

Employer Solutions Team Salesforce Tutorial 2021

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1) NEWS FEED

The screenshot shows the Salesforce News Feed interface. At the top, there's a search bar and navigation links for Home, Accounts, Contacts, Reports, Dashboards, Chatter, and Files. The user profile at the top is Eliza Chappell, dated Monday March 15, 2021. Below the profile, there's a 'Hide Feed' button and a 'Share' button. The main feed area shows a post by F.O. Day — Mark Chernisky, dated May 18, 2020 at 10:09 PM. The post content is: 'F.O. Day has Unskilled, Skilled Laborer, Roller Operator, Paver Operator, Milling Machine Operators and many other openings in VA and MD'. Below the post, there's a 'You like this.' section showing a post by Mark Chernisky, dated May 18, 2020 at 10:25 PM. The post content is: 'Pipe Laborer, Loader Operator, Asphalt Equipment Mechanic, Asphalt Field Quality Control Technician, Excavator Operator (mainline and backfill), Dump Truck Driver, Bulldozer Operator, Senior Heavy Highway & Paving Estimator, Pipelayer, Paving Tack Truck Driver'. To the right of the feed, there's a 'Recommendations' section with a 'More' link. The recommendations list includes Angela Harris (Popular user: 7 followers), Laura Snell (Follows the same people), Seema Jain (Popular user: 6 followers), and Maria Martin (Popular user: 5 followers). Two blue arrows point to the 'Share' button and the 'Recommendations' section. A text box on the right says 'Add links or announcements to the news feed to share with the team'. Another text box on the right says 'Follow other Salesforce license holders on our team to see their posts'.

Eliza Chappell
Monday March 15, 2021

Discover Spring '21

Post File Link Poll

Share an update, @mention someone...

Share

Sort By Most Recent Activity

F.O. Day — Mark Chernisky

F.O. Day has Unskilled, Skilled Laborer, Roller Operator, Paver Operator, Milling Machine Operators and many other openings in VA and MD

Topics: Pipe Laborer, Loader Operator, Roller Operator, (1 more)

Comment - Unlike - May 18, 2020 at 10:09 PM

You like this.

Mark Chernisky

Pipe Laborer, Loader Operator, Asphalt Equipment Mechanic, Asphalt Field Quality Control Technician, Excavator Operator (mainline and backfill), Dump Truck Driver, Bulldozer Operator, Senior Heavy Highway & Paving Estimator, Pipelayer, Paving Tack Truck Driver

Like - May 18, 2020 at 10:25 PM

Recommendations More

Download Salesforce
Run your business from your phone with Salesforce.
Skip >

Angela Harris
Popular user: 7 followers
Follow

Laura Snell
Follows the same people
Follow

Seema Jain
Popular user: 6 followers
Follow

Maria Martin
Popular user: 5 followers
Follow

Add links or announcements to the news feed to share with the team

Follow other Salesforce license holders on our team to see their posts

2) ADDING YOUR ACTIVITIES

Step 1: Check if the Account (Company) exists already (if not, see section 3 below)

The screenshot shows the Salesforce search results for 'PeopleReady'. A blue arrow points to the search bar containing 'PeopleReady'. A text box above the arrow says: 'Search for Company Name. If Company is NOT there, add the Account (see Section 3)'. Below the search bar, there are two sections: 'Accounts (2)' and 'Activities (3)'. The 'Accounts (2)' section contains a table with two rows of account information. A blue arrow points to the first row of the 'Accounts' table. A text box next to the arrow says: 'Select most relevant, or most often used, version'. The 'Activities (3)' section contains a table with one row of activity information.

Action	Account Name	Phone	Billing Street	Billing City	Billing State/Province	Billing Zip
Edit	People Ready	(703) 530-6350	9383 Forestwood Lane	Manassas	VA	22601
Edit	PeopleReady	540.54.8920	682 N. Loudoun St.	Winchester	VA	22601

Action	Subject	Name	Related To	Due Date	Assigned Alias
Edit	Service		OAR Fairfax		mluna

Step 2: Check if your Contact is already in there

The screenshot shows the Salesforce account detail for 'People Ready'. A blue arrow points to the 'Contacts (8)' link in the top navigation bar. A text box next to the arrow says: 'Click contacts to see all representatives the team has interacted with'. Below the navigation bar, the 'Account Detail' section shows the account name 'People Ready' and its phone and fax numbers.

Account Name	Phone	Fax
People Ready [View Hierarchy]	(703) 530-6350	(703) 392-7321

Account: People Ready ~ Salesforce

na93.salesforce.com/001F000001nT5Gn?srPos=0&srKp=001#001F000001nT5Gn_RelatedContactList_target

Apps WordPress SSA Portal NENA 2020 10th A... 12-30 Restart Blackboard iSolved HCM Shyneka Palmer 2n... Basic Computer Skill... IT Employers Alison | Free Online... Other bookmarks

Contacts

New Contact

Action	Contact Name	Title	Email	Phone
Edit	Marisol Brandon		mbrandon@peopleready.com	(703) 830-6350
Edit	Danielle Gache-Piriz	Market Recruiter	dgache-piriz@peopleready.com	(703) 530-6350
Edit	Kathy Gray	On-site Manger	kgray@peopleready.com	(703) 382-6353
Edit	David Hatch	Branch Manager	1257_hr@peopleready.com	(703) 530-6350
Edit	Kaneia James	Market Recruiting Coordination	kjaime@peopleready.com	(703) 530-6350
Edit	Kevin Lewicki	Branch Manager	klewicki@peopleready.com	(703) 530-6350
Edit	Wendy St. Laurent	Staffing Specialist	rwtherspoon@laborready.com	(703) 530-6350
Edit	Rasheeda Witherspoon		rwtherspoon@laborready.com	(703) 830-6350

See if your contact is already here. If not, add contact (see section 3).

Open Activities

New Task New Event

No records to display

Activity History

Send an Email

Action	Subject	Name	Related To	Create Date
Edit	Del Service	Danielle Gache-Piriz	People Ready	4/10/2020
Edit	Del Service	Danielle Gache-Piriz	People Ready	2/8/2020
Edit	Del Service	Danielle Gache-Piriz	People Ready	2/8/2020
Edit	Del Service	Danielle Gache-Piriz	People Ready	2/8/2020
Edit	Del Service	Danielle Gache-Piriz	People Ready	2/8/2020

You can also see who on the team most recently interacted with the organization and what they did

Service	Single Point of Contact
Organizing/Hosting a Job Fair	Angela Harris
Organizing/Hosting a Job Fair	Angela Harris
Organizing/Hosting a Job Fair	Angela Harris
Organizing/Hosting a Job Fair	Angela Harris
Organizing/Hosting a Job Fair	Angela Harris

Step 3: Add Your Activities

Account: People Ready ~ Salesforce

na93.salesforce.com/001F000001nT5Gn?srPos=0&srKp=001#001F000001nT5Gn_RelatedContactList_target

Apps WordPress SSA Portal NENA 2020 10th A... 12-30 Restart Blackboard iSolved HCM Shyneka Palmer 2n... Basic Computer Skill... IT Employers Alison | Free Online... Other bookmarks

Contacts

New Contact

Action	Contact Name	Title	Email	Phone
Edit	Marisol Brandon		mbrandon@peopleready.com	(703) 830-6350
Edit	Danielle Gache-Piriz	Market Recruiter	dgache-piriz@peopleready.com	(703) 530-6350
Edit	Kathy Gray	On-site Manger	kgray@peopleready.com	(703) 382-6353
Edit	David Hatch	Branch Manager	1257_hr@peopleready.com	(703) 530-6350
Edit	Kaneia James	Market Recruiting Coordination	kjaime@peopleready.com	(703) 530-6350
Edit	Kevin Lewicki	Branch Manager	klewicki@peopleready.com	(703) 530-6350
Edit	Wendy St. Laurent	Staffing Specialist	rwtherspoon@laborready.com	(703) 530-6350
Edit	Rasheeda Witherspoon		rwtherspoon@laborready.com	(703) 830-6350

Open Activities

New Task New Event

No records to display

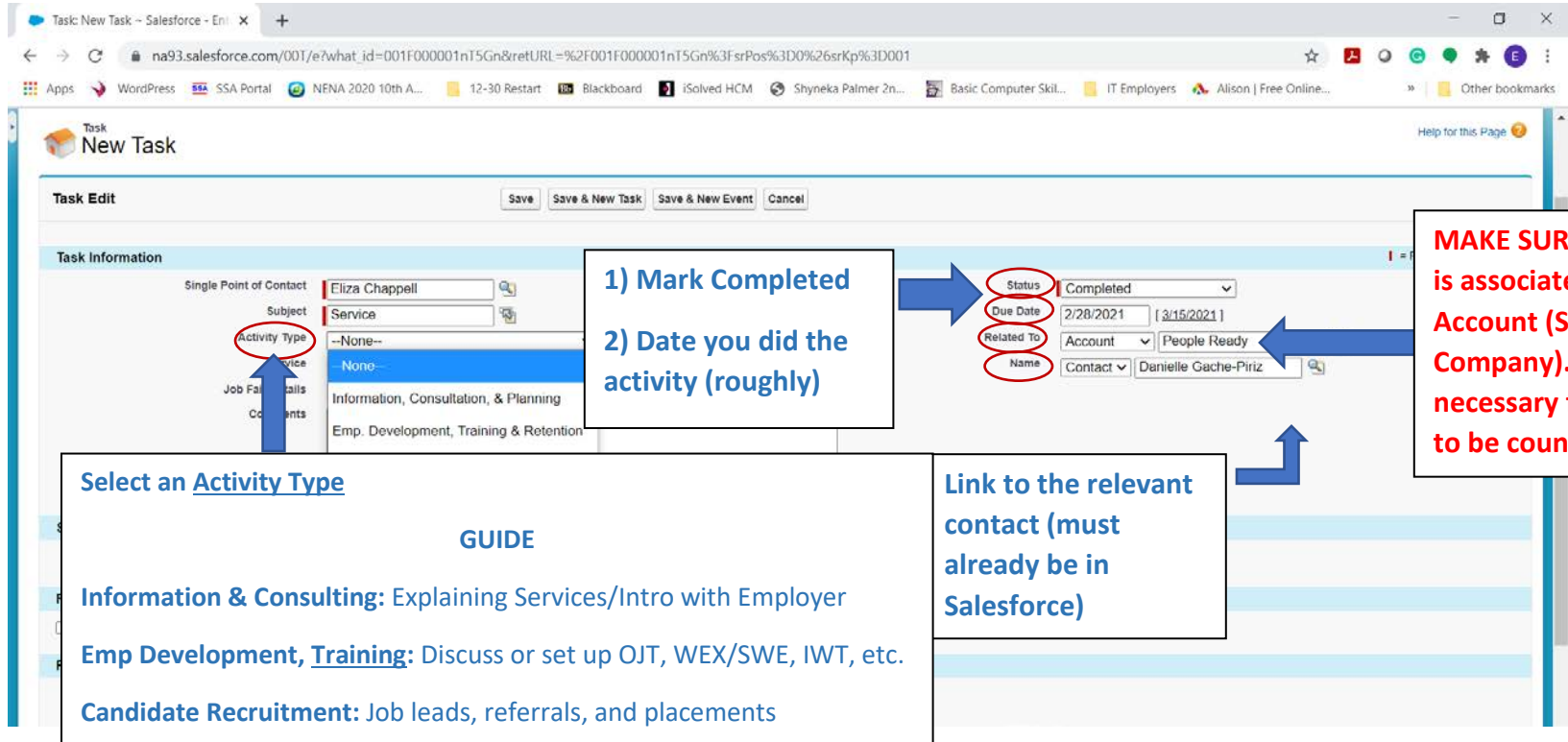
Activity History

Send an Email View All Log an Activity

Action	Subject	Name	Related To	Create Date	Due Date	Activity Type
Edit	Del Service	Danielle Gache-Piriz	People Ready	4/10/2020	3/5/2020	Candidate Recruiting & Screening
Edit	Del Service	Danielle Gache-Piriz	People Ready	2/8/2020	2/27/2020	Candidate Recruiting & Screening
Edit	Del Service	Danielle Gache-Piriz	People Ready	2/8/2020	2/8/2020	Candidate Recruiting & Screening
Edit	Del Service	Danielle Gache-Piriz	People Ready	2/8/2020	1/16/2020	Candidate Recruiting & Screening
Edit	Del Service	Danielle Gache-Piriz	People Ready	2/8/2020	1/2/2020	Candidate Recruiting & Screening

If the activity has been completed, select "Log an Activity" (If the activity is still open and you wish you have reminders, you can select "New Task" or "New Event" in the section above this – Open Tasks)

Enter Interactions as seen below:



The screenshot shows the 'New Task' form in Salesforce. The form is titled 'Task Edit' and includes buttons for 'Save', 'Save & New Task', 'Save & New Event', and 'Cancel'. The 'Task Information' section contains fields for 'Single Point of Contact' (Eliza Chappell), 'Subject' (Service), 'Activity Type' (Information, Consultation, & Planning), 'Job Fair Details', and 'Comments'. The 'Status' is set to 'Completed', 'Due Date' is 2/28/2021, and 'Related To' is 'Account' (People Ready). The 'Name' field is 'Contact' (Danielle Gache-Piriz).

1) Mark Completed
2) Date you did the activity (roughly)

MAKE SURE this task is associated with an Account (Select the Company). This is necessary for the data to be counted.

Select an Activity Type

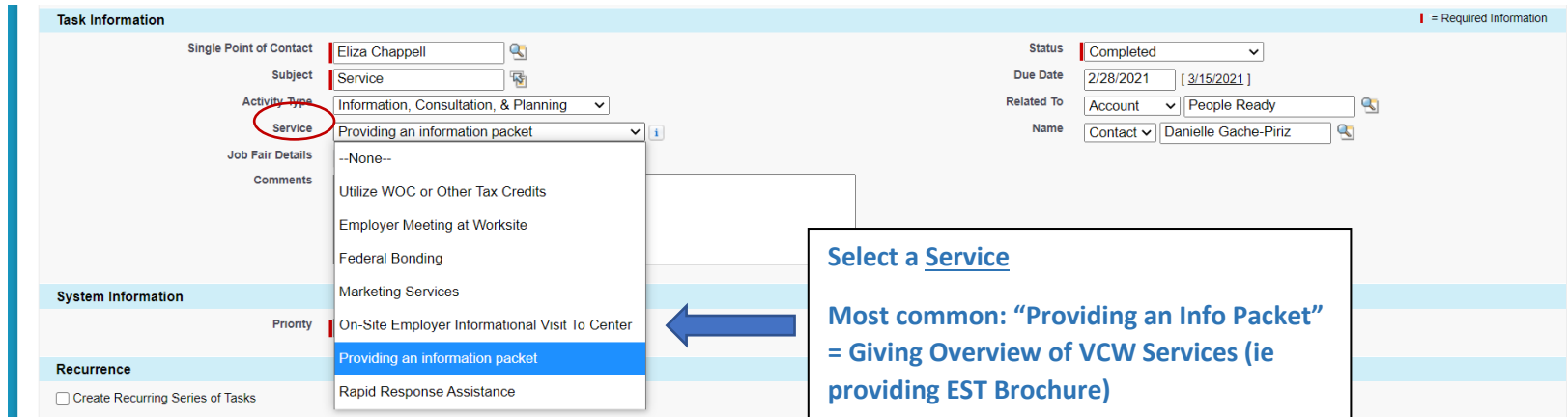
GUIDE

- Information & Consulting:** Explaining Services/Intro with Employer
- Emp Development, Training:** Discuss or set up OJT, WEX/SWE, IWT, etc.
- Candidate Recruitment:** Job leads, referrals, and placements

Link to the relevant contact (must already be in Salesforce)

Enter Services you did for that employer in each category (maximum one of each service per quarter, per user):

INFORMATION, CONSULTATION, AND PLANNING CATEGORY:



The screenshot shows the 'New Task' form with the 'Service' dropdown menu open. The dropdown lists several options: 'Providing an information packet', 'Utilize WOC or Other Tax Credits', 'Employer Meeting at Worksite', 'Federal Bonding', 'Marketing Services', 'On-Site Employer Informational Visit To Center', 'Providing an information packet', and 'Rapid Response Assistance'. The 'Status' is 'Completed', 'Due Date' is 2/28/2021, and 'Related To' is 'Account' (People Ready). The 'Name' field is 'Contact' (Danielle Gache-Piriz).

Select a Service

Most common: "Providing an Info Packet" = Giving Overview of VCW Services (ie providing EST Brochure)

DEVELOPMENT AND TRAINING CATEGORY:

Single Point of Contact: Eliza Chappell

Subject: Service

Activity Type: Emp. Development, Training & Retention

Service: --None--

Job Fair Details: --None--

Comments: Assisting with Incumbent Worker Training participation forms
Disability Training
Executing Customized Training Account
Discuss or Execute OJT Contract

System Information: Priority: Negotiating Customized Training Account

Status: Completed

Due Date: 2/28/2021 [3/15/2021]

Related To: Account People Ready

Name: Contact Danielle Gache-Piriz

Most Common: Explanation or setup of OJT or WEX/SWE options

RECRUITMENT AND DEVELOPMENT CATEGORY:

Task Information

Single Point of Contact: Eliza Chappell

Subject: Service

Activity Type: Candidate Recruiting & Screening

Service: --None--

Job Fair Details: --None--

Comments: **Entering a Job Order**
Organizing/Hosting a Job Fair
Referring job seekers to job order

System Information: Priority: Youth Employment Services

Recurrence: ☐ Create Recurring Series of Tasks

Reminder: **Job Placement**

Status: Completed

Due Date: 2/28/2021 [3/15/2021]

Related To: Account People Ready

Name: Contact Danielle Gache-Piriz

Most Common – You will likely have more than one!

Entering a Job Order = Sharing a lead with team members/clients

Referring job seekers to job order = Sending a candidate resume

Organizing/Hosting a job fair = You were POC for this employer for an event

ENTER EACH INDIVIDUALLY AND CLICK “SAVE” AFTER EACH:

Task Information

Single Point of Contact: Eliza Chappell
 Subject: Service
 Activity Type: Emp. Development, Training & Retention
 Service: Discuss or Execute OJT Contract
 Job Fair Details: --None--
 Comments: Employer is open to Work Experiences for Office Assistant position, looking for candidate with Excel skills

Status: Completed
 Due Date: 2/28/2021 [3/15/2021]
 Related To: Account People Ready
 Name: Contact Danielle Gache-Piriz

System Information

Priority: Normal

Recurrence

☐ Create Recurring Series of Tasks

Reminder

Reminder: ☐ 2/28/2021 8:00 AM

Buttons: Save Save & New Task Save

Click Save to go back to Account
 OR Click Save and New Task to add more than one

Note: For any contact you introduce to VCW, you should likely have all 3 for the first entry.
 Then you can add any additional activities as they occur. Example:

Activity History Send an Email View All Log an Activity Activity History Help ?

Action	Subject	Name	Related To	Create Date	Due Date	Activity Type	Service	Single Point of Contact
Edit Del	Service		Ttec	3/5/2021	2/3/2021	Candidate Recruiting & Screening	Job Placement	Warren Smith
Edit Del	Service		Ttec	3/5/2021	2/3/2021	Candidate Recruiting & Screening	Entering a Job Order	Warren Smith
Edit Del	Service		Ttec	3/5/2021	2/3/2021	Emp. Development, Training & Retention	Discuss or Execute OJT Contract	Warren Smith
Edit Del	Service		Ttec	3/5/2021	2/3/2021	Information, Consultation, & Planning	Providing an information packet	Warren Smith

TIPS:

- **Entries are due on the week after the last day of each quarter**
- **Come up with a strategy to keep track of your employer interactions** such as keeping a separate note or email folder to remind you of what you did. Then, set aside a day per week or month to enter the data.
- **Motivation** - Warren, Angela and Seema all rely on our data for reports. The information is reflected in the reports to the Board on employer service as well as our accountability to the state. It's also helpful to each other so we can see up to date what employers are active so we can all refer our candidates!

2) ADDING ACCOUNTS AND CONTACTS

If you search for an account and the company is not already in Salesforce, or the branch you are searching for is not in Salesforce, add an *Account*. If the company is there but your point of contact is not, add a *Contact*.

Adding an Account

Home Accounts Contacts Reports Dashboards Chatter Files +

Accounts Home

View: Transportation Go! Edit | Create New View

Recent Accounts **New** On the Accounts Tab, Select "New" Recently V

Home Accounts Contacts Reports Dashboards Chatter Files +

Account Edit New Account Help for this Page ?

Account Edit Save Save & New Cancel

Account Information

Account Name Phone Fax Billing Street Billing City Billing State/Province Billing Zip/Postal Code Billing Country

Parent Account Website Shipping Street Shipping City Shipping State/Province Shipping Zip/Postal Code Shipping Country

Additional Information

Type Employer Industry --None-- NAICS Code --None--

Additional Hiring Considerations Available Disability Friendly Second Chance Employer Section 503

Description Assigned To Name Available

Add contact info for the company or Branch location

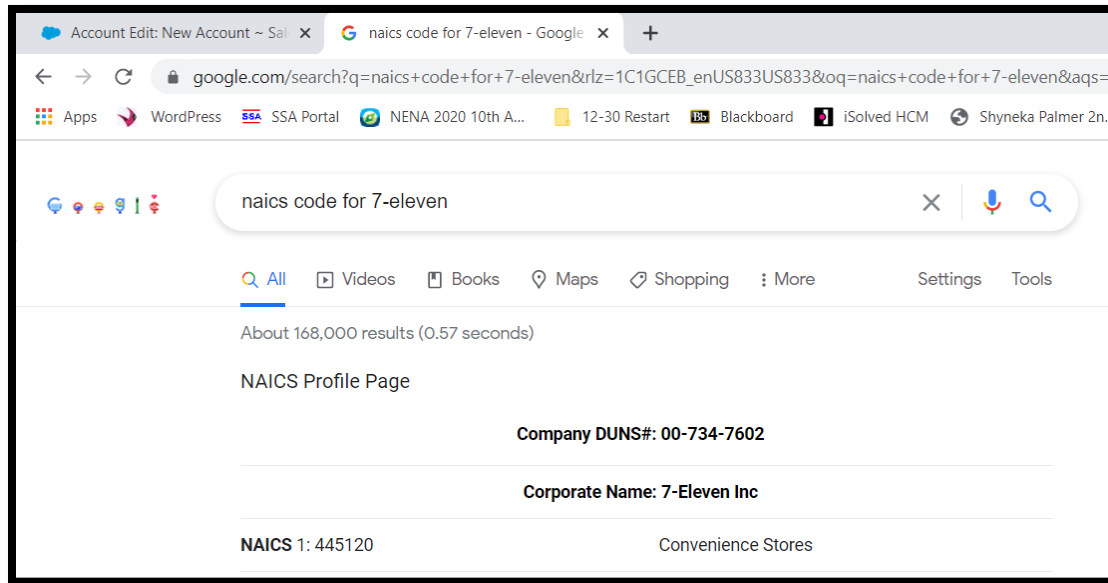
To find a NAICS Code, Google the company or industry and NAICS Code (see example below)

If the company already is in Salesforce, but you are adding a specific branch, select the other entry as the "Parent Account" to link them in Salesforce.

Enter the size of the local company site

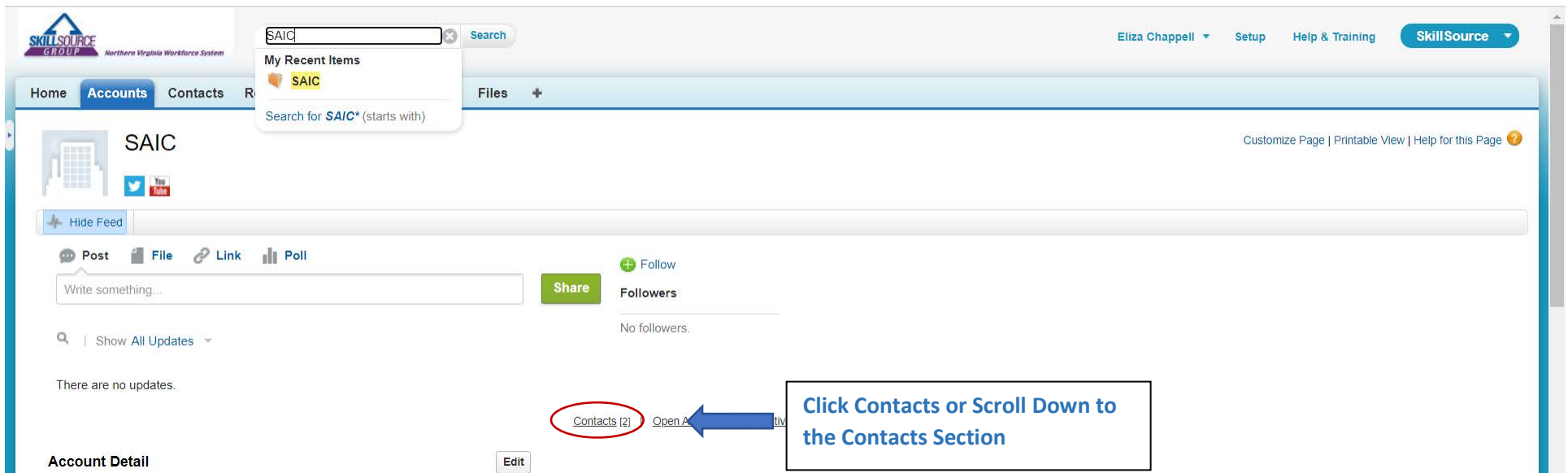
Add this if the company specifically mentioned being open to a certain population or seeking diversity hiring. 503 is if a federal contractor reached out to increase their diversity hire requirements

NAICS Code Google Example (this is more accurate than the NAICS website, which has given people some trouble):



Adding a Contact

Type in the company that the person works for, and pull up the Account



Scroll down to the contacts section – Here you can see what contacts are currently included, and what activities have been done.

Custom Links: [Google Search](#) [Google Maps](#)

[Edit](#) [New Contact](#) **Select New Contact** [Contacts Help ?](#)

Action	Contact Name	Title	Email	Phone
Edit	Amy Butchko	Strategic Talent Acquisition Programs Lead	amy.b.butchko@saic.com	(703) 828-7651
Edit	Britt Freedman	Programs Lead / Talent Acquisition	britt.freedman@saic.com	(703) 676-2055

Open Activities [New Task](#) [New Event](#) [Open Activities Help ?](#)

Action	Subject	Name	Related To	Task	Create Date	Due Date	Status	Priority	Single Point of Contact
Edit	Service		SAIC	✓	10/31/2019		In Progress	Normal	Miladros Luna Victoria

Enter Contact Information – Example:

[Contact Edit](#) **New Contact** [Help for this Page ?](#)

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

Contact Edit [Save](#) [Save & New](#) [Cancel](#)

Contact Information ! = Required Information

Salutation	--None--	Phone	(703) 864-0928
First Name	Marquita	Mobile	(571) 262-1879
Last Name	Delaney	Email	marquita.delaney@saic.co
Account Name	SAIC	Reports To	
Title	IT Recruiter		
Department	Information Technology		

Address Information [Copy Mailing Address to Other Address](#)

Mailing Street	11111 Sunset Hills Road	Other Street	
Mailing City	Reston	Other City	
Mailing State/Province	VA	Other State/Province	
Mailing Zip/Postal Code	20190	Other Zip/Postal Code	
Mailing Country		Other Country	

Additional Information

Fax		Assistant	
Home Phone		Asst. Phone	
Other Phone		Birthdate	
		Lead Source	--None--

(Optional)

Description Information

Activate Windows
Go to Settings to activate Windows.

Enter any description, context, or focus of the contact

Additional Information

Fax

Home Phone

Other Phone

Assistant

Asst. Phone

Birthdate

Lead Source

Description Information

Description

Assigned To Name

Available

Daryl Rosenbaum

James Do

Mouly Aloumouati

Chosen

(Ignore – contact will automatically be saved under your name)

System Information

Contact Owner Eliza Chappell

Mark for Delete ☐

Reason for Deletion

Save Save & New Cancel

Save to close, or Save & New to enter another contact under the same Account

Activate Windows

Happy Job Developing, Everyone!