Oracle
Sales Cloud
Using Sales for Higher Education

Release 12
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Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon to access Oracle Applications Help in the application. If you don’t see any help icons on your page, click the Show Help icon in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

Watch: This video tutorial shows you how to find help and use help features.

Additional Resources

- Community: Use Oracle Applications Customer Connect to get information from experts at Oracle, the partner community, and other users.

- Guides and Videos: Go to the Oracle Help Center to find guides and videos.

- Training: Take courses on Oracle Cloud from Oracle University.

Documentation Accessibility

For information about Oracle's commitment to accessibility, see the Oracle Accessibility Program.

Comments and Suggestions

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1 About This Guide

Audience and Scope

This guide is intended for student recruiters and admissions coordinators who are involved in using Oracle Sales Cloud for Higher Education.

This guide provides information about how student recruiters and admissions coordinators perform routine business tasks specific to student recruitment.

Related Guides

You can refer to the following related guides to understand more about the business flows and functionalities covered in this guide.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Using Sales</td>
<td>Describes user tasks to help sales managers, salespeople, and other sales end users perform day-to-day business tasks.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Creating and Administering Analytics</td>
<td>Provides advanced instruction on creating and customizing Sales Cloud analytical and reports.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Leads</td>
<td>Describes user tasks for creating leads and managing the various aspects of leads.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Getting Started with Higher Education Implementation</td>
<td>Describes how to set up and configure Oracle Sales Cloud for Higher Education either while implementing or after implementing Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Sales</td>
<td>Describes tasks to configure and set up Sales.</td>
</tr>
</tbody>
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Related Topics

- Oracle Help Center
2 Overview

Higher Education: Overview

The higher education application enables you to plan, manage, and track your student recruitment activities.

As a student recruiter or admissions coordinator for your institution, you can use the following key capabilities:

- Capture information about student inquiries and prioritize outreach efforts.
- Manage inquiries and constituent data.
- Plan outreach activities with organizations, inquiries, or contacts from the organizations.
- Use the social networking functionality to collaborate on outreach activities.

Terms and Definitions

Oracle Sales Cloud for Higher Education uses terms that are referred to differently in Oracle Sales Cloud. The following table describes the difference in terminology.

<table>
<thead>
<tr>
<th>Term in Oracle Sales Cloud for Higher Education</th>
<th>Term in Oracle Sales Cloud</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constituents</td>
<td>Contacts</td>
<td>Constituents in higher education are prospective students; contacts from an organization such as teachers, administrators, coaches or human resource representatives; and people related to prospective students such as parents, relatives, or friends.</td>
</tr>
<tr>
<td>Inquiries</td>
<td>Leads</td>
<td>Inquiries for prospective students refer to information related to a student’s academic interests, entry year, and academic level.</td>
</tr>
<tr>
<td>Organizations</td>
<td>Accounts</td>
<td>Organizations are high schools, community colleges, or other colleges or universities for students. Organizations can also be the place of employment for students who pursue part-time studies alongside their paid employment.</td>
</tr>
<tr>
<td>Programs of Interest</td>
<td>Product Groups</td>
<td>Programs of interest refer to the programs that a prospective student might be interested in such as art, biology, history, chemistry, and so on.</td>
</tr>
</tbody>
</table>
Sample Process Flow

The following figure illustrates a sample process flow for student recruitment.

The administrator receives prospective student data and adds them to the application. The prospective student data is then assigned to the recruiting staff such as admissions coordinators or student recruiters, who execute the student recruitment activities in the following way:

- Institutions are added as organizations and contacts for the specific organization are added as organization constituents.
- The student recruiter plans outreach activities at the institution to meet prospective students.
- Inquiries are created for the prospective students and are further qualified depending on various parameters.
- The student recruiter follows up through meetings, calls, and e-mails and successfully gets the student to apply for admission to their institution.
3 **Student Recruitment**

**Student Recruitment: Business Scenario**

This example illustrates a business scenario where you as a student recruiter or an admissions coordinator must execute certain tasks to recruit students from an institution. The example also illustrates when and how you may use the various entities such as Organization, Constituents, Inquiries, Assessments and Qualifications, Activities, Households, Territories, and so on in a student recruitment process.

**Scenario**

Prodigious Academy is one of the top feeder schools of incoming students for Vision College. Lucy Hall, a student recruiter at Vision College, is assigned Prodigious Academy. She also receives a few inquiries from students who attend Prodigious Academy. She plans to work with the student counselors at this school to schedule recruiting events, so that she can meet more prospective students.
The following figure explains how the different entities and people interact with each other.

Working with Organization Constituents

Lucy works with organization constituents in the following way:

- Adds the student counselors as organization constituents.
- Sets an appointment with the student counselors at Prodigious Academy using the activities section under organizations.
• Schedules meetings and provides current information and materials on Vision College to the student counselors, that the counselors can pass on to their students and answer questions about the admissions process.

Working with Student Inquiries

Lucy works with student inquiries in the following way:

• Creates a constituent for every student to make a unique person record to associate with an inquiry.
• Creates an inquiry for each constituent using the Inquiries tab under Constituent or Organizations or by clicking Create Inquiry on the Inquiry Search page.
• Sends e-mails about her next visit to Prodigious Academy.
• Prioritizes inquiries based on the information she receives and schedules calls for the high-priority inquiries.

Working with Inquiry Relationships and Qualifications

Lucy uses inquiry relationships and qualifications in the following way:

• If Lucy meets new prospective students at the school visit, she adds them to the application as a new constituent and creates an inquiry along with the programs of interest.
• If any student has relatives who have been to Vision College, she records those relationships and marks the inquiry as high priority.
• After a few days, Lucy calls the prospective students from her high-priority inquiries from Prodigious Academy. She asks them questions to gauge their interest and further qualifies the inquiries based on their answers. She also updates the major points from their conversation as notes.

Planning Follow-up Activities

Throughout the year, Lucy keeps track of all the students from her high-priority inquiries, schedules additional meetings, calls, and activities with the prospective students and associated organizations with the goal of motivating the students to apply for admission.
4 Managing Organizations

Organizations: Overview

Organizations are high schools, community colleges, or other colleges or universities for students. Organizations can also be the place of employment for students who pursue part-time studies alongside their paid employment.

As an admissions coordinator or student recruiter, you must first create and update an organization before recruiting prospective students from that organization. You can then work to establish relationships with constituents in these organizations, so that the constituents can partner with the student recruiter to coordinate outreach programs.

Information associated with organizations is managed through components such as overview, profile, team, constituents, inquiries, relationships, notes, assessments, activities, and conversations. The following sections describe some of these components.

Note: Organizations in Higher Education are known as Accounts in Oracle Sales Cloud.

Organization Profile

An organization profile refers to the various types of information recorded against an organization. Examples of information types are: organization type, proprietorship, school type, contact information, and so on. As a student recruiter or an admissions coordinator, you can view, add, update, and delete information about an organization to plan your outreach activities.

Organization Team

Organization team helps you view, add, update, and delete team members assigned to an organization, so that only the applicable people work with an organization. As an admissions coordinator or a student recruiter, you can use the Team subtab on the Edit Organization page to also define the access and function for a person. In addition to a student recruiter, you can also add admissions specialists or other contacts from your institution who may work on the outreach activities for the organization.

You can also view territory assignment from the Team subtab by selecting territories from the Show drop-down list.

Note: You can manually run territory assignment for the constituent through the Run Assignment process.

Organization Constituents

Organization constituents are the contacts at an organization such as student counselors, teachers, coaches, administrators, or human resource representatives. The student recruiter interacts with these organization constituents while planning outreach programs or visits and provides them with information about the academic institution they are representing.
From the Constituents subtab on the Edit Organizations page, you can either view or edit an existing constituent or create a new constituent record for the organization.

For example, Robert James is the head college counselor at Prodigious Academy. The student recruiter schedules school visits and activities through Robert. Alternatively, Robert also contacts the student recruiter, if a high-school student has questions related to the institution represented by the student recruiter.

**Organization Inquiries**

Organization inquiries are prospective students from an organization interested in enrolling in your institution. You can view and select existing inquiry records for an organization or add new inquiries for an organization using the Inquiries subtab on the Edit Organization page.

**Organization Relationships**

Organization relationships show how an organization is related to other organizations within or outside your institution. For example, a competitor organization or a sister organization can be added as one of the relationships. You can also add the constituents from other organizations as relationships. For example, for a high school where college attendance is low, you may want to work with the school to host an event for all feeder middle schools to that high school, with the goal of promoting higher education. You can use these relationships to plan and promote such events.

**Organization Assessments**

Organization assessments help you assess an organization based on a template of predefined questions. The responses entered for a particular organization determine the score for an organization, which helps you determine the amount of time to invest in recruiting activities at that organization.

**Organization Activities**

Organization activities are appointments, tasks, calls, and so on for an organization. As a student recruiter or admissions coordinator, you can view, add, update, and delete such activities, and manage communication with an organization.

**Organization Conversations**

Organization conversations help you collaborate with other student recruiters over the Oracle Social Network, which is integrated with the Oracle Sales Cloud for Higher Education. You can have an active conversation about an organization that you are assigned to and can manage your recruitment activities by participating with other student recruiters.

**Related Topics**

- Sales Accounts: Explained
- Inquiries in Oracle Sales Cloud for Higher Education: Overview
- Constituents in Oracle Sales Cloud for Higher Education: Overview
Creating an Organization: Procedure

You can either create organizations or import them using the file-based import option.

To create an organization:

1. Sign in to Oracle Sales Cloud using a Student Recruiter or an Admissions Coordinator role and navigate to the Organizations page.
2. Click Create Organization.
3. Provide the organization details.

   You typically enter Organization Type and Proprietorship.

4. If the Organization Type is school, specify the School Type, and External Code.
5. Specify the Primary Contact at the organization.
6. Click Save and Close.
5 Managing Constituents

Constituents: Overview

Constituents in Oracle Sales Cloud for Higher Education are:

- Prospective students.
- Contacts from an organization such as, teachers, administrators, coaches, or human resource representatives.
- People related to prospective students such as parents, relatives, or friends.

Each constituent record contains biographical information, phone, e-mail, and address related information for the person. There must be only one constituent record for each person.

Information about the constituent is managed through components such as overview, profile, team, inquiries, relationships, notes, activities, and conversations. The following section discusses some of these components.

Note: Constituents are known as Contacts in Oracle Sales Cloud.

Constituent Profile

Constituent profile refers to the biographical and demographic information about a constituent. Biographical information includes details such as, address, gender, date of birth, legal name, preferred name, and so on. Demographic information includes details such as citizenship status, military status, race, ethnicity, and so on. Additionally, student recruiters and other admissions staff can filter constituents as favorites by checking the Favorite Constituent check box on the constituent profile page.

Constituent Team

Constituent team refers to the recruitment team assigned to an individual constituent. Usually, institutions assign recruiters to an organization or inquiry but there may be circumstances where you must assign a recruitment team to an individual constituent. As an admissions coordinator, you can use the Team subtab on the Edit Constituent page to assign one or more student recruiters to the same constituent.

You can also view territory assignment from the Team subtab by selecting territories from the Show drop-down list.

Constituent Inquiries

After creating a constituent record, you can collect additional details related to the academic interests of the prospective student by creating one or more inquiry records. Based on the practices of your institution, separate inquiries can be created when a prospective student has more than one academic interest, expresses interest in multiple admit periods, or is recruited for multiple academic levels (for example, Freshman and then Transfer). This helps you plan separate outreach activities for each inquiry.
Constituent Relationships

Constituent relationships show how a constituent is related to other organizations, constituents, and households within or outside your institution. For example, as a student recruiter or an admissions coordinator, you can view, add, update and delete other constituents belonging to the same organization or people related to a prospective student as relationships for the constituent. You can then use this information for outreach activities.

For example, you can add an alumna related to the prospective student as a relationship, so that others on the team are aware of this important information.

Constituent Conversations

Constituent conversations enable you to view or add conversations for a constituent and create conversations on the Oracle Social Network wall as well.

Related Topics

- Manage Contacts: Explained
- Inquiries in Oracle Sales Cloud for Higher Education: Overview
- Organizations in Oracle Sales Cloud for Higher Education: Overview

Creating a Constituent: Procedure

You can create constituents or import them using the file-based import option.

Sign in to Oracle Sales Cloud using a Student Recruiter or an Admissions Coordinator role and use one of the following methods to navigate to the Create Constituents page:

- Click the Constituents subtab on the Edit Organizations page. Click Add: Constituents. On the Add: Constituents page, click Create Constituent.
- Click Create Constituent on the Constituent list or search pages.

To create a new constituent record:

1. Provide the biographical and demographic information related to the constituent on the Create Constituent page.
   - Select Organization, if you are adding the constituent for an organization, such as counselors, teachers, coaches, and so on.
   - Do not select Organization, if you are adding constituent for an inquiry. Use the Inquiry page for organization association.

2. Click Save and Close.
6 Managing Inquiries

Inquiries: Overview

This topic provides information related to inquiries in Oracle Sales Cloud for Higher Education.

You can add inquiries for prospective students to gather more information about the student’s academic interests, entry year, and academic level. A prospective student constituent may have multiple inquiries, if he or she is actively pursuing more than one academic interest or is being recruited for more than one admission entry period. Your institution must establish procedural guidelines on when to create multiple inquiries per prospective student constituent. This information helps the student recruiter to communicate, counsel, or assist the student’s decision to apply and attend the academic institution you represent.

Information about an inquiry is managed through components such as summary, previous schools, qualification, team, activities, notes, conversations, and so on. The following section discusses some of these components.

Note: Inquiries in Higher Education are known as Leads in Oracle Sales Cloud. For more information about Leads, see Oracle Sales Cloud: Using Leads guide.

Inquiry Summary

With Inquiry Summary, you can record, view, edit, and delete information related to the academic background and academic interests of a prospective student. Inquiry summary components include organization, institution, academic level, campus, admit level, admit period, current GPA, class rank percentile, highest education level, and so on.

As a student recruiter or an admissions coordinator, you can:

- Collect detailed inquiry source information and track how effective each inquiry source is for recruiting students.
- Enter self-reported test scores and counsel prospective students on potential admissibility based on this information.
- Set priority flags, such as First Generation College Student, International Student, Enrolled in AP courses, Financial Aid Interest, or Scholarship Interest, so that you can use this information to inform your recruiting staff.
- Record the residential status and housing preference of a prospective student.
- Get a constituent’s profile information by clicking the Existing Constituent link.
- Define your own values and attach tags to a prospective student from the Prospective Student Tag field. The tags highlight an attribute and work as indicators attached to a prospective student, which assist with recruitment.
- Add one or more programs of interest for a student by selecting the Add option on the Edit Inquiry, so that you can provide guidance and resources specific to their academic interests.

If you are integrating to Student Engagement (Oracle Eloqua Marketing Cloud for Higher Education), preventing duplicate records is critical. Each inquiry record has a unique ID in Student Engagement. If a new inquiry record is created with similar data as of an existing inquiry record with a unique ID, you will receive an error message. This data creates a field called Prospect Program Interest Key, which ensures that you do not create duplicate inquiry records for your institution.

You must populate the Prospect Program Interest Key by customizing the data that define the Prospect Program Interest Key, based on your business practice and prospective student data. For more information about working with inquiry records, see Oracle Sales Cloud Getting Started with Higher Education Implementation guide.
Inquiry Previous Schools

As a student recruiter or an admissions coordinator, you can record information about previous schools that the prospective student has attended. You can enter self-reported dates of attendance, grade point average, and degrees for each school attended by the prospective student, using the Previous Schools subtab on the Edit Inquiry page. You can use this data for qualifying inquiries and suggesting suitable programs that your institution can offer to the student.

Inquiry Team

Inquiry team refers to the recruitment team which, apart from a student recruiter or an admissions coordinator, can consist of alumni or current students from your institution, admissions specialists, or other representatives of the organization who may work on outreach activities for inquiries.

As an admissions coordinator, you can use the Team subtab on the Edit Inquiries page to assign one or more student recruiters to the same Inquiry. You can also view territory assignment from the Team subtab by selecting territories from the Show drop-down list.

⚠️ **Note:** You can manually run territory assignment for the constituent through the Run Assignment process.

Inquiry Qualifications

Inquiry qualifications enable you to measure an inquiry's interest in your institution through a questionnaire. You can judge the investment you make into recruiting the prospective student.

Inquiry Activities

Inquiry activities enable you to manage appointments, tasks or calls for an inquiry, and plan and execute your outreach activities efficiently.

Inquiry Conversations

Inquiry conversations enable you to view, add, and participate in Oracle Social Network conversations for an inquiry. You can have an active conversation with recruiters on your team to share information and manage outreach activities for this inquiry.

**Related Topics**

- Qualifications and Assessments in Oracle Sales Cloud for Higher Education: Overview
- Organizations in Oracle Sales Cloud for Higher Education: Overview
- Constituents in Oracle Sales Cloud for Higher Education: Overview
Creating an Inquiry: Procedure

You can create a new inquiry using one of the following methods:

- From the Inquiry subtab on the Edit Organization page. Use this option when you have inquiries from prospective students attending that organization.
- From the Inquiry subtab on the Edit Constituent page. Use this option if you have searched for and located an existing constituent record to associate with an inquiry. You can create multiple inquiries for the same constituent.
- From the list page of Inquiries.

On the Create Inquiry page, perform the following steps to create a new inquiry record:

1. Select Existing Constituent from the list to associate a constituent record with an inquiry. If you do not see your constituent in the list, click Search.
   a. On the Constituent Search page, enter the required criteria to search for your constituent.
   b. If the constituent does not exist, click Create Constituent to add a new constituent record. Select the newly added constituent.
2. Select Academic Level and Institution for the inquiry.
3. Specify other optional details, if required.
4. Click Save and Close.

After you save the newly created inquiry, the inquiry name is automatically generated by linking the constituent name and the date and time of inquiry creation. For example, an inquiry with a creation date 5/15/15 at 4:30pm for a constituent name Joshua J Smith, is automatically named as Joshua J Smith 5/15/16 4:30 PM.

FAQs for Managing Inquiries

Why do I need to select an existing constituent while creating a new inquiry?

A constituent record includes biographical and demographic information about a constituent. An inquiry record may not include constituent information, so you must associate it to an existing constituent.

What happens if I change the existing constituent for an inquiry?

When the existing constituent name is changed, the inquiry is associated with the constituent record entered. The inquiry name is not updated with the new existing constituent name, so you must make this change manually.
Can I add people other than student recruiters to the inquiry team?

Yes. You can have team members such as alumni contact or a student contact on the team, who can contact the prospective student to talk to them about academic life at your institution. Individuals whom you want to add as team members must be set up as users in the application.

How can I prioritize my inquiries?

Use the **Priority** drop-down list on the Inquiry Summary page to prioritize your inquiries as Hot, Warm, or Cold. You can use inquiry and constituent data such as first generation, Grade Point Average, and relationships to determine priority based on your institution’s recruiting goals. Additionally, you can define and use Qualification templates to gather additional information from the inquiry. This helps you decide the amount of follow-up or support that you must provide for a constituent.

What are organization inquiries?

Organization inquiries are inquiries from constituents which are formally or informally associated with a particular organization. For example, after your visit to Prodigious Academy as a student recruiter, you can add inquiries for all the prospective students you interact with. When you directly add inquiries from the Inquiries subtab on the Edit Organization page, each inquiry is automatically associated with the corresponding organization. You must create constituent records for each prospective student, if they are not added to the application.

Can I create multiple inquiries for a constituent or an organization?

Yes. There can be multiple inquiries for a constituent. For example, you must create multiple inquiries for a constituent when the student is interested in multiple admit periods such as fall or winter, student has more than one academic interest, or if the student is being recruited for multiple academic levels such as undergraduate and then graduate.

The institution must determine procedures and guidelines for creating multiple inquiry records. In case of an organization, inquiry records are created for all the prospective students from a particular organization, resulting in multiple inquiries for that organization.

What are admit level and admit period of an inquiry?

Admit level is the academic level of an inquiry seeking enrollment into an institution. Examples of admit level are first year, transfer, 2nd degree, and so on.

Admit period for an inquiry is the time frame for which the student is interested in being admitted to the institution. Examples of admit period are Summer 2016, Fall 2016, Spring 2017, Summer 2017, Fall 2018, and so on.
7 Using Assessments and Qualifications

Assessments and Qualifications: Overview

Assessments enable student recruiters to further qualify inquiries and assess outreach potential at the organizations.

Administrators define assessment templates that consist of questions with scored responses and then make the assessments available on the Inquiry Qualifications subtab and the Organization Assessments subtab. During the assessment process, the student recruiter is presented with a set of predefined questions. The responses to these questions result into an immediate scoring and recommendations or follow-up tasks.

Assessments consist of the following components:

- Questions
- Question ratings
- Responses, including free-form responses
- Score of the assessment
- Tasks to be performed based on feedback score

⚠️ Note: Only administrators can create assessments. For more information about how to set up and implement assessments in Oracle Sales Cloud, see Oracle Sales Cloud Implementing Sales guide and Oracle Sales Cloud Using Sales guide.

Example

The student recruiter completes an assessment for an inquiry that includes questions about grade point average, level of interest in visiting campus, and response to e-mails. If the score is high, the student recruiter proceeds with the outreach activities for the inquiry by scheduling phone calls and assigning a current student to contact them using Twitter, with the goal of getting the student to complete an admissions application prior to the application deadline.

Related Topics

- Lead Qualification: Explained
- Creating Assessment Templates: Procedure
8 Using Activities

Activities: Overview

As a student recruiter or an admissions coordinator, you typically use activities to:

- Plan outreach activities, including scheduling meetings or following up using phone or e-mails.
- Check your calendar for tasks or appointments that you have on any particular day.
- Create notes for any additional information that you must record regarding your task or an appointment.
- Check the calendar of your team members to coordinate recruitment activities for an inquiry. As an admissions coordinator, you can use the Team Calendar to view or edit the calendars of your team members.

To manage activities for:

- A prospective student, use the Activities subtab on the Edit Inquiry page for that constituent.
- A contact within an organization, use the Activities subtab on the Edit Constituent page. Specify the organization for a task, appointment, or call that you schedule.

For more information about activities, appointments, tasks, and notes and how to search and view them, see Activities in the Oracle Sales Cloud Using Sales guide.

Related Topics

- Activities: Explained
9 Using Households

Households: Overview

A household is a group of constituents generally sharing a common link or an association. Usually all constituents in a household reside at the same address. Household information is managed through components such as overview, profile, team, constituents, inquiries, relationships, notes, assessments, activities, and conversations.

You can add relationships to other households, constituents or inquiries who may not be a part of the household but are influential, and then view these relationships using the List View or Diagrammer View.

Using Households: Example

This example illustrates how households and constituent relationships can be used to influence prospective students to enroll in your organization.

Scenario

The Jones household has Lynda Jobs (mother), Liam and Lorissa (siblings) as constituents. Liam is a high school student at Prodigious Academy. Lorissa is a high school junior attending a private preparatory school in a different state. Liam’s friend, Rina, is an alumnus of Prodigious Academy who is currently attending Vision College.
The following figure illustrates the above scenario.

Working with the Household

Liam is a prospective student for Vision College and Lorissa, his younger sister, is also looked upon as a prospective student entry the following year. Lynda, is an alumnus at Vision College and influences her children’s decision of selecting the college they want to attend. In this scenario, the student recruiter acknowledges her alumnus status while recruiting Liam and Lorissa. The admissions coordinator sets up a Jones household, so that the student recruiter has the information to coordinate recruitment activities for both Liam and Lorissa.
Working with Other Students at the Institution

Liam’s friend Rina, an alumnus at Prodigious Academy, is a current student at Vision College and therefore influences Liam’s perception of Vision College. The student recruiter adds Rina as a relationship to the household to use the information for Liam’s recruitment activities.
10 Using Assignments

Assigning Inquiries and Organizations to Student Recruiters: Overview

This topic provides an overview of how you can use territory-based assignment and rule-based assignment to assign organizations and prospective student inquiries to student recruiters.

Organizations can be assigned to student recruiters only by using territory-based assignment. Inquiries can be assigned to student recruiters either by using territory-based assignment or rule-based assignment, however your institution must use any one type of assignment based on your requirements. Use territory-based assignment when your institution's requirements can be addressed using the available territory dimensions, including the configurable auxiliary dimensions. Use rule-based assignment when your institution needs to use additional delivered or custom attributes not
available for use in territory-based assignment. The following figure illustrates the specific assignment type that you must use for inquiries and organizations.

**Territory-based Assignment**

You can use territories to automatically assign inquiries, and organizations to your student recruiting staff. As an administrator, you can create and manage territories as directed by the admissions coordinator, to ensure that prospective student records and organizations get automatically assigned to the respective student recruiters for outreach activities.
Territory-based assignments work by matching territory dimensions to attributes on the organization or inquiry records. Territory dimensions define jurisdictional boundaries of territories. The following table describes the various territory dimensions available to inquiries and organizations.

<table>
<thead>
<tr>
<th>Dimensions</th>
<th>Dimension Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geography</td>
<td>Available to both organizations and inquiries</td>
</tr>
<tr>
<td>Account Type</td>
<td>Available to both organizations and inquiries</td>
</tr>
<tr>
<td>Customer Size</td>
<td>Available if the inquiry is associated with an organization</td>
</tr>
<tr>
<td>Industry</td>
<td>Available if the inquiry is associated with an organization</td>
</tr>
<tr>
<td>Organization Type</td>
<td>Available if the inquiry is associated with an organization</td>
</tr>
</tbody>
</table>

**Note:** Additional dimensions based on selected classification categories to match specific customer or partner information are also available to inquiries such as, business unit, product, and sales channel.

You can set up territory-based assignments to occur automatically on record creation, on-demand, or as a combination of both.

### Using Territory Dimensions: Example

The following example uses geographical location and organization type as territory dimensions and illustrates how territory dimensions are used to automatically assign inquiry and organization records to admissions coordinators and student recruiters. The Vision College Undergraduate Admissions office has many student recruiters and must assign organizations, inquiries, and households to each student recruiter. The following table describes the territory types and their dimensions, which the sales administrator has to configure based on the institutional requirements.

<table>
<thead>
<tr>
<th>Territory type</th>
<th>Territory dimension</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type 1</td>
<td>All organizations and inquiries associated with organization type of businesses, foundations, and nonprofit organizations, regardless of geography. This territory type assigns all such records to a student recruiter specializing in this area.</td>
</tr>
<tr>
<td>Type 2</td>
<td>All organizations and inquiries associated with organization type of school and geography located within the Mid-West region and Western United States.</td>
</tr>
<tr>
<td>Type 3</td>
<td>All organizations and inquiries associated with organization type of school and geography located within the East-Coast region and Southern United States.</td>
</tr>
<tr>
<td>Type 4</td>
<td>All organizations and all geographies. This global territory type identifies any unassigned records.</td>
</tr>
</tbody>
</table>
Rule-based Assignment

You can create rule sets and assign them to a resource so that specific inquiry records get automatically assigned to the student recruiter. A rule set is a combination of attributes that you can customize as per your institutional requirements.

Using Rule-based Assignment: Example

The following example uses a combination of attributes to create a rule set. The Vision College Undergraduate Admissions office plans for specific rule sets to address its complex institutional requirements. The following table describes the attributes used to create specific rule sets.

<table>
<thead>
<tr>
<th>Rule type</th>
<th>Rule set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule 1</td>
<td>• Rule: Undergraduate, Freshman, Fall 2018</td>
</tr>
<tr>
<td></td>
<td>• Rule attributes: Academic level, admit level, and admit period</td>
</tr>
<tr>
<td>Rule 2</td>
<td>• Rule: Undergraduate, Transfer, Fall 2018</td>
</tr>
<tr>
<td></td>
<td>• Rule attributes are same as above, but with different values</td>
</tr>
<tr>
<td>Rule 3</td>
<td>• Rule: Graduate, Fall 2018</td>
</tr>
<tr>
<td></td>
<td>• Rule attributes: Academic level and admit period</td>
</tr>
</tbody>
</table>

**Note:** You can only assign inquiries using rule-based assignment. Organizations must always be assigned using territory-based assignment. For more information on setting up territory-based assignment and rule-based assignment, see the Oracle Sales Cloud Getting Started with Higher Education guide.

Related Topics
- Assigning Inquiries Using Rule-based Assignment: Simple Example
11 Using Social Networking

Social Networking: Overview

Oracle Sales Cloud for Higher Education is integrated with the Oracle Sales Cloud Social Networking. The Conversations functionality is a part of the Oracle Sales Cloud Social Networking.

Conversations support collaboration and communication among admissions staff enabling them to work effectively on outreach activities. As an admissions coordinator or a student recruiter, you can create and contribute to conversations about specific organizations, constituents, and inquiries from the Conversations subtab. You can also monitor both, active conversations and new conversations using the social infolet on the landing page.

Using Conversations: Example

The example illustrates how you can use Conversations to collaborate and effectively manage your outreach activities with other student recruiters or admissions coordinators.

Dennis is coordinating a visit to Prodigious Academy. Dennis will be traveling with Emily, another student recruiter in the office, who is responsible for preparing and bringing printed materials. To support their collaboration, Dennis opens the Prodigious Academy organization record and initiates a conversation from the Conversations subtab. Dennis and Emily use this conversation to prepare for their visit, inviting others in the office to participate when necessary. Their manager, Michele, follows the conversation, so that she can approve any additional expenses associated with the visit, and ensure that vital information is not missed in the preparation.
Glossary

**academic level**
Academic level are categories of programs, for example, undergraduate, graduate, certificate, and continuing education, which can be used to assign inquiries to the appropriate student recruiters.

**admissions coordinator**
Admissions coordinators manage student recruiters and assign organizations and inquiries to them based on defined territories for the upcoming recruiting season, depending on the enrollment goals set by the academic institution.

**admit level**
Admit level is the academic level the inquiry would enter upon enrolling into an institution. Examples of admit level are first year, transfer, 2nd degree seeking, and so on.

**admit period**
Admit period for an inquiry is the time frame for which the student is interested in being admitted to the institution. Examples of admit period are Summer 2016, Fall 2016, Spring 2017, Summer 2017, Fall 2018, and so on.

**constituent**
Constituents are prospective students; contacts from an organization such as teachers, administrators, coaches or human resource representatives; and people related to prospective students such as parents, relatives, or friends.

**inquiry**
An inquiry is created to manage specific recruiting efforts and is defined by the program of interest, academic level, admit period, and other data related to academic history and interest of the prospective student constituent.

**organization**
Organizations are high schools, community colleges, or other colleges or universities for prospective students. Organizations can also be the place of employment for students who pursue part-time studies alongside their paid employment.

**organization constituent**
Organization constituents are the contacts at an organization such as student counselors, teachers, coaches, administrators, or human resource representatives, whom the student recruiter interacts with to plan outreach activities.

**programs of interest**
Programs of interest refer to the academic programs that a prospective student might be interested in such as art, biology, history, chemistry, and so on.
**prospective student**
A prospective student is someone who has expressed interest in enrolling to your institution.

**student recruiter**
Student recruiters are representatives of an academic institution assigned to organizations and inquiries for recruiting purposes.

**territory**
The jurisdiction of responsibility of a student recruiter or admissions coordinator over a set of inquiries and organizations. Territories serve as a basis for planning outreach activities and recruiting prospective students.