

Get Started with Admissions Connect

This webinar will begin shortly





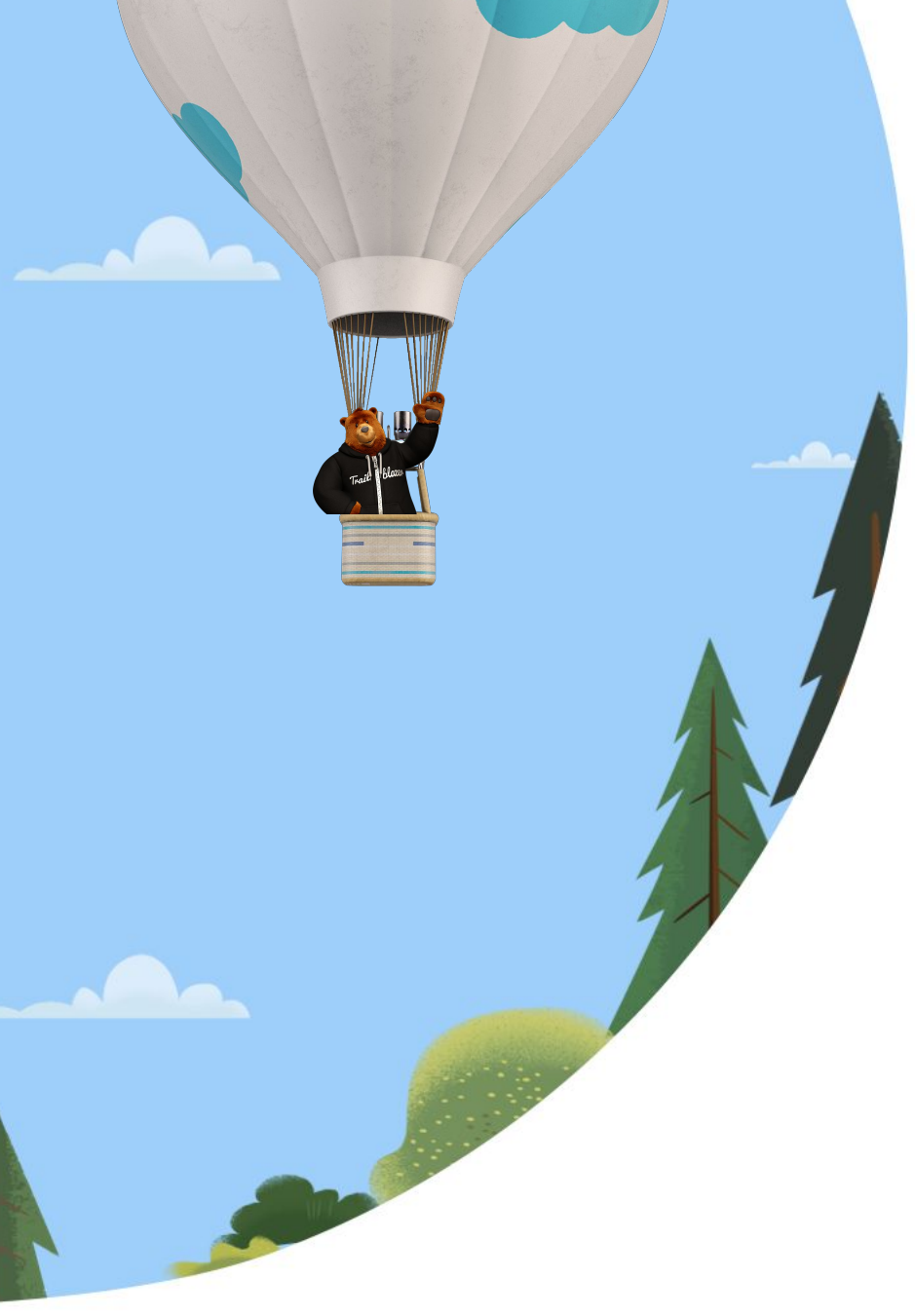
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This presentation contains forward-looking statements about the Company's financial and operating results, which may include expected GAAP and non-GAAP financial and other operating and non-operating results, including revenue, net income, earnings per share, operating cash flow growth, operating margin improvement, expected revenue growth, expected current remaining performance obligation growth, expected tax rates, stock-based compensation expenses, amortization of purchased intangibles, shares outstanding, market growth, environmental, social and governance goals, expected capital allocation, including mergers and acquisitions, capital expenditures and other investments, expectations regarding closing contemplated acquisitions and contributions from acquired companies. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, the Company's results could differ materially from the results expressed or implied by the forward-looking statements it makes. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: risks associated with our ability to successfully integrate Slack Technologies, Inc.'s operations; our ability to realize the anticipated benefits of the Slack Technologies, Inc. transaction; the impact of Slack Technologies, Inc.'s business model on our ability to forecast revenue results; disruption from the transaction making it more difficult to maintain business and operational relationships; the impact of, and actions we may take in response to, the COVID-19 pandemic, related public health measures and resulting economic downturn and market volatility; our ability to maintain service performance and security levels meeting the expectations of our customers, and the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate performance degradation and security breaches; our ability to secure and costs related to data center capacity and other infrastructure provided by third parties; our reliance on third-party hardware, software and platform providers; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy; current and potential litigation involving us or our industry, including litigation involving acquired entities such as Tableau; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services beyond the CRM market; the success of our strategy of acquiring or making investments in complementary businesses and strategic partnerships; our ability to compete in the market in which we participate; the success of our business strategy and our plan to build our business; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to develop our brands; the valuation of our deferred tax assets and the release of related valuation allowances; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property; uncertainties regarding the effect of general economic conditions; and risks related to our debt and lease obligations.

Agenda

What we'll cover in this session

- 1 Meet Admission Connect
- 2 Unify Data from Prospect to Applicant
- 3 Organize Application Requirements
- 4 Application Review Made Easy
- 5 Q&A and Resources



Meet Admissions Connect



Towards a Unified Approach

Connecting real-time data to teams

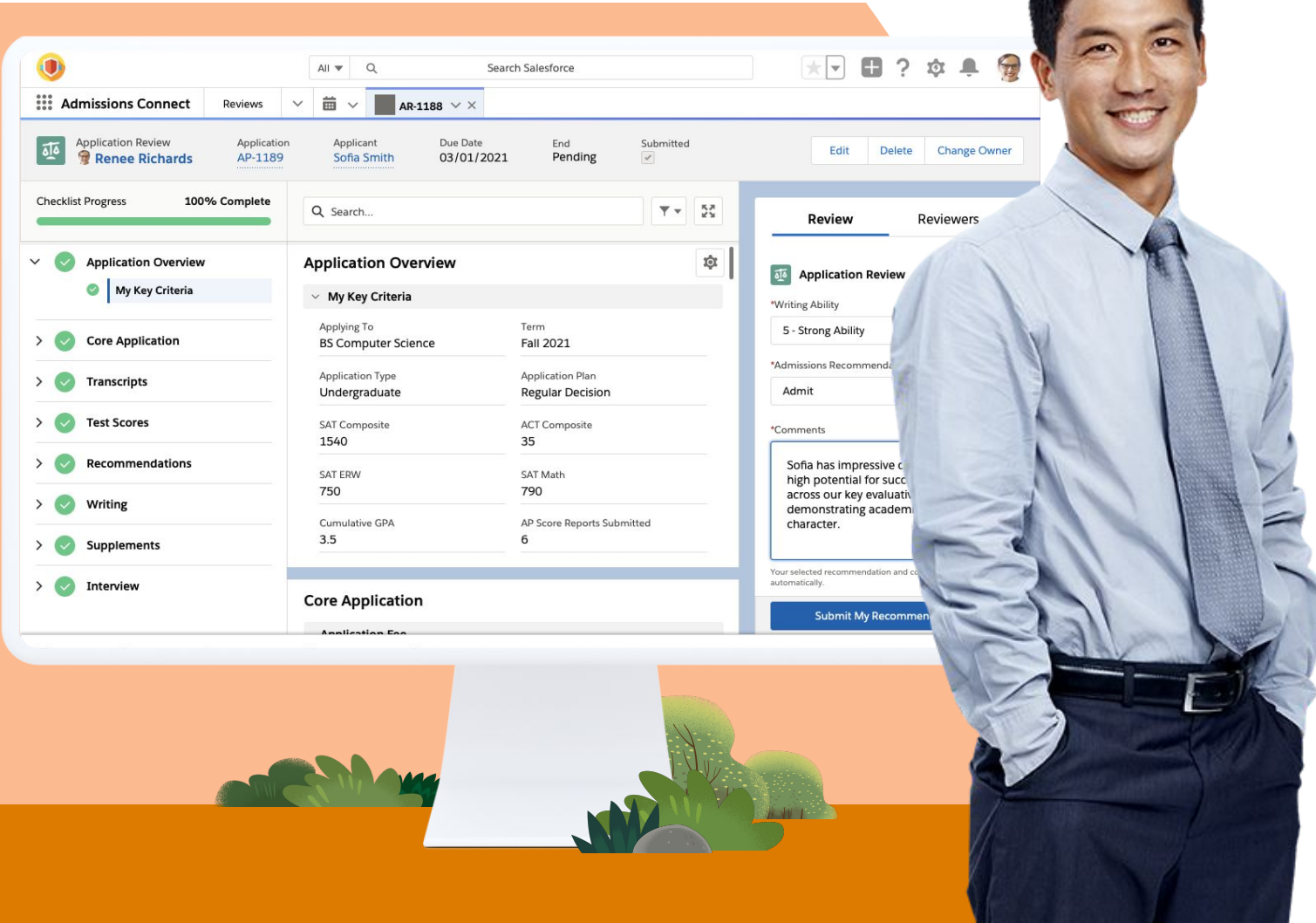
Connection to each other and information is **key** for Recruitment and Admissions teams -- from **recruiters to admissions counsellors to leadership.**



Education Cloud champions a **connected, personalized and collaborative experience** for students and staff through **one connected platform.**

Admissions Connect

Provide a unified experience for applicants and admissions professionals



- Drive applicant engagement
- Streamline application review
- Work Smarter with full visibility



Meet the Applicant Experience Portal

Keep applicants on track with personalized support on any device

Personalize Every Applicant's View

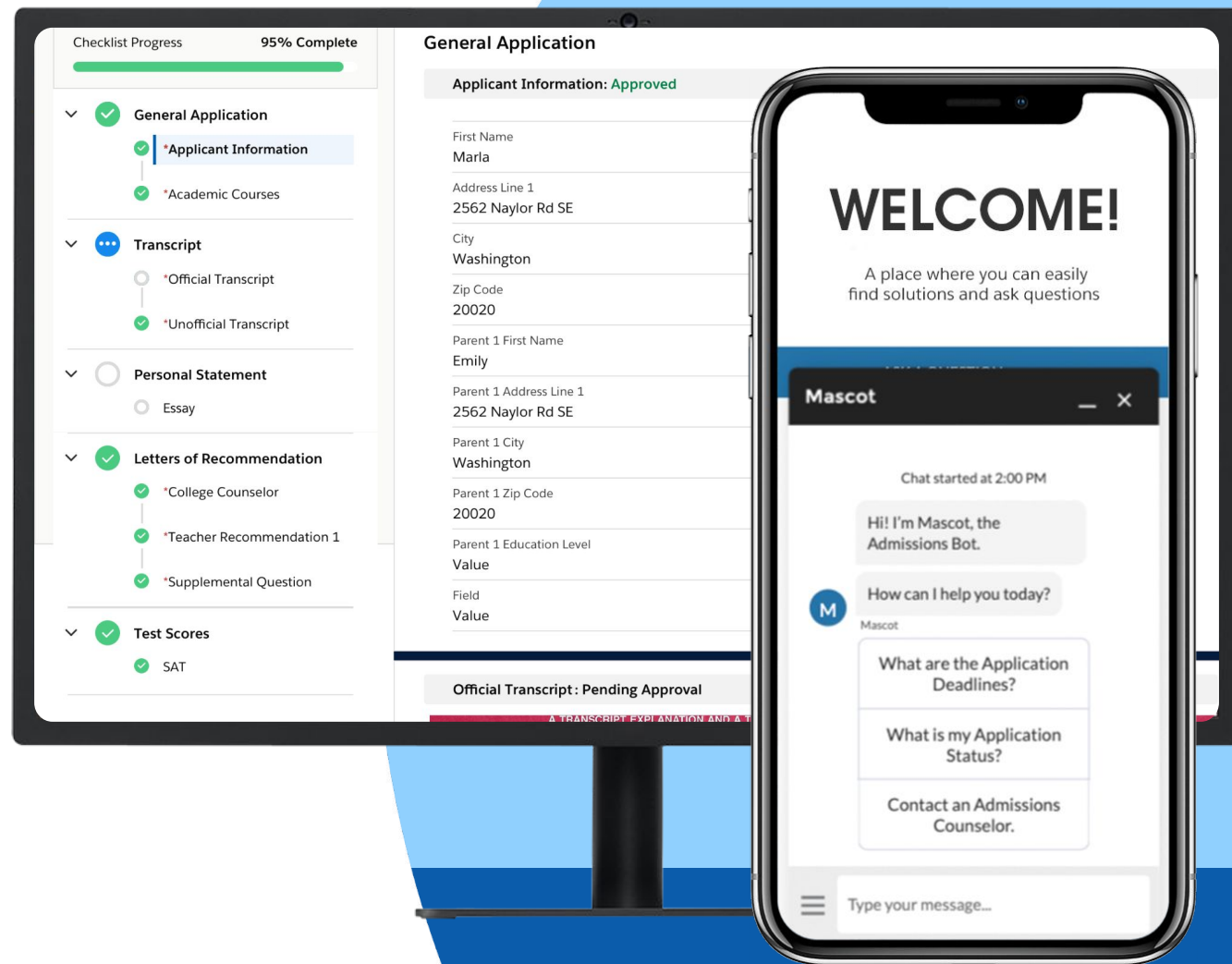
Strengthen applicant engagement by providing their unique application information in a simple, mobile-friendly view

Empower Real-time Status Tracking

Increase application completion with a dynamic, chatbot-supported checklist of complete and incomplete tasks

Simplify Document Uploads

Give applicants easy access to upload, view, and track receipt of their required documents



Education Cloud for K-12

Purpose-built education products built on the #1 CRM platform

 salesforce.org



Education Cloud *Purpose-Built Products*

Admissions
Connect



Student
Success Hub

Accounting
Subledger

EDA

Foundation of Education Cloud

Constituent 360
Salesforce Platform

Sales



Service



Marketing



Analytics



Integration



Faculty/Staff
Experience



Upskilling
& Reskilling



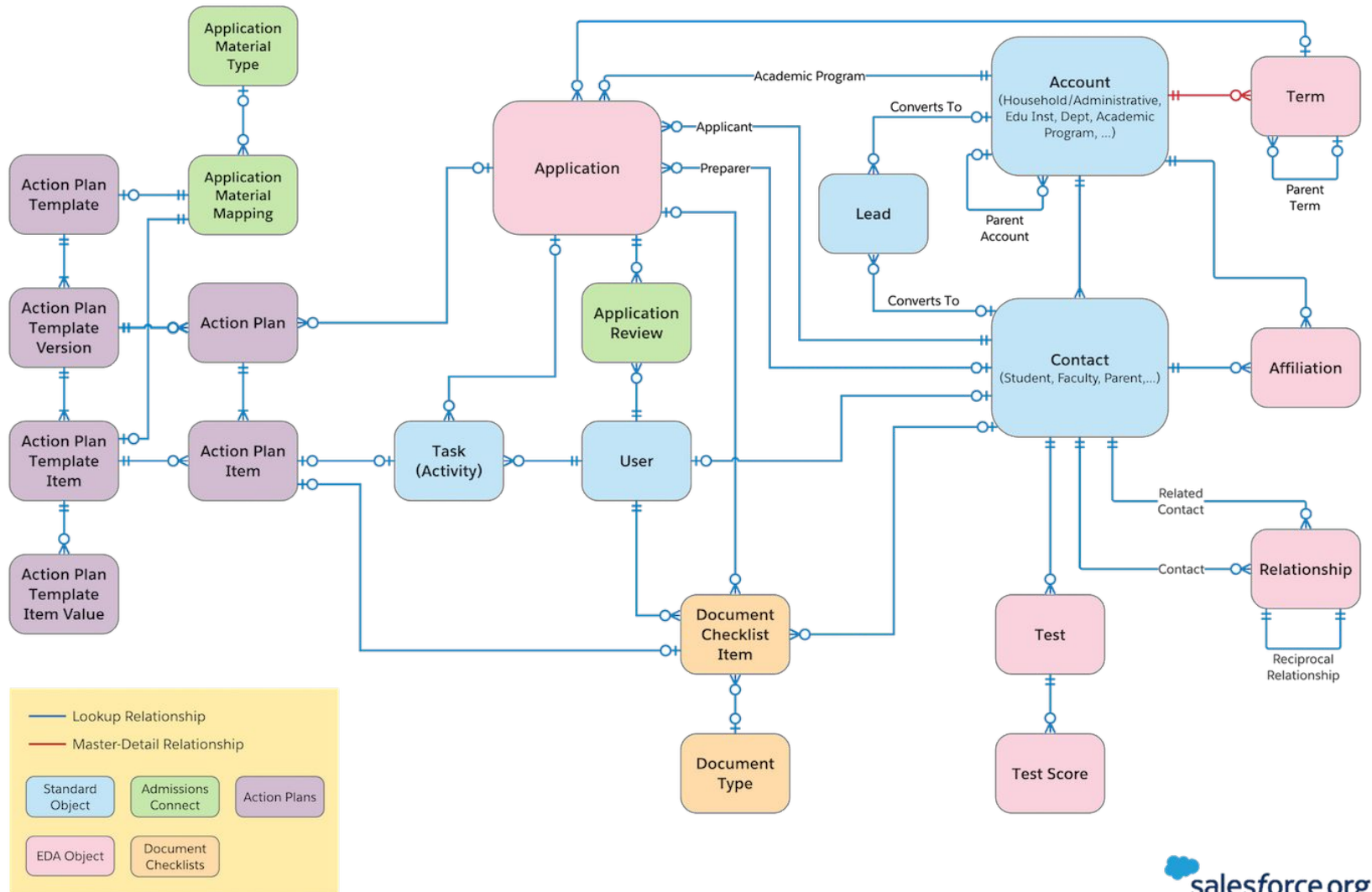
Partner
Ecosystem



Unify Data from Prospect to Applicant



Admissions Connect Entity Relationship Diagram (ERD)



Model Admissions Applications

Manage an applicant's information, education history and qualifications

Prospective Student



Affiliations

Account: Volunteering
Habitat for Humanity

Account: Sports Organization
Intramural Basketball Team

Account: Extracurricular Activity
Chess Club

Application: Language Minor
French

Application: Essay
500 Word Short Story

Application: Honors
Community College Honors Program

Application: Academic Program
BA Science, Biology

Application

Education History: Educational Institution
Connected Community College

Education History: Degree Earned
Associate in Science (AS)

Education History: GPA
3.89

Test Score: ACT
27

Test Score: SAT
900

Test Score: AP Calculus
4

Test Score: AP English
3

Education History

Test Scores

Alex Garcia

Education Data Architecture

Map Your Application Data

Customize for what's most important to your school



Plan

Map existing data
to EDA and Admissions
Connect Objects



Identify Gaps

Ask: do the EDA and
Admissions Connect
objects capture the
data we need to make
admissions decisions?

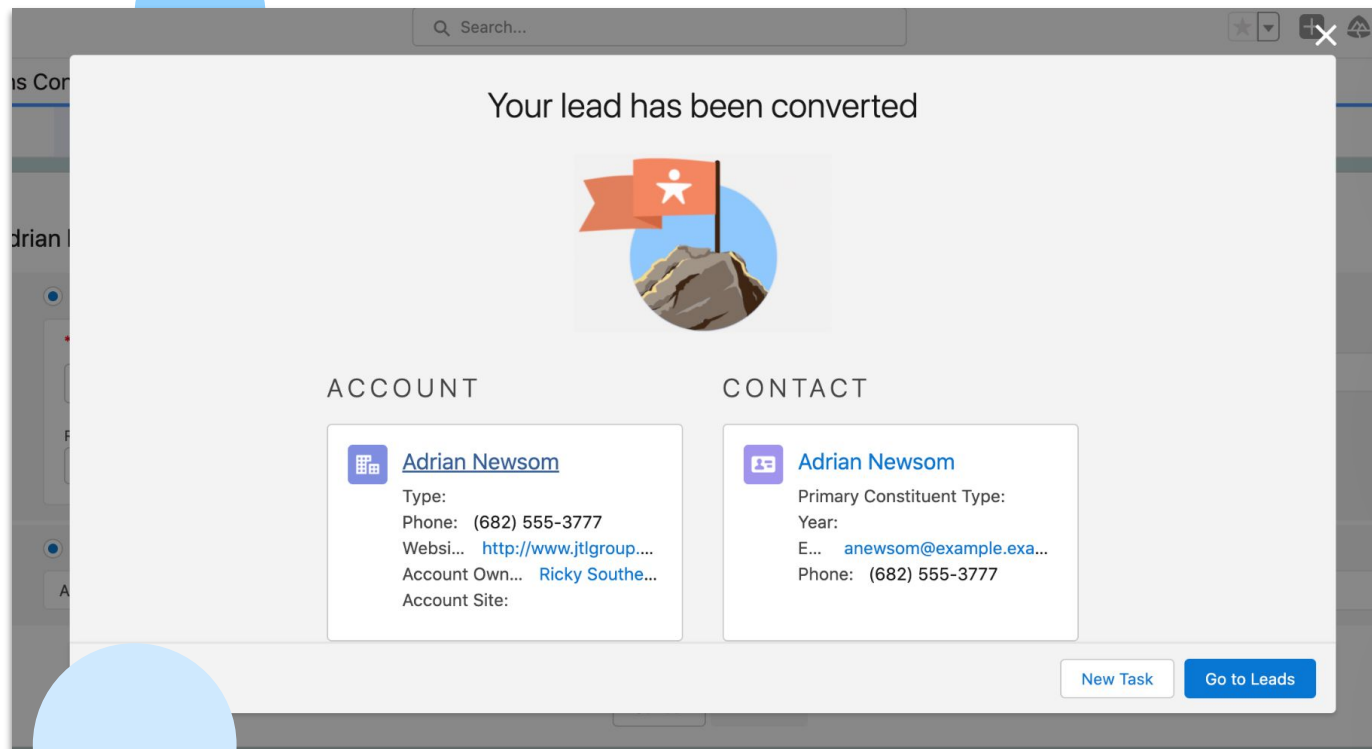


Take Action

Tailor objects to your
University's needs using
record types, custom
fields, picklist values
and more

Capture Prospects with Lead Conversion

Tips on managing suspects, prospects and leads



1

Collect Suspect Data

Upload manually or set up [a web to lead form](#)

2

Configure Leads

Including [leads settings](#) and [conversion field mappings](#) in EDA

3

Maintain Lead Data

[Merge duplicate leads](#) and Create a cycle for regular maintenance

Organize Application Requirements



Application Record at a Glance

1 Application Header

Application: **Moustafa Transfer**

Applying To: [BS Economics](#) | Application Type: [Transfer](#) | Application Status: [Incomplete](#) | Term: [Fall 2022](#) | Open Date: | Due Date: |

2 Checklist

Applicant Responses | Action Plans | Application Details

Application Checklist

Required Items Progress: 67% Complete

Completed Items (10)

Checklist Item	Required	Status	Last Modified
Applicant Details	Yes	Completed	3/15/2022
Family Details	Yes	Completed	3/15/2022
Core Application Details	Yes	Completed	3/15/2022
Education Details	Yes	Completed	3/15/2022
Official High School Transcript	Yes	Approved	3/15/2022
Unofficial Transcript	No	Approved	3/15/2022
Professional Reference	Yes	Approved	3/15/2022
Application Questions	No	Completed	3/15/2022
Applicant Questions	No	Completed	3/15/2022
Education History Questions	No	Completed	3/15/2022

3 Application Review

Reviewer Snapshot

0 of 3 Reviews Completed

My Review

Status: [Admit](#) | Due: [06/30/2021](#)

[Continue Review](#)

4 Feed

Reviewers | **Feed**

Post | Poll | Question

Share an update... [Share](#)

Search this feed...

Jenna Ross created this application.

Understanding Action Plans: Terms to Know

Term	How it works	Use Case
Action Plan Template	Allow admissions teams to reuse the same set of requirements for multiple applicants, and different application types.	Commonly used action plans, or application requirement category that generally require the same set of tasks (eg: Freshman Scholarship)
Action Plan Template Item	Allow admissions teams to create, reuse, and share action items (tasks or document checklist items) as part of an Action Plan Template.	Commonly used action items that need to be accomplished to satisfy the application requirement category. (Eg: Freshman Scholarship Essay - Document Checklist Item)
Action Plan	Can be created ad hoc or when an Action Plan Template is assigned to a contact. Represent an individual's application to-do list.	Contains an individual's application records that have been defined by an Action Plan template (eg: Lavanya Rao's Freshman Scholarship Action Plan)
Action Plan Item	Can be created ad hoc or when an Action Plan Template is assigned to a contact. Represent each action item (tasks or document checklist items) in an individual's application to-do list.	Contains an individual's application documents and tasks records that have been defined by an Action Plan Template items (eg: Lavanya Rao's Scholarship Essay)



Action Plan Template Examples

Organizing your Application Requirements



**Core
Application**



Recommendations



Transcripts

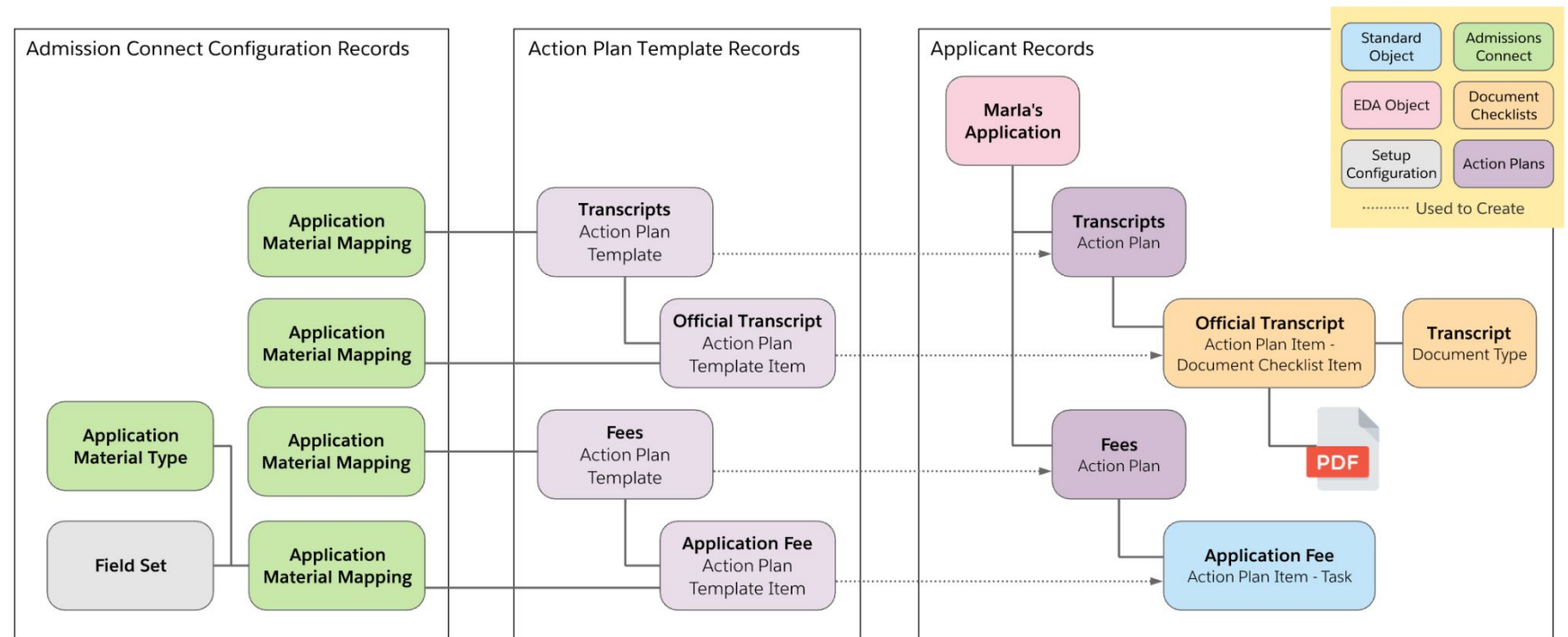
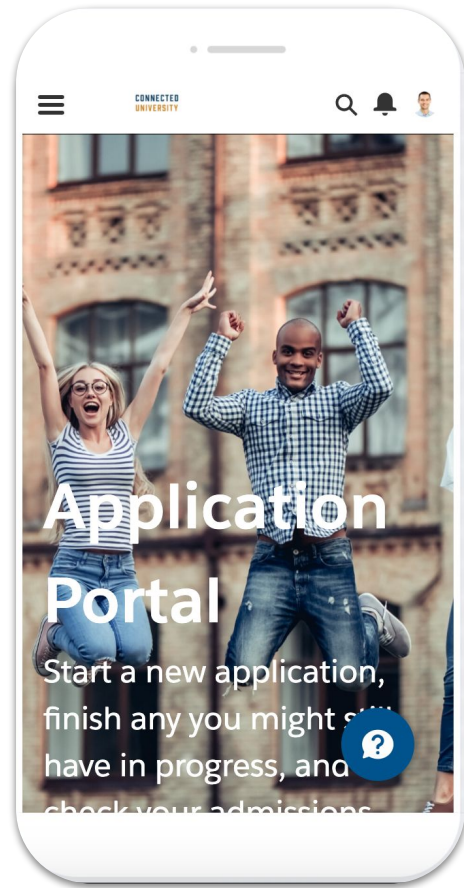


**Pre-Med
Requirements**



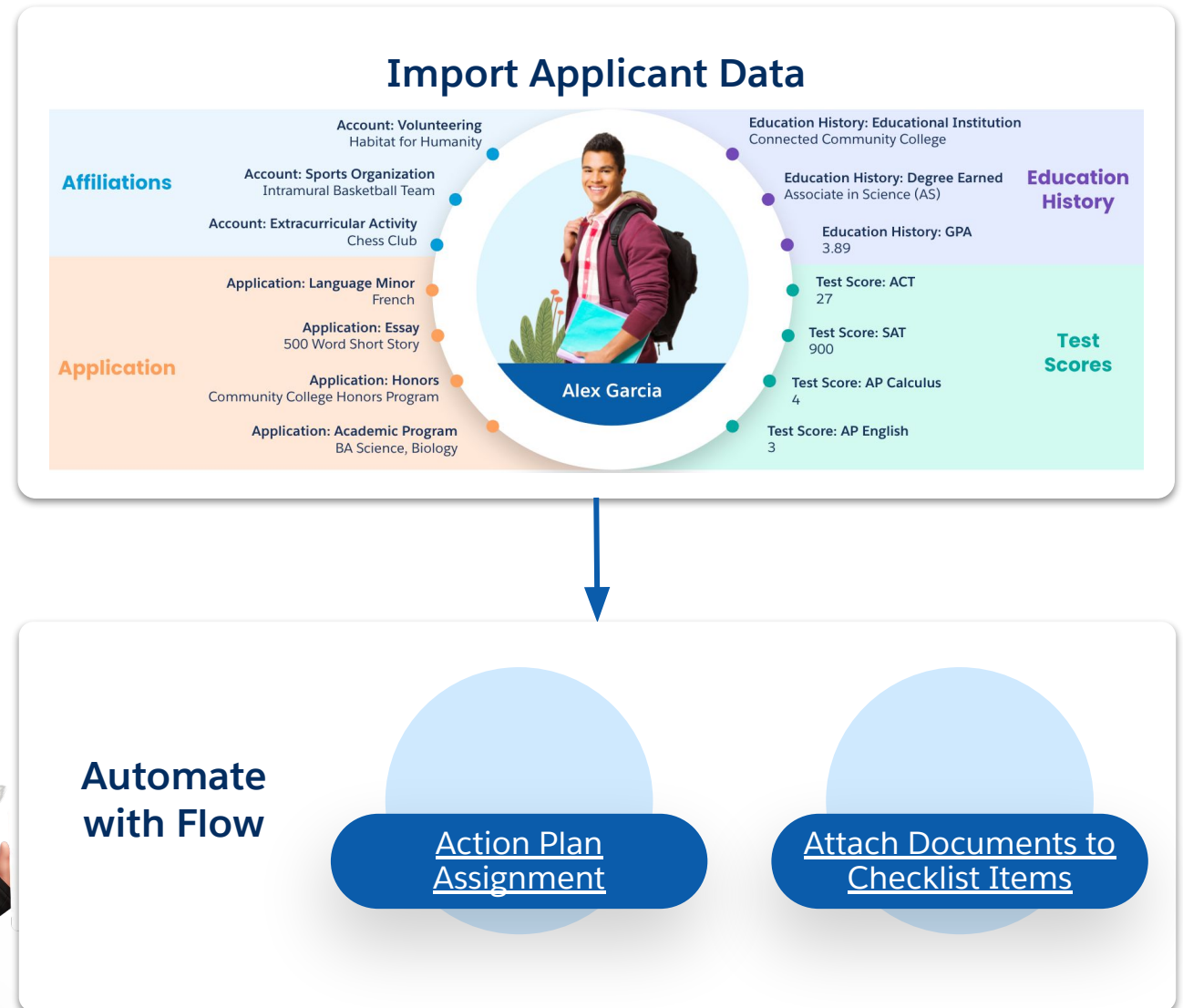
Configure Visibility in Admissions Connect

Understanding Application Material Mapping Objects



The Case for Automation

Accelerate admissions with automation at different touchpoints



Admin Checklist

- ☐ Review **Admissions Connect Documentation**
- ☐ [Plan Your Application Requirements](#) in detail
- ☐ Ensure proper **permissions are assigned** and **sharing settings are configured**
- ☐ Consider Automation
- ☐ Create a plan for **Action Plan maintenance**



Application Verification and Review Made Easy



To Verify or Review?

The backbone of Admissions Connect



Application Record

APP-0000

Ready for... In Review Reviewed [Mark Application Review Status as Complete](#)

Application APP-0000 [Follow](#) [New Note](#) [Edit](#)

Applicant	Applying To	Term	Application Type	Application Plan	Checklist Completion
Marla Gianni	B.S. in Computer Science	Fall 2022	Undergraduate	Standard	71%

Checklist Applicant Responses Related Application Details

Application Checklist

Required Items Progress 71% Complete

Completed Items (5)

Checklist Item	Required	Status	Last Modified
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Application Review

Reviewer Snapshot

0 of 2 Reviews Completed

Application Reviews More

Reviews (2) [Manage](#)



Application Review Record

Admissions Connect Application Reviews AR-000006

Application Review [Regina Visser](#)

Application	Applicant	Review End Date	Review Due Date	Admissions Recommendation	Submitted
APP-0000	Marla Gianni			Admit	☐

Checklist Progress 71% Complete

- Core Application
- Transcripts
 - Official Transcript
 - Unofficial Transcript
- Test Scores

Transcripts

Official Transcript: Pending Approval

Trailhead Academy
50 Fremont, San Francisco, CA, 94105

OFFICIAL HIGH SCHOOL TRANSCRIPT

Student Name: Marla Gianni		Date of Birth: 5/1/2002	
Address: 123 Circle Drive, San Francisco, CA 94105		Gender: Female	
Graduation Date: June 2020		Date of Enrollment: August 2016	

Year	Learning	Grade	Duration	Type	Academic Summary
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Review

Admission

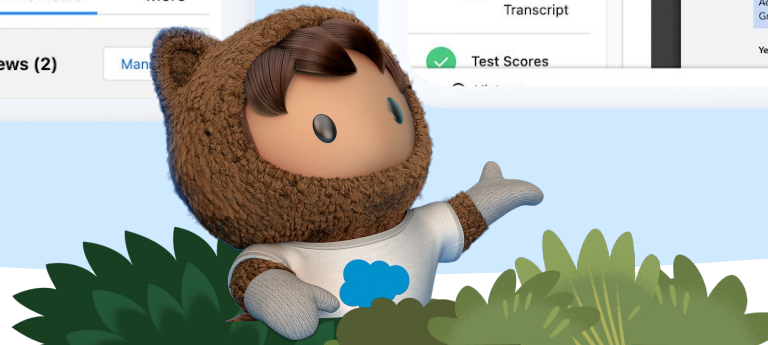
Admit

Review

Marla Gianni and s
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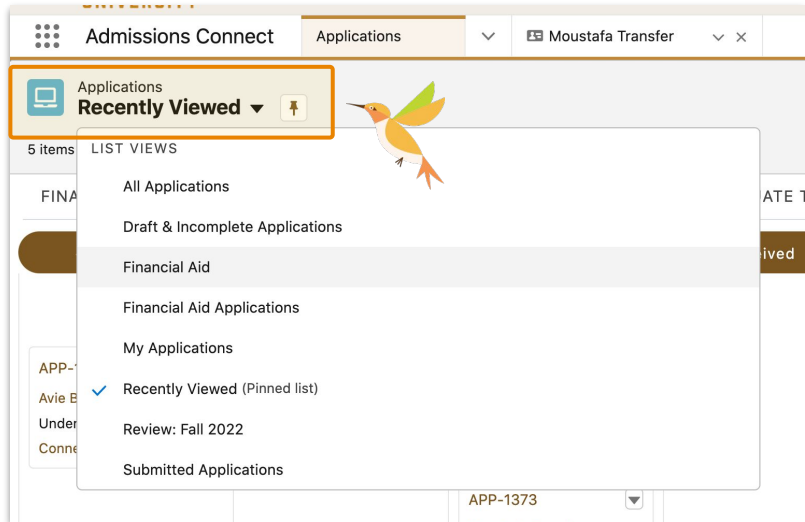


Verify Applications



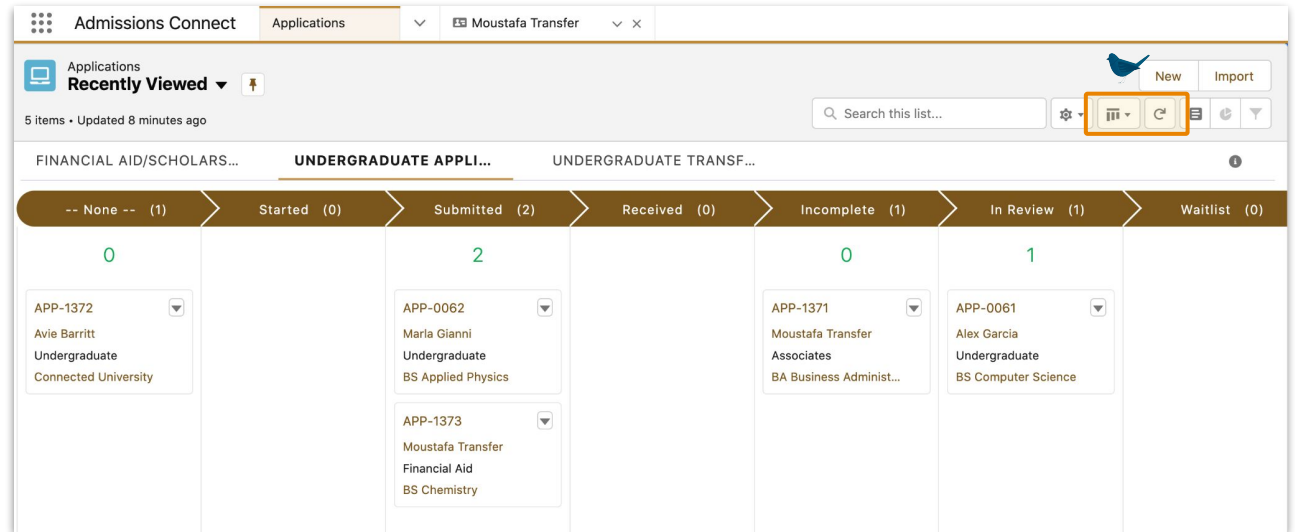
Streamline Verification with Listviews

Curate Specific List Views



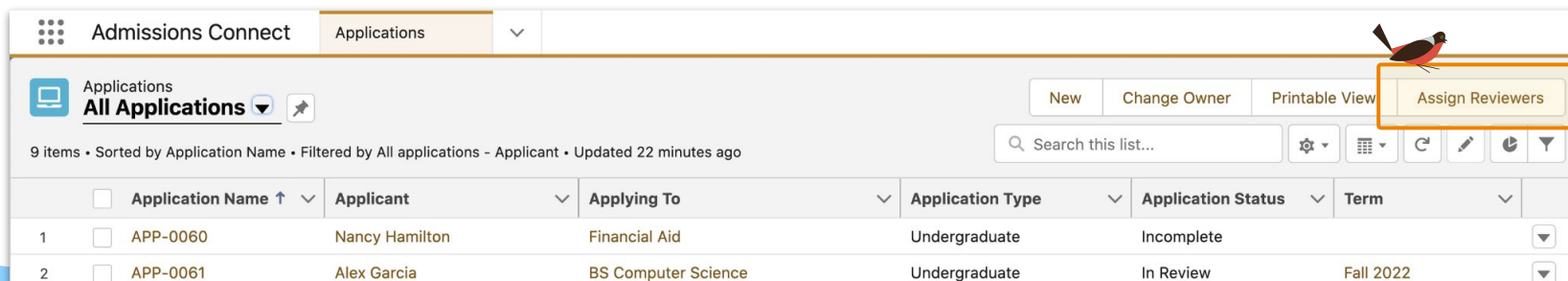
The screenshot shows the 'Admissions Connect' interface with the 'Applications' tab selected. In the left sidebar, the 'Recently Viewed' list view is highlighted with an orange box. The main content area shows a list of applications, with the 'Recently Viewed' view selected.

Manage Applications with Kanban



The screenshot shows the 'Admissions Connect' interface with the 'Applications' tab selected. The Kanban view is active, displaying a workflow of application stages: Financial Aid/Scholars, Undergraduate Applications, Undergraduate Transfer, Started (0), Submitted (2), Received (0), Incomplete (1), In Review (1), and Waitlist (0). The 'Submitted' stage is highlighted with an orange box. The main content area shows a list of applications, with the 'Submitted' view selected.

Assign Reviewers from an Application List View



The screenshot shows the 'Admissions Connect' interface with the 'Applications' tab selected. The 'All Applications' list view is active, displaying a table of applications. The 'Assign Reviewers' button is highlighted with an orange box. The table has columns for Application Name, Applicant, Applying To, Application Type, Application Status, and Term.

	Application Name	Applicant	Applying To	Application Type	Application Status	Term
1	APP-0060	Nancy Hamilton	Financial Aid	Undergraduate	Incomplete	
2	APP-0061	Alex Garcia	BS Computer Science	Undergraduate	In Review	Fall 2022

Rapid Document Verification

Configure Document Checklist Items

- Accept or Reject Item
- Document Verification Permission Set
- Get specific with List Views
- Split list views for rapid verification
- Consider Validation Rules

Documents to Verify

7 items • Updated 3 minutes ago

Name ↑

Community College Official Transcript	3/15/2022, 9:06 AM	JRoss	Moustafa Transfer
Official Transcript suppl	3/15/2022, 9:06 AM		Sofia Applicant
Official Transcript suppl	3/15/2022, 9:06 AM		Sofia Applicant
Personal Statement suppl	3/15/2022, 9:06 AM		Sofia Applicant
Personal Statement JRoss	3/15/2022, 9:06 AM		Sofia Applicant
SAT Report JRoss	3/15/2022, 9:06 AM		Sofia Applicant

Document Checklist Item

Community College Official Transcript

Required ☒

Document Type Transcript

Status Pending

File Pertains To Moustafa Transfer

Page: 1 of 1

Automatic Zoom

Connected Community College Student Copy Undergraduate Record

Name: Moustafa Transfer

Student ID: 12345678

SSN: XXX-XX-1234

Birthdate: 02/04

Student Address: 950 East Paces Ferry Road NE

City: Atlanta, GA 30326

Print Date: 06/04/2021

Course: HUM 111

Description: Humanities II

Contact Hours: 3.00

Grade: A

Course: ECON 120

Description: Microeconomics

Contact Hours: 3.00

Grade: A

Term GPA: 3.930

Term Total: A

Attempt: 12.00

Exam: 12.00

Beginning of Undergraduate Record

2019 Fall Term

General Studies Major

Transfer Track

Subplan:

Course	Description	Term	Grade
MAT 167	Research and Analysis I	3.00	A
ENGL 101	English Composition III	3.00	A-
POL 101	American Politics	3.00	A
HIST 121A	United States History I	3.00	A
BIO 181	General Biology I	4.00	B+

2021 Spring Term

General Studies Major

Transfer Track

Subplan:

Course	Description	Term	Grade
ECON 210	Global Growth	3.00	A
MAT 166	Research and Analysis II	3.00	A
HIST 210	Western Civilization I	3.00	A
CALC 100	Calculus	4.00	A
STAT 100	Statistics	3.00	A

Information

Name

Community College Official Transcript

Status

Pending

Document Type

Transcript

Owner Name

Jenna Ross

Original Parent Record

APP-0064

File Pertains To

Moustafa Transfer

Instructions

Upload your official transcript

Rejection Reason

Required

Rejection Comment

Accelerate Application Review

Queues and Mass Actions

Configuration with Omni-Channel Routing

If your organization uses Omni-Channel, you can link queues to a routing configuration. This will push work from the queue to the routing configuration.

Routing Configuration

Supported Objects

Select the objects you want to assign to this queue. Individual records for those objects can then be owned by this queue.

Available Objects	Selected Objects
Alumni Directory Entry Apple Config Applicant Application (Installed Package: EDA) Application_old Appointment LiveMessage Appointment AsyncRequest Attendance Event Attribute Attribute Set Authorization Form Authorization Form Consent Authorization Form Data Use	--None--

Queue Members

To add members to this queue, select a type of member, then choose the group, role, or user from the "Available Members" not need to assign users to the queue, as all users already have access to the records for those objects.

Search: for:

Available Members		Selected Members
User: Brenda Service User: Casey Career User: Chet Callaghan User: Cindy Central User: Dean Cloudly User: Einstein User User: Elliot Executive User: Ely International User: Gordon Reeves User: Harry Long User: Helen Roberts User: Insights Integration User: Integration User User: Integration User	Add ▶ Remove ◀	--None--

- Service Setup > Queues
- Any user in the queue can claim an Application Review
- Access queues from list views
- [Route cases directly to a specific queue with Flow](#)

Curate Custom Feedback Questions

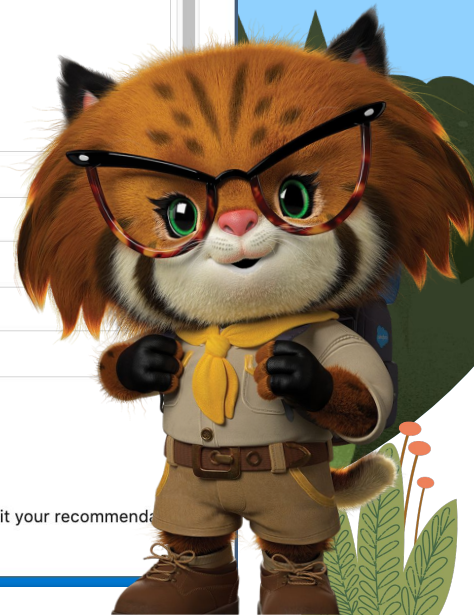
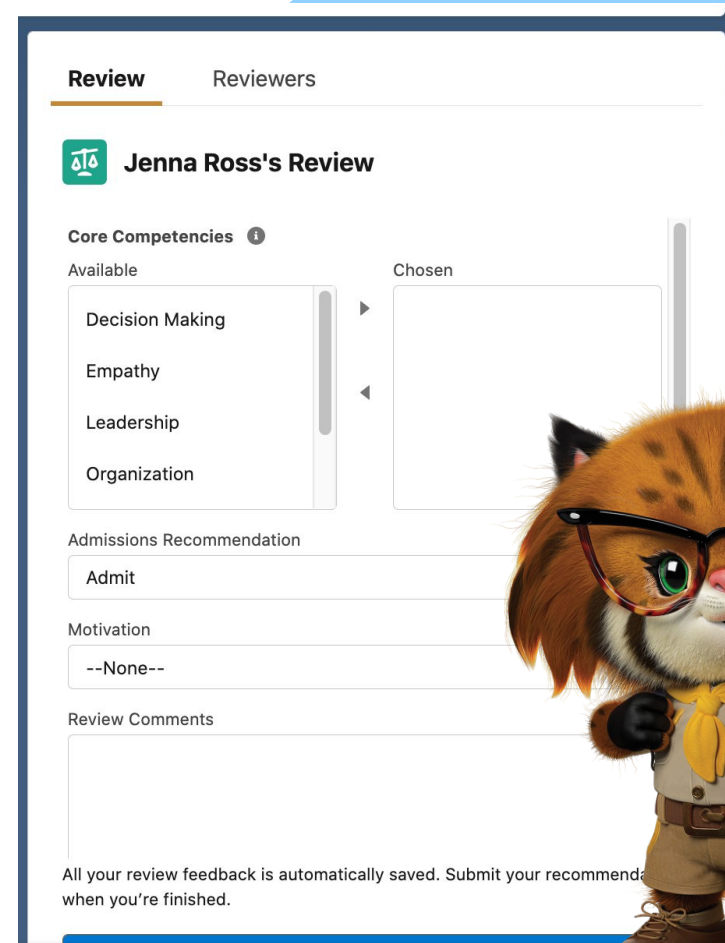
Set up reviewer feedback questions

1 Plan your questions and who should answer

2 Create Custom Fields as needed

3 Edit or create a custom field set to match the review need

4 Configure visibility on the lightning record page



Simplify the Work of Reviewers

And power data quality too

 salesforce.org



Required Fields
and Default
Values



In-App Guidance
Help Text



Validation
Rules



Bring reviewers together:
[Build an Admissions Connect Portal](#)

Recommendations

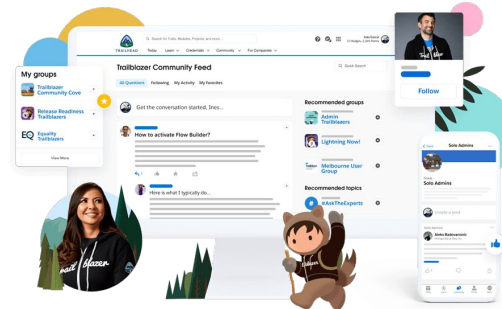
Learn next steps and discover
helpful resources



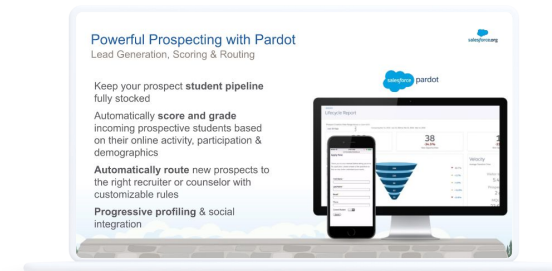
Three Things You Can Do Today



[Explore Trailhead](#)



[Go to the Trailblazer Community](#)



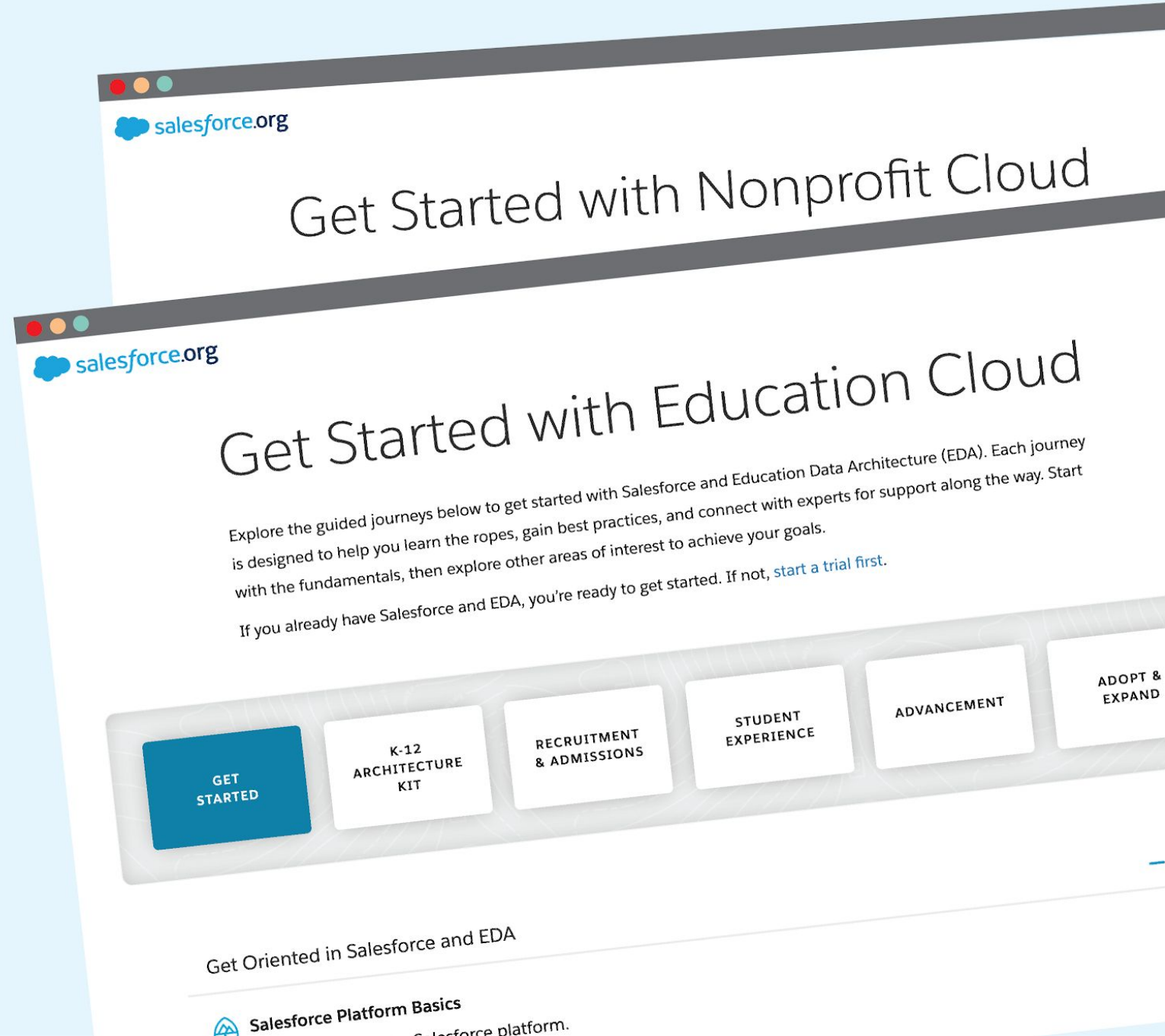
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Thank You