# [Image result for liverpool john moores university logo](https://www.google.co.uk/url?sa=i&rct=j&q=&esrc=s&source=images&cd=&cad=rja&uact=8&ved=0ahUKEwjZuerSu4nXAhWGchQKHbT9CwIQjRwIBw&url=https://www.eventbrite.co.uk/o/liverpool-john-moores-university-roscoe-lectures-3233158788&psig=AOvVaw2rEDE_dQz3fMXV7J1A9n9g&ust=1508941556822069)

# Process Document:

**CRM – Student Advice & Wellbeing**

Liverpool John Moores University

**CRM Activities: Adding Connections**

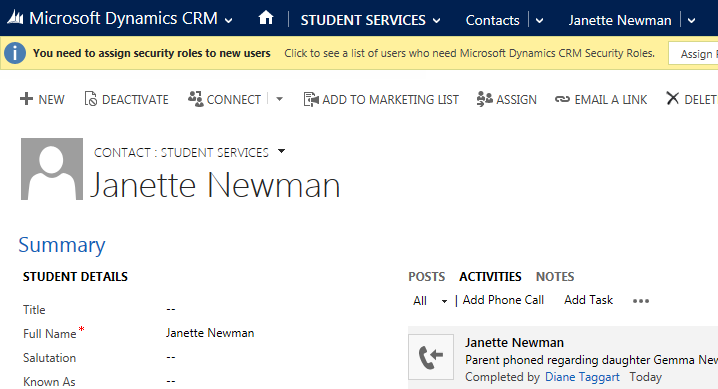
Version 0.2, November 2018

Author: DT Business Support Team

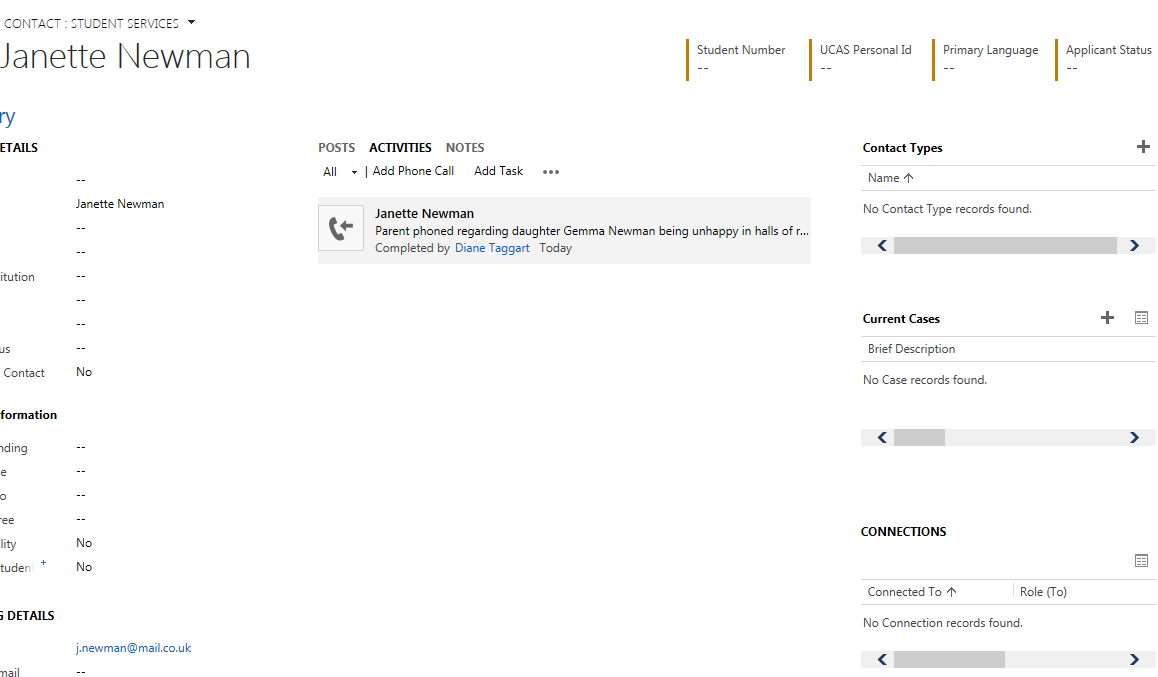
**Adding Connections to Existing Contacts in CRM**

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.

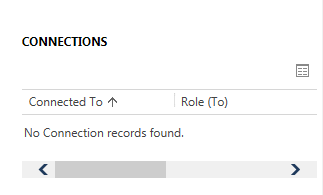
1. To add a **connection**, first ensure that you are in a **contact** record. You may have to create the contact record first based on the method by which they have contacted you. In this example, a parent has phoned the service.



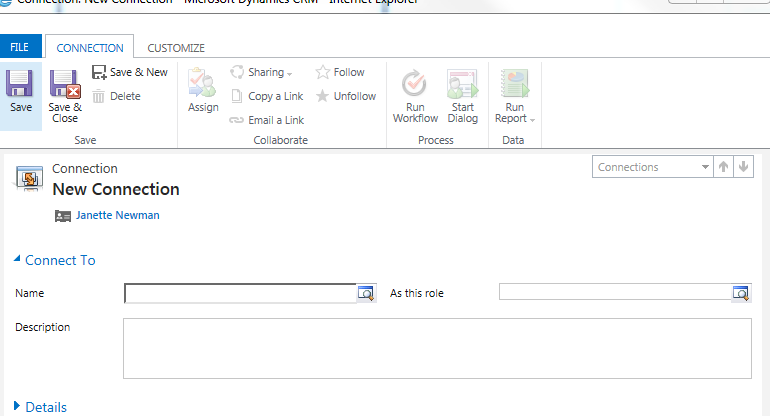
1. Navigate to the **Connections** region of the **contact** record. Any existing connections will also appear here and can be filtered/sorted by clicking on the column heads.



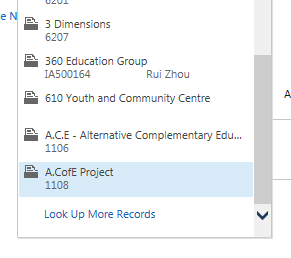
1. To record a new connection click on the **associated records** view.



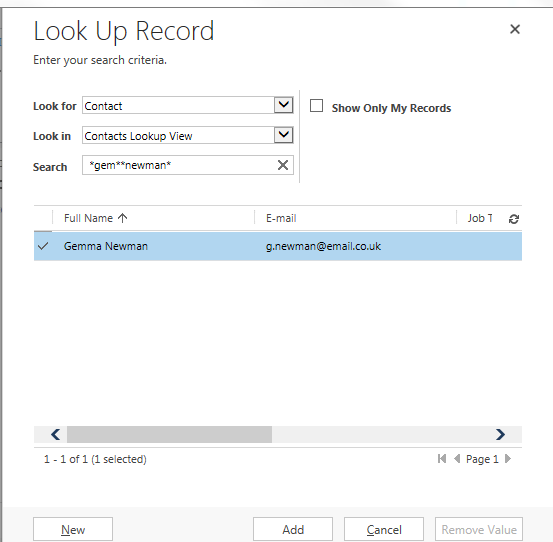
1. The **Active Connection Associated View** will open. Click .
2. The **New Connection view** will display to enable you to search for and select the existing contact that you want to connect to. Click the **Maginifer icon** next to the **Name** field.



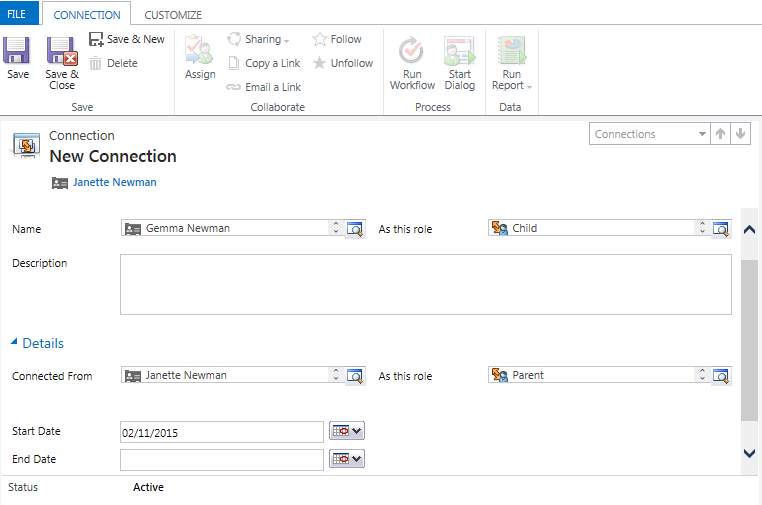
1. Scroll to the bottom of the list and click on **Look Up More Records** to generate the search view.



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.