# **Self-Help Guide**

# **Enterprise CRM**

This Self-Help Guide may change as more users onboard to the Enterprise CRM platform. Instructions provided are intended to assist in explaining and navigating the current functionality but we'd like it to evolve to fit your needs! Use the Feedback option at the bottom of this page or a specific set of instructions to let us know things you'd like to see.

Not seeing some functionality listed but think you want to use it? Contact your Internal CRM Support team so that they can work with you on ensuring the functionality is the best fit for your intended business purposes.

Items marked with \* may require special or manager level access.

# **Get Started with Salesforce**

# **Privacy and Sharing**

## **Understand Default Privacy Settings**

Understand Privacy Settings /services-technologies/how-tos/enterprise-crm-understand-privacy

## **Understand Sharing Options**

Understand Sharing /services-technologies/how-tos/enterprise-crm-understand-sharing

#### **Access Salesforce**

### Log into Salesforce

Log in for the First Time

https://help.salesforce.com/apex/HTViewHelpDoc?id=basics\_intro\_logging\_in.htm&l...

Troubleshoot Login Issues

https://help.salesforce.com/HTViewHelpDoc?id=getstart\_login.htm&language=en\_US

### **Basic Navigation**

Navigate Salesforce Tabs

https://help.salesforce.com/articleView?id=user\_alltabs.htm&type=5

Tips for New Users

https://help.salesforce.com/articleView?id=basics\_intro\_tips\_new\_users.htm&type...

Use the Global Search Bar

/services-technologies/how-tos/enterprise-crm-use-global-search-bar

#### **Review Your Personal Information**

Find Your Personal Settings

https://help.salesforce.com/apex/HTViewHelpDoc?id=basics\_nav\_personal\_settings...

#### **Access Martin - Our Full Sandbox Environment**

Martin - Our Full Sandbox Environment

/services-technologies/how-tos/enterprise-crm-access-martin-our-full

### **Customize Salesforce**

## **Customize Display Information**

Customize Your Pages

 $\underline{https://help.salesforce.com/HTV iewHelpDoc?id=user\_userdisplay\_pages.htm\&languag...}$ 

**Customize Your Tabs** 

https://help.salesforce.com/HTViewHelpDoc?id=user\_userdisplay\_tabs.htm&language...

#### **Customize Views**

Create Views

/services-technologies/how-tos/enterprise-crm-create-views

# **Create Email Templates**

#### **Merge Fields**

Merge Fields Overview

https://help.salesforce.com/apex/HTViewHelpDoc?id=valid\_merge\_fields.htm&langua... Considerations for Using Merge Fields in Email Templates

https://help.salesforce.com/HTViewHelpDoc?id=merge\_fields\_email\_templates.htm&l...

### **Create Different Types of Email Templates**

Create HTML Email Templates

 $\underline{https://help.salesforce.com/HTViewHelpDoc?id = creating\_html\_email\_templates.htm\&...}$ 

Create Text Email Templates

https://help.salesforce.com/HTViewHelpDoc?id=creating\_text\_email\_templates.htm&...

Create Custom HTML Email Templates

https://help.salesforce.com/HTViewHelpDoc?id=creating\_custom\_html\_email\_templat...

# **Manage Email Templates**

Manage Email Templates

https://help.salesforce.com/HTViewHelpDoc?id=admin\_emailtemplates.htm&language=...

### **Use Chatter**

## **Set up Your Chatter Profile**

Set Up Your Chatter Profile

https://help.salesforce.com/apex/HTViewHelpDoc?id=basics intro setting up chatt...

# **Communicate with Others Using Chatter**

Post Visibility

https://help.salesforce.com/apex/HTViewHelpDoc?id=collab post visibility.htm&la...

Replying to Chatter Email Notifications

https://help.salesforce.com/apex/HTViewHelpDoc?id=collab\_email\_reply.htm&langua...

@Mention People and Groups in Posts and Comments

https://help.salesforce.com/apex/HTViewHelpDoc?id=collab add mentioning people...

#### **Use Chatter on Records**

Follow Records

https://help.salesforce.com/HTViewHelpDoc?id=collab\_following\_records.htm&langu...

Viewing Record Feeds

https://help.salesforce.com/apex/HTViewHelpDoc?id=collab viewing record updates...

### **Chatter Groups**

**Chatter Groups** 

https://help.salesforce.com/apex/HTViewHelpDoc?id=collab group about.htm&langua...

## **Application User Guides**

## Cirrus Insight

Tutorials for Cirrus Insight

https://www.cirrusinsight.com/tutorials

This leads to a Cirrus page with relevant Salesforce Tutorial Links

### **Submit Internal Cases**

# Submit New User, Enhancement, and Bug Fix Requests

Create an Internal Support Case

/services-technologies/how-tos/enterprise-crm-create-internal-support

## **Verify Enhancements and Fixes**

Verify a Case in Martin

/services-technologies/how-tos/enterprise-crm-verify-case-in-martin

# **Work with Records**

#### **Create Activities**

#### **Make Tasks and Events**

Create a Task

/services-technologies/how-tos/enterprise-crm-create-task

Create an Event

/services-technologies/how-tos/enterprise-crm-create-event

#### **Add Notes or Attachments**

Add a Google Doc

/services-technologies/how-tos/enterprise-crm-add-google-doc

Add a Note

/services-technologies/how-tos/enterprise-crm-add-note

Add an Attachment

/services-technologies/how-tos/enterprise-crm-add-attachment

### Log Calls and Send Emails

Log a Call

/services-technologies/how-tos/enterprise-crm-log-call

Send an Email

/services-technologies/how-tos/enterprise-crm-send-email

#### **Work with Public Records**

## **Create Contacts and Organizations**

Manually Create a Contact record

/services-technologies/how-tos/enterprise-crm-manually-create-contact

Manually Create an Organization Record

/services-technologies/how-tos/enterprise-crm-manually-create-0

#### Work with Bios

Bios Record Types

/services-technologies/how-tos/enterprise-crm-bios-record-types

Create Bios

/services-technologies/how-tos/enterprise-crm-create-bios

### **Work Privately with Reserved Data Records**

#### **Work with Reserved Contact Data**

Reserved Contact Data

/services-technologies/how-tos/enterprise-crm-reserved-contact-data

Manually Create Reserved Contact Data

/services-technologies/how-tos/enterprise-crm-manually-create-reserved

### **Work with Reserved Organization Data**

Reserved Organization Data

/services-technologies/how-tos/enterprise-crm-reserved-organization

Manually Create Reserved Organization Data

/services-technologies/how-tos/enterprise-crm-manually-create-reserved-0

### **Work with Leads**

#### **Create Leads**

Manually Create a New Lead

/services-technologies/how-tos/enterprise-crm-manually-create-new-lead

#### **Convert Leads**

Use Find Duplicates on Leads

/services-technologies/how-tos/enterprise-crm-use-find-duplicates-leads

Convert Leads

/services-technologies/how-tos/enterprise-crm-convert-leads

# **Work with Opportunities**

### **Create Opportunities**

Manually Create an Opportunity /services-technologies/how-tos/enterprise-crm-manually-create

#### **Manage Opportunities**

Manage Opportunities /services-technologies/how-tos/enterprise-crm-manage-opportunities

## **Work with Tags**

#### **Create Tags**

Manually Create Tags /services-technologies/how-tos/enterprise-crm-manually-create-tags

## **Assign Tags**

Add New Tag Assignments /services-technologies/how-tos/enterprise-crm-add-new-tag-assignments

#### **Work with Interested Parties**

#### **Create Interested Parties**

Manually Create a New Interested Party record /services-technologies/how-tos/enterprise-crm-manually-create-new

### **Manage Interested Parties**

Add Interested Party Assignments, Users, and Change record Owners /services-technologies/how-tos/enterprise-crm-add-interested-party

# **Work with Reports and Data**

#### **List Views**

#### **Create Customized List Views**

Create Views

/services-technologies/how-tos/enterprise-crm-create-views

## **Reports and Dashboards**

#### **Create a Report**

Choose a Report Type

https://help.salesforce.com/HTViewHelpDoc?id=reports builder selecting a report...

Choose a Report Format

https://help.salesforce.com/HTViewHelpDoc?id=reports\_changing\_format.htm&langua...

Create a Report

https://help.salesforce.com/HTViewHelpDoc?id=reports builder create.htm&languag...

## **Work with Report Builder**

Using the Drag and Drop Report Builder

http://na1.salesforce.com/help/pdfs/en/salesforce\_report\_builder\_impl\_guide.pdf Customizing Reports

https://help.salesforce.com/HTViewHelpDoc?id=reports\_builder\_what\_is.htm&langua... Report Fields

https://help.salesforce.com/HTViewHelpDoc?id=reports builder fields.htm&languag...

#### **Work With Your Data**

Group Your Report Data

 $\underline{https://help.salesforce.com/HTViewHelpDoc?id=reports\_builder\_fields\_groupings.h...}$ 

Keep Working While Your Report Preview Loads

https://help.salesforce.com/HTViewHelpDoc?id=reports\_builder\_asych.htm&language...

Summarize Your Report Data

https://help.salesforce.com/HTViewHelpDoc?id=reports\_builder\_fields\_summaries.h...

Work with Formulas in Report Builder

https://help.salesforce.com/HTViewHelpDoc?id=reports builder fields formulas.ht...

Filter Report Data

 $\underline{https://help.salesforce.com/HTViewHelpDoc?id=reports\_builder\_filtering.htm\&lang...}$ 

Getting the Most out of Filter Logic

https://help.salesforce.com/HTViewHelpDoc?id=working\_with\_advanced\_filter\_condi...

Filter Operators

https://help.salesforce.com/HTViewHelpDoc?id=filter\_operators.htm&language=en\_US

Example: Report on Related Objects with Cross Filters

https://help.salesforce.com/HTViewHelpDoc?id=reports\_cross\_filters.htm&language...

#### **Create Dashboards**

Create a Salesforce Classic Dashboard

https://help.salesforce.com/HTViewHelpDoc?id=dashboards\_create.htm&language=en\_...

### **Save Reports**

Save Your Report

https://help.salesforce.com/HTViewHelpDoc?id=reports\_saving.htm&language=en\_US

# **Get Report Notifications**

Subscribe to Get Report Notifications

https://help.salesforce.com/htviewhelpdoc?id=reports\_notifications\_home.htm&sit...