Set Up Student Success Alerts

Set up Student Success Alerts so your support staff can create and send alerts about students directly from Slack to SSH.

This article contains these sections:

Pricing and edition information:

Pricing: Paid

Student Success Alerts

Student Success Alerts (SSA) allows support staff (like faculty members or teaching assistants) to raise concerns about students in Slack. The SSA Slack app is integrated with Student Success Hub (SSH). Support staff receive the alert in SSH so they can quickly intervene to help students get back on track.

To create an alert, support staff fill out a form in Slack. The form allows users to enter details about the student and reason for the alert. SSA can also update the user about actions taken on the alert.

When the user submits the Slack form, support staff see the new alert in SSH. Admins can assign specific support staff members to each student and the assigned staff member receives alerts about the student. Support staff then view the alert on the student's Case record and take the necessary next steps to reach out to the student.

> **Note**
>
> Salesforce makes privacy and data security a top priority. This value applies to SSA as it does to all Salesforce products. To learn more about Salesforce's commitment to privacy, read the Privacy Information page.

Tour the App

Let's explore how the Student Success Alerts Slack App works.

When you open the app, the first place you land is the Home tab. The tab includes the following information:

- Create An Alert. Submits a new alert.
- Manage Alerts. View all, unresolved, or resolved alerts that you created.

On the Messages tab, create a new alert using the `/student-alert` command, read an onboarding message about how to use the app, and see your alert history. You also see details about your new alerts and alert status updates on this tab.

On the About tab, get information about the app, an admin configuration option, an App Homepage option, and as with all tabs, create a new alert with the `/student-alert` command.

Before You Install Student Success Alerts

To start using Student Success Alerts, make sure to have the latest version of Student Success Hub and the new Student Success Alerts managed package installed. For more information, read Keep Student Success Hub Up-To-Date.

In addition to installing the latest managed packages, you need an appropriate license and permissions to use SSA. Users who have a Salesforce Platform (CRM) license won't need another license to use SSA. Give users who don't have read and write access to SSH, (likely faculty or teaching support staff) a courtesy Identity license that provides access to SSA. To get Identity licenses for your SSA users, contact your Account Executive (AE).

All users also need Student Success Alerts Managed Package and Student Success Alerts Slack App permission set licenses (PSLs) and the Student Success Alerts permission set to use SSA. Work with your AE to get these two permission set licenses. The Student Success Alerts permission set is delivered with the latest managed package release.

Set Up Slack and Salesforce

Set Up Slack and Salesforce

Before you can set up Student Success Alerts, your version of SSH needs to be up to date, and you need the SSA managed package installed. You also need your AE to provide Identity licenses, the Student Success Alerts Managed Package PSLs, and the Student Success Alerts Slack App PSLs for your SSA users.

Step 1: Enable Slack for Salesforce

1. In Salesforce, from Setup, search for `Slack` and select **Enable Slack for Salesforce**.
2. Accept the Terms and Conditions.

Step 2: Add SSA and Connect Slack to Salesforce

1. Add the Student Success Alerts app to your Slack Workspace.
2. Click **Allow** to grant permissions for the app to access your Slack workspace.
3. Click **Connect** on the page that opens.
4. Enter or choose your Salesforce Username.
5. When a Slack page opens, click **Allow** to read and give Slack permission to access data from your Salesforce account.
6. Read what Slack is asking to access and check **I agree to allow Slack to access my Salesforce account**.
7. Click **Allow**.
8. Click the **Student Success Alerts** app in Slack. If you don't see the welcome message from Student Success Alerts on the Messages tab, refresh Slack.

Step 3: Add the Permission Set Licenses to Users

1. In Salesforce, from Setup, search for `Users` and select **Users**.
2. Choose which kind of users you want to license for Student Success Alerts:
   - For users with Salesforce or Salesforce Platform licenses, click the user you want to provide with SSA access.
   - For users who don't access Salesforce (like faculty members) create new users with a courtesy Identity license. Complete the next step from the new user's setup page.
3. Click **Permission Set License Assignments**.
4. Click **Edit Assignments**.
5. Select **Student Success Alerts Managed Package** and **Student Success Alerts Slack App Permission Set Licenses**.
6. Save your changes.
7. Repeat these steps for all of your SSA users.

Step 4: Assign Users to the Slack App Permission Set

1. In Salesforce, from Setup, search for `Permission Sets` and select **Permission Sets**.
2. Click **Student Success Alerts User**.
3. Click **Manage Assignments**.
4. Click **Add Assignments**.
5. Select all users you want to allow to use the SSA Slack app.
6. Click **Assign**.
7. Review the list and click **Done**.

Step 5: Invite Users to SSA

1. In your Slack app, click the name of your Slack Workspace, then choose **Settings & administration** | **Manage members**.
2. In the new window, select **Invite People**.
3. Enter the email addresses of the support staff you provided the SSA User permission set to. To expedite this process, you can copy and paste a comma separated list.
4. Make sure **Member** is selected as the invite type and click **Send**.

   Slack and Salesforce send emails to the support staff members to set up their accounts and connect the two apps.

Step 6: Create Contact Records for Staff Users

For each teaching staff user, create both a User record and a Contact record. The User record allows staff members to use the Slack app. The Contact record identifies the primary faculty of a given course.

Create a contact record for each faculty member who's assigned to the SSA permission set. Match these fields on the Contact record to the corresponding User fields:

- First Name
- Last Name
- Email

If your institution doesn't manage their Courses, Course Offerings, and Course Connections in Salesforce, skip this step. If you don't manage course information in Salesforce, Student Success Alerts won't include the student's course information.

Step 7: Create Student Contact Records

Each time a Student Success Alert is submitted in Slack, the student's case record is updated in Salesforce. Read Create Student Case Records for steps to create a student case record.

Step 8: Route Alerts to Support Staff

To route an alert to the appropriate support staff member, add the staff member to the student's case record.

> **Note**
>
> If you don't assign a support staff member to the student, the staff member who created the alert is assigned. Read Create an Alert Assignment Rule for details.

1. Go to the student's Contact record.
2. Under Cases, select the student's Case.
3. Open the **Team** tab.
4. Click **Add Member**, and add the individual support staff member or the support staff team.
5. Choose the **Case Team Role**.
6. Save your work.
7. Repeat these steps for all students.

Customize Alert Reasons

SSA comes with a standard set of reasons and a default record type for the alert. If these alert reasons don't meet your needs, you can customize the list to include alert reasons that you define or to remove alert reasons from the list that you don't need. You can also change the default record type for the alert reason.

Provide Your Own List of Alert Reasons

SSA includes nine options for alert reasons. You can customize the list to include alert reasons that you define or to remove alert reasons from the list that you don't need.

If you're new to managing picklist fields, learn more with the Picklist Administration on Trailhead.

Set a Different Default Record Type for Alert Reason

Salesforce sets the default record type for an SSA reason to Academic. Change the default record type for an alert reason to fit your institution's needs.

1. From Setup, search for `Profiles` and select **Profiles**.
2. Click the profile that's assigned to staff members who are SSA users.
3. Click **Object Settings**.
4. Click **Alerts**.
5. Click **Edit**.
6. Select another Record Type as the **Default Record Type**.
7. Save your changes.