NEON BASICS

General notes:

- NEON is the CRM (customer relationship management software) used to track the clients, volunteers, staff, and associated companies (e.g., Trainers) for TLC
- Each client, volunteer, staff, and associated company has its own record; some linked (e.g., an individual Trainer and their company).
- Client and volunteer records are created after an individual fills out an application or registration form on the TLC or Companion Paws websites. The data on the form is exported from the website and imported into NEON by the Executive Assistant.
- Each volunteer manager/administrative staff has been given access to NEON so that they may research and/or update individual records as pertains to their role (e.g., tracking clients seeking or having obtained certification; tracking Foster Volunteers; tracking Visiting Teams and their clients) . Key staff (e.g., CEO) pull reports from NEON for varying data requirements.

The NEON Overview

NEON has several key areas used by the various TLC managers, depending on their role. Each area is shown across the top of the page in titles like Accounts, Tools, Reports, Memberships, etc. Our CEO customizes each manager's access according to need. Senior leadership (e.g., CEO) will use the broadest range of these areas.

To enter an area, hover the mouse over the title and click. Each area has sub-sections; select the applicable section as needed.

NOTE: most users will not need to enter many of these areas and instead will exclusively be accessing and managing individual records, as described in the next section:

Working with Individual Records:

1. **Opening an individual's record**

   From any screen in NEON, start typing the desired individual's first and last name in the Search bar at the top left (beside the NEON CRM logo). Hover the mouse over and click on the record name once the desired individual's name comes up in the drop-down window that appears.

   NOTE: If you are uncertain of the correct spelling, that is OK, as generally NEON gives all the closest selections; also, you can use either a first or last name or both for a quick search.

   Once you have opened the record, double check you have the correct person (e.g., if you were looking for a Foster Volunteer by name, verify by looking through the record that the person selected is in fact a Foster Volunteer)

2. **The Record Components**

   On the left side of the screen is a list of the various records components. Hover your mouse over the desired component and click to open that part of the record. Following is a description of the Components most frequently used:

About – Demographic information on the individual. Scroll down through the record (multiple pages long) to see the type of record – an individual may have multiple sections with details. At the top is the contact information. Scrolling down you will see there are separate sections on this page for Account Details (people seeking certification); Dog Information (e.g., a dog being certified, trained, or adopted; Therapy Dog Application details; Volunteer Information – application details; Foster Application details; Visiting Therapy Requests details; Assisted Therapy Dog and Visiting Therapy Dog survey details; and Dog Rescues. After the original import from our website, the About information is regularly updated/expanded as more details are known and/or the individual's relationship with TLC evolves.

- **To change or add details in the About page**, click on Edit (top right corner). Scroll down to the field to be edited and type in information as applicable; then push Save (top right corner). NOTE: Do not delete or change records unless this is specifically mandated by your role or requested by TLC leadership.

Timeline – used to understand the milestones of the individual's record from the point the account is created onward. For example, once a Standards of Conduct/NDA is signed and added to the person's record (under NOTES – see below), this milestone will show up on Timeline.

Event Registrations – used to register/track events that the individual has been invited to/attended. For example, when a client attends a Temperament Assessment, this will be shown as a registered event for the individual (linking to an Event that is created on the Events section of NEON)

Notes – This is where we upload key documents provided by the individual. For example, all volunteers and trainers will have a signed Standards of Conduct/NDA uploaded here. Other forms that would be uploaded here include Assessment Evaluation sheets; Foster Agreements; Adjudicator Agreements and Waivers; Letters from Healthcare Providers supporting dog adoption; etc. In addition, general notes will be recorded here for things such as a unique agreement made between TLC and the individual.

- **To upload a document** - On the right-hand side, click the New Note button; add the name of the document that you are uploading as the Title; add a note of what the document is in the Note Text box; under File Upload, click to upload document (repeat for all separate documents being uploaded); Click Save
- **To simply add a note** – On the right-hand side, click the New Note button; add the name of the note (simply summary) as the Title; add note in the Note Text box; Click Save
- **To Pin a Note (for a flag on the about Page)** – hover over the 3 dots on the note at the right side of the page; select pin note from the drop down that appears
- **To Edit a Note or Delete and Note** – hover over the 3 dots on the note at the right side of the page; select edit or delete as applicable. NOTE: only delete a note if specifically guided to do so or if you realize you have added a note in error; do not delete others' notes

Sent Emails –

When a general communication is sent out by our CEO, these show up under the NEON CRM Emails tab.

When a manager or administrator sends an email to any individual from one of TLC's webmail accounts, that e-mail will show up under **External Emails** (as all correspondence from webmail is BCC'd to NEON). To open External Emails, hover and click over the words (center of screen).

- **IMPORTANT:** When corresponding with an individual from Web Mail, be sure to always send the last e-mail (e.g., "Thank you") because that will ensure the latest version of the conversation shows on the individual's Sent Emails record in NEON.

More about NEON? – advanced usage

For more detailed instructions regarding NEON (specific instructions for specific roles) visit this page https://thelifelinecanada.ca/neon-management-software/ (accessed through https://thelifelinecanada.ca/volunteer-resources/)

WEBMAIL FUNDAMENTALS

Our webmail platform is RoundCube v. 1.4.12 and our Host is InMotion (which dictates the specific configuration and functionality of TLC's RoundCube, e.g. If doing a web search for 'how to' guides the views of this software vary depending on the host).

Each manager function has been given a separate webmail account/address within this platform. See https://thelifelinecanada.ca/volunteer-resources/ for a complete list of the various addresses. You will have been given a link, plus email address and password to access the webmail address(es) applicable to your role. NOTE: our CEO has access to all webmail boxes and is copied on most incoming correspondence.

- The following resource link (albeit specific to v. 1.1) MAY be helpful for some of the basics in using our webmail: https://docs.roundcube.net/doc/help/1.1/en_US/ (although some of the details differ from our view of RoundCube)

BCC to NEON:

As noted in the NEON section above, all correspondence from TLC webmail to an individual who has a record in e-mail is copied through a BCC. All volunteers and staff of TLC have a NEON record, so if their home or TLC e-mail address is used in correspondence, a copy of that correspondence will show up in the External Emails section of their NEON record. The same applies to our clients – if they have a record in NEON, correspondence from any TLC webmail account will appear in their record.

- **It is essential that:**
  1. The BCC not be removed when sending correspondence to a person who has a record in NEON, and
  2. If you want a copy of the correspondence to go into the person's record (e.g., they have agreed to something, or answered a key question), you must have the 'last word.' By your action of responding, you will enable the details of the correspondence to be archived in NEON.

Specific functions/activities/tips that will help you maintain your webmail with efficiency:

1. **To send an e-mail** – click on compose. NOTE 1: if you wish to save a draft before sending, click on "Save" on the top bar, which will put the e-mail into the Draft folder. Double Click on the draft email to reopen it. NOTE 2: if you change your mind and do not want to send an email you started, simply hit the back arrow (a caution will come up indicating your draft may not be saved).

2. **Special formatting** – When sending an e-mail, the formatting will be very basic, and things like bolding and hyperlinks will not show. To improve the look of your e-mail, click on the HTML symbol in the bar below the Subject line. Select OK and formatting options will be added to the email bar, plus hyperlinks will become live**.**

3. **Once you have read and actioned an email,** decide if you need to archive or can delete it. It is important to do this regularly to prevent an unmanageable amount of correspondence building up in your in-box, making it unclear if something has or has not been actioned. If the correspondence is with another person who has a record in NEON, then you may not need to save the e-mail. However, if the correspondence is with an external party (e.g., answering a general inquiry), they will not have a record in NEON; therefore, consider if you need to save the correspondence in a folder (see #4).

4. **Creating folders –** Many of the managers customize their webmail boxes to increase their efficiency. One of the best ways to do this is to create folders. Once a folder is created, completed correspondence that must be saved (see #3), can be moved into that folder (see #5 for moving instructions). Here is how to create a folder:
   - Open Settings (left side)
   - Click Folders
   - Click Create (on bar top right)
   - Enter a name for the new folder in the properties form on the right
   - Select a parent folder or — to create the folder on top level
   - Click the ***Save*** button below the form to finally create it
   - Click on Mail (left side) to return to main mailbox

5. **Moving files into folders –** Click on the applicable e-mail to be moved; click on 3 dots on bar at top right; select 'move to' which will open list of folders; click on folder that you want to e-mail to land in. Alternatively: Click on and drag the e-mail from the inbox into the applicable folder listed on the left side of the screen.