



Training Quick Start Guide

How to Navigate eCRM

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 eCRM homepage interface. Callout 1 points to the 'Sandbox: training' environment indicator. Callout 2 points to the navigation bar containing 'Pers-Pay Service C...' and 'Home' tabs. Callout 3 points to the 'Recently Viewed Cases' section, which is currently empty. Callout 4 points to the 'Recently Viewed Contact Records' section, also empty. Callout 5 points to the 'Items to Approve' section, which lists several cases submitted by 'NAVY CPPALUser-6'.



Note: When you login to eCRM, 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 eCRM (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 eCRM
- 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 eCRM 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

This detailed screenshot shows the navigation bar at the bottom of the page. Callout 6 points to the 'Service Console' app launcher icon. Callout 7 points to the 'Home' navigation tab. Callout 8 points to an open case tab labeled '00001020'. Callout 9 points to the search bar. Callout 10 points to the favorites list icon. Callout 11 points to the global actions icon. Callout 12 points to the help icon. Callout 13 points to the setup icon. Callout 14 points to the notifications bell icon. Callout 15 points to the user's profile avatar icon.

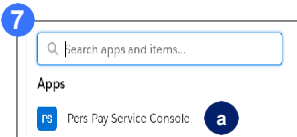
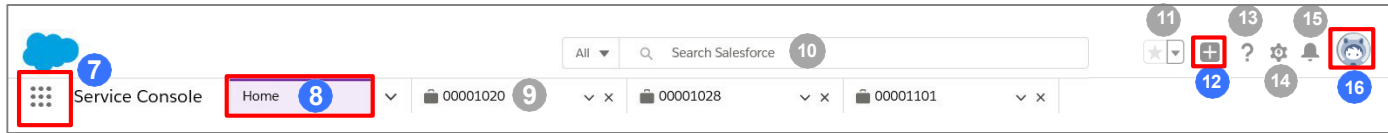


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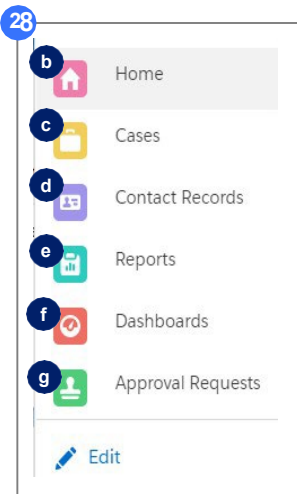
Part 3: Navigating Drop-down Menus

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

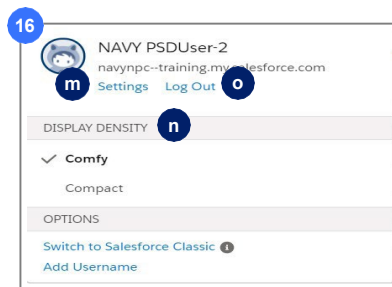
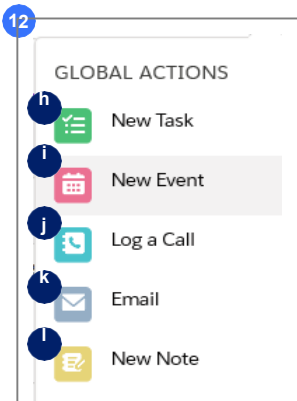


Navigation Tabs

- 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 eCRM 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 eCRM 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