

Accounts and Contacts

This document provides basic instruction on creating and maintaining Accounts and Contacts.

For more information, see the Salesforce Trailhead trainings:

https://trailhead.salesforce.com/en/modules/admin_intro_accounts_contacts

HEDA (HEDA) provides the foundation to empower institutions of all sizes to connect with students, alumni, faculty, and staff in new ways. As an open data architecture, built on top of the Salesforce Platform, HEDA allows you to add any applications and custom functionality you might need. For more information on the functionality HEDA provides, see the Salesforce Trailhead trainings:

https://trailhead.salesforce.com/en/modules/highered_heda_basics

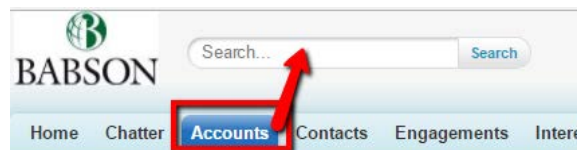
Accounts

Accounts represents several different types of data as a result of the HEDA package:

- **Business Organizations – A Business Organization; SYSTEM DEFAULT SETTING**
- Academic Program - An Academic Program offered at the University
- Administrative – Used for behind-the-scenes Administrative purposes only
- Educational Institution - An Educational Institution
- Sports Organization - A Sports Organization
- University Department - A Department in the University

Adding New Accounts:

1. **Search to determine if the organization already exists in the system.**

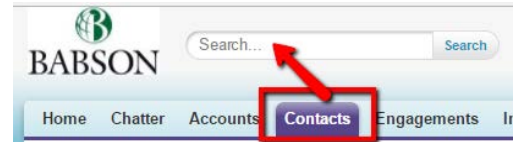


2. If the Account does not already exist, then go to the Accounts tab and click 'New'.
3. Use the default Record Type (Business Organization) or select the appropriate Record Type then click 'Continue'.
4. After filling out all required and relevant fields click 'Save'

Contacts

Adding New Contacts:

1. Search to determine if the contact already exists in the system

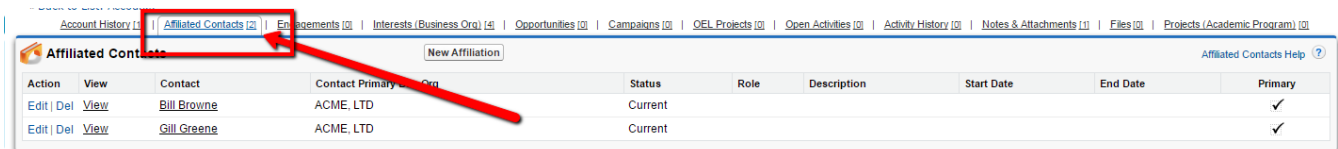
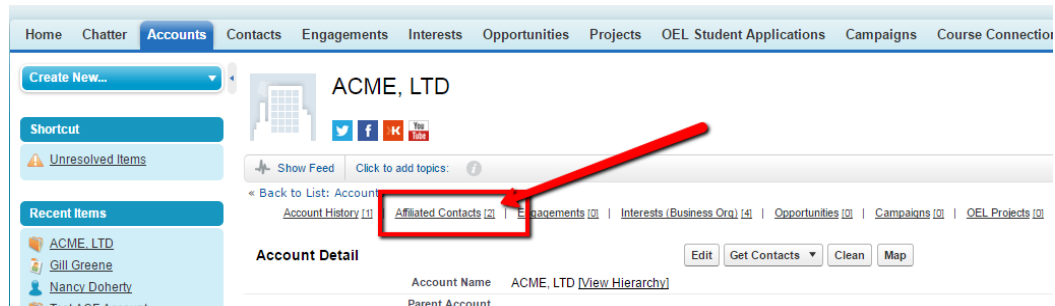


2. If the contact does not exist, then go to the Contacts tab and click 'New'.
3. To associate the contact to an existing Account, enter / search for an account using the Primary Business Organization field.
4. Click 'Save'.

Note!! If a value was entered into the Primary Business Organization field, a new Affiliation record will be automatically created to associate the Contact to the Account!

Associating Existing Contacts to an Existing Account:

1. From the account record, scroll down to Affiliated Contacts related list or Related List Section:



OR

2. Click 'New Affiliation' button.
3. Complete contact information for all required and relevant fields and click 'Save'.