

POI (Person of Interest) Data in Salesforce ^[1]

March 29, 2023 by [Melanie Jones](#) ^[2]

Person of Interest or POI data is used for Contacts with a non-traditional, close affiliation with CU. As of March 2023, POIs make up 32K+ Contacts.

Some POI Types include:

- Affiliates
- Security / Training
- Volunteer
 - Vol(unteer) Clinical

- Student Athlete
- Regent
 - FrmrRgnt (former Regent)
- and more

View [full details from Employee Services regarding POI Types across the campuses](#) ^[3].
Checkout an example of a POI Employment record as it appears in Salesforce below.



Employment
EMP-0000

Related

Details

Contact

Action

POI Type

00012



Original H

POI Type Description

Affiliate



End Date

▼ Job Details

Job Department Campus
#

4



Job Depart

Job Department Campus
Description

COLORAD



Job Depart
Description

Record Type

POI Employment



UIS Unique
Key

Created By

[UIS Integration Agent](#), 3/15/2023 1:42 PM

Last Modif

Employment #

EMP-0000

Source

Timeline & Impact

Timeline

POI data will be available when eComm specialists have the capacity for this change. We will time this project with others, including:

- [GeoCode Sunsetting \(May 1\)](#) ^[4] | **COMPLETE**
- [Business Unit & Preference Optimization \(June 1\)](#) ^[5] | **IN PROGRESS (Oct. 2023)**
 - *eComm specialists will take the lead on Report / Data Extension updates and cleanup due to Email Preference Changes (scheduled to take place in May-October).*

Impact

When this new POI data becomes available in Salesforce, Reports based on Employment data will need to be modified accordingly to capture POIs or not (depending on your use-

case). Failure to update a Report could result in a message going to a much broader audience (including POIs) by accident. While not as risky, failure to update Reports could also result in a missed opportunity of not communicating with POIs when you want to.

- Affected Reports include Reports based on Employment data, where the most granular filter includes *Campus* or *Department*. Employment Reports based on more specific criteria such as *Campaigns*, *Job Group Codes*, *Titles*, etc. will not be impacted.
- These nuances make identifying which Reports need to be updated difficult. **We know it will be less than 1,500 Reports to edit.**

Change Process | Identify Reports to Update

1. Determine Reports using Employment Record | *System*
 - Minus those that are more specific
2. Identify which Reports should include POIs and which should not | *eComm specialists*
3. Update Reports | *TO BE DETERMINED*
 - The system team is happy to help update Reports per eComm specialist direction.

POIs will automatically be included in Reports. Although unnecessary, you could achieve the same goal with the following logic:

Add a Filter for: *Employment: Record Type = POI Employment, Official CU Employment*

Want to exclude POIs?

Add a Filter for: *Employment: Record Type = Official CU Employment*

Fields >

Outline

Filters 3

Filters

Add filter...

Show Me All accounts

Last Activity All Time

Action not equal to D

Employment: Record Type equals Official CU Employment

Job Department Campus # equals 3

Contacts with Employment

To see the latest edits, refresh the preview. Refresh

Contact ID	Employee Preferred Name
0035G00001frvD0	Julianna

Filter by Employment: Record Type

Operator equals

Value Show Selected (1)

All

POI Employment

Official CU Employment

Self Reported Employment

"" (No Selection)

Locked

Cancel

Apply

IMPORTANT Using Employment data to create an Automation in Marketin Cloud? Be sure to include a Filter for: Employment: Record Type = Official CU Employment. Failure to do so will result in POI's getting included in the audience.

Display Title:

POI (Person of Interest) Data in Salesforce

Send email when Published:

No

Source URL: <https://www.cu.edu/blog/ecommerce-wiki/poi-person-interest-data-salesforce>

Links

- [1] <https://www.cu.edu/blog/ecommerce-wiki/poi-person-interest-data-salesforce>
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- [4] <https://www.cu.edu/blog/ecommerce-wiki/geocode-salesforce-sunsetting-2023>
- [5] <https://www.cu.edu/blog/ecommerce-wiki/preference-and-business-unit-optimization>