



Intra-Alliance CRM Manual

Groups and Members

Contents

Login Page	<u>3</u>
Main Page Menu	<u>4</u>
CRM Groups	<u>5</u>
CRM - Members	<u>8</u>

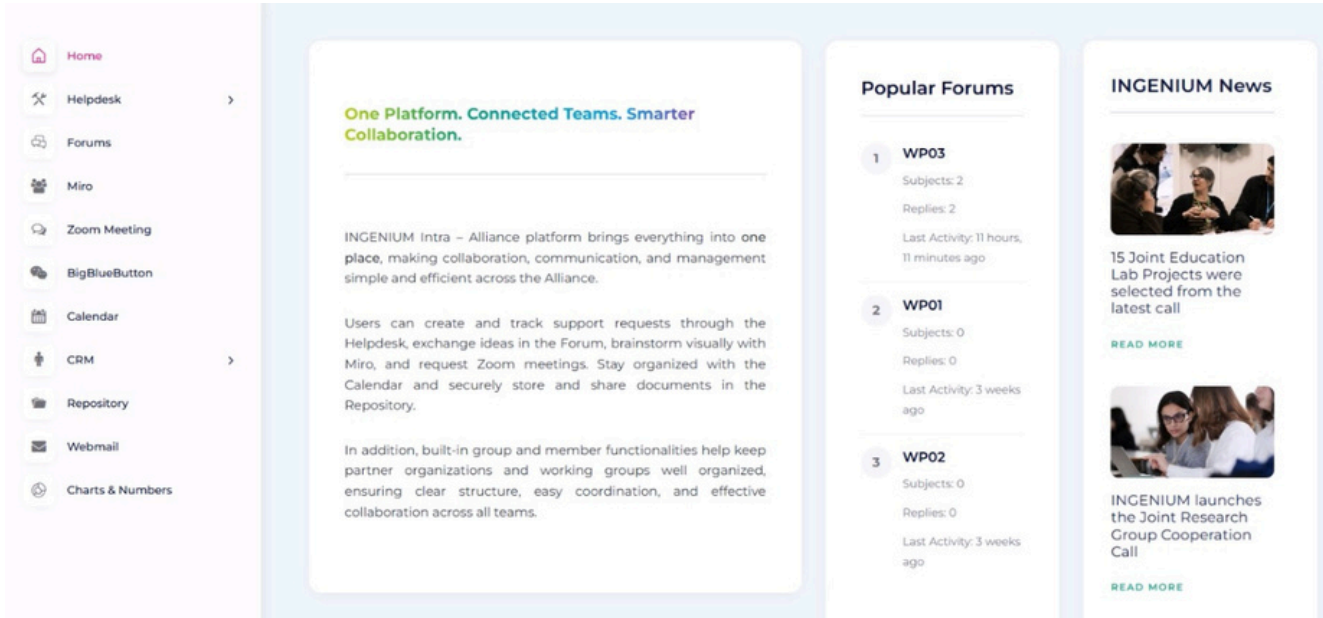
Login Page

There are two authentication methods.

(a) If Single Sign-On (SSO) integration is available, users may select their affiliated university from the provided list and proceed with authentication.

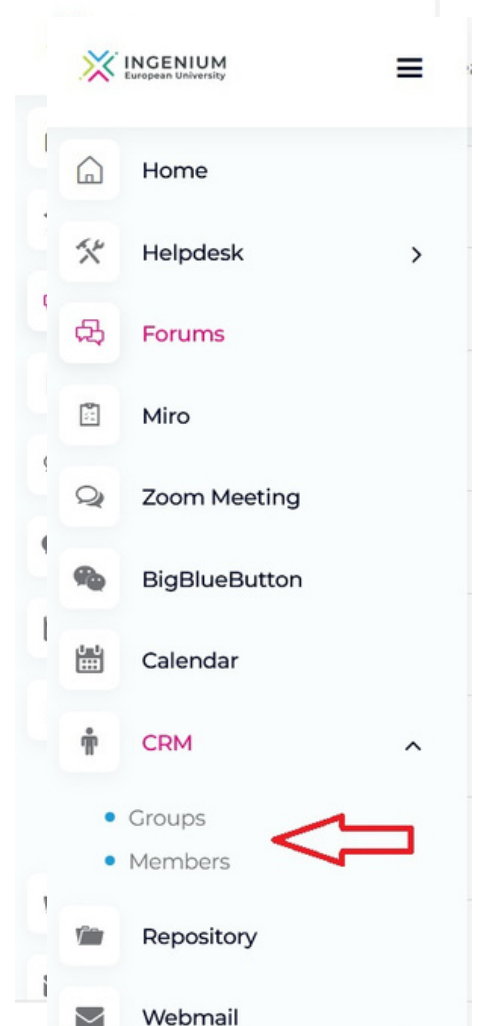
(b) Alternatively, users may log in using a local platform account. The corresponding credentials are typically provided via email. In cases where such credentials have not been received, users are advised to contact the support team in order to request access.

Main Page Menu



Accessing CRM

1. In the main page, on the **left-hand side menu**, locate and click on the **CRM arrow**.
2. Once the CRM section expands, you will see two available options:
 - o **Groups**
 - o **Members**




CRM - Groups


This page shows all groups. Use the search to find a specific group or apply filters such as most active, most members, newest, or alphabetical. You can also view the number of groups you are assigned to.

Groups

If you would like to request the creation of a new group, please complete the [form](#) to submit a ticket. Your request will be reviewed by the Helpdesk and the General Secretariat.


Search Groups...

Search Groups...  **SEARCH**

All Groups 10 **My Groups** 2 

Alphabetical

Last Active

Most Members 

Newly Created

View **Alphabetical**

CRM - Groups

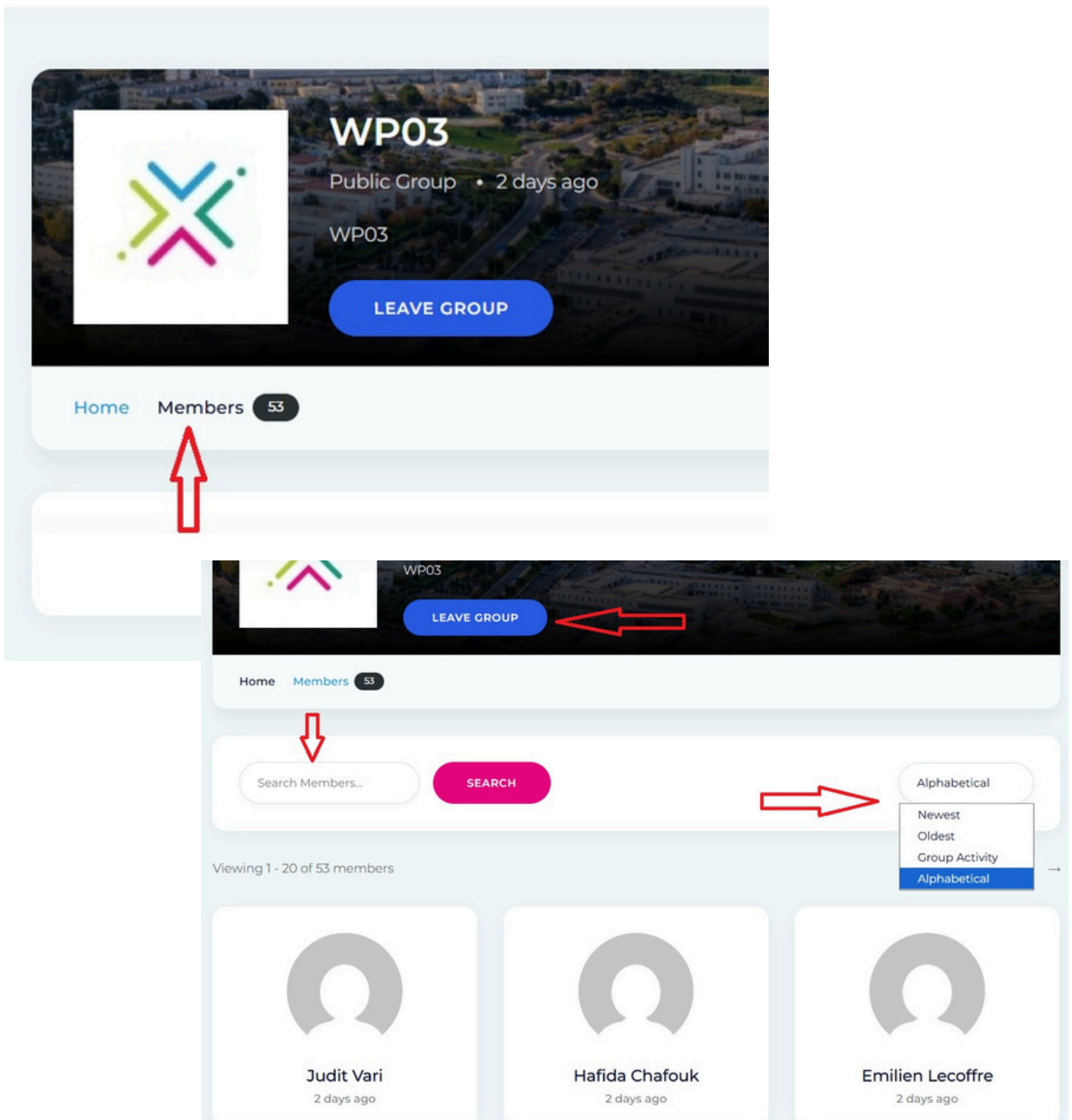
Further down, where all the groups are displayed, you can view their members, request to join a group, or request to leave a group.

The screenshot displays a grid of six group cards, each with a background image, a group icon, a name, a timestamp, and a member count. The cards are arranged in two rows of three. The first card (WP01) has a red circle around its icon and a 'Join Request' button. The second card (WP02) has a red arrow pointing up to its 'Join Request' button. The third card (WP03) has a red circle around the number '53' in its member count and a 'Leave Group' button. The other cards (WP04, WP05, WP06) have 'Join Request' buttons.

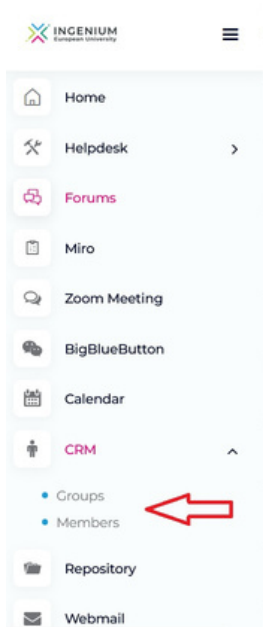
Group ID	Member Count	Action
WP01	52	Join Request
WP02	55	Join Request
WP03	53	Leave Group
WP04	56	Join Request
WP05	60	Join Request
WP06	49	Join Request

CRM - Groups

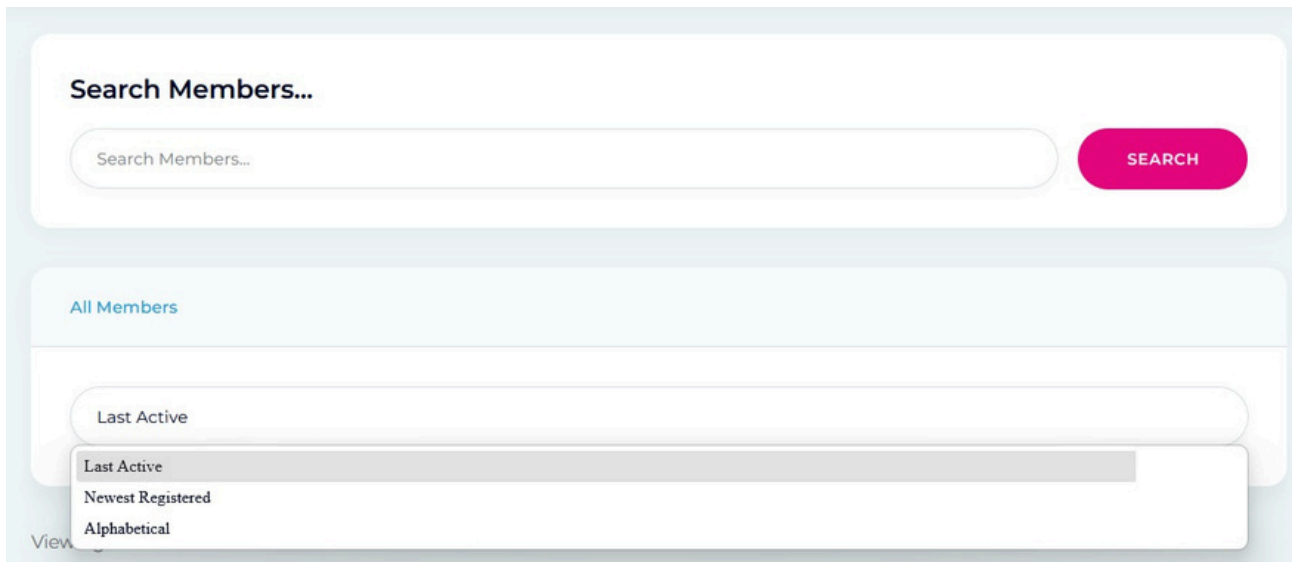
By selecting a group and then clicking 'Members,' you will be taken to the group's members page. Here, you can search for a specific member or sort the list alphabetically, by newest or oldest members, or by the group's activity.



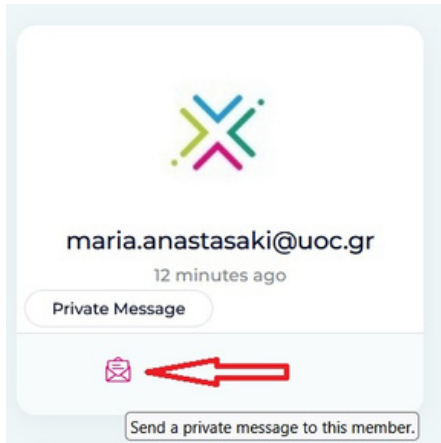
CRM - Members



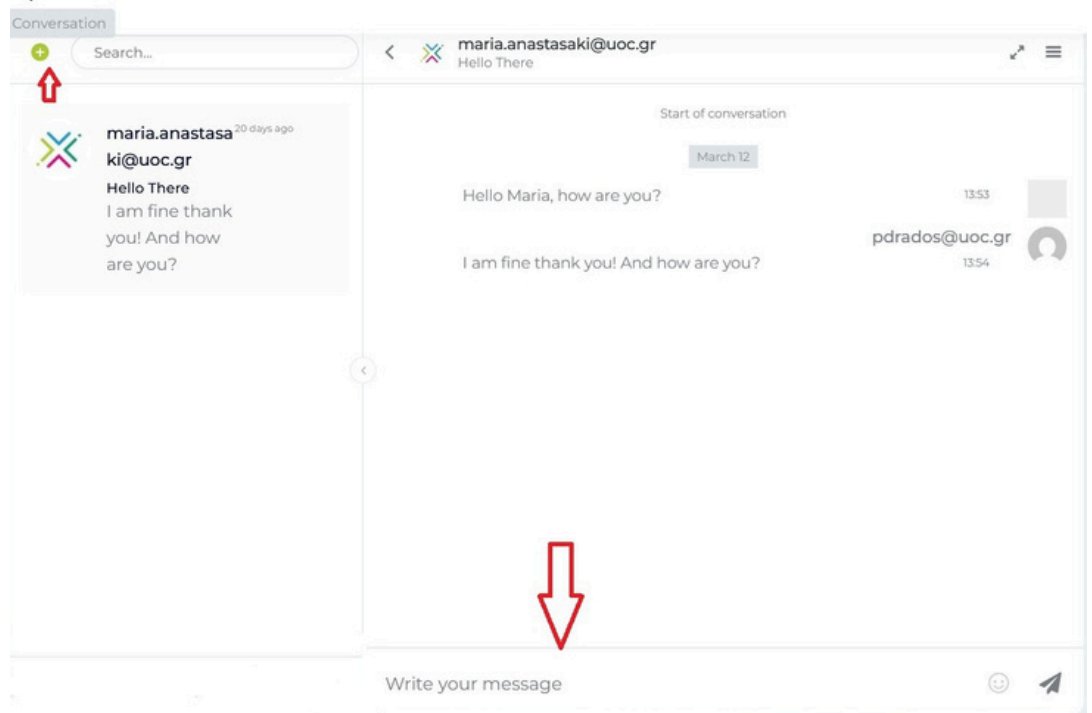
Navigate to CRM and select 'Members' from the main menu to view individual members. In this section, you can filter members alphabetically or search for a specific user. Selecting a member displays additional information, including their participation in Working Packages, and provides the option to send a private message.



CRM - Members



Selecting a member displays additional information, including their participation in Working Packages, and provides the option to send a private message.



Members may respond to a message or initiate a new conversation with any other member by selecting the '+' button.

CRM - Members

After logging in, users can collapse the navigation menu by clicking the menu toggle button. Messages are accessible via the messages icon, and notifications can be viewed by clicking the bell icon.




When you select your username and go to 'My Profile,' you can manage your personal settings, including updating your name, profile picture, and cover image. To log out, you select your username and choose the 'Logout' option.



Support

If you have any questions about INGENIUM Intra-Alliance, please contact us at:

helpdesk@ingenium-university.eu 



ingenium-university.eu/intra-alliance 