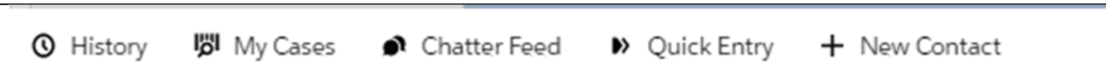
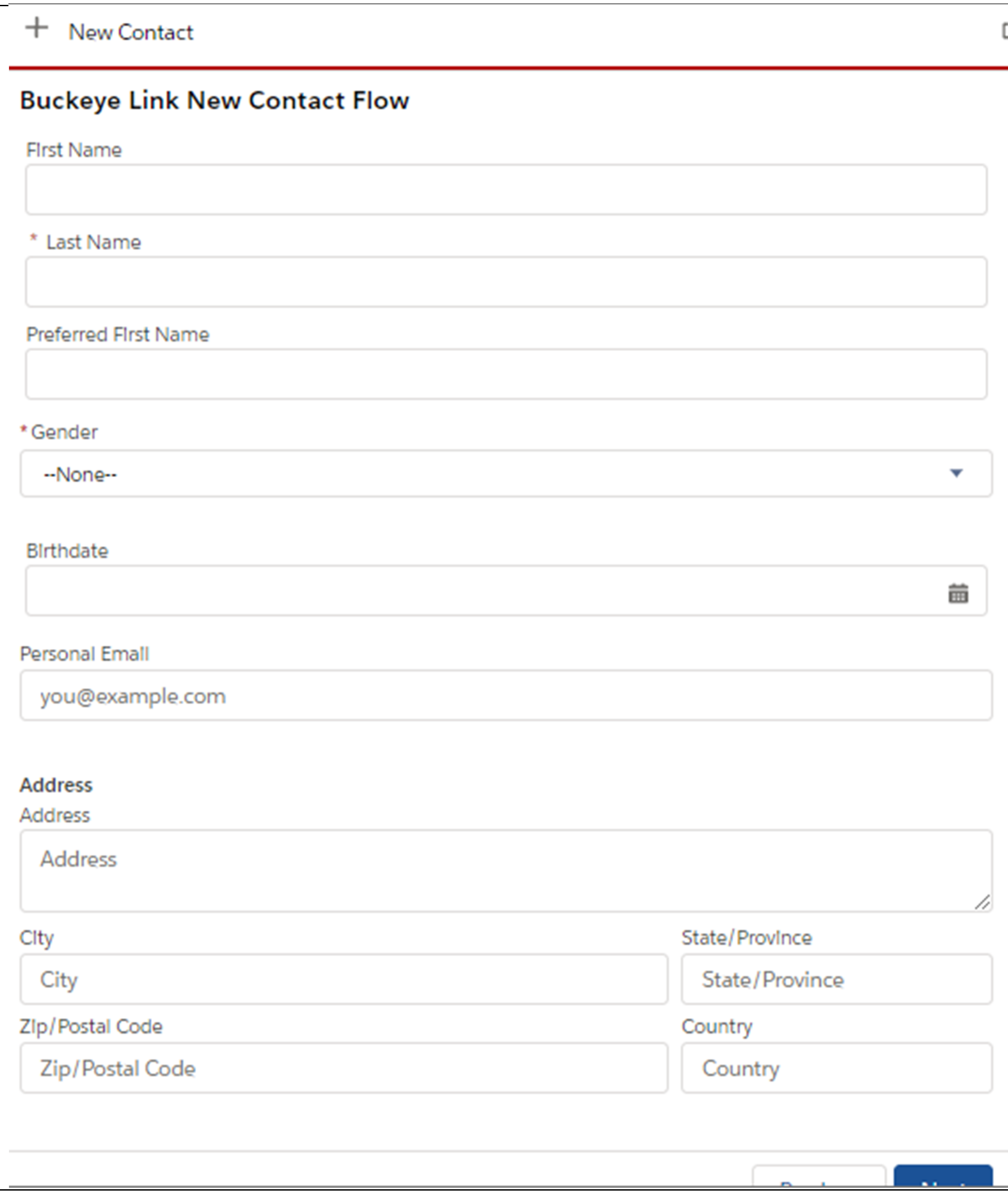
Buckeye Link New Contact Creation

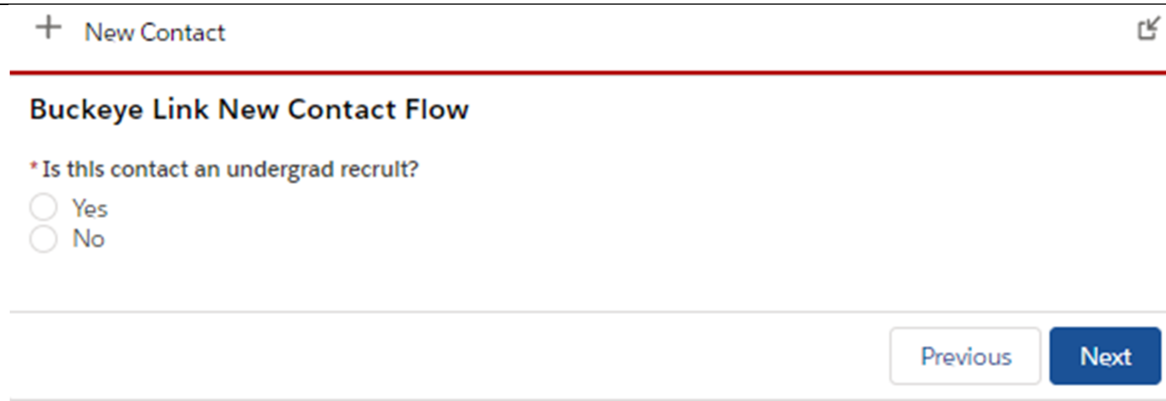
Contact creation can be initiated from multiple places. However, Buckeye Link counselors/mentors have access to a “New Contact” form in the Utility bar within Salesforce. This button is visible on any page.	

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

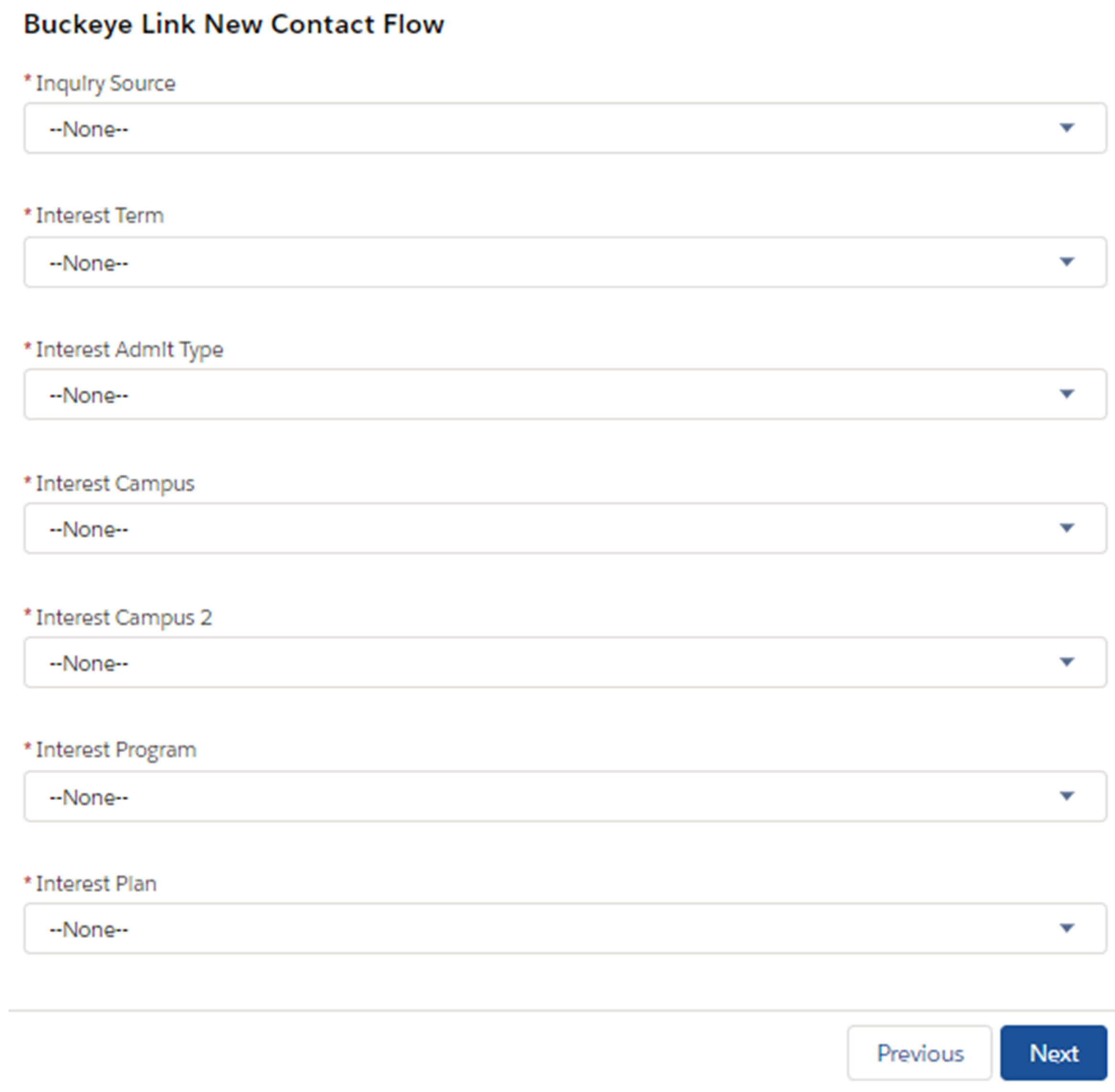


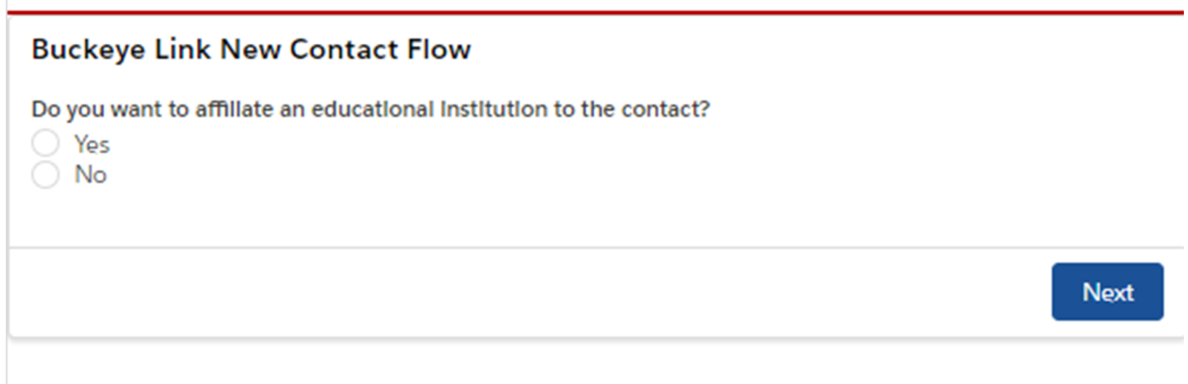
Select next and you are asked if this contact is an undergraduate recruit. Select “Yes” or “No.”	

If yes, fill out the recruitment details.

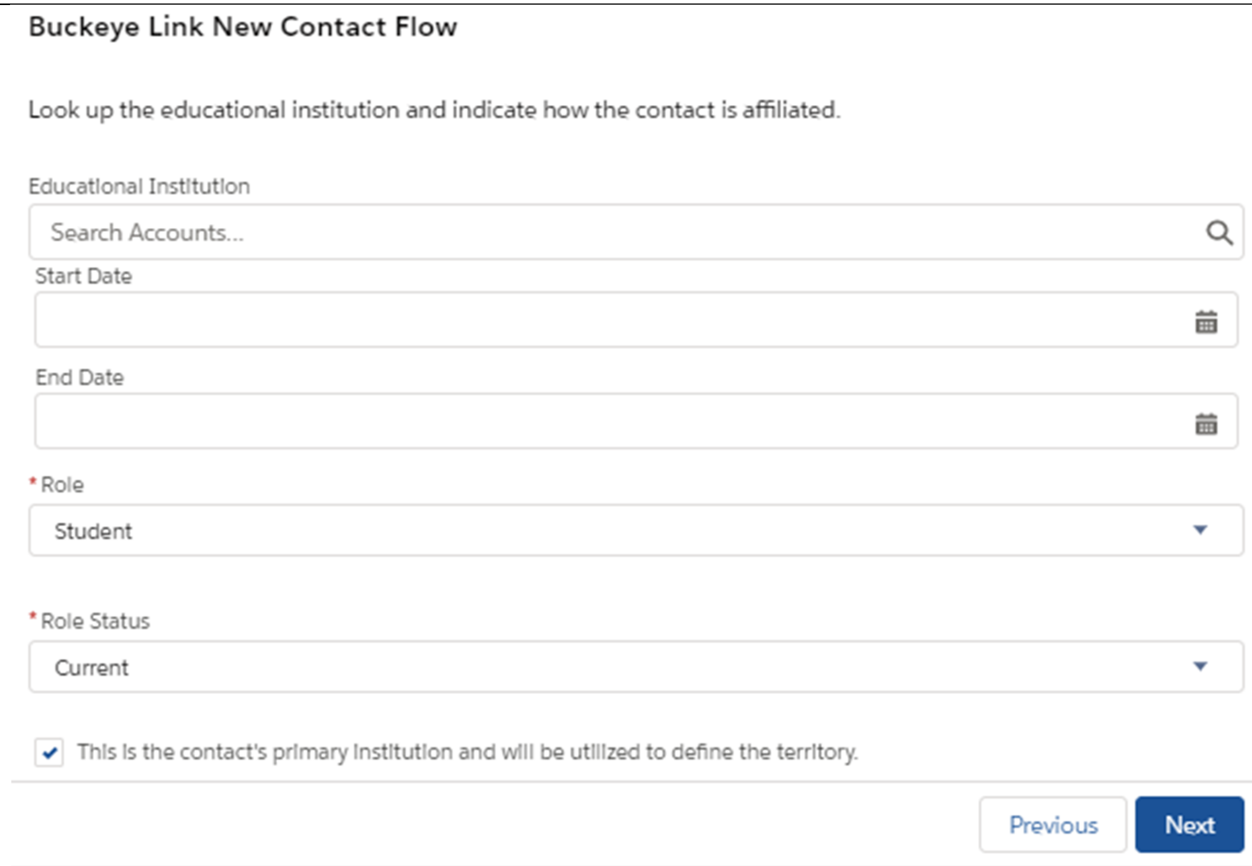
You can leave any field blank on this page if you do not have enough information or if the question is not applicable.

Select next.



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.”	

<table>
<tr>
<td>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.

Select next.</td>
<td>
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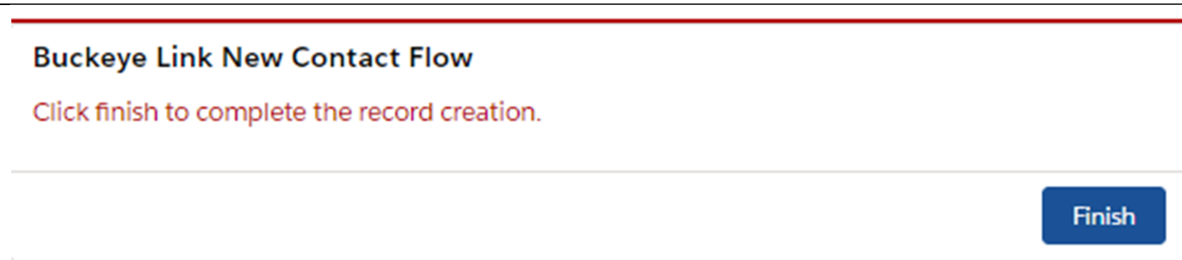
<tr>
<td>Click finish to complete the record creation and the contact will now be stored in the Salesforce platform.</td>
<td>
</td>
</tr>
</table>

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.