Advisor CRM QuickStart Guide

1 Connect Outlook

Connect the CRM to Outlook to see all of your appointments with students in one place. See the CRM Guide: “Connecting Outlook” for more info.

2 Set up Availability

Set your schedule in the CRM so students know when they can schedule meetings with you. See the CRM Guide: “Appointment Scheduling” for more info.

3 Students Schedule Appointments

Students will schedule appointments with you in MyMadison Connect. The appointment will be added to your Outlook calendar. See the CRM Guide: “MyMadison Connect” for more info.

4 Meet With Students

If you want to familiarize yourself with a student prior to meeting with them. See the CRM Guide: “Viewing Student Accounts” for more info.

5 Document Meeting

After the meeting, close the appointment and add any notes or relevant files to the appointment. See the CRM Guide: “Appointment Closure” for more info.