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Intro to the Integrated Online Services Salesforce Org [1]

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The IOS Salesforce org [3] supports Marketing, Recruiting, and Admissions departments to facilitate interactions with Leads and Applicants.

Objects are groupings of data or "fields" related to a specific grouping such as Contacts or Applications. Fields are individual data on an object such as name or application status.

All details about the Lead are stored in the contact record. All other education-related data is stored in objects related to the contact record as follows:

- Applications: Started, Submitted, and Admitted from Source Application Programs and the Student Information System
- Program Enrollments: Program, Term, Standing
- Course Connections: Any Enrolled Course, Term, Standing

Enrollment Navigator refers to anyone giving pre-application or application support. **Success Coach** notes any post application or enrollment support. **Activity** is an object that shows different interactions with the lead such as calls or emails

As a user, you should center yourself around a contact record. You can identify where a lead came from using any combination of attribution details. If you are a part of the Advising team, you will want to fill out either the “Enrollment Navigator” or “Success Coach” fields to note your ownership of the record. You will log different “Activities” to show your interactions as you work the lead. After every interaction, you should update the “Recruitment Status” and “Navigator Notes” fields on the contact record.

Primary Sections and Fields for Use:

- **Contact**
    - ?Personal Details
        - Recruitment Status
            - This is where the user will note what stage in the recruitment process the Lead is
        - Navigator Comments
            - An open text field for the user to make nuanced notes about the Lead.
    - Academic Details
        - Program of Interest
            - Marketing label for the specific plan or program
        - Specialization
            - Marketing label for the specific sub plan
        -

Primary Academic Program
        - Official program name populated when the application is started, or program enrollment submitted
    - Entry Term
        - Populated from the application or enrollment record.
- Attribution Details
    - Source Channel
        - 1st level marketing attribution
    - Lead Source
        - 2nd level marketing attribution
    - Page Source
        - Which page URL a lead came from
    - Last UTM Values
        - Specific marketing attribution from the most recent ad touch
    - First UTM Values
        - Specific marketing attribution from the first ad touch only

After requesting access and provisioning into the org, check out this repor [4]t to see which of your campus programs is supported by IOS. All active programs and subsequent levels of support are visible.

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