# [Image result for liverpool john moores university logo](https://www.google.co.uk/url?sa=i&rct=j&q=&esrc=s&source=images&cd=&cad=rja&uact=8&ved=0ahUKEwjZuerSu4nXAhWGchQKHbT9CwIQjRwIBw&url=https://www.eventbrite.co.uk/o/liverpool-john-moores-university-roscoe-lectures-3233158788&psig=AOvVaw2rEDE_dQz3fMXV7J1A9n9g&ust=1508941556822069)

# Process Document

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**CRM – Student Advice & Wellbeing**

Liverpool John Moores University

**Student Advice Wellbeing:**

**Creating a Contact**

Version 0.1, October 2015

Author: DS Business Support Team

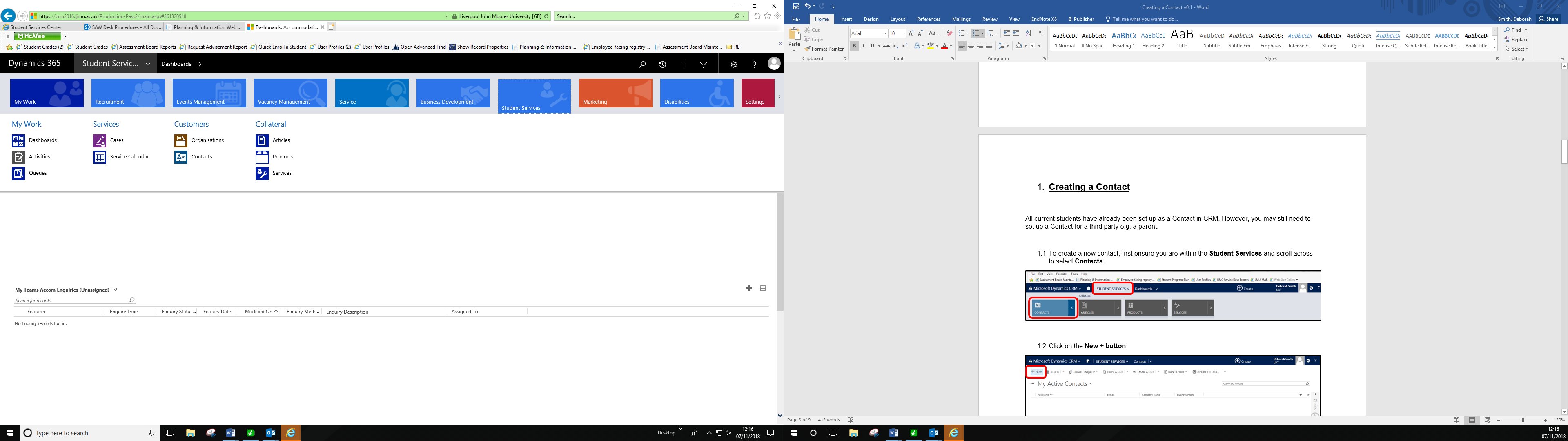
**Contents**

1. **Creating a Contact**
2. **Marking a Student Contact with a Disability**
3. **Adding the ‘In Counselling’ flag to a students record.**

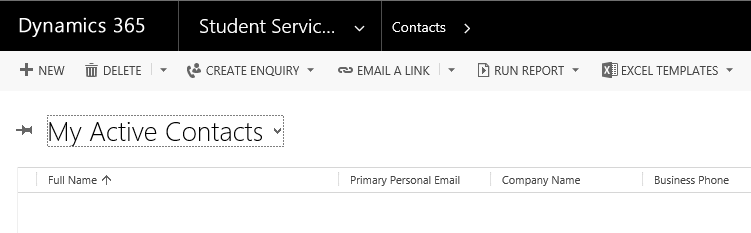
1. **Adding an Alert to a Contact.**
2. **Creating a Contact**

All current students have already been set up as a Contact in CRM. However, you may still need to set up a Contact for a third party e.g. a parent.

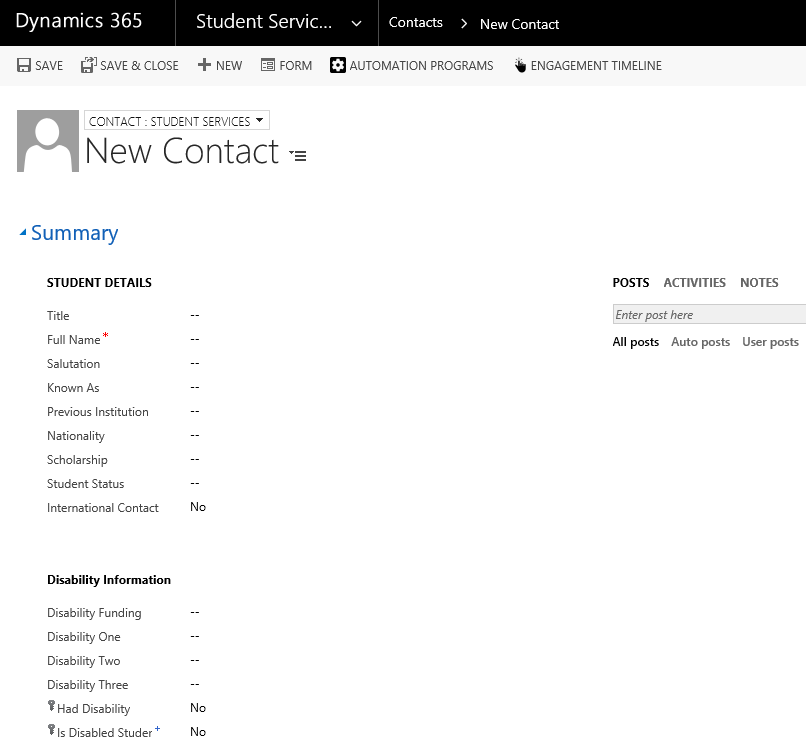
* 1. To create a new contact, first ensure you are within the **Student Services** and select **Contacts** from the **Customers** menu.



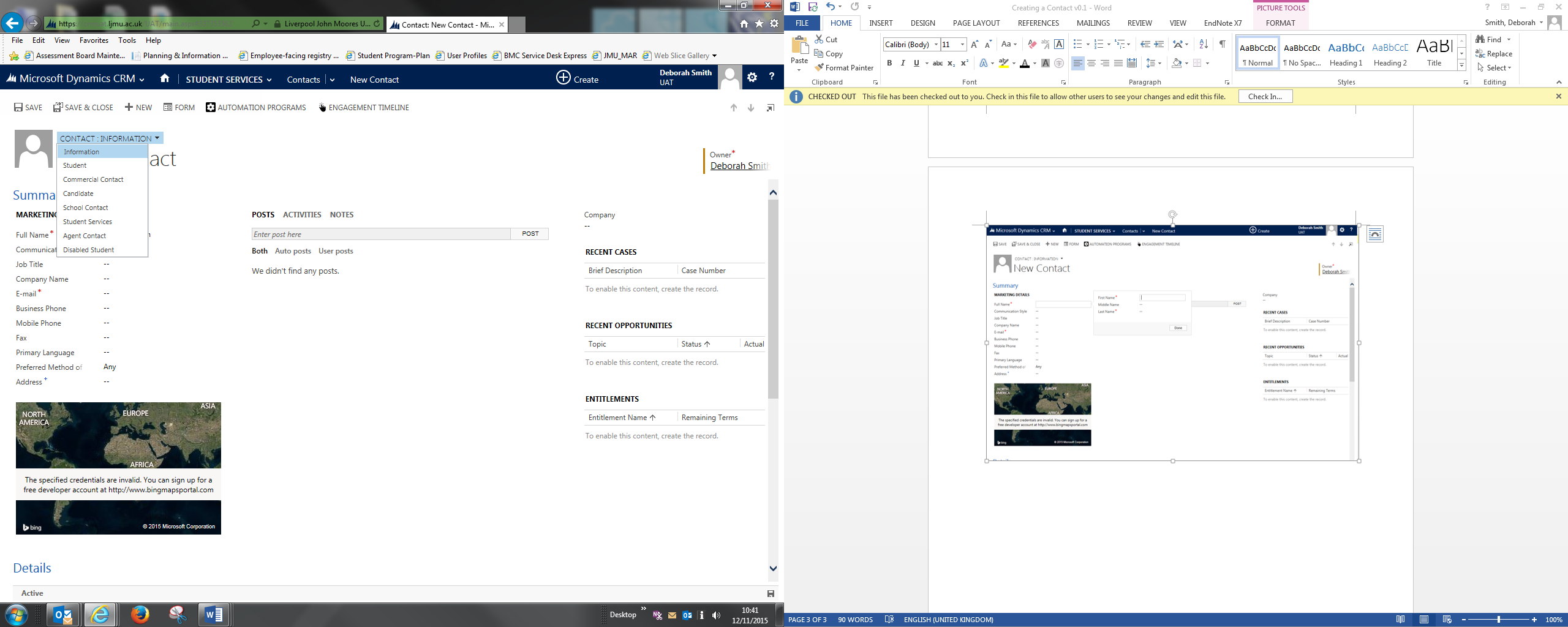
* 1. Click on the **New + button**



* 1. This will take you to the **New Contact** form.



* 1. Note that you can change the type of Contact by clicking on the drop down above **‘New Contact’**.

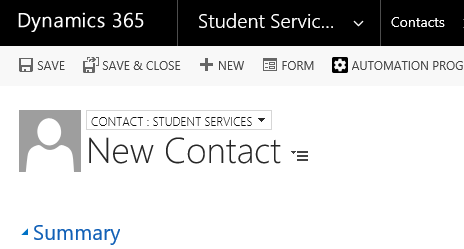


**Note: All Current Students have been created as a Student Services Contact type.**

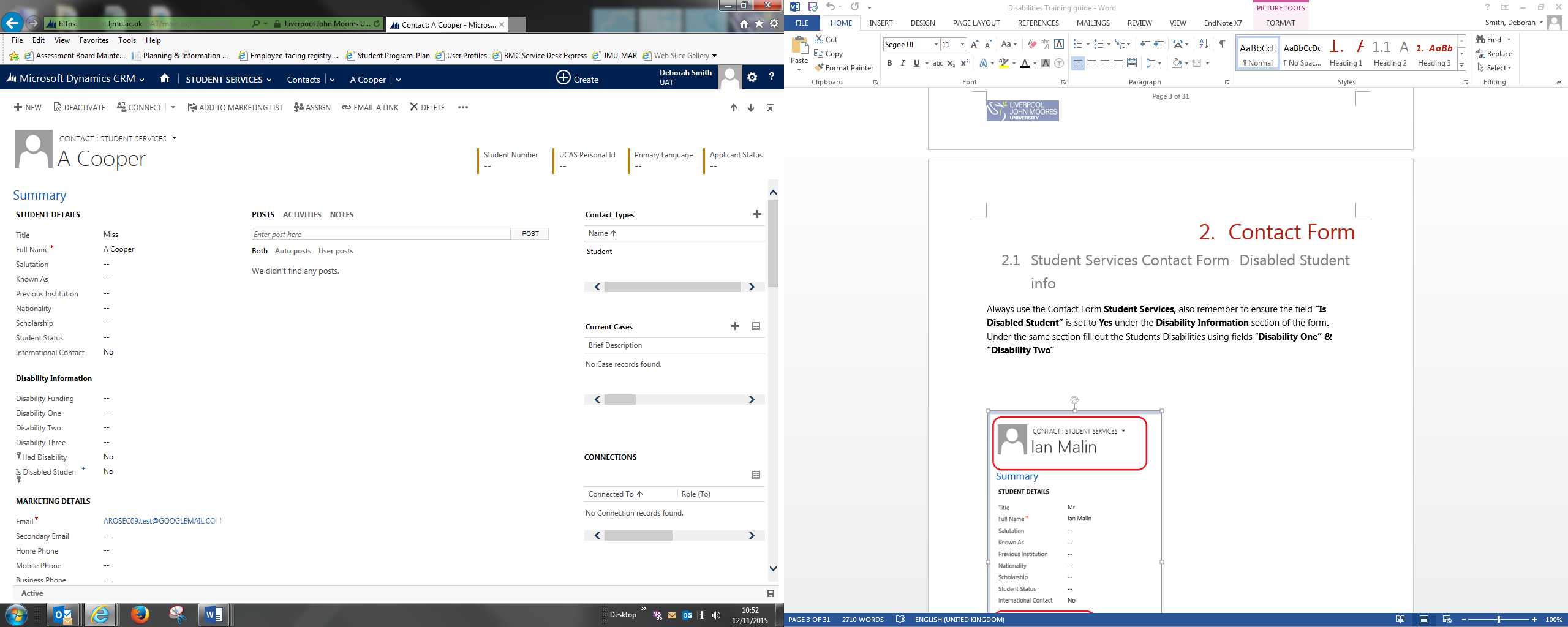
* 1. Depending on the type of Contact, there will be different Mandatory fields, but you will always need to enter **Name and Email address**.
  2. Click **Save.**

**Note: Remember that Notes can be left against the Contact record, but for auditing purposes and that so a full picture can be given, all notes should be held against a Case.**

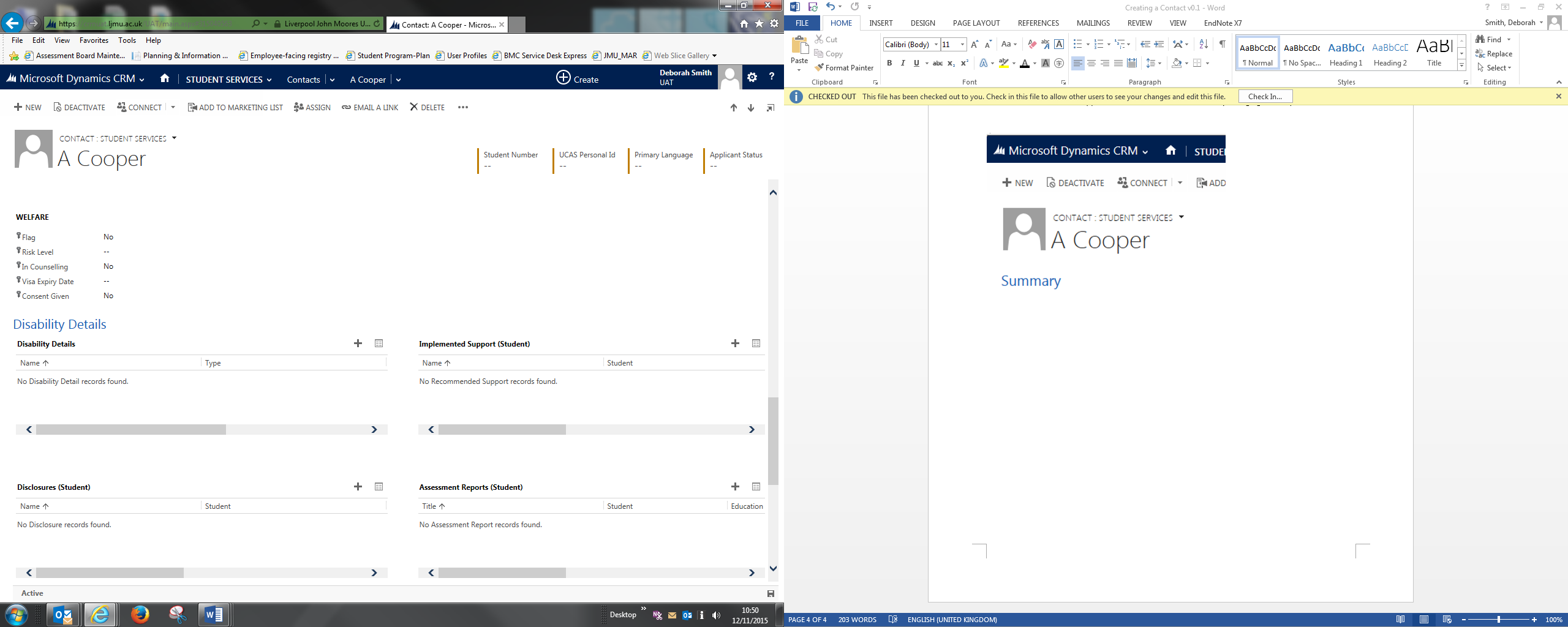
1. **Marking a Student Contact with a Disability** 
   1. Navigate to the Student’s Contact record.
   2. Ensure that the form that appears is the **Student Services form** by changing the drop down.



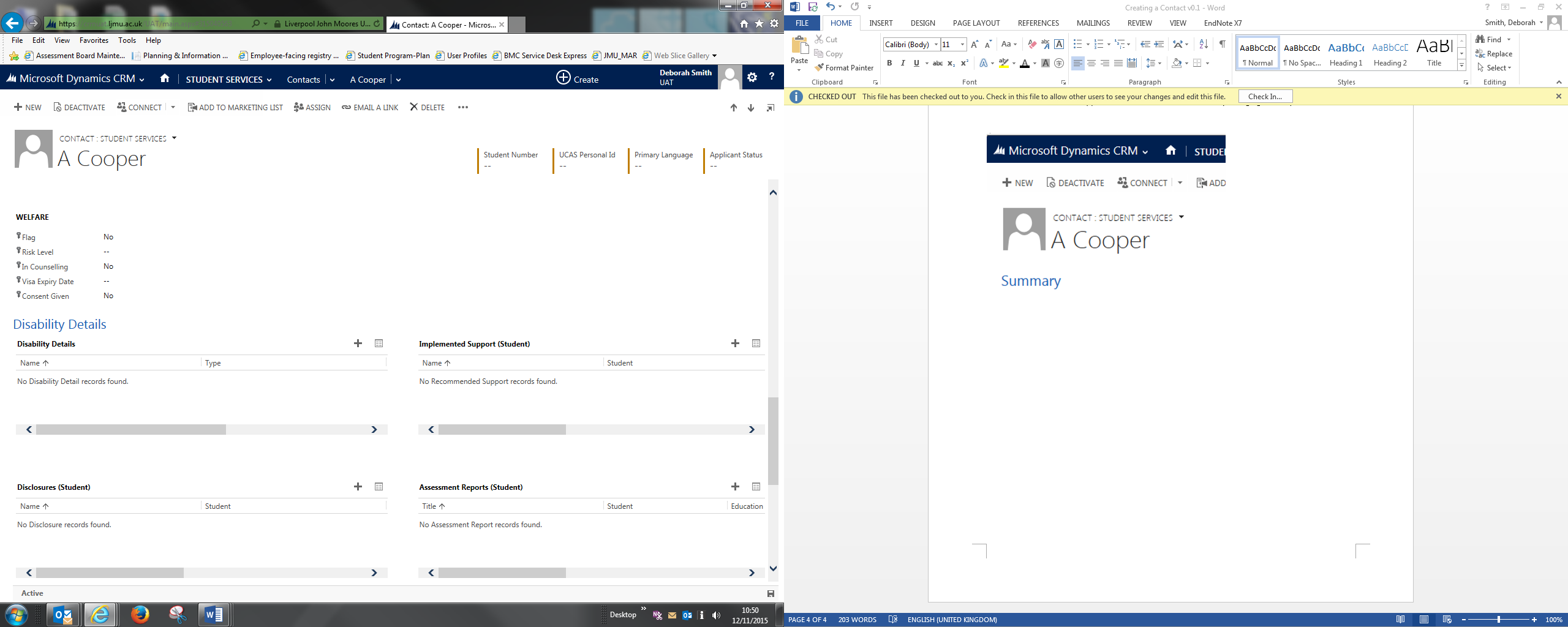
* 1. You can then add in Details of a students Disability, or mark them as in Counselling by filling out relevant fields.
  2. Details can be added under **Disability Information**:



* 1. The **Disability Details** section:



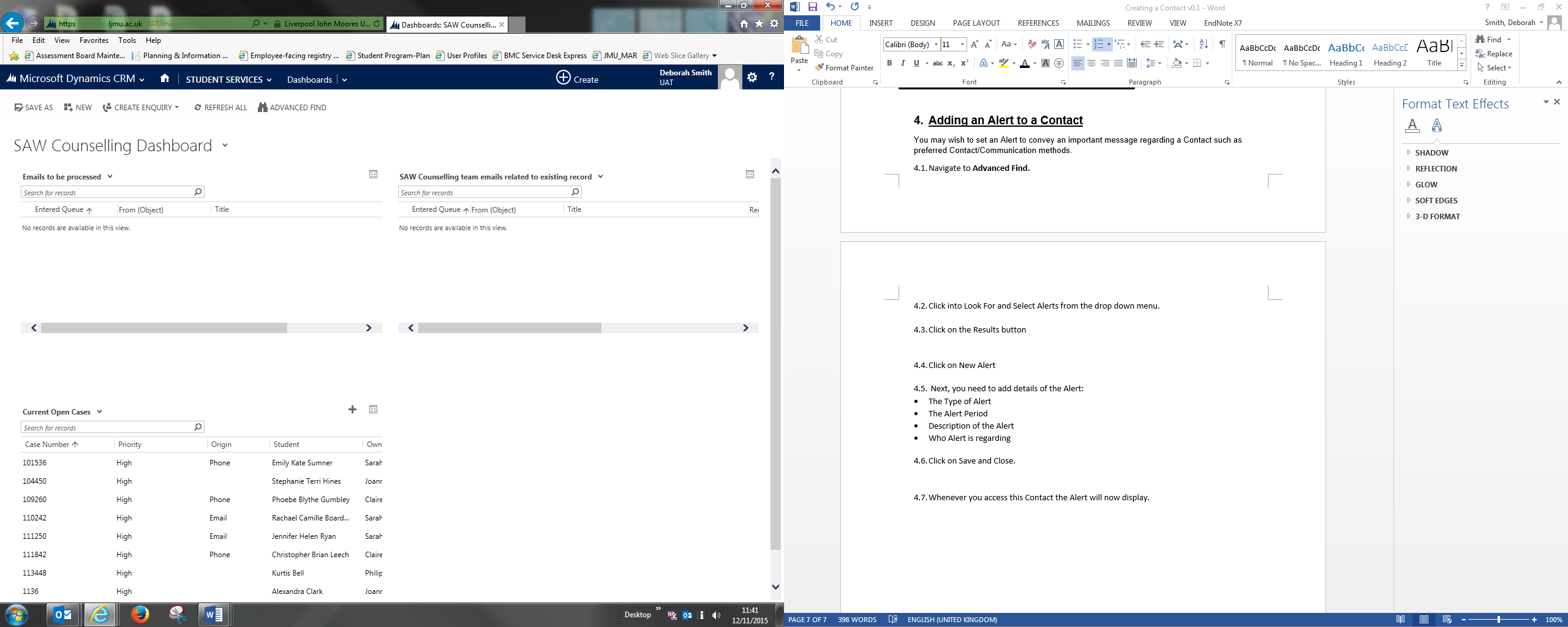
1. **Adding the ‘In Counselling’ flag to a students record.** 
   1. Ensure that the In Counselling flag is ticked in the Welfare section of the students Contact form.



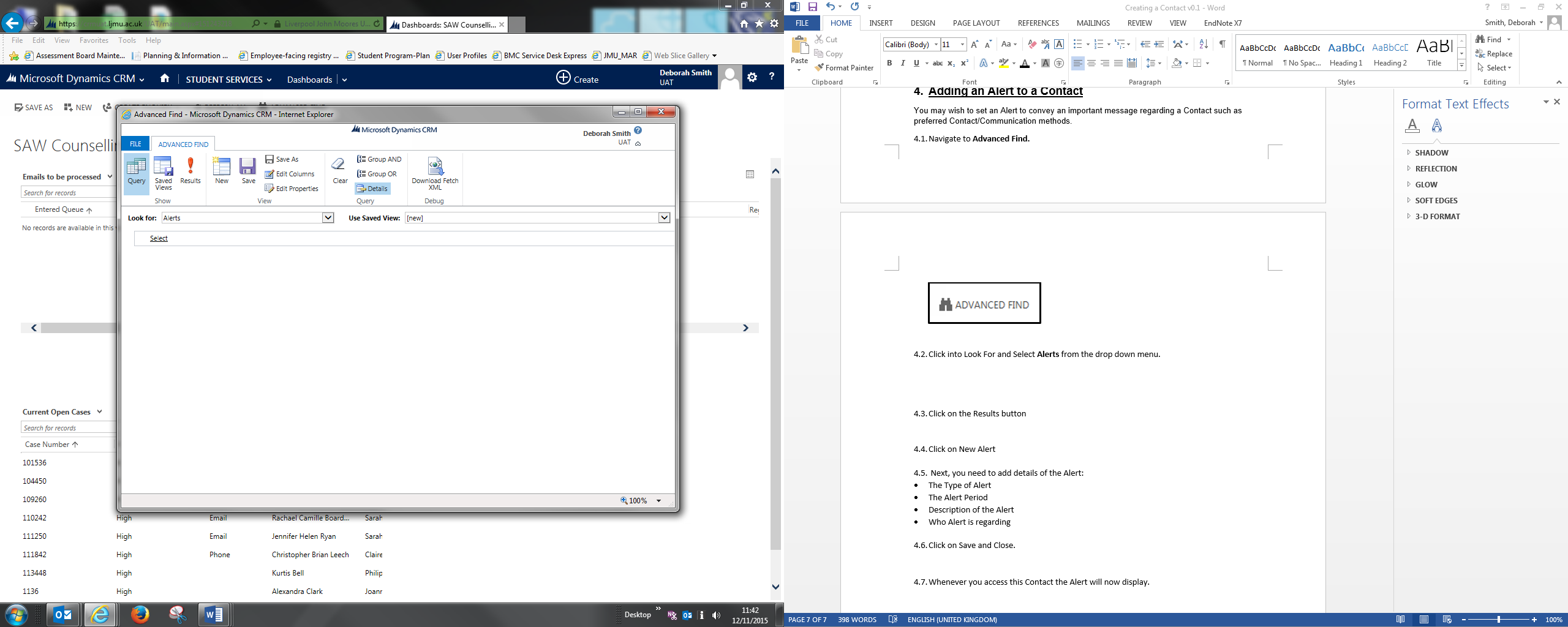
1. **Adding an Alert to a Contact**

You may wish to set an Alert to convey an important message regarding a Contact such as preferred Contact/Communication methods.

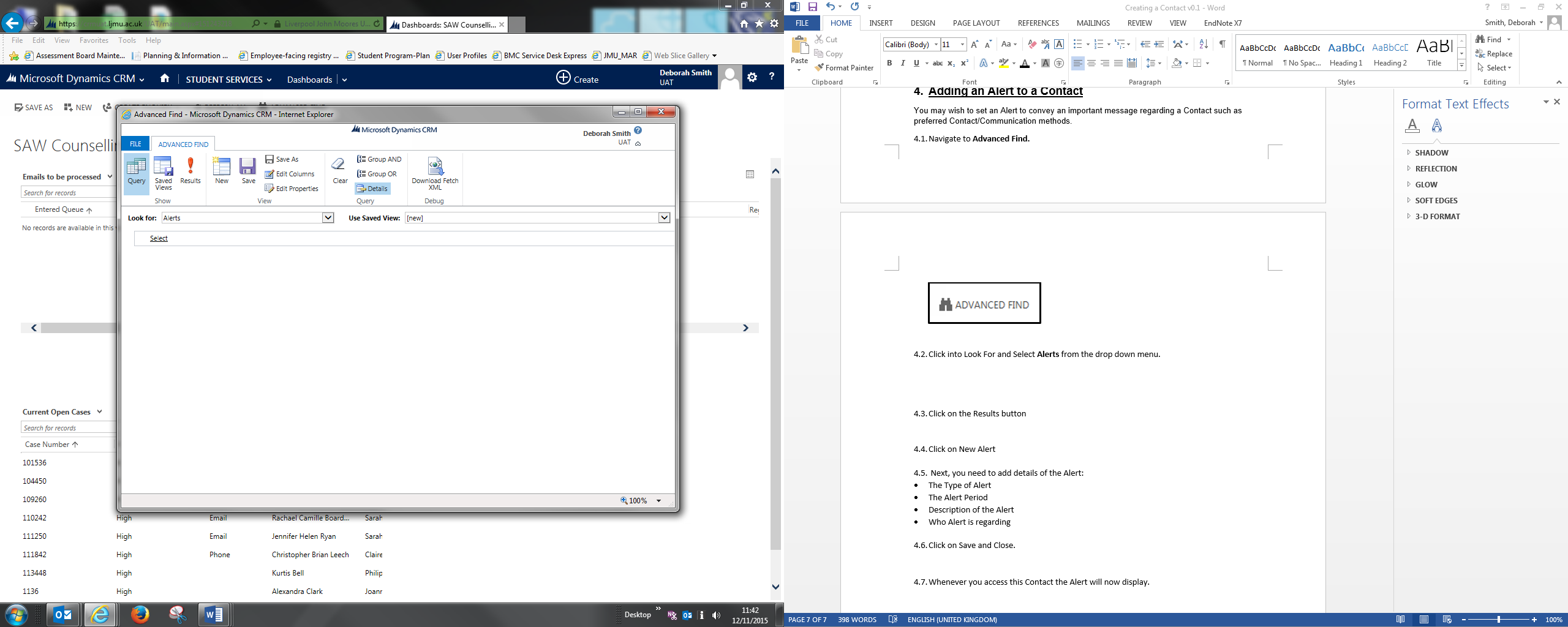
* 1. Navigate to **Advanced Find.**



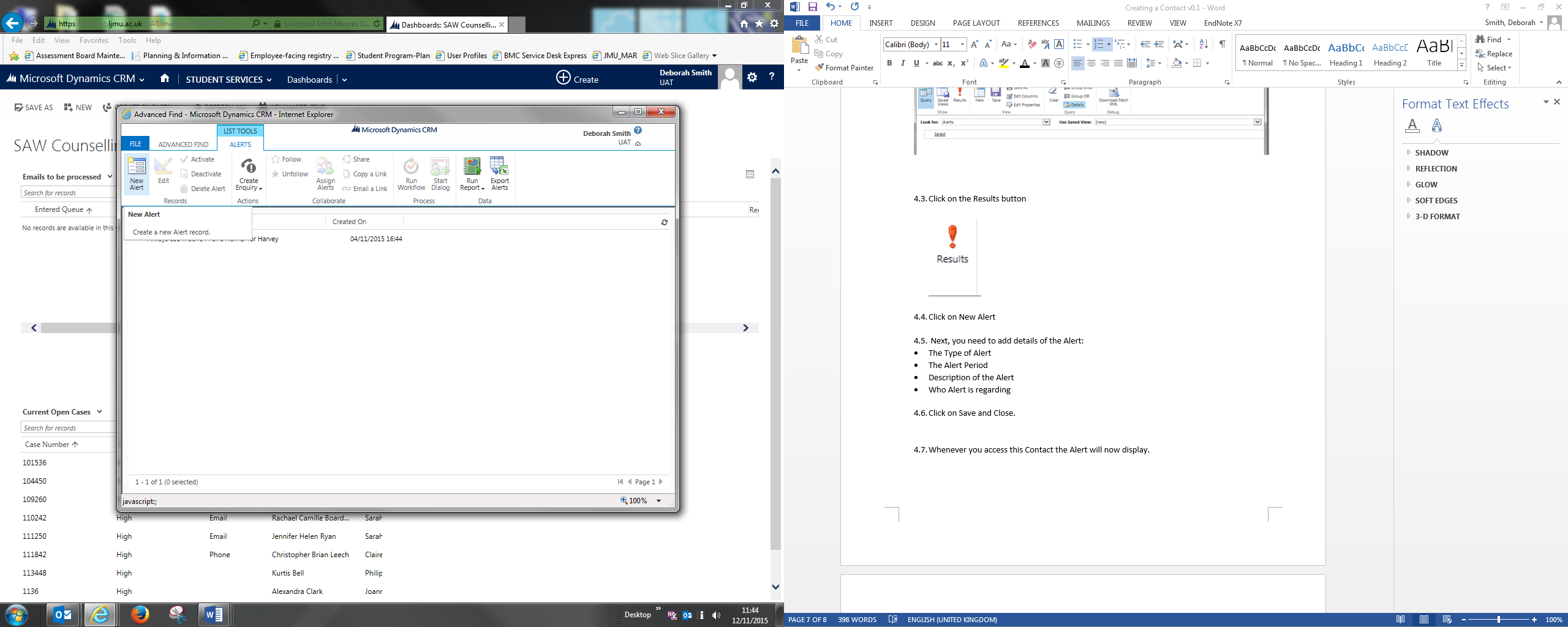
* 1. Click into Look For and Select **Alerts** from the drop down menu.



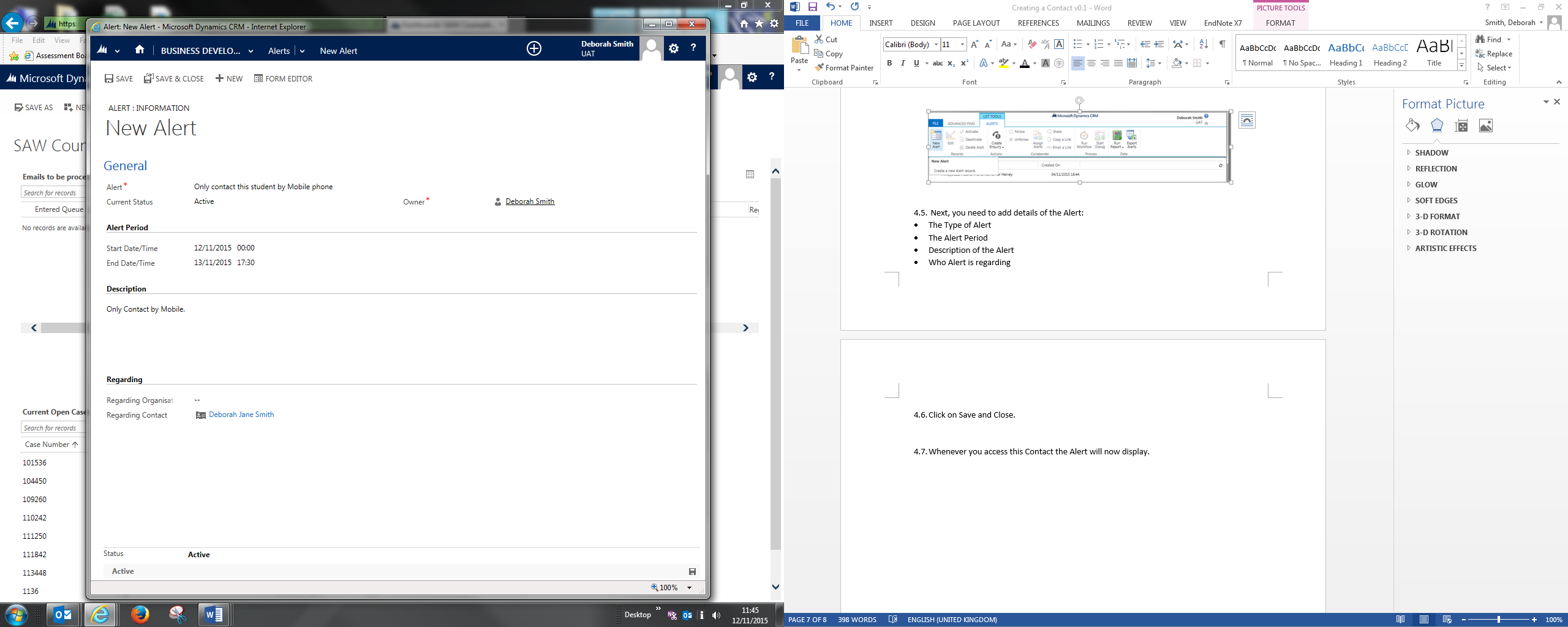
* 1. Click on the **Results** button



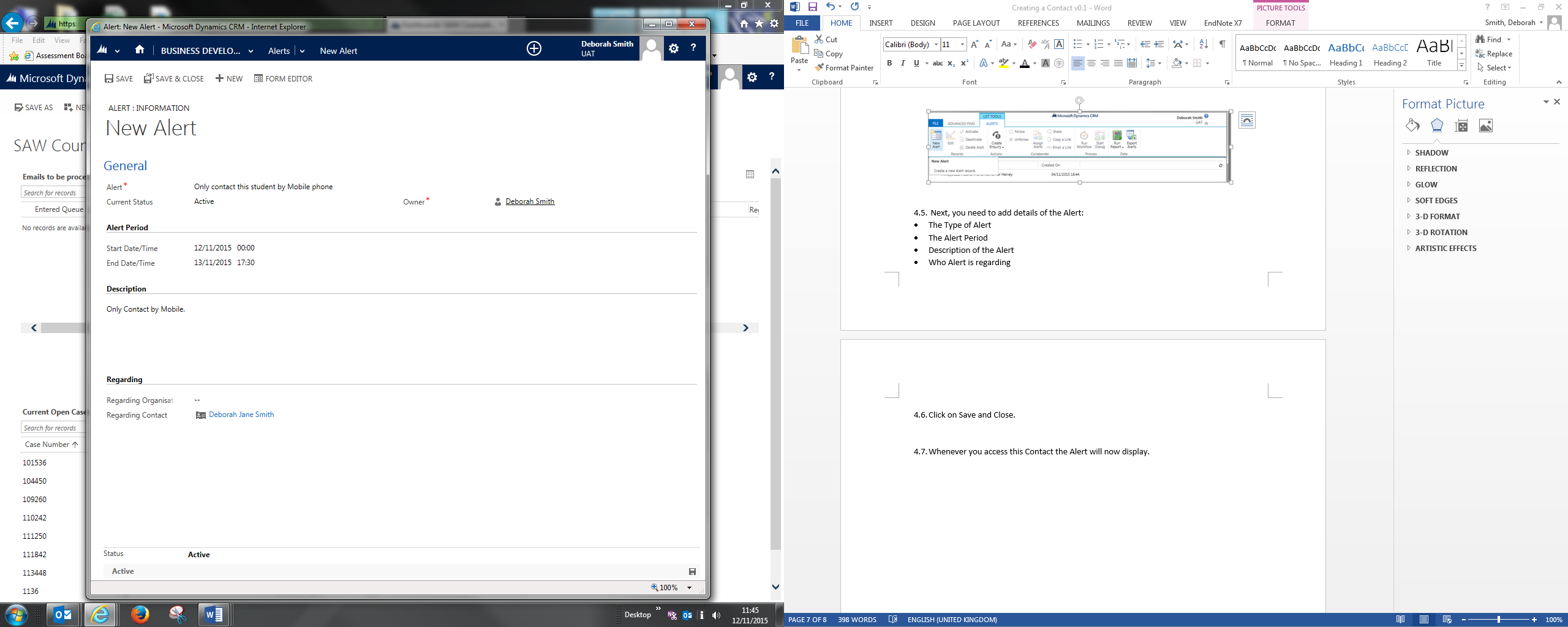
* 1. Click on **New Alert**



* 1. Next, you need to add details of the Alert:
* **The Type of Alert**
* **The Alert Period**
* **Description of the Alert**
* **Who Alert is regarding**



* 1. Click on **Save and Close**.



* 1. Whenever you access this Contact the Alert will now display.

1. 