CRM Training Guide for Partners

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We here at Onward Israel are excited for another year of programming with our local partners! In preparation for our upcoming programs we have built a step-by-step guide for our Customer Relationship Management (CRM) system. I'm sure you are all aware of Salesforce and the basics, but this guide will take a deep dive into all this platform has to offer. There will be screen shots, as well as descriptions, so you can easily follow along. This guide will help you navigate the applicant page, update contact information, add notes, run detailed reports and so much more. As always, the Onward Israel staff are here to support you, so if you have any questions about this guide, the CRM in general, or your specific program, feel free to reach out to us!

Listed below are a few key aspects to remember when using the CRM:

- The CRM is very specific and will not work if there are any typos.
- Always remember to click "Save" after adding in any information in the CRM. If you do not hit save each time after adding information to an application, the information you updated will not save.
- If you click a back arrow after adding information, the information will also not save.

During the lifecycle of an applicant, you will be making edits and changes to three main pages in the CRM:

- The Contact page
- Application page
- Program Page

Each page is unique and contains different information pertaining to the applicant and your program. Below will list out how to navigate each of these three pages, the information stored on each page, how to edit the different sections, and how they relate to one another. You can access any one of these pages by looking up the program name and/or the applicant's name, phone number, or email in the search bar.

CONTACT PAGE (personal general information)

There are two different ways to access the Contact page:
1. Access through the Applicant Page
    a. If you are on the applicant page and want to view the contact information, click on the Applicant's full name at the top of the page

      b. This should take you directly to the applicant's contact page

2. Access through the search bar
      a. Search the applicant's name/email/phone number in the search bar of the main page
      b. The results should yield options under different sections, such as "Contacts" and "Onward Israel Applications"
      c. Click the applicant's full name under the "Contacts" section

The Contact page contains the following sections: contact details, contact information, citizenship, address information, academic information, emergency contact information, onward applications - the rest of the sections are not important for the work you will be doing (SEE BELOW for a screenshot of what the page will look like).
You will most likely not need to make edits to this page, but should instead use it as a reference for additional information about each of your applicants.

▼ Citizenship
Israeli Citizenship	Other Citizenship
	Other Country of Citizenship

▼ Academic Information
University	Tulane Univers. /	Year/ Projected Year of Graduation	2023
Major	Neuroscience and . 'usic Pe formance, minor in Public Health		

▼ Emergency Contact Information
Emergency Contact 1 Person Name		Emergency Contact 2 Person Name	
Mobile (Emergency C1)		Mobile (Emergency C2)	
Email (Emergency C1)		Email (Emergency C2)	
Relationship to Applicant (Emergency C1)	mother	Relationship to Applicant (Emergency C2)	father
Country (Emergency Contact 1)	United States o	Country (Emergency Contact 2)	United States of America
State/Province (Emergency Contact 1)		State/Province (Emergency Contact 2)	
Street (Emergency Contact 1)		Street (Emergency Contact 2)	, PI
City (Emergency Contact 1		City (Emergency Contact 2)	
Zip Code (Emergency Contact 1)		Zip Code (Emergency Contact 2)	

▼ Remote Latest Participation Indication (Visible only)
Did Not Successfully Complete Remote		Remote Participations	0
Did Not Complete Remote Reason			
Did Not Complete Remote Other Reason			
Credit Amount			
Credit utilized by Participant			

▼ Address Information
Primary Address Type	Current	Secondary Address Type	Permanent

APPLICATION PAGE

There are two different ways to access the Applicant page:
1. Access through the Contact Page
   a. If you are on the Contact page and want to view the applicants' application information, scroll down towards the bottom of the Contact page until you reach the "Onward Applications" section
   b. Click on the "Onward Israel General Application - Summer 2021" - when you wave your cursor over the text it should be underlined and become highlighted
   c. Once you click on it, you will be taken the Application page for said applicant
2. Access through the search bar
   a. Search the applicant's name/email/phone number in the search bar of the main page
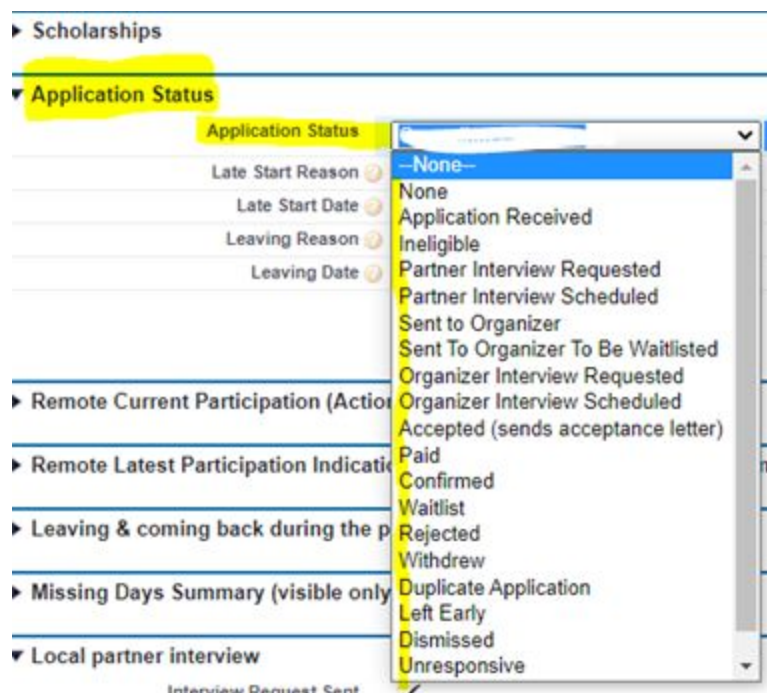   b. The results should yield options under different sections, such as "Contacts" and "Onward Applications"

c. Click the "Onward Israel General Application - Summer 2021" under the "Onward Applications" section

On each application page, you have several sections. Under Application Status section, double click next to the Application Status field, there will be a drop-down menu where you can change the status of that applicant.

Hover mouse over the "Onward Applications" tab on the left. You can click their general application for all application information. Scroll down to see all information including resume where you click to open.

On each application page, you have several sections. Under Application Status section, double click next to Application Status field, there will be a drop-down menu where you can change the status of that applicant.

- <u>None</u> - doesn't appear as an application in the numbers
- <u>Application Received</u> - default when someone applies
- <u>Ineligible</u>- mark when they are ineligible based on various reasons, geography or previous Israel experience, could be they are not eligible for Onward Israel in general. Make sure you reach out to the applicant to let them know and maybe direct them to a program they are eligible for
- <u>Partner Interview Requested</u> - once you have sent out an initial interview email you update this status
- <u>Partner Interview Scheduled</u> - once the participant has scheduled an interview you update this
- <u>Sent to Organizer</u> - when you have completed an interview, updated the local partner notes you update this status (on an Israel Experience program, this status "wakes" our sync. with them and send the application to the Israel Experience.
- <u>Sent to Organizer to be Waitlisted</u> – if an applicant is just okay and will probably end up on the waitlist or it is too late in the season and spots are full so send the organizer
- <u>Organizer Interview Requested</u> - when the organizer requests an interview; they will update
- <u>Organizer Interview Scheduled</u> - when interview is scheduled; they will update it

- <u>Accepted</u> - when you and the internship coordinator determine to accept a participant you update this status, it triggers the "acceptance letter" (which you have already drafted) to be emailed to the participant's primary email on their contact page. Note, there is a box called "Acceptance Letter Sent" under the Letters section of the applicant page that will need to be clicked on/checked off upon once you change their status to Accepted (**See Acceptance Section below** on how to add Acceptance Letter language to your program)
- <u>Paid</u> - when a participant pays the program fee, the organizer will update this
- <u>Confirmed</u> - when a participant has an internship secured, paid the fee, submitted documents (passport, rav kav, Terms Of Agreement, medical form) the organizer will update
- <u>Waitlist</u> - if a participant requests to be placed, if you think a participant isn't as strong, if a participant payment window expires, you place them on the waitlist. Send an email letting them know they are on the waitlist
- <u>Rejected</u> - if a participant is not a good fit for the program. Send an email to the applicant that they are rejected
- <u>Withdrew</u> - if a participant emails you or the internship coordinator withdrawing from the program. Participants who have paid and withdrew can only receive 50% of their program fee refunded up to the specified date. Could be marked as withdrew early in the process as well if you are informed
- <u>Duplicate Application</u> - system glitch, mark as duplicate, so that the application numbers aren't affected
- <u>Left Early</u> - a participant leaves the program early voluntarily, organizer updates
- <u>Dismissed</u> - a participant leaves the program early involuntarily, organizer updates
- <u>Unresponsive</u> - a participant has stopped responding after numerous emails/phone calls. Make sure you email them notifying them that because they are unresponsive you are removing their application from consideration
- <u>Cancelled Program is a new application status (visible when you scroll down the list) and used by OI only</u>. It was created following the Coronavirus epidemic, to mark every applicant that already "paid" or "confirmed" on a program that needed to be cancelled. It will use us again in the future if the program is cancelled and the applicant already paid.

ACCEPTANCE LETTERS/ACCEPTING AN APPLICANT

1. Partners should work with their Onward Israel account manager and organizer to finalize language for their acceptance letters. Language should include: Program Fee Amount, Deadline to pay fee, the registration page link (supplied by the Organizer), refund amount/withdrew language, internship placement process language if fee is paid, Document submission deadlines and list of documents needed by which deadline, information about pre-program orientation (see image below of an example of "Acceptance Letter Language"
2. Once you have this information you will need to enter it in the CRM
    a. First go to your main program page - it should say your specific city/campus followed by Summer 2021
    b. Navigate to the "Acceptance Letter Setup" section
    c. Add Program Name next to the "Program Name for Acceptance Letter" Section
    d. Add the local partner organization (ex.Jewish Federation of _____) next to the "Partner Official Name" section
    e. Add the organizer name (ex. Israel Experience LTD, Destination Israel, Sachlav, etc) next to the "Organizer official name" section
    f. Add the Program Partner Contact information (ex. Rivki Ebner, Cleveland Onward Coordinator, The Jewish Federation of Cleveland) in that section
    g. Add the partner email in the "Program Partner Contact Person Email" section
    h. Add the organizer's contact information (ex. Rachelle Paneth, Director of Recruitment and Registration, Israel Experience) in the "Program Organizer Contact Person" section
    i. Add the Organizer's email in the "Program Organizer Contact Person" section
    j. Navigate your way down the page to the "Registration Checklist" section
    k. Double click on this section to add your Acceptance Letter Text (See screenshot below)
    i. Acceptance Letter text should include the aforementioned information: program fee, how to pay the program fee, payment portal link, documents needed, deadlines for documents and payment, security deposit information, withdrew information, pre-program orientation information, etc
    l. You must click "acceptance letter complete" checkbox

      m. Once you have entered in all the information above, and checked the "acceptance letter complete box", hit the SAVE button at the top of the page

      n. IF YOU DO NOT HIT THE SAVE BUTTON, YOUR CHANGES WILL NOT BE UPDATED, so make sure to ALWAYS SAVE

3. Once the application letter section is finalized, partners should contact their specific Onward Israel Staff member to run a "test application" to make sure the application process and Acceptance Letter are both functioning properly and look the way they should

4. If an applicant was approved to move forward in both a first round interview with the partner and a second round interview with Internship Coordinator, the partner will decide if they want to accept the applicant, and if so, they will change the applicants status to 'Accepted' on the Applicant page

5. This will prompt the CRM to send out an **automatic** acceptance letter, which contains the language you already drafted, as well as the link to the registration page for their program. *Status should not be changed to 'Accepted' before your acceptance letter language is finalized and input on the main program page*

6. If the applicant pays the program fee by their assigned deadline, the Organizer changes status to 'Paid'

7. Organizer changes status to 'Confirmed' once an applicant has submitted all of their required documentation and the organizer approves all of the documents

▼ Acceptance Letter Setup			
Partner Official Name	University of Michigan Hillel	Program Partner Contact Person	
Organizer Official Name	E...	Program Partner Contact Person Email	..."@umich.edu
		Program Organizer Contact Person	Raina Faro
		Program Organizer Contact Person Email	p..."@bina.org.il
Partner/Organizer Bullet Points		Additional Program Contact Person	F...
Partner Additional Text		Additional Program Contact Person Email	r...n@hillel.org
Registration Checklist	E X A M P L E		
Registration checklist (BICEP)			
Acceptance letter set up ready	✓		

WAITLISTING/REJECTING AN APPLICANT

1. If the partner is unsure whether to accept someone after their first round interview, either because they aren't sure they can be placed/are a good fit/other reasons, you will change the status to "Sent to Organizer – to be waitlisted." This will indicate to the Organizer/Internship Coordinator that they can reach out to the applicant to schedule their second round interview

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and make them aware that you are unsure of the applicant and why. This will prompt the Organizer to read over your notes and be aware of your concerns during their interview.

2. Internship Coordinator reaches out to schedule an interview and change status to "Organizer Interview Requested". Once scheduled, they will change status of applicant to "Organizer Interview Scheduled"

3. After the second round interview, the Internship Coordinator and partner will discuss the applicant and make a final decision to either accept, waitlist or reject. Partner will need to update the Status section to reflect the decision made. If you decide to waitlist or reject, **Unlike the Accepted status, this will NOT send an automatic email in the CRM**. The partner will need to send out a rejection or waitlist email manually.

   a. Under Local Partner Interview section, you can double click to add in notes for various areas.

**Always hit save anytime you make changes to an applicant's application before you leave that page. If you do not hit save after you have made a change, that change will not be saved.

Additional Information from Application Form is the section that contains program specific questions from the application form.

GENERAL MASA ELIGIBILITY

MASA Eligibility section contains all the answers to the Masa questionnaire that were filled in by the applicant on the application form. It also shows the result, Masa eligible (checkbox checked yes or no).
When Onward Israel has the Sync. with Masa in the CRM, we will also have a new field called: Masa Internal Eligibility Check, that will indicate the Masa additional check to make sure an applicant is Eligible for the Masa grant.

REMOTE INFORMATION

Remote Latest Participation Indication based on info in Contact (Visible only) this section is new and was added following the coronavirus pandemic. Onward Israel established new Remote programs and a need came up to mark participants in Remote, who were promised to get a $100 credit for the next program participation (eventually, applicants who signed up and paid for our July Fellowship program in summer 2020 were also offered this, even though that program was also

cancelled).This section also marks people who did not finish the program successfully and the reason why.

This section will be full (and locked for you), in case Onward Israel added data for this past applicant, in order to enable partners and organizers to see this information, because it will affect the following application process of this applicant.

Remote Current Participation (Action Section) this section (again, this is mainly for partners to view the information) is the one that enables us to enter data regarding current "remote" participation of a participant. This data also reflects on a participant's Contact page, and from there reflects on every new program application page of this applicant (so for example, if an applicant did a remote program and did not finish successfully, we will mark it here on their remote application form, but later on it will be automatically presented in every new application page, so we can see and take this in mind in the screening process.

REPORTS IN THE CRM

In the Onward Israel portal, the partner's use of reports are limited only to reports already created by Onward Israel staff. This means that you can access our past reports to view, but you are unable to change or modify them.

If you need a specific report adjusted to your needs, or a new report created altogether, you will need to reach out to your specific Onward Israel staff contact person. When asking for a report please be as specific as possible with the details you want included (i.e. what is the target of this report, what information about the applicant do you want included, what years do you want to view, etc), and the specific fields you would like to see (i.e. applicant's email, phone number, university, hometown, graduation year, application status, emergency contact info, etc).

The reports tab includes various folders which you can access at the left navigation bar:

Reports & Dashboards

The main reports that partners often use are:

- Full applicant's report: this has all the fields from the application form
- Participation report: organizers use this to track payments most of the time

Specific reports that you request, will usually be saved on the folder" Onward Staff - for portal users.

**POTENTIAL PROBLEM WITH VIEWING THE HOUSING SECTION WHILE USING CHROME:

If you come into a case where you can't view the "Housing section" on a program page, you should make an adjustment on your Chrome browser as follows:

- Type: chrome://flags/ on the search window
- Find on the long list; SameSite by default cookies
- Change from default to DISABLED
- CLOSE Chrome and reopen it

- Go back to Onward Israel CRM to check that the Housing section on the program page can be viewed.
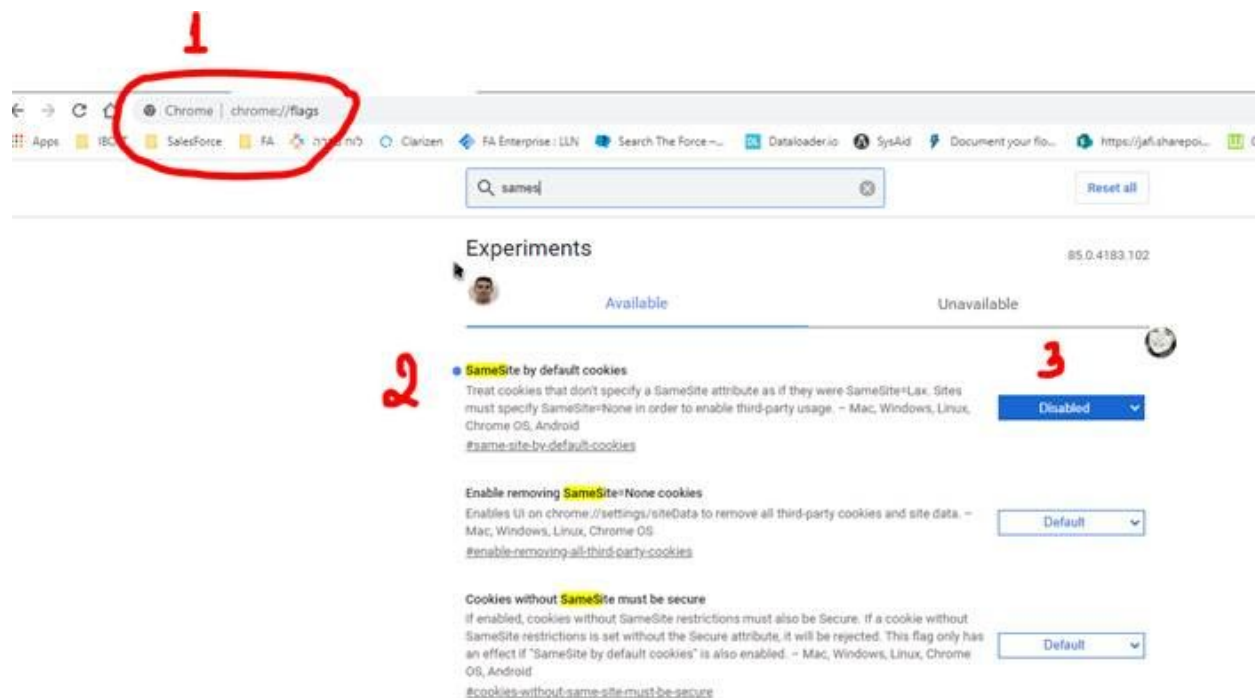
MASA PROGRAMS TRAINING

There are a few important issues to consider while working on Onward Israel - Masa programs:

1. **No program switches are allowed.**
   This is relevant mainly for partners that have more than one program/track. From now on, one application needs to be attached to one program and if an applicant would like to switch programs (or tracks), the initial application should be marked as "withdrew" and a new application should be established in the "new" program.
   (This is important since we have a sync with Masa and there is a payment process for the applicants on the Masa CRM, so someone can't just be switched into a new program with the same application).

We will have 2 ways to let this person switch into a new program:
1) Send them to a new Onward Israel program webpage to apply to the new program they would like to switch to.
2) Ask the Onward Israel team to "designate" them with the new program and create a personal "pre-fill" URL for this cause.

We prefer option 1 in order to make the process work quickly without the need to wait on Onward Israel team assistance but we are available to assist in case you think this applicant should get a pre-fill link that can shorten the process.

2. **A new step on the screening process on Onward - Masa programs: Masa Internal Eligibility Check.**
As we start working with the Masa sync., we created an additional step that will send all applicants that turned out to be "Masa Eligible" (after filling out the Masa questionnaire on application form), to an additional check on the Masa CRM.
The additional check on Masa, can have an answer YES = Masa Eligible or NO = Masa ineligible.
ONLY when you see a YES answer on this new field on the application page: <u>Masa Internal Eligibility Check = Yes</u>, you can continue with the screening process and setting up the interview.
This field will appear next to our current field that you already familiar with: MASA Eligible
We don't have it yet on the page because it is all still being tested out with IT but as soon as we have this ready, we will send out a specific description and will add this field to our new applications "list view" called: Summer 2021 Applications, so that you can follow up easily.

3. **MASA Ineligible Paid by Partner new field on Partner's section on application page:**
In case that you have an applicant that is not Masa Eligible but you decide to cover the costs, you must mark this new field on the application page, as 'Yes'.