

Process Manual
Logging into CBMS Salesforce

Overview

This document provides a step-by-step process for how to log in to the different CBMS Salesforce environments. Chrome icons for Production, TRN and UPA were unable to be created on the CDHS Portal, so instead you will need to bookmark the URL Links for each environment. CBMS Salesforce will only work in Google Chrome, not in IE or Firefox.

Process for Logging into Salesforce

- 1) Open a **Google Chrome** browser.
- 2) Enter the appropriate **URL** in the search bar.
 - **Production (PRD)** - <https://cees.my.salesforce.com/>

This environment is live production. Anything you enter in this environment should be actual cases and eligibility will be determined on actual customers.

- **User Practice Area (UPA)** – <https://cees--upa2.my.salesforce.com/>

This environment is used as a practice area. A user can enter cases in this environment to practice data entry. County Security Administrators can allow access to this environment. MA sites will not have access to the UPA environment until they have completed the assessments.

- **Training (TRN)** - <https://cees--trn.my.salesforce.com/>

(You must click the 'Ping Federate_TRN' button first before logging in.)

This environment is used as a training tool. A user can enter cases in this environment to practice data entry. Eligibility Sites with Certified Trainers have specific username and passwords for this environment.

- 3) Log in using your assigned CBMS Username and Password.

Note: Users are encouraged to bookmark the URLs for each environment. Follow the below process for how to bookmark.

Process to Bookmark the URL

- 1) Open a **Google Chrome** browser
- 2) From the three dots in the top right corner, select **Bookmarks**
- 3) Click on **Bookmark Manager** (or Ctrl+Shift+O)
- 4) From the three dots on the blue bar, select **Add new bookmark**
- 5) Type the **Name** of the Bookmark as you want it to show (CBMS UPA, CBMS TRN, etc.)
- 6) Type the hyperlink in the **URL** field
- 7) Click **Save**
- 8) Repeat these steps for each URL you want to bookmark.

Do you have any questions or suggestions regarding this process? Please contact the SDC via email SOC_StaffDevelopment@state.co.us

