Groundwire's

Volunteers for Salesforce Installation Guide

version 2.14

December 10, 2011

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1. OVERVIEW

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. It is always associated with a specific Campaign, and it includes rollup summary information of the number of volunteers and hours that have been applied to this 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 on Contact which include Availability, Skills, Status, and a rollup-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 rollup summary information of the number of hours and number of volunteers who have worked on all Volunteer Jobs in the Campaign.

2. INSTALLATION INSTRUCTIONS

The Groundwire Volunteers for Salesforce package is available as a managed package and source code. Visit the AppExchange for the managed project at http://appexchange.salesforce.com/listingDetail?listingId=a0N30000003JBggEAG, or the Google Code project at http://code.google.com/p/groundwire-volunteers-for-salesforce/ to find the links to the source code.

2.1 Requirements Before Upgrading

Upgrading an older version of Volunteers for Salesforce is easy, but we strongly encourage you to follow all the instructions for first time installation, to make sure you do it correctly. We also strongly recommend you review the Release Notes at http://code.google.com/p/groundwire-volunteers-for-salesforce/wiki/ReleaseNotes to find out about new features that might require some configuration on your part to get them working in your Salesforce database. These features are also described in this installation guide.

2.2 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.

Volunteers for Salesforce adds the following number of rollup summary fields: Campaign – 5, Contact – 3, Volunteer Jobs – 5. By default, Salesforce limits you to 10 rollup summary fields per object. You can ask Salesforce support to increase your limit per object, by entering a Support Case to Salesforce Support. **If you have 6 or more rollup summary fields on the Campaign object, Volunteers for Salesforce will fail to install.** You must have Salesforce increase your rollup summary field limit before installing.

CREATING A DEFAULT CAMPAIGN RECORD TYPE

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.

1. Go to Setup > App Setup > Customize > Campaigns > Record Types.
2. Click on the "**New**" button.
3. Use "**—Master—**" in the Existing Record Type picklist.
4. Fill in Record Type Label. We suggest "**Default**"
5. Use the Record Type Name that Salesforce fills in, when you fill out the Record Type Label.
6. For description, put in "**The default campaign record type to use for new campaigns.**"
7. Check "**Active**".
8. Check the "**Enable For Profile**" checkbox in the header, so that all profiles can use this new record type.
9. Check the "**Make Default**" checkbox in the header, so that all profiles will default to using this new record type.
10. Click "**Next**".
11. 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.
12. Click "**Save**".

2.3 Installation Steps

1. Visit the AppExchange and

   1.1. Go to the Groundwire Volunteers for Salesforce listing on salesforce.com's AppExchange.

   1.2. Click "**Get It Now**".

1.3. Provide your contact information and click on "**Submit**."

1.4. Enter your salesforce Username, Password and select whether you're a Salesforce Administrator, Salesforce User or a Free 30 Day Trial User. When finished, click "**Continue**."

1.5. Designate if you would like to install the app in your Production (including Developer Edition) or if applicable, in to your Sandbox.

1.6. Once you've read through salesforce.com's Terms of Service, click "**Continue**."

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

2.1. 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.

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

2.3. 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.

2.4. Now you're ready to install the application! Just click the "Install" button and Volunteers for Salesforce will be added into your salesforce.com account.

IN A NEW SALESFORCE DATABASE, OR A NEW SALESFORCE DATABASE WITH THE NON PROFIT STARTER PACK, VOLUNTEERS FOR SALESFORCE WILL INSTALL WITH NO APEX TEST FAILURES. IF YOU HAVE MODIFIED YOUR SALESFORCE DATABASE OR INSTALLED ADDITIONAL PACKAGES, THERE IS THE CHANCE THAT NEW VALIDATION RULES WILL CAUSE TESTS TO FAIL, DUE TO VOLUNTEERS' TEST CODE NOT KNOWING ABOUT THE NEW RESTRICTIONS. IF YOUR INSTALLATION FAILS WITH ERRORS, WE RECOMMEND TRYING AGAIN, CHECKING "**IGNORE APEX TEST FAILURES**" THAT MAY CAUSE THE INSTALLED APPLICATION NOT TO FUNCTION PROPERLY".

2.5. You will receive an email from Salesforce when the package has successfully been installed.

3. Completing the Installation with "Deploy"

3.1. 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.

3.2. Now that the application has been installed you have the option to immediately deploy the Custom Object components or choose to customize them first before rolling them out. We recommend you deploy now.

3.3. Go to Setup > App Setup > View Installed Packages, and click on the Package Name for Groundwire Volunteers for Salesforce.

3.4. The Package Details page will show you a listing of all of the package components. Click on "**Deploy**".

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

3.6. Almost done! You've now completed the initial installation of Volunteers for Salesforce and you will see a summary screen that displays the application details. In addition "**Volunteers**" now appears in the AppExchange drop-down menu in the upper right-hand corner of your salesforce.com account.

3.7. Follow the remaining notes in the Requirements: After Installation section of this document.

2.4 Requirements: After Installing

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.

UPDATING CONTACT & 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. These instructions assume you have permissions to do this.

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

2. Click on the "**Edit**" link for the normal Lead Layout.

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/Drop these into your page layout where you prefer. We suggest you create a Volunteer Information section first.

5. Click on the "**Save**" button.

Similarly, for Contacts, do the following:

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.
   NOTE TO UPGRADERS: SOME OF THESE FIELDS WERE ADDED IN SUBSEQUENT VERSIONS, AND THUS REQUIRE YOU TO STILL DO THIS STEP.

4. Drag/Drop these into your page layout where you prefer. We suggest you create a Volunteer Information section first.

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

6. Scroll to the right, and you will see the Volunteer Hours related list.

7. Drag/Drop this related list into your page layout, wherever you prefer.

8. Click on the "**Save**" button.

UPDATING VOLUNTEER CAMPAIGN, VOLUNTEER JOB & VOLUNTEER SHIFT PAGE LAYOUTS

Starting in version 1.17, Volunteers for Salesforce provides several custom buttons for using the Mass Email Volunteers feature. Starting in version 1.53, Volunteers for Salesforce provides several custom buttons for using the Shift Calendar page, and for using the Volunteer Roster report.

If you are upgrading your installation from an earlier version, you must manually add the appropriate buttons to your page layouts. The following instructions will step you through the process of modifying your page layouts. These instructions assume you have permissions to do this.

1. Go to Setup > App Setup > Create > Objects.

2. Click on the "**Volunteer Job**" label.

3. From the Page Layouts section, click on "**Edit**" for Volunteer Job Layout.

4. In the Layout Editor, click on "**Buttons**" in the top section. This will display all standard and custom buttons you can add to the page layout.

5. Click and drag the "**Mass Email Volunteers**", "**Shift Calendar**", and "**Volunteer Roster**" buttons down to the Custom Buttons section near the top of the page layout.

6. Click on the "**Save**" button.

7. Perform these same set of steps for the Volunteer Shift custom object.

You should also modify the page layout for Volunteer Campaigns.

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

2. Click on the Edit link for the Volunteers Campaign Layout.

3. In the Layout Editor, click on "**Buttons**" in the top section. This will display all standard and custom buttons you can add to the page layout.

4. Click and drag the "**Shift Calendar**" and "**Volunteer Roster**" buttons down to the Custom Buttons section near the top of the page layout.

5. Click on the "**Save**" button.

VOLUNTEER SKILLS & AVAILABILITY

The Groundwire Volunteers package is designed to be used in an ongoing fashion. There are some field picklists that are used in Leads, Contacts and Volunteer Jobs, that you will want to modify initially, and potentially in the future. Note that modifying these picklists will not affect any information already saved in Salesforce, so changing the values won't affect your old Volunteer information.

- Volunteer Skills (a multiselect picklist with various sample skills)
- Volunteer Availability (a multiselect picklist with various sample time periods)

In order to modify any of these picklists, do the following:

1. Go to Setup > App Setup > Customize > Leads > Fields.
2. Scroll down to the Custom Fields & Relationships section.
3. Click on the label for either "**Volunteer Skills**" or "**Volunteer Availability**."
4. From the Picklist Values section, click on the "**Del**" link for any choices you do not want to use.
5. From the Picklist Values section, click on the "**New**" button to add any new choices you want.
6. Follow the same steps for Contacts (Setup, App Setup, Customize, Contacts, Fields).
7. Be sure to provide the same set of choices in both the Lead and Contact picklist fields.

You must also modify one of these picklists in the Volunteer Job custom object:

1. Go to Setup > App Setup > Create > Objects.
2. Click on the label for "**Volunteer Job**."
3. Scroll down to the Custom Fields & Relationships section.
4. Click on the label for "**Skills Needed**."
5. Modify the Picklist Values section to match the choices you have on Contacts and Leads.

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:

- 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.
- 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.

- 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.

In order to modify any of these settings, do the following:

1. Go to Setup > App Setup > Develop > Custom Settings.
2. Click on the "**Manage**" link for Volunteers Settings.
3. If the Default Organization Level Value holds settings, click on the "**Edit**" button.
4. If there is no Default Organization Level Value settings, click on the "**New**" button, and fill out the Volunteers Settings Information.
5. You can specify anything for the Name field.
6. Click "**Save**."

SPECIFYING LEAD TO CONTACT FIELD MAPPINGS

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.
3. Specify that Volunteer Availability, Volunteer Notes, Volunteer Skills, and Volunteer Status all map to their associated field on the Contact record.
4. Click on the "**Save**" button.

ENSURE LEAD VOLUNTEER STATUS FIELD DEFAULT VALUE

In versions 1.11 and earlier, Volunteers for Salesforce accidentally had the default value for the Volunteer Status field on Leads set to "New Sign Up". This would incorrectly cause all new leads to appear as if they were new volunteers. **Please do the following to set the default value to null:**

1. Go to Setup > App Setup > Customize > Leads > Fields.
2. Scroll down to the Lead Custom Fields section.
3. Find the custom Lead field Volunteer Status, and click on its name

4. Find the Picklist Values section, and click on the "**Edit**" link for the New Sign Up value.

5. Uncheck the default checkbox and click "**Save**."

This default value has been correctly set to null in versions 1.12 and later, but if you had previously installed an earlier version, you must still make this manual change.

ENSURE ACTIVITIES ALLOWED ON VOLUNTEER JOBS & VOLUNTEER SHIFTS

In version1.17, the Mass Email Volunteers feature was added. This feature allows one to send emails to all the volunteers signed up for a job and/or shift. The feature optionally allows one to log an activity that the email was sent. Creating the activity requires that Volunteer Jobs and Volunteer Shifts have the Track Activities option set. If you are upgrading from an earlier version, this option may not be set and must be manually turned on.

1. Go to Setup > App Setup > Create > Objects.

2. Click on the "**Edit**" link for Volunteer Job.

3. In the Optional Features section, make sure "**Allow Activities**" is checked.

4. Click on "**Save**."

5. Perform the same set of steps for the Volunteer Shift custom object.

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 V navigation link to see just the Volunteers workflows.

3. Click on the "**Activate"** link for **Volunteer Hours – Set End Date**, if it is not enabled.

2.5 Email Notifications & 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 > Workflow & Approvals > Workflow Rules.

2. Scroll down to the bottom of the Workflow Rules, and you will see the Volunteer related workflows.

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

The **Volunteer Signup – Lead** workflow rule is fired when a new lead is created, and the Volunteer Status field is set to "New Sign Up".

The **Volunteer Signup – Contact** workflow rule is fired when a new or existing contact is edited, and the Volunteer Last Web Signup Date field is changed. Versions earlier than 1.14 would only fire this rule if the contact was newly created and the Volunteer Status field was set to "New Sign Up". If you have upgraded from a version before 1.14, we recommend editing your rule criteria to the following, so existing contacts will receive thank yous whenever they sign up to volunteer from your website.

```
OR(ISCHANGED( GW_Volunteers__Volunteer_Last_Web_Signup_Date__c ),
AND(ISNEW(), NOT(ISNULL(GW_Volunteers__Volunteer_Last_Web_Signup_Date__c ))))
```

Both of these Workflow Rules 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:

1. Go to Setup > Administration Setup > Email Administration > Organization-Wide Addresses.
2. Click on the "**Add**" button.
3. Provide a Display Name (e.g., Volunteer Manager) and a valid email address.
4. Select "**Allow All Profiles to Use this From Address**".
5. Click "**Save**".
6. Salesforce will send a validation email to the email address you have specified, and you must click on the validation link in order to enable this new Organization-Wide Address for use.

Once you have a valid Organization-Wide Address you would like to use for these email Thank Yous, do the following:

1. Go to Setup > App Setup > Create > Workflow & Approvals > Email Alerts.
2. Scroll down to the bottom of Email Alerts, and you will see the Volunteer related email alerts (or you can first choose "**Volunteer Email Alerts**" from the View picklist).
3. Click on the "**Edit**" link for the appropriate Volunteer Signup Thank You Email Alert.
4. Scroll to the bottom of the page, and you can choose any of your Organization-Wide Addresses from the From Email Address picklist.
5. Click "**Save**".
6. Remember to do the same steps on the other Thank You email alert.

The Volunteer Signup Notification Email – Contact and Volunteer Signup Notification Email – Lead both send their email to the Contact or Lead's owner. Due to these rules being run when the website creates the contact, the record owner is set to "volunteers Site Guest User". If the contact already existed in the database, then the email will be sent to the current record owner. If you prefer having these notification emails sent to your Volunteer Manager, regardless of who owns the actual Lead or Contact record, you should modify the Recipients of these two alerts.

1. Go to Setup > App Setup > Create > Workflow & Approvals > Email Alerts.
2. Scroll down to the bottom of Email Alerts, and you will see the Volunteer related email alerts.
3. Click on the "**Edit**" link for the appropriate Volunteer Signup Notification Email Alert.
4. Modify the Recipients list.
5. Click on the "**Save**" button.

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.

1. Go to Setup > Administration Setup > Communication Templates > Email Templates.
2. Choose the "**Volunteers Email Templates**" folder, and you will see the Volunteer related templates.
3. Click on the "**Edit**" link for each one, and modify as appropriate.
4. Click on the "**Save**" button.

2.6 Customizing the Volunteers Wizard

With version 1.16, 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.

1. Go to Setup > App Setup > Customize > Campaigns > Field Sets
2. Click on the "**Edit**" link for `VolunteersWizardFS`
3. This will display a page that is very similar to the Page Layout Editor.
4. To add fields to the Field Set, just drag them from the top section into the "**In the Field Set**" box.
5. To remove fields from the Field Set, mouse over the field, and click the X icon.
6. To reorder fields in the Field Set, just use drag and drop.
7. To make a field required, mouse over the field, and click the Tools icon.
8. When you are done, click "**Save**."
9. Note that even though the editor allows you to drag related fields from various lookup fields, the `VolunteersWizardFS` page only supports fields directly on Campaigns.

Also starting in version 1.16, Volunteers for Salesforce will copy over all fields, including custom fields, on Volunteer Jobs and Volunteer Shifts, if the user chooses the Clone Existing Campaign functionality in the Volunteers Wizard.

2.7 Customizing Mass Edit Volunteer Hours

With version 1.16, 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 Setup > 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. This will display a page that is very similar to the Page Layout Editor.
6. To add fields to the Field Set, just drag them from the top section into the "**In the Field Set**" box.
7. To remove fields from the Field Set, mouse over the field, and click the X icon.
8. To reorder fields in the Field Set, just use drag and drop.
9. To make a field required, mouse over the field, and click the Tools icon.
10. When you are done, click "**Save**."
11. Note that even though the editor allows you to drag related fields from various lookup fields, the Mass Edit Volunteer Hours page only supports fields directly on Volunteer Hours.

3. CONFIGURING VOLUNTEER SIGNUP FOR YOUR WEBSITE

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). Follow the instructions below to enable this functionality.

3.1 Enabling Salesforce Sites

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. **Note that once set, you cannot modify this name, so make sure you use an appropriate name for your company.** The pages that Volunteers for Salesforce provides you will be hosted within pages owned by your website, so the actual Sites domain name will not be visible to users. But you may have future needs that would expose Sites pages directly to the user, so you should still choose an appropriate name.

3. Click on “**Check Availability**,” to make sure the name you gave is not already taken.
4. Read and check the “**Sites Terms of Use**.”
5. Click “**Register My Force.com Domain**.”

3.2 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 Site Edit page, fill in the fields with red vertical bars.
    a. Site Label – you can use anything, but we recommend “Volunteers”.
    b. Site Name – you can use anything, but we recommend “Volunteers”.
    c. Site Contact – choose the appropriate system administrator in your organization.
    d. Active Site Home Page – you can leave this to the default UnderConstruction page that Salesforce provided.
    e. All other fields can be ignored.

IF YOU DO ADD A VALUE TO THE DEFAULT WEB ADDRESS FIELD, MAKE SURE YOU INCLUDE THAT VALUE WHEN CONSTRUCTING URL’S TO THE SITES PAGES.

4. Click on “**Save**.”

3.3 Configuring Access

You now need to enable the specific Visualforce pages and classes that will be used on your Site. **If you fail to do these steps, when you run your pages from Sites, fields will not allow editing.**

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. Scroll down to the Enabled Visualforce Page Access section, and click on “**Edit**.”

   Click on `GW_Volunteers.VolunteersSignup` to select it, and then click on the “**Add**” button.
5. Click on `GW_Volunteers.VolunteersJobListing` to select it, and then click on the “**Add**” button.
6. In version 1.14 and later, also click on `GW_Volunteers.VolunteersSignupFS` to select it, and then click on the “**Add**” button.

In version 1.14 and later, also click on `GW_Volunteers.VolunteersJobListingFS` to select it, and then click on the "**Add**" button.

In version 2.0 and later, also click on `GW_Volunteers.JobCalendar` to select it, and then click on the "**Add**" button.

7. Click on "**Save**."
8. You should be back at the Profile page for your Site.
9. Click on "**Edit**."
10. Scroll down to the Standard Object Permissions section, and click on the Read and Create checkboxes for Accounts, Campaigns, Contacts and Leads. Also click on the Read checkbox for Documents.
11. Scroll down to the Custom Object Permissions section, and click on the "**Read**" and "**Create**" checkboxes for Volunteer Hours, Volunteer Jobs, and Volunteer Shifts.
12. If you are using the Non Profit Starter Pack, or other custom configuration that includes a Household object, you should also click on Read and Create for Households.
13. Click on "**Save**."
14. Scroll to the Field-Level Security section.
15. For the Standard Objects (Account, Campaigns, Contacts, Leads), click on the "**View**" link, and make sure that any fields you specify in the field sets for your web pages (described later), have Visible checked.
16. Make any edits needed, and then click on "**Save**."
17. For the Custom Objects, Volunteer Jobs, Volunteer Shifts, and Volunteer Hours, make sure that any custom field you specify in the field sets for sets for your web pages (described later), have "**Visible**" checked.
18. Make any edits needed, and then click on "**Save**."

3.4 Setting the Correct Time Zone

You need to tell Salesforce what time zone to display Job Shift dates & times with. It defaults to GMT, which probably isn't what you want!

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 "**View Users**."
5. Click on the "**Edit**" link for the "Site Guest User, Volunteers" profile.
6. In the Locale Settings section, choose the correct time zone from the Time Zone dropdown.

7. Click on "**Save**."

3.5 Enabling Your Site

We now must enable your site.

1. Go to Setup > App Setup > Develop > Sites.
2. Click on the "**Activate**" link for your site.

3.6 Testing Your Site

Now you should test to make sure your Site is set up correctly and page displays.

1. Go to Setup > App Setup > Develop > Sites.
2. Click on the "**Site URL**" for your site.
3. This will display the default home page, which is the Under Construction page if you didn't change it in your Site details page.

   Now go to your browser's address bar, and add '`/GW_Volunteers__VolunteersSignup`' to the end of your site's URL. ***Note that there is a double underscore in the URL, between*** **`GW_Volunteers`** ***and*** **`VolunteersSignup`**. This should display the Volunteers Signup form. So your full URL will look something like http://mycompany.force.com/GW_Volunteers__VolunteersSignup.

   If you had specified a label for the Default Web Address field on the Site, then include this label in the URL. So it might look like:

   http://mycompany.force.com/sitelabel/GW_Volunteers__VolunteersSignup.
4. Enter some test data in the form and click on "**Submit**."
5. You should have successfully created a new lead or contact (depending on your custom settings) and their Volunteer Status field will be set to "New Sign Up".

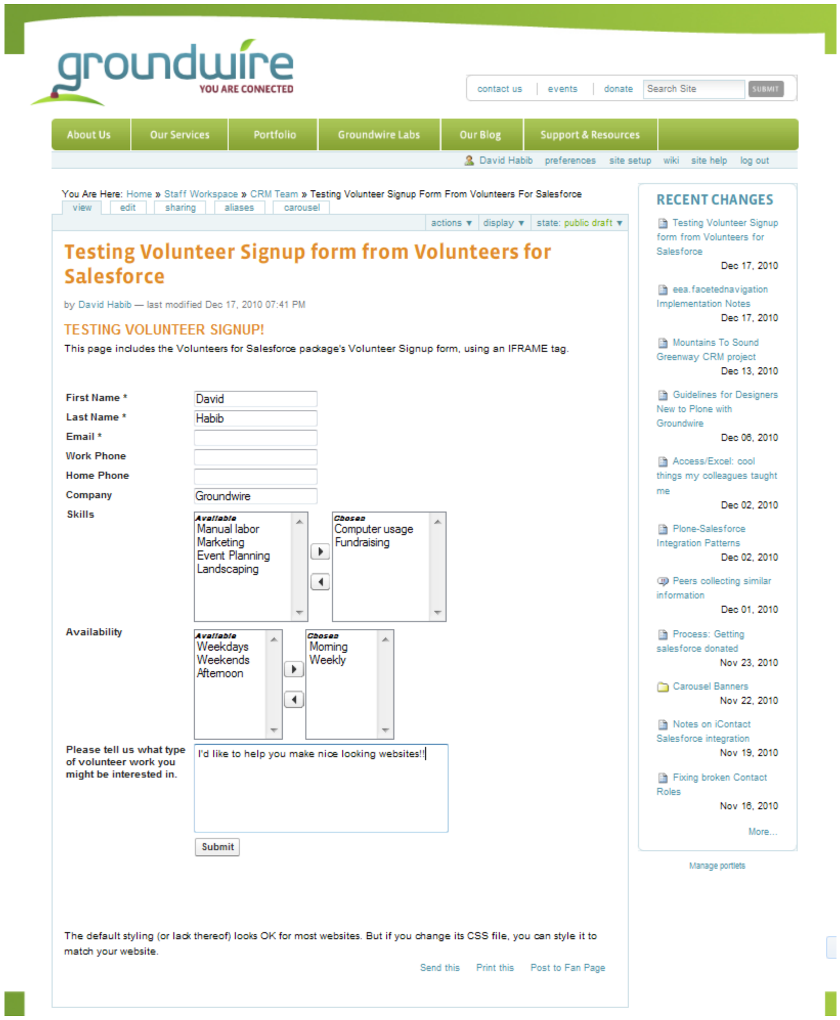
3.7 Integrating Volunteer Signup into your web site

Now that you have the form working as a stand alone web page, you will want to integrate it into a page on your website. The way to accomplish this is by using an <IFRAME> HTML tag to insert the Volunteer Signup page into a page from your website. This might look something like:

```
<iframe src="http://davidhabibnpsp-developer-
edition.na7.force.com/sitelabel/GW_Volunteers__VolunteersSignup"
 frameborder="0" scrolling="false" height="600" width="500"></iframe>
```

THERE IS A DOUBLE UNDERSCORE IN THE URL, BETWEEN GW_VOLUNTEERS AND VOLUNTEERSSIGNUP.

Here's what the form looks like on a website with minimal styling:



STYLING THE VOLUNTEER SIGNUP FORM

The Volunteer Signup form 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.

1. Go to the "**Documents**" tab, which you may have to click on the '+' tab to get access to.
2. Choose the "**Volunteers Documents**" folder.
3. Click on the "**View**" link for `VolunteersSignupCSS.css`
4. This will display the CSS used by the Volunteers Signup form.
5. Copy the CSS into your favorite editor, modify it as appropriate, and save it to your local machine as `VolunteersSignupCSS.css`
6. Note that the CSS has a commented out section with wild and unpleasant css, just to show you how different you can make the form look. (An example picture follows these steps.)

7. When you are ready to upload your CSS file, continue these steps

8. Go to the "**Documents**" tab, which you may have to click on the '+' tab to get access to

9. Choose the "**Volunteers Documents**" folder

10. Click on the name "`VoluntersSignupsCSS.css`"

11. Click on "**Replace Document**"

12. In the Replace page, enter the path to your local copy of `VolunteersSignupCSS.css` and then click on "**Replace Document**"

13. You should now be able to refresh the Volunteer Signup page on your website, and see the new styles.

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 CALL OUT WHEN THIS IS NECESSARY.

Here's a sample of the types of styling you can change:

With the above example you can see that when the Signup form is IFRAME'd into your page, it only occupies the colored portion of this page. The remainder of the page is controlled by you and your web site.

CUSTOMIZING THE FIELDS DISPLAYED ON THE VOLUNTEER SIGNUP FORM

With version 1.14, Volunteers for Salesforce now includes a Volunteer Sign Up page that 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__VolunteersSignupFS`, by just adding the **FS** to the end of the page name.

THIS NEW PAGE DOES NOT SUPPORT CREATING LEADS. IF YOU NEED VOLUNTEER SIGN UPS TO COME IN AS LEADS, WE RECOMMEND YOU USE OUR ORIGINAL VOLUNTEERSSIGNUP PAGE, OR SALESFORCE'S WEB-TO-LEAD FORM.

`VolunteersSignupFS` 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 `VolunteersSignupFS` field set. Here's how to do that:

12. Go to Setup > App Setup > Customize > Contacts > Field Sets
13. Click on the "**Edit**" link for `VolunteersSignupFS`
14. This will display a page that is very similar to the Page Layout Editor.
15. To add fields to the Field Set, just drag them from the top section into the "**In the Field Set**" box.
16. To remove fields from the Field Set, mouse over the field, and click the X icon.
17. To reorder fields in the Field Set, just use drag and drop.
18. To make a field required, mouse over the field, and click the Tools icon.
19. When you are done, click "**Save**."
20. Note that even though the editor allows you to drag related fields from various lookup fields, the `VolunteersSignupFS` page only supports fields directly on Contacts.
21. Make sure that the fields you have specified in the field set are enabled for the volunteer sites user profile. See the Configuring Access section above for details.

LOCALIZING THE VOLUNTEER SIGNUP FORM

With version 1.14, 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 VOLUNTEERS SIGNUP FORM

With version 1.17, 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%20yo
ur%20resume
```

3.8 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="http://davidhabibnpsp-developer-
edition.na7.force.com/sitelabel/GW_Volunteers__VolunteersJobListing"
 frameborder="0" scrolling="false" height="600" width="500"></iframe>
```

THERE IS A DOUBLE UNDERSCORE IN THE URL, BETWEEN GW_VOLUNTEERS AND VOLUNTEERSJOBLISTING.

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)
  - 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://mycompany.force.com/sitelabel/GW_Volunteers__VolunteersJobListingFS?ShowLocationAddress=0&ShowSkills=1&Language=fr&DateFormat=yyyy-MM-dd&TimeFormat=HH:mm
```

STYLING THE VOLUNTEER JOB 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. The only difference is that the css file is called `VolunteersJobListingCSS.css`.

Here's what the form looks like with minimal styling:

Bartending

Serve up the *best* booze in the USA to our *Wonderful* donors!

sign up	12/31/2010 1:00 AM	2.00 hours	4 people needed to setup the bars, and get all the drink supplies ready.
sign up	12/31/2010 3:00 AM	2.00 hours	serve drinks to guests at our 3 stations.
full	12/31/2010 5:00 AM	3.00 hours	serve guests at our 3 stations
sign up	12/31/2010 7:00 AM	4.00 hours	cleanup, cleanup!

Food Serving

Help serve the meal, refill water & coffee, and pickup dirty plates. ***Fun!***

sign up	12/31/2010 3:00 AM	2.00 hours	serving the meal, etc.
sign up	12/31/2010 5:00 AM	2.00 hours	pickup dirty plates, refill beverages, etc.
sign up	12/31/2010 7:00 AM	1.00 hours	pickup everything from all tables.

Invasive Removal @ Riverfront Park

Help remove invasive species and take care of trees MTSG planted in the last several years at Riverfront Park in North
All tools will be provided. Snow will cancel.

Riverfront Park in Renton

sign up	2/5/2011 5:00 PM	3.00 hours	Morning Team
sign up	2/5/2011 5:00 PM	6.00 hours	All Day Team
sign up	2/5/2011 8:00 PM	3.00 hours	Afternoon Team

CUSTOMIZING THE FIELDS DISPLAYED ON THE VOLUNTEER JOB LISTING FORM

With version 1.14, 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__VolunteersJobListing`**`FS`**`,` 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.

For Contact fields

1. Go to Setup > App Setup > Customize > Contacts > Field Sets
2. Click on the "**Edit**" link for `VolunteersJobListingFS`.

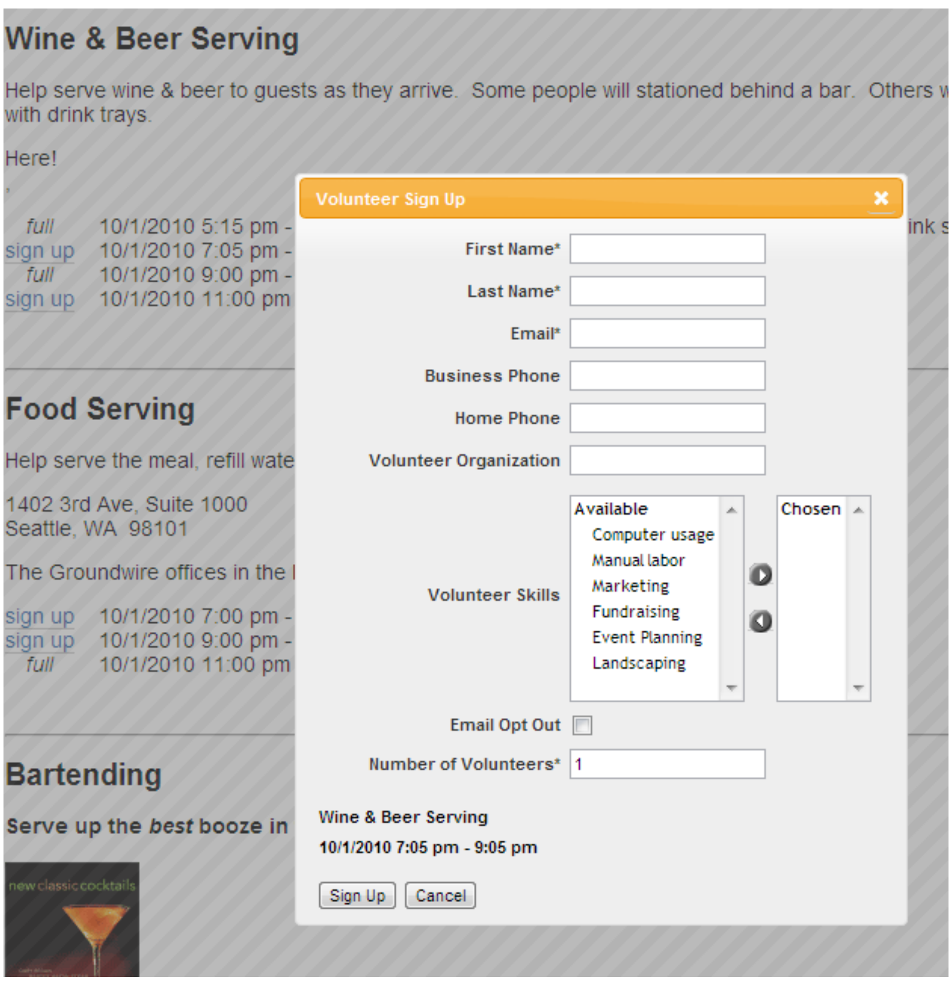
3. Do your edits as appropriate, and then click “**Save**.”

For Volunteer Hours fields

1. Go to Setup > App Setup > Create > Objects
2. Click on the label for “**Volunteer Hours**”
3. Scroll down to the Field Sets section
4. Click on the “**Edit**” link for `VolunteersJobListingFS`
5. Do your edits as appropriate, and then click “**Save**.”

Make sure that the fields you have specified in the field sets are enabled for the volunteer sites user profile. See the Configuring Access section above for details.

Here is a sample picture of what the Volunteers Job Listing signup dialog might look like with some customizations:



3.9 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="http://davidhabibnpsp-developer-
edition.na7.force.com/sitelabel/GW_Volunteers__JobCalendar"
frameborder="0" scrolling="false" height="600" width="500"></iframe>
```

THERE IS A DOUBLE UNDERSCORE IN THE URL, BETWEEN GW_VOLUNTEERS AND JOBCALENDAR.

The `JobCalendar` page supports the following parameters on its URL:

- 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".

Additionally, the `JobCalendar` page supports all of the parameters supported on the `VolunteersJobListingFS` page. 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.

3.10 Additional Customizations

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 & Approvals > Workflow Rules
2. Click on the “**New Rule**” button
3. In the Select object picklist, choose “**Volunteer Hours**”, and click on the “**Next**” button
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, choose “**Volunteer Hours: Status**” for field, “**Equals**” for operator, and “**Web Sign Up**” for value.
8. Click on the “**Save & Next**” button
9. In the Immediate Workflow Actions section, click on the “**Add Workflow Action**” dropdown button, and choose “**New Field Update**”
10. Fill in a Name, and in the Field to Update picklists, choose “**Volunteer Hours, Status**”
11. In the Specify New Field Value section, choose A specific value, and select “**Confirmed**”
12. Click on the “**Save**” button
13. Go back to the Workflow Rules page, and click on the “**Activate**” link for your new workflow rule.

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.

You need to first follow the instructions in section 4.1, Enabling Localization, to enable customizing labels. After you have done this, then do the following:

1. Go to Setup > App Setup > Create > Custom Labels
2. Click on the link for “**labelColorValues**”
3. Click on the button for “**New Local Translations/Overrides**”

4. Put your new color names in the Translation Text box, following the same format: double quote each name and separate with commas.

5. Click "**Save**"

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), THE SECOND JOB GETS THE SECOND COLOR, ETC.

CONTROLLING THE RECORD TYPE FOR CREATED CONTACTS

When you use the Job Listing web pages, or you specify the custom setting "Signup Creates Contacts If No Match" for the Volunteers Signup page, Volunteers for Salesforce will create new contacts with no specified contact record type. If you require these newly created contacts to have a specific record type, you can modify one of our Workflow Rules to achieve this.

1. Go to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules
2. Click on the Rule Name link for "**Volunteer Signup – Contact**"
3. In the Workflow Actions section, click on the "**Edit**" button
4. Click on the "**Add Workflow Action**" dropdown button, and choose "**New Field Update**"
5. Name the Field Update "**Set Volunteer Record Type**" or something similar
6. In the Field to Update picklist, choose "**Contact Record Type**"
7. In the Specify New Field Value section, choose your desired contact record type from the picklist
8. Click on "**Save**"

4. LOCALIZATION AND RENAMING LABELS IN VOLUNTEERS FOR SALESFORCE

With Volunteers for Salesforce, you are able to override English labels for all the various volunteer terminology. You are also able to translate volunteer terminology into a different language.

4.1 Enabling Localization

Starting with Version 1.14, 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 on the "**Enable**" button.
3. On the Supported Languages page, click the "**Edit**" link for each Language you want to support
4. On the Language Translation Edit page, check the "**Active**" checkbox
5. If you will want to do any additional translating for that language, add the appropriate Users to the Selected List.
6. Click on "**Save**."

If 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 us know about your work. We 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 all 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. Do this for all picklist values that need 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 appropriate item you want to relabel
5. In the Object dropdown, choose the appropriate 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. Do this for all items you want to relabel.

9. Click on "**Save**."

EXPORTING ALL 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 from Salesforce that tells you it is complete.

5. Go to the "**Documents**" tab (if Documents is not one of your tabs, click on the + button, and then click on the Documents link)

6. In your My Personal Documents folder, you will find a zip file with the .zip extension.

7. Save this file to your computer.

8. Decompress this file, to extract its contents.

9. You should end up with a .stf file for each language enabled in your Salesforce instance.

10. The file is a tab delimited text file.

11. You can open it with Excel, and Excel will walk you through import steps. In order for Excel to correctly display accented characters, you should rename the file extension to .txt, so that when you open it in Excel, you will be prompted to provide the delimeter and character set to use.

12. Specify Tab for the delimeter. For Language, specify Unicode (UTF-8).

13. The file will contain two sections, all Translated terms, and all Untranslated terms.

14. For translated terms, you can update the translation by overwriting the current translation, in Column C.

15. For untranslated terms, you can specify the translation by overwriting the English term. (Edit Column B, rather than putting it in Column C)

16. When you are done, choose "**Save**" from Excel.

17. Excel will ask you whether you want to keep it in the current format or not. Click on "**Yes**."

18. Close Excel, and if it asks you to save again, just choose "**No**."

19. Now you must fix one problem that Excel introduces!

a. Open the file in Notepad

b. Choose the Edit, Replace menu command

c. In Find What, type a double quote “

d. Leave Replace with empty

e. Click on the Replace All button

f. Choose the File Save As menu command

g. In the Encoding dropdown, make sure to choose UTF-8

h. Click Save

20. You are now ready to import the translations, as described below.

IMPORTING A TRANSLATION FILE

1. Go to Setup > Administration Setup > Translation Workbench > Import
2. Click on the “**Choose File**” button
3. Select the .stf file from your computer
4. Click on the “**Import**” button
5. You will receive email from Salesforce saying whether it succeeded or not.
6. You will need to look in the Documents tab for details on any problems encountered.

For more details on translating with Salesforce, please refer to Salesforce Help.