

CUSTOMER RELATIONSHIP MANAGEMENT (CRM). HOW TO: REGISTER AND LOG A CASE

CRM is a system for managing all of TUT interactions with current and prospective students. The goal is to improve relationships by tracking all student communications

Step 1: Go to the Student Portal Page to register ([click here](#))

Step 2: Portal Registration Steps

1. On the Login page, click on **'Register now'** or **'Create an account'**.
2. On this page, fill in your details and Click **'REGISTER'**, Note: if already registered, use your TUT4LIFE email.
3. Once registered you will receive a **Thank You** message, then click on **'Login'** to create a case.

The screenshot shows the 'Log in' page of the Tshwane University of Technology. At the top right, there are links for 'Login' and 'Register now', with 'Register now' circled in blue. The main form has fields for 'Email / Username' and 'Password', a 'Remember me' checkbox, and a 'Forgot Password?' link. A 'LOG IN' button is at the bottom. Below the button, there is a link 'Not registered yet? Create an account' circled in blue. A yellow circle with the number '1' is at the bottom right of the form.

The screenshot shows the 'REGISTRATION' page. It has fields for 'First name', 'Last name', 'Email', 'Password', and 'Repeat password'. A 'REGISTER' button is at the bottom, circled in blue. Below the button, there is a link 'Already registered? Log in'. A yellow circle with the number '2' is at the bottom right of the form.

The screenshot shows a 'THANK YOU!' message: 'You are successfully registered.' At the top right, there are links for 'Login' and 'Register now', with 'Login' circled in blue. A yellow circle with the number '3' is at the bottom right of the message.

Step 3: How to create a Case

4. Click on **'Cases'** to create a Case
5. Click on **'Create New Case'**
6. Select your relevant Contact Type e.g. if you are a registered student, select **'Registered Student'**
7. Select the relevant **'Service Request'** e.g. Date of Graduation, complete the Service description, attach supporting documents if you have, then click **'Submit'** to create a case
8. This is a summary of your Case with a status of **'In Progress'**,



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A screenshot of a 'New Case' form. On the left, there's a dropdown menu for 'Contact Type' with 'Registered Student' selected and circled in blue. In the center, there's a dropdown for 'Please select relevant service request' with 'Date of Graduation' selected and circled in blue. Below this is a text area for the description and an 'Upload attachment' section with a 'Select Files...' button circled in blue. On the right, there's a summary panel with fields for 'Subject: Date of Graduation', 'Ticket Number: CAS-01129-LSB5Z2', 'Created on: 2024-08-02', 'Description: I Need to know My graduation Date', and 'Resolution Note: --'. At the bottom of the summary panel, there's a green bar with the text 'In Progress'.

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