

1. TRIAL QuickStart Setup

If you are reading this page, we assume you have requested a 30-day trial of CommunityGrants. Most of the setup and configuration will have been completed in the back-end of your Trial organization, but there are a few things that you will need to do to get the public portal up and working.



1. Activate Sites Portal

1. Go to Setup
2. On the LEFT navigation area, find BUILD, and click on **Develop**
3. Click on **Sites**
4. Register the default Force.com domain. This domain has been set up for all Trial organizations. Once you convert to a Subscriber, you will have the opportunity to select and register your own domain. The default domain URL looks something like this: <http://gmstrialforceportal-14079721a50.force.com> where the alpha-numeric digits are generated automatically for the Trial organization.
5. When you are ready to make your site public, click **Activate on the Site Details page**. You can also activate your site from the **Site Edit and Sites pages**.

2. Configure Custom Settings

1. Go to Setup
2. On the LEFT navigation area, find BUILD, and click on Develop
3. Click on Custom Settings
4. There will be a Custom Settings record called **GMS Settings**. Under Actions, click the **Manage** link. Click **Edit** to make any changes to the Custom Setting fields. The screen should look something like this:

A screenshot of the Salesforce Custom Setting page for "GMS Settings". The page has a header with "Custom Setting" and "GMS Settings", and a "Help for this Page" link. Below the header, there are two paragraphs of instructional text. A table of settings is displayed with columns for the setting name, its value, and an edit icon. The settings include "Location" (CommunityGrants (TSO)), "Funding App Description Char Limit" (200), "Funding App Title Char Limit" (50), "Limit to Single Fiscal Year Application" (checkbox), "PortalAccountOwner" (admin@grant.com), "Portal Groups Admin ID" (005i0000001MxVk), "Portal Groups Admin" (admin@grant.com), "Portal Profile Id" (00ei0000000iudC), "Show Zero Weight Tabs" (checked), "2 Way Split" (80:20), "3 Way Split" (33:33:34), and "4 Way Split" (25:25:25:25). At the bottom, there is a "View" dropdown set to "All", a "Create New View" link, and a "New" button. A table at the very bottom shows columns for "Action", "Setup Owner" (Admin User), and "Location" (User). A "Chat" button is in the bottom right corner.

Custom Setting Field Explanations

- **Location:** Your Organization Name will appear here as a link to the Company Information record that was created when you registered for the Trial organization.
- **Funding App Title Char Limit:** You can change the default character limit for the Funding Application Title from 80 to whatever you would like.
- **PortalAccountOwner:** This field holds the username of the Grant Administrator in the form of an email; for example, admin@grant.com.
- **Portal Groups Admin:** If there is a different person who administers the portal groups administration, then their username would appear here.
- **Show Zero Weight Tabs:** This checkbox controls whether the Tabs on an evaluation will be shown or not. *Recommendation: Checked*
- **3 Way Split:** This field setting controls how 3-way splits will be divided for payments throughout the year. For example, 33:33:34 would be 3 equal payments.
- **Funding App Description Char Limit:** Controls the character limit for the Funding Application Description field.
- **Limit to Single Fiscal Year Application:** Checkbox controls whether an awardee can receive multiple awards or a single award during the same fiscal year.
- **Portal Groups Admin ID:**
- **Portal Profile Id:**
- **2 Way Split:** This field setting controls how 2-way splits will be divided for payments throughout the year. For example, 80:20 would be 2 payments where 80% of the award would be sent initially, and the remaining 20% later in the year.
- **4 Way Split:** This field setting controls how 4-way splits will be divided for payments throughout the year. For example, 25:25:25:25 would be 4 equal payments.

[Overview & QuickStart](#) >

2. Custom Labels

CommunityGrants has a very simple and generic Portal User Interface. The reason for this is so organizations can get up and running quickly, out-of-the-box, without having to create their own cascading style sheets (CSS).

HINT: You can override anything in Salesforce by using the Translation Workbench

I. To configure the CommunityGrants portal interface with your logos and links, follow the instructions below to change the Custom Labels:

1. To replace the logo placeholder, go to Documents Tab and search for CommunityGrants folder.
2. Look for the "Org Site Logo" Document. DO NOT DELETE! Click on the "Org Site Logo" link
3. Click on the Replace Document button

 This Document is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Document Detail		Edit Properties	Delete	Replace Document	Email Document
Document Name	Org Site Logo				
Document Unique Name	Org_Site_Logo				
Namespace Prefix	Grant				
Installed Package	Grant				
Internal Use Only	☐				
Externally Available Image	☒				
Document Content Searchable	☐				
Folder	CommunityGrants				
Author					
File Extension	png				
MIME Type	image/png				
Size	15KB				
Description	141 x 72 size. Do not delete this image. Replace placeholder file with your own company logo.				
Keywords					
Image					

1. Click on the Replace Document button

4. Follow steps to upload new image file of logo

 Replace
Org Site Logo

1. Select the File

☒ Enter the path of the file or click browse to find the file.

File to upload  [Choose File](#) No file chosen

Or:

☐ Create a reference link to the file. Enter a file location that others can access.

Path/URL to reference

2. Click the "Replace Document" button

[Replace Document](#)

Click the Cancel button to cancel an in-progress upload

[Cancel](#)

II. To replace the two links or the navigation on the portal with those of your choosing, follow the instructions below:

The screenshot shows the Salesforce Community Grants interface. The top navigation bar includes links for Home, Constituents, Contacts, Funding Opportunities, Funding Applications, Application Evaluations, Funding Summaries, and CommunityG. A red arrow points to the 'Setup' link in the top right corner, labeled '1. Click the Setup link (in older interface, click Your Name-->Setup)'. The left sidebar contains a 'Force.com Home' section and an 'Administer' section. A red arrow points to the 'Custom Labels' link under the 'Build' section, labeled '2. Click Create section, then click Custom Labels'. The main content area displays a list of custom labels. A red arrow points to the 'Another_Org_Name' label, labeled '3. Click this custom label'. Below the list, the 'Custom Label Detail' for 'Another_Org_Name (Managed)' is shown. A red arrow points to the 'Override' button at the bottom, labeled 'To override the Custom Label, click this button'.

Community Grants

Search...

George Schoemaker Setup Help & Training

Home Constituents Contacts Funding Opportunities Funding Applications Application Evaluations Funding Summaries CommunityG

Expand All | Collapse All

Quick Find

Force.com Home

Administer

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management *New!*
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps

Build

- Customize
- Create
 - Apps
 - Custom Labels
 - Objects
 - Packages
 - Report Types

All

Custom Labels are custom text values, up to 1,000 characters, that can be accessed from Apex Classes or Visualforce Pages organization, these labels can then be translated into any of the languages salesforce.com supports. This allows developers to for example, help text or error messages - in their native language. You can create up to 5,000 custom labels.

View: All Create New View

A B C D E F G H I

New Custom Label

Action	Name	Categories	Short Description
	Another_Org_Name		Another Org Name
	Another_Website_URL		Another Website URL
	Apex_CreateTransactionCon_Error_No_Artist_available	Apex, Error	Apex:CreateTransactionCon:Error:No #
	Apex_CreateTransactionCon_Error_No_Collector_available	Apex, Error	Apex:CreateTransactionCon:Error:No C available
	Apex_CreateTransactionCon_Error_No_Studio_available	Apex, Error	Apex:CreateTransactionCon:Error:No S
	Apex_CreateTransactionCon_Message_Invoice_Items_Selected	Apex, Message	Apex:CreateTransactionCon:Message: Selected
	Apex_CreateTransactionCon_Message_No_Item_available	Apex, Message	Apex:CreateTransactionCon:Message: selected
	Apex_CreateTransactionCon_Message_Quote_Items_selected	Apex, Message	Apex:CreateTransactionCon:Message: selected
	Apex_SetPrimaryImageConExt_Error_MultipleSelected	Apex, Error	Apex:SetPrimaryImageConExt:Error:MultipleSelected
	Apex_SetPrimaryImageConExt_Error_None	Apex, Error	Apex:SetPrimaryImageConExt:Error:None

Custom Label

Another_Org_Name (Managed)

Printable View |

« Back to List: Custom Labels

This Custom Label is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Custom Label Detail

Short Description	Another Org Name	Name	Another_Org_Name
Language	English	Protected Component	✓
Namespace Prefix	Grant		
Installed Package	Grant		
Categories			
Value	Another Org Name		
Created By		Modified By	

To override the Custom Label, click this button

Translation

Another Org Name

Translation Edit

SaveCancel

Master Label Information

Master Label	<u>Another Org Name</u>	Master Label Language	English
Master Label Text	Another Org Name		

Translation Information

Enter the text to override the Custom Label

Language	English
Translation Text	Utah Dept of Heritage and Arts

SaveCancel

Repeat the above steps for the following Custom labels in this order:

1. Another Org Name
2. Another Website URL
3. Navigation 1
4. Navigation 2
5. Navigation 3
6. Navigation 4
7. Navigation 5
8. Portal Home Page Verbiage
9. Portal Home Welcome
10. Your Organization Name
11. Your Website URL