

From: [Angel Burgos](#)
To: [COB Program Managers](#)
Cc: [Marina Brillas](#); [William Hardin](#); [Robert Rodriguez](#)
Subject: Salesforce Memo #3
Date: Tuesday, May 30, 2023 1:37:01 PM
Attachments: [image002.png](#)
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Dear Colleagues,

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I hope everyone had an enjoyable weekend.

As we continue our Salesforce implementation, I would like to remind you that Marina Brillas (our Lead Salesforce Administrator) is now your main point of contact for any inquiries regarding Salesforce. If you have any questions regarding Radius, you can contact Monica Lamadriz.

In the past few weeks, we have made a lot of progress, and we thank you for your hard work and dedication in using our new CRM system. Here is a recap of the things you should be doing in Salesforce:

1. Email templates: they should have been moved from Radius to Salesforce. You can also create new templates as needed.
2. Pipeline: all recruiters should now be managing their pipeline from Salesforce
3. Admissions cases: everyone should be creating Cases in Salesforce
4. Invoices:
 - a. Creating new invoices: students will receive the automated Invitation letter template that you all created.
 - b. Closing invoices

You can refer to [this link](#) for trainings and resources created to help with Salesforce.

My best to all,

Angel J. Burgos

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