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 <u>https://help.salesforce.com/apex/HTViewHelpDoc?id=basics_intro_logging_in.htm&l...</u> Troubleshoot Login Issues <u>https://help.salesforce.com/HTViewHelpDoc?id=getstart_login.htm&language=en_US</u>

Basic Navigation

Navigate Salesforce Tabs

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... 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&languag... 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 <u>https://help.salesforce.com/apex/HTViewHelpDoc?id=valid_merge_fields.htm&langua...</u> Considerations for Using Merge Fields in Email Templates <u>https://help.salesforce.com/HTViewHelpDoc?id=merge_fields_email_templates.htm&l...</u>

Create Different Types of Email Templates*

Create HTML Email Templates with Letterhead 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=...

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 <u>https://help.salesforce.com/apex/HTViewHelpDoc?id=collab_post_visibility.htm&la...</u> Replying to Chatter Email Notifications <u>https://help.salesforce.com/apex/HTViewHelpDoc?id=collab_email_reply.htm&langua...</u> @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 <u>https://help.salesforce.com/HTViewHelpDoc?id=collab_following_records.htm&langu...</u> Viewing Record Feeds <u>https://help.salesforce.com/apex/HTViewHelpDoc?id=collab_viewing_record_updates...</u>

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 <u>/services-technologies/how-tos/recruitment-crm-create-manage</u> Create and Manage a TC Adm IT Request Case <u>/services-technologies/how-tos/recruitment-crm-create-manage-tc-adm-it</u> Create and Manage a Tier II Support Request Case <u>/services-technologies/how-tos/recruitment-crm-create-manage-tier-ii</u>

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=0ArgSMOHsyHtJdFE5WUhjRVA5... 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/Ajdicale End a chat and see it logged (1m 34s) http://screencast.com/t/3J3IjGqMC

Work with Knowledge Articles

Salesforce Knowledge Documentation Overview <u>https://help.salesforce.com/articleView?id=knowledge_map.htm&type=5</u> Create and Editing Articles* <u>https://help.salesforce.com/HTViewHelpDoc?id=knowledge_article_create.htm&langu...</u> Publish Articles and Translations* https://help.salesforce.com/apex/HTViewHelpDoc?id=knowledge_article_publish.htm... Work with Articles and Translations* https://help.salesforce.com/apex/HTViewHelpDoc?id=knowledge_article_manage.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 <u>https://www.cirrusinsight.com/tutorials</u> This leads to a Cirrus page with relevant Salesforce Tutorial Links Attach an Email to a Prospect record with Cirrus (2m 6s) <u>http://screencast.com/t/AYFkdgRJsv</u>

Silverpop

Silverpop Training Portal* <u>https://portal.silverpop.com/Portal/www/login.php</u> Silverpop Fields of Interest in CRM <u>/services-technologies/how-tos/recruitment-crm-silverpop-fields</u> Silverpop Opt Out process <u>https://docs.google.com/a/umn.edu/document/d/1G02Acu5c7K7Y6I8zxfcB6ygWjmJfM2Pel...</u>

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&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 <u>http://na1.salesforce.com/help/pdfs/en/salesforce_report_builder_impl_guide.pdf</u> Customizing Reports <u>https://help.salesforce.com/HTViewHelpDoc?id=reports_builder_what_is.htm&langua...</u> Report Fields 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... Keep Working While Your Report Preview Loads https://help.salesforce.com/HTViewHelpDoc?id=reports_builder_asych.htm&language... Summarize Your Report Data https://help.salesforce.com/HTViewHelpDoc?id=reports_builder_fields_summaries.h... Work with Formulas in Reports 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... Filter Operators Reference 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...

Create Dashboards*

Create a Salesforce Classic Dashboard 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

Get Report Notifications

Subscribe to Get Report Notifications https://help.salesforce.com/htviewhelpdoc?id=reports_notifications_home.htm&sit...

Data Upload Templates

Use Templates for Data Uploads*

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