BDO Network New User Guide

Last Updated: 6/1/2023

Summary:

This is a simulation of how you will use Salesforce to track business services and outcomes. This exercise is designed to develop your knowledge of the new system. You will enter a fake business and document the situations described in the directions below to the best of your ability.

If you are unsure of how to do something in this exercise, please make a note and submit your feedback to salesforceecondev@lisc.org. To request access to Salesforce complete the "User Request Form" online here.

Login Information:

- **Webpage:** https://lisc.force.com/BDOCommunity/s/login/
- **Username:** *your email address*
- **Password:** select a new password via the "LISC" email
- **Resources:** https://www.foc-network.org/BDO-network

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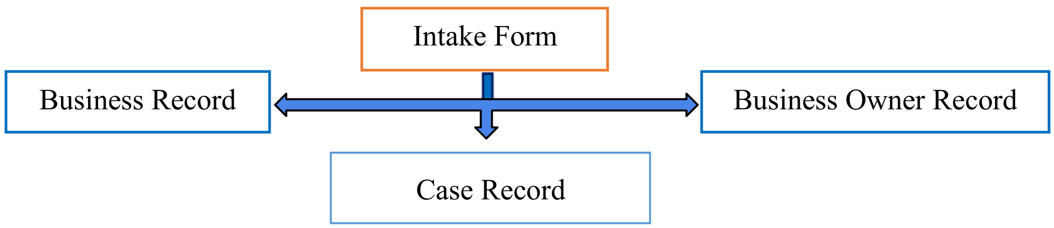
Intake of Business

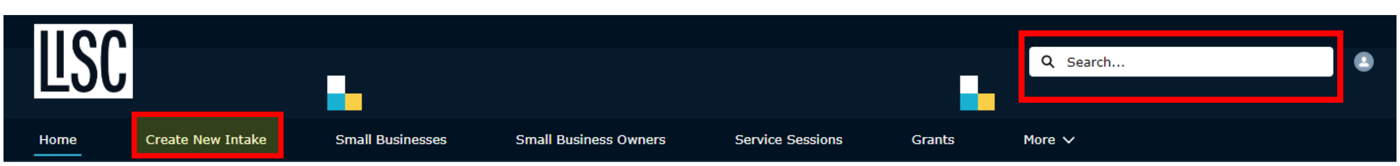
The Intake is the first and primary record for the business and includes baseline information about the business including owner information, contact information, location, revenue, industry and more. To edit any information submitted at Intake you will need to edit the business record and/or the business owner record. You can edit either record at any time as information about the business changes. After the Intake is created, you will document subsequent meetings with the business by creating Service Sessions (see the following section).

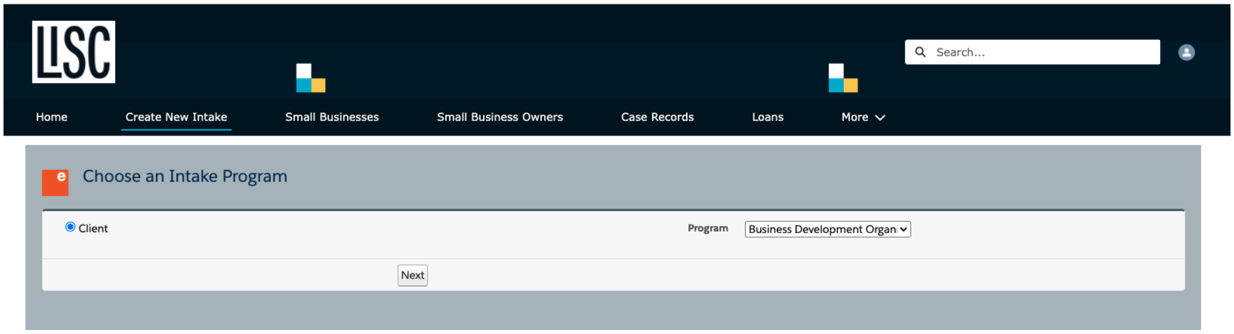


A. Begin by searching for your test business by name in the database to avoid creating duplicates. *Tip: Also search for the DBA name.*

B. Once you have verified your test business is not in the database, proceed to add your business by clicking on the "Create New Intake" tab.

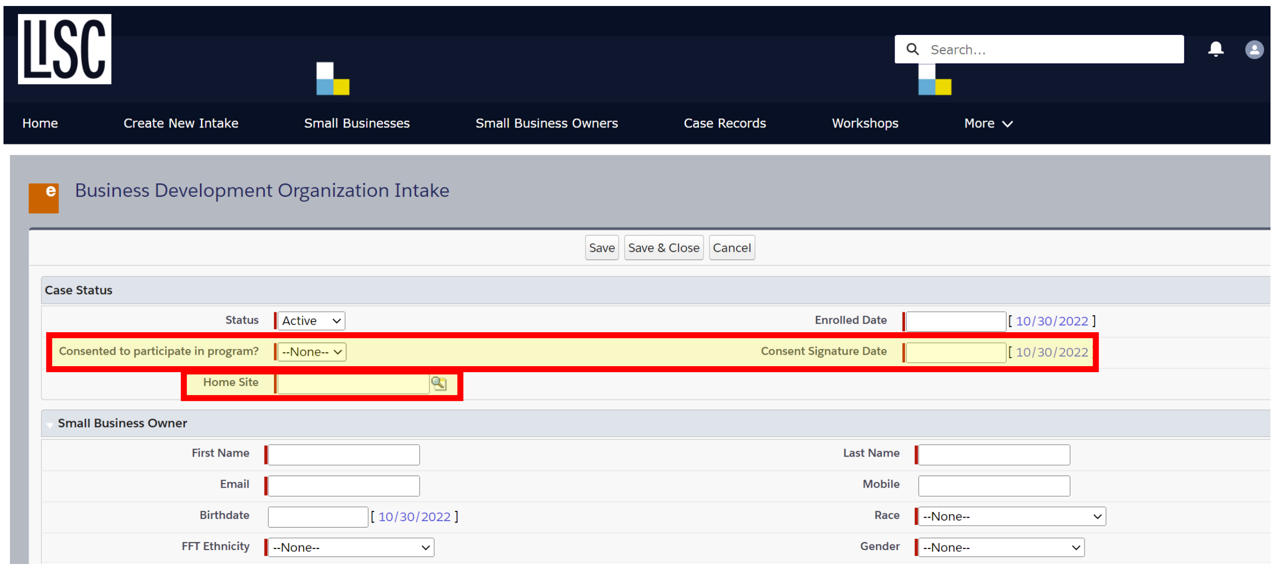
C. You will be directed to choose an intake program. Select Business Development Organization and click next





D. You will be directed to the Business Development Organization Intake. This form collects all the information necessary to create records for the small business, the small business owner, and the case. Fields with a red bar on the left are required information.

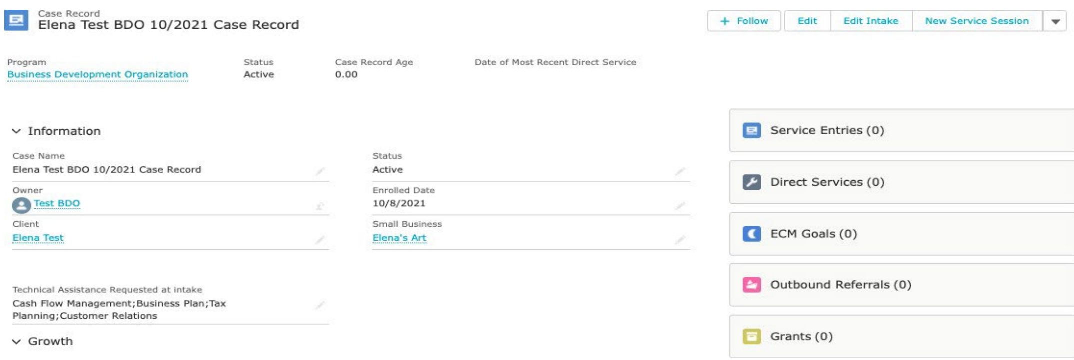
Note: *You will need to select your agency name as the "Home Site" by clicking on the magnifying glass and selecting your agency.*



E. You will find that LISC has two required fields that confirm the participant's consent to share their information with LISC. This is also followed with the participant's consent signature date.

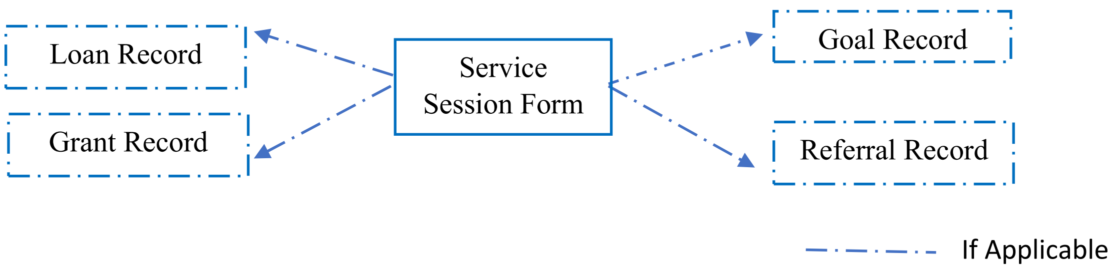
Note*: It is best practice to receive consent of data sharing from participants. LISC will not perform an audit of participant signatures unless a specific program requires it.*

F. When you save the intake, you will be directed to the Case Record page for the new small business you have created. The **Case Record** connects the small business and its owner to service sessions, loans, grants, goals and referrals all in one place.



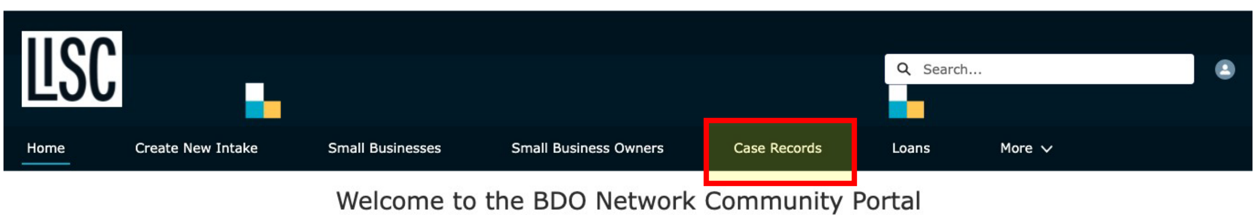
Service Sessions

The Service Sessions are used to document the subsequent meetings with the business and can be used to collect an array of different updates including goals, referrals, grants, and loans. To edit any information submitted during the session you will need to navigate to the business record and edit the applicable records.

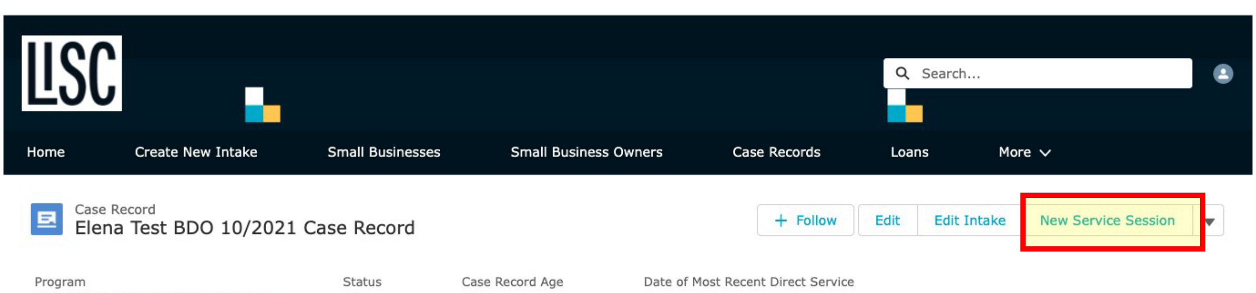


A. Document the activities below:

i. Search for the Business owner's case record either by clicking Case Records on the menu bar and choosing the case from the list OR by using the search function.



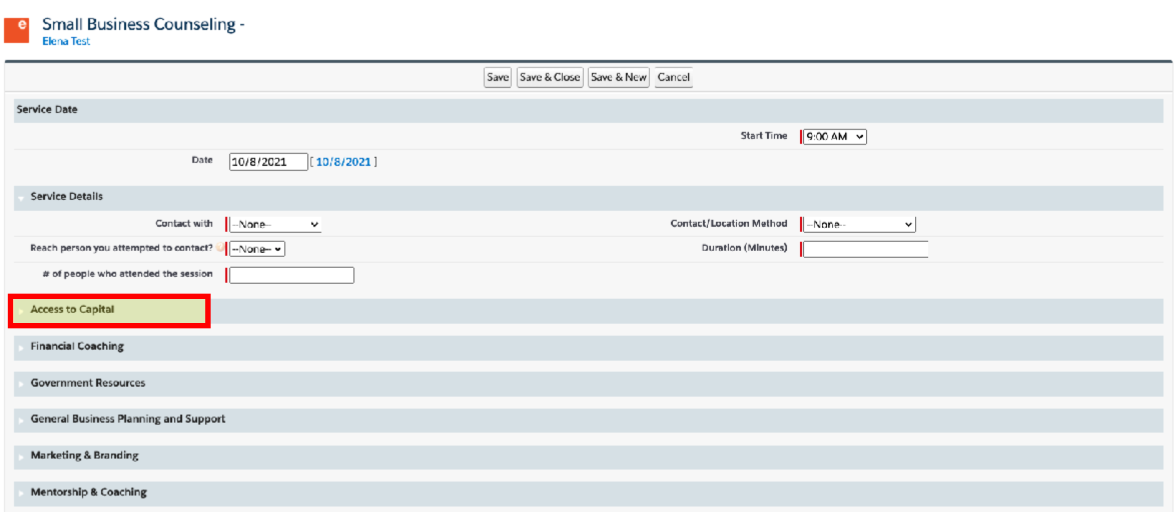
ii. Click on the "New Service Session" button to document a one-on-one session with the business owner. The business owner is interested in learning more about accessing capital via grants, e-commerce, creating a business plan, and growing the business (under Topics Discussed). In addition, the business owner has been approved for a $10,000 cash grant to support salaries and expansion.

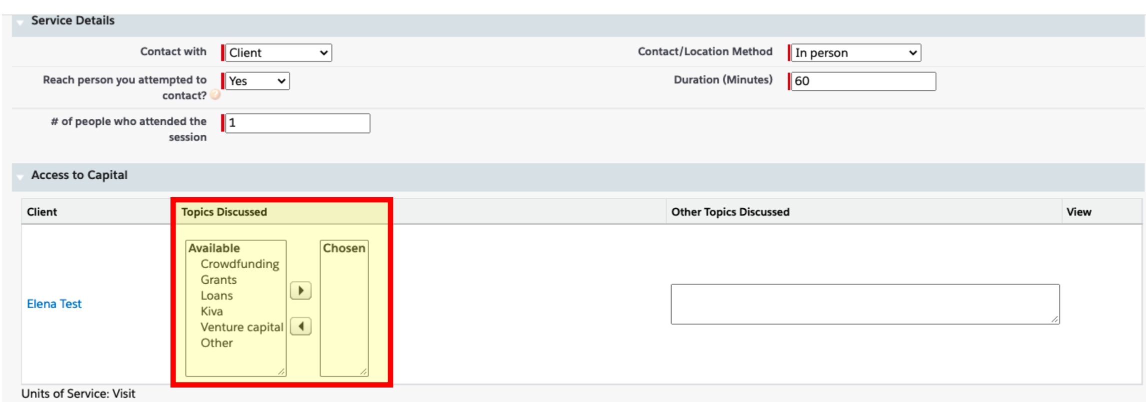


Note: *The Service Session form will open in a new window. Make sure you disable pop-up blocker for this webpage:* https://lisc.force.com/BDOCommunity/s/ *.*

iii. When you click on New Service Session the small business counseling screen will open. On this form you can enter information about the topics you discussed with the client. You can document the business' revenue growth and job creation. You can add or update any grants or loans the business has applied for or received. You can enter any goals you have set with the business owner. And you can document any referrals you have made for the client.

Note: *To see how entering topics discussed works, click on the downward facing arrow next to "Access to Capital".* ***Every Counseling Service Session should have at least one Topic assigned to it.***





iv. Under access to capital you can indicate any of the topics you discussed with your client by clicking on them and then clicking the rightward facing arrow to move the topic to the chosen list. You can also describe any topics discussed that are not on the list.

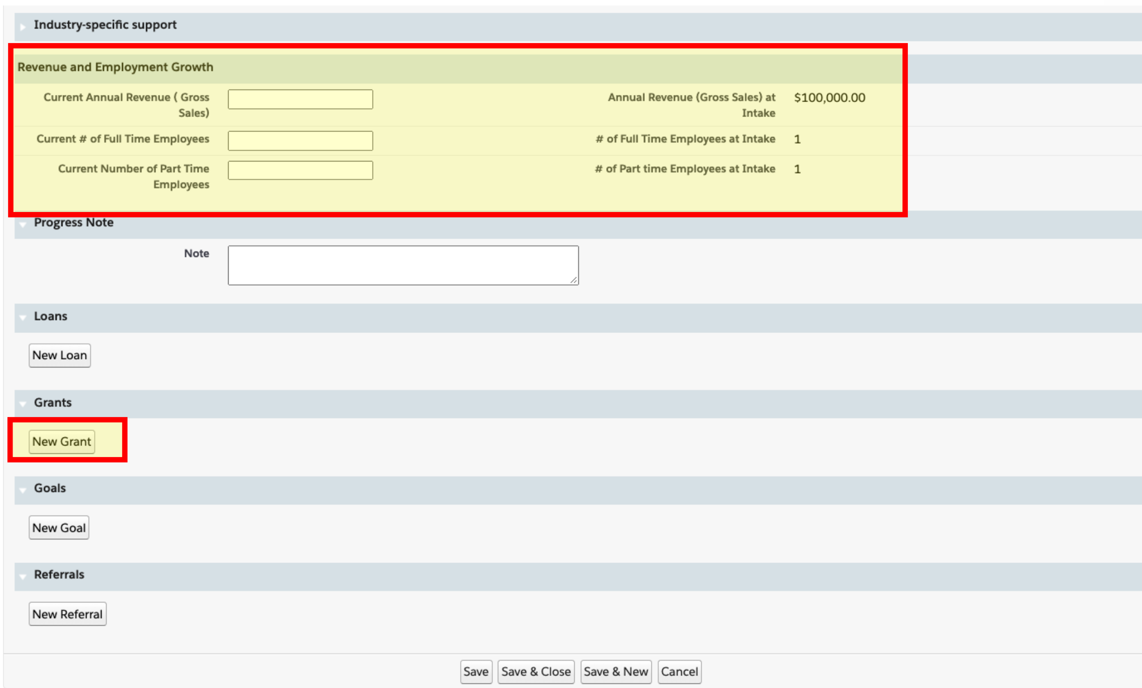
Note: *All of the sections from Access to Capital to Industry-specific support work like this. Enter as many topics as you discussed with the client in each service session (recommended topics per session: no more than 3).*

Disclaimer: *Salesforce auto-calculates duration per topic chosen with a field called:* ***Duration/Topic Split (minutes). Formula:*** *Duration of Session/# of topics chosen = Duration per topic chosen*

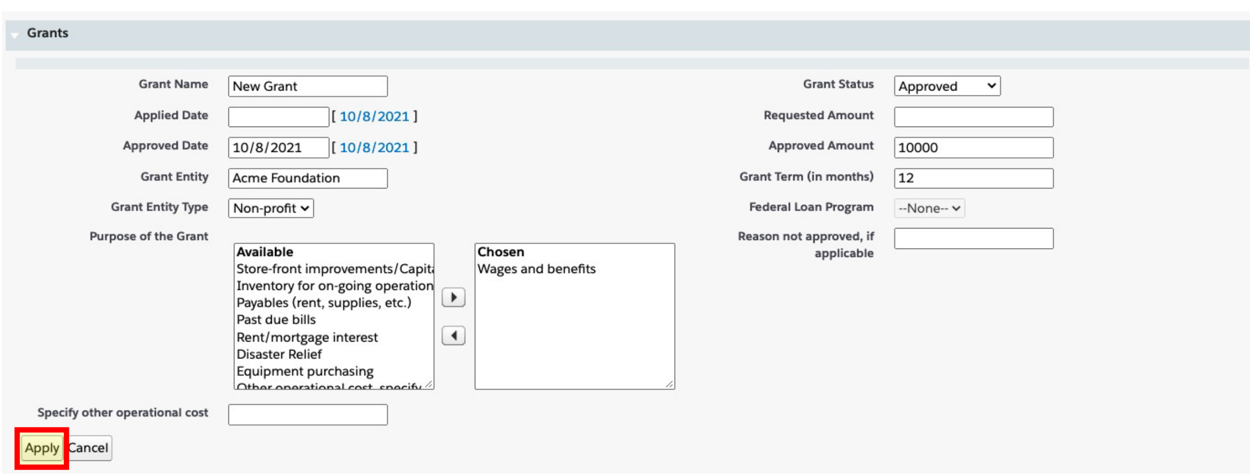
-Ex: *If 3 topics are chosen and the entire session was 60 minutes long, it will assign each topic 20* *minutes.*

v. Scroll down the screen until you come to the revenue and employment growth section. Here you can update the clients' current annual revenue and employee information to reflect any growth that has occurred. Immediately below the revenue and employment growth section you will find the place to enter any general notes about your session with the client.

vi. Click on the new grant button to enter the grant your client received.

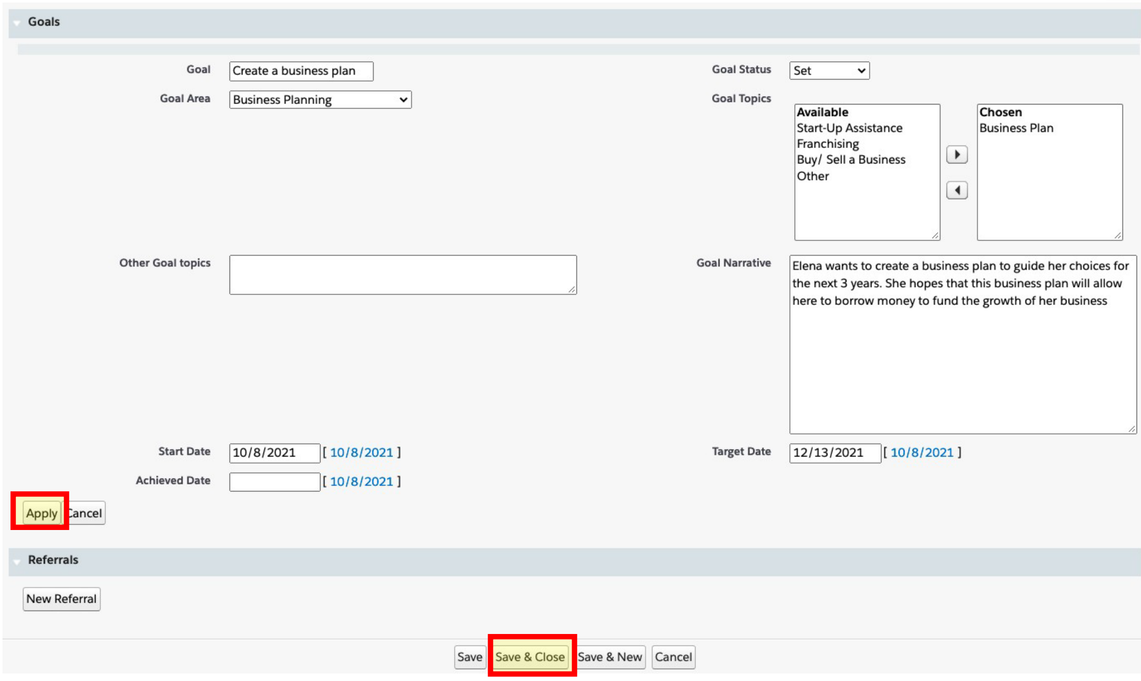


vii. Since they received the grant, you will enter an approved amount and an approved date. If you are recording a grant they have applied for you would enter an applied date and a requested amount. Once you complete entering the information click on the "Apply" button.



viii. The business owner has also decided they want to create a new business plan over the next few months. Click on the new goal button to open the goal entry section and describe the goal. The status of the goal should be set and you should include the date the goal was set and the target date for completing the business plan. Once you complete entering the information click on the “Apply” button.

ix. Click on save and close to record your service session. This will also create the grant that was approved and the record of the goal that you set with the client.

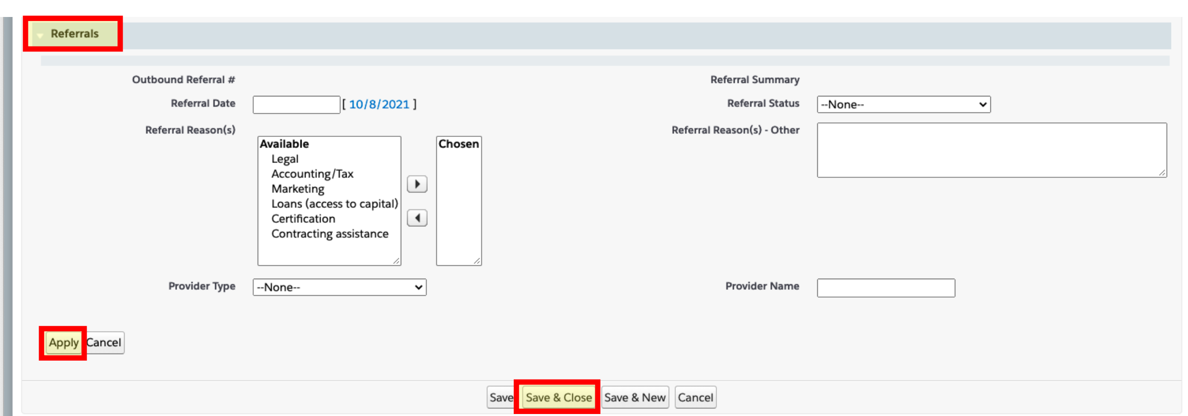


Next client update - 3/25/2021: The business owner (from step #1) contacts you and is interested in starting the process to certify the business as a minority and woman owned enterprise. You refer the business owner to a third-party to start the process. Document a new “Service Session”.

i. Navigate to the client’s Case Record by searching for the name.

ii. Click on the “New Service Session” button to document the phone call with the business owner and indicate a referral was made to the “Business Development Center” and is currently pending.

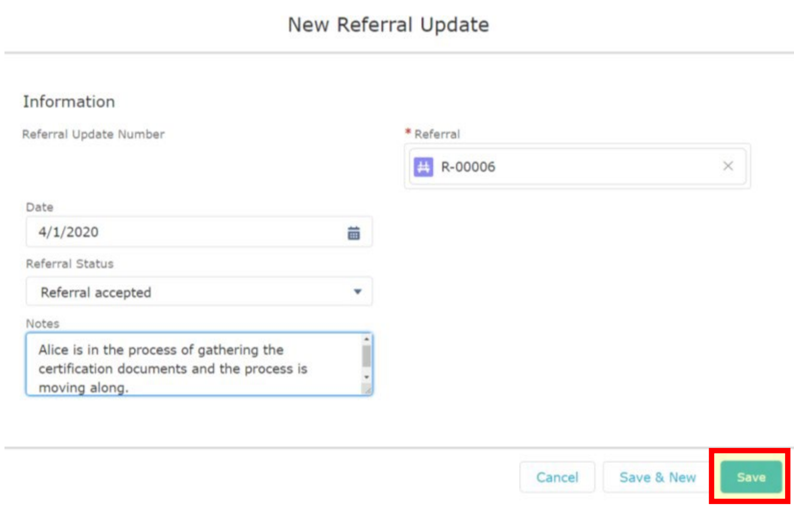
iii. After entering the service details, scroll down to the bottom of service session form and click the new referral button. Enter the referral information. Then click on save and close to record your service session and create the referral.



Next client update - 4/1/2021: You reached out to the "Business Development Center" provider to follow up on the referral you made. You were informed the referral was accepted and the business owner is gathering the required documentation to submit the paperwork.

iv. Update the referral status by navigating to the case record (search) and click on the referral number.

x. Click on the "Related" tab and click on the "New" button for a referral update.

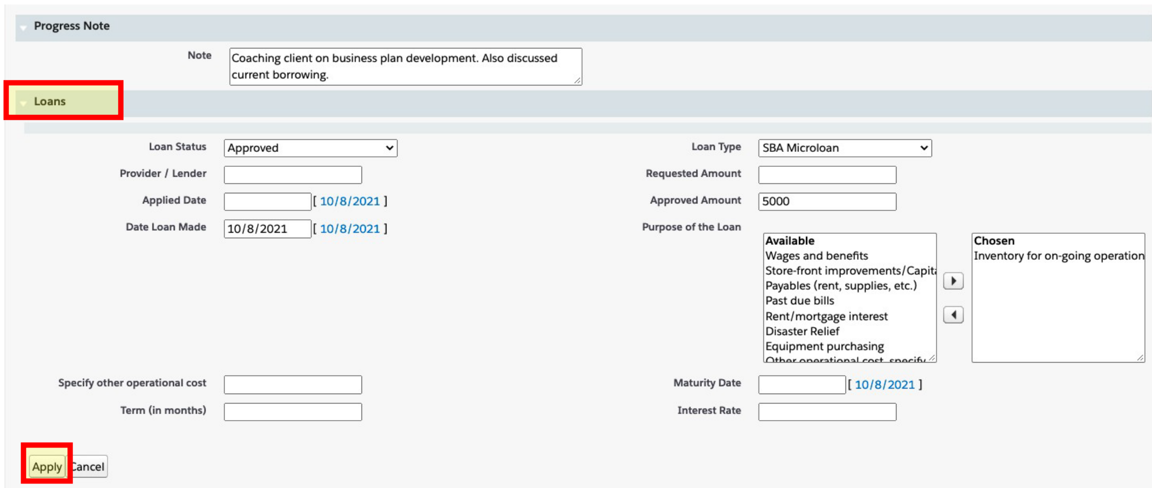


Next client update - 5/15/2021: During your monthly check-in with the business owner you learn the business was approved for a micro-loan ($5,000) to finance inventory for ongoing operations. Create a new "Service Session" to document the update.

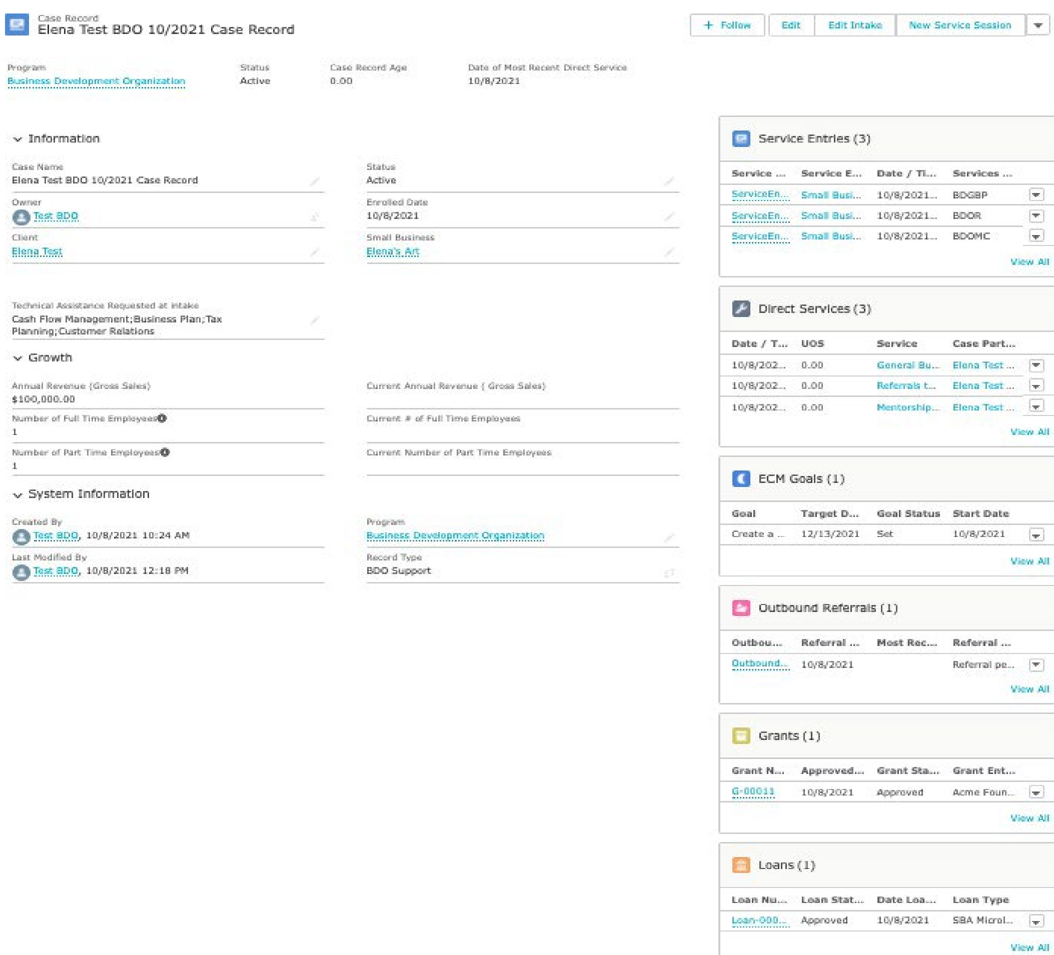
xi. Navigate to the client's Case Record by searching for the name.

xii. Click on the "New Service Session" button to document the phone call with the business owner and indicate a $5,000 loan was approved at Republic Community Bank to purchase inventory.

xiii. Enter the service details and scroll down the page to the loan section. Click on the new loan button. Enter the details about the loan and click apply. Click save and close to record the session and save the loan information.



When you're all done the client's Case Record will look similar to this:

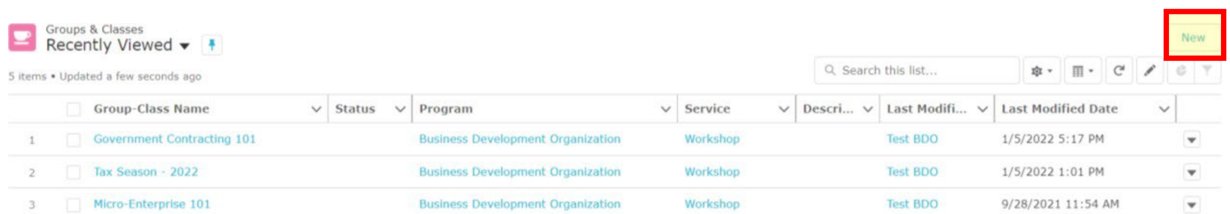


Workshops

Workshops are used to track number of attendees, workshop/training topics, training hours, etc. You can access the Workshops functionality from the home page ribbon. The functionality is driven by three main steps; 1) Schedule Sessions, 2) Add Clients, and 3) Edit Session (to take attendance). Below you will find an example on how to document a new "Marketing" training workshop.

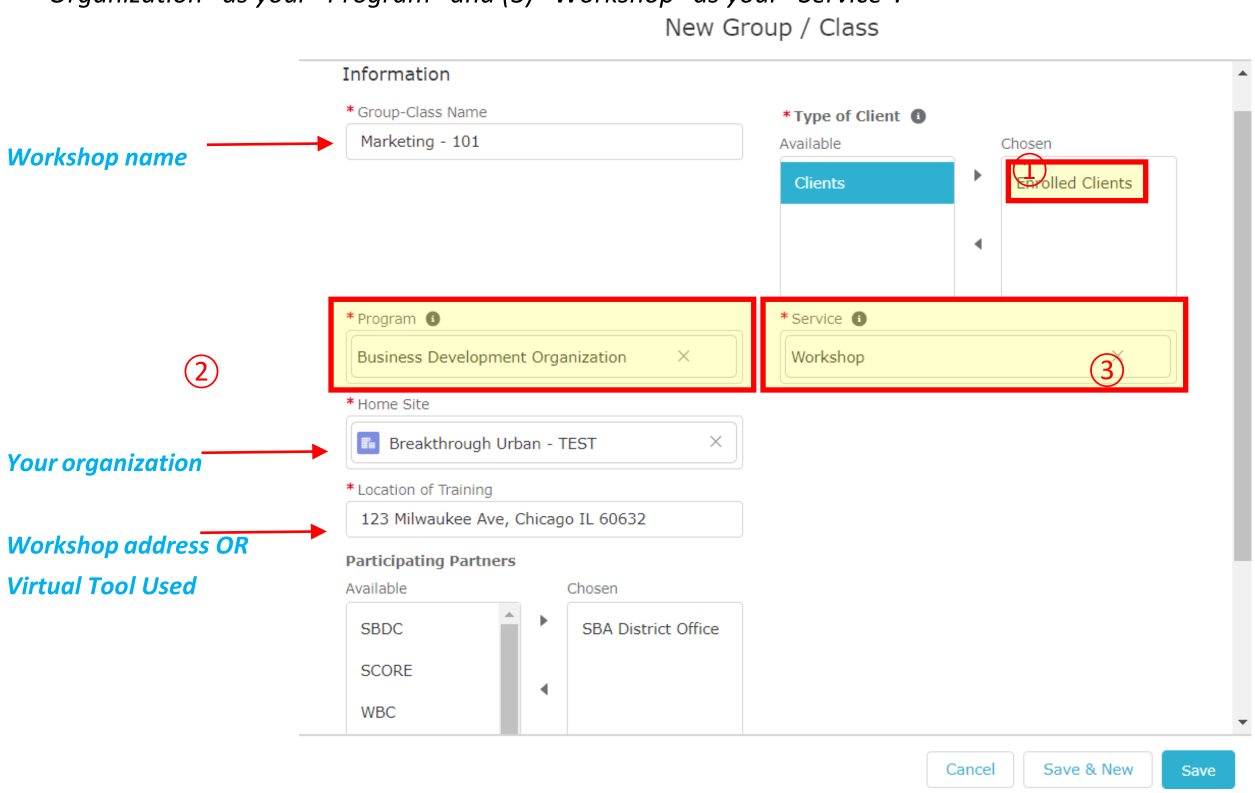
i. First click on the "Workshop" menu item from the top ribbon.

ii. On the next screen click on the "New" button from the upper right-hand.

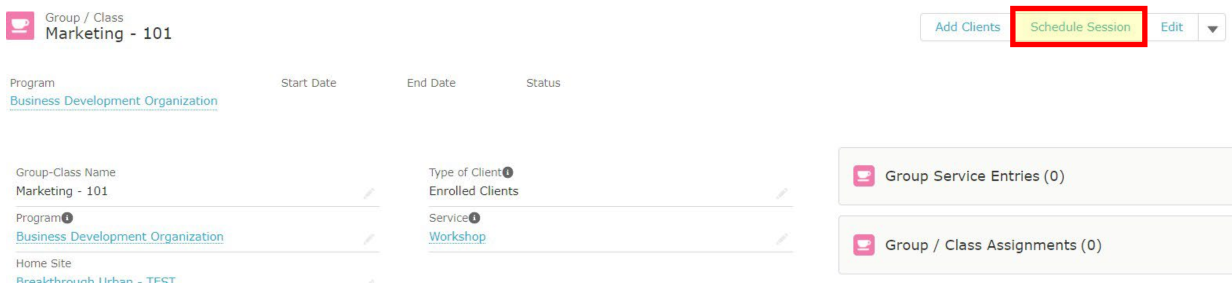


iii. Fill in the required group/class details in order to create the new workshop.

***Note:** Make sure to select (1) "Enrolled Clients" as your "Type of Client", (2) "Business Development Organization" as your "Program" and (3) "Workshop" as your "Service".*

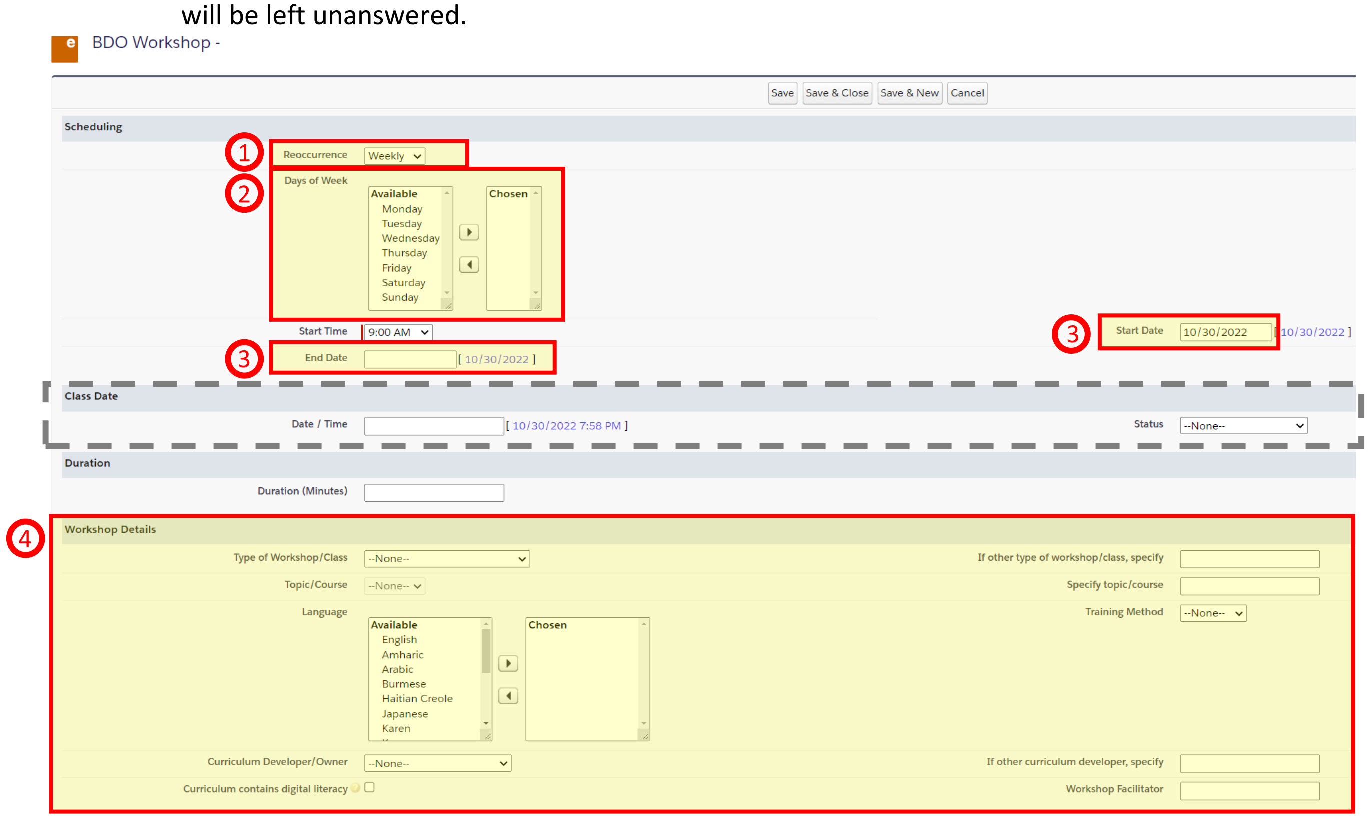


iv. Once your workshop is created click on the “Schedule Session” button to setup your workshop frequency. For this example, the “Marketing 101” workshop will be split into 4-60 minute sessions re-occurring weekly on Fridays.



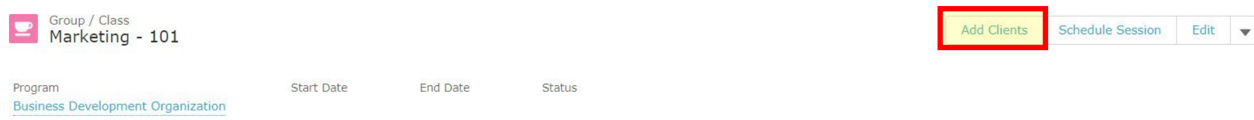
Step 1 - Schedule Sessions (series):

v. Select (1) “Weekly” as the “Reoccurrence”, for “Days of the week” select (2) “Friday” and indicate the workshop series (3) start and end date. **For now, skip for “Class Date” section since that is used to take attendance (dotted line).** Fill in the “Workshop Details” (4) **only** if the information is applicable for the entire series. For example, the workshop series will be a facilitated using a hybrid method of in-person/virtual and therefore the “Training Method” will be left unanswered.

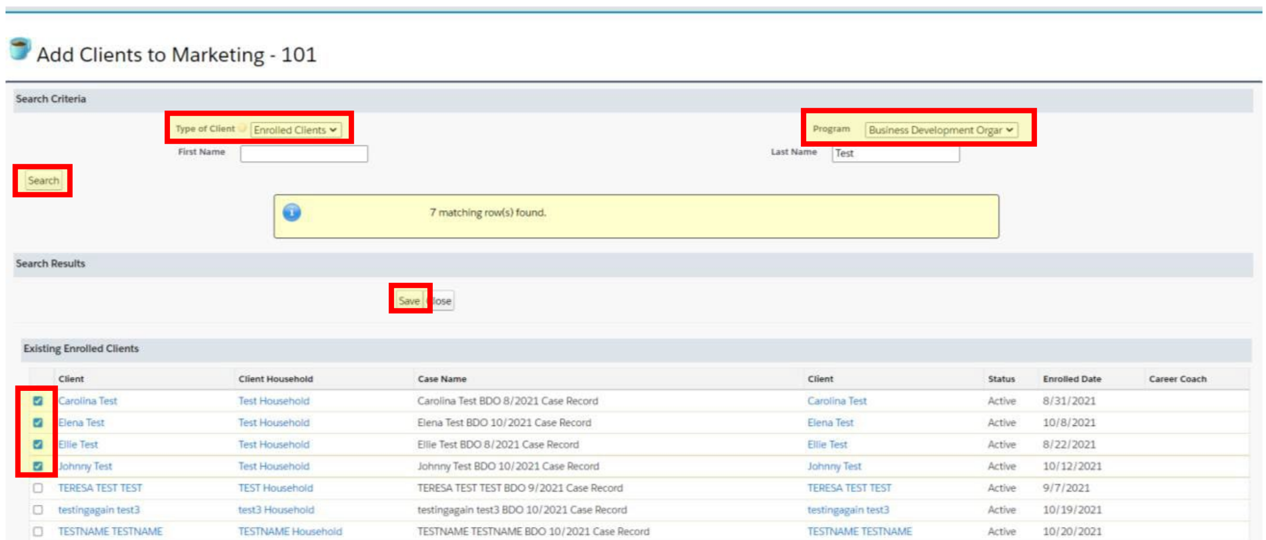


Step 2 - Add Clients:

vi. Once you Save & Close to schedule the session series, you can add your workshop attendees by clicking on the **"Add Clients"** button from your Group/Class record.



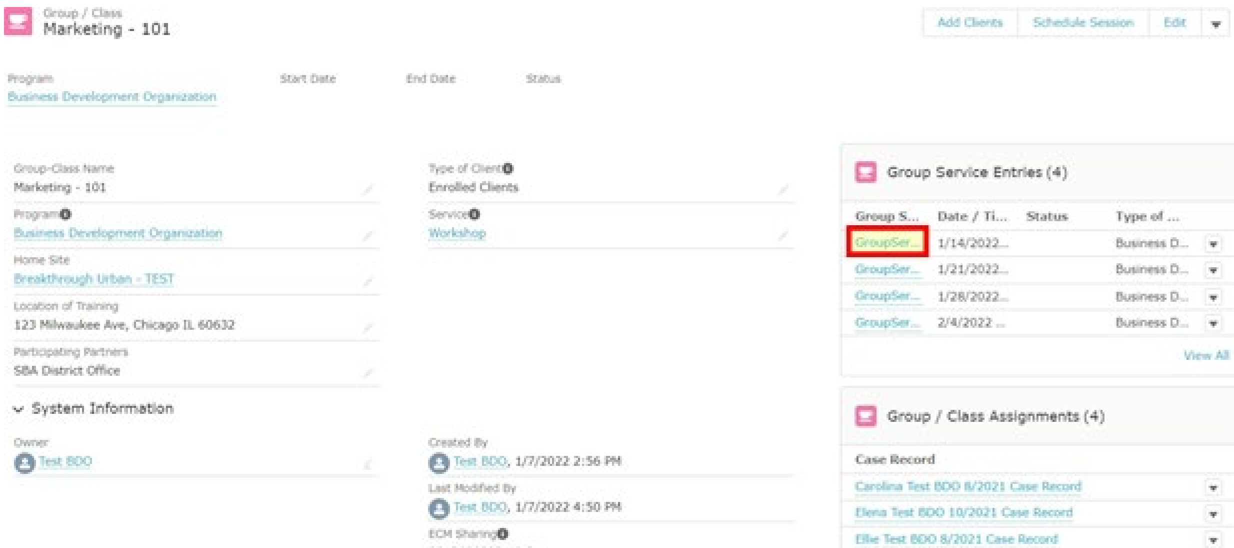
vii. On the next page you will need to search for your workshop attendees using the "Search Criteria" functionality. First select "Enrolled Clients" as your "Type of Client", next select "Business Development Organization" as the "Program" and input the client's first and last name, and lastly click on the "Search" button.



viii. Check-off the box next to the workshop attendee's name to add the client in the workshop and click on the "Save" button – repeat as needed. Once you have confirmation the workshop attendees were added click on the "Close" button.

Step 3 – Take Attendance (Edit Session):

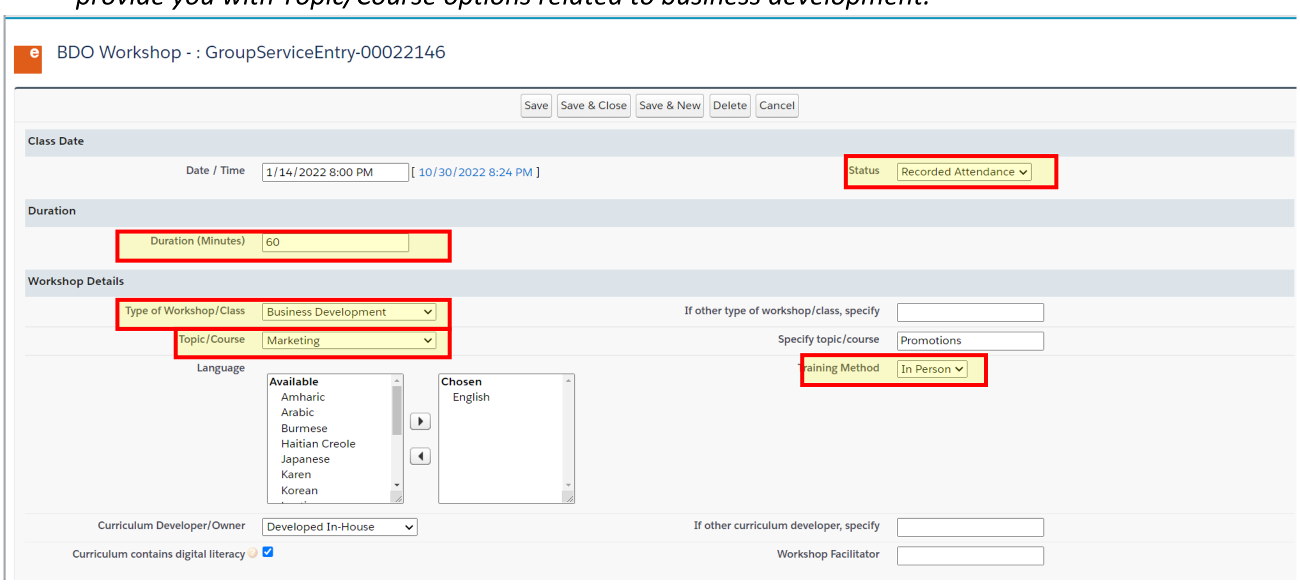
ix. Once you're ready to take attendance – navigate to your Group/Class record and click on the "Group Service Entry #" with the corresponding workshop date.



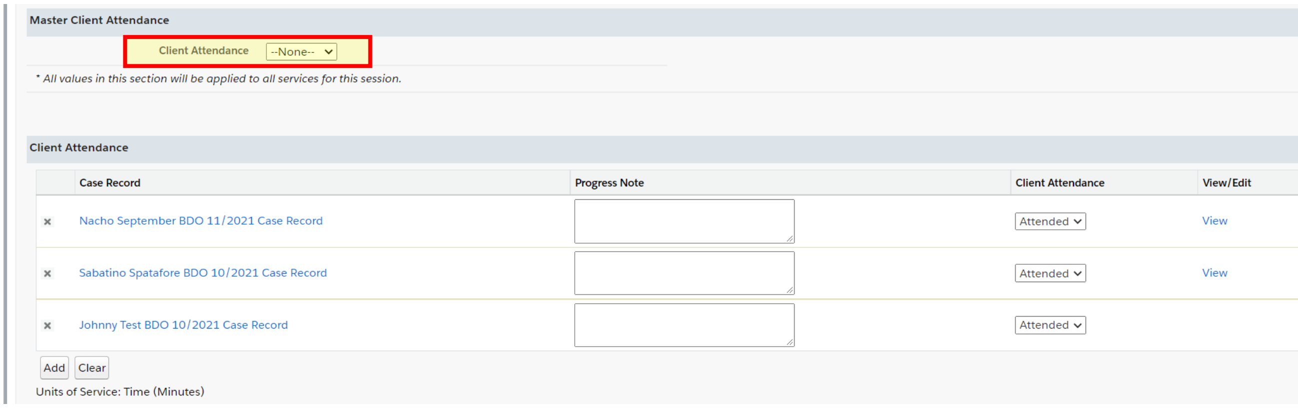
x. Click on the "Edit Session" button to take attendance. *Note: "edit session" is synonymous with "attendance tracking".*

xi. On the next screen you can update the session details; for example: Set status as "Record Attendance, Add the Duration (Minutes) of the training session, Type of Workshop is "Business Development", the topic/course of the training session, the language, the training method, etc.

Note: *Choose "Business Development" as the Type of Workshop/Class, as this will automatically provide you with Topic/Course options related to business development.*



xii. Select "Attended" as the "Client Attendance" since this will give all the clients enrolled in this workshop an "Attendance" value and you can update individually as needed.



xiii. Click on the "Save & Close" button.

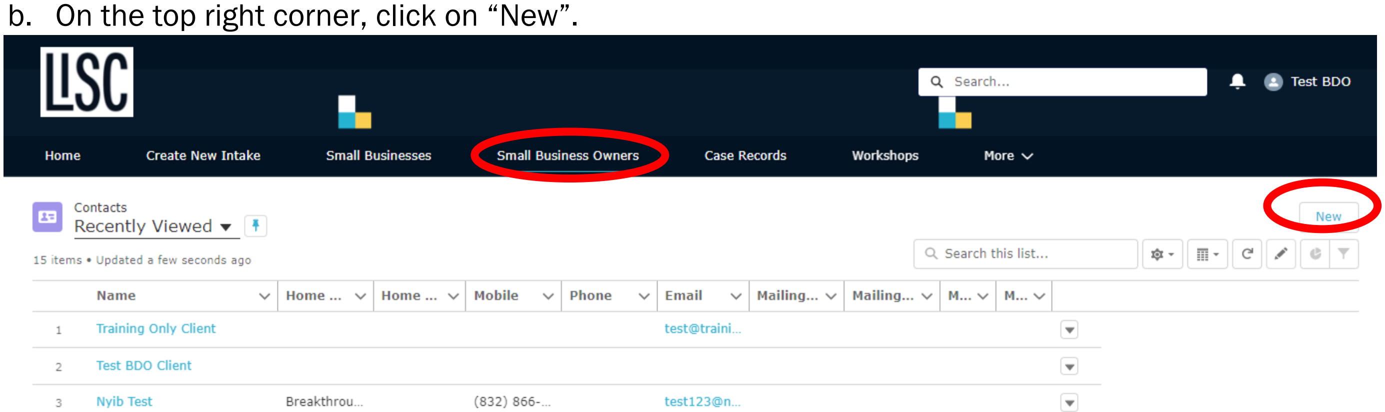
Tracking Training-Only Clients

Using the definitions above, identify Training-Only clients: a client that has attended a training and is not receiving counseling is considered as a Training-Only client. Below we will walk through on (1) how to create a contact record for the Training-Only Client and (2) how to add them to a workshop as a participant.

1. Adding Training-Only Client in Salesforce

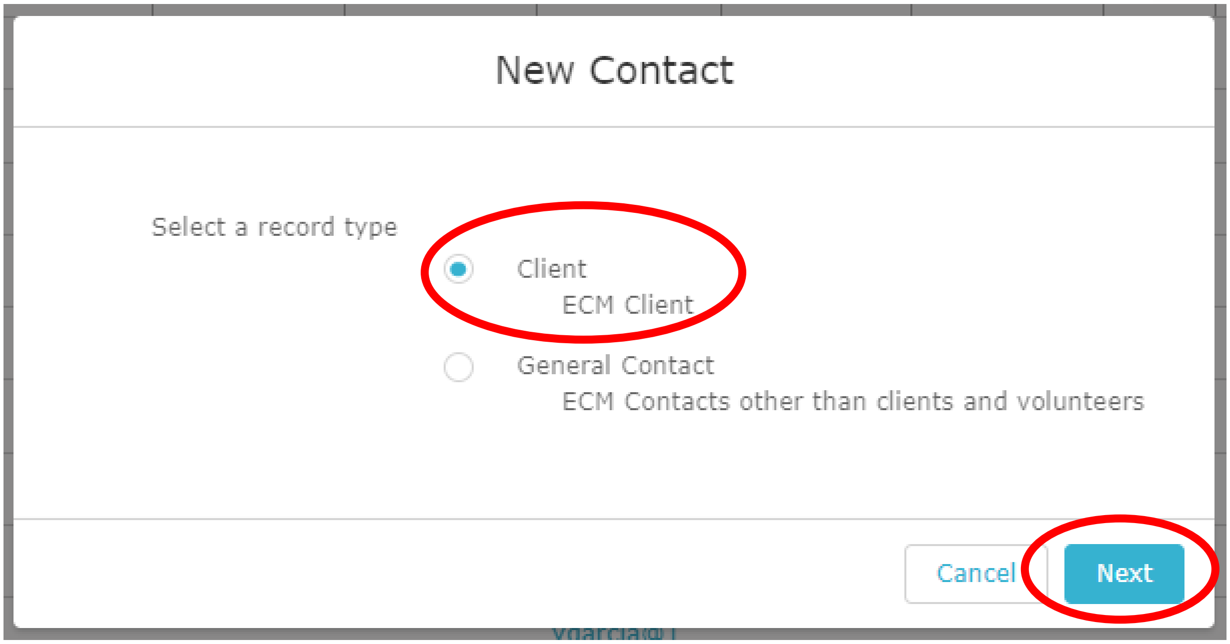
a. Once logged into Salesforce, instead of creating an intake, navigate to the "Small Business Owners" tab in the navigation bar.

b. On the top right corner, click on "New".

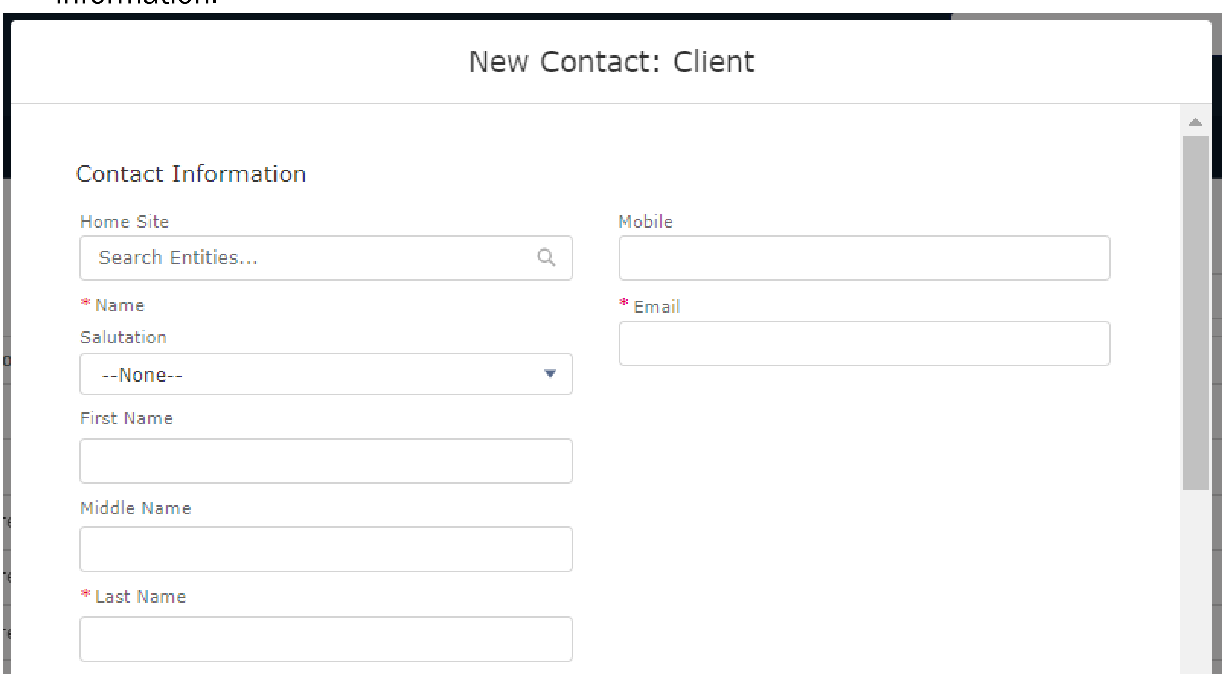


c. It will ask you to choose the New Client record type. **Always choose "Client".** Click "Next".

Note: *If you accidentally choose "General Contact", please notify your Salesforce admin to delete the contact record.*



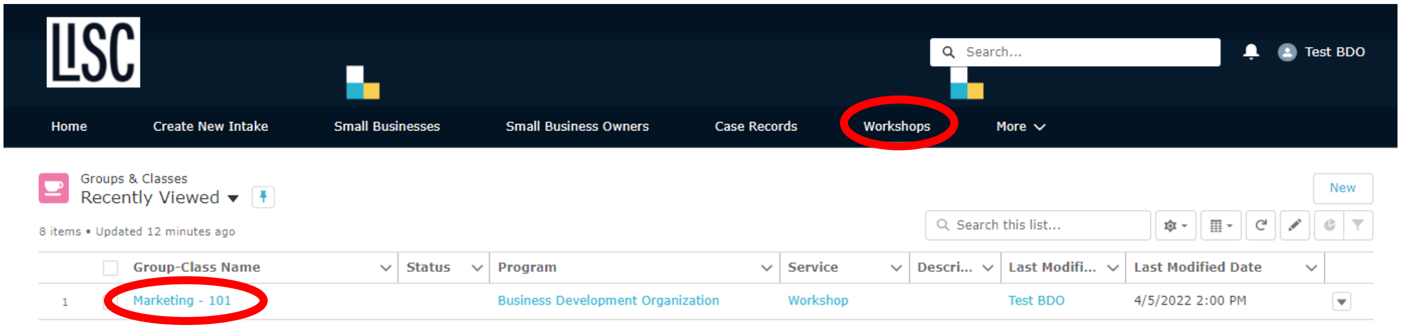
d. Fill in the Training-Only client's information. There are four required fields: **Home Site** (search for your organization's name), **First Name**, **Last Name**, and **Email**. Feel free to fill any other information.



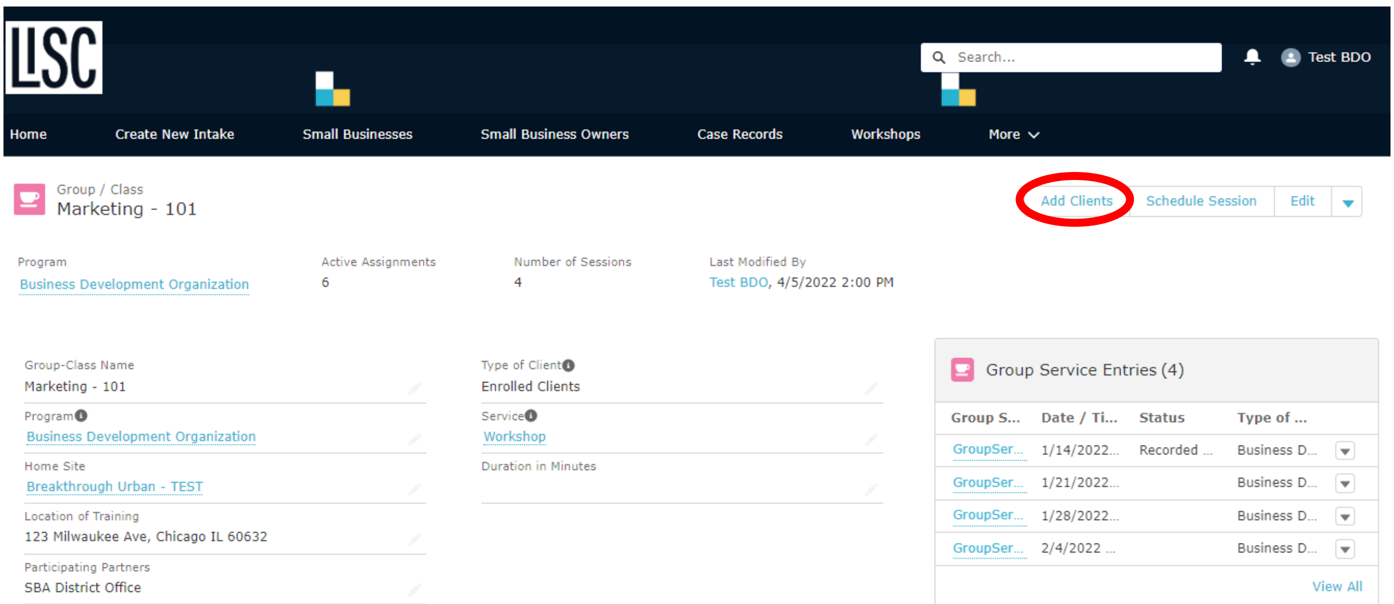
e. "Save & Close"
f. The client now has a contact record under "Small Business Owners".

2. Adding Training-Only Clients to workshops as a participant in Salesforce

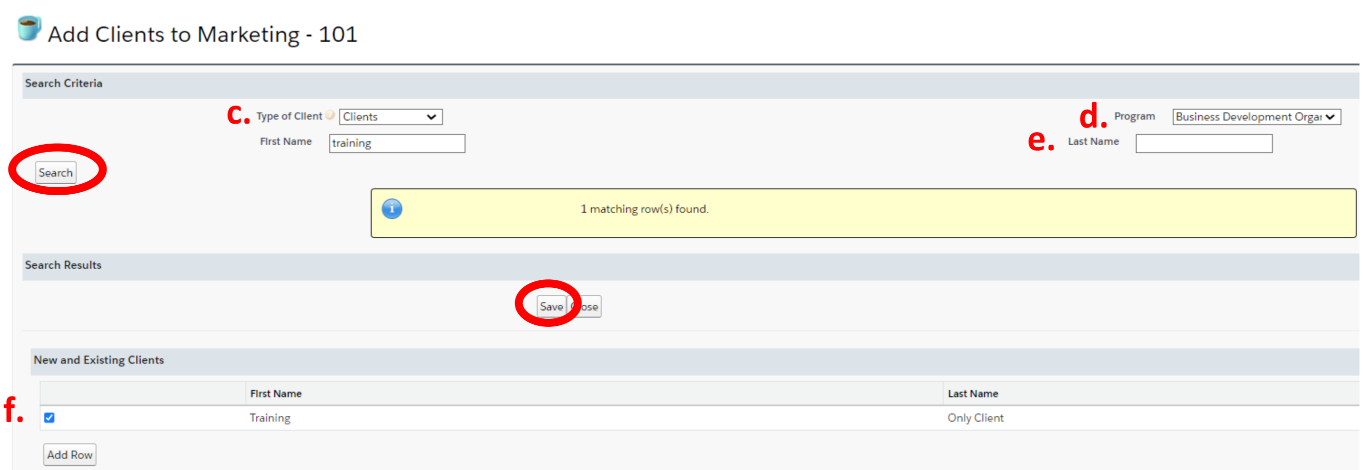
a. After creating your workshop, navigate to the "Workshops" tab and click on the "Group-Class Name" or create a new workshop by clicking on "New".



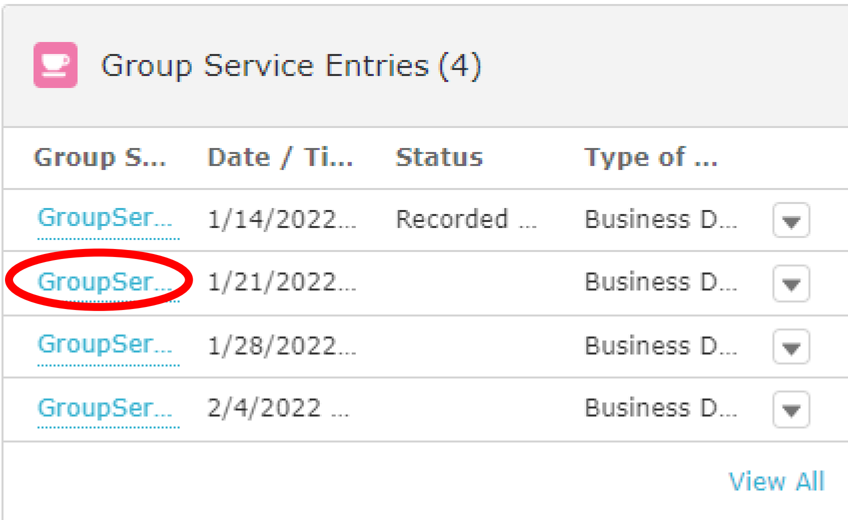
b. Once you click on the existing workshop or have finished creating the new workshop, click on "Add Clients" on the top right corner.



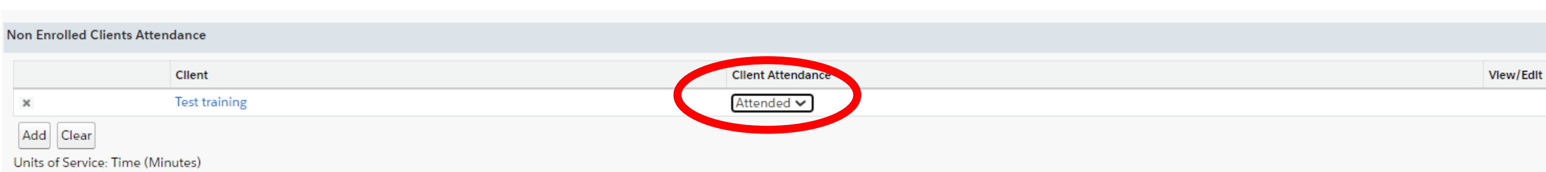
c. Choose "Clients" as the Type of Client.
d. Choose "Business Development Organization" as the Program.
e. Enter the client's first or last name and click on "Search".
f. Find the client below and click the check mark and "Save".



g. The Training-Only client will now show in the “Group Service Entries” listed on the right of the Workshop page.
    i. To record attendance for this client, click on one of these workshop sessions.



    ii. Click on “Edit Session”
    iii. Scroll to the bottom of the page and under “Non Enrolled Clients Attendance”, you will find your Training-Only clients. Change the “Client Attendance” to reflect if they attended the training or not.



    iv. If you do not see the Training-Only client, you can add them by clicking on “Add” and finding their contact record you created in step (1)