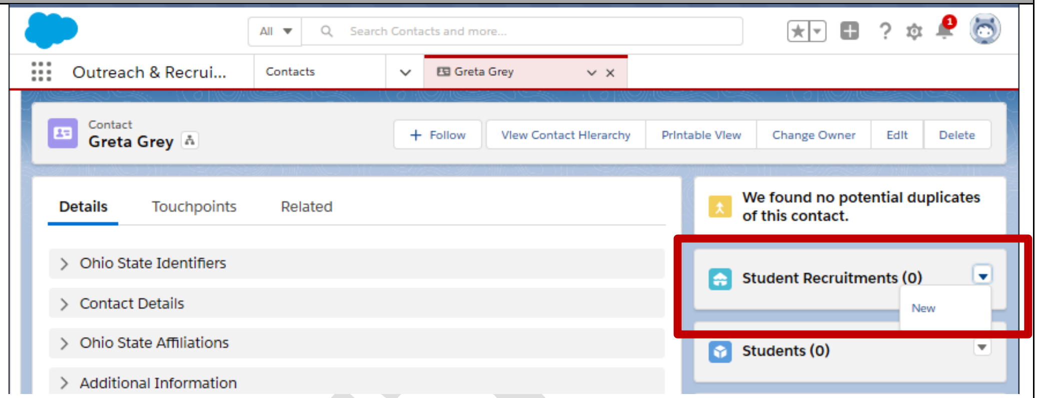
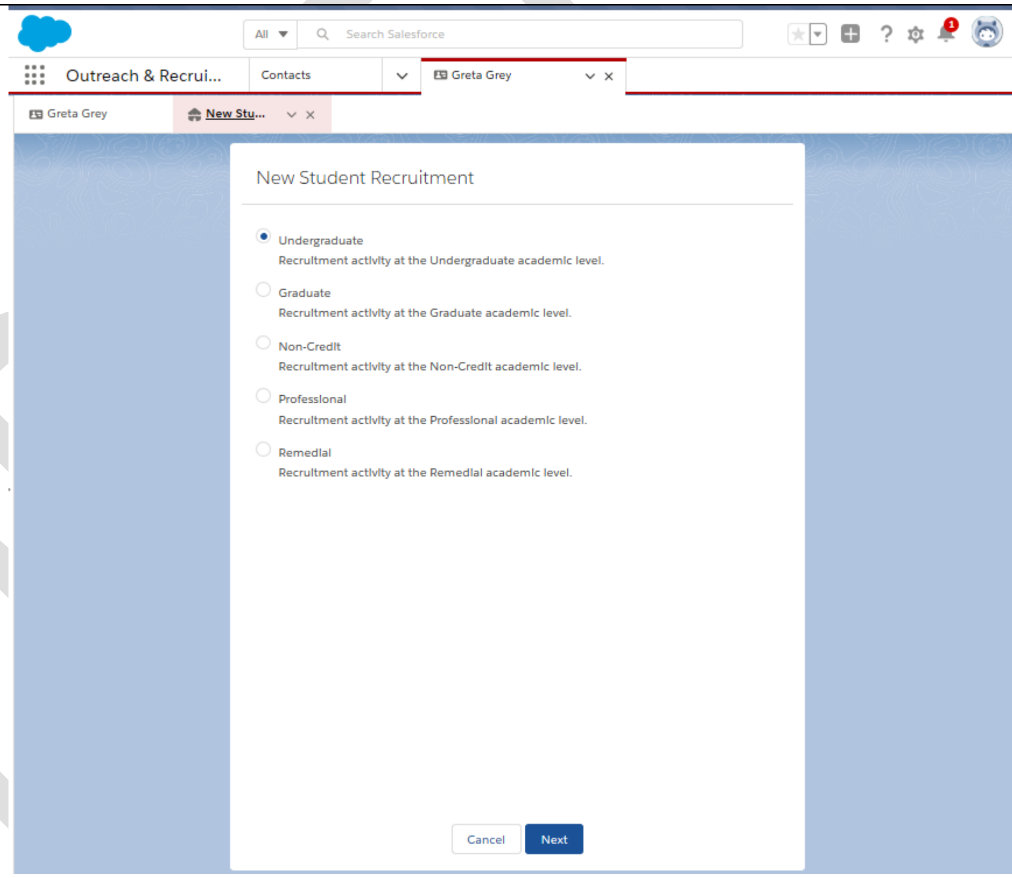
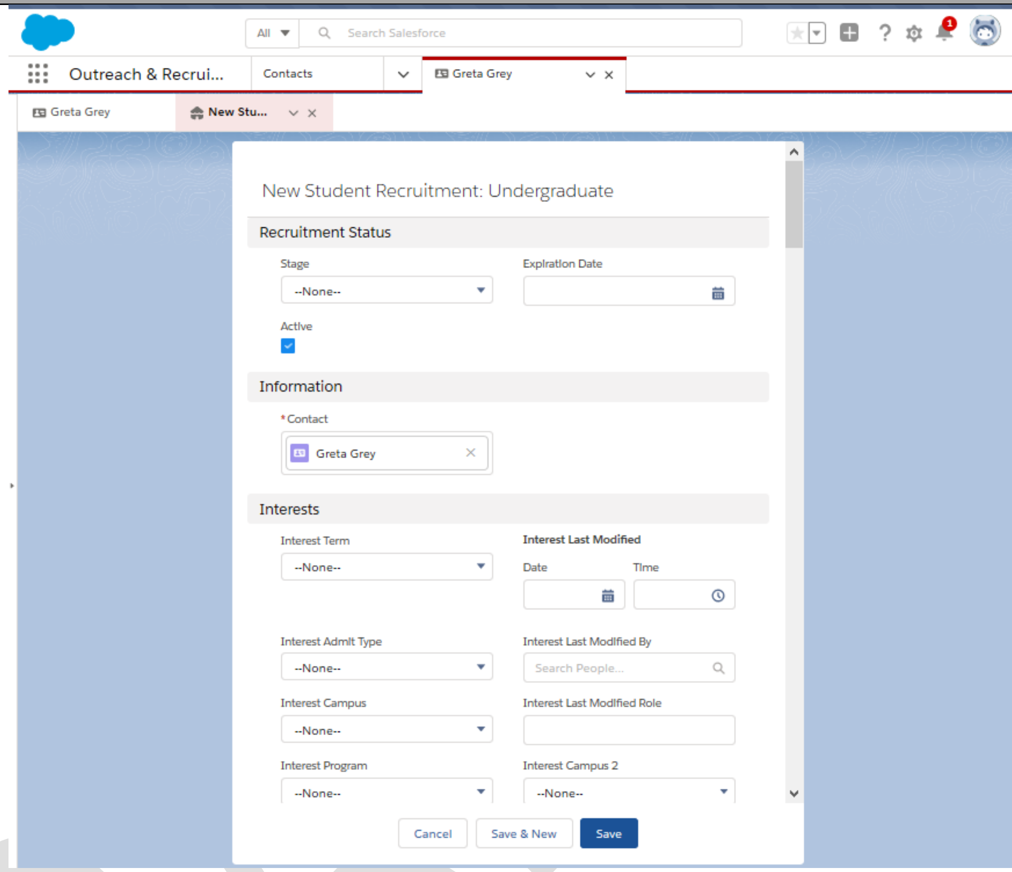
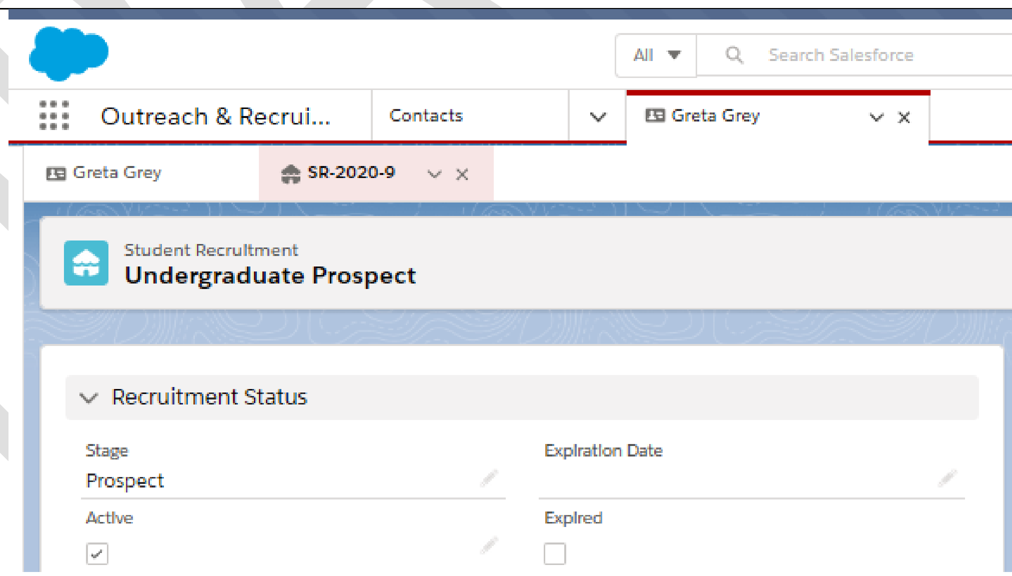
STUDENT RECRUITMENT RECORDS

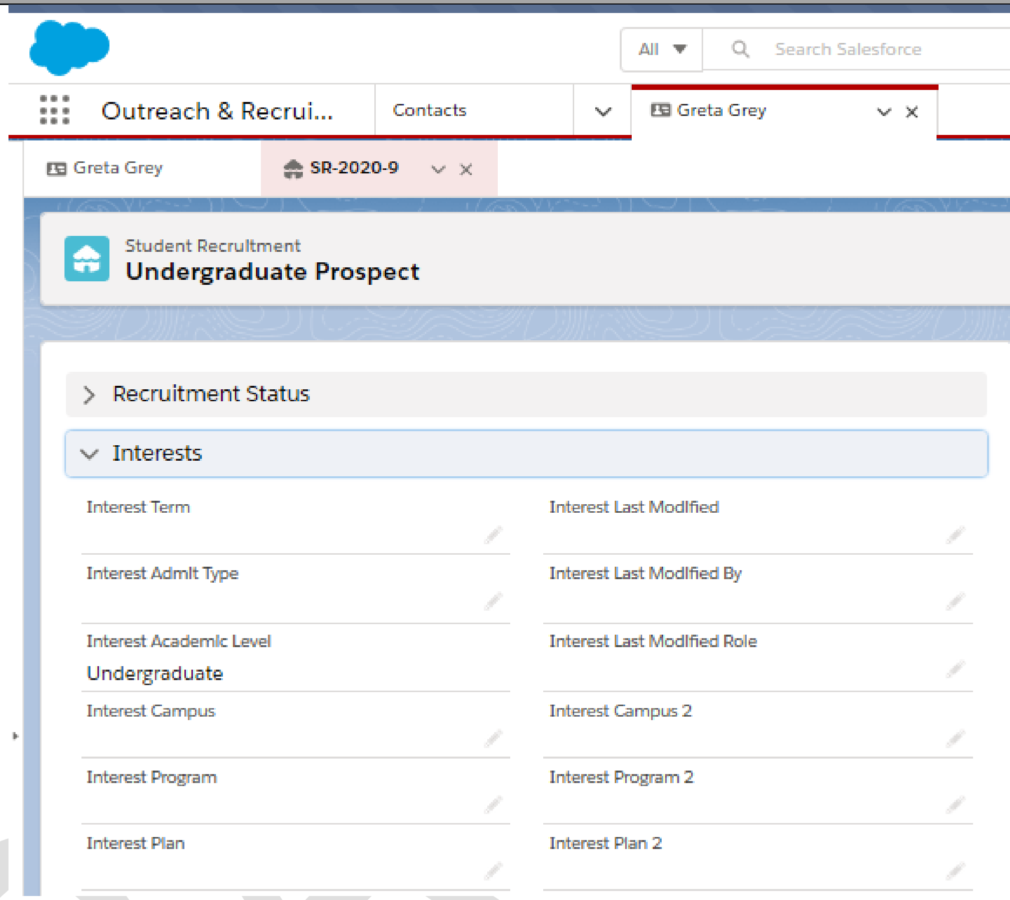
<table>
<tr><th>Step-by-Step</th><th>Screen</th></tr>
<tr><td>To manually add a Student Recruitment Record, locate the Contact Record

In the right pane, click the down arrow in the Student Recruitments section

Select New</td><td>
</td></tr>
<tr><td>Select the type of Student Recruitment

NOTE: Many of you will have Undergraduate as your default option and will not need to make a selection.</td><td>
</td></tr>
</table>

Step-by-Step	Screen
Because you added the Student Recruitment Record from the Contact Record, the Contact is automatically populated Enter as much information as is available **Note:** The majority of information that users referenced in Talisma will be stored under Student Recruitments. Sections of available fields, and the order of sections and fields, may differ by user group Click Save	
Section: Recruitment Status Stage: users can update; may also be updated by data imports Active: based on the interest term Expiration Date: will be set based on interest term Expired: the system will automatically check this box based on the Expiration Date	

Step-by-Step	Screen
Section: Interests Inbound data feeds, such as test score purchases and contacts added thru web form submissions, will update these fields Salesforce users can also update these fields Interest Academic Level displays the type of Student Recruitment you selected when creating the record The following fields are automatically updated by the system: • Interest Last Modified • Interest Last Modified • Interested Last Modified Role	
Section: Territory Details This section should be automatically populated through data imports that include the Contact's high school. Indicating that the Contact's high school is Primary is accomplished through the Affiliated Account Record. Interest Territory Manager has been added to allow regional users to manually add themselves as a contact if a student inquires or applies to that location but is not in that	

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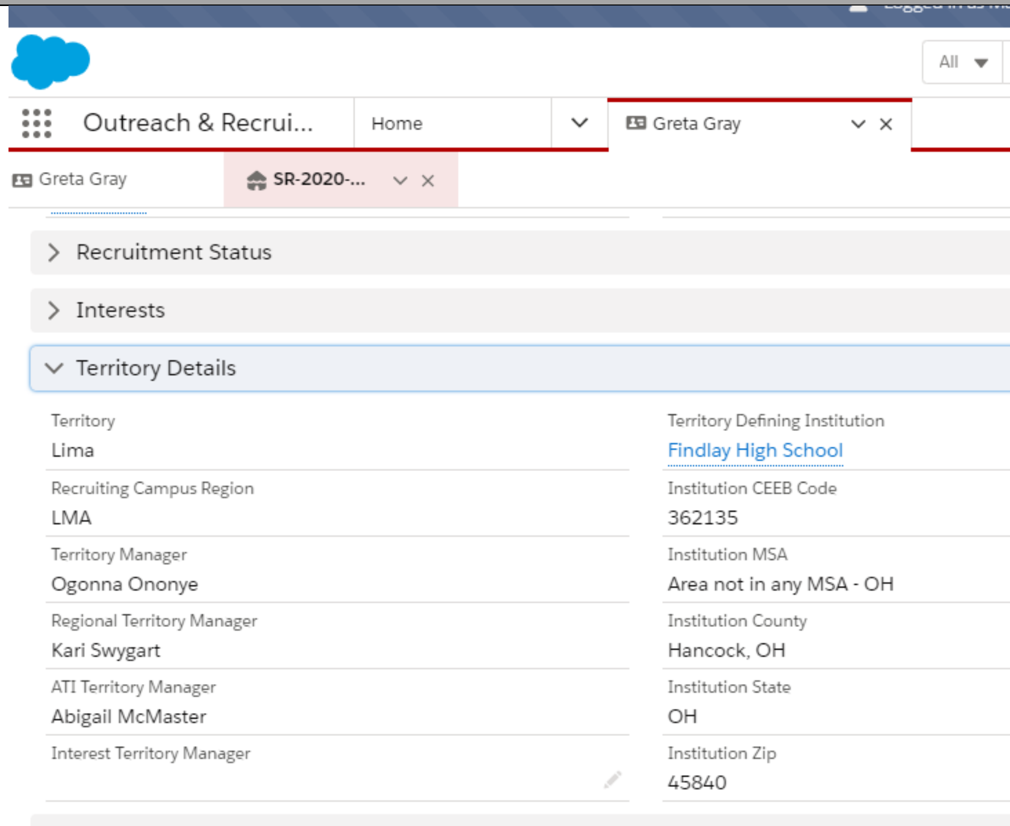
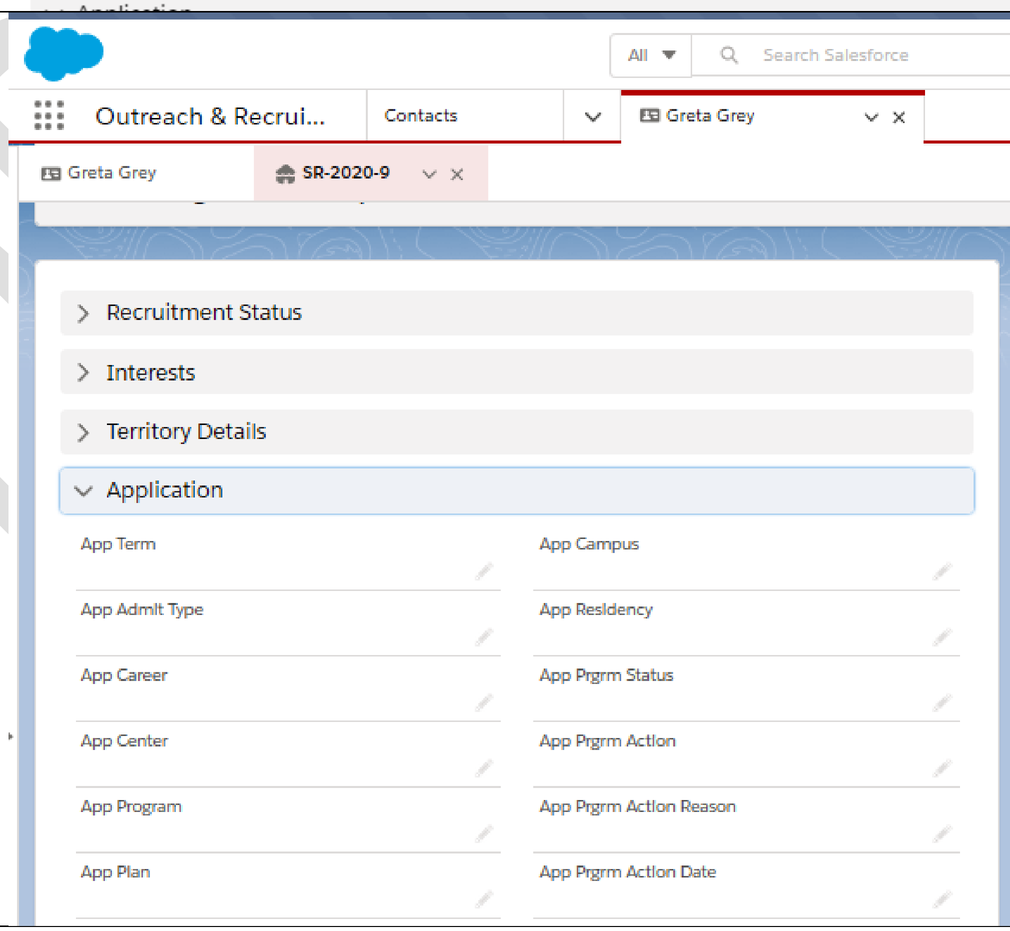
<tr><td>campus’s recruiting region.</td><td>
</td></tr>
<tr><td>Section: Application

The fields in this section will be automatically updated via an import of application data

Salesforce users will not update these fields</td><td>
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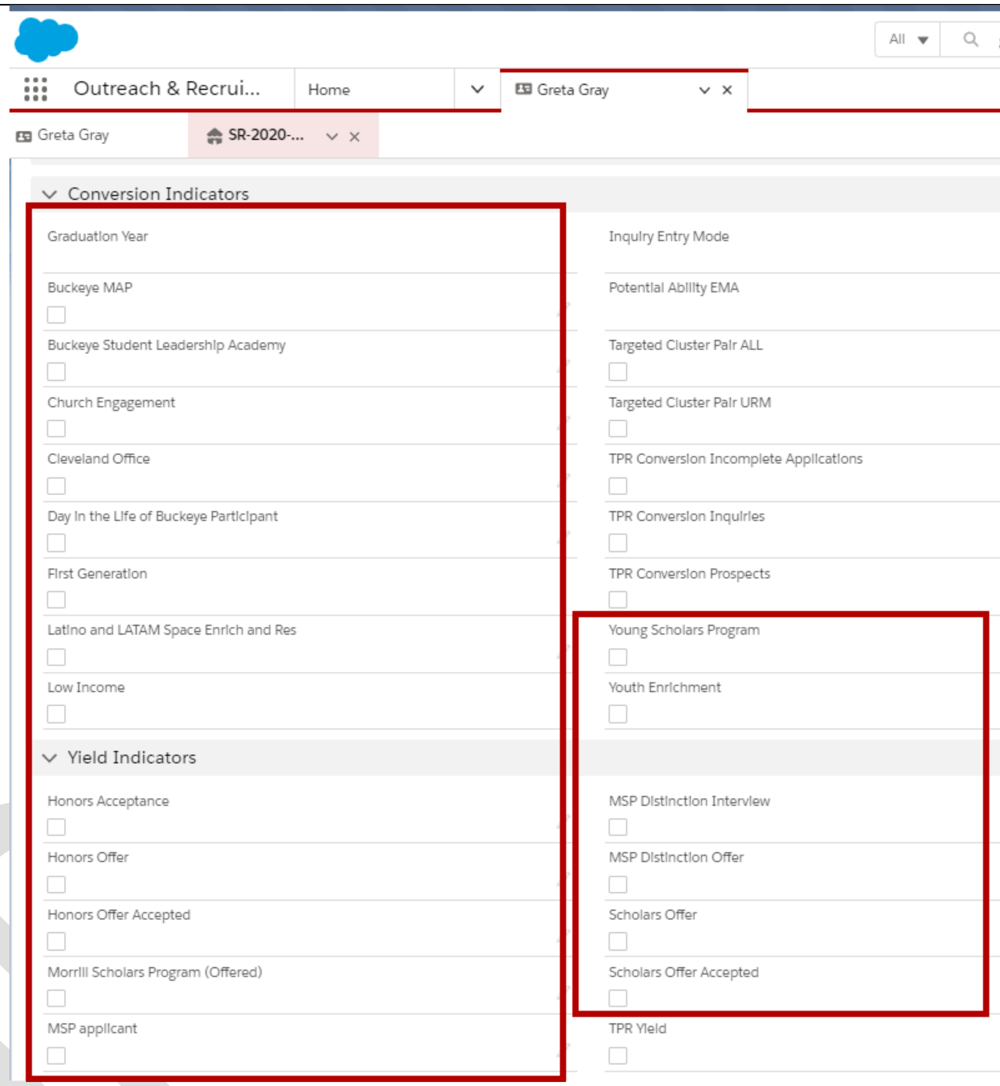
<tr><td></td><td></td></tr>
<tr><td>Sections: Conversion and Yield Indicators

Most fields can be manually updated.

First Generation and Low Income are marked based on test score purchases</td><td>
</td></tr>
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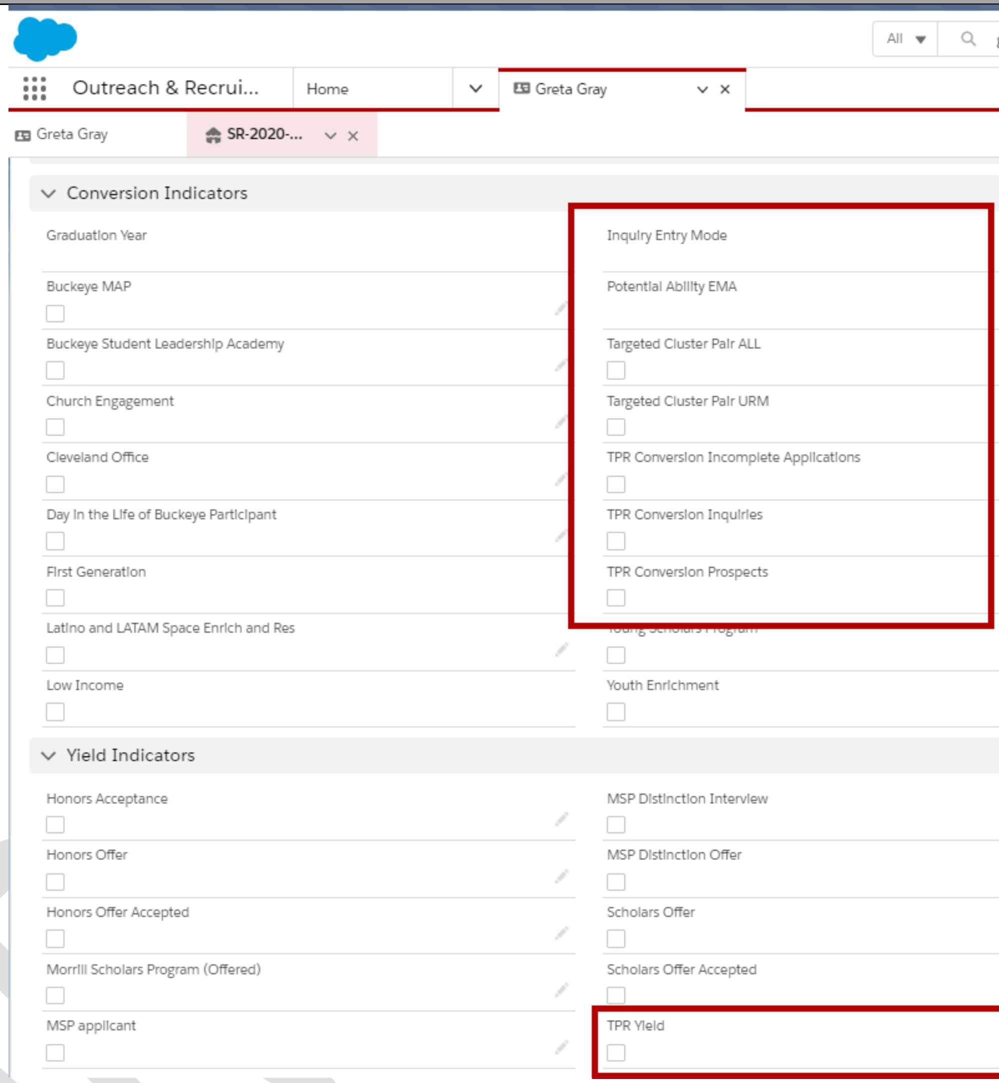
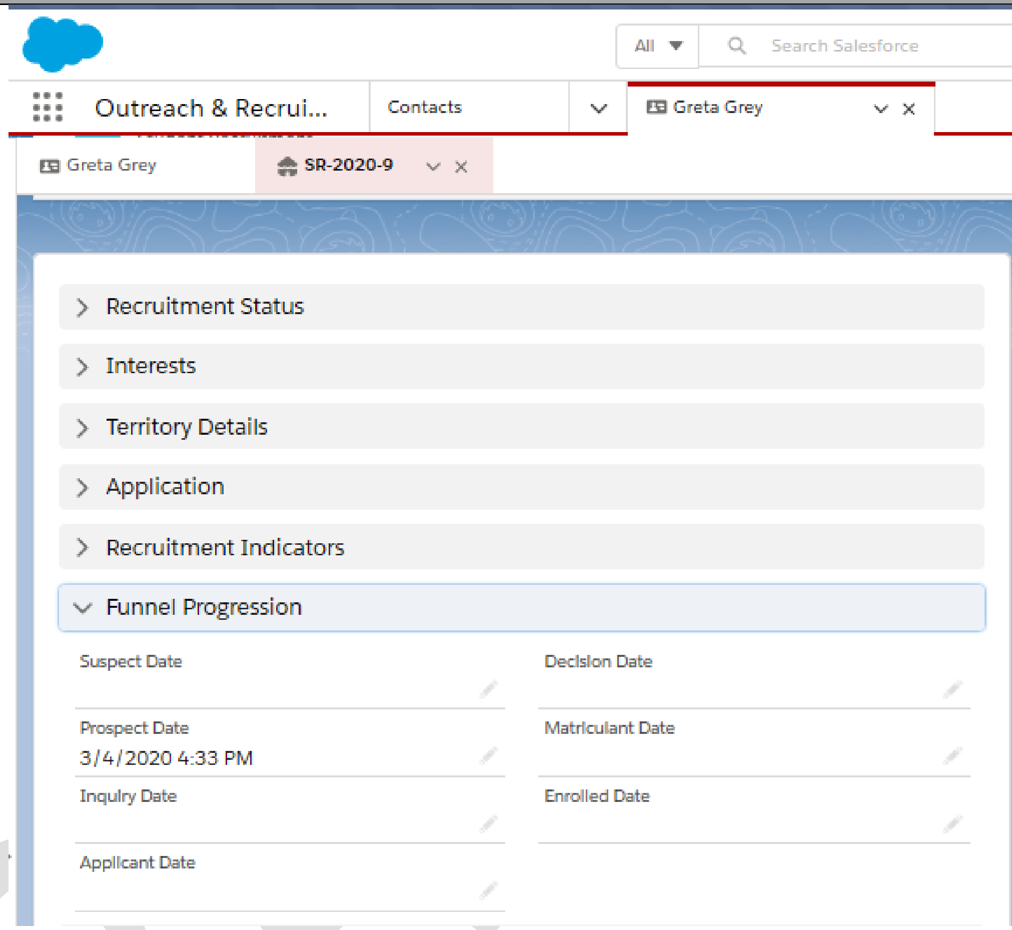
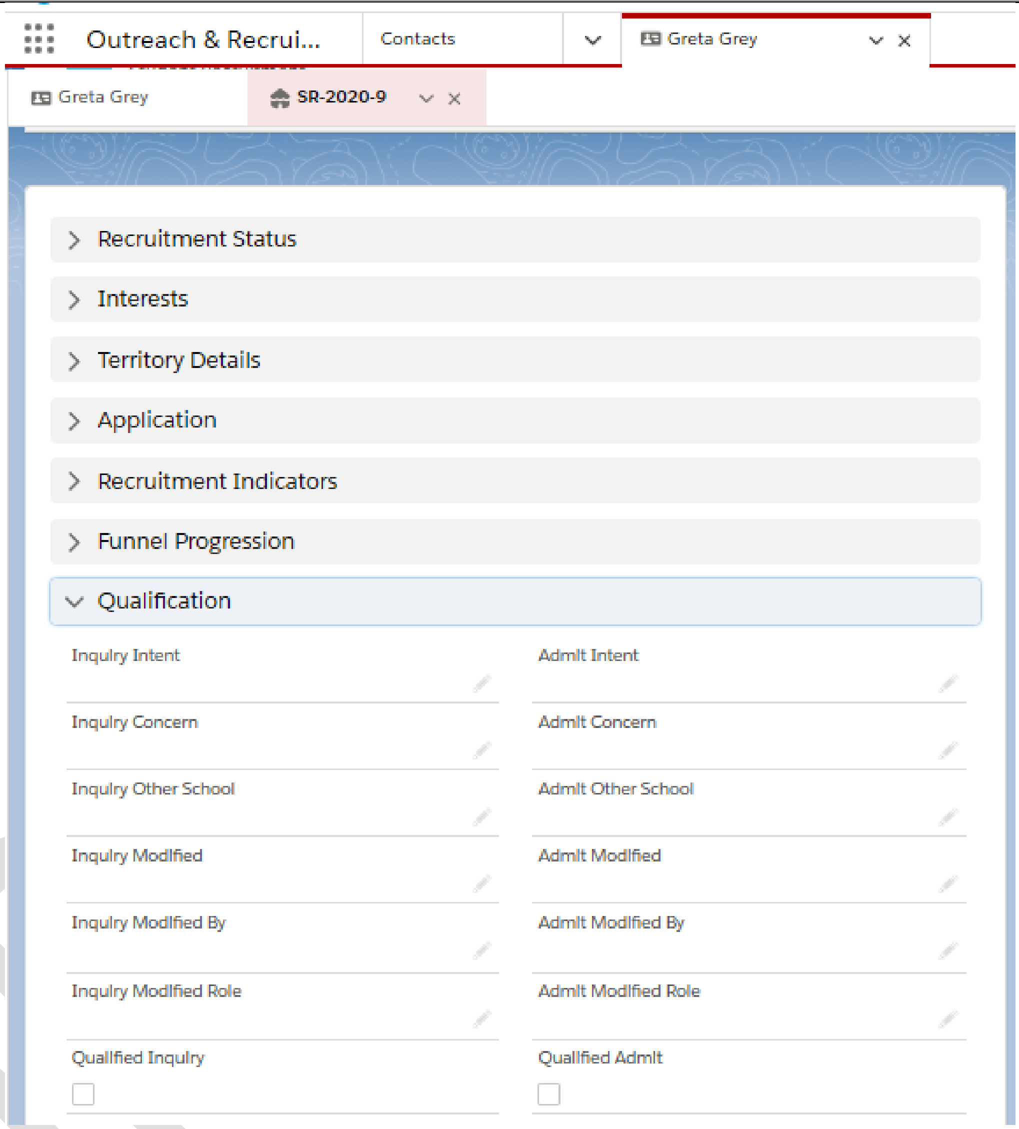
Step-by-Step	Screen
Sections: Conversion & Yield Indicators The following fields are imported from EMA: • Inquiry Entry Mode • Potential ability • Targeted Cluster Pair ALL • Targeted Cluster Pair URM • TPR Conversion Incomplete Applications • TPR Conversion Inquiries • TPR Conversion Prospects • TPR Yield	

Step-by-Step	Screen
Section: Funnel Progression The system will automatically set these fields based on entries in other sections	

Step-by-Step	Screen
Section: Qualification Users can update fields in this section, or use the guided flow options; see the Qualifying Recruits & Admits job aid	

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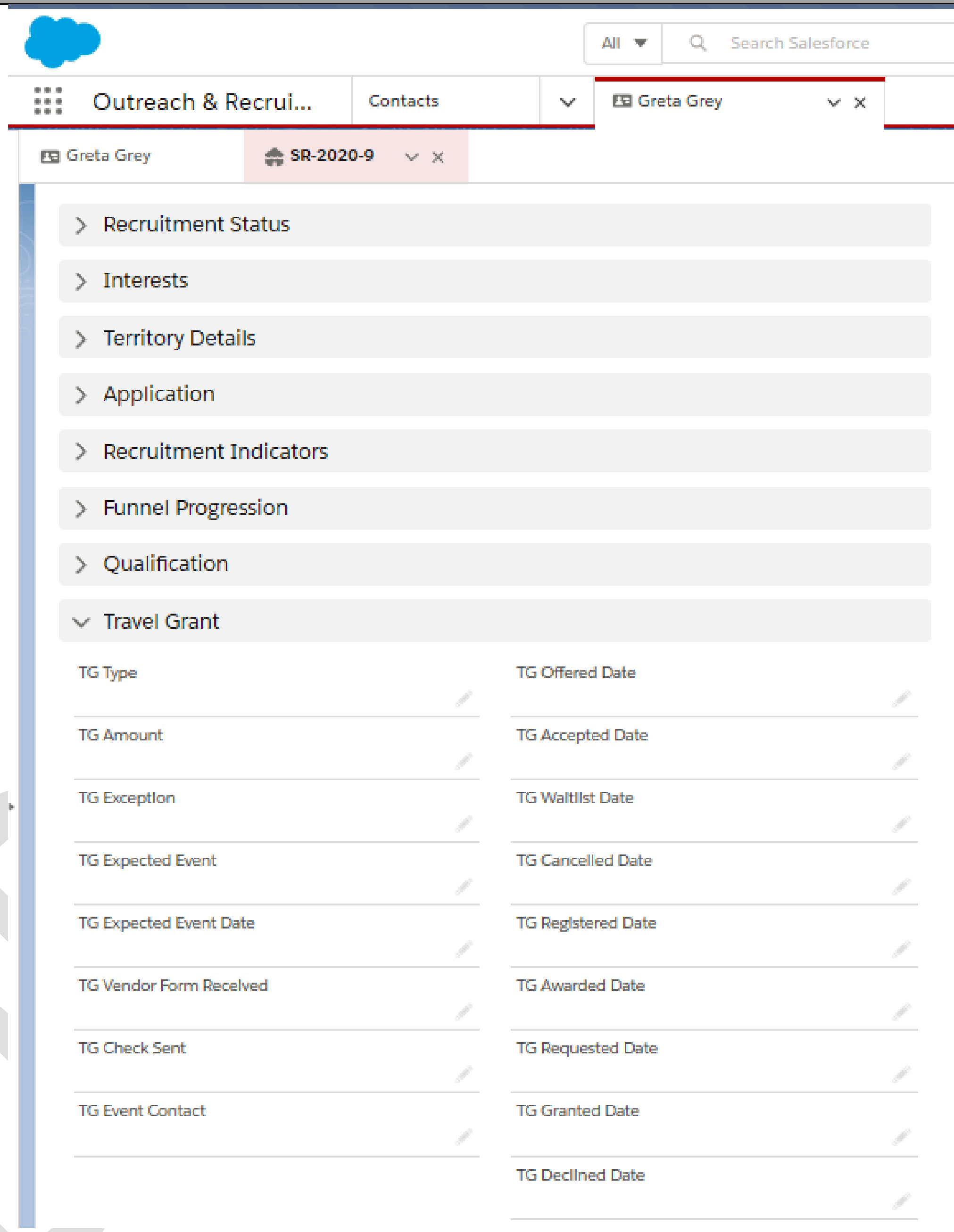
<tr><td>Section: Travel Grant

The system automatically sets the date fields based on updates made to the Travel Grant (TG) fields</td><td>
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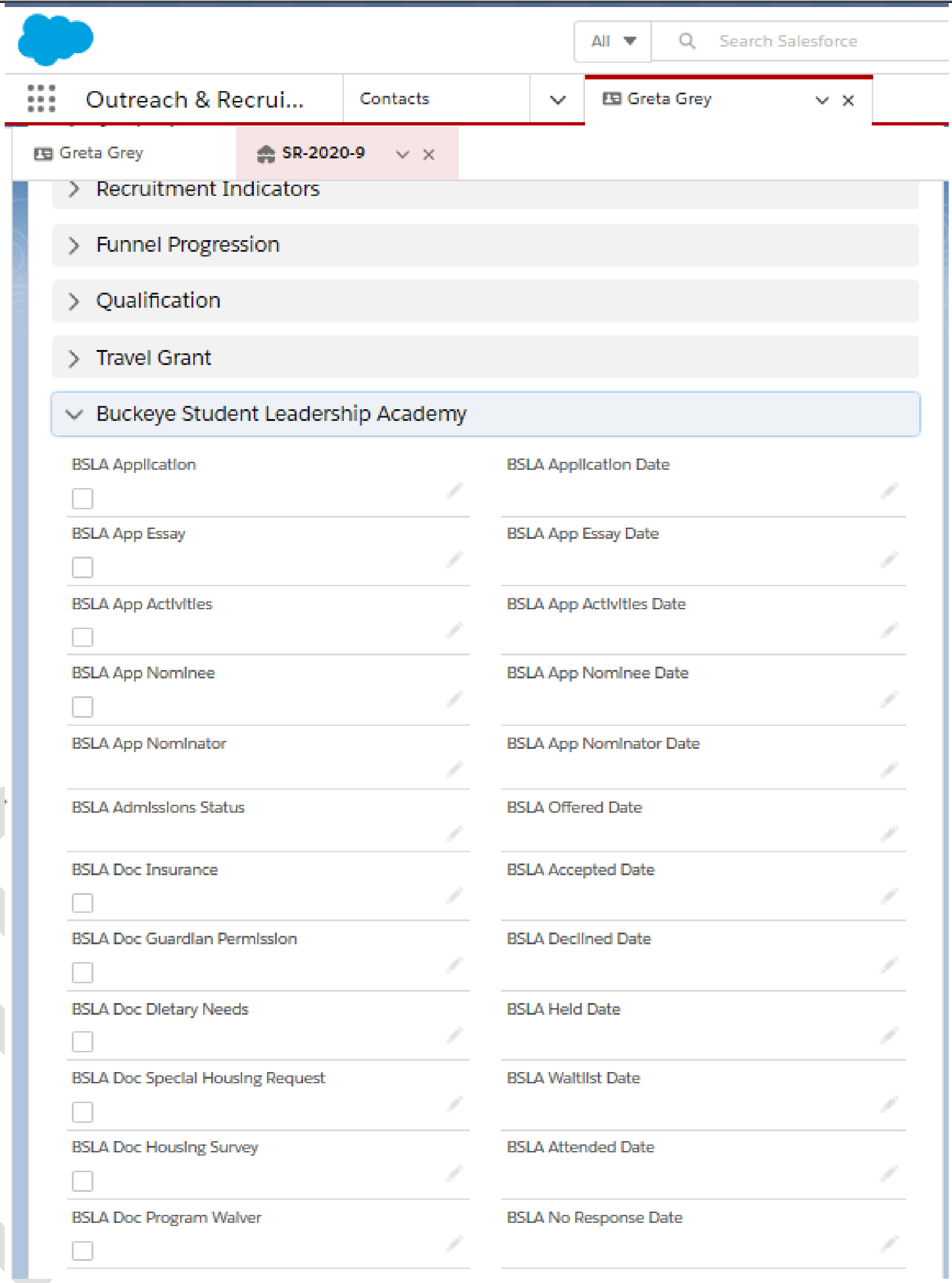
<tr><td>Section: Buckeye Student Leadership Academy

The system automatically sets the date fields based on updates made to the BSLA fields</td><td>
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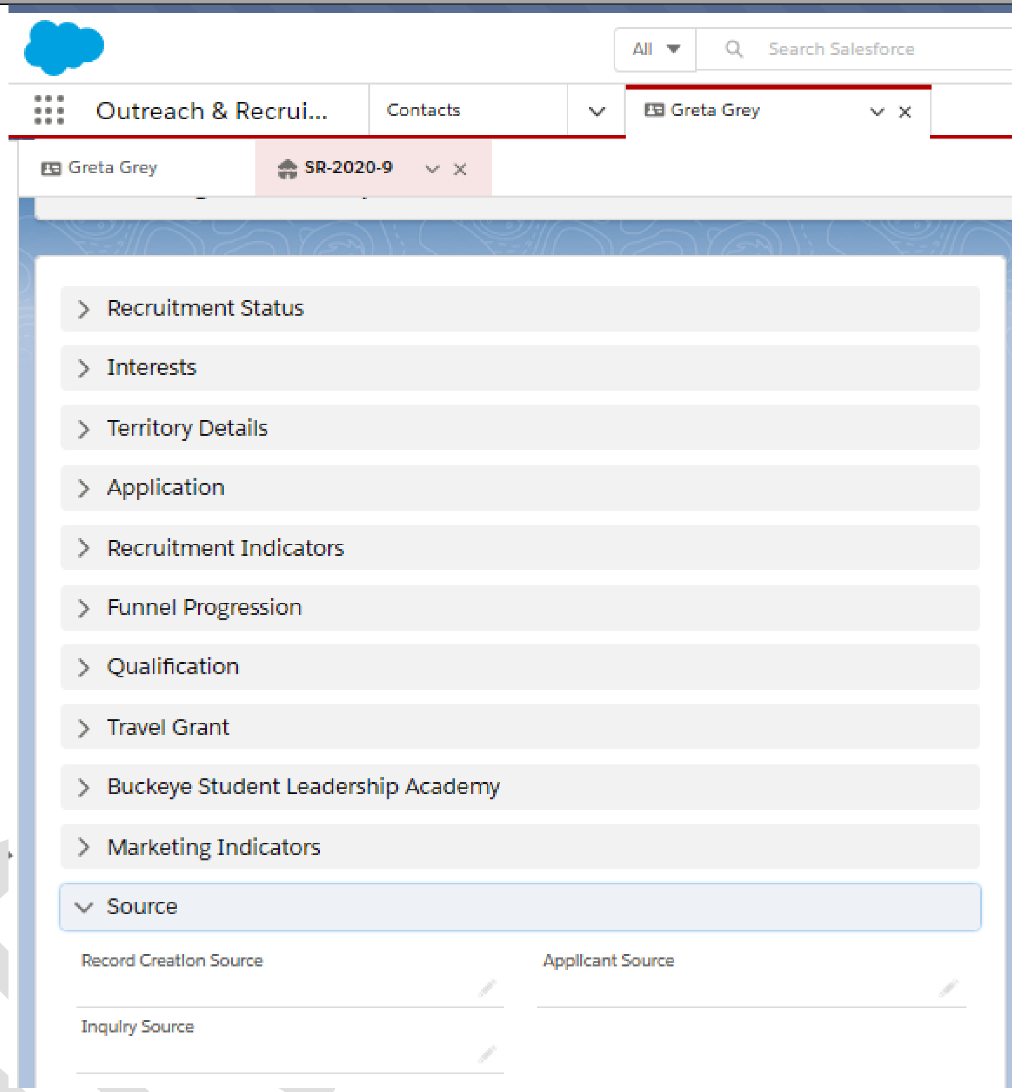
<tr><td>Section: Source

These fields are generally set by the system based on data imports</td><td>
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