**“Tricks” of Radius**

BROWSER:

1. Want to choose the best web browser for Radius?

* Open in Chrome or Firefox or Safari (better than Internet Explorer versions 9 and 10)

1. Want to stay logged into Radius?

* Log into Radius and keep active in Radius. If no activity for over 45 min, you are automatically logged out.
* If automatically logged out, close all Radius windows you had opened. If you don’t close all Radius windows/tabs, Radius will keep logging you out in all the other windows.

1. Want to search for a name or other word on a page in Radius?

* First click in the contact record and then press “Ctrl” then press “F” to open a Find search bar (at the bottom, left corner of the screen). It may not work in all cases and on all types of Radius pages.

1. Want to open a contact record in a new tab?

* Put your curser over the contact name (first or last). Right click on your mouse. Options appear. Click on “Open in a new window” to create a new tab with the contact information. You can then close this contact without losing your original search.

SEARCHING FOR RECORDS IN RADIUS:

1. Want to search for a name or other part on the Contact page?

* First click into Contact by selecting the first or last name. Press “Ctrl” then press “F” to open a “Find” search bar (usually located at the bottom, left corner of the screen).

1. To search in Radius: USE \* as wildcard symbol
2. Can search by first name, last name, email \*

Berni\*@\*

\*bern\* = search for particular

Part of student ID

1. Search under A# if given, DOB if given, First name, Last name, possible nicknames, email addresses, etc.

Inquiry may have completely changed their names (first and last) but kept their old email address.

We have graduate inquiries who send transcripts for institutions attended 30 + years ago with maiden names/legally-changed names, old mailing addresses, no email, etc. that are difficult to match.

1. What does this mean…A#.01 or A#.02 or A#.03 or A#.04?

* This designation, like “A#.01” or “A#.02” means this is a parent or other person associated with the main student’s A#

WEBPAGE FORMATTING:

1. Double-click on column divider to open column width for each column.
2. To open new Radius window: left click on Module (ex: Contacts), drop down menu appears, right click on new window you wish to open – left click on “Open in a new window”.
3. LISTVIEW DROP DOWN –
   1. You can either start typing part of the name in the box or you can scroll through the list of options (arranged alphabetically)
   2. This is a smart search (it will look for parts of words). The drop down menus will be hidden if you choose the down arrow and then change to try typing in the box for a specific word. The options do not pop up in front, they pop up behind the list view creation box… If you get stuck, move to another screen and come back to the module again to search for the listview.

LIST VIEWS:

* Can search in list view drop down menu by entering the first letters if the word you are searching for (smart search field)
* Make sure you open up (expand) the module in the drop down menu by clicking on the down arrow “˃” before searching in the smart search box. If the module is not expanded, the search will not find anything in that contracted module

EMAILING FROM RADIUS:

1. Always work with an email template that is built with updated Evergreen branding (check with CRM Manager for help)
2. We recommend that you all BCC to your own email address so you can see what the recipient will see when they receive your template email.
3. If you want to CC or BCC, click on these buttons at the top of the email pop-up and hand enter the email address. If you want to use more than one email address, be sure to use the following format: ([mobbsa@evergreen.edu](mailto:mobbsa@evergreen.edu), [graduateadmissions@evergreen.edu](mailto:graduateadmissions@evergreen.edu)) If you don’t use this format, the message will not be cc’ed or bcc’ed to any of the emails included.