# [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

**CRM – Student Advice & Wellbeing**

Liverpool John Moores University

**Student Advice and Wellbeing:**

**Searching for Contacts in CRM**

Version 0.5, November 2018

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**Introduction**

This document will cover various processes for searching for Contacts, Cases and Queues.

1. **Searching for a Contact using a Student ID**

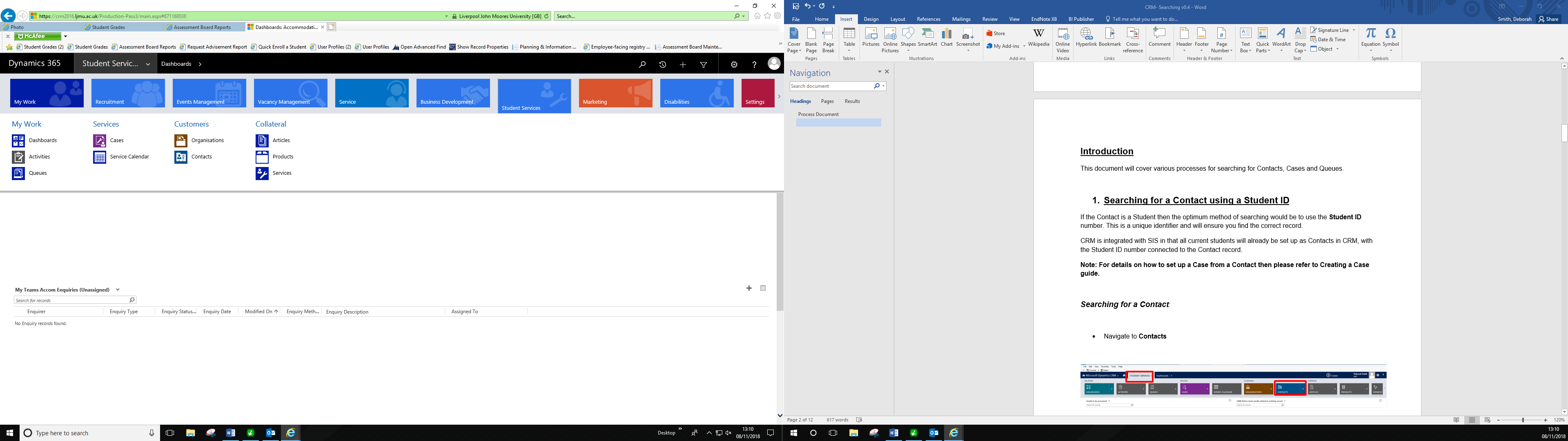
If the Contact is a Student then the optimum method of searching would be to use the **Student ID** number. This is a unique identifier and will ensure you find the correct record.

CRM is integrated with SIS in that all current students will already be set up as Contacts in CRM, with the Student ID number connected to the Contact record.

**Note: For details on how to set up a Case from a Contact then please refer to Creating a Case guide.**

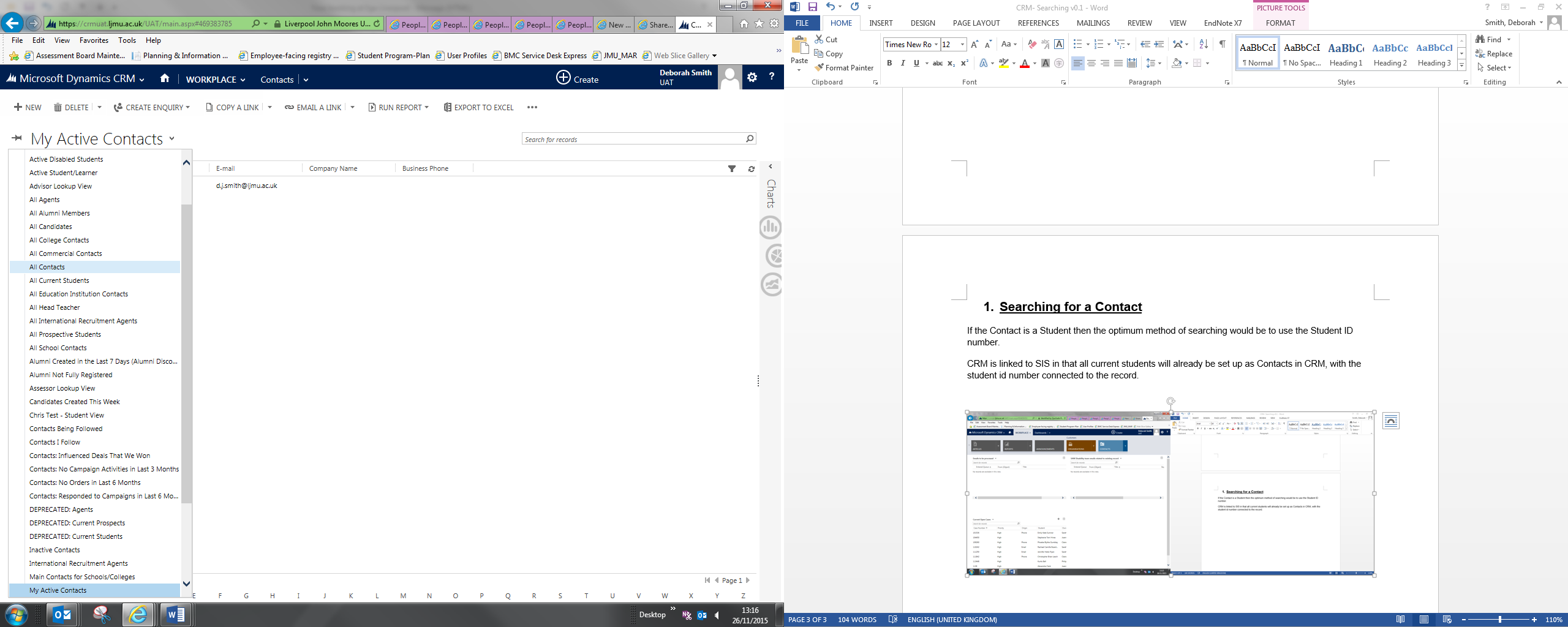
***Searching for a Contact***:

* Click on Student Services on top bar.
* Click on Contacts



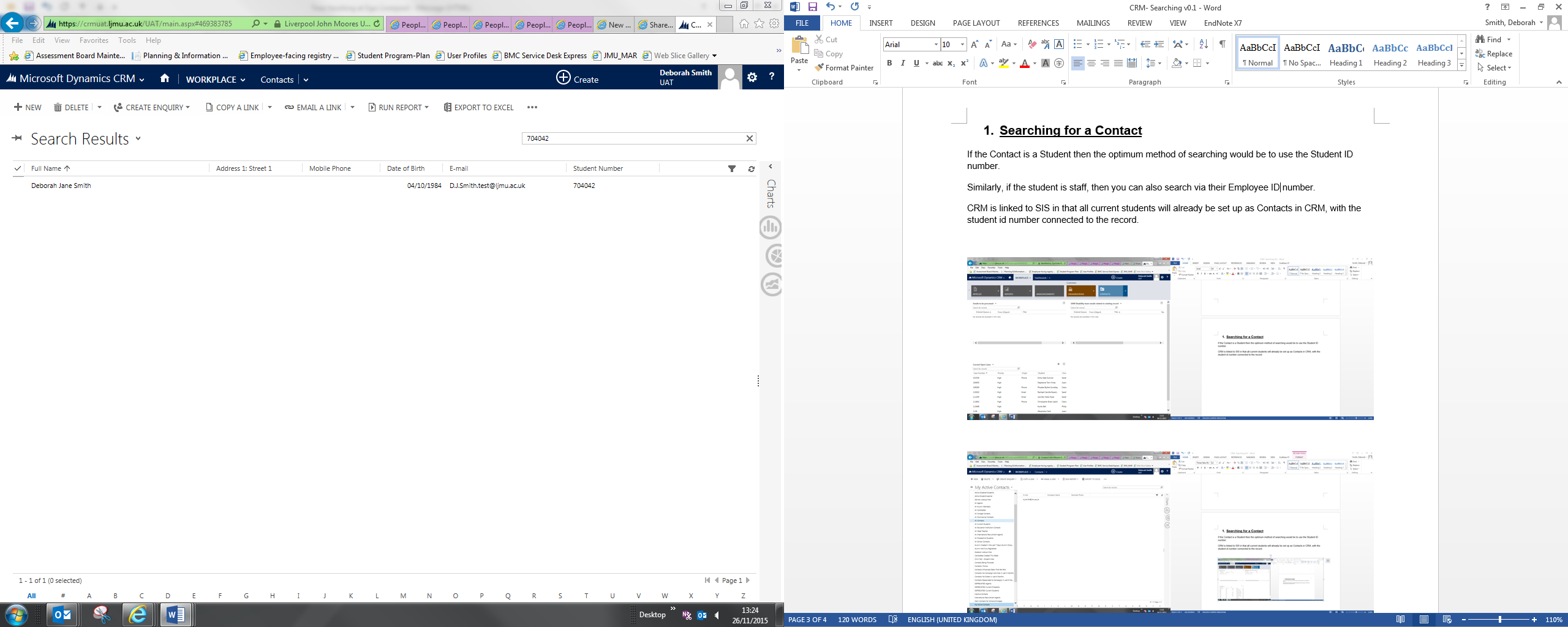
* On the left hand side, the view will be set to **‘My Active Contacts’**
* Click on the downward arrow to bring up the full list of Views available.
* Select **All Contacts**.

**Note: There are various views available on this list, which if selected, may narrow down the search. E.g. All Current Students.**



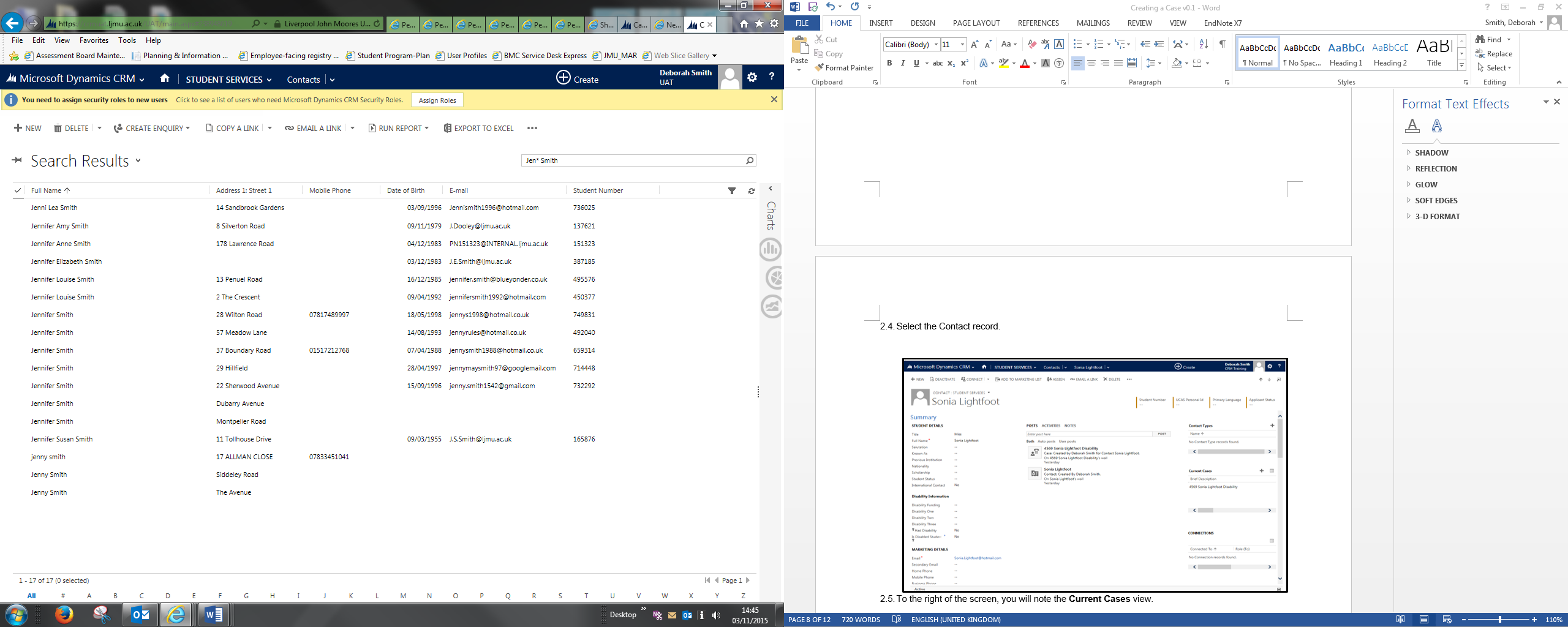
* In the search box to the right, enter the **Student ID** number and click **Enter.**

* This should only bring up one (correct) record.



1. **Searching for a Contact using the Wildcard Function**

* If you do not know the Student Number or the Contact is not a Student, you can also search via the wildcard function:
* In CRM, the wildcard function is an asterisk ‘ \* ’
* CRM requires the full name to be entered to bring back search results, this includes middle names.
* The wildcard function can therefore be used in place of the middle name if you do not know it.
* Enter the wildcard between the first name and surname as shown below:



**Note: If the contact has a name that could be spelled in different ways or can be shortened, then you may wish to search using the first few letters of the first name, as in the example above. E.G. Jen.**

1. **Searching using the Global Search.**

* Click on Look up Icon on top toolbar.



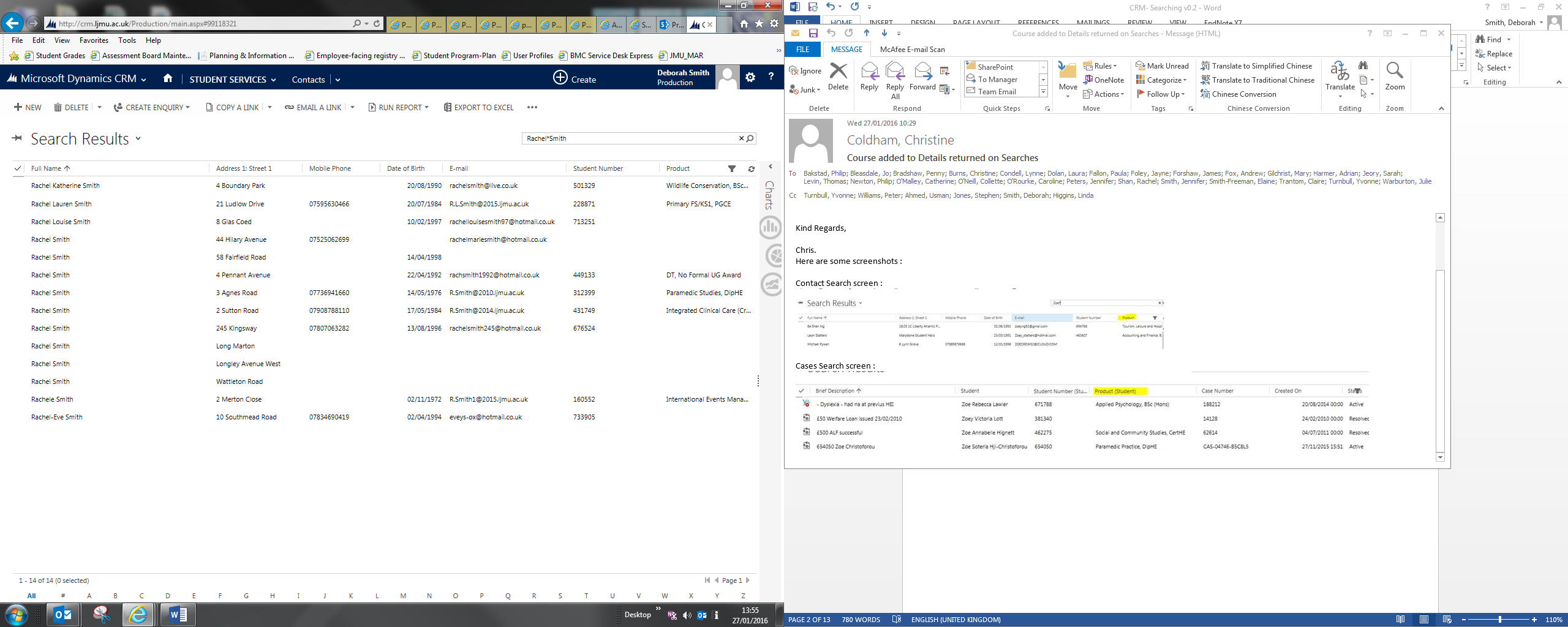
1. **Searching for a Contact or Case: Course Information.**

Course Information can now be viewed within search results for Contact or Cases. Course Information is listed as **Product (Student)**.

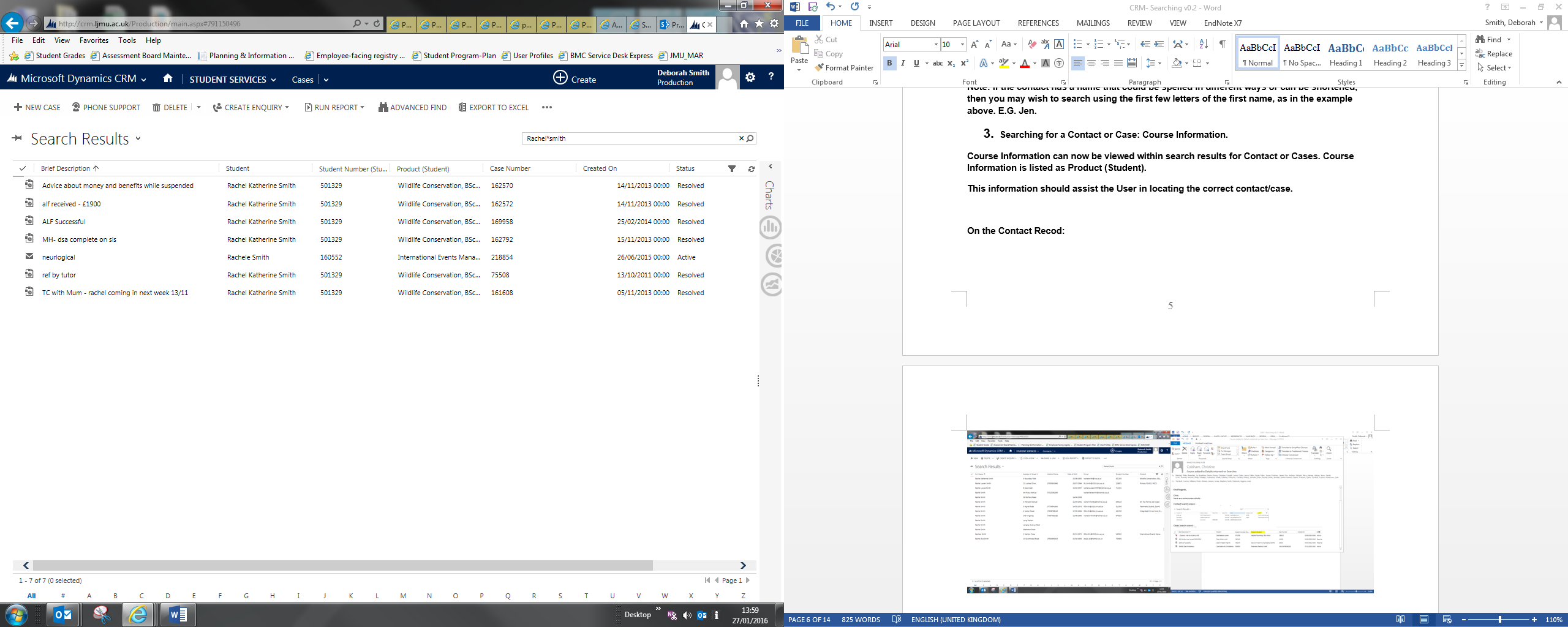
This information should assist the User in locating the correct Contact/Case.

**Please Note: In the Contact Search you can Search on ‘Course’. However, you can not search by ‘Course’ in the Cases View.**

**Contact Search:**



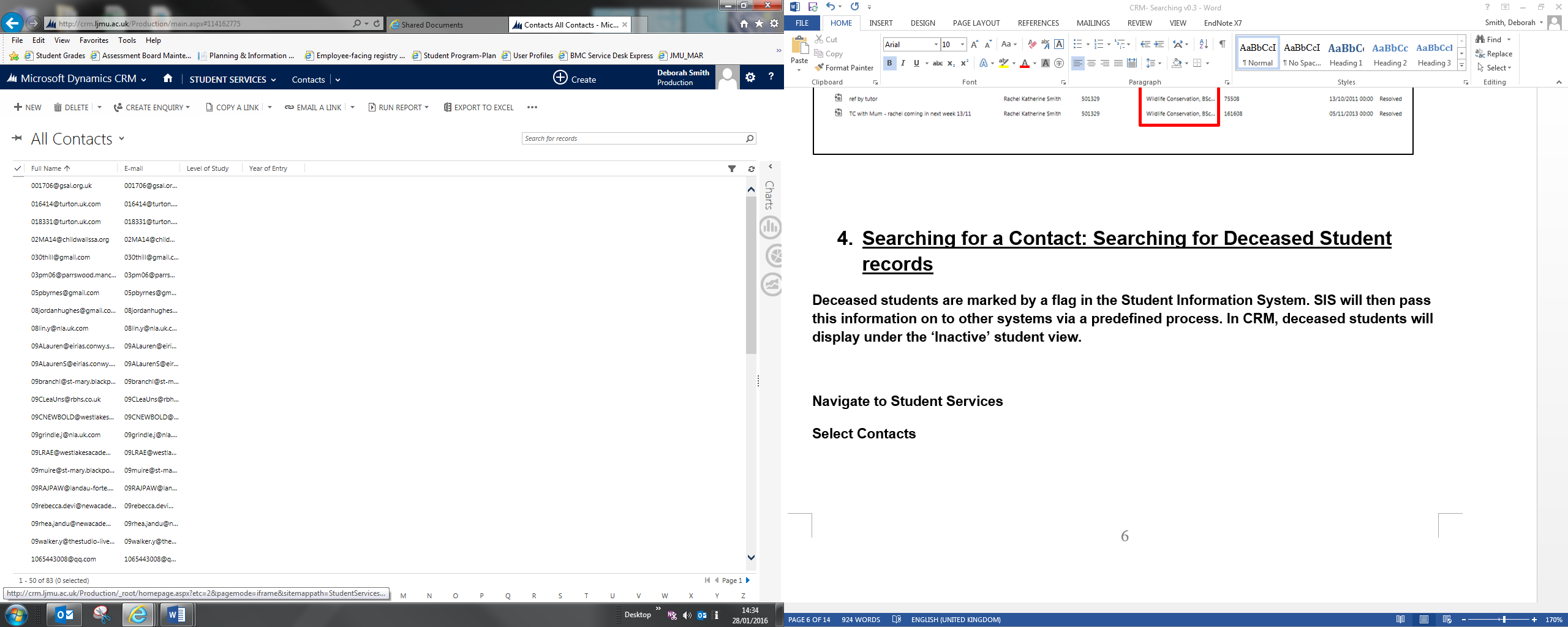
**Cases Search:**



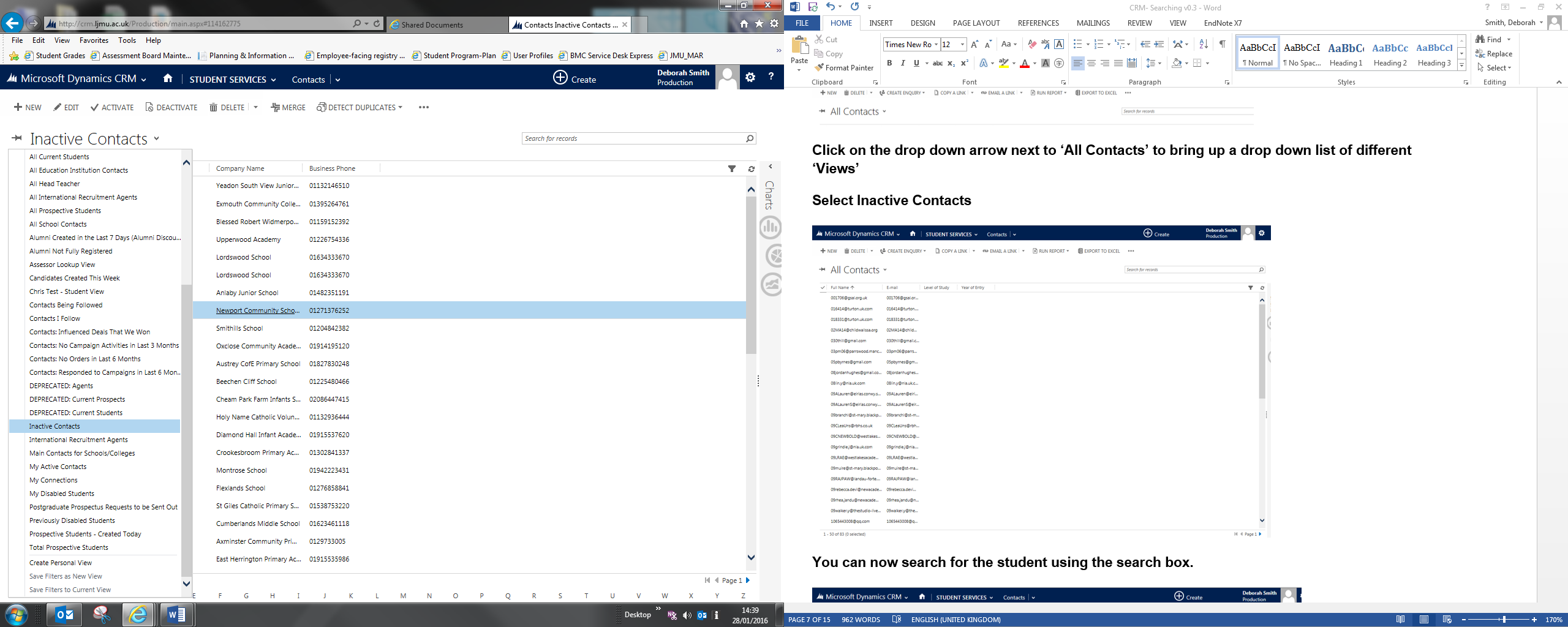
1. **Searching for a Contact: Searching for Deceased Student records**

Deceased students are marked by a flag in the Student Information System. SIS will then pass this information on to other systems via a predefined process. In CRM, deceased students will display under the ‘Inactive’ student view.

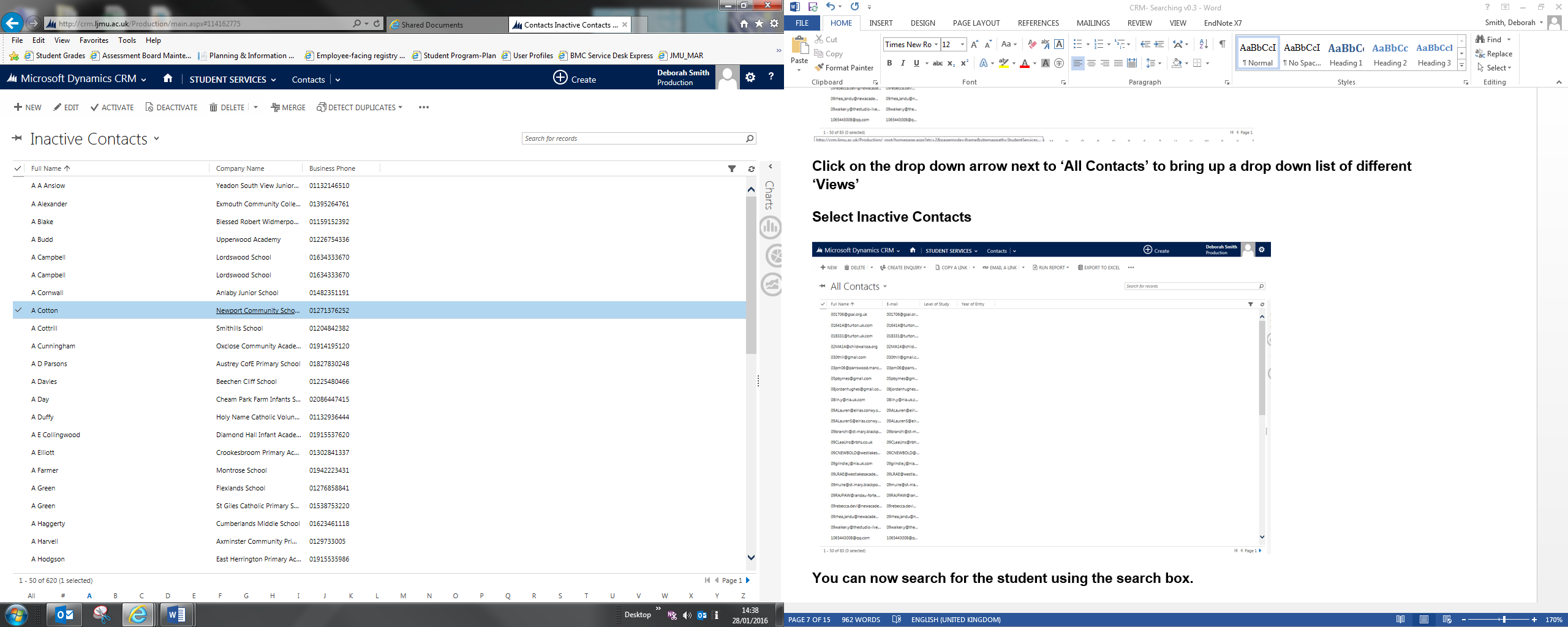
* Navigate to **Student Services** on the top ribbon.
* Select **Contacts**



* Click on the drop down arrow next to ‘**All Contacts’** to bring up a drop down list of different ‘Views’
* Select **Inactive Contacts**

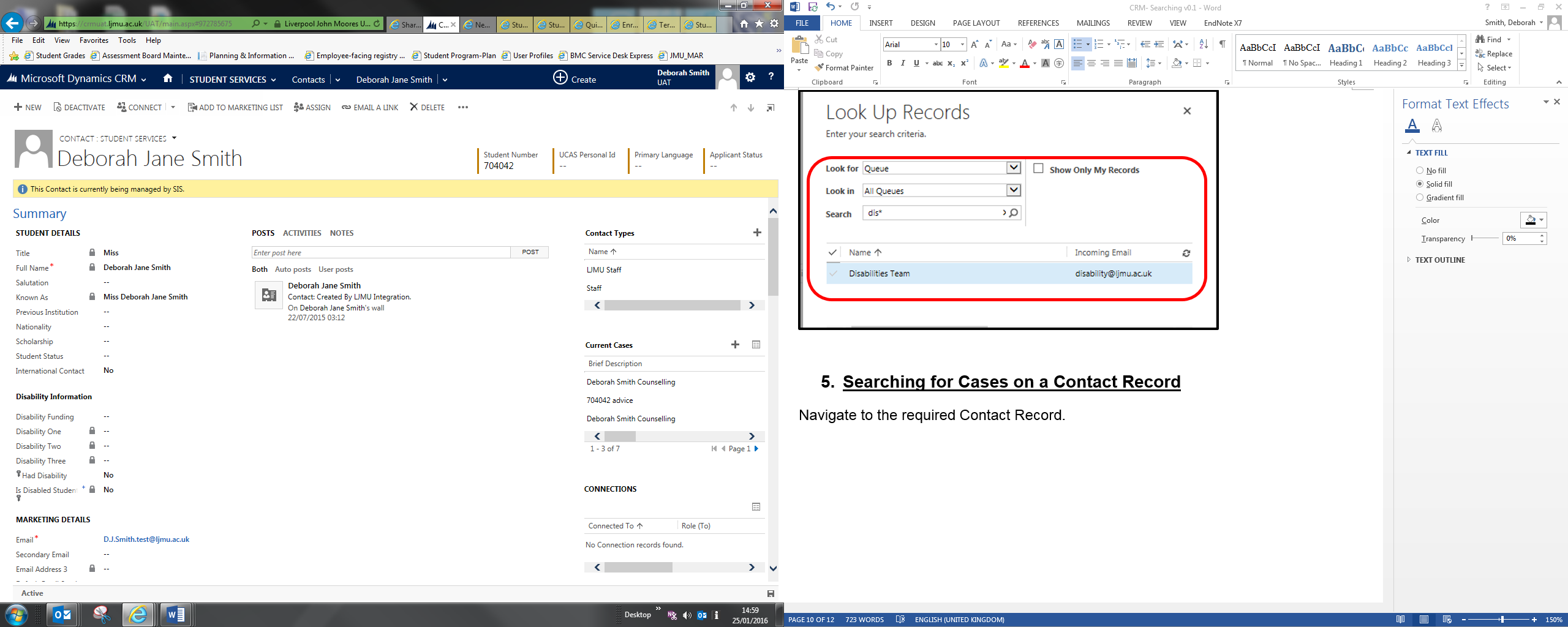


* **You can now search for the student using the search box.**

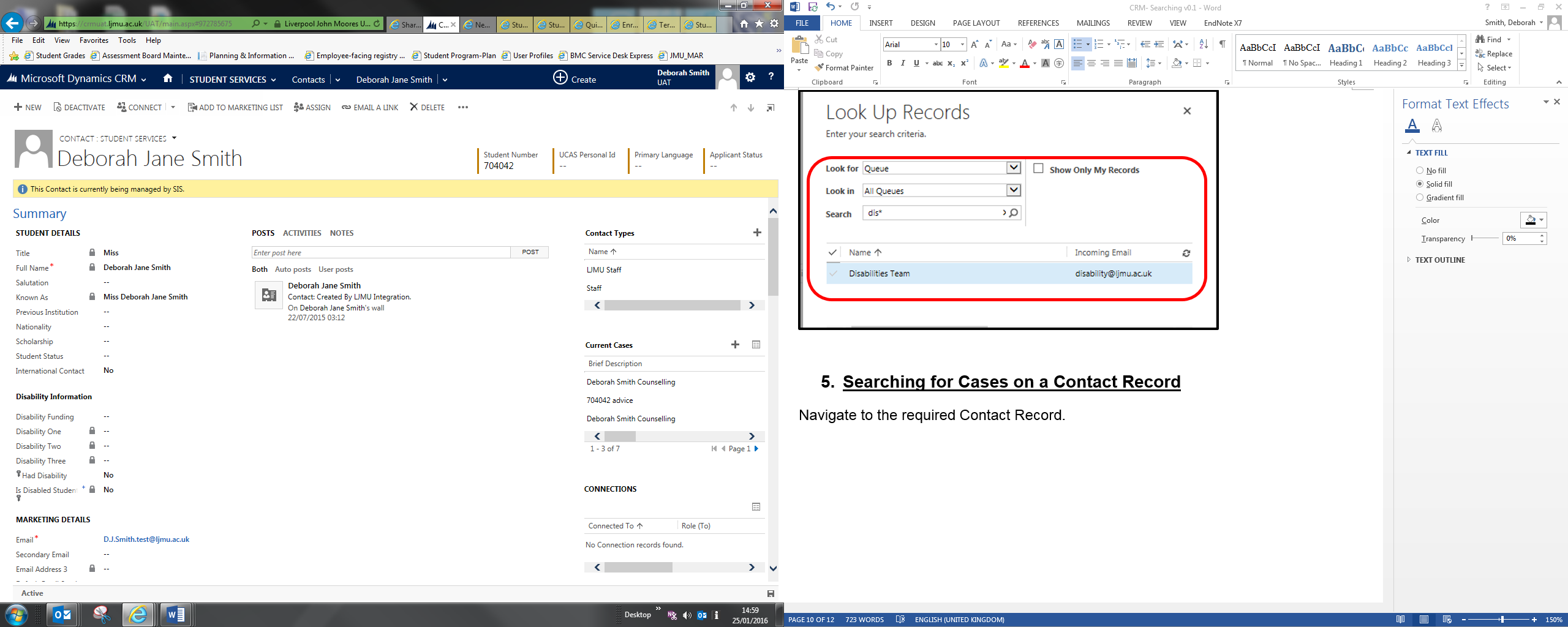


1. **Searching for Cases on a Contact Record**

* Navigate to the required **Contact Record**
* To the right hand side of the screen, you will see a column called **‘Current Cases’**



* Click on the **‘square’** icon to expand the view.



* Once expanded, this screen will display all **Active Cases** related to the Contact.
* Double click on the required case to open it up.

