



ADDING A NEW COMMITTEE

STEP 1: FROM SALESFORCE, HIT THE GEAR ICON TO SEE THE DROPDOWN MENU



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STEP 2: CLICK SETUP FROM THE DROP DOWN MENU



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STEP 3: TYPE **"PUBLIC** GROUPS" INTO THE QUICK FIND **BOX ON THE** LEFT-HAND SIDE AND CLICK ON **"PUBLIC GROUPS**"



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STEP 4: HIT THE NEW BUTTON IN THE CENTER OF THE PUBLIC GROUP PAGE



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STEP 5: TYPE IN THE NAME OF THE COMMITTEE INTO THE LABEL FIELD. HIT SAVE. NOTE THE GROUP NAME SHOULD AUTO **POPULATE FROM** THE LABEL FIELD



STEP 6: CLICK ON THE PUBLIC GROUP THAT HAS BEEN CREATED



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STEP 8: CLICK ON THE APP LAUNCHER ON THE LEFT-HAND SIDE AND HIT THE AFDO **APP FROM THE DROPDOWN MENU NOTE: IF YOU** CANNOT SEE THE AFDO APP FROM THE MENU TYPE IN AFDO IN THE SEARCH BAR **OF THE APP** LAUNCHER



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STEP 9: GO TO THE COMMITTEES TAB AT THE TOP OF THE AFDO **APP NAVIGATION** BAR



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STEP 11: SELECT THE COMMITTEE RECORD TYPE AND PRESS NEXT

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STEP 12: FILL OUT ALL OF THE **COMMITTEE'S** INFORMATION. NOTE: THE COMMITTEE MUST BE ACTIVE **IN ORDER TO ADD MEMBERS**



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STEP 13: ADD THE NAME OF THE PUBLIC GROUP YOU JUST CREATED TO THE "PUBLIC GROUP NAME" FIELD AND PASTE THE 15 DIGIT CODE YOU COPIED **TO YOUR CLIPBOARD IN THE** "PUBLIC GROUP ID" FIELD AND HIT SAVE



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STEP 14: HIT THE GEAR ICON **AND SELECT SETUP FROM** THE DROPDOWN MENU



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STEP 15: TYPE SHARING SETTINGS INTO THE QUICK FIND BOX AND **HIT SHARING** SETTINGS IN THE MENU



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STEP 16: FIND THE COMMITTEE **OBJECT IN THE "MANAGE** SHARING SETTINGS FOR:" DROPDOWN MENU



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STEP 17: SCROLL DOWN TO THE COMMITTEE **SHARING RULES AND HIT NEW**



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STEP 18: IN STEP 1 LABEL THE SHARING SETTING AS "SHARE **`COMMITTEE** NAME' WITH **YUBLIC GROUP** NAME' GROUP" THE **RULE NAME WILL** AUTOMATICALLY POPULATE



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STEP 19: IN STEP 2 CLICK "BASED ON CRITERIA"



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STEP 20: IN THE FIRST CRITERIA LINE ADD "ACTIVE COMMITTEE?" EQUALS TRUE AND IN THE SECOND CRITERIA LINE ADD "COMMITTEE NAME'' = `NEWCOMMITTEE NAME'



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STEP 21: IN STEP 4 SELECT PUBLIC **GROUP AS THE** "SHARE WITH" **DROPDOWN AND ADD** THE NEW PUBLIC **GROUP YOU CREATED** IN THE RIGHT **DROPDOWN MENU.** IN STEP 5 MAKE SURE **ACCESS LEVEL IS SET** TO "READ ONLY" AND HIT SAVE



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STEP 22: HIT OBJECT MANAGER IN THE SETUP TAB MENU



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STEP 23: TYPE CONTACT INTO THE OBJECT MANAGER **QUICK FIND BOX AND** SELECT CONTACT



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STEP 24: GO TO THE FIELDS & RELATIONSHIPS TAB ON THE LEFT-HAND SIDE



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STEP 25: TYPE COMMITTEE PREFERENCE INTO THE FIELDS 8 RELATIONSHIPS **QUICK FIND BOX AND SELECT** COMMITTEE PREFERENCE



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STEP 26: SCROLL DOWN TO VALUES ON THE COMMITTEE PREFERENCE PAGE AND HIT NEW



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STEP 27: TYPE THE NAME OF THE NEW COMMITTEE INTO THE TEXT **BOX AND HIT** SAVE



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STEP 28: CLICK **ON THE APP** LAUNCHER IN THE TOP LEFT **CORNER AND** SELECT JOTFORM FROM THE DROPDOWN MENU



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STEP 29: HIGHLIGHT THE "PORTAL ONLY COMMITTEE PREFERENCE FORM" AND SELECT EDIT FORM



STEP 30: CLICK **ON THE "WHICH** COMMITTEE WOULD YOU LIKE TO JOIN" FIELD AND HIT "ADD OPTION"



STEP 31: CLICK ON THE "WHICH COMMITTEE WOULD YOU LIKE TO JOIN" FIELD AND HIT "ADD **OPTION" AND TYPE IN THE NEW COMMITTEE'S** NAME



STEP 32: SCROLL TO THE TOP OF THE PAGE AND **CLICK ON THE** JOTFORM LOGO



STEP 33: HIGHLIGHT THE **"NON-PORTAL** COMMITTEE PRESERENCES FORM" AND SELECT EDIT FORM. REPEAT **STEPS 30-32**



STEP 34: RETURN TO THE AFDO APP BY HITTINGTHE **APP LAUNCHER AND SELECTED** AFDO FROM THE DROPDOWN MENU







YOUR COMMITTEE HAS NOW BEEN SET UP AND IS AVAILABLE FOR COMMITTEE MEMBERS TO SEE IN THE AFDO COMMUNITY PORTAL AND FOR NEW MEMBERS TO JOIN