LRM Knowledge Base

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

NOTE: the URL above will work for all operating systems, including Mac

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:

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.

Reactivate a CRM Deactivated Contact - How to reactivate after the inactive lead approaches WSB.

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.

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

Contact Entity Record Analysis - How to check entity record field Data

States and Regions

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.

Post-Submission Application Adjustment Quick Reference - How to add or edit information after an application has been submitted.

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

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 as resend the unique recommender electronic forms.

Documents Fail to Upload to Mashup - How to fix documents that fail to upload into the mashup.

Admissions Review - How to complete the LRM admissions review form.

Reviewer Reference Guide - A summary of the LRM application review section.

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

Build Admission Letters (AL) - How to set up admission letters for new programs or scholarships

Decision Letters - How to create decision letters.

BBA Admission Letter with Scholarships: How to incorporate BBA Scholarships into the BBA Admission Letters

Publish Decision - How to publish an admissions decision and decision letters.

Returning Applicants - Understand what information is carried over to a subsequent application.

Deferred Applicants - How to update the application status for a deferred applicant.

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.

Quick Add Walkthrough - How to manually create an application on behalf of an applicant

Admit Pending Quick Reference Guide - How to use the Admit Pending conditions area of the application record.

BEL Program Eligibility

BEL High School Counselors

Admissions Application Support

Creating an Admissions Test Account

Finalizing Applications

Finding Authorizers

Finding Recommenders

How to change "Inactive" application status backward

Student Application Re-entry Process

Quick Add Walkthrough (i.e. Consortium Application)

Troubleshooting Recommendation Problems

Duplicate recommendation questions - How to deactivate invalid recommendation question responses

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

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.

Application Pages - How to configure different application pages based on the program's needs

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.

System Integrations

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.

Residency Application Process

General CRM Features

How to utilize the advanced find query tool in LRM

Share Advanced Find Queries, Dashboards, and Graphs/Charts

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

ClickDimension In WSB LRM

Campaign Automation for FTMBA Admit Email Series

Campaign Automation for Leads Management

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

Manage "Invalid recipients" identified by Click Dimension

Unsubscribe Management

Update Marketing List for Event Email Sends

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

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

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.