Banner Relationship Management (BRM) Overview

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Tips:

• Only Prospects and Students can be viewed in BRM. (must have a recruit or general student record in Banner)

• Do not click the browser back button; you will close your session of BRM. Use the tabs within BRM to navigate between topics.

• If BRM times out or you log out, click the browser back button to access the Enterprise Login page. You cannot log back in on the Sungard BRM login page.

• You cannot delete interactions.

• Use consistent Subject Lines in manual interactions and emails.

• Use the Refresh button at the top of each page -
Log in to BRM via: [https://apps.uillinois.edu/](https://apps.uillinois.edu/). Select - Administrative Applications

Select - Student Administration

Select - Banner Relationship Management (BRM) and log in with your Enterprise ID and password
**Prospects tab** is default view. Prospect tab consists of Search for Prospects, Population Lists, Interactions, and Funnels sub tabs. Note – a recruit record must exist in Banner.

Type search criteria, select More Attributes for additional search filters. Use wildcards (%), but cannot be used as first character in search, e.g. - %Wilson is an invalid search. Click the Go button to initiate search.
Highlighting a record displays the Profile Summary. Double click on record or Open button to select.

Profile Summary displays and is divided into eight sub tabs. Click on side tabs to view specific topics.
**Students tab** – Students tab consists of Search for Students, Population Lists, and Interactions.

Note – a General Student record must exist in Banner.

View and Create an Interaction. All interactions generated by BRM and responded to by the prospect are displayed in BRM including contacts in Banner. Add a manual interaction by selecting Create Interaction.
Select the appropriate Organization, Category, Type, Subject and add comments. Add a tag if appropriate and Save. **NOTE** – Interactions cannot be deleted once they are saved.

New interaction is displayed
Create a contact. Select the appropriate Subject, Category, and add message. The email will be sent after clicking Send button.
Message has been sent

Click the Refresh button to display new interaction.

New contact/interaction is displayed
View/Refresh Population Lists – go to Population Lists tab

- Highlight pop list and double-click or Open button

View Profiles; Recalculate Pop List and Copy Contents to a Spreadsheet.

- Select individual profile. Summary displays.
- Contact all or a selection of people from list

Select More Actions to Recalculate List
Copy results to a clipboard and paste into a spreadsheet

**Funnel Status/History** – select Funnel History in Profile Summary. Funnel Status shows what state the prospect is at in the prospect/admissions process.
Applicant is in two Funnels – College and Overall funnels- Current State – Admit in both funnels

View College/Program Funnels
Funnel States display

Communications – view communications templates and folders.
Select the Template Content tab to view the template text.

Communication Log – review errors from campaigns. Note: the log only displays 2500 entries so you will need to filter your search to return a smaller number of entries.

Communication errors display, open to view error.
View the error message.

Details
An error has occurred while sending a communication using PREPROCESSING

Error Details:
An error has occurred while attempting to send communication to 'Tatiana L. Williams' using one of the following communication method(s) 1. EMAIL. Reason(s): 1. Email address of profile is either empty or invalid.