



posco
INTERNATIONAL

POSCO International CRM Innovation TF

User Manual_Common&Master

2025. 10

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DX

Step 1

Menu



1. Menu

1.1 Menu Selection

Step 2

Notice



1. Notice Inquiry

1.1 Popup Notification

1.2 Dashboard View

1.3 List View

Step 3

News

- ▶ 1. News Management
 - 1.1 News Registration
 - 1.2 News Modification
- ▶ 2. News Inquiry
 - 2.1 Dashboard View
 - 2.2 List View

Step 4

Change Owner

- ▶ 1. Record Transfer
 - 1.1 Record Transfer

Step 1. Menu

Step (Lv.2)	1. Menu	Step (Lv.3)	1.1 Menu Selection
Menu	Home	User	All Users
Navigation	Home		

The screenshot shows the Steel CRM Home screen. The top navigation bar includes 'Steel CRM', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Meeting Memo', 'Credit Mgmt.', 'Order', 'Order Monitoring', 'Ordershipping', and 'More'. The 'App Launcher' is open, showing a search bar and a list of apps: 'CRM' and 'Steel CRM'. The 'News' section displays a table of market news. The 'My Order Unmapped List' section is empty. The 'My Meeting Memo' section shows counts for 'Today', 'Weekly', and 'Monthly'. The 'Latest Meeting Memo by Department' section is empty. The 'Recently Changed Account' and 'Recently Changed Contact' sections are also empty. The bottom of the screen shows filters for 'Account', 'Date', 'Department', and 'Modifier'.

1. Click [:::] in the upper left corner of the Home screen

2. Select the required Apps from [App Launcher]

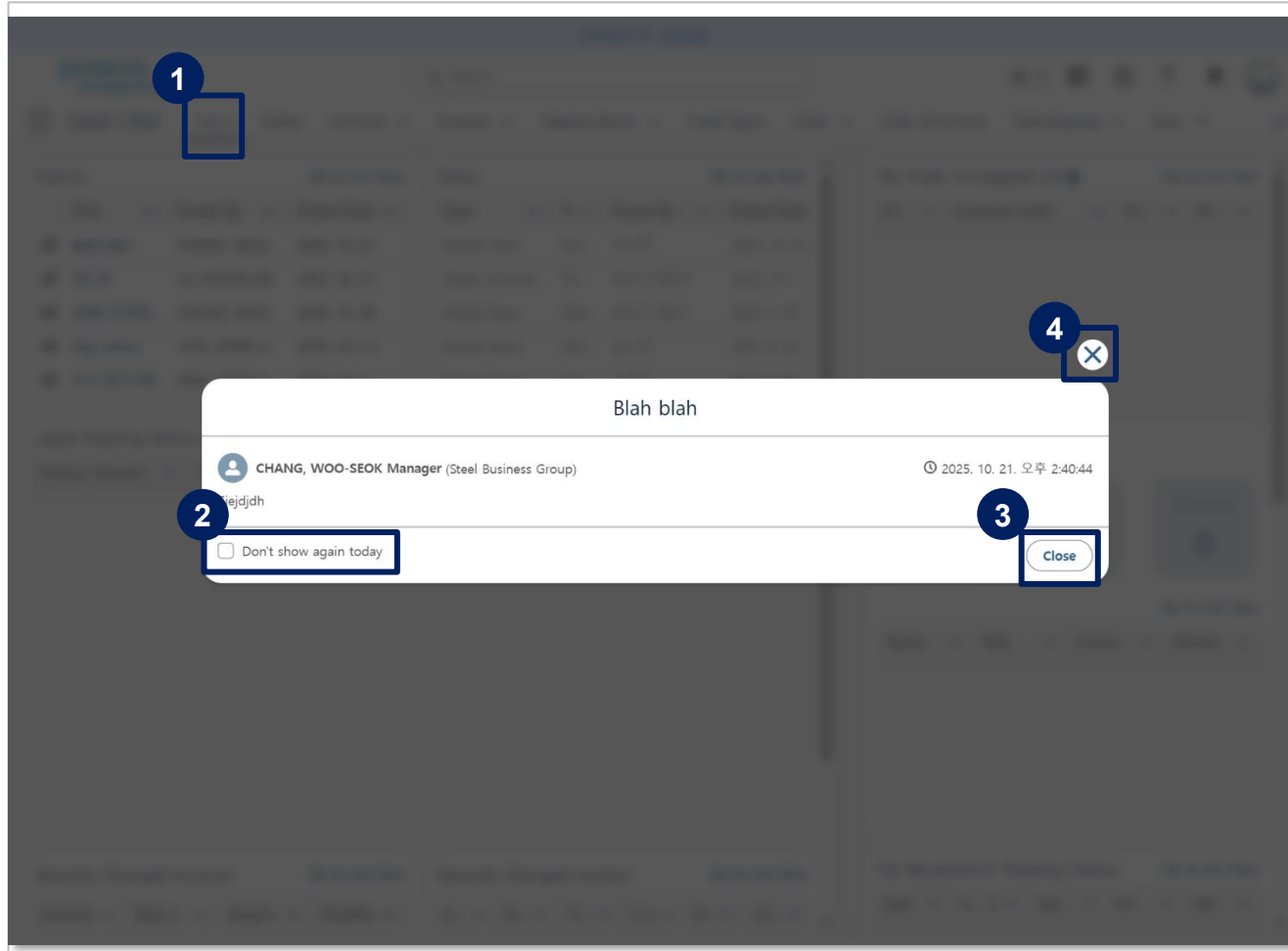
1. Click [:::] in the upper left corner of the Home screen

1. Select the required Apps from [App Launcher]

Steel division users are recommended to use Steel CRM, while other users are recommended to use CRM App.

Step 2. Notice

Step (Lv.2)	1. Notice Inquiry	Step (Lv.3)	1.1 Notice Popup
Menu	Home	User	All Users
Navigation	Home		



1. Click [Home] menu
2. [Don't show again today] option
The popup will not open for 24 hours from the time the option is selected.
3. Close popup
4. Close popup

Step 2. Notice

Step (Lv.2)	1. Notice Inquiry	Step (Lv.3)	1.2 Dashboard View
Menu	Home	User	All Users
Navigation	Home		

Sandbox: fs | Log out

posco INTERNATIONAL

Search...

Steel CRM Home Chatter Accounts Contacts Meeting Memo Credit Mgmt. Order Order Monitoring Ordershipping More

1

2

Notice Go to List View

Title	Posted By	Posted Date
Blah blah	CHANG, WOO...	2025. 10. 21.
테스트	JU, KYUNG-JIN	2025. 10. 21.
APEC 정상회...	CHANG, WOO...	2025. 10. 20.
Eng notice	HAN, SANG-H...	2025. 10. 14.
전자 공지사항	HAN, SANG-H...	2025. 10. 1.

News Go to List View

Type	T.	Posted By	Posted Date
Market News	Mo...	백성문	2025. 10. 23.
Global Informat...	해...	WIN11.TEST2	2025. 10. 1.
Market News	Sale...	WIN11.TEST1	2025. 9. 29.
Market News	250...	김두양	2025. 9. 29.
Market News	Mar...	김민주	2025. 9. 29.

My Order Unmapped List Go to List View

Or...	Customer Code	Cu...	Or...

Latest Meeting Memo by Department Go to List View

Primary Account	Title	Primary Type	Meeting Date	Created By

My Meeting Memo

Today 0 Weekly 0 Monthly 0

Go to List View

Status	Title	Primar...	Meetin...

Recently Changed Account Go to List View

Account	Date	Depart...	Modifier

Recently Changed Contact Go to List View

A...	N...	Ti...	C ↓	D...	M...

My Recipient/CC Meeting Memo Go to List View

Type	S... ↓	Me...	Pri...	Me...

1. Click [Home] menu

2. Check announcements on the dashboard

Step 2. Notice

Step (Lv.2)	1. Notice Inquiry	Step (Lv.3)	1.3 List View (1/2)
Menu	Notice	User	All Users
Navigation	Notice > All		

Sandbox: fs | Log out

We Find Answers Planet Wide

Q Search...

1

* All / Notice

Steel CRM

Home Chatter Accounts Contacts Meeting Memo Credit Mgmt. Order Order Monitoring

Notice

All

11 items • Sorted by No • Updated a few seconds ago

Q Search this list...

		Type	Title	Posted By
1	202508-0005	System Notice	Meeting Memo User Manual	Migration
2	202508-0006	System Notice	Account, Contact User MAnual	Migration
3	202510-0009		전사 공지사항	HAN, SANG-HUN
4	202510-0010		공지사항_시스템 관리자 테스트_ENG	HA, SUNG-WOO
5	202510-0011		2025-10-13 Notice	HAN, SANG-HUN
6	202510-0012		2025-10-14 System Notice	HAN, SANG-HUN
7	202510-0013		Eng notice	HAN, SANG-HUN
8	202510-0014		APEC 정상회담 임박	CHANG, WOO-SEOK
9	202510-0015		공지 테스트	JU, KYUNG-JIN
10	202510-0016		테스트	JU, KYUNG-JIN
11	202510-0017		Blah blah	CHANG, WOO-SEOK

1. Click [Notice] menu
2. View Notice list
3. Click notice number to navigate to detail page

Step 2. Notice

Step (Lv.2)	1. Notice Inquiry	Step (Lv.3)	1.3 List View (2/2)
Menu	Notice	User	All Users
Navigation	Notice > All		

Sandbox: fs | Log out

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Q Search...

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Steel CRM Home Chatter Accounts Contacts Meeting Memo Credit Mgmt. Order Order Monitoring * 202508-0005 / Notice X More

1

Notice
202508-0005

2

Details

Information

Title (Eng)

Meeting Memo User Manual

Content (Eng)

Attached is the Meeting Notes user manual, effective August 29th.

Please refer to the attached file.

System Information

Owner

Migration

Created By

Migration

2025. 8. 28. PM 6:33

Last Modified By

Migration

2025. 8. 28. PM 6:35

Activity

Filters: All time • All activities • All types ⚙

Refresh Expand All View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Files (1)

P_INTL_매뉴얼_미팅메모_250828

2025. 8. 28 • 1.7MB • pdf

View All

1. Notice number

2. Details

Step 3. News

Step (Lv.2)	1. News Management	Step (Lv.3)	1.1 News Registration (1/2)
Menu	News	User	All Users
Navigation	News > All		

Sandbox: fs | Log out

Steel CRM
Home
Chatter
Accounts
Contacts
Meeting Memo
Credit Mgmt.
Order
Order Monitoring

1

* All | Notice

X

* More

News

Recently Viewed

4 items • Updated a few seconds ago

2

New

No	Type	Title	Posted By	Posted Date	Created By
1 202510-0014	Market News	Bloomenergy valuation skyrockets	CHANG, WOO-SEOK	2025. 10. 21.	장우석
2 202510-0015	Market News	Mobile News Test #1	백성문	2025. 10. 23.	백성문
3 202509-0003	Market News	SalesRep 시황뉴스 test	WIN11.TEST1	2025. 9. 29.	원11테스트1
4 202509-0000	Market News	Market News TEST(0929)_News	김민주	2025. 9. 29.	김민주

1. Click [News] menu
2. Click [New] button

9

Step 3. News

Step (Lv.2)	1. News Management	Step (Lv.3)	1.1 News Registration (2/2)
Menu	News	User	All Users
Navigation	News > All > New News		

- 1. Select Type (* Required)**
Category: Market News, News Clipping, Global Information
- 2. Enter Title (* Required)**
- 3. Enter Title (English)**
- 4. Enter Content**
- 5. Enter Content (English)**
- 6. Cancel, Save & New, Save**

Step 3. News

Step (Lv.2)	1. News Management	Step (Lv.3)	1.2 News Modification (1/2)
Menu	News	User	All Users
Navigation	News > All		

Sandbox: fs | Log out

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Planet A World

Q Search...

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Steel CRM

Home

Chatter

Accounts

Contacts

Meeting Memo

Credit Mgmt.

Order

* 202510-0015 | News

* More

News

🔔

Recently Viewed

👤

New

4 items • Updated a minute ago

Q Search this list...

⚙️

📄

🔄

🔄

✎

🗑️

⌵

<input type="checkbox"/>	No	Type	Title	Posted By	Posted Date	Cr	
1	<input type="checkbox"/> 202510-0015	Market News	Mobile News Test #1	백성문	2025. 10. 23.	백성문	<div>1</div> <div>Edit</div>
2	<input type="checkbox"/> 202510-0014	Market News	Bloomenergy valuation skyrockets	CHANG, WOO-SEOK	2025. 10. 21.	장우석	<div>Delete</div>
3	<input type="checkbox"/> 202509-0003	Market News	SalesRep 시황뉴스 test	WIN11.TEST1	2025. 9. 29.	원11테스	<div>Change Owner</div>
4	<input type="checkbox"/> 202509-0000	Market News	Market News TEST(0929)_News	김민주	2025. 9. 29.	김민주	<div>Edit Labels</div>

1. Click item menu in news list > [Edit]
 Users can only edit or delete their own news

Step 3. News

Step (Lv.2)	1. News Management	Step (Lv.3)	1.2 News Modification (2/2)
Menu	News	User	All Users
Navigation	News > All		

Sandbox: fs | Log out

Edit 202510-0015

* = Required Information

Information

*Type: Market News

*Title: 모바일 뉴스 등록 테스트 #1

Title (Eng): Mobile News Test #1

Content: Salesforce Sans 12 B I U S [List Icons] [Link Icon] [Image Icon] [Link Icon]

Content (Eng): Salesforce Sans 12 B I U S [List Icons] [Link Icon] [Image Icon] [Link Icon]

System Information

Created By: [User] 2025-10-23 PM 3:16

Last Modified By: [User] 2025-10-23 PM 3:22

Buttons: Cancel, Save & New, Save

- 1. Select Type (* Required)**
Category: Market News, News Clipping, Global Information
- 2. Enter Title (* Required)**
- 3. Enter Title (English)**
- 4. Enter Content**
- 5. Enter Content (English)**
- 6. Cancel, Save & New, Save**

Step 3. News

Step (Lv.2)	2. News Inquiry	Step (Lv.3)	2.1 Dashboard View
Menu	Home	User	All Users
Navigation	Home		

The screenshot shows the Posco International Steel CRM dashboard. The top navigation bar includes a search bar, user profile, and various icons. The main menu on the left has 'Home' highlighted with a red box and numbered 1. The 'News' section in the center is highlighted with a red box and numbered 2. It contains a table with columns: Type, T., Posted By, and Posted Date. The table lists several news items, including 'Market News', 'Global Informat...', 'Market News', 'Market News', and 'Market News'. Other sections visible include 'Notice', 'My Order Unmapped List', 'My Meeting Memo', 'Latest Meeting Memo by Department', 'Recently Changed Account', 'Recently Changed Contact', and 'My Recipient/CC Meeting Memo'.

1. Click [Home] menu
2. Check news on the dashboard
Dashboard news visibility scope:
Domestic employees: Within the same division
Overseas employees: All scope

Step 3. News

Step (Lv.2)	2. News Inquiry	Step (Lv.3)	2.2 List View (1/2)
Menu	News	User	All Users
Navigation	News > All		

Sandbox: fs | Log out

Search...

Steel CRM Home Chatter Accounts Contacts Meeting Memo Credit Mgmt. Order Order Monitoring

News

All

14 items • Sorted by Posted Date • Updated a few seconds ago

No	Type	Title	Posted By	Posted D...
1 202510-0015	Market News	모바일 뉴스 등록 테스트 #1	백성문	2025. 10. 23.
2 202510-0014	Market News	볼륨에너지 PER 1500 돌파	CHANG, WOO-SEOK	2025. 10. 21.
3 202510-0013	Market News	테스트	JU, KYUNG-JIN	2025. 10. 21.
4 202510-0012	Market News	뉴스테스트	JU, KYUNG-JIN	2025. 10. 20.
5 202510-0011	Market News	한미 관세 불확실성 지속 (환율 0.9원 오른 1,422.1원 출발)	CHANG, WOO-SEOK	2025. 10. 20.
6 202510-0010	Market News	시황뉴스	HAN, SANG-HUN	2025. 10. 14.
7 202510-0009	Market News	2025-10-13 시황뉴스	HAN, SANG-HUN	2025. 10. 13.
8 202510-0008	Global Information	해외 실시간 정보	HAN, SANG-HUN	2025. 10. 13.
9 202510-0006	News Clipping	철강뉴스	HAN, SANG-HUN	2025. 10. 1.
10 202510-0005	News Clipping	포스코인터내셔널, 일본 오사카서 'K-스타트업 글로벌 진출지원' 진행	Sales Rep 2	2025. 10. 1.
11 202510-0004	Global Information	해외부문 SalesRep	WIN11.TEST2	2025. 10. 1.
12 202509-0003	Market News	SalesRep 시황뉴스 test	WIN11.TEST1	2025. 9. 29.
13 202509-0001	Market News	250926 철강원료 일일 시황	김두암	2025. 9. 29.
14 202509-0000	Market News	Market News TEST(0929)_News	김민주	2025. 9. 29.

1. Click [News] menu

2. View news list

List news visibility scope:

Domestic employees: All scope

Overseas employees: All scope

3. Click news number to navigate to detail page

Step 3. News

Step (Lv.2)	2. News Inquiry	Step (Lv.3)	2.2 List View (2/2)
Menu	News	User	All Users
Navigation	News > All		

Sandbox: fs | Log out

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Steel CRM

Home

Chatter

Accounts

Contacts

Meeting Memo

Credit Mgmt.

Order

Order Monitoring

* 202510-0015 | News

* More

News

202510-0015

EditCloneDelete

Details

Information

Type

Market News

Title

모바일 뉴스 등록 테스트 #1

Title (Eng)

Mobile News Test #1

Content

모바일 뉴스 등록 테스트입니다

Content (Eng)

System Information

Created By

백성문

2025. 10. 23. PM 7:16

Last Modified By

백성문

2025. 10. 23. PM 7:22

Activity

Filters: All time • All activities • All types

RefreshExpand AllView All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

DRM Decryption on Upload : On

Add Files

📁

No files attached.

1. News number

2. Details

Step 4. Change Owner

Step (Lv.2)	1. Record Transfer	Step (Lv.3)	1.1 Record Transfer
Menu	Change Owner	User	All Users
Navigation	Change Owner > Transfer		

The screenshot displays the POSCO CRM interface for the 'Change Owner' function. At the top, the 'Change Owner' menu item is highlighted in the navigation bar (1). Below this, the 'Change Owner' section is visible, featuring a dropdown menu for selecting the owner (2) and a 'Change' button (5). The main area shows a list of records to transfer (4), including categories like Meeting Memo, Account, Contact, and 철강 확정주문, each with a selection checkbox and a count of 0 items.

1. Click [Change Owner] menu
2. Set Owner / Change Owner
Owner: User who will transfer records (Default: Currently logged-in user)
Change Owner: User who will receive records (Search users after clicking text box)
3. Click [Search] button after setting Change Owner to retrieve transferable records
4. Select records to transfer in each category
5. Click [Change] button to transfer selected records

Step 1

Login

- ▶ 1. App Login
 - 1.1 App Login

Step 2

Menu

- ▶ 1. Menu
 - 1.1 Menu Selection

Step 3

Notice

- ▶ 1. Notice Inquiry
 - 1.1 List View

Step 4

News

- ▶ 1. News Inquiry
 - 1.1 List View
- ▶ 2. News Management
 - 2.1 News Registration
 - 2.2 News Modification

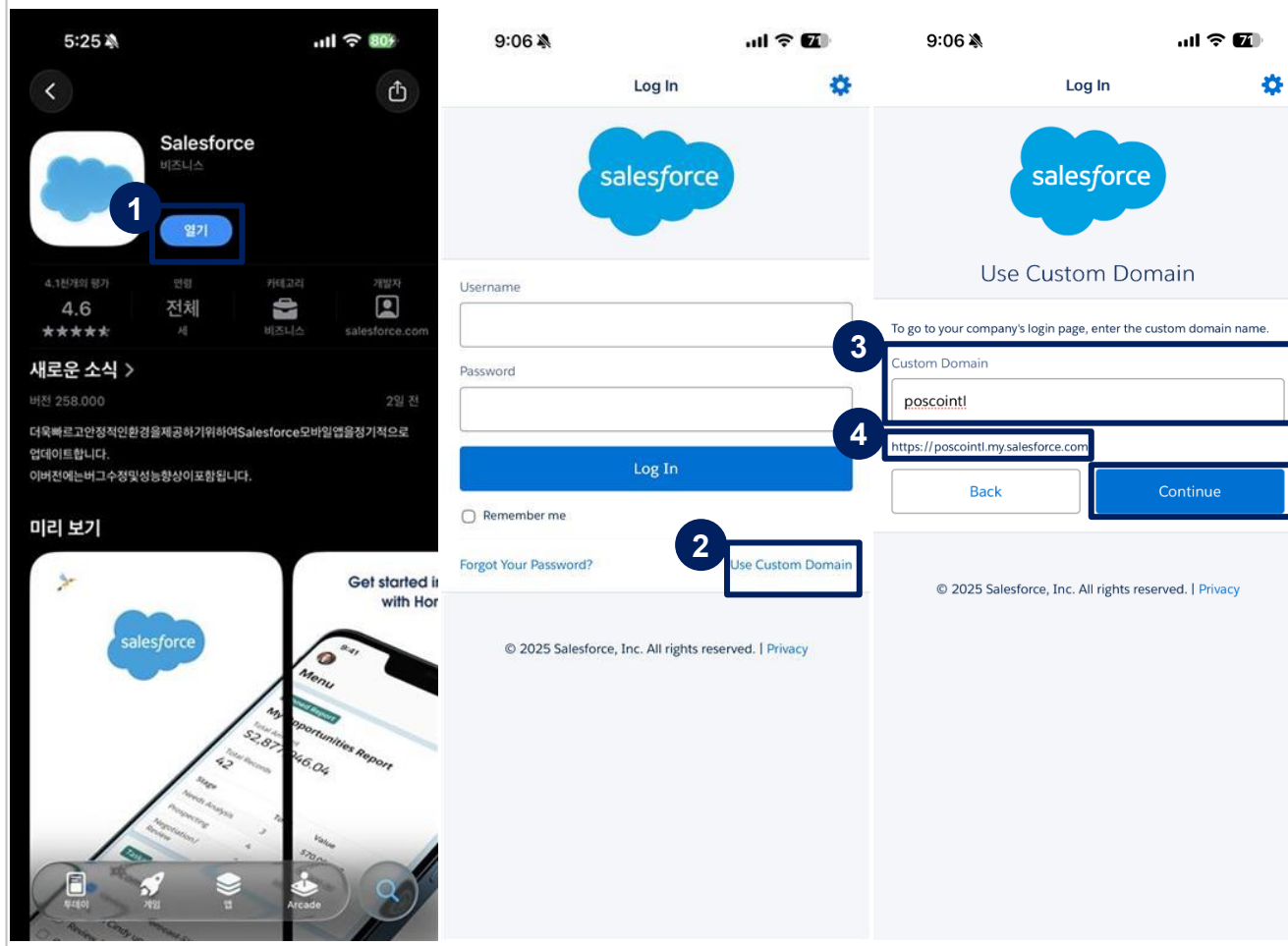
Step 5

Change Owner

- ▶ 1. Record Transfer
 - 1.1 Record Transfer

Step 1. Login

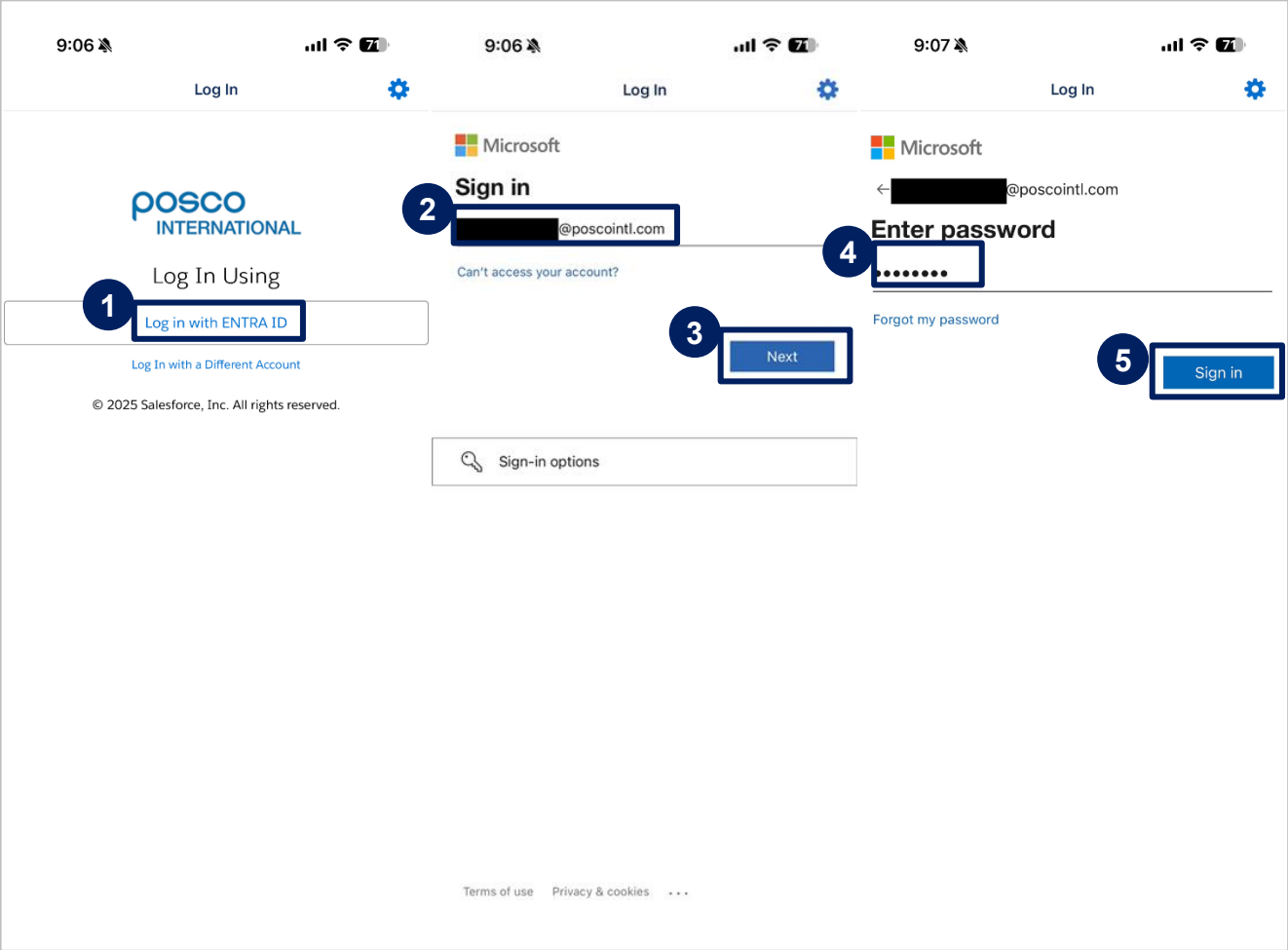
Step (Lv.2)	1. App Login	Step (Lv.3)	1.1 App Login(1/3)
Menu		User	All Users
Navigation			



1. Download 'Salesforce' from Apple App Store/Google Play Store and run
Apple App Store:
<https://apps.apple.com/kr/app/salesforce/id404249815>
Google Play Store:
https://play.google.com/store/apps/details?id=com.salesforce.chatter&pcampaignid=web_share
2. Click [Use Custom Domain] button
3. Enter 'poscointl' in the custom domain input field
4. Verify that the domain at the bottom changes to <https://poscointl.my.salesforce.com>
5. Click [Continue] button

Step 1. Login

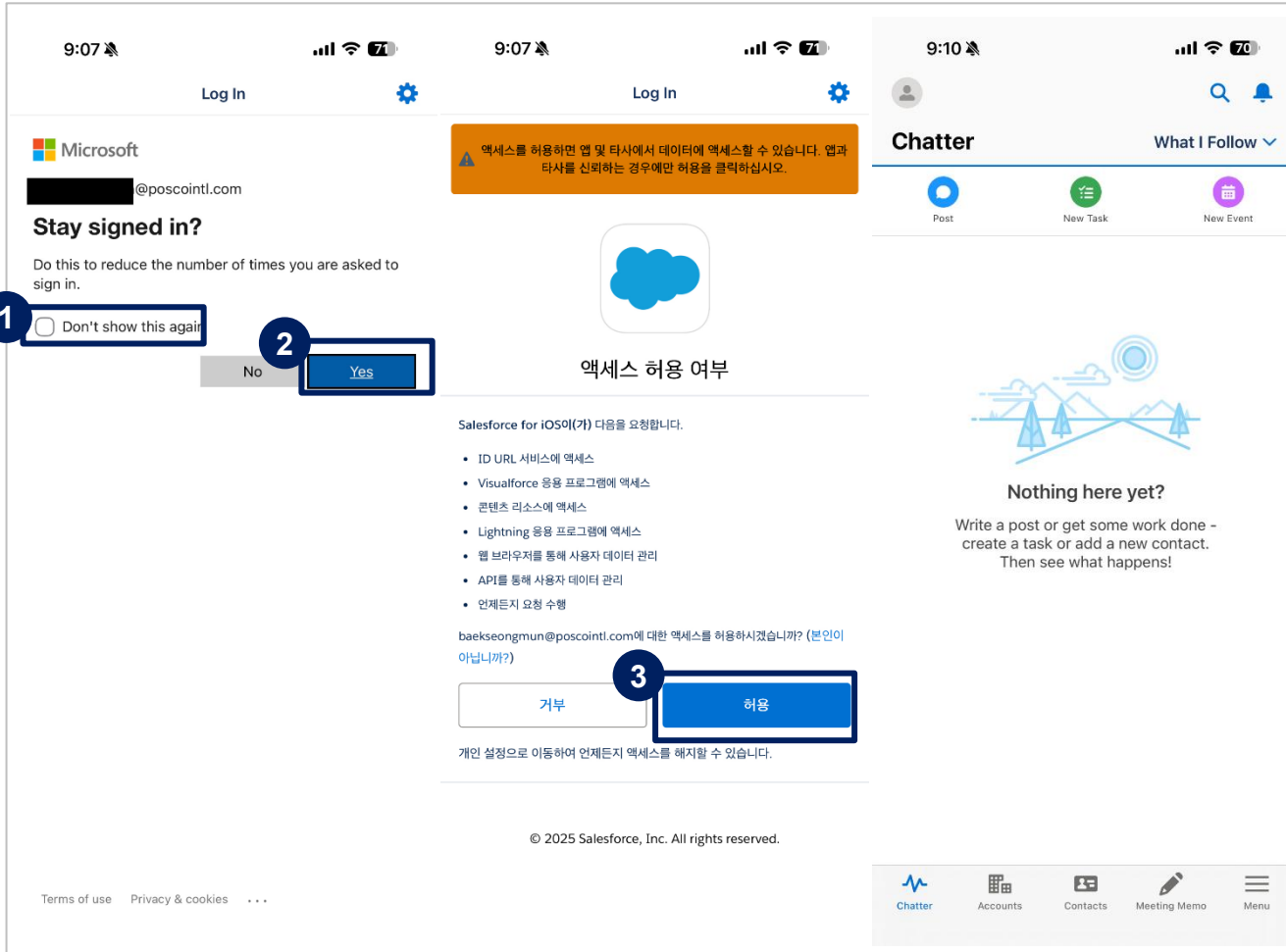
Step (Lv.2)	1. App Login	Step (Lv.3)	1.1 App Login(2/3)
Menu		User	All Users
Navigation			



1. Click [Login with ENTRA ID] button
2. Enter Entra ID
e.g. EP ID@poscointl.com
3. Click [Next] button
4. Enter Entra PW
e.g. EP PW
5. Click [Sign in] button

Step 1. Login

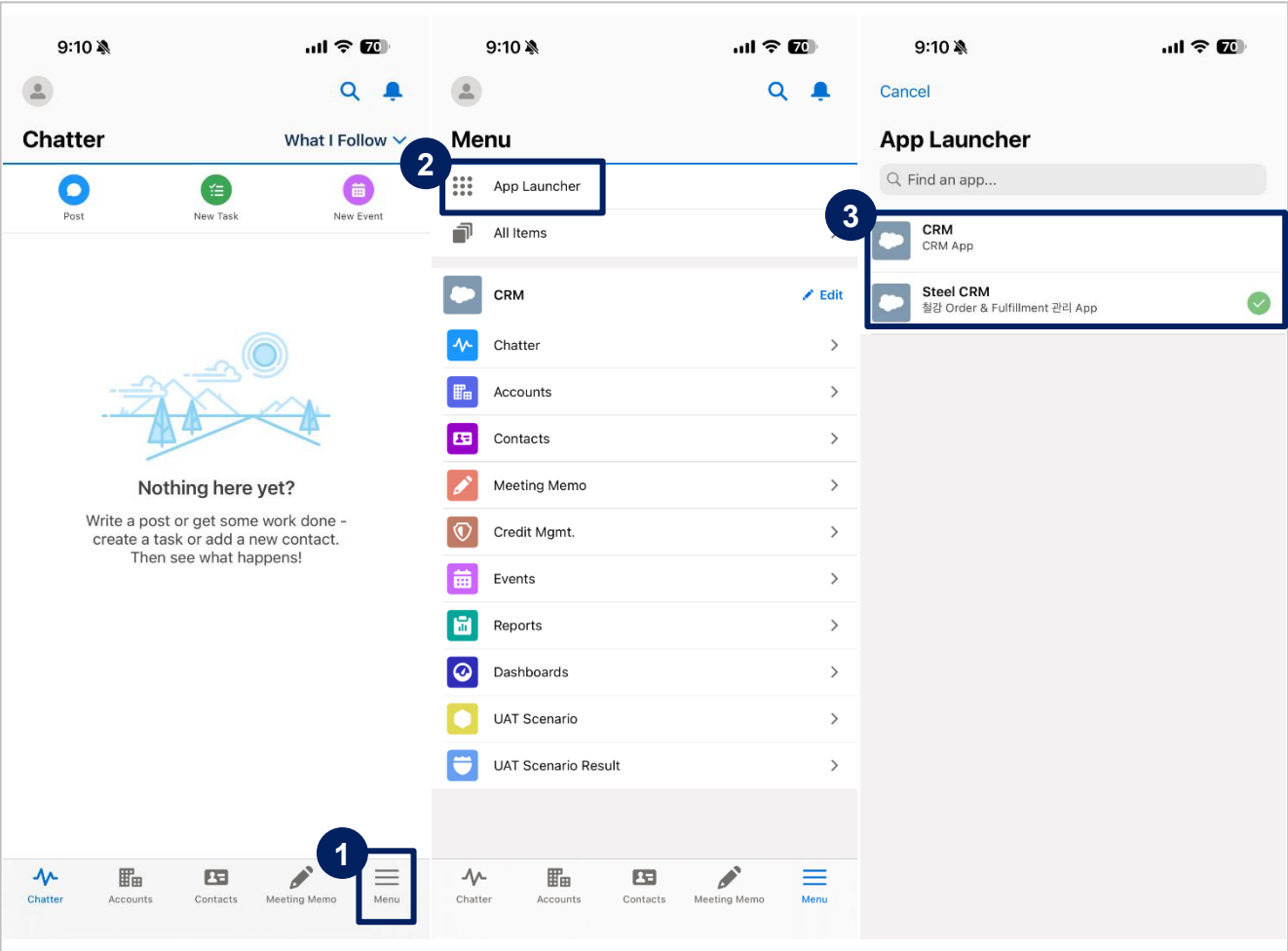
Step (Lv.2)	1. App Login	Step (Lv.3)	1.1 App Login(3/3)
Menu		User	All Users
Navigation			



1. When 'Don't show again' option is selected, this screen will not appear again in the current session
2. Clicking [Yes] button maintains the session even after closing the browser
3. Click [Allow] button to allow Salesforce for iOS access
If [Deny] is selected, Salesforce for iOS application cannot be used.
4. Login completed

Step 2. Menu

Step (Lv.2)	1. Menu	Step (Lv.3)	1.1 Menu Selection
Menu	Menu	User	All Users
Navigation	Menu > App Launcher		



1. Click [Menu] button in the bottom navigation bar to navigate to menu screen

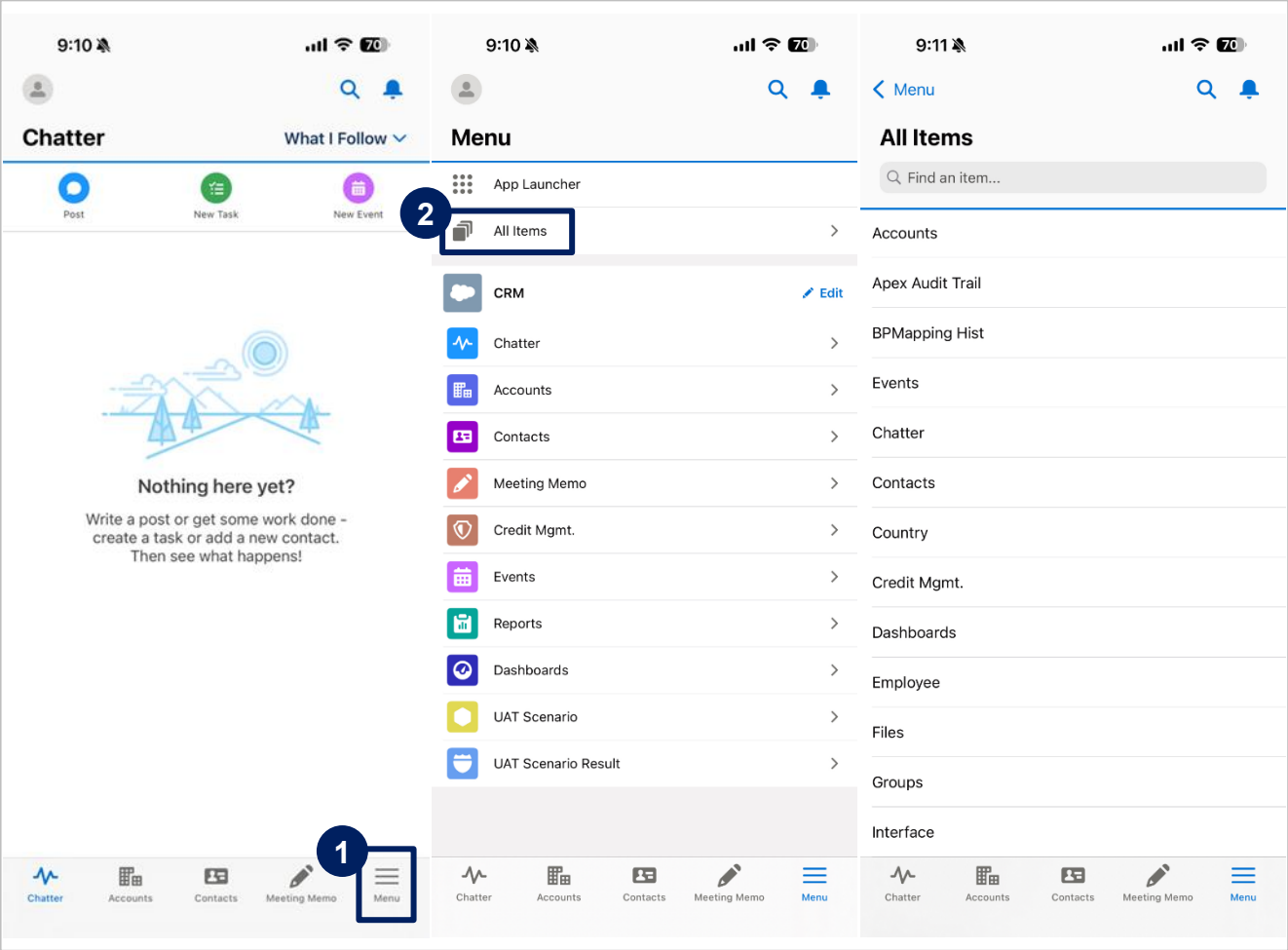
2. Select [App Launcher] to access App Launcher

3. Select required Apps from [App Launcher]

Steel division users are recommended to use Steel CRM, while other users are recommended to use CRM App.

Step 3. Notice

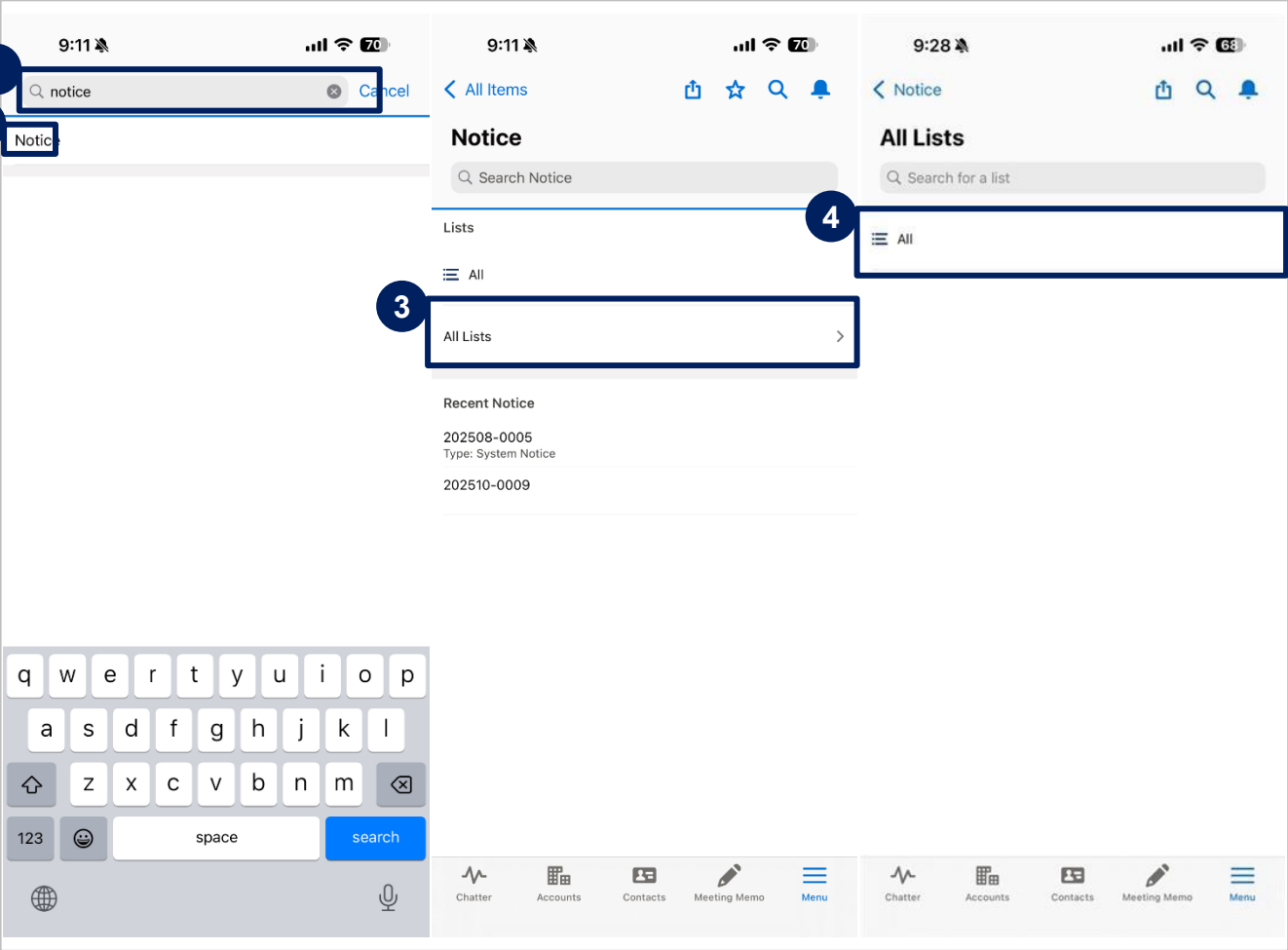
Step (Lv.2)	1. Notice Inquiry	Step (Lv.3)	1.1 List View(1/3)
Menu	Notice	User	All Users
Navigation	Notice		



1. Click [Menu] button in the bottom navigation bar to navigate to menu screen
2. Select [All Items] to access all menus

Step 3. Notice

Step (Lv.2)	1. Notice Inquiry	Step (Lv.3)	1.1 List View(2/3)
Menu	Notice	User	All Users
Navigation	Notice		



1. Search 'Announcement' in the search bar
2. Select [Announcement] to navigate to announcement menu
3. Click [All Lists]
4. Click [All]

Step 3. Notice

Step (Lv.2)	1. Notice Inquiry	Step (Lv.3)	1.1 List View(3/3)
Menu	Notice	User	All Users
Navigation	Notice		

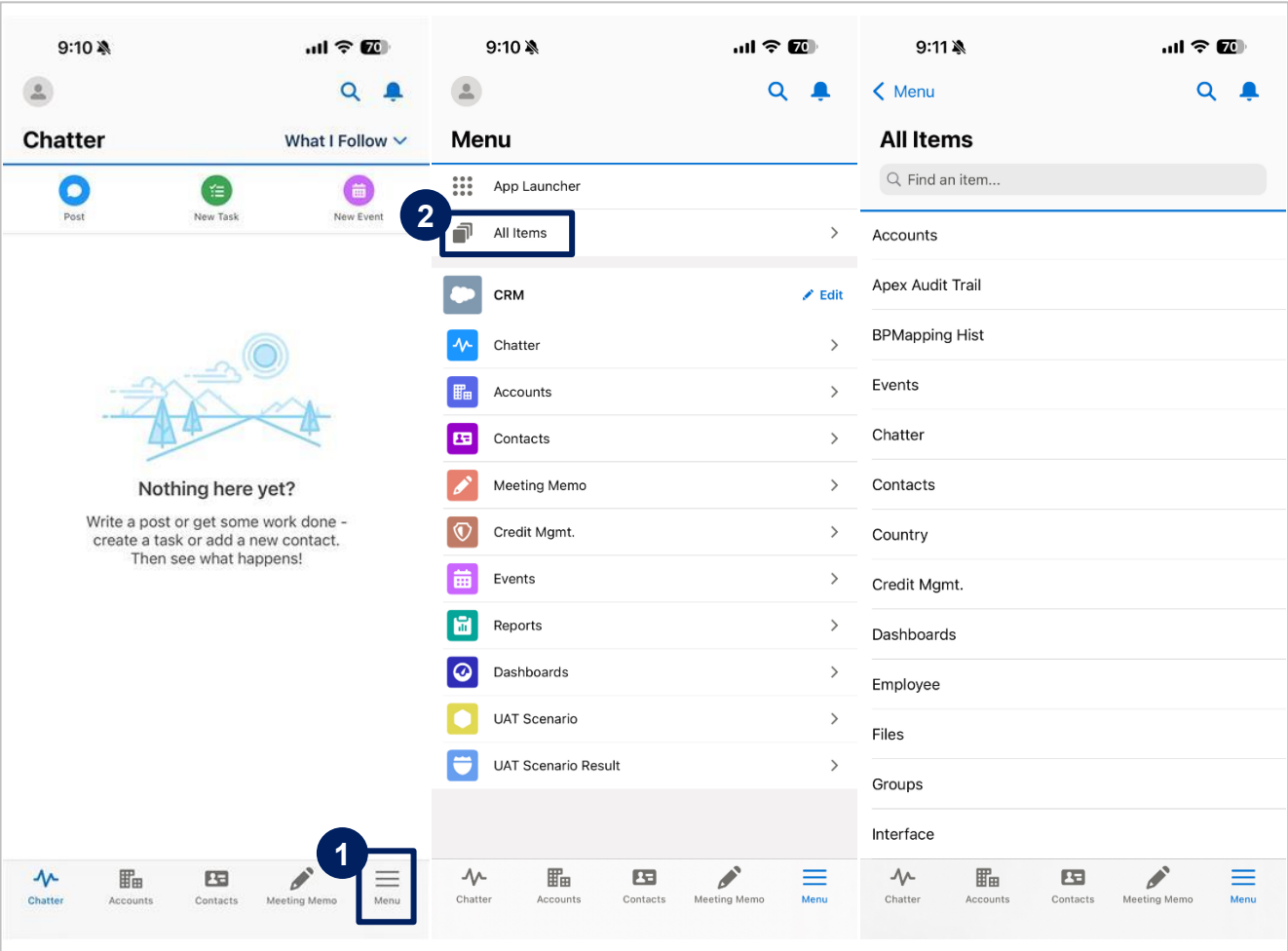
The screenshots illustrate the following steps:

- Select item from announcement list:** The first screenshot shows a list of notices. The item with ID 202508-0005 is selected.
- Click [Details] button:** The second screenshot shows the details page for the selected item, including a PDF file titled 'P_INTL_매뉴얼_미팅메모_250828'.
- View announcement details:** The third screenshot shows the system information for the item, including the owner (Migration), creation date (2025. 8. 28. PM 6:33), and last modified date (2025. 8. 28. PM 6:35).

1. Select item from announcement list
2. Click [Details] button
3. View announcement details

Step 4. News

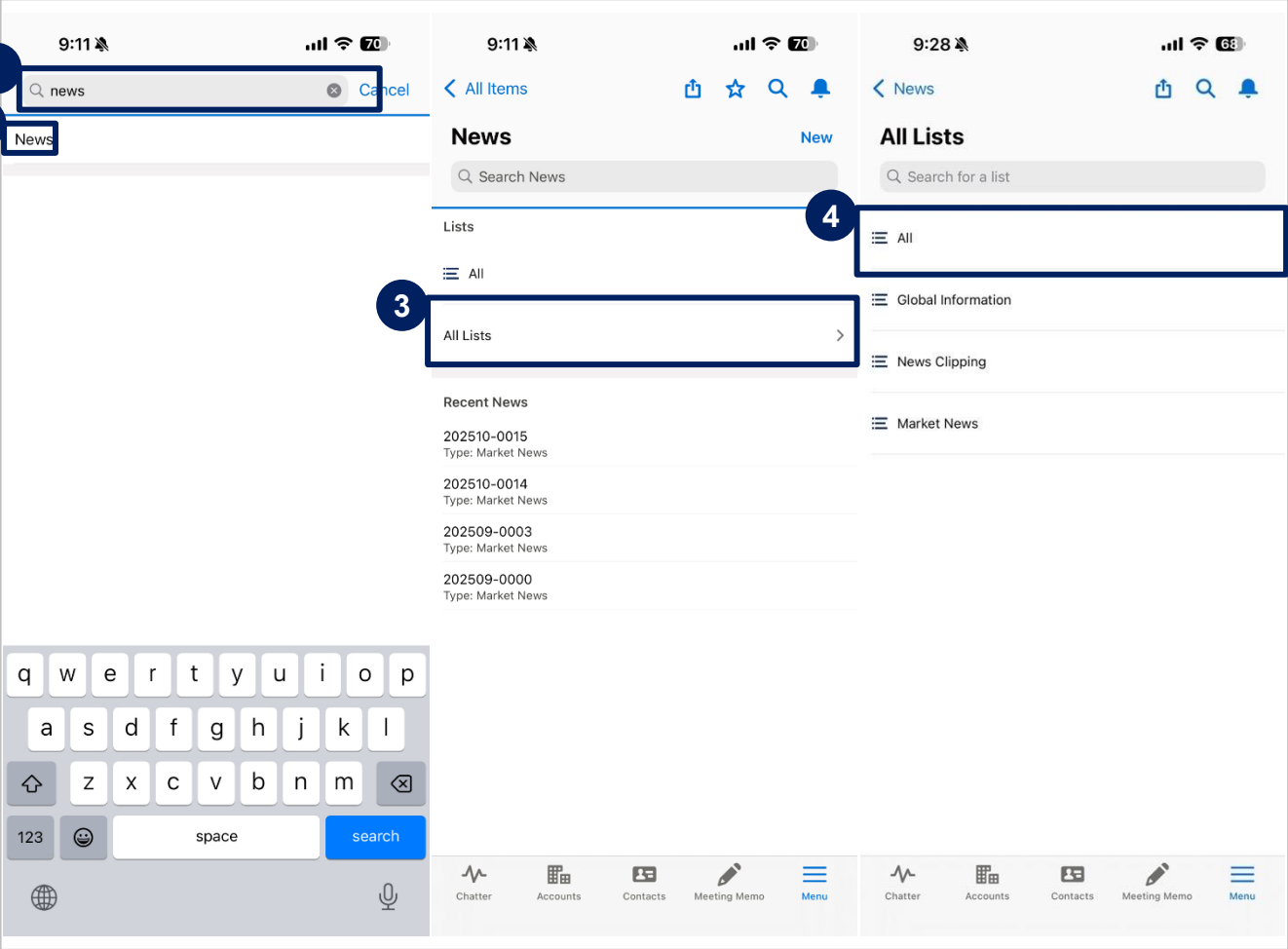
Step (Lv.2)	1. News Inquiry	Step (Lv.3)	1.1 List View(1/3)
Menu	News	User	All Users
Navigation	News		



1. Click [Menu] button in the bottom navigation bar to navigate to menu screen
2. Select [All Items] to access all menus

Step 4. News

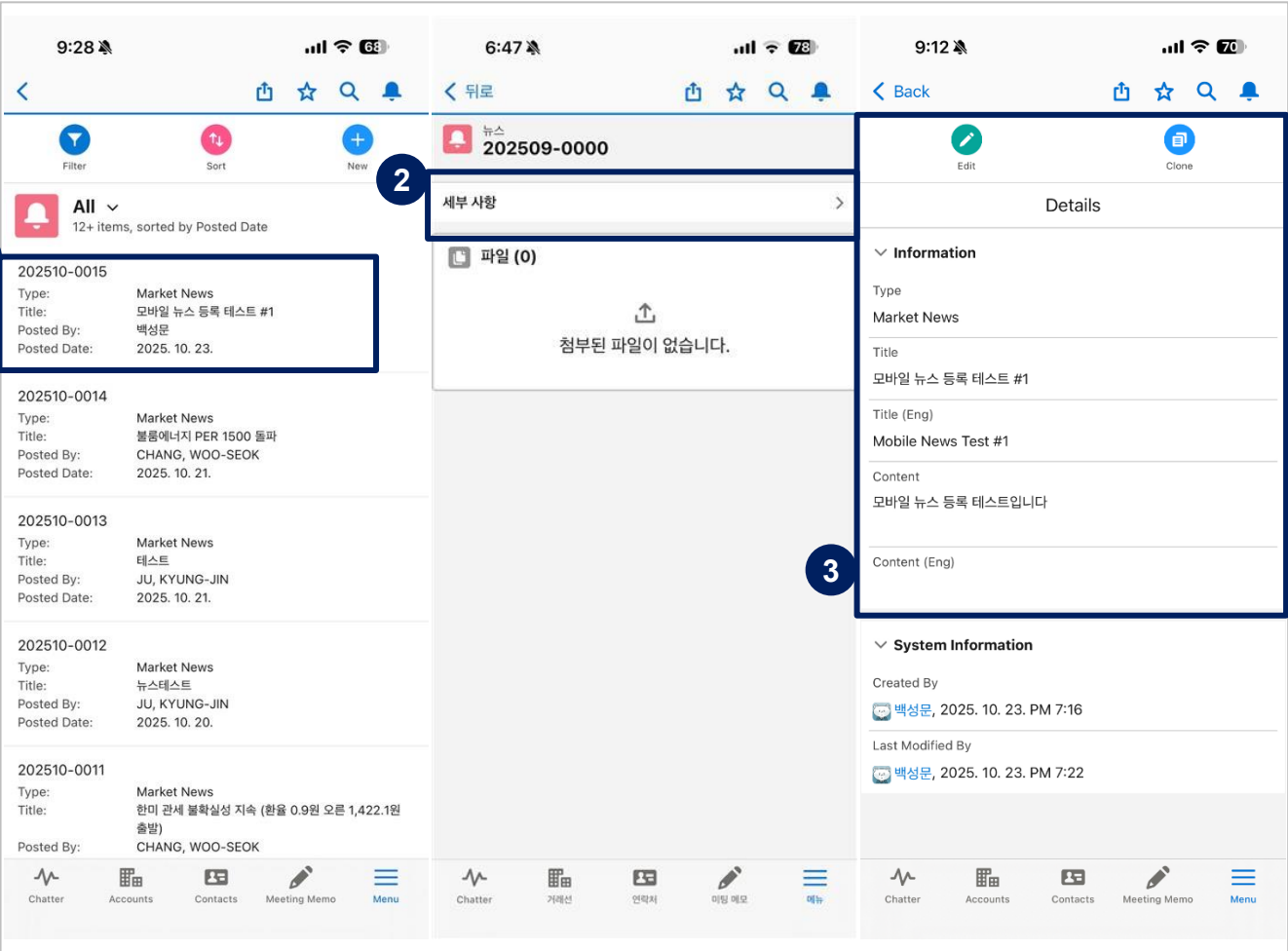
Step (Lv.2)	1. News Inquiry	Step (Lv.3)	1.1 List View(2/3)
Menu	News	User	All Users
Navigation	News		



1. Search 'News' in the search bar
2. Select [News] to navigate to news menu
3. Click [All Lists]
4. Click [All]

Step 4. News

Step (Lv.2)	1. News Inquiry	Step (Lv.3)	1.1 List View(3/3)
Menu	News	User	All Users
Navigation	News		



1. Select item from news list
2. Click [Details] button
3. View news details

Step 4. News

Step (Lv.2)	2. News Management	Step (Lv.3)	2.1 News Registration
Menu	News	User	All Users
Navigation	News		

The screenshots illustrate the news registration workflow in the mobile application. The first screen shows a list of news items with a 'New' button at the top right. The second screen shows the 'New News' form with fields for Type, Title, and Content. The third screen shows the confirmation message 'News "202510-0016" was created.' after saving the new news item.

1. Click [New] button from news list
2. Enter Category, Title, Content
Category: Market News, News Clipping, Global Information
3. Click [Save] button
4. News registration completed

The image displays three sequential screenshots of the Salesforce mobile application interface, specifically the 'Edit' screen for a News record (ID: 202510-0016).

Screenshot 1 (Left): Shows the top navigation bar with a red box highlighting the 'Edit' button (pencil icon) and a red circle '2' next to the 'Files (0)' section. The 'Details' section is visible below the 'Files' section.

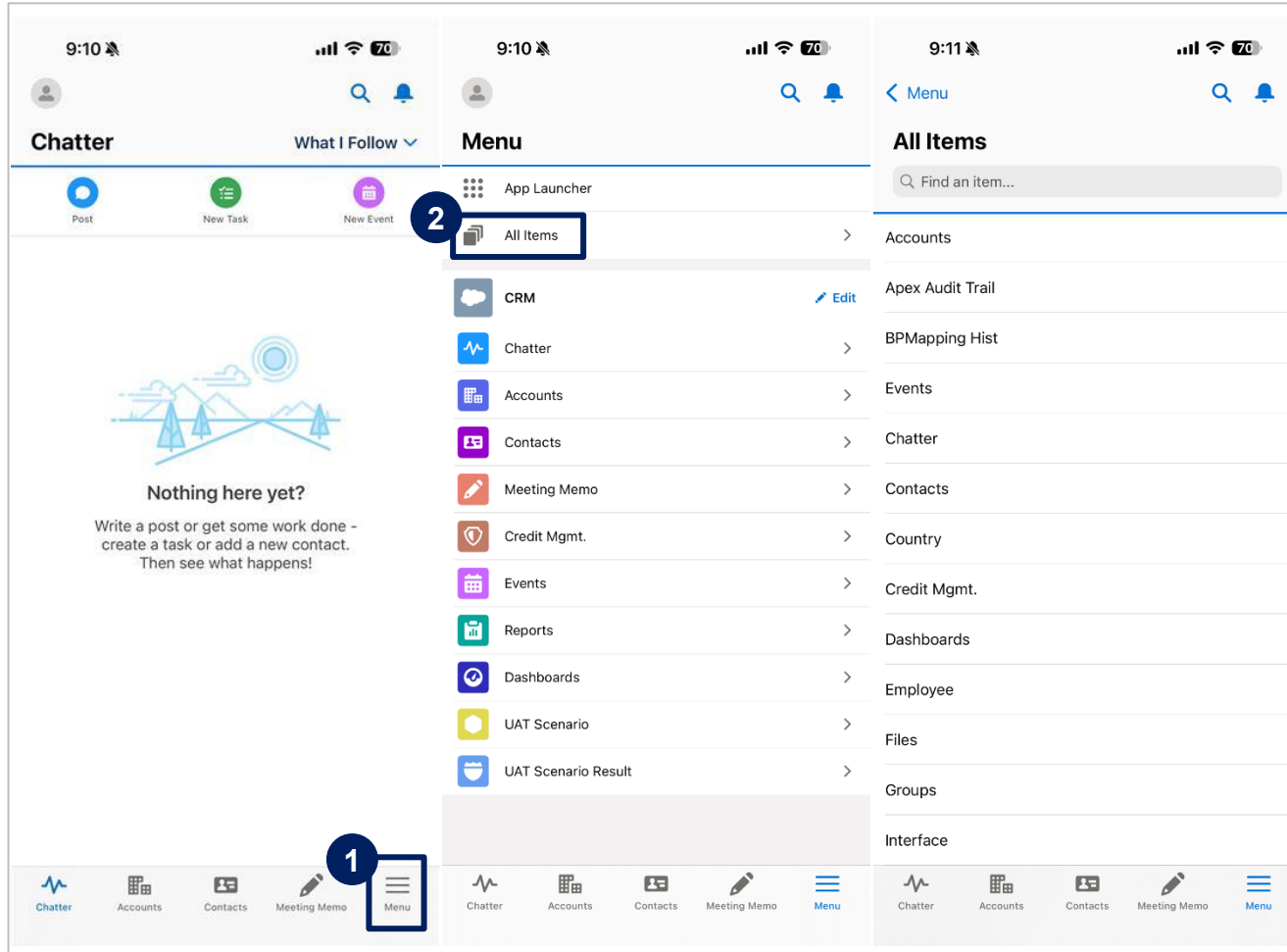
Screenshot 2 (Middle): Shows the 'Information' section with a red box highlighting the 'Type' and 'Title' fields. The 'Type' field is set to 'Market News' and the 'Title' field is set to 'mobile news test #2'. The 'Content' section is visible below the 'Title' field.

Screenshot 3 (Right): Shows the 'Details' section with a red box highlighting the 'Files (0)' section. A green toast message at the top indicates 'News "202510-0016" was saved.'

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Step 5. Change Owner

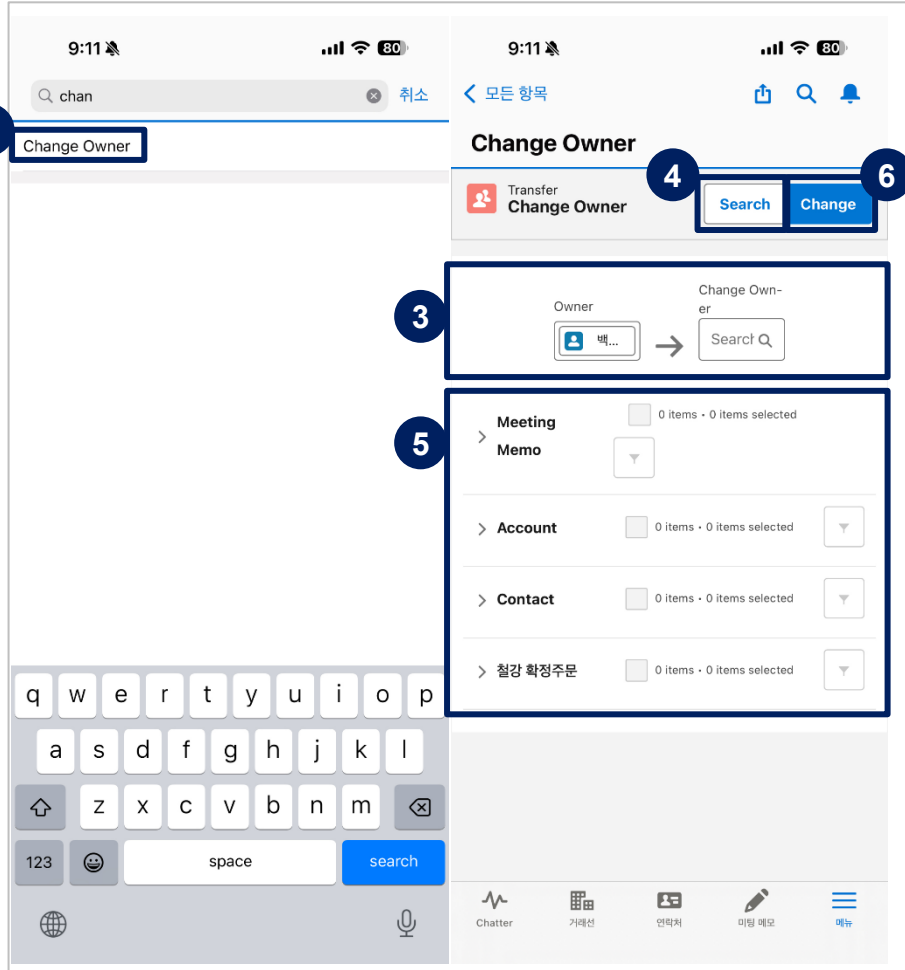
Step (Lv.2)	1. Record Transfer	Step (Lv.3)	1.1 Record Transfer(1/2)
Menu	Change Owner	User	All Users
Navigation	Change Owner		



1. Click [Menu] button in the bottom navigation bar to navigate to menu screen
2. Select [All Items] to access all menus

Step 5. Change Owner

Step (Lv.2)	1. Record Transfer	Step (Lv.3)	1.1 Record Transfer(2/2)
Menu	Change Owner	User	All Users
Navigation	Change Owner		



1. Search 'Change Owner' in the search bar
2. Select [Change Owner] to navigate to Change Owner menu
3. Set Owner / Change Owner
Owner: User who will transfer records (Default: Currently logged-in user)
Change Owner: User who will receive records (Search users after clicking text box)
4. Click [Search] button after setting Change Owner to retrieve transferable records
5. Select records to transfer in each category
6. Click [Change] button to transfer selected records