

SYENSQO Salesforce CRM

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WELCOME to the Wiki page of our group-wide Customer Relationship Management solution! This is the place to find all relevant documentation and information through our User Guide, FAQ and Glossary. Learn more about your CRM solution and help support the goal of being customer-centric.



USER GUIDE

You can find here the description of the 13 processes in the CRM system and the detailed functionalities, explained step by step, such as 'how to create a prospect, how to create a contact', etc.

> Click [here](#) to open ALL the guides by process.

> Click [here](#) to go to the CRM Analytics dashboard guide.

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ONBOARDING

In this section you will find all the material related to the onboarding of new CRM users.

> Click [here](#) to watch the CRM Onboarding Training Video.

> Click [here](#) to access the CRM Onboarding Training Presentation.



RECENT DOCUMENTS

Here you will find the most recent information about your CRM and all the helpful links you need to know:

- [How to upload files with a Chrome book](#) - Jun 2021
- [Sample Simplified process training](#) - Nov 2019
- [Mobile App user experience improvement](#) - Feb 2020
- [Lead Management training](#) - Fall 2018
- [Gmail for Lightning training](#) - Fall 2018
- [Mobility training](#) - Fall 2018
- [Video tutorials for Lightning](#) - Summer 2018
- [Lightning training kit](#) - Summer 2018

TIPS & TRICKS

In this section you will find the newest Tips & Tricks for the Lightning CRM, with screenshots and important reminders.

How to log a support request for CRM in Service one ? [click here](#)

> Click [here](#) to open the full presentation OR see by Topic:

- [Home Page](#)
- [Home Page and List Views Best Practices](#)
- [Global search](#)
- [Global Search Einstein](#)
- [Favorites \(any object\)](#)
- [Pin & unpin list views / Use Wrap text](#)
- [Log in & Reports : common errors](#)
- [Chatter - Follow button](#)
- [Chatter - Out of Office message](#)
- [Chatter Tab - How to use **NEW**](#)
- [Chatter - Setting notifications **NEW**](#)
- [Teams \(Accounts & Cases\)](#)
- [Visit Preparation Report](#)
- [360° Customer Views](#)
- [Cases - Customer Requests](#)
- [Cases - Complaints](#)
- [Cases - Samples](#)
- [Gmail for Lightning - Troubleshooting](#)
- [Gmail for Lightning - Log emails - Attachments](#)
- [Create / Modify an email template](#)
- [Insert / Use an email template](#)
- [Printable view : Visit report - Complaint - Sample](#)
- [Approval Delegation](#)
- [Contact email address mandatory / Duplicate](#)
- [List views : Edit Mode - Kanban \(Summer 2020\)](#)
- [Upload files with a Chromebook June 2021](#)



GBU CORNER

This section offers a space dedicated to your GBU, where you can find your latest GBU specific materials, who's who in your GBU CRM Team, etc.

> Click [here](#) to see all corners OR choose your GBU:

- [GBU Aroma Performance](#)
- [GBU Novicare](#)
- [GBU Technology Solutions](#)
- [CRM - Oil & Gas](#)
- [SCP commercial Network](#)



USEFUL DOCUMENTS

Authorization/access to CRM Sales Force

All access requests for CRM must be validated by Line manager OR by **GBU CRM Champion** :

- Need **access to core CRM** - Service One Application Access Request (generic) click [HERE](#)
- For any change of CRM access contact your CRM Champion / Data Steward listed in [GBU Corner](#) section.

Compliance information

- [Antitrust guidance Market Intelligence Gathering](#)

Release Notes

- Go to [Release Notes details](#) section

Tutorial videos

- [How to create reports in CRM \(~4 mins\)](#)
- [Advanced use of filters in reports \(~4 mins\)](#)
- [Advanced use of Cross filters in reports \(~4 mins\)](#)
- [How to create list views \(~4 mins\)](#)
- [How to use Gmail to Salesforce integration \(~ 7mins\)](#)
- [Integration with Gmail: how to install?](#)
- [Account & Contact Management](#)
- [Opportunity Management](#)
- [360° Customer view](#)

Trainer Toolkit

- [Onboarding training \(Lightning\)](#)
- [Training tips & tricks](#)
- [Generic training materials \(updated to Winter Release \(7.0\)\)](#)
- [CRM Chatter Guide](#)

Mobile documentation

- [Mobile App user experience improvement - Feb 2020](#)