Customer Support Center Add Customers and Partners March 2019 v7



About Customer Support Center

Customer Support Center is a set of free tools available to all Illinois workNet partners. Partners use these tools to provide guidance to help their customers reach their career, training, and employment goals.

Types of Access to Customer Groups/Lists

- General/Invitation/Personal Available to all Illinois workNet partners. Use the invitation process to add
 customers and partners to this group. If you use this type of group, you will only have one group to hold all
 invited customers. You can use subgroups to organize the customers.
- IWDS Access Only available to Local Workforce Innovation Area (LWIA) staff who have access to IWDS. Customers and partners are automatically added to this group based on the IWDS status and IWDS role.
- Special Programs Available to approved Illinois workNet partners who are working on the special program. Customers typically complete an application or are added to the system by program staff. Partners are added to these groups by state level Illinois workNet staff.

Tools/Features Include:

- Illinois workNet Career Plan
- Assessment Results and Certificates
- Employment 101 Assessment Scores and Plans
- Password Recovery/Update
- Saved Optimal Resume Items (Resumes, Letters, Portfolios, Assessments, and more)
- Message Tool to Communicate Directly with Customers
- Note: Special Programs Have Additional Program Specific Features (Scheduling Tools, Worksite Placement, Intake/Enrolled Dashboards, Special Reports, Plans, etc.)

How to Get to Your Customer Support Center

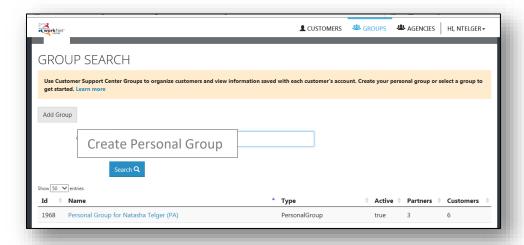
1. Login to your Illinois workNet account. Select My Dashboard and select Customer Support Center.



- 2. You will see a list of groups that you can access. Select a group.
- 3. If you do not have a group, or you have not started your personal group, you will see a button to **Create Personal Group**. Once you create your personal group, that button will go away.







Add Customers to Personal Groups

1. Select your personal group and select the **Invite Others** tab.



- 2. Select the **Invite Others** tab. The group invitation will default to open. This is the recommended approach, if you are going to invite multiple people in a short time period.
- 3. Create the group invitation.
 - a. Enter your pass code.
 - i. The pass code must be 5-25 characters long.
 - ii. It is not case sensitive, but it must be unique.
 - iii. It is active for seven days. After seven days it cannot be used again.
 - b. Enter a title for your group invitation. Customers will see the description when they are asked to accept or deny the invitation. You can add to the description, but do not edit the main content.
 - c. Select Create Invitation button.
- 4. Select the option (bottom of page) to print the business card handout with your passcode and access instructions.
 - a. Pass them out to your customers during your workshop/class.
 - b. Email the instructions to a group of customers.

	Join A Customer Group
Go to https://www.illinoisworknet.com Log in or set up an account	n/Invite
Username: Password:	
 Enter Passcode: Chelsea Jones Group Accept the invitation 	p
Illin	on worklet Centers are an Equal Opportunity Implayer/Program. Auxiliary sids and services are available upon request to individuals with disabilities. Spinioured by the films Organizated of Commerce and Lummin Opportunity.

Only adding a couple of people and you know their email addresses? Use the individual invitation.

- 1. Select the Invite Others tab.
- 2. Select Customer Invitation.

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- 3. Enter the customer's email address and submit. An email will be sent to the customer. Note: You cannot customize the message.
- 4. Repeat for each customer.

Email Invitation Sent to Customers/Partners.

PLEASE ACCEPT THIS INVITATION TO JOIN MY ILLINOIS WORKNET® CUSTOMER GROUP MEMBER BENEFITS FOR THIS FREE SERVICE

Joining the group will allow a team of Illinois workNet career advisors to provide feedback on:

- Illinois workNet assessments
- Career and job search plans
- Offer next steps to help you meet your career, training, and employment goals

PROTECTING YOUR INFORMATION IS IMPORTANT

This is a free service offered by Illinois workNet partners and your information is protected. View the Illinois workNet <u>privacy policy</u> and <u>terms and conditions</u> for full details. Learn more about Illinois workNet by going to <u>about us</u>.

Let Me Know If You Want To Join

Click on the following link to navigate to a page on Illinois workNet to accept or deny this invitation:

Click here to login to your Illinois workNet account and navigate to the invitation page.

Or copy all of the following address and paste it into the address line of your internet browser:

https://www.illinoisworknet.com/Invite?Guid=55bb6e57-4ceb-4857-96c2-5df82cb4af12

My Contact Information

(your name)

(your organization)

Phone: (your phone number)

E-mail: (your email)

(your name) sent this e-mail using the Illinois workNet system. Please reply to (your name) (E-mail: your email) instead

of this email.

When the customer selects the link from the email, and if they are not logged into Illinois workNet, they see this:



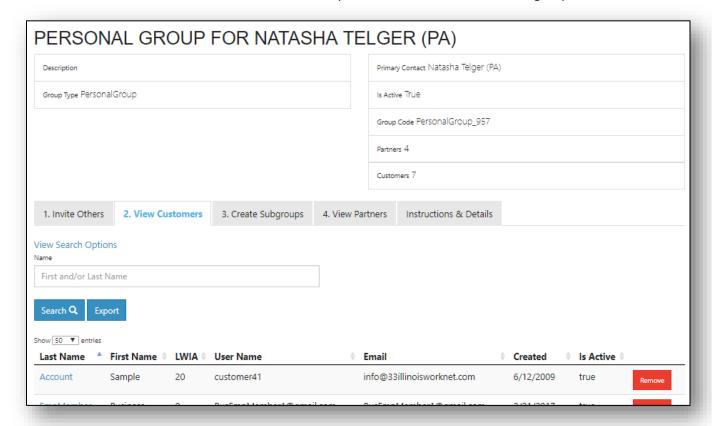
Once the customer logs in, they are prompted to either accept or deny the invitation.



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Access Customers and Partners

- Once you have selected a group, select the **View Customers** tab to view customers. Select the customer's link to view the customer information.
- Select the View Partners tab to view the list of partners that have access to this group.



Use Subgroups to Organize Customers

- 1. Select Create Subgroup. Create subgroups that align with your workflow (i.e. program, customer type, etc.).
 - Enter a meaningful title.
 - Enter a description that is brief but accurately describes the customers who are in the subgroup.
- 2. Select the subgroup to start adding customers to that subgroup.
 - a. Select the **Add Customer** button. You will only be able to search for customers that have been added to your personal group.
 - b. Partners that have access to your personal group automatically have access to the subgroups.
- 3. Select the details page to view/edit the group name or description.

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