University of Minnesota

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&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
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

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_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
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…