

Smart College CRM – Salesforce-based Student Admission & Fee Management System

PHASE 1 – Problem Understanding & Industry Analysis

Title: Smart College CRM – Salesforce Student Admission & Fee Management System

Industry: Education / Higher Education / College Administration

Project Type: Salesforce CRM Implementation (Admin + Developer)

Problem Statement:

Colleges receive thousands of admission applications each year. The current manual process faces challenges in tracking student applications, managing fee payments, communicating admission status, and generating reports for management. This results in delays, errors, and poor transparency.

Goal of the Project:

Develop a Salesforce-based Smart College CRM to **streamline the entire admission cycle** by automating applications, admissions, fee management, notifications, and reporting, improving efficiency, transparency, and student satisfaction.

1. Requirement Gathering

Understand the needs of different stakeholders in the college ecosystem.

- **Students / Applicants:** Submit admission applications online, track application status, make fee payments, receive notifications.
- **Admission Staff:** Manage and review applications, update application status, communicate with applicants.
- **Finance Department:** Track fees, generate receipts, manage refunds, monitor payment deadlines.
- **College Admin / Management:** Monitor admission statistics, generate reports on applications, payments, and departmental intake.

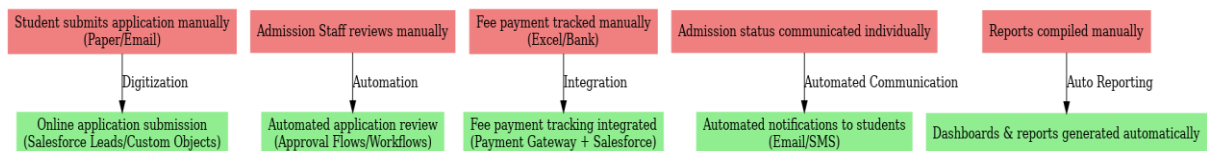
- **IT / Salesforce Admins:** Configure and maintain the CRM system, automate workflows, and ensure data security.

2. Stakeholder Analysis

Identify roles and responsibilities.

- **Primary Stakeholders:**
 - Students → Submit applications, make payments, track admission status.
 - Admission Staff → Review applications, update statuses, communicate with applicants.
 - Finance Staff → Manage fee collection, refunds, and payment records.
 - College Admins → Oversee admissions and generate reports.
- **Secondary Stakeholders:**
 - Salesforce Admins → Configure custom objects, automate flows, maintain system.
 - IT Support → Assist users, troubleshoot issues, ensure uptime.

3. Business Process Mapping



Compare current admission practices vs Salesforce-enabled improvements.

Current Process (Manual/Traditional):

- Applications received manually via forms or email → prone to delays & errors.
- Fee payments tracked manually → delayed reconciliations.
- Admission status communicated individually → time-consuming.
- Reporting is inconsistent and requires manual data compilation.

Proposed Process (Salesforce Enabled):

- Online application submission → stored in Salesforce Leads / Custom Objects.
- Automated review and approval flows for applications.

- Fee payment tracking integrated with Payment Gateway.
 - Automated notifications (Email/SMS) to applicants about admission status.
 - Dashboards & reports for application count, fees collected, and departmental analysis.
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4. Industry-Specific Use Case Analysis

Identify key use cases in college admissions.

- **Application Management**
 - *Problem:* Lost or delayed applications.
 - *Solution:* Salesforce Custom Objects + automated review flows.
 - **Fee Management**
 - *Problem:* Manual tracking leads to errors.
 - *Solution:* Payment gateway integration + automated tracking in Salesforce.
 - **Admission Status Notifications**
 - *Problem:* Students unaware of their status.
 - *Solution:* Automated Email/SMS alerts via Salesforce Flows.
 - **Reporting & Analytics**
 - *Problem:* Reports take time and are prone to errors.
 - *Solution:* Real-time dashboards and pre-configured reports.
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5. AppExchange Exploration

Identify apps to accelerate CRM development.

- **Notification Apps:** SMS/Email alerts to students about admission updates.
- **Payment Apps:** Stripe / Razorpay integration for online fees.
- **Survey/Feedback Apps:** Collect student feedback post-admission.
- **Reporting & Analytics Apps:** Enhanced dashboards for management insights.

