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
https://help.salesforce.com/HTViewHelpDoc?id=getstart_login.htm&language=en_US

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
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
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
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

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

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/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*

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
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*
https://portal.silverpop.com/Portal/www/login.php
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/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
http://na1.salesforce.com/help/pdfs/en/salesforce_report_builder_impl_guide.pdf
Customizing Reports
https://help.salesforce.com/HTViewHelpDoc?id=reports_builder_what_is.htm&langua…
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