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FOODBANK HELPER v1.3

What it is

Foodbank Helper is a managed package application built on the Salesforce platform that allows food banks to do quick client intake through a single form that can be accessed from a desktop or a mobile device. Foodbank Helper leverages the Nonprofit Success Pack and its Household Account model to track client household information. The application is Lightning ready and can be used through Salesforce1. The instructions are written for Lightning users, however the application should work in Salesforce classic on a desktop as well.

HOW IT WORKS

The Foodbank Helper works by providing one simple intake form that allows users to create a brand new household with household members or edit an existing household with household members while recording a client visit at the same time. The form brings together information from multiple objects and allows the intake staff to quickly record the visit while keeping the household information accurate.

Installation guide

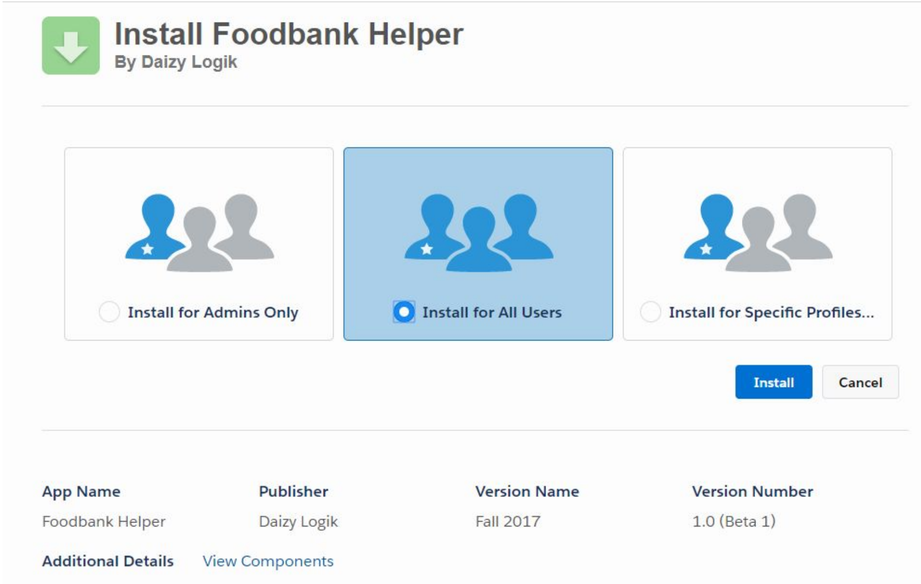
PREREQUISITES CHECKLIST

Before you install Foodbank Helper you should make sure the following prerequisites are met:

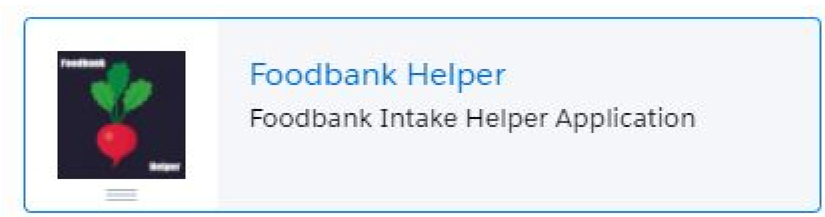
- Nonprofit Success Pack 3.x is installed.
- Household Account Model in enabled.

INSTALLATION STEPS

- Download Foodbank Helper from the AppExchange.
- Choose Install for All Users and click Install.



- Once the installation is complete look for the Foodbank Helper app



Setup Instructions

Foodbank Helper comes with some new tabs and custom fields as well as some functionality you'll need to be aware of.

Account Fields and Layout

We have added a few client intake related custom fields to Account that will allow you to track information about the household members' visits to the food bank as well as the household composition.

Below is a list of the Account fields that come with Foodbank Helper:

- First Visit
- Last Visit
- Last Date Received Baby Food
- Last Date Received Baby Formula
- Last Date Received Diapers
- Number of Adults
- Number of Children

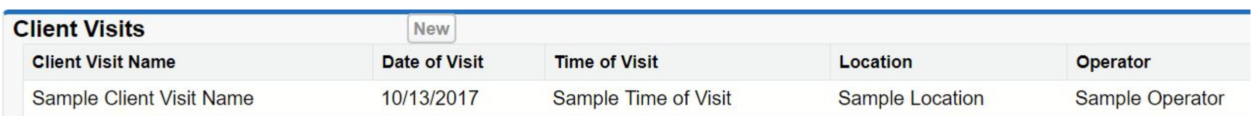
- Number of Infants
- Number of Seniors
- Visit Notes
- Staff Notes
- QR Code Client Household

To see these fields on the Household account you will need to edit the Household Account Layout to include the following Client Intake related fields.


Client Intake Information

Number of Adults	95,085	First Visit	10/13/2017
Number of Children	68,375	Last Visit	10/13/2017
Number of Infants	65,070	Staff Notes	Sample Staff Notes
Number of Seniors	76,303	Visit Notes	Sample Visit Notes

Next, add the Client Visits related list to the layout. This will show the client visits made by members of the household.


Client Visits New

Client Visit Name	Date of Visit	Time of Visit	Location	Operator
Sample Client Visit Name	10/13/2017	Sample Time of Visit	Sample Location	Sample Operator

If the "Record Client Visit" quick action does not show up on the Household Account Layout go ahead and add it to the layout from the Lightning quick actions. This will allow you to record a client visit for the current Household.

QR Code for Client Household

As of version 1.3 we have added the QR Code field to the Household Account so food banks can quickly scan the code to bring up the household record information in Salesforce.

QR Code Client Household

CONTACT FIELDS AND LAYOUT

We have added a few client intake related fields to Contact that will allow us to make calculations to determine the household composition and if household members qualify for certain types of foods. Edit the Contact Layout add these fields to it.

- Age
- Age at Intake
- Classification
- Estimated Birthdate

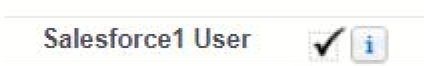
REPORTS

As of version 1.3 Foodbank Helper comes with a few out of the box reports that can be used as a starting point to craft custom reports for each organization. These reports are organized under the Foodbank Helper Reports folder.

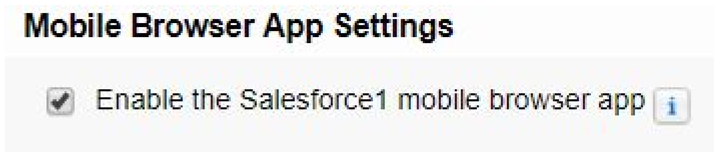
SALESFORCE 1 CONSIDERATIONS

If you plan to do intake using Foodbank Helper from Salesforce1, make sure the following are configured:

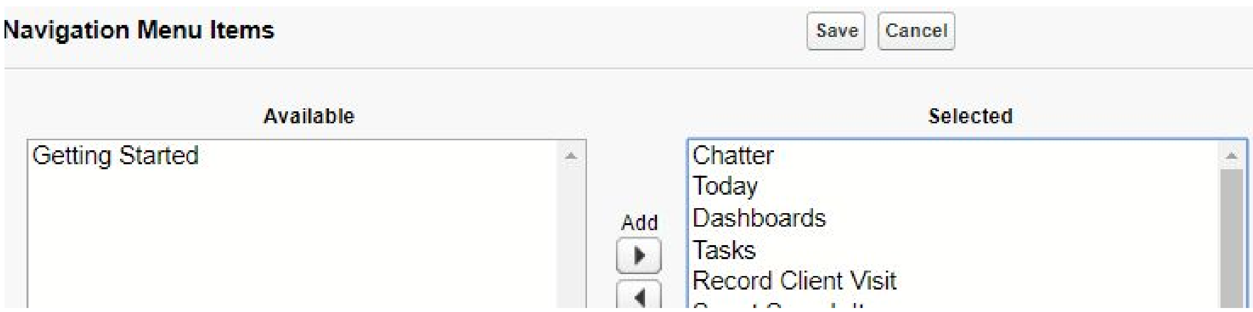
- Salesforce1 User checkbox is checked for the user.



- Under Setup -> Salesforce1 Settings make sure Enable the Salesforce1 mobile browser app is checked.



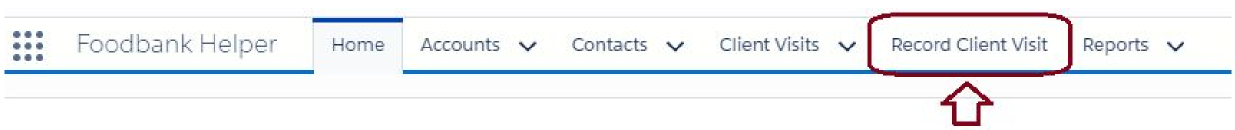
- Under Setup -> Salesforce1 -> Salesforce1 Navigation make sure Record Client Visit is selected for the Mobile Navigation



Using the Application

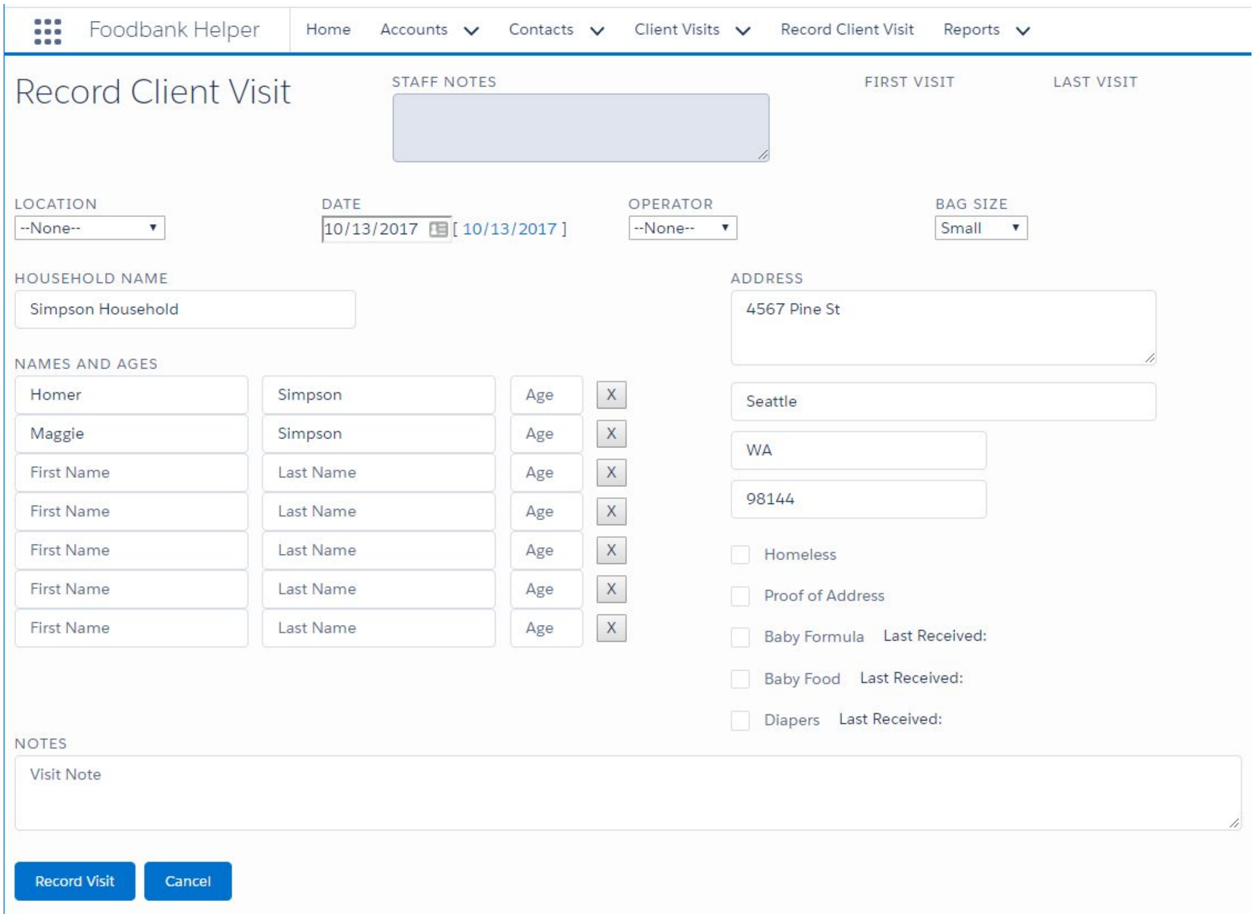
Recording a new visit for a new household

Use the Record Client Visit Tab to record a new client visit for a new household. Remember that this form will create a new household and record the client visit at the same time.



This will bring up the Intake form. When you are done filling in the information click Record Visit to save both the household information and the client visit information. Please note that:

- The Location and Operator fields will be "pinned" after recording the first visit and remembered when you return to the form.
- Staff Notes is a field on the Household Account that allows you to show notes staff considers important to see while doing intake for a client. They are read only on the form and can only be edited from the Household Account record.
- Visit Notes are notes collected during intake and they are cumulative.



RECORDING A NEW VISIT FOR AN EXISTING HOUSEHOLD

If you would like to record a new client visit for an existing household, search for the household and click the Record Client Visit button from the Household page. This will bring up the Record Client Visit page with the household member information pre-populated. You can make changes to the household composition and save the client visit by clicking Record Visit.

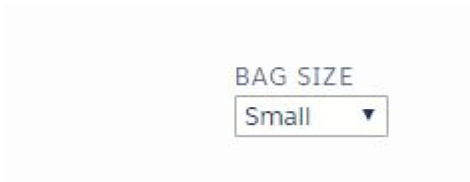
CONFIGURING CUSTOM METADATA TYPES

The application allows end users to configure some parameters for the Foodbank Helper. From Setup -> Quick Find, search for Custom Metadata Type. Click Manage Records to change the parameters.

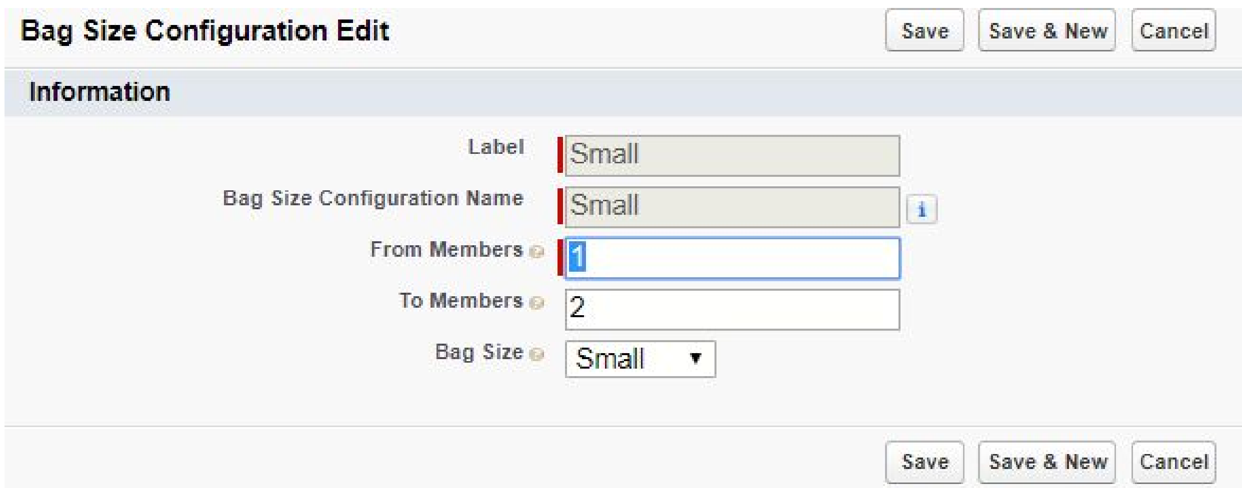
New Custom Metadata Type

Action	Label	Installed Package	Namespace Prefix	Visibility	Api Name	Record Size	Description
Manage Records	Bag Size Configuration	Foodbank Helper	dzfoodbnk	Public	dzfoodbnk__Bag_Size_Configuration__mdt	187	Allows to set the bag size based on the household members number.
Manage Records	Classification Configuration	Foodbank Helper	dzfoodbnk	Public	dzfoodbnk__Classification_Configuration__mdt	432	Stores the contact classification (infant, adult, etc.) based on age.
Manage Records	Warning Configuration	Foodbank Helper	dzfoodbnk	Public	dzfoodbnk__Warning_Configuration__mdt	442	Allows customers to configure the warning messages shown on the intake form when household members do not qualify for certain special products (such as baby products).

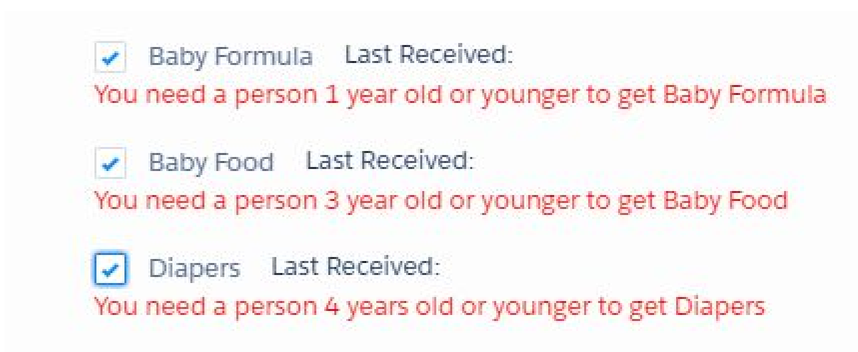
Bag Size Configuration :



This translates Household size to Bag size. We support Small, Medium and Large bag sizes. The values come preconfigured but can be changed. For example, if a household has 1 or 2 members, that translates to a "Small" food bag, which is what the Intake Form will suggest. To change this, click Manage Records and then set the new value for the lower limit of the Household size.



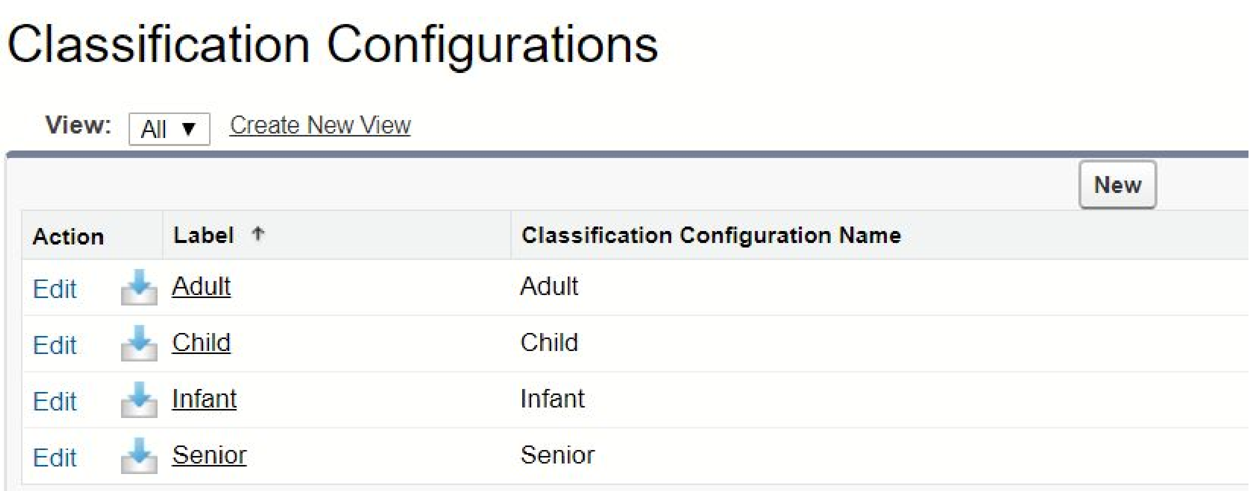
Warning Configuration :



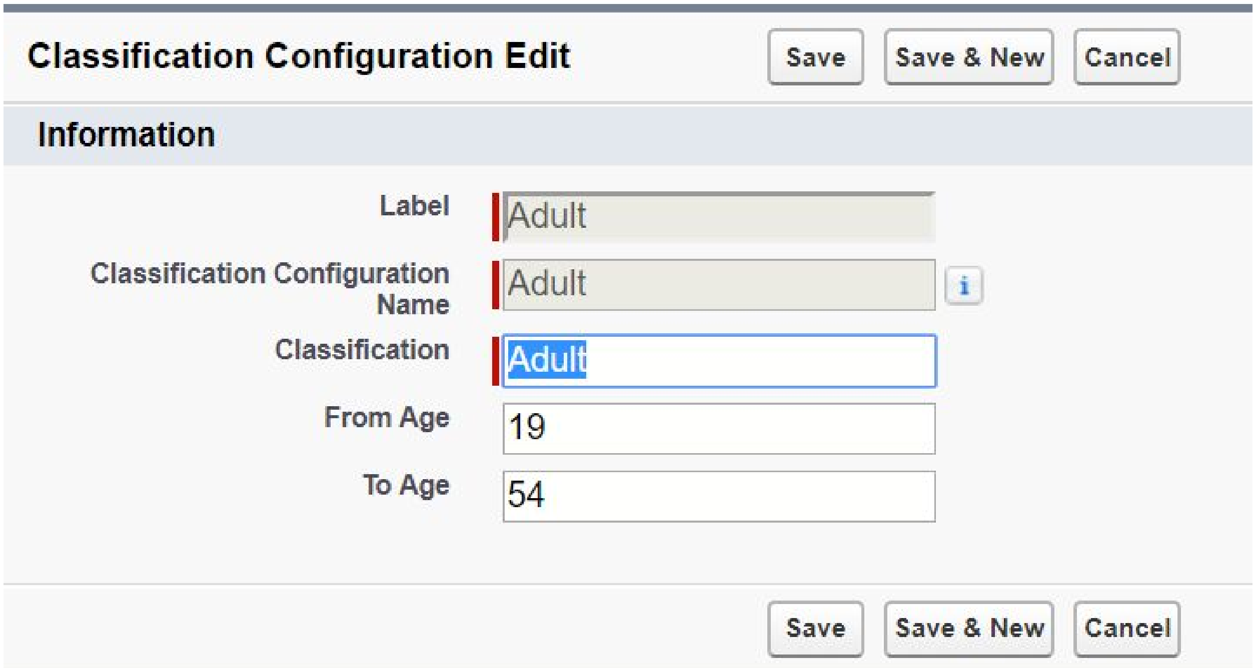
This can be used to configure the Age ranges and Warning messages that appear on the Intake form when household members do not qualify to receive certain products like formula or baby food. To change these values, click on Manage Records next to Warning Configuration and then Edit any one of the values.

Classification Configuration :

These settings can be used to configure the age ranges that will be used to determine if a client is an infant, child, adult or senior.



For example, if your organization classifies someone between ages 19 and 54 as an adult you can specify that using the From Age and To Age in the Adult setting.



UNDERSTANDING THE SCHEDULED PROCESSES

Foodbank Helper comes with two scheduled jobs that perform behind-the-scenes calculations.

CalculateHouseholdCompositionBatch : This job runs nightly to calculate the household composition. Based on the Age of the Contacts in a Household it will update the Number of Infants, Children, Adults and Seniors in the Household.

CalculateFirstVisitBatch : This job runs nightly to calculate and set certain attributes on the client visits made by people in a household. These attributes can be used to report on the client visits.

- First Visit : Marks the client visit if it was the client's first ever visit.
- First Visit In Month : Marks the client visit if it was the first visit in the MONTH it occurred.
- First Visit In CY : Marks the client visit if it was the first visit in the CALENDAR YEAR it occurred.
- First Visit In April FY : Marks the client visit if it was the first visit in the APRIL FISCAL YEAR it occurred. This can be used to report to funders using April Fiscal Year.
- First Visit In July FY : Marks the client visit if it was the first visit in the JULY FISCAL YEAR it occurred. This can be used to report to funders using July Fiscal Year.
- First Visit In October FY : Marks the client visit if it was the first visit in the OCTOBER FISCAL YEAR it occurred. This can be used to report to funders using October Fiscal Year.

The same job also sets a few attributes on the Household Account based on the client visits:

- Last Date Received Baby Food : Date when this household last received Baby Food.
- Last Date Received Baby Formula : Date when this household last received Baby Formula.
- Last Date Received Diapers : Date when this household last received Diapers.

Frequently Asked Questions

Q: I see warnings on the form telling me I am giving out products such as baby food to households that might not qualify. Why does the form allow me to save?

A: These are just warnings so you can make corrections if needed, but they will not prevent you from recording the visit.

Q: I created a new Household through the intake form and noticed that after recording the visit the name of the household was changed. Why?

A: The Nonprofit Success Pack can be configured to do auto-naming of households. If you have that setting enabled, the name of the household you entered through the form will be overwritten by the Nonprofit Success Pack auto-naming.