

EduConnect : Smart Learning and Enrollment CRM Portal (Phase 2)

Goal:

The goal of this project is to build a Salesforce-based Student Enrollment and Learning Portal that automates the complete admission process. It will streamline student inquiries, course enrollments, and fee tracking while reducing manual effort and delays. Automated notifications and reminders will improve communication with students and faculty. Overall, the system will enhance efficiency, accuracy, and reporting, ensuring a smoother enrollment experience for educational institutes.

Problem Statement:

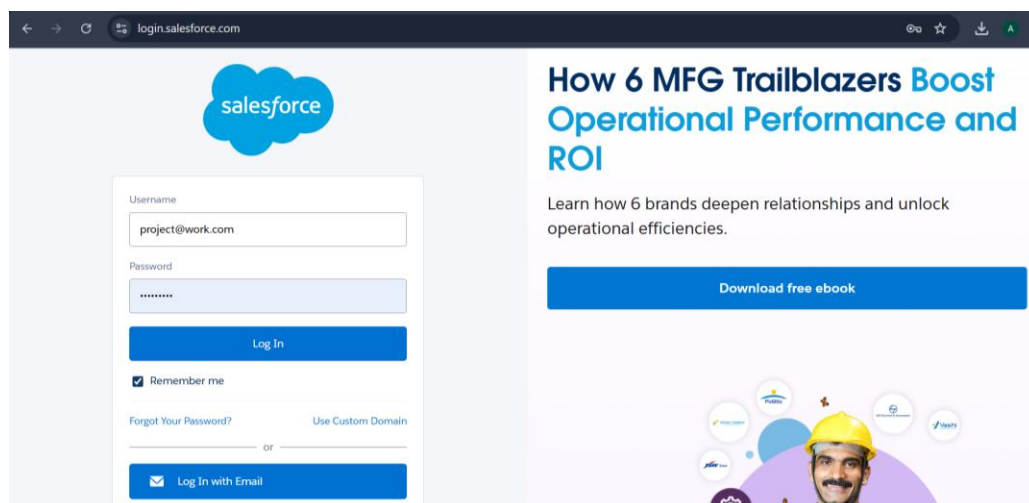
Educational institutes face challenges in managing student inquiries, admissions, and course enrollments due to manual processes. This causes delays, missed follow-ups, and inefficiency. A Salesforce-based portal will automate lead capture, admissions, fee tracking, and notifications, ensuring faster enrollment and better reporting.

Phase 2: Org Setup & Configuration

Phase 2 focuses on the initial Salesforce Organization setup and configuration. In this phase, the Salesforce Developer Org was set up, and core administrative configurations were made to establish a secure and structured environment for the Smart Student Enrollment and Learning Portal.

Org Setup

- Created and configured a Salesforce Developer Org.
- Set up the company profile including organization name.
- Set up the fiscal year.
- Set up the business hours and Holidays.
- Defined operating parameters to align with the educational institute's requirements.



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Arya Vishwakarma


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Details

Name

Arya Vishwakarma

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Email

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Address

Phone

Mobile

Manager

Company Name

Ideal Management Group

Related

Groups (0)

Files (0)

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To Do List

← → ↺

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EduConnect Profile

Help for this Page

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Profile Edit

Save Save & New Cancel

Name

EduConnect Profile

User License

Salesforce

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Description

Custom App Settings

🚫 Required Information

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	✓	○	Queue Management (standard__QueueManagement)	✓	○
Analytics Studio (standard__Insights)	✓	○	Sales (standard__LightningSales)	✓	○

The screenshot shows the Salesforce Setup interface for "Organization Fiscal Year Edit: Ideal Management Group". The left sidebar contains a search bar with "fis" and a list of settings including "Company Settings" and "Fiscal Year". The main content area has a header "Fiscal Year" and a sub-header "Organization Fiscal Year Edit: Ideal Management Group". Below this, a message states: "To specify the fiscal year type for your organization, choose one of the options below." There are two radio buttons: "Standard Fiscal Year" (selected) and "Custom Fiscal Year". A yellow warning box states: "Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change." Below the warning is a "Change Fiscal Year Period" form. The form includes a "Name" field with "Ideal Management Group", a "Fiscal Year Start Month" dropdown set to "April", and a "Fiscal Year is Based On" section with two radio buttons: "The ending month" and "The starting month" (selected). There are "Save" and "Cancel" buttons at the bottom of the form.

The screenshot shows the Salesforce Setup interface for "Organization Business Hours". The left sidebar contains a search bar with "business" and a list of settings including "Company Settings" and "Business Hours". The main content area has a header "Business Hours" and a sub-header "Organization Business Hours". Below this, a message states: "Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate. If you enter blank business hours for a day, that means your organization does not operate on that day." There is a "Holidays" link. Below this is a "Business Hours Detail" section with an "Edit" button. The section contains a table with columns "Business Hours Name", "Office Timing", and "Time Zone". The table has a row for "Business Hours" with "Office Timing" showing a table of days and hours, and "Time Zone" showing "(GMT+05:30) India Standard Time (Asia/Kolkata)". Below the table, there is an "Active" checkbox (checked), a "Created By" field with "Arya.Vishwakarma" and "12/09/2025, 8:40 pm", and a "Last Modified By" field with "Arya.Vishwakarma" and "12/09/2025, 8:40 pm". There is an "Edit" button at the bottom.

Business Hours Name	Office Timing	Time Zone																
Business Hours	<table border="1"> <thead> <tr> <th>Day</th> <th>Hours</th> </tr> </thead> <tbody> <tr> <td>Sunday</td> <td>No Hours</td> </tr> <tr> <td>Monday</td> <td>9:00 am to 6:00 pm</td> </tr> <tr> <td>Tuesday</td> <td>9:00 am to 6:00 pm</td> </tr> <tr> <td>Wednesday</td> <td>9:00 am to 6:00 pm</td> </tr> <tr> <td>Thursday</td> <td>9:00 am to 6:00 pm</td> </tr> <tr> <td>Friday</td> <td>9:00 am to 6:00 pm</td> </tr> <tr> <td>Saturday</td> <td>9:00 am to 6:00 pm</td> </tr> </tbody> </table>	Day	Hours	Sunday	No Hours	Monday	9:00 am to 6:00 pm	Tuesday	9:00 am to 6:00 pm	Wednesday	9:00 am to 6:00 pm	Thursday	9:00 am to 6:00 pm	Friday	9:00 am to 6:00 pm	Saturday	9:00 am to 6:00 pm	(GMT+05:30) India Standard Time (Asia/Kolkata)
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Conclusion

Phase 2 successfully completed the setup of the Salesforce Org environment. By configuring company settings, user management, and security controls, a secure and structured foundation was established to support subsequent phases of the Smart Student Enrollment and Learning Portal project.