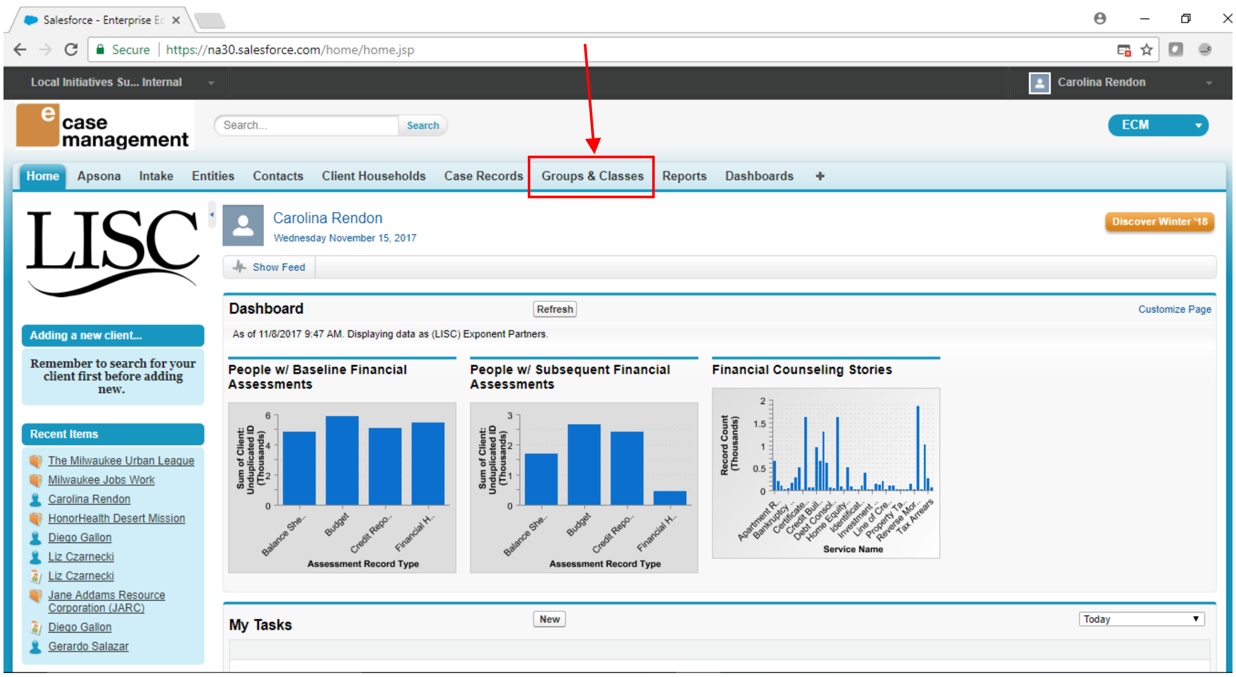
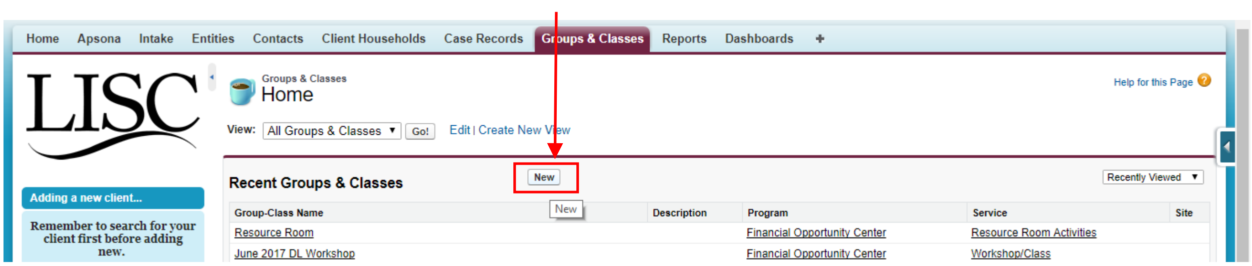
Salesforce Guide- Creating Groups and Classes--------Updated 3/25/2020

This is a guide that will walk you step by step through how to create workshops and classes in Salesforce. Groups & Classes workshops are the only way to track digital literacy but it can also be used to track attendance in employment, financial and vocational workshops as well as use of a resource room or bulk group entry of work/ education supports.

1. Click on the Groups & Classes tab on the top of the main page.



2. A list of all Groups & Classes that already exist will appear. You can click on any to edit or select **NEW**.



3. Group Name-Here you will name your group/ class or workshop. Best practice would be to have a uniform naming structure in your organization. Ask your supervisor first to learn if one already exist.

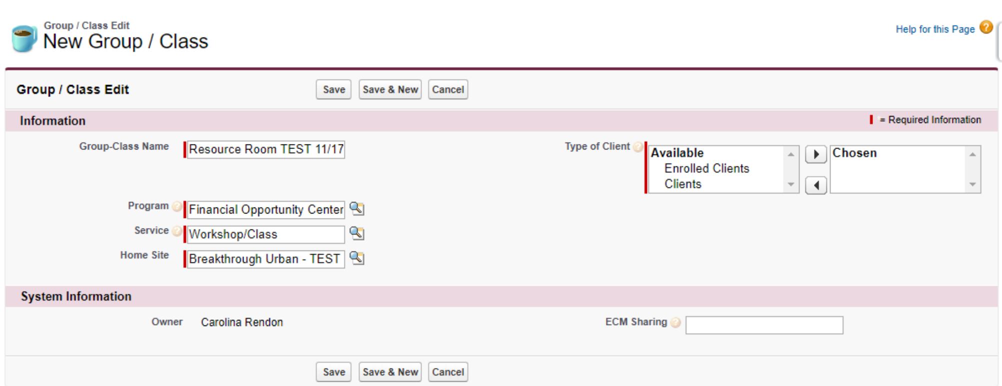
   (ex. Program code_Month_Intials)

   Program: This will usually be "**Financial Opportunity Center**"
   Service: Select either **Workshop/class**, **Resource Room Activities**, or **Work/education Support**

   For Accenture workshop tracking please user "**Workshop/Class**"

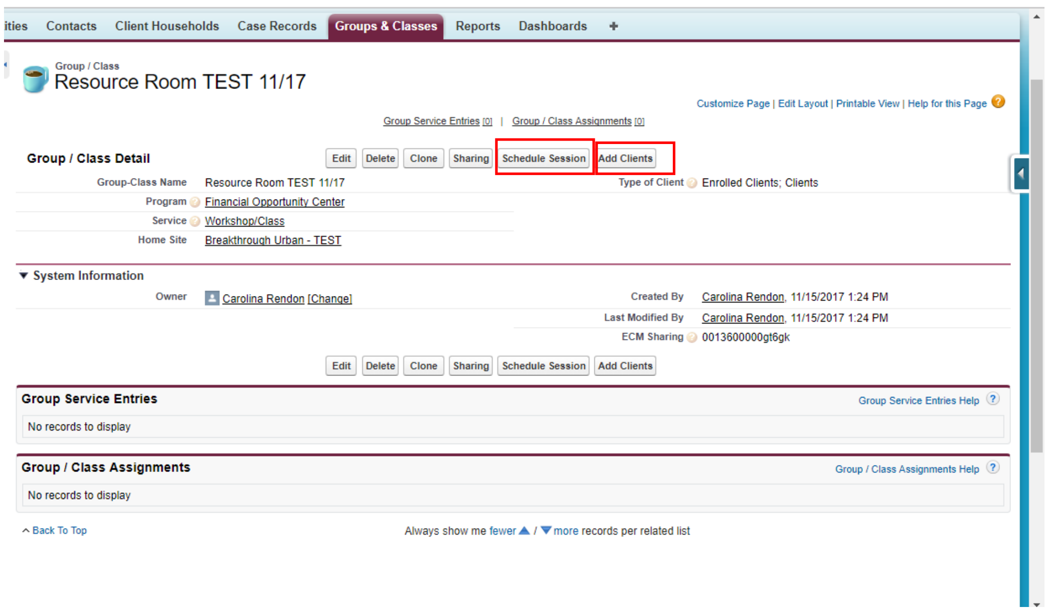
   Home Site: Your home site name here

Type of Client: Enrolled Clients are clients that are enrolled and have a case record in the FOC program. Clients do not have an FOC case record, this may include people who dropped into the class but have not been enrolled into the FOC. It is recommended that you only use groups/classes to track FOC enrolled clients.



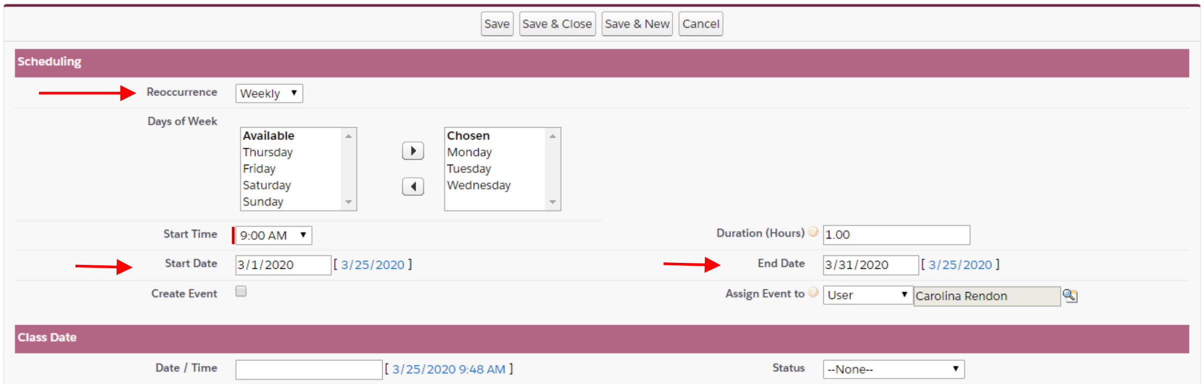
SAVE

4. After you save, you will see your main screen for the group/class you have just created. Now you will want to **Schedule Classes**, **Add Clients** and **Record Attendance**.

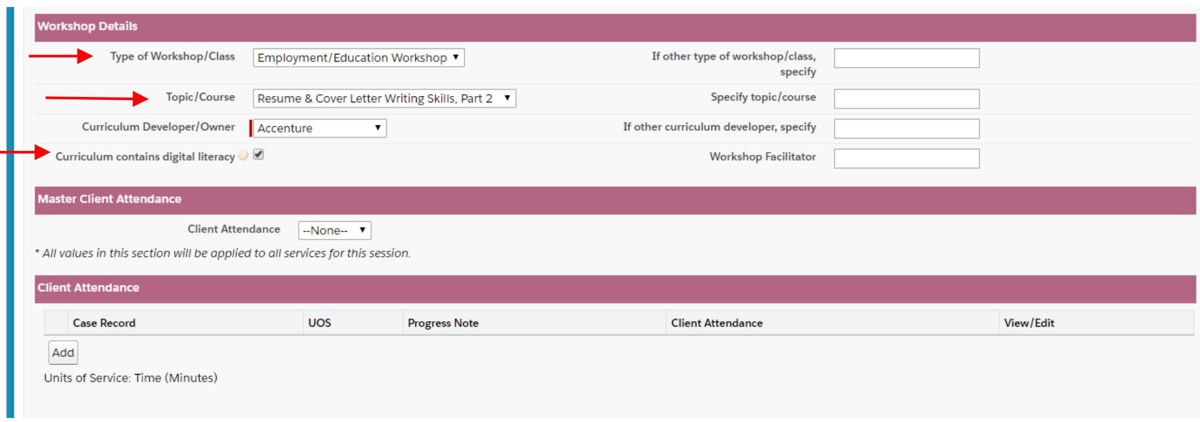


Schedule sessions

5. Click on Schedule session on the main group screen. Here you can schedule classes that have passed or in the future.
    a. The reoccurrence option will allow you to easily schedule multiple classes that repeat weekly or monthly or example.
    b. Select a start and end date for your reoccurring class
    c. Choose Type of class, ex. Digital literacy or Financial workshops
    d. Choose Topic/Class. If your topic changes every week, select any and you will be able to edit individual classes later
    e. If your workshop contains any digital literacy skills lessons, please check off "curriculum contains digital literacy"; Ex. A Financial workshop on "Banking" may discuss "Online Banking" and show clients how that works or an Employment workshop on "Resume Writing" may also be an "Introduction to Microsoft word"



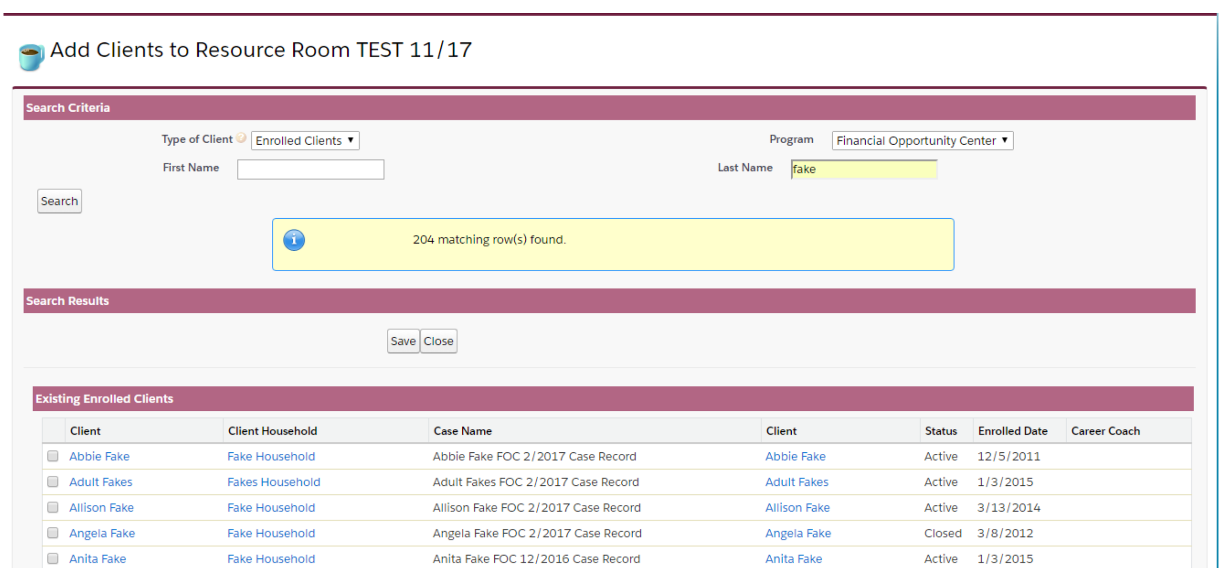
All can be edited later



SAVE

Add Clients

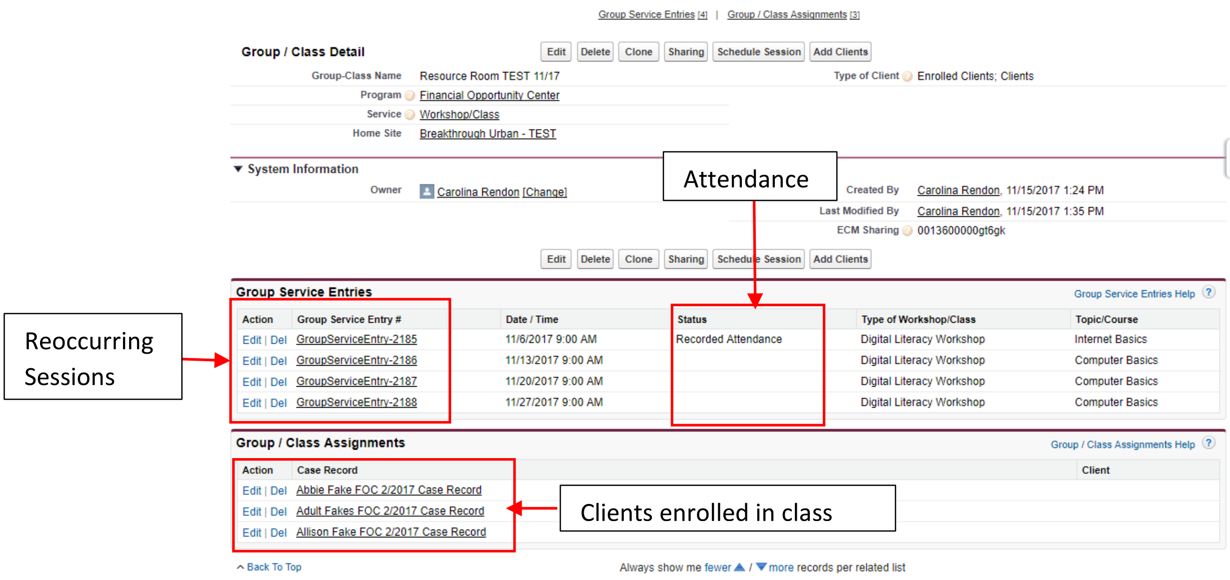
6. Now that your classes are scheduled you can add students who are enrolled in the class by clicking **ADD Client** on the main screen.
   a. Select *Type of client (Enrolled or client)* and select program *Financial opportunity center*
   b. Search by first/ last name or both and select and save clients into group.
      *** Remember to click save before you move on to a new search.



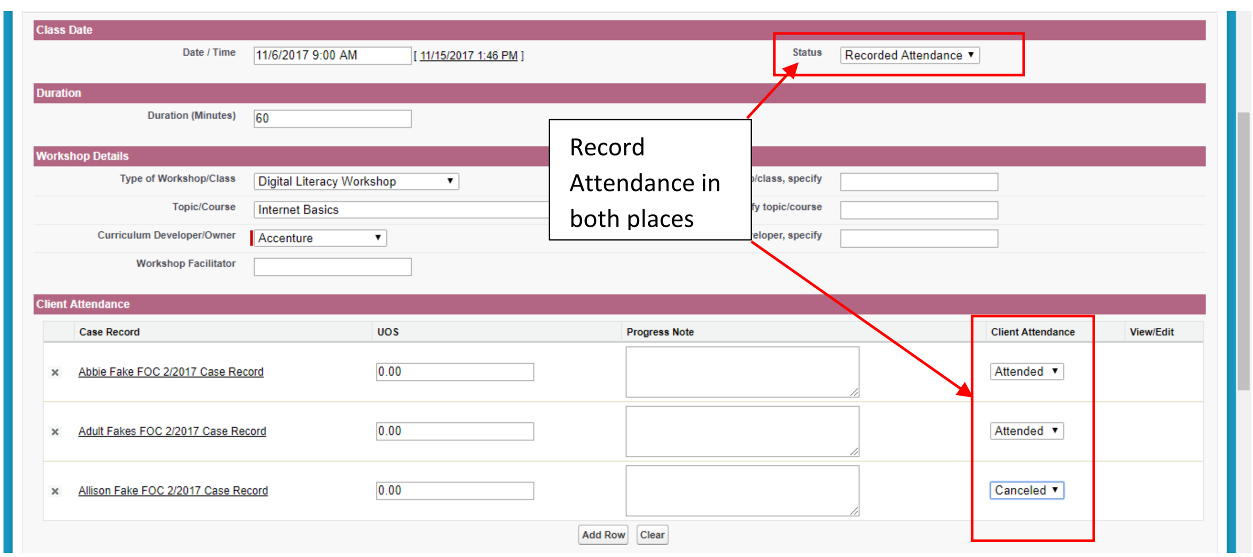
Select and SAVE; Close

Editing & Recording Attendance

7. When you return back to the main screen for your group, you will see all of your reoccurring sessions and clients enrolled in the class. Select edit on any individual session to record attendance or edit the topic.



8. When recording attendance always remember to change the **Status,** and record each individual client's attendance. You should not delete a client if they did not attend that particular class as there is an option under *client attendance* to select *"No Show".*



You have now learned how to create a group/class, schedule session, add clients and record attendance.