

GET

STARTED

EDUCATION DATA ARCHITECTURE

A workbook to guide your EDA implementation



Introduction

By now you may have read about [Salesforce.org Education Cloud](#) and possibly even completed the Trailhead [Education Cloud trails](#). You've learned that Education Cloud is a CRM based set of solutions and purpose built products that enables institutions to create 360-degree views across the entire educational journey and you're interested in implementing it for your own institution. The next question is: how do I get started?

Education Data Architecture (EDA) is the foundation of Education Cloud. Developed in collaboration with our education partners and customer community, EDA is a flexible data architecture designed to configure Salesforce for education.

So, what exactly do we mean by "data architecture?" Basically, we're talking about a series of industry standard objects built on the Salesforce Platform that model student relationships as well as affiliations to courses, extracurricular activities, and more. With EDA, institutions can leverage a common language and configuration across the entire learner lifecycle without having to spend resources customizing Salesforce for education. It also includes early warning management including attendance, term grades, prospective employers, and more.

Chances are that you've been using another application (or maybe even several applications) to keep track of your student data and you're wondering if you should still keep those systems around or migrate everything over. Or your institution may even already be using Salesforce for other purposes and you're wondering if it makes sense to install EDA into an existing org or if it makes sense to stand up a new one.

While the answers to questions like the ones above will vary from institution to institution based on individual use cases, this workbook will help guide you through the elements that make up EDA and provide information that helps you make key decisions necessary during an Education Cloud implementation.

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A NOTE ON K-12 ARCHITECTURE KIT

K-12 Architecture Kit is the foundation for schools and districts to connect people, processes, and data. Built directly on EDA, K-12 Architecture Kit gives you access to not only the functionalities in EDA, but also pre-built objects, page layouts, and customizable reports and dashboards that address the common challenges experienced in K-12 schools and districts. Since this workbook focuses on EDA as it relates to higher education institutions, we invite K-12 customers to use these resources for a deeper dive into K-12 Architecture Kit.

- Product Documentation: [K-12 Architecture Documentation](#)
- Trailhead: [Administer Salesforce for K-12 Educational Institutions](#)
- Website: [K-12 Architecture Kit](#)
- Webinar: [Get Started with K-12 Architecture Kit](#)
- Webinar: [K-12 Architecture Kit Deep Dive](#)
- Try for Free: [K-12 Architecture Kit Trial](#)

Five Steps to Plan and Implement EDA

Use this step-by-step checklist to support your EDA implementation.

STEP 1

Deepen your Understanding of EDA and Account Model

- Read the [EDA Documentation](#) in the Power of Us Hub
- Complete the [Administer Education Data Architecture \(EDA\)](#) trail on Trailhead
- Read the [Understand the EDA Data Model](#) section of this workbook
- Review the [When Not to use EDA](#) and [Common Implementation Scenarios](#) sections of this workbook

STEP 2

Plan Your Integration Strategy

- Download and review the [Build an Integration Strategy](#) e-book
- Revisit the [Recommended Data Import Sequence for EDA](#) in EDA's documentation in the Power of Us Hub
- Review the [Common Integration Points](#) section of this workbook

STEP 3

Map Your Existing Data to EDA Objects

- Download the [Map EDA Objects with Your Existing Data](#) as a .csv or Excel file
- Decide which objects you need in your architecture and what existing data (if any) to map to those objects

STEP 4

Install EDA

- Watch the video on [How to Install the Education Data Architecture](#) or review the steps in the [EDA Documentation](#) in the Power of Us Hub
- Sign up for an EDA trial if you don't want to install EDA into an existing Sandbox or Developer org
- Implement your integration strategy or import your data manually

STEP 5

Customize EDA

- Explore the [Common Customizations](#) section of this workbook
- Examine options for [Salesforce Configuration Basics](#) in EDA's documentation in the Power of Us Hub
- Discover how to extend EDA with Salesforce AppExchange by reading the [EDA Readiness Initiative](#) section in this workbook

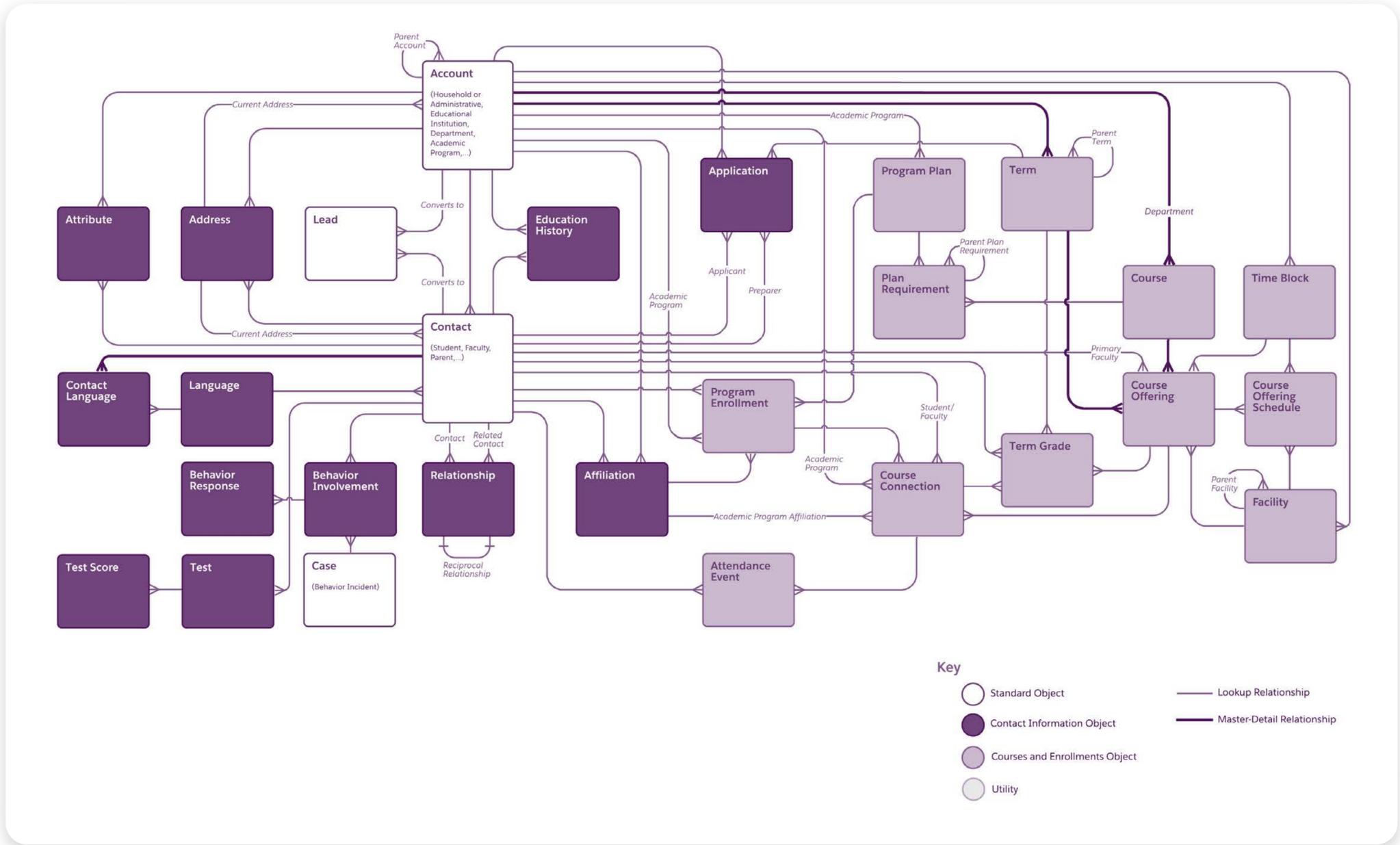
LOOKING FOR MORE INFORMATION?

Visit the [Final Steps](#) and [Additional Resources](#) sections of this workbook.

Considerations Before Implementation

Understand the EDA Data Model

Any design decisions that you make during the planning stage of your implementation should start with a thorough understanding of the EDA data model and what its objects are most commonly used for. While you can create additional custom objects to enhance this model, you should try to fully utilize as many of the existing objects as are relevant for your institution. This is critical to take full advantage Education Cloud functionality, especially if you're planning to migrate data from one or more legacy applications. Also, Salesforce.org product innovations are built on EDA, so sticking to the data model as closely as possible will make it easier to take advantage of new tools and features as they get added to the application.



It's also worth noting that you don't necessarily have to use every object in the data model. Some are required, such as Accounts and Contacts, but others are optional and may not be useful at your specific institution. If there are objects that don't fit in with your processes, you can either choose to ignore them or adjust their visibility to hide them completely. This is your architecture to build!

The next few pages contain a list of EDA objects along with the data they're associated with and an overview of when you may or may not want to use them.

View the most current version of the EDA Data Model [here](#), and the most current version of the K-12 Architecture Kit Data Model [here](#).

EDA Object Overview

For a current listing of all of our product-specific objects, check out the [EDA Data Dictionary](#) and [K-12 Architecture Kit Data Dictionary](#).

ACCOUNT

An entity associated with one or more individual Contacts in your EDA org. An Account is typically used to represent major areas of study and can also represent groups and organizations, both internal and external to your institution.

- Sometimes used to track minor areas of study, corporate partnerships and athletic affiliations. Can also be used to store student groups and other types of records in an integrated Student Information System.
- Populate with data related to organizations and households.
- Do not populate with data related to facilities. Use the Facility object instead. However, if the facility is owned by a third party and you need to store the owner's contact information for communication purposes, you can use Account records.

ADDRESS

Address information for an Account or Contact. Allows for multiple and seasonal addresses.

- Populate with data related to mailing, billing or other addresses, including seasonal addresses (on-campus, off-campus, etc.).

APPLICATION

Track information about a prospective student's application to your institution, from submittal through decision.

- Populate with information about a prospective student's application to your institution, from submittal through decision.
- Do not populate with relationships between contacts. Use the Relationship object instead.
- You may not want to use this object at all if you're using a third-party recruiting and admissions tool.

AFFILIATION

The relationship between a Contact and an Organization.

- Sometimes used to track education history by setting up prior educational institutions or programs of study as Accounts and relating Contacts to them.
- Populate with many-to-many relationships between Accounts and Contacts.

ATTENDANCE EVENT

Stores information about a student's attendance.

- Populate with attendance data.
- You may not want to use this object at all if attendance is not mandatory at your institution or not tracked in the CRM.

ATTRIBUTE

A characteristic of or a credential held by the associated Contact. For example, an Attribute record with a Credential record type can indicate that a faculty member has a Multiple Subject Teaching Credential.

- This is similar to a name/value pair list that allows additional values associated with a Contact to be defined and populated with data without requiring their own separate fields.

BEHAVIOR INVOLVEMENT

Stores information about the people involved in a Case that represents a behavior event.

- Populate with behavior-related data that needs to be referred to or reported on later.
- Tracking behavior issues is optional in EDA.

BEHAVIOR RESPONSE

Stores information about the response to a behavior event.

- Populate with faculty and staff responses to behavior-related data.
- Tracking behavior issues is optional in EDA.

EDA Object Overview

CASE

Track constituent's questions, feedback, or issues. Data can be populated directly in Salesforce by an internal employee, and if you'd like to provide self-service options for students or faculty, you can use [Web-To-Case](#) or [Email-to-Case](#).

- If you're using SAL, Cases are also used to track interactions between students and advisors.
- Cases are "containers" for a variety of different service and advisory related information.
- Tracking behavior issues is optional in EDA.

CONTACT

A student, faculty member, alumni, or other person related to the educational institution.

- Can also be used to track behavior events and related Behavior Involvement records.
- Populate with data related to individuals.

CONTACT LANGUAGE

Joins a Language and a Contact to store details about a Contact's language fluency.

- Populate with many-to-many relationships between Contacts and Languages.
- Tracking Contact Languages is Optional in EDA.

COURSE

Academic course offered by a Department or School (the degree-granting Account entity at your institution).

- Populate with high level course information (i.e. "Computer Science 101: Introduction to Programming").
- Do not populate with specific instances of a course (i.e. "Computer Science 101: Introduction to Programming, Spring 2021"). Use the Course Offering Object for this information.

COURSE CONNECTION

Connection between a Contact (either a student or faculty) and a Course Offering (specific occurrence of a Course). Also contains information such as the Course Grade and the Contact's Academic Program (if applicable).

- Populate with many-to-many relationships between Course Offerings and associated Contacts, plus the role that Contact will play in the Course (e.g. Dr. Thomas Leddy, Faculty Member; Sara Elizabeth, Student).

COURSE OFFERING

Joins a Course and a Term to store information about a specific occurrence of a Course.

- Populate with individual course instances (e.g. Computer Science 101: Introduction to Programming/ Spring Semester, Offering A).

COURSE OFFERING SCHEDULE

Joins Course Offering to Time Block and provides a way to specify the days and location for a Course.

- Populate with relationships between course offerings and time blocks.
- Do not populate with data about the schedule itself (use the Time Block Object).

FACILITY

The location of a class or other property asset. Can be helpful when scheduling classes or other school activities.

- While Facilities are traditionally used to store course locations, they can also be used for student housing (requires an additional junction object between Facilities and Contacts - see the common customizations noted later in this workbook).
- Populate with a hierarchy of locations (example: a building is a parent facility and an individual lecture hall within that building is a child facility).

EDA Object Overview

LANGUAGE

Stores language information.

- Populate with a list of languages your students, staff and faculty members may speak.

Tracking contact languages is optional in EDA.

LEAD

Represents a prospect or lead. Leads are part of the core Salesforce data model, not the standard EDA model; however, they're listed here because they still have common use cases within educational institutions.

- Can be a prospective student and/or a prospective business partner or sponsor depending on your processes.
- Populate with "suspects" who you don't have enough data about to store as fully fledged contacts yet (the point at which you convert them is a business decision that may vary based on the specific data you're trying to track).
- You may not want to use this object at all if you're using a third-party recruiting and admissions solution that uses its own objects to handle this data.

OPPORTUNITY

Represents a transaction involving potential revenue, such as a donation, grant or possible sponsorship.

Opportunities are part of the core Salesforce data model, not the standard EDA model; however, they're listed here because they still have common use cases within educational institutions.

- Can also represent a prospective student or other opportunity with an associated value.
- Populate with transactional data that may eventually result in the creation of revenue for the institution.
- You may not want to use this object at all if you're using a third-party recruiting and admissions solution that uses its own objects to handle this data.

PLAN REQUIREMENT

The various course requirements for completing a Program Plan.

- Populate with relationships between courses and the degrees or certificates they're associated with.

PROGRAM ENROLLMENT

A student Contact's enrollment in an academic program offered by a Department or School (the degree-granting Account entity at your institution).

- Populate with relationships between the students and the programs they're enrolled in.

PROGRAM PLAN

Links Courses to an Academic Program to create a path for students to follow. An Academic Program can list multiple Courses, and a Course can be associated with multiple Academic Programs.

- Populate with data about requirements to earn a degree or certificate, or to complete an academic program.

RELATIONSHIP

The relationship between two Contacts.

- Populate with relationship and reciprocal relationship information between contacts.
- Do not populate with information about relationships between Contacts and Accounts. Use the Affiliation object instead.

TERM

A period of the academic year when your institution is in session. For example, semester, trimester, or quarter.

- Populate with term information (i.e. Fall 2020, Spring 2021, etc.). Can be any length of time.

EDA Object Overview

TERM GRADE

Stores student grades for a specific grading period within a Term.

- Populate numeric, letter, and percentage grades.
- Note that the grade field on the Course Connection Object is only numeric, so adjust accordingly if you're using other formats.
- You may not want to use this object at all if term grades are only tracked in your Student Information System.

TEST

An instance of a student taking a test.

- Populate with many-to-many relationships between students and tests.
- You may not want to use this object at all if tests and test scores are only tracked in your Student Information System.

TEST SCORE

The score on a section of a specific test or a composite score.

- Populate with numeric grades.
- You may not want to use this object at all if tests and test scores are only tracked in your Student Information System.

TIME BLOCK

The specific Time Block associated with this Course Offering.

- Populate with a specific block of time, as it relates to a course offering schedule (i.e. Tuesdays from 9-11am and Thursdays from 10am-12pm).
- Only use Time Block on a Course Offering if you don't expect to use the Course Offering Schedule object, which tracks the same kind of data. Use one or the other, not both.

You may not want to use this object if time is tracked with Course Offering Schedules.

TRIGGER HANDLER

Stores which classes to run, in what order, and for which users, in response to DML performed on an object.

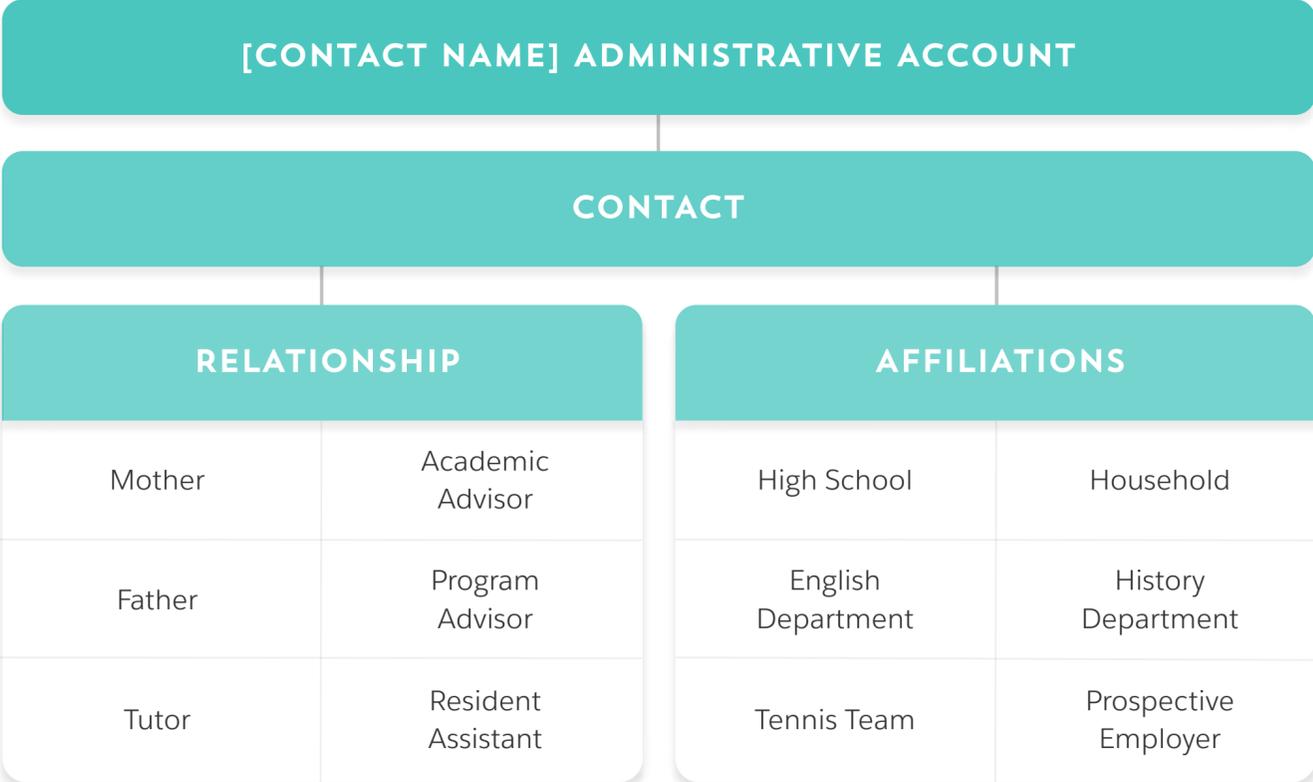
Class execution can also be controlled using the Filter Field and Filter Value fields.

- Comes pre-populated with standard EDA triggers. Custom triggers can be added.
- Assess which triggers can be disabled during data migrations.

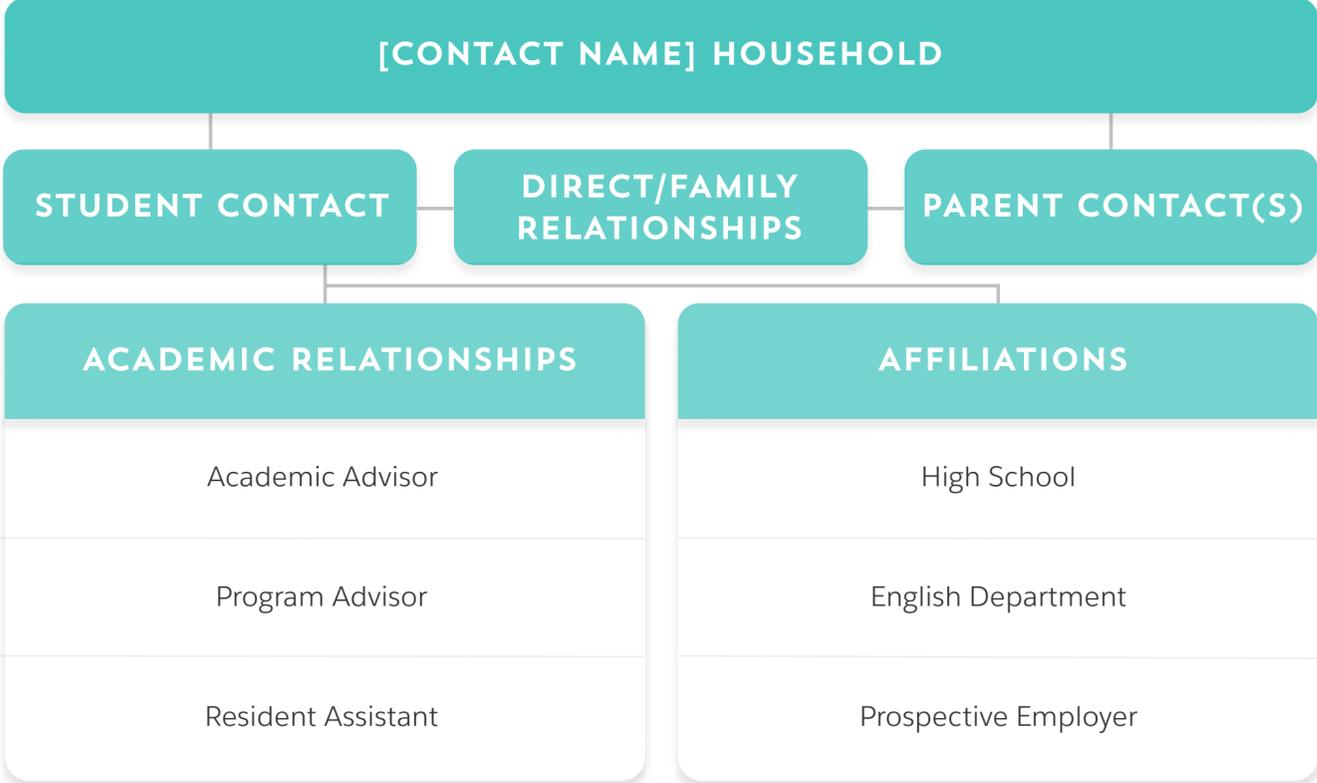
EDA Account Models

Deciding which account model you are going to use within EDA is a vital first decision when designing or building out an EDA org as it is the cornerstone of the data architecture. In the EDA account model, every student is a Contact and has an associated container Account. EDA offers two kinds of container Accounts, Administrative and Household.

The Administrative Account model is the default account model in EDA. You can think of an Administrative Account as the Account-level representation of a Contact. It's a 1-to-1 relationship between the two, which fulfills the Salesforce data model requirement that every Contact has an associated Account.



The Household Account model is designed to represent the household a student Contact belongs to. Instead of 1-to-1 relationships between accounts and contacts, a Household Account can contain relationships with multiple Contacts besides the student, such as parents or guardians, siblings, and other members of a shared household. The Household model also allows address record tracking for the entire Household.



There are pros and cons to each account model, so make sure to think through your processes before choosing. It's also worth noting that it's possible to use different models at different points of the student lifecycle. It may make sense to use Administrative Accounts to support processes related to recruiting, admissions, and actively enrolled students and then convert your student Contacts to a Household Account model when they become alumni.

Deciding on which account model to use (or to use both) depends on many factors, but rest assured there is no wrong approach. For example, some institutions select the Administrative Account model because they find it more straightforward and easy to manage- one account for each contact. Other institutions choose the Household Account model because of the ability to track multiple contacts together in one account- think managing household addresses and shared donation credits. Others use a combination approach such as using an Administrative Account for the student, placing family contacts (parents, siblings, etc.) in a Household Account, and associating the student to that household using Affiliations or Relationships.

So how do you decide? Start by thinking about your goals for using Salesforce at your institution.

- Do you want the student to be at the center of your data model? *Administrative Account*
- Do you want the ability to group contacts and manage their data (such as addresses) as a unit? *Household Account*
- Can you envision a use-case for both account models? *Administrative Account and Household Account (one must be the primary account model)*

	ADMINISTRATIVE	HOUSEHOLD
Default Model	✓	
Simpler Account Level Maintenance	✓	
Supports Multiple Contacts per Account		✓
Supports Household Address Record Tracking		✓

If you still need help deciding, there are resources listed in the Final Steps section at the end of this workbook. Support is available if you need it!

When Not to Use EDA

While EDA helps institutions automate their student lifecycle related processes, there are still some scenarios where Salesforce may be a good fit for an institution (or a department within an institution), but EDA is not a good fit. These scenarios generally fall into three categories:

1. Process Driven Scenarios

You map out your processes and realize that would need to customize EDA so much in order to automate them that the end result would look nothing like the standard delivered version... and your processes can't be changed. Any type of transformational activity that involves implementing a new system and doing a big data migration is going to require some associated process changes that may make users a bit uncomfortable at first. The question you'll want to ask yourself is whether your current processes truly can't be changed or if an Organizational Change Management strategy to help ease the introduction of the new processes to your users is what's actually needed.

2. Data Driven Scenarios

You go through the data model table above and determine that you don't have any use for the majority of the objects and would have to add so many custom objects that it would be easier to simply use a standard Salesforce org and build your own data model.

3. Business Model Scenarios

The Salesforce Platform was originally designed to support Business to Business scenarios, such as allowing companies to use leads and opportunities to manage their sales pipelines and keep track of long term deals with other companies. With a few exceptions, educational institutions typically work directly with students, which would be considered more of a business to consumer model in the commercial space. One of the main benefits of EDA is that it helps to convert the traditional Salesforce B2B model into a B2C model, which is a great fit for most schools. However, if your organization is focused on corporate learning or if you have a similar use case that falls more in line with a traditional B2B business model, then EDA and its associated account models may not be a good fit and you might want to consider using the out-of-the-box Salesforce platform instead.

If your institution meets any of the criteria outlined above, EDA may not be the right tool for you. And it's totally ok if that turns out to be the case. In the long run it will be better to build a solution that truly works for you than trying to shoehorn your data and processes into one that never will.

Common Customizations

Generally EDA is not implemented and used completely out of the box, and for good reason. No two schools operate exactly the same way. EDA is meant to be a foundational data model that gives Institutions of all shapes and sizes access to the core functionality they need to get started, while also allowing them to take advantage of the flexibility of the Salesforce platform by adding additional fields, objects and automations.

That said, there are common customizations that we've seen a number of different schools implement to solve similar use cases. We've listed them in the table on the next page.

There are varying levels of effort (LOE) to stand each one of these up. Some can be handled by your internal staff, while others will most likely require you to work with an implementation partner. An important note, however, is that you don't necessarily need to implement all of these customizations and you also don't need to implement them all at once.

As you review the items in the table, choose the ones that you would consider to be “must haves” in order for your Education Cloud system to work properly, along with others that you’d like to have eventually even if they aren’t required on day 1. And if there are any left that don’t seem applicable to your specific set of use cases, you can skip them for now and revisit them if anything changes in the future.

Have you made other customizations? We’d love to learn more! [Email us](#) with your use case.

CUSTOMIZATION	LOE	WHAT’S IT FOR?	STEPS TO TAKE
CREATE A STUDENT ID FIELD	Low	Create data consistency, synchronize with SIS and other applications, etc.	Add a custom field to the Contact record page. Note: Using this field in an integration involves some additional complexity that’s best handled by an integration specialist.
UPDATE ACCOUNT NAMING CONVENTIONS	Low	Update automatic account naming conventions for clarity and ease of use.	Account Naming Conventions are found in EDA Settings. Learn more: Customize Administrative and Household Account Names .
USE LETTER GRADES, AS OPPOSED TO NUMERIC GRADES	Medium	Track letter grades instead of numeric grades, synchronize with SIS and other applications, etc.	Add a custom “Letter Grade” field to the Course Connection record page and use formulas for automatic conversions between letter and number grades if needed.
TRACK MAJORS & MINORS	Medium	EDA uses the concept of an Academic Program, but students often major in one subject and minor in another.	Use Accounts to track majors and minors and affiliate with student contact records.
TRACK CONCENTRATIONS	Low	Track academic concentration areas in addition to majors and minors.	Add a text or picklist field to the Program Enrollment object. Alternatively, use accounts with record types to track concentrations along with an additional lookup field on the Program Enrollment object.
TRACK STUDENT HOUSING	Medium	While the facility object is traditionally used to store locations related to classrooms, it can also be used to store student housing data with a small customization.	Create a junction object between the contact and facility objects along with a new record type on the facility object to help separate housing related facilities from classroom related facilities.

Common Implementation Scenarios

Whether you're brand new to Salesforce, switching to EDA from Salesforce or another tool, or optimizing existing orgs, your approach to implementation will vary. Learn how to best approach your implementation using the tables on the next page.

Common Implementation Scenarios

SCENARIO	STEPS FOR IMPLEMENTATION
<p>Brand New Org</p>	<p>Follow the installation instructions to install EDA into a new org. Then work with a partner to migrate data from your legacy systems and build any applicable customizations.</p>
<p>Existing Org Without EDA</p>	<p>Analyze any custom objects you've created and map them accordingly before deciding whether EDA is a good fit. If the existing org is being used for processes that are very different from what you'll be doing in EDA and there's little to no overlap between the data that's already in your current org and the data you'll be loading into EDA, you may want to implement EDA in its own org and build an integration to your existing org to only share data that's relevant.</p>

SCENARIO	STEPS FOR IMPLEMENTATION
<p>Existing Non-Salesforce CRM</p>	<p>Start by making a design decision on whether you want to replace your legacy system by migrating all of its data into EDA or keep both systems and integrate them. If you'd like to migrate your data, follow the steps that are outlined for implementing EDA in a new org. If you need to keep your legacy system and integrate it, consider using a middleware tool to build the integrations. Start with the standard EDA data model, then customize as needed to support integration.</p>
<p>Sharing Data Across Multiple CRMs</p>	<p>This is the trickiest scenario. You may have one or more existing Salesforce orgs that may or may not have EDA installed. Approach integration like you would for a non-Salesforce CRM; however, take the opportunity to evaluate your org usage before you begin to see if all orgs are still necessary. An implementation partner or Salesforce.org EDU Services team member can review your current landscape and design an Org Strategy that may help reduce costs and eliminate redundant processes.</p>

Common Integration Points

While EDA can function as a standalone application, we've found that integrating it with other applications can add a significant amount of value.

The next few pages contain a list of common integration points along with what data is typically exchanged between applications.

The process to build each integration will vary from application to application depending on what options each one supports. Some have pre-built Salesforce connectors available. Others may require an ETL tool and others may require file transfers or custom code.

Talk to a [partner](#) or our [Salesforce.org EDU Services Team](#) to learn more about where Education Cloud fits into your university's unique landscape and what options are available to allow it to share data and processes with your other applications.

List of Common Integrations

MARKETING AUTOMATION TOOLS

These include tools like Marketing Cloud and Pardot, as well as some third party tools. These tools are used to send communications to various types of constituents associated with the institution.

- The specific people you want to communicate with can include prospective students, current students, parents, faculty, staff and alumni as well as contacts from corporate partners and sponsors.
- Some tools will allow you to sync additional information, such as completed courses, application status, or alumni donations in order to help narrow down your targeted audiences even further.

STUDENT INFORMATION SYSTEM (SIS)

This is typically a central system used to store course registrations, grades, transcripts, standardized test scores and other student related data.

- While a SIS may be a system of record, it's generally considered to be more of a back office tool whereas portions of Education Cloud can be student or parent facing, so while a large amount of data needs to be synced between the two (Students, Courses, Course Offerings, Programs, Program Plans, etc...), each system uses the data in a different context.

ERP / ACCOUNTING SYSTEM

These systems are used to maintain the University General Ledger and other related financial information.

- Integrations with financial applications are typically done to support processes related to Advancement (e.g. reconciling pledged donations with payments).
- Except in a few very specific cases (Executive, Professional and Continuing Education), course payments are typically recorded directly in the SIS and then synced to a financial system from there.

EVENT MANAGEMENT SYSTEM

Used to track attendance at in-person events as well as online events, such as webinars.

- Contact data is usually synced from Salesforce to the Event Management tool.
- Data related to attendance, both for the event itself and potentially for specific sessions within the event is synced back to Salesforce and can be used for a variety of purposes, including providing credit towards the completion of a course or for use in audience segmentation for future marketing communications.

LEARNING MANAGEMENT SYSTEMS (LMS)

Learning Management Systems are used to deliver course materials. They're most commonly seen in Online Learning scenarios but they can be used to deliver materials for in person courses as well.

- At a minimum, an LMS needs information about the specific course offerings that any materials are associated with along with a list of students who should be able to access them.
- It may also be useful to include Faculty and Staff information, and depending on the underlying data model that's used by the LMS, there may be other requirements as well (e.g. Courses, Grades, etc.).

ENTERPRISE DATA WAREHOUSE

An Enterprise Data Warehouse is typically used as a central location to store data from a variety of sources, where it can be combined, deduplicated and cleansed in preparation for advanced reporting and analytics.

- Sync any master or transactional data for which Education Cloud is considered to be the "Source of Truth."

BI / ANALYTICS TOOLS

The tools build advanced reports and data visualizations when the relationships between the data elements being analyzed are too complex for the standard reports available in Salesforce or when data from multiple systems need to be combined into a single report. External BI tools also allow you to take advantage of additional features like [AI based reporting](#) or [advanced visualizations](#).

RECRUITING & ADMISSIONS APPLICATIONS

Admissions Connect helps streamline K-12 and higher ed application review through data visualization and stronger application communication. Features like personalized action plans, dynamic checklists and chatbot support help build stronger applicant engagement and a more personalized student experience. There are a number of third party solutions if you decide not to use Admissions Connect.

- Sync prospective student data and any related records. A design decision around when to create a contact record for a student (or when to convert a lead to a contact) is required to ensure consistent processes.

THIRD PARTY ADVISING APPLICATIONS

There are a variety of external applications that student success teams may use for advisory activities ranging from degree and career planning to academic performance issues.

- Student and Course information can be sent to the advising tool.
- Advisory activities can also be sent back to Salesforce in the form of cases and tasks if needed for reporting.

STUDENT HOUSING SYSTEMS

These systems are used to track residence information for students who are staying on campus, along with pricing and availability for the various student housing options provided by the university.

- These systems are usually already integrated with Student Information systems, so a direct integration with Salesforce may not be necessary. If a student is staying on campus, the address information on their contact record should be updated to reflect that (which can come from the SIS if it's in sync).

FINANCIAL AID SYSTEMS

These systems are used to track financial aid availability, qualification criteria, applicants and awards.

- Student Contact information can be synced back and forth.
- The actual monetary details of any type of financial aid package are typically sent directly to the University's Student Information and Accounting Systems and don't necessarily need to be sent to Salesforce but an indication that a financial award was given along with any terms and conditions (i.e. maintaining a specific GPA) may be useful to send to Salesforce for easy access by student advisors.

EDA Readiness Initiative

Customers want a way to quickly find apps that leverage EDA in the AppExchange. The new EDA Readiness Initiative is our response to the education community, providing a single place to see which apps are self-certified to work with EDA. This new initiative includes standards and guidelines for ISV partners and signifies a partner's commitment to providing solutions that work with EDA at different levels of complexity: EDA Ready and Powered by EDA. Check out the [EDA Readiness Page on the Salesforce AppExchange](#) to learn more!

Final Steps

Congratulations! You reached the end of the workbook. Now you might be saying to yourself, “I’m just not ready yet!” or “I need more help.” Never fear! We’ve got you covered if you’re looking for more information and support for implementing EDA.

1. Sign-up for the [Get Started with EDA Accelerator Live Webinar](#), which is available both in live format and on-demand. Premier Success Plan customers have the option to sign-up for a 1:1 follow-up with a certified Salesforce.org specialist after the webinar.
2. Head to the [Power of Us Hub](#) an online community for Salesforce.org customers, certified partners, and staff. In the Hub you can ask questions, collaborate, and learn from fellow education customers and Salesforce experts.
3. Head to the all-encompassing [EDA Product Documentation](#) in the Power of Us Hub. The documentation is organized by topics, is searchable, and covers everything from installation to customization. Definitely bookmark this resource!
4. Find Salesforce certified consultants that specialize in serving the higher education community. Check out tools to help you [find and work with a partner](#) in your implementation of EDA. If you need help choosing a partner, review our [“How to Choose a Salesforce Consulting Partner”](#) blog.
5. Connect with [Salesforce.org Success Services](#) to gain access to certified experts, specialists, and resources for every stage of your EDA journey. When you work with Salesforce.org Success Services, you have access to always-on expertise and data-driven insights to plan your strategic roadmap.

WE CAN'T WAIT TO SEE WHAT YOU BUILD USING EDA!

Additional Resources

Ebook: [Building an Integration Strategy](#)

EDA Trial: [Education Data Architecture Trial](#)

Expert Coaching Session: [Getting Started: Education Data Architecture](#)

Landing Page: [Get Started with Education Cloud](#)

Product Documentation: [EDA Data Dictionary](#)

Product Documentation: [EDA Documentation](#)

Product Documentation: [Recommended Data Import Sequence for EDA](#)

Trailblazer Community: [IdeaExchange](#)

Trailhead: [Education Cloud Trailmix](#)

Video: [Install EDA Demo](#)

Worksheet: [Map EDA Objects with Your Existing Data](#)

Have suggestions to improve this workbook? Email Keri Fadden, kfadden@salesforce.com.