CPPA PERSPAY eCRM User Guide v 2.5

Effective Date: July 20, 2022

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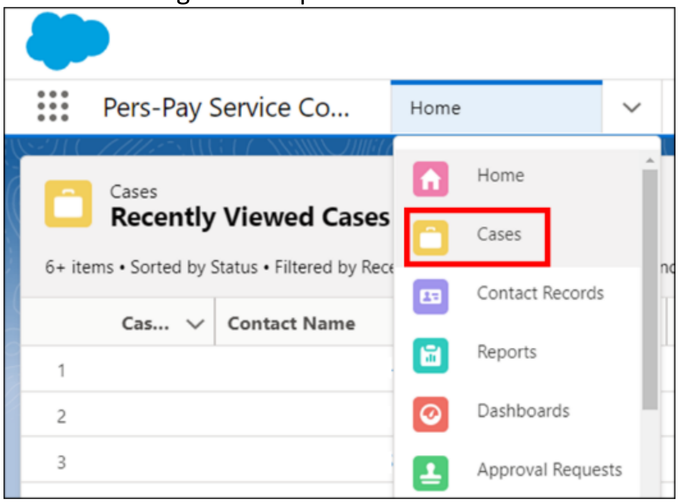
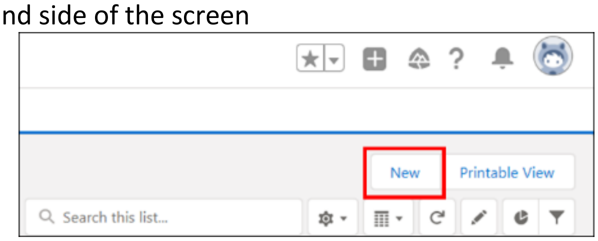
CREATION OF CASE

Salesforce URL: https://navynpc.my.salesforce.mil/
NOTE: You must use Chrome or Edge – no Internet Explorer

Step 1: Navigate to “Cases” page from the navigation drop down-LIGHTNING EXPERIENCE MUST BE USED.

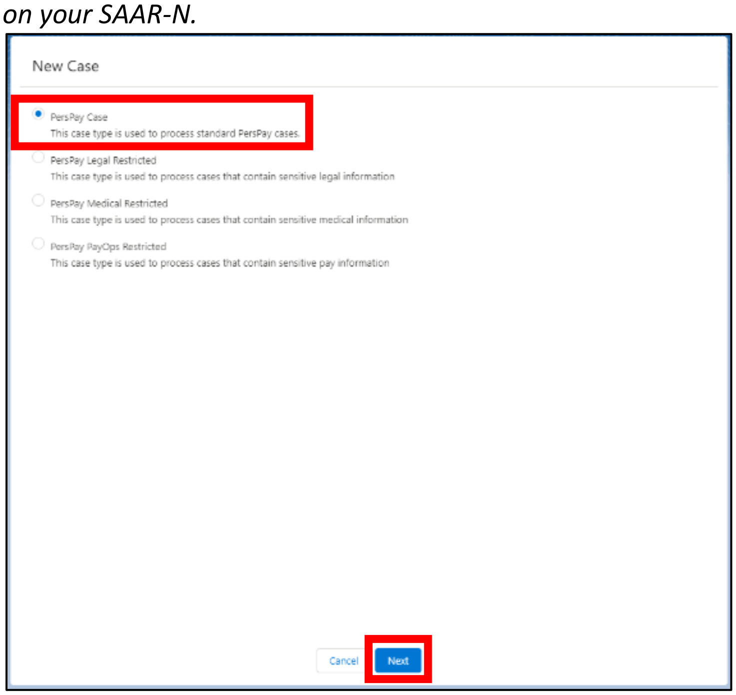


Step 2: Click “New” on the right-hand side of the screen



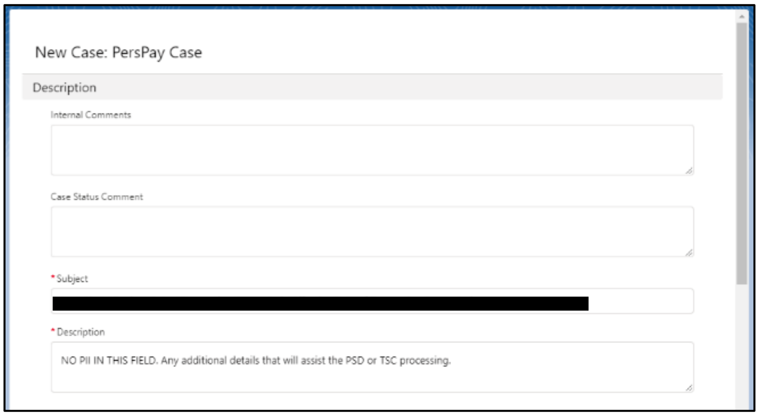
Step 3: Select “PersPay Case” and Click “Next”

NOTE: If you do not see this screen that is okay! It has automatically selected “PersPay Case” for you based on your requested accesses on your SAAR. *You will only see the restricted case options if you have requested these additional case types on your SAAR-N.*

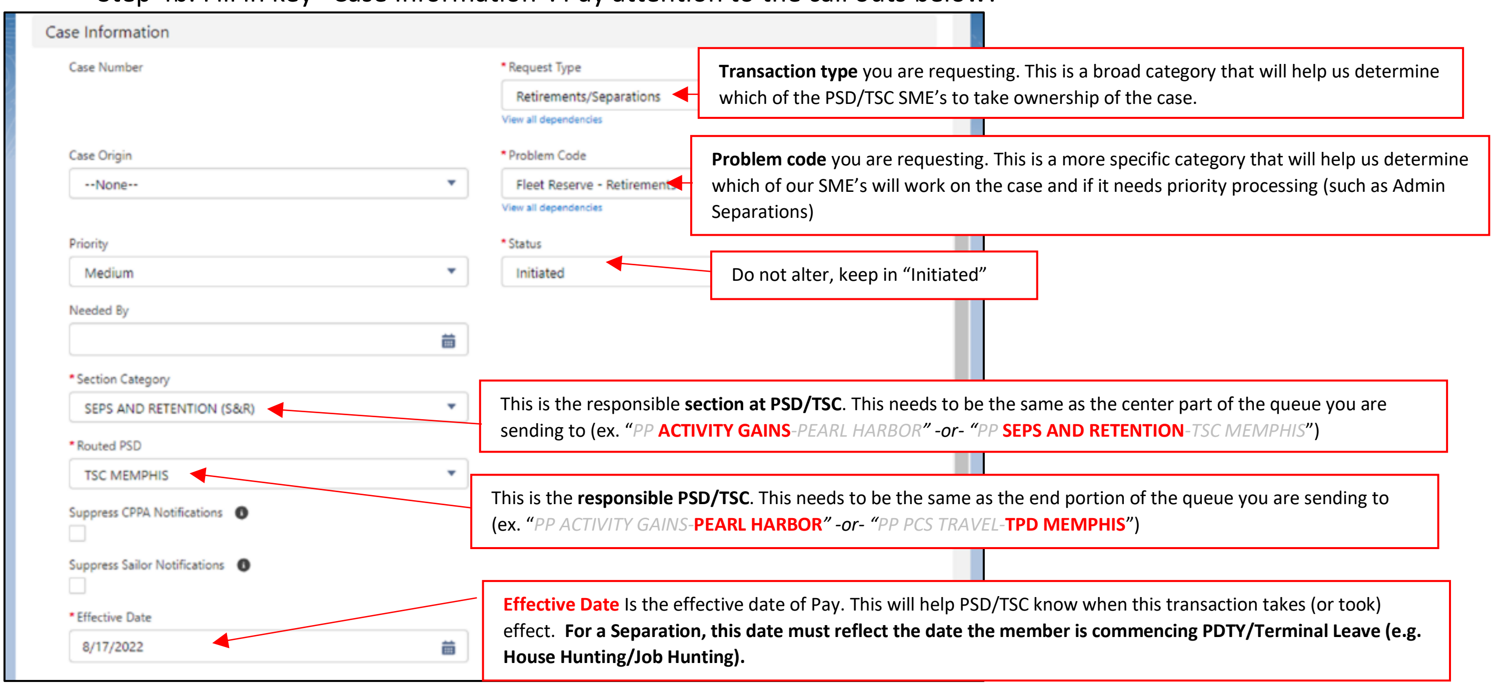


Step 4: Fill in case details

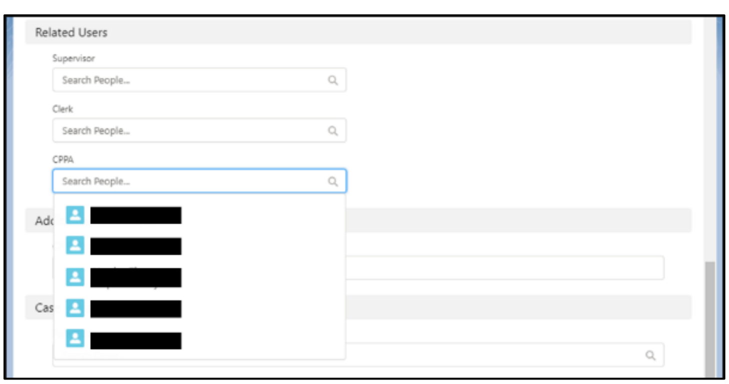
- Step 4a: Add “Subject” line in the below format. Add “Description”. If you need to communicate PII, input into “Internal Comments”
    - Subject Line: LAST FIRST
        - Ex. 1: SMITH JOHN
        - Ex. 2: JONES JANE
        - *!!Note!! This is different from TOPS, because DODID for the Sailor will be in the Contact Name/Sailor Record and the type of work will be captured in the Case Type/Problem Code!!*



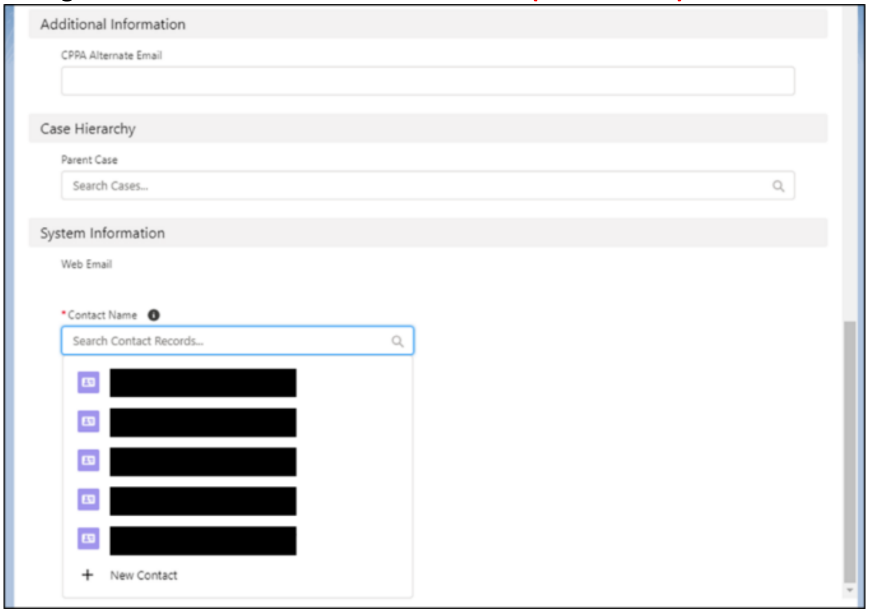
- Step 4b: Fill in key “Case Information”. Pay attention to the call outs below!



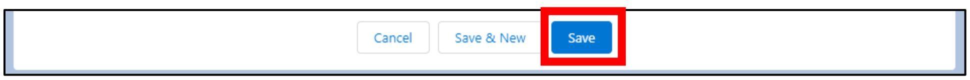
- Step 4c: Your name will auto-populate after you have saved the case. If your name does not automatically populate in the “CPPA” field under “Related Users” search for yourself (format: First Last) and select your profile.



- Step 4d: Search for and add the "Contact Record" for the **SAILOR** you are requesting work for. All records can be found by searching First Middle Last. **DO NOT PUT YOUR (*THE CPPA's*) CONTACT RECORD!**

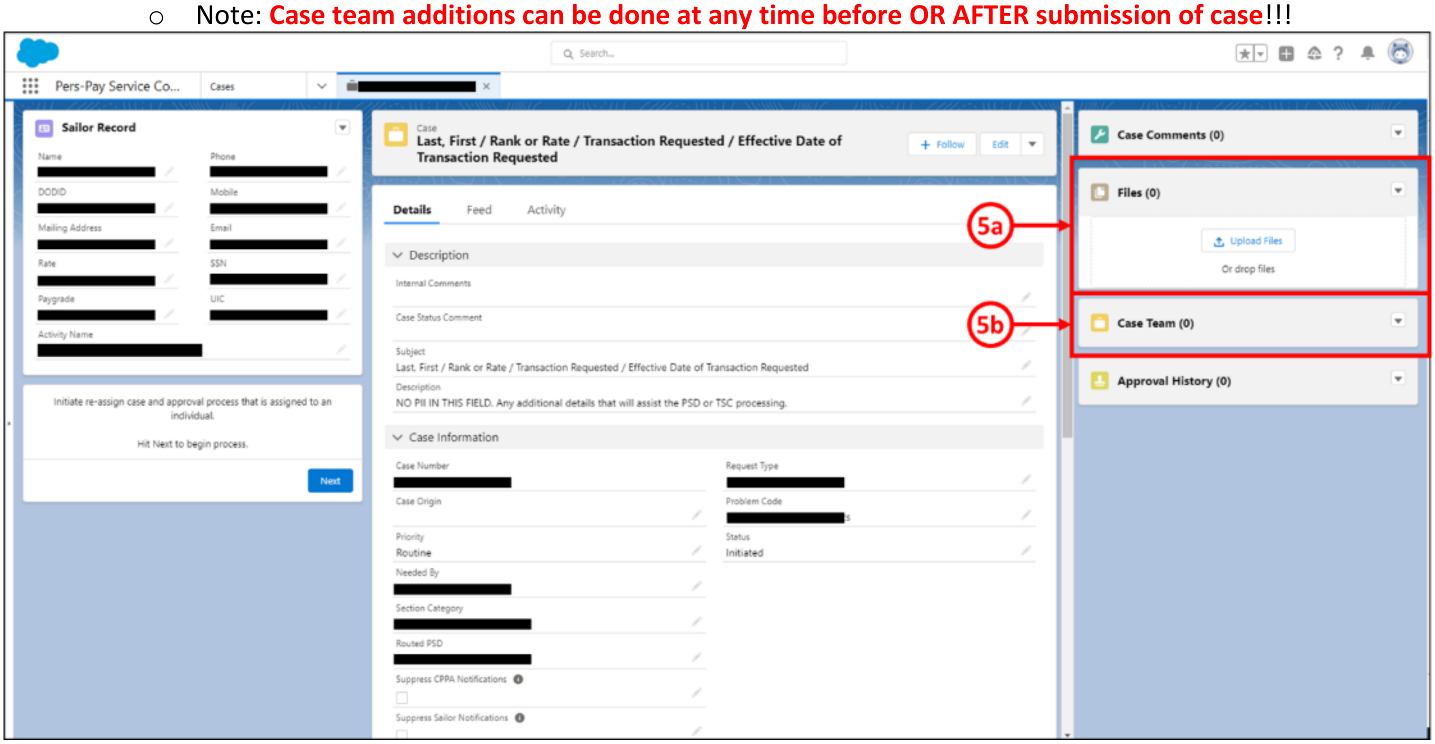


- Step 4e: Click "Save"



Step 5: Finish case set up

- Step 5a: Add key supporting documents under "Files"
  - SAVE FILES UNDER THIS NAMING CONVENTION: LAST FIRST DODID# REQUEST TYPE
  - Note: **Files can be added at any time before OR AFTER submission of case**!!!
- Step 5b: Ensure you and the CPPA's at your command are added to the "Case Team" (how to do this is in next section) in order to have visibility of the case.
  - Note: **Case team additions can be done at any time before OR AFTER submission of case**!!!

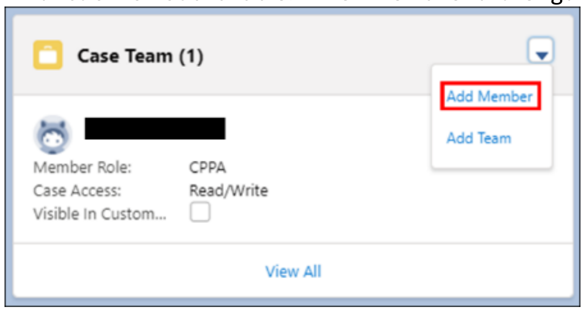


ADDING OTHER CPPAs TO A CASE TEAM

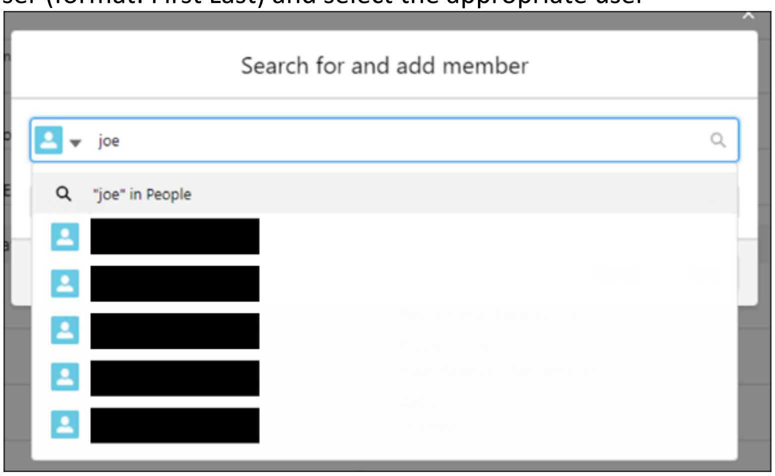
These steps can be done at any time before OR AFTER submission!!

Step 1: Click dropdown next to "Case Team" and select "Add Member"

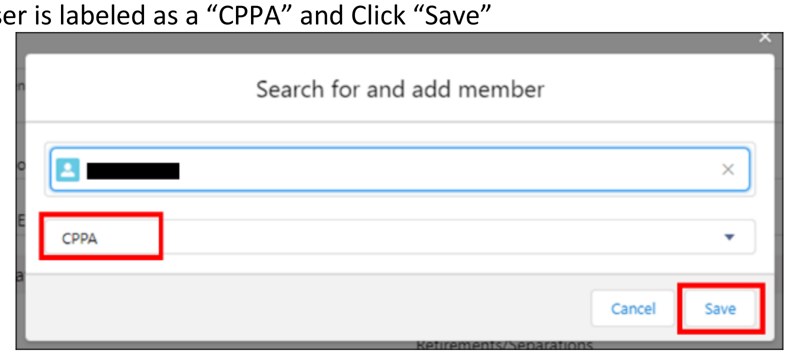
NOTE: Currently the "Add Team" function is not available. When we have further guidance on this we will put the word out!



Step 2: Search for another user (format: First Last) and select the appropriate user



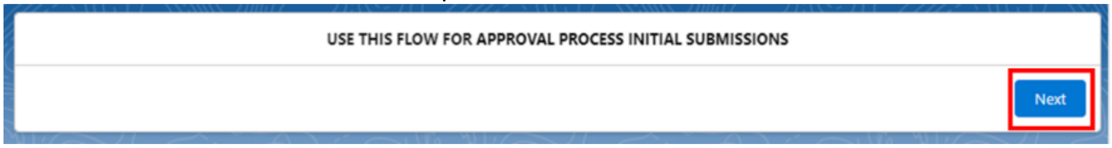
Step 3: Ensure the other user is labeled as a "CPPA" and Click "Save"



Step 4: Repeat steps 1 to 3 for all members of your team! If you do not, they will not be able to see and work on the case!!

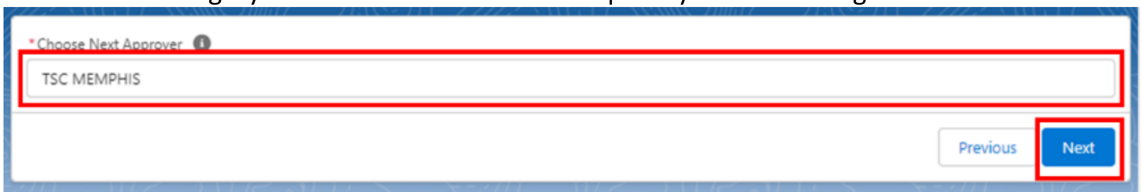
SUBMITTING CASE TO PSD/TSC

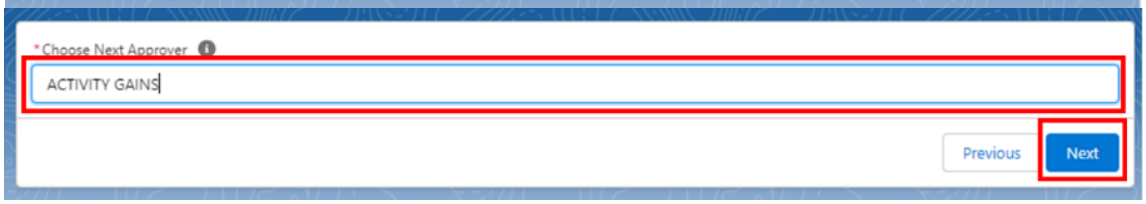
Step 1: Click the “Next” button on the tile at the top-center of the case



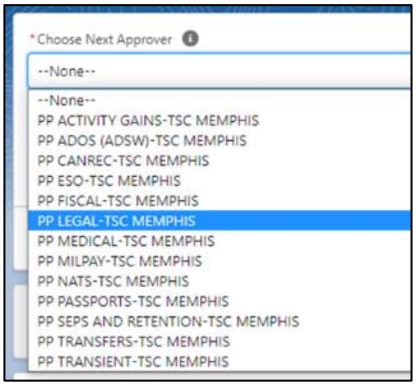
Step 2: **ALL start with PP-**

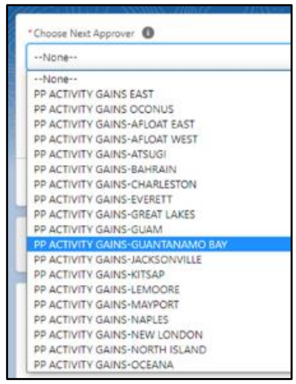
Type either the “Section Category” or the “Routed PSD” of the place you are sending the work to and click “Next”



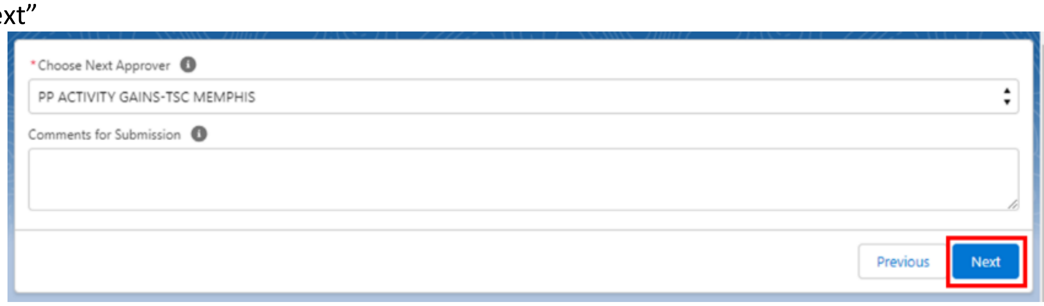


Step 3: Click the dropdown for a list of options and select the queue you need to send your case to.

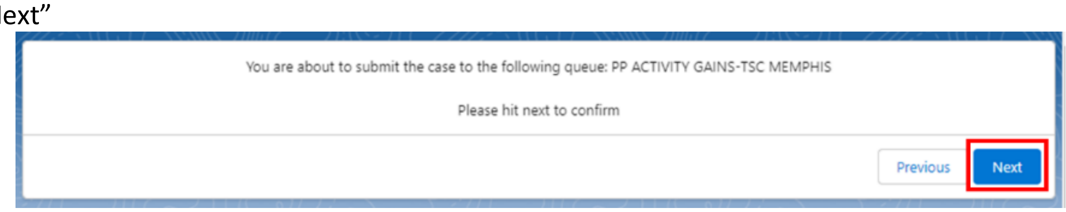




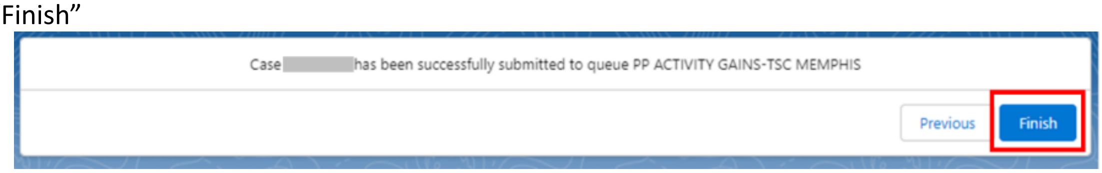
Step 4: Click “Next”



Step 5: Click “Next”



Step 6: Click “Finish”

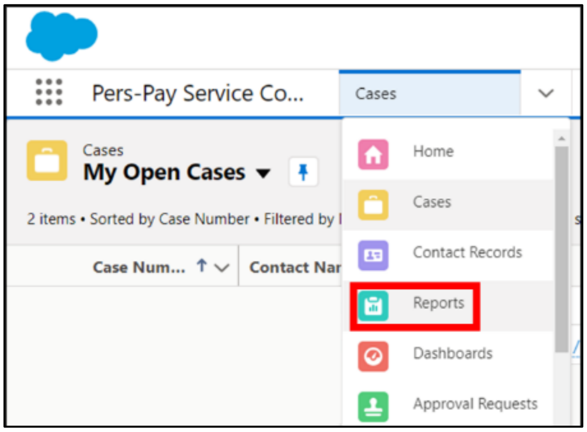


NOTE:

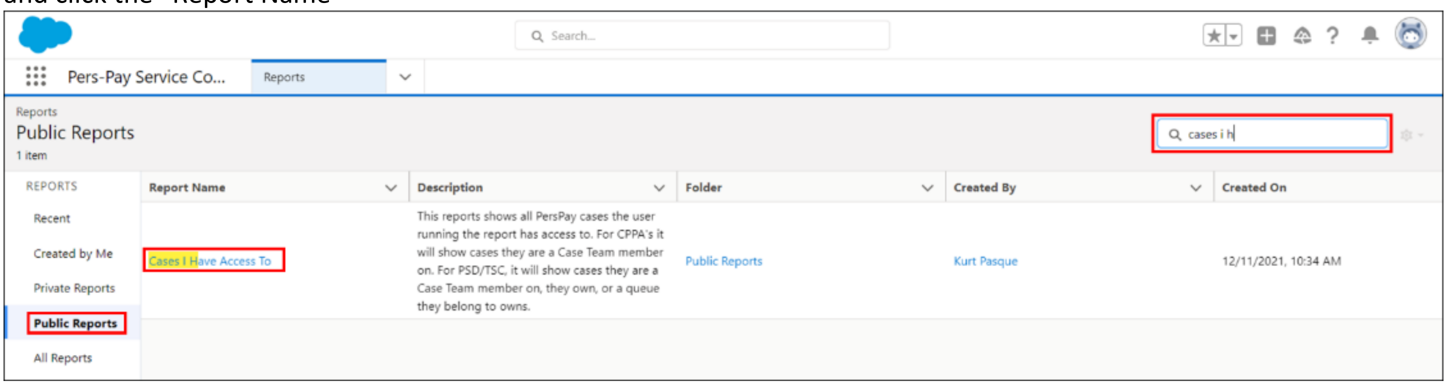
NOTE: Check the “Case Team” tile to ensure it is now populated with “PSD” members. If it is not after completing this process, you should contact the TSC, they have Coordinators that can see ALL cases and reassign to the appropriate queue. you may have submitted to a queue with no PSD/TSC members in it and will need to resubmit this work via a different case.

TRACKING YOU AND YOUR TEAMS' CASES

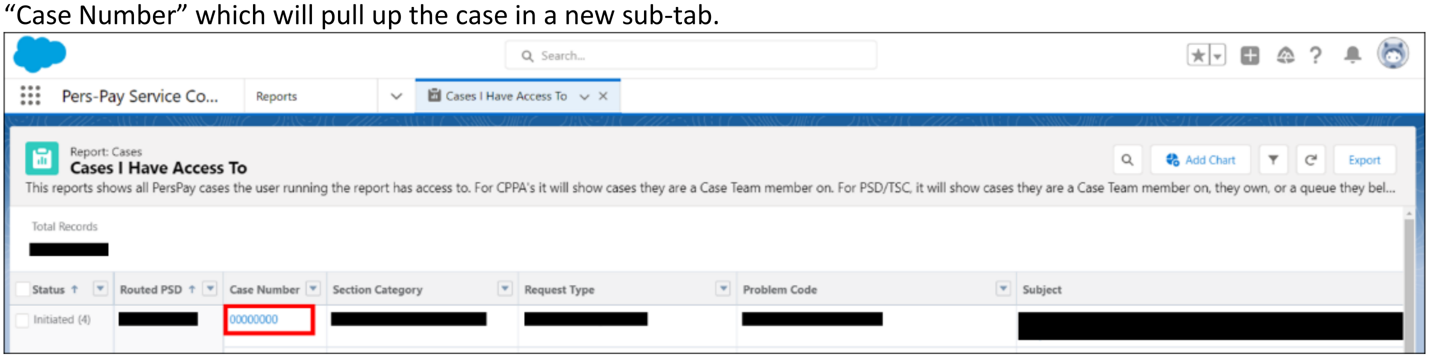
Step 1: Navigate to the "Reports" page from the navigation drop down



Step 2: Click on "Public Reports" on the left hand side of the screen, search for the report titled "CPPA Case Tracking", and click the "Report Name"



Step 3: In order to make any edits, add comments, add more files, or view the case history you will need to click on a "Case Number" which will pull up the case in a new sub-tab.



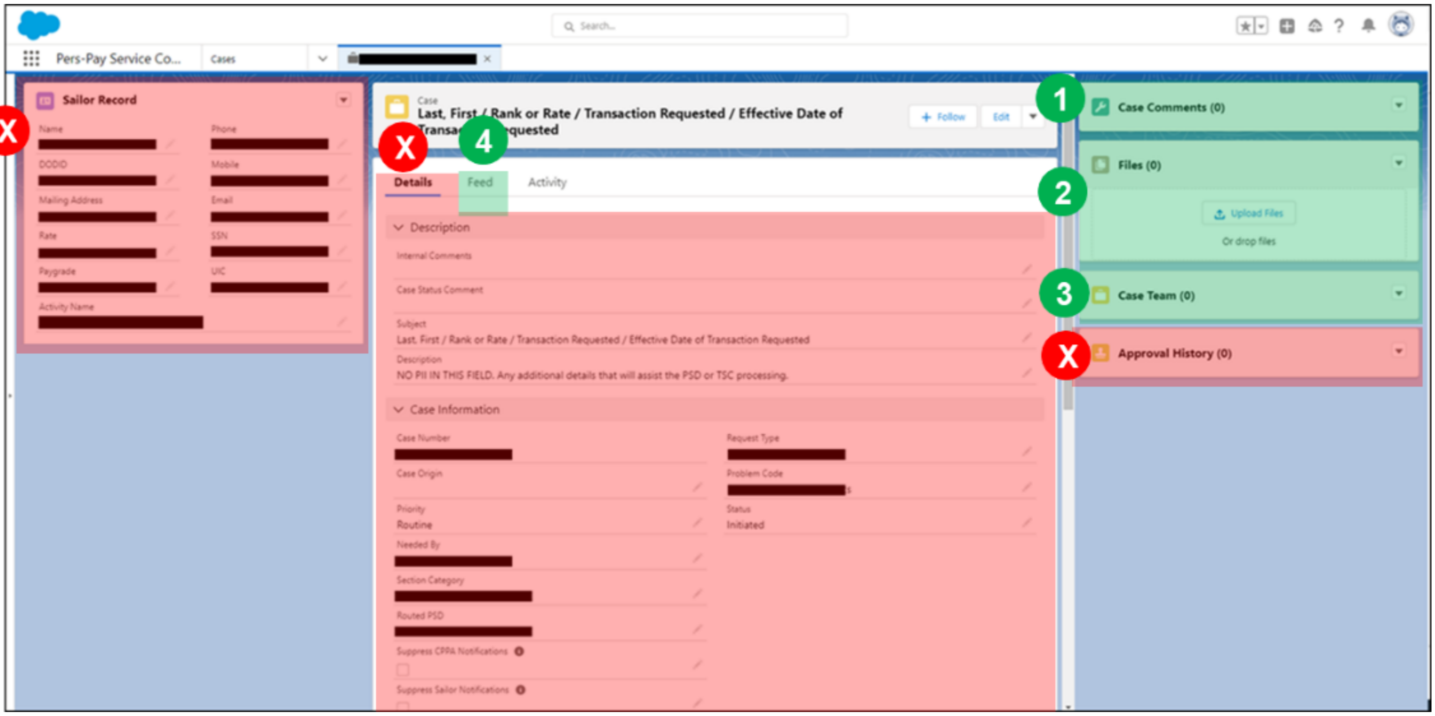
This report will show you cases that you are a **Case Team** member on. You can get this report in spreadsheet form by clicking "Export" in the upper right-hand corner and following the prompts after that.

WHAT CAN YOU EDIT ON A CASE AFTER YOU SUBMIT IT?

<u>The CPPA can:</u>

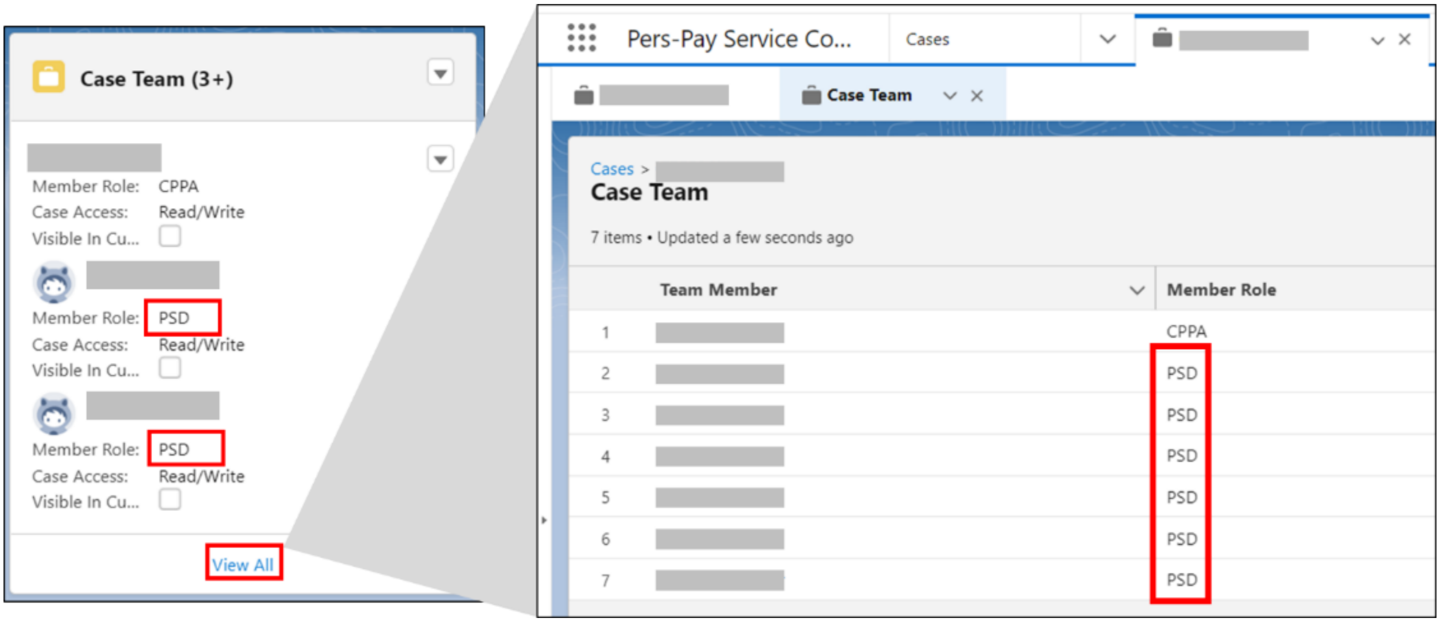
1. Add comments under the comments tile
2. Add or remove files under the Files tile
3. Add or remove case team members under the Case Team tile
4. Post updates and messages under the Feed tab

<u>The CPPA cannot</u> affect or edit any other parts of the case not listed under “CPPA can” after they have submitted it!



WHO AT PSD/TSC CAN SEE MY CASE?

BLUF: Anyone in the "Case Team" tile labeled "PSD" or "Manager"! Click "View All" on that tile to see the full list.



If you submitted a case and no one is in the Case Team tile with the role "PSD", then you either

- Submitted to a queue that has no PSD members in it

Or you submitted to an individual user or a call center queue- **you should then contact the TSC, they have Coordinators that can see ALL cases and reassign to the appropriate queue.**

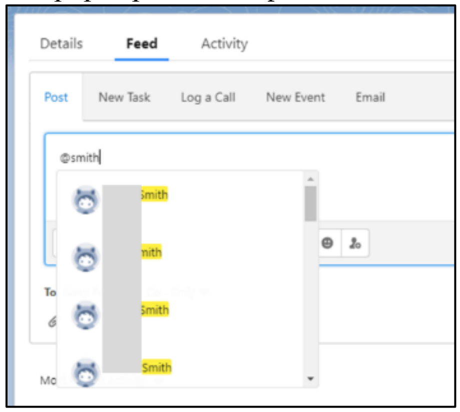
How to fix: Please contact your servicing PSD/TSC on what queue you need to be submitting that work to if you do not already know. All queues reserved for PSD/TSC work begin with the same naming convention of "PP". If there are no PSD members in a queue, remember to **contact the TSC, they have Coordinators that can see ALL cases and reassign to the appropriate queue.**

- !!NOTE!! Be sure to leave a comment in the original case as to what happened so that a corporate account can come in and close the case out.
  - Suggested comment: "PLEASE CLOSE CASE. SUBMITTED TO EMPTY/WRONG QUEUE AND I HAVE RESUBMITTED THIS WORK VIA CASE#XXXXXXX"

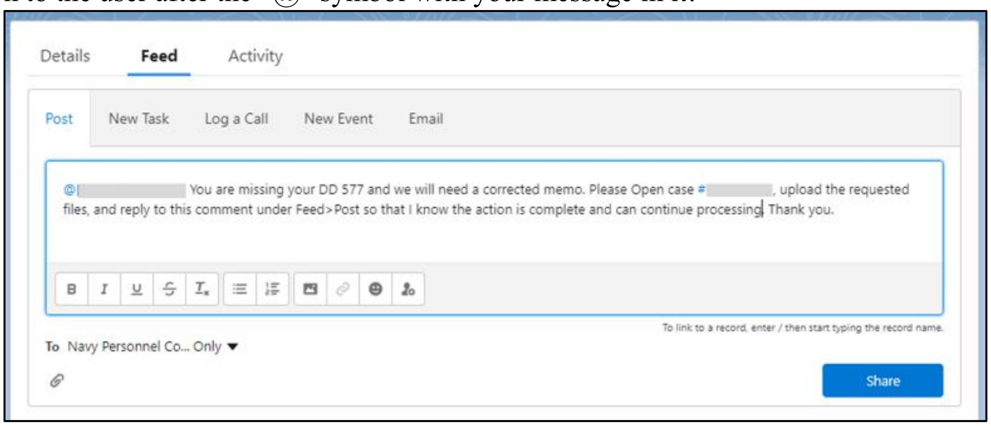
COMMUNICATING USING POSTS WITHIN SALESFORCE

Step 1: Within a case, navigate to the "Feed" tab and then to the "Post" sub-tab.

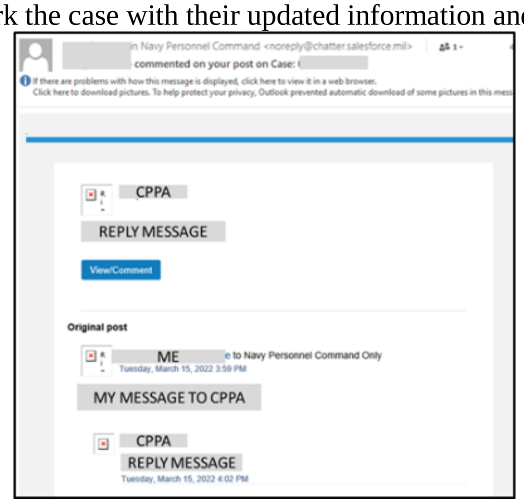
Step 2: Begin typing into the "Share and Update" field by typing the character "@" and begin typing any part of the CPPA's name (first or last). When their name pops up in the dropdown, click their name.



Step 3: After adding the correct user in Step 2, type your message you need them to see and click "Share". This will send an email notification to the user after the "@" symbol with your message in it!



Step 4: When anyone replies to your comment, you will get an email from SalesForce that looks like this. This will be your notification to go back in and work the case with their updated information and/or documents.

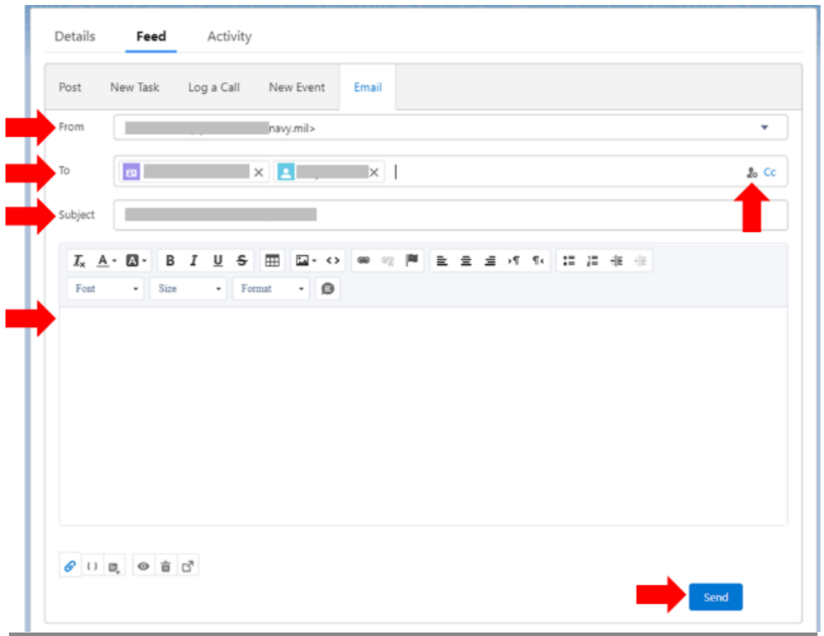


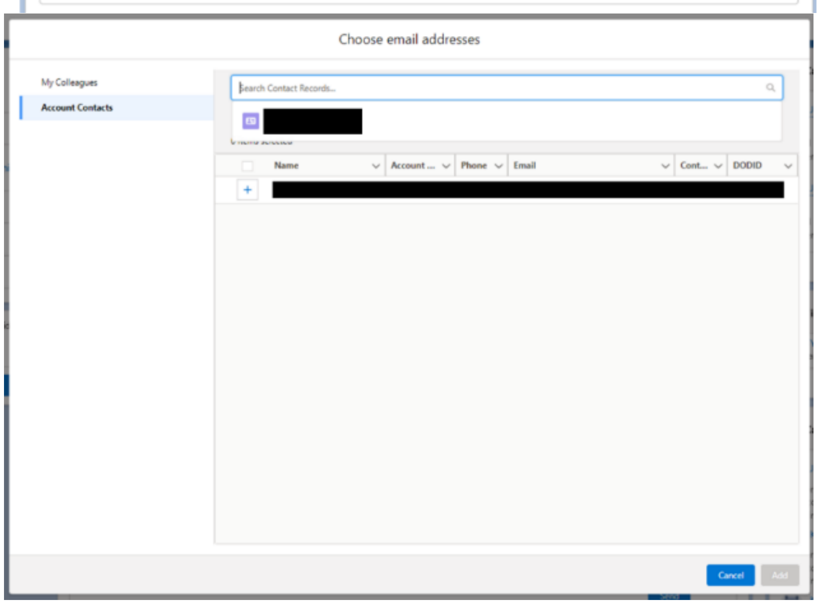
EMAILING WITHIN SALESFORCE

Step 1: Within a case, navigate to the “Feed” tab and then to the “Email” sub-tab.
Step 2: Make edits to the email **(NO PII IS ALLOWED IN THESE EMAILS!!!)**

- **From**: It is bad practice to make the from line “--None--“or the no-reply address!! Ensure the recipients know who it is coming from.
- **To/CC**: Add any contacts, emails, users you need to add to the To and CC lines by clicking the small icon on the right-hand side of the “To” field
    - Search using “My Colleagues” to search for anyone with a CPPA, PSD Supervisor, or PSD Clerk SalesForce account
    - Search using “Account Contacts” to search for any member of the Navy
        - Note: SalesForce gets Sailors’ emails from what they have listed in their MilConnect data and is the same information as the “Sailor Record” on the left-hand side of the screen
- **Subject**: Change as needed
- **Body of email**: Type message, ensure it is clear, concise, courteous, and professional for all recipients!

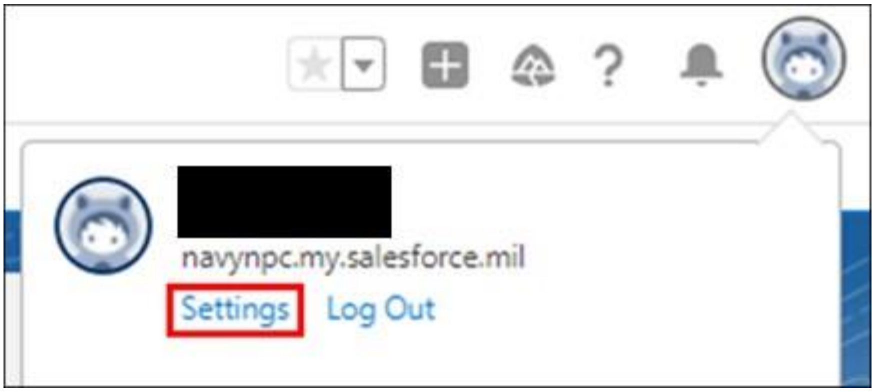
Step 3: Click “Send



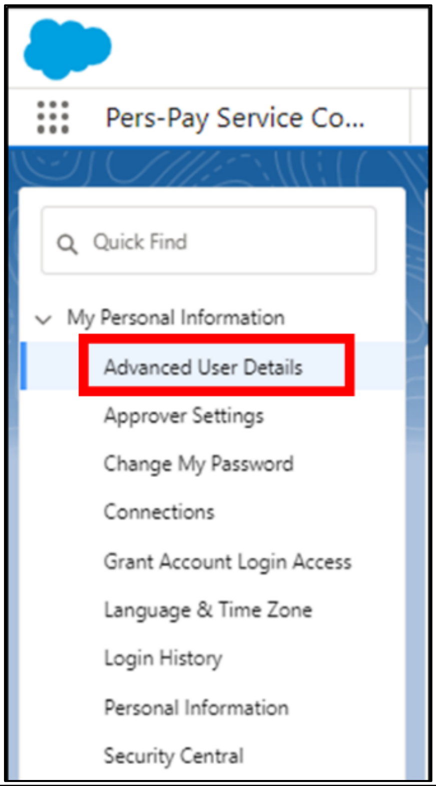


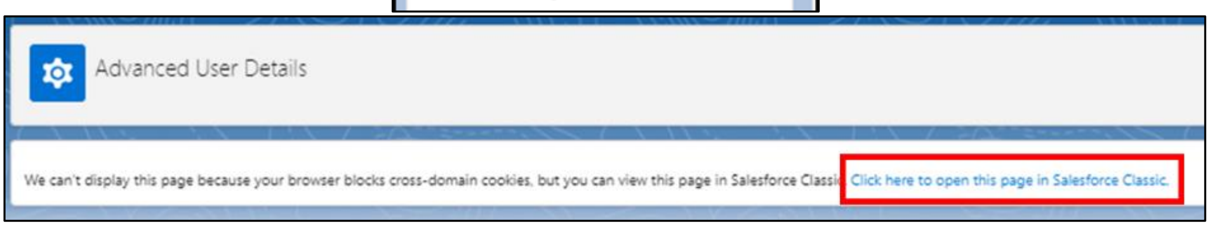
HOW TO CHECK KEY ACCOUNT SETTINGS

Step 1: Click your "Avatar" in the upper right-hand corner
Step 2: Click the word "Settings"



Step 3: On the left-hand side of the screen, click "Advanced User Details". If prompted to "view in classic mode" click the link to do so which will open up a new tab.





Remember

Step 4: Review key items such as Queue Membership, Role, and Email to ensure you have the correct information listed.

Remember to switch back to the Lightening Experience when done.

If something appears wrong, you can edit certain parts of your account, but other parts will require a new SAAR or an administrator to fix.

HOW TO BUILD YOUR OWN REPORT FROM SCRATCH

The instructions in this guide were taken from this article:
https://help.salesforce.com/s/articleView?id=sf.reports_build_lex.htm

There is also a video you can watch here:
https://salesforce.vidyard.com/watch/qGpi4cPjtUWQ7XV1jT6xnM

!!IMPORTANT NOTE!! The **primary** report type that will be beneficial to you will be "Cases" which can show you key details of cases you have access to. The next most useful report would be "Case History" which shows case history details from cases that you have access to. The video and below instructions talk about "Opportunities" reports and various other report types, but if you build those reports you will likely not find anything there because the primary way the Navy uses this version of SalesForce is to create cases so we can track and workflow requests made by our CPPA's. Hope this guide helps!

1. From the reports tab, click New Report.
    a. If you do not have "New Report" as an option, email askmncc.fct@navy.mil to request that the "PersPay Reports" permission set be added to your user account. ALL PersPay accounts have been authorized to have this permission set which allows you to make and edit reports.
2. Choose a report type, then click Continue.
    a. The report type you choose determines which records are returned and which fields are available in your report.
3. The report opens in edit mode, and shows a preview.
    a. In edit mode, add and remove fields to your report as columns, group by rows and columns, filter report data, or add a chart. Customize your report until it shows exactly the data that you need.
4. To add a column to your report,
    a. Choose a field from the Add column... picklist.
    b. Alternatively, expand the Fields pane, then drag a field onto the Columns list or directly onto the report preview. To select multiple fields, press Ctrl (Windows), Cmd (Mac), or Shift when you click.
5. To remove a column from your report,
    a. From the Columns list, find the column you want to remove. Then click the Remove icon.
    b. Alternatively, from the preview pane, find the column you want to remove. Click the column actions icon | Remove Column.
    c. To remove all columns from your report, from the Columns list, click the column actions icon | Remove All Columns.
    d. Removing a column from your report doesn't delete the field. If you remove a column, but want it back, add it again.
6. To summarize a column in your report,
    a. From the preview pane, find the column you want to summarize. Click the column actions icon | Summarize.
    b. Choose how you want to summarize the column: Sum, Average, Max, Min.
7. To group records in your report,
    a. Choose a column from the Add group... picklist under GROUP ROWS.
    b. After grouping a row, you can group a column by choosing a column from the Add group... picklist under GROUP COLUMNS. Group up to 2 rows and 2 columns.
    c. After grouping records by a date field, you can also customize date granularity. First select the date field you want to group your report by. Then, for Group Date By..., apply a calendar or fiscal period.
    d. Alternatively, drag a column from the Columns list or from the preview pane onto the GROUP ROWS or GROUP COLUMNS list.
    e. Alternatively, from the preview pane, find the column you want to group. Click the column actions icon | Group Rows by This Column (or Group Columns by this Column).
8. After adding a group, you can show or hide detail rows, subtotals, and a grand total by clicking the switches at the bottom of the preview pane.
9. To ungroup records in your report,

    a. From the Groups list, find the group you'd like to ungroup and then click the Remove icon.
    b. Alternatively, drag the group onto the preview pane.
    c. To ungroup all groups in your report, from the Groups list, click the remove all groups icon.

10. Unless you drag the group onto the preview pane, removing a group also removes the column from your report. If you still want to show the column, add it back.
11. To filter records from your report, click the Filters icon FILTERS.
    a. Depending on which report type you chose, your report has between two and four standard filters that are applied by default. Most templates include a Show Me filter and a Date filter. The Show Me filter scopes report results around common groups, like "my opportunities" or "all opportunities". The Date filter scopes results around a date field, like "created date" or "closed date".
        i. To add a field filter, choose a field from the Add filter... picklist.
        ii. To edit a filter, including standard filters, click the filter.
        iii. To remove a filter, click the Remove icon on the filter.
    b. For more information about filtering reports, see Filter Report Data in Salesforce Help.
12. To add a chart, first add at least 1 group, then click Add Chart.
    a. A chart appears. To customize the chart, click the gear icon. Change the chart type, color palette, and more.
    b. To show or hide the chart, click the toggle icon.
    c. To remove the chart, click the gear icon | Remove Chart.
13. Click Save. If you're creating a brand new report, give it a name. Optionally, give it a description. With access and sharing in mind, save the report in an appropriate folder.
14. To view complete report results, click Run.