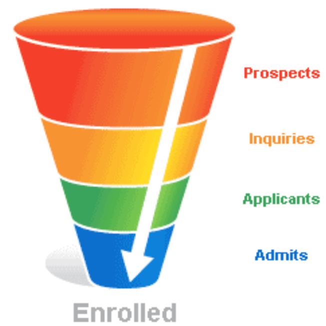
Intelliworks CRM

Quick Start Guide

Introduction



Intelliworks is a CRM: a contact relationship management tool to manage the lifecycle of an initial inquiry through acceptance to a graduate program.

- All of your graduate admissions contacts and their related information are stored in a central location on the secure Intelliworks server. Everyone can know at a glance what has been done with the applicant and what stage it resides.
- You can create and manage marketing events and track applicants from that campaign.
- You can create your own custom view.
- You can run reports.
- Students have a self-service portal.

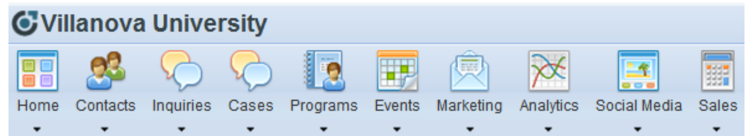
Account/Access

An email will come to you from Intelliworks which provides your login information.

- Note or copy the password.
- Point your browser to **www.intelliworks.com**
- Click the Secure Tab
- Login with your email and password
- Check the box to stay logged in.

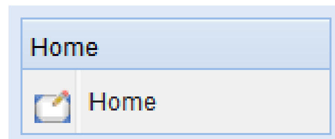
Interface-Top Left

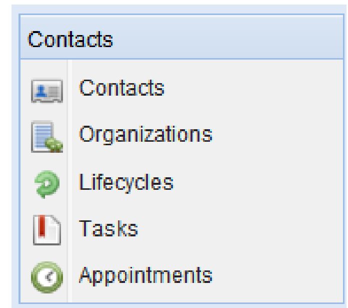
When you log into Intelliworks, the interface is divided into several sections. The top left section contains icons which perform functions in Intelliworks.

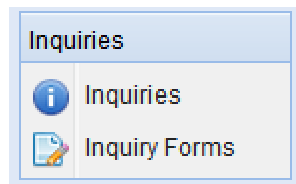


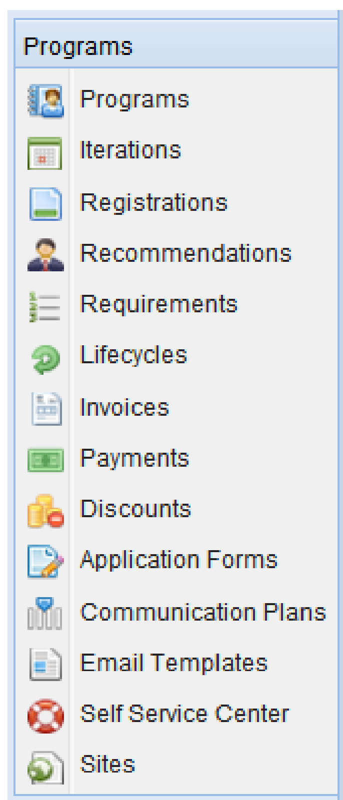
Each icon above has a drop down menu. See each menu below.

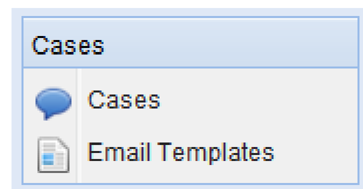
TIP: The site map (top right corner) displays all the available functions from each drop down.





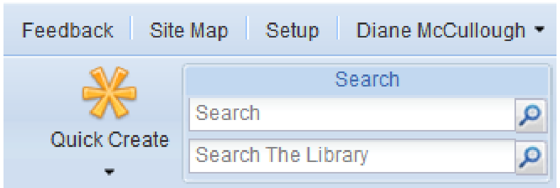






Interface-Top Right

Several options appear at the top right of your screen: Feedback, Site Map, Setup, Your Account Name, Quick Create and Search.



Feedback sends a support ticket directly to Intelliworks. Please contact UNIT if you have a problem/suggestion to report.

Site Map displays the functions of each icon displayed on the left side of the screen.

Setup is for system admins for the most part, except where noted in this guide.

Your name contains access to Help and Sign Out.

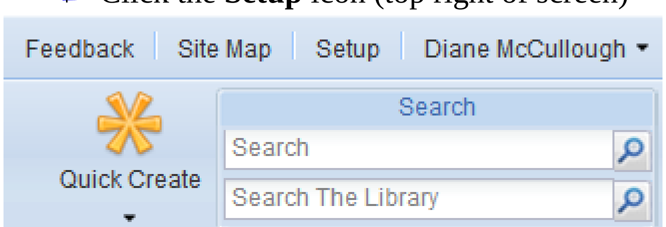
Quick Create is used for faster creation of various Intelliworks functions such as Contacts, Cases, etc.

Search allows you to find contacts, etc.

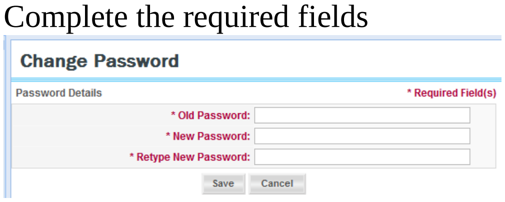
Change Your Password

It is important that you change your password from the one assigned by Intelliworks.

- Click the **Setup** icon (top right of screen)



- Click **Password Settings**
- Click **Change Password**
- Complete the required fields



- Click **Save**
- Click the **Home** icon on the main menu to return to the main welcome screen.

Interface –Navigation Pane

A navigation pane displays on the left side of the screen. It can be minimized or expanded via a click on the << icon.

Each listed group can be minimized or expanded via the +/- key.

Interface-Widgets

When you open IW, you are taken to your Home tab. Widgets (rectangles containing data) appear in the center part of your Home screen; each containing specific information or functionality which can be customized (see later section.)

Views

Each of the main function buttons produces views based on your permissions to see them. You will want to make default views for yourself for your department’s view. For example, clicking Cases/Cases displays a list view.

Pre-Defined Views

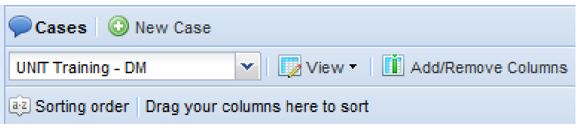
- Click the View icon
- Click Edit
- Click Set as default view:

Now you can also add a widget on your Home page for this view.

Add/Remove Columns

Each of the main functions list view has an icon to Add/Remove columns.

- Click the Add/Remove Columns icon
- Expand/collapse the items
- Drag and drop from the left side to the right.
- Click OK.



Create Your Own View

If you need to create a new view based on your own needs:

- Click the View icon in the module (e.g., Cases, inquiries, etc.)
- Click Create
- Give your view a name with the following naming convention: college name, dept. name, your name
- Click Set as default view (if you desire)
- Add the criteria from the drop down boxes
- Click the + to add another line of searching criteria

Warning: Be careful when creating your criteria and always test it first to make sure the records you want actually appear.

Create a Contact

If you search and don't find the contact, you will need to create one. There are four methods, but the easy/quick way is via the Quick Create button.

- Click the Quick Create icon in the upper right corner
- Select Contact from the drop down list
- Complete the fields
- Click Save

Create a New Case

Cases allow you to view every interaction a student has had with Villanova. A case is created when someone completes an online inquiry from your website; and you can manually create cases for phone or in-person interactions.

- You can open the contact and click Cases at the bottom, New Case or
- Click the Cases icon, click Cases, New Case.
- Enter the values in the fields
- Enter a message as to what transpired between you and the prospective student.
- Click Save

Add a new message to a case

You can document a phone conversation or in person interaction by creating a new message.

- From the case, click New Message
- Select the Type
- Select the Channel
- Type in a message
- Click Save.

This message is added to the case as a thread in the conversation; not a new case.

This will **NOT** email the contact.

Reply and add a new message

Replying to a case will send an email to the contact and add a new message thread.

- From the case, click the Reply icon
- Type in the message
- Select a template if needed
- Customize the message if needed
- Click Send.

An email is sent to the contact and the message is added as a case thread in the conversation.

Comments

Comments are internal notes and are not visible to distributed to the contact. They cannot be produced via a report.

Replying to Inquiries

Online inquiries require immediate attention.

- Click the dropdown arrow associated with the Action button for the prospective student you wish to respond.
- From the list, select @ send email.
- An email window from Intelliworks (not Outlook) appears.
- Complete as any normal email.
- Click Send.

Customizing the Home Tab

After you have customized views from the main icons, you can also have them display on your Home tab for quick reference. This is highly recommended.

Add a widget

The Add Widget icon is on the home page and they provide you with information on a specific view of IW data. There's no limitation for how many widgets you can have; but it can become cluttered.

- Click Add Widget
- Select the function from the Module drop down list
- Select a custom view from the list
- Click Add

Move a widget

Drag and drop widgets to the preferred location on your Home tab.

Expand a widget full width

Click the double arrow icon on any widget to expand it full screen width.

Delete widgets

Click the X to remove the widget.

Logging out of Intelliworks

It is recommended (for security purposes) that you logout of Intelliworks when not using it for long periods of time.

- Click the drop down arrow next to your name
- Click Sign Out

Action Items

Open Firefox and pin it to your Windows Task bar (Right click icon/Pin this program to Taskbar)

Bookmark Intelliworks in Firebox for easy access

Change your password if you didn't in class (Setup/Personal Settings)

Create an email signature (Setup/Personal Settings)

Update your account information (Setup/Personal Settings)

Customize Home tab widgets and other Views

Notes