

# Smart College CRM – Project Implementation Document

## Problem Statement

A college receives thousands of admission applications every year. The process is mostly manual, with challenges in tracking student applications, managing fee payments, communicating admission status to applicants, and generating reports for management. The goal of the Smart College CRM project is to streamline the entire admission cycle using Salesforce by automating applications, admissions, fee management, and reporting.

## Project Implementation Phases

- **Phase 1: Requirement Understanding:** Collect requirements from Admission Officers, Accounts Officers, and Students. Business flow: Application → Admission → Fee Payment → Enrollment.
- **Phase 2: Org Setup:** Configure company profile, fiscal year, and users. Create roles and profiles (Admission Officer, Accounts Officer, Admin). Apply OWD settings for data privacy.
- **Phase 3: Data Modeling:** Create custom objects Application\_\_c and Fee\_\_c. Establish relationships with Student (Contact) and Admission records.
- **Phase 4: Automation (Admin):** Build validation rules for admission dates. Use flows to auto-create fee records and send admission emails. Implement approval process for scholarships.
- **Phase 5: Apex Development:** Develop Apex Trigger on Fee\_\_c to update admission status when full payment is received. Write SOQL queries for pending fees. Create test classes.
- **Phase 6: UI Development:** Create Lightning App 'College CRM' with tabs (Applications, Students, Fees). Customize record pages for Student 360 View.
- **Phase 7: Reporting & Dashboards:** Develop reports on Applications per Course and Fee Tracking. Create dashboards for Admission Funnel and Monthly Fee Collection.
- **Phase 8: Final Demo:** Demonstrate end-to-end flow: Application → Admission → Fee → Enrollment. Showcase reports and dashboards to stakeholders.

This Salesforce project provides a complete solution for digitalizing college admission and fee processes, ensuring efficiency, transparency, and better student engagement.