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 PERS/PAY Clerks and Supervisors only shows cases requiring approval

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

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

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

**Global Actions**
- **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
- **New Event**: Opens a window where you can create a new event and set details
- **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
- **Email**: Opens email functions which have the ability to reference a case in the system
- **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**
- **Settings**: Click to personalize your experience. As a Tier 2 Agent, you will have limited access to tailor your experience
- **Log Out**: Use this button to log out of the system
- **Display Density**: Change how much information you see on the screen