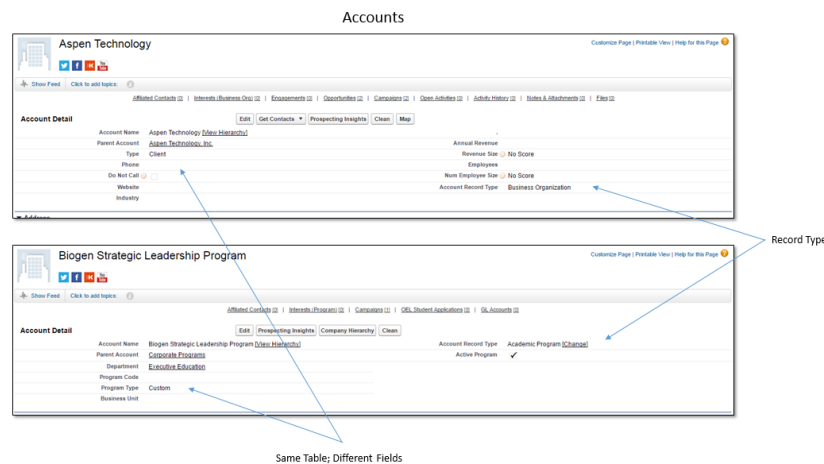


Record Types

Record Types allows Salesforce to offer different business processes, picklist values, and page layouts to different users (depending on a user's profile.) The user's profile determines which records types a user can select.

Accounts:

Accounts

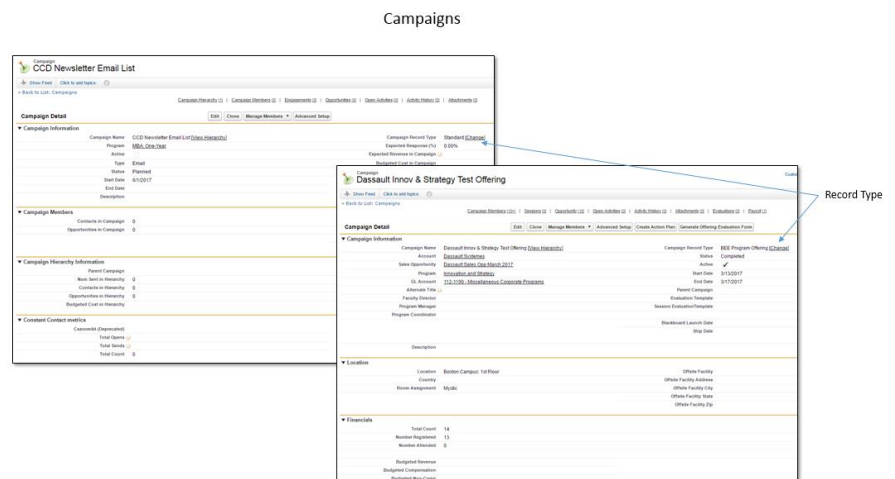


Same Table; Different Fields

Campaigns

Both of these records are Campaign records. However, the one on the left is a Standard Marketing Campaign, and the one on the right is a BEE Program Offering, as indicated by the Record Type field. Note the fields on each record pertain to the Record Type. For example, the marketing campaign indicates that it is an email campaign that starts on 6/1/17 while the Program Offering has fields relating to the general ledger account, program personnel, location, etc.

Campaigns



Salesforce Objects' Record Types and Profile Access

A combination of the user's profile and record type of the record determines the page layout available to users.

Babson Profiles are as follows:

- BEE Business Development
- BEE Executive User
- BEE Finance
- BEE Marketing
- BEE Operations
- BEE Standard User
- BEE Student User
- Standard CCD
- Standard CCD EL
- Strategic Partnership

Record Type Access:

Y = Access available to users assigned to the profile;

(BLANK) = No access for users assigned to the profile

IMPORTANT NOTE: Access to a record type does not guarantee full access to the data within that record type. Some profiles may have read-only access to the data in a particular record type noted with an (*) below. Additionally, data may also be secured based on organization wide access decisions.

	BEE Bus Dev	BEE Exec User	BEE Finance	BEE Mark- eting	BEE Operat- ions	BEE Std User	BEE Student User	Std CCD	Std CCD EL	Strategic Partner- ship
Account										
Academic Program	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Administrative	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Business Organization	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Educational Institution	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Sports Organization	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
University Department	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Contact										
CRM Contact	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Connector	(To be determined by Babson IT)									
Opportunity										
BEE Faculty Agreements	Y	Y*	Y	Y	Y	Y*				
BEE Invoice	Y*		Y		Y					
Contracts								Y	Y	Y
Faculty Expenses			Y		Y					

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	BEE Bus Dev	BEE Exec User	BEE Finance	BEE Mark- eting	BEE Operat- ions	BEE Std User	BEE Student User	Std CCD	Std CCD EL	Strategic Partner- ship
Opportunity (continued)										
OEL Project Proposals								Y	Y	
OE Registration	Y	Y*	Y	Y	Y	Y*				
Standard Sales	Y	Y*	Y	Y	Y	Y*	Y*			Y
Campaign										
BEE Program Offering	Y	Y	Y	Y	Y	Y	Y			
Event	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Standard	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Strategic Partnership Event								Y	Y	Y
Engagement										
Prospective Engagement	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Engagement	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y