

Salesforce Certified Admin and App Builder

Lesson 23—Help and Training



What You'll Learn

- Using Answers and Ideas
- Searching for a Help Topic
- Contacting Support
- Using Trust Site
- Searching Known Issues

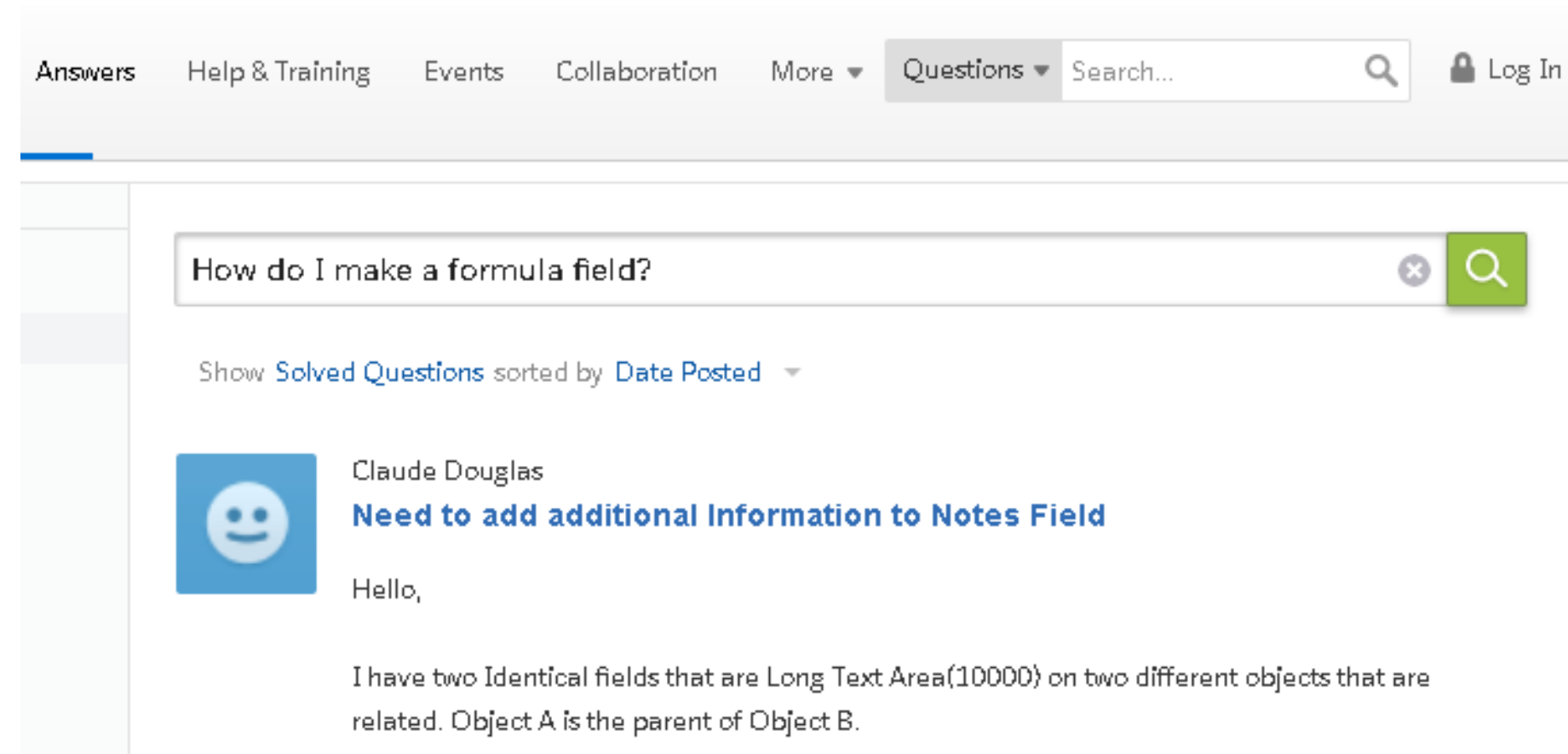


Using Answers

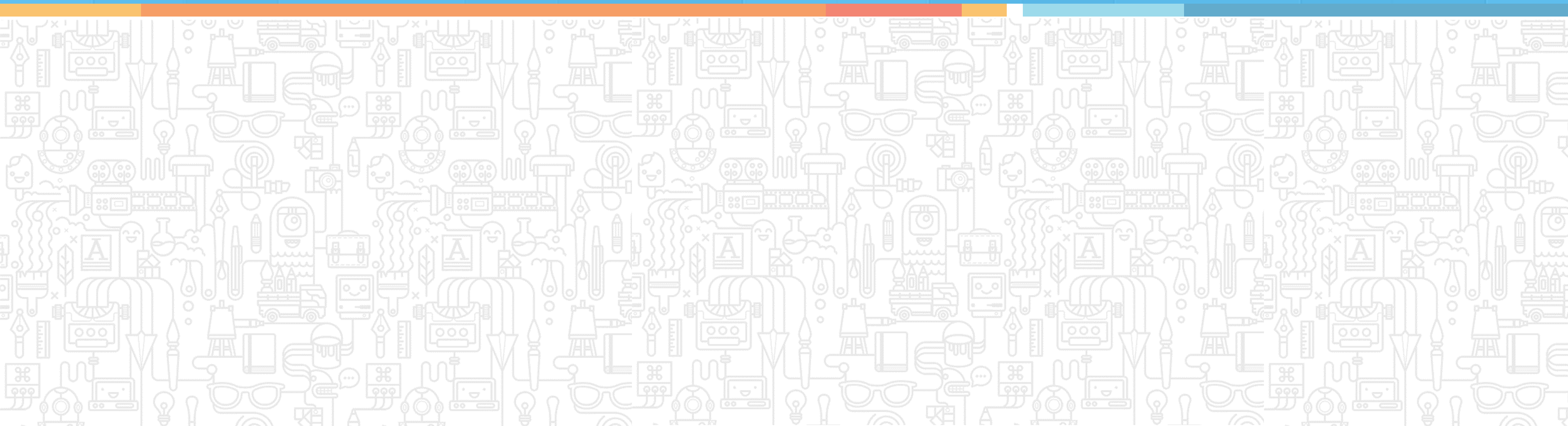


Remember the following points when using Answers:

- Answers is a feature of the Community application.
- Users can post questions and community members can answer.
- Community members also vote on the best answer.
- The person who asks the question can mark one answer as the best.



Using Ideas



Keep in mind the following points:

- The Idea Exchange offers the user community a way to suggest and vote on new product enhancements.
- If you have an idea you are passionate about, make sure you submit a vote.
- The popularity of an idea helps the Salesforce product team determine which ideas should be taken under consideration.



VOTE
4190 Points



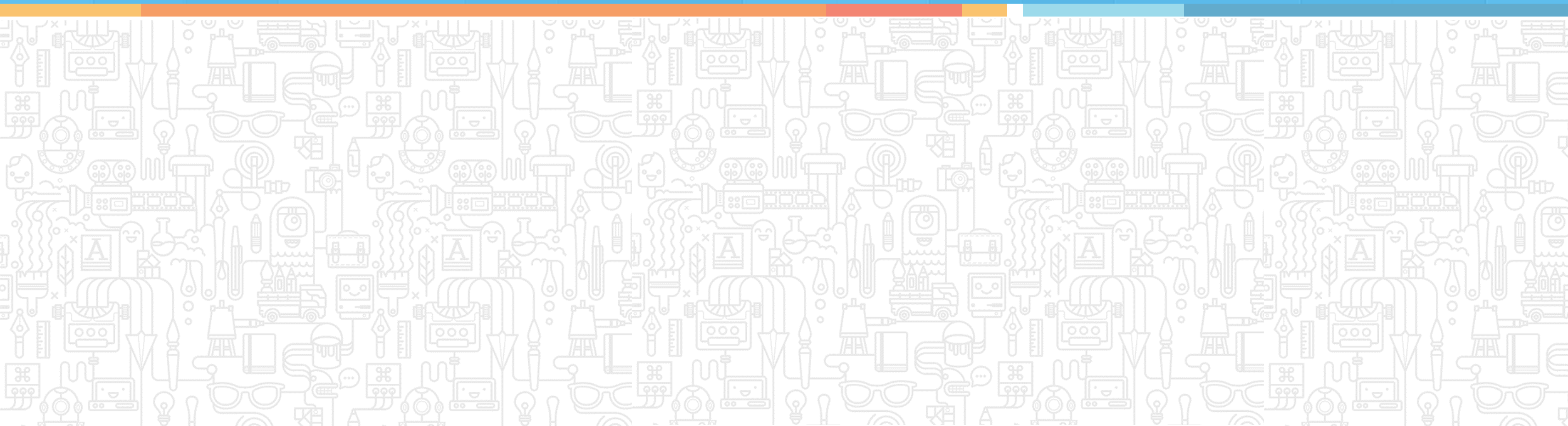
John-Adrian Pipe

Ability to prevent deletion of Activity History

PRODUCT TEAM REVIEW

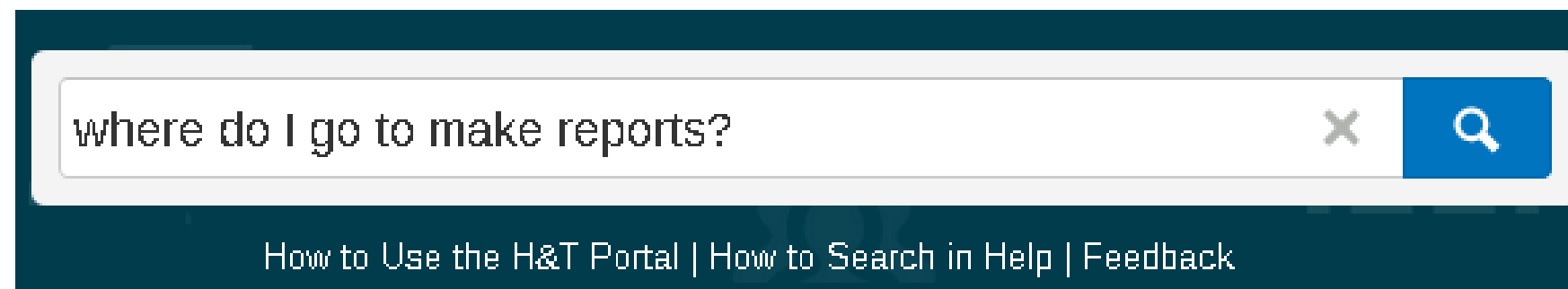
Surely I can't be the only one who has noticed this one... Basically, although we can prevent users from deleting open activities from their calendar/tasks, there's nothing preventing them from closing the task as 'completed' and then deleting it from their Activity history - so effectively the task may as well have never existed for reporting purposes. Even the SFDC help desk has admitted this is a flaw. Clearly this leaves the platform open to abuse by the unscrupulous. Surely...

Searching for a Help Topic



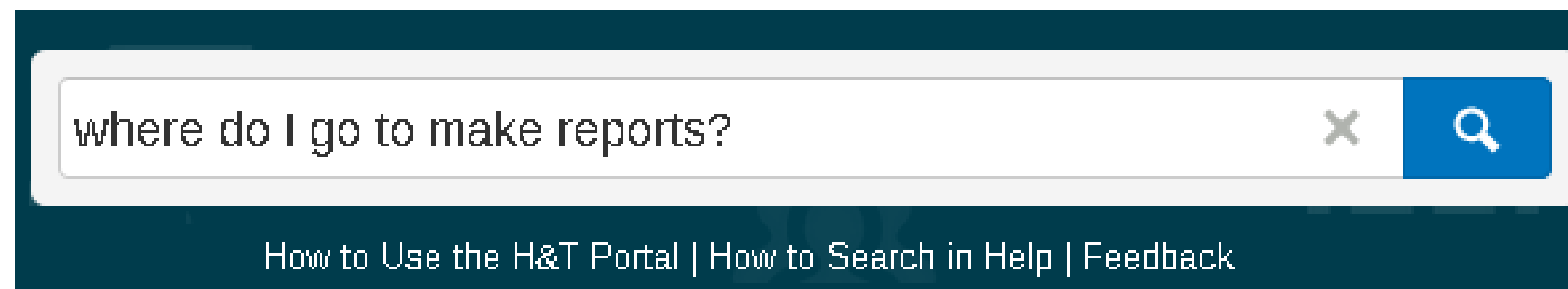
Keep in mind the following points about Help:

- A Help Link is located on the top right of the page. This link takes you to the Search bar in the Help & Training tab of the Success Community.
- Once your topic is entered and you click Search, you will see a row of tabs at the top of the search results page.
- These tabs allow you to further search your topic from various sources.

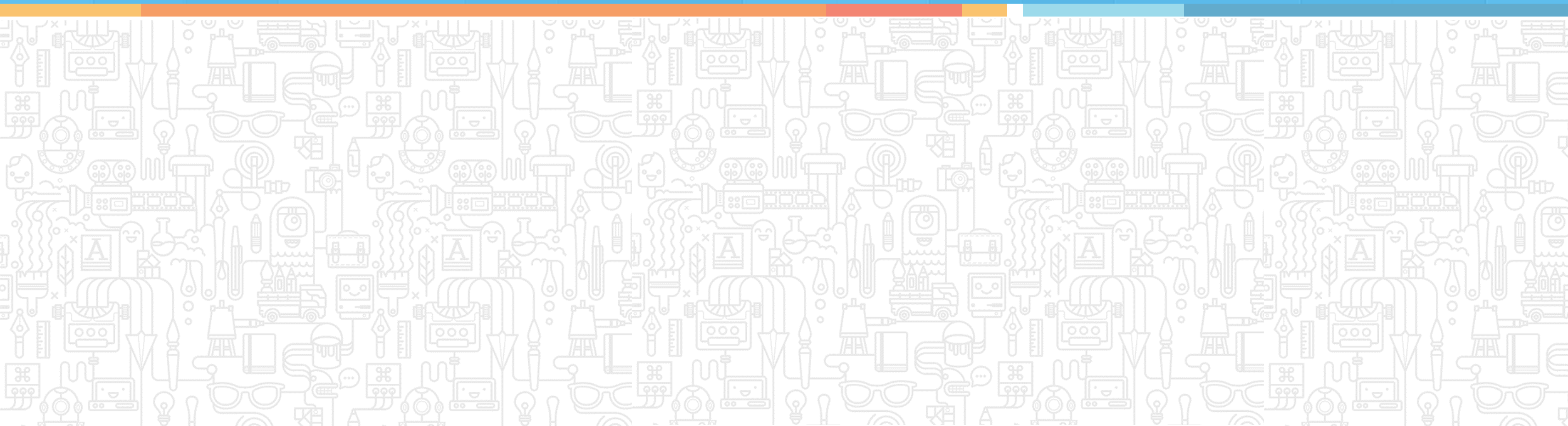


Keep in mind the following points about different tabs:

- The Answers tab gives information from the SF community.
- The App Exchange tab shows available apps related to your topic.
- The Articles tab shows articles written and maintained by Salesforce.
- The Developers tab gives answers from developers who have first hand knowledge about your topic.



Contacting Support



Remember the following about Support:

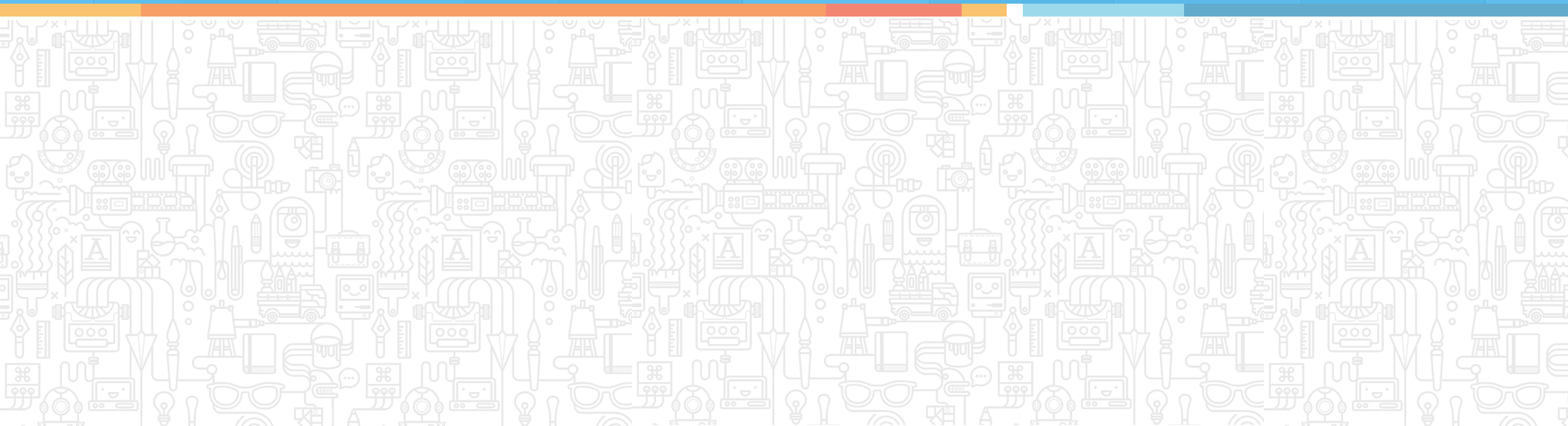
- Every Sales Cloud customer gets the Standard Success Plan, which includes basic training to get you started.
- The Standard Plan also offers online case submission with a 2-business day response.
- You have access to community-based best practices and Web-based support to help solve technical issues.
- Your organization can upgrade to a Standard and Success Plan, Premier Success Plan, or a Premier and Success Plan.

Help Finder

- The Help Finder brings form selections into a simple flow that provides relevant answers for a speedy resolution. By providing your topic and category we will be able to quickly route you to a capable support agent. Select a question to quickly find solutions for your support need. If you can't find your answer, just choose the support option you prefer and we will take your prior selections and pre-populate everything we can.

[CONTACT US](#)

Trust Site



Keep the following points in mind when using

www.trust.salesforce.com:

- ***Trust.salesforce.com*** is the Salesforce community's home for real-time information on system performance and security.
- You can find live and recent system performance data.
- You can get up-to-the-minute information on planned maintenance.
- You can identify Phishing, malicious software, and social engineering threats.

Success is built on trust.
Trust starts with transparency.

Trust.salesforce.com is the Salesforce community's home for real-time information on system performance and security.

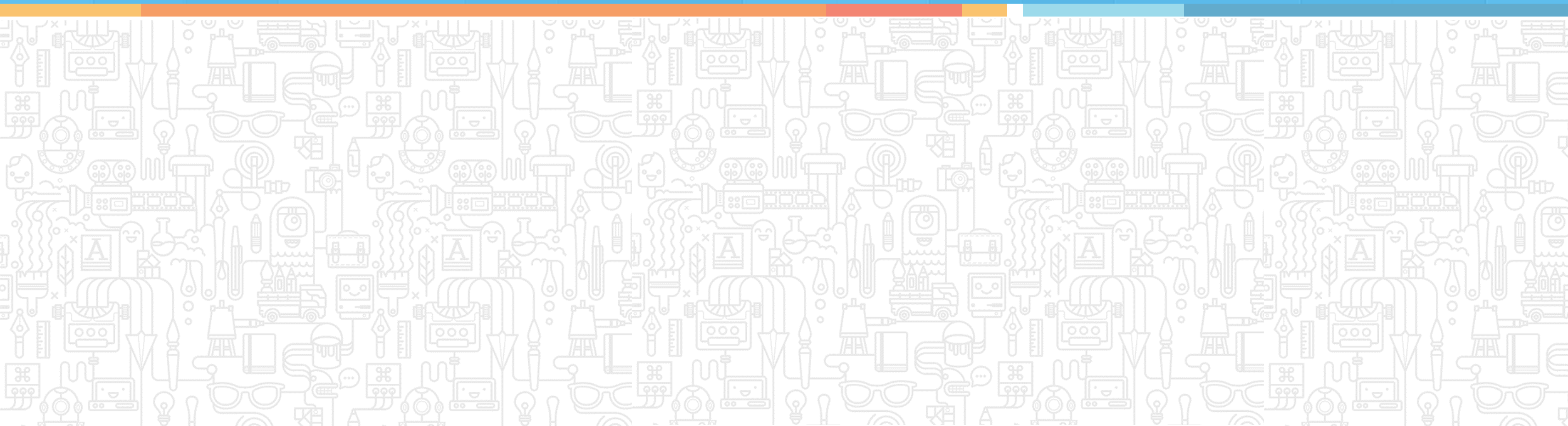
Keep the following points in mind when using trust.salesforce.com:

- The **Status tab** shows problems, which affected the salesforce.com website, that were resolved.
- The **Calendar tab** shows the upcoming Maintenance schedule.
- The **Performance tab** shows Transaction Count.
- The **Security tab** gives information and examples of recent security threats.
- The **Learn tab** gives information on security and how to best protect your organization.

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Known Issues



Keep in mind the following points:

- The Salesforce Known Issues Site exists to enhance trust and customer success by providing visibility into Known salesforce.com Issues.
- Salesforce Customer Support and Engineering publishes known issues based on the number of customer reports, the severity of the issue, and the availability of a workaround.

Known Issues

Status ▴

Any Status

In Review (640)

Scheduled (55)

Release In Progress (84)

Fixed (128)

No Fix (93)

The main status of known issues are:

- **In Review** - Requires review by engineering management.
- **Scheduled** - A patch release within the next 1-2 weeks.
- **Release in Progress** - The issue is fixed on some of the salesforce.com instances.

Known Issues

Status ▴

Any Status

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Scheduled (55)

Release In Progress (84)

Fixed (128)

No Fix (93)



QUIZ

1

If a user posts a question in “Answers,” where does the reply come from?

- a. Salesforce Technical Support
- b. A User in their Organization
- c. Community Members
- d. An Employee hired to answer questions



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The correct answer is **c**.

Answers is a feature of the Community application that enables users to ask questions and have community members post replies.

QUIZ 2

What is the purpose of the Idea Exchange?

- a. Develop New Products
- b. A forum to show off your skills
- c. A Complaint Department
- d. A place to submit suggestions and vote on product enhancements



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The correct answer is **d**.

The purpose of the Idea Exchange is to provide users a place to submit suggestions and vote on product enhancements.

QUIZ 3

Which of the following statement is true about Help and Training?

- a. You can filter search results by content type, topics, and language.
- b. The articles tab shows articles written by Salesforce users.
- c. There is a link in the More tab to Twitter.
- d. The answers tab has developers that answer the questions.



QUIZ 3

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- c. There is a link in the More tab to Twitter.
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The correct answer is **a**.

You can filter your results by content type, topics, and language in Help and Training.

QUIZ 4

Which of the following statements about Technical Support is true?

- a. Every customer gets the Standard Success Plan.
- b. You can call Salesforce for technical support 24-7.
- c. You can submit a case online to ask for help.
- d. You hear back instantly from online case submissions.



QUIZ 4

Which of the following statements about Technical Support is true?

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- b. You can call Salesforce for technical support 24-7.
- c. You can submit a case online to ask for help.
- d. You hear back instantly from online case submissions.



The correct answer is **c**.

You can submit a case online to ask for help with the Standard Success Plan.

QUIZ 5

What information can be found at trust.salesforce.com?

- a. Information on the status of Salesforce instances
- b. Information on the status of Email
- c. Information on the status of integrations
- d. Information on the status of the website



QUIZ 5

What information can be found at trust.salesforce.com?

- a. Information on the status of Salesforce instances
- b. Information on the status of Email
- c. Information on the status of integrations
- d. Information on the status of the website



The correct answer is **a**.

Trust.salesforce.com provides an online method of viewing the status of all Salesforce instances.



Case Study

Scenario

Analysis

Solution

United Containers is having trouble creating a report that shows closing rate of sales representatives by territory, for the last fiscal quarter. They've searched online for a solution, but are unable to find one. United Containers needs the ability to view this report for the upcoming company sales meeting.

Scenario

Analysis

Solution

United Containers decided to log a case with Technical Support for the following reasons:

1. Case submission can be performed online, which saves time.
2. Case statuses can be viewed in real-time.
3. Case comments and supporting files can be uploaded to the Case record.

Scenario Analysis Solution

The System Administrator of United Containers took the following steps to log a case:

1. Logged into Salesforce, clicked Help and Training.
2. Navigated to the Contact Us area to submit a case.
3. Typed the details of the report desired.
4. Uploaded a sample report, and submitted the case.

Key Takeaways

- Salesforce Support offers technical advice and support.
- Salesforce offers a myriad of self-help options.
- Basic support requires online form submission.
- Paid support allows for phone and online submissions.



This concludes 'Help and Training.'

The next lesson is 'Other Important Concepts.'