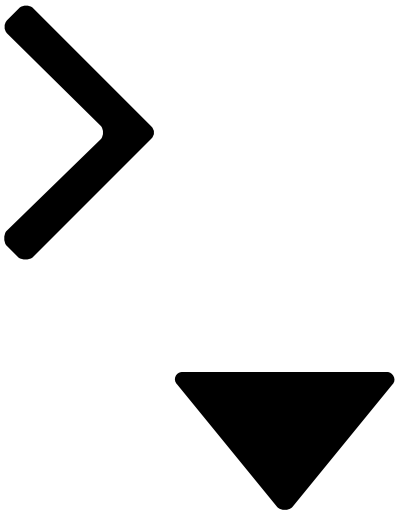
1. Customize an Org to Support a New Business Unit



2. Manage Chatter

Manage Chatter

Introduction

Chatter, Salesforce's enterprise collaboration platform, is a great place for your customer support team to communicate about things such as support cases and tasks. In this corporate social network, they can follow both people and documents, and be a part of public, private, and unlisted Chatter groups to collaborate with their teams and work together on projects.

Follow Account Records

Users need to follow certain records so they can see updates in their Chatter feed, including field changes, posts, tasks, and comments. Show Aaron how to follow an account, then create a case under the record he's following.

These are the instructions Aaron needs in order to follow the Edge Communications account:

1. Click the **App Launcher** and select **Service**.
2. Click **Accounts** and change the view to **All Accounts**.
3. Click **Edge Communications**.
4. Click **Follow** at the top right of the page.

Now create a case on the Edge Communications account:

1. Scroll down to the Cases related list and click **New**.
2. Fill out the Case information with these details:

Field	Value
Case Origin	Email
Type	Electronic

Case Reason	Performance
Subject	`Laptop not working`
Description	`Client new laptop not working`

3. Click **Save**.

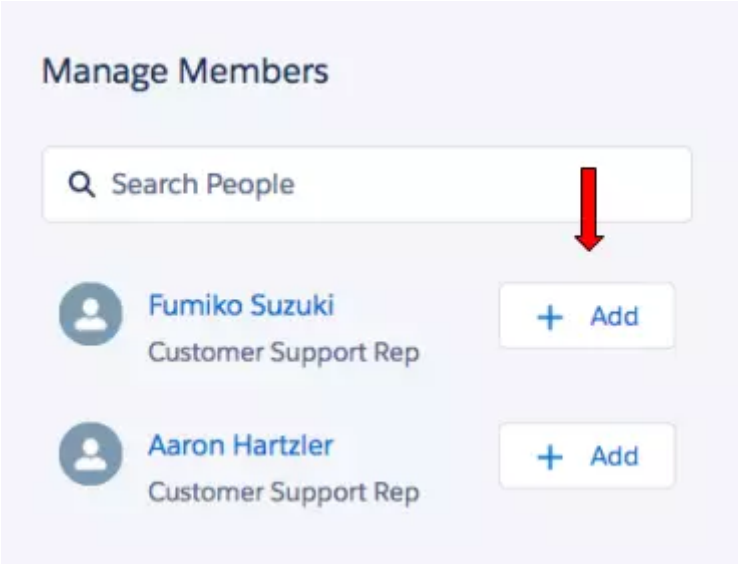
Create a Chatter Group

Next, Aaron would like to have a private Chatter Group for customer support reps for the Edge Communications account to make communication between far-flung team members easier. Here's how to set up that group for him:

1. Click the **App Launcher** and select **Groups** from the list of All Items.
2. Click **New**.
3. Fill in the new group information with these details:

Field	**Value**
Group Name	`Edge Communications Customer Support`
Description	`Collaboration space for Customer Support teams related to Edge Communications`
Access Type	Private
Allow Customers	Select

4. Click **Save & Next**. Skip the Upload Picture section and click **Next**.
5. On the **Manage Members** screen, click **Add** next to Fumiko Suzuki and Aaron Hartzler.
   Note: You may need to search for these users to add them to the Chatter group.



6. Then click **Done**.
7. Where it says **Share an update**, post this message to the group: `Welcome to the Edge Communications Customer Support group. We will use this space to share efficiency and workflow improvement ideas for Edge Communications customer support cases.`
8. Click **Share**.
   Note: You can like or comment on this post.

To get member participation rolling in his new group, Aaron asked you to show him how to post a poll. Here are the instructions:

1. Navigate to Groups, and click **Edge Communications Customer Support**.
2. Click **Poll** to choose the Poll action, and fill out the question and answer fields:

Field	Value
Question	`Are we doing a good job handling Edge Communications customer support inquiries?`
Choice 1	`Yes`
Choice 2	`No`

3. Click **Ask**.

Now that you've completed this step, your customer support team can communicate and collaborate like champs. Move on to the next step in this project and do some customizing.

Assessment Complete!

+100 points

Customize an Org to Support a New Business Unit
100%
Progress: 100%
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