











UserName




Password

Streamline the student journey from the inside out

[Previous Page](#)User Board: 

-  Community
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life








-  Favourites
-  System Management
-  Online Help




Empty content area for the Home User Board.







[Previous Page](#)

User Board:

-  Community
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life


-  Favourites
-  System Management
-  Online Help








-  Edit Preferences
-  Change Password
-  About U4SM
-  Logout



Main content area (currently blank)


[Previous Page](#)


User Board: Home U



-  Community
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life

-  Favourites
-  System Management

 [Online Help](#)

 CRM

Build Version 20.2.13.2865

Tasks 0 Messages 0

Manage Preferences

General Preferences

Culture: Search Matching:

Theme

CRM Options

Default Task: Autoload CRM:

Bandwidth Settings:

Advanced Options

Show rule set execution results:

[Previous Page](#)

User Board: Home U

- Community
- Admissions
- Academic
- Communication
- Billing
- Financial Aid
- Student Life

- Favourites
- System Management

Online Help

CRM

Build Version 20.2.13.2865

Tasks 0 Messages 0

Manage Preferences

General Preferences

Culture Search Matching

- en-US
- fr-FR
- en-GB
- es-ES
- en-CA**
- fr-CA
- en-ZA

Autoload CRM

Bandwidth Settings:

Advanced Options

Show rule set execution results

[Previous Page](#)

User Board: Home U

- Community
- Admissions
- Academic
- Communication
- Billing
- Financial Aid
- Student Life

- Favourites
- System Management
- Online Help

Manage Preferences

General Preferences

Culture

Search Matching

- en-US
- fr-FR
- en-GB
- es-ES
- en-CA
- fr-CA**
- en-ZA

Autoload CRM

Bandwidth Settings:


Advanced Options


Show rule set execution results

[Page précédente](#)


Panneau utilisateur:


 

 Communauté


 Admissions

 Scolaire


 Communication


 Facturation

 Aide financière

 Vie étudiante

 Favoris

 Gestion du système

 Aide en ligne

 CRM

Version 20.2.13.2865


Tâches 0

Messages 0




[Previous Page](#)

User Board:


 [Edit Preferences](#)


 [Change Password](#)


 [About U4SM](#)

 [Logout](#)


 [Community](#)


 [Admissions](#)

 [Academic](#)

 [Communication](#)


 [Billing](#)

 [Financial Aid](#)

 [Student Life](#)








 [Favourites](#)



 [System Management](#)

 [Online Help](#)


[Previous Page](#)

User Board: Home U

-  Community
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life

-  Favourites
-  System Management

[Online Help](#)

 CRM

Build Version 20.2.13.2865

Tasks 0 Messages 0

Manage Preferences

General Preferences

Culture:

Search Matching:

Theme

CRM Options

Default Task:

Autoload CRM:

Bandwidth Settings:

Advanced Options

Show rule set execution results:



◀ Previous Page

User Board:

✕

Community

Admissions

Academic

Communication

Billing

Financial Aid

Student Life

Favourites


System Management


Online Help





◀ Previous Page

User Board:

 Edit Preferences

 Change Password

 About U4SM

 Logout

✕

Community

Admissions

Academic

Communication

Billing

Financial Aid

Student Life


Favourites

System Management

Online Help

[Previous Page](#)

User Board: Home U



[Community](#)

[Admissions](#)

[Academic](#)

[Communication](#)

[Billing](#)

[Financial Aid](#)

[Student Life](#)

[Favourites](#)


[System Management](#)

[Online Help](#)


Manage Preferences

General Preferences

Culture

en-CA 

Search Matching


Contains 

Theme



CRM Options


Default Task

All Tasks 

Autoload CRM



Bandwidth Settings:

Balanced (Default) 

Advanced Options

Show rule set execution results











Cancel




OK

[Previous Page](#)

User Board:



-  Community
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life

-  Favourites
-  System Management
-  Online Help



[Previous Page](#)

[Community](#)

[Admissions](#)

[Academic](#)

[Communication](#)

[Billing](#)

[Financial Aid](#)

[Student Life](#)

[Favourites](#)

[System Management](#)

[Online Help](#)

Applicant Management

- [Admissions Record](#)
- [Application Evaluation](#)
- [College](#)
- [High School](#)
- [Ranking List](#)

Setup and Planning



- [Event Management](#)








Data Analysis




- [Reports](#)

[Previous Page](#)

User Board:

-  Community
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life

-  Favourites
-  System Management
-  Online Help



Previous Page

Search Menu

- Community
- Admissions
- Academic
- Communication
- Billing
- Financial Aid
- Student Life

- Favourites
- System Management

Person/Organization Management

- College
- CRM Rank
- High School
- Organization
- Person

Staff Management

- Personnel
- Personnel Manual Synchronization

Data Analysis








- Reports




Faculty Activity Tracking

- Approved Completed Activities
- Completed Activity Approval



[Previous Page](#)

-  **Community**
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life

-  Favourites
-  System Management
-  Online Help

- Contact Information**
 - Address Association
 - Address Type Association
 - Contact Greeting Type
 - Copy Street Suffix to Country
 - Country
 - Department Contact Type
 - Electronic Address Type
 - Emergency Contact Type
 - External Organization Department
 - Mailing Address Field Type
 - Mailing Address Template
 - Mailing Address Template Field Separator Type
 - Mailing Address Type
 - No Contact Reason
 - Person Matching Action Type
 - Phone Number Type
 - Region
 - Staff Type
 - State or Province

- General**
 - Interaction Plan Group
 - Organization Type

- Imports**
 - Generic Leads


- Holds/Alerts**
 - Alert Type
 - Alerts
 - Hold Status
 - Hold Type
 - Hold/Alert Locations


- Identification**
 - ID Type (Organization)
 - ID Type (Person)


- Person**




[Previous Page](#)


 Community

 Admissions


 Academic

 Communication


 Billing

 Financial Aid

 Student Life

 Favourites



 System Management








 Online Help




 My Favourites

System Management - Membership Users

[Previous Page](#)


-  Community
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life

-  Favourites
-  System Management
-  Online Help

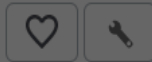
Contact Search

 Add

 Search 

Order By: 

Searches:
Display Name of contact, Electronic Address,
Generated Contact ID, System ID



My Favourites

System Management - Membership Users

+ Add

Previous Page

Search Menu

Community

Admissions

Academic

Communication

Billing

Financial Aid

Student Life

Order By: Last Name

Edit Favourites

*Name

Description

*Sort Order

Public Assign to me Assign to User


Favourites








System Management




Online Help





[Previous Page](#)




-  Community
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life

-  Favourites
-  System Management
-  Online Help







-  My Favourites
 - Community - Person
 - System Management - Membership Users


 Add


Order By: 





My Favourites


-  Community - Person  
-  System Management - Membership Users  


 Add


Order By: 


 [Previous Page](#)


 Community

 Admissions


 Academic

 Communication

 Billing

 Financial Aid

 Student Life

 Favourites

 System Management

 Online Help



Previous Page

Search Menu

Community

Admissions

Academic

Communication

Billing

Financial Aid





Student Life

Favourites



System Management

Online Help

My Favourites

- Community - Person  
- System Management - Membership Users  

+ Add

Order By: Last Name  

Confirm

Delete Item?








Cancel

OK




[Previous Page](#)







-  Community
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life

My Favourites

 [System Management - Membership Users](#)  

 Add

Order By: 

-  Favourites
-  System Management
-  Online Help



Previous Page

Search Menu


- Community
- Admissions
- Academic
- Communication
- Billing
- Financial Aid
- Student Life
- Favourites
- System Management
- Online Help








- Person/Organization Management**
 - College
 - CRM Rank
 - High School
 - Organization
 - Person
- Staff Management**
 - Personnel
 - Personnel Manual Synchronization
- Data Analysis**
 - Reports
- Faculty Activity Tracking**
 - Approved Completed Activities
 - Completed Activity Approval




+ Add

Order By: Last Name


[Previous Page](#)




-  Community
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life

-  Favourites
-  System Management
-  Online Help

Contact Search


 Add








 Search 




Order By: 

Searches:
Display Name of contact, Electronic Address,
Generated Contact ID, System ID

[Previous Page](#)




-  Community
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life



-  Favourites
-  System Management
-  Online Help

Contact Search

 Add

 Search  Showing 1 to 2 of 2

Order By: 

Canon, Sarah (Sarah) Generated Contact ID: 241000028 SSN: IDs: Grading ID: 485108 Employee ID: 0123456	 Primary Address: 123 Fake Street Ottawa A1A1A1 Aruba	Phone Number: 6136136133	Emergency Contact: No Emergency Contact
Canon, Sarah (Sarah) Generated Contact ID: 50000001 SSN: IDs:	 Primary Address: test Ottawa MB K1V9W6 Canada	Phone Number: No Phone	Emergency Contact: No Emergency Contact

[Previous Page](#)

- Community
- Admissions
- Academic
- Communication
- Billing
- Financial Aid
- Student Life
- Favourites
- System Management
- Online Help

Contact Search

Add

Find... Search Showing 1 to 2 of 2 Order By:

Last Name	First Name	Middle Name	SIN
<input type="text" value="Canon"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
SSN	Preferred Name		
<input type="text"/>	<input type="text"/>		
Generated Contact ID	System ID		
<input type="text"/>	<input type="text"/>		
Type	Identifier		
<input type="text"/>	<input type="text"/>		
Previous First Name	Previous Last Name	Category for Name Change	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Contains

Reset Search

[Previous Page](#)

Search Menu

Community

Admissions

Academic

Communication

Billing

Financial Aid

Student Life

Favourites

System Management

Online Help

Contact Search

Add

Find... Search Showing 1 to 2 of 2

Order By: Last Name

Canon, Sarah (Sarah) Generated Contact ID: 241000028 SSN: IDs: Grading ID: 485108 Employee ID: 0123456	Primary Address: 123 Fake Street Ottawa A1A1A1 Aruba	Phone Number: 6136136133	Emergency Contact: No Emergency Contact
Canon, Sarah (Sarah) Generated Contact ID: 50000001 SSN: IDs:	Primary Address: test Ottawa MB K1V9W6 Canada	Phone Number: No Phone	Emergency Contact: No Emergency Contact

[Previous Page](#)

- Community
- Admissions
- Academic
- Communication
- Billing
- Financial Aid
- Student Life
- Context Menu
- Favourites
- System Management
- Online Help

Canon, Sarah (Sarah) Obsolete Save

Generated Contact ID: 241000028 System ID: 2751 Birth Date: 1978-01-04 (Age 44 yrs)

Contact Information

First Name: Sarah	Obsolete: No	Preferred Name:
Middle Name:	SSN:	Show On Directory: Yes
Last Name: Canon	ITN:	Do Not Contact: No
Disabilities:	SIN:	
	Gender: Non-binary	
	Suffix:	

Addresses

Address	Effective From	Effective To	Do Not Contact	Type	Associations	Actions
123 Fake Street Ottawa A1A1A1 Aruba	2022-02-25		No		Primary	
234 Fake Street Ottawa ON K1K1K1 Canada	2022-01-06		No	Mailing	Permanent	
456 Fake Street						

- Section Manager
- Contact
 - Addresses
 - Phone Numbers
 - Electronic Addresses
 - Notes
 - Interests
 - Pictures
 - Relationships
 - Greetings
 - Demographic Data
 - Citizenships

Context Menu

◀ Previous Page

🔍 Search Menu ✕

- 👤 Community
- 📅 Admissions
- 🎓 Academic
- 🗨️ Communication
- 📄 Billing
- 💰 Financial Aid
- 📖 Student Life
- ☰ Context Menu**
- ❤️ Favourites
- ⚙️ System Management
- 🔗 Online Help

Academic Progress

- Holds
- Alerts
- Student Degree Audit

Registration

- Registration

Student Record

- Student
- Student Health Record
- Student Course Enrolment
- Student Academic Record
- Person Academic Goal
- Student Transcript Report
- Student Transfer Courses

Applicant Management

- Admissions Record
- View Communications
- View Interaction Plans
- Academic Program Intake

Account Management

- Financial Account
- Holds
- Alerts

Bursar

- Payment Plans

Community

- Person

Student Process

- Holds

Terms & Conditions

- Exposed T&C

Financial Aid

- Financial Aid Record
- Package

Documents Management

- Document Repository
- Financial Aid Document Repository

Housing

- Room Record
- Building Record

System Management

- Membership Users

Manager 🔧

Members

Addresses

Tips

Historic Data

Jobs

[Previous Page](#)[Community](#)[Admissions](#)[Academ](#)[Commu](#)[Billing](#)[Financia](#)[Student](#)[Context Menu](#)[Favourites](#)[System Management](#)[Online Help](#)

Canon, Sarah (Sarah)

Generated Contact ID: 241000028 System ID: 2751 Birth Date: 1978-01-04 (Age 44 yrs)

 Contact Information

Section Manager

 Contact Addresses Phone Numbers

? Select Student Academic Record

Canon, Sarah (Sarah) [164]

Academic Level	Status	Goal	Program	Start Period	Start Date
Post-Secondary	Accepted for Enrollment	Diploma in Photography	Photography - Published - Ver. 2.6		

123 Fake Street Ottawa A1A1A1 Aruba	2022-02-25	No	Primary	
---	------------	----	---------	--

234 Fake Street Ottawa ON K1K1K1 Canada	2022-01-06	No	Mailing Permanent	
---	------------	----	-------------------	--

456 Fake Street

[Previous Page](#)

- Community
- Admissions
- Academic
- Communication
- Billing
- Financial Aid
- Student Life
- Context Menu
- Favourites
- System Management
- Online Help

Canon, Sarah (Sarah) Delete Save

Student: Canon, Sarah (Sarah) Generated Contact ID: 241000028 Edit
 Student Academic Record ID: 241000028-100018

Academic Level: Post-Secondary Expected Start Date: Price Type: Domestic
 Status: Accepted for Enrollment Start Date: Student Category:
 Enrolment Status: Enrolled

Goals Add

Goal	Program	Program Curriculum	Standing	Academic Advisor	Faculty Advisor	Averages	Status	Actions
Diploma in Photography	Photography - Published - Ver. 2.6	Photography - Published - Ver. 9.0						

Averages

Grade Effect Type	Cumulative Average	Grade Points	Attempted Hours	Earned Hours	Hours to Average
Transcript	3.3	138.6	42	42	42

Section Manager

- Goals
- Averages
- Enrollment
- Exposed T&C
- Academic Progress
- Alternative Awards
- Academic Achievements
- Document Repository
- Placement
- Activities
- Accessibility Needs

[Previous Page](#)

- Community
- Admissions
- Academic
- Communication
- Billing
- Financial Aid
- Student Life
- Context Menu
- Favourites
- System Management
- Online Help

Canon, Sarah (Sarah) Delete Save

Student: Canon, Sarah (Sarah) Generated Contact ID: 241000028 Edit
 Student Academic Record ID: 241000028-100018

Academic Level: Post-Secondary Expected Start Date: Price Type: Domestic
 Status: Accepted for Enrollment Start Date: Student Category:
 Enrolment Status: Enrolled

Enrolment Add

Period	Start Date	Enrolment Type	Enrolment Status	Enrolment Standing	Enrolment Level	Student Group	Load	Period Cumulative Average	Att Crd Ho
2022W	2022-01-10	Registration	Enrolled				Part Time	0	
2021F	2021-09-06	Registration	Enrolled				Part Time	3.30	42

Exposed T&C

Document Title	Context	Process	Required Paragraphs	Total Paragraphs	Paragraphs	Actions

- Section Manager
- Goals
 - Averages
 - Enrollment
 - Exposed T&C
 - Academic Progress
 - Alternative Awards
 - Academic Achievements
 - Document Repository
 - Placement
 - Activities
 - Accessibility Needs

[Previous Page](#)

- Community
- Admissions
- Academic
- Communication
- Billing
- Financial Aid
- Student Life
- Context Menu
- Favourites
- System Management
- Online Help

Canon, Sarah (Sarah) Obsolete Save

Generated Contact ID: 241000028 System ID: 2751 Birth Date: 1978-01-04 (Age 44 yrs)

Contact Information Edit

First Name: Sarah	Obsolete: No	Preferred Name:
Middle Name:	SSN:	Show On Directory: Yes
Last Name: Canon	ITN:	Do Not Contact: No
Disabilities:	SIN:	
	Gender: Non-binary	
	Suffix:	

Addresses Add

Address	Effective From	Effective To	Do Not Contact	Type	Associations	Actions
123 Fake Street Ottawa A1A1A1 Aruba	2022-02-25		No		Primary	
234 Fake Street Ottawa ON K1K1K1 Canada	2022-01-06		No	Mailing	Permanent	
456 Fake Street						

- Section Manager**
- Contact
 - Addresses
 - Phone Numbers
 - Electronic Addresses
 - Notes
 - Interests
 - Pictures
 - Relationships
 - Greetings
 - Demographic Data
 - Citizenships



Previous Page

Search Menu

- Community
- Admissions
- Academic
- Communication
- Billing
- Financial Aid
- Student Life
- Context Menu
- Favourites
- System Management
- Online Help

Person/Organization Management

- College
- CRM Rank
- High School
- Organization
- Person

Staff Management

- Personnel
- Personnel Manual Synchronization

Data Analysis

- Reports

Faculty Activity Tracking

- Approved Completed Activities
- Completed Activity Approval

Navigation icons: back, search, forward, Obsolete, Save

2751 Birth Date: 1978-01-04 (Age 44 yrs)

Edit

Preferred Name:
Show On Directory: Yes
Do Not Contact: No

binary


Add








Active To	Do Not Contact	Type	Associations	Actions
	No		Primary	
	No	Mailing	Permanent	




Section Manager

- Contact
- Addresses
- Phone Numbers
- Electronic Addresses
- Notes
- Interests
- Pictures
- Relationships
- Greetings
- Demographic Data
- Citizenships


[Previous Page](#)




-  Community
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life

-  Favourites
-  System Management
-  Online Help

Contact Search

 Add

 Search 

Order By: 

Searches:
Display Name of contact, Electronic Address,
Generated Contact ID, System ID

[Previous Page](#)

- Community
- Admissions
- Academic
- Communication
- Billing
- Financial Aid
- Student Life

- Favourites
- System Management
- Online Help

Contact Search

Add

Search Showing 1 to 2 of 2

Order By:

Morris, Zack (Zack) Generated Contact ID: 0000000032 SSN: IDs: AC Student Number: 123456789	Primary Address: 1 College Way Pembroke ON K8A 0C8 Canada	Phone Number: 1-613-735-4700	Emergency Contact: John Morris (6365489845)
Morris, John Generated Contact ID: 0000000036 SSN: IDs:	Primary Address: No Primary Address	Phone Number: No Phone	Emergency Contact: No Emergency Contact

[Previous Page](#)

- Community
- Admissions
- Academic
- Communication
- Billing
- Financial Aid
- Student Life

Context Menu

Favourites

System Management

Online Help

Morris, Zack (Zack)

Obsolete Save

Generated Contact ID: 0000000032 System ID: 35 Birth Date: 2002-11-23 (Age 19 yrs)

Contact Information

	First Name: Zack	Obsolete: No	Preferred Name: Zack
	Middle Name:	SSN:	Show On Directory: No
	Last Name: Morris	ITN:	Do Not Contact: No
	Disabilities:	SIN: 999999999	
		Gender: Male	
		Suffix:	

Addresses

Address	Effective From	Effective To	Do Not Contact	Type	Associations	Actions
1 College Way Pembroke ON K8A 0C8 Canada	2020-07-01		No	Mailing	Primary	

Phone Numbers

Type	Phone	Ext	Phone	Effective	Effective	Address	Do Not	Associations	Do Not	Action

Section Manager

- Contact
- Addresses
- Phone Numbers
- Electronic Addresses
- Notes
- Interests
- Pictures
- Relationships
- Greetings
- Demographic Data
- Citizenships

Context Menu

◀ Previous Page

🔍 Search Menu ✕

👤 Community

📅 Admissions

🎓 Academic

💬 Communication

📄 Billing

💰 Financial Aid

📖 Student Life

☰ Context Menu

♥ Favourites

⚙️ System Management

❓ Online Help

Academic Progress

Holds

Alerts

Student Degree Audit

Registration

Registration

Student Record

Student

Student Health Record

Student Course Enrolment

Student Academic Record

Person Academic Goal

Student Transcript Report

Student Transfer Courses

Applicant Management

Admissions Record

View Communications

View Interaction Plans

Academic Program Intake

Account Management

Financial Account

Holds

Alerts

Bursar

Payment Plans

Community

Person

Student Process

Holds

Terms & Conditions

Exposed T&C

Financial Aid

Financial Aid Record

Package

Documents Management

Document Repository

Financial Aid Document Repository

Housing

Room Record

Building Record

System Management

Membership Users

Manager 🔧

Members

Addresses

Tips

Historic Data

Tools

Tasks 0

Messages 0

Previous Page

Morris, Zack (Zack)



Delete

Save

Section Manager

Goals

Averages

Search Menu

Community

Student: Morris, Zack (Zack) Generated Contact ID: 0000000032
Student Academic Record ID: 0000000026

Edit

Select Student Academic Record

Morris, Zack (Zack) [26]

Academic Level	Status	Goal	Program	Start Period	Start Date
Undergraduate	Matriculated	BA	Business Administration - Published - Ver. 4.4	Fall Quarter 2020 (2020-21)	
Undergraduate		BA	Business-Accounting - Published - Ver. 2.1		
Graduate	Matriculated	MBA	Master of Business Administration - Discontinued - Ver. 1.1	Spring Quarter 2021 (2020-21)	

Cancel

Averages

Grade Effect Type	Cumulative Average	Grade Points	Attempted Hours	Earned Hours	Hours to Average
Transcript	3.67	183.5	50	50	50

Placement

Activities

Accessibility Needs

Context Menu

Favourites

System Management

[Previous Page](#)

- Community
- Admissions
- Academic
- Communication
- Billing
- Financial Aid
- Student Life
- Context Menu
- Favourites
- System Management
- Online Help

Morris, Zack (Zack) Delete Save

Student: Morris, Zack (Zack) Generated Contact ID: 0000000032 Edit
 Student Academic Record ID: 0000000026

Academic Level: Undergraduate Expected Start Date: Price Type: Domestic
 Status: Matriculated Start Date: Student Category:
 Enrolment Status: Enrolled

Goals Add

Goal	Program	Program Curriculum	Standing	Academic Advisor	Faculty Advisor	Averages	Status	Actions
BA	Business Administration - Published - Ver. 4.4	Business Administration - Published - Ver. 5.1	Good	Jenkins, Todd	Thornton, William	▼	In Progress	

Averages








Grade Effect Type	Cumulative Average	Grade Points	Attempted Hours	Earned Hours	Hours to Average
Transcript	3.67	183.5	50	50	50




- Section Manager**
- Goals
 - Averages
 - Enrollment
 - Exposed T&C
 - Academic Progress
 - Alternative Awards
 - Academic Achievements
 - Document Repository
 - Placement
 - Activities
 - Accessibility Needs



[Previous Page](#)

User Board:

-  Community
-  Admissions
-  Academic
-  Communication
-  Billing
-  Financial Aid
-  Student Life

-  Favourites
-  System Management
-  Online Help