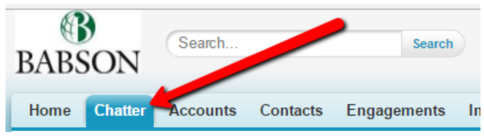
Chatter

Chatter is a collaboration tool for users to connect and share information in real-time using Chatter feeds. Chatter feeds show you recent activities performed by people and on records.



When to use chatter:

- To share/track progress or challenges with an account, contact, opportunity, offering or project.
- To actively build relationships
- To ask a question and give responses
- To get feedback
- To post and share documents (up to 2GB) instead of emailing attachments

What to put on your profile?

Upload a picture: Click your name and then click 'Upload Photo' in the left hand corner. Enter your contact information: Under your photo on your profile page, click the pencil icons to update your contact information and personal description.

Fill out "About me": Introduce yourself to your company, include your department, your areas of expertise, an overview of your job, and other professional details.

How to follow other Salesforce users:
Go to the People tab. Find the person's name you want to follow and click 'Follow'.

Know What You're Following
Chatter allows users to follow records and other users in their org. Following a record or a user provides you with real time updates about changes made to that record or that user's status directly in your chatter feed. Because the majority of your feed is populated with what you follow, it's important to be picky and only follow what is important and relevant to you. Your Chatter feed should be filled with posts made by executives, updates made to records you're working with, experts in your field that can provide you sound advice, and peers that you can collaborate with. Your chatter will be as valuable as you make it; use it wisely and enjoy the simplicity of a central feed for everything you care about.

How to follow records:
Go to the record you want to follow. Click the 'Follow' button

How to post information on records:

In the text box at the top of the home or profile page, type a short sentence or two.

Chatter Files

You can easily upload, store, find, and follow files using chatter. This includes files from Salesforce CRM Content. All file types, up to 2GB, are supported, including everything from Microsoft® PowerPoint presentations and Excel spreadsheets, to Adobe® PDFs, image files, audio files, and video files.

To attach a file from your computer to a post:

1. Enter your post in the field at the top of the feed. If you don't enter any text, a generic update is posted with your attachment.
2. Click File below your post.
3. Click Upload a file from your computer.
4. Click Browse and select a file. The file name populates automatically.
5. Optionally, change the Name of the file and add a Description. Or click to close the Attach a File window.
6. Click Share.

To attach a file from Salesforce to a post:

1. Enter your post in the field at the top of the feed. If you don't enter any text, a generic update is posted with your attachment.
2. Click File below your post.
3. Click Select a file from Salesforce.
4. Search for your file from the Select a File to Attach list, and click Attach. The file is attached to the feed, but not shared yet. Confirm this is the file you want to share by viewing the first page of the file, and clicking on the file to see a preview.
5. Optionally, click Change file to return to the Select a File to Attach list to attach a different file. Or click to close the Attach a File window.
6. Click Share.

Chatter Email Settings

Chatter can email you every time someone follows you, posts to your profile or groups, and more. You can also receive daily or weekly user and group email digests. User digests include the updates you see in your own Chatter feed, such as updates about the people, records, and files you follow and your groups. Group digests include the updates you see in a particular group's Chatter feed, and are configurable on a group-by-group basis.

1. In the upper right hand section of a Salesforce page, go to your user name and click on Setup from the picklist.
2. In the left hand panel go to Personal Setup -> My Chatter Settings and click on Chatter Email Settings.
3. On this page you can determine if you want to receive emails regarding chatter, including which types of chatter messages and how often you receive via email a digest of chatter messages.

Tips for Chatter Email Settings:

- When configuring your user and group digests, specify whether you want to receive each digest daily or weekly. Daily digests include the 25 latest posts from the previous day while weekly digests include the 50 latest posts from the week. Both include the three latest comments on each post. Alternatively, when configuring group digests, you can choose to receive an email every time someone posts to the group.

- Chatter sends daily digests at approximately 12:00 AM every day, and weekly digests at approximately 12:00 AM on Sunday. For user digests, the time is according to the user's time zone. For group digests the time is according to the organization's time zone.

- If you configure Chatter to send digests but you don't receive any, it's likely that the people and items you're following have no new updates.

- Whenever you join or are added to a group, you don't receive email notifications initially because they're turned off by default. You can use Set default frequency for groups I join: to choose how often you want to receive emails when joining new groups. Changing the default frequency doesn't affect the groups you already belong to.