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Overview

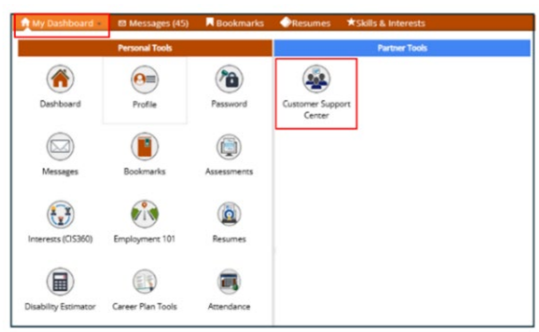
The Customer Information tab allows users to view, add, upload, and edit customers assigned to a grantee. The customer application can be completed by the customer and then manually added by someone with your agency.

Who Enters/Maintains Data

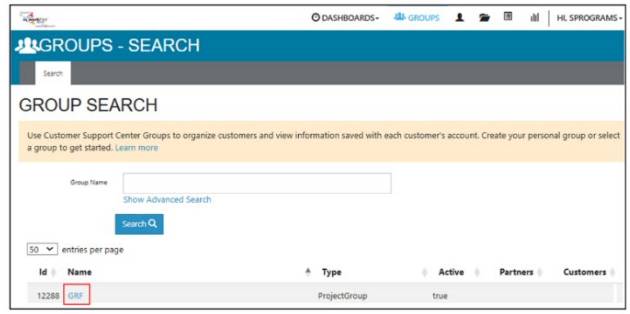
Grantee staff associated with an agency/program in the Illinois workNet system can view, add, and edit customers.

Access Customer Group

1. Log in to www.illinoisworknet.com
2. Select My Dashboard.
3. Select Customer Support Center in the Partner Tools.

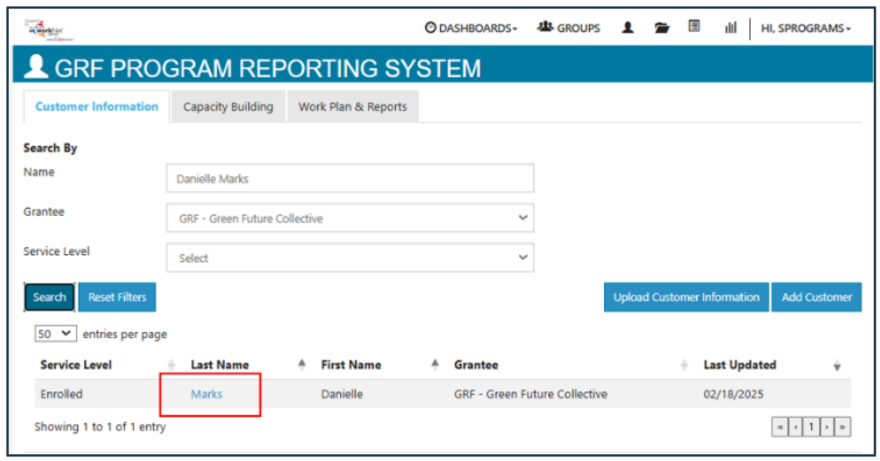


4. Select GRF on the Group Search.



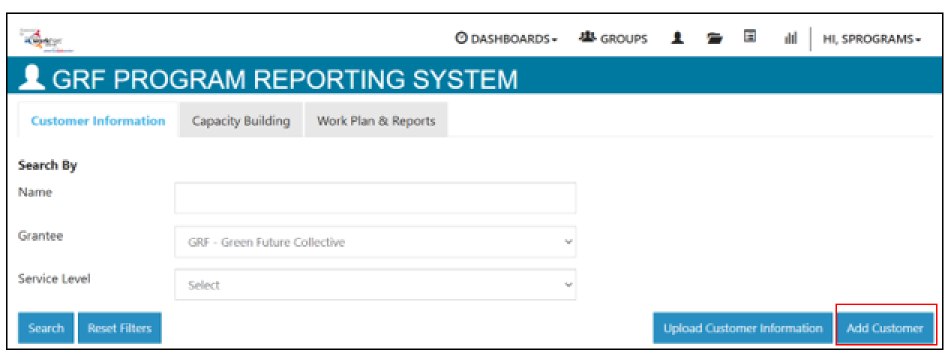
Search for a customer

1. Search for a customer by entering:
    a. Customer's Name
    b. Click Search
    c. If the customer is found, click the customer's last name to open the Progress page.

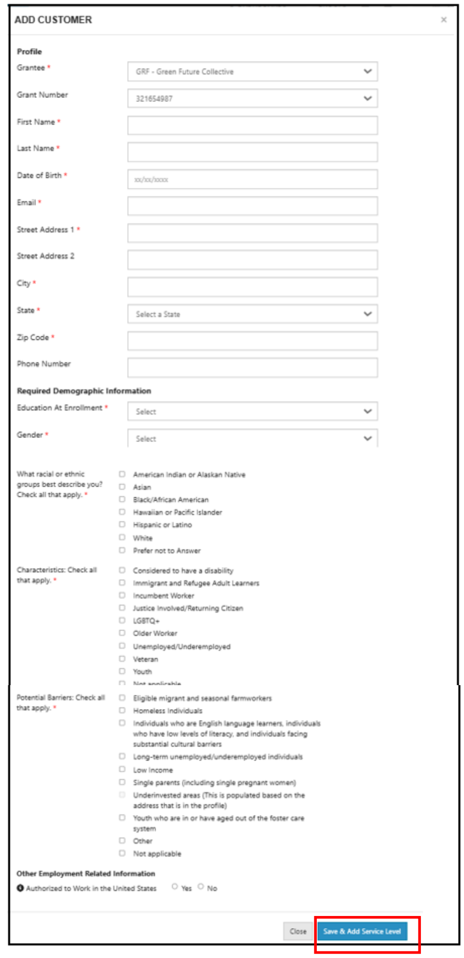


Add a Customer

1. Click Add Customer

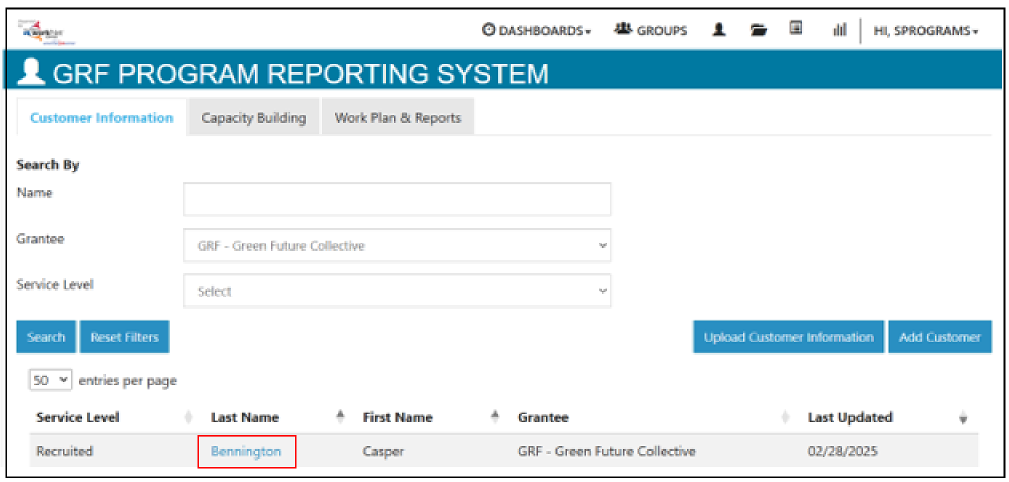


2. Complete the required information to add the customer.
3. Click Save and Add Service level.



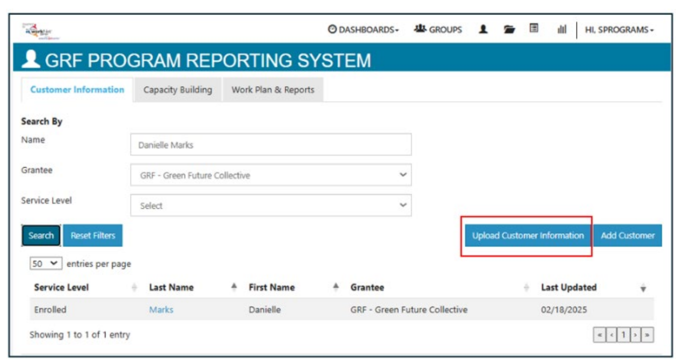
4. A username and password will be created for the customer. Be sure to provide these details to the customer so they can log into the system.
5. Click Add Service Level.

6. On the Add Service Level modal, select a level:
   a. Recruited
   b. Enrolled
   c. Referred
7. Enter the Date
8. Click Save
9. A confirmation message will appear, *Service Level Added*
10. Click Ok
11. The service level will appear in the grey Service Level box.
12. Click Close
13. Click on the customer's last name to open the customer progress page.

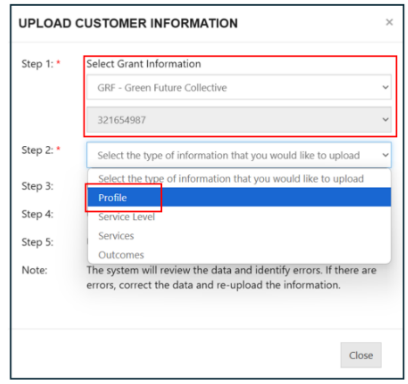


Upload Customer Information

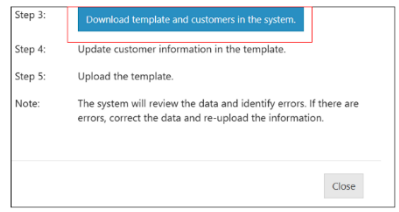
1. On the Customer Information tab, click Upload Customer Information.



2. On the Upload Customer Information modal, the Grant Information will prefill in the first two boxes.
3. Select Profile from the type of information that you would like to upload.

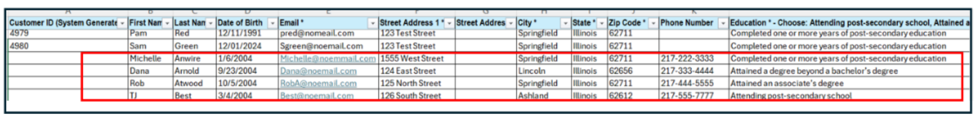


4. A blue download template box will be provided.
5. Click Download template and cutomers in the system to open the file.



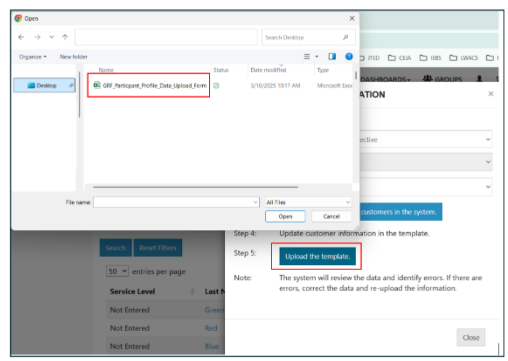
Download template

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

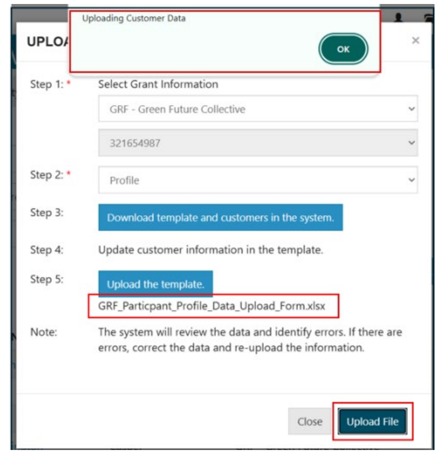


Customer ID (System Generate	First Nam	Last Nan	Date of Birth	Email *	Street Address 1 *	Street Addres	City *	State *	Zip Code *	Phone Number	Education * - Choose: Attending post-secondary school, Attained a
4979	Pam	Red	12/11/1991	pred@nomeail.com	123 Test Street		Springfield	Illinois	62711		Completed one or more years of post-secondary education
4980	Sam	Green	12/01/2024	Sgreen@noemail.com	123 Test Street		Springfield	Illinois	62711		Completed one or more years of post-secondary education
	Michelle	Anwire	1/6/2004	Michelle@noemmail.com	1555 West Street		Springfield	Illinois	62711	217-222-3333	Completed one or more years of post-secondary education
	Dana	Arnold	9/23/2004	Dana@noemail.com	124 East Street		Lincoln	Illinois	62656	217-333-4444	Attained a degree beyond a bachelor's degree
	Rob	Atwood	10/5/2004	RobA@noemail.com	125 North Street		Springfield	Illinois	62711	217-444-5555	Attained an associate's degree
	TJ	Best	3/4/2004	Best@noemail.com	126 South Street		Ashland	Illinois	62612	217-555-7777	Attending post-secondary school

2. Current customer information will show 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.
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 give you a missing information error message and will make you go into the file to fix it and then re-upload again.
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:
    a. Service Level
    b. Services
    c. Outcomes
13. The upload file can also be used as an export with customer information.