JH Outback
Volunteer Salesforce Training Guide

Thank you for volunteering with us!
We launched a new registration system August of 2023 and we have created login and Salesforce instructions below.
If you have any questions, please reach out to us at info@jhoutback.com, I would be more than happy to help you get set up.
Once I receive the Roster from your city's leadership team, I will reach out to you with your city's login information, based on what role you are serving in. If you are ahead of the game and want to get into Salesforce before I receive the roster/you know you will be serving in a specific role ahead of time, please reach out and we can get you set-up when you are ready.

Logging into Salesforce

1. Login to Salesforce.
2. Once you log in you should see your **Dashboard** with pre-selected reports we have created for your city.
3. **If you login and do not see this, select the nine dots** (also known as the app launcher) in the top left hand corner, and **select Events Admin**. Then you should see your Dashboard now. You can look through these report titles and figure out which information you are looking for, based on your role.
4. Each Salesforce account is synced with a Gmail account that will receive copies of registration confirmation emails that the guest and volunteers receive. You are free to use these gmail accounts for exchanges and communications with your team and guests, but they will also be where you can keep up with new registrations.
5. These accounts will be shared and passed on throughout each season, so please don't add your personal phone number to it or change the password.
6. Upon your first logging into Salesforce, it may ask you to verify your identity. It will send a code to the gmail account associated with the Salesforce account. You will log into the gmail account, and it is the same username as your Salesforce account and I will send you the Gmail password when we get your logging information. You will log into the gmail account and retrieve the code it sends you into the Salesforce verification alert that pops up when you login to Salesforce. This is a one time thing for you to just verify your identity. After this first verification, you won't have to do this again with gmail.

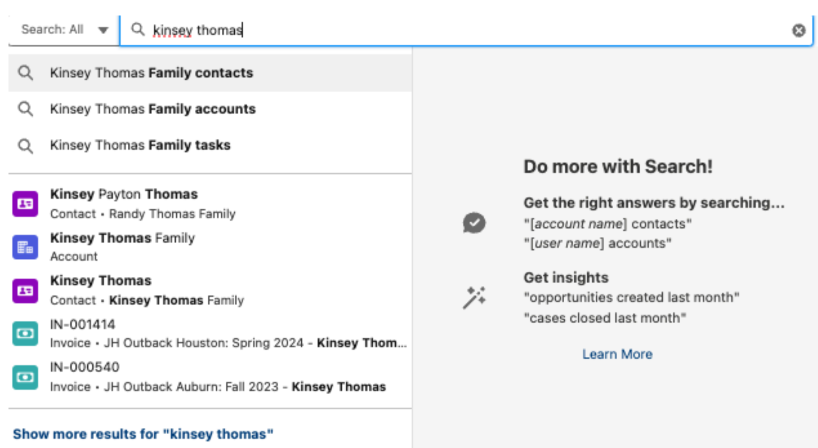
Helpful Notes on Reports and Dashboards:

-If you click into the hyperlink at the bottom of the chart for any of the reports, it will expand into full screen and you can see your chosen report.
-If you want to export, click the arrow next to the edit button on the top right hand corner, and a drop down menu will appear with "export" as an option. You can select your export preferences and send the document as you wish.
-If you click edit in the top right hand corner, you can choose to make changes to the report. If you want to see less/different fields in a report, simply delete/add the field from the left hand side of the screen where the fields are listed out. (***You are welcome to shoot me an email/text with report changes as you wish and I can quickly make you any report you want and add it to your dashboard.)
-There is a function called "In-field Editing" that will allow you to edit a field from a report. You can see this button called "Enable In-field Editing" in the top right hand corner of a full screen report. This is very helpful in making small changes or additions to registrations instead of having to make several clicks to find an attendee record and edit it there. You will notice some fields have a lock symbol on it, this is just because of certain permissions to limit editing, so those you will not be able to edit but for most fields, you can.

For **Attendee Records:**
-When someone registers an "attendee record" is created for them. It will appear as a hyperlink on your reports like this for example: [AT-12345] and you can click into this and it will take you to a page that displays all of their answers from their registration process.
-From there, you can change their registration status, cancel their event, review any answer from their registration, and more. See the best practices section for more information.

For **Searching Someone's Name:**
-In the top of the screen you will see a search bar. You can search for anyone by starting to type in their name and there will be a drop-down menu. You will see phrasing like "Contacts" and "Accounts," you can view the screenshot below.

-If I click the "Account" one, it will take me to my family account, which will tell me more about past attendance, my family members, etc.
-If I click on the "Contact" one, it will take me to my personal contact page with my contact info, home address, etc.



Reporting Explanation and Instructions

It is important that the Registration Team Lead is reviewing and sharing reports with other Team Leaders as well as your own Registration Team. You will be responsible for all portions of the section so it's important that you read thoroughly. You can delegate as much or as little to your team of volunteers. We recommend them helping you contact those with special needs if there is a long list, with follow ups on unpaid registration fees, and creating teams.

<u>Explanation of Different Reports and Responsibilities-</u>
Note: All reports are pre-built out for you and on your dashboard. If you login and begin to see changes or customization opportunities with your reports, please reach out and we can do a one on one with you and/or your team and make your reports how you like.

1. **Guest Attendee Report:** This is a comprehensive report that shows all guest information that they input during the registration process. Please do not share this list with a broad audience as it contains guests' private information. This report is used for detailed guest information/special needs/contact information/finances.
- This is the report that seems to be used most often. It is a summary report that includes basic Guest information and should be sent regularly to update the Lay Leader, Assistant Lay Leader, Prayer Team Leader, and any others interested in receiving (suggest you ask all Team Leaders if they want to be included).
-Begin pulling at least 5 Weeks in advance, converting to an Excel file, and distributing to the appropriate Team Leaders at least Weekly, and print copies to have available at the Weekly Meetings for prayer. You will likely pull and disseminate this report more frequently in the last two weeks as Team Leaders will need current information.
-Begin pulling this Report Weekly at least 5 weeks in advance, increasing frequency as registration volume increases.
-Contact Guests who list Special Needs to understand their needs, ensure that we can accommodate them, and provide these special needs to any other appropriate Team Leader.

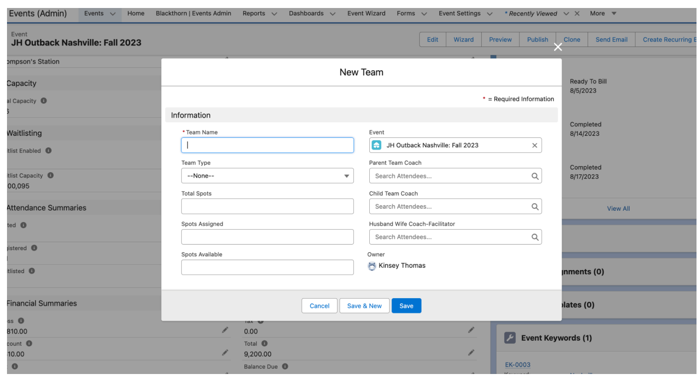
2. **Balance Due Report:** used to collect Guest fees and sponsorship fees.
-Begin pulling this report 3-4 Weeks in advance to make sure everyone has paid, see who has been sponsored and follow up with any listed sponsors for payment, and see who has requested sponsorship. See the Best Practices document for more instruction on requesting a sponsorship.

3. **Volunteer Attendee Report:** This is a report that you will work with the Coach Team Lead to develop starting at least two weeks prior. For extra support on this project, reach out to your team members who are available to help with this process. Once you have a good feel for your teams, use this report to create your lodging/tent assignments. It's important to coordinate with the Volunteer Lead when placing guests in their housing accommodations. The Volunteer Lead will

be the point person in charge of housing the volunteers and you want to make sure it's clear where the guests will be housed vs. the volunteers.

4. **Arrival Report:** This report will be used Friday of the Event to check Guests in as they arrive. Most cities use a modified version of the Team Report or the Registration Report. The key information that you will want available for check in can vary by city but typically includes: Everything from the Guest Attendee Report, balance due, Release forms due (if relevant), Special Needs, and any other relevant notes. **Please reach out to me if you need assistance building this report, as this is super customizable.**

Building Teams In Salesforce



Historically, creating teams has been a potentially time-consuming task, and as guests are canceling/transferring, it can be a lot to keep up with.
We have a new process that will be very helpful!

Creating Teams from the Event:
-Click the events tab, find your upcoming event, and click into it.
-Scroll down and in the right hand column, find the tab called "Teams" and click New.
-From this pop up window, create the teams for your event based on your max capacity and anticipated attendance. You can title them, for example, "Team 1-Father/Daughter" or "Green Goblin's- Husband/Wife" or whatever labels are easiest for you. You are free to add in information like coaches or spots available in the team, if you know that information, but if not, you can skip those fields. From here save, and repeat until you have created all the teams for your event.

Adding Registered Guests to the Teams You Created:
-You will then go back to your dashboard, and click into the Guest Attendee Report.
-Click "enable in-field editing" from the top right hand corner
-Find the column that says Team Assignment
-If you double click the pencil symbol that pops up when you hover over a field, it will let you edit that field.
-From there you can search through your attendees, look at their age and gender of the child attending, and assign them to a team you created from a picklist that pops up.

This is very helpful as you will no longer have to create an external document for team building that you have to update when a guest cancels or transfers. You have the freedom to move guests around easily as the numbers for your event changes.

Payments and Sponsorships Best Practices

Context:

-When a guest or volunteer registers, they are required to pay in full upon registration.
-If someone requests a sponsor or selects that they have a sponsor, it will zero out their balance and they can checkout without paying with a provided discount code with their selection.
-One task of the registration lead is to keep track of people who request a sponsor and approve these requests once a guest is matched with a sponsor/donation.
-You will refer to the report on your dashboard that is called "Balance Due-Guests" for this information. It lists out each guest's payment method, balance paid/balance due, sponsor, etc. and filters out guests once they pay in full, that way you are only seeing guests listed with balance due.
-**Another easy way to keep up with guests who request or have a sponsor, is in the registration confirmation email that you will receive, there is a field that says their payment method and sponsor's name and contact information, if applicable. You can see these emails come in and you can either make a note or immediately take some action steps to match them with a sponsor or follow up with the mentioned sponsor.
-When you see a guest register and request a sponsorship, you can reach out to those within your JH Outback community who typically sponsor guests and see if there is anyone who can give to this couple.

Once you match a guest with a sponsorship:

1. Email the guest and let them know they were approved.
2. Send your city specific Raise Donors Link from our website to the sponsor and have them give it online and notate the guests name in the comments of the donation. Sponsors can also pay locally with a check/cash but it is important to follow up with them about paying and sending the link immediately is a great practice.
3. Send me an email that says, for example, "John Doe is sponsoring Katie and Sue Smith" as it is very important we keep track of specific sponsorships for tax purposes. I receive a copy of donations made through Raise Donors and I will zero out the balance on the guest's invoice when I receive the payment.

If someone selects that <u>they already have a sponsor,</u> it is also important that this sponsor is sent the Raise Donors link. In this Balance Due-Guests report, there is a column that says the sponsor's name and email, and you will need to send them the link to their email.

-With these practices in place, you will not have to take payment at arrival from guests.
-After an event, I will export the balance due report and send you a list of everyone with a balance and you can let me know if a guest or sponsor paid on site and I can zero out their balance. If there are still those with a balance, I will send an electronic invoice with a link to pay online to the guest.

Cancellations and Transfers Best Practices

If someone communicates to you that they are canceling or would like to transfer to your next event, you have the capability to make that change in Salesforce. You are more than welcome to send me an email or text when there is a cancellation or transfer and I can assist but I wanted to show you that you have this capability too!

We want to refine this process, as these changes being communicated to you prior to a week or two from the weekend, can be strenuous and a lot to keep up with. Feel free to direct guests to communicating with me or to email info@jhoutback.com with any questions or changes to their registration.

Note: 7 days or less out from an event, the registration fee is non-refundable, though it is transferable to another event/city. Though, if your city would like to approve refunds within this time frame on a case by case basis, that is up to your leadership team.

If someone wants to transfer:

1. Search their name in the search bar at the top of your screen and select their account
2. Select "attendees" and find the event they are registered for that you want to change. This will open up their Attendee Record
3. Double click the field that lists the event name. This will allow you to edit
4. Click the X on the right of the event name and type in the new event name, for example, "Birmingham Spring 2024" and that event will pull up in a drop down menu. Select the event you want to transfer them to
5. In the Event Item column, click the X and type in the same event item they are currently registered for, which is listed above the event name field (Event Items examples are parent, child, volunteer, etc.) This just registers them as the right attendee in this new event you are transferring them to
6. Save
7. ***Type in the other attendee, and repeat for the other individual in the pair, this is very important!

If someone wants to cancel:

1. Search their name in the search bar at the top of your screen and select their account
2. Select “attendees” and find the event they are registered for that you want to change. This will open up their Attendee Record
3. Double click the registration status and change it from registered to canceled
4. Save
5. ***Type in the other attendee, and repeat for the other individual in the pair, this is very important!