

Welcome to Salesforce Recruitment & Case Management Training

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Introduction

Salesforce is a cloud-based system which users can integrate their business processes allowing automated functionality. This functionality can assist in reducing workloads and enabling an increased focus on customer service. It provides a central location to manage student prospects and all communication to and from the student.

Why Salesforce?

ASU is implementing Salesforce across the university to:

- Deliver information that is student-centric.
- Answer student's most frequently asked questions.

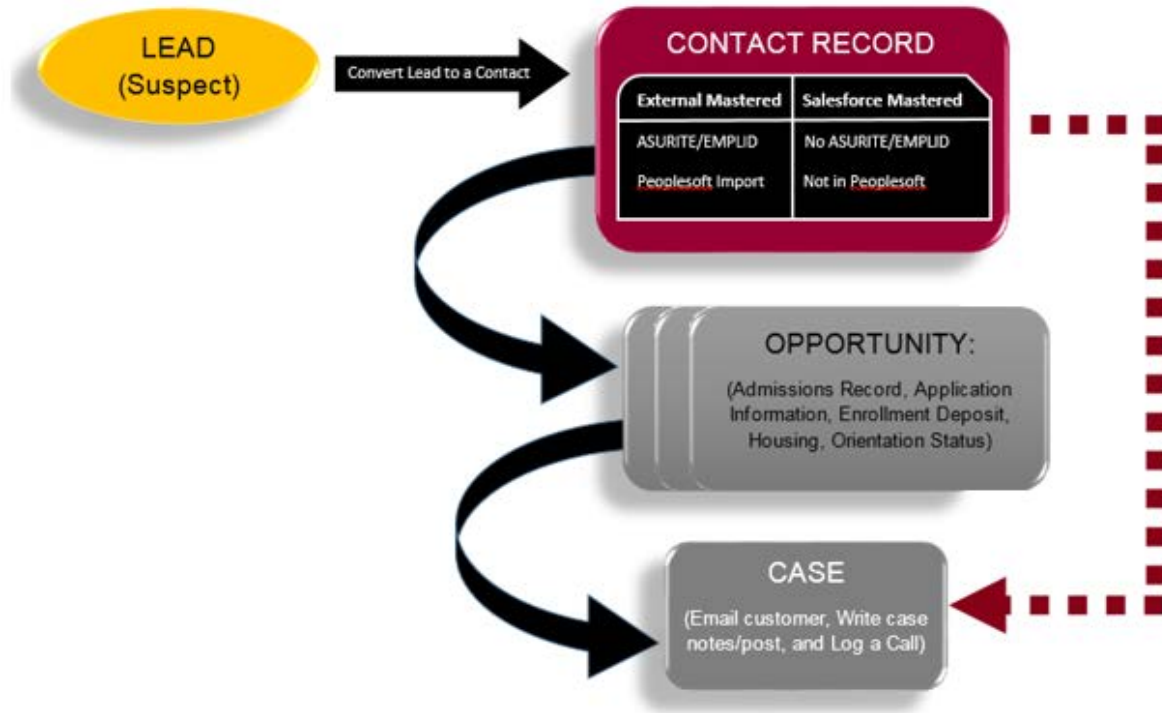
- Ensure students have a consistent and positive service experience.

Key Terms

The following are some terms you will hear referenced frequently throughout this document.

Terms	Definition
Lead	A lead is a prospective student that has been acquired through a purchased list or similar means. This person has shown an interest in attending college but has not contacted ASU. (Suspect)
Contact	<p>A <i>Contact</i> is a person who has a relationship with ASU. (Prospect (Applicant/Admitted or Bi-Demo Information)</p> <p>A <i>Contact Record</i> contains demographic information, case history, and other related data on the prospective student and is created by:</p> <ul style="list-style-type: none"> • Nightly PeopleSoft Import • Prospect imports (including: web form submissions, event registrations and test score submissions) • New Prospect manual data entry
Opportunity	Opportunity is the recruitment record with the term, type (First Time Freshman, Transfer) and stage (Prospect through Enrollee) of the student. The record includes application information and critical enrollment actions like housing, deposit, and orientation.
Case	A case record is where student communication is received and responded. Case is also where web form submissions and all student service issues are managed.
Stage	The stage is the status of an Opportunity. As the application is submitted and processed, the stage will be updated through the PeopleSoft import.
Functional Group	The Functional Group is a department or college.
Category	The Category is a team or service category within a given Functional Group.
Sub-category	The Sub-category is a sub-team or area of focus within a team.
Case List	<p>The Case List is the collection of Cases that are assigned to a unique Functional Group.</p> <ul style="list-style-type: none"> • All Open – Lists all the open cases for your Functional Group and owned by you • Closed – Lists all the closed cases for your Functional Group and owned by you. • My Open Cases – Are Cases that are only owned by you. • Department - Lists cases owned by your functional group and category
Object	An object is a specific type of information you can store in Salesforce. For example, the Contact object allows you to store demographic information about students who have completed an admissions application. For each object, your organization will have multiple, specific records.

Overview of the Recruitment Life Cycle



Contact	Opportunity
Name, Email, Address, Phone, Birthday	Type, Entry Term, Stage
Deceased	Application Information (Program, Plan)
Email Opt Out, Do Not Call	Qualifiers
Parent Email	International Student
Event Attendance	UCAP Registration
Interests	Military Status (self-reported)
Scholarships	First Generation
Source List	Enrollment Deposit, Housing, Orientation
Marketing/Communication Campaigns	Math Placement Test Score
Previous Education	MMR on File
Test Scores	CI Score
	Barrett Application Details
	Transfer Pathway Details
	Recruitment Call

Leads

A Lead record is a prospective student who has not made contact with ASU. Their information was acquired through a purchased list such as the GRE testing site, TOEFL testing site, or the National Name Exchange. A Lead has not contacted ASU nor completed an Admissions Application. Leads are imported by the Salesforce Recruiting Support team. Mass communication campaigns are sent by the Enrollment Services Communication department to provide information about ASU and its programs.

Contact Records

A Contact record contains information about a person who has a relationship with ASU. This person may be a perspective student, a student applicant, a student, an alumnus, an employee, or a courtesy affiliate. There are two types of Contact records: Salesforce Mastered and External Mastered. Salesforce Mastered Contact records exist only in Salesforce. Information has been acquired from the prospective student contacting ASU. They do not have a previous relationship with ASU. External Mastered Contact records have been imported from PeopleSoft.

Contact Sally Student

Show Feed

Cases [1] | Contact Opportunities [1] | Lead Interests [1] | Open Silverpop Email Activities [5+] | Campaign History [5+] | Previous Education

Contact Detail Edit Delete Sharing

Name Sally Student

Middle Name

Suffix

CAP Possible

Self-Service PIN 960,016

PIN lockout

▼ Contact Details

Do Not Call

Mobile

Phone (623) 555-1212

Work Phone

▼ Address Information

Mailing Address 111 E. North Drive
Tempe, Arizona 85287
United States

Contact Tami Test Test

Show Feed

Cases [0] | Student Groups [5+] | Service Indicators [1] | Contact Opportunities [0] | Open Activities [0] | Activity History [0] | HTML Email Status [0] | Notes & Attachments

Contact Detail Edit Delete Sharing

Name Tami Test Test

Middle Name

Suffix

EMPLID 1204230295

ASURITE ID ttest10

CAP

CAP Possible

SEED

SEED Eligible

Thunderbird Teach-out

▼ Contact Details

Contact Preference

Home Phone

Work Phone

Mobile

Local Phone

▼ Address Information

Mailing Address Do not send
tempe, Arizona 85287
United States

The main differences between the two record types are that the **External Mastered Contact** record will have an **EMPLID** and an **ASURITE**. Many of the fields are not editable on an External Mastered Contact record because the data can only be updated within PeopleSoft.

Opportunities

When a prospective student contacts ASU, an Opportunity record is created. Prospect records can be manually created using a data entry or created through an import such as the submission of a web form, event attendance, or test list. Once the prospective student submits an Admissions Application, more information will be viewable. (Application Information; Enrollment Deposit, Housing, and Orientation status)

Opportunities have the following stages:

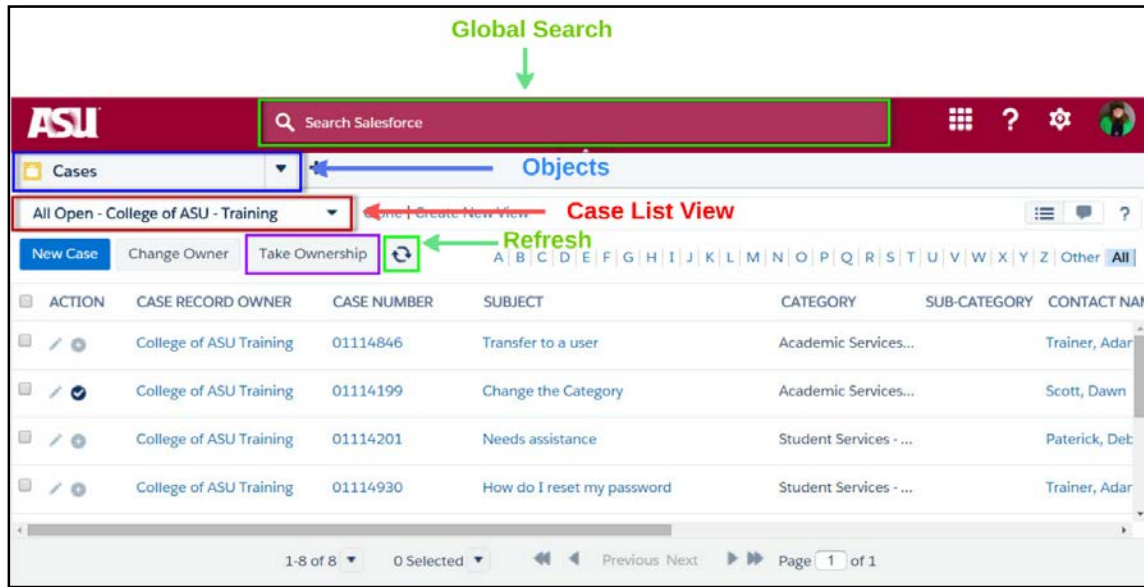
GRAD APP STATUSES	UNDERGRAD APP STAGES
Prospect	Prospect
Applicant - Incomplete	Applicant - Incomplete
Applicant - International Review	Applicant - In Evaluation
Applicant - Low English Proficiency	Applicant - Individual Review
Applicant - Pending Letters of Rec	Applicant - Post-Eval Info Required
Applicant - In Committee	Applicant - College Review
Applicant - In Review	Applicant - Withdrawn
Applicant - Ineligible	Admitted
Applicant - Deferred Decision	Admitted – Conditional
Admitted	Admitted - College Review
Admitted – Conditional	Enrolled
Admitted – Leave of Absence	Denied
Admitted – Deferred	Withdrawn
Enrolled	
Denied	
Withdrawn	
Discontinued	

An Opportunity will list a specific term, type and stage. An opportunity with an application will have additional app information. Most of the fields are not editable on an application record because the data source is PeopleSoft. An application can only be managed inside PeopleSoft.

Graduate Recruitment can have multiple opportunities for each program/college the student shows interest in. If the student shows interest in a different plan, please create a new opportunity as applicable. It is not necessary to create a new Prospect application if one exists already.

Undergrad Recruitment, you can update the term and interest on a prospects opportunity. It is best to update this record as you communicate with the prospective student. If they show interest in a different term or plan, please be sure to modify this record as applicable. It is not necessary to create a new Prospect application if one exists already.

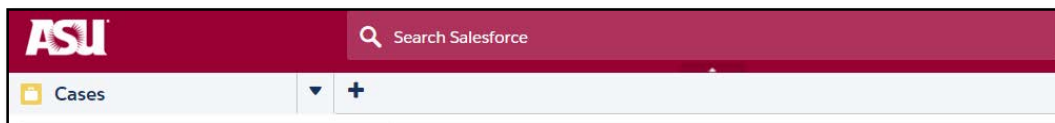
Service Console



Prospective Student Records

The following steps and process will be the same for entering New Prospect information, including Contact Cards and Events.

To search for a specific student within ASU Connections, you can use the **Global Search** box at the top of the service console.



You can search by first/last name, phone number, email address, or street address.

1. Use the asterisk (*) as a wildcard function will allow you to search more records. If you start with the asterisk, then the search will look for records that contain the phrase.



2. If you end the phrase with an asterisk, then it will search for records that start with that phrase. Always perform a search before entering any new records.



Search Results for Prospective Student

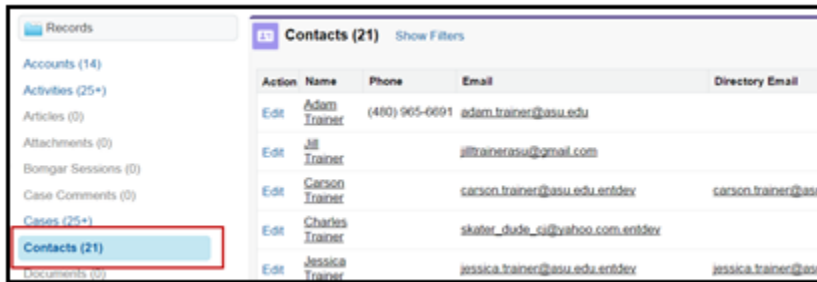
When entering a new opportunity into Salesforce, it is best to see what type of information currently exists about the prospective student. Using the searching method previously described, first to see if the prospective student exists within Salesforce. If they do here are the things to review:

After conducting a search there are four possibilities of what you will find:

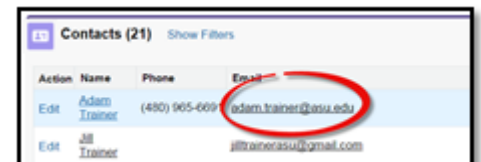
1. Existing contact with current contact opportunity
2. Existing Lead - Convert a Lead (Suspect) to a Contact record and add an opportunity
3. Existing Contact with no Opportunity or outdated Opportunity
4. No Lead or Contact record exists

Existing Contact

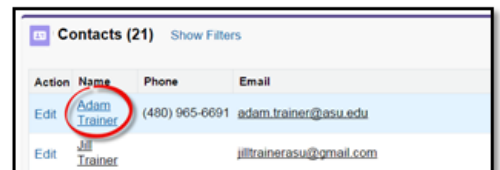
1. Click on the Contact records on the left side.



2. Choose the contact who has asu.edu for their email address. Use your departmental business process to verify the identity of this person.



3. Once you locate the student you are looking for, **click on the contact name** to open their record.



4. From the contact record, you can review the student Case History and Recruitment information by hovering over Cases and Contact Opportunity.

Trainer* Adam Trainer +

Contact Adam Trainer

Show Feed

Cases [5+] Contact Opportunities [1] Open Activities [0] Activity History [2]

Cases New Case

Action	Case	Subject	Status	Priority	Func
Edit Cls	01114931	Can you help me?	New	Normal	Final
Edit Cls	01114930	How do I reset my password	New	Normal	Colle Train

Trainer* Adam Trainer +

Contact Adam Trainer

Show Feed

Cases [5+] Contact Opportunities [1] Open Activities [0] Activity History [2]

Contact Opportunities

Action	Opportunity Name	Type	International Student	Stage	Term	Co
Edit	Adam Trainer-2015-10-09	First Time Freshman	<input type="checkbox"/>	Prospect	2015 Fall	

Existing Lead – How to Convert a Lead to a contact and add an Opportunity

Using the Global Search, you will be able to see if there is a record that exists in Salesforce.

For this example, a search for *landon carter* was performed. We have located the student’s name in the Lead record section.

1. Click the Edit link to access the record.

Action	Name	Lead Record Type	Email
Edit	Landon Carter	Prospective Student	landon.carter@cabulldogs.org.uat

2. Check the box Convert Lead: Perform Conversion.

Lead Edit: Landon Carter

Lead Information

First Name: --None-- | Landon

Last Name: Carter

Middle Name:

Suffix:

Convert Lead: Perform Conversion 2

Save 3 Cancel

3. Click the Save button.

4. The page will refresh and display a link to the new Contact record. Click on the name to view the new Contact record.

Converted Lead

This lead was converted on 10/21/2015.

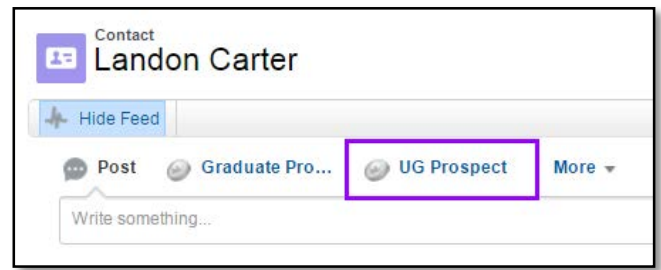
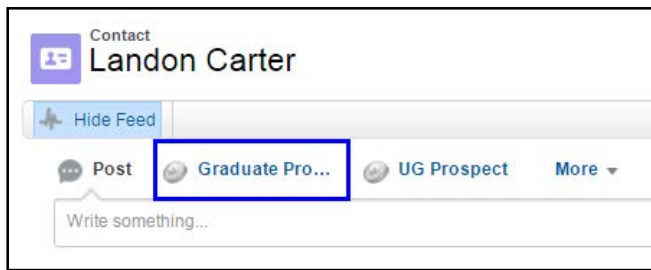
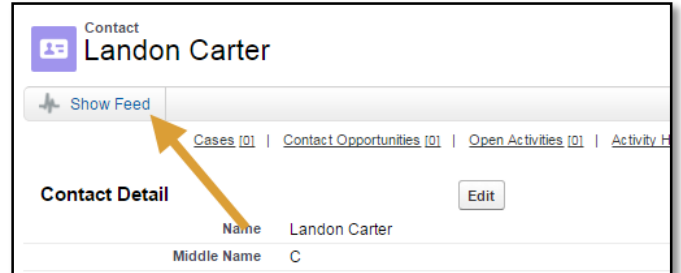
Contact: [Landon Carter](#)

Account: [Landon Carter](#)

5. Create an Opportunity for the new Contact record:

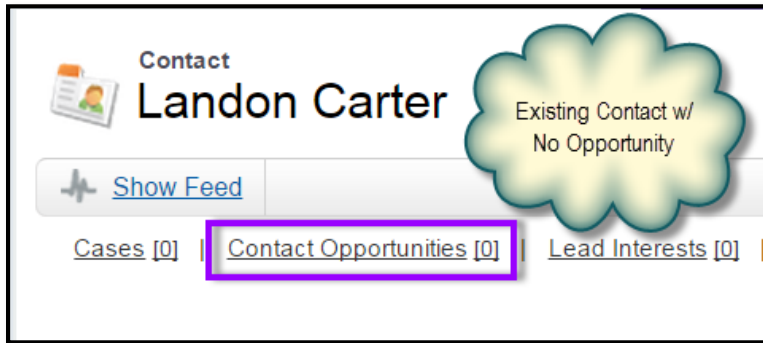
To view the quick action button, click on **Show Feed**.

- A. For Undergrad, Select “**Graduate Prosepect**” quick action button.
- B. For Grad, Select “**UG Prospect**” quick action button.

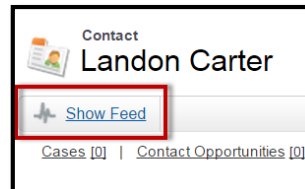


Existing Contact with no Opportunity or an outdated Opportunity

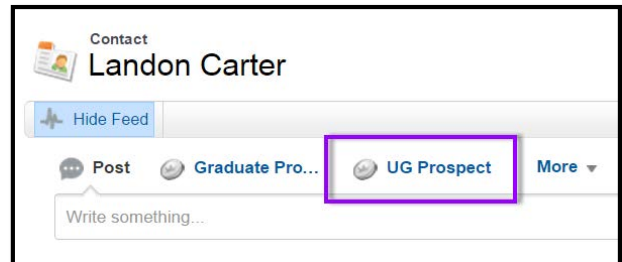
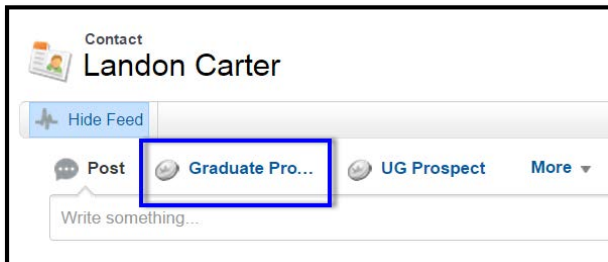
For this example, a search for *Landon Carter* was performed. We have located the student’s name in the Contact record section.



1. To Add the opportunity, click on **Show Feed** to reveal the quick action button.

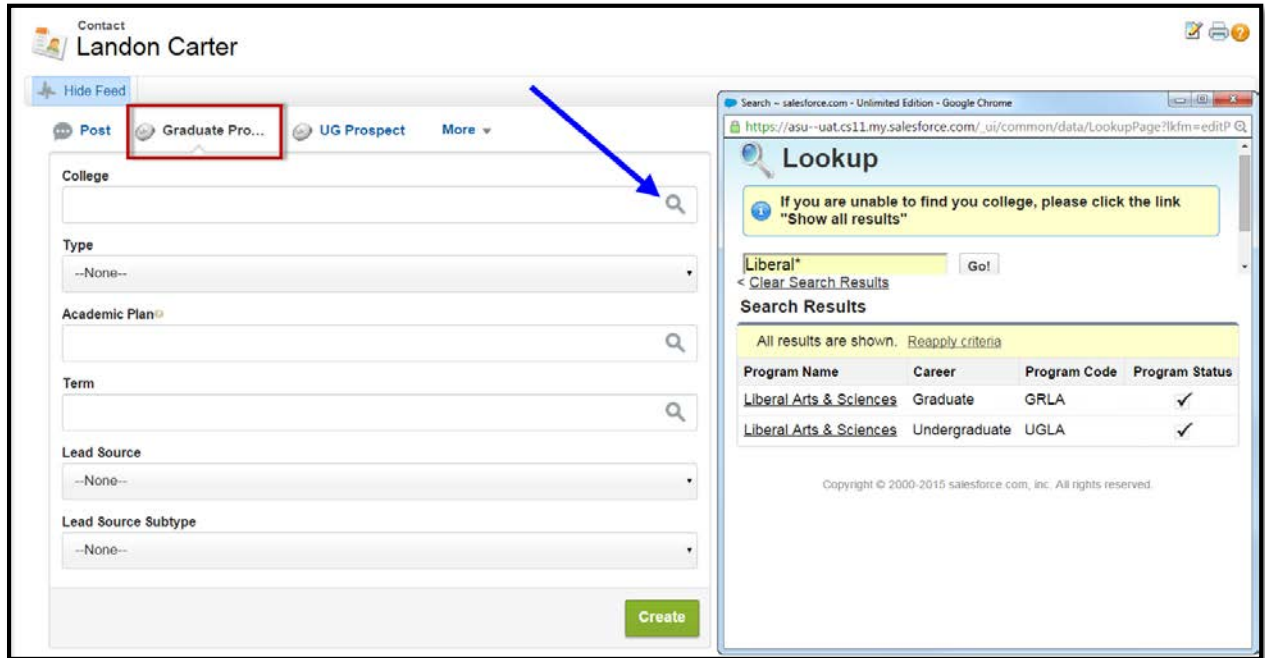


- A. For Undergrad, Select “**Graduate Prospect**” quick action button.
- B. For Grad, Select “**UG Prospect**” quick action button.



Graduate Opportunity

1. Click on the magnifying glass to look up your college name.
2. Type in the name in the Search box.
3. The college names are formatted in the same manner as they are in PeopleSoft. College is a required field. It is the item that links the prospective student to your college.

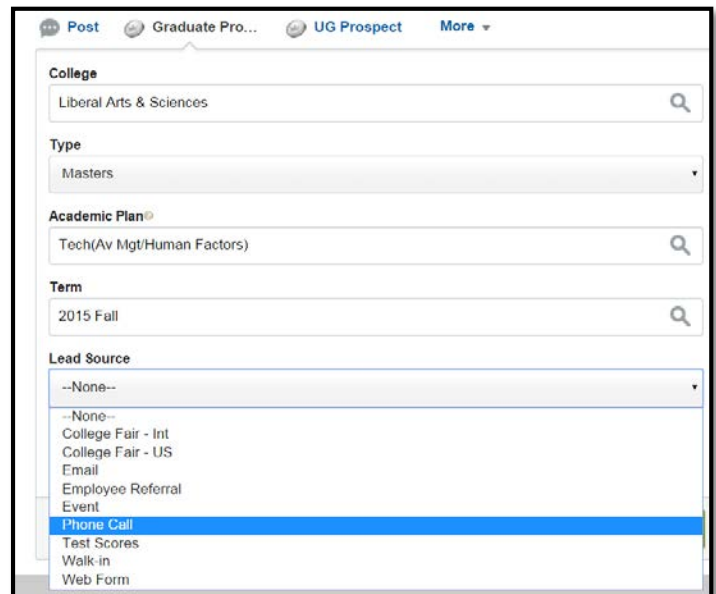


4. Complete the **Type**, **Academic Plan**, and prospective enrollment **Term**, if known. The Lead Source is also a required field. It is a drop-down picklist. The Lead Source Subtype describes the source in more detail.

5. Click the **Create** button. The Opportunity record will appear in the Chatter field

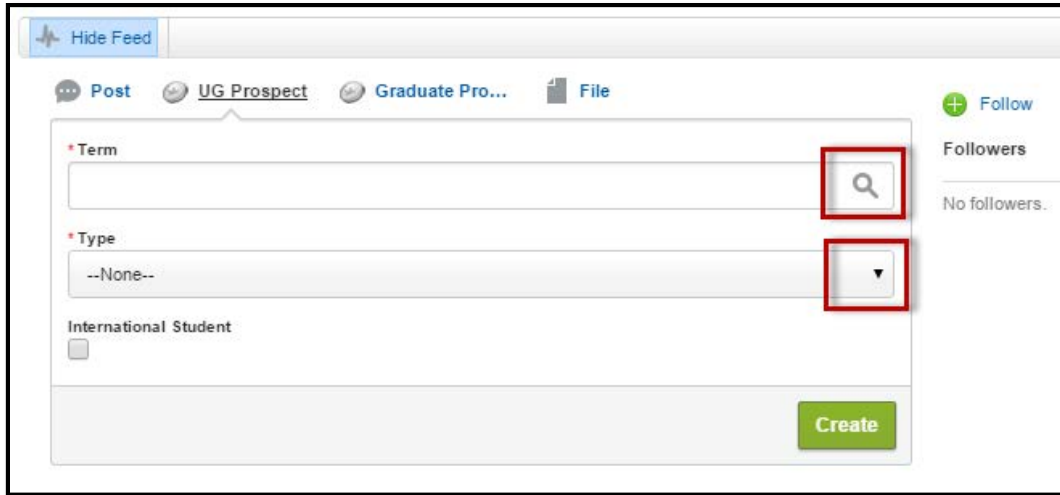


6. Scroll down on the page of the Contact record to add special interests.



Undergraduate Opportunity

1. Click on the magnifying glass then the dropdown to look up student interest **Term** and **Type**.



2. Click the **Create** button. The Opportunity record will appear in the Chatter field.



3. Scroll down on the page of the Contact record to add special interests.

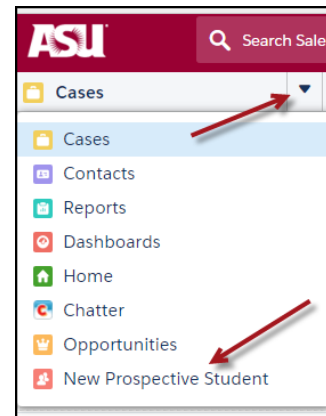
No Lead or Contact Record Exists

If after you perform the Global Search for the prospective student and you do not locate an existing record for that student, you will be able to create both a contact record and an opportunity record using the New Prospective Student page.

Every contact record has a corresponding account record. The Salesforce platform is configured to manage customer relationships with businesses. Having this structure, the account record would contain the business, company, or corporation information. The contact record would be the employees of those businesses. Since we are unable to create a contact without an account, you will see these records. However, the main source of bio demographic information about a prospective student is the contact record.

Create a New Undergrad and Graduate Prospect Record

To create a contact record:
Click on the **objects dropdown** and Select **New Prospect Student**.



The "New Prospective Student" page is separated into 3 sections:

- Contact Information
- Career Selection
- Select a Case or Event

Contact information

Enter these required into the contact information area: First Name, Last Name, Email and one of these two fields: Phone or Zip Code.

 A screenshot of the 'Contact Information' form in Salesforce. The form title is 'Contact Information'. Below the title is a note: 'You must fill out these required fields in order to save the prospect: First Name, Last Name, Email, and one of these two fields: Phone or Zip Code.' The form contains several input fields: First Name, Last Name, Email, Phone, Gender (dropdown), Birthdate (calendar), Mailing Country (dropdown), Country of Citizenship (dropdown), Mailing Street, Mailing City, Mailing State / Province (dropdown), and Mailing Zip/Postal Code. Red boxes highlight the First Name, Last Name, Email, and Mailing Zip/Postal Code fields. The Phone field is highlighted in yellow.

Career Selection

The New Prospective Student form now contains the option to choose Undergraduate or Graduate Career. This is a required field. Depending on the Career selected, new options will appear on the form that are specific to the selected career choice.

Undergraduate

Under the Undergraduate Opportunity Information section, complete the fields and checkboxes as they apply to the student’s situation. The fields include Term, Type, Military Status, Interested in Online Degree, International Student, Previous Institution and Interests.

Note: It is best practice to always add the student interest, to ensure the student is included in interest based messaging and receives relevant content.

Graduate

Under the Graduate Opportunity Information section, complete the fields and checkboxes as they apply to the student’s situation. Military status is tracked on the prospect’s opportunity. Academic plan is populated based on the College selected.

Select a Case or Event

The Select a Case or Event section is located at the bottom of the form. The case or event is used for source tracking. You must enter either a Case OR an Event, not both. Select the type of interaction you

had with the prospective student, Case or Event. The case allows you to log an interaction with the student; the event adds the student to an event.

If creating a case; enter the Origin, Functional Group, Category, Subject and Description. *Remember, the Subject and Description are visible to the student in the Service Center, so enter accordingly.*

If adding an event participant; search the event using keywords such as event name, type or category and select the event from the search results and click “Select” next to the event. To create events, send the Event details (Name, Type, Location, Date, Time) to recruitmentcrm@asu.edu or create a Salesforce case and assign it to the “Enrollment Services ISD” functional group.

The screenshot shows a web form titled "Select a Case or Event". It has two tabs: "Case" (highlighted in red) and "Event". Under the "Case" tab, there are four dropdown menus: "Origin" (with "--Select--"), "Functional Group" (with "--None--"), "Category" (with "--None--"), and "Sub-Category" (with "--None--"). To the right, under the "Notes" section, there is a "Subject" text input field and a larger "Description" text area.

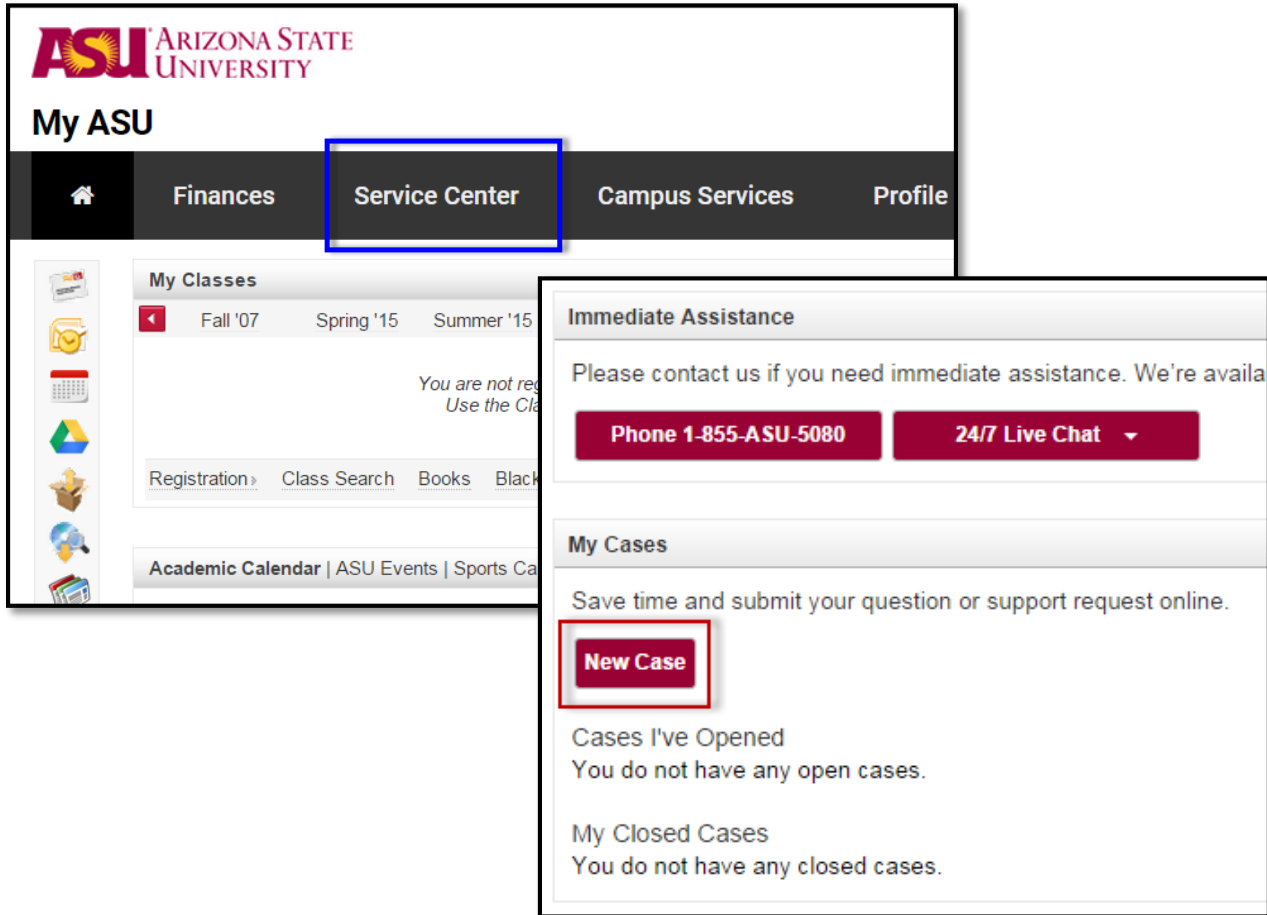
Creating New Cases

Four ways a Case can be created:

- My ASU Service Center (By a Student)
- Manually created (Walk-in or Phone Calls from Student or customer)
- An email is sent to your departments alias
- Transferred to you from other departments

My ASU Service Center (Student View)

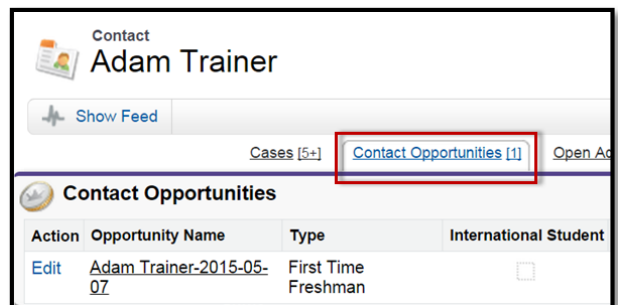
A student logs into My ASU, click on the Service Center tab and submits a New Case that will be routed to the appropriate functional group or college to address.



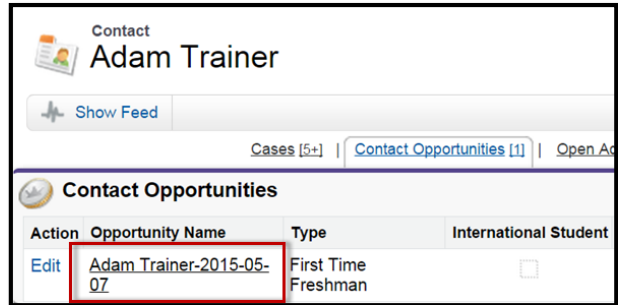
Manually Create a New Case

A prospective student walks into your office to get support or you receive a phone call or perhaps an email from them directly.

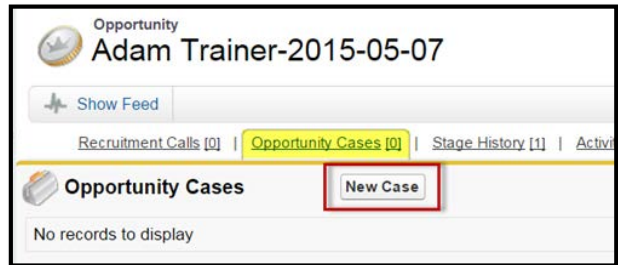
1. Determine that an opportunity has been created
 - A. If an opportunity has not been created you will need to create one before proceeding.
 - B. Hover over Contact Opportunities



2. Click on the **Opportunity Name**

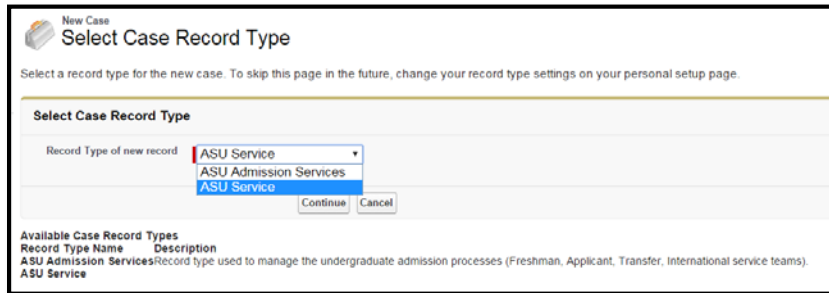


3. Hover over Opportunity Cases and Click **New Case**. Creating the case from the opportunity will establish the relationship between the case and this specific recruitment record. This will differentiate between Recruitment Cases and Service Case.

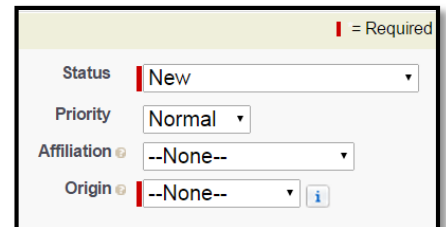
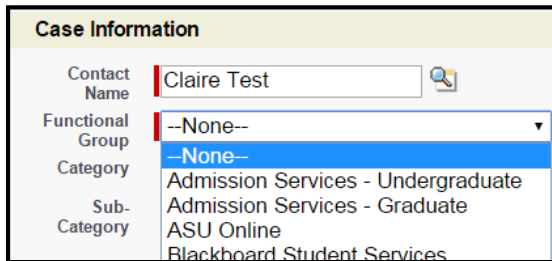


Note: When you click on New Case, if you have multiple roles in ASU Connections you may come across the screen below.

- 1) If you are in Admission Services, choose ASU Admission Services
- 2) If you are not in Admission Services, choose ASU Service



4. Select the **Functional Group**.



5. Change the **Status** and **Priority** if necessary. Identify the **Affiliation** (How is the customer associate with ASU) and **Origin** of how the student contacted you.
6. Enter the **Subject** of the interaction and add case details in the **Description** field.

The screenshot shows a form titled "Subject and Description" with two input fields: "Subject" and "Description".

NOTE: The Subject and Description of the case will be visible to students who have access to My ASU, be sure that the subject and description will make sense to a student who may be reading it.
***Before you can transfer a Case, the Subject & Description must be completed.**

7. Saving the New Case:

Save - to save the case

Save & Close – to Save and Complete or Close the Case. Choosing this option will close out the case not the window.

Save & New – allows you the ability to create one case after another. Save the current case and new case will open.

Check Spelling – to check your spelling

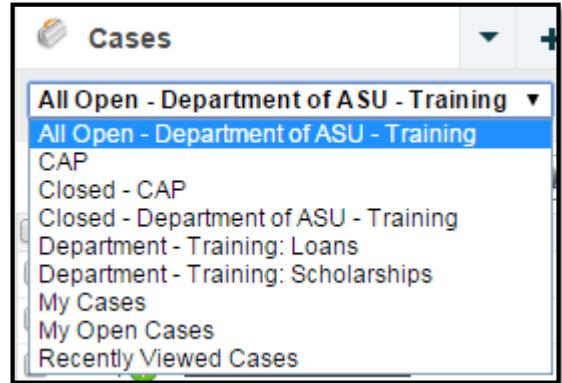
Cancel – will not save any changes you made to the record.

The screenshot shows the "Case Edit" interface for a "New Case". A red box highlights the action buttons: "Save", "Save & Close", "Save & New", "Check Spelling", and "Cancel". Below the buttons, there is a "Contact Name" field and a "Status" dropdown menu currently set to "New".

Managing Cases for Prospective Students

Case List View

- A. **All Open** – Department of ASU – Training (Regardless of who owns the case or which category, all open department cases will be listed here)
- B. **Closed** – Department of ASU – Training
- C. **Training: Loans/Scholarship** (FG and Category)
- D. **My Cases** (All of your cases, open or closed)
- E. **My Open Cases** (Only open, you must be the owner)

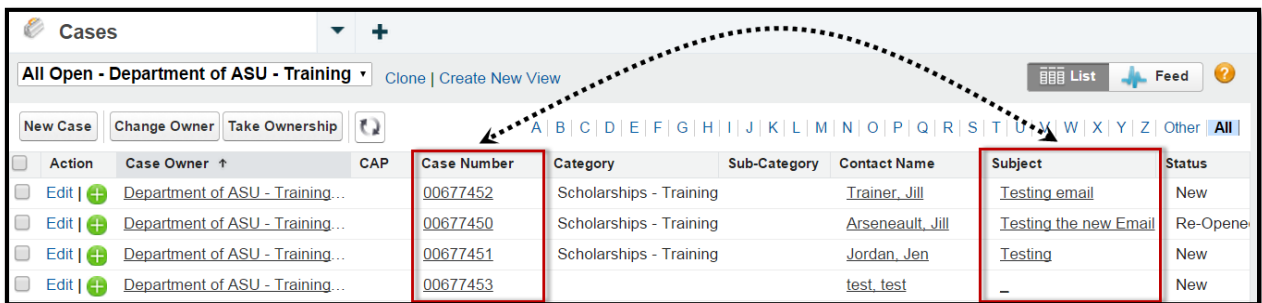


Change to A Different Category within Your Department

***Before you can transfer a Case, the Subject & Description must be completed.**

You receive a case from a current student that will be answered by a different team within your functional group.

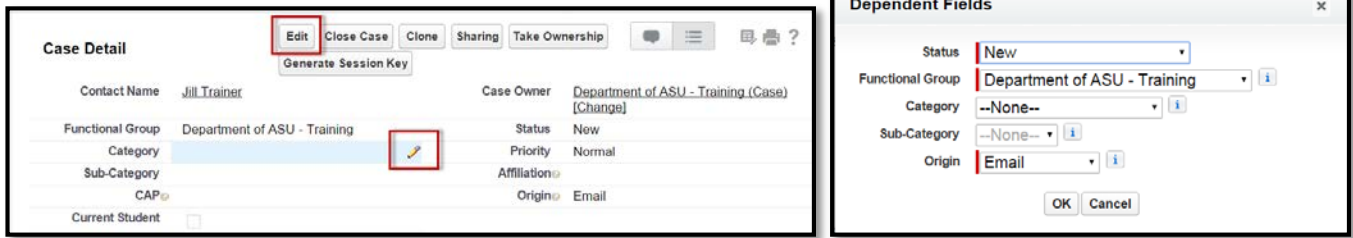
1. From the List View click the **Case Number** or **Subject** to open a Case.



2. Click on the Detail button to display the case details.

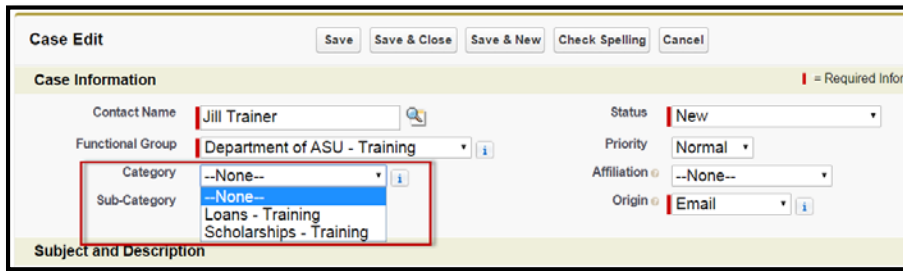


- Click the **Edit** button or Click the Pencil icon to open the **Dependent Fields** window.

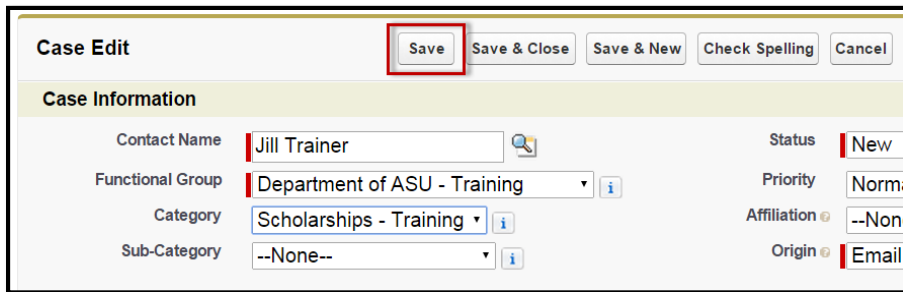


Note: Never change the Functional Group from the Dependent Fields screen.

- Choose the **Category** for the team to whom you are sending the case.



- Click **Save** The case will be listed in the appropriate Category or Sub-Category to be resolved by that team.



Change Ownership to a Department

***Before you can transfer a Case, the Subject & Description must be completed.**

You receive a case from a student but the case needs to be answered by another department (or User in your department) using ASU Connections.

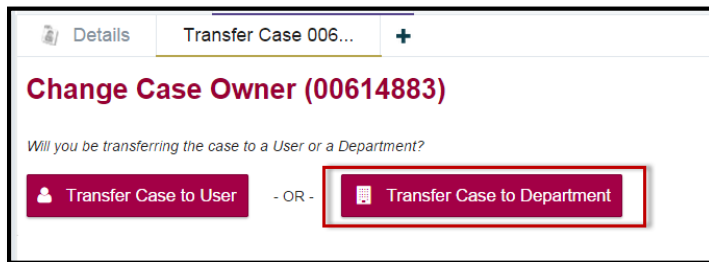
1. From the List View click the **Case Number** or **Subject** to open the Case.
2. Click on the Detail button to display the case details.



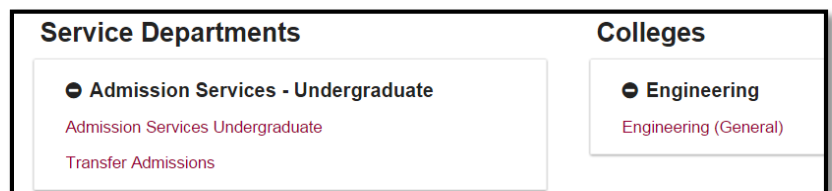
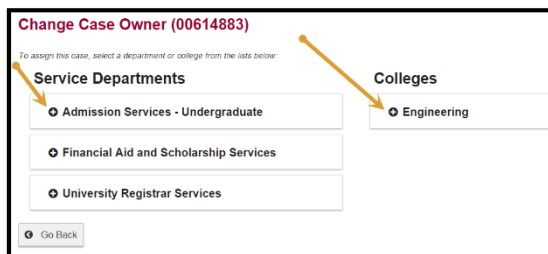
3. Click **Transfer Case**.



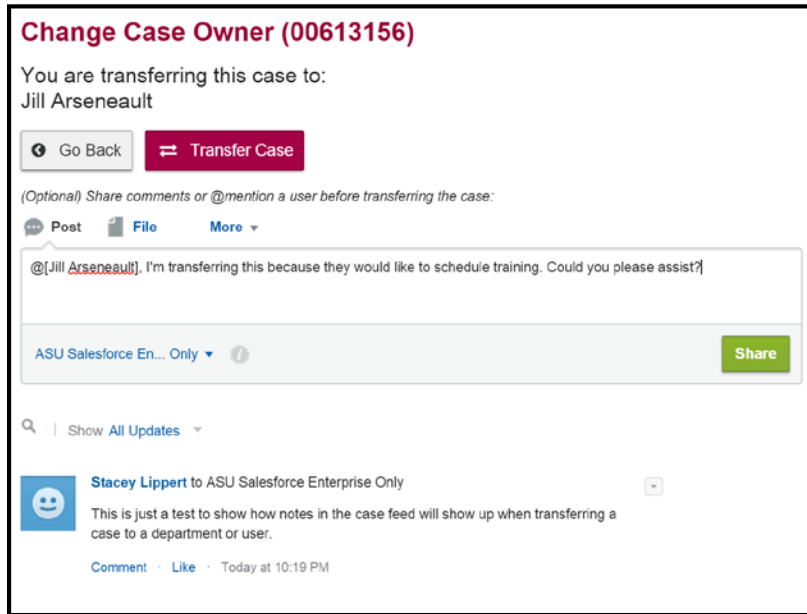
4. Click **Transfer Case to Department** (note: you can only transfer to a specific user within your functional group)



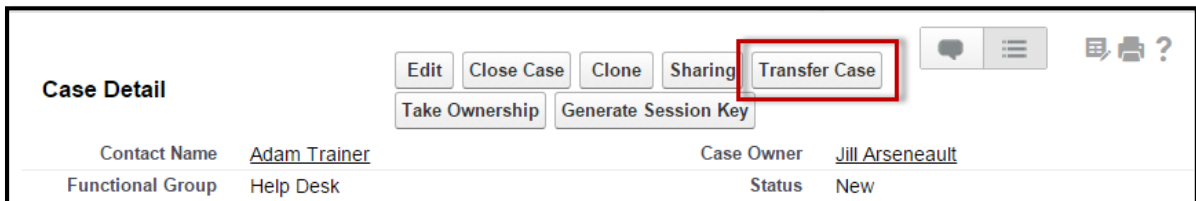
5. Click the **+** sign next to the Service Department or College to reveal specific options



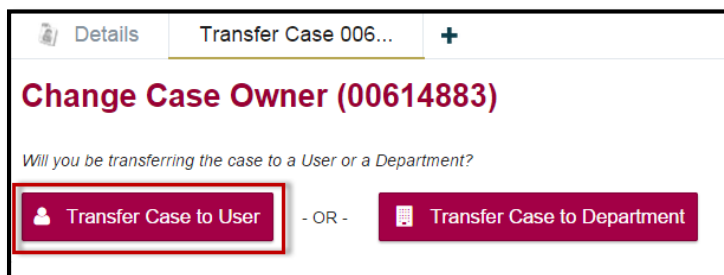
- You can post to the case’s Chatter feed before you click **Transfer Case**.



- If you do not see the Functional group the case needs to go to, skip to [Forward to Another department Not Using ASU Connections](#)
- To transfer the case to a colleague in your department or college, Click **Transfer Case**



- Click **Transfer Case to User**



10. You will only see a list of users who are in your college or department. Click on the User name of the person you would like to transfer the case to.

Change Case Owner (00614883)

Select a User to Transfer the Case to:

Filter results **Clear**

User	Title	Department
Crystal Gustavson	Asst Dir Communications	Office of University Provost
John Harris	Knowledge Mgmt Analyst	Office of University Provost
Raquel Garcia	Business Analyst Assoc	Office of University Provost

Go Back

11. You can post to the case's Chatter feed before you click **Transfer Case**.

Change Case Owner (00613156)

You are transferring this case to:
Jill Arseneault

Go Back **Transfer Case**

(Optional) Share comments or @mention a user before transferring the case:

Post File More

@Jill Arseneault, I'm transferring this because they would like to schedule training. Could you please assist?!

ASU Salesforce En... Only **Share**

Show All Updates

Stacey Lippert to ASU Salesforce Enterprise Only

This is just a test to show how notes in the case feed will show up when transferring a case to a department or user.

Comment Like Today at 10:19 PM

Forward to Another Department Not Using ASU Connections

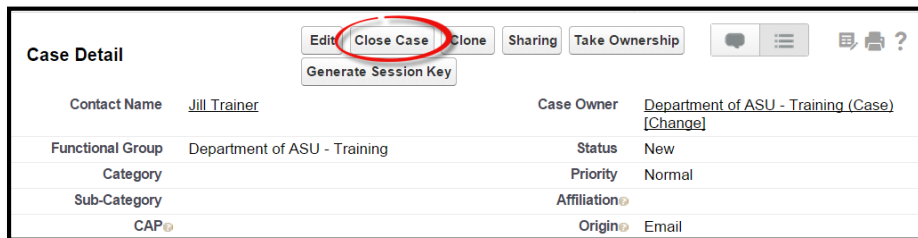
***Before you can transfer a Case, the Subject & Description must be completed.**

You receive a case from a student but the case should be answered by a department that is not currently using ASU Connections.

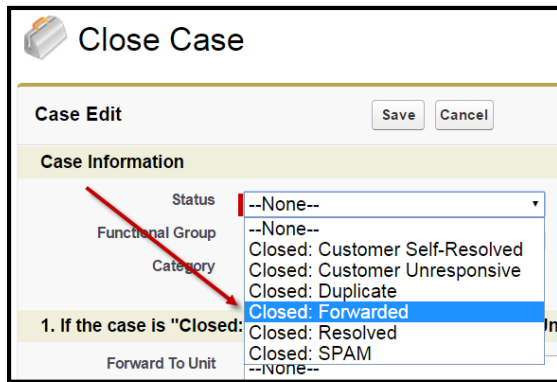
1. From the List View click the **Case Number** or **Subject** to open the Case.
2. Click on the Detail button to display the case details.



3. Click **Close Case** in the Case Details view.



4. Change the Status to **Close: Forwarded**.



- A) In the drop-down menu choose the Unit to which you want to forward the case. If the item you are looking for is not on the list select **Other Unit**.
- B) If forwarding to an individual enter their email address.

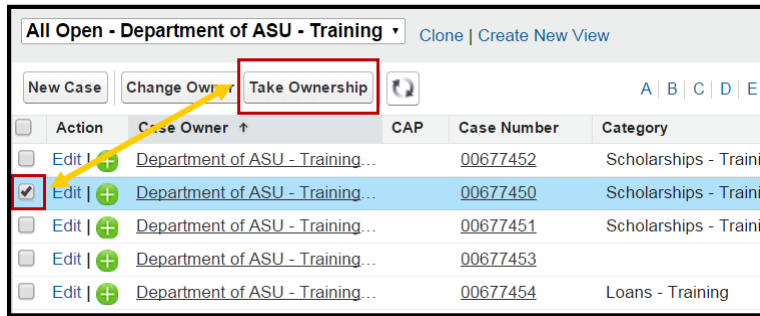
The screenshot shows the 'Case Edit' interface. At the top, there are 'Save' and 'Cancel' buttons. Below them are three dropdown menus: 'Status' (set to 'Closed: Forwarded'), 'Functional Group' (set to 'External Unit'), and 'Category' (set to '--None--'). A red box labeled 'A' highlights the 'Forward To Unit' dropdown menu, which currently shows 'Other Unit'. Below this, another red box labeled 'B' highlights the 'Forward To Email' text input field, which contains the email address 'Joe.Smith@asu.edu'. Underneath is a text area for 'Forward Case Comments' with the text 'Here's why I'm forwarding this case to you.'. At the bottom, there are 'Save' and 'Cancel' buttons. A legend on the right indicates that a red vertical bar next to a field name means it is required information.

- 5. Be sure to input a clear and professional message to the recipient about why you are transferring the case to them and any other details because the recipient may not be able to get into Connections to see the case details.
- 6. Click **Save**. An email with case information will be sent to the external unit.
- 7. You can follow the case should you wish to know the outcome or any updates on it.

The screenshot shows the 'Case Detail' page. On the left is a sidebar titled 'RELATED LISTS' containing links for 'Bomgar Sessions (0)', 'Activity History (1)', and 'Case History (2)'. A red box highlights a '+ Follow' button in the sidebar. Below the sidebar is a 'Followers' section showing 'No followers.'. On the right is the main 'Case Detail' area with fields for 'Contact N', 'Functional G', 'Cate', 'Sub-Cate', 'Current St', and 'Thunderbird Teac'.

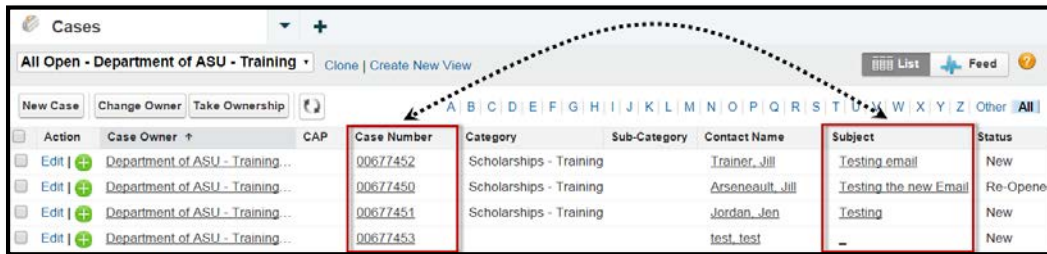
Taking Ownership of a Case

To Take Ownership of a case click on the box next to the Case you want and then click **Take Ownership** to accept the case as yours.



To Open and View a Case

To Open and View a case, Click on either the **Subject** or the **Case Number**.



Contact Details vs. Case Details

Contact Details	Case Details
Name, Email, Address, Phone, Birthday	Contact Name
Deceased	Functional Group (department) case is assigned to
Email Opt Out, Do Not Call	Case Owner
Parent Email	Status: Open, In Progress, Closed
Event Attendance	Origin
Interests	Subject and Description
Scholarships	Private Notes
Source List	
Marketing/Communication Campaigns	
Previous Education	
Test Scores	

Case Record

Case Details

To access the Case Details, click on the details icon.



- A. View the Contact Name
- B. Review Functional Group this case was assigned to.
- C. Change the Category, Sub-Category, Case Owner or Status of the case
- D. Brief Contact Information
- E. Subject & Description of the Case
- F. Follow this case

Case Detail

Contact Name	Jill Arseneault	Case Owner	Jill Trainer [Change]
Functional Group	Department of ASU - Training	Status	Re-Opened
Category	Scholarships - Training	Priority	Normal
Sub-Category		Affiliation	Student
CAP		Origin	Email

Contact Information

Contact Phone: _____ Contact Email: jarsenea@mainex1.asu.edu

Subject and Description

Subject: Testing the new Email
 Description: What are Objects in Salesforce?
 Jill Arseneault, M.Ed.

- G. View the Case Attachments

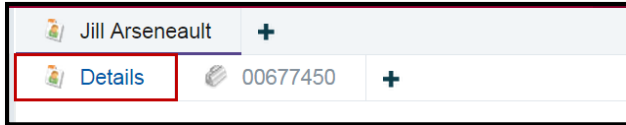
Case Attachments

All Attachments [Attach File](#)

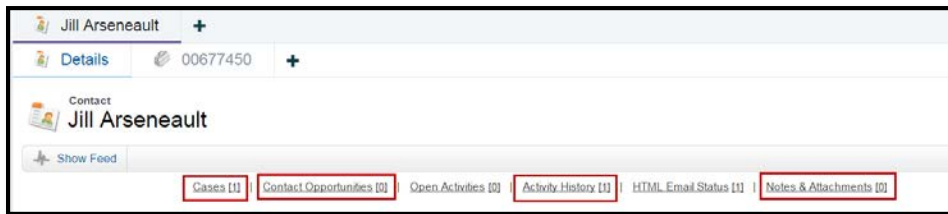
Action	File Name	Size	Last Modified	Created By
Edit View	SalesforceCaseManagement.docx	1768 KB	4/6/2015 11:32 AM	Jill Arseneault

Contact Details

1. Click on the Details tab to review the Contact Details.

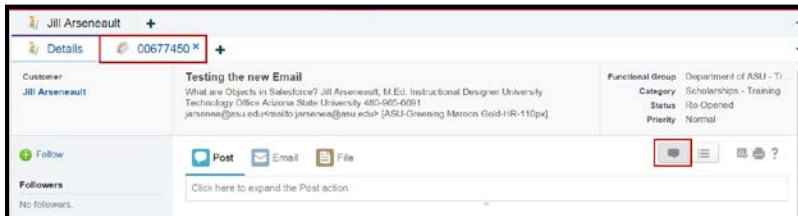


2. From the Contact Details you can review:
 - a. Previous Cases
 - b. Contact Opportunity – Student Recruitment Record
 - c. Activity History
 - d. Notes & Attachments

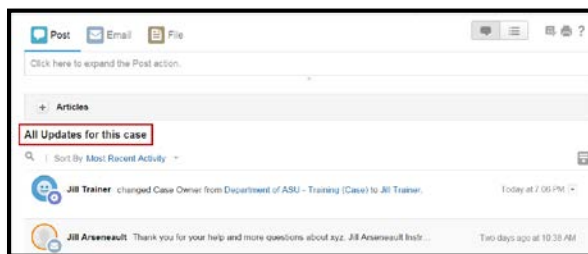


Case Feed

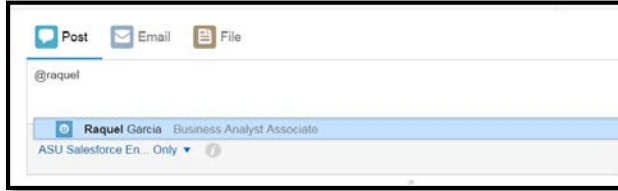
1. To access the Case Feed, click on the Case Number tab to access the Case Feed icon.



2. From the Case Feed you can:
 - A. Collaborate across the university
 - B. Send an Email
 - C. Attached files to the Case
 - D. Review All Updates for this case



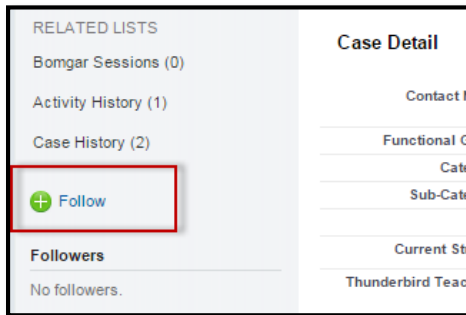
- 3. The Post feature will allow you to:
 - A. Tag colleges or functional groups by @mentioning them.



- B. Write Case Notes that will not be displayed in the students My ASU Service Center

Follow a Case

You can follow the case should you wish to know the outcome or any updates on it.



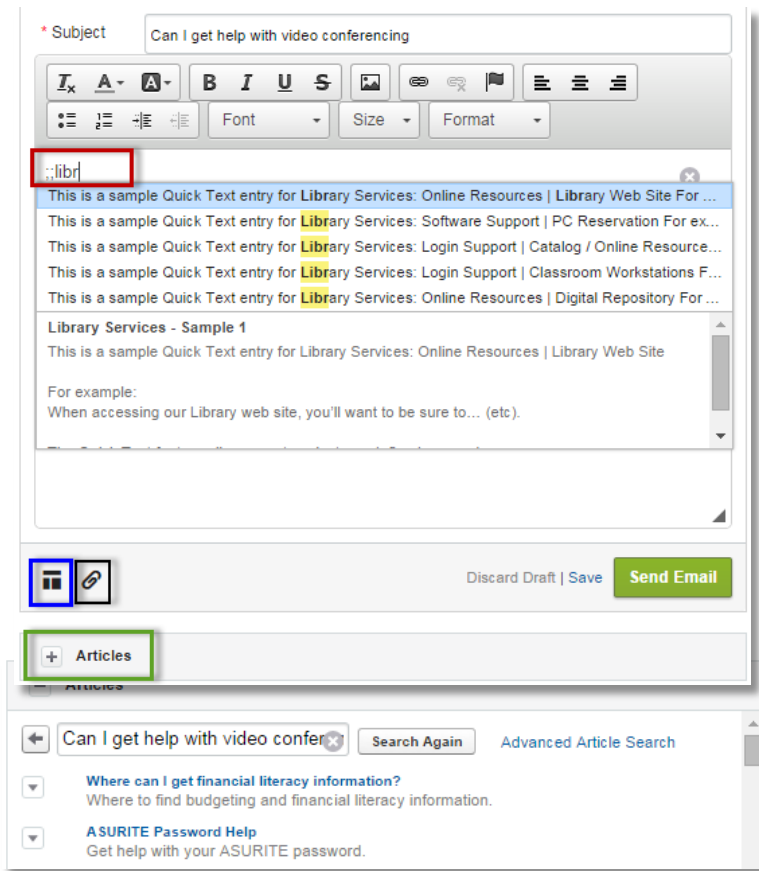
Answer Customer and Resolve

1. The Case you have selected will open in the Feed view. Click **Email**.



Add BCC/CC

- You have the ability to use **Quick Text**, **Templates**, attach documents and **Knowledge Base Articles**.
- **Quick Text** – Is activated by two semi colons (;;) then your department’s key word or phrase. (i.e. library, financial)
- **Templates** – Click the templates icon to display a list of templates. Select the template for your department.
- **Documents** – Click on the paper clip icon to attached documents from your local drives.
- **Articles** – Click on the + sign next to Articles to see a list of Knowledge Base Articles that are relevant to the subject line of your response to the customer.
- Click **Send Email**.
- Scroll down on the page to see your email listed under **All Updates for this Case**.

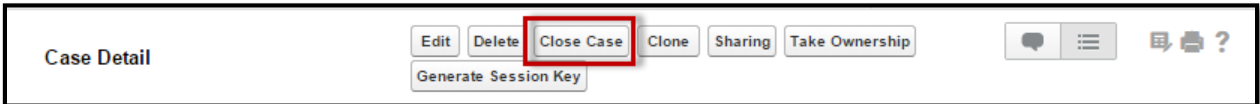


Resolve the case

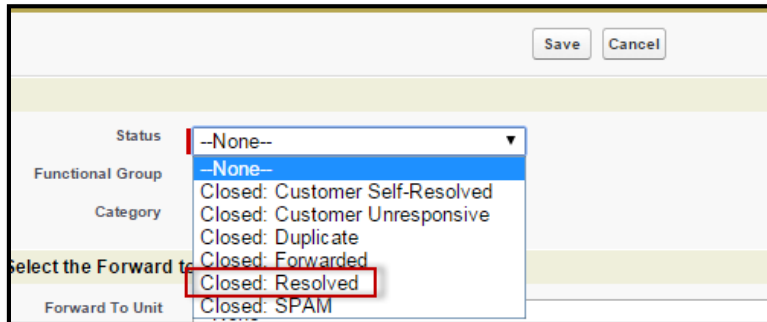
1. To resolve the case click the **Details** icon.



2. Click **Close Case**.



3. Change status to **Closed: Resolved**.



4. Click **Save**.

Notes: Resolution time is expected to be less than or equal to 2 business days.

Manage Contact Records

Opting Students out of Phone calls, Email Marketing & Identify Possible Duplicates

1. In the Contact Details section, Click Edit
2. Check the box for Do Not Call, Email Opt Out and/or Possible Duplicate
3. Click **Save**

Salesforce Mastered record view

The screenshot shows the 'Contact Edit' form in Salesforce. The 'Contact Information' section includes fields for First Name (Adam), Last Name (Trainer), Middle Name, Suffix, CAP Possible, and Email (adam.trainer@asu.edu). The 'Contact Preference' section has checkboxes for Deceased and Possible Duplicate. The 'Contact Details' section has checkboxes for Do Not Call and Email Opt Out. Red boxes highlight the 'Possible Duplicate', 'Do Not Call', and 'Email Opt Out' checkboxes.

External Mastered (PeopleSoft)

The screenshot shows the 'Contact Edit' form in PeopleSoft. The 'Contact Information' section includes fields for First Name (John), Last Name (Trainer), Middle Name, Suffix, EMPLID (1234567890), ASURITE ID (jtrainer), CAP Possible, and Email (john.trainer@asu.edu). The 'FERPA Directory Hold' section has a 'No Hold' option. The 'Contact Preference' section has checkboxes for Email Opt Out, Do Not Call, Deceased, Duplicate, and Possible Duplicate. Red boxes highlight the 'Email Opt Out', 'Do Not Call', 'Duplicate', and 'Possible Duplicate' checkboxes.

Viewing Marketing Campaign History

To view campaign information for a prospective student:

1. Open the Contact Record and scroll down to the Campaign Member Management section.
2. Click on Marketing/Communication (print, invites, mass marketing, etc.)

▼ Campaign Member Management

Events	Interests	Scholarships	Cohorts	Other Sources	Marketing/Communication
Actions	Campaign Name	Type	Department / College	Status	Status Updated
View	TRN Admit Email 1-Email-ugrad-F15-TRN-Admit and Enrolled-CRF 1379	Email		Sent	3/11/2015 9:18 AM
View	TRN Admit Email 2-Email-ugrad-F15-TRN-Admit and Enrolled-CRF 1379	Email		Sent	3/12/2015 9:39 AM
View	2015 Fall Admit Packet	Mailing	Enrollment Services	Sent	2/19/2015 3:03 AM
View	2015 Fall College Review Admit Letter	Mailing	Enrollment Services	Sent	2/10/2015 2:52 AM
View	FTF-TRN Valentine Email/Pros-Admit/1634	Email		New	2/12/2015 4:26 PM
View	CLAS Admit Email 1-Email-ugrad-F15-FTF-TRN-Admit and Enr-CRF 1380	Email		Sent	3/26/2015 10:57 AM
View	M2E Email Push 1/F15-F16/Suspect-Enrolled/CRF 1184	Email		New	1/12/2015 3:10 PM
View	M2E MAPP Session Push 1/F15-16/ALL/CRF 1582	Email		New	1/28/2015 2:48 PM

Note: For additional information about email Campaign activity, click on the Silverpop Email Activities related list.

Show Feed

[Cases \[5+\]](#) |
 [Student Groups \[5+\]](#) |
 [Service Indicators \[1\]](#) |
 [Contact Opportunities \[1\]](#) |
 [Financial Aid Packages \[2\]](#) |
 [Student Accounts \[1\]](#) |
 [Lead Interests \[0\]](#) |
 [Open Activities \[0\]](#) |
 [Activity History \[0\]](#) |
 [HTML Email Status \[0\]](#) |
 [Silverpop Email Activities \[3\]](#) |
 [Previous Education \[1\]](#)

Silverpop Email Activities [Silverpop Email Activities Help](#) ?

Action	Silverpop Email Name	Subject	Status	Sent Date/Time	Open Date/Time
	12.4.14 CLAS unit admit welcome_email (ugrad SP2015-FA2015-TRN-INTL FTF-INTL TRN	A special message from your ASU academic home	Received	12/4/2014 11:04 AM	12/20/2014 10:51 AM
	12.3.14 TRN Admit #2_Series.9.Spring 2015 (Next	Steps for attending ASU	Received	12/3/2014	12/20/2014

3. In Contact Insight section you will find the list of email communication, allowing you to see the actual content of the messages. (Occasionally you may need to click on View All Message to see older messages)

▼ Contact Insight

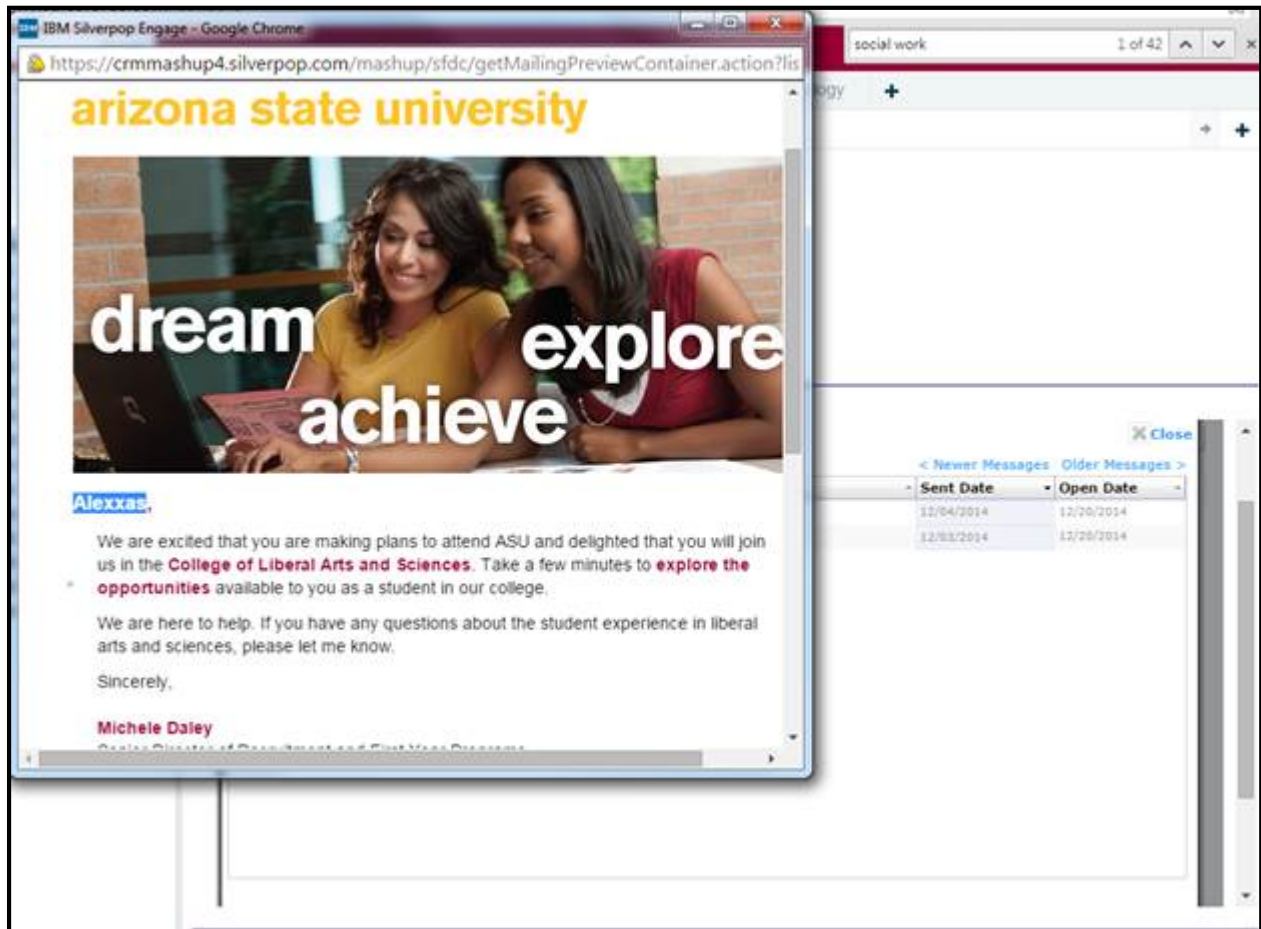
All Messages Close

From 12/02/2014 to 05/31/2015

< [Newer Messages](#) [Older Messages](#) >

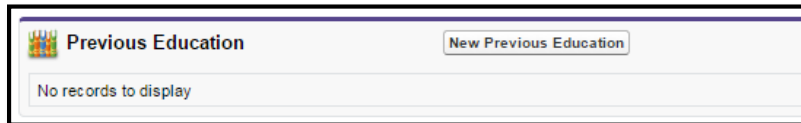
Messages	Sent Date	Open Date
A special message from your ASU aca	12/04/2014	12/20/2014
Steps for attending ASU	12/03/2014	12/20/2014

4. Click on the Email Name to view the campaign message.

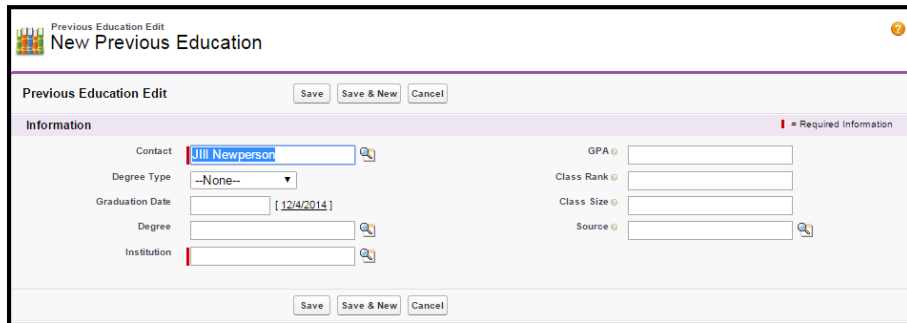


Undergraduate Only Adding/Editing Students' Previous Education

1. We cannot delete previous education - if you need to, would need to submit a previous education
2. We also cannot change the "most recently attended" right now
3. Adding a new one would automatically make the system think it is the most recently attended
 - a. We should check as we do this to verify that the primary has switched and that the territory manager has switched
4. Currently cannot search by CEEB for high school
5. Steps to add/edit students' previous education
 - a. On contact
 - b. Scroll to Previous Education

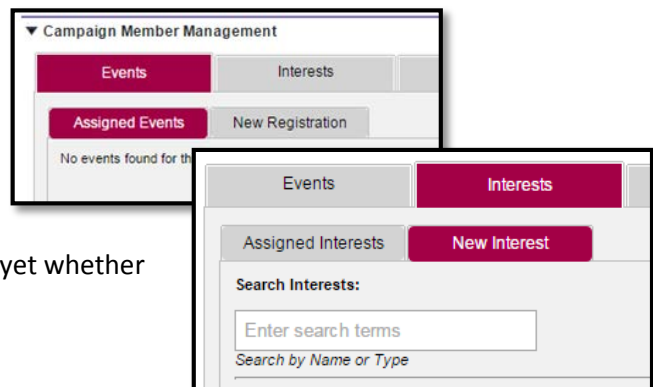


- c. Click on **New Previous Education**
- d. Type in the **Institution** or search for it by clicking the magnifying glass
- e. Verify that it is the right school
- f. Click save



Undergraduate Only Adding/Editing Student Interest

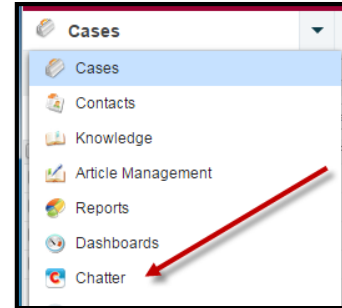
1. On the Contact Record
2. Scroll down to **Campaign Member Management**
3. Click on the **Interests tab**
4. Select a major – note Salesforce is still working through this process - we don't know yet whether we will have the PS Major codes



About Chatter

Chatter is ASU Connections collaboration application that helps you connect with people and share business information securely and in real time.

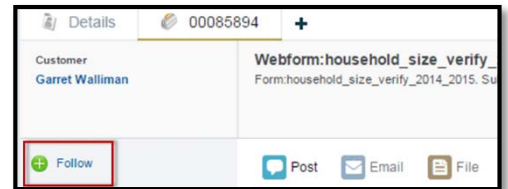
To access Chatter click on the Objects drop-down list and click on Chatter.



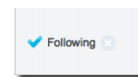
With Chatter, you can:

- Find and follow people in your ASU Connections organization.
- Follow records to see changes to those records in the Chatter feed on your Home tab and Chatter tab.
- Receive email notifications when activities happen in Chatter.
- Bookmark a post that interests you and receive email notifications when someone comments on that post.
- Update your status so people can see what you are working on.
- Post a file or a link to share with other people.

Chatter is a way to collaborate with your team on case questions or updates. You can form groups, follow cases, and add comments or questions to cases that aren't in your Unit or Team.

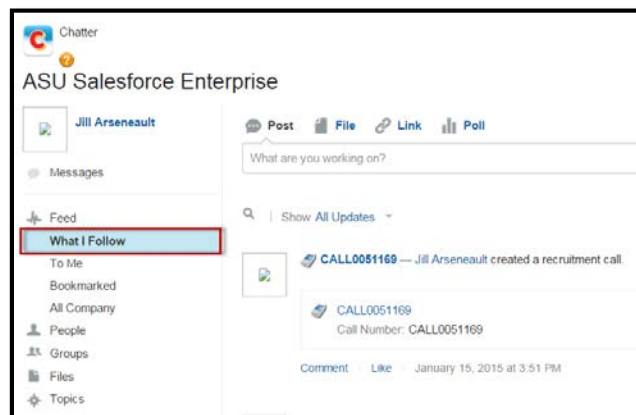


- Click Follow from either the Feed View or the case Detail View of a case.



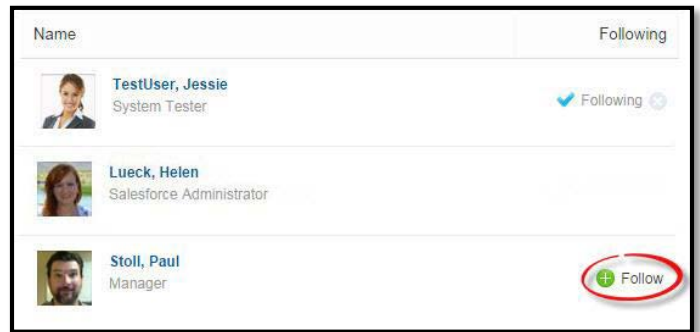
- It will change to a check mark to indicate that you are now following the case.

All updates to a case will be listed in your "What I Follow" area.



Following People

Follow people to see updates in your Chatter feed including posts, comments, and likes. To follow a specific person within ASU Connections, you can find them using the Global Search or select the ASU Connections Chatter app and navigate to the People tab. You will find a list of People who are users within ASU Connections. To follow a person, click the green plus sign. It will add the person to your Chatter feed. This Feed is called "What I follow."

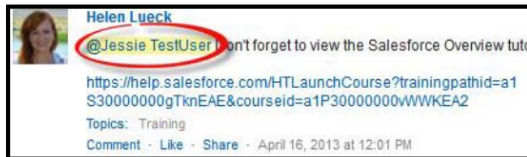


Once you follow people, you see their posts, comments, and likes in your Chatter feed. You can follow maximum combined total of 500 people, topics, and records. To stop following a person, hover over the person's name and click blue X button next to Following. When you stop following a person, you don't see future updates from that person in your Chatter feed.

Mentioning People

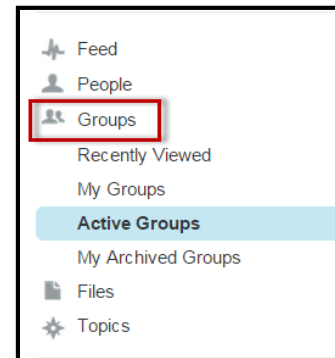
To mention a person, type @FirstName LastName to highlight a user. This will ensure that the comment is sent to the person. After you post the comment, the person's name becomes a link to their profile. When you mention a person your post appears in the person's To Me Feed. Chatter also sends an email notification to the people you mentioned.

If you want to bookmark a post you want to locate again, click on the "Bookmark" dropdown menu choice in the right corner of the post.



Groups

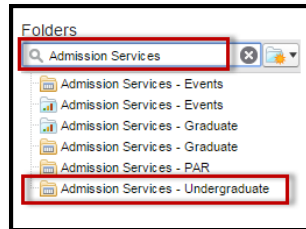
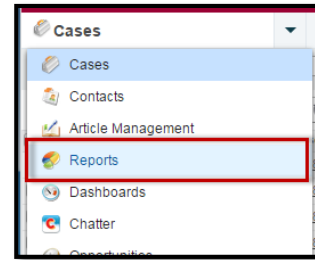
Groups let you collaborate with specific people. These groups can be either Public or Private. Public groups allow anyone in our ASU Connections org to view the posts, comments, or files. However, only members can post, comment, or add files. Private groups only allows group members to view, post or comment in the group. People will need to be invited to the group to join or asked to be added by the group owner.



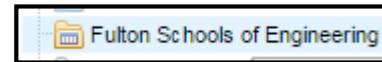
Recruitment Calling/Contacts Campaigns

1. Navigate to the applicable Calling/Contact List Report

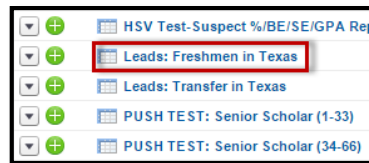
- A. Select "Reports" from Object dropdown list
- B. Select applicable report folder
 - a) For Admissions Services: "Admission Services – Undergraduate"



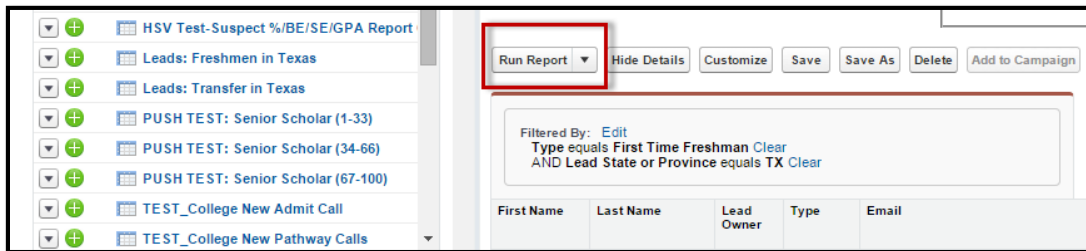
- b) For College Users: the report folder will be the applicable college name



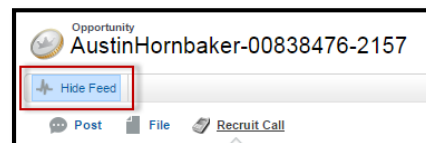
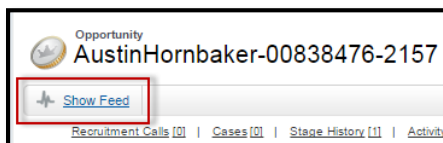
C. Select the report you want to run.



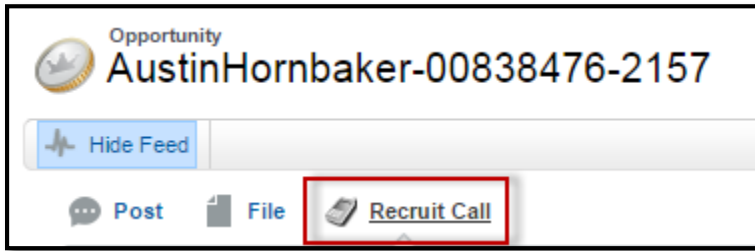
D. Click Run Report



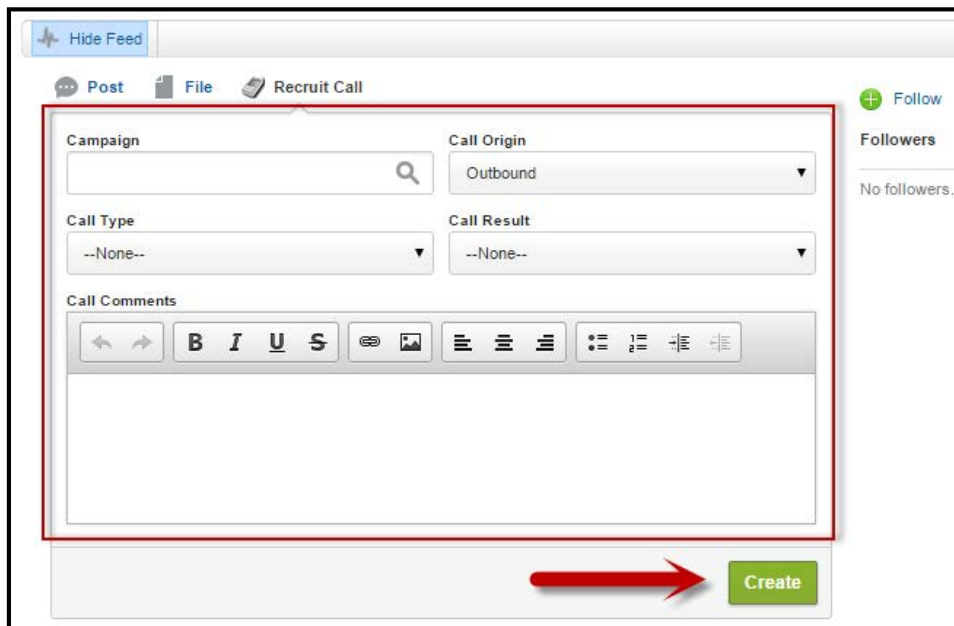
2. Open Opportunity by clicking on the **Opportunity ID** or **Opportunity Name**. Click on Show Feed to switch to Hide Feed view.



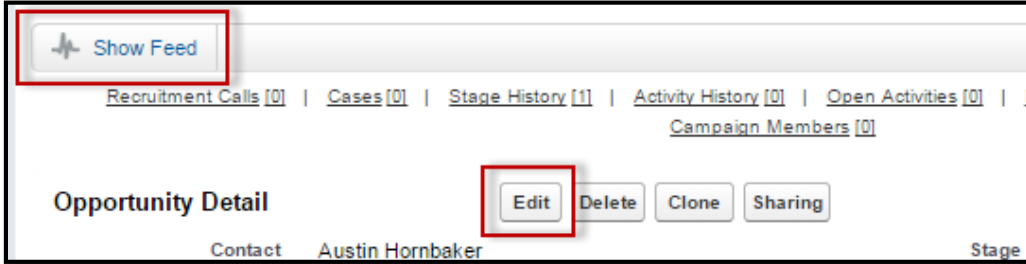
3. Select Recruitment Call action button.



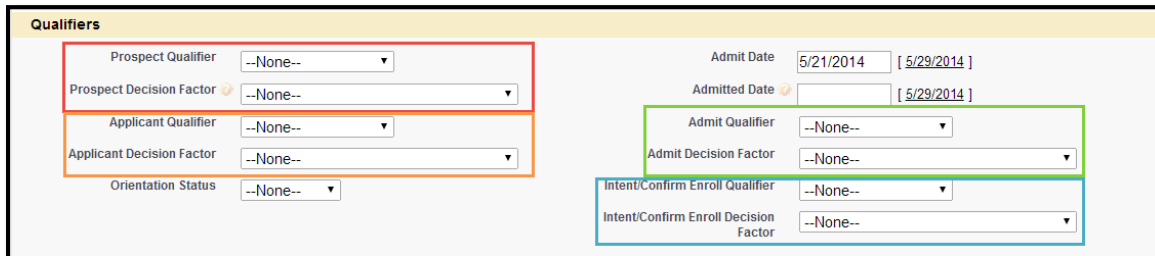
- A. Enter in the appropriate Campaign (Lookup) – applicable to Event Call only
- B. Enter in the appropriate Call Type (Picklist)
- C. Enter in the appropriate Call Result (Picklist)
- D. Enter in any additional comments reflecting what was talked about during the call.
- E. Press Create
 - a) By selecting Create, this will log a record to the Recruitment Calls related list on the Opportunity. Certain fields on the Recruitment Call record will be auto-populated based on the pre-defined fields in the Publisher Action.
 - b) Once the Recruitment Call Record is created, the workflow rules will trigger and if the criteria matches the associated Opportunity Call Made and Date of Last Call fields will be automatically updated. If a Peer Admission Rep was assigned the assignment will be removed once the call has been marked as made.



4. Unclick Hide Feed to be able to Show Feed
5. Select **Edit**



6. Navigate to the Qualifiers section
 - a. Enter the appropriate Qualifier (e.g., Prospect Qualifier, Applicant Qualifier)
 - b. Enter the appropriate Decision Factor (e.g., Prospect Decision Factor, Applicant Decision Factor)
 - c. Click Save at the top of the screen

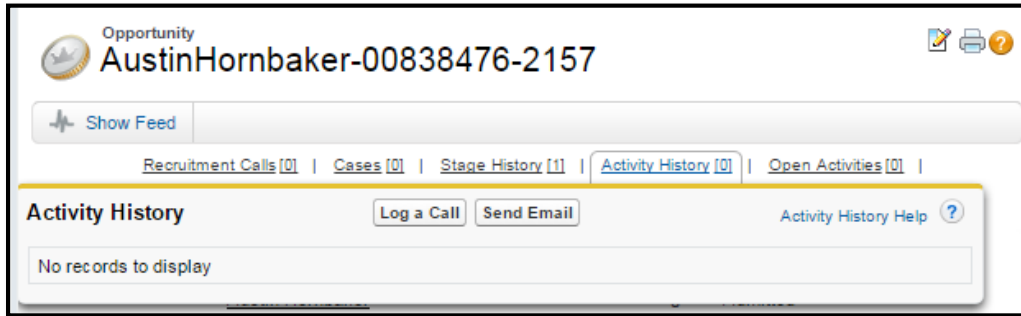


**Users can also double click the pencil icon in any field to enable edit mode.*

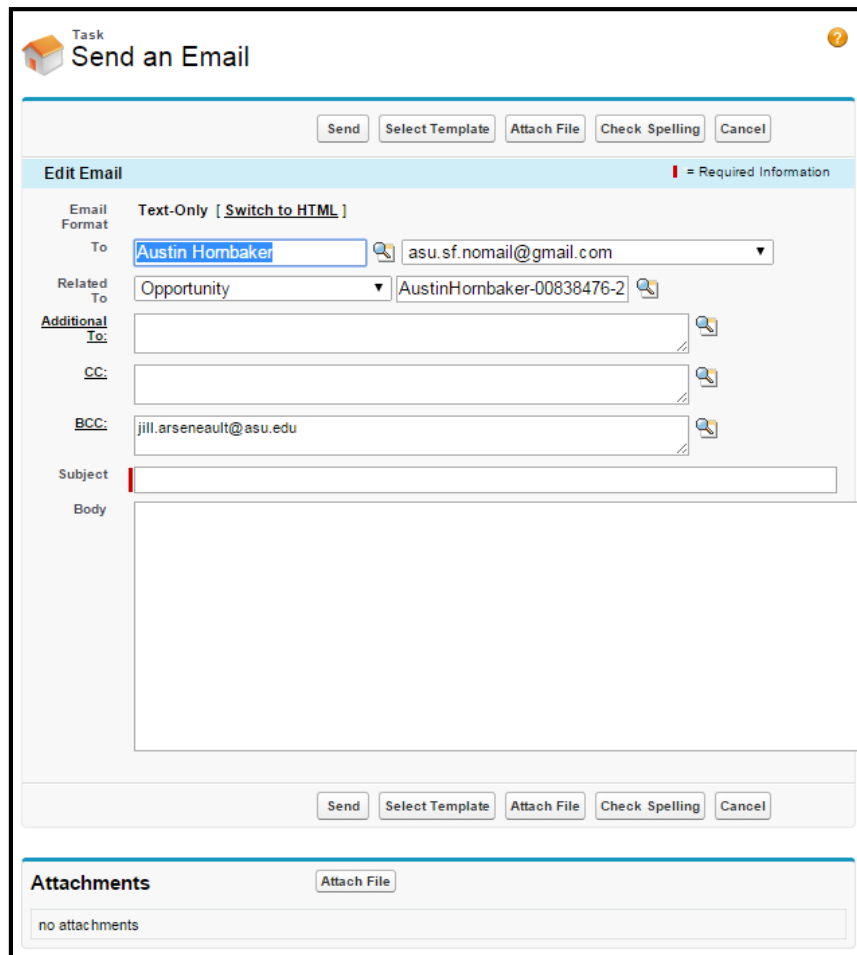


7. Send Follow-Up Email

- a. Hover over activity history in the related list section on the opportunity and create click on **Send Email** to send a new email.



- b. Please note this is a slightly different email interface than what is available on the Case. This dialog is ONLY used for outbound contact campaigns, a case should be logged to track any service issue or for emails responding to service questions.

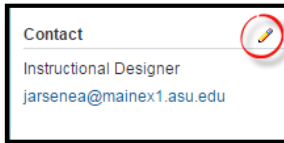


My Profile & Settings

Updating My Profile

Your user profile shows you how other people see you in ASU Connections.

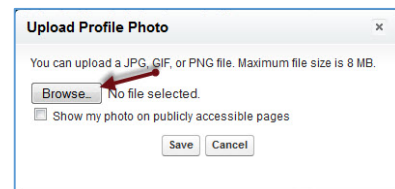
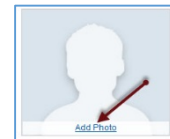
To update your profile, click on your name in the upper-right corner of the web browser. A drop-down menu will display three options. Select "My Profile."



On the left side, you will find an area for your contact information labeled Contact. Click on the pencil icon to edit this area. Click the **Save All** button in the pop-up window when you are finished

Adding a Photo

1. On the left side of the page, hover over the silhouette and click on **Add Photo**.
2. To add your photo, click on the **Browse...** button to select a file from your computer.
3. Once your photo file has finished uploading, you will see the name listed. Click on the **Save** button to keep this photo.



4. A preview of the photo will display. Move the dotted lines to adjust the thumbnail preview. Click the **Save** button when you have finished.



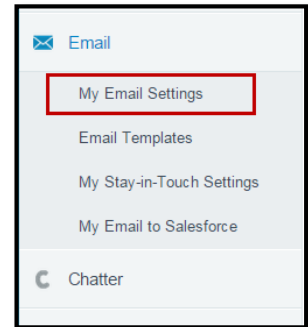
Updating My Settings

Click on your name in the upper-right corner of the web browser. A drop-down menu will display three options. Select “My Settings.”



Manage your Email Settings

1. Click on Email in the menu on the left side of the page.
2. Then click on My Email Settings
3. Outgoing Email Settings
 - A. Update your name for how you want it to appear on your outgoing email.
 - B. Set the default email you want to use as your return address, such as your college or department alias.
 - C. Add a signature.



My Email Settings

Outgoing Email Settings

How would you like your name to appear on your outgoing email?

Email Name

What email address would you like to use as your return address?

Email Address

Would you like to automatically BCC emails to your return address?

Automatic Bcc Yes No

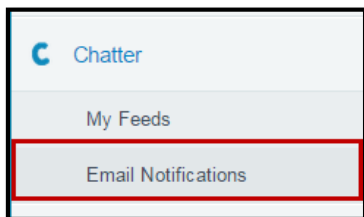
This signature will be added to your outgoing emails (1333 characters max):

Email Signature

4. Be sure to click Save. Save

Manage your Chatter notifications

To manage your Chatter notifications click on Chatter in the menu on the left side of the page.



1. Make any adjustments to your Chatter email preferences but do not turn all of the notifications off.

2. Be sure to click Save.



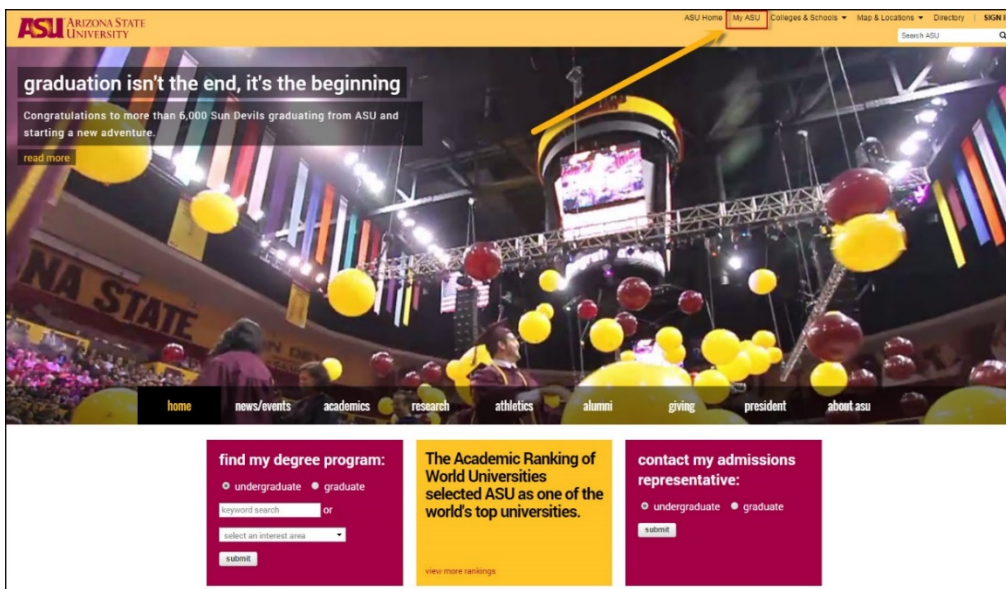
Appendix

How to log into Salesforce Production with ASU Single Sign-On (SSO)

ASU uses single sign-on (SSO) to access many applications and systems on the ASU domain, including our Customer Relationship Management system known as Salesforce. Once you sign into My ASU, you can access Salesforce directly from the [My ASU](#) homepage.

To access Salesforce from the ASU homepage, perform the following steps:

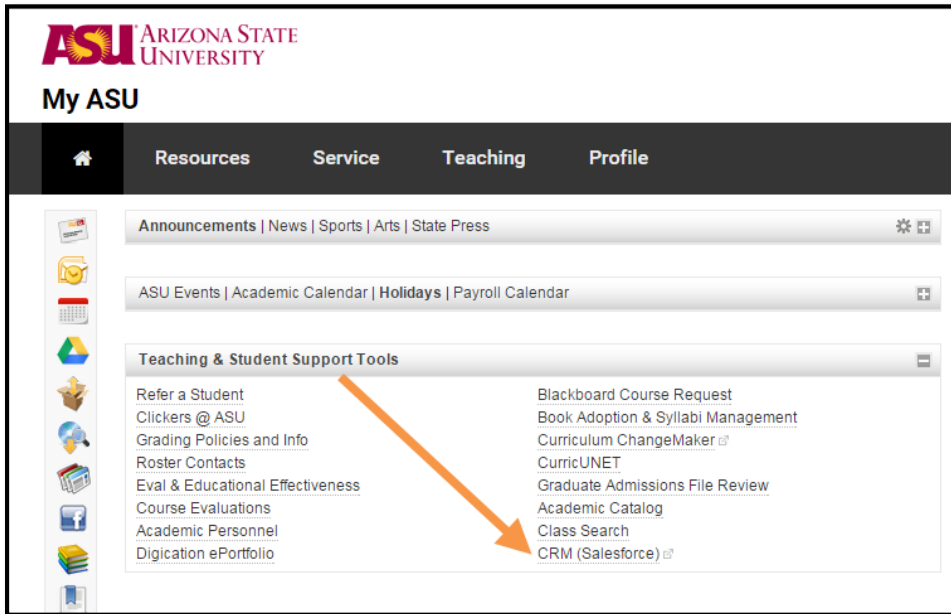
1. From <http://www.asu.edu>, click on **My ASU**.



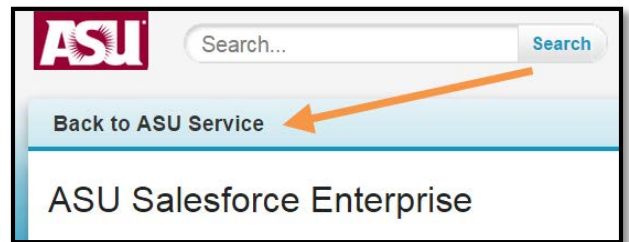
2. Type your ASURITE ID and password in the provided fields and click **Sign in**.



- Under the Teaching & Student Support Tools section, click **CRM (Salesforce)**.



- From the Salesforce Home Page, you can get to your cases by clicking **Back to ASU Service** in the upper left corner.



Note: As an alternative method to logging into Salesforce, you can access the site directly by going to <https://salesforce.asu.edu> and logging with your ASURITE ID and password.

User Scenarios

If you should come across a case without an Opportunity:

1. Check to see if the Opportunity exists & just needs to be associated to the case
2. If an Opportunity doesn't exist
 - a. Check to see if the Contact record is a duplicate
 - b. Create the opportunity and associate it to the case

Want More Training?

Please visit the UTO Training site at <http://links.asu.edu/utotraining>, then click on Salesforce Training in left margin to find more training documents like this one.