

## Legacy Log-In to My Account

Name	Number	Last Updated
Legacy Log-in	002	11/20/2020

### Process Overview

Migration to VS 2.0 will also enhance the customer portal experience. VS 1.0 portal was called MyGS Community. VS 2.0 portal is called MyAccount. This QRG will describe the scenarios that pre-existing MyGS Community users will encounter as they are invited to create their password and log into their new MyAccount in VS 2.0 after migration and how customer care can assist.

Contacts in VS 1.0 will come over into VS 2.0 if they meet the migratable criteria—contact has a membership in MY20 and/or MY21, LTM, YALTM, and adults with restrictions. If primary 2 adults do not have an email address that is unique from the primary 1 of the household, they will come over as blank. The primary 1 will retain the previously shared email.

If that previously shared email is a default email then the primary will retain the old default of [GlobalID@noemail.gs](mailto:GlobalID@noemail.gs) and the Primary 2 will be blank.

**User Story:** Customer wants to purchase an event for their girl. Customer searches the catalog, adds the event to the cart and when attempting to complete registration, they are prompted to log into their account. Customer may try to use the “Don’t have an account? Sign up now” link. If the customer tries to create a new account, the system identifies a duplicate and prompts them back to log in or to contact their council for assistance.

## Previous vs. Current State

Every adult customer in Salesforce needs to have a unique email address. Prior to migration, your council used reports to identify and follow up with adults in VS 1.0 who did not have an email address that was unique from the household's primary 1 email and to identify and update adults assigned the "default" (GlobalID@Noemail.gs) email when one was not provided. Your council's team attempted to resolve as many of these missing emails prior to migration as possible.

### Previous State - VS 1.0

- Contacts were grouped into households and only one primary user had log in access to MyGS Community
- The system was based on a 2 parent/caregiver model that assumed both caregivers lived in the primary household. This structure excluded caregiver access to their girl's account if they did not live the primary household. And did not easily allow for entry of modern family structures.
- Caregivers often shared credentials or Primary 2 just let Primary 1 do all the household management.
- If Primary 1 and Primary 2 were not in the same family household Primary 2 would be in their own VS 1.0 household with a unique email address or a default email address but would still not have direct access to their girl in Primary 1's household.
- When there was no email available the default email was not always reporting friendly.

### Current State - VS 2.0

- All adult person accounts have an individual email, log in and password to their household MyAccount.
- The system is centered on a girl's person account and can have many affiliations allowing for many types of family structures to be accommodated.
- The primary caregiver can designate other caregivers/adults in the household access to the My Account. With their own emails and passwords.
- Affiliations and participations determine what can be seen but the account holder.
- New default email recommendation for better reporting.

## GSUSA Guidance

Secondary caregivers may be accustomed to sharing log in credentials with the primary caregiver. Best practice strongly recommends each caregiver have separate email addresses and accounts. Council involvement is necessary to ensure that the request for access to a youth account is legitimate.

For customers who are concerned about excessive communications when providing their email address, they can always update their preferences for marketing emails in the preference center on their MyAccount.

Primary caregivers can request access for additional caregivers migrated with a blank email by calling the council to have the additional caregiver added. (Use the **Customer does not have a unique email in the system** process described below.)

While we do not expect a substantial number of people calling councils attempting to gain access to girl accounts for which they are not caregivers, maintaining security of girl information is important. After migration, if a caregiver calls to ask for assistance to create an account and you see that their email address field is blank but their home mailing address is the same as Caregiver 1, it is most likely this person was the Primary 2 caregiver in the VS 1.0 household and there should not be any concern to allow them access to the account. However, if a caregiver calls to request assistance creating an account and they have a unique email address or the default email address with a street address that does not match Caregiver 1, they likely came from a separate VS 1.0 household and Caregiver 1 should be consulted. See the fourth scenario below. (For more information see the Previous vs. Current State comparison above.)

## Guide

Each scenario is on a separate page for easy reference.

## Customer has a unique email in the system

Existing customers with unique email addresses (typically primary caregivers but may include some primary 2 caregivers) will have been migrated into VS 2.0, so these customers will already have VS2.0 MyAccounts created for them to log into.

These customers will receive an email prompting them to log in their new VS 2.0 MyAccount and create a new password. This will not require any staff intervention and should allow customers full access to manage their accounts online.

If the customer does not receive the email (message goes to junk, gets deleted, or customer just disregards the message) they will likely attempt to log in and use their previous password and get an error message or they might attempt to create new account and the system will identify them as a duplicate. They will be directed to call the council 800 number or to click for case creation for assistance. The council staff should:

**Step 1.** Look up customer in SF global search using each of these

- Email-- If the Person Account is found via the email search go to step 2.
- Phone—If the Person Account is found via search by phone skip step 2 and go to step 3.
- Name-- If the Person Account is found via search by name skip step 2 and go to step 3.

**Step 2.** If the customer is found via the email search, direct the user to enter that email and use the forgot password link to set up a new password. Staff can also go to the storefront (Not using ASM), click the log in button enter the email and do a Forgot Password sequence for the customer. Assign the customer an easy to remember default password (for example: *Badges\*21*) and encourage them to change it to something new after your call. Go to step 4.

**Step 3.** If the customer is found via a phone number or name search, check their Person Account and verify if an email is already provided.

- Email is provided -- If the email does not match what they had been using to access their account, remind the customer of their system email log in and direct them to use the forgot password link to set up a new password. Staff can also go to the storefront click the log in button enter the email and do a Forgot Password sequence for the customer. Assign the customer an easy to remember default password (for example: *Badges\*21*) and encourage them to change it to something new after your call. (If they wish to change their email they can do this in the profile section on their MyAccount.)
- Email was not provided -- If the email is blank or a default email, go to the next section to assist someone who does not have a unique email in the system.

**Step 4.** Before ending the call with the customer ask if there are any other updates they would like to make.

**Step 5.** Thank the caller and end the call. Document interaction on their record as a case.

## Customer does not have a unique email in the system

If the customer did not have a unique email in the system they will migrate with a blank email. When they attempt to log in they will get a message stating that they don't have an account. The duplicate check will flag their first/last name/zip and prevent creation of a new account. They will be directed to call the council 800 number or to click for case creation for assistance.

If they attempt to create an account using other addresses/emails/variations of their name this will start a new account without visibility to their household members.

**Step 1.** Create a case if one has not already been generated.

**Step 2.** Search for person account record in SF (Not ASM) and open.

**Step 3.** Verify adult is from the same household (blank email, same mailing address). Confirm they have an affiliation to the girl.

**Step 4.** Add their unique email address in their Salesforce record. Check "Grant Access to Household". Save. This will trigger the email invite from CDC and create a CDC identity once email verification completes. The link will expire within 24 hours.

At this point, the customer can go to their email and set up their account. After setting up their account they can make the purchase.

**Step 5.** Before ending the call with the customer ask if there are any other updates they would like to make.

**Step 6.** Thank the caller and end the call. Document interaction on the case and close.

## Customer is from separate household requesting access

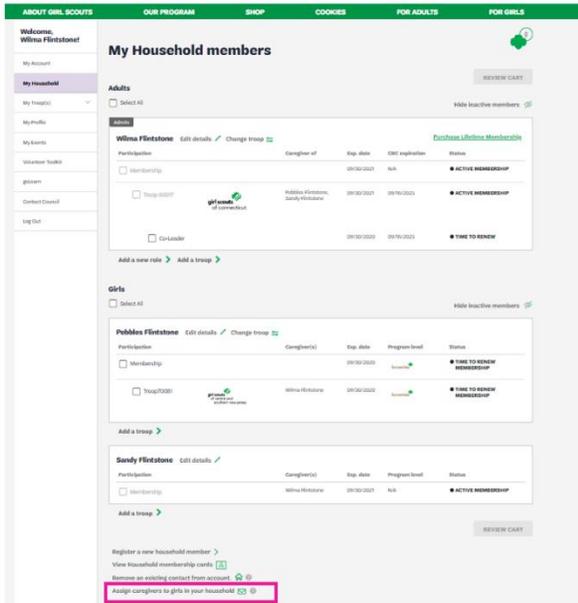
VS 1.0 household structure was built for 2 parent families in the same household. The common workaround for families who did not fit this model was to place the caregivers into separate VS 1.0 households. This unfortunately left one household with access to the girl member and one without.

When a caregiver calls/creates a case to request assistance accessing MyAccount and they have a unique email address with a street address that does not match Caregiver 1, they likely migrated from a separate VS 1.0 household.

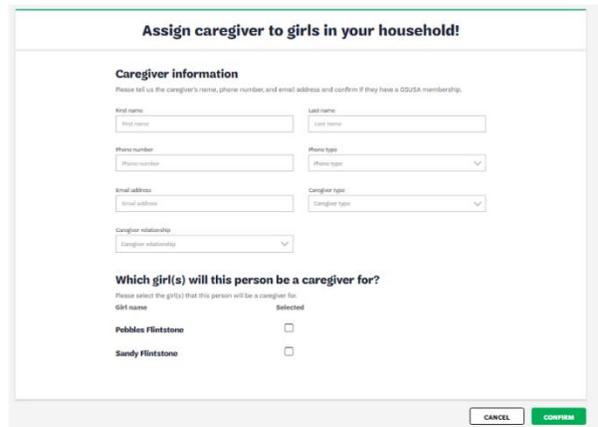
Your council may determine the business process for authenticating that the caller is an authorized caregiver. When in doubt, girl safety is always priority one and caregiver 1 should be consulted prior to allowing a separate household access to the girl's record.

If the caller is not making a purchase currently, there are two options:

- Council can assist caller with accessing caller's MyAccount. See the *Customer has a Unique Email in the System* subsection above. Caller can reach out directly to Caregiver 1 and ask Caregiver 1 to use the "assign caregivers to girls in your household" feature on the Household tab to assign the caller as an "Additional Caregiver". After this is complete, the caller will receive a confirmation email with details on how to access the girl's account. They will be able to make purchases on the girl's behalf.



The screenshot shows the 'My Household members' page. It has a sidebar with navigation options like 'My Account', 'My household', 'My profile', 'My events', 'Volunteer tools', 'glossary', 'Contact Us', and 'Log Out'. The main content area is divided into sections for 'Adults' and 'Girls'. Each section contains a table of members with columns for Participation, Membership, Caregiver of, Exp. date, ORT registration, and Status. At the bottom of the page, there is a link that says 'Assign caregivers to girls in your household' which is highlighted with a red box.



The screenshot shows the 'Assign caregiver to girls in your household!' form. It has a title 'Assign caregiver to girls in your household!' and a subtitle 'Caregiver information'. Below the subtitle is a prompt: 'Please tell us the caregiver's name, phone number, and email address and confirm if they have a GSUSA membership.' The form contains several input fields: 'Last name', 'First name', 'Phone number', 'Phone type', 'Email address', 'Caregiver type', and 'Caregiver relationship'. Below these fields is a section titled 'Which girl(s) will this person be a caregiver for?' with a prompt: 'Please select the girl(s) that this person will be a caregiver for:'. There are two radio buttons labeled 'Pebbles Flintstone' and 'Sandy Flintstone'. At the bottom right of the form are 'CANCEL' and 'CONFIRM' buttons.

- Council can reach out to Caregiver 1 asking permission to create an affiliation in ASM for the caller as Additional Caregiver for the girl member/s and grant visibility to the girl account. After this is complete, caller will have visibility and can make purchases on the girl member's behalf.



# Quick Reference Guide

## Volunteer Systems 2.0

Sample script to the caller/case contact:

*Thank you for reaching out to request assistance to set up an account. We recently updated our system and apologize for the difficulty you encountered and are happy to help.*

*In the interest of girl safety and your time, our Customer Care team will review your household account to ensure that we have all the information we need to properly assist you with any issues you are having and then follow up with a solution.*

\*Reach out, preferably by phone, to caregiver 1 with this sample script to confirm the caller is allowed (or not allowed) access to the girl member's record.

*Improvements in our system now allow for more than one caregiver to access a girl's record for event purchases and membership renewals. A request was received from \_\_ (name of adult) \_\_ to be granted access to \_\_ (insert girl name) \_\_. As the only authorized caregiver listed at this time, I am reaching out to ask for your confirmation to add \_\_ (name of adult) \_\_ as a secondary caregiver with access to \_\_ (insert girl name) \_\_ record. Please respond with your decision as soon as possible.*

If the caller wants to make an immediate purchase:

**Step 1.** Create a case if one has not been generated.

**Step 2.** To provide best customer service and because it would be very unusual for an adult to wish to purchase on behalf of a girl for whom they are not authorized, assist with the purchase in the following manner which allow purchase to be made without granting visibility to the caller. In the unlikely situation that caregiver 1 does not agree the purchase can be cancelled and refunded.

Sample script:

*Thanks for your interest in \_\_ (event) \_\_. Even though access to your MyAccount is still being established, I can help you make this purchase for your girl. In case you wish to inform Caregiver 1 prior to purchase, I want to let you know that when I complete the purchase in the system Caregiver 1 will receive a payment confirmation email and be able to immediately see the details of the purchase in their MyAccount. I will also be able to provide you a receipt via email or USPS. If you wish to continue with purchase, let's get started.*

**Step 3.** Search the events catalog for the event the caller wants to purchase for their girl. Confirm her age and Program Grade Level are appropriate for the event. Make note of the **price** of the event, and the cost of any add on merchandise that caller wishes to add. (Ex: 10-Day Camp session and souvenir camp T-Shirt). Take the caller's **credit card** information.

**Step 4.** In your council shop or resource center run the total of the purchase on the caller's credit card. Keep the receipt.

**Step 5.** Log into ASM using the Caregiver 1 account. Make the purchase as caregiver 1 dropping off before payment.

**Step 6.** Apply payment in Hybris referencing the receipt number received in the shop. Caregiver 1 will receive a payment confirmation email and be able to immediately see the details of the purchase in their MyAccount.



# Quick Reference Guide

## Volunteer Systems 2.0

**Step 7.** Scan and email a copy of the receipt to the caller. Or mail via USPS.

**Step 8.** Reach out, preferably by phone, to confirm that the purchase of the product is approved by Caregiver 1. (You will likely be making this contact at the same time as reaching out to request permission to allow the caller access to the girl record. See \* above.)

*As requested by the caller who is awaiting approval to access the girl record as a secondary caregiver, the council processed a purchase today for your girl. Since it would be very unusual for an unauthorized person to wish to purchase on behalf of a girl, I am calling to verify that you are aware and approve that a purchase of \_\_\_(name of event)\_\_\_ was made by \_\_\_(name of adult)\_\_\_ for \_\_\_(name of girl)\_\_\_\_. You will find all the details and links to this event in your MyAccount. If you do not wish for your girl to attend this event, a cancellation can be processed. Please reply with your approval or non-approval for the event purchase.*

**Step 5.** If the purchase is accepted. Document discussions and close the case.

**OR Step 5a.** If the purchase was not accepted by Caregiver 1, apologize for the situation, and assure the Caregiver that the event purchase will be cancelled. Because the purchase was made in Caregiver 1's ASM no private information was shared with the caller requesting to make the purchase.

Communicate with the original caller and issue a refund. Because this type of situation would be unusual and sensitive, a "stock" response is not provided. Please consult your supervisor for instructions to respond. Document discussions and close the case.

## Customer does not have an email address

Every adult person account in SF needs an email to be created. When a customer does not have or does not provide an email address (or does not wish to accept the online privacy policy and terms and conditions) use the following default email naming convention of [fname.lname.YYMMDD@noemail.gs](mailto:fname.lname.YYMMDD@noemail.gs) When assigning the YYMMDD use the date you are creating the account.

Customers not using email would be likely to rely on the troop leader for event registration, renewal, etc. If customer care is assisting this customer via ASM, instead of searching for the customer as recommended with their email, search by the customer's phone number or name and then verify correct customer record by asking for birthday or mailing address.

## System Interactions

Salesforce Lightning (CRM)	<ul style="list-style-type: none"> <li>•Source of Truth for all person account info</li> <li>•Integrates with CDC to create accounts</li> </ul>
Hybris (eCommerce)	<ul style="list-style-type: none"> <li>•as adults are added as admins on the household MyAccount they are updated from contact to customer.</li> </ul>
NetSuite (Finance)	<ul style="list-style-type: none"> <li>•n/a</li> </ul>

## Additional Support

*Hyperlinks coming soon*

Intro to Assisted Services Mode (ASM) within the VS 2.0 Orientation Course Available in the VS 2.0 - 01 –Essentials Learning Path.