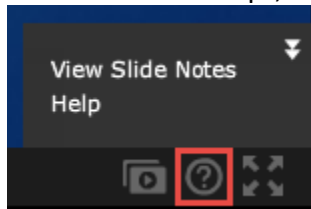


CRM Training Videos

New CRM users are required to view these training videos prior to attending a training session. Current users may wish to watch them as a refresher. They will play on any device, not just a computer.

To see the transcript, click on the ? icon in the lower right corner and choose 'View Slide Notes'.



[Training 1: Orientation and Usage](#) (3:44 mins)

- Purpose and Function
- Active Users and Team
- Service Definition
- Service Activities and Topics

[Training 2: Access and Navigation](#) (4:17 mins)

- Logging In
- Browser Specifications
- Navigational Tools
- CRM Components
- Ownership and Security

[Training 3: Dashboard and Contact Records](#) (5:47 mins)

- Setting a Default Dashboard
- Searching for a Contact Record
- Creating a New Contact Record
- Duplicate Contact Records

[Training 4: Cases and Activities](#) (8:11 mins)

- Searching for a Case
- Creating a New Case
- Recording Activities on a Case
- Resolving a Case