UQ Engage Foundations Quick Reference Guides
Phase 1 Release 2 QRG Guides

Innovation in customer engagement
Purpose Statement

Quick Reference Guide (QRG)

This Quick Reference Guide (QRG) booklet will provide you 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
Icons and Terminology
Icons and Terminology

The following images define commonly used CRM terminology and the context in which they are used in UQ Engage. The associated CRM icon has been included next to the term.

<table>
<thead>
<tr>
<th>Term</th>
<th>Icon</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Program Interest</td>
<td>📚</td>
<td>Academic Program Interest represents pre-application program interest. After a prospective student submits an application, the existing Academic Program Interests will be set to inactive, and any post-application program interests will be represented by Preferences.</td>
</tr>
<tr>
<td>Account</td>
<td>📋</td>
<td>An account is used for multiple purposes, an administrative account, an organisation and an academic program. Each contact is related to an administrative account. For example, contact John Smith would have a John Smith administrative account. The administrative accounts in the CRM are automatically created in the background. You will not actively use them in UQ Engage but will see them in search results.</td>
</tr>
<tr>
<td>Affiliation</td>
<td>🔗</td>
<td>Affiliations are the connection between a Contact and an Organisation (Account). They mainly represent the employment relationship between a person and an organisation.</td>
</tr>
<tr>
<td>Application</td>
<td>📧</td>
<td>Applications are formal requests prepared by prospective students or agents to apply to a UQ program. The application records in UQ Engage contain the draft (not yet submitted) applications and the applications submitted to UQ.</td>
</tr>
<tr>
<td>Attendees</td>
<td>📘</td>
<td>An attendee record reflects the contact’s registration and attendance status for an event. The attendee record also contains the details submitted by the registered attendee when they register for the event.</td>
</tr>
</tbody>
</table>
## Icons and Terminology cont.

<table>
<thead>
<tr>
<th>Term</th>
<th>Icon</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cases</td>
<td></td>
<td>Cases are the core lead and enquiry management object for the UQ Engage process.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>There are two types of cases:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. prospective student enquiries</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. prospective student leads</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The prospective student enquiry case is the core object for the enquiry management process, while the prospective student lead case is the core object for the lead capture activities.</td>
</tr>
<tr>
<td>(Enquiry) Case</td>
<td></td>
<td>Each Enquiry Case contains personal details and questions captured when a stakeholder requests support or information. Enquiry Cases can be assigned to a queue or an individual CRM user.</td>
</tr>
<tr>
<td>(Lead) Case</td>
<td></td>
<td>Each Lead Case contains personal details and interests captured from a stakeholder, e.g., prospective student, parent, counsellor. When a Lead Case is created, the CRM will automatically link it to a new or matching contact and assess if it meets the criteria to be converted to an opportunity.</td>
</tr>
<tr>
<td>Contact</td>
<td></td>
<td>The contact record contains information about an individual associated with a specific account. The minimum contact information needed to create a record includes the prospective student’s first name, last name, email, home phone number or mobile number and the contact source. This record contains core profile information of a person, such as their name, current location, citizenship and email address.</td>
</tr>
<tr>
<td>Dashboard</td>
<td></td>
<td>Dashboards allow for multiple reports and charts to be presented side-by-side on a single dashboard layout (referred to as ‘components’) which provides a visual display of key metrics and trends for data in the CRM. All users can create their private dashboards. Public dashboards can only be created by the Power Users of the team.</td>
</tr>
<tr>
<td>Events</td>
<td></td>
<td>Events represent the group engagement activities organised by UQ or an external organisation. The event can be an online-only event, an in-person-only event or an online and in-person event.</td>
</tr>
</tbody>
</table>

If you have questions, contact:
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Icons and Terminology cont.

<table>
<thead>
<tr>
<th>Term</th>
<th>Icon</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunities</td>
<td>🏛️</td>
<td>Opportunities are a potential agreement the University could make with a person or organisation. A person or organisation can have multiple opportunities at the same time. In Phase 1, there are two types of opportunities: 1. UGRD student recruitment opportunity 2. PGCW student recruitment opportunity These opportunities can be converted from a prospective student lead if sufficient information is provided, manually created by staff or created automatically from an application.</td>
</tr>
<tr>
<td>Preferences</td>
<td>🌐</td>
<td>An application can have multiple preferences. Each preference represents an expression of interest in studying an academic program commencing in a specified intake semester.</td>
</tr>
<tr>
<td>Relationship</td>
<td>👶🏻</td>
<td>Relationship represents a personal relationship between two contacts e.g., husband and wife, parent, and child. A relationship will not be used to represent an employment relationship. An Affiliation represents this.</td>
</tr>
<tr>
<td>Program Enrolment</td>
<td>📚</td>
<td>Student enrolment in an academic program offered by UQ.</td>
</tr>
<tr>
<td>Reports</td>
<td>📚</td>
<td>Reports are lists of records that meet defined criteria and can be designed for hierarchical reporting where the views can be defined for individuals and their teams. All users can create their private reports whilst public report folders can only be created by the power users of the team.</td>
</tr>
<tr>
<td>Term</td>
<td>📚</td>
<td>Each term represents an intake semester at UQ. All term data are managed and mastered in SI-net.</td>
</tr>
</tbody>
</table>
UQ Engagement Model Defined Terms

UQ Engagement Model

High-level Engagement Model (UGRD and PGCW Student Recruitment)

Prospective Student

A Prospective Student is a person who has the potential to apply and study at the University. Prospective student is a broad term that encompasses Unknown Person, New Lead, Qualified Lead and Applicant.

Unknown person

A person who is unknown to UQ.

New Lead

A New Lead is a person who has provided enough information to be identified and contacted. New Leads are usually potential customers who can be qualified based on the likelihood to consume a product(s) or service(s).

Qualified Lead

A Qualified Lead is a person who has provided enough information to be identified and contacted, and also demonstrated tangible interest e.g. undergraduate or post graduate coursework to study at the University.

Applicant

An Applicant is a person who has an active application to study at the University. Applicants can come from multiple sources like TACs (Tertiary Admission Centres), International Agencies and directly from the University’s website and they may be at any stage of the admission process (assessment, offering, acceptance, admission).

New Student

A New Student is a person who has accepted the offer to study at UQ but have not yet reached the census date with an active enrollment. Until census date, the person can still cancel the admission and withdraw from any enrollments with no liability.

Load Case

In CRM, the information required to create a Load Case are:

1. first/last name
2. at least one mode of contact (email/phone number)
3. the source of the lead including form submission, appointment, event, data migration, enquiry or web-in.

Opportunity

An opportunity is a potential agreement the University could make with a person or organisation. The agreement can be an Academic Program offering, Service offering, Donation, Partnership etc.

Application (submitted)

Applications are formal requests prepared by prospective students or agents to apply into a UQ program. The application record in UQ Engage contains the draft (not yet submitted) applications and the applications which had been submitted to UQ. One submitted application will be linked to one opportunity.

Engage

Specific goals

- UGRD/PGCW specific goal: To find out more information about the prospective student and identify whether UQ should continue to engage for study opportunity.
- UGRD/PGCW specific goal: To encourage the prospective student to choose UQ and submit an application to study.
- UGRD/PGCW specific goal: To assess and process the application and keep the prospective student engaged until they receive an offer / outcome.
- UGRD/PGCW specific goal: To provide support and information the students need to drive acceptance of offer.
- UGRD/PGCW specific goal: To prepare the student to start studying at UQ and to retain their enrollment beyond census date.

Contact person
Logging in to UQ Engage
UQ Engage - Logging in to UQ Engage

**Purpose:** Follow these steps to log in to UQ Engage

1. To access UQ Engage, log in to the following web address: uqengage.my.salesforce.com
2. Sign in using Single Sign-On (SSO). Confirm your UQ Auth to log in to the system

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
Navigating UQ Engage
Navigating the Recruitment Management App

**Purpose:** Identify the features available to you from the Recruitment Management app home page

1. **App Launcher** – The App Launcher allows you to switch between different apps. The Recruitment Management app will provide you access to manage the student relationship.

2. **Global Search** – Access the Global Search from any screen you are in, searching for all records that meet the criteria entered.

3. **Bookmark** – Favourite items you frequently use. If you're on a record or dashboard, simply click the star to favourite your item.

4. **Assistant Feature** – The Assistant will provide you with important updates throughout your day such as opportunities with overdue tasks, opportunities with no activity in 30 days, opportunities with no open activity and overdue opportunities. Click on an opportunity to go directly to the records’ details page.

5. **Edit a task or enquiry** – Your latest enquiries and tasks will display on your homepage. Need to make a change? Simply edit the relevant record as required.

6. **Create a new task** – You can create a new task from the homepage. Simply click the New button to bring up the new record screen quickly.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
Navigating the Marketing Management App

**Purpose:** Identify the features available to you from the Marketing Management app home page

1. **App Launcher** - The App Launcher allows you to switch between different apps. The Marketing Management app will allow you to view leads captured via a marketing channel.

2. **Global Search** – Access the Global Search from any screen you are in, searching for all records that meet the criteria entered.

3. **Bookmark** – Favourite items you frequently use. If you’re on a record or dashboard, simply click the star to favourite your item.

4. **Cases** - View your six recent cases. See the type of lead, who is enquiring and it’s status.

5. **Visuals** - Visualise your data in different charts

6. **Data on display** - See important data in an easy visual. Use the View Report link to open the reports’ function to view further detail, and save or export as needed.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
Navigating the Service Console

**Purpose:** Identify the features available to you from the Service Console home page

1. **App Launcher** – the App Launcher allows you to switch between different apps. The Service Console will allow you to manage your enquiries. It has a user interface built for efficiently managing enquiries and records.

2. **Navigation Menu** – Use the quick links to navigate to the desired page easily

3. **Global Search** – Access the Global Search from any screen you are in, searching for all records that meet the criteria entered.

4. **Bookmark** – Favourite items you frequently use. If you’re on a record or dashboard, simply click the star to favourite your item.

5. **Today’s Tasks** – See at a glance your next five tasks due today

6. **Chatter Feed** – View recent and all collaborations with your peers. View information such as what you are following and when you receive an email @mention.
Navigating the Event Management App

**Purpose:** Identify the features available to you from the Event Management app home page

1. **App Launcher** - The App Launcher allows you to switch between different apps. Access the Event Management app to create and manage an event.

2. **Global Search** – Access the Global Search from any screen you are in, searching for all records that meet the criteria entered.

3. **Bookmark** – Favourite items you frequently use. If you're on a record or dashboard, simply click the star to favourite your item.

4. **Attendee Summary** - See a visual of attendees who registered or attended a recent event with a quick link to view data as a report

5. **Recent Events** - View events you recently viewed, including the event name, start and end date. Click on an event to open it in full detail.

6. **Recent Registrations and Attendances** - View the attendee records you recently viewed. See their Registration and Attendance Status and the start date of the Event.

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

**Purpose:** Follow the steps to learn how to use the App Launcher in UQ Engage

1. When you log into UQ Engage you will see the App Launcher waffle button

2. Click on the App Launcher waffle button to navigate between the apps you have access to

3. Click View All to see all available apps and items

4. Click on the app you want to open. Each app will display differently, such as the homepage layout and the navigation bar items; however, the information you access remains the same across the apps.

5. Move apps around in order of preference. Simply hover over the dots on the icon card until you see the word ‘Reorder’ and drag and drop where you want to move it.

If you have questions, contact:

E: UQEngageCRM@uq.edu.au
Global Search

**Purpose:** Follow the steps to learn how to use the Global Search function in UQ Engage

1. The Global Search function is located at the top of UQ Engage. This allows you to search all records on all UQ Engages’ pages. The search bar follows AND/OR type operations.

4. Click in the search field to open the search function

5. Here, you will see your top searches. If you don’t have any top results type in the key term you want to search, then click Enter. Your search results will return any records containing the search term(s).

**Handy Tip!** A new user’s global search will not fetch any results in the ‘Top Result’ section to start. Results will appear as UQ Engage learns what frequently used objects you use. Until these results build, you can either select the object to search for in the global search or navigate to different sections of the results page based on the object you search.

<table>
<thead>
<tr>
<th>Search Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asterisk (*)</td>
<td>Broaden your search results with the asterisk. Use to include one or more characters in the search term. For example, if you search Bob Jo*, you will find the records with Bob Jones and Bon Johnson.</td>
</tr>
<tr>
<td><strong>AND</strong></td>
<td>Finds records that match all of the search term. For example, acme AND bethesda finds records with the words acme and Bethesda.</td>
</tr>
<tr>
<td><strong>OR</strong></td>
<td>Finds items with at least one of the search terms. For example, acme OR bethesda finds records with either acme or bethesda or both acme and bethesda.</td>
</tr>
<tr>
<td><strong>AND NOT</strong></td>
<td>Find records that do not contain the specified search term. For example, acme AND NOT bethesda finds records that have the word acme but do not have the word bethesda.</td>
</tr>
<tr>
<td>Quotation Marks</td>
<td>Use quotation marks around search terms to find an exact match. This can be especially useful when searching for text with punctuation. For example, “acme.com” finds records that contain the exact text acme.com.</td>
</tr>
<tr>
<td>Question Mark ?</td>
<td>Use the question mark wildcard to match a single character. For example, searching for jo?m finds items with John and Joan.</td>
</tr>
</tbody>
</table>

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

Purpose: Follow the steps to learn how to use List Views in UQ Engage

List views are a fast and easy way of viewing and analysing data important to you. They allow you to view specific records and edit single or multiple records simultaneously.

1. Access list views from an objects tab. Use the dropdown menu to select from the list views already pre-set by UQ. If there are a lot of lists in the menu, search to locate the one you want quickly.

2. You can also search within a list view to quickly find specific records

Important! You will only see the first 2000 records and all searchable fields are searched, not just the fields visible on the list view. If you cannot locate a record, use Global Search to find it.

3. Refresh your data by clicking the refresh button

4. You can also choose how you would like your data to display. Use the standard table view or choose the Kanban view, showing the data in its workflow. Use split view to manage bulk enquiries and records.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
Handy Tip! You can edit records whilst in a list view

5. Click the pencil icon on the editable field

6. Select the record change you want; we will update the case status in this case.

The edited field will be highlighted in yellow

7. Save your change once complete

Handy Tip! You can update multiple records at once if they require the same change. Simply select the records that need the same change, edit the field on one and apply it to all.
Favourites

Purpose: Follow the steps to use the Favourites function in UQ Engage

1. If you’re on a record, dashboard, or something else you like, you can bookmark your item by clicking the Star icon to favourite it.

2. You can deselect it whilst on a record by clicking the star icon again

3. Edit your favourite records list by clicking on the dropdown arrow and clicking Edit Favourites

4. Edit the items on the list, renaming them by clicking on the pencil icon or deleting them by clicking the x icon. Click Done once complete.
Contacts
Creating a Contact

**Purpose:** There may be times when you need to create a contact record manually in UQ Engage. This may be when you receive an email enquiry that is not linked to an existing contact, when you meet someone in person or handle a phone or walk-in enquiry for example. Follow the steps to create a contact record in UQ Engage.

**Important!** Before creating a new contact record, do a Quick Search to see if one already exists. If a record already exists, the system will stop you from creating a duplicated record manually.

1. Click on the Contacts tab
2. Click New
3. Enter the Contact details then click Save

The minimum contact information you need to create a record includes:
- First name
- Last name
- Email, home phone or mobile number
- Contact source

**Handy Tip!** If you have a prospective student who only has one name, say their last name, you can put a full stop in the first name field as it is a mandatory requirement for creating a contact.

**Contact Source** – Choose where the student was referred from

**Communication Preferences** – These are used to store the consent for different marketing communication types and the consent date and channel. When creating a contact these fields must be locked and updated via the Update Communication Preferences button.

**Subscription Management** – Nominate the prospective students preferred means of communication. Here we can see if they are opt-out of SMS, promotional communication and emails.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
Updating a Contact’s Communication Preferences

**Purpose**: Follow the steps to update a contact’s communication preferences

1. Select the Contact you would like to update by clicking on the Preferred Name link

2. Click the Update Communication Preferences tab

**Important!** Communication preferences cannot be edited directly from the contact record as UQ needs to ensure privacy compliance is met when we capture consent for marketing communication

3. A pop-up box will display asking whether the contact wants to listen/read UQ’s privacy notice
   - If you choose **Yes**, the Privacy Notice will display when you click Next
   - If you choose **No**, the Privacy Notice will be skipped when you click Next

Choose from the options then click Next

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
4. Choose from the options in the Update Communication Preferences box, selecting from the list. Click Next.

**Important**! The contact will need to respond via SMS to opt-out to receiving SMS

5. Complete the consent source, selecting from the list. Click Next.

The contact record will be updated with the new preference settings, the most recent consent date for each communication preference and the source for each preference.
Opportunities
Creating an Opportunity

Purpose: Follow the steps to create an opportunity in UQ Engage

Handy Tip! You cannot create an opportunity in the same study level if an open opportunity in the same study level already exists

1. Click on the Opportunities tab
2. Click New

3. Select the type of opportunity you want to create then click Next

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
4. Enter the opportunity details to build a profile for the prospective student. This may include their referral details, current study and pathway. Click Save.

Contact – Choose the contact the opportunity relates to

Opportunity Name – This field will be overwritten by the system when the opportunity is saved, so it does not matter what you write here.

Close Date – This field will be overwritten by the system when the opportunity is saved, so it does not matter what you write here.

Stage – Choose from either ‘Verifying Interest’ or ‘Engaging’. The other stages are populated through system integration.

Opportunity Source – Choose where the prospective student enquiry is coming from

Student Type – This field indicates whether the opportunity is for a domestic or international student

Your opportunity will be created

5. See the stage the opportunity is at

6. The opportunity name will automatically populate in the format of [student type][career code][name]

7. The close date will automatically populate two years from the date of creation

8. To edit a saved opportunity, click on Edit to open the whole record, or click the pencil icon in a field for in-line editing, saving your changes as you go.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
Understanding and Updating Opportunity Stages

**Purpose:** Opportunities progress along stages controlled through automated processes within UQ Engage. There are however, two manual processes that may be performed:

- Progressing an opportunity to the ‘Engaging’ stage
- Closing an opportunity to ‘Opportunity- no converted’

Follow the steps to update an opportunities stage in UQ Engage

1. Opportunity stages are visible in an opportunity record, with the current stage highlighted in purple. Hover over the current stage to see how long the opportunity has been at this stage.

2. Manually progress the opportunity to its next stage ‘Engaging’ by clicking on the ‘Engaging’ button and then clicking the Mark as Current Stage button.

3. The previous stage will turn light purple with a tick, with the new stage highlighted in purple.
Let’s now take a look at how we can progress an opportunity from a ‘Finalising Opportunity’ stage to a ‘Closed’ stage.

**Important!** An opportunity should only be closed manually for one of the below reasons. Extra care needs to be taken when closing an opportunity in the application under assessment, awaiting acceptance and finalising opportunity stages, as the application will not create a new opportunity via system integration after the opportunity is closed manually.

- Opportunity – No Longer Interested
- Opportunity – Duplicate
- Opportunity – Insufficient Funds
- Opportunity – Contact Unreachable
- Offer – Accepting Elsewhere
- Offer – Offer Letter Not Received

**4.** Manually progress the opportunity by clicking on the ‘Closed’ button then clicking the Select Closed Stage button.

**5.** In the Edit Dependencies pop-up, select Opportunity closed – not converted. This is the only option the system will allow you to choose as automated processes govern the others.

If you have questions, contact:

E: UQEngageCRM@uq.edu.au

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Once the opportunity is closed, an orange notification bar will appear on the record indicating that no further updates can be made to the record.
Collaboration
Using Chatter

**Purpose:** Chatter is a real-time collaboration tool. It allows you to like and comment on posts, and @mention another user. Follow these steps to use Chatter in UQ Engage.

1. **Posts** – Scroll through the feed to view your latest posts and recent activity
2. **Post function** – Collaborate with your colleagues and the contact
3. **Search** – Use Search to search for posts and filter the results to include only your posts or all updates
4. **Bookmark** – Bookmark posts that you are interested in to track any updates. Check out the Bookmarking Items QRG for more information

5. **@mention and /** – Use @mention when creating a post to notify another user of an update or status change on a Case record. Simply add your post and @mention and Share. @mentions will display in the feed for future reference. You can also add a / to link to another object in the system, such as an event.

**Handy Tip!** Once a user has been tagged once in a post, you do not have to re-tag them in corresponding posts.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
You can view Chatter notifications in multiple places.

6. Click the bell icon to view your notifications. Click on the notification to bring it up in more detail.

7. Another option to view is through your UQ Engage profile. Click on the Profile icon in the top right-hand corner of the screen and click on your name. Your Chatter activity will display.

8. In the Service Console access your Chatter Home Page from the Navigation drop down menu.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
9. See what you follow, @mentions specifically for you, and items you have bookmarked. Check out the Bookmarking Items QRG for more information.
Bookmarking Items

**Purpose:** Bookmarks can be used in UQ Engage to track posts you are interested in. Follow the steps below to learn how to bookmark a post and where to view them in the Bookmark feed.

1. **If you would like to track a post in the Chatter feed, simply click the drop-down arrow next to it and select Bookmark**

2. **Once the bookmark is added, you will see the green bookmarked icon next to the post**

If you have questions, contact:

E: UQEngageCRM@uq.edu.au
3. To view your bookmarked posts, open the Chatter Home Page

4. See your Bookmarked Items and if you no longer need to track an item, remove the bookmark using the same process used to apply them

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

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