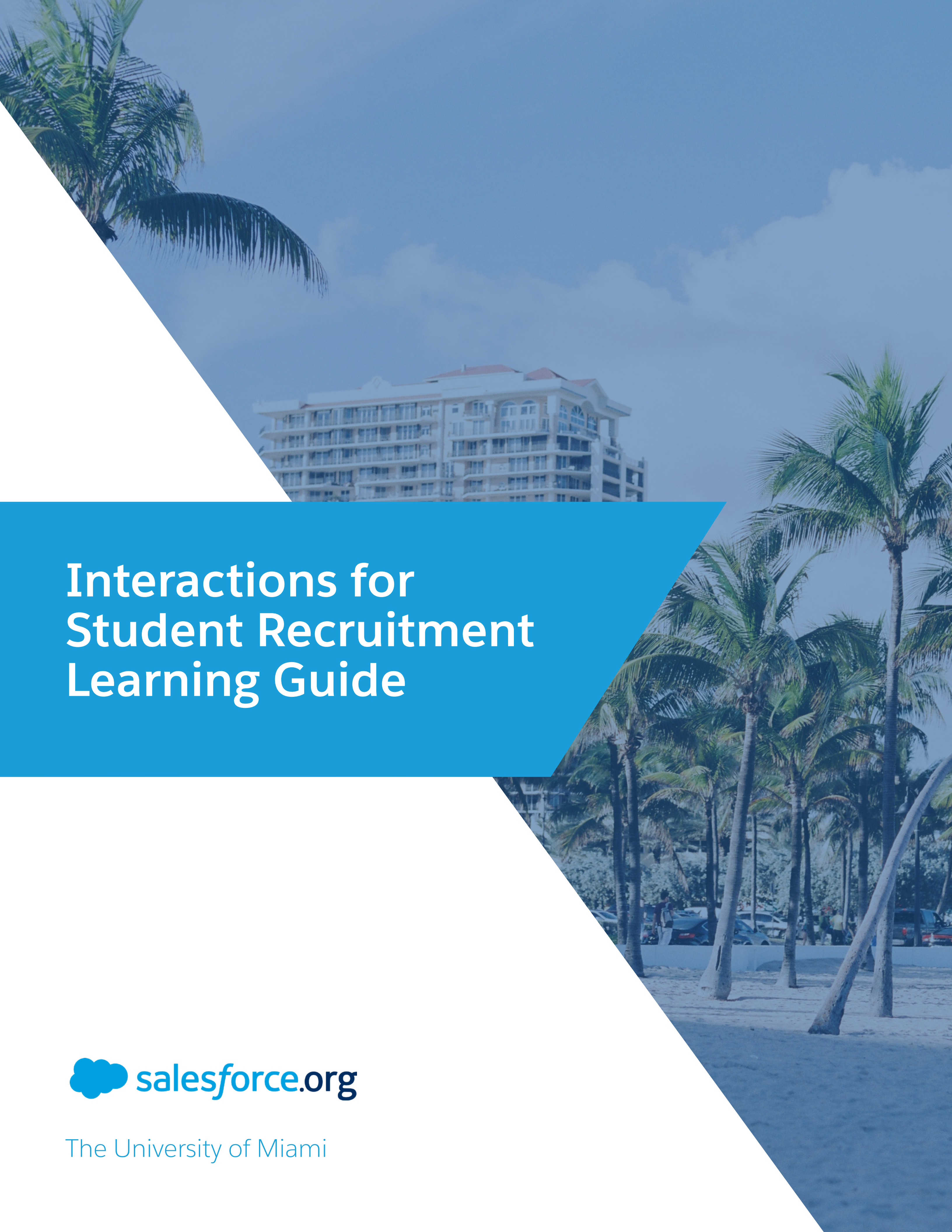

# Interactions for Student Recruitment Learning Guide

The University of Miami

# Learning Guide Contents

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## Unit 3.2 – Create and Report on Campaign Members and Interactions

# Chapter 1 – Interaction Basics

## Unit 1.1: Get Started with Recruiting in Salesforce – Higher Ed Recruitment Essentials

### Learning Objectives

- Describe the recruitment lifecycle for one university, from inquiry to application to enrollment
- Describe the challenges and opportunities universities face in recruitment

Salesforce has been shaping the recruitment processes of higher education institutions for years. In this guide, we will follow the story of Connected University (CU), an institution looking for ways to improve the effectiveness and efficiency of their recruitment and admission teams.

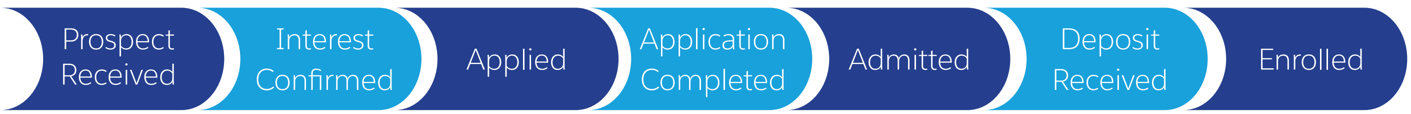
## Meet Connected University (CU)

CU receives around 16,000 applications a year and has an annual enrollment of 10,000 students. The university offers over 60 bachelor's degrees and 40 master's degrees organized within schools and colleges that support both undergraduate and graduate students. Courses are offered during the spring and fall terms, with some options available in the summer. The graduate programs recruit year-round whereas the undergraduate recruitment team primarily focuses on recruiting for the traditional fall or spring semesters.

CU, as a whole, collects around 100,000 inquiries from potential students every year from a vast variety of sources including event registrations, web form submissions, in-person office visits, and college assessment companies. The recruiters at CU must respond quickly to potential student's requests for more information with personal, helpful and exciting information through methods that are convenient to these potential students. Keeping these requests in context of a potential student's record helps recruiters to build meaningful rapport and ensure they are focusing on impressive prospects who are likely to enroll if admitted to the University.

Capturing accurate data is critical, but so is the ability to use it efficiently. This is where automation comes in to play, so CU's recruiters can spend time on the most important aspects of building relationships with prospective students, like making sure they are matching the right student with the right program. Today's potential students are looking for a university that is both modern and responsive as well as being able to help them reach their educational and personal goals.

CU's recruitment and admission process includes several stages. The first step for any admissions team at CU is to reach out to prospects and confirm that they are truly interested in the University and the career or program they represent. Next, the individual recruiters endeavor to build-up their prospects' excitement and interest by inviting them to events, providing them with personalized information, connecting them with faculty or alumni, and ultimately encouraging them to apply. These same recruiters then assist in the application process, helping applicants to gather and submit the necessary documents. Submitted applications then go through a review process and applicants who are admitted are asked to pay a deposit to confirm they will attend the University. After the deposits are received, the advising staff takes over and assists in the enrollment process for new students.




This general process of prospect to applicant to student is the same throughout the University, but CU has very different application practices if potential students are applying for undergraduate versus graduate admission. Undergraduate student hopefuls submit one application for admission to CU and work with a single admissions team that supports all schools and colleges, while graduate student hopefuls apply to the degree program they wish to pursue within a school or college at CU and work with that specific school's admissions team. This means that a potential graduate student could submit two applications to CU, one for an MBA program at the School of Business and another for an MA program at their School of Music. In comparison, a potential undergraduate student submits a single application to CU, regardless of their varied interests.

## CU's Recruitment Challenges and Opportunities to Grow

As you have seen, CU is looking for students who are great candidates for their programs, and are not only ready to learn and grow, but also excited to pursue their passions. Admissions teams need to build meaningful relationships with potential students to understand their goals, and encourage them to apply based on their unique needs and interests.

Until now, these teams at Connected University have tracked much of their work in silos using various tools (including post-it notes still!) and databases. But when potential students communicate with the university, they expect the representatives they reach to have a much deeper understanding of their history and status. In addition, although the University has an overarching recruitment and admissions process, there are some key distinctions for undergraduate versus graduate admission. Flexibility and the ability to give different teams the support and access to data they need is critical.

With this modernization in mind, the University is looking for ways to better provide the following:

- Access to a 360-degree view of potential students to support individually tailored recruiting
- Customized recruitment processes for the undergraduate and graduate departments
- Ability to share information across departments
- More relevant data for reporting
- Measurement of recruitment efforts throughout the University

Ultimately, CU is looking for a solution that is easy and comprehensive for recruiters as well as being simple for system administrators to implement and maintain.

## Where to Start?

Due to the number of requests for information and applications that CU receives, the different recruiting processes across undergraduate and graduate programs, and their desire to remain current and efficient, CU's stakeholders are on the hunt for an elegant and cohesive solution. To find a solution both easy to implement and use that is also industry-proven and meets all their requirements sounds like a monumental task, doesn't it?

The good news is there are two tools available to help CU and all universities looking to revamp how they manage potential and current student data: Salesforce's Education Data Architecture (EDA) and Interactions for Student Recruitment.

EDA forms a foundation to help colleges and universities leverage Salesforce for their unique needs through Higher-Ed based language, data modeling, and functionality including custom objects, fields, and Apex processes. It is a flexible framework that supports the use of Salesforce as a system of engagement within the current student lifecycle. Interactions for Student Recruitment focuses on delivering a data model and functionality to support recruitment by expanding on EDA's framework and adding its own custom objects, fields, and Apex processes.

With the help of these products and the Salesforce platform, the stakeholders at CU know they can achieve their goals. Join us in the next unit as we follow CU's new Salesforce system administrator, Stella, on her journey to learn how to transform Connected University's recruitment processes using Salesforce, EDA, and Interactions for Student Recruitment.

## Unit 1.2: Get Started with Interactions

### Learning Objectives

- Describe the benefits of managing recruitment data using Interactions
- List and describe the standard Salesforce and EDA objects and how they are used for recruitment
- Describe how the Interactions data model relates to the Salesforce and EDA data models
- Understand how the Interactions process leverages EDA

## How Interactions Can Help CU

In the last unit, you met CU, a higher education institution that is ready to transform their recruitment using Salesforce, EDA, and Interactions for Student Recruitment. Now, meet Stella, the newest member of the Connected University family and their new Salesforce system administrator! Stella knows they need an innovative, strong, and flexible CRM tool to accomplish their needs and that Salesforce's platform and EDA will deliver when it comes to current students. But will Interactions for Student Recruitment meet all their needs when it comes to recruitment?

Let's take a look at the specific requirements Stella gathered from the teams that are most interested in adopting Salesforce for recruitment and how Interactions can fulfill each requirement.

### The ability to set up multiple recruitment processes

Stella is looking forward, and she knows the future is a campus-wide CRM. Granting the appropriate access to the same set of data to every department involved in recruitment increases efficiency, empowers employees, and provides a better experience for prospects, applicants, and students. Stella has also discovered that undergraduate and graduate recruitment processes vary greatly in terms of when they are recruiting and especially how they handle applications, as you saw in the previous unit. A flexible platform with the ability to meet both group's needs is essential.

Through customizable matching keys for Opportunities, the central recruitment record where academic interest (and much more) is tracked, Interactions for Student Recruitment allow for different matching rules across undergraduate and graduate Opportunities while also leveraging all of the awesome baked-in functionality of Opportunities.

### A streamlined suspect to prospect to applicant process

Through documenting admissions team's business processes at CU, Stella has realized that the teams treat names acquired through a purchase list very differently from individuals who have directly reached out to the University to request information. This is in part due to purchase list names, called 'suspects' by the admissions teams, have minimal data associated to them whereas data for individuals who "raise their hands", called 'prospects', is much more informative about the potential student. Therefore, the teams usually send emails in mass to suspects and require more personalized communication to be sent to prospects. She also determines that there needs to be a process to convert suspect records to more robust records for prospects, including the ability to relate other records such as applications.

With Stella's stellar Salesforce background, she decides that suspects most resemble Salesforce's Leads object and individuals who have reached out to CU, prospects, are a good fit for Salesforce's Contacts object. Further, she thinks Opportunities could be used as application records to take advantage of Opportunity's native functionality. By automating Salesforce Lead Conversion and leveraging Opportunity Sales Processes, Interactions for Student Recruitment will allow Stella's end-users (namely, recruiters) to use their time to their greatest advantage and give focus to the different populations they communicate with.

If your university's business processes do not support the use of Leads, don't fret! The use of Leads is not a requirement to use Interactions for Student Recruitment.

### Configurable duplicate prevention

Another pain point for the departments is data management. Multiple data sources and inconsistent business processes have created duplicate and data cleanliness issues for many of the recruitment teams. Interactions for Student Recruitment uses Salesforce's native Duplicate Management features as well as custom record keys to enforce CU's matching rules when loading and creating records manually.

### A simplified data loading process

Stella knows that when it comes to integrating other databases with Salesforce, bringing in web form responses, or loading information from events and purchase lists, simple but powerful is key. Interactions for Student Recruitment uses a custom object called Interactions (see what we did there?) as a staging table to directly write to Contact, Opportunity, Campaign Member, and Affiliation records. The package also includes easily-configurable field-to-field mapping from Interactions to these other objects via another custom object, Interaction Mappings. This means that Stella can connect whichever Salesforce-compatible integration or data loading tool she wishes to a single object, without having to edit or add complicated code or processes.

### User-friendly record creation and modification

While collecting these requirements, it is clear to Stella that admissions staff members want to focus on connecting with prospects and helping applicants, not entering data. But data is important! Interactions for Student Recruitment streamlines the data entry process by using customizable global and object-specific Actions. Object-specific Actions give the ability to create New Interactions from Leads, Contacts, Opportunities, and Campaigns, saving Stella's end-users clicks, keeping records in context, and ensuring entered data ends up in the right place. Some of the fields even come pre-filled, so the recruiters don't have to waste time re-typing information that is pre-existing on the various records.

### The ability to track points of contact and data sources

With all this awesomeness, Stella realizes that the marketing teams and admissions managers will also greatly benefit from Interactions for Student Recruitment. These users need a clear idea of what recruitment strategies are working, and where data is coming from, to continue to attract the best students to Connected University. By funneling all data loads and updates through the Interactions object, the university can track vital information such as Lead Source and Campaign Influence to give due credit to successful marketing efforts.

### A strong and industry-proven data model

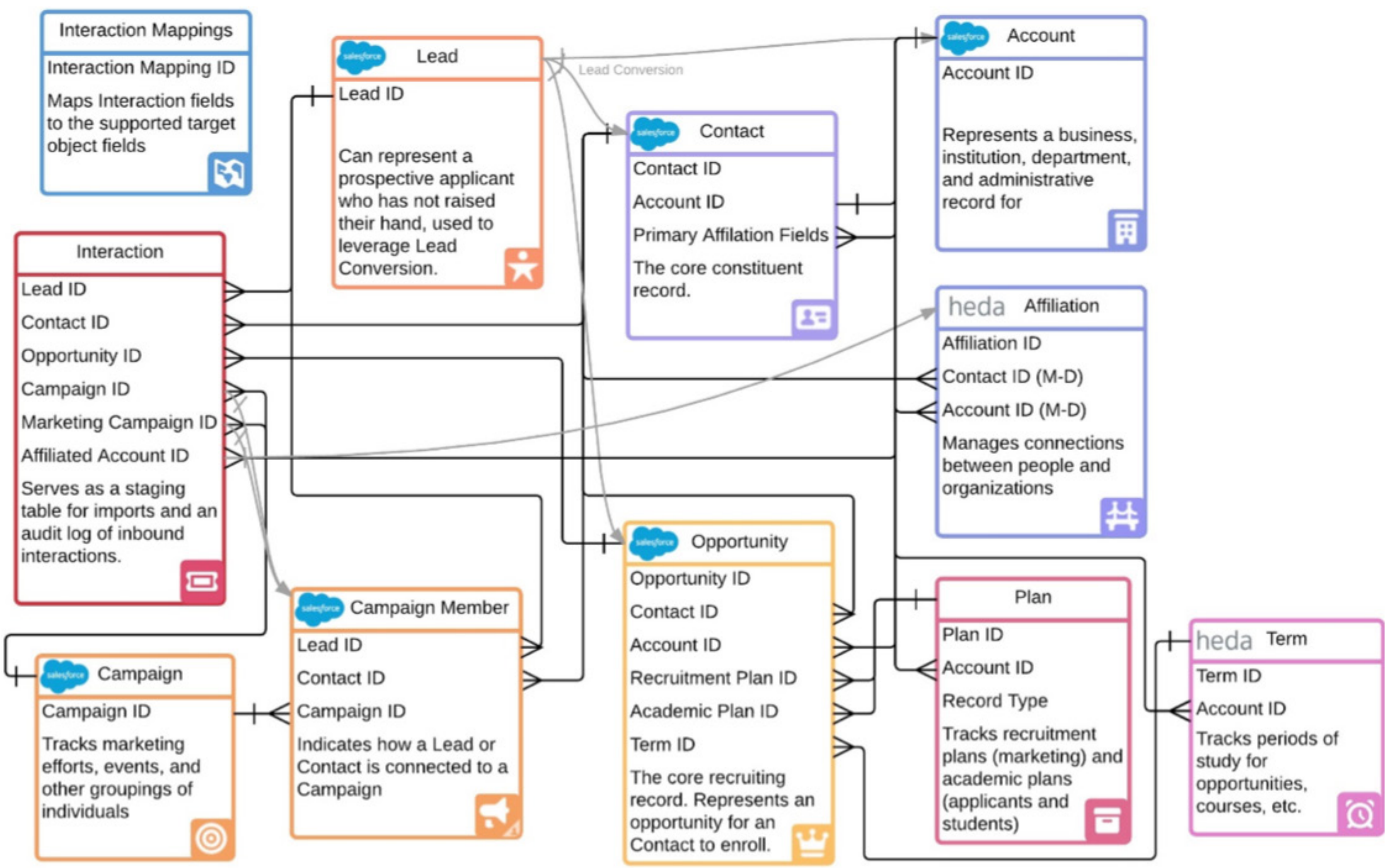
Stella is familiar with Salesforce but she is new to higher education's use of Salesforce. She does some research and finds out that Salesforce officially launched EDA (Education Data Architecture) in March 2016 to provide an object structure and functionality that supports higher education institutions and sets them up for success on the Salesforce platform. Institutions are able to build upon a foundation supported by Salesforce and the Higher Ed community. Interactions for Student Recruitment uses the core EDA functionality and expands on it to provide additional functionality within that same trusted framework. With these tools, Stella is excited to use Interactions for Student Recruitment and sees the potential for supporting the entire student life-cycle with EDA on Salesforce.

## Salesforce and EDA Standard Objects for Recruiting

We've talked a lot about how Interactions for Student Recruitment builds upon the core Salesforce and EDA objects and functionality to help universities make the best use of the technology Salesforce provides. This not only ensures universities are aligned with best practices in the higher education industry, it also keeps them at the forefront of technology used across industries.

We introduced you to most of the objects used in Interactions for Student Recruitment in the previous section. Before continuing, let's look at the Interactions for Student Recruitment data model, so you can see how all the objects, standard and custom, are connected.

The icon in the left corner of the object box (to the left of the object's name) marks if it is a standard Salesforce object or a EDA custom object. If there is no icon, it is an Interactions for Student Recruitment custom object. Gray arrows indicate a process that leads to the creation of a record, but there is no tangible, permanent link directly between the originating record and the created record.



Now, let's define some of the key standard Salesforce and EDA objects used, in recruitment terms:

| Object | Type | How it is used by Interactions for Student Recruitment |
|---|---|---|
| Leads | salesforce | Leads can represent suspect's names gathered from third-party vendors (purchased lists). Leads usually receive light marketing in order to entice potential prospects to request more information about the university. |
| Contacts | salesforce | Contacts represent individuals with a relationship to the university, such as a prospect, applicant, advisor, parent, etc. Prospects are those potential students who have, in some way, contacted the university such as by filling out a web form or coming in for a campus visit. |
| Accounts | salesforce | Accounts represent entities with a relationship to the university, such as a business or institution. EDA also uses Accounts to represent departments, households, and more, and each Contact has an Account through the 1-to-1 Administrative Account Model to ensure Opportunities and other key functionality can be leveraged by universities. More information can be found here. |
| Opportunities | salesforce | Opportunities are the central recruitment record, housing data such as academic and term interest for prospects (Contacts) as well as application data when prospects become applicants. Opportunity records represent the potential to recruit a prospect for a specific plan (also known as a program) and, hopefully, these records eventually represent applications. |
| Campaigns | salesforce | Campaigns can be used to track marketing efforts such as mass emails, advertising, direct mail, and much more. They can also be used to track events to quickly see, of the prospects invited, who attended, canceled, showed up unannounced, or did not show up at all. |
| Campaign Members | salesforce | Campaign Members connect Contacts and Leads to Campaigns to track individuals who are part of the marketing effort or were interested in or attended an event. |
| Affiliations | eda | Affiliations represent connections between a Contact and an Account. EDA uses Accounts to represent business organizations, educational institutions, departments, and more. |
| Terms | eda | Terms represent a period of study, or a period during which a set of courses are offered. These can vary between universities and within universities, so EDA allows Terms to be connected to Accounts for better organization and flexibility. Create Terms globally for your entire university or support departments with differing Terms by connecting their Term records to their department's Account. |

## Salesforce and EDA Leveraged Processes

The other important table to take a look at defines the uses of key native Salesforce and EDA processes that are leveraged by Interactions for Student Recruitment:

| Functionality | Type | How it's used by Interactions for Student Recruitment |
|---|---|---|
| Lead Conversation | salesforce | The conversion process allows a Lead to be converted into a Contact, Account, and Opportunity in one process. For recruiting, when a Lead reaches out in a way that results in an Interaction record (i.e. registering for an event), they are converted into a Contact with powerful related records. |
| Duplicate Management | salesforce | Duplicate and matching rules can be created for many standard and custom objects to prevent duplicate records from being created. |
| Campaign Influence | salesforce | Campaign Influence tracks the campaigns that have had an impact on Opportunities based on criteria determined by your university, such as the end date of the Campaign. |
| Primary Affiliation Fields | eda | EDA includes the ability to create additional Account record types and connect Account records to a Contact through a Primary Affiliation lookup. These are automatically updated when an Affiliation is marked as primary and can lead to the creation of an Affiliation when they are set. |

## How Interactions for Student Recruitment Works

This all sounds great, right? But you're probably still wondering, how does all this magic happen?

The main way Interactions for Student Recruitment accomplishes all these things is through custom code (an Apex Trigger, for those in the know) called the Interactions Processor and the Interactions custom object. When an Interaction is saved with a "New" status, the code is run. Leads and Contacts are searched through to prevent duplicates via Lead and Contact matching rules. Any existing records found are converted or merged with, as applicable, or a new Contact record is created if no existing records are found.

For brand-new records, related records are created if the appropriate data to create the record exists on the Interactions (i.e. academic and term interest, in the case of Opportunities). With existing records, the Processor is able to determine whether a new related record should be created or if an existing related record matches the information provided on the Interaction. Campaign Membership works in the same manner, existing Campaign Members are matched with an updated, if applicable, or new Campaign Members are created if none exist. This matching happens via custom "Key" fields, we'll get to how those are built a little later!

## Interactions and EDA Resources

Use the following resources for more information about EDA and Interactions for Student Recruitment.

- Higher Education Data Architecture (EDA) Data Sheet
- Get Started with EDA Unit | Salesforce Trailhead
- Install and Configure EDA
- Interactions Installation and Configuration Guide
- Interactions Technical Implementation Guide
- Interactions Sample Data

# Unit 1.3: Find Your Way Around Interactions

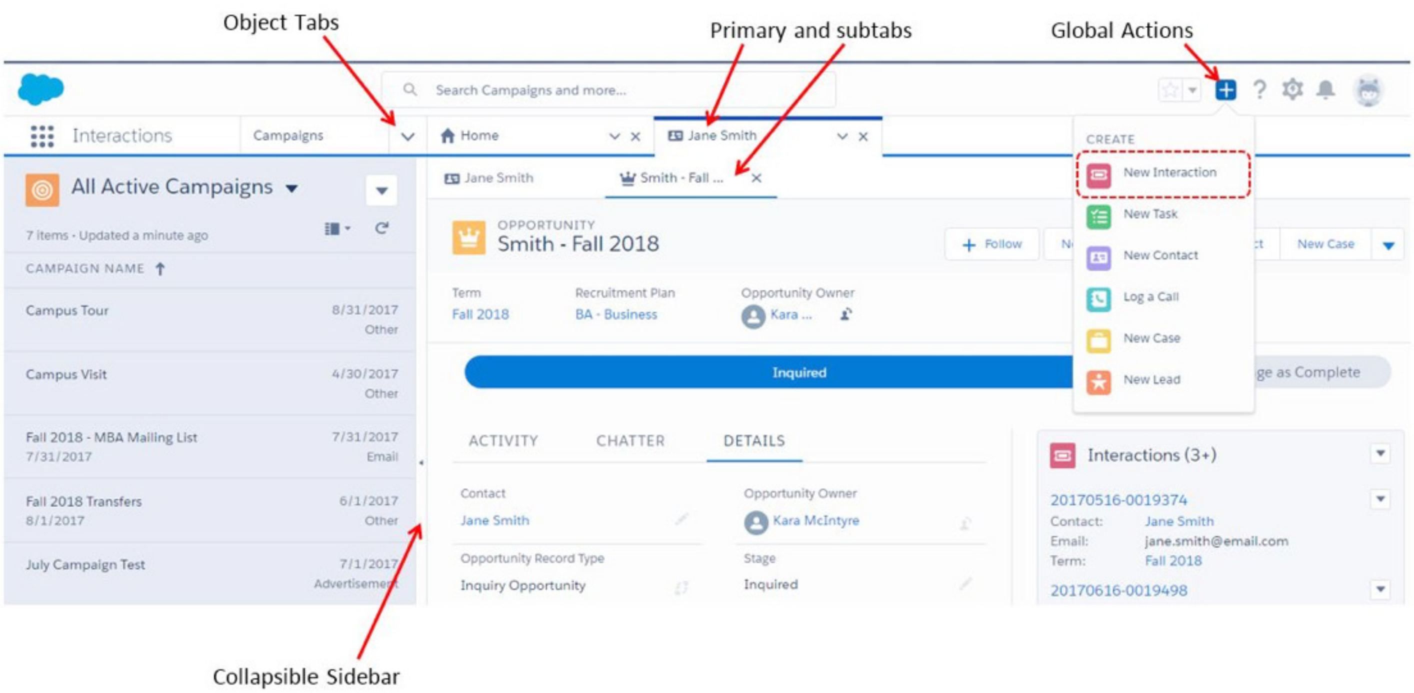
### Learning Objectives

- Find your way around Interactions for Student Recruitment
- Identify new fields on leads, contacts, opportunities, and campaign members
- Describe how to add Actions to your layouts

## Navigating Interactions for Student Recruitment

Remember Stella, Connected University's new Salesforce system administrator? Since we last saw her, she has successfully installed Interactions for Student Recruitment and is now learning how to navigate and use this new tool as well as how she can configure Interactions to meet all her end-user's needs.

First, let's look at navigation. The new Interactions App is a user-friendly Lightning Console App that keeps records in context of each other while also making other aspects of the UI available to users at lightning speed. Below are some tricks Stella learned to navigate the Interactions App. The object tab menu appears to the right of the App Launcher and App name. Click the dropdown arrow to select one of the objects included in the App.

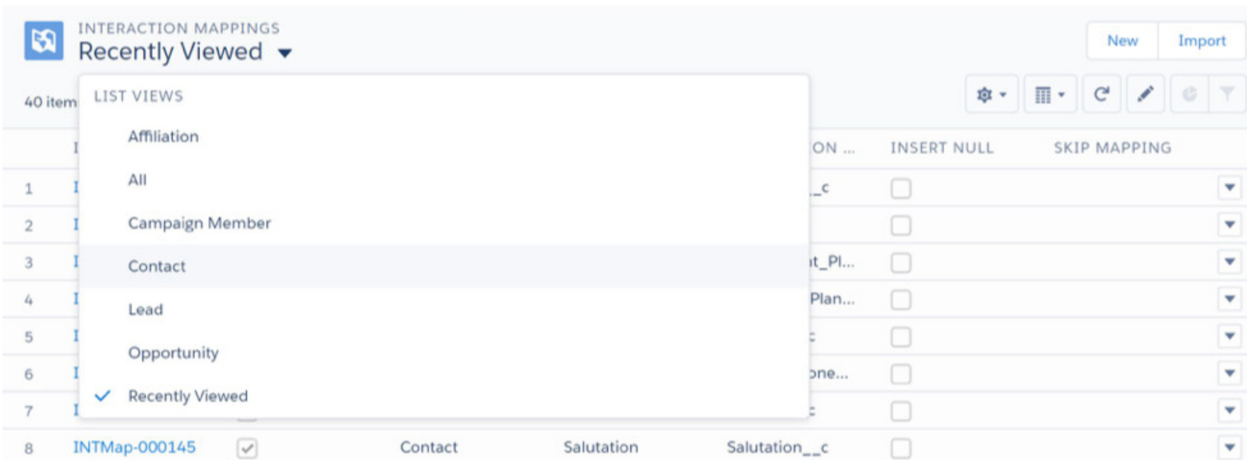



- Any newly opened records appear as primary tabs, listed horizontally to the right of the tab menu.
- Records opened from a primary tab appear in the subtabs area below the primary tab.
- When subtabs are open, primary tabs are also accessible on the subtab level, all the way to the left. This subtab matches the primary tab's icon and record name.
- The plus sign in the upper right next to the Favorites menu contains all the global actions the user has access to. Interactions for Student Recruitment includes a global action for quickly creating a new Interaction, which will appear here once it is added.

Check out the [Creating a Lightning Console App](Creating a Lightning Console App) Trailhead unit to learn how to customize this app.

## Included List Views

While exploring the Interactions App, Stella discovers that many of the tabs included in Interactions for Student Recruitment contain helpful list views for managing recruitment processes, such as these list views found in the Interaction Mappings tab. These list views will be especially helpful when Stella needs to edit or add new mappings between fields on Interactions and other objects in Salesforce.




Recommended list views are also provided for Opportunities and the custom object Plans (we'll talk about plans in the next section!).

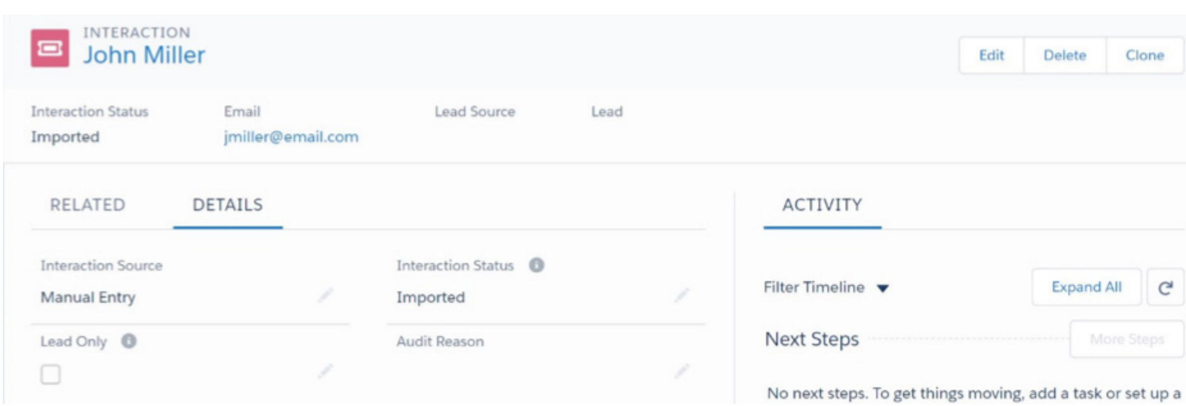
## New Objects and Important Fields

Interactions for Student Recruitment includes three new objects and a few new fields on standard objects to support any university's recruitment processes.

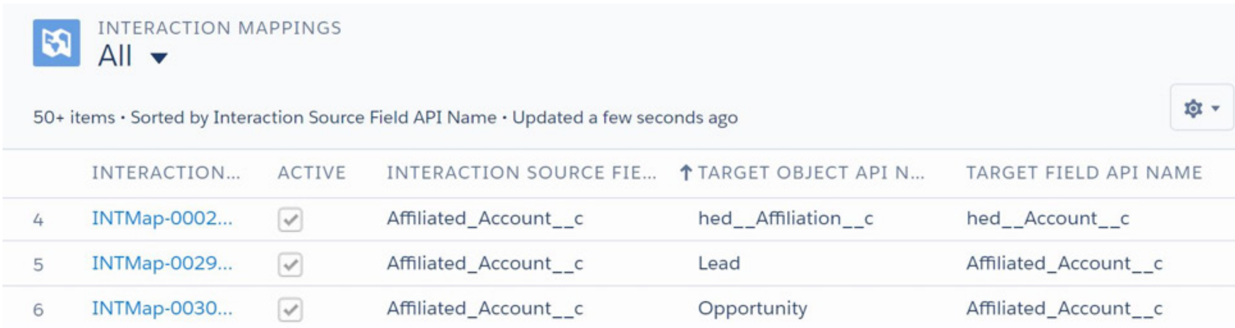
### New Objects

So far, we've covered how Salesforce and EDA's standard objects are used for recruitment purposes. Interactions for Student Recruitment also includes three new objects (two of which you should already be familiar with!): Interactions, Interaction Mappings, and Plans.

As you know, Interactions act as a staging table and audit log for inbound data. Whether Interaction records are loaded in batch or created individually, they are responsible for kicking off the processes that push data to other objects in Salesforce such as Leads, Contacts, Opportunities, Affiliations, and Campaign Members.



Interaction Mapping records determine where the values from each field on an Interaction go. A single Interaction field can be mapped to multiple target fields, such as these mappings from the Affiliated Account field on Interactions, which populate fields on Affiliations, Leads, and Opportunities, depending on which of those records are created or modified.

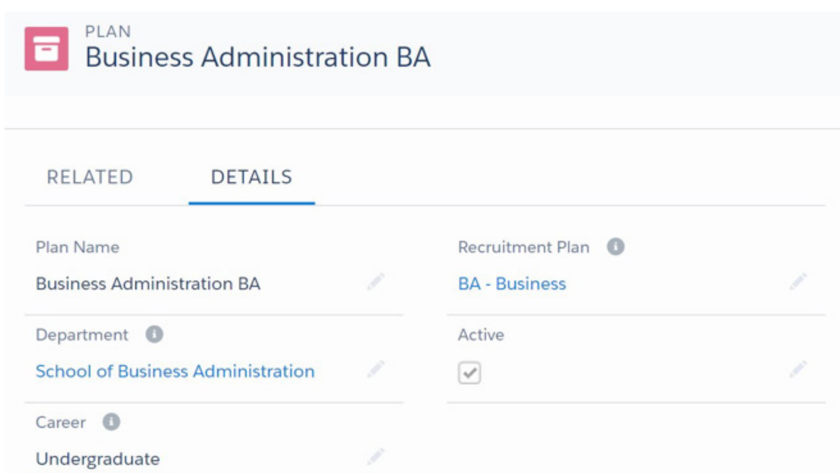

INTERACTION MAPPINGS
All

50+ items • Sorted by Interaction Source Field API Name • Updated a few seconds ago

| | INTERACTION... | ACTIVE | INTERACTION SOURCE FIE... | ↑ TARGET OBJECT API N... | TARGET FIELD API NAME |
|---|---|---|---|---|---|
| 4 | INTMap-0002... | ✓ | Affiliated_Account__c | hed__Affiliation__c | hed__Account__c |
| 5 | INTMap-0029... | ✓ | Affiliated_Account__c | Lead | Affiliated_Account__c |
| 6 | INTMap-0030... | ✓ | Affiliated_Account__c | Opportunity | Affiliated_Account__c |

The Plan object contains a Recruitment Plan record type and Academic Plan record type, each with their own page layout. Academic Plans represent the official degrees or programs of study a student applies to and is enrolled in. Often, these records are integrated with other resources, such as an online application, an online course catalog, or a student information system. Academic Plans can be grouped under Recruitment Plans, which are marketable values that may be used in Request for Information forms, event registrations, or to test interest in degrees or programs that are not currently offered.

Additionally, Plan records (whether it's the Academic or Recruitment type) also have an Account lookup field to connect to the departments, schools, or colleges at your university with related lists on those Account records. This gives the ability to view all the Academic or Recruitment Plans associated to a particular department, school, or college.

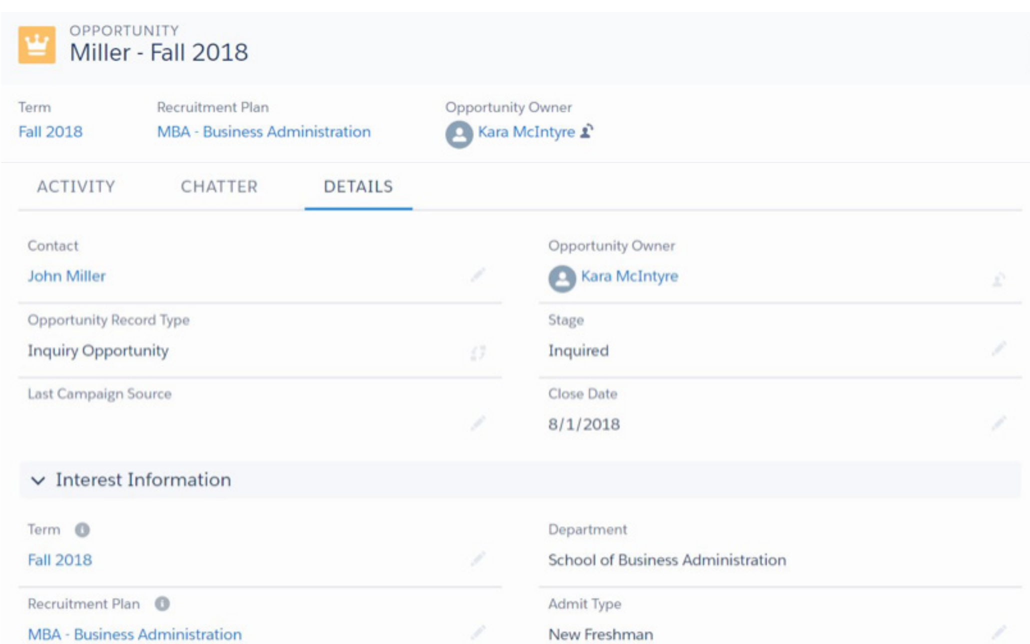


### Important Fields

Next, let's look at some of the fields that have been added to standard Salesforce and EDA objects:

| Object | Field | Description |
|---|---|---|
| Affiliation | Upsert Key | A unique external ID used by the Interaction process to upsert Affiliation records and prevent duplicates. (ContactID.AccountID) |
| Campaign | Campaign Key | An external ID for websites or integrations to reference this Campaign. If left blank when the Campaign is created or edited, a workflow rule sets it to the 18-digit Salesforce ID. |
| Campaign Member | Campaign Member Key | A unique external ID used by the Interaction process to upsert Campaign Members and prevent duplicates. (LeadID.CampaignID) |
| Contact | Constituent ID | A unique external ID to identify contacts using ID's from other databases, such as a student information system. |
| Opportunity | Contact | A lookup field to Contact. A trigger creates a Contact Role on the Opportunity based on this field for standard reporting and to track Campaign Influence. Used in building the Opportunity Key. |
| Opportunity | Recruitment Plan | The marketable degree or program the Contact is interested in. By default, it is used in the Opportunity Key unless an Academic Plan is provided on the Opportunity. |
| Opportunity | Academic Plan | The official degree or program the Contact has applied to. |
| Opportunity | Term | The academic period the Contact is interested in. By default, it is used in building the Opportunity Key. |
| Opportunity | Opportunity Key | An external ID used by the Interaction process to upsert Opportunities and prevent duplicates. (ContactID.Undergrad.TermID) or (ContactID.Graduate.RecruitmentPlanID.TermID) |

Here is an example Opportunity record with some of the new fields populated:



See the Interactions Data Dictionary for a full list of objects, fields, and other metadata included in Interactions for Student Recruitment.

## Adding Lightning Actions

Now that Stella has familiarized herself with navigating and identifying new objects and fields in Interactions for Student Recruitment, she turns her attention to the custom Quick Actions included in the package. Because Interaction records allow users to create and update multiple records at once while leveraging duplicate matching rules, Stella wants to encourage her users to create new Contacts, Affiliations, Opportunities, and Campaign Members by creating Interaction records. The most effective way to do this is to remove the standard Convert, Create, and Edit buttons from these objects.

Stella knows that these object-specific Quick Actions can help by also providing the following benefits:

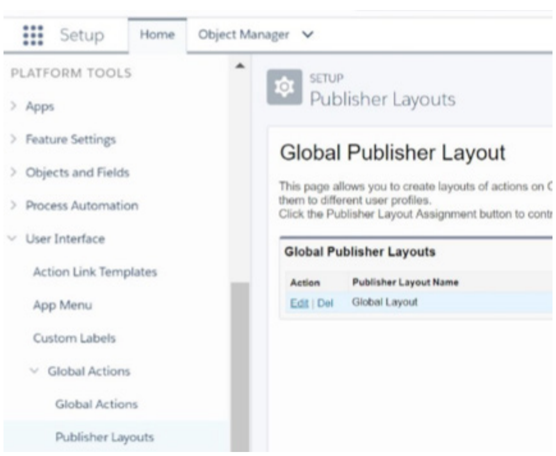
- Adding Actions directly to the record layouts users are looking at means fewer clicks
- Object-specific actions can be prefilled with information from the record they appear on
- Prefilled fields can be included on the Action layout or hidden, depending on whether the user will need to edit them for specific use cases
- Actions include only the fields users need to see and populate based on the use case

Note: Picklist fields cannot be prefilled using a formula, so picklist fields on Actions will often be blank, even if the matching field on the record has a value.

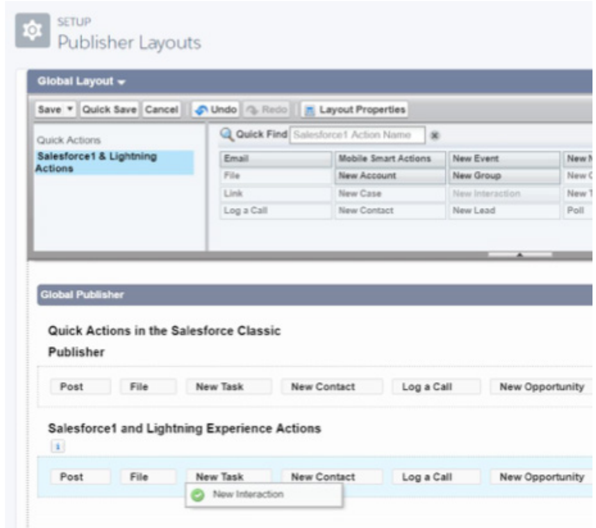
Stella followed the steps below to add the Actions provided in Interactions for Student Recruitment to the Global Actions menu, and the Lead, Contact, Opportunity, and Campaign layouts.

### Add the New Interaction action to Global Actions

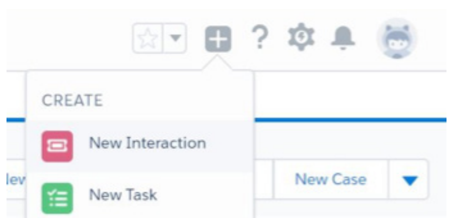
1. Log into the org where Interactions for Student Recruitment is installed.
2. Go to Setup > User Interface > Global Actions > Publisher Layouts.
3. Click Edit next to the Global Layout.




4. Select Salesforce1 & Lightning Actions and drag the New Interaction action to the Salesforce1 and Lightning Experience Actions section.

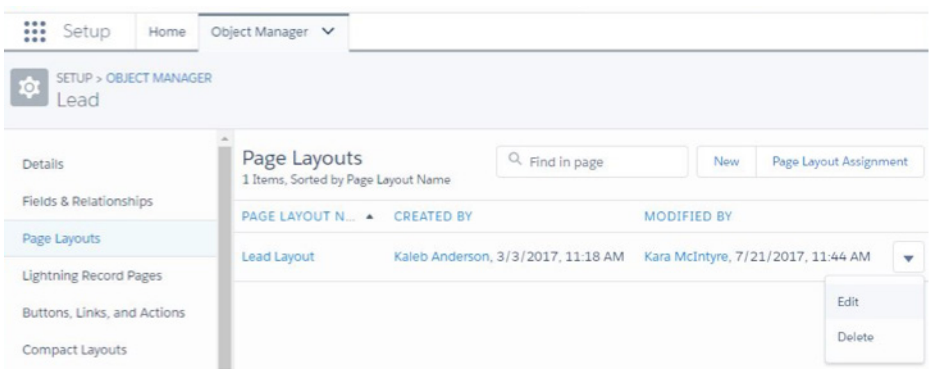



5. Save.
6. The Action can now be access from Global Actions menu found on most Lightning pages.

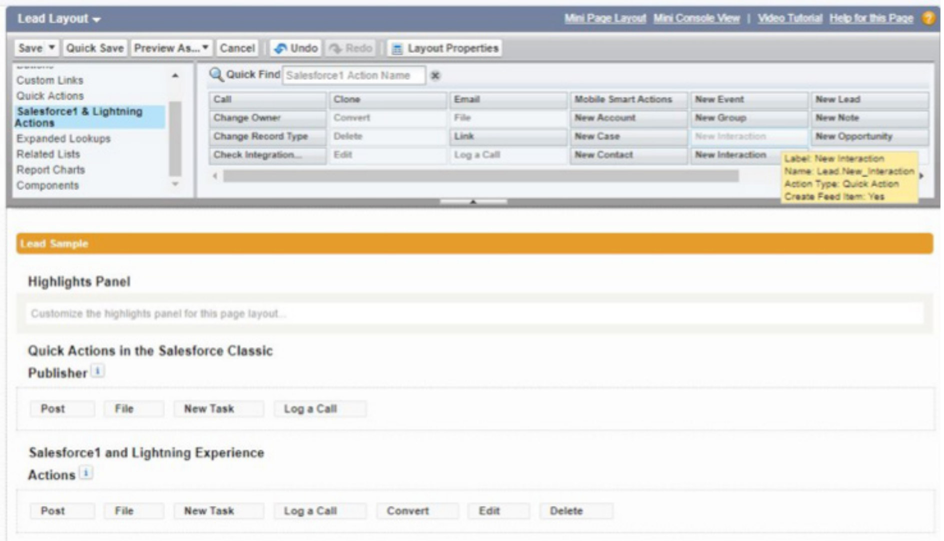



## Add the New Interaction object-specific actions to the Lead layout and other object layouts

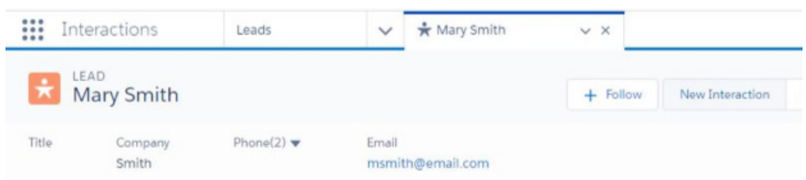
1. Go to Setup > Object Manager > Lead > Page Layouts.
2. Select Edit using the dropdown menu next to the Lead Layout.




3. Select Salesforce1 & Lightning Actions and drag the New Interaction action to the Salesforce1 and Lightning Experience Actions section.




4. Save.
5. The Action can now be access from Global Actions menu found on most Lightning pages.




6. Repeat steps 1 through 6 for the Contact, Opportunity, and Campaign Page Layouts.

Now that Stella has installed Interactions for Student Recruitment, learned to navigate it, and added quick actions for easy record creation, she is ready to let the recruiters at Connected University start recruiting with Interactions for Student Recruitment. Join Stella in the next unit as she receives her first enhancement requests and learns more about the additional functionality Interactions provides.

## Resources

Use the following resources for more information about Interactions for Student Recruitment.

- Interactions User Guide
- Interactions Installation and Configuration Guide
- Interactions Technical Implementation Guide
- Interactions Data Dictionary

# Unit 1.4: Learn About and Create Interactions

### Learning Objectives

- Understand how one university wants to expand Interactions
- Describe the advanced features of Interaction Mappings
- Create Interaction Mappings and understand how they are leveraged

## Taking Interactions to the Next Level

Stella, CU's awesome Salesforce system admin, has learned about Interactions for Student Recruitment can do to revamp CU's recruiting, she successfully implemented Interactions for Student Recruitment, and she on-boarded recruiters from a variety of schools and colleges. So far, the recruiters love that they can add a Contact with an Administrative Account, Affiliation, Opportunity, and Campaign Membership by creating a single Interaction record all while not having to worry about creating duplicates. The recruiters are also impressed with the Quick Actions, which have made their experience more efficient and streamlined so they can focus on building relationships with their recruits.

Now that the recruiters have been using Interactions for Student Recruitment, they want to add some customizations. The Undergraduate Admissions team is organizing a big event for Undergraduate transfers to encourage prospects to apply to Connected University, and they need to collect the t-shirt sizes of everyone who registers so they know how many shirts to make for the event. They ask Stella if that information can be collected on event registration Interactions and added to the Campaign Members created for the event.

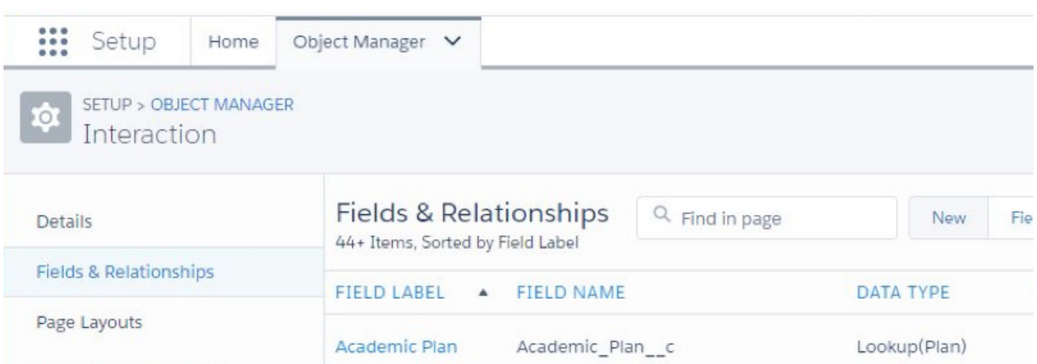
Stella has gotten her first enhancement request! And she knows just how to handle it, she can deliver this enhancement with a few easy steps using Interaction Mappings.

## Using Interaction Mappings to Meet Enhancement Requests

Armed with the admissions team's requirements and use case, Stella is ready to customize Interactions for Student Recruitment. First, she will need to add a T-Shirt Size field to both Interactions and Campaign Members. Then, she will create an Interaction Mapping record to copy the value from an Interaction to a Campaign Member. Read through the steps below to learn how Stella did all this:

### Add new fields and create Interaction Mapping record

1. Go to Setup > Object Manager > Interaction > Fields & Relationships.
2. Click the New button in the upper right.

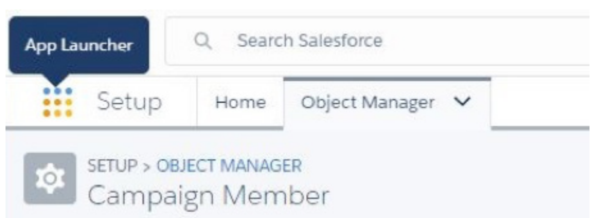


3. Create a field with a type of Picklist, the name “T-Shirt Size”, the API Name “T_Shirt_Size”, and the following values:
    a. S
    b. M
    c. L
    d. XL

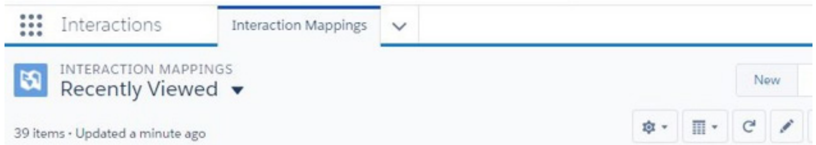

4. Set the field-level security as Visible to System Administrator, add the field to the Interaction Layout, and click Save.

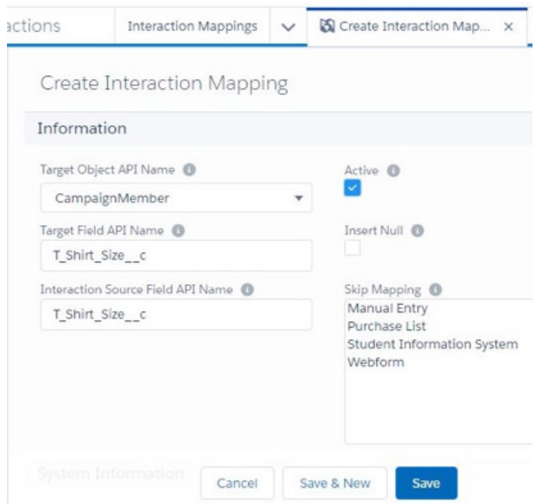
5. Go to Object Manager > Campaign Member > Fields & Relationships
6. Click the New button in the upper right.
7. Create a field with a type of Picklist, the name “T-Shirt Size”, the API Name “T_Shirt_Size”, and the following values:
    a. S
    b. M
    c. L
    d. XL
8. Set the field-level security as Visible to System Administrator, add the field to the Interaction Layout, and click Save.

9. Go to App Launcher > Interactions, and select the Interaction Mappings tab from the tab menu.



10. Click the New button in the upper right corner to create a new Interaction Mapping record with the following values:
    a. Target Object API Name = CampaignMember
    b. Active = checked
    c. Target Field API Name = T_Shirt_Size__c
    d. Interaction Source Field API Name = T_Shirt_Size__c

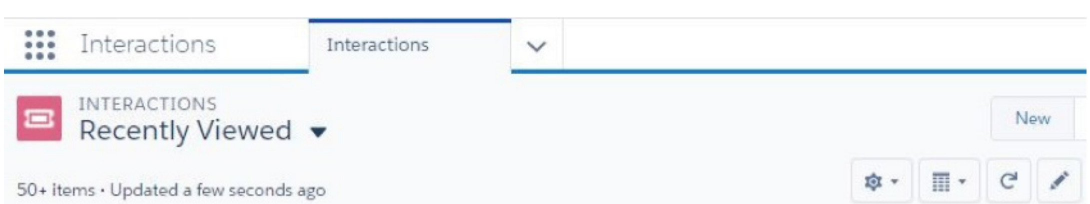


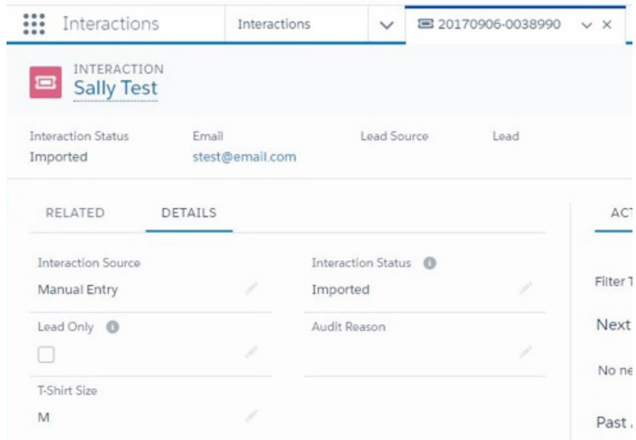

As confident as Stella is with her system admin skills, she knows the importance of testing a new configuration. Follow her steps below to see how she validated that her new mapping worked before giving users access to the new fields:

## Test the new configuration and give access

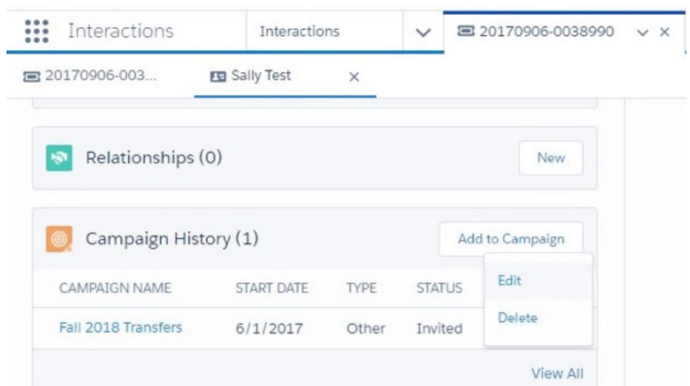
1. Select the New Interaction Action from the Global Action Layout and create an Interaction record with the following values:
    a. T-Shirt Size = M
    b. First Name = Sally
    c. Last Name = Test
    d. Email = STest@email.com
    e. Campaign = Fall 2018 Transfers
    f. Campaign Member Status = Invited



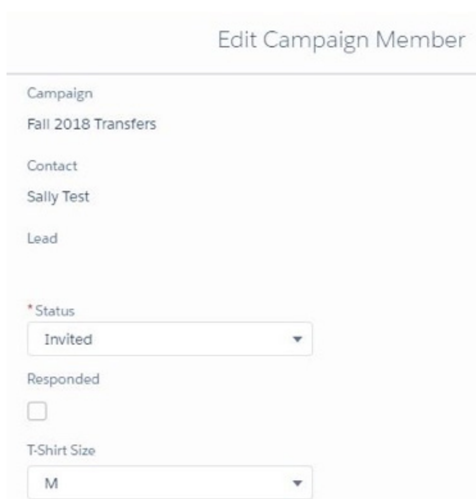
2. The Interaction should look like this after it is saved:




3. Click on the name of the Contact at the top of the Interaction to open the Contact record.
4. Select the Related tab on the Contact, scroll down to Campaign History, and select Edit from the dropdown menu next to the Fall 2018 Transfers Campaign Member entry.




5. You will not edit anything on the Campaign Member record. Opening the record in edit mode this way allows you to easily view the fields that were set from the Interaction. The record should look like this:



6. Go to Setup > Object Manager > Interaction > Fields & Relationships > T-Shirt Size.
7. Click the Set Field-Level Security button.
8. Grant access to the appropriate profiles.
9. Repeat steps 6-8 for Setup > Object Manager > Campaign Member > Fields & Relationships > T-Shirt Size

The event was a huge success, and the recruitment office saved money by more accurately estimating which t-shirts would be needed for that event. The admissions team decides this data would also be valuable on Contact records to coordinate other T-shirt giveaways like surprising new admits with official CU shirts. Stella's steps to meet this new enhancement are below:

### Map an existing Interaction field to a new object field and test

1. Go to Setup > Object Manager > Contact > Fields & Relationships and create a new field with the following values:
    a. Field Type = Picklist
    b. Field Name = T-Shirt Size
    c. API Name = T_Shirt_Size
    d. Enter values =
        i. S
        ii. M
        iii. L
        iv. XL
    e. Set Field Security to Visible for System Administrator
    f. Add field to Contact Layout
2. Go to App Launcher > Interactions, select the Interaction Mappings tab from the tab menu, and create a new Interaction Mapping record with the following values:
    a. Target Object API Name = Contact
    b. Active = checked
    c. Target Field API Name = T_Shirt_Size__c
    d. Interaction Source Field API Name = T_Shirt_Size__c
3. Select the Interactions tab from the tab menu, and open the Interaction record you created when you tested the Campaign Member mapping earlier.
4. Double-click the Interaction Status field, change the value to "New" and Save.
5. Click on the name of the Contact at the top of the Interaction record to open the Contact.
6. Click on the Details tab on the Contact record and confirm the T-Shirt Size field appears and is now set to "M".
7. Go to Setup > Object Manager > Contact > Fields & Relationships > T-Shirt Size.
8. Click the Set Field-Level Security button.
9. Grant access to the appropriate profiles.

After completing these two enhancement requests with ease, Stella continues to be impressed by Interactions for Student Recruitment's easy maintenance and customization features.

## Additional Features of Interaction Mappings

A new request has come across Stella's desk; the Undergraduate Admissions team now wants to load and track a special prospect list that was gathered from an event, before Salesforce and Interactions were implemented, so they can communicate with them from Salesforce. After a month of marketing communication, the team would like to be able to quickly tell which of those prospects reached out in response by filling out a web form to request information, registering for an event, or using some other method of contact that results in an Interaction. Any Interaction coming from a purchase list load or the Student Information System (SIS) should not count as "reaching out".

Stella thinks that this can be done with reports, but the team would like to see these Contacts in a simple list view, so Stella has decided to create a checkbox on Contact called New Prospect. She will load the list of prospects with this checkbox checked for all of them to designate them as new. The New Prospect checkbox should reset to unchecked when Interactions are created from some data sources (i.e. web form) but not others (i.e. purchase list). Stella will need to use two additional settings found on Interaction Mapping records:

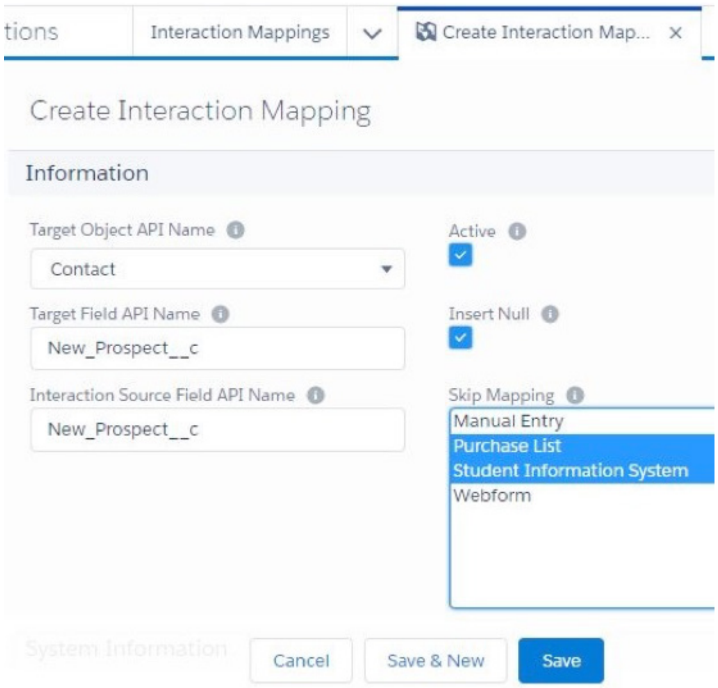
| | |
|---|---|
| Insert Null checkbox | Allows a null (or blank) value to overwrite a populated field. This is how the New Prospect checkbox will go from checked to unchecked. |
| Skip Mapping multi-select picklist | Interaction records with an Interaction Source selected in this picklist will ignore the mapping record for that particular field and the existing or blank value on the target object will be preserved. This is how the New Prospect checkbox will only go from checked to unchecked for certain sources. |

Armed with this new knowledge, Stella is ready to add the New Prospect checkbox on Contact and create an Interaction Mapping record to set the checkbox to blank for Web form or Manual Entry Interactions but do nothing for Purchase List and Student Information System Interactions. Follow her steps below:

### Create new checkbox fields and Interaction Mapping

1. Go to Setup > Object Manager > Interaction > Fields & Relationships and create a new field with the following information:
    a. Field type = checkbox
    b. Field Label = New Prospect
    c. Default Value = unchecked
    d. Field Name = New_Prospect
    e. Set field-level security set to Visible for System Administrator
    f. Add the field to the Interaction layout and save
2. Go to Setup > Object Manager > Contact > Fields & Relationships and create a new field with the following information:
    a. Field type = checkbox
    b. Field Label = New Prospect
    c. Default Value = unchecked
    d. Field Name = New_Prospect
    e. Lead field-level security set to Visible for System Administrator
    f. Add the field to any Contact layouts and save

3. Go to App Launcher > Interactions, select the Interaction Mappings tab from the tab menu and create a new Interaction Mapping record with the following values:
    a. Target Object API Name = Contact
    b. Active = checked
    c. Target Field API Name = New_Prospect__c
    d. Insert Null = checked
    e. Interaction Source Field API Name = New_Prospect__c
    f. Skip Mapping = Purchase List; Student Information System




Note: To select multiple values on a multi-select picklist in Lightning, hold Shift and click (Windows) or hold Command and click (Mac).

Stella is now ready to test her new Interaction Mapping configuration. Follow her steps below:

## Test Insert Null and Skip Mapping Functionality

1. Use the New Interaction Global Action to create and Interaction record with the following data filled out:
    a. New Prospect = checked
    b. First Name = Paul
    c. Last Name = Prospect
    d. Email = pprospect@email.com
2. After you save, click the linked name of the Contact at the top of the record to open it, and confirm the New Prospect checkbox is checked on the Details tab of the Contact.
3. Go to the Related tab, scroll down to the Interactions related list and open the Interaction you just created.

4. Click the Clone button in the upper right and change these fields:
   a. Interaction Source = Purchase List
   b. New Prospect = unchecked
5. After you save the record, click the linked name of the Contact to open it. The New Prospect checkbox should still be checked, because Purchase List Interactions should be skipped for that mapping.
6. Go to the Related tab, scroll down to the Interactions related list and open the most recent Interaction you created.
7. Click the Clone button in the upper right and change these fields:
   a. Interaction Source = Web form
   b. New Prospect = unchecked (it should already be unchecked if you chose the right Interaction record)
8. After you save the record, click the linked name of the Contact to open it. The New Prospect checkbox should no longer be checked.
9. Go to Setup > Object Manager > Contact > Fields & Relationships > New Prospect.
10. Click the Set Field-Level Security button.
11. Grant access to the appropriate profiles.
12. Repeat steps 9-11 for Setup > Object Manager > Interaction > Fields & Relationships > New Prospect.

Now that the functionality has been setup and tested, Stella can import the list of prospects with "New Prospect" set to checked. This checkbox will remain unchecked on all Interactions created, but only the Interactions with the desired Interaction Source will overwrite it set it to unchecked. The admissions team can now periodically look at the list view they created to see which records are still marked as new prospects.

## Resources

Use the following resources for more information about Interactions for Student Recruitment.

- Interactions User Guide
- Interactions Installation and Configuration Guide
- Interactions Technical Implementation Guide

# Chapter 2 – Boost Opportunities with Interactions

## Unit 2.1: Get Started with Opportunities for Recruitment

### Learning Objectives

After completing this unit, you'll be able to:

- Describe the use of Opportunities for recruitment
- Name and describe the different recruitment models
- Customize the recruitment steps on Opportunities and Interactions
- Describe the different Opportunity Record Types and their uses

## Connect with Prospects and Applicants

Stella, Connected University's system admin you met in the previous chapter, knows that an essential part of recruiting is connecting with prospects, understanding where they are coming from and what they are interested in, and giving them the information they need when they need it. That requires not only a solid communication plan, but plenty of good data.

CU has started down the path of collecting and storing more data, and structuring that data so it can be used to communicate effectively, understand their prospects, and make their processes more efficient. They are using Interactions for Student Recruitment to track the way data is coming in and automate where that data ends up in Salesforce and the recruiters are loving it.

However, Interactions do more than stage data so it can be sent to other areas of Salesforce. It also provides a starting point for universities like CU who know what Salesforce is capable of and want to expand their recruitment practices, but don't know where to start. Stella wants to find out more about how Opportunities are used in Interactions for Student Recruitment so she can continue to help the recruiters at CU make meaningful relationships with their prospects and applicants.

### The recruiters are looking for the ability to:

- Generate more prospects and differentiate those who have a higher level of interest from those who have yet to raise their hand
- Track a prospect's interest in a plan and term
- Move prospects through a standard process with well-defined goals
- Create multiple standard recruitment processes for different types of students or departments
- Help manage their communications while still providing personable service
- Collect more and better data to help their marketing teams understand which strategies are working to bring in the best students

To do this, Stella is looking at these main functions offered through the Sales Cloud:

| | |
|---|---|
| Leads | Individuals who may be interested but have not raised their hands |
| Contacts | Individuals who have raised their hands, or have another type of relationship with the university, like a parent or high school counselor |
| Opportunities | The prospect's interest in a plan and term, from point of inquiry to student |
| Sales Processes | A set of stages an Opportunity is moved through to achieve a goal for that recruitment process |

| | |
|---|---|
| Email Templates | Emails that are shareable across departments and contain merge fields to help manage one-to-one communication |
| Lead Source | A set of values to track how data enters the system at the point of Lead, Contact, and Opportunity creation |
| Campaigns | A marketing or recruitment strategy such as an email blast, campus visit, or college fair, that tracks the Leads and Contacts reached and the Opportunities influenced |

Use these Trailhead resources to learn more about the Sales Cloud:

- Sales Cloud Platform: Quick Look
- Accounts & Contacts
- Leads & Opportunities

## Designing Opportunities for Recruitment

Connected University will be using Opportunities to track a prospect's unique interest in the University, but what does that mean? That depends on the admissions department! Let's talk about some common recruitment processes applied by CU.

When it comes to undergraduate prospects, their interest is in the undergraduate-level majors starting in a defined term. An undergraduate student who wants to start school next September may have their educational career mapped out, but they don't need to. They may inquire about various majors such as business, psychology, and English, but they ultimately submit a general application to the Undergraduate Admissions department for a certain term. This is called centralized recruiting because an applicant need not apply for each major of interest.

Admission to graduate programs at CU function a little differently. Prospects that are interested in a specific graduate-level program starting in a defined term must submit an application for the specific degree they wish to pursue. A graduate prospect who wants to start school next September may be interested in an MBA as well as an English MA degree. The recruitment and admissions processes for these programs are managed by different teams and departments in different schools, so the prospect's interest must be tracked separately. When it comes time to apply, the prospect will apply for each program of interest, because graduate admissions follows a decentralized recruitment model.

So, what makes an Opportunity unique in each model?

| Career | Model Used | Opportunity Key Concatenation |
|---|---|---|
| Undergraduate | Centralized Model | Prospect + Level + Term |
| Graduate | Decentralized Model | Prospect + Level + Plan + Term |

If an undergraduate's major of interest changes for the same Term, their undergraduate Opportunity will be updated to reflect that change; but if a graduate's program of interest changes for the same Term, a new graduate-level Opportunity will be created.

Stella now understands what makes an Opportunity unique, but what steps does it follow? Let's look at how she has defined the general Opportunity lifecycle from inquiry to applicant to enrollment.

### Opportunity Lifecycle

Inquiry Opportunity

Applicant Opportunity


If we translate the diagram directly to Salesforce, the Inquiry Opportunity section becomes three Stages in an Inquiry Sales Process, with the end goal of "Start Application," and the Applicant Opportunity section becomes five Stages in an Applicant Sales Process, with the end goal of "Enroll."

Undergraduate and graduate admissions processes probably include different steps, so they may want their own Sales Processes and Stages. That can be done as well, but for now we're going to focus this standard model.

## Opportunity Record Types

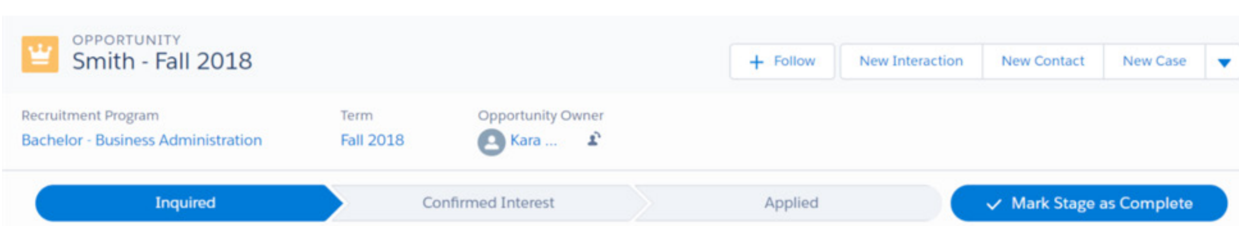
When you look at the Opportunity Lifecycle diagram above, you may wonder why it is separated into two paths: inquiry and applicant. There are several benefits to this:

1. Defining clear, easy-to-manage goals
2. Reporting on and automating customized processes
3. Defining different required fields
4. Using different page layouts for the fields available
5. Listing different picklist values in fields used for both inquiries and applicants
6. Security to prevent Stage changes or field editing for certain types of Opportunities

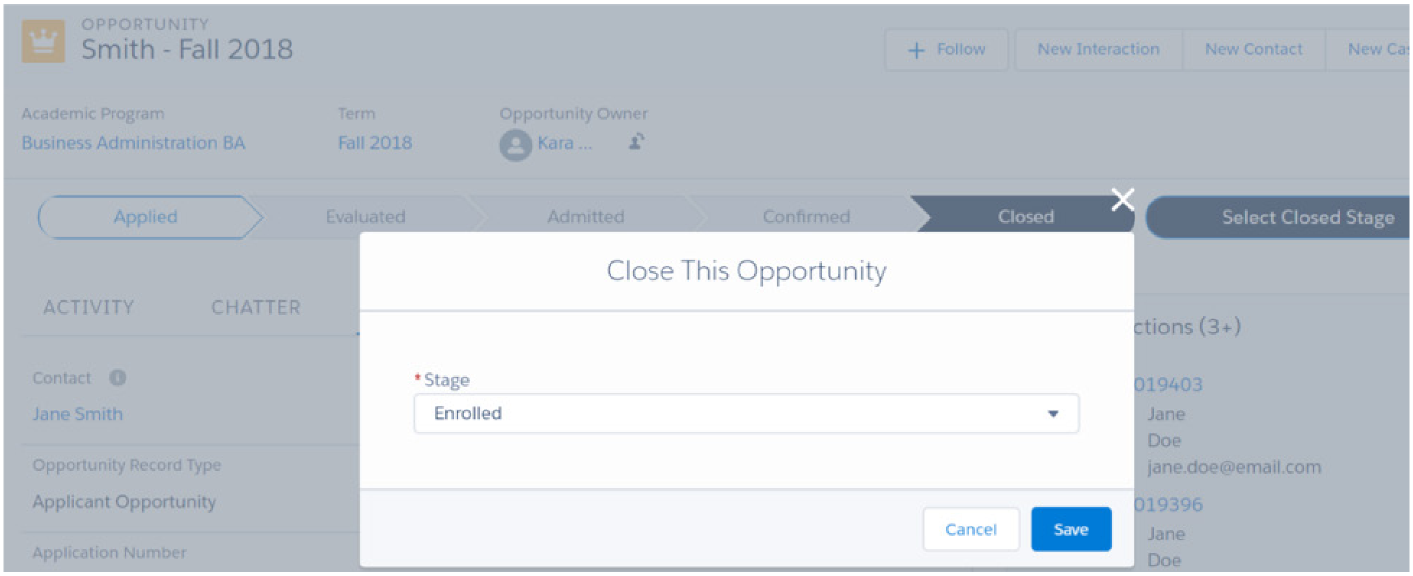
Interactions for Student Recruitment includes Opportunity Page Layouts tailored to Inquiry-level Opportunities and Applicant-level Opportunities. Stella followed the steps in Interactions for Student Recruitment's installation guide and has created two Opportunity Sales Processes and Record Types to take advantage of the Page Layouts included in the package and meet the needs of the recruiters.

### Inquiry Opportunity

The Inquiry Opportunity's compact layout displays the Recruitment Plan, and the Stages range from Inquired to Applied.



Applicant Opportunity



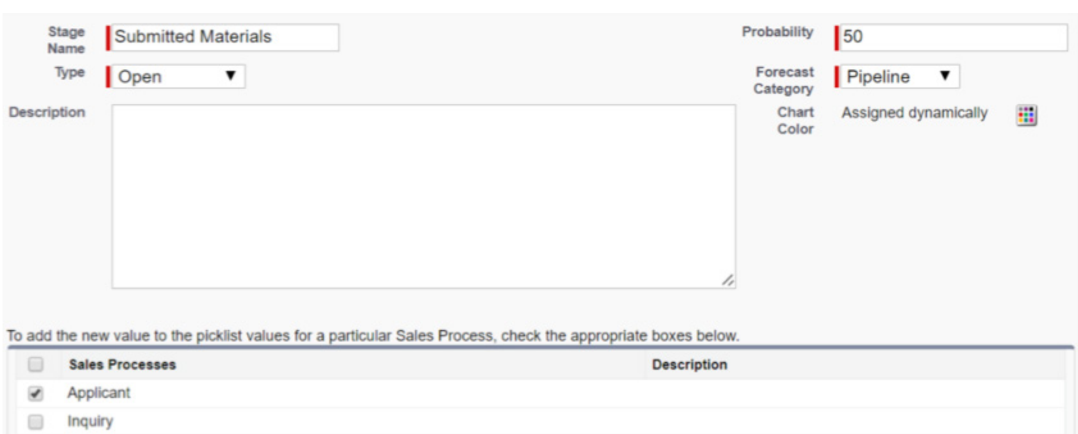

The Applicant Opportunity's compact layout displays the Academic Plan, and the Stages range from Applied to Enrolled.

These stages, sales processes, and page layouts have helped CU jump into using Opportunities, but they can all be further customized to fit specific needs.

## Customize Stage on Opportunities and Interactions

Stella receives a request from the recruiters to add a new Applicant-level Stage to Opportunities. Follow along with her as she adds the new Stage:

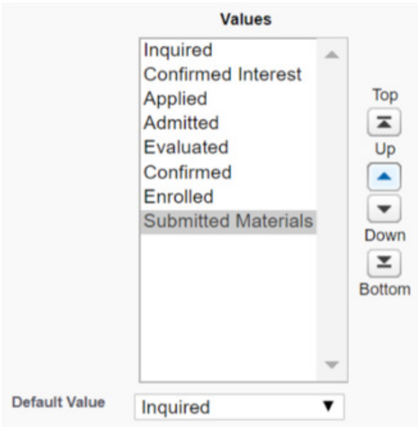
1. Go to Setup > Object Manager > Opportunity > Fields & Relationships and click on the Stage field.
2. Scroll down to Opportunity Stages Picklist Values and select "New"
3. Add your new Stage Name and Type. Probability is a static percentage that can be used in reporting. Forecast Category is also used for reporting. Select which Sales Processes the Stage should be added to, and save.




4. Reorder the Stages if needed by selecting "Reorder" and moving the values around.

Next, she much update the Stage values on the Interactions object, so the value she added can be used:

1. Go to Setup > Object Manager > Interaction > Field & Relationships and click on the Opportunity Stage field.
2. Scroll down to Picklist Values and select "New"
3. Add your new Stage and save.
4. Reorder the Stage values by selecting "Reorder." Highlight one or more values and move them using the Up and Down buttons on the right, then save.




Now that Stella understands why Opportunities can be used for recruitment, what an Opportunity represents, how to design them, and how to customize them, she wants to take a closer look at Interactions' native Opportunity matching to learn how she can customize the matching process. Join her in the next unit to learn more about Opportunity matching and the different recruitment models.

## Resources

- Interactions User Guide
- Lightning Experience for Sales Trailhead Module

## Unit 2.2: Create Opportunities with Interactions

### Learning Objectives

After completing this unit, you'll be able to:

- Explain the difference between a centralized and decentralized recruitment model and when each would be used
- Create Interactions to update Opportunities using a centralized and decentralized recruitment model

## Centralized vs. Decentralized Recruitment Models

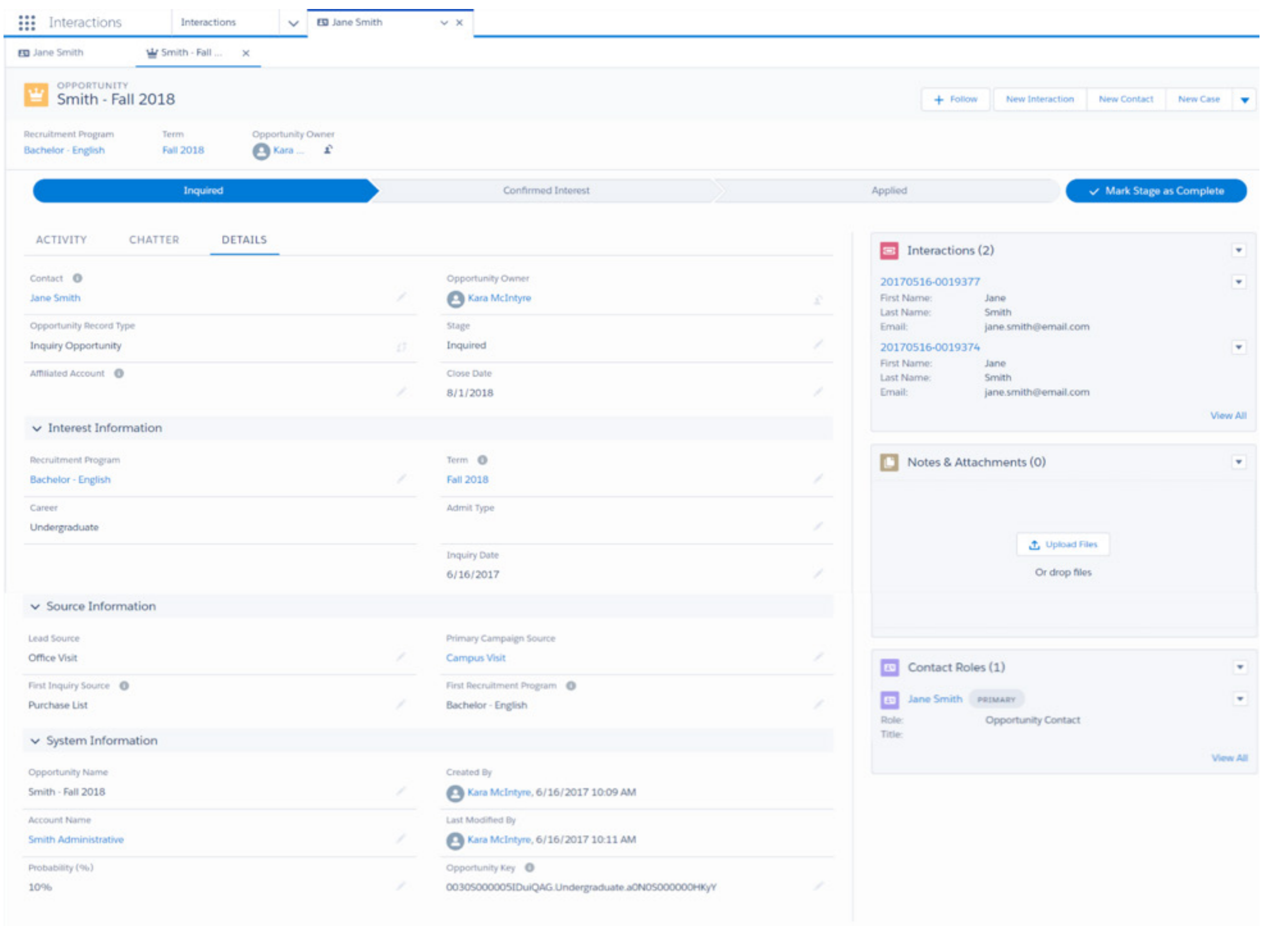
The undergraduate and graduate admissions teams at CU recruit in different ways. They not only employ distinct strategies, their recruitment teams often operate differently too.

As you have seen, undergraduate recruitment at CU manages applicants in one place regardless of their major of interest, which is considered a centralized model. Graduate recruitment at CU uses a decentralized model, and manages applicants based on their major of interest. This is reflected in the way a university defines a unique undergraduate Opportunity (Prospect, Level, and Term) versus a unique graduate Opportunity (Prospect, Level, Plan, and Term).

One of the biggest concerns when bringing information into a system is data cleanliness, and that means avoiding duplicate records as much as possible. Interactions avoid creating duplicate Opportunities by taking the parameters that make a record unique and turning them into a unique ID.

## CU's Undergraduate Use Case (centralized)

Jane Smith, a current high school student, inquires about the Bachelor – English plan. She wants to start Fall 2018. Let's look at an example of what her Inquiry Opportunity record would look like in Salesforce:

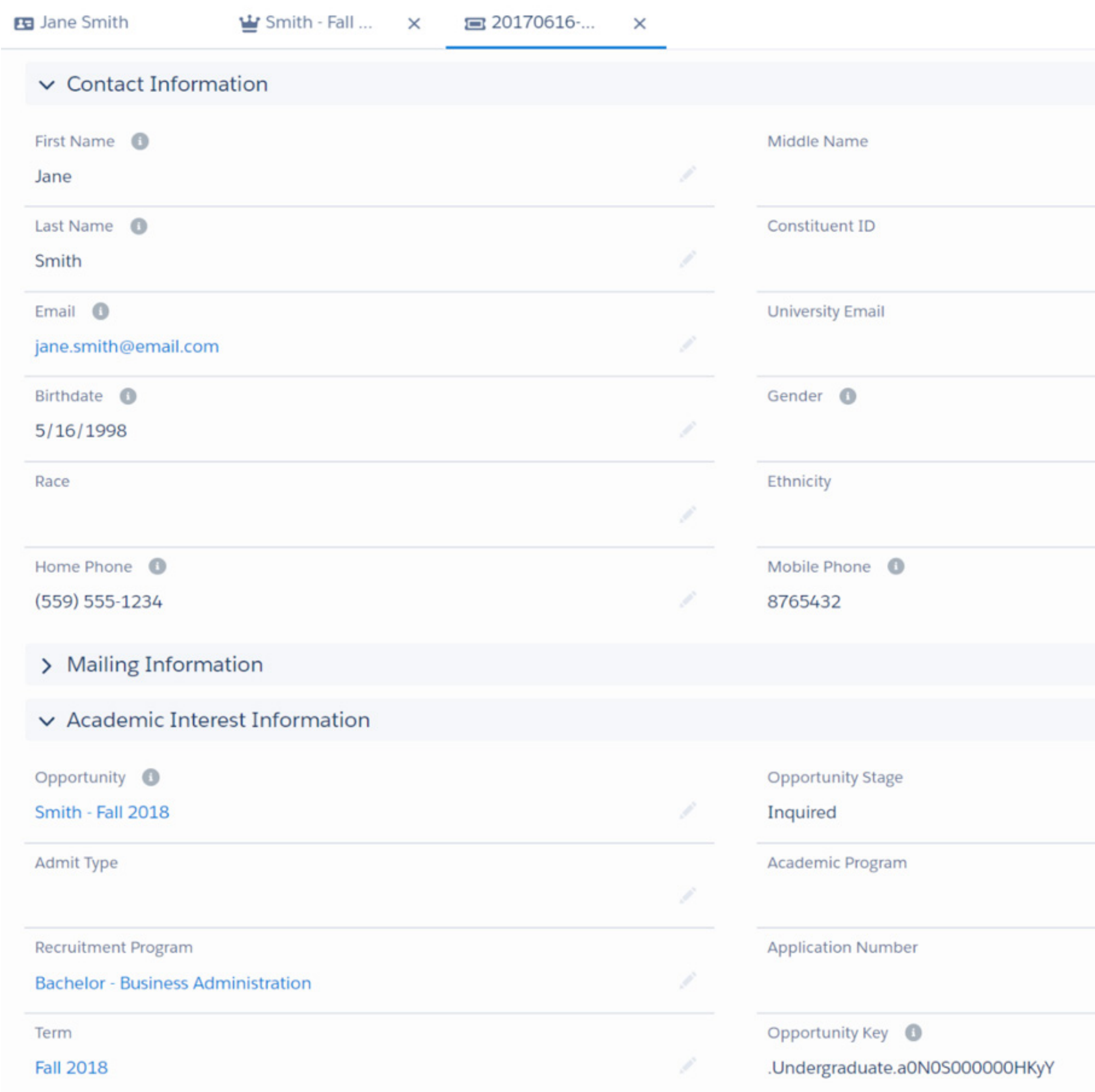



The record type is Inquiry Opportunity, and it's at the Stage of Inquired. The Recruitment Plan is "Bachelor – English" for the "Fall 2018" Term. The Lead Source and First Inquiry Source have both been tracked in the Source Information section. All of this data came from the Interaction records associated on the right.

Let's look at the Opportunity Key at the bottom of the record. The key is: "0030S000005IDuiQAG.Undergraduate.a0N0S000000HKyY."

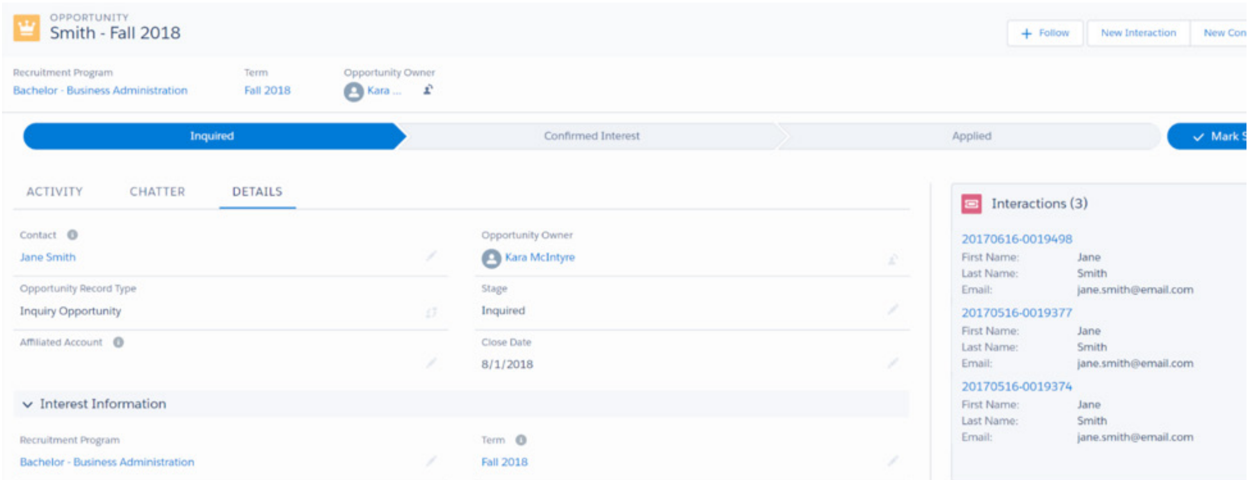
The first section represents Jane Smith's Salesforce Contact ID, followed by the level, or Career (Undergraduate), and finally the Fall 2018 Salesforce Term ID.

Jane has been getting emails and communications about the English bachelor's Plan, but she has been considering changing her major to business administration. She fills out a web form with her name and email for the "Bachelor – Business Administration" Plan for Fall 2018.




The name and email Jane entered on the web form will match her existing Contact record, and the Interaction Processor will find the Salesforce Contact ID. The fields in the Academic Interest Information section matched Jane's existing Undergraduate Opportunity based on the Career and Term; so when the code assembled the Opportunity Key, it was the same as the Key on her original Opportunity: the Contact ID "0030S000005IDuiQAG" + ".Undergraduate." + the Term ID "a0N0S000000HKyY,".

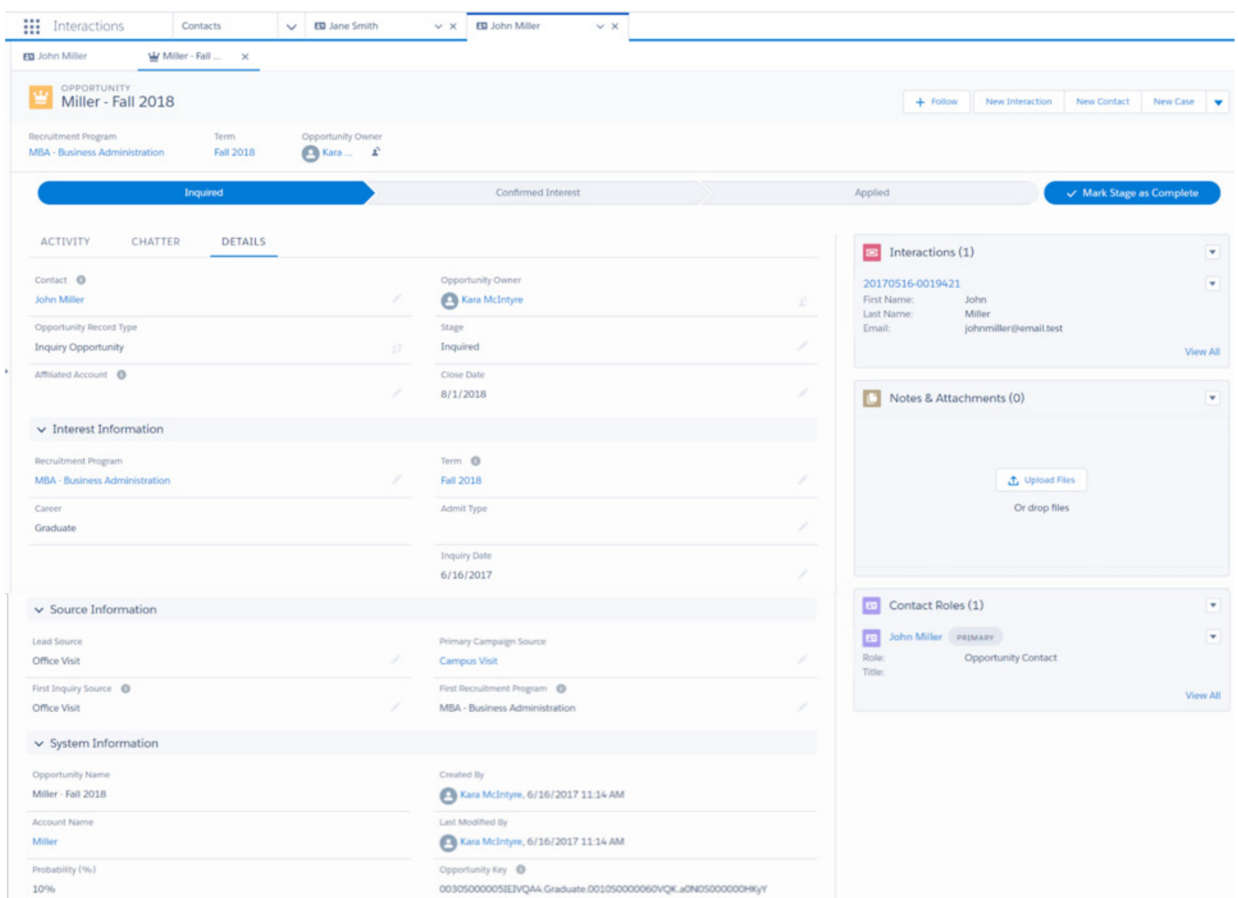
When Interaction created by the web form ran, the Interaction Processor updated Jane's existing Opportunity's Recruitment Plan, and associated the "Imported" Interaction to the Opportunity:




The undergraduate admissions team will continue to communicate with Jane, but now, any information specific to the major will reflect the fact she is interested in Business Administration instead of English.

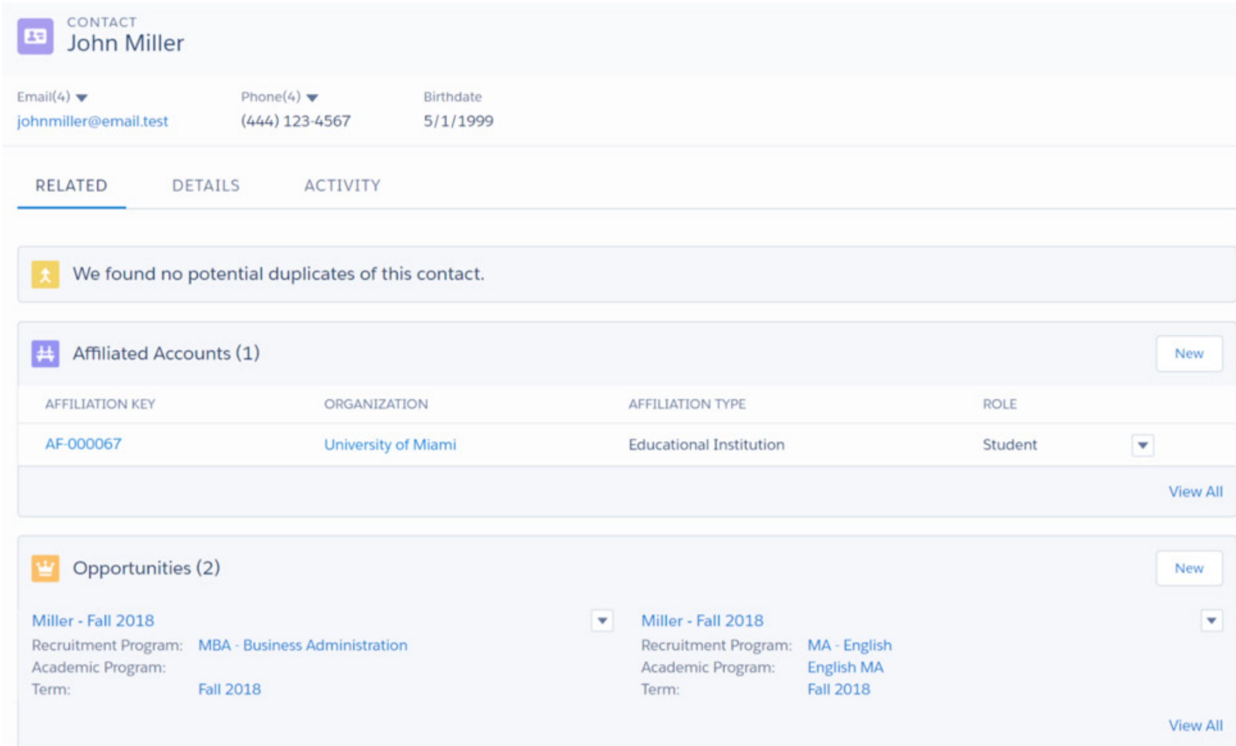
## CU's Graduate Use Case (decentralized)

John Miller is an alumnus who is interested in getting an MBA degree starting Fall 2018. Let's look at his Inquiry Opportunity in Salesforce:



The name and email John entered will match his existing Contact record, and the Interaction Processor will find the Salesforce Contact ID. The Career is still Graduate, and the Term is still Fall 2018, but the plan is now "MA – English," so when the code assembles the Opportunity Key, it will be the Contact ID "0030S000005IE-IVQA4" + ".Graduate." + Plan ID "0010S000004s9vy." + Term ID "a0N0S000000HKyY," which does not match John's existing Opportunity for the MBA Plan.

The Interaction created from the web form ran and created a new Opportunity for the MA English Plan. It also associated the "Imported" Interaction to the new record:



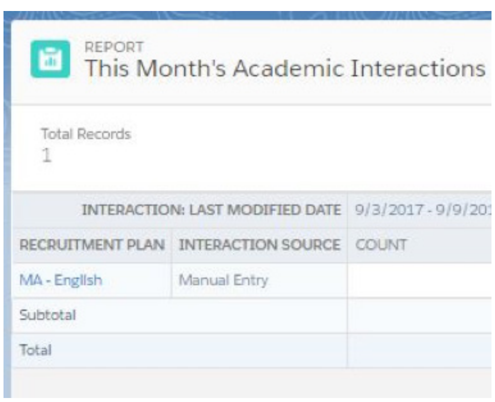

John has been receiving communication from the School of Business for his MBA Opportunity and now he will also begin receiving information from the College of Humanities about his English MA Opportunity.

## Report on Opportunities

All this information the recruiters at CU have received about Jane Smith and John Miller can help them and their marketing teams understand how recruitment is going, and make decisions about how to improve their marketing and recruitment efforts. To help the recruiting and marketing teams meet these goals, Stella gives them access to Interactions for Student Recruitment's out-of-the-box Recruitment Dashboard. Below are the steps a recruiter follows to access the dashboard:

1. Go to the Dashboard tab
2. Select All Folders and click on the Recruitment Dashboard
3. Reload the Dashboard with the most recent data by clicking the Refresh button
4. This dashboard has some basic reports that could be useful for recruitment and marketing.


5. Click on the View Report link on This Month's Academic Interactions


REPORT
This Month's Academic Interactions

Total Records
1

| INTERACTION: LAST MODIFIED DATE | | 9/3/2017 - 9/9/20 |
|---|---|---|
| RECRUITMENT PLAN | INTERACTION SOURCE | COUNT |
| MA - English | Manual Entry | |
| Subtotal | | |
| Total | | |

6. Go back to the Dashboard and click on the View Report link on Opportunities by Academic Career

REPORT
Opportunities by Academic Career

Total Records
65

| | TERM | FALL 2014 | FALL 2018 | FALL 2022 | SPRING 2018 | Total |
|---|---|---|---|---|---|---|
| CAREER | RECRUITMENT PLAN | COUNT | COUNT | COUNT | COUNT | COUNT |
| Graduate | MA - English | 0 | 5 | 1 | 0 | 6 |
| | MBA - Business Administration | 1 | 18 | 3 | 0 | 22 |
| | MBA - Executive MBA | 0 | 1 | 0 | 1 | 2 |
| Subtotal | | 1 | 24 | 4 | 1 | 30 |
| Undergraduate | BA - Business | 0 | 8 | 2 | 1 | 11 |
| | BA - English | 2 | 15 | 6 | 1 | 24 |
| Subtotal | | 2 | 23 | 8 | 2 | 35 |
| Total | | 3 | 47 | 12 | 3 | 65 |

Using this dashboard as a starting point, the recruitment and marketing teams have a clearer understanding of their data, and they are confident it lines up with both their centralized and decentralized recruitment processes. Stella was similarly excited to find that Interactions for Student Recruitment also includes a sample Admin Dashboard, tailored to help system admins quickly identify data loading and mapping errors as well as other data management reports.

Now, Stella and the recruiting teams want to dive deeper into source and campaign information to analyze the effectiveness of their Fall 2018 recruitment strategies. Continue to the next chapter to find out more about how source data is tracked.

## Resources

- Interactions User Guide
- Visualize Your Data with the Lightning Dashboard Builder Trail

# Chapter 3 – Campaigns, Campaign Members and Interactions

## Unit 3.1 – Get Started with Campaigns for Recruitment

### Learning Objectives

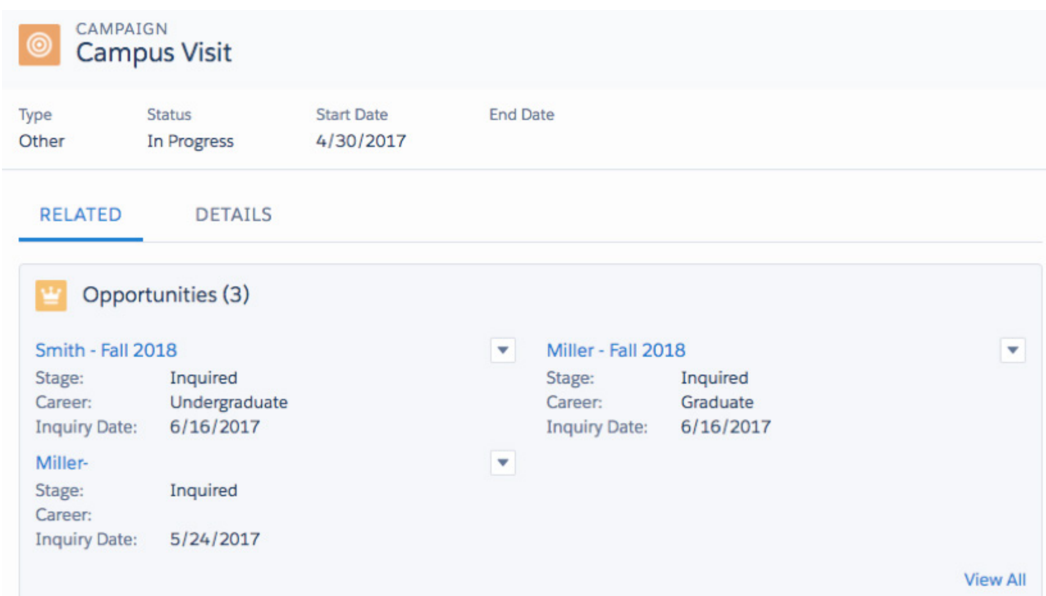
After completing this module, you will be able to:

- Understand how Interactions leverage Campaign functionality
- List common Lead Sources and how they can help support recruitment efforts
- Update Lead Sources with Interactions
- Describe how Campaigns, Lead Sources, and Interactions are connected and can be reported on

## Campaigns, Interactions and Recruitment

So far, we've seen how a system administrator can implement and customize Interactions for Student Recruitment as well as how the recruiters at CU are starting to use Interactions and Opportunities to manage their recruitment data and connect with students. In this chapter we will follow Carmen, a recruiter in the Undergraduate Admissions office at CU, as she learns how to leverage Salesforce's native Campaign functionality for recruitment. But first, a little more about Campaigns.

Natively, campaigns are used to organize and track specific marketing efforts and hosted events. Whether it's a web form on Connected University's website or a campus tour event, Campaigns allow recruiters and marketers to give credit to the marketing efforts that were most successful in recruiting the best students by linking them with Opportunities, leveraging the standard Salesforce Campaign Influence functionality.

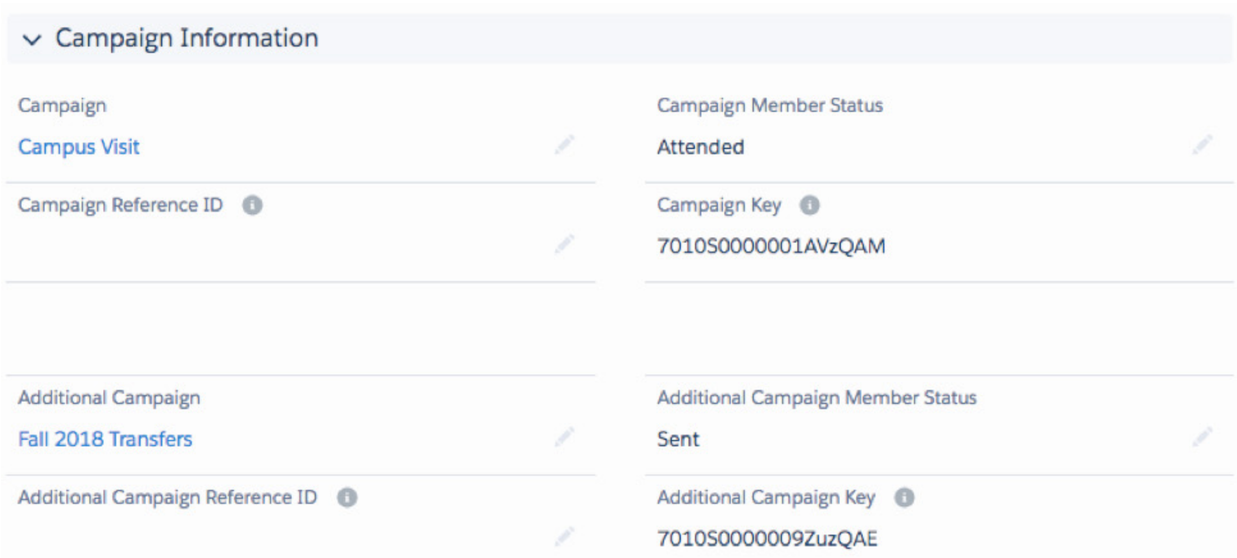



Campaign Influence can be used via the standard Primary Campaign Source field to give credit to the Campaign that brought the Opportunity in, or customize it to give credit to other Campaigns. To learn more about customizing Campaign Influence on Opportunities, visit the Track the Opportunities Your Campaigns Bring In article in Salesforce Help.

Additionally, Campaigns use statuses to track a prospect's relationship with a Campaign. Carmen, along with other recruiters at CU, want to use these statuses to trigger automatic emails such as event reminders or email blasts to communicate with the Leads or Contacts in the Campaign. They also want to use the statuses for reporting to observe how multiple Campaigns are doing on a single report.

### Campaigns and Interactions

Interaction records have two lookup fields for Campaign in the Campaign Information section: one for the main Campaign source and the other for an Additional Campaign source. If a student clicks on an ad and signs up for an event, Carmen wants Campaign Members created for both the ad Campaign and the event Campaign the prospect signed up for. By using two sets of fields, Interactions allows for the creation of both Campaign Memberships with distinct Campaign Member Statuses using a single Interaction record.

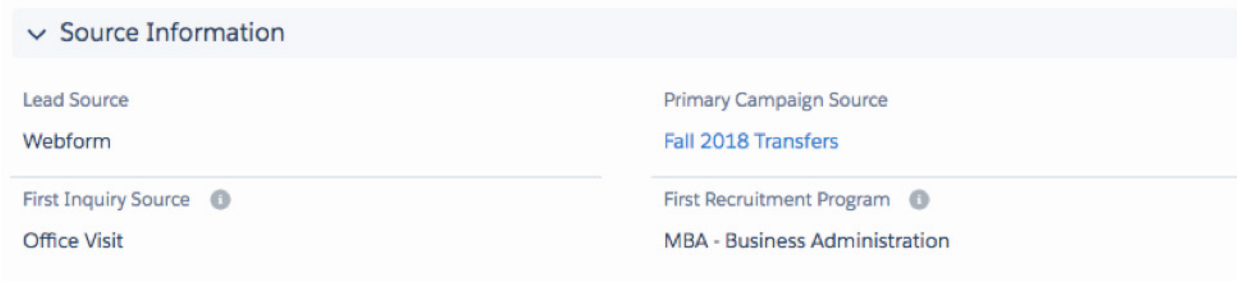



Interactions can also modify existing Campaign Members based on the prospect and Campaign. This could involve updating the Campaign Member Status or other custom fields that have been added to the Campaign Member record.

A custom identifier can be assigned to a Campaign for integration with a website or other database using the Campaign Reference ID field. If no value is added, the standard 18-digit Salesforce ID will be used instead. The Campaign Reference ID on Interactions allows system admins to identify the Campaign using the custom field instead of populating the Campaign lookup field. The Campaign Key field on Interactions displays the value the process will use to find the Campaign based on the Campaign or Campaign Reference ID.

## Lead Sources for Recruitment

Campaigns provide a lot of source information, but what about tracking other sources that may not require a Campaign, such as when a student walks into an admissions office for more information? That is where the Lead Source field comes in to play. The Lead Source field on the Contact and Opportunity records display the Lead Source from the latest Interaction logged for the Contact and/or Opportunity. The Lead Source of the first Interaction that led to the creation of an Opportunity populates the First Inquiry Source field on the Opportunity to track the original Lead Source of the record.




### Create an Interaction with a Lead Source

Shannon Jones is a high school student who has walked into CU's Undergraduate Admissions department. She speaks to Carmen about her plans for applying to CU for the upcoming Fall semester and her interest in Marine Biology. Carmen logs an Interaction to mark that Shannon came into the office and creates an Opportunity for her so she can continue to communicate with her and help her through the application process. Follow the steps below to log the Interaction for Shannon:

1. Click on the Global Action menu (+)
2. Select New Interaction
3. Fill in the details for Shannon Jones. Specifically include...
    a. Her first and last name: Shannon Jones
    b. An email address
    c. A Lead Source of "Office Visit"
    d. A Recruitment Program of "Bachelor – Marine Biology"
    e. A Term of "Fall 2018"
4. Click the Save button
5. View Shannon's Contact and Opportunity record
6. Note the Lead Source on both and the First Inquiry Source on the Opportunity

Carmen has created the records and tracked the necessary information for Shannon in just a few steps. Now she can focus on helping Shannon through the recruitment and application process knowing all the data needed for the marketing team and other Undergraduate Admissions recruiters is in Salesforce. Join us in the next unit as Carmen dives deeper into custom Campaign Member Statuses and reporting.

## Resources

- Interactions User Guide
- Interactions Installation and Configuration Guide
- Interactions Technical Implementation Guide
- Configure Campaign Influence Salesforce documentation
- Add or create a new Lead Source Salesforce Knowledge article

# Unit 3.2 – Create and Report on Campaign Members and Interactions

### Learning Objectives

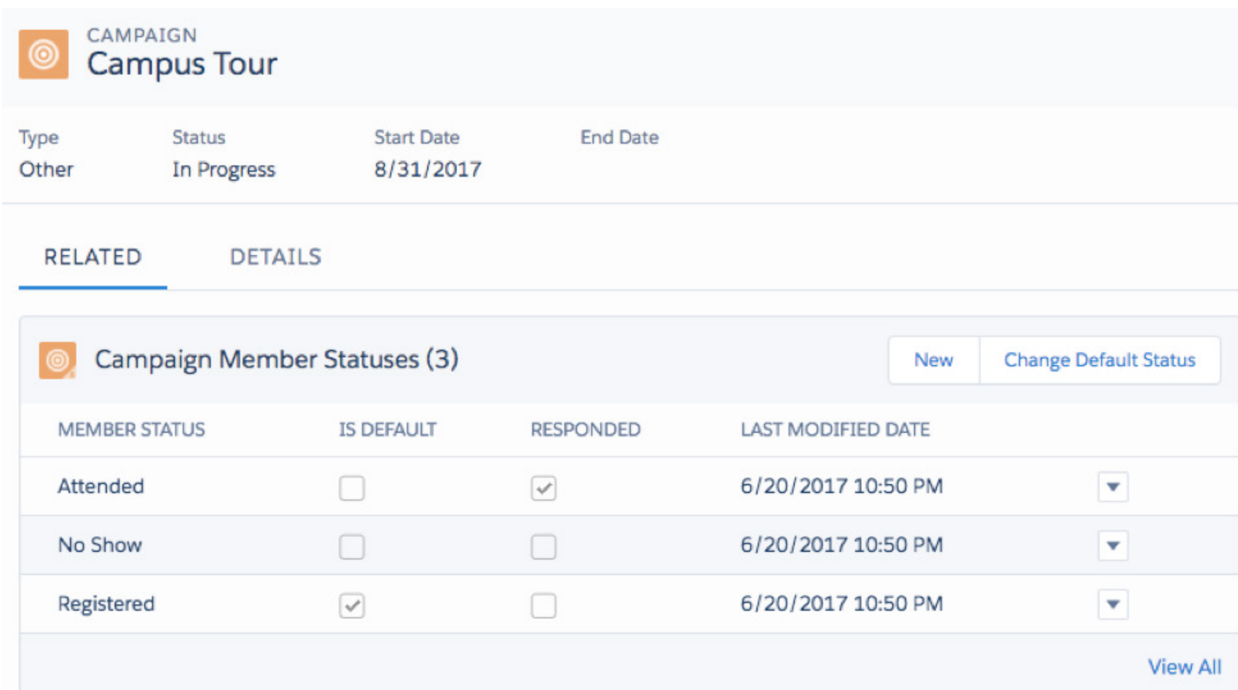
After completing this module, you will be able to:

- Describe the process of adding a Campaign Member Status to Interactions
- Create Campaign Members with Interactions
- Report on Campaign Members and Lead Sources

## Campaign Member Statuses

CU is now using Campaigns to track their events to see how many people registered and attended, or registered but were no shows. To identify those who registered previously and attended or not, recruiters use custom Campaign Member Statuses such as “Registered”, “Attended” and “No Show”.

Additionally, they’ve created workflows to automatically send a confirmation email after registration and an event reminder email to all those with a status of “Registered” two days before the event to provide them with a daily parking pass and campus map. Take a look at a Campus Tour Campaign:




In the last unit, we followed Carmen, an Undergraduate Admissions officer. When hosting a Campus Tour event, Carmen logs Interactions for each student that signs in with her to update their Campaign Member Status to “Attended” and any other information the prospective student gives her. However, she’s realized that with every Campus Tour that is held, there are always a few students who simply show up for the tour without having registered. Since the “Attended” status indicates a prospect who registered and attended the event, she wants to add a new status for walk-ins.

To do this, Carmen needs to add the new Campaign Member Status value to both the Campaign and the Interactions object. She adds the new Status to the Campaign via the Campaign Member Statuses related list on the "Campus Tour" Campaign, and asks the system administrator, Stella, to update the Campaign Member Status picklist field on Interactions. Follow along using the steps below:

### Add new Campaign Member Statuses to Campaigns and Interactions

1. Click on the Campaign tab and select "New" to create a new Campaign with these values:
    a. Campaign Name = Campus Tour
    b. Active = checked
    c. Status = In Progress
    d. Type = Event
2. On the Campaign Member Statuses Related List, update the "Sent" Member Status:
    a. Member Status = Registered
    b. Leave the Default checkbox checked
    c. Responded checkbox = checked
3. Update the "Responded" Member Status:
    a. Member Status = Attended
    b. Leave the Responded checkbox checked
4. Add a Member Status using the New button on the Campaign Member Statuses Related List:
    a. Member Status = No Show
    b. Responded checkbox = checked
5. Add a Member Status using the New button on the Campaign Member Statuses Related List:
    a. Member Status = Walk-in
    b. Responded checkbox = checked
6. Go to Setup > Object Manager > Interactions > Fields & Relationships
7. Click on the Campaign Member Status picklist field
8. Click the New button in the Values section
9. Enter the new value of "Walk-In" and click the Save button

On the day of the campus tour, a high school student named Bryan Smith comes up to Carmen to sign-in for the Campus Tour event. She asks whether he was registered for the event and what his term and academic interests are. He tells her that he did not register for the Campus Tour, but he is interested in applying for the next Spring semester to pursue an English major. Follow the steps to log Bryan's Interaction record:

### Create Campaign Members with Interactions

1. Click on the New Interaction button on the Campaign record.
2. Select New Interaction
3. Fill in the details for Bryan Smith. Specifically include...
    a. His first and last name: Bryan Smith
    b. An email address
    c. A Lead Source of "Campus Visit"
    d. A Recruitment Plan of "Bachelor – English"
    e. A Term of "Spring 2018"

f. Ensure the Campaign, “Campus Tour”, is pre-filled
g. Set the Campaign Member Status to “Walk-In”

4. Click the Save button
5. View Bryan’s Contact record. Look at the Campaign History related list and note that he was added with a status of “Walk-In.”

Additionally, check out the Campaign and/or Opportunity to see how they’re connected. Since Bryan is new to the system and this is his first Campaign and Opportunity, the Opportunity should have been added to the Opportunities related list on the Campus Tour Campaign record.

## Analyze Recruitment Data

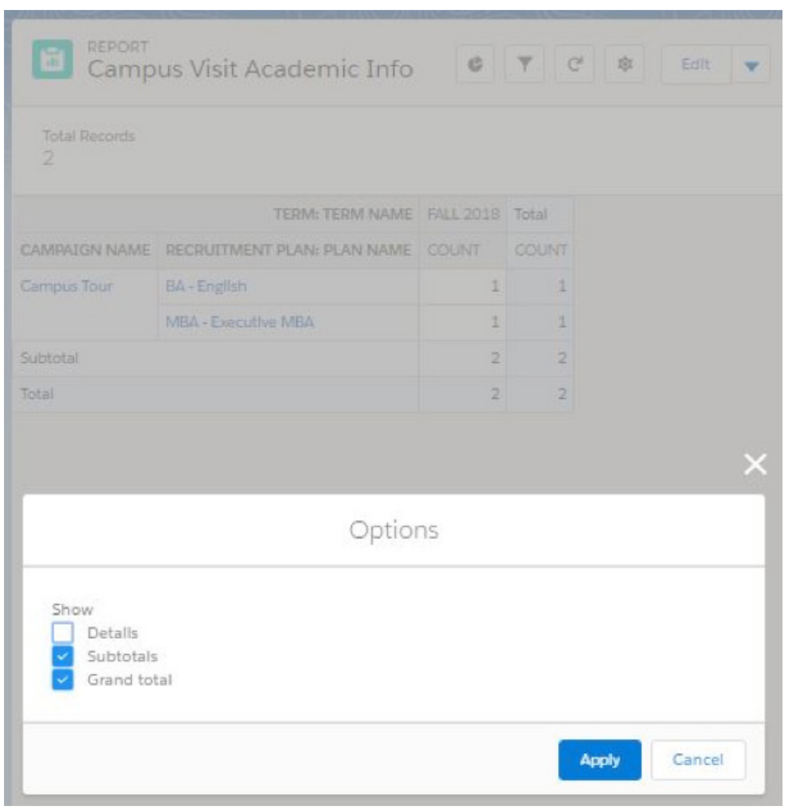
Carmen wants to report on the Contacts and Opportunities related to the Campus Tours she’s held in the past week. She utilizes the Recruiter Dashboard Stella, the system administrator, told her and her team about as a starting point:

### Using the Recruiter Dashboard to Report on Campaigns

1. Select the Dashboards tab
2. Click on All Folders
3. Select Interaction Dashboards
4. Click on Recruiter Dashboard

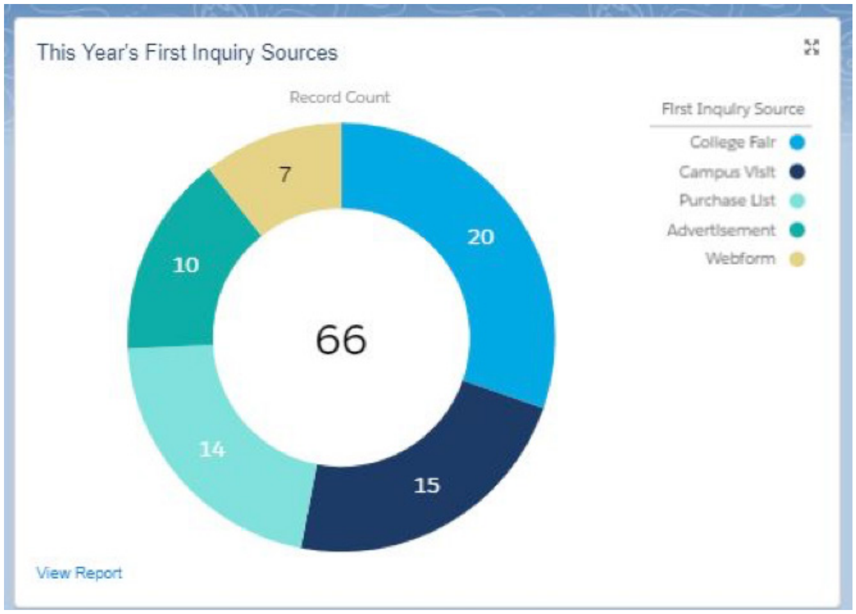
5. Locate the Campus Visit Academic Info component in the bottom right of the Dashboard and click on the “Campus Tour” label at the bottom to open a filtered version of the report


6. Click the gear icon to access Options, check the box next to Details and Apply to see more information about the Opportunity and Contact found in the report



Carmen was able to identify the Opportunities created from Campus Tours, and drill down to see the Opportunity and Contact data. However, Carmen's director wants a high-level understanding of all their data sources for this year. Carmen's steps are below:

1. Select the Dashboards tab
2. Click on the Recruiter Dashboard from the Recent section
3. Find the component called This Year's First Inquiry Sources in the top middle of the Dashboard




4. Your graph should return at least one record with a First Inquiry Source of Campus Visit

Now that you know how Interactions uses Campaigns, Campaign Members, and Lead Sources to easily track how data enters Salesforce to help you analyze the best way to connect with prospects, it's time to try it out for yourself. Create more test data, update the dashboard to fit your unique use cases, and you will see for yourself how these tools can greatly enhance your recruitment processes.

## Resources

- Interactions User Guide
- Lightning Experience Reports & Dashboards Trailhead Module