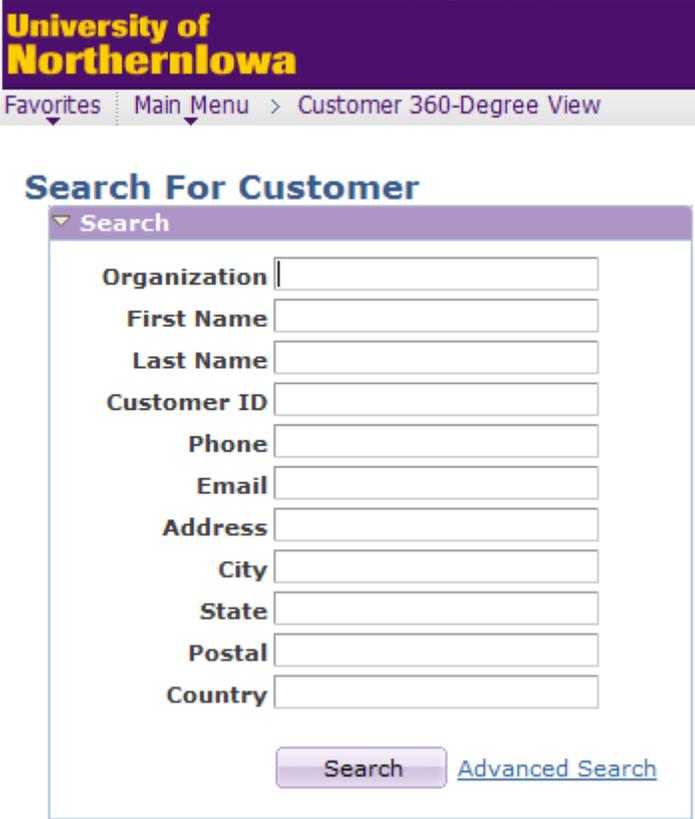
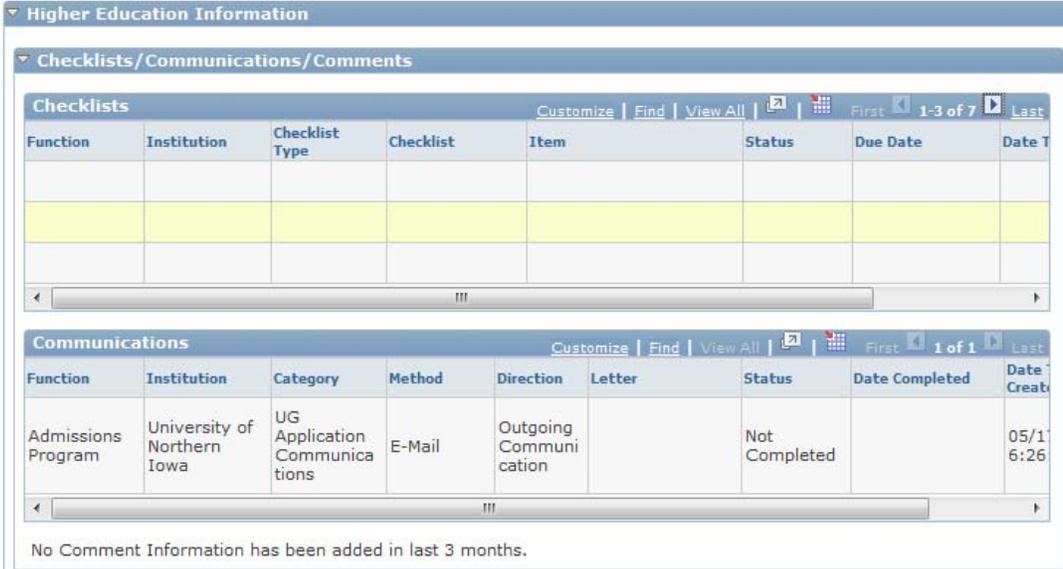


CRM Viewing Checklists, Communications, Comments

Purpose: Applicants should be directed to log into My Universe to view outstanding checklist items. The 360-Degree View shows the Checklists, Communications, and Comments (Three Cs) for an applicant or prospect. To view the applicant’s Three C’s follow the steps below.

Step	Action
1.	<p>In CRM, navigate to the 360-Degree View. Select Main Menu > Customers 360-Degree View</p> <p>Result: The Search For Customer page displays.</p> 
2.	<p>Enter applicable search criteria. Click the Search button.</p> <p>Result: The 360-Degree View for the matching record displays. Note: If multiple records match the search criteria, all matches will display. Click the appropriate result.</p>

Step	Action																		
3.	<p>Scroll down to the Higher Education Information section to view the Checklists/Communications/Comments.</p>  <p>The screenshot displays the 'Higher Education Information' section. Underneath, there are two sub-sections: 'Checklists' and 'Communications'. The 'Checklists' table is currently empty. The 'Communications' table contains one entry:</p> <table border="1"> <thead> <tr> <th>Function</th> <th>Institution</th> <th>Category</th> <th>Method</th> <th>Direction</th> <th>Letter</th> <th>Status</th> <th>Date Completed</th> <th>Date Created</th> </tr> </thead> <tbody> <tr> <td>Admissions Program</td> <td>University of Northern Iowa</td> <td>UG Application Communications</td> <td>E-Mail</td> <td>Outgoing</td> <td>Communication</td> <td>Not Completed</td> <td></td> <td>05/16:26</td> </tr> </tbody> </table> <p>Below the 'Communications' table, a message states: "No Comment Information has been added in last 3 months."</p> <p>Tips:</p> <ul style="list-style-type: none"> • Select View All in the title bar for each of the Three Cs that have multiple entries to see all the entries. • Click the <i>column header</i> to sort by any column. 	Function	Institution	Category	Method	Direction	Letter	Status	Date Completed	Date Created	Admissions Program	University of Northern Iowa	UG Application Communications	E-Mail	Outgoing	Communication	Not Completed		05/16:26
Function	Institution	Category	Method	Direction	Letter	Status	Date Completed	Date Created											
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