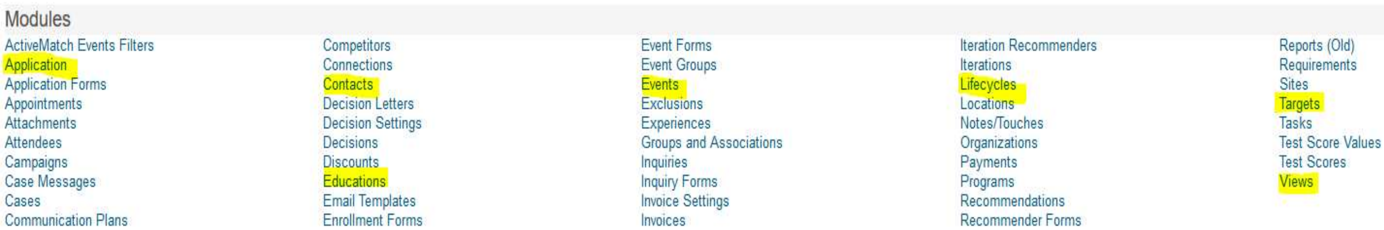
RADIUS CRM BASICS

Last Updated: 11/21/2017

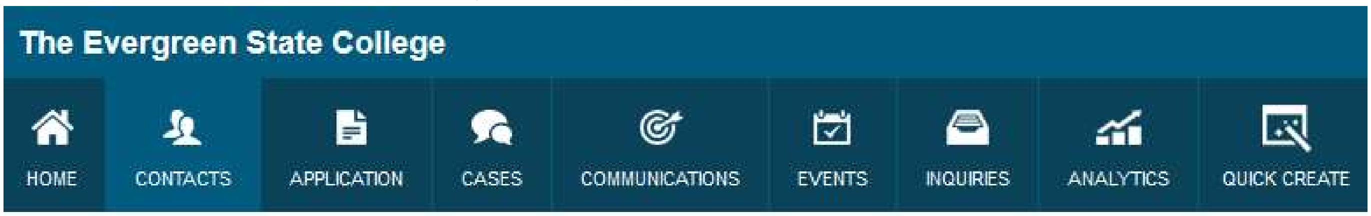
RADIUS STRUCTURE AND KEY MODULES

Modules

Radius is a collection of interconnected Modules. Below is a listing of all the modules available within Radius. Depending on your level of access, you may only be able view some of the modules. The administrator manages modules via the Setup portion of the system.



To access the various modules, first go to the Top Menu bar on the Radius main screen.



Profiles, roles, and users

Users: Each person requesting access to Radius are setup as USERS within Radius. Your user login will be your Evergreen email address.
User Password: An account PASSWORD is created by the new user via an Account Activation Email sent at the time the user is added to Radius.

User Role: The ROLE of the user is closely aligned with what they do within their department or team. The role allows a hierarchical structure to be created within Radius (who reports to who). The role will often dictate the profile, or level of access, allowed within Radius.

User Profile: Each user is assigned a PROFILE that allows, or manages, module-level permissions and access. The profile defines what the user can, or cannot, do within Radius. The profile allows different users from the same department or team to have different levels of access to data.

Security Settings: In addition to the Role and Profile of each user, there are also field level securities available within each profile. These settings allow for editing, read-only, or visibility of a specific field. Different profiles will have different levels of access ranging from all access to view only access.

Contact Module

The Contact Module is the base module for all records created in Radius. Other modules such as Application, Requirements (checklist), Recommendations, and Campaigns build off the Contact Module. Visible fields within the Contact Module are dependent on the User Profile and Security Settings.

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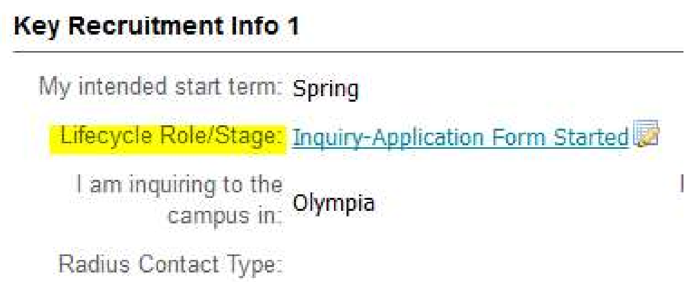
Lifecycles

Lifecycles: This is used on Contact Records to track the contacts as they move through the admissions cycle. The lifecycle consists of a role and stage, which are assigned, or updated, at various stages in the application process.

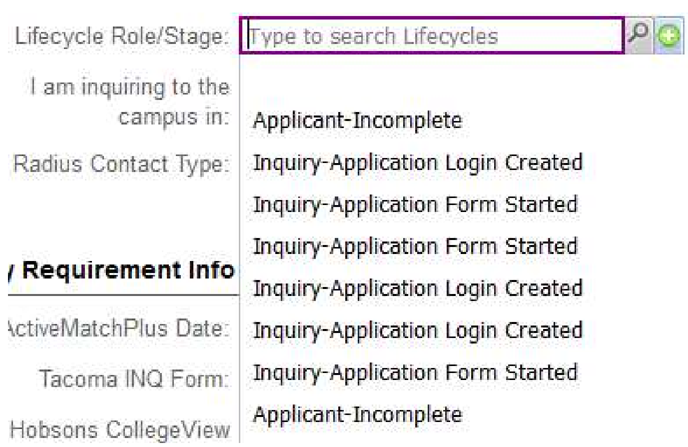
Lifecycle Role: The role lets the user know if the contact is a Lead, Inquiry, or Applicant. This is assigned either by the contact completing an on-line form, via the automated import process from Banner, by a manual import process, or manually by a user that has field permission.

Lifecycle Stage: The stage lets the user know more specifically where the contact is in the admission cycle or application process. Examples of lifecycle stage are: Active, Inactive, Application for Started, Incomplete, Withdrawn (to name just a few). The stage is updated via the automated import process from Banner or by a manual import process, or manually by a user that has field permission.

The lifecycle role/stage is found on the Contact Module:



Example of Lifecycle history on a record:



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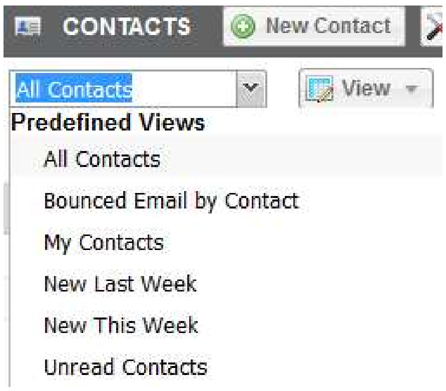
Listviews (Reports & Internal use)

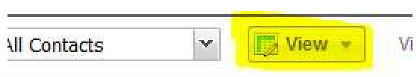
Listviews: Each module allows the user the opportunity to create listviews for reviewing or tracking of data. The ability to access data from different modules within each listview will depend on what module the user is in when creating the listview. For instance, creating a listview from the Contact Module will provide the access to the largest number of Radius modules.

Each Module has Predefined listviews (All Contacts. My Contacts, etc.).

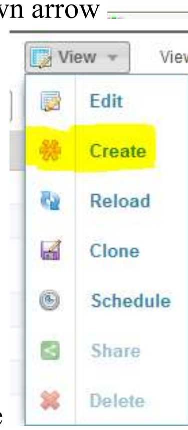


Each Module also allows for the user to create Custom Listviews

To create custom listview:



(a). From the View button, select the down arrow

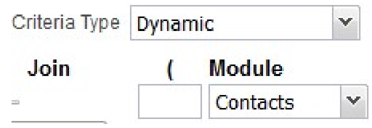


(b) From the dropdown list, select Create

(c) Guidelines for creating new Views:

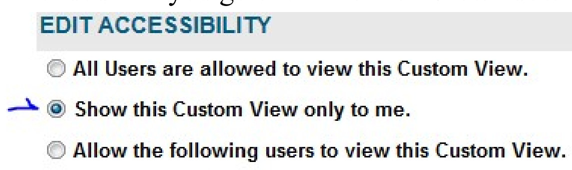
- "Naming Convention": Begin with your first and last name initials (capped) followed by a dash (-) when creating the View Name.  (Ex: JB – New Prospects)

- "Criteria Type":
  - The majority of your views will be "Dynamic". This will allow for additional of new records that meet



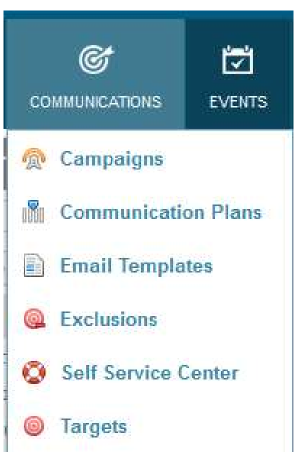
the specific criteria for that view.
  - A "Static" view can be used if wanting to follow a specific inquiries or applicants. This will be determined by the criteria selected when creating the view. No new names will be automatically added to this view; however, you can add additional names individually if you desire.

- "Sharing" a View: After saving your new custom view, you will have the option to Edit Accessibility of you view. This allows you to determine who can see and use this view. The default setting is "All Users…". It is recommended that you go back into the "View" down arrow and change the setting to "Show this …only to



me".

Targets, Campaigns, Email Templates and **Communication Plans** are all found under the **Communications Module.**



Target (Campaigns & Communication Plans)

Within Radius a Target is a group of contacts that meet certain user-specified conditions. Targets can be used to send email campaigns or event invitations to a group of contact records at one time. There are two types of targets within Radius: Static and Dynamic.

Static Target: Allows you to define exactly which contacts to include in your target list. You must add contacts manually to this list.

Dynamic Target: Allows you to define a target list based upon criteria. This list changes automatically based upon which contact records meet the established criteria at any given time.

Communication plans

Communication plans are unique and used for various reasons in the Radius system. For example, the user could create a communication plan to market to prospective students who have filled out an inquiry form on-line. A second user might develop a communication to assist applicants through the application process. Finally, another might develop a communication plan for students who have been accepted but need to complete the registration and welcoming process for the institution. In these examples communication plans are utilized for institution program marketing, and assisting students through the application and enrollment process. These are the most common use cases; however, communication plans are customizable and can be utilized in numerous scenarios.

Separate communication plans are necessary for each of these efforts. It is important to think through the entire process and develop all the emails associated with the plan prior to launching or developing the communication plan.

Communication plans use a series of emails that are sent out to a group of contacts based on pre-defined intervals of time, and they use targets with specific entry and exit rules. Since communication plans involve multiple different emails that are sent at intervals during the process, it is necessary to have all templates created before beginning the communication plan.

Communication plans are composed of three distinct parts:
Plan Information; Plan Details (Entry & Exit Rules); Template Details (Email Templates)

Campaigns

Campaigns provide the ability to send a **one-time mass email to an identified target list**. The role of campaigns is to promote a single message or cause, and evaluate its effectiveness. Creating a campaign is simple and requires the user follow a defined step-by-step process.

Email Templates

Email Templates are used for one-off emails to a contact, within Campaigns, and for Communication Plans. Each new user has a ‘master’ email template created with Evergreen branding, department specifics, and their individual signature. Once the master template is created, the user is able to clone the template to be used in for specific messages.