**Salesforce Knowledge Base**

**Introduction**

Welcome to theSalesforce Knowledge Base! This site brings together training materials and program documentation that has previously lived in multiple, scattered locations to allow you to quickly find the intent, definition, and use of each field in the Access UI.

Each page includes an overview, a blurb on each field, and FAQ. If you have additional questions, feedback, or if anything is unclear, please post in the "Access User Interface Questions and Feedback" channel on Teams.

[**Meetings Overview**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Meetings.aspx)

[**Tasks Overview**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx)

[**Schedule of Automated Tasks**](https://tbl500amory-my.sharepoint.com/:b:/g/personal/mbarton_bottomline_org/ETP9x1-eVGhDkZYVa9KYruoB3D6iByEuafku87JwFr6KNg?e=pKtaQW)

[**Employability Milestones**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Employability-Milestones.aspx)

[**Financial Aid Task Management**](https://tbl500amory-my.sharepoint.com/:b:/g/personal/mbarton_bottomline_org/EThR76PdZcpJlSN4oJwjP1QBF4Kr9F4vV7mDQ-PtrXOboA?e=q62S16)

**Meetings**

A meeting is a synchronous voice-to-voice or face-to-face interaction where the advisor is providing value-add to the student.

* Examples: A call where the sole purpose is to set up a time to meet is not a meeting. A call where the advisor and student troubleshoot a hold on the student’s account is a meeting.
* Unlike in the old UI, a meeting does **not**need to be associated with one or more tasks in order to be defined as a meeting
* *Program Events that help students make progress toward milestones also count as a meeting; the Program Leadership team is working on a better way to track these in Salesforce!*

**Tasks**

Tasks are things a student and/or advisor can accomplish on the way to achieving a program outcome. These may happen during or outside of a meeting, with or without Bottom Line's support. The tasks list may include:

* A service that is required of students at a particular time (e.g. 1st Year Sept Check-In, Senior Year Kick-Off)
* A reminder to touch base on/log a critical data point (e.g. course registration)
* A milestone that cannot be measured by other critical data being captured (e.g. E Milestones)
* Other work/tasks you need to keep track of to help students meet milestones (e.g. submit verification paperwork, register for 2 more classes, review resume, etc.)

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**[Program Record](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Record.aspx" \t "_self)**