

# CONTACT NAVIGATION

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

The screenshot displays a Salesforce contact record for John Samuel Podlesnik. The interface is divided into three main columns:

- Left Column (Contact Details):** Contains a sidebar with sections like 'Contact Details' (Name, Preferred First Name, Birthdate, Ohio State ID, Email, Phone) and 'Student Recruitment Details' (Stage Decision, App Campus, App Term, App Admit Type, App Program, App Plan, App Prgm Action, Interest Territory Manager).
- Middle Column (Details):** Features tabs for 'Details', 'Touchpoints', and 'Related'. The 'Details' tab is active, showing sections for 'Ohio State Identifiers', 'Contact Details', 'Ohio State Affiliations', 'Additional Information', and 'Contact Information'. Each section contains various fields with edit icons.
- Right Column (History/Personas):** Includes a 'History' tab with a 'New Task' button and filters. Below this is a 'Personas' section showing a list of recent activities (Notes, Phone calls) with dates and times.

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

This screenshot shows the 'Details' tab for a contact named Paul Hollywood. The 'Details' tab is highlighted with a red box. Below the tabs, there is a list of sections that can be expanded or collapsed:

- > Ohio State Identifiers
- > Contact Details
- > Ohio State Affiliations
- > Additional Information
- > Contact Information
- > Address Information
- > Primary Personas
- > Primary Affiliations

viewing additional fields [see next section for an example]

## 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

The screenshot shows the Salesforce interface for a contact named Paul Hollywood. The top navigation bar includes 'Buckeye Link', 'Contacts', and a dropdown menu for 'Paul Hollywood'. Below the navigation bar, there are tabs for 'Details', 'Touchpoints', and 'Related'. The 'Details' tab is active, and the 'Contact Details' section is expanded, showing a list of fields and their values. A red box highlights the expanded 'Contact Details' section.

Ohio State Identifiers	
Contact Details	
Name	Paul Hollywood
Birthdate	11/12/2002
Preferred First Name	
Social Security Number	
Account Name	Hollywood (Paul) Administrative Account
Email	fakeosubuckeye+paulhollywood@g...
Gender	Male
Phone	
FERPA	Deceased

Below the expanded section, there are three collapsed sections: 'Ohio State Affiliations', 'Additional Information', and 'Contact Information'.

## 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

The screenshot displays the Salesforce interface for a contact named Paul Hollywood. At the top, a red banner contains the message: **\*\*\* Attention: Refer to Staff \*\*\*** This person has been flagged for *Refer to Staff*. Please see the **Refer to Staff** section below for referral information.

The main content area is divided into three tabs: **Details**, **Touchpoints**, and **Related**. The **Details** tab is active, showing a list of sections: Ohio State Identifiers, Contact Details, Ohio State Affiliations, Additional Information, Contact Information, Address Information, Primary Personas, Primary Affiliations, Communication Preferences, and **Refer to Staff**. The **Refer to Staff** section is highlighted with a red box and contains the following fields:

Referral User	Referral Contact
<a href="#">Mercedes Counter</a>	
Referral Note	
Refer to Staff	
<input checked="" type="checkbox"/>	

On the right side of the interface, there are sections for **Student Recruitments** (showing an Undergraduate Inquiry) and **Students (0)**. At the bottom right, there are filters for 'All time', 'All activities', and 'All types', along with a 'Refresh' button and an 'Expand All' link.

## 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]

The screenshot shows the contact record for Scarlett Buckeye. The 'Touchpoints' tab is highlighted with a red box. Below the tab, there are three sections: 'Cases (1)', 'Cases Referenced On (1)', and 'Campaign History (1)'. Each section contains a table of data.

**Cases (1)**

Case	Subject	Status	Case Rec	Subcate	Owner	Date/Tin	Open
1	0000...	New	Buck...		Merc...	3/2/...	

**Cases Referenced On (1)**

Additio	Case Nt	Status	Primary	Type	Categor	Subcate	Case O	Case Dt	Time
1	ACC...	000...	Assi...	Paul...	ATI...		Mer...	2/1...	

**Campaign History (1)**

Campaign ...	Start Date	Type	Status	Responde
1	Erin - PL Camp...	Other	Sent	

## 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

The screenshot shows the Salesforce interface for a contact named 'Scarlett Buckeye'. The 'Touchpoints' tab is selected, and the 'Cases (1)' section is highlighted with a red box. The 'Cases (1)' table has the following data:

	Case	Subject	Status	Case Rec	Subcate	Owner	Date/Ti
1	<a href="#">0000...</a>	1	New	Buck...		Merc...	3/2/...

Below the 'Cases (1)' section is the 'Cases Referenced On (1)' section, which has the following data:

	Additio	Case Nt	Status	Primary	Type	Categor	Subcate	Case O	Case I
1	<a href="#">ACC...</a>	<a href="#">000...</a>	Assi...	Paul...	ATI...			Mer...	2/1...

Below the 'Cases Referenced On (1)' section is the 'Campaign History (1)' section, which has the following data:

	Campaign ...	Start Date	Type	Status
1	<a href="#">Erin - PL Camp...</a>		Other	Sent

## 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

Buckeye Link

Contacts

Scarlett Buckeye

Contact

Scarlett Buckeye

+ Follow

View Contact Hierarchy

Details

Touchpoints

Related

Cases (1)

New

Change C

1 Item • Sorted by Date/Time Opened • Updated a few seconds ago

	Case	Subject	Status	Case Rec	Subcate	Owner	Date/Ti
1	<a href="#">0000...</a>		New	Buck...		Merc...	3/2/...

View All

Cases Referenced On (1)

Add to Cam

1 Item • Updated a few seconds ago

	Addition	Case No	Status	Primary	Type	Categor	Subcate	Case On	Case I
1	<a href="#">ACC...</a>	<a href="#">000...</a>	1	Paul...	2			Merc...	2/1...

View All

Campaign History (1)

Add to Cam

1 Item • Sorted by Created Date • Updated a few seconds ago

	Campaign ...	Start Date	Type	Status
1	<a href="#">Erin - PL Camp...</a>		Other	Sent

<

5/2/20

Contact Navigation

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## 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

The screenshot shows the Salesforce interface for a contact named Scarlett Buckeye. The 'Touchpoints' tab is selected, and the 'Campaign History' section is highlighted with a red box. It shows one item: 'Erin - PL Camp...' with a status of 'Sent'.

Campaign	Start Date	Type	Status	Response
Erin - PL Camp...		Other	Sent	

## 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

The screenshot shows the Salesforce interface for the same contact, but with the 'Related' tab selected and highlighted with a red box. It displays three sections: 'Test Scores (0)', 'Relationships (1)', and 'Affiliated Accounts (1)'.

Relationship	Related Contact	Type	Status
Mother (Martha Buckeye)	Martha Buckeye	Mother	Current

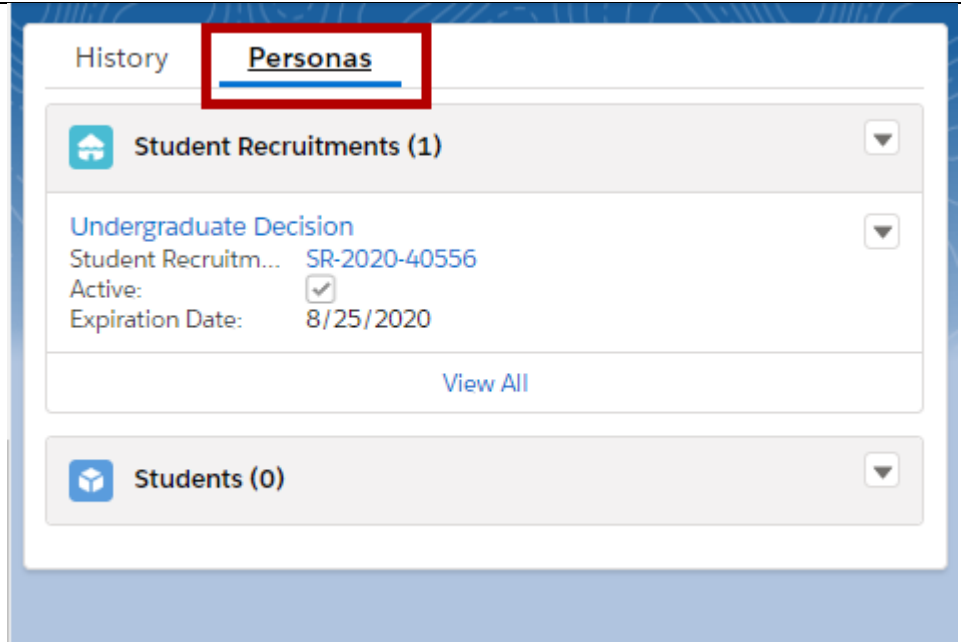
Affiliation Dis...	Organization	Affiliation Type	Role
Student at Wapakoneta Senior High School	Wapakoneta Seni...	Educational Instit...	Student

## 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.

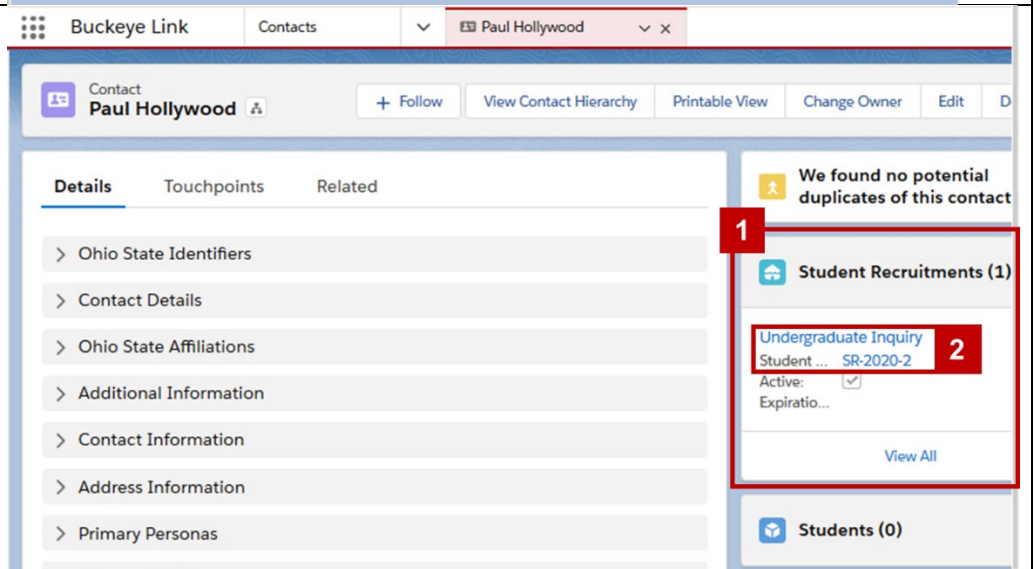


## Student Recruitment

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

The screenshot shows the Salesforce interface for a contact named Paul Hollywood. The top navigation bar includes the Salesforce logo, a search bar, and a user profile icon. The left sidebar shows the contact's record with a subtab for Student Recruitment. The main content area is titled 'Student Recruitment Undergraduate Inquiry' and contains three sections: Contact Details, Interest & Qualification History (2), and Student Recruitment History (6). The Contact Details section shows fields for Name, Title, Email, Account Name, and Phone. The Interest & Qualification History section shows a table with columns for Created, Updated In, Updated A, and User. The Student Recruitment History section shows a table with columns for Date, Field, User, Original Va, and New Value.

## 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

The screenshot shows the Salesforce interface for a contact named Paul Hollywood. The top navigation bar includes the Salesforce logo, a search bar, and a user profile icon. The left sidebar shows the contact's record with a subtab for Student Recruitment. The main content area is titled 'Student Recruitment Undergraduate Inquiry' and contains three sections: Contact Details, Interest & Qualification History (2), and Student Recruitment History (6). The Contact Details section shows fields for Name, Title, Email, Account Name, and Phone. The Interest & Qualification History section shows a table with columns for Created, Updated In, Updated A, and User. The Student Recruitment History section shows a table with columns for Date, Field, User, Original Va, and New Value.

## 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

The screenshot shows the Salesforce interface for a Contact record named "Eve Polastri". The left sidebar contains a list of tabs: Details, Touchpoints, and Related. The main content area displays the "Details" tab, which includes a list of sections: Ohio State Identifiers, Contact Details, Ohio State Affiliations, Additional Information, Contact Information, Address Information, Primary Personas, Primary Affiliations, Communication Preferences, Refer to Staff, and System Information. On the right side, there are two panels. The top panel, titled "We found no potential duplicates of this contact.", contains a section for "Student Recruitments (1)" with a dropdown menu showing "Undergraduate Matriculant" and details for "Student Re... SR-2020-3", including "Active: [checked]" and "Expiration ...". Below this is a "View All" link. The bottom panel, titled "Students (1)", is highlighted with a red box and shows a dropdown menu with "Undergraduate Student" and details for "Student Na... S-2020-3", including "Academic L... Undergraduate" and "Active: [checked]". A "View All" link is also present at the bottom of this panel.

## 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

The screenshot displays the Salesforce interface for a student record. At the top, there is a navigation bar with 'Buckeye Link' and 'Contacts' tabs. A search bar is present. The main content area shows the 'Student Undergraduate Student' record for Eve Polastri, with a 'PL Peer Leader' of Erin Howard. The 'Related' tab is selected, showing 'Success Assessments (1)'. The 'Details' tab is also visible, showing a list of sections including 'Student Status', 'First Year Experience Peer Leaders', 'Success Assessment', 'Student Detail', 'RNL College Student Inventory', 'Orientation', 'Orientation Placement Testing', and 'System Information'.

Success Assessment...	Created Date
<a href="#">SA-2</a>	1/28/2020 9:31 AM

Related **Details**

Contact [Eve Polastri](#)

Academic Level Undergraduate

- > Student Status
- > First Year Experience Peer Leaders
- > Success Assessment
- > Student Detail
- > RNL College Student Inventory
- > Orientation
- > Orientation Placement Testing
- > System Information

## 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.

The main contact history page displays a list of activities for a contact. The activities are organized into sections: 'Primary Student (UNDG)', 'Primary Student (GRAD)', 'Primary Student (PROF)', 'Primary Community Outreach', 'Mobile', 'Preferred Email', 'University', 'University Email', 'BuckeyeMail Email', 'Applicant Email', 'Personal Email', 'Work Email', 'Alternate Email', 'References', 'Do Not Call', and 'Other Address'. A sidebar on the right shows a detailed history view for a specific contact, including a 'New Task' button, filters, and a list of activities categorized by month (April 2020, March 2020).

The detailed history view for a specific contact shows a list of activities categorized by month (April 2020, March 2020). Each activity is expandable, showing details such as 'Assigned To', 'Related To', and 'Description'. The 'Expand All' button is highlighted with a red box. The activities listed are: 'Note' (You had an event about 00001234), 'Front Desk' (You had an event about 00001234), and 'Phone' (Jeanne Mauriocourt had an event about 00001150).