

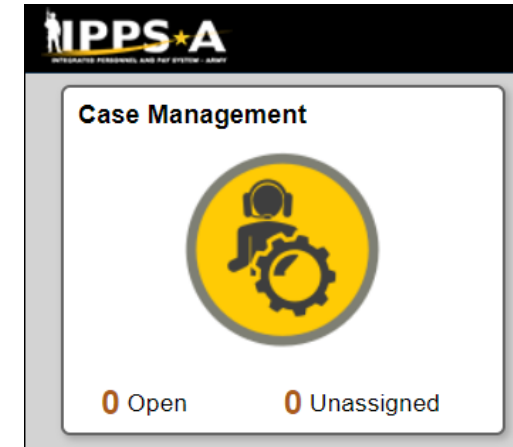
Customer Relationship Management

CRM

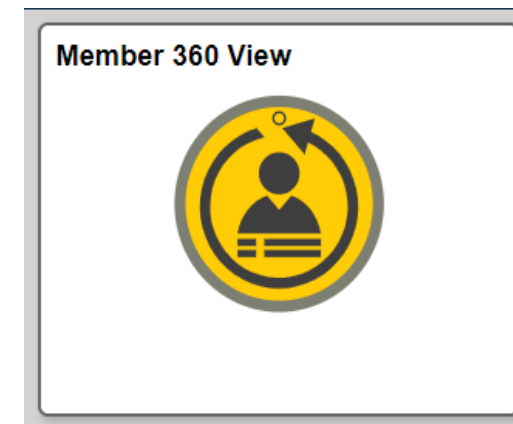
HOW TO CREATE A CRM

CREATE A CRM

- Click on the Case Management Application

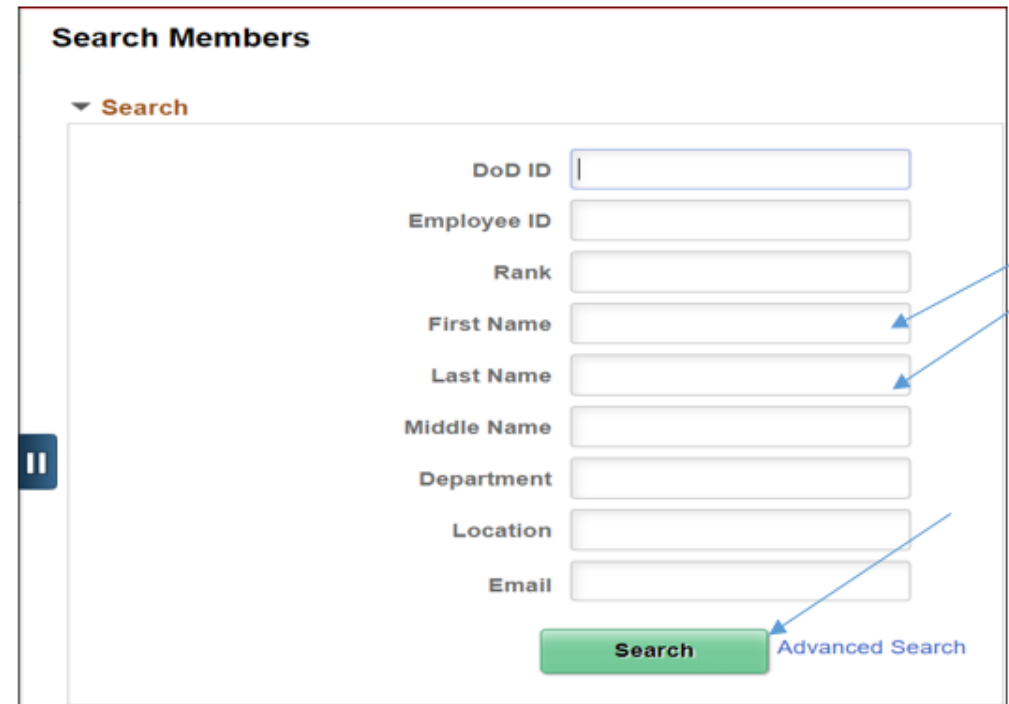


- Click on Member 360 View



CREATE A CRM

- Enter Soldier's Last Name, First Name
- Click Search Button
- Once the SM's name appears, click on their name



The screenshot shows a web form titled "Search Members". At the top left, there is a "Search" dropdown menu. Below it, a list of search criteria is provided, each with an input field: DoD ID, Employee ID, Rank, First Name, Last Name, Middle Name, Department, Location, and Email. A green "Search" button is located at the bottom left of the form, and a blue "Advanced Search" link is at the bottom right. Three blue arrows point to the "First Name", "Last Name", and "Advanced Search" elements.

CREATE A CRM

- Click the drop-down in the “Actions” filed (Top right)
- Select “Add IPPS-A Help Center Case”
- Click Go

Actions

Duty Status Present for Duty
Employee ID 0002529495
Date of Birth 09/17/1980
Home Address
Emergency Contact

Figure 7-1 GAARNG G-1/HR Actions Branch OPB, 1 October 2024

SUBMITTING PACKETS TO G-1 OPB

Member Information

Member **MAJ JOHN SMITH**

Department Army Element Joint Force Headq

Location W8AMAA MARIETTA GA

Contact Method 404/683-7540 [Edit](#)

Reported By [Search](#)

[Show Details](#)

[Search Again](#)

Case Information

*Business Unit

Quick Code

*Case Visibility

*Case Status

[Suggest a Provider Group](#)

*Provider Group [Search](#) [Add](#) [Remove](#)

Assigned To [Search](#) [Add](#) [Remove](#)

Target Close Date

*Category

*Type

*Detail

*Priority

*Source

Survey Score

See "Naming Convention" Spread Sheet, "CRM" Tab

Do not assign to anyone.

Problem Information

*Problem Summary [Add](#)

Description [Add](#) [Remove](#)

Interested Parties

Name	Reason	
DEMETRIUS BROWN	Agent Access	Remove
MARQUITA STCYR	Agent Access	Remove

Add a Note

[Add](#)

Figure 7-1 GAARNG G-1/HR Actions Branch OPB, 1 October 2024

ADD DOCUMENT

- Click “Notes” Tab
- Do not add documents to the initial email.
- Click “Add Note”
- Then scroll down the page

Case Details
Solution (0)
Case Summary
Notes (1)
Tasks (0)
Case History
Related Cases (0)
Related Actions (0)
Interested Parties (1)

*Filter by Note Type * All *

Notes Summary

🗨️ 🔍
1-1 of 1

Select	Subject and Details	Note Type	Origin	To or From	Date Added	Added By
<input type="checkbox"/>	IPPS-A HR Help Center Case# 200430 assigned to the NGGA G-1 HR ACTIONS BRANCH OP This is an automated message. Please do not reply. Case #200430 for SFC Demetrius Brown has been assigned to the NGGA G-1 HR	Email	Automated	DEMETRIUS.J.BROWN.MIL@MAIL.MIL;SPENCER.T.JONES4.MIL@MAIL.MIL;DEMETR	08/27/2021 3:36PM GMT	MARQUITA ST
<input type="checkbox"/> Check All / Clear All						
<div style="display: flex; justify-content: center; gap: 10px;"> Email View Add Note </div>						

Save Case
Find Solutions

Audit History

Created	08/27/2021 3:36PM GMT	By	0002800956.01	MARQUITA STCYR
Modified	08/27/2021 3:36PM GMT	By	0002800956.01	MARQUITA STCYR

Save
Switch BU

🖨️ Print
🔍 Spell
📺 360 View
🔍 360 Search
✉️ Email
🔍 Search

Top of Page

Figure 7-1 GAARNG G-1/HR Actions Branch OPB, 1 October 2024

ACTIONS BRANCH OPB
 This is an automated message. Please do...

Email Automated MIL;SPENCER.T.JONES4.MIL@MAIL .MIL;DEMETR... 08/21/2021 GMT

Check All / Clear All

Add a Note

Added 08/27/2021 3:38PM
 *Subject DOCUMENTS

Details

B *I* U S

Note Information

*Visibility HR Visible
 Note Type Documentation
 Origin

[Add an Attachment](#)

Name

Click drop down and select "Documentation"

Click to add documents

- Type in the subject "Documents"

Figure 7-1 GAARNG G-1/HR Actions Branch OPB, 1 October 2024

- Document appears in attachments

Note Information

*Visibility: HR Visible
Note Type: Documentation
Origin: Internal

Contact Information

Member:

Attachments

File Name	Description	*Visibility	Added By	Date Added	
MAJ_SMITH,_JOHN_-_UVPM.pdf	<input type="text"/>	HR Visit	MARQUITA STCYR	08/27/2021 3:38PM	

[Add an Attachment](#)

▼ **Audit History**

Figure 7-1 GAARNG G-1/HR Actions Branch OPB, 1 October 2024

- Scroll to the top of page
- See “Documents” attachment in summary
- Save Case

Save | Switch BU | Print | Spell | 360 View | 360 Search | Email | Search

Case ID 200430 | Case Status C
 Employee ID 0002531532 | Member S
 Problem Summary UVP JFHQ O345 SMITH, JOHN | Contact Method 4

Case Details | Solution (0) | Case Summary | **Notes (2)** | Tasks (0) | Case History | Related Cases (0) | Related Ac

*Filter by Note Type * All *

Notes Summary

Select	Subject and Details	Note Type	Origin	To or F
<input type="checkbox"/>	DOCUMENTS	(Internal Only)	Documentation	Internal
<input type="checkbox"/>	IPPS-A HR Help Center Case# 200430 assigned to the NGGA G-1 HR ACTIONS BRANCH OP This is an automated message. Please do...	Email	Automated	DEMET MIL;SP .MIL;DE

Check All / Clear All

Email | View | Add Note

Do not add documents to the initial email. You will not be able to delete documents if you need to make corrections.

Figure 7-1 GAARNG G-1/HR Actions Branch OPB, 1 October 2024