

## salesforce user training



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## We're here to help!

- This is new, but will be great
- There will be a learning curve
- It will take time
- We understand
- We will learn this together and step by step

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## Today

- What needs to transition to County Website
- Introduction to Salesforce CRM
- Personas (people using the entire system)
- Dashboard
- Understanding Organizations
  - Counties
  - Households

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## Terminology 101

### VMS

(Household)

County  
Project  
Volunteer  
Date

### HOC

Volunteer and any family that also volunteers  
Organization  
Volunteer Opportunity  
Contact  
Occurrence(s)

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## Terminology Examples

- Managing Organization: **Clark County**
- Volunteer Opportunity: **Garden Cleanup**
- Location: **Chadwick Learning Garden**
- Contact: **Pam Bennett**
- Connections: **List of volunteers who have signed up or shown interest**
- Occurrences: **April 10, 17 & 24 @ 9am**

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## Changes from VMS to HOC (use HOC)

- Photos now go into County website
- Documents now go into County website
- All else is in HOC
- HOC for the MGVs – Salesforce for Educators/Coordinators

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**Featured County Programs**

- 4-H Youth Development
- Agriculture and Natural Resources
- Community Development
- Family and Consumer Sciences
- EFNEP
- Master Gardener Volunteer
- SNAP-Ed

**Social Media**

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**Clark County Weekly 4-H**  
Clark County 4-H Families at Home

**Master Gardener Volunteers**

2020 MGVI Intern Training Classes and Information  
Become a Master Gardener Volunteer  
Brides & Blooms Newsletters  
MGV Documents  
MGV Photo Gallery  
Master Gardener Help Line  
Resources  
Snipley Park Gardens and Arboretum  
Upcoming Clark County Gardening Programs and Events

**Clark County**

4-H Youth Development  
Agriculture and Natural Resources  
Community Development  
EFNEP  
Family and Consumer Sciences  
Master Gardener Volunteers  
2020 MGVI Intern Training Classes and Information  
Become a Master Gardener Volunteer  
Brides & Blooms Newsletters

**MGV Documents**

General Meeting	Board Meeting	Financials
SPCA	By-Laws	MGV Training
Forms	Minutes	Committee Chairs
Administrative	Rescue	Committee Chairs
Committees		
Education	Fair Flower Show	Field Trials
Fundraising	Plant Sale	Greenhouse
Publicity	Perennial	Pollinator
SPCA	SPCA Jubilee	Feature Garden
	Miscellaneous	
Occasional Quantity Cooking	SPCA Historical Documents	

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**Proposed File Structure for Documents to Port from VMS**

- Committee Chair Forms
- Education Committee
- Fair Flower Show Committee
- Field Trials/Greenhouse Committee
- Fundraising Committee
- Garden and Plant Sale-Bration Committee
- Garden of Eden Committee
- MGV Reconnect and Revive Sessions
- Publicity Committee
- Perennial Committee
- Publicity Garden Committee
- Snipley Park Gardens and Arboretum Committee
- Snipley Park Gardens and Arboretum Jubilee Committee
- Springfield Foundation Feature Garden Committee
- Board Meetings
- General Meetings
- Financials
- MGV Training
- Administration
- MGV Rescue
- Occasional Quantity Cooking
- Snipley Park (Historical documents concerning move from Gateway to SPGA)

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**Proposed File Structure for Documents to Port from VMS**

- Committee Chair Forms
- Budget Request
- Budget Request for Additional Funds
- Annual Committee Chair Report
- Education Program Calendar Dates
- Add Events to Calendar
- Reimbursement Request
- Education Committee
  - Agendas
  - Meeting Minutes
  - Zoom Recordings
  - (Add Other Categories as Needed)
- Fair Flower Show Committee
  - Agendas
  - Meeting Minutes
  - (Add Other Categories as Needed)
- Field Trials/Greenhouse Committee
  - Agendas
  - Meeting Minutes
  - (Add Other Categories as Needed)
- Fundraising Committee
  - Agendas
  - Meeting Minutes
  - (Add Other Categories as Needed)
- Garden and Plant Sale-Bration Committee
  - Agendas
  - Meeting Minutes
  - (Add Other Categories as Needed)
- Garden of Eden Committee
  - Agendas
  - Meeting Minutes
  - (Add Other Categories as Needed)
- MGV Reconnect and Revive Sessions
  - Agendas
  - Meeting Minutes
  - Zoom Recordings
  - (Add Other Categories as Needed)

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**Clark County Committee Chair Forms**

View | Edit | Revisions

- 4-H Youth Development
- Agriculture and Natural Resources
- Community Development
- EFNEP
- Family and Consumer Sciences
- Master Gardener Volunteers
- 2020 MGVI Intern Training Classes and Information
- Become a Master Gardener Volunteer
- Brides & Blooms Newsletters
- MGV Documents
- Committee Forms
- MGV Photo Gallery
- Master Gardener Help Line
- Resources
- Snipley Park Gardens and Arboretum

- Budget Request
- Budget Request for Additional Funds
- Annual Committee Chair Report
- Education Program Calendar Dates
- Add Events to Calendar
- Reimbursement Request

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**What is CRM**

CRM stands for Customer Relationship Management. This technology allows you to manage relationships with your customers and prospects and track data related to all of your interactions.

It also helps teams collaborate, both internally and externally, gather insights from social media, track important metrics, and communicate via email, phone, social, and other channels.

**Before Salesforce** | **After Salesforce**

Data is stored in different places and on different devices | Data is all in Salesforce, accessible via the cloud from any device

**CFA** | [Salesforce Trailhead](#)

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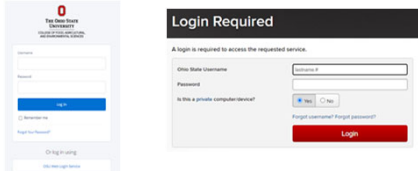
**personas**

- General Public** - Anyone who visits the MGVI portal that is unauthenticated; do not log in, no password, just visiting to see what we are about. (HOC)
- Potential Volunteer** - A person who is interested in becoming a new volunteer; HOC will direct them to the State MGVI website and your County details. Your County MGVI information must be up to date. (HOC)
- Volunteer** - A person who has been on-boarded (application and all processes are completed, intern training and hours completed) and is eligible to volunteer. (HOC)
- County Coordinator** - A representative of a county that manages volunteers and/or volunteer opportunities. This can be an Educator/staff/MGV. A county can have more than one person in Salesforce for an extra fee. (Salesforce/HOC)
- MGV Admin** - A person who oversees the MGVI program at the state level (Pam and Jen). (Salesforce/HOC)

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<https://osucfaes.my.salesforce.com/> (shibboleth name.#)

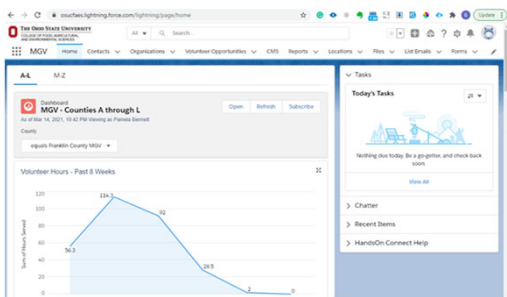
- Go to the link, log in using your name.#
  - Only those users who have been identified in each county will be able to get into Salesforce (can be Educator, Staff, designee, more than one (extra cost)).
  - These people have a user platform that costs per person



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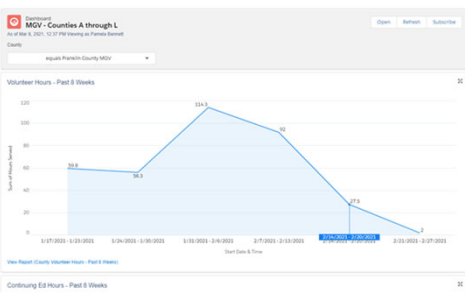
county coordinator - MGV



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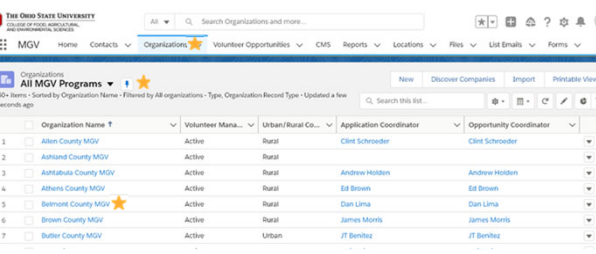
county coordinator - view the dashboard – show other dashboard functions



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county coordinator - browse to county (organizations)



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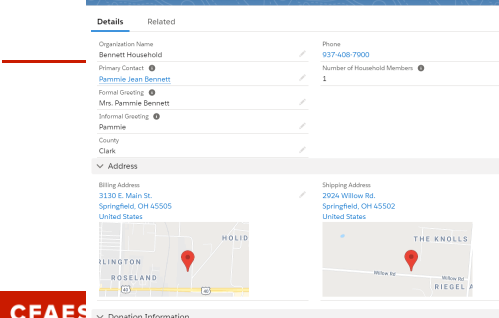
Organization (County, household, MGV home)

- Household - Details
  - Find your household
    - Edit your household information
- Under household
  - Basic information
  - Donation information
  - Donation totals
  - Membership Information
    - Could be used to track dues, or perhaps we figure a way to collect state support fees???

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Organization: Bennett Household



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## Organization (County)

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- Details
  - Edit your county details
    - Organization information
      - Don't change urban rural without talking to Pam/Jen
      - Don't change OSU Extension area
      - Organization record – remains non-profit
        - There will be records that might be business/household
      - Add EIN (either OSU or your MGVs)
      - Add your hours if not correct
      - Keep MGV program year
      - Parent Organization is OSU CFAES

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## Organization (County)

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- Primary Volunteer Contact - the primary contact over the entire county
- Opportunity Coordinator County Coordinator, manages volunteers and /or volunteer opportunities
- Application Coordinator the person who would be notified and take action when a new MGV applicant has applied
- Address
- Phone
- Mission Statement

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## Organization (County)

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- Designate How Volunteer Opportunities .....
  - Check auto approve unless you want to approve all opportunities (projects)
  - If you do, add the Opportunity (project) Approval Manager
- Focus of Service
  - All genders
  - All age groups
  - Populations ignore for now
  - Impact area ignore for now
  - Organizational needs ignore for now
  - County at bottom should be your county

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**MUST HIT SAVE FOR  
CHANGES TO TAKE  
EFFECT!!!**

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