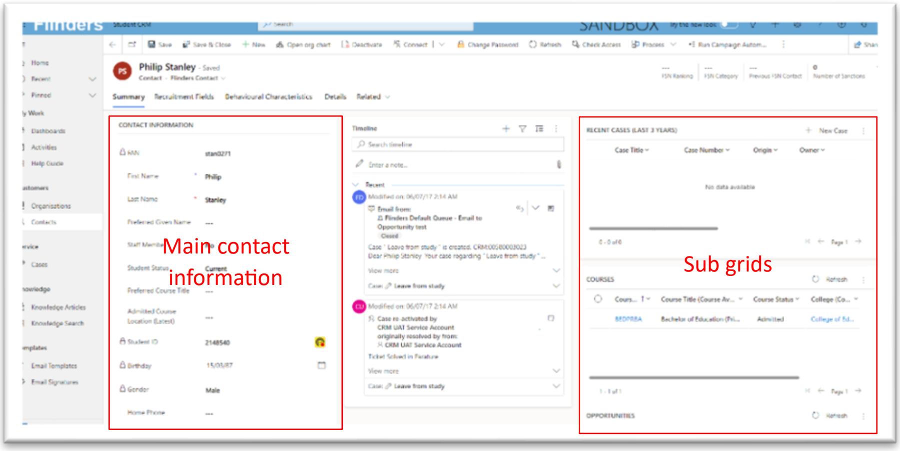
6.0 Managing Contacts

This module covers:

- Contacts (managing)
- Relationships & Sub Grids
- Creating Cases

6.1 Contacts

<u>Contacts screen Navigation</u>



In the Main Contact Information window,

 Padlock icon indicates “**read only**” fields as this data has been set by other systems.

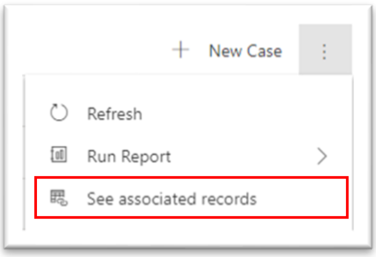
Note: If you come across a Personal Email in the Main Contact information window, which starts with an @symbol, please do not modify this is used by ISA applications.

***Admitted Course Location (Latest)** – This is a new field and data is derived from the Student Management System*

6.2 Relationships & Sub grids

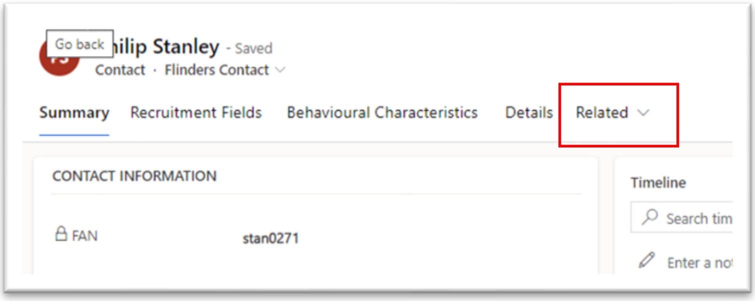
Sub grids are related records. These are related records to what we are looking at.
In each of the sub-grid windows

1. Click on the Ellipsis 
2. Select ‘**See associated records**.’

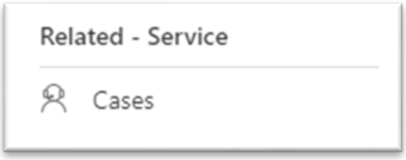


3. This will expand the view to display any records that are associated with the contact.

6.2.1 The Related area



1. Click the Chevron next to **Related**.
2. You'll need to scroll down the list to find **Related – Service**



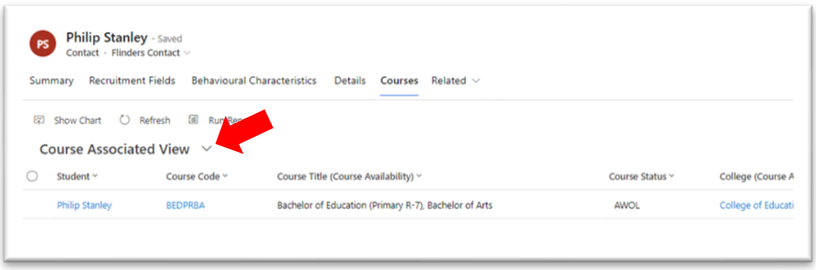
3. Select **Cases**.

Note: there are multiple selections when you click on the Chevron. They relate to the different relationships e.g. Related–common, Related-Sales, etc. and will show different data or results.

6.2.2 Courses

In the Courses sub-grid window

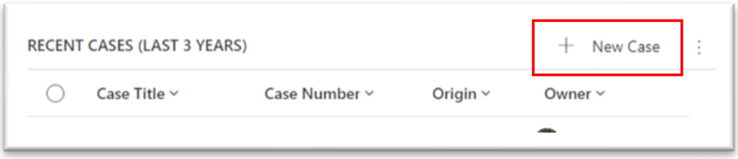
1. Click on the Ellipsis 
2. Select '**See associated records**.'
3. The courses associated with the student will now be displayed.



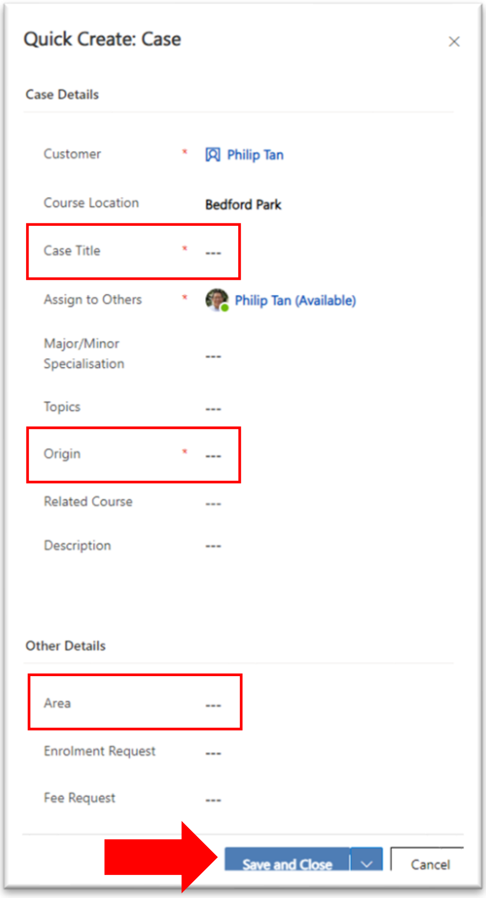
   a. If you have any personal views, you can click on the Chevron to bring them up.

6.2 Creating a Student Case

1. Find the student's contact information in **Contacts.**
2. Double click on the student record
3. In the recent cases Sub grid window, click on **+ New Case**



4. Fill in the details in the quick create form e.g., Case Title, Origin, Area, etc.



5. Click on **Save and Close**.

*Note: When you create a case, by default you will be labelled as the owner. If you need to Assign this case to another team to action, use the **Assign & Comment** feature and before you send it, ensure that you have filled out the **Description** field so that they will have some details as to what the case is all about. Alternatively, you can also add in a **Note**.*