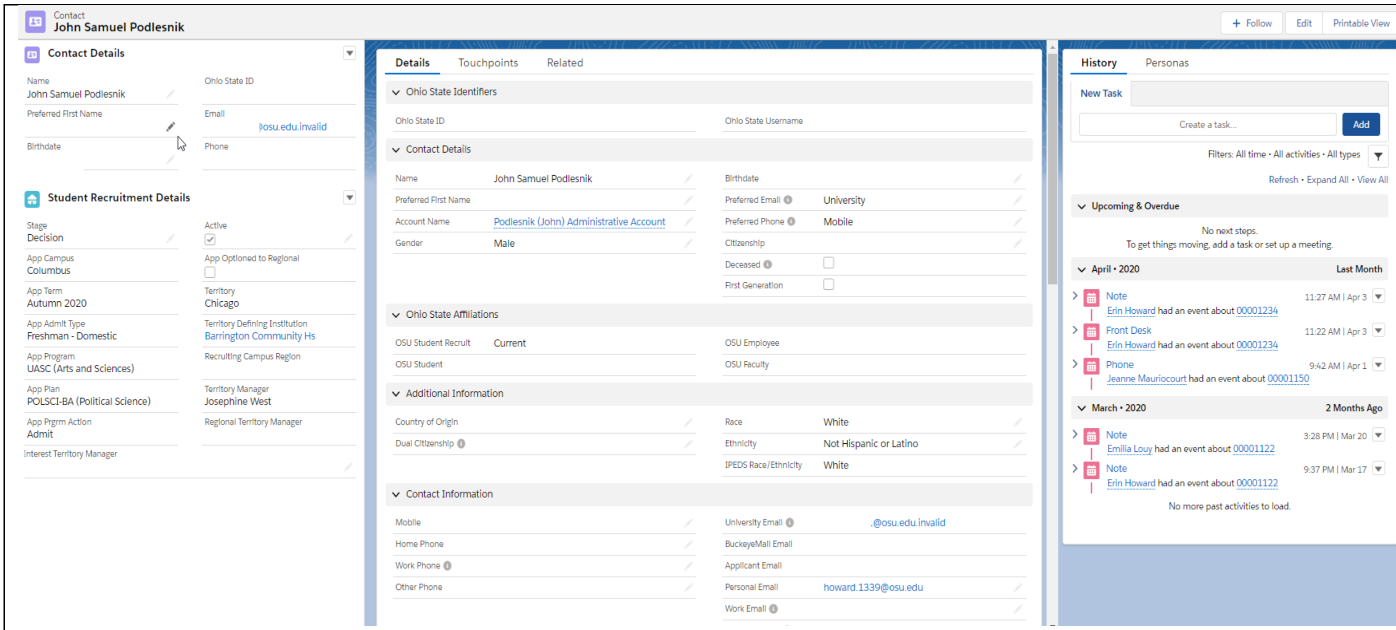
CONTACT NAVIGATION

When you pull up a contact in Salesforce, you will be presented with a 3-column view.



The left column is "pinned," meaning no matter what you navigate to within the contact, this sidebar will remain.

Since it's always visible, key details about the person have been surfaced from the Contact and related Student Recruitment record.

The middle column contains three tabs that help you navigate to different data about that person.

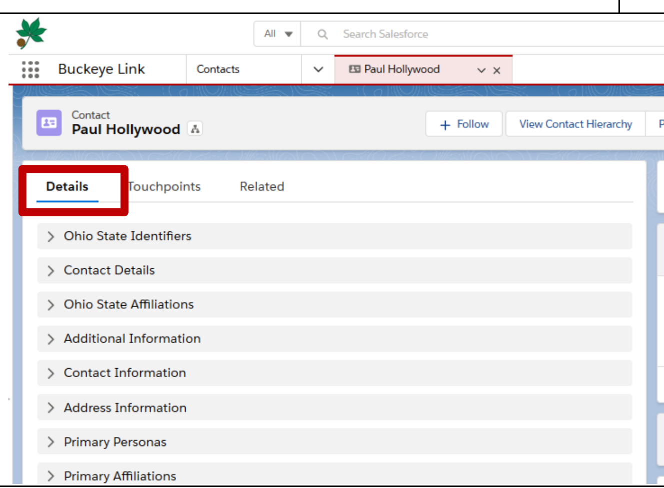
The right column includes a History component with a contact's recent activities and a Personas tab that will allow you to navigate to the related Student and Student Recruitment records.

Details

The Details tab contains data fields that are stored on the Contact Record

Fields on a Contact's Record are grouped into sections (Ohio State Identifiers, Contact Details, etc.)

To view fields, click the gray bar to expand the section and



<table>
<tr><td>viewing additional fields [see next section for an example]</td><td></td></tr>
<tr><td>

Details

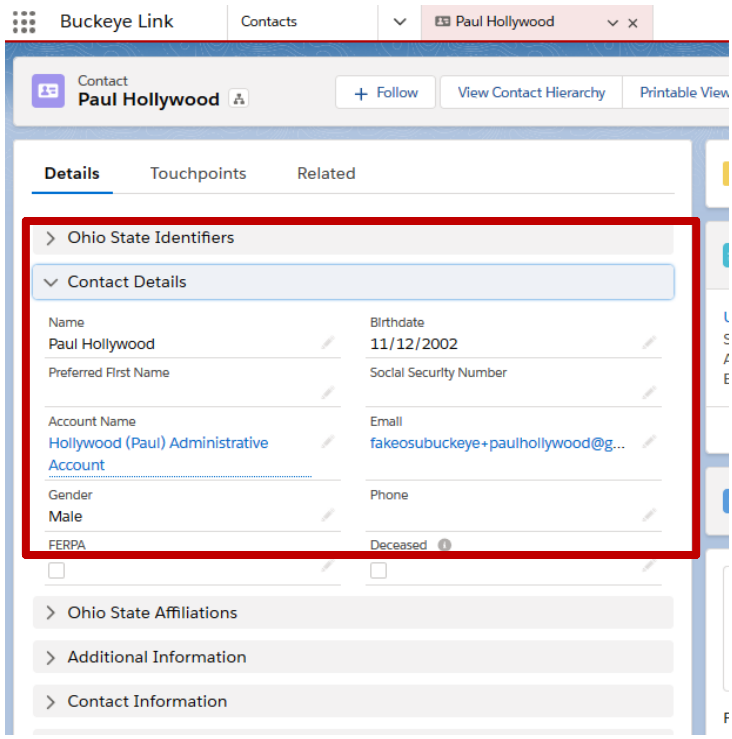
This is an example of an expanded section of data fields

Contact Details has been expanded to show data fields, such as name and birthdate

Clicking the gray bar will collapse the section

Salesforce remembers your preference for having sections expanded or collapsed

</td><td>



</td></tr>
</table>

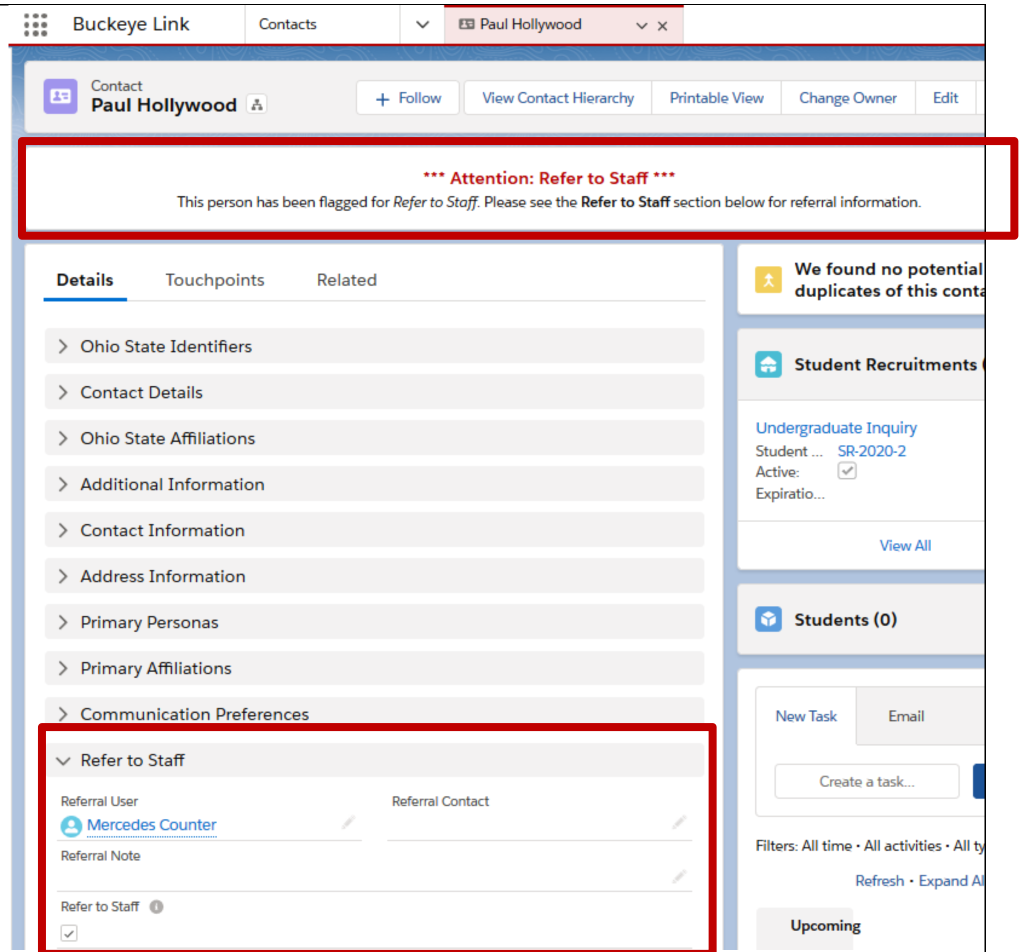
Refer to Staff

Under Details, the Refer to Staff feature allows users to indicate when a Contact requires referral

The Refer to Staff section includes:

- Referral User lookup: use this field to indicate the Contact should be referred to a Salesforce User
- Referral Contact lookup: use this field to indicate the Contact should be referred to another Contact in Salesforce
- Referral Note: if the referral is not a User or Contact in Salesforce (e.g., refer to campus police), make a note in this field

If a Contact is saved with one of the Refer to Staff fields populated, Salesforce will check the Refer to Staff box and the Attention message will appear at the top of the page



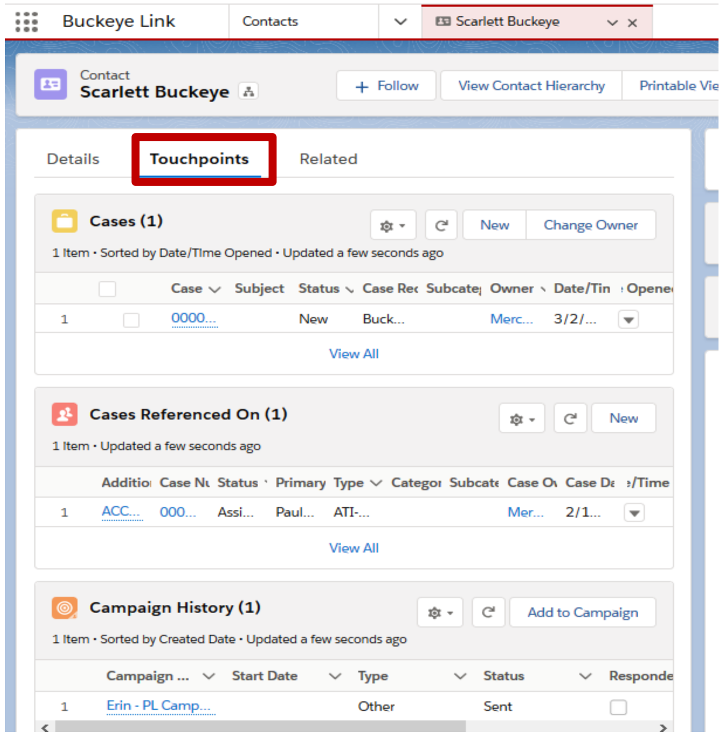
Touchpoints

In this example, we are viewing the Contact Record for Scarlett Buckeye

Click the Touchpoints tab to access the following information about the Contact:

- Cases
- Cases Referenced On
- Campaign History

[examples follow]

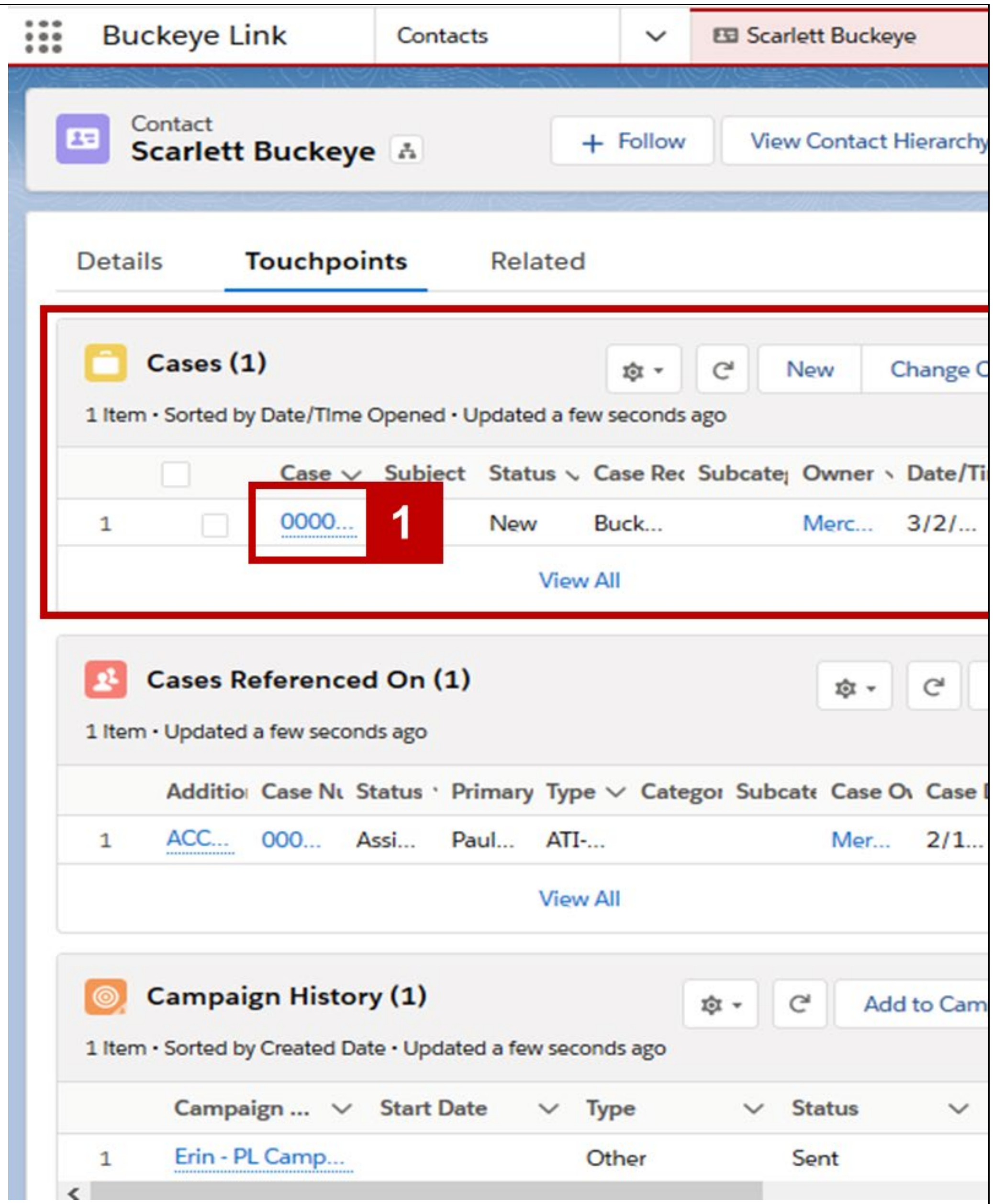


Touchpoints > Cases

Case Records in Salesforce are similar to “tickets” in HelpSpot or “interactions” in Talisma

Hover over the Case link [1] to preview details about the Case

Click the Case link [1] to open the Case record. The Case record will open as a subtab under the Contact



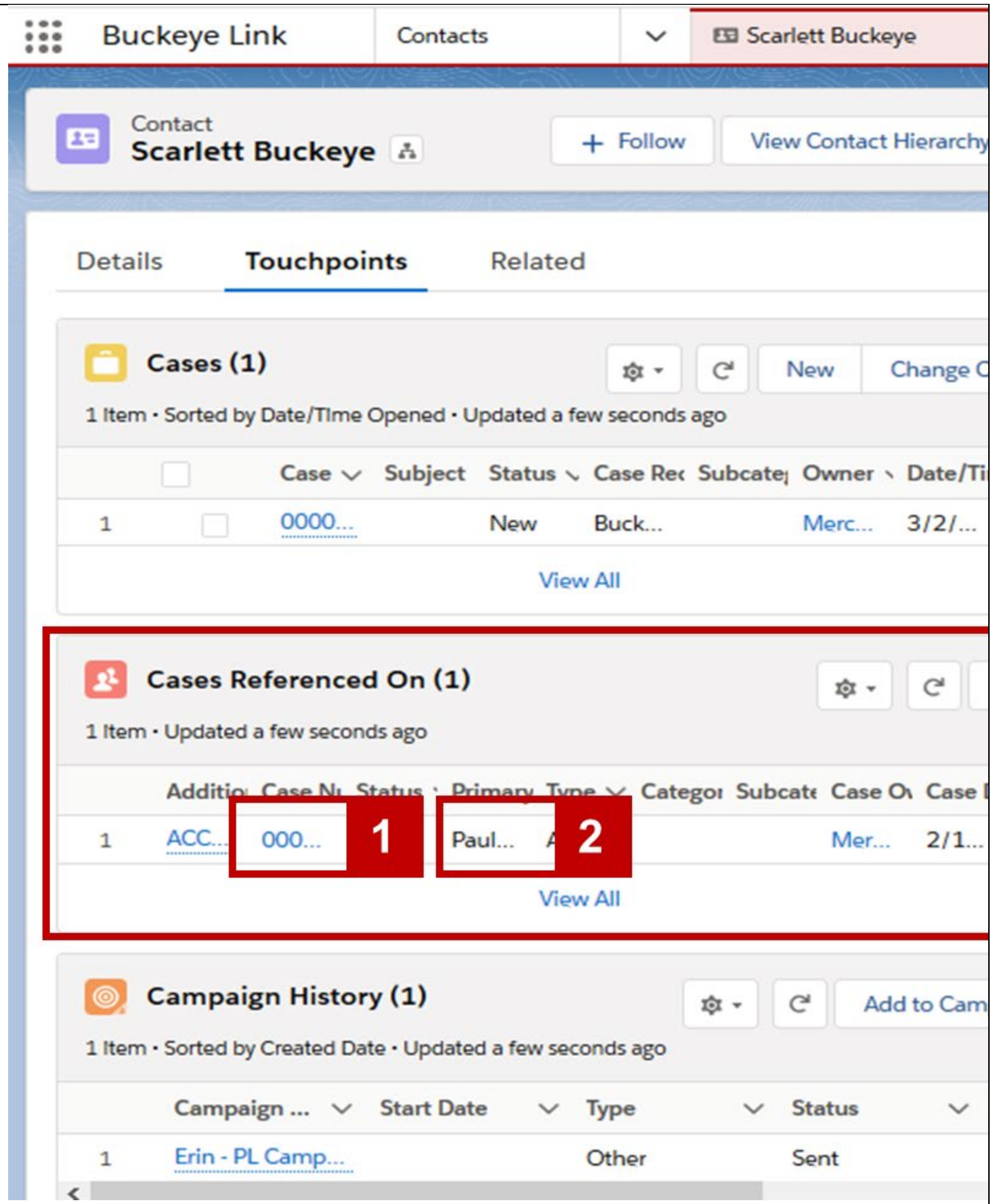
Touchpoints > Cases Referenced On

Cases Referenced On allows users to associated more than one Contact with a Case

Cases Reference On for a Contact shows users Cases for which the Contact is not the primary contact

In this example, Paul [2] is the Primary Contact; he is calling about Scarlett

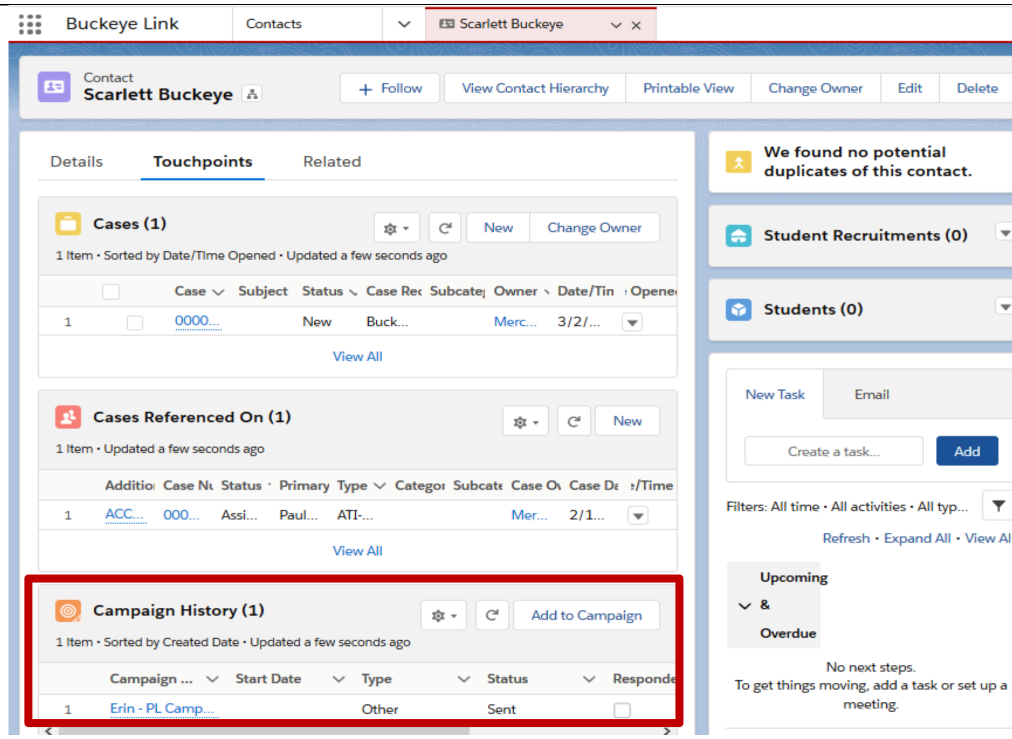
Hover or click the Case link [1] for more details



Touchpoints > Campaign History

In Salesforce, Campaigns represent an initiative -- such as email, direct mail, events, or telecounseling -- that has a group of Contacts associated with it

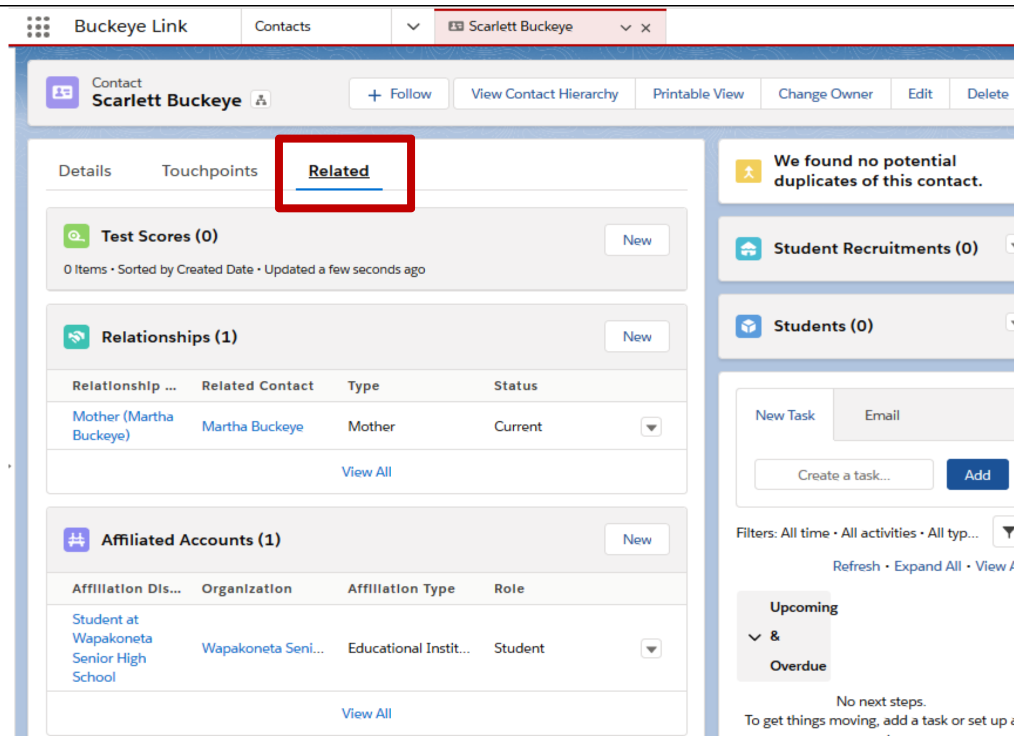
A Contact's inclusion in a Campaign is represented here

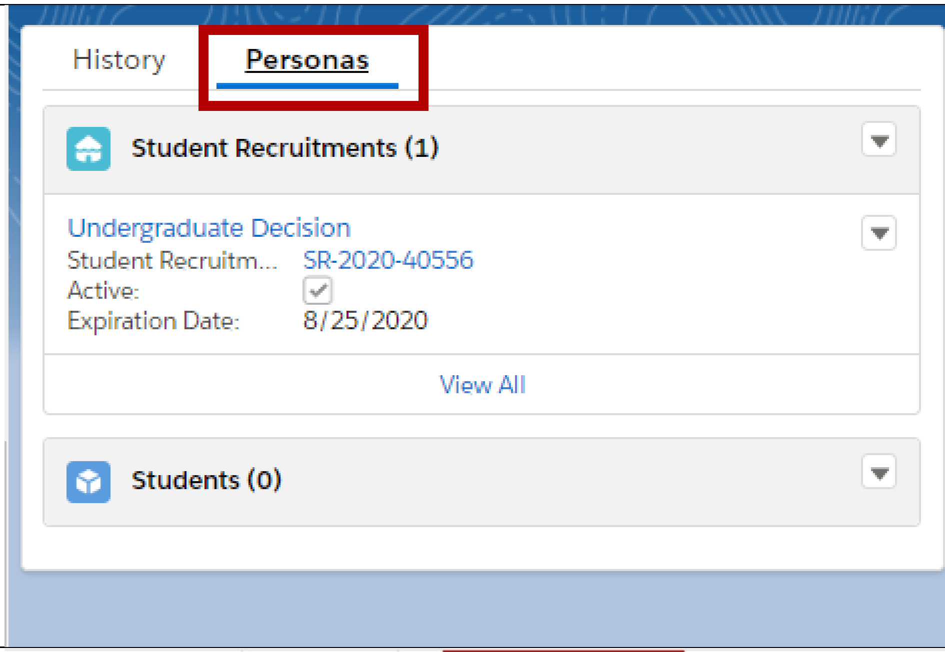
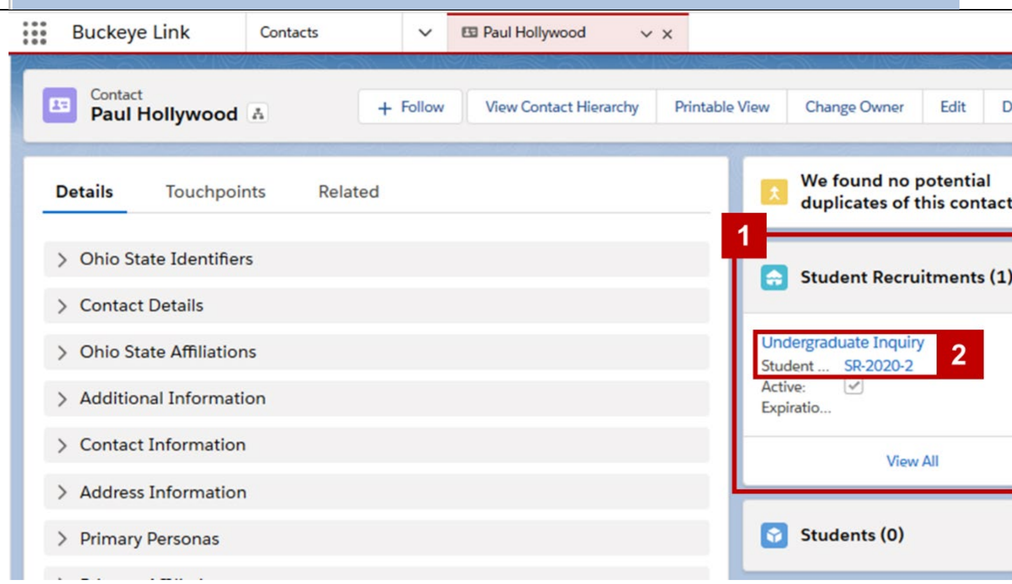


Related

Click the Related tab to view:

- Test Scores – Salesforce will list the same test scores that were available in Talisma
- Relationship, e.g., parent or guidance counselor
- Affiliated Accounts, e.g., high school

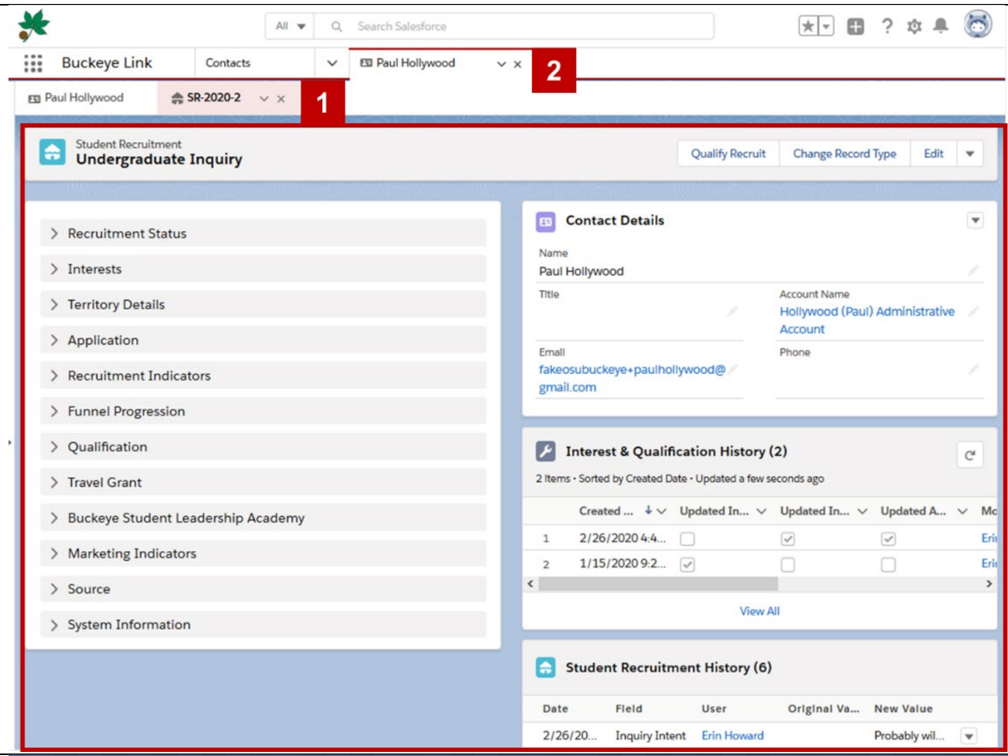


Personas The Personas tab is where a user can view additional information about a contact. As a contact mainly stores bio/demo information, data related to a specific aspect of the contact is stored on these related objects. For now, only two persona objects exist, Student Recruitment and Student.	
Student Recruitment The majority of information that users referenced in Talisma will be stored under the Student Recruitment Object The right pane of the Contact record displays a Contact's Student Recruitments [1] (if a Student Recruitment Record exists) Click either link [2] to access the Contact's Student Recruitment Record	

Student Recruitment

Clicking on a Contact's Student Recruitment Record link opens the Student Recruitment Record [1] as a subtab of the Contact [2]

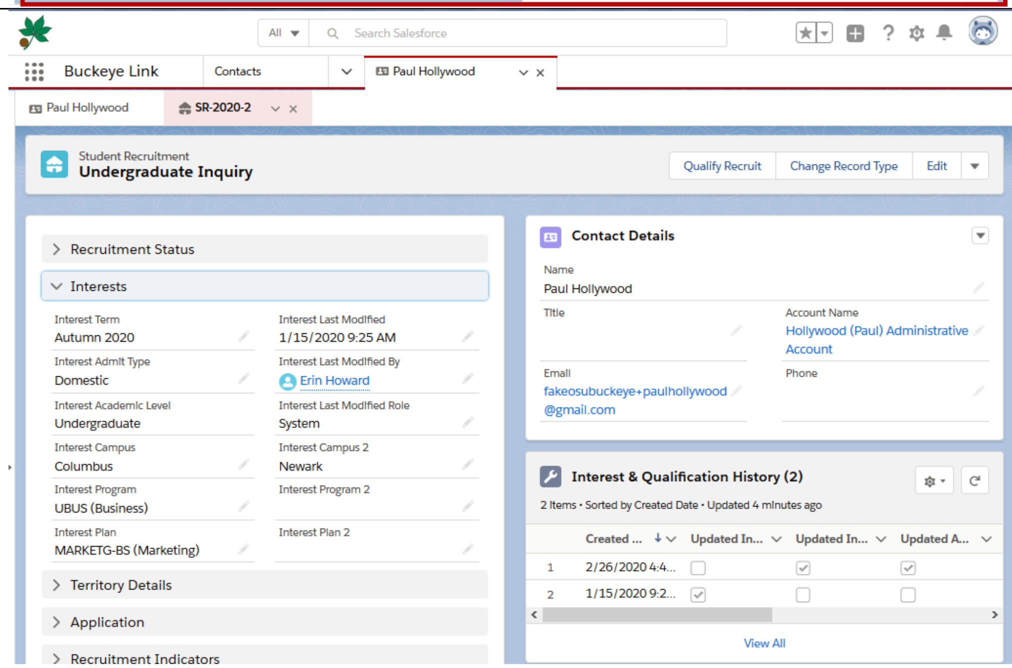
Note: Sections of available fields may differ by user group



Student Recruitment

Similar to Contact Details, Student Recruitment data fields are organized into sections: Recruitment Status, Interests, Territory Details, etc.

To view fields, click the gray bar to expand the section and view additional fields; click the gray bar again to collapse the view



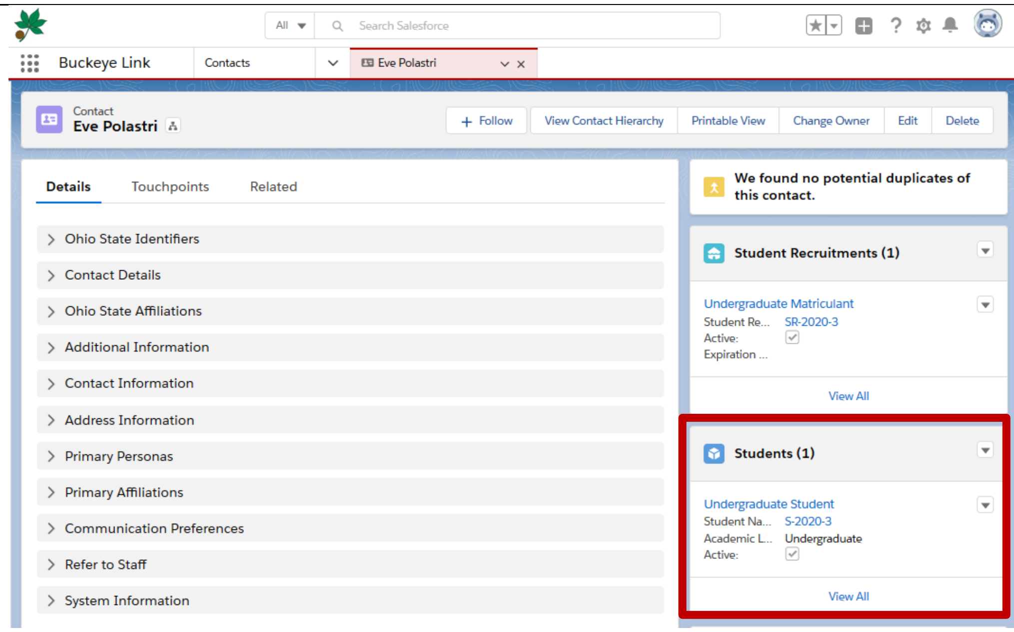
Student

The right pane of the Contact record displays a Contact's Student Record (if one exists)

Note: SIS is the system of record for Student Information

Student Object Records in Salesforce will primarily be used by First Year Experience Peer Leaders

Student Object Records in Salesforce do not take the place of information in SIS

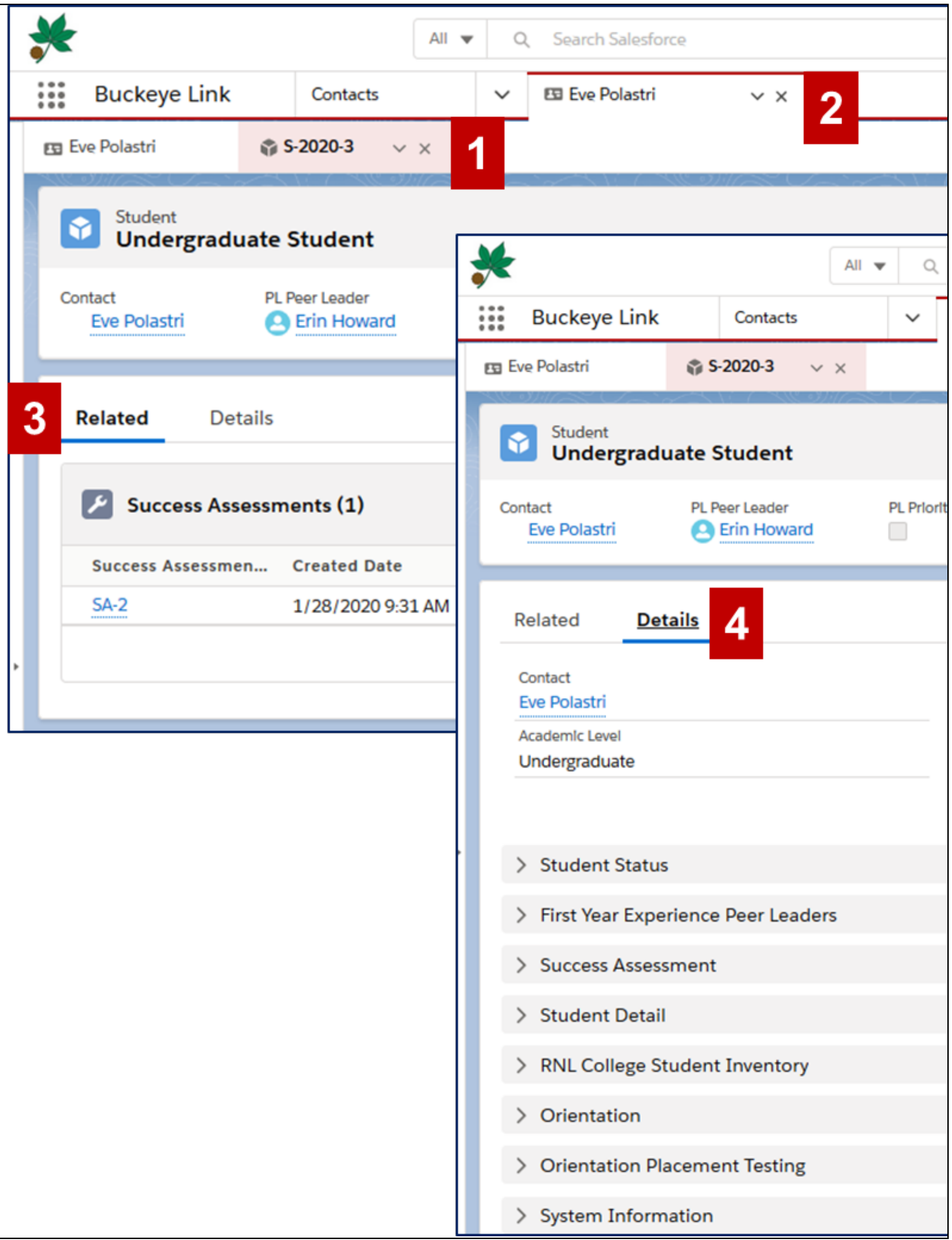


Student

Clicking on a Contact's Student Record link opens the Student Record **[1]** as a subtab of the Contact **[2]**

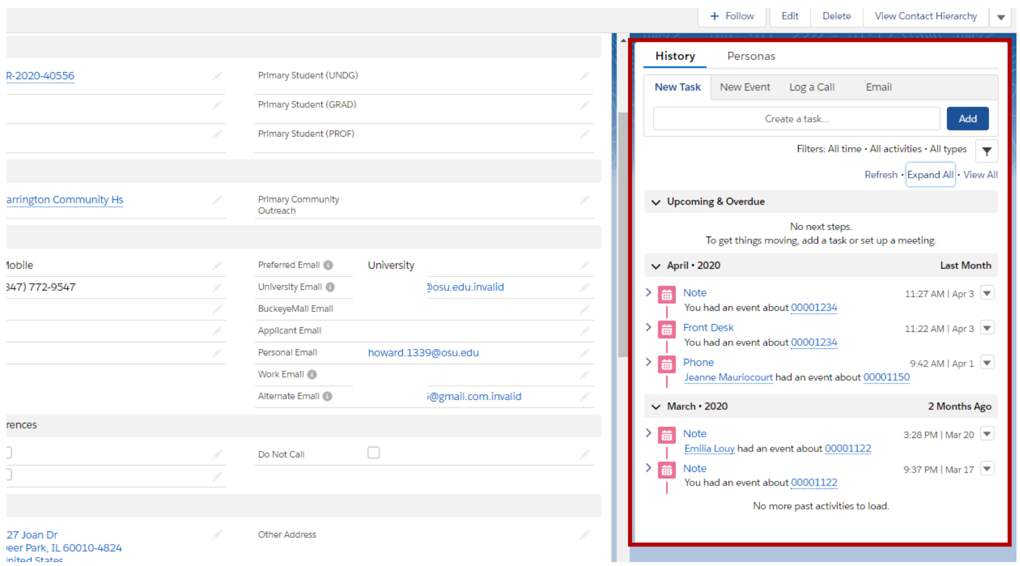
The Related tab **[3]** provides Success Assessment records

The Details tab **[4]** lists sections of data fields



History

The history section shows recent emails, events, notes, and interactions that have occurred for a particular contact.



Click on the Expand All/Collapse All to view the details of each activity.