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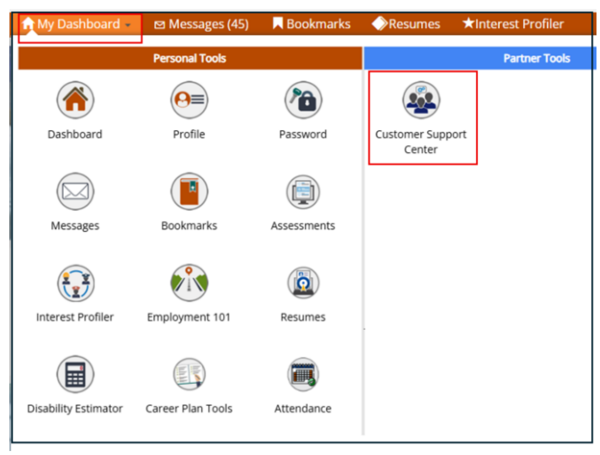
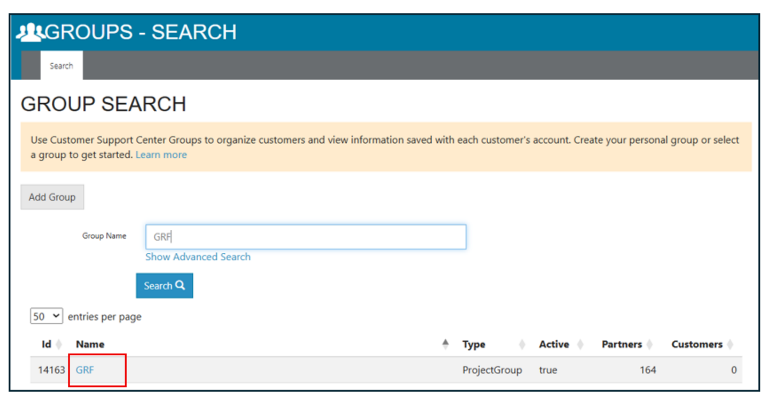
Overview

The Customer Information tab allows users to manage all customers assigned to a grantee in one centralized location. Within this tab, users can view existing customer records, add new customers individually, ***upload multiple customers in bulk via file import***, and edit customer details as needed. Users can also search and filter customer data.

Access the Customer Information Tab

1. Log in to www.illinoisworknet.com
2. Select My Dashboard
3. Select Customer Support Center in the Partner Tools.
4. Select GRF on the Group Search.





Search for a customer

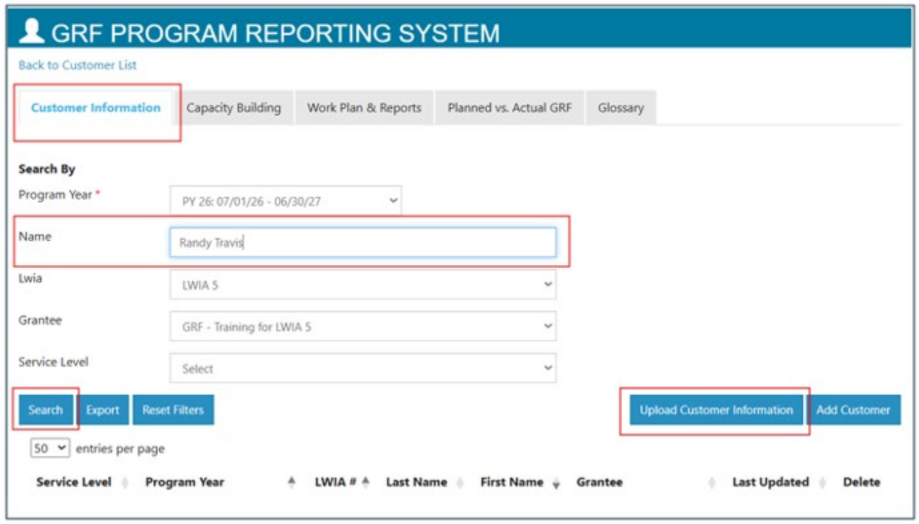
The first step before adding a customer is to determine if the customer is already in the system. **<u>You cannot skip this step.</u>** Before adding a customer, you must search within the system to check if they already exist. Do not create a duplicate. This may cause reporting errors.

1. On the Customer Information tab, type the customer's First Name, Last Name, or both in the Name field.

2. Click Search

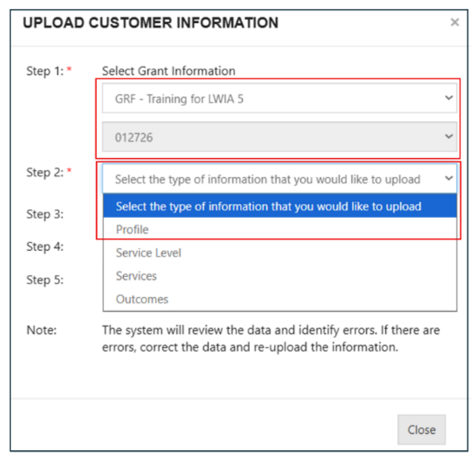
3. If the customer is found, click the customer's last name to open the Progress page.

4. If the customer is not found and you need to **<u>add more than one customer</u>**, click Upload Customer Information



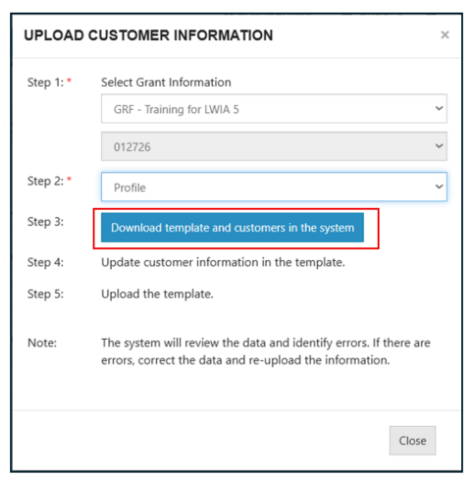
5. On the Upload Customer Information modal, the Grant Information will prefill in the first two boxes.

6. Select Profile from the *type of information that you would like to upload* field.



8. A blue download template box will be provided.

7. Click Download template and customers in the system to open the file.

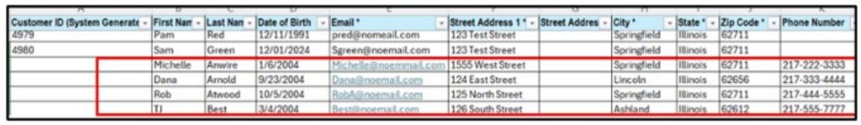


Download template

1. An Excel file will open with columns to be completed with customer information.

2. Current customer information will be shown in the top section of the file. This information can be deleted from the file. Deleting this information will quicken the upload time.

3. Scroll down to the bottom of the list to enter the new customer information.

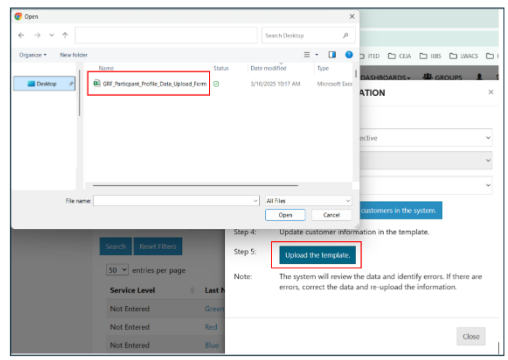


Customer ID (System Generate	First Nam	Last Nan	Date of Birth	Email *	Street Address 1 *	Street Addres	City *	State *	Zip Code *	Phone Number
4979	Pam	Red	12/11/1991	pred@nomeail.com	123 Test Street		Springfield	Illinois	62711	
4980	Sam	Green	12/01/2024	Sgreen@noemail.com	123 Test Street		Springfield	Illinois	62711	
	Michelle	Anwire	1/6/2004	Michelle@noemmail.com	1555 West Street		Springfield	Illinois	62711	217-222-3333
	Dana	Arnold	9/23/2004	Dana@noemail.com	124 East Street		Lincoln	Illinois	62656	217-333-4444
	Rob	Atwood	10/5/2004	RobA@noemail.com	125 North Street		Springfield	Illinois	62711	217-444-5555
	TJ	Best	3/4/2004	Best@noemail.com	126 South Street		Ashland	Illinois	62612	217-555-7777

4. The new customer information being entered will not have a Customer ID yet because their information has not been uploaded to the system.

5. ***Each informational box of the spreadsheet must be completed for the file to upload correctly.*** If you leave a box blank, the system will display a missing information error message and prompt you to open the file, fix it, and re-upload it.

6. Save the spreadsheet to your desktop. **Do not change the name of the spreadsheet,** or it will not upload properly.

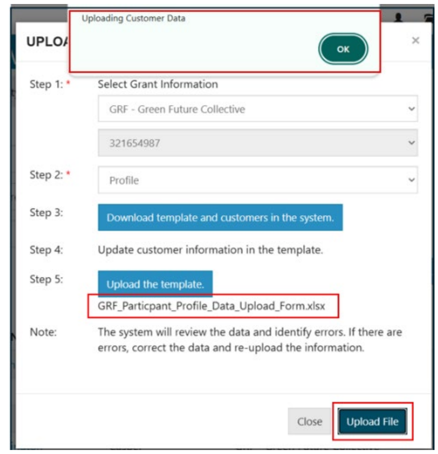


7. Click Upload the template and select the file from your desktop.

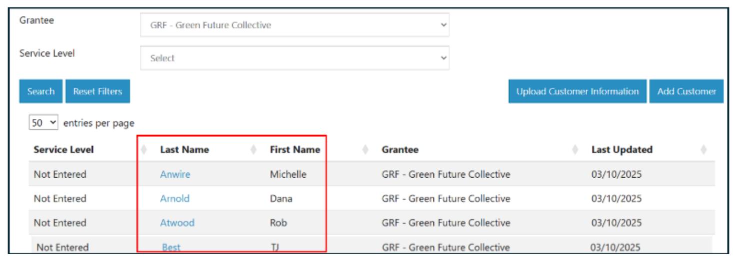
8. The file name will show under the upload button.

9. Click Upload File.

10. A confirmation of the upload message will be presented.



11. The new customers will now show in your customer list.



12. The upload file can also be used to upload the other categories of information for customers:
    - Service Level
    - Services
    - Outcomes

13. The upload file can also be used as an export with customer information.