UNIVERSITY OF MIAMI

Interactions for Student Recruitment

OVERVIEW

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.

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Interactions Package Features

The Interactions Package delivers tools to manage your student recruitment processes and data. Not only does the package help to make the end user's job easier, it also provides the administrator with the tools to leverage the package effectively.

The package includes features such as:

- Interactions custom object and staging table

- Interaction Mappings custom object

- Interaction entry methods

- The ability to support two different recruitment models: Centralized and Decentralized

- Recruitment through Application Opportunity Pipelines

- Leveraging the Higher Education Data Architecture (HEDA)

- Utilizing Duplicate Management for Leads and Contacts

The Interactions Object

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, Interactions provide a log of every point of contact a prospective student has had with your university.

But that's not all! The Interactions object also serves as a staging table where data saved to an Interaction can be written to other records, such as Leads or Contacts. The Interactions package comes equipped with powerful code designed to make your recruiters' (and administrators') jobs easier and more efficient.

With a single interaction, you can:

- Convert an existing Lead record into a Contact

- Create or update two Campaign Members

- Create or update a Contact

- Create or update an Opportunity

- Create or update an Affiliation

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, Campaign Members, and Affiliations). For every field that needs to be written to a field on a particular object, an Interaction Mapping record needs to be created.

This makes the administrator's job much easier when it comes to setting up new fields without ever having to go into the code. Additionally, Interaction Mappings come with some built-in settings to customize how a value in an Interaction field is mapped to its target field on another object.

Interaction Mappings also supports mapping fields from Leads to Interactions when an Interaction is used to convert a Lead. This prevents information from being lost on converted Leads during the Interaction process and allows those fields to be mapped directly to other supported objects.

Interaction Entry Methods

Interaction records can be created both manually and via integrations or other data loading processes. The package comes with a few custom action buttons for Leads, Contacts, Opportunities and Campaigns as well as a global action to make manual entry by recruiters or other end users quick and easy. The object-specific custom actions pre-populate most fields with data from the record so users do not have to re-enter every single value.

Supports Centralized and Decentralized Recruitment

A Centralized recruitment model is when a department or school/college at a university has a single-stream or general admissions process. This means that a student (regardless of the exact degree they wish to pursue) submits one application for general admission into the school or college. Decentralized recruitment requires a student to submit specific applications for any and each degree they want to pursue for admission, not only to the school or college but also to the degree's program.

The Interactions Package comes ready out-of-the-box to support one or both of these models via a custom Opportunity Key field. Opportunities (for recruitment) represent a potential or actual application of a student (Contact) for a particular Term. For more information on how the Key field is built and how to customize it for your business processes, see the Installation and Configuration Guide as well as the Technical Implementation Guide for the Interactions Package. The User Guide also provides in-depth examples for both models.

Opportunity Stage Pipeline

The full Opportunity Pipeline for recruitment starts at the point of inquiry when a student raises their hand in some way, such as registering for an event or calling an admissions office. It then tracks the Contact's progress through the Inquiry level stages to the Applicant level stages. Out-of-the-box, the Package includes two page layouts, Inquiry and Applicant, to support the creation of two record types and sales processes (a set of Stages representing the recruiting process). This way, users and administrators can easily distinguish between students who need help with the application process and those who still need the push to apply. Any and all parts of the pipeline may be updated manually or automated via an integration and customized to support your business processes.

The HEDA Connection

The Interactions Package natively leverages parts of the Higher Education Data Architecture (HEDA) including Affiliations, the HEDA Term object, and the HEDA Account Record Type model. Affiliations are junction object records between Contacts and Accounts (categorized by record types such as Educational Institutions or Business Organizations) that can be created via logging an Interaction. For more information about HEDA, visit the [Manage Your Higher Ed Data with HEDA](#) Trail.

Duplicate Management

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.

Customizable to Your Business Processes

The Interactions Package is a flexible, scalable solution for managing recruitment data in Salesforce for Higher Education institutions. Administrators: Check out the Installation and Configuration Guide and the Technical Implementation Guide to find out what components you can customize and best practices. Users: Check with your admin about custom specifications for your implementation.

Other Resources

[Power of Us Hub Chatter Group](#)

[Click here](#) to download the package from the Installation section of the ReadMe file on GitHub.

Credits

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