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# Interactions
# for Student Recruitment

## USER GUIDE

### Information

**Interactions for Student Recruitment** is a solution for recruiting top prospects to your college or university.

Built on the Salesforce platform, Interactions allows you to track prospective students through all stages of the application process. Interactions also ties recruitment information to Contact and Lead data, simplifying application pipeline management so you can focus recruiting efforts on the most promising prospects.

Developed by the University of Miami with funding from Salesforce.org, we are proud to offer this free, open-source solution to the higher education community.

# Contents

# Audience

While this User Guide contains step-by-step instructions intended for end users, it is intended equally for System Administrators to learn about use cases and best practices for Interactions for Student Recruitment. Before you proceed to the Installation and Configuration Guide, we recommend that you review this User Guide first.

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# What is Interactions for Student Recruitment?

Interactions for Student Recruitment is a kit for implementing a recruitment solution for universities by using Salesforce. The kit includes an unmanaged package (the Interactions Package), resource documents (such as this guide), and much more. This guide shows you the best practices of how to use the Interactions Package along with the Higher Education Data Architecture (HEDA) to match the right student with your university.

If you are not familiar with HEDA, we recommend completing the Manage Your Higher ED Data with HEDA trail in Trailhead before proceeding.

# Why Use Interactions?

Emily is a recruiter for Graduate Business programs at Connected University (CU) where Salesforce is used to help recruit prospective students and manage their data. Emily manages recruiting for the Executive MBA program, which receives numerous requests for more information via phone, web submission, office visits, and more on a daily basis.

Since her administrators installed the Interactions Package, Emily has been better able to manage her prospective students' data.

She can now:

- Quickly create and update records across multiple objects in Salesforce with much fewer clicks
- Identify prospects with the most interest in her program
- Track each prospect's stage in the application process
- View current and historical academic interest information for a prospect from a single record

All these features give her the ability to streamline her marketing efforts toward potential students who are a good fit for her program and are most likely to apply and enroll, if admitted. So, what makes the Interactions Package so powerful for Emily and the other recruiters at Connected University?

You guessed it, Interactions!

# Why Use Interactions? (cont.)

Interactions is a custom object that is the centerpiece of the Interactions Package. Whether it’s coming to campus for a tour, requesting information online, or calling the office of admissions, Interaction records provide a log of every point of contact a prospective student has had with your university.

But that’s not all! These records come equipped with powerful code designed to make the recruiters’ (and administrators’) jobs easier and more efficient.

# Overview of the Interactions Package

Out-of-the-box, the Interactions Package leverages the Higher Education Data Architecture (HEDA) as well as standard Salesforce functionality and a few custom objects. The Interactions custom object serves as a staging table that automates the matching and creation of records for student recruitment.

Whether Interaction records are created through an integration or manually, the results are the same: existing Leads and Contacts will be matched to prevent duplicates, Opportunity and other related records are created or updated, and all the Interactions become a historical log on the prospective student’s record of their contact with the university.

Before we delve deeper into exactly how the Interactions Package functions, let’s define some of the standard Salesforce and HEDA objects in terms of recruitment as well as the custom objects included in the package.

# Overview of the Interactions Package (cont.)

| TYPE OF OBJECT | OBJECT NAME | RECRUITMENT DEFINITION |
|---|---|---|
| SALESFORCE STANDARD | Leads | A Lead represents a name from a purchased list. In other words, these are names of students that have not directly reached out to the university but whose names were gathered for marketing purposes. Each Lead represents a potential, marketable student. If your institution only uses Contacts and forgoes the use of Leads, don't fret! It's not a requirement to use Leads. |
| | Contacts | A Contact primarily represents a prospective student that has directly reached out to the university in some way. This could be by filling out a web form, attending an event, calling the admissions office or any other form of contact. Each of these points of contact could be recorded as an Interaction. Check with your administrator to learn exactly what type of contact or communication merits an Interaction in your instance. Note that Contacts can also be high school college advisors, employees at other organizations, or other persons that are important to your institution. |
| | Opportunities | Opportunities represent a single, potential (or actual) application a student has for your university. Depending on your business processes, a Contact may have a single application (Opportunity) for a given term (regardless of their academic interest(s)) or multiple applications (i.e. one for each academic interest) for the same term. We'll get more into Opportunities later, but the important thing to remember is that the Opportunity record houses Interaction records, application information, and is the central record for communication between the recruiter and the prospective student (Contact). Additionally, once the student graduates (or their relationship with the university is otherwise terminated) it can be edited to reflect what program the student did (or did not) complete. |

# Overview of the Interactions Package (cont.)

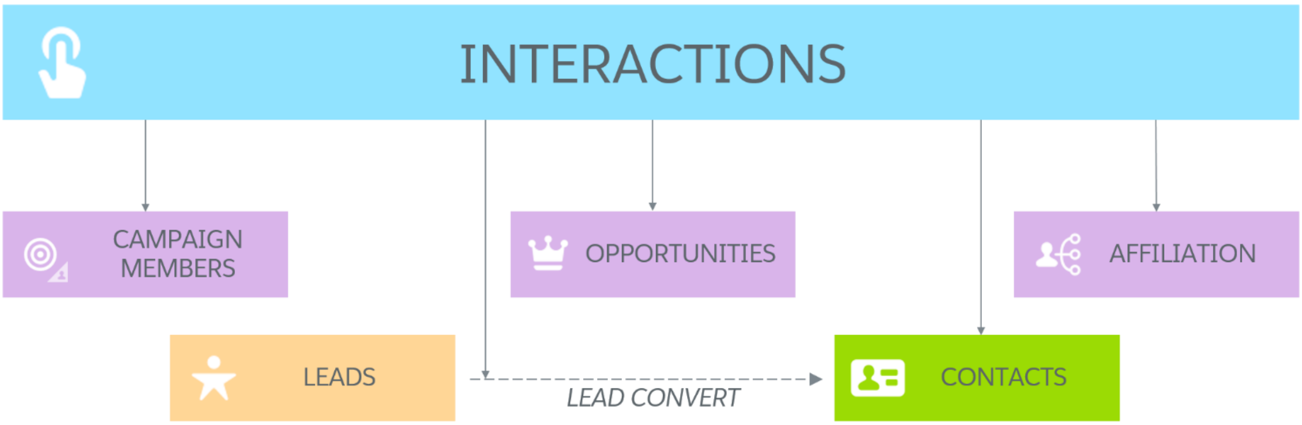
| TYPE OF OBJECT | OBJECT NAME | RECRUITMENT DEFINITION |
|---|---|---|
| SALESFORCE STANDARD | Campaigns and Campaign Members | Campaigns are used to organize and track your specific marketing efforts and hosted events. Whether it's a web form on your university's website or a campus tour event, Campaigns allow you to give credit to the marketing efforts that were most successful in recruiting the best students by linking them with Opportunities, leveraging the standard Salesforce Campaign Influence functionality. |
| HEDA STANDARD | Affiliations | In HEDA, Affiliations are junction object records between a Contact and an Account. Affiliations are primarily used in the package to connect a Contact to an Educational Institution (i.e. the student's current high school or previous university) or Business Organization Account record type via an Interaction. (More on Account record types below.) |
| | Term | The HEDA Term object represents an academic and/or recruitment term for your university. Check with your administrator to discover how Terms are setup for your org. |
| | Account Record Types | HEDA uses an Account Record Type model to differentiate between types of Accounts. The Interactions Package makes use of the Business Organization, Educational Institution, and University Department Account record types. |
| CUSTOM | Interactions | Interactions represent a point-in-time *interaction* (see what we did there?) a prospective student has had with your institution. Additionally, Interactions act as a staging table where data can be written to other object records such as Contacts, Opportunities, and Affiliations. |

# Overview of the Interactions Package (cont.)

| TYPE OF OBJECT | OBJECT NAME | RECRUITMENT DEFINITION |
|---|---|---|
| CUSTOM | Plans | The Plans custom object houses all the records that pertain to specific interests, degrees, programs, tracks, etc. They can be created manually or through integration with an SIS or other system. Plans have a lookup field to “University Department” Account records, making it easy to connect Plan records to the departments within your university. This can be helpful when designing security and also gives the ability to see all Plans that exist for a particular department. The Plans object also comes with two distinct types, one for Recruitment and one for Academic. The purposes of these record types are explained in more detail in the cells below: |
| | Academic (Plans Record Type) | The Academic record type represents the actual interest, degree, track, and/or certificate being pursued by a current student. Academic interests may or may not look-up to a Recruitment interest (defined below). |
| | Recruitment (Plans Record Type) | The Recruitment record type represents the marketable value of a degree (Academic record type) or group of degrees. These values may be displayed on a web page, event registration, or web form. Additionally, they can be used to market degrees that are not yet offered to vet interest in a new or upcoming degree plan. |
| | Interaction Mappings | Similar to HEDA settings, Interaction Mappings make it easy for your administrator to specify which Interaction fields get written to another object’s fields as well as what Interaction Sources are reliable sources of data. We will cover the basics of Interaction Mappings later on in this guide. Your system administrator will decide whether or not to grant access to these records to their users (that’s you!). Our best practice recommendation is to give read only access to high-level users so they are aware of how data will be mapped. Users, check with your admin to find out if you have access to these records and learn how they are setup in your org. |

# Overview of the Interactions Package (cont.)

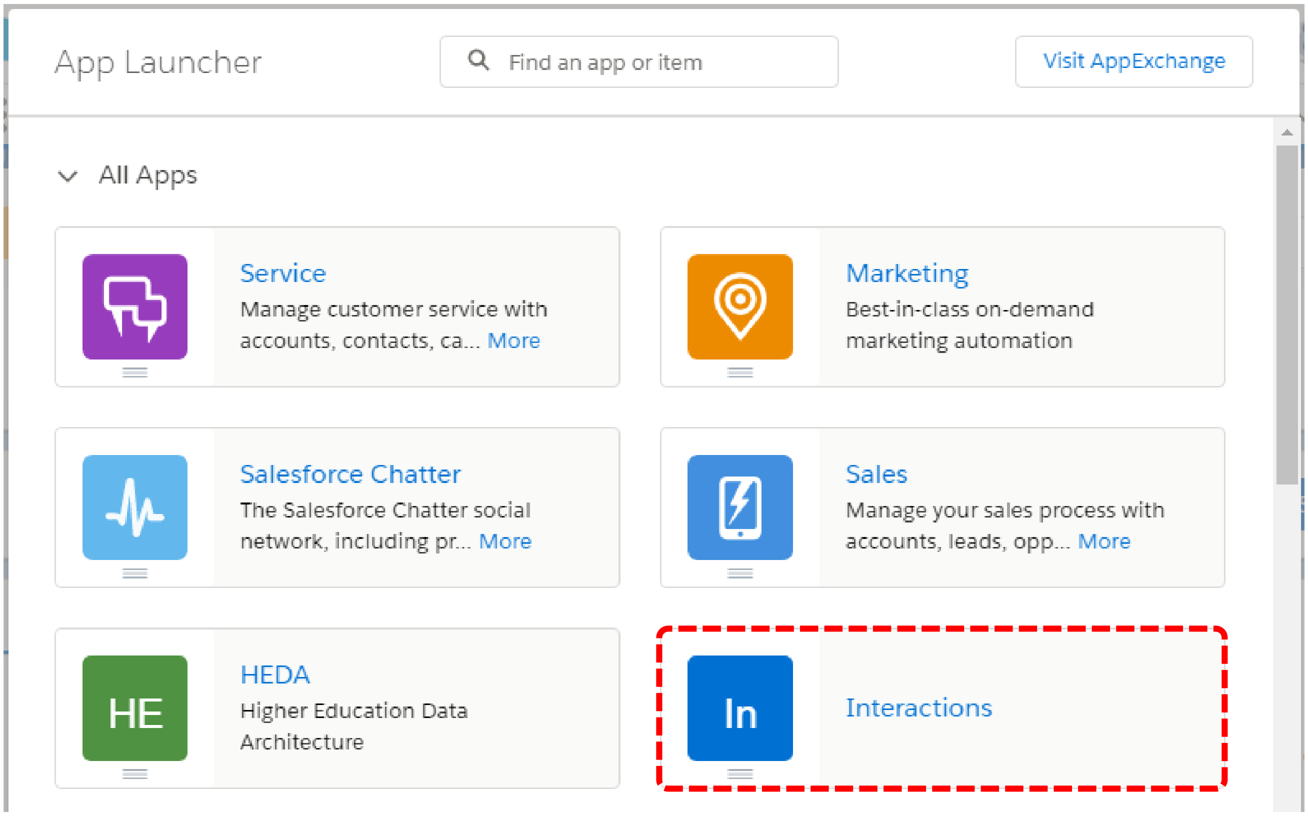
Below is a diagram that displays the objects (or process, in the case of Lead conversion) Interactions can directly write to or use. This does not show the order of operations for Interactions – you'll see that flowchart a little later on.



# In-Depth Features Dive

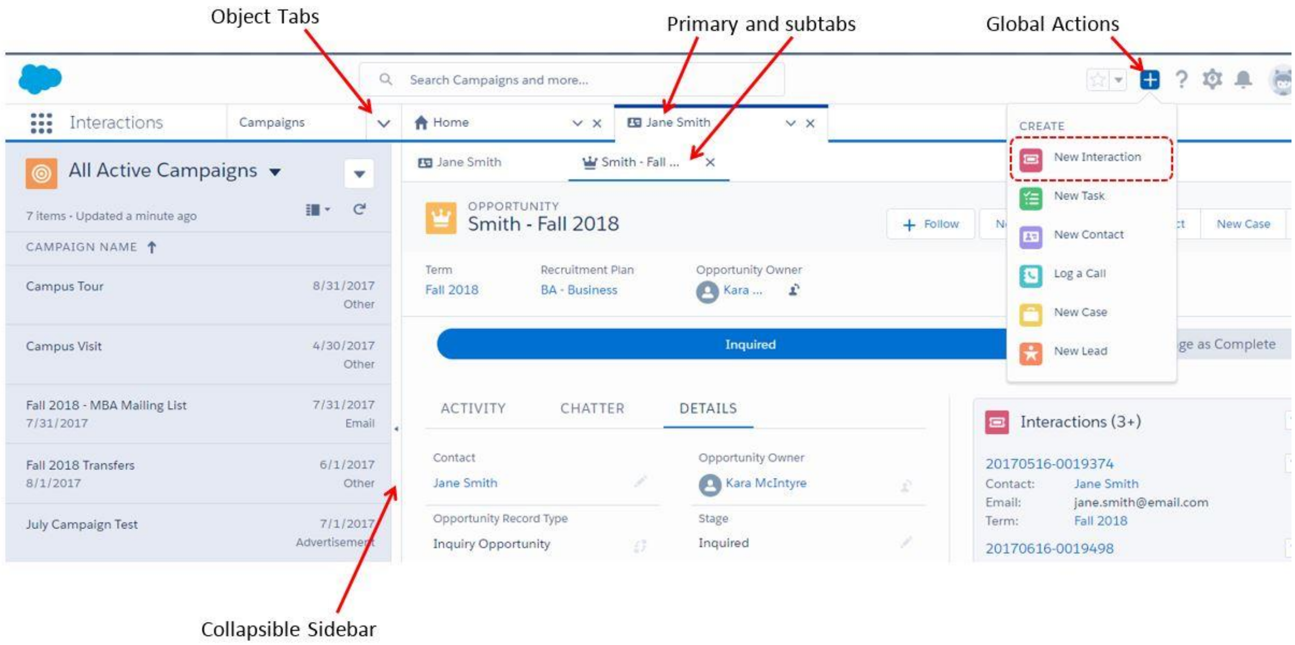
## Navigating the Interactions App

Once the Interactions Package is installed, there will be a new application available to you called “Interactions” you can select from the App Launcher (seen below).



# Navigating the Interactions App (cont.)

The Interactions App is a Lightning Console Application. Below is a quick look at how to navigate this type of Lightning App:

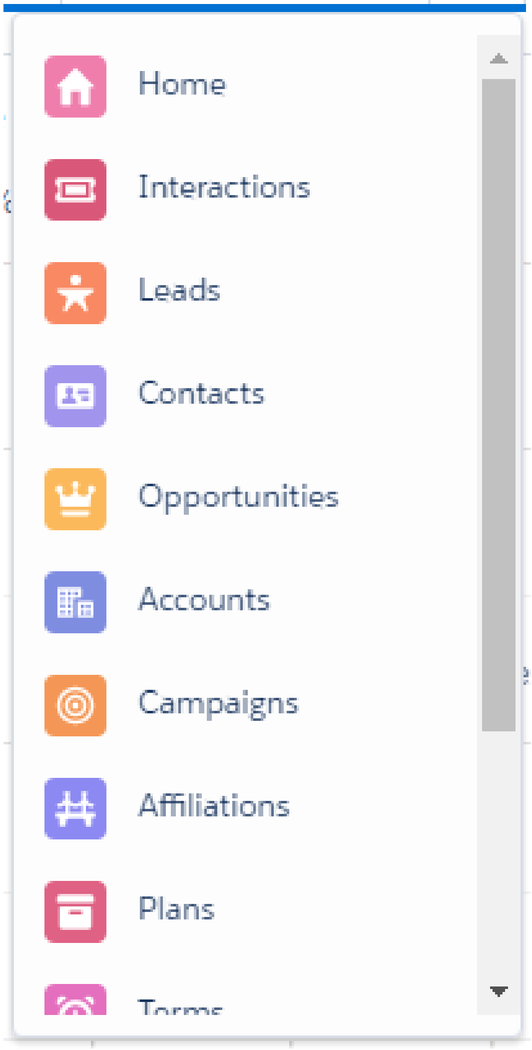



To learn more about Lightning Consoles, visit the Salesforce Help documentation for [Salesforce Consoles](). The rest of this guide assumes that you have looked through the documentation and are aware of how to navigate a Lightning Console App.

# Navigating the Interactions App (cont.)

Out-of-the-box, the Interactions App has the following items (tabs) to select from:

- Home
- Interactions
- Leads
- Contacts
- Opportunities
- Accounts
- Campaigns
- Affiliations
- Plans
- Terms
- Interaction Mappings
- Reports
- Dashboards




**Note:** Users may not see all these tabs, depending on your level of access and profile customizations.

## Standard Objects Used

Before we get into the main features of the package, it is important to note the new fields on Salesforce Standard objects such as Contacts and Opportunities. We provide a quick definition of each Standard object before presenting the new fields. Refer to the table in the Overview of the Interactions Package for more information on each object.

### Contacts

Typically, Contacts are used in recruitment to represent a potential student who has reached out to your university in some way. Contacts are used solely to house bio/demographical information with minimal to no academic data on the Contact record. The only field added to Contacts is Constituent ID, which can be used as a unique external ID for integration or manual data loading purposes. It can also be used for Duplicate Matching rules. Reach out to your administrator to find out if and how this field is being used in your org.

### Opportunities

Opportunities are used as the primary recruitment records and the package leverages Salesforce's standard Opportunity functionality such as stages. The added fields (listed on the next page) allow a recruiter to view a Contact's first and current academic interest(s) for a particular term, quickly identify them as an inquiry or an applicant, and much more from a single Opportunity record.

# Standard Objects Used (cont.)

## Additional Opportunity fields include:

- **Contact**[1] – a Contact lookup field to relate the Opportunity to a Contact
- **Term**[1] – a Term lookup field to relate the Opportunity to a Term
- **Academic Interest**[1|2] – a Plan lookup field filtered by “Academic” Plan record type; the related record represents the actual degree being applied for
- **Recruitment Interest**[1] – a Plan lookup field filtered by “Recruitment” Plan record type; the marketable value of a degree (Academic type) or group of degrees
- **Career**[1] – a formula field that displays the Career (i.e. Graduate) of the Academic Interest, if there is one; otherwise based on the Career of the Recruitment Interest
- **Opportunity Key** – a calculated, unique external ID text field which determines whether an Interaction will create a new Opportunity or edit an existing Opportunity; it is built using a concatenation of related record IDs (and some other magic!) to ensure uniqueness and support of both a central and decentral business process (for more, see the Opportunity Key section later in this guide)
- **School/College** – a formula field that displays the School/College (i.e. School of Business) of the Academic Interest, if there is one; otherwise it displays the School/College of the Recruitment Interest
- **Admit Type** – a single-select picklist with the following out-of-the-box options:
    - New Student
    - Transfer Student
    - Other

[1] Fields used to build an Opportunity Key

[2] Fields only displayed on the Applicant Opportunity page layout

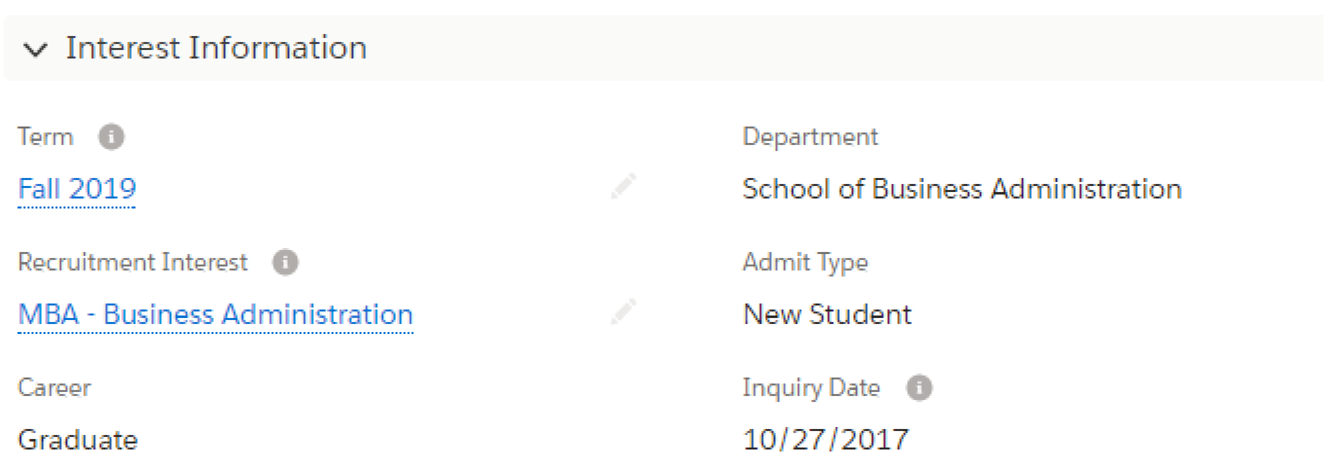
# Standard Objects Used (cont.)

## Additional Opportunity fields (cont.):

- **Inquiry Date** – a calculated date field that displays the date the Opportunity was created
- **First Inquiry Source** – a text field that displays the Lead Source of the Interaction which created the Opportunity
- **First Recruitment Interest** – a text field that displays the Recruitment Interest of the Interaction that created the Opportunity
- **Application Number**[2] – an external, unique ID field used for housing an Application ID number
- **Application Submitted Date**[2] – a calculated date field that displays the date the Opportunity went from the Inquiry to Applicant record type (this field may also be written to via an integration, check with your administrator to find out how it is setup in your org)

[1] Fields used to build an Opportunity Key

[2] Fields only displayed on the Applicant Opportunity page layout



# Standard Objects Used (cont.)

## Leads

Typically, Lead names come from third-party vendors and are purchased by your institution. Leads are used to house both bio/demo and academic interest data for potential students that have not directly reached out to your university. These added Lead fields allow for this dual purpose and are, therefore, similar to existing Contact fields and the extra Opportunity fields.

**Additional Lead fields include:**

- **Term** – a Term lookup field to relate the Lead to a Term
- **Recruitment Interest** – a Plan lookup field filtered by "Recruitment" type
- **Career** – a formula field that displays the Career (i.e. Graduate) of the Recruitment Interest, if there is one
- **Admit Type** – a single select picklist with the following out-of-the-box options:
    - New Student
    - Transfer Student
    - Other
- **Affiliated Account** – an Account lookup field to connect an Account with a Lead and can be used to create an Affiliation between the Account and the Contact after Lead conversion
- **Affiliation Role** – a single-select picklist with the following out-of-the-box options:
    - Student
    - Advisor
- **Primary Affiliation** – a checkbox field used to designate if an Affiliation between an Account and a Contact should be primary after Lead conversion

# Standard Objects Used (cont.)

### Additional Lead fields (cont.):

- **Constituent ID** – an external, unique ID field used for integrations or duplicate management; check with your administrator to find out if and how this field is being used in your org
- **Birthdate** – a date field for the Birthdate of the Lead
- **Race** – a multi-select picklist with the following out-of-the-box options:
  - American Indian or Alaska Native
  - Black or African American
  - Native Hawaiian or Other Pacific Islander
  - White
  - Asian
- **Ethnicity** – a single-select picklist with the following out-of-the-box options:
  - Hispanic or Latino
  - Not Hispanic or Latino
- **Gender** – a single-select picklist with the following out-of-the-box options:
  - Male
  - Female

### Campaigns and Campaign Members

Campaigns help you and your department track specific marketing and recruitment efforts. The additional fields on Campaigns and Campaign Members are specifically used to create unique, identifying fields (keys). These are used by the Interaction Processor code to match records and can also be used for integrations and/or manual data loading processes. As an end user, you may not have access to view these fields. If you are an administrator or data loading user, check out the Installation and Configuration Guide for more information about how these fields are set up.

# Opportunities for Recruitment

Opportunities are an awesome standard Salesforce object with tons of baked-in sales functionality. This is exactly why Interactions for Student Recruitment makes use of this powerful object since you (the recruiter) are, in essence, selling the educational value and experience of your university to prospective students. To learn more about how Opportunities work for Sales, visit the Leads & Opportunities module in Trailhead. The rest of this section assumes you have some knowledge of standard Opportunity functionality including Sales Processes and Opportunity Stage trend reporting.

As we've covered in previous sections, Opportunities represent a potential or actual application for your university. Further, unlike standard Salesforce functionality, the Interactions Package connects Opportunities to Contacts via a lookup field on the Opportunity. That way, a Contact (prospective student) can have multiple Opportunities (applications) associated to them.

Out-of-the-box, the Interactions Package comes ready to support both a centralized and decentralized recruiting process. Additionally, it is recommended to add two sales processes and record types to Opportunities (Inquiry and Applicant) to support different inquiry-level and applicant-level stages. We will talk more about the centralized vs. decentralized model in Matching Records.

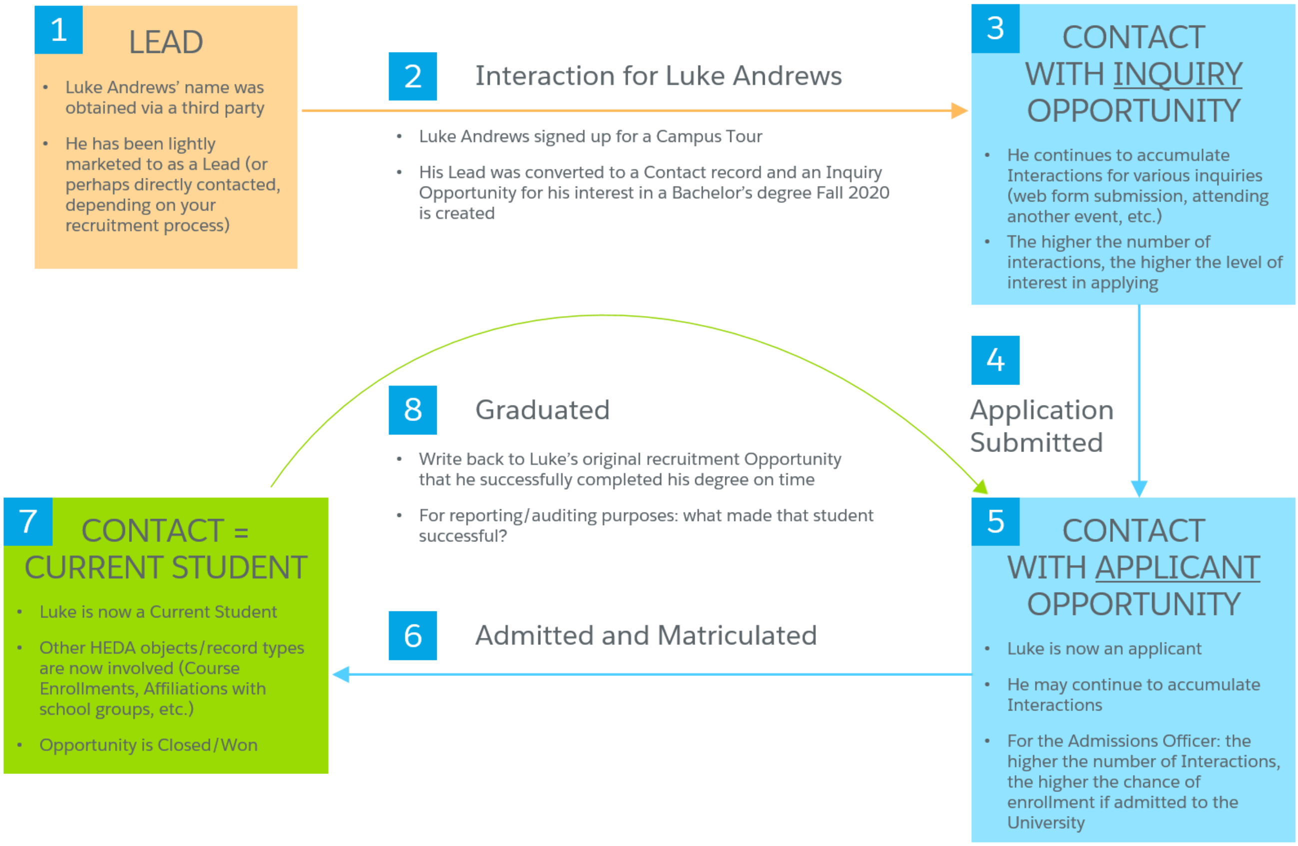
For now, let's take a look at the Student Recruitment Model to get a glimpse of what it means to be at the Inquiry vs. Applicant level of the recruiting process.

# Opportunities for Recruitment (cont.)

**Note:** Your implementation may not separate inquiries vs. applicants. Check with your administrator to discover how the inquiry to applicant pipeline is setup in your org. Admins, check out the Installation and Configuration Guide.

## The Student Recruitment Model

The Student Recruitment Model demonstrates the common path a prospective student goes through from being a purchased list name to a graduate of your university. Additionally, it is the primary data model that Interactions for Student Recruitment follows:



# Opportunities for Recruitment (cont.)

### The Student Recruitment Model (cont.)

The chart on the previous page follows Luke Andrews through his recruitment experience and shows how Interactions played a role at both the Inquiry and Applicant levels for Luke.

**(1)** We start the path at the Lead level. Generally, Lead names come from third-party vendors and are purchased by your institution. When the Lead reaches out to your university (or their level of interest is otherwise eligible to become a Contact), **(2)** the Lead is converted into a Contact record via an Interaction. **(3)** At this point, the Contact is now considered an inquiring student and an **Inquiry** Opportunity record type record is also created for the newly converted Contact with Inquiry level stages (more on the actual stages next!).

Recruiters market to the Contact through the Opportunity record with personalized emails and phone calls as well as inviting them to events on campus. **(4)** The student submits their application. **(5)** Now, the Inquiry Opportunity is converted into an Applicant Opportunity record type to include additional application fields as well as Application stages to track their progress. **(6)** The Contact is eventually admitted to the university and decides to matriculate and enroll. **(7)** The Contact is now a current student.

**(8)** Down the line, the Contact successfully finishes their degree on time and this information is added to his Applicant Opportunity for reporting purposes.

# Opportunities for Recruitment (cont.)

### The Opportunity Pipeline

The full Opportunity Pipeline for recruitment starts at the point of inquiry (numbers 2 and 3 in the Student Recruitment Model) and tracks the Contact's progress through the Inquiry stages:


As the Contact accumulates more meaningful Interactions, the recruiter (you) can manually push the Opportunity through the stages as you build a relationship with the student and they accrue Interactions. The ultimate goal of the Inquiry level is to reach the stage of "Applied." Reaching this stage will automatically convert the Opportunity record's record type from Inquiry to Applicant.

There is no Closed/Won stage at the Inquiry Level. The Closed/Lost stage at the Inquiry level included in the package is "No Longer Interested."

**Note:** Your administrator may have automated or changed some of the recommended stages to customize them to your school's recruitment process. Check with them to find out your org's best practices and at exactly what point the Inquiry Opportunity is converted to an Applicant Opportunity.

# Opportunities for Recruitment (cont.)

Once the Opportunity record for a Contact is converted from the Inquiry record type to the Applicant record type, the Opportunity stages displayed are updated to reflect the second half of the Opportunity Pipeline, the Applicant stages:


Applicant stages are designed to help you track the student's progress through the application process. They may still be accumulating Interactions during these stages which can be used by admissions officers to identify prospective students with the highest level of interest in coming to your university, if admitted.

The Closed/Won stage at the Applicant level included in the package is "Enrolled." The Closed/Lost stages at the Applicant level included are "Withdrawn" and "Denied."

**Note:** Just like with the inquiry stages, it is probable that your administrator has customized these stages to align with your university's best practices and may have even automated some of the pipeline, depending on your integrations.

**Note:** Don't forget to check with your admin to learn about how the Opportunity Pipeline is setup for your org, including what portions (if any) are automated, best practices for each stage, and which stages designate "Closed/Lost" Opportunities at both the Inquiry and Applicant level.

# Matching Records

The Interactions Package leverages both standard and custom solutions to solve the challenges of matching records and preventing duplicates. Standard Salesforce Duplicate Management tools (duplicate and matching rules) are used to avoid the creation of duplicate Leads and Contacts while custom "Key" fields ensure that related records (such as Opportunities or Affiliations) are being created or updated appropriately.

## Duplicate Management for Leads and Contacts

The recommended Duplicate Management rules for both Leads and Contacts are the most basic, using First Name, Last Name, Email address, and/or Constituent ID. Check with your administrator to learn about the duplicate and matching rules setup for your org.

If you are an administrator, please visit the Duplicate Management Salesforce help page and the Installation and Configuration Guide for more information about customization options.

# Matching Records (cont.)

## Key Fields for Related Objects

Opportunities, Affiliations, Campaigns, and Campaign Members all come equipped with “Key” fields in the Interactions Package. These fields allow the Interaction Package code to know whether to create a new record or update an existing record, preventing duplicates and keeping your data up to date. All “Key” fields are built using specialized formula fields on the Interactions object and the value is passed to the appropriate related object field via a workflow rule and field update.

The Affiliation Key is built by concatenating two fields:
**Contact’s 18-digit ID + Affiliated Account’s 15-digit ID**

The Campaign Key is simply the 18-digit ID of the Campaign.

The Campaign Member Key is built by concatenating two fields:
**Lead or Contact’s 18-digit ID + Campaign’s 18-digit ID**

These keys allow you to change the Role or Primary designation of an Affiliation without creating a new record as well as updating an existing Campaign Member in a Campaign without creating duplicates. You’ll see all of these in action a little later on. But first, let’s look more closely at the Opportunity Key and the Centralized and Decentralized recruitment models.

# Matching Records (cont.)

## Opportunity Keys – Centralized vs. Decentralized Models

Because each university and even departments within one university can have very different requirements for how many Opportunities a Contact should have for a single Term, the Interactions Package comes prepared to support two different recruitment models: a centralized model and a decentralized model. For the purposes of this guide, we'll go back to CU to see how their Undergraduate Admissions office uses the Centralized Recruitment Model while the Graduate programs use the Decentralized Recruitment Model.

**Note:** The following discussion is based on how Opportunity Keys come out-of-the-box. Check with your administrator to find out what, if any, customizations have been implemented for your org.

If you are an administrator, see the Installation and Configuration Guide to learn how you can customize these models to fit your university's business processes.

# Matching Records (cont.)

## Centralized Recruitment Model – Undergraduate Admissions at CU

CU's Undergraduate Admissions department utilizes a single-stream general admissions process whereby, regardless of what declared Major or other academic interests a prospective student has, the prospect submits a single application for admission into the undergraduate programs. Due to this single-stream application process and the many times students can change their academic interests before and even after they apply, the Undergraduate Admissions department at CU requires a prospective student (Contact) to have a single Opportunity record (regardless of academic interest) per Term of interest.

This means that a student can change their academic interest on web form submissions, event registrations, or other activities that result in an Interaction record without creating a brand new Opportunity record each time. Additionally, since Interaction records serve as a log, a recruiter or admissions officer can easily view all of a potential student's academic interests in one place, helping them to connect the prospect with current students or faculty in their areas of interest.

So, how does the Interaction code know not to create a new Opportunity for each different academic interest a student may have for a particular term? By using the Opportunity Key!

# Matching Records (cont.)

Opportunities with an “Undergraduate” Career (based on the Academic Interest, if there is one; otherwise, based on the Recruitment Interest) have their Opportunity Key built by concatenating three fields:

**Contact’s 18-digit ID + Career value (Undergraduate) + Term’s 15-digit ID**

As long as the Career value is “Undergraduate” for a Plan of interest and the Term on the Interaction matches an existing “Undergraduate” Opportunity for a particular Contact, the existing Opportunity record related to that Contact will be updated with data from the Interaction. The Interaction is then connected to that existing Opportunity.

# Matching Records (cont.)

## Decentralized Recruitment Model – Graduate Programs at CU

The Graduate programs at CU have a very different set of needs because they deal with much fewer prospects than Undergraduate Admissions, and the graduate program application process is not single-stream. Many graduate programs require prospective students to submit an application for the specific degree program they wish to pursue at the School or College within the University, not only general admission into the University (like with Undergraduate Admissions). Let's look again at the School of Business at CU.

Remember Emily? She's the Executive MBA recruiter for the School of Business at Connected University. Because the graduate admissions process requires prospects to submit a specified Executive MBA application, Emily and her colleagues at the School of Business needed Opportunity records for prospects to be separated by Plan of interest as well as Term to connect with their prospects effectively.

Not only does each recruiter have their own point of contact with the prospect, they can also see each other's Opportunities, making it easy to work together to ensure potential students are being matched with the right programs to apply. A win for the School of Business is a win for all the recruiters, regardless of the program they represent.

# Matching Records (cont.)

Therefore, Opportunities with a "Graduate" Career (based on the Academic Interest, if there is one; otherwise, based on the Recruitment Interest) have their Opportunity Key built by concatenating four fields:

**Contact's 18-digit ID + Career (Graduate) + *Plan of Interest's 15-digit ID + Term's 15-digit ID**

**the Plan's ID is based on the Academic Interest, if there is one; otherwise it is based on the Recruitment Interest*

In practice, this means that each time a student requests more information about a different graduate program within the School of Business, individual Opportunity records are created for each area of academic interest (even if they are inquiring about the same Term).

**Note:** Users, remember to check with your administrator to find out how Opportunity Keys have been set up for your program, department, and/or school.

Admins, remember these are only two use cases for how to implement a centralized or decentralized recruitment model. Opportunity Key field customizations along with Sharing Settings allow you to implement a variety of models to find the best fit for your business processes. Check out the Installation and Configuration Guide and Technical Implementation Guide for more about customizing Opportunity Keys.

# Interaction Features

And now, the moment you've all been waiting for: Interactions! In this section, we'll look at exactly how the Interaction code functions (its order of operations), discuss some best practices for creating Interactions, and troubleshooting. You'll even create some Interaction records to see them in action!

## How Do Interactions Work? – The Interaction Model

Each Interaction record that is created has the potential to:

- Convert an existing Lead record into a Contact
- Create or update a Campaign Member
- Create or update a Contact
- Create or update an Opportunity
- Create or update an Affiliation

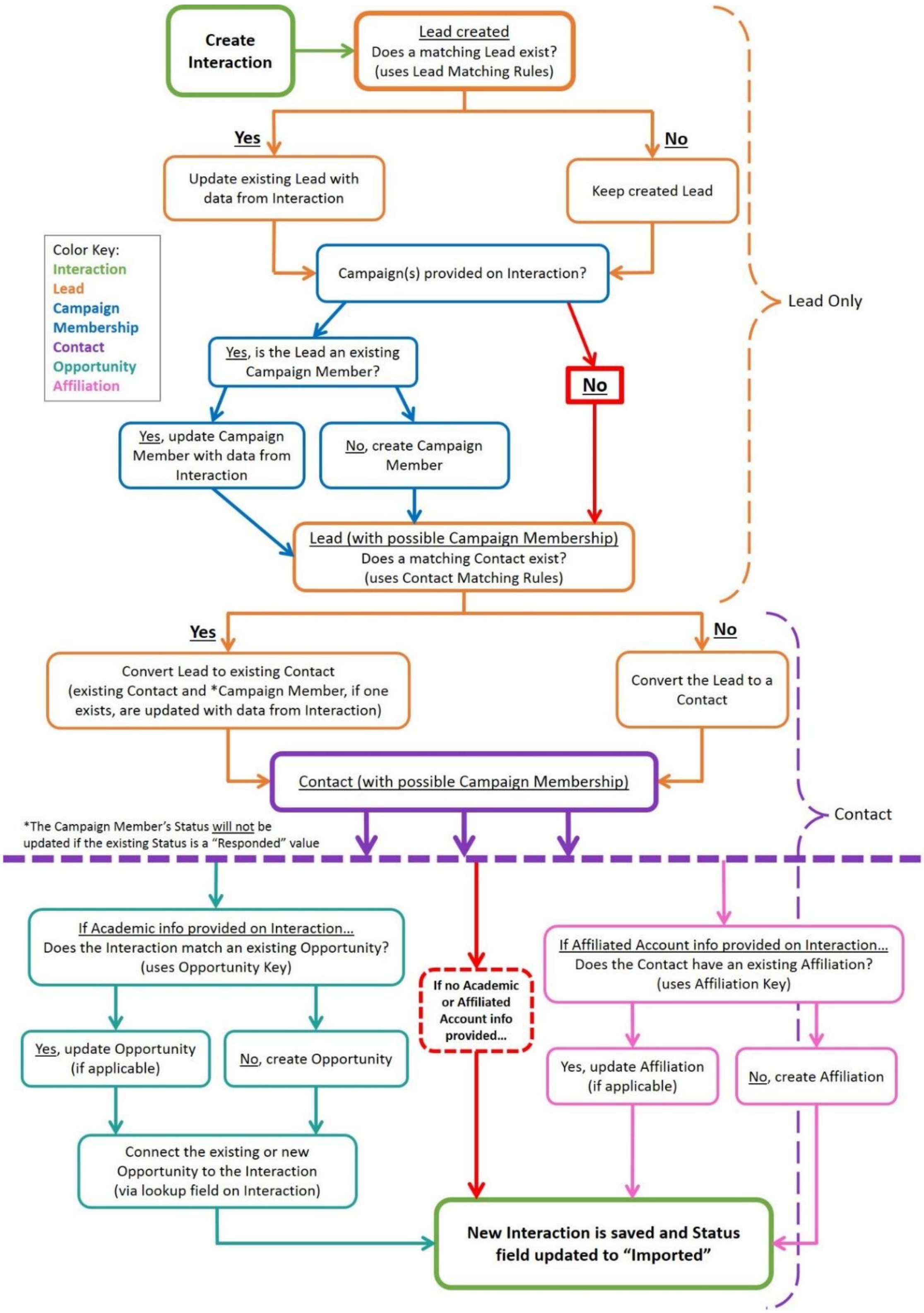
These powerful records provide historical snapshots to recruiters of every noteworthy moment when a prospective student (Contact) has reached out to the university. They also keep a prospect's Contact record and its related records up-to-date, whether it be their bio/demo information or academic interests.

# Interaction Features (cont.)

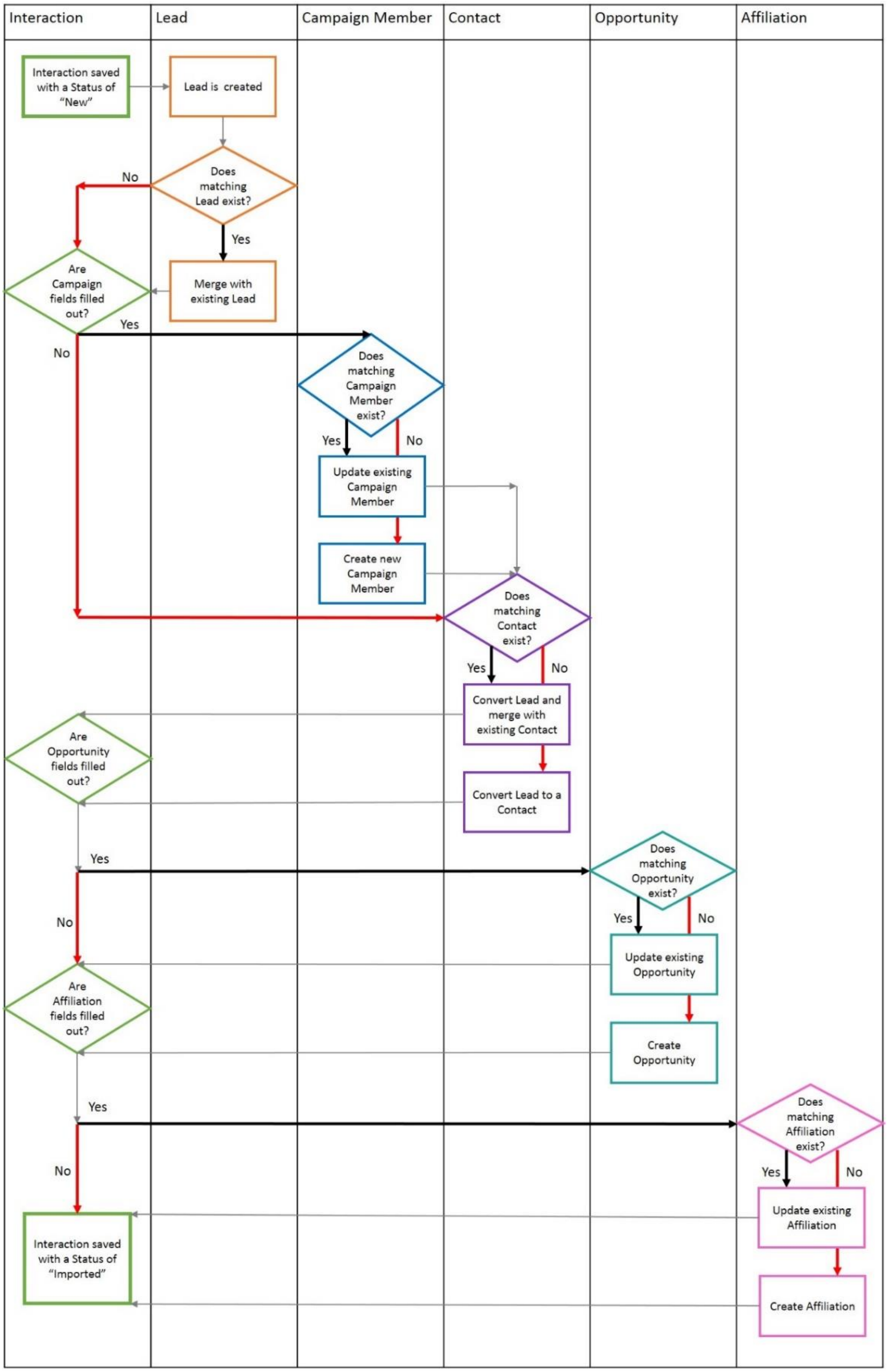
The **Interaction Model** shows when and which records are created or updated by logging a single Interaction, including the other objects and processes involved (such as Duplicate Management) each step of the way. When an Interaction record is created, the Interaction Processor (the behind-the-scenes custom code) searches for any existing records via Lead and/or Contact Matching Rules. If existing records are found, they are updated as applicable. Depending on other data provided on the Interaction such as academic interest information or current school data, other related records may be created or updated.

Since everyone learns differently, we've provided the same Interaction Model as both a flow chart and a swim lane diagram for your convenience. Take a moment to read through the models and then we'll follow Emily, the recruiter from the School of Business at CU, as she logs her very first Interaction in the next section.

# Interaction Features (cont.)



# Interaction Features (cont.)

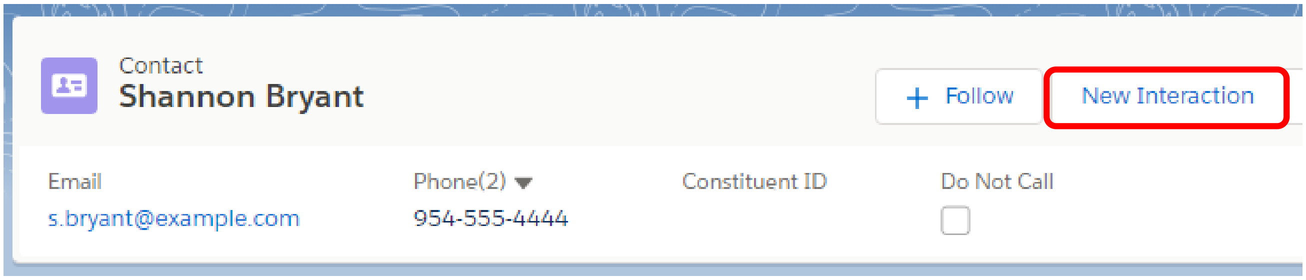


# Interaction Features (cont.)

## Emily Logs her First Interaction

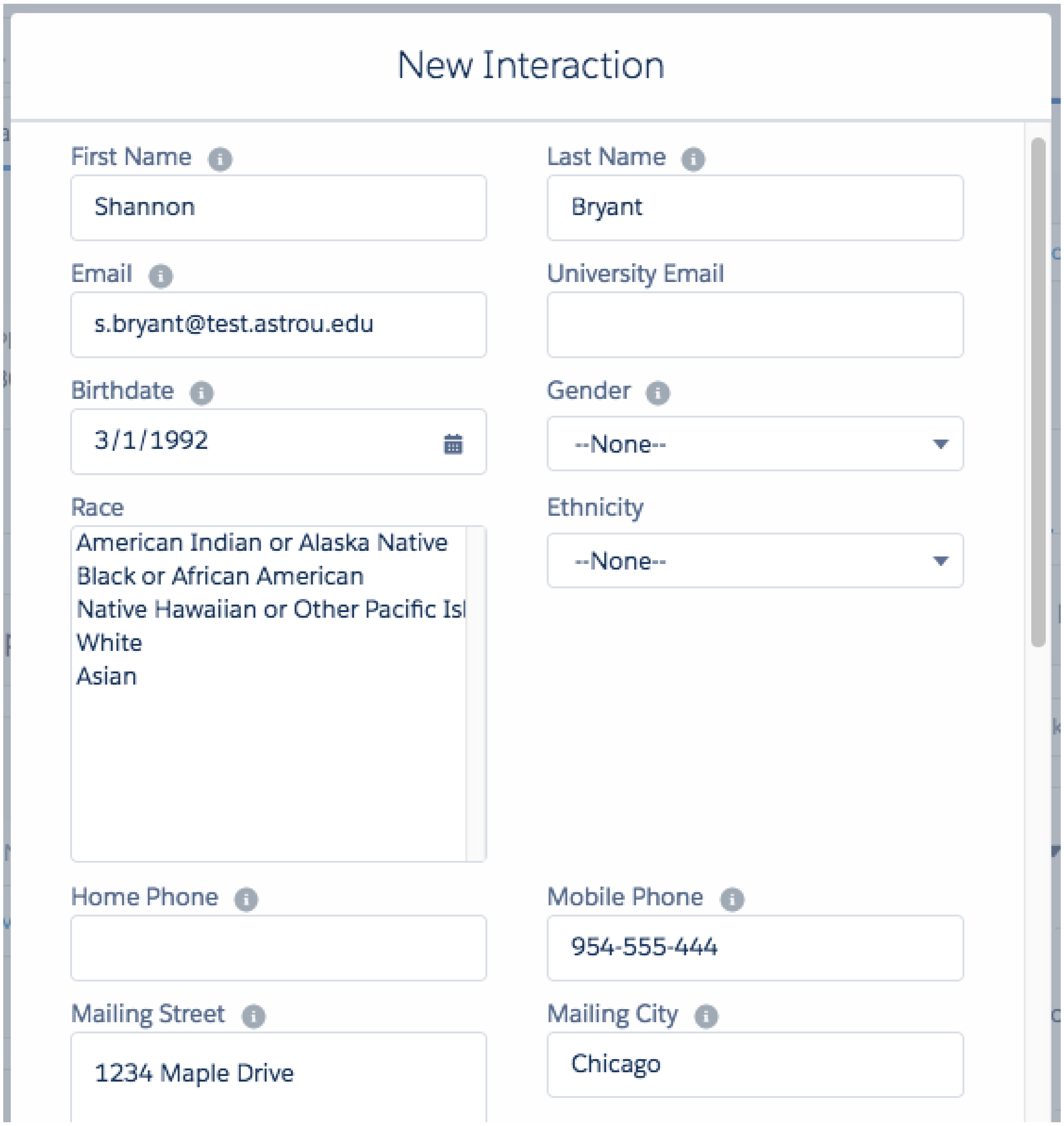
Emily gets a call from Shannon, a student who is interested in pursuing an Executive MBA degree at CU's School of Business. Emily asks Shannon for her full name and email address to search for her in Salesforce while asking Shannon about her past educational experience and what she hopes to gain from receiving her Master's degree.

As it turns out, Shannon completed her Bachelor's degree at CU and already has a Contact record as well as an old, closed/won undergraduate Opportunity record in Salesforce. As Emily continues talking to Shannon, she clicks the "New Interaction" button on Shannon's Contact record.



# Interaction Features (cont.)

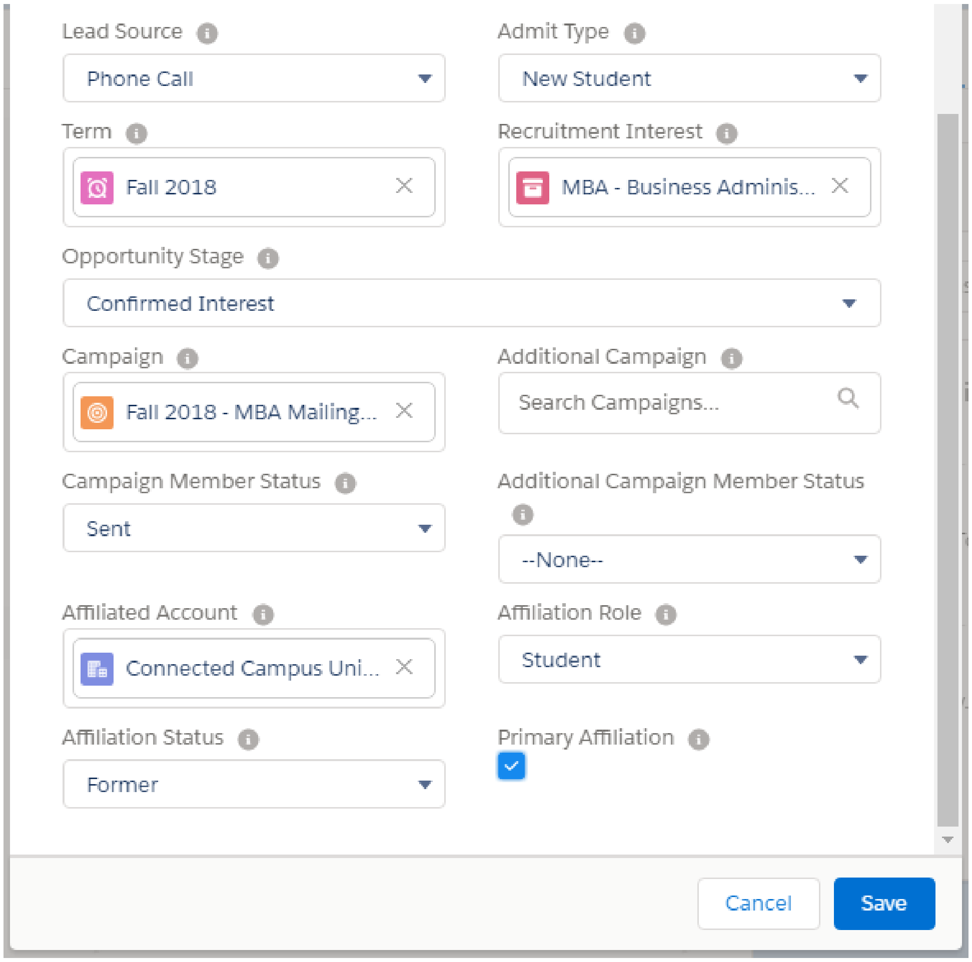
A pop-up appears to create a new Interaction and is pre-filled with most of the information from Shannon's Contact record. Emily asks Shannon if any of her bio/demo information has changed, and fills in or updates fields for the new Interaction record:



# Interaction Features (cont.)

Emily also asks about Shannon's academic interests, adding the "MBA – Business Administration" Recruitment Interest to the Interaction as well as the "Fall 2018" Term. Since Shannon seems very interested in pursuing her Master's at CU, Emily sets the Opportunity Stage to "Confirmed Interest." Emily then connects the Interaction to CU's Educational Institution Account record for Shannon with a Role of "Student" and Status of "Former."

Finally, because Shannon has asked Emily to include her in any mailing lists for information about upcoming events, Emily adds the "Fall 2018 - MBA Mailing List" Campaign to the Interaction with a Campaign Member Status of "Sent."



# Interaction Features (cont.)

Emily saves the Interaction once she has hung up with Shannon and watches as Shannon's bio/demo information on her Contact record is updated, a new Opportunity record is created, the existing Affiliation related to her Contact record is updated from Status "Current" to "Former," and Shannon is added as a Campaign Member to the "Fall 2018 – MBA Mailing List" Campaign. All of this, just by logging a single Interaction.

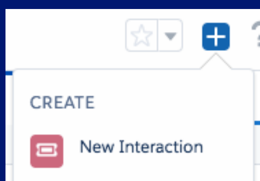
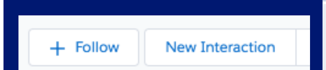
## Creating Interactions Best Practices

As you can see, Emily greatly benefitted from using Interactions. She was impressed with the ability to update or create multiple records through one Interaction. Emily also appreciated the "New Interaction" button on the Contact record, which allowed her to focus on the important aspects of her conversation with Shannon without having to take time re-entering existing information for Shannon.

The Contact record is not the only place where such a button exists and there are other use cases for using the other object-specific buttons or the new global action that comes with the Interactions Package. All the object-specific Custom Actions come pre-filled with data from the record you click from to make logging Interactions quick and easy.

Take a look at the table on the next page to find out where these other custom actions are and some use case examples for each.

# Interaction Features (cont.)

| ACTION TYPE | LOCATION OF ACTION/BUTTON | USE CASE |
|---|---|---|
| **GLOBAL ACTION**   | Global Quick-Action Menu | 1) Emily receives a call from a prospective student. She searches for the student in Salesforce but there are no existing records. Instead of going to the Interactions object to click New, she goes to the Global Quick-Action menu and selects New Interaction.<br>2) Swamped with prospects coming for an open house event, Emily does not have time to search for each prospect in Salesforce. She uses the New Interaction Global Quick-Action to input information on the students efficiently. |
| **OBJECT-SPECIFIC CUSTOM ACTION BUTTON**   | Lead Layout | A prospective student comes to Emily's office looking for more information on the MBA programs at CU. When Emily searches for them in the system, a Lead already exists. She uses the New Interaction button on the Lead record to quickly log the Interaction and convert the prospect's Lead record into a Contact. |
| | Contact Layout | A Contact record already exists for the prospect who called Emily to inquire about the MBA programs. See Emily's First Interaction for more details about their phone call. |
| | Opportunity Layout | A prospect, whom Emily has been working with, comes to her office to chat with her more about the MBA programs and get a one-on-one tour of the campus. Emily uses the New Interaction button on the existing Opportunity record to mark that the prospect has come to see her in person. |
| | Campaign Layout | Emily is hosting a small information session on campus for her highest level recruits. She uses the New Interaction button on the Campaign record to quickly update or create Campaign Members for the prospective students who show up to the event. |

**Note** that the only fields that cannot come pre-filled are picklist fields (e.g. gender). Vote on this idea in the Success Community to add the ability to pre-fill picklist field values!

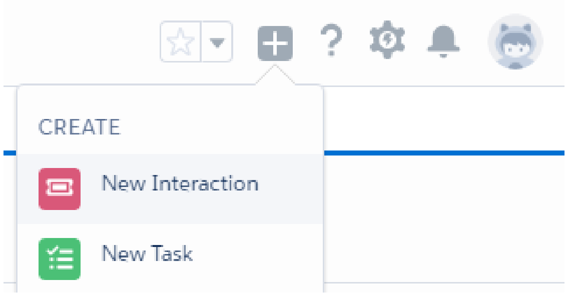
# Interaction Features (cont.)

## Create Contact Interaction Records

You are now going to create your very first Interaction records! First, you will create an Interaction for a new prospective student for your university, which results in brand new Contact and Opportunity records. Then, you'll create an Interaction for a non-recruit (a high school advisor in this example), resulting in a new Contact and Affiliation record.

Create an Interaction for a Prospect

1. Select **New Interaction** from the Global Quick-Action menu:



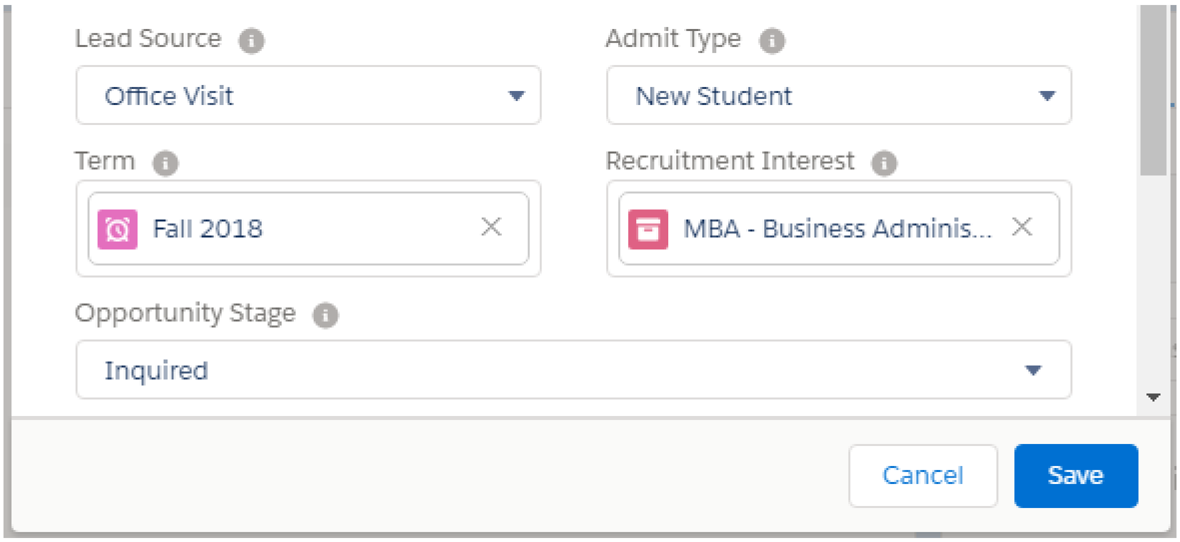

2. Fill in the bio/demo information for the prospect

3. Fill in the academic interest information for the prospect:

   - Enter in a future Term (e.g. Fall 2018)
   - Enter a Recruitment Interest (e.g. MBA – Business Administration)
   - Select a Lead Source (e.g. Office Visit)
   - Choose an Admit Type (e.g. New Freshman)
   - Leave the Opportunity Stage at the default value of "Inquired"

# Interaction Features (cont.)

**Note:** If you do not fill in a Term, Recruitment Interest and Opportunity Stage, an Opportunity will not be created. See Troubleshooting Interactions for more!




4. Click the **Save** button

5. Click through the newly created Interaction, Contact, and Opportunity records

6. Note the “Status” of the Interaction, it should be “Imported”

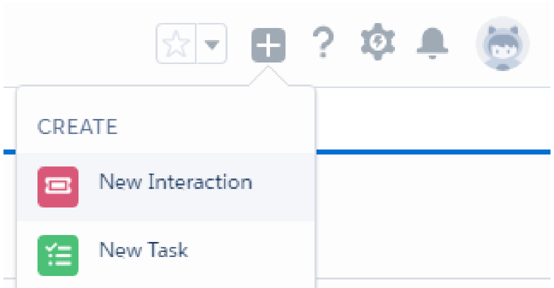
7. Note the “Inquiry Date” and “First Inquiry Source” fields on the Opportunity. These fields will not change as new Interactions are logged for the Opportunity.

Congratulations! You’ve just created a new Contact with an Opportunity for a prospective student. Now, let’s create a Contact with an Affiliation for an advisor from a local high school.

# Interaction Features (cont.)

## Create an Interaction for a High School Advisor

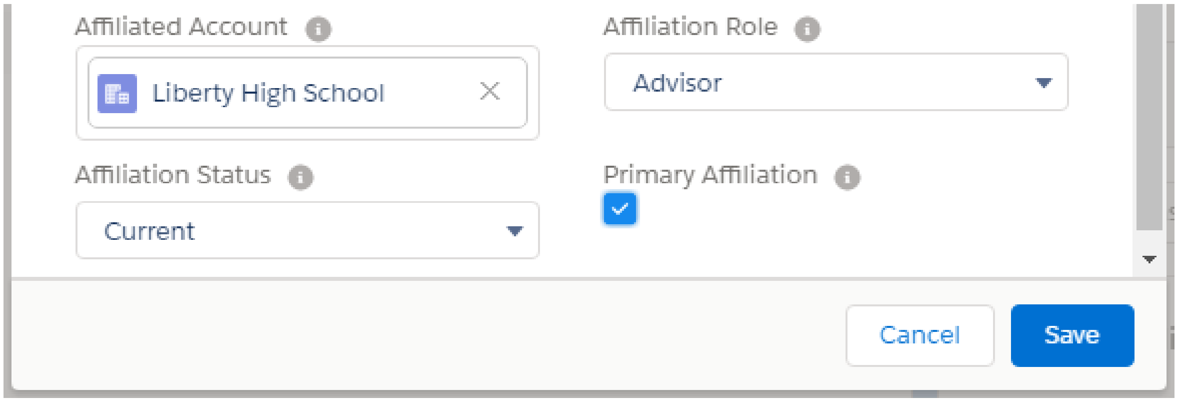
1. Select **New Interaction** from the Global Quick-Action menu




2. Fill in the bio/demo information for the advisor

3. Fill in the Affiliated Account information for the advisor:

   - Enter an Affiliated Account (e.g. Liberty High School)
   - Select an Affiliation Role (e.g. Advisor)
   - Choose an Affiliation Status (e.g. Current)
   - Check the Primary Affiliation checkbox



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# Interaction Features (cont.)

4. Click the **Save** button

5. Click through the newly created Interaction, Contact, and Affiliation records

6. Note the “Status” of the Interaction, it should be “Imported”

7. Note that, because we checked “Primary Affiliation,” Liberty High School is the Primary Educational Institution on the Contact record.

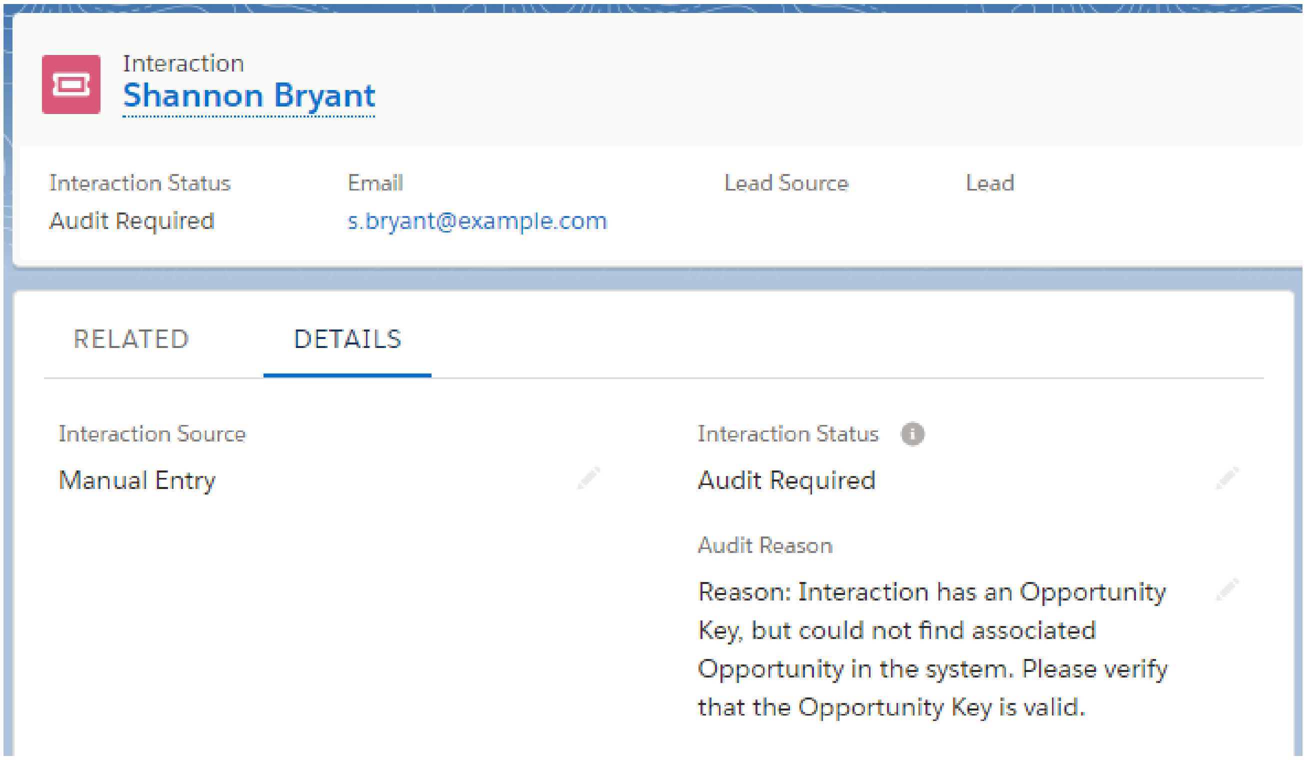
Congratulations! You’ve now created a new Contact and Affiliation for a high school advisor. Read on to find out what you can do if you mistakenly enter incorrect information on an Interaction, and other troubleshooting tips.

# Interaction Features (cont.)

## Troubleshooting Interactions

Sometimes, Interactions fail to do all the magical things we have come to expect from them. When an Interaction fails, its Status is updated to “Audit Required” instead of “Imported.”

In moments like these, it is important to review the Interaction record and try to determine why it failed and what you can do to fix it. Luckily, the Interactions code can provide reasons for why an Interaction has failed in the Audit Reasons field, right on the Interaction record.




Read through the table on the next page to learn about the possible Audit Reasons and some tips on how to troubleshoot them.

## Interaction Features (cont.)

| ERROR NAME | MESSAGE | NOTES |
|---|---|---|
| **OPPORTUNITY UPDATE ERROR** | Reason: Interaction has an Opportunity Key, but could not find associated Opportunity in the system. Please verify that the Opportunity Key is valid. | An Opportunity was created via the Interaction Processor but, for some reason, it was not connected back to the Interaction that created it. This could be because it's missing the required field(s) for correctly creating an Opportunity. To troubleshoot, check that the Interaction has all the required fields populated for creating an Opportunity, update any fields and re-process*. |
| **INTERACTION DUPLICATE ERROR** | Reason: this Interaction was not processed because it is a possible duplicate of - ' + filteredMap.get(filterKey).Id + ': ' + filteredMap.get(filterKey).First_Name__c + '' + filteredMap.get(filterKey).Last_Name__c + '' + filteredMap.get(filterKey).Email__c; | Interaction loads sometimes have duplicate rows in them. To help solve this, the Interaction Processor has code at the beginning that concatenates First Name + Last Name + Email to create a key that will allow the potential "duplicate" Interaction to be created, but they will go straight to Audit Required and the code will not run for those Interactions. To troubleshoot, compare the 'Audit Required' Interaction record to the Interaction it matched with and decide whether to delete one of the Interactions or update any fields and re-process*. |
| **CATCH-ALL LEAD INSERT ERROR** | Reason: Error during Lead insert - ' + error.getMessage() + '.'; | For some reason, there was an error when the Lead was being created. This could be because there are missing required fields for creating a Lead. To troubleshoot, check that all the required fields are populated on the Interaction, update any fields, and re-process*. |
| **CATCH-ALL LEAD CONVERSION ERROR** | Reason: Error during Lead conversion - ' + error.getMessage(); | For some reason, there was an error when the Lead was being converted. This could be because there are missing required fields for creating a Contact. To troubleshoot, check that all the required fields are populated on the Interaction, change any fields and re-process*. |

*To learn about re-processing Interactions, read on to the next section.

# Interaction Features (cont.)

## Re-Processing Interactions

Oops, Emily logged an Interaction for Shannon with the wrong birthdate and forgot to include her in a Campaign by mistake. Instead of editing the birthdate field on the Interaction and Contact, as well as adding the Contact to the Campaign manually, Emily is able to re-run the Interaction with the correct birthdate and Campaign information to quickly rectify her mistake.

**But how, do you ask? Follow the steps below to find out:**

1. Open one of your previous Interaction records.
2. Edit the Interaction
    - Set the Status from “Imported” to “New”
    - Update erroneous information or add new data to the Interaction
3. Click the **Save** button
4. Note the Status of the Interaction after it saved, it should have gone back to “Imported”
5. Review the Contact and any affected related records to ensure your updates were successful

# Interaction Features (cont.)

Whether it's simply a typo in a field or for troubleshooting Audit Required Interactions, re-processing gives you the ability to resolve the error quickly and efficiently.

**Note:** Before re-processing Interactions for actual prospects, remember these two things:

- Re-processing Interaction records runs the Interaction code again as if each is a brand new Interaction record
- Therefore, take caution in re-processing Interactions that are old and with information that is no longer current as these values will overwrite existing, current information

# Interaction Mappings

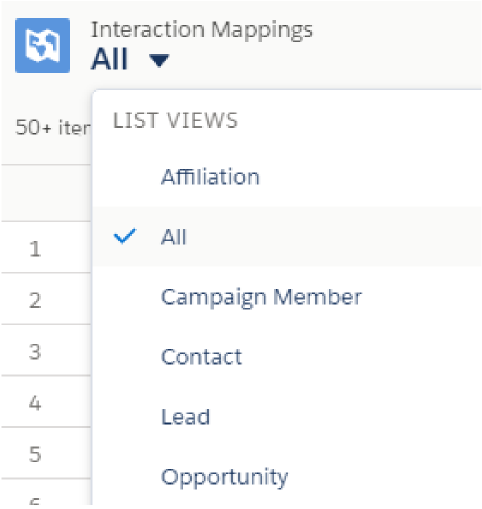
Interaction Mappings is the other custom object that comes with the Interactions Package. Interaction Mapping records dictate how a field on an Interaction gets mapped to a field on one of the connected objects (Leads, Contacts, Opportunities, Affiliations and Campaign Members). For every field that needs to be written to a field on particular object, an Interaction Mapping record needs to be created.

Now, as a user, you would typically not be the one creating these records; your system administrators would. You may or may not have access to these records. Check with your administrator to find out if you can view Interaction Mapping records.

Admins, to learn more about how to set up Interaction Mapping records, see the Installation and Configuration Guide as well as the Technical Implementation Guide.

The Interactions Package comes with four list views for the Interaction Mappings object. Each list view returns all mapping records by target object:

- Affiliation
- Campaign Member
- Contact
- Lead
- Opportunity

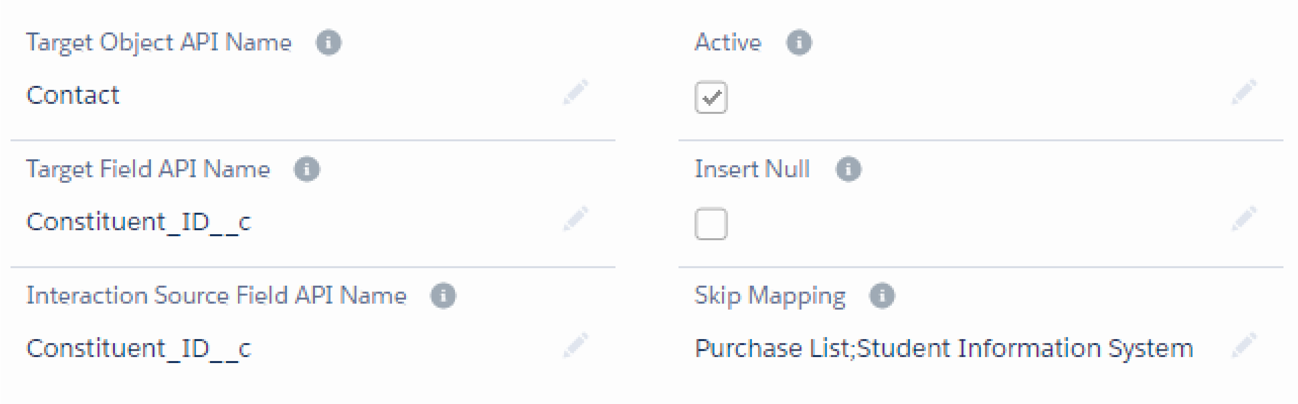


# Interaction Mappings (cont.)

## Skip Mapping and Interaction Sources

These records do more than just write to fields; they can also be skipped for particular sources. So far, we've mostly covered entering Interactions manually. However, Interactions can also be created via integrations with other systems, mass uploads, or other automated methods. Some of these external sources are more reliable than others, so Interaction Mappings allows the administrator to customize from which sources the value in a certain field overwrites a value in the field it is mapped to. This is controlled via a multi-select picklist in Interaction Mappings called "Skip Mapping." Selected sources on the list ignore the field's mapping so that the existing value in the field cannot be overwritten.

For example, CU has a field for each student's ID number. Only one of their integration sources and manual entry are considered accurate sources for the ID field on the Contact record. Therefore, the Interaction Mapping record would have all the sources selected in the "Skip Mapping" field except the name of the one reliable integration source and "Manual Entry."



# Interaction Mappings (cont.)

**Insert Null**

Normally, Interaction Mapping records will not overwrite an existing value on a target object's field with a blank value from an Interaction record. However, Insert Null is a checkbox on Interaction Mappings that does allow a blank or "null" value to be passed from a source field on an Interaction to its target field. There are a variety of reasons why an administrator would choose to check this box.

**Note:** For both Skip Mapping and Insert Null, remember to check with your administrators to find out which Interaction Mappings have these settings enabled and what you should expect.

# Reports and Dashboards

The Interactions Package comes out-of-the-box with some new report types, sample reports, and sample dashboards for recruiters and administrators. We will only cover the new Recruiter Dashboard in this section. See the Installation and Configuration Guide for reports and a dashboard specific to admins.

## New Report Types

The new report types are:

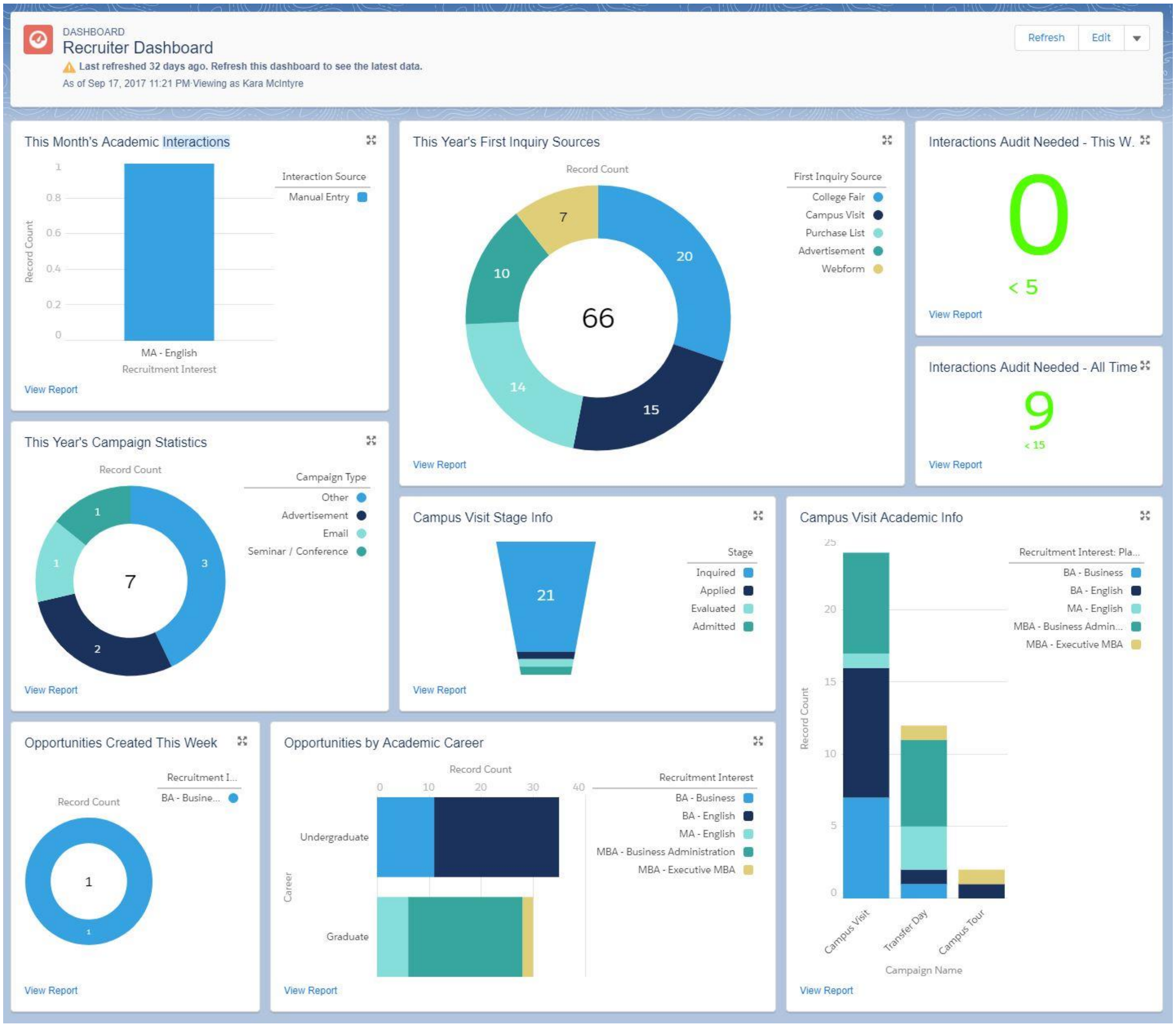
| REPORT TYPE NAME | OBJECTS (in order of primary, secondary, and/or tertiary) | REPORT TYPE CATEGORY | SAMPLE REPORT NAME(S) AND USE CASE EXAMPLE |
|---|---|---|---|
| CAMPAIGNS WITH CONTACTS WITH OPPORTUNITIES | Campaigns, Contacts, Opportunities | Campaign | This report type can be used to bring in data from Campaigns, Contact, and Opportunities. The sample report "Campus Visit Academic Info" allows recruiters to quickly see Campaign Member's academic interest information per Campus Visit Campaign along with Campaign Member's Contact information. |
| CONTACTS WITH OPPORTUNITIES | Contacts, Opportunities | Accounts & Contacts | This report type shows only Contacts with Opportunities. The sample report "Opportunities Stage Pipeline" shows all Opportunities and their stages. The details of the report provide the recruiter with the prospective student's Contact information. |

To learn more about creating your own custom report types, see the Set Up a Custom Report Type documentation in Salesforce help.

# Reports and Dashboards (cont.)

## Recruiter Dashboard

The Recruiter Dashboard is specifically designed with the recruiter in mind with graphics like “This Month’s Academic Interactions,” “Opportunities Created This Week,” and many others! Check it out:



# Campaign and Affiliation Considerations

## Campaigns

To ensure that Campaigns work correctly with the Interactions code, there are two things Campaign-creating users need to know:

### Campaign Member Statuses

When setting up a Campaign that has its Campaign Members created via Interactions, the Campaign Member Status indicated on the Interaction must match a Campaign Member Status in the Campaign. If a new value needs to be added to the Campaign Member Status picklist field on Interactions, reach out to your administrator for help. To learn more about setting up Campaigns, see Salesforce's Campaign Management Implementation Guide.

### Campaign Active Checkbox

To add a Campaign on an Interaction record via either of the Campaign lookup fields, the Campaign must have its Active checkbox field set to true, or checked. If a Campaign does not have the Active checkbox checked, it will not be searchable via the Campaign lookup fields.

## Affiliations

The Interactions Package leverages native HEDA functionality to create Affiliations. Check out HEDA's Create Accounts and Affiliations module in Trailhead to learn more about Affiliation records.

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# Frequently Asked Questions

Have more questions? Visit our FAQ page for some more information about the Package.

Additionally, join our Power of Us Hub Chatter group for updates on the Package, documentation and other resource documents, and to connect with others using Interactions for Student Recruitment.

## Other Resources

[GitHub: Interactions for Student Recruitment]

[Production Installation URL]

[Sandbox Installation URL]

## Credits

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