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Overview

The Customer Information tab allows users to view, add, upload, and edit customers assigned to a grantee. The <u>customer application</u> 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.

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Search					
GROUP SEARCH					
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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.

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Grantee	GRF - Green Future Co	ollective		•				
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Service Level	+ Last Name	+ First Name	+ Grantee			+	Last Updated	÷ ÷
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Add a Customer

1. Click Add Customer

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- 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.

ADD CUSTOMER	
WN ACCOUNT STATUS	
Username: CBennington	
Password: Bennington030404	
Status: New Account Created	
	Close 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.

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Recruited	Bennington	Casper	GRF - Green F	uture Collective		02	/28/2025	

Upload Customer Information

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

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- 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.

5. Click Download template and cutomers in the system to open the file.

4. A blue download template box will be provided.

UPLOAD	CUSTOMER INFORMATION ×
Step 1: *	Select Grant Information
step 1.	GRF - Green Future Collective
	321654987 🗸
Step 2: *	Select the type of information that you would like to upload 🛛 🗸
Step 3:	Select the type of information that you would like to upload
Step 4:	Service Level
Step 5:	Services Outcomes
Note:	The system will review the data and identify errors. If there are errors, correct the data and re-upload the information.
	Close

 Step 3:
 Download template and customers in the system.

 Step 4:
 Update customer information in the template.

 Step 5:
 Upload the template.

 Note:
 The system will review the data and identify errors. If there are errors, correct the data and re-upload the information.

 Close
 Close

Download template

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

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Step 1:	Select Grant Information
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Step 2: *	Profile
Step 3:	Download template and customers in the system.
Step 4:	Update customer information in the template.
Step 5:	Upload the template.
	GRF_Particpant_Profile_Data_Upload_Form.xlsx
Note:	The system will review the data and identify errors. If there are errors, correct the data and re-upload the information.
	Close Upload File

- 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.

Grantee

GRF - Green Future Collective

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Not Entered		Arnold		Dana		GRF - Green Future Collective		03/10/2025	
Not Entered		Atwood		Rob		GRF - Green Future Collective		03/10/2025	
Not Entered		Best		TJ		GRF - Green Future Collective		03/10/2025	