

Getting Started Using Salesforce

Prepared for:



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This document was developed for internal use of Michigan Works!



Navigating in Salesforce

Introduction

Salesforce is a cloud-based platform that helps manage business relationships. The MWA Salesforce has been customized for Business Services purposes specific to Michigan Works! agencies, and is not an “out-of-the box” product.

This Getting Started Training Manual is designed to give you an introduction and overview to key functionality and navigation within the system. This manual is general in nature; all users should follow their own organizational policies and procedures for data entry. Because Salesforce is widely used around the world, you may find training videos and manuals online but those will not be specific to the Salesforce you are using.

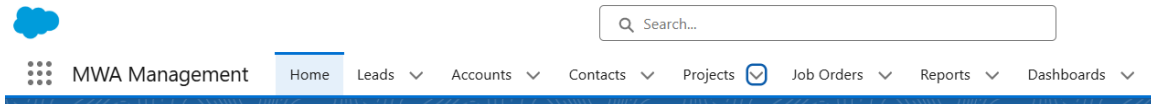
If you have questions about how to use the system, check in with your organization Salesforce Champion first. If there are issues, the Salesforce Champion will contact the MWA Salesforce Administrator for additional assistance.



Terminology

Here are some general terms that serve as the backbone Salesforce:

- ❖ **Tab**—navigational elements to access specific data and functions within Salesforce.



- ❖ **Lead**—a lead is someone (a contact or account) that you haven't done significant work for yet. For example, this might be just a business card you collected at a job fair or outreach event. Since the relationship hasn't been built yet, you could enter these as Leads then convert them later to full Accounts or Contacts. *Be sure to check with your Salesforce Champion at your organization to determine if Leads are being used*
- ❖ **Accounts**- are employers and partner organizations you work with. This is the PARENT record for everything in SF. All contacts, projects, and job orders must relate back to an Account.
- ❖ **Contacts**— are the individuals that you work with at each employer or partner organization, i.e. Human Resources Manager, CEO, Plant Manager, etc. You can have multiple contacts for each account.
- ❖ **Activities**—log emails, calls, or visits with Accounts here. You can also create a TASK and delegate action in the future to either yourself or another Salesforce user.
- ❖ **Projects**- is where all business service activities are captured. These services are broken into "record types" which dictate the information you need to enter into SF.
 - **Training Services**
 - **Apprenticeship Program Outreach**
 - **Apprenticeships & Internships**
 - **Going Pro Apprenticeship**
 - **Going Pro Talent Fund**
 - **Hiring Services**
 - **Rapid Response**



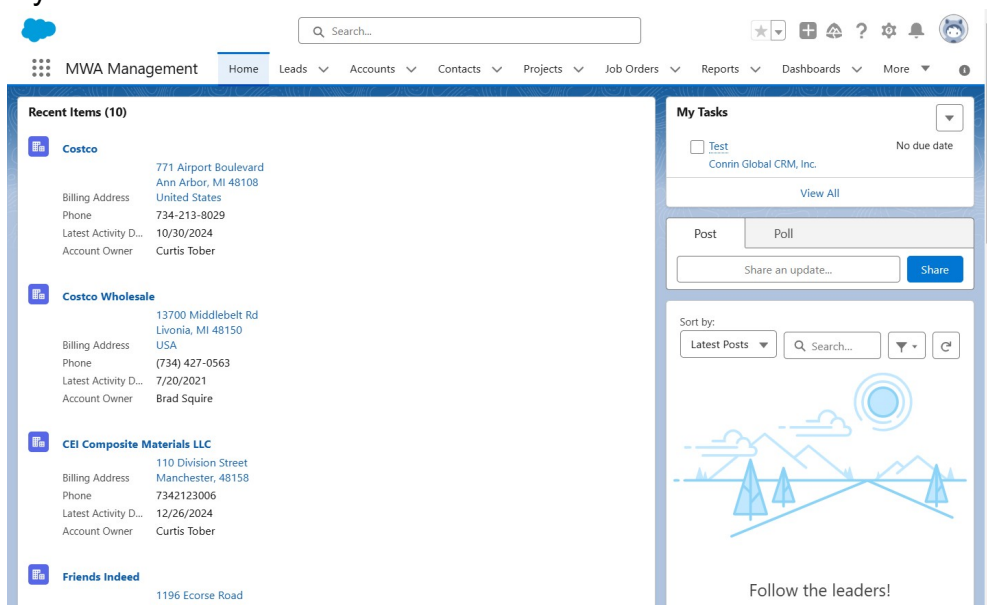
- ❖ **Job Orders**— use to capture job orders that you place for employers on the PMTC.
 - o The difference between a PROJECT and JOB ORDER is that the job order is just the service of a job order. If you want to track the services you provided to an employer to fill a specific job, you would want to use PROJECT. Using the JOB ORDER tab allows you to track what you are doing in PMTC here in SF and run reports
- ❖ **Dashboards**—These are quick views of charts and graphs that run off the reports that you have created. It can be a quick and easy way for your team to track goals and performance measurements.

Navigation

Upon logging into Salesforce, you will land on the Home tab.

This tab acts as a dashboard and will show you the 10 most recent items you have reviewed. On the right side of the window, you will also see “Today’s Tasks”. Tasks that were initiated either by you or someone else will show up on this list if they are due TODAY. The arrow button in the top right of that window will allow you to change the filter for what Tasks you see. The options are: Today, My Tasks, All Overdue, Completed in the last 7 days, and Delegated Tasks. __is Mission Control for your Salesforce.com (SF) instance.

Any text that is blue in Salesforce is a hyperlink, clicking on it will take you directly to that record.



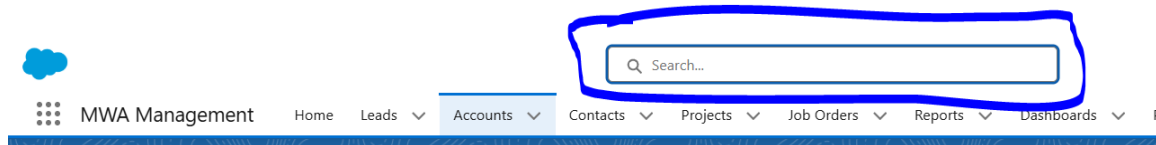


Clicking on a Tab in the Navigation Bar will take you to that tab's landing page. Here you will be able to view a list of recently viewed accounts or you can even create a customized list to find information more quickly. These lists are like one-dimensional reports without having to create a report. You will learn later in this manual how to create a list.

There are many ways to navigate through Salesforce to enter and edit data. In the next section, we will discuss general data entry.

Best Practice—USE the Global Search Bar

Before creating new records in Salesforce, especially Accounts or Contacts, use the Global Search Bar to search for records.



The Global Search Bar will show 5 possible results as you begin typing your search. This is an expedited search.



If there are records that match your search criteria, a list will pop up below the search bar.

A screenshot of a Salesforce search interface. At the top, a search bar contains the text "Search: All" and "Costco". Below the search bar, a list of search results is displayed. The first result is "Costco accounts", followed by "Costco Wholesale accounts", and "Costco tasks". Below these, a list of account records is shown, including "Costco" (Account • 734-213-8029), "Costco Wholesale" (Account • (734) 427-0563), "Costco Southfield" (Account • 323-972-6179), "Costco" (Account • (248) 648-0020), and "Costco Wholesale" (Account • (616) 406-2651). To the right of the search results, a detailed view for the "Costco Wholesale" account is shown. This view includes a "Follow" button, a "Printable View" button, and a list of related information: Phone (734) 427-0563, Account Owner Alias bsqui, Billing City Livonia, MI County Wayne, and Created Date 10/10/2018 12:33 PM. On the far right, a "Related List Quick Links" section provides links to various related records: Activity History (10+), Contacts (1), Open Activities (0), Projects (0), Job Orders (1), Partners (0), Notes (0), Files (0), and Account History (0).

Hovering over the search results will create a window to the right that will detail additional information about that record. This should help determine if the record is already created in Salesforce. Click on the Name of the record to go to the record's page. Or use the Related List Quick Links to quickly navigate to records related to the record.

If you click enter when using the Global Search Bar, you will be directed to a page of search results:



MICHIGAN WORKS!

MWA Management... Home Leads Accounts Contacts Projects Job Orders Dashboards Reports Chatter List Emails

Q Costco

We searched for "Costco".

Search Results

Top Results

Accounts 5+ Results • Sorted by Relevance

Account Name	Phone	Account Owner Alias	Billing City	MI County	Created
Costco	734-213-8029	ctobe	Ann Arbor	Washtenaw	3/15/
Costco Southfield	323-972-6179	ddavi	Southfield	Oakland	1/11/
Costco Wholesale	(734) 427-0563	bsqui	Livonia	Wayne	10/10/
Costco Wholesale	(616) 406-2651	jkhov	Wyoming	Kent	2/13/
Costco	(248) 648-0020	dvan	Auburn Hills		7/19/

Files

1 Result

Title	Size	File Extension	Last Modified Date	Owner
CDS/OBS---payrate-field	17.7MB	pdf	9/16/2022 2:10 PM	Kian...

Tasks

2 Results • Sorted by Relevance

Subject	Name	Related To	Due Date
Call and Bus Svc email		Jackson Dean Construction	6/30/2023
Email	Jared Weeks	Wireless Advocates	7/29/2022

Don't see your result?
We searched the objects you use most, but we didn't search everything.
Know which object you're looking for? Select it in the dropdown next to the search box, or in the sidebar.

From this page, you can use the left hand navigation menu to find search results in any of the tabs of related information that include your search query. The main panel of the search results will return additional information for your search. Use any blue font to click into results.

USE THE GLOBAL SEARCH BAR–It is your friend!

There is also a matching rule within Salesforce that will flag if an Account appears to be a duplicate during the entering of the record. The matching rule for Accounts will look for similarities in these fields to flag duplicates:

Account Name AND Billing Street)

OR (Account Name AND City AND State)

OR (Account Name AND ZIP)

OR (Account Name AND Phone)

OR (Website AND Phone)

OR (Website AND Billing Street)

If a duplicate is detected, a message will pop up by the save button.



The screenshot shows the Michigan Works! interface. A search for 'Costco' has been performed, resulting in a list of accounts. A modal window for editing an account is open, showing fields for Billing Address and Shipping Address. A warning message 'Similar Records Exist' is displayed, stating: 'This record looks like an existing record. Make sure to check any potential duplicate records before saving. View Duplicates'. The warning is accompanied by a red 'X' icon. The modal also includes buttons for 'Cancel', 'Save & New', and 'Save'.

It is good practice to enter as much information about a record to avoid duplication.

Data Entry Process-Creating new records

There are two ways to create a new record (Account, Leads, Contacts, Projects, Job Orders)

- ☐ Navigate to the tab in the Navigation menu –click on the arrow button and click New Account or
- ☐ Click on the tab for the record you want to enter and then click New

The screenshot shows the Michigan Works! Accounts page. The 'Accounts' tab is selected in the navigation menu. The 'New' button is highlighted with a blue circle. The page displays a table of recently viewed accounts.

Account Name	Phone	Account Owner Alias	Billing City	MI County	Created Date
1 Costco	734-213-8029	ctobe	Ann Arbor	Washtenaw	3/15/2016 8:00 PM
2 Costco Wholesale	(734) 427-0563	bsqui	Livonia	Wayne	10/10/2018 12:33 PM



Required fields have a red asterisk beside the name. Click SAVE at the bottom of the window.

Some fields are multi-picklist and you choose all that apply and move over to the “chosen” side....

Remember that the Account is the Parent record. So as you enter new information remember to enter it from the “top down”. Enter the Account information first then enter contacts, and finally projects or job orders you are working on.



Navigating Accounts

Once you have an account created, any other record that is linked or related to the Account will be listed on the Account page.

It is best practice to start all data entry from the Account record. This ensures that data is related back to the correct account. The Account landing page is mission control for your Accounts.

The screenshot shows the Michigan Works! Accounts page for an account named "test acme organization". The page has a top navigation bar with a search box and various menu items. Below the navigation bar, there's a section for account information including billing address, phone, latest activity date, and account owner. A message states "We found no potential duplicates of this Account." Below this, there are related list quick links for Activity History (5), Contacts (2), Open Activities (3), Projects (2), Job Orders (2), Partners (1), Notes (0), Files (0), and Account History (0). The main content area is divided into two panels. The left panel shows account information with fields for account owner, name, site, parent account, BRN, and engagement level. The right panel shows the Activity History (5) and Contacts (2) lists. The Activity History list has columns for Subject, Name, Related To, Date of Activity, Due Date, Assigned To, and Last Modified Date/Time. The Contacts list has columns for Contact Name, Title, Email, Phone, Primary, Status, and Contact Owner.

Subject	Name	Related To	Date of Activity	Due Date	Assigned To	Last Modified Date/Time
Cold Call Visit	Jane Doe	test acme organization	6/29/2023	6/29/2023	Lori Johnson	6/29/2023 9:27 AM
Business Service...	Johnson	test acme organization	6/28/2023	6/28/2023	Lori Johnson	6/28/2023 11:13 PM
List Email: test	Johnson	test	3/11/2020	3/11/2020	Lori Johnson	3/11/2020 4:25 PM
Call- Johnson Ca...	Johnson	JO-18764	11/5/2018	11/5/2018	Lori Johnson	11/5/2018 10:28 AM
Business Service...	test acme organization		6/28/2023		Lori Johnson	6/29/2023 9:31 AM

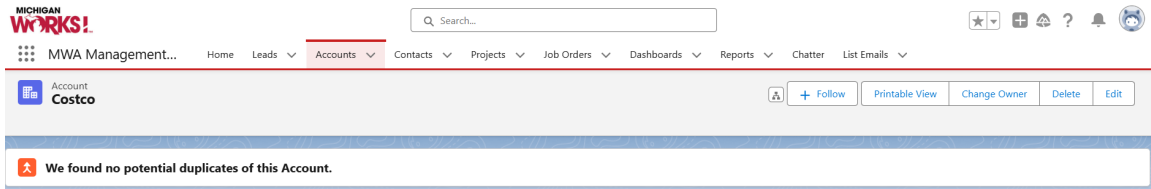
Contact Na...	Title	Email	Phone	Primary	Status	Contact Ow...
Jane Doe			(989) 412-8888	☒	Active	ljohn
Johnson		ljohnson@conrin.com		☐	Active	ljohn

This top panel will include some quick information about the Account and provide navigation buttons

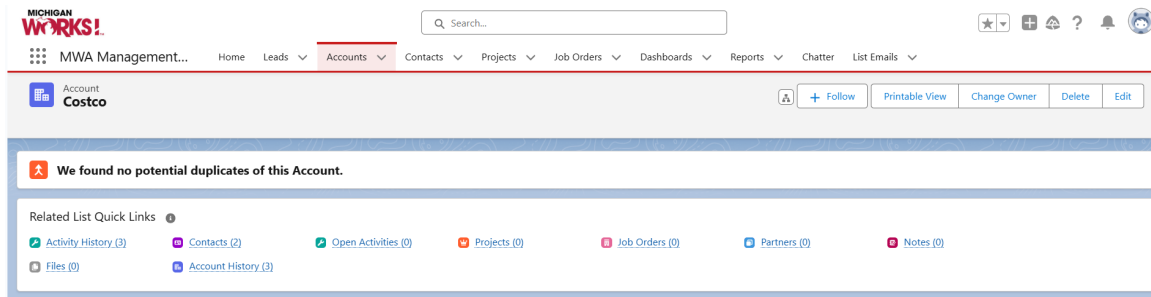
The screenshot shows the Michigan Works! Accounts page for an account named "Costco". The page has a top navigation bar with a search box and various menu items. Below the navigation bar, there's a section for account information including billing address, phone, latest activity date, and account owner. The account owner is Curtis Tober.

Billing Address	Phone	Latest Activity Date	Account Owner
771 Airport Boulevard Ann Arbor, MI 48108 United States	734-213-8029	10/30/2024	Curtis Tober

The next panel will show if there are potential duplicates.



Next are related quick links to other records that are directly related to this Account.



Hovering over each quick link will show a window where you can quickly access information. The account information is located in the panel down the left hand side of the screen. Here you can edit individual fields by clicking on the pencil.



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MICHIGAN

WORKS!

MWA Management...

Home

Leads

Accounts

Account

Costco

Account Information

Account Owner

Curtis Tober

Account Name

Costco

Site

Parent Account

BRN

Individual with Disability Owned

Minority Owned

Phone

734-213-8029

Fax

Website

www.costco.com

Status

Active

Type

Engagement Level

On the left side of the screen, the related lists are displayed in separate boxes where you can find additional information or add records.



MICHIGAN WORKS!

MWA Management... Home Leads Accounts Contacts Projects Job Orders Dashboards Reports Chatter List Emails

Account: **Costco** + Follow Printable View Change Owner Delete Edit

Account Information

Account Owner: [Curtis Tober](#) Phone: 734-213-8029

Account Name: Costco Fax:

Site: Website: www.costco.com

Parent Account: Status: Active

BRN: Type:

Individual with Disability Owned: Engagement Level:

Minority Owned:

Woman Owned:

Activity History (3)

3 items • Sorted by Due Date • Updated 6 minutes ago

	Subject	Name	Related To	Date of Acti...	Due Date	Assigned To	Last Modified ...
1	Email		Costco	10/30/2024	10/30/2024	Curtis Tober	10/30/2024 2:21 PM
2	Email		Costco	10/30/2024	10/30/2024	Curtis Tober	10/30/2024 2:20 PM
3	Visit		Costco	3/16/2016		Peggy Windsor	1/28/2025 8:33 AM

[View All](#)

Contacts (2)

2 items • Sorted by Primary • Updated 2 minutes ago

	Contact Name	Title	Email	Phone	Primary	Status
1	Angela Edens		w01106mk07@costco.com	734-213-8029	☒	Active
2	Jim Dolgas		w01106mk01@costco.com	(734) 213-8029	☐	Active

You can see in each related list item, you have the opportunity to create “New” items. This is the quickest way to enter new projects, contacts, job orders, and activities into SF.

WHAT ARE ACTIVITIES

The Activities tab is a place where you will log contact with an employer. You would not log a project or a job order here. Using the **LOG A CALL** button

Activity History (3)

3 items • Sorted by Due Date • Updated 10 minutes ago

[Log a Call](#) [Email](#)

	Subject	Name	Related To	Date of Acti...	Due Date	Assigned To	Last Modified ...
1	Email		Costco	10/30/2024	10/30/2024	Curtis Tober	10/30/2024 2:21 PM
2	Email		Costco	10/30/2024	10/30/2024	Curtis Tober	10/30/2024 2:20 PM
3	Visit		Costco	3/16/2016		Peggy Windsor	1/28/2025 8:33 AM

ports ▾ Chatter List Emails ▾



+ Follow

Printable View

Change Owner

Delete

Edit

 Log a Call

—
↗
✕

*** Assigned To**

 Vicki Enriquez
 ✕

*** Status**

Completed
▾

Subject

Call
🔍

Name

 ▾ Search Contacts...
 🔍

Due Date

2/6/2025
📅

Related To

 Costco
 ✕

Save

You can quickly log your recent contact with an employer by completing the fields. The system will automatically Assign this activity to you; however, you can assign the activity to a different user in your organization. When you assign an activity to another team member, they are notified via email and they also receive a task that will be present on their SF homepage.

The Subject field has drop down options or you can free type into the box. Be sure to check with your organization to determine the process and procedure for



all data entry. You can also relate this activity to a contact that is related to this Account. Click in Search Contacts, and search the contact by Name. Choose the Date of the Activity and add Comments. Click Save.

You can directly send an email to a contact using the Activity related list, and it will automatically get logged into the contact and the account.

The screenshot displays the FiveForce system interface. At the top, the account name "Costco" is visible. Below it, a "Related List Quick Links" section contains various icons and counts for Activity History (3), Contacts (2), Open Activities (0), Projects (0), Job Orders (0), Partners (0), and Notes (0). The main content area is divided into two panels. The left panel, titled "Account Information", shows details for "Curtis Tober" (Account Owner), "Costco" (Account Name), and "Site". The right panel, titled "Activity History (3)", shows a table of activities. A blue arrow points to the "Email" button in the top right corner of the Activity History panel. An "Email" modal window is open in the foreground, showing fields for "From" (Vicki Enriquez <venriquez@mwse.org>), "To" (Cc), "Bcc" (venriquez@mwse.org), and "Subject" (Enter Subject...). The modal also includes a rich text editor with formatting options (Font, Size, Bold, Italic, Underline, Text Color, Image, Bulleted List, Numbered List, Indent, Outdent) and a "Send" button at the bottom right. The "Related To" field at the bottom of the modal is set to "Costco".

	Subject	Name	Related To	Date of Act...	Due Date	Assigned To	Last Modified ...
1	Email		Costco	10/30/2024	10/30/2024	Curtis Tober	10/30/2024 2:21 PM
2	Email		Costco	10/30/2024	10/30/2024	Curtis Tober	10/30/2024 2:20 PM

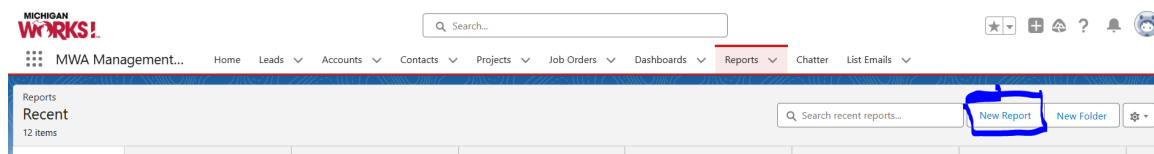


A word of caution: emailing from Salesforce will not save the email in your mail inbox.

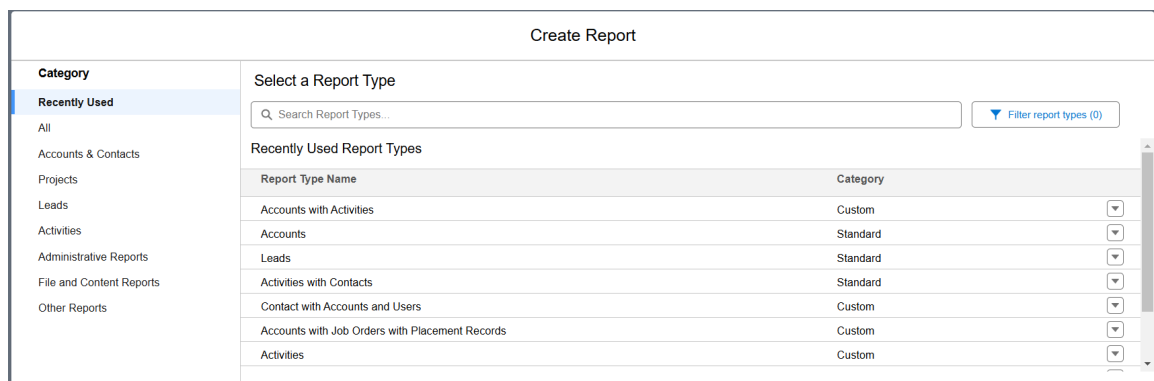
Report Writing

SF has extensive report writing capabilities that are easy to use due to the “drag and drop” feature. The following will provide the basics on report creation. Once you get to learn the system you will be able to apply it to any report writing requirements.

Click onto the Report tab then click onto the “New Report” button.



Next, choose a report type. For instance, if you want to create a report of all the accounts you have created this year, choose the Accounts and Contacts then click the Create button on the lower right side of the page. This will bring you to the “Accounts and Contacts” template from which you will start creating your report.



You will now be able to create the report. This is where you will identify the fields and logic needed to create your report. All the fields available for your report on on the left-hand side of the screen. To add a field, you can double click on the



field or you can drag it the right and in place on the report. To take off a field, click and drag to the left.

The screenshot shows the FiveForce Reports interface. At the top, there's a navigation bar with a search bar and various icons. Below it, a breadcrumb trail shows the path: Home > Leads > Accounts > Reports > Chatter > List Emails. The main heading is "New Accounts Report" with a sub-heading "Accounts". On the left, there's a sidebar with "Groups" and "Columns" sections. The "Columns" section lists fields: Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date. The main area shows a preview of the report with a message: "No records returned in preview. Try running the report or editing report filters." Below this message are links: "Show All accounts", "Set the Created Date filter to All Time", and "Edit other filters in the filter panel." At the top right of the main area, there are buttons: "Add Chart", "Save & Run", "Save", "Close", and "Run".

Notice the Filter section at the top of the report creator. This is where you will choose how to filter your report by date or other filter options. You may also add a filter for any field you have included in your report by easily clicking the field name in the report and dragging to the top.

While choosing fields and filters, you will see a sample running of your report. This will not include all possible records. You must choose RUN at the top to run for all records. This new report will be detailed in a new screen. From this screen you can choose many options like Save, Export, Customize, or Schedule Reports.

After you have created a report, you may be able to turn it into a DASHBOARD which is a quick pictorial view of the report details. Reports that are turned into dashboards must be either a summary report or a matrix report. Tabular reports can be dashboards but are not available with gauge or metric dashboard components. Don't let this fancy language scare you...creating reports and dashboards are very easy and fun!



Mass Email Instructions

Using a “List View” you can create a List Email which will mass email contacts.

The first step will be to create a new list of contacts or use an existing list already in Salesforce.

To Create a List View:

Navigate to the Contacts Tab. The red arrow below shows the “recently viewed” list. If you use the drop down arrow, you will find other list views. *Fun Fact: You can use the push pin next to the drop down arrow to PIN a favorite list view that you find handy.*

A screenshot of the Salesforce interface showing the "Contacts" tab. At the top, a blue banner reads "Einstein Activity Capture is enabled. To start...". Below this is the "MICHIGAN WORKS! Great Lakes Bay Region" logo. The navigation bar includes "Business Services ...", "Home", "Employers", "Contacts" (selected), "Services", and "Going Pro Tal...". The "Contacts" section shows a list view titled "Recently Viewed" with a dropdown arrow and a pushpin icon. A red arrow points to the dropdown arrow. Below the title, it says "1 item • Updated a few seconds ago". The table below has columns: NAME, EMPLOYER NAME, and PHONE. The first row shows "Benjamin Spreeman" from "Adecco" with phone number "(989) 797-4411".

	NAME	EMPLOYER NAME	PHONE
1	Benjamin Spreeman	Adecco	(989) 797-4411

If you want to create a new list of contacts to send you mass email to, for example all Midland county employers, click on the gear and select NEW.

A screenshot of the Salesforce interface showing the "Contacts" tab. The navigation bar is the same as the previous screenshot. The "Contacts" section shows a list view titled "All Contacts" with a dropdown arrow and a pushpin icon. In the top right corner of the list view, there are buttons for "New", "Import", and "Send List Email". The "New" button is circled in red. Below the title, it says "50+ items • Sorted by Active • Filtered by all contacts • Updated a minute ago". The table below has columns: NAME, EMPLOYER NAME, TITLE, PHONE, and EMAIL. The first row shows "Test XX-Smith" from "FiveForce Consulting" with title "Administrative Assistant". The second row shows "Isma VV.Nicole" from "Great Lakes Chamber of Commerce" with title "Mid Inner employee".

	NAME	EMPLOYER NAME	TITLE	PHONE	EMAIL
1	Test XX-Smith	FiveForce Consulting	Administrative Assistant		
2	Isma VV.Nicole	Great Lakes Chamber of Commerce	Mid Inner employee	080.463.6536	



Give your list a name and choose who can view this list. Click Save.

New List View

*** List Name**

Midland County Employers

*** List API Name** ⓘ

Midland_County_Employers

Who sees this list view?

☐ Only I can see this list view

☒ All users can see this list view ⓘ

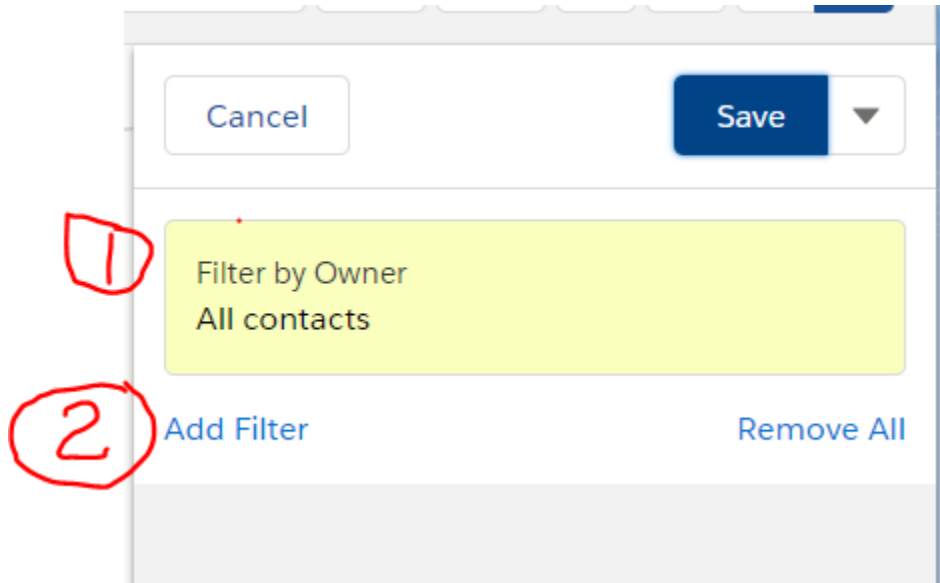
☐ Share list view with groups of users ⓘ

[Cancel](#) [Save](#)

Admin / HP (989) 44

Use the filters to create your specific list. 1. You may want to change the default filter from “My Contacts” to “All Contacts”. In this example, we will also filter for only Midland county employers.

2. Click Add Filter.



A screenshot of a software interface showing a filter dialog box. At the top, there are 'Cancel' and 'Save' buttons. Below them is a yellow box containing the text 'Filter by Owner' and 'All contacts'. A red circle with the number '1' is drawn around the yellow box. Below the yellow box, there are two buttons: 'Add Filter' and 'Remove All'. A red circle with the number '2' is drawn around the 'Add Filter' button.

Use the drop down arrows to find the “Field” you would like to filter...in this example, “County”.

Second, use the drop down arrow to pick the value of the field. You have a drop down here because this field is a picklist. If we had chosen to do Midland city employers, we would have chosen the City field and then in the Value box, typed in Midland.

Click Done.

Then Click Save.



Search this list...

TITLE ↑ CONTACT OWNER ...

Field: County

Operator: equals

Value: 1 option selected

Done

Cancel Save

Filter by Owner: All contacts

Matching all of these filters

New Filter*

Add Filter Remove All

Add Filter Logic

Your new list view will populate. Use the checkboxes next to the Name to choose which contacts you want to send the Mass Email.

Once you have selected all the contacts you would like to send the mass email to, click on the **SEND LIST EMAIL** button at the top right of the list. Note: There is a daily limit of 5,000 emails per day.

WORKS! Great Lakes Bay Region

Business Services ... Home Employers > Contacts > Services > Going Pro Talent Fund > Reports > Dashboards > Chatter

Contacts

Midland County Employers

50+ Items - Sorted by Name - Filtered by all contacts - County - Updated a few seconds ago

Search this list...

	NAME ↑	EMPLOYER NAME	PHONE	EMAIL	TITLE	CONTACT OW...
1	☐ Aaron Schafer	Captain Dave's Roll Arena				wdoyl
2	☐ Adam Anderson	Carquest	(989) 832-0800		Manager	wdoyl
3	☐ Adam Nowak	Modis Engineering	(989) 486-6026	adam.nowak@modis.com		kaczmarj
4	☐ Adeel Khan	Renal Associates of Mid Michigan PC		akhanmd@yahoo.com		wdoyl
5	☐ Adrian Merrington	Michigan Molecular Institute...	(989) 832-5555	merrington@mml.org	Senior Associate Scientist	wdoyl
6	☐ Al Chatterton	Lloyd's Door Systems...				kklei
7	☐ Alan Lepley	Buffalo Wild Wings - Midland			GM	kklei
8	☐ Alan Saterlee	Central Michigan Home Improvements	(800) 434-7024	cmhi1@aol.com	Owner	wdoyl
9	☐ Alfred Dixon	Andrews Hooper Pavlik PLC...	(989) 835-7721	alfred.dixon@ahppic.com	Manager	jruess
10	☐ Alicia Timmons	Whine (PMTIC Waterfall Grill)				kklei
11	☐ Alison Falls	Tropical Smoothie Cafe - S. Saginaw, Midland			Manager	jbail
12	☐ Alison G.	North Midland Family Center		aginter@nmfc.org		wdoyl
13	☐ Allison X	Creative 360			Receptionist	aames
14	☐ Amanda Booth	Absolute Therapeutic Massage and Bodywork				jbail

A new box will pop up to write your email. Notice that the contacts you choose from the list are already listed in the Following the email template to enter a subject and the content of your



email. See that the contacts you choose in the prior step are already in the Recipients box.

A screenshot of the "Send List Email" interface in Salesforce. The title "Send List Email" is at the top. Below it, the "Recipients" section shows a list of 50 recipients, with the first one highlighted. The "Enter Subject..." field is highlighted in yellow. The "Content" tab is selected, showing a rich text editor with various formatting options (Font, Size, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, Video, File, etc.). The editor area is mostly empty, with a yellow squiggly line indicating where text can be entered. At the bottom, there are three small icons: a merge field icon, a template icon, and an attach file icon. A status bar at the bottom right shows "5000/5000 send limits remaining" and a "Send" button.

At the bottom of the email box, there are three small icons. You can insert merge fields to personalize the email, for example Contact First Name. You can also create an email template to use for future and ongoing use, and you can attach files.

Mass Emails attach directly to the contact as an activity with the Subject as the identifier.

To find a listing of your sent or draft List Emails, use the LIST EMAILS tab in the navigation bar of Salesforce. You can also use the List Emails navigation tab to create a new list email-however, you must have the list view created first in the Contacts or Lead Tab.

A screenshot of the Salesforce navigation bar and the List Emails table. The navigation bar includes the "MICHIGAN WORKS!" logo, a search bar, and a list of tabs: Home, Leads, Accounts, Contacts, Projects, Job Orders, Dashboards, Reports, Chatter, and List Emails. The "List Emails" tab is highlighted with a red circle. Below the navigation bar, the "List Emails" section is shown, with a "Recently Viewed" dropdown and a "Send List Email" button (also highlighted with a red circle). The table below shows a single item with the following data:

	Name	Owner Alias	Scheduled Date	Status
1	test	ljohn	3/11/2020 4:25 PM	Sent



Integrating Outlook & Gmail with Salesforce

Salesforce allows you to connect your **email inbox** (Outlook or Gmail) to log emails, sync contacts, and manage calendar events directly from your email. Users should verify with their Agency Salesforce Admin and/or IT Department before integrating. Follow the steps below to complete the setup.

For Outlook Users (Microsoft 365)

Step 1: Install the Salesforce Add-in for Outlook

1. Open **Outlook** and go to the **Home** tab.
2. Click on **Get Add-ins** (or **Apps** in some versions).
3. Search for "**Salesforce**" and select "**Salesforce for Outlook**".
4. Click **Add** to install the extension.

Step 2: Log in to Salesforce

1. Open any email in Outlook.
2. Click the **Salesforce icon** in the toolbar (right panel may open automatically).
3. Click **Log In**, then enter your **Salesforce credentials**.
4. Allow permissions if prompted.

Step 3: Start Logging Emails & Syncing

- Open any email and click the **Salesforce icon** in Outlook.
 - Click **Log Email** to associate it with a Contact, Lead, or Opportunity in Salesforce.
 - Click **Add to Salesforce** to create a new record.
 - Use the **Calendar Sync** to add meetings to Salesforce.
-

For Gmail Users (Google Workspace)

Step 1: Install the Salesforce Chrome Extension

1. Open **Google Chrome** and go to the **Chrome Web Store**.
2. Search for "**Salesforce Gmail Integration**".



3. Click **Add to Chrome** → **Add Extension**.

Step 2: Log in to Salesforce

1. Open Gmail and click on any email.
2. In the right panel, find the **Salesforce icon**.
3. Click **Log In**, then enter your **Salesforce credentials**.
4. Allow permissions if prompted.

Step 3: Start Logging Emails & Syncing

- Open an email and click **Log to Salesforce** to attach it to a Contact, Lead, or Opportunity.
 - Click **Add to Salesforce** to create a new record.
 - Use the **Calendar Sync** feature to track events in Salesforce.
-

FAQs

What if I don't see the Salesforce panel in Outlook or Gmail?

- Click on the **Salesforce icon** in the toolbar or extensions area.
- Restart your browser (for Gmail) or Outlook.

Can I sync my calendar automatically?

- Yes, once logged in, enable **Calendar Sync** in the Salesforce side panel.

Who do I contact for help?

- Reach out to **your Agency Salesforce Admin** for troubleshooting. They will route the question to the MWA Salesforce Admin for assistance.