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Panel Head Review
Salesforce Training Plan
(Agenda for Training Videos)
February 2024

Training Plan

1. Review Portal Submission process
2. Getting Started
 - The Homepage
 - Navigation
 - Customizing Tab Order
3. View and Locate Expertises
 - List Views
 - Selecting
 - Pinning
 - Searching (search box)
 - Global Search box
 - Recent Items
 - Specific Searches for Expertises, Contacts, Etc.
 - Advanced Searching
4. Expertise

Insurance team receives an email notification

 - Select application from the “panel review” list view (Attorney)
 - Intro to Related List and expertise page layout
 - After a vendor becomes active, we send an email requesting that they provide additional information.
 - Hover Contact (Open Contact & Account)
 - Attached Files
 - Notes
 - Panel related object - NOTE: each panel has its own reviewer
 - Panel review button
 - if yes,
 - Notification sent to the vendor
 - The application will automatically be sent to the next step
 - If no,
 - Notification sent, Additional Rejection Notes to Vendor field will display for the vendor
 - Vendor receives an email with instructions to correct and resubmit.
 - When resubmitted, the application will display in the Resubmitted list view.