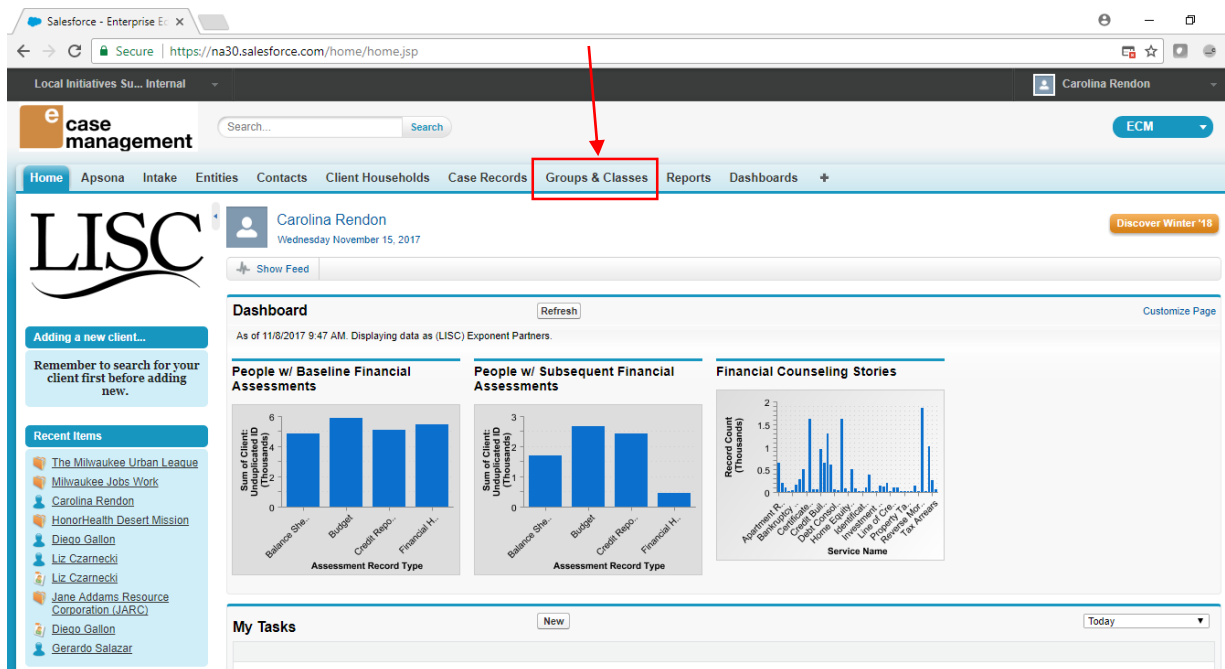


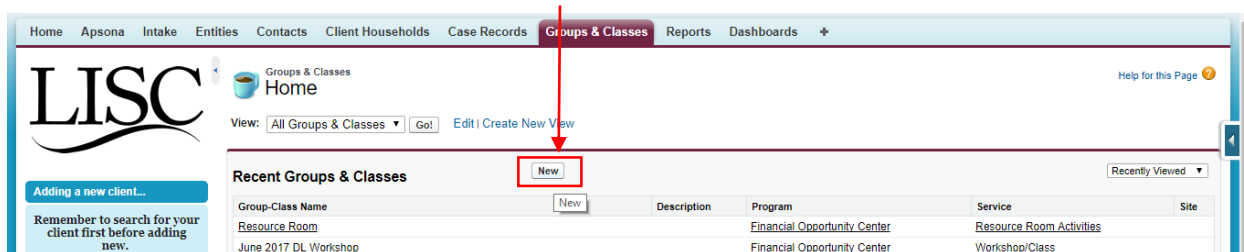
Salesforce Guide- Creating Groups and Classes-----Updated 3/25/2020

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 recurrence 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 recurring 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"

Save Save & Close Save & New Cancel

Scheduling

Reoccurrence: Weekly

Days of Week:

Available	Chosen
Thursday	Monday
Friday	Tuesday
Saturday	Wednesday
Sunday	

Start Time: 9:00 AM

Duration (Hours): 1.00

Start Date: 3/1/2020 [3/25/2020]

End Date: 3/31/2020 [3/25/2020]

Create Event: ☐

Assign Event to: User Carolina Rendon

Class Date

Date / Time: [3/25/2020 9:48 AM]

Status: --None--

Workshop Details

Type of Workshop/Class: Employment/Education Workshop

If other type of workshop/class, specify:

Topic/Course: Resume & Cover Letter Writing Skills, Part 2

Specify topic/course:

Curriculum Developer/Owner: Accenture

If other curriculum developer, specify:

Curriculum contains digital literacy: ☒

Workshop Facilitator:

Master Client Attendance

Client Attendance: --None--

* All values in this section will be applied to all services for this session.

Client Attendance

Case Record	UOS	Progress Note	Client Attendance	View/Edit
Add				

Units of Service: Time (Minutes)

All can be edited later

SAVE

Add Clients

- Now that your classes are scheduled you can add students who are enrolled in the class by clicking **ADD Client** on the main screen.
 - Select *Type of client (Enrolled or client)* and select program *Financial opportunity center*
 - 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.

Add Clients to Resource Room TEST 11/17

Search Criteria

Type of Client: Enrolled Clients

Program: Financial Opportunity Center

First Name:

Last Name: fake

Search

204 matching row(s) found.

Search Results

Save Close

Existing Enrolled Clients

Client	Client Household	Case Name	Client	Status	Enrolled Date	Career Coach
<input type="checkbox"/> Abbie Fake	Fake Household	Abbie Fake FOC 2/2017 Case Record	Abbie Fake	Active	12/5/2011	
<input type="checkbox"/> Adult Fakes	Fakes Household	Adult Fakes FOC 2/2017 Case Record	Adult Fakes	Active	1/3/2015	
<input type="checkbox"/> Allison Fake	Fake Household	Allison Fake FOC 2/2017 Case Record	Allison Fake	Active	3/13/2014	
<input type="checkbox"/> Angela Fake	Fake Household	Angela Fake FOC 2/2017 Case Record	Angela Fake	Closed	3/8/2012	
<input type="checkbox"/> Anita Fake	Fake Household	Anita Fake FOC 12/2016 Case Record	Anita Fake	Active	1/3/2015	

Select and SAVE; Close

Editing & Recording Attendance

- 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.

The screenshot shows the 'Group / Class Detail' screen. At the top, there are tabs for 'Group Service Entries (4)' and 'Group / Class Assignments (3)'. Below this, the 'Group / Class Detail' section includes fields for 'Group-Class Name' (Resource Room TEST 11/17), 'Program' (Financial Opportunity Center), 'Service' (Workshop/Class), and 'Home Site' (Breakthrough Urban - TEST). A callout box labeled 'Attendance' points to the 'Status' column in the 'Group Service Entries' table. Another callout box labeled 'Reoccurring Sessions' points to the 'Group Service Entries' table. A third callout box labeled 'Clients enrolled in class' points to the 'Group / Class Assignments' table.

Action	Group Service Entry #	Date / Time	Status	Type of Workshop/Class	Topic/Course
Edit Del	GroupServiceEntry-2185	11/6/2017 9:00 AM	Recorded Attendance	Digital Literacy Workshop	Internet Basics
Edit Del	GroupServiceEntry-2186	11/13/2017 9:00 AM		Digital Literacy Workshop	Computer Basics
Edit Del	GroupServiceEntry-2187	11/20/2017 9:00 AM		Digital Literacy Workshop	Computer Basics
Edit Del	GroupServiceEntry-2188	11/27/2017 9:00 AM		Digital Literacy Workshop	Computer Basics

Action	Case Record	Client
Edit Del	Abbie Fake FOC 2/2017 Case Record	
Edit Del	Adult Fakes FOC 2/2017 Case Record	
Edit Del	Allison Fake FOC 2/2017 Case Record	

- 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".

The screenshot shows the 'Client Attendance' screen. At the top, there are fields for 'Class Date' (Date / Time: 11/6/2017 9:00 AM), 'Duration' (Duration (Minutes): 60), and 'Workshop Details' (Type of Workshop/Class: Digital Literacy Workshop, Topic/Course: Internet Basics). A callout box labeled 'Record Attendance in both places' points to the 'Status' dropdown menu and the 'Client Attendance' table. The 'Status' dropdown menu is set to 'Recorded Attendance'. The 'Client Attendance' table has columns for 'Case Record', 'UOS', 'Progress Note', 'Client Attendance', and 'View/Edit'.

Case Record	UOS	Progress Note	Client Attendance	View/Edit
Abbie Fake FOC 2/2017 Case Record	0.00		Attended	
Adult Fakes FOC 2/2017 Case Record	0.00		Attended	
Allison Fake FOC 2/2017 Case Record	0.00		Canceled	

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