Chatter is a way to collaborate at work. Because status information about people and important projects is automatically pushed to users, Chatter makes it easy to connect with the people and information they care about most.

**Drive Productivity**

Connect, engage, and motivate employees to work efficiently across the organization regardless of role or location. Collaborate on sales opportunities, service Cases, campaigns, and projects.

**Accelerate Innovation**

Provide a forum for anyone to share insights and propose new ideas. Connect teams with direct feedback from customers. Create and share polls instantly to gauge new ideas.

With Chatter, every record in Salesforce, such as an individual account or opportunity record, can be followed. This means that whenever something changes in that record, you’ll be notified instantly. With Chatter, your data talks to you.

Posts can be created manually or automatically by the system when the record is updated. For example, when a Case closes, a Chatter post is automatically posted to the Chatter feed of the owner and anyone who is following that particular Case. This is a good way for a manager to manage a team as they can go into an individual feed and see the work being done.

Reminder: Although Chatter should not be used with customers, you should always be sure that posts and comments are professional and customer-friendly in case they become visible to the customer in the future. Additionally, please note that Chatter posts and comments are reportable at the Council level.

**Duties and Responsibilities for Using Chatter**

All staff users have access to Chatter.

You can post updates in a lot of different places on Chatter, so it’s important that you understand who will see what you post. Posts entered in the status box on your home or profile page will be visible to everyone. Posts entered on a colleague’s profile page will be visible to everyone. Posts to a record (account, opportunity, Case, etc.) or group will be visible only to people with access to that record or group.

Use Chatter to post business-related updates, not what you had for breakfast or saw at the movies last night. A good rule of thumb to keep Chatter business-relevant is to ask yourself if you would mind the CEO or HR team reading your post before you click Submit.

Groups are a great way to share information on particular topics or within specific departments or cross-functional teams. Groups can be completely public and open for everyone to join, or completely private so discussions can be kept confidential.
MAKE A POST FROM HOME OR CHATTER TAB

Objectives of the Business Process

- Make a post to let people know what you are working on, to ask questions, and to share information.
- Engage with co-workers about a topic or a customer inquiry.

Tasks Performed

- Create the post.
- Share the post.

Summary of Recommendations

- Set up your Chatter tab.
- For internal communication not associated with a record, create posts from your Chatter tab (or via Chatter on your home page).
- You can also create a post anytime you see the Chatter feed.

Step-by-Step Instructions

Complete the following steps to make a post from Home/Chatter tab.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From your Home screen or Chatter tab, click Post above your feed, or just click in the text box.</td>
</tr>
</tbody>
</table>
### STEP | ACTION
--- | ---
2. | Type your update in the text box. You can add hashtag topics and mention people.
3. | Below the text box, select **My Followers**, or **A Group** to publish the post on your profile. **My Followers** is the default.
4. | To post to a group, type *part of the group’s* name in the Search Groups field, then select the **group** from the dropdown list. You must be a member of the public or private group you are selecting. The name appears in blue when it is linked correctly. If the name is not blue the group will not be notified of the Chatter post.
STEP | ACTION
--- | ---
5. | To post to an individual, type @, then type the beginning of the person's name (with no space) to get a list of results matching your name criteria. Select the name from the dropdown list.

The name appears in blue when it is linked correctly. If the name is not blue the person will not be notified of the Chatter post.

6. | Click the **Share** icon to share the post.
MAKE A POST FROM A RECORD

Objectives of the Business Process

Make a post to:

• Let people know what you are working on, to ask questions, and to share information.
• Engage with co-workers about a topic or a customer inquiry.

Tasks Performed

• Create the post.
• Share the post.

Summary of Recommendations

• Set up your Chatter tab.
• The steps to Create a Post and Create a Post from a Record are the same, but the screens are different.
• You can create a post anytime you see the Chatter feed.

Step-by-Step Instructions

Create a Post from a Record

Anytime you are creating a post involving a record, you should create the post on the record. You can create posts from the following records:

• Contact
• Account/household
• Case
• Giving
• Campaigns

Complete the following steps to make a post from a record.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Use <strong>Search</strong> (while in Chatter tab) to locate the record.</td>
</tr>
<tr>
<td>2.</td>
<td>Above your feed, click <strong>Post</strong> (or just click the text box).</td>
</tr>
<tr>
<td>3.</td>
<td>Type <strong>your update</strong> in the text box. You can add hashtag topics and mention people.</td>
</tr>
<tr>
<td>4.</td>
<td>Below the text box, select <strong>Girl Scouts of the USA Only</strong>.</td>
</tr>
<tr>
<td>5.</td>
<td>Click <strong>Share</strong>.</td>
</tr>
</tbody>
</table>
Create a Post from Chatter

**STEP** | **ACTION**
---|---
1. | Access the **Chatter** tab.
2. | Above your feed, click **Post** (or just click the text box).
3. | **Type your update** in the text box. You can add hashtag topics and mention people.
4. | Below the text box, select **My Followers** to publish the post on your profile. OR Select a **Group**. (Type part of the group’s name in the Search Groups field, then select the Group from the dropdown list. You can only select a public group or a private group that you are a member of.)
5. | Click **Share**.
CHAPTER: CHATTER  
SECTION: MAKE A POST FROM RECORD

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
</table>

[Image of a screenshot from Salesforce interface showing a post being made from a record.]

**Girl Scouts**

Post

Type a user’s or a group’s name to notify them about this update.

To My Followers

Recommendations

Christine Talk changed Title from TRAINER to IPS TRAINER.

Comment: Like - January 15, 2015 at 1:02 PM

Christine Talk changed Manager from a blank value to Ari GSIntegral Ack.

Comment: Like - January 15, 2015 at 8:58 PM

Get The Salesforce1 App

Take Salesforce with you everywhere! Download the new Salesforce1 Mobile App from the Apple App Store and Google Play.

Kynzlee Bourassa

Recently viewed by you

Follow

GSRV Inside Recruitment
DELETE A POST

Objectives of the Business Process

If you make an incorrect post or need to make an edit or an adjustment, you can delete your own posts. Also, you can delete posts other people made on your profile.

Tasks Performed

Delete a post.

Summary of Recommendations

If you delete a post that has additional comments, all of the other comments will be deleted as well.

Step-by-Step Instructions

Complete the following steps to delete a post.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>To the right of the post, click the <strong>arrow</strong> to expand the dropdown menu.</td>
</tr>
<tr>
<td>2.</td>
<td>To delete the post and all its comments, select <strong>Delete</strong>.  &lt;br&gt;<strong>Note:</strong> When you delete a post that includes a file, you are not deleting the file, just the reference to the file. The file remains in its original location.</td>
</tr>
<tr>
<td>3.</td>
<td>Click <strong>OK</strong>.</td>
</tr>
</tbody>
</table>
### Step 1: Action

**Delete a Post**

1. **Delete a post**
   - Click to view options.
   - Click on the trash can icon to delete the post.

2. **Confirm deletion**
   - A confirmation message will appear.
   - Click **OK** to confirm the deletion.

### Dashboard

- As of 1/2/2015, 10 AM, displaying data as Cherie Balliett.

### Council Girl Grade Composition
- Council Girl Grade Membership
- Council Girl Grade Membership

---

**Chatter: Delete a Post**

v.4/16/2015
FOLLOW AN INDIVIDUAL, FILE, OR RECORD

Objectives of the Business Process

• To receive notifications anytime an individual you are following creates a post or makes a comment.
• To receive updates when any changes are made to the file or record.

Tasks Performed

• To receive updates on a file, record, or individual, click the Follow icon.
• To stop receiving updates, click the X icon to the right of the Follow icon.

Summary of Recommendations

• You should always follow your manager.
• Managers should always follow their direct reports.

Step-by-Step Instructions

Follow an Individual

Complete the following steps to follow an individual.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Go to Chatter tab.</td>
</tr>
<tr>
<td>2.</td>
<td>Click People in the left navigation pane.</td>
</tr>
<tr>
<td>3.</td>
<td>Search for the individual.</td>
</tr>
<tr>
<td>4.</td>
<td>In the search results, click the Follow icon to the right of their name.</td>
</tr>
</tbody>
</table>
Follow a File

Complete the following to follow a file.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Go to the Chatter tab.</td>
</tr>
<tr>
<td>2.</td>
<td>Click Files in the left navigation pane.</td>
</tr>
<tr>
<td>4.</td>
<td>In the search results, click the Follow icon to the left of the file name.</td>
</tr>
</tbody>
</table>
Follow a Record

Complete the following steps to follow a record.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Open and locate the record file.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Follow</strong> icon to the right of the Chatter feed.</td>
</tr>
</tbody>
</table>
Unfollow a Record

Complete the following to unfollow a record.

1. Click the X icon next to the Following icon.
CREATE A CHATTER GROUP

Objectives of the Business Process

Chatter groups make collaboration easier and can be used to engage team members.

- Used only for internal communication and are a great way to highlight questions or move work through the system.
- Reduce email and can take project management to another level.
- Great way to keep up with your team.
- Chatter groups can either be public for all licensed users or private for selected people.

Tasks Performed

- Create a Group
- Add Members

Step-by-Step Instructions

Complete the following steps to create a Chatter group.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the Chatter tab.</td>
</tr>
<tr>
<td>2.</td>
<td>Click Groups from the left navigation pane.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the New Group button.</td>
</tr>
<tr>
<td>4.</td>
<td>In the Group Name field, type a name for the Chatter group. Be sure all group names start with your Council initials.</td>
</tr>
</tbody>
</table>
### Create a Chatter Group

**5.** The Owner defaults to the person who is creating the group. The owner is the moderator. Link to Moderating a Group process.

**6.** In the **Description** field, type a description that indicates the use of the group; for example, the specific project or team.

**7.** In the **Automatic Archiving** field, insert local business practice for archiving. Some Councils have decided to always select **Don’t automatically archive this group**, and assign the responsibility of managing and archiving groups to the Data Admin.
8. In the Group Access section, select the Public radio button.
   - If you have a need for a Private group at your Council, manager approval is required.
   - Never select the Allow Customers check box as this would allow the group to be visible to the general public.

9. Click Save.

10. The Chatter group page appears. Click Add Members link.
    IMPORTANT: Do not use the Invite People link.
11. Search for the member(s) you want to add.

12. Click **Add**.
   A system-generated email is automatically sent to the member indicating that they have been added to the group.

13. Click the **Done** button.
SEARCH A CHATTER FEED

Objectives of the Business Process

Search All Chatter Feeds for specific posts; can be used to search for content.

Tasks Performed

Search all Chatter feeds for specific posts; can be used to search for content in your Chatter feed, group Chatter feed, or record Chatter feed.

Step-by-Step Instructions

Complete the following steps to search for a Chatter feed.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>magnifying glass</strong> located under the Chatter comment box.</td>
</tr>
<tr>
<td>2.</td>
<td>Enter specific search keywords.</td>
</tr>
<tr>
<td>3.</td>
<td>Press <strong>Enter</strong> on your keyboard.</td>
</tr>
</tbody>
</table>
EDIT PROFILE FOR OUT OF OFFICE

Objectives of the Business Process

Modify Chatter profile so that other users know when you are out of office.

Tasks Performed

- Update Chatter profile picture to the Out of Office picture
- Update personal info to reflect your out of office dates, and whom to contact for urgent matters.

Step-by-Step Instructions

Complete the following steps to update your Chatter profile picture and personal information to reflect your out of office dates.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Search the internet for an out-of-office thumbnail image, and save it to your computer.</td>
</tr>
<tr>
<td>2.</td>
<td>Navigate to the Home tab in Salesforce.</td>
</tr>
<tr>
<td>3.</td>
<td>Click on your name to be taken to your user profile.</td>
</tr>
</tbody>
</table>
4. Hover your mouse over your picture, then click **Update**.

5. Click the **Browse** button, search for the image you saved, and then click **Save**.

6. Adjust the image size if necessary, then click **Save**.
7. In the Chatter profile page, click the **Overview** tab.

8. Double-click the **pencil icon** under the Knowledgeable About section.

9. In the About Me field, **add details** about your out of office dates and whom to contact for urgent matters.

10. Click **Save All**.

    NOTE: You will need to change your profile picture back to the original picture, and delete the Out of Office details listed upon your return.
ATTACH FILES, LINKS, AND POLLS

Objectives of the Business Process

- Attaching a file or link allows you to share external content.
- All users can create polls to engage other users around a discussion topic or a particular project.

Summary of Recommendations

Files can be attached to posts and comments. Links and polls can only be attached to posts.

Step-by-Step Instructions

Attach a File

Complete the following steps to attach files.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
</table>
| 1.   | When creating a Chatter post, click the **File** icon.  
|      | a. If you are attaching a file to a comment, click Attach File. |
| 2.   | Click either **Select a file from Salesforce** or **Upload a file from your computer**. |
### 3a. Upload a file from your computer

If **Upload a file from your computer** is selected, you will see the following screen. Navigate to and select the file from your computer.

- The file(s) appears next to **Choose File**.
- There is a size limit to the file, and multiple files can be loaded to one post following size limitations. The maximum file size limit is 2G.

Keep in mind that sharing files in Salesforce is not a form of document management.

### 3b. Select a file from Salesforce

When you choose **Select a file from Salesforce**, the following screen pops up.

- Use search box to find the file.
- Search results will populate on screen.
<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>In the text field, make comments related to the post and file.</td>
</tr>
</tbody>
</table>
| 5.   | Below the text box, select **My Followers** to publish the post on your profile.  
      OR  
      Select **A Group**. (Type part of the group’s name in the Search Groups field, then select the group from the dropdown list. You must be a member of the public or private group you select.) |
| 6.   | Click **Share**. |
Attach a Link

Complete the following to attach a link.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>When creating a Chatter post, click the <strong>Link</strong> icon.</td>
</tr>
<tr>
<td>2.</td>
<td>In the <strong>Link URL</strong> field, type or copy/paste the URL.</td>
</tr>
<tr>
<td>3.</td>
<td>In the <strong>Link Name</strong> field, type the name of the URL.</td>
</tr>
</tbody>
</table>
4. In the text field, make comments related to the post and link.

5. Below the text box, select My Followers to publish the post on your profile.
   OR
   Select A Group. (Type part of the group’s name in the Search Groups field, and select the group from the dropdown list. You must be a member of the public or private group you select.)

6. Click Share.
**Attach a Poll**

Complete the following to attach a poll.

<table>
<thead>
<tr>
<th><strong>STEP</strong></th>
<th><strong>ACTION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>When creating a Chatter post, click the Poll icon.</strong></td>
</tr>
<tr>
<td>2.</td>
<td><strong>In the What would you like to ask? text box, type a question.</strong></td>
</tr>
</tbody>
</table>
3. In the **Choice** fields, type answer options. If you need additional Choice fields, click the **Add more choices** link.

4. Below the text box, select **My Followers** to publish the poll on your profile. OR Select **A Group**. (Type part of the group’s name in the Search Groups field, and select the group from the dropdown list. You must be a member of the public or private group you select.)

5. Click **Share**.
MENTION PEOPLE OR GROUP IN POST OR COMMENT

Objectives of the Business Process

Mentioning individual people or a group is a way to keep them informed when you’re discussing something relevant to them.

After you post your update:

- The person’s name becomes a link to their profile, and the group name becomes a link to the group page.
- For people you mention, your update appears on their personal Chatter feed, as well as under the “To Me” section on the Chatter feed.
- Chatter sends an email notification to people you mention.
- For groups you mention:
  - Your update appears on the group feed and each group member’s What I Follow feed.
  - Chatter sends an email notification to the group members who enabled the Email Every Post preference for the group.

Step-by-Step Instructions

Complete the following steps to mention people or group in a post or comment.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>When writing a post, type @ followed by the first few letters of the person or group name.</td>
</tr>
<tr>
<td>2.</td>
<td>Select the person or group from the list of matches. The list includes all matches for:</td>
</tr>
<tr>
<td></td>
<td>• People, including people you don’t follow.</td>
</tr>
<tr>
<td></td>
<td>• Public groups.</td>
</tr>
<tr>
<td>STEP</td>
<td>ACTION</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Share</strong> button to post your update.</td>
</tr>
</tbody>
</table>

**NOTE:** You can have up to 25 mentions in a single post or comment. You can't mention archived groups, unlisted groups, customer groups, and private groups if you are not a member of the group.