

Self-Help Guide

Recruitment CRM

This Self-Help Guide is intended for Campuses using Prospect Management functionality. Much of the basic navigation is the same and can be easily transferred to using a Contact as opposed to Prospect record but some functionality and fields may be different. Since different business practices will use functionality of the tool in different ways this Self-Help Guide is intended to be an overview of good practice and basic information on navigating and working with Objects and records of different types.

*Items with * may need higher level or manager permissions to access or complete all stated functionality. If you do not see functionality that you think you should have access to check with your internal business processes. There may be a hierarchy of approval you need to engage in order to change your permissions.*

Get Started with Salesforce

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=5

Recruitment CRM Glossary

</services-technologies/how-tos/recruitment-crm-glossary>

Use the Global Search Bar

</services-technologies/how-tos/recruitment-crm-use-global-search-bar>

Review Your Personal Information

Find Your Personal Settings in Salesforce Classic

https://help.salesforce.com/apex/HTViewHelpDoc?id=basics_nav_personal_settings...

Access Don - Our Full Sandbox Environment*

Don - Our Full Sandbox Environment

</services-technologies/how-tos/recruitment-crm-don-our-full-sandbox>

Customize Salesforce

Customize Display Information

Customize Your Pages

https://help.salesforce.com/HTViewHelpDoc?id=user_userdisplay_pages.htm&language=...

Customize Your Tabs

https://help.salesforce.com/HTViewHelpDoc?id=user_userdisplay_tabs.htm&language=...

Set a Default Record Type

</services-technologies/how-tos/recruitment-crm-set-default-record-type>

Customize your Default Tabs

</services-technologies/how-tos/recruitment-crm-customize-your-default>

Customize Views

Create Views

</services-technologies/how-tos/recruitment-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 with Letterhead

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=...

Email Signatures

Create a Rich-Text Email Signature

</services-technologies/how-tos/recruitment-crm-create-rich-text-email>

Create Records

Manually Create Records

Manually Create a Contact

</services-technologies/how-tos/recruitment-crm-manually-create-contact>

Manually Create a Prospect

</services-technologies/how-tos/recruitment-crm-manually-create-prospect>

Manually Create a Bio

</services-technologies/how-tos/recruitment-crm-manually-create-bio>

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&langua...

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...

Submit Internal Cases

Submit New User, Enhancement, and Bug Fix Requests

Create and Manage a Defect Support Case

</services-technologies/how-tos/recruitment-crm-create-manage-defect>

Create and Manage a Duplicate Contacts Case

</services-technologies/how-tos/recruitment-crm-create-manage-duplicate>

Create and Manage an Enhancement/Other Support Case

</services-technologies/how-tos/recruitment-crm-create-manage>

Create and Manage a TC Adm IT Request Case

</services-technologies/how-tos/recruitment-crm-create-manage-tc-adm-it>

Create and Manage a Tier II Support Request Case

</services-technologies/how-tos/recruitment-crm-create-manage-tier-ii>

Verify Enhancements and Fixes

Verify a Case in Don

</services-technologies/how-tos/recruitment-crm-verify-case-in-don>

URLs for Testing Webpages in Don

<https://docs.google.com/a/umn.edu/spreadsheet/ccc?key=0ArgSMOHsyHtjdFE5WUhjRVA5...>

Verify a Case in Production

</services-technologies/how-tos/recruitment-crm-verify-case-in>

Work with Prospects

Recruiters

Recruiting Territories

Manually Create a Recruiting Territory*

</services-technologies/how-tos/recruitment-crm-manually-create>

Manually Update Recruitment Territory Assignments

</services-technologies/how-tos/recruitment-crm-manually-update>

Recruitment Categories

Manually Create a Recruitment Category*

</services-technologies/how-tos/recruitment-crm-manually-create-0>

Manually Add a New Prospect Recruitment Category Assignment

</services-technologies/how-tos/recruitment-crm-manually-add-new>

Customer Relations

Work with Cases

Work with Case Queues

</services-technologies/how-tos/recruitment-crm-work-case-queues>

Manage Cases

</services-technologies/how-tos/recruitment-crm-manage-cases>

Create a Case from a Prospect Record

</services-technologies/how-tos/recruitment-crm-create-case-prospect>

Work with Prospect records

Create a Task

</services-technologies/how-tos/recruitment-crm-create-task>

Add an Appointment

</services-technologies/how-tos/recruitment-crm-add-appointment>

Update Bios Information on a Prospect Record

</services-technologies/how-tos/recruitment-crm-update-bios-information>

Log a Call

</services-technologies/how-tos/recruitment-crm-log-call>

Send an Email from a Prospect Record

</services-technologies/how-tos/recruitment-crm-send-email-prospect>

Use Live Chat

You will need Flash to view these short videos

Make yourself available/unavailable to chat (1m 17s)

<http://screencast.com/t/j6Qyx5VHi>

Chat with a student (1m 33s)

<http://screencast.com/t/Ajdicale>

End a chat and see it logged (1m 34s)

<http://screencast.com/t/3J3IjGqMC>

Work with Knowledge Articles

Salesforce Knowledge Documentation Overview

https://help.salesforce.com/articleView?id=knowledge_map.htm&type=5

Create and Editing Articles*

https://help.salesforce.com/HTViewHelpDoc?id=knowledge_article_create.htm&langu...

Publish Articles and Translations*

https://help.salesforce.com/apex/HTViewHelpDoc?id=knowledge_article_publish.htm...

Work with Articles and Translations*

https://help.salesforce.com/apex/HTViewHelpDoc?id=knowledge_article_manage.htm&...

Use the Summary Field in Knowledge Articles to Make Articles Easily Searchable*

</services-technologies/how-tos/recruitment-crm-use-summary-field-in>

Manage Inquiries

Manage Inquiries

</services-technologies/how-tos/recruitment-crm-manage-inquiries>

Events and Visits

Work with Events*

Create a New Visit or Event

</services-technologies/how-tos/recruitment-crm-create-new-visit-or>

Create an Event Location

</services-technologies/how-tos/recruitment-crm-create-event-location>

Create an Event Category

</services-technologies/how-tos/recruitment-crm-create-event-category>

Clone a Visit Option

</services-technologies/how-tos/recruitment-crm-clone-visit-option>

Create an Event from a Prospect Record

Create an Event or Visit from a Prospect Record

</services-technologies/how-tos/recruitment-crm-create-event-or-visit>

Work with Event Attendees

Review Requested Events or Visits

</services-technologies/how-tos/recruitment-crm-review-requested-events>

Schedule Staff for Events or Visits

</services-technologies/how-tos/recruitment-crm-schedule-staff-events-or>

Manage Scheduled Event Sessions

</services-technologies/how-tos/recruitment-crm-manage-scheduled-event>

Email Event Attendees

</services-technologies/how-tos/recruitment-crm-email-event-attendees>

Update Message Status dates for Events or Visits

</services-technologies/how-tos/recruitment-crm-update-message-status>

Update Event or Visit Attendance Status

</services-technologies/how-tos/recruitment-crm-update-event-or-visit>

Campaigns

Get Ready for your Campaign

Create a Query

</services-technologies/how-tos/recruitment-crm-create-query>

Create a Caller Group

</services-technologies/how-tos/recruitment-crm-create-caller-group>

Add Members to a Caller Group

</services-technologies/how-tos/recruitment-crm-add-members-caller-group>

Create Scripts

</services-technologies/how-tos/recruitment-crm-create-scripts>

Clone a Query

</services-technologies/how-tos/recruitment-crm-clone-query>

Set Up an Outbound Calling Campaign*

Create a New Outbound Calling Campaign

</services-technologies/how-tos/recruitment-crm-create-new-outbound>

Modify Member Status Values

</services-technologies/how-tos/recruitment-crm-modify-member-status>

Add a Query to a Campaign

</services-technologies/how-tos/recruitment-crm-add-query-campaign>

Add a Caller Group to a Campaign

</services-technologies/how-tos/recruitment-crm-add-caller-group>

Add a Script to a Campaign

</services-technologies/how-tos/recruitment-crm-add-script-campaign>

Clone a Campaign

</services-technologies/how-tos/recruitment-crm-clone-campaign>

Get and Manage Campaign Members*

Add Campaign Prospect Members with Refresh

</services-technologies/how-tos/recruitment-crm-add-campaign-prospect>

Check on the Prospect Member Refresh Status

</services-technologies/how-tos/recruitment-crm-check-prospect-member>

Manage a Campaign Call List

</services-technologies/how-tos/recruitment-crm-manage-campaign-call>

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

Attach an Email to a Prospect record with Cirrus (2m 6s)

<http://screencast.com/t/AYFkdgRJsv>

Silverpop

Silverpop Training Portal*

<https://portal.silverpop.com/Portal/www/login.php>

Silverpop Fields of Interest in CRM

</services-technologies/how-tos/recruitment-crm-silverpop-fields>

Silverpop Opt Out process

<https://docs.google.com/a/umn.edu/document/d/1G02Acu5c7K7Y6l8zxfcB6ygWjmJfM2Pel...>

Work with Reports and Data

Reference Documents

Contact and Prospect Field Sources

Contact Definitions and Sources

</services-technologies/how-tos/recruitment-crm-contact-definitions>

Prospect Definitions and Sources

</services-technologies/how-tos/recruitment-crm-prospect-definitions>

Term Definitions Documentation

Recruitment CRM: Glossary

</services-technologies/how-tos/recruitment-crm-glossary>

List Views

Create Customized List Views

Create Views

</services-technologies/how-tos/recruitment-crm-create-views>

Manipulate Data Directly from Lists

Update Records Inline from a List View in Lightning Experience

https://help.salesforce.com/articleView?id=customviews_edit_inline_listview_lex...

Reports

Understand and Navigate Reports in UMN CRM

Understand and Navigate Reports in UMN CRM

</services-technologies/how-tos/recruitment-crm-understand-navigate>

Create a Report

Choose a Report Type

https://help.salesforce.com/HTViewHelpDoc?id=reports_builder_selecting_a_report...

Recruitment CRM Custom Report Types

<https://docs.google.com/a/umn.edu/spreadsheets/d/1aRN88mjbUDo4PFosJpTFtDayzatzh...>

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...

Use the Assigned to Current User Field to Create Dynamic Reports

</services-technologies/how-tos/recruitment-crm-use-assigned-current>

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&language...

Report Fields

https://help.salesforce.com/HTViewHelpDoc?id=reports_builder_fields.htm&language...

Work With Your Data

Group Your Report Data

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_asynch.htm&language...

Summarize Your Report Data

https://help.salesforce.com/HTViewHelpDoc?id=reports_builder_fields_summaries.h...

Work with Formulas in Reports

https://help.salesforce.com/HTViewHelpDoc?id=reports_builder_fields_formulas.ht...

Filter Report Data

https://help.salesforce.com/HTViewHelpDoc?id=reports_builder_filtering.htm&lang...

Filter Operators Reference

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...

Data Upload Templates

Use Templates for Data Uploads*

Use Templates for Data Uploads

</services-technologies/how-tos/recruitment-crm-use-templates-data>