LRM Knowledge Base

Link to access LRM: https://lrm.wsb.wisc.edu/WSBLRM

To quickly find an article, enter search terms in the field below.

LRM Support: Contact Information Technology Solutions (ITS) at support.wsb.wisc.edu.

What's new in LRM

Blog Posts

Blog: LRM - New Functionality: Search by Phone Number created by Dean McInerney  WSB Knowledge Base  Jul 20, 2018

Blog: LRM - New functionality: Track boards and board members created by Dean McInerney  WSB Knowledge Base  Nov 16, 2017

Blog: LRM - New activities panel created by Dean McInerney  WSB Knowledge Base  Nov 16, 2017

Jump to:

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Outlook Connector
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General CRM User Documentation

New User Setup
First Time User Setup - Browser and LRM Options
Essential LRM Navigation
Basic Contact Search in LRM
Allow Users to Send Email on Your Behalf
Dynamics 365 Customer Engagement

Prospective Student (Lead) Management

Prospective Student View Form - Explains the information presented on the form.
Prospective Student (Lead) Sub Roles - Understand the sub role of the prospective student.
Lead Status Definitions - Understand the status of the prospective student.

Lead Management - Understand the distinction between Lead Status Not Validated, Validated and Inactive.

Constituent Roles - Descriptions of constituent roles within LRM and activities that require the constituent role

BBA Lead Management - Explains the BBA Lead Interest Management structure and additional attributes.

Create a New Prospective Student Lead Record - Create a new person record for a prospective student.

View Active Leads with One Interest in my Program or Plan - Find your program’s prospective students.

Update Prospective Student Interests - Update program interests on a prospective student.

Add an Activity to a Person Record - How to track phone calls and meetings with prospective students.

Lead Prioritization: Engagement and Qualification Metrics - How to qualify prospective students.

Prospective Student Nurture Program - Details regarding the automated prospective student email nurture program set up in LRM.

Sending Microsoft Dynamics Email Templates - Sending emails from the built in Dynamics email templates.

Prospective Student Data Import

Import Prospective Student Lists - How to import prospect lists with a program interest.

Prospective Student Data Import Campaign - Create a prospective student data import campaign.

Prospective Student Documents

Secure Document Storage, Upload Pre-Applicant Documents - Attach a secure document file to the prospective student record.

Prospective Student Events

Prospective Student Event Campaign Management - Create a prospective student event registration form using LRM.

Send Dynamic Event Email - Process to Update Event Temporary Fields.

Send Event Registration Confirmation Email - Adjust the process that sends the automatic event confirmation email

Sending a Bulk Email from LRM - How to take an email that was created in the Sitecore Email Builder and send out as a bulk email using the LRM system.

How to respond to WSB Inquiries - How to access and respond to inquiries submitted by the Request for Information form.

Prospective Student Data Reports

Leads Tabular View - View data on your prospective student pool.

Duplicate Detection

Duplicate Record

Duplicate Detection Prompt - What to do when receiving the duplicate detection prompt.

Set Up Duplicate Detection Job - How to set up a duplicate detection job.

Admissions Application Management

WSB Application Testing Process - How to test and validate applications to your program

Access to Admissions Applications - How to view applications to your program or plan.

Application Stages and Statuses - Understand the different application stages.

Application Ready to Review - How to make an application ready to review.

Decision Management Guide - How to make or change admissions decisions on application records.

Admissions Review - How to complete LRM admissions review form.
Decision Letters - How to create decision letters.
Publish Decision - How to publish an admissions decision and decision letters.
Build Admission Letters (AL) - How to set up admission letters for new programs or scholarships
Returning Applicants - Understand what information is carried over to a subsequent application.
Deferred Applicants - How to update the application status for a deferred applicant.
Post Submission Application Adjustment Quick Reference - How to add or edit information after an application has been submitted.
Moving the Status Back in the Application Process Workflow - How to use the Application Workflow Process to move an application back a stage.
In-Progress Applicant No Longer Interested - Steps to withdrawing an application within LRM.
Admit Pending Quick Reference Guide - How to use the Admit Pending conditions area of the application record.
Applicant Campus ID in LRM - Details of how the applicant's Campus ID is populated into LRM.
Application Fee Waiver - How to add an application fee waiver to a person record.
Electronic Recommendation Records - How to view, update, and edit recommender profiles, as well resend the unique recommender electronic forms.
Documents Fail to Upload to Mashup - How to fix documents which fail to upload into the mashup.

Applicant Data Reports
Application Analysis - View key data points by program

Application Settings
Application Configuration - How to update application instruction sections within the Admin Settings of LRM.
Add, Update, or Remove Recommendation Questions - How to change the questions which appear to a recommender.

Corporate and External Relations
Life-Long Relationship Management (LRM) for Corporate External Relations (CER) Talking Points
LRM for Career Services & External Relations (LRM-CER)
Glossary of External Relations Terms
Primary Engagement Activities for Recruit and Hire
Secondary Engagement Activities for Recruit and Hire
Account View Form
Person View Form
Record a Company's Standard Activities
Add an Activity to a Person Record
Record a Company's Engagement Activities
Add an Advisory Board
Add an Advisory Board Member
Add an Alumnus/Alumna

Outlook Connector
The Outlook Connector is only being rolled out to specific users. Please submit a support request if you are interested in using the Connector.

Adding Activities Through Outlook - How to add activities through Outlook with the Connector.

Creating Contact for Email Sent to Contact Not in LRM - How to create a contact record in LRM for an email sent through Outlook to a contact not already in the system.

Outlook Dynamics Tab - An overview of the Dynamics tab within Outlook.

Tracking Emails Using the Outlook Connector - How to track an email sent from Outlook into LRM.

Using LRM within Outlook - The different LRM functionalities available in Outlook with the Connector installed.

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Miscellaneous

ClickDimensions/LRM Email Marketing Support - Support references for ClickDimensions email provider.

Data Import Interest Expire Workflow - How imported leads and lead interests are managed in the LRM system.

Dynamics 2016 Basic Functionality Differences - Describes core changes in navigation and layout.

Export Fails to Generate Excel File/Spreadsheet - How to fix an error when trying to export a view to a spreadsheet.

Integration with Central Campus Student Database - How LRM integrates with UW-Madison Central Student Database (SIS).

SIS Data Load - How to confirm information between an application and SIS, as well as resolve any suspend or error load records.

SIS Matriculation Date - Deadlines around admissions decisions entered in SIS.

Campaign Automation for FT MBA Admit Email Series

Campaign Automation for Leads Management

Quick Add Walkthrough

Reactivate a CRM Deactivated Contact

Residency Application Process

Reviewer Reference Guide

States and Regions

Unblock an Email from ClickDimensions - How to unblock someone if ClickDimensions has blocked their email address due to marking an email as spam.

Unsubscribe Management

Update Marketing List for Event Email Sends

Duplicate recommendation questions - How to deactivate invalid recommendation question responses

Manage invalid recipients

Applicant "log in" error due to application dashboard display issue