

Sections of the Contact Record

IMPORTANT: If a student has STARTED an application, the most up to date information may not be displayed on the student's Contact record. Once the application is SUBMITTED, the information will feed onto the Contact record, overwriting the information that was there from being manually entered in from an information or visit card, import, previous application etc. The Primary Application's information (once submitted) will always take precedence on the Contact record, that is why information MUST be edited on the application.

-This blue information box will tell you the core information about the student.

The screenshot shows a contact record for Jordan Smith. The interface includes a top header with the contact name, email address, and recruiter. Below this is a blue information box containing personal and academic details. Red arrows point from text labels to specific fields in the interface.

Origin Source (How we originally got their information (if any thing besides "Web-Create Account" or "Online Application", the record was created via internal data entry or imported.)

Email address

Anticipated entry term

Academic level

Major

Birth date

Address

Campus

The information on this side of the box does not always tell the whole picture, please make sure you DO NOT go by the information in this box for application information

Field	Value
Name	Jordan Smith
DOB	02/13/1996
Email Address	bama_jordan@yahoo.com
Address	126 Blackberry Ln Apt 801 Alexandria, Alabama 36250 United States
Origin Source	Hobson's Import
Anticipated entry term	Fall 2014
Academic level	Undergraduate
Major	Undeclared-degree seeking
Recruiter	Ashley Perry
Campus	Murray State - Main Campus
Application Status	Application Started

Basics and Background Info

This section will include basic demographic information about the student. If a student has an application that has not been submitted yet, this information might not be the most up-to-date address information we have on the student, check their application.

Intentions and Experience

This section will include the information the student provided when they originally created their account, or what was provided to us from an information card or import file.

IMPORTANT: If you see by looking at this section that a student has selected incorrect information (i.e. They've selected the wrong admit type or a location they cannot attend, etc.) and the student has an application, this information **MUST** be edited on the application after it has been submitted. These changes **MUST** be made while the Contact record is shut, and before it is sent to ERP.

If (and only if) the student does **NOT** have an application at all, the information can be edited directly on the Contact record.

Application Information

The "Application Processing" section has fields that will be entered by an admissions processor before the student's application is sent to Banner.

The "Application Status" will show you the current application-related dates for the student's "Primary Application". If the student has multiple applications, and the reference number you see in the "Primary Application" field does NOT match the application that should be primary (i.e. the student has started multiple applications for the same term), the student's admissions processor will need to edit this field to ensure the correct application is listed.

Primary Application	<input type="text" value="f7045206fa8a6a1b"/>	
Application Started Date	<input type="text" value="5/7/2015"/>	
Application Submitted Date	<input type="text" value="9/8/2015"/>	

Codes & Ratings

This section will show you the “Origin Source” (how we originally got a student’s information) and their “Inquiry Source” (the latest interaction we’ve had with this student).

If the student has attended any events tracked by Undergraduate or Transfer Recruitment, they will be listed in the “Event Information” Section.

Event Information							
Event Type	Racer Round-Up Campus Visit	Event Name	Central Hardin HS	Event Host	Mallory LaPlant	Event Date	11/1/2015
Event Type 2	School Visit	Event Name 2	Hopkinsville HS	Event Host 2	Matt Jones	Event Date 2	10/22/2015
Event Type 3	Murray State Visit	Event Name 3		Event Host 3	Ashley Perry	Event Date 3	9/1/2015
Event Type 4		Event Name 4		Event Host 4		Event Date 4	
Summer O Session Attended		Summer O Session Date		Registered for Summer O	<input checked="" type="checkbox"/>	Attended Racer Academy?	<input type="radio"/> No <input type="radio"/> Yes
Summer Program Attended	GSP						

If you scroll down to the “External Account” section, you can see if the student has connected to their account (if the student was imported or entered by data entry, they may never have connected to their account via the email instructions they were sent after their Contact record was created). If you do not see an email listed here, the student has not finished the process, and you can re-send a “Connect to Account” email to the student that will send them the link to do so.

External Account	
External User Authentication ID	 cjack@fake.com

If they do have an email address in this field, you can click on it to go directly to their External User ID (you normally go into Settings > External Users and search for the student, this will take you directly there). From here, you can see the username for the student (the email address EXACTLY how it is listed in the name field) unlock a student’s account, reset their password, and see account log in information.

If a student is wanting to change their email address they sign into their account with, you will need to change the email address in both the “Name” and the “Email” fields.

The screenshot shows a user profile page with the following details:

General	
Name *	cjack@fake.com
Full Name	Colby Jack
Email	cjack@fake.com
Reset Password Flag	<input type="radio"/> Yes <input checked="" type="radio"/> No
Is Approved	<input checked="" type="radio"/> Yes <input type="radio"/> No
Is Locked	<input type="radio"/> Yes <input checked="" type="radio"/> No
Owner *	Murray State University
Created On	8/14/2014 3:12 PM
Last Login or Reset Date	3/17/2016 11:05 AM
Password Change Date	8/17/2015 3:50 PM
Last Lockout Date	1/1/1900 12:00 AM

IMPORTANT: Editing the email address in the External User ID will only change the address the student will use to log in to their account. If you are needing to update an email address, you will also need to change it on the application. If the student **does not** have an application, you can edit it directly on their Contact record, or ask them to edit it on their “Profile Information” in their account.

Notes

This section can be used by anyone with a Recruiter license to make a note about the student—the student **CANNOT** see this information within their account. Attachments may also be uploaded here.



Closed Activities

By clicking on this link on the left-hand sidebar of the Contact record, you can see various activities and communications that have occurred through the student’s account (note: if a student has previously been merged with a duplicate record, you may see two of the same email, letter, etc. for the student). If a student has been sent any email via an automatic workflow or manual push through the system, you will be able to see them listed here. Also, you will be able to see when items were received and other account activities.

Contact
Colby Jack

Email Address
lredd1@murraystate.edu

Filter on: All

<input type="checkbox"/>	Subject	Activity Type	Activity Status	Regarding	Priority
<input type="checkbox"/>	Official ACT Score Received	Item Received	Completed	Colby Jack	Normal
<input type="checkbox"/>	MSU International Application	E-mail	Completed	Colby Jack	Normal
<input type="checkbox"/>	Official SAT Reasoning Score Received	Item Received	Completed	Colby Jack	Normal
<input type="checkbox"/>	Department of Music Audition Application	E-mail	Completed	Colby Jack	Normal
<input type="checkbox"/>	MSU Graduate Application	E-mail	Completed	Colby Jack	Normal

NOTE: This will NOT always include ExactTarget emails. To see if a student has received ExactTarget emails, you will need to click on the “Subscriber View” icon at the top of the Contact record. This will take a few minutes to load and can only be accessed using Internet Explorer because of Silverlight restrictions.

imize Help

Add to Marketing List
 Connect
 Assign
 Sharing
 Copy a Link
 E-mail a Link
 Run Workflow
 Start Dialog
 Run Report
 Send to ERP
 Send ExactTarget Email
 Subscriber View

Collaborate Process Data ExactTarget

Contact
Colby Jack

Once the box loads, you will need to change the dates at the top to reflect the time span you're wanting to look at (it automatically sent to one month, but you will want a large window of time). Click on the calendars or manually type in dates, then hit "Enter" on your keyboard.

Colby Jack (Active)

2/28/2016 To 3/29/2016

Emails Sent

Events

By clicking on the individual email tabs, you can see the analytics of that particular email.

Colby Jack (Active)

Emails Sent

5

Open Rate

80%

Click Rate

40%

Bounces

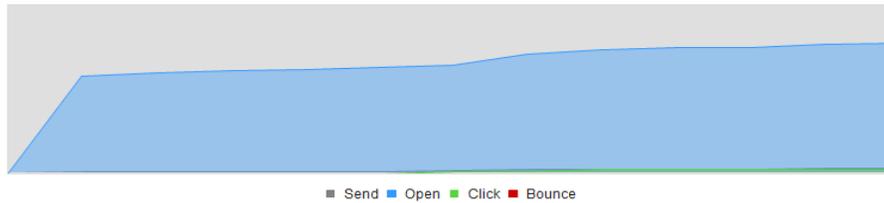
1

First Sent To
4/20/2015

Last Sent To
2/11/2016

1/1/2015 To 3/29/2016

Events



Sends

Academic Achievement Email | 2/11/2016



Opens 4
Clicks 0

Account Creation-Information Request | 1/14/2016

Deanne - MSU 2 You | 12/1/2015

Parent - Scholarship Email | 11/13/2015

Crime Log Notice for Applicants | 4/20/2015 | Bounce

High School Info

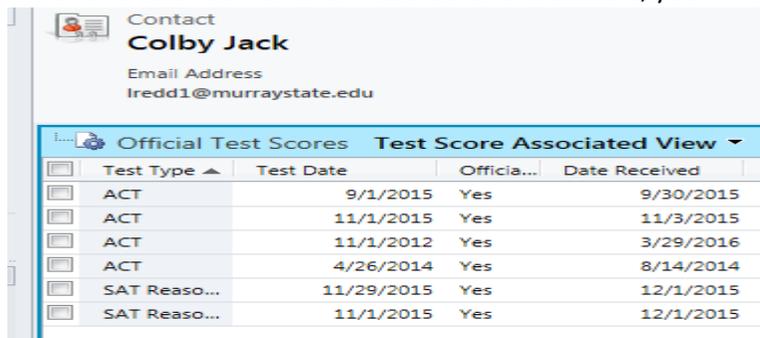
This section will show you the high school information we have for this student. If transcript information has been received, you will see the information here.

College Info

This section will show you the college information we have for this student. If transcript information has been received, you will see the information here.

Official Test Scores

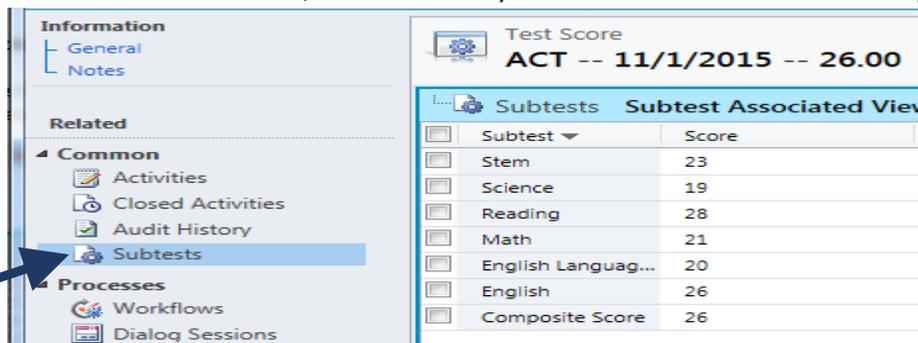
If we have received ACT or SAT scores for the student, you will be able to see them here.



Contact
Colby Jack
Email Address
lredd1@murraystate.edu

Test Type	Test Date	Officia...	Date Received
ACT	9/1/2015	Yes	9/30/2015
ACT	11/1/2015	Yes	11/3/2015
ACT	11/1/2012	Yes	3/29/2016
ACT	4/26/2014	Yes	8/14/2014
SAT Reaso...	11/29/2015	Yes	12/1/2015
SAT Reaso...	11/1/2015	Yes	12/1/2015

To look at the sub-scores, double-click anywhere on the line of the test date you are wanting to look at, then click on "Subtests".



Information
General
Notes

Related
Common
Activities
Closed Activities
Audit History
Subtests
Processes
Workflows
Dialog Sessions

Test Score
ACT -- 11/1/2015 -- 26.00

Subtest	Score
Stem	23
Science	19
Reading	28
Math	21
English Languag...	20
English	26
Composite Score	26