Session 7

Introduction to Chatter

- Chatter is a Salesforce real-time collaboration application that lets your users work together, talk to each other, and share information.

- Chatter connects, engages, and motivates users to work efficiently across the organization, regardless of role or location.

- You can use chatter in your browser or other mobile device.

- Chatter helps you learn more about your coworkers and gives you an easy way to get in touch with them.

- You can follow people, groups, topics, files, and records, like opportunities and accounts. When you follow people, you see their posts, comments, and likes in your What I Follow feed.

- People can follow each other independent of their teams, which helps collaboration across functional borders.

- When you follow files, topics, and records, you are notified when they change.

- If your organization wants to use chatter, it will be enables for all users.
- It cannot be added to selected groups.
- Enabling chatter will also enable global search.

- You should enable chatter from chatter settings.

Eabling 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 chatter feed.

Introduction to Groups

Chatter groups make collaboration easier, take project management to another level, and provide a great way for teams to keep up.

Groups are the main collaboration space in Chatter. Groups are where people organize around a shared interest, purpose, or goal. People use groups to share information, post updates, and ask questions.

Salesforce provides various group types for different purposes and audiences.

- **Public groups** are visible and open to all employees. Anyone in the company can join a public group and post, comment, and add files to it.
- **Private groups** are open only to group members. People must request to join a private group. Only group members can post, comment, and add files. Nonmembers can see the group's picture and description, but they can't see the group feed or files.
- **Unlisted groups** are invitation-only and don't appear in list views and search results. An unlisted group is hidden from everyone except group members. Only the group's owner or manager can invite people to join an unlisted group.
- **Broadcast only** groups allow only group owners and managers to create posts. Group members can comment on

them. You can apply the **Broadcast Only** option to private, unlisted, and public groups.

Introducing Notifications

If they use Salesforce on their mobile device, users can get notifications
when certain events happen, such as when they receive approval requests or when someone mentions
them in Chatter.
These types of notifications can appear to Salesforce app users.
• In-app notifications keep users aware of relevant activity while they're using the Salesforce app. By
tapping , a user can view the 20 most recent notifications received within the last 90 days.

• Push notifications are alerts that appear on a mobile device when a user has installed the Salesforce for Android and Salesforce for iOS but isn't using it. These alerts can consist of text, icons, and sounds, depending on the device type. If an administrator enables push notifications for your organization, users can choose individually whether to receive push notifications on their devices

Enable Notifications

1. From Setup, enter Notifications in the Quick Find box, then select Salesforce
Notifications
2. Select the notifications that you want your Salesforce app users to receive.
3. If you're authorized to do so for your company, select Include full content in push notifications .
4. Click Save.
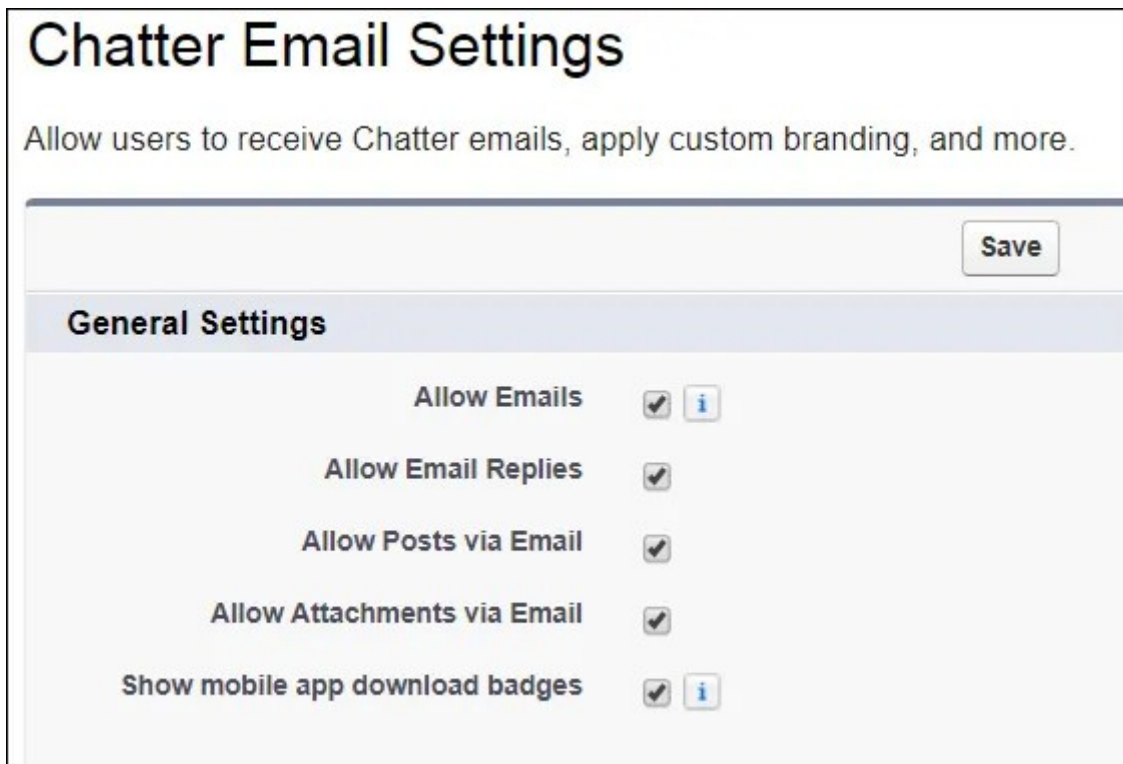
Enable Chatter Email Notifications

When you turn on email notifications for Chatter, users automatically receive emails about new posts, comments, and other changes.

Users can keep the default notifications you set up, or they can configure their own email settings. Users control

whether they want to receive emails, the changes they want to be notified about, and how often they're notified.

You enable email notifications for all users in Setup, on the Chatter Email Settings page.

1. In the Setup Quick Find box, enter Email Settings, then click **Email Settings**

Select

Allow Emails to turn on Chatter email notifications for all users.

Allow Email Replies to allow users to reply to email notifications about messages and comments via email instead of navigating to the comment or message in Chatter.

Allow Posts via Email to allow users to post to groups using email.

Allow Attachments via Email to allow users to include attachments in posts to groups using email.

Show mobile app download badges to add App Store and Google Play badges for the Salesforce for Android or iOS to all Chatter email notifications from your internal org. Use badges to help increase user adoption of the Salesforce mobile app.