New Employee Checklist

This document outlines training requirements and general setup required of a new employee to a department within Procurement Services to gain access to Salesforce/CRM.

CRM is the tool Procurement uses to manage requests submitted via the Support Form as well as BUY.IU Comments.

1. Complete required training.
    a. To gain access to Salesforce/CRM the following trainings must be completed:
        i. FERPA Tutorial (20 minutes): https://ferpa.iu.edu/
        ii. Acceptable Use Agreement (5 minutes): https://one.iu.edu/task/iu/acceptable-use-agreement
    b. Notify your supervisor when you have completed these trainings so they may request CRM access on your behalf.
2. Favorite the CRM task tile.
    a. Favorite the CRM task tile in One.IU by clicking the heart icon. Access the task tile here: https://one.iu.edu/task/iu/salesforce
3. Review training documentation.
    a. Visit the CRM Documentation page for video and written documentation explaining different processes within your department: https://training.iu.edu/documentation/internal/crm.html
    b. Bookmark this page! You'll be coming back to it 😊
4. Set Outlook rules.
    a. In your personal Outlook inbox, setup a rule so that system notifications from CRM will be funneled into a folder. Instructions here: https://training.iu.edu/documentation/internal/crm-pdf/outlook-rules-comments.pdf
5. Customize CRM.
    a. Update your default email signature: https://training.iu.edu/documentation/internal/crm-pdf/default-email-signature.pdf
    b. Create a list view of cases assigned to you:
        i. https://training.iu.edu/documentation/internal/crm-pdf/create-list-view.pdf