[](http://www.ljmu.ac.uk/)

**CRM – Faculty Admissions**

Liverpool John Moores University

**Faculty Admissions**

**Contacts, Emails & Enquiries**

Version 0.4. February 2019

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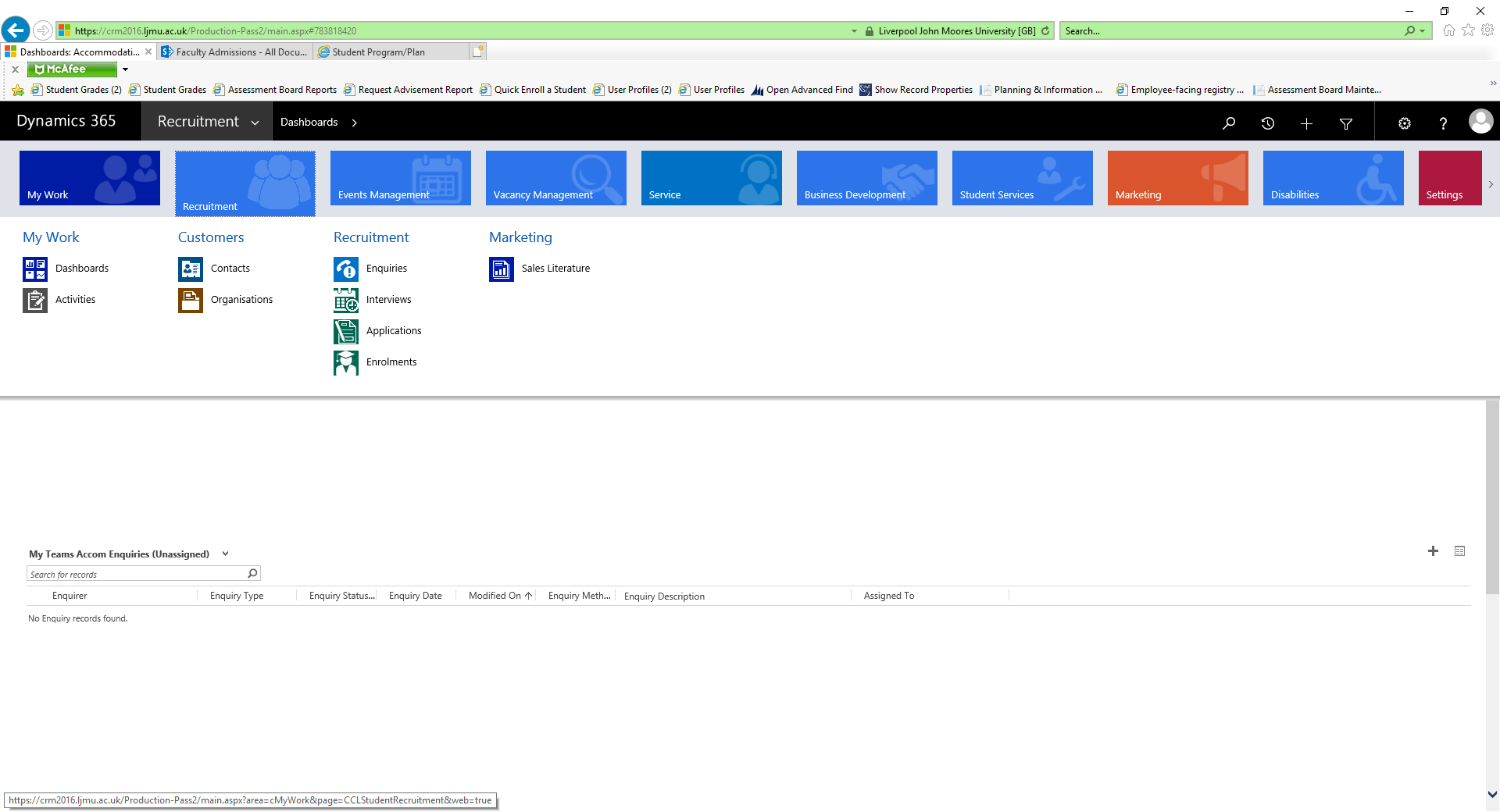
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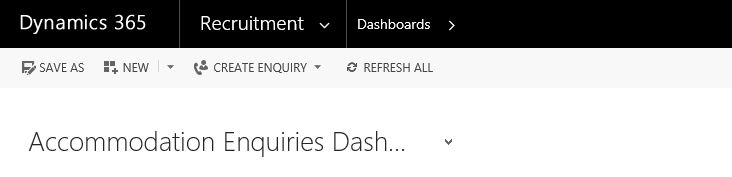
# **1. Dashboards**

## 1.1 Locating your Dashboard

* Each team within Faculty Admissions will have their own dashboard, which acts as a sort of ‘home’ page.
* Each Dashboard is built up of different ‘views’ to show different information.
* Dashboards for Faculty Admissions are split as follows:
* APS Admissions
* APS Admissions V2
* BUS Admissions
* FET Admissions
* Health Admissions
* Marsh Admissions
* Science Admissions (Version 2)
  + 1. Ensure you are in **Recruitment** area.
    2. You can select **Recruitment** by clicking in the box to the right of **‘Dynamics 365’**.
    3. Select **Dashboards**



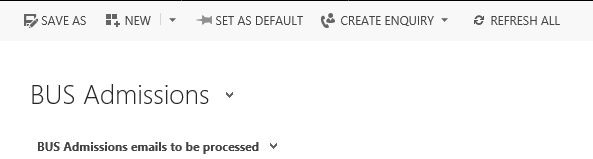
* + 1. The top dashboard in the list will display, but this is not likely to be your dashboard.
    2. Click on the arrow to the right to bring up a list to select your dashboard.



* 1. **Pinning your Dashboard**

You can then ‘pin’ your dashboard so that the correct dashboard displays each time you log in to CRM.

* + 1. Click on **‘Set as Default’**



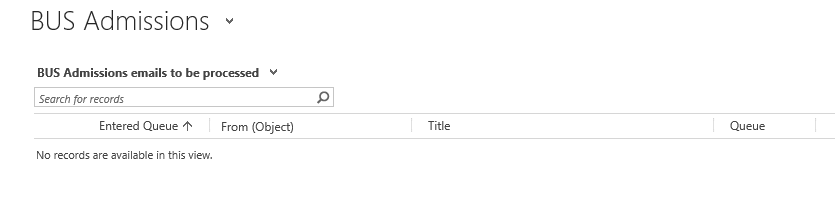
* 1. **Understanding Emails and Enquiries**
* You will already know about Emails but Enquiries are a CRM Dynamics Concept.
* Before replying to an email, you must first convert the email to an Enquiry and then respond as normal to the email and close off the Enquiry.
* Enquiries are used in CRM as they allow a picture to form of types of queries LJMU receive and with whom. This information can easily be reported on if in an Enquiry format and allows the University to better understand their enquirers.

## 1.4. What’s on the Dashboard

The dashboard displays all your team’s incoming emails and open enquiries:

**1.4.1. Emails to be Processed**

Incoming emails to your team mailbox are displayed here.

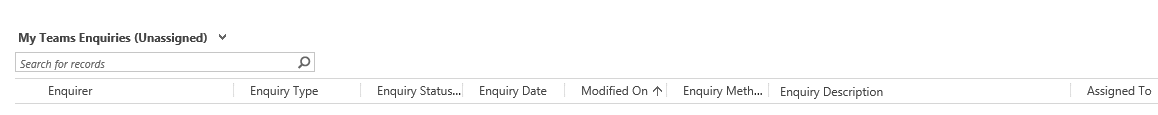


**1.4.2. My Teams Enquiries (Unassigned)**

Any email you convert into an enquiry will be removed from the ‘Emails to be processed’ queue, but will be added to the ‘My Team’s Enquiries (Unassigned)’ list with the status ‘New Enquiry’.

Any emails which come in relating to an open enquiry will bypass the top grid and go directly to ‘My Team’s Enquiries (Unassigned)’ with a status of ‘Contacted’ (3).

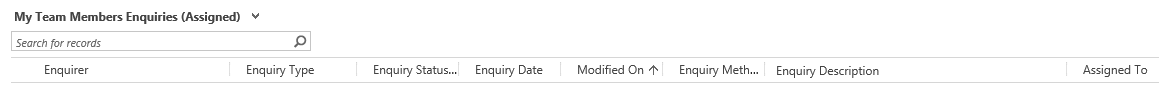
**This view also now contains a ‘Priority’ column if you wish to triage Enquiries. Priority can be set within the Enquiry view and can be set at Low, Standard or High Priority.**



**1.4.3. My Teams Enquiries (Assigned)**

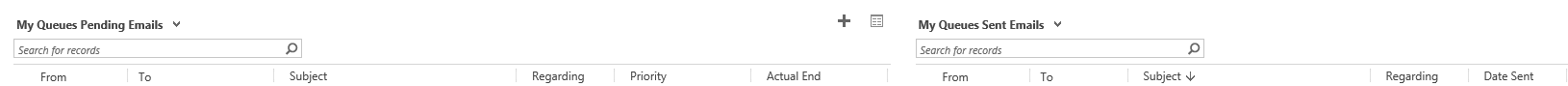
If you assign the email to yourself or someone else specifically in your team then they will be added to My Team Members Enquiries (Assigned) view

**This view also now contains a ‘Priority’ column if you wish to triage Enquiries. Priority can be set within the Enquiry view and can be set at Low, Standard or High Priority.**



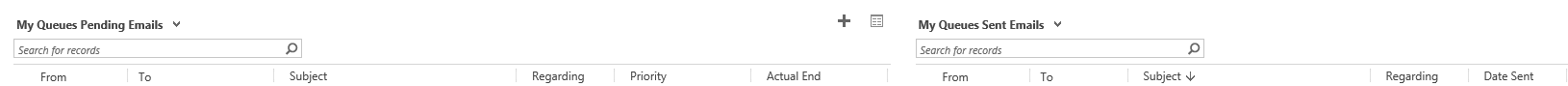
**1.4.4. My Queues Pending Emails**

These are emails which have been sent from someone in your team, which for whatever reason have become stuck and will not be sent by the system. Please keep an eye on this view and contact Helpdesk /BST if you need help fixing this.



**1.4.5. My Queues Sent Emails**

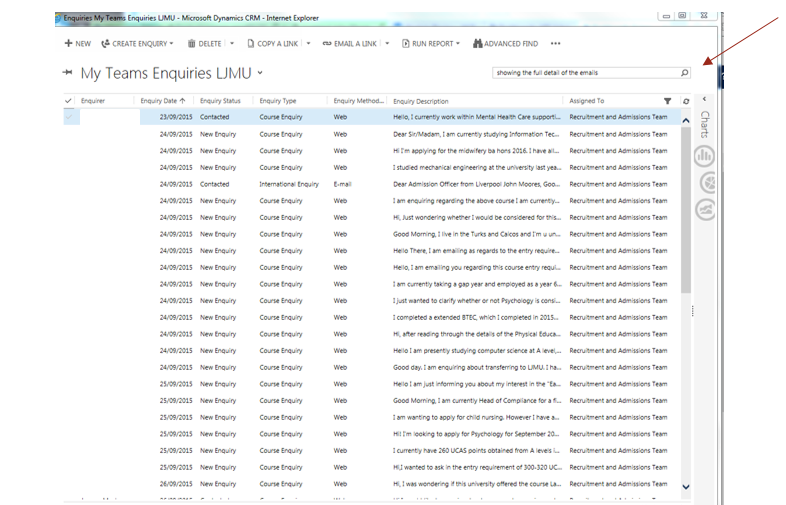
All Emails sent by your team.



You can expand either of these entities by clicking on the grid to the right of the dropdown:



This will create a pop out box showing all the emails or enquiries in much greater detail, making it much easier to search:



You can sort any of the columns by clicking at the top of the column (ascending or descending, numerical or alphabetical dependant on contents), or you can use the search function at top right to search for a student by name for example.

**1.5. Searching with the Wildcard ‘\*’**

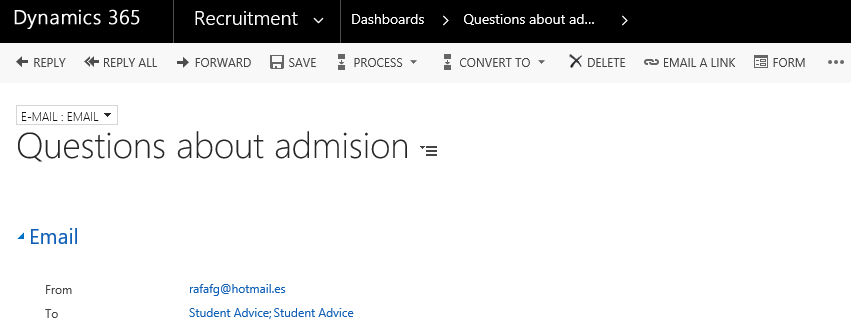
* An important tip to remember when searching is to use the wildcard function ‘\*’.
* It is important that you use the wildcard in place of a Middle Name (as CRM will search for full names including Middle Name) or if you are unsure of the contacts full name.

# **Processing Emails**

* Click on the Email title to open it and read the contents.
* If you click on the senders Email address (coloured BLUE) you will be taken to the senders contact record. You can amend contact information on this screen.
* Please include as much information as you can.
* Options available to you are:

Options available are:

* **Delete** – Only for Spam/Trash Emails.



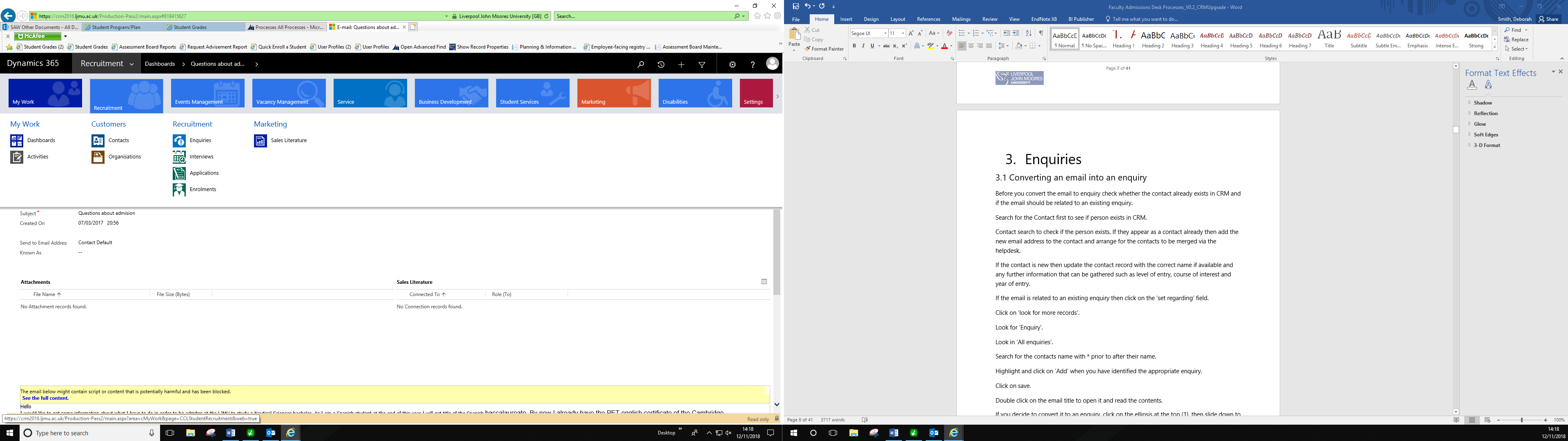
* Click **Delete** on the ‘Confirm Deletion’ box which appears, and the email deletes, and you are taken back to the dashboard.
* **Forward** – only forward an email where you need to pass it to someone else within LJMU, but they are not a CRM user:
* Examples of this are **Awards Queries or Registry Services Queries.**
* Please note that the best way to get the Email query to specific teams within CRM is to convert an email to a specific Enquiry Type. E.g. Accommodation Enquiry, Funding Enquiry (If SAW). It will automatically route to their queue.
* If you do need to Forward: Click ‘Forward’, type the full email address into the ‘To’ field, then click ‘Send’. You can then delete the original email, or (to keep it on the contact’s activities), remove it from the queue.

# **Email & Enquiries**

## 3.1 Search for the Contact in the Search bar.

Before you convert the email to an enquiry you should search CRM to check whether the contact **already exists** and if the email should be related to an **existing** enquiry.

* + 1. Click on **‘Recruitment’**
    2. Click on **‘Contacts’**



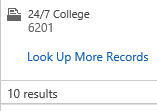
* If you find Duplicate Contacts then add the new email address to the Contact and **arrange for the contacts to be merged by raising a Helpdesk Job. BST will pick this up and carry out the merge.**
* If not a duplicate, then update the existing contact record with the correct name if available and any further information that you may have gathered such as level of entry, course of interest and year of entry.
  1. **Set Regarding**

Whilst reviewing the Contacts record, you may find an existing Enquiry which the new Email received should be attached to, instead of a new Enquiry being created. In this case, you will need to set the email **‘Regarding’** the existing enquiry.

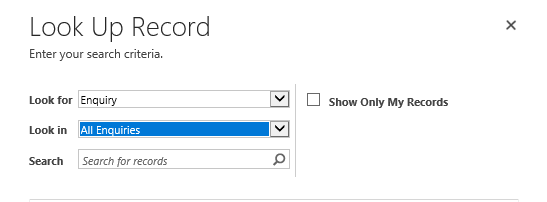
* + 1. Open up the Email and scroll down to the bottom of the window.
    2. Click into the **Regarding** field.



* + 1. Click on the **look up**
    2. Scroll down to **‘look for more records’.**



* + 1. Change the **Look for** and **Look In** as below:



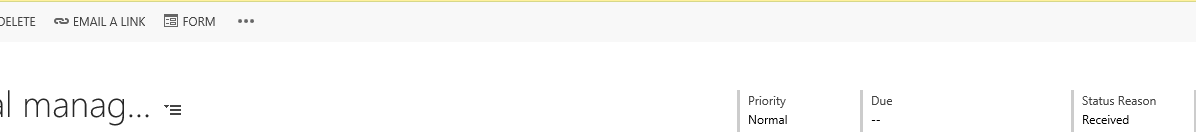
* + 1. Search for the contacts name with ‘\* ‘prior to and after their name.
    2. Highlight and click on ‘**Add’** when you have identified the appropriate enquiry.
    3. Click on **Save**.
    4. Double click on the email title to open it and read the contents.

**3.3. Converting an Email to an Enquiry**

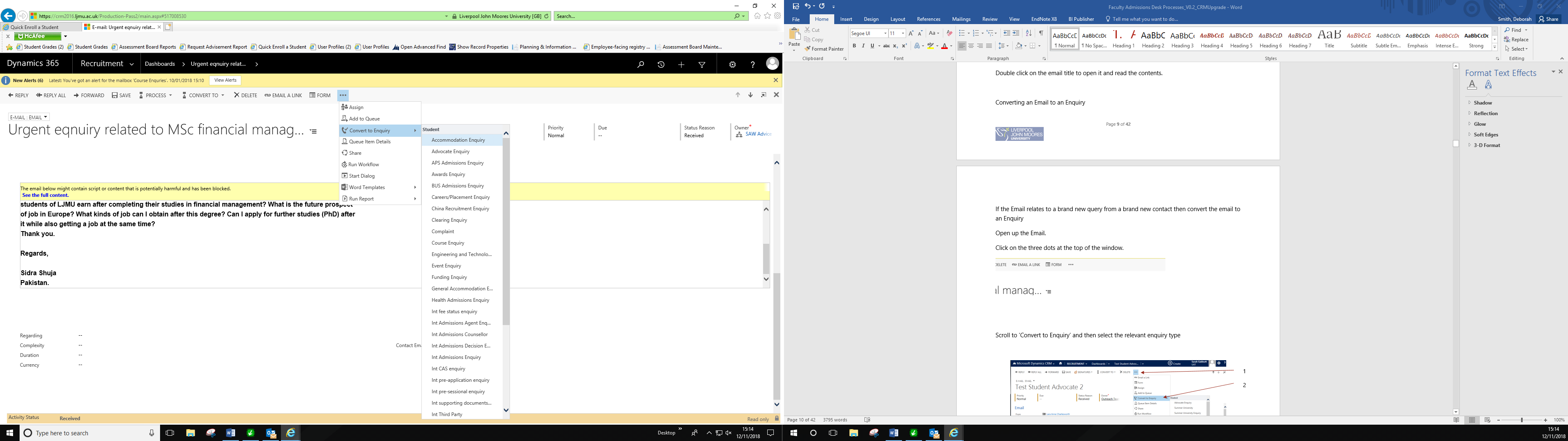
* If the Email relates to a brand new query from a brand new contact then convert the email to an Enquiry

3.3.1. Open up the Email.

3.3.2. Click on the **three dots** at the top of the window.



3.3.3. Scroll to ‘**Convert to Enquiry’** and then select the relevant enquiry type



* Within Admissions, each Faculty has their own enquiry type, which then feeds into their queue and dashboard.
* Once converted, the email will disappear from **‘<team> emails to be processed’** and appear below on your team’s **‘My Team’s Enquiries LJMU’.**

## 3.4. Converting an email into an enquiry for another team

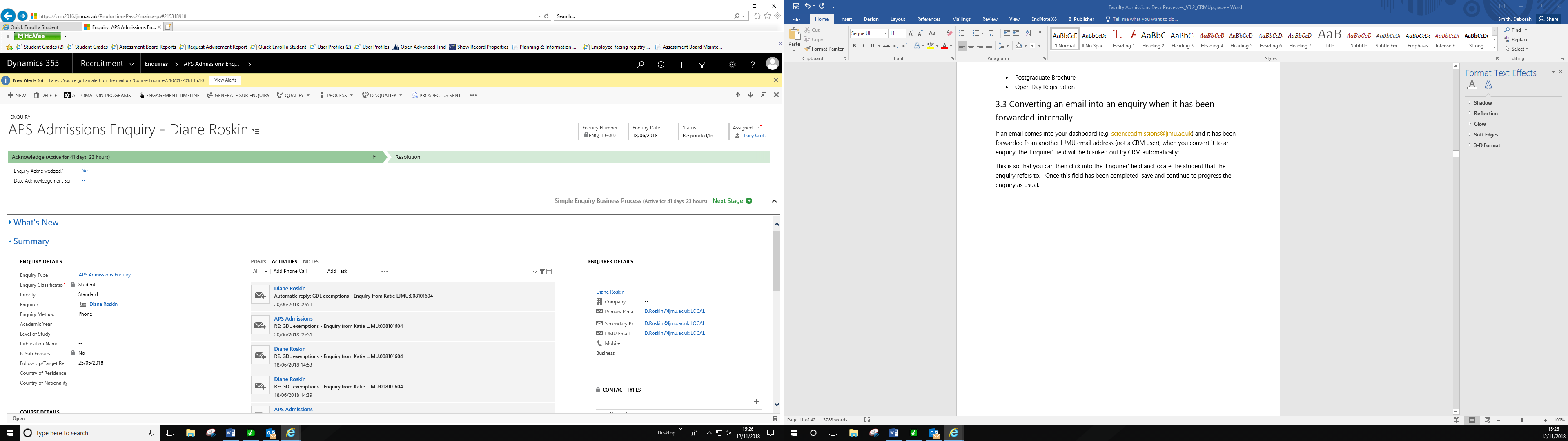
* If an email comes into your dashboard (e.g. scienceadmissions@ljmu.ac.uk), but it is apparent that the query needs to be answered by Engineering, then, select the Engineering and Technology Enquiry. This will then disappear from ‘Science Admission’s emails to be processed’ dashboard, and appears on Engineering & Technology’s ‘My Team’s Enquiries LJMU’ with a status of ‘New Enquiry’.

Enquiry Types:

|  |  |  |
| --- | --- | --- |
| **Enquiry** | **Team it goes to:** | **Additional Notes** |
| Accommodation Enquiry | Accommodation Team |  |
| Advocate Enquiry | Outreach Team |  |
| APS Admissions Enquiry | APS Admissions |  |
| Awards Enquiry | Your Dashboard | This is used, it is auto routed to remain on the user’s dashboard if they created this enquiry type.  And then the email should be forwarded on to awards@ljmu.ac.uk |
| BUS Admissions Enquiry | Bus Admissions Team |  |
| Careers/Placement Enquiry | Your Dashboard | This is used, it is auto routed to remain on the user’s dashboard if they created this enquiry type.  And then the email is forwarded on to employerengagement@ljmu.ac.uk or careers@ljmu.ac.uk |
| China Recruitment Enquiry | International Recruitment Team |  |
| Clearing Enquiry |  | This is not to be selected as it is only relevant to the enquiries that are brought over from the SIS integration |
| Complaint | Your Dashboard | This Enquiry type is also routed to remain on the user’s dashboard as they are not always associated with recruitment only. |
| Course Enquiry | Course Enquiries |  |
| Engineering & Technology Admissions Enquiry | Engineering & Technology Team |  |
| Event Enquiry | Your Dashboard | This auto routes to remain on the user’s dashboard if they created this enquiry type, as many other users are involved with events not just recruitment |
| Funding Enquiry | SAW Finance Team |  |
| General Accommodation Enquiry | Accommodation Team |  |
| Health Admissions Enquiry | Health Admissions Team |  |
| Int Fee Status Enquiry | International Admissions Team |  |
| Int Admissions Agent Enquiry | International Admissions Team |  |
| Int Admissions Counsellor | International Admissions Counsellor |  |
| Int Admissions Decision Enquiry | International Admissions Team |  |
| Int Admissions Enquiry | International Admissions Team |  |
| Int CAS Enquiry | International Admissions Team |  |
| Int pre-application Enquiry | International Admissions Team |  |
| Int pre-sessional Enquiry | International Admissions Team |  |
| Int supporting documents | International Admissions Team |  |
| Int Third Party | International Admissions Team |  |
| Marsh Admissions Enquiry | Marsh Admissions Team |  |
| Middle East & Africa Recruitment Enquiry | International Relations Team | Not used/monitored so please beware if wishing to use. |
| Postgraduate Brochure | Course Enquiries |  |
| Scholarship Enquiry | SAW Finance Team |  |
| School Enquiry | Outreach Team |  |
| Science Admissions Enquiry | Science Admissions Team |  |
| South Asia Recruitment Enquiry | International Relations Team | Not used/monitored so please beware if wishing to use. |
| South East Asia Recruitment Enquiry | International Relations Team | Not used/monitored so please beware if wishing to use. |
| Student Admin Enquiry | Your Dashboard | This is used, it is auto routed to remain on the user’s dashboard. Please email to [RegistryServices@ljmu.ac.uk](mailto:RegistryServices@ljmu.ac.uk) |
| Summer University Enquiry | Outreach Team |  |
| Undergraduate Prospectus | Course Enquiries |  |

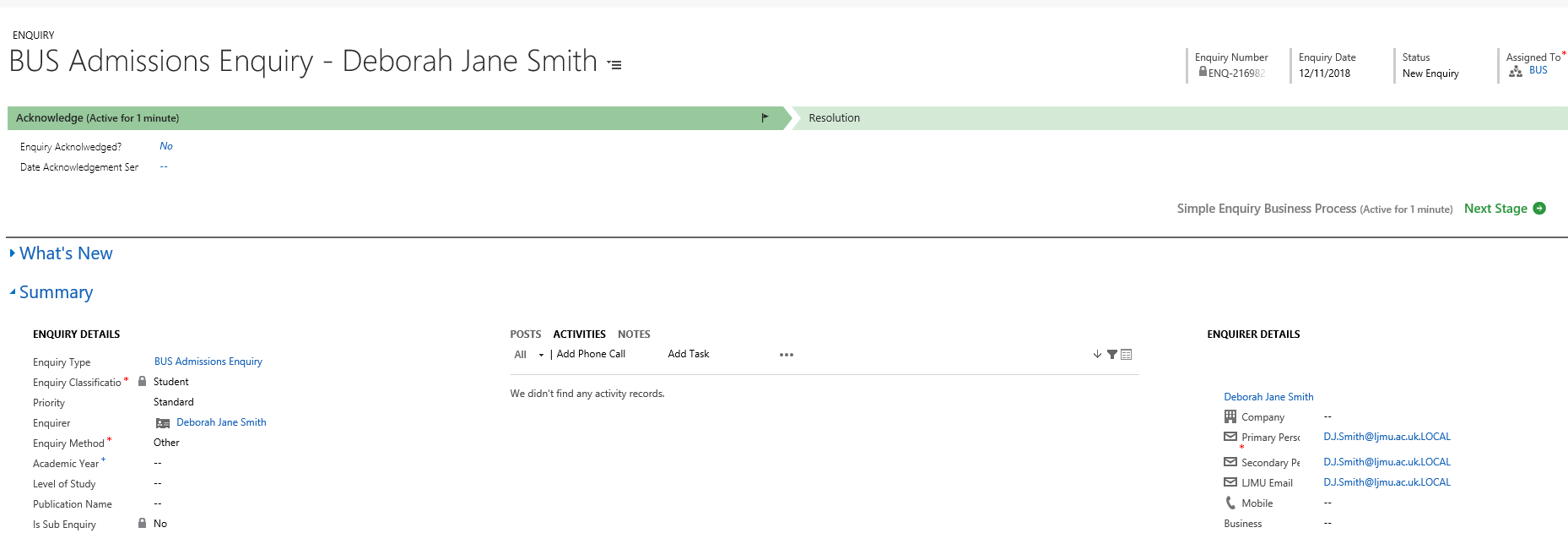
## 3.5. Converting an email into an enquiry when it has been forwarded internally

* If an email comes into your dashboard and it has been forwarded from another LJMU email address (not a CRM user), first of all, search for the Contact which the Email relates to.
* You need to firstly check the Contact exists, and if not, create a new contact record.
* Secondly, if the contact does exist, check that the Enquiry doesn’t already exist.
* If you are satisfied the Contact exists and the Enquiry doesn’t already exist, you can create an Enquiry from the Contact record.
* Once Saved, you can navigate back to the original Email & follow guidelines to **Set Regarding (Refer to Section 3)**
* Then continue to progress the enquiry as usual.

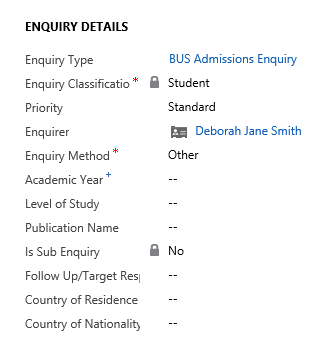


## 3.6. Progressing an enquiry

* All Faculty Admissions enquiries appear with the same process bar once converted:



* The **Enquiry Type, Enquiry Classification, Enquirer and Enquiry Method** will already be filled in for you, as you have already chosen the enquiry type and it was created through an email.
* CRM has recognised the email address and thus sets the enquirer to the correct student.



**3.7. Stages of an Enquiry**

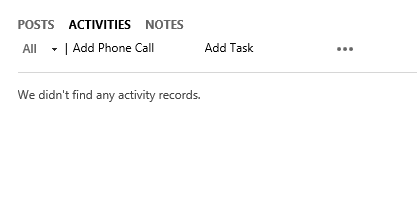
* There are two stages, **Acknowledge and Resolution.**
* The flag in the process bar shows where you are up to - it will not let you click **‘Next Stage’** and move on until all the mandatory fields are complete.

**3.7.1. Acknowledge Stage**

* Click **‘Yes’** in the **‘Enquiry Acknowledged’** field, and the date will auto-fill.
* Click **‘Next Stage’** on the process bar and you will move into the **‘Resolution’** stage, and the blue flag will move across.



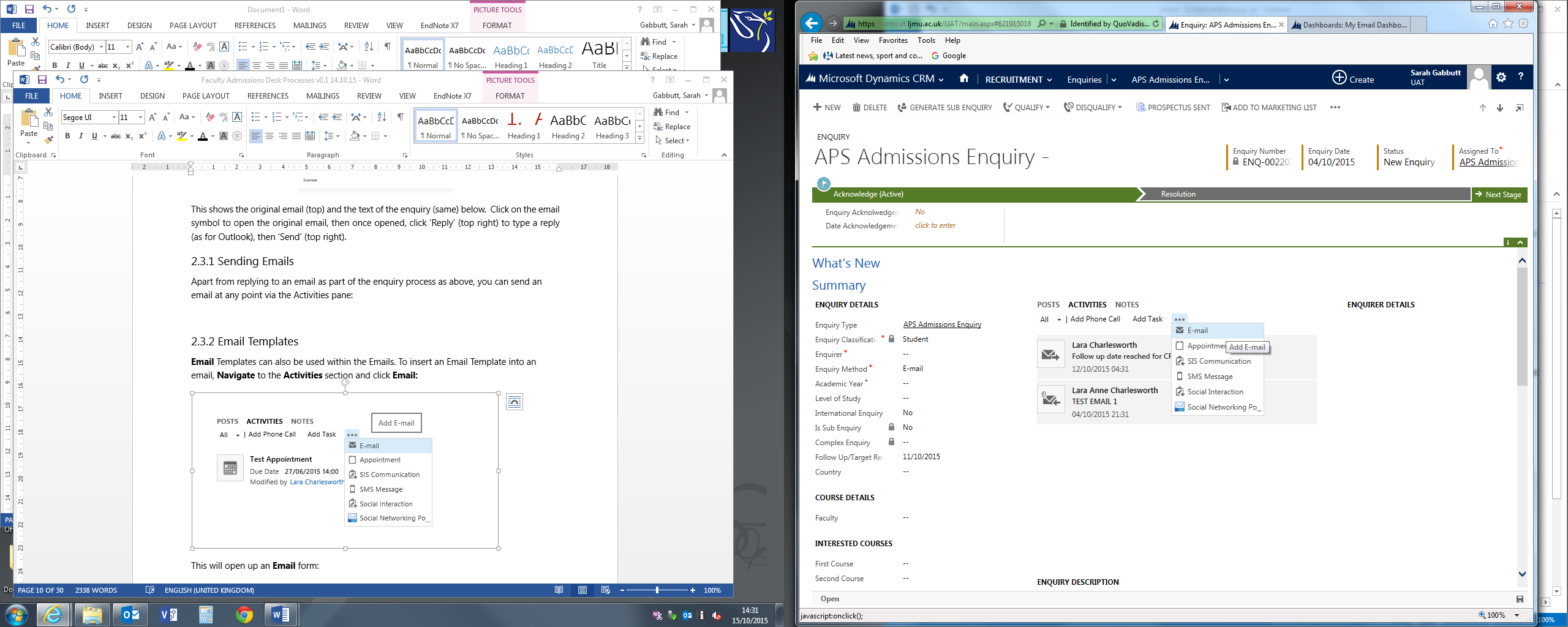
* At this point you may want to add an activity, such as an email or phone call.
* Click on **Activities** in the centre pane:



* If the Enquiry was the result of an Email received, you will see it here and the Email will also form the text of the enquiry below.
* Click on the email symbol to open the original email, then once opened, click **‘Reply’** (top right) to type a reply, then **‘Send’** (top right).

### 3.8. Sending emails

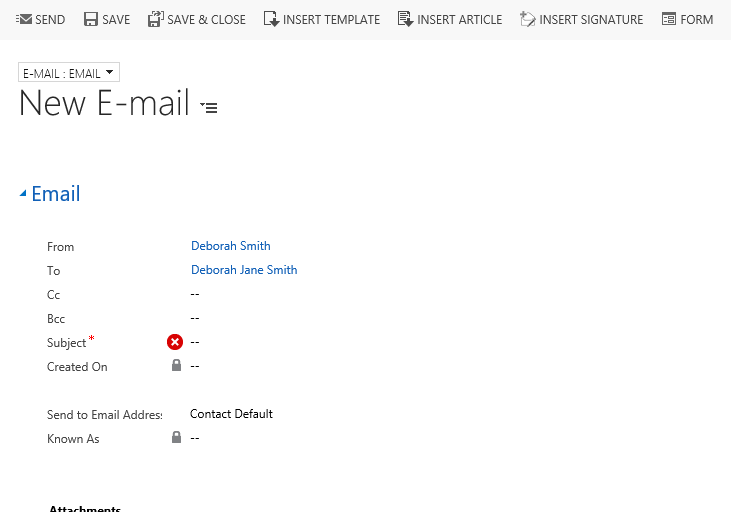
* Apart from replying to an email as part of the enquiry process as above, you can send an email at any point via the **‘Activities’** pane:



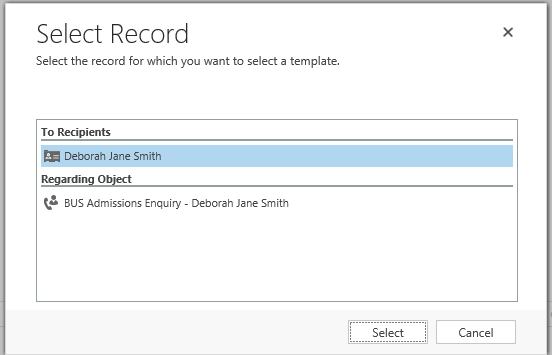
* A new email will open, complete as you normally would for Outlook. There is no need to make a note of emails, as they are all saved to activities in date order (newest first).

### 3.9. Inserting email templates

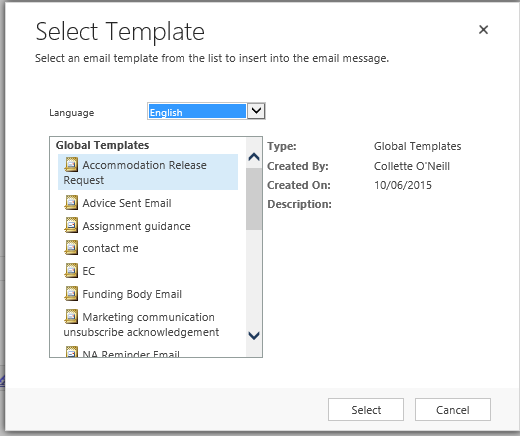
* Dynamics does not replicate the full functionality of Outlook, for example, there is no equivalent of an out of office or Auto Signature.
* To use a signature, you must use a template and insert it into the email each time used.



* Click onto ‘**Insert Template’**
* Click on ‘**To Recipients’**



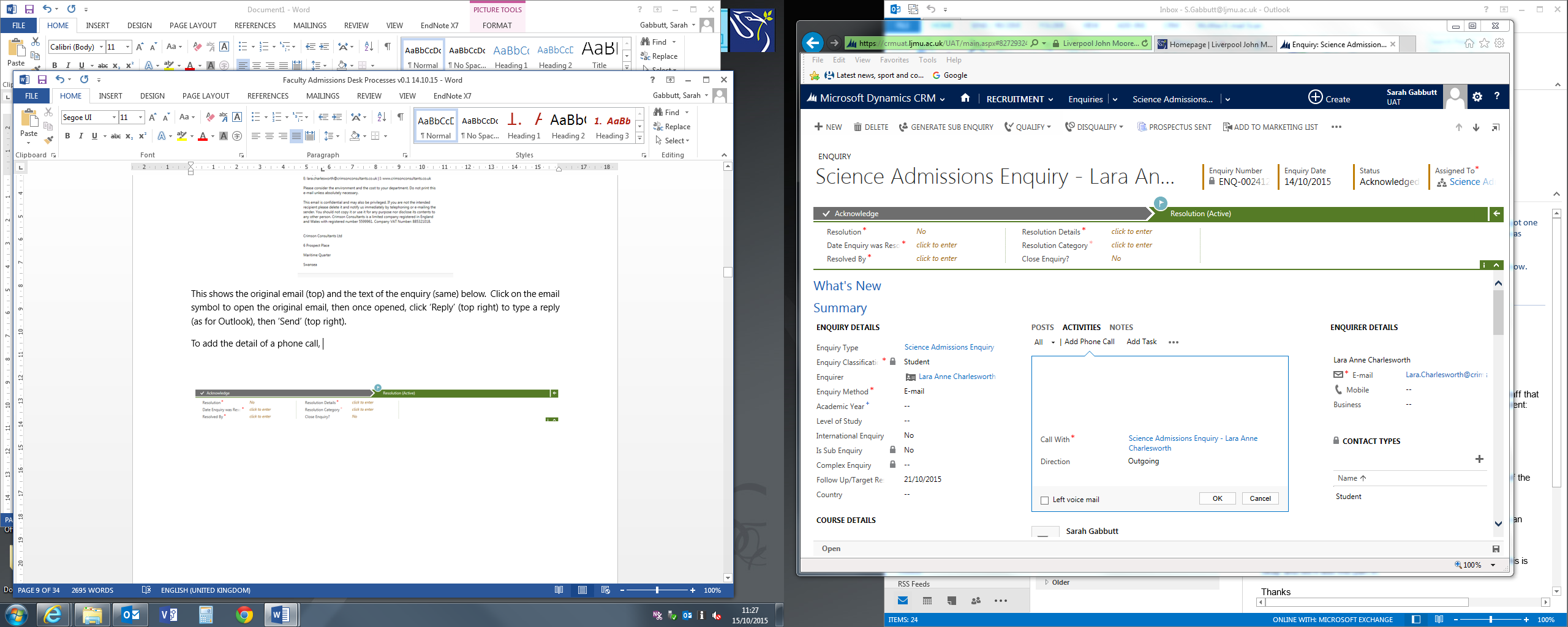
* Select the correct Template.



* Click onto the selected template and then **‘Select’.**
* If you need a Template setting up then please contact Helpdesk.

### 3.10. Adding Phone calls

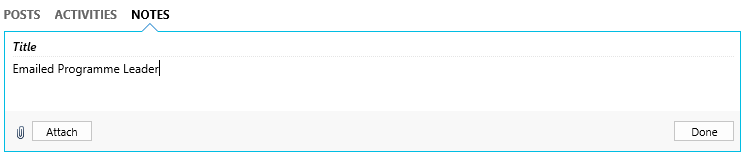
* To add the detail of a phone call, click on the Activities pane, and ‘Add Phone Call’:



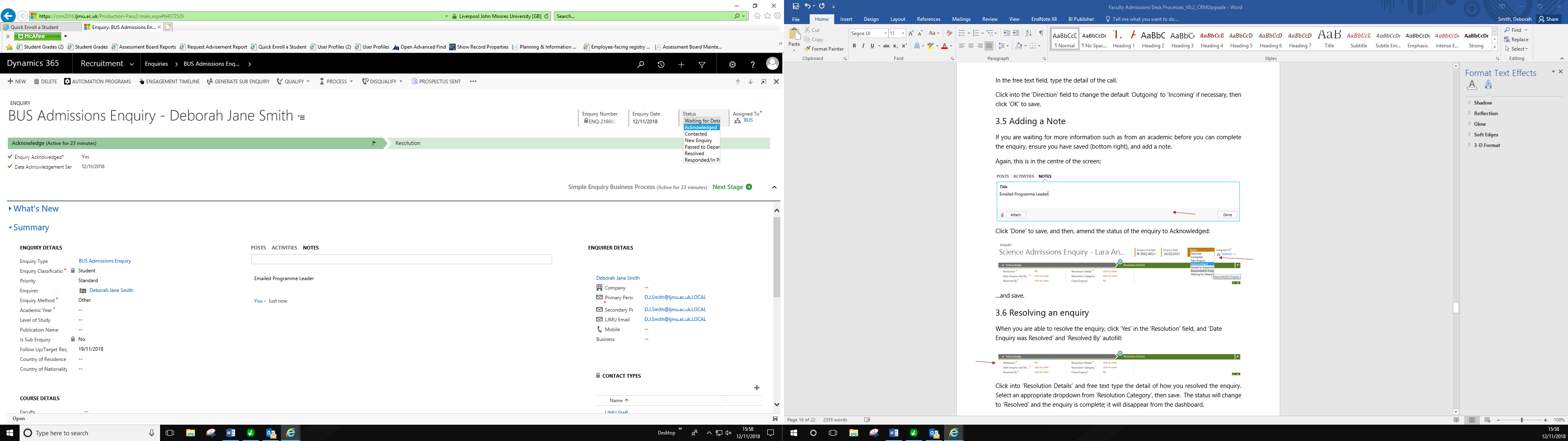
* In the free text field, type the detail of the call.
* Click into the **‘Direction’** field to change the default **‘Outgoing’** to **‘Incoming’** if necessary, then click **‘OK’** to **Save.**

## 3.11. Adding a Note

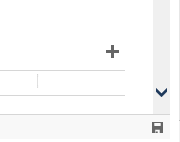
* If you are waiting for more information such as from an academic before you can complete the enquiry, ensure you have saved (bottom right), and add a note.
* Again, this is in the centre of the screen:



* Click ‘**Done’** to save, and then, amend the status of the enquiry to **Acknowledged**:

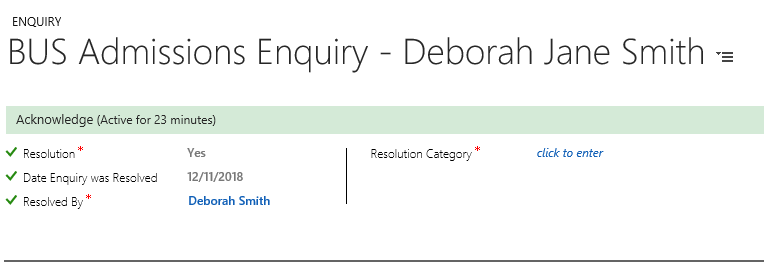


* Click Save (bottom right)

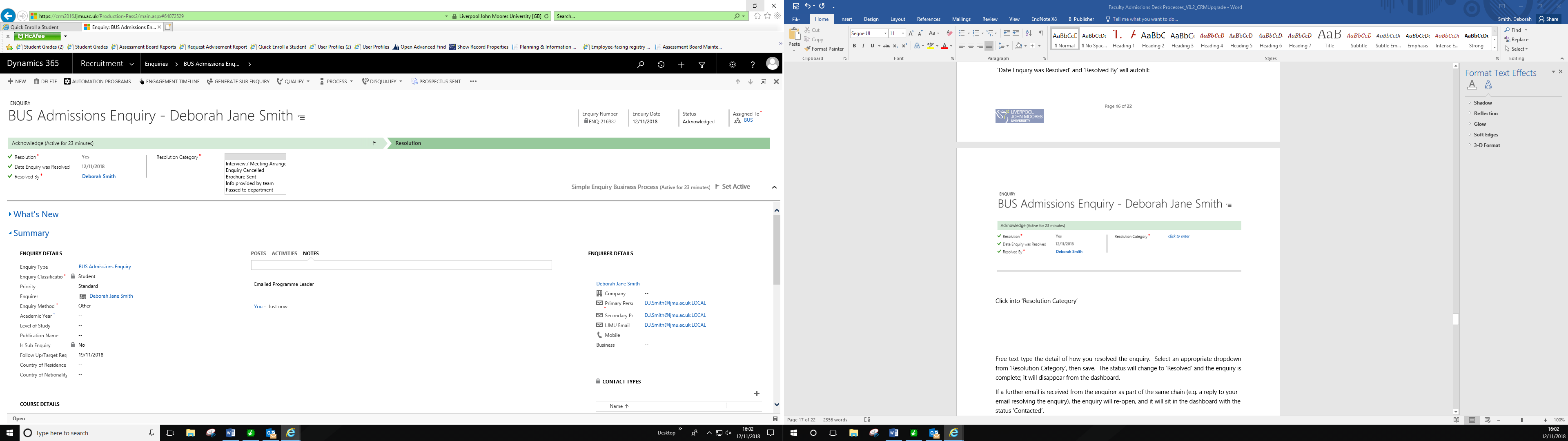


## 3.12. Resolving an enquiry

* When you have replied and completed everything you need to, you are able to resolve the enquiry, click ‘**Yes’** in the ‘**Resolution’** field, and ‘**Date Enquiry** was **Resolved’** and ‘**Resolved By’** autofill:



* Click into ‘**Resolution Category’**
* Select the correct Category from the options given in the drop down.

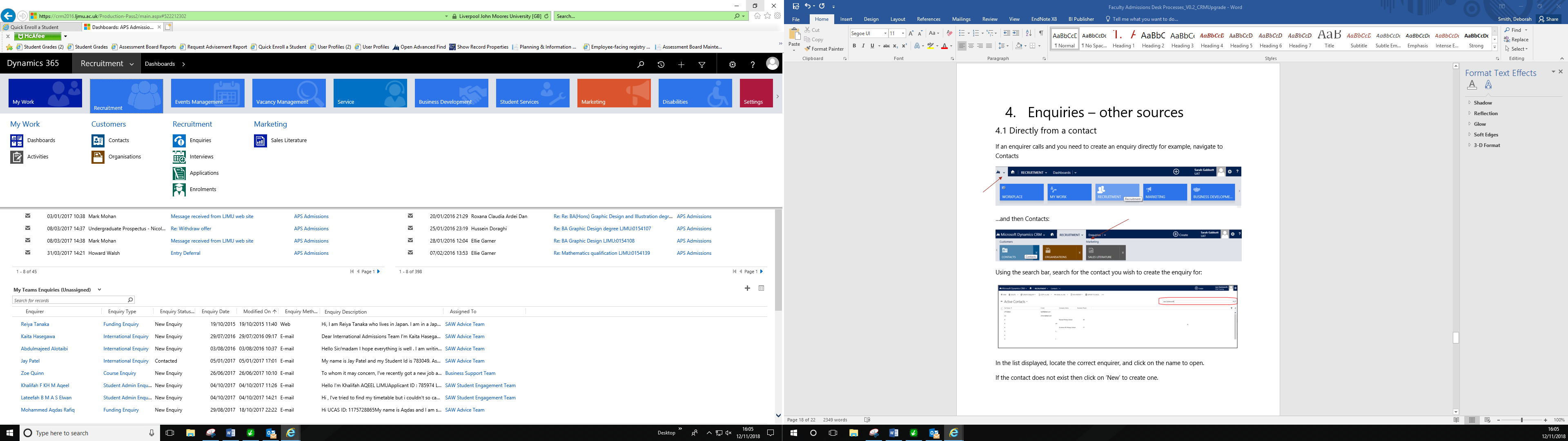


* Click **Save.**
* The status will change to **‘Resolved’**
* The enquiry is complete; and will disappear from the dashboard.
* If a further email is received from the enquirer as part of the same chain (e.g. a reply to your email resolving the enquiry), the enquiry will re-open, and it will sit in the dashboard with the status ‘Contacted’.
* If a further email is received from the enquirer but they have sent a new email (i.e. not a ‘reply’ but a new email), this will go into the dashboard as new email, and require a new enquiry creating.

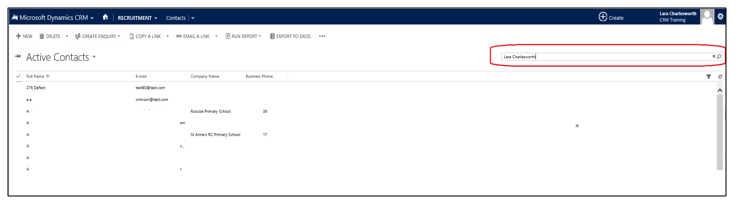
# 4. Enquiries – from other sources

## 4.1. Directly from a contact

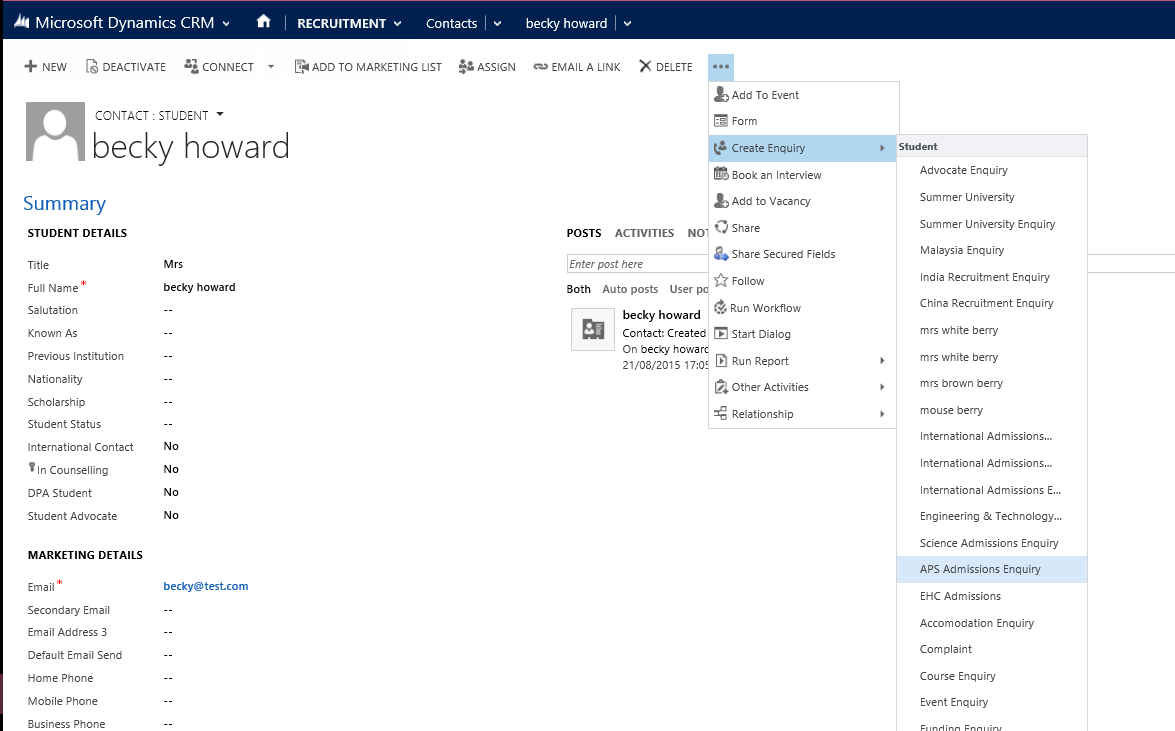
* If an enquirer calls and you need to create an enquiry directly for example, navigate to **Contacts**:



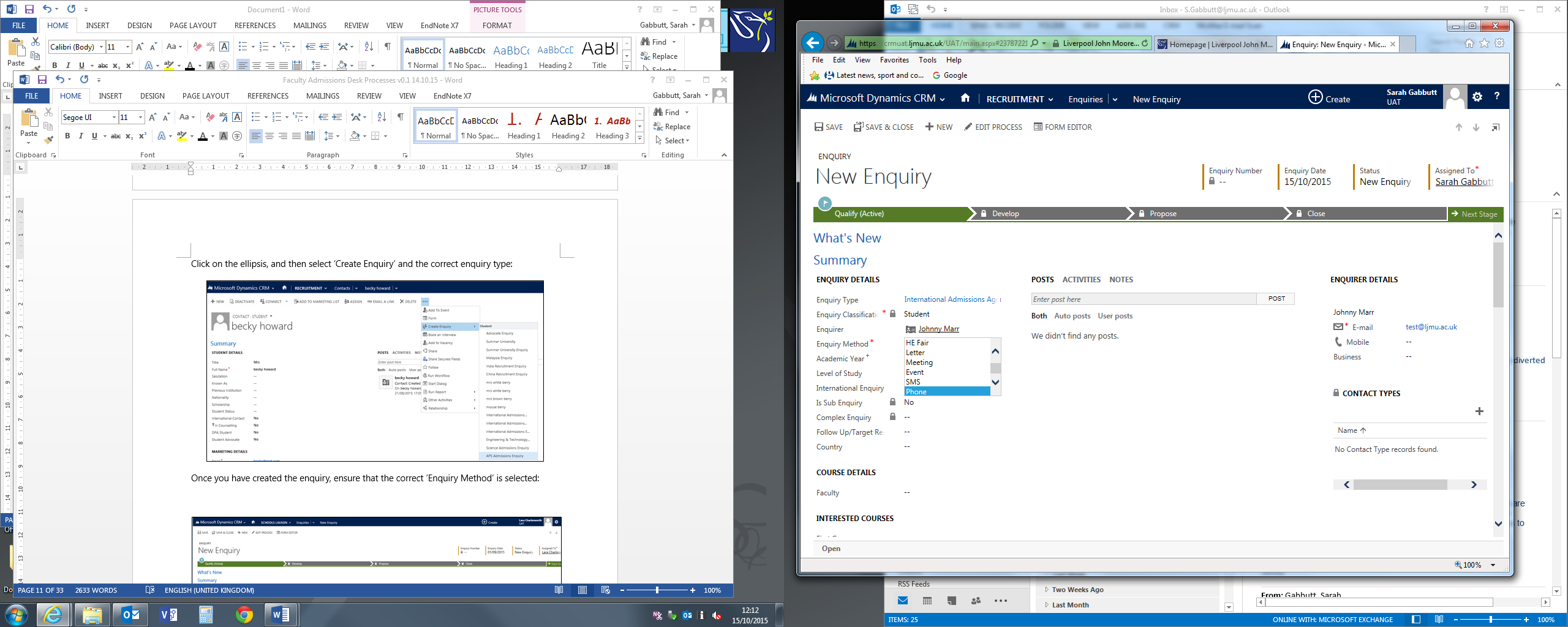
* Using the search bar, search for the contact you wish to create the enquiry for:



* In the list displayed, locate the correct enquirer, and click on the name to open
* If the contact does not exist then click on ‘New’ to create one.
* If creating a New Contact, you must complete certain mandatory criteria, these include:
  + - **Full Name**
    - **Primary Personal Email Address**
* Once created, you can **create your enquiry.**
* From the contact record, click on the **3 dots and select ‘Create Enquiry’** and the correct enquiry type:

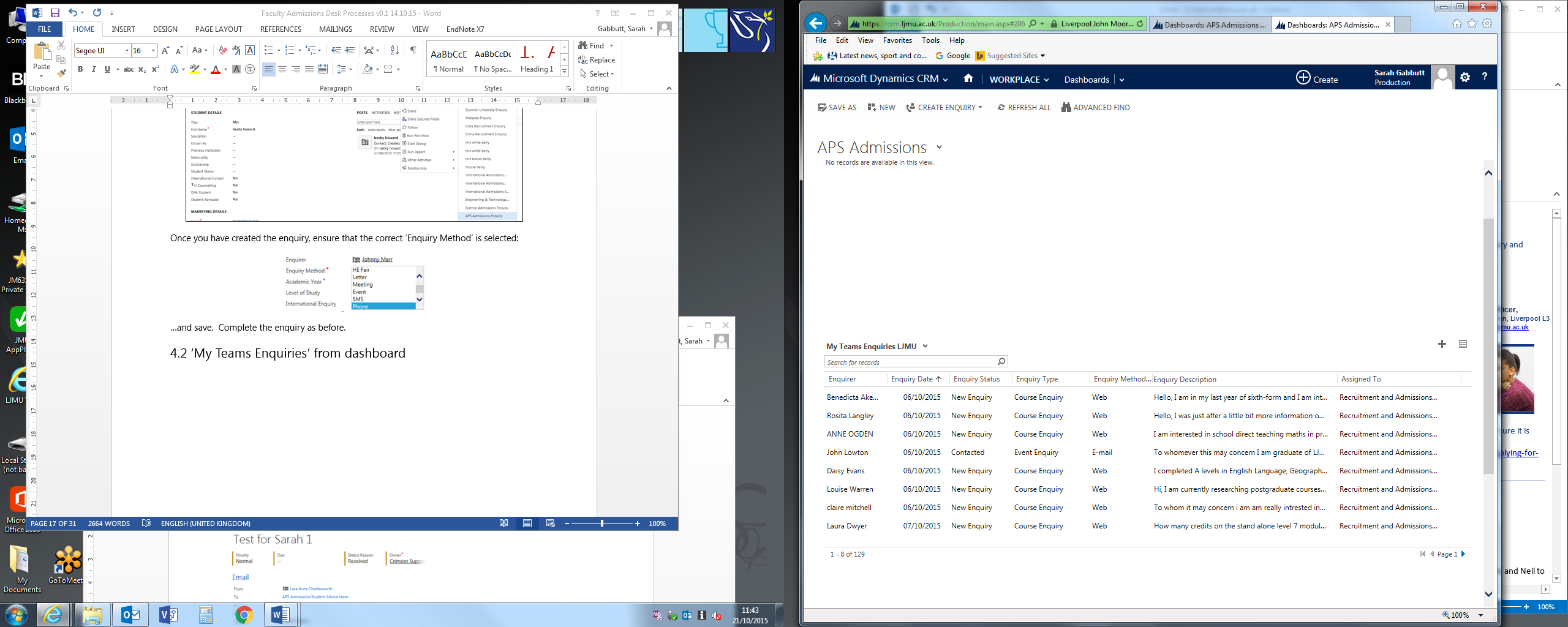


* Once you have created the enquiry, ensure that the correct **‘Enquiry Method’** is selected:



* Save
* Complete the enquiry as before.

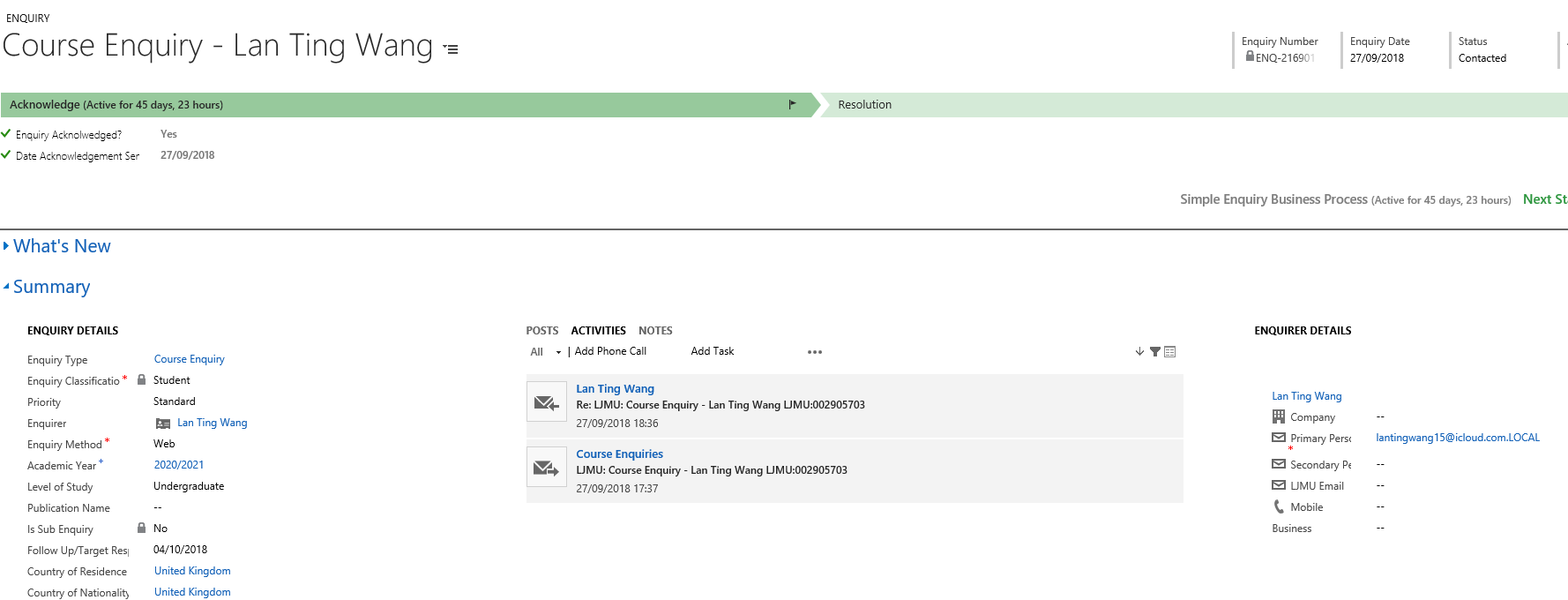
## ‘My Teams Enquiries’ from dashboard



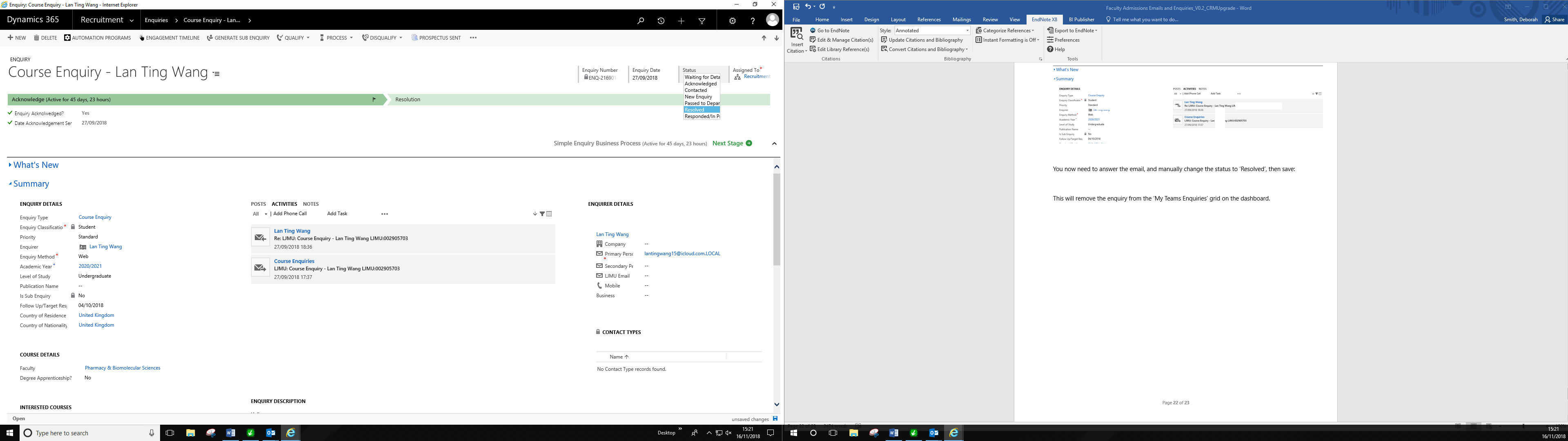
All columns can be sorted by clicking on the column title, and selecting either the up or down arrow. You can create a new enquiry from here by clicking on the ‘+’.

You can expand the view (to make searching easier for example) by clicking on the icon top right which causes the view to ‘pop out’ into a new box.

* Any enquiries with the status ‘New Enquiry’ and the method ‘E-mail’ are those that have just been converted from an email.
* Any enquiries with the status ‘New Enquiry’ and the method ‘Web’ are those that have originated from the web enquiry form on the LJMU website, and have been redirected by the Course Enquiries Team. CRM will automatically create an ‘outgoing’ email. This outgoing email will be from the queue that is associated to the enquiry type.
* Any enquiries with the status ‘Contacted’ and the method ‘E-mail’ are those that have just been converted from an email, answered and resolved, and the enquirer has sent another email in regarding the same matter. When you have read and decided on an appropriate response (e.g. phone call, another email, no response required), you will need to manually change the status from ‘Contacted’ to ‘Resolved’ – this does not happen automatically. If you don’t do this, the enquiry will sit in the bottom pane and not disappear.



You now need to answer the email, and manually change the status to ‘Resolved’, then save:



This will remove the enquiry from the ‘My Teams Enquiries’ grid on the dashboard.

# Version Control

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Version** | **Author** | **Change from last version** |
| 22.10.15 | v0.1 | SG | Draft |
| 23.10.15 | v0.2 | SG/CP | Added 5.7 cancelling an event registration & associated booking (author Cathy Pepp), moved 5.7 completing the event to 5.8 |
| 29.10.15 | v0.3 | SG | Addition to 1.3.1 & 4.2 |
| 30.10.15 | v1 | SG | Baseline |
| 02.02.2016 | V1.1 | AGP | Added data for post event attendance. |
| 06.04.2017 | V1.2 | AGP | Minor updates |
| 18.04.2017 | V1.3 | NA | Updated the email enquiry process in 3.1 |
| 19.04.2017 | V1.4 | NA | Minor updates |
| 13/11/2018 | V1.5 | DS | DS Updated Layout & numbering  Removed Events to separate document  Refreshed all screenshots in line with Upgrade to CRM 2016 |
| 18/02/2019 | V1.6 | DS | Amended Engineering and Technology Dashboard to FET Admissions Dashboard. |