Florida SBDC Network: Salesforce New Session

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For Internal Use Only

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Introduction & Overview

Summary

Our existing Session entry processes are largely from delivered Salesforce functionality and would only validate data after a user attempted to commit a record to the database. This resulted in a frustrating end-user experience that made it more difficult to quickly enter data than necessary. Another issue, brought about by users cloning Session records, caused reporting issues to SBA that needed manual intervention to correct. The new interface hopes to address those concerns by providing a streamlined method for recording both Session and Client Milestone records. Key features of this new process include:

- Data validation is done *before* data is being written. This provides real-time error checking and prevents having to re-enter data due to an unforeseen error.
- When generating a Milestone (either as part of creating a new Session or as a discrete operation on an existing Session record) all lookup fields are automatically associated between Session and Milestone, Contact, and Account (Business).
- Users will be able to add multiple files to a Session or Milestone record from within the Session entry interface. Which eliminates some page loads and clicking.
- If a user has uploaded a PDF to a Client Milestone in the interface, they will be able to send the Milestone to their region's approval queue directly.

The method to generate a new consulting session can be invoked from either a Business record or an ERFC record and all other methods of generating a Session record (clicking New on a list view, cloning an existing session record, the New Session button on contact records, etc.) will be retired. Only one session may be added from an ERFC. Once you have done so, the button will no longer be available on that ERFC record and Sessions must be added from the Business record.

As we realize that some clients will report an "In Business" status while not actually being in business (or vice versa), you will be able to convert them back to pre-venture from the RFC. When working with pre-ventures, you will be able to convert the business to "In Business" during the new session entry with or without a new business start milestone. In order to update records, Session Status must be Completed. Any other Session Status will create a Session record but it will not update the Business record until it is Completed.

The method to generate a new milestone record can be invoked during the same operation that generates a Session record (***only*** if **Status** equals *Completed*) or on a Completed Session record page that has not yet been associated with a Milestone. Similar to with Sessions, all other methods of generating a Milestone record will be retired.

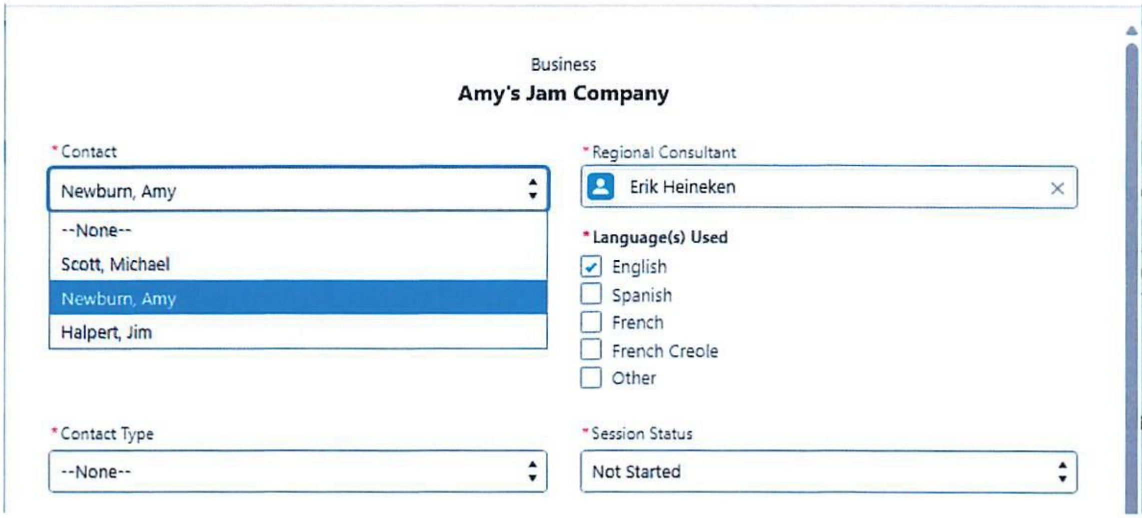
This ensures the data validation and correction methods introduced in this new process function as expected. Please note that, if a business record does not have an ERFC record, or the ERFC is outdated, the system will no longer allow a user to generate a session record until a new RFC is obtained.

Session Entry

This process supports adding sessions with or without a milestone as a single, guided flow. These new processes aim to make it easier to record information quickly by pre-filling as many fields as possible and automatically handling all necessary record relationships to ensure all records are properly linked for reporting purposes. Details on entering a Session with a Milestone are available in the last section of this document.

The New Session screen flow can be called from the Business record or an ERFC record (limit once per ERFC record).

Any field marked with a red asterisk (*) are fields that are required regardless of the Session Status and must have a value. Some fields will require another field to be set before you can select your options, like Area of Consulting (AoC) and Sub AoC. These will only be available once you have chosen a program of service.

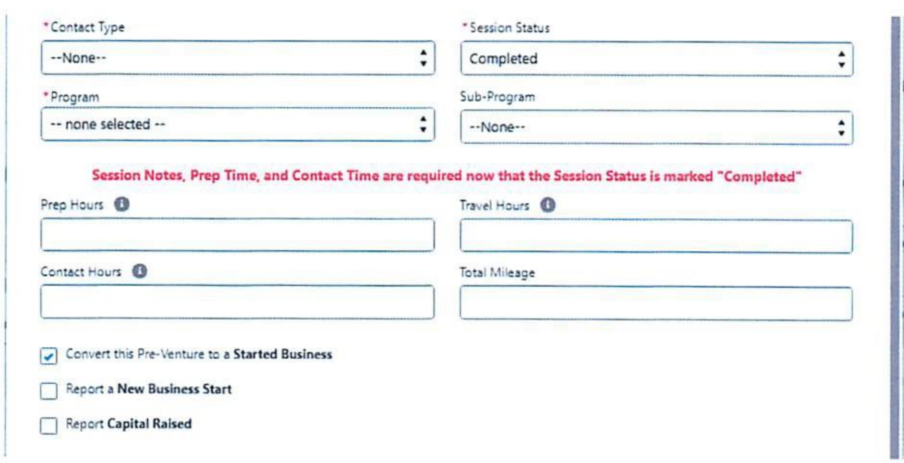


The New Session flow will pre-fill the Contact field with the Primary Contact of the Business record. If a Business has more than one Contact associated with it, users may select one of those Contacts from the drop down menu. This pre-populated list prevents accidentally selecting the wrong Contact because of similar names.

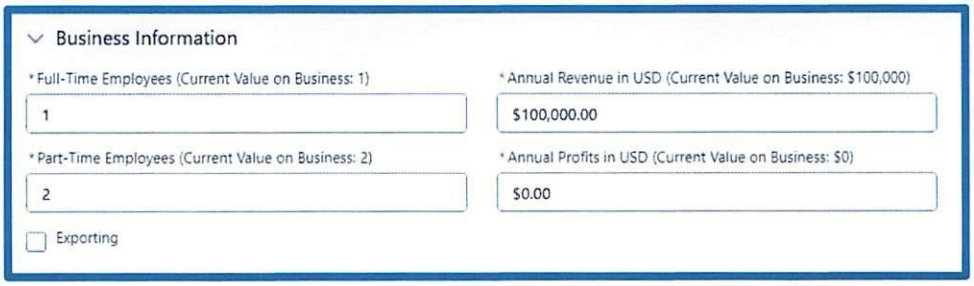
Note: If a Business does *not* have a Primary Contact, users will need to return to the Business record page and update that field. A Business without any related Contacts will need to have a Contact related to them before a Session can be generated.

The Regional Consultant for the Session defaults to the logged in user. If you are entering a Session on behalf of another user, pressing the 'X' at the far right of the field empties this field and allows you to search for another active user instead.

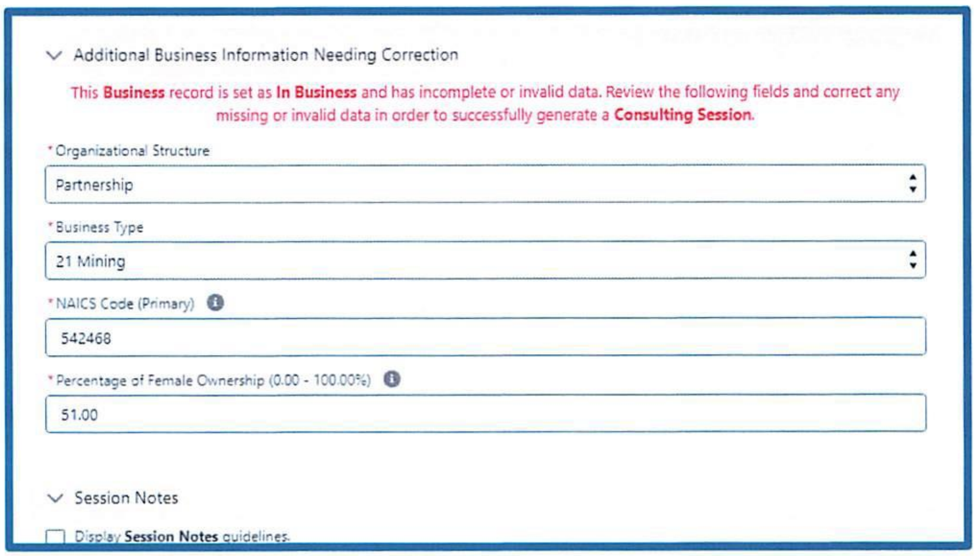
The Language(s) Used field defaults to English, but can be changed and supports multiple selections.



If the "Session Status" field is set to Completed, you will be required to have both contact and prep hours. Each field must be set and the sum of both must total to greater than 0.



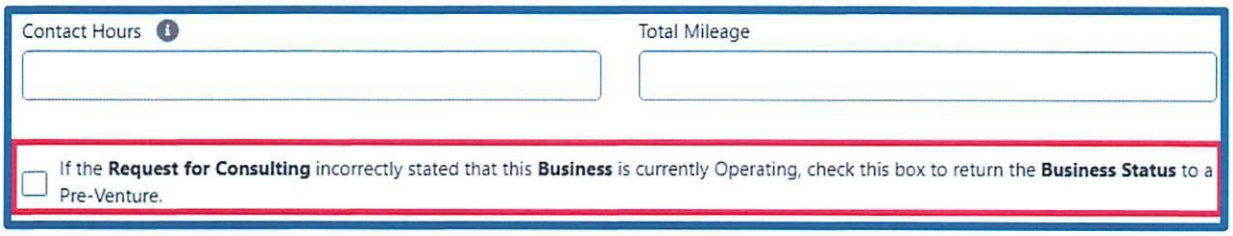
The fields in the Business Information section are pulled directly from the Business record that was being viewed when the user initiates the New Session dialog. The Business Information section contains Employment and Revenue numbers as well as Exporting data for applicable "In Business" clients. You may update these fields if needed and they will be written to the Business record when the Session is generated and marked as Completed. If a Business record indicates the business is not yet operating, this section is not displayed.



If a Business record has a Status of "In Business" and is missing data in certain fields (Organizational Structure, Business Type, NAIC Code (Primary), or Percentage of Female Ownership), you will be presented with an additional section and required to correct the data.

Note: If the NAICS Code (Primary) value does not match the appropriate industry selected in the "Business Type" field, you will be required to enter an appropriate NAICS code or change the Business Type to match the NAICS code before you may continue.

If the client is exporting, you will see the section for exporting. The fields will be populated with the information from the business. You may change exporting employees or export sales. If you select the "Yes. The Countries of Destination have changed" you will be presented with a list of countries when you advance to the next screen. Remember, only Sessions with status "Completed" will update the Business record.



If you are adding a Session from an ERFC and find that the client stated they were in business but they are actually not in business yet, you can change them back to pre-venture. You would check the box that begins with "If the request for consulting incorrectly stated……". Once the session is completed and submitted this will remove the employment, sales, and open date and then set the business record to "Not yet in Business".

Session Notes

Display **Session Notes** guidelines.

SESSION ATTACHMENT(S)

Please include a description of any files attached to this session, i.e. client release form for success stories, for easier document identification.

DESCRIPTION OF BUSINESS & OWNERS

Please include a brief description of the business and owners in initial sessions and as appropriate when changes to the business and ownership have occurred.

*ANALYSIS OF PROBLEM/OPPORTUNITY

This mandatory session note encompasses:

- Assistance requested
- Questions answered
- Identification of other problems to be considered/red flags
- Ideas brainstormed
- Resources identified

*RECOMMENDATION(S)

This mandatory session note encompasses:

- Directions given
- Warnings or cautions
- Lessons taught
- Resources revealed/referrals
- Ideas floated
- Websites visited
- Forms reviewed

*NEXT STEPS REQUIRED BY CONSULTANT AND/OR CLIENT

This mandatory field encompasses next steps or actions decided during the meeting, including a list of any deliverables decided.

IMPACT ONLY - SUMMARY OF CONTRIBUTION TO IMPACT

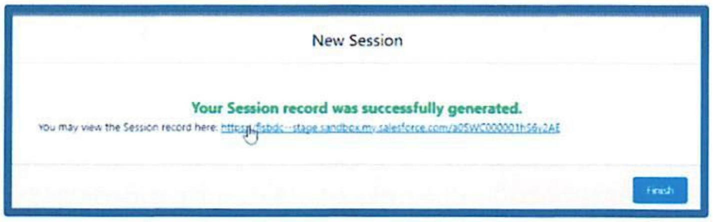
When reporting impact, please include a summary of the assistance provided that led to impact.

Session Notes

The Session Notes section contains a checkbox to display the template and guide for Session Notes entry that is described in the Standard Operating Procedures manual. The check box is unchecked by default. The rich text entry box for Session Notes is pre-filled with the template.

The last section contains a checkbox related to Artificial Intelligence. If the application of Artificial Intelligence was discussed in relation to a problem facing the business, regardless if it will be implemented or not, check the box labeled "The session included consulting on Artificial Intelligence".

Here you may also add files to the session. **Do not add files for milestone attribution here**. There is a separate section of the milestone entry form that will allow you to attach the attribution to the actual millstone record. Only attach files for sessions here. The interface will display the name and file-type of items you are attaching. You may also remove them from the list of files to upload by clicking the "X" next to their names.



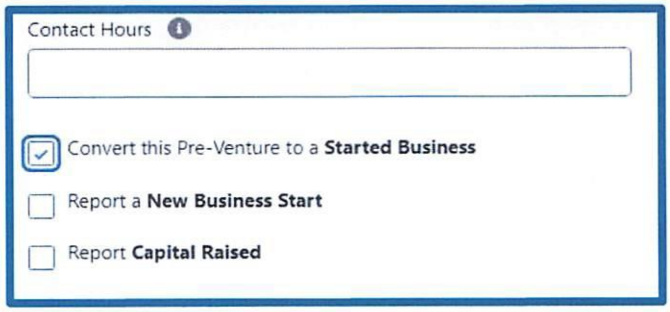
Upon clicking "Next" you will be presented with the above success message, a link to the newly created Session, and the option to close the dialog box by selecting "Finish".

Note: If at any point during this process you receive an error message, please copy the error text or take a screenshot and contact the Salesforce Administration Team.

Milestone Entry

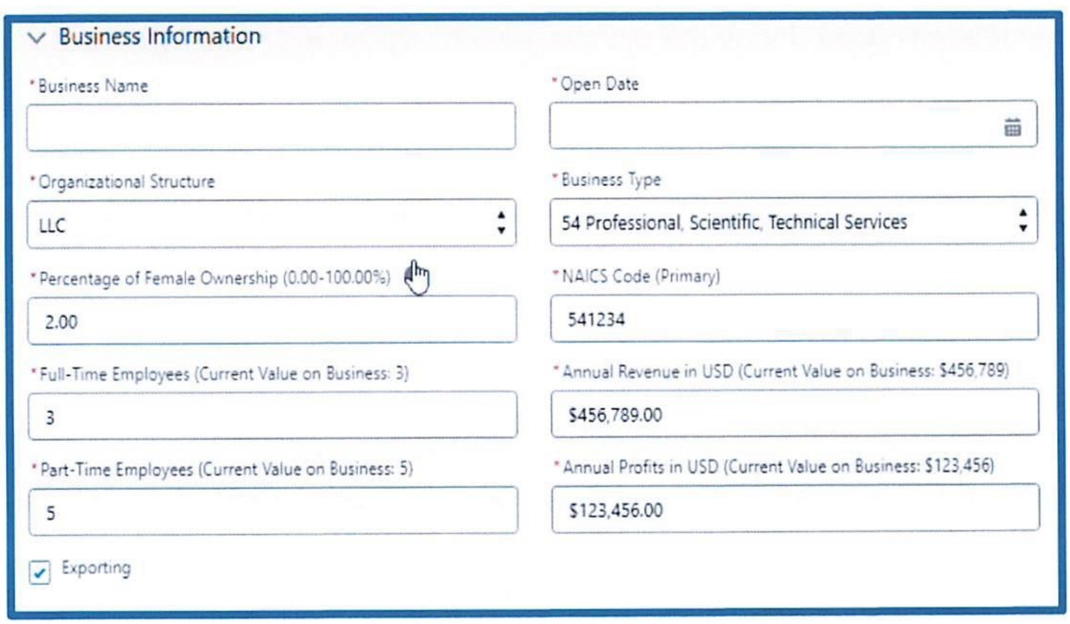
Enter Session with Milestone – SBDC Pre-venture Client

This section explains generating a Client Milestone for Session Program value of SBDC directly after generating a Session when the client is a pre-venture (Not Yet in Business). Enter a session as described in the previous section "Enter Session without milestone". Don't forget, only Completed Sessions will update the Business record and allow for Milestone entry. For more information on Client Milestones / Reportable Impact (what qualifies, attribution requirements, etc.), please refer to the Standard Operating Procedures manual.



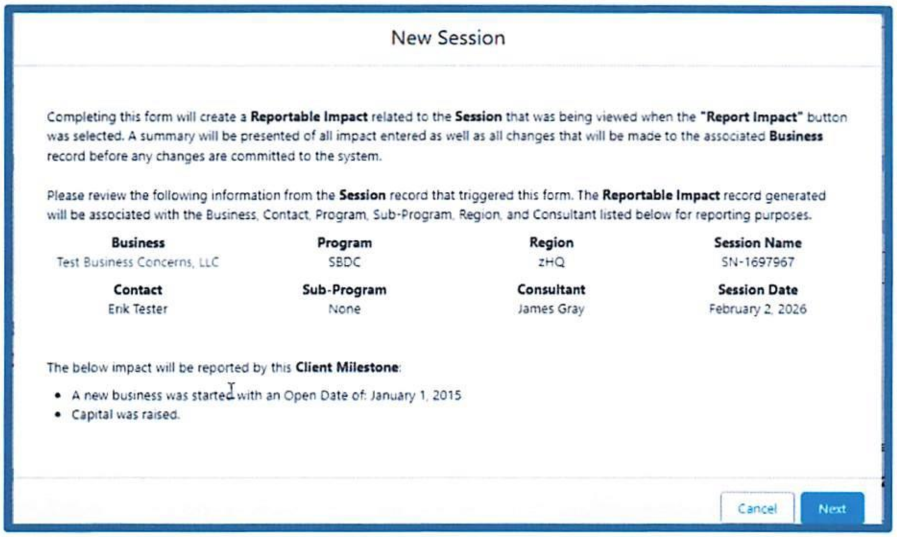
If the Session is Completed, the above options will become available on the Session entry form. This allows a consultant to set the Business record Status to "In Business" without generating a Milestone and claiming Impact. This is for correcting or updating Business Status when the information submitted by the client was incorrect or they are not willing to sign an impact form attributing their Business start to the Florida SBDC Network's aid.

"Report Capital Raised" is another impact type that is available to Pre-Ventures. It is not necessary to convert a Pre-Venture to In Business or claim a New Business Start to report Capital Raised, but the option to do so is available.

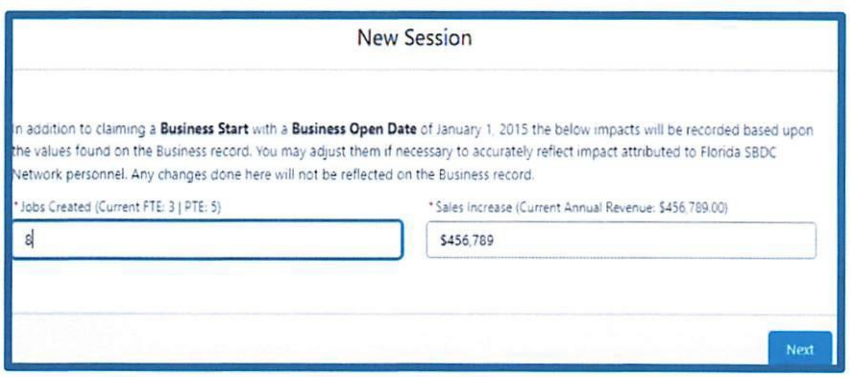


Checking the "Convert this Pre-Venture..." box (whether claiming a New Business Start or not) will expose additional fields (Business Start Date, Full- & Part-Time Employees, Annual Revenue and Annual Profits/Losses, etc.). These fields must have values (even if they are 0) and the total of employees (both Full- & Part-Time) must be at least 1. Business Type must have an appropriate matching NAICS Code (Primary) value.

After pressing Submit a Session record is generated and the Client Milestone input will be displayed. The first page will display a summary of the Session that was generated as well as the type(s) of impact you selected during Session creation.

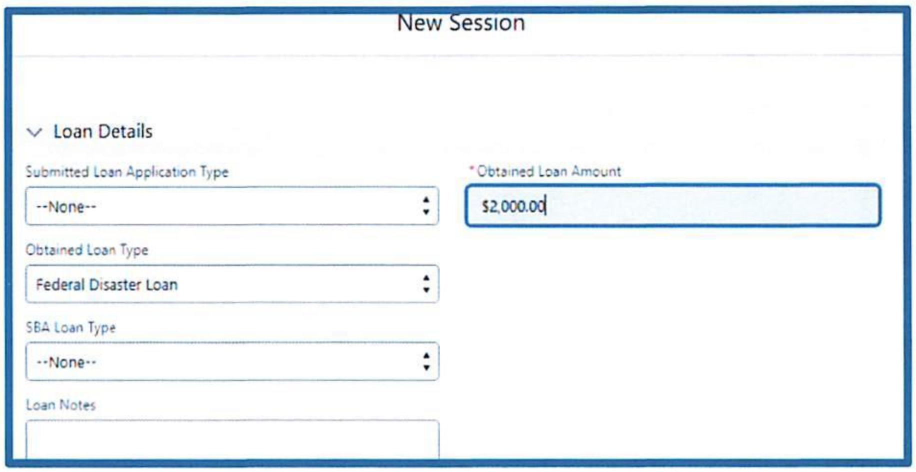


Press the "Next" button to continue. Selecting "Cancel", will close the dialog box to generate a Milestone, but a Session has still been created. The method to generate a Milestone from an existing Session is presented later in this document. These instructions assume that a pre-venture is being update to "In Business" and both "Report New Business Start" and "Report Capital Raised" were selected.



If "Report a New Business Start" the next page will ask for Jobs Created and Sales Increase. Jobs Created and Sales Increase must be equal or greater than 0. Please remember that jobs created can not be more than employment and sales increase can not be greater than annual revenue. Both values are displayed here and reflect the current values on the Business record.

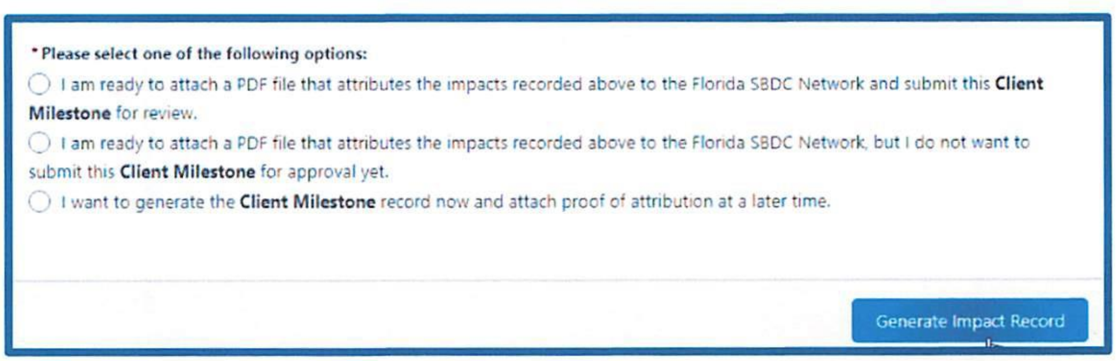
If "Report Capital Raised" was selected, the page below will collect the details. Continuing to the next page will display a summary of all impacts entered. If required, changes can be made here before the Milestone is generated.



One of the three choices must be made before generating the Milestone Record.

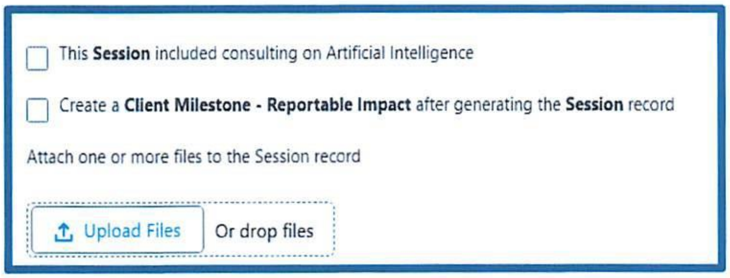
1. Create Milestone, attach PDF attribution file and submit for approval.
2. Create Milestone, attach PDF attribution file but do not submit for approval.
3. Create Milestone, do not attach PDF file or submit for approval.

If options 1 or 2 are chosen, a PDF attribution file must be attached before continuing. Select "Generate Impact Record" to continue.

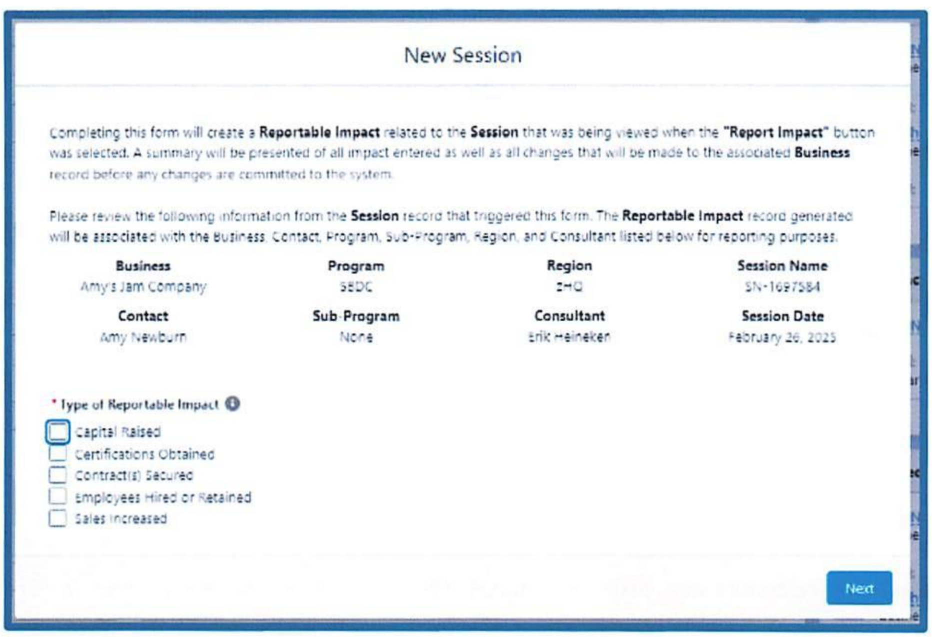


Enter Session with Milestone – SBDC Operating Client

This section explains how to generate a Client Milestone for Session Program value of SBDC directly after generating a Session when the client business is operating. Don't forget, only Completed Sessions will update the Business record and allow for Milestone entry. For more information on Client Milestones / Reportable Impact (what qualifies, attribution requirements, etc.), please refer to the Standard Operating Procedures manual.



If the Business Status is "In Business", the option to "Create a **Client Milestone – Reportable Impact** after generating the **Session** record" will become available. When this checkbox is selected, the Session Summary screen will be displayed immediately after the Session is generated. Here is where the types of impact are selected. Users may select any number of available impact types. Only screens and fields related to the selected impact will be shown on the subsequent pages. Examples of the input screens follow.



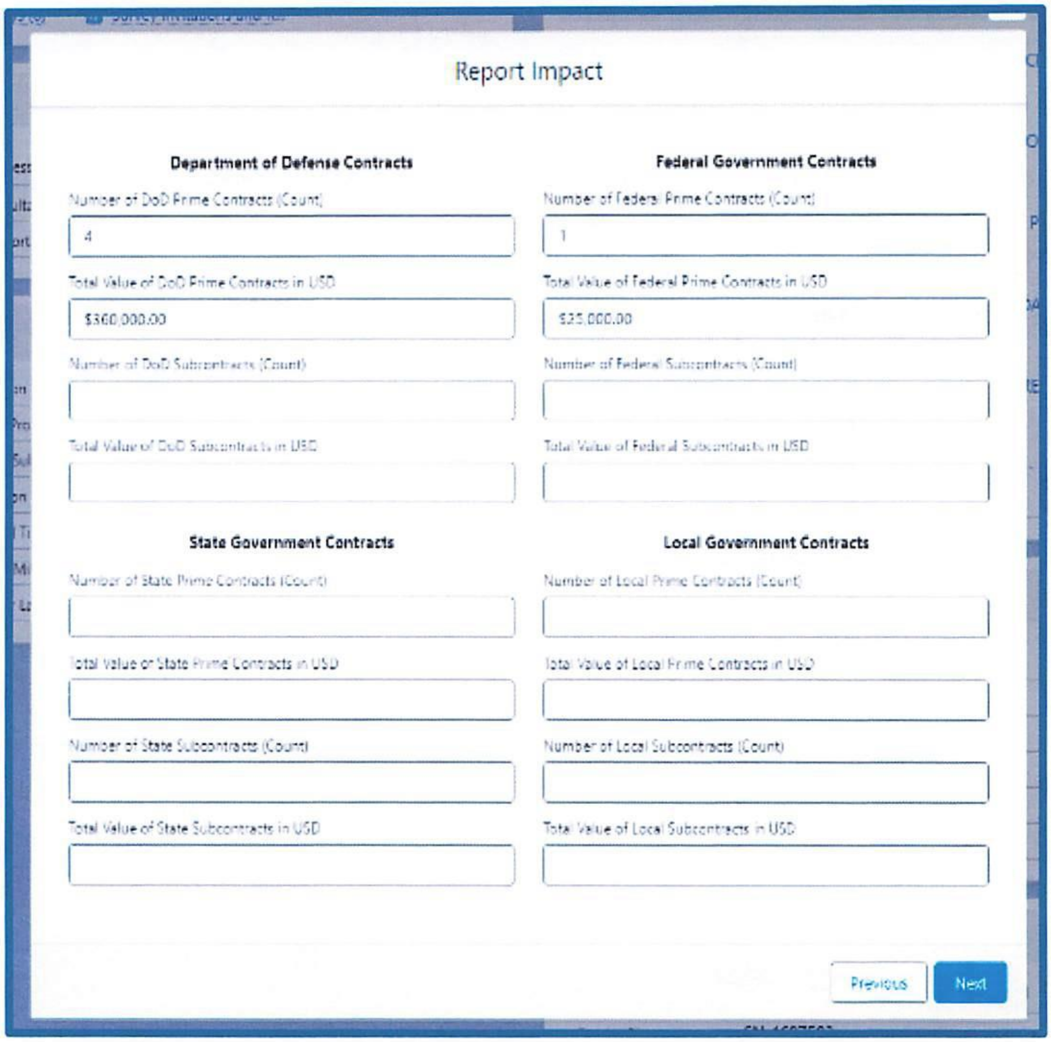


Figure 1- The Government Contracts Screen

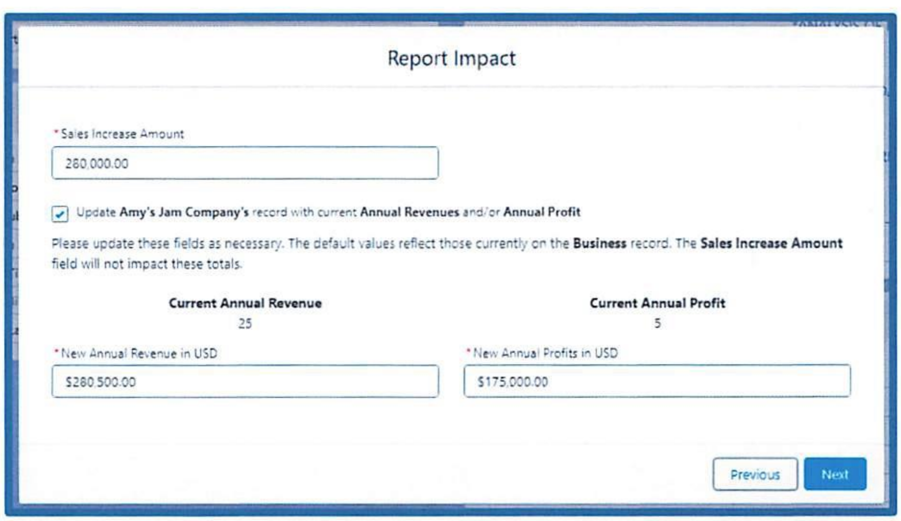


Figure 2 - Sales Increase Screen. Annual Revenue and Profits may be updated on the Business record here if needed.

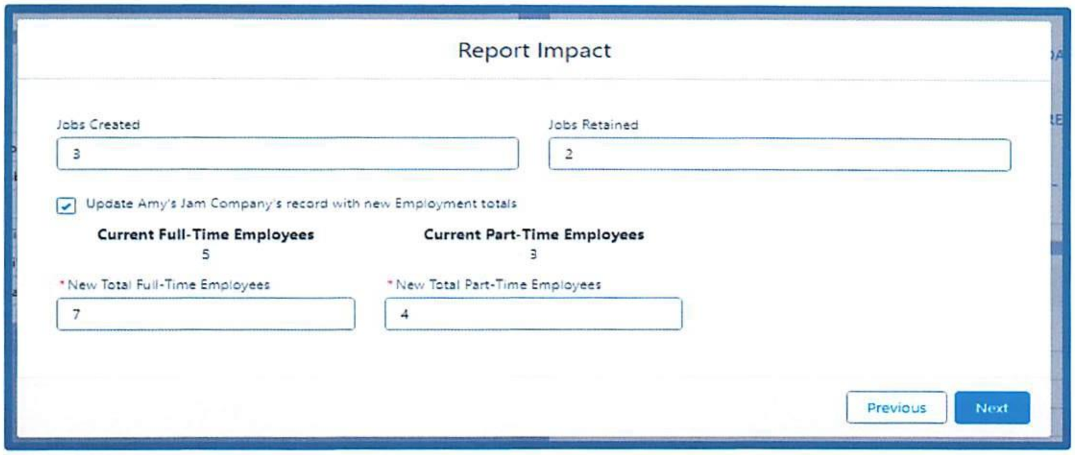


Figure 3 - Employment Screen. Current Full- & Part-Time Employees may be updated on the Business record here if needed.

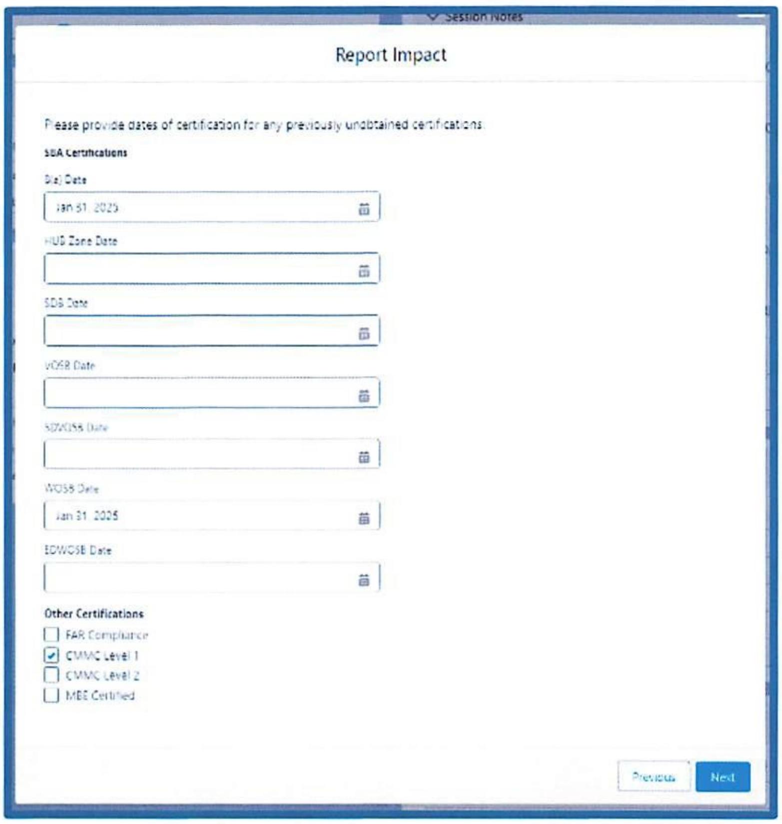


Figure 4 - Certifications Screen. Dates are now required for certain certifications.

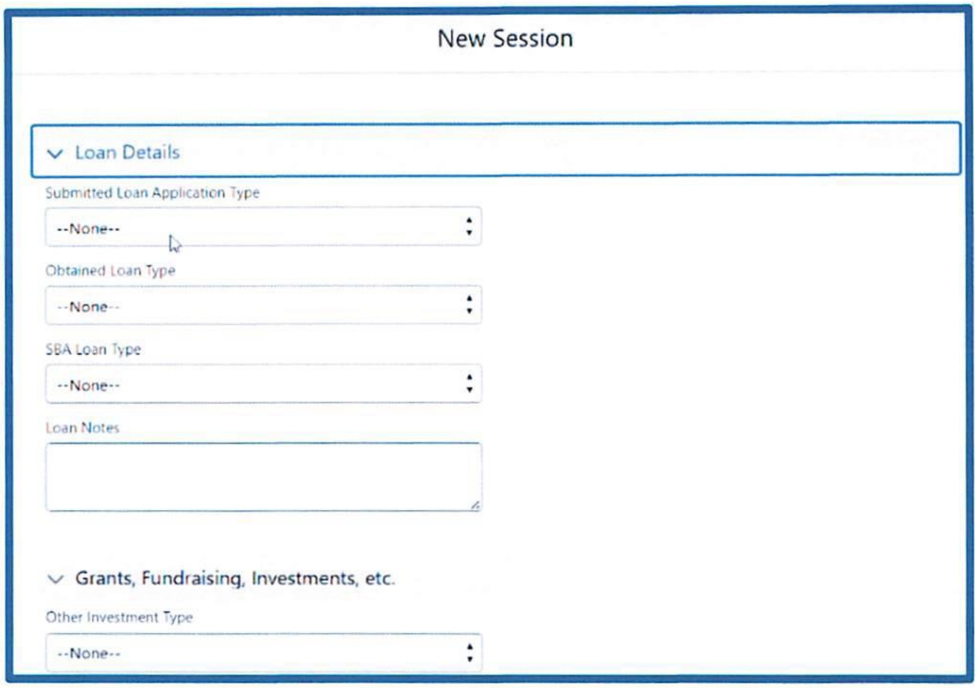


Figure 5 - Capital Access Screen

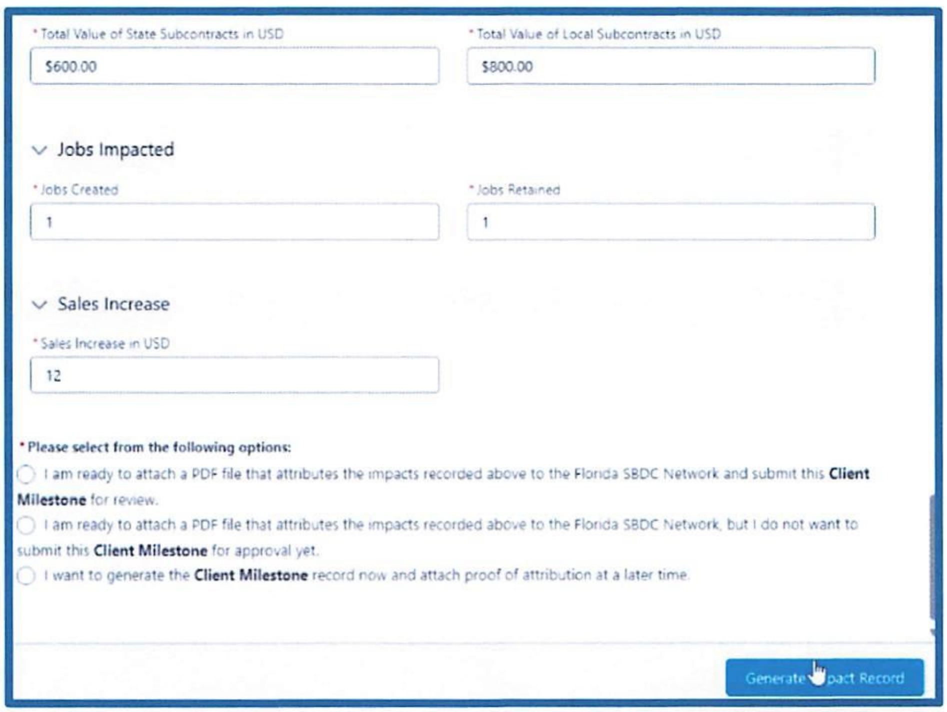
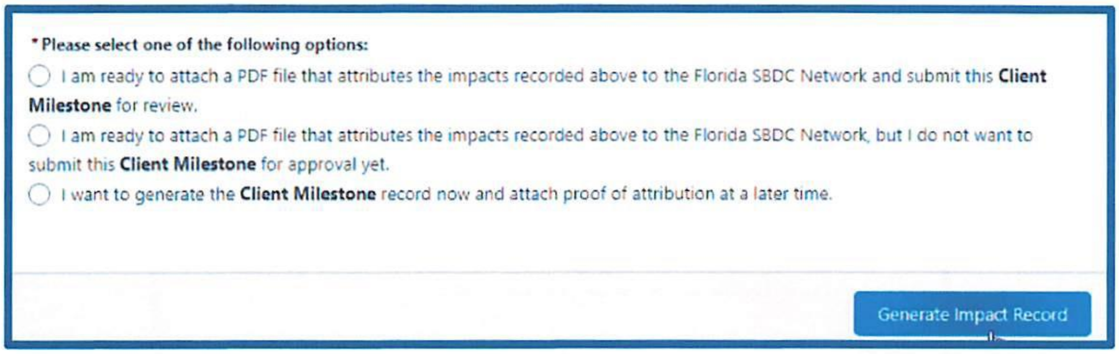


Figure 6 - The final page presents a summary of all impacts recorded. Please review the information for accuracy and make any necessary corrections.

One of the three choices must be made before generating the Milestone Record.

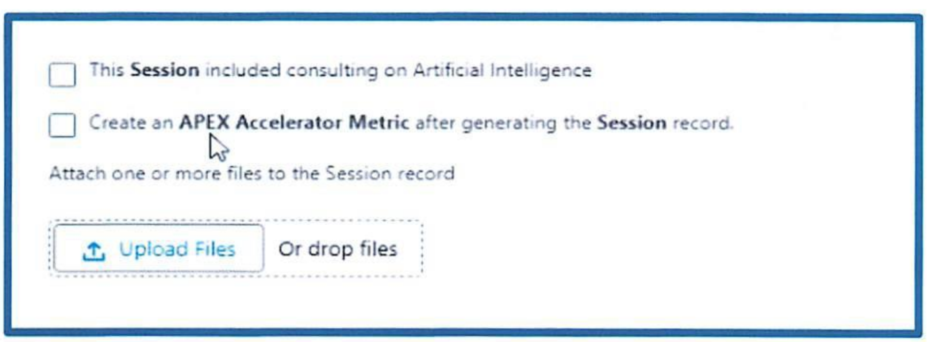
1. Create Milestone, attach PDF attribution file and submit for approval.
2. Create Milestone, attach PDF attribution file but do not submit for approval.
3. Create Milestone, do not attach PDF file or submit for approval.

If options 1 or 2 are chosen, a PDF attribution file must be attached before continuing. Select "Generate Impact Record" to continue.

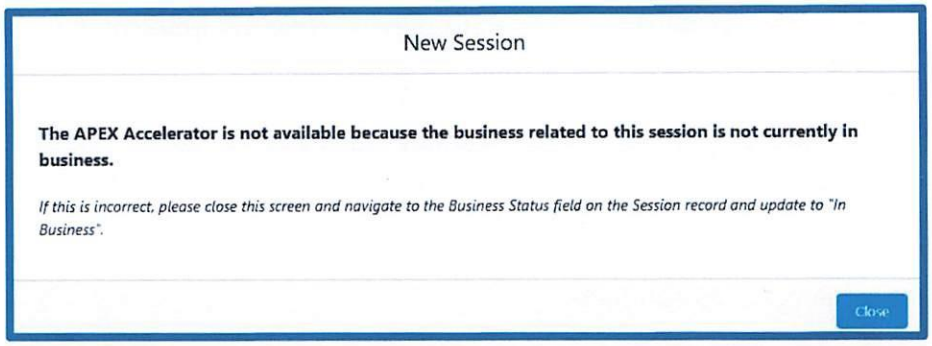


Enter Session with APEX Metric, with or without Milestone

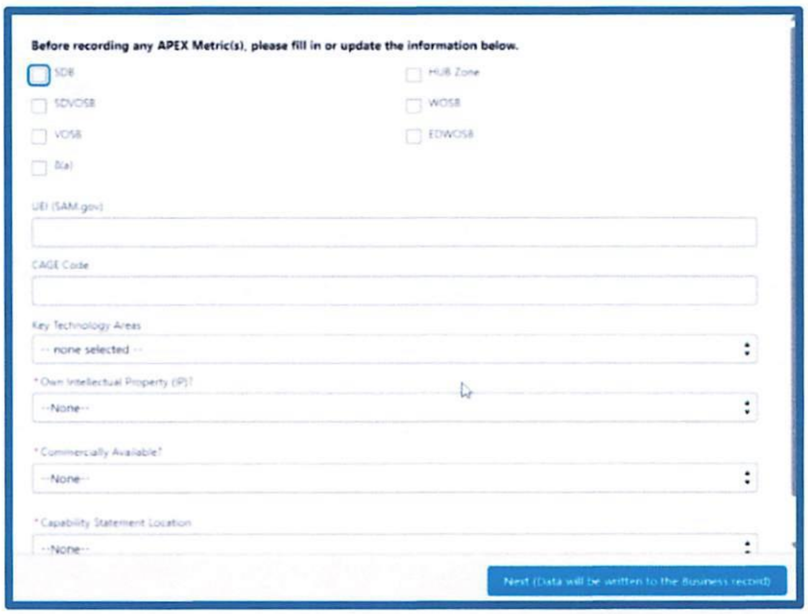
This section explains generating a Client Milestone for Session Program value of APEX directly after generating a Session and/or APEX Metric. when the client business is "In Business". Enter a session as described in the previous section "Enter Session without milestone". Don't forget, only Completed Sessions will allow for APEX and/or Milestone entry. For more information on Client Milestones / Reportable Impact (what qualifies, attribution requirements, etc.), please refer to the Standard Operating Procedures manual. For more information on APEX Milestones, please see the APEX Supplement of the Salesforce User Manual.

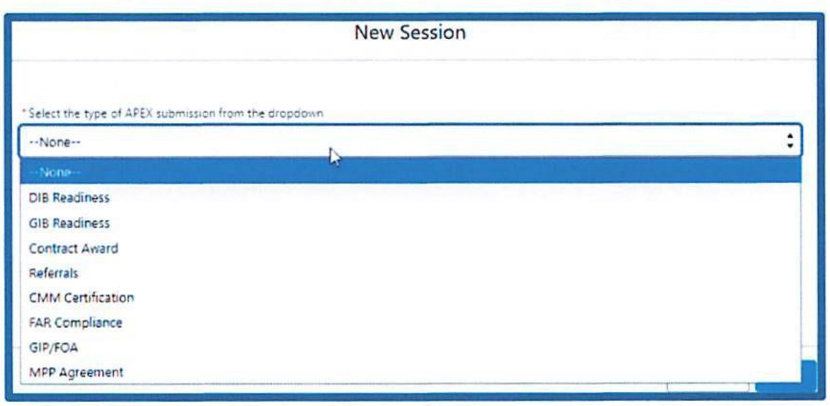


The Key Performance Indicators for the APEX Accelerator program require that a business is currently operating. Therefore, Sessions of Program APEX will not be able to add milestones for pre-ventures.



Once you click next to generate the session, you will be presented with forms to enter the APEX metric and contracts. First you will be presented with APEX metrics. This functions exactly as if the user attempted to add an APEX Metric to an existing, completed Session.





If Contract Awarded was selected, immediately after the APEX metric is filled out (Federal, state, etc.) a milestone is generated automatically as the system currently does.