Salesforce CRM for Student Records

Various departments at SOM log their eMail and phone call notes with students in our Salesforce CRM. These instructions give you basic information about logging into Salesforce and recording information to the student objects.

Prerequisite

You must have a Salesforce account and work in a department that grants you access to the student objects in Salesforce. SOM IT onboards departments to Salesforce and creates access to the participants prior to training. If you are joining a department, you can request access through somit@yale.edu who will get permission from the stewards of the student data.

Step-by-step guide

LOGIN to Salesforce

1. Salesforce (SF) is a web based platform in the cloud. You access it via a web browser. Navigate to https://yale-som.lightning.force.com/ to login to Salesforce. The first time you login, you can create a bookmark in your browser. Our salesforce accounts are linked to the Yale Central Authentication system (CAS) so you will use your NETID and password to login.

2. Once you enter your credentials to login, your Salesforce home page will be displayed. Your home page is determined by your Salesforce profile. If your primary work is with Student Records, you will have the student dashboard displayed.

3. The student dashboard is a graphical chart which is derived from a salesforce report. The dashboard can be changed to represent any report or segment of the student population your group would like to see at a glance. SOM recommends working with the data for some time before deciding what you want to see at a glance on your home page.

4. The actions along the top of the screen will always be present. Under the blue SF cloud icon is the Application Navigator, we sometimes refer to this as “the waffle”. Next to the waffle is the name of the application group you are currently viewing. That group will dictate which objects you will see in your list along the top. In this sample, we are using the Global Studies Requirements application group, which has access to the students object. Next you will see the home tab/button. This will take you back to your dashboard screen. After the home tab is the list of objects you have access to as part of this application group.

5. You can begin using the data from the dashboard directly or by going into the Student object and looking at the views available.

Working with Objects

Objects are the basic structures in Salesforce. Each one represents a data view of something. Objects (like a student) can have relationships to other objects (such as course enrollments). An object contains fields that are meaningful to that particular object type. The student object has fields for name, degree program, expected graduation date and other identifying information such as the netid.

1. Select the Students object by clicking on it. Your screen will display the default view for that object, in many cases that is the ALL view.
2. When you click on the view name (in this case **ALL**), you will see a list of available views for this object. These views were created by SOM IT to serve the specific needs of our SF client community:

3. For our training purposes, we will select the view "All Active Students". When you click on this, SF will display this view, which happens to be a list of all active students sorted by Expected Graduation Year. Some students, such as PhD students do not have an expected graduation year yet, so those records will not have data in that particular field.

4. In the future we will have additional fields which can be added to the view. For example, we are currently developing a field to denote whether a student has met their Global Studies Requirement. As we add more information to an object, as long as your group has permission to see it, you will be able to see it and select it as a field to view.

**Adding Phone Calls, Notes, and eMail copies to Student records**

Most information fields on a record cannot be changed. They are changed by updating the source of the data. For example, if a student has a change of a first name or preferred name, that change should be made at the source, in the case of student records that is Banner. When the change is made there, it will find its way over to our staging tables and then to SF. The function of a CRM, or customer relationship management platform, is to add information about your interactions. In this case, as SOM staff members, we will be adding information about our interactions with students.

Interactions include:

- Phone call notes
• TO-DO Tasks related to the student
• Notes (public or private)
• eMail copies

Most of these interactions are considered to be shared publicly. In the case where a marketing and sales team are both working with a client, it is helpful to see who made the last phone call, and see copies of the eMails or proposals that have gone back and forth. Because each part of SOM has different functions with respect to serving the student community, we have some fields which are private and visible only to those on specific teams.

Open a student record by clicking on the Student Name field. From there you have the ability to add a variety of interactions which are attached to the student record you have opened.

Knowledge articles are available to walk you through most of these tasks.

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