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

Basic Navigation

Navigate Salesforce Tabs
Tips for New Users

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&language=...  
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
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_template...

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

**Communicate with Others Using Chatter**

Post Visibility
Replieding to Chatter Email Notifications
@Mention People and Groups in Posts and Comments

**Use Chatter on records**

Follow Records
Viewing Record Feeds

**Chatter Groups**

Chatter Groups

**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
Create and Manage a TC Adm IT Request Case
Create and Manage a Tier II Support Request Case
Verify Enhancements and Fixes
Verify a Case in Don
URLs for Testing Webpages in Don
Verify a Case in Production
Work with Prospects
Recruiters
Recruiting Territories
Manually Create a Recruiting Territory*
Manually Update Recruitment Territory Assignments
Recruitment Categories
Manually Create a Recruitment Category*
Manually Add a New Prospect Recruitment Category Assignment
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/AjdicaIe

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...
Work with Articles and Translations*
https://help.salesforce.com/apex/HTViewHelpDoc?id=knowledge_article_publish.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](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](http://screencast.com/t/AYFkdgRJsv)

**Silverpop**

Silverpop Training Portal*
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/1G02Acu5c7K7Y6l8zxfcB6ygWjmJfM2PeI...](https://docs.google.com/a/umn.edu/document/d/1G02Acu5c7K7Y6l8zxfcB6ygWjmJfM2PeI...)

**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
**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


Customizing Reports


Report Fields


Work With Your Data

Group Your Report Data


Keep Working While Your Report Preview Loads


Summarize Your Report Data


Work with Formulas in Reports


Filter Report Data


Filter Operators Reference


Example: Report on Related Objects with Cross Filters


Create Dashboards*

Create a Salesforce Classic Dashboard


Save Reports

Save Your Report


Get Report Notifications
Data Upload Templates

Use Templates for Data Uploads*

Use Templates for Data Uploads
/services-technologies/how-tos/recruitment-crm-use-templates-data