Volunteer Self Service Portal

- Set-up Guide

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1. About Volunteer Self Service Portal

There is no out of the box Salesforce experience cloud based solution that allows volunteers to sign up and track their volunteering hours through a portal. Customers need to implement a custom solution or use the outdated visual force pages to build a site for this use case.

DemandBlue re-created the current out of the box visualforce pages offered Volunteers for Salesforce (V4S) managed package using the more robust Salesforce Experience cloud. This solution provides a basic experience cloud portal that
1. Captures Volunteer data through forms and creates the volunteer record by performing duplicate checks.
2. Allows volunteers to sign up for volunteer jobs.
3. Captures the Volunteering hours through a portal.
4. Provides personalized experience for logged in Volunteers which allows them to update existing contact details, see the month-wise volunteering effort, upcoming volunteering activities and, volunteering history.

Our solution involves Volunteers for Salesforce (V4S) Managed package, Experience cloud portal, flows, reports/dashboards, Salesforce Enhanced Related list Managed package, custom fields.

2. Setup

Following are the pre-requisites for installing the DemandBlue's volunteer self-service portal app.

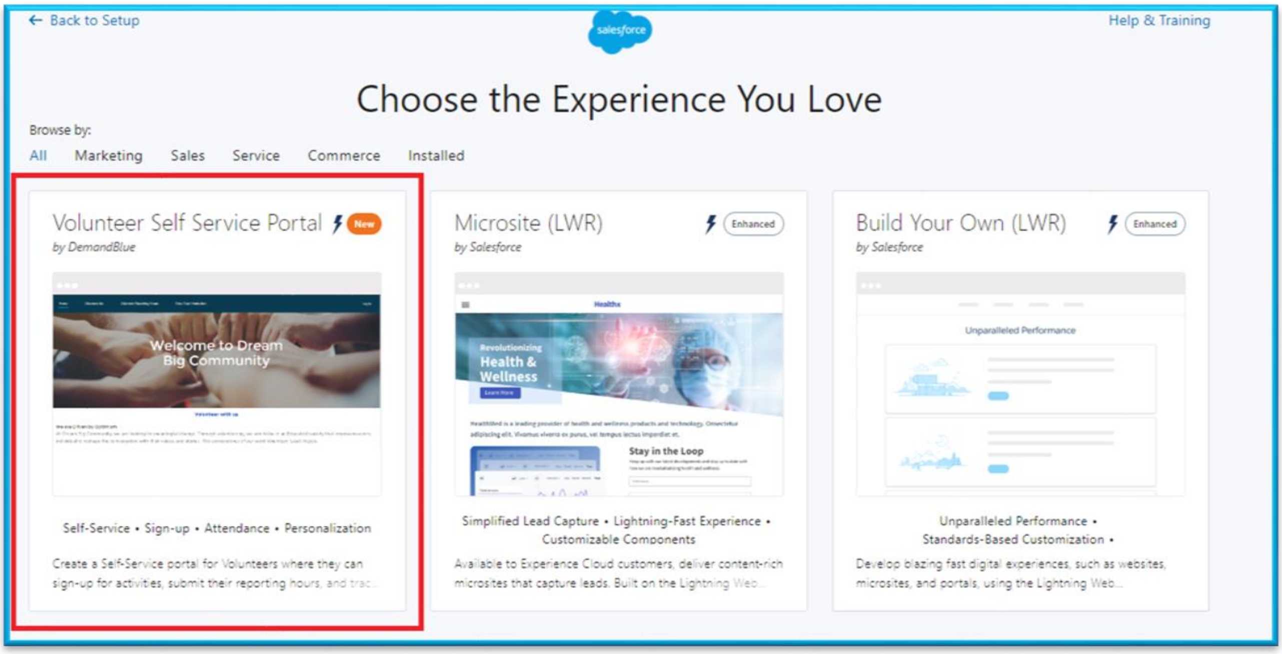
- Nonprofits should have a Salesforce org with Volunteer for Salesforce(V4S) Package.
- Nonprofits should have a Salesforce org with "CMTD Enhanced Related List" package installed for all users.
- Check "Digital Experience" is enabled or not, if not Enable it.
- Nonprofits should have "Partner Community Login License".

Note – NPSP is not mandatory; if NPSP is not installed, automatic account creation will not occur.

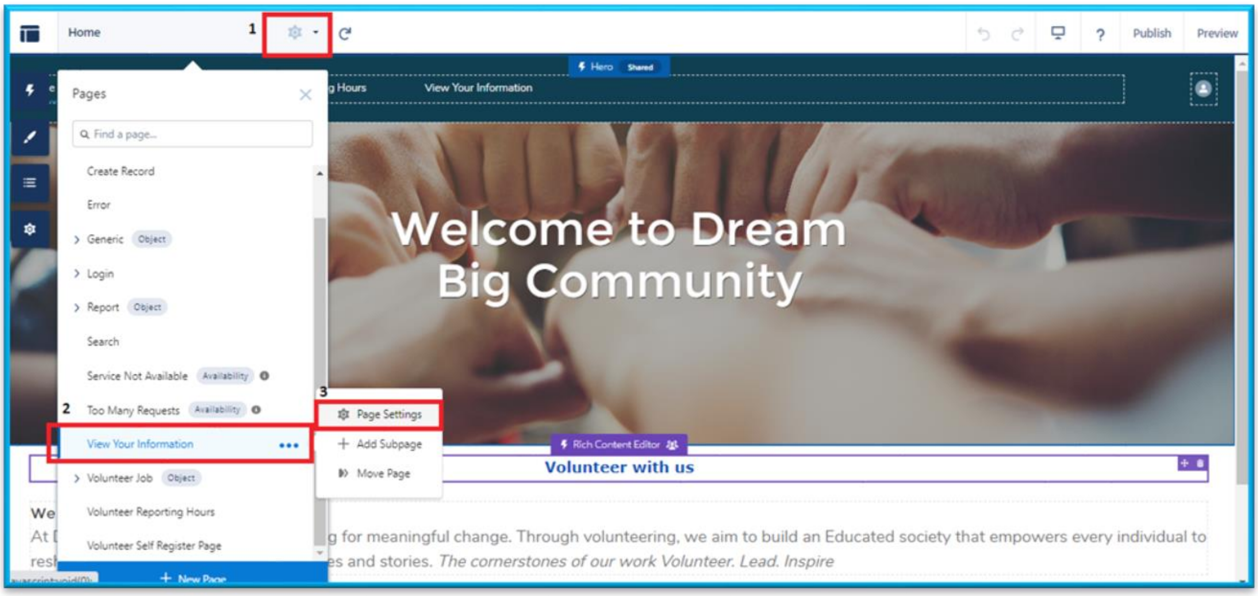
Once the app is installed on your org, the following configurations need to be done.

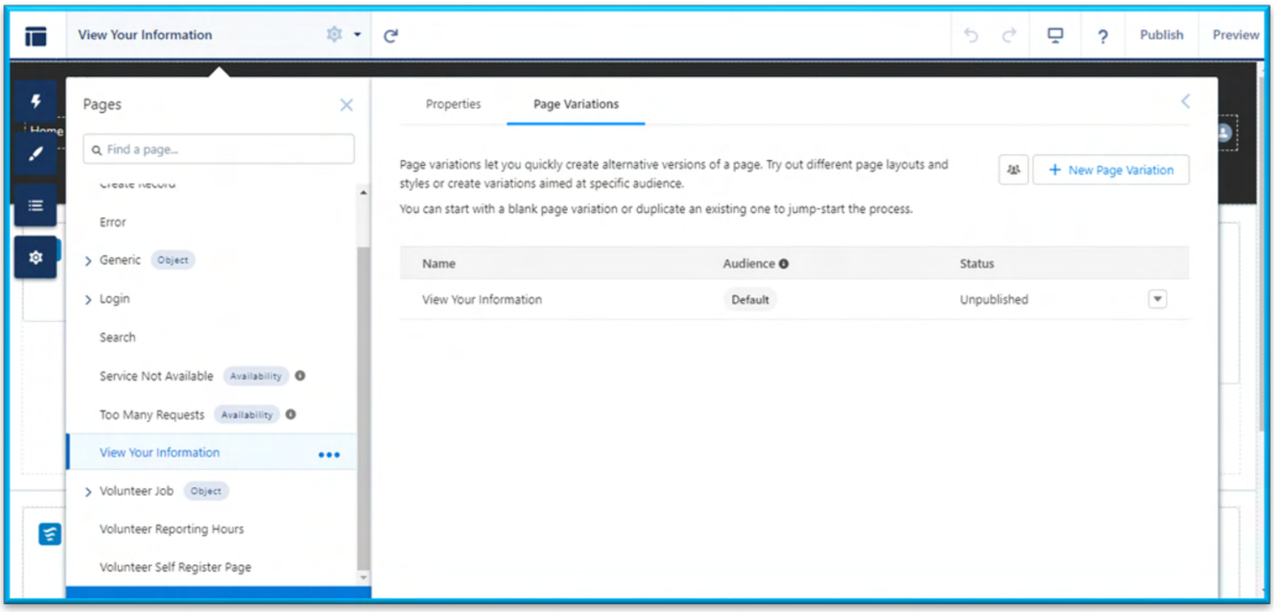
2.1. Create Experience cloud portal

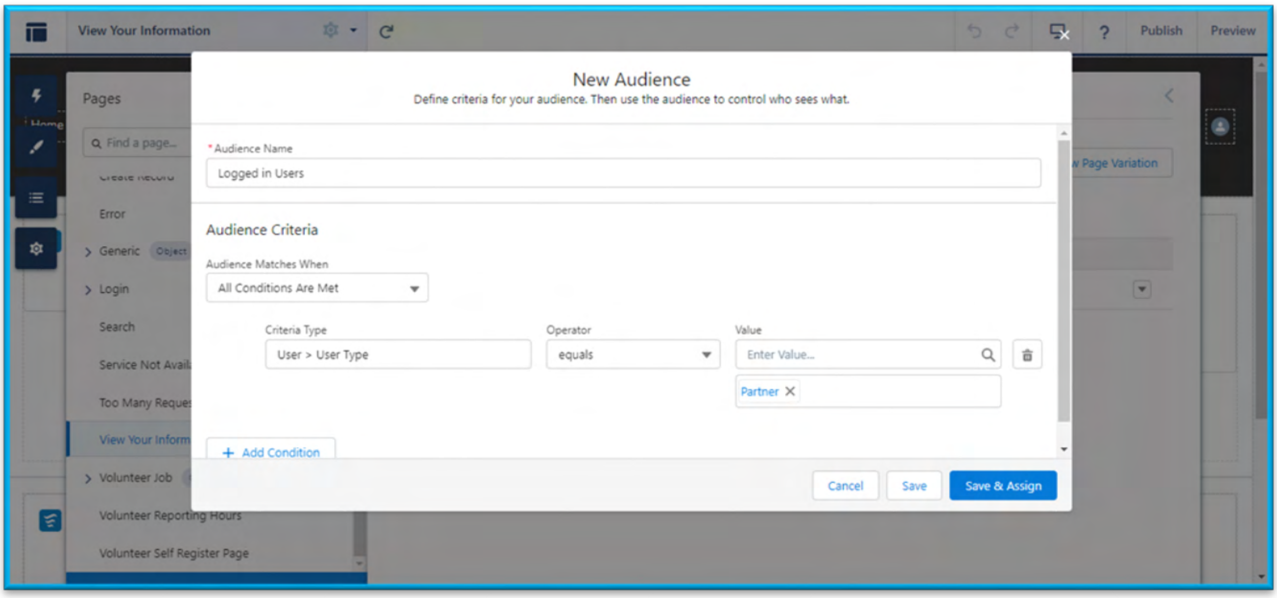
- Create an Experience cloud portal with the installed package template.

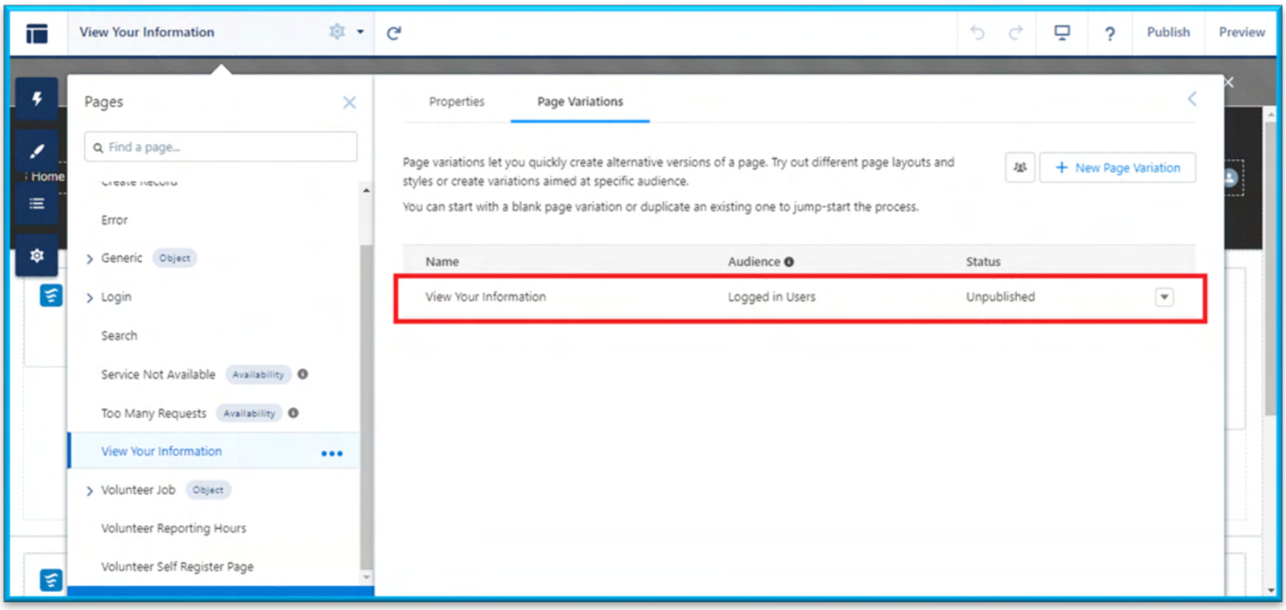


- Open the created portal in builder mode. Navigate to the 'View Your Information' page and change the permission from 'Default' to 'Partner User'.

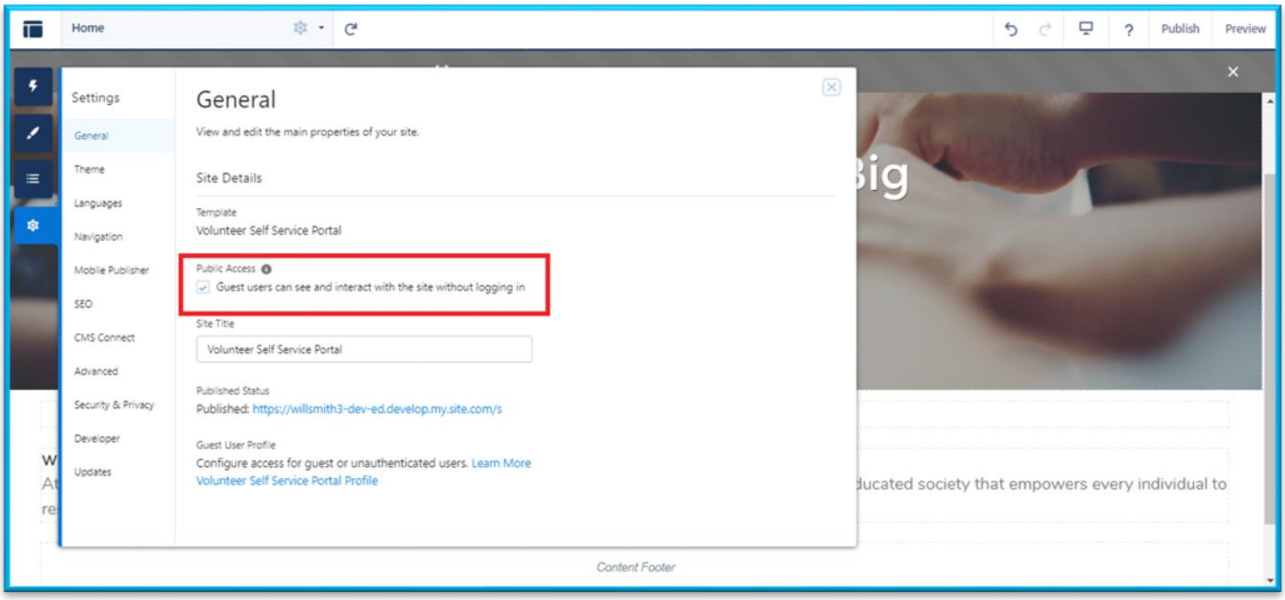



View Your Information
Publish
Preview
Pages
Find a page...
Error
Generic
Object
Login
Search
Service Not Available
Availability
Too Many Requests
Availability
View Your Information
Volunteer Job
Object
Volunteer Reporting Hours
Volunteer Self Register Page
Properties
Page Variations
Page variations let you quickly create alternative versions of a page. Try out different page layouts and styles or create variations aimed at specific audience.
You can start with a blank page variation or duplicate an existing one to jump-start the process.
New Page Variation
Name
Audience
Status
View Your Information
Default
Unpublished

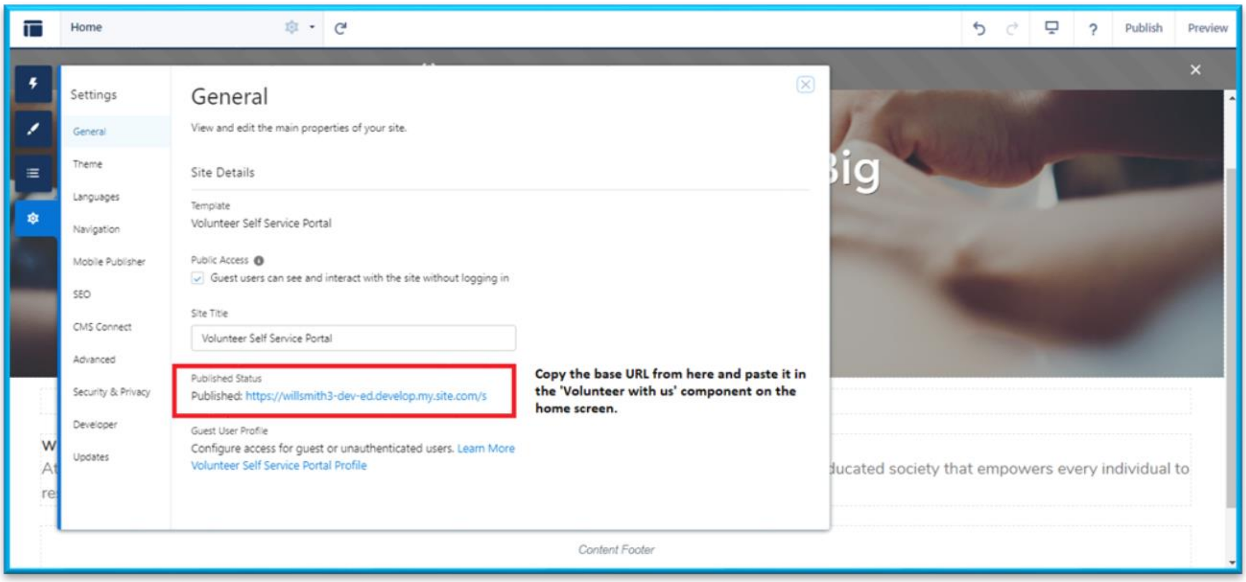

View Your Information
Publish
Preview
New Audience
Define criteria for your audience. Then use the audience to control who sees what.
* Audience Name
Logged in Users
Audience Criteria
Audience Matches When
All Conditions Are Met
Criteria Type
User > User Type
Operator
equals
Value
Enter Value...
Partner
Add Condition
Cancel
Save
Save & Assign
Pages
Find a page...
Error
Generic
Login
Search
Volunteer Job
Volunteer Reporting Hours
Volunteer Self Register Page



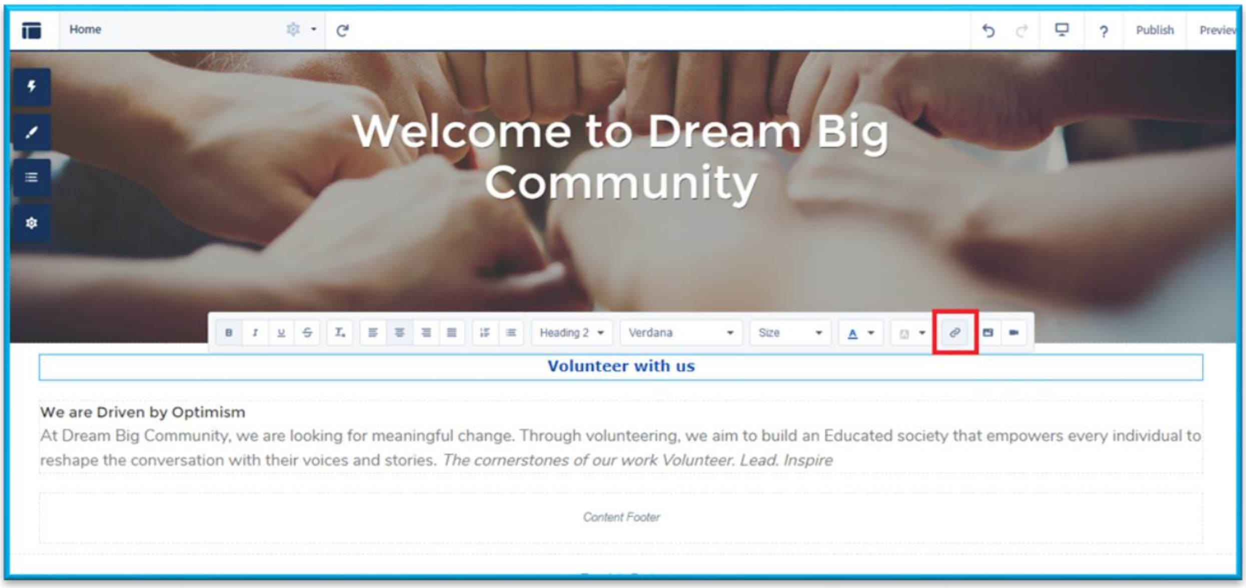
- Enable Guest user profile for the created portal and publish the portal to reflect the changes we made as of now.



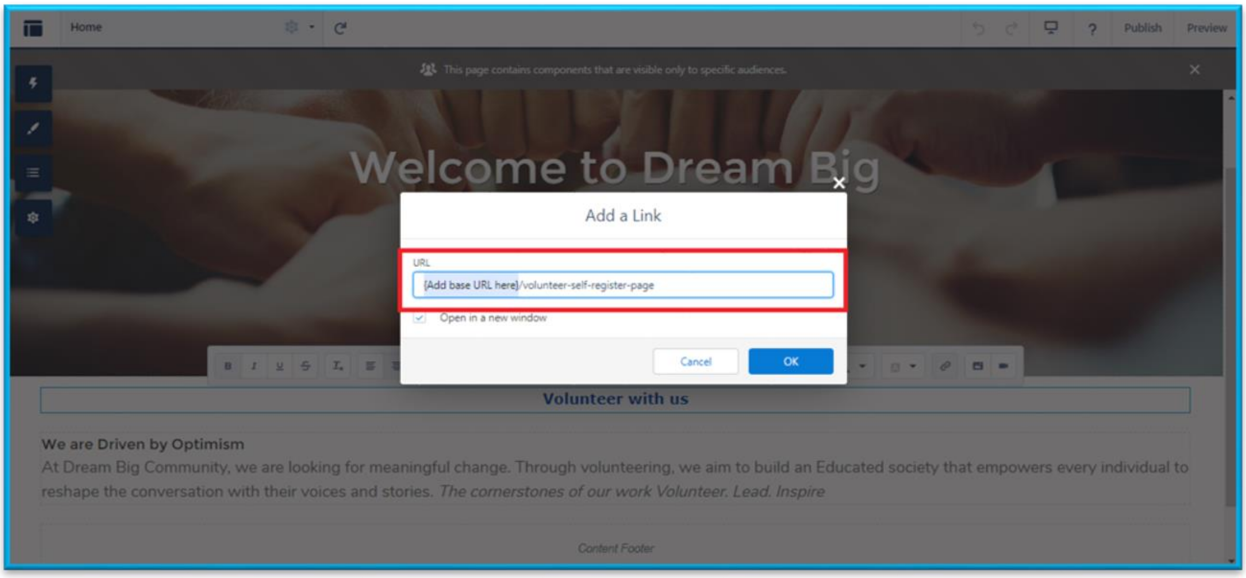
- Change the base URL for the "Volunteer with us" link in Home page, (eg: {Base_URL}/volunteer-self-register-page). Base URL will be unique for your site as shown in below screenshot.



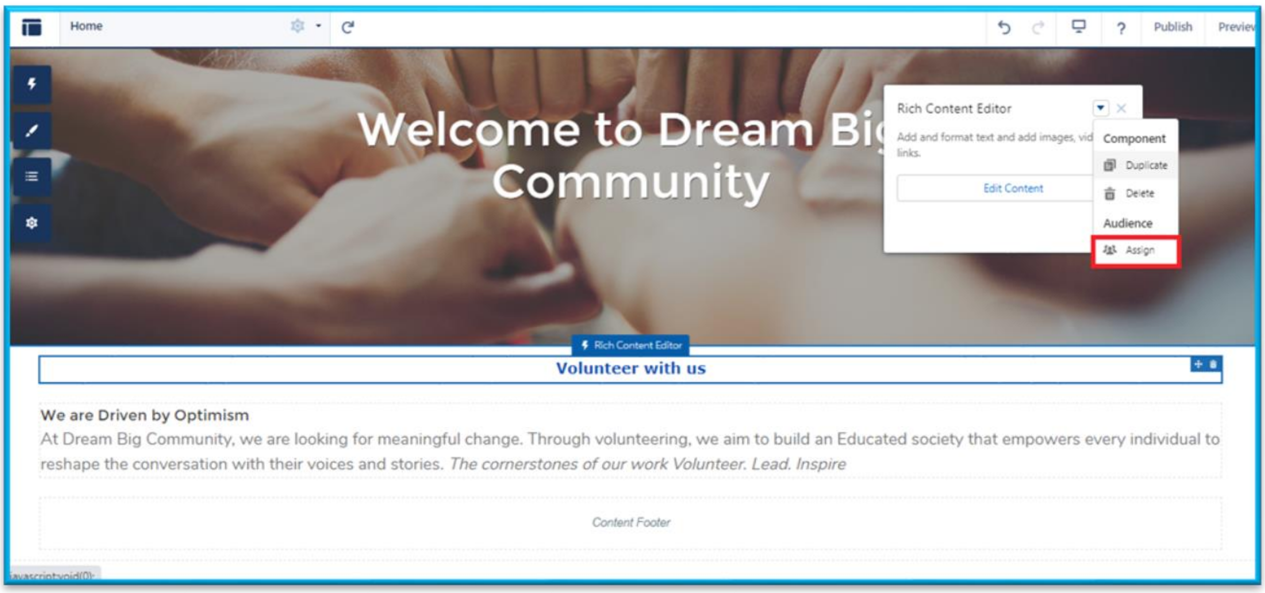
- Click on the link button shown in the screenshot below,



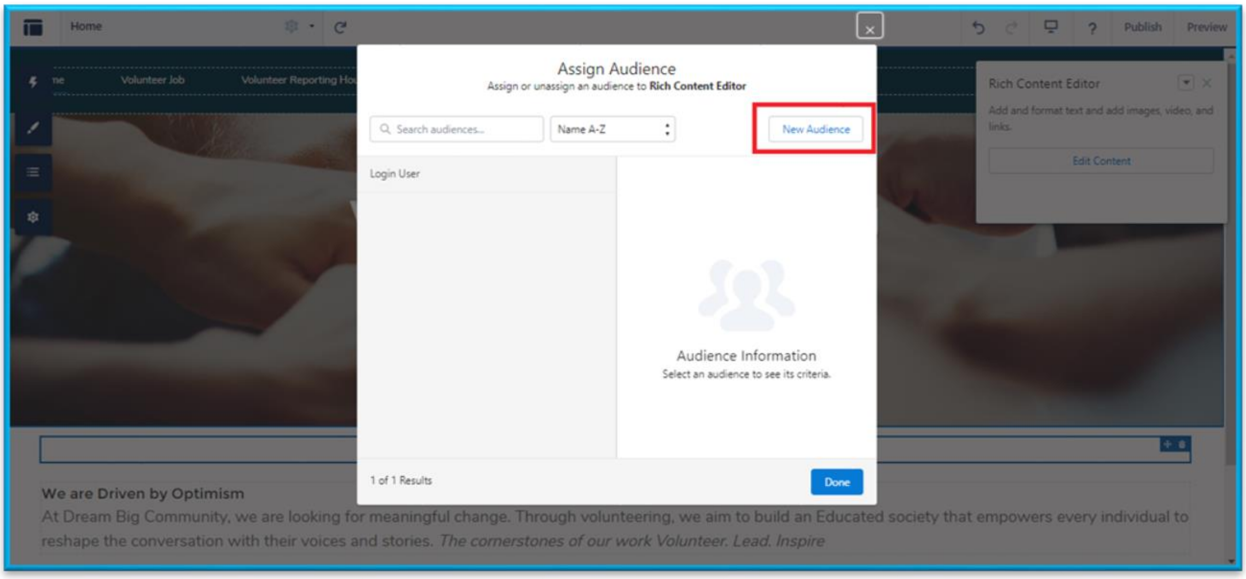
- Replace your base URL here and click ‘Ok’.



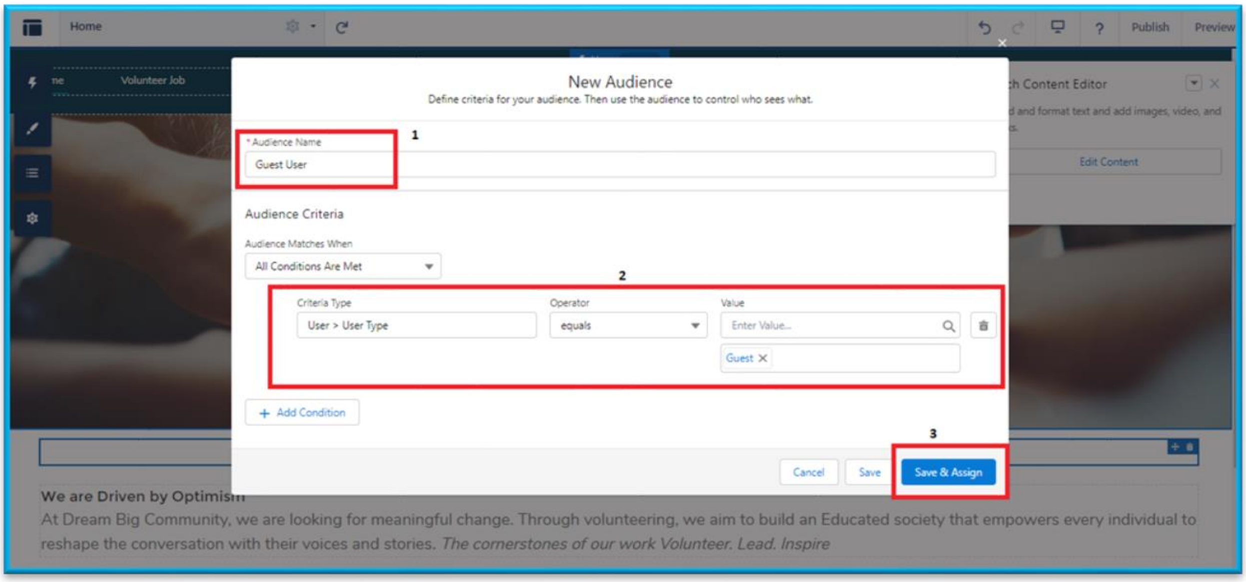
- Change the visibility to guest user only. Select 'Assign' for the rich content editor component.



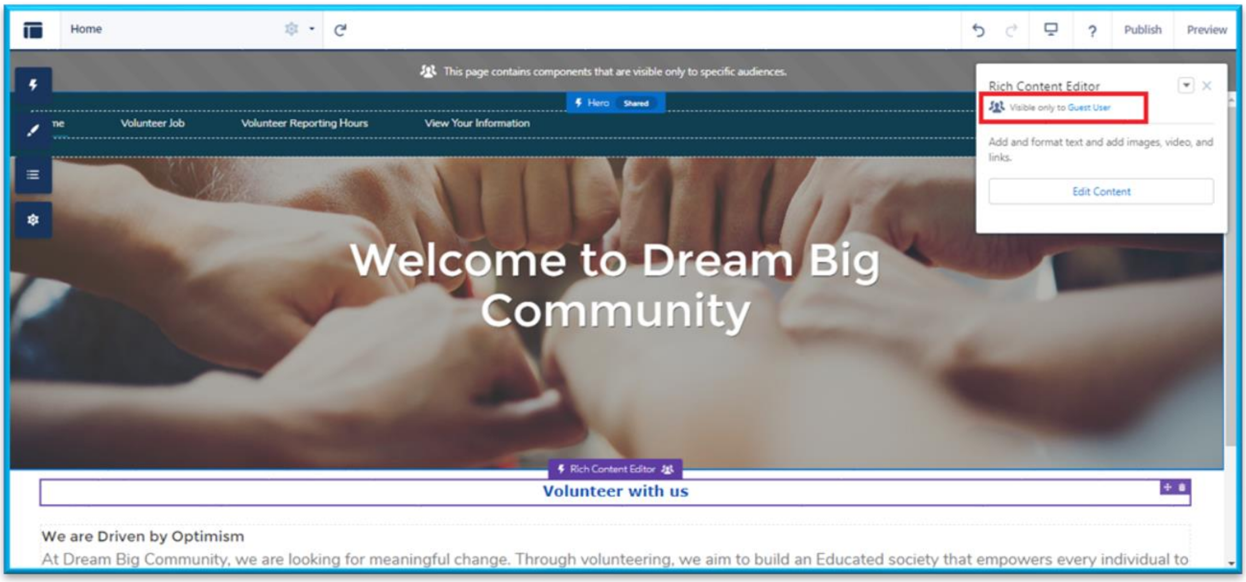
- Click 'New Audience'.



- Add Guest user criteria as shown in the below screenshot and click 'Save and Assign'.



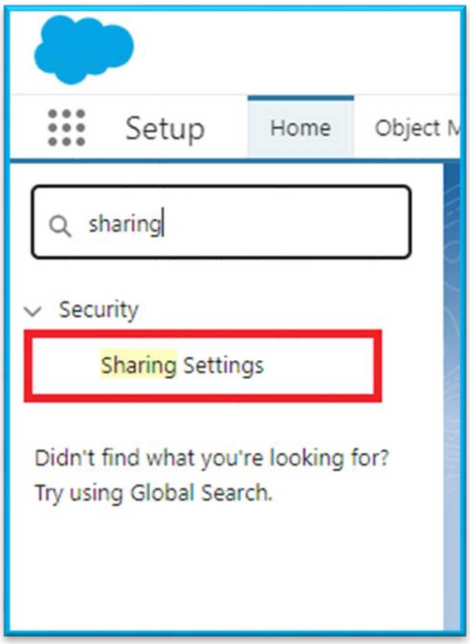
- Publish the site. Finally, your rich content editor component will look like this.



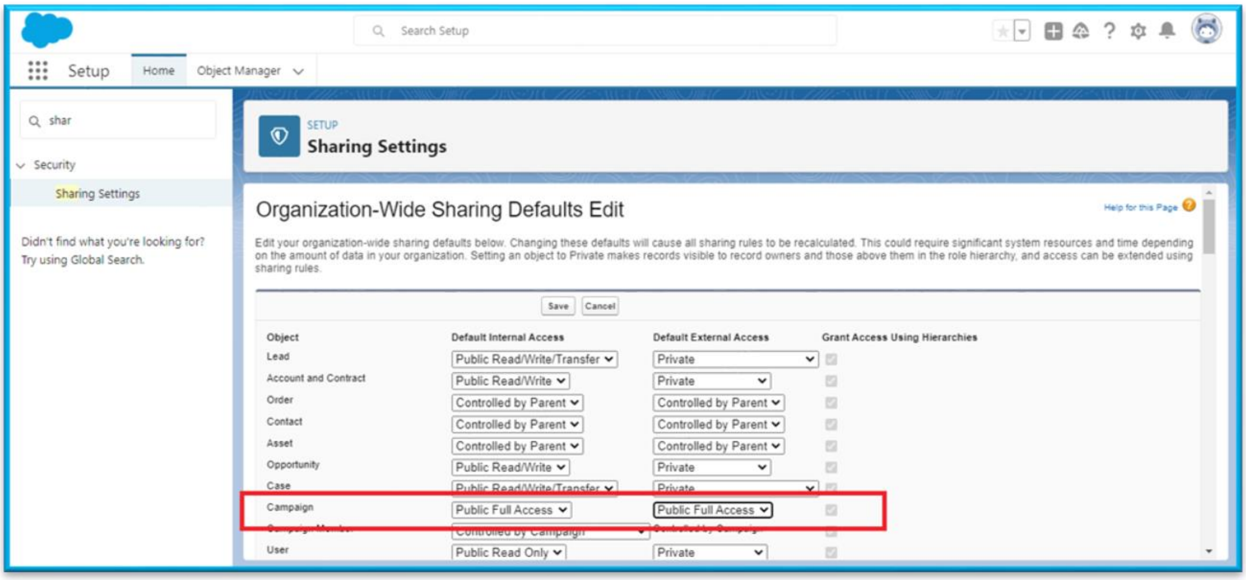
2.2. Sharing Setting Access

- Check and assign access for the Campaign object and write a sharing rule in Campaign object.

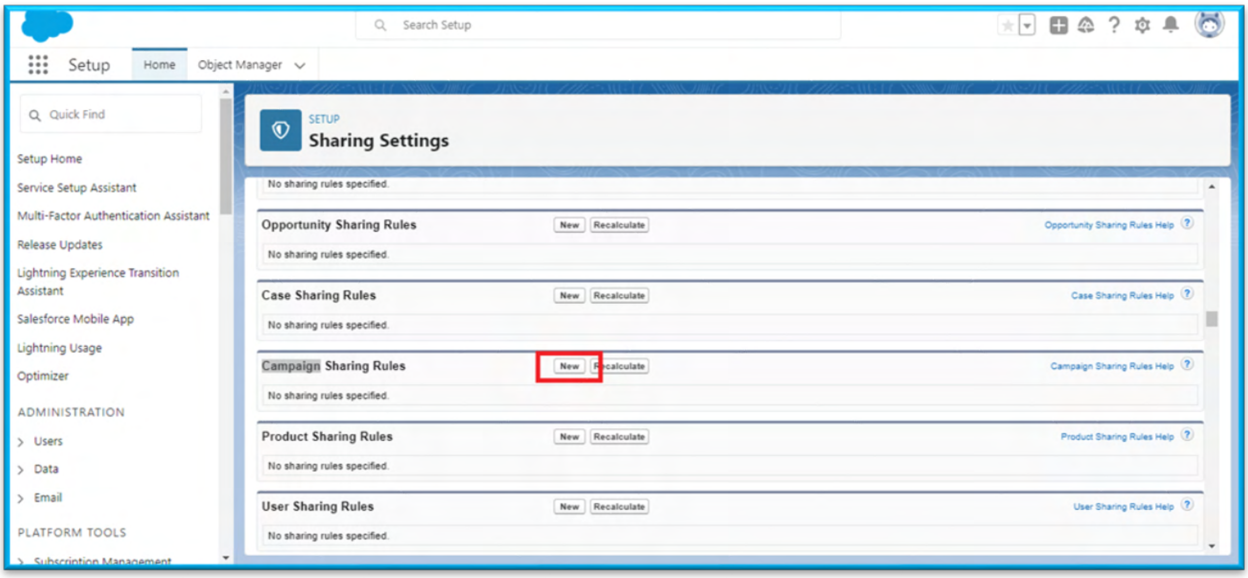
Quick Find Settings search “Sharing Settings”



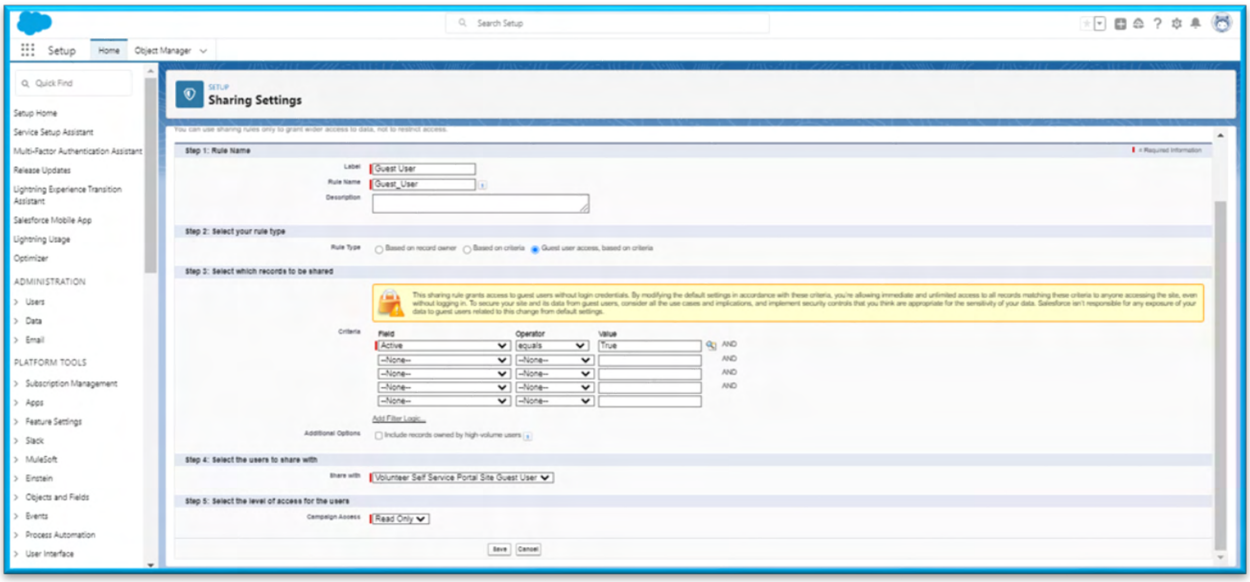
- Campaign object should have public full access for default internal access and external access.



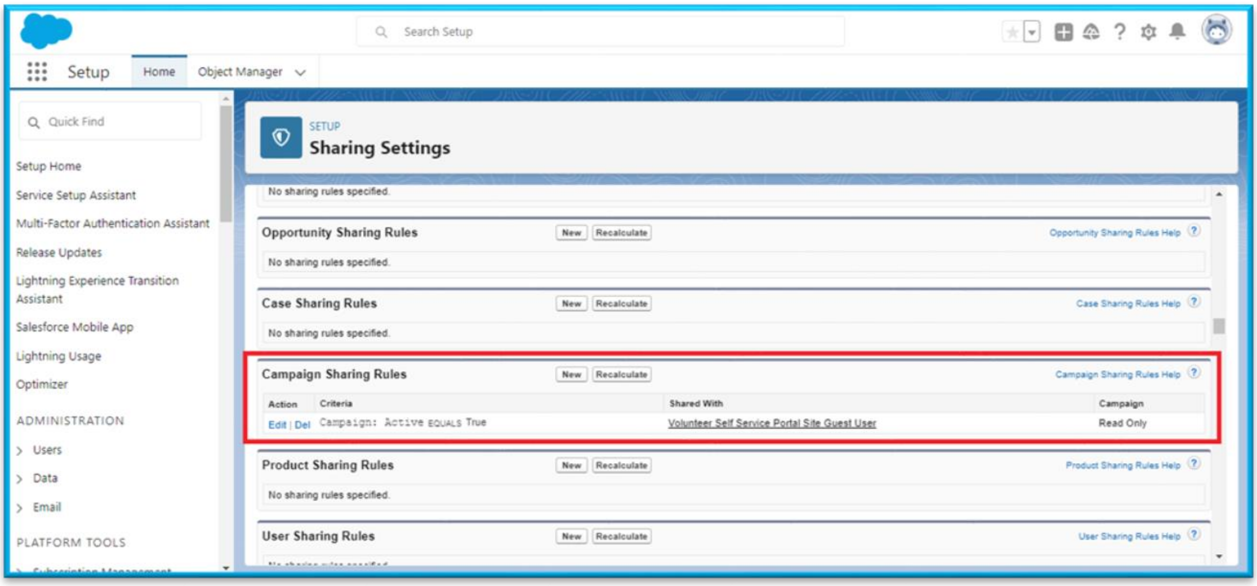
- Create a Campaign Sharing rule. Click on the 'New' button under Campaign Sharing Rules.



- Write a campaign sharing rule for guest user, criteria as "Active equals True". Refer the below screenshot.

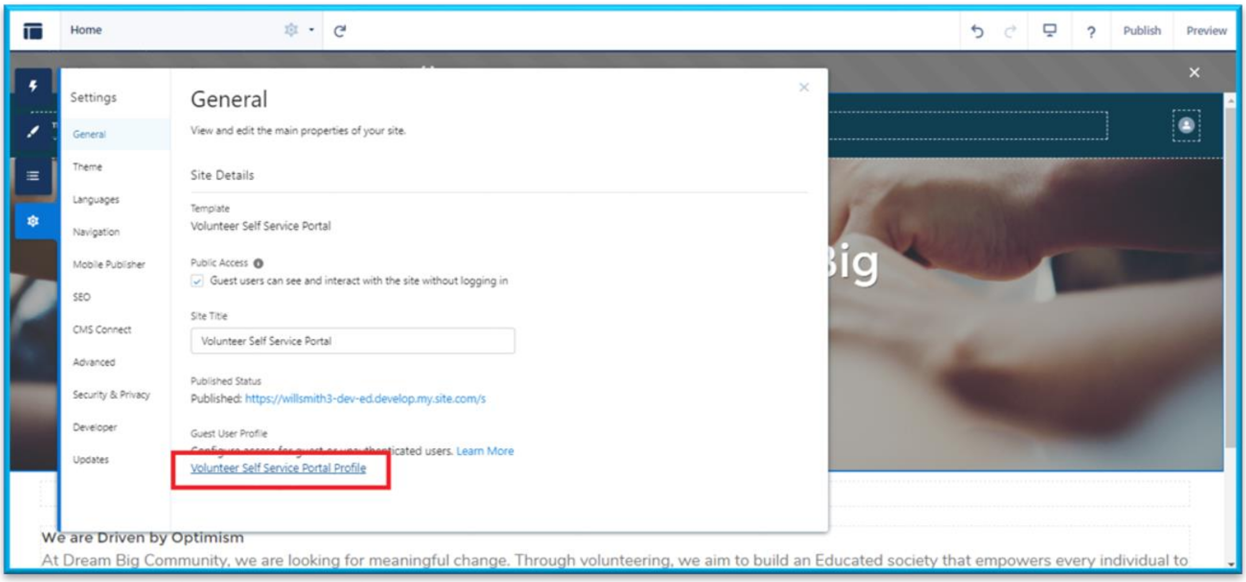


- Finally your Campaign sharing rule will look like this (refer the below screenshot).

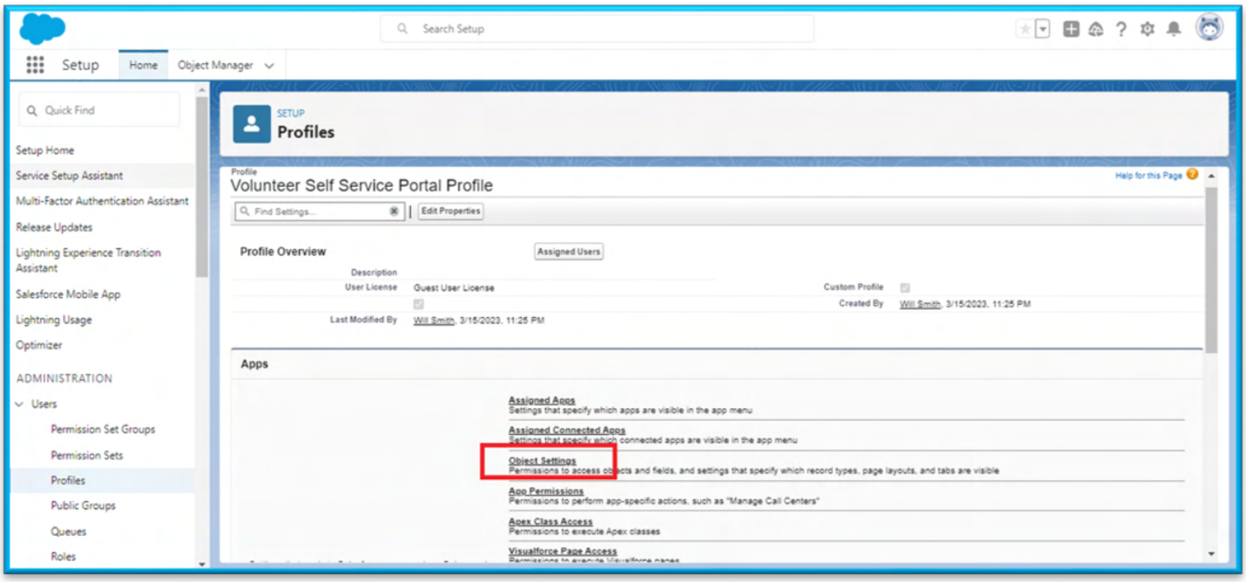


2.3. Assign permissions to Portal Guest User

- Open the site in builder mode, then click on 'Settings' and access the guest user profile as shown in the screenshot,



- Click on the 'Object settings'.



- Assign the below mentioned object, fields and page layout permission for guest user profile.

Object Name	Permission
Volunteer Job	Read
Volunteer Shift	Read

Volunteer Job fields and Page Layout:

Field Name	Permission
Description	Read
Location City	Read
Location State/Province	Read
Location Zip/Postal Code	Read

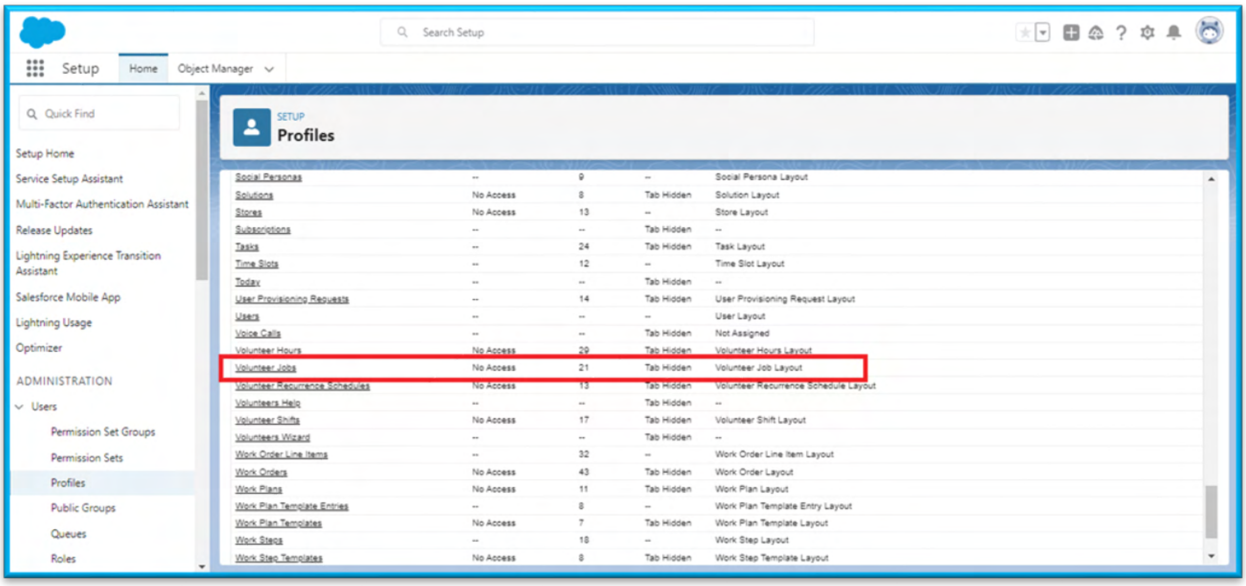
Object Name	Page Layout Name
Volunteer Job	Community Portal Volunteer Job Layout

Volunteer Shift fields and Page Layout:

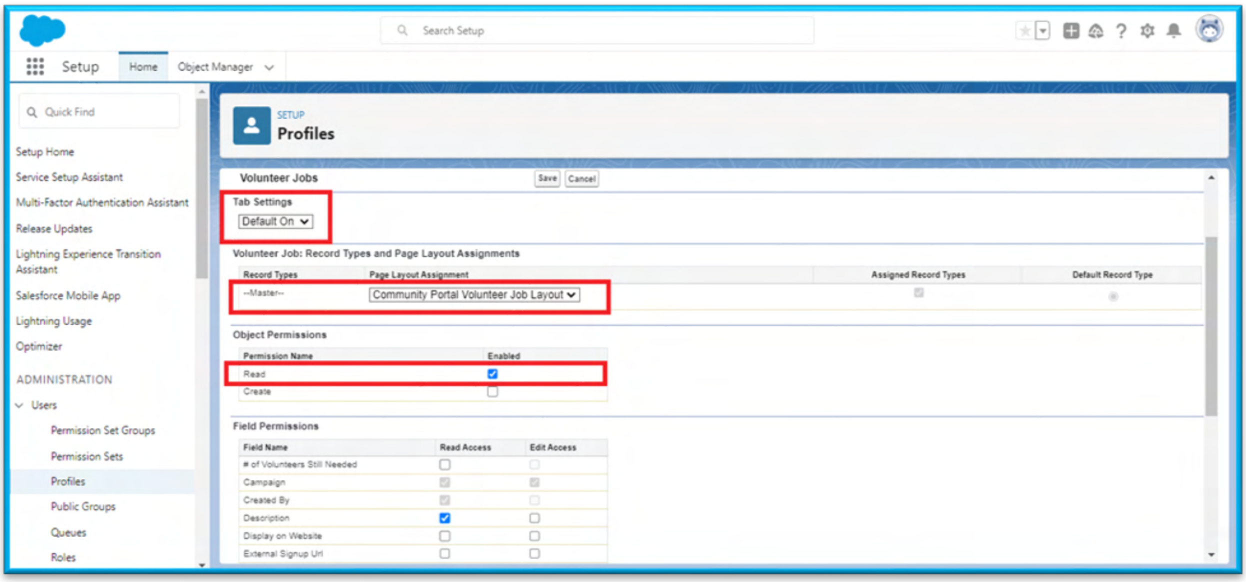
Field Name	Permission
Description	Read
Job Location City	Read

Object Name	Page Layout Name
Volunteer Shift	Community Portal Volunteer Shift Layout

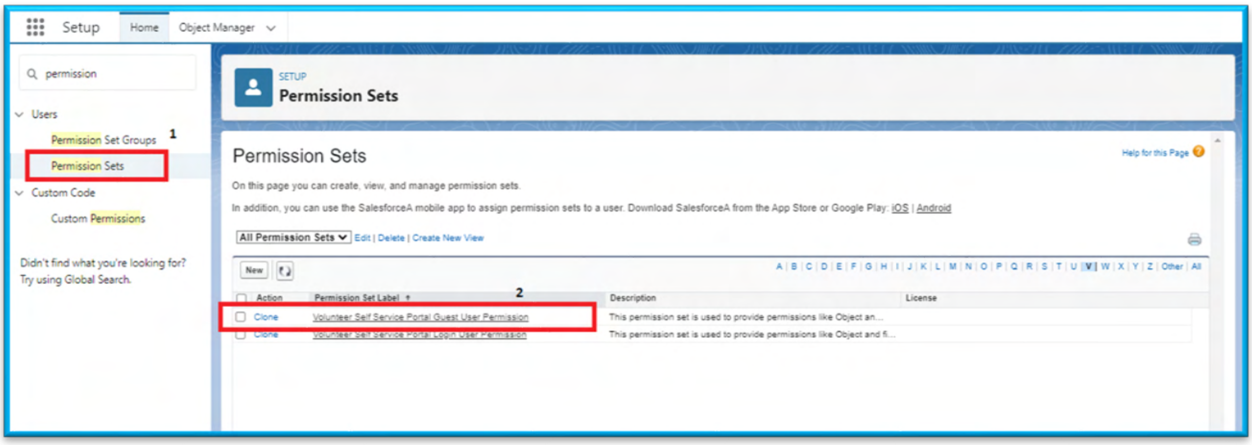
- Click on the ‘Volunteer Job’ Object.



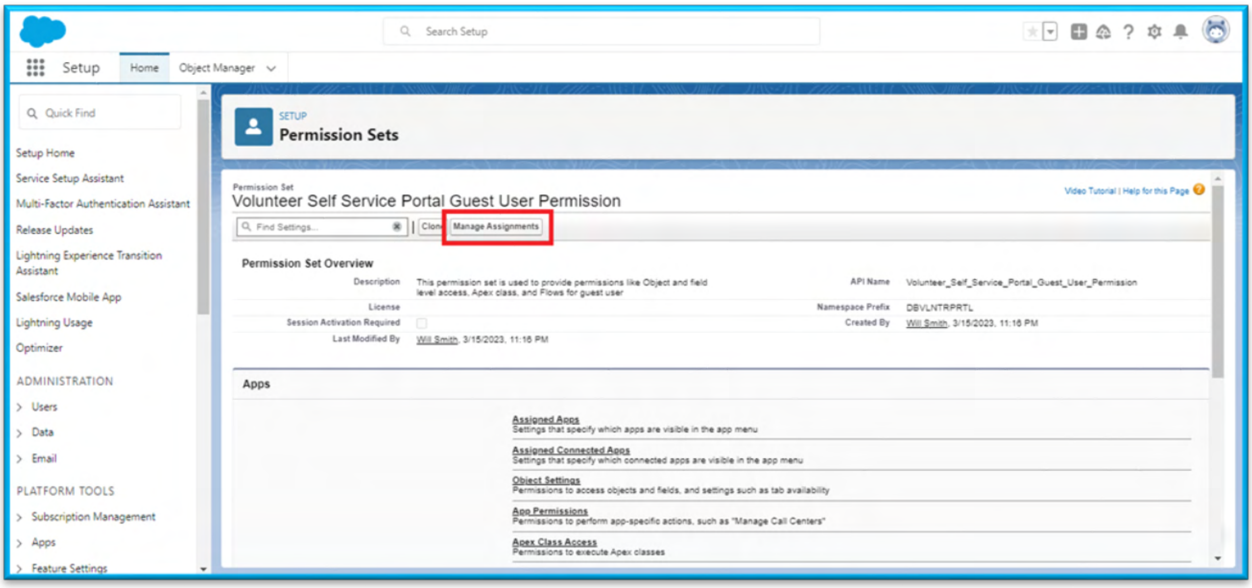
- Click 'Edit' and set the tab settings to 'Default On', change the page layout to 'Community Portal Volunteer Job Layout', enable read permission for the Volunteer Job object, and enable read permission for the following fields: Description, Location City, Location State/Province, Location Street, and Location Zip/Postal Code.



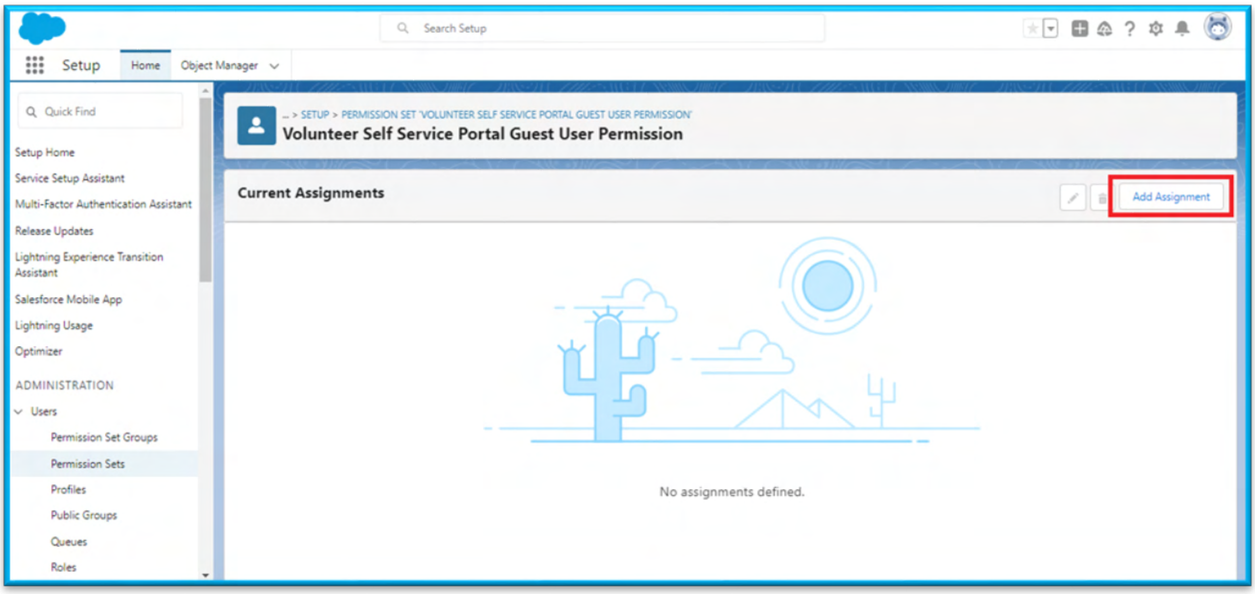
- Repeat the same steps for the 'Volunteer Shift' object as well.
- Go to 'Permission Set' and then click on 'Volunteer Self Service Portal Guest User Permission'.



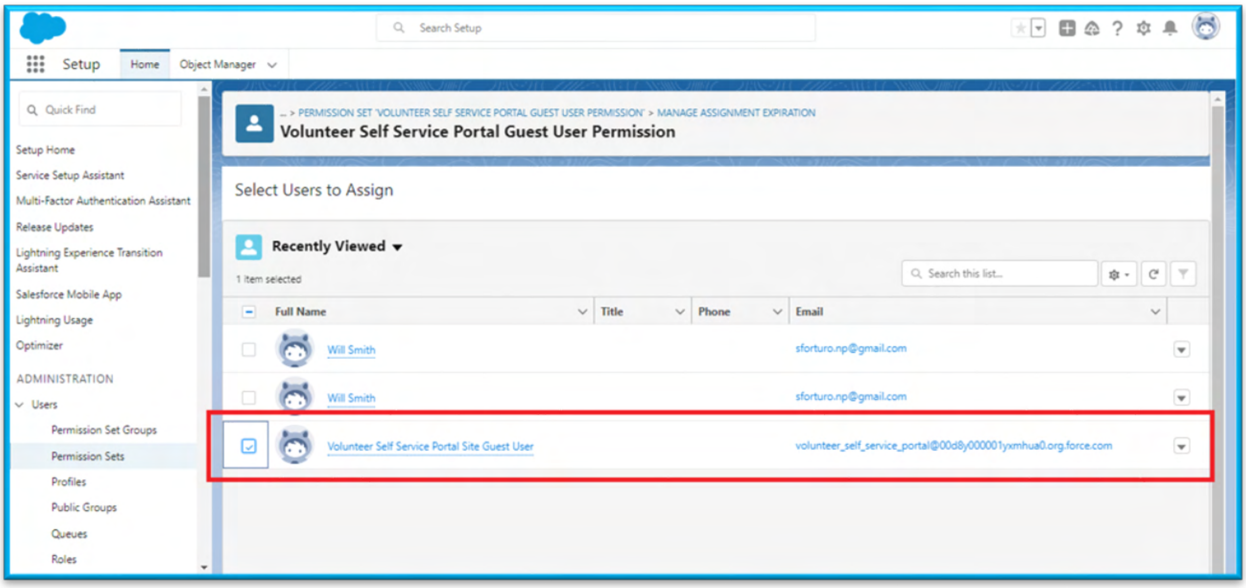
- Click on the 'Mange Assignments'.



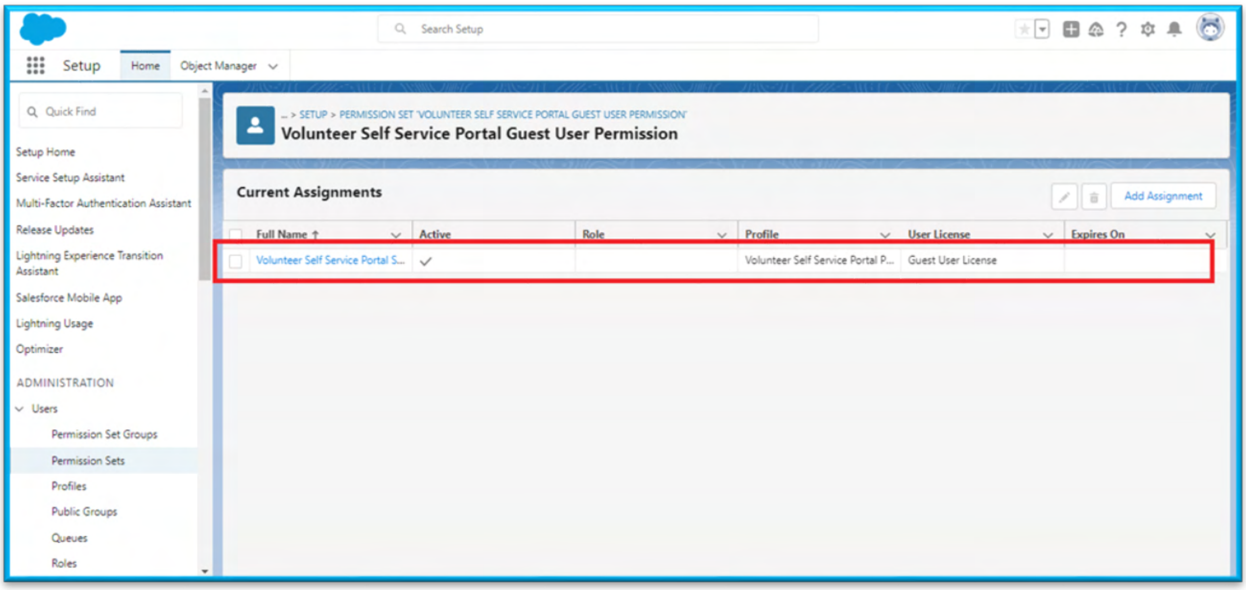
- Click 'Add Assignment'.



- Select your site guest user, click Next, and then Assign.

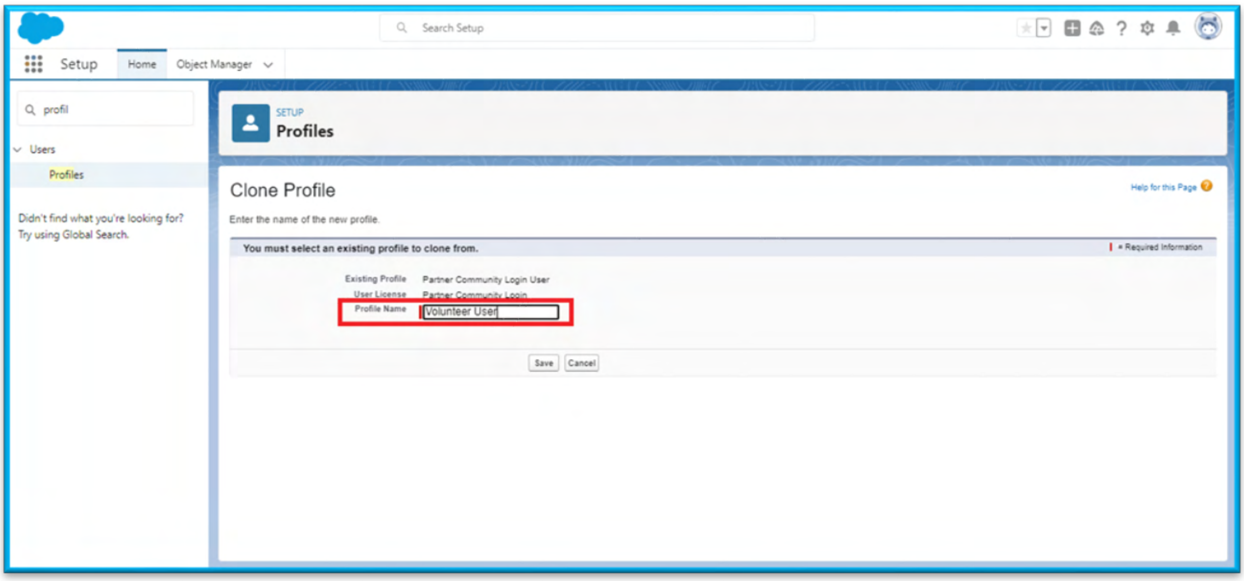


- The permission set has been successfully assigned to the guest user.



2.4. Assign permissions to Portal Login User

- Clone the “Partner Community Login User” profile and give any name. For example: Volunteer User



- Assign the below mentioned object, fields and page layout permission for Volunteer user profile.

Object Name	Permission
Volunteer Job	Read
Volunteer Shift	Read
Volunteer Hour	Read

Volunteer Job fields and Page Layout:

Field Name	Permission
Description	Read
Location City	Read
Location State/Province	Read
Location Zip/Postal Code	Read

Object Name	Page Layout Name
Volunteer Job	Community Portal Volunteer Job Layout

Volunteer Shift fields and Page Layout:

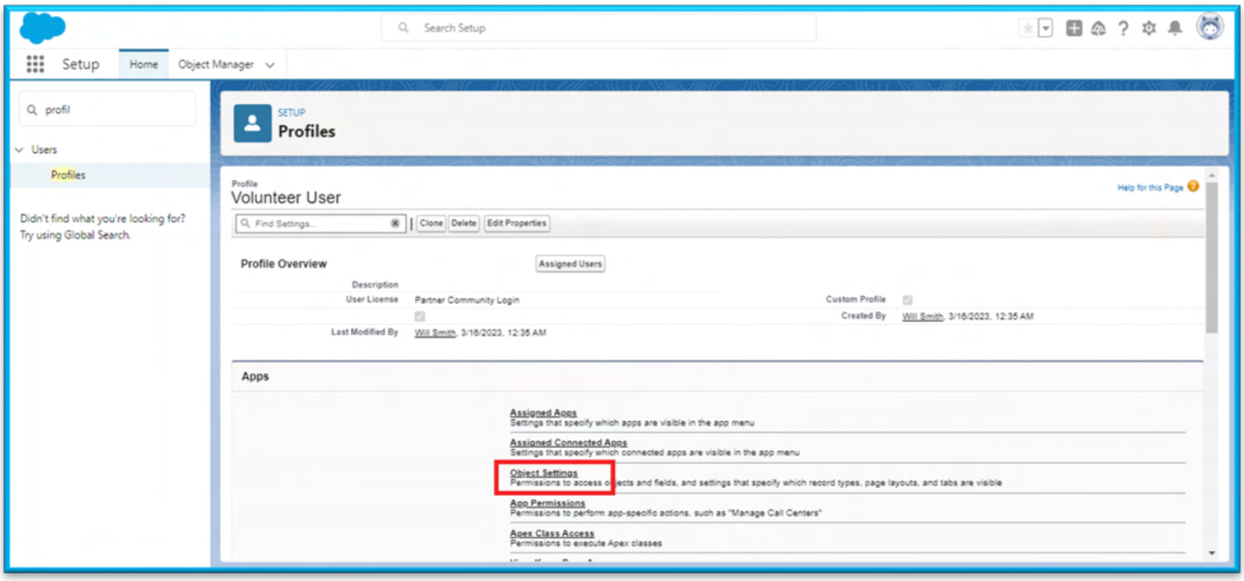
Field Name	Permission
Description	Read
Job Location City	Read

Object Name	Page Layout Name
Volunteer Shift	Community Portal Volunteer Shift Layout

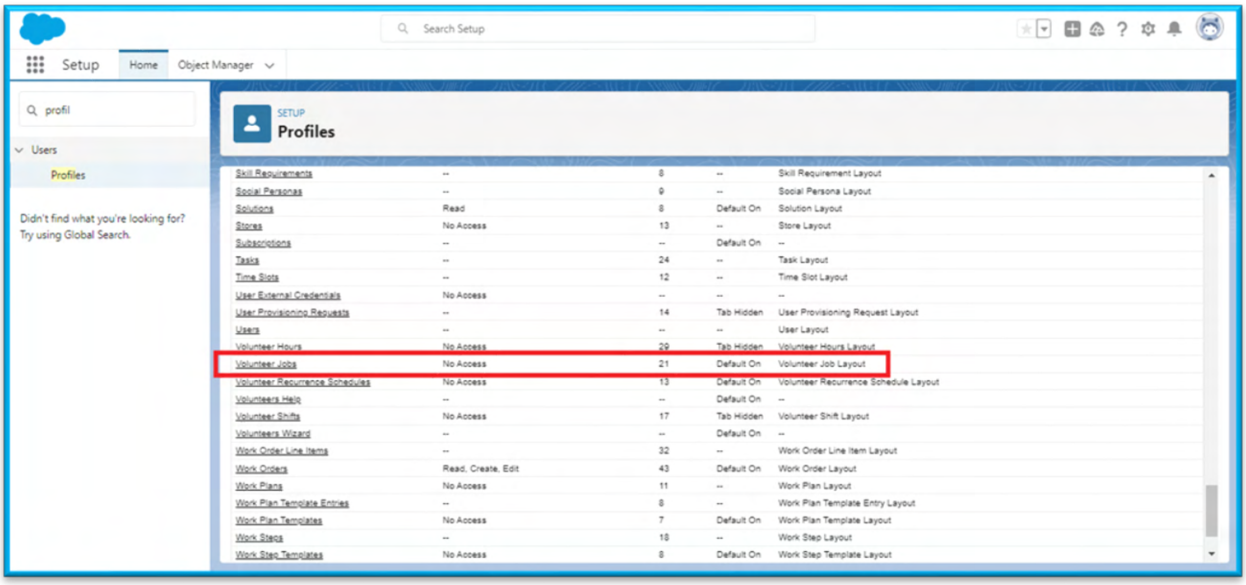
Volunteer Hour fields:

Field Name	Permission
Full Name	Read
Hours Worked	Read
Month Name	Read
Start Date	Read
Status	Read
Total Hours Worked	Read
Volunteer Campaign Name	Read
Volunteer Shift	Read

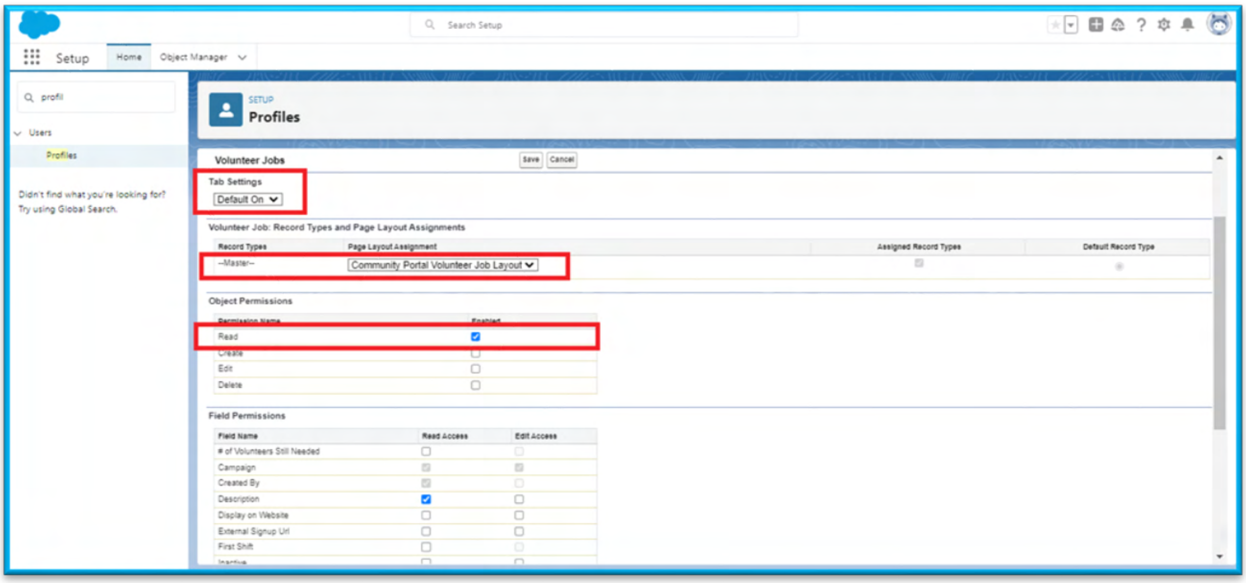
- Click on the ‘Object Settings’.



- Click on the 'Volunteer Job' Object.



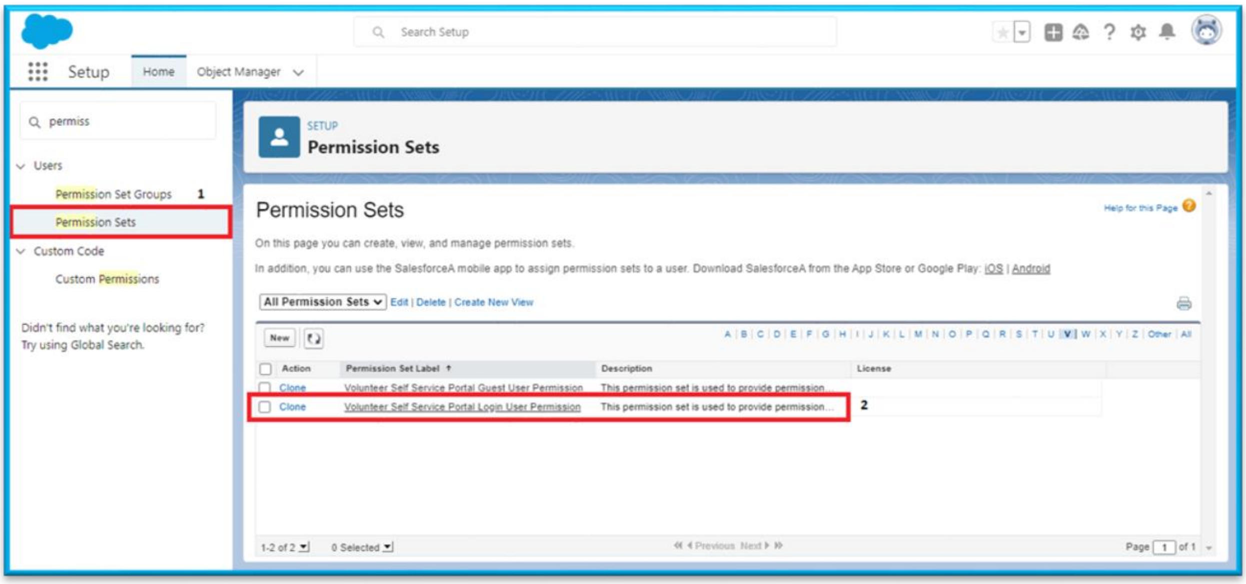
- Click 'Edit' and set the tab settings to 'Default On', change the page layout to 'Community Portal Volunteer Job Layout', enable read permission for the Volunteer Job object, and enable read permission for the following fields: Description, Location City, Location State/Province, Location Street, and Location Zip/Postal Code.



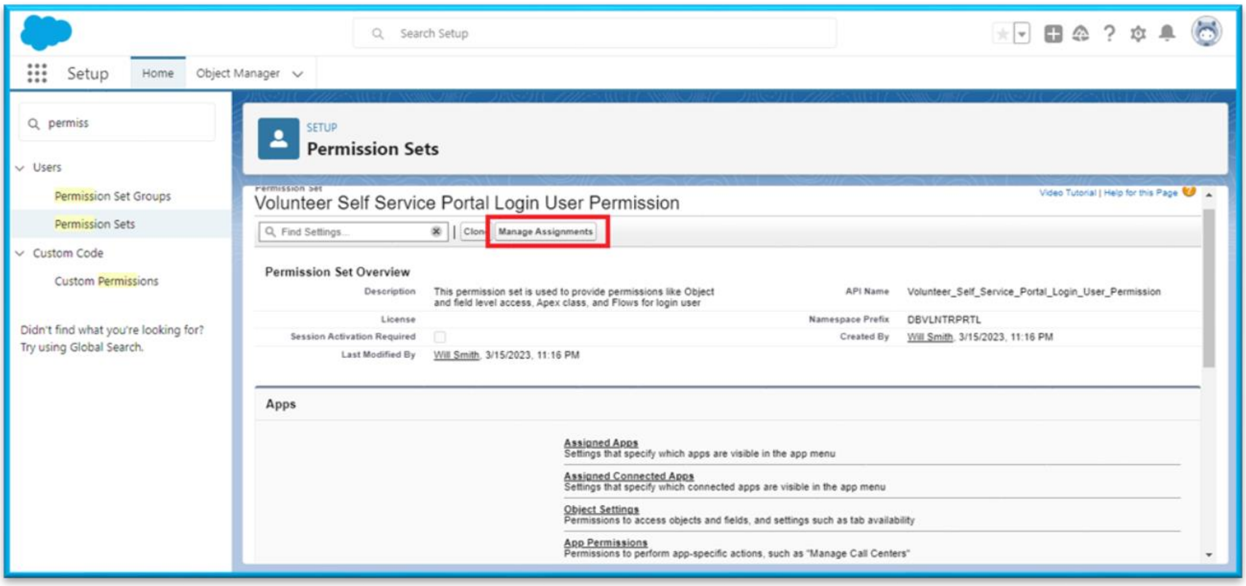
- Repeat the same steps for the 'Volunteer Shift' and 'Volunteer Hour' objects as well.

Note – Before adding a permission set, make sure that you have created a Volunteer portal user using the 'volunteer user' profile.

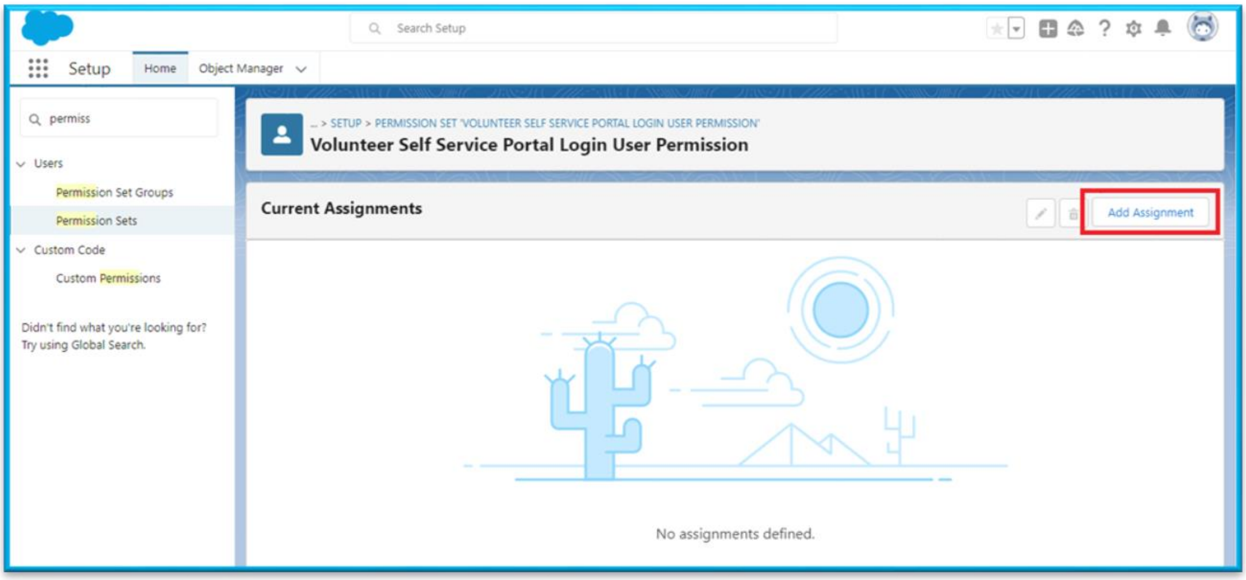
- Go to 'Permission Set' and then click on 'Volunteer Self Service Portal Login User Permission'.



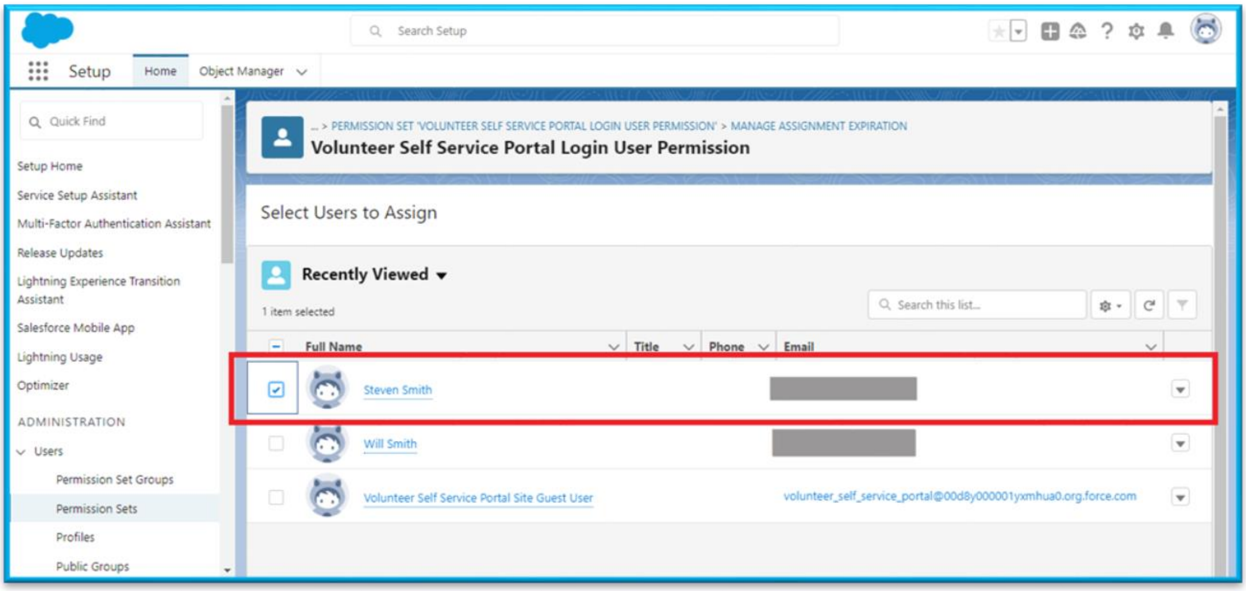
- Click 'Manage Assignments'.



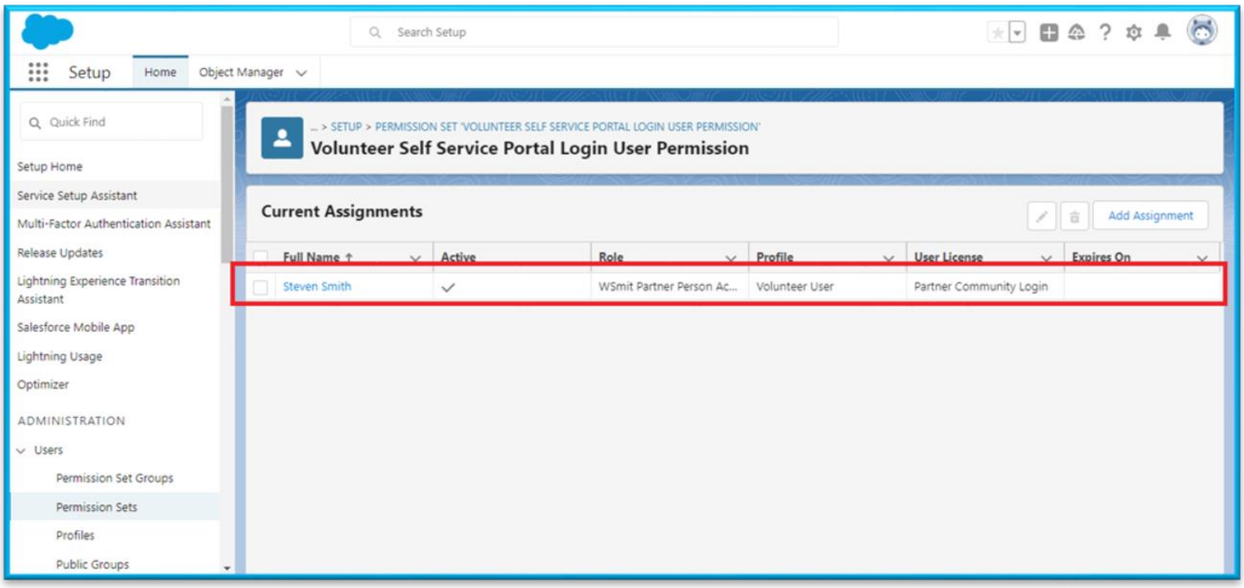
- Click 'Add Assignment'.



- Select your site login user, click ‘Next’, and then ‘Assign’.

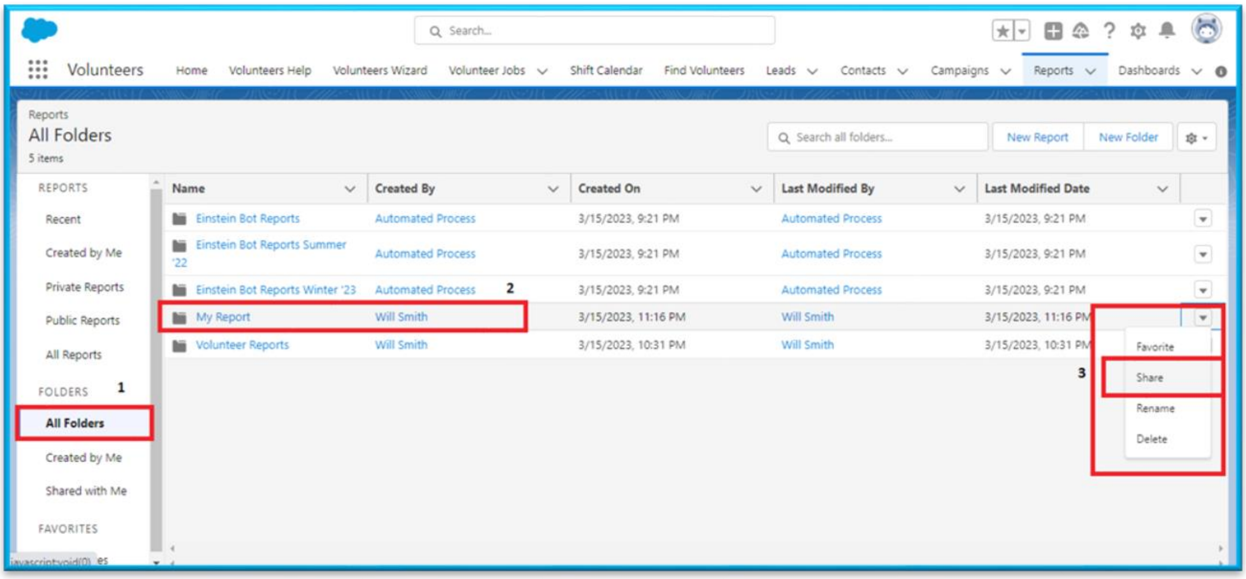


- The permission set has been successfully assigned to the login user.

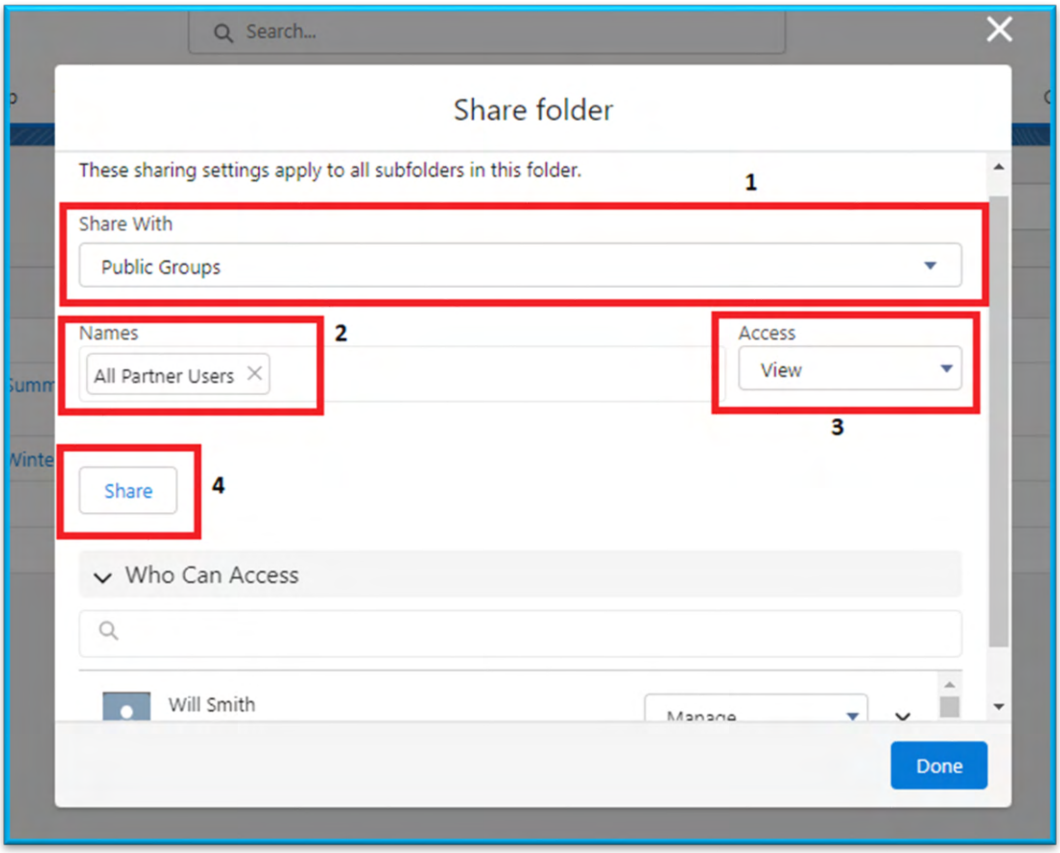


2.5. Reports and Dashboards

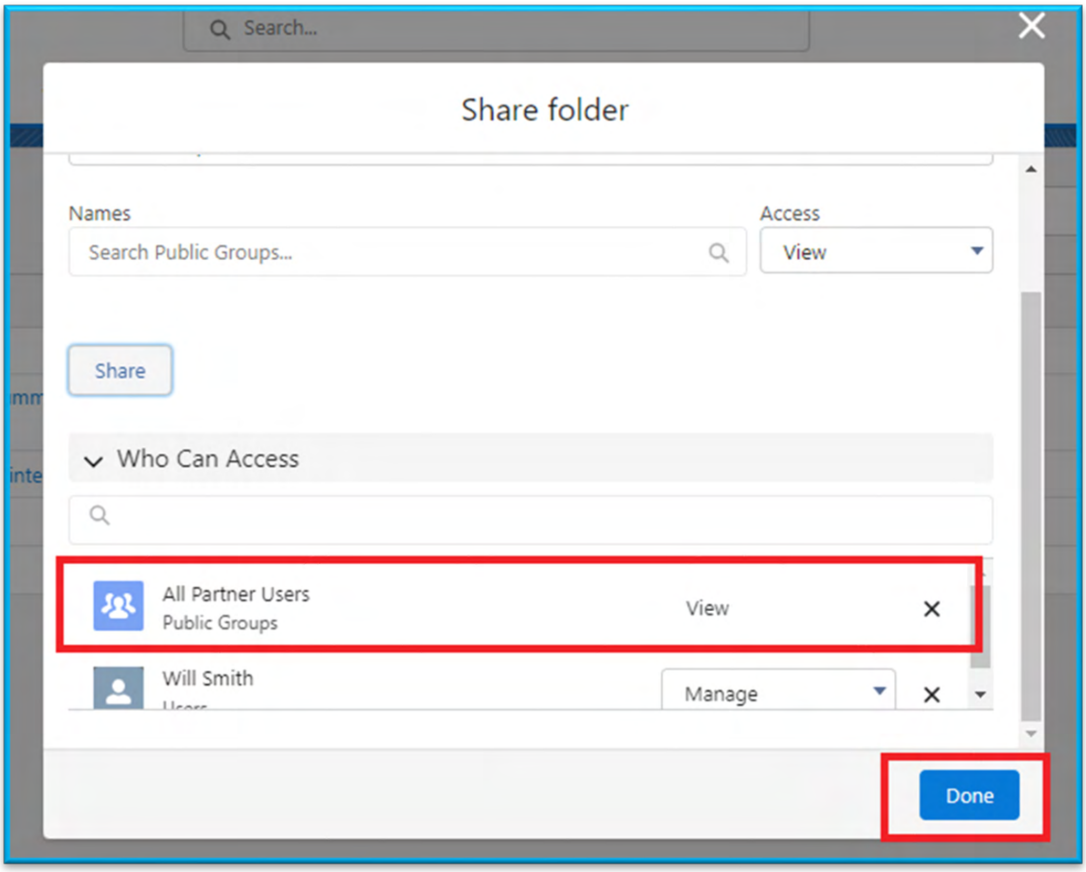
- Share the reports and dashboards that were received from the Volunteer self-service portal package with the portal login user.
- Go to 'Reports', select 'All Folders', then choose 'My Report', and click on 'Share'.



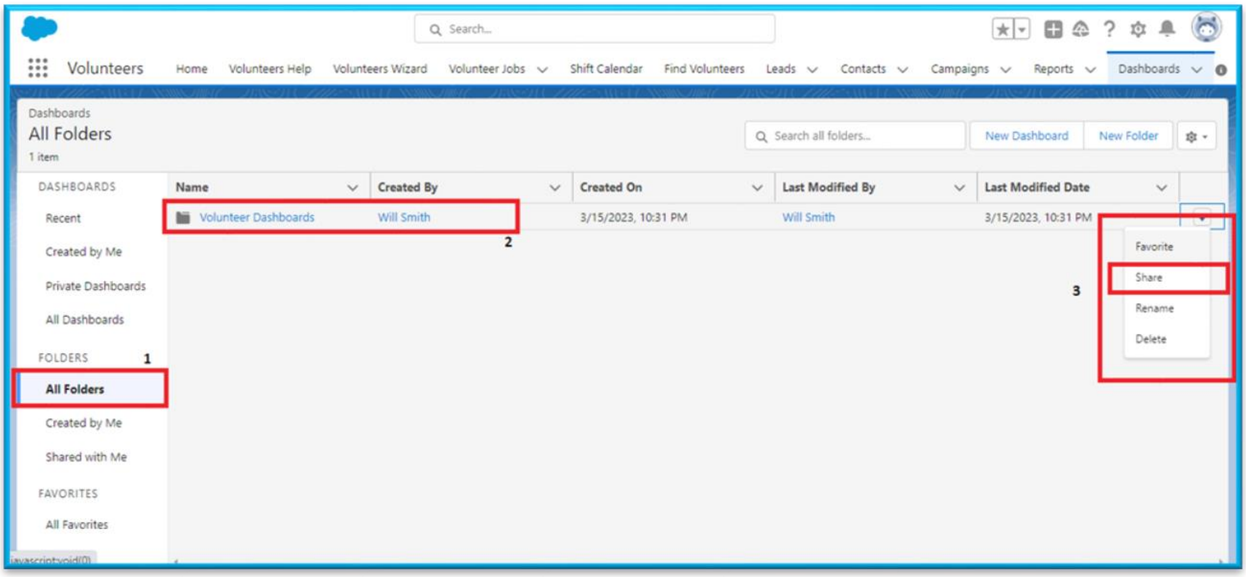
- Select 'Public groups' and set the name to 'All Partner Users', set the access to 'View', then click on 'Share'.

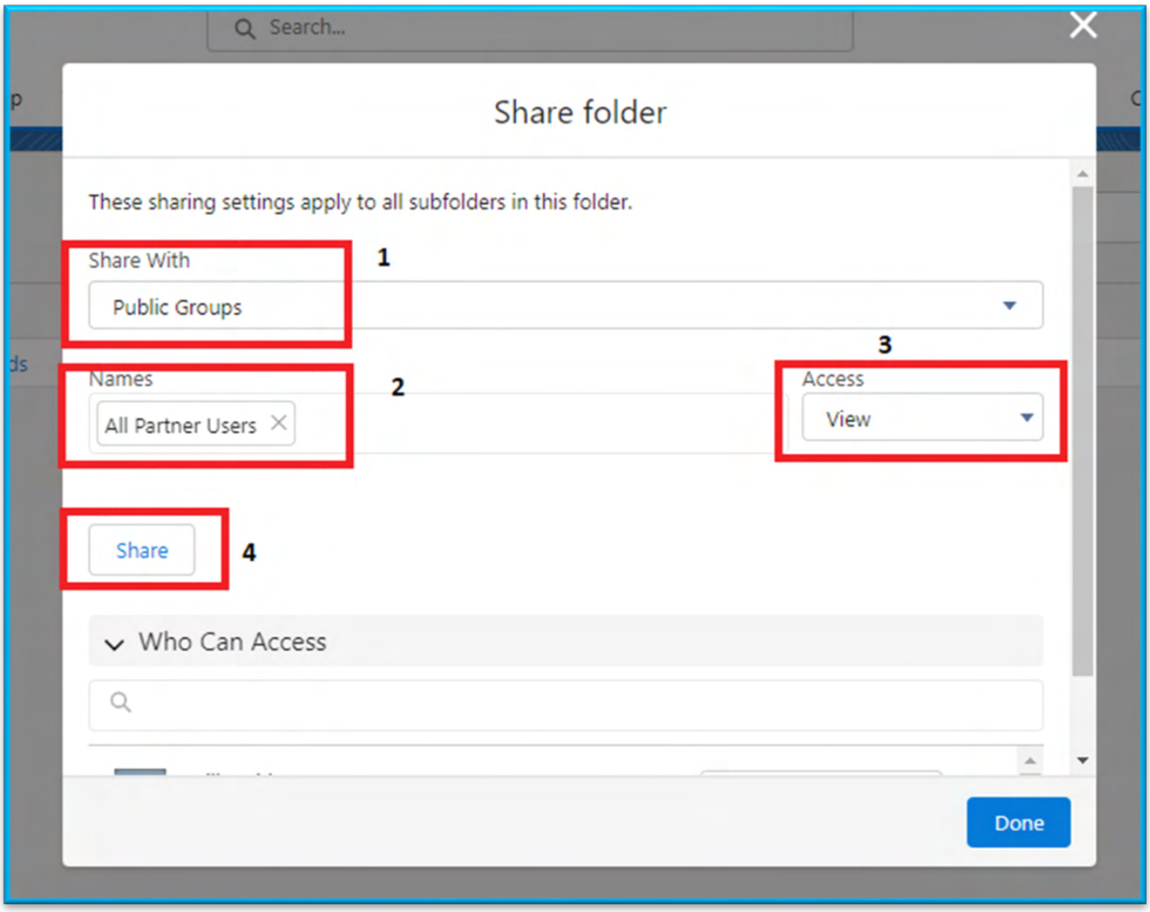


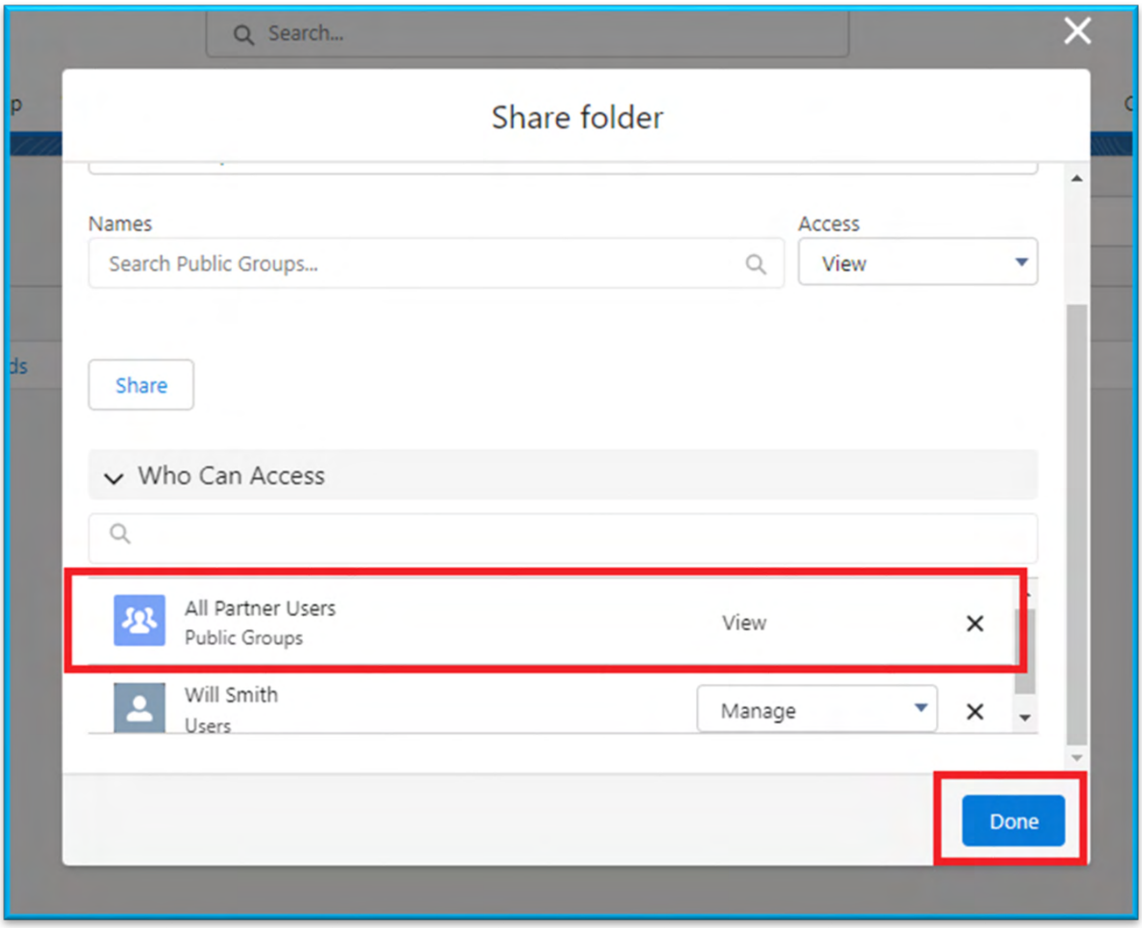
- After adding the access, click on 'Done' to finish.



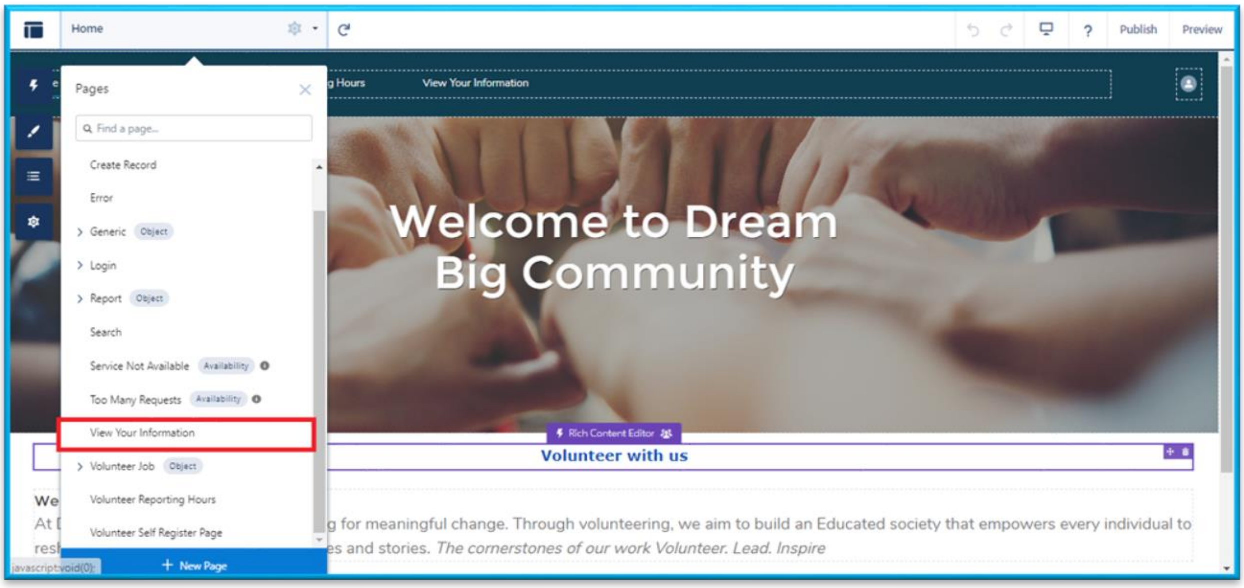
- Repeat the same steps for dashboard as well.



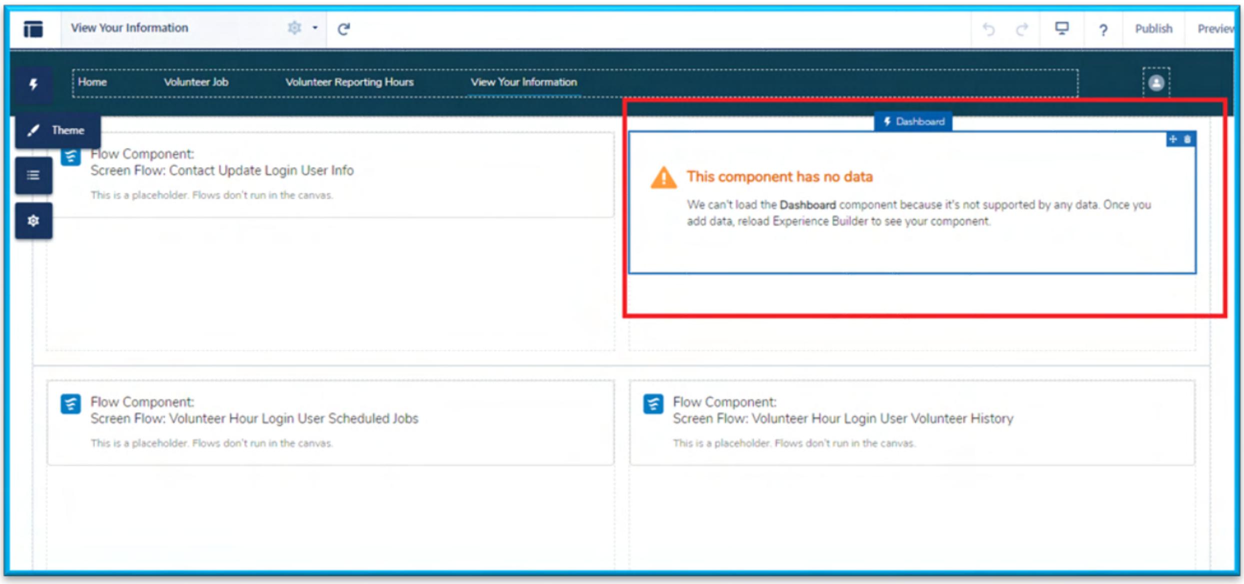




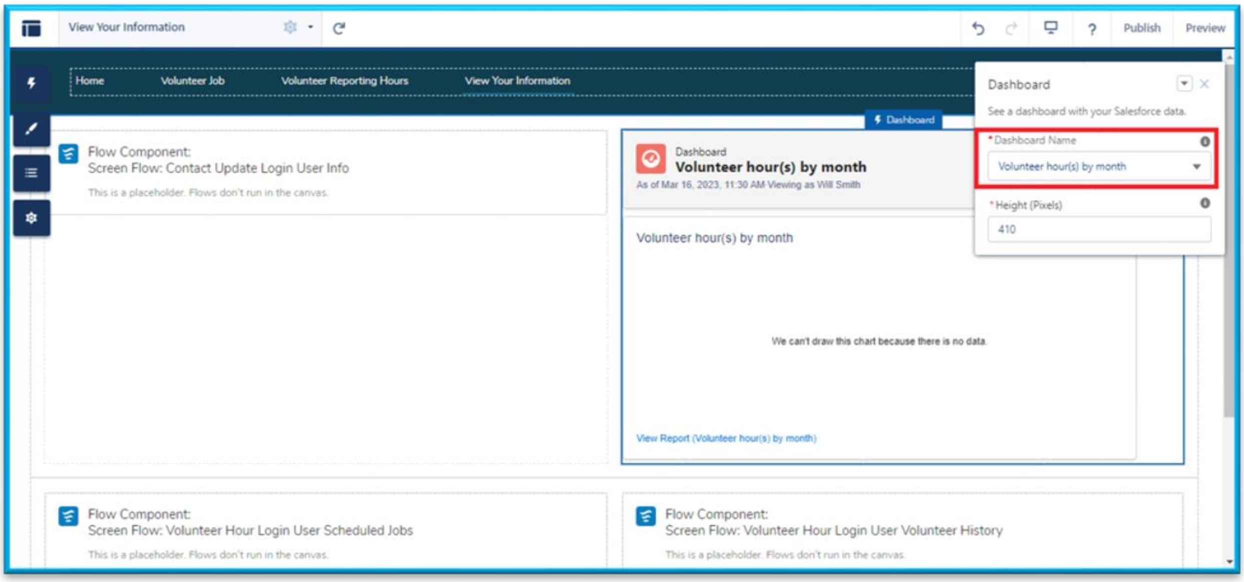
- Go to Volunteer self-service portal in builder mode and click on the 'View your information' page.



- Select the ‘Dashboard’ component.



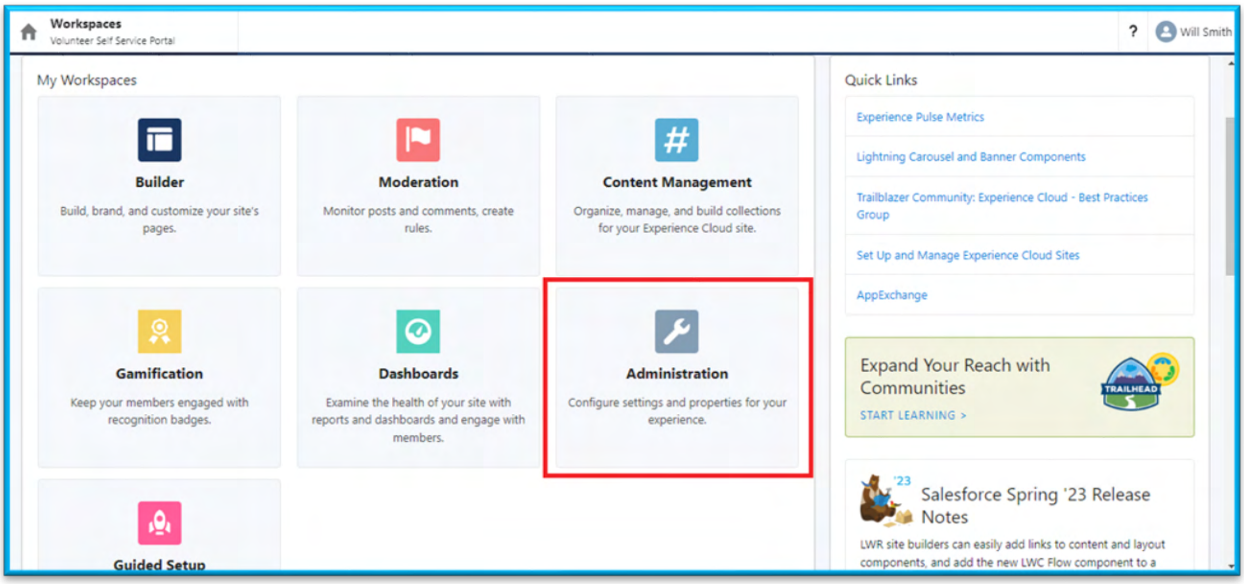
- Add the “Volunteer hour(s) by month” dashboard and publish the site.



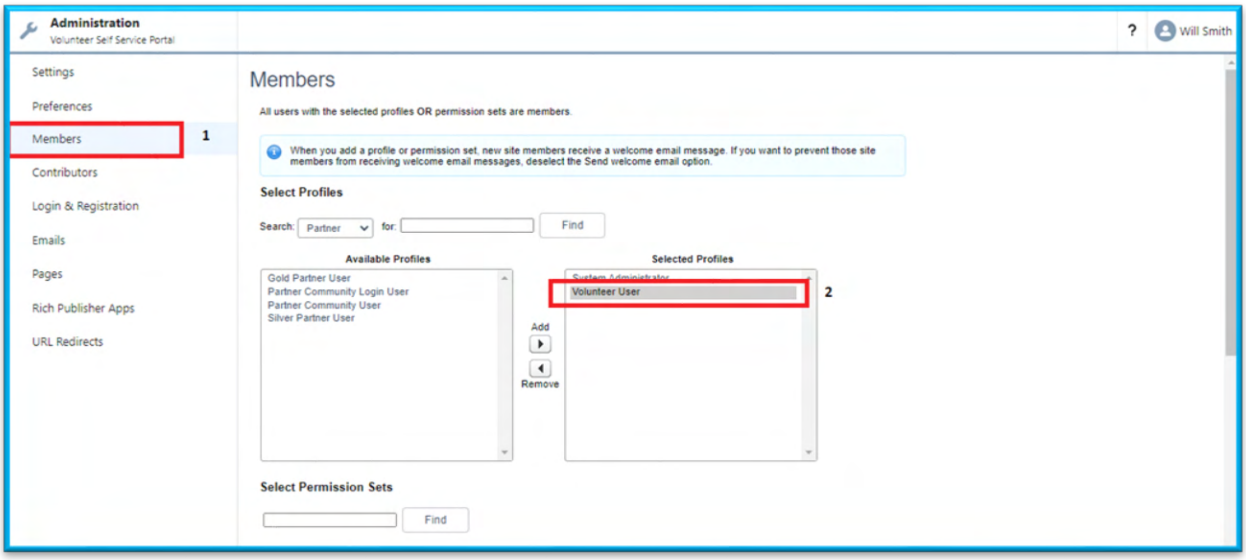
2.6. Add profiles and guest user permissions for the portal

- Go to the 'Administration'. In the 'Members' section, select the Volunteer user profile under 'Available Profiles' and move it to 'Selected Profiles'.

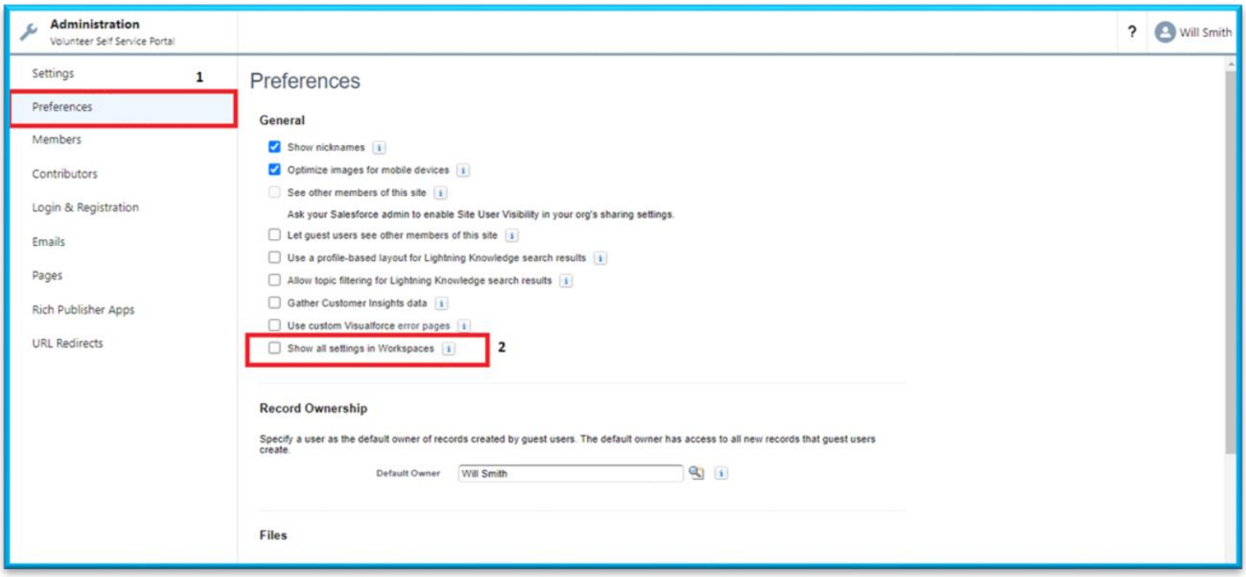
- Click on the Administration.



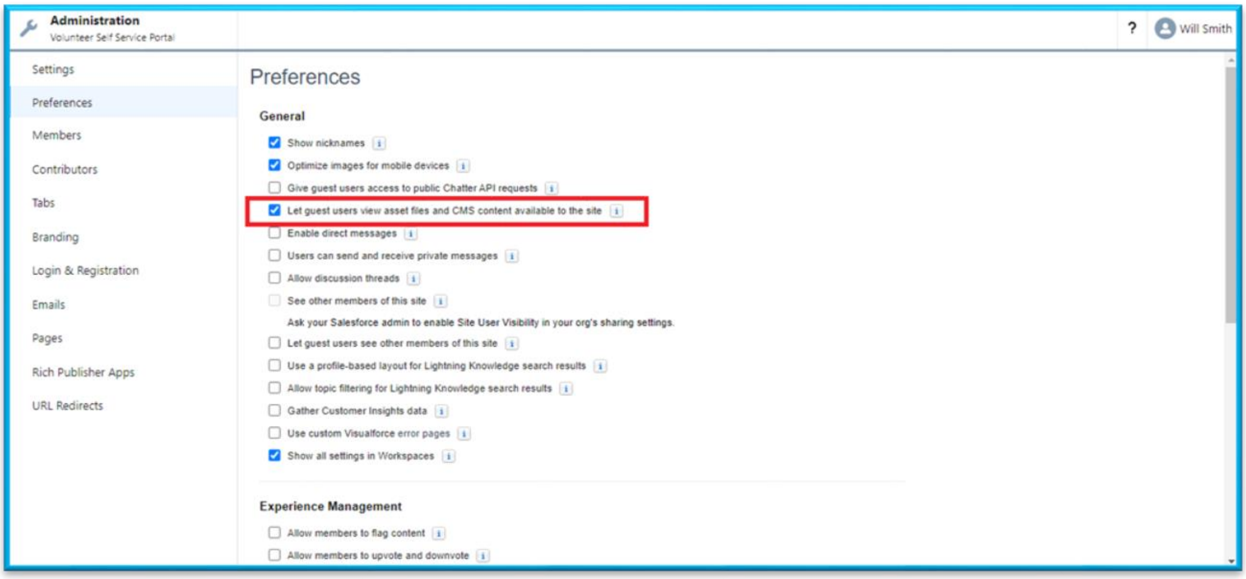
- Click on the ‘Members’. Select the Volunteer user profile under 'Available Profiles' and move it to 'Selected Profiles' and click on ‘Save’.



- Click on the ‘Preferences’. Select the checkbox “Show all settings in Workspaces” and click on ‘Save’.

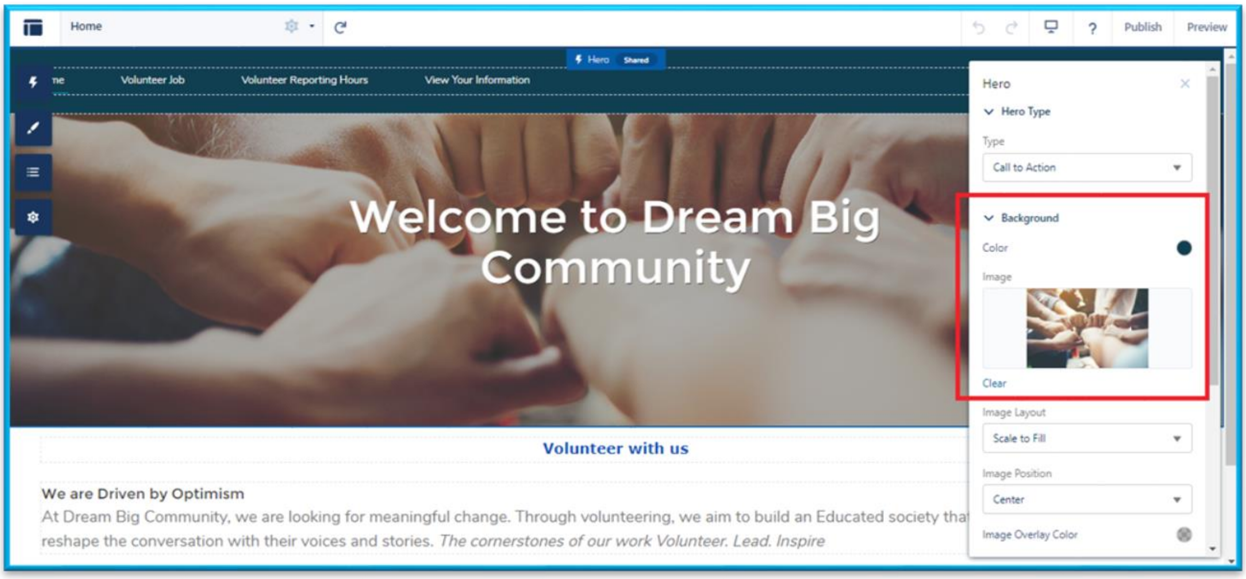


- Now select the checkbox “Let guest users view asset files and CMS content available to the site” and click on ‘Save’.



2.7. Change the Site’s Branding

- To add a background image to the home screen, open the site in builder mode and click on the background image. This will open a Hero component box. Under the background section, replace the existing image with your own.


Home
Publish
Preview
Hero Shared
Volunteer Job
Volunteer Reporting Hours
View Your Information
Welcome to Dream Big Community
Volunteer with us
We are Driven by Optimism
At Dream Big Community, we are looking for meaningful change. Through volunteering, we aim to build an Educated society tha
reshape the conversation with their voices and stories. The cornerstones of our work Volunteer. Lead. Inspire
Hero
Hero Type
Type
Call to Action
Background
Color
Image
Clear
Image Layout
Scale to Fill
Image Position
Center
Image Overlay Color