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To: [COB Program Managers](#); [Monica Lamadiz](#); [Greter Mojena](#); [Marina Brillas](#)
Cc: [William Hardin](#); [Robert Rodriguez](#); [Jeffrey Heebner](#); [Anjit Sengupta](#); [Anezka Martinez Sousa](#); [Jacqueline Sousa](#)
Subject: Salesforce Memo #4
Date: Tuesday, June 27, 2023 5:20:44 PM
Attachments: [image006.png](#)
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Dear Colleagues,

We have made great strides in the last few weeks. Thank you, as always, for all your hard work and contributions as we near our June 30th deadline this week.

Updates

1. Salesforce Opportunities/Leads Training took place last Thursday for all recruitment staff. Recording available  [here](#).
 2. Radius Events: all Parent Events and their Instances were created on Friday in Salesforce (this includes all events in Radius through end of July*) Thank you Cristina, Carlos A., Diana, Maria, Vincent, Andre, Trey and Bhavya for the extra support on Friday to get this done.
- *Some programs had events in Radius through December. Only those programs with events beyond July were also created.*

Action Items – Effective Immediately

- All staff should cease using the former Prospect Intake Form (refer to enclosed screenshot). The url to this form has been taken offline to prevent new cases from being created in Radius. All new cases/Opportunities are to be routed to Salesforce through the Chapman – General Inquiry Form.



PLEASE FILL OUT AND SUBMIT THIS FORM.

*First Name	<input type="text" value="First Name"/>
*Last Name	<input type="text" value="Last Name"/>
*Email address	<input type="text" value="Email"/>
Phone number	<input type="text" value="Phone"/>
Postal Code	<input type="text" value="Zip Code"/>
*Select Program of Interest	<input type="text" value="Program of Interest"/>
*International Prospect?	<input type="text" value="Please select International Prospect type"/>

- All staff should now utilize the [Chapman – General Inquiry Form](#) to create new Prospect Opportunities/Cases directly into Salesforce.
- Event managers should log into Radius and download their registrants/RSVPs for all current events before Friday (current events are those which have RSVPs in Radius, but Event State Date is beyond 6/30). Event managers will need to manually communicate with event registrants in the interim, while the data is still being migrated from Radius into SF.
- Graduate Prospect Opportunities (formerly known as “Cases”) have been mapped and should now accurately reflect Open or Closed status in Salesforce. Please ensure any and all Open cases for your respective programs are responded to (include cases dating back to 3 months). Open cases dating beyond 3 months, should be Closed. Both of these must be completed by this Friday.

Remember, you can refer to our resource site, [Blog – FIU College of Business CRM](#), for training documents and resources created to help with your Salesforce transition.

Best regards,
Angel

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