Umoja CRM Training

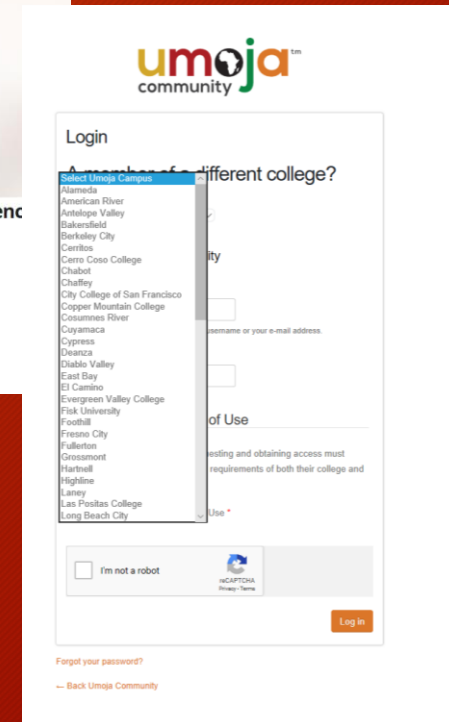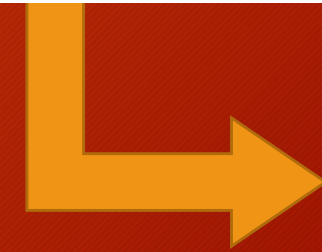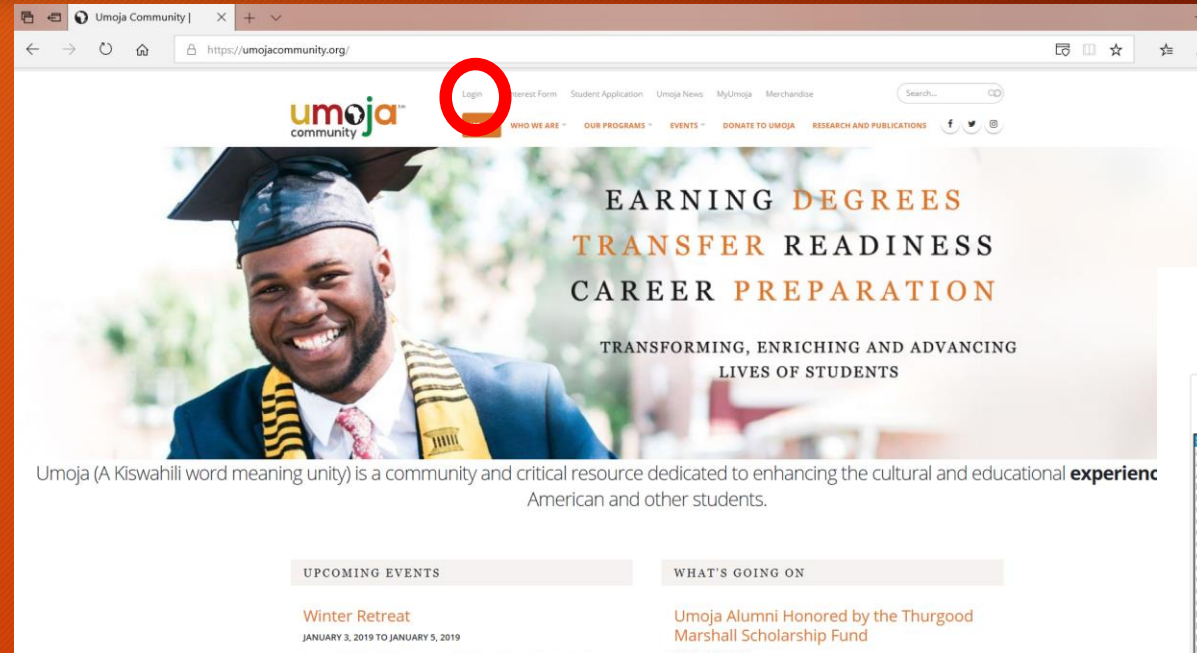Module two: Adding Student Data

Adding Student Data

Most student profiles are created by students when they complete the Interest Form or Student Application from your program Umoja page. This populates their name, email, student ID and any other information they add. You can edit students profiles with their updated information and status updates. When you have students to add manually, you can do so individually or as a group using this module as a guide.

Logging In

As an Umoja Coordinator you have your own log-in information. If you are a new Coordinator or have not accessed the CRM yet, contact the Umoja office for log-in information.

You can access your CRM page from the Umoja home page at:
https://umojacommunity.org

Select your college from the drop-down menu and enter your information.

CRM Home Page
What to look for:

Your college name in domain bar

Adding Students Individually

Before adding a student or student list, use the search functions to ensure that students are not already in the system. This will prevent duplicate and inflated data.

To add a student individually, have their name, email and student ID ready. You can include any additional contact or demographic information that you have in their profile as well.

Adding Students Individually

Select "Contacts" and click on "Add Individual" then "New Student"

The new student profile screen will appear. This allows you to enter student information individually. When entering student data, please enter full name, Student ID and email address at a minimum. Once you have added or updated the student profile, click save.

...and that's it!
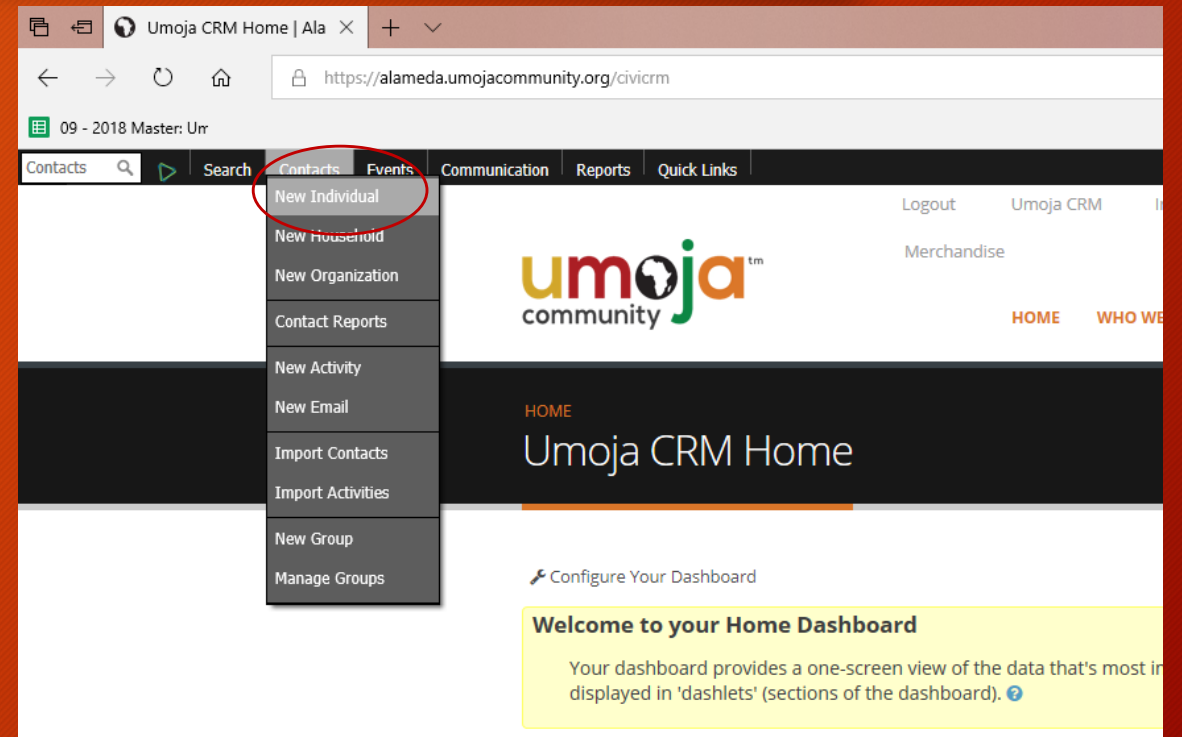
Adding Multiple Students
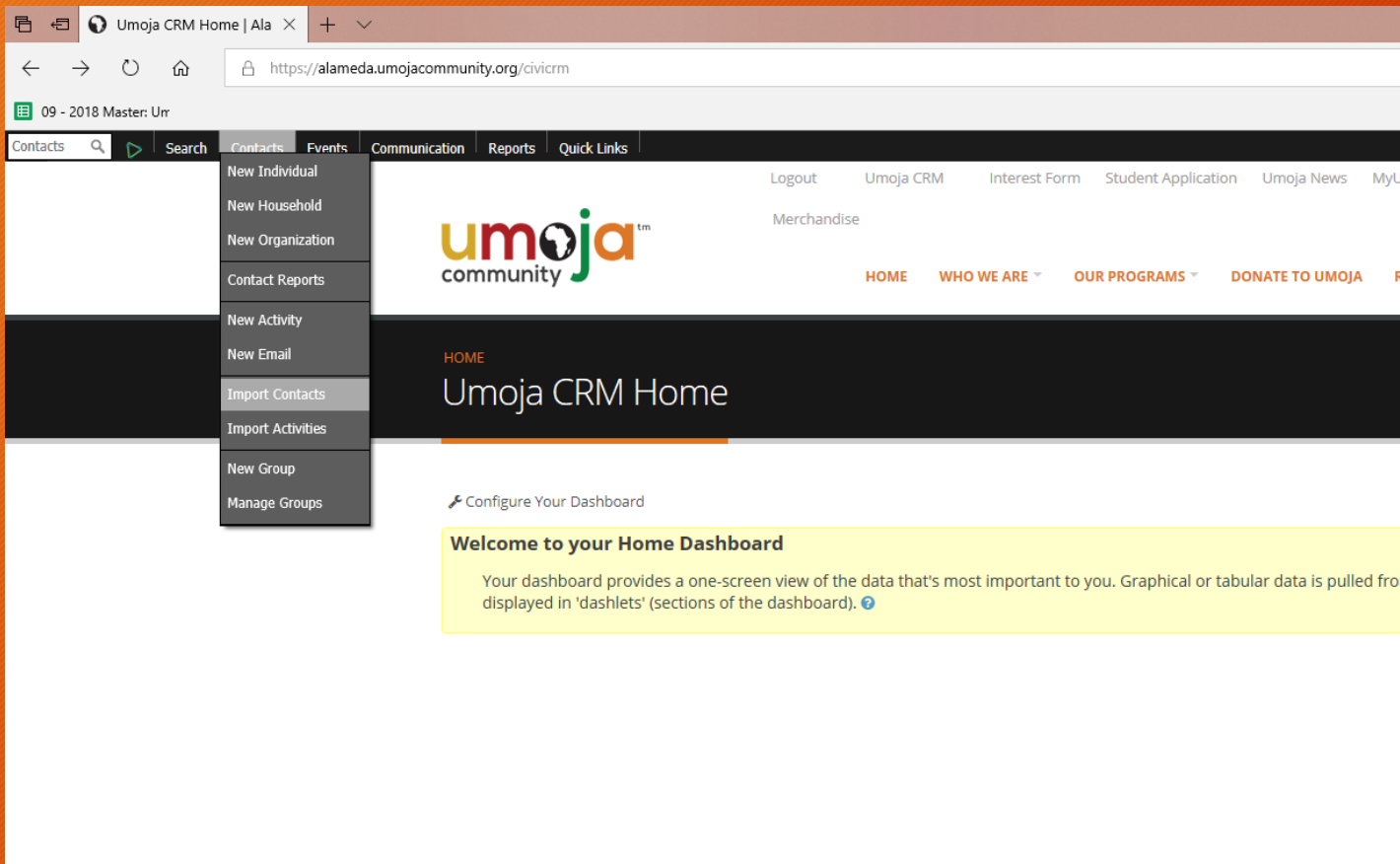
To add multiple students at once, you must have a Comma-Separated Values (CSV) spreadsheet to upload. If you have student data saved on an Excel spreadsheet, save the document as a (CSV).

To access this option, first click "Contacts" then "Import Contacts".

Adding Multiple Students

The first screen of the Import process is where you upload your document.

- Select "Browse" and locate your document to upload.

- Make sure you select the box that says "First row contains column headers" if your document has headers for each column (eg "First Name", "Last Name", "ID")

- Once you have selected your document and checked that box, click "Continue".

Note: You do not have to change or select any "Import Options". If you have preferences in this area, you may use it, if not, it will default to standard settings.

Adding Multiple Students

This next screen is a preview of how the data has imported.

- Use this screen to make sure your data fields (e.g. First Name, Last Name, Student ID) match
  - Use "External Identifier" for your Student ID numbers.

- If your fields match, click "Continue".

Adding Multiple Students

This screen allows you to preview your data before uploading. Use this screen to ensure you have the correct number of imports, screen for duplicates and identify any errors.

If there are errors that the system caught, it will notify you on this screen.

<u>Once you confirm those details, click "Import Now".</u>

After you have done this, your student data will appear in your contact search. Each entry will create a student profile that you can update, place in groups and add information to later.

Review Your Contacts

Once you have added your students and/or uploaded your data, go back to the search function to ensure that your data is there.

The number of entries should reflect the additions you made.

You can now search entries, group students and run reports!