Dear Colleagues,

I would like to provide further insight to assist Programs/Recruiters for the upcoming transition.

A) IMPORTING

Please refer to this guide to import email communications from Radius to Salesforce. The priority order of communication import is as follows:

1. Applicant emails and invitation letter templates that invite applicants to pay invoices
2. Recruitment/Case templates
3. Student Services templates

B) APPLICATION/INVOICES

Application and invoice emails need to be added immediately. All other templates can be exported from Radius and uploaded at a later date.

C) STANDARDIZED TEMPLATES

There are number of items that need to be consistent with all Chapman templates.

- Chapman Logo (see attached)
- Font: Calibri (font used by Office of the Provost and President)
- Name of the template: Program ID in uppercase + Purpose of the email.
- Example: "MSF Next Steps"
- Signature

Below is an example of a signature using the department info. To generate your signature visit: https://brand.fiu.edu/toolkit/email-signature-generator/

D) EMAIL VERIFICATION

By today, Monica will have set up your department/program emails in Salesforce. Please ensure to notify whoever is managing your department emails to keep an eye out as you will receive an email from Salesforce to verify the address.

E) TRAINING

We will have a couple trainers for the transition and are currently planning a training session for this coming Thursday. A calendar invite will be sent via separate cover.

We are also creating an email account to gather questions and assist throughout this process.

F) HOMEWORK

Meanwhile, we need all program managers and recruiters to review the following tutorials *prior* to Thursday's training:

Training for Pipelines in Salesfore
 How to View and Update all Applicants Opportunities
How to view all create invoices
How to create Invoices
 List Views for recruitment- Applicants- How to create List Views for Recruitment in Sales Force- Applicant Opportunities

Please bookmark the link below as a reference guide. All training materials and reference documents will be uploaded to this website.

https://cobcrm.fiu.edu/blog/

Lastly, if you do not have access to Salesforce yet, please let us know.

If you have any questions in the meantime, please contact Isabel Lopez at lopezi@fiu.edu or Teams.

Best,
Angel

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