Introduction to Contact Management in Salesforce

Contents

What is Salesforce?

Salesforce is a cloud computing constituent relationship management (CRM) platform. If you've not used a CRM system before or you're not sure what they do then you may wish to complete the Trailhead '[Salesforce User Basics]' module, which provides some background information. (Trailhead is Salesforce's training website, which you can access with your Salesforce login.)

Salesforce was originally a platform primarily for sales-focussed organisations, and much of its branding, terminology and training materials are designed accordingly. However, many of the technologies that Salesforce offers also have the power to improve student interactions and management of student data, so LSE is pioneering its use in the UK Higher Education sector.

Salesforce works on the concept of ‘apps’. Each app is used to perform a specific function, just like on a smartphone. Whereas on your phone you might have apps for email, maps, web browsing, etc, in LSE’s Salesforce environment there are apps for event management, marketing communications, student admissions, and many more. Some of these apps are built by Salesforce, some by third party suppliers and some have been built or customised by LSE’s ARD Systems team.

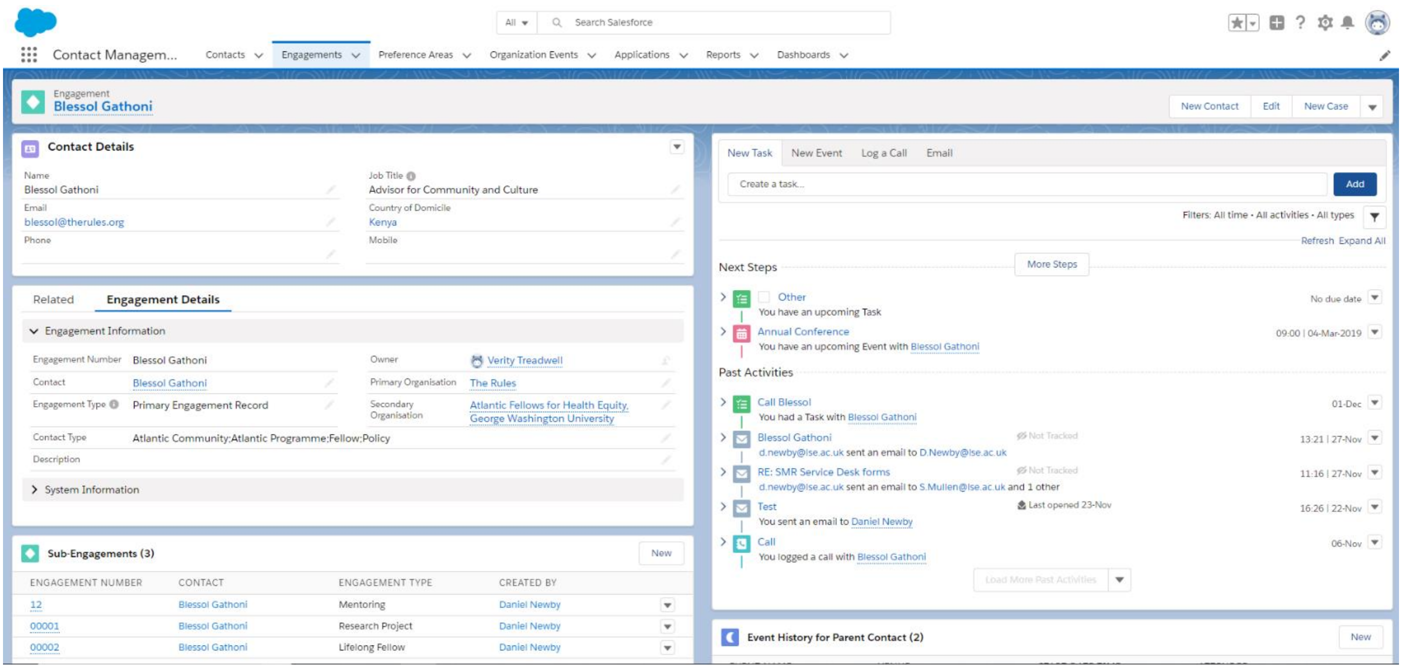
What is Contact Management?

Contact Management is an app that enables users to record key information about people that interact with a particular department or office at the School, and store details of specific interactions. These interactions could include, for example, event attendance, applications submitted or memberships of boards or steering groups. You can also use the Contact Management app to log emails, calls and meetings.

What’s the point?

By storing all information about an individual in one place teams have a ‘single source of truth’ showing accurate, up-to-date information to all members of a team. This reduces human error and duplication of work, and the additional data collected can be used for measuring KPIs, sending targeted marketing campaigns, analysing business needs, etc.

Putting data into Salesforce also creates wider benefits for people who interact with multiple departments at LSE and makes it much easier for the School to meet its obligations under the General Data Protection Regulation (GDPR).



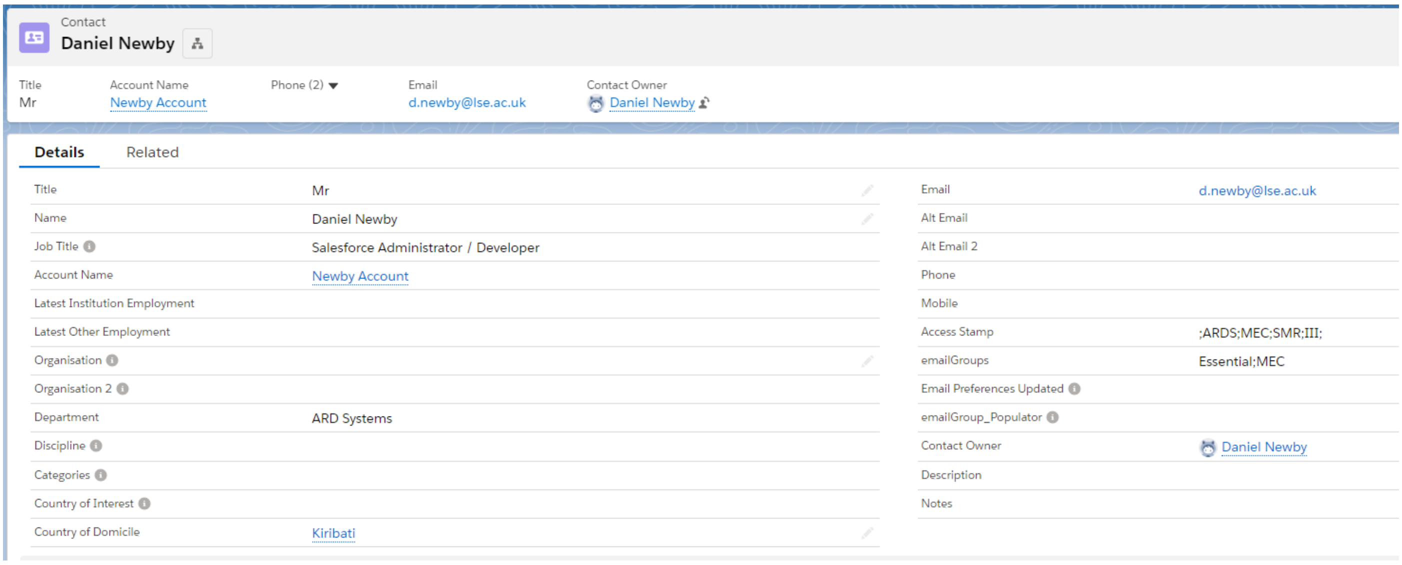
1 The Contact Management app

Contact Management key concepts

Contacts and Engagements

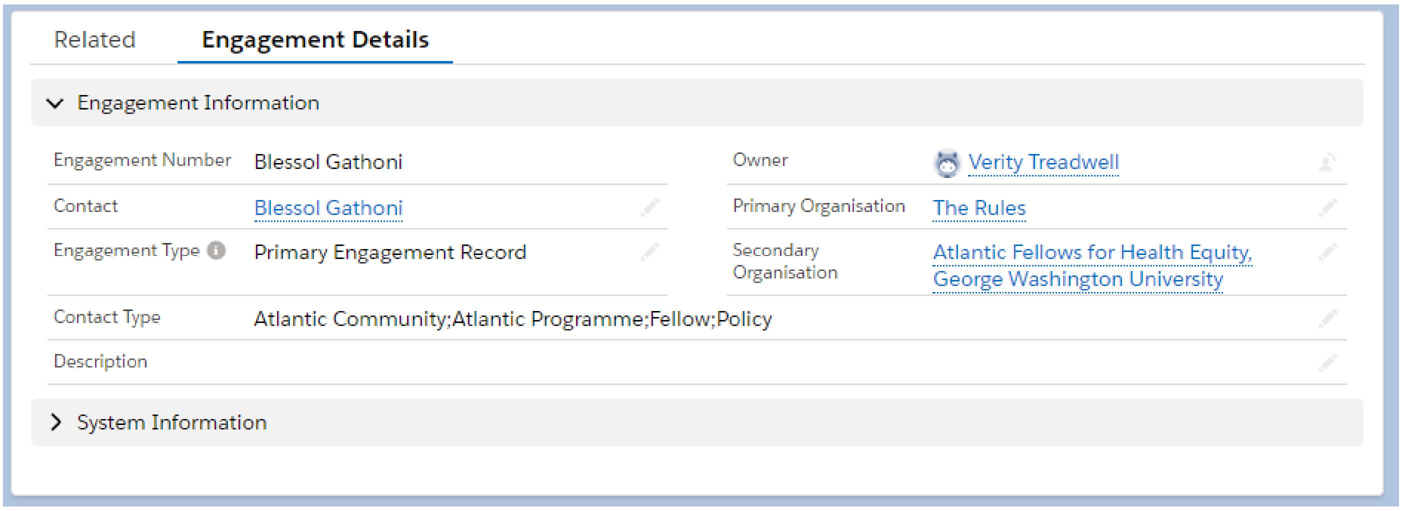
For contact management most information about individuals is stored on one of two records: Contact records or Engagement records.

Contact records contain basic personal details about an individual such as their name, email address, country of domicile etc. In LSE’s Salesforce environment each individual should only have one Contact record even if they interact with multiple offices at the School, so there is likely to be information on Contact records that is not relevant to your team. You will not be able to see all the data stored on an individual’s Contact record.



2 A Contact record

Engagements records, by contrast, contain information specific to a particular team at the School, such as what type of contact they are (e.g. student, staff, media contact) and how they have interacted with that team. Teams will usually only be able to see Engagements related to their team.



3 An Engagement record

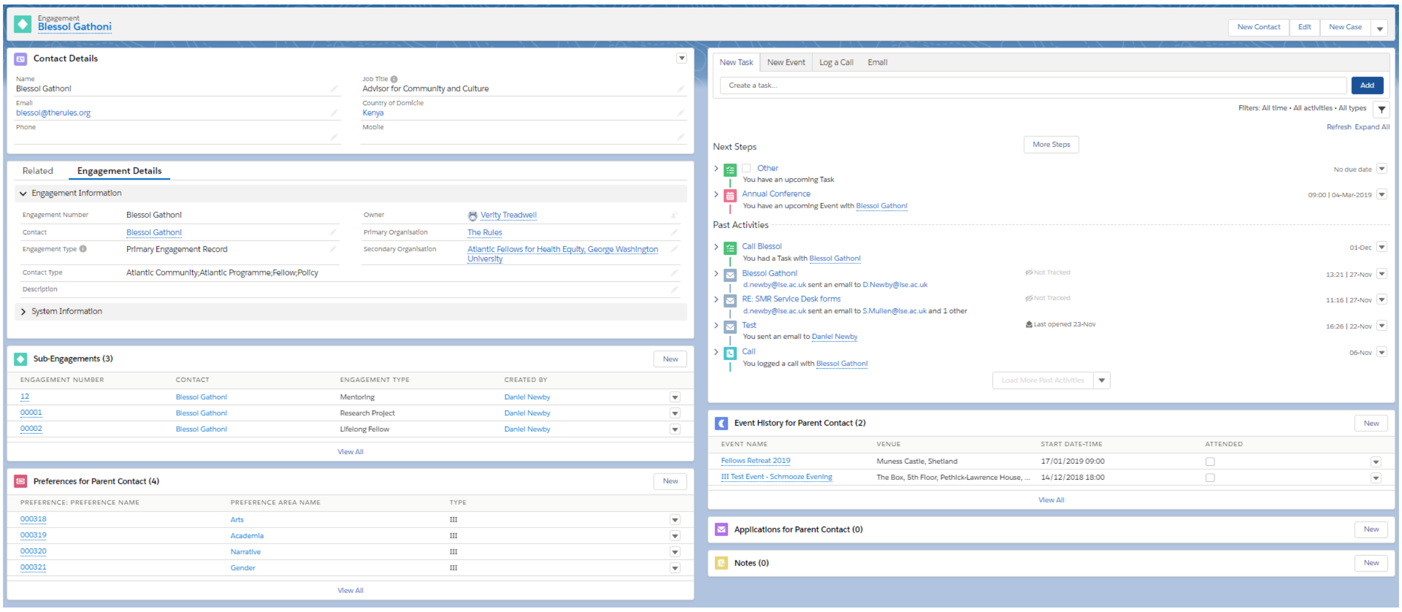
Reports and Dashboards

One of the key strengths of Salesforce is the ease with which it is possible to create and view reports on the data that your team uses. These can be used for at-a-glance reports, measuring KPIs, sending targeted email campaigns and much more. **Reports** look at individual statistics while **dashboards** group together data from multiple reports into a single view.

4 A dashboard showing data from several reports

Other types of records

While some interactions are stored directly as Engagement records others, such as event attendance, applications submitted and keywords, have their own specific types of records. Although not part of the Engagement record, they appear on the same page when viewing an Engagement.



5 Engagement record page showing related Sub-Engagements, Preferences (keywords), Activities, Event History, Applications and Notes

How to…

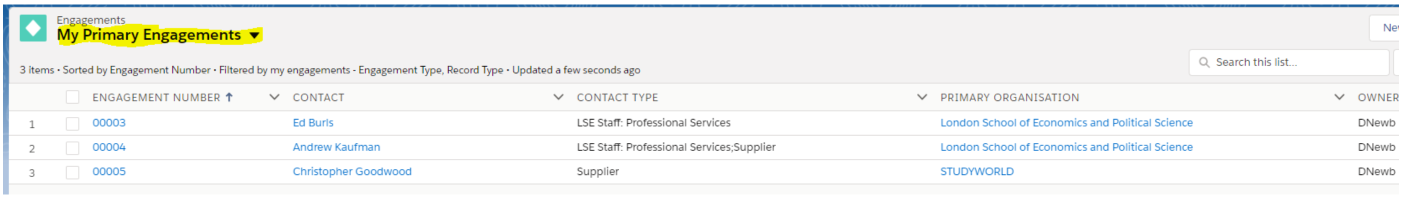
View an overview of interactions with a contact

The best place to see all information about an individual is on their primary Engagement record page. There are two ways to get there:

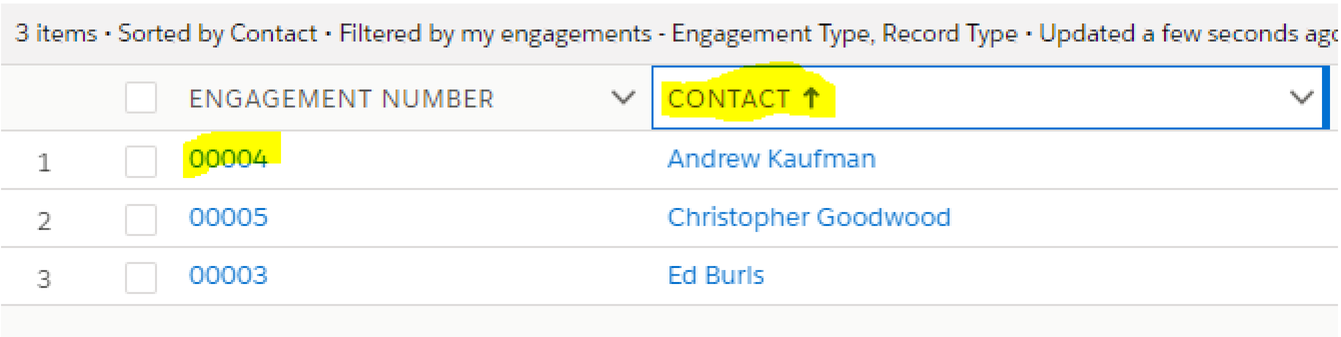
Option 1 – via the Engagements tab

1. Click on the Engagements tab.

2. A list of 'Recently Viewed' Engagement will appear, but you will only be able to see the records numbers. Click on 'Recently Viewed' and select a different list view to see relevant Engagements.

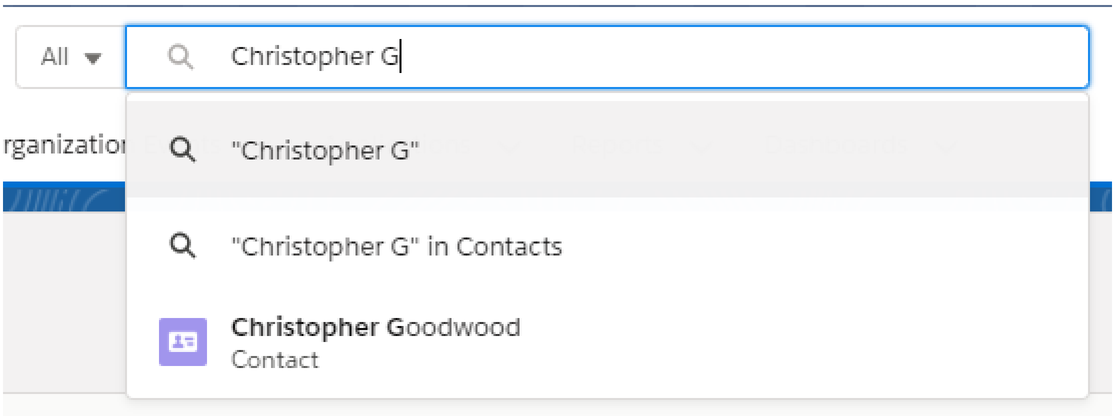


3. Find the individual contact you are looking for - you can sort the list alphanumerically by clicking on any of the column headings, e.g. contact name. Once found, click on the Engagement Number to open the Engagement record page.

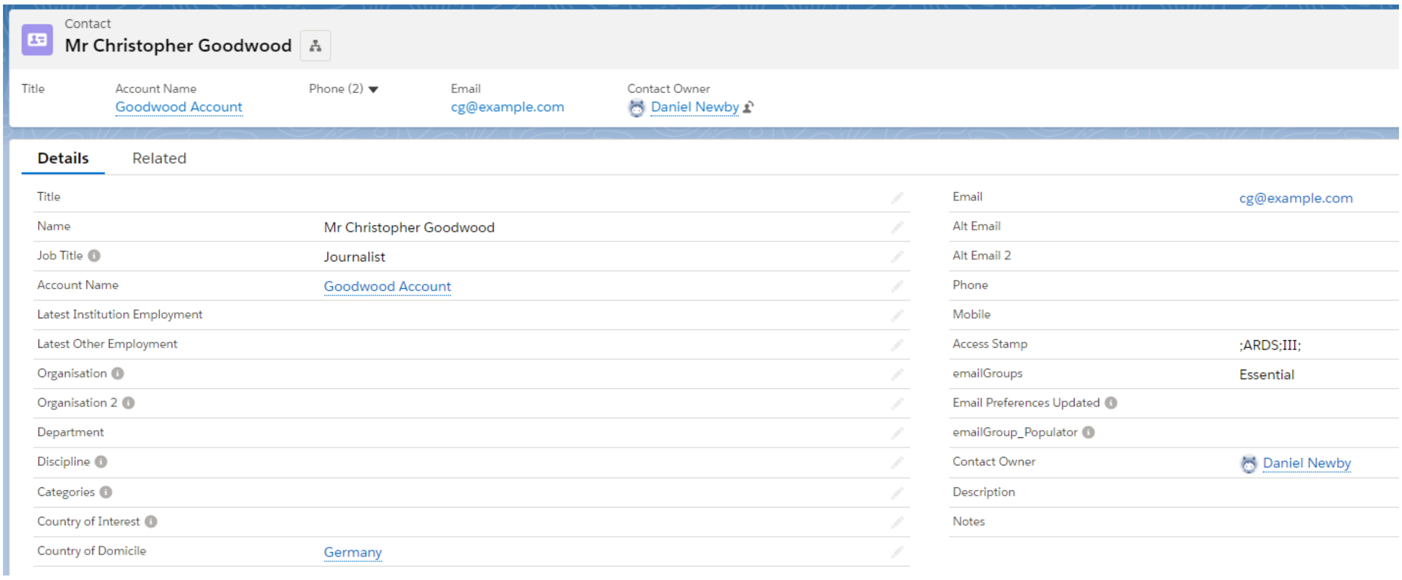


Option 2 – via the search bar and Contact record

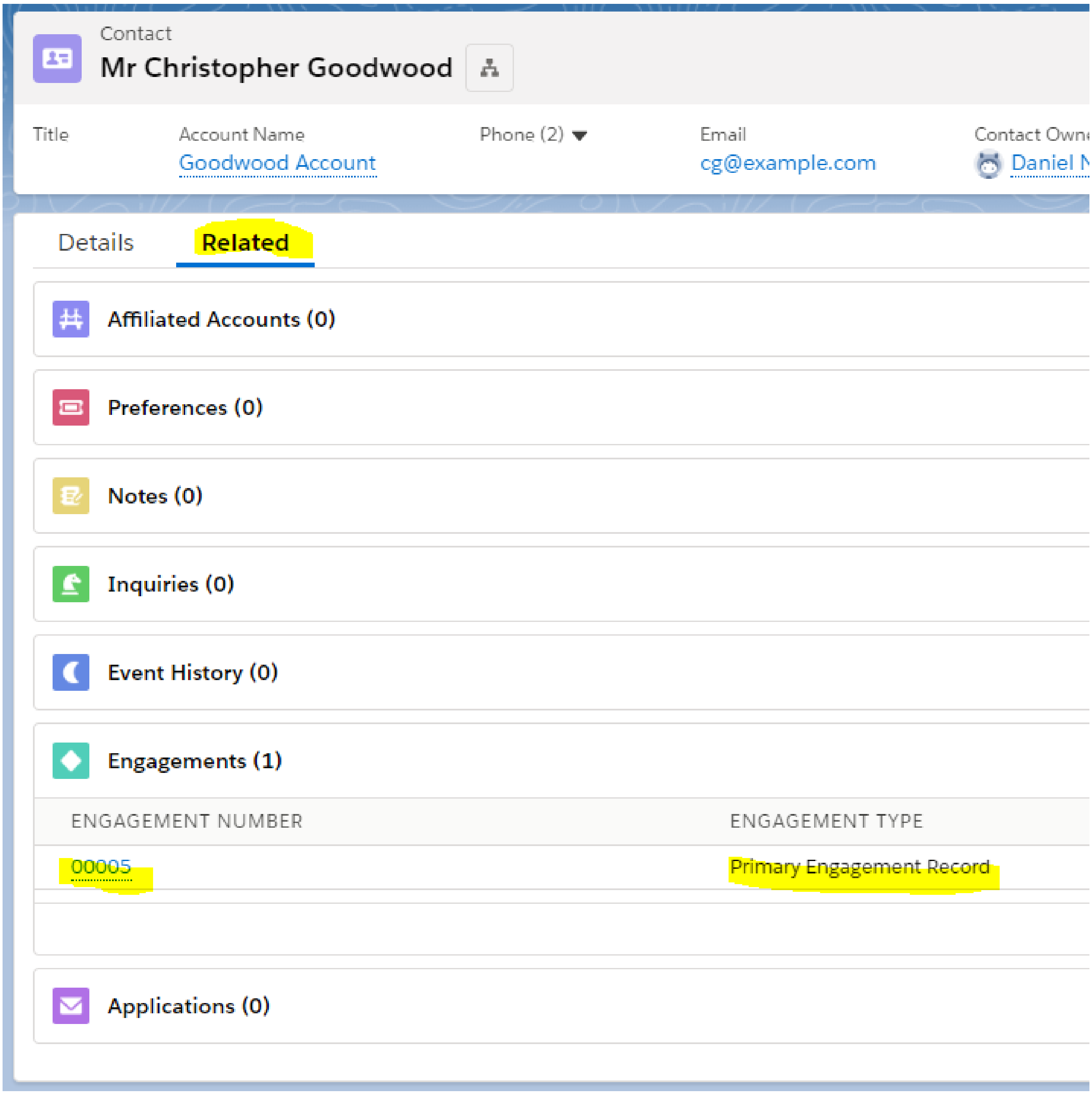
1. Type the name of the person you are trying to find into the global search bar at the top of the page. As you type, the person's name will often appear below the search bar. If it does, click on it. If not, finish their name, press 'Enter' on your keyboard and find the contact in the search results.



2. The individual's Contact record will load. Note you can see personal details such as name, email address, job title etc, but you will not see any information specific to your team.

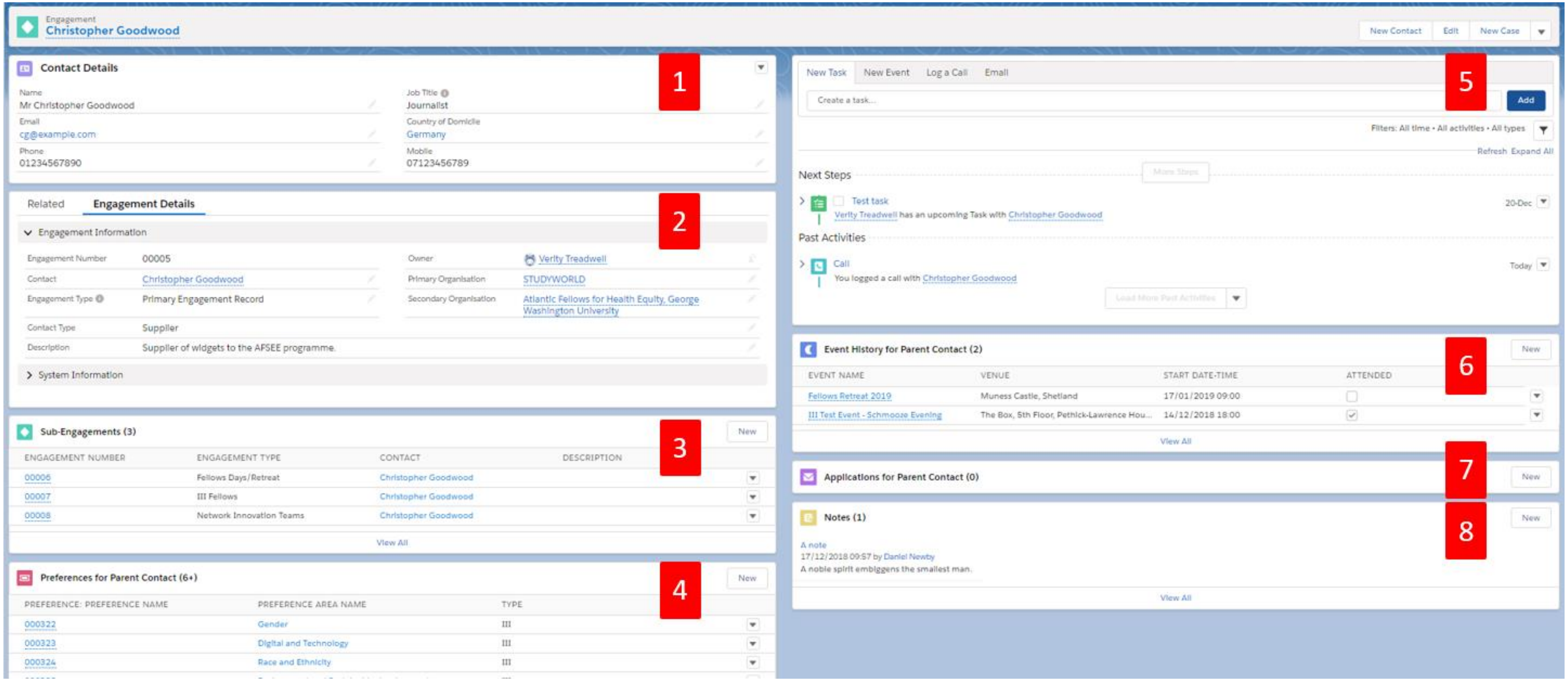


3. Click on the ‘Related’ tab, scroll down to ‘Engagements’ and then click on the Engagement Number to open the Engagement record page.



The Engagement record page

Once you've opened an Engagement record page you'll see that there's quite a lot going on. There are various boxes with different types of information. See below for details.

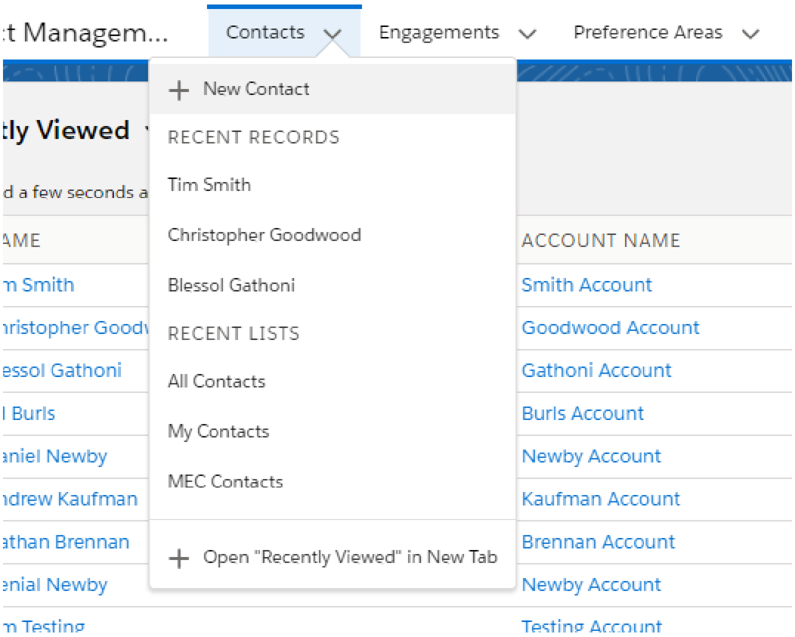


1. **Contact Details.** Some basic contact details, taken from the individual's Contact record. Think carefully before editing these details as this information could be used by other teams.
2. **Engagement Details.** This is the actual Engagement record. Note the Engagement Type – this should usually be 'Primary Engagement Record'. Any additional Engagements this contact has will be listed under 'Sub-Engagements'. Engagements are always associated with an individual Contact record and can be associated with up to two organisations. Engagements also have an 'Owner'. If your team has contacts that 'belong' to individual team members then that team member is the owner. By default, the person who creates the Engagement record will be the owner, but this can be changed after creation.
3. **Sub-Engagements.** Here are recorded interactions with a contact that don't fit into any of the other categories.
4. **Preferences.** In the context of Engagements, Preferences are 'keywords' that you might use to associate contacts to a particular theme or area of interest. If the contact has agreed to be on your mailing list you can use preferences to send targeted emails based on contacts' areas of interest.
5. **Activity History.** The Activity History feed can be used to log upcoming or past calls, emails, meetings or tasks associated with a contact who has an engagement with your team. If you us the Lightning for Outlook add-in then meetings and emails you log will appear here. Click on the 'Email' tab to send an email that will be logged against the Engagement record.
6. **Event History.** If your team manages events using Salesforce then any events the contact has registered to attend will appear here.
7. **Applications.** If your team receives applications using Salesforce then any applications the contact has started will appear here.
8. **Notes.** Notes stored against an Engagement record can only be seen by your team.

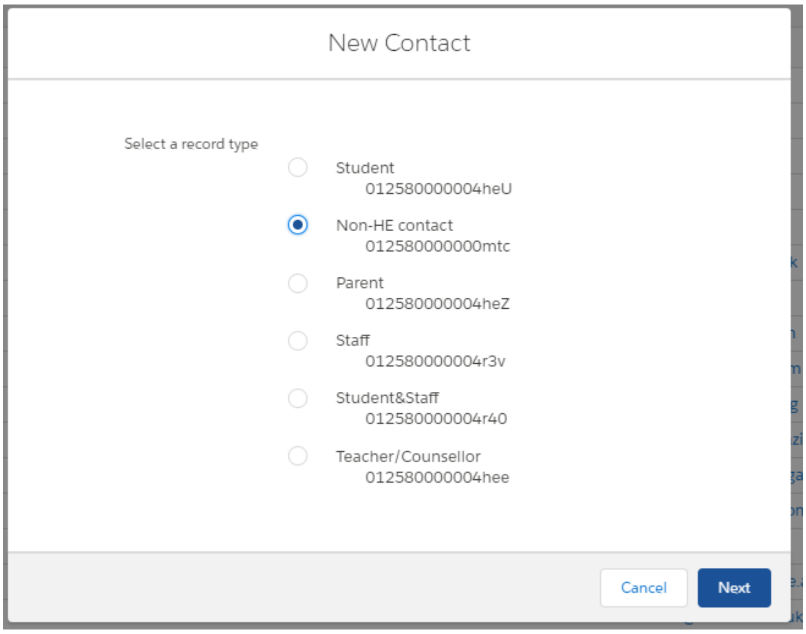
Create a new Contact and Primary Engagement

To add a new contact to the Salesforce database:

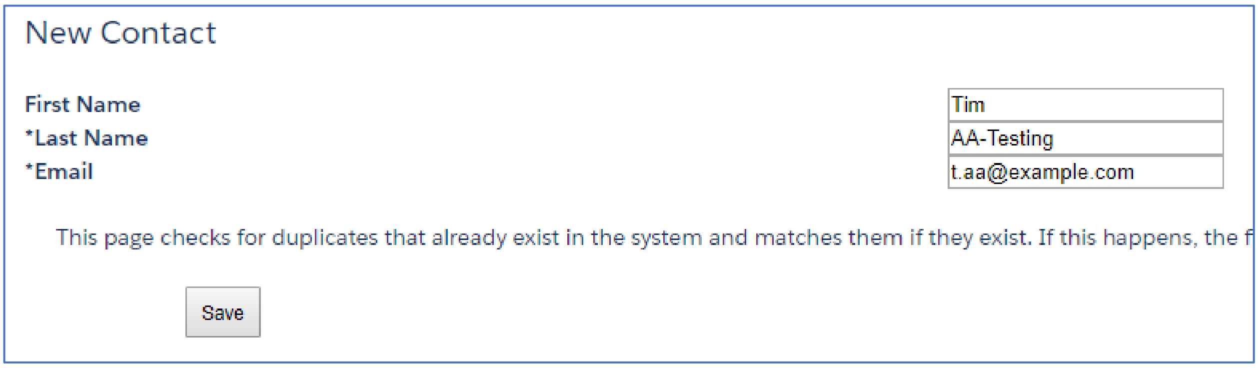
1. Click on the dropdown button on the 'Contacts' tab and then click 'New Contact'.



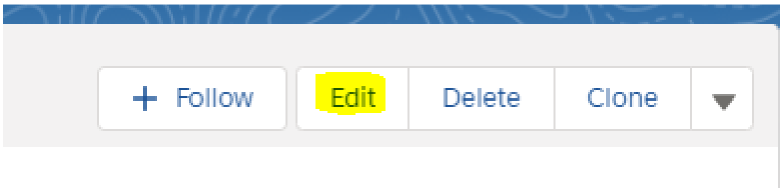
2. If you are asked to select a record type, choose the most appropriate type (usually 'Non-HE contact') and then click 'Next'.



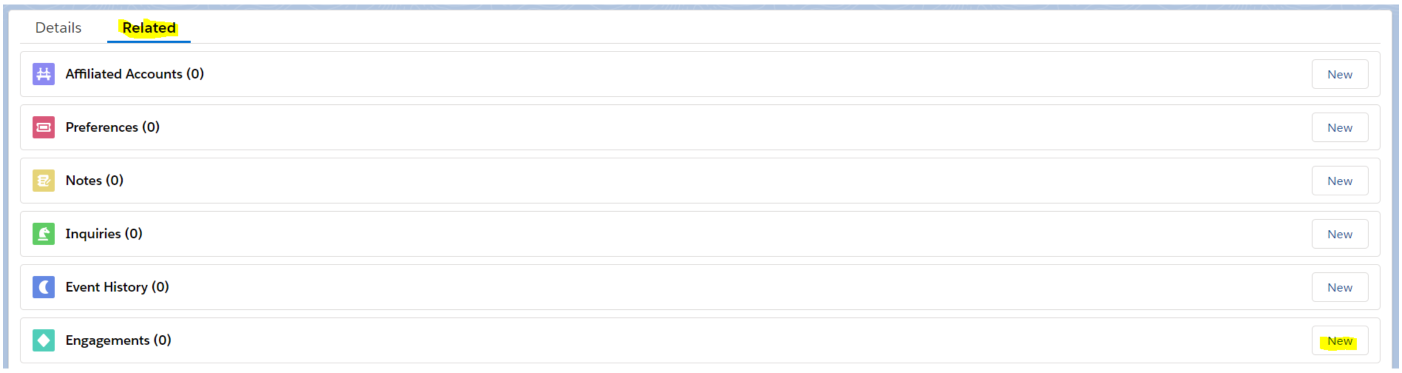
3. On the following page enter the name and email address of your contact. Make sure you enter these correctly as this information is used to check whether the contact already exists in LSE's Salesforce database. Click 'Save'.



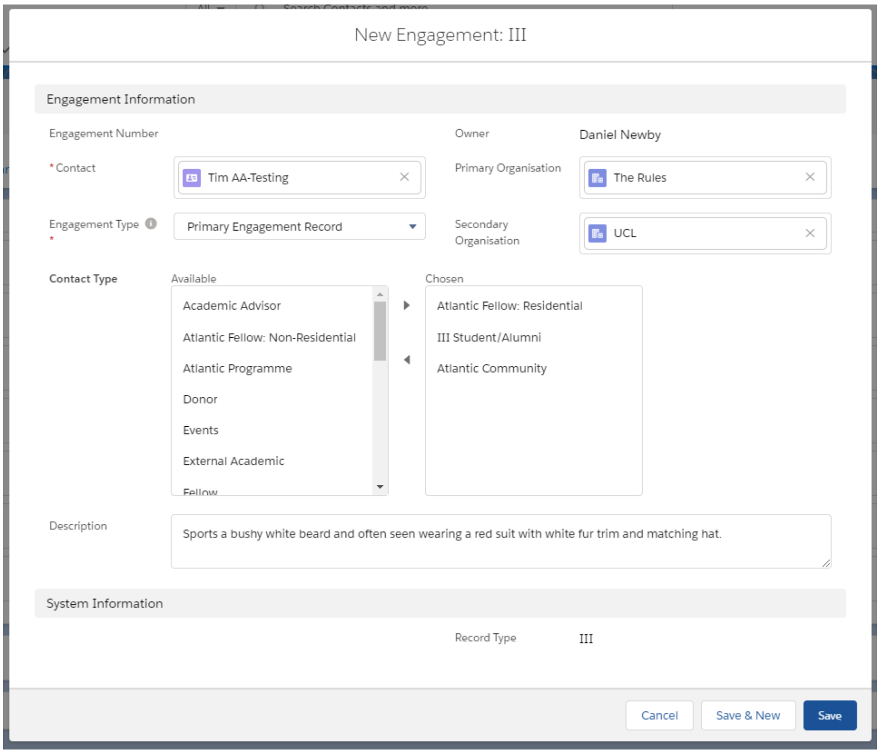
4. When you click 'Save' a check will run to see if the contact already exists in the database. If it does, you will be granted access to the individual's Contact record. If not, a new Contact record will be created. In either case, once the Contact record has loaded, click 'Edit' to add any additional details about the contact, such as job title, phone number, date of birth, etc, and then click 'Save'.



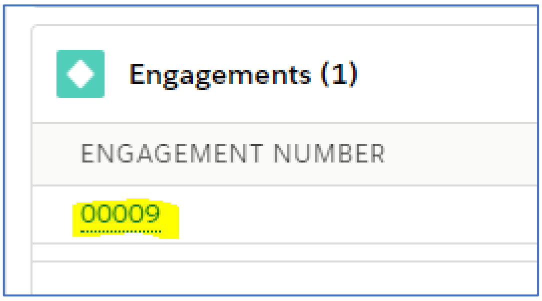
5. Next you need to add the Engagement record for the new contact. Click on the 'Related' tab then click 'New' next to Engagements.



6. A box titled ‘New Engagement’ will open. Note that the Contact will be your newly created contact, and the Engagement Type should be ‘Primary Engagement Record’. For Contact Type, add as many options as necessary by using the arrows. You can associate the Engagement with up to two organisations. Start typing the name of an organisation to search for it, and click on it once it appears. If it’s a new organisation you may need to click ‘New Account’ to add it to the database first. When you have finished, click ‘Save’.

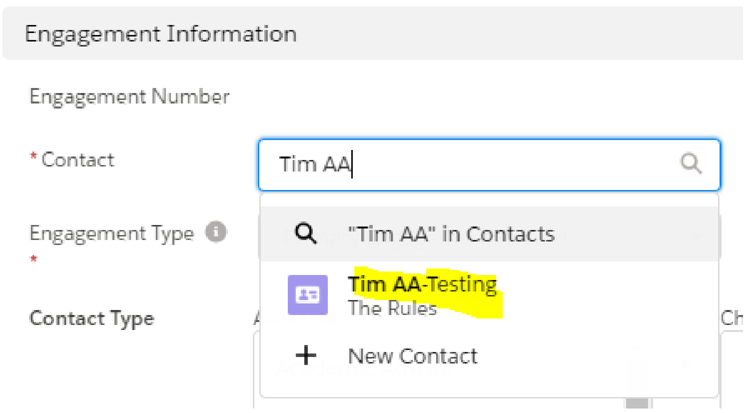


7. Click on the Engagement Number to view your newly created Engagement record.



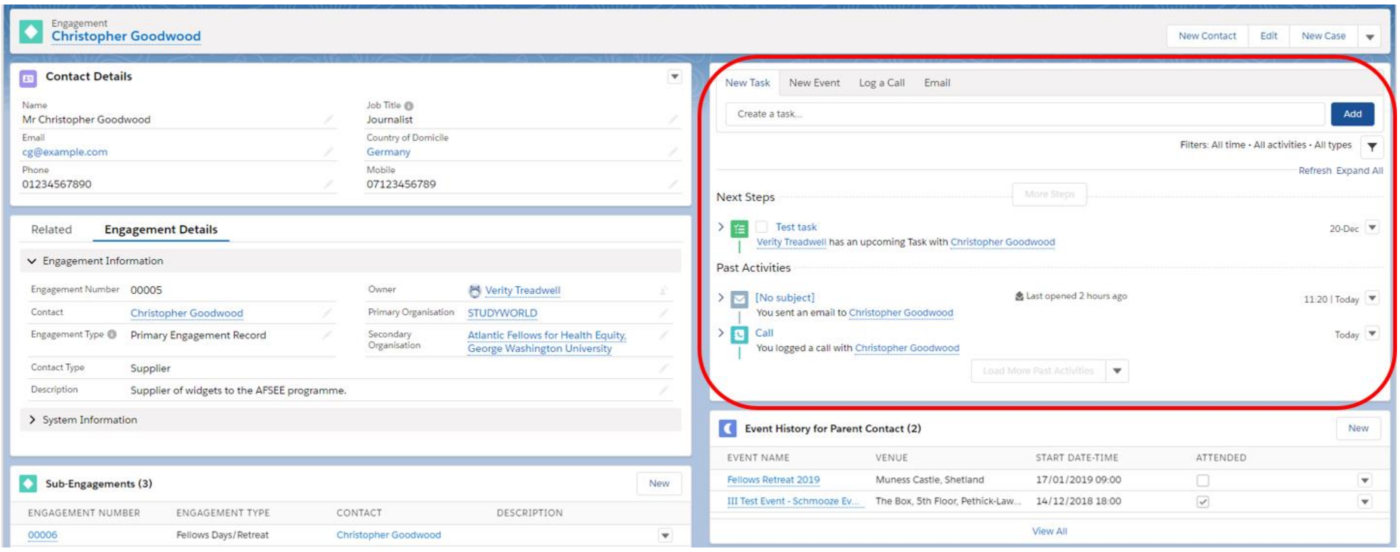
Tip!

If you know that a Contact record already exists for someone and you just want to add a primary Engagement record, you can skip straight to that step by clicking the dropdown button on the ‘Engagements’ tab and then clicking ‘New Engagement’. You’ll need to make sure you associate your new Engagement with the right Contact by typing their name in the ‘Search Contacts’ box and then selecting their Contact record when it appears.

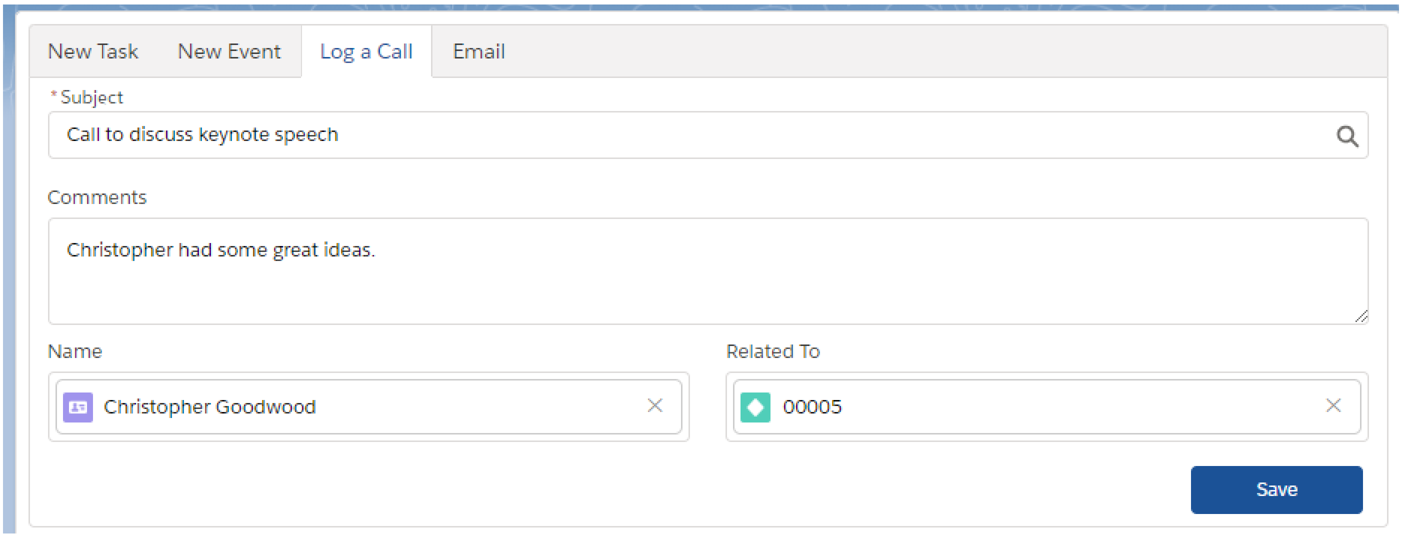


Log an Activity with a contact

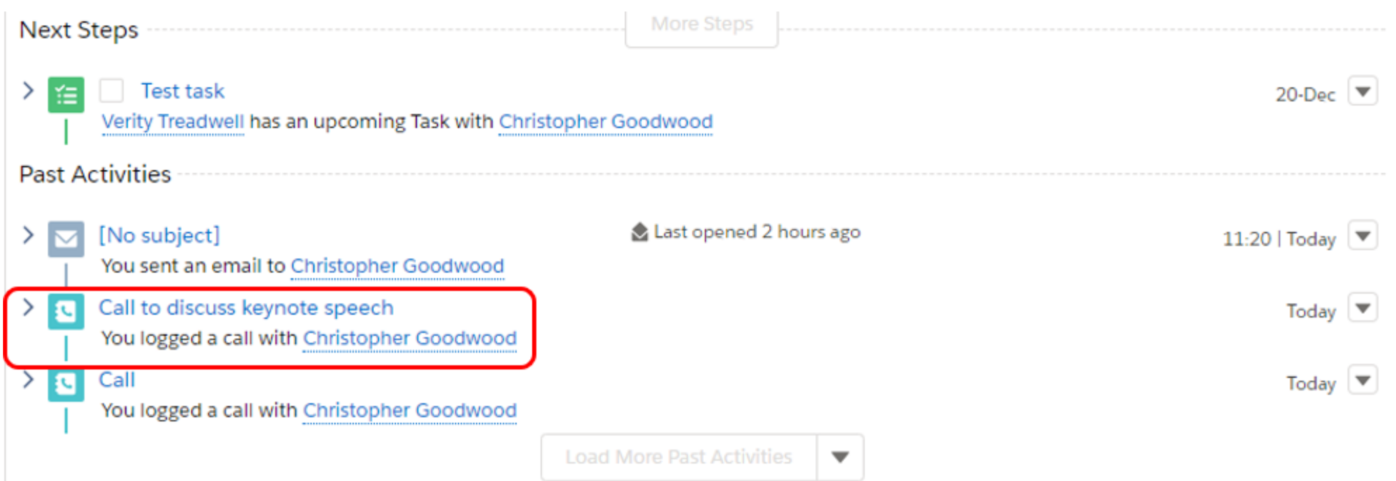
1. Follow the instructions above on how to view an overview of interactions with an contact to open the primary Engagement record page for the person you wish to log an activity for. The Activity History box is at the top right of the Engagement record page.



2. To log an Activity, click on the relevant tab, add any details you need and click 'Save'.



3. Any Activities you log will appear in the feed.



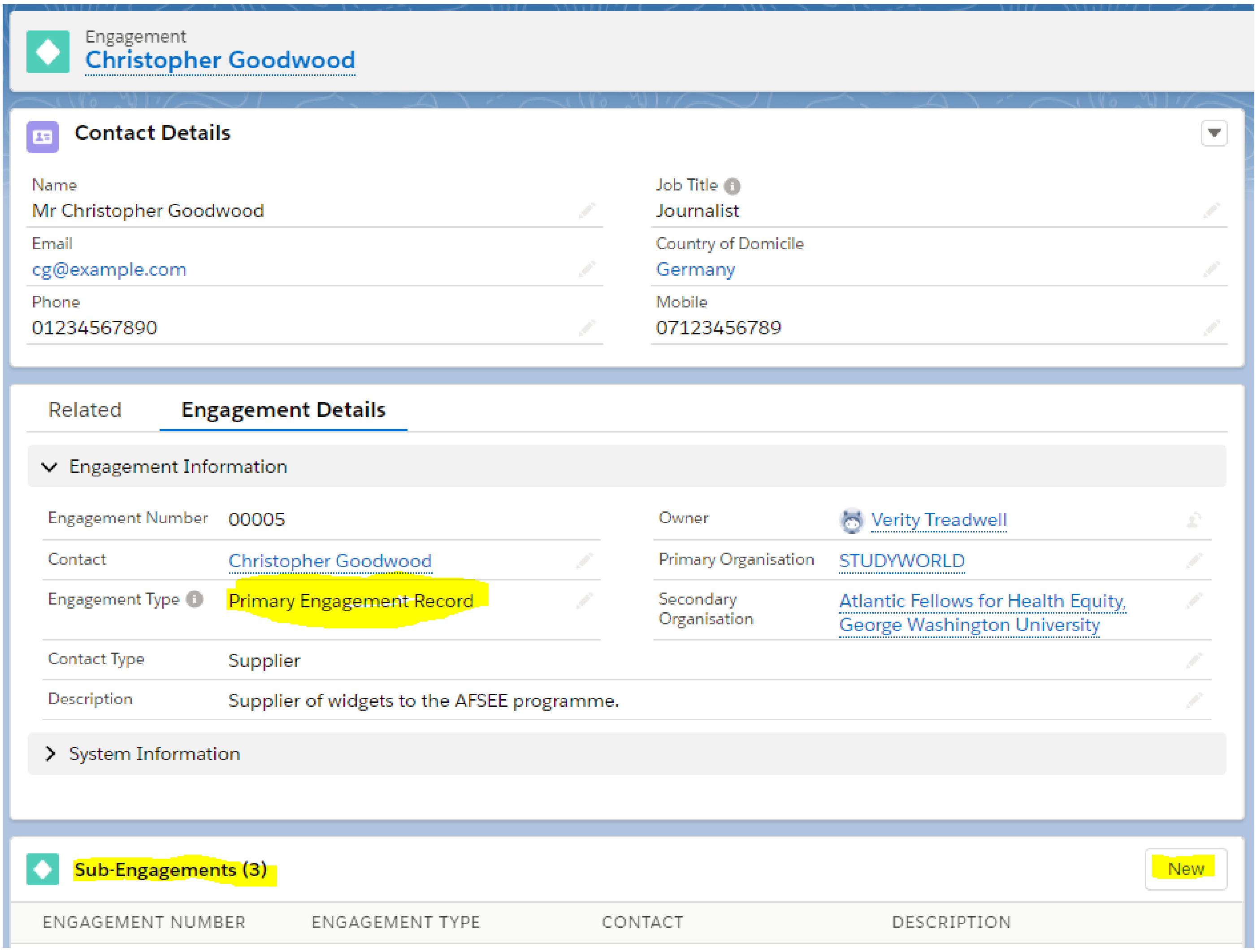
Notes!

- You can use the ‘Email’ tab to send emails that will be logged against the Engagement record. If you have set up Salesforce to send emails through Outlook 365 then these emails will appear in your sent items.
- If you use the Lightning for Outlook add-in to log emails and meetings in Salesforce, then they will appear in the Activities feed.
- The ‘New Event’ option is for meetings, e.g. those arranged in Outlook, rather than managed events such as conferences or public lectures.

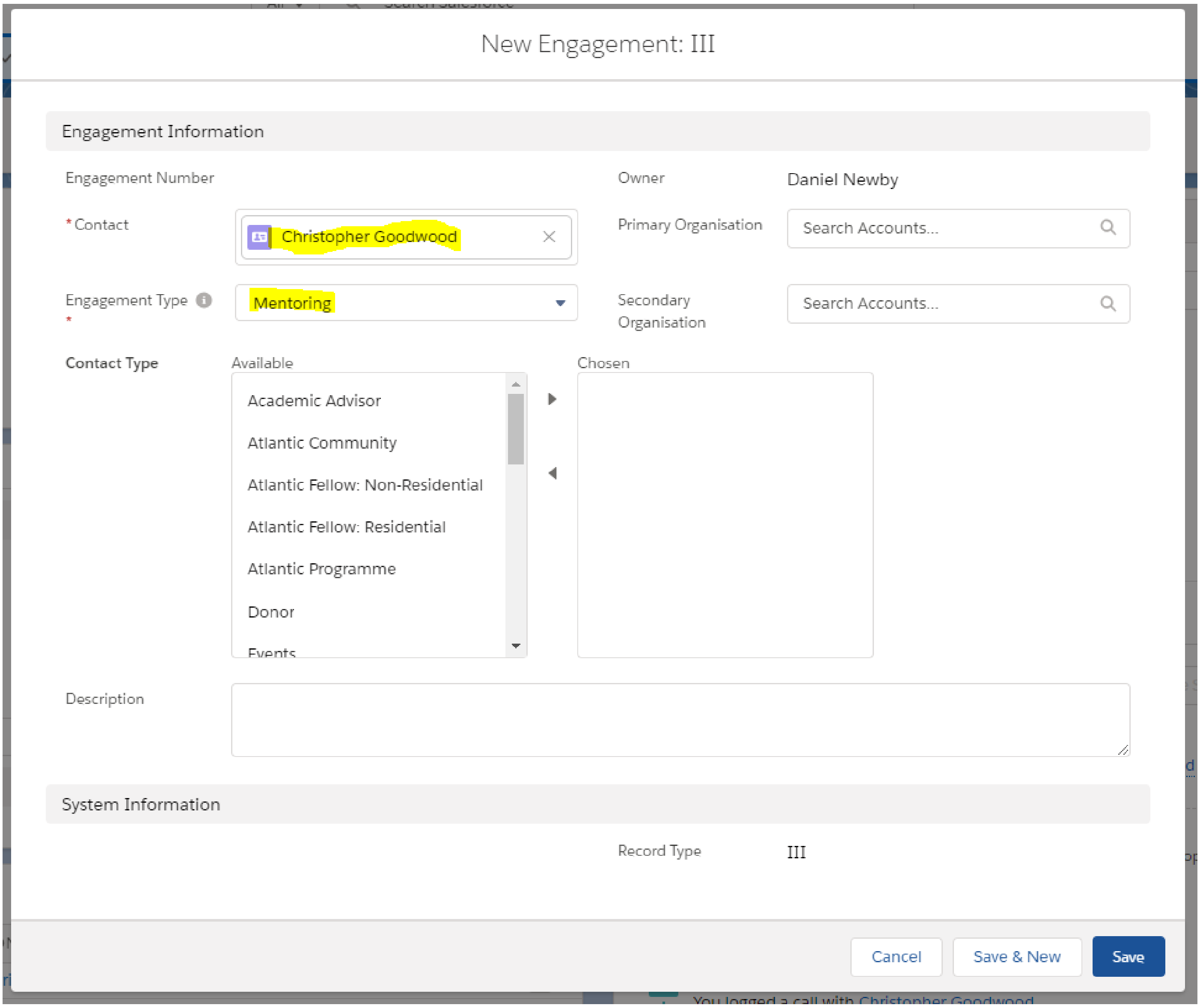
Add Sub-Engagements to a primary Engagement record

If you want to log an interaction with a contact that doesn’t fall into any other category you can use Sub-Engagements. To add a new one:

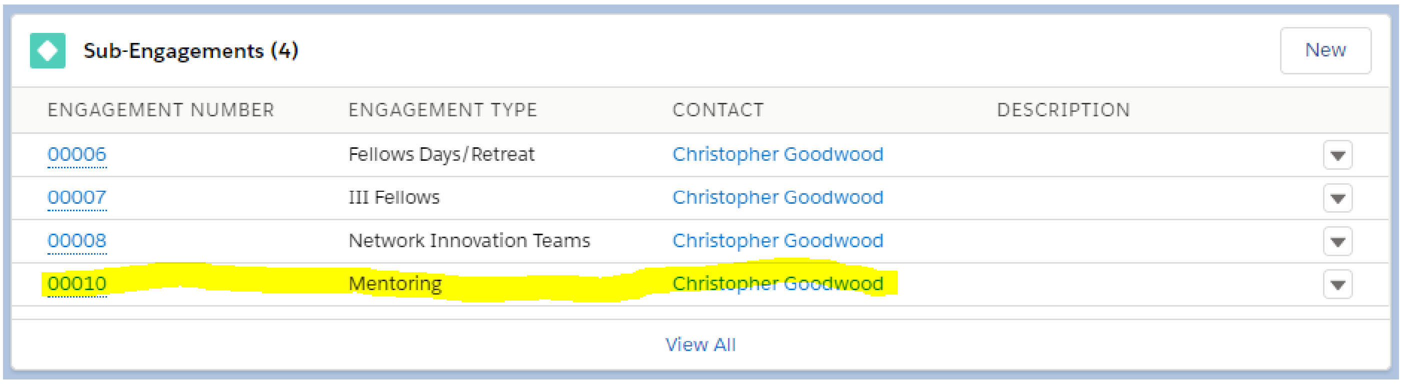
1. Follow the instructions above to open the primary Engagement record for a Contact, then scroll down to ‘Sub-Engagements’ and click ‘New’.



2. The New Engagement screen will appear. Add the Contact and Engagement Type but leave all the other fields blank.



3. Click 'Save' and note that your newly-created Sub-Engagement now appears on the list of Sub-Engagements.



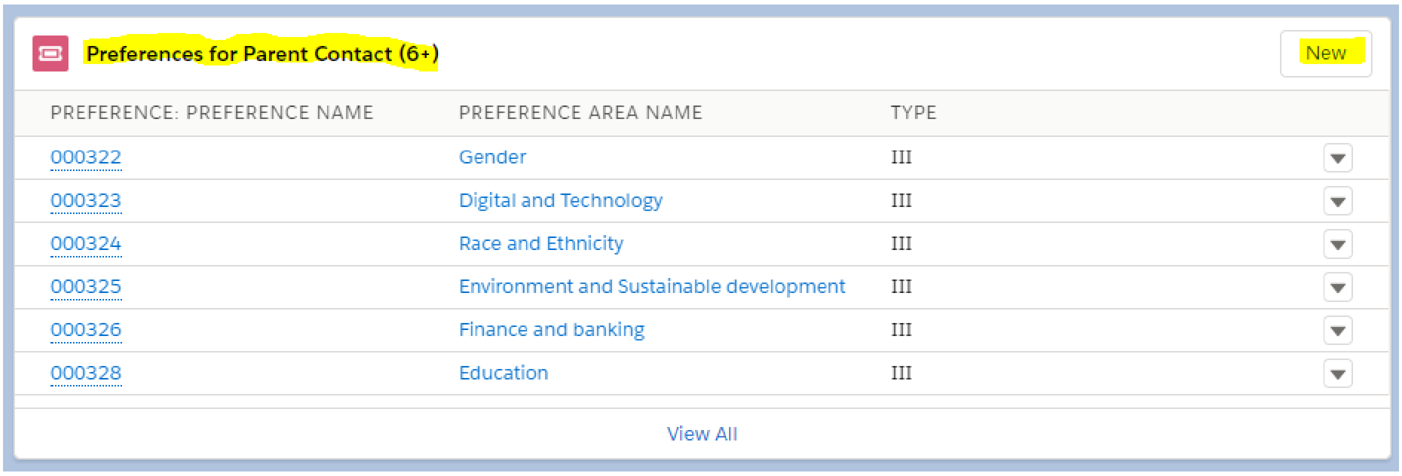
Associate keywords with a contact

In LSE's Salesforce environment keywords are stored as 'Preference Areas' which you can use to separate your contacts into groups. You could use this function, for example, to send contacts targeted information based on their keyword interests.

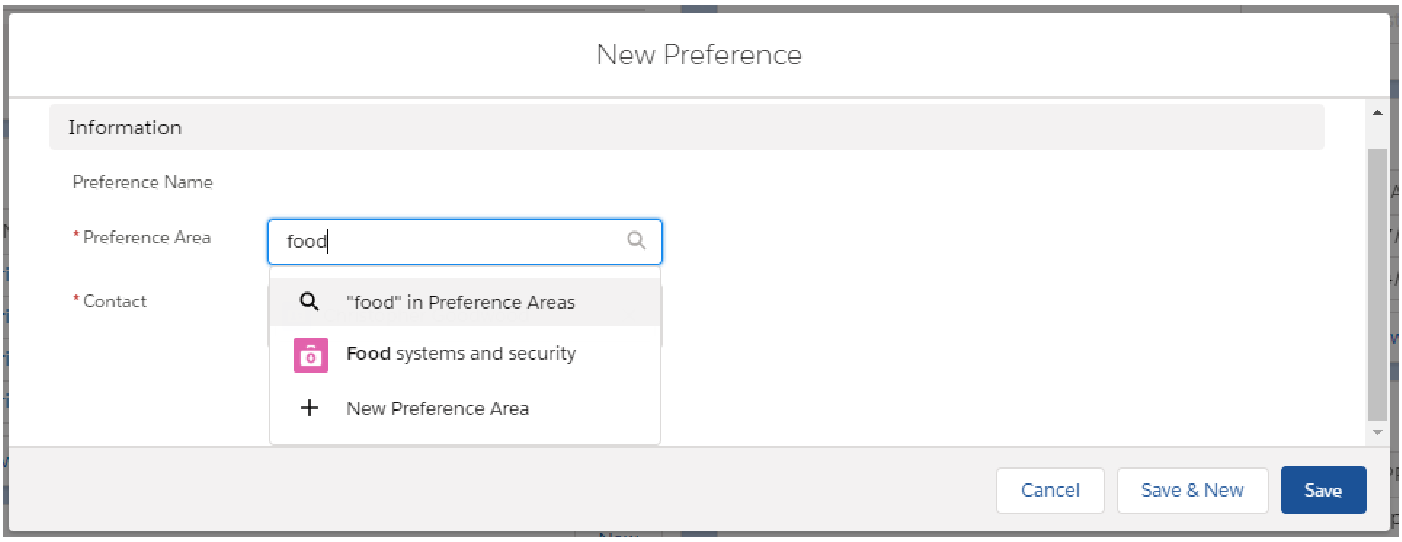
If you want to associate a contact with a keyword you need to create a 'Preference' record that links the individual's Contact record to the relevant Preference Area record. There are two ways to do this – one is quicker if you want to link multiple keywords to one contact, and the other is quicker if you want to link multiple contacts to a single keyword.

Option 1 – Associate multiple keywords to a single contact

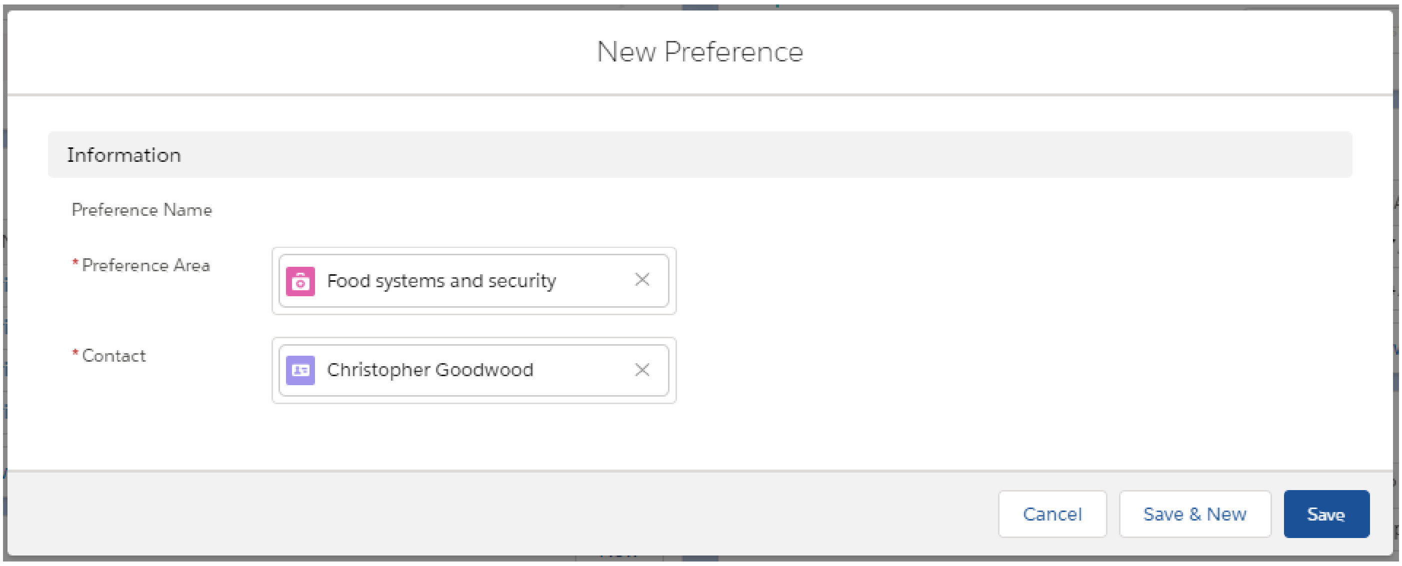
1. Follow the instructions above to open the primary Engagement record for a Contact, then scroll down to 'Preferences for Parent Contact' and click 'New'.



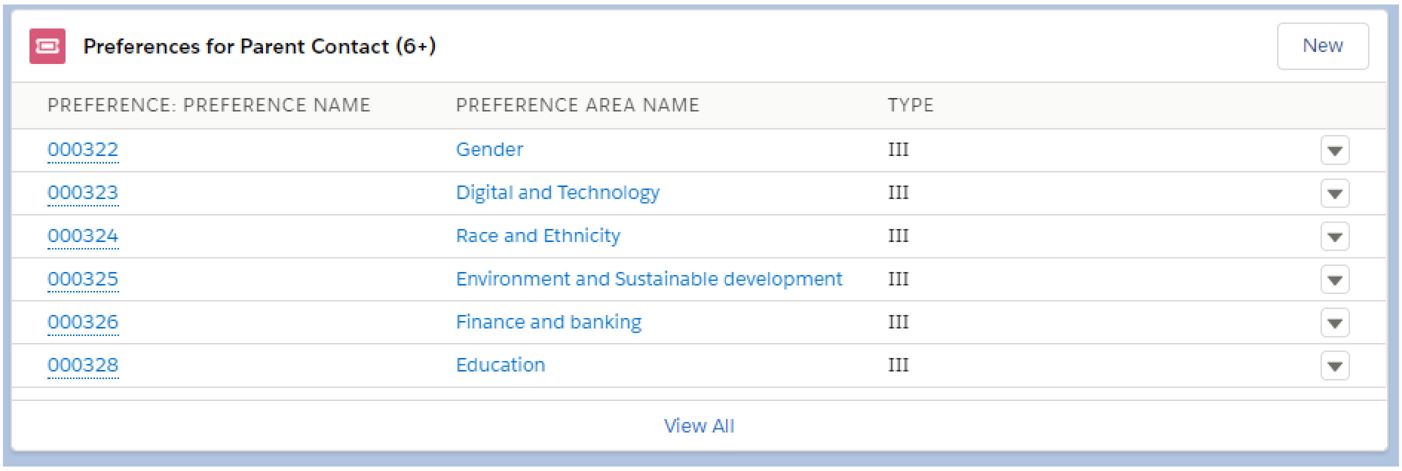
2. When the 'New Preference' screen appears, start typing the name of the keyword you want to associate to the contact in the 'Preference Area' field. When the keyword appears, click on it.



3. Note that the 'Contact' field will already be populated with the name of the contact you are associating with the keyword. Click 'Save' to return to the Engagement record page, or 'Save and New' to add another keyword.

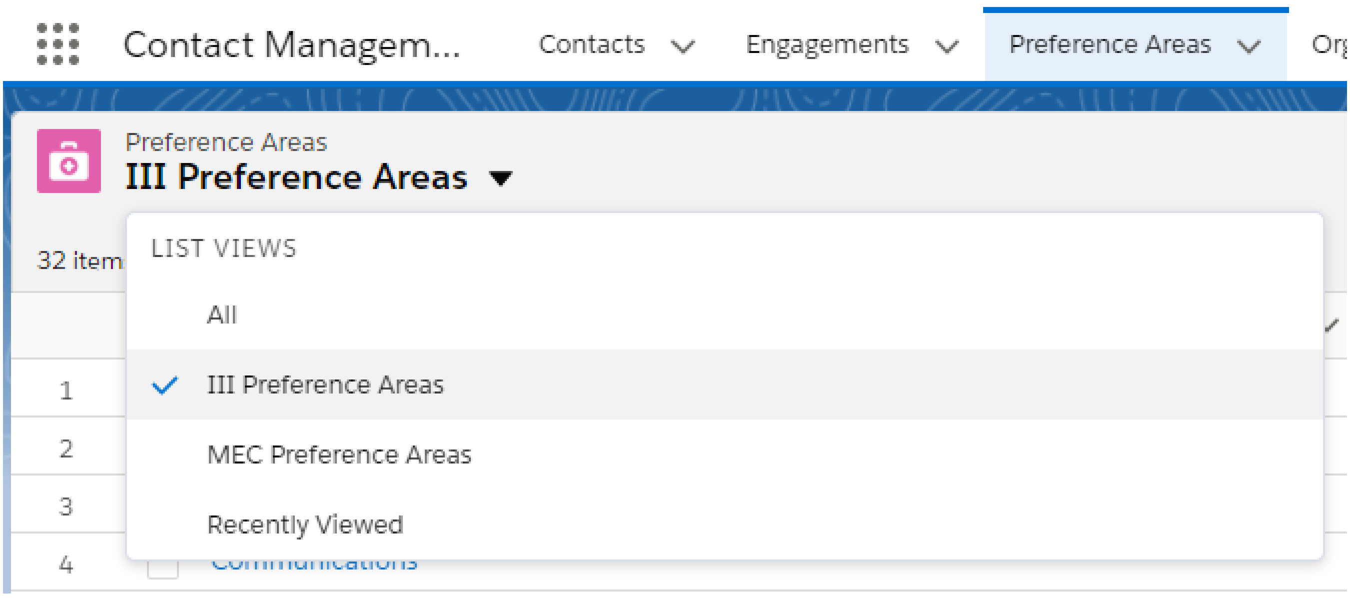


4. Once you have finished you will be returned to the Engagement record page. Keywords you have added will now be listed under ‘Preferences for Parent Contact’. If there are more than 6 then you will need to click on ‘View All’ to see them all.

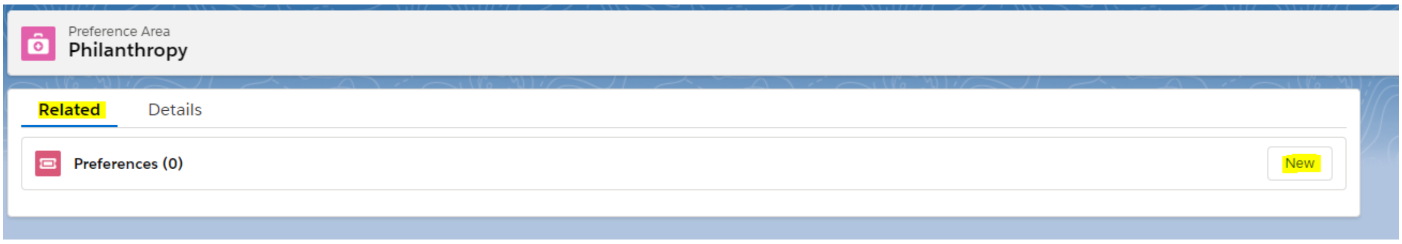


Option 2 – Associate multiple contacts to a single keyword

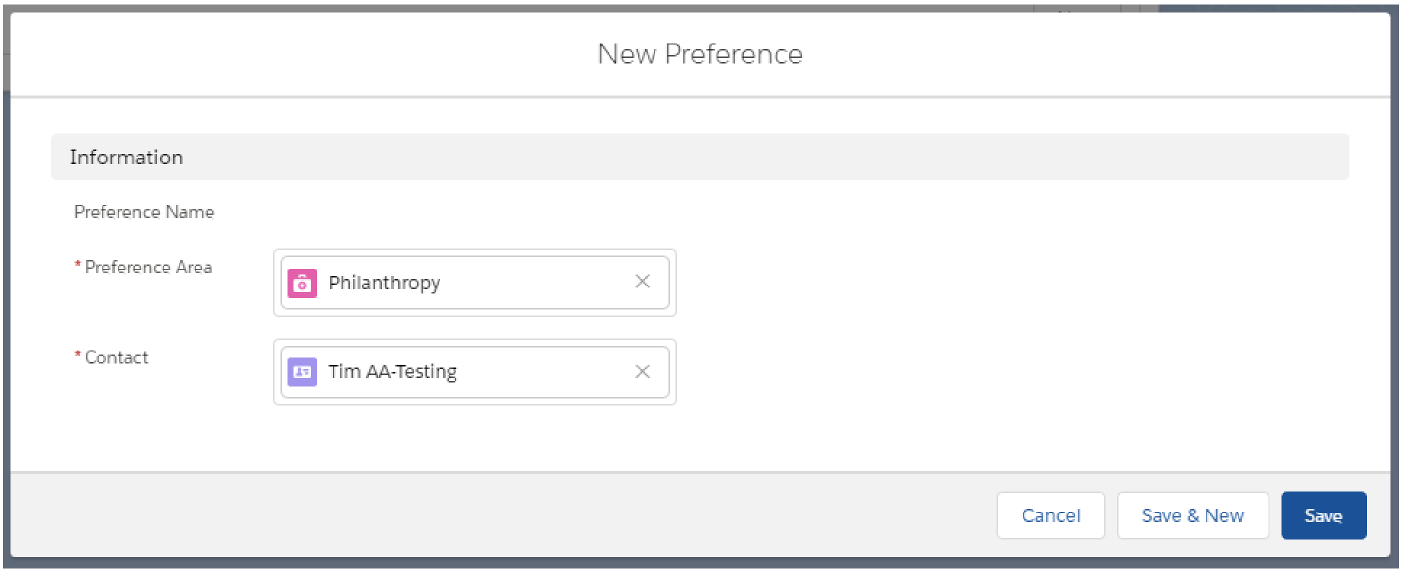
1. Click on the ‘Preference Areas’ tab and then change the list view from ‘Recently Viewed’ to ‘All’ or another relevant list view.



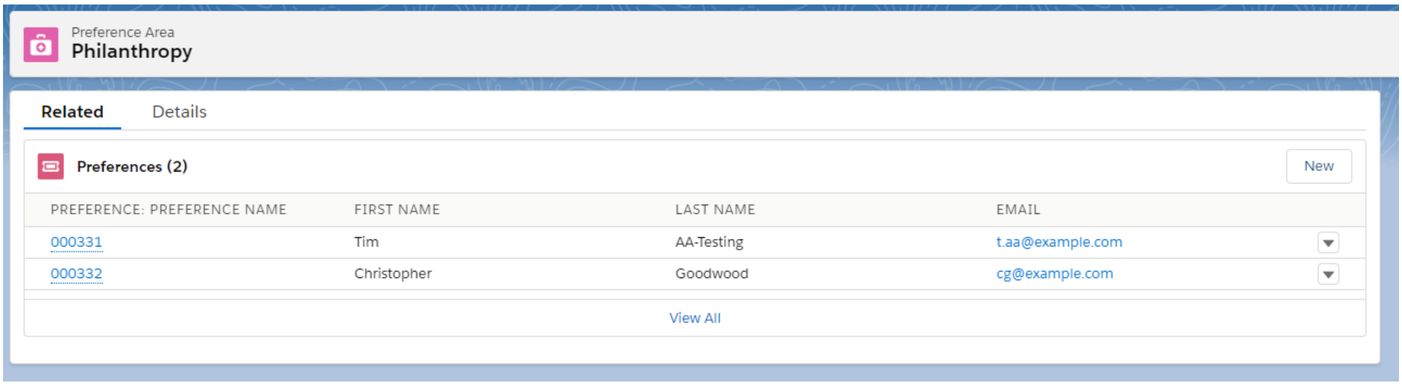
2. Scroll down the list of Preference Area keywords to find the one you want and click on it, or use the 'Search this list' box towards the top right of the screen.
3. Once you have opened your Preference Area, click on the 'Related' tab and then click 'New' next to 'Preferences'.



4. When the 'New Preference' screen opens, note that the 'Preference Area' field is already populated. In the 'Search Contacts' field start typing the name of the contact you wish to add. When their name appears, click on it to select, then click 'Save & New' to add another contact, or 'Save' to finish.



5. When you have finished you'll return to the Preference Area 'Related' list, which now show all the Preferences you have added.



Tip!

If you have a mailing list sign-up form you can ask contacts what keywords they are interested in when they sign up. These keywords can then automatically be associated with the Contact so that you don't have to add them manually.

Understand Event History and Applications

If your team manages events or programme applications with Salesforce then you may see data in the 'Event History for Parent Contact' and/or 'Applications for Parent Contact' boxes on the Engagement record page. This data is created automatically when contacts sign up to attend an event or start an application. You should not update this data yourself unless you are involved in managing events or processing applications and know what you're doing.

View a report or dashboard

To view a report or dashboard:

1. Click on the 'Reports' or 'Dashboards' tab as appropriate.
2. If the report or dashboard you want is on your 'Recent' list, click on it to view it.
3. If the report or dashboard you want is *not* on your 'recently viewed' list, click 'All Folders', select the folder that contains the dashboard you want and then click on it to open.