

Training Quick Start Guide

How to Navigate Salesforce



PERS/PAY support will need to access the Service Console to work on cases from Customers. Use the guidance below to familiarize yourself with the screen layout and key drop-down functions. For support accessing the system please refer to the *How to Login and Logout* quick start guide.

Part 1: The Homepage

- 1 System Environment:** Indicates the current environment in which you are operating
- 2 Navigation Bar:** Displays open queues and cases. Displays icons for key functions (outlined in detail below)
- 3 Recently Viewed Cases:** Displays recently viewed cases. You can choose how they are sorted
- 4 Recently Viewed Contacts:** Displays recently viewed contacts. You can choose how they are sorted
- 5 Items to Approve:** For **PERSPAY Clerks and Supervisors only** shows cases requiring approval

The screenshot shows the Salesforce homepage for a user named 'Sandbox Training'. The interface includes a top navigation bar with a search bar and various utility icons. Below the navigation bar, there are three main sections: 'Recently Viewed Cases' (3), 'Recently Viewed Contact Records' (4), and 'Items to Approve' (5). The 'Items to Approve' section lists several cases submitted by 'NAVY CPPAUser-6'. The 'Recently Viewed Cases' and 'Recently Viewed Contact Records' sections both show 'No items to display'.



Note: When you login to Salesforce, the first thing you will see is your most recent previous screen. This screen layout reflects the Home Screen.

Part 2: The Navigation Bar

- 6 App Launcher:** Allows you to view and access other apps within Salesforce (each app contains different features and tabs)
- 7 Navigation Tabs:** Drop-down allows you to switch between views such as Home, Cases, and Contacts
- 8 Case Tabs:** When cases are open they will appear as tabs in the Navigation Bar
- 9 Search:** Drop-down arrow allows you to search specific areas of Salesforce
- 10 Favorites List:** Drop-down opens user-created list of shortcuts
- 11 Global Actions:** Drop-down opens a list of actions assigned to the user. Each global action will trigger a pop-out window asking for information from the user in order to execute the action
- 12 Help:** Accesses resources and training
- 13 Set Up:** If you have administrator privileges, you can use the setup menu to customize Salesforce further
- 14 Notifications Bell:** Alerts user regarding tasks assigned or other assigned items
- 15 Avatar:** Accesses user-specific customizations from your profile, including the Log Out function

The screenshot shows the navigation bar of the Salesforce Service Console. It includes the 'Service Console' label, a 'Home' tab (7), and several open case tabs (8) with IDs like '00001020', '00001028', and '00001101'. The search bar (9) is also visible. On the right side, there are icons for 'Favorites List' (10), 'Global Actions' (11), 'Help' (12), 'Set Up' (13), 'Notifications Bell' (14), and 'Avatar' (15).

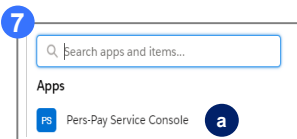
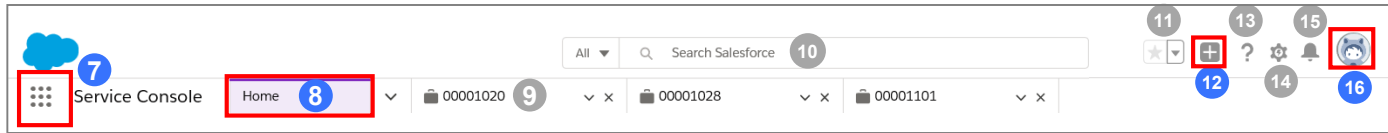
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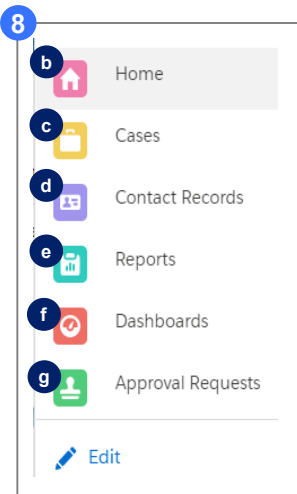
Part 3: Navigating Drop-down Menus

The image below displays the full Navigation Bar. Key items 7, 8, 12, and 16 have been expanded into their corresponding drop-down menus with letters to highlight additional functionality.



App Launcher

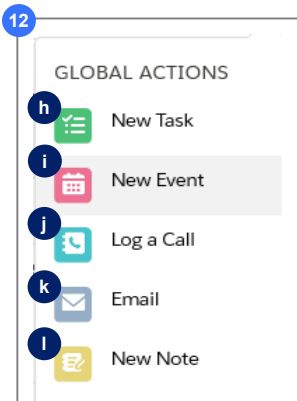
- a Pers-Pay Service Console:** Opens your core functions such as cases and queues



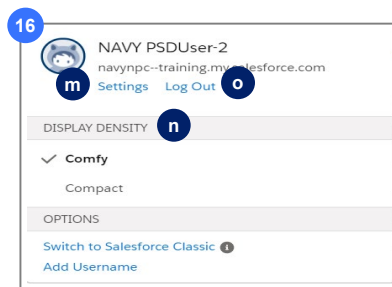
Navigation Tabs

- b Home:** Returns you to the Home page
- c Cases:** Opens your Recently Viewed Cases list
- d Contact Records:** Opens your Recently Viewed Contacts list
- e Reports:** Opens the system's Reporting capabilities where you can run common reports
- f Dashboards:** Opens the system's Dashboard capabilities where you can view dashboards
- g Approval Requests:** Opens cases to approve **by PERS/PAY Clerks and Supervisors only**

Global Actions



- h New Task:** Opens a window where you can enter and assign tasks. This is a default in Salesforce and shouldn't be regularly used in your work
- i New Event:** Opens a window where you can create a new event and set details
- j Log a Call:** Opens a window where you can document details of a call received or placed. This is a default in Salesforce and shouldn't be regularly used in your work
- k Email:** Opens email functions which have the ability to reference a case in the system
- l New Note:** Opens a window where you can write a note. These notes can be connected to cases, contacts, or other items in the system



Avatar

- m Settings:** Click to personalize your experience. As a Tier 2 Agent, you will have limited access to tailor your experience
- n Log Out:** Use this button to logout of the system
- o Display Density:** Change how much information you see on the screen