languages supported by Salesforce, for example, "en" or "en-US". Volunteers for Salesforce also supports “fr” for French.

- Print – if set to 1, the calendar will display in a view optimized for printing on a single page. Defaults to 0 (zero).
- initialDate – a date and time value specified in GMT which will set the calendar’s current date.
- CalendarView – a string that’s either “month”, “agendaWeek”, or “agendaDay”, that set’s the calendar’s initial view. Defaults to “month”.

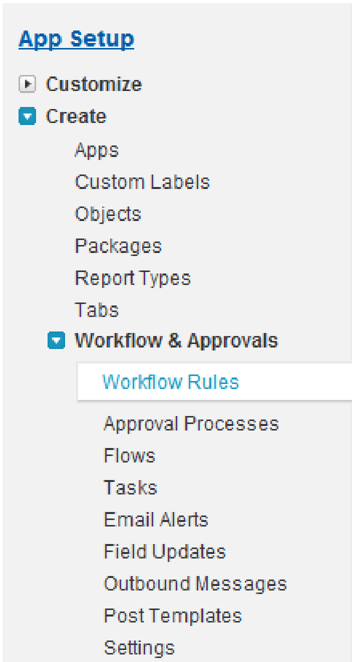
Controlling when Job Shifts are Full

All of the web pages that allow job shift sign up will display a Sign Up link as long as the Shift's Volunteers Still Needed field is greater than zero. The only volunteers that are counted against this field are those with an Hours Status of "Completed" or "Confirmed". By default, the web pages create new Volunteer Hours records with a Status of "Web Sign Up". Thus these sign ups will not change the number still needed and the job will continue to allow sign ups from the web page.

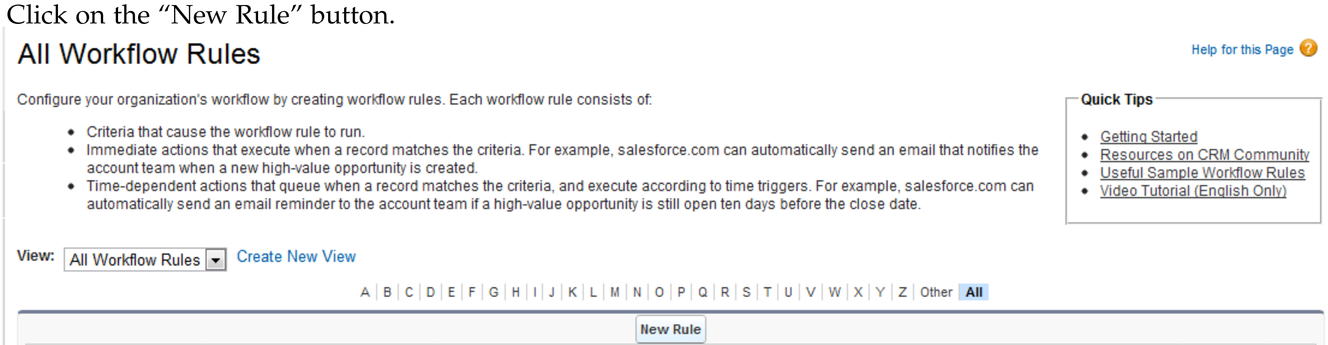
To cause the web page to display a shift as full, one must either change the Status on enough Volunteer Hours records from "Web Sign Up" to "Confirmed", or one can reduce the Desired # of Volunteers field on the Shift.

If you want the web sign ups to automatically become confirmed, so the shift will fill up with the first sign ups, you can create a workflow rule to update the Hours Status:

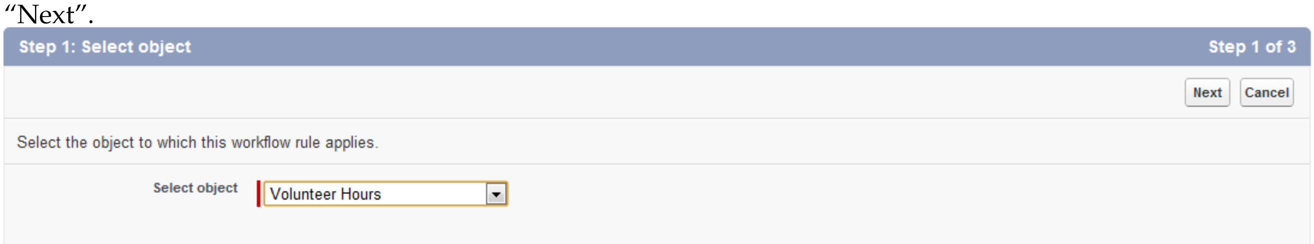
1. Go to Setup > App Setup > Create > Workflow & Approval Rules.



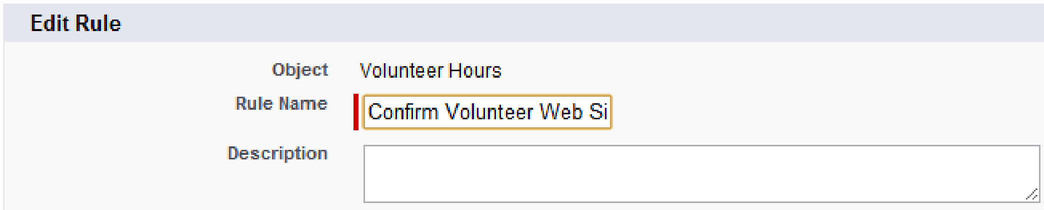
2. Click on the “New Rule” button.



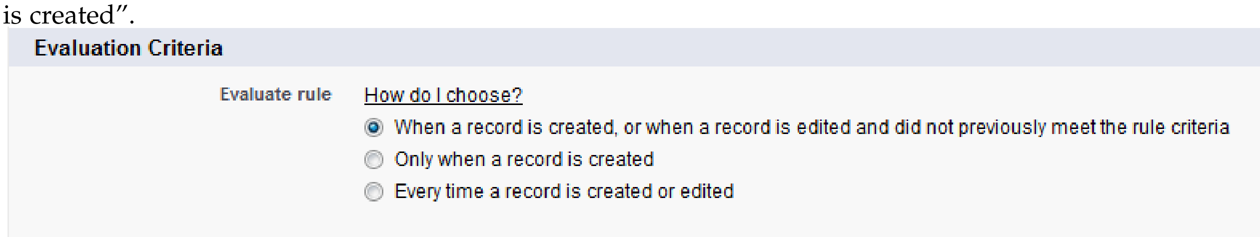
3. In the “Select object” picklist, choose “Volunteer Hours” and click “Next”.



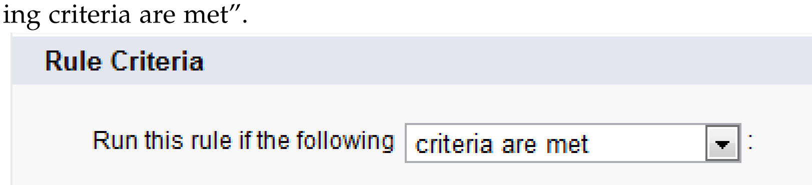
4. Name the rule “Confirm Volunteer Web Signups” or something similar.



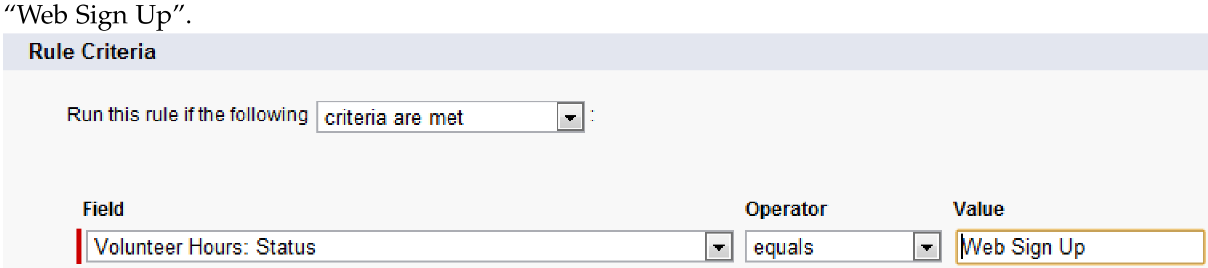
5. In the "Evaluation Criteria" section, choose, "Only when a record is created".



6. In the "Rule Criteria" section, choose "Run this rule if the following criteria are met".

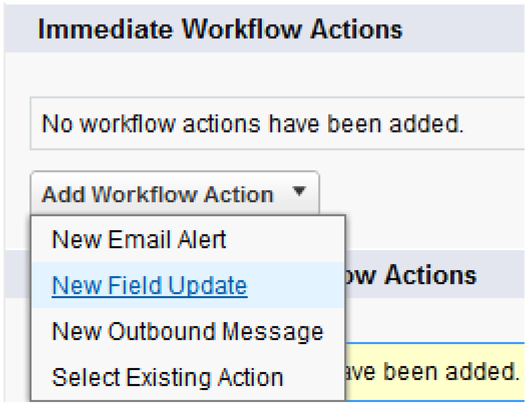


7. In the first row of the rule criteria, choose the "Volunteer Hours: Status" field, set the operator to "Equals", and change the value to "Web Sign Up".

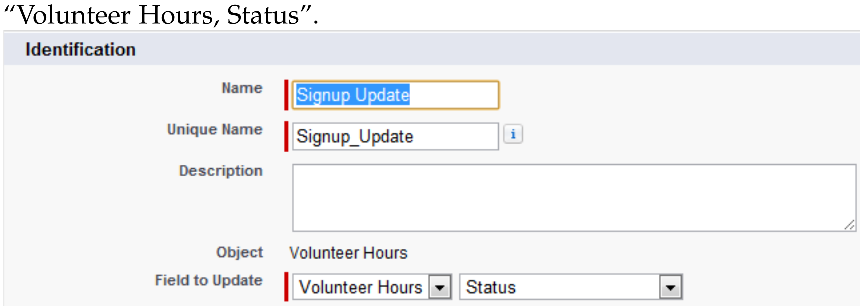


8. Click on the "Save & Next" button.

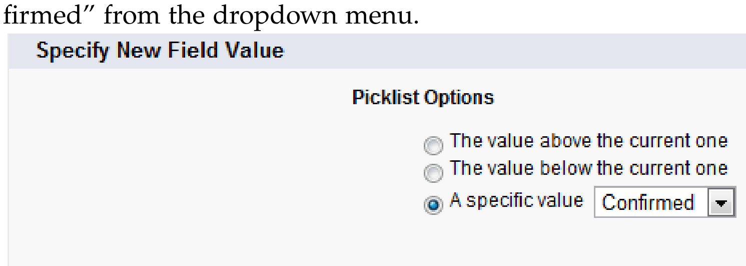
9. In the "Immediate Workflow Action" section on the next page, click on the "Add Workflow Action" dropdown and choose "New Field Update".



10. Fill in a name, and in the "Fields to Update" dropdown, choose "Volunteer Hours, Status".



11. In the options that appear, scroll to the "Specify New Field Value" section and choose "A specific value" and select "Confirmed" from the dropdown menu.



12. Click the "Save" button.

13. Click on the "Done" button.

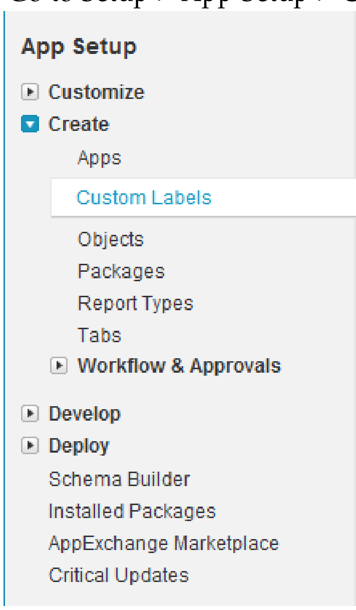
14. On the details page that appears, click on the "Activate" button to activate your workflow.

Changing the Colors used in the Job Shift Calendar

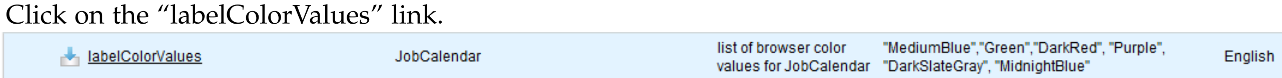
The Job Shift Calendar displays unique colors for each Job in the given month. All shifts for a given job will have the same color. The actual color values are stored in a custom label that you can override, if you want to use different colors[23].

[23] You need to first follow the instructions in the "Enabling Localization" chapter on page on page 83 to enable customizing labels.

1. Go to Setup > App Setup > Create > Custom Labels.



2. Click on the letter "L" in the navigation across the top.
3. Click on the "labelColorValues" link.



4. Click on the button for "New Local Translations/Overrides".
5. Put your new color names in the "Translation Text" box using the following format: double quote each color and separate them with commas.

The colors are used in order each month, so the first job of the month gets the first color (which is used for all shifts from this job), and the second job gets the second color, etc.

6. Click “Save”.

Part III

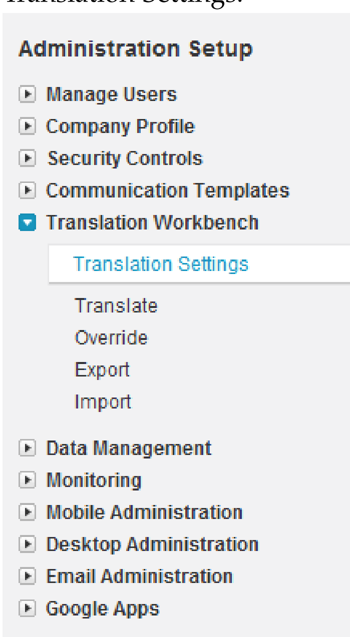
Localization and Renaming Labels

Enabling Localization

Volunteers for Salesforce supports English and French. In addition, you can provide support for additional languages, if you can provide translation for all the terms.

In order to enable localization support, you must turn on the Translation Workbench:

1. Go to Setup > Administration Setup > Translation Workbench > Translation Settings.



2. If you have not previously enabled the Translation Workbench, click “Enable”.

3. On the "Supported Languages" page, click the "Edit" link for each language you wish to support and do the following:

Supported Languages

Action	Language
Edit	English
Edit	German
Edit	Spanish
Edit	French
Edit	Italian
Edit	Japanese
Edit	Swedish
Edit	Korean
Edit	Chinese (Traditional)
Edit	Chinese (Simplified)
Edit	Portuguese (Brazilian)
Edit	Dutch
Edit	Danish
Edit	Thai
Edit	Finnish
Edit	Russian

   (a) On the "Language Translation Edit" page, check the "Active" checkbox, so it is enabled.

   Language

Language	English
Active	☐

   (b) If you want to do additional translating for that language, add the appropriate users to the list of translators.

   (c) Click "Save"

marginnoteIf you wish to translate Volunteers for Salesforce into a language that is not currently provided, or you wish to translate terms differently, please refer to Salesforce Help for full instructions on using the Translation Workbench. In addition, please contact Groundwire and let them know about your work. They would like to include additional languages with the Volunteers for Salesforce package. Here are some instructions on typical translations you may want to do:

Translate the Contact Volunteer Skills Picklist

1. Go to Setup > Administration Setup > Translation Workbench > Translate.
2. Pick the language that needs a translation in the "Language" dropdown.
3. In the "Setup Component" dropdown, choose "Picklist Value".
4. In the "Object" dropdown, choose "Contact".
5. In the displayed tree control, scroll down and find "Volunteer Skills".
6. Click on the "+" button and you will see a list of the picklist values displayed.
7. Hover over the middle column for each term and click on its pencil icon.
8. Enter the translation.
9. Repeat for each value in the picklist that needs translation.
10. Click on "Save".

Override the English Term for a Field or Button

1. Go to Setup > Administration Setup > Translation Workbench > Override
2. In the "Package" dropdown, choose "Groundwire Volunteers for Salesforce".
3. In the "Language" dropdown, choose "English".
4. In the "Setup Component" dropdown, choose the item you want to relabel.
5. In the "Object" dropdown, choose the object that has the item you want to relabel.
6. In the table that is displayed, hover your mouse over the "Label" override column in the appropriate row, and click on the pencil icon.
7. Enter the new label you want to use.
8. Repeat this step for all items you want to relabel.
9. Click "Save".

Exporting the Terms to be Translated

If you want to translate Volunteers for Salesforce into a new language, or you want to review all of the translations for a given language, you can export a file with all of the terms to be translated:

1. Go to Setup > Administration Setup > Translation Workbench > Export.
2. Choose "Bilingual"
3. Click on "Export"
4. When the export is complete, you will receive an email notification from Salesforce.
5. Go to the "Documents" tab.
6. In your "My Personal Documents" folder, you will find a zip file.
7. Save the zip file to your computer.
8. Extract the contents of the file to your computer.
9. You will end up with a .stf file for each language enabled in your Salesforce instance.
10. This is a tab delimited file that you can open in Excel[24].
11. Specify "Tab" for the delimiter and Unicode (UTF-8) for the the language.
12. The file will contain two sections:
    (a) Translated terms
    (b) Untranslated terms

[24] Excel will walk you through the steps required to import thise file. In order for Excel to correctly display accented characters, you should change the file's extension, ".stf" to ".txt"

13. For translated terms, you can update the translation by overwriting the current translation in column C.
14. For untranslated terms, you can specify the translation by overwriting the English term in column B.
15. When you are done translating, save the file[25].
16. Close Excel, choose “No” if it asks you to save again.
17. Excel introduces a problem that must be fixed:
    (a) Open the file you just saved in a text editor.
    (b) Open the Find and Replace function.
    (c) In the Find field, type a double quote (”).
    (d) Leave the Replace field empty.
    (e) Click on “Replace All”.
    (f) Choose “Save as” from the file menu.
    (g) Make sure the encoding is set to UTF-8.
    (h) Click “Save”.
18. Return to Salesforce to import the file.
19. Go to Setup > Administration Setup > Translation Workbench > Import.
20. Click on the “Choose File” button.
21. Select the “.stf” file from your computer.
22. Click on the “Import” button.
23. Salesforce will send you a notification when the operation completes.
24. Check the “Documents” tab for any errors.

[25] Excel will ask you if you want to keep the file in its current format. Choose "Yes".