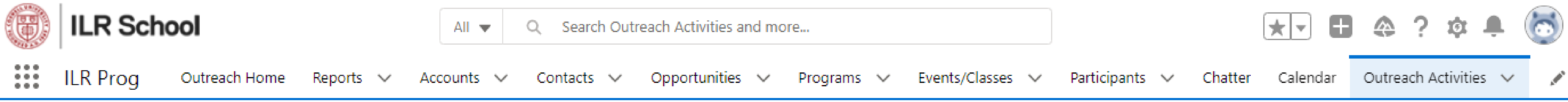


Getting Started in Salesforce

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:

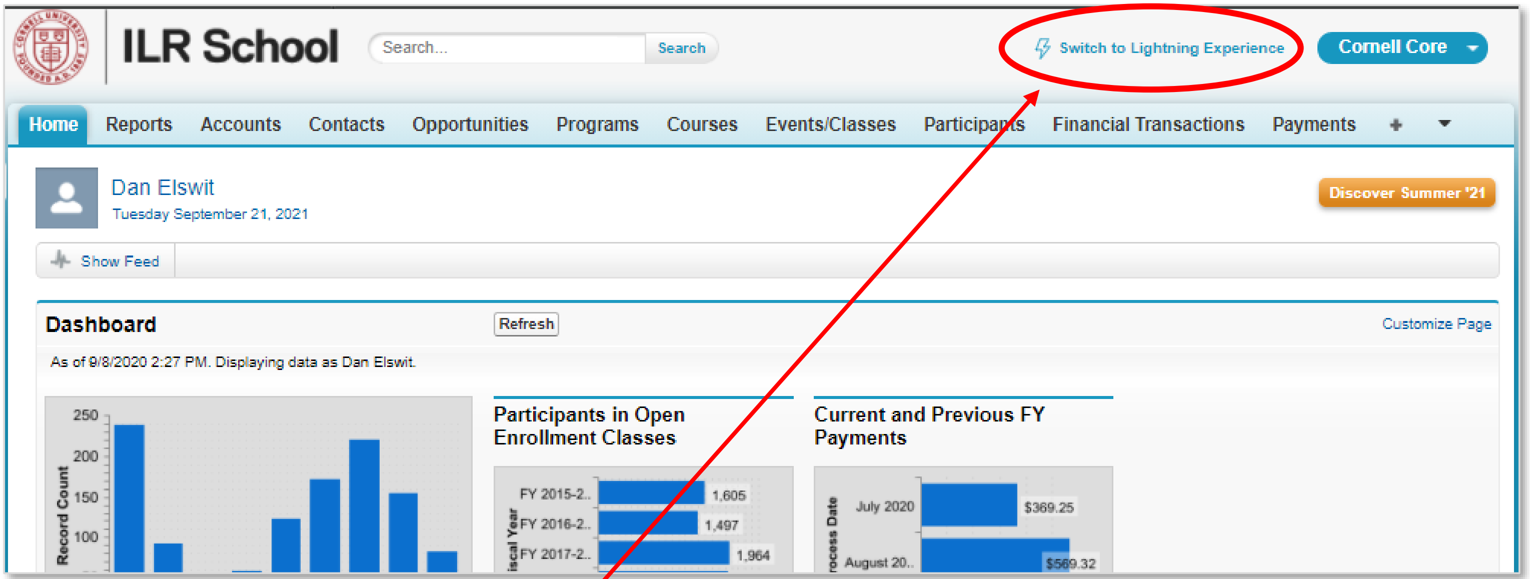
3. Log in as usual to the Cornell CUWebLogin page
4. In a moment you will be brought to the landing page that has been assigned to you based on your role in Salesforce.

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

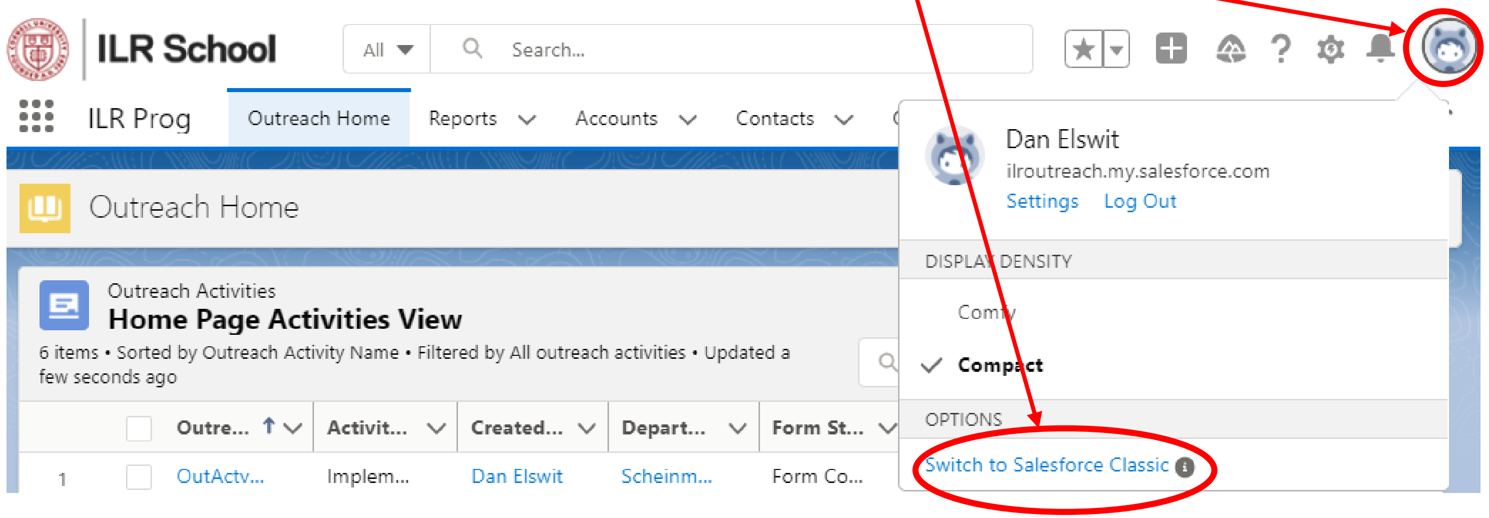
1. If your user interface looks similar to the screenshot below, you will need to switch to Lightning to use the Outreach Activity Form



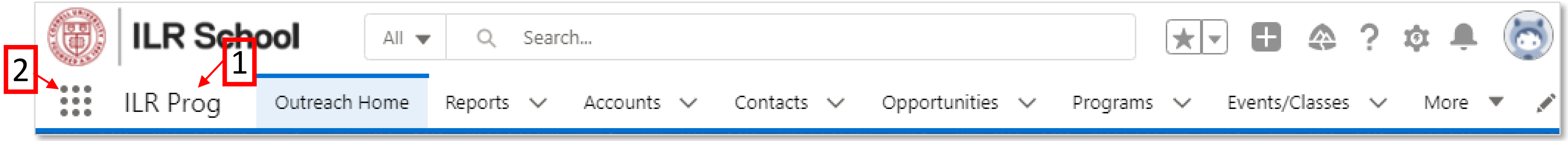
2. Click the “Switch to Lightning Experience” link at the top right

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”

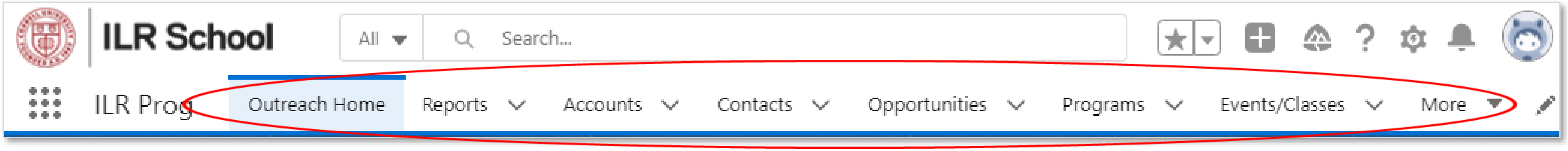


Navigating: Apps



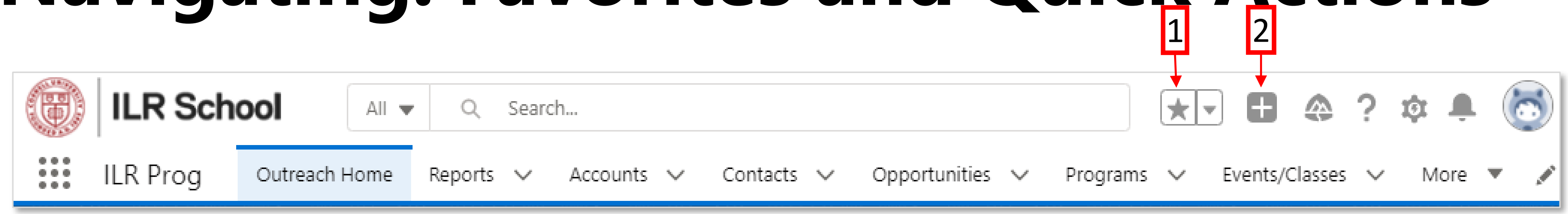
1. Apps
   - Apps are groupings of tabs related to a role or function. Apps each have a name. The most common one in use in ILR is called “ILR Prog”
   - Recently accessed items are also found under relevant tabs
2. The Waffle selects your App
   - Click the waffle and begin typing the desired item, 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



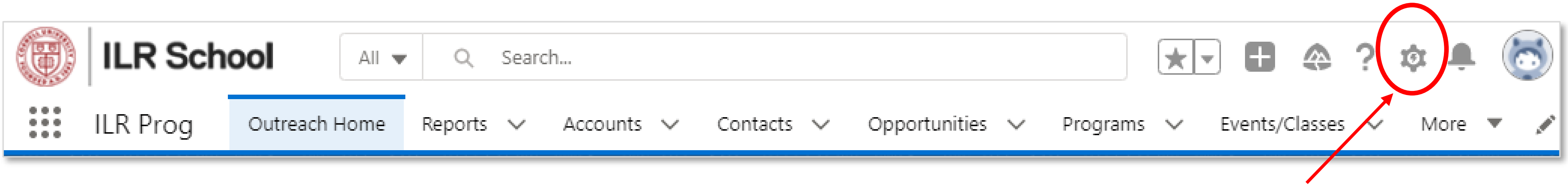
- Viewing data
  - Click tabs to display data from the named object
  - Click the down-arrow next to the tab to see your recently accessed data for the object
- Adding additional tabs
  - Click the Pencil icon at the right-hand end of the tab bar to add additional tabs
  - Viewing lists or records in 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



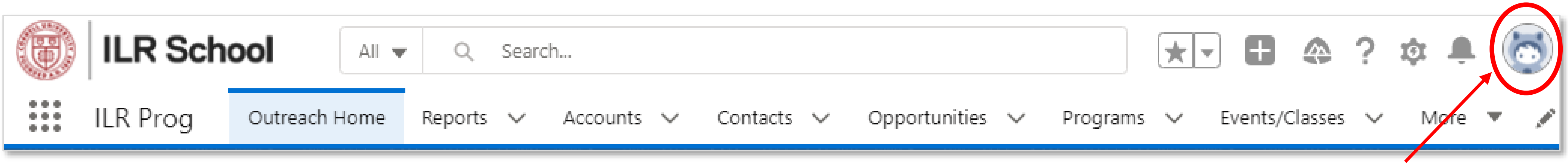
1. Favorites
   - Mark any page in Salesforce as a favorite (for example, any Activity Forms you are currently working with), and refer to them by clicking the drop-down arrow next to the star
   - To edit the favorites list, click the drop-down arrow and select “Edit Favorites”
2. Quick Actions
   -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



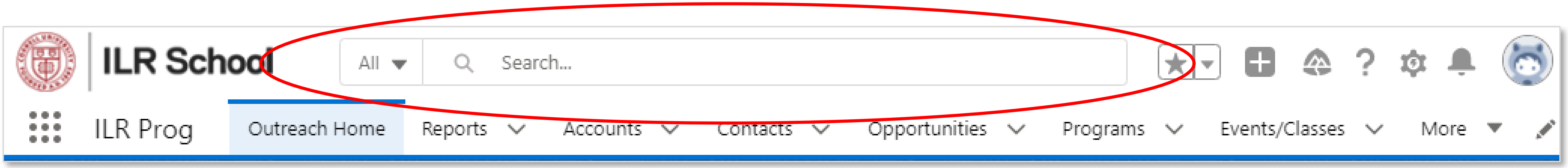
- The gear icon is for accessing Settings
- Occasionally there are reasons to go into Settings, which is why the icon is visible, but in general, do not click the Settings icon
- If you go into Settings, your familiar tabs will vanish and search will not work as you expect
- If this happens, click the 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 <u>but should not be changed</u>
- 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

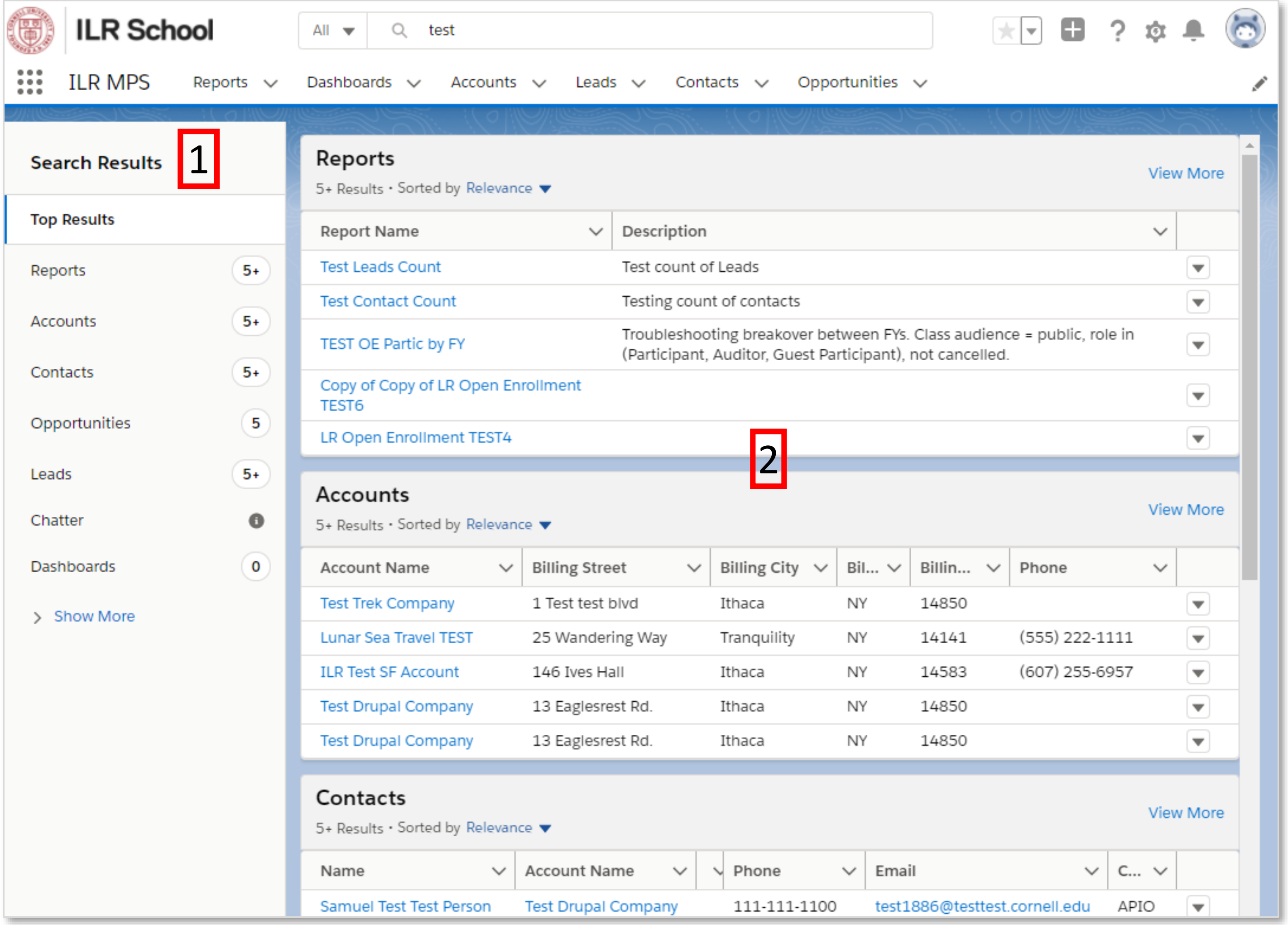


- Choose any searchable object in the dropdown list next to the search box. The default is “All”.
- Enter your search term in the search bar.
- The objects you use most frequently are at the top of the list, followed by the full list of searchable objects in alphabetical order.

Search Results

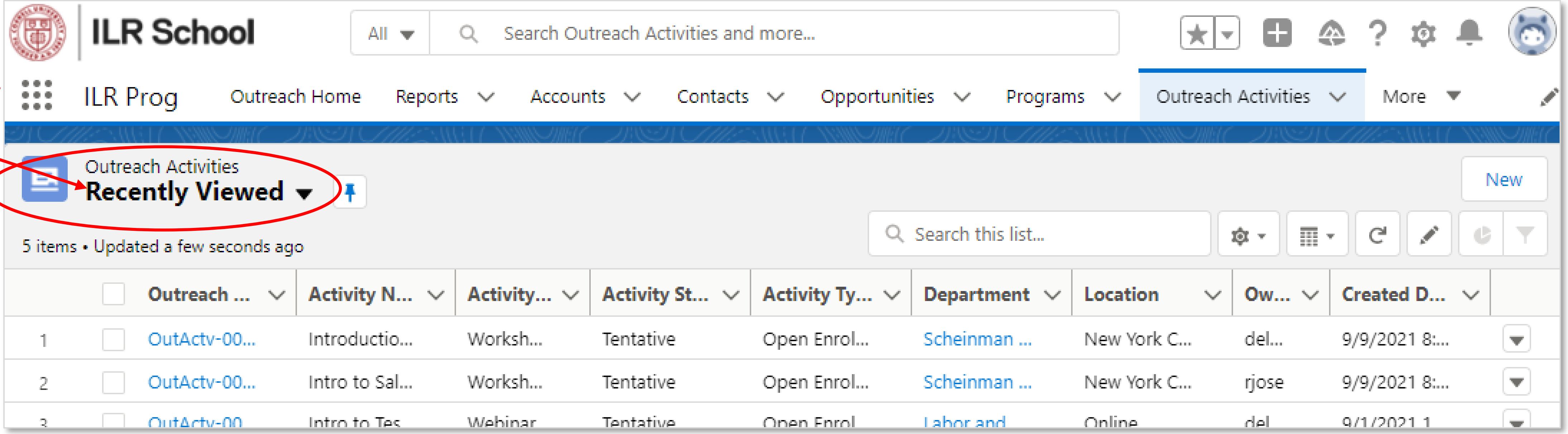
1. Along the left, objects where search results were found are listed in order by largest number of search results

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.



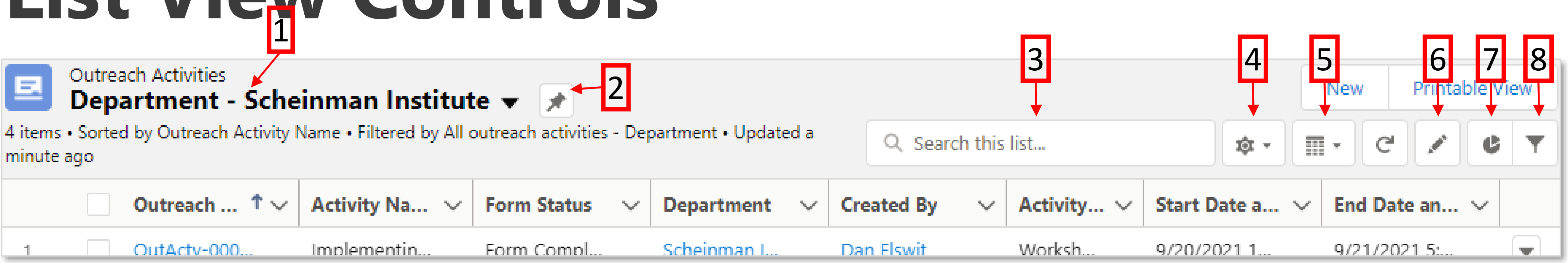
Object Pages and Listviews

Listview name



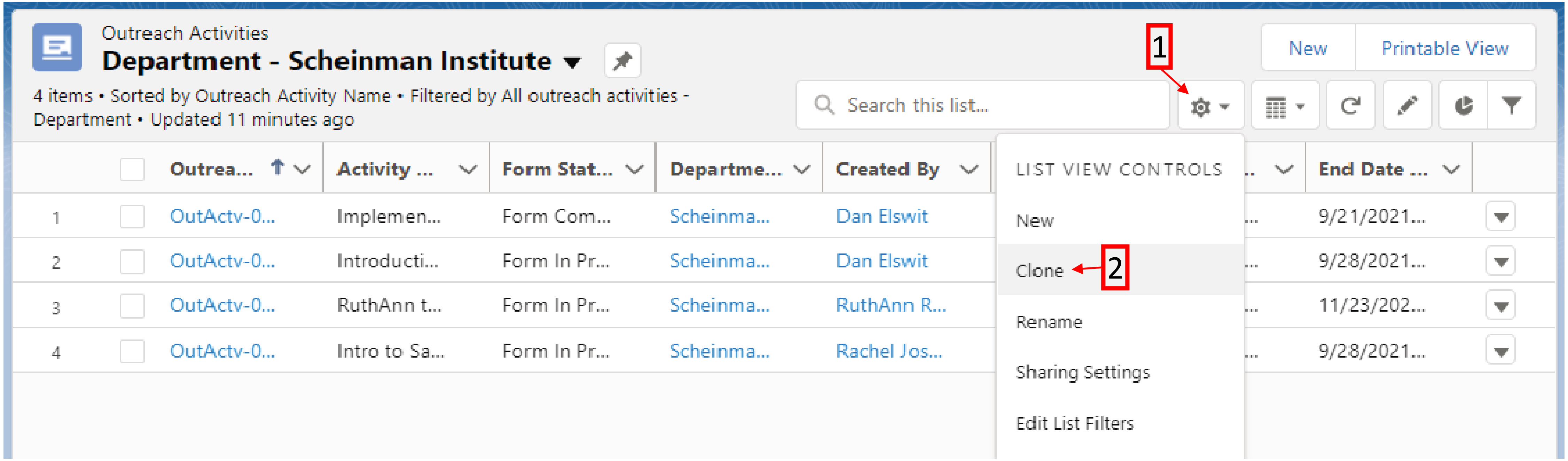
- Click on a tab to see a listview with multiple items. The default listview is "Recently Viewed"
- There are multiple listviews that can be filtered and sorted in different ways
- See a menu of all listviews by clicking the listview name. The menu is divided into two sections – recently viewed listviews, 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



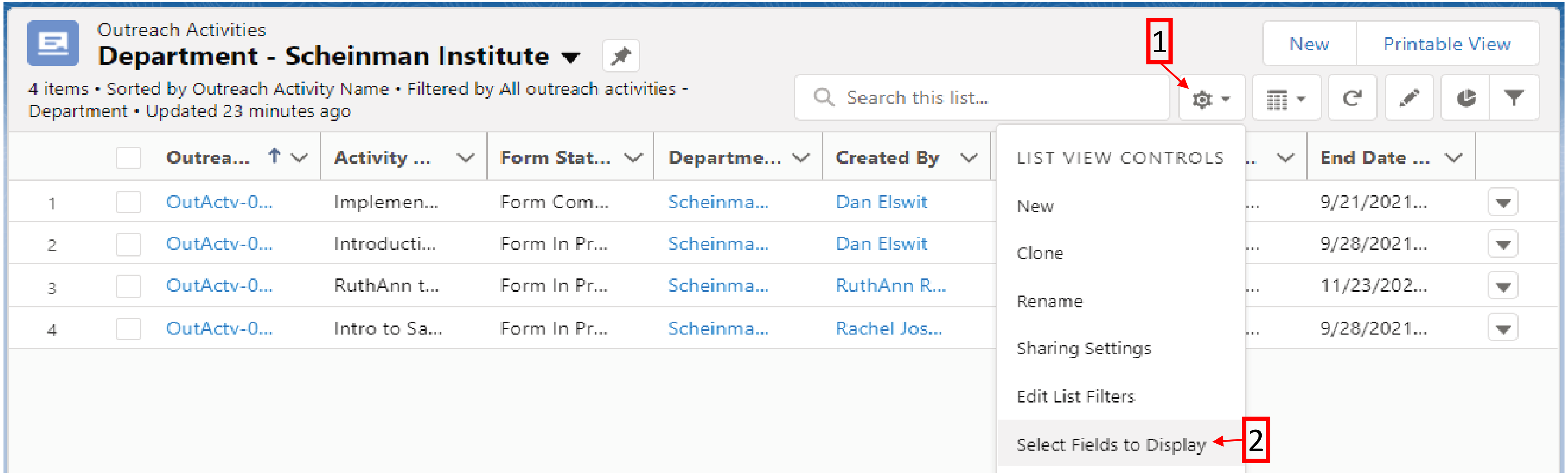
1. List Views Dropdown Menu – Select a list to view
2. Pin Icon – Designate a list as the default list view for the object
3. List View Search – Find records in a list view
4. List View Controls – Clone and rename lists, add/rearrange columns, and more
5. Layout Control – View your list of records in 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



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

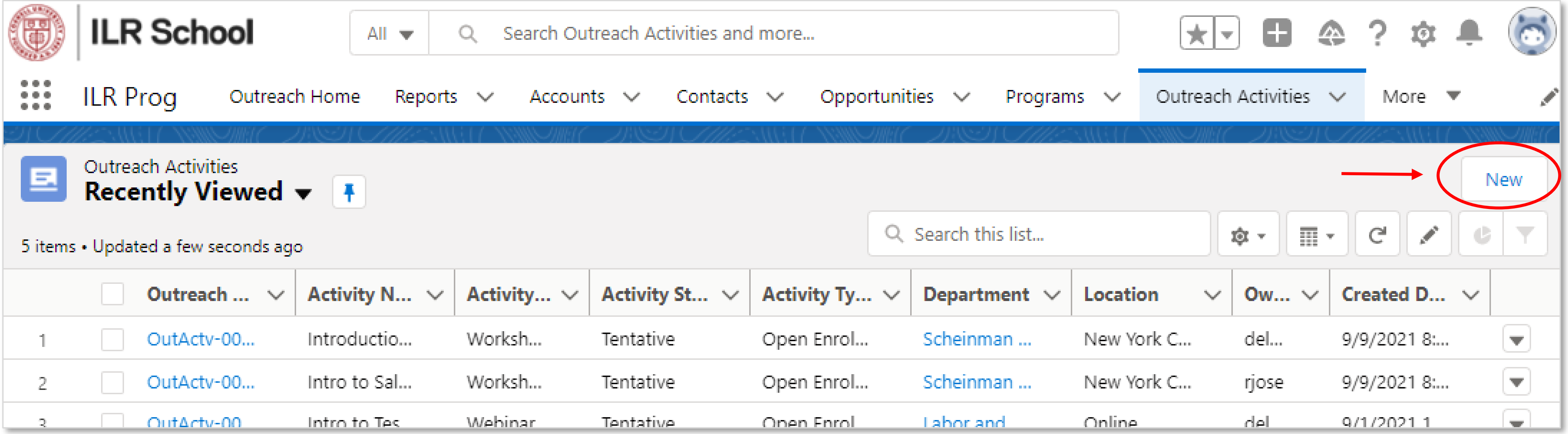
Customize a Cloned Listview



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)

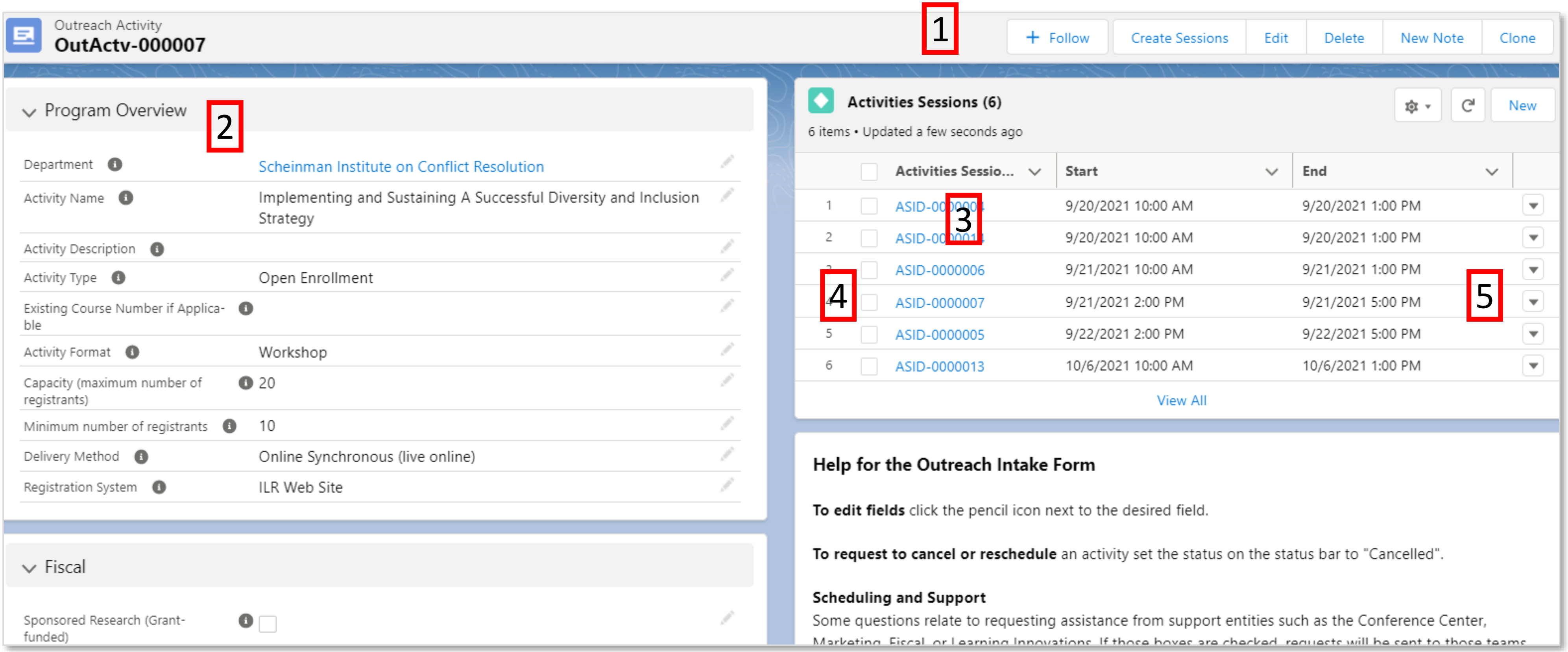
1. Click the Gear icon
2. Click “Select Fields to Display”
3. Select desired fields from the scrolling list on the left and move them to or from the Listview by clicking the arrow icons between the scrolling lists.
4. There is a limit of 15 fields in a Listview

Add New Data



- 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



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

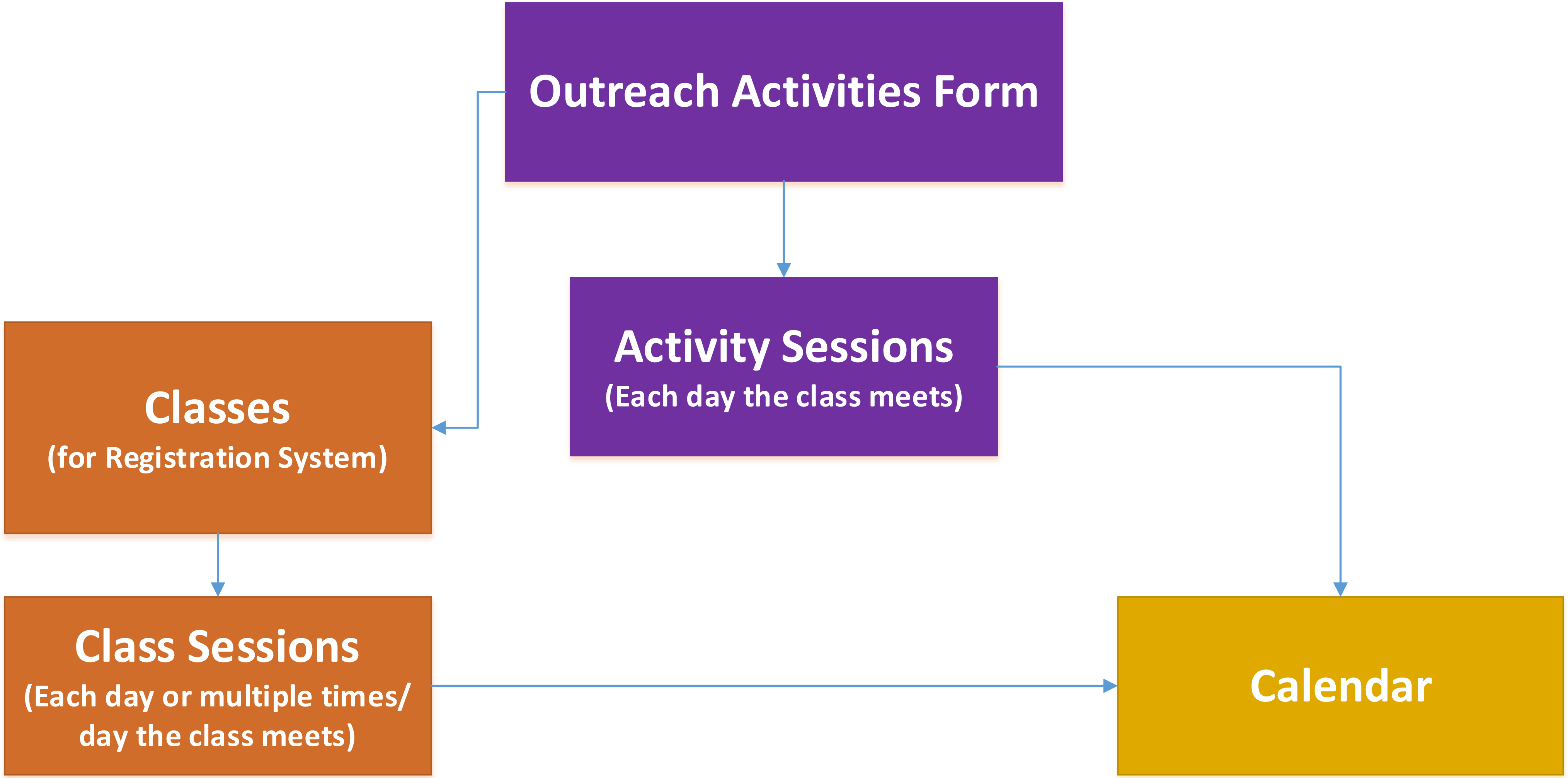
Report and Dashboard Generator

- 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…

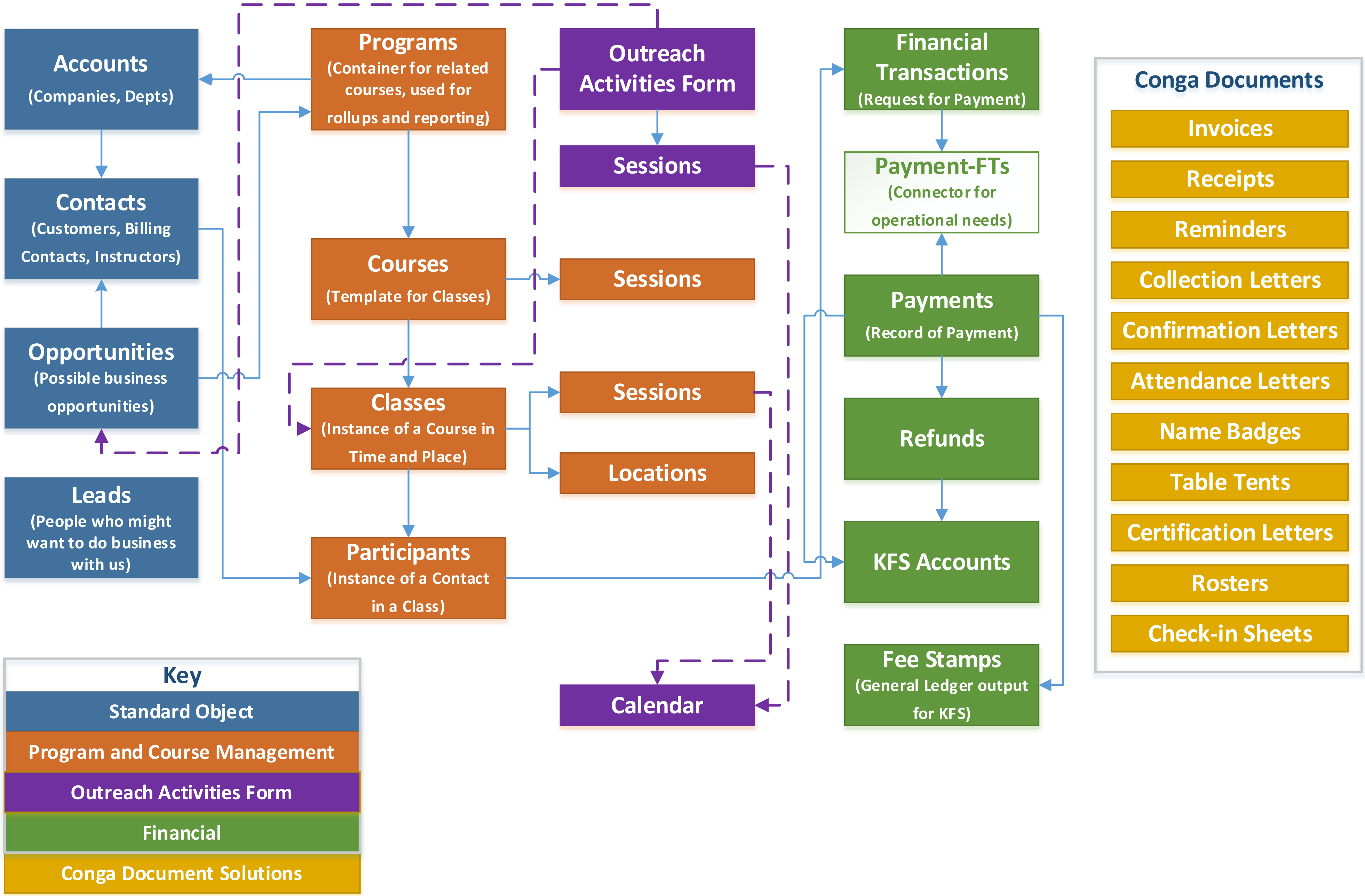
Questions and Further Training

- 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

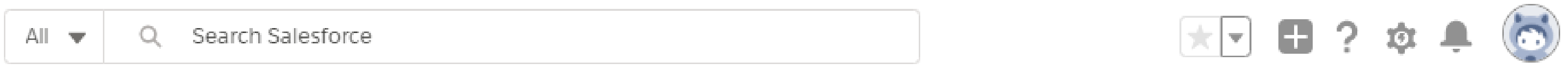
Overview of the Form

- 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

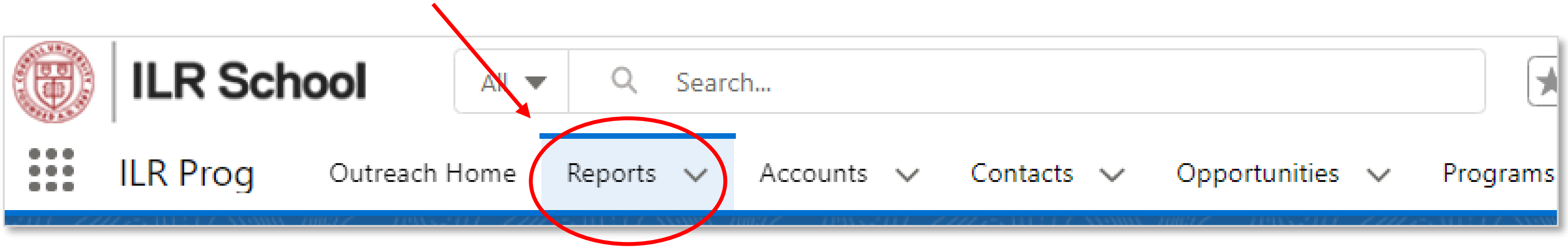


ListViews vs Reports

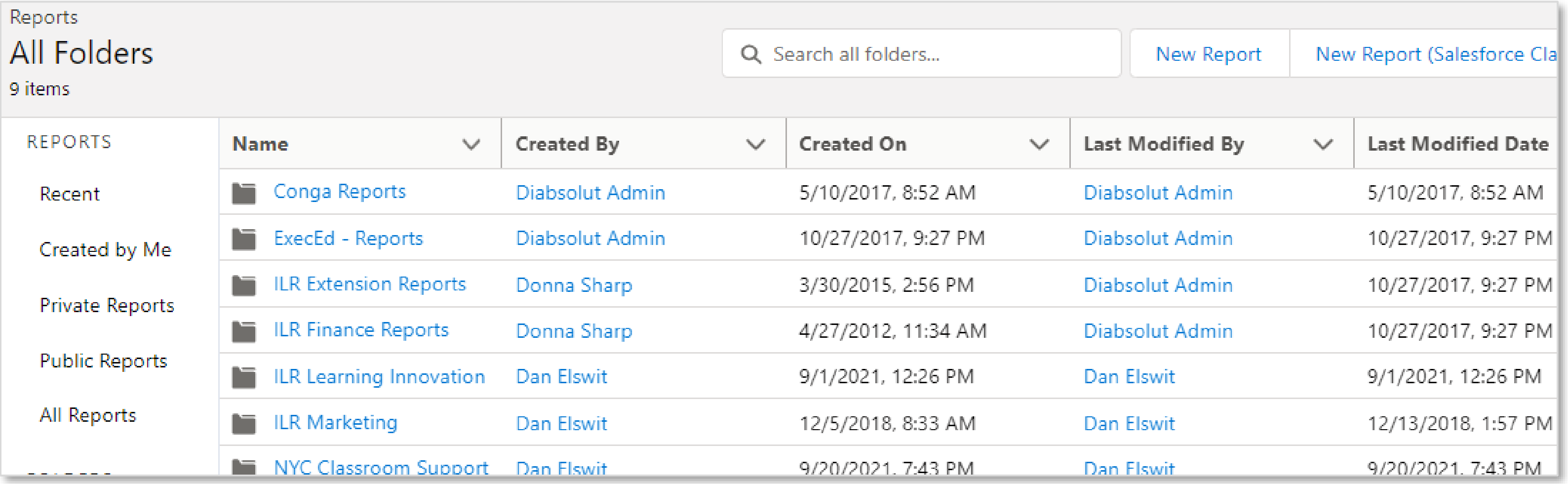
	ListView	Report
Number of Fields	15	255
Number of Tables	1	4
Grouping	No	Yes
Temporary formulas	No	Yes
Summary view	No	Yes
Export to Excel	No	Yes
Can run on a schedule	No	Yes
Quick and easy	Yes	No
In-Line editing	Yes	No

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

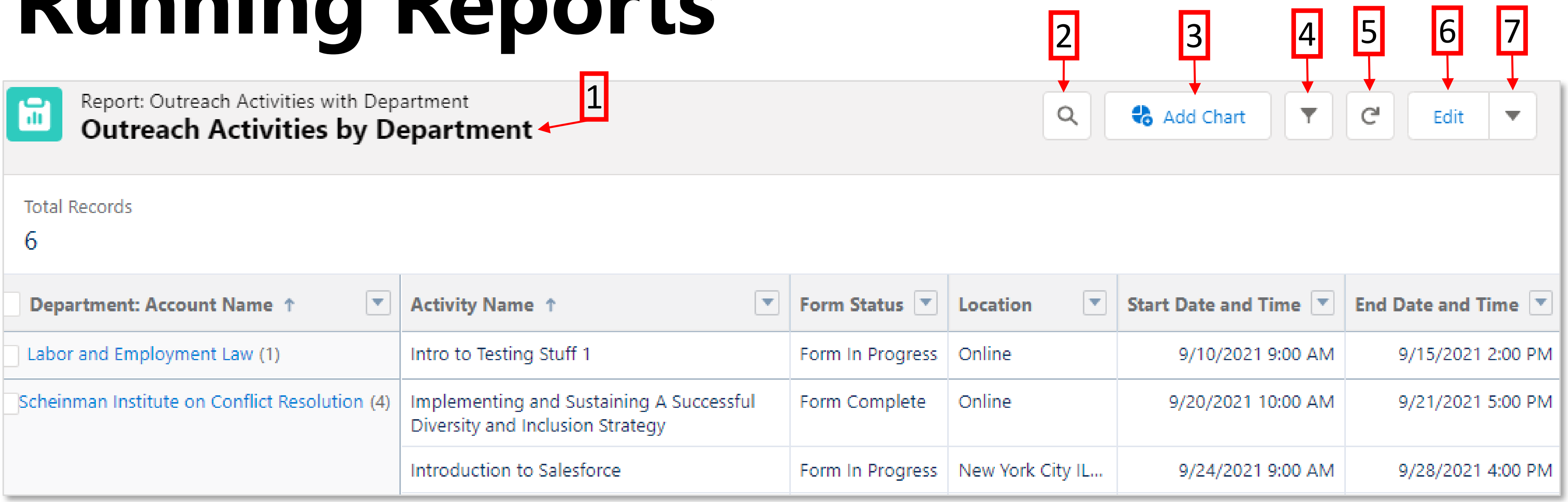


Name	Created By	Created On	Last Modified By	Last Modified Date
Conga Reports	Diabsolut Admin	5/10/2017, 8:52 AM	Diabsolut Admin	5/10/2017, 8:52 AM
ExecEd - Reports	Diabsolut Admin	10/27/2017, 9:27 PM	Diabsolut Admin	10/27/2017, 9:27 PM
ILR Extension Reports	Donna Sharp	3/30/2015, 2:56 PM	Diabsolut Admin	10/27/2017, 9:27 PM
ILR Finance Reports	Donna Sharp	4/27/2012, 11:34 AM	Diabsolut Admin	10/27/2017, 9:27 PM
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



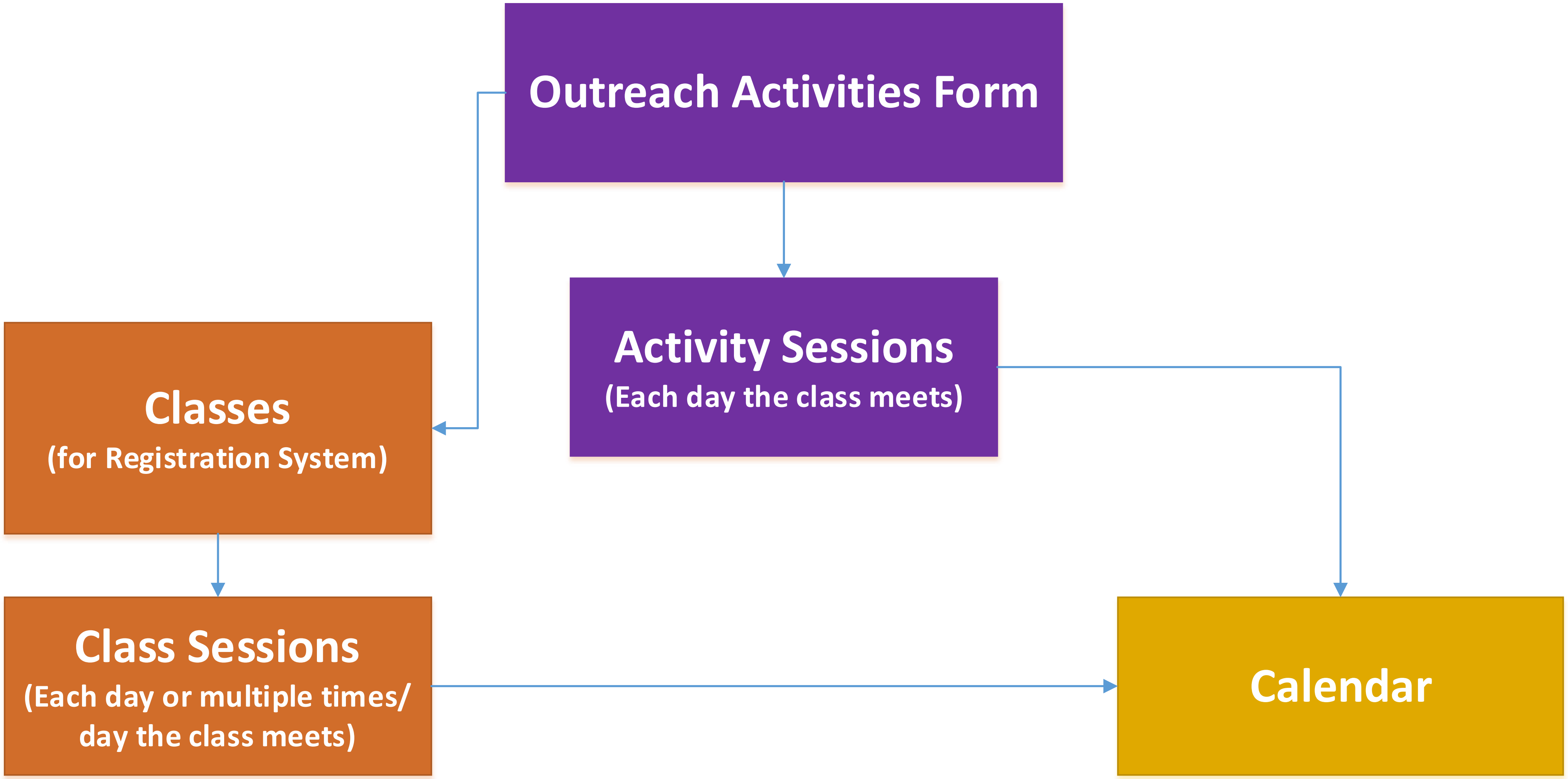
Department: Account Name ↑	Activity Name ↑	Form Status	Location	Start Date and Time	End Date and Time
Labor and Employment Law (1)	Intro to Testing Stuff 1	Form In Progress	Online	9/10/2021 9:00 AM	9/15/2021 2:00 PM
Scheinman Institute on Conflict Resolution (4)	Implementing and Sustaining A Successful 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

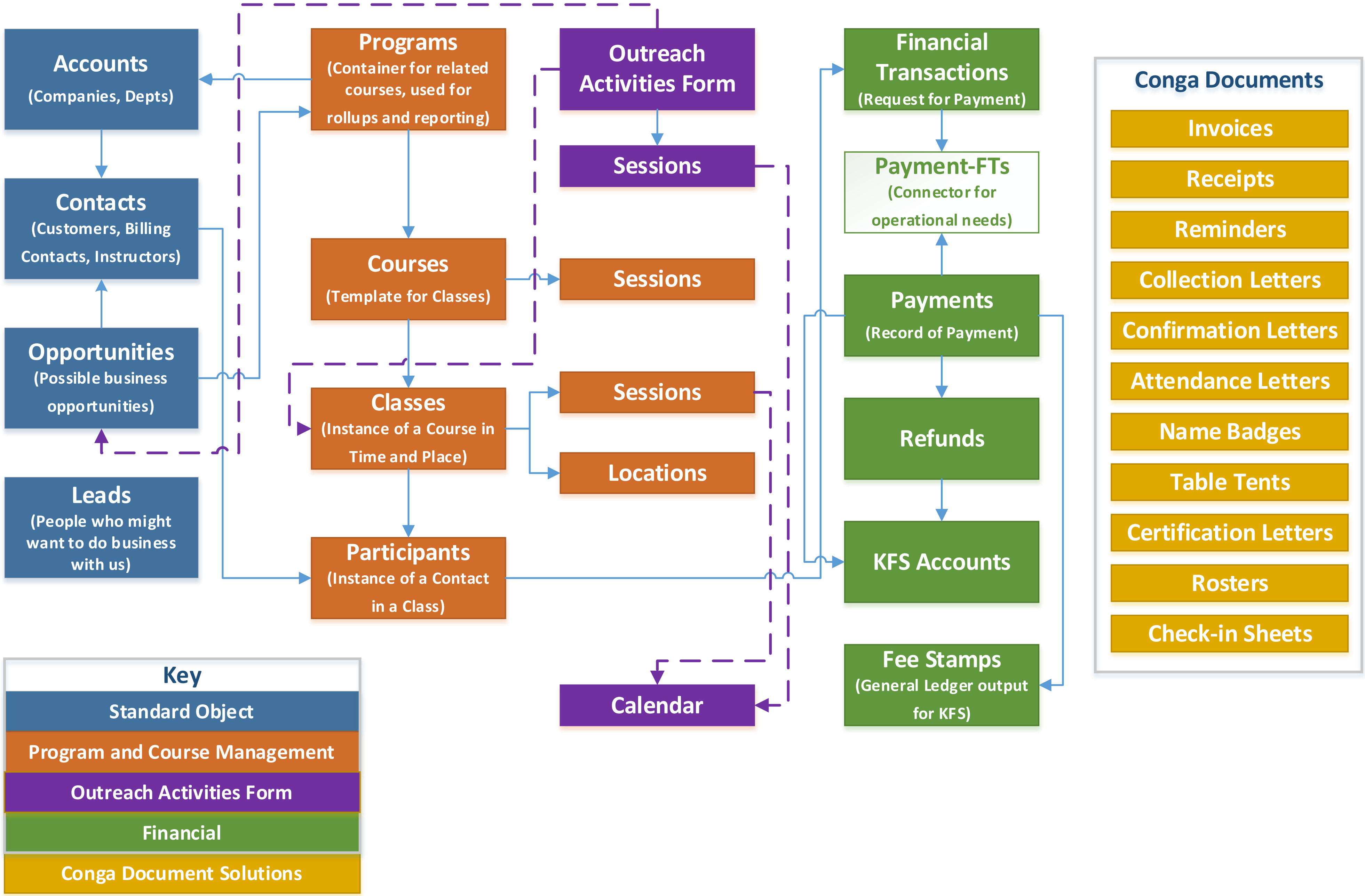
Preparing to Create a Report

- 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

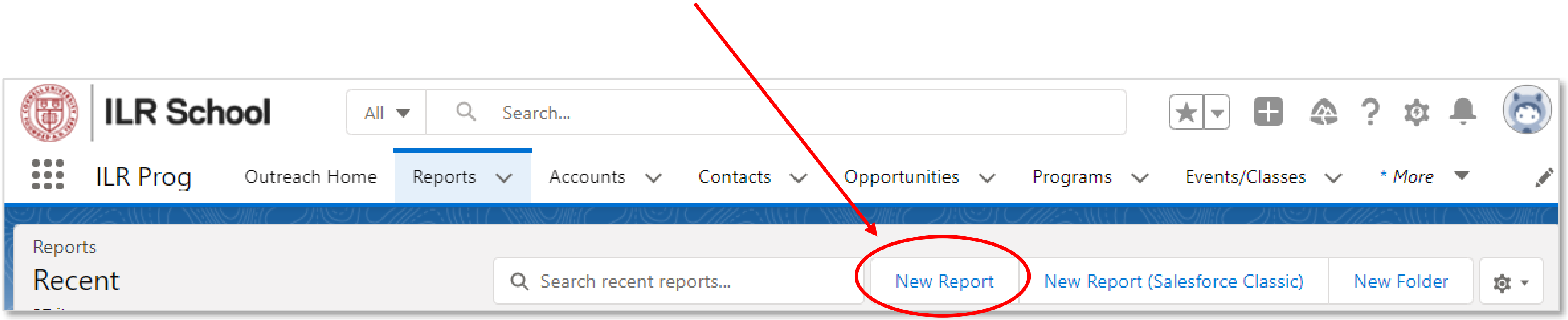


ILR Outreach Salesforce Schema Overview



Creating Reports

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

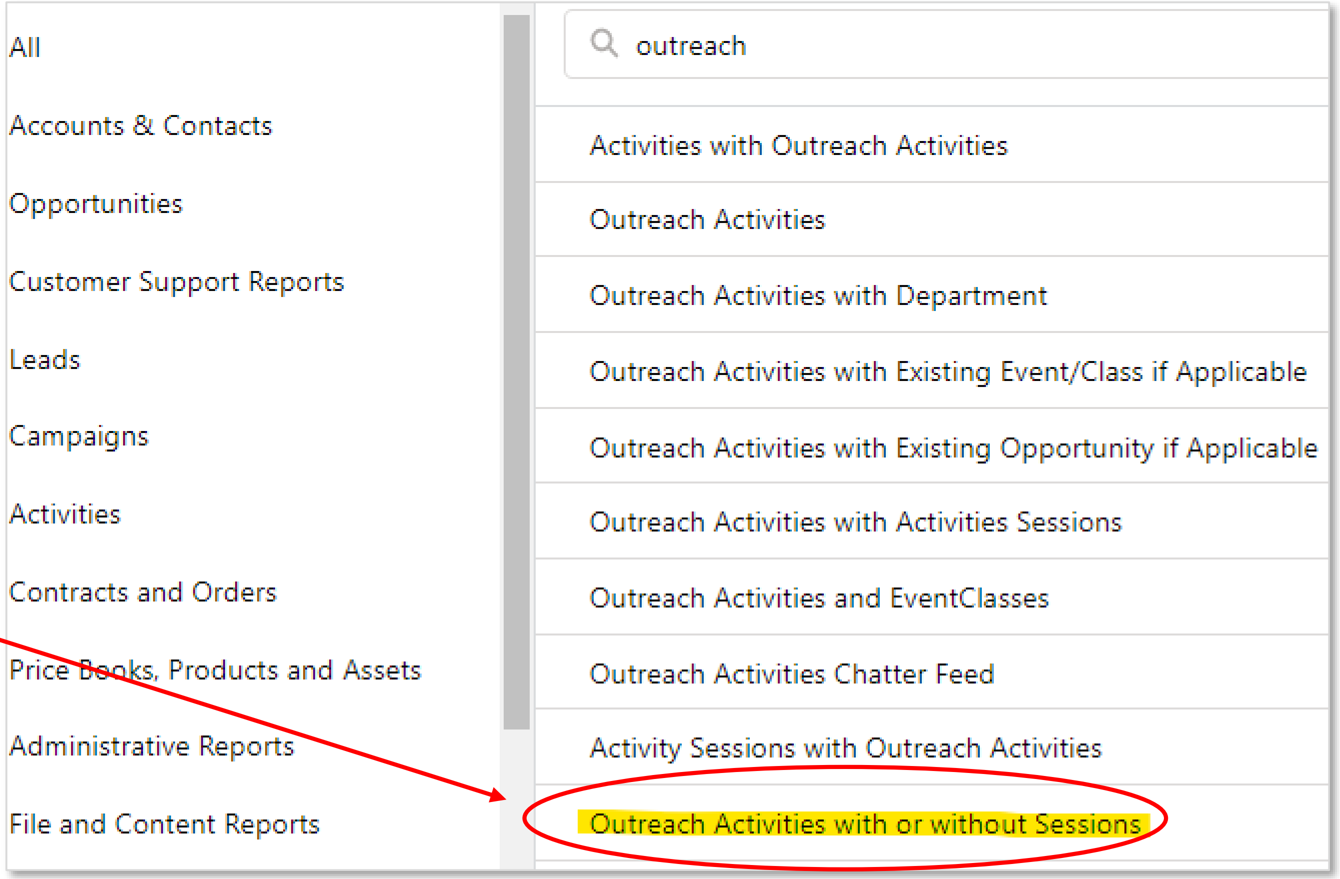


Report Types

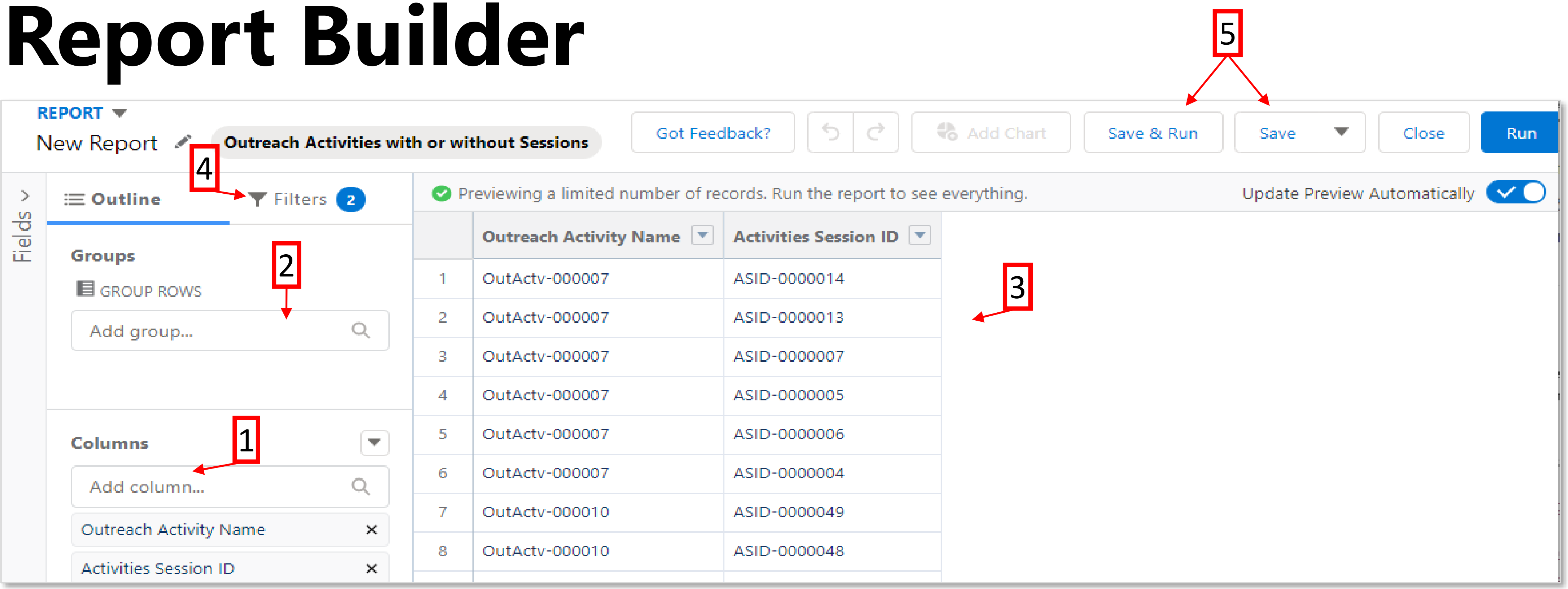
- Report types are created by system administrators
- Report types define relationships between related tables of data
- There are 6 related tables and 10 potential report types related to the Activity form, but you will be concerned with only 2 related tables and 1 report type
- The two related tables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

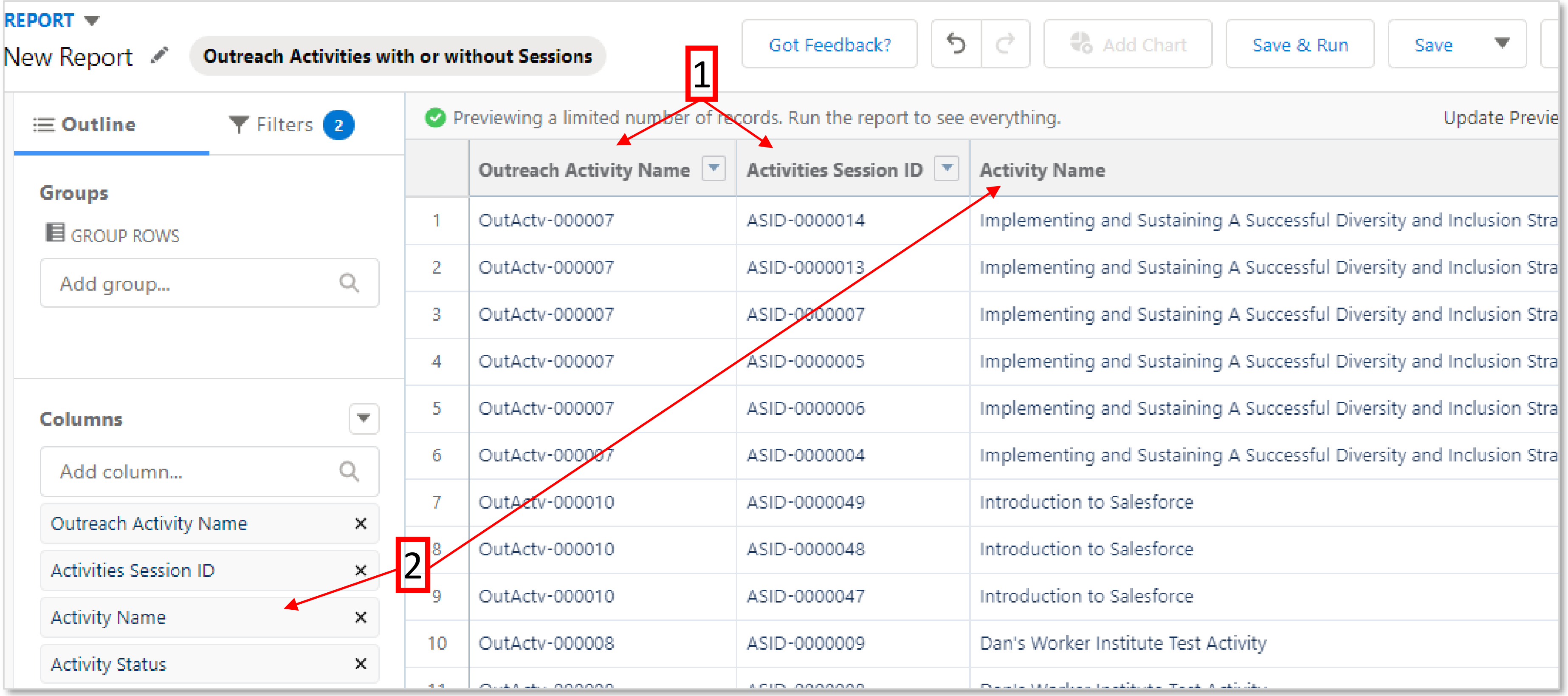


Report Builder



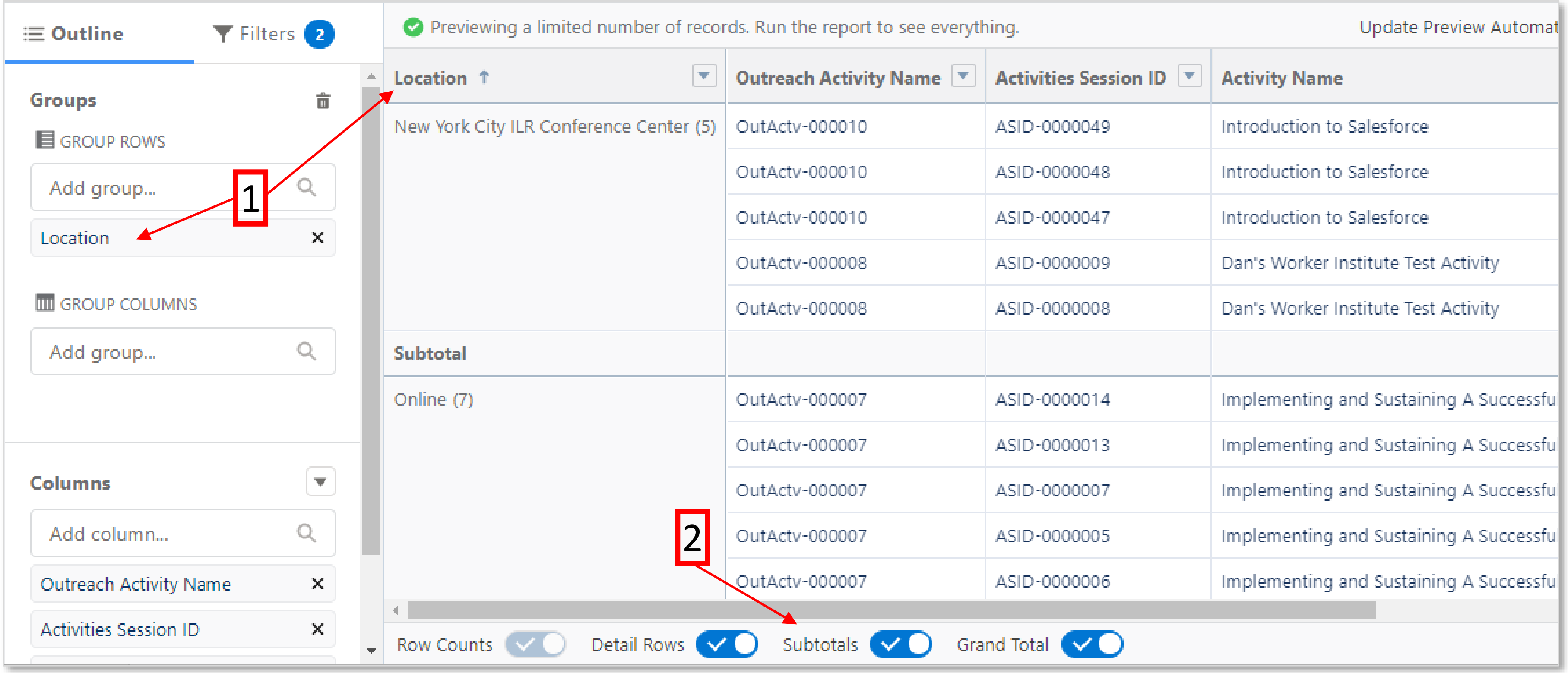
1. Add fields here, click in the blank and being typing the name of the desired field
2. Group by fields here
3. Your report will appear here as you add fields
4. Filter your report by clicking here
5. Save or save and run by clicking here

Building the Report



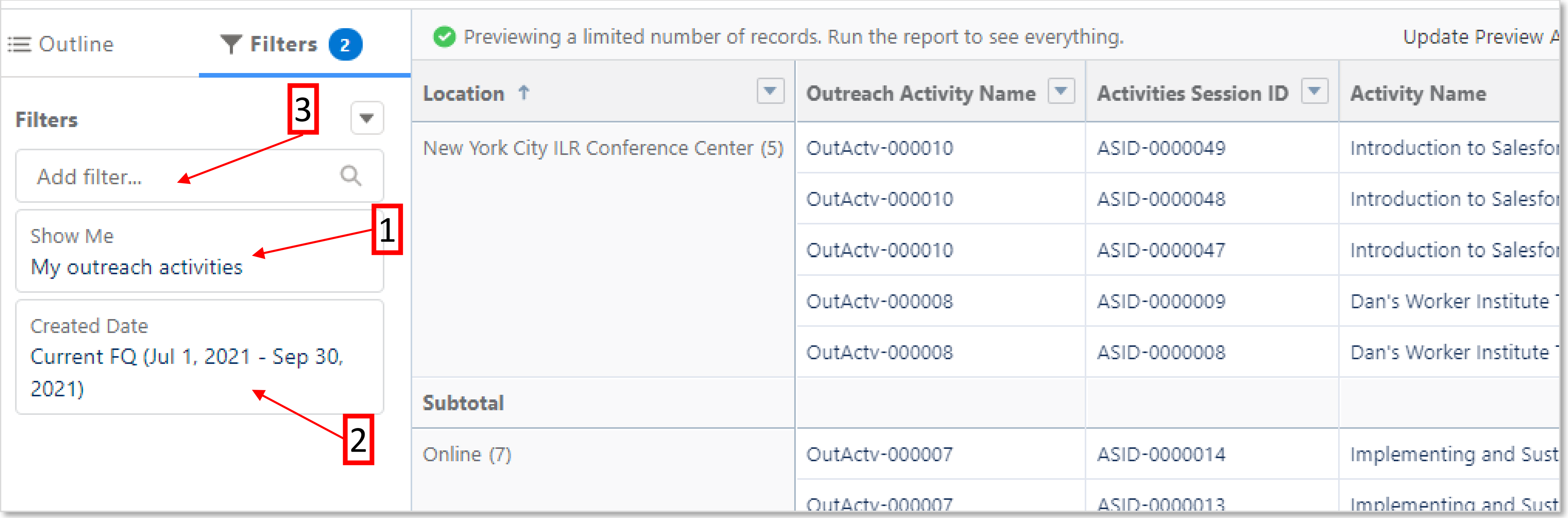
1. Outreach Activity Name and Activities Session ID are “live” links in the final report that, when clicked, take you to those records
2. Add fields as columns and they appear in real-time to the right
3. The data in the builder is just a sample and does not include all data. To see all data, run the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

Grouping by Fields



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



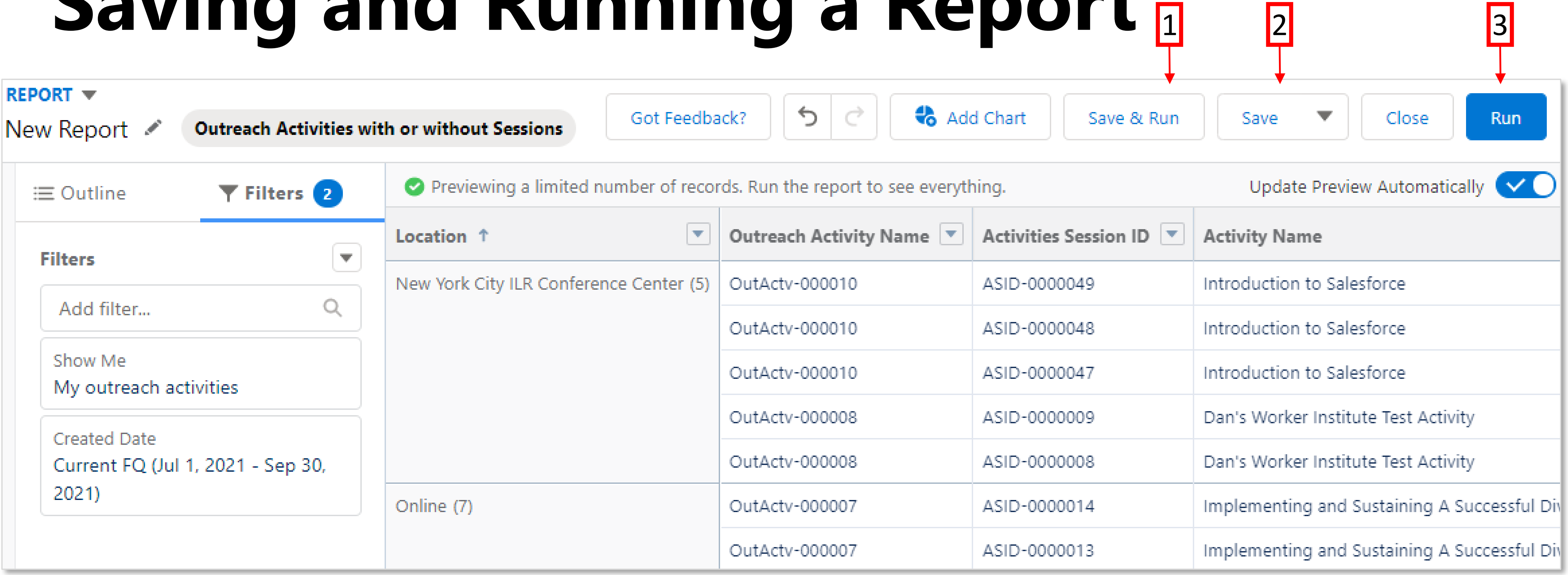
Major "gotcha"! By default all reports are filtered for items you own but odds are you don't own any activities!

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



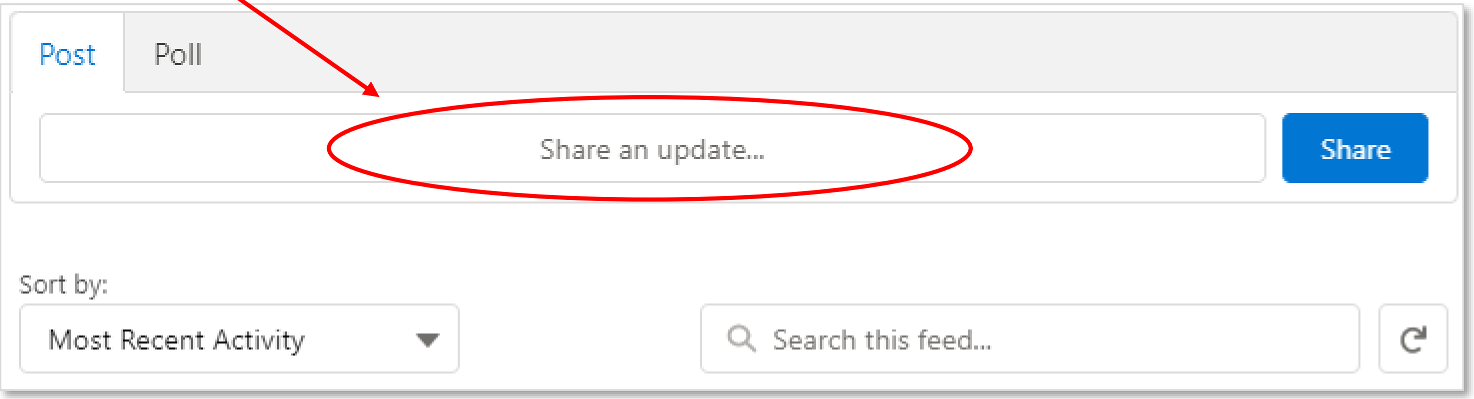
1. Save the report and then immediately exit the Builder and run it
2. Save the report but do not exit the Builder
3. Run the report but do not save it (**Caution**! If you do not Edit the report and come back into the Builder and save it you will lose it)

Chatter

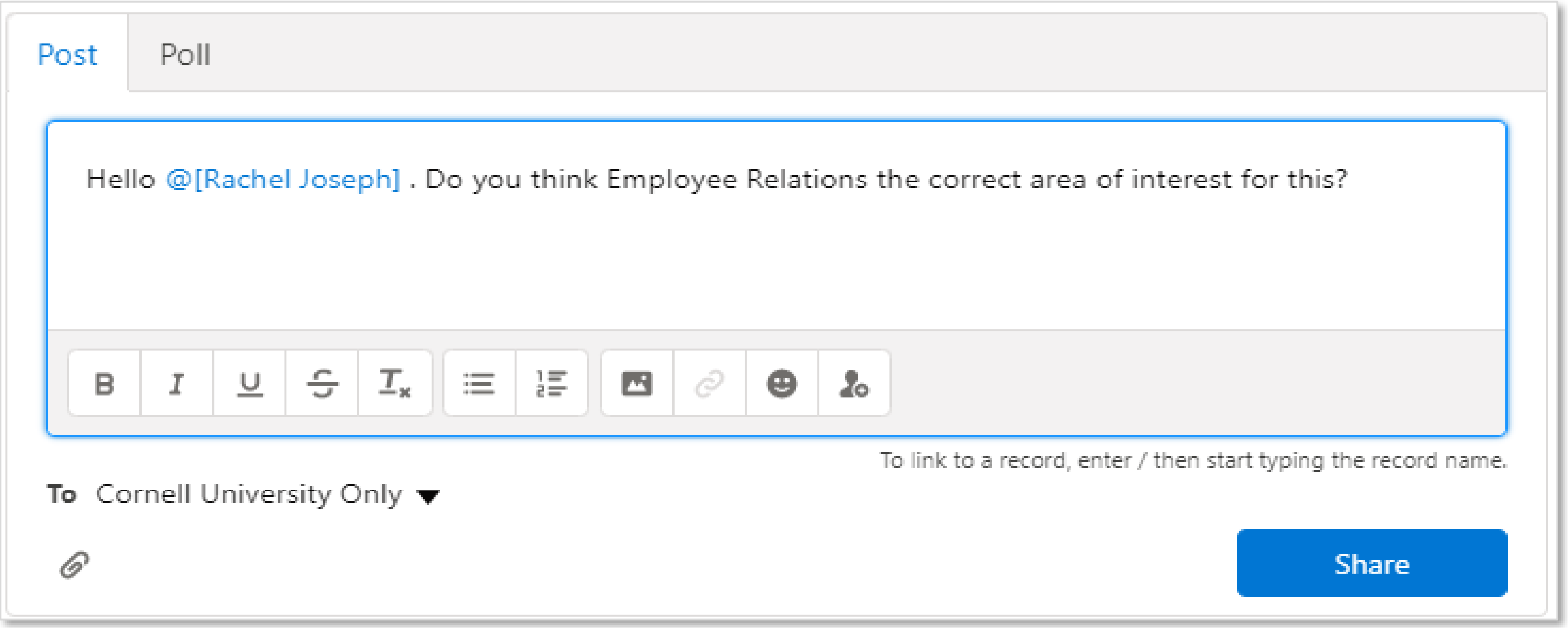
- Chatter is a Chat mechanism built into Salesforce
- Allows conversations between Salesforce users
- Two types of conversations
  - Updates – used to announce changes made to the record (form)
  - Comments – for more general conversation with other people
- Two ways to use Chatter
  - Inside Salesforce – 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

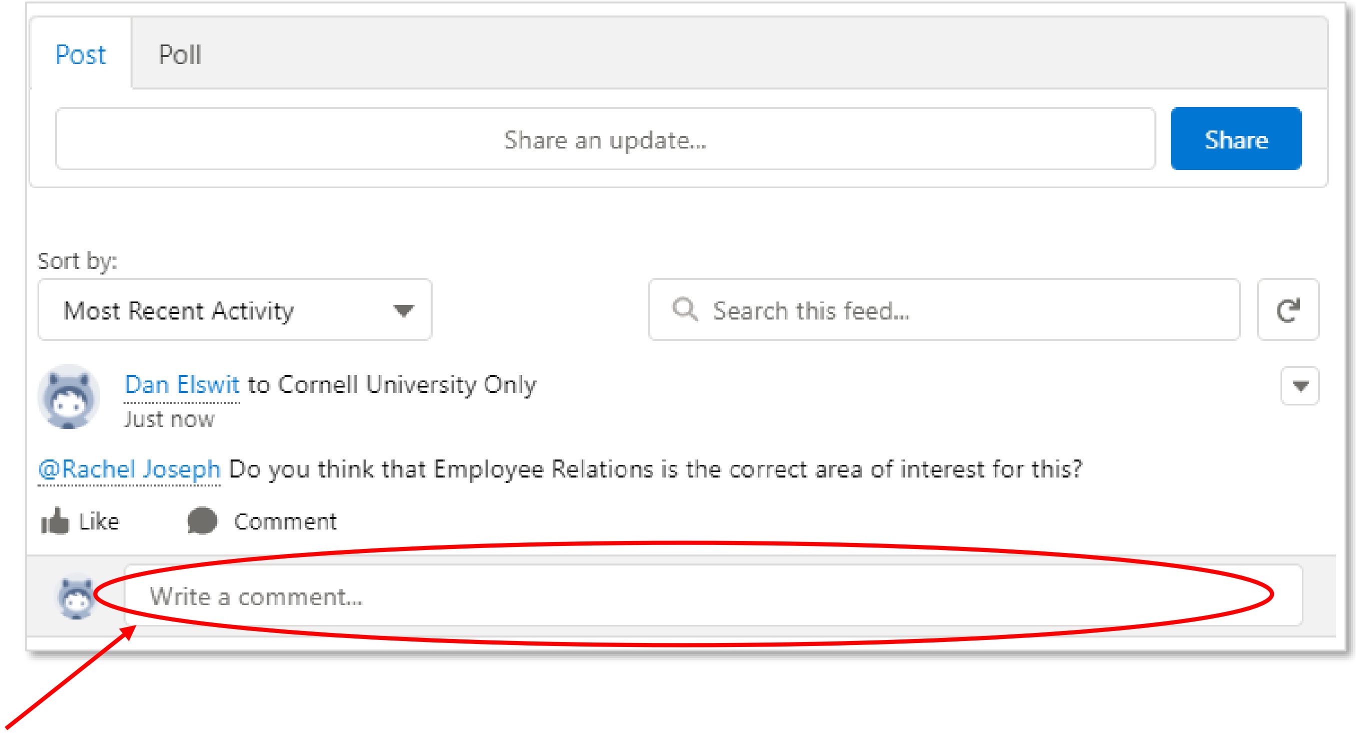


Chatter Threads



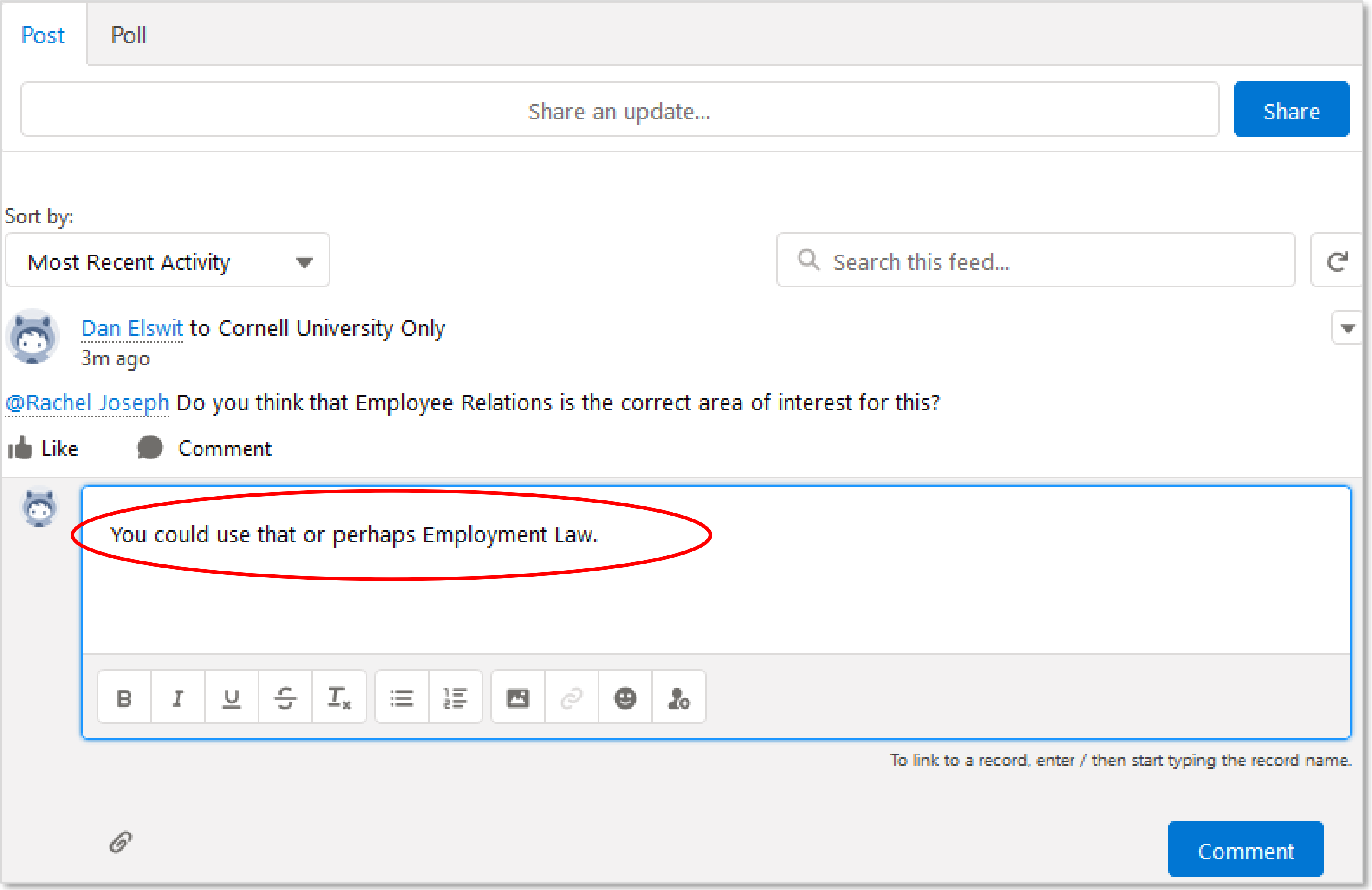
- Conversations are organized into threads
- Bring someone into a thread with the "@" sign
- Type "@" and start typing their name, then select the name to include them in the thread, and finish your message
- Once a thread starts, replies will notify everyone who was mentioned

Chatter Threads

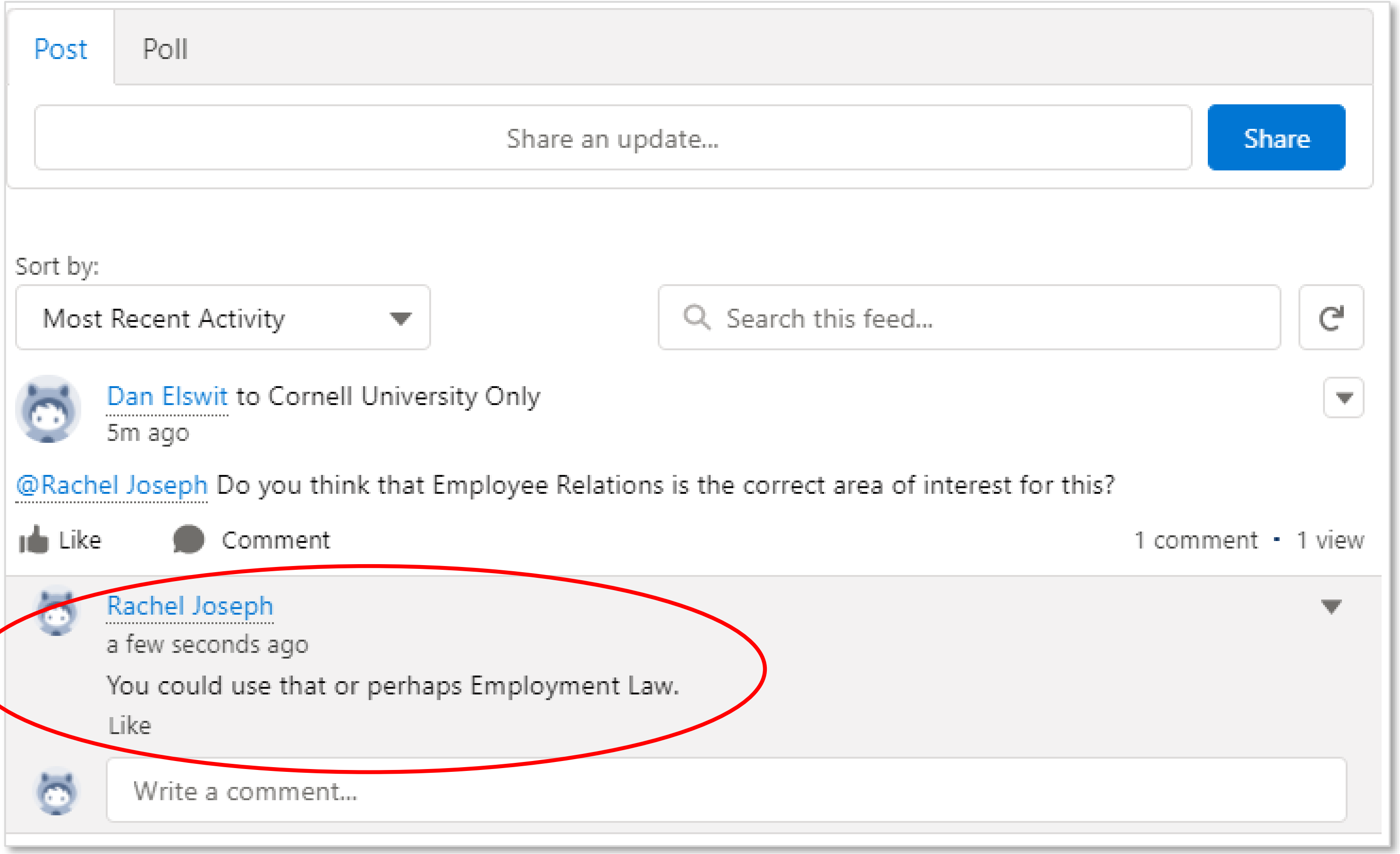


- To comment on an existing thread, find the thread and use the associated comment box under that thread. Be sure to pick the correct comment box for the thread you want to comment on
- Once there are more than 3 comments in a thread, earlier ones are hidden, but can be displayed by clicking the “more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

Chatter Threads



Chatter Threads

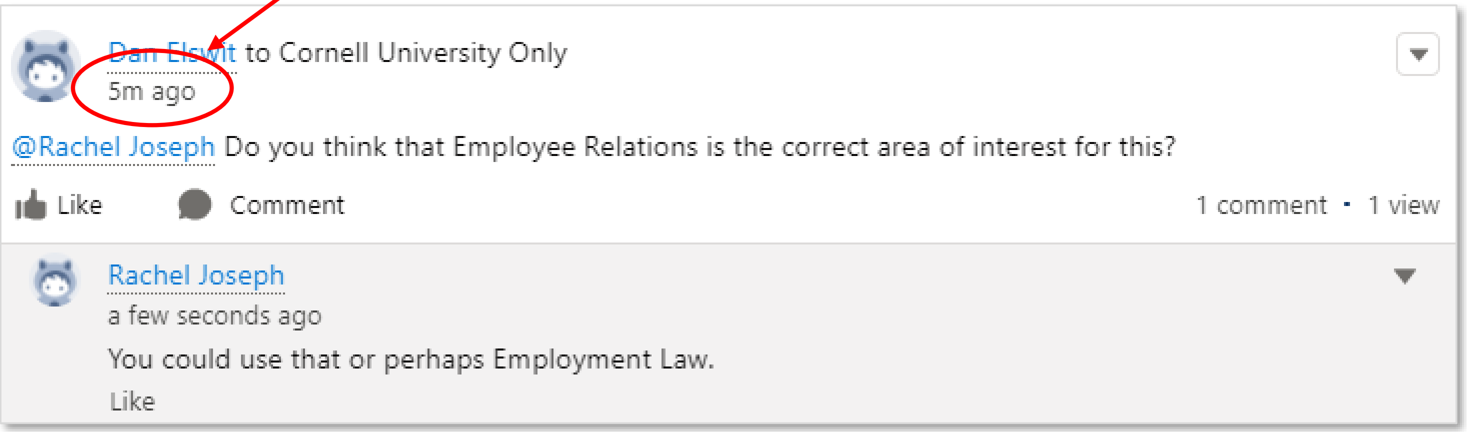


Too Many Email Notifications!

- 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)

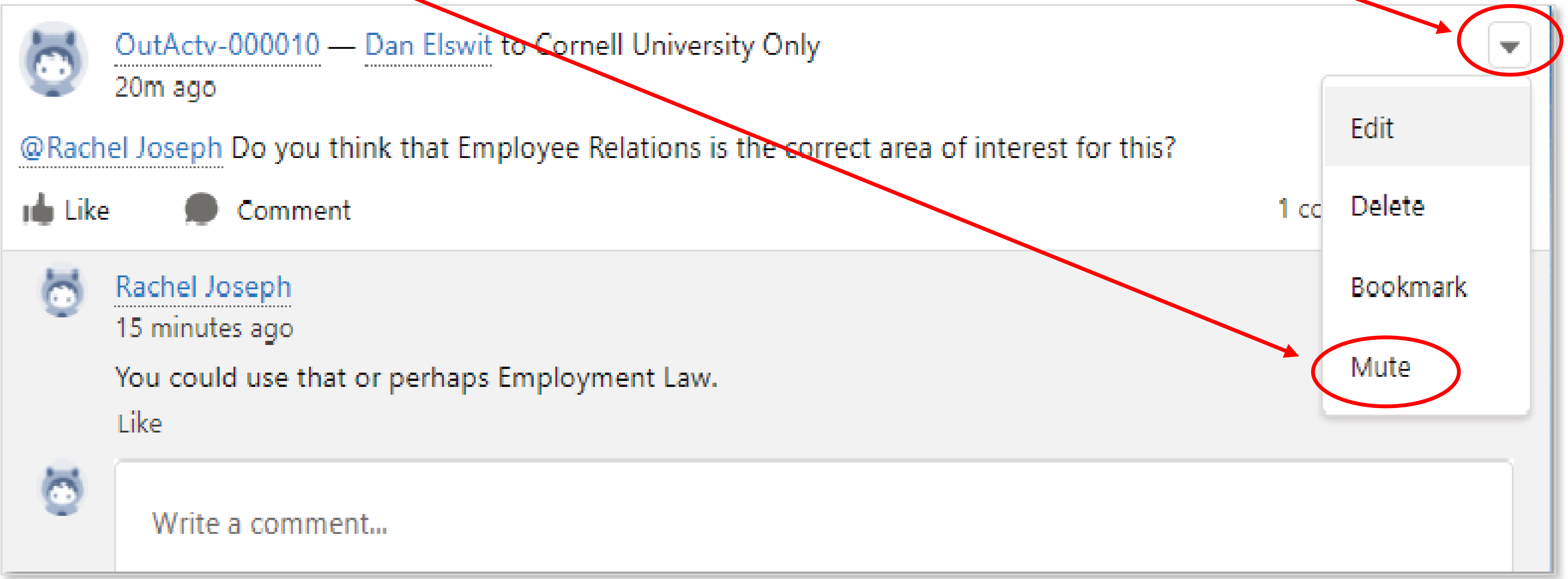
Mute a Chatter Thread (slide 1)

- 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