**Engagement Tab**

**Overview**

The engagement tab is your one-stop shop to view past and future meetings, accomplishments, and to-dos. Watch the video to the right for a quick overview of how to view and manage each student's "timeline."

On this page you'll find information on the following:

* [Creating a Task](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Engagement-Tab.aspx#creating-a-task)​​​​​​​
* [Emailing within Salesforce](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Engagement-Tab.aspx#emailing-within-salesforce)
* [Contact Attempts](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Engagement-Tab.aspx#contact-attempts)
* [Adding a Meeting](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Engagement-Tab.aspx#adding-a-meeting)

**Creating a Task**

* Click on the box that says "Create new" to open up the new task window
* **What to enter**:
  + Subject
    - Click in the box to choose a common service from the dropdown, or type in your own task
  + Assigned To
    - Tasks you create will default to being assigned to you. If you need to assign the task to someone else, delete yourself and search for that person's name
  + Due Date
    - Choose the date by which this task needs to be completed
  + Priority
    - This field is optional
    - You can choose high priority if it would help you manage your own work (this will show on the [Tasks Tab](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#tasks-tab))
  + Status
    - Tasks will default to "Not Started"
    - In Progress: some work has been done on this task but it is not yet complete
    - Completed: the task has been fully accomplished
    - Not Pursued: this task does not apply to this student
  + Related To
    - Do not edit this field; this is what tells Salesforce the task belongs on this student's profile
  + Comments
    - This field is optional
    - Feel free to write any additional details that would be helpful for you to remember​​​​​​​

**Emailing within Salesforce**

* You can choose to email your students directly from Salesforce!
  + Pros: you have a record in Salesforce that you e-mailed them, and if you're lucky, the student's email server will let you see when the e-mail was opened (see below)
  + Cons: you have to start typing the student's email address to find it, and your e-mail signature isn't automatically included

**Contact Attempts**

* Logging a contact attempt shows that the advisor, called, texted, or e-mailed a student in order to attempt to get in contact or schedule a meeting
* Recommendation: you do not need to use it to capture every time you send a Calendly link to any student, but do log attempts to reach unresponsive students to have that information on record
* **WHY:**In conversations with advisors over the past few years, we've noticed that every single one of them had been tracking their attempts to contact unresponsive students using a shadow tracker, so this feature has been adapted into Salesforce. We use contact attempts to ensure that we are doing everything we can to re-engage students we haven't heard from in a while. Before we choose to make a student Inactive and take them off of an advisor's caseload, the student must have been unreachable for at least a full academic year. We know that sometimes students have something come up in their lives that makes them more hesitant to call us, and that our patience and persistence is key to re-engaging those students so they can continue making progress toward their degree.
* **What to enter**:
  + Click on "Log Contact Attempt" and indicate the attempt method (i.e. call, text, e-mail, etc.)
  + Add additional comments if that's helpful to you
  + Salesforce assumes the attempt was made today
* *Note: all contact attempts will show as a "call" on the student's timeline (with the phone icon, below.) Don't worry about this! As long as you indicate the contact method, your work has been saved correctly.*

**Adding a Meeting**

* The "Add a Meeting" button is one of two ways to log meetings with students; see the Meetings Overview page for more information
* **What to enter**:
  + Subject
    - You can leave the subject as "Student Meeting" or change it to be more descriptive if that's helpful for you
  + Description
    - This field is optional; add context if that's helpful to you
  + Start & End Date and Time
    - Make sure the date matches the date of your meeting
    - Because this part is not connected to Outlook, you don't need to worry about the start or end times
  + Assigned To
    - Salesforce is assuming you are the person who had this meeting