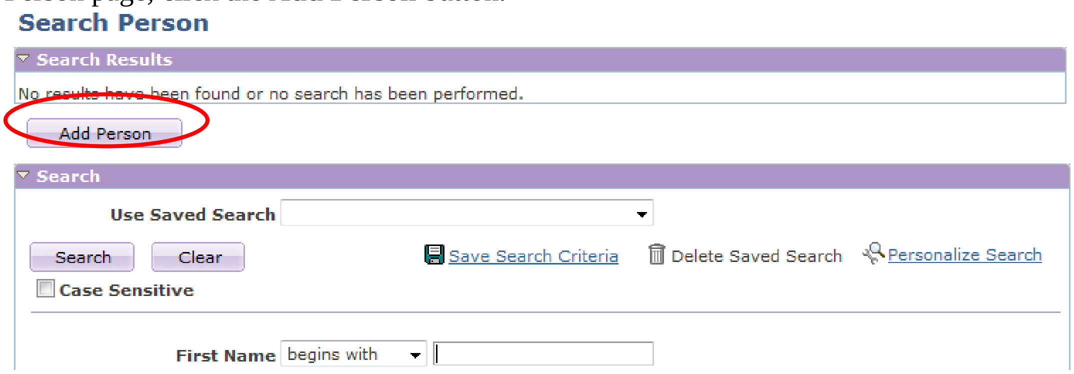
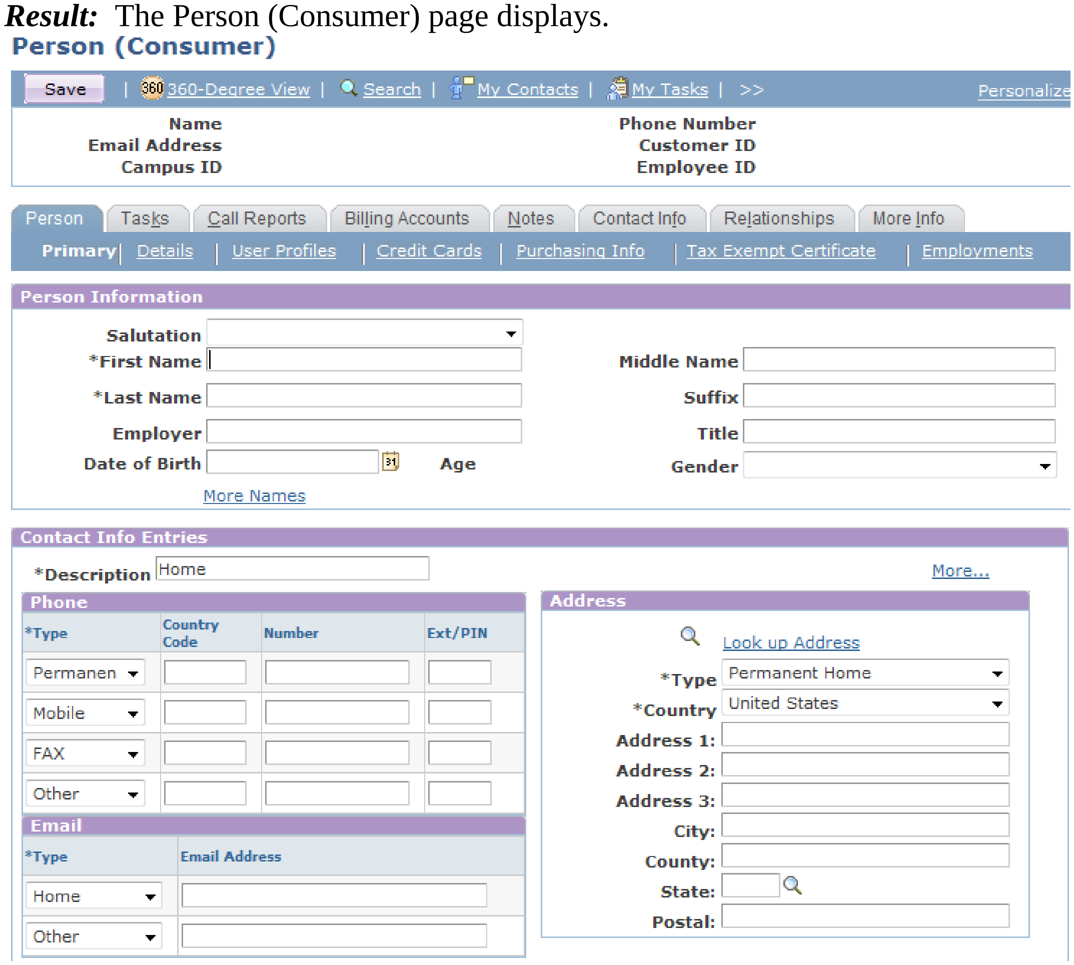
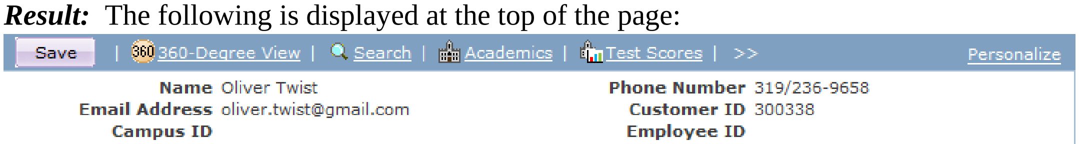
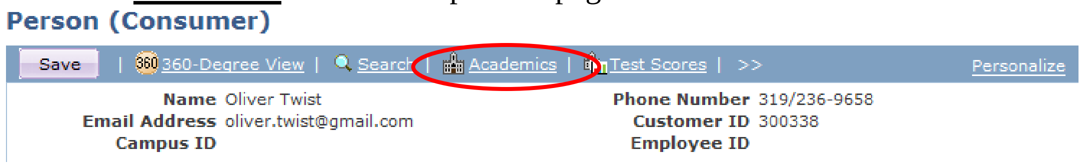
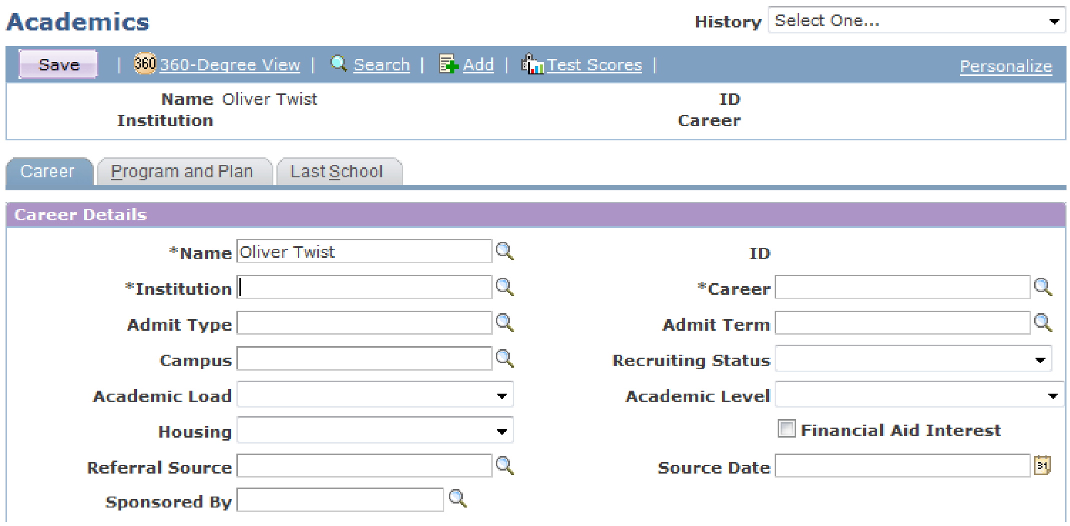
CRM – Entering a Contact Card

Purpose: Contact Card information must be entered into CRM to create a record for each prospect. Before entering a new contact card, complete a person search to ensure the person is not already in the system.

Step	Action
1.	Perform a person search to ensure the person is not already in the system. From the Search Person page, click the **Add Person** button.  OR Select **Main Menu › Customers CRM › Add Person** ***Result:*** The Person (Consumer) page displays. 

Step	Action
2.	Complete the following fields (at a minimum) in the **Person Information** and **Contact Info Entries** sections: **Person Information** • ***First Name** • ***Last Name** • **Date of Birth** – Use the **Choose a Date** button to populate this field • **Gender** **Contact Info Entries** **Phone** • **Type** – Select appropriate phone type from the drop-down list • **Country Code** – USE ONLY IF INTERNATIONAL STUDENT • **Number** – Enter phone number • **Ext/PIN** – If appropriate **Email** • **Type** – Select appropriate email type from the drop-down list • **Email Address** – Enter email address **Address** • **Type** – Select *Permanent Home* from the drop-down list • **Country –** Select appropriate country (default is United States) • **Address 1 –** Enter street address • **City –** Enter city • **State –** Enter state abbreviation code • **Postal –** Enter zip code ***Note:*** All fields with an asterisk (*) are required.
3.	Click the **Save** button at the top or bottom of the page. ***Result:*** The following is displayed at the top of the page:  ***Note:*** The record has been saved in the system and is assigned a **Customer ID**. This is NOT the EMPLID/Student's 6 digit University ID. A prospective student will only be assigned an EMPLID/Student 6 digit University ID when they apply for admission. The EMPLID will be their Student 6 digit University ID.

Step	Action
4.	Select the **<u>Academics</u>** link at the top of the page.  ***Result:*** The **Academics** page displays. The Academics page has three tabs: *Career*, *Program and Plan*, and *Last School*. 
5.	Complete the **Career Details** on the *Career* tab. Enter information from left to right for each row (See order below): ***Hint:*** Use the **Look Up** button to populate the fields • ***Institution** – Select **UNICS (University of Northern Iowa** populates**)** • ***Career** – Select **Graduate** or **Undergrad** (When working with incoming high school or transfer students from contact cards this is most likely Undergrad) • **Admit Type** – Select as appropriate (The most frequently used are **New Degree Seeking, Transfer, Freshman w/Coll Credit**) • **Admit Term** – Select as appropriate. Use the second column (Description) to choose the *Anticipated Term of Enrollment* from the contact card. • **Campus** – Select **Main Campus** • **Recruiting Status –** Select **Prospect** • **Academic Load** – Select **Full-Time**, unless otherwise noted • **Academic Level** – Select as appropriate • **Housing and Financial Aid interest** – NOT USED AT THIS TIME • **Referral Source** – Select as appropriate (The most frequently used from contact cards are College Fair or High School Visit) • **Source Date** – Automatically populates with today's date, update the source date to reflect the actual date of the event from the contact card. • **Sponsored By** – NOT USED AT THIS TIME

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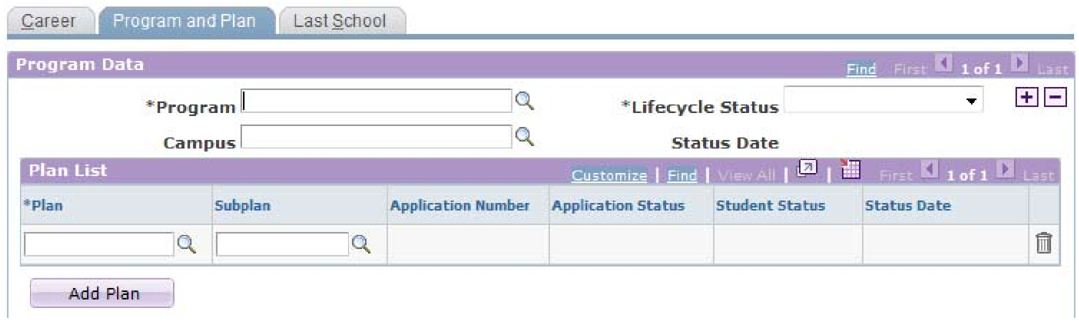
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6.</td><td>

Select the *Program and Plan* tab. The Program and Plan tab displays information related to Programs (Colleges) and Plans (Majors) the prospect may be interested in.



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<tr><td>7.</td><td>

Complete the **Program Data and Plan List** on the *Program and Plan* tab. Enter information from left to right for each row (See order below):

- ***Program** – Select as appropriate (Program = College)
- ***Lifecycle Status** – Select **Prospect** (This field changes as the student applies for admission, etc.)
- ***Plan** – Select as appropriate (Plan = Major). This field is dynamic; it varies according to which Program was selected.

Note: To add multiple interests at the Prospect level:

- For interest in another Plan/Major within the same Program, use the **Add Plan** button Add Plan
- For interest in a Plan/Major outside of the selected Program, use the **Add New Row** button to add additional Programs/Plans.

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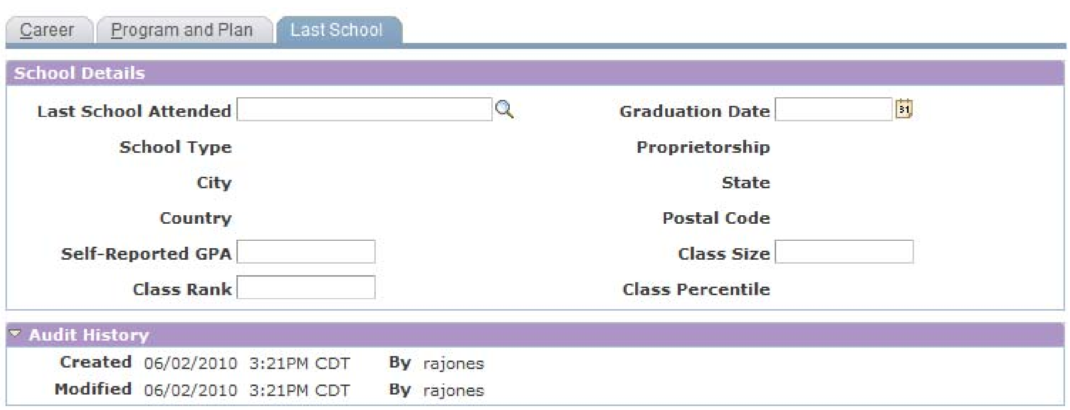
<tr><td>8.</td><td>

Select the *Last School* tab. The *Last School* tab displays the last high school or college/community college (if they graduated high school more than a year ago and have a transfer college listed we will store the primary transfer college here).



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<tr><th>Step</th><th>Action</th></tr>
<tr><td>9.</td><td>Complete the School Details information on the Last School tab.

Last School Attended – Use the Look Up button to search for and select the appropriate school.
Graduation Date – Use the Choose a Date button to select the most appropriate date. This is a full date field; however we may only have the year or month/year.
<table>
<tr><th>If the student is a …</th><th>Then…</th></tr>
<tr><td>High school student or transfer student with May graduation</td><td>Select the last business day in May.</td></tr>
<tr><td>Transfer student with December graduation</td><td>Select December 15th of that year.</td></tr>
<tr><td>Transfer student with summer graduation</td><td>Select July 30th of that year.</td></tr>
</table>

Self-Reported GPA, Class Rank, Class Size – Enter if provided

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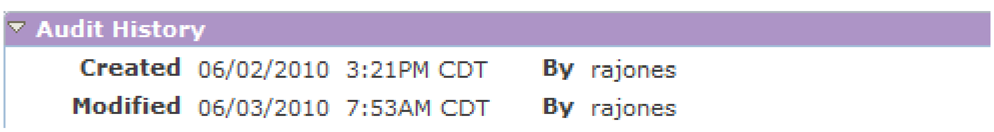
<tr><td>10.</td><td>Click the Save button.

Result: The record is saved. The Audit History at the bottom of each page is updated each time modifications are made.


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