

United States Coast Guard (USCG)
Auxiliary Salesforce User Guide
Auxiliary Member (AUX) Patrol Orders





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WIIFM?

What's In It For Me? Salesforce is a state-of-the-art, cloud-based, customer relationship management (CRM) tool that has been customized to meet the business needs of the USCG. Salesforce provides you with a faster, scalable, and more functional way to capture and store information, drive business processes, and ensure that the USCG is "ready, relevant, and responsive." The modernization of the AUXDATA system aligns with USCG strategic goals and enables greater visibility, ownership, and automation of business processes.



Getting Started

How to use this User Guide



Business Process

Check the sidebar for important business process call-outs!



IMPORTANT

Very important notes will be called out by this red exclamation point. Be sure to pay attention to them!



HINTS & TIPS

We will include helpful hints and tips to show users how to use Salesforce efficiently.



WIIFM?

What's In It For Me? This section will include information to help users understand the advantages and benefits to using Salesforce.

Each page of this User Guide contains explanations, step-by-step instructions, screen shots, and tables to help users perform specific tasks in Salesforce. Users are encouraged to insert any personal notes that may help them use this document as a reference for the USCG processes that are integrated in Salesforce.





This User Guide will use numbered steps to help users identify the sequence of a multi-step process.



WELCOME KATE QUIZ!

QUICK LINKS
NATIONAL WEBSITE
Official website of the USCG Auxiliary
CGAUSA
Official website of the CC Auxiliary Association
AUXILIARY MANUALS
Auxiliary Rules and Program Manuals

This User Guide will use call-out boxes like this one to draw attention to important information in screen shots.

Page Element	Definition
Tables 	This User Guide will use tables to display an abbreviated list of related content in an organized way.
Screen Shots 	This User Guide will provide screen shots from Salesforce whenever possible to support the learning process.



Create a Patrol Request

The screenshot shows the U.S. Coast Guard Auxiliary website. The navigation menu at the top includes: Home, Members, Units, Activity Logs, Facilities, Facility Inspections, **Requests** (circled in red), and More. The main content area features a hero image with the text "Build Skills That Save Lives" overlaid. Below the hero image, there is a "WELCOME KATE QUIZ!" section. To the right, there is a "QUICK LINKS" section with three items:

- NATIONAL WEBSITE**
Official website of the USCG Auxiliary
- CGAUXA**
Official website of the CG Auxiliary Association
- AUXILIARY MANUALS**
Auxiliary Policy and Program Manuals

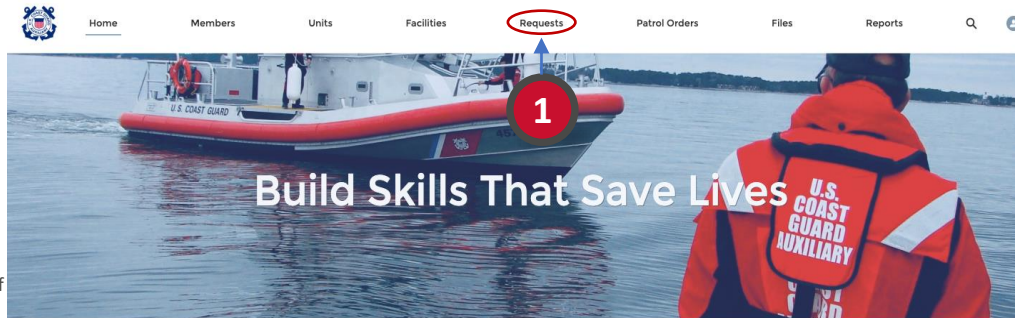


Create a Patrol Request

Prior to conducting a patrol, members must submit a Patrol Request and receive approval from the Order Issuing Authority (OIA).

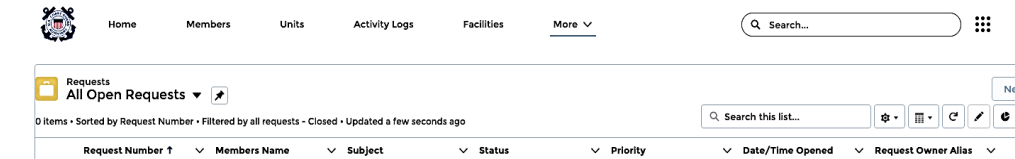
1

After logging in as a **USCG Auxiliary Community Member**, Select the **'Request'** tab at the top of the page.



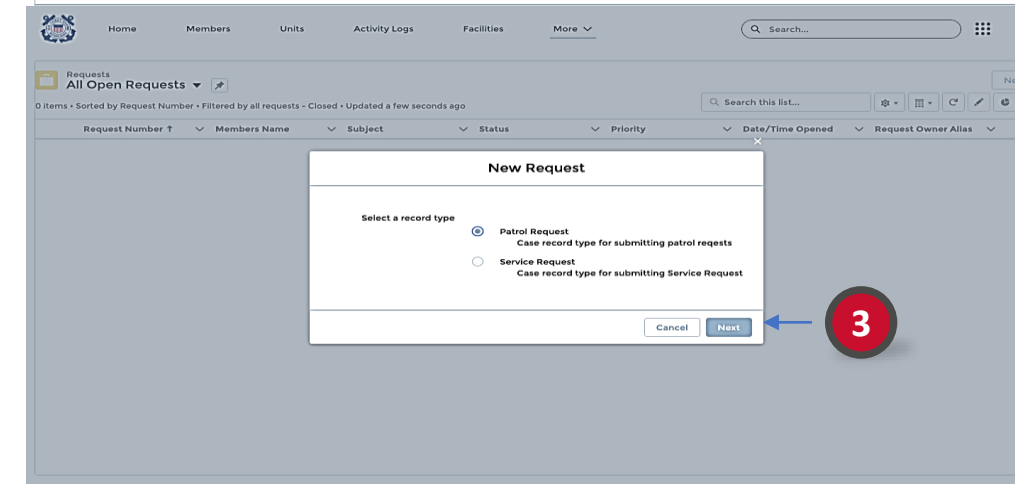
2

Click **'New'** in the upper right corner.



3

Ensure Patrol Request option is selected and Click **'Next.'**



Note: A new patrol must begin with a **"PATROL REQUEST."** Select the **"Requests"** Tab on the header. Do NOT go directly to **"Patrol Orders"**



Create a Patrol Request

An AUX Member can submit a patrol request for a mission or recurring activity.

4
Populate the following fields on the 'New Request: Patrol Request':

- A. Facility
- B. Facility Owner Type
- C. Operator
- D. Patrol Date
- E. Patrol Time
- F. Patrol Type
- G. Status
- H. Reimburse
- I. Description

5
Leave Status as 'New' for now.

6
Click 'Save'.

New Request: Patrol Request

4

* Facility: Search Facilities...
 Facility Owner Type: --None--
 Operator: Search Members...
 Patrol Date: [Calendar icon]

5

* Status: New
 * Reimburse: --None--

Patrol Location: [Dropdown]
 Sub-Unit: [Text]
 Patrol Area: [Text]
 Description: [Text area]

Patrol Time: --None--
 Facility Type: --None--
 View all dependencies

Patrol Type: --None--
 View all dependencies

System Information

Request Owner: LESLIE PELOSI
 Patrol Order: [Text]

Subject: [Text area]

Members Name: Search Members...
 Fill in your name here

Buttons: Cancel, Save & New, Save

Facility Owner Type

Owner Not On Board

--None--
 Owner is Operator
 Owner On Board
 Owner Not On Board

Facility Owner Type Definitions:

- **Owner is Operator:** Owner is operating the facility for that particular patrol
- **Owner on Board:** Implies that owner is on board but is not operating the facility for that patrol
- **Owner Not on Board:** Implies that the owner is not on board (no other implications)

Reimburse Entry:

- **Owner – reimbursement goes to facility owner**
- **Operator - reimbursement goes to facility operator**
- **Owner – No SAMA - for facilities not claiming/authorized for SAMA**
- **Operator – No SAMA - for facilities not claiming/authorized for SAMA**
- **No Reimbursement – non-reimbursable orders**

Operator Entry:

- **Drop down list with recent facility operators**
- **Select any permitted operator (coxswain, pilot, etc.)**



BUSINESS PROCESS

Request has been saved but not submitted for approval. Before a Request can be submitted for approval, the Patrol Location needs to be added .



Create a Patrol Request



An AUX Member can submit a patrol request for a mission or recurring activity.

Request + Follow

7

Click 'Assign Locations'

7

Status	Request Number
New	00025796

Assign Locations

Facility	Status
F-23287	New
Facility Name	Reimburse
F-23287	OPERATOR
Facility Owner Type	Patrol Location
Owner Not On Board	
Operator	Sub-Unit
301 NMN Jones	
Patrol Date	Patrol Area
4/2/2020	
Patrol Time	Description
MORNING	
Facility Type	
Boat	
Patrol Type	
OIA: MARITIME OBSERVATION (MOM)	

8

Enter a Location, Sub Unit and Patrol Area, and click 'Save'.

Assign Locations

* Location 8

--None--

Sub Unit

--None--

Patrol Area

- Location**
- Location auto-populates with assigned area or recent choices, or enter manually
 - Sub-Unit does not apply to aviation patrols



BUSINESS PROCESS

Selecting a location increases efficiency for patrol request management as patrol requests are routed to OIAs specified by the assigned location or subunit.



Create a Patrol Request



An AUX Member can submit a patrol request for a mission or recurring activity.



Status: New
Request Number: 00025796

9

Ensure all details are entered correctly and update the Status field to 'Requested'.

WARNING: Do NOT select Approved or Denied Status as an AUX Member.

10

Click 'Save'. Now the Patrol Request has been submitted for approval.

WARNING: Do NOT make any changes once submitted for approval.

Assign Locations

Facility: F-23287

Facility Name: F-23287

Facility Owner Type: Owner Not On Board

Operator: Jill NMN Jones

Patrol Date: 4/2/2020

Patrol Time: MORNING

Facility Type: Boat

Status: Requested

Reimburse: OPERATOR

Patrol Location: Sector Northern New England

Sub-Unit: Station Eastport

Patrol Area:

Description:

Buttons: Cancel, Save

9

10



BUSINESS PROCESS

Patrol Request has been submitted for approval.