Pfollowup {

[The follow up process for phone calls]

< Here is where your knowledge begins >

}

Table Of ‘Contents’ {

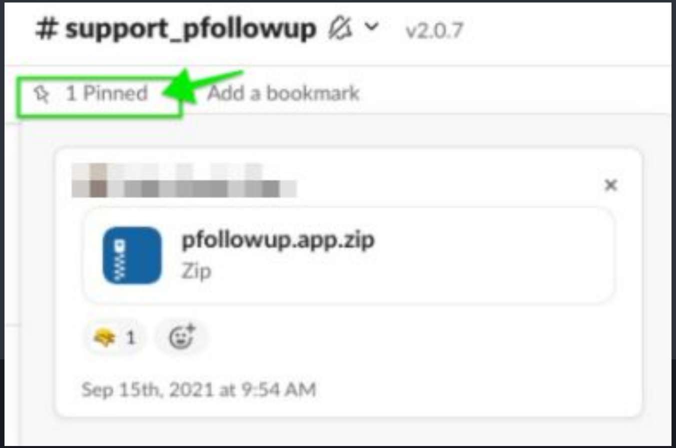
}

Adding Pfollowup {

[Download the zip file for Pfollowup]

< Go to #support_pfollowup, click on ‘Pinned’, click on pfollowup.app.zip to download the file >

}

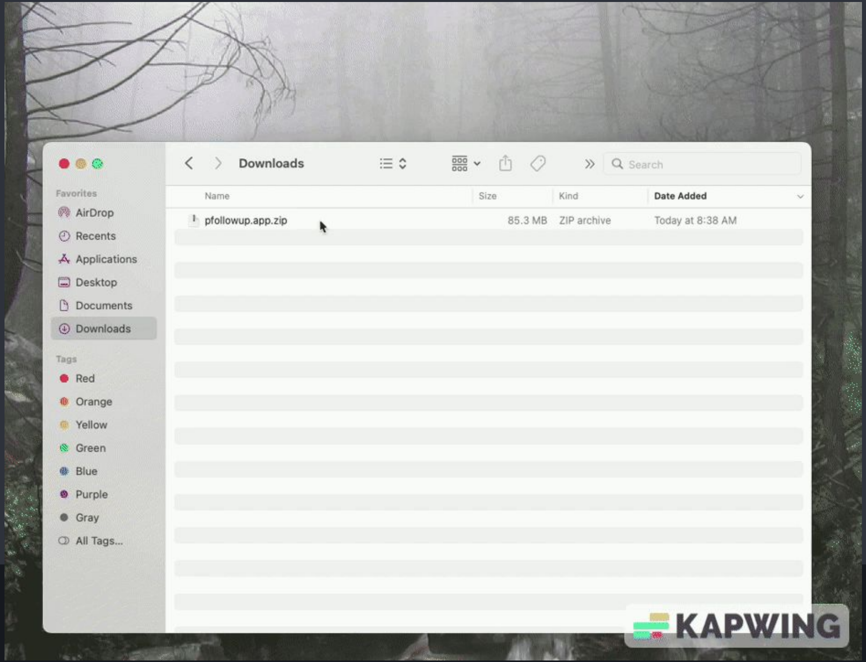


Opening Pfollowup < /1 > {

< Open Finder on your computer and move the file from “Downloads” to “Applications” >

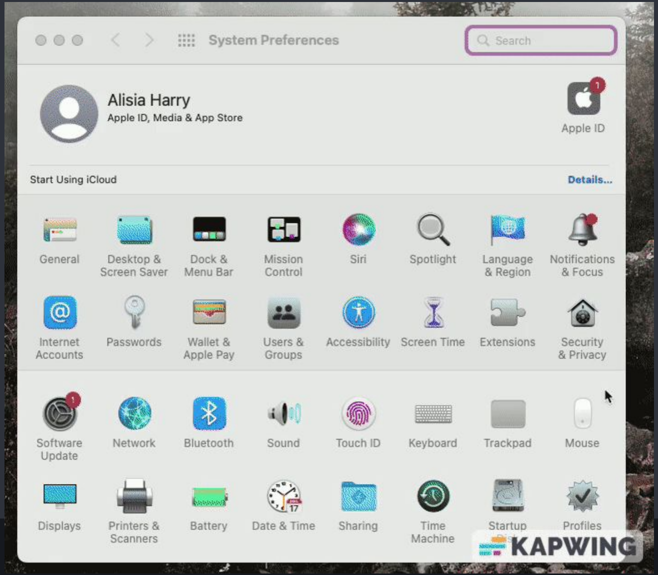
< Go into “Applications”and unzip the file by double clicking on it. Open the unzipped file and click “cancel” when given the option to “trash or cancel” the file >

}



Opening Pfollowup < /2 > {

< Go to “System preferences”, click “Security and Privacy”, click “General”, click on the padlock to unlock your preferences, and then click “Open anyways” >



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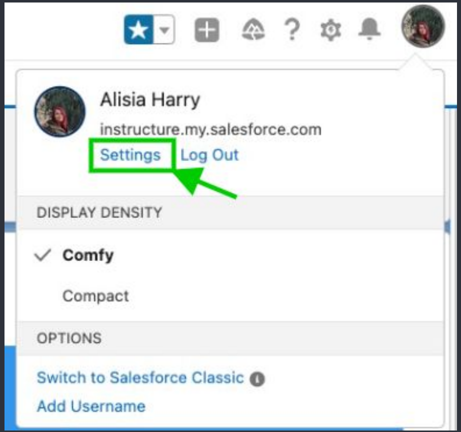
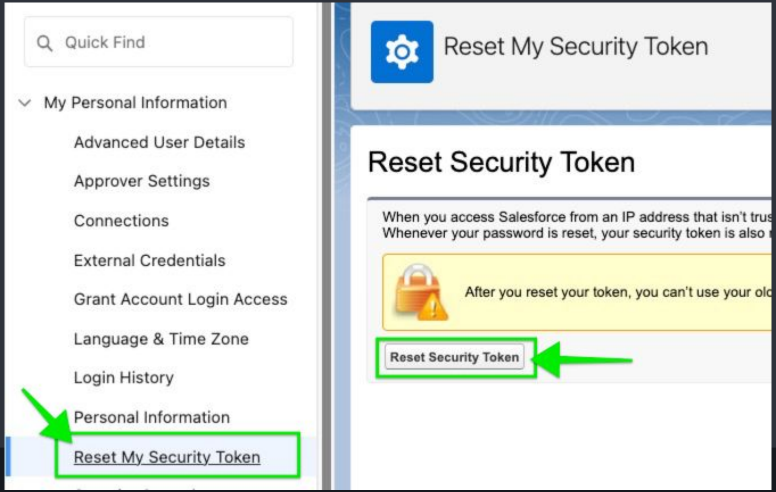
Opening Pfollowup < /3 > {

Security Token

< Go to Salesforce and click on you profile bubble in the top right corner. Click “Settings”, click “Reset My Security Token”, then click “Reset Security Token”. >





}

Opening Pfollowup < /4 > {

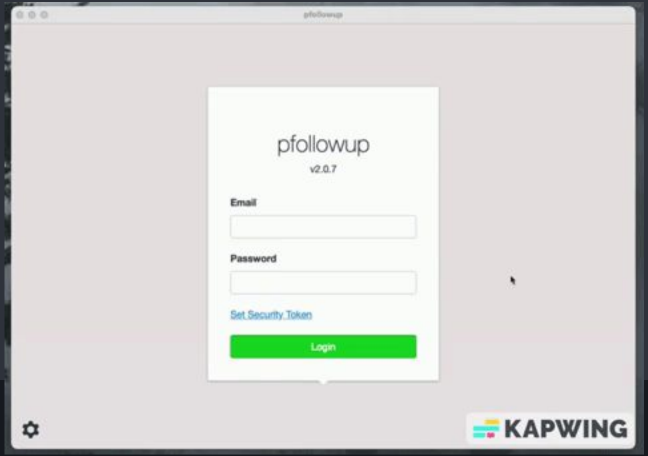
< After resetting your security token in Salesforce, you will want to go into your work email and look for an email with the subject line “Your new Salesforce security token”. Open up the email and copy your security token. >

}

Pfollowup ‘Signing In’ {

Step 01 Go to the Pfollowup login page.

Step 02 Click “Set Security Token”, and paste the security token you copied from your email, then click “Set Token”.



Note Your security token does **NOT** have to be reset every time you login to Pfollowup.

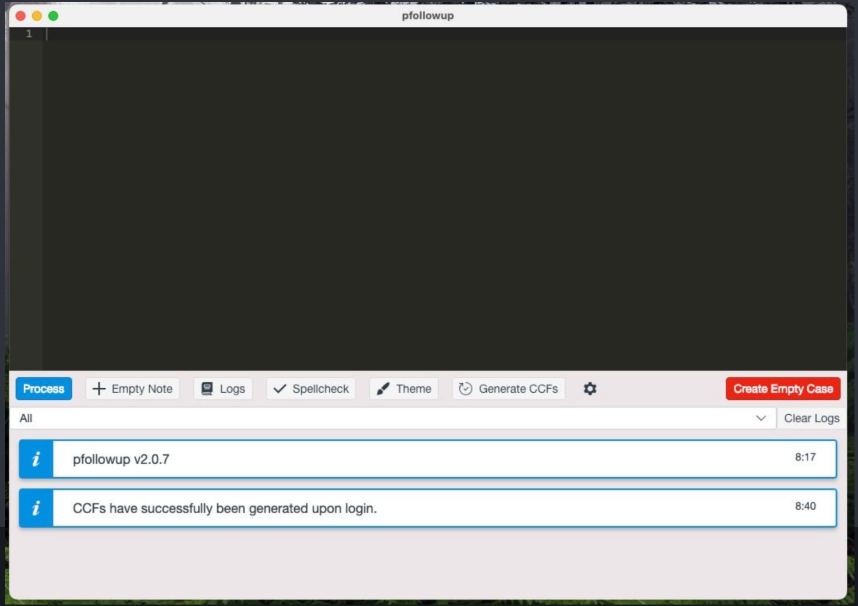
}

Pfollowup ‘Signing In’ {

Step 03 Enter in your username, it should be your full Instructure email. Then enter in your password, it should be the same as your Okta password.

Step 04 Click “Login”.

< You should be looking at the Pfollowup landing page as seen to the right >



}

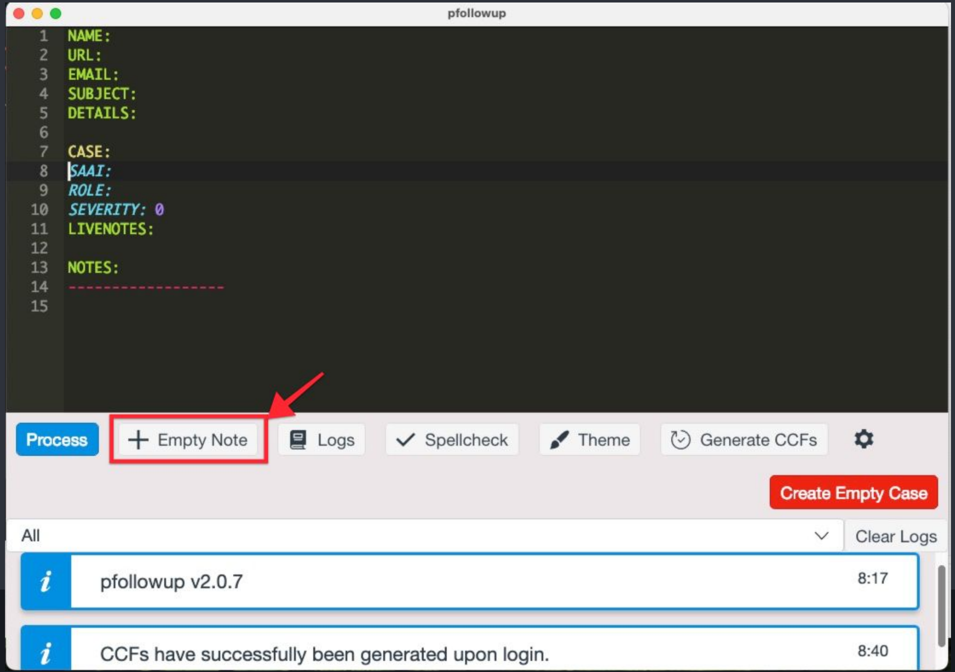
Using Pfollowup {

< We will be covering the options available to you when using Pfollowup, and what they do >

}

+Empty Note < /1> {

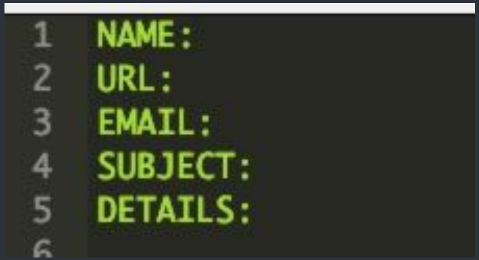
< Select “**+Empty Note**” to add a note section to fill out for your case >



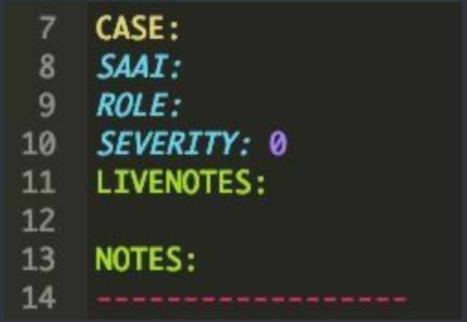
}

```
+Empty Note < /2> {

    < NAME: Input the full name of user here >
    < URL: Input relevant Canvas urls that you navigated to when
    helping the user >
    < EMAIL: Input the user's default email found on their Canvas user
    page >
    < SUBJECT: The subject line of the email >
    < DETAILS: The body of the email, be as specific as you can since
    we don’t have the communication to read back through like we would
    for emails/chats. Remember, the body of the email will start in the
    middle of a sentence. Pfollowup automatically input "You contacted
    Canvas Support today because", you will be completing the sentence
    after "because". >
}
```



+Empty Note < /2> {



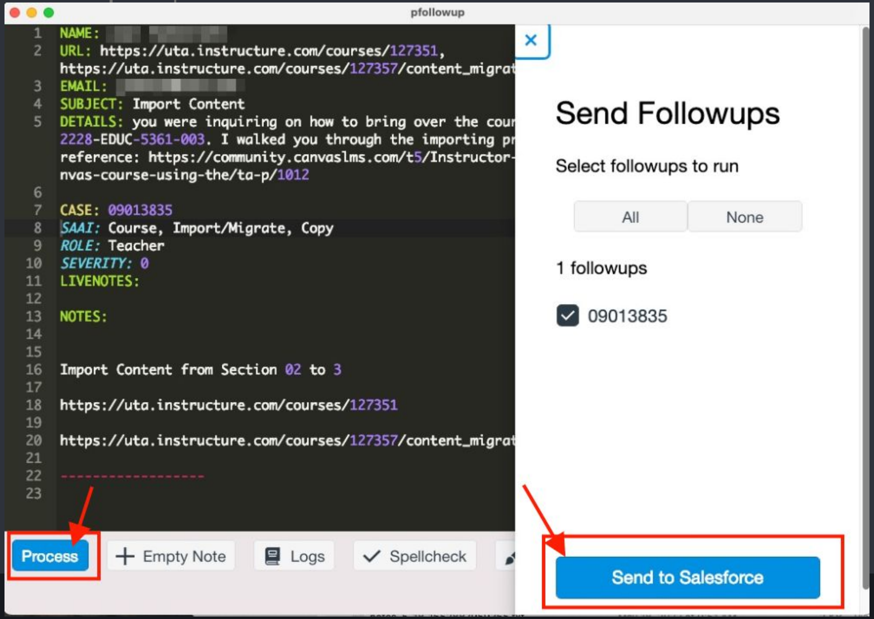
< CASE: Case number for your call >
< SAAI: The CCAs, start typing out keywords and options will populate that you can tab through to find the right CCA >
< ROLE: Role of user you were speaking with (Admin, Student, Teacher, etc… >
< SEVERITY: Will automatically be set to 0, you shouldn't have to change it >
< LIVENOTES: If you want to add a internal post to your case, you will add the internal note here >

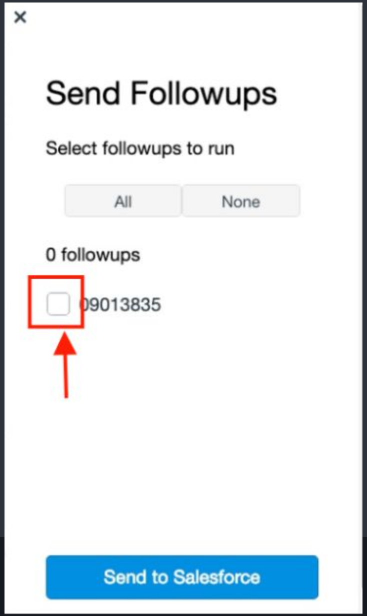
< NOTES: Where you can add notes while on the call to reference back to when filling out the details above. Notes added here will stay in Pfollowup, they don’t send to Salesforce. These are your personal notes on the case. >

}

Processing your ‘follow up’ {

< Click “**Process**” in the bottom left corner. This will pull up a tray to the right. Any cases with a checked box indicate they still need a follow up. Click “**Send to Salesforce**” to process the follow up(s) >



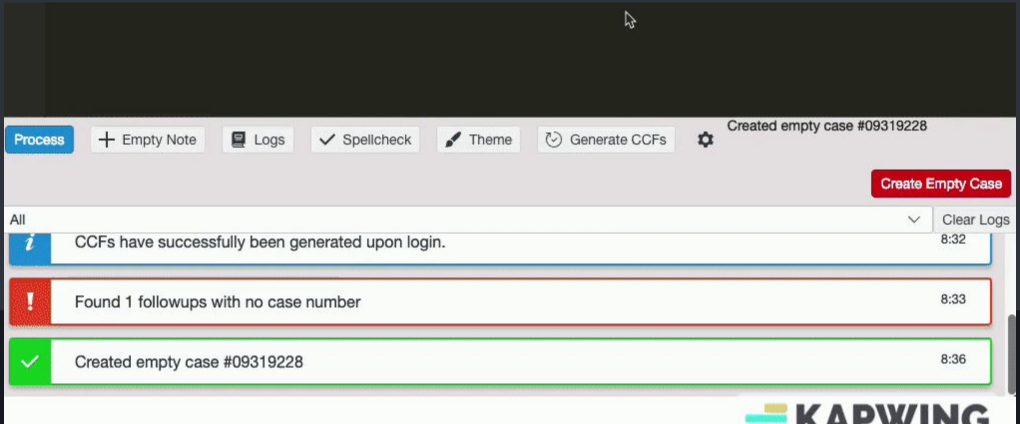


< A unchecked box indicates that the follow up has been processed >

Pfollowup ‘Logs’ {

< Click on ‘Logs’ to collapse the logs, click on ‘Logs’ again to expand them. By default all logs will show. >

< ERRORS/WARNINGS: Only shows errors and warnings >
< ERRORS: Only show the errors >
< WARNINGS: Only shows warnings >
< INFO: Only shows informational updates >
< SUCCESS: Shows when a case sends to Salesforce, or when Pfollowup creates a case successfully >



}

Spellcheck, Theme, Generate CCFs{

Spellcheck

< ‘√’ indicates on, ‘X’ indicates off >

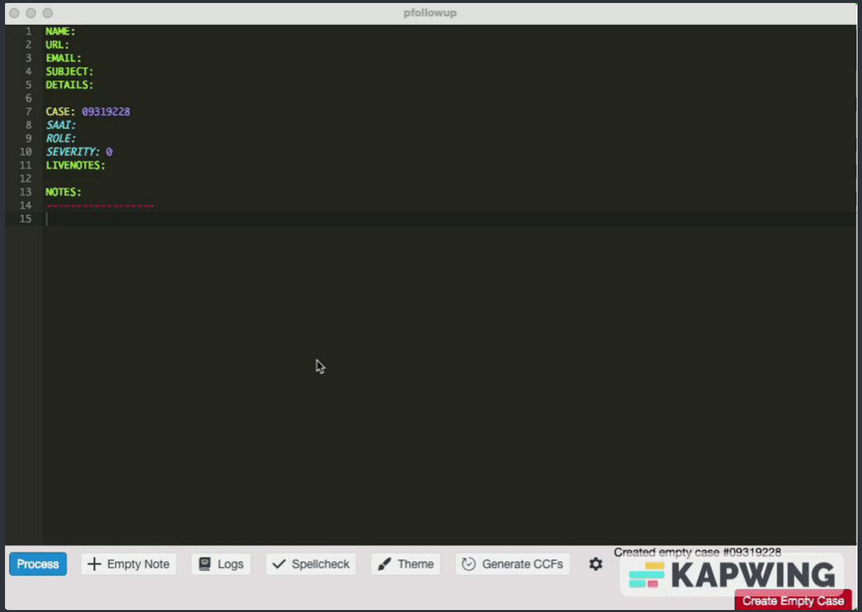
Theme

< Change the theme of Pfollowup >

}

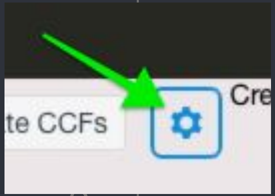
Generate CCFs

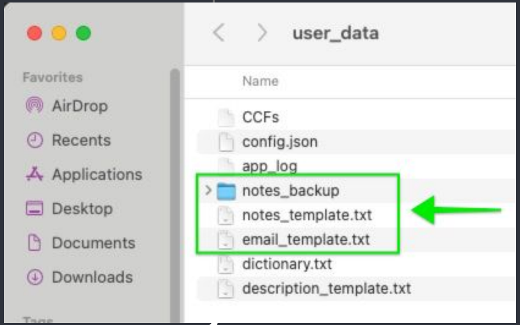
< Clicking this button will ensure that the CCA options available in Pfollowup match what we have in Salesforce >



Pfollowup ‘settings’ {

< Click the icon to open the settings for Pfollowup. There are 3 options in settings that we will go over >





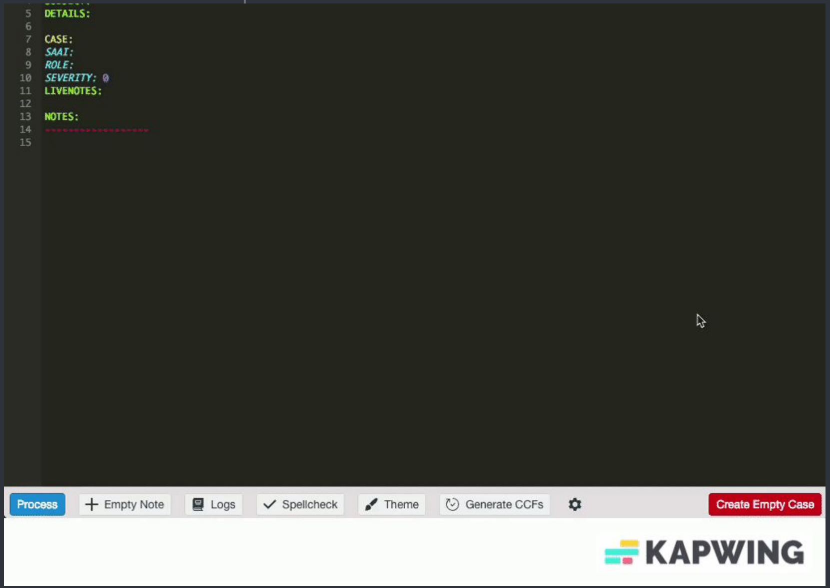
< notes_backup: If you close out of Pfollowup before sending out your follow up(s), you can recover those details here. >

< notes_template: The template that is used when you click ‘+Empty Note’. You can add “STATUS” to your notes template if you would like the option to process your follow up as something other than ‘Pending’>

< email_template: The template used to send out the email to the user after processing the follow up. You can adjust your signature here. >

Create Empty Case {

> What happens if Salesforce doesn't create a case for your call?



< You will want to click "**Create Empty Case**" in Pfollowup. This will create a empty case in Salesforce that you can send your follow up on. >

NOTE: Be certain to only do this if you have confirmed a case was **NOT** created for your call.

TroubleShooting Pfollowup {

< If you are running into errors with Pfollowup, do a find in page and/or reach out to #support_pfollowup for help >

}