Fig 1	UCD InfoHub My services & information portal		Students	Research	Human Resources	F
	Home / Systems / UniShare (CRM)					
	UniShare (CRM)					
		> My UniShare Maintain details of support provided ☆	d to students a	nd staff	 UniShare Report Management reporting a 	ing
Fig 2	My UniShare					

Search	Quick Tasks - Desk	Quick Tasks - Phone	Quick Tasks - Chat	Quick Tasks - Email	Team Followups	Team Referr
Bulk Uplo	bad					

Fig 3

Upload Contacts	Upload Contacts to CRM				
Upload a comma-delimited *.csv file wit There should be a header row and 3 col A) Student ID B) Mode Code (Valid codes are DESK, PH C) Comment	Upload a comma-delimited *.csv file with a list of contacts to upload. There should be a header row and 3 columns of data as follows: A) Student ID B) Mode Code (Valid codes are DESK, PHONE, EMAIL, WEBF, CHAT, MEET, QUICK, VIDEO) C) Comment				
File to Upload	Choose File No file chosen				
Upload Validate Only					

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rrals My Conta Numb	oer	0 20	<u> </u>
Format Cell	s		-
Number	Alicum	ant	Fo
<u>Category:</u> General Number Currency Accountin Date Time Percentag Fraction Scientific Text Special Custom	e		Sa co Tex The

Bulk Upload

- 1. Visit My UniShare on InfoHub (Fig 1)
- 2. Click on **Bulk Upload** (Fig 2)
- 3. Select correct **CRM area** (under Contacts Data Upload)
- 4. Choose your type of **Quick Task**
- 5. See notes on how to **Upload Contact** to CRM (Fig 3)
- 6. Follow all instructions, noting your list of students needs to be a .csv file with 3 columns:
 - A) Student ID
 - B) Mode Code (remember in capital letters)
 - c) Comment (if you need one noted in UniShare)
- 7. The .csv file will remove student numbers with '0' at the start. Need to change the format of the Student ID Column via > Number and then change to >Text. Then manually add the 0 back in. (Fig 4)







