Christmas and Thanksgiving Form Entry Instructions
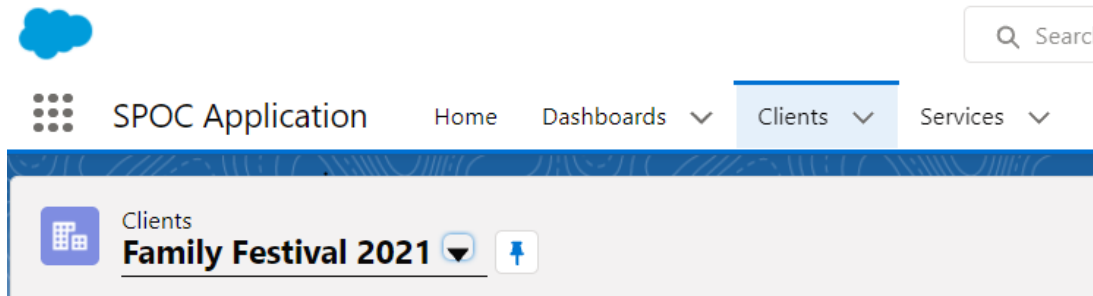
1. Go to: login.salesforce.com, enter username and password
   a. aaf@serve68.org
   b. Christmas21
   c. 1st time logging in, will ask for verification code. Text 970-231-6445 Stephanie will send you back your code
   d. Go to serve68.org/training for online version of this guide & video example for entry

   a. Check upper left corner to make sure you are in the SPOC Application.
   b. Click on the "Clients" tab.
   c. Click on drop down arrow on list view (to left of pin) and switch to Family Festival 2021
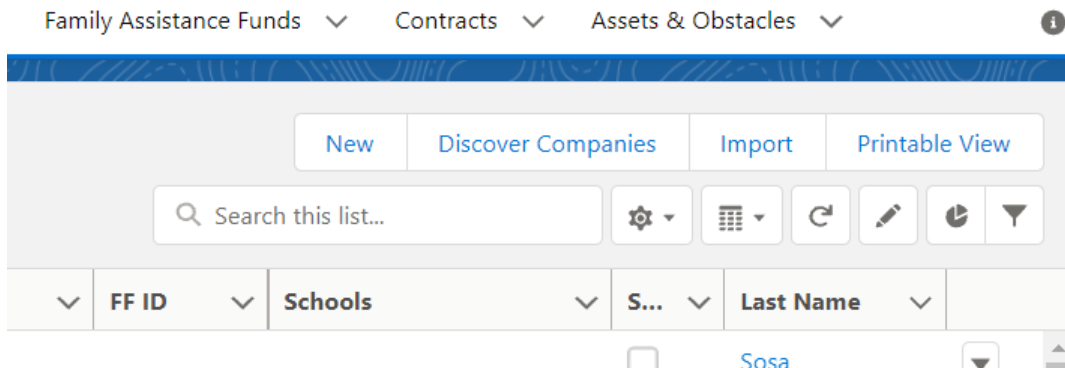
   a. Use the search bar on the right of the screen, search for first and last name, last name, or phone number.
   b. If the name appears, click on the blue hyperlinked name under that Account Name column or Last Name Column
   c. If no name appears, click the "New Button" and select "Family Festival 2021" from the list and click next.

4. **EXISTING PROFILE**

a.

i. When you are in an existing profile, the page layout will be on the Related List, click on "Details" to view

i. Skip the Check In Section (only for Connection Events)

ii. Families that have been nominated by a school counselor or organization will have sign up details on the program details tab. Ignore this column

iii. Update first the Festival location and FFID (see Festival Code Sheet to assign). Double click on the Pencil icon and it will open you up into "edit" mode

iv. Scroll to Adopt Information Section and verify contact information, update fields that have changed

v. Skip Agency Information Section

i. A bulk of data entry is updating gift requests. There are 8 child options, update however many are on the form.

ii. Enter from top row of the Christmas form into the column on the left. Enter clothing sizes, sheet size, or information from the Other Gift Ideas section into the "Gift Request – Child #" field

     iii. Click from drop downs the category for a toy (ie Action Figures) The Category you pick determines your toy options. Do this for each toy option circles on the form

     iv. There are 5 Toy Spaces on the Online Form, many families pick more than that or circle a whole category. Pick 5 different / multiple categories from the family's form for online data entry.

     v. Move to Child 2

     vi. When all children are entered hit SAVE at the bottom of the profile

     vii. Click back to Clients Tab in Salesforce to start over

5. NEW PROFILE

  a.

     i. If a name doesn't show up in your search, you can try phone number (in case of a typo) if no name still appears. Click the "New" Button. A dialogue box will open up with Record Type Options. Click the circle button next to "Family Festival 2021.

     ii. A new profile will open that is completely blank! Follow the instructions above for 4b-c. Update Festival location and ID, add in all Family Contact Information, Skip Agency section, Update Toy & Child section. Hit save.

Thanksgiving Forms

1. **All Thanksgiving Forms will be new profiles**
2. **Click New and Select "Thanksgiving 2021" from the list, click Next**
3. **Skip the Distribution Pick Up Section**
4. **Fill In Program Details: Thanksgiving Location, Thanksgiving Number, and pick the first listed child's school to put in the School field.**
5. **Fill in Family Information fields from the form**
6. **Hit Save & New, or if you are finished, select Save.**

Church Code List: Festival Location / Festival Code

Fort Collins
23Church – FC23
Antioch – FCAC   Thanksgiving: AC
Christ Fellowship – FCCF
City Park Church – FCCP   Thanksgiving: CPC
Faith – FCFC
LifePointe – FCLP
Mill City – FCMC
Overland Church – FCOC   Thanksgiving: OC
Southgate – FCSG
Summitview – FCSC
Timberline Church – FCTC   Thanksgiving: TC
The Grove – FCTG   Thanksgiving: TG
The Town – FCTT
Word of Life – FCWOL   Thanksgiving: WOL

Loveland
Derby Hill – DH

Windsor
Bethel Lutheran – WRBL
Foundations Windsor – WRFC
Living Rock – WRLR
Timberline Windsor - WRTC
Traverse Christian – WRTC

Greeley
Journey Christian Church – GRJC
Rez. Church – GRRC
Vineyard Church – GRVC

Fort Morgan, Alamosa, Wellington, Carr: TBD