

Salesforce Guide - Writing Assistant

Find a Writing Assistant:

1. Once you have logged into Salesforce (<http://login.salesforce.com>), scroll down on your homepage to the section titled "My Writing Assistants." Select the appropriate DBN from the second column called "Name." You will be directed to the Report Writing Assistant.

My Writing Assistants

DBN	Name	Reviewer
18K235	18K235	Rod Bowen
08X123	08X123	Rod Bowen
12X463	12X463	Rod Bowen

Write your report:

2. Once on the Report Writing Assistant page, click on the **Edit** button, which will enable you to write your report.

Writing Assistant Detail Edit Delete

School [75Test](#)

Writing Assistant Name [Test](#)

Reviewer [Test Reviewer](#)

Date Of Review [9/30/2014](#)

3. As soon as you click on the **Edit** button, boxes will appear, allowing you to fill in the Findings, Impact and Supporting Evidence fields.

- a. First, choose from the drop down (see below) which indicator you will be writing about. Then select the rating for that Indicator.
- b. You will choose in order of Area of Celebration, Area of Focus, and then Additional Findings.

▼ **Area of Celebration**

Indicator [4.2](#) Ratings [P](#)

- c. Continue writing the report by choosing which sub-indicators you will be writing about in the Findings portion of the report.

Findings [ab](#) [Test](#)

- d. Finally, fill out the Supporting Evidence in 3 to 5 of the fields listed below for that indicator.

Supporting Evidence 1

4. After filling in the fields, scroll to the top of the page to hit the **Save** button

Rubric Score Detail Save Cancel

▼ **Rubric Information**

School [75Test](#)

Writing Assistant Name [Test](#)

Reviewer [Test Reviewer](#)

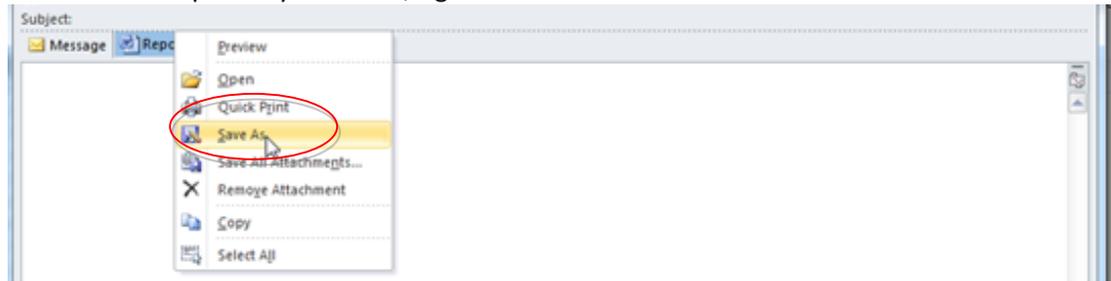
Generate Your Report

5. Once you are finished writing about the mandatory Indicators and Sub-indicators, you are ready to generate your report! Click on the **Email Report** button and the draft will be sent to your email inbox.

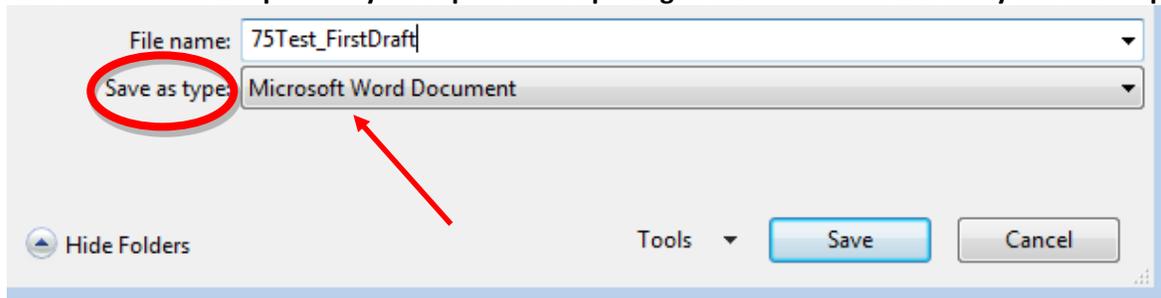
Writing Assistant Detail Edit Delete QR Rubric PDF Email Report

School [75Test](#) Owner

6. When you receive the report in your email, right click on the document and then “**Save As.**”



9. A Save Attachment box will pop up. At the bottom, make sure that you “**Save as type: Microsoft Document.**” **Not saving as a word document will prevent your report from opening in Salesforce and will delay the reader process.**



10. Finally, click **Save** and you are ready to upload your document into Salesforce!