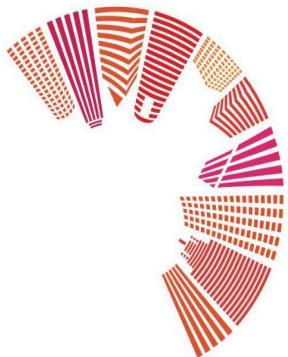


Salesforce

Training Guide



DOWNTOWN
DALLAS INC

Last updated:

Nov 01, 2021

Version history

Version	Date	Topics	Modified by
v.1.0	21 October 2021	Basics District360 modules	CUBE84

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Salesforce Guideposts

1. Salesforce is a Team Sport: Login and participate – don’t drop the ball!

2. Just do it: Always keep an eye out and make corrections and updates to contacts, Business, Building and affiliations.
3. Greatest Hits: Update Salesforce records with important notes + attachments

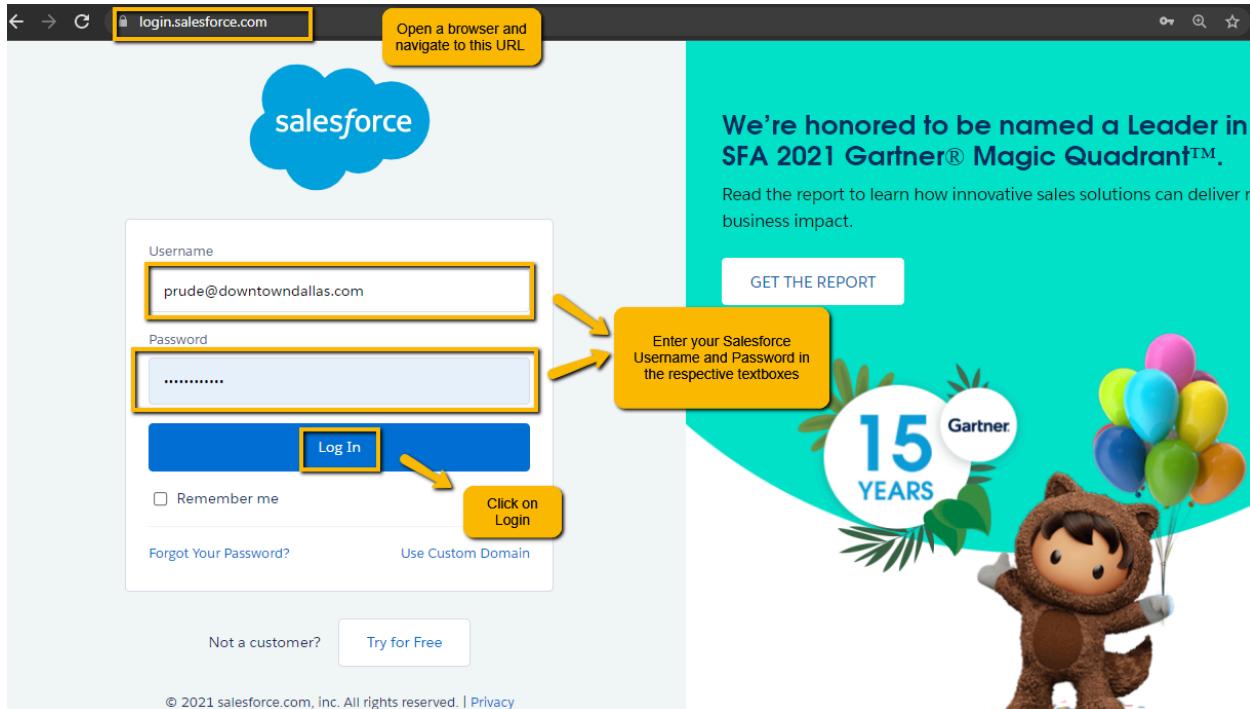
Before You Start: Data Entry Rules

1. Do not abbreviate street names in addresses. Spell out Street, Avenue, Boulevard, Parkway, etc.
2. Do not use punctuation in addresses. Do not put a comma before the quadrant (NW, NE, SW, SE) in street addresses. *For example:*
 - 1333 H Street NE
 - 1350 Pennsylvania Avenue NW
 - 55 M Street SE
 - 1101 6th Street SW
3. Always use the Global Search bar to search for records before you create a new record. It avoids creating duplicate entries.
4. The correct address is filled in the Building address fields for the Building on map component to work as intended. (Recommended to allow location access in the browser)
5. All required fields should be filled before saving any records

Login to Salesforce

Login Screen

- Use the below URL to login into the application
URL:<https://login.salesforce.com/>
- Enter the user credentials provided by your System Administrator and click on the Login button



- Users logging in for the first time will be taken to the traditional home page as shown in the screenshot below.

Forgot Login Credential/Password?

Forgot your password or simply want to change it? request a Salesforce System Admin to reset your password. An email will then be generated for you to reset your password.

If you are sharing a Salesforce user account with multiple users, use a web browser in incognito mode.

Getting Started

Objects in Salesforce are the major categories of data. The different Salesforce Objects appear on a ribbon across the top of your screen.

Downtown Dallas Inc.

Dashboard

Dallas Dashboard

Last refreshed 5 days ago. Refresh this dashboard to see the latest data.

As of Oct 27, 2021, 12:52 PM-Viewing as Doug Prude

Total number of finished units i... Total number of finished units in CBD

9.3k

Total Units Under Construction... Total Units Under Construction in CBD

700

Total units announced in CBD Total units announced in CBD

363

[View Report \(Total number of finished units in CBD\)](#)

[View Report \(Total Units Under Construction in CBD\)](#)

[View Report \(Total units announced in CBD\)](#)

Buildings by Building Type
Buildings by Building Type

Building Type
Commercial

Buildings by Status
Buildings by Status

Record Count
0 800 1.6k

Buildings by PID Assignment
Buildings by PID Assignment

Record Count
0 2k

Recent Records

- [Hotel Keys Dashboard](#)
- [Residential & Population Dashboard](#)
- [Dallas Dashboard](#)
- [Cube84 \(sample Major Initiatives\)](#)
- [Dallas Morning News](#)

View All

Today's Tasks

Nothing due today. Be a go-getter, and check back soon.

[View All](#)

Building

Create/Edit a Building Record

a. Create a New Building

1. Navigate to the Properties Tab and click on either New or New Properties button.

Downtown Dallas Inc.

Buildings Recently Viewed

+ New Building

Recent records

Cube84
2020 Live Oak
Cortland Farmers Market
Cortland Good Latimer
KPMG Plaza

Recent lists

All

+ Open "Recently Viewed" in New Tab

New Import

2. Enter information into all necessary fields and Click on Save

New Building

Information

* Building Name Complete this field.

Owner Doug Prude

Building ID

Status --None--

Parent Owner Search Parent Owners...

Total Square Footage

Rentable Building Area (Sq.Ft)

Building Type

Available Chosen

Arts and Culture

Commercial

Commercial Real Estate

Education

No of Parcels

Rentable Building Area (Sq.Ft)

Districts --None--

Cancel Save & New Save

3. New Building is created

Downtown Dallas Inc. Home Chatter Parent Owners Buildings Businesses Contacts Vacancies Major Initiatives Reports More

Building Cube84

New Building record is created

Building Name	Cube84
Building ID	
Parent Owner	
Building Type	Residential
No of Parcels	
Districts	
Block #	
Petition Group	
True Owner	
Keys for Hotel	
Hotel Operator	
Units for Residential	
PID Assignment	

Owner: Doug Prude

Total Square Footage: 0

Rentable Building Office Area (Sq.Ft):

Rentable Building Retail Area (Sq.Ft):

Surface Parking Lots:

Structured Parking Lots:

Related List Quick Links:

- Property Ownership & Managements (2)
- Tenant Occupancies (1)
- Major Initiatives (0)
- Property Assessments (2)
- Vacancies (0)
- Files (0)

Activity:

Email Log a Call New Task New Event

Write an email... Compose

Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue: No next steps. To get things moving, add a task or set up a meeting.

b. Edit an existing Building

- To change or add information to a record, click on the **Edit** button in the upper right hand corner of your screen. Be sure to **Save** any changes that you make.

Downtown Dallas Inc. Home Chatter Parent Owners Buildings Businesses Contacts Vacancies Major Initiatives Reports More

Building Cube84

Edit

Navigate to any Building record and click on Edit button

Building Name	Cube84
Building ID	
Parent Owner	
Building Type	Residential
No of Parcels	
Districts	
Block #	
Petition Group	
True Owner	
Keys for Hotel	
Hotel Operator	
Units for Residential	
PID Assignment	

Owner: Doug Prude

Total Square Footage: 0

Rentable Building Office Area (Sq.Ft):

Rentable Building Retail Area (Sq.Ft):

Surface Parking Lots:

Structured Parking Lots:

Related List Quick Links:

- Property Ownership & Managements (2)
- Tenant Occupancies (1)
- Major Initiatives (0)
- Property Assessments (2)
- Vacancies (0)
- Files (0)

Activity:

Email Log a Call New Task New Event

Write an email... Compose

Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue: No next steps. To get things moving, add a task or set up a meeting.

Affiliate Building Owners & Managers to Building

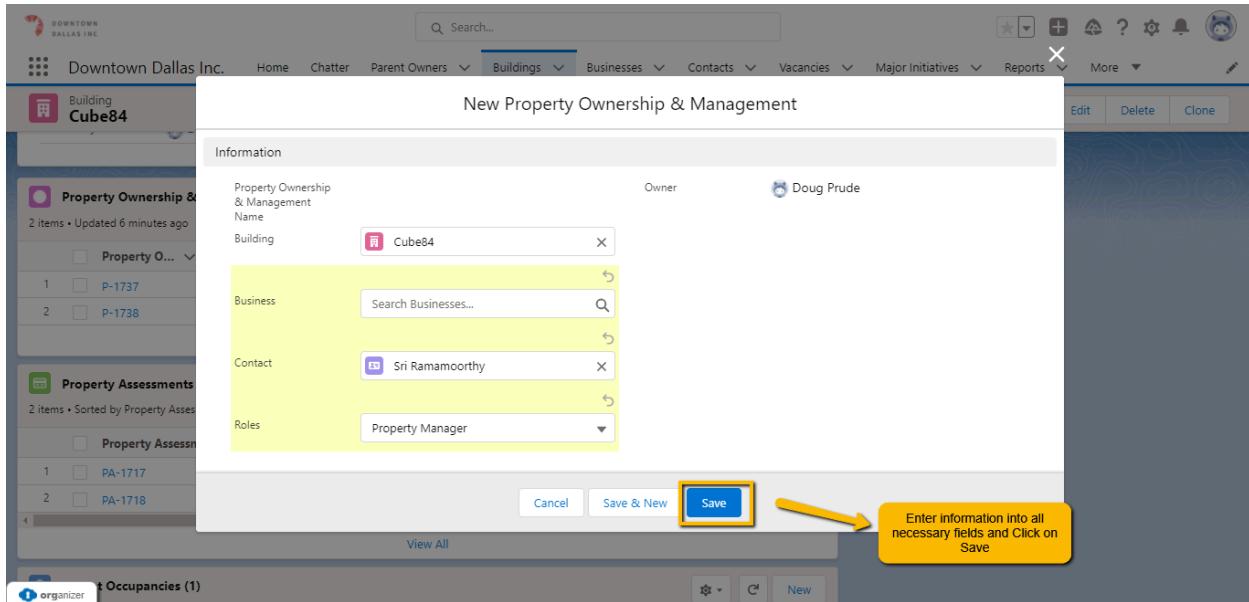
1. After a Building is created, scroll down to *Building Ownership and Management* related list and click New to add respective Building owners/managers for the Building.

The screenshot shows the Salesforce interface for the 'Building' object. The top navigation bar includes links for Home, Chatter, Parent Owners, Buildings, Businesses, Contacts, Vacancies, Major Initiatives, Reports, and More. The 'Buildings' tab is selected. Below the navigation is a search bar and a toolbar with icons for Follow, Edit, Delete, and Clone. The main content area displays three related lists: 'Property Ownership & Managements' (2 items), 'Property Assessments' (2 items), and 'Occupancies' (1 item). A yellow callout box with an arrow points to the 'New' button in the 'Property Ownership & Managements' list header, with the text: 'Navigate to any property record and scroll down to Property Ownership & Management related list and Click New'.

Property Owner	Business	Contact	Role
P-1737	Cube84 Inc.	Sri Ramamoorthy	Property Manager
P-1738		Shiva	Property Manager

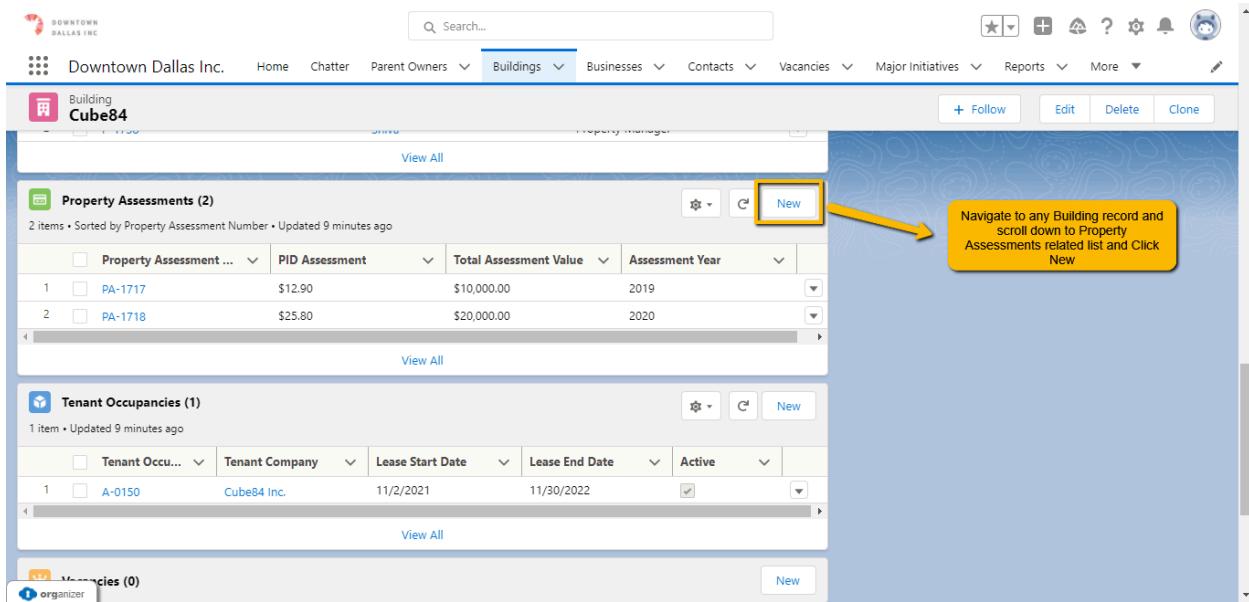
Property Assessment	PID Assessment	Total Assessment Value	Assessment Year
PA-1717	\$12.90	\$10,000.00	2019
PA-1718	\$25.80	\$20,000.00	2020

2. Building owners/managers can be a Business or individual, use the *owner Business or contact lookup field* and make sure we assign a role before we save the record.

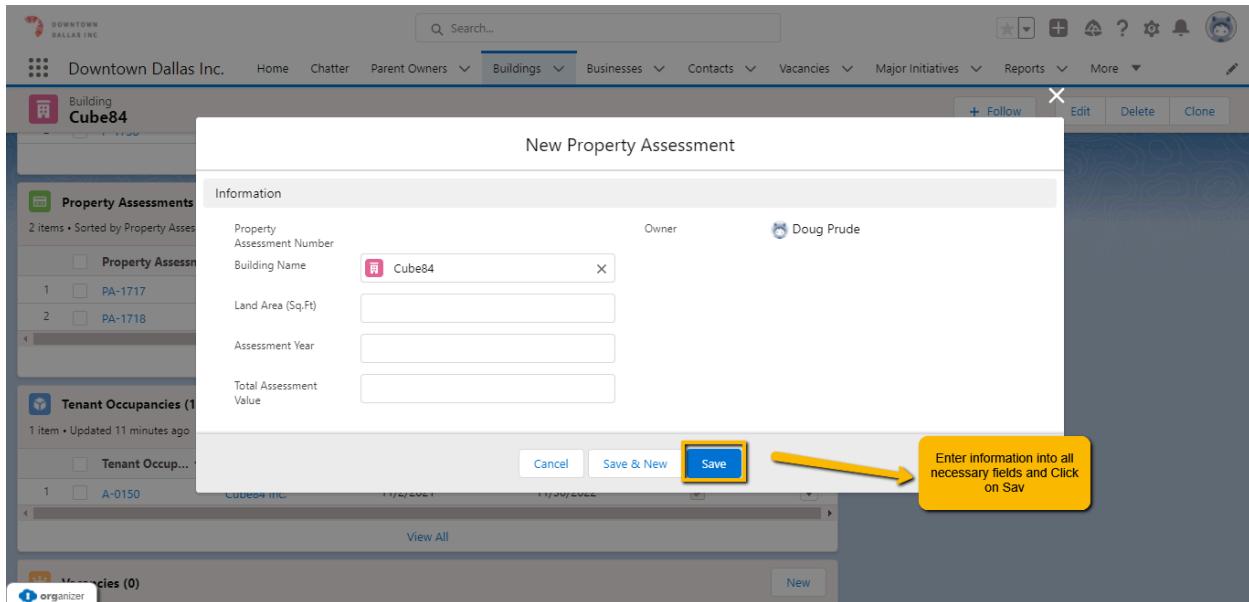


Add Building Assessments to Building

1. After a Building is created, scroll down to *Assessments* related list and click *New* to add assessment information for the Building.

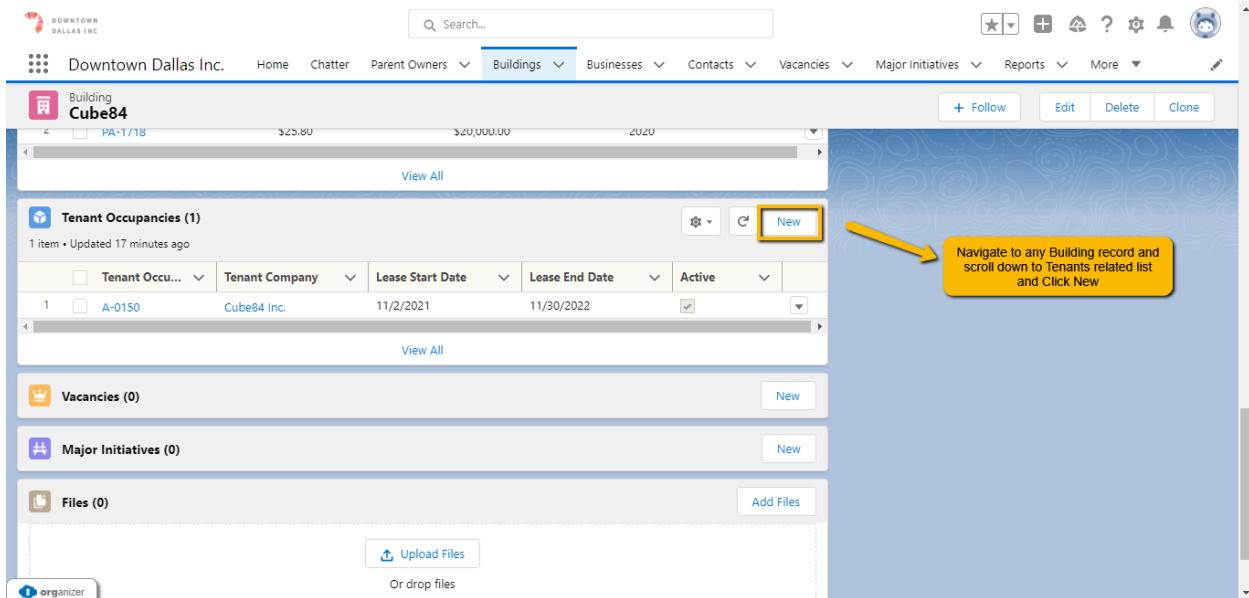


2. Enter information into all necessary fields and Click on Save

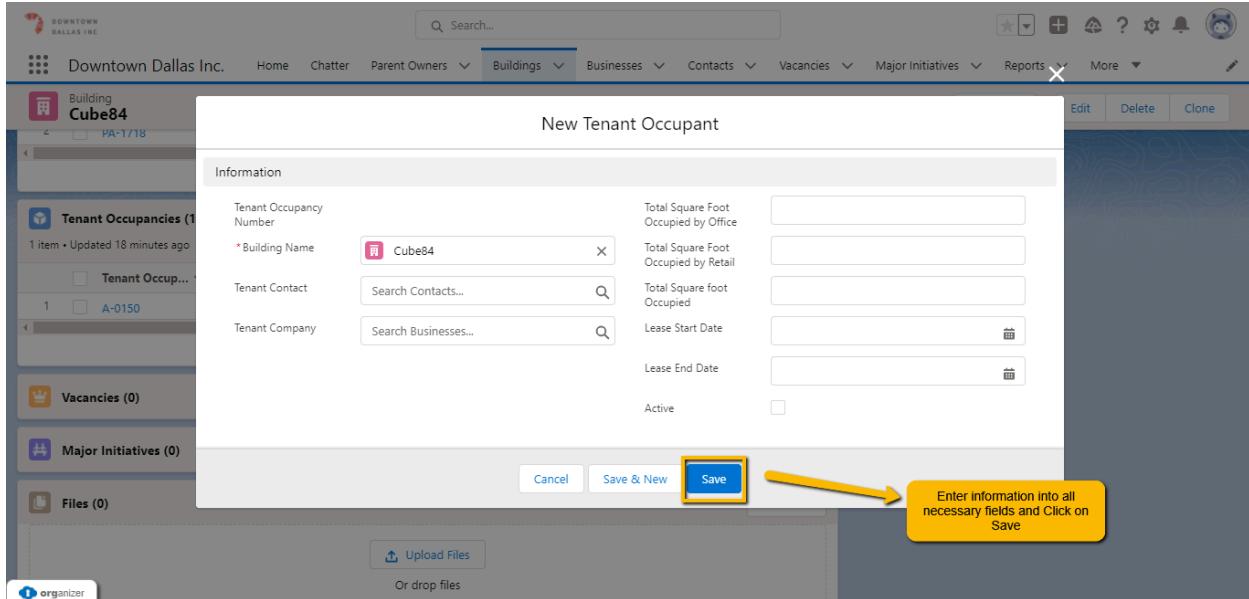


Add Tenants to Building

1. After a Building is created, scroll down to *Tenants* related list and click New to add tenants information for the Building.



2. Enter information into all necessary fields and Click on Save



Business

Create/Edit a Business Record

- Conduct a thorough search to prevent creating a duplicate account/ Business by entering the Business name in the search field at the top of your screen. If you are unsure of the spelling, enter the first 2-3 letters of the name in the search field at the top of your screen to see all of the companies that contain words beginning with those letters.

***** To search for a Business that has no name, enter the street address of the Business in the search field at the top of your screen. If your search does not locate an existing Business click on Companies and then click on the New button. *****

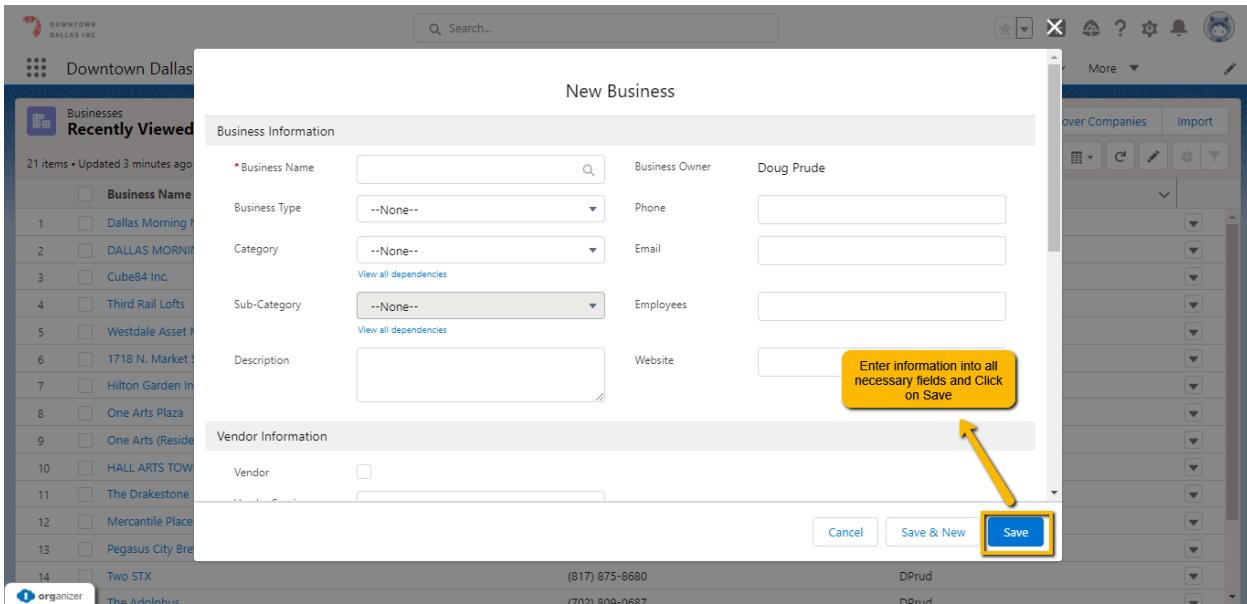
The screenshot shows the 'Dallas Dashboard' on the 'Businesses' tab. It features several large numerical KPIs: 'Total number of finished units in CBD' (9.3k), 'Total Units Under Construction in CBD' (700), and 'Total units announced in CBD' (363). Below these are smaller sections for 'Buildings by Building Type' and 'Buildings by Status'. A search bar at the top is highlighted with a yellow box.

a. Create a New Business

1. Navigate to the Companies Tab and click on either the New or New Business button.

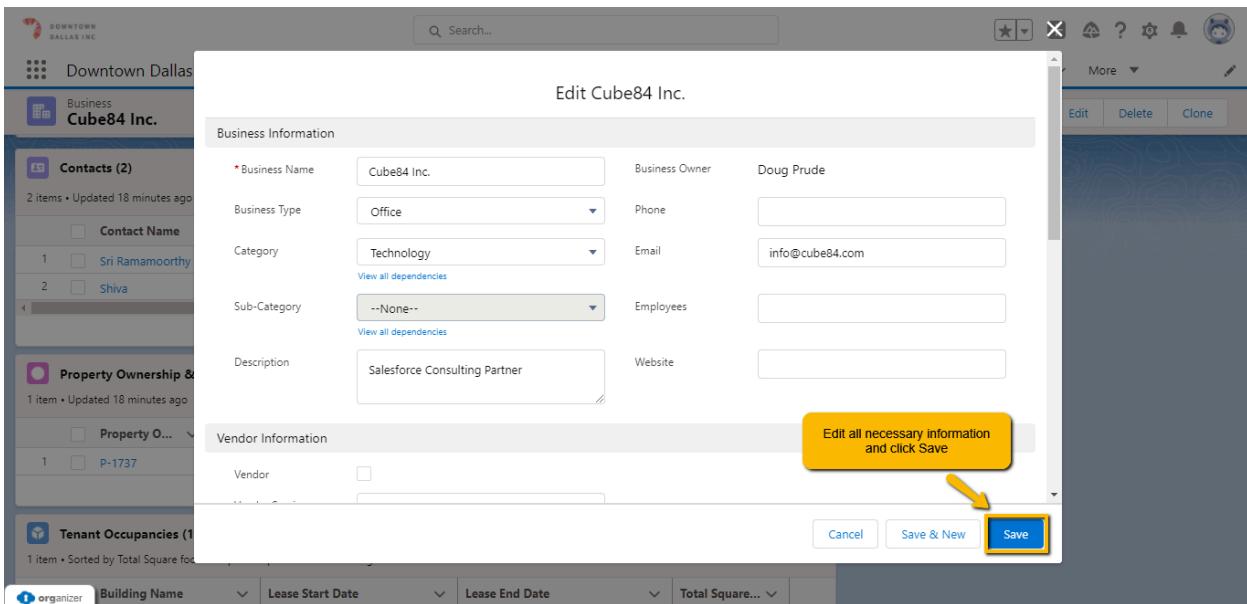
The screenshot shows the 'Businesses' tab with a 'Recently Viewed' list on the left. At the top right, there are two prominent buttons: '+ New Business' and 'New'. A yellow callout box points to the '+ New Business' button with the instruction: 'Navigate to Business tab record and click on either New Business or New button'.

2. Enter information into all necessary fields then Click on Save



b. Edit an existing Business

1. To change or add information to a record, click on the Edit button in the upper right hand corner of your screen. Be sure to Save any changes that you make.



Contact

Create/Edit a Contact Record

a. Create a New Contact

1. Navigate to any Business record and scroll down to Contacts related list and Click New.

The screenshot shows the Salesforce interface for the 'Downtown Dallas Inc.' account. The top navigation bar includes links for Home, Chatter, Parent Owners, Buildings, Businesses, Contacts, Vacancies, Major Initiatives, Reports, and More. The 'Businesses' tab is currently selected. Below the navigation bar, the page title is 'Business Cube84 Inc.'. The main content area displays the 'Contacts (2)' related list. A yellow callout box with an arrow points to the 'New' button at the top right of the list. Another yellow callout box contains the instruction: 'Navigate to any Business record and scroll down to Contacts related list and Click New.'

2. Enter information into all necessary fields and Click on Save

The screenshot shows the 'New Contact' creation dialog box. The title bar says 'New Contact'. The 'Contact Information' section contains fields for Name (Salutation, First Name, Middle Name, Last Name, Suffix), Title, Phone (12025051056), and Mobile. A yellow callout box with an arrow points to the 'Save' button at the bottom right of the dialog. Another yellow callout box contains the instruction: 'Enter information into all necessary fields and Click on Save'.

b. Edit an existing Contact

1. Navigate to any Business record and scroll down to the Contacts related list click on the dropdown arrow and hit Edit

The screenshot shows the Salesforce interface for a business record named "Cube84 Inc.". The top navigation bar includes links for Home, Chatter, Parent Owners, Buildings, Businesses, Contacts, Vacancies, Major Initiatives, Reports, and More. The main content area displays the business details and two related lists: "Contacts (2)" and "Property Ownership & Managements (1)". The "Contacts" list shows two entries: Sri Ramamoorthy (Salesforce Consultant) and Shiva (Business Analyst). A yellow callout box with an arrow points to the dropdown arrow icon next to the "Edit" button in the "Contacts" list header. Another yellow callout box with an arrow points to the "Edit" button in the "Contacts" list header.

Contact Name	Title	Email	Phone
Sri Ramamoorthy	Salesforce Consultant	sridhar@cube84.com	(988) 452-3966
Shiva	Business Analyst	shiva@cube84.com	

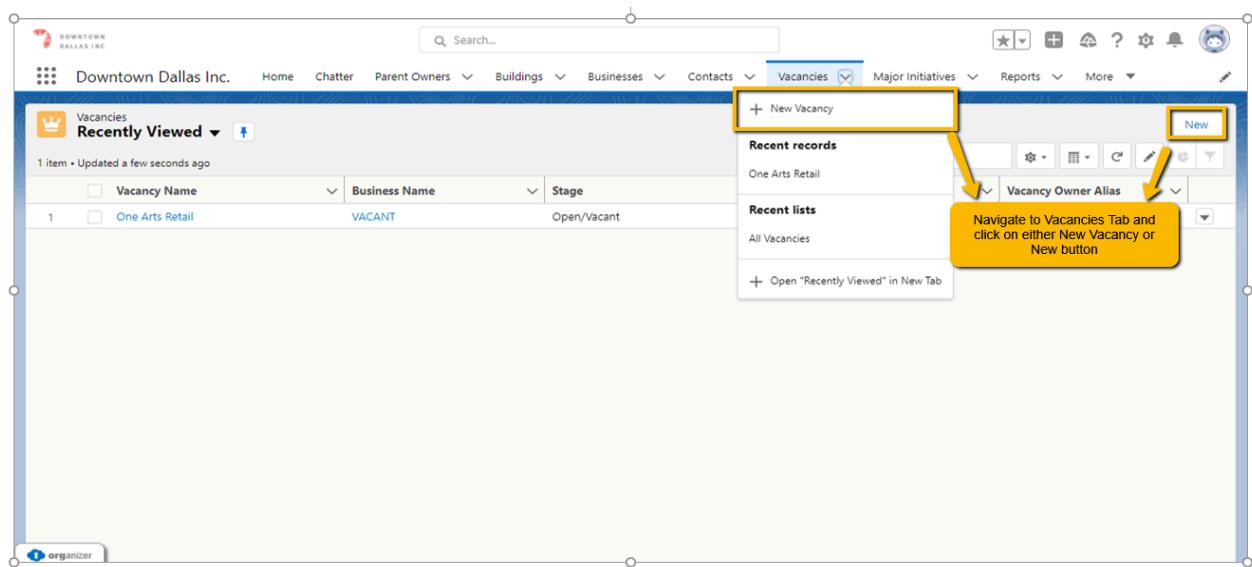
Property O...	Building	Roles	Contact
P-1737	Cube84	Property Manager	Sri Ramamoorthy

Vacancies

Create/Edit a Vacancy

a. Create a Vacancy

1. Navigate to the Vacancies Tab and click on either New or New Vacancy button



2. Enter information into all necessary fields and Click on Save

A screenshot of the 'New Vacancy' detail page. The 'Vacancy Information' section is shown with various fields filled out. A yellow callout box points to the 'Save' button at the bottom right, with the text: 'Enter information into all necessary fields and Click on Save'.

The 'Vacancy Information' section includes the following fields:

- *Vacancy Name: District360
- *Business Name: Cube84 Inc.
- Building Name: Search Buildings...
- Type: --None--
- Broker: Search Contacts...
- Brokerage firm: Search Businesses...
- Sign District: --None--
- Expected Sale/Lease Amount (Sq.Ft): (empty)
- *Lease/Sale Date: (empty)
- *Stage: --None--

b. Edit an existing Vacancy

1. To change or add information to a record, click on the **Edit** button in the upper right hand corner of your screen. Be sure to **Save** any changes that you make.

The screenshot shows the Downtown Dallas Inc. Salesforce application. The top navigation bar includes links for Home, Chatter, Parent Owners, Buildings, Businesses, Contacts, Vacancies (which is currently selected), Major Initiatives, Reports, and More. The main content area displays a Vacancy record for "VACANT". The record details are as follows:

Vacancy Name	VACANT
Business Name	VACANT
Building Name	Taylor Lofts (East Parcel)
Type	
Broker	
Brokerage firm	
Sign District	
Building Type	Commercial Residential
Building Details	
Organizer	0000010303600000
Year Built	2019

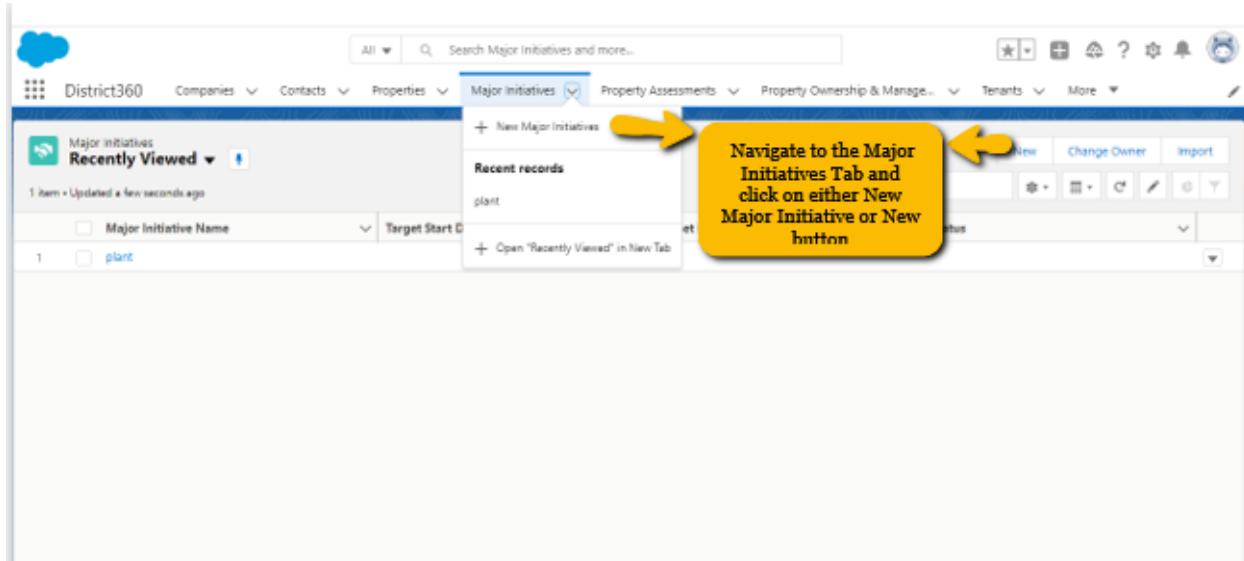
The top right of the record view has buttons for + Follow, Edit (which is highlighted with a yellow box and arrow), Delete, and Clone. Below the record, there's a "Related List Quick Links" section with Prospective Tenants (0), Files (0), and Notes (0). On the right, there are buttons for Email, Log a Call, New Task, and New Event, along with a compose button and filters for All time, All activities, All types, Refresh, Expand All, and View All. A note at the bottom says "No next steps. To get things moving, add a task or set up a meeting."

Major Initiative

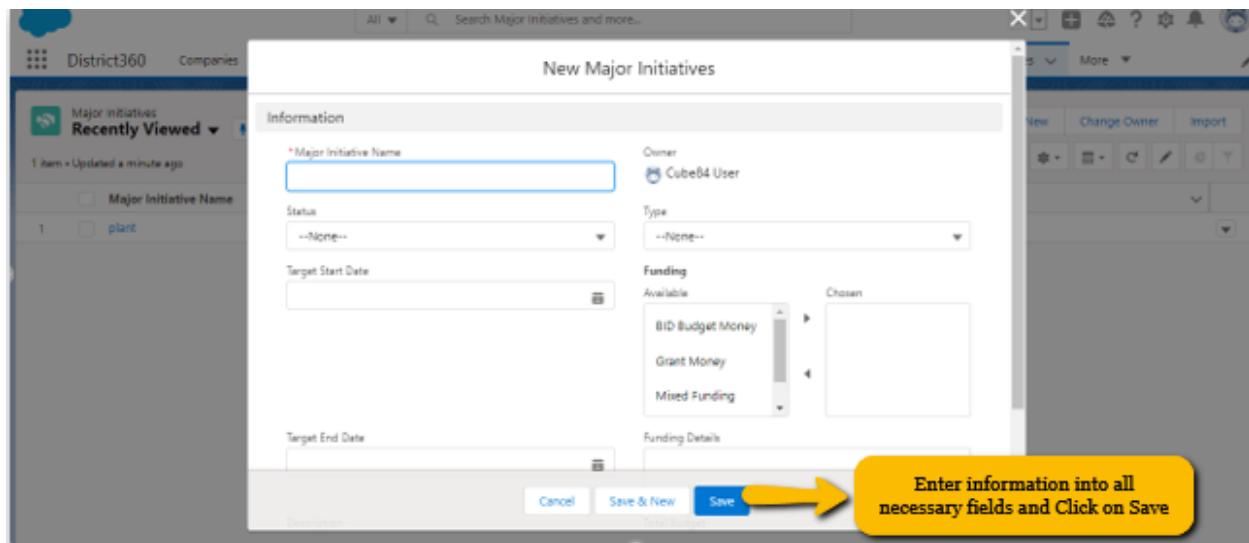
Create/Edit a Major Initiative

a. Create a New Major Initiatives

1. Navigate to the Major Initiatives Tab and click on either New or New Major Initiatives button

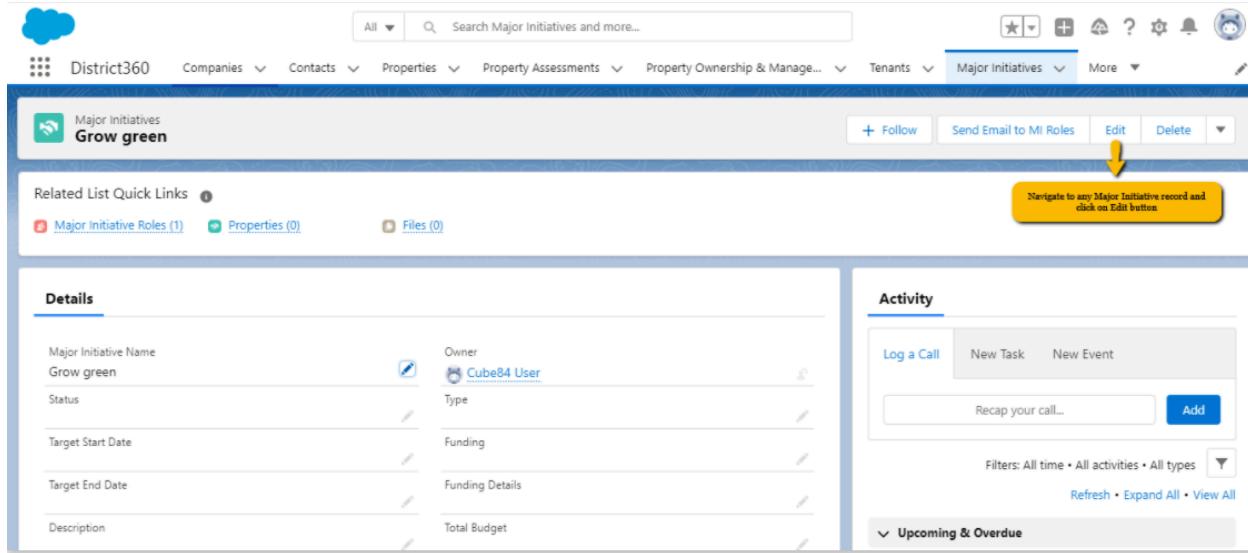


2. Enter information into all necessary fields and Click on Save



b. Edit an existing Major Initiatives

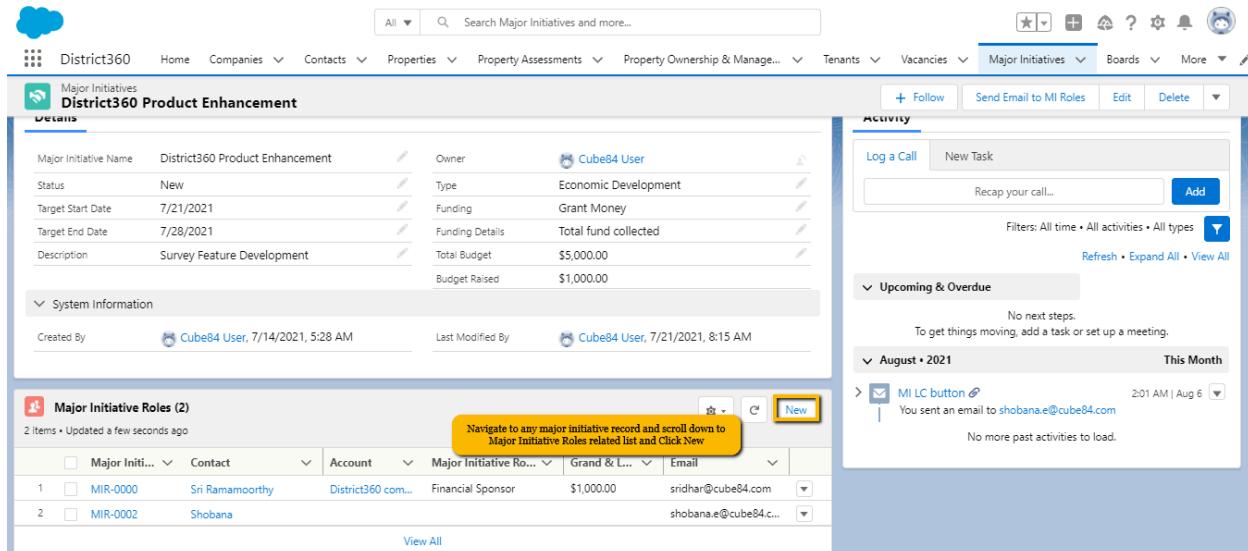
- To change or add information to a record, click on the Edit button in the upper right hand corner of your screen. Be sure to Save any changes that you make.



The screenshot shows the District360 application interface. At the top, there's a navigation bar with links for Companies, Contacts, Properties, Property Assessments, Property Ownership & Management, Tenants, Major Initiatives (which is currently selected), and More. Below the navigation is a search bar and a toolbar with various icons. The main content area displays a record for a Major Initiative named 'Grow green'. On the left, there's a 'Details' section with fields for Major Initiative Name (Grow green), Owner (Cube84 User), Status, Type, Target Start Date, Target End Date, Description, Funding, Funding Details, Total Budget, and Activity. On the right, there's an 'Activity' section with tabs for Log a Call, New Task, and New Event, and a summary of upcoming and overdue activities. A yellow box with a callout 'Navigate to any Major Initiative record and click on Edit button' is overlaid on the 'Edit' button in the top right corner of the main content area.

Add Major Initiative Roles to Major Initiatives

- After a Major Initiative record is created, scroll down to the *Major Initiative Roles* related list and click New to add MI role information for the Major Initiative



The screenshot shows the District360 application interface. At the top, there's a navigation bar with links for Home, Companies, Properties, Property Assessments, Property Ownership & Management, Vacancies, Major Initiatives (selected), Boards, and More. Below the navigation is a search bar and a toolbar with various icons. The main content area displays a record for a Major Initiative named 'District360 Product Enhancement'. On the left, there's a 'Details' section with fields for Major Initiative Name, Status, Target Start Date, Target End Date, Description, Owner (Cube84 User), Type (Economic Development), Funding (Grant Money), Funding Details (Total fund collected), Total Budget (\$5,000.00), and Budget Raised (\$1,000.00). On the right, there's an 'Activity' section with tabs for Log a Call, New Task, and New Event, and a summary of upcoming and overdue activities. Below the details, there's a 'Major Initiative Roles' section showing two items. A yellow box with a callout 'Navigate to any major initiative record and scroll down to Major Initiative Roles related list and Click New' is overlaid on the 'New' button in the top right corner of the 'Major Initiative Roles' list.

2. Enter information into all necessary fields and Click on Save

New Major Initiative Roles

Information

Major Initiative Roles Number	Grand & Loan Amount
* Major Initiatives Search Major Initiatives...	Major Initiative Roles --None--
Contact Search Contacts...	Description
Account Search Companies...	
Grants Completed --None--	

Grant & Loan Amount Received

Loans Completed

Cancel Save & New **Save** → Enter information into all necessary fields and Click on Save

Understanding Related Lists

Each of DWB Objects (Business, Contacts, Building, etc.) is related to each other. Each has a different set of related lists which appear as sections of a record or detail page:

- 1) Related list will appear on the bottom of the record page and

- 2) Related List Quick Links (*will be on the top of each record page of all the objects*)

Downtown Dallas Inc.

Business Cube84 Inc.

Contacts (2)
2 items • Updated a few seconds ago

Contact Name	Title	Email	Phone
Sri Ramamoorthy	Salesforce Consultant	sridhar@cube84.com	
Shiva	Business Analyst	shiva@cube84.com	(988) 452-3966

Property Ownership & Managements (1)
1 item • Updated a few seconds ago

Property O...	Building	Roles	Contact
P-1737	Cube84	Property Manager	Sri Ramamoorthy

Tenant Occupancies (1)
1 item • Sorted by Total Square foot Occupied • Updated a few seconds ago

organizer

Downtown Dallas Inc.

Business Cube84 Inc.

Phone Mailing Address Website Business Owner
2221 South Clark Street Doug Prude

We found no potential duplicates of this Business.

Business Information

Business Name	Cube84 Inc.	Business Owner	Doug Prude
Business Type	Office	Phone	
Category	Technology	Email	info@cube84.com
Sub-Category		Employees	
Description	Salesforce Consulting Partner	Website	

Vendor Information

Vendor	
Vendor Services	

Related List Quick Links

- Contacts (2)
- Property Ownership & Managements (1)
- Tenant Occupancies (1)

Activity Chatter

Email Log a Call New Task New Event

Write an email... Compose

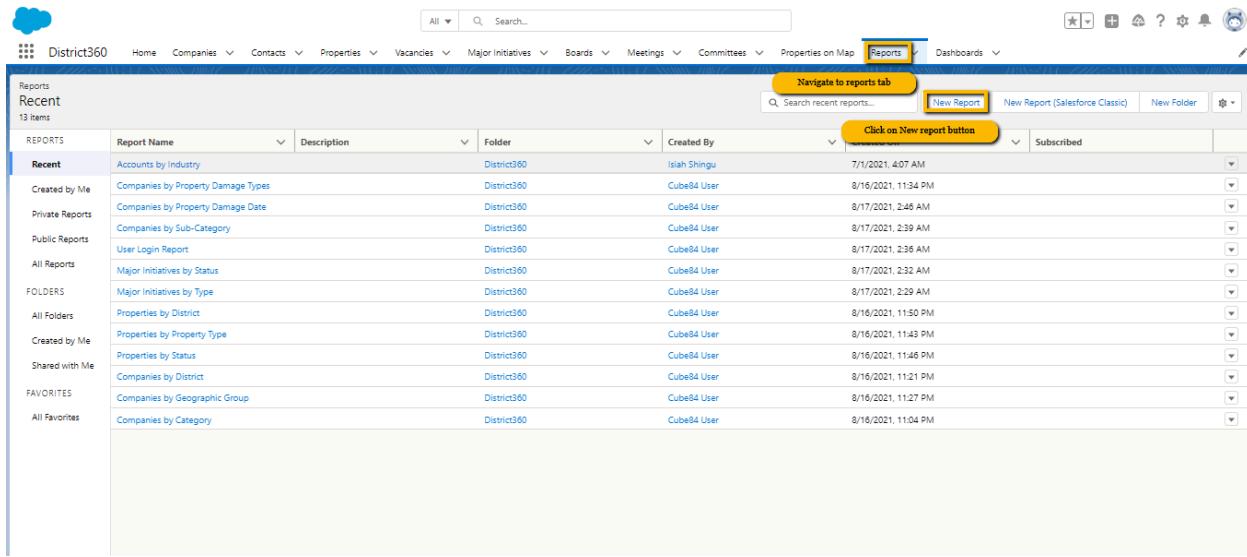
Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue

Reports & Dashboards

a. Creating Reports

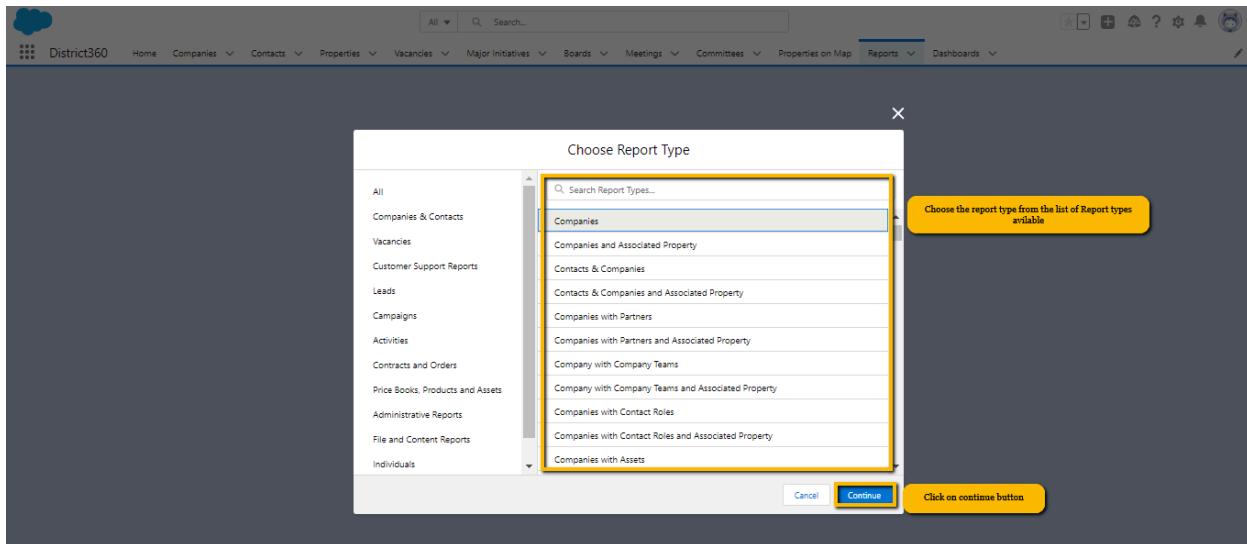
- From the reports tab, click New Report.



The screenshot shows the District360 software interface. At the top, there is a navigation bar with links for Home, Companies, Contacts, Properties, Vacancies, Major Initiatives, Boards, Meetings, Committees, Properties on Map, Reports (which is the active tab), and Dashboards. Below the navigation bar is a search bar and a toolbar with various icons. On the left, there is a sidebar with categories like Reports, Folders, and Favorites, each listing recent items. The main area displays a table of recent reports with columns for Report Name, Description, Folder, Created By, and Date Created. A yellow box highlights the 'New Report' button in the top right corner of the report list table.

Report Name	Description	Folder	Created By	Date Created
Accounts by Industry		District360	Isiah Shingu	8/1/2021, 4:07 AM
Companies by Property Damage Types		District360	Cube84 User	8/16/2021, 11:34 PM
Companies by Property Damage Date		District360	Cube84 User	8/17/2021, 2:46 AM
Companies by Sub-Category		District360	Cube84 User	8/17/2021, 2:39 AM
User Login Report		District360	Cube84 User	8/17/2021, 2:36 AM
Major Initiatives by Status		District360	Cube84 User	8/17/2021, 2:32 AM
Major Initiatives by Type		District360	Cube84 User	8/17/2021, 2:29 AM
Properties by District		District360	Cube84 User	8/16/2021, 11:50 PM
Properties by Property Type		District360	Cube84 User	8/16/2021, 11:43 PM
Properties by Status		District360	Cube84 User	8/16/2021, 11:46 PM
Companies by District		District360	Cube84 User	8/16/2021, 11:21 PM
Companies by Geographic Group		District360	Cube84 User	8/16/2021, 11:27 PM
Companies by Category		District360	Cube84 User	8/16/2021, 11:04 PM

- Choose a report type, and then click Continue.
- The report type you choose determines which records are returned and which fields are available in your report.

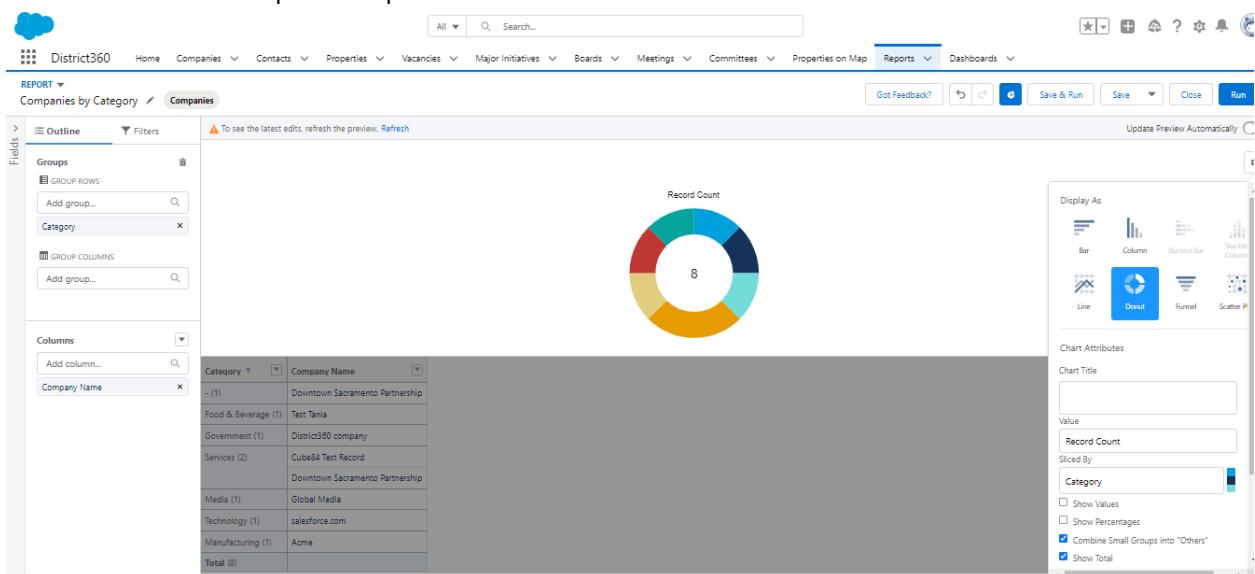


- The report opens in edit mode and shows a preview.
- In edit mode, add and remove fields to your report as columns, group rows and columns, filter report data, and show or hide a chart. Customize your report until it shows exactly the data that you need.

	Account Name	Category	Sub-Category	Billing State/Province	Employees
1	Cube64	-	-	-	-
2	Rowswell Realty Leasing Co.	Property Management	-	MB	45
3	Royal Canadian Properties Limited	Property Management	-	MB	0
4	Royal Canadian Securities Limited	Property Management	-	MB	0
5	Shelter Canadian Properties	Property Management	-	MB	5
6	Skyline Realty	Property Management	-	MB	0
7	Smith Agency Ltd	Property Management	-	MB	-
8	Smith Agency Ltd	Property Management	-	MB	-
9	Smith Agency Ltd	Property Management	-	MB	-
10	Smith Agency Ltd	Property Management	-	MB	-
11	Smith Agency Ltd	Property Management	-	MB	-
12	Cushman & Wakefield Stevenson	Property Management	-	MB	5
13	Sussex Rentals Office	Property Management	-	MB	3
14	The Avenue Building	Property Management	-	MB	0
15	The Edge on Princess	Property Management	-	MB	0

- To add a column to your report,
 1. Search a field from the Add column search bar...
 2. Alternatively, expand the Fields panel, then drag-and-drop a field onto the Columns list or directly onto the report preview.
- To remove a column from your report,

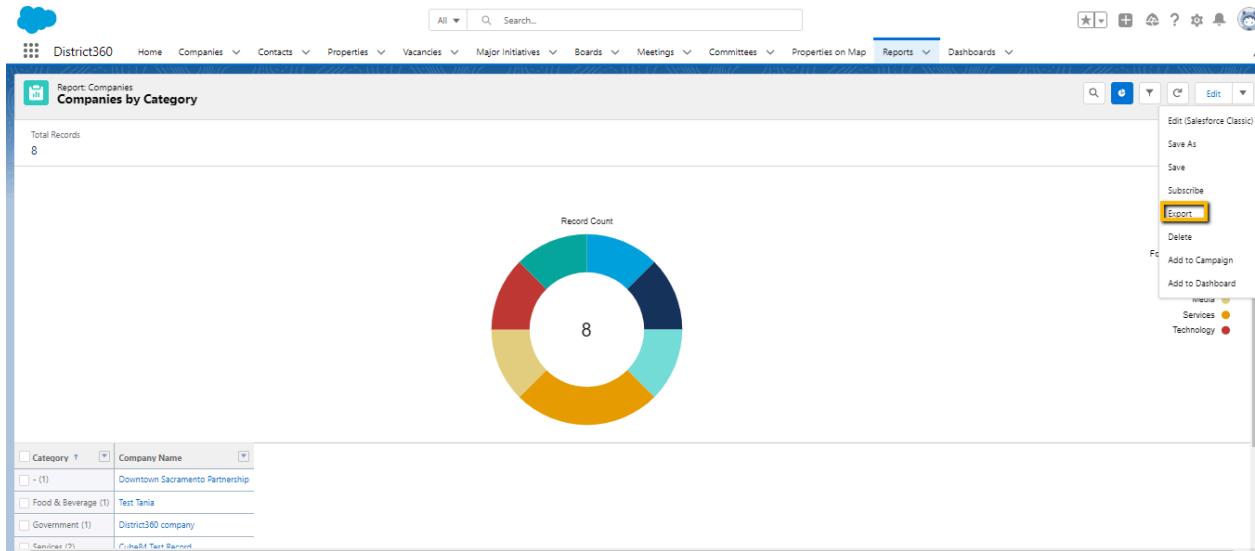
- From the Columns list, find the column you want to remove. Then click .
 - Alternatively, from the preview pane, find the column you want to remove. Click  | Remove Column.
 - To remove all columns from your report, from the Columns list, click .
 - Removing a column from your report doesn't delete the field. If you remove a column but want it back, add it again.
- Click Save. If you're creating a brand new report, give it a name. Optionally, give it a description. With access and sharing in mind, save the report in an appropriate folder.
 - To view complete report results, click Run.



- Please refer this video to build a report -
<http://salesforce.vidyard.com/watch/qGpi4cPjtUWQ7XV1jT6xnM>

b. Exporting Reports

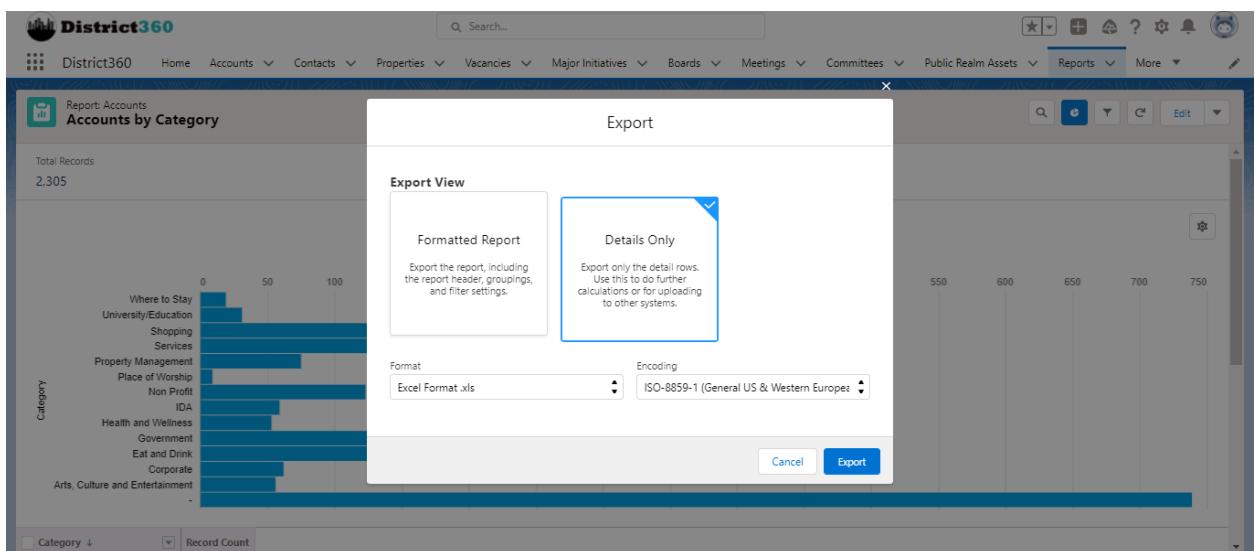
- From Reports, next to the report you want to export, click  | Export.



- Choose an Export View.

Formatted Report exports the report as it appears in Salesforce, with the report header, groupings, and filter details. Because formatting is retained, you can't choose an encoding and the only supported formatted export file type is .XLSX.

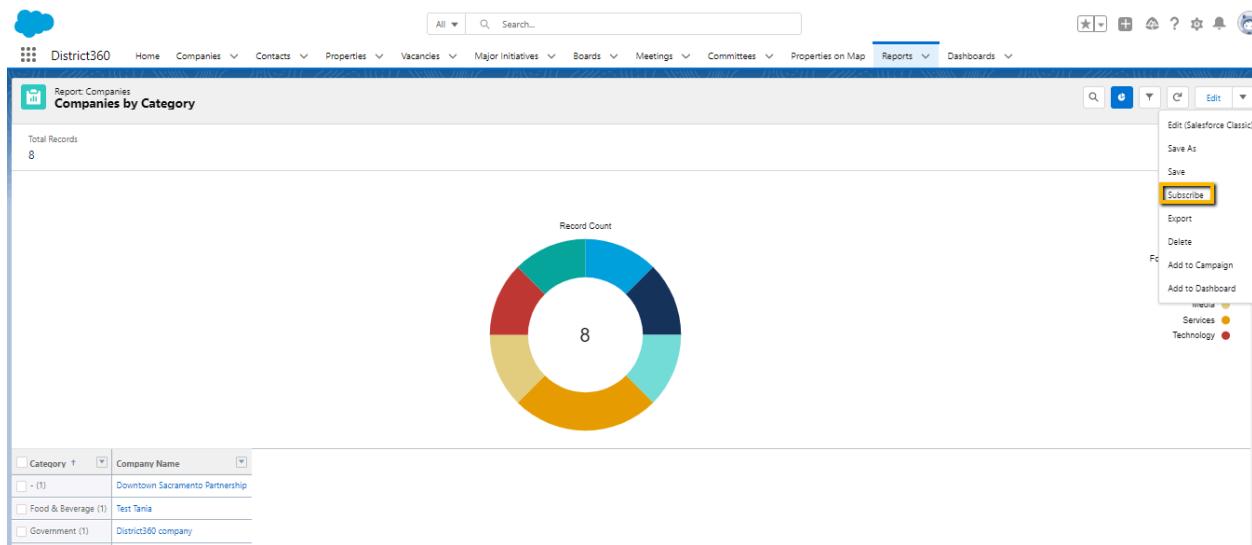
Details Only exports each detail row without formatting and is useful for doing further calculations in a spreadsheet.
- If exporting as Details Only, set an Encoding appropriate for your language and locale.
- If exporting as Details Only, set the Format to Excel Format .xls or Comma Delimited .CSV.
- Click Export.



- If prompted by a browser dialog, choose to save the file.

c. Subscribe to Reports

- From the Reports tab or from the report run page, click | Subscribe. If you've already subscribed to a report but want to change the schedule, take the same action.



- From the Edit Subscription menu, set the subscription schedule. For example for the weekly sales report, choose a weekly subscription with delivery Monday 8:00 AM.
- Optionally, add conditions. The conditions are evaluated when the report is run according to the schedule you set. The report is only emailed if all conditions are met.
- Under Send To, you are automatically selected as a recipient. To add others or remove yourself, click Edit Recipients.
- Select from the available entity types and start typing to see all the matching names. Only the users, groups, or roles with permission to access the report are shown in the list of matches.
- Select from the matching options and click Add to add to the list of subscribers. Add more users, groups, or roles as needed and then close the Edit Recipients window.
- When the subscription emails the refreshed report to each recipient, it sends to the email address set in Settings | Email | My Email Settings. If no email is set in My Email Settings, then the refreshed report is sent to the recipient's email address set on their Salesforce User record.

! **IMPORTANT** Recipients see emailed report data as the person running the report. Consider that they may see more or less data than they normally see in Salesforce.

- Under Run Report As, specify who runs the report.
 - Me — You run the report, and recipients see report data in the emailed report as you.
 - Another Person — Specify someone who has permission to run reports and who has access to the report.

Edit Subscription

Schedule

Frequency

Daily **Weekly** Monthly

Days

Sun Mon Tue **Wed** Thu Fri Sat

Time

10:00 AM

Conditions

In addition to subscribing, you can set up conditions on this report. You will be notified when conditions are met. This is optional.

Add conditions to this report

Subscribe

Send email to

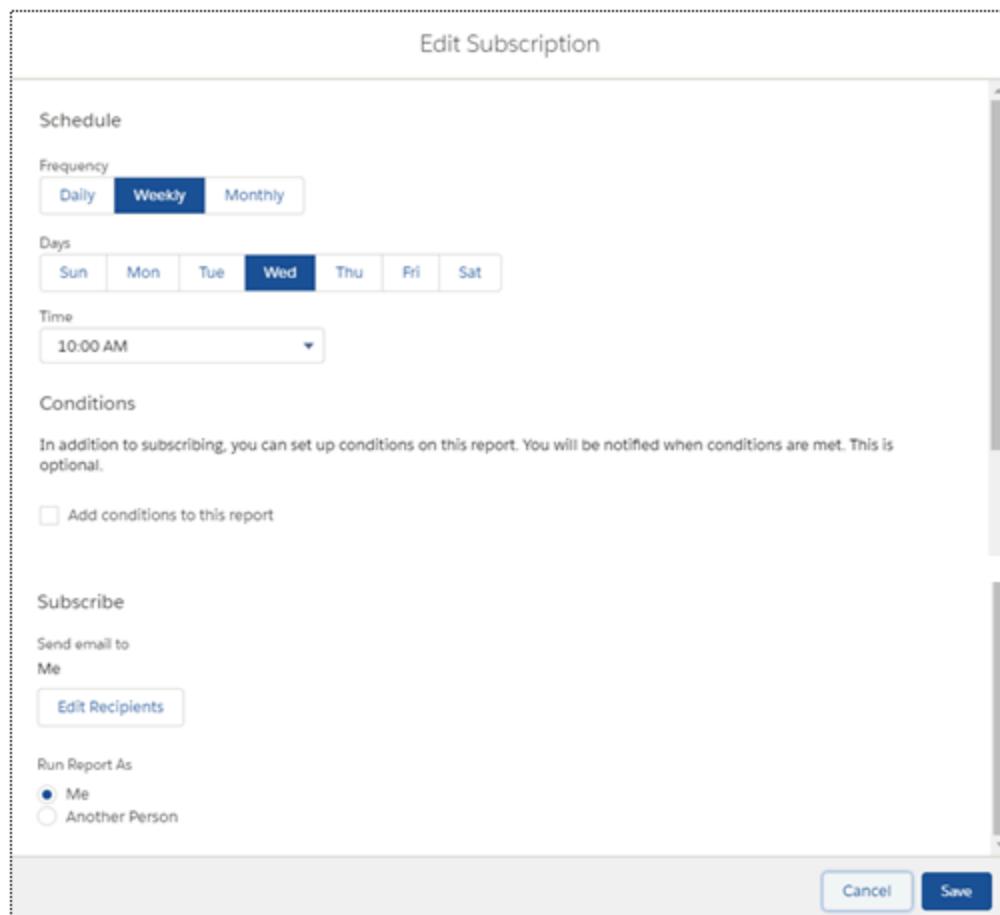
Me

Edit Recipients

Run Report As

Me
 Another Person

Cancel **Save**



- Click Save.

d. Creating Dashboard

- If necessary, create the source reports containing the data you want to display.
- From the Dashboards tab, click New Dashboard.

The screenshot shows the District360 web application interface. At the top, there is a navigation bar with links for Home, Companies, Contacts, Properties, Vacancies, Major Initiatives, Boards, Meetings, Committees, Properties on Map, Reports, and Dashboards. The 'Dashboards' link is highlighted with a yellow box. Below the navigation bar is a search bar and a toolbar with various icons. On the left, a sidebar lists categories: Recent, Dashboards (with 'Recent' selected), Private Dashboards, All Dashboards, Folders (with 'All Folders' selected), Created by Me, Shared with Me, Favorites (with 'All Favorites' selected), and All Favorites. The main content area displays a table of dashboards. The columns are: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. Two items are listed: 'Downtown Sacramento' (Description: Company Dashboards, Created By: Cube84 User, Created On: 8/16/2021, 11:09 PM) and 'Company Performance Dashboard' (Description: Company Dashboards, Created By: Isiah Shingu, Created On: 2/1/2021, 10:17 AM). A 'New Dashboard' button is visible in the top right corner of the main content area.

- Name the dashboard. Optionally, provide a short description. Then, place the dashboard in a folder. Private Dashboards is the default folder.

The screenshot shows the District360 interface with a 'New Dashboard' dialog box open. The dialog has fields for 'Name' (set to 'Downtown Sacramento'), 'Description' (empty), and 'Folder' (set to 'Public folder'). There are 'Select Folder' and 'Cancel' buttons, and a 'Create' button at the bottom. The background shows a grid-based dashboard canvas.

- To add a component to the dashboard, click + Component.
 - a. Choose a source report for the component, then click Select.
 - b. Customize how the component displays data, then click Add.
 - c. Arrange and resize the component as necessary.
 - d. To edit an existing component, click the pencil icon (✏️). To remove a component, click the X icon (✖).

- Click on the add button to add the component. It looks like below

- You can also edit it to change the component type. Click on the pencil icon to edit and change the type. Click on the update button.

After updating, the dashboard looks like below.

- Now click on done to save it. So in this way, we can add multiple components into a single dashboard.

How to create "List Views"

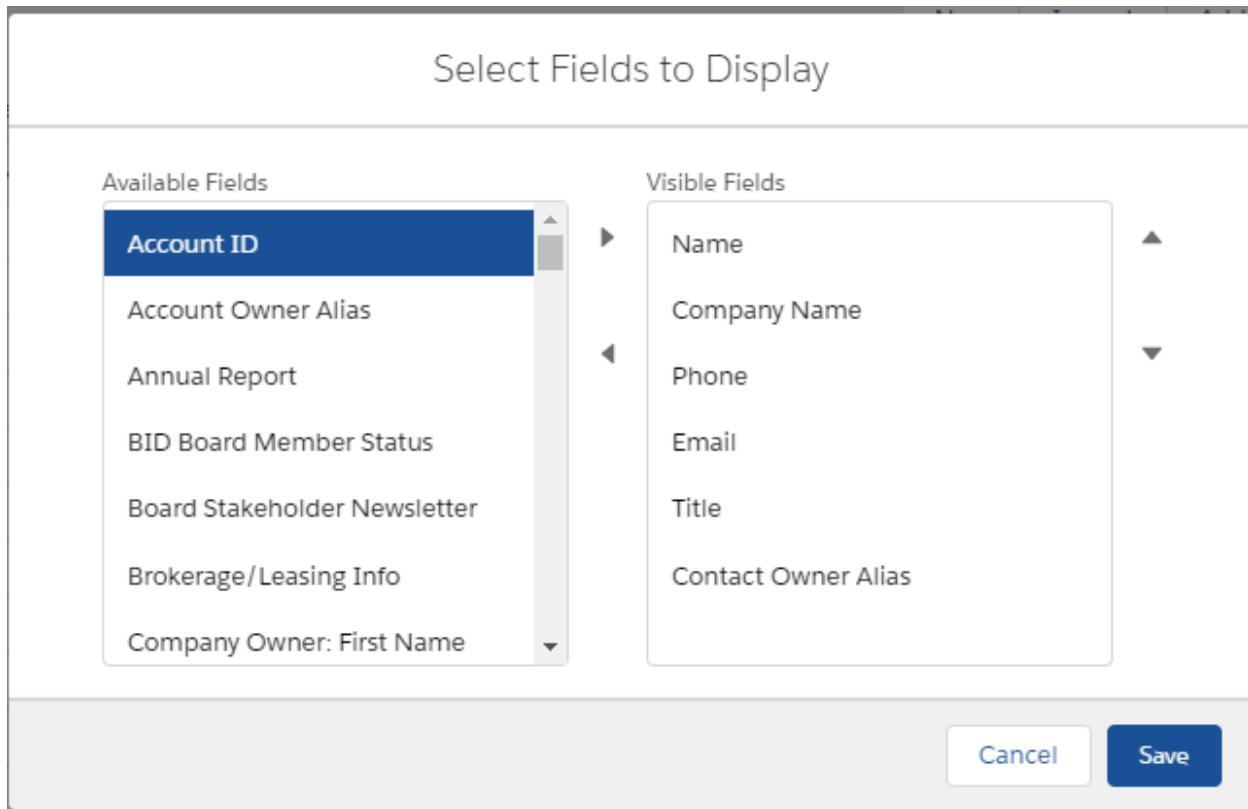
Create a list view to see a specific set of contacts, buildings, or other object records. For example, create a list view of Building on certain blocks or a specific street or Contacts with a specific Parent Business, etc. You can also create views of contacts to use for mass email recipient lists.

1. Click Create New View at the top of any list page or in the Views section of any tab home page. *NOTE If you don't see Create New View, you don't have the "Create and Customize List Views" permission. Contact your Salesforce admin to request it.*
2. Enter the view name. The view name is shown in the views dropdown list.

The screenshot shows the 'New List View' configuration screen. At the top, it says 'New List View'. Below that, there's a field labeled 'List Name' with a red border, followed by the error message 'Complete this field.' Below that is a field for 'List API Name' with a red border. Underneath these fields, there's a section titled 'Who sees this list view?' with three radio button options: 'Only I can see this list view' (selected), 'All users can see this list view', and 'Share list view with groups of users'. At the bottom right, there are 'Cancel' and 'Save' buttons.

3. Enter a unique view name.
4. The unique name must be unused in both public and private list views. Private list views are only searchable if you have access to them.
5. Specify your filter criteria. If you want more filter fields, click Add Filter Logic... and then Add Row. You can have up to 10 fields in your filter criteria.
6. Usually, you filter by additional fields. For example, the image below shows a list view that displays only Properties in the org whose Street name starts with "H."

7. Select the fields you want to display on the list view.
8. The default fields are automatically selected. From the fields that are in your page layout, you can display up to 15 different fields in your view.



9. When you select a long text area field, the list view displays up to 255 characters.
10. Click Save. The view appears in the View dropdown list so you can access it later.

Here's what your list view can look like when you're done:

Filter 1

1. Use "Building Street Name" field
2. Use "Starts with" filter (ie. Building Street name Starts with "H")

User Management

Onboarding New Users:

Setup Users New User

1. Acquire new license
 - a. Assign new user Salesforce license
 - b. Assign new user appropriate Role
 - c. Assign new user appropriate Profile

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar is titled 'Setup' and includes sections for 'Setup Home', 'Lightning Usage', 'Manage Subscription', 'ADMINISTRATION' (with 'Users' selected), 'Data', and 'Email'. The main area is titled 'SETUP Users' and 'New User'. It has tabs for 'User Edit' (Save, Save & New, Cancel) and 'General Information'. The 'Profile' field is highlighted with a red border and has a dropdown menu open, showing options like 'None', 'System Administrator', and 'Standard User'. Other fields visible include First Name, Middle Name, Last Name, Suffix, Alias, Email, Username, Nickname, Title, Company, Department, Division, Role, User License, Marketing User, Offline User, Sales Anywhere User, Flow User, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Debug Mode, Quick Access Menu, Allow Forecasting, Checkout Enabled, and Call Center.

2. Conduct Orientation + Training
 - a. SOP
 - b. 1-on-1 coaching

Off-Boarding Users:

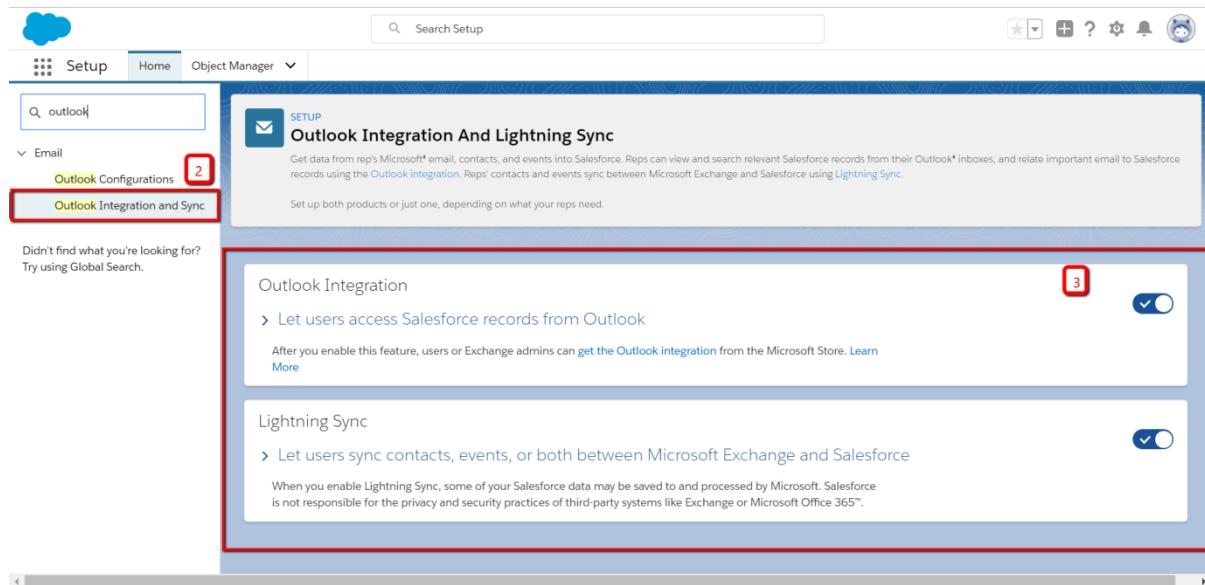
1. Reassign all workflow & cases to another active user
2. Audit + deactivate any scheduled reports
3. Transfer account and contact ownership to another active user
4. Deactivate user

Lightning for Outlook

Enable and Set Up Lightning for Outlook

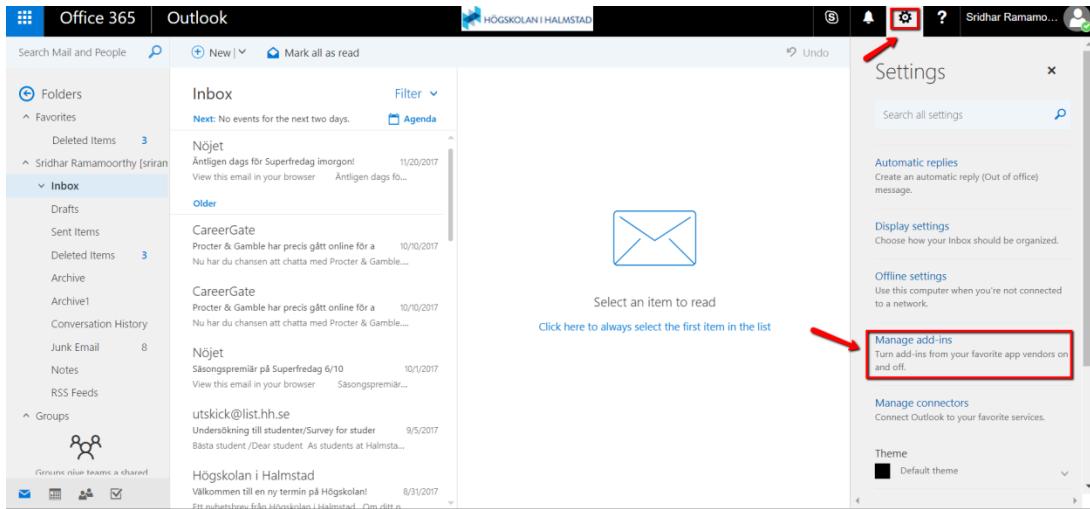
1. Set up Lightning for Outlook from Salesforce

- Click  and select Setup.
- Enter Outlook in the Quick Find box, and then select Outlook Integration and Sync.
- Enable Outlook Integration and Lightning Sync

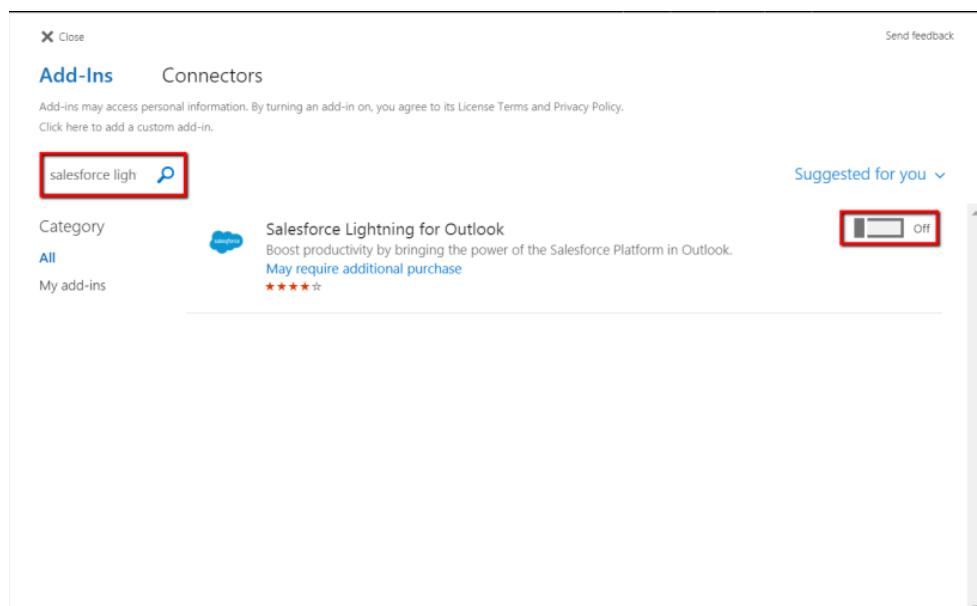


2. Set up Lightning for Outlook in Outlook

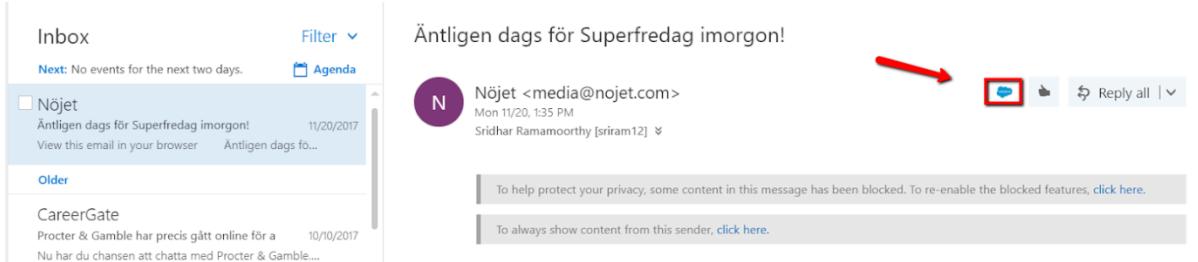
- Before you can begin experiencing Lightning for Outlook, you have to complete these steps to connect Microsoft Outlook Web App (OWA), Outlook 2016, Outlook for Mac 2016, and Outlook 2013.
 1. In the Web browser, type www.outlook.office.com and provide your Microsoft Outlook credentials and log in.
 2. After logging in, click  icon which is available on the right top corner of the screen and navigate to manage add-ins.



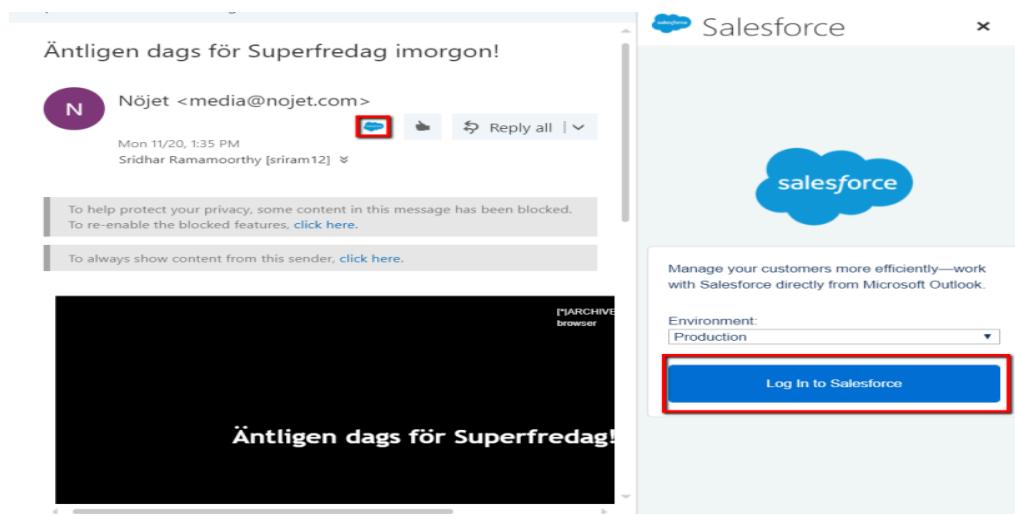
- On the next screen, enter Salesforce lightning for outlook in the Search box, and then hit Turn On.



- After adding Lightning for Outlook to the outlook account and navigating to an inbox, you will notice the Salesforce icon has been created. Click that icon; a windowpane opens on the right side of the screen.



- Enter your Salesforce credentials and allow access to authenticate your Outlook account and Salesforce account.



- After we establish the connection, we can see our Salesforce account data on the pane displayed to the right of the Inbox.

