

MERCY
COLLEGE

TALISMA[®]
CUSTOMER RELATIONSHIP
MANAGEMENT USER GUIDE

What is Talisma Customer Relationship Management (CRM)?

Talisma CRM provides true Constituent Lifecycle Management across recruitment, admissions, enrollment, marketing functions and enables institutions to quickly, effectively, and accurately communicate with constituents at any time. With Talisma CRM, Institutions have the means to accelerate and sustain growth by creating personalized experiences.

Talisma CRM client is the interface, using which users perform their daily operations in Talisma CRM. Talisma CRM client offers rich user experience and is very responsive and self-maintainable.

How will Talisma CRM effect my daily work flow?

Talisma is designed to make the daily functions of your job EASIER:

A college wide streamlined automated process will create a uniformed targeted messaging structure to all students from the suspect stage to the graduation stage and beyond.

Eliminates redundancy with outreach efforts across departments.

Provides an outlet for quantitative measures that will inform current and future trends related to territory management.

An individualized way to customize your approach and tailor your customer service based on each student's needs.

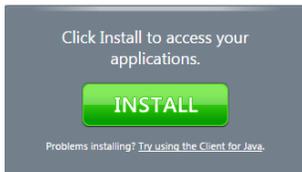
A centralized location to provide a more comprehensive institutional overview of historical data.

Logging into Talisma

1. Open Internet Explorer Web Browser and in the URL box type in: **campusnet.net**



2. If a login screen does not appear, Click "Install".



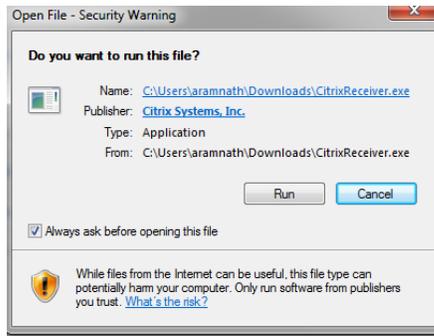
3. Click on Citrix Receiver (ICA)



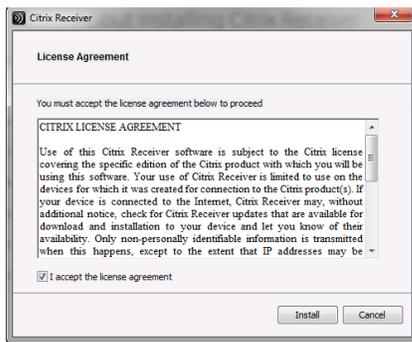
4. Click on Download Receiver 4.2 for Windows



5. Click Run. Once it downloads, a Citrix Receiver popup window will appear, click next.



6. Click Install. Once completed, Click Finish. Do not click "Add Account".



7. Re-open the Internet Explorer Web Browser and in the URL box type in: **campusnet.net**. A login screen should now appear. If it does not, refresh the browser or click "Skip to Login". The Login screen should now apply.
8. Type in Username and Password .*Reminder: Username begins with "296". The default password is "Tali\$ma1"*. You will be prompted to reset your password after your initial login.



9. Click on CRM-Train and press allow to the pop-ups that come up. The Citrix Receiver will then load and open the Talisma CRM Client.
10. Once the Talisma CRM Client is running, you will be logged in to your default user workspace.

! Logging Out: When exiting the Talisma CRM Client, correctly log out by selecting File and then Log Out. If you do not out correctly, this could cause difficulties for the next time you log in.