

## Salesforce Guide: Entering Preliminary Ratings

Before you will be able to submit your First Draft to the reader, you will need to enter your preliminary ratings on the Report Draft page. These are divided up into “Area of Celebration,” “Area of Focus,” and “Additional Findings.”

▼ Area of Celebration	
Indicator	Comment
Preliminary Rating	
Sub-Indicators	
Sub-indicator a) Rating	
Sub-indicator b) Rating	
Sub-indicator c) Rating	
▶ Area of Focus	
▶ Additional Findings	

### Entering Preliminary Ratings

1. Hover your cursor over the *Indicator* field in the “Area of Celebration” section. Once you do this, the field will become highlighted in pale blue.

▼ Area of Celebration	
Indicator	
Preliminary Rating	

2. Double click in the pale blue highlighted field and a drop down will appear.
3. Select the Area of Celebration indicator.
4. Continue by double clicking the *Preliminary Rating* field. Select the preliminary rating.
5. Next, select the sub-indicators you chose to write about in your report.
6. Finally, select the sub-indicator ratings. Here is an example of what your screen will look like.

▼ Area of Celebration	
Indicator	2.2 
Preliminary Rating	P 
Sub-Indicators	bc 
Sub-indicator a) Rating	P 
Sub-indicator b) Rating	P 
Sub-indicator c) Rating	P 

**NOTE:** The Answers you select for each question will be in ORANGE FONT **until you hit the Save button.** If you see orange font anywhere on the page, make sure to SAVE your work before leaving the page or submitting to reader.

7. Repeat steps 1-6 for the “Area of Focus” and the three “Additional Findings.”
8. You also have the option of leaving a comment for the AoC and AoF. For guidance on the comment sections, please reach out to Rod Bowen.

### Saving Preliminary Ratings:

9. Upon entering ratings, the entries will be in bold, orange text (see above). **You must click Save at the top of the screen** to save your entries. You will know your responses have been saved because the text will no longer be bold and orange.

▼ Area of Celebration	
Indicator	2.2
Preliminary Rating	P
Sub-Indicators	bc
Sub-indicator a) Rating	P
Sub-indicator b) Rating	P
Sub-indicator c) Rating	P

If you need further support please reach out to your Program Associate by phone or email.