GDB Puppy Raising Community Handbook: for Leaders, Raisers, Sitters and Volunteers

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Overview
This handbook is a guide for Puppy Raisers, Puppy Sitters, Puppy Club Volunteers and Puppy Club Leaders to use when accessing and navigating Guide Dogs for the Blind’s (GDB) new online Puppy Raising Community.

Log In
- Initially you will receive a welcome email that contains the community URL and your username. Please set up your password by clicking on the link in the email.

Hi Danielle,

Welcome to the GDB Puppy Raising Community! To get started, go to https://gdb.force.com/puppyraising to set up a password and get logged in!

Username: dvelken@guidedogs.com

Thank you,
Guide Dogs for the Blind

- You will also want to make note of your username, you will need it each time you login to the Community.
- To reach the login page in the future, go to: https://gdb.force.com/puppyraising
  - Enter your username and password and select Log in
  - You can also select ‘Forgot Password’ if you need to reset your password
TIP: You can either bookmark this URL on your web browser OR you can access it anytime from the Puppy Raising page of the GDB website (after launch).

View & Update Your Profile
Use the following steps to view and/or update your own contact information in the Puppy Raising Community.

- Click your name at the top right of the page (1)
- Select ‘My Profile’ from the dropdown menu (2)
- Select Edit and you will have the ability to add a photo, update your Name, Email and Mobile and save once complete.

TIP: if you want to update any further information, you will need to contact GDB at ipuppy@guidedogs.com.
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Homepage Navigation
Once logged in, you will be in the Puppy Raising Community and land on a homepage with a navigation bar at the top. Below outlines what Puppy Raisers, Puppy Club Leaders, Puppy Club Sitters and Volunteers will be able to access from the navigation bar.

- **Navigation for Puppy Raisers**
  - **Home**: this tab will always take you back to the homepage
  - **Dogs I’m Raising**: this tab will show you a list of Dogs that you are actively raising
  - **Contacts Directory**: this tab will show a list of contacts including any Leaders of your puppy clubs, your co-raisers and members of your household
  - **Puppy Clubs**: this tab will show you a list of puppy clubs that you are an active member of (have raised a puppy in the last 6 months)
  - **Raiser Puppy Reports**: this tab will show you all the Puppy Reports that you have started and/or submitted to GDB through the community. **Historic puppy reports from the old system will not be available in the community.**
  - **Forms & Resources**: this tab will give you access to Puppy Raising documents and forms, as well as the training videos and guides for navigating the Community

  **TIP:** when viewing Puppy Club details from a mobile device or tablet you may need to click on the ‘Rels’ list to expand it.

- **Navigation for Puppy Club Leaders** (leader only, not raising a dog)
  - **Home**: this tab will always take you back to the homepage
  - **Club Dogs**: this tab will show you a list of any active Dogs that are a part of the Puppy Clubs that you lead
  - **Contacts Directory**: this tab will show a list of contacts including Leaders and Members of your Puppy Clubs and any co-raisers and members of your household
  - **Puppy Clubs**: this tab will show you a list of puppy clubs that you are a Leader or member of
  - **Leader Puppy Reports**: this tab will show you all Puppy Reports that have been submitted by your club members and are ready
for leader comments. This tab will also show you the Puppy Reports that have been submitted to your CFR.

- **Forms & Resources:** this tab will give you access to Puppy Raising documents and forms as well as Leader specific documents and forms. You can also find the training videos and guides for navigating the Community here.

- **Navigation for Puppy Club Sitters and Volunteers**
  
  - **Home:** this tab will always take you back to the homepage
  - **Contacts Directory:** this tab will show a list of contacts including any Leaders of your Puppy Club and members of your household.
  - **Puppy Clubs:** this tab will show you a list of puppy clubs in which you are an active member
  - **Forms & Resources:** this tab will give you access to the Puppy Raising documents and forms, as well as the training videos and guides for navigating the Community

- **Puppy Club Leaders who are actively raising a puppy will have the appropriate Raiser menu items in addition to the Leader menu items, example image below**

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**Homepage Sections**

The Homepage will have different sections based on if you are a Puppy Club Leader, Raiser, Sitter or Volunteer.

- **Puppy Raiser Homepage**
  
  - **GDB Announcements:** this list shows any active general announcements from GDB Puppy Raising staff
  - **Your Club Announcements:** this list shows any active announcements specific to your puppy club from your puppy club leader(s)
  - **Current Co-Raisers:** this list shows anyone in your household that you are currently co-raising a puppy with (if any)
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- Club Leaders: this list shows you all the leaders of your puppy club

- Puppy Club Leader Homepage
  - GDB Announcements: this list shows any active general announcements from GDB Puppy Raising staff
  - GDB Leader Only Announcements: this list shows any active general announcements from GDB Puppy Raising staff that are specific to leaders only
  - Your Club Announcements: this list shows any active announcements specific to Puppy Clubs that you are a leader or member of. These announcements are from the puppy club leader(s)

- Puppy Sitter/ Club Volunteer Homepage
  - GDB Announcements: this list shows any active general announcements from GDB Puppy Raising staff
  - Your Club Announcements: this list shows any active announcements specific to your puppy club from your puppy club leader(s)
  - Club Leaders: this list shows you all the leaders in your puppy club

Monthly Puppy Reports (Primary Puppy Raisers)
Monthly Puppy Reports will be created automatically each month for any active primary Puppy Raisers. Only the primary raiser for EACH household can complete puppy reports.

The reports will be created at the beginning of every month and an auto-generated email will go out indicating that the report has been created and you can begin to fill it out.

You will also receive an auto-generated email reminder if your report has not been submitted to the Club Leader by the 7th of the following month.

Use the Steps below to complete and submit the report to your Club Leader

- Update a Monthly Report
  - Option 1: Select the ‘Dogs I’m Raising’ tab and click on the name of the dog you would like to complete the report for
- On the Dog’s detail page, the list of reports will be at the top of the page. You may have to ‘View All’ to see most recent report.
- Select the down arrow and hit ‘Edit’ next to the report you wish to complete or Click on the name of the report and click ‘Edit’ from there.

  - Option 2: Select the ‘Raiser Puppy Reports’ tab and locate the report you wish to complete from the “My In Progress Reports” section.
    - Click on the name of the report you wish to complete
    - Click ‘Edit’ button
  - **DO NOT** attempt to change the name of a report. You will receive an error upon saving if you do so. The only way to get around the error is to hit the ‘Cancel’ button or rename the report exactly how it was initially. If you can’t recall the initial name of the report you will have to hit ‘Cancel’ and lose any work you made.

**TIP:** You can edit a report all month long before submitting and there are no time limits. Just be sure to hit ‘Save’ at the bottom of the report to save your progress!

- Submit a Monthly Report to Club Leader
Select the ‘Raiser Puppy Reports’ tab and locate the report you wish to complete from the “My In Progress Reports” section. Once you have completed the Monthly Puppy report, update the ‘Report Status’ field to “Ready for Club Leader” and select ‘Save’.

Once you do, the report will lock and no further edits can be made. The primary leader of your puppy club will get an auto-generated email letting them know that your report has been submitted and is ready for their review.

**Monthly Puppy Reports (Club Leaders)**

Once a Puppy Raiser submits a Monthly Report, the primary club leader will receive an auto generated email alerting them that the report is ready for their review. All leaders are able to view and add comments to reports, but only the primary leader will receive email notifications.

The primary leader will also receive an auto-generated email reminder that leader comments are due, if the report has not been submitted to CFR with leader comments, 10 days after the raiser submitted the report.

Club Leaders will be able to view the report, add leader comments and submit the report to the CFR using the steps below:

- Complete leader comments and submit to CFR
  - Select the ‘Leader Puppy Reports’ tab and find the “Ready for Leader Comments” section
  - Click on the name of the report you would like to review/update and select ‘Edit’ button
  - Add leader comments and update ‘Report Status’ to “Ready for CFR” and select ‘Save’
Once you do, the report will lock and no further edits can be made. The CFR will get an auto-generated email letting them know that a report has been submitted and is ready for their review.

Creating & Submitting Final Report (Primary Puppy Raisers)

- Creating the Final Report
  - Select the ‘Dogs I’m Raising’ tab and click on the dog you wish to start the report for
  - From the Dog detail page, select the ‘New Final Report’ button just under the Puppy Reports section
  - You will be redirected to a page with the newly created report. You must select the ‘Edit’ button to begin filling out the report.
  - Select ‘Save’ button to save your progress if you want to return to complete the report later
  - **DO NOT** attempt to change the name of a report. You will receive an error upon saving if you do so. The only way to get around the error is to hit the ‘Cancel’ button or rename the report exactly how it was initially. If you can’t recall the initial name of the report you will have to hit ‘Cancel’ and lose any work you made.
Submitting the Final Report

- Select the ‘Raiser Puppy Reports’ tab and click on the name of the report you wish to submit from the “My In Progress Reports” section.
- After report opens, click ‘Edit’ to add any updates.
- When complete, change ‘Report Status’ field to “Ready for CFR”
  - Once you do, this will lock the report from further edits and will send an auto-generated email to the CFR letting them know the report has been submitted.

Creating & Submitting Fun Things (Primary Puppy Raisers)

- Creating Fun Things
  - Select the ‘Dogs I’m Raising’ tab and click on the dog you wish to start the report for
From the Dog detail page, select the ‘New Fun Things’ button just under the Puppy Reports section.

You will be redirected to a page with the newly created report. You must select the ‘Edit’ button to begin filling out the report.

Select ‘Save’ button to save your progress if you want to return to complete the report later.

**DO NOT** attempt to change the name of a report. You will receive an error upon saving if you do so. The only way to get around the error is to hit the ‘Cancel’ button or rename the report exactly how it was initially. If you can’t recall the initial name of the report you will have to hit ‘Cancel’ and lose any work you made.

**Submitting Fun Things**

- Select the ‘Raiser Puppy Reports’ tab and click on the name of the report you wish to submit from the “My In Progress Reports” section.

- After report opens, click ‘Edit’ to add any updates.

- When complete, change ‘Report Status’ field to “Complete” and click the “Save” button.
Once you do, this will lock the report from further edits

Club Announcements (Leaders)

Puppy Club Leaders are able to create Announcements specific to the Clubs that they lead. Use the steps below to create Club Announcements as a Club Leader.

- Creating an announcement
  - Select the ‘Puppy Club’ tab and click on the name of the Puppy Club you would like to make an announcement for.
  - Select the ‘Manage Announcements’ tab from the Announcements section of the page (1)
  - Click the ‘+New’ button (2)

  - Fill in the appropriate fields and select the ‘Save’ button
    - You must check the ‘Active’ box if you want the announcement to be posted.
    - DO NOT remove the pre-populated Puppy Club name. If you are a leader of multiple clubs, you MUST go to that clubs page to make an announcement.
TIP: If you choose to enter an end date, the ‘Active’ box will automatically deselect on that date and will remove the announcement from view for club members

- Managing announcements
  - If you need to De-activate any club announcements, make edits or view past Inactive announcements go to the ‘Manage Announcements’ tab of the page.
  - Select the announcement you wish to manage to open
  - Select ‘Edit’ to make changes and then ‘Save’
  - You may have to hit ‘refresh’ button to see changes right away

Access to the Community

Active members of a puppy club will have access to the online Puppy Raising Community. The content a member sees in the community is based on what type of puppy raising volunteer they are and what records they have permission to view.

- What does active mean?
  - Active means GDB’s records show you are either:
    - currently raising a puppy
    - a current puppy club leader
    - a current puppy sitter
    - a current puppy club volunteer
  - If you are not currently raising a puppy you will be active in the community for 6 months after your last puppy’s status changes to Release, Breeder or Client. After those 6 months, you will no longer be able to log into the community unless you continue to volunteer in a puppy club role shown above, or when you become an active volunteer again.
Announcements:

<table>
<thead>
<tr>
<th>Role</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Puppy Club Leader</td>
<td>• View all GDB announcements, GDB Leader Only Announcements</td>
</tr>
<tr>
<td></td>
<td>• Create and manage Club Announcements for their club only.</td>
</tr>
<tr>
<td>Puppy Raiser</td>
<td>• View all GDB Announcements</td>
</tr>
<tr>
<td></td>
<td>• View all club Announcements for their club</td>
</tr>
<tr>
<td>Puppy Sitter/ Club Volunteer</td>
<td>• View all GDB Announcements</td>
</tr>
<tr>
<td></td>
<td>• View all club Announcements for their club</td>
</tr>
</tbody>
</table>

Dogs:

<table>
<thead>
<tr>
<th>Role</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Puppy Club Leader</td>
<td>• View dog details for all active dogs in their puppy club for the same period of time the raiser can view those details (see below)</td>
</tr>
<tr>
<td>Puppy Raiser</td>
<td>• View dog details 7 days* after the puppy is assigned to them and for 45 days** after the puppy is no longer assigned to them (i.e. recall, transfer, breeding, etc)</td>
</tr>
<tr>
<td>Puppy Sitter/ Club Volunteer</td>
<td>• No access to view dog details</td>
</tr>
</tbody>
</table>

* This delay is for GDB administrative purposes
** This time is intended for the raiser to finalize reports

Contacts:

<table>
<thead>
<tr>
<th>Role</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Puppy Club Leader</td>
<td>• View all active members of the puppy club in which they lead</td>
</tr>
<tr>
<td></td>
<td>• View all leaders of the club in which they lead</td>
</tr>
<tr>
<td></td>
<td>• View all members of their own household</td>
</tr>
<tr>
<td>Puppy Raiser</td>
<td>• View all leaders of their puppy club</td>
</tr>
<tr>
<td></td>
<td>• View all co-raisers &amp; members of their own household</td>
</tr>
</tbody>
</table>
### Puppy Sitter/Club Volunteer
- View all leaders of their puppy club
- View all members of their own household

### Puppy Club:

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Puppy Club Leader</td>
<td>Have access to club details as long as they are an active leader</td>
</tr>
<tr>
<td>Puppy Raiser</td>
<td>Have access to club details as long as they are actively raising a puppy*</td>
</tr>
<tr>
<td>Puppy Sitter/Club Volunteer</td>
<td>Have access to club details as long as they are an active sitter and/or volunteer</td>
</tr>
</tbody>
</table>

*If a puppy that you have raised becomes a breeder, client dog or gets released you only have 6 more months of club access in the community unless you begin raising another puppy or become a leader sitter or club volunteer in that time.*

### Puppy Reports:

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Puppy Club Leader</td>
<td>View and add comments to monthly puppy reports that have been submitted to them through the puppy club they lead</td>
</tr>
<tr>
<td>Puppy Raiser</td>
<td>Primary* raisers can create, edit and submit puppy reports</td>
</tr>
<tr>
<td>Puppy Sitter/Club Volunteer</td>
<td>No access to puppy reports</td>
</tr>
</tbody>
</table>

*Only 1 primary puppy raiser allowed for EACH household*

### Forms & Resources:

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Puppy Club Leader</td>
<td>View all leader and raiser specific forms &amp; resources.</td>
</tr>
<tr>
<td>Puppy Raiser</td>
<td>View all raiser specific forms &amp; resources</td>
</tr>
<tr>
<td>Puppy Sitter/Club Volunteer</td>
<td>View all raiser specific forms &amp; resources</td>
</tr>
</tbody>
</table>
Automated Emails from the Community
All Salesforce automated email messages will come from the two specific email addresses I will detail below. If you are not receiving these messages please check your spam folder.

All Puppy Raising Community Emails will include the GDB logo on a green banner at the top of the email.

- These automated emails will have the sender name of “GDB Salesforce System” with the email address gdbsalesforce@guidedogs.com

<table>
<thead>
<tr>
<th>Automated Email</th>
<th>Recipient</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly report created</td>
<td>Primary Puppy Raiser</td>
<td>1&lt;sup&gt;st&lt;/sup&gt; of each month</td>
</tr>
<tr>
<td>Reminder: Monthly report due</td>
<td>Primary Puppy Raiser</td>
<td>7&lt;sup&gt;th&lt;/sup&gt; of the following month, only if not already submitted</td>
</tr>
<tr>
<td>Notify Leader: Monthly report submitted</td>
<td>Primary Club Leader</td>
<td>When a raiser in their club submits a monthly report</td>
</tr>
<tr>
<td>Reminder: Add leader comments and submit to CFR</td>
<td>Primary Club Leader</td>
<td>10 days after Raiser submitted a monthly report, only if not already submitted</td>
</tr>
<tr>
<td>Notify CFR: Monthly report submitted</td>
<td>CFR</td>
<td>When a leader in one of their clubs submits a monthly report</td>
</tr>
<tr>
<td>Notify CFR: Final report submitted</td>
<td>CFR</td>
<td>When a raiser in their club submits a Final report</td>
</tr>
</tbody>
</table>

- These automated emails will have the sender name “Guide Dogs for the Blind Puppy Raising Community” with the email address community@guidedogs.com
<table>
<thead>
<tr>
<th>Automated Email</th>
<th>Recipient</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Member Welcome Email</td>
<td>All new members of the community</td>
<td>When your user account is initially activated. You will only receive this email once as long as you are an active volunteer</td>
</tr>
<tr>
<td>Changed password email</td>
<td>Any user who gets a password reset</td>
<td>If your password is reset by GDB</td>
</tr>
<tr>
<td>Forgot password email</td>
<td>Any user who requests to change their password</td>
<td>After you click “Forgot password” on the login screen</td>
</tr>
<tr>
<td>User Lockout Email</td>
<td>Any user who attempts to log in too many times with an incorrect password</td>
<td>If you enter your password incorrectly too many times in a row your account will be locked for 15 minutes.</td>
</tr>
</tbody>
</table>