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
Tip for New Users

Use the Global Search Bar

Review Your Personal Information

Find Your Personal Settings in Salesforce Classic

Access Don - Our Full Sandbox Environment*

Customize Salesforce

Customize Display Information

Customize Your Pages

Set a Default Record Type

Customize Views

Create Views

Create Email Templates
Merge Fields*

Merge Fields Overview

Considerations for Using Merge Fields in Email Templates
https://help.salesforce.com/HTViewHelpDoc?id=merge_fields_email_templates.htm&langua...

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_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...
Replaying 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...

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
https://docs.google.com/a/umn.edu/spreadsheet/ccc?key=0ArgSMOHsyHtJdFE5WUhjRVA5...
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/Ajdicale

End a chat and see it logged (1m 34s)
http://screencast.com/t/3J3ljiGqMC

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*
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
Update Message Status dates for Events or Visits

Update Event or Visit Attendance Status

Campaigns

Get Ready for your Campaign

Create a Query

Create a Caller Group

Add Members to a Caller Group

Create Scripts

Clone a Query

Set Up an Outbound Calling Campaign*

Create a New Outbound Calling Campaign

Modify Member Status Values

Add a Query to a Campaign

Add a Caller Group to a Campaign

Add a Script to a Campaign

Clone a 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*
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/1G02Acu5c7K7Y6I8zxfcB6ygWjmJfM2Pel...

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/1aRN88mjbUDo4PFosJpTFTdTdayzatzh...

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