



Salesforce Cheat Sheet

RAF Tracking Application

User Guide for Sales

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This document has instructions for sales department regarding how to use the RAF application.

1 Login and Switch to Lightning Experience

If you login as classical format, switch to Lightning Experience by clicking the link at top right, as illustrated in Fig. 1. This step is not necessary, just to let you know that this module is designed for Lightning Experience.

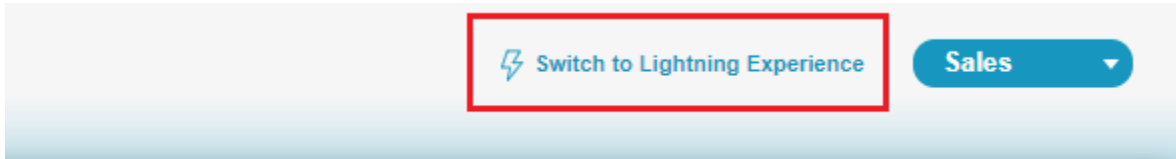


Figure 1. Switch to Lightning Experience

2 Two Ways to Create a RAF

2.1 Automatically Create a New RAF via a New No Charge Request

Step 1. Create a new No Charge Request (refer to no charge request user reference 1.2) and tick “New RAF Required”. As shown in Figure 2.

Step 2. Click “Save” button to save the No Charge Request record. Then a new related RAF is automatically created.

Step 3. Click RAF (shown as RAF-000***) and go to the RAF page. As shown in Figure 3, fill in all information necessary (fields with red asterisk mark or circled in red), including but not limited to: “Number Of Windows To Be Returned, Number Of Patio Doors To Be Returned, Number Of Doors To Be Returned”.

Step 4. Please mention line numbers and quantities of each line to be returned in “Explanation” field. As shown in Figure 4.

Step 5. Submit the No Charge request for approval by click “Submit for Approval” button. As shown in Figure 5.

Note:

- If a No Charge Request is related to a RAF, this No Charge Request **cannot** go to **approval process** (as shown in Figure 6) until the required information in RAF is completed. Please fill in the 3 number of products record fields before submitting the No Charge Request for approval.
- Fields shown as following are automatically synced from the related No Charge Request: Original Order, New Quote, No Charge Request, Commercial Site, Account, Sales Rep, Address and Explanation.
- The value of RAF fields “Total Number To Be Returned”, “Total Number Received”, “Total Pending Items To Be Received” are calculated based on other fields (the 6 number of products record fields) automatically.
- When you update the No Charge Request information (such as “Original Order Number” and “New Order Number”), the related RAF is updated automatically.
- After you have created a new No Charge Request without ticking “New RAF Required”, you are able to tick “New RAF Required” and create a new RAF automatically. This should be done before the related No Charge Request is submitted for approval (No Charge Request is not editable after it is submitted for approval).

New No Charge Request: No Charge Order

Information


* No Charge Reason --None--	* Status Not Submitted
No Charge Number	Owner
Original Order Number Search Sales Orders...	Sales Rep Email
* New Order Number Search Sales Quotes...	Chargeback To
No Charge Amount	Chargeback Amount \$0.00
RAF Search RAF..	
New RAF Required <input checked="" type="checkbox"/>	
* Explanation	


Figure 2. Tick 'New RAF Required'.


★ RAF
RAF-000016


Details Related


RAF Number
RAF-000016


Pickup ETA 


Original Order
[test03133](#) 


New Quote
[test03133](#) 


No Charge Request
[00178](#) 

Number Of Windows To Be Returned 

Number Of Patio Doors To Be Returned 

Number Of Doors To Be Returned 

Number Of Windows Received 

Number Of Patio Doors Received 


Number Of Doors Received 

Figure 3. Fill in the information of required fields.

Ship To Province

Ship To PCode

Ship To Ph

Please mention line numbers and quantities of each line to be returned.


Explanation 

Figure 4. Please fill in Explanation in RAF.

Submit for Approval Edit Change Owner

ACTIVITY

Figure 5. Submit No Charge Request for approval.

No applicable approval process was found.

Figure 6. Fails to submit No Charge Request for approval.

2.2 Manually Create a New RAF

If you are to create a new RAF manually (without knowing whether this RAF is related to a No Charge Request or not), please follow these steps:

Step 1. Click the symbol on the top left. Select “RAF”, as shown in Figure 7.

Step 2. Click “New” button circled red in Figure 7 to create a new RAF.

Step 3. Fill in all information necessary (fields with red asterisk mark or circled in red) as shown in Figure 8, including but not limited to: “Original Order Number, New Quote Number, Account, Explanation, Number Of Windows To Be Returned, Number Of Patio Doors To Be Returned, Number Of Doors To Be Returned”. If not, the system will show error, as shown in Figure 9. The RAF Status default is Open.

Step 4. Click “Save” button to save the new created RAF.

So far, you have already manually created a New RAF.

If this new create RAF is related to one existed/new No Charge Request, please follow the four steps in section 2.2 and then follow the two steps as following:

Step 5. Click “No Charge Request” field, as shown in Figure 10. Search and select (or create) the related No Charge Request so that it will link to this RAF.

Step 6. Click “Save” button. You may see the related No Charge Request in the RAF details page and related page, as shown in Figure 11.

Note:

- After you link the RAF with No Charge Request, the RAF would automatically change when you update the related No Charge Request.
- We recommend that RAF is created automatically when creating No Charge Request, which reduces the workload and **avoids cross-linking**.

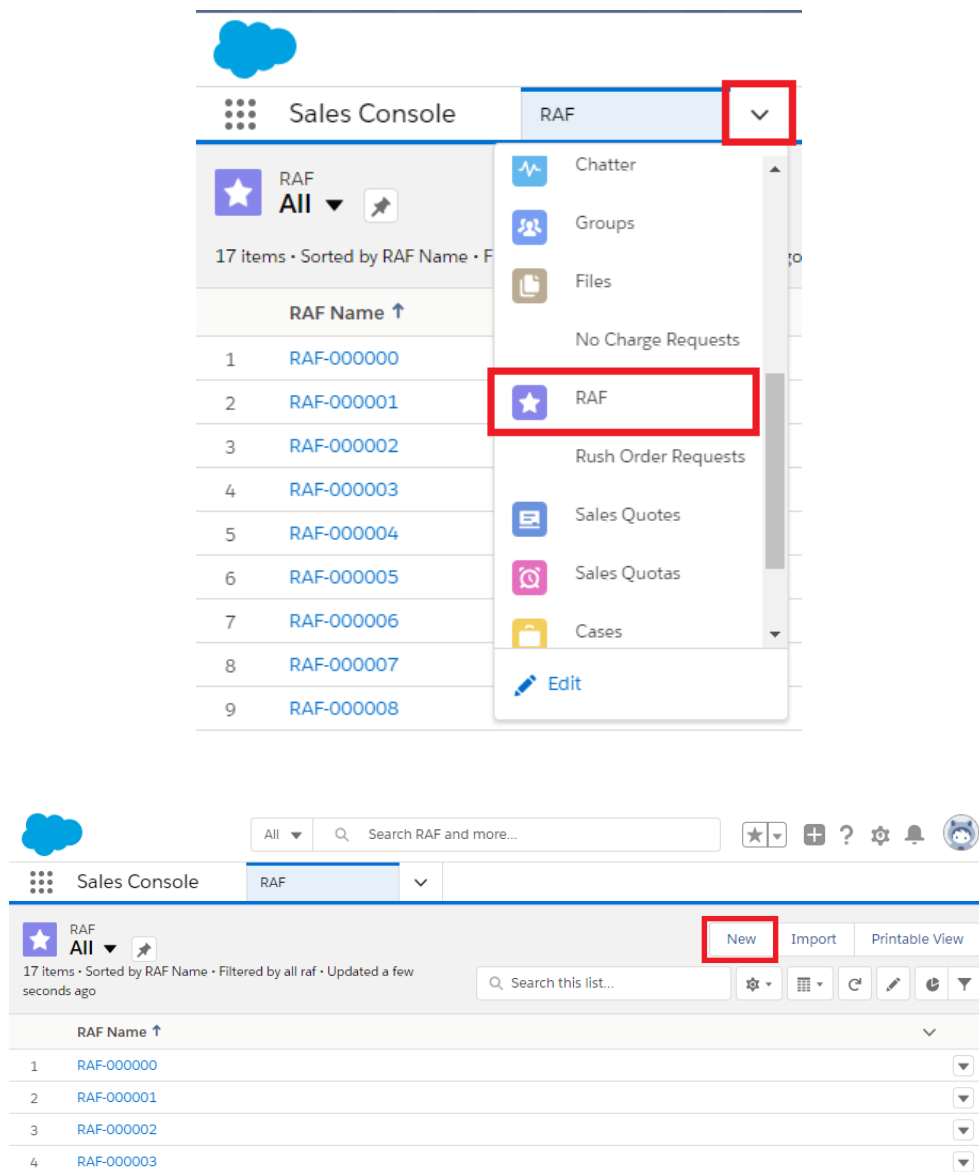


Figure 7. Open and create a new RAF in Salesforce.

The screenshot shows the 'New RAF' form in Salesforce. The 'Information' section contains several fields, with red boxes highlighting the following required fields:

- Status:** A dropdown menu with 'Open' selected.
- Account:** A search field labeled 'Search Accounts...'.
- Product Received Date:** A date picker field.
- Original Order:** A search field labeled 'Search Sales Orders...'.
- New Quote:** A search field labeled 'Search Sales Quotes...'.
- No Charge Request:** A search field labeled 'Search No Charge Requests...'.
- Number Of Windows To Be Returned:** A text input field.
- Number Of Patio Doors To Be Returned:** A text input field.
- Number Of Doors To Be Returned:** A text input field.
- Explanation:** A large text area with an information icon.

Other visible fields include: RAF Name, Pickup ETA, Responsible Person, Ship To, Ship To Street, Ship To City, Ship To Province, Ship To Phone, Reason For Product Shortfall (with a rich text editor), and Number Of Windows Received. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

Figure 8. Fill in the required fields information of RAF.

New RAF

Review the errors on this page.

These required fields must be completed: Account

New RAF

Review the errors on this page.

The 'Total Number To Be Returned' should not be blank or zero. Please fill in the Numbers of Windows/ Patio Doors/ Doors to be returned.

Figure 9. Validation rules of RAF.

RAF-000017

Details Related

RAF Name
RAF-000017

Pickup ETA
2/29/2020

Original Order
test03133

New Quote
test03133

No Charge Request
00176

Number Of Windows To Be Returned
10

Number Of Patio Doors To Be Returned
3

Number Of Doors To Be Returned
2

Cancel

Figure 10. Search and select (or create) the related No Charge Request.

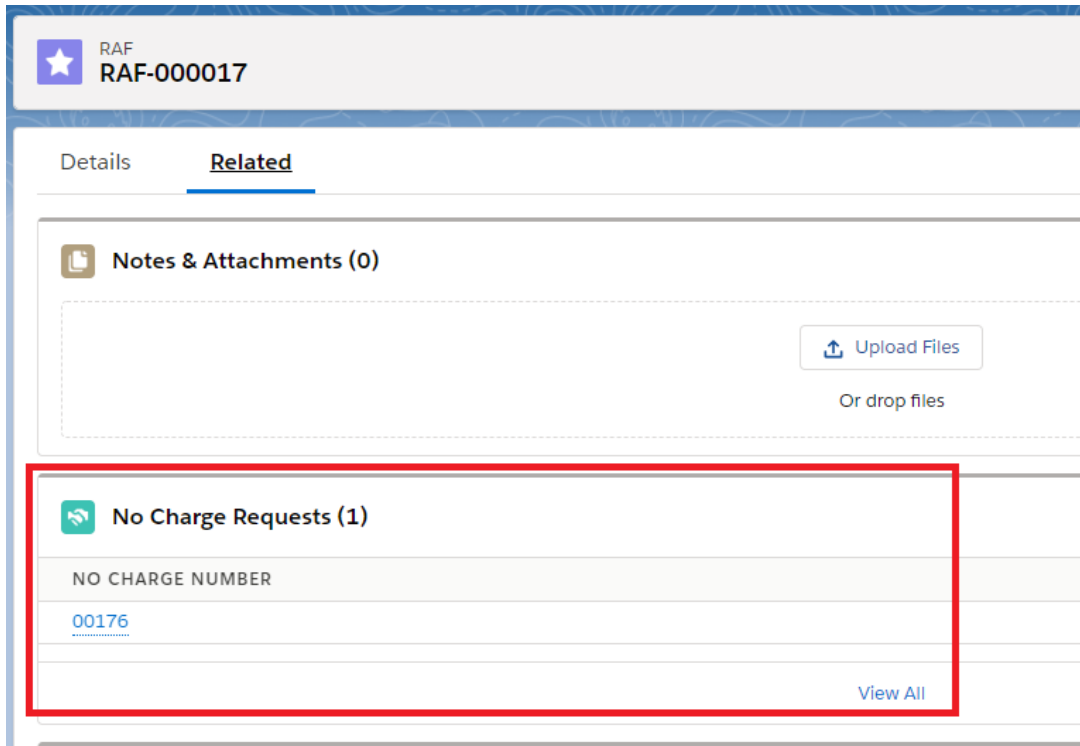


Figure 11. Where to see the related No Charge Request.

Note:

The RAF is available on web browser (accessible from PC or mobile) and mobile app.

Please refer to No Charge Request User Reference.