

Buckeye Link New Contact Creation

Contact creation can be initiated from multiple places.

However, Buckeye Link counselors/mentors have access to a “New Contact” form in the Utility bar within Salesforce. This button is visible on any page.



History My Cases Chatter Feed Quick Entry + New Contact

Select the “New Contact” button and you will be brought to the Buckeye Link New Contact flow.

The contact creation form requires a **name** and **one** of the following to create a contact record:

- 1) Birthdate
- 2) Personal email
- 3) Mailing address

+ New Contact



Buckeye Link New Contact Flow

First Name

* Last Name

Preferred First Name

* Gender

--None--

Birthdate

Personal Email

you@example.com

Address

Address

Address

City

City

State/Province

State/Province

Zip/Postal Code

Zip/Postal Code

Country

Country

Save

Select next and you are asked if this contact is an undergraduate recruit.

Select "Yes" or "No."

+ New Contact



Buckeye Link New Contact Flow

*Is this contact an undergrad recruit?

☐ Yes

☐ No

Previous

Next

If yes, fill out the recruitment details.

You can leave any field blank on this page if you do not have enough information or if the question is not applicable.

Select next.

Buckeye Link New Contact Flow

* Inquiry Source

--None--



* Interest Term

--None--



* Interest Admit Type

--None--



* Interest Campus

--None--



* Interest Campus 2

--None--



* Interest Program

--None--



* Interest Plan

--None--



Previous

Next

If you filled out the undergraduate recruitment details, then you will be asked if you would like to affiliate an education institution.

Select “Yes” or “No.”

Buckeye Link New Contact Flow

Do you want to affiliate an educational institution to the contact?

- ☐ Yes
☐ No

Next

<p>If yes, look up the educational institution and indicate how the contact is affiliated with that institution. This institution will be the contact's primary affiliated institution by default.</p> <p>Select next.</p>	<div> <div>Buckeye Link New Contact Flow</div> <div>Look up the educational institution and indicate how the contact is affiliated.</div> <div> <div>Educational Institution</div> <div> <div>Search Accounts...</div> <div> <div>Start Date</div> <div> <div>End Date</div> <div> <div>* Role</div> <div>Student</div> </div> </div> </div> </div> <div> <div>* Role Status</div> <div>Current</div> </div> <div> <input checked="" type="checkbox"/> This is the contact's primary Institution and will be utilized to define the territory. </div> <div> <div>Previous</div> <div>Next</div> </div> </div> </div>
<p>Click finish to complete the record creation and the contact will now be stored in the Salesforce platform.</p>	<div> <div>Buckeye Link New Contact Flow</div> <div>Click finish to complete the record creation.</div> <div> <div>Finish</div> </div> </div>

What if the contact exists in SIS but not in Salesforce?	Create the contact in Salesforce and then navigate to the contact record. Edit the Ohio State ID field to add in the student's 9-digit OSU ID number.
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