Purpose Statement

Quick Reference Guide (QRG)

This Quick Reference Guide (QRG) booklet will provide you with quick, accessible information to perform specific tasks or business processes within UQ Engage. Each guide will be a one- or two-page instruction sheet, identifying what is important for you to know to move forward with your job.

QRGs within this document are categorised by the objects you will find in the UQ Engage system.
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If you have questions, contact:  
E: UQEngageCRM@uq.edu.au
Enquiry Management
Creating an Enquiry Case

**Purpose:** Prospective student enquiries are created in UQ Engage through multiple ways, including email, phone and walk-ins. Email and webform enquiries are routed through a triage process, depositing the record in the enquiries queue. Follow these steps to learn how to create an enquiry case in UQ Engage manually.

1. Click on the Global Action button and select Create Enquiry Case

   ![Create Enquiry Case](image)

2. Enter the enquiry details then click Next

<table>
<thead>
<tr>
<th>Case Details</th>
<th>Contact Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Subject</em></td>
<td>Salutation</td>
</tr>
<tr>
<td>Description</td>
<td><em>FirstName</em></td>
</tr>
<tr>
<td>Case Type</td>
<td><em>MiddleName</em></td>
</tr>
<tr>
<td>Topic</td>
<td><em>LastName</em></td>
</tr>
<tr>
<td><em>None</em></td>
<td>Email</td>
</tr>
<tr>
<td>Priority</td>
<td><em>Email</em></td>
</tr>
<tr>
<td>Medium</td>
<td><em>Mobile Phone</em></td>
</tr>
<tr>
<td><em>Person Type</em></td>
<td><em>Home Phone</em></td>
</tr>
<tr>
<td><em>None</em></td>
<td><em>Subject</em></td>
</tr>
</tbody>
</table>

   - **Subject** – Enter the subject of the case enquiry
   - **Description** – Add a description of the enquiry
   - **Case Type** – Choose the type of enquiry case you wish to create.
   - **Topic** – Choosing a topic may reveal a sub-topic field. Topics and subtopics are related.
   - **Priority** – by default the priority will be set to medium
   - **Person Type** – Choose the person making the enquiry.

If you have questions, contact:

E: UQEngageCRM@uq.edu.au
Create Enquiry Case

Case successfully created

Case Number: 00650954

3. The enquiry case record is created and assigned a case number. Click Finish.
Updating an Enquiry Case

**Purpose:** You may need to update an enquiry case if, say, you are triaging a list view and need to add additional fields. Follow these steps to learn how to edit and update an Enquiry Case.

1. Once you are in the Cases tab and have opened the enquiry case you wish to edit, click the Edit button.

2. The enquiry case will open for editing. Make your changes then click Save.

**Important!** If you are in the FSCC team and are triaging your list view ‘Open Enquiries – Prospective Intl’, you will need to edit enquiry cases for the Study Abroad and Exchange team by updating the enquiry case to ensure the ‘short-term study type’ field is filled in to say whether the enquiry is for study abroad or incoming exchange. Once you save the changes, the enquiry will appear in the Study Abroad and Exchange team’s list view for action.

Likewise, if international enquiries come through the ‘Open Enquiries – Prospective Intl’ list view, the FSCC team will update the enquiry case adding by in the ‘region’ field. This will ensure the enquiry will display in the relevant region list view.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
Resolving an Enquiry Case

**Purpose:** Once an enquiry case has been addressed, you will need to resolve it. Follow the steps below to learn how to do this.

1. In the open enquiry click the Edit button

2. Change the Status filed to Resolved, then Save your changes
Changing an Enquiry Case Owner or Queue

**Purpose:** The Change Owner functionality for Cases is multipurpose. It allows you to assign an enquiry case to another user or a queue. Follow these steps to learn how to change an enquiry case owner or queue.

1. In the Cases tab, click on the arrow corresponding to the enquiry case you wish to change the owner to and click Change Owner.

2. You can choose to change the case to another user or a different queue.
3. Choose Users to search for another user to assign to. Search for their name and select them. Select the tick box if you want to send them an email notification to their UQ email. Click Submit.

4. Choose Queues to search for another queue to assign to. Search for the queue name and select it. Click Submit.

Handy Tip! Enquiry cases that are added to the Suspected Spam Queue will remain either in the queue or be reassigned into a different queue. Only users with the correct permissions will have the authority to access records in the Suspected Spam Queue. Check out the table below for a list of the oracle queues your team has access to.
<table>
<thead>
<tr>
<th>Oracle Queue Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASD – Student Centre</td>
</tr>
<tr>
<td>BEL - Business General</td>
</tr>
<tr>
<td>BEL - Economics General</td>
</tr>
<tr>
<td>BEL - General</td>
</tr>
<tr>
<td>BEL - Law General Enquiries</td>
</tr>
<tr>
<td>EAIT - Architecture General</td>
</tr>
<tr>
<td>EAIT - Chemical Engineering General</td>
</tr>
<tr>
<td>EAIT - Civil Eng General</td>
</tr>
<tr>
<td>EAIT - ITEE Student Enquiries</td>
</tr>
<tr>
<td>Graduate School – Assign all enquiries</td>
</tr>
<tr>
<td>HABS - Dentistry General</td>
</tr>
<tr>
<td>HABS - General</td>
</tr>
<tr>
<td>HABS - HMNS General</td>
</tr>
<tr>
<td>HABS - NMSW General</td>
</tr>
<tr>
<td>HABS - Pharmacy General</td>
</tr>
<tr>
<td>HABS - SHRS General</td>
</tr>
<tr>
<td>HASS - Communication &amp; Arts General</td>
</tr>
<tr>
<td>HASS - Education General</td>
</tr>
<tr>
<td>HASS - General</td>
</tr>
<tr>
<td>HASS - HAPI General</td>
</tr>
<tr>
<td>HASS - Languages &amp; Cultures General</td>
</tr>
<tr>
<td>HASS - Music General</td>
</tr>
<tr>
<td>HASS - POLSIS General</td>
</tr>
<tr>
<td>HASS - Social Science General</td>
</tr>
<tr>
<td>ITS - Service Desk</td>
</tr>
<tr>
<td>MED - Medicine</td>
</tr>
<tr>
<td>Science - BIOL General</td>
</tr>
<tr>
<td>Science - CAI</td>
</tr>
</tbody>
</table>

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
### Oracle Queue Label

<table>
<thead>
<tr>
<th>Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>Science - General</td>
</tr>
<tr>
<td>Science - SAFS General</td>
</tr>
<tr>
<td>Science - SCMB General</td>
</tr>
<tr>
<td>Science - SEES General</td>
</tr>
<tr>
<td>Science - SMP General</td>
</tr>
<tr>
<td>Science - VET General</td>
</tr>
<tr>
<td>Student Services</td>
</tr>
<tr>
<td>IAS - Enquiries</td>
</tr>
<tr>
<td>ASD – Admissions</td>
</tr>
<tr>
<td>Medicine - Student Administration</td>
</tr>
<tr>
<td>HABS - Psychology Postgraduate</td>
</tr>
<tr>
<td>UQSEC - Internships &amp; Global Experiences</td>
</tr>
<tr>
<td>BEL - Business MBA</td>
</tr>
<tr>
<td>Science - CAI</td>
</tr>
<tr>
<td>Medicine - SBMS</td>
</tr>
<tr>
<td>MED - School of Public Health</td>
</tr>
</tbody>
</table>

**Handy Tip!** You may see a queue called ‘Oracle – Other’. If you attempt to assign to this queue, you will receive an error as it is a system-only queue.
Converting an Enquiry Case into a Prospective Lead Case

**Purpose:** Prospective Lead Cases can be created from event registrations, lead webform enquiries, Facebook submissions and enquiry cases.

To meet the criteria to create an opportunity, the enquiry case must contain the following information:

- A contact associated with the enquiry case
- A study level that is Undergraduate or Postgraduate Coursework
- A person type that is Domestic or International Student
- The enquiry hasn't created a lead case

This QRG will focus on creating a prospective lead case from an enquiry case.

1. When the enquiry case contains the correct criteria (study level and person type), a button will appear ‘Create Prospective Student Lead’. Click this button.

2. A pop-up box will display confirming the conversion. Click Finish to complete the process.
3. You will see the recent activity and the related enquiry case on the Enquiry screen. In this enquiry case, we have created a new opportunity; however, if an opportunity already exists for the contact, the existing opportunity will be updated instead of creating a new one. To go to the Lead Case, click on the case number.

4. Another way you can see the opportunity and related case is from the Contact Record. Once here, you can locate the linked opportunity.
Linking an Enquiry to a Contact

**Purpose:** There may be some times when an enquiry may not have a contact linked to it. You may have received an email enquiry that did not uniquely match a contact within the system, so UQ Engage cannot pull up the correct contact record. Follow the steps to link your enquiry case to a contact record.

1. On the Cases enquiry page, you will see the contact name is missing from the enquiry record.
2. Open the record by clicking on the case number link.
3. Here, the Find/Create Contact details section only mentions that the email received came from a generic email. The rest of the fields remain blank.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
4. Enter the contact details or search for an existing contact with the system, then click Next. This will list all possible contact matches, allowing you to choose the correct one. The contact details will be saved to the enquiry case.
Adding a Comment to an Enquiry Case

**Purpose:** To keep UQ users up to date with the actions occurring on an enquiry case, you can add comments.

Follow these steps to learn how to add comments to enquiry cases.

1. When on an enquiry case record, click Add Comment

2. Add your comment and click Save

3. Your comment will appear in the Activity Posts. It will also appear in the Case Comments section of the enquiry case record.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
Creating a Callback Request

**Purpose:** Follow these steps to learn how to create a callback request for a contact. The callback is automatically logged against the record and the related contact.

1. Locate the enquiry case the callback will relate to. This will ensure the callback is linked to the enquiry case. Select the Create Callback Request tab.

2. Choose the Preferred Callback Day and Time and Select a Topic and Sub Topic. The Sub Topics will default according to the Topic you choose.

3. Add a Description, then click Save

4. Once created, the Callback request will automatically be logged in the Chatter feed for a clear communication trail. Use the drop-down options to like on Chatter or Bookmark to revisit at a later stage. It will also show in your My Recent Activity associated to the Enquiry case. This will allow the Callback request to show for anyone taking ownership of the enquiry case.

If you have questions, contact:

E: UQEngageCRM@uq.edu.au
Following an Enquiry Case

**Purpose:** You can follow records to see updates in your feed, including field changes, posts, tasks, and comments. Follow the steps below to learn how to do this.

1. If you are in an enquiry case or record you would like to remain in the loop on, simply click the Follow button to follow any changes that may occur.

2. The button will change to say ‘following’. When you follow a record, you will see updates to the record in your feed. You can follow up to a maximum combined total of 500 people, topics and records. A handy list is available from your profile to see how many items you may be following.

3. If you wish to unfollow a record, simply click the same button again, deselecting your interest in it.

If you have questions, contact:

**E:** UQEngageCRM@uq.edu.au
Sending an Email (Including Email Templates)

**Purpose:** Emails can be sent directly from an enquiry case record or other records such as contacts, opportunities and lead cases. Follow these steps to send an email from a template to a contact. The email is automatically logged against the record and to the related contact.

### Send an email from an enquiry case

1. Locate the enquiry case the email will relate to. This will ensure the email is linked to the enquiry case and not the contact. Select the email tab.

2. The From and Bcc fields will auto-populate with your details, while the To field will auto-populate with the contact's email address. The Subject will automatically populate with the enquiry case subject by default but is editable.

**Important!** These steps are to be followed only when an email is being sent to an enquirer or a subject matter expert for the first time. All subsequent communications should be sent using the reply/reply all function available next to the email in the activity feed.

**Handy Tip!** The FSCC Conversions team will want to update the ‘From’ field to offerassist@connect.uq.edu.au, with the remaining teams needing to update the ‘From’ field to enquire@connect.uq.edu.au.
Send an email from a contact record, opportunity, or lead case

1. When creating an email from a contact record, opportunity or lead case, the screen will display differently from an enquiry case with the email tab residing under the Activity tab.

2. Click in the text box to activate the email functionality. The From and Bcc fields will auto-populate with your details, while the To field will auto-populate with the contact’s email address. Update the From field as needed. Enter a subject for your email.

   **Handy Tip!** The FSCC Conversions team will want to update the ‘From’ field to offerassist@connect.uq.edu.au, with the remaining teams needing to update the ‘From’ field to enquire@connect.uq.edu.au.

You will see the following icons at the bottom of both email functions. In order from left to right, these are:

1. Attach file
2. Insert merge field
3. Insert, create, or update the template
4. Preview email
5. Clear email or revert
6. Pop-out to docked view

3. As part of Enquiry Management, you will use UQ customised email templates. To use a template, click the Template icon and select Insert a Template.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
4. Select the templates ‘All Lightning Templates’.

You will have access to the following templates:

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Assignment via Email</td>
<td>An email to a subject matter expert (SME)</td>
</tr>
<tr>
<td>Enquiry Confirmation Email</td>
<td>An email confirming the receipt of an enquiry. This email is addressed to recipients who have supplied their names.</td>
</tr>
<tr>
<td>Enquiry Confirmation Email_Callback Request</td>
<td>An email confirming the booking of an advisory session and a call back</td>
</tr>
<tr>
<td>Enquiry Confirmation Email_No Name</td>
<td>An email confirming the receipt of an enquiry. This email is generic with no names.</td>
</tr>
<tr>
<td>Generic UQ Email Template</td>
<td>A blank template with UQ branding</td>
</tr>
</tbody>
</table>

5. Select the required template and click Insert

**Handy Tip!** If you would like to reply to someone’s enquiry and keep their history of the email and the UQ branding, choose the Generic UQ Email Template to retain the history.
6. In the template you will see curly brackets {{{ }}]} and square brackets [. Curly brackets indicate fields that UQ Engage will automatically populate. Square brackets indicate a field that needs to be entered as described in the description.

7. In this example you would need to enter the recipient’s First Name in the salutation field.

8. Scroll through the template filling in any fields as required. You may also see an open field to add additional information.

9. Preview the email before clicking Send.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au

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10. The email will be logged in the Activity feed and linked to the contact record. You can reply and forward an email all from the activity feed.
Creating a New Task

**Purpose:** Follow these steps to learn to create a new task in UQ Engage

1. Locate the enquiry case to the new task related. This will ensure the new task is linked to the enquiry case. Select the New Task tab.

2. Enter the Subject for the task
3. Set a Due Date and link to the appropriate contact from the Name field. Update the Status, then click Save.

The task will display in the relevant chatter feed and is searchable through the Tasks navigation tab.
Receiving a Call in UQ Engage

Purpose: Follow these steps to learn how to receive a call from a contact through UQ Engage.

1. To receive inbound calls through UQ Engage, you must be logged in to Amazon Connect with your status set to Available.

   Handy Tip! You can still receive calls when your Amazon Connect is minimised in the utility bar.

2. The Amazon Connect interface will pop up with an incoming call alert. Click Accept call to answer.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
3. Once you accept the call and the call is connected, you will see additional options Hold, Mute and End Call. You will also see potential contact records and enquiry cases to which the call might be related.

4. Identify the correct contact record from the results list and open it by clicking on the linked Preferred Name field.

**Handy Tip!** If the call is related to an existing enquiry you won’t need to create a new enquiry but navigate to the existing one. If there is no existing enquiry, you will need to create an enquiry case before you move on to step 7, to automatically link the call to the enquiry case.

5. A call will be logged automatically if there is a unique match in an enquiry case or contact based on IVR input. If this is not the case, click on the arrow on the right edge of the Amazon Connect interface to log manually.

6. Click Execute to create an Inbound Call Task record related to the Contact record. The Inbound Call Task will appear on the screen behind the Amazon Connect interface.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
7. Add comments regarding the call during or after the call. Click Edit Comments.

8. Add comments, then click Save. Comments will be added to the Task record and are accessible from the Activity feed on the Contact record.

9. Once you have finished the call click End Call then Close Contact

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
Calling a Contact in UQ Engage

**Purpose:** UQ Engage allows you to call contacts through Amazon Connect. Follow these steps to learn how to make an outbound call using the CRM.

1. Navigate to a record in UQ Engage, such as a contact, case or opportunity. Making an outbound call will associate the call log with the record and the contact.

   Click on the Amazon Connect in the utility bar

   If you haven’t done already, sign in to Amazon Connect using your UQ SSO

2. By default, you will appear Offline when signing in. Outbound calls can be made in any status. When you change your status to Available, this will allow you to receive incoming calls.

   Click on Number Pad

3. Ensure you have selected Australia as your country

4. Enter in the phone number using the dial pad in Amazon Connect or the numbers on your keyboard and click Call

If you have questions, contact:

E: UQEngageCRM@uq.edu.au
Handy Tip! Once logged in to Amazon Connect, you can call a contact directly from the contact record or the enquiry case. A contact’s phone number will be preceded by a purple phone. Click the phone number link to start the call.

5. Once connected, you will see additional options in the Amazon Connect interface, including Hold, Mute and End Call. When in a call, a screen will open called Outbound Call Task in the Tasks tab.

6. Add comments regarding the call during or after the call. Click Edit Comments to add, then Save.
7. Click End Call to finish your call

8. Easily navigate back to the related contact or related record from the task record.

**Handy Tip!** Users using the Service Console, will see the record open in another tab.

9. Call details are accessible from the Activity feed on the Contact record

If you have questions, contact:
E: UQEengageCRM@uq.edu.au
UQ Engage

E  UQEngageCRM@uq.edu.au
W  https://marketing-communication@uq.edu.au/uq-engage