

Salesforce Certified Admin and App Builder

Lesson 12—Chatter



What You'll Learn

- Chatter Configuration
- Salesforce to Salesforce Configuration
- Sharing Records via Salesforce to Salesforce
- Ideas and Libraries Configuration
- Salesforce 1 Configuration



Chatter Overview

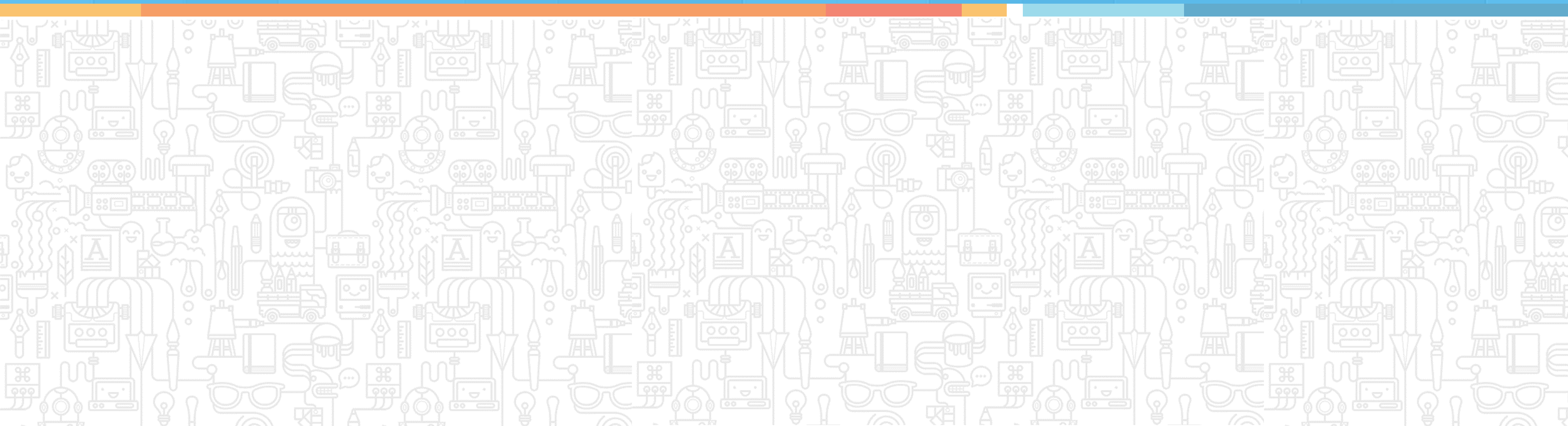


Following are the facts about Chatter:

- Chatter is a Salesforce application that enables users to connect and report activities within their company.
- Every organization has 5,000 Free Chatter Licenses.
- In Chatter, every user has a profile page with a photo and work related information.
- People can follow each other, form groups, follow records, and tasks in Chatter.
- Chatter provides instant chat, messaging, and record sharing.



Enabling Chatter



Keep the following points in mind when enabling Chatter:

- If your organization wants to use Chatter, it will be enabled for all users.
- It cannot be added to select groups.
- Enabling Chatter will also enable Global Search.

Chatter Settings

Turn on Chatter and Global Search features. the header. [Learn More...](#)

Enable



Groups

Modify Chatter group settings.

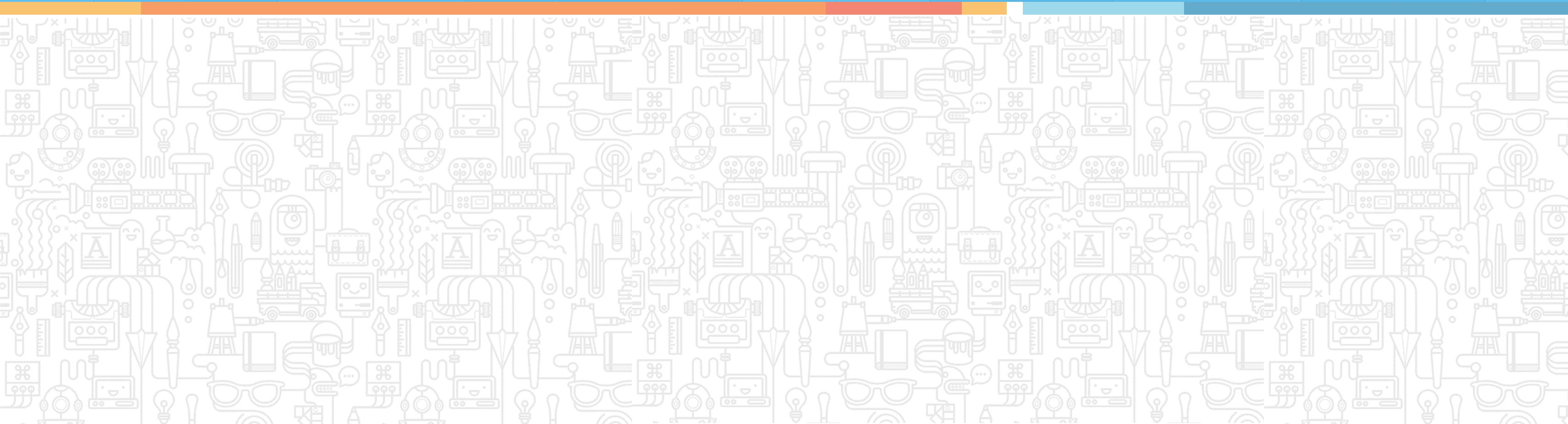
Allow Group Archiving



Allow Records in Groups



Enabling Chatter Feeds on Records



Keep the following points in mind when enabling Chatter Feeds on records:

- Users can enable feed tracking for objects and records.
- Users can see updates for the objects and records they follow in their Chatter feed.
- Many objects and fields are tracked by default.
- Feed tracking can be customized to include or exclude fields.

Fields in accounts

<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	<input checked="" type="checkbox"/> Enable Feed Tracking
You can select up to 20 fields.		
Account Name	<input checked="" type="checkbox"/>	
Account Owner	<input checked="" type="checkbox"/>	
Account Site	<input type="checkbox"/>	
Annual Revenue	<input type="checkbox"/>	
Company Email	<input type="checkbox"/>	

Configuring Chatter Groups



Keep the following points in mind when configuring Chatter Groups:

- Chatter groups are the main area in Chatter where people share information, post updates, and ask questions.
- Configuration can add features for archiving, unlisted groups, and records in groups.

Groups

Modify Chatter group settings.

Allow Group Archiving



Allow Records in Groups



Enable Unlisted Groups



Creating Customer Groups



Keep the following points in mind when creating Customer Groups:

- Users can invite customers to groups that they own and manage.
- Customers can see information only in groups they are invited to and can interact only with members of those groups.

Group Access

- | | |
|---|---|
| <input checked="" type="radio"/> Public | Everyone can see updates and join. |
| <input type="radio"/> Private | Only members can see updates. Membership requires approval. i |
| <input type="radio"/> Unlisted | Group is hidden from lists, feeds, and search. |
| <input type="checkbox"/> Allow Customers | You can invite customers to this group. i |

Creating a Free Customer Chatter User



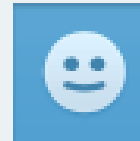
Keep the following points in mind when creating a free customer Chatter user:

- The Chatter Free license is for users who don't have Salesforce licenses.
- Chatter Free can access items such as people, profiles, groups, and files, but they can't access any Salesforce objects or data.
- Chatter Free users cannot see tabs.
- They can be a Chatter moderator.

Message

Justin at Cloud Creations, Inc. invited you to join the Chatter group Sample Group. Join to access the group's updates and files, and collaborate with other group members.

Justin Davis says:



Welcome to the Customer Group!

Send

Cancel

Customizing Chatter Email Notifications



Keep the following points in mind when customizing Chatter email notifications:

- Chatter email notifications can be customized to show the sender information and the company logo in the footer.
- Email settings can be configured on a personal or group basis.

Follows

Follows me



Posts or Likes

Posts on my profile



Shares a post I made



Likes a post or a comment I made



Configuring Salesforce to Salesforce



Keep the following points in mind when configuring Salesforce to Salesforce:

- Salesforce to Salesforce enables businesses to share records.
- You have 100% visibility into your partner activity.
- You can manage both internal and channel sales in one place.

Salesforce to Salesforce Setup

Salesforce to Salesforce lets you share records with business partners that use Salesforce. Click Edit to customize your Salesforce to Salesforce settings.

Edit

Salesforce to Salesforce Settings

Enable

☐

Accepting a Salesforce Connection



Keep the following points in mind when accepting a Salesforce connection:

- From the Connections tab, you can view connection details and manage connections.
- The connection details include information on the status of the connection, the owner of the connection, information about the company, published and subscribed fields, and a connection history.
- To view a Connection, click on the **Connections tab**.
- On the Connections subtab, click the name of the connection you want to view.

New Invitation

Save & Send Invite

Cancel

Connect to...

Contact

Justin Davis

Account

Our company is represented by...

Connection Owner

Justin Davis

Sharing an Account via Salesforce to Salesforce



Keep the following points in mind when sharing an account via Salesforce to Salesforce:

- Once you have connected to another organization, you can share data with them.
- The connected organization does not have direct access to your records.
- They have a connected record in their organization.
- Any updates on one record is shown on the other.
- You can share records with one or more connections.
- You select the type of records you share by selecting the objects and fields to publish.

Account Detail

Edit Delete Sharing

Account Name	Computer Lab International, Inc.
Market	Corporate
Employees	
Company Email	

Enabling Ideas



Keep the following points in mind when enabling Ideas:

- Ideas provide an internal forum for posting product ideas and improvements.
- Users post, vote for, and discuss ideas.
- Ideas are typically used for long term projects or feature requests.

Save

Cancel

Enable Ideas	<input checked="" type="checkbox"/>	i
Enable Text-Formatting, Images and Links	<input checked="" type="checkbox"/>	i
Enable Categories	<input checked="" type="checkbox"/>	i
Enable Reputation	<input type="checkbox"/>	i
Ideas User Profile	<div>Chatter profile</div>	i
Half-Life (in Days)	<div>2.00</div>	i

Configuring Ideas Themes



Keep the following points in mind when configuring idea themes:

- A company can set up idea themes to encourage input on specific topics.
- You can create an idea theme, add pictures, videos, and other multimedia content to showcase or explain the idea that you're presenting to users.
- You can ask for help with problem solving or innovation.
- You can also view and manage the list of ideas that have been posted to the idea theme.

Idea Themes Settings

Turn on Idea Themes for your organization.

Enable Idea Themes



Enabling Social Accounts



Keep the following points in mind when enabling Social Accounts:

- You can enable or disable Social Accounts, contacts, and leads for your organization.
- Any organization created after the Spring '12 release has social networks enabled by default.
- You can view Twitter, Facebook, Klout, or YouTube profile data.
- You must be logged in to each social media account to use this feature.

Social Accounts, Contacts, and Leads Settings

Turn on Social Accounts, Contacts, and Leads for your organization.

☒ Enable Social Accounts, Contacts, and Leads

Social Networks

Select the social networks that your organization may access.

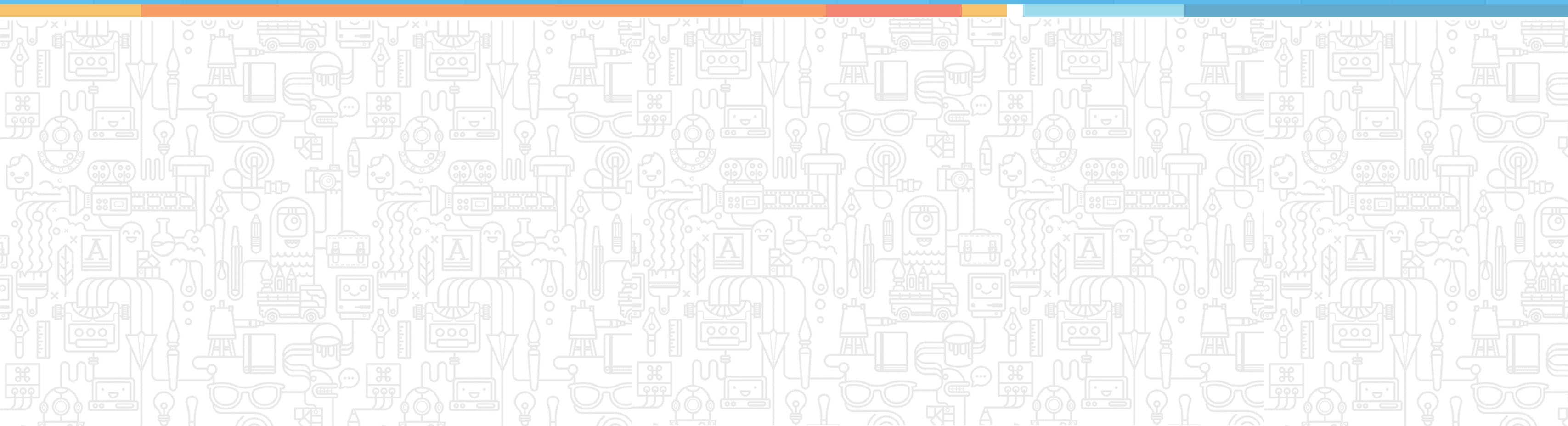
☒ Enable Twitter [i](#)

☒ Enable Facebook [i](#)

☒ Enable Klout [i](#)

☒ Enable YouTube [i](#)

Enabling Libraries and Content

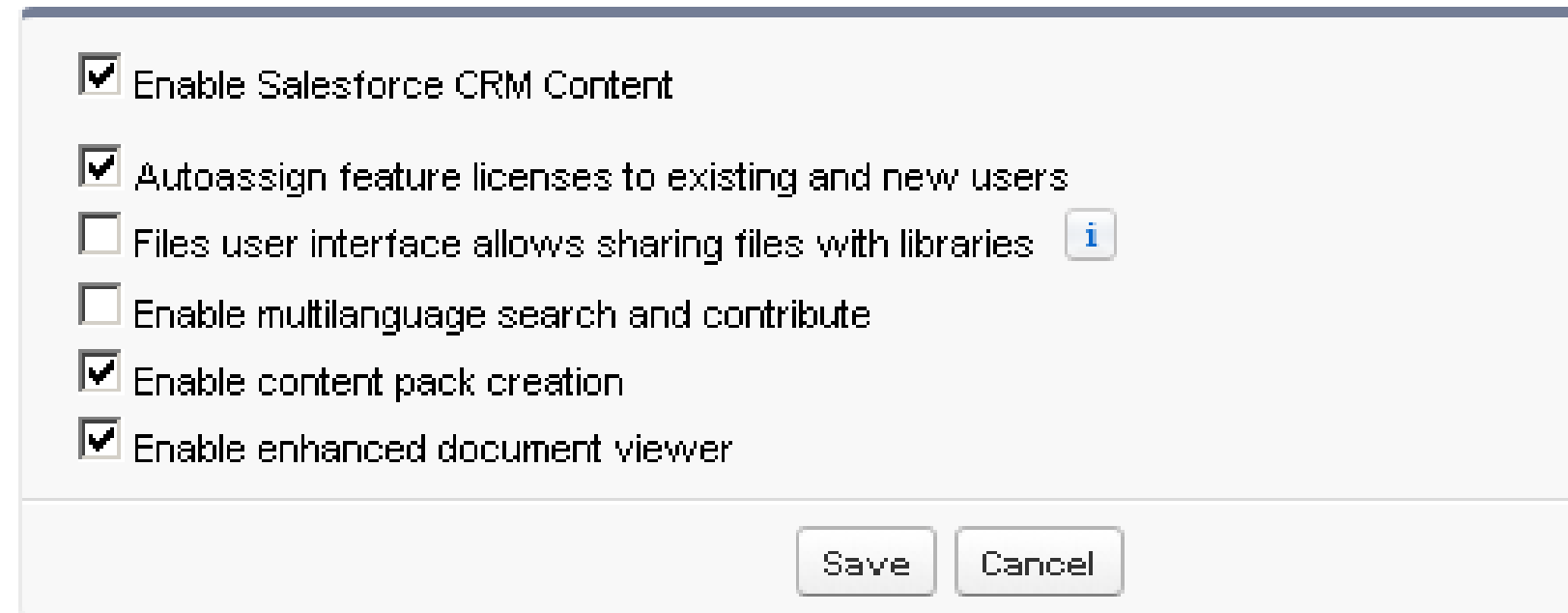


Keep the following points in mind when enabling Libraries and Content:

- Salesforce CRM Content allows you to enable the use of content libraries in your organization.
- Content uses libraries to collect documents into categories.
- With Content you can organize, share, and search digital content.
- Search libraries to find content.
- Content is available in all editions of Salesforce.

Salesforce CRM Content

Use this page to modify Salesforce CRM Content settings for your organization.

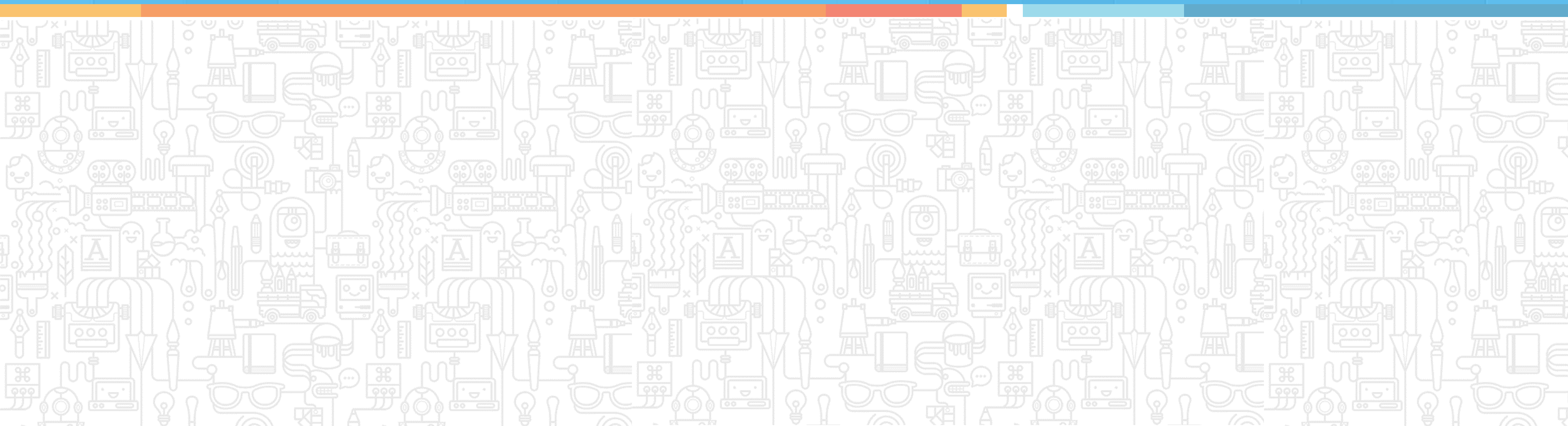


The screenshot shows the Salesforce CRM Content settings page. It features a list of six settings, each with a checkbox. The first five settings are checked, while the third one is unchecked. To the right of the third setting is a blue information icon. At the bottom right of the settings area are two buttons: 'Save' and 'Cancel'.

<input checked="" type="checkbox"/>	Enable Salesforce CRM Content
<input checked="" type="checkbox"/>	Autoassign feature licenses to existing and new users
<input type="checkbox"/>	Files user interface allows sharing files with libraries i
<input type="checkbox"/>	Enable multilanguage search and contribute
<input checked="" type="checkbox"/>	Enable content pack creation
<input checked="" type="checkbox"/>	Enable enhanced document viewer

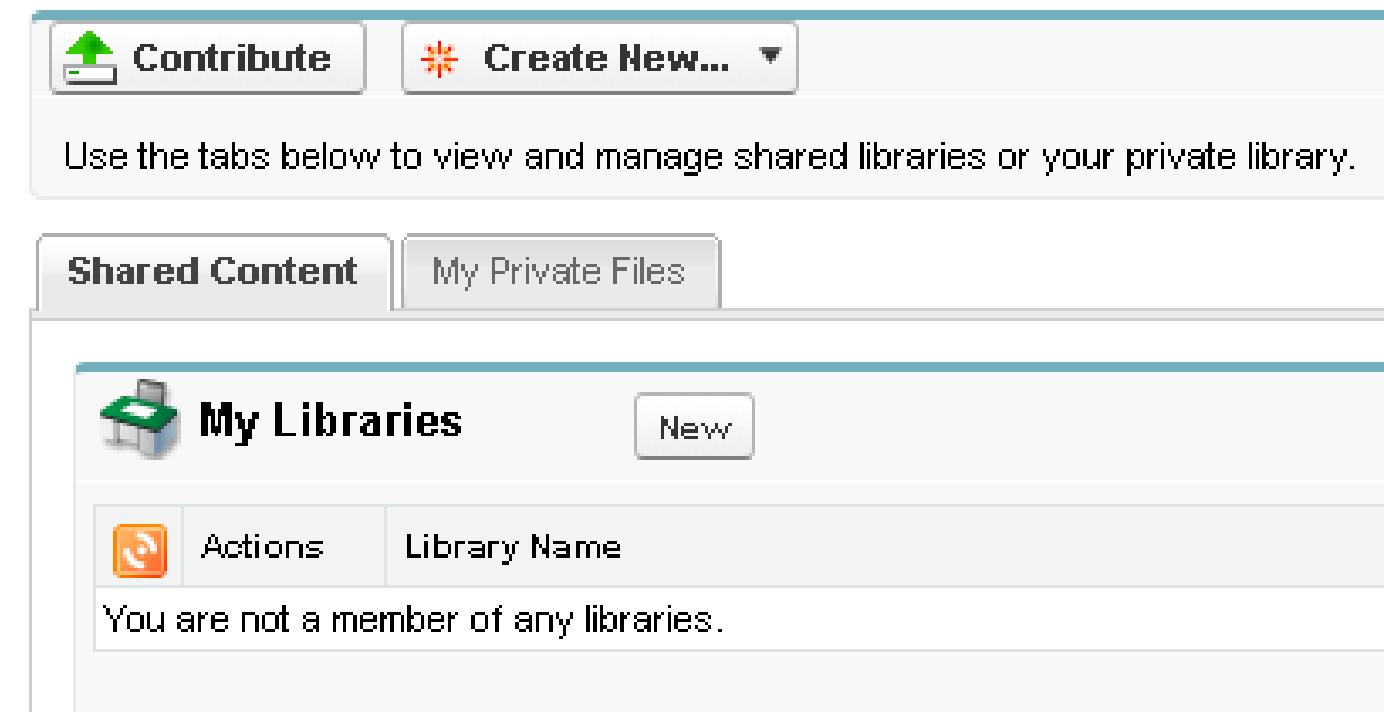
Save Cancel

Customizing Libraries and Content



Keep the following points in mind when customizing Libraries and Content:

- Content records have custom fields and validation rules.
- You can use custom fields to create a relationship between Content objects and other objects.
- You can create, edit, or delete custom content fields.
- Custom fields allow users to categorize and define content during the publishing process.
- You can create, edit, or delete validation rules.



Uploading Documents to Libraries and Content



Keep the following points in mind when uploading documents to Libraries and Content:

- Publish files to libraries by uploading them from your computer.
- You can also share them from Chatter.
- Each organization can have up to 2000 libraries.

Contribute Content

Choose a file to upload:

[Do you want to link to a website instead?](#)

Browse...

No file selected.

Cancel

Configuring Salesforce1



A few facts of Salesforce 1 are listed here:

- ***Salesforce1*** is the new mobile interface.
- It's used to access Salesforce on mobile devices.
- A mobile user can access all standard and custom objects.
- The mobile app is automatically enabled for all new and existing instances of Salesforce.

Available Items



Feed



Dashboards



Smart Search
Items



People





QUIZ

1

Where can Chatter be used?

- a. YouTube
- b. Salesforce
- c. Twitter
- d. Facebook



QUIZ

1

Where can Chatter be used?

- a. YouTube
- b. Salesforce
- c. Twitter
- d. Facebook



The correct answer is **b**.

Chatter is used exclusively in Salesforce.

QUIZ 2

What invitations can users send from Chatter?

- a. Technical Support Access
- b. Competitor and Partner Access
- c. Customer Service Access
- d. Customers and Co-Worker Access



QUIZ 2

What invitations can users send from Chatter?

- a. Technical Support Access
- b. Competitor and Partner Access
- c. Customer Service Access
- d. Customers and Co-Worker Access



The correct answer is **d**.

Users can send invitations to customers and co-workers through Chatter.

QUIZ 3

What are idea themes used for?

- a. Uploading documents
- b. Posting email messages
- c. Displaying feature requests
- d. Posting and discussing various internal issues.



QUIZ 3

What are idea themes used for?

- a. Uploading documents
- b. Posting email messages
- c. Displaying feature requests
- d. Posting and discussing various internal issues



The correct answer is **d**.

Idea themes are used to post internal ideas and topics.

QUIZ 4

Which of the following is true about Content?

- a. Content is shared through Chatter
- b. Libraries is the same thing as content
- c. Content is only available in Enterprise edition and higher
- d. Content is used to organize, share, and search digital content



QUIZ 4

Which of the following is true about Content?

- a. Content is shared through Chatter
- b. Libraries is the same thing as content
- c. Content is only available in Enterprise edition and higher
- d. Content is used to organize, share, and search digital content



The correct answer is **d**.

Content is used to organize, share, and search digital content.

QUIZ 5

Which of the following is true about Salesforce to Salesforce?

- a. A Salesforce customer can voluntarily connect to another org
- b. Any standard user can initiate or accept a connection
- c. All data is instantly integrated
- d. Another Salesforce customer can connect with your org without permission



QUIZ 5

Which of the following is true about Salesforce to Salesforce?

- a. A Salesforce customer can voluntarily connect to another org
- b. Any standard user can initiate or accept a connection
- c. All data is instantly integrated
- d. Another Salesforce customer can connect with your org without permission



The correct answer is **a**.

A Salesforce customer can voluntarily connect to another org.



Case Study

Scenario Analysis Solution

United Containers is struggling with internal communications between its various teams and departments, which are not located in the same building. Emails are lost and messages aren't communicated. Files and attachments aren't disseminated to the appropriate team members as email distribution lists are out of date.

Scenario Analysis Solution

United Containers decided to implement Chatter in Salesforce for the following reasons:

1. Chatter can be used for both direct and instant messages.
2. Media such as files and videos can be posted directly to the Chatter feed.
3. Groups can be created to organize discussions based on topics.

Scenario Analysis Solution

United Containers took the following steps to solve these challenges:

1. Enabled Chatter in Salesforce.
2. Adjusted email notification.
3. Created product ideas group to organize posts around the topic.

- Chatter is an excellent collaboration tool that offers multiple features.
- Groups can be created for topic-based discussions.
- Chatter licenses can be given to users outside the organization.



This concludes 'Chatter.'

The next Lesson is 'Reports.'