

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

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...

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

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&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...

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>

Verify a Case in Production

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

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

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 Report Builder

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...

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...