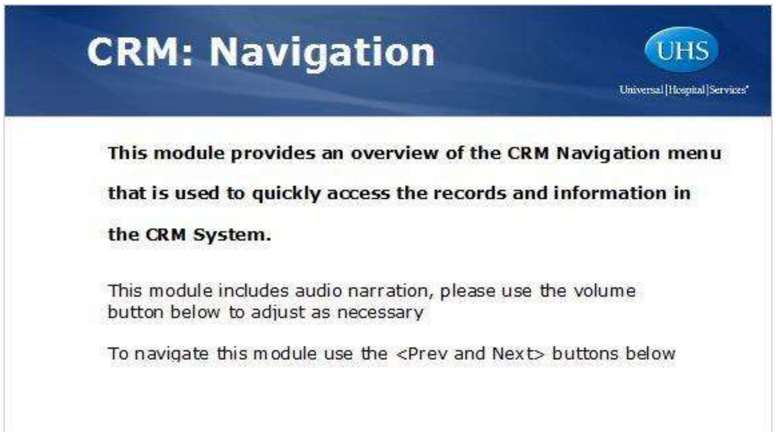
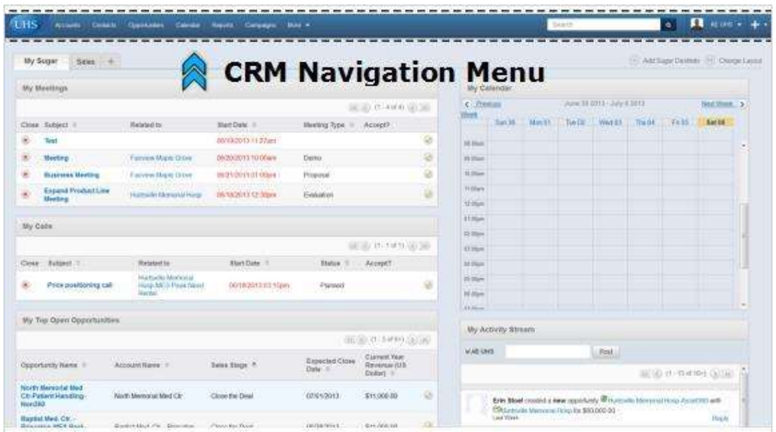
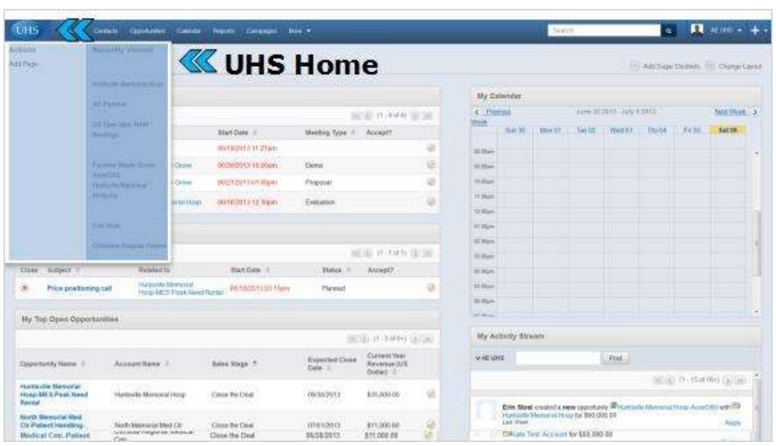


This training module provides an overview of the CRM Navigation menu that is used to quickly access the records and information stored in the CRM system.



At the top of the screen, the CRM Navigation menu is always available regardless of which module or screen you are viewing in the CRM system.



The UHS logo in the upper left corner of the Navigation menu is the Home button for the CRM system. Clicking on the UHS logo will return you to your own personal UHS home dashboard.

Hovering over any menu name in the navigation bar will display the related action, recently viewed and favorite records.

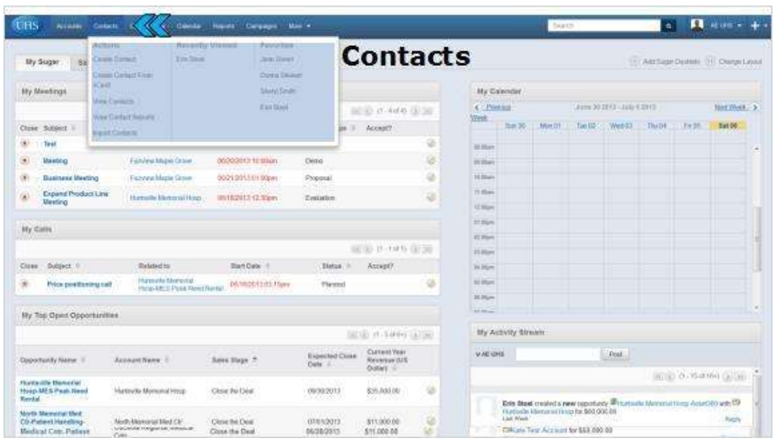
The Home module does not have any applicable Actions, but the menu does provide quick access to records you have recently viewed.

Clicking on the Accounts link in the Navigation menu will display the Accounts search listing screen.

The Accounts module records have information about organizations that have a business relationship with UHS.

The Action menu provides access to view accounts, and view reports that use accounts records for data.

You can also quickly access favorite account records or those you recently accessed.

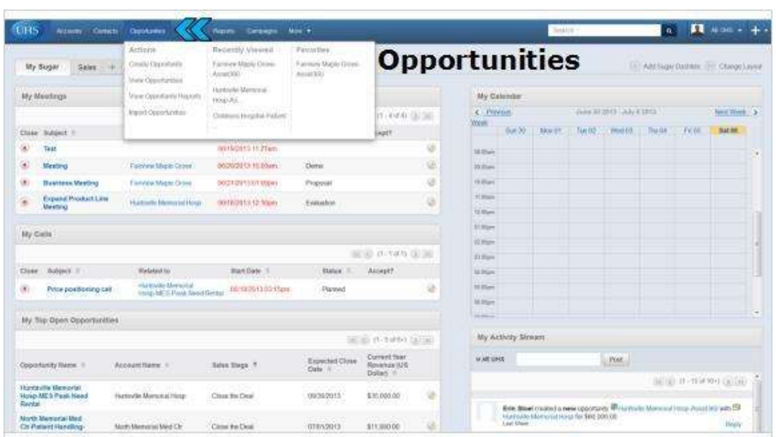


Clicking on the Contacts link in the Navigation menu will display the Contacts search listing screen.

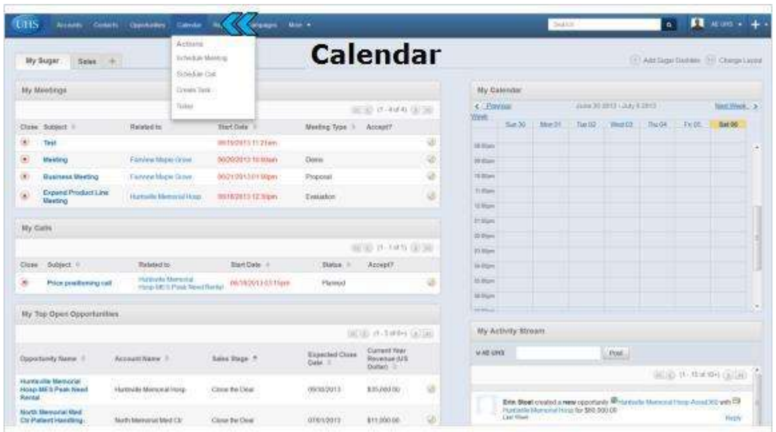
The Contacts module records have information about individuals that are associated with Account records.

The Action menu provides access to create contacts, view contacts, and view reports that use contacts records for data.

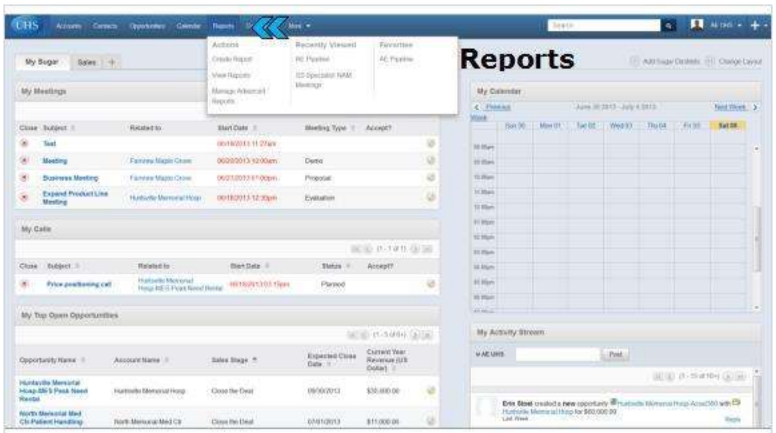
You can also quickly access favorite contacts records or those you recently accessed.



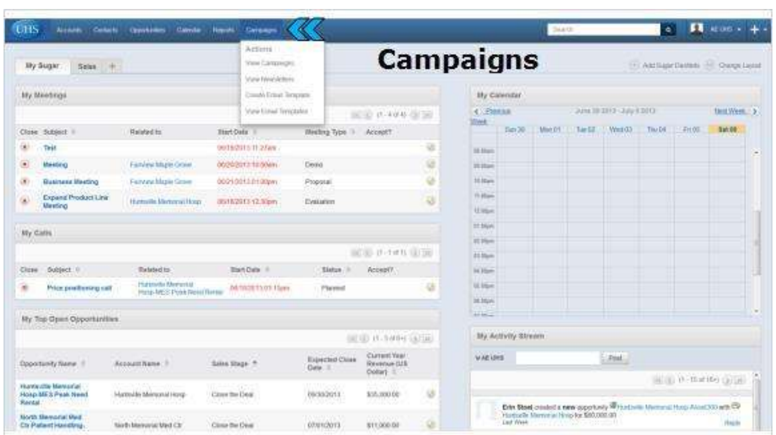
The Opportunities module in the CRM will allow you to track sales opportunities in your pipeline from start to finish.



The Calendar module in the CRM will allow you to schedule, view, track and log activities such as meetings, calls and tasks associated with Accounts and Contacts in the CRM.

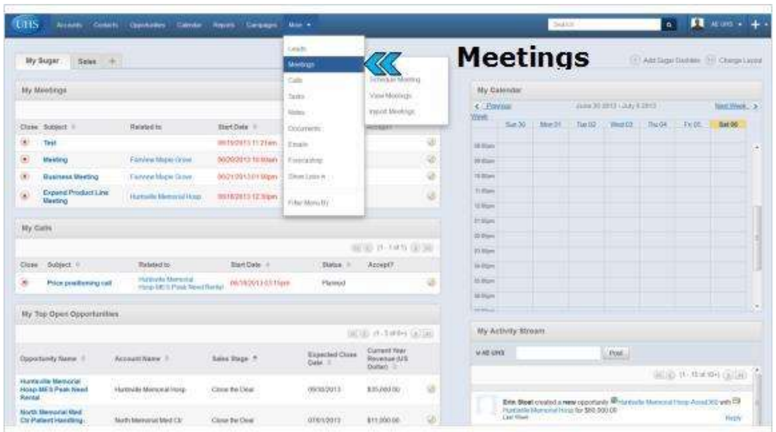


The Reports module link in the Navigation menu provides access to running and viewing existing reports in the CRM.



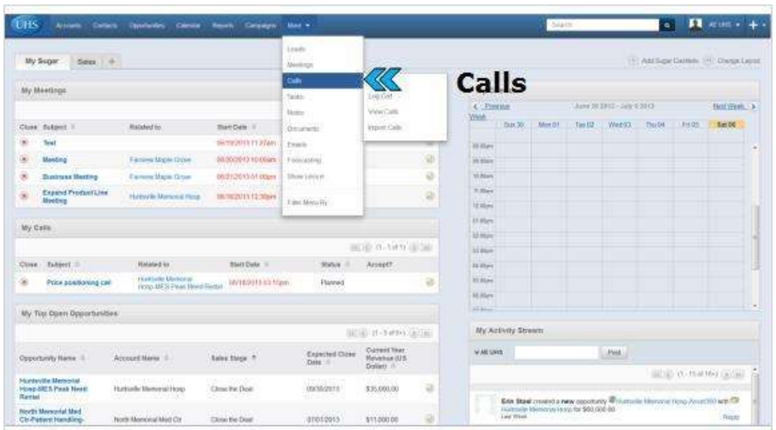
The Campaigns module link in the Navigation menu will provide quick access to campaign records.

Campaigns records can be created and tracked for marketing campaigns, national accounts and inside sales.



In the CRM Navigation menu, the Meetings link will access the Meeting records. Meetings can be associated with other CRM records such as Accounts, Contacts or Opportunities.

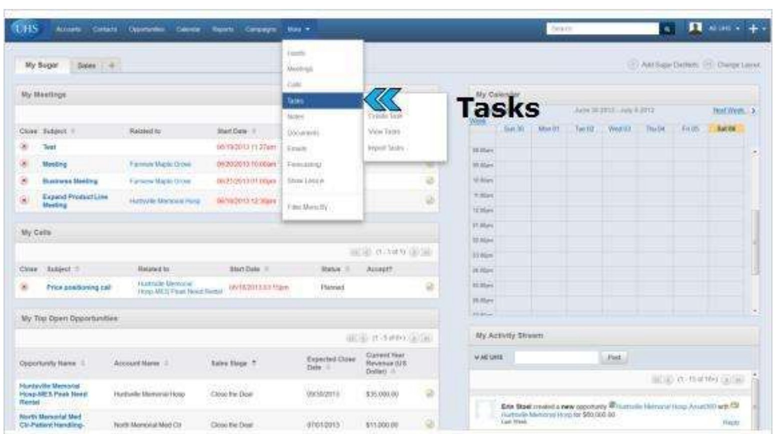
You can view meetings you have created as well as those that have been scheduled for you by others.



The Calls navigation menu link provides access to Call records.

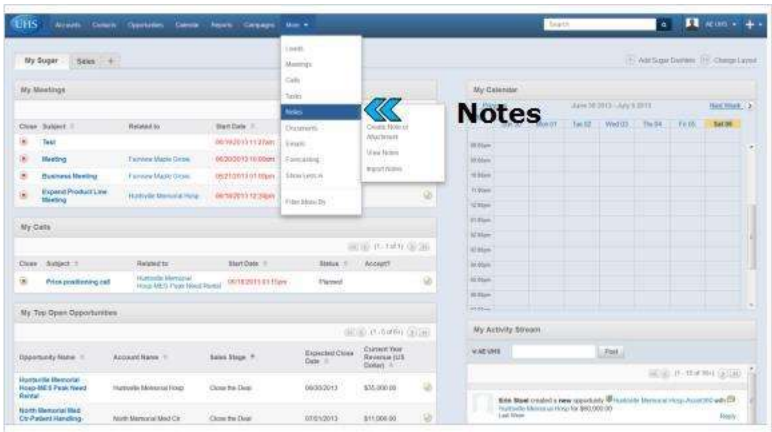
Calls can be linked to other CRM records like Accounts or Contacts.

Calls can be scheduled and logged from the Calls menu.

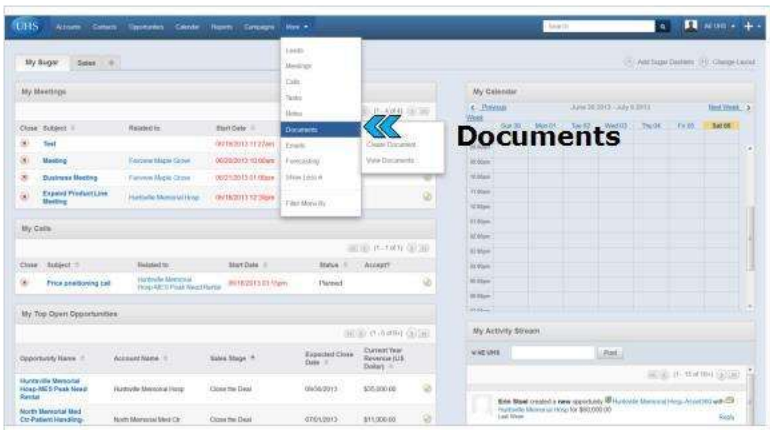


Tasks are the CRM system "to-do" activities that can be associated with other CRM records.

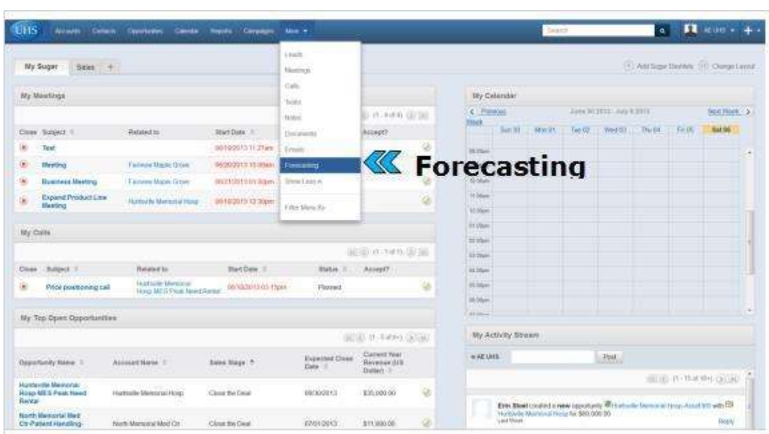
They are scheduled and displayed on your calendar.



The Notes module allows you to create, attach and view notes and documents to Account and Contact records.

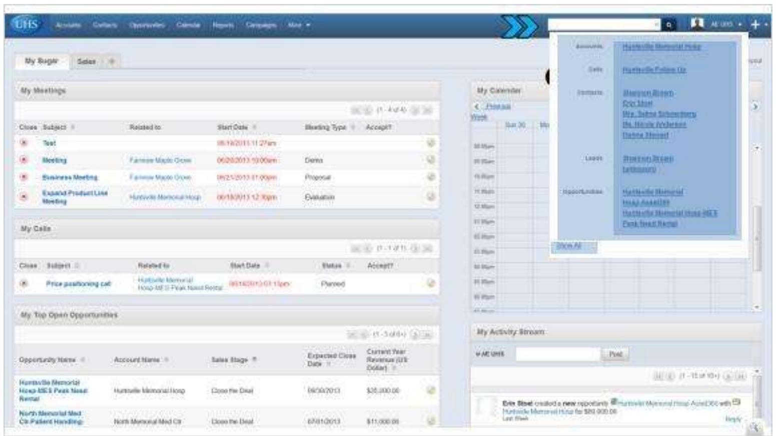


The Documents module stores documents related to specific CRM records.



In the CRM Navigation menu, the Forecasting link will display a revenue planning tool where you can convert your pipeline opportunities into a forecast.

This module will allow you to adjust the revenue monthly for seasonality.



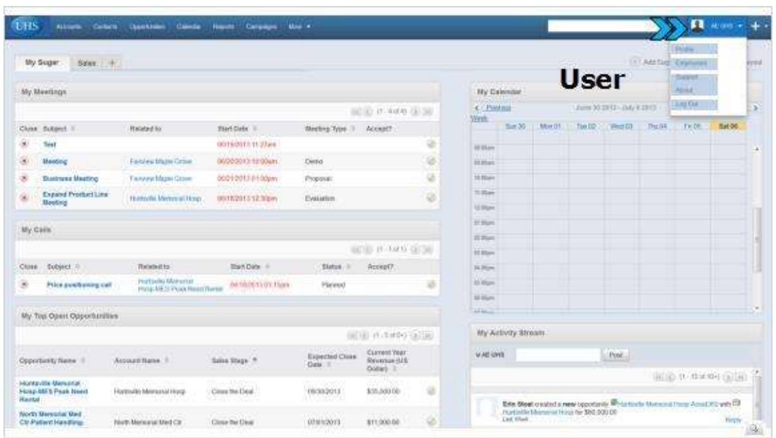
In the upper right of the CRM Navigation menu is a Global Search tool.

Searching using the Global Search tool will allow you to search across all record types within the CRM.

Results will display the top 5 corresponding records in each module.

The Show All link at the bottom of the search results menu will display all search results.

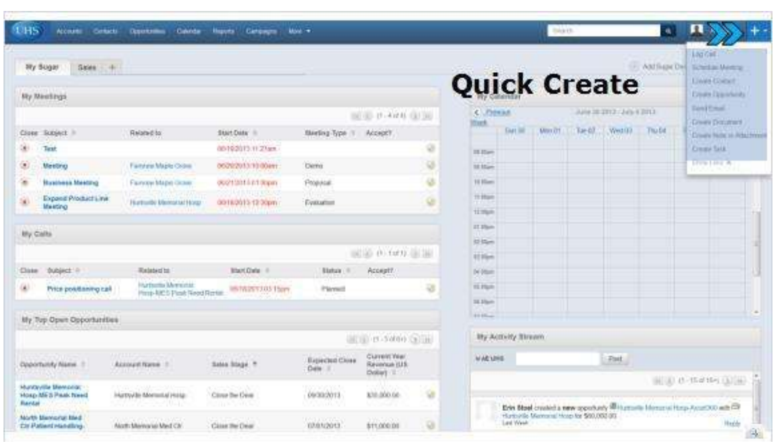
Clicking on a link in the Global Search results will display the specific CRM record.



On the Navigation menu you will see your name displayed; this is the User menu.

The user menu provides access to:

- Profile: update your employee profile information
- Employees: UHS employees directory
- Support: CRM technical support
- About: Displays CRM version information
- Log Out: Exit the CRM system



The plus sign (+) icon in the upper right of the Navigation menu is the Quick Create menu.

It provides quick access for users to create CRM records or activities.