University of Minnesota

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

Use the Global Search Bar

Review Your Personal Information

Find Your Personal Settings in Salesforce Classic

Access Don - Our Full Sandbox Environment*

Don - Our Full Sandbox Environment

Customize Salesforce

Customize Display Information

Customize Your Pages

Customize Your Tabs

Set a Default Record Type

Customize your Default Tabs

Customize Views

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
https://help.salesforce.com/HTViewHelpDoc?id=creating_html_emailTemplates.htm&...  
Create Text Email Templates
https://help.salesforce.com/HTViewHelpDoc?id=creating_text_emailTemplates.htm&...  
Create Custom HTML Email Templates
https://help.salesforce.com/HTViewHelpDoc?id=creating_custom_html_emailTemplates...  

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
/services-technologies/how-tos/recruitment-crm-verify-case-in-don

URLs for Testing Webpages in Don
https://docs.google.com/a/umn.edu/spreadsheet/ccc?key=0ArgSMOHsyHtdFE5WUhjRVA5...

Verify a Case in Production
/services-technologies/how-tos/recruitment-crm-verify-case-in

Work with Prospects

Recruiters

Recruiting Territories

Manually Create a Recruiting Territory*
/services-technologies/how-tos/recruitment-crm-manually-create

Manually Update Recruitment Territory Assignments
/services-technologies/how-tos/recruitment-crm-manually-update

Recruitment Categories

Manually Create a Recruitment Category*
/services-technologies/how-tos/recruitment-crm-manually-create-0

Manually Add a New Prospect Recruitment Category Assignment
/services-technologies/how-tos/recruitment-crm-manually-add-new

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...

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/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/1aRN88mbUDo4PFosJpTFTdayzatzh...
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