Education Data Architecture (EDA) Documentation

@salesforcedocs

Last updated: January 10, 2024

Contents

Education Data Architecture Documentation

Education Data Architecture (EDA) is a community-driven data architecture designed to help educational institutions use Salesforce.

Get Started with EDA

Learn about EDA, including EDA limitations and extension options, the EDA entity relationship diagram, and EDA objects and fields.

What's Education Data Architecture (EDA)?

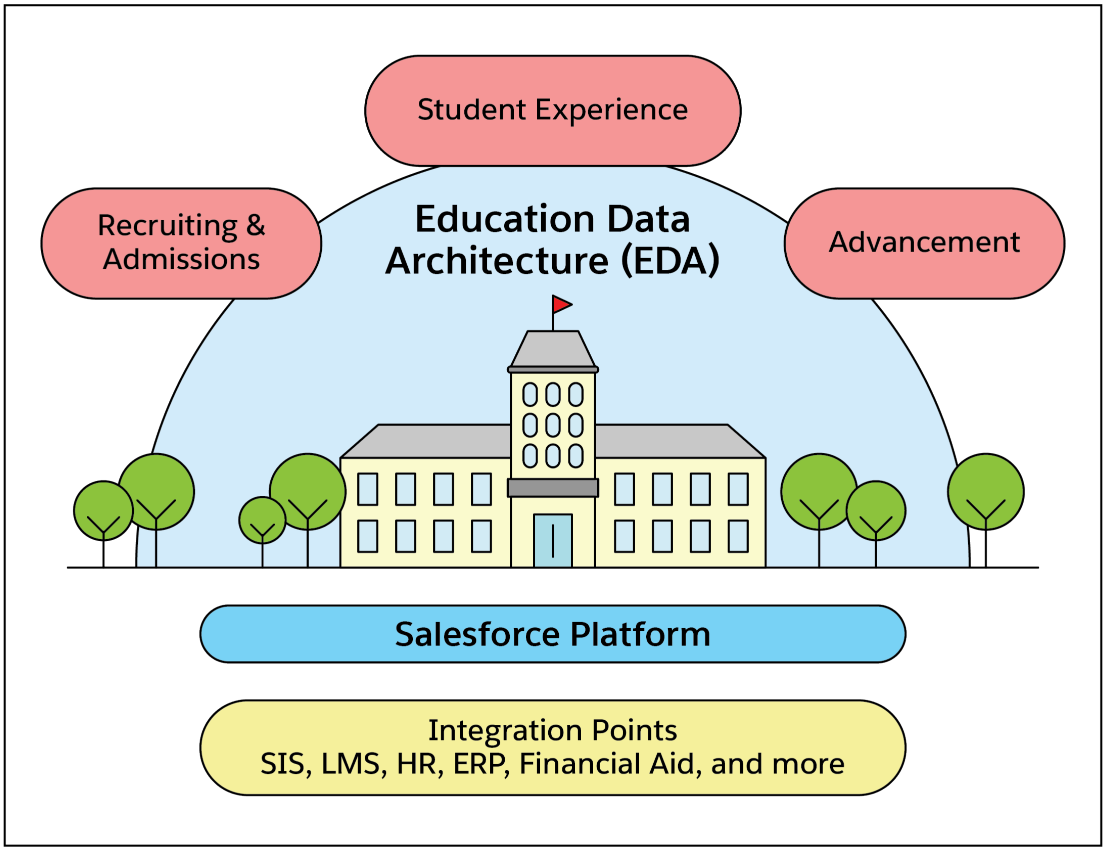
Education Data Architecture is a community-driven data architecture designed to help educational institutions use Salesforce out-of-the-box.

EDA standardises the starting point for educational institutions building out a CRM. It provides a **core and common** data model that supports the entire K-20 student journey. It's an open source architecture–anyone can view the source code in GitHub. It's been developed in close collaboration with our customers, partners, and the K-20 community to foster **common acceptance**. Solutions built on EDA share the same **open and flexible**, extendable framework that accommodates a range of use cases and end-user customisation. With EDA, you get an architecture along with preconfigured objects, logic and functionality, and automation, tailored for education right out of the box.

The EDA framework, supported by the Salesforce Platform, can serve as the foundation for managing data and data relationships across your entire institution, in departments like these:

- Advising
- Alumni and Advancement
- Business Enablement (Housing, IT Help Desk, Facilities, Security)
- Faculty
- Finance
- Marketing
- Recruiting and Admissions

- Registrar



EDA can give your student-facing staff a consolidated, 360-degree view of who students are, where they come from, what their interests are, and who they interact with. Build out your architecture to easily see students':

- Relationships with other people, such as parents, advisors, or teammates
- Organisations they're related to, such as schools, academic departments, or sports organisations
- Courses and degree programmes
- Address information, including seasonal addresses
- And much more . . .

You might adopt EDA on its own or as part of other Salesforce.org offerings. For example, Student Success Hub is built on EDA and enables a personalised, streamlined student experience with advising and other student services. Gift Entry Manager, also built on EDA, facilitates fundraising in advancement offices by tracking gifts, payments, and accounting data.

EDA is customisable for the many varied use cases we find in education. And, because it's built on the Salesforce Platform, your users can easily access the EDA app from mobile devices.

To be clear, EDA is neither a point solution nor a product in the traditional sense. It doesn't include functionality that's transactional or financial in nature, and it likely can't replace your LMS (Learning Management System) or SIS (Student Information System). Instead, it integrates with and complements those systems, providing a single place to track constituent information for that invaluable 360-degree view. Connecting all these data points around a student enables deeper, more meaningful engagement at every stage of the student journey.

For details about extending EDA with other solutions, see EDA Limitations and Extension Options.

As you get started, remember that you're not alone–institutions are ready to share EDA best practices and support. Join the Education Data Architecture Group today and join the conversation!

EDA Limitations and Extension Options

Keep in mind these limitations and extension options with Education Data Architecture.

EDA Limitations

Understand the access, usage, and compatibility limitations in Education Data Architecture.

Supported Browsers

Supported browsers for EDA are the same as those documented at Supported Browsers in Salesforce Help.

Salesforce Platform Limits Apply

EDA is subject to Salesforce limits on Platform usage. Among other limits, we limit how much data can be stored in a single org and the aggregate amount of CPU usage. For details, see Salesforce Developer Limits and Allocations Quick Reference. In particular, EDA is subject to managed package limits, such as the number of SOQL queries per transaction. For details, see Per-Transaction Certified Managed Package Limits.

If you're new to working with managed and unmanaged packages, we recommend the overview at Understanding Packages in Salesforce Help.

Person Accounts Are Not Supported

Person Accounts are not supported. However, it's okay if you install EDA in an org that has Person Accounts enabled.

Non-profit Success Pack Is Not Supported

We know many of you are devoted NPSP users. For now, we don't recommend installing NPSP and EDA in the same org.

Geographic Restrictions on Application Access

To comply with U.S. export law and regulations, users in certain geographic regions are restricted from accessing Salesforce products. For details, see Export Compliance terms in the Main Service Agreement.

EDA Extension Options

The EDA framework is not typically implemented standalone as an SIS, course catalogue, or system of record because of educational institutions' unique requirements for handling, processing, and retaining student, financial, and transactional data.

EDA is designed to integrate with and complement these other systems. It surfaces key information from your SIS and other systems to create a 360-degree view of constituents campus-wide, and enable deeper, more meaningful engagement.

EDA builds on Salesforce Platform functionality. You can extend the architecture with your own customisations, enable integrations with Salesforce APIs, and enhance its functionality with other products from Salesforce.org and partners in the Salesforce ecosystem–system integrators and ISV solutions on the AppExchange.

Here are some of the ways you can extend EDA to create a complete solution that supports learner and institutional success.

Recruiting and Admissions–While EDA can represent the Relationship and Affiliation data associated with prospects and applicants, and the data associated with Applications and Test Scores, it doesn't offer business logic for managing the recruiting and admissions process. Use Admissions Connect for application review management and Salesforce Marketing Cloud for recruiting campaign management. Also look on AppExchange for industry-specific products.

Course Catalogue–You typically set up an integration for course catalogue data.

Onboarding, Advising, and Degree Planning–For managing your onboarding programs, appointment scheduling, advising, degree planning, and more, you can use Advisor Link–along with its Pathways feature–to offer a personalised, streamlined student experience for these key student services. Advisor Link delivers advisee services through Experience Cloud functionality. You can explore using an Experience Cloud site with EDA to create an advisee portal experience.

Registrar, Enrolment, and Financial Aid–EDA provides a well-structured framework for tracking program plans, plan requirements, and courses, but minimal functionality for supporting a Registrar's administrative functions. It doesn't provide functionality for financial aid processing or management.

Learning Management System–The details of lesson delivery, discussion boards, and assessment activities are best handled by an LMS application, not a CRM. However, if your organisation has lightweight learning management needs, consider myTrailhead from Salesforce for simple guided learning journeys.

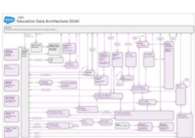
Enterprise Document Management–In Enterprise Edition orgs, Salesforce Files offers some file management and sharing functionality. Otherwise, enterprise document management is not included.

Student Groups, Athletics, and Event Management–Student involvement with campus activities can be tracked using Affiliations (affiliated Accounts), which relate Contacts to organised groups. In fact, we offer a preconfigured Account record type called Sports Organisation. However, managing group activities, ticketing or event communications, or athletic programs is not included.

Housing and Facilities Management–The EDA data model offers a basic framework of the Account, Facility, and Affiliation objects. Customisation is required to make it suitable for managing housing applications, residential life programs, or operations of an institution's physical plant and grounds.

EDA Entity Relationship Diagram

This diagram shows the relationship between EDA custom objects and Salesforce standard objects.



EDA Entity Relationship Diagram (in PDF format)

> **Note**
> Any unreleased services or features referenced in this or other presentations, press releases, or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based upon features that are currently available.

Education Data Architecture Objects and Fields

This document provides descriptions of Education Data Architecture objects and fields.

View EDA Objects and Fields, your source for all current field and object descriptions (best viewed in the Quip app, Google Chrome browser, or Mozilla Firefox browser).

Note

To evaluate the field and object descriptions we updated in Summer '20 to see if you'd like to adopt them in your existing org, check out the EDA Field and Object Description Change Log.

Get Started with Education Data Architecture Workbook

Use this hands-on workbook to plan and implement EDA.

Learn how your institution can get started with Education Data Architecture (EDA) in this hands-on workbook. Understand EDA objects, when to use each, how to approach your implementation, and next steps for success.

Get started with the Education Data Architecture Workbook today.

Getting Started: Salesforce Fundamentals for Education

Get acquainted with Salesforce terminology, your product(s), and the basics of using Salesforce for Higher Education.

Get Started: Salesforce Fundamentals for Education

There are so many ways to learn about SalesforceSalesforce. How you approach it depends on your learning style and preferences. Want to watch a live webinar and ask questions to SalesforceSalesforce experts? Check out our webinar series. Want to learn online on your own time? Try Trailhead. Want to read through detailed documentation, get one-on-one assistance, or talk to your peers? We've got you covered on all fronts!

We have an amazing collection of resources below designed to help you get started & be successful with Salesforce. So keep on reading...and have fun learning!

Webinars

Sign up for webinars to learn about Salesforce for Education.

Get Started Webinar Series for Higher Education

CRM stands for "Customer Relationship Management." CRM technology allows you to manage relationships with your constituents (including students, alumni, staff, parents, employers, and more) and track data related to all of your interactions with those constituents. It also helps teams collaborate, both internally and externally, gather insights from social media, track important metrics, and communicate via email, phone, social, and other channels.

A CRM like Salesforce allows an educational institution to have visibility into every aspect of its relationship with a student – from financial aid information to courses and grade data. And as opposed to this information being locked away in various systems scattered across campus --- it's all in one place. So at any point in time, staff and faculty have a holistic snapshot of a student's standing with the school and can use that information to engage in personalised and powerful ways.

CRM is not new to education. Many institutions have adopted departmental CRM solutions to aid in their recruiting and advancement efforts. However, many of these solutions are not integrated with one another and/or with other institution-wide systems, making it more difficult to track and report on the institution's efforts. Increasingly, institutions are moving toward a centralised CRM solution to fulfil the diverse needs of a complex academic community.

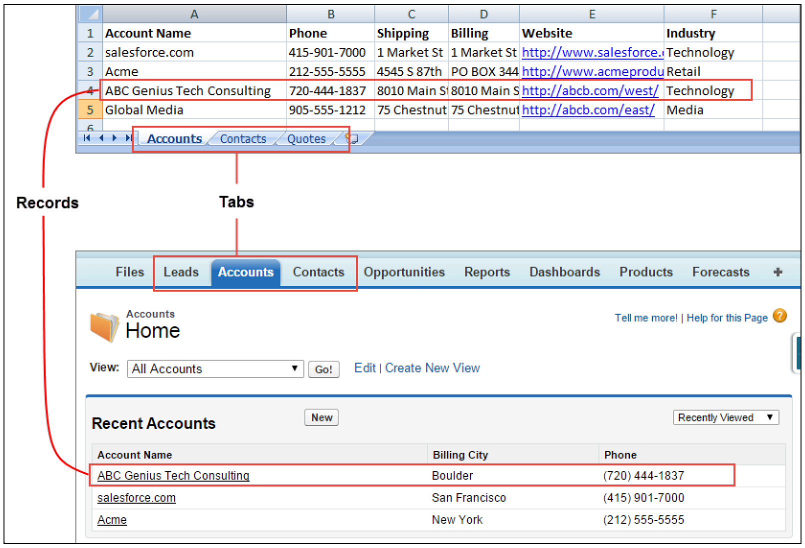
Check out this video: Power the Future-Ready Institution

Salesforce is a single place to create, view and update your constituent data from anywhere on any device to drive lasting engagement with your customers. You don't have to install software to access Salesforce. You just need an internet connection and a web browser (or mobile App).

Of course, building a CRM system isn't just about choosing the right technology, but also having the right business plan in place for a successful implementation. Check out The Ultimate Guide to Campus-Wide CRM and the Planning for Success Webinar for more information.

How Salesforce Organises your Data

Salesforce organises your data into objects and records. Think of an object as a tab on a spreadsheet and a record like a single row of data.



Salesforce comes with standard objects already set up and ready for use. Salesforce was originally designed as a "Business-to-Business" (B2B) application to help companies improve their sales processes and maximise their sales. In the traditional B2B scenario, every company keeps track of their accounts (the other companies they are selling to). Each account has people associated with it (contacts), as well as other things like "deals" (opportunities), cases, tasks, and the like. How all these things relate to and interact with each other in Salesforce is known as an account model. With Salesforce, the account model is flexible and in the education world, of course, we keep track of things a bit differently.

Translating the Salesforce Standard Objects

Learn how Salesforce standard objects support your institution's data model.

Leads

"Prospects" | The Leads object can be used to store data about any individual who might have an interest in your institution, but who have not yet become engaged (in whatever way you define): student prospects, donor prospects, vendor prospects, etc.

Contacts

"Individuals" | The Contacts object can be used to store information about any individual who interacts with your university including students, alumni, parents, staff, athletic ticket holders, and other constituents.

Accounts

In education, accounts can act as a container account for a single student and all their interactions with your school or they can be used to relate groups of Contacts from companies, departments, athletic teams or other institutions. In Salesforce, every contact must be connected to an account.

Opportunities

"Transactions" | The Opportunity object can be used to manage financial transactions between contacts and accounts and your organisation. This could include tuition or other payments, donations, grants, ticket and merchandise sales and lots more.

Campaigns

"Calls-to-Action" | The Campaigns object can be used to track any tactic where you are asking a contact for a response. Some common examples might include student recruitment events, fundraising campaigns, class enrolments, etc.

Education Data Architecture

Education Data Architecture (EDA) is an "App" that sits on top of your Enterprise Edition and provides the basic foundation for a Connected Campus. Built in collaboration with Salesforce.org partners and customers, EDA provides out-of-the-box functionality to organise your data in Salesforce. It helps institutions of all sizes connect with students, alumni, parents, and faculty in all kinds of ways. EDA uses standard Salesforce objects such as accounts and contacts and custom objects such as relationships and affiliations to track all kinds of connections. These tracked and organised connections make it simple to find the information you need in Salesforce.

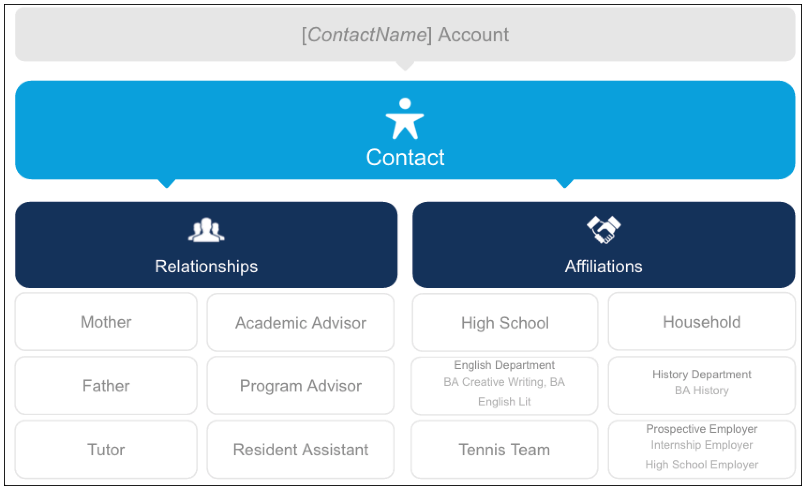
EDA functionality is adapted even further to meet the needs of K-12 constituents with the K-12 Architecture Kit. Developed specifically to connect schools and districts to people, processes and data, the K-12 kit helps manage students holistically and collaboratively. Through school-specific page layouts and additional custom objects such as Attendance, Behaviour Involvement, and Behaviour Response, the K-12 Architecture Kit is designed to enhance student success and family engagement.

Learn more about Education Data Architecture (EDA) and read up on the K-12 Architecture Kit .

EDA Account Model

In the Education Data Architecture (EDA) Account model, the standard Salesforce Account object acts as a kind of container account – referred to as the “Administrative Account” – with a single contact (often a student) associated with it. The relationship between the Account and Contact is 1-to-1. That is, for each contact you create in EDA, you also have a unique Administrative Account. As part of the EDA Account Model, EDA offers two important custom objects that work in conjunction with your contacts: Relationships, which help you track relationships between contacts Affiliations, which help you track affiliations between contacts and other accounts.

Learn more about Education Data Architecture (EDA).



Understanding Salesforce Editions and Products

A Salesforce edition is a selected set of features and functionalities that also specifies the amount of customisation possible, as well as the data and file storage capacity, and the API access available.

With the Power of Us licence donation program, Salesforce.org customers receive 10 Sales Cloud Lightning and Service Cloud Lightning Enterprise Edition licences at no cost. A licence is attached to a single user, so with 10 licences, you could have 10 users logged on to your Salesforce org at one time. If you need additional licences or products, you can purchase them at a deep discount from Salesforce.org. In addition to your 10 EE licences, you may have also chosen an App that will help you manage the student lifecycle. On the Salesforce.org website, you can choose between three trials - the standard Enterprise Edition, the Nonprofit Starter Pack or the Education Data Architecture (EDA). Knowing what edition and what app you are using will be vital information for you to know as you review Salesforce documentation, log a tech support ticket, or ask for help from the community.

Get Oriented in Salesforce

Check out the resources to familiarise yourself with Salesforce for Education navigation.

Navigating Salesforce

Access the Trailhead module to learn about Salesforce basics.

See Salesforce User Basics.

Trailhead: Free, Interactive Learning Paths for Salesforce

Trailhead is a free, interactive learning path through the basic building blocks of the Salesforce Platform. Test your knowledge of the platform while earning points and badges to celebrate your achievements.

Start with the CRM Essentials trail.

Your Support Team

Every Salesforce Foundation customer has access to a Sales Cloud Standard Success Plan which includes basic training to get you started. You also get access to community-based best practices and web-based support to help solve technical issues. If you are interested in enhanced support, resources, and training to drive adoption, then you may purchase a Premier Success plan which is available at a deep discount to Salesforce.org customers. If you are interested in pricing for Premier Success, please reach out to us via the Contact Me form.

See Sales Cloud Standard Success Plan and Contact Me.

Quicklinks

Check out resources available to you to help you get started with Customer Relationship Management (CRM).

What is CRM

Learn about Customer Relationship Management (CRM) and cloud computing.

- Trailhead Trail: CRM Essentials
- What is Cloud Computing?

Understand Your Product

Check out resources to learn about Salesforce products for education.

- Salesforce Edition Comparison
- EDA Documentation

Get Oriented

Check out the available resources to familiarise yourself with Salesforce for Education navigation.

- Getting Started: Navigating Salesforce
- Trailhead Trail: Salesforce User Basics

Get Help

Check out the available resources to get help from peers or Salesforce experts.

Community

Access community resources to connect with other Salesforce for Education enthusiasts and learn from their experiences.

- Log into the Trailblazer Community
- Sector: Higher Ed Chatter Group
- EDA Chatter Group

Salesforce

Learn about the Sales Cloud Standard Success Plan for your educational institution, technical support access, and training options.

- Your Sales Cloud Standard Success Plan
- How to log a Tech Support Ticket
- Training Options

Consulting Partners

Find a partner to help you implement Salesforce for your educational institution.

- Find a Partner
- Contact

Get Oriented to the EDA Data Model

Understand the typical EDA data model for your institution.

Welcome to Your EDA Data Model Orientation

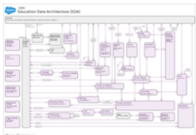
Start your Education Data Architecture (EDA) implementation with a solid understanding of the Salesforce data model for primary, secondary, and higher education.

Welcome to Your EDA Data Model Orientation

Salesforce admins commonly refer to the data model as an account model or an object model. In a traditional Salesforce CRM context, the Account object is central because it represents the business customers, or sales accounts, that a business sells to or aspires to sell to. In the EDA data model, the Account object remains alive and well. But it takes a back seat to the Contact object because we're building a CRM for education that's mainly focused on students–their personal and academic connections, the classes they're taking, and the teams and clubs they belong to.

> **Tip**
>
> If you're newer to Salesforce, and terms such as object, field, or record aren't yet familiar concepts, we recommend that you start by reviewing the Data Modelling module in Trailhead. It covers the basics of translating your data to fit within a relational database model. A little background goes a long way in setting you up for success with data modelling in EDA.

A discussion of the EDA data model is incomplete, and downright difficult, if it doesn't involve the entity relationship diagram (ERD), our visual version of the data model.



Even with the ERD, it can be a bit daunting to know where to begin! Rest assured, while it's important to eventually understand the whole of the data model, we're going to get oriented to discrete parts, or clusters of objects, in turn. Institutions typically plan their EDA implementations part by part, deciding which kinds of data they want to track–attendance, programs, enrolments, or other specific data use cases. Consider the common use cases in this orientation to help you plan a strategy for the unique scope, shape, and size of your school's data.

EDA out of the box gives you a great head start, with customisations to standard Salesforce objects such as Account, Contact, and Case, and two dozen or so EDA custom objects that make up the bulk of the data architecture. The flexibility of EDA's Salesforce Platform base means you can further customise objects, fields, layouts, and more. After you know what you can do with individual objects and clusters of objects, you can decide which parts of EDA to build out that align with your implementation goals. As for the parts that you don't need right now, ignore them or hide them from your users.

For details about specific use cases, objects, and fields, we recommend keeping these resources close at hand.

- Get Started with Education Data Architecture Workbook
- EDA Entity Relationship Diagram
- EDA Data Dictionary
- Object-by-object reference articles with configuration details, such as Account

Model Your Institutional Account Structure

Learn how to align the Account object in EDA to your institutional structure.

Model Your Institutional Account Structure

A four-year university, an elementary school, and a school district all have vastly different org charts and governance models. But no matter your educational context, the Account object is foundational for modelling your institutional structure.

Institutional and Organisational Accounts

The Account object is a standard Salesforce object that represents organisational entities, such as departments or the academic programs that they administer, campus organisations, and sports teams. Accounts also represent organisational entities external to an educational institution, such as the schools that students have graduated or transferred from, local businesses, vendors, and research partners.

To help distinguish different types of institutional and organisational Accounts, EDA comes preconfigured with these record types that can be used for internal or external entities.

- Educational Institution
- University Department
- Sports Organisation
- Business Organisation

> **Note**
> As you develop a plan for tracking institutional and organisational entities, consider whether you need custom Account record types to track other entities, such as school districts or government agencies.

A few other preconfigured Account record types are included.

- Administrative Account and Household Account—Specialised record types for modelling data about individual Contacts. See Model Faculty, Staff, and Student Contacts.
- Academic Program—A record type for modelling any type of academic, student support, or recreational program, including degree- or credential-granting programs. In the EDA data model, an Academic Program is modelled under a parent Account that typically represents some department within the institution.

Structure Account Records in a Hierarchy

Use Account records to model your institution's entities, including an Account record for the institution itself. You want your institutional Accounts to be well-defined and well-structured before you create Contact records to model the faculty, staff, students, and other people who have relationships with these entities.

Here's a small sample of Connected University's institutional Account records.

Account records

Account Name	Parent Account	Account Record Type
Connected University	None	Educational Institution

Account Name	Parent Account	Account Record Type
Administration	Connected University	University Department
Office of the President	Administration	University Department
Finance and Administration	Office of the President	University Department

Organise your institutional Account records in a tree structure of parent and child records–what's known in Salesforce as an ***account hierarchy***. For Accounts outside your institution, organise them into their own, separate account hierarchies, as needed.

Institutional Accounts: Sample Account Hierarchies

Let's see how account hierarchies can look in different educational contexts.

Important

Keep in mind that these sample hierarchies don't necessarily mirror an org chart or personnel chart, nor are they supposed to. It's best to design your account hierarchies based on data management within the Salesforce security and record sharing model. Structure the data so that users have permissions to access only the data that they need and not more.

Let's take a closer look at part of the account hierarchy for Connected University. The top-level parent Account represents the university itself. Accounts underneath represent administrative departments, academic divisions, and so on. Notice that Accounts lower in the hierarchy are sometimes parent Accounts, too.

- Connected University
  - Administration
    - Office of the President
      - Finance and Administration
      - IT and Data Services
  - Office of Admissions and Records
    - Registrar
  - Office of Student Affairs
    - Academic Senate
  - Office of Real Estate and Facilities
    - Physical Plant Department
  - Schools and Colleges
    - Office of the Provost
    - College of Arts and Humanities
      - Undergraduate Study
      - Graduate Study
    - School of Law

Consider another example of part of an account hierarchy for a secondary school that's a feeder school for Connected University. Under the top-level Daisy Bates Academy parent Account are Accounts representing administrative departments, academic departments, and so on.

- Daisy Bates Academy
  - Leadership Team
  - Curriculum and Instruction
    - Languages
    - Science
    - Performing Arts
  - Extracurricular Programs
    - The Bates Journal
    - Robotics Club
  - Student Support Services
    - Academic Counselling
    - Special Education
    - Tutoring
  - Facilities and Maintenance
    - Cafeteria Services
    - Custodial and Maintenance Services
    - Tech and Media

Let's round out our examples with part of an account hierarchy for the school district that Daisy Bates Academy is in. Under the top-level Rosewood Unified School District parent Account there are Accounts representing the superintendent's office, district services, district schools, and so on.

- Rosewood Unified School District
  - Board of Education
  - Superintendent's Office
    - Personnel
    - Learning and Development
    - Student Services
      - Special Enrichment Programs
    - Operations
    - Primary Education
      - Delano Elementary School
      - E.L. Kahlert Elementary School
    - Secondary Education
      - Rosewood Middle School
      - Daisy Bates Academy
      - Orange Tech High School

Model Your Physical Campus

Use the Facility object to model data about buildings, lab facilities, dormitories, sports facilities, and other property assets.

Model Your Physical Campus

Use the Facility object along with related objects to track data.

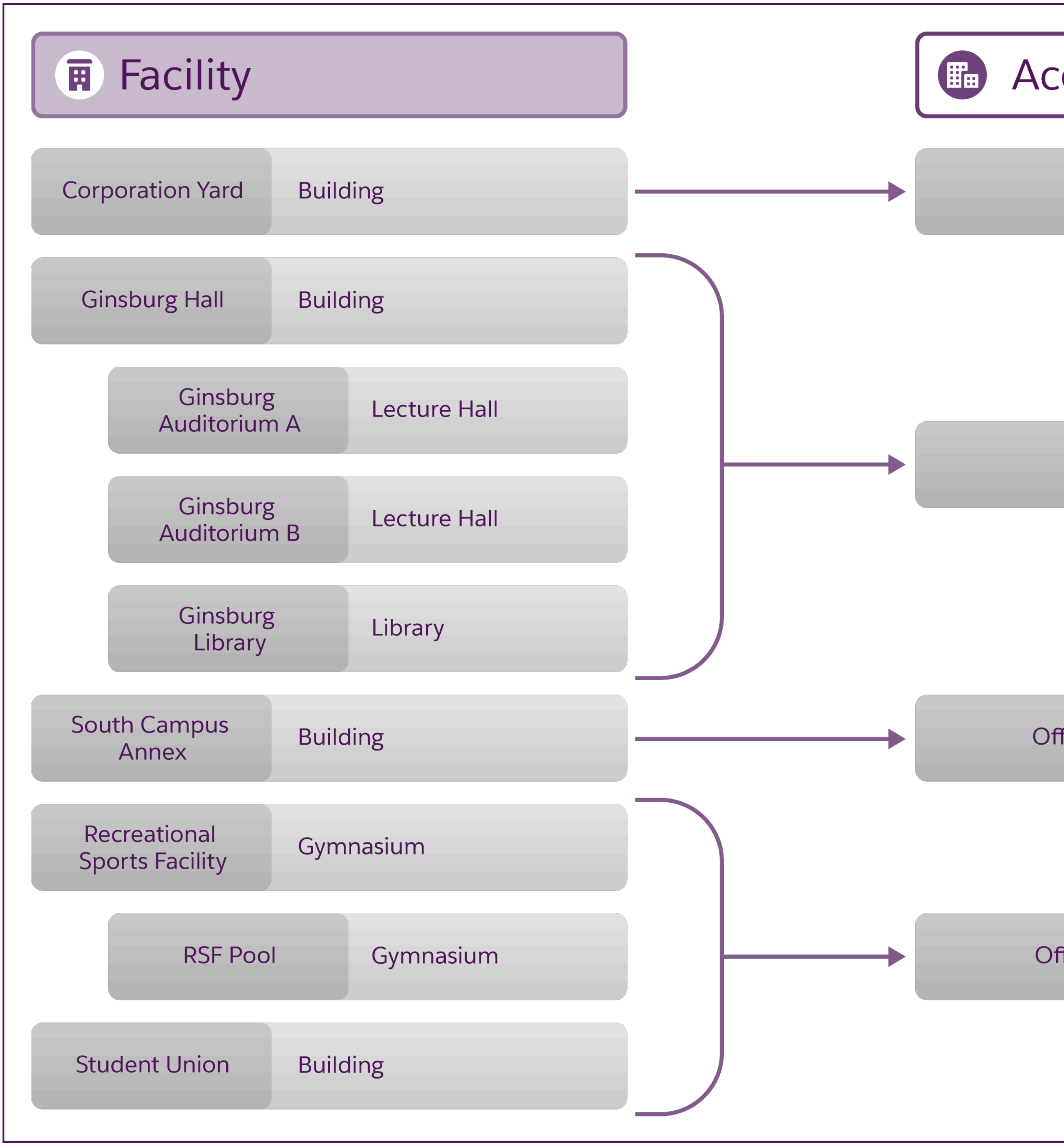
Example data that you can track:

- The property type and capacity.
- The building (parent Facility) that a classroom is located within.
- The department (Account) responsible for a Facility.
- The staff or faculty member (Contact) who's a Facility's primary contact.
- The student (Contact) who is assigned to a dorm room.
- A class location (Course Offering).
- A class location that varies by day of the week (Course Offering Schedule).

Consider this example of a partial list of Facility records for the Connected University campus.

Facility Name	Facility Type	Parent Facility	Account
Corporation Yard	Building	None	Physical Plant Department
Ginsburg Hall	Building	None	School of Law
Ginsburg Auditorium A	Lecture Hall	Ginsburg Hall	School of Law
Ginsburg Auditorium B	Lecture Hall	Ginsburg Hall	School of Law
Ginsburg Library	Library	Ginsburg Hall	School of Law
South Campus Annex	Building	None	Office of Research and Innovation
Recreational Sports Facility	Gymnasium	None	Office of Real Estate and Facilities
RSF Pool	Gymnasium	Recreational Sports Facility	Office of Real Estate and Facilities
Student Union	Building	None	Office of Real Estate and Facilities

Notice that Facility records can be organised in a hierarchy, so that you can define in detail how property assets are related, such as a Facility record under a parent Facility record. For example, the RSF Pool is part of the larger Recreational Sports Facility complex, which is administered by the Office of Real Estate and Facilities.



Model Faculty, Staff, and Student Contacts

Use the data stored in the Contact object and custom objects to understand your students, faculty, and staff.

Model Faculty, Staff, and Student Contacts

Faculty, staff, administrators, and students are modelled with the Contact object, which is a standard Salesforce object augmented with education-specific fields, such as Financial Aid Applicant and Primary Language. Custom objects in EDA store other Contact-related data, such as a person's connections on and off campus, notable attributes, the languages they speak, and so on.

When you've built out your data model and populated it with data, EDA can help you weave together biographic and demographic data from the Contact object with selected data from Contact-related objects. The result? A unified student record that helps you see, understand, and serve the whole person behind the data.

Contacts and Their Affiliations

The Affiliation object lets you model an affiliation between a Contact and an Account that the person has a meaningful connection with.

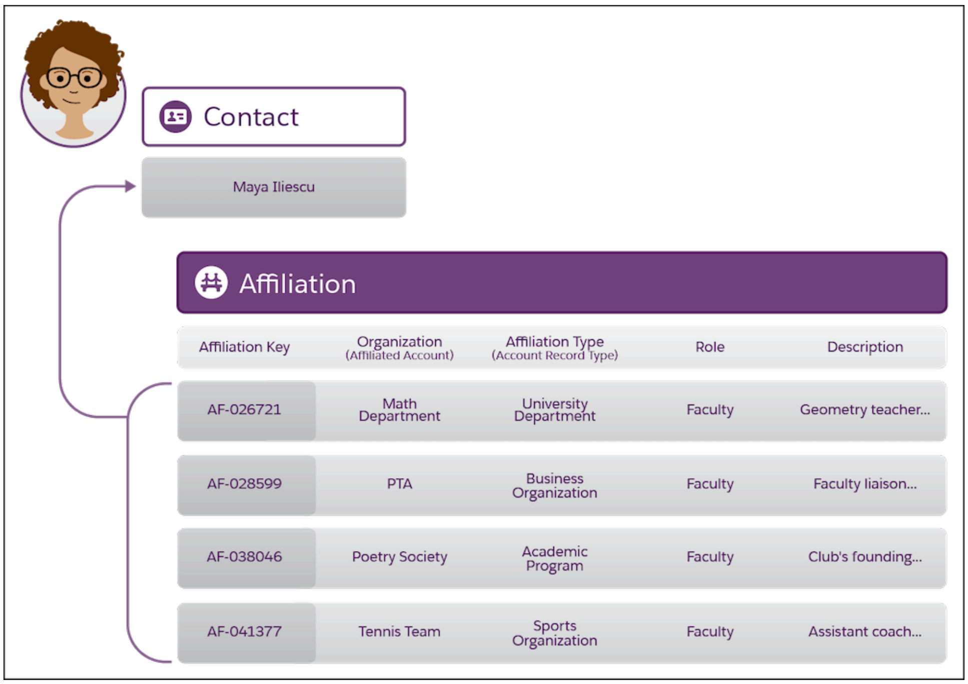
For a faculty or staff member, an Affiliation record often represents a professional affiliation with an administrative, academic, or operational department that you've already modelled as an Account record. Similarly, for a student, Affiliations represent academic, social, or professional connections with some of those same departments, as well as other on- and off-campus Accounts. We call Accounts that represent Affiliations ***affiliated Accounts***.

Consider the example of faculty member, Maya Iliescu, at Daisy Bates Academy. Maya has responsibilities in several areas, which are represented by these Affiliation records related to her Contact record.

Affiliation records

Affiliation Key	Organisation (Affiliated Account)	Affiliation Type (Account Record Type)	Role	Description
AF-026721	Maths Department	University Department	Faculty	Geometry teacher since 2014.

Affiliation Key	Organisation (Affiliated Account)	Affiliation Type (Account Record Type)	Role	Description
AF-028599	PTA	Business Organisation	Faculty	Faculty liaison on Curriculum Committee.
AF-038046	Poetry Society	Academic Program	Faculty	Club's founding sponsor.
AF-041377	Tennis Team	Sports Organisation	Faculty	Assistant coach (temporary sub).



Maya has ties to external organisations, too. She's on the board of a community nonprofit and a member of the National Council of Teachers of Mathematics. If you create Account records for these external entities, you can relate them to Maya's Contact record as affiliated Accounts, as well.

Contacts and Their Container Accounts

Now consider the example of a student, Stacey Bergen.

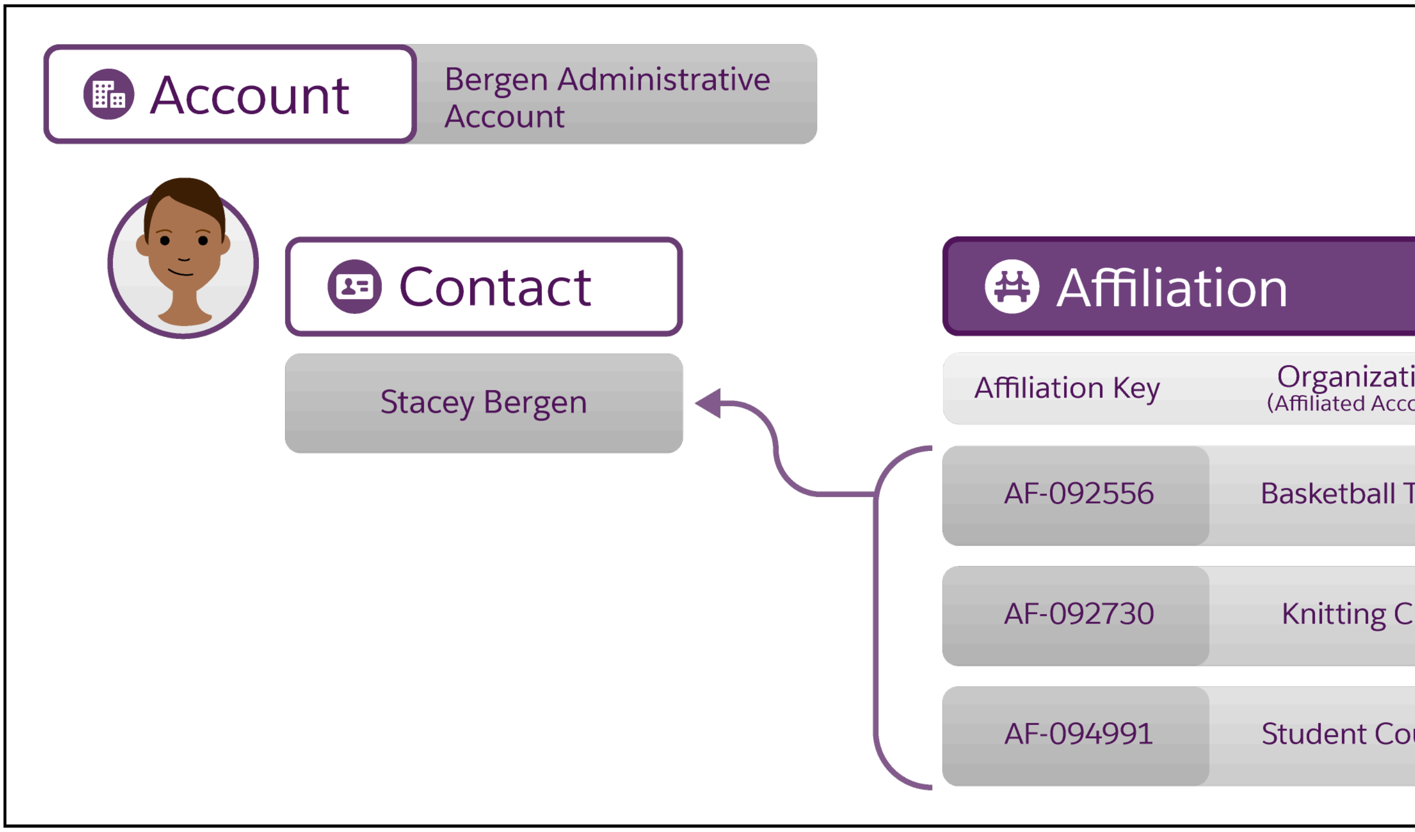
Similar to maths teacher Maya, Stacey's Contact record is related to several affiliated Accounts, including the Basketball Team, the Knitting Club, and Student Council. Stacey's Contact record is also associated with a ***container Account***, which is a specialised Account type distinct from an affiliated Account.

A container Account is required because the Salesforce data model requires certain data about Contacts to be stored at the higher level of the Account, for security and other technical reasons. A container Account serves as the ***parent*** record of its associated Contact record and is required, whereas an affiliated Account is ***related*** to the Contact record and optional. In other words, it's OK if Stacey's Contact doesn't have affiliated Accounts but Stacey's Contact must have a parent Account.

EDA offers two kinds of container Accounts, each one an Account record type.

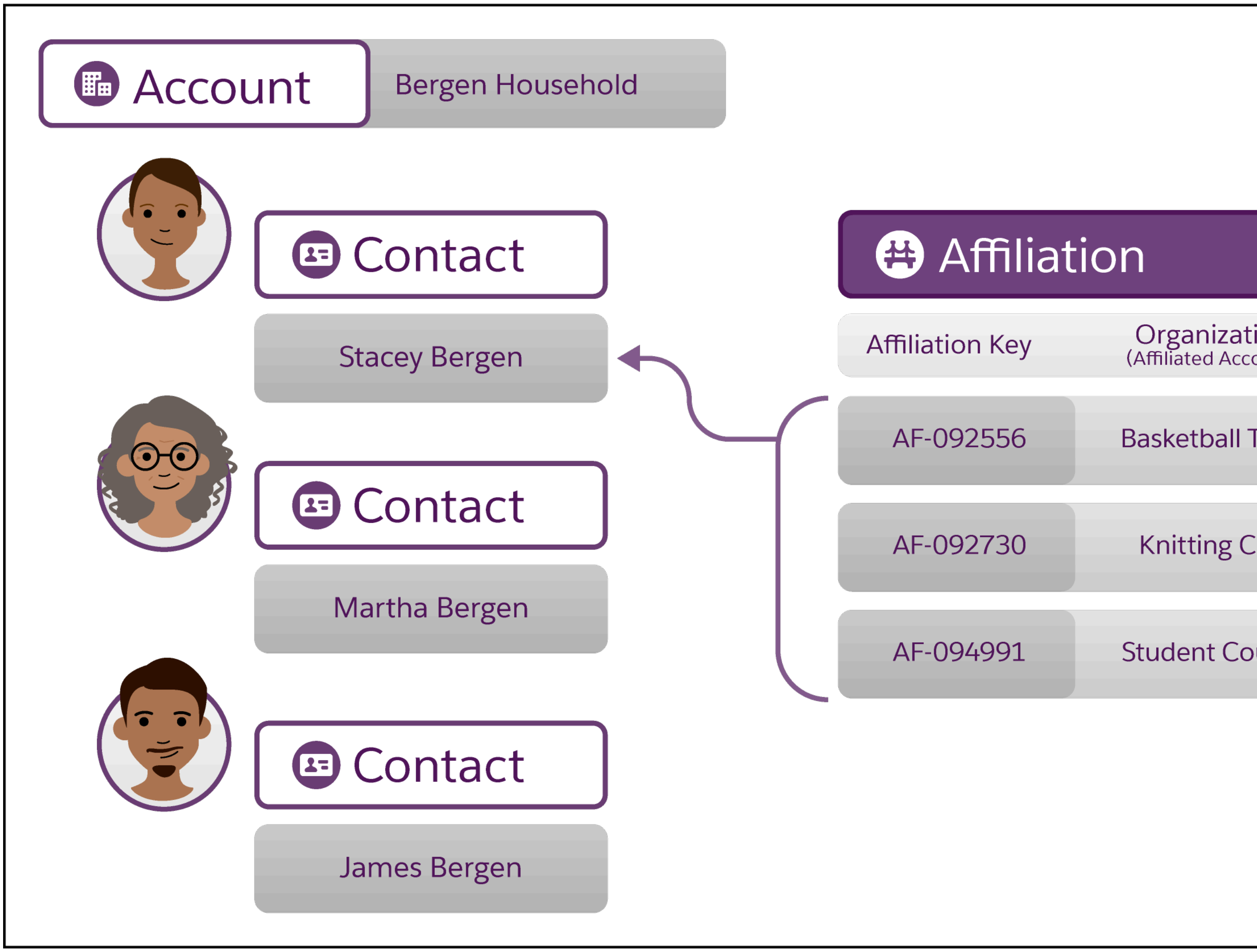
Administrative Account

You can think of an Administrative Account as the Account-level representation of a Contact. An Administrative Account is a parent to one and only one Contact. The Administrative Account record for our student Stacey could be named, for example, Bergen Administrative Account. This Account that ***contains*** Stacey's Contact record is different from Stacey's affiliated Accounts, which are all ***related to*** her Contact record.



Household Account

A Household Account functions just like its name suggests, to represent the household a Contact belongs to. Unlike the Administrative Account's one-to-one relationship, a Household Account is typically a parent to multiple Contacts besides the student, such as the Contact's parents or guardians, siblings, and other household members–they're all Contacts, too. Our student Stacey lives with her grandmother, Martha, and her father, James. Their Household Account record could be named, for example, Bergen Household. This Account that ***contains*** Stacey's Contact record is different from Stacey's affiliated Accounts, which are all ***related to*** her Contact record.



Common Approaches to Container Accounts

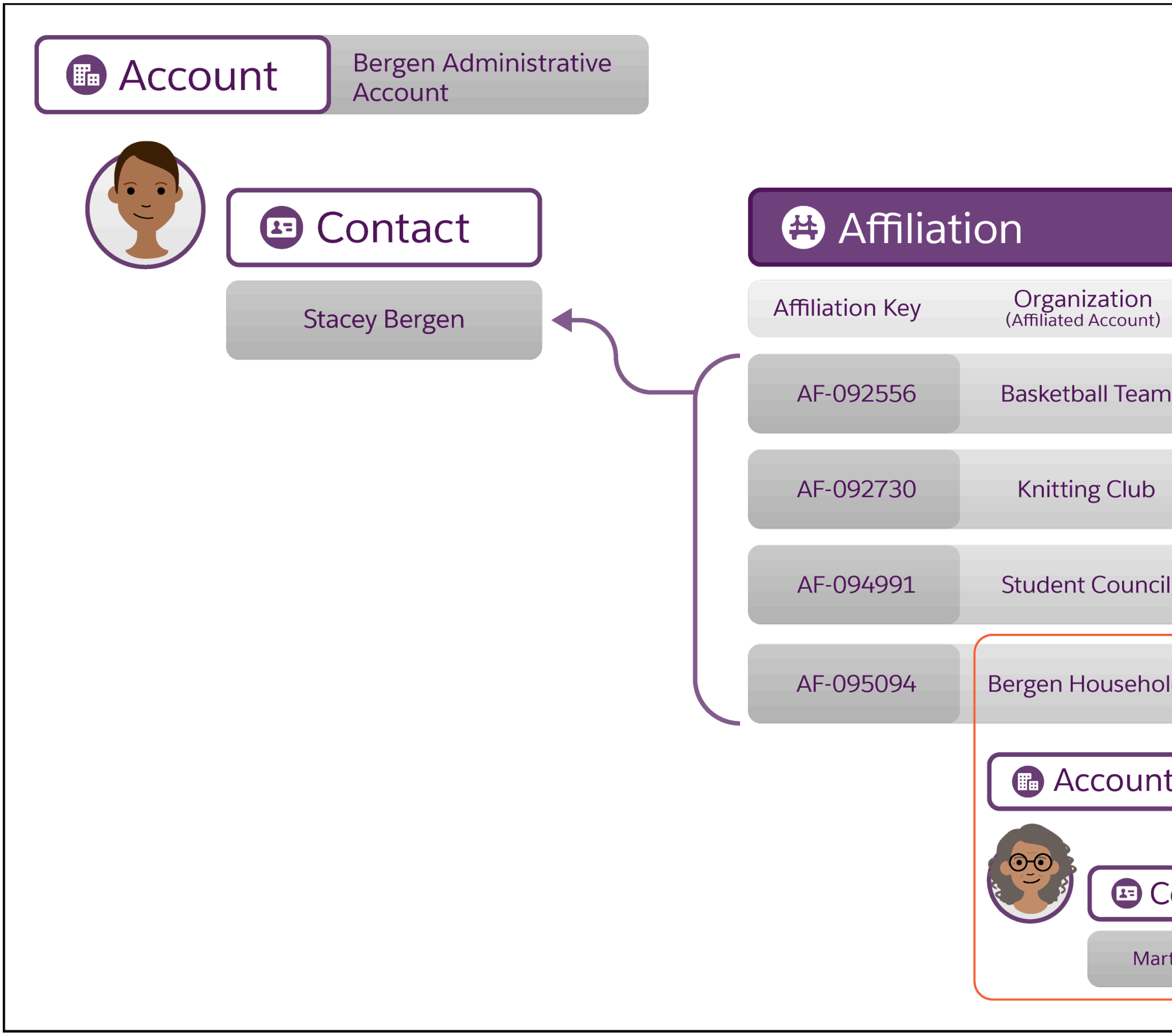
In primary and secondary education, Household Accounts are more common. Tracking data about a student's household can be as important as tracking data about students themselves, because family relationships are central to K-12 student success.

In higher education, Administrative Accounts are more common because while family data is still important, it's secondary to data about the student as an independent adult. After graduation, though, Household Accounts are sometimes preferred for modelling an alum as they take their next steps in life, which can include building a household of their own.

Institutions using Administrative container Accounts for student Contacts often ask how they can also model a student's membership in a household. A common solution is to:

- Create a Household Account record for the household. For example, `Bergen Household`.

- For other members of the household, such as parents or guardians, create their Contact records under the household, with the household as the parent Account for these Contacts.
- Create an Affiliation record that relates the student's Contact record to the household's Account record.



Choose a Default Account Model for Contacts

Decide whether Administrative or Household is the better container Account choice for modelling your student data, and set that type as the ***default account model***.

The default account model determines:

- The type of container Account created automatically for every new independent Contact–that is to say, a Contact who isn't under an existing container Account.
- The naming and renaming of container Accounts, which happens automatically when Contacts change their names or household memberships, based on the choice of Administrative or Household and your Account naming customisations.
- Your options for managing address data for Contacts and Accounts, which is stored in the Address object. Household Accounts offer more flexibility than Administrative Accounts to track multiple addresses for a single household and for different household members.

Although it's required that you choose Administrative or Household as your default account model, it's fine to have some Contacts with Administrative Accounts and others with Household Accounts within the same EDA org. It's also possible to change the type of container Account for a Contact, such as changing from Administrative to Household when a student graduates from college.

See Also:

Configure Account Model Settings

Customise Administrative and Household Account Names

Configure Address Settings

Considerations for Faculty and Staff Container Accounts

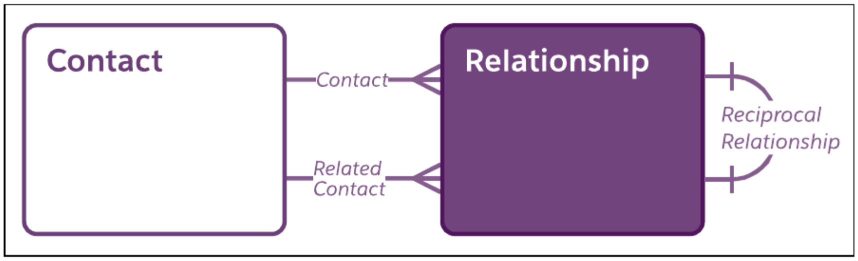
After choosing a preferred container Account type for students, decide whether it's also the right type for faculty and staff Contacts who work at your institution. While you're not required to use the same type of container Account for both types of Contacts, doing so simplifies data management because the Default Account Model setting takes care of creating the correct type of container Account for all faculty, staff, and student Contacts.

In some cases, though, a different container Account type can make sense for faculty and staff. Let's say that Household Accounts is the default account model for students, but you prefer Administrative Accounts for faculty and staff because it's a lighter-weight, less data-intensive account model. This approach is fine, as long as you design your business processes accordingly. A mix of Account types means that you must avoid automatically creating container Accounts for non-student Contacts–in our example, make sure to create their Administrative Accounts manually.

Whatever you decide, we recommend reviewing important details about data storage and security considerations in Configure Account Model Settings.

Contacts and Their Relationships

The Relationship object tracks how someone is connected to someone else. In other words, a Relationship record relates one Contact record to another. EDA offers a preconfigured set of Relationship values that mostly represent familial relationships–Parent, Grandparent, Guardian, and the like. While they're most relevant for tracking data about students' families and households, you can create custom Relationship values for all types of Contacts.

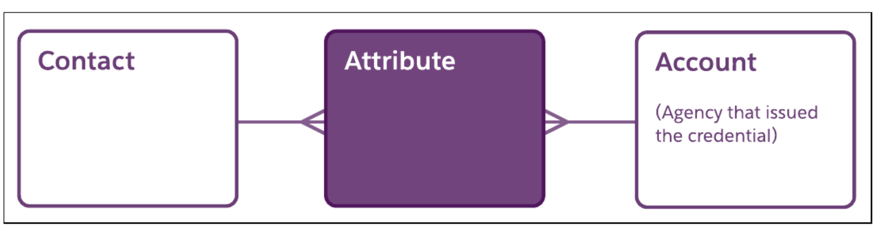


For Relationships specific to faculty and staff, decide whether it's useful to create custom Relationship values such as Mentor Teacher or Classroom Aide. If you do create any custom values, remember to create values for both sides of the Relationship. The EDA data model requires that every Relationship (such as Mentor Teacher) have a reciprocal Relationship (such as Mentee Teacher).

Contacts' Attributes and Credentials

The Attribute object lets you track students' significant attributes, and faculty and staff members' licences, certifications, and professional endorsements.

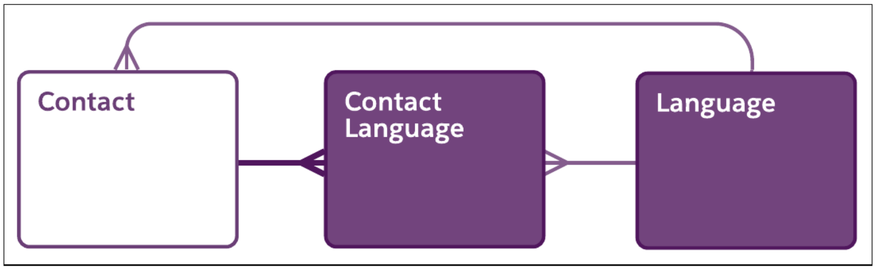
The preconfigured Student Characteristic record type is designed for tracking data such as students' family considerations, Individualised Education Program participation, and so on. The preconfigured Credential record type is designed for faculty and staff, and is especially useful for tracking requirements of certificated or professionally licensed staff.



Contacts' Language Proficiency

Track Contacts' fluency with languages using the Language and Contact Language objects.

The Language object contains records for the languages spoken by your campus population and the languages used for instruction. The Contact Language object tracks an individual Contact's fluency with a language, and can track whether it's the Contact's primary language.



Model Your Academic Calendar

Use the Term object to define and segment your institution's academic year.

Model Your Academic Calendar

Similar to how you create an account hierarchy to model your institutional structure, you create a hierarchy of Term records to model the academic year. A Term record represents some period of instruction, including the start and end dates. It can represent all or part of a school year, such as a semester or quarter, a specific quarter of a semester, a mini-term, and so on.

Here's an example of Term records for Daisy Bates Academy, which follows the semester system uniformly.

Term Name	Type	Parent Term	Grading Period Sequence	Account
2020-2021 School Year	School Year	None	None	Daisy Bates Academy
2020-2021 Fall	Semester	2020-2021 School Year	1	Daisy Bates Academy
2020-2021 Spring	Semester	2020-2021 School Year	2	Daisy Bates Academy
2020-2021 Summer	Semester	2020-2021 School Year	3	Daisy Bates Academy
2020-2021 Summer Session A	Part of Term	2020-2021 Summer Session	1	Daisy Bates Academy
2020-2021 Summer Session B	Part of Term	2020-2021 Summer Session	2	Daisy Bates Academy

A Grading Period Sequence field on the Term record lets you track when a Term occurs relative to other Terms that are under the same parent Term. In our example with summer session Terms A and B, you can use 1 and 2, respectively, to track their order.

Term

Term Name	Type	Grading Period Sequence
2020-2021 School Year	School Year	
2020-2021 Fall	Semester	1
2020-2021 Spring	Semester	2
2020-2021 Summer	Semester	3
2020-2021 Summer Session A	Part of Term	1
2020-2021 Summer Session B	Part of Term	2

Notice that a Term is always defined in relation to an Account—the entity that administers that chunk of the schedule, so to speak. If the entire institution follows the same instructional periods, it's simple: relate all Term records to the Account that represents the institution. If some departments follow different instructional periods, then things get more complicated.

But Terms are designed to be flexible, so complicated isn't a problem for the EDA data model.

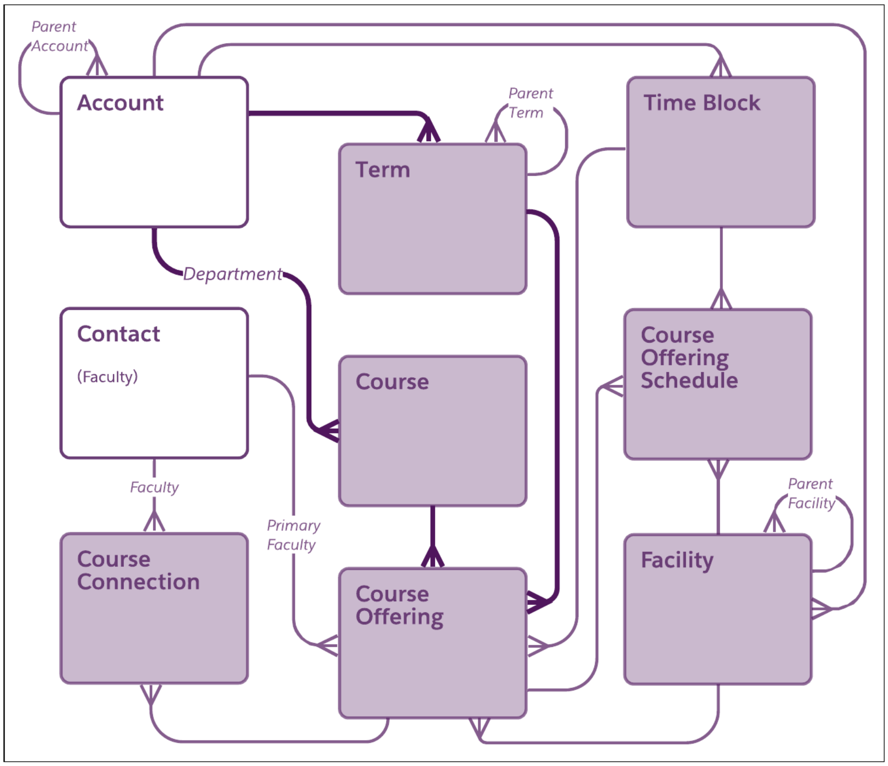
- At Connected University, the School of Law and the School of Business follow different schedules, so they design two separate hierarchies. All of the Term records in one set are related to the School of Law's Account record, and all of the ones in the other set are related to the School of Business' Account record.
- Connected University offers virtual programs in addition to in-person instruction. Virtual programs follow non-traditional intake cycles, accommodating enrolment every six to eight weeks. Term intervals can be as short as you need them to be.
- At Daisy Bates Academy, a special immersion program runs for an extended period and overlaps with the regular Term that non-immersion students follow. It's fine to have Terms with overlapping dates.

Model Courses and Curricula

Use multiple custom objects in EDA to model your institution's courses and curricula.

Model Courses and Curricula

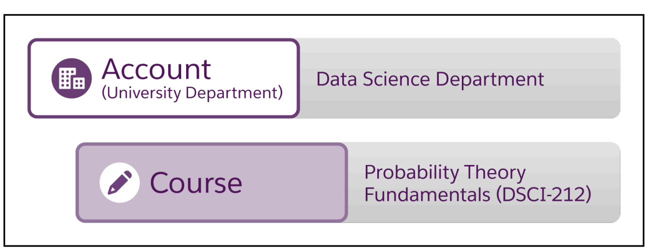
Modelling courses and curricula in EDA relies on a number of EDA custom objects: Course, Course Offering, Course Offering Schedule, Time Block, and Course Connection. Let's see how these objects relate to one another, and to the objects covered elsewhere in more detail–Term, Account, and Facility.



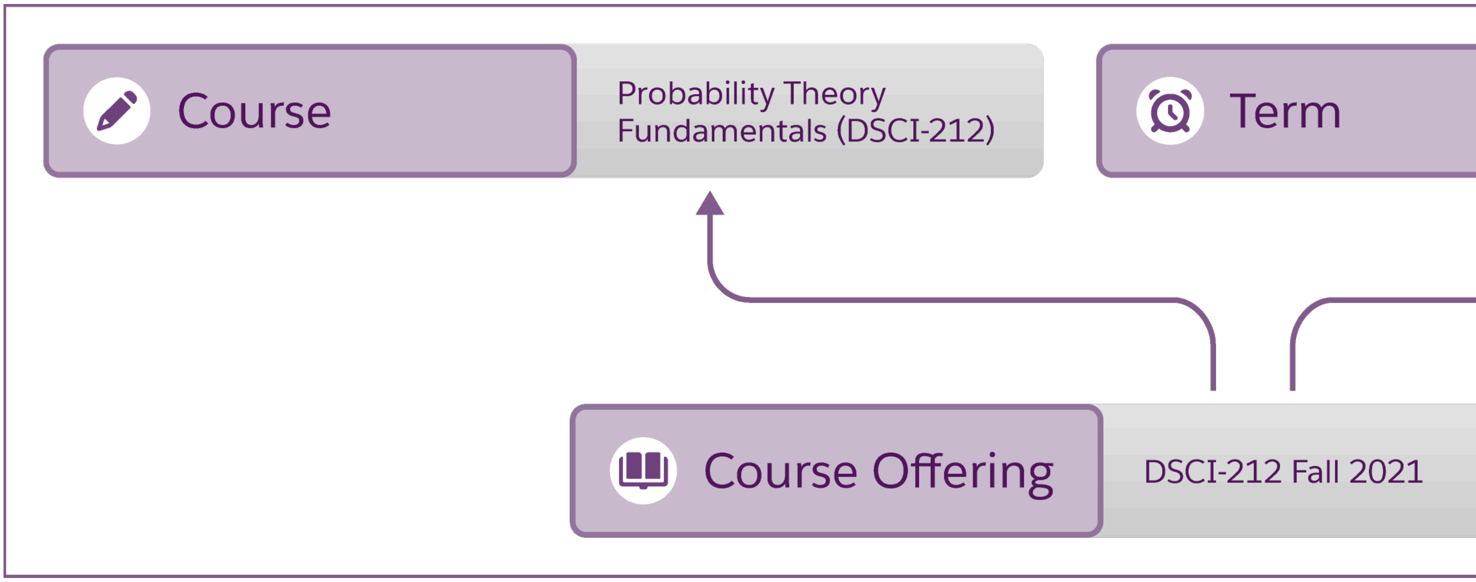
Courses and Course Offerings

A Course on its own is an abstract idea. It's a class–a syllabus of material typically worth a certain number of credit hours. It's always under the purview of a specific department, as a child record of a department's Account record.

For example, the Data Science Department offers Probability Theory Fundamentals nearly every semester as a four-unit course. In the course catalogue, it's Course ID DSCI-212.



A Course Offering makes a Course concrete in time and space. It relates a specific instance of a Course to a specific Term. In the Fall 2021 semester, students vie for one of the 120 coveted spots in Probability Theory Fundamentals, with the ever-popular Professor Hsu. The Course Offering record is specific about the Term, the faculty, start and end dates, capacity, and so on.

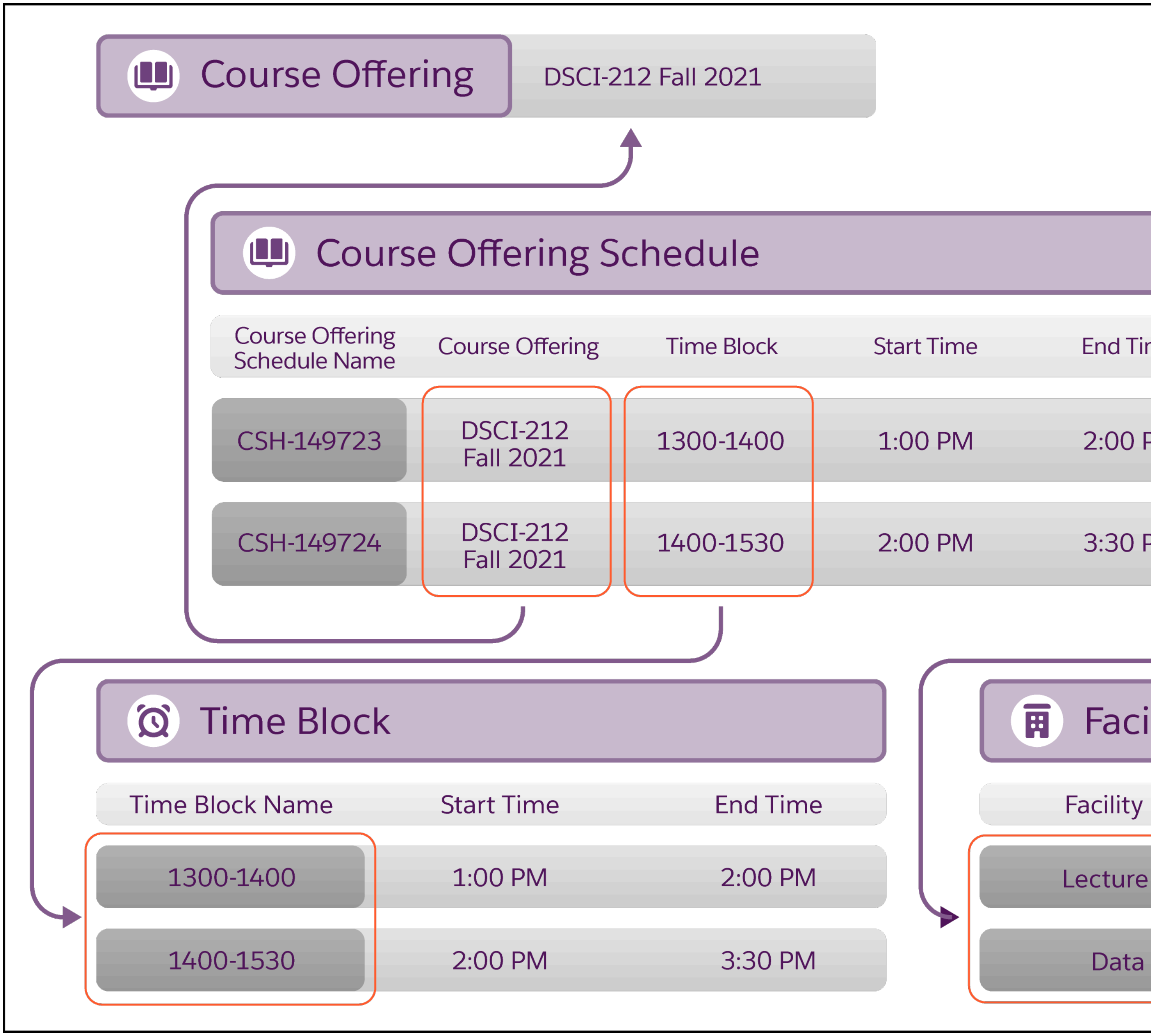


Course Offering Schedule Details

A student who's lucky enough to secure a seat in the fall semester Course Offering of Probability Theory Fundamentals needs to know when and where to show up for class. On Mondays, Wednesdays, and Fridays, class meets from 1-2 PM in Dixit Building, Lecture Hall A. On Tuesdays and Thursdays, it meets from 2-3:30 PM in the adjacent Data Lab.

Model these day-by-day schedule variations using the Course Offering Schedule, Time Block, and Facility objects. Think of these pairs of records storing the data for the Course Offering.

- One Course Offering Schedule record (CSH-149723) lets us account for the Monday, Wednesday, Friday occurrences. A second Course Offering Schedule record (CSH-149724) lets us account for the Tuesday, Thursday occurrences.
- One Time Block record (1300-1400) represents the 1-2 PM slot. Another (1400-1530) represents the 2-3:30 PM slot. Each time slot's start and end times are automatically copied to the start and end times of their respective Course Offering Schedule records, which helps keep this data accurate and in sync across records.
- One Facility record represents Lecture Hall A in Dixit Building. Another represents the Data Lab.



Note

In this example, Connected University uses the Course Offering Schedule object along with Course Offering and Time Block because the combination allows for more flexible modelling of Course Offerings with variable schedules. K-12 schools that follow alternating A/B schedules typically need a similar degree of flexibility.

If your institution's scheduling is less complicated, you're not required to use the Course Offering Schedule object at all. Instead, you can use the Time Block field on the Course Offering record, which tracks the same data as the Time Block field on the Course Offering Schedule record.

Cross-Listed Courses

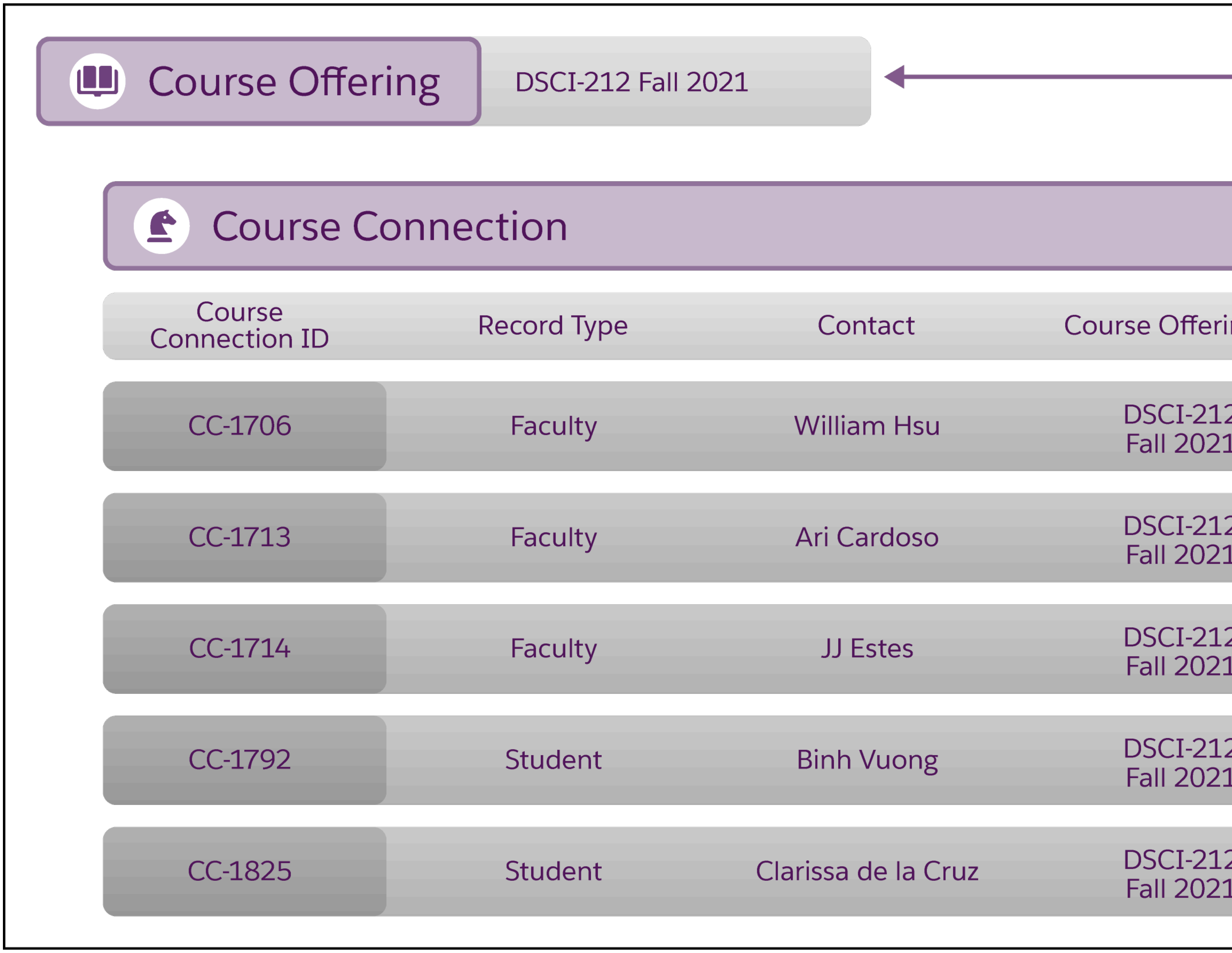
Every Course must have a single University Department Account as its parent. For a cross-listed Course, each collaborating department typically maintains its own Course record and its own Course Offering record, and makes sure that both Course Offerings share identical scheduling, credit hours, instructor, and other details.

If you want to indicate cross-listing in the Course Offering ID or Section ID fields, plan ahead for this use case when you decide your naming conventions. If you want to generate a combined course roster, create a report to do so.

Course Connections for Faculty, Staff, and Students

A Course Offering such as Probability Theory Fundamentals has over a hundred students enrolled for the Term, and a primary instructor, and several teaching assistants. Use the Course Connection object to model all of these Contacts' connections to the Course Offering.

You can use Course Connection record types to specify the nature of a Contact's involvement in a Course Offering. In our example, EDA's preconfigured Student and Faculty record types account for most of the people involved. For Faculty Course Connection records only, use the Primary field to specify the primary instructor for a Course Offering. You could create custom record types, such as Teaching Assistant to account for the TAs, or Staff Support to account for staff providing lab setup or A/V support.



For Student Course Connections, it can be handy to know which ones count toward satisfying a Program Plan's requirements. You can use the Program Enrolment ID field on a Course Connection record to track this facet of the data.

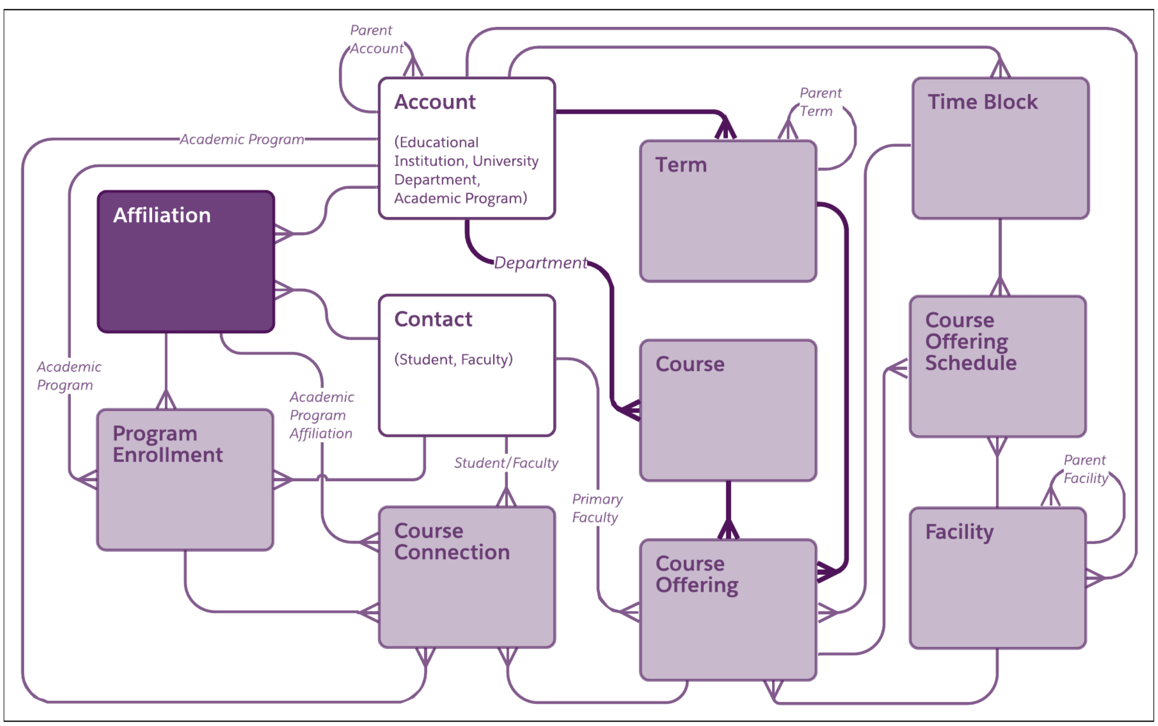
Tip
If you create the Course Connection in the context of a Contact's Program Enrolment, such as from the Course Connections related list *on the Program Enrolment record,* the Program Enrolment ID is automatically filled in for you. If you create the Course Connection without that context, such as from the Course Connections related list *on the Contact record*, you need to separately look up the Program Enrolment ID and enter it manually. For details about tracking students' Program Enrolments, see Model Program Offerings.

Course Connections give us useful views of related data. For example:

- From a Course Offering record, see all the Term Grades issued to students enrolled in that Term's offering of Probability Theory Fundamentals.
- From a faculty member's Contact record, see the history of their involvement with various Course Offerings and the distribution of their teaching responsibilities.
- From a student's Contact record:
  - Scan through their full list of Course Connection records to see their coursework history.
  - From their list of Program Enrolments, drill down into a specific Program Enrolment record, and see the Course Connections that count toward the Academic Program's requirements.

Courses and Curricula Recap

To sum up, we've looked at a number of EDA objects involved in modelling the who, what, when, and where of courses and curricula. Here's the bigger picture of these object relationships when we layer in students' Program Enrolments and Affiliations, as well.



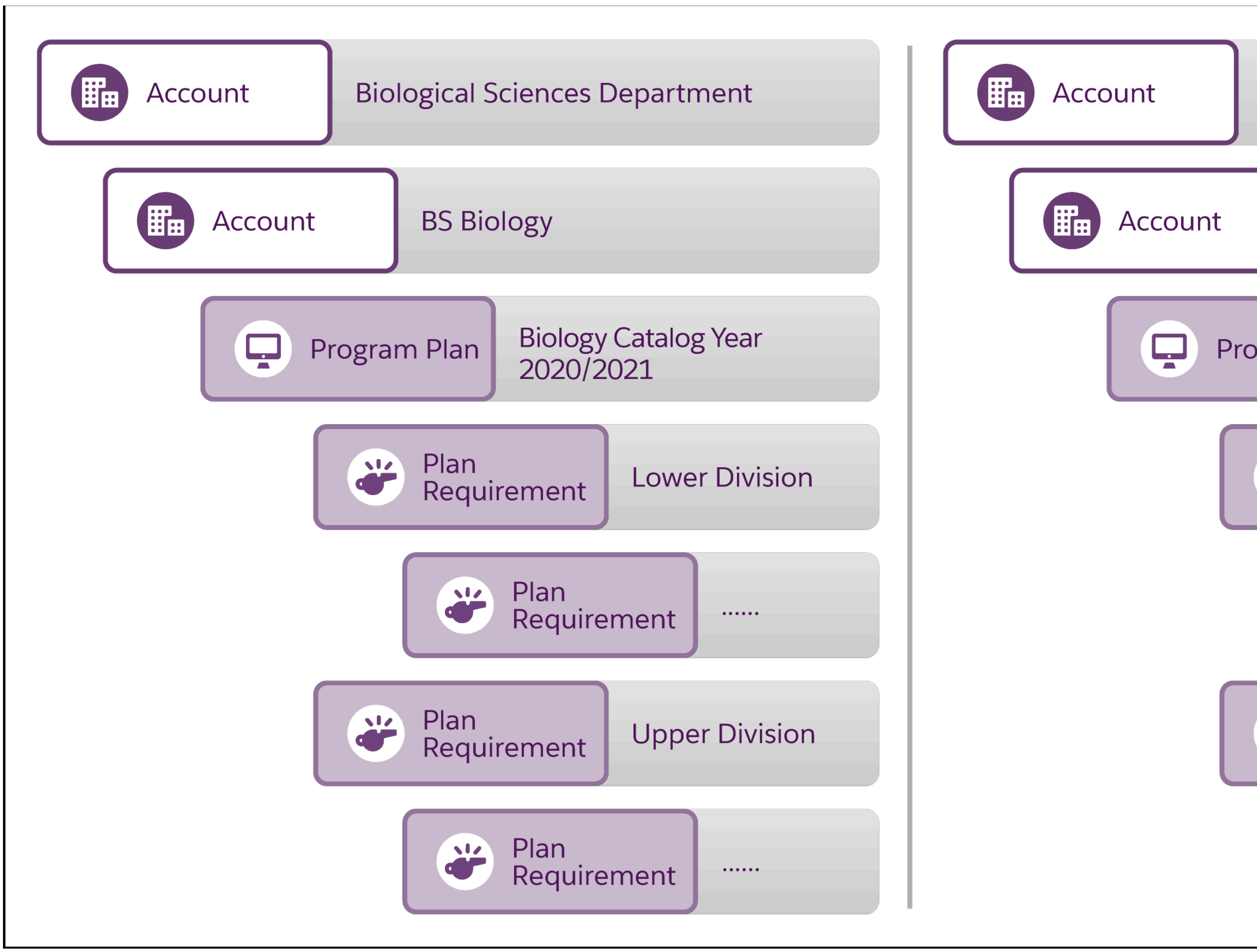
Model Program Offerings

Model your institution's programme offerings with the Programme Plan and Plan Requirement objects.

Model Program Offerings

Several objects that share a theme of "programs" let you model your institution's academic and other offerings–namely an Account record type called Academic Program, the Program Plan object, and the Plan Requirement object. Use this set of objects to track how your learning offerings are structured and administered, and what they require for enrolment and completion.

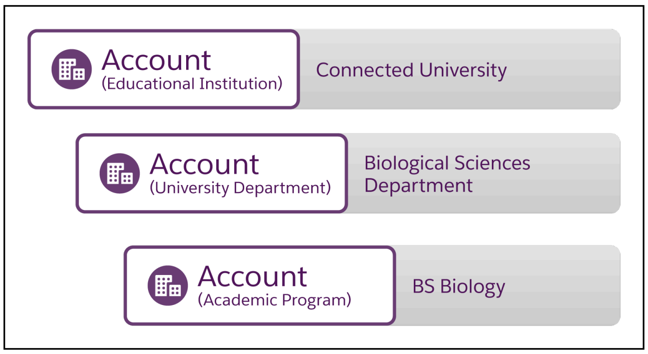
Programs, defined liberally, can be degree or credential programs, academic support programs, recreational programs, continuing ed, and more–all across the lifelong learning continuum. But we can use the same architectural building blocks to model them in EDA. As we look at these sample data structures for a degree program and an after-school program, consider the possibilities that they suggest for modelling your institution's own offerings.



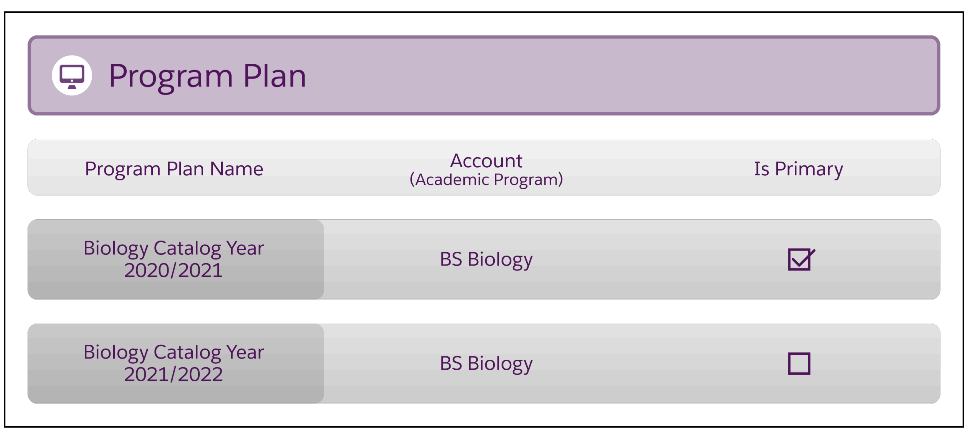
A Sample Degree Program Offering

The Biological Sciences Department at Connected University offers an undergraduate Biology degree. Account records represent these entities.

- Connected University is an Account with the Educational Institution record type.
- The Biological Sciences Department is an Account with the University Department record type.
- The BS Biology degree is an Account with the Academic Program record type. The Biological Sciences Department administers this degree, so the Academic Program's parent Account is the Department's Account record.



In order to earn the BS Biology degree, students must complete a sequence of study prescribed in the university's course catalogue. These high-level requirements for the major are organised using the Program Plan object. For the student cohort enrolling in the 2020-2021 academic year, a Program Plan record named `Biology Catalogue Year 2020/2021` represents the set of requirements in effect at that time—indicated by the Is Primary field. Program Plans have a limited shelf life. By the time Connected University finalises its catalogue for the next academic year, requirements have usually changed slightly and are then captured in another Program Plan record named `Biology Catalogue Year 2021/2022`.



So the Program Plan object represents a general set of requirements, while the Plan Requirement object represents specific requirements, such as specific Courses, thesis work, an internship, and so on. Plan Requirement records are typically part of a hierarchy. Parent Plan Requirements organise higher-level categories. Underneath, child Plan Requirements can be nested at multiple levels to detail the specifics.

For `Biology Catalogue Year 2020/2021`, here's a partial snapshot of the Plan Requirements hierarchy in effect for Biology undergrads who enrolled under that Program Plan. We've excluded some details for simplicity.

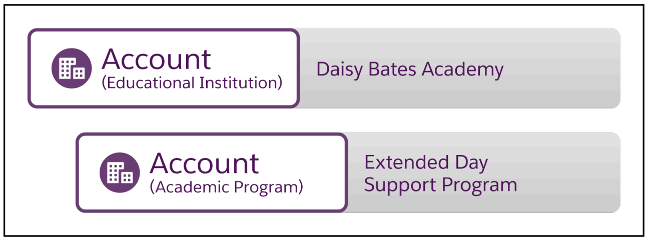
- Lower Division (72 units)
  - Core Sciences (56 units)
    - Biology (16 units)
      - BIO 10 (4 units)
      - BIO 20 (4 units)
      - ...
    - Chemistry (8 units)
      - CHEM 1A (3 units)
      - CHEM 1A Lab (1 unit)
      - CHEM 1B (3 units)
      - CHEM 1B Lab (1 unit)
    - Mathematics (8 units)
      - MATH 10 Applied Track (Optional)
        - MATH 10A (4 units)
        - MATH 10B (4 units)
      - MATH 20 Theory Track (Optional)
        - MATH 20A (4 units)
        - MATH 20B (4 units)
    - ...
  - General Electives (12 units)
    - Lower Division Language (4 units; any qualifying Course)
    - Lower Division Arts & Humanities (4 units; any qualifying Course)
    - Lower Division Social & Behavioural Sciences (4 units; any qualifying Course)
  - Service Learning (4 units; equivalent to 80 service hours)
- Upper Division (48 units)
  - ...

A Sample After-School Program Offering

At Daisy Bates Academy, the Extended Day Support Program offers after-school enrichment. Account records represent these entities.

- Daisy Bates Academy is an Account with the Educational Institution record type.

- The Extended Day Support Program is an Account with the Academic Program record type. Daisy Bates Academy administers this program, so the Academic Program's parent Account is the school's Account record.



For the 2020-2021 academic year, a Program Plan record named `Extended Day 2020-2021` represents that year's after-school offerings–indicated by the Is Primary field. The Extended Day Support staff meet at the end of the school year to review and tweak the next year's programming, which means that the `Extended Day 2021-2022` Program Plan is going to be even more responsive to students' needs.

Program Plan

Program Plan Name	Account (Academic Program)	Is Primary
Extended Day 2020-2021	Extended Day Support Program	☑
Extended Day 2021-2022	Extended Day Support Program	☐

So the Program Plan object represents either a general set of requirements or programs, while the Plan Requirement object represents either specific requirements or specific tracks within a program. Plan Requirement records are typically part of a hierarchy. Parent Plan Requirements organise higher-level categories. Underneath, child Plan Requirements can be nested at multiple levels to detail the specifics.

For the `Extended Day 2020-2021` Program Plan, here's a partial snapshot of the after-school program's Plan Requirements hierarchy. We've excluded some details for simplicity.

- After-School Learn
  - Tutoring
    - 1:1 Tutoring
    - Group Tutoring
  - Drop-In Workshops (Optional)
    - Chess (Optional)
    - Art Studio (Optional)
    - Writing (Optional)
    - Gaming Garage (Optional)
    - Outdoor Explorers (Optional)
  - Mentoring (Optional)
  - Therapeutic Learning (Optional)
- After-School Refuel and Nutrition
  - Meal Supplement Program
    - Standard Meal Supplement (Optional)
    - Special Diet (Optional)
  - Nutrition in the Kitchen (Optional)
- After-School Recreation and Fitness
  - Basketball (Optional)
  - Martial Arts (Optional)
  - ...

Go Beyond the Basics of Plan Requirements

As you can see from our examples, different flavours of Plan Requirement records make up the hierarchy–parent or nested, required or optional, and related to a specific Course or unrelated to a specific Course. In this general orientation to the EDA data model, it's beyond our scope to cover the details of creating all these records in the correct combinations.

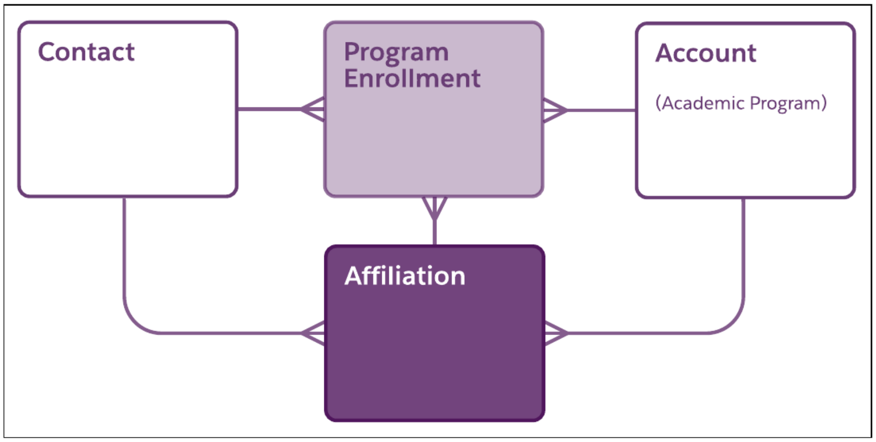
When you're ready to design your actual Plan Requirements hierarchy, see the detailed examples and scenarios at Plan Requirement.

Model Enrolments

Use the Program Enrolment and Affiliation objects to track a student's enrolments in academic and other programs.

Model Enrolments

Student enrolments in academic or other programme offerings are modelled with the Programme Enrolment and Affiliation objects.



Contacts' Program Enrolments

As we previously explored, `BS Biology` is an example of a degree-granting Academic Program. Consider now a student, Shay West, who decides to major in Biology and officially enrols in the Academic Program. A Program Enrolment record represents the enrolment. It relates Shay's Contact record to the BS Biology Academic Program record.

Looking at the full list of Program Enrolments on Shay's Contact record, we can see how his interests are shaping his educational journey at Connected University.

Program Enrolment ID	Related Academic Program	Represents Student's
PE-2281	BS Biology	Major degree
PE-2282	Neurobiology Concentration	Concentration within the major
PE-2405	Philosophy Minor	Minor degree
PE-3970	Study Abroad	Specialised study program

Similarly, the Program Enrolment records on the Contact record for a third-grader at Delano Elementary School could look something like this example.

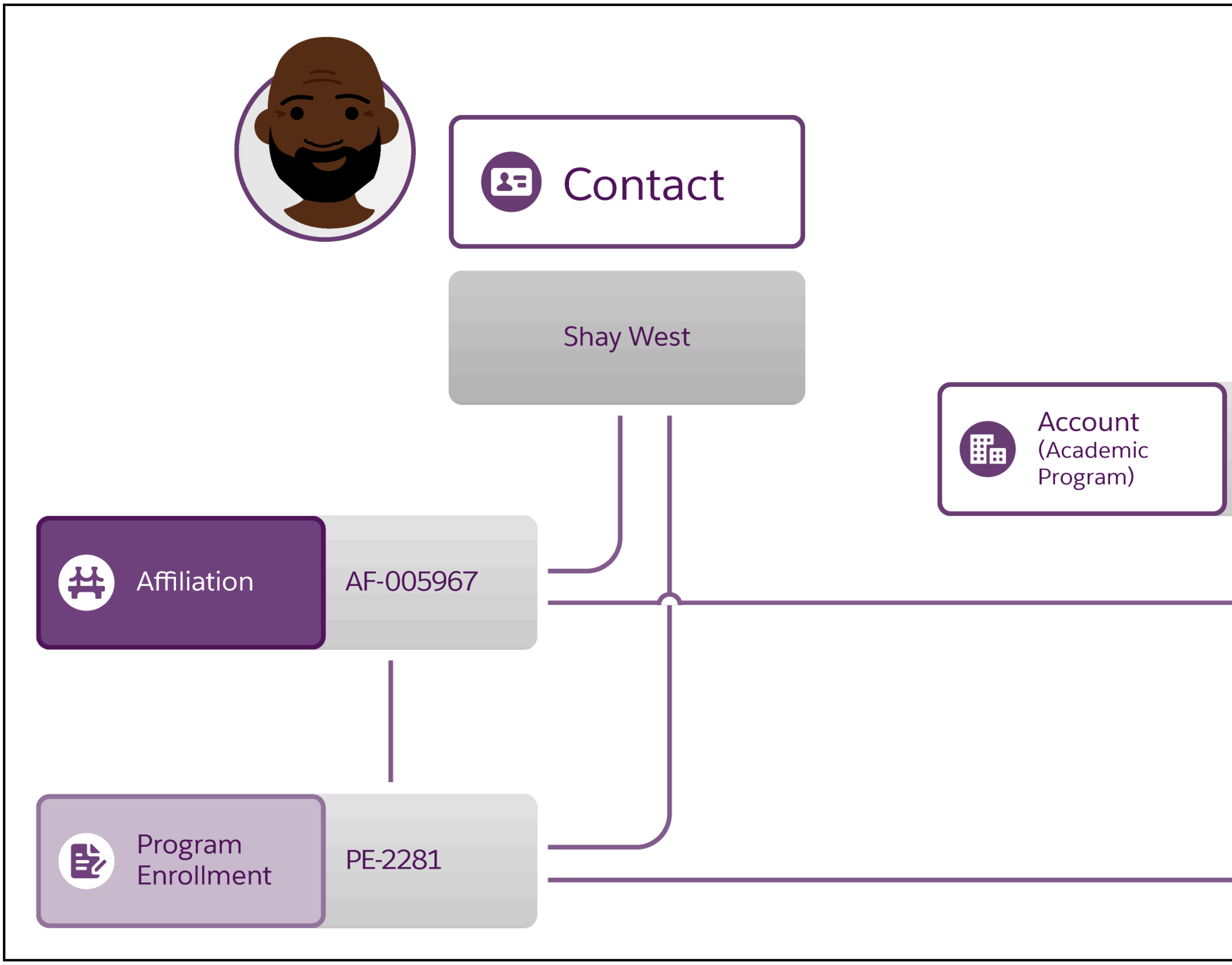
Program Enrolment ID	Related Academic Program	Represents Student's
PE-0106	Third Grade	Enrolment in third grade **Tip** If you're using K-12 Architecture Kit, the Grade Enrolment object lets you model grade enrolments specifically.
PE-0158	General Ed Transportation	School bus rider registration
PE-0352	Extended Day Support Program	After-school program registration

See Model Program Offerings.

Program Enrolments In Parallel with Affiliations

The Program Enrolment object relates a Contact to an Academic Program (Account). Specifically, it tracks a ***student*** Contact's enrolment data, such as enrolment dates and enrolment status. Program Enrolment serves a more specialised purpose than the Affiliation object, which similarly relates any kind of Contact–not just students–to any kind of Account–not just Academic Program Accounts. In EDA, Program Enrolments and Affiliations are used in parallel and come preconfigured with automation to keep their data in sync.

For example, remember Connected University student, Shay West, who's majoring in Biology? Shay's Contact record is related to the BS Biology Academic Program (Account) record by a Program Enrolment record, PE-2281. When that Program Enrolment record was created, Affiliation record AF-005967 was created automatically at the same time.



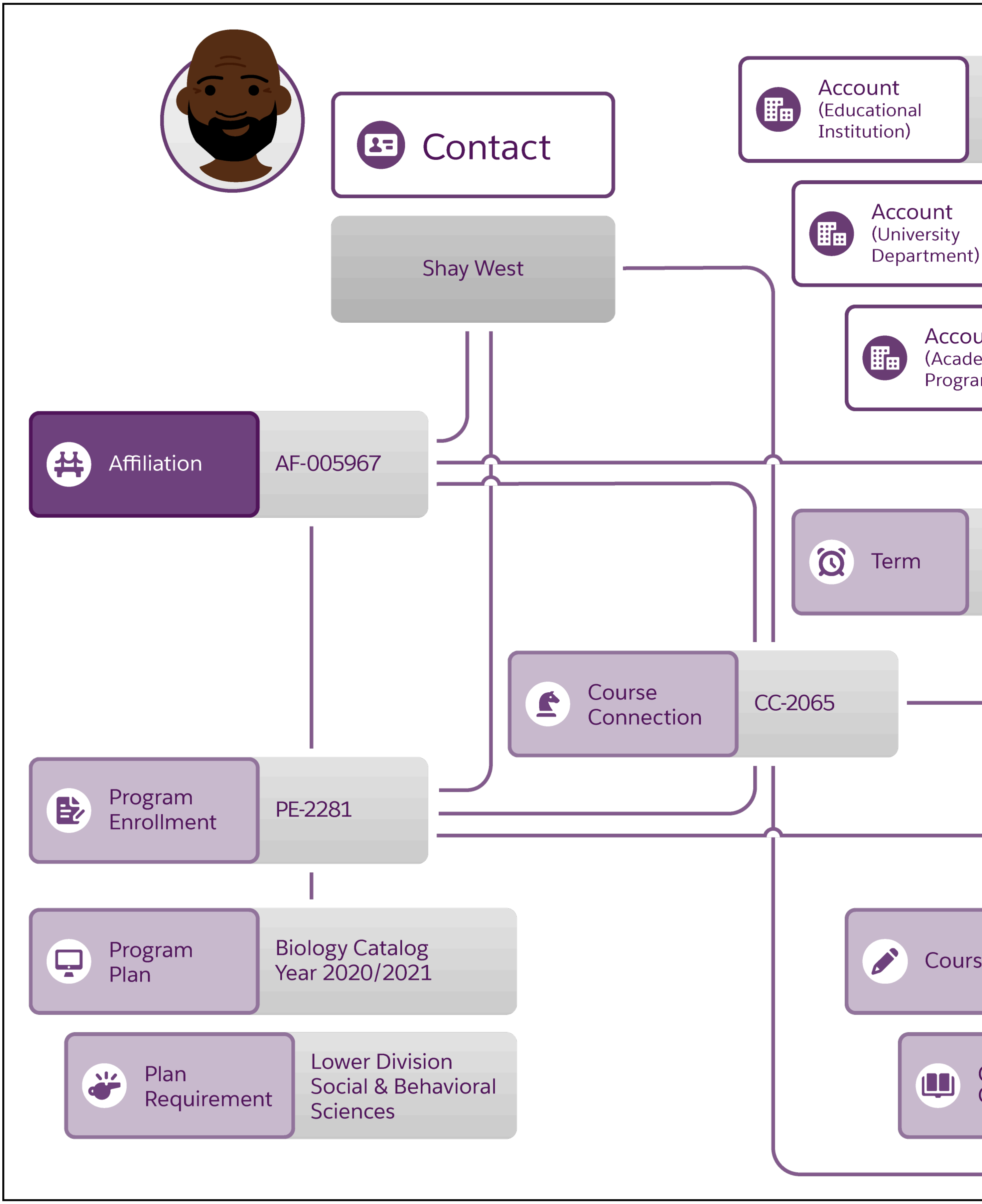
Even though the Affiliation connects the same two records connected by the Program Enrolment, it tracks more general-purpose data. It's one of a Contact's many affiliated Accounts, and tracks students', faculty members', and other people's involvement with campus and community organisations. Program Enrolment details don't apply to all types of Affiliations. Nor do they apply to all types of Contacts, which is why Program Enrolment data is tracked in a separate but related object.

Students' Program Enrolments can be changeable, as they explore their interests and complete various prerequisites before committing to an academic plan. And of course, plans sometimes change. If Shay changes majors, departments, or even colleges, someone makes sure that his Program Enrolment details are either updated, deleted, or created anew, and EDA automation keeps his corresponding Affiliation details updated, too.

Connect the Dots Between Enrolments and Program Offerings

Now that you've seen how to model the entities that administer Academic Programs, the programs themselves, and the students who enrol in those programs, we can connect the dots to create a bigger picture of these object relationships.

In this diagram, trace the connections that tell this part of the academic story for Biology major Shay West–from his Contact record to his affiliated Accounts, to his Program Enrolment in the major, to the Program Plan he's been assigned, and requirements for this academic plan.


Contact
Shay West
Account
(Educational
Institution)
Account
(University
Department)
Affiliation
AF-005967
Term
Course
Connection
CC-2065
Program
Enrollment
PE-2281
Program
Plan
Biology Catalog
Year 2020/2021
Plan
Requirement
Lower Division
Social & Behavioral
Sciences

Enrolments in Programs Versus Courses

Program Enrolments are for tracking students enrolling in degree programs, other types of academic programs, or other types of programs in general.

To track students enrolling in individual classes, use the Course Connection object, which relates a Contact to a Course Offering. See Model Courses and Curricula.

Model Attendance

Track student attendance and participation with the Attendance Event object.

Model Attendance

For attendance management, the Attendance Event object helps you track students' tardiness or absences, reasons for missed attendance, and total participation during a Term.

An Attendance Event record is always related to a Contact and always specifies a date. Other details, such as whether the missed attendance is for a specific Course Connection, and whether the missed attendance is unexcused, are optional. If your institution tracks tardiness or partial-day absences, you can also track arrival, departure, and return times.

Let's see how a set of Attendance Event records could look for a sample Contact. Clare Karombo is a senior at Daisy Bates Academy, where all seniors participate in a project-based seminar called Senior Integrated Learning. A Course Connection record, CC-0048, represents Clare's involvement in the class. The instructor tracks attendance at the weekly check-ins. So far this term, Clare has accrued a few excused absences.

Attendance Event records

Attendance Event Name	Course Connection	Unexcused	Date	Reason	Description
AE-0128	CC-0048	☐	10/10/2019	Family	Bereavement for grandparent.
AE-0992	CC-0048	☐	12/5/19	Other	Badminton travel tournament.
AE-1067	CC-0048	☐	12/12/2019	Medical	Urgent doctor's visit.

Absences are sometimes a sign that something's going on in a student's life that warrants a closer look. But in Clare's case, her teacher sees that she's otherwise punctual, present, and highly engaged in her community oral history project. Clare is on track for graduation, and her Attendance Event data doesn't signal a cause for concern.

Model Student Grades

Use the Term Grade object to build out a high-level overview of student performance.

Model Student Grades

Institutions typically use a learning management system (LMS) or student information system (SIS) to record periodic grade assessments, such as assignments and exams. With EDA, the focus is on creating a unified, 360-degree student profile that complements your LMS or SIS, rather than supplanting it. Use the Term Grade object to model students' major grade milestones, so that you can build out a higher-level overview of performance–in students' individual classes and in their academic track overall.

A Term Grade record captures a student's grade in a Course Offering, using your preferred grading scale–letter, numerical, or percentage grade. It can also categorise what the grade represents, such as Pass or Fail. Because Term Grades represent major grade milestones that correspond to the multiple grading periods within a Term, we can expect a single Course Offering to result in multiple Term Grade records for each student.

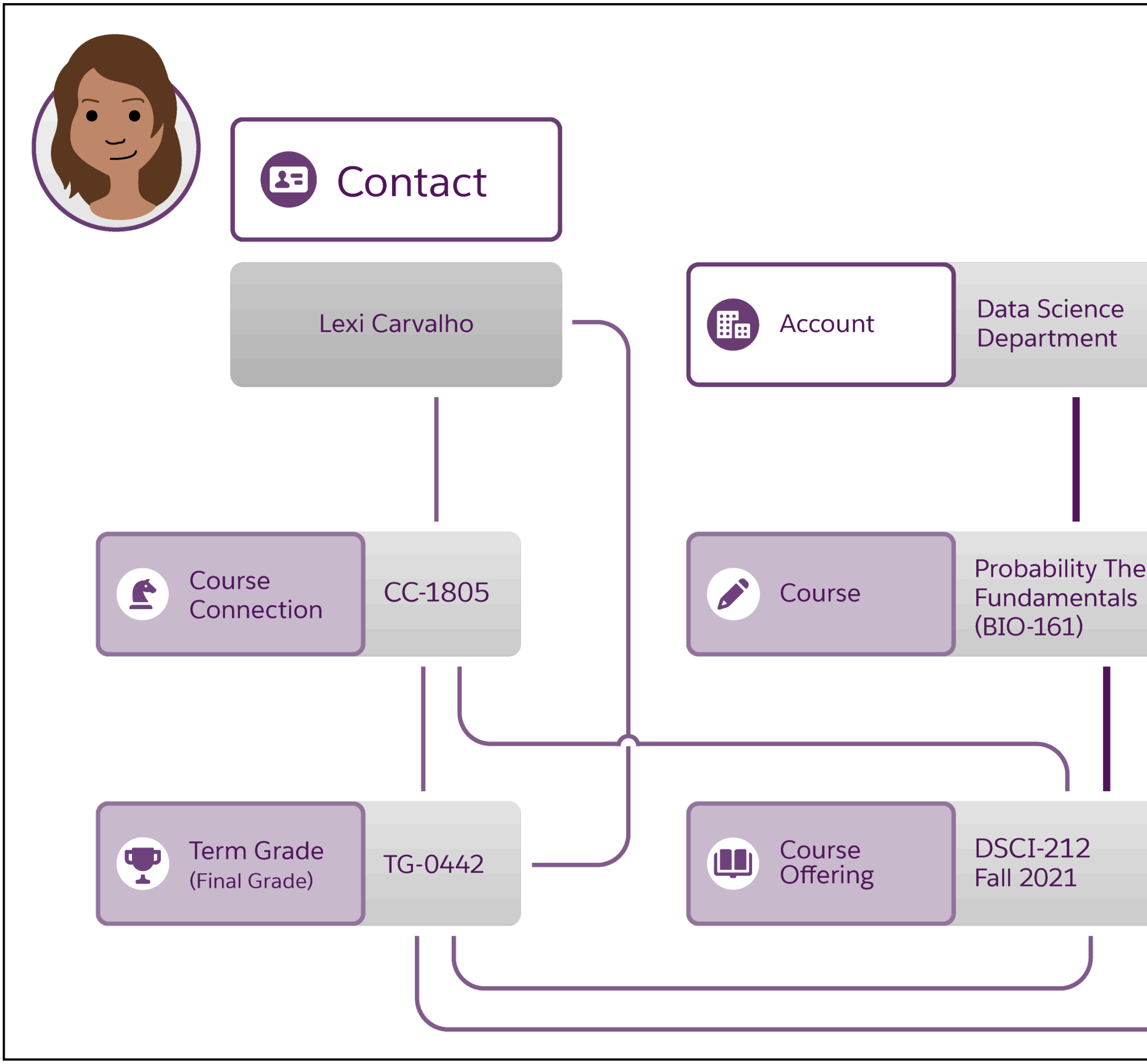
For example, during the Fall 2021 Term's Course Offering of Probability Theory Fundamentals, an instructor documents these Term Grade records for student, Lexi Carvalho.

Term Grade records

Term Grade Name	Contact	Course Offering	Course Connection	Term	Type	Numerical Grade	Result
TG-0330	Lexi Carvalho	DSCI-212 Fall 2021	CC-1805	Fall 2021	Mid-Term Grade	87.00000	Pass
TG-0442	Lexi Carvalho	DSCI-212 Fall 2021	CC-1805	Fall 2021	Final Grade	92.75000	Pass

The Term Grade object has a high degree of relatedness, in that it ties together data from a number of other objects. Besides the grade-related fields, a Term Grade record has fields that look up to the:

- Contact record that represents the student.
- Course Offering record that represents the instance of a Course being offered.
- Course Connection record that represents the student's enrolment in the Course Offering.
- Term record that's implied by the Course Offering, because a Course Offering is always related to a specific Term.



This relatedness means that after collecting Term Grade data and adding the Term Grade field to page layouts for such records as Course Offering or Contact, it's easy to see students' grades in various useful contexts. From a Course Offering record, see all the Term Grades issued to students enrolled in that running of the Course. From a Contact record like Lexi Carvalho's, see all of her Term Grades and Course Connections. And, set up reports and dashboards to proactively monitor student progress and performance.

Note

For tracking grade point averages, use the GPA field on the Programme Enrolment object.

Model Certifications and Credentials

Keep track of an individual's achievements using the Academic Certification and Credential objects.

Model Certifications and Credentials

A student's GPA or a list of courses they took aren't the only ways to measure success. Most institutions want to see a broader and more comprehensive picture of each student. What did they achieve outside of the classroom, as well as in it? Were they recognised in other ways beyond a report card? Keeping track of similar information for faculty and employees is also a priority for most institutions. What licences does an individual need to maintain for accreditation? What other certifications do my staff hold? You can track all of this information using the Academic Certification and Credential objects.

Academic Certifications Versus Credentials

First, let's go over the differences between Academic Certification and Credential.

Academic Certification

Represents a diploma, degree, or academic certificate that a student has earned. These records are associated with a Contact's Education History record. Here are some examples of certifications.

- A high school diploma from Trailblazer Academy
- A B.A. in Music from Connected University
- A certificate acknowledging completion of a teacher training program

Credential

Represents an industry or organisational achievement. It's a one-and-done certification that has no parts to it. Credentials can be a badge, a non-credit certification, or a licence. These records are associated with a Contact's Attribute record. Here are some examples of credentials.

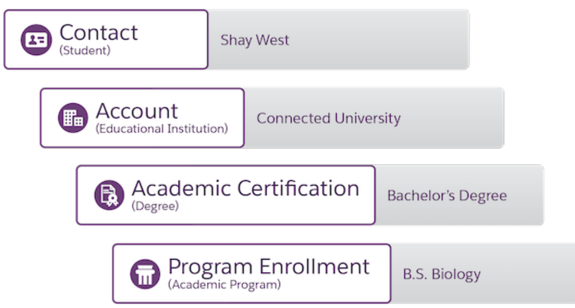
- A badge issued by your institution for a specific achievement
- A teaching certificate issued by a state
- A bus driver's Commercial Driver's Licence (CDL)

Track a Contact's Achievements

You can use the Academic Certification and Credential objects with the Educational History and Programme Enrolment objects to get a complete understanding of a student's achievements. You can see that the student earned a degree from a specific institution by completing a programme of study.

For example, Shay West earned a Bachelor's Degree from Connected University in Biology. Here's how these different objects work together to create a complete story of Shay's achievements.

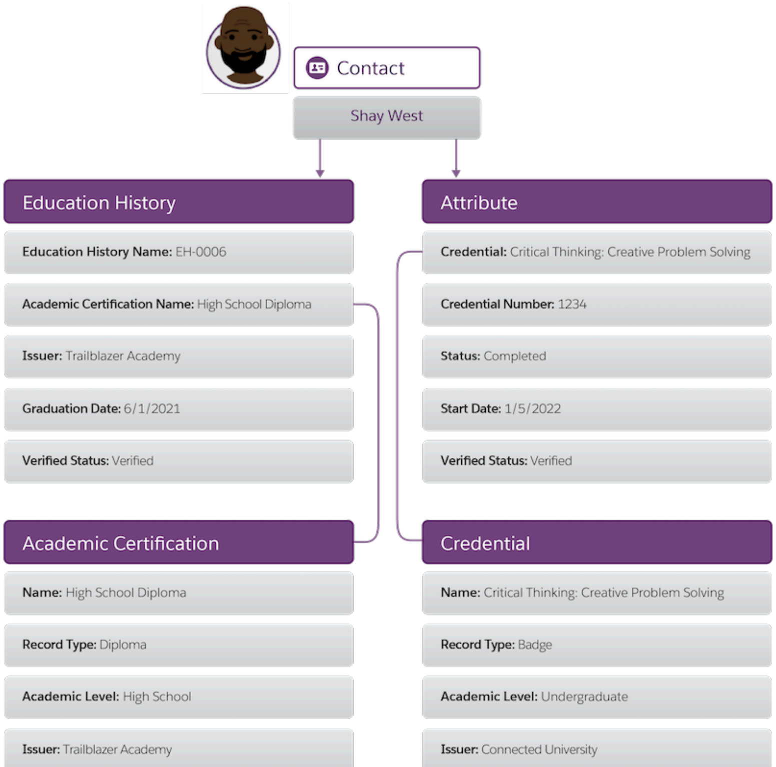
- Shay West is a Contact.
- Connected University is an Account with the Educational Institution record type.
- Bachelor's Degree is an Academic Certification with the Degree record type.
- B.S. in Biology is a Programme Enrolment with the Academic Programme record type.



See Achievements on the Contact Record

Looking in the Education History section of Shay's Contact record, we can see the diplomas and degrees that he previously earned. Each Educational History record lists a certification that was earned from an educational institution.

Likewise, in the Attributes section of Shay's Contact record, we can see other Credentials, such as badges, certifications, and licences. Each Attribute record lists a credential that was earned from an educational institution.



Add Credentialling Identifier Field to Account and Contact Objects

Some credentials have an International Resource Identifier that uniquely identifies the credential. You can create a custom field for Credentialling Identifier and add it to the Account and Contact page layouts.

To add Credentialling Identifier to your page layouts:

1. Click , then click **Setup**.
2. Click the **Object Manager** tab.
3. Click the object that you want to add Credentialling Identifier to.
4. Click **Fields & Relationships**, and then click **New**.
5. Click **Text**, and then click **Next**.
6. In the Field Label field, enter `Credentialling Identifier`.
7. In the Length field, enter `255`.
8. In the Field Name field, enter `Credentialing_Identifer`.
9. In the Description and Help Text fields, enter `An International Resource Identifier that uniquely identifies an Account for credentialling purposes`.
10. Check the **Do not allow duplicate values** box.
11. Make sure **Treat "ABC" and "abc" as duplicate values (case insensitive)** is selected.

12. Check the **Set this field as the unique record identifier from an external system** box and click **Next**.
13. Select the profiles that you want to add Credentialling Identifier to and click **Next**.
14. Select the page layouts that you want Credentialling Identifier to be on and click **Save**.

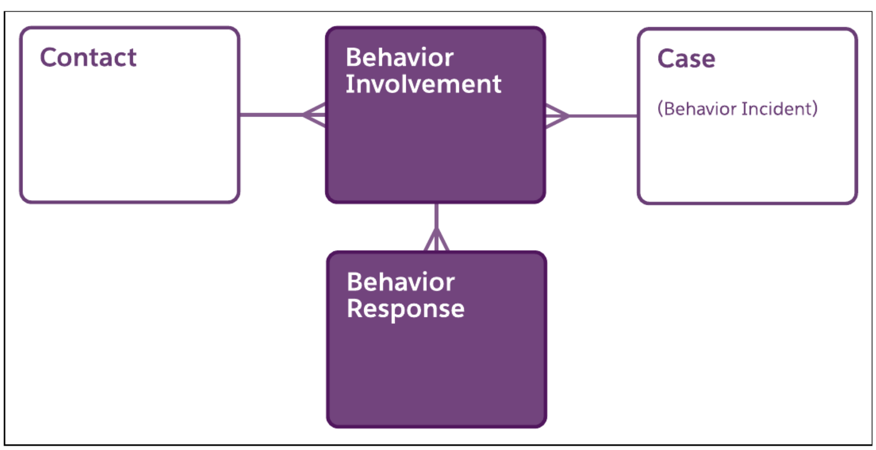
Model Behaviour Management

Monitor student behaviour with the Case, Contact, Behaviour Involvement, and Behaviour Response objects.

Model Behaviour Management

Sometimes student interactions don't meet your institution's behaviour expectations. Other times, student actions embody the highest values expressed in a school's honour code. For monitoring both problematic and praiseworthy behaviour, use the Case, Contact, Behaviour Involvement, and Behaviour Response objects as part of an overall behaviour management program.

EDA custom fields have been added to the standard Salesforce Case object to track the type of behaviour event and when and where it occurred. An EDA custom object, Behaviour Involvement, is a junction object that relates individual Contacts to the behaviour event, such as the students involved and perhaps a faculty member who witnessed or reported the event. Another custom object, Behaviour Response, tracks the corrective or affirmative responses applied to the Contacts involved.



Let's consider a sample incident involving two students during a science lab that results in lab equipment damage and hurt feelings. This sample set of data records captures the incident and the school's responses.

Case records

Case Number	Category	Location	Occurrence Date
00001026	School Code of Conduct	On Campus	2/23/21, 2:45 PM

Behaviour Involvement records

Behaviour Involvement Name	Case	Contact	Role	Description
BI-0483	00001026	Pat Runyon	Perpetrator	Engaged in verbal taunts that escalated to shoving incident. Damaged glass labware.
BI-0484	00001026	Kelly Parks	Perpetrator	Engaged in verbal taunts that escalated to shoving incident. Damaged glass labware.
BI-0485	00001026	Carol Merrit	Witness	Lab aide intervened and de-escalated the situation.
BI-0486	00001026	Israel Laban	Reporter	Chem instructor in charge.

Behaviour Response records

Behaviour Response Name	Behaviour Involvement	Contact	Description
BR-6580	BI-0483	Pat Runyon	Referred to Peer Mediation Program. Must complete mediation by 3/2/21.
BR-6581	BI-0483	Pat Runyon	Assigned 5 hours of campus community service (paired with co-perpetrator).
BR-6583	BI-0484	Kelly Parks	Referred to Peer Mediation Program. Must complete mediation by 3/2/21.
BR-6584	BI-0484	Kelly Parks	Assigned 5 hours of campus community service (paired with co-perpetrator).

If you decide to implement EDA behaviour management features, the data you gather becomes a powerful tool for continuous monitoring. Use Salesforce reports, dashboards, and data analytics to stay on top of case resolution, detect at-risk behaviour patterns, and learn which interventions support student success the most.

Model Suspects and Prospects

Identify and recruit the best-fit applicants for your institution.

Model Suspects and Prospects

In order to find the best-fit applicants for your institution, recruiting tracks suspects and prospects. Use the standard Lead and Contact Salesforce objects to track suspects and prospects, respectively. Here's why: Prospects have signalled interest in your institution, so creating a Contact record for them gives recruiting teams more robust detail to better engage with potential students. Suspects, on the other hand, haven't yet signalled interest so it's premature to create Contacts for them. When a suspect does raise their hand, convert the Lead to a Contact and Account.

Note

Your institution can choose to model suspects and prospects differently using EDA's flexible architecture. However, this approach is our recommendation for EDA.

At Connected University, the recruiting team is looking for applicants from the East Coast. They have a list of recent PSAT takers in that region who have agreed to share their information with schools, but haven't specifically reached out to Connected University. The recruiting team prepared the list and imported the data to create Lead records for each suspect. Let’s look more closely at one suspect, Louis Lombard.

Lead record

Record name	Record created when...	Record represents...
Louis Lombard	Connected University imported a list acquired from a testing service.	A suspect who hasn't signalled interest in the university.

The recruiting team sends targeted marketing emails to the Leads, and Louis responds to one asking for more information about the Computer Science program. A recruiting team member responds to his email and then converts Louis’s Lead record, which creates these records.

Contact record

Record name	Record created when...	Record represents...
Louis Lombard	Louis's Lead record was converted.	A prospect who has signalled interest in the university.

Account record

Record name	Record created when...	Record represents...
Lombard Administrative Account	Louis's Lead record was converted.	The container Account for a prospect's Contact record, assuming Connected University uses the Administrative Account model.

Opportunity record

Record name	Record created when...	Record represents...
Lombard- Undergrad Fall '22	Louis's Lead record was converted.	An official chance for the prospect to enrol at the university.

To track Louis as a prospect who's interested in the Computer Science program, the recruiter also creates an Affiliation record.

Affiliation record

Record name	Record created when...	Record represents...
AF-123456	A recruiting staff member updates Louis's Contact record.	Louis's interest in the Computer Science programme. • Organisation is set to B.S. in Computer Science • Role is set to Prospect • Status is set to Current

Now the recruiting team can deliver Louis a more personalised recruitment experience that focuses on what the Computer Science programme can offer.

For more information about how to configure and use Leads in EDA, see Lead. Also review our recommendations for importing Leads in Recommended Data Import Sequence for EDA.

Model Admissions Applications

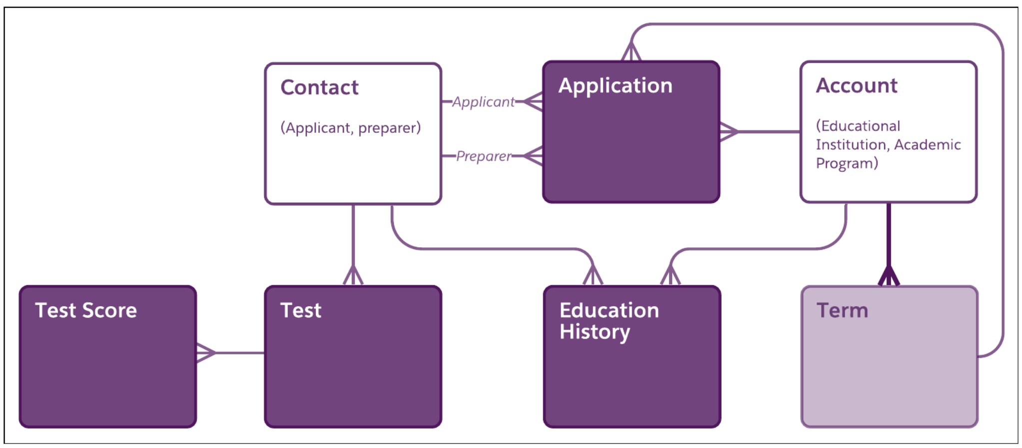
Review and manage an applicant's information, education history, and qualifications.

Model Admissions Applications

Application management in EDA relies on several custom objects for modelling an applicant's information, education history, and qualifications–namely Application, Affiliation, Education History, Test, and Test Score.

First, let's summarise the basics of these admissions-focused objects.

- The Application object is related to the Contact who represents an applicant to an institution or a program. It can also be related to the Contact who prepares an Application on behalf of the applicant Contact.
- An Application record is always for a specific programme, and often for a specific Term.
- The Education History object relates the Contact to the educational institutions (Accounts) where they've studied.
- The Test and Test Score objects help you track testing-related data such as standardised tests and entrance exams, if your institution accepts test score data. A Test Score record is a child of a Test record.



Let's see an example of how an applicant's data records can be structured in EDA. Student Madison Hadzic is a senior at Daisy Bates Academy, applying to Connected University for undergraduate admission in the 2021-2022 Fall Term. Here's how the Admissions team has tracked her budding relationship with Connected University, starting from the time that Madison first came on the university's radar. Each table summarises what type of record was created, and when, and why.

Contact record

Record name	Record created when...	Record represents...
Madison Hadzic	Madison attended a Connected University virtual recruiting event during the summer between her junior and senior years, and signalled her intent to apply.	A student with qualified interest in attending Connected University.

Account name

Record name	Record created when...	Record represents...
Madison Hadzic Administrative Account	Madison's Contact record was created.	The container Account for an applicant's Contact record, assuming Connected University uses the Administrative Account model.

Affiliation name

Record name	Record created when...	Record represents...
AF-123987	Madison's Contact record was created.	Madison’s interest in Connected University as a prospect. • Organisation is set to Connected University • Role is set to Applicant • Status is set to Current

If Madison is later admitted, this Affiliation record can be updated so that her Role is set to Student.

Application record

Record name	Record created when...	Record represents...
APP-2681	Madison started filling out her application.	A student's admissions application.

Education History record

Record name	Record created when...	Record represents...
EH-8925	Connected University receives Madison's educational history data from her Application and structures it in Education History records.	The applicant's current attendance at an educational institution, Daisy Bates Academy.
EH-8937	Connected University receives Madison's educational history data from her Application and structures it in Education History records.	The applicant's completion of a summer study programme at an educational institution, Aroha University.

Test record

Record name	Record created when...	Record represents...
TST-6442	Connected University receives Madison's testing data from her Application and structures it in Test records.	The first time the applicant took a standardised test, the ACT.
TST-6443	Connected University receives Madison's testing data from her Application and structures it in Test records.	The applicant retaking a standardised test, the ACT.

Test Score record

Record name	Record created when...	Record represents...
SCR-3160	Connected University receives Madison's testing data from her Application and structures it in Test Score records.	The results from the first time the applicant took the ACT.
SCR-3163	Connected University receives Madison's testing data from her Application and structures it in Test Score records.	The results from the applicant retaking the ACT.

Additional objects for managing application requirements and the application review process are available through Admissions Connect, an application from Salesforce.org that further customises EDA for the admissions lifecycle. Learn more in the Admissions Connect Documentation.

Install EDA

Learn how to install EDA, including prerequisites, compatibility restrictions, and the packages installed.

Prerequisites and Compatibility

Learn about installation requirements, compatibility restrictions, and other considerations when installing EDA.

Operational Requirements

You can install EDA in Enterprise and Unlimited Edition Lightning Platform orgs. The profiles and layouts that come with Enterprise Edition or higher are required. For development and testing, you can use a Developer Edition org.

EDA is primarily a data architecture providing objects configured for education. Access to the standard Account and Contact objects is required. Access to the standard Case object is required if you use the preconfigured behaviour management features.

Licence requirements depend on your business requirements. If you have questions about license types, see User Licences in Salesforce Help and consult with your Account Executive.

- Implementations commonly rely on Service Cloud licences (typically to manage student enrolment, counselling, or case management) or Sales Cloud licences (typically to draft quotes and invoices for students).
- If your requirements include setting up an online portal for applicants to apply, check on application status, and add supporting documents, consider augmenting with Marketing Cloud and communities licences.

- With a Lightning Platform licence, users can access EDA in that they can access the Account object, the Contact object, and the package's custom objects. However, this limited access can be insufficient for CRM workflows commonly used alongside EDA , such as those using the Case, Lead, Opportunity, or Campaign objects.
- If you're using a Salesforce for Education product built on top of EDA, such as Advisor Link or Gift Entry Manager, keep in mind that each product has its own operational requirements.
- My Domain must be enabled in your org before you install EDA . To find out if My Domain is enabled, from Setup, search for and select **My Domain**. To learn more, including how to enable My Domain, see My Domain in Salesforce Help.

NPSP and EDA Compatibility

EDA and Nonprofit Success Pack (NPSP) are not intended to be installed in the same org. If you install them together, Salesforce.org cannot provide support for your org.

For more information, see Avoid Installing NPSP and EDA in the Same Org.

Existing Salesforce Orgs and EDA

If you're considering installing EDA in an existing org, analyse custom objects you've created and map them to EDA objects to determine whether it's a good fit. If processes in your existing org are very different from your intended use of EDA and you expect little to no overlap between your current org's data and the data in EDA, consider implementing EDA in its own org with an integration to your existing org.

EDA and Person Accounts

EDA doesn't support Person Accounts. However, you can install it in an org with Person Accounts enabled.

If Person Accounts aren't already enabled, don't enable them because you can't turn off the feature after it's enabled. To completely remove Person Accounts, you need to apply for a new Salesforce org and request a licence transfer. Then migrate existing data from your current org to the new one. Ask your Account Executive for help with this process.

If you must leave Person Accounts enabled:

- Make sure that you do not use the Person Account record type to manage your student records. Instead, use the Administrative or Household Account record type.
- If you plan to do lead conversion, make sure that the Person Account record type isn't set as the default record type for the profile of the user who is converting the lead.

What's Installed

Learn about the packages installed with EDA, and identify the components that you can modify.

What's Installed

When you install EDA , you get:

- A managed package that contains essential metadata and custom code. These components, such as objects and fields, can't be modified by your org. They're locked with limited edit access to allow the managed package to be upgraded later.
- An unmanaged package that contains metadata-like permission sets on standard objects and various record types. Except for the Administrative and Household Account record types, which the EDA account model requires, System Administrators can modify or delete unmanaged package metadata.

For details about managed and unmanaged packages, see Understanding Packages in Salesforce Help.

Install EDA

Install EDA in new or existing org.

Install in Your Org

Learn which products you can install Education Data Architecture (EDA)) for.

EDA can be installed in Enterprise and Unlimited Edition Lightning Platform orgs with licences for these Cloud services:

- Service Cloud–Manage student enrolment, counselling, or case management.
- Sales Cloud–Draft quotes and invoices for students.
- Marketing Cloud and Experience Cloud, as needed to support your organisation's business requirements. Set up an online portal for applicants to apply, check on application status, add supporting documents, and more.

The best way to get started with EDA is with a trial, which provides the app preconfigured in a new Salesforce org. If you'd rather install EDA in an existing org, make sure that you meet the installation prerequisites.

Start with the Trial in a Fresh Org

If you don't need to install the app in an existing Salesforce org, head over to the EDA trial page to sign up.

Install Salesforce in an Existing Org

If you prefer to install EDA in an existing org rather than starting with the trial, use the installer.

1. Make sure you're logged out of all other Salesforce orgs. Consider using an incognito window to log in to the desired org.
2. Go to the EDA installer page.
3. Click **Log In to Start Pre-Install Validation**.
4. Choose **Production or Developer Org**, **Sandbox or Scratch Org**, or **Use Custom Domain**.
5. Acknowledge the product terms of use and click **Confirm**.
6. Click **Install**.

If the installation succeeds, a confirmation page appears. If you encounter errors, get help resolving them by following the instructions in Reporting Issues.

Set Up Security

Configure the permissions in your org to give every user at your institution the right level of access.

EDA Security Model Considerations

Designing your security and sharing model is an essential part of your implementation. Its many aspects are more than we can cover here. Controlling security in Salesforce takes a systematic, multi-layered approach at all levels of your org. However, we do highlight considerations for administrators managing sensitive student data.

Know the Basics of the Salesforce Security Model

If you're not familiar with concepts in the Salesforce security model such as org-wide sharing, permission sets, profiles, and sharing rules–at a minimum–we strongly recommend that you first learn the basics with these resources.

- Control Who Sees What in Salesforce Help
- Protect Your Salesforce Organisation in Salesforce Help
- Trailhead: Data Security

Then rejoin us here for security considerations that can apply to some educational institutions.

Security Considerations for Educational Institutions

If your institution is subject to Family Educational Rights and Privacy Act (FERPA) requirements, consider those requirements as part of your security model. Account for the protection of Personally Identifiable Information (PII) in students' education records. Our product is preconfigured with a FERPA checkbox field on the Contact object to identify students whose records are subject to FERPA requirements. You can optionally use this field and apply your own business logic to it, as needed.

If your institution is a HIPAA-covered entity and is subject to HIPAA requirements, consider those requirements as part of your security model, including accounting for the protection of Protected Health Information (PHI) maintained outside of FERPA education records. Our product comes preconfigured with a HIPAA checkbox field to identify individuals whose records are subject to HIPAA requirements and a HIPAA Detail rich text field (intended for information about the student, such as the names of Contacts authorised to communicate about the student) on the Contact object. You can optionally use these fields and apply your own business logic to them, as needed.

To help secure your sensitive data, you can implement a host of security features that come with Salesforce. To name just a few examples:

- Set your org-wide default sharing settings to Private, which is the most restrictive access possible.
- Identify the data access requirements for users in your various departments. Create profiles for the roles in those areas, and permission sets to grant permissions to roles or individual users.
- Create a role hierarchy to give users above another user in the hierarchy the same level of access to records owned by or shared with users below.
- Set field-level security to control who can access and edit certain fields on specific records.
- Create sharing rules to open up record access to other users besides the record owners.
- Set up authentication and authorisation methods to control who sees what data, when, and from which locations and devices.

For some institutions, data encryption can be an additional access control tool for securing sensitive data. Salesforce offers Shield Platform Encryption as a solution for encrypting data at rest, meaning that data is encrypted when it's being stored within Salesforce. Learn more at Strengthen Your Data's Security with Shield Platform Encryption in Salesforce Help.

As every institution has unique privacy policies and regulatory requirements, not to mention unique Salesforce.org configurations used in combination with other information systems, we encourage you to consult with your security, legal, and regulatory specialists.

Set Custom Field-Level Security

Update security permissions for the profiles that you assign to your users so that they have the access that they need.

Set Custom Field-Level Security

Configure profile access to fields for your educational institution.

1. From Setup, in the Quick Find box, search for and then select **Profiles**.
2. Click a profile to open its settings.
3. Under Custom Field-Level Security, click **View** next to the setting that you want to update.
4. Click **Edit** and set the appropriate permissions.
5. Save your changes.

Set Up Permissions and Access

Update object permissions for the profiles that you assign to your users so that they see the objects that they need.

Set Custom Object Permissions

Configure profile access to custom objects for your educational institution.

1. From Setup, in the Quick Find box, search for and then select **Profiles**.
2. Next to the profile that you want to update, click **Edit**.
3. Under Custom Tab Settings, select **Default On** for the tabs that you want to make available to this profile from the App Launcher, navigation menus, and so on.
4. Under Custom Object Permissions, set the appropriate permissions.
5. Save your changes.

Configure EDA

Configurations and customisations for EDA.

Configure EDA Basics

Assign record types to profiles, and page layouts to record types, so that users have access to the records that they need.

Assign Record Types to Profiles

Depending on the version that you started with, it's possible that some record type assignments are different in your org. Make sure that these record types are assigned to the System Administrator profile, at a minimum, and repeat this configuration for other profiles as needed.

> **Note**
> Most record types are assigned by default. The Incident record type for Case is an exception.

Academic Certification
: Certificate, Degree (default), Diploma

Account
: Academic Programme, Administrative (default), Business Organisation, Educational Institution, Household Account, Sports Organisation, University Department

Attribute
: Credential (default), Student Characteristic

Case
: Master (default), Incident (not assigned)

: Faculty/Staff, Guardian, Student (default)

Course Connection
: Default, Faculty, Student (default)

Credential
: Badge, Certification (default), Licence

Customise record type assignments or add assignments to other profiles as needed.

1. From Setup, in the Quick Find box, enter `Profiles`, then select **Profiles**.
2. Click the profile to assign record types to.
3. Click **Object Settings**.
4. Click an object, for example, **Cases**.
5. Click **Edit**.
6. Select **Assigned Record Types** and **Default Record Type** for the profile.
7. **Save** your changes.

Assign Page Layouts

For objects with page layout assignments that vary by record type, and for custom objects, the default page layout assignments can require configuration. Make sure that these layouts are assigned to the System Administrator profile, at a minimum, and repeat this configuration for other profiles as needed.

Academic Certification Record Types

- Certificate, Degree, and Diploma: EDA Academic Academic Certification Layout

Account Record Types

- Academic Department, Academic Program, Administrative (default), Business Organisation, Educational Institution, Sports Organisation, University Department: HEDA Organisation Layout
- Household Account: HEDA Household Layout

Attribute Record Types

- Credential: EDA Credential Layout
- Student Characteristic: EDA Student Characteristic Layout

Case Record Types

- Master: Case Layout
- Incident: EDA Incident Layout

Contact Record Types

- Master: HEDA Contact Layout
- Custom Contact record types: HEDA Contact Layout

Course Connection Record Types

- Default, Faculty, and Student: HEDA Course Enrolment Layout

Credential Record Types

- Badge, Certification, and Licence: EDA Credential Layout

For more help, see Assign Page Layouts to Profiles or Record Types.

Assign Compact Layouts

Make the HEDA Account Compact Layout and the HEDA Contact Compact Layout the primary compact layouts for all your record types. By default, the HEDA compact layouts aren't assigned to EDA Account and Contact record types.

1. Click , then click **Setup**.
2. Click the **Object Manager** tab.
3. In the list of objects, click **Account**.
4. Click **Compact Layouts**.
5. Click **Compact Layout Assignment**.
6. Click **Edit Assignment**.
7. From the **Primary Compact Layout** menu, select **HEDA Account Compact Layout**.
8. **Save** your changes.
9. Repeat these steps to assign the HEDA Contact Compact Layout to the Contact object.

That's it! You're now all set up to start using EDA.

Enable EDA Apex Class Access

Verify access to EDA Apex classes for all profiles and permission sets that need them.

Enable EDA Apex Class Access

Features such as EDA Settings and Settings Health Check require access to certain EDA Apex classes. Depending on the EDA version that you started with, the System Administrator profile sometimes already has access, but we recommend verifying access for all profiles that need them, and for permission sets as needed.

1. From Setup, search for, then select **Profiles**.
2. Click the profile name, such as **System Administrator**.
3. Click **Enabled Apex Class Access**.
4. For each feature, make sure that the required Apex classes are enabled.

Feature	Apex Classes Required
EDA Settings	• CMP_SettingsDataProvider • STG_Base_CTRL • STG_CourseConnections • STG_Courses • UTIL_Describe • AccountModelSettingsController • AccountNamingBatchController • AccountNamingSettingsController • AddressSettingsController • AffiliationsSettingsController • AffiliationsWithProgramEnrollController • ApplicationSettingsController • ContactInfoSettingsController • CourseConnectionSettingsController • EDASettingsController • EducationCloudSettingsController • ErrorSettingsController • HierarchySettingsChangesController • PreferredPhoneEmailBatchController • ProgramSettingsController • ProgramPlanSettingsController • RelationshipSettingsController • ReleaseGateController • VersionCleanupBatchJobController
Settings Health Check	• HealthCheckController • HealthCheckGroupController

Education Cloud Settings

Access and manage EDA Settings, activate the latest EDA release, and find helpful resources.

Overview

In EDA 1.114 (Summer '21), EDA introduced the Education Cloud Settings page. This is a single location for all settings, tools, and resources that you need to manage your Education Cloud org.

Use Education Cloud Settings to access:

- EDA Settings for org-wide administration of the Account model, contact information, Relationships, Affiliations, Courses and Enrolments, Errors, and system tools.
- Settings Health Check to identify configuration inconsistencies or errors in EDA Settings and related settings in Setup.
- Release Management to review and activate the latest EDA release.
- Links to resources such as Trailhead, the Trailblazer Community, and the Salesforce.org YouTube channel.

Configure Education Cloud Settings

The steps to configure Education Cloud Settings vary depending on the version of EDA that you started with.

- If you started with a trial org of EDA version 1.114 (Summer '21) or later, you're ready to use Education Cloud Settings.
- If you started with a version of EDA before 1.114, grant Apex class access, create the Education Data Architecture app, which includes configuring the Education Cloud Settings tab. Then, verify access to the app for all profiles and remove access to the previous EDA app. Finally, verify access to tabs for all profiles, especially System Administrator.
- If you started with EDA 1.114 or later using the installer, you already have the Education Data Architecture app and the Education Cloud Settings tab. You just need to verify tab access for all profiles requiring it as described in this article.

Note

If you're using a custom Lightning app instead of the EDA app, enable the Education Cloud Settings tab for that app.

Before You Begin

These changes affect how your users access EDA. Be sure to notify them before implementing them in your production org so they understand how to access EDA. Also be sure that My Domain is enabled in your org by going to Setup, then searching for and selecting **My Domain**. You won't be able to access Education Cloud Settings if it's not. To learn more, see My Domain in Salesforce Help.

Grant Apex Class Access

To access the Education Cloud Settings tab, users require access to certain EDA Apex classes. Depending on the EDA version that you started with, the System Administrator profile sometimes already has access, but we recommend verifying access for all profiles that need them, and for permission sets as needed. For a list of the Apex classes, see Enable EDA Apex Class Access.

Create the Education Data Architecture Lightning App

You can only access the Education Cloud Settings tab from a Lightning app, but the EDA app released before version 1.114 was a Classic app. If you started with EDA before 1.114, create the Education Data Architecture Lightning app.

1. From Setup, search for and then select **App Manager.**
2. Click **New Lightning App**.
3. For App Name, enter `Education Data Architecture` and press Tab to automatically populate Developer Name with `Education_Data_Architecture`. Then, click **Next**.
4. Accept the Standard navigation style and Desktop and phone form factors. Don't specify any Utility Items. Then, click **Next**.
5. Specify the items you want to display as tabs in the Education Data Architecture app. Include Home, Accounts, Contacts, Courses, Terms, Course Offerings, Program Plans, Trigger Handlers, and Education Cloud Settings.
6. Click **Next**.
7. Specify profile access to the app. Start by granting access only to the System Administrator profile, so you can verify that the app is working before you make it available to more users.
8. Save your changes.

> **Note**
> As you configure the Education Data Architecture app, make sure that the access you provide to the new app matches what you provided for the earlier EDA app.

Grant Education Data Architecture App Access

After verifying that your Education Data Architecture Lightning app works as desired, add users to it.

1. From Setup, search for and select **App Manager**.
2. Click the action menu for Education Data Architecture and select **Edit**.
3. On the User Profiles page, add required profiles to Selected Profiles.
4. Save your changes.

Note
To make the EDA app a user's default app, specify it in the Custom App Settings of the desired profile.

Remove EDA App Access

Hide EDA, the Classic managed app that pre-dates the Education Data Architecture Lightning app released in EDA 1.114, in the App Launcher.

1. From Setup, search for and select **App Manager**.
2. Click the action menu for EDA and select **Edit**.
3. In Assign to Profiles, deselect Visible for all profiles.
4. Save your changes.

Verify Tab Access

If you started with a version of EDA 1.114 or earlier using the installer, verify that all profiles have access to the tabs that they need.

Note
The steps to verify tab access depend on whether you've enabled the Enhanced User Profile Interface in the User Management Settings. For details, see Enable the Enhanced Profile User Interface in Salesforce Help.

If you've disabled Enhanced User Profile Interface:

1. From Setup, search for and select **Profiles**.
2. Click a profile name, such as **System Administrator**.
3. Click **Edit**.
4. In Custom Tab Settings, verify the settings for the selected profile. For example, for the System Administrator profile, verify that Education Cloud Settings is set to **Default On** and that EDA Settings is set to **Hidden**.
5. Save your changes.

If you've enabled Enhanced User Profile Interface:

1. From Setup, search for and select **Profiles**.
2. Click a profile name, such as **System Administrator**.
3. Click **Object Settings**.

4. Click **Education Cloud Settings**, and then click **Edit**.
5. Under Tab Settings, select **Default On** and save your changes.
6. Click **Object Settings**.
7. Click **EDA Settings**, and then click **Edit**.
8. Under EDA Settings, select **Tab Hidden** and save your changes.

Configure Account Model Settings

In EDA Settings, configure the settings that control your primary account model, including the Account record types used for Administrative and Household Accounts.

Settings for Managing Your Account Model

The type of container Account associated with a Contact–either Administrative or Household–is controlled by these org-wide settings in EDA Settings.

Setting	Default Value
Default Account Model	Administrative
Administrative Account Record Type	Administrative
Household Account Record Type	Household

When you've decided on your preferred, primary account model, verify all of these settings so that the correct kinds of container Accounts are created for Contacts. Keep in mind these guidelines.

- For many orgs, the default values are fine as they are.
- For orgs choosing a primary account model different from the out-of-the-box default value (Household when the default is Administrative), change the value in Default Account Model.
- For orgs that have custom record types for Administrative or Household Accounts, specify those custom values in these settings. For example, if you have a custom Administrative Account record type called Student Account, change Administrative Account Record Type to Student Account. If your preferred, primary account model is Administrative, also change Default Account Model to Student Account.

Note

Even though you can have only one preferred, primary account model, it's fine to have a mix of Contacts in your org–some with Administrative Accounts and some with Household Accounts. When creating Contact records, follow the workflow that creates the appropriate type of container Account. Refer to details in Contact.

Verify or Change the Default Account Model

The Default Account Model setting specifies your preferred, primary account model. Between Administrative and Household, you must pick a favourite. Out of the box, Administrative is the default value. In other words, whenever you create a new, independent Contact, an Administrative Account is created automatically as the Contact's container Account.

Verify that the current setting matches your intended configuration. If you have a custom Account record type for your preferred, primary account model, specify that custom record type as the Default Account Model. Changes apply only to Accounts created after the change, not existing Accounts.

1. On the Education Cloud Settings tab, in Education Data Architecture, click **Settings**.

   > **Note**
   > If you don't see the Education Cloud Settings tab, access it from App Launcher. For details, see Education Cloud Settings.

2. In EDA Settings, select **Account Model** and verify the Default Account Model setting.
3. To change from Administrative to Household Account or vice versa, or change to a custom record type:
   a. Click **Edit**.
   b. Select a valid value for container Accounts. Educational Institution or Business Organisation aren't valid record types for container Accounts.
   c. Save your changes.

Verify or Change the Record Types Used for Administrative and Household Accounts

The Administrative Account Record Type and Household Account Record Type settings must specify values that are different from each other to ensure data integrity. Verify the current settings for both. If you're using a custom Account record type instead of the default Administrative or Household Account record type, then change the corresponding Account record type setting. Changes apply only to Accounts created after the change, not to existing Accounts.

1. In EDA Settings, select **Account Model**.

1. In EDA Settings, select **Account Model**.

2. Verify the values selected in Administrative Account Record Type and Household Account Record Type. Make sure that they each specify a unique record type.

3. To change either setting to a custom record type:
   a. Click **Edit**.
   b. Select the custom record type.
   c. Save your changes.

For details about creating custom Account record types, refer to Account.

Things to Know About Container Versus Parent Accounts

We recommend using container Accounts for all the Contacts at an institution–students, faculty, and staff. In limited cases however, if data management needs for faculty and staff are simple and low volume, it's possible to use parent Accounts for these Contacts instead of container Accounts. The parent Account is typically the one that best represents a Contact's primary function. For example, the Account representing the Maths Department could be the parent Account for each of the school's maths teacher Contacts.

If you go this route, avoid overloading parent Accounts with too many child Contacts. Let's consider the data volume implications of these sample approaches.

- If the Maths Department is the parent Account to a dozen teachers: As the years pass and teachers come and go, the Account's child records increase in number, eventually growing to hundreds of Contacts before the school archives older records.
- If the school's top-level Educational institution Account record is the parent Account to all faculty and staff: As the years pass, the Account's child records could eventually grow to number in the thousands before the school archives older records.

In either case, with these kinds of data volumes, changing ownership or sharing for just one record can involve thousands of calculations to update records throughout the data hierarchy. All these calculations take time and can cause performance issues.

For extra credit: If you're wondering why it's non-negotiable that a Contact have either a container or parent Account, the Salesforce security model is the reason. A Contact without a parent Account is considered private, which means the Contact record is visible only to the person who created or owns the record and to admin-level users. It can't be shared with other users who have a legitimate business need to access the Contact's data, and this limitation can lead to data quality issues. For example, if a Contact record exists but isn't visible to one of those users, the user could create a duplicate record without realising it's a duplicate.

Customise Administrative and Household Account Names

Learn about, manage, and update Account names in EDA.

Overview: Account Naming

EDA automatically generates Administrative Account and Household Account names for you based on the names of Contacts associated with an Account. For example, when you create the Mary Jefferson Contact record, EDA creates the Jefferson Administrative Account or the Jefferson Household for you at the same time (depending on the record type you've specified for Accounts).

By default, Administrative Account and Household Account names are based on a Contact's last name. For each type of Account, you can choose a different preset naming format or choose the Other option and create your own custom format. For example:

- Instead of `Jefferson Administrative Account`, show `Mary Jefferson Administrative Account`.
- Instead of `Jefferson Household`, show `Mary Jefferson Family`.

See Configure Leads Settings for special considerations that impact the naming of Accounts that are created when you convert a Lead to a Contact.

The rest of this article describes how to customise automatic Account naming.

Customise the Administrative Account Name Format

Automatic Account naming is enabled by default for Administrative Accounts and can't be disabled. Administrative Account names are automatically updated whenever the Contact's last name changes.

> **Note**
> Administrative Accounts typically have only one related Contact. If an Administrative Account happens to have more than one Contact, automatic naming uses the name of the primary Contact.

If you want to change the Administrative Account Name Format from the default option of *{!Last Name}* Administrative Account, feel free to do so.

1. On the Education Cloud Settings tab, in Education Data Architecture, click **Settings**.
   If you don’t see the Education Cloud Settings tab, access it from App Launcher or see Education Cloud Settings.
2. In EDA Settings, select **Account Model**.
3. Click **Edit**.

4. From Administrative Account Name Format, select a format.
    - **{!Last Name} Administrative Account**–Generates a name such as `Smith Administrative Account`.
    - **{!{!FirstName}} {!Last Name} Administrative Account**–Generates a name such as `John Smith Administrative Account`.
    - **{!LastName} ({!{!FirstName}}) Administrative Account**–Generates a name such as `Smith (John) Administrative Account`.
    - **Other**–Specify your own naming convention.
5. Save your changes.

Changing the default name format affects the naming of new Administrative Accounts and Accounts for Contacts whose last name changes. It doesn't update the format of existing, unchanged Administrative Account names. For instructions on how to update all Administrative Account names to use the format you specify, see Update All Administrative or Household Account Names.

Customise the Household Account Name Format

You have many options for changing the Household Account Name Format from the default option of {!Last Name} Household.

1. In EDA Settings, select **Account Model** and then click **Edit**.
2. From Household Account Name Format, select a format.
    - **{!LastName} Household**–Generates a name such as `Smith Household` or `Jones and Smith Household`, depending on the number of Contacts in the Household.
    - **{!{!FirstName}} {!LastName} Household**–Generates a name such as `John Smith Household` or `Jane and John Smith Household`.
    - **{!LastName} ({!{!FirstName}}) Household**–Generates a name such as `Smith (John) Household`, `Smith (Jane and John) Household`, or `Doe (Jane) and Smith (John) and Household`.
    - **{!LastName} Family**–Generates a name such as `Smith Family` or `Jones and Smith Family`.
    - **{!{!FirstName}} {!LastName} Family**–Generates a name such as `John Smith Family` or `Jane and John Smith Family`.
    - **{!LastName} ({!{!FirstName}}) Family**–Generates a name such as `Smith (John) Family`, `Smith (Jane and John) Family`, or `Doe (Jane) Family and Smith (John)`.
    - **Other**–Specify your own naming convention.

3. Save your changes.

Changing the default name format affects the naming format of new Household Accounts and Accounts whose last name changes. It doesn't update the format of existing Household Account names. For example, if you change from *{!LastName}* Household to *{!{!FirstName}} {!LastName}* Household, an existing Account named `Jefferson Household` is not updated to `Mary Jefferson Household`. However, if Mary's last name changes to `Jefferson-Soto`, the Account naming format becomes `Mary Jefferson-Soto Household`.

For instructions on how to update all Household Account names to use the format you specify, see Update All Administrative or Household Account Names.

> **Note**
> Customisations such as specifying the number of Contacts listed or the order of their names aren't supported.

Turn On Automatic Household Renaming

When you're using the Household Account model, Household Accounts are named automatically when you create a Contact who isn't already associated with a household. Specify the naming convention to use in Automatically Rename Household Accounts from Account Model in EDA Settings.

- Turn on Automatically Rename Household Accounts to rename a Household Account whenever a new Contact is added to the Household or an existing Contact is renamed, deleted, or moved to another household.
- Turn off Automatically Rename Household Accounts to prevent Household Accounts from being renamed when a Contact in a household changes names or membership.

  > **Note**
  > If you turn off Automatically Rename Household Accounts but then run Update All Household Accounts, the setting is automatically enabled after the page refreshes.

Update All Administrative or Household Account Names

If you update the format used for Administrative or Household Account names and you want all existing Administrative or Household Account records to use the new format, run the Update Administrative Account Names or Update Household Account Names Apex job from System Tools in EDA Settings. These settings work only if the ACCT_IndividualAccounts_TDTM trigger is enabled.

> **Important**
> If you have any automated processes that reference Administrative or Household Accounts (for example, workflow rules), disable them before you run either of the Update All Account Names jobs. After the job completes, restore your automation.

- Update All Administrative Account Names–Update Administrative Account names using the only Contact associated with the Account. For example, in an Account where John Smith is the primary Contact, changing the Administrative Account Name Format from *{!Last Name}* to *{!{!FirstName}} {!LastName}* and clicking Refresh All updates the Account name from `Smith Administrative Account` to `John Smith Administrative Account`.

  > **Note**
  > Administrative Account renaming works only when an Account's Primary Contact is related to the Administrative Account. If the Primary Contact is not related to the Account, the Account isn't renamed.

- Update All Household Account Names–Update Household Account names using ***all*** Contacts associated with a Household Account. This feature enables Automatically Rename Household Accounts even if it was previously disabled.

  > **Tip**
  > If your Household Accounts have multiple associated Contacts, avoid formats that include first names unless you want all Contacts' names in your Account names. For example, in the `Smith Household`, which has two adults and three children, changing from *{!Last Name}* to *{!{!FirstName}} {!LastName}*, creates an Account named `Jane, Jackie, John, Joseph, and Samuel Smith Household`.

Guidelines for Custom Name Formats

If you use Other for an Account name format, follow these guidelines to construct a valid format.

Construct Custom Name Formats

If you've specified Other for an Account name format, follow these guidelines to construct a valid format.

- If including a Contact field, use *{!fieldname}*, where fieldname is the full developer name of a field on a Contact record. The field name must be of type Lookup, Text, TextArea, or Picklist.
- Make sure that your Contact records have values specified for people's names. For example, a blank FirstName field for a Contact can result in a malformed Account name.
- If using *{!FirstName}*, surround the field with an additional *{! }*. For example:

  {!Salutation} {!{!FirstName}} {!LastName}

  This syntax specifies which fields to use from Contacts that have the same LastName.

Include Fields in Custom Name Formats

You can include any standard Contact field (except MiddleName) in the custom name (Other) format for both Administrative and Household Accounts.

> **Note**
> To enable MiddleName and Suffix, go to **Setup** > **User Interface** and in Name Settings enable each setting for Person Names.

Format the field as *{!fieldname}*. For example:

Format the field as *{!fieldname}*. For example:

{!LastName}, {!{!FirstName}}

Field names are case insensitive.

EDA supports these custom fields: Mailing_County__c, Other_County__c, Deceased__c, and Exclude_from_Household_Name__c.

Specify Account Name Formats in Custom Settings

If you specify a custom naming format using the Other option, we recommend that you specify the format using the naming settings in EDA Settings. Although not recommended, you can alternatively specify it from Setup, in Custom Settings, using a combination of fields.

- Admin Account Naming Format and Admin Other Name Setting
- Household Account Naming Format and Household Other Name Setting

If you do use Custom Settings, use extra caution when entering values in these fields. Make sure to enter *Other* in the Naming Format field and also enter the custom name format in the Other Name Setting field. For example, you must enter *Other* in Admin Account Naming Format and a value such as *{!LastName} Admin* in Admin Other Name Setting. If you specify it incorrectly, for example, you enter *{!LastName} Admin* in Admin Account

Naming Format, and leave the Admin Other Name Setting blank, Administrative Account names sometimes display improperly when you view these fields in EDA Settings.

Configure Contacts' Email Addresses and Phone Numbers

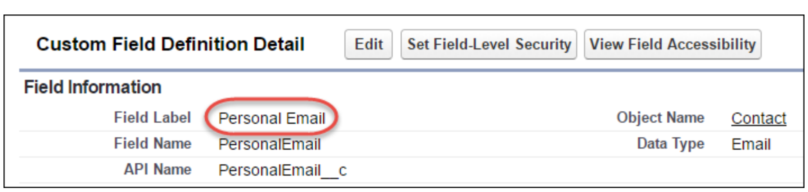
Manage email and phone settings for Contacts in EDA.

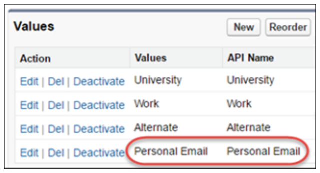
Email Address and Phone Fields—Preconfigured and Custom Options

EDA provides preconfigured email fields and phone fields to track a Contact's email addresses and phone numbers.

- Email fields
  - University Email
  - Work Email
  - Alternate Email
  - Preferred Email—Designates which field is the Contact's preferred address for communications
- Phone fields
  - Home Phone
  - Work Phone
  - Mobile
  - Other Phone
  - Preferred Phone—Designates which field is the Contact's preferred phone number for communications

If you need to track additional data, you can augment these fields with your own custom fields by adding your custom field's Field Label to the Preferred Email field or Preferred Phone field as a picklist value. Also make sure that the picklist value's label and API name match exactly. Any mismatches can cause errors when saving a custom email or phone as the Contact's Preferred Email or Preferred Phone.





Values

Action	Values	API Name
Edit | Del | Deactivate	University	University
Edit | Del | Deactivate	Work	Work
Edit | Del | Deactivate	Alternate	Alternate
Edit | Del | Deactivate	Personal Email	Personal Email

For more information about creating custom fields and picklist values. See Add Custom Fields and Picklist Values.

How Email and Phone Fields Interact with Standard Contact Fields

Because the standard EDA email and phone fields give you finely grained control over managing Contacts' data, the standard Email and Phone fields don't show on EDA page layouts.

Just because they're hidden, though, doesn't mean that they're not important. You might be using those fields, and the Salesforce platform still relies on them for emailing or calling Contacts. When you install EDA , here's how we keep all the email addresses and phone numbers in sync.

- If a Contact's standard Email or Phone field has a value and custom fields (if any) don't have values, EDA copies the value from the standard field to the Alternate field and sets the Preferred Email to Alternate or sets the Preferred Phone to Other.

  > **Note**
  > If you've overridden the label of the Alternate email field in the Translation Workbench (for example, changed it to Personal Email), make sure that you also update its corresponding picklist value in the Preferred Email field on Contact. Remember to update both the picklist value label (Personal Email) and the API name (Personal Email) for your newly named Personal Email field, and make sure they match exactly.

- If a Contact's standard Email or Phone field has a value and one or more custom email or phone fields also have values, EDA sets the Preferred Email or Preferred Phone field to the standard setting.
- If a Contact's standard Phone field has no value and one or more custom phone fields *do* have values, you can select a field for Preferred Phone. In EDA Settings, under **People and Groups** > **Contact Information**, select a value from the Default Preferred Phone picklist.
- If a Contact has a single email or phone value in a field other than standard Email or standard Phone, EDA sets that field as the Preferred Email or Preferred Phone and copies the value to the standard field.

- If a Contact's standard Email or Phone field is blank and other email or phone fields are also blank, EDA leaves Email or Phone blank. Whenever you add one or more email addresses or phone numbers to a Contact, the Preferred field is required–you must select one of the fields (preconfigured or custom) that has a value. EDA then takes your selected Preferred Email or Preferred Phone and copies it to the standard field.

For information about the preconfigured phone fields and other settings, see Configure Preferred Email and Phone Settings.

Configure Preferred Email and Phone Settings

By default, all Contacts must have a Preferred Email and Preferred Phone, but you can change the defaults in EDA Settings from Contact Information under People and Groups.

Enable Preferred Email or Preferred Phone for the First Time

If your org doesn't currently require Contacts to have a Preferred Email or Preferred Phone and you start requiring them, after enabling the requirement, run the Preferred Email and Preferred Phone Apex job from System Tools under System in EDA Settings. The job:

- Ensures that a standard or custom email address or phone number is set as a Contact's Preferred value.
- Ensures that when a Contact has only standard Email Address or Phone Number records, those values are copied to the Alternate email or Other phone field and the Preferred Email is set to Alternate or the Preferred Phone is set to Other.

This Apex job works only if:

- Enhanced Preferred Phone Functionality is selected
- Require Preferred Phone is not selected
- The CON_PreferredPhone_TDTM trigger handler is enabled

Update Preferred Email and Phone Field Names and Picklist Values

If you started using EDA before version 1.89 and Preferred Phone and Preferred Email are enabled in your org, your preconfigured Preferred Email and Preferred Phone picklist values won't match the updated versions. In this case, if you want to match your pre-1.89 field labels to the updated versions (for example, to fix failing unit tests or to use translations), add these new picklist values to the Preferred Phone and Preferred Email fields on Contact. If you're not sure which version of EDA you started with, see Find the Release Version.

Pre-1.89 Preferred Email Picklist Name	New Picklist Name
University	University Email

Work	Work Email
Alternate	Alternate Email

Pre-1.89 Preferred Phone Picklist Name	New Picklist Name
Home	Home Phone
Work	Work Phone
Mobile	Mobile Phone
Other	Other Phone

See Add Custom Fields and Picklist Values.

Change Default Syncing Rules

If the default syncing rules aren't compatible with your existing integrations or other business processes, you can change them from Contact Information under People and Groups in EDA Settings.

- To use the Enhanced Preferred Phone Functionality to validate that the field selected for Default Preferred Phone has a value, but to remove the requirement for a Contact to have a Preferred Phone, turn on Enhanced Preferred Phone Functionality and turn off Require Preferred Phone.
- To choose which Phone field syncs with Preferred Phone when the standard Phone field has no value or when more than one Phone field has values, choose from the Default Preferred Phone picklist.

Tip
To preserve the values stored in a Contact's standard fields, enable field history tracking for Contacts and specify tracking for those fields.

With the initial release of the Preferred Phone functionality in version 1.82, we also introduced the CON_PreferredPhone_TDTM trigger handler, which ensures that the value in the Preferred Phone field is always synced to the standard Phone field. CON_PreferredPhone_TDTM is enabled by default.

While you can manage the Preferred Phone functionality by disabling this trigger handler, we strongly recommend that you manage Preferred Phone from EDA Settings, instead. Using the Enhanced Preferred Phone Functionality setting ensures that the trigger handler receives future updates, which won't happen if you specify that the trigger handler is user managed.

Configure Translation for Preferred Phone or Preferred Email Picklist Values

If you started using EDA with version 1.89 or later, and Preferred Phone and Preferred Email are enabled in your org, and your Contact page layouts use only the preconfigured Phone and Email fields, then no changes are needed to translate Preferred Phone and Preferred Email picklist values in the languages supported by EDA.

However, if either of the following conditions exist, make the following changes to translate Preferred Phone and Preferred Email picklist values correctly.

- If you started using EDA before version 1.89 and Preferred Phone and Preferred Email are enabled in your org, update your Preferred Phone and Preferred Email fields and picklist values as described in Update Preferred Email and Phone Field Names and Picklist Values, then configure translation as follows.
- Regardless of when you started using EDA, if Preferred Phone and Preferred Email are enabled in your org and your Contact page layouts use any fields other than the preconfigured fields (you use custom fields or fields that aren't listed in Configure Contacts' Email Addresses and Phone Numbers), configure translation for Preferred Phone and Preferred Email picklist values as follows.

1. Click , then click **Setup**.
2. Search for then select **Translation Workbench | Translation Language Settings** and ensure the chosen language is active. If you need to add a language, do so now.
3. In Translation Workbench, select **Translate**.
    1. Specify the Language you're translating to (in our example, ***Spanish***).
    2. From Setup Component, select **Picklist Value**.
    3. From Object, specify **Contact**.
4. From the page layout that contains the non-standard field in the language to be translated to (in our example, ***Spanish***), copy the label of the field (***Teléfono del ayudante***).

5. In Translation Workbench, under Picklist Value Label Translation, paste the label of the field and click **Save**.

Preferred Phone	
Asst. Phone	Teléfono del ayudante
Home Phone	Teléfono particular
Mobile Phone	Teléfono móvil
Other Phone	Otro teléfono
Work Phone	Teléfono laboral

6. If you created new fields and picklist values as described in Update Preferred Email and Phone Field Names and Picklist Values, repeat these steps for each new field you created.

See Also:

- EDA and Translation
- Find the Release Version

Understand Addresses in EDA

Learn how addresses are tracked and stored in EDA.

Introduction

Students are nomadic. They live in a residence hall one year, off-campus the next. They study abroad for a term. They go home for the summer–or not. In short: They have lots of addresses.

So do faculty, staff, and administrators–work and home addresses, each, at a minimum. Even academic departments and programs sometimes have addresses that need to be stored and managed in Education Data Architecture (EDA).

Fortunately, EDA offers robust address management that allows you to:

- Track and manage multiple addresses for students and other Contacts using the Household Account model.
- Keep multiple addresses for a student synchronised on related Contact, Household Account, and Address records.
- Differentiate addresses among the Contacts in a Household–for example, have one mailing address for the student and a different mailing address for the student's parent or guardian.

- Maintain one or more addresses for students and other Contacts using the Administrative Account model, as well as for institutional and organisational Accounts such as Academic Programs and University Departments.

EDA's address management functionality is powerful—and potentially confusing. This article covers in detail:

- How to turn multiple addresses on and off in your org
- Where EDA stores address data
- How to use multiple addresses for student Contacts with Household Accounts
- How to manage addresses for other types of Accounts
- Storage considerations for using multiple addresses
- Next steps for configuring and managing addresses in your org

So pour yourself a cup of coffee and get comfortable while you learn all about addresses in EDA.

Manage Multiple Addresses in Your Org

Contacts and Accounts in EDA can have one or more addresses.

Multiple addresses are on by default for Household Accounts and they can't be turned off. They're also on for:

- Contacts
- Administrative Accounts
- Business Organisation Accounts

They're off by default for all other Account types, but you can change nearly all of the defaults in EDA Settings.

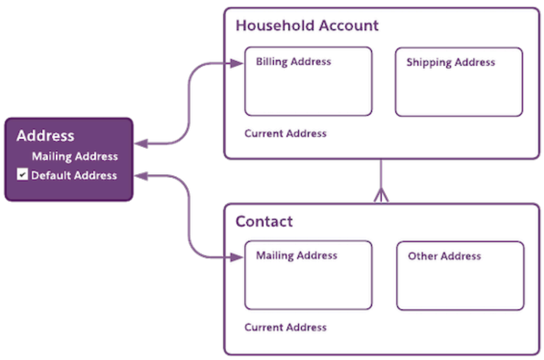
You'll find instructions on how to change the defaults in the article Configure Address Settings, but before you change anything, keep reading to make sure you understand the implications of using multiple addresses in each context.

Understand Where EDA Stores Address Data

When you maintain only one address per Contact or Account, EDA stores the address data on the Contact or Account record. That part is straightforward. When you use multiple addresses, however, EDA uses a third object: Address.

Let's dive deep into the data that Address, Contact, and Account records store, and how the objects relate, when you track multiple addresses for student Contacts with a Household Account. This scenario is probably the most complex—and most common—reason for using multiple addresses, so EDA provides some specialised synchronisation to keep the data in sync, while preserving flexibility for seasonal and other address variations.

> **Note**
> Read this section even if you're not using Household Accounts as a container Account. It provides a foundation for understanding multiple addresses on Administrative Accounts and other Account record types.



Address

Address is a custom EDA object that stores address and address seasonality information. Each Address record looks up to an Account record ***or*** a Contact record, however, EDA synchronises address data on the Address record with both the related Contact and Household Account records.

Each Address record is one of these types: Home, Work, Vacation Residence, or Other. These types come out of the box with EDA; you can create others.

Address records also contain a Default Address checkbox. The Default Address is the current, active address on the related Contact and Household Account records–the one where you send postal mail. Only one Address record can be the Default Address for all related Contact and Household Account records.

Finally, Address records contain fields that let you define a date range, or season, for when the address is in effect. You can see the last time an Address record was used by its Latest Start Date and Latest End Date fields.

Contact

Every Contact record can store two addresses: a Mailing Address and an Other Address. Both are custom compound fields.

- Mailing Address includes Mailing Street, Mailing City, Mailing State/Province, and other component "mailing" fields.

- Other Address includes Other Street, Other City, Other State/Province, and so on.

As with Address records, each Contact address has a type: Home, Work, Vacation Residence, or Other.

EDA syncs the Contact's Mailing Address with its related Address record and with the Billing Address on its related Household Account record. After the initial sync, EDA continues to treat the Contact's Mailing Address as the source of truth, and the Address record ID shows in the Contact record's Current Address field. The value of the Current Address changes depending on which Address record is marked as Default Address and whether dates for a seasonal address are in effect.

The Current Address field on the Contact record looks up to the related Address record that stores the Mailing Address for the Contact.

Under certain conditions, EDA also syncs the Contact's Other Address to the Household Account record—but just once. (Don't worry. We explain what EDA synchronises, and when, in just a minute.)

Finally, Contact records include a Do Not Automatically Update checkbox. This field allows you to maintain a separate mailing address for that Household Contact. For example, select Do Not Automatically Update on the parent or guardian Contact record within a student's household. That way, when the student moves out of the residence hall and you update their mailing address, the Mailing Address on their parent's Contact record isn't affected.

Account

Account is a standard Salesforce object design for CRM, so its address fields are named for a business audience. Every Account record can store two addresses: a Billing Address and a Shipping Address.

As with Mailing Address and Other Address on a Contact record, Billing Address and Shipping Address are custom compound fields. However, unlike the addresses on Address and Contact, neither Billing Address nor Shipping Address has a type.

EDA syncs the Household Account's Billing Address with its related Address record and with the Mailing Address on its related Contact record.

The Shipping Address is synced once, from the related Contact's Other Address if and when you create a Contact record that contains an Other Address.

Household Account records also have the Current Address field, which looks up to the Address object and shows you the Address record ID for the Billing Address.

That's how Address, Contact, and Household Accounts relate in the abstract. Now let's learn how they work in practice.

Use Multiple Addresses for Contacts with Household Accounts

Set up Contacts with multiple addresses, such as for seasonal residences, by using Household Accounts.

Create a New Contact Record

Whenever you create a new independent Contact–meaning a Contact that isn't under an existing Household Account–always start from the Contact record when filling in the address. Contact records store more complete data about the individual than the Household Account record. And, importantly, saving the new Contact automatically creates related and synced Household Account and Address records so that your baseline data is accurate from the beginning.

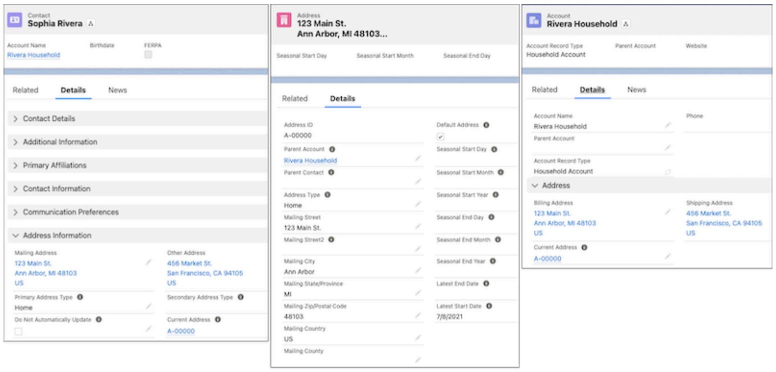
The inverse isn't true: Saving a new Household Account doesn't automatically create related Contact and Address records.

> **Note**
> This scenario presumes your default Account model is Household. For details, see Contact.

When you create a new Contact record with the Account Name field blank and one or more of the address fields populated, EDA :

- Creates a related Household Account record and syncs the Contact's Mailing Address to the Account's Billing Address. If provided, it also syncs the Contact's Other Address to the Account's Shipping Address. This is the only time that EDA syncs the Contact's Other Address to the Household Account's Shipping Address.
- Creates a related Address record and syncs the Contact's Mailing Address to the mailing address fields on the Address record. It also assigns the Primary Address Type from the Contact record to the Address Type on the Address record, and automatically selects the Default Address checkbox. If no Primary Address Type is specified, EDA defaults to Home.
- Makes the Contact's Mailing Address the Current Address.

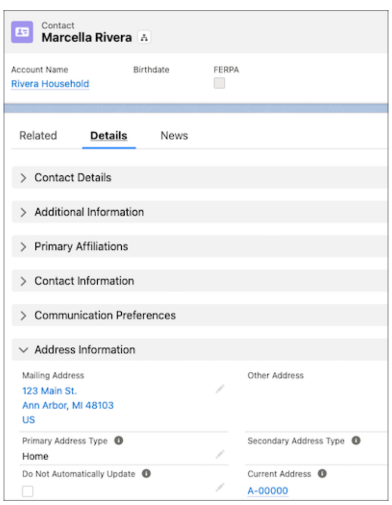
Voila! The addresses are synchronised on all three records, and the Contact's Mailing Address becomes the Default Address and the Current Address.



Add a New Contact to an Existing Household

When you add a new household member (Contact) to a Household Account, EDA :

- Automatically populates the new Contact's Mailing Address with the Household Account's address.
- Relates the Household's existing Address record to the new Contact's Mailing Address.
- Applies the Address Type on the existing Address record for the Household to the new Contact's Mailing Address.



If you choose to enter a Mailing Address for the new Contact because their address is now the current, primary address for the Household Account, EDA :

- Creates a new Address record for the new mailing address.
- Makes the new Address record the default for the Household Account and for all of the household's Contacts (unless any Contact has Do Not Automatically Update selected).

Note
There's one circumstance in which EDA ignores the Do Not Automatically Update field. When creating a new household Contact, if you leave the Mailing Address fields blank and you select Do Not Automatically Update, EDA disregards the selection and instead populates the Contact's Mailing Address with the Household Account's Billing Address. Do Not Automatically Update is selected on the new Contact record, however, and is in effect for subsequent updates.

Update an Address When a Household Member Moves

When the student or someone in their household moves, addresses need to reflect the change. By default, EDA keeps the Billing Address on the Household Account synchronised with the Mailing Address on all of the household's Contacts—unless any Contact record has Do Not Automatically Update selected. When Do Not Automatically Update is selected, that Contact's mailing address is not synced with the Household Account's address change.

You can update the address for everyone under a Household Account in any of these ways.

- (Recommended) Create a new Address record from the Addresses related list on the Account and set it as the Default Address.
- Edit the Billing Address on the Account record.
- Edit the Mailing Address on any of the household's Contact records.

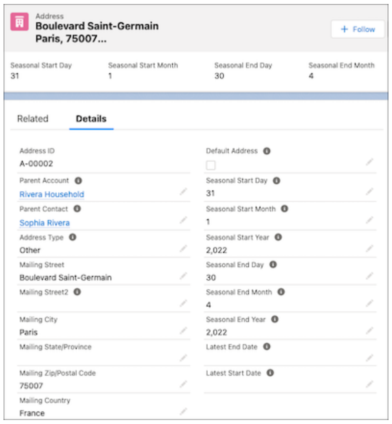
When you do so, EDA :

- Creates a new Address record and sets it as the Default Address.
- Updates the Billing Address on the Household Account and the Mailing Address on all of the household's Contacts with the new address (except for Contacts who have Do Not Automatically Update selected).

See Create Address Records.

Create a Seasonal Address

The seasonal fields on Address records allow you to automatically make the address current for a specified period of time. Say student Sophia is going to spend a term in Paris (lucky Sophia). Create an Address record for her Left Bank residence and use the seasonal fields to indicate when the address is in effect—that is, when it's the Current Address on Sophia's Contact and Account records.



In this example, Boulevard Saint-Germain is Sophia's address from February 1 to April 30, 2022.

EDA processes seasonal address updates as part of overnight scheduled jobs on the seasonal start date. If you want the address to go into effect on February 1, for example, specify a start date of January 31. However, if the start date is the current date or in the past, the seasonal address takes effect right away.

When a seasonal address is in effect, it becomes the Current Address on the related Contact and Account records–in other words, the seasonal Address record syncs to the Contact and Account records and becomes the current Contact Mailing Address and the current Account Billing Address.

After the seasonal end date, either another seasonal address takes its place, or the Address record marked as Default Address is restored as the Current Address for the related Account and Contact records.

Of course, unless Sophia's whole family is going with her to Paris, be sure you mark the Contact records for the other members of her household as Do Not Automatically Update.

Considerations for Using Multiple Addresses with Household Accounts

We like to think of Address, Contact, and Account as a three-legged stool: EDA can synchronise multiple Household Account addresses across all three objects, and when it does, the data is just as you expect it to be and the stool is balanced and stable. But it's easy to make the stool wobble: You update or add an address, and you don't see the change propagated on a related record.

Here are a few more things to know about multiple address management for Household Accounts that can help prevent unwanted surprises, unexpected results, and an annoyingly unsteady stool.

- Household Accounts always have multiple addresses enabled in EDA . They can't be turned off, and they're in effect even if you turn off multiple addresses for Contacts. Be aware that Household Account appears in EDA Address Settings to be not enabled for multiple addresses, even though it is.
- By default, Address records created from the Addresses related list on the Contact page aren't synchronised with the related Household Account. You must manually select the Parent Account when you create the Address record. As a result, we recommend always creating additional addresses for a Household Account from the Addresses related list on the Account, not from the related list on a member Contact. EDA automatically synchronises additional addresses from the Household Account to the Contact.
- Don't rely on the Addresses related list on the Contact page for an accurate list of all related Address records. It doesn't show addresses created from the related Household Account page. For example, when you create additional Contacts for a Household Account from the Contacts related list on the Account record, you can see the Address record in the Household Account's Addresses related list, but not in the new Contact's Addresses related list.
- When you need to edit an address (as opposed to creating a new address), always edit the Address record rather than editing the related Contact's Mailing Address or Account's Billing Address. Editing the Address record itself ensures that the data is synchronised to both the Contact and the Account. See Edit Addresses.
- You can mark Address records as inactive when they shouldn't be used. For details, see Mark an Address as Inactive.

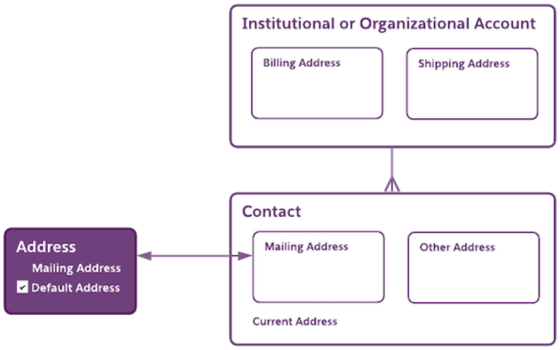
Manage Multiple Addresses for Other Types of Accounts

While EDA allows multiple addresses for Administrative, institutional, and organisational Accounts, it doesn't synchronise them the way it does for Household Accounts.

Create a New Contact Record for a Non-Household Account

When you use multiple addresses on non-Household Accounts and you first create a new Contact record with the Account Name field empty and the address data populated, EDA :

- Creates a related Address record and syncs the Contact's Mailing Address to the Address record.
- Assigns the Primary Address Type from the Contact record to the Address Type on the Address record. If no Primary Address Type is specified, EDA defaults to Home.
- Selects the Default Address checkbox on the Address record.
- Makes the Contact's Mailing Address the Current Address.
- Creates a related Account record whose address fields are empty.



If you want the Contact's Mailing Address to be the related Account's Billing Address, manually fill in the Account's Billing Address fields. Even though the addresses are the same, they don't share an Address record and they aren't synchronised. If you update either address, manually update the other to keep them in sync.

> **Note**
> It's possible to specify the Address record created from the new Contact in the related Account's Current Address field. However, doing so merely attaches the Address record to the Account. The Billing Address doesn't update (synchronise) with the mailing address on the Address record.

Create a New Non-Household Account

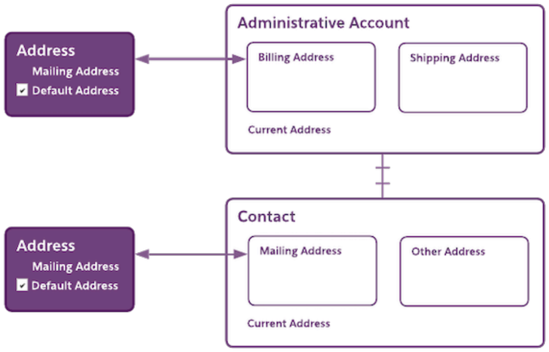
When you use multiple addresses on non-Household Accounts and you first create a new Account record with a Billing Address, EDA :

- Creates a related Address record and syncs the Billing Address to the mailing address on the Address record.
- Selects the Default Address checkbox on the Address record.
- Makes the Account's Billing Address the Current Address.

Then, when you create a Contact under this Account, EDA populates the Contact's Mailing Address with the Account's Billing Address, but it creates a new Address record even though the addresses are the same. The Account's Billing Address and the Contact's Mailing Address don't share an Address record and aren't synchronised. If you update either address, manually update the other to keep them in sync.

Address Updates to Non-Household Accounts

Additional addresses created for non-Household Accounts or their Contacts aren't synchronised.



The new Address record is always related to the Contact or the Account record that you start from. When you create the Address, you can manually specify the Parent Contact (when you start from an Account) or Parent Account (when you start from a Contact) to also relate the new Address record to that record. But the Address record is only related, not synchronised: Setting it as the Current Address or Default Address doesn't update the Contact's Mailing Address (if you started from an Account) or the Account's Billing Address (if you started from a Contact).

When you need to edit an address for a Contact or a non-Household Account, you can edit the Address record or the address fields on the Contact or Account record. Edits made to the Contact's Mailing Address or the Account's Billing Address are synced with the Address record, and vice versa. Just remember that the edits don't also sync with the related Contact's address (if you edit the Account's address) or the related Account's address (if you edit the Contact's address).

Finally, you can specify additional seasonal addresses for non-Household Accounts.

See Create Address Records and Edit Addresses.

Manage Addresses When Multiple Addresses Are Off

If you're not using multiple addresses on Administrative or organisational Accounts, or their Contacts, simply update addresses directly on the Contact or Account record.

Go to the record, click **Edit**, and make and save your changes. The Contact or Account record is updated. The Address object isn't used when multiple addresses are off, and there's nothing to synchronise.

Multiple Addresses and Data Storage

One final important consideration about multiple addresses is data storage.

Every Address record uses 2 KB of data storage. While that doesn't sound like a lot, it adds up. If you have 10,000 students who each have two addresses in a year—one during the academic year and one during the summer—that's 20 MB on student Address records. Over four or six years, that's 80 MB to 120 MB. Add in addresses for studying abroad, for family members who move, for faculty at home and at work, and you can see how address data storage continues to climb.

As an EDA admin, it's important to stay aware of your org's storage. In Setup, search for and select **Storage Usage**. The Current Data Storage Usage table shows the number of records, amount of storage, and percentage of storage used by each Salesforce object, in descending order of usage. Look for Addresses. If or when the Address storage grows too large, consider deleting old address records–especially seasonal addresses. However, be sure to keep any addresses for recruiting and admissions or advancement.

> **Note**
> The Latest Start Date and Latest End Date fields on Address records tell you the last time the Address was the Current Address. They are helpful in determining whether addresses are out of date and can be deleted.

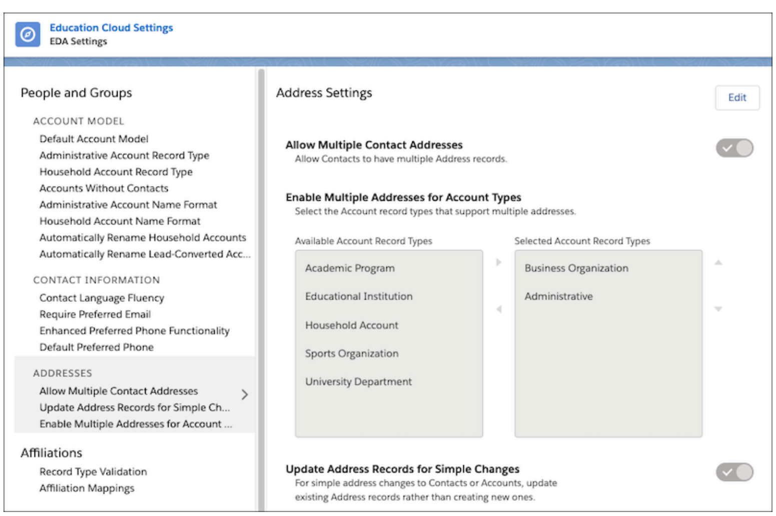
For most institutions, address storage isn't a major roadblock. However, if storage is a concern, we recommend that you still use multiple addresses on student Household Accounts, but not on Administrative or organisational Accounts. The automatic syncing of address data across Address, Account, and Contact records over a student's nomadic tenure at your institution is typically worth the trade-off.

Configure Address Settings

Manage and edit addresses for Contacts and Accounts in EDA.

Before You Begin

EDA allows you to track and manage one or more addresses for Contacts and Accounts. Use EDA Address Settings to configure multiple addresses and to determine how EDA handles simple updates to Address records.



Before configuring EDA Address Settings, make sure you understand when and how EDA synchronises multiple addresses across the Contact, Account, and Address objects, and determine where and when you want to use multiple addresses. See Understand Addresses in EDA .

For information about creating and editing Address records, see Address .

Configure Multiple Addresses for Contacts

Multiple addresses are on by default for Contacts, which allows you to track and manage multiple mailing addresses for Contacts by using Address object records.

If you're using Household Accounts as the default account model, turning off multiple addresses for Contacts doesn't do anything; all the rules for syncing address data between Contact, Account, and Address records still apply. Turning off multiple addresses for Contacts only affects Contacts that have an Administrative Account or an organisational Account as their parent Account, and only if you've turned off multiple addresses for those Account types. If so, one mailing address is stored on the Contact record.

1. From Education Cloud Settings, under Education Data Architecture, click **Settings**.
2. In EDA Settings, click **Addresses** and then click **Edit**.
3. Select or deselect Allow Multiple Contact Addresses.
4. Save your changes.

Configure Multiple Addresses for Household Accounts

Multiple addresses for Household Accounts are always turned on in EDA. They can't be turned off. In EDA Address Settings, in the Enable Multiple Addresses for Account Types table, moving Household Account between Available Account Record Types and Selected Account Record Types doesn't affect the availability of multiple addresses for Household Accounts.

If it's essential that you do not have multiple addresses enabled on Household Accounts, create a custom Account record type to represent households, and turn off multiple addresses for that Account type. See Verify or Change the Record Types Used for Administrative and Household Accounts.

Configure Multiple Addresses for Administrative Accounts

Multiple addresses are on by default for Administrative Accounts, which allows you to save multiple Address records for an Account. However, additional addresses are not synchronised with the Contact under the parent, container Administrative Account. With multiple addresses off for Administrative Accounts, one Billing Address is stored on the Account record.

1. From Education Cloud Settings, under Education Data Architecture, click **Settings**.

2. In EDA Settings, click **Addresses** and then click **Edit**.
3. To disable multiple addresses for Administrative Accounts, under Enable Multiple Addresses for Account Types, move Administrative from Selected Account Record Types to Available Account Record Types.
4. Save your changes.

Configure Multiple Addresses for Other Accounts

Multiple addresses are on by default for Business Organisation Accounts and off by default for all other institutional and organisational Account record types: Academic Program, Educational Institution, Sports Organisation, and University Department.

When multiple addresses are on for these Account types, additional addresses are saved as Address records and are not synchronised with their related Contacts. With multiple addresses off for these Account types, one Billing Address is stored on the Account record.

1. From Education Cloud Settings, under Education Data Architecture, click **Settings**.
2. In EDA Settings, click **Addresses** and then click **Edit**.
3. Under Enable Multiple Addresses for Account Types, move an Account type to Selected Account Record Types to turn on multiple addresses, or move it to Available Account Record Types to turn off multiple addresses.
4. Save your changes.

Manage Simple Changes to Address Records

When using multiple addresses, by default EDA creates a new Address record every time you update an Address record. Sometimes, however, you only need to make a minor change –fix a typo or an incorrect house number, for example. For those types of minor updates, you can instruct EDA to update the existing Address record rather than create a new record, using the Update Address Records for Simple Changes setting in EDA Settings.

By default, Update Address Records for Simple Changes is off, which means that EDA creates a new Address record even for simple changes. If you turn it on, this setting tells EDA to not create new Address records for these minor changes:

- Changes to capitalisation in one or more mailing fields
- Adding or removing spaces in one or more mailing fields

- Changing the value in any one of these fields:
  - Postal Street
  - Postal Street2
  - Postal City
  - Postal State/Province
  - Zip/Postal Code
  - Postal Country
  - Mailing County
  - Address Type

Here are some examples of simple changes.

- Changing the Mailing Street from `123 Mission Street` to `415 Mission St.`
- Changing the Mailing City from `Sanfrancisco` to `San Francisco`
- Changing the Mailing State/Province from `TX` to `California`

EDA still creates a new Address record for changes that are more complex, including changing values in two or more mailing fields.

To turn on Update Address Records for Simple Changes:

1. From Education Cloud Settings, under Education Data Architecture, click **Settings**.
2. In EDA Settings, click **Addresses** and then click **Edit**.
3. Select **Update Address Records for Simple Changes**.
4. Save your changes.

State/Province and Country Picklists for EDA

Understand how EDA uses State and Country Picklists.

State/Province and Country Picklists for EDA

State and Country Picklists let users select states and countries from predefined, standardised lists, instead of entering state and country data into text fields. State and Country Picklists help protect data integrity by preventing typos, alternate spellings, and junk data.

> **Note**
> See Let Users Select State/Province and Country from Picklists to learn how to set up and configure this feature.

EDA supports State/Province and Country Picklists with these limitations:

- **Must use predefined State and Country abbreviations on Address records**. On Address records, use the same abbreviations for State and Country as defined in the State and Country Picklists configuration. EDA will write the full name of the State and Country on related Accounts and Contacts. For example, if you use both US and CA on the Address record you get United States and California on the Account and Contact records. If you use alternate spellings (such as USA), EDA will display an error.

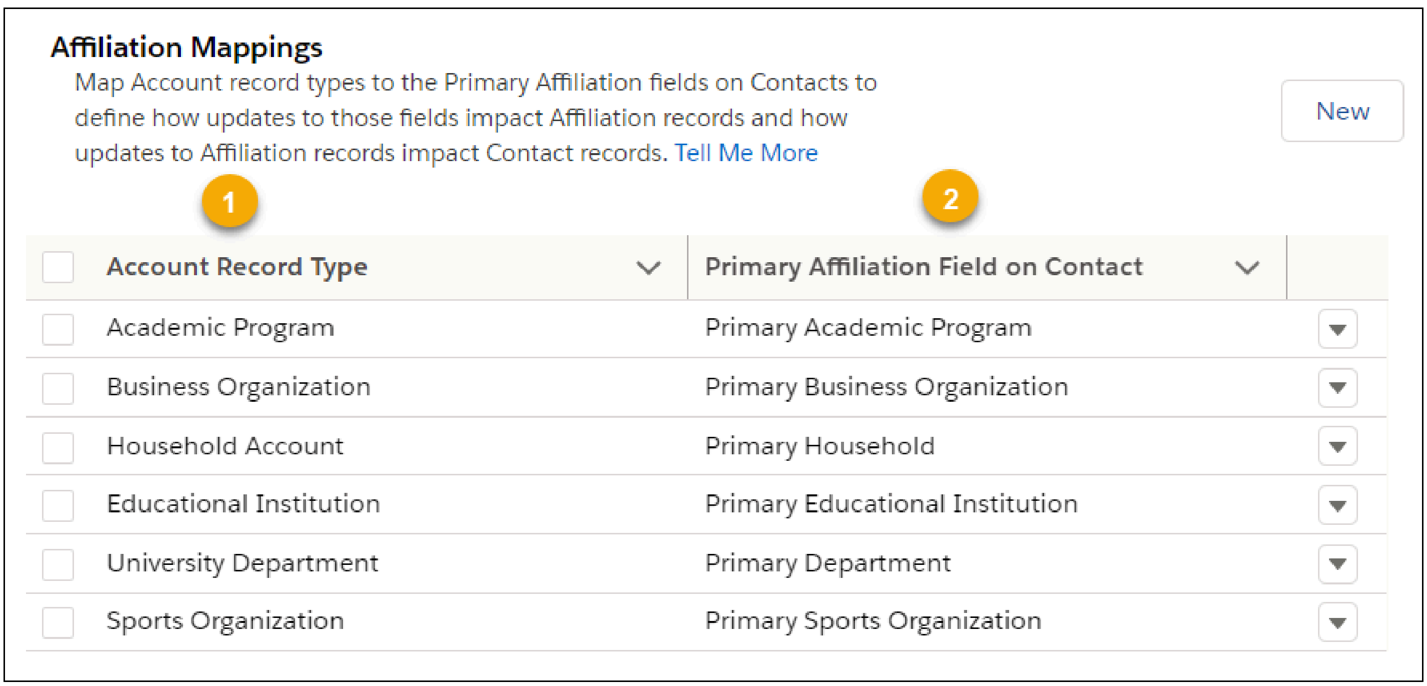
Configure Affiliations Settings

In EDA Settings, click Affiliations and configure the Contact fields mapped to Primary Affiliations.

Verify the Default Primary Affiliation Mappings

The Primary Affiliation fields on a Contact record each map to an Account record type, according to the Affiliation Mappings on the Affiliation Settings page.

Verify the mappings for the default Account record types (1) and their corresponding Primary Affiliation fields (2).



Account Record Type	Primary Affiliation Field on Contact
Academic Program	Primary Academic Program
Business Organization	Primary Business Organization
Household Account	Primary Household
Educational Institution	Primary Educational Institution
University Department	Primary Department
Sports Organization	Primary Sports Organization

On the HEDA Contact Layout, only the Primary Business Organisation and Primary Household fields are included by default.

Note
An Affiliation mapping for an Account record type can also be configured to automatically create related Program Enrolment records. By default, these auto-

enrolment settings are enabled for the Academic Program record type only. For details, see Verify Auto-Enrolment Settings for Programme Enrolments.

Add Affiliation Mappings for Custom Record Types

If you're using a custom Account record type that corresponds to a Primary Affiliation field on the Contact page layout, create an Affiliation mapping to sync their data.

For example, let's say that you enrol students in a Summer Learning Programme, a custom Account record type similar to the default Academic Programme Account record type.

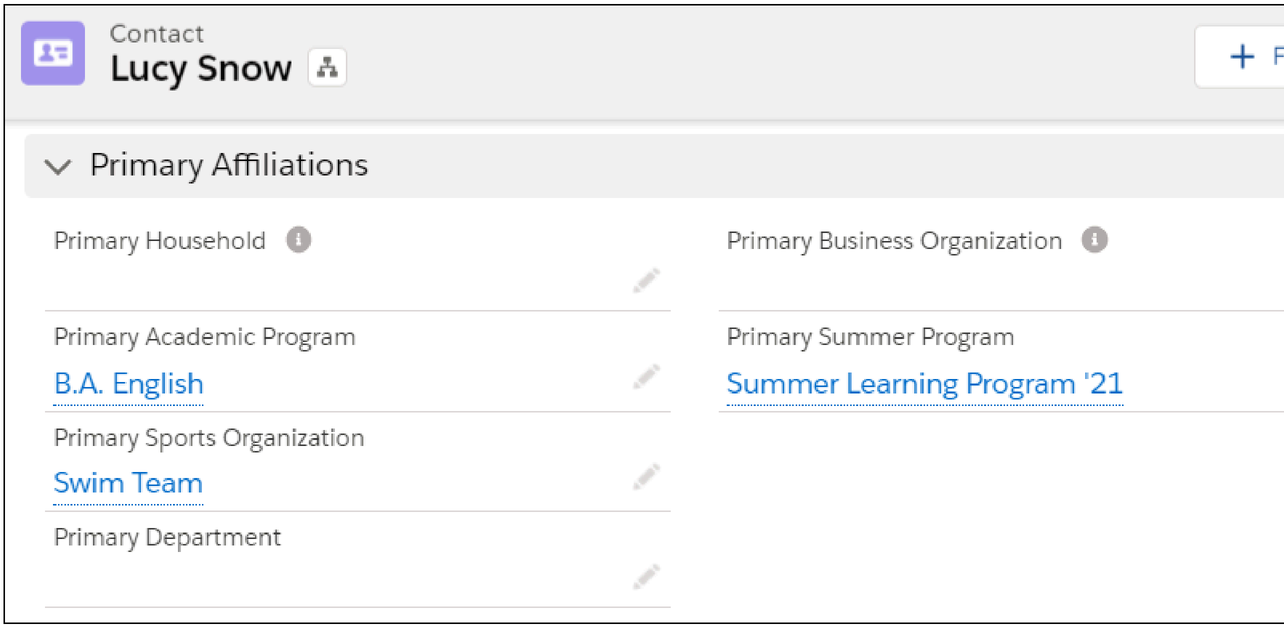
1. Verify the API name of the custom Account record type. In our example, it's Summer_Learning_Program.
2. Verify the field label of the corresponding Primary Affiliation field on the Contact page layout. In our example, it's Primary Summer Program.

   Note
   Ideally, the Account record type and Primary Affiliation field are similarly named for consistency.

3. Create the Affiliation mapping.
   a. In EDA Settings, click **Affiliation Mappings**.
   b. In the Affiliation Mapping section, click **New** and then select an **Account Record Type** and **Primary Affiliation Field on Contact**. The API names automatically appear below the selection.
   c. Save your changes.

4. Test the newly created Affiliation mapping.
   a. Create an Account record with the Summer Learning Program record type. For example, call it `Summer Learning Program '21`.
   b. On the student's Contact record:
      i. From the Affiliated Accounts related list, click **New**.
      ii. In Organisation, select **Summer Learning '21**.
      iii. Select **Primary**.
      iv. Save your changes.

      When you view Lucy's Contact record, Summer Learning '21 is her Primary Summer Programme.



Note
If you also want a related Program Enrolment record to be created automatically for Lucy, be sure to specify her Role in the Affiliation as Student. For more information, see Verify Auto-Enrolment Settings for Programme Enrolments.

Prevent Affiliation Mapping Errors

Affiliation mappings and Table Driven Trigger Management (TDTM) automation help keep data in Contacts' Primary Affiliation fields up-to-date. However, without additional configuration, it's possible for users to create erroneous Primary Affiliation data on Contact records. To guard against an Account record type without an Affiliation mapping, enforce record type validation.

1. In EDA Settings, click **Record Type Validation**.
2. If the setting isn't turned on, click **Edit**, select it, and click **Save**.

> **Note**
> If you installed EDA before version 1.119 (Summer '22), you can't edit Accounts if Record Type Validation is enabled and your language isn't set to English. To edit Accounts, disable Record Type Validation or remove your existing Affiliation mappings and add them again.

Configure Affiliation Mappings to Use Translated Values

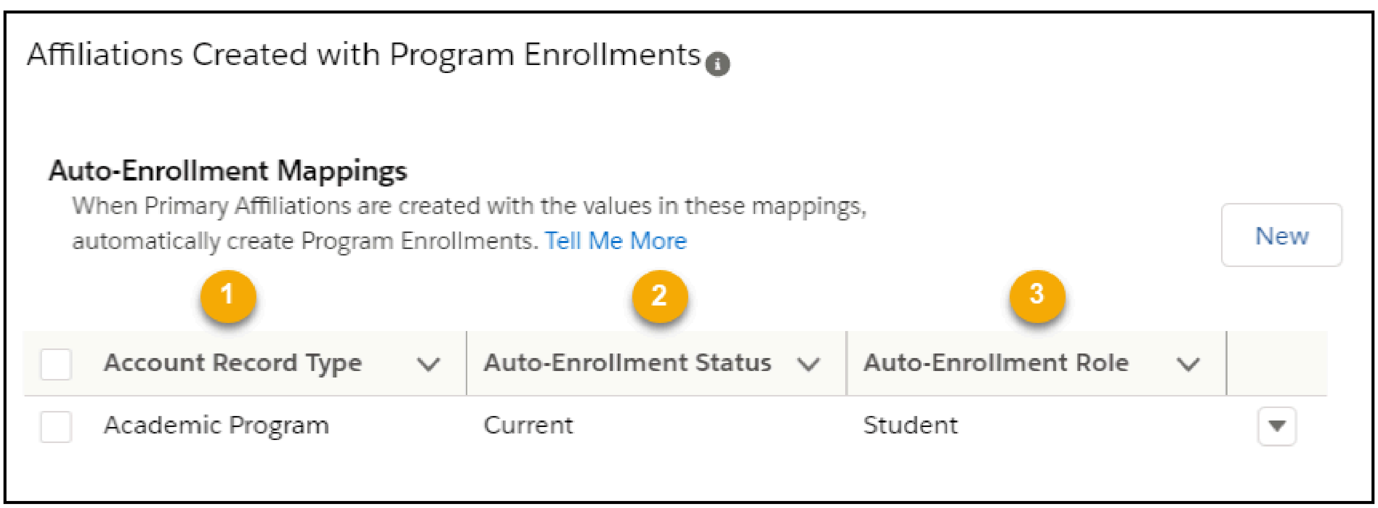
As of EDA version 1.114 (Summer '21), Affiliation mappings and their related API names are automatically associated for you, so no additional work is needed to translate these values. If you created translated labels in Translation Workbench before EDA version 1.114, we recommend that you refresh your settings so that translations display properly.

Verify Auto-Enrolment Settings for Programme Enrolments

The Academic Programme record type is different from other Account record types with Affiliation mappings–it's the only one with Auto-Enrolment settings specified by default.

When you create a Primary Affiliation for a Contact with values that match values in the default Auto-Enrolment Mappings in EDA Settings, you also create the following Affiliations:

- Academic Programme Account Record Type (1)
- Current Auto-Enrolment Status (2)
- Student Auto-Enrolment Role (3)
- Programme Enrolment



In other words, Auto-Enrolment mappings control how EDA handles Program Enrolments when ***Primary Affiliations*** are created. Contrast this automation with the other Programme Enrolment settings, which affect Affiliations related to Programme Enrolments that are deleted or created. These settings take effect only if the PREN_Affiliation_TDTM Trigger Handler is enabled. For Trigger Handler details, see Apex Class Descriptions for EDA .

For Account record types besides Academic Programme (or custom versions of Academic Programme), the Auto-Enrolment settings are likely not relevant.

Configure Affiliations Related to Deleted Programme Enrolments

Control how EDA handles Affiliations when their related Program Enrolments are deleted.

1. In EDA Settings, click **Programme Enrolment Deletions**.
2. Review these settings:

Affiliations Related to Deleted Programme Enrolments
By default, this setting is turned off. When a Program Enrolment is deleted, its associated Affiliation isn't deleted, but its status is set to the value specified in the next setting. If this setting is turned on and the related Affiliation has no other associated Program Enrolments, the Affiliation is deleted.

Status for Affiliations Not Deleted
If the related Affiliation isn't deleted with the Programme Enrolment, set its status to the value specified here. This setting applies only if Affiliations Related to Deleted Programme Enrolments is turned on and if the Affiliation has no other associated Programme Enrolments.

3. To change the default settings, click **Edit**, and then make and save your changes.

Configure Affiliations Created with Programme Enrolments

Control how EDA handles Affiliations when Program Enrolments are created without an existing Affiliation.

1. In EDA Settings, click **Program Enrolments**.
2. Review these settings:

Role for Created Affiliations
By default, this setting is set to None, and Affiliations that are created when a Program Enrolment is created have no role specified. If a value is selected for this setting, Affiliations created have the role specified here.

Status for Created Affiliations
Set the status of Affiliations created to the value specified here.

Affiliation End Date

By default, this setting is turned off. Affiliations created don't specify an end date. If this setting is turned on, the End Date value is copied from the Program Enrolment.

Affiliation Start Date

By default, this setting is turned off. Affiliations created don't specify a start date. If this setting is turned on, the Start Date value is copied from the Program Enrolment.

3. If you need to change the default settings, click **Edit**, and then make and save your changes.

Disable Contacts to Multiple Accounts

If the Contacts to Multiple Accounts feature is enabled in your org, we recommend that you disable it and use Affiliations instead.

The feature doesn't automatically relate a Contact and an Account based on a field's value (such as a Primary Business Organisation) and doesn't support automated soft credits. If you leave Contacts to Multiple Accounts enabled, it doesn't prevent the use of Affiliations.

1. Remove the Related Contacts related list from any Account page layout where it appears.
2. Remove the Related Accounts related list from any Contact page layout where it appears.
3. From **Setup**, enter `Account Settings` in the Quick Find box, then select **Account Settings**.
4. Click **Edit**, then deselect **Allow users to relate a contact to multiple accounts**.
5. Save your changes.

Configure Relationships Settings

Learn how to track important relationships between people and learn about optional configuration settings.

Overview

The Relationship object represents relationships between people, on or off campus, at your institution. You can track the status and type of relationship between two contacts using the fields on Relationship records.

When you create one relationship record, the Reciprocal Relationship feature creates a corresponding record for the other contact. For example, a Contact might have a Relationship record that connects her as a daughter to a Contact who's her father. When you create that relationship record, EDA automatically creates a Reciprocal Relationship for the related Contact with a type of Father.

For example use cases and details about creating Relationship records, see Relationship.

Before You Begin: Value Considerations for Relationships

The values that you use for Relationships require precise matches everywhere that they're used. Mismatched values that you use in reciprocal settings and as picklist values in the Type field of the Relationship object can cause errors and show as failed checks in Settings Health Check.

When you configure Relationships, follow these guidelines:

- Use API names for all values specified for Relationships, including picklist values and reciprocal settings.
- Note that all values are case-sensitive.
- Use English names. EDA supports only the picklist value name and not the label.
- Deactivate, delete, or edit the API names of Type values used in a reciprocal setting only in EDA Settings.

Configure the Reciprocal Method

The Reciprocal Method setting determines how Salesforce creates Reciprocal Relationships. There are two methods: the List Setting method and the Value Inversion method.

List Setting

The values in the Reciprocal Settings list determine the Type of Reciprocal Relationship that's created.

For example, if you create a Relationship from a male-gendered Contact record with the Type Son, EDA automatically creates a Reciprocal Relationship of Father on the son's record. Father and Son are preconfigured values in the Reciprocal Settings list.

Most orgs use List Setting, which is the default Reciprocal Method.

Value Inversion

EDA reverses the Type value on a Relationship record to reflect the reciprocal relationship.

For example, a Mother-Daughter Type of Relationship creates a reciprocal Type of Daughter-Mother. Value Inversion ignores the Reciprocal Settings list. Create picklist values on the Relationship object's Type field for Mother-Daughter, Daughter-Mother, and all other possible combinations. This example shows the word pair inverted around a hyphen, which is the default delimiter separating the Relationship roles.

Verify the selected Reciprocal Method, and change it if needed.

1. Click the **Education Cloud Settings** tab. If you don't see the Education Cloud Settings tab, access it from App Launcher. For details, see Education Cloud Settings.
2. Under Education Data Architecture, click **Settings**.
3. Click **Relationships** and verify the Reciprocal Method value.
4. To change the Reciprocal Method:
    a. Click **Edit**.
    b. Select a different value.
    c. Save your changes.

Custom Reciprocal Relationships

Whether you use List Setting or Value Inversion to create Reciprocal Relationships, additional configuration is sometimes required to customise the default values. Review the usage and configuration details in this table to see if they apply.

Reciprocal Method	Optional Configuration
List Setting	Because some Reciprocal Settings' values are gender-specific, gender data is involved in determining Type values. • **Gender and Salutation fields**–The Reciprocal Settings look in a Contact's Gender field for the values of Female or Male. If the Contact's gender isn't yet determined, the Reciprocal Settings look in the Salutation field for the Female and Male values. If the gender remains undetermined, the Reciprocal Setting's value is Neutral. • **Female and Male custom labels**–The values in the Female and Male custom labels determine how Gender picklist values and Salutation picklist values map to Female or Male. To allow more gender options than the default values of Female and Male, add values to these custom labels. Separate additional values with a comma. For example, let's say that you add Trans Woman to the Female custom label value to become Female,Trans Woman. Then a gender of Trans Woman or Female would be considered Female.
Value Inversion	The delimiter that separates each Contact's role in the Relationship is specified in the Relationship_Split custom label. You can edit the custom label value to use a different delimiter than the default hyphen delimiter, as used in the Mother-Daughter example.

Edit Custom Reciprocal Relationship Values

1. From Setup, in the Quick Find box, enter **Custom Labels**, then select **Custom Labels**.
2. Click **Edit** next to the custom label, such as Female, Male, or Relationship_Split.
3. Edit the Value as described in Custom Reciprocal Relationships.

4. Save your changes.

Add or Edit Reciprocal Settings

Reciprocal relationship settings define the types of relationships that you track between Contacts. Edit the provided values or add others as needed.

Salesforce names a relationship based on a Contact's gender. Let's consider an example involving sibling relationships.

First, create a reciprocal setting named Brother and specify the Reciprocal Relationship values that you want to create. After you add the new values to the Reciprocal Settings list, when you save a Relationship record with a Type (Name) of Brother, you also create a Reciprocal Relationship with one of the values specified for Female, Male, or Neutral. The List Setting method's rules that determine gender determines the gender for each Contact. We conclude our example here, but it's incomplete. Because the Contact's gender and the related (reciprocal) Contact's gender can be known or unknown, create two more reciprocal settings–one named Sister and one named Sibling–to account for other possible combinations.

If the Related Contact Is	Create This Reciprocal Relationship
Female	`Sister`
Male	`Brother`
Gender unknown	`Sibling`

To add to the Reciprocal Settings list or to edit existing settings:

1. In Education Cloud Settings, click **Reciprocal Settings**.
2. To create a mapping, click **Add Setting**.
3. Fill out the fields, select **Active**, and save your changes.
4. To change an existing setting, click for the mapping you want to change and then click **Edit**.
5. Make and save your changes.

Example Custom Reciprocal Settings

In addition to the default list of Reciprocal Settings for Reciprocal Relationships, you can add other Reciprocal Relationships to better represent your contacts' roles. Here are a few ideas depending on the type of relationships.

Siblings

Name	Male	Female	Neutral
Brother	Brother	Sister	Sibling

Name	Male	Female	Neutral
Sister	Brother	Sister	Sibling
Sibling	Brother	Sister	Sibling

Deceased Spouses

Name	Male	Female	Neutral
Widow	Deceased Spouse	Deceased Spouse	Deceased Spouse
Widower	Deceased Spouse	Deceased Spouse	Deceased Spouse
Deceased Spouse	Widower	Widow	Deceased Spouse

Divorces and Former Spouses

Name	Male	Female	Neutral
Ex-Husband	Ex-Husband	Ex-Wife	Former Partner
Ex-Wife	Ex-Husband	Ex-Wife	Former Partner
Former Partner	Ex-Husband	Ex-Wife	Former Partner

Add or Edit Auto-Create Settings

Auto-created Relationships allow a custom Contact lookup field on the Contact or Campaign Member object to automatically create a new Relationship.

For example, you can create a Referee lookup field on the Campaign Member object to track the person who introduced someone to your institution. Then create an Auto-Create Setting to automatically create Referrer and Referee Relationships between the Contacts.

> **Note**
> Auto-created Relationships aren't available for Leads or Campaign Member objects that reference Leads.

Before adding an Auto-Create setting, complete these prerequisites.

- Create a custom Contact lookup field on either the Contact or Campaign Member object. In our example, we create a Referee lookup field on Campaign Member.

  > **Tip**
  > Remember to add the new field to your Campaign Member page layout and set field-level security appropriately.

- Make sure that the Relationship object's Type field has picklist values that reflect the type of Relationship represented by the lookup relationship. Continuing our example, we add values for `Referrer` and `Referee`.
- If you're using the List Setting method, ensure that existing Reciprocal Settings reflect the type of Relationship represented by the lookup relationship. In our example, we add settings named `Referee` and `Referrer`.

To add an Auto-Create setting:

1. In Setup, in the Quick Find box, enter `Custom Settings`, and then select **Custom Settings**.
2. Next to Relationship Auto-Create, click **Manage**, and then click **New**.
3. Enter Relationship Auto-Create Information.
   a. Enter a name for the Relationship Auto-Create. For example, `Referee`.
   b. If the lookup field is on the Campaign Member object, enter the Campaign Type that this Auto-Create Setting applies to. Separate multiple values with semicolons and no spaces.
   c. Enter the label of the lookup field that triggers the creation of the Relationship.
   d. Enter the object that has the lookup field. For example, either `Campaign Member` or `Contact`.
   e. Enter the type of Relationship that you want to create. For example, `Referrer`. The Reciprocal Relationship is created automatically after you add the setting.
4. Save your changes.

If you're deleting an existing Auto-Create setting, be sure to click **Edit** and then click the trash icon. Don't modify the field values in the setting you're removing before deleting it.

Prevent Duplicate Relationships

By default, if an existing Relationship between two Contacts has the same Type as a Relationship that would be auto-created based on your settings, a duplicate Relationship can't be created. If you prefer to allow Relationship auto-creation even when it duplicates existing Relationships, edit the Prevent Duplicate Relationships setting.

1. Click the **Education Cloud Settings** tab. If you don't see the Education Cloud Settings tab, access it from App Launcher. For details, see Education Cloud Settings.
2. Under Education Data Architecture, click **Settings**.
3. Click **Prevent Duplicate Relationships**.
4. Click **Edit** and turn the setting off.
5. Save your changes.

Configure Leads Settings

Customise the Lead object for use in your educational institution.

Configure Lead for EDA

Lead is a sales-focused standard object, which means your institution is not likely to use all of its available fields. To minimise potential confusion, we recommend that you update your security settings, navigation, and various layouts to reference only the Lead fields you need for EDA.

While making these changes, also ensure that any staff who convert Leads have the appropriate Account record type assignments. And, for future use with assignment rules and Lead processes, consider creating custom Lead Status picklist values that align with your institution's recruiting process.

The Lead Settings page in Setup controls some of the basic behaviours and conversion settings for your org. We recommend these settings.

Lead Queue Settings

Specify the user or queue that owns the Leads when assignment rules don't apply. You can also select to notify the Lead owner.

Lead Conversion Settings

Select Require Validation for Converted Leads to ensure that these EDA triggers fire when a Lead is converted: ADDR_Account_TDTM, ADDR_Contact_TDTM, CON_DoNotContact_TDTM, CON_Preferred_TDTM, and CON_PreferredPhone_TDTM. For more information about these triggers, see Apex Class Descriptions for EDA.

Select Hide Opportunity Section of Convert Lead Window if your institution doesn't use Opportunities.

Lead Merge Settings

If your org-wide sharing default for Leads is Public Read/Write/Transfer, select Org-Wide Merge and Delete settings to let users merge and delete Leads.

To track additional information for suspects, create custom fields on the Lead object. Then consider mapping the custom Lead fields to custom fields on Account, Contact, or Opportunity. These mappings are used when you convert Leads. For detailed steps, see Map Custom Lead Fields for Lead Conversion in Salesforce Help.

To direct Leads to the right owners, create Lead assignment rules. For example, to assign all Leads whose last names range from A-E to a specific user or queue, go to the Lead Assignment Rules page in Setup. For detailed steps, see Set Up Assignment Rules in Salesforce Help.

Lead processes let you define which Lead Status values apply to specific Lead record types. For example, let's say that Leads from a testing service cycle through different statuses than Leads from a college fair. Most institutions do fine without using Lead processes. If you need them, first update the Lead Status picklist values. Then create a Lead Process and assign it to a Lead Record Type.

We also recommend you review Things to Know About Leads in Salesforce Help.

Configure Accounts Created During Lead Conversion

When you convert a Lead to a Contact, EDA automatically creates a container Account record for the Contact using the record type you specify. However, the name of the created Account depends on these Account Model settings in EDA Settings.

Setting	Default Value
Default Account Model	Administrative
Administrative Account Name Format	`{!LastName} Administrative Account`
Household Account Name Format	`{!LastName} Household`
Automatically Rename Household Accounts	Turned On
Automatically Rename Lead-Converted Accounts	Administrative and Household Account If you started with EDA version 1.114 (Summer ‘21), the Administrative and Household Account record types are added to the list of selected record types by default. If you started with an earlier version of EDA, select the record types to use.

If a Lead is converted using a record type that is specified in Automatically Rename Lead-Converted Accounts, EDA names the Account as follows.

- When Administrative or Household Account record types are selected, Leads converted using these record types have an Account name that follows the format specified in either Administrative Account Name Format or Household Account Name Format.
- When other Account record types are selected, Leads converted using these record types have an Account name that follows the default EDA Account name format of `{!LastName} Account`.

If a Lead is converted using a record type that is not specified in Automatically Rename Lead-Converted Accounts, the Account name is based on the Company field on the Lead record, which is standard Salesforce behaviour.

If your org uses Household Account as your Default Account Model, EDA names the Account as follows.

- If Automatically Rename Household Accounts is turned on, Leads converted using the Household Account record type have an Account name that follows the format specified in Household Account Name Format, regardless of whether Household Account is selected in Automatically Rename Lead-Converted Accounts.
- If Automatically Rename Household Accounts is turned off and Automatically Rename Lead-Converted Accounts doesn't specify Household Account, Leads converted using the Household Account record type have an Account name based on the Company field.
- If Automatically Rename Household Accounts is turned off and Automatically Rename Lead-Converted Accounts does specify Household Account, Leads converted using the Household Account record type have an Account name that follows the format specified in Household Account Name Format.

If a user selects an existing Account when converting a Lead, the Account name doesn't change.

Now that you understand how Account naming works for converted Leads, update your EDA Settings.

1. From Education Cloud Settings, under Education Data Architecture, click **Settings**. If you don't see the Education Cloud Settings tab, access it from App Launcher or see Education Cloud Settings.
2. In EDA Settings, click **Account Model** and then click **Edit**.
3. For Automatically Rename Lead-Converted Accounts, update the list of selected account record types to include the record types you want available for Account renaming when converting Leads.
4. Save your changes.

Note
Make sure the RenameLeadConvertedAccounts_TDTM Trigger Handler is enabled, otherwise Account renaming for converted Leads doesn't work. For Trigger Handler details, see Apex Class Descriptions for EDA.

If you have existing automation in place for Account naming, be sure to clear the Selected Account Record Types list in Automatically Rename Lead-Converted Accounts, including the Administrative and Household Accounts that are included by default.

For information about Account record types, refer to Customise Administrative and Household Names.

Configure Error Handling in EDA

Set up how EDA handles and tracks errors.

Overview

Certain EDA jobs, such as most Apex jobs, run asynchronously in the background so they don't impact critical processes.

EDA includes error handling for these types of jobs, but the results aren't stored, by default. If you want to store the results of asynchronous jobs so you can view them at a time that's convenient for you, in EDA Settings, update the Error Handling setting.

> **Note**
> For an example of the types of jobs you can monitor this way, go to the Scheduled Jobs tab in Setup and look for jobs that are Submitted By EDA .

EDA doesn't include error handling for code that runs synchronously because it can cause these types of problems:

- Masking errors for other applications: If the error handler catches the exception, the transaction succeeds from a platform perspective. But if the application doesn't know that the transaction failed, it won't retry it or take further action.
- Losing your save points: All of EDA's logic gets routed through the Trigger Handler dispatcher class. The run method is static, however a save point isn't static. This could mean that Trigger Handler runs get lost.
- Using up your DML limits: Every time you set up a save point, you consume a DML statement. Learn about Apex limits in Execution Governors and Limits in the Apex Developer Guide.

We recommend that you avoid generic error handling for synchronous jobs.

Error Handling Configuration Options

Configure asynchronous error handling using these settings from the Errors page in EDA Settings.

Store Errors

Select to store errors on the Error object. To access stored errors, see Configure Error Tracking.

Error Notifications

Select to post notifications to all System Administrators, a single user, or a Chatter Group when errors occur.

Error Handling

Select to allow error handling for asynchronous jobs, making it easier to see when scheduled jobs fail.

Debug Logging

Select to enable Salesforce support to view debug statements for managed packages.

Configure Error Tracking

To access errors stored after enabling the Store Errors setting, add the Error custom object to your Education Data Architecture app.

1. Click , then click **Setup**.
2. Enter `Tabs` in the quick find box, then select **Tabs**.
3. In the Custom Object Tabs section, click **New**.
4. Select Error as the Object, choose a tab style, and then click **Next**.
5. Set the tab visibility to Default On for your System Administrator profiles and Default Off for all other profiles. Then click **Next**.
6. Add the tab to the Education Data Architecture app. Deselect the Include Tab checkbox to clear any existing selections, then select the checkbox just for the Education Data Architecture app.
7. Save your changes.

   Now the Education Data Architecture app includes an Errors tab that you can use to review errors.

EDA and Translation

Learn how EDA is localised and how to manage translations.

Frequently Asked Questions

Get answers to questions about localisation, including frequency, languages, and documentation.

How often do you localise Salesforce.org products?

We localise our product labels and text as part of every major seasonal release.

What languages do you localise into?

Salesforce.org localises by package, not by product, so the languages vary. See Available Languages. Salesforce offers three levels of language support: fully supported languages, end-user languages, and platform-only languages. For more information, see Supported Languages.

Do you localise product documentation?

We currently localize documentation for these products: Accounting Subledger, Accounting Subledger Legacy, Case Management, Education Cloud, Education Data Architecture (EDA), Grants Management, Insights Platform Data Integrity, Marketing Cloud Engagement for Industries, Nonprofit Cloud, Nonprofit Success Pack (NPSP), Outbound Funds Module, Program Management Module (PMM), and Student Success Hub (SSH). See Available Languages for details. See Localised Documentation for a list of links to documentation.

I noticed a mistake or something missing from a translation. Where do I report it?

Keep in mind that we update translations only for major releases, so they can be out of sync after minor releases. To report a mistake, create a case with the Topic set to `Setup and Security`, and the Category set to `Globalisation and Localisation`.

Can I override translations?

Absolutely. You can use the Translation Workbench to override translations. To learn more, see Translation Workbench.

What's the difference between language and locale?

In Salesforce, you'll see both Language and Locale settings. Locale determines the display formats for date and time, addresses, phone numbers, and commas and periods in numbers. Language determines the language that objects, fields, settings, and user interface text appear in.

Do you accept translations from the community?

Even though many of our products are open source, we don't currently accept GitHub pull requests for localisation contributions. The localisation process requires a level of maintenance that's not realistic or sustainable for community contributors, and we therefore rely on our own localisation programs to deliver high-quality, timely translations.

Available Languages

See the list of languages availble for Nonprofit Cloud Education Cloud Education Data Architecture Accounting Subledger Legacy .

Salesforce.org provides translations into these languages. When you choose one of the supported languages during user (or org-wide) setup, Nonprofit Cloud Education Cloud Education Data Architecture Accounting Subledger Legacy objects, fields, settings, and user interface text appear in that language.

Accounting Subledger Legacy

Language	UI	Documentation
Catalan	√	√
Dutch	√	√

Language	UI	Documentation
English (UK)	√	√
Finnish	√	√
French	√	√
German	√	√
Japanese	√	√
Spanish	√	√
Spanish (Mexico)	√	√

Education Cloud

See Salesforce Language Support.

Education Data Architecture

Language	UI	Documentation
Catalan	√	
Dutch	√	
English (UK)	√	√
Finnish	√	
French	√	√
German	√	
Japanese	√	√
Spanish	√	√
Spanish (Mexico)	√	

Nonprofit Cloud

See Salesforce Language Support.

Localised Documentation

Get links to documentation in other languages.

Use these links to access the localised documentation for each available language.

Accounting Subledger Legacy

- Catalan
- Dutch

- English (UK)
- Finnish
- French
- German
- Japanese
- Spanish (Spain)
- Spanish (Mexico)

Education Cloud

- Chinese (Simplified)
- Chinese (Traditional)
- Danish
- Dutch
- Finnish
- French
- German
- Italian
- Japanese
- Korean
- Norwegian
- Portuguese (Brazil)
- Russian
- Spanish (Spain)
- Spanish (Mexico)
- Swedish

Education Data Architecture

- Catalan (Spain)
- Dutch
- English (UK)
- Finish
- French

- German
- Japanese
- Spanish (Spain)
- Spanish (Mexico)

Nonprofit Cloud

- Chinese (Simplified)
- Chinese (Traditional)
- Danish
- Dutch
- Finnish
- French
- German
- Italian
- Japanese
- Korean
- Norwegian
- Portuguese (Brazil)
- Russian
- Spanish (Spain)
- Spanish (Mexico)
- Swedish

Translation Limitations

If you're localising your org on your own, you need to be aware that there are some issues and considerations due to the nature of the EDA package.

This list of "trouble areas" in the product cannot or should not be translated. In each area, we provide details on the appropriate way to handle the situation, whether it's through translating the items on your own, or leaving things as-is. As we update the product, where possible, we are working to address gaps that prevent EDA from being fully localised.

To learn more about translating values on your own, read more here.

To learn more about custom labels, read more here.

Account Name Formats

We've identified a known issue that sometimes prevents users from creating Contacts when they switch from one language to another language. If you experience this, in EDA Settings, reset the values for Account Name Formats in Account Model Settings.

Other Picklist Values

Do not change the picklist value API names for Preferred Phone or Preferred Email. If you want to override the language translation for any of the following picklist values, do so in the Translation Workbench.

- PicklistValue.Contact.hed__PreferredPhone.Home
- PicklistValue.Contact.hed__PreferredPhone.Mobile
- PicklistValue.Contact.hed__PreferredPhone.Other
- PicklistValue.Contact.hed__PreferredPhone.Work
- PicklistValue.Contact.hed__Preferred_Email.Alternate
- PicklistValue.Contact.hed__Preferred_Email.Personal
- PicklistValue.Contact.hed__Preferred_Email.Work

Enable Languages

Enable localisation in Salesforce for your Nonprofit Cloud Education Cloud Education Data Architecture Accounting Subledger Legacy product.

We recommend that you complete these steps to enable a language for use in Nonprofit Cloud Education Cloud Education Data Architecture Accounting Subledger Legacy :

1. Before using any translated languages, enable Translation Workbench in Setup. For information, see Enable and Disable the Translation Workbench.
2. If you're enabling a platform-only language (for example, Catalan):

    a. From Setup, search for and then select **Enable platform-only languages**.
    b. Move the desired language to the Displayed Languages list.
    c. Save your changes.

Add Your School's Data

Learn how to migrate your school's data, import it in a recommended sequence, and prevent "Duplicates Detected" errors in EDA.

Migrate Data in EDA

Prepare to migrate your data to EDA .

Before You Migrate Data

Before migrating data to EDA , we recommend that you learn about the EDA data model. Understanding which objects are available and how your data maps to them can help you decide whether to migrate all of your data or just some of it. If you're migrating all of your data and are replacing a legacy system, follow the steps for installing and configuring EDA in a new org. If you're integrating a legacy system with EDA , we recommend using a middleware tool to build the integrated system, starting with the standard EDA data model, then customising it to accommodate the data from the legacy system.

Familiarity with the EDA data model also helps you decide whether you can use only existing EDA objects or whether you need custom objects. While you're free to create as many custom objects as you need, we recommend using EDA objects instead of creating custom objects when possible, to make sure that you can use new tools and features as they're released. For information, see Welcome to Your EDA Data Model Orientation.

After learning about the EDA data model, take some time to get acquainted with the automation that affects imported data and our Recommended Data Import Sequence for EDA.

Modify Your Settings

To make sure that you're able to merge data, review the prerequisites before migrating.

- In EDA Settings, turn off **Record Type Validation**.

- Disable these EDA triggers:
  - ACCT_CannotDelete_TDTM
  - ADDR_CannotDelete_TDTM
  - AFFL_CannotDelete_TDTM
  - BEH_CannotDelete_TDTM
  - CASE_CannotDelete_TDTM
  - CON_CannotDelete_TDTM
  - COUR_CannotDelete_TDTM
  - COFF_CannotDelete_TDTM
  - FACI_CannotDelete_TDTM
  - PReq_CannotDelete_TDTM
  - PREN_CannotDelete_TDTM
  - PPlan_CannotDelete_TDTM

  See Disable Trigger Handlers for EDA.

You can turn these settings and triggers back on after merging your data.

If your batches time out before a merge completes, include fewer records in them. Batch size processing defaults to 200 records per migration, which can be too large if you have other existing automation.

> **Tip**
> In most cases, we recommend that you work with a partner to migrate your data and to build customisations. If you don't work with a partner, be sure to migrate data to a Sandbox org before moving it to a Production org. To migrate data from an existing org to your fresh org, you can also Request an Org Swap.

For additional information about migrating data in Salesforce, see Migrate data from one organisation to another in Salesforce Help.

Move Data Within Salesforce

You can use Data Mover to quickly and easily take a flat data set within Salesforce and create related records, even records with complex relationships and hierarchies. Data Mover is not an import tool–instead, it maps and moves data from a single staging object into other Salesforce objects.

Learn more about Data Mover Documentation.

Recommended Data Import Sequence for EDA

Follow these steps to import your data into EDA.

Choose Which Automation Features to Use

Typically, you're integrating data into EDA from your Student Information System, course catalogue, and other external systems using common data integration tools such as Salesforce APIs or Lightning Connect.

Before you import any data, review the automation that affects imported data and our recommended import sequence.

EDA has a number of automation features available thanks to Table-Driven Trigger Management (TDTM). It's important to understand the concepts to prevent unnecessary data from being created automatically. We recommend familiarising yourself with TDTM Overview and Apex Class Descriptions for EDA before disabling any automation settings.

After you're familiar with these concepts, take a look at this list of Trigger Handlers to learn what they control.

Fields on the Account Object

Data Type	Created With Automation	Trigger Handler
Administrative Account	If you're using the Administrative Account model and the Account field for a Contact is blank, the administrative account is automatically created when the Contact is created.	ACCT_IndividualAccounts_TDTM
Household Account	If you're using the Household Account model and the Account field for a Contact is blank, the household account is automatically created when the Contact is created.	ACCT_IndividualAccounts_TDTM

Fields on the Contact Object

Data Type	Created With Automation	Trigger Handler
Postal Address Primary Address Type	Sets the default Address record.	ADDR_Contact_TDTM
University Email Preferred Email: “University”	Populates Contact's Email field.	CON_Preferred_TDTM
Work Phone Preferred Phone: “Work”	Populates Contact’s Phone field	CON_Preferred_TDTM

Data Type	Created With Automation	Trigger Handler
Primary Education Institution Primary Department Primary Academic Programme	Creates Affiliation records for each.	CON_PrimaryAffls_TDTM
Contacts' Relationships	Reciprocal Relationship records. **Note:** Relationships in EDA are reciprocal, meaning for every Relationship record that relates a person to someone else, there is a second Relationship record that relates them back to that person. Reciprocal Relationship records are tedious and difficult to create manually, so we highly recommend that you leave this trigger enabled.	REL_Relationships_TDTM

After determining your automation preferences, prepare to import your data in the following recommended sequence.

Step 1. Import General School Information

Start with general school information.

Import School Accounts

Every Account needs to have a record type. Record types can be the default record types that come with EDA, or you can create custom record types.

As needed for your institution, create these Account records:

- Educational Institutions for the top-level entity representing your institution, such as the entire university, other colleges, and so on.
- University Departments that relate departments, schools, or campuses to the Courses that they are affiliated with
- Academic Programs, for example, BS Computer Science
- Sports Organisations
- Business Organisations
- Other custom Accounts. For example, you might want to track high schools for recruiting purposes or organisations (such as clubs or professional groups) that students or faculty are involved in.

Import Faculty Data

Next, import data for the faculty at your school.

Faculty Contact-related data
Every faculty member should be identified as a Contact. Faculty Contacts can use the Administrative Account model, or you can alternatively add them to the Educational Institution Account or Department Account.

Credential-related Attributes
Attributes with a Credential record type can be used to track licences, certifications, or endorsements earned by staff.

Contact Languages
A language spoken by a specific person connected to your institution. For example, Contact Language records can track an instructor's fluency in multiple languages.

Case, Behaviour Involvement, and Behaviour Response data
Track behaviour events such as an event a faculty member witnessed and reported.

Import General School Data

Finally, import data that is relevant to faculty, students, and the courses and activities that take place at your school. These include:

Facilities
Property assets like a classroom, a lecture hall, a laboratory, and other campus buildings. Facilities can also define relationships between property assets. For example, you could create a parent Facility record for the "Smith Science Building" with nested Facility records for the "East Wing" and "Lecture Hall 103."

Languages
A language spoken at your institution.

Step 2. Import Curriculum Information

Now, add data related to the structure and content of curriculum at your school.

Terms
Past, present, or future terms can apply to the entire institution or to individual schools or departments.

Courses
Organised by department, level, and so on. Each course must have its own record.

Time Blocks
Representing a specific period of time, Time Blocks often relate to Course Offerings.

Course Offerings
Past, present, or future instances of a course linked to a Term and, optionally, a Primary Faculty member.

Programme Plans
: Tied to an Academic Program, Program Plans are specific to a given set of requirements. For example, you might have an Academic Program of BS in Computer Science, but separate Program Plans for BS in Computer Science (2019) and BS in Computer Science (2018) if the requirements changed from 2018 to 2019.

Plan Requirements
: A specific course, a list of courses, or a general course requirement.

Step 3. Import Student Information

Student information is next.

Import Student Accounts

Create Account records for every student who has attended your school in the past and for those who are currently attending. Assign a record type to every Account.

> **Note**
> If the ACCT_IndividualAccounts_TDTM Trigger Handler is enabled, Administrative Account or Household Account records are created automatically when you import Contacts in the next step, making it unnecessary to import student Accounts. Make sure each student Account is created as either an Administrative Account or a Household Account.

Import Student Contacts

Import additional data for student Contacts to continue creating a more complete view of the student's personal and academic life. TDTM may have already created Address and Affiliation records.

Addresses
: One student can have many addresses, but only one is identified as the primary address. If the mailing address and Primary Address Type field are specified when a Contact is imported, a primary Address record is automatically created. Examples include campus address, home address, seasonal address such as housing during summer breaks or study abroad.

Relationships
: Connect Contacts to other Contacts, such as family members or advisors.

Affiliations
: Connect Contacts to Accounts, such as a department within the school or a sports team. If lookup fields on the Contact (such as Primary Education Institution, Primary

Department, or Primary Academic Program) are set when you import Contacts, primary Affiliation records for each type are automatically created.

Import Student Application Data

After you import Address, Relationship, Affiliation, and Contact data, import information that provides insight into students' educational background and is relevant to their enrolment at your institution.

Academic Certifications
: Track diplomas, degrees, or certifications that a student earned for completing a course of study.

Credentials
: Track extracurricular badges, certifications, or licences that a student has earned.

Applications
: Store information about a student's application to an educational institution or program.

Education History records
: Store data about a student's previous educational experience.

Test and Test Scores
: Track an instance of a student taking a particular test and the scores resulting from a test or an overall grade standing.

Import Programme Enrolments

Next, import Program Enrolments to easily track a student’s major, Program Plan, and Program Plan Requirements.

Import Course Connections

Add information about student progress in their program of study. In EDA Settings, under Course Connections, make sure that you've selected Course Connection Record Types and verified the record types before you import these records.

Taking the time to add past Courses and Course Offerings is particularly important, as it allows you to represent a student’s full course history.

Import Additional Student-Related Data

Finally, add data that provides additional insight about your students.

Student-related Attributes

Attributes with a Student Characteristic record type track situations that might require additional support, such as whether a student is an International Student or has a Section 504 plan in place.

Case, Behaviour Involvement, and Behaviour Response data
: Track behaviour events, a student's role in such an event, and the response that resulted from the incident.

Attendance Events
: Track a student's attendance.

Contact Languages
: Track the languages used by students and their family members.

Term Grades
: Track students' grades at milestones that you define.

> **Note**
> Some of this data may have been imported when you imported similar faculty-related data. If so, verify that all student-related data is also present.

Step 4. Import Suspect Information

After you import your student data, you're ready to import data for potential students, also known as "suspects" or "prospects" in recruiting and admissions parlance.

Suspects are people who haven't signalled interest in your institution, but whom you want to engage with marketing. In EDA, we recommend modelling suspects as Leads. When a suspect signals interest, they become a prospect and you convert their Lead record into Contact and Account–and optionally Opportunity–records. For more information about suspects and prospects, see Model Suspects and Prospects.

Most institutions import suspects based on a list obtained from a testing service, recruiting event, or other source. The list often provides only basic details, such as a name and an email.

Before importing a suspect list, clean up your data set to align with the Lead object. Review how the Lead fields map to the Contact, Account, and Opportunity fields so that you're ready when it's time to convert Leads. Understanding the mappings helps you clean up and prepare your import list. For details, see Lead Conversion Field Mapping in Salesforce Help.

In EDA, the most important Lead field is Company. The Company field is required and, depending on how you configure the Automatically Rename Lead-Converted Accounts setting in EDA Settings, it can impact the Account Name on Account records that are created when you convert Leads. If Automatically Rename Lead-Converted Accounts is configured with specified record types, Account names follow either the default EDA Account name format or the format specified in Administrative or Household Account Name Format in EDA Settings. If Automatically Rename Lead-Converted Accounts is not configured, standard Salesforce Account naming based on the Company field is used, so be sure to populate the Company field on Lead records with a value that is suitable as an Account name. If you're importing a .csv file, consider opening the file in a spreadsheet app and creating a formula that populates the Company field using the suspect's name and your required naming conventions.

Here are some other things to consider when preparing your data set.

- Does your institution use assignment rules for Leads? If so, what fields do you want included?
- Does your institution have custom Lead fields to include?
- Does your institution use Lead processes that rely on a specific value for the Lead Status field?

After your import list is ready, create a Lead record for each suspect.

Disable Matching Rules

Learn why you receive a "Duplicates Detected" error when inserting records and how to prevent it.

When importing or restoring data to Salesforce you may see this error message:

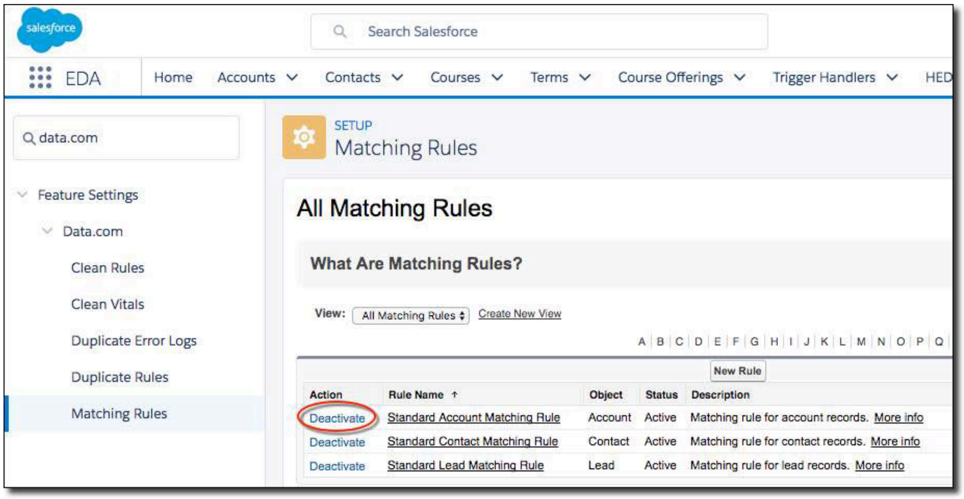
```
Message: "Insert failed. First exception on row 1; first error:
 DUPLICATES_DETECTED, Duplicate Alert: []"
```

This error is caused by a Matching Rule. In the Salesforce Spring '16 release, Duplicate Management was added to help avoid duplicate records. If this rule is enabled, you will receive this error if duplicates are found when trying to insert records.

To disable Matching Rules in your Salesforce organisation:

1. Log into your Salesforce account as the System Administrator.
2. Click , then click **Setup**.
3. From Setup, enter `Matching Rules` in the Quick Find box, then click **Matching Rules**.

4. Click **Deactivate** next to the rule that needs to be disabled.



5. Click **OK**.

Salesforce sends you an email when the rule is successfully deactivated. You should no longer see the duplicate record error message when importing data into Salesforce.

For more information on Duplicate Management, see Manage Duplicate Records.

EDA Object Reference

List of EDA objects and their descriptions.

Academic Certification

Academic Certification represents an academic degree, diploma, or certificate.

Sample Uses for Academic Certification

An Academic Certification identifies that a person has completed a course of study. Let's look at some uses for the Academic Certification object.

- University–Define a degree or certificate along with its academic level and fields of study that your institution offers.
- K-12–Define a diploma that your educational institution offers.

Academic Certification Record Types

Learn about the preconfigured records types that come with Education Data Architecture.

- Degree–A certification related to the completion of a course of study.

- Diploma–A certification related to the completion of a course of study, such as a high school diploma in the United States.
- Certificate–A certification related to the completion of specific courses.

Keep Up with Academic Certification Updates

Consider these updates, depending on which version of EDA you originally installed.

If Installed Before Version	Configuration Task
1.118	• Add the Academic Certification related list to the appropriate Account page layouts. • Add the following fields to the appropriate Education History page layouts. – Credentialling Identifier – Credits Earned – Status – Verification Status – Verification Status Date • Add the Education History lookup field to the Program Enrolment object. Learn about updating page layouts in Display a New Custom Object After a Product Release.

Create an Academic Certification Record

Track learners' degrees, diplomas, or other certifications by creating Academic Certification records.

1. If the Contact record has an Academic Certification related list, click **New**. If not, from the App Launcher, find and select **Academic Certifications**, and click **New**.
2. Select a record type and click **Next**.
3. Enter all relevant details.
4. Click **Save**. Or click **Save & New** to create another Academic Certification record.

Account

An Account represents either an organisational entity affiliated with a Contact or a container Account for a Contact.

Sample Uses for Account

Account is a standard Salesforce object, augmented with education-specific fields and record types. It can look quite different depending on how it's used.

- An ***affiliated Account*** represents an organisational entity that a Contact is affiliated with, such as a department or an academic programme that it administers, a sports team, or a business that partners with your institution.
- A ***container Account*** is either a ***Household Account*** that contains a group of Contacts, or an ***Administrative Account*** that contains just a single Contact.

Here are some common ways to use affiliated Accounts.

- University–Track academic departments, athletics programs, student-led campus organisations, technology transfer offices, and alumni associations. Track the degree programs that your undergraduate, graduate, or continuing education programs administer.
- K-12–Within a school, track departments, programs, parent teacher associations, and organisational partners. Within a district, track your member schools, district departments, and agency partners.
- Any educational institution–Track the entities that keep your institution thriving, from administrative departments to facilities and plant operations.

Account Record Types

Learn which container Account record types come preconfigured.

- **Administrative–**An Account-level representation of a Contact (generally a student), in a 1-to-1 relationship. An Administrative Account contains one and only one Contact.
- **Household Account–**A household that a student Contact belongs to. Household Accounts typically contain multiple Contacts besides the student.

These affiliated Account record types come preconfigured.

- **University Department–**A department that administers an academic programme (such as the Sociology Department) or an administrative programme (such as the Office of the Registrar).
- **Academic Program–**In higher ed, a degree- or credential-granting program such as a B.S. in Biology or J.D. degree. In primary and secondary education, an academic, student support, or recreational program, such as an extended day program or an after school club.
- **Business Organisation–**An organisation that partners with your institution, such as a vendor, internship sponsor, or organisation in the private, nonprofit, and public sectors.
- **Educational Institution–**An entity such as your entire institution or individual schools within it, such as a College of Letters and Science at a university, or Valley Elementary School within the Valley School District.

- **Sports Organisation–**A sports organisation, like the Women's Soccer Team or the Intramural Coed Hockey League.

If your implementation requires other record types or page layouts, feel free to create them. For example, a university can create unique record types for Undergraduate Program and Graduate Program, or a page layout for a University Department Account. A K-12 school can create a record type for College Prep Program, or a layout for an Academic Department Account.

Configure Account

Set up Account data for your educational institution and learn about the steps required to maintain the data.

Initial Configuration for Account

It's essential to understand how to manage Account data and configure related settings. Review these resources to make sure you have the full picture.

- Configure Account Model Settings
- Customise Administrative and Household Account Names
- Configure Address Settings
- Configure Affiliations Settings
- Various Table-Driven Trigger Management (TDTM) rules control the creation, update, and deletion of Account records and related records. Review the classes affecting the Account object in Apex Class Descriptions for EDA.

Keep Up with Account Updates

Consider these updates, depending on which version of EDA you originally installed.

> **Tip**
> As with all objects, verify and customise the security settings, navigation, and layouts for Contact, as needed. Follow the general instructions in Display a New Custom Object After a Product Release, keeping in mind that you're editing settings for a standard object rather than a custom object.

If Installed Before Version	Configuration Task
1.118	• Add the following fields to your Account page layouts, as needed. – Billing Address Inactive – Credentialling Email • Create a custom field for Credentialling Identifier and add it to your page layouts, as needed. See Model Certifications and Credentials. For more information, see Add Custom Fields and Picklist Values.
1.103	Add the School Code field to your Account page layouts, if needed.
1.101	Add these Postal County fields to your Account page layouts, as needed. • BillingCounty • Shipping County
1.74	Add the Time Block related list to your Account page layouts, if needed.
1.57	Create a separate page layout for the Academic Program Account record type. You can include the Program Plans related list on this without affecting other Account layouts.

Create Account Records

Understand when to let EDA create Account records automatically, and when and how to create Account records manually.

Know When to Let Salesforce Create Container Accounts Automatically

The best way to create Administrative or Household Account records–whichever your default account model specifies–is to let EDA automatically create the Account record for you, when you save a new, independent Contact record. Doing so helps maintain the precise relationship between a container Account and its associated Contact by ensuring that:

- The correct type of container Account is created, consistent with your institution's default account model.
- The container Account is named appropriately, consistent with your institution's account naming conventions.
- The container Account is synced appropriately with its Contact, both upon creation and upon future updates to either the Contact or its Account.

For details about the Account record being created with the Contact record, see Create a Contact Record.

Tip
If you're integrating data from a Student Information System, course catalogue, or other external system, learn about the automation that affects imported Account data and our Recommended Data Import Sequence for EDA .

Create a Container Account Manually

When you need a container Account that's a different type than the type specified by your default account model, we recommend that you not let us create it automatically. Instead, create the Account record yourself, and then create its associated Contact record.

1. Go to the Accounts tab.

   Tip
   Make sure that the container Account record doesn't already exist.

2. Click **New**
3. Select a record type and click **Next**.
4. Enter relevant details.
5. Click **Save**.

Create Affiliated Account Records

Create affiliated Account records to represent all of the departments, programs, and institutional entities that make up your campus. Typically, you create these multiple Account records when you start implementing EDA. Later on, if while creating a Contact record you find that the person is affiliated with an entity that doesn't have an Account record yet, you can then create the Account on the spot.

1. Click the Accounts tab and click **New**.
2. Select a record type matching the type of Account entity you're creating, and click **Next**.
3. Enter relevant details.

   Fill in the Parent Account field if you're creating an Account that belongs under another Account, as part of an Account hierarchy. For example, an Account representing the school is often the parent of a department, or a specific department is often the parent of an Academic Program.

4. Click **Save**.

Things to Know About Maintaining Account Data

Review considerations for how to maintain Account data for your educational institution.

Account and Contact data are tightly coupled. Updating data for a Contact that has a container Account, such as recording a name change or change of household, can trigger automatic changes to the name of the Contact's container Account. The specifics depend on your org's configuration. For details, see Customize Administrative and Household Account Names.

Address

Address represents a home, seasonal, or other address for a Contact or Account.

Sample Uses for Address

When you use multiple addresses, the Address object stores the addresses for related Contact and Account records, so you can manage the many addresses associated with a student, a household, or other entity.

- University–Track a student's address during the school year separately from their permanent home address.
- K-12–Track the two household addresses that a student splits time between.
- Any educational institution–Track a seasonal address for a household separate from its primary residence.

Configure Address

Keep the Address object up to date.

Initial Configuration for Address

You need to configure the Address object only if you're using multiple addresses, so start by determining whether and where you want to use them: on Contacts, Household Accounts, Administrative Accounts, institutional and organisational Accounts, or some combination of those entities. For information on how multiple addresses work, see Understand EDA Addresses. For information on enabling multiple addresses in your org, see Configure Address Settings.

Regardless of the EDA version that you started with, complete these tasks to configure Address.

1. Create or customise an Address page layout. We recommend the HEDA Address Layout that we provide, and that you add the Latest End Date and Latest Start Date fields to the layout.
2. Make sure the Account layout you're using, such as HEDA Household Layout, includes the Addresses related list.

3. Make sure that the values for the Primary Address Type picklist on the Contact object match the Address Type picklist values on the Address object. The default values are Home, Work, Vacation Residence, and Other.
4. Configure state and country picklists, which protect data integrity by having users select states and countries from predefined, standardised lists. See State and Country Picklists for EDA.

Keep Up with Address Updates

Consider these updates, depending on which version of EDA you originally installed.

If Installed Before Version	Configuration Task
1.118	Add the Inactive checkbox to your Address page layouts, as needed. For more information, see Add Custom Fields and Picklist Values.
1.101	• Add these fields to your page layouts, as needed. – Address layout: Mailing County – Contact layout: Mailing County, Other County – Account layout: Billing County, Shipping County
1.92	• On the Contact object, add `Vacation Residence` as a picklist value on the Primary Address Type and Secondary Address Type picklist fields.
1.14	• Enable multiple addresses for Contacts. See Configure Address Settings. • Add the Addresses related list to the HEDA Contact layout.

Create an Address Record

Create an address record from the Addresses related list for an account or contact.

Always create the first address for a Contact or Account from the new Contact or Account record. See Use Multiple Addresses for Contacts with Household Accounts or Manage Multiple Addresses for Other Types of Accounts for details. Create additional Address records in any of these ways, depending on your account model.

Create Additional Addresses for an Existing Household Account

Create additional new Addresses for an existing Household Account by starting from the Account record. Do not create them from the Addresses related list of a household Contact.

Address records created from the Contact related list aren't synchronised with the related Household Account.

1. On the Account record that requires a new address, click the **Related** tab.
2. In the Addresses related list, click **New**.
3. Complete these fields.

   Parent Account
   EDA automatically populates the Parent Account with the Account you started from.

   Parent Contact
   Leave blank. EDA automatically synchronises the address to all related household Contacts except those marked Do Not Automatically Update.

   Mailing fields
   Enter the street, city, state, and other mailing address details in the appropriate fields.

   Default Address
   If selected, when you save, the new address replaces the existing Account Billing Address and Contact Mailing Address on the related records–except for the Mailing Address on any household Contacts that have Do Not Automatically Update selected.

   Seasonal Start Day, Seasonal Start Month, Seasonal Start Year
   To have the address automatically become the Current Address for the Account and its Contacts on a certain date, select the start day, month, and year. Leave Seasonal Start Year blank to specify that the start date recurs every year.

   Seasonal End Day, Seasonal End Month, Seasonal End Year
   Enter the day, month, and year that the address is no longer the Current Address for the Account and its Contacts. Leave Seasonal End Year blank to specify that the end date recurs every year.

   > **Important**
   > Either add seasonal dates to an Address record or select Default Address. Don't do both. If an Address record has both seasonal dates and is marked as the default, then when the seasonal dates end, the same Address record–because it's also the default–continues to be the Current Address on related Contact and Account records.

4. Save your changes.

Create Additional Addresses for an Existing Administrative Account

Create additional new Addresses for an existing Administrative Account by starting from the Account's related Contact record. Additional addresses created from the Addresses related list on a Contact record are not synchronised with addresses for the Contact's related Account.

1. On the Contact record that requires a new address, click the **Related** tab.
2. In the Addresses related list, click **New**.
3. Complete these fields.

   Parent Account
   Leave blank.

   Parent Contact
   EDA automatically populates the Parent Contact with the Contact you started from.

   Mailing fields
   Enter the street, city, state, and other mailing address details in the appropriate fields.

   Default Address
   If selected, when you save, the new address replaces the existing Contact Mailing Address on the related record.

   Seasonal Start Day, Seasonal Start Month, Seasonal Start Year
   To have the address automatically become the Current Address for the Contact on a certain date, select the start day, month, and year. Leave Seasonal Start Year blank to specify that the start date recurs every year.

   Seasonal End Day, Seasonal End Month, Seasonal End Year
   Enter the day, month, and year that the address is no longer the Current Address for the Contact. Leave Seasonal End Year blank to specify that the end date recurs every year.

   > **Important**
   > Either add seasonal dates to an Address record or select Default Address. Don't do both. If an Address record has both seasonal dates and is marked as the default, then when the seasonal dates end, the same Address record–because it's also the default–continues to be the Current Address on related Contact and Account records.

4. Save your changes.

Create Additional Addresses for an Existing Institutional or Organisational Account

Additional addresses created from the Addresses related list on an institutional or organisational Account record are not synchronised with addresses for the Account's Contacts.

1. On the Account record that requires a new address, click the **Related** tab.
2. In the Addresses related list, click **New**.
3. Complete these fields.

   Parent Account
   EDA automatically populates the Parent Account with the Account you started from.

   Parent Contact
   Leave blank.

   Mailing fields
   Enter the street, city, state, and other mailing address details in the appropriate fields.

   Default Address
   If selected, when you save, the new address replaces the existing Account Billing Address on the related record.

   Seasonal Start Day, Seasonal Start Month, Seasonal Start Year
   To have the address automatically become the Current Address for the Account on a certain date, select the start day, month, and year. Leave Seasonal Start Year blank to specify that the start date recurs every year.

   Seasonal End Day, Seasonal End Month, Seasonal End Year
   Enter the day, month, and year that the address is no longer the Current Address for the Account. Leave Seasonal End Year blank to specify that the end date recurs every year.

   > **Important**
   > Either add seasonal dates to an Address record or select Default Address. Don't do both. If an Address record has both seasonal dates and is marked as the default, then when the seasonal dates end, the same Address record–because it's also the default–continues to be the Current Address on related Contact and Account records.

4. Save your changes.

Create Additional Addresses for an Existing Contact

Additional addresses created from the Addresses related list on a Contact record are not synchronised with addresses for the Contact's related Account. This behaviour applies to all Accounts: Household, Administrative, and all other types.

1. On the Contact record that requires a new address, click the **Related** tab.
2. In the Addresses related list, click **New**.
3. Complete these fields.

   Parent Account
   Leave blank.

   Parent Contact
   EDA automatically populates the Parent Contact with the Contact you started from.

   Mailing fields
   Enter the street, city, state, and other mailing address details in the appropriate fields.

   Default Address
   If selected, when you save, the new address replaces the existing Contact Mailing Address on the related record.

   Seasonal Start Day, Seasonal Start Month, Seasonal Start Year
   To have the address automatically become the Current Address for the Contact on a certain date, select the start day, month, and year. Leave Seasonal Start Year blank to specify that the start date recurs every year.

   Seasonal End Day, Seasonal End Month, Seasonal End Year
   Enter the day, month, and year that the address is no longer the Current Address for the Contact. Leave Seasonal End Year blank to specify that the end date recurs every year.

   > **Important**
   > Either add seasonal dates to an Address record or select Default Address. Don't do both. If an Address record has both seasonal dates and is marked as the default, then when the seasonal dates end, the same Address record–because it's also the default–continues to be the Current Address on related Contact and Account records.

4. Save your changes.

Edit Addresses

Update an address record from the Addresses related list for an account or contact.

By default, editing an Address record in any way–even a minor change such as fixing a typo–generates a new Address record with the same relationship or relationships as the original. In other words, if an Address record is related to student Sophia (the Contact) and to Sophia's Household Account, the new Address record is also related to Sophia's Contact and Household Account records.

You can instruct EDA to update an Address record rather than create a new Address record when you make minor changes such as fixing typos. For details, see Manage Simple Changes to Address Records.

Important
If you're ***not*** using multiple addresses, just edit the address directly on the Contact or Account record. The instructions here apply to editing Address records for Contacts and Accounts with multiple addresses turned on.

Edit Addresses for Household Accounts

When using multiple addresses with Household Accounts, we recommend always editing the Address record, not the Contact's Mailing Address or the Account's Billing Address, to ensure that changes are synchronised across the Address, Account, and all household Contact records.

1. Navigate to the Account record with an address you want to update.
2. In the Addresses related list, click the action menu for the Address you want to update and select **Edit**.
3. Change the address details as needed.
4. To have your changes take effect immediately, select **Default Address**.
5. Save your changes.

If you selected Default Address, the Account's Billing Address updates with the changes and so does the Contact's Mailing Address for all household Contacts except those that have Do Not Automatically Update selected.

Edit Addresses for Non-Household Accounts

Edits made to Address records for Administrative, institutional, and organisational Accounts are not synchronised with addresses for the Account's Contacts.

1. Navigate to the Account with an address you want to update.
2. In the Addresses related list, click the action menu for the Address you want to update and select **Edit**.

3. Change the address details as needed.
4. To have your changes take effect immediately on the Billing Address, select **Default Address**.
5. Save your changes.

Edits made to the Billing Address are reflected on the Address record, and vice versa.

Edit Addresses for Contacts

Edits made to Address records for a Contact with a container Household Account are synchronised with the related Household Account. Edits made to Address records for a Contact under a non-Household Account are not synchronised with the Account.

1. Navigate to the Contact with an address you want to update.
2. In the Addresses related list, click the action menu for the Address you want to update and select **Edit**.
3. Change the address details as needed.
4. To have your changes take effect immediately, select **Default Address**.
5. Save your changes.

Edits made to the Mailing Address are reflected on the Address record, and vice versa.

If the Contact has a Household Account, the Address record is synchronised with the Account record. And if you selected Default Address, the Contact's Mailing Address is updated on all household Contacts except those that have Do Not Automatically Update selected.

Mark an Address as Inactive

When someone moves and doesn't provide an updated address, or when an address shouldn't receive mail for some other reason, mark the address as inactive.

- For a Household and other types of Account, navigate to the Account with the address that you want to update. In the Addresses related list, click the action menu for the Address and select Edit. Select Inactive and save your changes.
- For a Contact, navigate to the Contact with the address you want to update. In the Addresses related list, click the action menu for the Address and select Edit. Select Inactive and save your changes.

Affiliation

Affiliation represents an affiliation between a Contact and an Account.

Sample Uses for Affiliation

The Affiliation object represents Contact-to-Account affiliations, which means that Affiliation records relate individual Contacts to Account entities. Affiliations are essential for tracking involvement in activities and organisations, on or off campus, both in the present and in the past.

- University–Track students' Affiliations with an Academic Program Account like B.S. in Biology or to a Sports Organisation Account like Women's Soccer Team. Track faculty Affiliations with a University Department like the Biology Department.
- K-12–Track students' Affiliations with an Academic Program like After-School Care or Extracurricular Activities. Track teachers', staff members', and administrators' Affiliations with an Educational Institution Account, such as a school district or a school.
- Any educational institution–When a Contact has more than a single Affiliation per record type, you can have one, and only one, ***Primary Affiliation*** to represent a Contact's special connection to a specific organisation. For example, a Primary Affiliation can connect a student to the department of her major.

At this time, an Affiliation can't be used to relate an Account to another Account.

Affiliated Account

We sometimes refer to the Account side of the Contact-to-Account relationship as an affiliated Account.

This term helps us distinguish between two types of Accounts:

- Accounts that have Contacts affiliated with them, such as an educational institution, sports organisation, or business organisation.
- Container Accounts that have Contacts related to them, such as an administrative or household Account.

For more information, see Account.

Configure Affiliation

Set up Affiliation data for your educational institution and learn about the steps required to maintain the data.

Initial Configuration for Affiliation

While the Affiliation object itself comes preconfigured and doesn't require additional configuration beyond your own preferred customisations, it's essential to understand how to manage Affiliation data and configure related settings. Review these resources to make sure you have the full picture.

- Configure Affiliation Settings
- Apex Class Descriptions for EDA

- Prevent Affiliation Mapping Errors

Keep Up with Affiliation Updates

Consider these updates, depending on which version of EDA you originally installed.

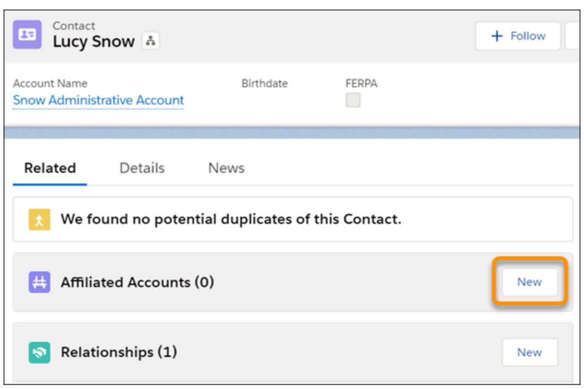
If Installed Before Version	Configuration Task
1.119	You can't edit Accounts if Record Type Validation is enabled and your language isn't set to English. To edit Accounts, choose an option. • Remove your existing Affiliation mappings and add them back as new mappings. • Disable Record Type Validation in EDA Settings. For details, see Configure Affiliation Settings Errors.

Create an Affiliation Record

Capture how learners relate to your educational institution by creating Affiliation records.

1. From the Contact record that you're creating an Affiliation record from, click **New** in the Affiliated Accounts related list.

   In this example, Lucy Snow's Contact record is the starting point for creating an Affiliation with the Department of English, the academic department that administers Lucy's major.

2. Enter relevant details, noting these fields in particular.

   - Organisation–Start typing the name of the affiliated Account (Department of English in our example), then select it if you see it suggested. If the Account record doesn't exist yet, click **New Account** to create it now.
   - Primary–If the Affiliation deserves a primary designation, select the Primary field.

     In our example, this departmental Affiliation represents Lucy majoring in English, and the Account record for the Department of English has a University Department record type. Consider these scenarios when deciding whether to select the Primary field.

Scenario	Primary Designation for the Departmental Affiliation
Lucy is majoring in English (single course of study)	When creating the Department of English as an affiliated Account record, select Primary.
Lucy is majoring in English and minoring in Biology	You've created the Department of English affiliated Account record and marked it Primary. When creating the Department of Biology as an affiliated Account (a separate Account record), don't select Primary.
Lucy changes her major from English to Biology	Edit the affiliated Account record for the Department of Biology and mark it Primary. Doing so automatically updates the Department of English affiliated Account record to remove its primary designation.
Lucy is double majoring in English and Biology	When creating the affiliated Account records for each major department, decide which one to treat as primary, because a Contact can have only one Primary Affiliated Account. You can pick only one for each affiliated Account record type, whether University Department, Academic Program, Education Institution, and so on. **Tip** You can, however, see Lucy's multiple Program Enrolment records indicating that she's pursuing multiple courses of study. The Program Enrolment records are typically created or updated automatically along with Academic Program records.

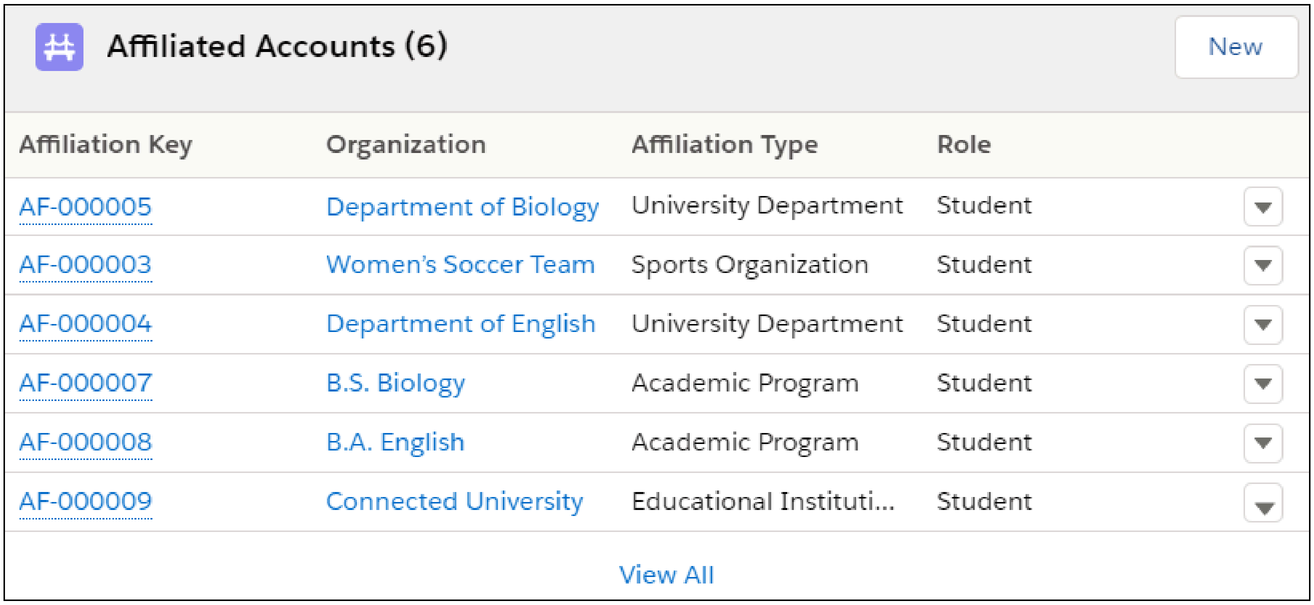
3. Click **Save**.

As you can see from this departmental Affiliation example, creating and editing Affiliation records can trigger automatic updates to other Affiliation records. Creating, editing, and deleting Program Enrolment records can also trigger automatic updates to Affiliation records, and vice versa. The specifics depend on your org's configuration.

View a Contact's Affiliations

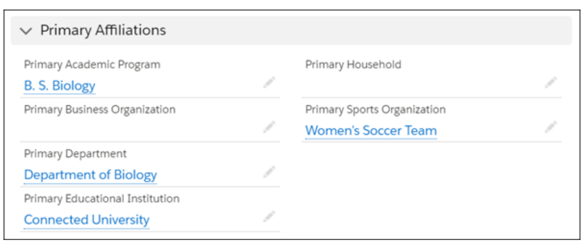
On a Contact record, look in the Affiliated Accounts related list to see Affiliations.

For details, including an indication of which ones are Primary Affiliations, click **View All** to go to the list view (or click the Affiliated Accounts related list heading).



View a Contact's Primary Affiliations

On a Contact record, look in the Primary Affiliations section to see the special subset of Affiliations that are considered primary. Primary Affiliations are organised by record type–Primary Academic Program, Primary Department, Primary Business Organisation, and so on. The exact fields and layout depend on your org's configuration.



Application

Application stores information about a student's application to an educational institution or programme.

Sample Uses for Application

Track information about a prospective student's application to your institution, from submittal through decision. Generate reports to see the characteristics of your applicant pool.

Let's look at some possible uses for the Application object.

- University–Identify the academic programme or major and the type of programme (for example, graduate or undergraduate) an applicant has applied to.
- K-12–Identify the person preparing the application and that person's relationship to the student.
- Any educational institution–Determine an application's status (for example, Incomplete, In Review, Waitlist, etc.) and track important milestones.

Configure Application

Consider these updates, depending on which version of EDA you originally installed.

If Installed Before Version	Configuration Task
1.91	To implement the newly added Application object, customise the Application page layout, related lists, and list views, if needed. For more information, see Display a New Custom Object After a Product Release.
1.94	Add the Admit with Conditions picklist value, to the Application Status field on Application. For information, see Add Custom Fields and Picklist Values.
	• If needed, create a K-12 All Applications list view with this configuration. – Sharing Settings: All users can see this list view – Filter by Owner: All attributes – Filter by Owner: All attributes Display order: Application Name, Applicant, Applying To, Term, Application Type, Application Status, Application Date, Application Decision Date, Applicant Decision Date, Preparer. See Create or Clone a List View.
1.103	To track the date applicants initially created their applications, add the Initial Creation Date field to the Application page layout. Learn about updating page layouts in Display a New Custom Object After a Product Release.
1.116	Add these fields to the EDA Application Layout, as needed: Open Date and Due Date. For more information, see Display a New Custom Object After a Product Release.

If Installed Before Version	Configuration Task
1.117	• Add the Started picklist value to the EDA Application Layout, as needed. For more information, see Add Custom Fields and Picklist Values. • If you started with a version of EDA before 1.117 and want to make the Application setting visible in EDA Settings, grant Apex class access to ApplicationSettingsController for all profiles and permission sets as needed. For more information, see Enable EDA Apex Class Access.

Create an Application Record

Before you create an Application, you must set up an Account that you can relate it. For example, an Account that represents the entire school or a programme within a school.

1. If the Contact record has an Applications related list, click **New** in the related list. If not, from the App Launcher, find and select **Applications**, and click **New**.
2. (K-12 only) In most cases, you're creating an Application for a student, so on the New Application page, click **Student**, then click **Next**.
3. In the Contact field, select an existing Contact or click **New Contact**.
4. Enter all relevant details for your new Contact, but *leave the Account Name field blank* to ensure that the required Administrative or Household Account is created. Click **Save**.
5. Enter all relevant Application details and specify the academic program or major the applicant is applying to. For example, you might choose an Account that has an Educational Institution, Academic Program, or custom record type. Fill in optional fields as needed.
6. Click **Save**. Or, if you're creating multiple Application records, click **Save & New**.

Tip
As a next step, create Test records to track the tests this applicant has completed and Test Score records to track the results. See Test.

Attendance Event

Attendance Event represents information about a student's attendance.

Sample Uses for Attendance Event

Changes in a student's attendance might indicate that something's going on in their life that could affect their educational success. For example, consistent tardiness or absence is an early warning indicator that a student might need intervention to stay on track to pass a course or graduation. The Attendance Event object can be used to track attendance.

- University–Track the number of days and reasons that a student's missed a specific course.
- K-12–Track a student's tardiness or absence for a class period or an entire day and the reasons.
- Any educational institution–Determine a student's total participation during a term. Generate reports on the frequency of such events.

Configure Attendance Event

Consider these updates, depending on which version of EDA you originally installed.

Keep Up with Attendance Event Updates

If Installed Before Version	Configuration Task
1.78	• Add the Attendance Events related list to your Contact and Course Connection page layouts. • Customise the related list, list views, and compact layouts, if needed. Learn about updating layouts in Display a New Custom Object After a Product Release.

Create an Attendance Event Record

Create an attendance event record from a student's contact record.

1. From the student's Contact record, click **New** in the Attendance Events related list.
2. Enter a date for the tardy or absence. Don't change the Contact name.
3. Fill in optional fields as needed.
4. Click **Save**.

Attribute

Attribute represents characteristics that apply to individual students and credentials earned by students and faculty (or other Contacts).

Sample Uses for Attribute

Knowing whether a faculty member has the proper credentials to teach a course or knowing whether a student has characteristics that might require additional support can improve your institution's delivery of services.

The Attribute object can be used to track these types of metrics:

- University–With the Credential record type, track the agency and expiration date of a law professor's State Bar Association licence.
- K-12–Track characteristics like whether a student is in foster care or qualifies for free lunch, or whether a faculty member has a Multiple Subject Teaching Credential.
- Any educational institution–Track student characteristics like special-needs accommodations.

Configure Attribute

Keep the Attribute object up to date.

Keep Up with Attribute Updates

Consider these updates, depending on which version of EDA you originally installed:

If Installed Before Version	Configuration Task
1.118	• Add the following fields to your page layouts, as needed. – Activity End Date – Activity Start Date – Credential – Credential Number – Credentialling Identifier – Role – Status – Verification Status – Verification Status Date For more information, see Add Custom Fields and Picklist Values.
1.78	Add the Attributes related list to your Contact page layouts. Learn about updating page layouts in Display a New Custom Object After a Product Release.

Attribute Record Types

Track student credentials and characteristics by using Attribute record types.

- **Credential**–Allows educational institutions to track licences, certifications, or endorsements earned by staff or students.
- **Student Characteristic**–Allows educational institutions to track important student characteristics that might affect students' education.

Tip
To track something that is neither a credential nor a student characteristic, add your own record type to the Attribute object to track other traits. For example, create an Honour record type for students who are on the Dean's List or graduating ***Magna Cum Laude***.

Create an Attribute Record

Use these steps to create an attribute record in EDA.

1. From the student or faculty member’s Contact record, click **New** in the Attributes related list.
2. Select the record type for a credential or a student characteristic and click **Next**.
3. Enter an Attribute Name to identify this Attribute record in page layouts, related lists, and searches. Don’t change the Contact name.
4. Fill in optional fields as needed.
5. Click **Save**.

Behaviour Involvement

Behaviour Involvement lets you associate individuals with a behaviour event that's tracked as a Case.

Sample Uses for Behaviour Involvement

Understanding a student or faculty member's role in a behaviour event can help you develop appropriate responses. The Behaviour Involvement object can help you track behaviour events.

- University–Track involvement of a student who might be the victim of a theft, a room mate who might be a perpetrator of the theft, and a Resident Advisor who might be a witness or reporter of the theft.
- K-12–Track involvement of a student who might be the victim of a bullying incident, another student who might be the perpetrator, and a faculty member who might be a witness or reporter of the incident.
- Any educational institution–Track the frequency of a certain person’s involvement in behaviour events or the frequency of certain types of events at your institution.

Configure Behaviour Involvement

Keep the Behavior Involvement object up to date.

Keep Up with Behaviour Involvement Updates

Consider these updates, depending on which version of EDA you originally installed:

If Installed Before Version	Configuration Task
1.83	• Manually add the Behaviour Involvements related list to the Contact page layout and Case page layout (for the Incident record type). Learn about updating page layouts in Display a New Custom Object After a Product Release. • Configure Case and Behaviour Response as described in Configure Case and Configure Behaviour Response.

Create a Behaviour Involvement Record

Use these steps to create a behaviour involvement record in EDA.

Before you create a Behaviour Involvement record, first create a Case record. See Case .

1. From the Case record for this event, click **New** in the Behaviour Involvement related list.
2. Enter a Contact name and the person's Role in the event. Don’t change the Case Number.
3. Click **Save & New** to create a Behaviour Involvement record for each person involved in the incident, or click **Save** after you've entered the last person involved.

Tip
As a next step, create Behaviour Response records to track post-incident actions for the people involved. See Behaviour Response .

Behaviour Response

Behaviour Response helps you track corrective actions and other responses to behaviour events.

Sample Uses for Behaviour Response

Tracking responses to specific Behaviour Involvements, and their statuses, helps ensure that reported behaviour events are addressed.

- University–Track the referral of an incident involving a student to authorities for a state offence, like a car accident on campus.
- K-12–Track the probation period for a student whose action, for example bullying, goes against the school’s code of conduct.

- Any educational institution–Track the number of a certain type of response (for example, expulsions or probations) or the number of responses that are in progress or have been completed.

Configure Behaviour Response

Consider these updates, depending on which version of EDA you originally installed.

If Installed Before Version	Configuration Task
1.83	• Manually add the Behaviour Responses related list to your page layouts. Learn about updating page layouts in Display a New Custom Object After a Product Release. • Configure Case and Behaviour Involvement as described in Configure Case and Configure Behaviour Involvement.

Create a Behaviour Response Record

Create a behaviour response record from a behaviour involvement record.

Before you create a Behaviour Response record, create a Behaviour Involvement record.

1. From the Behaviour Involvement record for the behaviour event, click **New** in the Behaviour Response related list.
2. Enter the Type of response that resulted from the event. Don't change the Behaviour Involvement ID.
3. Fill in optional fields as needed.
4. Click **Save**.

See Also

Behaviour Involvement

Case

Case represents a behaviour event and can have related Behaviour Involvement records.

Sample Uses for Case

The Case object is used differently in EDA than it's used in standard Salesforce. It includes two fields that are unique to EDA that help you track behaviour events. Category tracks the type of event, such as a code of conduct violation or other type of school violation. Location tracks where the event occurred, such as on campus or off campus.

Let's look at some possible uses for the Case object.

- University–Track the theft of personal property from a dorm room.
- K-12–Track a bullying incident on a school bus.
- Any educational institution–Track a breach in code of conduct.

Configure Case

Keep the Case object up to date.

Keep Up with Case Updates

Consider these updates, depending on which version of EDA you originally installed:

If Installed Before Version	Configuration Task
1.83	If you're already using Cases, but haven't yet set up a default record type: 1. Create a default support process for Case. See Create Multiple Business Processes. 2. Create a default record type for Case, selecting the new process you just created. See Create Record Types. 3. Apply the newly created record type to existing Case records. 4. Ensure the appropriate permissions are set for the new record type for all required profiles.
	Also consider these updates: • Manually add the Behaviour Involvements and Behaviour Responses related lists to your page layouts. For more information, see Display a New Custom Object After a Product Release. • Manually add the Behaviour Management support process and Incident record type to the Case object. See Create Multiple Business Processes and Create Record Types.

Create a Case Record for a Behaviour Event

Use these steps to create a case record for a behaviour event in EDA.

1. Click the **Cases** tab. If you don't see the Cases tab, from the App Launcher, find and select **Cases**, and click **New**.
2. Enter the Occurrence Date, Category, and Status for the behaviour event. You don’t have to relate a Case with a particular Contact at this time. You’ll use Behaviour Involvement records to relate people to the behaviour event (Case) later.
3. Fill in optional fields as needed.

4. Click **Save**.

> **Tip**
> As a next step, create Behaviour Involvement records to track the individual people involved in this behaviour event. See Behaviour Involvement .

Contact

A Contact represents an individual person.

Sample Uses for Contact

The Contact object represents the people at the heart of educational institutions. These folks include students, students' family members, faculty, staff, administrators, community members, and so on. Contact is a standard Salesforce object, augmented with education-specific fields and, in the case of K-12 Architecture Kit, record types, to help you develop a 360-degree view of your campus community.

- University–Track who's a financial aid applicant, or who's served in the military.
- K-12–Distinguish student Contacts from faculty or guardian Contacts.
- Any educational institution–Track who has dual citizenship, whose records contain HIPAA-protected information, or who has opted out of FERPA disclosure.

Contact Record Types

Because a Contact can play multiple roles at once–an alumni of one program, a current student in another program, a tutor, and also a sports team member–we don't provide record types out of the box. Creating custom record types that don’t conflict with each other can be tricky, so in general, we don’t recommend it. If you do create them, make sure they're for Contacts for whom only one record type applies. To track a Contact's roles with various organisational entities, consider creating Affiliation records instead.

Configure Contact

Set up initial Contact data for your educational institution and learn about the steps required to maintain the data.

Initial Configuration for Contact

It's essential to understand how to manage Contact data and configure related settings. Review these resources to make sure you have the full picture.

- Configure Contacts' Email Addresses and Phone Numbers
- Configure Address Settings
- Configure Relationships Settings

- Configure Affiliations Settings
- Various Table-Driven Trigger Management (TDTM) rules control the creation, update, and deletion of Contact records and related records. Review the classes affecting the Contact object in Apex Class Descriptions for EDA.

Keep Up with Contact Updates

Consider these updates, depending on which version of EDA you originally installed.

> **Tip**
> As with all objects, verify and customise the security settings, navigation, and layouts for Contact, as needed. Follow the general instructions in Display a New Custom Object After a Product Release, keeping in mind that you're editing settings for a standard object rather than a custom object.

If Installed Before Version	Configuration Task
1.118	• Add the following fields to your Contact page layouts, as needed. – Disability Status – SMS Opt Out – Mailing Address Inactive • Create a custom field for Credentialling Identifier and add it to your page layouts, as needed. See Model Certifications and Credentials. For more information, see Add Custom Fields and Picklist Values.
1.110	Add the picklist value, Temporary Resident, to the Citizenship Status field on Contact.
1.104	Add the picklist value, Decline to State, to the Gender field.
1.101	Add these Address-related fields to Contact page layouts, as needed: Mailing County and Other County. Add these identification fields, as needed: Former First Name, Former Middle Name, Former Last Name, and Date Deceased. Add the Citizenship Status picklist. Possible values include: U.S. Citizen or U.S. National; U.S. Dual Citizen; U.S. Permanent Resident; U.S. Refugee or Asylee; Other (Non-U.S.).

If Installed Before Version	Configuration Task
1.89	Add the picklist values documented in Configure Contacts' Email Addresses and Phone Numbers to the appropriate Contact fields.
1.85	Add the Term Grades related list to Contact page layouts, as needed and if not preconfigured.
1.83	Add the Behaviour Involvements related list to Contact page layouts, as needed.
1.78	Add the Attributes related list to Contact page layouts, as needed.
1.72	Add the Contact Languages related list to Contact page layouts, as needed.
1.57	Update Contact page layouts that show the Programme Enrolments related list to also show the Programme Plan field.
1.28	We added the Race field to EDA in version 1.28 to manage all ethnicity settings except Not Hispanic or Latino and Hispanic or Latino. If you used the Ethnicity field before then, use the batch job in EDA Settings to copy standard picklist or custom values except Not Hispanic or Latino and Hispanic or Latino from the legacy Ethnicity field to the Race field. Before running the batch job: • Add `Not Hispanic or Latino` as a picklist value to the Ethnicity field. • Add `Hispanic or Latino` as a picklist value to the Ethnicity field. After running the batch job: • If your org had custom picklist values for the Ethnicity field, copy them to the Race field. • Remove all picklist values from the Ethnicity field except for Hispanic or Latino and Not Hispanic or Latino. We recommend that you replace each removed value with a value from Race, rather than deleting them outright from existing records. • If reports or formula fields reference the values in the Ethnicity field, update them.
1.14	After enabling multi-addresses for Contacts, add the Addresses related list to the HEDA Contact layout.

Create a Contact Record

Represent people such as students, family members, staff, and more, by creating Contact records.

1. Click the Contacts tab and click **New**. If you don't see the Contacts tab, from the App Launcher (⋮⋮⋮), find and select Contacts, and click **New**.
2. Enter relevant details, including Social Security Number, phone numbers, emails, addresses, chosen full name, and so on.

> **Important**
> Pay close attention to the Account Name field. Depending on the type of Contact you're creating, sometimes you fill it in and sometimes you leave it blank so that EDA can automatically create the container Account record for you when the Contact record is saved.

Default Account Model	Type of New Contact	How to Handle the Account Name Field
Administrative Account	A student or anyone requiring a container Administrative Account (for some institutions, applies to faculty, staff, and administrators)	Leave it blank.
Household Account	A student or anyone requiring a container Household Account (such as another household member)	Leave it blank unless the household has an existing Account record. If the household Account was created with a previously created Contact record, start typing the Account name in the field, then select it when you see it suggested.
Either Administrative or Household Account	Anyone not requiring a container Account, such as faculty, staff, and administrators employed by the institution (if not using container Accounts for these types of Contacts) or a community member who's part of a business or organisation	Don't leave it blank. Start typing the related Account name in the field (such as the educational institution, a department, a campus organisation, and so on), then select it when you see it suggested. If the Account record doesn't exist yet, create it and specify it as the Account Name.
Either Administrative or Household Account	Anyone requiring a different container Account type than the default account model	Don't leave it blank. If a container Account record of the required type doesn't already exist, create it and specify it as the Account Name.

3. When you're finished, click **Save**.

Note
If you've created a Contact that has a container Administrative Account and you want to also track their membership in a household, you can't use a container Household Account but you can use an Affiliation. From the student's Contact record, in the Affiliated Accounts related list, create an Affiliation record to relate the Contact to the household's Account record. See Create an Affiliation Record.

Things to Know About Maintaining Contact Data

Review considerations for how to maintain Contact data for your educational institution.

Account and Contact data are tightly coupled. Updating data for a Contact that has a container Account, such as recording a name change or change of household, can trigger automatic changes to the name of the Contact's container Account. The specifics depend on your org's configuration. For details, see Customize Administrative and Household Account Names.

Contact Language

Contact Language represents a language spoken by someone connected to your institution.

Sample Uses for Contact Language

Tracking the languages that are spoken by students, staff, and parents–as well as their fluency in each–goes a long way to creating an inclusive environment where people can get support and communication in their preferred languages. Because a Contact can be any type of individual, you have a lot of flexibility in the type of data you track.

- University–Track the primary language for a student, but then identify an intermediate-level language because she's studying it.
- International university–Track an instructor's fluency in multiple languages, for staffing courses taught in multiple countries.
- K-12–Identify the primary language for a student’s guardian to ensure that communication sent to the family is in their preferred language.

Configure Contact Language

Consider these updates, depending on which version of EDA you originally installed.

Keep Up with Contact Language Updates

If Installed Before Version	Configuration Task
1.72	**Page Layout:** • Add the Contact Languages related list to your Contact page layout. • Add the Primary Language field to the Contact page layout. We recommend you add this field as read-only, as it's populated by the value specified in the Contact Language record when the Primary Language checkbox is selected. Learn about updating page layouts in Display a New Custom Object After a Product Release.
	Automation: • If you don’t want the Primary Language field on the Contact object to be populated by default, disable the CLAN_PrimaryLanguage_TDTM trigger. • If you don’t want Contact Language records to be created or updated automatically when users update the Primary Language field on the Contact object, disable the CON_PrimaryLanguage_TDTM trigger.

Create a Contact Language Record

Create a contact language record from the Contact Languages related list on the contact record.

Before you create a Contact Language record, create Language records to represent the languages recognised by your institution so you can relate Contacts to them. See Language .

1. From the Contact record you’re updating with Language information, click **New** in the Contact Languages related list.
2. Select a language spoken by the Contact, indicate the fluency, and specify whether it’s the Contact’s primary language. Don’t change the Contact name.

   > **Note**
   > When you specify a language as primary, the language you choose appears in the Primary Language field on the Contact record.

3. Click **Save**.

Course

Course represents an academic course, typically offered periodically by an Account entity, such as a department or school.

Sample Uses for Course

A Course is an instance of a class that's offered at your educational institution and is typically related to the Account that offers it.

For example:

- University or high school–The related Account often has the Academic Department record type, such as the English Department Account.
- K-12–The related Account often has the Educational Institution record type, such as the school's Account.

While a Course is, in practice, often related to multiple Academic Programs (an Academic Programme being a type of Account), each Course record is technically associated with only one Account. The type of related Account can vary by institution.

Note

A Course is not the same thing as a Course Offering. A Course is ***any*** instance of a class, while a Course Offering is a ***specific*** instance of that Course, usually tied to a Term. For example, every fall term, the English Department (Account) might offer a Course called British Literature 100. The Course itself is distinct from the Course Offering, which represents a single occurrence of British Literature 100 during a specific Term.

Keep Up with Course Updates

Consider these updates, depending on which version of EDA you originally installed.

If Installed Before Version	Configuration Task
1.118	• Add these fields to your page layouts, as needed. – Academic Level – Credentialling Identifier – Issuer – Subject For more information, see Add Custom Picklist Values.

Create a Course Record

Before you create Course records, first create their related Account records, representing the school or department most closely associated with a Course.

1. From the Account record for the entity that's related to the Course, click **New** in the Courses related list.
2. Enter the Course Name. Don't change the Department name.
3. Fill in optional fields as needed. Note that the Course ID (for example, ENG-211) can be a helpful text value for representing Courses in a course catalogue.
4. Click **Save**.

Tip
As a next step, create Course Offering records so that you're ready to enrolment students in the Course (create Course Connection records).

Course Connection

Course Connection represents a relationship between a Contact, such as a student or faculty member, and a Course Offering.

Sample Uses for Course Connection

The Course Connection object is used similarly in both K-12 and higher education.

- Any educational institution–Track a student's enrolments in completed and in-progress Course Offerings. Track a faculty member's involvement with Course Offerings as an instructor, advisor, or other role.

Course Connection Record Types

If your version of software doesn't include these record types, you can either run the installer or create them manually.

- **Student**–Tracks a student's enrolment in a Course Offering.
- **Faculty**–Tracks a faculty member's involvement with a Course Offering.

Note
If your software version includes the preconfigured Student and Faculty record types, it also includes an additional record type, called Default. The Default record type isn't needed for Course Connections to function. To prevent confusion, we recommend hiding it from all user profiles except the System Administrator profile.

1. Click ⚙, then click **Setup**.
2. Search for then select **Profiles**.
3. For each profile that interacts with Course Connection record types, edit the profile's Record Type Settings for Course Connections to make sure that Default is not one of the Selected Record Types.

See Create Course Connection Record Types.

Configure Course Connection

Get ready to use the Course Connection object and keep it up to date.

Course Connections are enabled by default in most orgs and the following configuration doesn't apply. However, if they're not enabled in your org, or if you started using EDA with version 1.15 and the now-retired Course Enrolment object is enabled, we recommend that you complete these configuration steps to enable Course Connections.

- Create Course Connection Record Types
- Enable Course Connections
- Set Record Types for Course Connections
- Update Legacy Course Enrolment Data

> **Note**
> We encourage you to enable Course Connections, but if you don't, you can continue using Course Enrolments without record types. Whichever method you use, Course Enrolments are renamed Course Connections in all orgs.

Keep Up with Course Connection Updates

Consider these updates, depending on which version of EDA you originally installed.

If installed Before Version	Configuration Task
1.118	• Add these fields to your page layouts, as needed. – Credentialling Identifier – Verification Status – Verification Status Date – Display Grade • Add these picklist values to the Status picklist. – In Progress – Completed – Enrolled – Failed – On Hold – Withdrew – Audited For more information, see Add Custom Fields and Picklist Values.

Create Course Connection Record Types

The installer creates a Student record type and a Faculty record type for Course Connections, but you can also create your own record types.

For example, you might want to create a Teaching Assistant record type. At a minimum, you must have one record type for students and one for faculty.

> **Note**
> If you've already created your own student and faculty record types, you don't need to add more. Simply map them to the Default Student Record Type and Default Faculty Record Type in Course Connection Record Types in EDA Settings (see Set Record Types for Course Connections).

To access the management settings for Course Connection record types:

1. Click , then click **Setup**.
2. Click **Object Manager**.
3. Click **Course Connection**, then click **Record Types**.
4. Create both required record types. For details, see Create Record Types in Salesforce Help.

Enable Course Connections

After verifying that you have student and faculty record types, you're ready to enable Course Connections.

1. In EDA Settings, select **Course Connection Record Types**.
2. If Course Connection Record Types isn't enabled, click **Edit**, turn it on, and click **Save**.

Set Record Types for Course Connections

When Course Connections are enabled, specify the record type that's used for each type of Course Connection, one each for student and faculty member.

1. In EDA Settings, select **Course Connection Record Types**.
2. Click **Edit**.
3. In Default Student Record Type, select **Student** or a custom record type of your choosing.
4. In Default Faculty Record Type, select **Faculty** or a custom record type.
5. Save your changes.

Update Legacy Course Enrolment Data

If you're turning on Course Connections for the first time in an org where Course Offerings and Course Connections (Enrolments) previously existed, update Course Connections with the appropriate record types. Updating faculty Course Connections to the value in Default Faculty Record Type and all other Course Connections to the value in Default Student Record Type enables automation, such as the assignment of Primary Faculty on Course Offering records, to occur.

1. In EDA Settings, select **Legacy Course Enrolment Data**.
2. Click **Update**.
3. In the confirmation window, click **Update**.

Create a Course Connection Record

Before you create a Course Connection record, create the Contact and Course Offering records that are connected by the Course Connection.

1. From the Contact record for the student or faculty member that you're creating a Course Connection for, click **New** in the Course Connections related list.

   > **Tip**
   > You can instead create the Course Connection from the Contact's Program Enrolment record. Creating it there makes sure that the Program Enrolment ID

is automatically populated. Otherwise, look up the Program Enrolment ID on the Contact's Program Enrolments related list and keep it handy.

2. Select the Student or Faculty record type (or one of your org's custom record types).
3. Enter Course Connection details. Don't change the Contact name.
4. If the Course Connection is for a faculty member, select **Primary** if the Contact should be the main faculty member for the related Course Offering. The Primary checkbox applies only for connections with the Faculty record type. Selecting Primary for a new Contact removes the Primary status from a previously selected primary Contact, but leaves that Contact's Course Connection and Affiliation records intact.

   Note
   If the Primary status of a Course Connection changes, the Status field doesn't update from Current to Former. To change Course Connections that were previously marked as Primary to reflect a Status of Former, you need to create custom automation.

5. Save your changes.

The newly created Course Connection now shows on the Contact record.

Course Offering

Course Offering represents a specific instance of a Course that's offered during a specific Term.

Sample Uses for Course Offering

A Course like ***Introduction to Statistics*** is often offered on a recurring basis, such as every fall semester. A Course Offering like ***Introduction to Statistics - Fall 2020*** might appear as an entry in the course catalogue of courses available in the ***Fall 2020*** Term.

- Any educational institution–Track each discrete offering of Courses, term by term.

A Course Offering is always related to a Term. Other commonly related records are Course Offering Schedule, Course Connection, and Facility records.

Configure Course Offering

Keep the Course Offering object up to date.

Keep Up with Course Offering Updates

If you intend to track the physical locations of Course Offerings by relating them to Facility records, add the Facility field to your Course Offering page layout. The Facility field is not included by default.

Create a Course Offering Record

Before creating Course Offering records, make sure you've created the Course and Term records they're related to.

1. From the Course record, click **New** in the Course Offerings related list.
2. Select a Term or click **+ New Term** to create a new one.
3. Enter the Course Offering ID, which should match the ID naming format that your institution uses.
4. If you select a faculty member in the Primary Faculty field, we automatically create a Course Connection record for that faculty member. The faculty member is also marked as Primary on the Course Connection.
5. Fill in other details as needed. Only select a Time Block if you aren't going to relate a Course Offering Schedule to this Course Offering. See Create Time Block Records for information about using these settings correctly.
6. Click **Save**.

Course Offering Schedule

Course Offering Schedule relates a Course Offering with a Time Block, allowing for class schedule variations in the locations and days of a specific offering.

Sample Uses for Course Offering Schedule

Course Offering doesn't always meet at the same time or in the same place every day of the Term. You can use the Course Offering Schedule junction object, often with the Time Block object, to track such variations by relating the Course Offering with multiple schedules.

- University–Track the daily variation in locations and times of next quarter's offering of Chem 102: Mondays, Wednesdays, and Fridays from 1-2 PM in Lecture Hall A, and Tuesdays and Thursdays 2-3:30 PM in the adjacent lab facility. In this case you'd create a Course Offering Schedule for the first group of classes and another Course Offering Schedule for the labs, and both Course Offering Schedules would look up to the same Course Offering.
- K-12–Track alternating schedules, with one set of classes on "A" days and another set of classes on "B" days, and class schedules rotating between A and B days on a certain time cycle. Course Offering Schedules can be configured along with Time Blocks to

accommodate A/B blocks with standard periods, with flex days and times, and the many other variations found in middle and high schools.

> **Tip**
> If your class schedule follows a simple Monday through Friday routine, without alternating days or more complex schedule requirements, you likely don't need to use the Course Offering Schedule object. You can simply use a combination of Course Offering, Time Block, and Facility (if needed) to model your class schedule.

Configure Course Offering Schedule

Consider these updates, depending on which version of EDA you originally installed.

If Installed Before Version	Configuration Task
1.74	Add the Course Offering Schedules related list to your Course Offering page layout.

Create a Course Offering Schedule Record

Create Course Offering Schedule records to represent the variations in a class schedule (locations, days of the week, times of day) for a Course Offering during a specific Term.

By definition, a Course Offering Schedule is always related to a Course Offering. You can expect to create multiple Course Offering Schedule records to represent a course being offered on different days of the week, in different locations, and during different blocks of time.

1. From the Course Offering record, click **New** in the Course Offering Schedules related list.
2. Fill in details as needed to account for one unique combination of location, days of week, and times of day for a given class schedule. Don't change the Course Offering.

   > **Tip**
   > Choose to use either the Start and End Time fields, or the Time Block field–but not both.

3. Click **Save & New** to create additional records for additional combinations, or click **Save** after you've entered the last combination.

> **Note**
> See Create Time Block Records for information about using Time Blocks with Course Offering Schedules.

Credential

Track student achievements, such as badges, certifications, or licences.

Sample Uses for Credential

Students can earn achievements, beyond just completing a set of courses, that help give a fuller picture of their education. You can use the Credential object to define the various achievements that learners earn.

- University–Define badges and certifications that your institution offers or would like to track for your students such as professional certifications related to a student's program.
- K-12–Define awards and certifications from extracurricular activities for letters of recommendation or for scholarship applications.

Credential Record Types

Credential represents an industry or organisational achievement. These record types come preconfigured.

- Badge–A symbol of achievement.
- Certification–A non-credit certification that indicates that the learner has met specified requirements.
- Licence–A credential indicating a person is licensed for certain activities.

Keep Up with Credential Updates

Consider these updates, depending on which version of EDA you originally installed.

If Installed Before Version	Configuration Task
1.118	Add the Credential related list to the appropriate Account page layouts. Learn about updating page layouts in Display a New Custom Object After a Product Release.

Create a Credential Record

Capture students' achievements by creating Credential records.

1. If the Contact record has a Credential related list, click New. If not, from the App Launcher, find and select **Credential**, and click **New**.
2. Select a record type and click **Next**.
3. Enter all relevant details.
4. Click **Save**. Or click **Save & New** to create another Credential record.

Education History

Education History stores information about a Contact's education history and related data.

Sample Uses for Education History

Understanding a student's previous educational experience plays an important role in the recruiting and admissions process, but also has other uses.

- University–Track alumni historical data for targeted mentorship or donation programmes.
- K-12–Track the time a student's spent at other schools.
- Any educational institution–Track a student's educational history to help guide their educational decisions.

Configure Education History

Consider these updates, depending on which version of EDA you originally installed.

If Installed Before Version	Configuration Task
1.118	• Add these fields to your page layouts, as needed. – Academic Certification – Credentialling Identifier – Credits Earned – Status – Verification Status – Verification Status Date For more information, see Add Custom Fields and Picklist Values.
1.103	• Add the Education History related list to your Contact page layouts. • Add these fields to your page layouts, as needed. – Account layout: School Code – Application layout: Initial Creation Date Learn about updating page layouts in Display a New Custom Object After a Product Release.

Create an Education History Record

Create an education history record from the Education History object or from the Education Histories related list on a contact record.

Before you create an Education History record, you must first have a Contact to relate the record to.

1. If the Contact record has an Education History related list, click **New** in the related list. If not, from the App Launcher, find and select Education History, and click **New**.
2. In the Educational Institution Account field, select an existing Account or click **New Account**.
3. Enter all relevant details.
4. Click **Save**. Or click **Save & New** to create another Education History record.

Facility

Facility represents a school property asset.

Sample Uses for Facility

The location of a class or other property asset can be helpful when scheduling classes or other school activities. A Facility can be a classroom, a lecture hall, a laboratory, or a campus building that doesn't directly host student activity (for example, maintenance or IT facilities). Facility records can also be used to define relationships between property assets.

For example, you could create a parent Facility record for the “Smith Science Building” with nested Facility records for the “East Wing” and “Lecture Hall 103.”

Facility can also help you relate Contacts to campus locations if you include the Contact lookup field on Facility. Let’s look at some possible uses for the Facility object.

- University–Relate a faculty member to an office or a student to a dorm room.
- K-12–Relate a faculty member to a specific classroom.
- Any educational institution–Relate a Course Offering to a classroom or lecture hall.

Tip

Consider these changes to use Facility in other ways.

- To identify a specific Contact as the point of contact for a Facility, add a lookup field on Facility to Contact.
- To track address information directly on the Facility object, add your own address fields to the Facility object.
- Customise the Display Name unmanaged formula field to match the naming format used by your school.

Configure Facility

Set up the Facility object and keep it up to date.

Initial Configuration Tasks

Add the Display Name formula field to the Facility page layout so you can see the full name of the Facility. Also include the field in any needed search layouts. Learn about updating page layouts in Display a New Custom Object After a Product Release.

If you installed EDA prior to version 1.73, follow the instructions in the table below to create the formula field before adding it to your page and search layouts.

Keep Up with Facility Updates

Consider these updates, depending on which version of EDA you originally installed:

<table>
<tr><th>If Installed Before Version</th><th>Configuration Task</th></tr>
<tr><td>1.73</td><td>Add the Facility field to the Course Offering page layout.</td></tr>
<tr><td></td><td>Create the Display Name formula field:

Create a formula field on the Facility object. For information about creating formula fields, see Build a Formula Field in Salesforce help.
Paste the following code into the formula section:
<pre>
IF(

 NOT(ISBLANK(hed__Parent_Facility__c)),
    hed__Parent_Facility__r.Name +
 ' - ' + Name,
    IF(

 NOT(ISBLANK(hed__Account__c)),
        hed__Account__r.Name + ' -
 ' + Name,
        Name
)
)
</pre>
Add the field to the Facility Layout and any needed search layouts.

For more information, see Display a New Custom Object After a Product Release</td></tr>
</table>

Create Facility Records

Create Facility records for every location you want to track at your school. Typically, you create multiple records when you first start implementing Facility data.

1. Go to the Facilities tab and click **New**. If you don't see the tab, from the App Launcher, find and select **Facilities**, and click **New**.

2. Enter a Facility Name, relate it to the Account that represents the organisation that is responsible for the Facility, and specify other information like the capacity and whether it's part of a larger (parent) facility.

> **Tip**
> Once the record is saved, the Display Name formula field shows the full Facility name. For example:
>
> - Facility Name is "Room 201"
> - Parent Facility is "Thurgood Marshall Building"
> - Display Name is "Thurgood Marshall Building - Room 201"
>
> If no value is defined for Parent Facility, the value for Account is used. If neither Parent Facility nor Account is defined, the values for Facility Name and Display Name are the same.
>
> See Configure Facility for more information on adding Display Name to the page layout.

3. Click **Save & New**, and continue creating additional Facility records as needed.

Language

Language represents a language spoken at your institution.

Sample Uses for Language

Your institution might track the languages spoken by students and faculty, languages Courses are taught in, or languages that students are learning.

- University–Track languages offered as Courses at your institution.
- International university–Track languages spoken by faculty, especially if courses are taught in multiple countries or in populations with more than one dominant language.
- K-12–Track the preferred language of students' households or guardians.

Configure Language

Consider these configuration changes, depending on your use of Language in EDA.

- To track the language a course is taught in, add a Language lookup field to the Course Offering page layout.
- To track the language used in a household, add a Language lookup field to the Household Account page layout.

For more information, see Display a New Custom Object After a Product Release and Add a Lookup Field to a Page Layout .

Create Language Records

Create Language records for every language recognised by your school. All of the languages you enter are available from the Language lookup field that you can add to your page layouts.

1. Go to the Languages tab and click **New**. If you don't see the tab, from the App Launcher, find and select **Languages**, and click **New**.
2. On the New Language page, enter the name of a language and click **Save & New**.

> **Tip**
> As a next step, create Contact Language records to relate a Language with its speakers. See Contact Language.

Lead

Lead represents a potential student to an educational institution or programme.

Sample Uses for Lead

Recruiting and admissions teams typically track two types of potential students about whom little is known–suspects and prospects.

Suspects haven't yet signalled interest in your institution while prospects have. In EDA , we recommend using Leads to represent suspects, and Contacts to represent prospects. When suspects become prospects, you can convert their Lead records to Contact, Account, and Opportunity records.

Here's how some institutions use Leads in a recruiting context.

- University–Track suspects, perhaps gathered from a list provided by a testing service or recruiting event, who are good candidates for your marketing efforts.
- K-12–For private and charter schools, use Leads to personalise interactions and narrow the field of suspects.

Leads are an excellent way to track prospects at the top of your recruiting funnel. Using Leads instead of Contacts when a potential student's data first enters EDA gives you many advantages, such as native Lead scoring and personalised marketing campaigns that allow you to better track and report demonstrated interest. Separating Leads from the Contacts who are invested in your institution keeps your data clean and your marketing precise.

> **Note**
> If you'd like to use Leads for prospects too, that's fine. Just make sure that your institution has clear guidelines for converting a prospect to a Contact. Keep in mind that you can't use EDA's custom objects or features until the Lead record is converted.

Lead Record Types

Create leads record types for your institution if required. EDA doesn't provide any record types for Leads.

Configure Lead

Set up and maintain the Lead object in EDA.

Initial Configuration for Lead

It's essential to understand how to configure Lead-related settings and processes in Salesforce before you create Lead data in EDA. Understanding how EDA creates and names Accounts for converted Leads is critical. Review these resources to make sure you have the full picture.

- Configure Lead Settings
- Customise Administrative and Household Account Names
- A Table-Driven Trigger Management (TDTM) rule controls the naming of Account records created during Lead conversion. For more information, see Apex Class Descriptions for EDA.

Keep Up with Lead Updates

Consider these updates, depending on which version of EDA you originally installed.

If Installed Before Version	Configuration Task
1.114 (Summer '21)	• To manage the Automatically Rename Lead-Converted Accounts setting from EDA Settings, see Education Cloud Settings.

Create Lead Records

Create leads in EDA by importing them or by using automation, or manually create a lead from the Lead object.

> **Important**
> Remember that when you convert a Lead, its fields are used to populate the Account, Contact, and Opportunity records. Before creating and converting Leads, learn about the settings that impact Lead-converted Account names in Configure Accounts Created During Lead Conversion. Also review how the standard Lead

fields are mapped to the Account, Contact, and Opportunity fields in Lead Conversion Field Mapping in Salesforce Help.

Create Lead Records with Import or Automation

Most institutions create Leads by importing a list of suspect data. For detailed import considerations, see Recommended Data Import Sequence for EDA.

If your website includes an inquiry form, you can set up Web-to-Lead to generate Leads based on the data they provide in that form. You could even set up automation using Flow and Apex to automatically convert these Leads to Contacts. Work with the person in your institution who owns the form to update it with the necessary Salesforce code. For detailed information about Web-to-Lead, see Generate Leads from Your Website in Salesforce Help.

Make sure your import process or automation takes into consideration how you'll populate the required Company field on Lead records, and how that works with the EDA Settings that determine how Accounts are named when Leads are converted.

Create a Lead Manually

1. Click the Leads tab and click **New**. If you don't see the tab, find it from the App Launcher.
2. Enter relevant details, paying attention to these fields.

   Last Name
   This field is required.

   Company
   This field is required.

   If you've configured Automatically Rename Lead-Converted Accounts in EDA Settings, what you enter for Company isn't used to name the Account when the Lead is converted.

   If you haven't configured Automatically Rename Lead-Converted Accounts in EDA Settings, enter a name that matches the naming conventions of the account model you're using in EDA. For example, if you're using an Administrative Account model, enter `Lombard Administrative Account` for a suspect named Louis Lombard.

   Lead Status
   This field is required. Choose Open - Not Contacted, Working - Contacted, or other values that your institution has defined.

3. Save your changes.

Convert Lead Records to Contact Records

When you convert a Lead is up to your institution, but we recommend doing so when a suspect signals interest, thus becoming a prospect. When converting a Lead, the fields on the record create three records: Contact, Account, and optionally Opportunity.

1. Open the Lead record and click **Convert**.
2. Enter the relevant details for the new records, paying attention to these Account fields.

   Account Name

   If you've configured Automatically Rename Lead-Converted Accounts in EDA Settings, what you enter for Company doesn't matter. You can leave the value that was inherited from the Lead record.

   Record Type

   Select a record type. Typically, this is Administrative or Household.

   If you've configured Automatically Rename Lead-Converted Accounts in EDA Settings, select one of the record types you've specified for the setting to ensure that you name the Account appropriately.

3. If using Opportunities, specify a name for the Opportunity that makes sense for your institution. By default, the value is the Company name followed by a hyphen.
4. Click **Convert**.

After a Lead is converted, we recommend creating an Affiliation record connecting the Contact record to an Account record, like the academic program the person is interested in. Then use the Role field on the Affiliation record to identify the Contact record as a prospect.

For steps on how to convert a Lead, see Convert Qualified Leads in Salesforce Help. For full mapping details, see Lead Conversion Field Mapping.

Things to Know About Maintaining Lead Data

Check new Account records periodically to ensure their Account Names follow your naming convention.

If you find any that don't align, you can update them from EDA Settings by selecting Update All Administrative Account or Household Account Names.

If you frequently import large lists of suspects, managing Leads can be an overwhelming task. Create a dashboard to help you monitor suspects through the different stages. Then create a strategy for maintaining Leads, as some leads tend to persist over time, while others require periodic purging to maintain data integrity.

Consider how to handle duplicate Leads. For example, if a suspect is included in a list from a testing service, and then again in a list for a recruiting event, two Lead records can result for the same suspect. Include duplicate cleanup in your maintenance strategy. Also review Merge Duplicate Leads in Salesforce Help.

If your recruitment process requires updating Lead records after they've been converted, assign your staff the View and Edit Converted Leads permission. For more information, see Let Users View and Edit Converted Leads in Salesforce Help.

Lastly, review additional Things to Know About Leads in Salesforce Help.

Opportunity

An Opportunity represents an official chance for a prospect to enrol at your institution.

Sample Uses for Opportunity

When a potential student signals interest in your institution, recruiting and admissions teams have a window of chance to engage with that person and get them to enrol. The Opportunity object tracks data related to that official chance, such as the prospect's desired start term, campus, degree level, the probability of the opportunity itself, and any other details that you want to include.

Opportunity Record Types

EDA doesn't provide any record types for Opportunities. Create them for your institution if required.

Configure Opportunity

Set up Opportunity data for your educational institution and learn about the steps required to maintain the data.

Initial Configuration for Opportunity

EDA doesn't provide any settings specific for Opportunities.

Keep in mind that Opportunity is a sales-focused standard object, which means that your institution is unlikely to use all of the available fields. To help make the object more relevant to educational institutions, EDA includes a few custom fields on the object and a page layout. Make sure to assign this page layout to people that you want to work with Opportunity records.

The Stage field can help you track how close the prospect is to enrolling at your institution. Consider updating the default picklist values for this field as they're very sales-focused. For example, you can add custom Stage values that represent your recruiting cycle: Application Started, Application Submitted, Admitted, Rejected, Enrolled. Remember to map each value to an open or closed Status. Next, you can create a Sales Process, which contains the Stages of an Opportunity, and then update the Opportunity path. For more information, see Add or Edit Picklist Values, Create Multiple Business Processes, and Create a Path in Salesforce Help.

Your institution can also use Opportunity Contact Roles to identify other people related to the Opportunity. For example, you can track a parent or guardian's contact information in addition to the applicant. For more information, see Opportunity Contact Roles in the Salesforce Help.

To learn about the standard Opportunity settings that Salesforce provides and how to customise them for your institution, read Set Up Opportunities and Opportunity Products and Administer Opportunity Teams in Salesforce Help.

Keep Up with Opportunity Updates

As with all objects, verify and customise the security settings, navigation, and layouts for Opportunity, as needed.

Follow the general instructions in Display a New Custom Object After a Product Release, keeping in mind that you're editing settings for a standard object rather than a custom object.

Create an Opportunity Record

Some institutions choose to have a single Opportunity record represent the chance to enrol a prospect, regardless of how many different terms and programs the prospect is interested in. Other institutions, especially those looking for more granular data, choose to create multiple Opportunities for a single prospect, such as one for Term and one for Academic Program.

Create an Opportunity with Automation

If your institution uses automation to create Opportunity records, make sure to link the Account Name field to the prospect’s Account record. Make sure to use a naming convention on the Opportunity Name field as EDA provides no automation to maintain this field. Also consider automating the Close Date and Stage fields as they’re required.

Create an Opportunity During Lead Conversion

When you convert a Lead to a Contact, the name that you specify for the Opportunity record becomes the Opportunity Name. By default, the Opportunity record uses the Lead's Company field followed by a hyphen. When converting Leads, specify a name for the Opportunity that makes sense for your institution.

For more information about converting a Lead, see Convert Lead Records to Contact Records.

Create an Opportunity Manually

Manually capture opportunities for prospects to enrol at your institution, such as to track information that’s not covered by automation or conversion.

1. Click the Opportunity tab and click **New**. If you don't see the tab, find it from the App Launcher.

2. Enter relevant details for these required fields.
   - **Opportunity Name**

     Enter a name that matches the naming conventions defined by your institution. For example, `Last_Name - Application_Type Term or Lombard - Undergrad Fall 22'` for a prospect named Louis Lombard.
   - **Close Date**

     Enter the date you plan to close the opportunity. Sometimes this date is the start of a Term.
   - **Stage**

     Select the current stage the Opportunity is in, such as Prospecting or a custom value.
3. Specify EDA-specific details and other fields, such as Account Name, Desired Campus, Desired Start Term, Desired Degree Level and Completed FAFSA.
4. Save your changes.

Things to Know About Maintaining Opportunity Data

To help you monitor Opportunities through the different stages, consider creating a dashboard for you and your team.

For additional details about creating, cloning, and sharing your Opportunities, see Manage Your Opportunities in Salesforce Help.

Plan Requirement

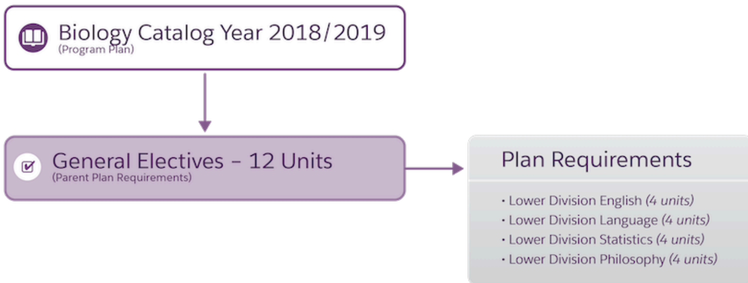
Plan Requirement represents a required item to fulfil the requirements of an Academic Programme, as specified in a Programme Plan.

Sample Uses for Plan Requirement

With the Plan Requirement object, you can detail the set of requirements for a Programme Plan, such as coursework, thesis, or internship. Students must fulfil the requirements to earn the degree or credential that's associated with the Programme Plan.

- University–Define the requirements for students declaring a major, pursuing a graduate degree, or pursuing a credential or certification.
- K-12–Define graduation requirements or requirements that satisfy a Programme Plan such as a College Prep Plan.

It's common to create a hierarchy of Plan Requirement records with child requirements nested under parent requirements. For example, an undergraduate degree in Biology requires 12 units of General Electives. The Programme Plan defines this requirement through a parent Plan Requirement and several child Plan Requirements.



Plan Requirement Record Types

Some institutions use record types to help distinguish between parent Plan Requirements and child Plan Requirements.

We don't provide preconfigured record types for Plan Requirements, but you can try this solution:

- To summarise the high level requirements, use a page layout for parent Plan Requirements (such as Biochemistry).
- Use a separate, more detailed page layout for the child Plan Requirements (such as Structural Biochemistry, Metabolic Biochemistry, and other options lower in the hierarchy).

Configure Plan Requirement

Set up Plan Requirement data for your educational institution and learn about the steps required to maintain it.

Initial Configuration for Plan Requirement

Before you begin creating Plan Requirement data, review some guidelines.

- You can relate a Plan Requirement to only one parent record. If the requirement is a parent Plan Requirement, the related parent record must be a Programme Plan. If the requirement is a child Plan Requirement, the related parent record must be a parent Plan Requirement.
- EDA includes validations to make sure that you relate the correct type of parent record and to maintain your hierarchical structures. The Plan Requirement Hierarchy setting, in EDA Settings, is enabled by default from Programme Plans under Courses and Enrolments.
- Various Table-Driven Trigger Management (TDTM) rules automates the creation, update, and deletion of Plan Requirement records and related records. Review the classes that affect the Plan Requirement object in Apex Class Descriptions for EDA.

Keep Up with Plan Requirement Updates

Depending on the version of EDA that you originally installed, consider these updates.

If Installed Before Version	Configuration Task
1.57	Plan Requirements are typically created as a hierarchical set of records with parent Plan Requirements related to a Programme Plan. Because of this relationship, it's best to create parent records from the Programme Plan record and child records from a parent Plan Requirement record. So, we recommend that you remove the New button from the Plan Requirements list view and prevent access to Plan Requirements form the App Launcher. To remove the New button from the Plan Requirements list view: 1. Click your profile image, and then click **Switch to Salesforce Classic**. 2. From Setup, in the Quick Find box, search for and select **Objects**. 3. Click **Plan Requirement**. 4. Under Search Layouts, next to Plan Requirements List View, click **Edit**. 5. Deselect **New**. 6. Save your changes. To prevent access to Plan Requirements from the App Launcher: 1. From Setup, in the Quick Find box, search for and select **Profiles**. 2. For the profile you want to change access, click **Edit**. 3. In the Custom Tab Settings section, for Plan Requirements, select **Tab Hidden**.

Create Plan Requirement Records

Review some considerations to efficiently set up Program Plan Requirements for your educational institution.

Design the Programme Plan's Requirements Hierarchy

You can control a lot about how Plan Requirements are configured. For example, make requirements required or optional. Create parent and child relationships. And relate requirements to a specific Course. When you use these strategies together, you create a hierarchical structure for a given Programme Plan. Let's consider some common ways you can set up Plan Requirements to create a hierarchy.

- A required Plan Requirement ***with*** a specific Course that students must complete to satisfy a Programme Plan.
- A required Plan Requirement ***without*** a specific Course that serves as a parent Plan Requirement with the number of credits that must be completed.

- Child Plan Requirements that are:
  - Required, ***with*** a specific Course that students must complete to satisfy a parent Plan Requirement.
  - Required, ***without*** a specific Course, but with specific criteria (such as `Any humanities course level 200 or above`) and a number of credits required.
  - Optional, with or without a specific Course. Students can select which optional requirements they complete to satisfy the total credits required by a parent Plan Requirement.

Prepare Your Programme Plan Hierarchy

Before creating Plan Requirement records, make sure to create the required records.

- An Academic Programme record to represent one of the offered programs. For example, B.S. Biology. For more information, see Account .
- A Programme Plan record for the current academic year, or perhaps for a previous or future academic year. For example, Biology Catalogue Year 2018/2019. For more information, see Program Plan .
- Course records to represent the Courses that can satisfy the Programme Plan's requirements. For more details, see Course .

Sample Programme Plan and Requirements

An Academic Program, B.S. Biology, has a Program Plan called Biology catalogue Year 2018/2019. Students pursuing this degree must satisfy 72 units of lower division requirements and 48 units of upper division requirements.

Biological Sciences Department

Biology (Bachelor's Degree)

LOWER DIVISION (72 units)	
Biology (16 units)	BIO 10, 20, 30, and 40
Chemistry (16 units)	CHEM 10, 20, 30, and 40
Organic Chemistry (8 units)	CHEM 50 and 51
Mathematics (12 units)	MATH 10A, 10B, and 11 or 20A, 20B, and 11
Physics (12 units)	PHYS 1A/1A Lab, 1B/1B Lab, and 1C/1C Lab
Electives (8 units)	Any

UPPER DIVISION (48 units)	
Intro Genetics (4 units)	GEN 100
Intro Molecular Biology (4 units)	BIOM 100
Intro Human Physiology (4 units)	BIOPHYS 100
Biochemistry (4 units)	Structural Biochemistry (BIOC 101) or Metabolic Biochemistry (BIOC 102)
Ecology, Behavior, Evolution (4 units)	Intro Ecology (ECOL 100), Intro Evolution (EVOL 100), or Intro Animal Behavior (BEHV 100)
Biology Labs (8 units)	BIOM 100 Lab, BIOC 101 Lab, or BIOC 102 Lab
Elective options (20 units)	Any

If we map the Programme Plan B.S. Biology's sample degree requirements to our Plan Requirements structure, we can apply these methods row by row, as summarised in this table.

General Category and Units Required	Courses to Satisfy	Plan Requirement Structure
Lower Division (72 units)		
Biology (16 units)	BIO 10, 20, 30, and 40	A required Plan Requirement with a specific Course.
Chemistry (16 units)	CHEM 10, 20, 30, and 40	A required Plan Requirement with a specific Course.
Organic Chemistry (8 units)	CHEM 50 and 51	A required parent Plan Requirement with required child Plan Requirements.
Mathematics (12 units)	MATH 10A, 10B, and 11 or 20A, 20B, and 11	A required parent Plan Requirement with optional child Plan Requirements.
Physics (12 units)	PHYS 1A/1A Lab, 1B/1B Lab, and 1C/1C Lab	A required parent Plan Requirement with required child Plan Requirements.
General Electives (8 units)	Any	A required Plan Requirement without a specific Course.
Upper Division (48 units)		
Genetics (4 units)	GEN 100	A required Plan Requirement with a specific Course.
Molecular Biology (4 units)	BIOM 100	A required Plan Requirement with a specific Course.
Human Physiology (4 units)	BIOPHYS 100	A required Plan Requirement with a specific Course.
Biochemistry (4 units)	Structural Biochem (BIOC 101) or Metabolic Biochem (BIOC 102)	A required parent Plan Requirement with optional child Plan Requirements.
Ecology, Behaviour, Evolution (4 units)	Intro Ecology (ECOL 100), Intro Evolution (EVOL 100), or Intro Animal Behaviour (BEHV 100)	A required parent Plan Requirement with optional child Plan Requirements.
Biology Labs (8 units)	BIOM 100 Lab, BIOC 101 Lab or BIOC 102 Lab	A required parent Plan Requirement with optional child Plan Requirements.
General Electives (20 units)	Any	A required Plan Requirement without a specific Course.

Create a Plan Requirement Record

Represent the required items of an Academic Program by creating Plan Requirement records.

1. From the **Programme Plans** tab, click the Programme Plan that you're creating a Plan Requirement for. If you don't see the tab, search for it from the App Launcher.
2. From the Plan Requirements related list, click **New**.
3. Enter the details, noting the following fields.

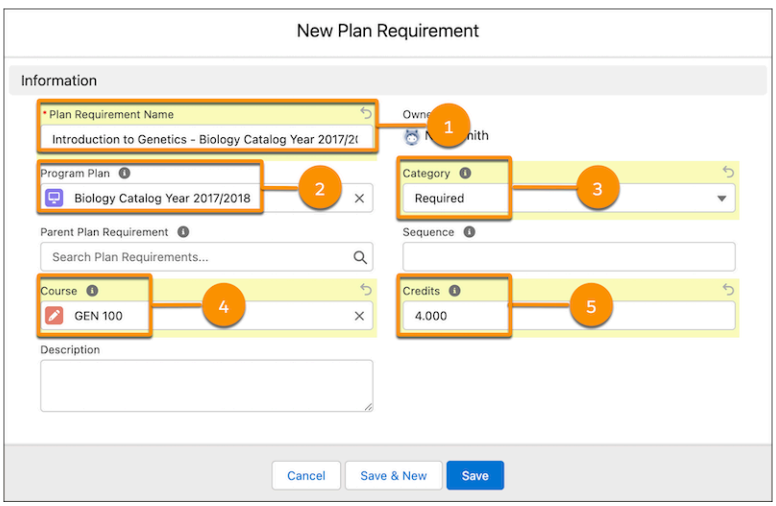
Field	Details
Plan Requirement Name	Because Programme Plans can change every year, it's helpful to reference the Programme Plan and academic year along with the name of the course. For example, `Organic Chemistry - Biology Catalogue Year 2018/2019`.
Programme Plan	Because you're starting from the Programme Plan record, the Programme Plan Name is filled in automatically. • If you're creating a parent Plan Requirement, leave the value filled in. • If you're creating a child Plan Requirement, clear this field. Child Plan Requirements look up to their parent Plan Requirement only—not to the Programme Plan.
Parent Plan Requirement	• If you're creating a parent Plan Requirement, leave this field blank. • If you're creating a child Plan Requirement, start entering the name of the parent Plan Requirement, and select it when you see it suggested.
Category	Your selection in the Category field depends on the type of Course. • If the Course is one of multiple ***required*** Courses under the parent Plan Requirement, select **Required**. • If the Course is one of multiple ***optional*** Courses, select **Optional**. We recommend that all the child requirements under a parent Plan Requirement share the same Category.
Sequence	Specify where this Plan Requirement falls in a progression through the Programme Plan. For example, enter 1 to indicate Semester 1 or 2 to indicate Semester 2.
Course	• If a single Course satisfies the Plan Requirement, enter the name of the Course, and select it when you see it suggested. • If the Plan Requirement doesn't require a specific course, leave this field blank. • If this requirement is a parent Plan Requirement that has Courses specified under child Plan Requirements, leave this field blank.

Field	Details
Credits	• Enter the credit units required. For example, a specific, single-Course Plan Requirement for a Course like CHEM 50 requires 4 credits. • Make sure this value matches the number of credit hours specified on the Course record. • A more general Plan Requirement like General Electives typically requires a total number of credits, such as 20 credits.
Description	• If you're creating a general Plan Requirement without specific Courses, use the Description field to spell out the criteria, such as Any upper division courses. • For other Plan Requirements, use the field to provide context for the requirement, such as 1 of 2 required Organic Chemistry Courses.

4. Save the information.

Plan Requirement for a Single Required Course

The following example shows a single-Course Plan Requirement for an introductory Genetics class.

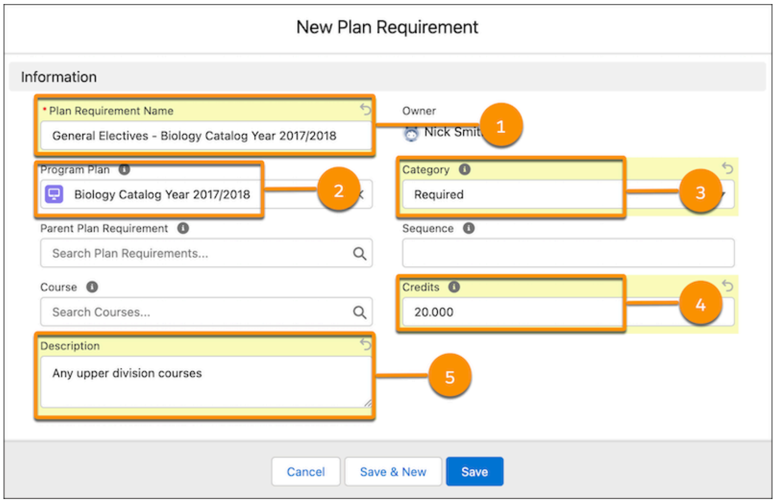


Be sure to complete the following fields.

- Plan Requirement Name (1)
- Programme Plan (2)
- Category (3)
- Course (4)
- Credits (5)

Plan Requirement Without Specific Courses

For a general Plan Requirement that students can satisfy by completing any Course, the record looks like this example of a General Electives requirement.

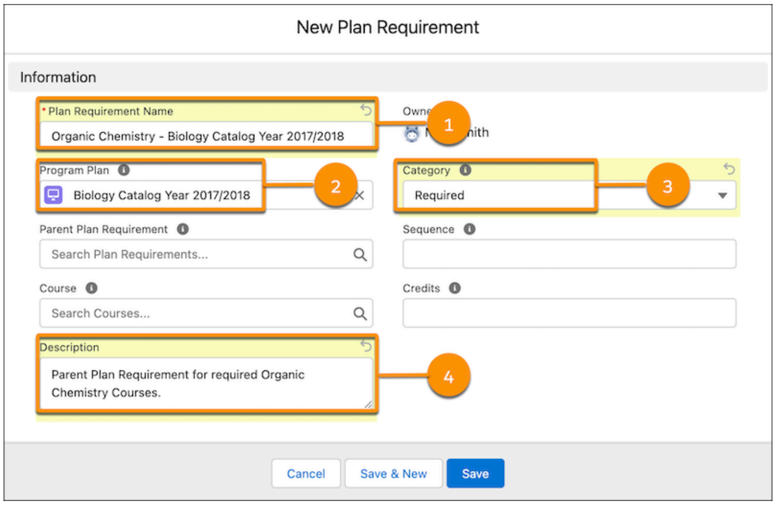


Be sure to complete the following fields.

- Plan Requirement Name (1)
- Programme Plan (2)
- Category (3)
- Credits (4)
- Description (5)

Parent Plan Requirement with Required Child Requirements

For a parent Plan Requirement that contains multiple required Courses, create the parent Plan Requirement record first, before the child Plan Requirement records. The record looks like this example of an Organic Chemistry requirement.

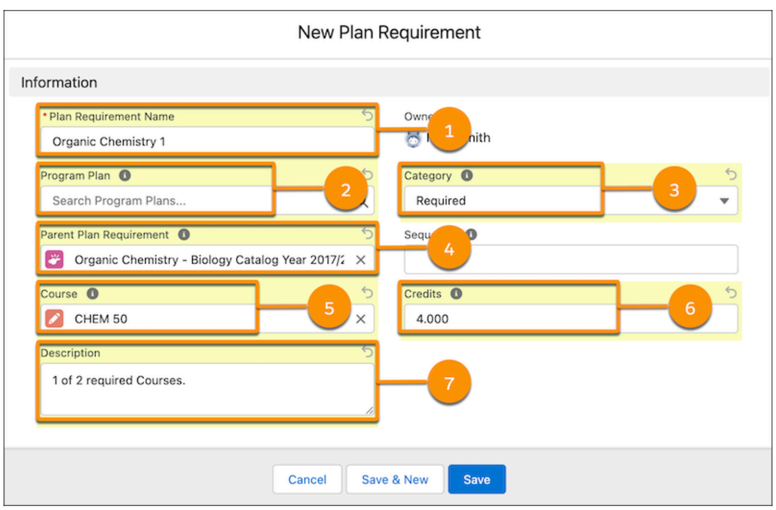


Be sure to complete the following fields.

- Plan Requirement Name (1)
- Programme Plan (2)
- Category (3)
- Description (4)

Child Plan Requirement

The record looks like this example of an Organic Chemistry I requirement.



Be sure to complete the following fields.

- Plan Requirement Name (1)
- Programme Plan (2)
- Category (3)
- Parent Plan Requirement (4)

- Course (5)
- Credits (6)
- Description (7)

Maintaining Plan Requirement Data

Review considerations for how to maintain Plan Requirement data for your educational institution.

- By default, Plan Requirement records are related to Academic Programme records, Programme Plan records, and Programme Enrolment records.
- Before deleting a Programme Plan record, delete any related Plan Requirement records, including Plan Requirements nested under parent Plan Requirements. EDA validates deletion of related records to prevent orphaned data.
- It's easiest to edit related records from the Programme Plan's Plan Requirements related list.

Programme Enrolment

Program Enrolment represents a student's (Contact's) enrolment in an Academic Program (Account).

Sample Uses for Programme Enrolment

Track students' past and present Programme Enrolments to see the arc of their educational journeys, as they explore courses of study and commit to majors, minors, or specialised programmes.

- University–Track enrolments in undergraduate, graduate, and continuing education programmes that grant degrees or credentials.
- K-12–Track enrolments in academic, support, and recreational programmes at a school or district level.

Configure Programme Enrolment

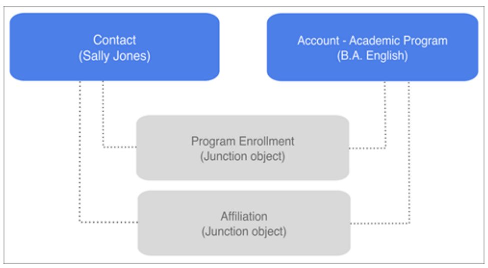
Set up Program Enrolment data for your educational institution and learn about the steps required to maintain it.

Initial Configuration for Programme Enrolment

While the Program Enrolment object comes preconfigured and doesn't require additional configuration beyond your own preferred customisations, it's essential to understand how to manage Program Enrolment data and configure related settings. Review these resources to make sure you have the full picture.

- EDA comes with default automation that keeps Program Enrolment records in sync with both Academic Program Account records and Affiliation records. For details, see Configure Affiliations Settings.
- Various Table-Driven Trigger Management (TDTM) rules control the creation, update, and deletion of Program Enrolment records and related records. Review the classes affecting the Program Enrolment object in Apex Class Descriptions for EDA.

Program Enrolment is a junction object that relates the Contact and Account objects–specifically, relating a student Contact with an Academic Program (Account record type). For example, let's say that an institution's undergraduate English major is represented by an Academic Program record called B.A. English. When a student declares her major as English and officially enrols in the major, a Program Enrolment record is created to relate her Contact record to the B.A. English Academic Program record.



Keep Up with Program Enrolment

Consider these updates, depending on which version of EDA you originally installed.

If Installed Before Version	Configuration Task
1.118	Add the Education History field to your page layouts, as needed. For more information, see Add Custom Fields and Picklist Values.

Create a Programme Enrolment Record

Creating a Program Enrolment record represents enrolling a Contact in an Academic Program. Typically, your institution has already created a series of Account records with the Academic Program record type to represent all of the programs on offer.

1. From the Contact record that you're adding enrolment information to, click **New** in the Programme Enrolments related list.

2. Enter relevant details, such as enrolment-related dates and standing in the Academic Programme.

   Note these fields in particular.

   - Programme–Start typing the name of the Academic Programme, and select it when you see it suggested.
   - Eligible to Enrolment–Select this field to indicate that this Contact can enrolment in Courses.

     > **Tip**
     > This field can be useful in a SIS (Student Information System) integration with EDA . Perhaps the SIS populates a student's registration information in the Program Enrolment record, and automatically selects Eligible to Enrol to indicate that the student is an active record, eligible to enrol.

   - Program Plan–If the field is visible, leave it blank. After you've saved this record, we automatically fill in the Program Plan that's designated as Primary for the Academic Program. If you don't see it filled in after saving, that either means that the Program hasn't designated a primary Program Plan or perhaps your institution has disabled this automatic feature.
   - Credits Attempted, Credits Earned, and GPA–Use these fields to store calculated, cumulative data. EDA doesn't provide rollup calculations out of the box because institutions vary a lot in how they prefer to calculate overall credits or GPA. We let you customise your own approach, such as using Flow or custom code to recalculate the values upon individual record updates for a Contact or in a batch process.
3. Click **Save**.

Things to Know About Maintaining Programme Enrolment Data

After a Contact's newly created Program Enrolment record is saved, an Affiliation record between the Contact and the Academic Program is created automatically (if one didn't already exist). These Program Enrolment and Affiliation records are automatically kept in sync thereafter. For example, if the student changes majors, departments, or even colleges, and Program Enrolment records are updated, deleted, or created anew, those changes can trigger automatic updates to Affiliation records, and vice versa.

For more information about Program Enrolments and Affiliations, see Program Enrolments In Parallel with Affiliations.

Programme Plan

Programme Plan represents the course of study required to fulfil the requirements of an Academic Programme (Account).

Sample Uses for Programme Plan

The Program Plan object represents a snapshot in time of the requirements for a specific student cohort enrolling in an Academic Program. The program itself tends to be a reliable offering year after year, while the requirements for completion tend to evolve over time. Use Program Plan along with the Academic Program (Account) record type and the Plan Requirement object to manage your requirements data.

- University–Represent the academic plan for a degree or credential offering. For example, a Biology Catalogue Year 2017/2018 Program Plan record represents a snapshot in time of the requirements for a specific student cohort enrolling in the BS Biology Academic Program.
- K-12–Represent the academic plans for a student's post-graduation path. For example, Program Plan records such as College Prep Plan, Vocational Plan, and Life Skills Plan can be created for students enrolling in a Graduation Academic Program.

Thanks to Adeline Moore, one of our community members, for the EDA idea that inspired several discussions (in the Hub and during the 2017 London Sprint) and led to the development of this feature.

Configure Programme Plan

Set up and maintain the Program Plan object in EDA.

Initial Configuration for Programme Plan

It's essential to understand how to manage Program Plan data and configure related settings.

Review these resources to make sure you have the full picture.

- Various Table-Driven Trigger Management (TDTM) rules control the creation, update, and deletion of Program Plan records and related records. Review the classes affecting the Program Plan object in Apex Class Descriptions for EDA.

Keep Up with Programme Plan Updates

Consider these updates, depending on which version of EDA you originally installed.

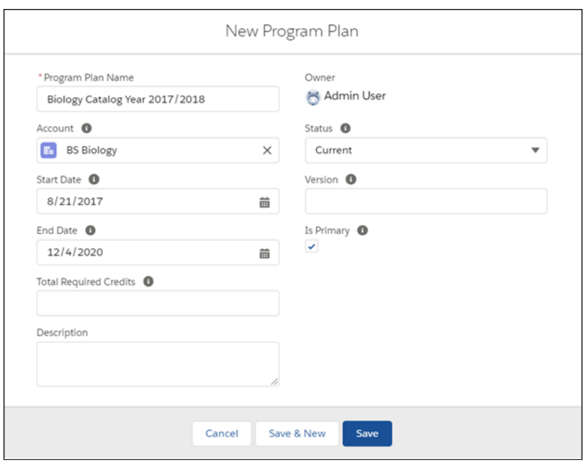
If Installed Before Version	Configuration Task

1.57	• Add the Program Plan field to the HEDA Program Enrolment Layout. We recommend adding it in the Information section, near the Program field that shows the Academic Program's Account. • For existing Contact page layouts, add the Programme Plan field to the Programme Enrolments related list. • If you're using a dedicated page layout for the Academic Program record type, consider adding the Program Plans related list to it. (Viewing related Program Plans from the Academic Program's Account record can be more convenient for some users, while others sometimes prefer to work from a list view of all Program Plans.)

Create a Programme Plan Record

Typically, your institution has already created Academic Program records to represent all of the programs on offer. Now, for a given Academic Program, create a Program Plan record for the current academic year, or perhaps for a previous or future academic year.

1. Go to the Program Plans tab and click **New**. If you don't see the tab, find it from the App Launcher.
2. Enter relevant details, noting these fields in particular.



- Program Plan Name–Enter a name representing a versioned set of degree requirements, such as `Biology Catalogue Year 2017/2018`. In this example, it represents the current academic year's plan and requirements for earning an undergraduate Biology degree. For the next year, create a separate Program Plan record, `Biology Catalogue Year 2018/2019`, to represent the latest plan and requirements.

- Account–Start typing the name of the Academic Program, and select it when you see it suggested. For example, `BS Biology`.
- Start Date and End Date–Specify the plan's effective dates, which are typically bookended by the first date when students can enrolment in the Academic Programme, and the last possible date of enrolment eligibility.
- Status–If the plan still applies to some enrollees, select **Current**. Otherwise, select **Archive**.
- Version–Enter additional version information that's not reflected in the Programme Plan Name.
- Is Primary–If this Program Plan is in effect for current enrollees, select **Is Primary**. Doing so automatically deselects the Is Primary field on a previous year's Program Plan and relates this Program Plan record to students' Program Enrolment records, so that new enrollees are always assigned the most current catalogue of degree requirements.

> **Note**
> After a Program Plan is assigned to a student, it remains in effect for the duration of the student's enrolment in the program–even if subsequently a new plan is marked Primary and new enrollees are assigned the new plan. In other words, changing the Primary setting for a Program Plan doesn't affect previously assigned enrollees.

3. Click **Save**.

Things to Know About Maintaining Programme Plan Data

By default, Program Plan records are related to Academic Program records, Plan Requirement records, and Program Enrolment records.

EDA validates deletion of related records to prevent orphaned data.

- Before deleting an Academic Programme record or a Programme Enrolment record, you must first delete any related Programme Plans.

> **Tip**
> It's easiest to edit these related records from the Programme Plans related list.

- Before deleting a Programme Plan record, you must first delete any related Plan Requirement records (including Plan Requirements nested under parent Plan Requirements).

> **Tip**
> It's easiest to edit these related records from the Plan Requirements related list.

Relationship

Relationship represents a connection between two Contacts.

Sample Uses for Relationship

The Relationship object represents Contact-to-Contact relationships. Relationship records are essential for keeping track of who's who, on or off campus, both in the present and in the past.

- Any educational institution–Track students' immediate and extended family relationships, emergency contacts, friendships, and others within their personal networks. Track their school-based relationships, such as those with advisors or counsellors, tutors, and coaches. Track instructors' relationships with other instructors, staff members, administrators, community members, and so on.
- K-12–Track whether a Contact is allowed to receive information protected by HIPAA, FERPA, or other privacy laws, regulations, and policies.

Configure Relationship

Set up initial Relationship data for your educational institution and learn about the required steps with each Salesforce update.

Initial Configuration for Relationship

Enabling the use of Relationships requires setting up Reciprocal Relationships to manage the two-sided nature of data about Contacts' relationships with each other. The Reciprocal Relationships feature comes preconfigured with default settings, but it's common for institutions to customise them to track different Contacts' roles in Relationships, or to use a different reciprocal method.

It's essential to understand how to manage Relationship data and configure related settings. Review these resources to make sure you have the full picture.

- Configure Relationships Settings
- Various Table-Driven Trigger Management (TDTM) rules control the creation, update, and deletion of Relationship records and related records. Review the classes affecting the Relationship object in Apex Class Descriptions for EDA.

Keep Up with Relationship Updates

Consider these updates, depending on which version of EDA you originally installed.

<table>
<tr><th>If Installed Before Version</th><th>Configuration Task</th></tr>
<tr><td>1.111</td><td>In the existing Husband and Wife reciprocal settings, change <code>Spouse</code> to <code>Partner</code>.
• Create a Partner reciprocal setting. Specify these values.
– Name–<code>Partner</code>
– Female–<code>Wife</code>
– Male–<code>Husband</code>
– Neutral–<code>Partner</code>
– Active–Selected
Note
These updates are required to avoid Settings Health Check reporting errors for a missing Partner value. For details about editing reciprocal settings, see Configure Relationship Settings.</td></tr>
<tr><td>1.104</td><td>Add these picklist values to the Type field, as needed: Guardian, Dependent, Stepfather, Stepmother, Stepparent, Stepdaughter, Stepson, Stepchild, Foster Parent, Foster Daughter, Foster Son, Foster Child.</td></tr>
<tr><td>1.109</td><td>Add these picklist values to the Type field, as needed: Parent's Sibling; Niece; Nephew; Sibling's Child.
Note
This update is required to avoid Settings Health Check reporting errors for not finding these values.</td></tr>
</table>

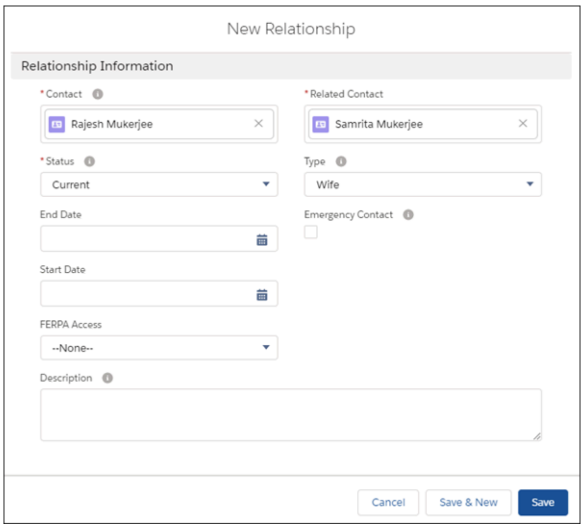
Create a Relationship Record

Capture connections between Contacts by creating Relationship records.

1. From the Contact record that you're creating the Relationship from, click **New** in the Relationships related list.

2. Enter relevant details, noting these fields in particular.

   - Contact—Filled in automatically with the name of the Contact whose record you started from.
   - Related Contact—Start typing the name of the person who has a relationship to the Contact, and select it if you see it suggested. If the Contact doesn't exist yet, click **New Contact** to create their record now.
   - Type—The kind of relationship, as described from the Related Contact's point of view. It can help to think of completing the sentence, <Related Contact> is the <Type> of <Contact>. In this example, Samrita Mukerjee is Rajesh Mukerjee's wife.

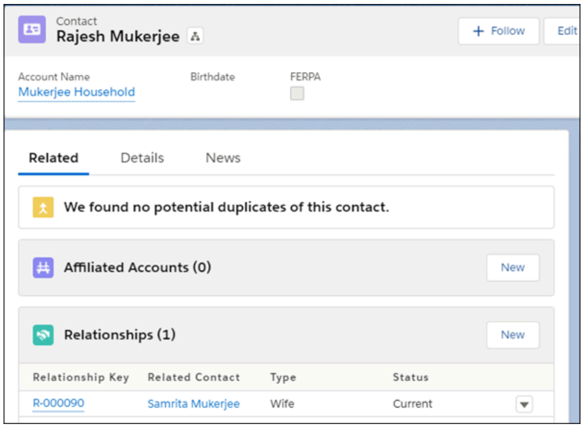
   

   - Status—Current or Former.

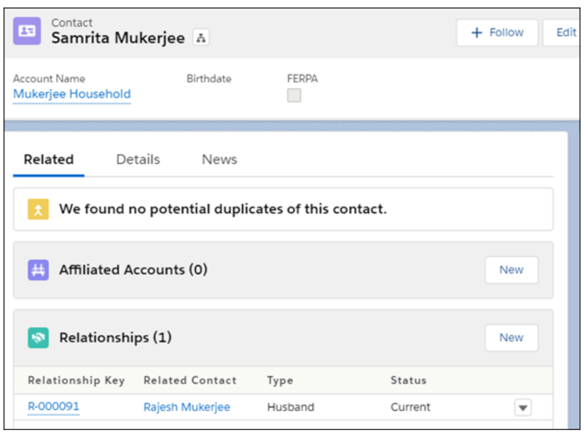
3. Click **Save**.

View Contacts' Relationship Records

After a Contact's newly created Relationship record is saved, we can view the Contact's record to see the Related Contact in the Relationships related list. In this example, we see on Rajesh Mukerjee's Contact record his relationship with his wife, identified by Relationship record R-000090.



The Reciprocal Relationship is created automatically when the Relationship record is saved. We can view the Contact record of the Related Contact to see the Relationship represented in the other direction. In this example, we see on Samrita's Contact record, in the Relationships related list, that Rajesh is her husband, identified by a different Relationship record R-000091.



Note

EDA doesn't come with a visualisation tool for viewing Relationships (such as the Relationships Viewer in our sister product, Nonprofit Success Pack).

Term

Term represents an academic period when your institution is in session.

Sample Uses for Term

The Term object defines not only the dates when a Course is offered, but also the Term Type, Grading Period Sequence, Instructional Days, and a Parent Term (if it's part of a period defined by a larger Term).

- University–Set up one set of Terms for the Business School and a different set for the Law School.
- Any educational institution–Specify a hierarchy of Terms, such as a 2018-2019 School Year parent Term with nested child Terms, 2018-2019 School Year Fall Semester and 2018-2019 School Year Spring Semester.

Configure Term

Consider these updates, depending on which version of EDA you originally installed.

Keep Up With Term Updates

If Installed Before Version	Configuration Task
1.67	• Add the Parent Term, Type, Instructional Days, and Grading Period Sequence fields to the Term page layout. • Add the Terms related list to the appropriate Account page layout (for example, the Organisation Layout). Learn about updating page layouts in Display a New Custom Object After a Product Release.

Create Term Records

Create Term records for specific periods of time you want to track at your school. Typically, you create multiple records when you first start implementing Term data.

Before you create a Term, you must have an Account set up to relate to it (for example, an Account that represents the entire school, or a school within a school).

Tip

When creating Term records, consider:

- Specifying "Part of Term" for the Type option if you offer six-week mini-terms or you segment your summer session into periods A through D.
- Providing details about a Term’s relationship to other Terms. For example, enter the Parent Term that a Term is nested under, or enter a Grading Period Sequence that this Term represents ("1" for the first quarter, “2” for the second quarter, and so on).

  With Terms, you can define as many levels of detail as needed for your institution’s model. For example, some schools define an Academic Year with a Summer Term that then has Summer 1 (8 weeks) and Summer 2 (8 weeks) nested under it.

1. From an Account record, like a Department, click **New** in the Terms related list.
2. Enter start and end dates for the Term. Don't change the Account name.
3. Fill in optional fields as needed. Click **Save & New**, and continue creating additional Term records as needed.

Term Grade

Term Grade stores student grades for a specific grading period.

Sample Uses for Term Grade

Term Grades are intended for tracking student grades. You can use them to mark grade milestones for a single Course Connection that spans multiple Terms, or multiple grade milestones for a single Term.

You can track Term Grades using numerical, percentage, or letter values. Let's look at some possible uses for the Term Grade object.

- University–Specify the grade that a student receives for a Course they're taking for a specific period of time. For example, create a Term Grade record for a midterm grade, another for a final grade, and, if needed, one for a corrected grade.
- K-12–Specify grades for a full-year Course. For example, if a student is enrolled in a Course that spans a full year, create one Term Grade record for Semester 1 grading period, and another for Semester 2 grading period. And create a Term Grade record for the final grade for the Course itself.
- Online institution–Track self-paced online courses with a series of eight-week Terms that have a Term Grade record associated with each.

> **Tip**
> When considering using Term Grade:
>
> - Don't use Term Grades as a general gradebook for assignments, quizzes, and the like. Instead, use Term Grade records to track key grades for a given Term, like mid-term exams or final grades.
> - Create your own Type of Term Grade for any specific grading period within a Term.

- Track the final grade a student receives for a specific Course Connection with the Grade field on a Course Connection instead of Term Grade.

Prerequisites

Because Term Grades are used to capture a grade a student receives for a specific Course or Term, it's a good idea to have a Course Connection and Term already defined so you can associate the Term Grade with them. The fields aren't required to create a Term Grade, but having them in place is a good practice.

Configure Term Grade

Learn about the steps required to maintain the data.

Keep Up with Term Grade Updates

Consider these updates, depending on which version of EDA you originally installed:

If Installed Before Version	Configuration Task
1.74	• Add the Term Grades related list to the HEDA Course Enrolment Layout. • Customise the HEDA Term Grade Layout to best support your use case. We recommend requiring important fields like Term, Term Grade, or Course Connection.
1.84	• Add the Term Grades related list to your Contact and Course Offering page layouts to best take advantage of these lookups. See Display a New Custom Object After a Product Release. • Add the Contact and Course Offering lookup fields to the Term Grade layout. See Add a Lookup Field to a Page Layout.

Create Term Grade Records

Create term grade records from contacts, course offerings, or course connections in EDA.

Before you create a Term Grade record, create the record from which you want to track Term Grades. This will typically be a Contact, Course Offering, or Course Connection.

1. Enter Term Grade details. Don’t change the Contact or Course Connection names.
2. Click **Save**.

Test

An instance of a student taking a test.

Sample Uses for Test

Let's look at some possible uses for the Test object.

- University–Relate a Test with an Application to track a prospective student's completion of required tests (for example, the GMAT for a graduate Business program).
- K-12–Identify any AP tests or standardised tests (for example, PSAT, SAT, or ACT) a student has completed.

Configure Test

Set up the test object to use in EDA.

Initial Configuration Tasks

Depending on your requirements, consider adding the Tests related list to the Contact page layout. If your institution tracks different types of tests than the ones provided by default, you can also update the picklist values for the Test Type field.

Learn about updating page layouts in Display a New Custom Object After a Product Release and picklist values in Add Custom Fields and Picklist Values.

Add Test Definition Custom Metadata Type to Test Records

With Custom Metadata Types, you can create your own setup objects whose records are metadata rather than data. You can add a definition of a test that includes general information including the name, type, and description of the test. You can also indicate the unique credentialling identifiers for the test and the organisation that issues the test.

1. Click , then click **Setup**.
2. In the Quick Find box, search for and select **Custom Metadata Types**.
3. Next to Test Definition, click **Manage Records**.
4. Enter the relevant information and click **Save**. Or click **Save & New** to create another Test Definition.

Keep Up with Test Updates

Consider these updates, depending on which version of EDA you originally installed:

If Installed Before Version	Configuration Task
1.118	• Add the following fields to your page layouts, as needed. – Credentialling Identifier – Credits Earned – Verification Status – Verification Status Date For more information, see Add Custom Fields and Picklist Values.

Create a Test Record

Create test records from a contact record or from the Tests object in EDA.

1. If the Contact record has a Tests related list, click **New** in the related list. If not, from the App Launcher, find and select **Tests**, and click **New**.
2. Enter relevant details about this Test.
3. Click **Save**. Or, if you're creating multiple Test records, click **Save & New**.

> **Tip**
> As a next step, create Test Score records to track the results of these tests. See Test Score.

Test Score

The score on a section of a specific test or a composite score.

Sample Uses for Test Score

Relate a Test Score with a Test to track a prospective student's composite (overall) scores on tests like the SAT or GRE. Alternatively, track section-specific scores to assess student readiness for a post-high school education.

For example, consider individually tracking the maths, evidence-based reading, and writing scores of the SAT to determine which subjects students need more help preparing for.

Configure Test Score

Keep the Test Score object up to date and add custom metadata.

Keep Up with Test Score Updates

Consider these updates, depending on which version of EDA you originally installed:

If Installed Before Version	Configuration Task
1.118	• Add the following fields to your page layouts, as needed. – Credentialling Identifier – Letter Score – Status For more information, see Add Custom Fields and Picklist Values.

Add Custom Metadata to Test Score Records

With Custom Metadata Types, you can create your own setup objects whose records are metadata rather than data. You can add a definition of a test score that includes how the test is graded, the scoring range, and the passing value.

1. Click , then click **Setup**.
2. In the Quick Find box, search for and select **Custom Metadata Types**.
3. Next to Test Score Definition, click **Manage Records**.
4. Enter the relevant information and click **Save**. Or click **Save & New** to create another Test Score Definition.

Create a Test Score Record

Use these steps to create a test score record in EDA.

1. From the Test record related to this score, click **New** on the Test Scores related list.
2. Enter relevant details about this Test Score.
3. Click **Save**. Or, if you're creating multiple Test Score records, click **Save & New**.

Time Block

Time Block represents a specific period of time, often as it relates to Course Offerings.

Sample Uses for Time Block

Let's look at some possible uses for the Time Block object.

- University–Define the hours when specific courses are offered.
- K-12–Define the hours when class periods are held.
- Any educational institution–Specify hours when certain facilities are available for use.

Note

When deciding how to use Time Block, it's important to consider its relationship with Course Offering and Course Offering Schedule. See Create Time Block Records for more information.

Prerequisites for Time Block

Before you create a Time Block, it's a good idea to have an Account set up to relate it to (for example, an Account that represents the entire school, or a school within a school).

Configure Time Block

Consider these updates, depending on which version of EDA you originally installed.

Keep Up with Time Block Updates

If Installed Before Version	Configuration Task
1.74	Add the Time Blocks related list to the appropriate Account page layouts. Learn about updating page layouts in Display a New Custom Object After a Product Release.

Create Time Block Records

Create Time Block records for specific blocks of time you want to track at your school. Typically, you create multiple records when you first start implementing Time Block data.

Tip

When creating Time Block records:

- Use Time Block on a Course Offering only if you don’t expect to use the Course Offering Schedule object, which tracks the same kind of data.
- If you do use Time Block on a Course Offering and you create a Course Offering Schedule, the Time Block's Start Time and End Time on the Course Offering is *not* copied to the Start Time and End Time on the Course Offering Schedule records.
- If you choose to use the Time Block on the Course Offering Schedule, the Start Time and End Time on the Course Offering Schedule automatically populates from the Time Block record. We recommend that you not manually update Course Offering Schedule values if you are using Time Blocks. Manual updates prompt an error asking you to adjust the start and end times to match the Time Block upon saving.

1. From an Account record, like an Educational Institution, click **New** in the Time Blocks related list.
2. Enter a name for the Time Block and start and end times. Don't change the Account name.
3. Fill in optional fields as needed. Click **Save & New**, and continue creating additional Time Block records as needed.

Reporting and Analytics in EDA

See how Education Data Architecture provides insight and analysis for every stage of the student life cycle.

Create a List of Prospective Students

In this common use case doc, we'll show you how to identify high school students who've expressed interest in academic programmes at your college or university.

Introduction

It's application season and high school students from all over the country will soon begin making decisions about which colleges and universities they'll apply to.

College admissions recruiters have one of the toughest jobs around—keeping track of the hundreds, and often thousands of students who've expressed interest in their Higher Ed institution.

In this article, we're going to let you step into the shoes of one of those admissions recruiters, and show you how Salesforce and the Education Data Architecture (EDA) turn this daunting job into something streamlined and efficient. Specifically, we'll walk you through one of the most common use cases for admissions recruiters: identifying students from a subset of high schools who've expressed interest in academic programs at your college or university.

But with Salesforce and EDA, it's all about data. So as a recruiter using Salesforce, you need to think about the situation in those terms. What you're after, in particular is:

- A list of current high school students
- From all the high schools in the geographic region that you cover
- Who've expressed interest in an academic programme at your school

That's three criteria you'll need to use to filter your data. But before you even think of doing that, you need to think about the data architecture itself, because with EDA, that's where it all begins.

> **Important**
> The explanations and data analyses we provide in this article assume that you're already familiar with the various components of EDA . If you haven't done so already, read through all of the EDA documentation related to building your architecture before you move on.

Prospective Students–Organising the Data

Whether you're tracking a small set of high school students, or a nationwide sampling of prospects, there are many ways you can organise your data in Salesforce.

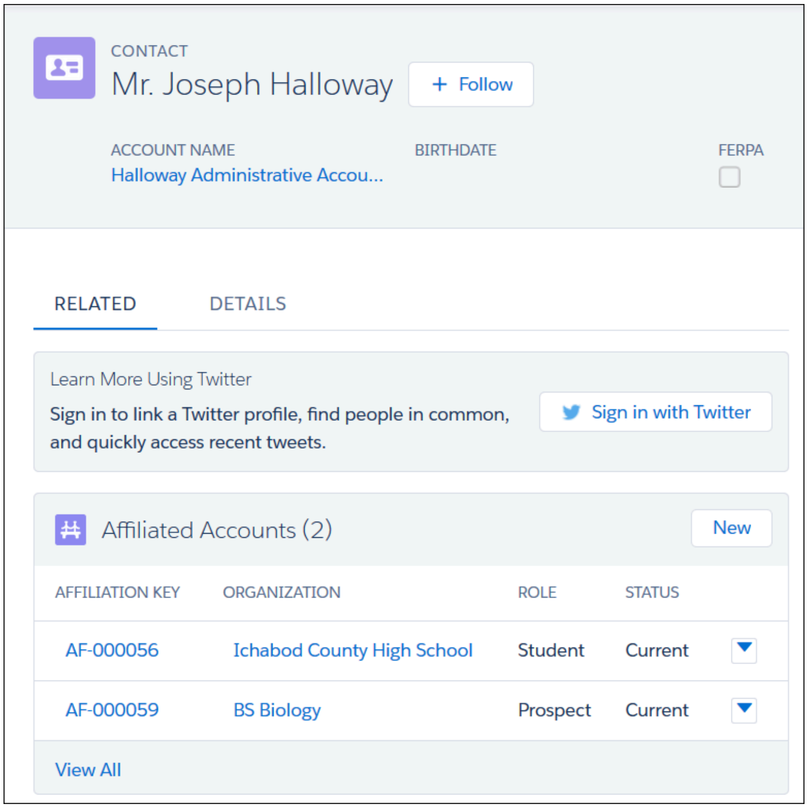
EDA provides an out-of-the-box organisational data structure you can use as a baseline, so that you don't have to plan so much on your own. In this section we'll provide some best practices advice on how to use EDA to build a totally streamlined system that gives you the results you need.

So, here you are, the admissions recruiter, forced to think about how you want to track prospective students. You know the three pieces of data you need, but let's look at them again. Specifically, you need to track:

- Current high school students
- From all the high schools in the geographic region that you cover
- Who've expressed interest in an academic programme at your school

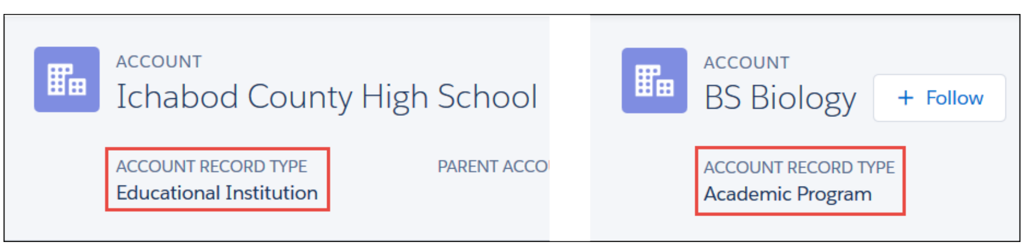
What's the best way to do that in EDA?

Conveniently, EDA comes with Salesforce fields and objects that let you easily set up this kind of data in an integrated way. The best way to tell you is to show you, so let's take a look at a sample record for one of the high school students you're tracking, Joseph Halloway:

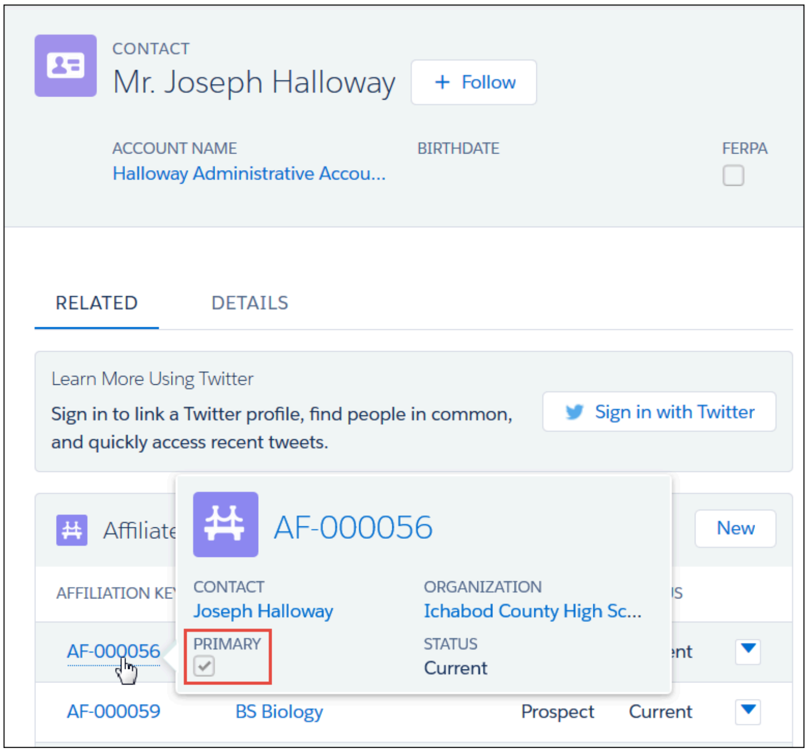


You can see from Joseph's Administrative Account record that we're using the EDA Affiliations object to track the main pieces of data we're interested in. The Affiliations object is a junction object that connects Joseph Halloway to the other two Accounts you see above —Ichabod County High School, one of the schools in the geographic region you cover, and BS Biology, one of the premier programs at your college. We've set a specific Role and Status for each of these Affiliations: Joseph is a current student at Ichabod County High School. He's also a prospect for the BS Biology degree. These values are important, and you'll see why a little later.

One level deeper, we see what those two Affiliated Accounts are. The Ichabod County High School record is an Account with a record type of Educational Institution. The BS Biology record is an Account with a record type of Academic Program.



That's really important too, because we need to understand those different Account types, and our ability to set them as Primary, if we want to get the reporting results we're after. That's the last piece of the architecture—setting each of these Account records as Primary on the Affiliations objects themselves. If we don't do that, the data will not be available to us through Joseph's Contact record, which is where we need to see it if we later want to include the information in our report.



So there you have it—a simple and elegant way to organise your data for prospective students in EDA, using Accounts, Account record types, Affiliations, and Primary Affiliations. Once your architecture is in place, and your data is in, you're ready to get some results.

In the next sections, we're going to walk you through the process of actually doing something with all the data we just talked about. However, we need to show you how to do that using some sample data, which already includes Accounts, Affiliations, and so on, in our Salesforce org. If you actually want to do these steps with us, you should first go ahead and create records for 12 different students, all affiliated with a particular high school. And for 8 of those students, you'll also want to create additional affiliations to various degree programs.

But you don't actually have to do all that now. You can just sit back, watch, and learn!

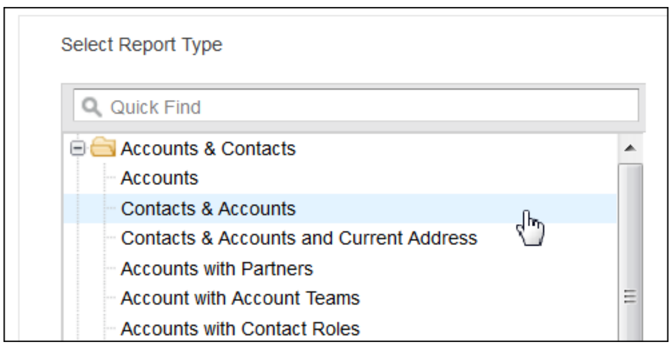
Create a Contact & Accounts Report

So how do we get the data we're after?

We're going to use EDA in conjunction with one of Salesforce's most powerful features: Reports.

Note
The procedures in this document are written for the Salesforce Lightning Experience user interface. If you're using the older Salesforce Classic interface, what you see on screen may differ slightly.

1. Click the Reports tab. (If you don't see the Reports tab, from the App Launcher, find and select **Reports**.)
2. Click **New Report**.
3. Expand the Accounts & Contacts folder and select the Contacts & Accounts report type.



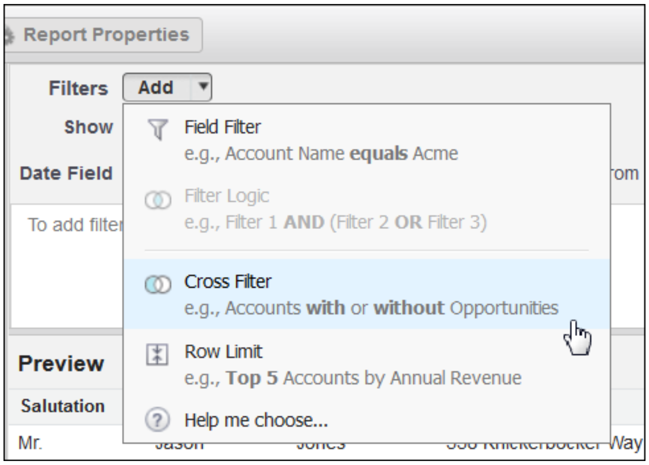
4. Lastly, click **Create**.

We're using the Contacts & Accounts report in Salesforce because it's the one that will let us drill down into those all-important, EDA-specific Affiliations.

Create a Cross Filter for Current High School Students

Next, we'll need a Cross Filter, so that we can look at data across various, integrated objects.

1. In the new, unsaved report, click the Filters drop down menu, and add a new Cross Filter.



2. Set the new Cross Filter to Contacts with Affiliated Accounts.

3. Click Add Affiliated Accounts Filter, and add the following filters:

- Role equals `Student`
- Status equals `Current`
- Organisation contains `school` (We don't want to use “high school,” because not all of the schools you track have that in their name!)

That covers the first few bits of data we need, right? Current students at the high schools we're tracking. In this simple example, only relevant high schools for our geo are in our database, but if you needed to sort out by state or city or zip code, you could do that too.

Tip

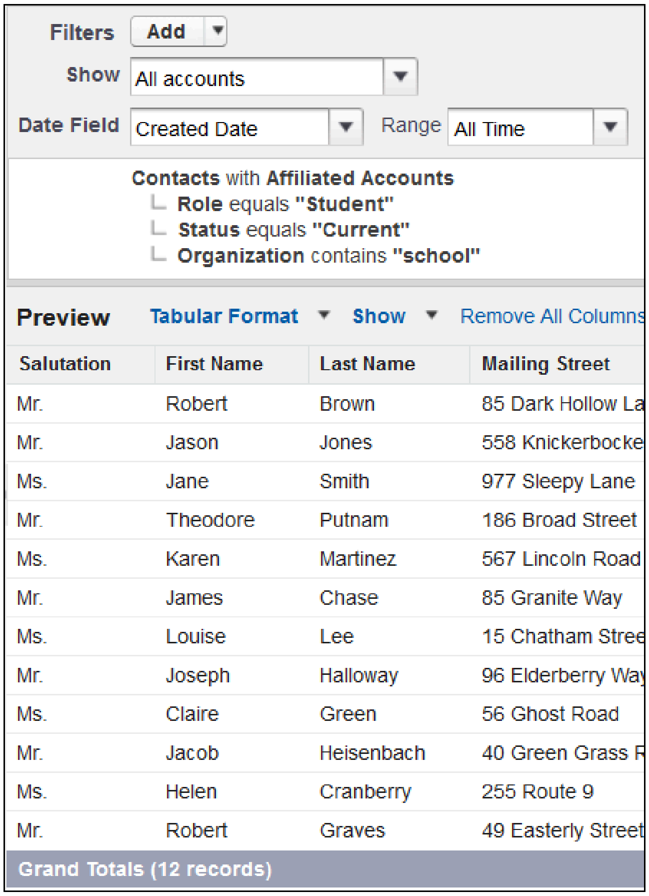
When lookups are available (in this example they're available for both Role and Status fields), you should use them to make selections in order to avoid typographical errors.

4. Make sure the other fields on the report are not restricting your data. For example, make sure that the Show menu is set to All Accounts, and the Date Range is set to All Time, so

that your report will include as many results as possible, regardless of who created the records, or when.

5. Click **OK** to run the report.

What you'll see is a list of all students you've been tracking from the four high schools in your geographic area. (In this example, there are twelve students.)



Salutation	First Name	Last Name	Mailing Street
Mr.	Robert	Brown	85 Dark Hollow La
Mr.	Jason	Jones	558 Knickerbocke
Ms.	Jane	Smith	977 Sleepy Lane
Mr.	Theodore	Putnam	186 Broad Street
Ms.	Karen	Martinez	567 Lincoln Road
Mr.	James	Chase	85 Granite Way
Ms.	Louise	Lee	15 Chatham Stree
Mr.	Joseph	Halloway	96 Elderberry Way
Ms.	Claire	Green	56 Ghost Road
Mr.	Jacob	Heisenbach	40 Green Grass R
Ms.	Helen	Cranberry	255 Route 9
Mr.	Robert	Graves	49 Easterly Street
Grand Totals (12 records)			

However, these are simply the students you've tracked over time, for one reason or another. Not all of these students have necessarily expressed interest in a particular program at your college.

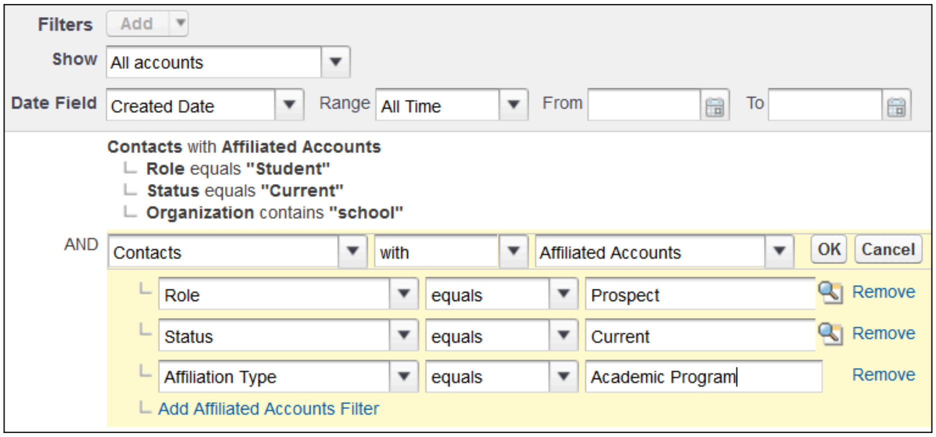
Create a Second Cross Filter for Prospective Students

Let's narrow the results by adding another Cross Filter to the report.

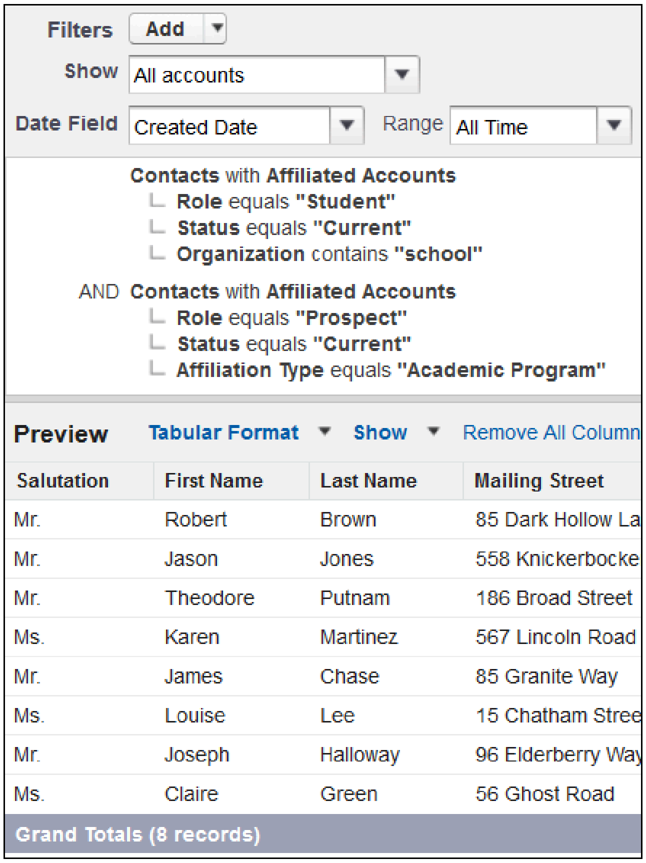
1. Click the Filters drop down menu again, and add another Cross Filter.
2. Set the new Cross Filter to Contacts with Affiliated Accounts, just as you did before.

3. Click Add Affiliated Accounts Filter, and add the following filters:

- Role equals `Prospect`
- Status equals `Current`
- Affiliation Type equals `Academic Programme`



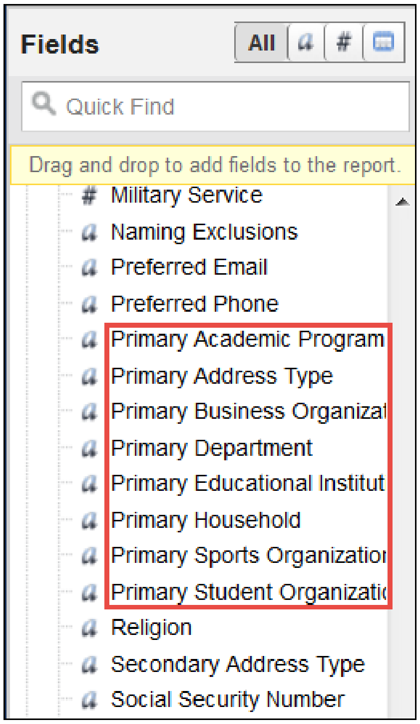
4. Click **OK** to run the report. The list of prospective students is refined to include only those students you've designated as “prospects”–that is, students who've expressed interest in a particular academic program. (In this example, there are eight.)



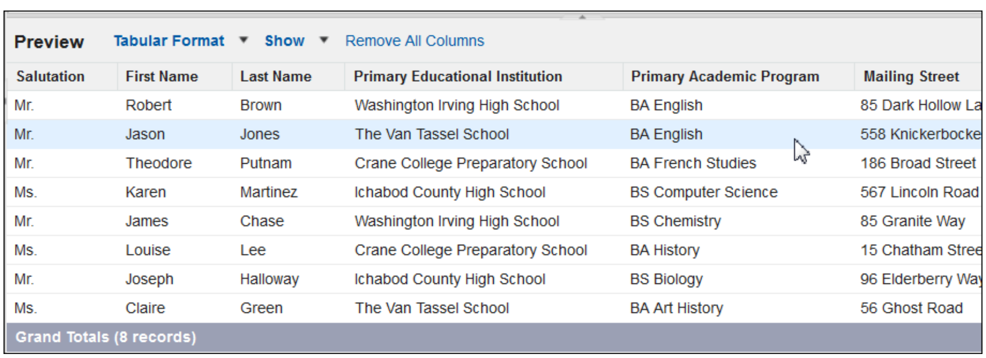
Salutation	First Name	Last Name	Mailing Street
Mr.	Robert	Brown	85 Dark Hollow La
Mr.	Jason	Jones	558 Knickerbocke
Mr.	Theodore	Putnam	186 Broad Street
Ms.	Karen	Martinez	567 Lincoln Road
Mr.	James	Chase	85 Granite Way
Ms.	Louise	Lee	15 Chatham Stree
Mr.	Joseph	Halloway	96 Elderberry Way
Ms.	Claire	Green	56 Ghost Road
Grand Totals (8 records)			

“But wait!” you say–that's not exactly good enough. You want to know the programs these students have expressed interest in, and it would be nice to see which high school each student is from too. EDA and Salesforce reporting functionality allows you to see that–as long as you've set those Primary Affiliations, which we talked about earlier.

5. Scroll down in the Fields column until you hit the Contact:Custom Info folder, and look for the cluster of Primary fields



6. Drag the **Primary Educational Institution** and the **Primary Academic Program** fields over to your report so that you can see the high schools and prospective programs of interest, as shown:



Preview Tabular Format ▼ Show ▼ Remove All Columns

Salutation	First Name	Last Name	Primary Educational Institution	Primary Academic Program	Mailing Street
Mr.	Robert	Brown	Washington Irving High School	BA English	85 Dark Hollow La
Mr.	Jason	Jones	The Van Tassel School	BA English	558 Knickerbocke
Mr.	Theodore	Putnam	Crane College Preparatory School	BA French Studies	186 Broad Street
Ms.	Karen	Martinez	Ichabod County High School	BS Computer Science	567 Lincoln Road
Mr.	James	Chase	Washington Irving High School	BS Chemistry	85 Granite Way
Ms.	Louise	Lee	Crane College Preparatory School	BA History	15 Chatham Stree
Mr.	Joseph	Halloway	Ichabod County High School	BS Biology	96 Elderberry Wa
Ms.	Claire	Green	The Van Tassel School	BA Art History	56 Ghost Road
Grand Totals (8 records)					

7. Save the report with a name like "Interested High School Students" and a description. You can return to this report over and over again, and it will update automatically with any data you add or edit.

Now you've got an amazingly useful report built with Salesforce and EDA. But remember, your results will only be as good as the data you provide, so be sure to follow best practices when architecting and entering data into Salesforce.

Create a List of Current Students

In this common use case doc, we'll show you how to create a list of the students at your college or university who meet certain criteria.

Introduction

In this article, we walk you through a simple use case that has lots of useful applications for faculty and staff.

We'll identify the students who've performed well in a foundational class for their major, based on their academic program and course enrolment information. Follow along as our recruiter for the School of Business uses Salesforce and the Education Data Architecture (EDA) to identify top candidates to invite to a B school information session.

What you're looking for:

- A list of current students
- Who are pursuing a degree in B.S. Economics
- Who've earned a B grade or better in Economics 101

To arrive at our list, we'll review the handful of data objects–such as Courses, Course Offerings, and Course Connections–that EDA uses to organise data. Then we'll set up a custom report type that links together data from these related objects into a single report. Lastly, we'll use your criteria to filter for the students we're interested in. First, though, let's talk in more detail about these objects and how they relate to each other in the data architecture.

> **Important**
> The explanations and data analyses we provide in this article assume that you're already familiar with the various components of EDA . If you haven't done so already, read through all of the EDA documentation related to building your architecture before you move on.

Student Enrolment Data: Course Objects and Relationships

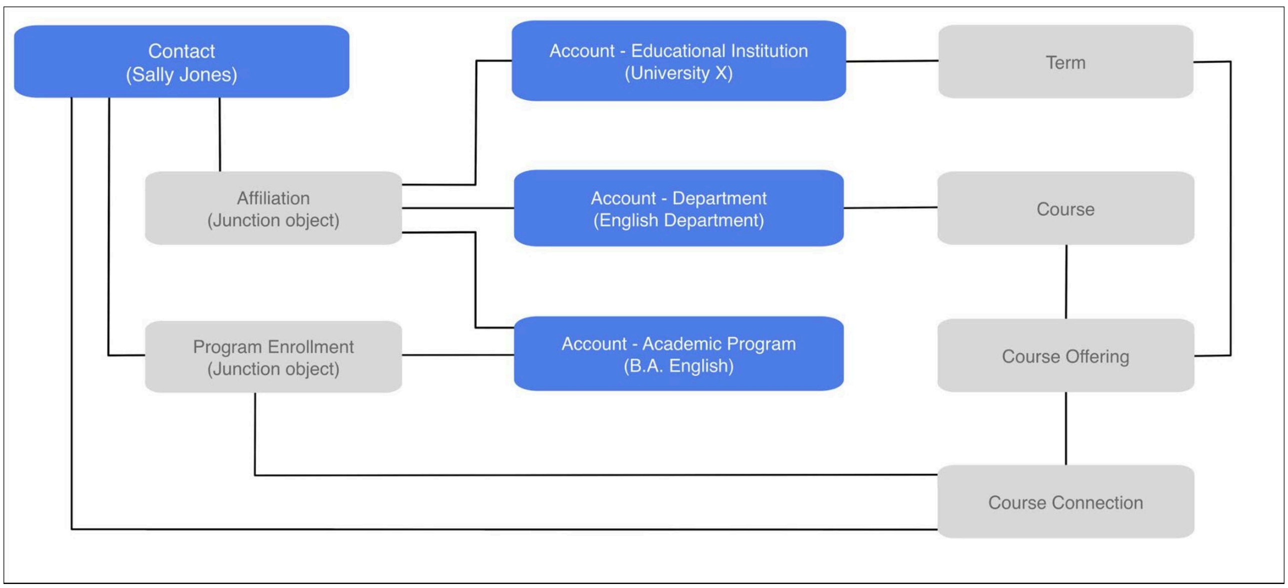
In this section we'll review how information about courses and enrolments is structured in EDA.

Chances are that you're working with students' enrolment data uploaded from your Student Information System. Once the data is in EDA, stored in Salesforce fields and objects, the bulk of the work is done. Those objects are automatically, easily accessible using Salesforce reports. Getting to the specific data set we want is simply a matter of understanding the hierarchical relationships between objects and drilling down into the data.

First, let's review the relevant objects and relationships in the data architecture.

- Course–A class that fulfils a certain number of credit hours, such as Economics 101.
- Course Offering–A unique instance, that is, a running of a course, that is associated with a specific term and faculty member, such as Economics 101 Fall 2017, Section A.
- Term–A school term or academic session that has a start and end date, such as Fall 2017.
- Course Connection–An object representing the relationship between a student and a course offering, capturing credit and grade information. It can also represent a faculty member's relationship to a course offering.

These objects track almost everything we need to know about a student's enrolment information in order to generate our list. This diagram summarises the object relationships.



The Program Enrolment object is also relevant. It's a junction object that connects a student with an academic program. For example, it tells us that a student has declared a B.S. in Business as their major. Notice that Program Enrolment is also a lookup field on the Course Connection object.

The hierarchy of relationships is important because it determines how we go about creating a report to tie these related objects together. For now, this quick review is enough to set the stage for diving into reports.

In the next sections, we'll show you how our B school recruiter uses Salesforce reports to create the invitee list for the information session. If you want to follow along, you'll need to first create sample data in your org for about a dozen students, their program enrolments, the ECON 101 course information, and the students' course connections to ECON 101. For maximum efficiency, we recommend creating records in this order.

1. Create Contact records for twelve different students.
2. Create an Account record to represent your school or university. Choose the **Educational Institution** record type.
3. Create Account records for a few different academic programs, one of which is B.S. Business. Choose the **Academic Program** record type for these accounts.
4. Create Account records for the departments that are associated with the academic programs that you created in the previous step. For example, create the "Economics Department" for B.S. Business. Choose the **University Department** record type for these accounts.
5. From each student's Contact record, on the Related tab, create a Program Enrolment record. Assign about half of your students to B.S. Business, and the rest to the other academic programs that you created in the previous step.
6. Create the ECON 101 course information.
    a. Create a Course record. Give it a name of "Intro to Economics," a Course ID of "ECON 101," and associate it with the Economics Department.
    b. Create a Term record, such as Fall 2016.
    c. Create a Course Offering record to represent a specific occurrence of the course that's associated with the Fall 2016 term. Give it a Course Offering ID of "ECON 101 Fall 2016."
7. Back on the Related tab of each student's contact record, click the Program Enrolment ID, such as PE-0010, to go to the student's Program Enrolment record. On the Related tab, create a Course Connections record. Associate every student with the Course Offering ID of "ECON 101 Fall 2016" and give every student a grade, but give them a range of grades, including some that are less than 80 (so that you can see filtering by grade later).

While setting up this sample data is a great way to continue getting familiar with EDA, it does involve some work. If these setup tasks are more than you want to do right now, you can skip them and just sit back and watch what our B school recruiter does with the data.

Create a Courses Custom Report Type

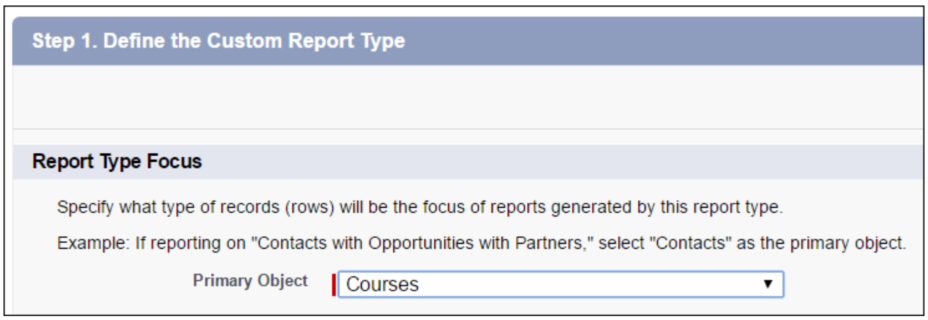
Out of-the-box, Salesforce with EDA gives you a number of standard reports, such as Course Connections with Contact's Academic Program, Course Connections with Course Offering ID, and so on.

In our case, we want a more complex report than what's available with the standard reports, so let's create our own by first creating a custom report type.

Note

The procedures in this document are written for the Salesforce Lightning Experience user interface. If you're using the Salesforce Classic interface, what you see on screen may differ slightly.

1. From Setup Home, enter "report" in the Quick Find box and click **Report Types**.
2. Review the introductory page about custom report types, and then click **Continue**.
3. Click **New Custom Report Type**.
4. For the Primary Object, select Courses.



By setting Courses as the parent object and focus of the report, we can drill down into its child objects, Course Offerings and Course Connections, and tie everything back to a student.

5. Enter a label such as Courses with Offerings with Connections.
6. Review the name that's automatically created from the label you entered and adjust it if needed.
7. Enter a description such as:

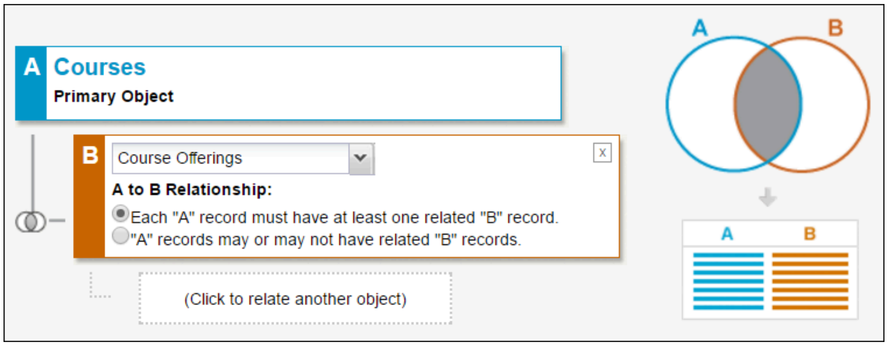
   Generate a list of current students

   Pursuing a B.S. Economics

   Who earned a B grade or better in Econ 101
8. For Store in Category select Other Reports.
9. Click **Next**.

10. With Courses already selected as the primary object, define its relationships to child objects in this precise order.

    a. Click **Click to relate another object** and select Course Offerings. Leave the A to B relationship requirement that each "A" record must have at least one related "B" record.



    b. Click **Click to relate another object** and select Course Connection. Again, leave the B to C relationship requirement that each "B" record must have at least one related "C" record.

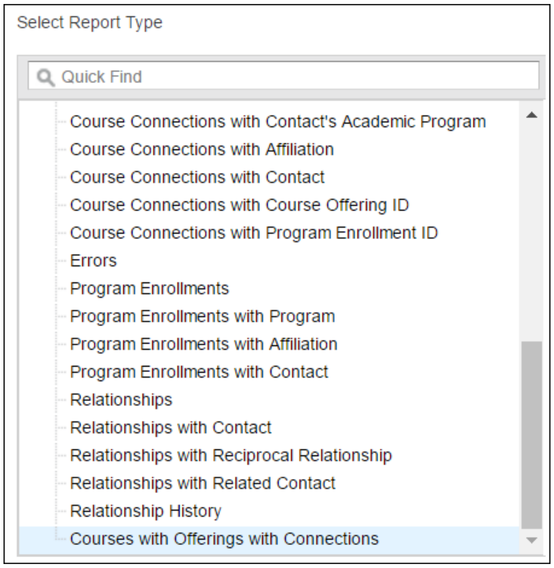
11. Click **Save**.

Customise Report Fields

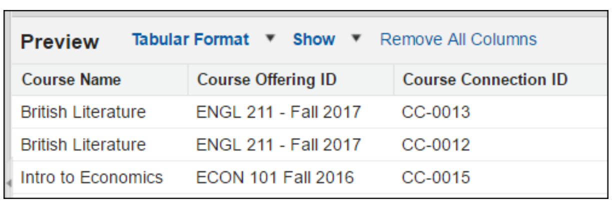
Now that we have a custom report type that pulls Course data from multiple related objects, let's create a report based on the report type.

1. Click the Reports tab. (If you don't see the Reports tab, from the App Launcher, find and select **Reports**.)
2. Click **New Report**.

3. Expand the Other Reports folder and select the Courses with Offerings with Connections report type. (If you don't see this report type, click **Show more ...** at the bottom of the list.)



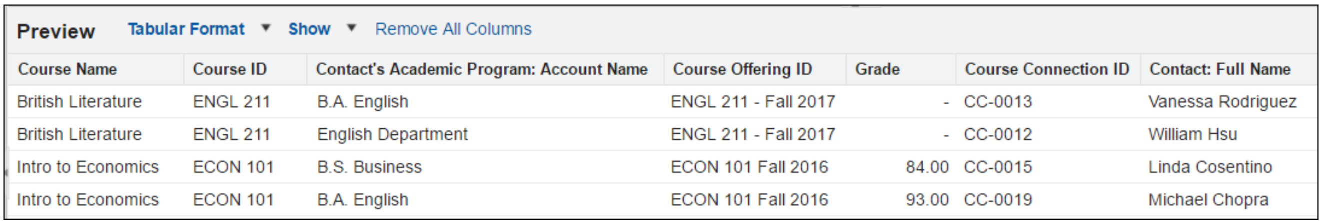
4. Click **Create**. The resulting report includes a few columns, for the fields that are included by default.



Course Name	Course Offering ID	Course Connection ID
British Literature	ENGL 211 - Fall 2017	CC-0013
British Literature	ENGL 211 - Fall 2017	CC-0012
Intro to Economics	ECON 101 Fall 2016	CC-0015

Adding a few more fields would be helpful, making it easier to confirm that we're including the correct students in the report.

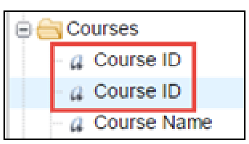
5. In the report builder, drag these fields from the Fields list into the Preview pane to add them to your report. The object that the field belongs to is shown in parentheses.
   - **Course ID** (Courses)
   - **Contact's Academic Program: Account Name** (Course Connection)
   - **Grade** (Course Connection)
   - **Contact: Full Name** (Course Connection)



Course Name	Course ID	Contact's Academic Program: Account Name	Course Offering ID	Grade	Course Connection ID	Contact: Full Name
British Literature	ENGL 211	B.A. English	ENGL 211 - Fall 2017	-	CC-0013	Vanessa Rodriguez
British Literature	ENGL 211	English Department	ENGL 211 - Fall 2017	-	CC-0012	William Hsu
Intro to Economics	ECON 101	B.S. Business	ECON 101 Fall 2016	84.00	CC-0015	Linda Cosentino
Intro to Economics	ECON 101	B.A. English	ECON 101 Fall 2016	93.00	CC-0019	Michael Chopra

Tip

You might notice that the Courses object has two fields that are identically named Course ID. (If you drag both Course ID fields into the Preview, it's easy to tell which is which.) One is a standard system field in Salesforce that uniquely identifies each course with a 15-character ID. The other is an EDA field that your school uses to uniquely identify each course, such as ECON 101. For ease of use in this report, we recommend selecting the more human-readable, EDA Course ID field.



Course ID	Course ID
a0541000007Xywv	ECON 101

Great work so far. By setting up a custom report type, we've gotten Salesforce to determine all current students that could potentially be included in our list. By customising the report with additional fields, we can easily see that some students are not B.S. Business majors, or are but don't meet our course and grade criteria. Let's narrow our results to exclude them, using report filters.

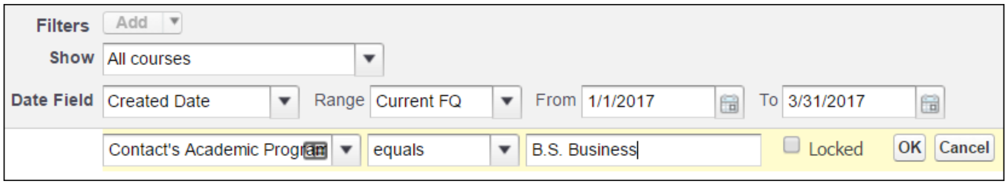
Create Filters for Academic Programme, Course, and Grade

Let's apply a few filters to narrow our list to only the students pursuing a B.S. in Business, who earned a B grade or higher in Economics 101.

1. Add a filter for Academic Programme.

   a. Click **Add** next to the Filters option.

   b. Set the filter: Contact's Academic Program: Account Name equals `B.S. Business`.

   c. Click **OK**.

2. Add another filter for the course, Economics 101.

   a. Click **Add** next to the Filters option.

   b. Set the filter: Course ID equals `ECON 101`.

   c. Click **OK**.

3. Add another filter for Grade.

   a. Click **Add** next to the Filters option.

   b. Set the filter: Grade greater or equal `80.00`.

   c. Click **OK**.

4. Check your filtered results in the Preview pane. Only the students who meet your criteria should display.

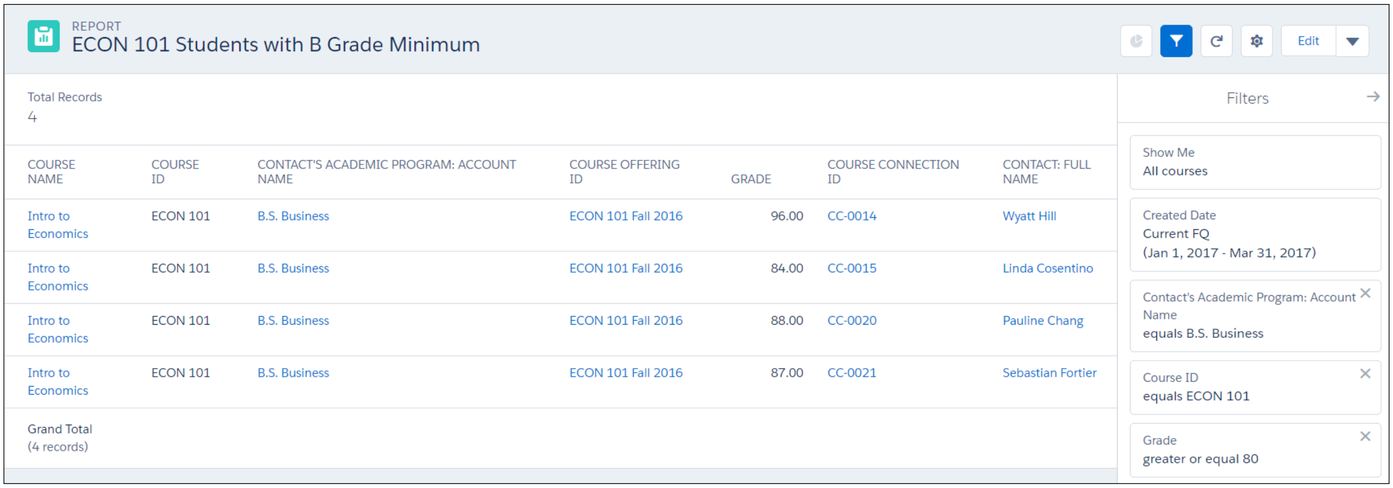
   Note
   Make sure that the report options under Filters aren't restricting your data. For example, make sure that the Show menu is set to All Accounts, and the Date Range is set to All Time, so that your report includes all possible results, regardless of who created the records, or when.

5. Click **Save** to preserve your hard work on this report. Save it with a name like “ECON 101 Students with B Grade Minimum” and a description to make it easy to find in a Reports folder.

6. Click **Save**. You can return to this report over and over again, and it will update automatically with any data you add or edit.

7. Click **Run Report**.

Here you have it. A report of current B.S. Business students who earned a B or better in ECON 101. (In this example, there are four students.)


REPORT
ECON 101 Students with B Grade Minimum

Total Records
4

COURSE NAME	COURSE ID	CONTACT'S ACADEMIC PROGRAM: ACCOUNT NAME	COURSE OFFERING ID	GRADE	COURSE CONNECTION ID	CONTACT: FULL NAME
Intro to Economics	ECON 101	B.S. Business	ECON 101 Fall 2016	96.00	CC-0014	Wyatt Hill
Intro to Economics	ECON 101	B.S. Business	ECON 101 Fall 2016	84.00	CC-0015	Linda Cosentino
Intro to Economics	ECON 101	B.S. Business	ECON 101 Fall 2016	88.00	CC-0020	Pauline Chang
Intro to Economics	ECON 101	B.S. Business	ECON 101 Fall 2016	87.00	CC-0021	Sebastian Fortier
Grand Total (4 records)						

With all of the filtering options available in Salesforce reports, you can now take what you've learned from this use case and apply it broadly to similar situations to support student (and B school recruiter) success.

Create a List of Parents

In this common use case doc, we'll show you how to create a list of parents who have business affiliations that could help students with networking and job placement.

Introduction

In this article, we show you a use case about tapping into the professional networks of your students' parents.

See how an advisor at the school's career centre uses Salesforce and the Education Data Architecture (EDA) to sift through relationship and affiliation data to match students with potentially valuable career connections at a great local company. Our goal is to identify the parents and students we want to invite to a networking event, where they can chat about internships, jobs, and what it's like to work for the company.

What you're looking for:

- A list of parents
- Who work for a major employer in the region
- That is interested in hiring undergraduate Business students with at least a 3.0 GPA

First, we'll review the use of relationships in EDA. which is a powerful way to track all of the relationships that matter to your students—with moms and dads being among the most important ones. Then we'll use a standard EDA report to identify the parents we're interested in. You'll see how we use joined reports in Salesforce to combine the parental affiliations data with student data that meet your criteria.

Important

The explanations and data analyses we provide in this article assume that you're already familiar with the various components of EDA . If you haven't done so already, read through all of the EDA documentation related to building your architecture before you move on.

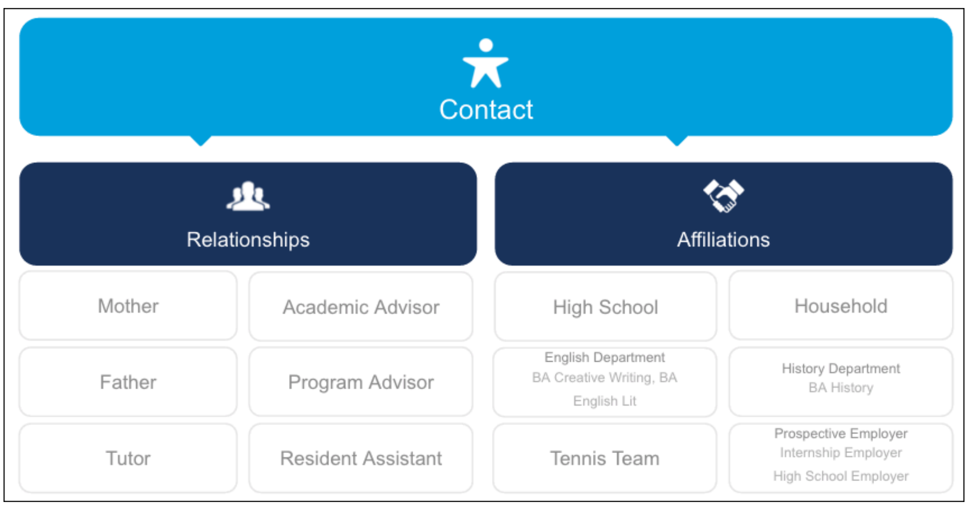
Relationships and Affiliations: A Quick Review

In this section we'll review how EDA stores information about Contacts and their relationships with other Contacts and Accounts.

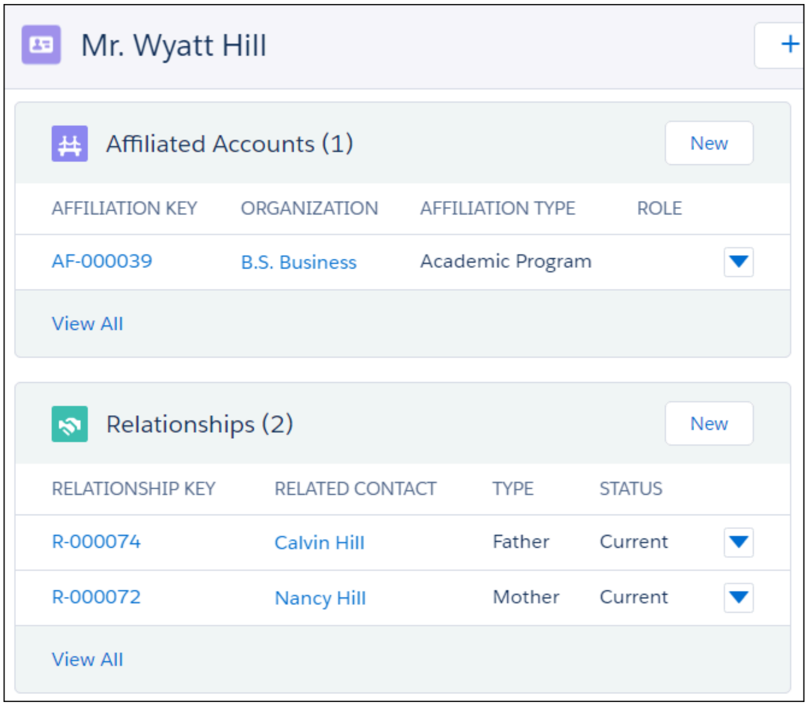
In the EDA Account model, two custom objects work in conjunction with your Contacts:

- Relationships, which help you track relationships between Contacts
- Affiliations, which help you track affiliations between Contacts and other Accounts

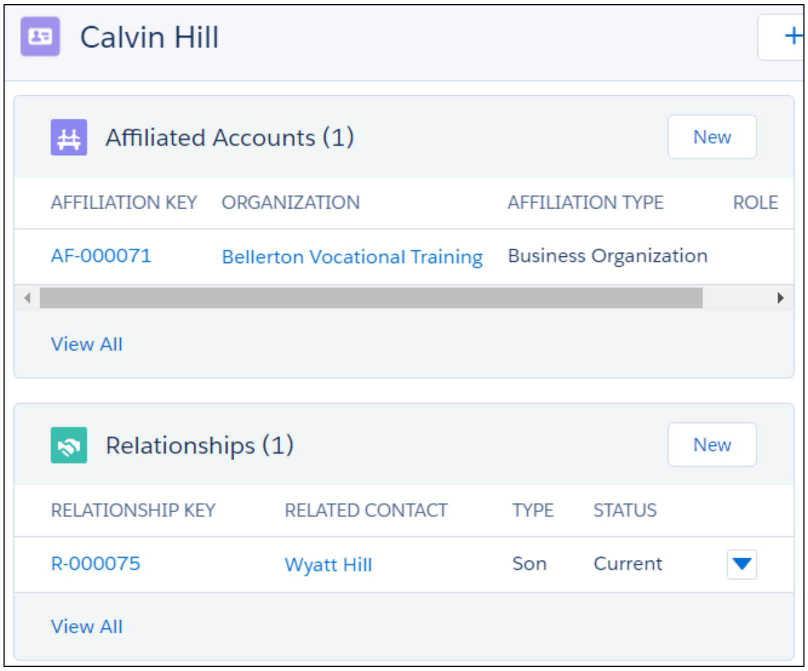
This diagram shows the concept of Relationships and Affiliations for a student.



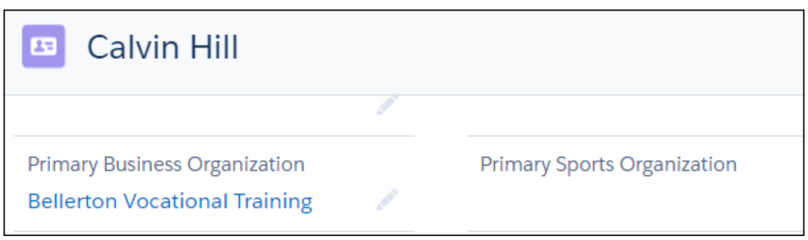
For a concrete example, let's look at the Contact record for our student, Wyatt Hill.



You can see in the Affiliated Accounts related list that Wyatt is majoring in B.S. Business. In the Relationships related list, you see his parents. Just like Wyatt is a Contact, his parents are also tracked as Contacts in EDA. If you were to click through on his father's name, you'd see in Calvin's Contact record his reciprocal relationship with his son. You'd also see that Calvin has an Affiliated Account with Bellerton Vocational Training, which happens to be his employer.



In the details of Calvin's Contact record, because he works for Bellerton Vocational Training, it's listed as his Primary Business Organisation. In EDA, this type of Affiliation is a Primary Affiliation for the Business Organisation record type.



We're now going to use this essential piece of affiliation data to find out which of our parents have connections to one of the region's biggest employers. Doing outreach, facilitating networking, and potentially matching students with internships and jobs is a whole lot easier thanks to EDA and Salesforce reports.

If you want to follow along as our career advisor uses Salesforce reports to create the invitee list for the networking event, you'll need to first create sample data in your org for about a dozen students and their parents. For maximum efficiency, we recommend creating records in this order.

1. If you previously created sample data for the Create a List of Current Students use case, you can reuse those student records. If not, complete the sample data setup steps 1 through 5 in that use case, and then continue with the steps here.

2. Create at least two Account records to represent the different companies that are the parents' employers. Choose the **Business Organisation** record type. Name one of the accounts, "The Fullerton Company," to match the main employer in our use case.
3. Create a couple dozen Contact records to represent the parents. When creating each Contact record, set the Primary Business Organisation field to one of the companies (Accounts) that you created in the previous step. In our use case, four parent individuals work for The Fullerton Company.
4. From either the student's Contact record or the parent's, create Relationship records so that every student has relationships with a pair of parents.
5. For the half-dozen or so students who are B.S. Business majors, go to their Program Enrolments and assign them a range of GPAs, including a couple that are less than 3.0 (so that you can see filtering by GPA later).

If you'd rather not set up this sample data right now, you're welcome to just sit back and watch as our career advisor works with the data.

Create a Relationships with Contact Report

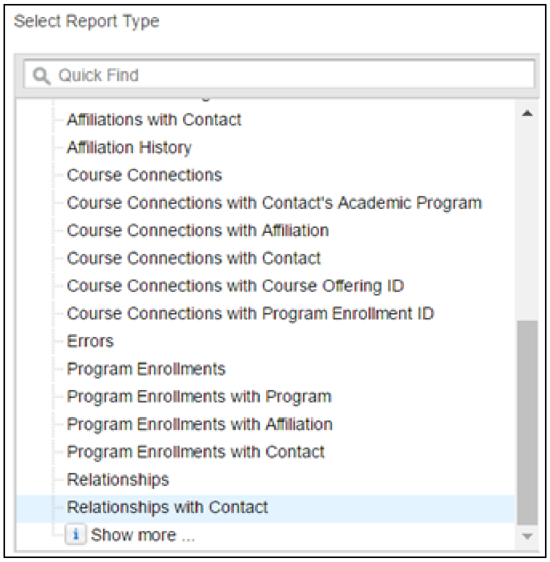
Let's create our report using EDA's Relationships with Contact standard report type.

It shows us contact relationships, so that we can mine the rich network of connections amongst our parents.

> **Note**
> The procedures in this document are written for the Salesforce Classic user interface. If you're using the Lightning Experience interface and want to follow along with the steps in this use case, switch to Salesforce Classic so that you can access joined reports.

1. Click the Reports tab. (If you don't see the Reports tab, from the App Launcher, find and select **Reports**.)
2. Click **New Report**.

3. Expand the Other Reports folder and select the **Relationships with Contact** report type.



4. Click **Create**. The resulting report is skeletal and not that useful in its out-of-the-box format. Let's fix that.

Preview Tabular Format ▼ Show ▼ Remove All Columns

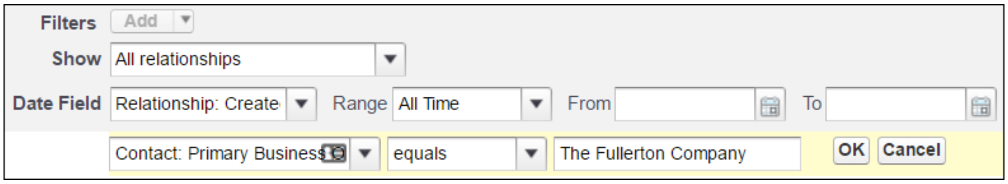
Relationship: Relationship Key	Contact: Last Name
R-000048	Chang
R-000050	Chang
R-000060	Wedemeyer

5. Drag fields into and out of the Preview pane of the report builder so that you end up with these fields in your report.
   - **Contact: First Name**
   - **Contact: Last Name**
   - **Contact: Primary Business Organisation**
   - **Related Contact**
   - **Type**

Preview Tabular Format ▼ Show ▼ Remove All Columns

Contact: First Name	Contact: Last Name	Contact: Primary Business Organization	Related Contact	Type
Pauline	Chang	-	Theresa Chang	Mother
Pauline	Chang	-	Linus Chang	Father
Jessica	Wedemeyer	-	Audrey Wedemeyer	Mother

6. Add a filter to narrow our list to only the parents who work for our region's largest employer, The Fullerton Company.
   a. Click **Add** next to the Filters option.
   b. Set the filter: Contact: Primary Business Organisation equals `The Fullerton Company`.



   c. Click **OK**.
7. Check your filtered results in the Preview pane. Only the parents who meet your criteria should display.

Preview   Tabular Format   Show   Remove All Columns

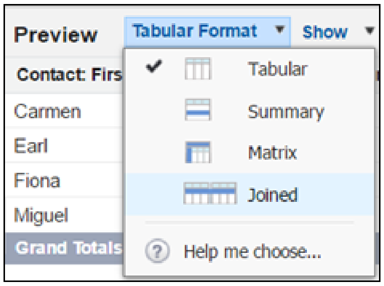
Contact: First Name	Contact: Last Name	Contact: Primary Business Organization	Related Contact	Type
Carmen	Rodriguez	The Fullerton Company	Vanessa Rodriguez	Daughter
Earl	Reedley	The Fullerton Company	Dwayne Reedley	Son
Fiona	Young	The Fullerton Company	Barbara Young	Daughter
Miguel	Gutierrez	The Fullerton Company	Matt Gutierrez	Son
Grand Totals (4 records)				

Note
Make sure that the report options under Filters aren't restricting your data. For example, make sure that the Show menu is set to All Relationships, and the Relationship: Created Date date range is set to All Time, so that your report includes all possible results, regardless of who created the records, or when.

Add a Joined Report with Programme Enrolment Information

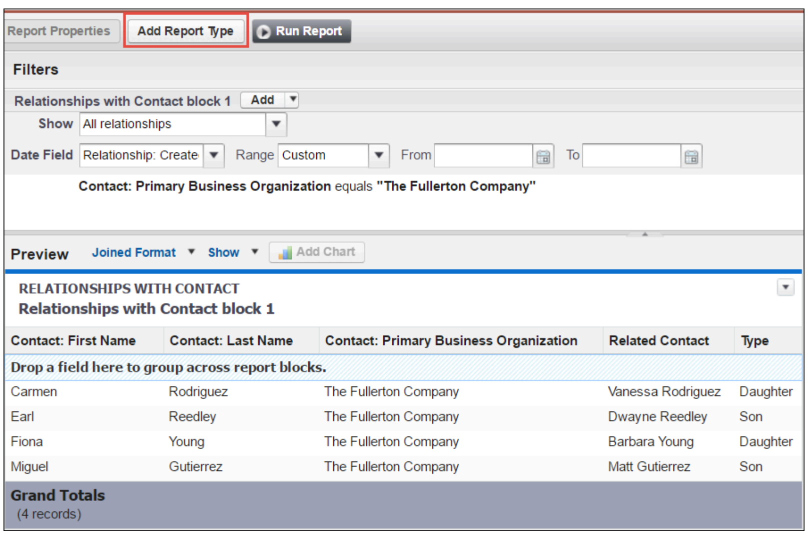
Now that we have data about the parents who work for The Fullerton Company, let's turn our attention to the students that we might want to match with this employer.

1. From the report format menu that currently shows Tabular Format, select **Joined**.

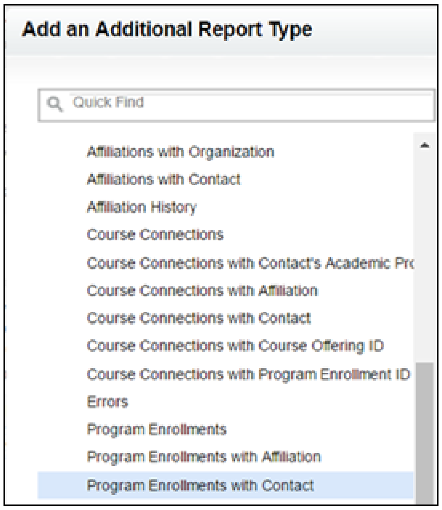


> **Note**
> If you don't see the Joined option, make sure that you're working in the Salesforce Classic user interface, not Lightning Experience. Joined reports are available only in Salesforce Classic.

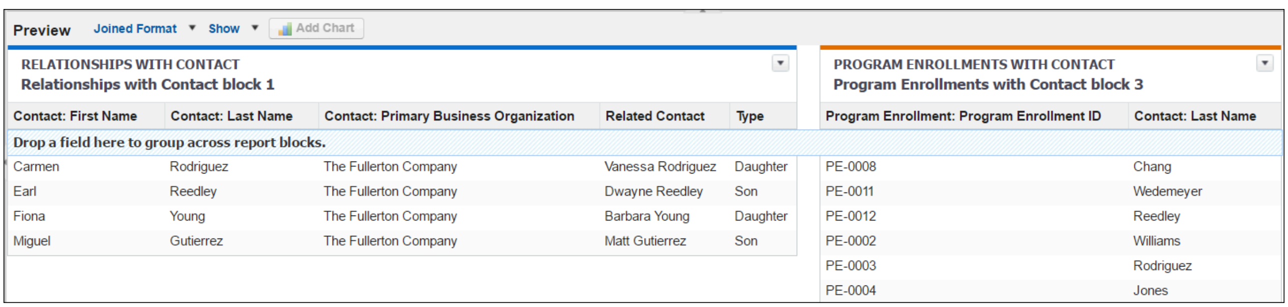
2. In the joined report view, click **Add Report Type**.



3. Expand the Other Reports folder and select the **Program Enrolments with Contact** report type. (If you don't see this report type, click **Show more ...** at the bottom of the list.)



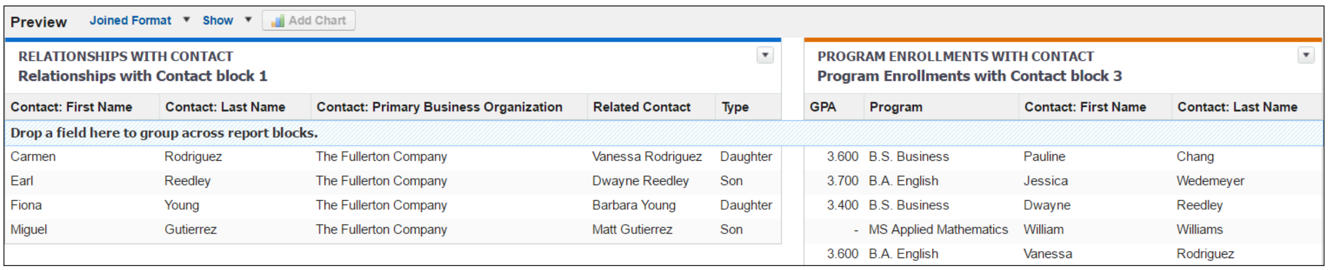
4. Click **OK**. Notice that a new block appears in the report.



Also notice that the Fields pane updates with a new area that contains fields unique to the report type.

5. Drag fields into and out of the Programme Enrolments with Contact block so that you end up with these fields in that block.

   - **GPA**
   - **Programme**
   - **Contact: First Name**
   - **Contact: Last Name**



Contact: First Name	Contact: Last Name	Contact: Primary Business Organization	Related Contact	Type
Carmen	Rodriguez	The Fullerton Company	Vanessa Rodriguez	Daughter
Earl	Reedley	The Fullerton Company	Dwayne Reedley	Son
Fiona	Young	The Fullerton Company	Barbara Young	Daughter
Miguel	Gutierrez	The Fullerton Company	Matt Gutierrez	Son

GPA	Program	Contact: First Name	Contact: Last Name
3.600	B.S. Business	Pauline	Chang
3.700	B.A. English	Jessica	Wedemeyer
3.400	B.S. Business	Dwayne	Reedley
-	MS Applied Mathematics	William	Williams
3.600	B.A. English	Vanessa	Rodriguez

Create Filters for GPA and Programme

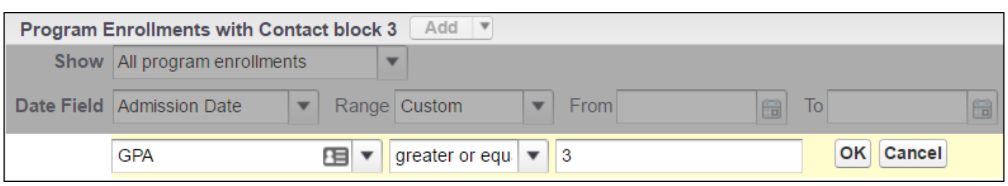
We're almost there.

Our last task is to filter for Business majors with a minimum GPA that The Fullerton Company prefers to see when considering student hires.

1. Add a filter for GPA.

   a. Click **Add** next to the Filters option.

   b. Set the filter: GPA greater or equal `3`.

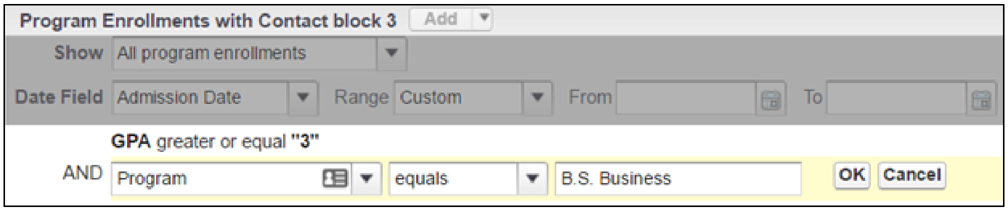


   c. Click **OK**.

2. Add another filter for Business majors.

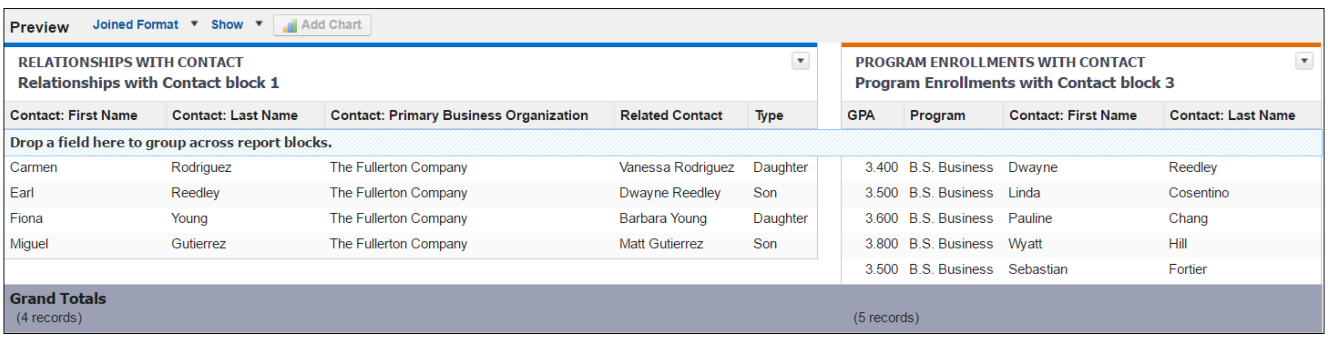
   a. Click **Add** next to the Filters option.

   b. Set the filter: Program equals `B.S. Business`.



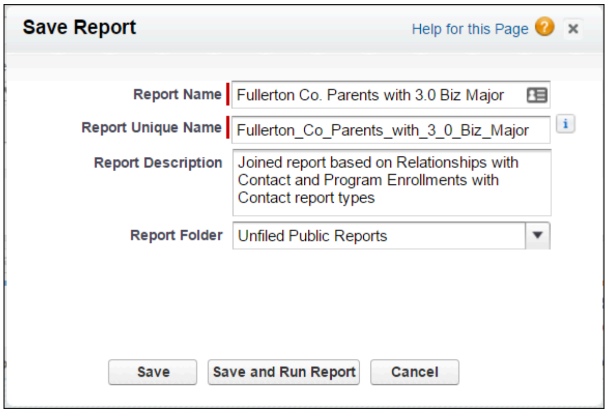
   c. Click **OK**.

3. Check your filtered results in the Preview pane. Only the students who meet your criteria should display.

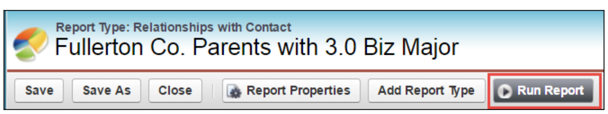


> **Note**
>
> Make sure that the report options under Filters aren't restricting your data. For example, make sure that the Show menu is set to All Program Enrolments, and the Date Range is set appropriately, so that your report includes all possible results, regardless of who created the records, or when.

4. Click **Save** to preserve your hard work on this report. Save it with a name like “Fullerton Co. Parents with 3.0 Biz Major” and a description to make it easy to find in a Reports folder.



5. Click **Save**. You can return to this report over and over again, and it will update automatically with any data you add or edit.
6. Click **Run Report**.



And just like that, you have a report of the parents who work at The Fullerton Company combined with a report of the current B.S. Business students who have at least a 3.0 GPA. (In this example, there are four such parents and five such students.)

With this type of data at your fingertips, creating highly personalised, targeted outreach campaigns becomes a much simpler task. You can see how EDA makes it easy to tap into your constituents' networks and help students make important career connections.

Create a List of Alumni

In this common use case doc, we'll show you how to identify alumni who meet certain criteria.

Introduction

In this article, we walk you through a use case about connecting with your school's former football (the kind with hands, not feet) athletes.

We're kicking off a team fundraiser to coincide with the season's home opener, which is just a few weeks from now. We'll identify alumni who are likely supporters, based on their past participation in our beloved football team (go Panthers!). See how the head coach uses Salesforce and the Education Data Architecture (EDA) to drum up support for the team.

What you're looking for:

- A list of alumni
- Who were affiliated with the football team

To arrive at our list, we'll briefly review the use of Accounts and Affiliations in the data architecture. Then we'll set up cross filters on a Contacts & Accounts report to filter for our alumni.

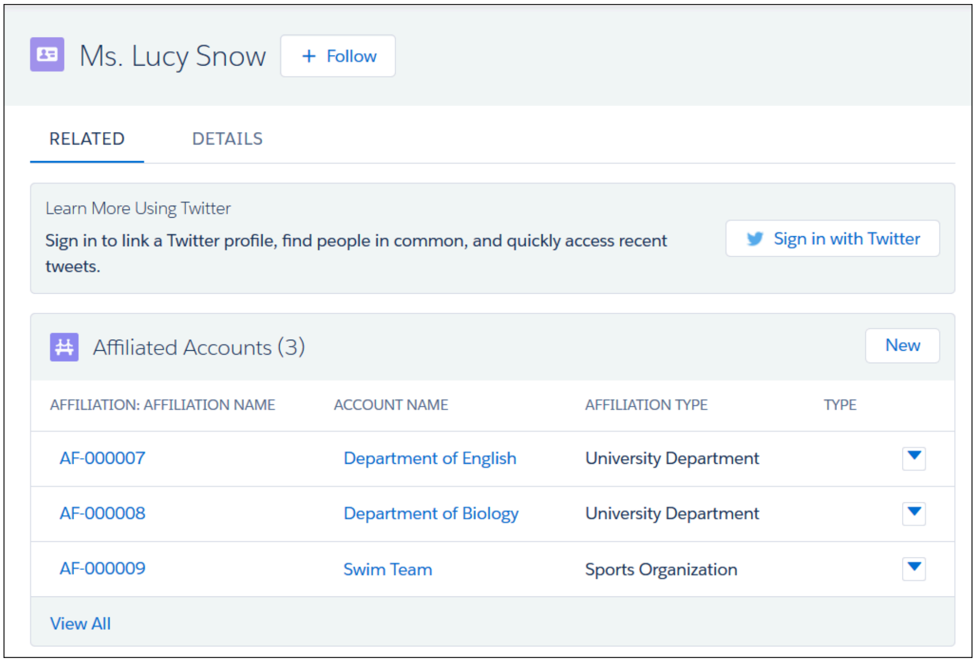
> **Important**
> The explanations and data analyses we provide in this article assume that you're already familiar with the various components of EDA . If you haven't done so already, read through all of the EDA documentation related to building your architecture before you move on.

Football Alumni Data: Affiliations

Let's get back to basics first.

EDA represents students as ***Contacts***, and organisations (such as academic departments, sports organisations, and even the university itself) as ***Accounts***. An Account is connected to a Contact through an ***Affiliation***. For example, this type of connection tells you that a student is an athlete on the swim team.

On the student's Contact record, the summary of Affiliated Accounts looks something like this:



Affiliations are a powerful organising concept and are central to this use case. You're about to see how the Panthers' coach uses affiliations and Salesforce reports to create the list of football alumni. If you want to follow along, you'll need to first create some sample data in your org for current students, alumni, and their affiliations with the football team. For maximum efficiency, we recommend creating records in this order.

1. If you previously created sample data for the Create a List of Current Students use case, you can reuse those student records. If not, create a half dozen Contact records to represent current students (you just need first and last names), and then continue with the steps here.
2. Create another half dozen Contact records to represent alumni. You just need first and last names. If you want to see Contacts' addresses and email addresses in the resulting report–which you'd of course want for an actual fundraising campaign–you can also fill out those fields for a more realistic experience. You'll get the gist even if you don't.
3. Create an Account record to represent the football team. Choose the **Sports Organisation** record type.
4. For at least a few of the current students, create an Affiliated Account record with Organisation as the football team and Status as Current.

5. For at least half of the alumni, create an Affiliated Account record with Organisation as the football team and Status as Alumni.

> **Note**
> In the real world, you would likely also set the Role field to Athlete, so that you could later filter on this field to distinguish athletes from other types of team affiliations (such as coaching staff or mascots). In this use case, to save you a few clicks, we assume that Contact records that have the football team affiliation are either current or former team athletes.

Setting up this sample data is optional. If you'd rather skip the data entry, now's a great time to take a seat in the bleachers, get cosy under your stadium blanket, and spectate while our head coach gets to work identifying alumni.

Create a Contact & Accounts Report

Let's create our report using a standard Salesforce report, Contacts & Accounts.

1. Click the Reports tab. (If you don't see the Reports tab, from , find and select **Reports**.)
2. Click **New Report**.
3. Expand the Accounts & Contacts folder and select the Contacts & Accounts report type.
4. Click **Create**.

Preview Tabular Format ▼ Show ▼ Remove All Columns

Salutation	First Name	Last Name	Title	Mailing Street	Mailing City
-	Robin	Reddy	-	4689 Petaluma Boulevard North	Petaluma
-	Stacy	Fleetfoot	-	Hoover Avenue	Burlingame

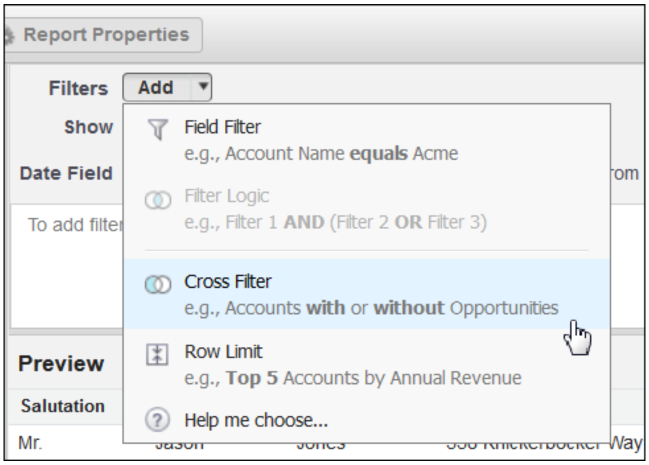
As you can see from the preview, this report works well for our purposes. It's already set up with address and other contact information that we'll need for a fundraising campaign.

Create a Cross Filter for Football Affiliations

The out-of-the-box report gives us Contacts with Accounts.

We're interested in EDA-specific Affiliated Accounts, because we're honing in on our alumni's affiliations with the football team. Adding a Cross Filter lets us narrow the list from all Contacts to our football-faithful Contacts.

1. In the new, unsaved report, click the Filters drop down menu, and add a new Cross Filter.



2. Set the new Cross Filter to Contacts with Affiliated Accounts.
3. Click **Add Affiliated Accounts Filter**, and add the following filters:
   - Affiliation Type equals `Sports Organisation`
   - Organisation equals `Football Team`
4. Click **OK**. Check your filtered results in the Preview pane. Only footballers should display.

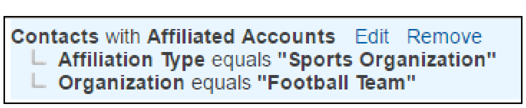
> **Note**
> Make sure that the report options under Filters aren't restricting your data. For example, make sure that the Show menu is set to All accounts, and the Contact: Created Date date range is set to All Time, so that your report includes all possible results, regardless of who created the records, or when.

The report shows all students who have a football affiliation, which includes past, present, and even future students (our head coach recruits high school students and transfer students to maintain a healthy pipeline of Panther prospects). For our upcoming fundraising campaign, we want to contact alumni only. So, let's narrow the results further.

Narrow Results to Alumni Only

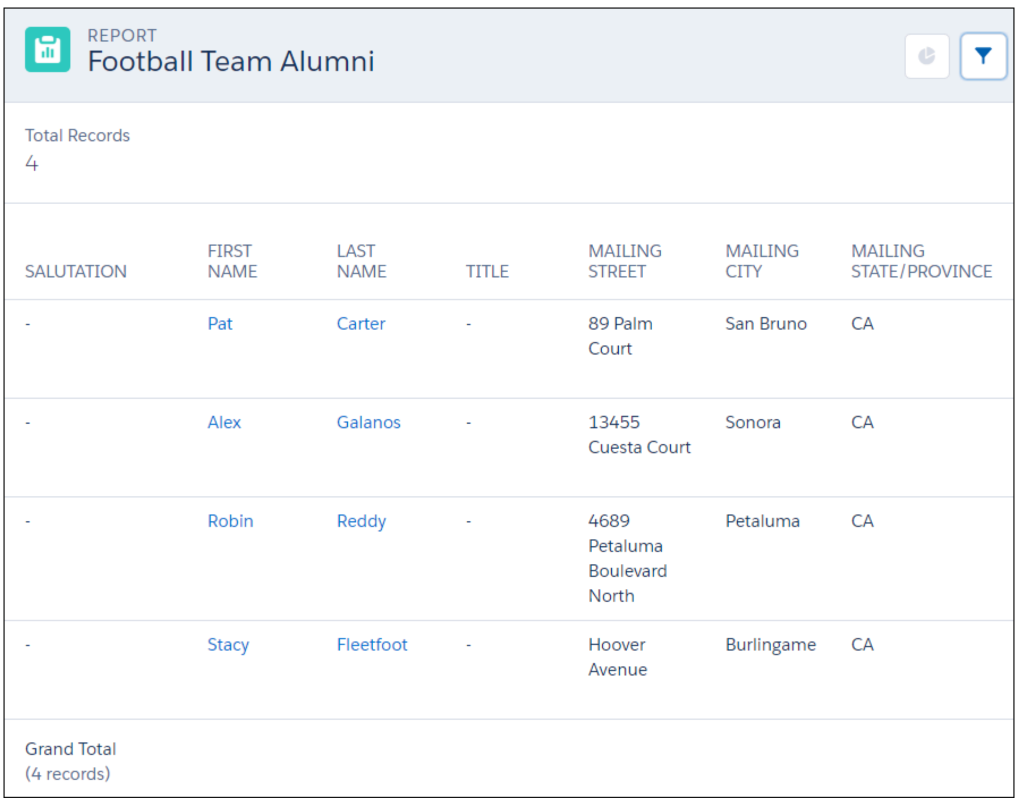
To narrow our list to alumni only, we simply edit the cross filter to add one more criteria.

1. Hover over the cross filter that you just created, and click **Edit**.



2. Click Add Affiliated Accounts Filter, and add the following filter:
   - Status equals `Alumni`
3. Click **OK**.
4. Check your filtered results in the Preview pane. Now, only the football alumni should display. Way to go, Coach! This report gives us exactly the alumni data that we want. Just a few more yards to go before we're in the end zone.
5. Click **Save**. Save it with a name like “Football Team Alumni” and a description to make it easy to find in a Reports folder.
6. Click **Save**. You can return to this report over and over again, and it will update automatically with any data you add or edit.
7. Click **Run Report**.

All done. The Panthers coach has earned some high fives for creating this football alumni report. (In this example, there are four such alumni.) Coach even made it look easy.



REPORT
Football Team Alumni

Total Records
4

SALUTATION	FIRST NAME	LAST NAME	TITLE	MAILING STREET	MAILING CITY	MAILING STATE/PROVINCE
-	Pat	Carter	-	89 Palm Court	San Bruno	CA
-	Alex	Galanos	-	13455 Cuesta Court	Sonora	CA
-	Robin	Reddy	-	4689 Petaluma Boulevard North	Petaluma	CA
-	Stacy	Fleetfoot	-	Hoover Avenue	Burlingame	CA

Grand Total
(4 records)

With this report in hand, Coach heads off to enlist the team's help with stuffing envelopes for the fundraising campaign. As you can see, EDA is key to another well-funded season for the Panthers, and key to cultivating connections with your alumni community.

Post Script . . .

On the eve of the publication of this article, we learned that our dear friend and colleague, Dave Perry, passed away suddenly.

Dave was not only instrumental in helping us develop these use cases, but as the Technical Architect for EDA was instrumental in the development of the architecture itself. Dave was a lover of higher ed, a lover of Salesforce, and a lover of how the two together could help make the world a better place. We would like to dedicate this use case series to Dave's memory, and know that he'd appreciate a small tribute in a piece of technical documentation probably better than anything else. Thanks for everything, Dave . . . you will be deeply missed.

Analyse Student Enrolment with Office of the President Tableau Accelerator

Bring enrolment insights into one place and discover trends in campus diversity.

Learn About the Office of the President Tableau Accelerator

You can use the Office of the President Tableau Accelerator with Salesforce to help create a diverse and inclusive campus that fosters innovation and collaboration.

Lack of diversity can discourage under-represented students from enrolling, or make them feel alone on campus. With these dashboards, you can use filters to see historical trends in enrolment and degrees earned across diversity groups. Stakeholders can use this information to understand how your institution's student population is changing, set goals to increase diversity, and evaluate the impact of diversity initiatives.

See Salesforce Education Cloud Office of the President.

Understand the Data Model Requirements

In general, the dashboards use a generic data model that can easily fit the needs of most institutions.

The dashboards show data from these objects:

- Account

- Contact
- Course Connection
- Course Offering
- Education History
- Programme Enrolment
- Term

Tip
To view a visual representation of the data model in Tableau, click the **Data Source** tab.

Here's how to model the data and structure it in EDA.

Term Enrolment

The dashboards use the Course Connection object to calculate historical enrolment for students (Contacts). Course Connections are associated with the Course Offering object, which has a lookup relationship to the Term object. In addition, Terms must have an associated Parent Term that relates to a school year.

Purpose	Object	Field	Related Object	Relationship Field on Related Object
Establish a relationship between students and courses.	Contact	Contact ID	Course Connection	Contact
Establish a relationship between courses and Course Offerings, which are mapped to Terms.	Course Connection	Course Offering ID	Course Offering	Id
Provide access to the name and dates for Terms.	Course Offering	Term	Term	Id

Purpose	Object	Field	Related Object	Relationship Field on Related Object
Establish a relationship between Terms and Parent Terms (for example, between Fall 2020 Term and 2020-2021 Parent Term).	Term	Parent Term	Id	Term

Academic Program

The dashboards use the Programme Enrolment object to identify students who are pursuing degrees.

Purpose	Object	Field	Related Object	Relationship Field on Related Object
Identify students who have Programme Enrolment records.	Contact	Contact ID	Programme Enrolment	Contact
Pull the Programme name related to the Programme Enrolment record.	Programme Enrolment	Programme	Account	Id

Graduation

The dashboards use the Education History object to identify the graduation date for students who have earned degrees.

Purpose	Object	Field	Related Object	Relationship Field on Related Object
Establish a relationship between students and their Education History record.	Contact	Contact ID	Education History	Contact

Institution

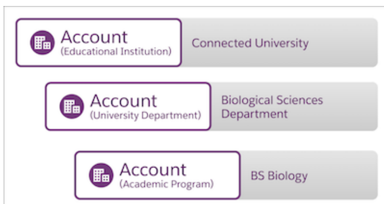
The dashboards make three queries to the Account object. The data model requires that you structure your Academic Programs in this way:

- Programme (record type is Academic Programme)

- Department (record type is University Department)
- Institution (record type is Educational Institution)

For example, the Biological Sciences department at Connected University offers a Bachelors of Science (B.S.) in Biology. Here's how Account records represent these entities.

- Connected University is an Account with the Educational Institution record type.
- The Biological Sciences department is an Account with the University Department record type.
- The B.S. in Biology is an Account with the Academic Programme record type. The Biological Sciences department administers this degree, so the Academic Program's parent Account is the department's Account record.



For more details, see Model Your Institutional Account Structure.

Connect Salesforce to Tableau

After you have a Tableau account, connect it to EDA to start with our ready-made dashboards.

If you're new to Tableau, purchase at least one Creator licence to get started. You can also start a free 14-day trial.

Connect using either Tableau Online or Tableau Desktop.

Use Tableau Online

1. Go to Tableau Online and log in.
2. On the home page, click **Accelerator dashboard**. If you don't land on the home page, click **Home**, and then click **See All**.
3. On the Starters page, set your Data Sources filter to **Salesforce**.
4. Click **Office of the President Dashboard Starter**.
5. Click **Sign in to Salesforce** and log in.

Use Tableau Desktop

1. Download the Office of the President Accelerator from Tableau Exchange .
2. Open Tableau Desktop.

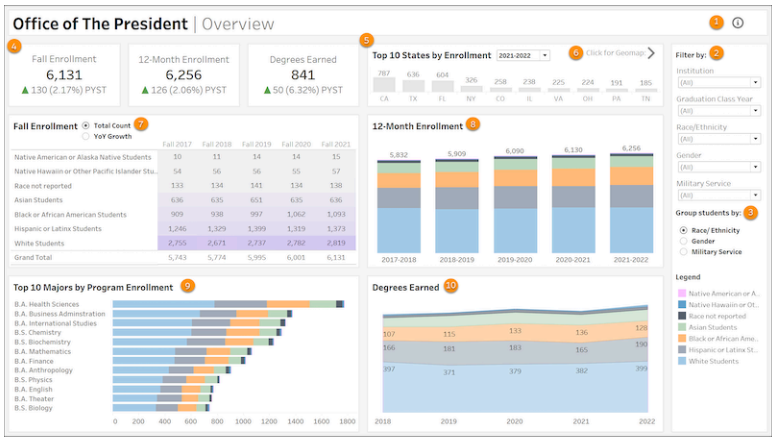
3. From the Tableau Desktop home page, click **Open a Workbook**.
4. In the Data menu, select each data source that you want to share access, and then select **Edit Data Source**.
5. Log in and select **Allow** to give access to your data.

Explore the Dashboards

The Office of the President Dashboard Starter includes two prebuilt dashboards.

Office of the President Overview

Get a high-level view of your institution’s diversity and inclusion metrics using the Overview dashboard. To view this dashboard, select the **Office of The President Overview** tab.

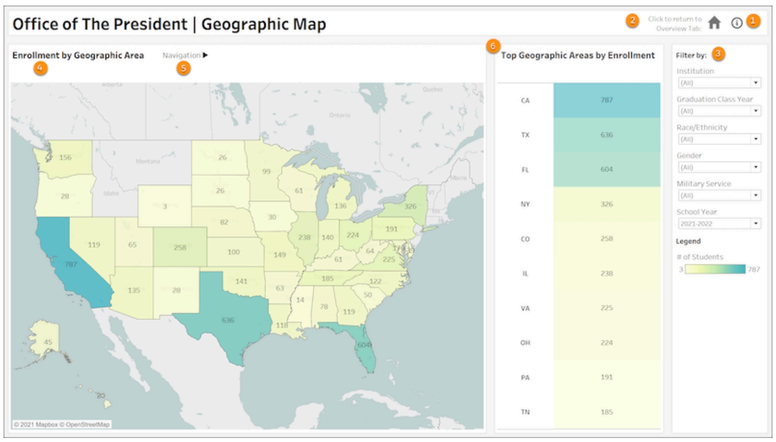


- Hover over the icon to learn about this dashboard and how you can use the reporting data (1).
- Filter data by Institution, Graduation Class Year, Race/Ethnicity, Gender, or Military Service (2).
- Group students in the charts and graphs (3). Your selection doesn't affect the KPI tiles or the Top 10 States by Enrolment chart.
- KPI tiles showing Fall Enrolment, 12-Month Enrolment, and Degrees Earned compared to the prior year's same time period (4). For example, the tiles compare Fall 2021 to Fall 2020. PYST stands for Prior Year, Same Term.
- The top 10 U.S. states with the highest enrolment (5). Use the menu bar to show data for a particular school year. Click a state to open the Geographic Map dashboard, and view data by state, county, and ZIP code.
- Open the Geographic Map dashboard to view enrolment data by geographic regions (6).
- Fall Enrolment over the last five years by selected group (7). You can display the total count or year-over-year growth. Hover over values for additional information.

- The 12-Month Enrolment over the last five school years (8) by selected group. Hover over values for additional information.
- The top 10 majors by programme enrolment (9) by selected group. Hover over values for additional information.
- Degrees Earned over the last five years (10) by selected group. Hover over values for additional information.

Geographic Map

Access an interactive map to see Enrolment by state, county, and zip code.



- Hover over the icon to learn about this dashboard and how you can use the reporting data (1).
- Click the **Home** icon to return to the Overview dashboard (2).
- Filter by Institution, Graduation Class Year, Race/Ethnicity, Gender, Military Service, or School Year (3).
- Enrolments by U.S. state by number of students enrolled in a given geographic area (4). Click a state for more detailed enrolment data for related counties and ZIP codes.
- Click the **Navigation** menu to move up or down after selecting a state, county, or ZIP code (5).
- Enrolment data for the top 10 geographic areas in your current view (6). By default, the top 10 states with the most students enrolled are shown. When you click a county or ZIP code, the list shows the top 10 counties or ZIP codes with the most students enrolled.
- Select a state, county, or ZIP code for more detailed data (5).

Best Practices for Using and Maintaining Your Dashboards

Get the most out of your data analyses by adhering to proven strategies.

- Keep your dashboards fresh with current data from Salesforce. See Keep Data Fresh in Tableau Help.
- Customise your dashboards with formatting to enhance analysis and presentation. You can also remove filters that aren't relevant and add your own. See Format Your Work in Tableau Help.
- Export Tableau data to various image file types for use in presentations or other communications.
- If you need help, log a support case with Tableau.

Analyse Application Data with the IPEDS Tableau Accelerator

Bring application insights into one place and discover trends in your admissions cycle by using the Integrated Postsecondary Education Data System (IPEDS) Tableau Accelerator.

Learn About the IPEDS Tableau Accelerator

The IPEDS Tableau Accelerator with Salesforce allows you to compare acceptance rates, yield rates, enrolment, and awards/degrees between institutions.

It also allows you to compare acceptance rates, yield rates, enrolment, and completions between IPEDS and your institution’s Salesforce data.

See Salesforce Education Cloud IPEDS Accelerator.

Understand the Data Model Requirements

Learn about the IPEDS data sources and structure so that you can put IPEDS to work effectively at your institution.

The following IPEDS data sources have been built with Tableau Prep Builder and are embedded in the Accelerator:

- Admissions (ADM) for 2018, 2019, and 2020
- 12-Month Enrolment (EFFY) for 2018, 2019, and 2020
- Completions (C) for 2018, 2019, and 2020
- Institutional Characteristics (HD)

To add more years, beyond 2018, 2019, and 2020, to the data sources, you have two options:

- Wait for the new IPEDS Tableau Accelerator to be published on the Tableau Exchange.

- Manually update the data sources:
  1. Download the flow from Tableau Exchange.
  2. Download the files from IPEDS.
  3. Open the flow in Tableau Prep Builder.
  4. Rebuild the data sources with the new IPEDS files.

The workbook also shows data from these Salesforce objects for the four dashboards that start with IPEDS + SF:

- Account with Academic Programme and Educational Institution record types
- Address
- Application
- Contact
- Education History
- Term
- User

In addition, the model also uses geomarket codes from the College Board.

Tip
To view a visual representation of the data model in Tableau, click the Data Source tab.

In general, the dashboards use a generic data model that can easily fit the needs of most institutions. Here's how the data needs to be modelled and structured in your org.

Application and User

To filter data in the dashboard by staff member or manager, you have User records structured using this parent-child relationship.

- User
  - User

    Application records specify an Owner (OwnerId) field that points to an employee at your institution. In addition, each User record specifies another employee in the Manager (ManagerId) field.

Note
The data model requires that employees, not applicants, own Application records.

Let's look at how this model works for a recruiter named Cali Nguyen.

Application Record

Application Name	Applicant	Applying To	Owner
APP-0123	Marla Gianni	B.S. Computer Science	Cali Nguyen

User Record

Name	Title	Manager
Cali Nguyen	Admissions Recruiter	Dimitri Trapalis
Dimitri Trapalis	Admissions Director	--

Application and Account (for Academic Programs)

To filter data in the dashboard by program, you have Account records structured using this parent-child relationship.

- Institution (record type is Educational Institution)
  - Department (record type is University Department)
    - Programme (record type is Academic Programme)

      The programme Account record is specified in the Applying To field on the Application record.

Let's look at how this model works for a student named Marla Gianni.

Application Record

Application Name	Applicant	Applying To	Application Status
APP-0123	Marla Gianni	B.S. Computer Science	Incomplete

Account Records

Account Name	Account Record Type	Parent Account
B.S. Computer Science	Academic Program	Department of Computer Science
Department of Computer Science	University Department	Connected University

Account Name	Account Record Type	Parent Account
Connected University	Educational Institution	--

Education History and Account (for Educational Institutions)

To filter data in the dashboard by High School District or High School, you have Account records structured using this parent-child relationship.

- District (record type is Educational Institution)
  - High School (record type is Educational Institution)

    The high school's Account is specified in the Educational Institution Account (hed__Account__c) field of the Contact's related Education History record.

If you're not using Accounts to identify school districts, you can still filter for high schools. Also, keep in mind that there's no qualifying logic to determine if the Account is for a high school. Therefore, college-related data can show up in the High School filter.

Let's look at how this model works for a student named Marla Gianni.

Education History Record

Education History Name	Contact	Educational Institution Account
EH-1234	Marla Gianni	Trailhead Academy High School

Account Records

Account Name	Account Record Type	Parent Account
Trailhead Academy High School	Educational Institution	Village East School District
Village East School District	Educational Institution	--

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Connect using either Tableau Online or Tableau Desktop.

Use Tableau Online

1. Go to Tableau Online and log in.

2. On the home page, click **Accelerator Dashboards**. If you don't land on the home page, click **Home**, and then click **See All**.
3. On the Starters page, set your Data Sources filter to **Salesforce**.
4. Click **IPEDS Tableau Accelerator**.
5. Click **Sign in to Salesforce** and log in.

Use Tableau Desktop

1. Download the IPEDS Tableau Accelerator from Tableau Exchange.
2. Open Tableau Desktop.
3. From the Tableau Desktop home page, click **Open a Workbook**.
4. In the Data menu, select each data source that you want to use, and then select **Edit Data Source**.
5. Log in and select **Allow** to give access to your data.

Explore the Dashboards

The IPEDS Tableau Accelerator includes eight dashboards.

Note

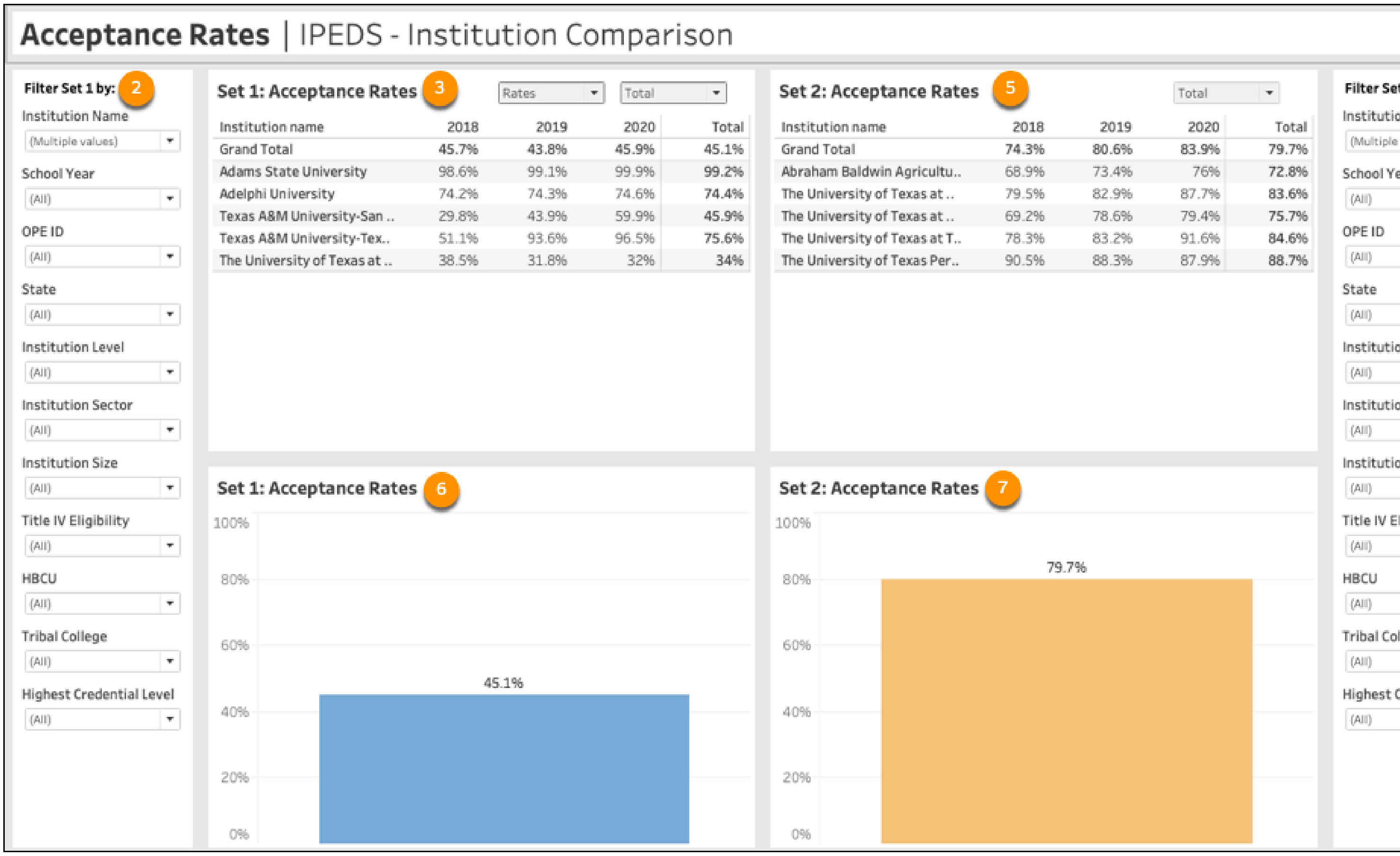
Application Status values are grouped in these buckets.

- Complete: Accepted Offer, Admit, Admit with Conditions, Declined Offer, Deferred Offer, Deny
- In Progress: In Review, Incomplete, Received, Submitted, Waitlist

To change these buckets, edit the Application Status (group) in the workbook.

Acceptance Rate | IPEDS – Institution Comparison

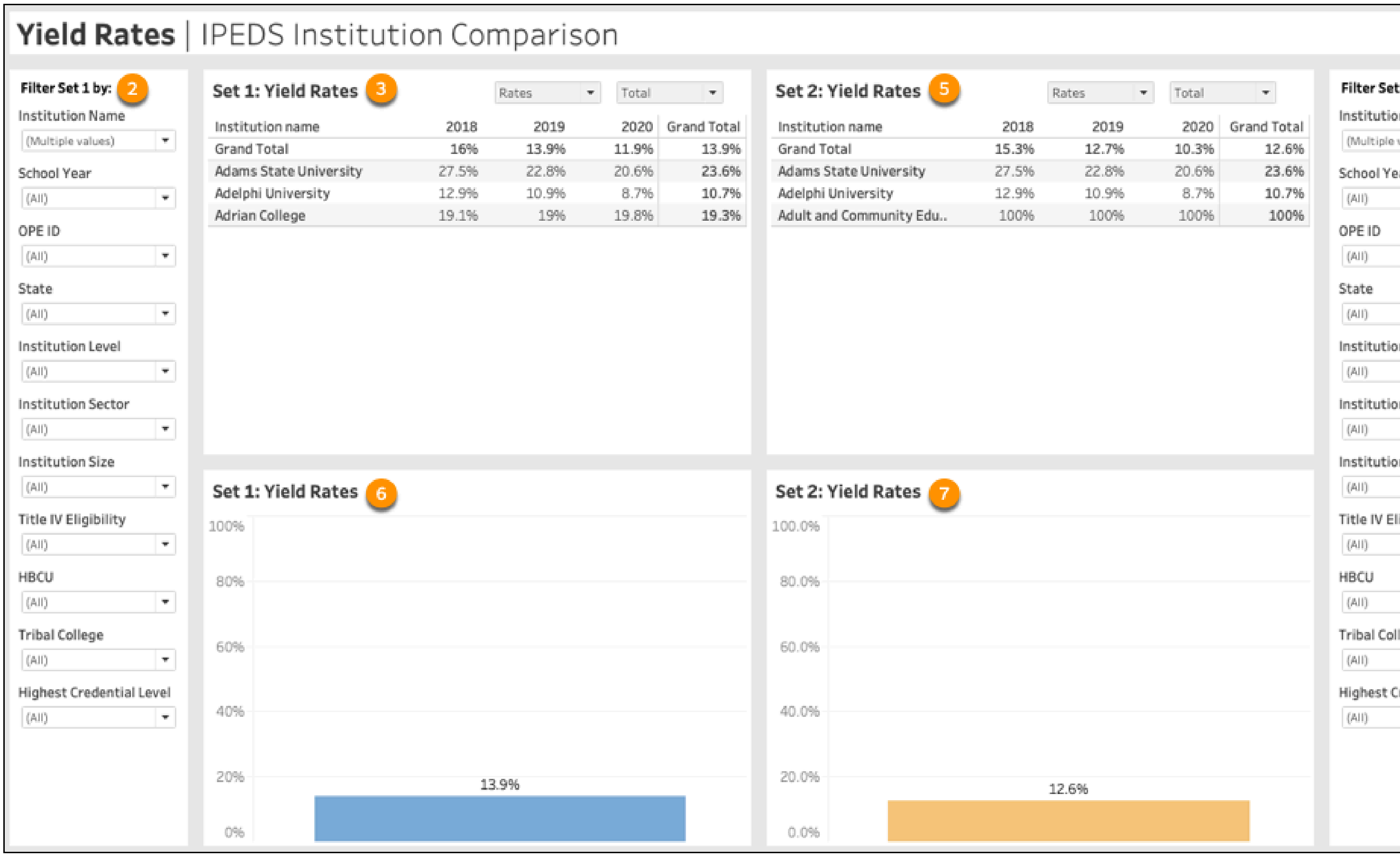
Compare two sets of institution acceptance rates. To view this dashboard, select the **IPEDS Acceptance Rate** tab.



- Hover over the icon to learn more about this dashboard and how you can use the reporting data (1).
- Filter the Set 1 data by Institution Name, School Year, OPE ID, State, Institution Level, Institution Sector, Institution Size, Title IV Eligibility, HBCU, Tribal College, and Highest Credential Level (2).
- Use the **Rates** and **Total** dropdown lists to filter the Set 1 Acceptance Rates report by rates, counts, and totals by gender. Hover over values for more information (3).
- Filter the Set 2 data by Institution Name, School Year, OPE ID, State, Institution Level, Institution Sector, Institution Size, Title IV Eligibility, HBCU, Tribal College, and Highest Credential Level (4).
- Use the **Total** dropdown list to filter the Set 2 Acceptance Rates report by gender. Hover over values for more information (5).
- View the Set 1 Acceptance Rates graphically (6).
- View the Set 2 Acceptance Rates graphically (7).

Yield rates | IPEDS – Institution Comparison

Compare two sets of institution yield rates. To view this dashboard, select the **IPEDS Yield Rate** tab.

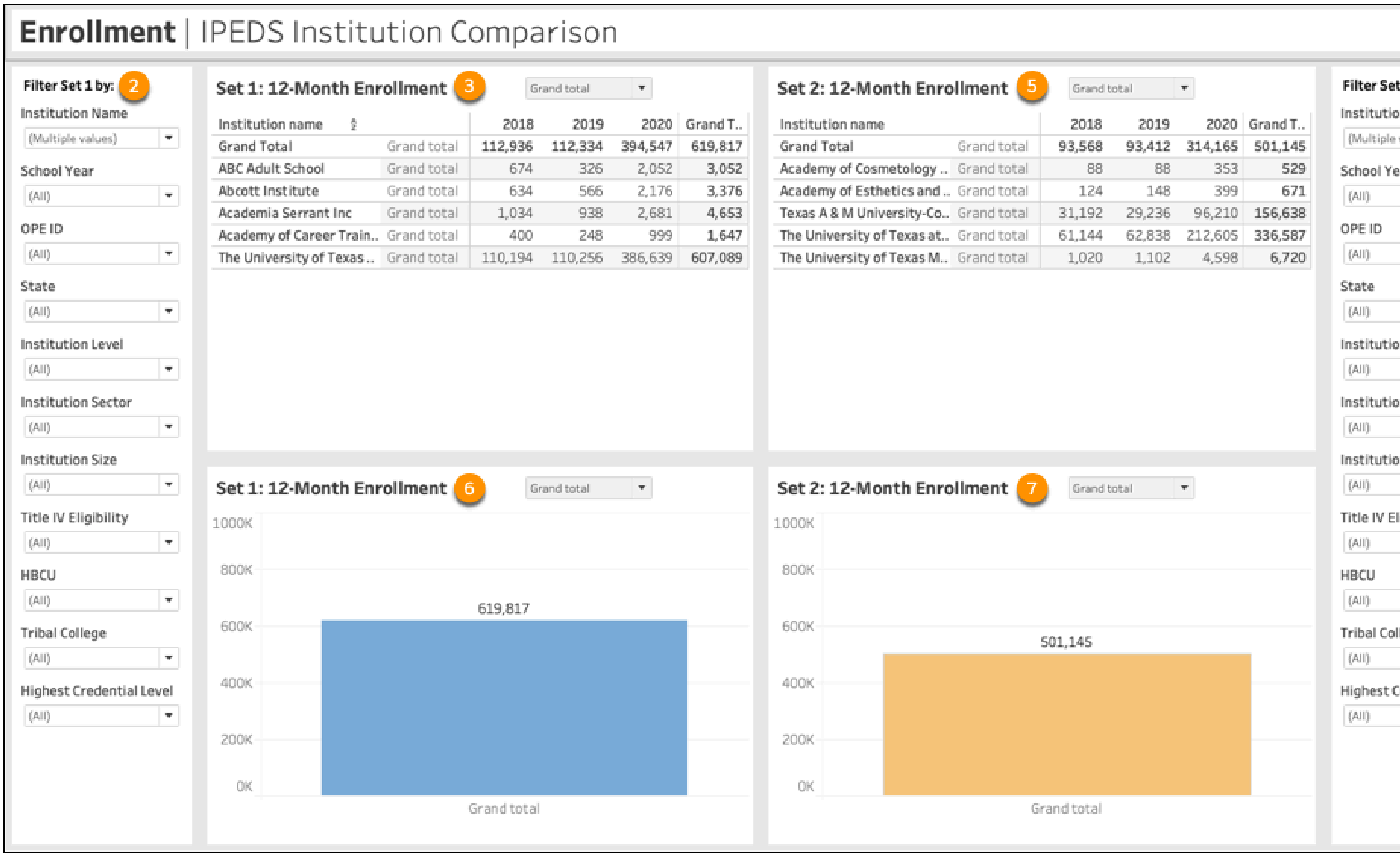


- Hover over the icon to learn more about this dashboard and how you can use the reporting data (1).
- Filter the Set 1 data by Institution Name, School Year, OPE ID, State, Institution Level, Institution Sector, Institution Size, Title IV Eligibility, HBCU, Tribal College, and Highest Credential Level (2).
- Use the **Rates** and **Total** dropdown lists to filter for admissions or enrolment rates and totals by gender. Hover over values for more information (3).
- Filter the Set 2 data by Institution Name, School Year, OPE ID, State, Institutional Level, Institution Sector, Institution Size, Title IV Eligibility, HBCU, Tribal College, and Highest Credential Level (4).
- Use the **Rates** and **Total** dropdown lists to filter for admissions or enrolment rates and totals by gender. Hover over values for more information (5).
- View the Set 1 Yield Rates graphically (6).

- View the Set 2 Yield Rates graphically (7).

Enrolment | IPEDS – Institution Comparison

Compare two sets of institution 12-Month enrolments. To view this dashboard, select the **IPEDS Enrolment** tab.

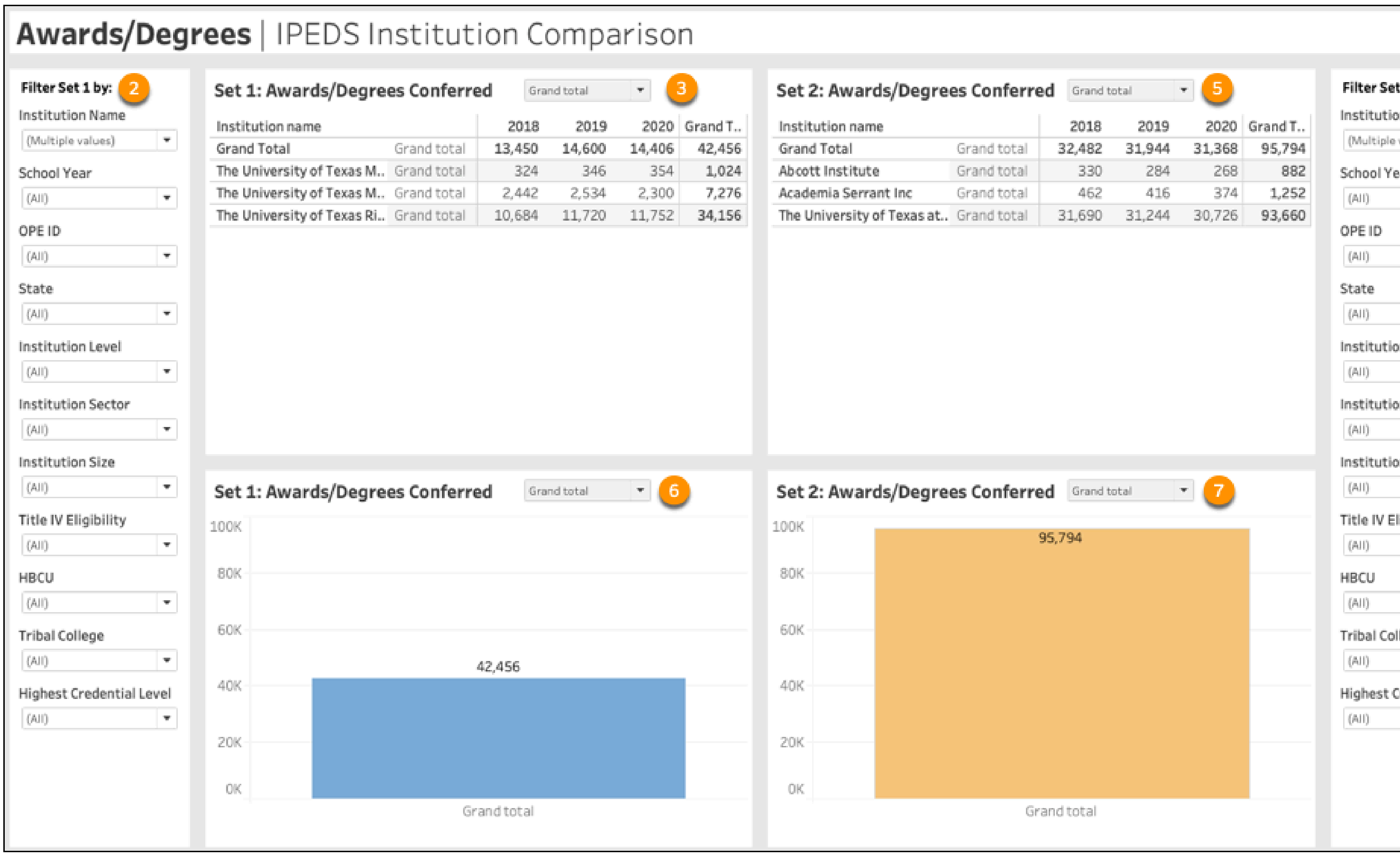


- Hover over the icon to learn more about this dashboard and how you can use the reporting data (1).
- Filter the Set 1 data by Institution Name, School Year, OPE ID, State, Institution Level, Institution Sector, Institution Size, Title IV Eligibility, HBCU, Tribal College, and Highest Credential Level (2).
- Use the **Grand total** dropdown list to filter the Set 1: 12-Month Enrolment report by genders, races, and ethnicities. Hover over values for more information (3).
- Filter the Set 2 data by Institution Name, School Year, OPE ID, State, Institution Level, Institution Sector, Institution Size, Title IV Eligibility, HBCU, Tribal College, and Highest Credential Level (4).
- Use the **Grand total** dropdown list to filter the Set 2: 12-Month Enrolment report by genders, races and ethnicities. Hover over values for more information (5).

- View the Set 1: 12-Month Enrolment report graphically and use the **Grand total** menu to filter the report by genders, races, and ethnicities. (6).
- View the Set 2: 12-Month Enrolment report graphically and use the **Grand total** menu to filter the report by genders, race, and ethnicities (7).

Awards/Degrees | IPEDS – Institution Comparison

Compare two sets of institution completions. To view this dashboard, select the **IPEDS Completers** tab.

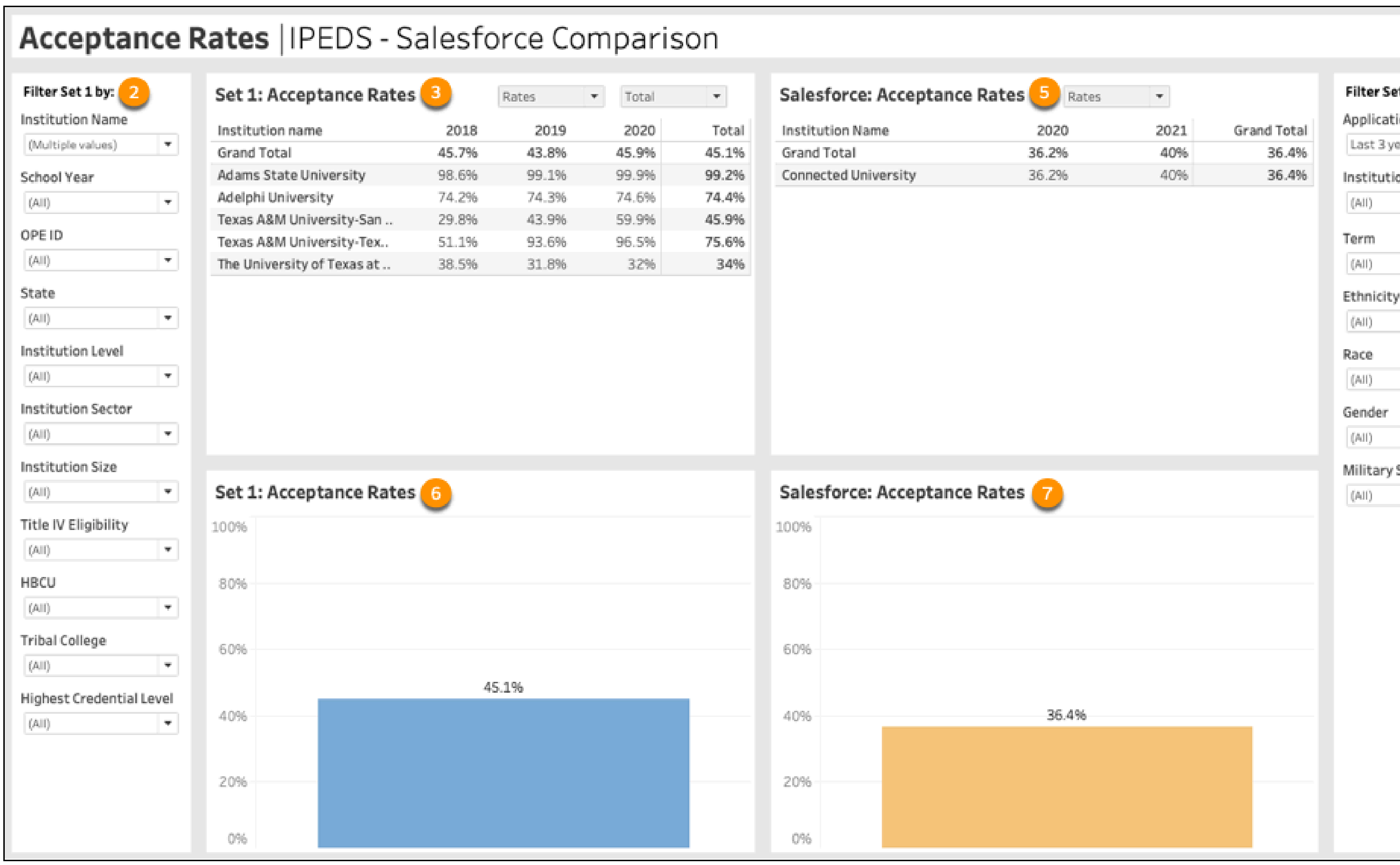


- Hover over the icon to learn more about this dashboard and how you can use the reporting data (1).
- Filter the Set 1 data by Institution Name, School Year, OPE ID, State, Institution Level, Institution Sector, Institution Size, Title IV Eligibility, HBCU, Tribal College, and Highest Credential Level (2).
- Use the **Grand total** dropdown list to filter the Set 1: Awards/Degrees Conferred report by genders, races and ethnicities. Hover over values for more information (3).

- Filter the Set 2 data by Institution Name, School Year, OPE ID, State, Institution Level, Institution Sector, Institution Size, Title IV Eligibility, HBCU, Tribal College, and Highest Credential Level (4).
- Use the **Grand total** dropdown list to filter the Set 2: Awards/Degrees Conferred report by genders, races and ethnicities. Hover over values for more information (5).
- View the Set 1: 12-Month Enrolment report graphically and use the Grand total menu to filter the report by genders, races, and ethnicities (6).
- View the Set 2: 12-Month Enrolment report graphically, and use the Grand total menu to filter the report by genders, races, and ethnicities (7).

Acceptance Rates | IPEDS – Salesforce Comparison

Compare institution completions from IPEDS with yours in Salesforce. To view this dashboard, select the **IPEDS + SF Acceptance Rate** tab.

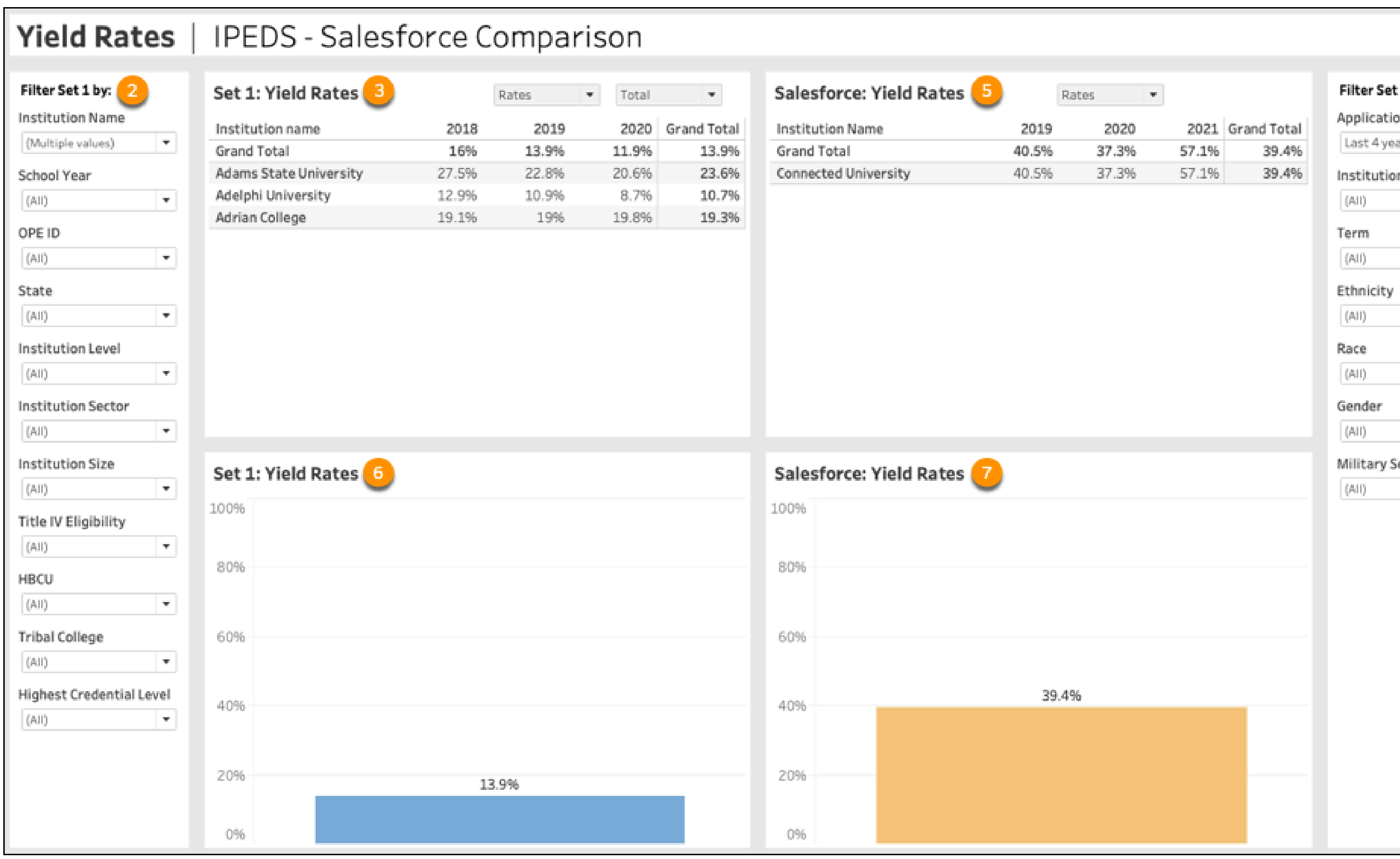


- Hover over the icon to learn more about this dashboard and how you can use the reporting data (1).

- Filter the Set 1 data by Institution Name, School Year, OPE ID, State, Institution Level, Institution Sector, Institution Size, Title IV Eligibility, HBCU, Tribal College, and Highest Credential Level (2).
- Use the **Rates** and **Total** dropdown lists to filter the Set 1: Acceptance Rates report by Admissions, Applicants, and gender. Hover over values for more information (3).
- Filter the Set 2 Salesforce data by Application Date, Institution Name, Term, Ethnicity, Race, Gender, and Military Service (4).
- Use the **Rates** dropdown list to filter the Salesforce: Acceptance Rates report by Admissions or Applicants. Hover over values for more information (5).
- View the Set 1: Acceptance Rates graphically (6).
- View the Set 2 Salesforce: Acceptance Rates graphically (7).

Yield Rates | IPEDS – Salesforce Comparison

Compare institution yield rates from IPEDS with your rates in Salesforce. To view this dashboard, select the **IPEDS + SF Yield Rate** tab.

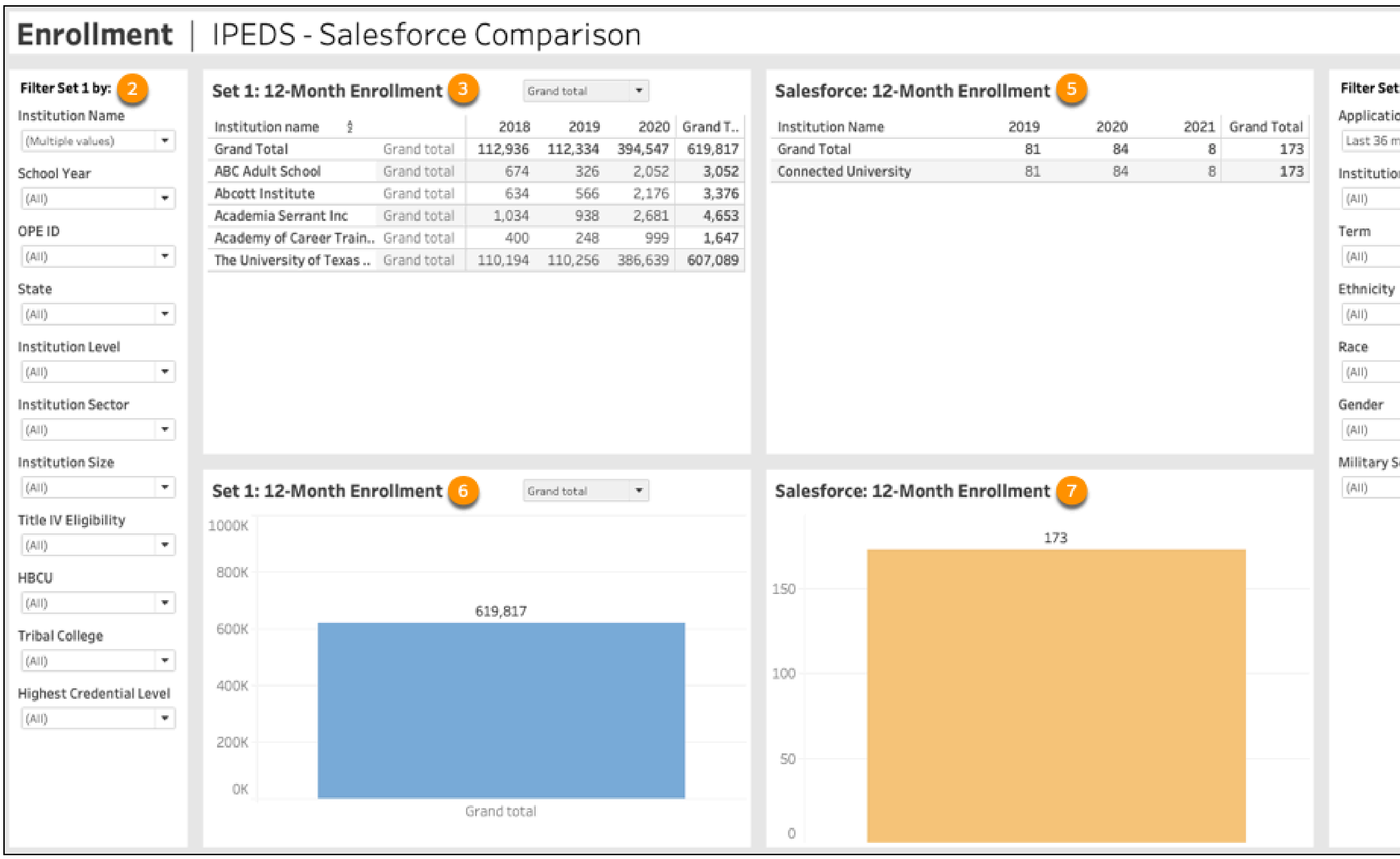


- Hover over the icon to learn more about this dashboard and how you can use the reporting data (1).

- Filter the Set 1 data by Institution Name, School Year, OPE ID, State, Institution Level, Institution Sector, Institution Size, Title IV Eligibility, HBCU, Tribal College, and Highest Credential Level (2).
- Use the **Rates** and **Total** dropdown lists to filter the Set 1: Yield Rate report by Enrolled or Admissions rates, and gender. Hover over values for more information (3).
- Filter the Set 2 Salesforce data by Application Date, Institution Name, Term, Ethnicity, Race, Gender, and Military Service (4).
- Use the **Rates** dropdown list to filter the Salesforce: Yield Rates report by Enrolled and Admission rates. Hover over values for more information (5).
- View the Set 1: Yield Rates report graphically (6).
- View the Set 2 Salesforce: Yield Rates report graphically (7).

Enrolment | IPEDS – Salesforce Comparison

Compare institution 12-Month enrolments from IPEDS with your enrolment data in Salesforce. To view this dashboard, select the **IPEDS + SF Enrolment** tab.

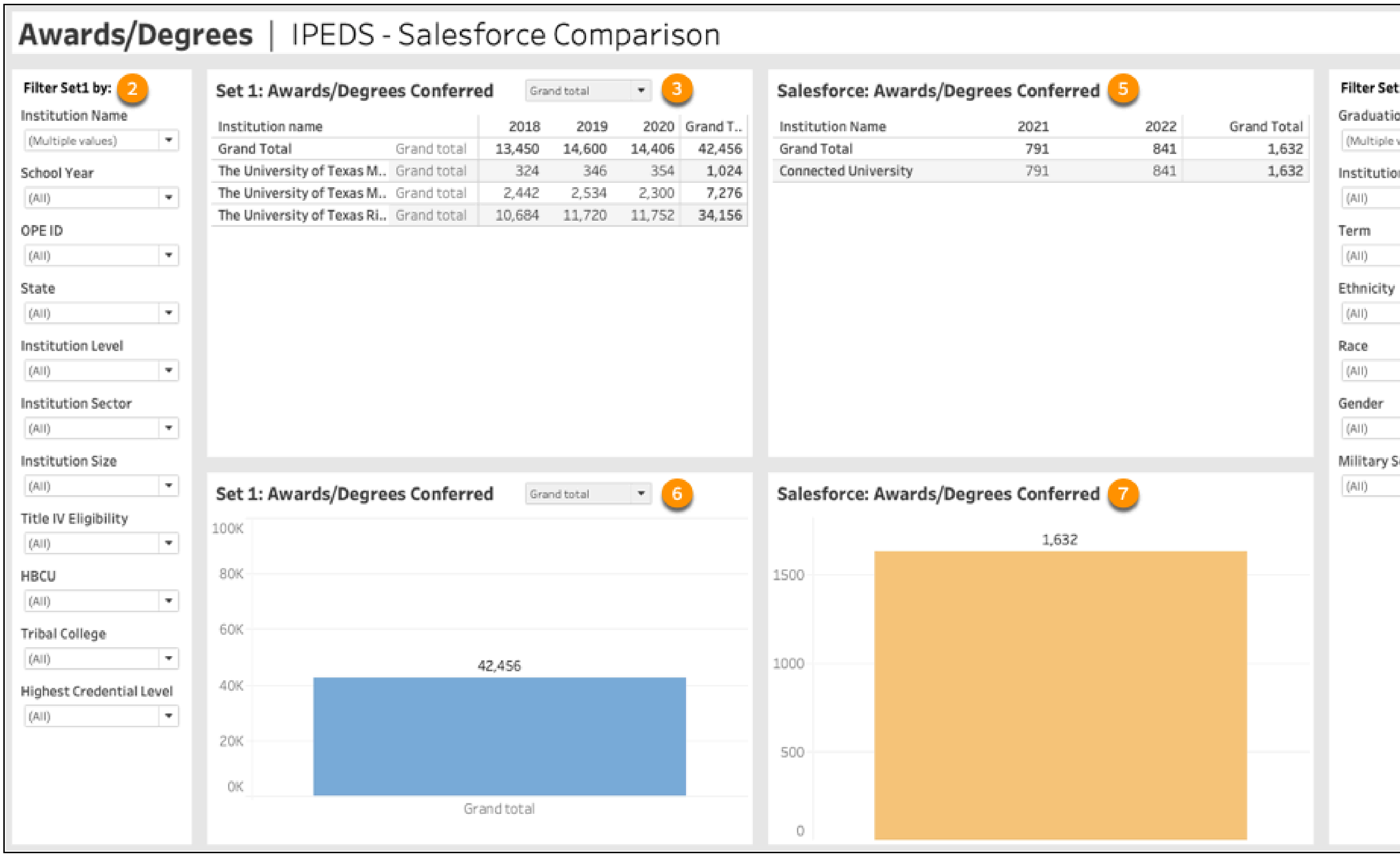


- Hover over the icon to learn more about this dashboard and how you can use the reporting data (1).

- Filter the Set 1 data by Institution Name, School Year, OPE ID, State, Institution Level, Institution Sector, Institution Size, Title IV Eligibility, HBCU, Tribal College, and Highest Credential Level (2).
- Use the **Grand total** dropdown list to filter the Set 1: 12-Month Enrolment report by race, ethnicity, and gender. Hover over values for more information (3).
- Filter the Set 2 Salesforce data by Application Date, Institution Name, Term, Ethnicity, Race, Gender, and Military Service (4).
- View the Salesforce: 12-Month Enrolment report. Hover over values for more information (5).
- View the Set 1: 12-Month Enrolment report graphically, and use the **Grand total** dropdown list to filter the report by gender, race, and ethnicity (6).
- View the Set 2 Salesforce: 12-Month Enrolment report graphically (7).

Completers | IPEDS – Salesforce Comparison

Compare institution completions from IPEDS with yours in Salesforce. To view this dashboard, select the **IPEDS + SF Completers** tab.



- Hover over the icon to learn more about this dashboard and how you can use the reporting data (1).
- Filter the Set 1 data by Institution Name, School Year, OPE ID, State, Institution Level, Institution Sector, Institution Size, Title IV Eligibility, HBCU, Tribal College, and Highest Credential Level (2).
- Use the **Grand Total** dropdown list to filter the Set 1: Awards/Degrees Conferred report by race, ethnicity, and gender. Hover over values for more information (3).
- Filter the Set 2 Salesforce data by Graduation Year, Institution Name, Term, Ethnicity, Race, Gender, and Military Service (4).
- View the Salesforce: Awards/Degrees Conferred report. Hover over values for more information (5).
- View the Set 1: Awards/Degrees Conferred report graphically. Use the **Grand total** dropdown list to filter the report by race, ethnicity, and gender (6).
- View the Set 2 Salesforce: Awards/Degrees Conferred report graphically (7).

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Get the most out of your data analyses by adhering to proven strategies.

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- Export Tableau data to various image file types for use in presentations or other communications.
- If you need help, log a support case with Tableau.

Configure EDA Data Automation with TDTM

Use Table-Driven Trigger Management to manage your code and automate complex processes.

Apex Class Descriptions for EDA

Verify access to EDA Apex classes for all profiles and permission sets that need them.

These Apex classes are managed by Table-Driven Trigger Management (TDTM). Use these descriptions to help inform your decisions when using TDTM, for example, when disabling Trigger Handlers.

For a complete list of the trigger handlers that EDA uses, click App Launcher icon (⠿) and search for and select **Trigger Handlers**. To stay informed about updates for Trigger Handlers, join the Education Release Readiness group.

Important
If you have technical questions about how a class works, refer to the EDA GitHub code repository.

Object	Class Name	Description
Account	ACCT_CannotDelete_TDTM	This class prevents an Account from being deleted if it has any related Address, Affiliation, Attribute, Course, Course Connection, Education History, Facility, Programme Enrolment, Programme Plan, Term, or Time Block records.
Account	ADDR_Account_TDTM	When you update the values on Billing Address fields (Billing Street, Billing City, and so on), this class creates or updates a related Address record for Accounts that are configured for Address management in EDA Settings. If the Account is a Household Account, the class updates the Postal Address fields for any Contacts associated with the Household.

Account	AFFL_AccRecordType_TDTM	When you change the record type of an Account, and it's a Primary Affiliation for a Contact, this class updates the Primary Affiliation to match the new record type. For example, if you change the Account's record type from Academic Program to Sports Organisation, this class updates the Contact's Primary Sports Organisation field. This class does not create a new Affiliation record when the related Account type is changed. It updates the existing Primary Affiliation record to reflect the new Account Type.
Account	RenameLeadConvertedAccounts_TDTM	When an Account is created during Lead conversion with a record type specified in Automatically Rename Lead-Converted Accounts in EDA Settings, this class enforces the use of the Account naming format associated with the record type in EDA.
Address__c	ADDR_Addresses_TDTM	When you create, update, or delete an Address record, this class sets the Latest Start Date, Latest End Date, Default, and Parent Account/Contact fields. If the Address is designated as Primary field, this class updates the related Billing Address/Mailing Address fields.
Address__c	ADDR_CannotDelete_TDTM	This class prevents an Address record from being deleted if it has any related Account (Administrative or Household) or Contact records.
Affiliation__c	AFFL_AccChange_TDTM	When you change or clear the Account field on an Affiliation record designated as Primary, this class updates or clears the appropriate Primary Affiliation lookup on the related Contact record.

Affiliation__c	AFFL_CannotDelete_TDTM	This class prevents an Affiliation record from being deleted if it has any related Course Connection records.
Affiliation__c	AFFL_ContactChange_TDTM	When you change the Contact field on an Affiliation record designated as Primary, this class clears the corresponding Primary Affiliation field on the related Contact and populates the appropriate Primary Affiliation on the updated Contact. If you clear the Contact field on an Affiliation record, this class clears the corresponding Primary Affiliation field on the related Contact.
Affiliation__c	AFFL_MultiRecordType_TDTM	This class ensures that a given Contact has only one Primary Affiliation per record type. If you deselect Primary on an Affiliation record, this class clears the corresponding Primary Affiliation field on the related Contact record. If you select Primary checkbox on a non-Primary Affiliation, this class populates the appropriate Primary Affiliation on the related Contact record, and any other Primary Affiliations of the same type become non-Primary. If the Affiliation type is configured for Programme Enrolments in EDA Settings, this class creates the Programme Enrolment record for the Contact and Account related to the Affiliation.
Application__c	Application_TDTM	This class verifies that the Application Due Date follows the Application Open Date. If the Application Due Date is on or before the Application Open Date, the class returns an error and doesn't save the Application.
Attendance_Event__c	ATTD_CourseConnectionContact_TDTM	This class validates that the same Contact is specified for a Course Connection and a related Attendance Event.

Behaviour_Involvement__c	BEH_CannotDelete_TDTM	This class prevents a Behaviour Involvement record from being deleted if it has any related Behaviour Response records.
CampaignMember	REL_Relationships_Cm_TDTM	When you create or update a Campaign Member record with data in a custom Contact lookup field, and Relationships Autocreation is configured in EDA Settings, this class creates or updates a Relationship record between the two Contacts.
Case__c	CASE_CannotDelete_TDTM	This class prevents a Case record from being deleted if it has any related Behaviour Involvement records.
Contact	ACCT_IndividualAccounts_TDTM	This class ensures that when the owner of a Primary Contact record that has an Administrative or Household Account is updated, the owner of the Account is also updated. It also ensures that when a Primary Contact is moved from an Administrative or Household Account, the first remaining Contact on the Account becomes the Account's Primary Contact. When the name of a Contact used to name an Account changes, the Account's name is updated using the Account Naming Format specified on the Systems tab in EDA Settings. These behaviours apply to all Accounts with the Administrative or Household Account Record Type specified on the Accounts and Contacts tab in EDA Settings.

Contact	ADDR_Contact_TDTM	This class implements Address management on the Contact object. When you create or update a Contact with Mailing Address information, this class creates a related Address record. If the Contact is in a Household, this class creates Address records for all Contacts in the same Household (except Contacts who have Do Not Automatically Update selected).
Contact	CON_CannotDelete_TDTM	This class prevents a Contact from being deleted if it has any related Address, Affiliation, Application, Attendance Event, Attribute, Behaviour Involvement, Contact Language, Course Connection, Course Offering (Faculty), Education History, Programme Enrolment, Term Grade, or Test records.
Contact **(K-12 Architecture Kit only)**	CON_CurrentGradeLevel_TDTM	When you populate the Current Grade Level field on a new Contact record, this class creates a related Grade Enrolment record for the Contact and sets its status to Current. When you update a Contact record that already has a value in the Current Grade Level field, this class creates a new Grade Enrolment record for the Contact and sets its status to Current. In this case, the previous Grade Enrolment's status is set to Former.
Contact	CON_DoNotContact_TDTM	When you update the Do Not Contact or Deceased settings on a Contact, this class synchronises the Exclude From Household naming fields (Exclude From Household Name, Exclude From Household Formal Greeting, and Exclude From Household Informal Greeting) and communication preferences (Do Not Contact, Do Not Call, Email Opt Out, and Fax Opt Out). For example, if you specify Deceased for a Contact, the Exclude From Household fields are also selected.

Contact	CON_Preferred_TDTM	This class populates a Contact's standard Email and Phone fields based on Preferred Email and Preferred Phone selections. As of release 1.82, this class syncs Preferred Phone selections only if the enhanced Preferred Phone sync functionality isn't enabled.
Contact	CON_PreferredPhone_TDTM	This class syncs the value in a Contact's standard Phone field with the value in Preferred Phone. For example, if Preferred Phone is set to Mobile, with a value of 555-867-5309, this value is copied to the Contact's standard Phone field. This class returns an error if the selected Preferred Phone has an empty value. This class prompts users to specify which Phone is preferred when more than one value is entered, but Preferred Phone is not selected.
Contact	CON_PrimaryAffls_TDTM	When you create a Contact record that has a Primary Affiliation field or update any Primary Affiliation field on a Contact record, this class creates a related Affiliation record between the Contact and Account, and selects the Affiliation's Primary field. If an existing Primary Affiliation value is changed or cleared, this class deselects the Primary field on the previous Affiliation and creates a new Primary Affiliation.
Contact	REL_Relationships_Con_TDTM	When you create or update a Contact record with data in a custom Contact lookup field, and Relationships Autocreation is configured in EDA Settings, this class creates or updates a Relationship record between the two Contacts.
Contact_Language__c	CLAN_PrimaryLanguage_TDTM	This class keeps the Contact's Primary Language lookup field in sync with the Language related to the Contact's primary Contact Language record.

Contact_Language__c	CON_PrimaryLanguage_TDTM	This class ensures that the Contact Language record related to a Contact's Primary Language lookup field is marked as Primary, and that the Fluency value is automatically set on newly created Contact Language records when a user sets the Primary Language lookup field on a Contact.
Course__c	COUR_CannotDelete_TDTM	This class prevents a Course record from being deleted if it has any related Course Offering or Plan Requirement records.
Course_Connection__c	CCON_PreventUpdate_TDTM	When a Course Connection has a related Term Grade or Attendance Event, this class prevents changes to a Contact or Course Offering on that Course Connection.
Course_Enrolment__c	CENR_AcademicProgram_TDTM	When you populate or change the Programme Enrolment ID field on a Course Connection record, this class sets the Academic Programme field to the same Account related to the Programme Enrolment.
Course_Enrolment__c	CCON_Faculty_TDTM	This class implements several aspects of Course Connections functionality, including updates to the Primary Faculty field on the related Course Offering, and Affiliation records between the faculty Contact and Course's Department. This class is relevant only if you have enabled Course Connections in EDA Settings.
Course_Offering__c	COFF_Affiliation_TDTM	When you create or update a Course Offering and populate or change the Primary Faculty field, this class creates a Course Connection that relates the faculty Contact record to the Course Offering. This class also creates an Affiliation record between the faculty Contact and the Course's Department.

Course_Offering__c	COFF_CannotDelete_TDTM	This class prevents a Course Offering record from being deleted if it has any related Course Connection or Course Offering Schedule records.
Course_Offering_Schedule__c	COS_StartEndTime_TDTM	When you create or update a Course Offering Schedule that has a related Time Block, this class populates the Start Time and End Time fields for the Course Offering Schedule with the values from the Time Block.
Education_History__c **(K-12 Architecture Kit only)**	EDUHIS_DataInteg_TDTM	When you create or update an Education History record, this class evaluates whether the Educational Institution specified in the Grade Enrolment record matches the Educational Institution Account specified in the Education History record. This class returns an error if the values don't match. A blank Educational Institution field isn't considered a mismatch.
Grade_Enrolment__c **(K-12 Architecture Kit only)**	GRER_DataInteg_TDTM	When you create or update a Grade Enrolment object, this class evaluates whether the Educational Institution specified in the Grade Enrolment record matches the Educational Institution Account specified in the Education History record. This class returns an error if the values don't match. A blank Educational Institution field isn't considered a mismatch.

Grade_Enrolment__c **(K-12 Architecture Kit only)**	GRER_SyncGradeLevel_TDTM	This class matches the value on a Contact's Current Grade Level field to the Grade Level set on a Grade Enrolment record with a Current status. If any other Grade Enrolment record has a Current status when another Grade Enrolment record is set to Current, this class sets the status for that record to Former. This class also updates the Current Grade Level field on a Contact to Not Applicable when no Grade Enrolment records have a Current status.
Facility__c	FACI_CannotDelete_TDTM	This class prevents a Facility record from being deleted if it has any related Facility or Course Offering records. Facility records also cannot be deleted when they have related Course Offering Schedules due to the configuration of the Facility object's lookup field.
Plan_Requirement__c	PReq_CannotDelete_TDTM	This class prevents a Plan Requirement record from being deleted if there are any related Plan Requirement records.
Program_Enrolment__c	PREN_Affiliation_TDTM	This class creates an Affiliation record between the Contact and the Academic Program (Account) when you create a Program Enrolment record. When you delete a Program Enrolment record, the class either updates the related Affiliation's status or deletes the Affiliation, depending on the configuration in Affiliation settings in EDA Settings.
Program_Enrolment__c	PREN_CannotDelete_TDTM	This class prevents a Programme Enrolment record from being deleted if it has any related Course Connection records.

Program_Enrolment__c	PREN_ProgramPlan_TDTM	When you create a Program Enrolment record, this class populates the Program Plan field with the Program Plan that's specified as Primary for the Academic Program. If a primary Program Plan isn't specified, then the Program Plan field isn't populated.
Program_Plan__c	PPlan_CannotDelete_TDTM	This class prevents a Programme Plan from being deleted if is has any related Plan Requirement or Programme Enrolment records.
Program_Plan__c	PPlan_Primary_TDTM	This class ensures there is only one primary Program Plan per Account. When you insert or update a Program Plan and set Is Primary to True, the class updates Is Primary to False for all other Program Plan records related to the same Account.
Relationship__c	REL_Relationships_TDTM	This class implements Reciprocal Relationship functionality. When you create a Relationship record for one Contact, this class creates a reciprocal record for the Related Contact. When you update fields like Status or Type, this class makes an equivalent update to the reciprocal Relationship based on Relationships configuration in EDA Settings.
Term__c	Term_CannotDelete_TDTM	This class prevents a Term record from being deleted if it has any related Course Offering, Term, or Term Grade records.
Term__c	TERM_CourseOff_TDTM	When you populate the Start Date or End Date on a Term record, this class copies the dates to all related Course Offering records.
Term_Grade__c	TGRD_ValidateData_TDTM	This class ensures that the selected Course Connection matches the selected Contact and Course Offering. It attempts to populate the missing data based on the data provided.

Test__c	TST_CannotDelete_TDTM	This class prevents a Test record from being deleted if it has any related Test Score records.
Time_Block__c	TB_CannotDelete_TDTM	This class prevents a Time Block record from being deleted if it has any related Course Offering or Course Offering Schedule records.
Time_Block__c	TB_StartEndTime_TDTM	When you update the Start Time and End Time for a Time Block, this class locates related Course Offering Schedules and updates their Start Time and End Time to match the new Time Block values.
Trigger_Handler__c	THAN_Filter_TDTM	This class performs validation on Trigger Handler records. It prevents two Trigger Handlers from referencing the same TDTM class. The class also enforces that Trigger Handler records with Filter Field data must also have Filter Value data.
Trigger_Handler__c	THAN_ClearCache_TDTM	This class clears cached TDTM Tokens after you create or update a Trigger Handler record.

Table-Driven Trigger Management (TDTM) Overview

Understand how EDA uses TDTM to manage your code in Salesforce and control how Apex behaves.

Introduction

Table-Driven Trigger Management (TDTM) is a tool to manage your code in Salesforce and control how Apex behaves. Apex is the programming language used to build complex automation in Salesforce, and TDTM is a framework for managing that code.

We're here to demystify TDTM–what it is and why it's such a powerful tool for non-profits and educational institutions using applications like Nonprofit Success Pack (NPSP) and Education Data Architecture (EDA) from Salesforce.org.

What *Is* TDTM?

Table-driven trigger management (TDTM) is a tool for automation–and automation is one of the big benefits of using Salesforce.

For example, when a Contact record in Salesforce is added, updated, or deleted, we often want other things to happen automatically–update an address or a value on an Account.

You may be familiar with using Process Builder or workflows in Salesforce to automate business processes. Some of the more complex processes are built with another automation tool called Apex triggers. Apex triggers are simply another way of handling automation, using code rather than a feature like workflow.

EDA relies heavily on triggers. For example, a trigger on the Contact object can automatically update address data when the Contact is updated. Other triggers are used to roll up or summarise data from related records to a parent record. Triggers come standard with EDA, and TDTM is the framework for managing them.

In practice, TDTM has several uses. TDTM lets you:

- Disable specific pieces of code
- Build your own custom code that works in conjunction with EDA
- Control the order in which the code executes

An important part of using TDTM is understanding the Trigger Handler custom object. Fields on the object manage the behaviour of the triggers built within the TDTM framework. With just a few clicks, you can change the way your code behaves.

For more information, read Manage Trigger Handlers.

> **Note**
> Be aware that Trigger Handler records **are not** copied to Developer, Developer Pro, or Partial sandboxes when you create one.

Disable Specific Pieces of Code

Disable code related to your automated processes to control whether and when certain pieces of code operate.

You might need to disable code when you:

- Import large sets of data (many thousands of records at once)
- Integrate with external systems
- Troubleshoot code errors

For more about disabling code with TDTM, see Disable Trigger Handlers.

Create Your Own Custom Code

If you're developing your own custom Apex code or integrating an external system with Salesforce, you should familiarise yourself with the TDTM architecture. Salesforce and many expert developers recommend that you have only on one trigger for each object (one for Contacts, one for Accounts, and so on).

It's easy to mistakenly create new triggers and end up with many triggers for the same object, which is absolutely not a Salesforce best practice. When you learn how to extend TDTM functionality into your code, you don't need to create new triggers–you just use the trigger that already exists in TDTM to pass environment data to your custom Apex classes. By using the existing TDTM infrastructure instead of creating your own, you get the most reliable and efficient behaviour as a result.

For a technical deep dive into TDTM design, see Deploy a Custom Apex Class in the TDTM Framework.

Control the Order in Which Your Code Executes

If your organisation has been using Salesforce for a while, it's likely that you'll identify where more automation could save time. While tools like Process Builder and workflow can do some of these things, custom Apex code is sometimes more appropriate. As you develop custom code, it becomes really important to manage the order in which your code fires, which is why TDTM is so helpful.

TDTM ensures that things happen in the order you expect them to happen. For example, you wouldn't put on your shoes without putting your socks on first, right? TDTM lets you tell Salesforce to ALWAYS put the socks on first, then the shoes, and so on. Otherwise, things happen in an indeterminate order, which is really just a fancy way of saying that potentially you could end up wearing your socks over your shoes (or have one piece of code firing before another, and not in the order you want). Apex triggers do not come with a way to control the order of operation but TDTM fills that gap.

Summing Up

TDTM allows organisations to grow and more easily add complexity to their databases while still maintaining control over the scope and sequence of process automation.

If the examples we've covered don't sound like the sorts of things your organisation is doing now, or you only partially followed what we're talking about, then chances are it's OK for you to leave the default TDTM behaviour as is. However, organisations do change over time and you may find that you need to engage with TDTM down the road. Just put a pin in it for now and remember its intended use for the future.

Manage Trigger Handlers for EDA

Follow these steps to view, edit, and create new trigger handlers in EDA.

Manage Trigger Handlers

Trigger Handler records are a fundamental part of Table-Driven Trigger Management (TDTM). The Trigger Handler object is a Salesforce object like any other (Accounts, Contacts, etc.). Fields on the object manage the behaviour of the triggers built within the TDTM framework. With just a few clicks, you can change the way your code behaves.

For example, the Active field specifies if a piece of code, an Apex class, runs when it's called by the trigger. Load Order controls the sequence in which Apex classes for the same object run. Usernames to Exclude deactivates an Apex class, but only for the users you specify. These and other settings are controlled through fields on Trigger Handler records.

Your Education Data Architecture (EDA) package includes a Trigger Handler record for each of the package's Apex classes; you don't have to create them when you install EDA. For any custom Apex class that you plan to include in the TDTM framework, create a Trigger Handler record that references it so that you can accurately control the behaviour of your code. We won't go into the details of how to create Apex classes for TDTM here—just remember that when you do, Trigger Handlers are part of the deployment process.

For more information, see Table-Driven Trigger Management (TDTM).

Prerequisites for Managing Trigger Handlers

Before you can manage Trigger Handlers, make sure they are set up correctly in your org and are ready to use.

- Enable Administrator Access to Trigger Handler Fields
- Verify Fields on Trigger Handler Layout

Enable Administrator Access to Trigger Handler Fields

Confirm that the System Administrator profile has Read and Edit access to all Trigger Handler fields. (If you're not sure how to adjust access to fields, read Set Field Permissions in Permission Sets and Profiles in the Salesforce Help.)

- Active
- Asynchronous
- Class
- Filter Field
- Filter Value
- Load Order
- Object
- Owned by Namespace
- Trigger Action
- Trigger Handler Name

- User Managed
- Usernames to Exclude

Verify Fields on Trigger Handler Layout

Confirm that all the Trigger Handler fields are present on the Trigger Handler Layout. (If you're not sure how to adjust page layouts, read Page Layouts in the Salesforce Help.)

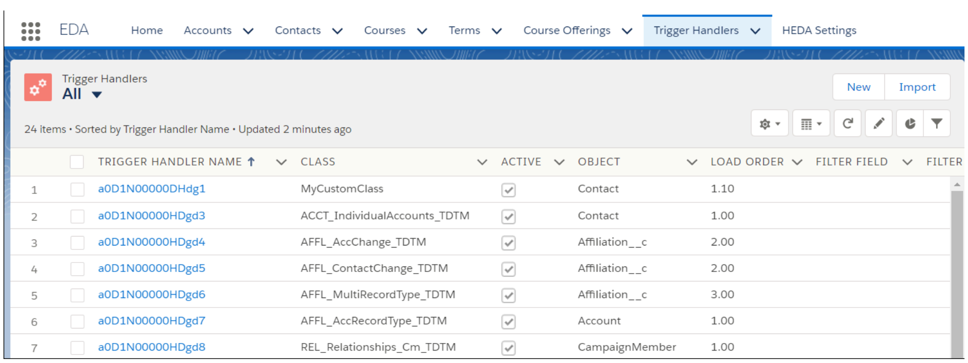
View Trigger Handlers

Trigger Handlers are records just like any other, so you can create list views to filter and sort the records. Access the Trigger Handler records via the Trigger Handlers tab.

1. Click the **Trigger Handlers** tab.

> **Note**
> Sometimes the Trigger Handler tab isn't visible by default. If you don't see it, click the More tab. If you still don't see it, from the App Launcher, find and select Trigger Handlers. (Items are listed alphabetically.) **Only System Administrators** should have access to the Trigger Handler tab. As a best practice, remove access for all other Profiles.

2. Select the **All** list view to see the full list of Trigger Handler records.



Edit a Trigger Handler

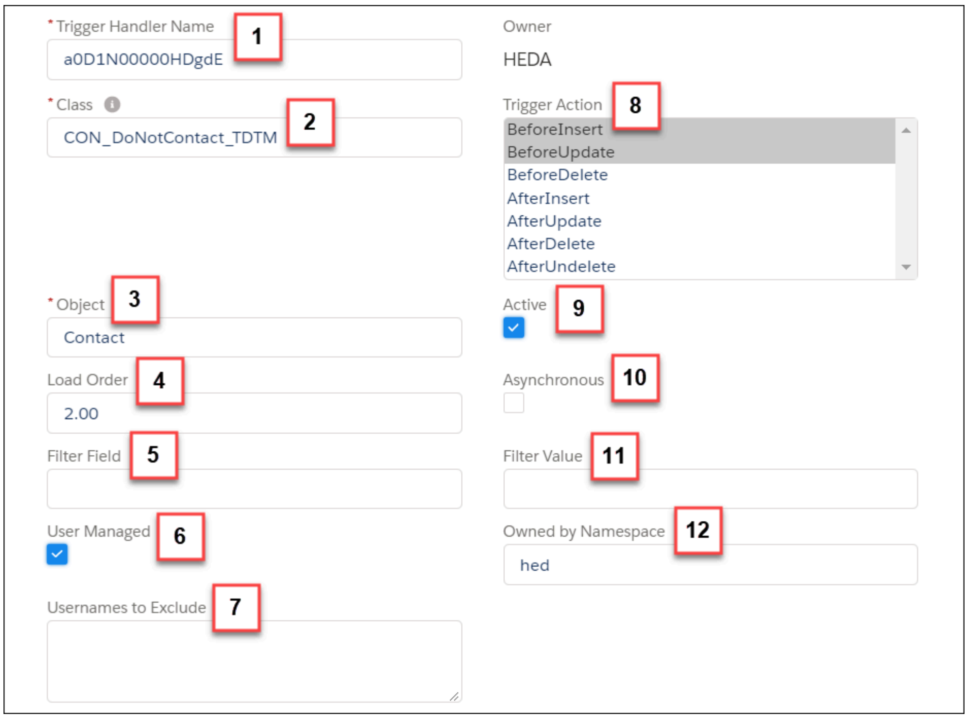
An administrator can edit Trigger Handler records to deactivate them, change their load order, change which users will execute the Apex class, and so on. A common reason to edit a Trigger Handler is to disable it.

For more information, read Disable Table-Driven Trigger Management.

1. Click the **Trigger Handler** Tab.
2. Click the name of the Trigger Handler you want to edit.

3. Click **Edit**.

You can edit these Trigger Handler details:



Trigger Handler Name (1)–Trigger Handlers provided with EDA use a record ID for the record name. If you create new Trigger Handler records, you can follow your own naming convention.

Class (2)–Name of the Apex class this Trigger Handler manages. If the class exists within a managed package you created, include the namespace prefix.

Object (3)–Name of the object, that when modified, runs the Apex class. For EDA custom objects, omit the namespace prefix (that is, use Address__c, not hed__Address__c).

Load Order (4)–Order in which Apex classes for the same object will run. Uses sequential numbers with two decimal places starting with 0.00.

Filter Field (5)–API Name of the field used to filter by. The Filter Field and Filter Value together specify when an Apex class should NOT run. Most field types are supported, including fields on related records (for example, Account.BillingStreet). If you reference an EDA packaged field, omit the namespace prefix (that is, use Citizenship__c, not hed__Citizenship__c).

User Managed (6)–Indicates that your org has customised this Trigger Handler and prevents it from reverting to default settings during a package upgrade. Enable User Managed on any packaged Trigger Handlers that you have modified to preserve your changes.

Usernames to Exclude (7)–A list of semicolon-separated Salesforce usernames that this Apex class should NOT run for. Leave this field blank to allow the class to run for all users.

Trigger Action (8)–Trigger actions that this Apex class runs on. Before Insert, After Update, and so on.

Active (9)–Indicates whether the Trigger Handler is active or not.

Asynchronous (10)–Allows this Apex class to run asynchronously. Requires that your Apex class supports asynchronous processing. EDA classes are not designed to run asynchronously. Test thoroughly if you enable this option.

Filter Value (11)–The value that Filter Field uses to filter by. The Filter Field and Filter Value together specify when an Apex class should NOT run. Text values must be an exact match but are not case sensitive.

Owned by Namespace (12)–The namespace identifies the package or class that the Trigger Handler belongs to, allowing you to group like Trigger Handlers together. EDA Trigger Handlers all have the hed namespace. We recommend specifying an Owned by Namespace value for all Trigger Handlers you create so you can easily distinguish them from others' Trigger Handlers.

4. Remember to **Save** your changes.

Important

Be careful when changing EDA Trigger Handler records. They are designed to work in conjunction with each other and changing or disabling them can lead to undesirable results. Always test in a Sandbox environment before changing Trigger Handlers in production!

Create a New Trigger Handler

Review the steps to add a custom Apex class to the TDTM architecture.

- Coding your custom Apex class.
- Writing a test Apex class.
- Creating a Trigger Handler for your custom Apex class.
- Testing in a sandbox environment.
- Deploying to production.

Creating custom Apex classes is beyond the scope of this article. TDTM is also used in the Nonprofit Success Pack (NPSP). For a detailed walk-through, see Deploy a Custom Apex Class in the TDTM Framework for NPSP.

Monitor TDTM Framework Changes

If you've created custom triggers, stay current with product releases to identify any changes to our TDTM framework that might require changes to your custom triggers.

For example, EDA version 1.100 introduced the `TDTM_Event`, `TDTM_Lead`, `TDTM_Task`, and `TDTM_User` Trigger Handlers. If you had previously created custom triggers for any of these objects, we recommend deleting your custom triggers. Maintaining one trigger for each object helps avoid re-entrance issues.

Add the User Managed Field to the Trigger Handler Page Layout

This article will walk you through adding the User Managed field to the Trigger Handler Page Layout in Education Data Architecture (EDA).

In EDA version 1.37 we modified how EDA manages trigger handler objects and made it easier for developers building on top of EDA to take advantage of TDTM. Part of those changes included a field named "**Owned by Namespace**". **Owned by Namespace** is a text field that developers or admins can use to logically group their Trigger Handlers together.

EDA uses **Owned by Namespace** to manage its own Trigger Handlers. The field allows EDA to know if there were changes or updates, or even if a trigger handler was deleted during an upgrade. This means if a dev or admin adds a common value to **Owned by Namespace** for all of their Trigger Handlers they will be isolated from EDA or other packages using TDTM. This isolation means they will not need to protect their trigger handlers with **"User Managed"**.

If a Trigger Handler object does not have a value in **Owned by Namespace** the Trigger handler object can still be protected by the use of the **User Manage** field. This behaviour has not changed. Setting **User Managed** on an EDA Trigger Handler will still allow users to override it and EDA will skip over the record during upgrade even if there were changes to the Trigger handler definition.

We recommend applying the **Owned by Namespace** field with a common value for all the Trigger Handler objects a developer has created. This gives them several advantages. First, using the **Owned by Namespace** field allows the developer to store the definitions in a class which can be saved in source control. Then they can pass their configuration into the EDA TDTM Global API and EDA will perform the processing for them.

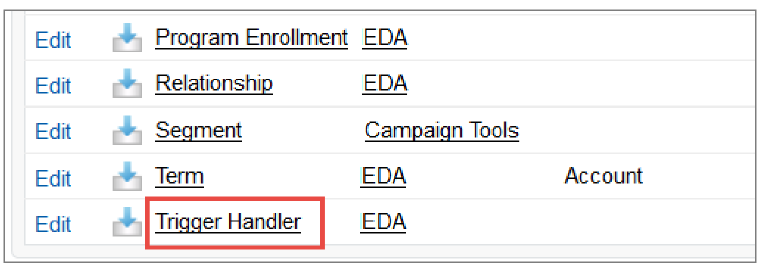
> **Important**
> The **Owned by Namespace** and the **User Managed** field is hidden in any EDA org where the initial package version is 1.34 or lower and needs to be added to the Trigger Handler Page Layout.

This article will explain how to add these fields.

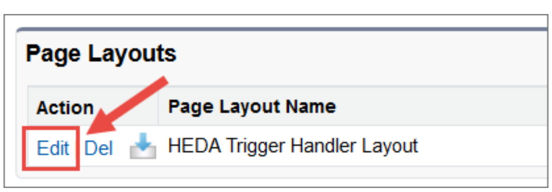
Add the User Managed Field (Salesforce Classic Interface)

Complete these steps to add the User Managed field in Salesforce Classic.

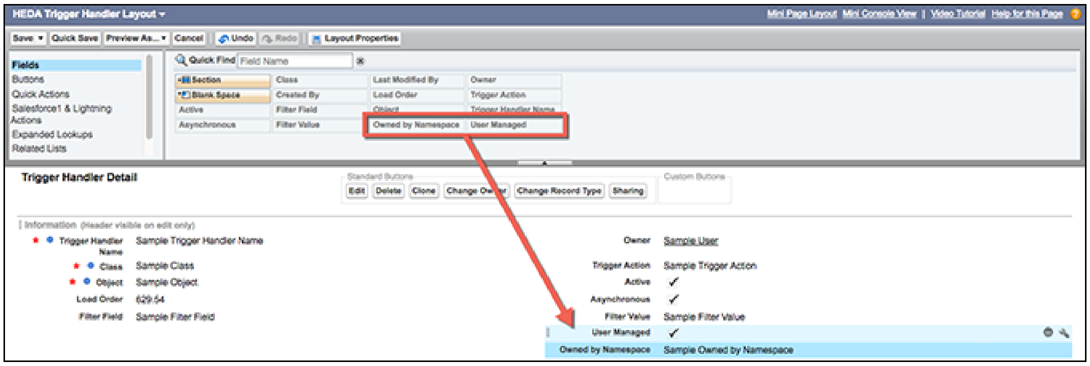
1. Click **Setup**.
2. In the Quick Find box, enter `objects`, then select **Objects**.
3. In the list of objects, click **Trigger Handler**.



4. Scroll down to the Page Layouts related list and click **Edit**.



5. Drag the **Owned by Namespace** and the **User Managed** field onto the page layout.



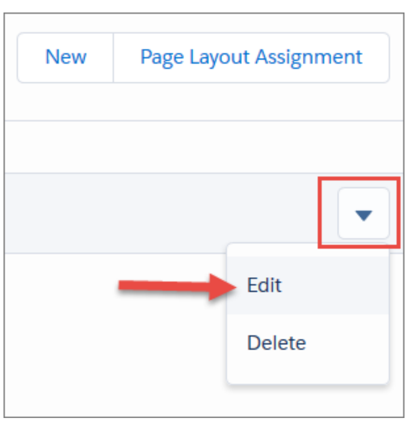
6. Click **Save**.

Add the User Managed Field (Lightning Experience Interface)

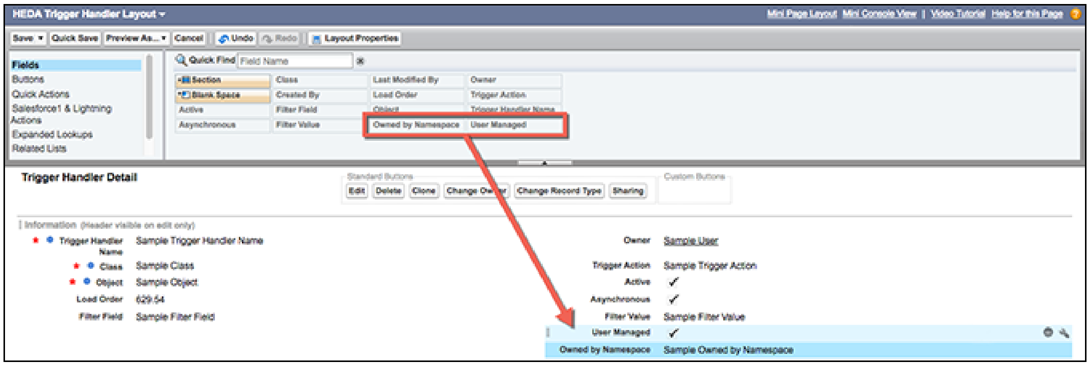
Complete these steps to add the User Managed field in Lightning Experience.

1. Click , then click **Setup**.
2. Click the **Object Manager** tab.

3. Click **Trigger Handler**.
4. Click **Page Layouts**.
5. Click the drop-down arrow to the right of the page layout name, then click **Edit**.



6. Drag the **User Managed** field onto the page layout.



7. Click **Save**.

You can now either enable or disable any trigger and the "pushes" from new versions will not affect your customisations.

We hope this has helped!

Disable Trigger Handlers for EDA

To successfully run custom code, a large data import, or an external integration, you sometimes need to disable TDTM Trigger Handlers.

Disable Trigger Handlers

Review examples of when you can disable trigger handlers for EDA.

> **Note**
> If you need a refresher on the fundamentals of TDTM, read Table-Driven Trigger Management Overview.

- Temporarily disable certain Apex classes when inserting a large volume of records with data that is already structured in its final format.
- Disable Address-related Apex code when inserting or updating Contacts through a scheduled ETL job that always runs as a specific User.
- Prevent the Primary Account lookups from changing on a Contact when that Contact meets certain criteria (such as Deceased=True).

It's helpful to know what each of the Apex classes do, so that you know which Trigger Handlers to disable. Visit EDA Codebase Documentation for a description of the Apex classes managed by TDTM (designated by `_TDTM` extension in the name.) Note that there are some classes that are not managed by TDTM, such as utility and settings classes.

> **Important**
> Be careful when changing Trigger Handler records. They're designed to work in conjunction, and changing or disabling them can lead to undesirable results. Always test in a Sandbox environment before changing Trigger Handlers in production!

Disable Trigger Handlers for All Users

You typically disable a Trigger Handler for all users if you have a custom process or custom code that replace functionality. You may also disable a Trigger Handler for all users if you have a use case that requires that the standard behaviour of an Apex class not occur for all users.

To disable a Trigger Handler:

1. Click the **Trigger Handler** tab. If you don't see it, find it in the App Launcher .
2. Click in the row for the Trigger Handler you want to disable, and select **Edit**.
3. Deselect the **Active** checkbox.
4. For all EDA-packaged Trigger Handlers, select the **User Managed** checkbox.

   > **Important**
   > You must select User Managed to prevent the Trigger Handler from being reactivated during the next package update.

5. Click **Save**.

To re-activate a Trigger Handler:

1. Select the **Active** checkbox.
2. Deselect **User Managed**.
3. Click **Save**.

For more information on editing Trigger Handlers, see Edit a Trigger Handler.

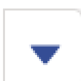
Disable Trigger Handlers for Specific Users

In cases where you have a custom integration with another system, or need to perform periodic imports of data where you don't need certain Trigger Handlers to run, you can disable a Trigger Handler for specific users.

For example, let's say you have an external data source that already supplies an Account for Contacts. During the integration, you wouldn't want to run the code that creates Accounts (the ACCT_IndividualAccounts_TDTM class.) To stop that code from executing when the import runs, you would exclude the integration user from the Trigger Handler record for the ACCT_IndividualAccounts_TDTM class.

> **Note**
> As a best practice, dedicate a user account, called an API User, for your integrations. That way, if an actual user leaves your organisation, you'll always have an active user with the correct permissions available for your integration. Read Create a Secure Salesforce API User in Salesforce Help for more information.

To disable Trigger Handlers for specific users:

1. Click the **Trigger Handler** tab. If you don't see it, find it in the App Launcher.
2. Click  in the row for the Trigger Handler you want to disable, and select **Edit**.
3. Enter one or more usernames, separating each with a semicolon, in the **Usernames to Exclude** field. For example, `integration@user.org;tester@user.org`
4. Click **Save**.

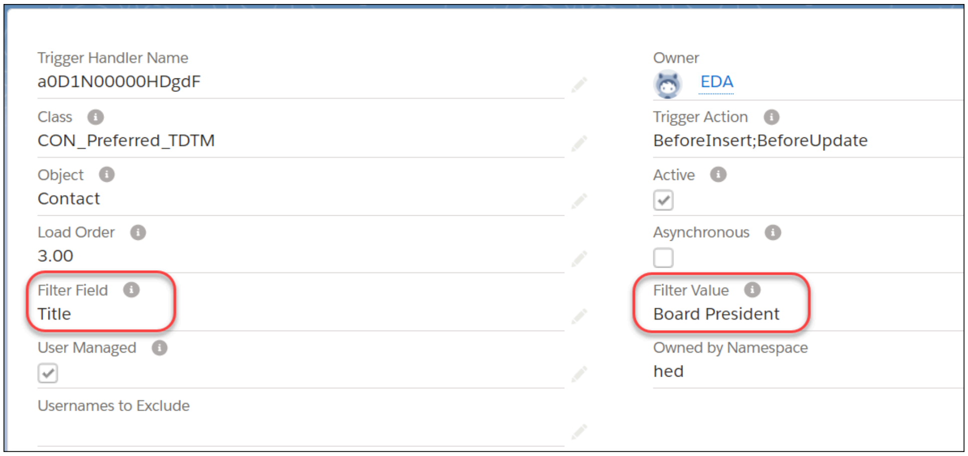
> **Note**
> If you don't see the Usernames to Exclude field, you may need to add it to your page layout and assure it's visible through field-level security. For information about updating your page layout, see Display a New Custom Object After a Product Release.

Disable Trigger Handlers with Field Criteria

You can disable a Trigger Handler based on the value of a field found on the object that the Trigger Handler is associated with, or a field value on a related record.

The EDA Trigger Handler object contains two fields, Filter Field and Filter Value. Together, they allow you to disable a Trigger Handler when the value of a given field is present on a record.

For example, let's say that if a Contact's Title = Board President, you don't want the standard email and phone fields to update when the custom email and phone fields such as Home Phone, Work Phone, University Email, change. You plan to manage the standard email and phone fields manually in this example.



Find the Trigger Handler that controls this aspect of the platform automation. The Class field often provides a clue, but you can also read the EDA Codebase Documentation for more details. In our example, the Trigger Handler we want is `CON_Preferred_TDTM`.

> **Note**
> As a best practice, check the **User Managed** checkbox if you are modifying an EDA Trigger Handler record.

When working with Filter Field and Filter Value:

- You can use only one field and one value for Filter Field & Filter Value.
- Use the API Name for Filter Field (such as `FirstName`, `MailingCity`, `Citizenship__c`).
- If you use an EDA packaged custom field, do not include the namespace prefix. For example use `Citizenship__c` not `hed__Citizenship__c`.
- If you use a third-party packaged custom field, DO include the namespace prefix.
- For Filter Value, the match is an exact character match. There aren't options for conditionals such as contains, starts with, and so on. However, the text is not case sensitive. New York City and new york city are evaluated the same way.
- For checkbox fields, use True or False in the Filter Value field.
- Fields on related records can be used in Filter Field. For example, on a Contact Trigger Handler, you can use `Account.BillingCity`.
- Leave Filter Value blank if you want to filter on a blank (null) value.
- Compound fields such as Address and Geolocation are not supported.

Disable Trigger Handlers with Apex

Sometimes it's necessary to temporarily disable Trigger Handlers only during the execution of Apex code. NPSP offers two ways to achieve this depending on whether you want to disable specific Trigger Handlers or all Trigger Handlers at once.

> **Note**
> This section is intended for developers and advanced admins who are familiar with Apex. The bottom line is that you can temporarily disable a Trigger Handler with code instead of editing the Trigger Handler records manually. If the options for disablement discussed earlier in this article don't address your use case, know that you can manage Trigger Handlers with code, too.

Sometimes it's necessary to temporarily disable specific Trigger Handlers only during the execution of Apex code. For example, you should do so at the start of unit tests when there’s a custom object in your org with the same API name as one released by EDA (such as Application__c) and a TDTM Trigger Handler for that object. To achieve this, EDA uses the `TDTM_Global_API` class and its `tdtmToken` method that mirrors the fields on the Trigger Handler object. As such, you can disable Trigger Handlers directly in your code and only for the execution context of the current user.

The `tdtmToken` method has the following behaviours:

- Changes made to `tdtmToken` values persist throughout the execution context for the current User.
- Changes made to `tdtmToken` do not impact other Users working in the org at the same time.
- Changes made to `tdtmToken` are not committed to the database by EDA.

See the EDA Codebase Documentation for more information on the `TDTM_Global_API` class.

Code example:

```
for (hed.TDTM_Global_API.TdtmToken tdtmToken :
 hed.TDTM_Global_API.getTdtmConfig()) {
    // disable for a specific trigger handler class
        if (tdtmToken.className == 'Application_TDTM') {
            tdtmToken.active = false;
        }
    // disable for an entire object
         else if (tdtmToken.targetObject == 'Contact') {
            tdtmToken.active = false;
        }
    // disable all EDA-provided trigger handlers
         else if (tdtmToken.ownedByNamespace == 'hed') {
            tdtmToken.active = false;
        }
```

```
}
```

Note

Order of execution is important here. Let's say you create your own Apex trigger on the Contact object that disables all the Trigger Handlers on Contact. There is no guarantee that your trigger will run before or after TDTM does. Dealing with this scenario will vary depending on your specific use case. Consider execution order carefully in your code design.

Deploy a Custom Apex Class in the TDTM Framework for EDA

Follow these steps to create Apex classes that use the TDTM design for EDA.

Education Data Architecture (EDA) relies heavily on Apex to implement much of its functionality. Salesforce.org products use one trigger per object and Table-Driven Trigger Management (TDTM) to control the execution of Apex classes. You should familiarise yourself with the TDTM architecture if you're developing custom Apex code, or integrating an external system with Salesforce. You don't need to create new triggers for common standard objects such as Contacts and Accounts, or for EDA custom objects. TDTM is extensible. When you write your own code, you only need to write Apex classes within the TDTM framework. You can create custom triggers and classes that work within the TDTM framework for your custom objects as well.

Note

If you need a refresher on the fundamentals of TDTM, read Table-Driven Trigger Management (TDTM) Overview .

Summary of Steps

Here's an overview of the steps to deploy your custom Apex class in the TDTM framework.

1. Create your Apex class. The class must:
   a. Use `Global`, not `Public` access modifier.
   b. Extend the `hed.TDTM_Runnable` class.
   c. Override the `TDTM_Runnable` run method, which returns a `hed.TDTM_Runnable.DmlWrapper` and takes the following parameters:
      i. `List<SObject> newlist`
      ii. `List<SObject> oldlist`
      iii. `hed.TDTM_Runnable.Action triggerAction`
      iv. `Schema.DescribeSObjectResult objResult`
   d. Use `DMLWrapper` for efficient DML operations.
2. Write your test class.
3. Add a Trigger Handler record with the appropriate field data.

Tip
As a best practice, use `_TDTM` as the suffix for your class (example: `OPP_MyAwesomeClass_TDTM.cls`)

Technical Overview

In TDTM design, our triggers call the *`TDTM_TriggerHandler`* class and pass it all the environment information.

The actual business logic that needs to run when an action occurs on a record is stored in classes. We created a custom object, `Trigger_Handler__c`, to store which classes should run for each object, along with the related actions. In this object, we also define whether the class is active or inactive, in which order it should execute for the same object, and other settings. The Trigger Handler then calls these classes when appropriate, which provides the advantage of running all the DML operations at the end of execution through the *`DmlWrapper`* class. For more information about the Trigger Handler object, read Manage Trigger Handlers.

Note
Our codebase is open source. Explore the Trigger Handler class and see how our package code implements the TDTM framework in our GitHub repository. This is a public repository and you can contribute code if you wish.

Not every Salesforce object has a TDTM trigger. View the TDTM triggers we include in the EDA package here: https://github.com/SalesforceFoundation/EDA/tree/main/force-app/main/default/triggers. Keep in mind that these Trigger Handlers don't appear in the Trigger Handlers tab. They trigger EDA-specific TDTM handlers that are Active. EDA doesn't have product-specific TDTM handlers for these objects.

If you create your own custom objects, or want to run a TDTM class on a standard object that doesn't have a trigger provided by the package, you can create a trigger within the TDTM framework. Use the `TDTM_Global_API` global class and reference the `hed` namespace. Here's an example code snippet:

```
trigger TDTM_MyCustomObject on MyCustomObject__c (after delete, after insert,
 after undelete,after update, before delete, before insert, before update) {

hed.TDTM_Global_API.run(Trigger.isBefore, Trigger.isAfter, Trigger.isInsert,
 Trigger.isUpdate, Trigger.isDelete, Trigger.isUndelete, Trigger.new,
 Trigger.old, Schema.SObjectType.MyCustomObject__c);
}
```

Create an Apex Class

Here's an example of a custom class that follows the TDTM design:

```
// Trigger Handler Class on CampaignMember, to reset any Contact's
 HasOptedOutOfEmail field

global class CM_ClearEmailOptOut_TDTM extends hed.TDTM_Runnable {

   // the Trigger Handler’s Run method we must provide
   global override hed.TDTM_Runnable.DmlWrapper run(List<SObject> newlist,
 List<SObject> oldlist,
       hed.TDTM_Runnable.Action triggerAction, Schema.DescribeSObjectResult
 objResult) {

       hed.TDTM_Runnable.dmlWrapper dmlWrapper = new
 hed.TDTM_Runnable.DmlWrapper();

       if (triggerAction == hed.TDTM_Runnable.Action.AfterInsert) {
           list<ID> listConId = new list<ID>();

           for (CampaignMember cm : (list<CampaignMember>)newlist) {
               if (cm.ContactId != null) {
                   listConId.add(cm.ContactId);
               }
           }
           list<Contact> listCon = [select Id, HasOptedOutOfEmail from Contact
 where Id in :listConId];
           for (Contact con : listCon) {
               con.HasOptedOutOfEmail = false;
           }
           dmlWrapper.objectsToUpdate.addAll((list<SObject>)listCon);
       }
       return dmlWrapper;
   }
}
```

Note that because the class is external, you need to declare the class and its method global, and use the `hed` prefix when calling classes inside the EDA package. If you use the public identifier instead, you won't get an error, but you won't see the expected behaviour either. It will appear as if the class doesn't exist or is inactive.

Additionally, if the class you are writing is inside another managed package, include the package prefix when entering the class name in the `Class__c` field of the Trigger Handler record. In our example, if `CM_ClearEmailOptOut_TDTM` was inside a managed package with prefix `foo`, its name should be entered as `foo.CM_ClearEmailOptOut_TDTM`.

Note
If you have a custom trigger that calls a TDTM handler or a TDTM class for one of the objects that we already provide a trigger for, make sure to prevent re-entrance for the object or delete your trigger to avoid calling the class twice.

Create a Test Class

After creating your custom Apex class, write your test class.

1. By default, test classes can't see data in your org. Information about your Trigger Handler record resides in the Trigger Handler object and as a result, you must load the default Trigger Handlers into memory using the `TDTM_Global_API` class and `getTdtmToken` method.

```
List<hed__TDTM_Global_API.TdtmToken> tokens =
 hed.TDTM_Global_API.getTdtmConfig();
```

   Read more about this globally exposed class and its methods at EDA Codebase Documentation.

2. Add information about your Trigger Handler. For example:

```
tokens.add(new hed.TDTM_Global_API.TdtmToken('MyAccAwesomeClass_TDTM',
 'Account', 'AfterInsert;AfterUpdate;AfterDelete', 2.00));
```

3. Pass your Trigger Handler configuration as a parameter of the `setTdtmConfig` method:

```
hed.TDTM_Global_API.setTdtmConfig(tokens);
```

4. Insert your data and test your Trigger Handler:

```
// setup our test data...
test.startTest();
// do some operations...
test.stopTest();
// validate our results...
```

Here's an example of a test class that follows the TDTM design:

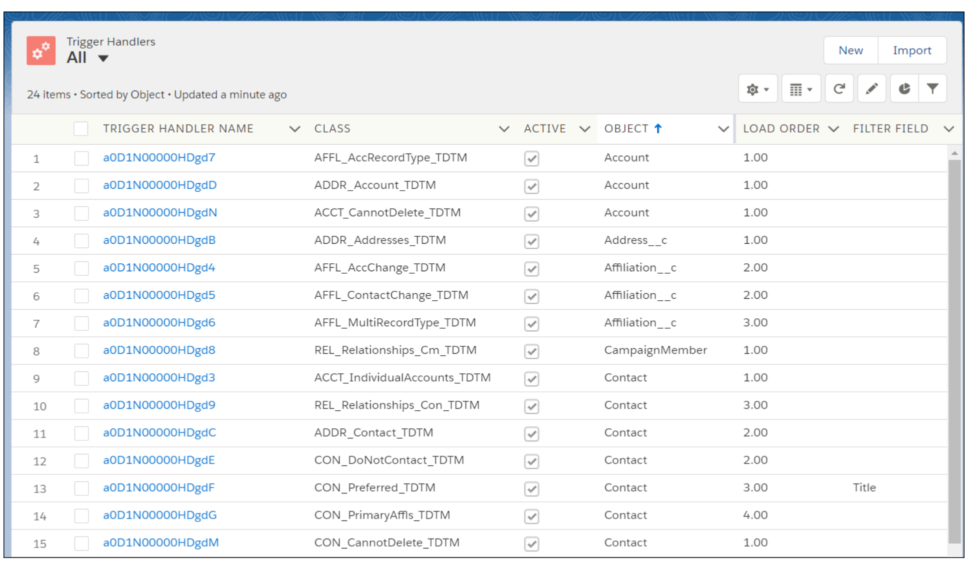
```
@isTest
public class MyTriggerHandler_TEST {

   @isTest
   static void testCMTrigger() {

       // first retrieve default EDA trigger handlers
       List<hed.TDTM_Global_API.TdtmToken> tokens =
 hed.TDTM_Global_API.getTdtmConfig();

       // Create our trigger handler using the constructor
    tokens.add(new hed.TDTM_Global_API.TdtmToken('MyAccAwesomeClass_TDTM',
 'Account', 'AfterInsert;AfterUpdate;AfterDelete', 2.00));

       // Pass trigger handler config to set method for this test run
      hed.TDTM_Global_API.setTdtmConfig(tokens);

       // setup our test data...
       test.startTest();
       // do some operations...
       test.stopTest();
       // validate our results...
   }
}
```

Create a Trigger Handler Record

When you create a custom class of your own, you must also create a `Trigger_Handler__c` record that references the class.

Read Manage Trigger Handlers for more information.

There must be a `Trigger_Handler__c` record for each class managed by TDTM. Take a look at the Trigger Handler tab to see the list of `Trigger_Handler__c` records in your org.



	TRIGGER HANDLER NAME	CLASS	ACTIVE	OBJECT	LOAD ORDER	FILTER FIELD
1	a0D1N00000HDgd7	AFFL_AccRecordType_TDTM	✓	Account	1.00	
2	a0D1N00000HDgdD	ADDR_Account_TDTM	✓	Account	1.00	
3	a0D1N00000HDgdN	ACCT_CannotDelete_TDTM	✓	Account	1.00	
4	a0D1N00000HDgdB	ADDR_Addresses_TDTM	✓	Address__c	1.00	
5	a0D1N00000HDgd4	AFFL_AccChange_TDTM	✓	Affiliation__c	2.00	
6	a0D1N00000HDgd5	AFFL_ContactChange_TDTM	✓	Affiliation__c	2.00	
7	a0D1N00000HDgd6	AFFL_MultiRecordType_TDTM	✓	Affiliation__c	3.00	
8	a0D1N00000HDgd8	REL_Relationships_Cm_TDTM	✓	CampaignMember	1.00	
9	a0D1N00000HDgd3	ACCT_IndividualAccounts_TDTM	✓	Contact	1.00	
10	a0D1N00000HDgd9	REL_Relationships_Con_TDTM	✓	Contact	3.00	
11	a0D1N00000HDgdC	ADDR_Contact_TDTM	✓	Contact	2.00	
12	a0D1N00000HDgdE	CON_DoNotContact_TDTM	✓	Contact	2.00	
13	a0D1N00000HDgdF	CON_Preferred_TDTM	✓	Contact	3.00	Title
14	a0D1N00000HDgdG	CON_PrimaryAffls_TDTM	✓	Contact	4.00	
15	a0D1N00000HDgdM	CON_CannotDelete_TDTM	✓	Contact	1.00	

Load Order is important in TDTM. If you want your code to fire after EDA packaged code, choose a number after the last number used for your object. For example, you could use 2 for a custom Account class. You can also use decimals if you want your code to run between two other classes. For example, you could use 2.5 for a custom Contact class.

Ongoing Administration

Keep up with releases, find the release version, set up new features, review custom settings and run settings health check, learn about feature telemetry, and uninstall EDA.

Keep Up with EDA and Salesforce Releases

Stay informed about Salesforce.org product updates and release schedule.

Keep Up with Salesforce Releases

As an admin, keeping up with releases is an important part of the job. Staying up-to-date on frequent product releases means anticipating when your orgs will get updated, staying informed about what's included in each release, and forming a strategy for testing and implementing new features.

To stay informed about updates to the Salesforce.org products you use, we recommend joining the Education Release Readiness group in the Trailblazer community.

For detailed information on how to keep up with releases, see:

- Keep Up with Salesforce.org Releases
- Keep Up with Salesforce.com Releases
- Salesforce.org Release Notes

Find the Release Version

Identify the current version and originally installed version of Education Data Architecture (EDA).

Which Version Am I Using?

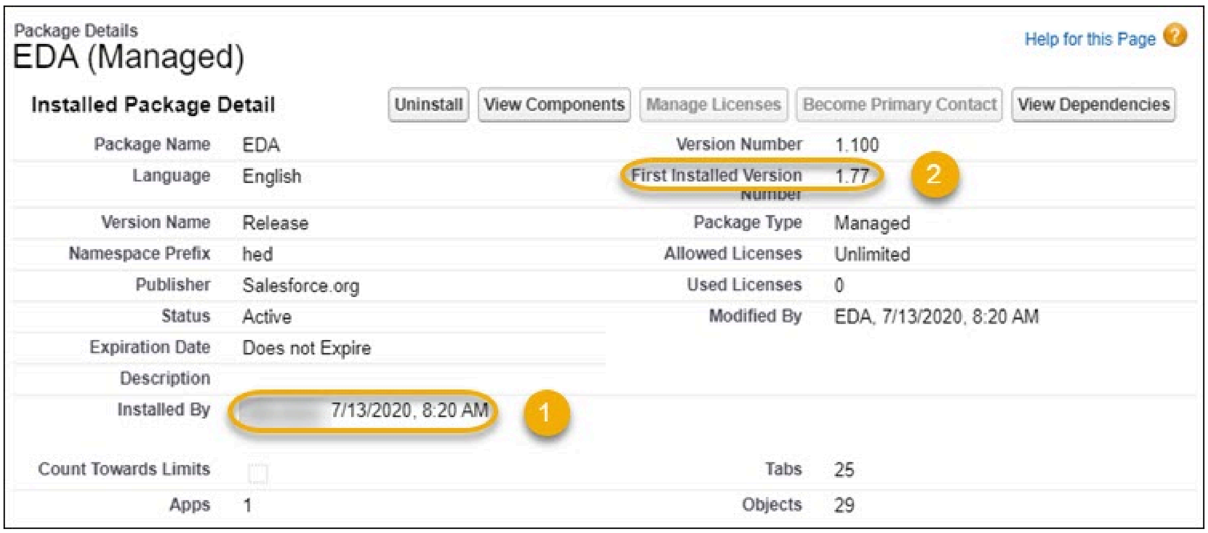
Identify the version of the EDA managed package in your org.

1. Click , then click **Setup**.
2. Enter `Installed Packages` in the Quick Find box, then click **Installed Packages**.
3. Find the **EDA** package, then look at the **Version Number**.

Which Version Was Originally Installed?

Some new features require additional setup if you installed the product prior to a certain version or date. To figure out which version you started with, look in the Release Announcements group for the date of the major release announcement corresponding to your original installation date.

1. Click , then click **Setup**.
2. Enter `Installed Packages` in the Quick Find box, then click **Installed Packages.**
3. Click the **EDA** package name.
4. On the package detail page, look in the Installed By field (1) for the date the package was first installed.



> **Note**
> Don't rely on the number in First Installed Version (2), which isn't necessarily correct.

5. Navigate to the EDA Release Announcements group.
6. Make sure the posts are sorted by Latest Posts instead of Most Recent Activity.

7. Scroll through the posts to find the version that was released closest to (but not after) your installation date, which is your first installed version.

Set Up New Features and Activate Major Releases

Learn how to activate an EDA release for the latest release enhancements and bug fixes.

About EDA Releases and Versions

We release major new versions of EDA three times a year. In addition, every two weeks we release minor updates (bug fixes and enhancements), with occasional exceptions for holidays and major Salesforce releases.

We use the standard versioning convention in which the number to the left of the dot identifies the major release and the number to the right of the dot identifies the minor release. So for example, 2.x is newer than any version numbered 1.x, and 2.24 is 21 releases newer than 2.3.

See our article, Keep Up with Salesforce.org Releases for more information on releases and release dates.

Activate a Release

EDA administrators have until the next major release to set up new features and activate the current release.

Many new features and enhancements in major releases are behind a release gate. Release gates allow us to upgrade your instance to the most recent version of EDA while keeping selected (gated) functionality from going live in your org. With release gates, your orgs always get the push upgrade, and you can control when you activate the functionality that's behind the gate.

When we push a major release to Sandbox, we activate the current release on all sandboxes that are still on the previous release. See our article, Keep Up with Salesforce.org Releases for more information on releases and release dates.

> **Note**
> Not every release will have gated features. Be sure to read the EDA release card in the Release Management section of Education Cloud Settings.

Here's how to set up new features and activate a release.

1. On the day of the major Sandbox release, go to the Education Cloud Settings page and click **Go to Release Management** to read about the new features. Think about and plan for the best time to set them up.
2. Before the next major Sandbox release, follow the links from the EDA Release Manager to the documentation and in your sandbox environment complete the required setup tasks for each new feature or enhancement. If desired, further customise the feature for your institution. Not every new feature requires setup. When setup is required, however, you might need to perform one or more of these tasks.
   - Set or verify object and field permissions for system administrator and other profiles
   - Assign Apex class access to profiles
   - Configure sharing settings for relevant objects
   - Configure record types and picklists
   - Configure object tabs, related lists, and list views
   - Create or customise Lightning record pages or Lightning components
   - Complete other, feature-specific setup tasks
3. When all gated features are configured in your sandbox environment, on the Education Cloud Settings page, in the Release Management component, click **Activate Current Release**.

   > **Important**
   > Be sure you're ready to activate when you click the button. Once a release is activated, it can't be deactivated.

4. Verify that everything works as expected in Sandbox.
5. In Production, repeat the configuration and activate the release. Then verify that everything works as expected in Production, too.

It's important to complete all required setup for each release's new features even if you don't intend to use the features in your org. Security settings are especially critical to keep up-to-date. *Setting up new features within one major release and keeping security settings current helps prevent your users from experiencing errors*.

Custom Settings Reference

This article contains a summary of the EDA Hierarchy Settings in Custom Settings.

Custom Settings Reference

EDA Hierarchy Settings

These settings control EDA behaviour for your entire org. We recommend not modifying the default value from within Custom Settings. Instead, make changes in EDA Settings. In some cases (for example, when functionality that's available in Hierarchy Settings is not yet available in EDA Settings), you might need to change these values in Custom Settings. This table indicates which values you can safely change.

Note
If you installed EDA before version 1.100, some of the descriptions you'll see in your org have been replaced with the updated descriptions below. You can safely update descriptions and help text directly in custom settings.

Field	Description	Can Admins Specify a Different Default Value?
Account Processor	ID of the default record type for Account. For example, if specifying Administrative (the recommended Account model), enter the ID of the Administrative record type for the Account object.	No
Multi-Address Accounts	Record Types of those Accounts that should have multi-addresses enabled.	No
Accounts to Delete	The record types of Accounts to be automatically deleted if all their associated Contacts have been deleted.	No
Admin Account Naming Format	Stores the default format for Admin Account names.	No
Admin Other Name Setting	Stores other info about Admin Account naming format.	No

Field	Description	Can Admins Specify a Different Default Value?
Administrative Account Record Type	The Account record type used for Administrative Accounts. This setting affects management of Address records and the naming format of Administrative Accounts.	No
Namespace	The namespace of the Gift Entry Manager managed package.	No
Affiliation Record Type Enforced	If enabled, an error results when users populate a Primary field on Contact with an Account that has a record type mismatch to the record type defined in EDA Settings. The Affiliation record is not created and Primary fields on Contact are not corrected.	No
Affil End Date Copy from Prog Enrol	Indicates whether to set the End Date of the Affiliation created with a Program Enrolment. If enabled, set the End Date to the Program Enrolment's End Date. If disabled, don't specify the Affiliation's End Date.	No
Affil Start Date Copy from Prog Enrol	Indicates whether to set the Start Date of the Affiliation created with a Program Enrolment. If enabled, set the Start Date to the Program Enrolment's Start Date. If disabled, don't specify the Affiliation's Start Date.	No
Affil Status When Delete Prog Enrol	If the related setting, Affil Delete When Delete Prog Enrol, is disabled, this setting specifies the value to set for the Affiliation's Status, when its related Programme Enrolment is deleted.	No
Affil Delete When Delete Prog Enrol	Indicates whether to delete an Affiliation when its related Program Enrolment is deleted. If enabled, delete the Affiliation. If disabled, set the Affiliation's status to the value specified in the related setting, Affil Status When Delete Prog Enrol.	No

Field	Description	Can Admins Specify a Different Default Value?
Affil Role When Create Prog Enrol	If the related setting, Affil Set Role When Create Prog Enrol, is enabled, this setting specifies the value to set for the Role on the Affiliation created with a Programme Enrolment.	No
Affil Set Role When Create Prog Enrol	Indicates whether to specify a Role for the Affiliation created with a Program Enrolment. If enabled, set the Affiliation's Role to the value specified in the related setting, Affil Role When Create Prog Enrol. If disabled, don't specify a Role.	No
Affil Status When Create Prog Enrol	The value set for the Status of an Affiliation record automatically created with a Programme Enrolment.	No
Allow Auto-Created Duplicate Relations	Auto-created Relationships are deduplicated to prevent duplication of Relationship records between Contacts. Select Allow Auto-Created Duplicate Relations to disable this behaviour and allow multiple Relationships of the same type between two Contacts.	No
Async Error Check Last Run	The most recent execution date of the Async Job error logger.	No
Automatic Household Naming	If enabled, the Household name is automatically set based on the Household Name Format settings.	No
Address management support for Contacts	Enables multi-address functionality for Contacts.	No
Default Contact Language Fluency	The Fluency value automatically set on newly created Contact Language records when users set the Primary Language lookup field on a Contact.	No
Disable Error Handling	If selected, the custom error handling framework is disabled.	No
Disable Preferred Email Enforcement	When selected, the requirements for the Preferred Email field on Contact are not enforced.	No

Field	Description	Can Admins Specify a Different Default Value?
Enable Course Connections	When enabled, allows users to choose the Contact type (Faculty or Student) when creating a Course Connection record. This feature requires default Contact record types to be set for active students and faculty.	No
Enable Debug	Select to enable debug statements in managed package code.	Yes
Enable New Preferred Phone Sync	Sync the Preferred Phone field to the Contact's standard Phone field and validate that the value in Preferred Phone exists and has a value.	No
Error Notification Recipients	Stores the type of user to send error notifications to.	No
Faculty Record Type	The default Contact record type for Faculty when creating a Course Connection record.	No
Household Account Naming Format	Stores the Household Account Naming Format.	No
Household Addresses Acc Record Type	The Account record type used for Household Accounts. This setting affects management of Address records and the naming format of Household Accounts.	No
Household Other Name Setting	Stores other info about the Household Account naming format.	No
Preferred Phone Selection	Select a desired Preferred Phone when the Preferred Email/Phone Data Cleanup batch job runs.	No

Field	Description	Can Admins Specify a Different Default Value?
Prevent <object name> Deletion	Prevent the deletion of the named object's records when they have related a certain type of child record. Refer to Apex Class Descriptions for EDA for details about the child record dependencies of a given object type. **Note** If you enable any of the Prevent Deletion settings in Hierarchy Settings, note the following: • If you disable a TDTM class for an object, the associated Prevent Deletion setting will be disabled even if you try to enable it in Hierarchy Settings. • Disable Prevent Deletion-related settings before merging records or deleting duplicate records.	Yes
Reciprocal Method	Determines the method used to generate the reciprocal relationship. Either List Setting, which uses custom settings by gender, or Value Inversion, which inverts the type if appropriate ("Parent-Child" to "Child-Parent").	No
Relationship Name Field Id	This field is currently not used in EDA.	No
Relationship Name Id Field Id	This field is currently not used in EDA.	No

Field	Description	Can Admins Specify a Different Default Value?
Simple Address Change Treated as Update	When enabled, changes to single Contact or Account address fields are treated as updates to the existing address (for example, no new Address object is created). Also causes white space and case changes to be treated as updates.	No
Store Errors	Enable this feature to store errors.	No
Student Record Type	The default record type when creating Course Connections for active students.	No
Validate Programme Plan for Nested PR	When selected, Plan Requirements can specify either a Program Plan or a parent Plan Requirement, but not both. For example, a Plan Requirement that has a parent Plan Requirement can't also specify a Program Plan, or vice versa. If you specify both a Program Plan and a parent Plan Requirement, an error message will prevent you from saving until only one is selected.	No

Settings Health Check

Identify configuration errors in EDA Settings and related settings.

Settings Health Check

Run Settings Health Check to look for configuration errors in EDA Settings and related settings in Setup.

Settings Health Check reports passed and failed validations and recommends fixes for errors it finds. Settings Health Check validates EDA Settings related to Accounts, Affiliation mappings, Reciprocal settings, and Course Connections. For example, if more than one Affiliation mapping specifies the same Account record type, that validation fails. If a mapping involves an Account record type that isn't marked Active in Setup or doesn't exist, those validations fail, too.

Note

My Domain must be enabled in your org or you won't be able to access Settings Health Check. To verify that it's enabled, go to Setup, then search for and select **My Domain**. To learn more, see My Domain in Salesforce Help.

Access Settings Health Check

The way you access Settings Health Check depends on the version of EDA you originally installed.

- If you started with EDA 1.114 or later, access Settings Health Check from the Education Cloud Settings tab.
- If you started with EDA 1.114 or earlier and you can see the Health Check tab in your org, remove access to it for all profiles and, instead, access Health Check from the Education Cloud Settings tab.

To add the Education Cloud Settings tab to your org, see Education Cloud Settings.

Run Settings Health Check

Run settings health check from Education Cloud Settings in EDA.

From the Education Cloud Settings tab:

1. From Tools, click **Go to Settings Health Check**.
2. Click **Run Settings Health Check**.
3. When Settings Health Check completes, follow the recommended fix for any failed checks, and then rerun Settings Health Check.

Settings Health Check Guidelines

Keep these guidelines in mind for specific checks.

Settings Type	Validation Logic
Affiliation Mappings	• Validation applies to all Affiliation mappings, including preconfigured and custom mappings. • Account record types used in Affiliation mappings fail validation unless they're marked Active. • Validation of Auto-Enrolment Status and Auto-Enrolment Role values applies to only the Affiliation mappings that have Auto-Enrolment selected.

Settings Type	Validation Logic
Course Connections	Student and Faculty Course Connection record type validation applies only if Course Connection Record Types is enabled in EDA Settings.
Reciprocal Relationships	• Validation applies to all Reciprocal Relationships, including preconfigured and custom settings. • Validation applies to all Reciprocal Relationships even if they aren’t marked Active. • Validation assumes that you're using List Setting as the Reciprocal Method for creating Reciprocal Relationships. If you're using the Value Inversion method, validation still applies, but reported errors aren't meaningful. **Note** For details about avoiding Settings Health Check failures, see Configure Relationship Settings and Relationship.

EDA Feature Telemetry

Learn how Salesforce collects EDA Feature Telemetry data to understand the level of usage and adoption of various EDA features.

Feature Telemetry

EDA Feature Telemetry collects feature and usage metrics when customers use our products.

This information provides us with valuable insight into how EDA is used by our customers. We use this information to understand the level of usage and adoption of various EDA features. **No personally identifiable information is collected through EDA Feature Telemetry**. We only collect information about what features an organisation has enabled or not.

Three data types can be collected: Boolean (True/False), Integer, and Date. EDA Feature Telemetry data is collected during the push upgrade process.

Accounts and Naming

- How many orgs are using the Administrative Account model as the default setting?
- How many orgs are using the Household Account model as the default setting?
- How many orgs are using an Administrative Account custom naming format?

- How many orgs are using a Household Account custom naming format?
- How many Administrative Accounts exist in the org?
- How many Household Accounts exist in the org?
- Is automatic household naming enabled?
- How many orgs are using Household Account in the Accounts Without Contacts setting?
- How many orgs are using Academic Programme in the Accounts Without Contacts setting?
- How many orgs are using Educational Institution in the Accounts Without Contacts setting?
- How many orgs are using Business Organisation in the Accounts Without Contacts setting?
- How many orgs are using University Department in the Accounts Without Contacts setting?
- How many orgs are using Automatically Rename Household Accounts?
- How many orgs have enabled Automatically Rename Household Accounts?

Affiliations

- How many orgs are using the Affiliations Related to Deleted Programme Enrolments setting?
- How many orgs are using the Affiliation Start Date setting?
- How many orgs are using the Affiliation End Date setting?

Relationships

- How many auto-create relationship rules exist in this org for Campaign Members?
- How many auto-create relationship rules exist in this org for Contacts?
- How many orgs are using Value Inversion relationships?

Seasonal Address

- How many Seasonal Addresses exist in the org?
- How many Seasonal Addresses were created in the last 12 months?

System Information

- How many orgs have one or more user-managed TDTM classes?
- How many orgs have disabled one or more EDA TDTM classes?

- Is EDA error handling enabled in this org?
- Are error logs being stored in this org?
- How many orgs have All Sys Admin selected for the Error Notifications Recipients setting?

Other Metrics

- How many active record types does an org have for Course Connection?
- How many records of the following types does this org have?
  - Errors
  - Programme Plans
  - Plan Requirements
  - Course Connections
  - Course Offering Schedules
  - Term Grades
  - Facilities
- How many orgs aren't using the Extended Description field on the Course object?
- How many orgs have old values in the Ethnicity field on the Contact object?
- How many orgs aren't using Course Connections?
- When was Settings Health Check last run?
- How many auto-enrolment mappings are there for Programme Enrolment?
- How many orgs are using the Application Window Validation setting?

Uninstall EDA

Follow these steps to uninstall EDA.

Uninstall the Product

We recommend that only Salesforce admins or implementation partners uninstall EDA. The uninstall process can take several hours or more to complete, and your users should not access Salesforce while you're uninstalling EDA.

> **Note**
> If the EDA uninstall process fails due to scheduled jobs, file a support ticket to disable them. For more information, go to Create a Technical Support Case with Salesforce Support.

Back Up Your Data

When you uninstall a package, the process deletes all of its components, custom fields, and data from your Salesforce organisation.

Be sure you understand the impact uninstalling EDA has on your org.

Follow these directions to save a local copy of your data if you want to reimport that data to new custom fields.

Remove Profile Access to EDA

For the System Administrator profile and each custom profile, make sure that EDA isn't the default app.

Remove Profile Access to the EDA Classic App

For the System Administrator profile and each custom profile, make sure that the EDA classic app isn't the default app.

1. From Setup, enter `Profiles` in the Quick Find box and then select **Profiles**.
2. Next to System Administrator, click **Edit**.
3. For the EDA rows, make sure that Default is deselected. If it's selected, select a different default app. You can leave the EDA rows Visible.
4. Save your changes.
5. Repeat these steps for all custom profiles, including the ones that you aren't actively using.

Remove Profile Access to the Education Data Architecture Lightning App

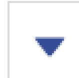
For the System Administrator profile and each custom profile, make sure that the Education Data Architecture Lightning app isn't the default app.

1. From Setup, enter `Profiles` in the Quick Find box and then select **Profiles**.
2. Click **System Administrator** and then click **Edit**.
3. For the Education Data Architecture rows, make sure that Default is deselected. If it's selected, select a different default app. You can leave the Education Data Architecture rows Visible.
4. Save your changes.
5. Repeat these steps for all custom profiles, including the ones that you aren't actively using.

Delete the App

Delete the EDA app as part uninstalling the product.

1. From Setup, enter `App` in the Quick Find box and then select **App Manager**.

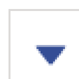
2. Next to Education Data Architecture , click  and then select **Delete**.
3. Click **Delete** again to confirm.

Delete Page Layouts for Standard Objects

You must delete the EDA page layouts.

Sometimes, you'll need to assign or create a non-EDA page layout so that your standard objects still have an active page layout. Delete these EDA page layouts from the following objects:

Object Name	Page Layout to Delete
Account	HEDA Household Layout
Account	HEDA Organisation Layout
Case	EDA Incident Layout
Contact	HEDA Contact Layout

1. From Setup, click **Object Manager**.
2. Click the name of one of the objects listed in the table.
3. Click **Page Layouts**.
4. In the row for the page layout you want to delete, click  and then select **Delete**.
5. Click **Delete** to confirm.
6. To replace the layout that you're deleting, select a non-EDA Page Layout. If there isn't another page layout listed in the Replace with Page Layout menu, you can create one. If you do so, don't copy the layout from an existing EDA layout, but create one from scratch.
7. Click **Replace**.
8. Repeat these steps for each page layout listed in the table.

Remove Elements from Custom Layouts

If you have any EDA page elements (such as buttons or related lists) on non-EDA page layouts, you must remove them.

Uninstall the Package

After you remove all EDA components, uninstall the package.

1. From Setup, enter `Installed Packages` in the Quick Find box, then click **Installed Packages**.
2. Click **Uninstall** next to the package name.
3. Select the checkbox next to **Yes, I want to uninstall this package and permanently delete all associated components**.
4. Click **Uninstall**.

> **Note**
> If the uninstall doesn't succeed the first time you try it, there might be additional EDA components that you need to remove. You are presented with a list of remaining components for each package as you try the uninstall. Remove the additional components and try the uninstall again until you can uninstall all the packages.

Uninstall Record Types

Delete these EDA record types.

Object Name	Record Type to Delete
Account	Academic Program
Account	Administrative
Account	Business Organisation
Account	Educational Institution
Account	Household Account
Account	Sports Organisation
Account	University Department
Case	Incident

Step 1: Remove Access to EDA Record Types

1. From Setup, enter `Profiles` in the Quick Find box and then select **Profiles**.
2. Click **System Administrator**.
3. Under Record Type Settings, next to the object name, click **Edit**.
4. Under Available Record Types, move all record types to the Available Record Types column.
5. Save your changes.

6. Repeat these steps for all custom profiles, including the ones that you aren't actively using.

Step 2: Deactivate EDA Record Types

1. From Setup, click **Object Manager**.
2. Click the name of one of the objects listed in the table.
3. Click **Record Types**.
4. Click the record type that you want to deactivate, and then click **Edit**.
5. Deselect the **Active** checkbox.
6. Save your changes.
7. Repeat these steps for each record type listed in the table.

Step 3: Delete EDA Record Types

1. From Setup, click **Object Manager**.
2. Click the name of one of the objects listed in the table.
3. Click **Record Types**.
4. In the row for the page layout that you want to delete, click and then select **Delete**.
5. Click **Delete** again to confirm.
6. Repeat these steps for each record type listed in the table.

Delete Behaviour Management Support Process

Delete behaviour management support processes as part of uninstalling EDA.

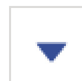
1. From Setup, enter `support` in the Quick Find box and then select **Support Processes**.
2. Next to Behaviour Management, click **Delete**.
3. Click **OK** to confirm.

Remove EDA Unmanaged Fields

Delete these EDA unmanaged fields.

Object Name	Field to Delete
Account	Credentialling Identifier
Contact	Credentialling Identifier
Contact	Primary Academic Program

Object Name	Field to Delete
Contact	Primary Department
Contact	Primary Educational Institution
Contact	Primary Sports Organisation

1. From Setup, click **Object Manager**.
2. Click the name of one of the objects listed in the table.
3. Click **Fields and Relationships**.
4. Next to the field that you want to delete, click  and then select **Delete**.
5. Click **Delete** again to confirm.

Salesforce Configuration Basics for EDA

Display new custom objects, create custom picklist values, add a lookup field, and use related lists and clone layouts to preserve your changes for EDA.

Display a New Custom Object After a Product Release

Decide how to display new objects in your org.

Configure a New or Enhanced Object

When we release new objects, they're not automatically displayed in your existing org.

You can decide how you want to expose the objects to your users by:

- Updating object permissions
- Updating security settings
- Customising navigation and layouts

Set Object and Security Permissions

Some objects might not be applicable to all of the roles in your organisation. You can update object and security permissions for the profiles that you assign to your users so that they see the objects that they need.

Set Custom Object Permissions

1. From Setup, search for and then select **Profiles**.
2. Next to the profile that you want to update, click **Edit**.

3. Under Custom Tab Settings, select **Default On** for the tabs that you want to make available to this profile from the App Launcher, navigation menus, and so on.
4. Under Custom Object Permissions, set the appropriate permissions.
5. Save your changes.

Set Field-Level Security

1. From Setup, search for and then select **Profiles**.
2. Click a profile to open its settings.
3. Under Custom Field-Level Security, click **View** next to the setting that you want to update.
4. Click **Edit** and set the appropriate permissions.
5. Save your changes.

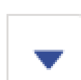
Customise Navigation and Layouts

You can choose how objects appear in your org by adding them to the App Launcher and the navigation bar. You can also edit your layouts to include elements of the new object.

Display or Hide Objects in All Items in App Launcher

1. From Setup, search for and then select **Profiles**.
2. Click a profile to open its settings and then click **Edit**.
3. Under Tab Settings, customise the settings as needed. Consider selecting **Tab Hidden** for tabs that can be accessed easily from other objects. For example, you might hide Plan Requirements because you can access them through Programme Plans.
4. Save your changes.

Add Tabs to the Navigation Bar

1. From Setup, search for and then select **App Manager**.
2. For the desired app, click  and then select **Edit**.
3. Move the desired tabs to Selected Tabs.
4. Save your changes.

Add Fields and Related Lists to Page Layouts

1. From Setup, click **Object Manager**, and then click the object that you want to update.
2. Click **Page Layouts** and then click a page layout.

3. Drag the desired fields from the palette and drop them in the desired section.
4. In the palette, click **Related Lists**.
5. Drag the desired related lists from the palette and drop them in the Related Lists section.
6. Click to display Related List Properties, move the fields that you want to display to Selected Fields, and then click **OK**.
7. Save your changes.

Customise Search Layouts

1. From Setup, click **Object Manager**, and then click the object that you want to update.
2. Click **Search Layouts**.
3. For the desired layout, click and then select **Edit**.
4. Move the desired fields to Selected Fields and make any other changes.
5. Save your changes.

Customise Compact Layouts

1. From Setup, click **Object Manager**, and then click the object that you want to update.
2. Click **Compact Layouts**, click the layout that you want to customise, and then click **Edit**.
3. Change the label, name, and fields, as needed.
4. Save your changes.

> **Tip**
> To ensure that product updates don't overwrite your changes, go to Clone Compact Layouts to Preserve Your Changes (EDA).

For more information on security and layout setup, go to Salesforce Help.

Add Custom Picklist Values

Understand how to customise fields and picklist values in EDA to meet the needs of your school.

Add Custom Fields and Picklist Values

Sometimes, you might want to add another option to an existing field.

For example, you might want to track Personal Email on the Preferred Email field, or Alternate Phone on the Preferred Email field. In those instances, first create a custom email or phone field. Then add the custom field's label as an option to the Preferred Email or Preferred Phone picklist.

Other times, you might want to use an existing but not preconfigured field as a picklist value for Preferred Email or Preferred Phone (for example, Assistant Phone). In this instance, just add the existing field label as a picklist option.

See Also:

Add or Edit Picklist Values

Create a Custom Field

Create a custom field to represent the additional information you want to capture.

For example, if you want to track a value for Personal Email in addition to the preconfigured values like University Email, Work Email, Alternate Email, and Preferred Email, complete these steps:

1. Click , then click **Setup**.
2. Click the Object Manager tab.
3. In the list of objects, click the object to which you want to add the field. For our example, we click **Contact**.
4. Click **Fields & Relationships**.
5. Click **New**.
6. Select the type of format that's right for the field you're adding. For our example, we choose Email.
7. Click **Next**.
8. Provide a label for the field and any other needed information, and click **Next**.
9. Specify the profiles who should have access to this field and click **Next**.
10. Select the page layouts you want to add the field to and click **Save**.

Add the Field Label as a Picklist Option

Use these steps to add a field label as a picklist option in EDA.

1. From **Setup**, click the Object Manager tab.

2. From the Contact details, click **Fields & Relationships**.
3. Click the name of the picklist field you want to add an option to.
4. In Values, click **New**.
5. Type the name of the new field. Make sure that the picklist value you provide matches the value you provided in Create a Custom Field exactly. Any mismatches can cause errors when saving the new field as the Contact's preferred value.
6. Click **Save**.

Now you'll see the new field as an option under the preferred value on a Contact record.

Position the New Field on Your Page Layouts

When the new field is added to a page layout, it might not be where you want it.

To position the new field on a page layout:

1. From **Setup**, click the **Object Manager** tab.
2. From the Contact details, click **Page Layouts**.
3. Select the page layout you want to manage.
4. Locate the new field and drag it to the location where you want it to appear. For our example, we find Personal Email in Contact Details, but we drag it to Contact Information, where other email addresses are located.
5. Click **Save**.

Add a Lookup Field to a Page Layout

Follow these steps to add a field that relates records through a lookup relationship to a page layout.

Add a Lookup Field to a Page Layout

If you want to add a field to a page layout, but don't see it listed in the palette, you need to create a lookup relationship so that the object can "look up" to a field on a related object. For example, if want to add a Language field to the Course Offering page layout so you can view the language a course is taught in, you'd create a lookup to Language.

Then you can include the related object's fields to your page layout.

1. Click , then click **Setup**.
2. Click the **Object Manager** tab.
3. In the list of objects, click the object you want to add the field to. For example, click **Course Offering** if you want to add a Language field for tracking the language a course

is taught in. Or click **Account** to add a Language field for tracking the languages used in a household.

4. Click **Fields & Relationships**.
5. Click **New**.
6. Select **Lookup Relationship** and click **Next**.
7. Select the related object (for example, Language if you want to add a Language field).
8. Click **Next**.
9. Enter a description and other details, as needed, and click **Next**.
10. Set appropriate field-level security and click **Next**.
11. Select the page layout that should include the new field, then click **Next**.
12. Verify that you want to add the related list to the object's page layout, and click **Save**. Otherwise, deselect **Add Related List** next to the page layout name, and click **Save**.

Use Related Lists

Show all the related information for your school in one place.

Use Related Lists to Show Related Records

One convenient feature of a CRM is that it can show all related information in one place, thanks to related lists. For example, from a student Contact's detail page, you can see the related Program Enrolments, Course Connections, Relationships, Attributes, and the many other details that tell the student's story. Depending on your org's settings, you may see related lists on a record either in the Related tab, or in the sidebar.

Technically, items in a related list are records with a lookup or master-detail relationship to another record. More practically speaking, a related list is just a section of a record detail page that lists all the items related to that record. When viewing a related list, you see only the related records you have permission to see. And if you have permission to create a new record from within a related list, such as a Course Connection in a British Literature Course Offering, you can do that without ever leaving the Contact detail page. For details about related lists, see Work with Related Lists on Records in Lightning Experience in Salesforce Help.

Add, Remove, or Edit Related Lists

Edit the page layout for an object to configure how related lists display for that object.

1. Click , then click **Setup**.
2. From Setup, click the **Object Manager** tab.

3. Click an object, for example, **Course**.
4. Click **Page Layouts**.
5. Click an page layout, for example, **HEDA Course Layout**.
6. Modify the related lists.
   - To add a related list, in the palette, click **Related Lists.** Drag a related list from the palette and drop it in the Related Lists section of the layout.
   - To edit a related list in the Related Lists section of the layout, click the Properties icon ( ) in the related list header. See Customise Related Lists in Salesforce Help for more information. Click **OK** when you're done.
   - To remove a related list, click the Remove Related List icon ( ) in the related list header.
7. Click **Save**.

Create Records from a Related List

Use these steps to create records from a related list in EDA.

1. From a record detail page, find the related list for the type of related record you want to create. For example, to create a Course Offering from a Course record, go to the Course Offerings related list.
2. Click **New**.
3. Enter the information for the new record.
4. Click **Save**.

Clone Compact Layouts To Preserve Your Changes (EDA)

Create a copy of Compact Layouts to protect your changes from automatic updates.

Clone Compact Layouts to Preserve Your Changes (EDA)

Understand the advantages of cloning a compact layout, and review an example.

The issue is that packaged Compact Layouts, unlike regular page layouts, get push upgraded whether you like it or not. This means that with any upgrades to NPSP , EDA , or other Salesforce products, Compact Layouts for Accounts, Contacts, and other objects get pushed to your organisation, overwriting any customisations you may have made. Which can lead to a lot of confusion, not to mention downright aggravation.

Here's a quick, three-step process to avoid this frustration:

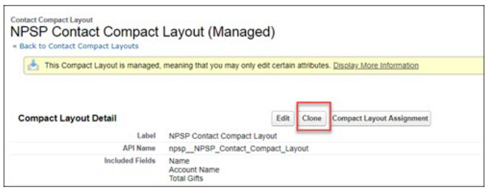
1. Clone the packaged Compact Layout.
2. Make changes to the cloned layout.

3. Set the cloned version as the primary Compact Layout.

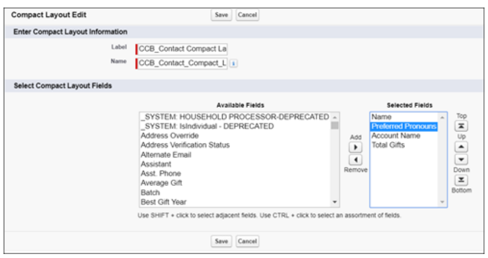
Let's walk through an example:

The staff at Colorado Community Bakery know that it's important to respect how their customers want to be addressed. They want to add a custom field, Preferred Pronouns, to their Compact Layout for Contacts, so that this information is front and centre.

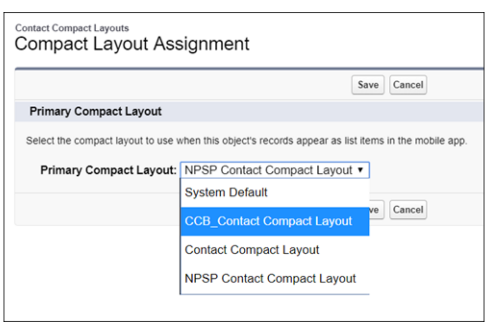
1. They start by cloning a packaged Compact Layout. (The screenshots below show NPSP Compact Layout screens, but the same process applies for EDA, Salesforce Advisor Link, V4S, or any other packaged Compact Layouts.)

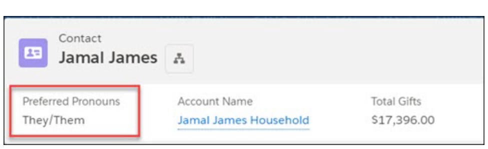


2. Next, they add their custom field to the cloned Compact Layout and click Save:



3. Finally, they set the new cloned Compact Layout as the primary Compact Layout:





Since they're using a cloned Compact Layout rather than a packaged Compact Layout, they can now be confident that their customisations will remain in place throughout any product upgrades.

EDA Integration Resources

Reference to software requirements specification.

EDA Software Requirements Specification

How to find EDA software requirements specification.

The EDA Software Requirements Specification is retired as of April 2020. Look to our product documentation instead.

EDA Product Information for GDPR

GDPR compliance resources for EDA.

EDA Product Information for GDPR

Learn about GDPR compliance resources for EDA.

Product Information for GDPR

Details about European Union (E.U.) General Data Protection Regulation (GDPR) compliance for Salesforce and Salesforce.org products including EDA .

The European Union (E.U.) General Data Protection Regulation (GDPR) was passed in 2016 with the intent of harmonizing European data protection laws into a single set of rules, while setting a new global gold standard for data protection and privacy. In effect on May 25, 2018, the GDPR is one of the most comprehensive and strictest regulations of its kind in the world.

At its core, the GDPR boils down to three key pillars:

- **Security**: Keep data safe and secure, and prevent unauthorised access or processing.
- **Accountability**: Require companies to be accountable and transparent in how they collect, process, and protect personal data.
- **Individual Rights**: Put control back into the hands of the individual to determine how their data is collected and used, such that companies are expected to process personal data on the individual’s terms.

If you process personal data related to your organisation's establishment within the European Union (E.U.), from or about persons within the E.U. or outside of the E.U. but where E.U. law applies, you may be subject to the GDPR. We advise you to consult with legal professionals to determine whether your company falls under GDPR requirements.

Salesforce has provided extensive information on its website with guidance to help accelerate your GDPR compliance journey within Salesforce, including for the Salesforce Platform, Sales Cloud, Service Cloud, Community Cloud, Marketing Cloud, Commerce Cloud, and Pardot.

Salesforce.org has similarly analysed our products built on the Salesforce Platform against GDPR requirements, identified and deployed enhancements, and generated documentation to help our customers meet their compliance objectives. As such, the following documentation is intended to supplement the guidance provided by Salesforce with use cases, examples, tips, and other considerations specific to our applications, including the Nonprofit Success Pack (NPSP), Volunteers for Salesforce (V4S), Education Data Architecture (EDA), and Student Success Hub (SSH).

As an important reminder, while the information provided here and from Salesforce is intended to help you navigate possible ways to meet your compliance needs, these are only guides and not determinative or guarantees of satisfying any legal rule. It is up to you to determine whether your use of the Salesforce Services or Salesforce.org applications is covered by, or compliant with, a law or regulation. We suggest you consult with a legal professional regarding your legal obligations.

Data Deletion

You may need to delete customer data in order to comply with data protection and privacy regulations, including the GDPR. We provide examples of common constituent requests, tips, and considerations that may help you determine how best to approach deletion requirements as they apply to your organisation. Data Deletion for Your Product.

Consent Management

The GDPR, as well as other data protection and privacy regulations, imposes requirements around obtaining, maintaining, and withdrawing consent, and other rights of subjects including objections to processing personal data. To help inform your approach to meeting these obligations, we provide examples of common constituent requests, tips, and other considerations. Don't forget to also check out the new Individual object from Salesforce for tracking privacy preferences within your organisation for Contacts, Leads, Person Accounts, and custom objects. Consent Management for Your Product.

Restriction of Processing

You may need to restrict or limit access and processing of data in order to comply with data protection and privacy regulations, including the GDPR. We provide examples on ways to restrict forms of data processing so you can make decisions on how best to comply with such requirements as they apply to your organisation. Restrict Data Processing.

Data Portability

The GDPR grants individuals in certain situations the right to get an export of their data. We provide examples of common requests and things to consider when evaluating your approach to data exports. Data Portability for Your Product.

Data Deletion for EDA

Develop an action plan for erasing data in EDA.

Data Deletion for Your Product

Learn about data deletion for EDA . Under various data protection and privacy regulations, you may be required to delete personal data of a constituent, such as in response to a GDPR right of erasure request. The following are examples of common requests, considerations, and related procedures to help you determine an action plan for complying with data erasure situations.

Not all deletion methods completely erase records from the database. Deleting a record may only move it to the Recycle Bin, and therefore personal data can still be accessed and restored. If you are required under a law or otherwise to ensure records are erased, be sure that you understand how record deletion works within Salesforce, and how to remove personal data from your instance in ways that meet your obligations.

We offer the following examples of common requests and considerations to help you plan how best to honour constituent requests around data deletion. These are only suggestions for your review, and not guaranteed steps for ensuring compliance with any legal rule.

Keep in mind that addressing constituent requests, including those provided for under the GDPR, can be challenging. A one-size-fits-all strategy may not always work, and you may need to adjust your approach when balancing organisational needs and legal obligations. For example, if exporting personal data to satisfy a GDPR data portability request may violate someone else's rights, you might consider narrowing the fields in scope rather than exporting all data. If deleting personal data to satisfy a GDPR erasure request may conflict with other requirements around record preservation, you might consider anonymising certain fields rather than wholesale deletion.

As always, there are pros and cons to each approach, including legal and business impacts and risks, and you are responsible for your own compliance obligations in your use of the Salesforce Services and Salesforce.org applications. You should work with your advisors, including legal counsel, to determine whether you are covered under a legal requirement, and come up with a compliance plan that's best for your organisation.

Salesforce resources:

- Data Deletion: Delete Personal Data
- Delete Records
- Recycle Bin
- Empty Specific Records out of the Recycle Bin
- Hard Delete Records
- Data Backup

Important
Remember to review both Salesforce Platform documentation AND Salesforce.org product-specific documentation. In addition to the information provided in the table below, review:

- Data Deletion for Sales Cloud
- Data Deletion for Salesforce Platform

<table>
<tr><th>Common Constituent Request</th><th>Actions to Consider</th><th>Things to Consider</th></tr>
<tr><td>A student has withdrawn from school and wants all of her data removed from the system.</td><td>Delete Records</td><td>Consider deleting these records and field data for your student:
• Contact
• Tasks
• Calendar events
• Personal data in unindexed, free-text fields
You can find personal data in unindexed fields by exporting the data, and then searching for the information.
You may also consider deleting:
• Course Connections
• Programme Enrolments
• Affiliations
• Relationships
• Cases
• Leads
• Notes
• Addresses
• Household Accounts
• Administrative Accounts
Be aware deleting certain student records could create conflicts with various requirements around data retention. If so, you may consider anonymising but should weigh all the options with a legal advisor.
If you maintain a Sandbox environment, you may want to refresh the environment afterward to remove that constituent's data from it, or log into the Sandbox and manually remove the data.</td></tr>
</table>

Common Constituent Request	Actions to Consider	Things to Consider
A faculty member has been fired and the university requests that you remove all of his personal data.	Delete Records Deactivate (Delete) Users	In addition to deleting the faculty member's Contact record, consider deleting: • Tasks • Calendar events • Personal data in unindexed, free-text fields You can find personal data in unindexed fields by exporting the data, and then searching for the information. If applicable, consider deactivating the faculty member's User account and remove any personal information stored on the User record. You may also consider deleting: • Addresses • Affiliations • Relationships • Course Offerings • Course Connections • Cases • Leads • Notes • Household Accounts • Administrative Accounts Be aware deleting certain student records could create conflicts with various requirements around data retention. If so, you may consider anonymising but should weigh all the options with a legal advisor. If you maintain a Sandbox environment, you may want to refresh the environment afterward to remove that constituent's data from it, or log into the Sandbox and manually remove the data.

Common Constituent Request	Actions to Consider	Things to Consider
A constituent doesn't want you to store her email address and phone number.	Manage Contacts Manage Accounts Manage Custom Objects	Consider deleting data in any fields that store your constituent's email address and phone number. NPSP also includes these custom email and phone fields and objects: • Alternate Email • University Email • Work Email • Work Phone • Address Object If you've created other records or activities related to your constituent, consider removing her email address and phone number from those records, and from Salesforce standard Email and Phone fields.

Consent Management for EDA

Learn how to manage consent and data privacy preferences in EDA.

Consent Management for Your Product

Learn about consent management for EDA . Various data protection and privacy laws, such as the GDPR, impose requirements around obtaining, maintaining, and withdrawing consent and otherwise honouring certain preferences of individuals in the processing of their personal information. We provide examples, considerations, and tips to help you determine ways to comply with constituent preferences around contact with, or from, your organisations.

When managing consent and certain other data privacy preferences, you may consider using Salesforce's new Individual object. The Individual object is neither pre-enabled in your system nor pre-configured to work with Salesforce.org applications, but you can enable and implement it using Salesforce customisation tools. Whether and how best to utilise the Individual object for your organisation is up to you. Salesforce.org will continue to evaluate the Individual object and how we may support it in future releases of our applications.

We offer the following examples of common requests and considerations to help you plan how best to honour constituent consent-related requests. These are only suggestions for your review, and not guaranteed steps for ensuring compliance with any legal rule.

Keep in mind that addressing constituent requests, including those provided for under the GDPR, can be challenging. A one-size-fits-all strategy may not always work, and you may need to adjust your approach when balancing organisational needs and legal obligations.

For example, if exporting personal data to satisfy a GDPR data portability request may violate someone else's rights, you might consider narrowing the fields in scope rather than exporting all data. If deleting personal data to satisfy a GDPR erasure request may conflict with other requirements around record preservation, you might consider anonymising certain fields rather than wholesale deletion.

As always, there are pros and cons to each approach, including legal and business impacts and risks, and you are responsible for your own compliance obligations in your use of the Salesforce Services and Salesforce.org applications. You should work with your advisors, including legal counsel, to determine whether you are covered under a legal requirement, and come up with a compliance plan that's best for your organisation.

Salesforce resources:

- Store Customers' Data Privacy Preferences
- Consent Management: Track Customer Consent
- Enable Tracking and Storage of Certain Data Privacy Preferences
- Best Practices for Tracking Data Privacy
- Consent Management for Marketing Cloud
- Consent Management for Pardot

> **Important**
> Remember to review both Salesforce Platform documentation AND Salesforce.org product-specific documentation. In addition to the information in this table, review:
>
> - Consent Management for Sales Cloud
> - Consent Management for Salesforce Platform

Common Constituent Request	Actions to Consider	Things to Consider
A student doesn't want to receive informal or non-business related calls, emails or post from your organisation.	Manage Contacts Manage Leads Delete Records	You may consider deleting information in these Contact or Lead fields: • Phone • Home Phone • Other Phone • Mobile • Email • Postal Address • Other Address EDA also includes these custom email and phone fields and objects: • Alternate Email • University Email • Work Email • Work Phone • Address Object For Contacts and Leads, consider these options: • Email Opt Out • Do Not Call • Do Not Contact
Some of your students don't want to hear from your organisation, unless they specifically opt in.	Manage Contacts Manage Leads Delete Records	For Contacts and Leads, consider these options: • Email Opt Out • Do Not Call • Do Not Contact Consider deleting phone numbers, email addresses, and mailing addresses, unless your constituents give you consent to use them. Refrain from sending marketing materials.

Restrict Data Processing for EDA

Learn how to manage restrictions on data processing in EDA.

Restrict Data Processing

To comply with certain data protection and privacy regulations, you may be required to restrict certain of your constituents' data within Salesforce, including for EDA.

We offer the following examples of common requests and considerations to help you plan how best to honour constituent requests around restrictions of data processing. These are only suggestions for your review, and not guaranteed steps for ensuring compliance with any legal rule.

Keep in mind that addressing constituent requests, including those provided for under the GDPR, can be challenging. A one-size-fits-all strategy may not always work, and you may need to adjust your approach when balancing organisational needs and legal obligations. For example, if exporting personal data to satisfy a GDPR data portability request may violate someone else's rights, you might consider narrowing the fields in scope rather than exporting all data. If deleting personal data to satisfy a GDPR erasure request may conflict with other requirements around record preservation, you might consider anonymising certain fields rather than wholesale deletion.

As always, there are pros and cons to each approach, including legal and business impacts and risks, and you are responsible for your own compliance obligations in your use of the Salesforce Services and Salesforce.org applications. You should work with your advisors, including legal counsel, to determine whether you are covered under a legal requirement, and come up with a compliance plan that's best for your organisation.

Salesforce resources:

- Restriction of Processing: Restrict How to Process Personal Data
- Export Backup Data
- Export results of SOQL query from workbench
- Export Data with Data Loader

Important
Remember to review both Salesforce Platform documentation AND Salesforce.org product-specific documentation. In addition to the information in this table, review:

- Restrict Data Processing for Sales Cloud
- Restrict Data Processing for Salesforce Platform

Common Constituent Request	Actions to Consider	Things to Consider
A constituent has reported that the personal data you have on file for her is inaccurate. Because of those errors, she wants you to stop processing her data until you've verified the data's accuracy.	Export Data	Export the constituent's data to retain it. Then, delete her data from Salesforce. Work with your constituent to verify the data's accuracy. Then, get her approval to resume processing her data.
A student has been suspended and the school no longer needs his data. However, he asked that you keep his data because he's involved in a legal proceeding that might require the data but does not want you to process the data.	Export Data	Export the student's data to retain it. Then, delete his data from Salesforce.

Data Portability for EDA

Understand how to comply with legal data portability and export requirements in EDA.

Data Portability for Your Product

Learn about data portability for EDA . When your constituents request it, prepare and pack up the data you've received from them so that you can work toward complying with GDPR data portability and export requirements. We offer the following examples of common requests and considerations to help you plan how best to honour constituent requests around data portability. These are only suggestions for your review, and not guaranteed steps for ensuring compliance with any legal rule.

Keep in mind that addressing constituent requests, including those provided for under the GDPR, can be challenging. A one-size-fits-all strategy may not always work, and you may need to adjust your approach when balancing organisational needs and legal obligations. For example, if exporting personal data to satisfy a GDPR data portability request may violate someone else's rights, you might consider narrowing the fields in scope rather than exporting all data. If deleting personal data to satisfy a GDPR erasure request may conflict with other requirements around record preservation, you might consider anonymising certain fields rather than wholesale deletion.

As always, there are pros and cons to each approach, including legal and business impacts and risks, and you are responsible for your own compliance obligations in your use of the Salesforce Services and Salesforce.org applications. You should work with your advisors, including legal counsel, to determine whether you are covered under a legal requirement, and come up with a compliance plan that's best for your organisation.

Salesforce resources:

- Data Portability: Give Customers Their Data when They Want It

- Export Backup Data
- Export results of SOQL query from workbench
- Export Data with Data Loader

Important

Remember to review both Salesforce Platform documentation AND Salesforce.org product-specific documentation. In addition to the information in this table, review:

- Data Export for Sales Cloud
- Data Export for Salesforce Platform

Common Constituent Request	Actions to Consider	Things to Consider
A student is moving out of state and won't be attending your university anymore. He wants to take his information with him.	Export Data	Personal data can exist in many different records and fields. Consider exporting these records and fields for your student: • Contact • Tasks • Calendar events • Personal data in unindexed, free-text fields You can find personal data in unindexed fields by exporting the data, and then searching for the information. You may also consider exporting: • Cases • Leads • Notes • Addresses • Affiliations • Relationships • Household Accounts • Administrative Accounts • Course Connections • Programme Enrolments The export file should be in a structured, commonly used, machine-readable format that is transferable such as a .csv. And if that person no longer wants you to keep the personal data you've collected, you can delete it.

Common Constituent Request	Actions to Consider	Things to Consider
A faculty member is being assigned to a new position. She asked for the personal data you collected from her.	Export Data	Personal data can exist in many different records and fields. Consider exporting these records and fields for the faculty member: • Contact • Tasks • Calendar events • Personal data in unindexed, free-text fields You can find personal data in unindexed fields by exporting the data, and then searching for the information. You may also consider exporting: • Cases • Leads • Affiliations • Relationships • Notes • Addresses • Household Accounts • Administrative Accounts • Course Offerings • Course Connections The export file should be in a structured, commonly used, machine-readable format that is transferable such as a .csv. And if that person no longer wants you to keep the personal data you've collected, you can delete it.

For Developers

The Education Data Architecture (EDA) is an open source, BSD-licensed package.

Developer contributions and involvement are welcomed and encouraged. All packages and source are currently hosted on GitHub using git. Branches as well as tags, issues lists, and release notes can be found in the EDA repository.