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CSM Design Document

- **Module 3: Everyday Case Management Scenarios**

- **Lesson 1: Customizing a Personal List**

- **Learning Objectives:**

- By the end of this lesson, learners will be able to create and personalize a list using available filters and conditions to accurately organize records and surface relevant results based on defined criteria.

Scene	Audio	On-Screen	Developer Callouts	Interactions & Assessments
	<i>This section contains the script used for audio narration on the slide.</i>	<i>This section describes all text, visuals, and UI elements that appear on screen.</i>	<i>This section provides implementation notes and guidance for the developer.</i>	<i>This section outlines any learner interactions or knowledge checks used to evaluate understanding.</i>
Slide 1: Introduction	<p>When you're managing multiple accounts, your records can pile up quickly. Scrolling through everything just to find what matters most slows you down.</p> <p>That's where lists help.</p> <p>Lists let you organize records in a way that works for you. Instead of viewing everything at once, you can create a focused view that surfaces only the records you care about, right when you need them.</p>		<p>To Dev: This is the intro audio to the interaction. Include visual call outs (Stock video of employee on the computer looking stressed, etc.)</p> 	
Slide 2: Hotspot Walkthrough: Customizing a Personal List			<p>Hotspot Walkthrough in Storyline.</p> <p>Sample Screenshots.</p> <p>To Dev: Include visual callouts, like pulsating icons to guide the learner through the steps.</p>	<p>To begin, select the menu icon in the upper-left corner of the screen.</p> <p>From the navigation panel, choose Saved Lists.</p> <p>Select Add new list to open the New List window.</p>

Whenever the learner clicks on the correct step, trigger the context audio or guiding audio for next steps.

The Create from existing tab is selected by default. This option lets you build a new list using an existing list as your starting point.

Click into the **List*** dropdown.

From the menu, scroll to the Records section and select **All**.

This gives you a full starting set to refine.

Next, click into the **List Name*** field.

Enter a name that clearly describes what this list will show. For example, you might use an account name or something like My Open Records.

A list name has been entered for you.

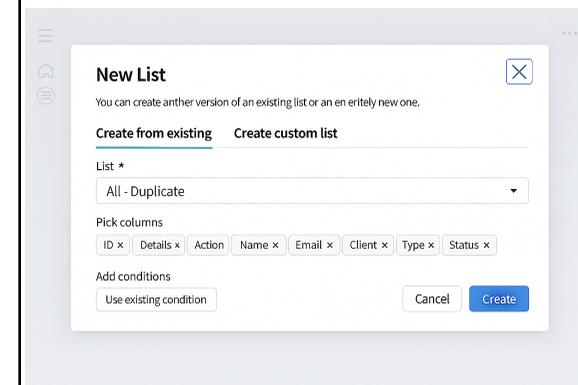
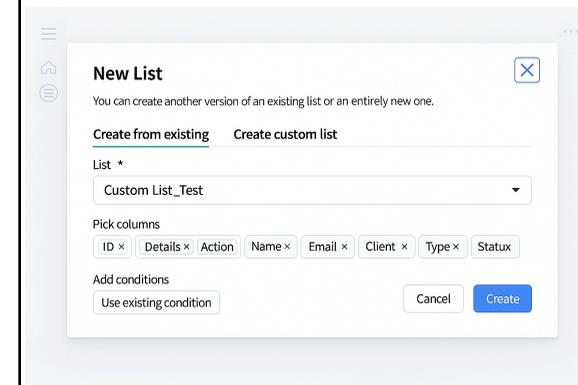
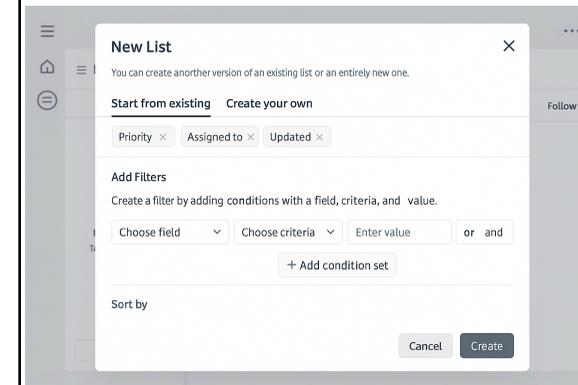
Scroll down to the Add conditions section.

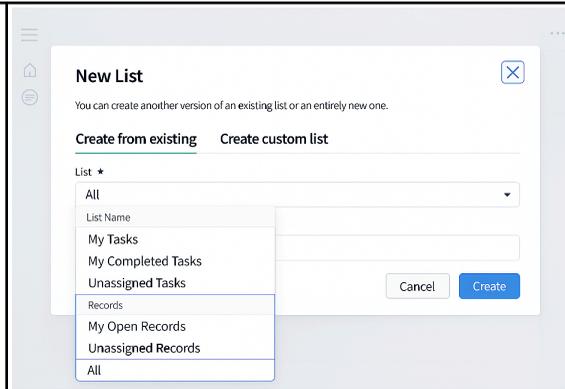
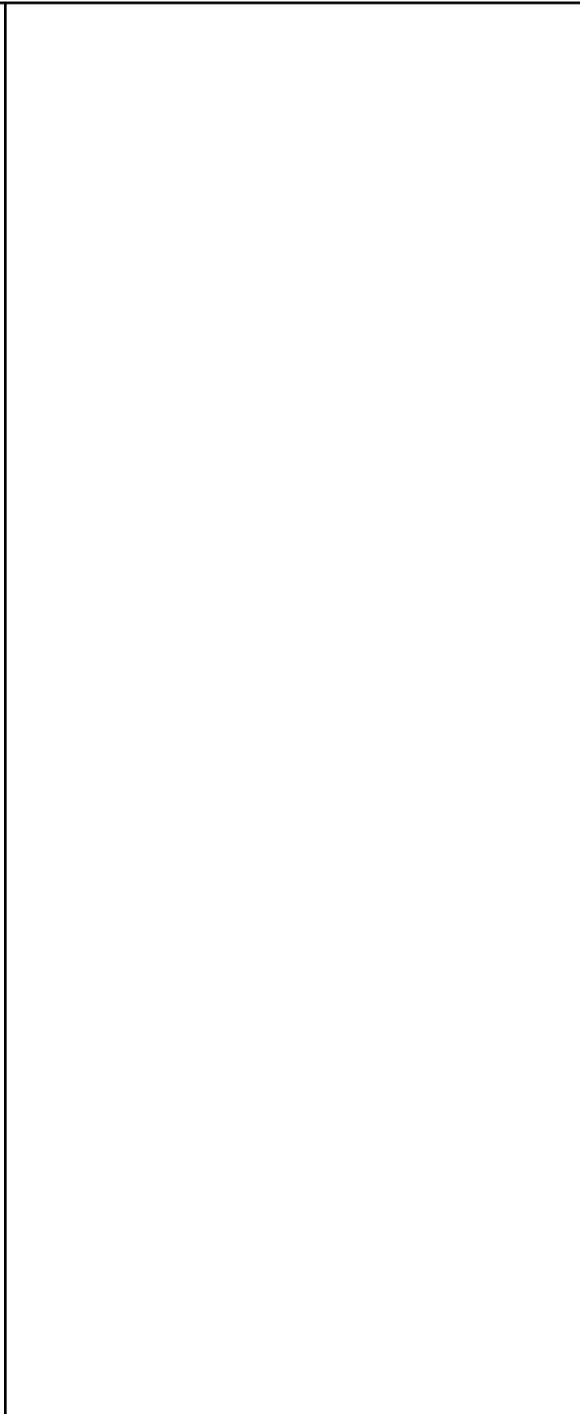
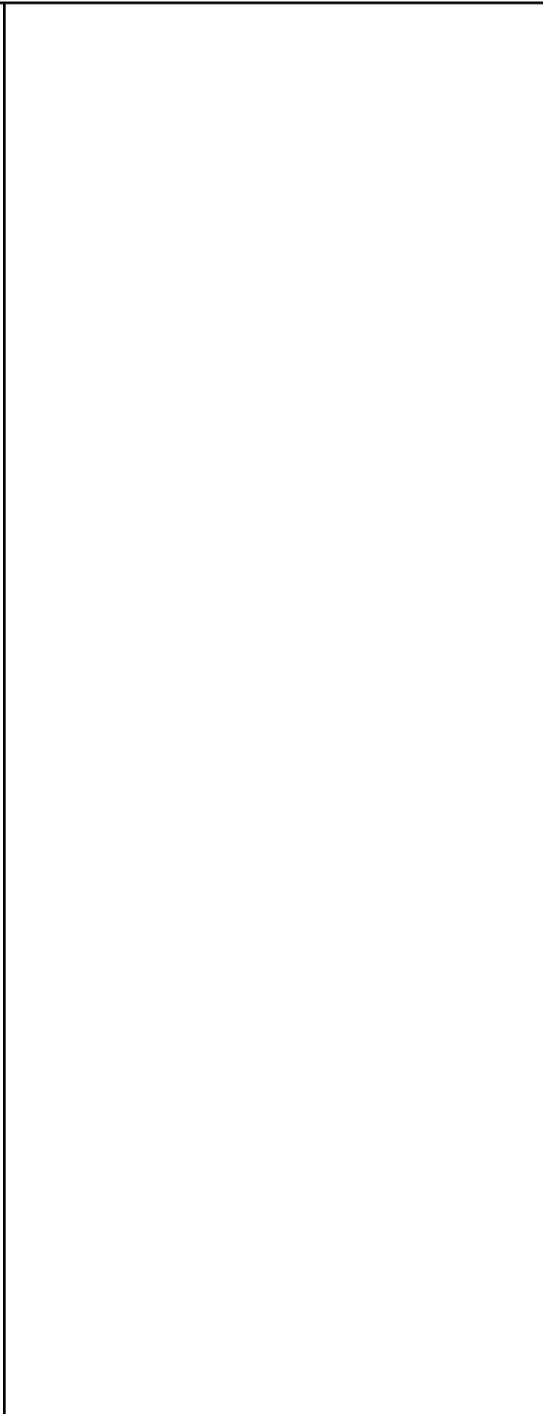
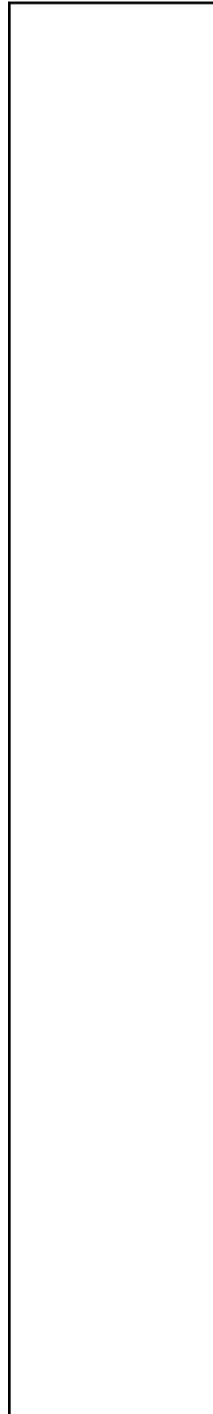
This is where you narrow down what appears in your list.

Select **Use existing condition** to begin.

For the first condition, choose **Account** as the attribute you want to filter by.

The comparison option is already set to a default value, so you can leave it as is.

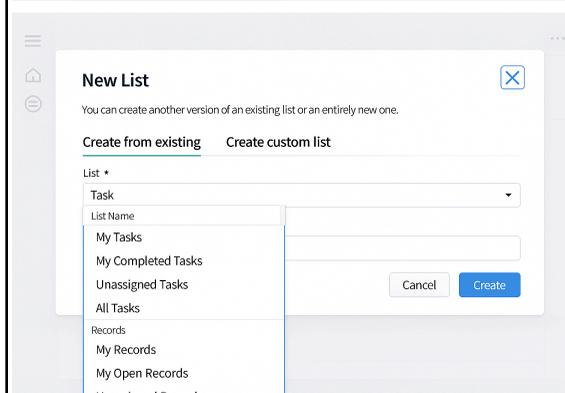




In the value field, start typing an account name to search. An example account name has been entered for you.

Select **Greenwood Gables** from the results.

To include more than one account, select **Or**.



Repeat the same steps to add additional Greenwood Gables accounts. These have been added for you.

To apply another rule, select **And**.

Choose the next attribute you want to filter by.

Type **status** into the search field, then select **Status** from the list.

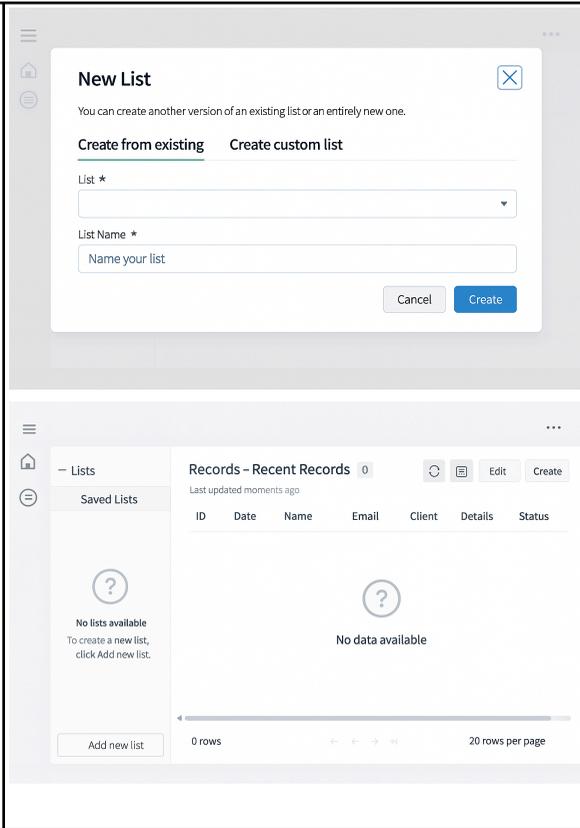
If you only want to see records that are still active, you can exclude completed ones.

From the comparison options, select **excludes**.

Select **Completed**, then add **Finalized and Voided**.

This ensures only open records remain visible.

Once your conditions are set, select **Create** to save the list.

			 <p>The top screenshot shows a 'New List' dialog box with options to 'Create from existing' or 'Create custom list'. It includes a dropdown for 'List *', a text input for 'List Name *', and 'Cancel' and 'Create' buttons.</p> <p>The bottom screenshot shows a 'Lists' table view with a 'Saved Lists' sidebar and a 'Records - Recent Records' table. The table has columns for ID, Date, Name, Email, Client, Details, and Status. Both the sidebar and the table area show 'No lists available' or 'No data available' messages.</p>	<p>If you have more than one saved list, you can rearrange them.</p> <p>Select Reorganize, then drag your new list into the position you prefer.</p> <p>In this example, the list has been moved to the top.</p> <p>Select Done to save the order.</p>
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<p>Slide 3: Hotspot Walkthrough: Adjusting Columns</p>				<p>To customize how your records display, select the settings icon in the top-right corner, then choose Edit Columns.</p> <p>From here, you can show or hide columns by selecting or clearing checkboxes.</p> <p>Select Account Location to add that column.</p> <p>Clear Active Escalation to remove it.</p> <p>You can also drag columns on the right to change their order.</p>
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				<p>Select OK to apply your changes.</p> <p>Once saved, your list is always available and automatically loads when you sign in.</p> <p>You can create different lists for different accounts, or set up one that shows only your open records.</p> <p>With lists, it's easier to stay organized, focus on priority work, and find what you need without extra steps.</p>
<p>Slide 4: Conclusion</p>	<p>You've successfully created a new list.</p> <p>Lists help you stay focused by showing only the records that matter most to you.</p> <p>You can build different lists for different accounts, narrow results by status, and tailor your columns to match how you work.</p> <p>Using lists gives you more control over your workspace and helps you work more efficiently every day.</p>		<p><i>To Dev: This is the concluding audio to the interaction. Include visual call outs (a list icon, workspace icon, stock photo of productive workers, etc.)</i></p>	