



# Interactions for Student Recruitment

INTERACTIONS INSTALLATION AND  
CONFIGURATION 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.

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# Audience

This document is intended for System Administrators and Developers to successfully implement Interactions for Student Recruitment. Review the list of basic administrator skills needed to install and configure the package. If you are unsure of some of the tasks, consider completing the [Admin Beginner](#) trail in Trailhead and reviewing Salesforce's other documentation.

## List of skills needed:

- Install packages
- Manage applications
- Manage object fields and relationships
- Manage record types
- Understanding of Salesforce Duplicate Management



# About the Lightning Experience Interface

Salesforce has two different user interfaces: Lightning Experience and Salesforce Classic.

Interactions for Student Recruitment gives you Lightning Experience out-of-the-box via the Interactions Lightning Console App and other Lightning-specific customizations. Navigation tips for the Interactions App is provided in the [Navigating the Interactions App](#) section.

This guide assumes that you are working in Lightning Experience. You can learn more about this interface in the [Lightning Experience Basics](#) Trailhead module.

# Overview of Interactions for Student Recruitment

Interactions for Student Recruitment helps you make the most of your recruiting processes by utilizing the great standard technology Salesforce provides along with some exciting new features.

No more tracking prospects on spreadsheets and post-it notes, or wondering which marketing efforts are the most successful in recruiting the best students. Interactions for Student Recruitment puts the power in your hands with a complete recruitment solution for the recruiters and marketing teams at your university!

The Interactions custom object, the centerpiece of this package, serves as a staging table that automates the matching and creation of records specifically built for student recruitment. Whether Interactions are created through an integration or manually, the results are the same: existing records are updated and new records are created by simply logging a single Interaction!

We strongly recommend you review the [User Guide](#) if you haven't already. The User Guide shows how the standard and custom objects used in the package work together and uses real-world examples to demonstrate how automation can help recruiters at your university.



# Custom Fields on Standard Objects

It is important to note the new fields on Salesforce Standard objects before installing Interactions for Student Recruitment. Refer to the “Overview of the Interactions Package” and “Standard Objects Used” sections of the [User Guide](#) for information on each standard object with notes on the new custom fields.



**Note:** This section will only touch on fields that are especially important to understand as an administrator.

For a complete list of all the fields included in the package (for all objects) including their help text, values for picklist fields and much more, see the [Data Dictionary](#).

## Leads and Contacts

- “Constituent ID”
  - Added to both the Lead and Contact objects
  - An ID field for integration or manual data loading purposes
  - It can also be used in Duplicate Matching rules (see [Create Duplicate and Matching Rules](#))
  - Not delivered on either object as unique or as an external ID field, but it can be configured that way after installing

# Custom Fields on Standard Objects (cont.)

## Opportunities

- “Application Number”
  - An ID field used for housing an identifying Application number
  - Not delivered as unique or as an external ID field, but it can be configured that way after installing
- “Application Submitted Date”
  - A date field that displays the date the Opportunity went from the Inquiry to Applicant record type, updated by a workflow rule
  - This field may also be updated manually or via an integration
- “Opportunity Key”
  - A calculated text field that is used to determine whether an Interaction will create a new Opportunity or update an existing Opportunity record
  - Built out-of-the-box using the Contact’s 18-digit ID, Career, Term’s 18-digit ID, and Plan’s 18-digit ID (if applicable) to ensure it is unique and supports both a centralized and decentralized business process
  - Delivered as a unique external ID field
  - Learn more about this field in [The Opportunity Key](#)

# Custom Fields on Standard Objects (cont.)

## Campaigns and Campaign Members

- “Campaign Key”
  - Added to the Campaign object
  - Can be used to set a custom external ID field for integrations
  - If it is populated, the Interaction Processor code will use it to match to a Campaign and create Campaign Member records instead of the standard Salesforce ID
  - Delivered as a unique external ID field
- “Campaign Member Key”
  - Added to the Campaign Member object
  - Set to Lead ID + Campaign ID and updated via workflow
  - The Interaction Processor code will use it to update existing Campaign Members instead of creating new records
  - Delivered as a unique external ID field

## The HEDA Component

Out-of-the-box, Interactions for Student Recruitment leverages standard Salesforce functionality as well as 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 (for example, Educational Institutions or Business Organizations) that can be created by logging an Interaction. The package uses the HEDA Term object to segment Interactions and Opportunities (this can be setup in a variety of ways). It also utilizes HEDA Account Record Types to create a meaningful data model.

If you are not familiar with HEDA, complete the [Manage Your Higher Ed Data with HEDA](#) trail in Trailhead and review other relevant HEDA documentation to learn the basics.

# How Interactions Function - The Interaction Models

Each Interaction record that is created has the potential to:

- Convert an existing Lead record into a Contact
- Create or update up to two Campaign Members
- Create or update a Contact
- Create or update an Opportunity
- Create or update an Affiliation

But how does this auto-magic happen? By using the custom code in Interactions for Student Recruitment called the Interaction Processor.

When an Interaction is logged, the Processor searches for any existing Lead or Contact records via Lead and Contact Matching Rules. If existing records are found, they are updated (as applicable), and new records are created if no records exist.

Depending on other data provided on the Interaction (e.g. Recruitment Interest and Term, Affiliated Account data, and/or Campaign and Campaign Member Status), other related records may be created or updated (e.g. an Opportunity, Affiliation, and/or Campaign Membership, respectively).

## How Interactions Function - The Interaction Models (cont.)

We have included two Interaction models in the documentation to demonstrate when and which records are being created or updated when a new Interaction record is saved, including the other objects and processes involved (such as Duplicate Management and Lead Conversion).

These models can be found in the [User Guide](#) and in the [Appendix](#) of this guide. Take a moment to review the models if you have not seen them already.



**Note:** We discuss best practices for setting up Duplicate Management and how it comes out-of-the-box in the [Create Duplicate and Matching Rules](#) section later on.

## Apex Classes and Other Metadata

A list of all Apex Classes and Triggers as well as all other metadata components included in Interactions for Student Recruitment are available in the [Data Dictionary](#). Visit the [Technical Implementation Guide](#) for additional information on how the code functions and tips on customization.



# Requirements Before Installing

Before installing Interactions for Student Recruitment, there are a few steps you need to follow to ensure your org is ready to have the package installed. Once you are ready, you can install the package from one of the links in the [GitHub Repository](#).

## Salesforce Edition

Interactions for Student Recruitment requires an Enterprise or Unlimited edition of Salesforce.

## Install the Higher Education Data Architecture (HEDA)

Interactions for Student Recruitment uses the Higher Education Data Architecture (HEDA) and references it in the Interactions Processor code. Therefore, to simply install the package from the link above, you must have HEDA installed in your org first. See the [Install and Configure the Higher Education Data Architecture \(HEDA\)](#) Knowledge Article for step-by-step instructions on installing HEDA.

Although HEDA is required to install the package, the components of the package are also available as open-source code through GitHub. The repository for Interactions for Student Recruitment is [here](#). You will need a developer who is familiar with Apex code and implementing open-source solutions to go this route. See the [Technical Implementation Guide](#) for more information about the code.



# Installer Permissions for Interactions

The user who installs Interactions for Student Recruitment must have certain permissions, which are typically already part of the System Administrator profile. If a non-administrator needs these permissions, enable them using either profiles or permission sets.

## Permissions needed:

- ‘Create’ permission for the Account object
- ‘Create’ permission for the Contact object
- ‘Create’ permission for the Campaign object
- ‘Marketing User’ selected on the User Detail page
- ‘Download AppExchange Packages’ permission

If you’re new to managing user permissions, we recommend reviewing the [Data Security](#) module in Trailhead before continuing.

## Field Limits

Interactions for Student Recruitment introduces several unique external ID fields. Compare your org with the table below to ensure that installing the package will not exceed per-object limits and prevent installation.

Note that only the fields that must be configured as unique external IDs for Interactions to work come out of the box as such. We recommend the other fields in this table be unique external ID's as well but this is not a requirement for Interactions to function as expected.



**Note:** Each object has a limit of 7 external IDs.

Object	Field Name	Delivered as an External ID?	Delivered as a Unique Field?
Interaction	Interaction Upsert Key	X	X
Opportunity	Opportunity Key	X	X
Opportunity	Application Number		
Contact	Constituent ID		
Lead	Constituent ID		
Campaign	Campaign Key	X	X
Campaign Member	Campaign Member Key	X	X

## Multiple Lookups to the Same Objects

The package includes lookup fields that may create multiple relationships between objects. See the notes column in the table on the next page for more information about each field's purpose so you understand the difference between them and are able to identify them.

The Object column describes where the lookup field was built. The Related Object is what the lookup field is connected to. The Related List Label references the related list that appears on the Related Object. Most of the table references Academic Interests vs Recruitment Interests, which are both a type of record from the new Plan object.

See the [User Guide](#) for more information about this object.



**Note:** The ability to differentiate these fields and relationships will be especially important for reporting as well as UI configuration, such as editing page layouts.

# Multiple Lookups to the Same Objects (cont.)

Object	Field Name	Related Object	Related List Label	Notes
Interaction	Academic Interest	Plan	Interactions with Academic Interest	Used in the Opportunity Key for graduate plans. Includes lookup filter Plan: Type = Academic.
Interaction	Recruitment Interest	Plan	Interactions with Recruitment Interest	Used in the Opportunity Key for graduate plans. Includes lookup filter Plan: Type = Recruitment.
Plan	Recruitment Interest	Plan	Academic Interests	Connects Academic Interests to a parent Recruitment Interest. Includes lookup filter Plan: Type = Recruitment. The field appears on the Academic Interest plan layout, the related list is on the Recruitment Interest layout.
Opportunity	Academic Interest	Plan	Opportunities with Academic Interest	Used in the Opportunity Key for graduate plans. Includes lookup filter Plan: Type = Academic.
Opportunity	Recruitment Interest	Plan	Opportunities with Recruitment Interest	Used in the Opportunity Key for graduate plans. Includes lookup filter Plan: Type = Recruitment.
Lead	Recruitment Interest	Plan	Leads with Recruitment Interest	Includes lookup filter Plan: Type = Recruitment.
Opportunity	Affiliated Account	Account	Opportunities (Affiliated Account)	Affiliated Account is used to connect the Opportunity to an Educational Institution or Business Organization using Interaction Mappings. The standard Account lookup is set to the Administrative Account of the Contact.
Opportunity	Contact	Contact	Recruitment Opportunities	There is a standard Related List on Contact called "Opportunities" that is based on the Contact Roles junction object. This Contact lookup field provides a more direct connection between Contacts and Opportunities.



# Add Contact Role Value

For Campaign Influence and other types of Campaign and Opportunity reporting to work properly, you will need to add a value of “Opportunity Contact” to Contact Roles on Opportunities.

**Follow the steps below to add the new value:**

1. Go to **Setup > Feature Settings > Sales > Contact Roles on Opportunities**
2. Select the **New** button

Picklist Edit

## Opportunity Contact Role

Below is the master list of picklist values for the Opportunity Contact Role field.

Click Edit to change the name of the value or make it the default value. Click New to add a value to the picklist. Click Reorder to c

Opportunity Contact Role Picklist Values		New	Reorder	Replace	Printable View	Chart Colors ▾
Action	Values	API Name	Default	Chart Colors		
Edit   Del   Deactivate	Business User	Business User	<input type="checkbox"/>	Assigned dynamically		
Edit   Del   Deactivate	Decision Maker	Decision Maker	<input type="checkbox"/>	Assigned dynamically		

3. Enter ‘Opportunity Contact’ and click **Save**

Add Picklist Values

## Opportunity Contact Role

Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.

If a value matches an inactive value's API name, that value is reactivated with its previous label.

If a value matches an inactive value's label but not the API name, a new value is created.

Opportunity Contact

Save Cancel

## Add Contact Role Value (cont.)

4. Edit the new value ‘Opportunity Contact’

[Edit](#) | [Del](#) | [Deactivate](#)   [Opportunity](#) [Contact](#)      [Opportunity](#) [Contact](#)         [Assigned](#)

5. Make the new value the default and click **Save**

Label	<input type="text" value="Opportunity Contact"/>
API Name	<input type="text" value="Opportunity Contact"/> <a href="#">i</a>
Default	<input checked="" type="checkbox"/> Make this value the default for the master picklist
Chart Color	Assigned dynamically 

# Creating Opportunity Record Types, Stages, and Sales Processes (recommended)

Interactions for Student Recruitment includes two Opportunity page layouts to help you track separate recruitment and application processes and switch between the two. These page layouts and business processes are meant to be assigned to two record types, which are in turn related to two sales processes.

The record types and sales processes are not included in the package nor are they required, but they are recommended to help you make the most of recruiting in Salesforce. The [User Guide](#) and other documentation assumes you will complete these steps.

Follow the steps in the following sub-sections to configure these customizations based on our best practices. Otherwise, skip to the [Installation Steps](#) section.

## Add Opportunity Stage Values

The below Stage values are suggested as a starting point, but you can set these to be any value to meet your own recruitment and application processes. The important thing is to have Stage values for inquiries and applicants so you can create the Sales Processes in the next step.

### Add Stage values:

1. Go to **Setup > Object Manager > Opportunity > Fields & Relationships**
2. Find the “Stage” field and click on the name (do not click Edit)
3. Click the **New** button in the Opportunity Stages Picklist Values section

# Creating Opportunity Record Types, Stages, and Sales Processes (cont.)

## Add Opportunity Stage Values (cont.)

4. Add at least one ‘Open’ value for Inquiry Opportunities and click **Save** (use the following as an example):
  - “Stage Name” = Inquired
  - “Probability” = 10 (or whatever value you believe is appropriate)
  - “Type” = Open
  - “Forecast Category” = Pipeline
5. Add at least one ‘Closed’ value for Inquiry Opportunities and click **Save:**
  - “Stage Name” = No Longer Interested
  - “Probability” = 0
  - “Type” = Closed/Lost
  - “Forecast Category” = Omitted
6. Add at least one ‘Open’ value for Applicant Opportunities and click **Save:**
  - “Stage Name” = Applied
  - “Probability” = 60 (or whatever value you believe is appropriate)
  - “Type” = Open
  - “Forecast Category” = Pipeline
7. Add at least one ‘Closed’ value for Applicant Opportunities and click **Save:**
  - “Stage Name” = Enrolled
  - “Probability” = 100
  - “Type” = Closed/Won
  - “Forecast Category” = Closed

# Creating Opportunity Record Types, Stages, and Sales Processes (cont.)

## Add Opportunity Stage Values (cont.)

- Other examples of Stages that could be useful are shown in the

Sales Process	Stage Name	Probability	Type	Forecast Category
Inquiry	Confirmed Interest	20	Open	Pipeline
Applicant	Evaluated	70	Open	Pipeline
Applicant	Admitted	90	Open	Pipeline
Applicant	Deposit Received	95	Open	Pipeline
Applicant	Withdrawn	0	Closed/Lost	Omitted
Applicant	Denied	0	Closed/Lost	Omitted

- If you want to delete any Stage values that were included in your org by default, you can do so on the Stage field's page by clicking **Delete** next to each Stage you want to remove and choosing what value to replace the Stage with.



**Note:** Be careful when deleting stages you are using in your system. This process will replace any values found on your Opportunities with the value you choose.



# Creating Opportunity Record Types, Stages, and Sales Processes (cont.)

## Add Opportunity Stage Values (cont.)

10. To adjust the order the Stages will appear, go back to the Stage field's page and click **Reorder** next to the **New** button. The best way to sort is from the earliest possible Stage at the top to the last possible Stage at the bottom. Here is what the order should be if you added all our suggested Stages:

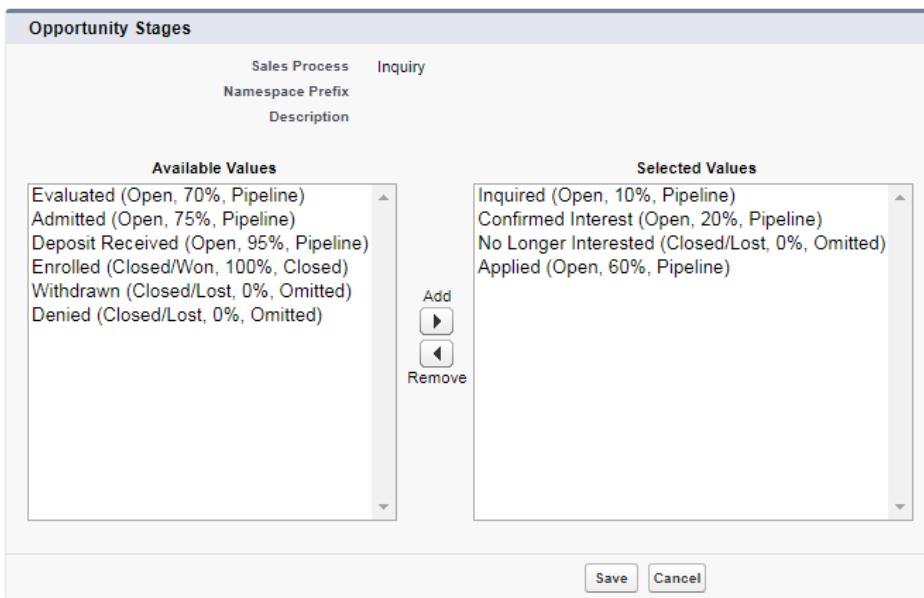
- Inquired
- Confirmed Interest
- No Longer Interested
- Applied
- Evaluated
- Admitted
- Deposit Received
- Enrolled
- Withdrawn
- Denied

Opportunity Stages Picklist Values					
Action	Stage Name	API Name	Type	Probability	Forecast Category
Edit   Del   Deactivate	Inquired	Inquired	Open	10%	Pipeline
Edit   Del   Deactivate	Confirmed Interest	Confirmed Interest	Open	20%	Pipeline
Edit   Del   Deactivate	No Longer Interested	No Longer Interested	Closed/Lost	0%	Omitted
Edit   Del   Deactivate	Applied	Applied	Open	60%	Pipeline
Edit   Del   Deactivate	Evaluated	Evaluated	Open	70%	Pipeline
Edit   Del   Deactivate	Admitted	Admitted	Open	75%	Pipeline
Edit   Del   Deactivate	Deposit Received	Deposit Received	Open	95%	Pipeline
Edit   Del   Deactivate	Enrolled	Enrolled	Closed/Won	100%	Closed
Edit   Del   Deactivate	Withdrawn	Withdrawn	Closed/Lost	0%	Omitted
Edit   Del   Deactivate	Denied	Denied	Closed/Lost	0%	Omitted

# Creating Opportunity Record Types, Stages, and Sales Processes (cont.)

## Add Opportunity Inquiry Stage Process

1. Go to **Setup > Feature Settings > Sales > Sales Processes**
2. Click **New** and set the following values:
  - “Existing Sales Process” = --Master--
  - “Sales Process Name” = Inquiry
3. Move your Inquiry stages from the left column to the right and click **Save**. If you used the suggested values, it should look like this:



The screenshot shows the "Opportunity Stages" configuration screen. At the top, it displays the "Sales Process" as "Inquiry", "Namespace Prefix" as "", and "Description" as "". Below this, there are two columns: "Available Values" and "Selected Values". The "Available Values" column contains a list of opportunity stages: Evaluated (Open, 70%, Pipeline), Admitted (Open, 75%, Pipeline), Deposit Received (Open, 95%, Pipeline), Enrolled (Closed/Won, 100%, Closed), Withdrawn (Closed/Lost, 0%, Omitted), and Denied (Closed/Lost, 0%, Omitted). The "Selected Values" column contains: Inquired (Open, 10%, Pipeline), Confirmed Interest (Open, 20%, Pipeline), No Longer Interested (Closed/Lost, 0%, Omitted), and Applied (Open, 60%, Pipeline). Between the two columns are "Add" and "Remove" buttons. At the bottom of the screen are "Save" and "Cancel" buttons.

**Note:** The first value of the Applicant Sales Process (“Applied”) is shown here as part of the Inquiry Sales Process. This is so staff members can manually move Opportunity records from inquiry to applicant. If only an integration tool or the Interaction Processor should be able to make this transition, exclude “Applied” from this list. This allows you to protect your stages if you are using a separate database or process to collect applications.





# Creating Opportunity Record Types, Stages, and Sales Processes (cont.)

## Add Opportunity Applicant Stage Process

1. Go to **Setup > Feature Settings > Sales > Sales Processes**
2. Click **New** and set the following values:
  - “Existing Sales Process” = --Master--
  - “Sales Process Name” = Applicant
3. Move your Applicant stages from the left column to the right and **Save**.  
If you used the suggested values, it should look like this:

Opportunity Stages	
Sales Process	Applicant
Namespace Prefix	
Description	
<b>Available Values</b>	
Inquired (Open, 10%, Pipeline)	
Confirmed Interest (Open, 20%, Pipeline)	
No Longer Interested (Closed/Lost, 0%, Omitted)	
	<b>Add</b>
	<b>Remove</b>
<b>Selected Values</b>	
Applied (Open, 60%, Pipeline)	
Evaluated (Open, 70%, Pipeline)	
Admitted (Open, 75%, Pipeline)	
Deposit Received (Open, 95%, Pipeline)	
Enrolled (Closed/Won, 100%, Closed)	
Withdrawn (Closed/Lost, 0%, Omitted)	
Denied (Closed/Lost, 0%, Omitted)	
<b>Save</b> <b>Cancel</b>	

**Note:** Including only Applicant stages allows you to protect the stages and prevent someone from accidentally moving an Opportunity back to an Inquiry stage. You can also protect the stages by making Stage ‘Read Only’ on the Applicant Opportunity Page Layout, if the application process is managed by another database or updated only by the Interaction process.

# Creating Opportunity Record Types, Stages, and Sales Processes (cont.)

## Add Opportunity Inquiry Record Type

1. Go to **Setup > Object Manager > Opportunity > Record Types > New**
2. Set the following values:
  - “Existing Record Type” = --Master--
  - “Record Type Label” = Inquiry Opportunity
  - “Record Type Name” = Inquiry\_Opportunity (this value should fill-in automatically)
  - “Sales Process” = Inquiry
  - “Active” = checked
  - Select ‘Enable for Profile’ checkboxes for each Profile that will have access to create Inquiry Opportunities
  - Select ‘Make Default’ checkboxes for all enabled Profiles
3. Click the **Next** button and then click **Save** on the next page (you will assign the “Inquiry Opportunity” page layout to the record type after installing the package)
4. Once you save, you will be taken to the Inquiry Record Type page, where you can edit picklists to include values specific to that record type, if applicable.



# Creating Opportunity Record Types, Stages, and Sales Processes (cont.)

## Add Opportunity Applicant Record Type

1. Go to **Setup > Object Manager > Opportunity > Record Types > New**
2. Set the following values:
  - “Existing Record Type” = --Master--
  - “Record Type Label” = Applicant Opportunity
  - “Record Type Name” = Applicant\_Opportunity (this value should fill-in automatically)
  - “Sales Process” = Applicant
  - “Active” = checked
  - Select ‘Enable for Profile’ checkboxes for each Profile that will have access to create Applicant Opportunities
  - Leave all ‘Make Default’ checkboxes unchecked
3. Click the **Next** button and then click **Save** on the next page (you will assign the “Applicant Opportunity” page layout to the record type after installing the package)
4. Once you save, you will be taken to the Applicant Record Type page where you can edit picklists to include values specific to that record type, if applicable.

# Creating Opportunity Record Types, Stages, and Sales Processes (cont.)

## Create an Opportunity Workflow Rule

This recommended workflow rule ensures an Opportunity is set to the correct record type based on the Stage. In this way, when a new Opportunity is created with an ‘Applicant’ value or the Stage moves from an ‘Inquiry’ value to an ‘Applicant’ value, the record type is updated (since any Profiles with access to create Opportunities should have their default record type set to Inquiry Opportunity).

### Follow these steps:

1. Go to **Setup > Process Automation > Workflow Rules**
2. Click **New Rule** and select ‘Opportunity’ from the “Select Object” picklist
3. Click **Next**, then set the following values:
  - “Rule Name” = Opportunity: Set Applicant Record Type
  - “Evaluate the rule when a record is” = created, and every time it’s edited
  - “Run this rule if the following” = criteria are met
    1. Opportunity: Stage **not equal to** Inquired, Confirmed Interest, No Longer Interested
    2. Opportunity: Opportunity Record Type **not equal to** Applicant Opportunity

 **Note:** In the above criteria, the “Opportunity: Stage” values listed include all stages in the Inquiry Sales Process, except ‘Applied’ which is technically an applicant stage. In this example, we are using our suggested Inquiry stages, but you should use all values you have added to the Inquiry Sales Process.

# Creating Opportunity Record Types, Stages, and Sales Processes (cont.)

## Create an Opportunity Workflow Rule (cont.)

4. Click **Save & Next**, then select ‘New Field Update’ from the “Add Workflow Action” picklist, and set the following values:
  - “Name” = Record Type: Set to Applicant
  - “Unique Name” = Record\_Type\_Set\_to\_Applicant (this value should fill-in automatically)
  - “Object” = Opportunity
  - “Field to Update” = Opportunity Record Type
  - “Re-evaluate Workflow Rules after Field Change” = unchecked
  - “Opportunity Record Type” = Applicant Opportunity (or whatever the name of your Applicant record type is)
5. Click **Done**, then click on the Workflow Rule (Opportunity: Set Applicant Record Type) linked in the Rules Using this Field Update section and click **Activate** to turn on the rule

# Installation Steps

## Downloading the Unmanaged Package

Interactions for Student Recruitment has been created as an unmanaged package for easy installation. You can find the package links in the [GitHub Repository](#).

It is also listed in a GitHub repository, described in the next section.

**Follow the steps below to download the package from one of the URL's:**

1. Sign into the org where you want to install the package
2. Click on the installation URL above for the type of org you are installing the package into
3. Select either 'Install for Admins Only,' 'Install for All Users,' or 'Install for Specific Profiles,' depending on which profiles you would like to be granted security access to all the components included in the package
4. Click the **Install** button and wait for the installation process to be completed
5. If you see the message "This app is taking a long time to install," click the **Done** button and wait to receive an email letting you know the process has been completed
6. You should now be able to see the package by going to **Setup > Apps > Installed Packages**



# Installation Steps (cont.)

## Using the GitHub Open-Source Code

The components of the package can also be downloaded from the GitHub repository [here](#). If the package cannot be installed because you will not be using HEDA or there is another issue preventing you from installing it as-is, you can download the open-source files, make adjustments, and install it using a deployment tool like the [force.com IDE](#) or the [force.com Migration Tool](#).

**These are the minimum skills needed to install using this method:**

- Programming experience
- Basic understanding of metadata and how to work with it
- Ability to understand and modify Apex code
- Experience using Eclipse (for the Force.com IDE) or ANT (for the Force.com Migration Tool)



**Note:** Changing the source code before deploying it could break certain functionality. Please read the [Technical Implementation Guide](#) and any HEDA documentation to make sure you have a clear understanding of what this package does and how your changes could affect it.

# Requirements After Installing

Once you have installed Interactions for Student Recruitment, you will need to complete some manual updates and customizations for Interactions to work as expected. You can also take this as an opportunity to customize these aspects of the package to better fit your business processes.

## Load Interaction Mappings

Interaction Mapping records determine how the code copies data from the Interaction records to other records in Salesforce, on a field-by-field basis. For more technical information about Interaction Mapping records, see the Interaction Mappings section of the [Technical Implementation Guide](#).

Interaction Mappings also supports mapping fields from Leads to Interactions when an existing Lead is found for an Interaction. 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, like Contacts, Opportunities, Affiliations, or Campaign Members.

An Interaction Mapping record must be created for every source-to-target field mapping desired. An Excel file containing suggested Interaction Mapping records (as well as other sample data) has been created for the package based on the included fields.

**Follow these steps to import these records using the Data Import Wizard:**

1. Download the Interactions Sample Data Excel file [here](#)
2. Open the file and create a separate CSV file with the Sample Interaction Mappings sheet of the Excel file
3. Go to **Setup > Data > Data Import Wizard**



## Load Interaction Mappings (cont.)

4. Click the green **Launch Wizard** button
5. Choose ‘Custom objects’ for the “What kind of data are you importing?” section and select the ‘Interaction Mappings’ object
6. In the “What do you want to do?” section, select **Add new records** and leave all dropdowns and checkboxes blank

A screenshot of the 'Import your Data into Salesforce' wizard. The first step, 'What kind of data are you importing?', shows 'Custom objects' selected. Under 'Interaction Mappings', there is a checked checkbox. The second step, 'What do you want to do?', shows 'Add new records' selected. The third step, 'Where is your data located?', shows a dashed box for dragging a CSV file, with a 'CSV' file icon below it.

Import your Data into Salesforce

You can import up to 50,000 records at a time.

Help for this page

What kind of data are you importing?

Standard objects Custom objects

Interaction Mappings

Interactions

Interactions Pre-Processing

Plans

What do you want to do?

Add new records

Match by:   
--None--

Which User field in your file designates record owners?   
--None--

Trigger workflow rules and processes?   
 Trigger workflow rules and processes for new and updated records

Where is your data located?

Drag CSV file here to upload

CSV

7. In the “Where is your data located?” section, select the CSV file from your computer, or drag and drop the file into the window and select **Next**
8. Map each column of the CSV file to its matching Interaction Mappings field (some may auto-map)
9. Select **Next** and review your import information
10. When you are finished reviewing, select **Start Import**
11. A pop-up will appear, click **OK** to see your Bulk Data Load Jobs

# Create New Fields and Mappings

Interaction fields can be mapped to fields on Leads, Contacts, Accounts, Affiliations, and Campaign Members. As mentioned previously, Lead fields can also be mapped directly to Interactions.

To add a new field to Interactions, follow these steps:

1. Go to **Setup > Object Manager > Interactions > Fields and Relationships**
2. Create your new field, taking note of the API Name
3. Go to **Setup > Object Manager > [the object the field should map to] > Fields and Relationships**
4. Create your new field or identify the existing field you want to map to, and take note of the API Name
5. Go to the **Interaction Mappings** tab and create a new record
6. Select the source object you are mapping from in the “**Source Object API Name**” picklist (in this case, ‘Interaction\\_c’)
7. Set the “**Source Field API Name**” field to the API name of the source object field you created or identified
8. Select the target object you are mapping to in the “**Target Object API Name**” picklist
9. Set the “**Target Field API Name**” field to the API name of the target object field you created or identified
10. Set the “**Active**” checkbox to checked
11. Include **additional functionality** like “Insert Nulls” or “Skip Mapping” as applicable



For more on Interaction Mapping advanced functionality, see [Configure Interaction Mapping Features](#) section of this guide and/or see the [Technical Implementation Guide](#))



# Create New Fields and Mappings (cont.)

## Interaction Mapping Errors

Each time an Interaction Mapping is created or edited, an Apex process included in the package queries Salesforce to check if the values in the “Source/Target Field API Name” are valid based on the “Source/Target Object API Name” selected, respectively.

In the following example, the “Target Field API Name” is misspelled:

### New Interaction Mapping

Review the errors on this page.

Target Field API Name 'TShirt\_Size\_\_c' does not exist on CampaignMember. Please choose a valid field to map to and ensure it is in API name format.

Information	
Active	<input checked="" type="checkbox"/>
Source Object API Name	i Interaction__c
Target Object API Name	i CampaignMember
Source Field API Name	i T_Shirt_Size__c
Target Field API Name	i TShirt_Size__c

Additionally, if the API Name of a field included in an Interaction Mapping is changed, the related Interaction Mapping will not work and will cause the Interaction process to error. Interactions for Student Recruitment does not include functionality preventing API Names from being changed, but standard Salesforce functionality will warn a user that the change could affect other processes. If the change is necessary, the Interaction Mapping must be updated afterward to prevent any issues.

# Configure Interaction Mapping Features

Interaction Mapping records contain two fields to enable additional functionality. See the Advanced Functionality of Interaction Mapping Records section of the [Technical Implementation Guide](#) for more information.

Interaction Mapping Field	Description
Insert Null	A checkbox indicating that if the source field listed on the mapping record is blank, it should overwrite the target field listed with a blank value. Primarily used for Checkbox fields.
Skip Mapping	A multi-select picklist listing possible Interaction Source values. If an Interaction record has an Interaction Source matching any of the selected values on the mapping record, the target field listed on the mapping record will not be written over by the value on the source field. For an example, see <a href="#">Using Interaction Source with Interaction Mappings</a> .

# Update Picklist Values

The package includes new picklists, multi-select picklists and values pushed into standard picklist fields. The values in those fields will need to be added to any record types not included with the package. For example, if your org has its own Opportunity record types and you want to use the Admit Type field, you will need to add the values for Admit Type to each of your record types.

**Follow these steps:**

1. Go to **Setup > Object Manager > Opportunity > Record Types**
2. Click on the name of the record type you want to update
3. Select **Edit** next to the “Admit Type” field
4. Add the values you want to move from the “Available” column to the “Selected” column
5. Click **Save**



**Note:** Use these same steps to edit the picklist options for other objects by going to **Setup > Object Manager > [Object] > Record Types**

See the [Data Dictionary](#) for a complete list of the picklist fields added with the package as well as the values added to existing picklists.

# Create Duplicate and Matching Rules

The Interaction process finds matching records in Salesforce by relying on system errors generated by Duplicate Rules and their Matching Rules. These errors include the Salesforce ID of the record found, and the Interaction process uses that ID to merge or update records. See the Duplicate Matching section of the [Technical Implementation Guide](#) for more information about the code.

Duplicate Rules and Matching Rules are difficult to move in a package, especially if you are currently using [Salesforce Duplicate Management](#), so they must be manually created and configured. Follow the steps in the following subsections to learn about the requirements for configuring Duplicate Management with this package.

## Create or Update Matching Rules

The Interaction Processor needs a Contact Matching Rule and a Lead Matching Rule with some specific formatting to work. If you already have Lead and/or Contact Matching Rules that are being used by a Duplicate Rule setup to ‘Block’ on Create or Edit, you will need to update your existing Matching Rules and Duplicate Rules to follow the format described here.



**Note:** Any Block Duplicate Rule that is triggered by the Interactions Processor could cause issues if the Duplicate Rule or Matching Rule is not formatted correctly.

# Create Duplicate and Matching Rules (cont.)

## Create or Update Matching Rules (cont.)

### Create Lead Matching Rule:

1. Go to **Setup > Data > Duplicate Management > Matching Rules**
2. Click **New Rule** then select ‘Lead’ from the Object dropdown and click **Next** or open and edit your existing Lead Matching Rule
3. Set the following values for Rule Details:
  - “Rule Name” = Interaction Lead Matching
  - “Description” = Leveraged by the Interaction process. The rule must be formatted exactly like this: (Your Matching Criteria) OR (Company, Exact, Match Blank TRUE AND (Your Matching Criteria))
4. Matching Criteria and Filter Logic (recommended)

**Matching Criteria**

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields
1. First Name	Fuzzy: First Name	<input type="checkbox"/>
2. Last Name	Exact	<input type="checkbox"/>
3. Email	Exact	<input type="checkbox"/>
4. Company	Exact	<input checked="" type="checkbox"/>
5. --None--	Exact	<input type="checkbox"/>

[Add Row](#) [Remove Row](#)

[Clear Filter Logic](#)  
[Filter Logic:](#)

`((1 AND 2 AND 3) OR (4 AND (1 AND 2 AND 3)))`

5. Click **Save** and then **Activate** the Matching Rule



**Note:** Overly-complicated criteria is not recommended and could be flagged by Salesforce and prevent activation.

# Create Duplicate and Matching Rules (cont.)

## Create or Update Matching Rules (cont.)

### Create Contact Matching Rule:

1. Go to **Setup > Data > Duplicate Management > Matching Rules**
2. Click **New Rule** then select ‘Contact’ from the Object dropdown and click **Next** or open and edit your existing Contact Matching Rule
3. Set the following values for Rule Details:
  - “Rule Name” = Interaction Contact Matching
  - “Description” = Leveraged by the Interaction process. The rule must be formatted exactly like this: (Your Matching Criteria) OR (Account Name, Exact, Match Blank TRUE AND (Your Matching Criteria))
4. Matching Criteria and Filter Logic (recommended)

**Matching Criteria**

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields
1. First Name	Fuzzy: First Name	<input type="checkbox"/>
2. Last Name	Exact	<input type="checkbox"/>
3. Email	Exact	<input type="checkbox"/>
4. Account Name	Exact	<input checked="" type="checkbox"/>
5. --None--	Exact	<input type="checkbox"/>

Add Row Remove Row

[Clear Filter Logic](#)

Filter Logic:  
`(1 AND 2 AND 3) OR (4 AND (1 AND 2 AND 3))`

5. Click **Save** and then **Activate** the Matching Rule

 **Note:** Any field included in the matching criteria must be mapped to the Contact using Salesforce [Lead Mappings](#) in setup on Leads. Any field included in the matching criteria must also be mapped from Interaction to Contact using an [Interaction Mapping](#) record.

# Create Duplicate and Matching Rules (cont.)

## Create or Update Duplicate Rules

If you already have a Lead Duplicate Rule or Contact Duplicate rule setup to Block on Create or Edit, the Interactions Processor can trigger it and cause errors if it is not formatted correctly. Instead of creating new rules (by following the steps below), you will need to update your existing ones to use the matching rules you just created/updated and the following settings.

### Create Lead Duplicate Rule:

1. Go to **Setup > Data > Duplicate Management > Duplicate Rules**
2. Click **New Rule** and select the ‘Lead’ object from the dropdown and click **Next** or open and edit your existing Lead Duplicate Rule
3. Set the following values:
  - “Rule Name” = Interaction Lead Duplicate Rule
  - “Description” = This rule is leveraged by the Interaction Process. Action on Create and Edit must be set to Block.
  - “Record-Level Security” = Bypass sharing rules
  - “Action on Create” = Block
  - “Action on Edit” = Block
  - “Alert Text” = (leave the standard message or create your own!)
  - “Compare Leads with” = Leads
  - “Matching Rule” = Interaction Lead Matching
  - “Conditions” = None
4. Click **Save** and then **Activate** the Duplicate Rule

# Create Duplicate and Matching Rules (cont.)

## Create or Update Duplicate Rules (cont.)

### Contact Duplicate Rule

1. Go to **Setup > Data > Duplicate Management > Duplicate Rules**
2. Click **New Rule** and select the ‘Contact’ object from the dropdown and click **Next** or open and edit your existing Contact Duplicate Rule.
3. Set the following values:
  - “Rule Name” = Interaction Contact Duplicate Rule
  - “Description” = This rule is leveraged by the Interaction Process. Action on Create and Edit must be set to Block.
  - “Record-Level Security” = Bypass sharing rules
  - “Action on Create” = Block
  - “Action on Edit” = Block
  - “Alert Text” = (leave the standard message or create your own!)
  - “Compare Contacts with” = Contacts
  - “Matching Rule” = Interaction Contact Matching (the Contact Matching Rule you created or updated earlier)
  - “Conditions” = None
4. Click **Save** and then **Activate** the Duplicate Rule



**Note:** See the “Duplicate Matching” section of the [Technical Implementation Guide](#) for more information about how the Interactions Processor uses these matching and duplicate rules.

# Update Lead to Contact Standard Field Mapping

The Interactions Processor makes use of the standard Lead Conversion process to convert Leads to Contacts. Through Interactions, Salesforce Lead Mappings only work for mapping custom Lead fields to other custom Account or Contact fields. Standard Lead fields are automatically mapped. Custom Lead fields cannot be mapped to standard fields and vice versa.



**Note:** Lead Mappings will not function from Leads to Opportunities. To map fields from Leads to Opportunities, use Interaction Mappings to map Lead fields directly to Interactions and from Interactions to Opportunities.

To ensure the Duplicate Rules work as expected, any custom fields included in Duplicate Matching Rules must be mapped from Leads to Contacts.

## Follow these steps:

1. Go to **Setup > Object Manager > Lead > Fields & Relationships**
2. Click on the **Map Lead Fields** button in the upper right
3. Map the Lead fields to their counterpart Contact fields:

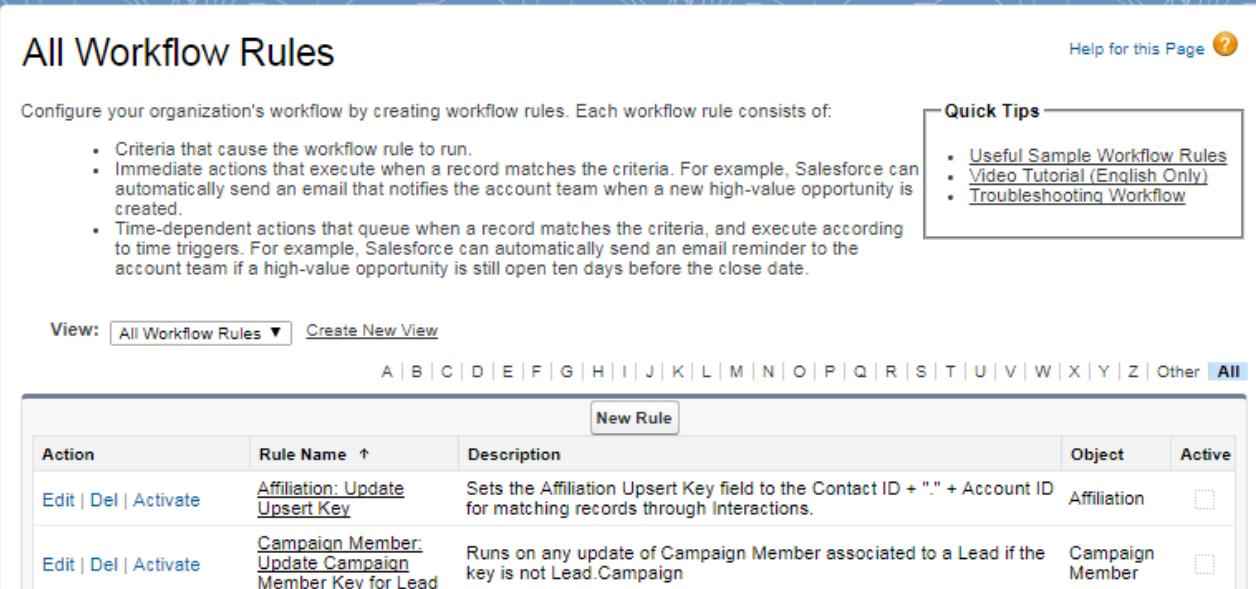
ACCOUNT	CONTACT	OPPORTUNITY
Lead Fields	Contact Fields	
Admit Type	None	
Affiliated Account	None	
Affiliation Role	None	
Birthdate	None	
Career	None	
Constituent ID	Constituent ID	
Ethnicity	Ethnicity	
Gender	Gender	
Primary Affiliation	None	

# Activate Workflow Rules

The Interactions package includes several Workflow Rules that should be activated after installation. For a complete list of the delivered rules and their field updates, see the [Data Dictionary](#).

To activate a Workflow Rule, follow the steps below:

1. Go to **Setup > Process Automation > Workflow Rules**



Action	Rule Name ↑	Description	Object	Active
Edit   Del   Activate	<a href="#">Affiliation: Update Upsert Key</a>	Sets the Affiliation Upsert Key field to the Contact ID + "." + Account ID for matching records through Interactions.	Affiliation	<input type="checkbox"/>
Edit   Del   Activate	<a href="#">Campaign Member: Update Campaign Member Key for Lead</a>	Runs on any update of Campaign Member associated to a Lead if the key is not Lead.Campaign	Campaign Member	<input type="checkbox"/>

2. Go through the list of Workflow Rules and select the **Activate** link next to rule's name to activate that rule
3. Each time you activate a rule, the page will refresh



# Update Object Page Layouts

Interactions for Student Recruitment includes the following page layouts:

- Interactions
- Interaction Mappings
- Academic Interests
- Recruitment Interests
- Inquiry Opportunities
- Applicant Opportunities

The package also includes new fields and related lists you will want to add to your existing page layouts. The update steps are very similar for each page layout, so feel free to jump around or complete one and try the rest out on your own.

Additionally, the Interactions Package includes some new object-specific custom Actions (in Classic and Lightning) for the following objects:

- Leads
- Contacts
- Opportunities
- Campaigns

To take full advantage of the new functionality, these Actions need to be added to the page layouts of these objects (except for Opportunity layouts, these come out-of-the-box with the custom Actions). For this reason, we recommend at least completing the steps for adding the new custom Actions to these page layouts.

We talk more about using these Actions in [Best Practices - Creating Interactions Manually](#).



# Update Object Page Layouts (cont.)

## Update Lead Layouts:

1. Go to Setup > Object Manager > Lead > Page Layouts
2. Open the page layout you want to update by clicking on the name
3. You will be adding Actions from two sections found in the left side of the palette at the top of the Page Layout edit page:
  - Quick Actions for Classic Apps
  - Salesforce1 & Lightning Actions for Lightning Apps

The screenshot shows the 'Lead Layout' edit page. At the top, there are buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a vertical palette lists 'Fields' and other options: Buttons, Custom Links, Quick Actions, Salesforce1 & Lightning Actions, and Expanded Lookups. The main area displays a 'Quick Find' search bar and a grid of fields. The first row contains 'Section' and 'Affiliated Account'. The second row contains 'Blank Space' and 'Affiliation Role'. The third row contains 'Address' and 'Annual Revenue'. The fourth row contains 'Admit Type' and 'Birthdate'. The fifth row contains 'Constituent'.

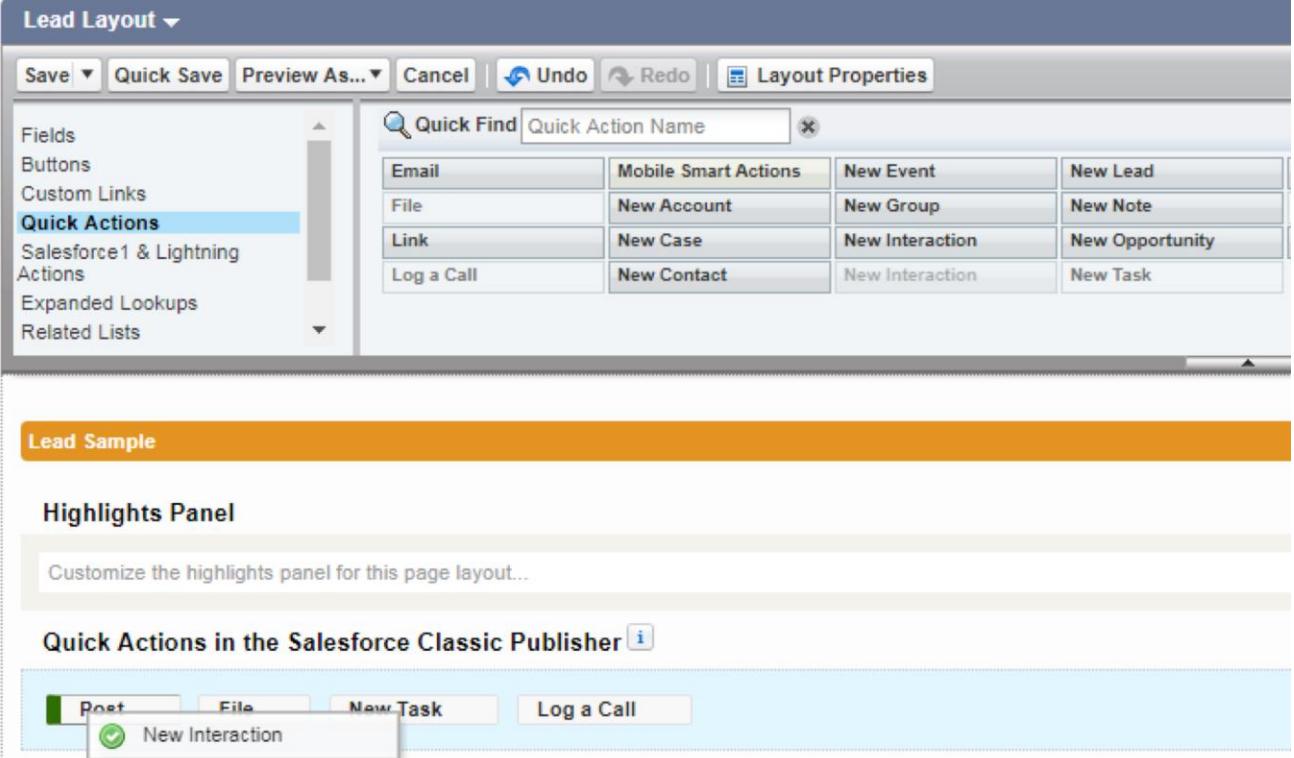
4. In both the Quick Actions and Salesforce1 & Lightning Actions sections, you will see two Actions named "New Interaction." Hover over each to see the developer name. The Lead-specific action, which you will add to your Lead Page Layouts, is named "Lead.New\_Interaction."

The screenshot shows a tooltip for the 'New Interaction' action. The tooltip contains the following information:  
Label: New Interaction  
Name: Lead.New\_Interaction  
Action Type: Quick Action  
Create Feed Item: Yes

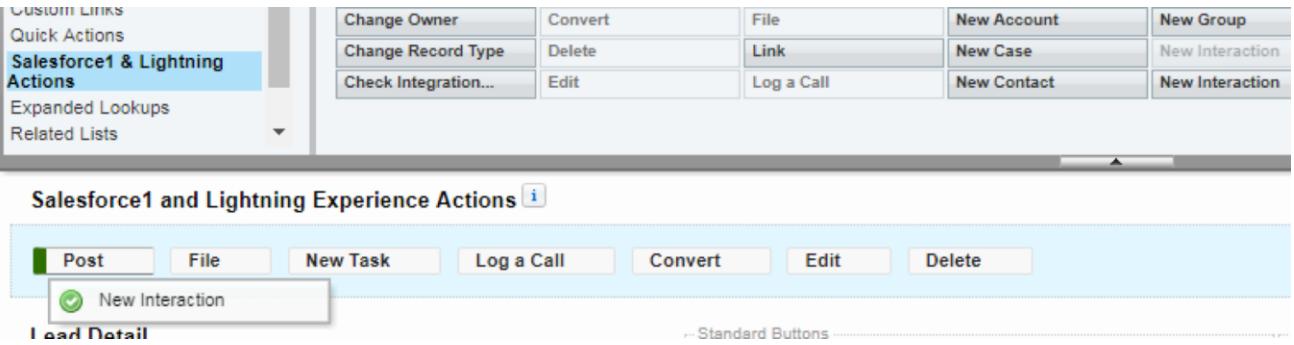
# Update Object Page Layouts (cont.)

## Update Lead Layouts (cont.)

5. Drag the “Lead.New\_Interaction” action to the Quick Actions in the Salesforce Classic Publisher section for use in Classic...



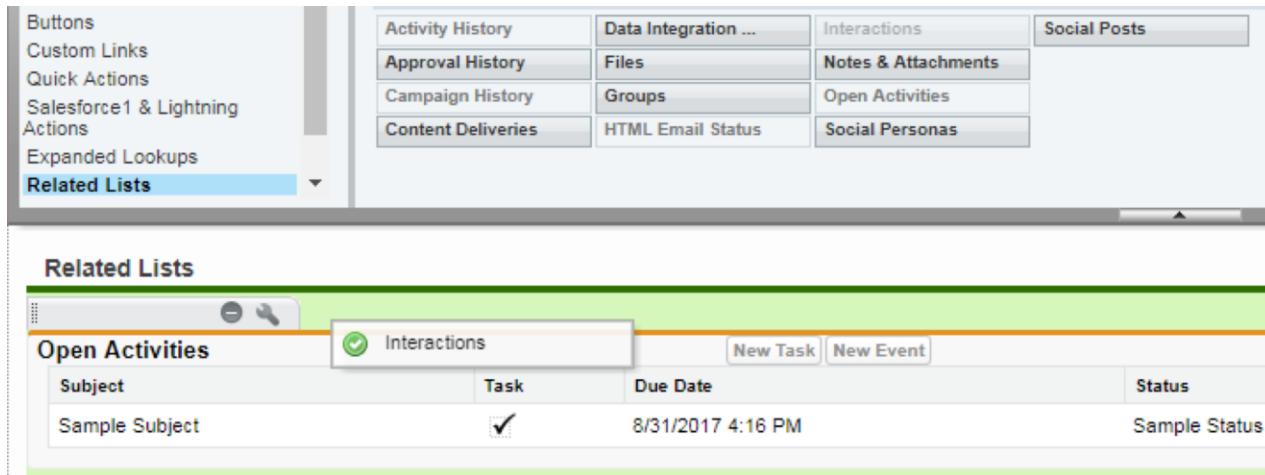
...and to the Salesforce1 and Lightning Experience Actions section for use in Lightning:



# Update Object Page Layouts (cont.)

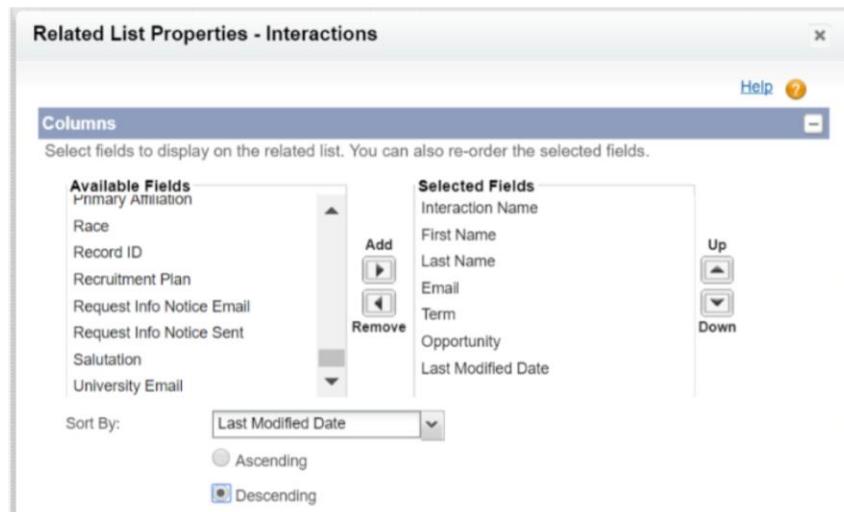
## Update Lead Layouts (cont.)

6. Select **Related Lists** in the left side of the palette and drag the Interactions related list to the desired position in the related list section:



The screenshot shows the Salesforce interface. On the left, there is a palette with various options like Buttons, Custom Links, Quick Actions, etc., with 'Related Lists' selected. In the center, there's a 'Related Lists' section containing a table for 'Open Activities'. One row in the table is highlighted with a green checkmark next to the 'Interactions' column header. The table has columns for Subject, Task, Due Date, and Status.

7. You can add, remove, or move the fields that display in the related list, decide how to sort the records, and determine which buttons appear by clicking the wrench icon. Choose a limit of ten fields to display in Classic and the “View All” page for related lists in Lightning. The first four fields will display in the related list on record pages in Lightning.

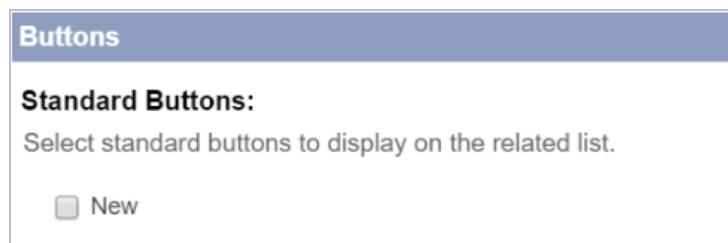


This screenshot shows the 'Related List Properties - Interactions' dialog box. It has a 'Columns' section where users can select fields to display on the related list. On the left is a list of 'Available Fields' including Primary Affiliation, Race, Record ID, Recruitment Plan, Request Info Notice Email, Request Info Notice Sent, Salutation, and University Email. On the right is a list of 'Selected Fields' including Interaction Name, First Name, Last Name, Email, Term, Opportunity, and Last Modified Date. There are 'Add' and 'Remove' buttons between the two lists, and 'Up' and 'Down' buttons for reordering. At the bottom, there are 'Sort By:' dropdowns set to 'Last Modified Date' and radio buttons for 'Ascending' and 'Descending' order.

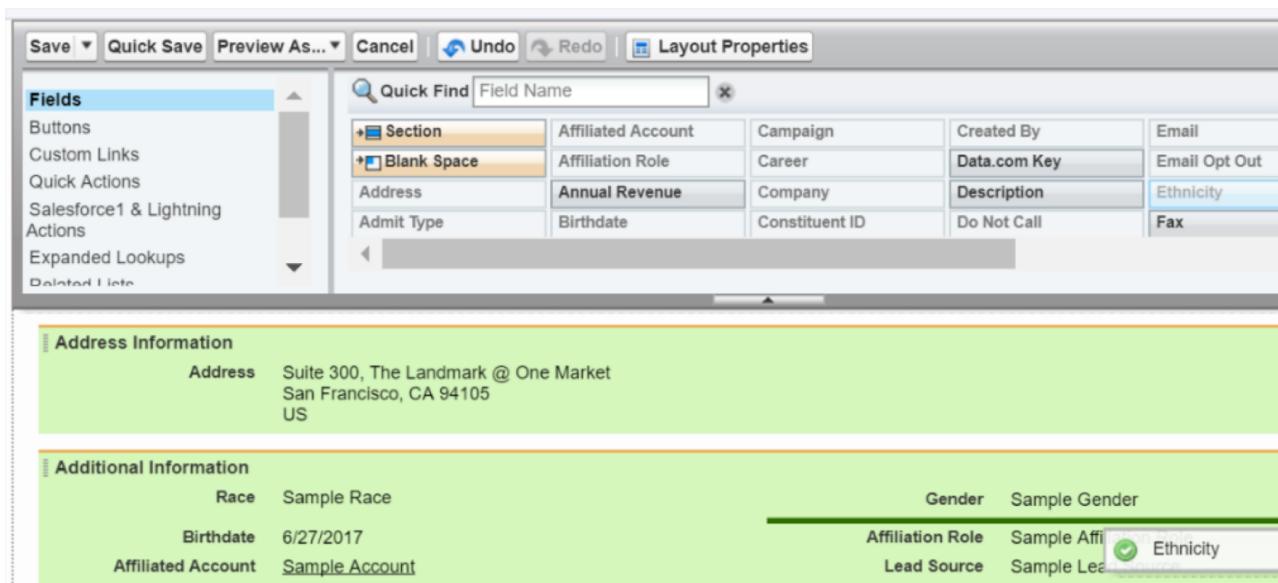
# Update Object Page Layouts (cont.)

## Updating Lead Layouts (cont.)

- Consider removing the **New** button in the Interactions Related List options to ensure users create Interactions with the Actions you added in [step 5](#).



- Drag any new fields to their desired position on the Lead layout from Fields in the left of the palette. See the [Data Dictionary](#) for a full list of fields added through the package.

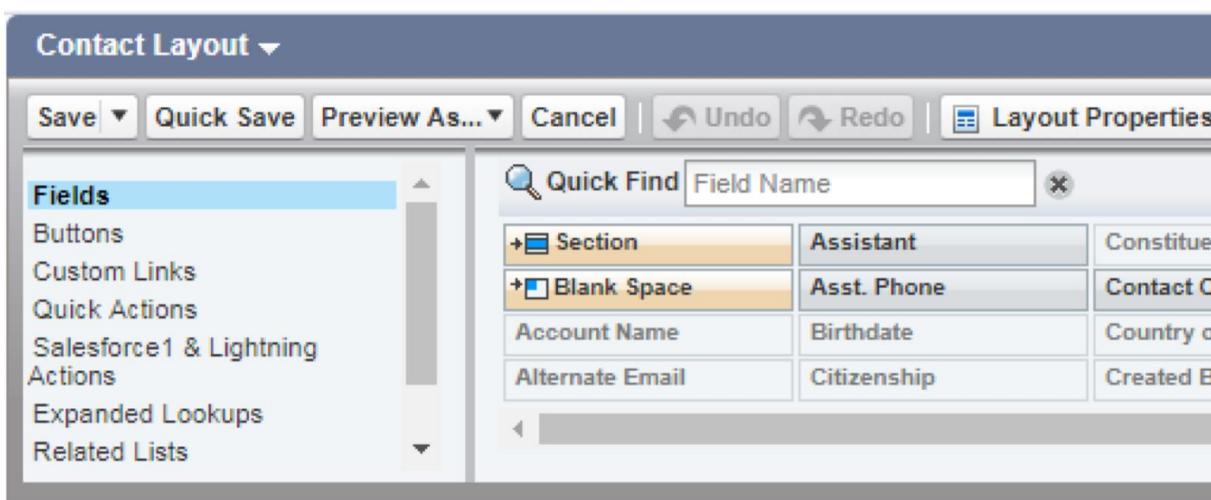


- Click Save

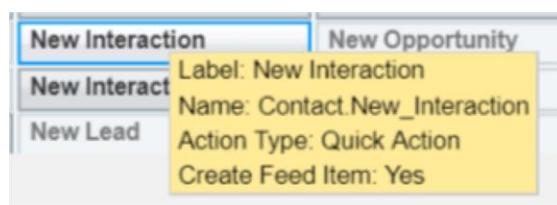
# Update Object Page Layouts (cont.)

## Update Contact Layouts:

1. Go to Setup > Object Manager > Contact > Page Layouts
2. Open the page layout you want to update by clicking on the name
3. You will be adding Actions from two sections found in the left side of the palette at the top of the Page Layout edit page:
  - Quick Actions for Classic Apps
  - Salesforce1 & Lightning Actions for Lightning Apps



4. In both sections, you will see two actions named “New Interaction.” Hover over each to see the developer name. The Contact-specific action, which you will add to your Contact Page Layouts, is named “Contact.New\_Interaction.”



# Update Object Page Layouts (cont.)

## Update Contact Layouts (cont.)

5. Follow [step 5](#) of Updating Lead Layouts to add the custom Actions to the Quick Actions in the Salesforce Classic Publisher and Salesforce1 and Lightning Experience Actions sections of the Contact layout
6. Follow [steps 6-8](#) of Updating Lead Layouts to add the Interactions related list to the Contact layout and learn about some related list options
7. Follow [step 9](#) of Updating Lead Layouts to add, remove, and/or move new and existing fields on the Contact layout
8. Click **Save**

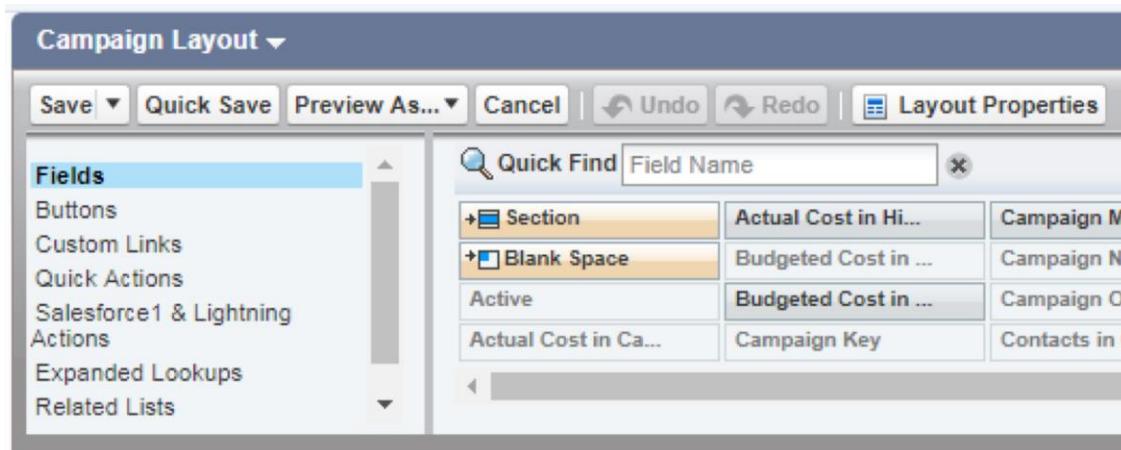


**Note:** For a comprehensive list of the fields added in by the package, please see the [Data Dictionary](#).

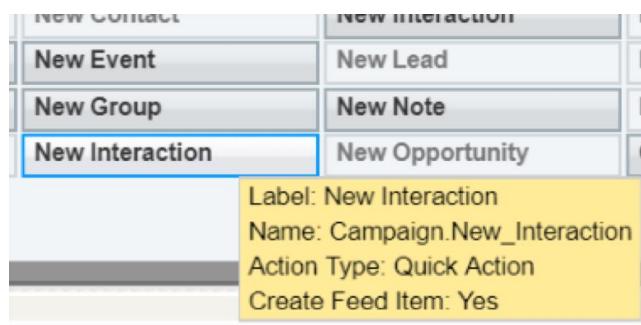
# Update Object Page Layouts (cont.)

## Update Campaign Layouts:

1. Go to Setup > Object Manager > Campaign > Page Layouts
2. Open the page layout you want to update by clicking on the name
3. You will be adding Actions from two sections found in the left side of the palette at the top of the Page Layout edit page:
  - Quick Actions for Classic Apps
  - Salesforce1 & Lightning Actions for Lightning Apps



4. In both sections, you will see two actions named “New Interaction.” Hover over each to see the developer name. The Campaign-specific action, which you will add to your Campaign Page Layouts, is named “Campaign.New\_Interaction.”



# Update Object Page Layouts (cont.)

## Update Campaign Layouts (cont.)

5. Follow [step 5](#) of Updating Lead Layouts to add the custom Actions to the Quick Actions in the Salesforce Classic Publisher and Salesforce1 and Lightning Experience Actions sections of the Campaign layout
6. Follow [steps 6-8](#) of Updating Lead Layouts to add the Interactions related list to the Campaign layout and learn about some related list options
7. Follow [step 9](#) of Updating Lead Layouts to add, remove, and / or move new and existing fields on the Campaign layout
8. Click **Save**



**Note:** For a comprehensive list of the fields added in by the package, please see the [Data Dictionary](#).

# Update Object Page Layouts (cont.)

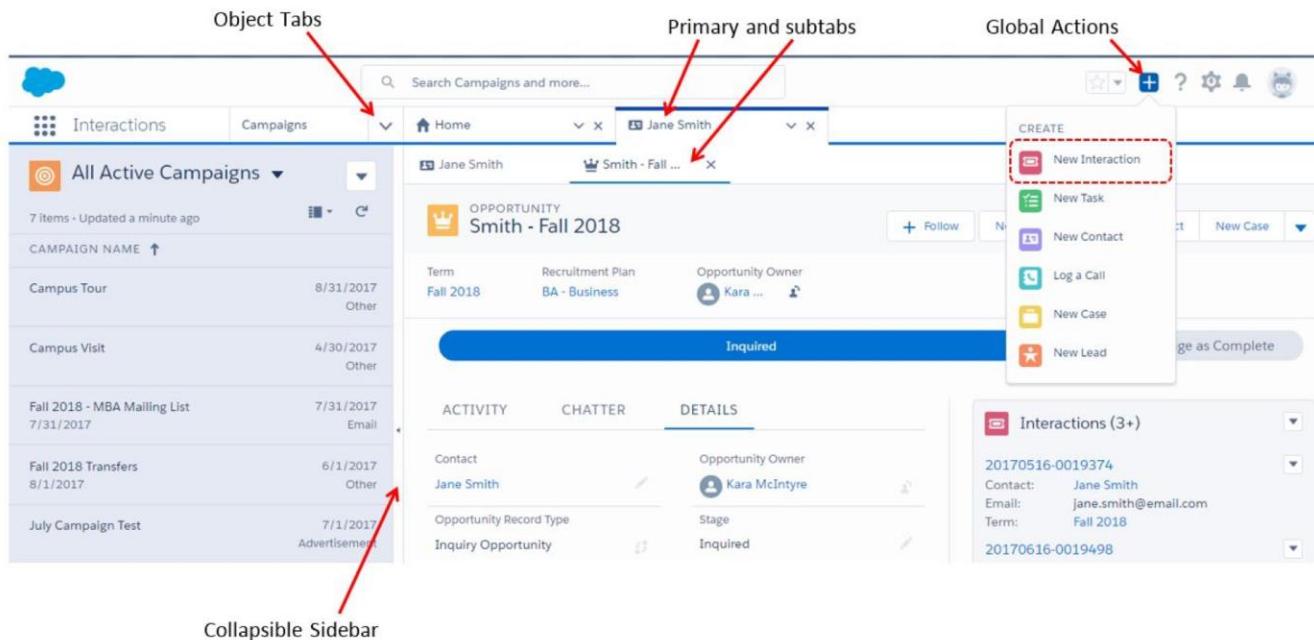
## Update Campaign Member Layouts:

1. Go to Setup > Object Manager > Campaign Member > Page Layouts
2. Open the page layout(s) you want to update by clicking on the name
3. Drag any new fields to their desired position on the Campaign Member layout from Fields in the left of the palette. See the [Data Dictionary](#) for a full list of fields added through the package.



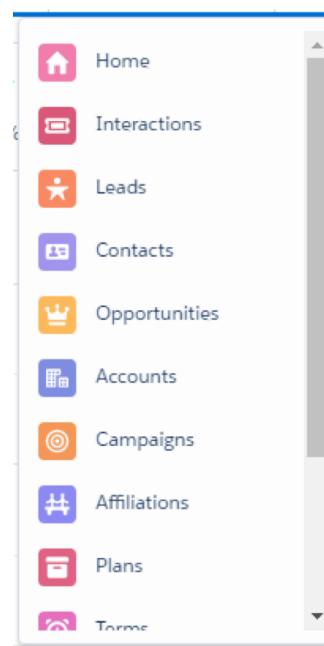
# Navigating the Interactions App

The delivered Interactions App is a Lightning Console App. See the screenshot below for a quick look at navigating this type of app. To learn more about Lightning Consoles, visit the Salesforce Help documentation for [Salesforce Consoles](#).



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



## Navigating the Interactions App (cont.)

You will also notice that several object List Views have been added. To view the complete set of List Views delivered by Interactions for Student Recruitment, see the [Data Dictionary](#).



**Note:** The custom Global Action **New Interaction** is included in the Interactions App. If you do not see this Action, follow the steps in the next section to add it.

## Using a Different App

Although Interactions for Student Recruitment comes with its own app, you are not required to use it. You can create your own recruitment app or simply add features of Interactions for Student Recruitment to an existing app.

If you choose to create your own or add to an existing app, we recommend at least including the following tabs:

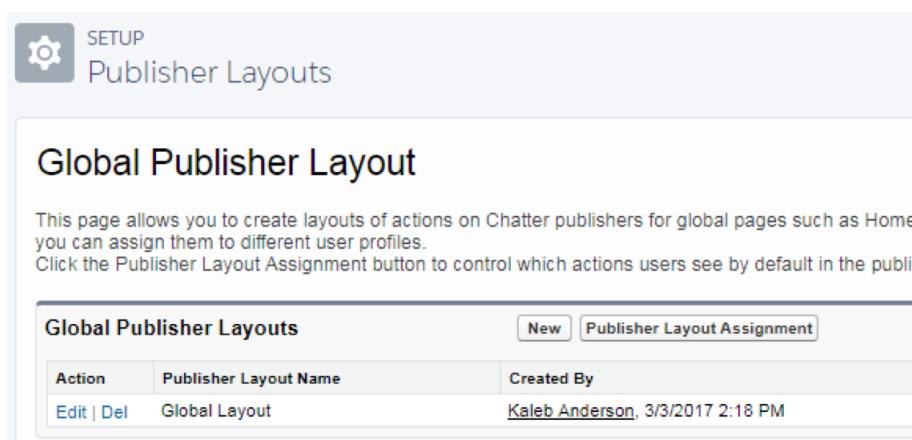
- Interactions
- Opportunities
- Accounts
- Campaigns
- Affiliations
- Plans
- Terms
- Interaction Mappings

You will also want to include the **New Interaction** custom Global Action to the Global Publisher Layout. Follow the steps on the following pages to add the Global Action.

# Using a Different App (cont.)

## Add the Custom Global Action:

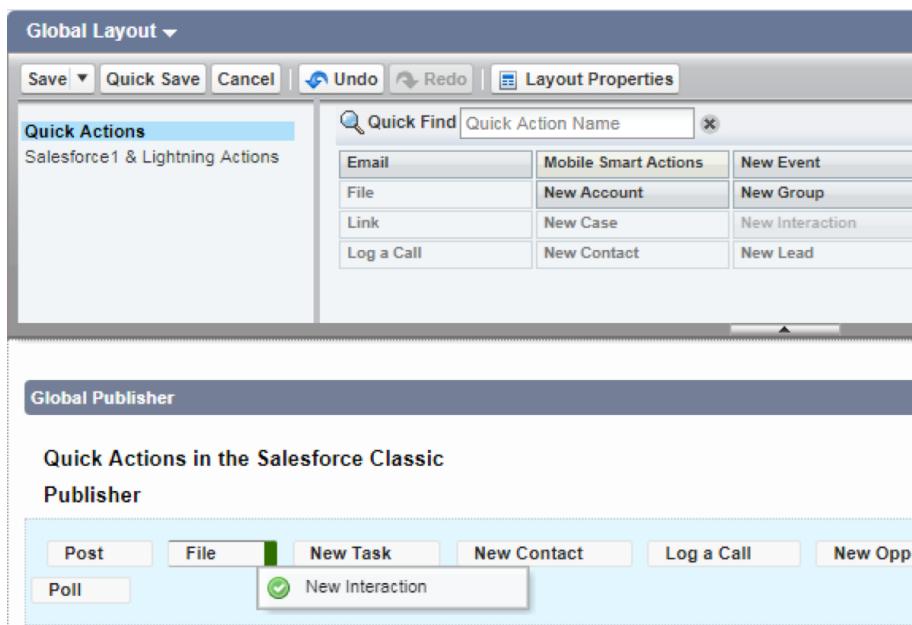
1. Go to Setup > User Interface > Global Actions > Publisher Layouts
2. Select the Edit link next to Global Layout (or whichever publisher layout you wish to update)



The screenshot shows the 'Publisher Layouts' page under 'SETUP'. A single row is listed in the table:

Action	Publisher Layout Name	Created By
<a href="#">Edit   Del</a>	Global Layout	Kaleb Anderson, 3/3/2017 2:18 PM

3. In the Quick Actions section of the Global Layout editor palette, drag the “New Interaction” action to a place in the Quick Actions in the Salesforce Classic Publisher section



The screenshot shows the 'Global Layout' editor palette. The 'Quick Actions' section lists various actions:

Email	Mobile Smart Actions	New Event
File	New Account	New Group
Link	New Case	New Interaction
Log a Call	New Contact	New Lead

The 'Salesforce Classic Publisher' section shows the 'Quick Actions in the Salesforce Classic Publisher' palette with the 'New Interaction' action highlighted.



# Using a Different App (cont.)

## Add the Custom Global Action (cont.)

4. In the Salesforce1 & Lightning Actions section of the Global Layout editor palette, drag the “New Interaction” action to a place in the Salesforce1 & Lightning Experience Actions section:

The screenshot shows the Global Layout editor interface. At the top, there are buttons for Save, Quick Save, Cancel, Undo, Redo, and Layout Properties. On the left, a sidebar titled "Quick Actions" has a section for "Salesforce1 & Lightning Actions" which is currently selected. A "Quick Find" search bar is present. Below the sidebar is a table with four columns and four rows of actions:

Email	Mobile Smart Actions	New Event	New Note
File	New Account	New Group	New Opportunity
Link	New Case	New Interaction	New Task
Log a Call	New Contact	New Lead	Poll

Below this is a section titled "Salesforce1 and Lightning Experience Actions" with a blue information icon. It contains a row of buttons: Post, File, New Task, New Contact, Log a Call, New Opportunity, Poll, and New Interaction. The "New Interaction" button is highlighted with a green checkmark and a dashed border, indicating it has been selected or is being moved.

5. Click the **Save** button to save your changes
6. Click **Publisher Layout Assignment** to update the assignment of Publisher Layouts by user Profile

# Best Practices - Creating Interactions via Integrations

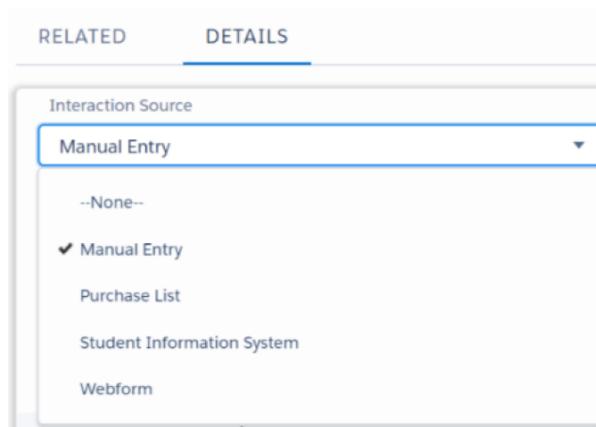
Interactions can be used to update a single record through the Interactions Tab or through the delivered custom Actions. Interactions can also be used to load multiple records at once using a data import or integration tool. The following subsections reviews some of the best practices administrators should keep in mind when creating Interactions in mass either by manual data loading processes or integrations.

## Interaction Sources

Interaction Source is a field on Interactions that tracks the method used to create the record. The purpose of this field is different from Lead Source or Campaigns because it tracks more technical information about the source of the data and can be used to customize how Interaction fields are mapped using the Skip Mapping feature of Interaction Mapping records.

**Out-of-the-box, the fields (on both objects) contain the following values:**

- Manual Entry
- Purchase List
- Student Information System
- Webform



**Note:** You can [add your own](#) values to match your business processes, but remember to add them to both Interaction Source on Interactions and Skip Mapping on Interaction Mappings.



# Interaction Sources (cont.)

## Using Interaction Source with Lead Source and Campaigns

Interaction Source can be used to report on the types of Interactions being created in the system for analysis or troubleshooting. For example, let's say you have a student information system (SIS) you want to integrate with Salesforce that gathers data from a variety of different sources.

The various sources are tracked in that system. So, within the SIS, some records were created because of a web form, others from applications, and still others from event registrations. When you load this data into Salesforce, you map these different source values to the Lead Source values and/or add Contacts and Leads to the appropriate source Campaigns.

But what about recording that all of these records ultimately came from the integration with the SIS?

This is where the Interaction Source field comes in with a value for 'Student Information System.' Now, you can report on all Interactions created from data in your SIS without losing the various sources of that data.

## Using Interaction Source with Interaction Mappings

The Interaction Source field and values can also be used to control some additional functionality provided through Interaction Mapping records. Each Interaction Mapping record has a "Skip Mapping" multi-select picklist with the same values as Interaction Source.

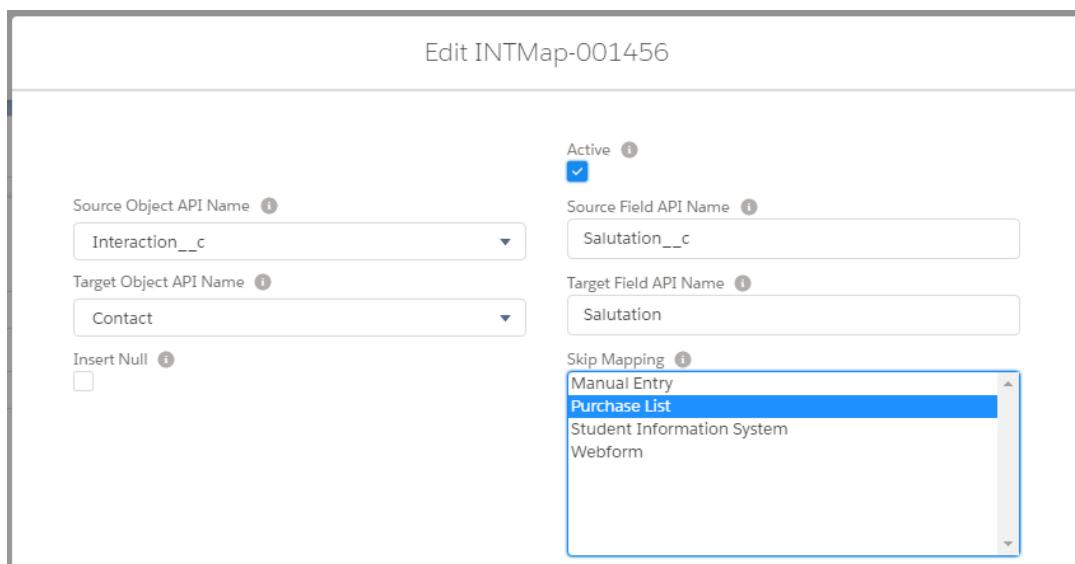
Any values you select in this picklist will allow the Interaction Processor (the custom code) to treat that Interaction Mapping record as if it is inactive, when an Interaction is created with the same value in Interaction Source. This is most useful when dealing with unreliable data sources.

# Interaction Sources (cont.)

## Using Interaction Source with Interaction Mappings (cont.)

For example, many universities receive purchase lists containing not only names but other data about potential students. These purchase lists can contain great information, but sometimes the data is messy. Maybe you've discovered the Salutation field is often wrong on a purchase list you routinely load, and you don't want it to overwrite the Contact's Salutation field in Salesforce every time the list is loaded.

However, you still want the data to write to the Interaction record so it can be added later, if desired, or included in Interaction reports. To achieve this, simply find the Salutation field's Interaction Mapping record and update the Skip Mapping field to include 'Purchase List,'. The Salutation field can now be included on the Interaction record, but the Contact's field will not be updated from Interactions with an Interaction Source of 'Purchase List.'



Edit INTMap-001456

Active

Source Object API Name

Target Object API Name

Source Field API Name

Target Field API Name

Insert Null

Skip Mapping

Manual Entry  
Purchase List  
Student Information System  
Webform

See the [Interaction Mappings](#) sections of this guide and visit the other documentation for more information about Skip Mapping and other Interaction Mapping functionality.



# Interaction Sources (cont.)

## Adding Interaction Source Values

Add or remove Interaction Source values as needed by using the following steps:

1. Go to **Setup > Object Manager > Interaction > Fields & Relationships**
2. Find the “Interaction Source” field and click on the linked name to view the current values
3. Select the **New** button in the Values section to add your values and **Save**
4. Click the **Del** link next to any value(s) you want to remove
5. Select the **Reorder** button to update the order of the values
6. Go to **Setup > Object Manager > Interaction Mapping > Fields & Relationships**
7. Find the “Skip Mapping” field and click on the linked name to view the current values
8. Click the **New** button in the Values section to add your values and **Save**
9. Click the **Del** link next to any values you want to remove
10. Select the **Reorder** button to update the order of the values (it is recommended that the order for both fields be the same for consistency)

**Best Practice Nugget:** Remember, if you are adding a value or values to the “Interaction Source” field on Interactions, you should always also add it to the “Skip Mapping” field on Interaction Mappings and vice versa.



# Loading with an Integration Tool

Creating Interaction records with an integration tool is very similar to creating them manually using the Salesforce API. First, you will need to identify the tool you want to use.

**Here are a few options:**

- Salesforce Data Import Wizard
- Salesforce Data Loader
- Developer Console
- Other AppExchange apps for integration

Next, setup the tool you selected to create Interaction records and map the fields from the source to Interaction fields. For tools like the Salesforce Data Import Wizard or Salesforce Data Loader, this most likely means mapping the columns from your CSV file to Interaction fields.

Confirm you have mapped all fields required to match to existing Leads and Contacts and to create Contacts. By default, this means First Name, Last Name and Email. If you have customized required fields or duplicate management, those customizations should be considered.

And don't forget about Interaction Source! Include a column or setting to default Interaction Source to a value representing the data load to make it easier to report on the records once they are created.

# Best Practices - Creating Interactions Manually

A new Interaction can be quickly created for an existing Lead, Contact, or Opportunity using a custom Interaction creation Action on the Lead, Contact, or Opportunity, respectively. Additionally, a custom Interaction creation Action is included in the package for the Campaign object and as a Global Action.

## Overview of Custom Actions

The Interaction Package includes five Actions:

- Lead Interaction Action
- Contact Interaction Action
- Opportunity Interaction Action
- Campaign Interaction Action
- Global Interaction Action

The object-specific actions are extremely useful when the end user (e.g. a recruiter) is speaking with a prospective student and has already found the individual in the system and needs to update their data. In that moment, the recruiter does not need to worry about determining which Opportunity to update or whether there are duplicate Leads or Contact records in the system.

When the Interaction is created, the full process will run and any duplicate records found will be converted or merged automatically and any Opportunity, Affiliation, or Campaign Members will be updated or created.

## Overview of Custom Actions (cont.)

Each action has a different layout with fields tailored to the use case of the object it lives on, as well as defaulted values for verifying or updating. Other values can be defaulted without including them on the layout. All of these custom action layouts can be customized to better match your business processes.

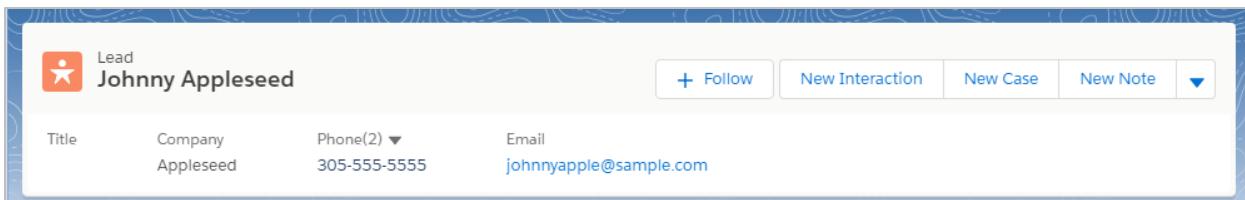
**There are several benefits to using actions and incorporating them into your business processes:**

- Displaying only fields that should be edited simplifies the record creation process for the user
- Fields that can be prefilled and should not be edited can be defaulted and hidden from the layout to further streamline the experience
- Displayed fields can also be prefilled, resulting in less clicks and giving users the opportunity to leave the defaulted values or update them as applicable
- You can require fields that should be filled out for that action's use case that are not necessarily required every time an Interaction is created

**Best Practice Nugget:** To take full advantage of actions, remove the **New** button from the Interaction related lists on Lead, Contact, and Opportunity. This will prevent users from creating Interactions from records unless they use one of the actions. They would still be able to create an Interaction from the Interactions Tab.

# Lead Interaction Action

The Lead action defaults fields from the Lead that have values, except for picklist fields, which are not supported. The Lead action can be launched from the Lead using the “New Interaction” button in the top right of the record. See the [Updating Lead Layouts](#) section if you do not see this button.



**The Lead fields defaulted and displayed in the action for the out-of-the-box package are shown in this example:**

Note that picklist fields cannot be predefined based on the existing record’s value, as that is not currently supported in Salesforce. Unless “Insert Null” is selected on the corresponding Interaction Mapping record, leaving these fields blank (–None–) will not push in blank values to the target fields if they are already populated.

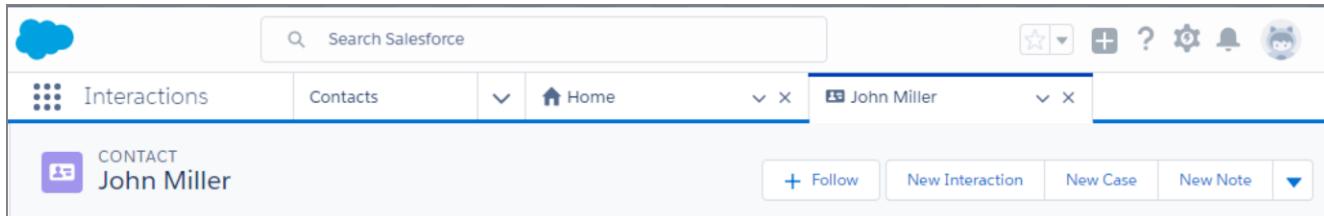
Picklist fields can only be defaulted to a specific value. Be sure to take care when predefining picklist fields.

Vote on [this Idea](#) to expand the predefined field functionality in custom actions to include picklists!

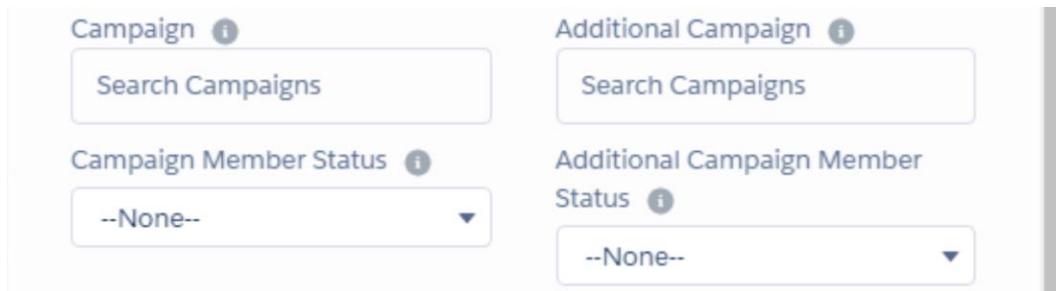
# Contact Interaction Action

The Contact action defaults fields from the Contact that have values, except for picklist fields, which are not supported.

The Contact action can be launched from the Contact using the **New Interaction** button on the top right of the record. See [Updating Contact Layouts](#) if you do not see this button.



The Contact fields defaulted and displayed in the action for the initial package are the same as the Lead fields (seen on the previous page) with the addition of two fields: “Additional Campaign” and “Additional Campaign Member Status.”

A comparison of two field groups. On the left, under "Campaign", there is a "Search Campaigns" button and a "Campaign Member Status" dropdown menu set to "--None--". On the right, under "Additional Campaign", there is a "Search Campaigns" button and an "Additional Campaign Member Status" dropdown menu set to "--None--". Both sections include an information icon (i) next to their respective labels.

## Contact Interaction Action (cont.)

**Best Practice Mega-Nugget:** Note that, out-of-the-box, the Contact and Lead action layouts house quite a few fields that collect very different information, including bio/demo data, educational interest information and fields for creating an Affiliation and Campaign Members.

This is because end users may use Interactions from the Lead or Contact with the minimum data needed (e.g. Name and email) or they may need to fill out multiple points of data and create related records (e.g. an Opportunity via the educational interest information).

On the other hand, the Opportunity custom action (which you will see in the next section) includes only the fields which are most important for updating or creating new Opportunity, Affiliation, and Campaign Members quickly.

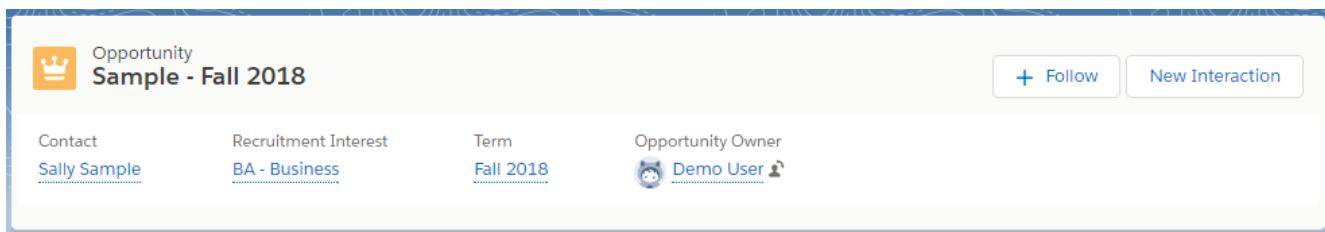
The Campaign custom action includes the minimum bio/demo fields needed to create a Campaign Member as well as the fields needed for updating or creating a new Opportunity or Affiliation.

The Global custom action includes the same fields as the Lead and Contact custom action layouts.

# Opportunity Interaction Action

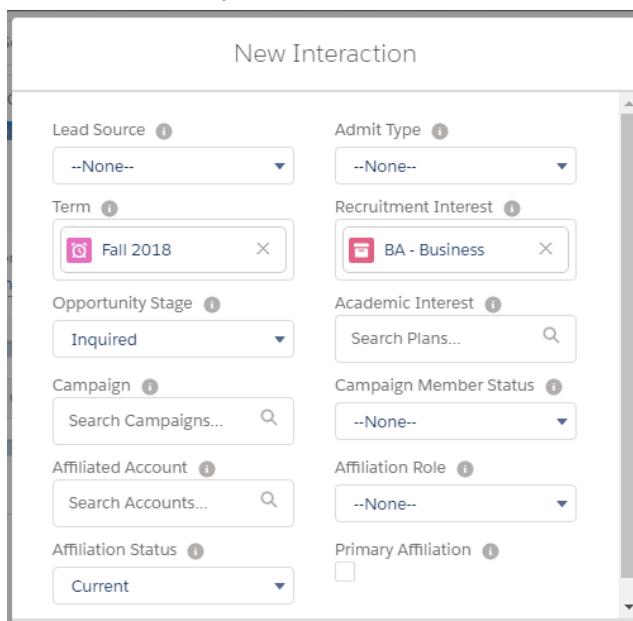
The Opportunity action defaults fields from the Opportunity and associated Contact that have values, except for picklist fields, which are not supported. Many of the Contact fields are defaulted and not displayed to provide a more streamlined experience, as mentioned in the [Best Practice Mega-Nugget](#) on the previous page. If users need to verify or update Contact fields, the Contact-specific action should be used instead.

The Opportunity action can be launched from the Opportunity using the **New Interaction** button on the top right of the record. See the [Update Object Page Layouts](#) section if you are using an Opportunity page layout that was not included in the package and do not see the button.



A screenshot of the Opportunity object page for "Sample - Fall 2018". The page header shows the opportunity name and a "Follow" button. Below the header, there are four sections: "Contact" (Sally Sample), "Recruitment Interest" (BA - Business), "Term" (Fall 2018), and "Opportunity Owner" (Demo User). A "New Interaction" button is located in the top right corner of the page area.

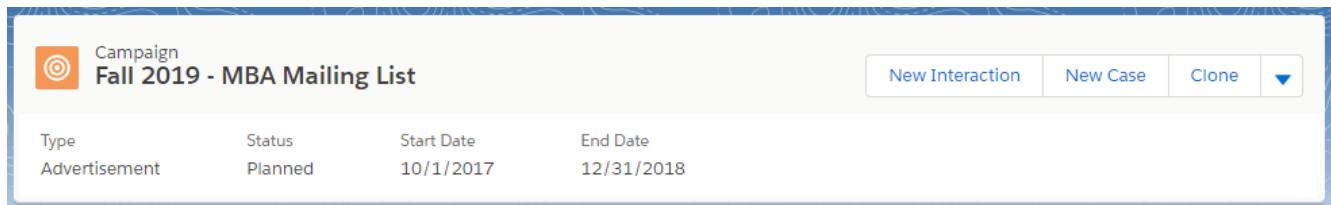
The Opportunity fields defaulted and displayed in the action for the initial package are shown in this example:



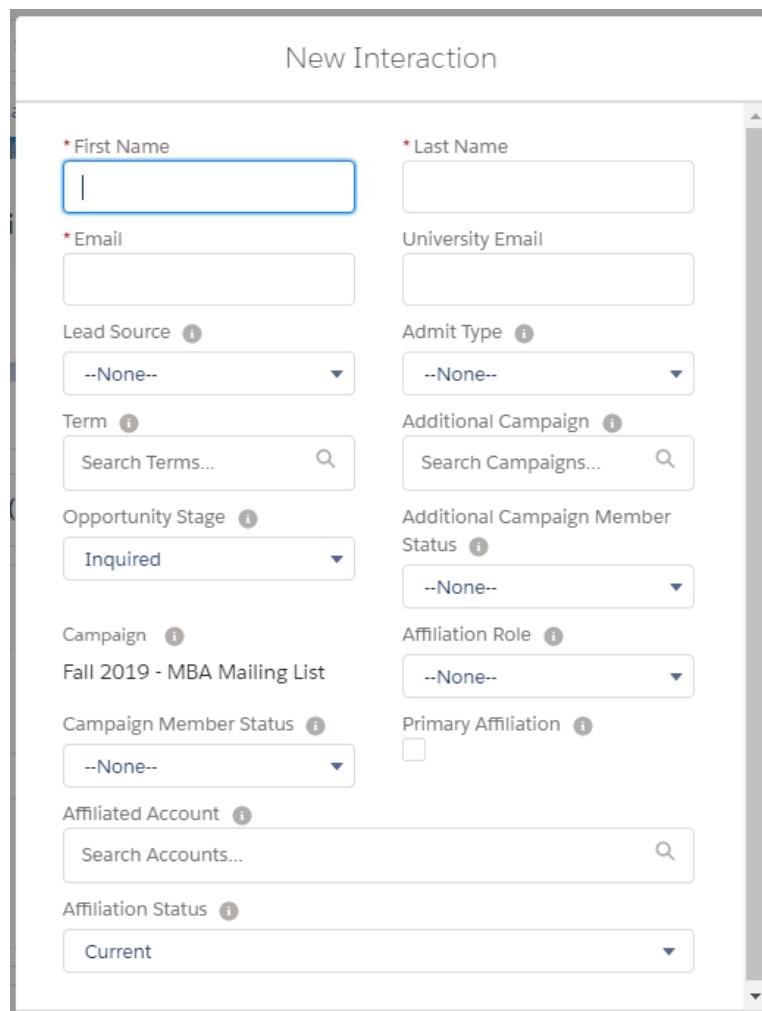
A screenshot of the "New Interaction" dialog box. The dialog has a title bar "New Interaction". It contains two columns of fields. The left column includes "Lead Source" (dropdown: --None--), "Term" (dropdown: Fall 2018), "Opportunity Stage" (dropdown: Inquired), "Campaign" (button: Search Campaigns...), "Affiliated Account" (button: Search Accounts...), and "Affiliation Status" (dropdown: Current). The right column includes "Admit Type" (dropdown: --None--), "Recruitment Interest" (dropdown: BA - Business), "Academic Interest" (button: Search Plans...), "Campaign Member Status" (dropdown: --None--), "Affiliation Role" (dropdown: --None--), and "Primary Affiliation" (checkbox).

# Campaign Interaction Action

The Campaign action can be launched from the Campaign using the **New Interaction** button on the top right of the record. See the [Updating Campaign Layouts](#) section if you do not see this button.



The Campaign action only defaults the Campaign from which the button was clicked from and is shown in this example:



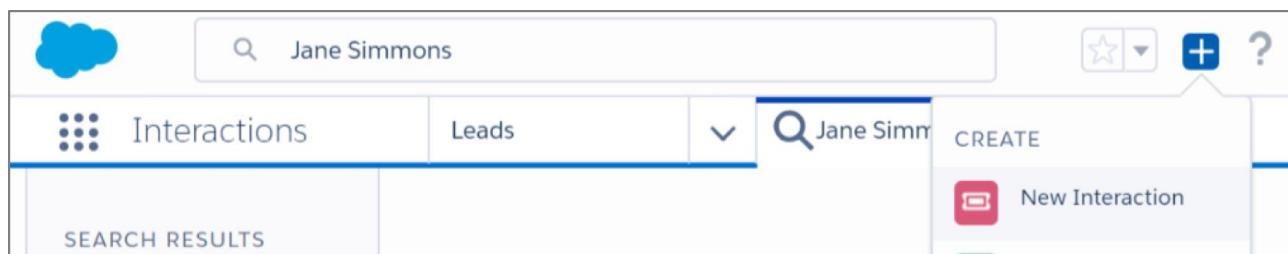
New Interaction	
* First Name	<input type="text" value="I"/>
* Last Name	<input type="text"/>
* Email	<input type="text"/>
University Email	<input type="text"/>
Lead Source <small>i</small>	--None--
Admit Type <small>i</small>	--None--
Term <small>i</small>	<input type="text" value="Search Terms..."/> 
Additional Campaign <small>i</small>	<input type="text" value="Search Campaigns..."/> 
Opportunity Stage <small>i</small>	Inquired
Additional Campaign Member Status <small>i</small>	--None--
Campaign <small>i</small>	Fall 2019 - MBA Mailing List
Affiliation Role <small>i</small>	--None--
Campaign Member Status <small>i</small>	--None--
Primary Affiliation <small>i</small>	<input type="checkbox"/>
Affiliated Account <small>i</small>	<input type="text" value="Search Accounts..."/> 
Affiliation Status <small>i</small>	Current

# Global Interaction Action

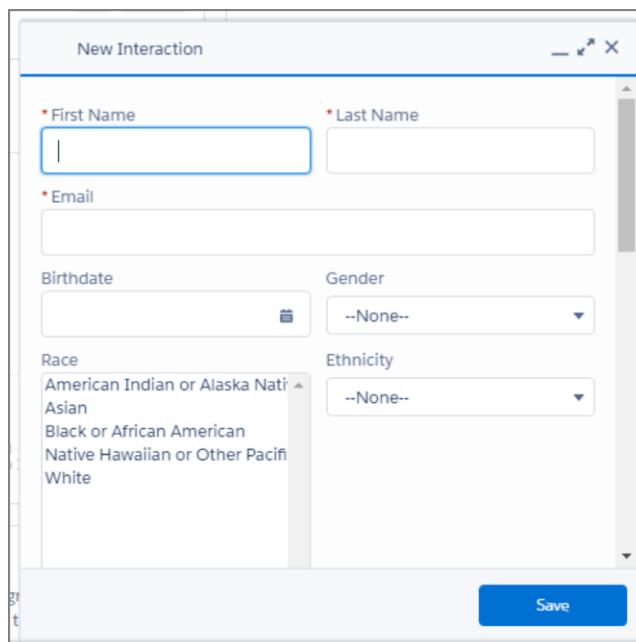
The Global Interaction Action can be used to create an Interaction from any screen. This is helpful when logging an Interaction for a new individual.

**Users should complete the following steps to use this action:**

1. Search for an existing Contact using the global search bar
2. If no existing Contact can be found, click the Global Action menu and select **New Interaction**. See [Navigating the Interactions App](#) if you do not see this button.



The action will appear in the bottom right corner of the user's screen where they can fill it out or view it as a pop-up, like the pop-ups on Lead, Contact, Opportunity and Campaign that you have seen on previous pages:



A screenshot of a "New Interaction" pop-up window. The window has a title bar "New Interaction" with close and minimize buttons. Inside, there are several input fields:

- "First Name": A text input field containing the letter "I".
- "Last Name": An empty text input field.
- "Email": An empty text input field.
- "Birthdate": A date input field with a calendar icon.
- "Gender": A dropdown menu showing "--None--".
- "Race": A dropdown menu showing options: American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, and White.
- "Ethnicity": A dropdown menu showing "--None--".

At the bottom right of the pop-up is a blue "Save" button.

# Customizing Action Layouts

You can add or remove fields from the layout and update default values on actions to better meet your business processes.

**These are the steps you would follow to customize the Contact Interaction Action's layout and predefined field options:**

1. Go to **Setup > Object Manager > Contact > Buttons, Links, and Actions**
2. Find the **New Interaction** action and click on the linked name to open it

SETUP > OBJECT MANAGER Contact			
Details	Buttons, Links, and Actions 20 Items, Sorted by Label		
Fields & Relationships	<a href="#">Find in page</a> <a href="#">New Action</a> <a href="#">New Button or Link</a>		
Page Layouts	Google Search	GoogleSearch	Detail Page Link URL
Lightning Record Pages	List	List	Standard Salesforce.com Page
<b>Buttons, Links, and Actions</b>	New	NewContact	Standard Salesforce.com Page
Compact Layouts	New Interaction	New_Interaction	Create a Record Action Layout Editor
Object Limits			
Record Types			
Detailed Lookups Sidebar			

3. To add a default value for a field, click **New** in the Predefined Field Values section, or edit an existing field's predefined settings by clicking the **Edit** link next to the field you want to update

Contact Action <b>New Interaction</b>		Help for this Page 																																											
<b>Action Detail</b> <div style="display: flex; justify-content: space-between;"> <span><a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Edit Layout</a></span> <span>Object Name <a href="#">Contact</a></span> </div> <table border="1" style="width: 100%;"> <tr> <td>Label</td> <td>New Interaction</td> <td>Standard Label Type</td> <td>New [Record]</td> <td>Action Type</td> <td>Create a Record</td> </tr> <tr> <td>Name</td> <td>New_Interaction</td> <td>Description</td> <td></td> <td>Relationship Field</td> <td>Contact</td> </tr> <tr> <td>Target Object</td> <td>Interaction</td> <td>Icon</td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="3">Create Feed Item</td> <td colspan="3"><input checked="" type="checkbox"/></td> </tr> <tr> <td colspan="3">Success Message</td> <td colspan="3"></td> </tr> <tr> <td>Created By</td> <td>Mathew Ruff</td> <td>7/24/2017 8:45 PM</td> <td>Modified By</td> <td>Mathew Ruff</td> <td>7/24/2017 8:45 PM</td> </tr> <tr> <td colspan="2"></td> <td colspan="2"><a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Edit Layout</a></td> <td colspan="2"></td> </tr> </table>				Label	New Interaction	Standard Label Type	New [Record]	Action Type	Create a Record	Name	New_Interaction	Description		Relationship Field	Contact	Target Object	Interaction	Icon				Create Feed Item			<input checked="" type="checkbox"/>			Success Message						Created By	Mathew Ruff	7/24/2017 8:45 PM	Modified By	Mathew Ruff	7/24/2017 8:45 PM			<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Edit Layout</a>			
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<b>Predefined Field Values</b> <div style="display: flex; justify-content: space-between;"> <span><a href="#">New</a></span> <span></span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Action</th> <th>Field Name</th> <th>API Name</th> <th>Field Type</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td><a href="#">Edit</a>   <a href="#">Del</a></td> <td>Birthdate</td> <td>Birthdate_c</td> <td>Date</td> <td>Contact.Birthdate</td> </tr> <tr> <td><a href="#">Edit</a>   <a href="#">Del</a></td> <td>Contact</td> <td>Contact_c</td> <td>Lookup</td> <td>Contact.Id</td> </tr> <tr> <td><a href="#">Edit</a>   <a href="#">Del</a></td> <td>Email</td> <td>Email_c</td> <td>Email</td> <td>Contact.Email</td> </tr> <tr> <td><a href="#">Edit</a>   <a href="#">Del</a></td> <td>First Name</td> <td>First_Name_c</td> <td>Text</td> <td>Contact.FirstName</td> </tr> </tbody> </table>				Action	Field Name	API Name	Field Type	Value	<a href="#">Edit</a>   <a href="#">Del</a>	Birthdate	Birthdate_c	Date	Contact.Birthdate	<a href="#">Edit</a>   <a href="#">Del</a>	Contact	Contact_c	Lookup	Contact.Id	<a href="#">Edit</a>   <a href="#">Del</a>	Email	Email_c	Email	Contact.Email	<a href="#">Edit</a>   <a href="#">Del</a>	First Name	First_Name_c	Text	Contact.FirstName																	
Action	Field Name	API Name	Field Type	Value																																									
<a href="#">Edit</a>   <a href="#">Del</a>	Birthdate	Birthdate_c	Date	Contact.Birthdate																																									
<a href="#">Edit</a>   <a href="#">Del</a>	Contact	Contact_c	Lookup	Contact.Id																																									
<a href="#">Edit</a>   <a href="#">Del</a>	Email	Email_c	Email	Contact.Email																																									
<a href="#">Edit</a>   <a href="#">Del</a>	First Name	First_Name_c	Text	Contact.FirstName																																									

## Customizing Action Layouts (cont.)

4. Picklist fields can only be defaulted to a specific value from that picklist.  
Actions do not currently support using a formula to set the value



Edit Predefined Field Value for New Interaction  
**Interaction Source**

**Predefined Field Value Edit** Save Cancel

**Field Information**

Field	Interaction: Interaction Source
Field Type	Picklist

**Specify New Field Value**

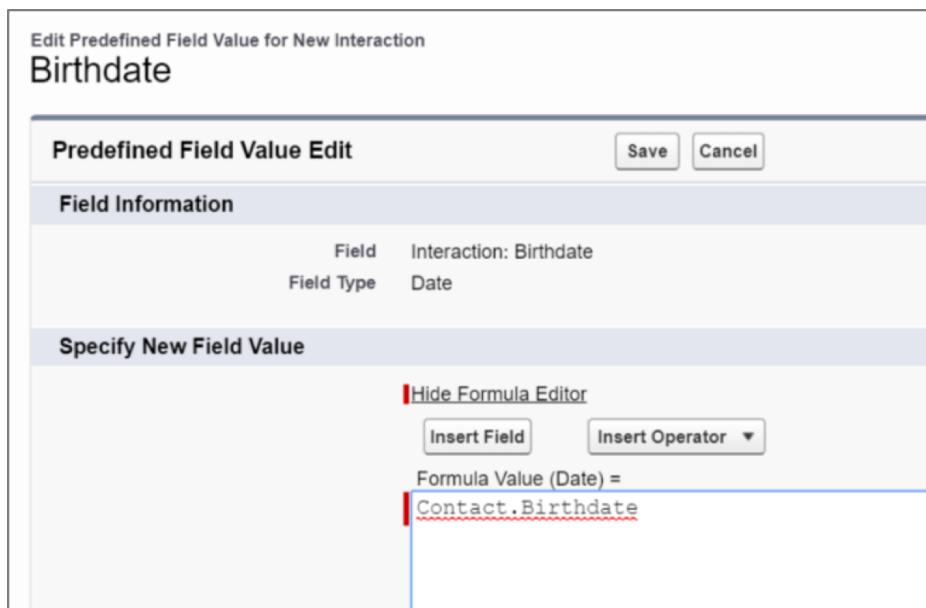
A specific value Manual Entry ▾

Save Cancel



**Note:** Vote on [this Idea](#) to expand the predefined functionality in custom actions to include picklists!

5. Text fields can be defaulted using a formula, such as the one below where Interaction Birthdate is defaulted to whatever value is in the Birthdate field on the Contact



Edit Predefined Field Value for New Interaction  
**Birthdate**

**Predefined Field Value Edit** Save Cancel

**Field Information**

Field	Interaction: Birthdate
Field Type	Date

**Specify New Field Value**

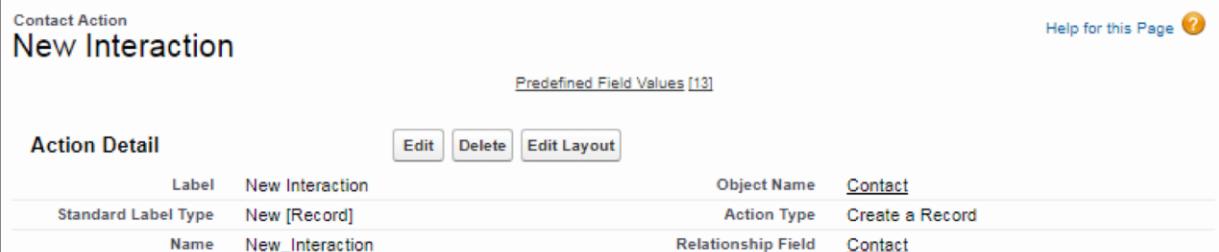
Hide Formula Editor Insert Field Insert Operator ▾

Formula Value (Date) = Contact.Birthdate

Save Cancel

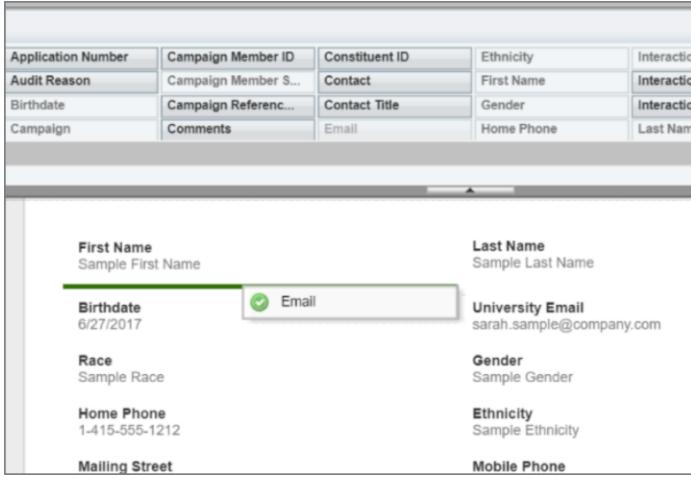
## Customizing Action Layouts (cont.)

- Update the custom action's layout using the **Edit Layout** button on the main action page

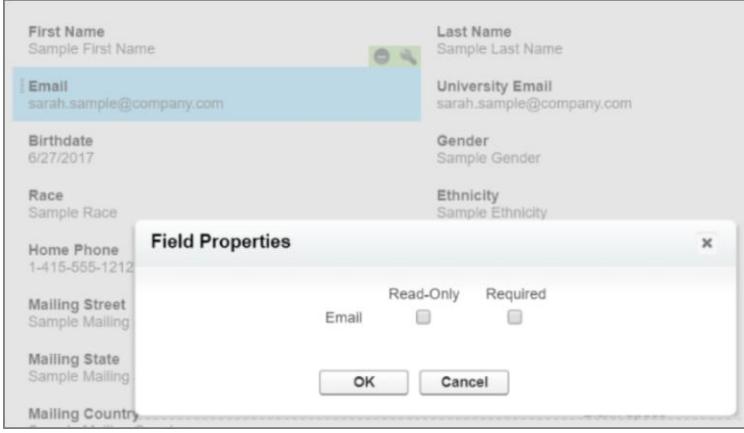


Label	New Interaction	Object Name	Contact
Standard Label Type	New [Record]	Action Type	Create a Record
Name	New_Interaction	Relationship Field	Contact

- Drag fields from the palette to the desired position, remove fields by dragging them back to the palette



- Additionally, mark fields as “Read-Only” or “Required” by hovering over the field and clicking the wrench icon to select these options



**Field Properties**

Email	<input type="checkbox"/> Read-Only	<input checked="" type="checkbox"/> Required
-------	------------------------------------	--

## Customizing Action Layouts (cont.)

7. Remember to always **Save** your changes!



**Note:** Use these same steps to edit the other object-specific actions by going to **Setup > Object Manager > [Object] > Buttons, Links, and Actions**, then editing the “New Interaction” action.

Use these same steps to edit the Global action by going to **Setup > User Interface > Global Actions > Global Actions**, then editing the “New Interaction” action.



## The Affiliation Key

The Affiliation Key fields on both the Interactions and Affiliations objects as well as the Affiliation: Update Upsert Key workflow rule work together to determine when a new Affiliation is created or an existing Affiliation is updated. The Affiliation Key and the corresponding workflow rule can also be customized to better suit your business practices.

For a more technical explanation of how the Interaction's code uses Affiliation Keys, see “Affiliation Creation” and “Affiliation Update” in the [Technical Implementation Guide](#).

## The Affiliation Key Out-of-the-Box

On the Interactions object, there is a formula field called Affiliation Key. There is also a workflow rule and field update that sets the Upsert Key field on the Affiliations object. The Affiliation Key formula field along with the workflow rule allow the Interactions Processor to determine whether to create new Affiliations or edit existing Affiliations.

Out-of-the-box, a new Affiliation is created for each Contact/Account combination. This means that if a Contact has an Affiliation with a Status of Current for a school and an Interaction is logged for the same school with a different Status (e.g. Former), the existing Affiliation will be updated and a new Affiliation will not be created.



# The Affiliation Key Out-of-the-Box (cont.)

## Affiliation Key Formula Field and Workflow Rule

When an Affiliation is created or edited, the “Affiliation: Update Upsert Key” workflow rule runs that sets the Upsert Key field on the Affiliations object to the Contact’s ID plus the Account’s ID that it is associated with the Affiliation.

This is the formula used for the field update:

```
CASESAFEID(hed__Contact__r.Id)+"."+  
CASESAFEID(hed__Account__r.ID)
```

The delivered Affiliation Key formula on Interactions is this:

```
Formula: IF(ISBLANK(Affiliated_Account__c), "",  
"."+CASESAFEID(Affiliated_Account__r.Id))
```

If there is an Affiliated Account specified on an Interaction, this formula returns the value of the Affiliated Account’s 18-digit ID. The Interaction Processor then prepends Contact.Id once it finds or creates a Contact. If the Affiliation Key field on the Interaction matches the Upsert Key on an existing Affiliation, the Interaction Processor will update the matched Affiliation. If the fields do not match, a new Affiliation record will be created.

# The Affiliation Key Out-of-the-Box (cont.)

## Updating Affiliation Key and Workflow

You may want to update how Affiliations are matched to better fit your business processes. For example, you may want to create separate Affiliations for a Contact/Account combination if the Contact's Role changes (e.g. Student vs. Advisor).

To make this change, you need to:

1. Update the Affiliation Key formula field on Interactions by appending Role (or another Affiliation field, depending on your business process)

```
IF(ISBLANK(Affiliated_Account__c), "",  
"."+CASESAFEID(Affiliated_Account__r.Id)  
+"."++(Affiliation_Role__c))
```

2. Update the Upsert Key: Set to Contact.Account field update by appending Role (or another Affiliation field)

```
CASESAFEID(hed__Contact__r.Id)+".+"  
CASESAFEID(hed__Account__r.ID) +"."++(hed__Role__c)
```

3. Click **Activate** to turn on the workflow rule
4. Test your new configuration



**Note:** After installing the package or making updates to the workflow rule, remember to **Activate** the rule so it runs as expected. See the [Activate Workflow Rules](#) section to learn how.

## The Opportunity Key

Like Affiliation Key, the Opportunity Key field on Interactions and Opportunities and the Opportunity Key Workflow Rule work together to control how the Interactions code matches on and updates Opportunities. For a full explanation of the Opportunity Key and how to fit it into your recruitment model, see “Opportunities for Recruitment” in the [User Guide](#). For a more technical explanation of how the Interaction’s code uses Opportunity Keys, see “Matching with Opportunity Key” in the [Technical Implementation Guide](#).

## The Opportunity Key Out-of-the-Box

The Opportunity Key formula field on Interactions along with a workflow rule and field update allow the Interactions process to match on Opportunities for both a centralized (one Opportunity per Career and Term) and decentralized (one Opportunity per Career, Interest, and Term) recruitment model.

# The Opportunity Key Out-of-the-Box (cont.)

## Opportunity Key Formula Field on Interactions

If the Career field on the associated Academic Interest (or Recruitment Interest if Academic Interest is blank) is Undergraduate, the Opportunity Key field will use the following information to match to an Opportunity record:

Contact.Id + . + Undergraduate + . + Term.Id

If the Career field on the associated Academic Interest (or Recruitment Interest if Academic Interest is blank) is Graduate, the Opportunity Key field will use the following information:

Contact.Id + . + Undergraduate + . + Academic Interest.Id (or Recruitment Interest.Id if Academic Interest is blank) + . + Term.Id

If this setup matches your recruitment business processes, there is no need to make changes to the key.

# The Opportunity Key Out-of-the-Box (cont.)

## Activating Opportunity Key Update Workflow

The Opportunity: Update Opportunity Key workflow rule runs every time an Opportunity record is edited and the Opportunity Key field is not equal to the expected value based on the Career field on the Academic Interest (or Recruitment Interest if Academic Interest is blank). This is important if your organization allows users to update or create Opportunities outside the Interactions process.

Workflow Rule Detail		<a href="#">Edit</a>	<a href="#">Clone</a>	<a href="#">Deactivate</a>
Rule Name	Opportunity: Update Opportunity Key	Object	Opportunity	
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and every time it's edited	
Description	Sets the Opportunity Key based on the Career, Recruitment Interest or Academic Interest, and Term, according to the formula used in the Opportunity Key field on the Interactions object.			
Rule Criteria	<pre>/*The below formula allows for a centralized and decentralized recruitment model.*/ /*If the Academic Career from the Academic Interest = Undergraduate or the Academic Interest is blank and the Recruitment Interest Career = Undergraduate, this formula uses the centralized model (one Opportunity per Term). If the same is true for the Graduate Career, this formula uses the decentralized model (one Opportunity per Opportunity Plan and Term). Otherwise, the formula is blank, which means the Opportunity is missing important information.*/ Opportunity_Key__c &lt;&gt;&gt; CASESAFEID(Contact__r.Id)+ IF(Academic_Interest__c + Recruitment_Interest__c = "", "",  /*If the Academic Interest Career = Undergraduate, or Academic Interest is blank and the Recruitment Interest Career = Undergraduate, this formula uses the centralized model (one Opportunity per Term)*/ IF(OR(ISPICKVAL(Academic_Interest__r.Career__c, "Undergraduate"), AND(ISBLANK(Academic_Interest__c), ISPICKVAL(Recruitment_Interest__r.Career__c, "Undergraduate"))), ".Undergraduate."+Term__r.Id,  /*Otherwise, this formula uses the decentralized model (one Opportunity per Academic Interest or Recruitment Interest and Term)*/ ".Graduate." +  /*If there is no Academic Interest, the decentralized model adds the Recruitment Interest Id. Otherwise, the model uses the Recruitment Interest ID from the Academic Interest, or if there is none, the Academic Interest ID is used as a last resort. Most Academic Interests should have a Recruitment Interest ID to ensure a smooth transition from inquiry to application.*/ IF(ISBLANK(Academic_Interest__r.Id), Recruitment_Interest__r.Id, IF(ISBLANK(Academic_Interest__r.Recruitment_Interest__c), Academic_Interest__r.Id, Academic_Interest__r.Recruitment_Interest__r.Id)+"."+Term__r.Id))</pre>			

You will need to activate this rule after installing the package:

1. Go to **Setup > Process Automation > Workflow Actions > Workflow Rules**
2. Open the “Opportunity: Update Opportunity Key” workflow rule by clicking on the name
3. Click the **Activate** button

# The Opportunity Key Out-of-the-Box (cont.)

## Updating Opportunity Key and Workflow

If the keys provided out-of-the-box do not represent unique Opportunities for your Undergraduate or Graduate recruitment processes, you will need to update the Opportunity Key formula field on Interactions and the Opportunity: Update Opportunity Key workflow rule and field update.

For example, if your university does not plan to recruit for Graduate programs in Salesforce, you will need to update the key.

**Follow these steps to use only the centralized process and ignore Career:**

1. Go to Setup > Object Manager > Interaction > Fields and Relationships
2. Edit the “Opportunity Key” formula field
3. The new key should be as follows (comments are surrounded by /\* \*/ and not necessary for the functionality of the formula)

```
/*The below formula allows for a decentralized recruitment model.*/
```

```
/*If both Academic Interest and Recruitment Interest are blank, the formula is blank, which means the record is missing important information and no Opportunity will be created.*/
```

```
IF(Academic_Interest__c + Recruitment_Interest__c = "", "",  
"."+CASESAFEID(Term__r.Id))
```

# The Opportunity Key Out-of-the-Box (cont.)

## Updating Opportunity Key and Workflow (cont.)

4. After saving the formula changes, go to **Setup > Process Automation > Workflow Actions > Workflow Rules**

5. Edit the Opportunity: Update Opportunity Key Workflow Rule to match the 18-digit Contact ID followed by the Opportunity Key from [step 3](#)

Opportunity\_Key\_\_c <> CASESAFEID(Contact\_\_r.Id) + "." +  
CASESAFEID(Term\_\_r.Id)

6. After saving the workflow rule changes, go to **Setup > Process Automation > Workflow Actions > Field Updates**

7. Edit the “Opportunity Key: Set Based on Career” Field Update

8. Change the name of the update rule if needed (example: “Opportunity Key: Set to Contact + Term”)

9. Set the formula to match the 18-digit Contact ID followed by the Opportunity Key from [step 3](#)

CASESAFEID(Contact\_\_r.Id) + "." + CASESAFEID(Term\_\_r.Id)

10. Click **Save** and make sure the associated workflow rule is **Active**



# Connect an Additional Object

It is possible to add functionality to the Interactions process by connecting an additional object. While it involves click configuration, it also requires a developer who understands the Apex code.

**Please keep the following in mind when considering adding processes to the Apex code:**

- Additional processes add API Calls and could slow down processing times when importing or manually creating Interactions. Always follow Salesforce Best Practices to reduce the impact and avoid hitting limits. See the [Trigger and Bulk Request Best Practices](#) and [Execution Governors and Limits](#) Developer Guide articles for additional information.
- Salesforce requires unit tests that cover a minimum of 75% of the code before it can be deployed in Production, but a higher percentage is preferred. Consider the best practices outlined in the [How to Write Good Unit Tests Apex Developer](#) Guide article.

# Connect an Additional Object (cont.)

Here are the required steps:

1. Log into a sandbox environment (Apex cannot be edited directly in Production)
2. Create the new object or identify an existing object
3. Add fields to the object, if applicable
4. Add matching fields to the Interaction object
5. Update the Apex code with the additional processes
6. Update the Apex test code with additional tests
7. Update the Target Object API Name picklist on Interaction Mappings to include the API Name for the new object
8. Create Interaction Mapping records for the fields added. See the “Interaction Mappings” section of the [Technical Implementation Guide](#) for more information



# Connect an Additional Object (cont.)

For more information about developing in Apex, review the following Salesforce resources:

## Trailhead Modules:

- [Apex Basics & Database](#)
- [Apex Triggers](#)
- [Apex Testing](#)
- [Asynchronous Apex](#)

## Developer Guides:

- [Apex Quick Start](#)
- [Apex Developer Guide](#)
- [Trigger and Bulk Request Best Practices](#)
- [Execution Governors and Limits](#)
- [How to Write Good Unit Tests Apex](#)



# User Permissions and Security Models

## Delivered Permission Set

Interactions for Student Recruitment comes with the permission set “Create Interactions.” This permission set includes access to the app, objects and fields a user needs to create Interaction records in a standard way. The permission set also includes access to view (not edit or create) Interaction Mapping records. Feel free to edit this permission set, assign it to users on a case-by-case basis, or use it as a starting point for creating or adding to a user profile.

Follow these steps to access the permission set:

1. Go to **Setup > Users > Permission Sets**
2. Select **Create Interactions**
3. Review or make updates and **Save**



# How Interactions Handles Your Security Models

Different universities have different needs when it comes to data security. The way this package uses the Opportunity object, for example, could pose security concerns for some universities because these records hold information concerning the potential student's recruitment interests and, possibly, sensitive personal information. The departments within your university may be open to sharing their Opportunity data or they may want to keep it to themselves.

The Interaction Processor has full access to all records in Salesforce. This means if an Interaction is created by a user that matches a Contact they cannot see because of sharing settings, that Contact will still be updated. The out-of-the-box design assumes if a person has access to edit an Interaction field and that field is mapped to another field in the system, it has permission to write to it.

If this design does not meet your security requirements, you will need to update the way the Apex code is written to consider field-level security as well as sharing rules for the user who kicks off the Interaction Process. You may instead want to limit the users who have access to update Interactions, or at least remove their edit access to Interaction fields that are mapped to sensitive fields.

For more information on Security in Salesforce, see the [Data Security](#) Trailhead Module.



# Reports and Dashboards

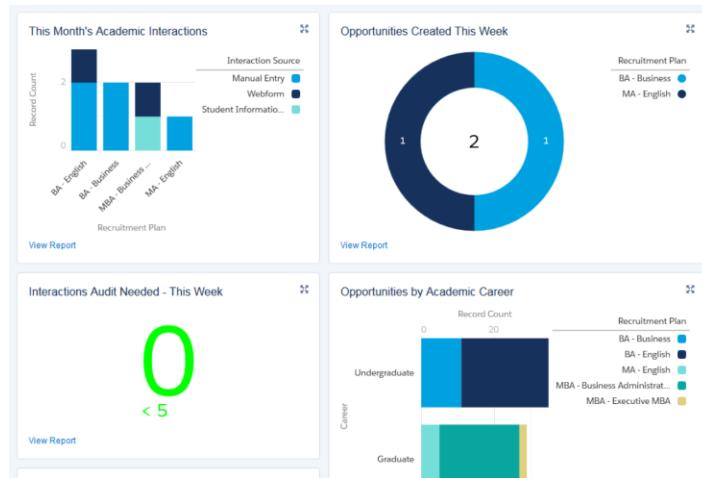
Included with the package are some new report types, sample reports and two dashboards.

The delivered report types are:

Report Type Name	Objects (in order of primary, secondary, tertiary)	Report Type Category	Sample Report Name(s) and Use Case Example
Campaigns with Contacts with Opportunities	Campaign, Contacts, Opportunities	Campaign	This report type can be used to bring in data from Campaigns, Contacts 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.

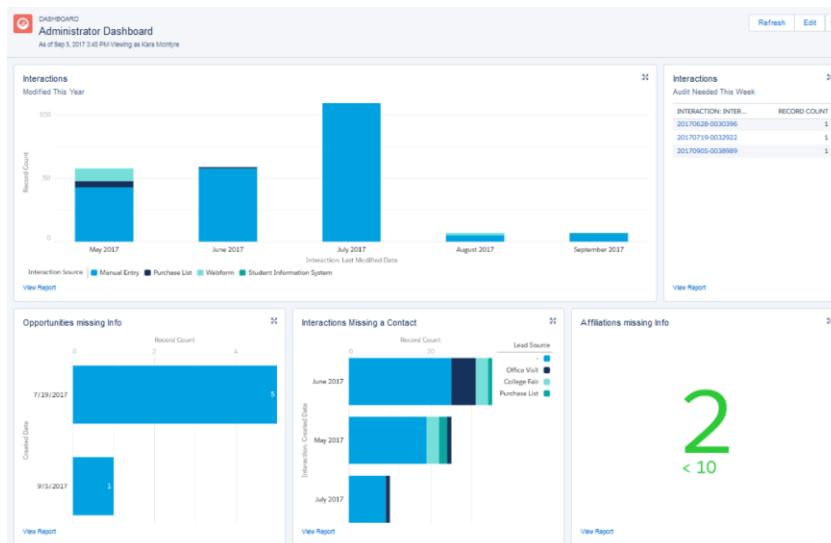
## Recruiter Dashboard

The Recruiter Dashboard was designed with recruiters' needs in mind. It contains reports on incoming Interactions by Creation Date, Opportunities by Creation Date and Interest, Opportunities by Academic Career, Campaign reports, Lead Source reports, and more.



## Administrator Dashboard

The Administrator Dashboard was designed to help administrators catch problems with configuration, data loads, or manual entry of Interactions after implementing Interactions for Student Recruitment.



# Test Your Configuration

The following are the minimum tests you should complete to confirm your configuration is working. Depending on the extent of your Interaction Mappings and customizations, additional testing may be needed.

## Create a New Contact Using an Interaction

1. Click on the **Global Actions** dropdown and select ‘New Interaction’
2. Fill out any fields you want to test, making sure to enter values in the fields required for your matching rules, and **Save** the record
3. A confirmation message should appear to show the record was created, with the record name appearing as a green link. **Click on this link** to open the Interaction record.
4. Confirm the Interaction Status is ‘Imported,’ all expected values appear in the fields you filled out, and there is a link to the created Contact in the bottom left of the record
5. Click on the **linked Contact** and confirm that all expected fields are filled out there as well



**Note:** If the “Interaction Status” is not ‘Imported,’ confirm all required fields on the records you plan to create are filled out. If any values are missing on the Interaction record, confirm the Global Action is configured correctly. If any values are missing on the Contact, confirm there are Interaction Mapping records for the missing fields. If any fields are missing from the Interaction or Contact, confirm the Page Layouts are correct.

# Update a Contact Using an Interaction

1. Click on the **Global Actions** dropdown and select 'New Interaction'
2. Fill out any fields you want to test with slightly different information, making sure to enter the same values from [Create a new Contact using an Interaction](#) in the fields required for your matching rules, and **Save** the record
3. A confirmation message should appear to show the record was created, with the record name appearing as a green link. **Click on this link** to open the Interaction record.
4. Confirm the Interaction Status is 'Imported,' all expected values appear in the fields you filled out, and there is a link to the created Contact in the bottom left of the record
5. Click on the **linked Contact** and review that all expected fields are updated there as well
6. Click on the **Related** tab on the Contact and find the Interactions Related List. There should be two Interactions Records, one from Test 1 and one from this current test



**Note:** If the Interaction creates a new Contact instead of updating the existing Contact, confirm all fields required for your Lead and Contact matching rules have values that match the existing Contact, check the standard Lead Mappings on the Lead Object, make sure all fields have Interaction Mappings, and review the matching rules to confirm the Lead rule matches the Contact rule and they are set up as outlined in this document.

# Create an Opportunity Using an Interaction

1. Go to a Contact record and click on the **New Interaction** Action
2. Fill out any fields you want to test, making sure to enter the values required for the Opportunity Key
3. A confirmation message should appear to show the record was created, with the record name appearing as a green link. **Click on this link** to open the Interaction record.
4. Confirm the Interaction Status is ‘Imported,’ all expected values appear in the fields you filled out, and there is a link to the created Contact and Opportunity in the bottom left of the record.
5. Click on the **linked Contact** and review that all expected fields are updated there as well
6. Click on the **Related** tab on the Contact, find the Opportunities Related List, and click on the **Opportunity** that should be there
7. Review the fields on the Opportunity to confirm all expected fields are updated there
8. Look at the related list section to the right of the record and confirm the Contact is listed in the Contact Roles section



**Note:** If the Interaction is not at ‘Imported,’ confirm all required fields for Opportunity have been filled out, and Opportunity key on Interaction is the same as the Opportunity Key being set through the workflow rule. If the Opportunity is missing values, confirm the fields have Interaction Mappings, the Action is configured correctly, and all values from the Interaction are acceptable. If the Opportunity is missing fields, review the page layout.

# Update an Opportunity Using an Interaction

1. Go to a Contact record and click on the **New Interaction** Action
2. Fill out any fields you want to test, making sure to enter the same values required for the Opportunity Key from [Create an Opportunity using an Interaction](#)
3. A confirmation message should appear to show the record was created, with the record name appearing as a green link. **Click on this link** to open the Interaction record.
4. Confirm the Interaction Status is ‘Imported,’ all expected values appear in the fields you filled out, and there is a link to the Contact and Opportunity in the bottom left of the record
5. Click on the **linked Contact** and review that all expected fields are updated there as well
6. Click on the **Related** tab on the Contact, find the Opportunities Related List, and click on the Opportunity that should be there, confirming there is no duplicate
7. Review the fields on the Opportunity to confirm all expected fields are updated there



**Note:** If the Interaction created a new Opportunity instead of updating an existing one, confirm the Opportunity key on Interaction is the same as the Opportunity Key being set through the workflow rule, and the formulas match the key on the existing Opportunity.

# Create an Affiliation Using an Interaction

1. Go to the Opportunity record and click on the **New Interaction** Action
2. Fill out any fields you want to test, making sure to enter the values required for the Affiliation Key
3. A confirmation message should appear to show the record was created, with the record name appearing as a green link. **Click on this link** to open the Interaction record.
4. Confirm the Interaction Status is ‘Imported,’ all expected values appear in the fields you filled out, and there is a link to the created Contact in the bottom left of the record
5. Click on the **linked Contact** and review that all expected fields are updated there as well. If you set the Affiliation as Primary, confirm the Account you used is linked in the appropriate Primary Affiliation field on the Contact.
6. Click on the **Related** tab on the Contact, find the Affiliations Related List, and click on the Affiliation that should be there
7. Review the fields on the Affiliation to confirm all expected values are there

**Note:** If the Affiliation was not created or values are missing, confirm all required fields are filled out and have Interaction Mappings. If Affiliation fields are missing, check the page layout. If values are missing or not what is expected, confirm the Action on Opportunity is configured correctly and all values from the Interaction are formatted correctly.



# Update an Affiliation Using an Interaction

1. Go to the Opportunity record and click on the **New Interaction** Action
2. Fill out any fields you want to test with slightly different values that are not part of the key (example: Role), making sure to enter the same values required for the Affiliation Key from [Create an Affiliation Using an Interaction](#)
3. A confirmation message should appear to show the record was created, with the record name appearing as a green link. **Click on this link** to open the Interaction record.
4. Confirm the Interaction Status is ‘Imported,’ all expected values appear in the fields you filled out, and there is a link to the created Contact in the bottom left of the record
5. Click on the **linked Contact** and review that all expected fields are updated there as well. If you set the Affiliation as Primary, confirm the Account you used is linked in the appropriate Primary Affiliation field on the Contact.
6. Click on the **Related** tab on the Contact, find the Affiliations Related List, and click on the Affiliation that should be there, confirming there is not a duplicate now
7. Review the fields on the Affiliation to confirm all expected values are there

 **Note:** If the Interaction Status is not at ‘Imported,’ confirm the Affiliation Key field on the Interaction is built the same way as the Affiliation Key Workflow Rule. If the Interaction created a new Affiliation instead of updating an existing one, confirm the values entered from the Affiliation Key match the original Affiliation.

# Add a Campaign Member Using an Interaction

1. Go to a Campaign record and click on the **New Interaction** Action
2. Fill out any fields you want to test. If you want to create a new Contact, use new values, otherwise use the same values from [Update a Contact Using An Interaction](#). Make sure the Campaign is set, a Campaign Member Status is set, and it is a value that is part of the Campaign.
3. A confirmation message should appear to show the record was created, with the record name appearing as a green link. **Click on this link** to open the Interaction record.
4. Confirm the Interaction Status is ‘Imported,’ all expected values appear in the fields you filled out, and there is a link to the created Contact in the bottom left of the record
5. Click on the **Linked Contact** and review that all expected fields are updated there as well
6. Click on the **Related** tab on the Contact, find the Campaign History Related List, click on the down arrow at the far right of the Campaign Member that should be there, and select **Edit** (this is the easiest way to view the record)
7. Review the fields on the Campaign Member to confirm they are there, and select **Cancel** to close the record

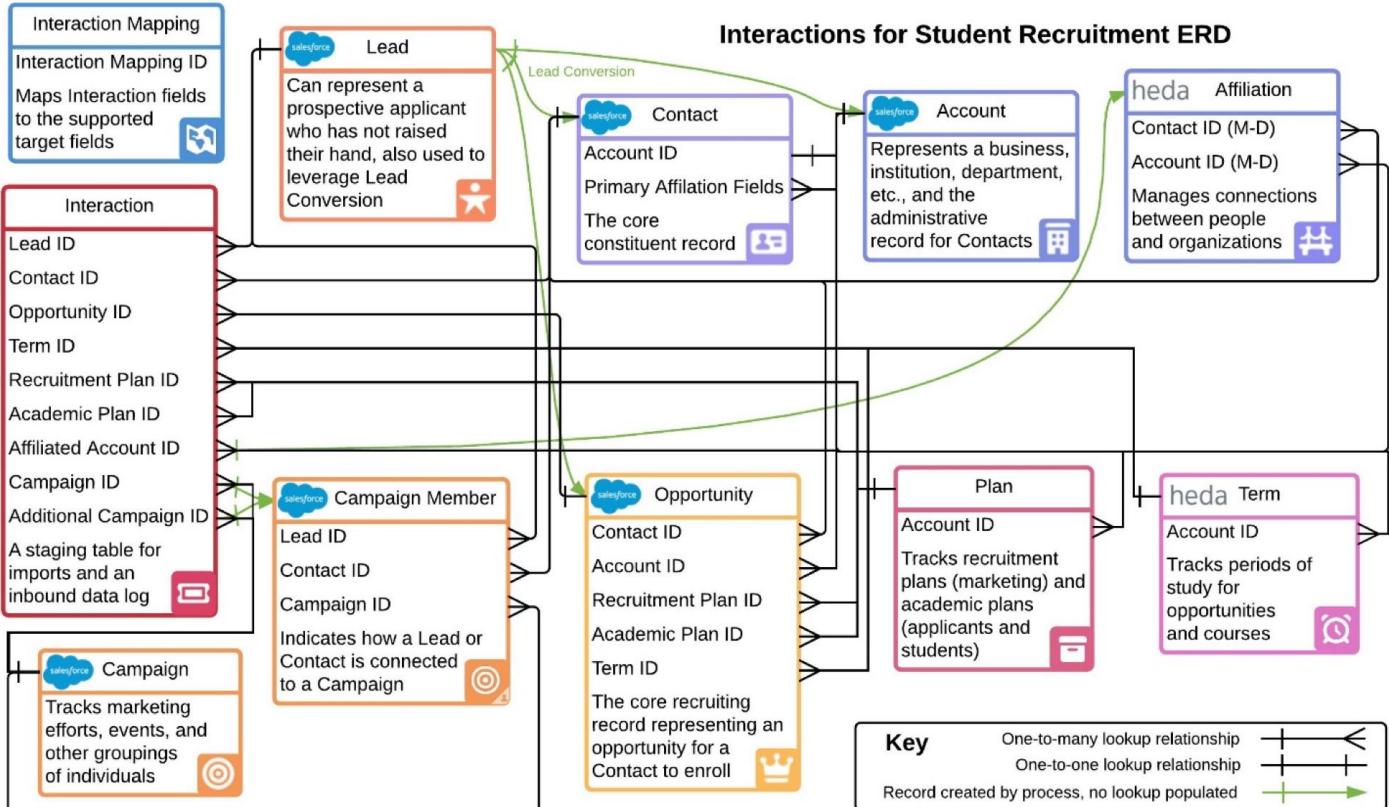
 **Note:** If the Campaign Member was not created, confirm the Campaign Member Upsert Key on Interactions is set the same way as the Campaign Member Key Workflow rule. If the Campaign Member Status is incorrect, go to the Campaign, click on the **Related** tab, and confirm the status you chose is listed as an available status. If the Campaign Member is missing values, confirm the fields have Interaction Mappings. If the Campaign Member is missing fields, check the page layout.

# Appendix

## Interactions for Student Recruitment ERD

The icon in the top left of each object box indicates whether the object is a standard Salesforce object or a HEDA custom object. If there is no icon, the object is a new custom Interactions for Student Recruitment object.

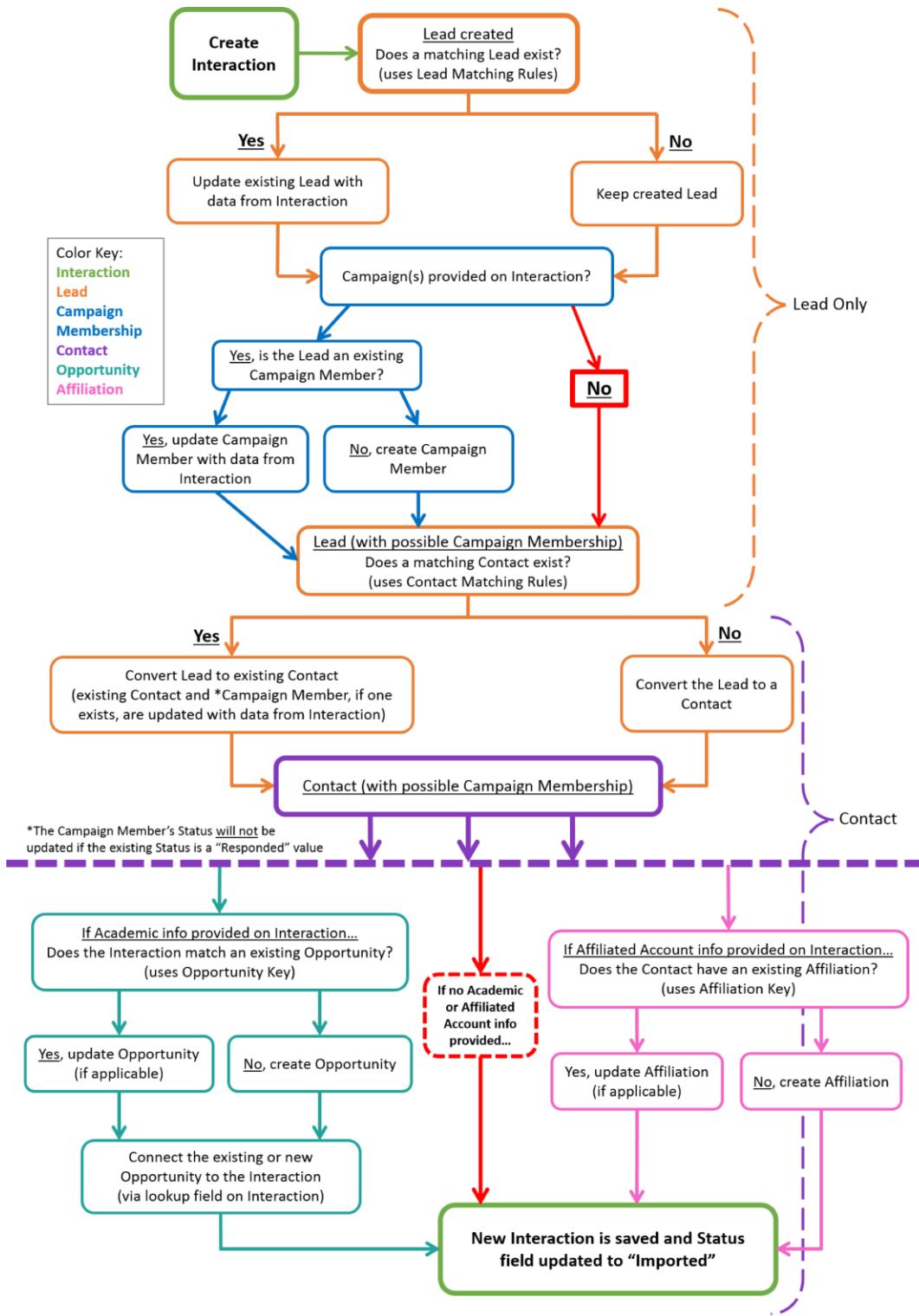
Additionally, green lines represent the process of record creation.





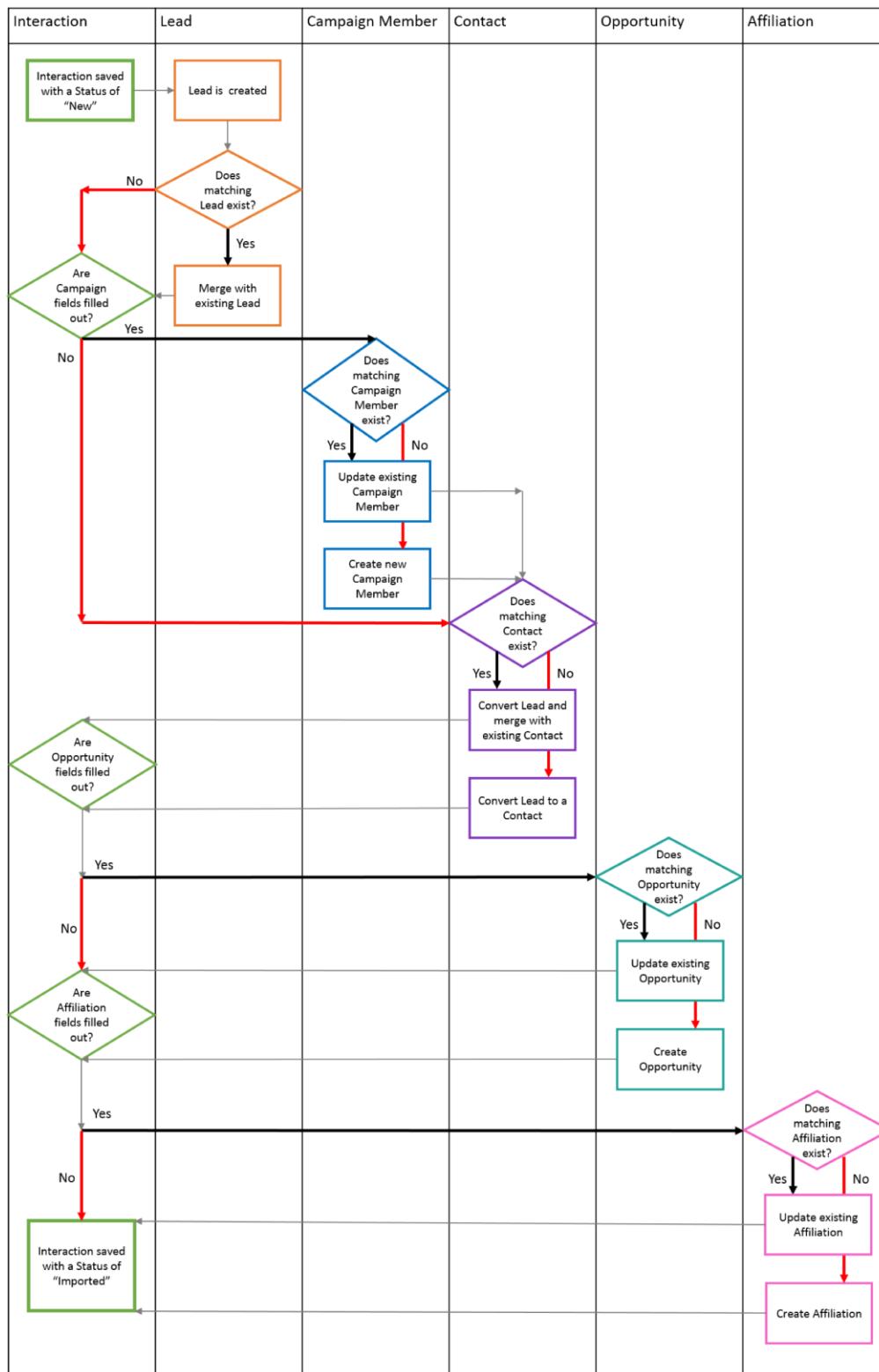
# Interaction Model - Flow Chart

This chart is one of two representations of the order of the Interactions code.



# Interaction Model – Swim Lane Diagram

This chart is one of two representations of the order of the Interactions code.



## Interactions Data Dictionary

The Data Dictionary can be found [here](#) in the Interactions for Student Recruitment GitHub repository.

## Interactions for Student Recruitment Unmanaged Package

The links for the downloadable, unmanaged package are located in the [GitHub Repository](#). There are two links, one for Sandbox Installation and one for Installation in a Production or Developer Org.

## Interactions for Student Recruitment GitHub repository

The GitHub repository, containing all documentation and custom code associated with Interactions for Student Recruitment, can be found [here](#).

## Other Resources

- [User Guide](#)
- [Technical Implementation Guide](#)
- [HEDA Documentation](#)
- [Power of Us Hub Chatter Group](#)