



Getting Started in Salesforce

Introduction and Tips for Using the ILR Salesforce Org

Goals

- Introduction to navigating in Salesforce
- Brief review of the Outreach form
- Activities Forms vs Sessions – where the data lives
- Introduction to the field list
- View and create reports
- Communicate with people about specific forms using Chatter

Logging in to Salesforce

1. Browse to <https://ilroutreach.lightning.force.com>
2. Click the "Cornell Single Sign-On" button:



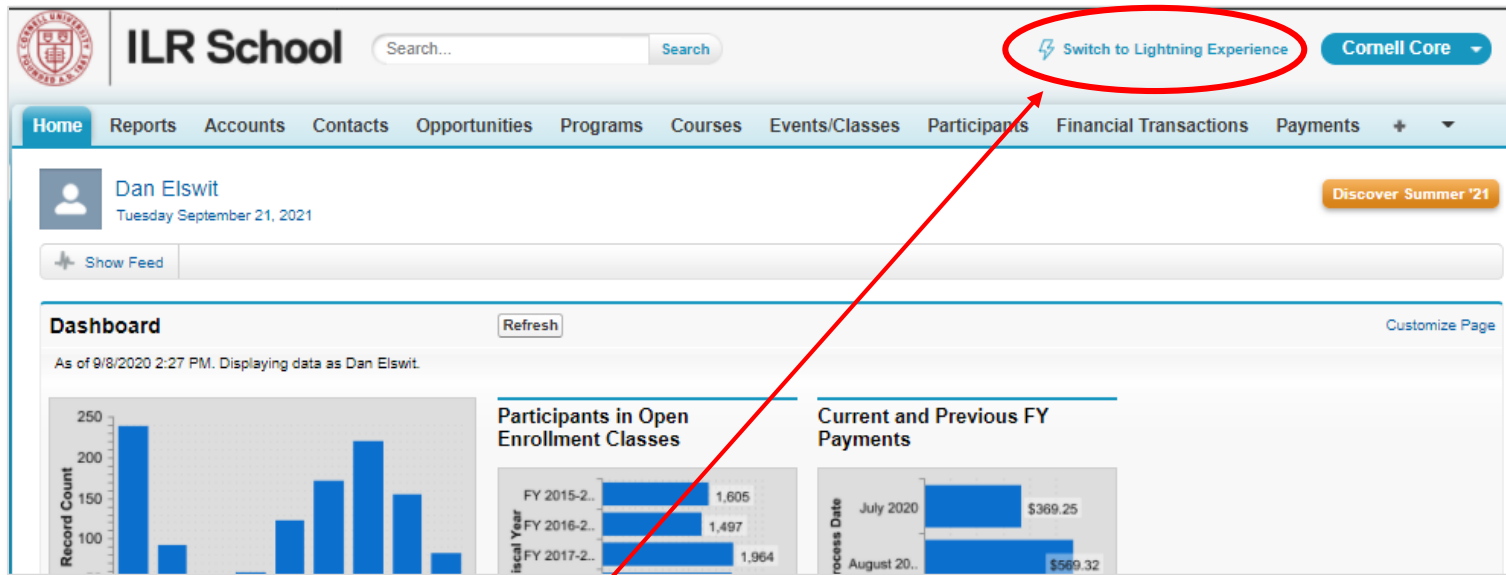
3. Log in as usual to the Cornell CUWebLogin page
4. In a moment you will be brought to the landing page that has been assigned to you based on your role in Salesforce.

The Lightning User Interface

1. Salesforce updated to a more modern system based on international web development standards in 2015
2. The new system is called “Lightning”
3. The old system became known as “Classic”
4. As of early 2019, Classic no longer receives new features and updates
5. ILR adopted Lightning in summer of 2019 but has continued to support Classic for legacy compatibility in some situations
6. All new development, including the Outreach Activity form is only supported in Lightning
7. You can switch back and forth between the two interfaces at will

Switching to Lightning

1. If your user interface looks similar to the screenshot below, you will need to switch to Lightning to use the Outreach Activity Form



The screenshot displays the ILR School user interface. At the top right, a link labeled "Switch to Lightning Experience" is circled in red. A red arrow points from this link down towards the second step of the instructions. The interface includes a search bar, a navigation menu with items like Home, Reports, Accounts, and Participants, and a dashboard with various charts and data tables.

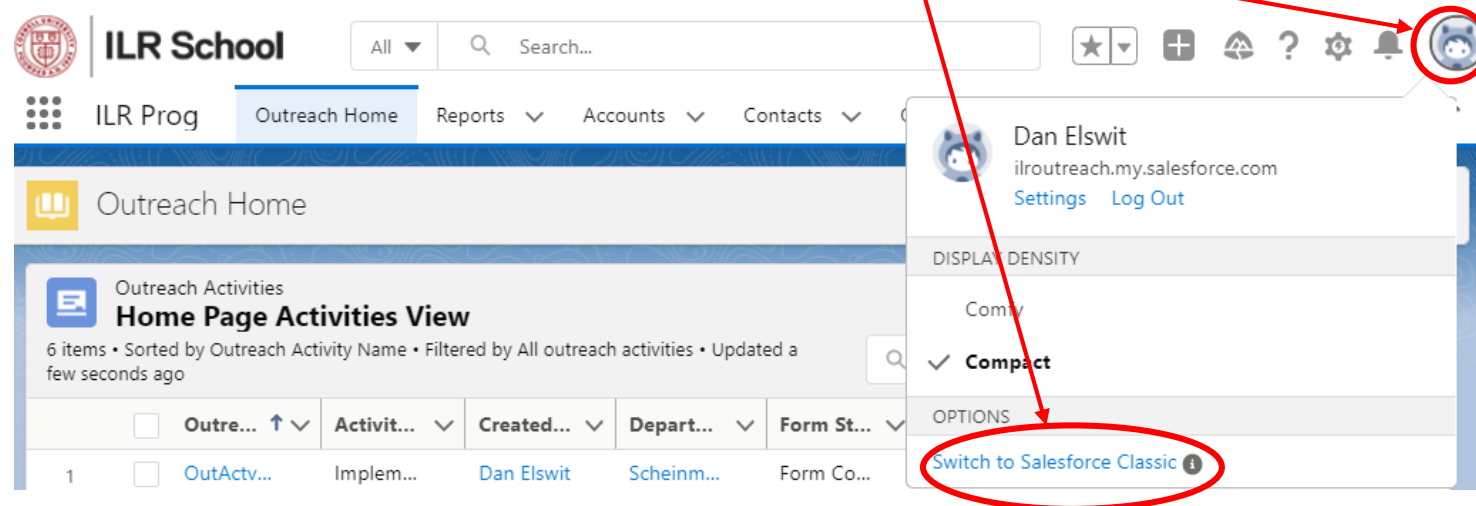
Local Year	Participants
FY 2015-2016	1,605
FY 2016-2017	1,497
FY 2017-2018	1,964

Process Date	Amount
July 2020	\$369.25
August 2020	\$569.32

2. Click the "Switch to Lightning Experience" link at the top right

What About Switching Back to Classic?

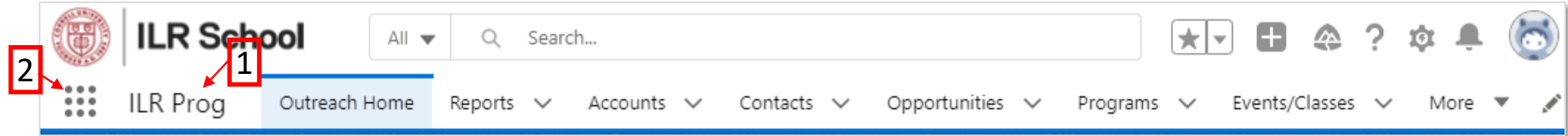
1. Hopefully, you will not need to switch back to Classic. Over 90% of Salesforce is now Lightning-compatible
2. However, certain job roles, especially related to Fiscal may still require Classic access
3. To switch back to Classic, click the face icon at upper right, and choose “Switch to Salesforce Classic”



The screenshot shows the Salesforce Lightning interface for the ILR School. The top navigation bar includes the ILR School logo, a search bar, and several utility icons. A red circle highlights the user profile icon (a face) in the top right corner. A red arrow points from this icon to the user profile dropdown menu. The menu shows the user's name, 'Dan Elswit', and the URL 'ilroutreach.my.salesforce.com'. Below this, there are options for 'DISPLAY DENSITY' (Compact) and 'OPTIONS'. The 'Switch to Salesforce Classic' option is highlighted with a red circle and a red arrow pointing to it.

Outre...	Activit...	Created...	Depart...	Form St...
1	OutActv...	Implem...	Dan Elswit	Schein...

Navigating: Apps



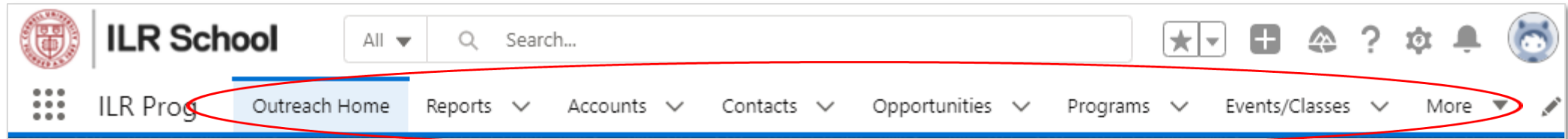
1. Apps

- Apps are groupings of tabs related to a role or function. Apps each have a name. The most common one in use in ILR is called "ILR Prog"
- Recently accessed items are also found under relevant tabs

2. The Waffle selects your App

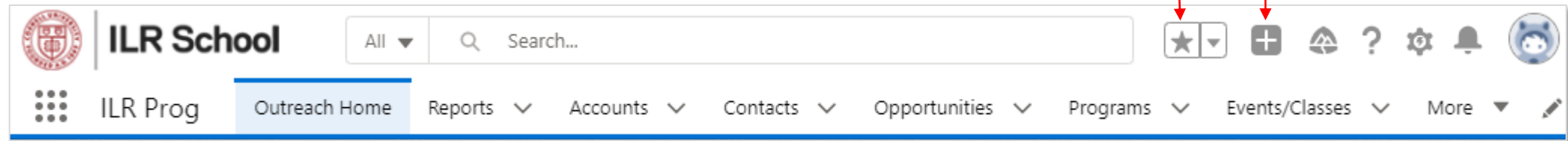
- Click the waffle and begin typing the desired item, for instance "ILR P" will highlight the ILR Prog app and allow you to select it by clicking on it
- All Salesforce objects can be found here individually as well

Navigating: Tabs



- Viewing data
 - Click tabs to display data from the named object
 - Click the down-arrow next to the tab to see your recently accessed data for the object
- Adding additional tabs
 - Click the Pencil icon at the right-hand end of the tab bar to add additional tabs
 - Viewing lists or records in Salesforce will create temporary tabs
 - To make any temporary tab permanent, click the down-arrow next to it and choose "Add to Nav Bar"

Navigating: Favorites and Quick Actions



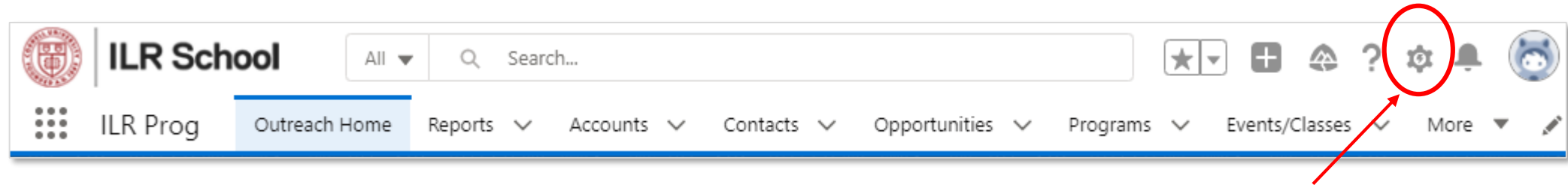
1. Favorites

- Mark any page in Salesforce as a favorite (for example, any Activity Forms you are currently working with), and refer to them by clicking the drop-down arrow next to the star
- To edit the favorites list, click the drop-down arrow and select "Edit Favorites"

2. Quick Actions

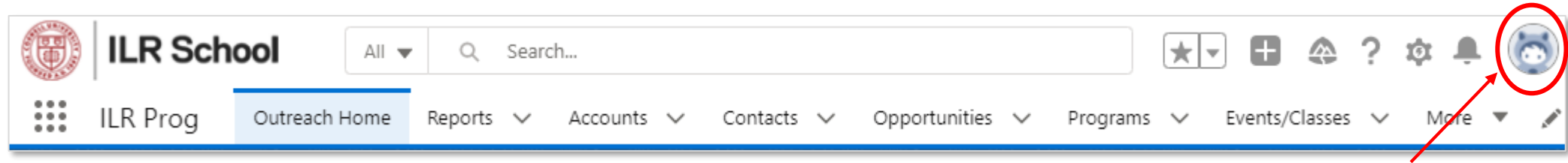
- Click the plus to create common items quickly. Note that the Outreach Activity Form is not included here currently.

System Settings – Nothing to See Here



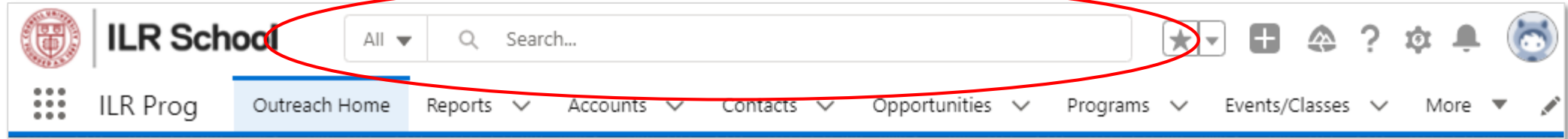
- The gear icon is for accessing Settings
- Occasionally there are reasons to go into Settings, which is why the icon is visible, but in general, do not click the Settings icon
- If you go into Settings, your familiar tabs will vanish and search will not work as you expect
- If this happens, click the Waffle and choose your desired app (likely “ILR Prog”)
- Helpful tips:
 - Do not click the Settings icon
 - Do not click the Settings icon (this is not a typo!)

Profile: Your Personal Settings



- The icon at upper right accesses your profile
- Profile Settings
 - Some profile options are changeable by users
 - Some profile options are not changeable by users
 - Some profile options are changeable by users but should not be changed
- Options that you can feel free to change:
 - In Personal Information just the Name, Phone, and Address
 - Customize My Pages: This allows you to set what tab you see first when you log in
 - Calendar & Reminders: Set how Salesforce should alert you and whether you want individual or digest alerts
- **Do not change anything else.**
- **Do not use the Data Import Wizard.** Contact Salesforce administrators for help importing.

Searching



- Choose any searchable object in the dropdown list next to the search box. The default is "All".
- Enter your search term in the search bar.
- The objects you use most frequently are at the top of the list, followed by the full list of searchable objects in alphabetical order.

Search Results

1. Along the left, objects where search results were found are listed in order by largest number of search results
2. To the right are detailed search results with additional fields for context. Up to 5 results are shown. Click "View More" to see up to 50 results. Use filtered list views and reports to see more than 50 results.

The screenshot shows the ILR School CRM interface. The search bar at the top contains the text "test". The left sidebar shows a navigation menu with "Search Results" highlighted and a red box around the number "1". The main content area is divided into three sections: Reports, Accounts, and Contacts. The Reports section shows a table with 5+ results, sorted by Relevance. The Accounts section shows a table with 5+ results, sorted by Relevance. The Contacts section shows a table with 5+ results, sorted by Relevance. A red box highlights the entry "LR Open Enrollment TEST4" in the Reports table, with the number "2" next to it.

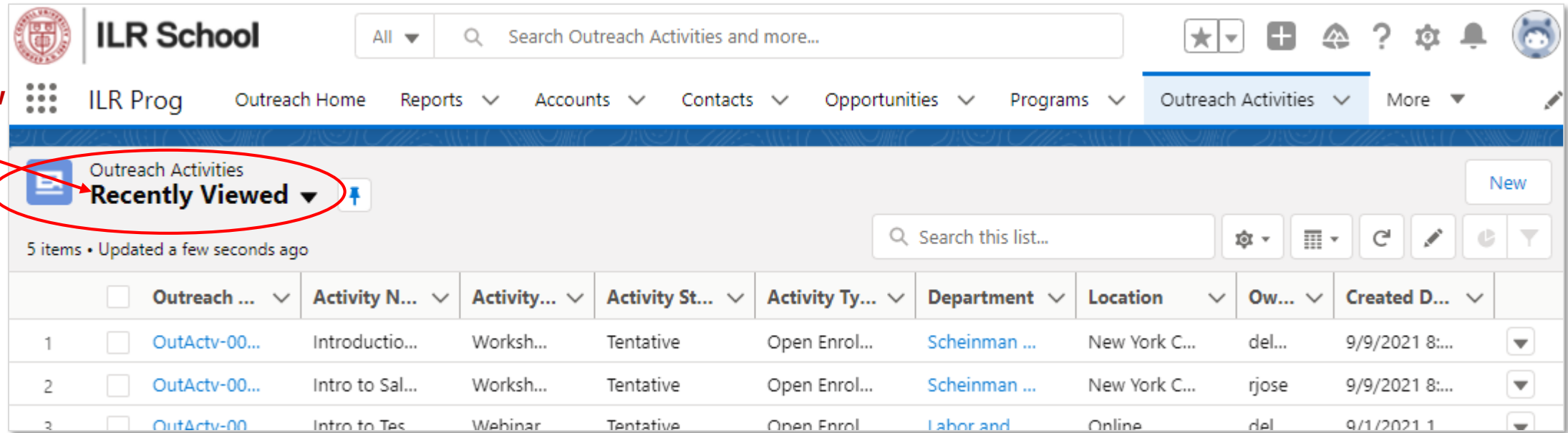
Report Name	Description
Test Leads Count	Test count of Leads
Test Contact Count	Testing count of contacts
TEST OE Partic by FY	Troubleshooting breakover between FYs. Class audience = public, role in (Participant, Auditor, Guest Participant), not cancelled.
Copy of Copy of LR Open Enrollment TEST6	
LR Open Enrollment TEST4	

Account Name	Billing Street	Billing City	Bil...	Billin...	Phone
Test Trek Company	1 Test test blvd	Ithaca	NY	14850	
Lunar Sea Travel TEST	25 Wandering Way	Tranquility	NY	14141	(555) 222-1111
ILR Test SF Account	146 Ives Hall	Ithaca	NY	14583	(607) 255-6957
Test Drupal Company	13 Eaglesrest Rd.	Ithaca	NY	14850	
Test Drupal Company	13 Eaglesrest Rd.	Ithaca	NY	14850	

Name	Account Name	Phone	Email	C...
Samuel Test Test Person	Test Drupal Company	111-111-1100	test1886@testtest.cornell.edu	APIO

Object Pages and Listviews

Listview name



ILR School

All Search Outreach Activities and more...

ILR Prog Outreach Home Reports Accounts Contacts Opportunities Programs Outreach Activities More

Outreach Activities Recently Viewed

5 items • Updated a few seconds ago

Search this list...

	Outreach ...	Activity N...	Activity...	Activity St...	Activity Ty...	Department	Location	Ow...	Created D...	
1	<input type="checkbox"/> OutActv-00...	Introductio...	Worksh...	Tentative	Open Enrol...	Scheinman ...	New York C...	del...	9/9/2021 8:...	▼
2	<input type="checkbox"/> OutActv-00...	Intro to Sal...	Worksh...	Tentative	Open Enrol...	Scheinman ...	New York C...	rjose	9/9/2021 8:...	▼
3	<input type="checkbox"/> OutActv-00	Intro to Tes	Webinar	Tentative	Open Enrol	Labor and	Online	del	9/1/2021 1	▼

- Click on a tab to see a listview with multiple items. The default listview is “Recently Viewed”
- There are multiple listviews that can be filtered and sorted in different ways
- See a menu of all listviews by clicking the listview name. The menu is divided into two sections – recently viewed listviews, and all other listviews
- Use the scroll bar in the menu to move through the list of listviews
- Click the pin icon to the right of a listview name to select it as the default view

List View Controls

The screenshot shows a list view for 'Outreach Activities' under the 'Department - Scheinman Institute'. The interface includes a search bar, a list of columns, and a table of records. Eight red boxes with numbers 1 through 8 point to specific controls: 1 points to the list view dropdown menu, 2 to the pin icon, 3 to the search bar, 4 to the list view controls (clone, rename, etc.), 5 to the layout control (split view), 6 to the edit icon, 7 to the chart icon, and 8 to the filter icon.

	<input type="checkbox"/> Outreach ... ↑	Activity Na...	Form Status	Department	Created By	Activity...	Start Date a...	End Date an...	
1	<input type="checkbox"/>	OutActv-000...	Implementin...	Form Compl...	Scheinman I...	Dan Flswit	Worksh...	9/20/2021 1...	9/21/2021 5...

1. List Views Dropdown Menu – Select a list to view
2. Pin Icon – Designate a list as the default list view for the object
3. List View Search – Find records in a list view
4. List View Controls – Clone and rename lists, add/rearrange columns, and more
5. Layout Control – View your list of records in a split view with the list at left and detail at right
6. Edit Icon – Update fields for records in the list
7. List View Charts – Add a bar or donut chart to visualize your data on the fly
8. Filters – Modify or add filters as needed to slice data

Clone a Listview to Customize It

Outreach Activities
Department - Scheinman Institute

4 items • Sorted by Outreach Activity Name • Filtered by All outreach activities - Department • Updated 11 minutes ago

Search this list...

	Outrea...	Activity ...	Form Stat...	Departme...	Created By	End Date ...
1	<input type="checkbox"/> OutActv-0...	Implemen...	Form Com...	Scheinma...	Dan Elswit	9/21/2021...
2	<input type="checkbox"/> OutActv-0...	Introducti...	Form In Pr...	Scheinma...	Dan Elswit	9/28/2021...
3	<input type="checkbox"/> OutActv-0...	RuthAnn t...	Form In Pr...	Scheinma...	RuthAnn R...	11/23/202...
4	<input type="checkbox"/> OutActv-0...	Intro to Sa...	Form In Pr...	Scheinma...	Rachel Jos...	9/28/2021...

LIST VIEW CONTROLS

- New
- Clone
- Rename
- Sharing Settings
- Edit List Filters

1. Click the Gear icon
2. Choose "Clone"
3. Name your new Listview
4. Click Save
5. You can now add or remove fields and filter the Listview as you wish

Customize a Cloned Listview

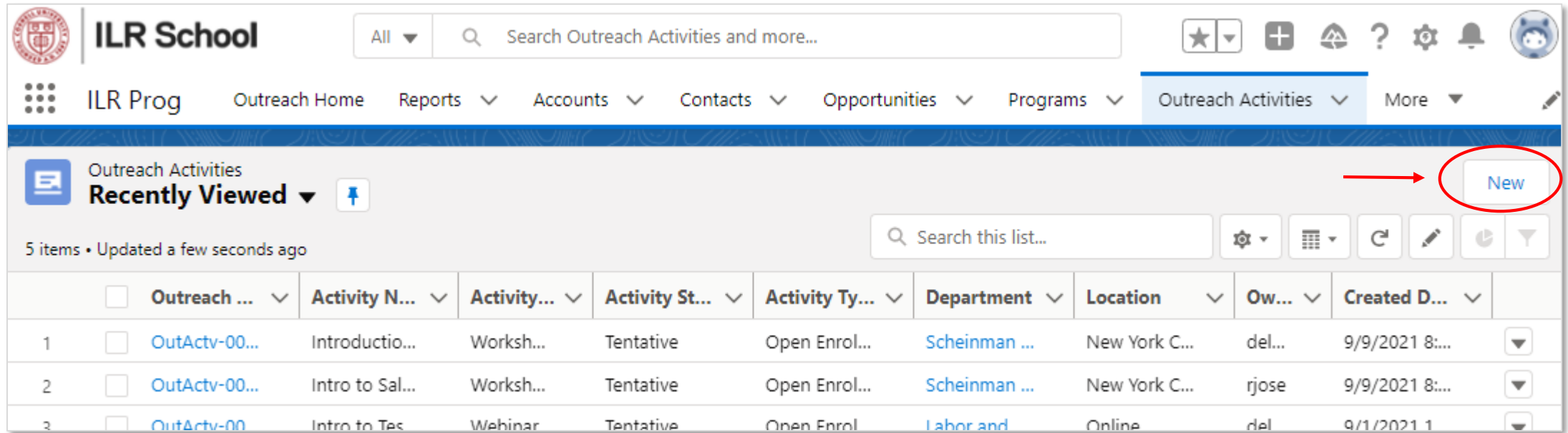
The screenshot shows a Salesforce listview for 'Outreach Activities' in the 'Department - Scheinman Institute'. The list contains 4 items. A context menu is open over the list, showing options like 'New', 'Clone', 'Rename', 'Sharing Settings', 'Edit List Filters', and 'Select Fields to Display'. A red box with the number '1' points to the gear icon in the top right, and another red box with the number '2' points to the 'Select Fields to Display' option in the menu.

	<input type="checkbox"/> Outrea... ↑ ▾	Activity ... ▾	Form Stat... ▾	Departme... ▾	Created By ▾	End Date ... ▾
1	<input type="checkbox"/> OutActv-0...	Implemen...	Form Com...	Scheinma...	Dan Elswit	9/21/2021...
2	<input type="checkbox"/> OutActv-0...	Introducti...	Form In Pr...	Scheinma...	Dan Elswit	9/28/2021...
3	<input type="checkbox"/> OutActv-0...	RuthAnn t...	Form In Pr...	Scheinma...	RuthAnn R...	11/23/202...
4	<input type="checkbox"/> OutActv-0...	Intro to Sa...	Form In Pr...	Scheinma...	Rachel Jos...	9/28/2021...

First, make sure you are viewing your cloned Listview (if necessary, select it by clicking on the drop-down for selecting Listviews above the list)

1. Click the Gear icon
2. Click "Select Fields to Display"
3. Select desired fields from the scrolling list on the left and move them to or from the Listview by clicking the arrow icons between the scrolling lists.
4. There is a limit of 15 fields in a Listview

Add New Data



The screenshot shows the ILR School Outreach Activities dashboard. At the top, there is a navigation bar with the ILR School logo, a search bar, and various utility icons. Below the navigation bar, there is a main header with the text 'Outreach Activities' and a 'Recently Viewed' section. A red arrow points to a 'New' button located in the top right corner of the main content area. Below the 'New' button, there is a search bar and a table of Outreach Activities. The table has columns for 'Outreach ...', 'Activity N...', 'Activity...', 'Activity St...', 'Activity Ty...', 'Department', 'Location', 'Ow...', and 'Created D...'. The table contains three rows of data.

	Outreach ...	Activity N...	Activity...	Activity St...	Activity Ty...	Department	Location	Ow...	Created D...
1	<input type="checkbox"/> OutActv-00...	Introductio...	Worksh...	Tentative	Open Enrol...	Scheinman ...	New York C...	del...	9/9/2021 8:...
2	<input type="checkbox"/> OutActv-00...	Intro to Sal...	Worksh...	Tentative	Open Enrol...	Scheinman ...	New York C...	rjose	9/9/2021 8:...
3	<input type="checkbox"/> OutActv-00	Intro to Tes	Webinar	Tentative	Open Enrol	Labor and	Online	del	9/1/2021 1

- Click the “New” button to add new data
- This is how you will create and fill out a new Outreach Activities form
- We will explore this more in the next training, specifically about the form

Item Detail View

Outreach Activity
OutActv-000007

Program Overview

Department: Scheinman Institute on Conflict Resolution

Activity Name: Implementing and Sustaining A Successful Diversity and Inclusion Strategy

Activity Description:

Activity Type: Open Enrollment

Existing Course Number if Applicable:

Activity Format: Workshop

Capacity (maximum number of registrants): 20

Minimum number of registrants: 10

Delivery Method: Online Synchronous (live online)

Registration System: ILR Web Site

Activities Sessions (6)

6 items • Updated a few seconds ago

	Activities Sessio...	Start	End
1	ASID-0000001	9/20/2021 10:00 AM	9/20/2021 1:00 PM
2	ASID-0000002	9/20/2021 10:00 AM	9/20/2021 1:00 PM
3	ASID-0000003	9/21/2021 10:00 AM	9/21/2021 1:00 PM
4	ASID-0000007	9/21/2021 2:00 PM	9/21/2021 5:00 PM
5	ASID-0000005	9/22/2021 2:00 PM	9/22/2021 5:00 PM
6	ASID-0000013	10/6/2021 10:00 AM	10/6/2021 1:00 PM

[View All](#)

Help for the Outreach Intake Form

To edit fields click the pencil icon next to the desired field.

To request to cancel or reschedule an activity set the status on the status bar to "Cancelled".

Scheduling and Support
Some questions relate to requesting assistance from support entities such as the Conference Center, Marketing, Fiscal, or Learning Innovations. If those boxes are checked, requests will be sent to those teams.

1. Top bar contains buttons for common actions. Your role determines which buttons are available
2. Left side shows fields related to the item, in this case an Activities form
3. Click the pencil icon to edit any field
4. Related tables are shown at right, in this case, sessions related to this form
5. Depending on the nature of the situation, other data may appear at right as well

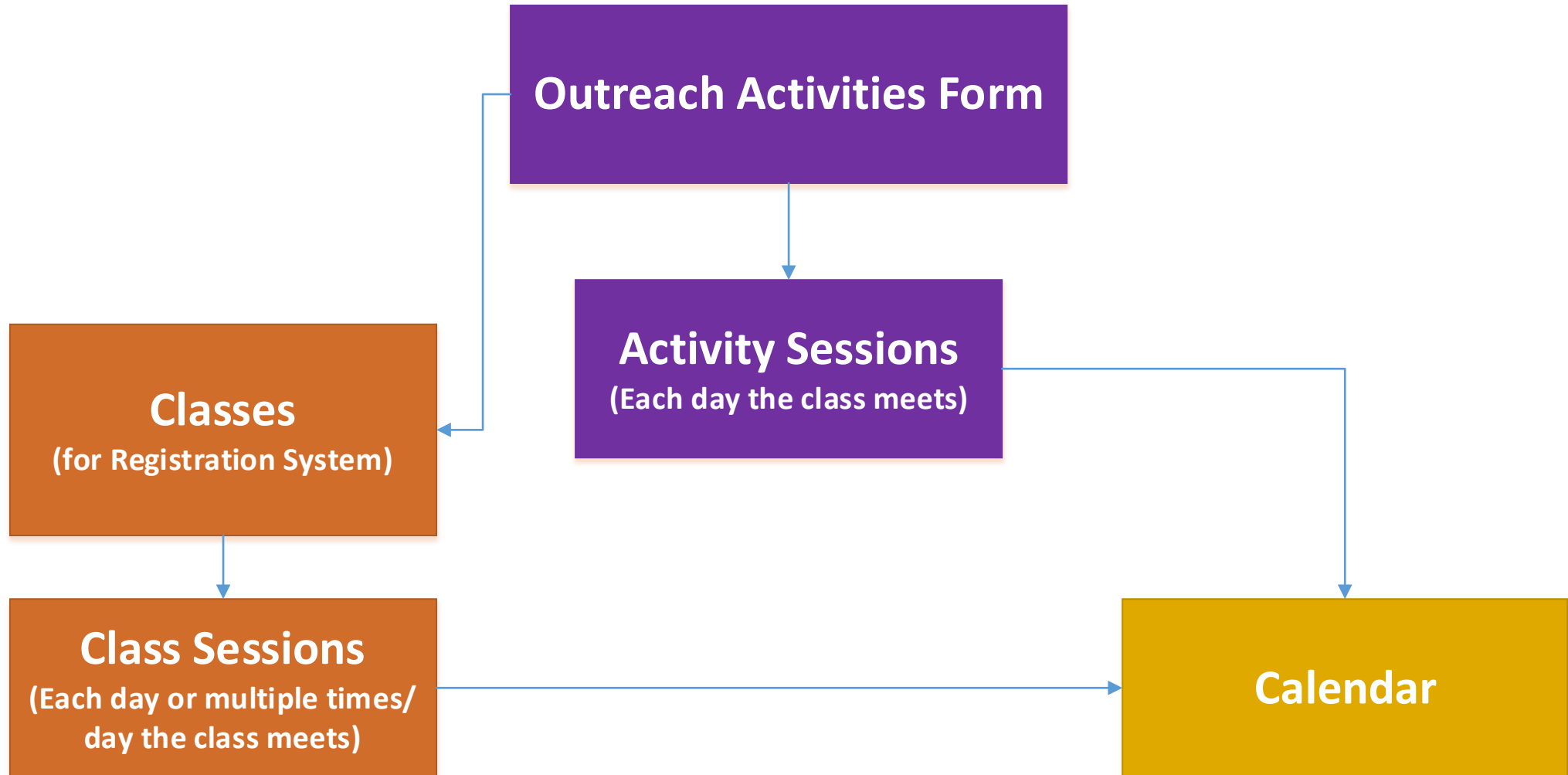
Report and Dashboard Generator

- Reports allow a variety of data to be displayed together, including related lists, so for example, Opportunities with their related Contacts can be viewed and grouped together.
- Filtering on all fields
- Combined joined and summary reports
- Row and column grouping
- In-line formulas
- Integration with dashboards
- For those interested, another training...

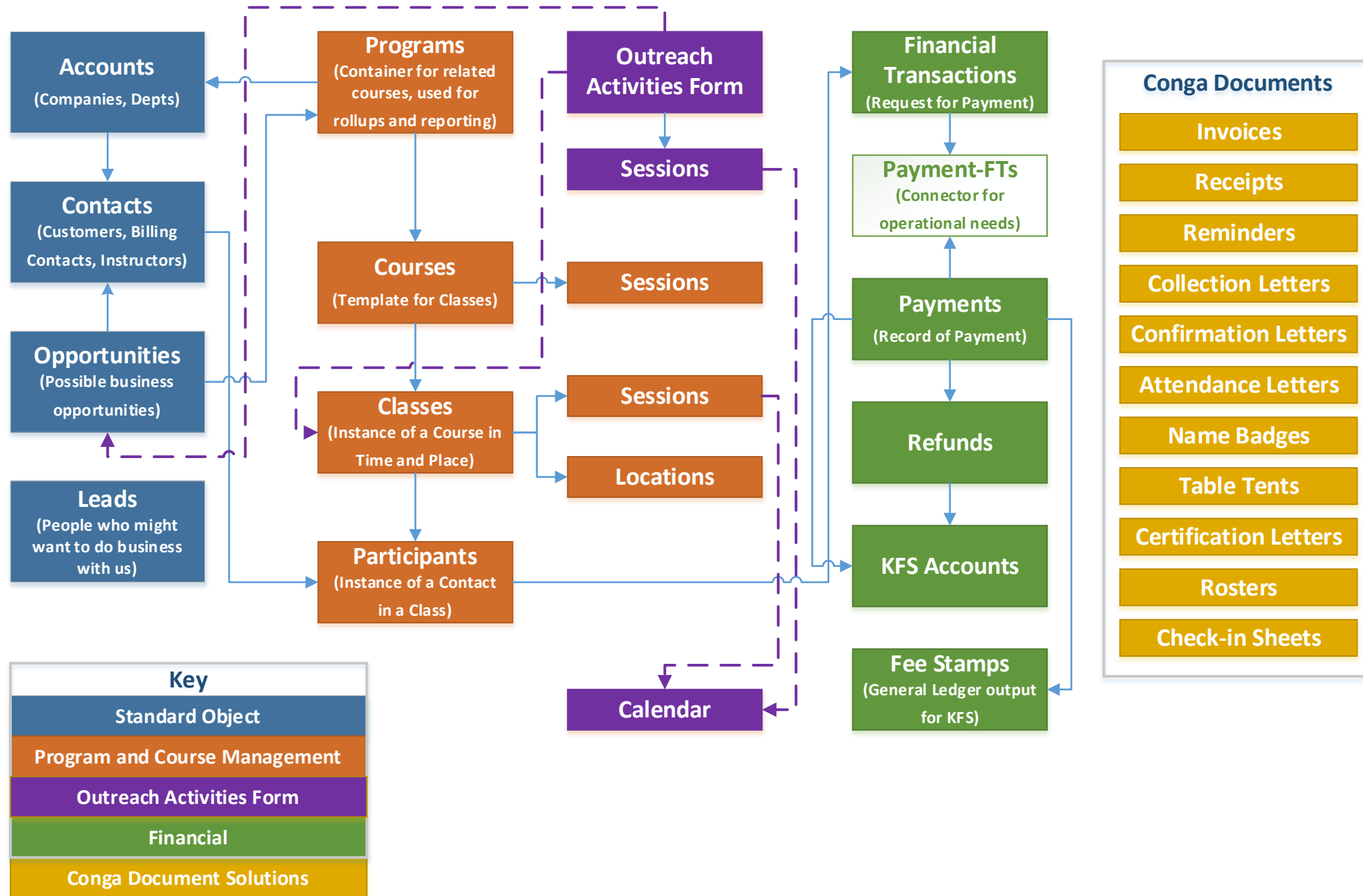
Questions and Further Training

- Salesforce is not so much *complicated* as it is *comprehensive* – there is a lot to take in.
- Please ask questions, now or in the future!
- We also want your feedback.
- This system will continue to be developed and improved and new functionality will be added. Your input is crucial for success.
- If you have a technical issue such as not being able to log in, send email to ilr-admapp-reqs@cornell.edu
- All other comments, questions, requests, suggestions, and ideas should be submitted to ILRActivityFormHelp@cornell.edu

ILR Outreach Activities Overview



ILR Outreach Salesforce Schema Overview





Support Team-Specific Section

Overview of the Form

- Quick walk-through
- Field list
- New features since last we talked:
 - Session creation automation
 - Notes section

Field List

Comprehensive list of all fields on the form and session tables (regardless of visibility based on conditions)

- Name as referred to in views and reports
- Help text for each field
- All picklist values
- Type of data (text, picklist, etc.)
- Whether it's a single or multi-select picklist
- Whether It's a calculation based on other data elsewhere in the system

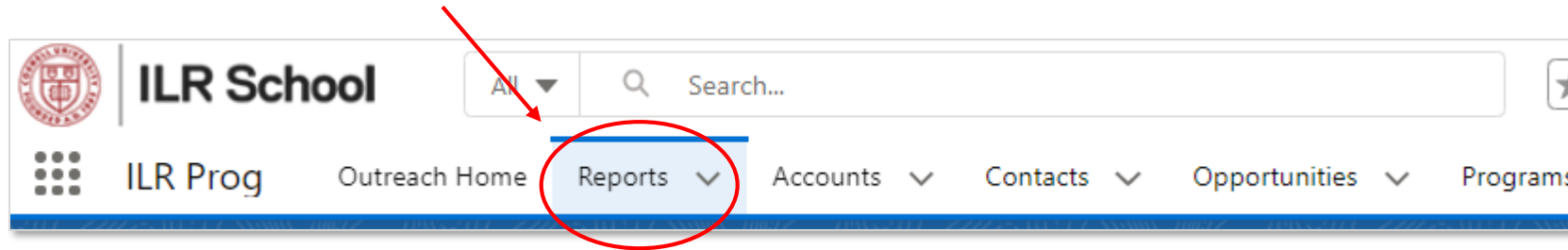


ListViews vs Reports

	ListView	Report
Number of Fields	15	255
Number of Tables	1	4
Grouping	No	Yes
Temporary formulas	No	Yes
Summary view	No	Yes
Export to Excel	No	Yes
Can run on a schedule	No	Yes
Quick and easy	Yes	No
In-Line editing	Yes	No

Navigating the Report Folders

- Click the Reports tab on the Nav bar at the top of the screen



- Depending on your role you will see different folders listed

Reports

All Folders

9 items

Search all folders...

New Report

New Report (Salesforce Cl...

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Conga Reports	Diabsolut Admin	5/10/2017, 8:52 AM	Diabsolut Admin	5/10/2017, 8:52 AM
Created by Me	ExecEd - Reports	Diabsolut Admin	10/27/2017, 9:27 PM	Diabsolut Admin	10/27/2017, 9:27 PM
Private Reports	ILR Extension Reports	Donna Sharp	3/30/2015, 2:56 PM	Diabsolut Admin	10/27/2017, 9:27 PM
Public Reports	ILR Finance Reports	Donna Sharp	4/27/2012, 11:34 AM	Diabsolut Admin	10/27/2017, 9:27 PM
All Reports	ILR Learning Innovation	Dan Elswit	9/1/2021, 12:26 PM	Dan Elswit	9/1/2021, 12:26 PM
	ILR Marketing	Dan Elswit	12/5/2018, 8:33 AM	Dan Elswit	12/13/2018, 1:57 PM
	NYC Classroom Support	Dan Elswit	9/20/2021, 7:43 PM	Dan Elswit	9/20/2021, 7:43 PM

Finding Reports

- Several ways to find reports are listed at the left
- Focus on the second section: Folders
- Click “All Folders” to see all folders available to you
- Click on an individual folder to see reports found there
- Click on a report to run it
- The Search mechanism filters based on what set of folders or reports is selected in the left column
- For example, to search across all reports:
 1. Click “All Reports” in the left column
 2. Enter the name of your report in the Search bar

Running Reports

The screenshot shows a report titled "Outreach Activities by Department" with a subtitle "Report: Outreach Activities with Department". The interface includes a search bar, an "Add Chart" button, a filter dropdown, a refresh button, an "Edit" button, and a menu icon. Below the header, it displays "Total Records: 6". The main content is a table with columns for Department, Activity Name, Form Status, Location, Start Date and Time, and End Date and Time. The table lists three activities: "Intro to Testing Stuff 1", "Implementing and Sustaining A Successful Diversity and Inclusion Strategy", and "Introduction to Salesforce".

Department: Account Name ↑	Activity Name ↑	Form Status	Location	Start Date and Time	End Date and Time
<input type="checkbox"/> Labor and Employment Law (1)	Intro to Testing Stuff 1	Form In Progress	Online	9/10/2021 9:00 AM	9/15/2021 2:00 PM
<input type="checkbox"/> Scheinman Institute on Conflict Resolution (4)	Implementing and Sustaining A Successful Diversity and Inclusion Strategy	Form Complete	Online	9/20/2021 10:00 AM	9/21/2021 5:00 PM
	Introduction to Salesforce	Form In Progress	New York City IL...	9/24/2021 9:00 AM	9/28/2021 4:00 PM

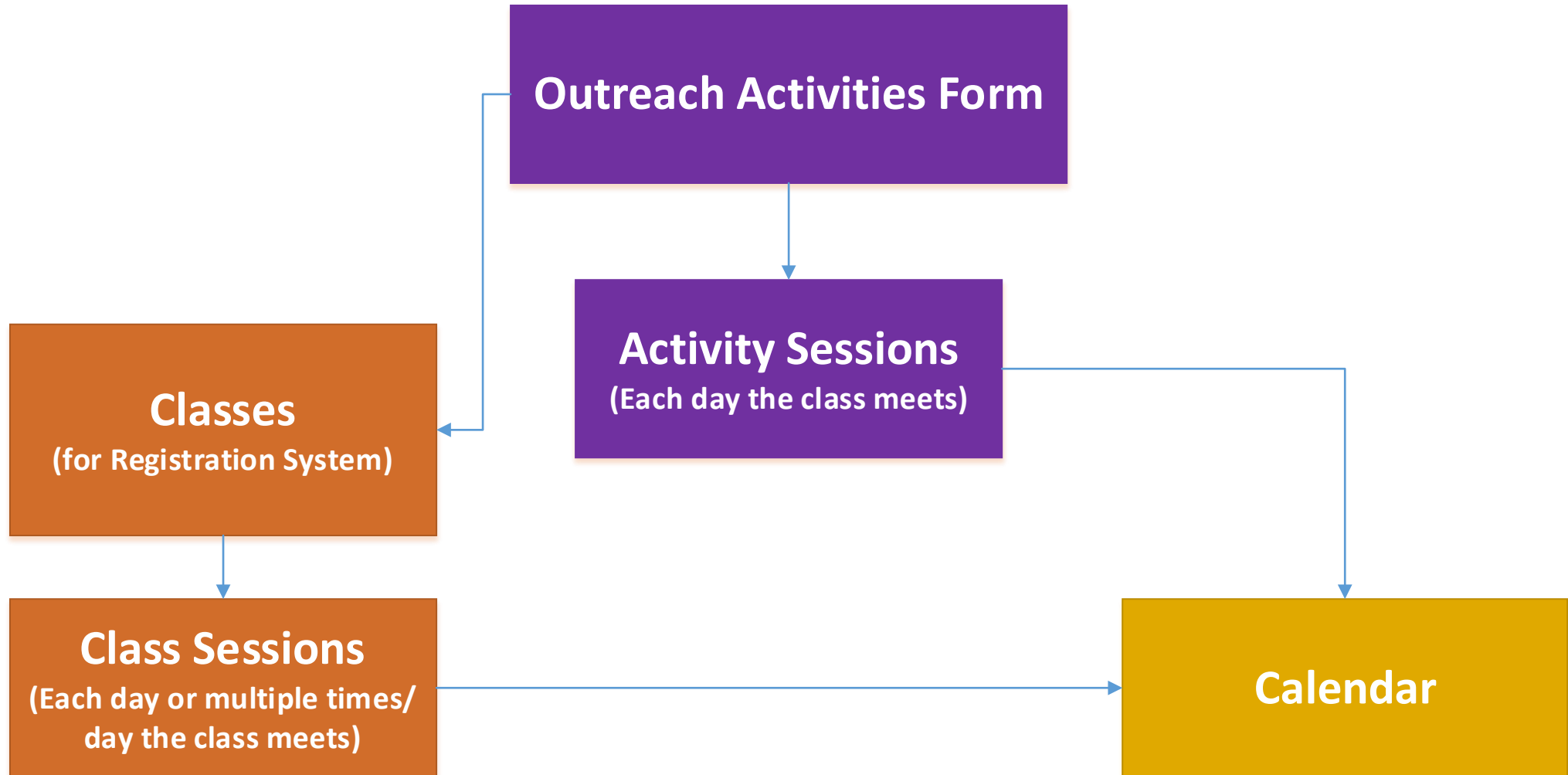
1. Title
2. Search within the displayed report
3. Add a chart to the report
4. Filter the report
5. Refresh the report
6. Edit the report (if you have access)
7. Other options including Save As, Subscribe, and Export

Preparing to Create a Report

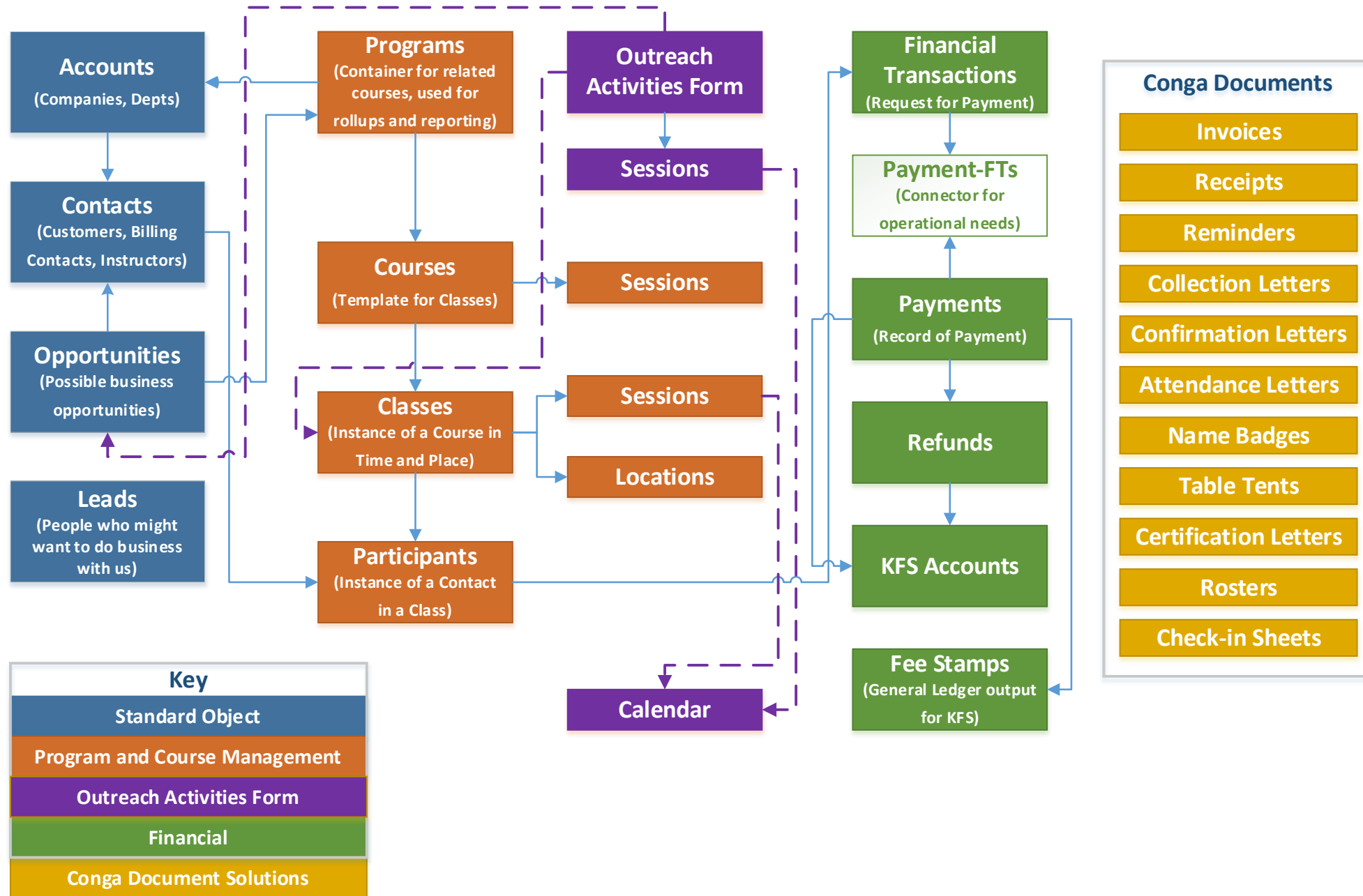
- Have at least an idea of what you want to see in the report
- Identify the fields you want to see
- Field names are the same as they appear in the Outreach form
- Remember that a form can have multiple “child” sessions
- Remember that a session can only have one “parent” form
- Have your field list handy



ILR Outreach Activities Overview

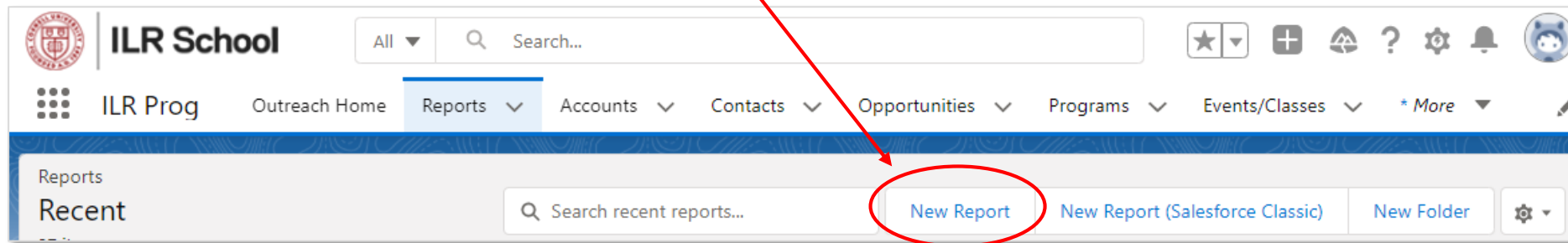


ILR Outreach Salesforce Schema Overview



Creating Reports

- Click the Reports tab
- Click the "New Report" button near the top of the screen

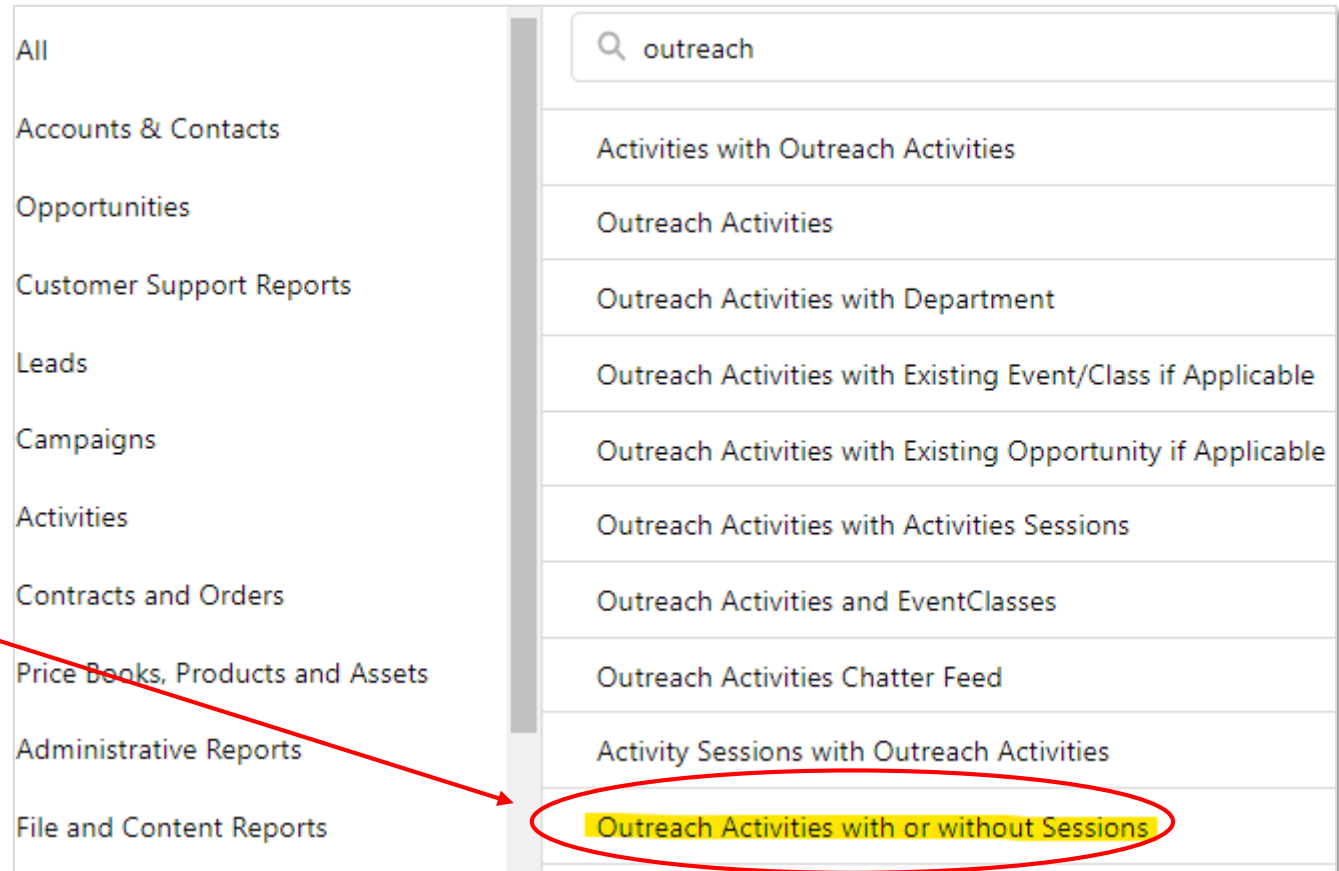


Report Types

- Report types are created by system administrators
- Report types define relationships between related tables of data
- There are 6 related tables and 10 potential report types related to the Activity form, but you will be concerned with only 2 related tables and 1 report type
- The two related tables are:
 - The Activity Form itself
 - The Activity Sessions

Choose a Report Type

- On the Report Type screen, type "outreach" in the search bar at the top to filter
- Most commonly, you'll choose **"Outreach Activities with or without Sessions"**.
- If in doubt, choose that.



The screenshot shows a report selection interface. On the left is a sidebar with categories: All, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets, Administrative Reports, and File and Content Reports. On the right is a search bar containing the text "outreach". Below the search bar is a list of report types. The report type "Outreach Activities with or without Sessions" is highlighted in yellow and circled in red. A red arrow points from the text in the list group to this highlighted report type.

Search Term	Report Type
outreach	Activities with Outreach Activities
outreach	Outreach Activities
outreach	Outreach Activities with Department
outreach	Outreach Activities with Existing Event/Class if Applicable
outreach	Outreach Activities with Existing Opportunity if Applicable
outreach	Outreach Activities with Activities Sessions
outreach	Outreach Activities and EventClasses
outreach	Outreach Activities Chatter Feed
outreach	Activity Sessions with Outreach Activities
outreach	Outreach Activities with or without Sessions

Report Builder

The screenshot shows the Report Builder interface for a report titled "Outreach Activities with or without Sessions". The interface includes a top navigation bar with buttons for "Got Feedback?", "Add Chart", "Save & Run", "Save", "Close", and "Run". Below this is a "Fields" sidebar on the left with sections for "Outline", "Filters", "Groups", and "Columns". The main area displays a table of report data with columns for "Outreach Activity Name" and "Activities Session ID".

Numbered callouts in the image:

- 1: Points to the "Add column..." input field in the Columns section of the Fields sidebar.
- 2: Points to the "Add group..." input field in the Groups section of the Fields sidebar.
- 3: Points to the main report table area.
- 4: Points to the "Filters" section in the Fields sidebar.
- 5: Points to the "Save & Run" and "Save" buttons in the top navigation bar.

	Outreach Activity Name	Activities Session ID
1	OutActv-000007	ASID-0000014
2	OutActv-000007	ASID-0000013
3	OutActv-000007	ASID-0000007
4	OutActv-000007	ASID-0000005
5	OutActv-000007	ASID-0000006
6	OutActv-000007	ASID-0000004
7	OutActv-000010	ASID-0000049
8	OutActv-000010	ASID-0000048

1. Add fields here, click in the blank and being typing the name of the desired field
2. Group by fields here
3. Your report will appear here as you add fields
4. Filter your report by clicking here
5. Save or save and run by clicking here

Building the Report

REPORT ▼
New Report ✎ Outreach Activities with or without Sessions

Got Feedback? ↶ ↷ Add Chart Save & Run Save ▼

Outline Filters 2

Previewing a limited number of records. Run the report to see everything. Update Preview

	Outreach Activity Name	Activities Session ID	Activity Name
1	OutActv-000007	ASID-0000014	Implementing and Sustaining A Successful Diversity and Inclusion Stra
2	OutActv-000007	ASID-0000013	Implementing and Sustaining A Successful Diversity and Inclusion Stra
3	OutActv-000007	ASID-0000007	Implementing and Sustaining A Successful Diversity and Inclusion Stra
4	OutActv-000007	ASID-0000005	Implementing and Sustaining A Successful Diversity and Inclusion Stra
5	OutActv-000007	ASID-0000006	Implementing and Sustaining A Successful Diversity and Inclusion Stra
6	OutActv-000007	ASID-0000004	Implementing and Sustaining A Successful Diversity and Inclusion Stra
7	OutActv-000010	ASID-0000049	Introduction to Salesforce
8	OutActv-000010	ASID-0000048	Introduction to Salesforce
9	OutActv-000010	ASID-0000047	Introduction to Salesforce
10	OutActv-000008	ASID-0000009	Dan's Worker Institute Test Activity
11	OutActv-000008	ASID-0000009	Dan's Worker Institute Test Activity

Columns

Add column... 🔍

- Outreach Activity Name ✕
- Activities Session ID ✕
- Activity Name ✕
- Activity Status ✕

1. Outreach Activity Name and Activities Session ID are “live” links in the final report that, when clicked, take you to those records
2. Add fields as columns and they appear in real-time to the right
3. The data in the builder is just a sample and does not include all data. To see all data, run the report

Grouping by Fields

Previewing a limited number of records. Run the report to see everything. Update Preview Automat

Location ↑	Outreach Activity Name	Activities Session ID	Activity Name
New York City ILR Conference Center (5)	OutActv-000010	ASID-0000049	Introduction to Salesforce
	OutActv-000010	ASID-0000048	Introduction to Salesforce
	OutActv-000010	ASID-0000047	Introduction to Salesforce
	OutActv-000008	ASID-0000009	Dan's Worker Institute Test Activity
	OutActv-000008	ASID-0000008	Dan's Worker Institute Test Activity
Subtotal			
Online (7)	OutActv-000007	ASID-0000014	Implementing and Sustaining A Successfu
	OutActv-000007	ASID-0000013	Implementing and Sustaining A Successfu
	OutActv-000007	ASID-0000007	Implementing and Sustaining A Successfu
	OutActv-000007	ASID-0000005	Implementing and Sustaining A Successfu
	OutActv-000007	ASID-0000006	Implementing and Sustaining A Successfu

Row Counts Detail Rows Subtotals Grand Total

1. Group by any field by selecting it in the "Group Rows" blank. For now, ignore "Group Columns"
2. If Subtotal and Total rows are unnecessary, remove them with the buttons at the bottom of the screen

Filtering Reports

Outline Filters 2

Previewing a limited number of records. Run the report to see everything. Update Preview A

Location ↑	Outreach Activity Name	Activities Session ID	Activity Name
New York City ILR Conference Center (5)	OutActv-000010	ASID-0000049	Introduction to Salesfo
	OutActv-000010	ASID-0000048	Introduction to Salesfo
	OutActv-000010	ASID-0000047	Introduction to Salesfo
	OutActv-000008	ASID-0000009	Dan's Worker Institute
	OutActv-000008	ASID-0000008	Dan's Worker Institute
Subtotal			
Online (7)	OutActv-000007	ASID-0000014	Implementing and Sust
	OutActv-000007	ASID-0000013	Implementing and Sust

Filters

Add filter...

Show Me My outreach activities

Created Date Current FQ (Jul 1, 2021 - Sep 30, 2021)

Major “gotcha”! By default all reports are filtered for items you own but odds are you don't own any activities!

1. Change the “Show Me” filter to “All Activities”
2. Select the desired Created Date (or Start Date) range
3. Add other filters as desired using the Add filter blank

Filtering Tips

1. For text fields, if there is any ambiguity, use "Contains" rather than "Equals"
2. Date ranges work as expected (Equal or greater than 9/1/2021 and less than or equal to 9/30/2021 yields all of September of 2021)
3. Use Ctrl-Click to select multiple picklist values

Saving and Running a Report

The screenshot shows a report builder interface. At the top, there is a navigation bar with a 'REPORT' dropdown, a 'New Report' button, and a report title 'Outreach Activities with or without Sessions'. To the right of the title are buttons for 'Got Feedback?', a refresh icon, an 'Add Chart' button, a 'Save & Run' button (callout 1), a 'Save' button with a dropdown arrow (callout 2), a 'Close' button, and a 'Run' button (callout 3). Below the navigation bar, there is a sidebar on the left with 'Outline' and 'Filters' sections. The main area displays a table of report data with columns for Location, Outreach Activity Name, Activities Session ID, and Activity Name. A status message at the top of the table reads 'Previewing a limited number of records. Run the report to see everything.' and there is a toggle for 'Update Preview Automatically'.

Location ↑	Outreach Activity Name	Activities Session ID	Activity Name
New York City ILR Conference Center (5)	OutActv-000010	ASID-0000049	Introduction to Salesforce
	OutActv-000010	ASID-0000048	Introduction to Salesforce
	OutActv-000010	ASID-0000047	Introduction to Salesforce
	OutActv-000008	ASID-0000009	Dan's Worker Institute Test Activity
	OutActv-000008	ASID-0000008	Dan's Worker Institute Test Activity
Online (7)	OutActv-000007	ASID-0000014	Implementing and Sustaining A Successful Div
	OutActv-000007	ASID-0000013	Implementing and Sustaining A Successful Div

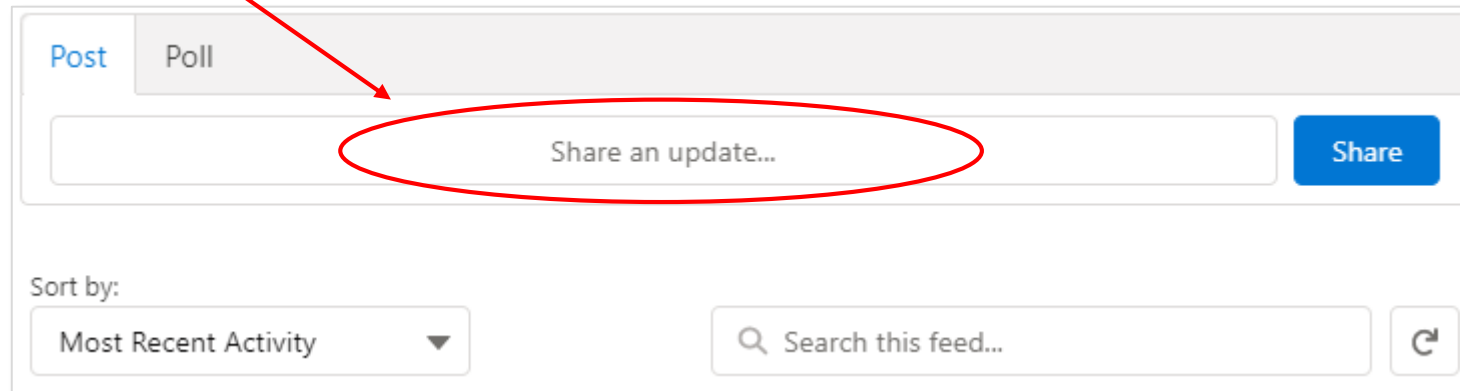
1. Save the report and then immediately exit the Builder and run it
2. Save the report but do not exit the Builder
3. Run the report but do not save it (**Caution!** If you do not Edit the report and come back into the Builder and save it you will lose it)

Chatter

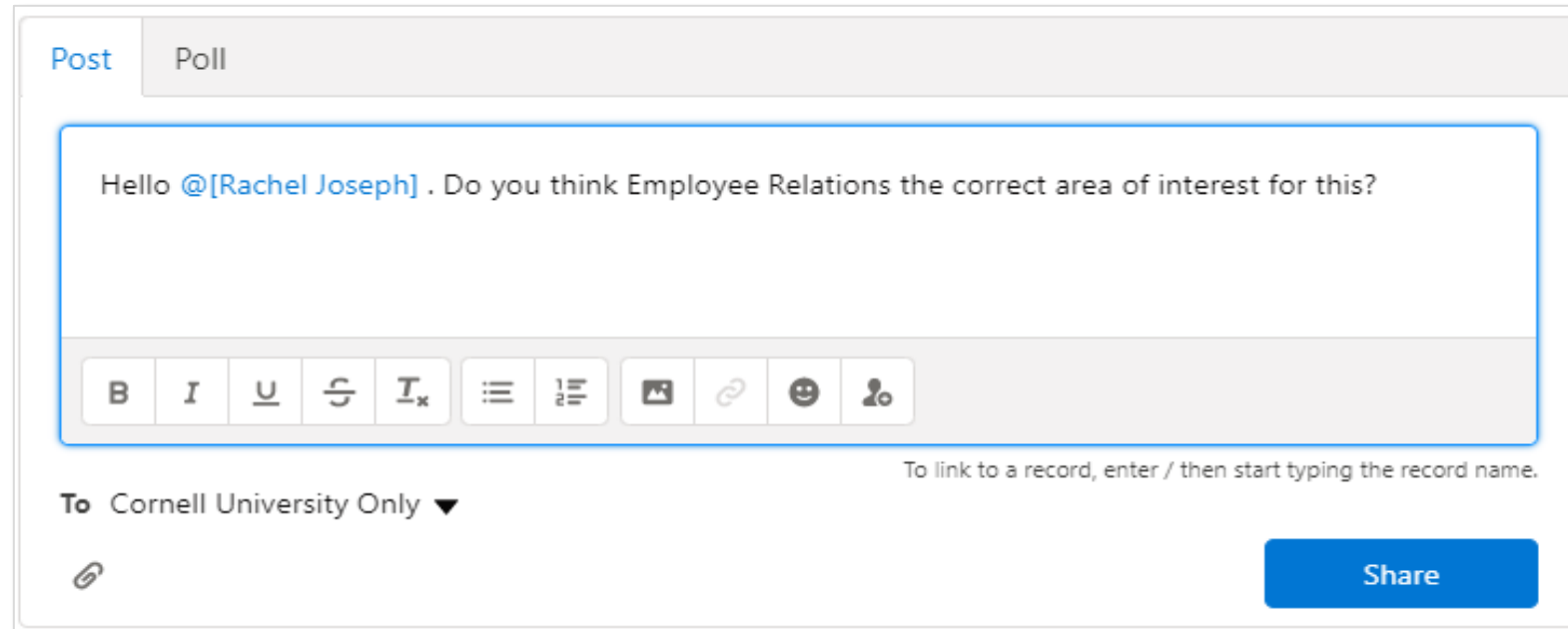
- Chatter is a Chat mechanism built into Salesforce
- Allows conversations between Salesforce users
- Two types of conversations
 - Updates – used to announce changes made to the record (form)
 - Comments – for more general conversation with other people
- Two ways to use Chatter
 - Inside Salesforce – valuable if you are already viewing the record you want to talk about
 - From email – once a conversation has started that you are included in, you can simply reply to emails in Outlook and they will be recorded in the Chatter feed in Salesforce automatically

Chatter Threads

To start a new thread, click the Update box at the top of the Chatter box



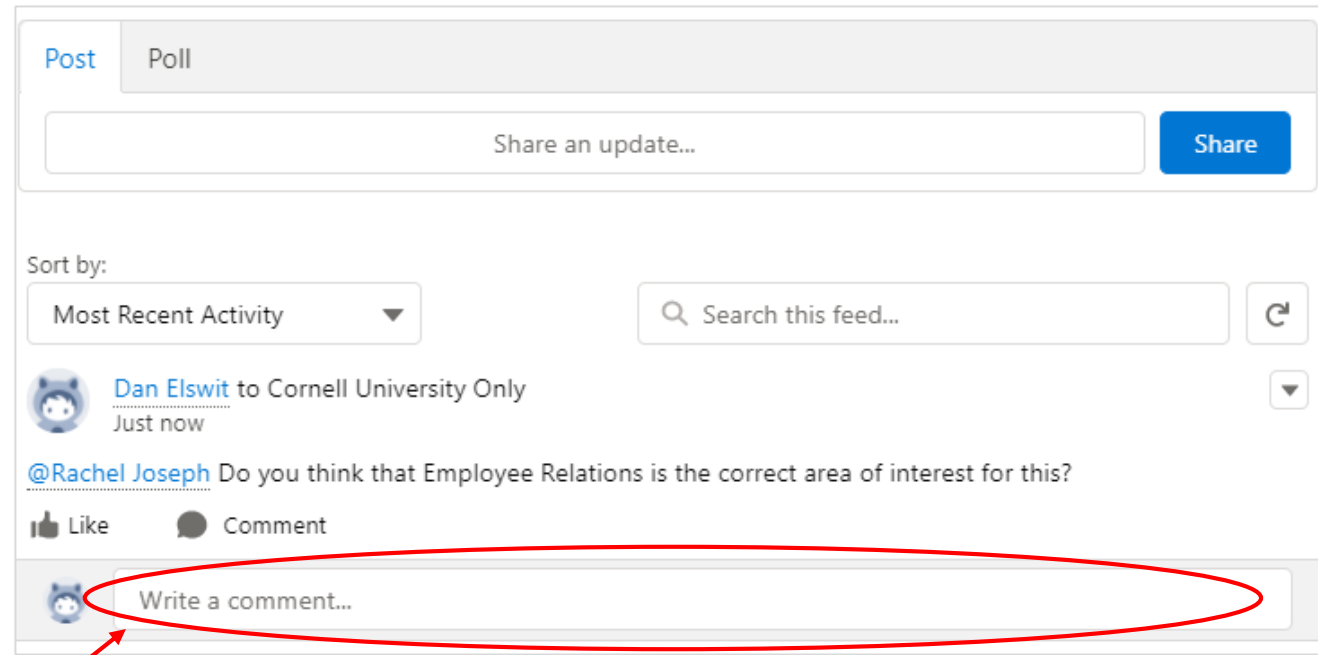
Chatter Threads



The screenshot shows a Chatter thread creation interface. At the top, there are two tabs: "Post" (selected) and "Poll". Below the tabs is a text input field containing the message: "Hello @[Rachel Joseph] . Do you think Employee Relations the correct area of interest for this?". Below the text field is a rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Text Color (I_x), List (bulleted), Numbered List (1-2-3), Attachments (image, link), Emojis (smiley face), and Mentions (person icon). Below the toolbar, the recipient is set to "To Cornell University Only" with a dropdown arrow. A small link icon is visible on the left, and a blue "Share" button is on the right. A small text note at the bottom right says "To link to a record, enter / then start typing the record name."

- Conversations are organized into threads
- Bring someone into a thread with the "@" sign
- Type "@" and start typing their name, then select the name to include them in the thread, and finish your message
- Once a thread starts, replies will notify everyone who was mentioned

Chatter Threads



- To comment on an existing thread, find the thread and use the associated comment box under that thread. Be sure to pick the correct comment box for the thread you want to comment on
- Once there are more than 3 comments in a thread, earlier ones are hidden, but can be displayed by clicking the "more comments" link in the desired thread

Chatter Threads

The screenshot displays a Chatter interface with a 'Post' tab selected. At the top, there is a text input field labeled 'Share an update...' and a blue 'Share' button. Below this, the 'Sort by:' dropdown is set to 'Most Recent Activity'. A search bar labeled 'Search this feed...' is also visible. The main content shows a post by 'Dan Elswit to Cornell University Only' from '3m ago'. The post text is '@Rachel Joseph Do you think that Employee Relations is the correct area of interest for this?'. Below the post are 'Like' and 'Comment' buttons. A comment by the same user is shown in a text area, with the text 'You could use that or perhaps Employment Law.' circled in red. The comment area includes a rich text editor with icons for bold, italic, underline, strikethrough, bulleted list, numbered list, insert image, link, emoji, and user mention. At the bottom right of the comment area is a blue 'Comment' button. A small note at the bottom right of the comment area reads 'To link to a record, enter / then start typing the record name.'

Post Poll

Share an update... Share

Sort by:
Most Recent Activity

Search this feed...

[Dan Elswit](#) to Cornell University Only
3m ago

[@Rachel Joseph](#) Do you think that Employee Relations is the correct area of interest for this?

Like Comment

You could use that or perhaps Employment Law.

B *I* U ~~T~~

-

-

To link to a record, enter / then start typing the record name.

Comment

Chatter Threads

The screenshot displays a Chatter interface with a post and a comment. At the top, there are tabs for "Post" and "Poll". Below the tabs is a text input field with the placeholder "Share an update..." and a blue "Share" button. Underneath is a "Sort by:" dropdown menu set to "Most Recent Activity", a search bar with the placeholder "Search this feed...", and a refresh icon. The main content area shows a post by "Dan Elswit" to "Cornell University Only" from "5m ago". The post text is "@Rachel Joseph Do you think that Employee Relations is the correct area of interest for this?". Below the post are "Like" and "Comment" buttons, and a summary of "1 comment · 1 view". A comment by "Rachel Joseph" from "a few seconds ago" is highlighted with a red oval; the comment text is "You could use that or perhaps Employment Law." and it has a "Like" button. At the bottom, there is a "Write a comment..." input field.

Post Poll

Share an update... Share

Sort by:
Most Recent Activity

Search this feed...

[Dan Elswit](#) to Cornell University Only
5m ago

[@Rachel Joseph](#) Do you think that Employee Relations is the correct area of interest for this?

Like Comment 1 comment · 1 view

[Rachel Joseph](#)
a few seconds ago
You could use that or perhaps Employment Law.
Like

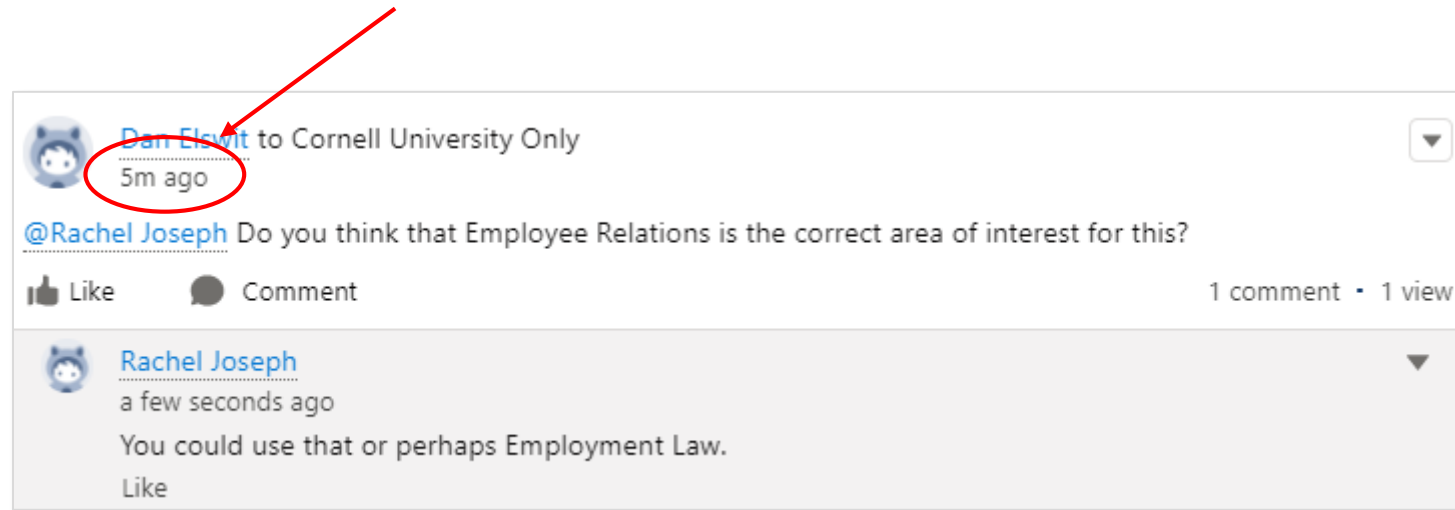
Write a comment...

Too Many Email Notifications!

- If you are getting too many email notifications from Chatter, you have two options:
 - Mute the offending thread(s)
 - Go into your personal profile and set up digest notifications (which will send batch notifications on a schedule)

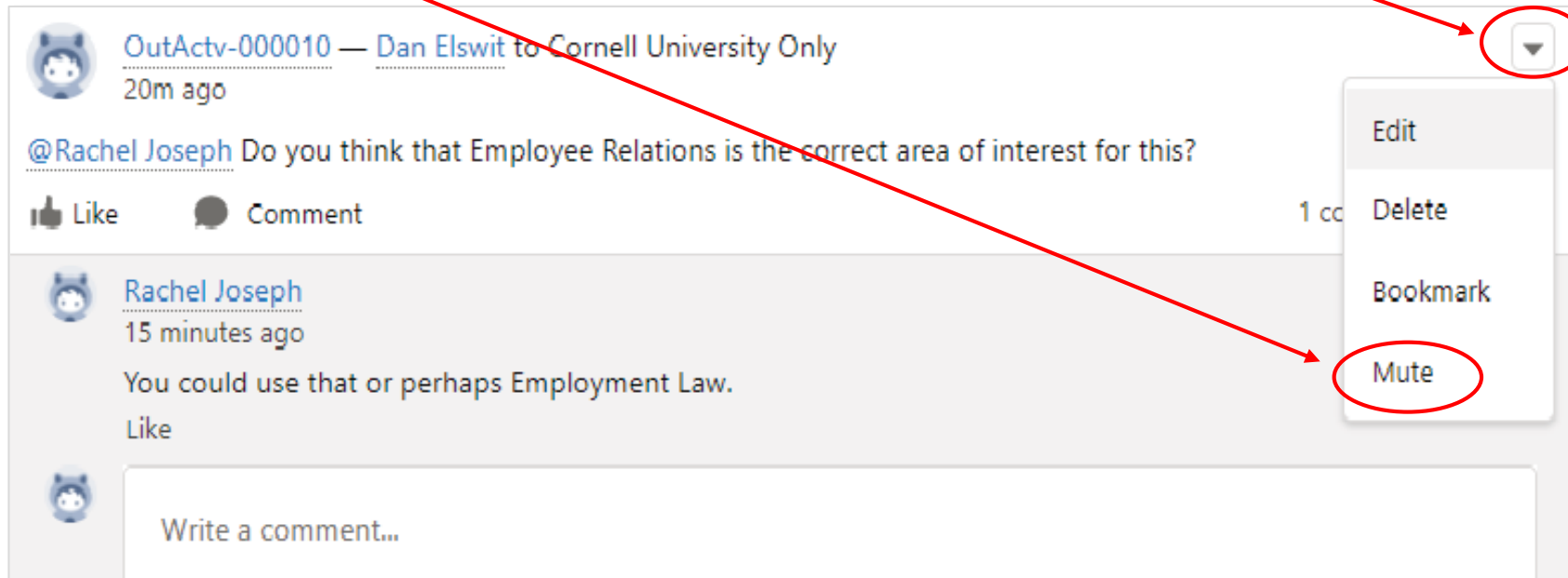
Mute a Chatter Thread (slide 1)

- Go to the top of thread
- Click the date (or if very recent, where it says so-many-minutes-ago, for instance "5m ago")



Mute a Chatter Thread (slide 2)

- Click the down-arrow to the right
- Choose "Mute"



Chatter

- There is a lot of facets to Chatter
- We will be initially using it very simply
- However, to explore more and see an overall view of all your Chatter conversations at once, click the Chatter tab in the Nav Bar
- An additional training will be provided in the future to delve more into Chatter