

Customer Group Quick Create Button

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With 1 click, you can create a customer group, invite all contact roles, and add the sales team!

Share

Opportunity
Universal Telco-500 Widgets

Customize Page | Edit Layout | Printable View | Help for this Page

Show Chatter Following

Back to List: Accounts

Contact Roles [1] | Sales Team [1]

Opportunity Detail

Opportunity Owner: John Kucera [Change] Amount: \$200,000.00
Private: ☐ Close Date: 10/31/2011
Opportunity Name: Universal Telco-500 Widgets Stage: Prospecting
Account Name: Universal Telco Probability (%): 10%

Edit Delete Clone **Create Customer Group**

Contact Roles

Action	Contact Name	Account Name	Email	Phone	Role	Primary
Edit Del	Bob Jones	Universal Telco	bob.jones@gmail.com		Decision Maker	☒

Sales Team

Action	Team Member
Edit Del	Fred Tate

John Kucera invited you to group Universal Telco at Acme

Inbox x

John Kucera via Chatter noreply@chatter.salesforce.com
to me



John Kucera at Acme invited you to join the Chatter group **Universal Telco**. Join to access the group's updates and files, and collaborate with other group members.

Join this group

Join Now

To accept this invitation, click this link: https://na12.salesforce.com/ChatterSignup?r=U_QEctIdsoPe2LIRDZB.QTyhPsgRv5Qr4M5b7XUOKjt.B9qMreRvsCRUsW7IL98DpUpCxbSsv0zV7upfTUjPFOq4Xl1.v7e5HzazAzCky5x5B1316o0O2dpcPqAhcAAkWN0AU9

Check out some great ways to use Chatter: <http://www.salesforce.com/chatter/gettingstarted/>

San Francisco, CA, 94105, United States

Chatter > Groups > Universal Telco Private

Share with Universal Telco

Attach File Link

Share

Sort by: Post Date

John Kucera created this group.
Today at 3:52 PM - Comment - Like

What To Do Next

- Watch a short video
- Complete your profile
- Invite people
- Create a group
- Set group email alerts
- Get Chatter Desktop
- Get Chatter Mobile

Members Show All (2)

DEEDED VALUE

Information

Add Information

Description

Add Description

Fred Tate
Sales Manager

Follow
Send a message

CUSTOMER Fred Tate

No customers have been added to this group.

chatter
Collaboration Cloud

To setup the app, go to your Opportunity Page Layout, and add the button



Opportunity
Universal Telco-500 Widgets

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Customize **1** Edit Layout Printable View | Help for this Page

Show Chatter Following

Back to List: Chatter Groups

Contact Roles [1] Sales Team [1]

Opportunity Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields **Buttons** Custom Links Visualforce Pages Related Lists

Quick Find Button Name

Clone Clone Sharing Create Customer G... Submit for Approval Delete Edit

Opportunity Sample

Highlights Panel

Customize the highlights panel for this page layout...

Opportunity Detail

Standard Buttons Edit Delete Clone Sharing Custom Buttons

Opportunity Information (Header visible on edit only)

Opportunity Owner	Sample User	Amount	\$123.45
Private	✓	Close Date	11/14/2011
Opportunity Name	Sample Opportunity Name	Stage	Sample Stage
Account Name	Sample Account	Probability (%)	491%

Opportunity Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields **Buttons** Custom Links Visualforce Pages Related Lists

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Opportunity Sample

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Customize the highlights panel for this page layout...

Opportunity Detail

Standard Buttons Edit Delete Clone Custom Buttons

Custom Button: Create Customer G...

Opportunity Information (Header visible on edit only)

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Private	✓	Close Date	11/14/2011
Opportunity Name	Sample Opportunity Name	Stage	Sample Stage
Account Name	Sample Account	Probability (%)	491%

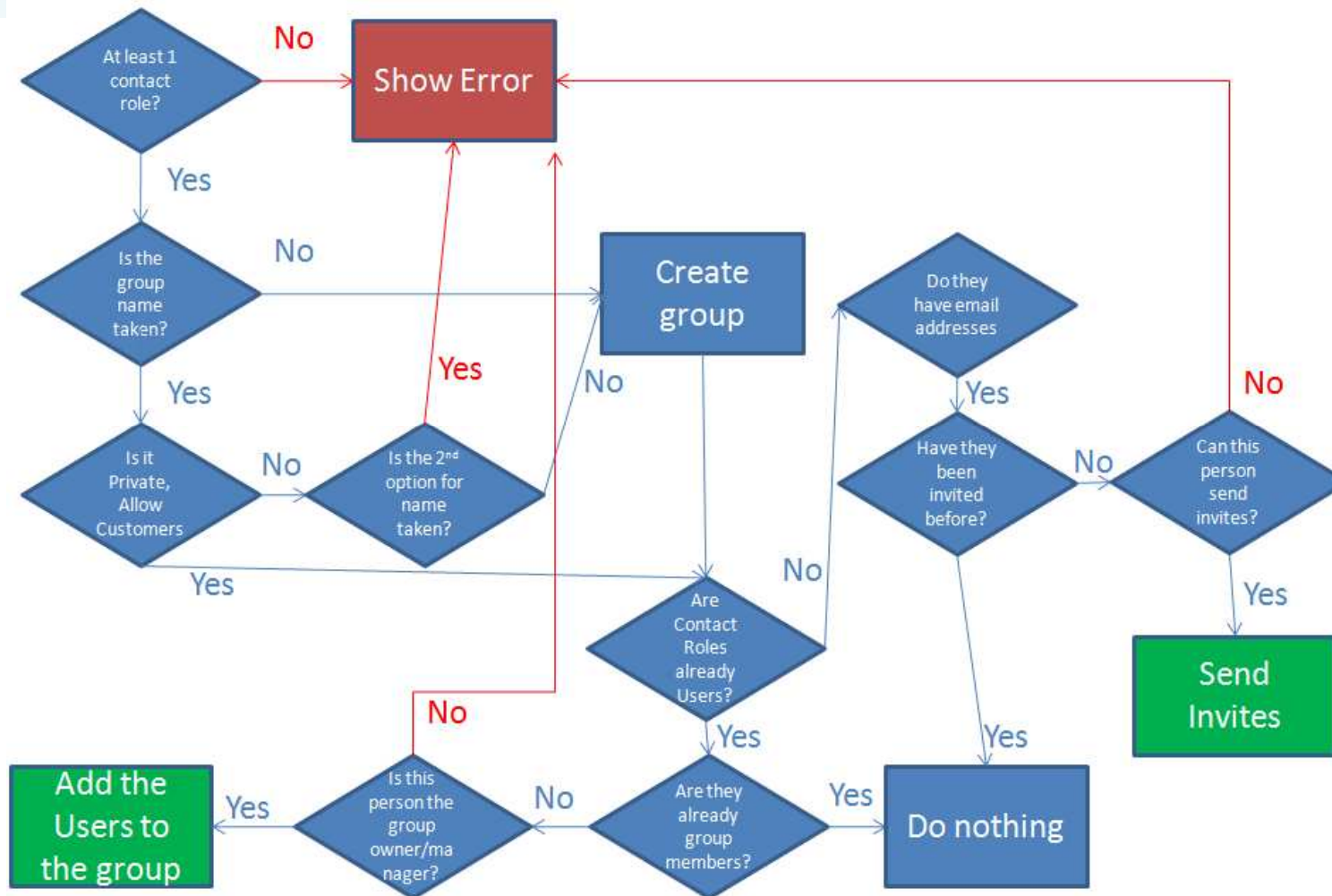
Any Gotchas?

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- The Account name is always used as the group name. If taken, a secondary group name of “<AccountName> Customer” is used such as:
 - Universal Telco Customer (With Customers)
- For the button to work, you must have Customer Invitations enabled in Chatter Settings and the button clicker must be able to send customer invites. Link to Settings:
 - <https://na1.salesforce.com/collaboration/collaborationSettings.apexp>
- If you click the button several times in a row, multiple invites will NOT be sent out
- If the group already exists, then the app tries to add new people to that group. If the clicker isn't an owner or manager of the group, then it will not work*
 - *Admins will be able to invite anyone and add sales teams even if the admin is not a group member, manager or owner
- All customer roles are invited – there is not a way to only invite some of them
- Companies get 500 Customer User licenses by default, so contact your sales rep if you need more

How exactly does the logic work?

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Questions?

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- Email jkucera@salesforce.com