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Self-Help Guide

Enterprise CRM Service Console

This Self-Help Guide is intended for departments using the Service Console functionality within Enterprise CRM. 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 Case Management.

If your department has added different Objects or other functionality beyond Cases and Contacts for you to use you may find additional information in the Enterprise CRM Self-Help Guide for information on Objects not covered here.

*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

Salesforce Login Emails
/services-technologies/how-tos/enterprise-crm-service-console
Logging In and Timing Out
/services-technologies/how-tos/enterprise-crm-service-console-logging

Basic Navigation

Navigate the Service Console
/services-technologies/how-tos/enterprise-crm-service-console-navigate
Queues, Views, and Reports
/services-technologies/how-tos/enterprise-crm-service-console-queues
Create Views
/services-technologies/how-tos/enterprise-crm-service-console-create-5

Update Your Personal Information

Set Your Outbound Email Address and Signature
/services-technologies/how-tos/enterprise-crm-service-console-set-your
Finding Your Personal Settings
https://help.salesforce.com/apex/HTViewHelpDoc?id=basics_nav_personal_settings…

Access Martin - Our Full Sandbox Environment*

Martin - Our Full Sandbox Environment*
/services-technologies/how-tos/enterprise-crm-access-martin-our-full

Create Email Templates

Merge Fields

Merge Fields for Email Templates
https://help.salesforce.com/HTViewHelpDoc?id=merge_fields_email_templates.htm&l…

Create Different Types of Email Templates

Creating HTML Email Templates (using Letterhead)
https://help.salesforce.com/HTViewHelpDoc?id=creating_html_email_templates.htm&…
Creating Text Email Templates
https://help.salesforce.com/HTViewHelpDoc?id=creating_text_email_templates.htm&…
Creating Custom HTML Templates (without Letterhead)
https://help.salesforce.com/HTViewHelpDoc?id=creating_custom_html_email_templat…

Manage Email Templates

Managing Email Templates
https://help.salesforce.com/HTViewHelpDoc?id=admin_emailtemplates.htm&language=…

Use Chatter

Set up Your Chatter Profile

Setting 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…
Mentioning People and Groups in Posts and Comments
https://help.salesforce.com/apex/HTViewHelpDoc?id=collab_add_mentioning_people…

Use Chatter on Records

Following 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 Overview
https://help.salesforce.com/apex/HTViewHelpDoc?id=collab_group_about.htm&langua…

Submit Internal Cases

Submit New User, Enhancement, and Bug Fix Requests

Create an Internal Support Case
/services-technologies/how-tos/enterprise-crm-service-console-create-4

Verify Enhancements and Fixes

Verify a Case in Martin
/services-technologies/how-tos/enterprise-crm-verify-case-in-martin
Verify a Case in Production
/services-technologies/how-tos/enterprise-crm-verify-case-in-production

Work with Cases

Work with Contacts

Get Information from Peoplesoft

Create or Update a Contact Record in Salesforce from Peoplesoft
/services-technologies/how-tos/enterprise-crm-service-console-create-or

Work with Salesforce Contacts

Check for Existing or Duplicate Records
/services-technologies/how-tos/enterprise-crm-service-console-search
Create a Contact
/services-technologies/how-tos/enterprise-crm-service-console-create-0

Create Cases

Create Using Find Contacts (preferred)

Create a New Case Using Find Contacts
/services-technologies/how-tos/enterprise-crm-service-console-create-2

Create from a Contact record

Create a Case from a Contact record
/services-technologies/how-tos/enterprise-crm-service-console-create

Manage Cases

Manage Cases from Queues

Manage Cases from Queues
/services-technologies/how-tos/enterprise-crm-service-console-manage-0

Communicate with Cases

Send an email from a Case
/services-technologies/how-tos/enterprise-crm-service-console-send
Create a Task from a Case
/services-technologies/how-tos/enterprise-crm-service-console-create-3

Transfer Cases

Transfer Cases
/services-technologies/how-tos/enterprise-crm-service-console-transfer
Update Case Record Types
/services-technologies/how-tos/enterprise-crm-service-console-update

Close Cases

Close a Case
/services-technologies/how-tos/enterprise-crm-service-console-close

Manage Walk-in Locations*

Setup Walk-in Locations and Counters

Setup Walk-in Locations and Counters
/services-technologies/how-tos/enterprise-crm-service-console-setup

Walk-in Case Management

Walk-in Case Management
/services-technologies/how-tos/enterprise-crm-service-console-walk-in

Manage Round Robin Assignments*

Work with Assignment Groups

Create a New Assignment Group
/services-technologies/how-tos/enterprise-crm-service-console-create-1
Manage Assignment Group Members
/services-technologies/how-tos/enterprise-crm-service-console-manage

Manage Round Robin Assignments

Manage Round Robin Assignments
/services-technologies/how-tos/enterprise-crm-service-console-manage-1

Work with Reports and Data

Understand Queues, List Views, and Reports

Queues, Views, and Reports

Queues, Views, and Reports
/services-technologies/how-tos/enterprise-crm-service-console-queues

List Views

Create Customized List Views

Create Views
/services-technologies/how-tos/enterprise-crm-service-console-create-5

Reports and Dashboards

Create a Report

Choose a Report Type
https://help.salesforce.com/HTViewHelpDoc?id=reports_builder_selecting_a_report…
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…

Work with Report Builder

Using the Drag and Drop Report Builder
http://na1.salesforce.com/help/pdfs/en/salesforce_report_builder_impl_guide.pdf
The Report Builder Screen
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 Report Builder
https://help.salesforce.com/HTViewHelpDoc?id=reports_builder_fields_formulas.ht…
Filter Your Report Data
https://help.salesforce.com/HTViewHelpDoc?id=reports_builder_filtering.htm&lang…
Getting the Most out of Filter Logic
https://help.salesforce.com/HTViewHelpDoc?id=working_with_advanced_filter_condi…
Filter Operators
https://help.salesforce.com/HTViewHelpDoc?id=filter_operators.htm&language=en_US
Report on Related Objects with Cross Filters
https://help.salesforce.com/HTViewHelpDoc?id=reports_cross_filters.htm&language…

Create Dashboards

Create a 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

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