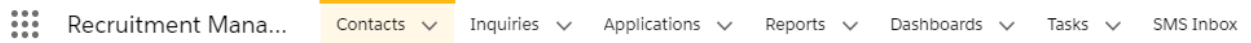
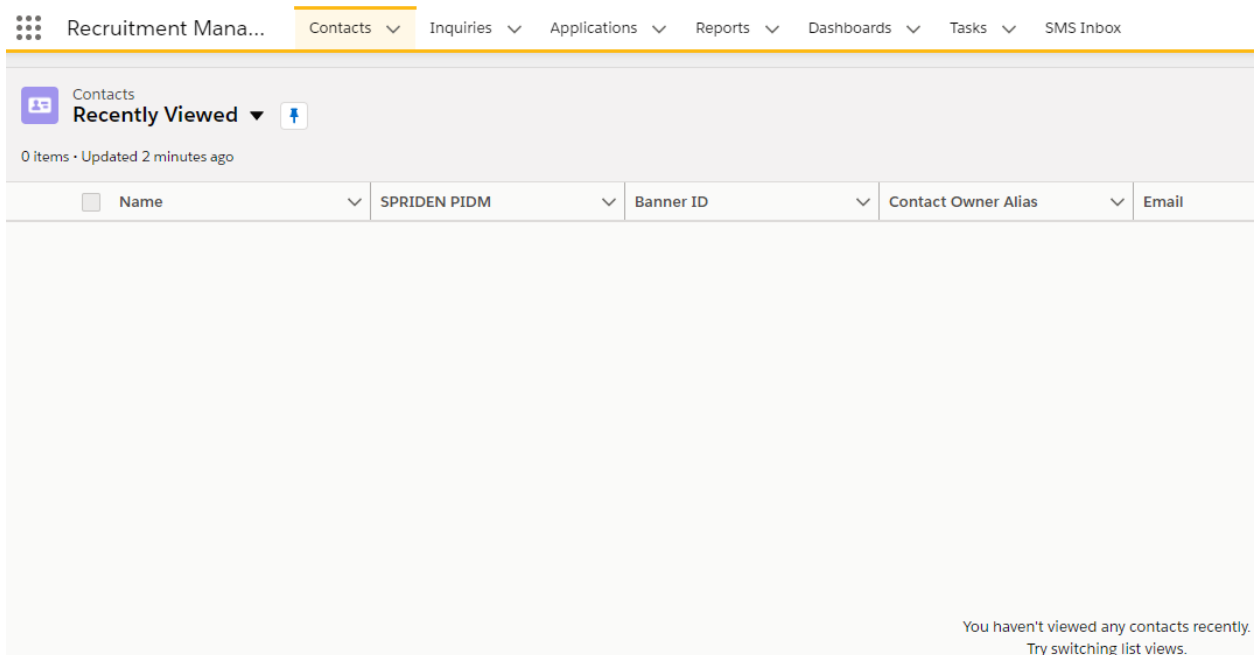


How to Locate a Contact (Applicant) and View an Application in Target X (Production Environment)

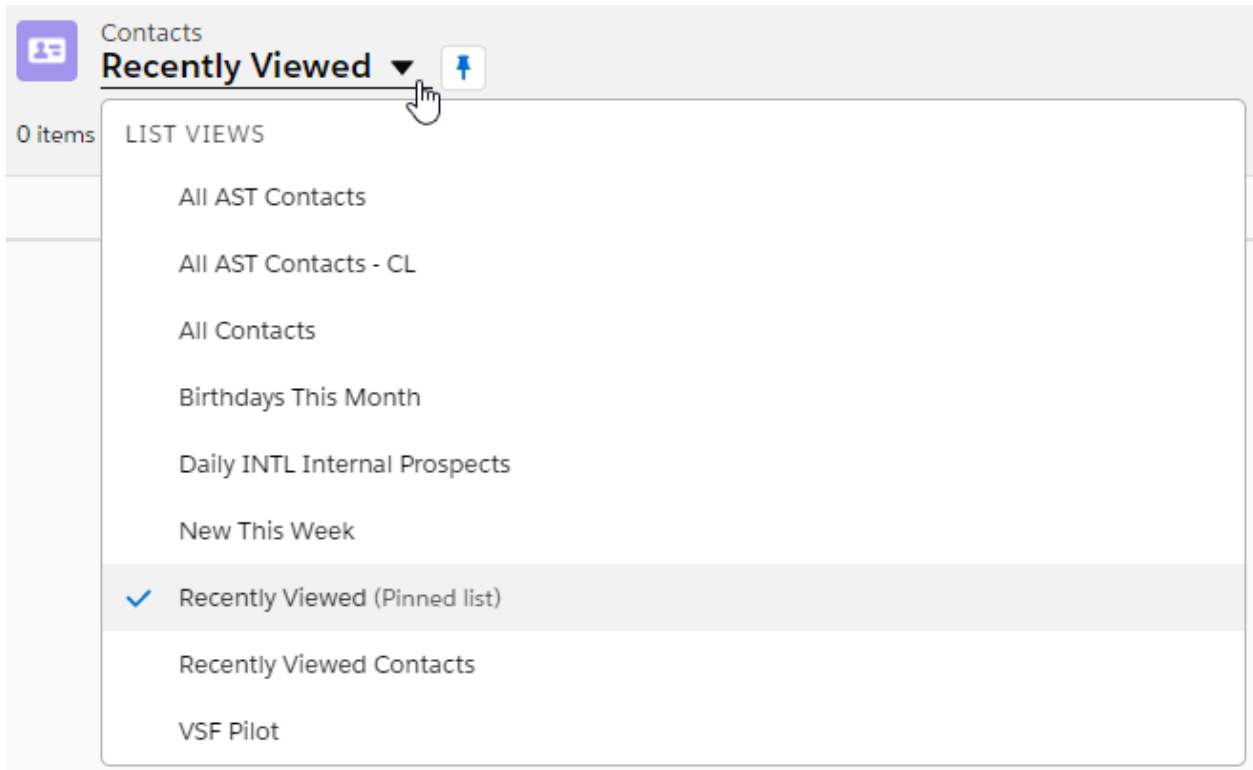
1. Go to the [Target X CRM \(https://valenciacollege.lightning.force.com/lightning/page/home\)](https://valenciacollege.lightning.force.com/lightning/page/home).
2. To locate a Contact (Prospect or Applicant) in Target X, click on Contacts on the upper tab menu:



3. You may not see any data when you click on Contacts; this is because your default Contacts view may be **Recently Viewed**:



4. To change the Contacts view, click on the drop-down arrow next to Recently Viewed and select the view you wish to see:



5. In this example, I selected **All Contacts** as the view (this will allow you to see all contact types):

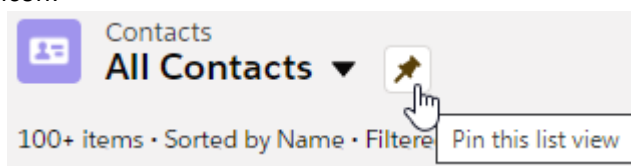
Contacts
All Contacts

100+ items • Sorted by Name • Filtered by All contacts • Updated a few seconds ago

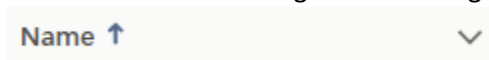
Search this list...

	Name ↑	Created Date	Gen...	Banner ID	Radius ID	SR...	Email	Alt Email	Con...	Last Data Input Source	Antl...	Antl...
1	<input type="checkbox"/> Aalia Khaubouli	12/13/2020, 2:11 PM			746000004869620				mccanc	Radius Load Dec 11		
2	<input type="checkbox"/> Aakarsha Tagore	12/13/2020, 2:09 PM			7460000033517909				ttail	Radius Load Dec 11		
3	<input type="checkbox"/> Abderrahim Erreyahy	12/13/2020, 2:11 PM			746000004869656				mccanc	Radius Load Dec 11		
4	<input type="checkbox"/> AbduBasher yari	12/13/2020, 2:09 PM			746000003517737				ttail	Radius Load Dec 11		
5	<input type="checkbox"/> Abeba Bade	12/13/2020, 2:09 PM			746000003517953				ttail	Radius Load Dec 11		
6	<input type="checkbox"/> Abhinav Awasthi	12/13/2020, 2:08 PM			746000003517625				ttail	Radius Load Dec 11		
7	<input type="checkbox"/> Aalayna Jacynn Lattin	1/3/2021, 10:02 PM	Female	V03766799			alattin@mail.valenciacollege.edu	laynalattin@gmail.com	mtoni			

a. If you would like to always see All Contacts, you can pin that view by clicking on the icon:



6. You can sort in ascending or descending order by clicking on the Column name:



7. Instead of scrolling through the list of names, you can perform a search (by contact name or contact email address):

- a. Click inside the Search bar located at the top of the screen and enter the contact's name or email address:

- b. As you begin typing, a list will begin to appear; click on the name to select it:

8. After locating and selecting the Contact, click on their name (or email address if you searched by email address) and their Contact record will open:

Contact
Olive Student

Contact Owner: TargetX Integration | Level: Credit | Student Type: First Time In College

Progress: Applicant (selected) | Deposited | Withdrawn | Enrolled | Mark Student Stage as Complete

Details | Related | Pardot Engagement History

Contact Owner	TargetX Integration	SPRIDEN PIDM	
Name	Olive Student	Banner ID	
Preferred First Name		Preferred Email	
Personal Pronoun		Email	olive@mailinator.com
Former Last Name		Alt Email	
Social Security Number		Email Opt Out	
Military Status	No Military History	Preferred Phone	Mobile
FDLE Sex Offender	No	Home Phone	
Group Assignment Override		Mobile	(407) 582-5000
		Okay to text?	<input checked="" type="checkbox"/>
		Country Code	
		International Phone	

We found no potential duplicates of this contact.

Application

Applications (1)

0000018408
Application Submit Da... 2/15/2021
Program: A.S. Criminal Justice
Concentration: Homeland Security
[View All](#)

Inquiries

Essay

Test

Enrollment History

Recommendations

Holds

Affiliations

- a. The bar at the top indicates what stage the Contact is in; the different stages are (please note that you may not have access to this feature, depending on your CRM access):

- i. Lead
 - ii. Inquiry
 - iii. Applicant
 - iv. Deposited (we do not use this)
 - v. Withdrawn
 - vi. Enrolled
- b. Use the scroll bar on the far right to scroll through the page and view the person's entire Contact Record
 - c. You can view the Contact's Details (default view), Related (shows the Contact History, Campaign History, Event History, etc. for the Contact), and Pardot Engagement History (this is currently not enabled in the Training environment; it will show the communications to the Contact sent from Pardot)
9. You can tell if the Contact has applied for admission if there is a number next to the word Application on the right side of the page. Click on View All under Applications (1) to view the contact's/applicant's Application for Admission or, click on the application number (i.e. 000018408). If an applicant has multiple applications, you will see the last three submitted applications listed here; if they have more than 3 applications, you must click on View All to see them all):

Application

Applications (1)

[0000018408](#)

Application Submit Da... 2/15/2021

Program: A.S. Criminal Justice

Concentration: Homeland Security

[View All](#)

- a. If you clicked on View All, you will see:

Contacts > Olive Student

Applications

1 Item - Sorted by Application Number - Updated a few seconds ago

Application Number	Application Subm...	Program	Concentration	Start Term and Year	Application Stage	Application Status	Level	Application D...	Application Form Name
1	0000018408	2/15/2021	A.S. Criminal Justice	Homeland Security	Summer 2021	Submitted	Incomplete	Credit	Domestic Credit Application

- b. Click on the Application Number shown to the left of the application you wish to view:

Application Number ↓

1 0000018408

10. The application will open; use the scroll bar on the far right of the screen to scroll through the application:

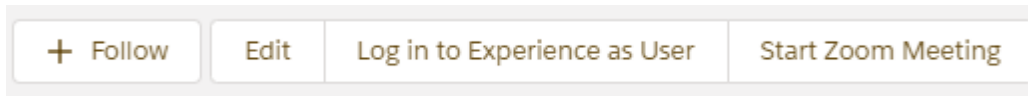
The screenshot shows a web interface for an application. At the top, it displays the application number 000018408 and the student name Olive Student. Below this, there are tabs for 'Details' and 'Related'. The 'Details' tab is active, showing 'Application Information' with fields for Application Form Name (Domestic Credit Application), Application Number (000018408), Student (Olive Student), Application Stage (Submitted), Percent Complete (100), True and Correct (checked), Electronic Signature (Olive Student), and Agent Name. To the right, there are fields for Application Status (Incomplete), Start Date (2/15/2021), Application Submit Date (2/15/2021), Review Status, Application Decision, Decision Date, Admit Date, Registration Date, Last Data Input Source, Created By (Olive Student, 2/15/2021, 4:15 PM), and Last Modified By (Olive Student, 2/15/2021, 4:19 PM). On the far right, there are sections for 'Essay' (0), 'Test', 'Enrollment History', 'Recommendations', and 'Activity'. The 'Activity' section shows a 'New Task' button and a 'Log a Call' button, with a filter set to 'All time - All activities - All types'.

11. You can view more details for the Contact/Applicant by looking on the right side of the page (note that some information will not be available until we have received transcripts or test scores or until after a decision code has been assigned to the student):

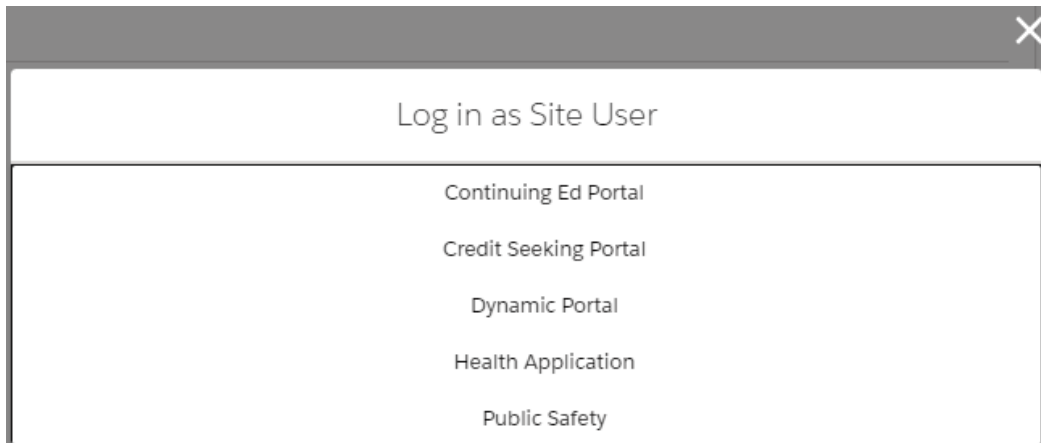
The screenshot shows a sidebar navigation menu on the left with options: Inquiries, Essay, Test, Enrollment History, Recommendations, and Holds. The main content area is titled 'Application' and shows a list of applications. The first application is for student 000018775, submitted on 3/18/2021, for the Accounting program. Below the application list is a 'View All' link.

12. You can see an Applicant's application (in-progress or completed) by using the **Log in to Experience as User** feature

a. From the Contact page, look in the upper right to find the Log in to Experience as User link:



- b. Select the site you wish to log in to as the user—typically you will be looking up Credit Seeking students so in this example I have selected Credit Seeking Portal (note: you may not have access to all of the sites listed in the screenshot):



- c. You will be re-directed to the appropriate portal you have selected and will be viewing it as though you are the Contact/Applicant.
- d. Use the browser's back arrow to navigate back to the CRM (screenshot shows this in Chrome):

