

6.0 Managing Contacts

This module covers:

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

6.1 Contacts

Contacts screen Navigation



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.'

	+ New Case	:
Ö	Refresh	
[0]	Run Report	>
₽	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

Go back	ilip Stanley - Saved atact · Flinders Contact	~		
Summary	Recruitment Fields	Behavioural Characteristics	Details	Related \checkmark
CONTACT	INFORMATION		•	Timeline
₿ FAN	stan0	271		 Search tin Enter a no

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

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.

PS	Philip Stanle Contact · Flinder	ty - Saved rs Contact ∨		
Sumi	mary Recruitmer	nt Fields Behavioural C	Characteristics Details Courses Related \vee	
网	Show Chart 🖒	Refresh 🗐 Run Rep		
深 C(Show Chart 心 ourse Associat	Refresh 🖩 Run Rep		
تھ C ر	Show Chart (신 OURSE ASSOCIAt Student ~	Refresh I Run Res red View ~ Course Code ~	Course Title (Course Availability) ~ Course Status ~	College (Course

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

RECENT	CASES (LAST 3 YEA	ARS)		+ New Case	÷
\bigcirc	Case Title ~	Case Number ~	Origin ~	Owner ~	
				-	

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

Customer	*	🛛 Philip Tan	
Course Location		Bedford Park	
Case Title	*		
Assign to Others	*	Philip Tan (Available)	
Major/Minor Specialisation			
Topics			
Origin	*		
Related Course			
Description			
ther Details			
Area			
Enrolment Request			
Fee Pequest			

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**.