

## **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...](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](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](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...](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...](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...](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...](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...](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...](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...](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...](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...](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...](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...](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...](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...](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](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...](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...](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...](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...](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...](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...](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...](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...](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](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...](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 ...](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](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...](https://help.salesforce.com/htviewhelpdoc?id=reports_notifications_home.htm&sit...)