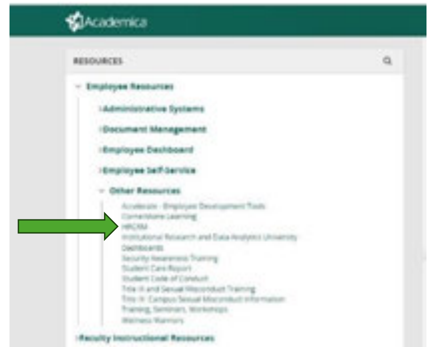
HRCRM Salesforce Navigation Basics & Best Practices

7/16/2024

Contents

HRCRM Access

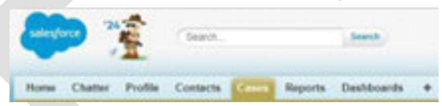


The HR Customer Relationship Manager (HRCRM) is accessible via single sign-on through Academica.

1. Sign on to Academica and locate the Resources section,
2. Select Employee Resources,
3. Select Other Resources,
4. Select HRCRM.

Basics

Issues brought to the attention of the HR Service Center (HRSC) are documented by creating a case in the HRCRM. Click the **Case** tab to display **Case** information.



Cases can be created:

- **Manually** by an HRCRM user – "Create New" – when an inquiry originates from:
  - Email (an individual's email account)
  - Chat
  - Mail
  - Meeting / In-person
  - Fax
  - Phone
  - Voicemail
  - Walk-in
- **Automatically** by **Email-to-Case** rules, which originate when an email is received in the following email accounts:
  - askhr@wayne.edu: Case Origin = "Email-to-Case – AskHR"
    - hrcrms@wayne.edu (admin) redirects to AskHR and feeds to HRCRM via that account
    - humanresources@wayne.edu redirects to AskHR and feeds to HRCRM via that account
  - benefits@wayne.edu: Case Origin = "Email-to-Case – BENEFITS"
  - smsrequests@wayne.edu (admin): Case Origin = "Email-to-Case - SMSREQUESTS"

  Email-to-Case cases are automatically assigned to the "New / Uncategorized" queue (replaces former default "General" queue.)

  The following email accounts no longer feed to HRCRM and the Email-to-Case entry has been deprecated:

    - hrsolutions@wayne.edu (HRAR)
    - comp@wayne.edu
    - hr-erc@wayne.edu
    - openenrollment@wayne.edu

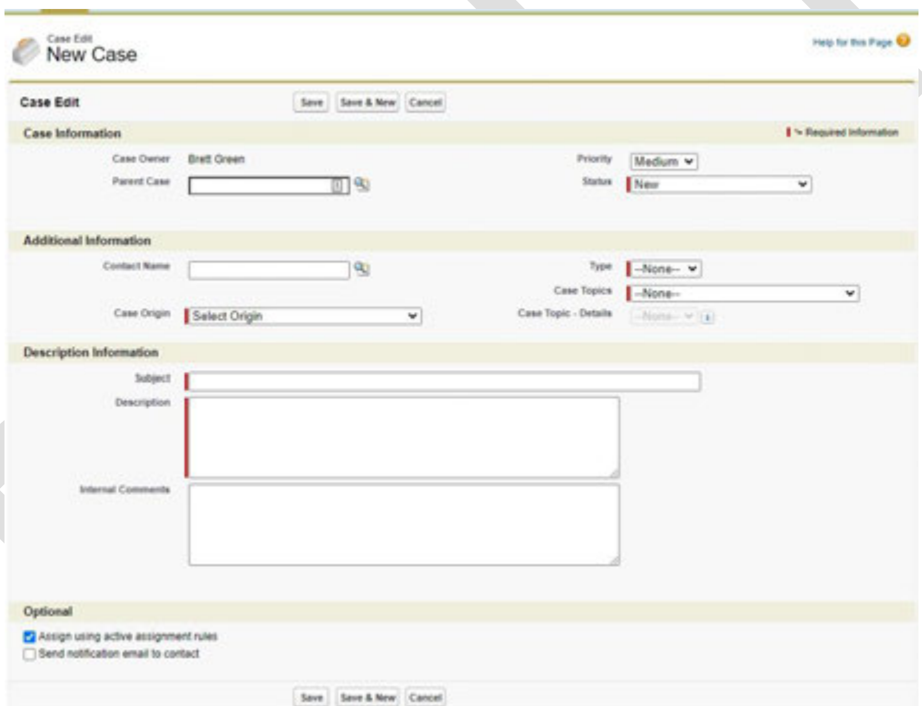
Case Information

A case contains the following information:

- **Case Owner:** This field contains the current case owner. For a new case, the originator of the case is the default Case Owner. The Case Owner may retain control of the case to resolve it on his/her own or can allow the case to be reassigned to a designated case queue. When a case is reassigned to a queue, the queue becomes the Case Owner. See Case Assignment for additional information.
- **Case Number:** The system-assigned number given to the case when it was created.
- **Parent Case:** If the currently displayed case does not have a related case(s), this field will be blank. If the currently displayed case is related to and is subordinate to another case, the other case will be the Parent Case and its case number will be displayed here.
- **Priority:** Importance indicators are High, Medium and Low
- **Status:** Indicates the status of the currently displayed case. Status indicators are:
  - **New** – automatically assigned by system upon origination.
  - **In Progress** – selected by the HRCRM user working on the case.
  - **On Hold** – selected by user when additional information is needed before progressing to address the issue for resolution.
  - **Facilitated** – selected by user when a case needs addressed by/transferred to an individual or group email account that is not in the HRCRM system and **no further action is to be taken by an HRCRM user**. ***Note:*** *Facilitated cases are effectively considered closed/resolved in the HRCRM while providing separate status data for use in reporting metrics/key performance indicators (KPIs).*
    - ***Best practice:*** *forward the email for facilitation to the individual or group email account that is not part of the HRCRM, requesting they address the inquiry directly with the client and copy askHR@wayne.edu (or other email account that is setup for "Email-to-Case" processing in the HRCRM) with the resolution.*
  - **Closed** = selected by user when a case is resolved – the client issue has been addressed and there is no further action to be taken by an HRCRM user.
- **Contact Name:** The individual who initiated the contact. This field is only populated if the email address matches an employee contact. If the field is blank, the interaction was initiated by an email account that does not match a WSU employee email account and their name may appear in the Web Name field.
- **Contact Phone:** The phone number of the WSU employee who initiated the contact.
- **Contact Email:** The email address of the WSU employee who initiated the contact.
- **Type (of case):** The Type field identifies the case type as a Problem, Question, or Request.
- **Case Topics:** Classifies the type of contact into general categories. By selecting a Case Topic and Case Topic Details, the Owner will automatically be updated as defined by the Case Assignment Rules. Example: Employee Benefits
  - ***Best practice:*** *Select the "Case Topic" and "Case Topic – Details" to categorize the case **prior** to assigning/reassigning or changing the case status to "facilitated."*
- **Case Topic - Details:** Further classifies the case into specific areas of the topic. Example: Retirement Savings Plans
  - ***Best practice:*** *Select the "Case Topic" and "Case Topic – Details" to categorize the case **prior** to assigning/reassigning or changing the case status to "facilitated."*

- **Case Origin:** Describes how the contact was initiated. Methods of originating cases include Email, Chat, Mail (US Postal), Meeting/In-person, Fax, Phone, Voicemail, Walk-in, and Email-to-Case.
- **Subject:** This field enable you to clearly describe the purpose of the contact.
- **Description:** The Description field allows you to further define the case.
- **Internal Comments:** Internal Comments are intended for internal use are NOT included in the email to the contact.
- **Date/Time Opened:** System automated date and time the case was created.
- **Date/Time Closed:** System automated date and time the case was resolved and closed.
- **Web Email:** The address that sent the email.
- **Web Name:** The name that appears on the email.
- **Web Company:** An available field that may be used for additional tracking purposes.
- **Web Phone:** An available field that may be populated with the initiator's phone number, i.e.: enter the phone number from a voice mail.

Required fields are indicated with red when a new case is manually created. When editing/updating an existing case, required fields are identified with red when the user clicks on a field or attempts to save the case.



Case Assignment

A case can be:

1. Retained within the HRCRM for solution
2. Assigned to an individual HRCRM user
3. Assigned to a Response Queue, or
4. Facilitated to an individual or group that is not part of the HRCRM

NOTE: By selecting a Case Topic and Case Topic Details, the Owner will automatically be updated as defined by the Case Assignment Rules.

Assign to HRCRM user: click the "Change" link, then click "User" to search and select an HRCRM user as the new Case Owner. ***NOTE:*** *confirm the "send notification email" box (located near the bottom of the case) is checked when sending to an HRCRM user.*

Assign to Response Queue: click the "Change" link, then click "Queue" to search and select a Response Queue as the new Case Owner. Queues may or may not have users assigned to receive automated notification. ***NOTE:*** *confirm the "send notification email" box (located near the bottom of the case) is checked when Queue is selected.*

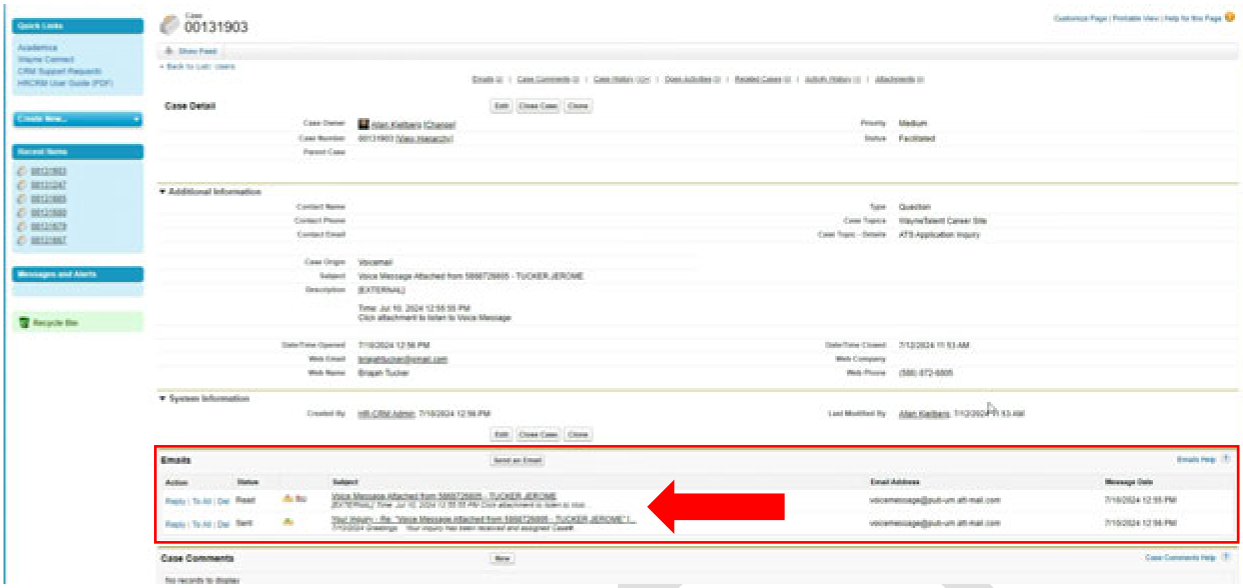
- ***Best practice when assigning to a Queue to ensure notification:*** Click to select the "send notification email" box (located near the bottom of the case) ***and,*** to provide detailed information, forward the original case email to the WSU individual responsible for the selected Queue – see "Forward Case Email."

Facilitate: Click the Status field and select "Facilitated." Ensure case information is accurate and updated. Forward the original case email to the non-HRCRM user – see "Forward Case Email." *Example scenario:* Received "email-to-case" that needs assistance from Marketing.

- ***Best practice when "facilitating" a case:*** Click the "Edit" button – this identifies all required fields that should be updated before proceeding. Select Type, Case Topic and Case Topic Detail. Change status to Facilitated. Save the case, then Forward original Case email and close.

Emailing from a Case in HRCRM

Case Emails are listed below the Case Detail. Click an email subject line link to view the email.



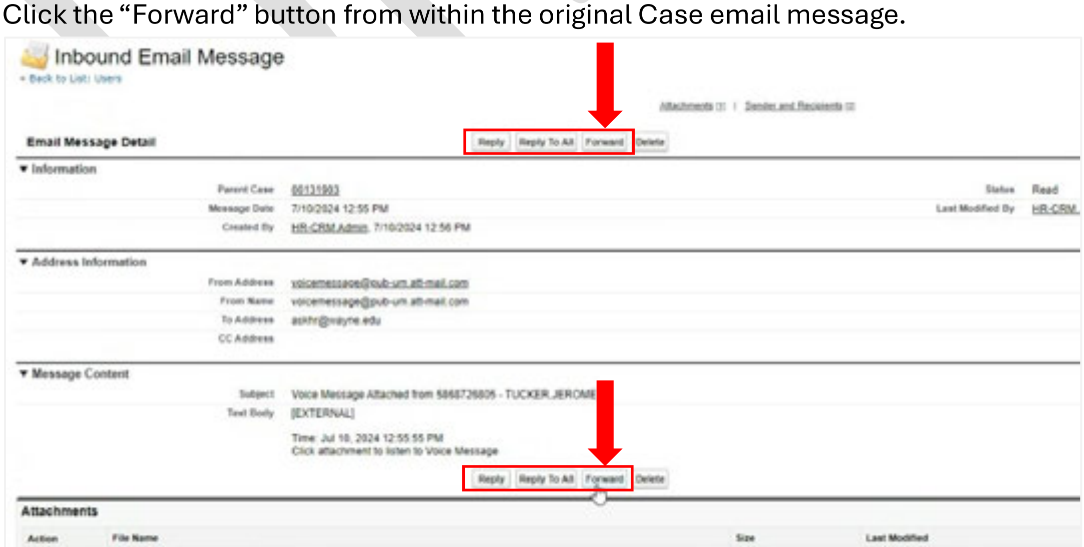
Within the Email Message Detail, buttons are available to Reply, Reply To All, or Forward.

- **Reply** (to the email initiator only) and **Reply To All** will include a reference to the case number but will not automatically include any additional case information or attachments.
- **Forward** will include the original case email, with case number, heading, and any attachments. ***Best practice:*** Forward the original Case email when "facilitating" a case to an account outside of the HRCRM.

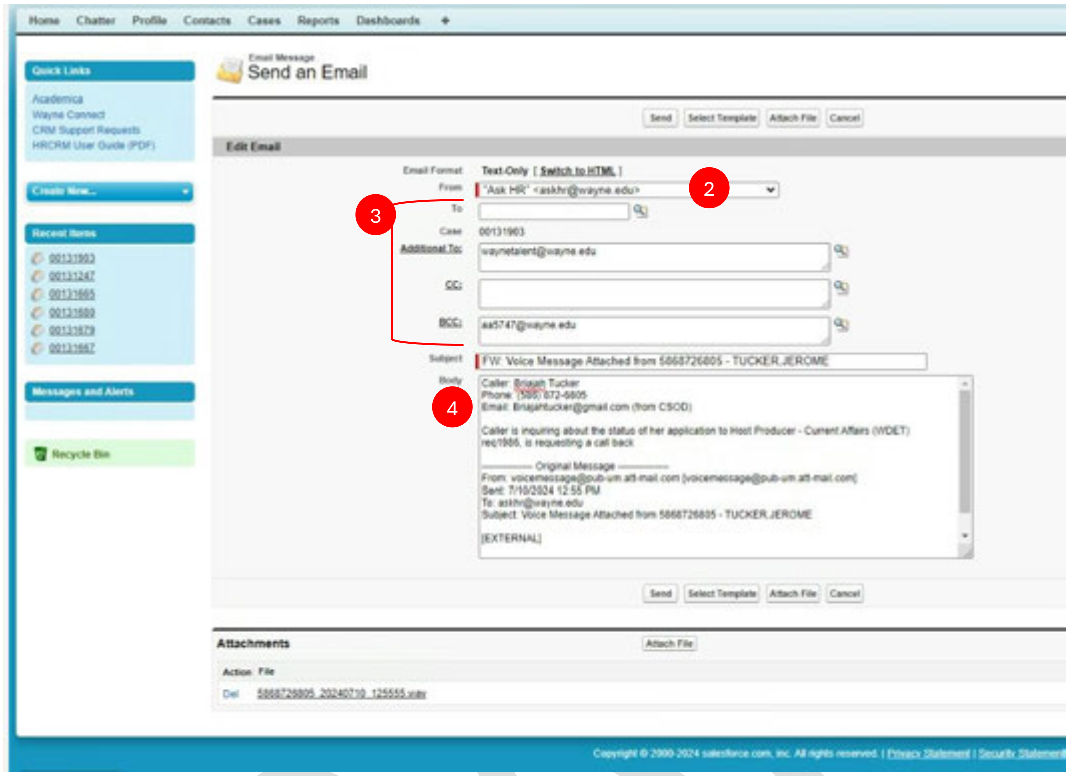
Forward Case Email (preferred method)

Forwarding the original Case email is preferred for sending case information and should be used when "Facilitating" a case to an account outside of the HRCRM. Forwarding ensures all information is included in the message, such as the case number, email heading and any attachments.

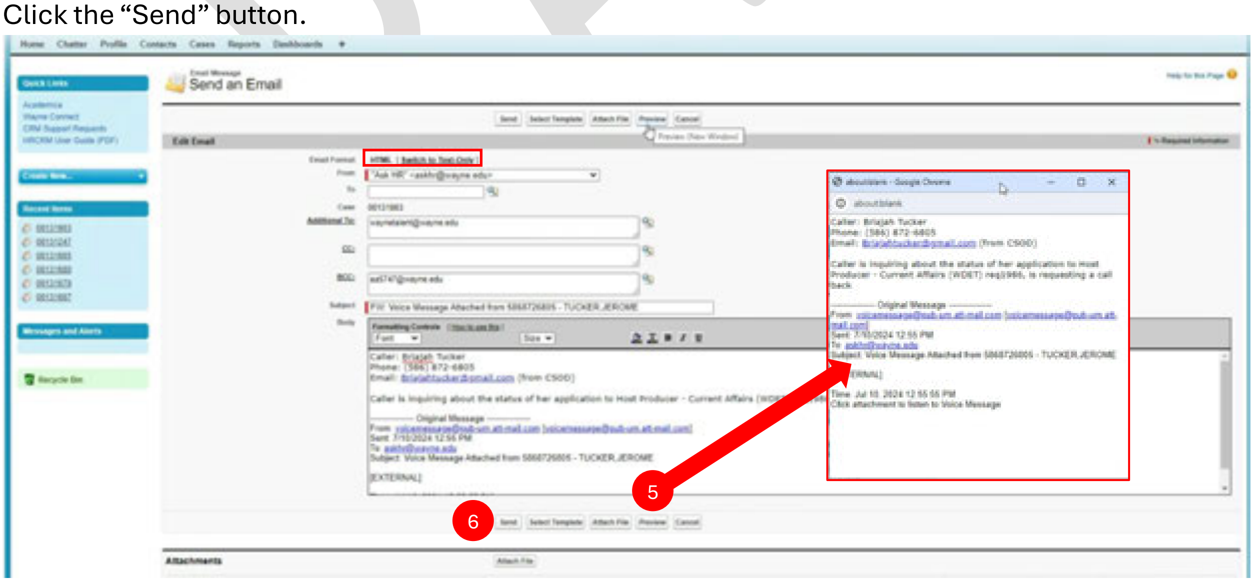
1. Click the "Forward" button from within the original Case email message.



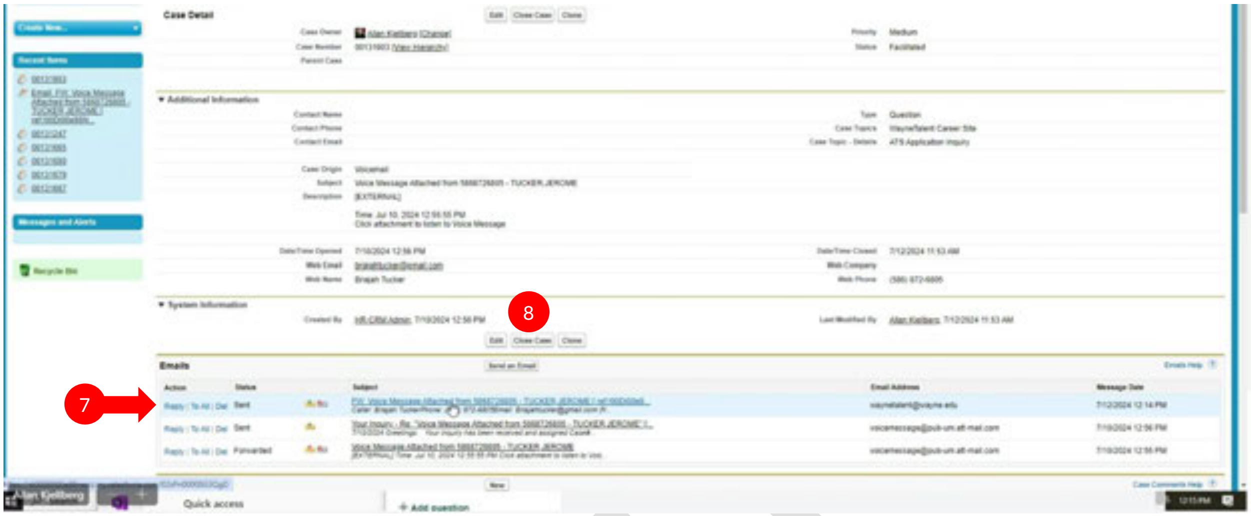
2. The “From” address should be AskHR@wayne.edu – change if needed.
3. Enter the email account for anyone the email should be forwarded to. ***NOTE:*** *Based on the user’s settings, the user may default as a BCC to receive a copy of the email.*
4. Add context in the Body section.



5. In the HTML Email Format view, click the “Preview” button to view before sending.
6. Click the “Send” button.

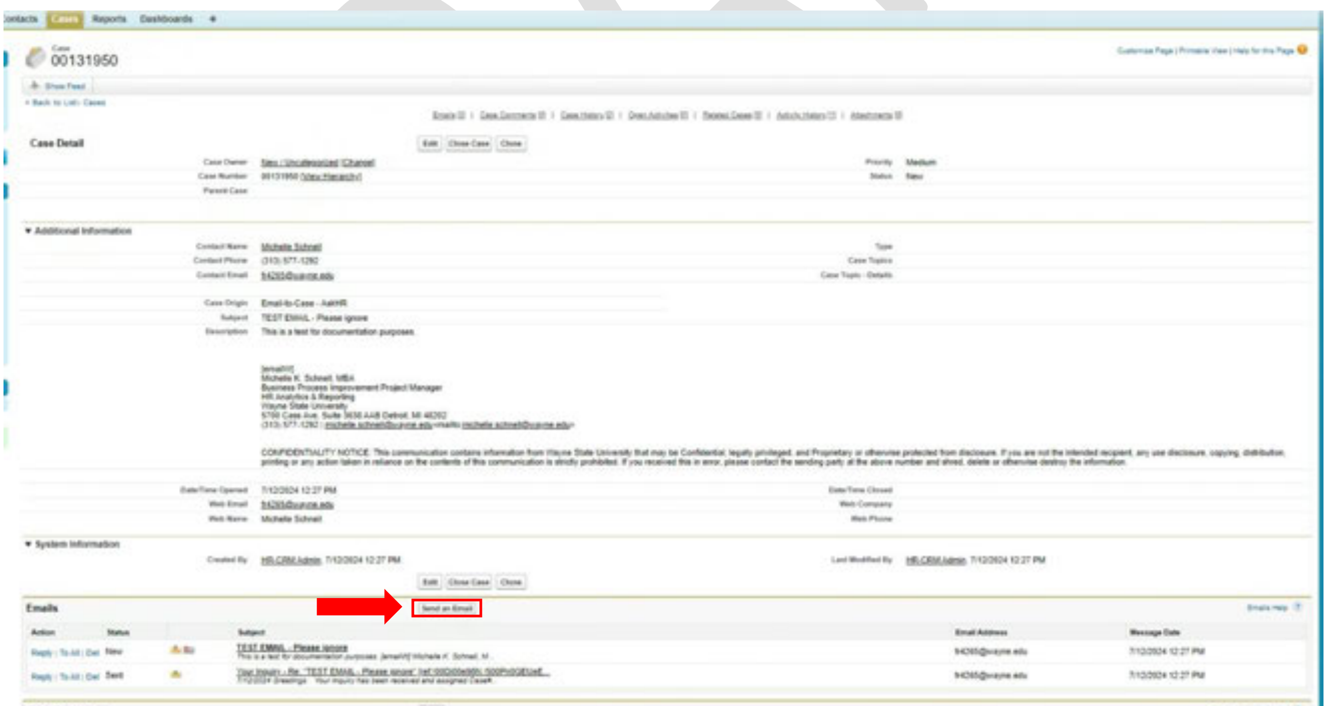


7. After sending, the Emails section refreshes showing the email that was just sent.
8. If the case was forwarded to a non-HRCRM user for solution, click the Close Case button and select "Facilitated" – see "Closing a Case."



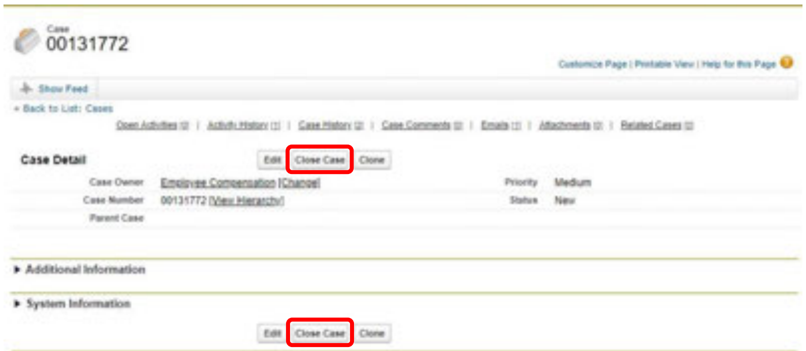
Send an Email

The "Send an Email" button is also available within a Case. "Send an Email" creates a new message that includes a reference to the case number but ***does not*** include additional case information or previous email message content. ***NOTE:*** *When Facilitating a Case, the preferred method is to forward the original Case email.*

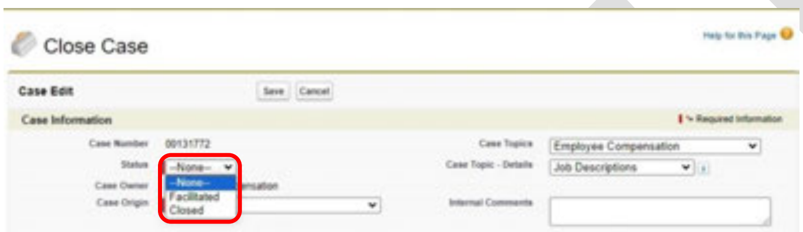


Closing a Case

1. To close a case, open the desired case and click either "Close Case" button, as shown below.



2. A Close Case edit screen will display.



3. Select "Facilitated" or "Closed" from the **Status** dropdown list.
   - **Facilitated:** select when a case is assigned to an individual or group email account that is not in the HRCRM system and no further action is to be taken by an HRCRM user.
     - ***<u>Best practice:</u>*** *forward the email for facilitation to the individual or group email account that is not part of the HRCRM, requesting they address the inquiry directly with the client and copy askHR@wayne.edu (or other email account that is setup for "Email-to-Case" processing in the HRCRM) with the resolution.*
   - **Closed**: select when a case has been resolved – the client issue has been addressed and there is no further action to be taken by an HRCRM user.

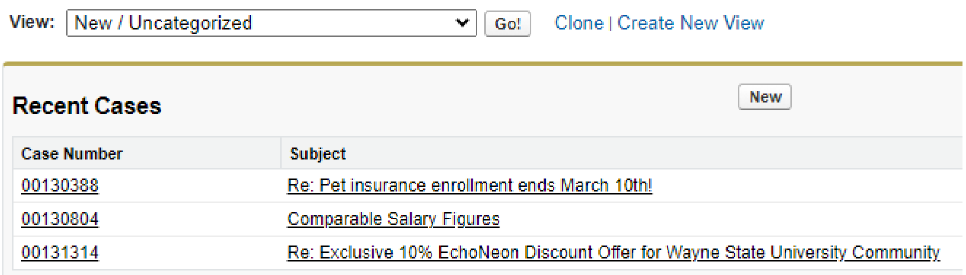
4. Enter additional information as necessary, such as Internal Comments. Click the "Save" button.

Case Views

Case Views can be used to filter the list of cases that are displayed. By default, recent cases are shown below the **View** field.

Select an option from the **View** dropdown list and click "**Go!**" to refresh the list.

Click "Create New View" to customize a new view filter for your specific use.



User Dashboard and Setup

Dashboards are displayed on the Home page. Users can customize their dashboard view by clicking their user name near the top right of the screen and selecting "Setup."