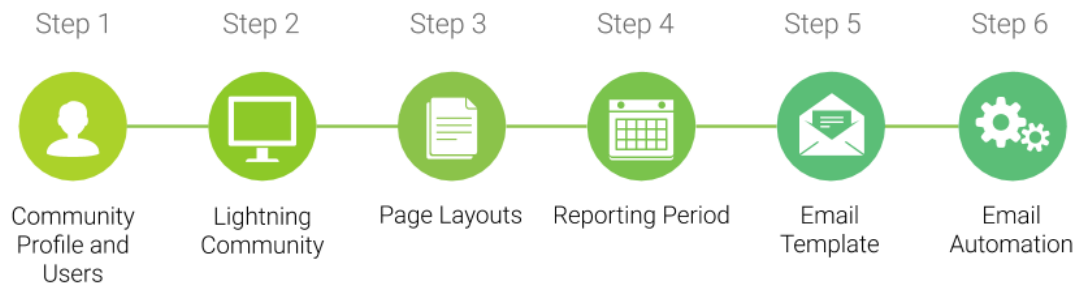


Grantee Reporting Setup Guide

April 2020

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Overview



The purpose of this guide is to provide information on how to set up your organization for grantee reporting using Amp Impact in a Salesforce Community. In the following six steps, this guide will walk through the configurations and set up necessary to begin using this feature.

1. Configure community profiles and users
2. Set up Lightning Community
3. Set up page layouts in Community Builder
4. Create a Grant Reporting Period
5. Configure email alerts for grantee access
6. Configure email automation to send to grantees

To get started, first create your community with the following profile and users on the next page.

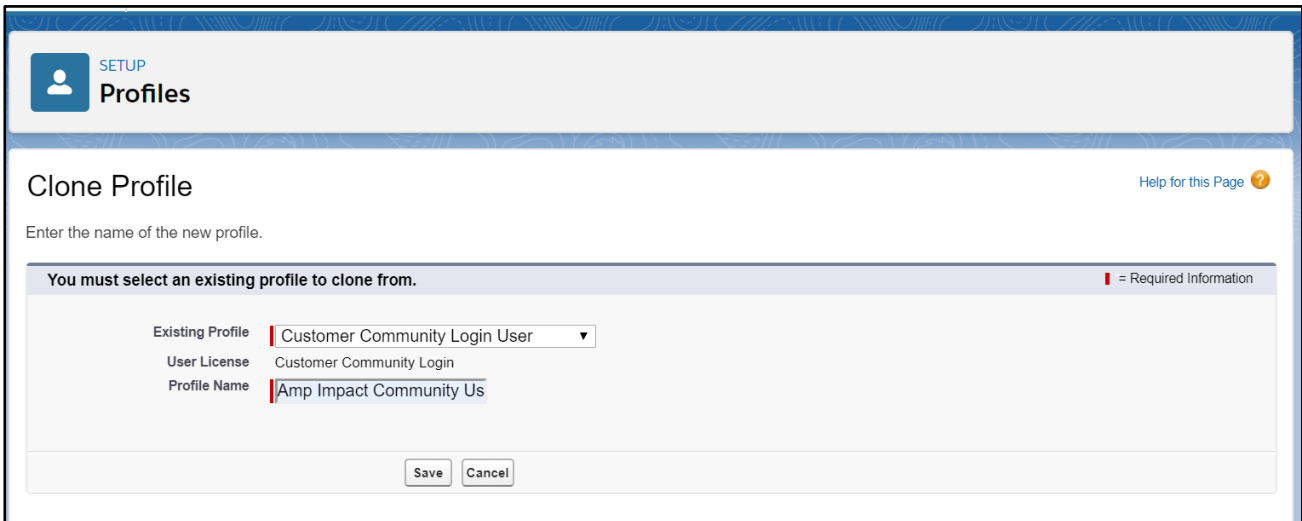
ⓘ Ensure that the Funder profile has proper permission set to review and modify grant reports. Please refer to *Amp Impact Installation Guide* for more information.

Set up a Community

Create Community Profile

ⓘ These steps are an example using the Customer Community Login User license. If you already have a community user profile that you plan to use in a community with Amp Impact, assign the permission set to those users. Otherwise, use the steps below as guidelines to a profile for community users and revise accordingly.

1. Go to Setup.
2. Type “Profiles” in Quick Find and click the result.
3. Click “New Profile”.
 - a. For the Existing Profile picklist, select “Customer Community Login User”.
 - b. The User License should display “Customer Community Login”.
 - c. For the Profile Name field, enter “Amp Impact Community User”.
 - d. See screenshot below.



SETUP
Profiles

Clone Profile

Help for this Page ?

Enter the name of the new profile.


You must select an existing profile to clone from. ■ = Required Information


Existing Profile	■ Customer Community Login User ▼
User License	Customer Community Login
Profile Name	■ Amp Impact Community Us

Save Cancel

4. Click “Save”.
5. Click “Edit”.


6. Scroll towards the bottom of the page to *Administrative Permissions*.
7. Mark the checkbox next to “API Enabled” as TRUE, and de-select all other checkboxes within *Administrative Permissions*, as per the screenshot below.

Administrative Permissions	
Add People to Direct Messages	<input type="checkbox"/>
Allow Inclusion of Code Snippets from UI	<input type="checkbox"/>
Apex REST Services	<input type="checkbox"/>
API Enabled	<input checked="" type="checkbox"/>
Can Approve Feed Post and Comment	<input type="checkbox"/>
Close Conversation Threads	<input type="checkbox"/>
Create and Customize List Views	<input type="checkbox"/>
Create and Own New Chatter Groups	<input type="checkbox"/>
Create custom Badge Definitions	<input type="checkbox"/>
Edit My Own Posts	<input type="checkbox"/>
Manage Analytics Private Assets	<input type="checkbox"/>
Manage Unlisted Groups	<input type="checkbox"/>
Moderate Communities Feeds	<input type="checkbox"/>
Moderate Communities Files	<input type="checkbox"/>
Moderate Community Users	<input type="checkbox"/>
Password Never Expires	<input type="checkbox"/>
Pin Posts in Feeds	<input type="checkbox"/>
Remove People from Direct Messages	<input type="checkbox"/> 
Select Files from Salesforce	<input type="checkbox"/>
Send announcement emails	<input type="checkbox"/>

 The Customer Community Login user license does not allow the ability to create reports.

8. Click “Save”.

Create Permission Set for Community Users

 A **permission set** is a collection of settings and permissions that would give community profile users access to various tools and functions. Note that permission sets extend users' functional access without changing their profiles. To learn more, visit the [Salesforce article on permission sets](#).

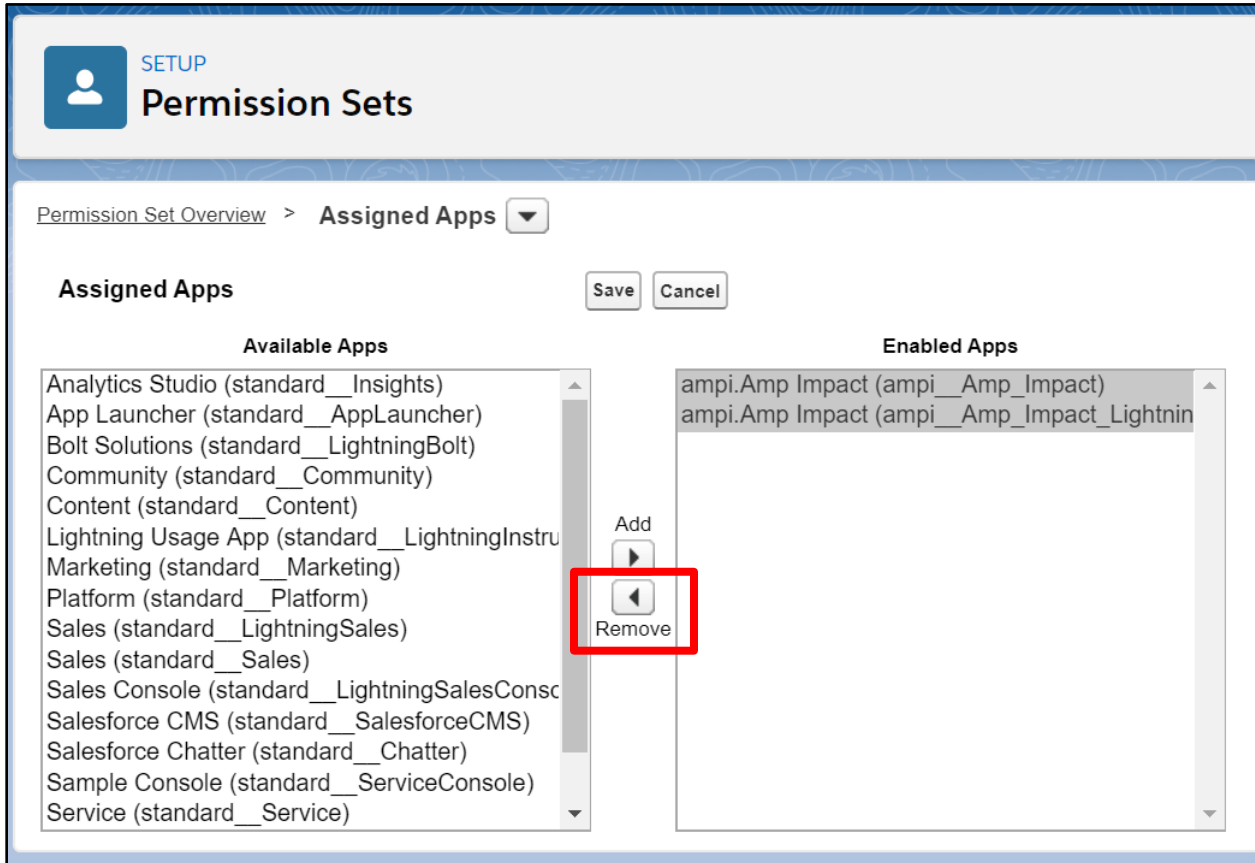
Setting up permission sets ensures that community users, i.e. grantees and funders, who will interact with this feature are given access to either read, create, edit, delete, view all, or modify all fields in an object.

Before system admins can create community users, ensure the following custom permission sets have been created.

ⓘ This permission set is an **example** to provide Community Users with access to all Project records and the Activity Tracking, Add Results, and Performance Graphs pages. Permissions should be customised to an organisation's use case.

1. Go to Setup.
2. Type "Permission Sets" in Quick Find and click the result.
3. Find "Amp Impact Admin" and click "Clone". Set the following:
 - a. Label: Amp Impact Community
 - b. API Name: Amp_Impact_Community
4. Click "Assigned Apps". In the page that loads, click "Edit".

5. Remove amp.Impact (ampi__Amp_Impact) and amp.Impact Lightning (ampi__Amp_Impact_Lightning) from the “Enabled Apps” list to the “Available Apps” list and click “Save”.
 - a. Assigned Apps are not allowed for some Community User licenses.
 - b. See screenshot below. After clicking Remove, there should be no Enabled Apps.



SETUP
Permission Sets

[Permission Set Overview](#) > **Assigned Apps** ▼

Assigned Apps Save Cancel

Available Apps	Enabled Apps
Analytics Studio (standard__Insights)	ampi.Amp Impact (ampi__Amp_Impact)
App Launcher (standard__AppLauncher)	ampi.Amp Impact (ampi__Amp_Impact_Lightning)
Bolt Solutions (standard__LightningBolt)	
Community (standard__Community)	
Content (standard__Content)	
Lightning Usage App (standard__LightningInstru)	
Marketing (standard__Marketing)	
Platform (standard__Platform)	
Sales (standard__LightningSales)	
Sales (standard__Sales)	
Sales Console (standard__LightningSalesConsc)	
Salesforce CMS (standard__SalesforceCMS)	
Salesforce Chatter (standard__Chatter)	
Sample Console (standard__ServiceConsole)	
Service (standard__Service)	

Buttons: Add, Remove (highlighted in red)

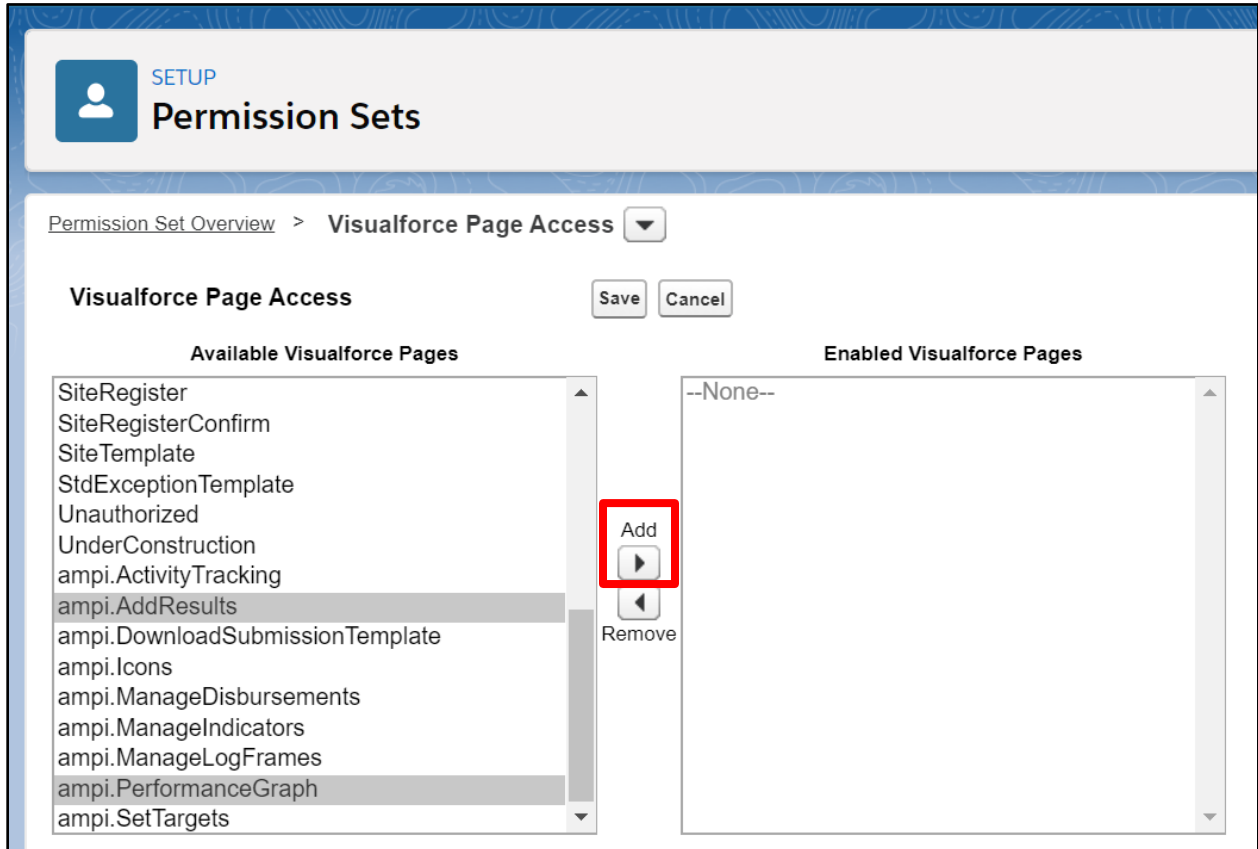
6. Open “Object Settings”.
7. For each object in the table below, set the following permissions by clicking each object and then clicking “Edit”.

Object Permissions

Object	Read	Create	Edit	Delete	View All	Modify All
Activities	X	X	X	X		
Budgets	X	X	X	X		
Disaggregated Indicators	No access					
Disaggregated Project Indicators	X	X	X		X	
Disaggregation Groups	X	X	X		X	
Disaggregation Values	X	X	X	X	X	X
Disbursements	No access					
Financials	X	X	X	X		
Geographic Areas	X					
IATI Policies	No access					
IATI Sectors	No access					
Implementation Plans	X	X	X			
Indicators	X	X	X		X	
Indicator Thematic Areas	No access					
Objectives	X					
Organization Roles	X					
Project Geographic Areas	No access					
Project IATI Policies	No access					

Project IATI Sectors	No access					
Project Indicator Geographic Areas	X	X	X		X	
Project Indicator Objectives	No access					
Object (continued)	Read	Create	Edit	Delete	View All	Modify All
Project Indicator Reporting Periods	X	X	X		X	
Project Indicators	X	X	X		X	
Project Indicator Thematic Areas	No access					
Project Objectives	X					
Project Roles	X					
Projects	X	X			X	
Project Thematic Areas	No access					
Questions	No access					
Reporting Periods	X	X	X		X	
Results	X	X	X	X	X	X
Sections	No access					
Submissions	No access					
Thematic Areas	X					
Visualforce Updates	X	X				

8. Navigate to Visualforce Page Access. Add “ampi.AddResults” and “ampi.PerformanceGraphs” to the Enabled Visualforce Pages list, as shown in the screenshot below. Click “Save”.

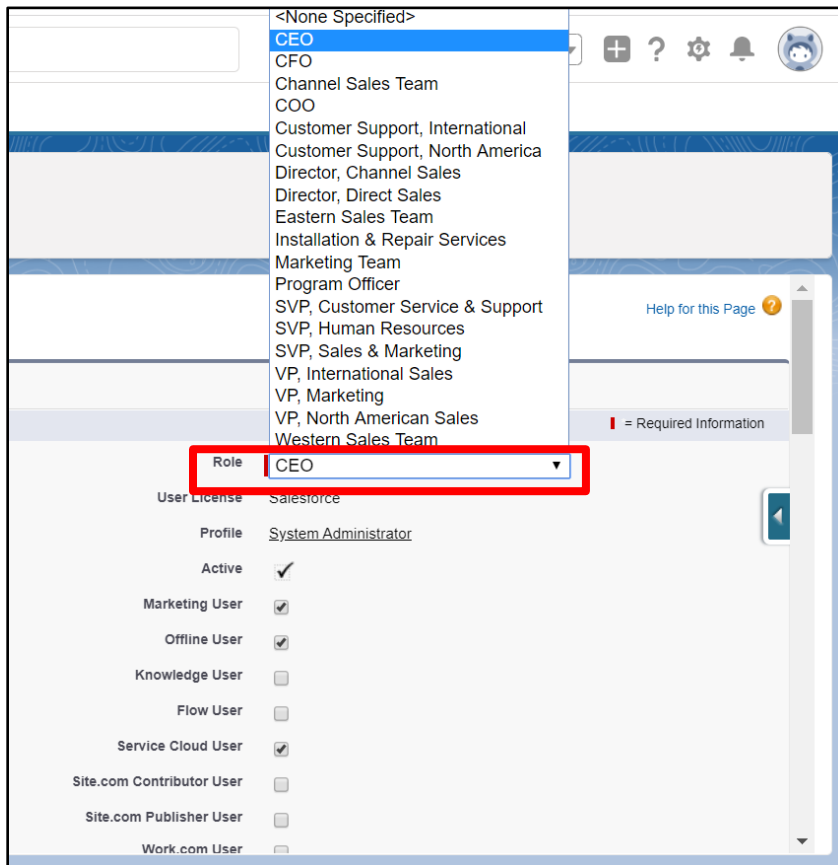


The screenshot displays the Salesforce 'Permission Sets' configuration page. The breadcrumb trail is 'Permission Set Overview > Visualforce Page Access'. The page title is 'Visualforce Page Access' with 'Save' and 'Cancel' buttons. It features two columns: 'Available Visualforce Pages' and 'Enabled Visualforce Pages'. The 'Available' list includes 'SiteRegister', 'SiteRegisterConfirm', 'SiteTemplate', 'StdExceptionTemplate', 'Unauthorized', 'UnderConstruction', 'ampi.ActivityTracking', 'ampi.AddResults', 'ampi.DownloadSubmissionTemplate', 'ampi.Icons', 'ampi.ManageDisbursements', 'ampi.ManageIndicators', 'ampi.ManageLogFrames', 'ampi.PerformanceGraph', and 'ampi.SetTargets'. The 'Enabled' list is currently empty, showing '--None--'. A red box highlights the 'Add' button (a right-pointing arrow) between the two lists, with a 'Remove' button (a left-pointing arrow) below it.

Create Community Users

ⓘ The Contact record must have a parent Account in order to be able to follow the next steps listed below. Contacts that are not linked to an Account are always private, and would not be visible to anyone except for the Contact owner and system admin.

1. Navigate to Setup.
2. In Quick Find, type “Users”.
3. Identify the user with the System Administrator profile, and click *Edit*.
4. In the Role dropdown, select the System Administrator’s role in the organization, as shown below.

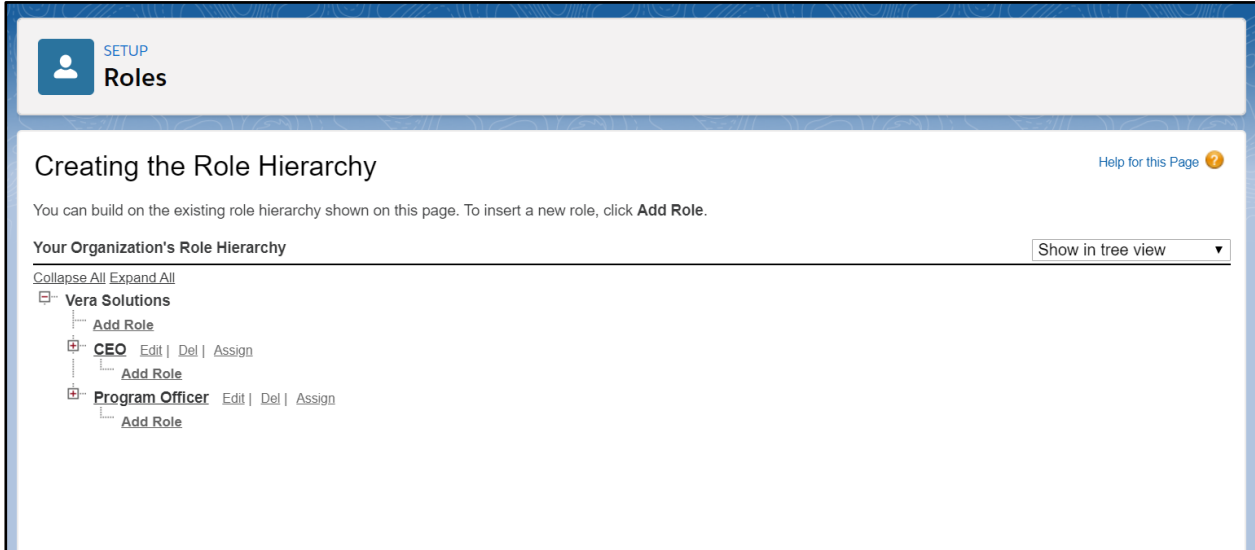


The screenshot shows the 'Role' dropdown menu in the Salesforce user edit form. The dropdown is open, displaying a list of roles. The 'CEO' role is selected and highlighted in blue. Below the dropdown, the 'Role' field is highlighted with a red box, showing 'CEO' as the selected value. Other roles in the list include CFO, Channel Sales Team, COO, Customer Support, International, Customer Support, North America, Director, Channel Sales, Director, Direct Sales, Eastern Sales Team, Installation & Repair Services, Marketing Team, Program Officer, SVP, Customer Service & Support, SVP, Human Resources, SVP, Sales & Marketing, VP, International Sales, VP, Marketing, VP, North American Sales, and Western Sales Team.

a. An account owner must be

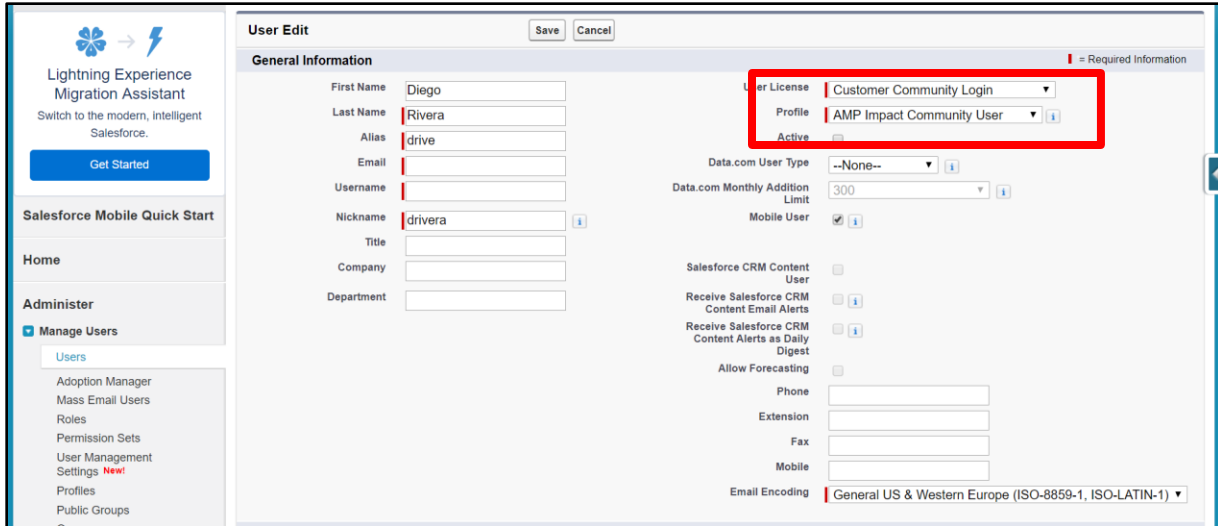
associated with a role to enable portal users or transfer portal users to his or her account.

- b. The actual role itself may be customized and will vary from organization.
- c. To set up unique Roles, type “Roles” in Quick Find. See screenshot below.
 - i. Click Set up New Role.
 - ii. Click Add Role according to the role hierarchy of the organization.



i For **sandbox environments only**, please be sure to click “Enable as Partner” on the Account record related to the Contacts. To do this, click on the dropdown located at the top right of the Account record.

5. Open a Contact record detail.
 - a. Ensure the Contact is connected to an Account.
6. Enable the Contact as a Customer user by:
 - a. (Lightning) Click “Enable Customer User” button.
 - b. (Classic) Click “Manage External User” at the top of the record. Select “Enable Customer User” from the dropdown.
 - c. In the User record page, select User License as “Customer Community Login” and Profile as “Amp Impact Community User” (or the Profile created in the earlier section on [customising Community Profiles](#)) as shown in the screenshot below.
 - d. Fill out Email, username, and nickname, as these are mandatory fields.



User Edit [Save] [Cancel] Required Information

General Information

First Name: Diego
 Last Name: Rivera
 Alias: drive
 Email:
 Username:
 Nickname: drivera
 Title:
 Company:
 Department:

User License: Customer Community Login
 Profile: AMP Impact Community User
 Active:

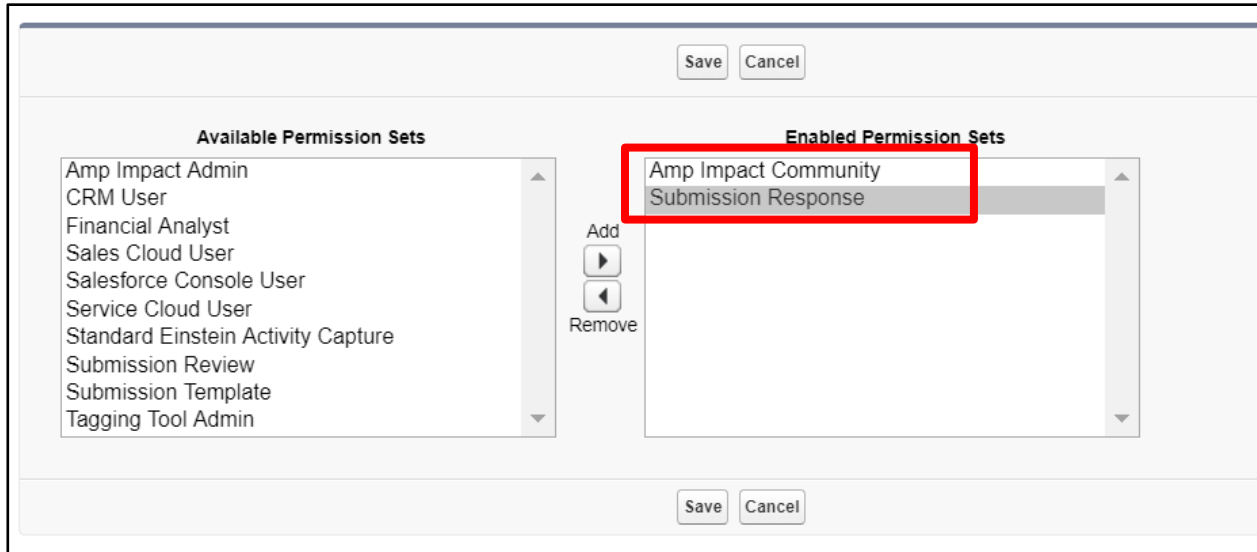
Data.com User Type: --None--
 Data.com Monthly Addition Limit: 300
 Mobile User:
 Salesforce CRM Content User:
 Receive Salesforce CRM Content Email Alerts:
 Receive Salesforce CRM Content Alerts as Daily Digest:
 Allow Forecasting:
 Phone:
 Extension:
 Fax:
 Mobile:
 Email Encoding: General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

7. Click "Save".
 - a. The user will receive an auto-generated email to reset their password.

8. Scroll down the User record page to the first related list (Permission Set Assignments). Click "Edit Assignments". See screenshot below.

Permission Set Assignments		Edit Assignments	Permission Set Assignments Help
Action	Permission Set Label	Edit Assignments	
Del	AMP Impact Community	7/12/2017	

9. Add “**Amp Impact Community**” and “**Submission Response**” in the multi-select picklist, as shown below.



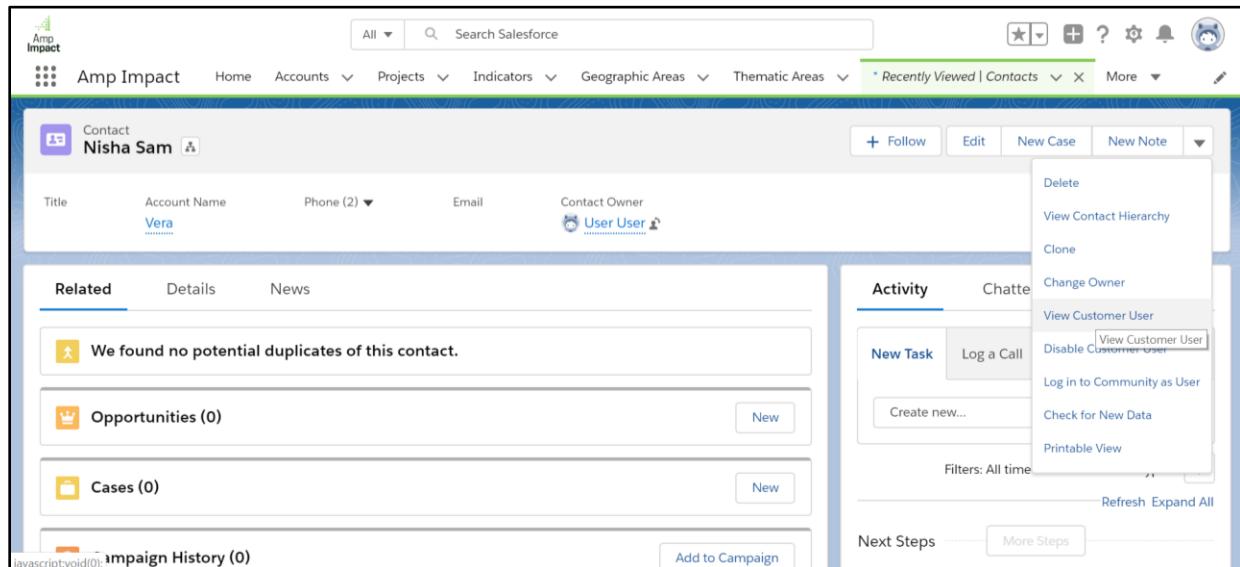
10. Click “Save”.

Assign Amp Impact Community User Permission Set to Grantee

After [creating permission sets for community users](#), the admin may then assign the permission set to grantee users.

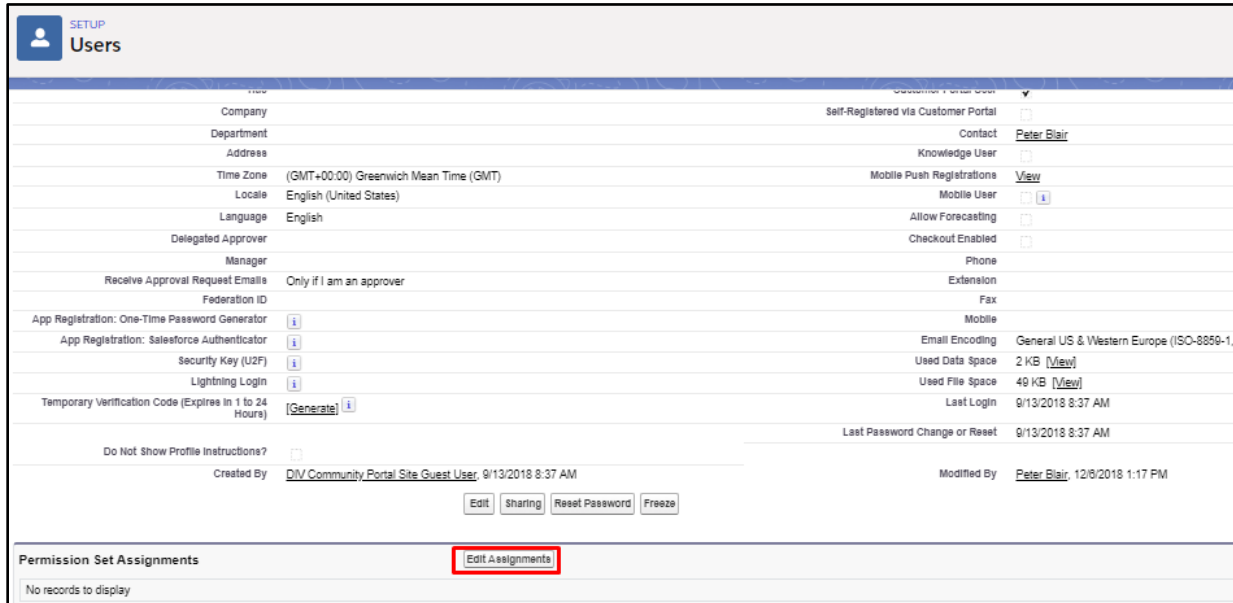
① If this step is not completed, the Grantee will see an error message in the Community and be unable to report on the Grant.

1. Navigate to the Contacts object and select a grantee name to view the record.
2. On the grantee record, click on the “View Customer User” button on the top-right corner. See screenshot below.



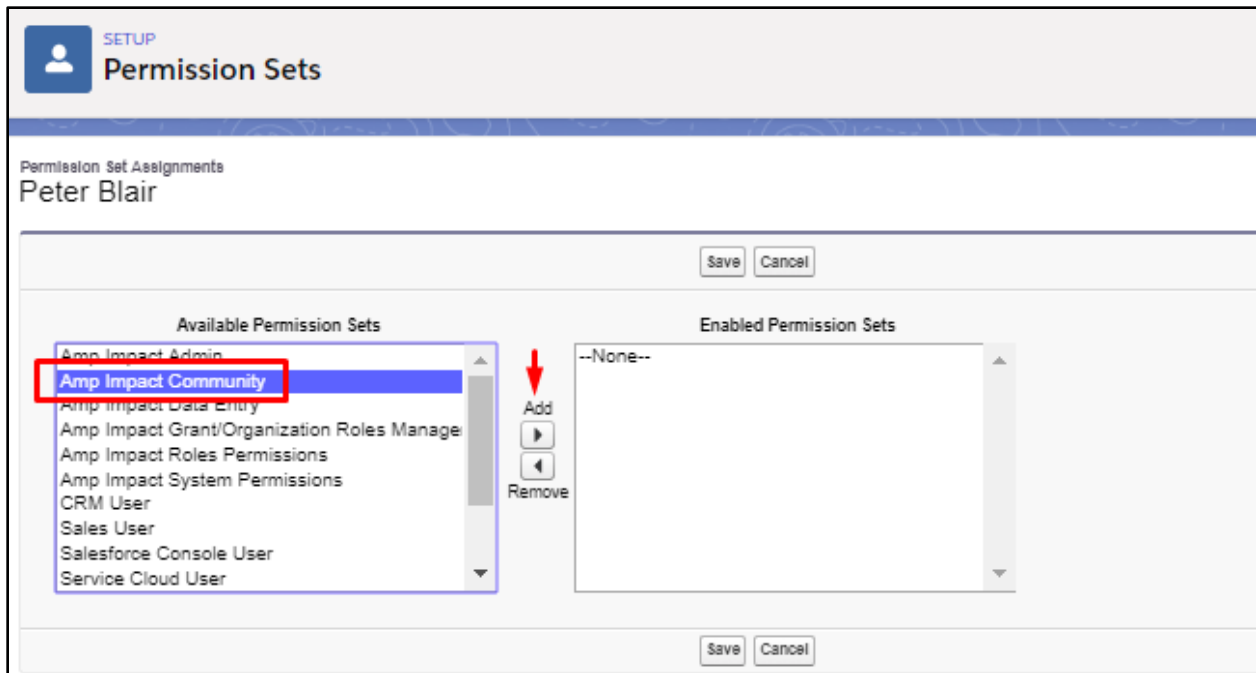
The screenshot displays the Salesforce interface for a contact record. The contact name is Nisha Sam, and the account name is Vera. The contact owner is User User. The interface shows a navigation bar at the top with various tabs and a search bar. The main content area is divided into sections: 'Related' (with a message about no potential duplicates), 'Opportunities (0)', 'Cases (0)', and 'Campaign History (0)'. On the right side, there is an 'Activity' section with a 'New Task' button and a 'Log a Call' button. A dropdown menu is open over the 'View Customer User' button, showing options like 'Delete', 'View Contact Hierarchy', 'Clone', 'Change Owner', 'View Customer User', 'Disable Customer User', 'Log in to Community as User', 'Check for New Data', and 'Printable View'.

3. Scroll down to the Permission Set Assignments section, and click “Edit Assignments”. See screenshot below.



The screenshot shows the 'Users' setup page in Salesforce. The page is divided into two main sections: 'Profile' and 'Permission Set Assignments'. The 'Profile' section contains various user settings such as 'Company', 'Department', 'Address', 'Time Zone', 'Locale', 'Language', 'Delegated Approver', 'Manager', 'Receive Approval Request Emails', 'Federation ID', 'App Registration: One-Time Password Generator', 'App Registration: Salesforce Authenticator', 'Security Key (U2F)', 'Lightning Login', 'Temporary Verification Code', 'Do Not Show Profile Instructions?', 'Created By', and 'Modified By'. The 'Permission Set Assignments' section at the bottom shows 'No records to display' and a red box highlights the 'Edit Assignments' button.

4. Select the “**Amp Impact Community**” Permission Set from the table on the left-hand side, and use the “Add” arrow in the center to move it to the Assigned table on the right. See screenshot below.

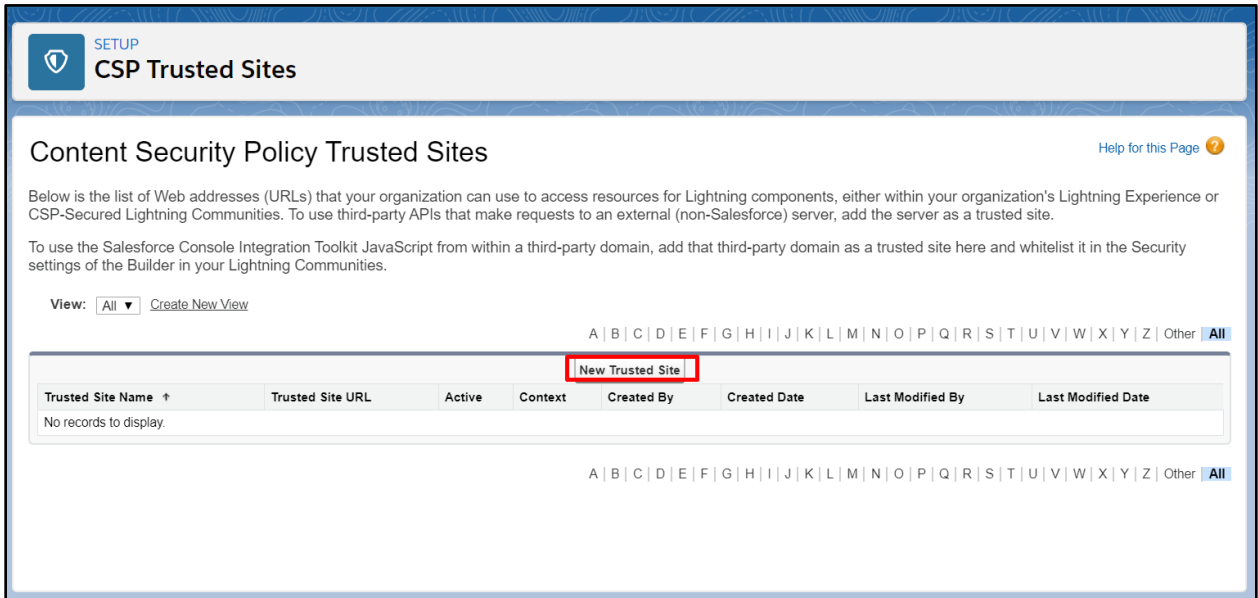


5. Click “Save” to enable this change.

Enable Performance Graphs Download

To allow Community users to download and export performance graphs successfully, an additional step is required for setup.

1. Navigate to Setup.
2. Using the Quick Find bar, search for “CSP Trusted Sites”.
3. Click “New Trusted Site” as shown below.



SETUP
CSP Trusted Sites

Content Security Policy Trusted Sites [Help for this Page](#)

Below is the list of Web addresses (URLs) that your organization can use to access resources for Lightning components, either within your organization's Lightning Experience or CSP-Secured Lightning Communities. To use third-party APIs that make requests to an external (non-Salesforce) server, add the server as a trusted site.

To use the Salesforce Console Integration Toolkit JavaScript from within a third-party domain, add that third-party domain as a trusted site here and whitelist it in the Security settings of the Builder in your Lightning Communities.

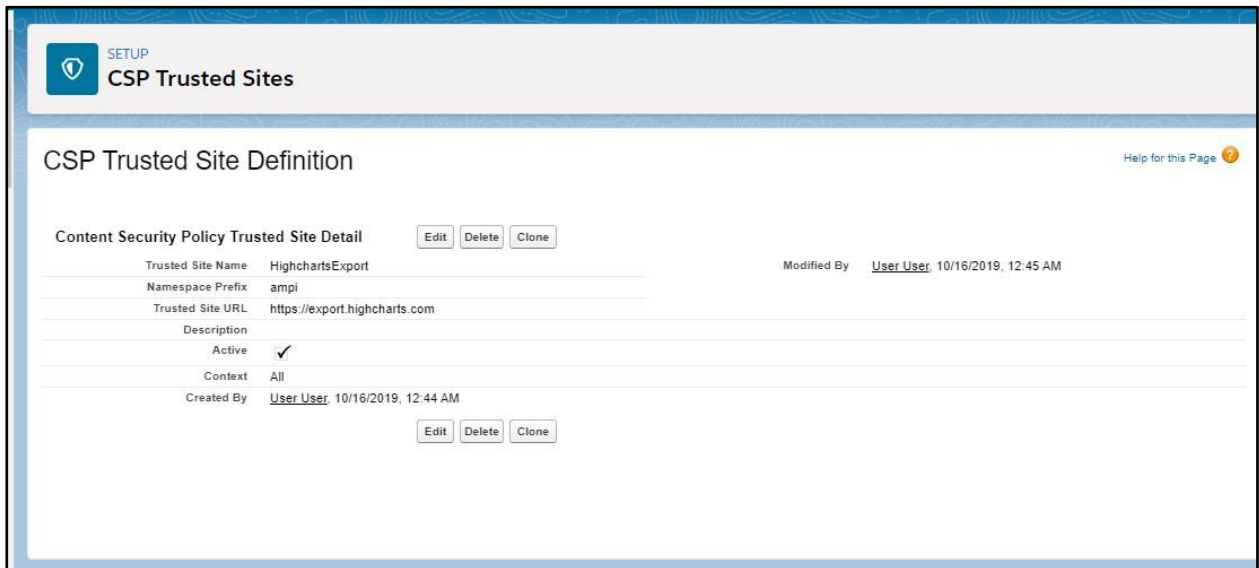
View: **All** [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Trusted Site Name ↑	Trusted Site URL	Active	Context	Created By	Created Date	Last Modified By	Last Modified Date
No records to display.							

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

4. On the next screen, ensure the following fields are populated:
 - a. Trusted Site Name: HighchartsExport
 - b. Trusted Site URL: https://export.highcharts.com
 - c. Context: All
5. Click Save, record should look similar to the screenshot below.



SETUP
CSP Trusted Sites

CSP Trusted Site Definition [Help for this Page](#)

Content Security Policy Trusted Site Detail [Edit](#) [Delete](#) [Clone](#)

Trusted Site Name	HighchartsExport	Modified By	User User, 10/16/2019, 12:45 AM
Namespace Prefix	ampi		
Trusted Site URL	https://export.highcharts.com		
Description			
Active	<input checked="" type="checkbox"/>		
Context	All		
Created By	User User, 10/16/2019, 12:44 AM		

[Edit](#) [Delete](#) [Clone](#)

Set up Lightning Community

After setting up Community profiles, users and permission sets, admins can now set up the Lightning Community using lightning components. After configuring the Community, funders will be able to set up reporting periods and invite grantees to report, which they can later review. Grantees will be able to fill out reports including adding results, visualizing targets vs. results, narrative reporting and financials. To learn more, view [Grantee Reporting User Guide](#).

In Setup

1. Open Setup.
2. If communities are not yet enabled, enable Communities.
 - a. Type “Communities Settings” in Quick Find and click the result.
 - b. Select “Enable Communities”.
3. Type “All Communities” in Quick Find and click the result.
4. Click the “New Community” button.

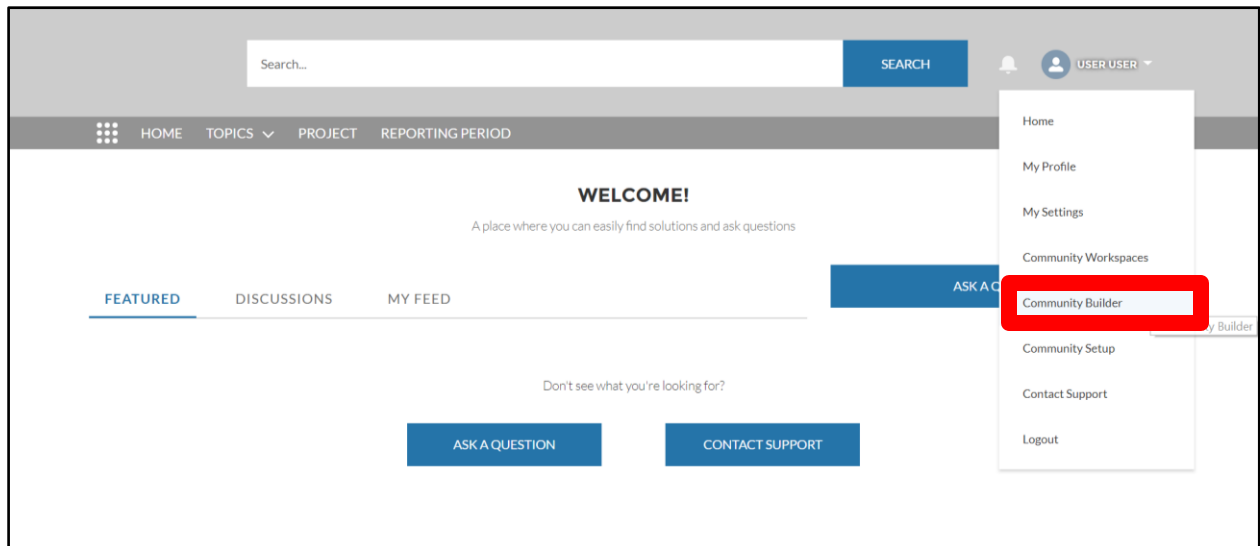
In Lightning Bolt Page

1. Select “Customer Service”.
2. Click “Get Started”.
3. Name your community and (optional) set a URL. Click “Create”. You will be taken to the Community Workspaces.

In Community Builder

Set Up Reporting Periods

1. Click on User profile icon on the top-right corner. From the dropdown, select “Community Builder”.



2. Click "Navigation Menu" button. Another popup will appear.
3. Click "+ Add Menu Item" button.

4. Name Menu Item as “Reporting Period”, select Type as “Salesforce Object”, and select Object Type as “Reporting Period”. You can leave the Default List View at “Default”.

Navigation Menu

Menu Structure [+ Add Menu Item](#)

Home 🏠

☰ Support ✕

☰ Reporting Period ✕

Menu Item

* Name
Reporting Period

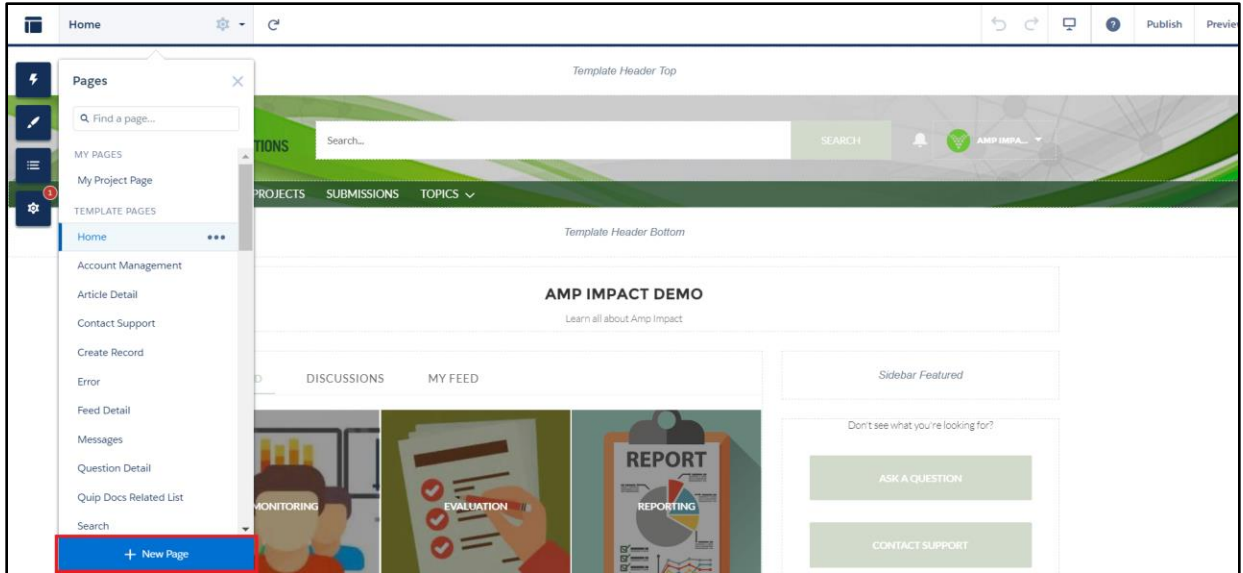
* Type
Salesforce Object ▼

* Object Type
Reporting Period ▼

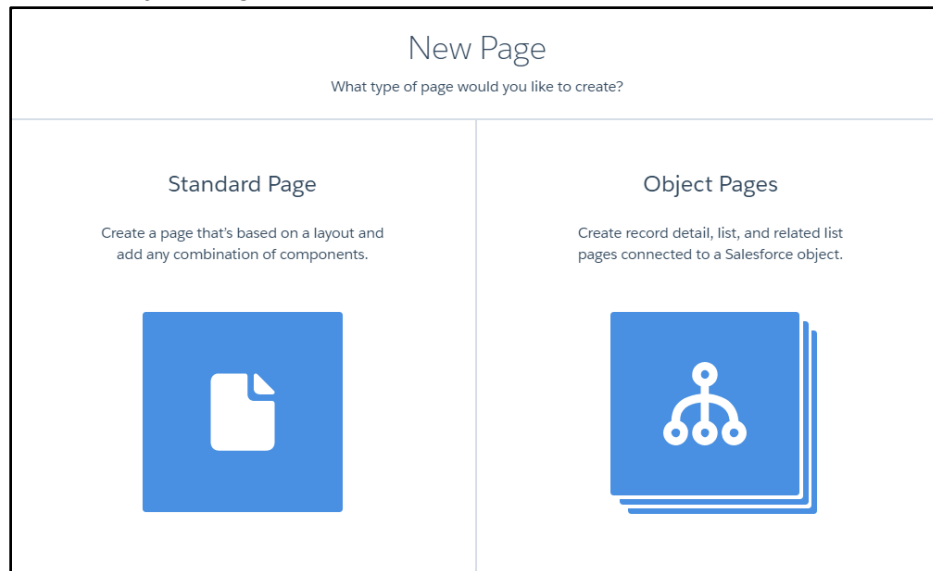
* Default List View
Default ▼

Publicly available

5. Click “Save Menu”.
6. Create a Reporting Period record page in the Community Builder.
 - a. Click the dropdown in the top left corner.
 - b. Scroll to the bottom of the Picklist and click the “+ New Page” button. A pop-up will appear.



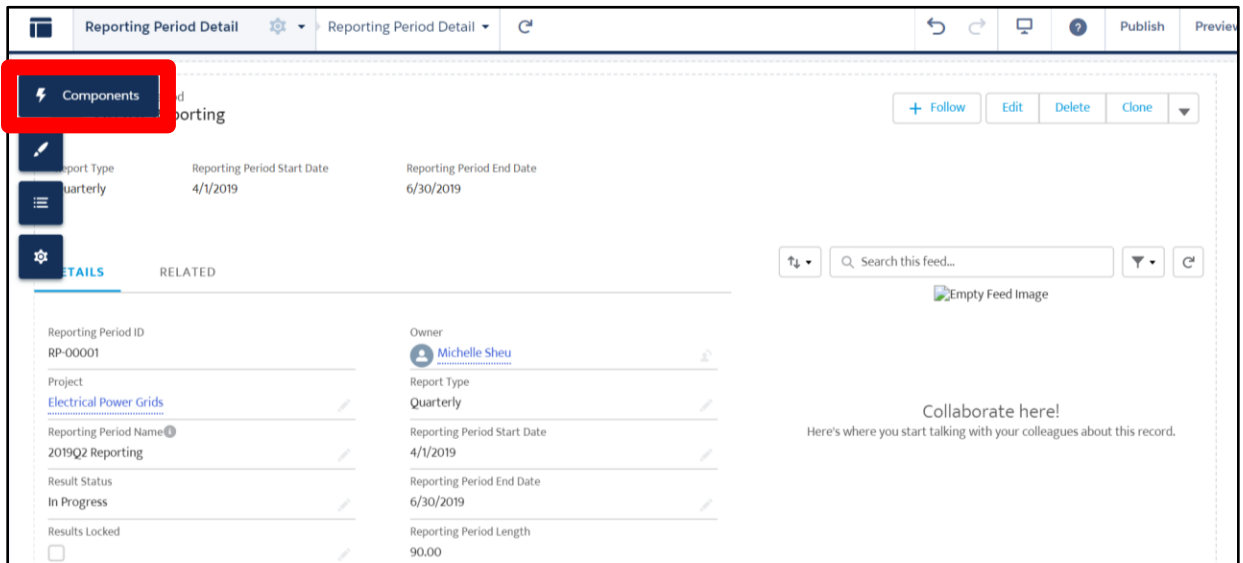
c. Select “Object Pages”



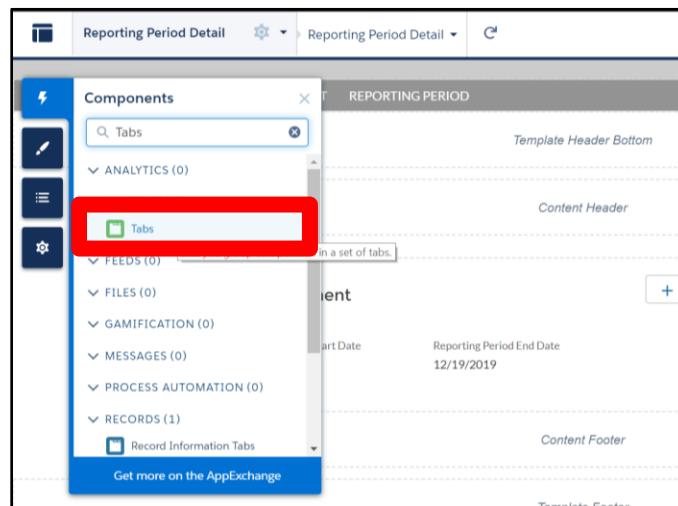
d. Find and select “Reporting Period” in the list of Objects.

e. Click “Create”. You will be navigated to the new Reporting Period Detail Page.

- On the Reporting Period detail page, click on “Components” icon on the left hand navigation panel, as shown in the screenshot below.



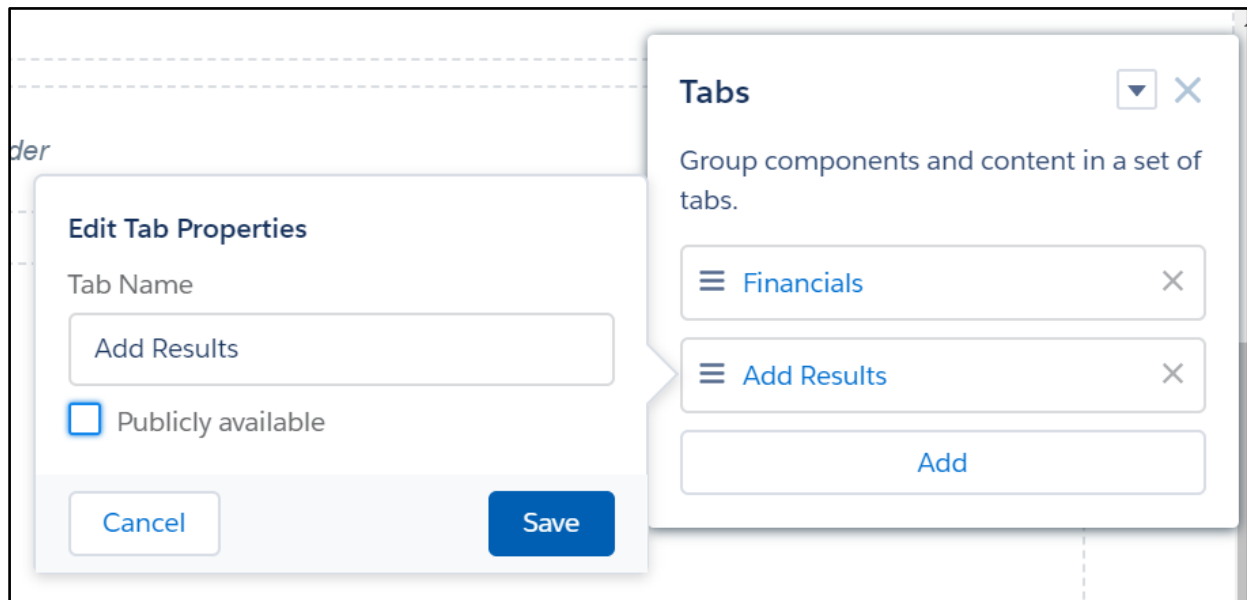
- Search for “Tabs” component. Drag and drop it into between the Record Banner and Content Footer. See below for screenshot.



- If desired, click “Preview” to review changes before clicking “Publish” to save.

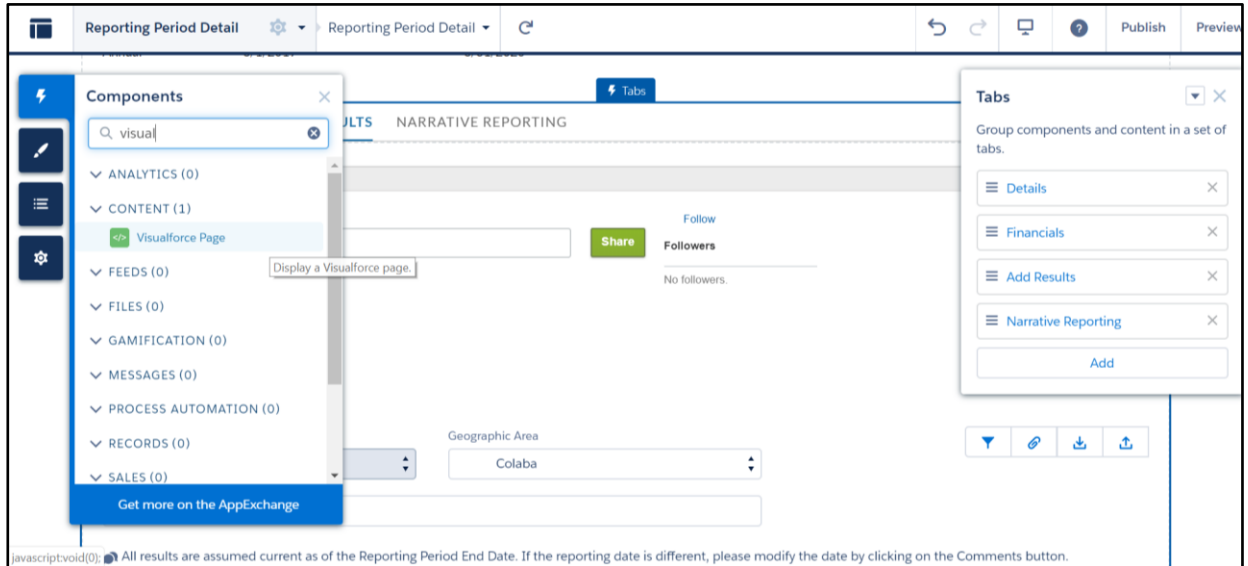
Set Up Add Results

1. Navigate to Community Builder on Reporting Period object.
2. Click on the Tabs editor in the right-hand side and add a new tab.
3. Click on the new tab and rename it to “Add Results”, as shown in the screenshot below.



4. Click “Save.”

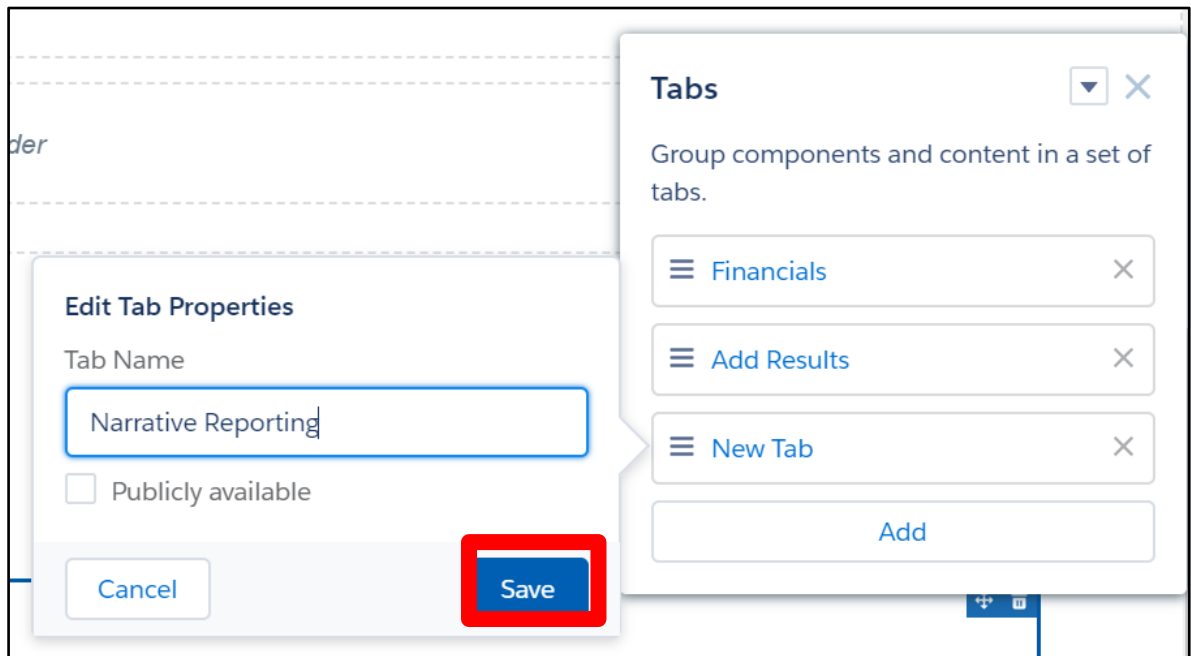
5. Add a Visualforce Page component to the Add Results tab.
 - a. Find the Visualforce Page component in the Custom Components section of the list, see the screenshot below.



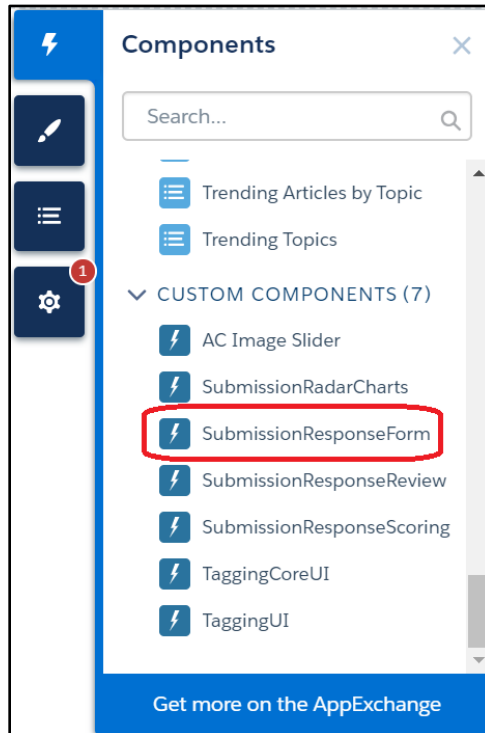
- b. Drag and drop the Visualforce Page component above the footer.
 - c. A pop-up will display on the right-hand side. Select AddResults from the dropdown for the Visualforce Page Name. Leave all other fields same.
6. If desired, click “Preview” to review changes before clicking “Publish” to save.

Set Up Narrative Reporting

1. Ensure steps from [Set Up Add Results](#) have been completed.
2. Click on the Tabs editor in the right-hand side and add a new tab.
3. Click on the new tab and rename it to “Narrative Reporting”.
4. Click “Save” as shown below.

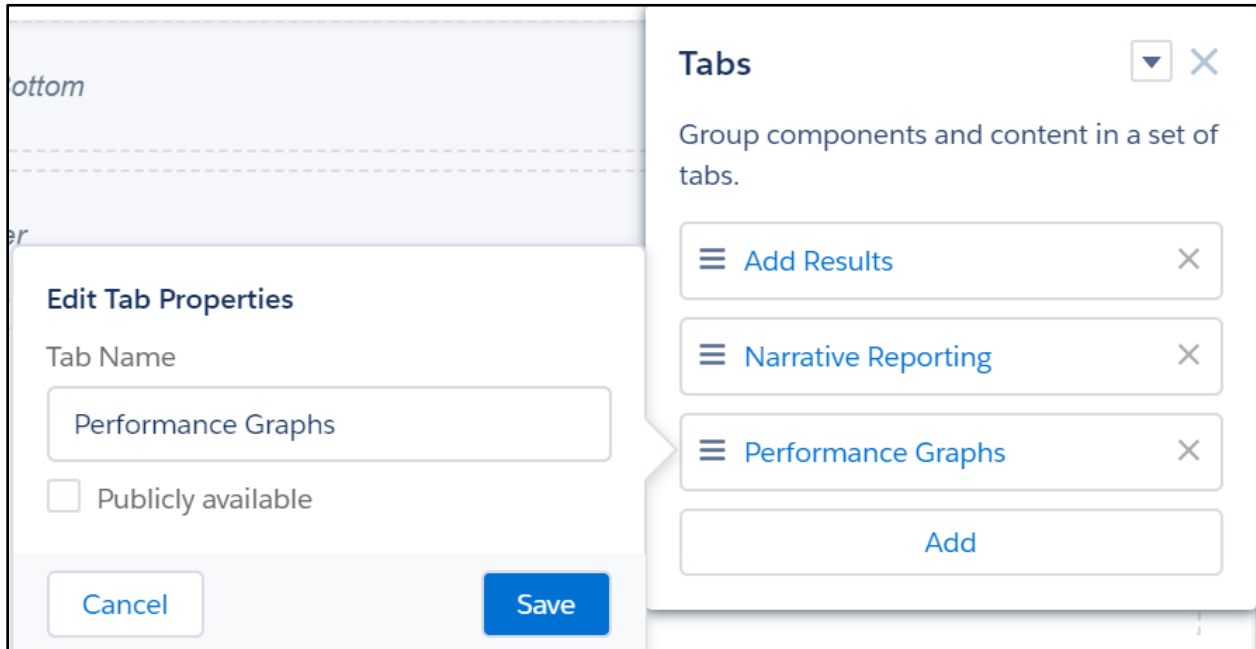


5. Add the SubmissionResponseForm component to the Narrative Reporting tab.
 - a. Find the SubmissionResponseForm component in the Custom Components section of the list.
 - b. Drag and drop the SubmissionResponseForm below the Record Detail component.
6. If desired, click “Preview” to review changes before clicking “Publish” to save.

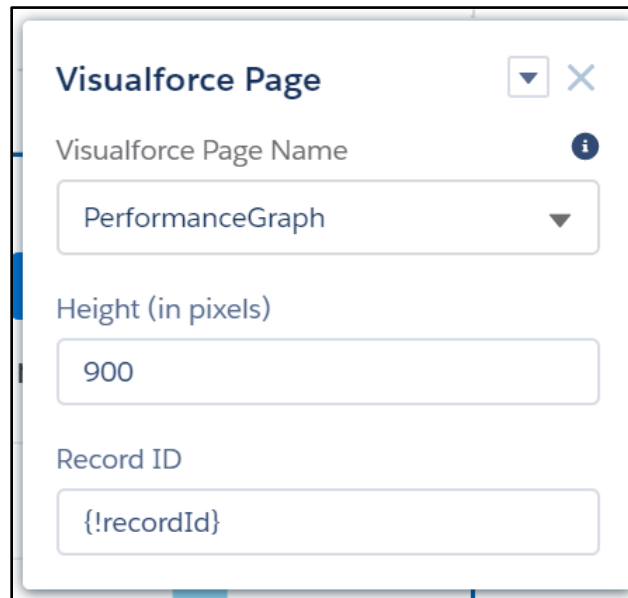


Set Up Performance Graphs

1. Ensure steps from [Set Up Add Results](#) and [Set Up Narrative Reporting](#) have been completed.
2. Open up the tab editor, and click Add. Edit the tab name to “Performance Graphs”.
3. Click “Save” as shown below.



4. Add a Visualforce Page component to the Performance Graphs tab.
 - d. Find the Visualforce Page component in the Custom Components section of the list.
 - e. Drag and drop the Visualforce Page component above the footer.
 - f. A pop-up will display on the right-hand side. Select Performance Graphs from the dropdown for the Visualforce Page Name. Leave all other fields same.



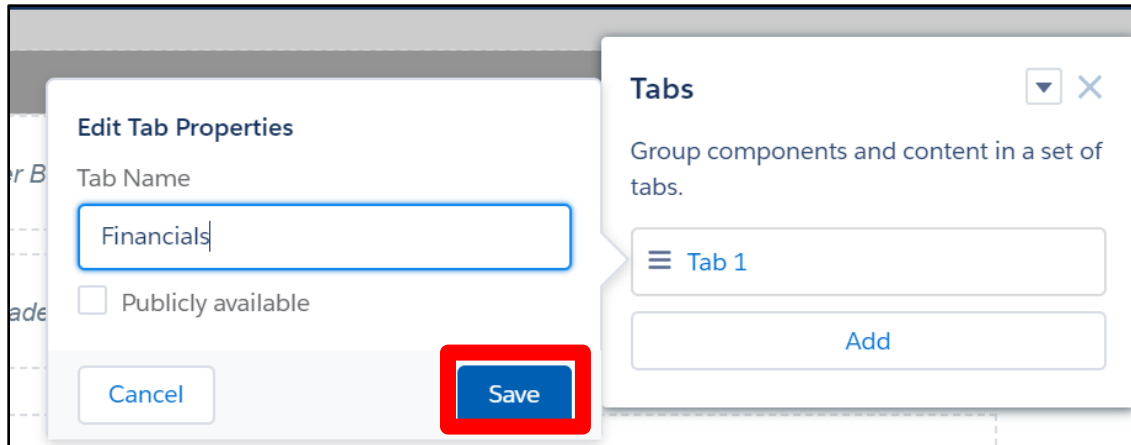
The image shows a configuration window for a Visualforce Page. The window has a title bar with "Visualforce Page" and a close button. Below the title bar, there are three fields:

- Visualforce Page Name:** A dropdown menu with "PerformanceGraph" selected.
- Height (in pixels):** A text input field containing "900".
- Record ID:** A text input field containing "{!recordId}".

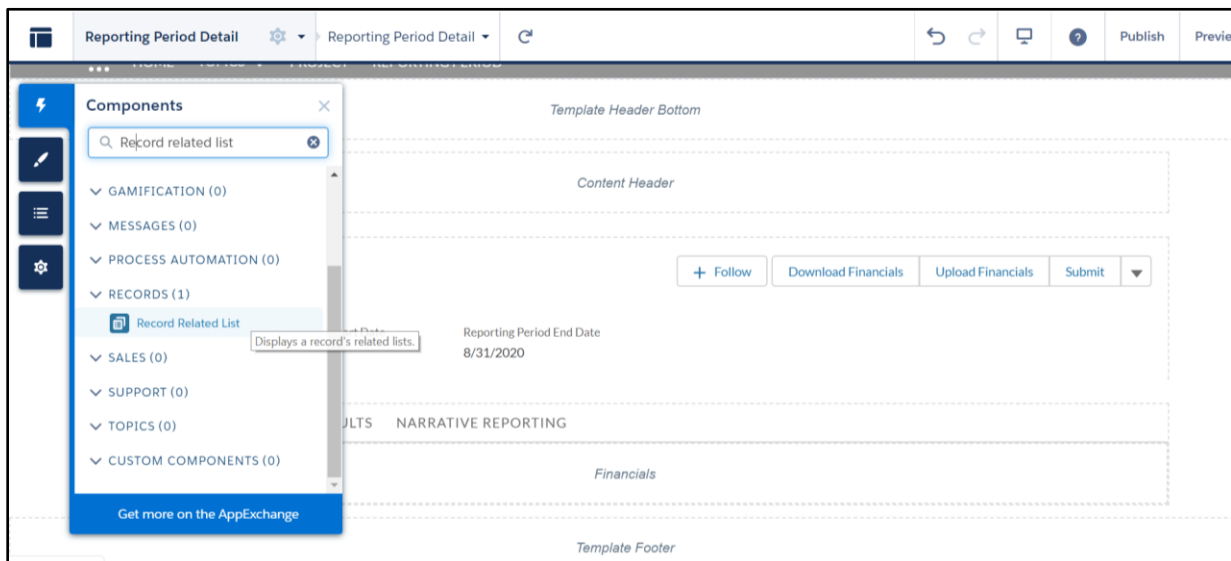
5. If desired, click "Preview" to review changes before clicking "Publish" to save.

Set Up Financial Reports

1. Navigate to Community Builder on Reporting Period object.
2. Click on the Tabs editor in the right-hand side and edit the name to “Financials”.
3. Click “Save” as shown below.



4. Add the 'Record Related List' component to the Financials tab.
 - a. Search for the Record Related List component in the Components section of the list.



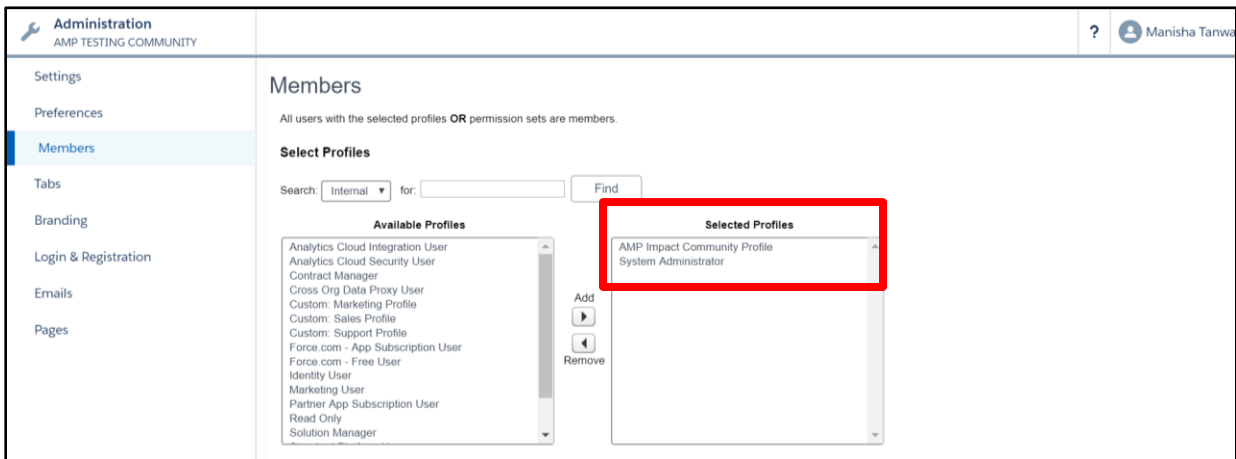
- b. Drag and drop the Record Related List component where it says “Financials” in italics, right above the template footer.

5. If desired, click “Preview” to review changes before clicking “Publish” to save.

Activate Community

After successfully setting up the community with users, be sure to activate the community and ensure the right profiles are granted access.

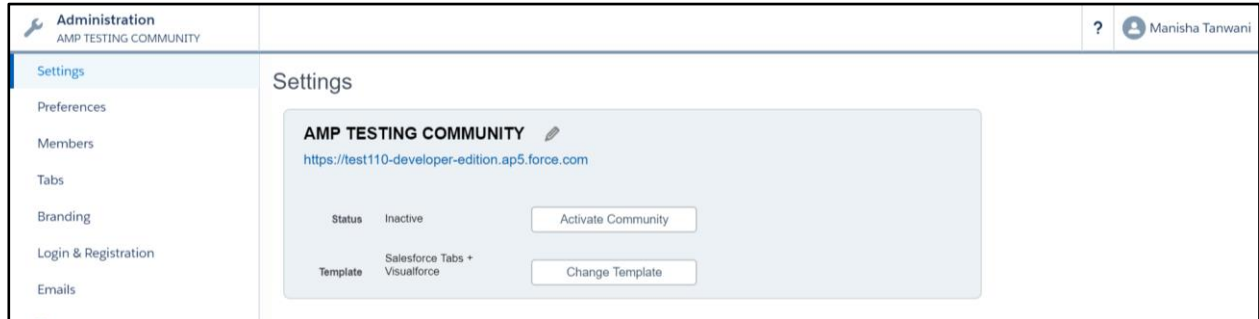
1. Navigate to Community Workspace by clicking on the profile
2. In “Administration”, click “Members”.
3. Add the “Amp Impact Community Profile” to the multi-select picklist.



The screenshot shows the 'Administration' page for the 'AMP TESTING COMMUNITY'. The 'Members' section is active, displaying a search bar and two lists of profiles. The 'Available Profiles' list includes various roles like 'Analytics Cloud Integration User' and 'Contract Manager'. The 'Selected Profiles' list, highlighted with a red box, contains 'AMP Impact Community Profile' and 'System Administrator'. The interface also shows a sidebar on the left with navigation options like 'Settings', 'Preferences', and 'Members', and a user profile 'Manisha Tanwa' in the top right corner.

4. Click “Save”. See screenshot below.
5. Click the icon in the top left corner to bring down the sidebar.

6. Click “Settings”, and click “Activate Community”. See screenshot below.

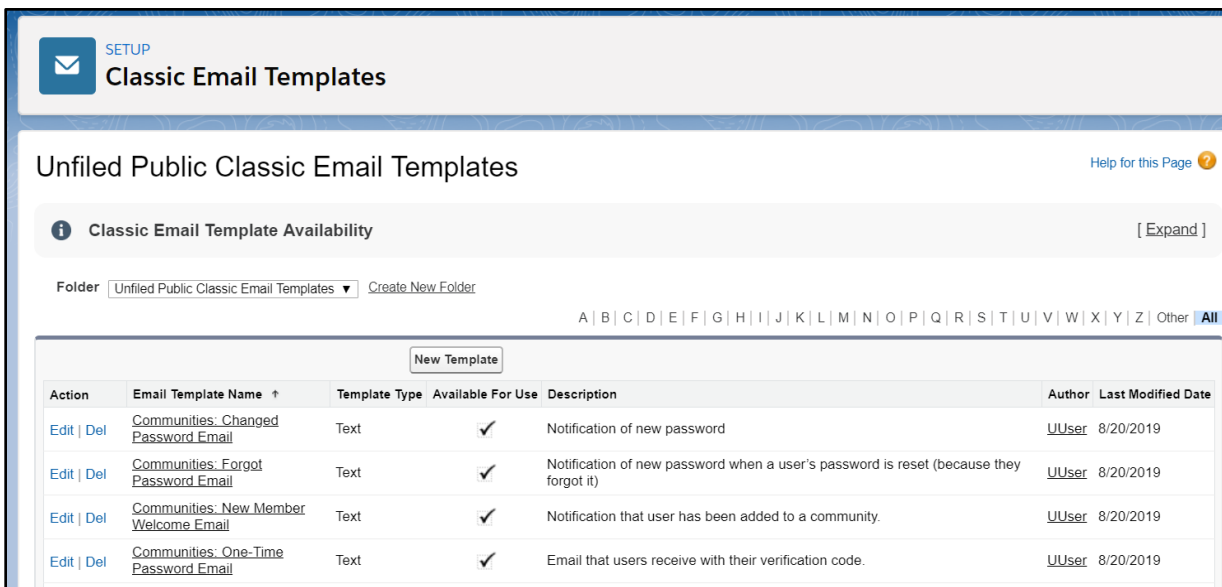


Set up Emails for Grantees to Access Reports

System admins can configure an email alert to send to grantees the link of a grant report according to the start and end dates.

Create an Email Template

1. Navigate to Setup, and using the Quick Find search for Classic Email Templates.



SETUP
Classic Email Templates

Unfiled Public Classic Email Templates [Help for this Page](#)

i Classic Email Template Availability [\[Expand \]](#)

Folder: Unfiled Public Classic Email Templates [Create New Folder](#)

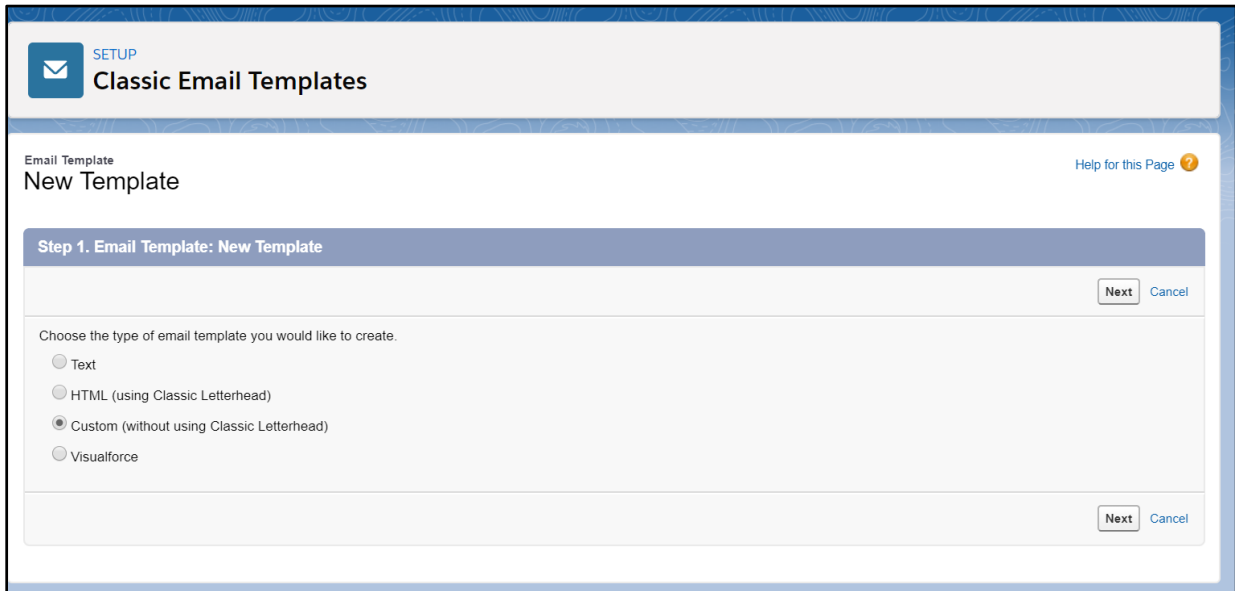
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

[New Template](#)

Action	Email Template Name ↑	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	Communities_Changed Password Email	Text	✓	Notification of new password	UUUser	8/20/2019
Edit Del	Communities_Forgot Password Email	Text	✓	Notification of new password when a user's password is reset (because they forgot it)	UUUser	8/20/2019
Edit Del	Communities_New Member Welcome Email	Text	✓	Notification that user has been added to a community.	UUUser	8/20/2019
Edit Del	Communities_One-Time Password Email	Text	✓	Email that users receive with their verification code.	UUUser	8/20/2019

2. Click on New Template, refer to the screenshot below.

3. In Step 1, select Custom (without using Classic Letterhead), as shown in the screenshot below.



4. In Email Template Name, input 'Remind Grantees to Report'. Template unique name should auto-populate to 'Remind_Grantees_to_Report'.
5. Input the subject line.
6. Below is a suggested template, and users can additionally customize per your organization's needs. Be sure to specify Reporting Period and Community link using merge fields.

The below text is for HTML formatting:

```
<p>Dear Grantee, </p>

<p>Please treat this mail as a reminder to submit your results and
report for <b>reporting period:
{!ampi__Reporting_Period__c.ampi__Label__c} </b></p>

<p>Please go to the following link to submit your report:
```

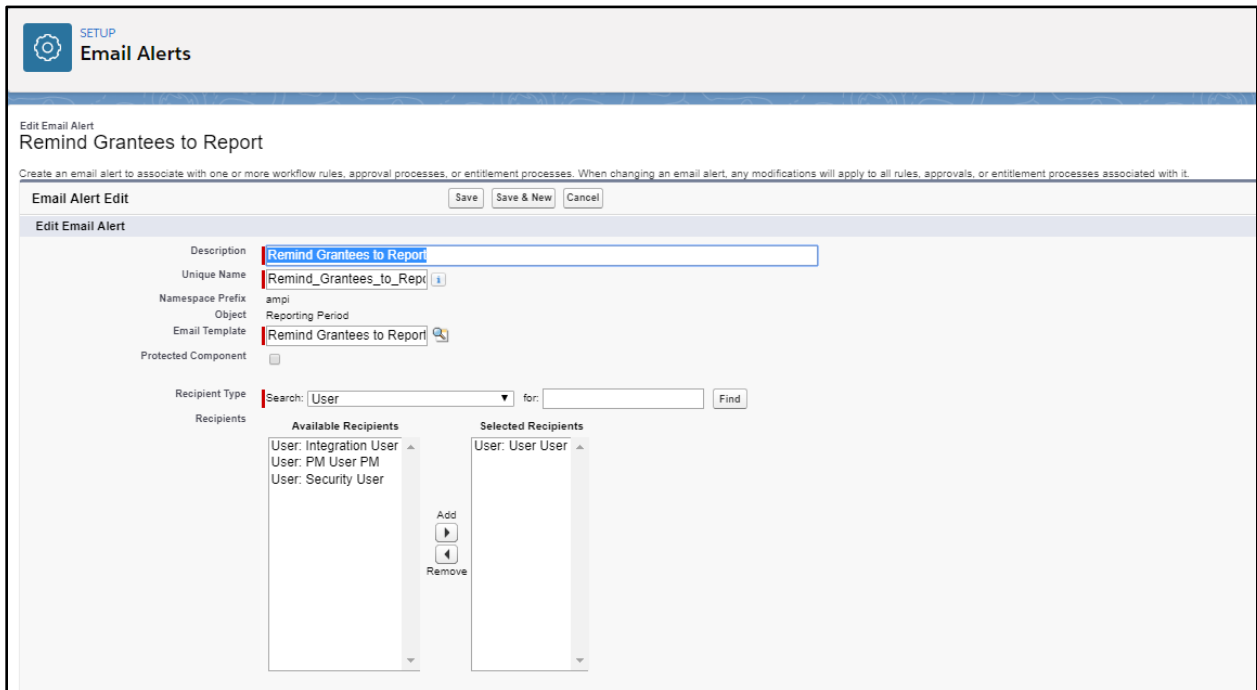
```
https://sandbox-app-energy-6958-dev-ed-16cb293fa53.cs78.force.com/test/s/detail/{!ampi__Reporting_Period__c.Id} </p>
```

<p>If you are facing problems in accessing the above link, kindly contact system admin. </p>

<p>Regards, </p>

<p>Grant Maker</p>

7. Complete plain text version of the HTML email.
 - a. Remove HTML markup including <p></p> and .
8. Return to Setup.
9. Using Quick Find, navigate to Email Alerts.
10. Create an email alert using email template and specify contacts (Salesforce/External) to whom email should be sent, shown in the screenshot below.

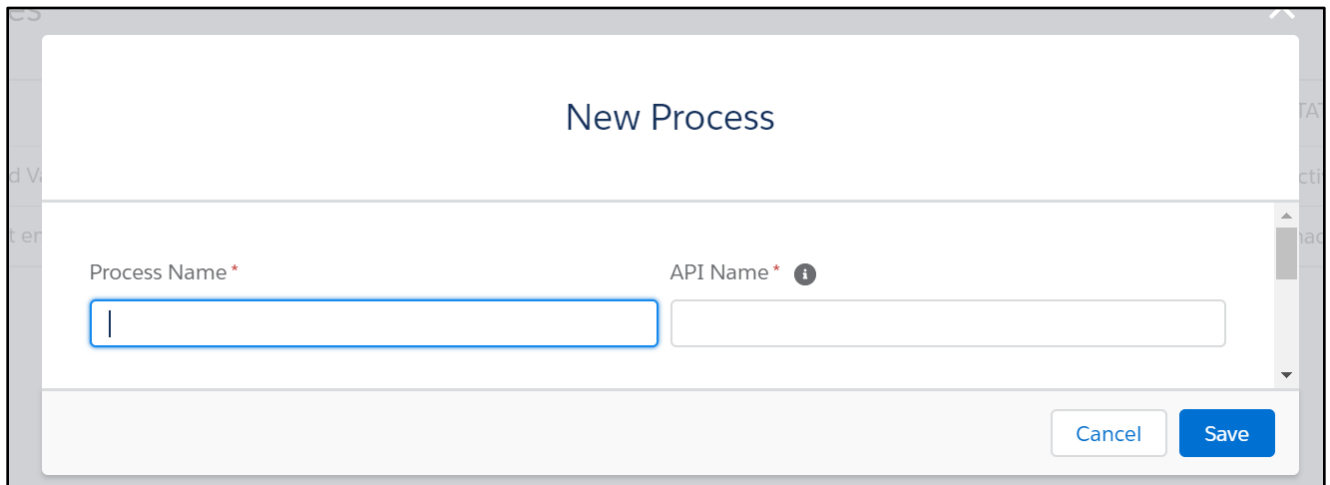


11. Click Save.

Configure Email Automation

Now that the email template and alert is set up, system admins will need to configure the email trigger and automation, known as Process in Salesforce.

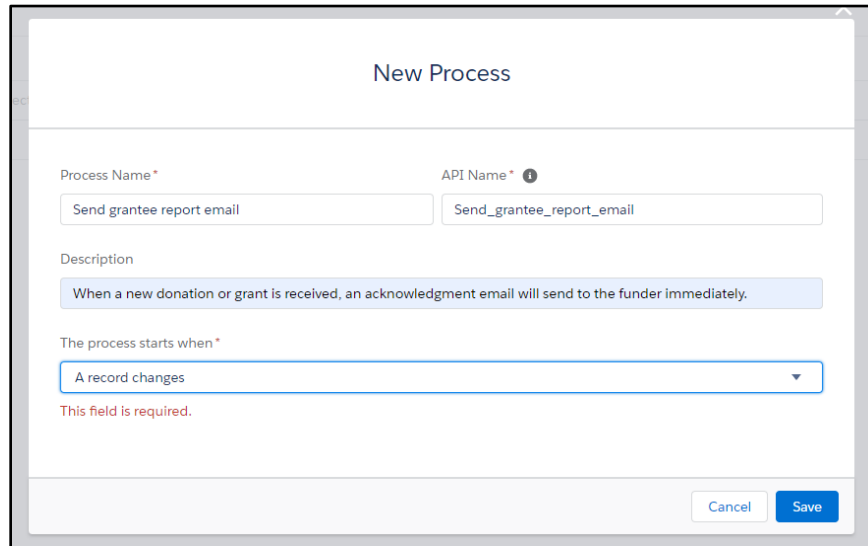
1. From Setup, navigate to Process Builder through Quick Find.
2. Click New. A pop-up will appear.



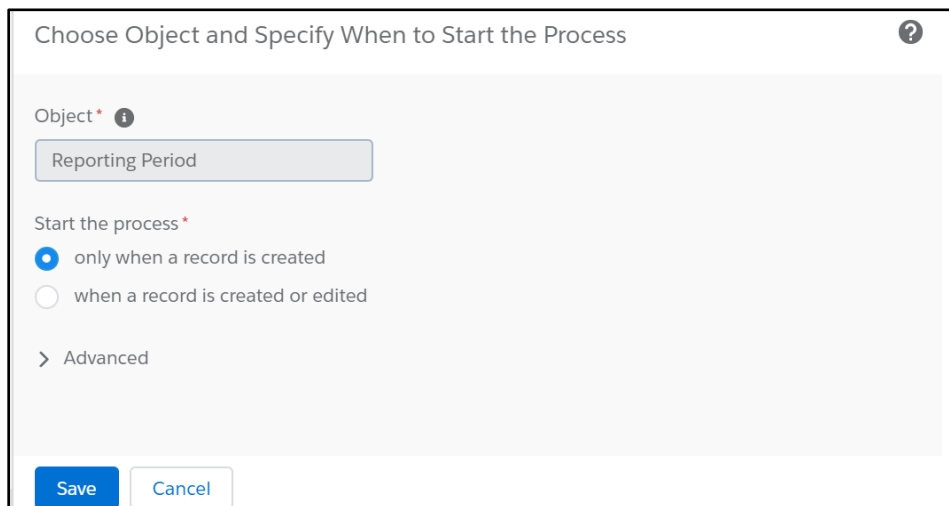
The screenshot shows a 'New Process' dialog box. It contains two input fields: 'Process Name *' and 'API Name *'. The 'Process Name' field is highlighted with a blue border. At the bottom right, there are 'Cancel' and 'Save' buttons.

3. Input 'Send grantee report email' under Process Name.

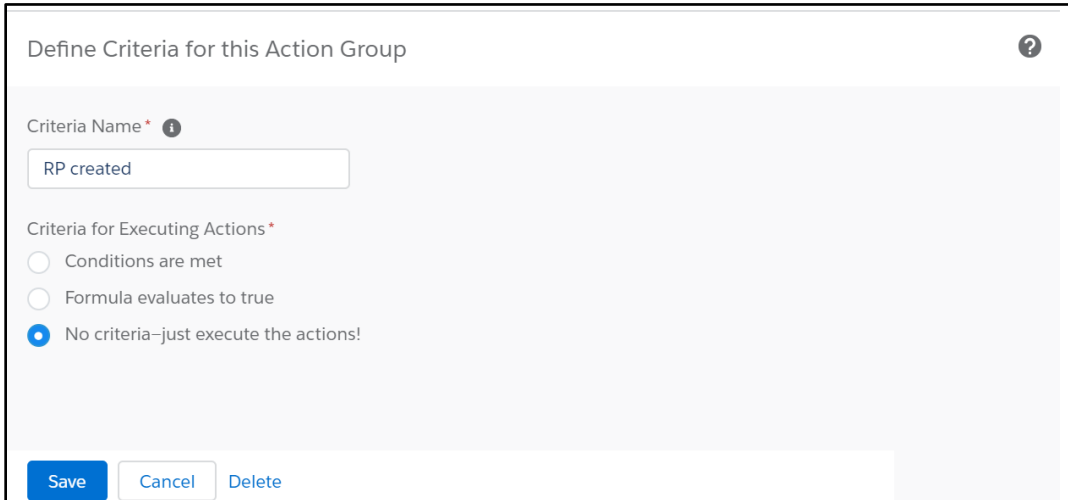
- Under the dropdown, select that this process starts when “A record changes”. Click Save.



- Right under start, click on + Add Object.
- In the Object dropdown, select Reporting Period. Start the process ‘only when a new record is created’, as shown below.



- From Reporting Period, set criteria for an action group as shown below.



Define Criteria for this Action Group

Criteria Name* ⓘ

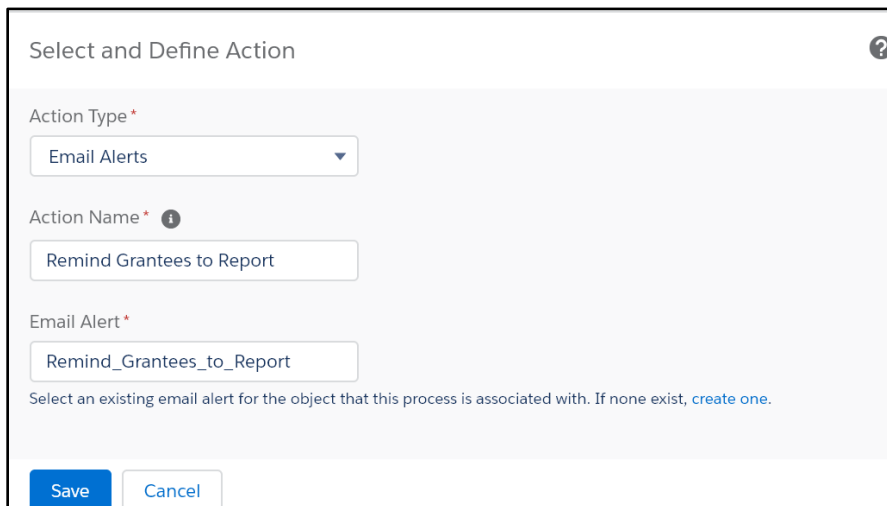
RP created

Criteria for Executing Actions*

Conditions are met
 Formula evaluates to true
 No criteria—just execute the actions!

Save Cancel Delete

- Set the immediate action to follow from if RP is created=='TRUE'.
- Set up an email alert to notify grantees 10 days in advance of a reporting period.
- Using the Time Lapse feature of Process Builder, set the immediate action to Email Alerts using the dropdown.
- In Action Name, input Remind Grantees to Report. The Email Alert name is Remind_Grantees_to_Report, as shown in the screenshot below.



Select and Define Action

Action Type*

Email Alerts

Action Name* ⓘ

Remind Grantees to Report

Email Alert*

Remind_Grantees_to_Report

Select an existing email alert for the object that this process is associated with. If none exist, [create one](#).

Save Cancel

12. Click Save.

13. To schedule the email, stay on Process Builder.

Schedule the Email

1. Ensure steps from [Configure Email Automation](#) have been completed. Remain in Process Builder.
2. Set a scheduled action to trigger the immediate action 10 days before the end of a Reporting Period.

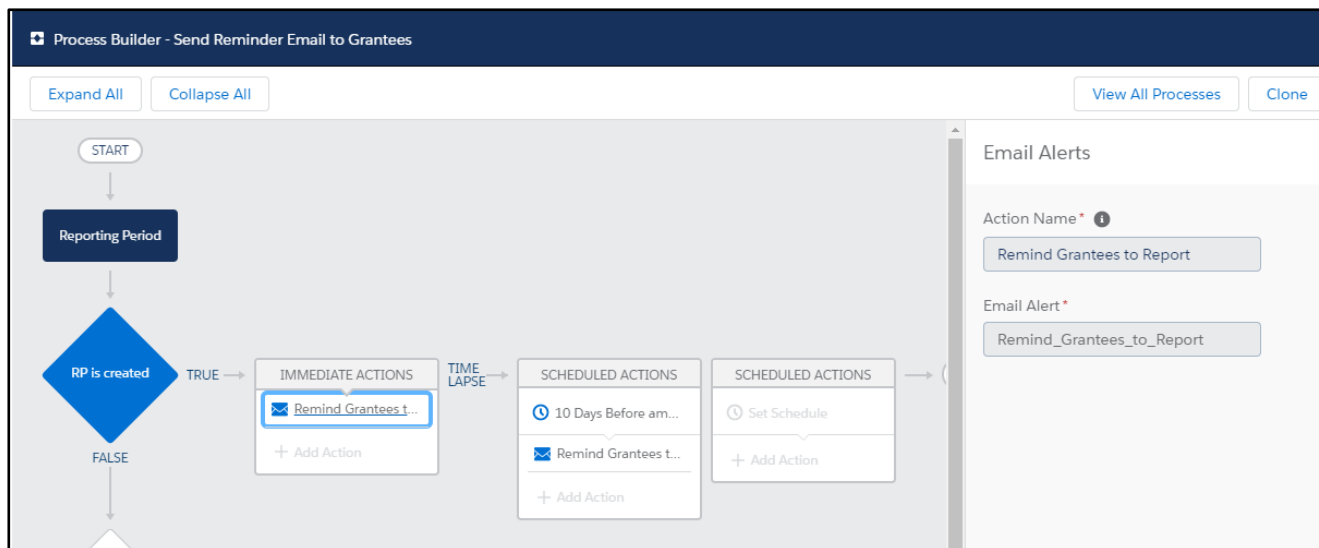
Set Time for Actions to Execute ?

10 Days Before

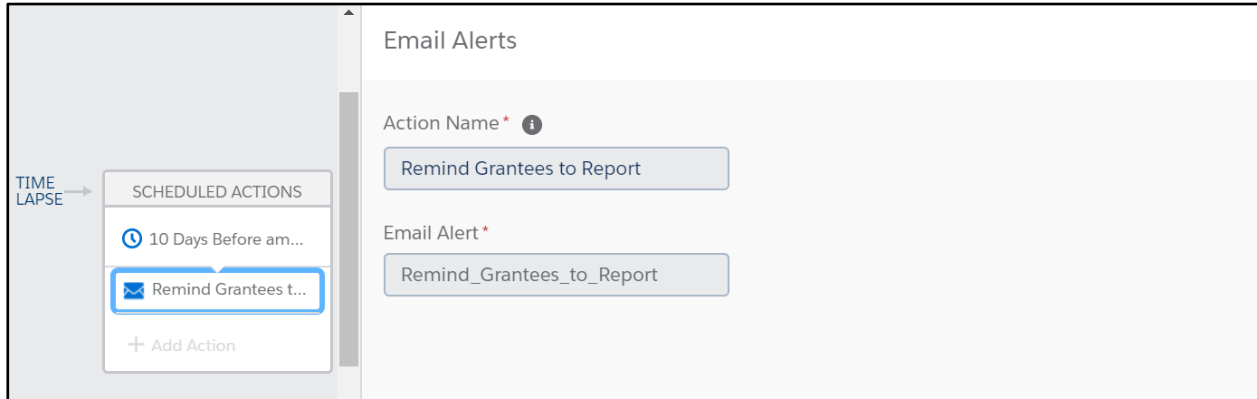
Days from now.

3. Click Save.

4. Double check that your process builder looks like the screenshot below.



5. Add another scheduled action for email trigger under the scheduled action, as shown below.



① Ensure all information is accurately filled out, as once you activate the process it is no longer editable.

6. Click Activate.