YouVisit Data Loads

1. Login to YouVisit (pull up directions from Jordan)
   1. Link: <https://luky-my.sharepoint.com/:w:/g/personal/dja228_uky_edu/EfHHsQ9RImFHgVLDae1ui6MBANzo17aX_NyVYUyi8a57zg?e=gQNAgD>
2. Pull correct data on YouVisit website based on last time it was pulled
3. Do an initial clean of the data.
   1. Under the **Visitor Type** column: filter and remove any students that aren't either high-schoolers or transfer students
   2. Remove the following columns after that: **Platform, Registered On, Current School, Major ID, Unsubscribed** and **Registration Type**. We are removing those because there aren't any fields that they can contribute to in SF.
   3. Create the Concat ID column now
      1. Make a new column with the header: **Concat ID**
      2. = lower($FirstName & $LastName & left($StreetAddress, 10))
4. Pull the 5 de-dup data files from Salesforce/Hana
   1. Hana: SAP Applicant
   2. SF Report: [20-21 Transfer Pop](https://uky.lightning.force.com/lightning/r/sObject/00O1K000008gXdsUAE/view?queryScope=userFolders), [20-21 UK Marketing Pop](https://uky.lightning.force.com/lightning/r/sObject/00O1K000008gHA1UAM/view?queryScope=userFolders) , [20-21 EAB Marketing Pop](https://uky.lightning.force.com/lightning/r/sObject/00O1K000008gHA6UAM/view?queryScope=userFolders), [20-23 Prospects (No Comm Owner)](https://uky.lightning.force.com/lightning/r/sObject/00O1K000008gRY3UAM/view?queryScope=userFolders)
5. For each SF Report de-dup data file, create the Concat ID.
   1. Make a new column with the header: **Concat ID**
   2. = lower($FirstName & $LastName & left($StreetAddress, 10))
6. After creating the Concat ID’s, place the SF ID to the right of it. Do the exact same thing with Emails and SF ID.
   1. This is to help with the vlookup function when we de-dup the files.
7. For the SAP Applicant File from Hana, follow these instruction:
   1. VORNA = First Name, NACHN = Last Name, FMTSTREET = Street Name, STUDENTSHORT = Student Number
   2. "= lower($FirstName & $LastName & left($StreetAddress, 10))" to create the Concat ID column
   3. Repeat step 6, but use the Student Numbers instead of SF ID
8. After creating the Concat ID's, place the SF ID to the right of it. Do the exact same thing with Emails and SF ID.
9. Time for the de-dup: use the email and the Concat ID to see what SF Id's exist.
   1. Use the Vlookup function. After SF ID’s/Student Numbers are found – track them with a new excel file and delete the record in the YouVisit file
      1. Place the SF Id's from the SF reports into a separate file with the column header "ID"
      2. You'll also create a second column with the header "YouVisit Date", under this column place today's date.
      3. Do the same thing with student numbers except place them in their own separate report (we are going to ad-hoc these later).
10. Clean the YouVisit file a bit more
    1. Under the Visitor Type column, if any students indicated that they are transfers- replace that cell with "Transfer". Every other cell in that column will be changed to "Freshman"
    2. Under the 'Country' header, replace all 'United States' with 'US'
    3. Make sure the first name, last name, street address, and city are all capitalized properly (you can use the "= Proper()" function). Also check to make sure that all the states are real states.
    4. Change the majors to their UK equivalent
       1. Use Vlookup with the Major lookup excel sheet (I will provide that)
       2. For majors that aren’t there, look up their UK equivalent and manually add them to the excel list
11. Use a finished version of YouVisit to systematically put the information in a format that Salesforce can read
    1. Fill in the Load Date as today’s date
    2. **Enrollment Year** = **HS\_GRADUATION\_YEAR\_\_C**
    3. **Year\_c** = **HS\_GRADUATION\_YEAR\_\_C** + 1
    4. **TERM\_\_C** = “Fall”
    5. **STUDENT\_STATUS\_\_C** = “Inquiry”
    6. **STUDENT\_TYPE\_\_C** = **Visitor Type**
12. Upsert the student numbers
    1. Pull them from Salesforce and add their SF ID’s to the other excel sheet with the **ID** Column
13. Update the Contact ID’s in Salesforce
14. Insert the final excel file into the RFI object
15. In a few hours, update the comm owner in SF