# Image result for liverpool john moores university logo

# Process Document:

**CRM – Student Advice & Wellbeing**

Liverpool John Moores University

**CRM Activities: Adding Connections**

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**Adding Connections to Existing Contacts in CRM**

Connections can be recorded between contacts on CRM to illustrate that there is an existing relationship. This could be a parent of a student or prospective student contacting the service or someone in a professional capacity such as a tutor or medical personnel.

1. To add a **connection**, first ensure that you are in a **contact** record. You may have to create the contact record first based on the method by which they have contacted you. In this example, a parent has phoned the service.



1. Navigate to the **Connections** region of the **contact** record. Any existing connections will also appear here and can be filtered/sorted by clicking on the column heads.



1. To record a new connection click on the **associated records** view.



1. The **Active Connection Associated View** will open. Click .
2. The **New Connection view** will display to enable you to search for and select the existing contact that you want to connect to. Click the **Maginifer icon** next to the **Name** field.



1. Scroll to the bottom of the list and click on **Look Up More Records** to generate the search view.



1. In the **Search** field enter the details of the contact name you want to search for using the **\* wildcard** to return the most possible matches, displayed as a list. (You can scroll right to view further data fields to verify your selection) and click **Add.**



1. Once added, repeat the process to select the best descriptor for the relationship between the two contacts by clicking on the **role** magnifier (this is bi-directional and will pre-populate the connecting record). Relationships can also be effective dated as per the below. Note that you will default as the owner.



1. Click the **Save & Close** icon to save the relatinship details and go back to the original contact screen.