Accessing Your Customer Relationship Management (CRM) Instance

Manage customers, update registrants, and communicate with users through the new Customer Relationship Management (CRM) tool.

To Access and Open Your CRM Instance

- 1. Sign in to 25Live using your administrator (-1) credentials.
- 2. Select Go to CRM from the Go To Tool section of the More menu. If you are logged in as an administrative (-1) user, and the Go to CRM link is not available, follow the steps below under CRM Security Requirements and First Time Access.

^t ∰ 25Live	🖄 Event Form	🔄 Tasks	Jane Smith	■More			
Go to Tool Group Administration							
Data Import Tool							
	25Live Reports						
	LYNX						
	Optimizer						
	Outlook Sync Administration						
	X25 Analytics						
	Chat						
	Go to CR	RM					

CRM Security Requirements and First Time Access

In order to access your CRM instance, an administrator (-1) must give your security group the proper permissions to see the link in the **Go to Tool** menu. To do this, they will need to set **Tool Access**: 7.0 *Access to CRM Tool* to **Yes**.

CRM functionality is available to all 25Live instances and does not require any additional licensing.

CollegeNET Series25 Help and Customer Resources

Summary	Basic Options	Administrative Options	Academic Options	Tool Access	
Filter By Quest	ion	×			Save Cancel
i 1.0 Acces	s to Group Adminis	tration Tool			No Yes
i) 2.0 Access to Reports					No Yes
i) 3.0 Access to X25 Analytics Tool					No 💽 Yes 🗸
i 4.0 Acces	ss to LYNX Tool				No 💽 Yes
i 5.0 Acces	ss to Outlook Sync A	Administration Tool			No Yes
 6.0 Access to Google Calendar Integration Tool 				No Yes	
i 7.0 Acces	s to CRM Tool				No Yes
(i) 8.0 Acces	ss to Main Chat				No Yes 🗸

Once this setting has been switched to Yes, the CRM will need to be built. Click **Create CRM Instance** from the **More** menu to build the CRM. This process will take a few minutes to complete. Once finished, the button will be updated to **Go to CRM**, which you can use to move to the CRM instance.

Go to Tool Group Administration			
Data Import Tool			
25Live Reports			
Optimizer			
Outlook Sync Administration			
X25 Analytics			
Chat			
Create CRM Instance			
Image: If your CRM instance has not been built, you will need to click Create CRM Instance from the More menu and wait until the process is complete.			

Accessing Documentation

To access CRM documentation, login to your CRM instance, click on your profile icon in the top-right, and press the **Help** link. You will need to be logged in to view all CRM articles.

Records	Communications	Events	Configuration ~				
			System Overview Help				
			Log Out				
Image: Click on your profile icon to access the Help link in the dropdown menu.							