Volunteer Portal: A Brief How To

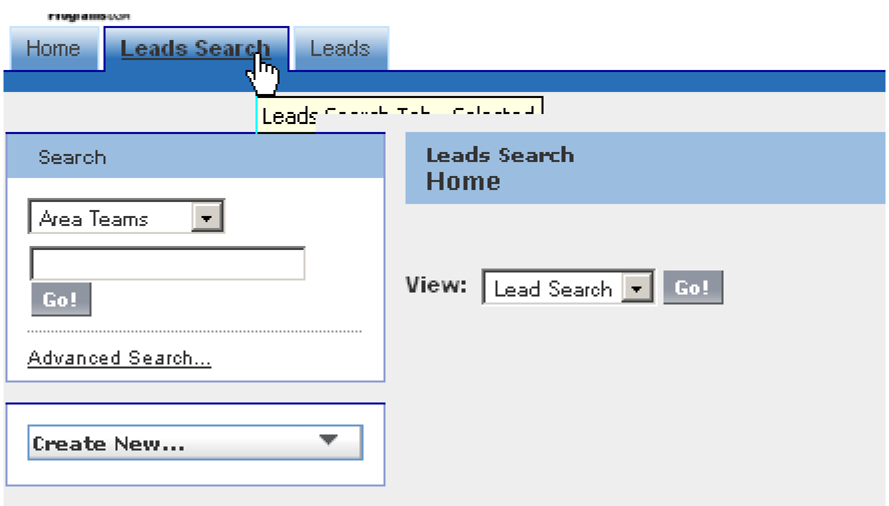
The Volunteer Portal was designed as a tool for volunteers. In it they have the ability to manage their leads, create leads, contact leads, manage tasks, as well as create them. Although this has not been streamlined as of yet, it is a viable and functional option for Volunteers, even in its current state of being “under construction.”

This document covers the absolute basics of the Volunteer portal, which includes managing leads, statuses, and editing leads. Although this does not cover the entire range of what is possible in the portal, it does provide volunteers with the basic knowledge of how to use it until a more formal training can be established.

Managing Leads:

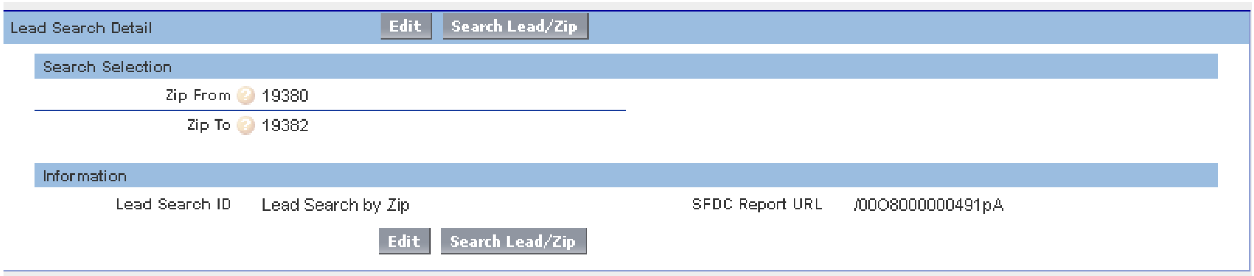
Now that Area Teams have been established, new and better ways for volunteers to manage their leads is on the way, but for now there two basic report functions.

- **Lead Search**: The lead search is the Volunteer version of reports. Although they do not have the ability to create their own custom reports, open ended reports can be created for them. This allows the volunteers freedom to choose the criteria they would like to pull the students by. However, it is in the constraint of the options available to them, which are currently limited.



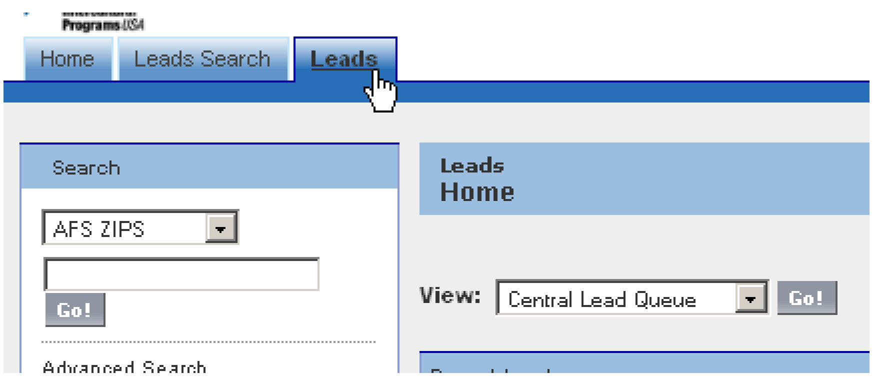
To access the Lead Search, click the “Lead Search” Tab, and then click the “Go!” button with the view set to “Lead Search.” This will take you to the search options. Currently, there are only two options, “Lead Search by Zip” and “Lead Search by High School and State.” More Lead Search functions are on the way, including an Area Team Search.

Each Search option will allow you to enter search criteria based off of the available search options. For example, the zip code search allows you to enter in a zip code range of your choosing to pull a list of leads that fall into that range.



In order to run the search, click “Edit” and enter your search parameters. For the searches to work properly, please only enter and edit data under the **Search Selection** header. Once the data has been entered, which in this case is a zip code range, click “Save,” then “Search Lead/Zip.” This is the same process for the “Lead Search by High School and State” option, except instead of zip codes, you would enter in any part of the desired high school’s name and the state that the high school is in.

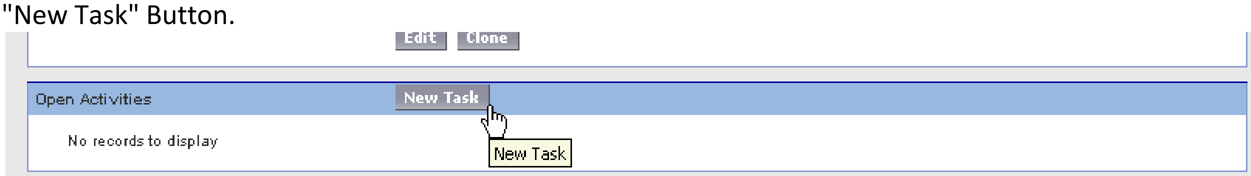
Outside of the Lead Search, there is also the ability to create custom views for the volunteers. On top of the custom Volunteer Views, they will also have access to all staff views that are open to public view.



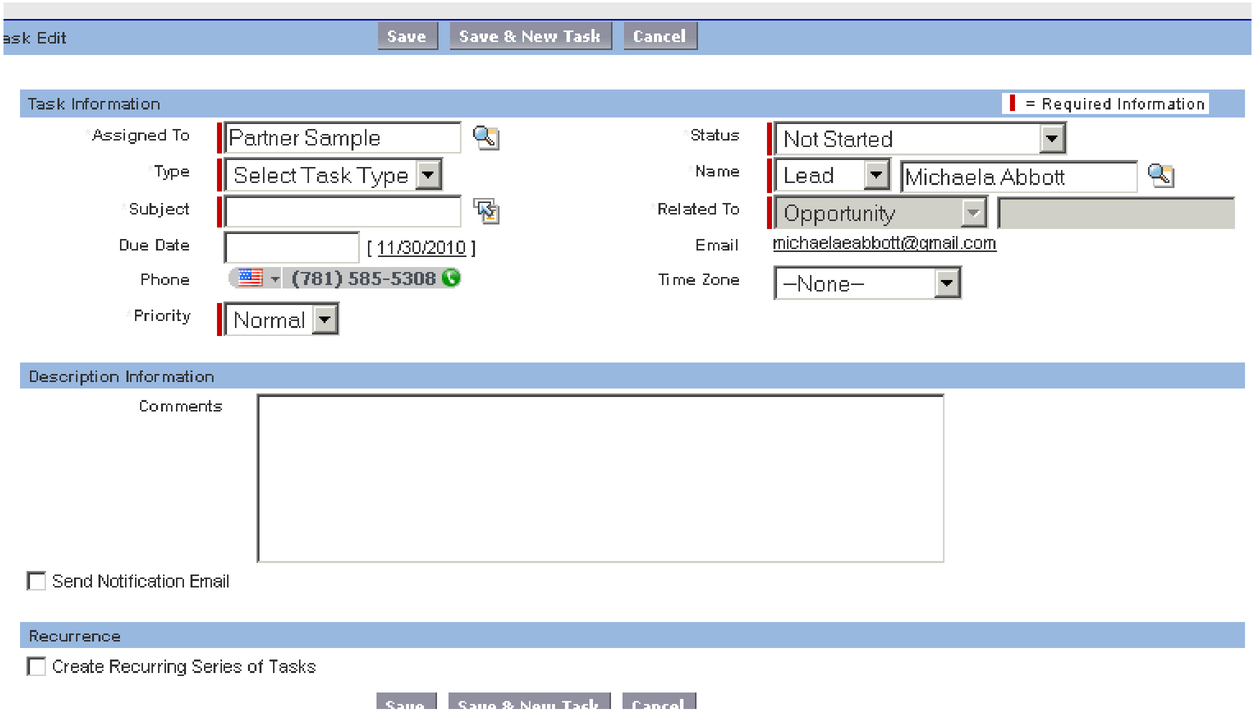
To access the Lead views click on the “Leads” tab. The views are listed next to “View.” The only time the “Go!” button is needed with views is when the “Leads” tab is first opened and the desired view has already been selected. Each selected view has its own criteria in which leads are pulled. These criteria cannot be modified by volunteers, but can be modified by staff. It is also important to note that volunteers will not be able to view leads associated with campaigns at this point. This is currently being worked on.

- **Tasks and Activity History:** Tasks are used as a means of managing lead contacts as well as a means of recording helpful insights.

In order to create a task, scroll down to the "Open Activities" section on a student's individual lead page, and click the "New Task" Button.



Once you click the “New Task” button, you will be taken to the editable task page.

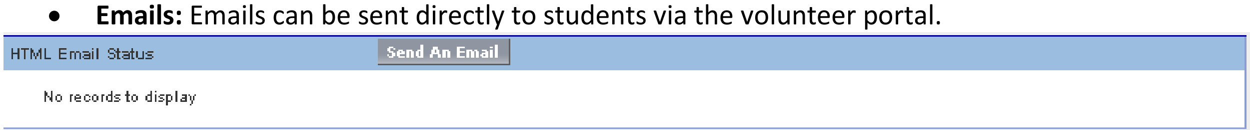


There are only a few fields to be concerned with for now, "Type," "Subject," "Comments," and "Due Date."

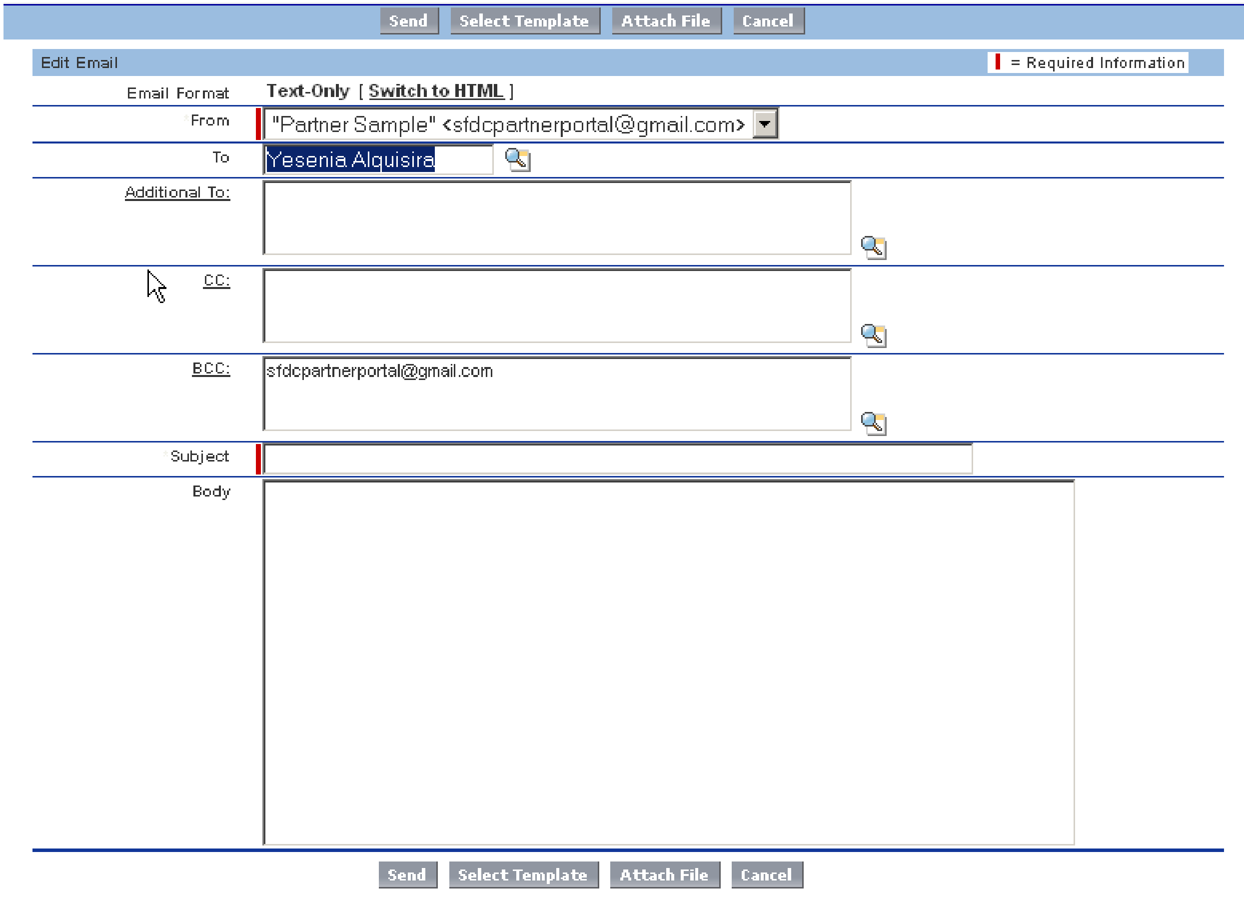
- **Type:** Type is used to denote the type of contact that was planned. The types are pre-set on a drop down menu, so the type chosen should best reflect the type of contact planned.
- **Subject:** There are two options with subject. You can directly fill in your own subject, or choose from pre-set subjects by clicking on the filter button to the right of the "Subject" field.
- **Comments:** The comments section is where you leave any notes to yourself about the contact. It can also be dually used to denote any pertinent information from the contact with the student.
- **Due Date:** Due date is the date in which the task is intended to be completed by.

Underneath the "Open Activities" section on the lead is the "Activity History" section. This works the same as tasks, but is used to denote contacts that have already happened, or for any comments on the file in general. The caveat to Activity history is that it also offers the ability to create a follow-up task for the lead.

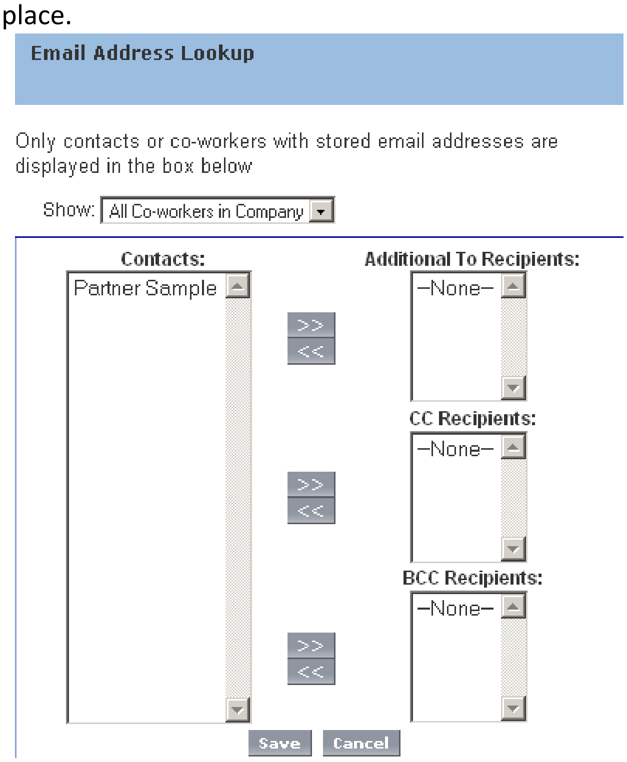
- **Emails:** Emails can be sent directly to students via the volunteer portal.



In order to send an email through the Volunteer Portal, click "Send an Email" under the HTML Email Status section on the lead. This will take you to a basic email setup.



The basic email will allow you to send a custom email (in both text based and HTML), attach a file, and CC/BCC other email addresses. CC/BCC addresses can be entered in multiples separated by a comma. The other option is click the magnifying glass to the right of either “Additional To,” “CC,” or “BCC.” All three of the magnifying glass buttons will take you to the same place.

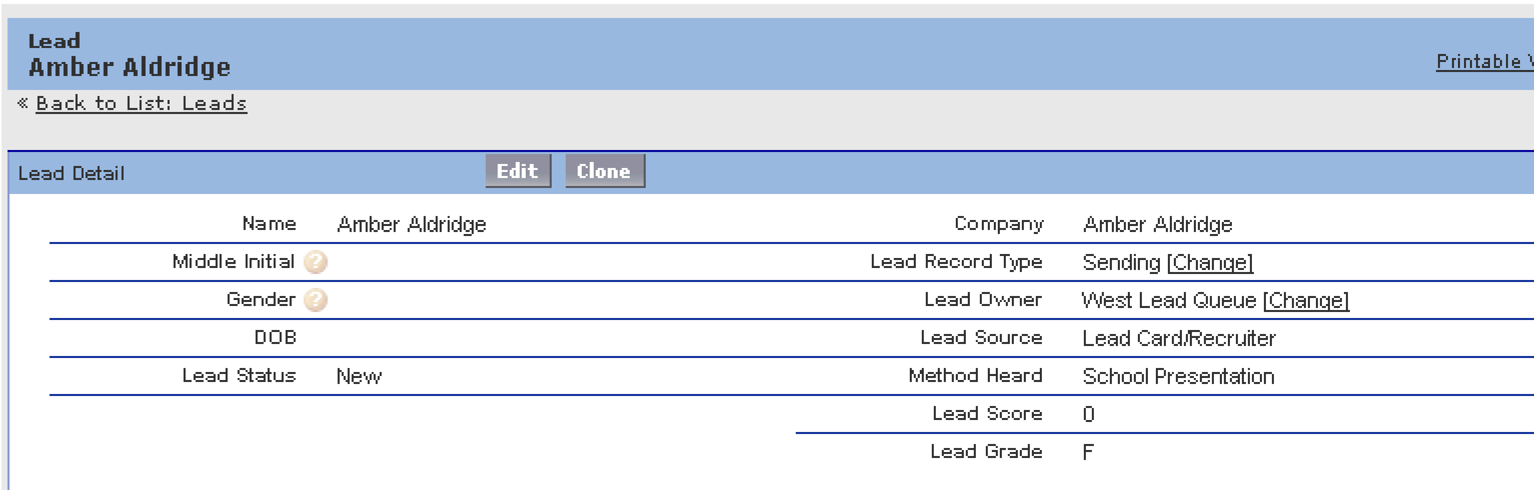


This is used to CC other partners in the Portal. If staff or anyone else needs to be notified, type out the email addresses separating multiples by a comma, as was discussed earlier in this document.

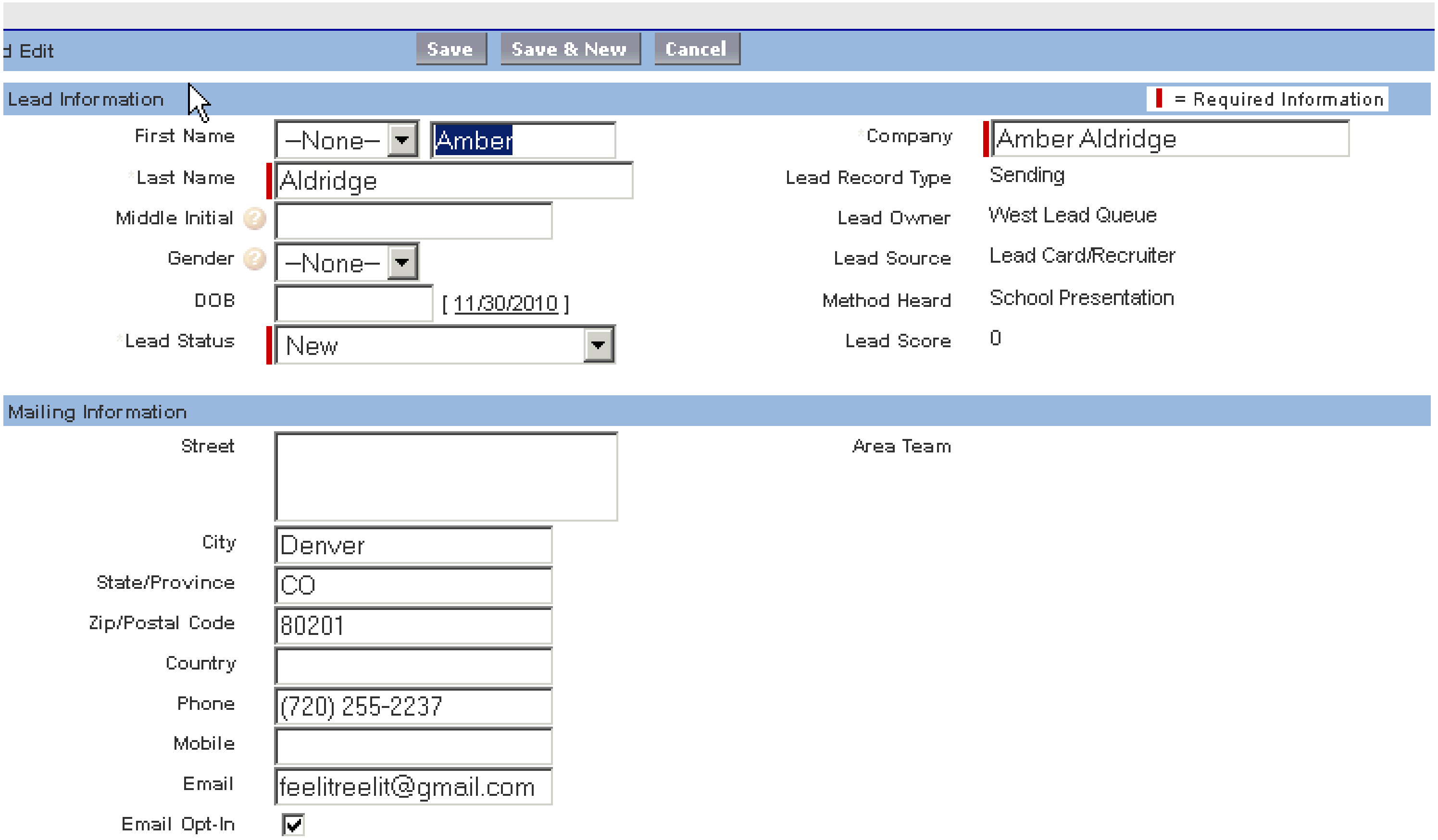
- **Statuses:** The status currently are not optimized for use in the portal as well as the general Salesforce site. The only statuses that are really plausible for current use are "New," "Closed - Not Reached," "Closed - Not Interested," and "Email Only." Please **do not** use the “Closed – Converted” status as it is for internal use only.
    - "New" is the standard, default status to denote leads that have recently come in.
    - "Closed - Not Reached" is for students that cannot be reached by any means, which is generally used after two to three attempted contacts with no response.
    - "Closed - Not Interested" is for students that do not wish to go on an abroad program.
    - "Email Only" is for students who only wish to have email contact.

Editing Leads

You currently do have the ability to edit leads with the given log in information. At the top of each lead page (this is the page that comes up when you click on a student's name from any of the searches or views), there are two buttons, "Edit" and "Clone."



Clicking "Edit" will open the page up for editing the information. Once it is clicked, it will look like this:



d Edit

Save | Save & New | Cancel

Lead Information

= Required Information

First Name	–None– Amber	Company	Amber Aldridge
Last Name	Aldridge	Lead Record Type	Sending
Middle Initial		Lead Owner	West Lead Queue
Gender	–None–	Lead Source	Lead Card/Recruiter
DOB	[11/30/2010]	Method Heard	School Presentation
Lead Status	New	Lead Score	0

Mailing Information

Street		Area Team	
City	Denver		
State/Province	CO		
Zip/Postal Code	80201		
Country			
Phone	(720) 255-2237		
Mobile			
Email	feelitreelit@gmail.com		
Email Opt-In	☑		

Everything with an open text box is editable. From here, you have three options. There will be three buttons on the top of the page. "Save," "Save & New," and "Cancel." Clicking "Save" will save whatever information was updated and return you to the general lead view of the specific record you were working on. "Save & New" will save the updated information on the lead you were working on and direct you to creating a new lead as well. "Cancel" will cancel any changes and return you to the general view of the specific lead being worked on.

Clicking "Clone" will create an identical lead to the one being viewed (this can be canceled if the "Cancel" button is clicked before the new information is saved. This comes in handy when adding siblings or any other situation where there is a good amount of identical information.