NAZA

NASHVILLE AFTER ZONE ALLIANCE

# SALESFORCE OPERATIONS MANUAL

# Contents

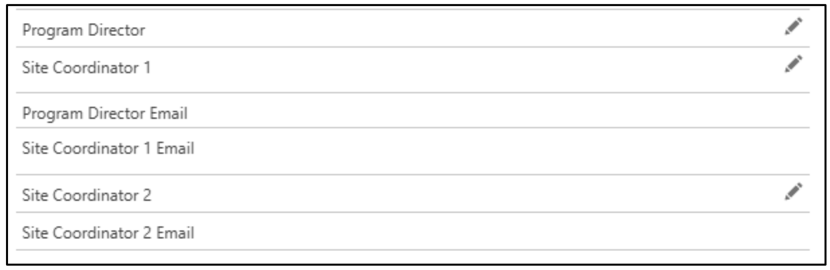
# What is Salesforce?

NAZA uses the date management system, Salesforce, allowing Partners to capture a snapshot of the experiences youth gain while participating in NAZA funded and affiliated programs.

Salesforce captures more than just student attendance! Partners also can:

- View programming dashboards
- View professional development attendance
- Record session activities
- Seamless integration of the NAZA online application
- Assign tasks and communicate with your site coordinators
- Log communications

Individuals can gain a Salesforce license (official account) or simply have contact listed in the data system. Those with a license (account) would have the ability to make updates to various aspects of youth and program information based on their Salesforce designation (shown below).




*Note: Staffers with at least 45 days of inactivity are subject to deactivation of their license.*

# Creating Staff & Youth Contacts

Staff and Youth contacts are the foundation of maintaining Salesforce records for both groups. Creating contacts for staff is best used for those working at any programming site or is designated as Salesforce administrator at their organization. NAZA recommends everyone working at a program site has a Salesforce contact and is properly listed on their corresponding program page, even if they do not have an official Salesforce license.

Salesforce contacts collect and maintain several points of information.

For staff, the contact information maintains:

- Contact information (email, phone, etc.
- Title
- Account Name (Organization)
- Training Activity

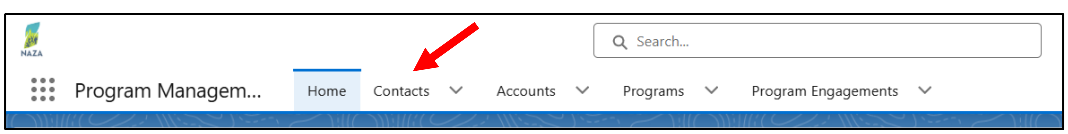
Youth contacts information collects the records:

- Program Engagement
- Applications
- Attendance

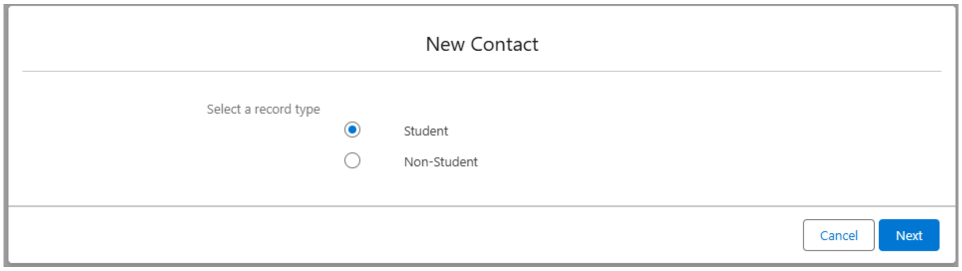
Youth contact creation is mainly in correspondence with the reception of a paper-application.

Partners have the ability to create contacts for staff and students. Individuals with the proper permissions can create a staff contact for all the individuals working at a program site. To create either staff or youth contacts please go through the following steps:

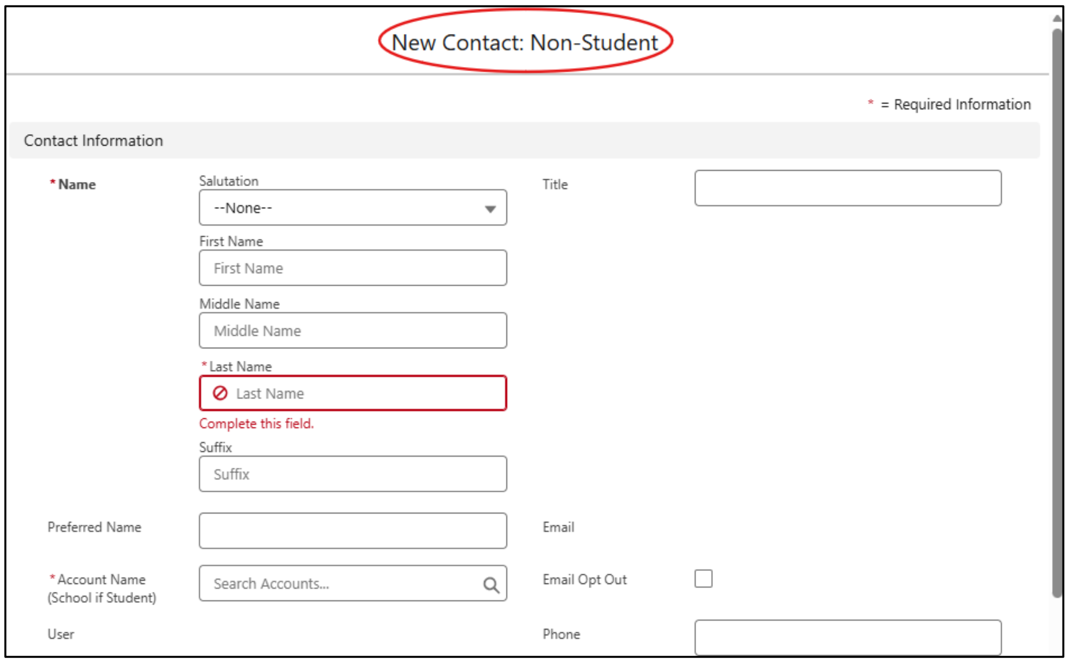
1. Click on "Contacts" on home page.

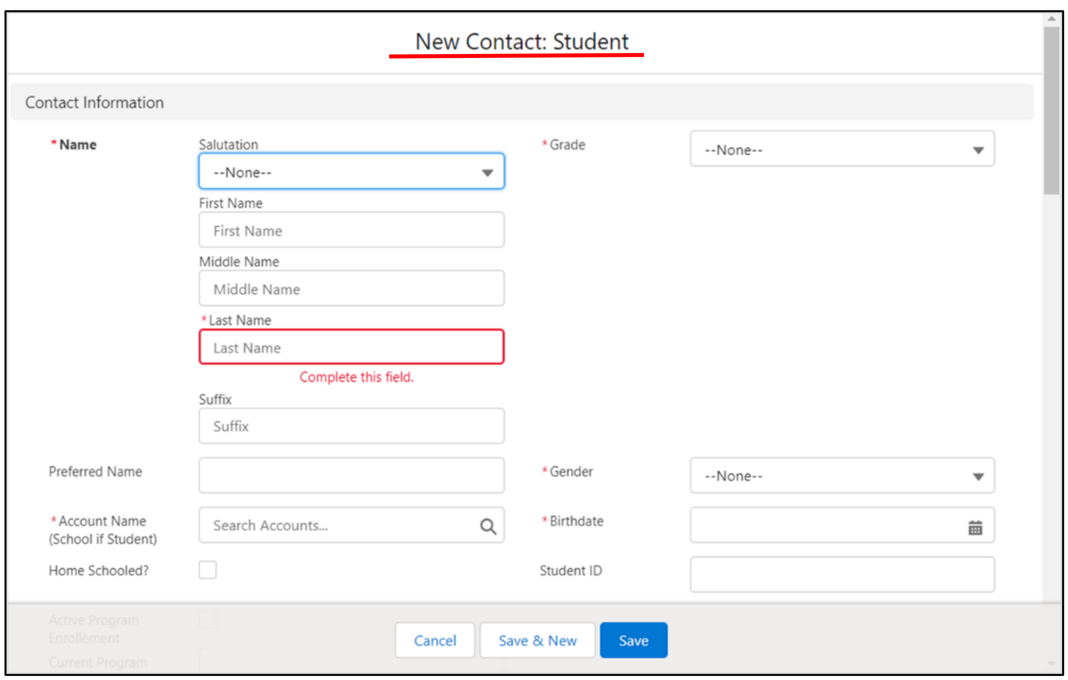



2. Based on individual, choose student or non-student (staff)




a. Both choices ask for similar information. When it's a student, please enter all the information included in the paper application received from student or parent



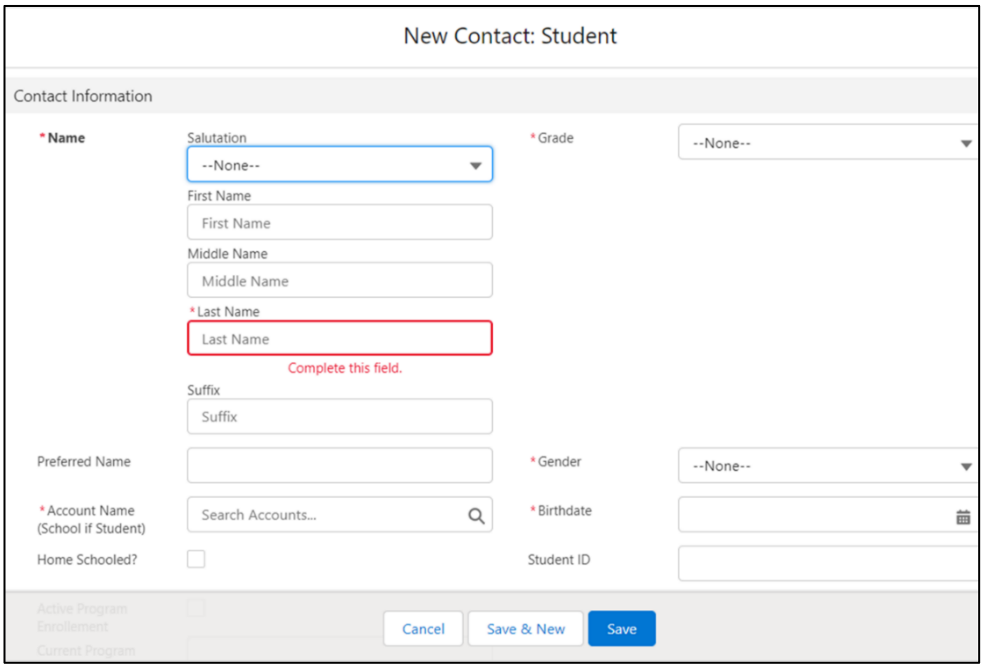



## Paper Application Process

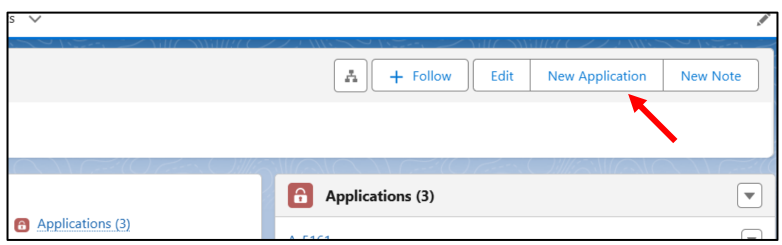
There are numerous Partners still distributing and receiving paper applications. When receiving paper application there is a recommended process an organization must follow. Unlike the online application, student contact information is must be found or created to complete the Salesforce application process.

Steps to Complete the Paper Application Process

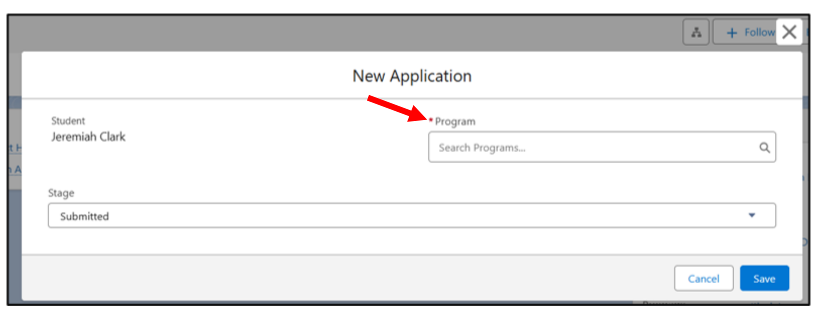
- Search for YOUTH Contact FIRST
    - If it does not exist, Create the Contact with student's application info
        - Select "Contact"
        - Select "New"
        - Select Student
        - Enter Information Completely
        - Account if Student:
            - Add school student attends
    - "Save" or "Save & New"

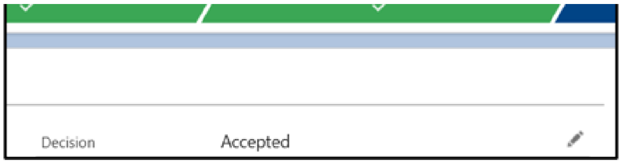



- Create a New Application from existing youth contact
    1. All information is required
    2. On Student Contact Page Select "New Application"

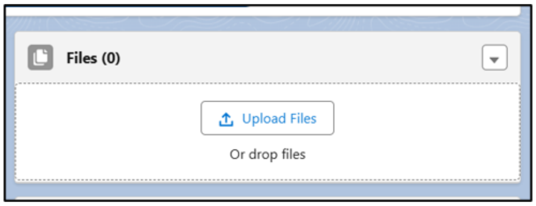



3. Select "Program"
4. Select Staging Process
5. Review Application Info
6. *Check the "Permission Form Signed" box*






7. Make Decision (Accept, Decline or Hold)




8. Save

*9. Upload the hard copy of the application under "Files"*

## Accepting Online Application

Partners will be notified when parents submit an online application specific to a given location. This is a two-step process for the parent/guardian. The parent/guardian will complete the application and then a permission form (Table 1) will be e-mailed to the parent to sign. The application is considered completed once the parent has signed the permission form.

Steps to Accept an Online Application

- Select your program
- Select "Related"
- Select the "Application Name" e.g. *A-xxxxx*
- Review all of the information
  - The "Permission Form Signature" hyperlink must be present before accepting the student
    - You may resend the form by copy & pasting the hyperlink next to "Permission Form"
- Select the pencil next to "Decision" and select one of the following options
  - Accepted: Enrolled into the program
  - Hold: Information will be held in the system for 30 days until another decision is made
  - Denied: Not allowed to participate within the program
    - The parent will receive a notification e-mail upon your decision.

**Visuals of process can be seen in the Paper Application process*

## Program Engagements

Program Engagements provides the user with the opportunity to view the student program enrollment history over the course of the year or years. Parents may apply for multiple programs through the online application. Exploring the student program engagement will allow you to see if the student has already enrolled into another program.

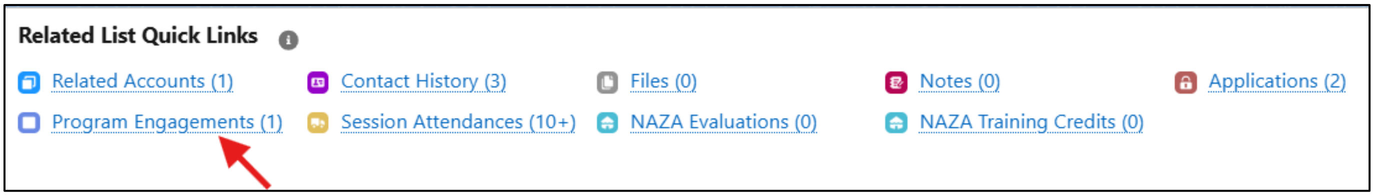
Parents may enroll their students into another program by accident through the online application. You may view the program engagement by searching for the student, by name, and review their contact profile. Their program engagement will allow you to see which program and program staff to contact in order to release the student so the user may enroll the student into the correct program.

Here are few details staff should remember about Program Engagement:

- Program engagement (PE) = Enrolling Youth
- Program Staff need to review or create
- Online applications automatically creates engagement
- Adds youth to attendance role
- Content found within Program Engagements
  - Start and End Date
  - Days Attended
  - Session Attendance
  - Active Enrollment
- Only Program Owners can make PE edits
- ***Please add PE before collected attendance***

**Creating Program Engagement**

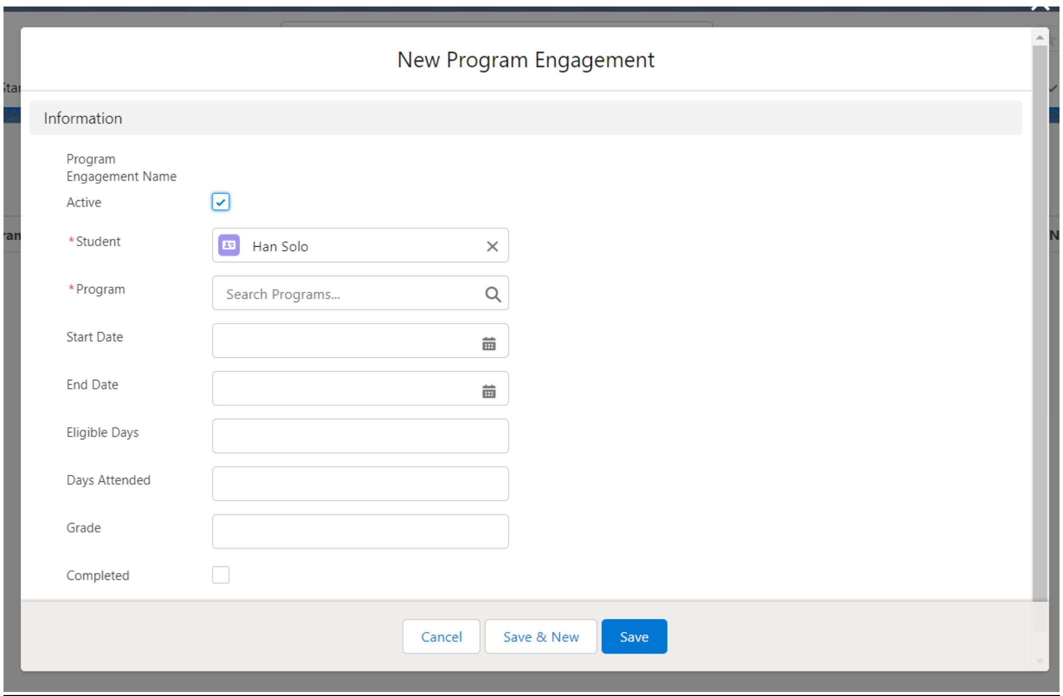
Step 1: Go to youth contact page and click on "Program Engagement"




Step 2: Enter Youth information. This includes

a. Program Name
b. Start Date
c. Grade

**Note: Eligible days and days attended will generate as you collect attendance data*




*Program Engagement Best Practices & FAQ:*

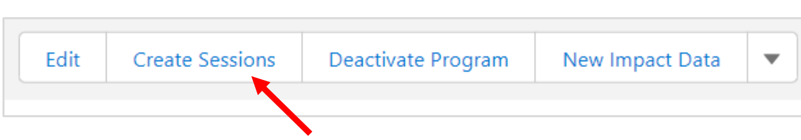
- Add Engagement when youth is accepted into program (before attending)
- If youth are not showing on attendance roll, they do not have PE
- Do not end program engagement until you know youth are no longer attending your program
- Only Salesforce Admin can edit PE end date

## Creating Program Session Dates

Sessions are best described as an organization's program day. Sessions allow NAZA Partners to track their program attendance and curriculum activities. Organizations are able to create sessions either in bulk – per semester or per month – or one day at a time.

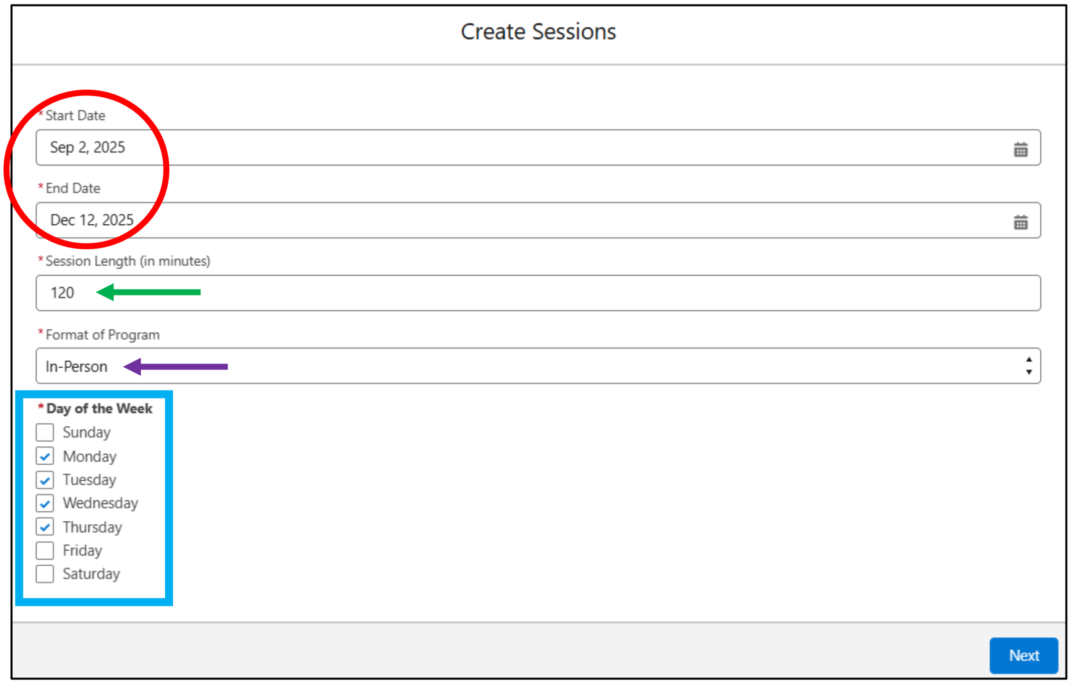
To begin the process of session creation Partners should:

- Look to upper right corner of program page
- Select "Create Sessions"



Once clicking “Create Sessions” Partners are able to begin the process of finalizing their session calendar. To generate sessions, staff must follow these steps:

Step 1: Select Start and End Date
*Note: Always use the dates the day before and after your program starts and ends*
Step 2: Length of time
Step 3: Session Format
Step 4: Days of the Week

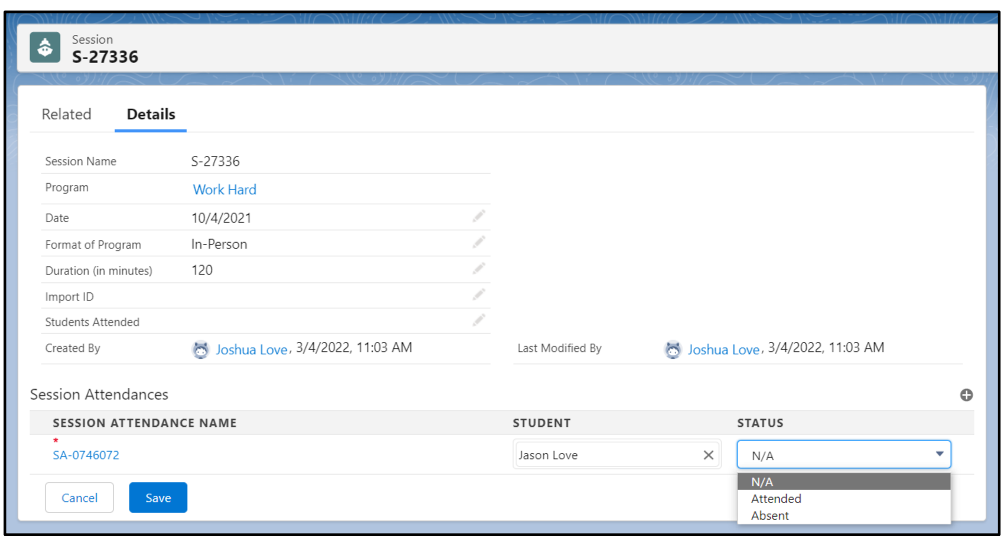



## Taking Attendance

Partners are required to update their student attendance record on a weekly basis through Salesforce in order to maintain compliance with the NAZA Memorandum of Understanding.

Steps to Taking Attendance

- Select your program
- Select a “Session Name”
- Select the pencil icon next to Session Attendances
- Change the Session Attendance Status for each student.
- Select “Save”



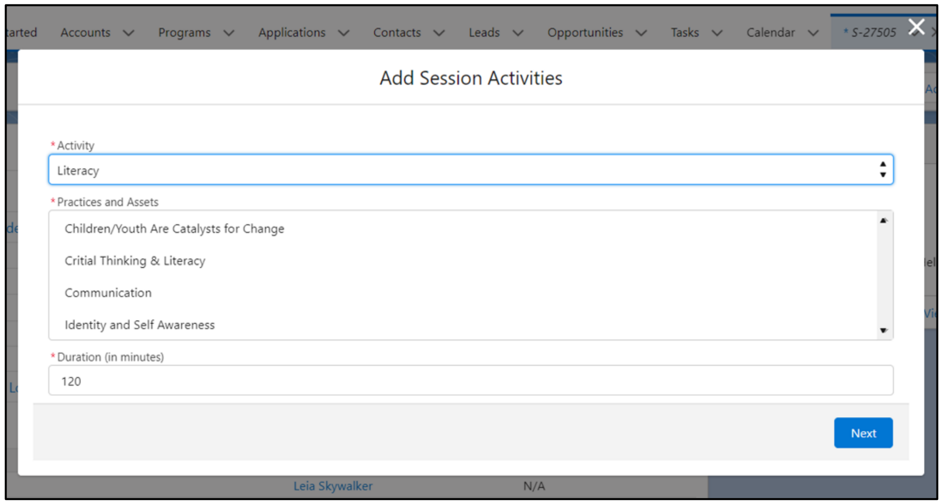

The attendance options are “Present,” “Absent,” and “N/A.” A “Present” or “Absent” status must be chosen for each student on a daily basis.

The only time you will utilize the “N/A” is when a student is participating in a school-related event, *e.g. sport, school play, etc.*

## Session Activities

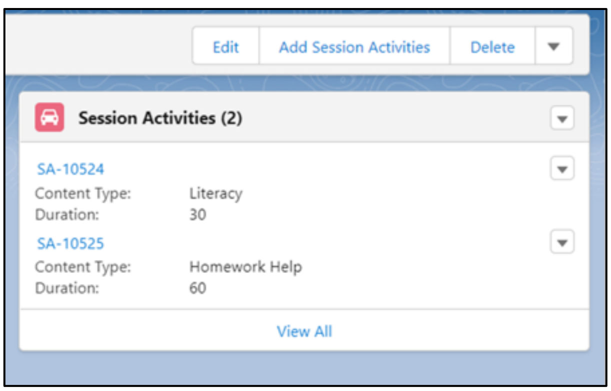
Session Activities provide data on the content focused on the *Vision for Holistic Youth Development*. This information addresses the activities, practices and assets that are addressed each daily session (curriculum plan). Session Activities consist of the following elements:

- Activity
- Practices and Assets
- Duration (in minutes)



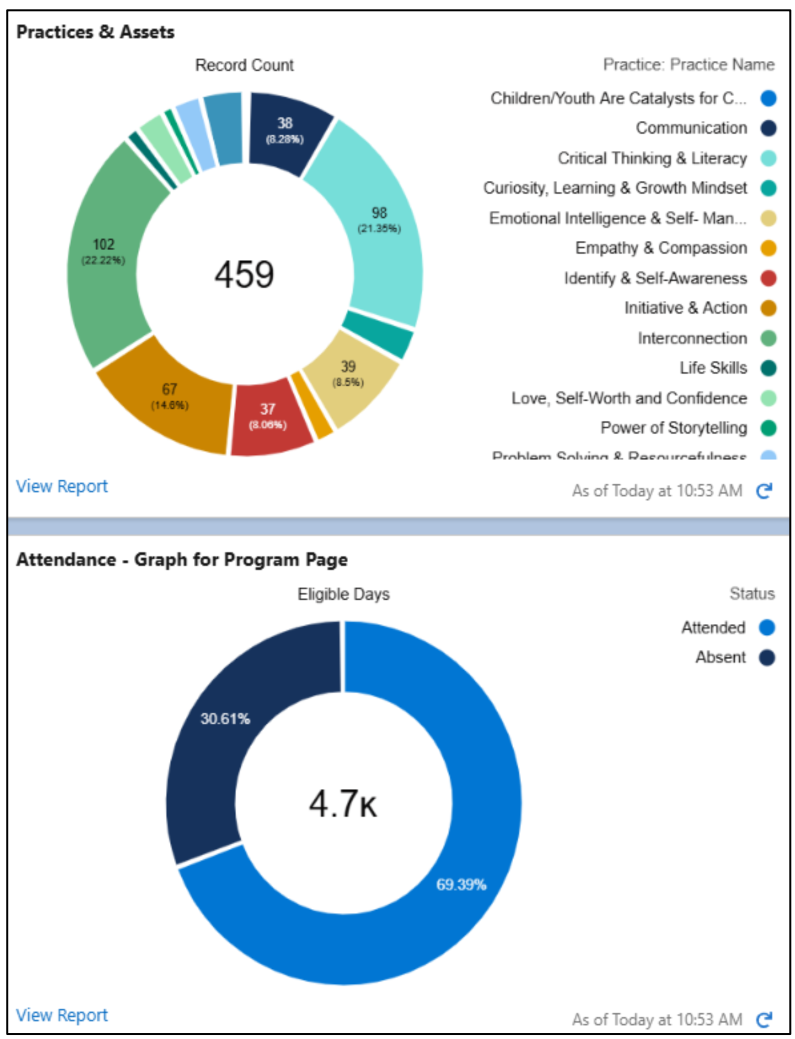

Adding Session Activities

- Select a "Session Name"
- Select "Add Session Activities"
    - To record multiple "Practices and Assets", hold the "Ctrl" button and click on as many "Practices and Assets"
- Enter the duration of the activity in minutes
- Select "Next" and "Save".




Completed Activities Example

After saving your chosen Activity and Practices & Assets, your information will display on Sessions Activities page, like the image to the right.




As you collect your information, the program page has two charts available providing data related to session activities; Session Activity Report by Content Area and Practices and Content and Attendance. The charts provide a record count of the content and practice & assets have been addressed throughout the programming year.

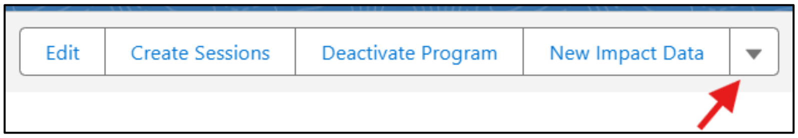
To receive an accurate account of your activities and attendance, the user is required to meet the minimum standard:

- Accurately record attendance
- Record at least one activity;
- record at least one content with amount of time (in minutes) focused on the content;
- and, record as many practice & assets that are related to the activity.

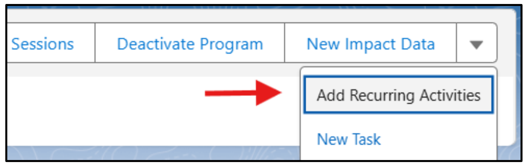
**<u>Adding Bulk Recurring Activities</u>**

*Use this option if you will focus on particular Activity & Practices and Assets over an extended period of time.*

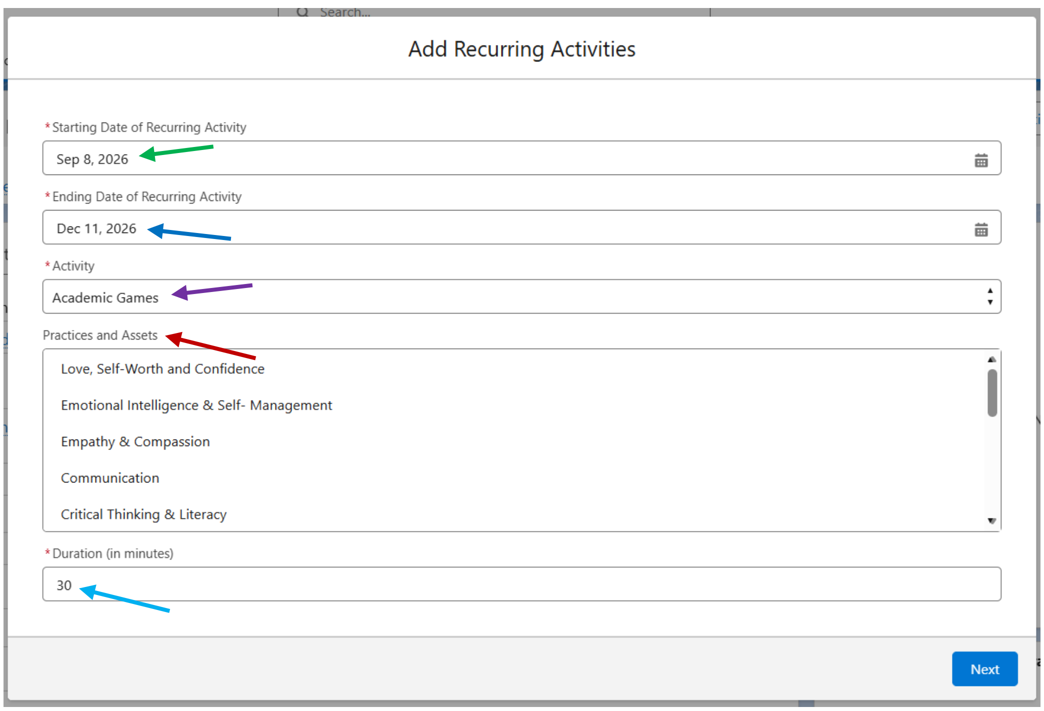
- (Program profile page) Select the arrow next to "Deactivate Program"




- Select "Add Recurring Activities"




Below is the pop-up screen after selecting Recurring Activities. Follow the steps to enter info:




- Select the date you will start the recurring activity.
- Select the day you will end the recurring activity.

*Note: Make sure to use the date before and after you start and end date*

- Select the Activity
- Select the Practices and Assets
- Include the duration of time in minutes.

*Enter the appropriate information in the data fields. You **<u>do not</u>** have to enter the information on the individual session dates if they are included in your range of dates.*

# Salesforce FAQs & Common Issues

- What happens if my student is no longer active with the program?
  *You will have to change the "Active Program Enrollment" status of the student.*

  **Flow: Contact> Select Student Name>Change the "Active Program Enrollment" status by "unchecking" the box> Save**

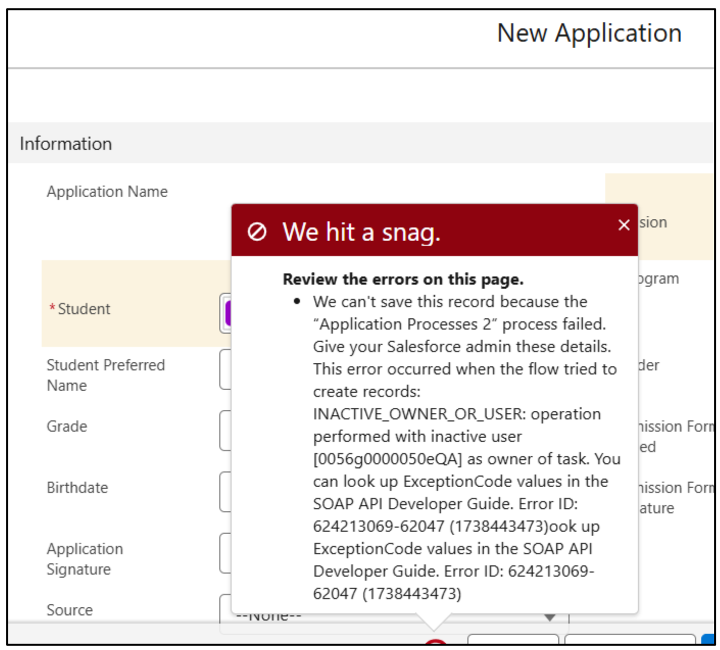

- Why are the session dates out of order?
  *The sessions are automatically in order by the Session Number. The dates can be placed in order by double clicking the Dates column. The first click will put the sessions in descending order, and the second click will place the dates in ascending order.*

- I accidentally entered another range of session dates. Therefore, I see duplicate dates for the sessions. Can I delete them?
  *Yes, you may delete them, but you will have to delete them individually.*

- My attendance is not alphabetical order, is that possible to change?
  *Unfortunately, you cannot change the order of the youth names. Additionally, name placements can change from what session to the next.*

- I received an error message attempting to accept an application (example below). Is this common and what should I do?

  *Yes, this is common and related to the youth information attached to an individual with a deactivated Salesforce license. When this occurs, email the NAZA Operations Manager about the issue.*




- I received an application, but I do not see it. Where is it?
  *There are a few things that might have happened.*
  1. *The applicant might have selected "Home School" as their status but did not select "Home School" as their school.*
     a. *Contact me if you received notification of the application, but do not see it.*
  2. *You may have created your own program and the applications were routed to the application that was created for you by NAZA.*
     a. *Contact me if you created your own program in Salesforce so that I can correct the issue.*

For additional assistance visit NAZAoperationforms Official Linktree to access the Salesforce "HOW TO" Guide.