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
**Review Your Personal Information**

Find Your Personal Settings in Salesforce Classic

**Access Don - Our Full Sandbox Environment**

Don - Our Full Sandbox Environment
[services-technologies/how-tos/recruitment-crm-don-our-full-sandbox](services-technologies/how-tos/recruitment-crm-don-our-full-sandbox)

**Customize Salesforce**

**Customize Display Information**

Customize Your Pages

Customize Your Tabs

Set a Default Record Type
[services-technologies/how-tos/recruitment-crm-set-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](services-technologies/how-tos/recruitment-crm-customize-your-default)

**Customize Views**

Create Views
[services-technologies/how-tos/recruitment-crm-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&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 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...
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...

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
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=0ArgSMOHsyHtjdFE5WUjhRVA5...
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/3J3ljGqMC

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*
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/1G02Acu5c7K7Y6l8zxfcB6ygWjmJfM2Pel...

**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/1aRN88mjbUDo4PFosJpTFtDayzatzh...
Choose a Report Format
https://help.salesforce.com/HTViewHelpDoc?id=reports_changing_format.htm&languag...
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