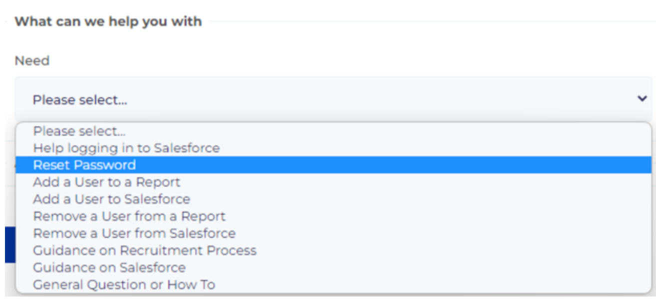
Salesforce Steps for Shared Engagement

Step 1: Required Password Reset

All existing Salesforce account passwords must be reset to access the new reports and receive your Salesforce account credentials. Use the new Salesforce Work Request form here, https://bowman.tfaforms.net/478 to request a ***Password Reset***.



Step 2: How to Access UK Online Salesforce

- Use the link provided in the program's UK Online lead report email to access the lead data on current prospects.
- In subsequent logins, you will only have to use your LinkBlue ID and password.

UK Online lead reports include leads submitted across all lead sources, including:

- UK Online web interest form
- marketing vendors' leads
- event attendance
- any lead manually entered the system

Reports now include (*3*) new fields: ***Lead Source, Student Status, and Recruitment ID.***

New UKO Lead Fields

Field Name	Definition
Lead Source	Where the prospect submitted the interest form.
Student Status	Where the (record) lead is within the admissions funnel (inquiry, prospect, the app started, app submitted, admitted, etc.)
Recruitment ID	A unique identifier of records housed within Salesforce

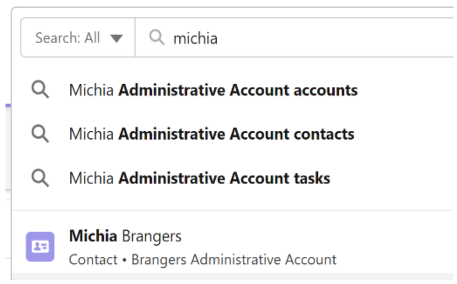
Step 3: Accessing/ Searching Program Lead Data

- Log into Salesforce and view your UKO Lead Report. Using the Reports drop-down in the top-level navigation bar. Once you open a report, click on the ***Recruitment ID*** to open each lead record.
- Alternatively, you can view individual records by using the Global Search Bar at the top of the page. Change the selection from "Search: All" to "Contacts." We recommend using the Recruitment ID for the best results.

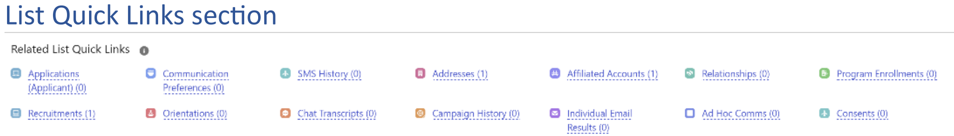
Note that phone number is not a required field, so this information may not exist in the record.

Global Search Bar

- Utilize the records first/last name, email, or phone number to search for a record using the Global Search function
- Select the **Contact Record** as shown below



- To navigate back to the recruitment record, Select "Recruitment" in the In the Related List Quick Links section



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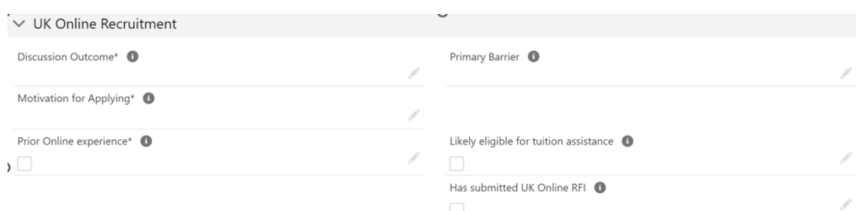
Step 4: Logging Interactions in Salesforce Recruitment Record

Programs can edit the "*UK Online Recruitment"* section to include valuable information unique to your program's recruitment efforts and information about the prospect. *Using the Recruitment Record also allows users to document engagement (i.e., Emails, calls, follow-up tasks, or notes specific to interaction), and select a follow-up date to revisit the task if needed.*

- Click on the "Recruitment ID" to open the lead account.
- Navigate down to the UK Online Recruitment Section on the page.

Lead Engagement Fields

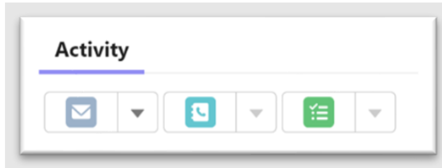


- To edit fields under the '*UK Online Recruitment*' section, use the edit button and select the appropriate response.
- Choose to save.

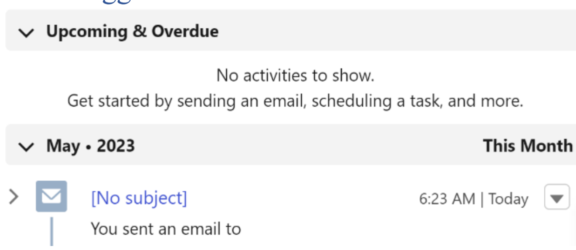
Communicating and Logging Interactions in Salesforce

- On the right side of the Recruitment Record, you will find an "***Activity***" area to log interactions such as email, call notes, and tasks.

Document Engagement



- Select the "*email*" icon (*the sender's email address will automatically populate in the "from" and "bcc" sections of the message*.)
- Type the body of the message.
- Select "***SEND***."
- Now the interaction is logged and saved to the Recruitment Activity log.



Logging Calls

- Select icon 
- Choose "Call" in the Subject Dropdown box.
- Enter notes/comments.
- Save
- Interaction will remain logged on to the record engagement history.

Entering Task or Follow-Up Needs

- Select 
- Create a subject for the task.
- Use the Calendar function to log the desired follow-up date.
- Save.
- Users will receive a notification when tasks are upcoming.

Discussion Outcome

After connecting with a prospect, please record their intention to apply.

- Interested
- Not Interested
- Need more time