

Qrew Bulletin Board

NEW: Fastfield Office Hours

Monday, Wednesday, Fridays
at 2pm EST

[Quickbase.com/events](https://quickbase.com/events)

Office Hours Update

With Sam Trachy
Everyday 1pm EST
Sign up on the Events Page!



[Quickbase.com/Events](https://quickbase.com/Events)



Coming SOON

**December 2023
Customer Network
END OF YEAR Survey!**

More details to during announcements . . .

Apply to be Qrew Champion!

The Qrew Champions program is for passionate Quickbase customers interested in advocacy and community leadership opportunities

Connect with Me



Have questions, want to do an app showcase, or need help connecting with another network member?
Reach out to Esther LaVielle
elavielle@quickbase.com

Upcoming Qrew Events

December 12th 12 EST
Pipelines Network Qrew

December 12th at 1pm EST
Retail/Real Estate Network Qrew

December 11 & 12th 2pm EST
2024 Tech Strategies & AI

December 14th at 12pm EST
Feature Focus: 2023 in Review

January 17th 12 EST
**NEW: Mobile Workflow Qrew
Launches**



Education/Non-Profit Customer Network Qrew

Thursday December 7th, 2023 at 10am EST



On our Agenda today ...



- Introductions: Hello New Attendees !
- Guest Speakers: Emily Lundberg & Brendan Fogarty - Horizons for Homeless Children
- Audience Q & A
- Announcements and Housekeeping

Your Qrew Administrator



Esther LaVielle

Customer Success Manager

- Taking over for Jenn Richardson
- Quickbase CSM since Jan 2022
- Worked in SaaS Tech 15 years
- Mom of a toddler and a grumpy old puppy
- Located in Portland, OR



Introductions

Let's get to know you!

Name:

- Where are you located: (City/State/Country)
- Company Name and job title
- How long have you been using Quickbase?
- How do you use Quickbase in your organization?



Guest Speaker



Emily Lundberg

Data Operations and Analysis Senior Manager
Horizons for Homeless Children



Brendan Fogarty

Chief of Staff
Horizons for Homeless Children

Horizons provides free Early Education (ages 0-5) for children experiencing homelessness in the Greater Boston Area. We also provide mentoring and support for the children's families while they are enrolled.

Our Playspace program separately manages a group of over 700 volunteers that serve at shelters statewide.

- Emily and Brendan started at Horizons about 2.5 years ago
- We overhauled our entire Quickbase platform with the help of TEC Kevin Slider
- In the last 2 years we've created custom applications for tracking client information and student classroom movement, volunteer management, internal support requests, policy tracking, and more.

Challenges and Solutions

Challenge

- Horizons needed an information tracking system which supports our two-generation model of service
- “Out of the box” software for childcare centers don’t meet our unique, mission-driven needs

Solution

- Built a Quickbase application with 70+ tables to support student classroom tracking as well as documentation of parent/guardian mentoring



Challenges and Solutions

Challenge

- Horizons needed a volunteer management system to track over 700 PALs that volunteer at 50+ homeless shelters statewide in our Playspace program each year
- This includes tracking the shifts that run once a week at these shelters where volunteers play with the children for 2 hours

Solution

- Built a Quickbase application with over 30 pipelines supporting it to manage the onboarding, training, and assignment of volunteers across the state
- This application saves Horizons the equivalent of 2 FTEs





Horizons Playspace App Showcase!

Playspace Application Data Model

PAL Information

- We track PAL applications, documents, background checks, and training attendance

Shelters

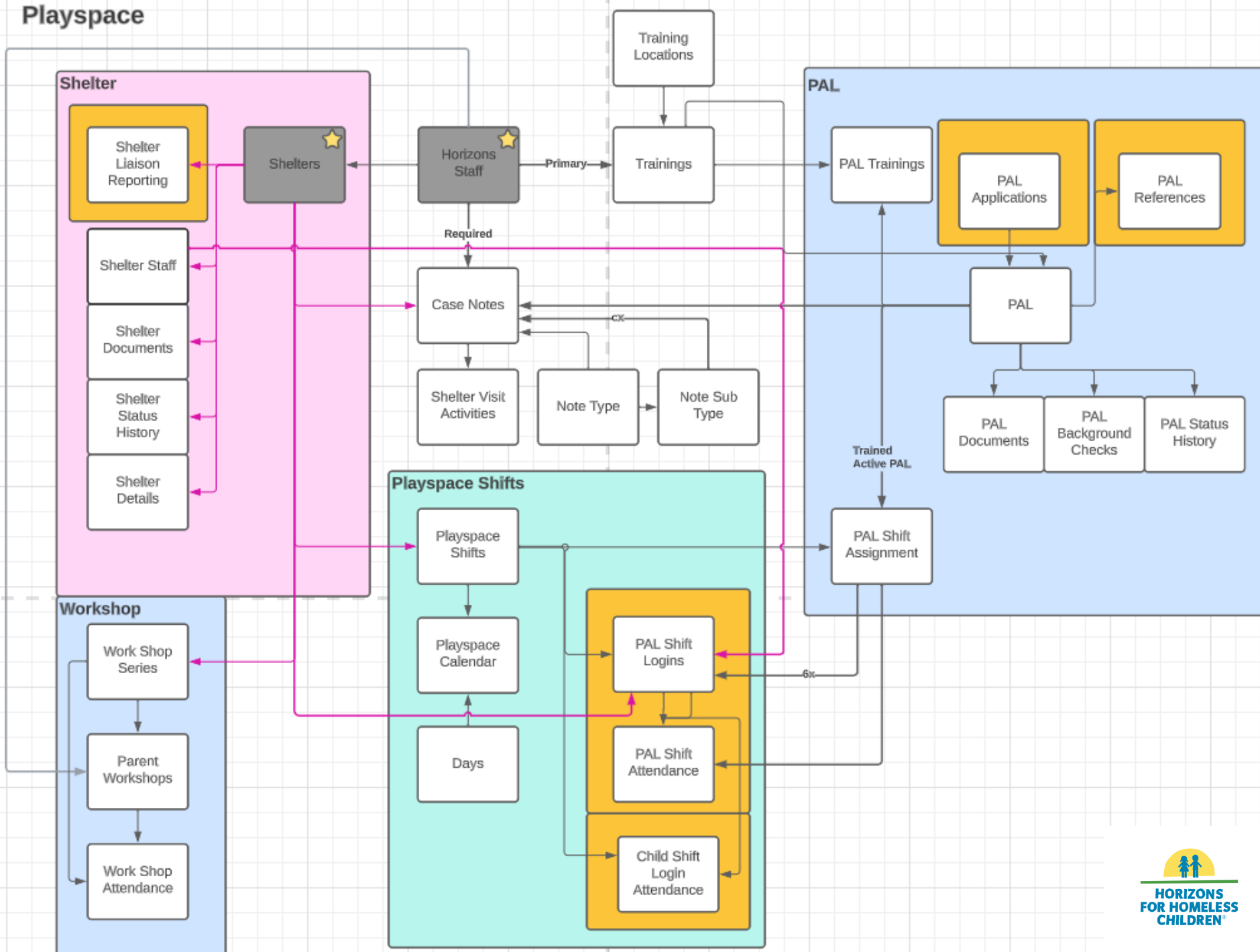
- Horizons staff maintains data surrounding the shelters that we work with across the state including the how many volunteers are needed to serve that shelter

Shifts

- Volunteer shifts are created for each shelter and PALs are assigned to shifts.
- PALs need to take attendance at each shift

Other

- Case notes and workshops held at shelters are also tracked



Applying to Be a PAL

People can access the EOTI PAL application via link/QR code and submit an application from desktop or mobile



Apply to be a
PAL Here!

Basics

Do you have at least two hours per week and a minimum of six months you can commit to volunteering as a PAL? *

Where did you hear about the Playspace Program? *

Please Specify *

Provide your general information

First Name *

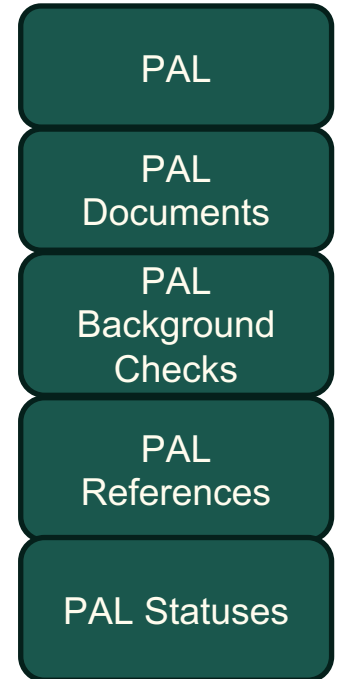
Preferred/Nickname

horizons.quickbase.com — Private



A pipeline collects all the information from a PAL application and disperses it into different tables

This allows us to lock down EOTI access to one-way PAL application submission, never exposing any other data



PAL Onboarding and Training

<input checked="" type="checkbox"/> <u>PAL Initial Training First Email (Needs CORI)</u>	Sent whenever PAL Training records are Added
<input checked="" type="checkbox"/> <u>PAL Training Completed (Initial - Needs CORI)</u>	Sent whenever PAL Training records are Modified
<input checked="" type="checkbox"/> <u>PAL Training Did not Attend (Initial)</u>	Sent whenever PAL Training records are Modified
<input checked="" type="checkbox"/> <u>PAL Training Completed (Initial - Has CORI)</u>	Sent whenever PAL Training records are Modified
<input checked="" type="checkbox"/> <u>PAL Initial Training Reminder (Has CORI)</u>	Sent whenever PAL Training records are Modified
<input checked="" type="checkbox"/> <u>PAL Training Reminder (All else)</u>	Sent whenever PAL Training records are Modified
<input checked="" type="checkbox"/> <u>PAL Initial Training First Email (Has CORI)</u>	Sent whenever PAL Training records are Added
<input checked="" type="checkbox"/> <u>PAL Initial Training Reminder (Needs CORI)</u>	Sent whenever PAL Training records are Modified

PAL Applies

When a PAL applies, they receive an automatic notification from Quickbase with information about next steps and a Zoom link to the training they signed up for



PAL Gets Trained

When a PAL is trained, they receive an automatic notification from Quickbase asking for their background checks and references



PAL References

References that are submitted on a PAL's application are automatically sent a link to fill out a reference form that gets attached to the PAL profile via pipeline



PAL Documentation

PAL documents submitted on application are created as document records via pipeline. Horizons staff adds further documentation manually.



Example PAL Page

The top part of the profile gives our program managers a snapshot of important PAL information

Full Name Test Test	PAL Status Active	Current Status Duration (Days) 0	
Main Phone (12) 345-6789	Main Phone Type Work	Personal Email test@test	
Do Not Contact Icon	VIP Icon ★	VIP Notes	Under 18 Icon <input type="checkbox"/> Opt out of Text
Maximum CORI Date	First Training Date 06-07-2023	Last Training Date 06-07-2023	<input type="checkbox"/> Check File
First Attendance Date	Total # of PAL Shift Attendances 0	Current Active Shift Assignment Horizons for Homeless Children - Monday - 10:00 am - 12:00 pm	
Shelter Region Greater Boston			
Referral Type Social Media (Facebook, Twitter, Instagram)	Referral Details test	Accessibility Notes	

PALs are assigned to one or more active shifts

Related documents, trainings, shifts, and more are assigned to a PAL from their page

> **Color Coding**

PAL Profile	Shift Assignments	References and BG Checks	Case Notes	PAL Documents	Trainings	Application Details	PAL Records	Admin
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∨ **PAL Documents**

Full Report Grid Edit Email More ▾ 1 PAL Documents					Add PAL Doc
<input type="checkbox"/>	Document Title	Document Date	Document Type	Details	
<input type="checkbox"/>	ID	11-20-2023	PAL ID Photo		

Shift Management

Horizons Playspace has over 100 shifts a week scheduled at 50+ shelters across Massachusetts

Each shift has 2-15 volunteers

October 2023

Monday	Tuesday	Wednesday	Thursday	Friday
	Open Tuesday	Open Wednesday		
	Open Tuesday	Open Wednesday		
	Open Tuesday	Open Wednesday		
	Shelter Cancellation Tuesday	PAL Cancellation Wednesday		
23	24	25	26	27
Open Monday	Open Tuesday	Open	Open Thursday	Open Friday
Open Monday	Open Tuesday	Open Wednesday	Open Thursday	Open Friday
Open Monday	Open Tuesday	Open Wednesday	Open Thursday	Open Friday
Open Monday	Open Tuesday	Open Wednesday	Open Thursday	
Open Monday	Open Tuesday	Open Wednesday	Open Thursday	
Open Monday	Open Tuesday	Open Wednesday	Open Thursday	
Open Monday	Open Tuesday	Open Wednesday	Open Thursday	
Open Monday	Open Tuesday	Open Wednesday	Open Thursday	
Open Monday	Open Tuesday	Open Wednesday	Open Thursday	
Open Monday	Open Tuesday	Open Wednesday	Open Thursday	

Horizons staff can manage shifts from this calendar. When a shift is cancelled, all PALs assigned to that shift are automatically notified through **Twilio** using a pipeline integration

When a new shift is opened, a pipeline creates calendar records for that shift from the start date onward. This pipeline runs monthly, creating all shifts for the month. When a shift closes, future calendar records are deleted and are no longer created.

Shift Attendance Tracking

Playspace Shift *

Monday - 10:00 am - 12:00 pm

Date of Shift *

11-20-2023

Total number of children who visited Playspace during this shift *

3

Was this shift indoors or outdoors? *

Indoors

Is there anything that Horizons staff could do to support this shift or Playspace? Substitute PALs or requests for child rosters can be included in this field as well.

At the end of each shift, the PALs assigned to that shift receive a link to enter attendance via **Twilio**

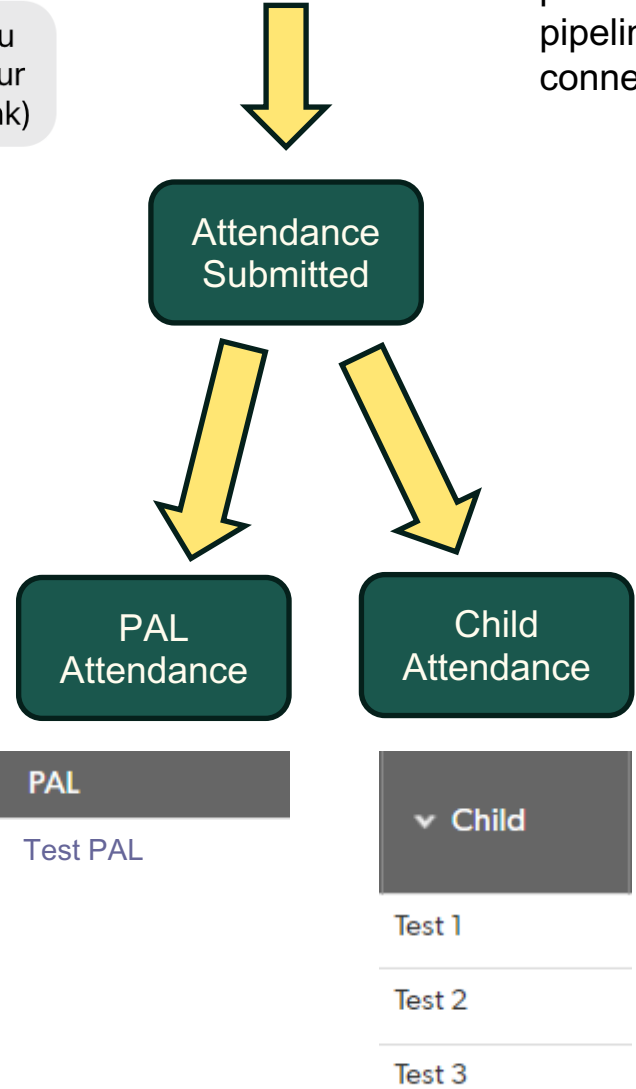
Thanks for playing! As you clean up, please enter your shift attendance here! (link)



Twilio is a texting/calling platform that Quickbase pipelines have a native connection with

PALs submit shift attendance for PALs and children on their mobile phone

This allows us to see that we've served over 2,000 children statewide in 2023!



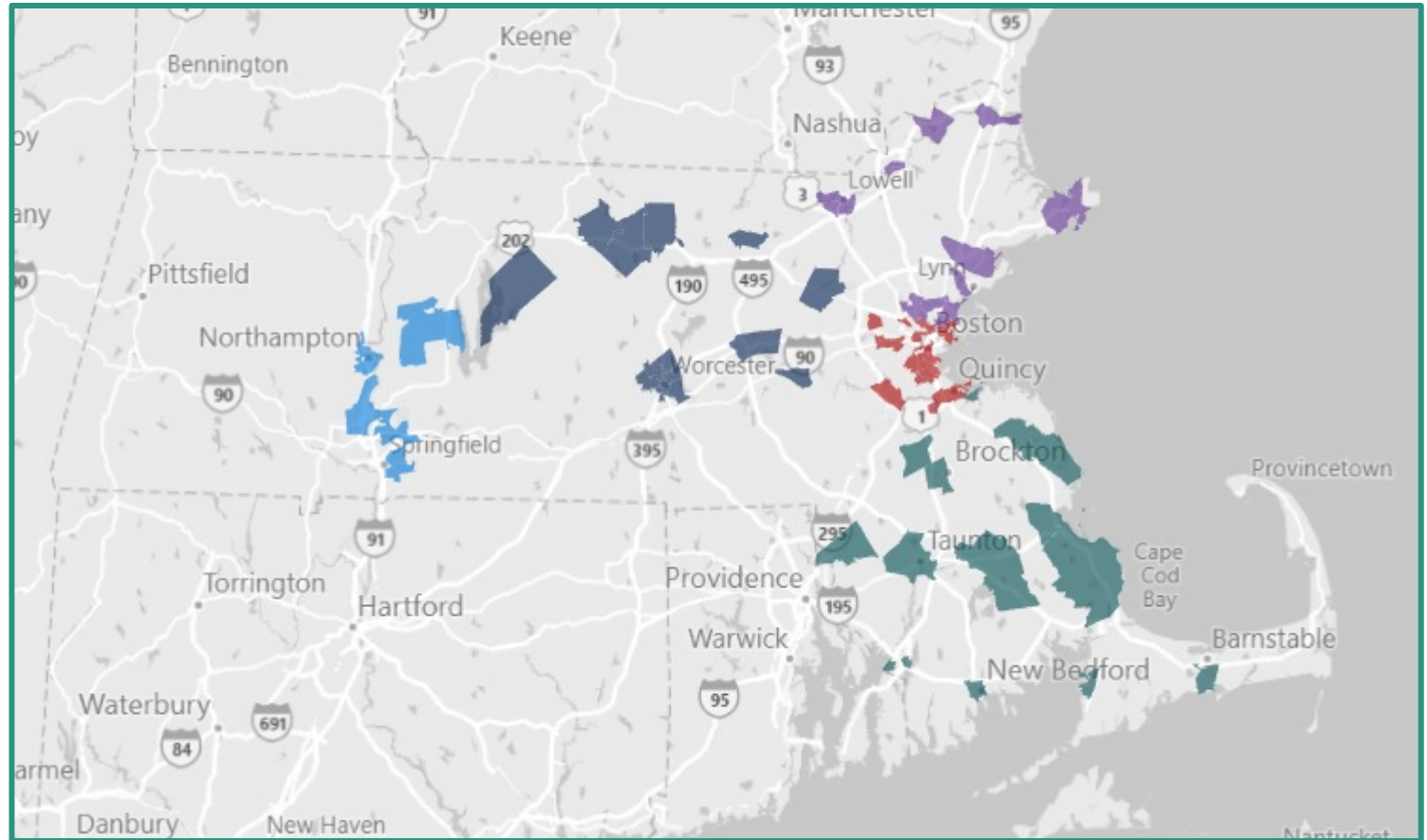
On submission, a pipeline creates individual attendance records so we can calculate attendance rates for individual PALs and children

Reporting and Impact

We use **the native API connection** between Quickbase and Power Bi to create extensive dashboards for tracking internal and external KPIs and trends

It is estimated that using Quickbase has saved our Playspace team the amount of time of two full-time FTEs

- Shifts and attendance that used to be manually tracked in google sheets are now collected in Quickbase and reported on automatically
- Onboarding and training reminders and emails that used to be sent manually are now automatically sent through Quickbase
- Entire PAL profiles and documentation which used to be filed manually have been discarded





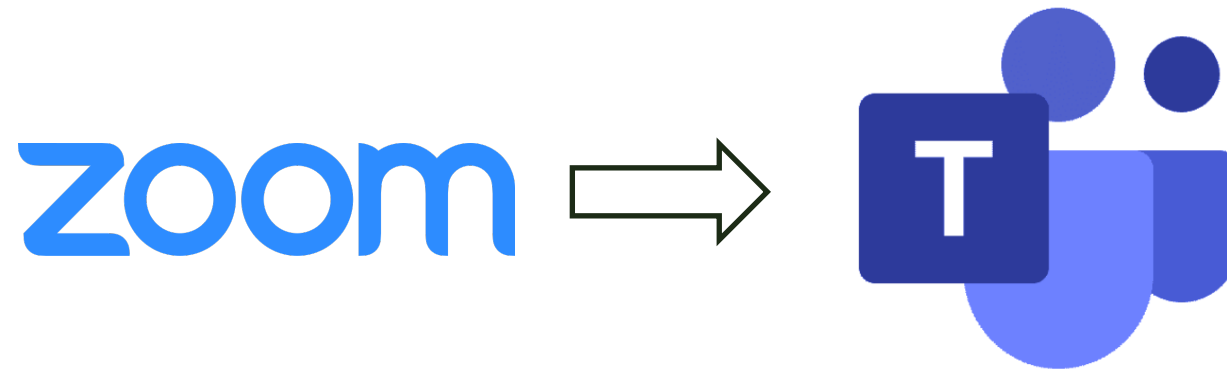
Ask the Presenter

Q & A Session

Qrew Announcements



**Quickbase officially from
Zoom to Microsoft Teams
November 1st, 2023**



We are launching two new Customer Network Qrews!



App Builders

- Focused on all things **building!**
- **Learn tips/tricks** to improve your building and updating skills!
- Product team experts **SME's** available at each call
- Building Tables
- Relationships – to – Relationship
- Forms, Formulas, Customizations
- **Next meeting:** Thursday, January 25th @12pm EST



Mobile

- For all customers who either use or are interested in Quickbase Mobile or FastField
- Mobile Product Team from Quickbase Mobile & FastField will be our **SME's** in attendance each meeting!
- **Join** to discover use cases, AMA with experts, and share feedback and challenges for product team to address
- **Kickoff:** January 17th 2024 @ 12pm EST



Welcome to Qrew Discussions

Your Qrew is waiting for you.

community.quickbase.com/all-user-groups

Bookmarks Menu TTS research IADs



Retail/Real Estate
Customer Network
Qrew

[Read More >>](#)



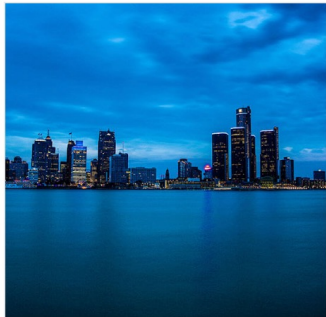
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Public
Sector/Government
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Detroit Qrew Group

[Read More >>](#)



Salt Lake City Qrew
Group



Seattle Qrew Group

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We are Live on Qrew Discussions!

A place where customers of all types,
Quickbase partners, and experts gather!

- We have our own Qrew Discussion page
- Pre and Post-meeting updates will posted
- Use to share, ask questions and continue conversations with each other!

Quickbase Smart Builder & Data Analyzer AI Beta is available!

Learn more at the Feature Focus webinar 10/24/23

Create a new app

Answer a few questions and we'll build you an app. Don't enter data or information that could be confidential or sensitive. For best results, add as much detail as you can.

What industry are you in? *

What do you want your app to do? Or what problem are you trying to solve? *

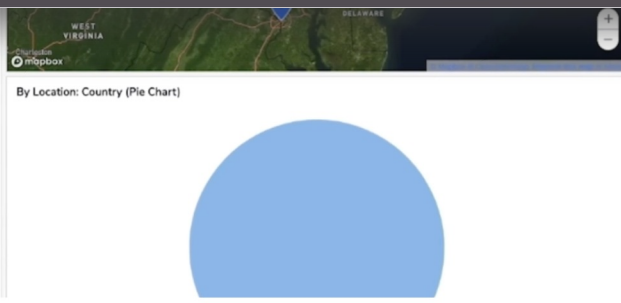
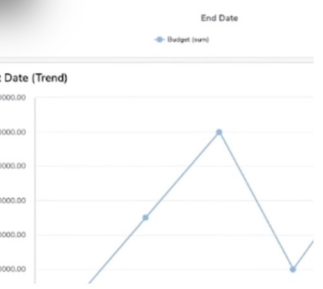
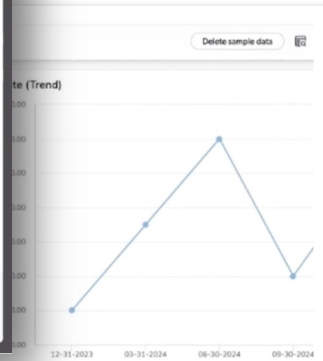
E.g. manage an inventory, track project progress, handle audits

What do you want to track, report on, or manage?

This can be types of assets, information, or parts of your workflow, like: team tasks, installation schedules, product inventory, customer contacts

[Get writing help or see an example](#)

Cancel **Create**



Data Analyzer

Where is the data you want to analyze?

App that contains your table*

The specific table to analyze*

What is the outcome you want to predict?

Field to evaluate* Churn

Value to predict* Checked Not checked

Advanced data settings

Data source based on

Date field used for time period

Model name*

Cancel **Analyze**

When	Outcome	Value
When Contract is Month-to-month	MUCH MORE likely.	0.40
When tenure is higher	your outcome is LESS likely.	-0.36
When OnlineSecurity is No	your outcome is MUCH MORE likely.	0.34
When TechSupport is No	your outcome is MUCH MORE likely.	0.33
When InternetService is Fiber optic	your outcome is MUCH MORE likely.	0.31
When Contract is Two year	your outcome is MUCH LESS likely.	-0.30
When PaymentMethod is Electronic check	your outcome is MUCH MORE likely.	0.30
When OnlineBackup is No	your outcome is MUCH MORE likely.	0.27
When DeviceProtection is No	your outcome is MORE likely.	0.25
When InternetService is No	your outcome is MUCH LESS likely.	-0.23

Customer Network

End of Year Survey

December 2023

Your feedback is
important to this
program!



Thank you for joining!

