**Visitdays-Salesforce Integration:**

**Step1:** Download the CSV file from SFTP

**Step2:** Delete the following columns from the original table

* Phone Blacklisted
* Address Verified
* County
* Latitude
* Longitude
* Role
* Current School Name
* Enrollment Term
* Enrollment Year
  + Change this to “HS\_Grad\_Year\_\_c”
  + DO NOT DELETE
* Year\_c
  + THIS COLUMN NEEDS TO BE ADDED
* Academic Interests
  + Need to delimit this field. First two majors will be taken, the others will be discarded.
    - Names of the two major columns:
      * Major\_of\_Interest\_\_c
      * Secondary\_Major\_of\_Interest\_\_c
* Enrollment Status
* Visit ID
* Start
* End
* TZID
* Event Type ID Event Type Name
* Families Can Schedule
* Groups Can Schedule
* Description
* Capacity
* Seats Taken
* Max Guests
* Location ID
* Location Name
* Is On Campus
* Visit Status
* Schedule By Threshold Days
* Schedule By Threshold Include Weekends
* Uservisit Id
* Registered At
* Registration Type
* Registration Status
* Is Registered
* Checked In
* No Show
* Num Guests
* Rescheduled

**Step3: Check if any of the emails are duplicates, if so delete all except the one with the most information**

* **For VisitDays, the duplicates usually have the exact same information**

**Step 4: Make all the first name, last names, and Street Addresses proper**

* **Example: asare -> Asare**
* **Example: 3691 monarch circle -> 3691 Monarch Circle**

**Step 5: Create Concat ID**

* **Concatenate the first name & the last name & the first 10 digits of the street address**

**Step 6: Create two columns for Major\_of\_Interest\_\_c and Secondary\_Major\_of\_Interest\_\_c**

* **This is going to be the tricky part to automate**
* **The students top two majors will be recorded here**
  + **Must delimit the “Academic Interests” slot according to the semicolons and then enter the top two choices in the new created columns**
* **Use the Academic Major database to replace the UK Major choice with the available UK sources**
  + **If unable to find a correlating choice in the Academic Major database, then manually insert the best major manually based off the student’s selection**

**Step 7: Use the “Title” section in order to figure out if the student is a Transfer**

* **If the student is a transfer, then change the Student\_Type\_\_c to “Transfer”**
* **If the student isn’t a transfer, then change Student\_Type\_\_c to “Freshman”**
* **Delete the “Title” Section afterwards**

**Step 8: Predup using additional files**

* **UK 20-21 Marketing Pop**
* **20-21 Transfer Pop**
* **20-21 EAB Marketing Pop**
* **20-23 Prospects (no comm owner)**

**Step 9: Predup using SAP Applicant file**

* **Record the student numbers from the matches found**
* **Will later be used to update the records already in SF database**

**Step 10: Insert the now pre-dup’d records into the final spreadsheet**

**Step 11: Mapping**

| **Original** | **Final** | **Salesforce (RFI\_Form\_\_c)** |
| --- | --- | --- |
| **Visitor Id** | **PURCHASE\_ID\_\_C** | **Purchase\_ID\_\_c** |
| **N/A - Always insert “VisitDays” for each record** | **SOURCE\_\_C** | **Source\_\_c** |
| **Always today’s date** | **LOAD\_DATE\_\_C** | **Load\_Date\_\_c** |
| **First Name** | **FIRST\_NAME\_\_C** | **First\_Name\_\_c** |
| **Last Name** | **LAST\_NAME\_\_C** | **Last\_Name\_\_c** |
| **Email** | **EMAIL\_\_C** | **Email\_\_c** |
| **First Name + Last Name + first 10 digits of address** | **CONCATID\_\_C** | **ConcatID\_\_c** |
| **Street Address** | **ADDRESS\_LINE\_1\_\_C** | **Address\_Line\_1\_\_c** |
| **Street Address 2** | **ADDRESS\_LINE\_2\_\_C** | **Address\_Line\_2\_\_c** |
| **City** | **CITY\_\_C** | **City\_\_c** |
| **State** | **STATE\_\_C** | **State\_\_c** |
| **Zipcode** | **ZIP\_CODE\_\_C** | **Zip\_Code\_\_c** |
| **Phone** | **MOBILE\_\_C** | **Mobile\_\_c** |
| **Enrollment Year** | **HS\_GRADUATION\_YEAR\_\_C** | **HS\_Graduation\_Year\_\_c** |
| **High School CEEB Code** | **HS\_CEEB\_CODE\_\_C** | **HS\_CEEB\_Code\_\_c** |
| **ADD ONE YEAR TO “HS\_GRADUATION\_YEAR”** | **YEAR\_\_C** | **Year\_\_c** |
| **Always ‘Fall’** | **TERM\_\_C** | **Term\_\_c** |
| **Always ‘Prospect’** | **STUDENT\_STATUS\_\_C** | **Student\_Status\_\_c** |
| **If the contents of the“Title” column have the word ‘Transfer’ then it’s a transfer student. Else, it’s a Freshman** | **STUDENT\_TYPE\_\_C** | **Student\_Type\_\_c** |
| **Academic Interests - Whatever major is before the first semicolon** | **MAJOR\_OF\_INTEREST\_\_C** | **Major\_of\_Interest\_\_c** |
| **Academic Interests - Whatever major is after the first semicolon** | **SECONDARY\_MAJOR\_OF\_INTEREST\_\_C** | **Secondary\_Major\_of\_Interest\_\_c** |
| **Country**  **Must replace all ‘United States’ with ‘US’** | **COUNTRY\_\_C** | **Country\_\_c** |