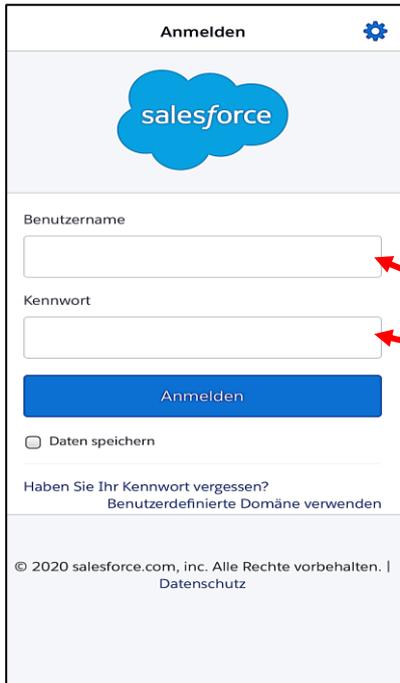


RENOLIT Salesforce Chatter Mobile App User Guide

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1. Login to Salesforce Chatter on your smartphone



The following steps must be completed every time you log in to the Salesforce App - including initial login, login after logout and when your app is updated.

Open the **Salesforce App**.

Enter your **username** and **password**.

Click on **Login**.

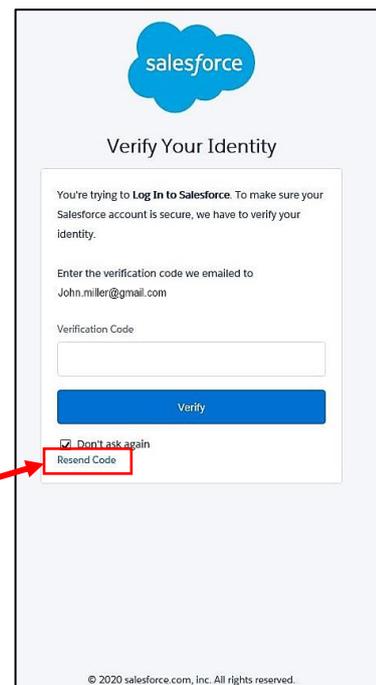
The **verification window** appears.

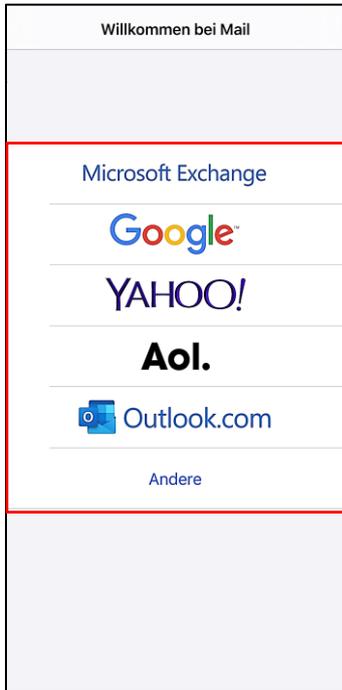
Do not enter the code yet, please proceed as described in the next step.

A **5-digit verification code** is required to ensure secure access.

Salesforce automatically sends a verification code via e-mail to the user's e-mail address.

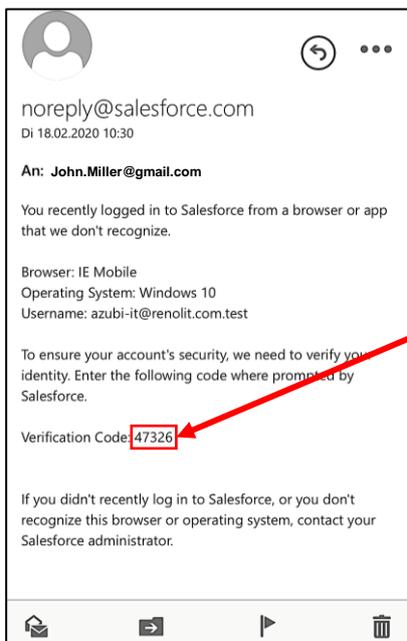
Please click **Resend Code** if you have not received an email within a few minutes - this will generate a new code to be sent to your e-mail address.





Open your **e-mail app** on your smartphone.

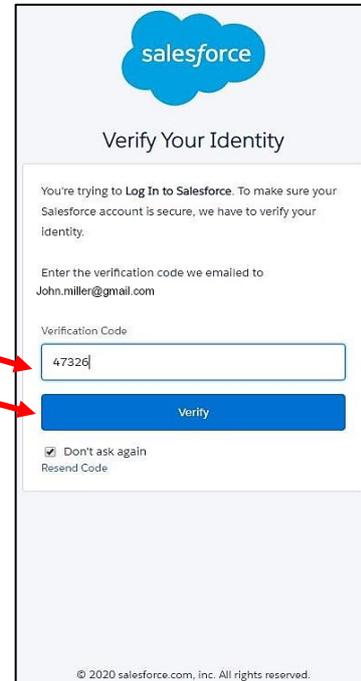
If you have not received an e-mail, please wait a moment and also check your **SPAM folder**.



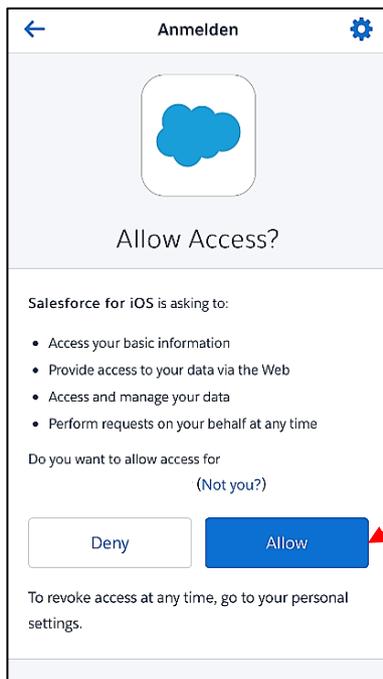
The e-mail (**noreply@salesforce.com**) contains a randomly generated **5-digit numerical code**.

Please **remember** this code for input, as you **cannot copy and paste** it.

Enter the code in the field provided and click on the **Verify** button.



The image shows a mobile screen for 'Verify Your Identity' on the Salesforce app. At the top is the Salesforce logo. Below it, the text reads: 'You're trying to Log In to Salesforce. To make sure your Salesforce account is secure, we have to verify your identity.' It then asks to 'Enter the verification code we emailed to John.miller@gmail.com'. There is a text input field containing '47326'. Below the field is a blue 'Verify' button. At the bottom, there is a checkbox for 'Don't ask again' and a 'Resend Code' link. A copyright notice at the very bottom reads '© 2020 salesforce.com, inc. All rights reserved.'



The image shows an iOS system dialog box titled 'Anmelden' with a back arrow and a settings gear icon. It features the Salesforce logo and the question 'Allow Access?'. Below this, it states 'Salesforce for iOS is asking to:' followed by a list of permissions: 'Access your basic information', 'Provide access to your data via the Web', 'Access and manage your data', and 'Perform requests on your behalf at any time'. It then asks 'Do you want to allow access for (Not you?)' and provides two buttons: 'Deny' and 'Allow'. At the bottom, it says 'To revoke access at any time, go to your personal settings.'

Now the window regarding **access** appears.
Click on the button **Allow**.

2. Navigation



In the following the general navigation within the Salesforce Chatter App is described.

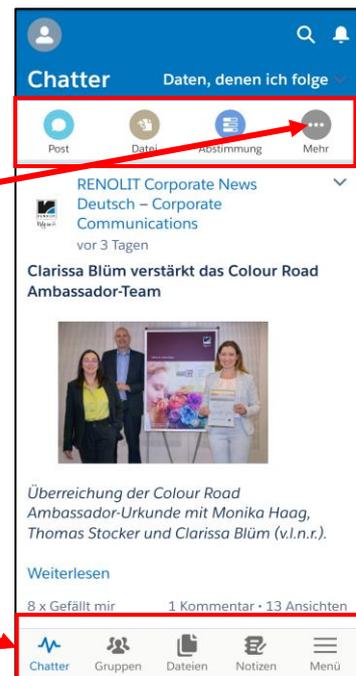
On start up you will see the **Chatter** area in the Salesforce App.

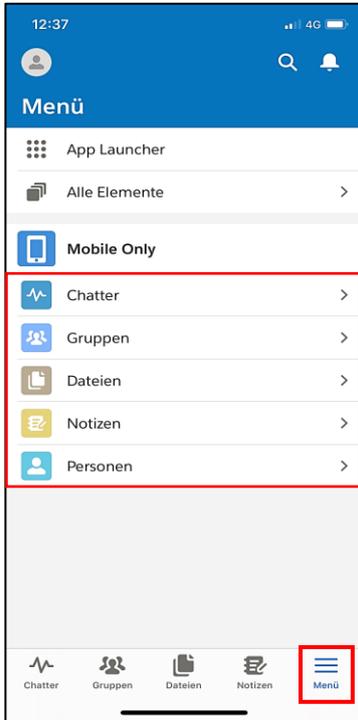
You will find the **action bar** at the top of most pages. Here you will see the three or four most relevant actions for the current data area.

Click on **More** to display all available topics.

The permanently visible **navigation bar** at the bottom of the screen allows access to all data areas (objects). Here you can open **Chatter, Groups, Files and Notes**.

You can also start the **menu**.

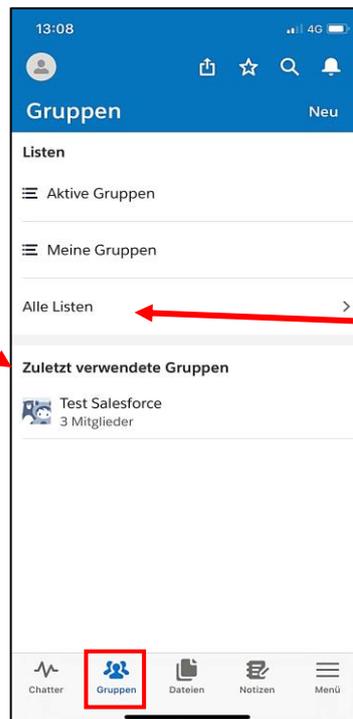




Click on **Menu** to display all available objects. **People** are also listed here.

Open an object by clicking on the symbol or the name.

After opening an object, you will usually see your **recently used** records in the lower part of the page.



Lists are available at the top of the screen. For example, the **Groups** object contains the **Active Groups** and **My Groups** lists.

By clicking on **All Lists**, you can open the complete overview of all available lists.



Click the **record info** in a list to open the **detail view**.

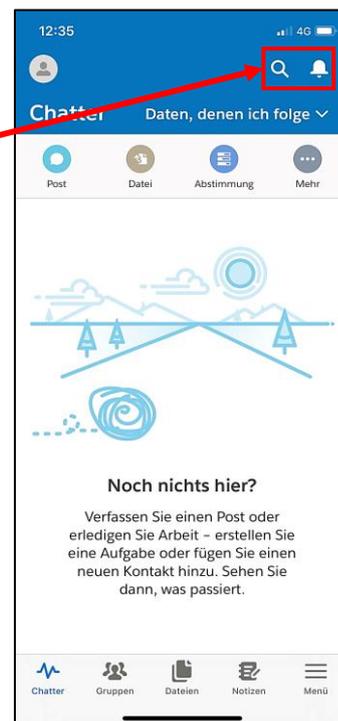
This is possible, for example, in the **Active Groups** list.

The action bar shows a selection of options, i.e. **Filter**, **Sort** and **New**.

You can retrieve your **notifications** via the **bell icon**.

You can find this icon on almost every page of the app.

The **magnifying glass symbol** allows you to start a **global search** in Salesforce. All data areas are automatically searched and results are displayed.



3. Overview Salesforce App data areas (objects)

3.1. Chatter



In the **Chatter** object you can see all **messages from groups** of which you are a member. You can leave a **like**, add a **comment** and also **create a new post** if the group's permissions allow.

For details see chapter:

4. interactions in Chatter

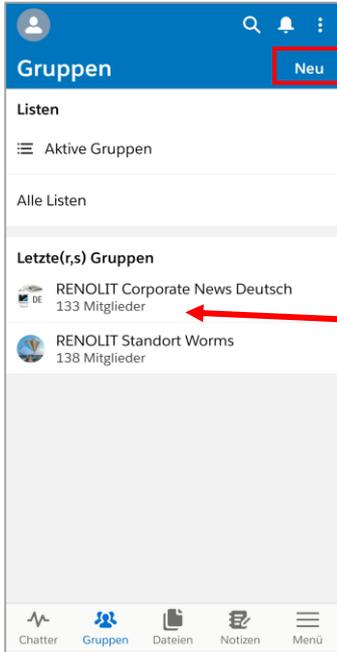
3.2. People

In the object **People**, the recently displayed people are shown.

All colleagues who use Salesforce Chatter are registered as People.



3.3. Groups



In the **Groups** object, the last used groups are displayed.

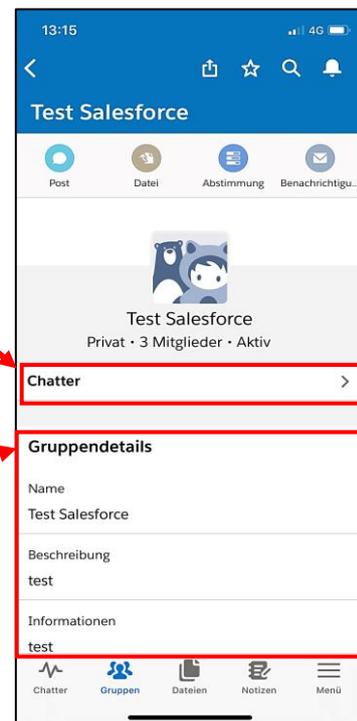
These include the groups **RENOLIT Corporate News German** and **RENOLIT Standort Worms**.

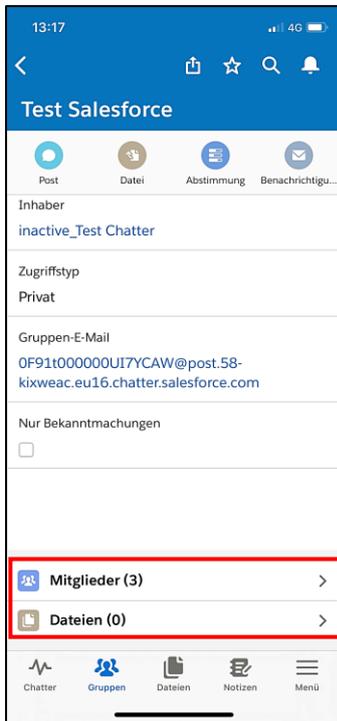
You can create your own group with colleagues by clicking on **New**.

Click on the group info to see the **group details**.

When you have opened a group, you can see the chat history of the group in the **Chatter** section.

In the **Group Details** section you can find a description of the group and the name of the owner.





Scroll to the end in the **Group Details** to see a list of the group **Members** and the posted **Files**.

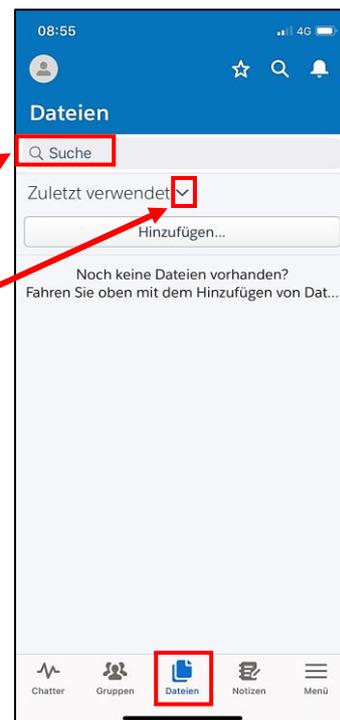
3.4. Files

By default, the **Files** object displays the **recently used files**.

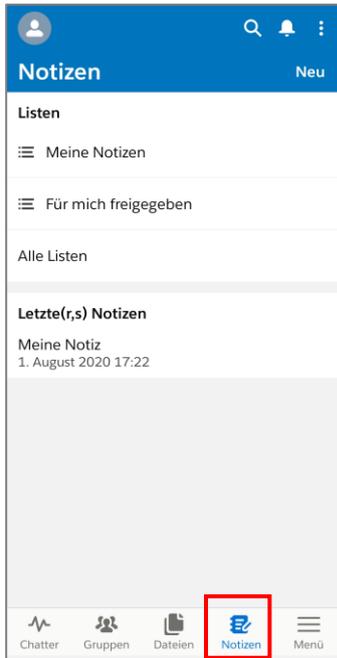
Files are often included in posts and are also visible in the Files object.

In the **search field** above you can search for files.

Click on **▼** to open another list.



3.5. Notes



In the **Notes** object, you can save and view private notes.

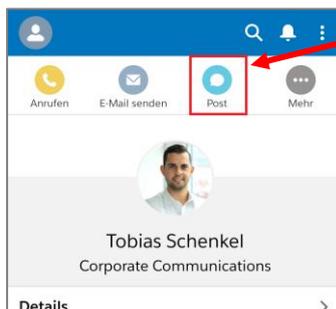
4. Interactions in Chatter

4.1. Creating Public Posts



In the **Chatter** object you can write a **public post** by clicking on **Post**.

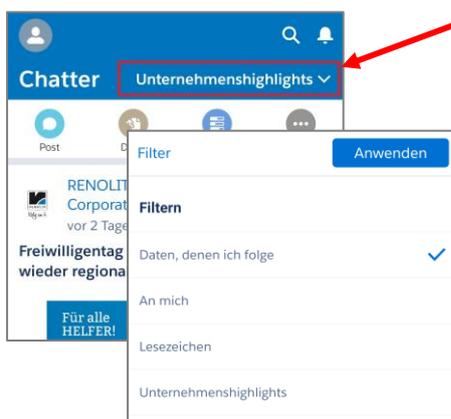
Note: A public post can be seen by all RENOLIT Salesforce users and is therefore NOT recommended.



It is also a **public post** if you share a message in the **People** object.

The post is visible **to this person** at "**Data I follow**" and "**To me**" in the chatter section.

All Salesforce users will see the post in the "**Company Highlights**".



You can also enter a post in a **Group**.

In a **public group**, the posts are **public**.

A post entered in a **private group** is only visible to the **group members**.

For details see chapter 4.3.

4.2. Liking and Commenting on Posts



Your Salesforce user has usually already been saved as a member of a location group, for example **RENOLIT Standort Worms** and the group **RENOLIT Corporate News English**.

Both groups have the following characteristics:

>**Public**: the groups are visible for everyone

>**Only announcements**: it is possible to like and comment, but not to write a post.

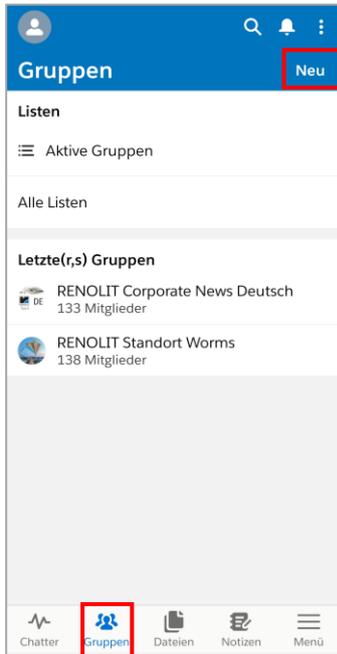
In the object **Chatter** you can see the posts. Below a post, you can click **Like**.

Click on **Comment** to open the window to enter text. Click on **Post** to publish the comment.



To see the **details** of the likes and comments, click **x Like / x Comment**.

4.3. Create a group / Ask a group to record and compose a post



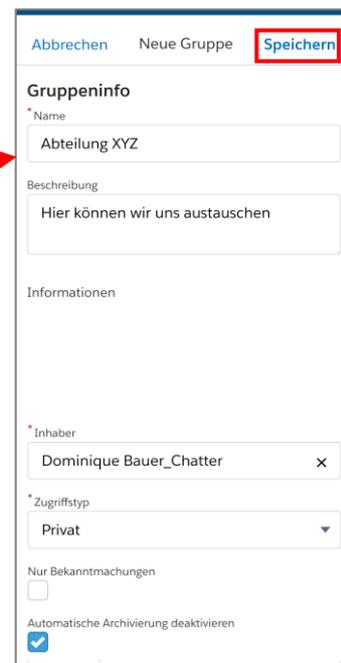
In the **Groups** object, you can create a new group by clicking on **New**.

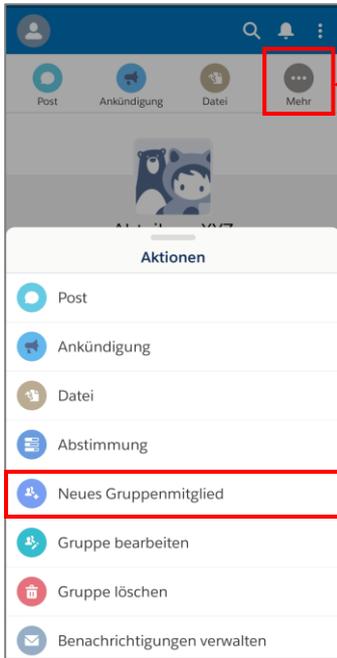
Enter **Name** and **Description** of the group.

Select the **Access Type** (Public or Private).

Check the box **Disable automatic archiving**.

Save the new group.

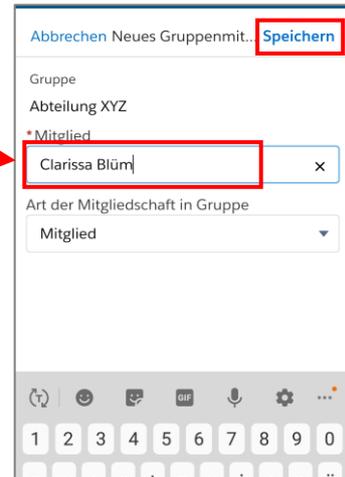


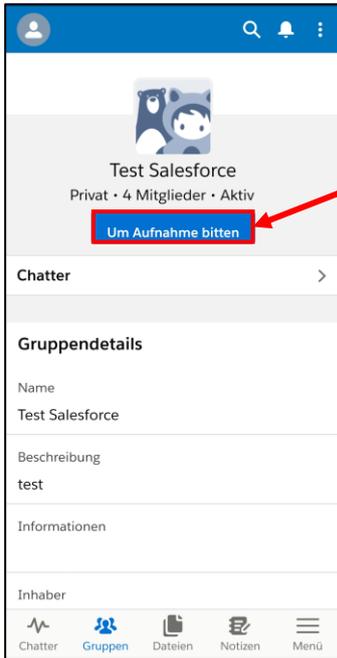


Open the new group, click on **More** and select **New Group Member**.

Enter the name of the **colleague** and click **Save**.

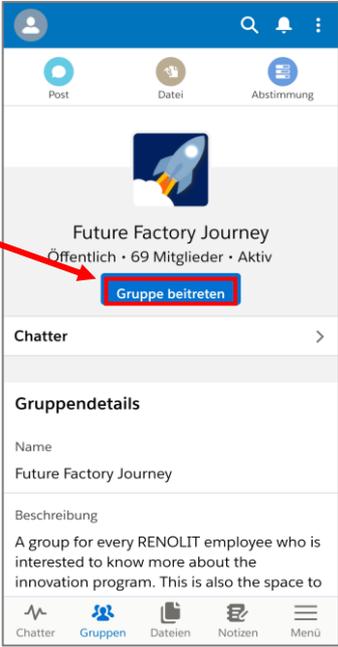
Repeat as necessary until all members are entered.

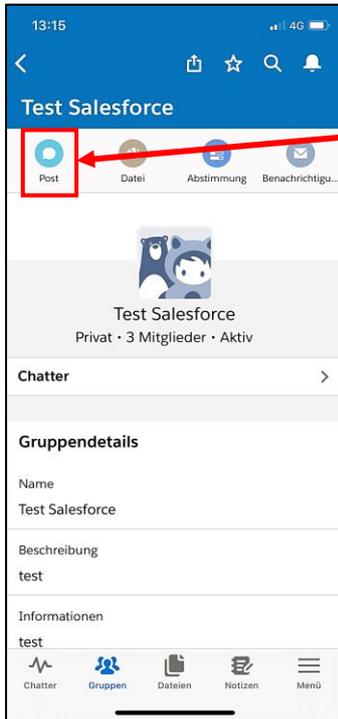




If you want to become a **member of a private group**, open the group and click **Ask to Join**.

There is a direct option for becoming a member of a **public group**. Click **Join Group**.



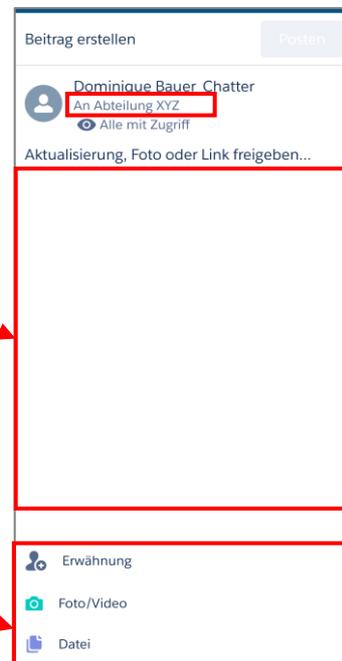


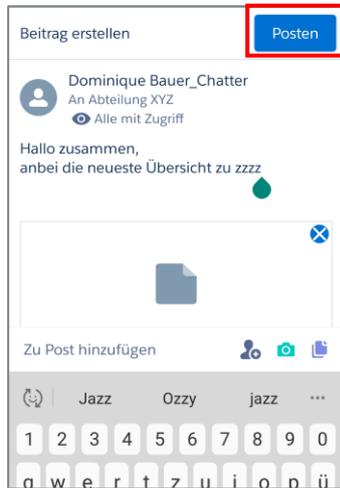
You can compose a message by **clicking on Post**, if you are the **owner** or **member** of a group, or if a public group allows posting.

In the **create a post** window you can see the **name of the group** in the upper area and create a **text message**.

Please follow the social media guidelines while creating posts.

In the lower area you can **add a person** to the post, insert a **photo/video** or attach a **file**.





Click on **Post** when complete.

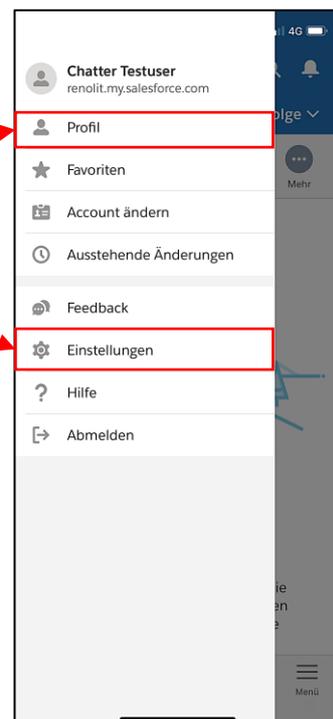
5. User settings

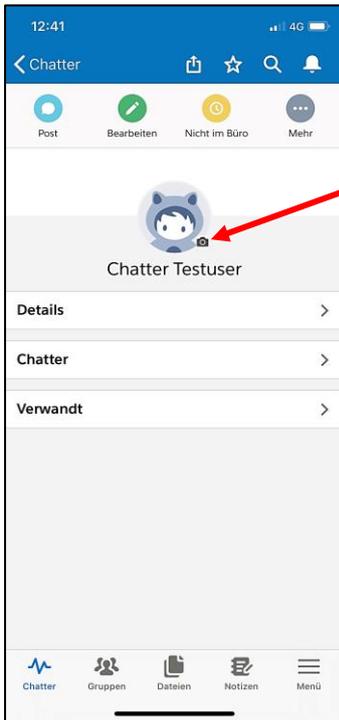
5.1 Edit profile and profile picture



Please click on your **avatar** (your picture) to edit your **profile** or switch to the app's **settings**.

A **menu** is displayed, including the items **Profile** and **Settings**.

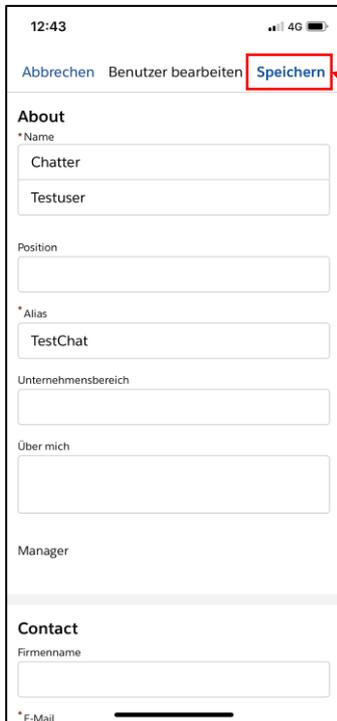




By clicking on **Profile** you can add a profile picture.

Click on **Edit** to amend or update your profile data.





12:43 4G

Abbrechen Benutzer bearbeiten **Speichern**

About

*Name
Chatter
Testuser

Position

*Alias
TestChat

Unternehmensbereich

Über mich

Manager

Contact

Firmenname

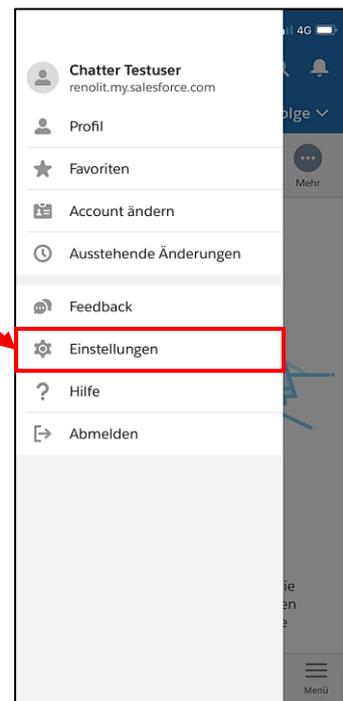
*E-Mail

You can edit and update your profile data at any time.

Save the changes.

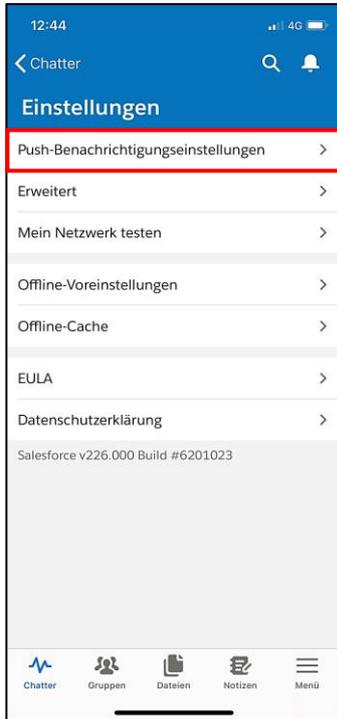
5.2 Activation of push notification

Click on your **avatar** (your image) and open the **settings** to enable push notifications.



Chatter Testuser
renolit.my.salesforce.com

- Profil
- Favoriten
- Account ändern
- Ausstehende Änderungen
- Feedback
- Einstellungen**
- Hilfe
- Abmelden

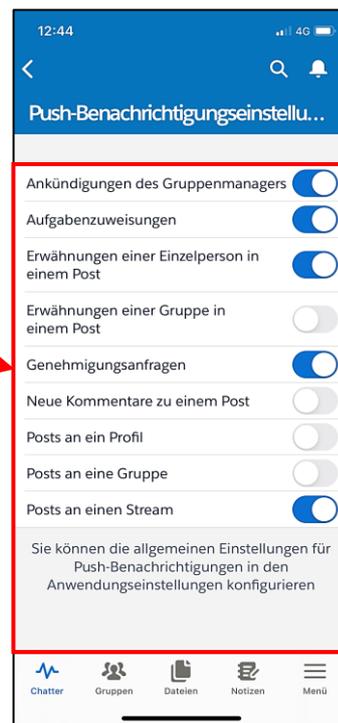


Click on **Push Notification Settings**.

In this menu you can customize the push notifications.

Switch the settings:

on (blue) or **off** (white).



6. Additional information

Please note that you will remain permanently logged in, even if the Salesforce App is closed!

Prevent data theft!
Always lock your smartphone when not in use!

If you have any suggestions or questions about this User Guide, please contact your local Salesforce Chatter representative, who will be happy to assist you.

For details on how to get started on your private Android phone, private iPhone or company iPhone, please refer to the respective guides.

*We hope you enjoy using **RENOLIT** Salesforce Chatter.*

Your Chatter Project Team