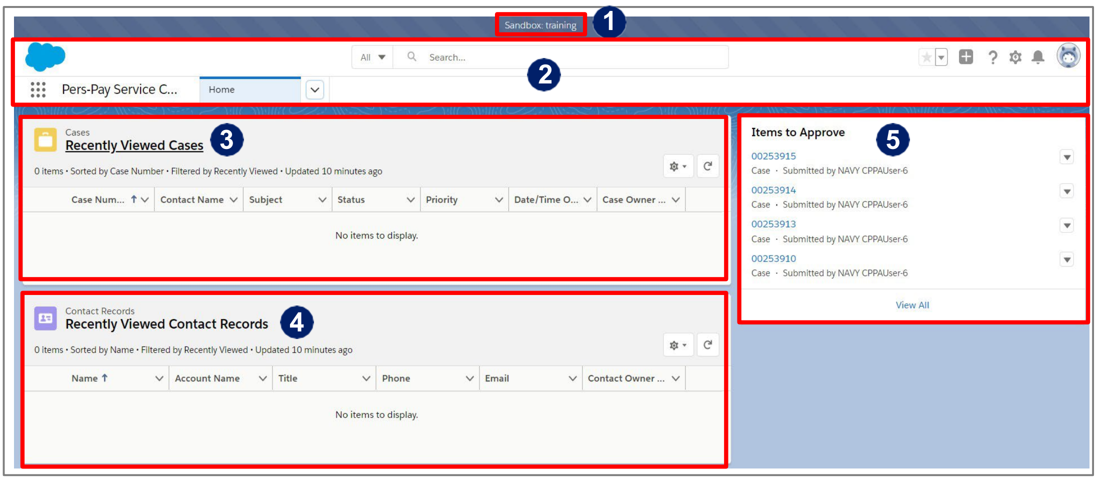
Training Quick Start Guide

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

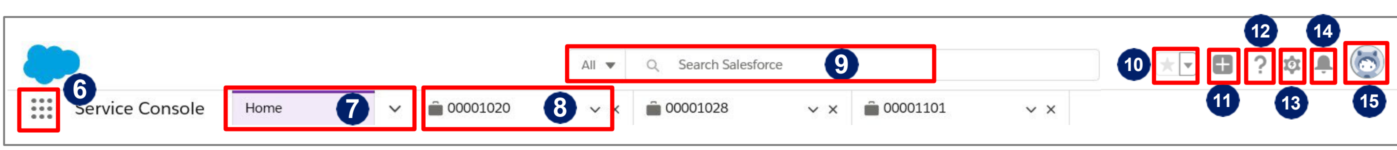
1. **System Environment:** Indicates the current environment in which you are operating
2. **Navigation Bar:** Displays open queues and cases. Displays icons for key functions (outlined in detail below)
3. **Recently Viewed Cases:** Displays recently viewed cases. You can choose how they are sorted
4. **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



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



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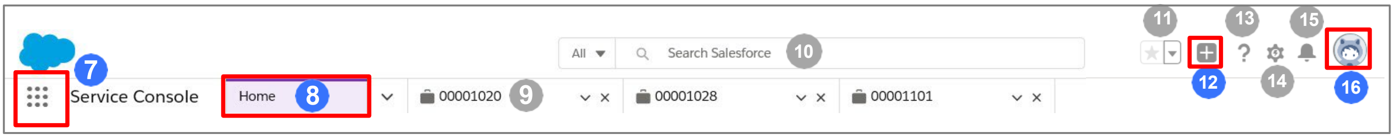
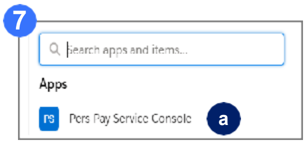
Part 3: Navigating Drop-down Menus

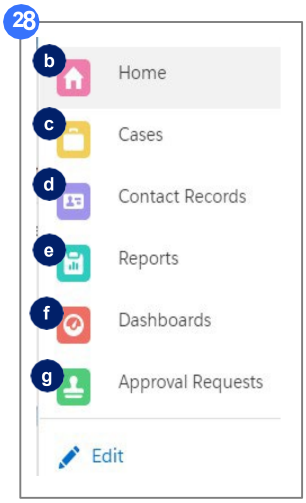
The image below displays the full Navigation Bar. Key items 7, 8, 12, and 16 have been expanded into their corresponding drop-down menus with letters to highlight additional functionality.





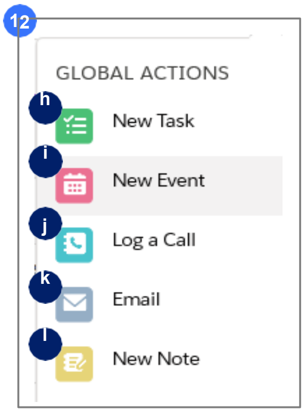
App Launcher

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



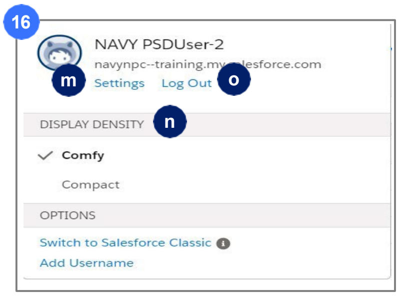
Navigation Tabs

- **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

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