

Project : ALUMNI CONNECT – STUDENT & ALUMNI ENGAGEMENT PLATFORM

- **Industry:** Education / EdTech
- **Project Type:** B2C Salesforce CRM implementation for student-alumni networking
- **Target Users:** Students, Alumni, College Career Services, Administrators

1.1 Problem Statement

Colleges and universities often struggle to maintain strong engagement between alumni and current students. Networking, mentorship, and placement opportunities are fragmented, and there is no centralized platform for alumni-student interactions. This leads to missed opportunities for career guidance, internships, and funding support.

To address this, the institution wants to implement a Salesforce CRM-based Alumni Connect Platform to:

- Automate alumni and student registration and profile management
- Enable alumni-student networking and mentorship programs
- Manage events, job postings, and career support activities
- Provide dashboards to track engagement and outcomes

1.2 Use Cases

Alumni Management

- Maintain alumni profiles with education, career, and expertise details.
- Segment alumni based on industry, graduation year, and location.

Student Engagement

- Students can search for alumni mentors based on career interest.
- Enable direct communication (chat/email scheduling) with alumni.

Event Management

- Schedule alumni meets, webinars, and mentorship sessions.
- Send automated SMS/email invites and reminders.

Job & Internship Opportunities

- Alumni can post job openings and internships.
- Students can apply directly through the portal.

Donations & Fundraising

- Track alumni contributions and donations.
- Generate receipts and acknowledgments automatically.

Reporting

- Dashboard for alumni-student interactions.
- Track number of mentorship sessions, job referrals, and events.
- Monitor fundraising contributions and engagement trends.

Phase 1: Problem Understanding & Industry Analysis

Goal: understand networking challenges, define scope & success criteria.

Steps

1. Requirement Gathering:

- Students want access to mentorship, guidance, jobs
 - Survey students to understand the specific support they seek, such as personalized career advice, referrals, interview preparation, and access to alumni working in their target industries.
 - Students value one-on-one mentorship, which enables them to clarify academic choices, internship applications, and career decisions.
- Alumni want to engage via events, donations, networking
 - Gather input from alumni on preferred methods of interaction, like participating in career panels, giving guest lectures, making donations, and joining networking events.
 - Alumni also want streamlined ways to reconnect with peers and contribute their expertise to help current students.

- Admin needs a unified platform for managing data
 - College administrators require tools to maintain accurate student and alumni records and automate communications.
 - The ideal platform should enable easy organization of events, donations, and networking opportunities with centralized, up-to-date data.

2. Stakeholder Analysis: Students, Alumni, College Admins, Placement Officers.

- Identify all the groups affected by the project: students, alumni, college administrators, and placement officers.
- Each stakeholder group is analyzed for their needs and influence. For instance, placement officers focus on job integration, while students prioritize mentorship, and alumni value continued involvement with the institution.
- Establish channels to regularly collect feedback from every stakeholder category and use it throughout the development cycle.

3. Business Process Mapping: Current system is manual (spreadsheets, emails).

- Document and analyze the current systems and workflows used for alumni-student interaction.
- This typically reveals manual efforts like spreadsheets and emails, which are prone to errors, duplication, and inefficiency.
- Map existing processes to uncover bottlenecks and opportunities for automation (such as automating event invites or donation tracking).

4. Use Case Examples:

- Directory Search: Students and alumni want to locate peers based on criteria like graduation year, industry, or location.
- Chat: Enable secure messaging for students and alumni to communicate directly, ask questions, or seek advice.
- Event Invitations: Automate event reminders and RSVP management for webinars, reunions, or panel discussions.

- **Donation Management:** Integrate fundraising features for tracking contributions and recognizing donors.

5. AppExchange Exploration: Check for existing community templates / Nonprofit Cloud apps.


- Research available solutions, such as Salesforce community templates or Nonprofit Cloud apps, to avoid reinventing the wheel.
- Assess existing tools to determine what can be adapted or integrated with the new platform, comparing their suitability against the requirements collected earlier.

Phase 2 : Org Setup & Configuration

Goal: prepare Salesforce org with users, profiles, permissions for alumni & students.

Steps

1. **Edition:** Education Cloud (preferred) or Sales Cloud + Community.
2. **Company Profile:** Set timezone, currency (for donations), locale.


SETUP
Company Information

The organization's profile is below.

[User Licenses \(10+\)](#) |
 [Permission Set Licenses \(10+\)](#) |
 [Feature Licenses \(11\)](#) |
 [Usage-based Entitlements \(10+\)](#)

Organization Detail
[Edit](#)

Organization Name	Prof. Ram Meghe Institute of Technology and Research	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	Amravati 444605 Maharashtra India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	Marathi (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	348 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	133 KB (1%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK000007YA0v
		Organization Edition	Developer Edition
		Instance	CAN96

Created By [OrgFarm EPIC](#), 7/17/2025, 1:31 PM
 [Edit](#)

Modified By [Kartik Umale](#), 9/15/2025, 11:23 PM

3. Users & Licenses:

- Admin

SETUP

Users

User

Kartik Umale

[User Profile Help for this Page](#)

[Permission Set Assignments \(5\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(1\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Apps \(4\)](#) | [Third-Party Account Links \(0\)](#) | [Built-In Authenticators \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(10\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

[Edit](#) [Sharing](#) [Change Password](#) [View Summary](#)

Name	Kartik Umale	Role	Admin
Alias	kar	User License	Salesforce
Email	kartikumale123@gmail.com [Verified]	Profile	System Administrator
Username	kartikumale123457@agentforce.com	Active	<input checked="" type="checkbox"/>
Nickname	User17536046509858213158 ⓘ	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	Prof. Ram Meghe Institute of Technology and Research	Knowledge User	<input checked="" type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> ⓘ
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> ⓘ
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> ⓘ
App Registration: One-Time Password Authenticator	[Connect] ⓘ	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> ⓘ

[See Description, Edit Access](#) ⓘ [End App Monitor Email](#) ⓘ

- Alumni Coordinator (staff)

SETUP

Users

User

Amit Deshmukh

[User Profile Help for this Page](#)

[Permission Set Assignments \(3\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(1\)](#) | [OAuth Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Built-In Authenticators \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(1\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

[Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	Amit Deshmukh	Role	Alumni Coordinator
Alias	ades	User License	Salesforce Platform
Email	kartikumale123@gmail.com [Verified]	Profile	Alumni Coordinator
Username	amit.deshmukh@example.com	Active	<input checked="" type="checkbox"/>
Nickname	User17579232369511340324 ⓘ	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> ⓘ
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> ⓘ
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> ⓘ
App Registration: One-Time Password Authenticator	i	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> ⓘ

[See Description, Edit Access](#) ⓘ [Salesforce CRM Contact User](#) ⓘ

- Students (Community users)

SETUP

Users

User

Priya Patel

[Permission Set Assignments \(0\)](#) |
 [Permission Set Assignments: Activation Required \(0\)](#) |
 [Permission Set Group Assignments \(0\)](#) |
 [Permission Set License Assignments \(0\)](#) |
 [Personal Groups \(0\)](#) |
 [Public Group Membership \(0\)](#) |
 [Queue Membership \(0\)](#) |
 [Team \(0\)](#) |
 [Managers in the Role Hierarchy \(2\)](#) |
 [OAuth Apps \(0\)](#) |
 [Third-Party Account Links \(0\)](#) |
 [Built-in Authenticators \(0\)](#) |
 [Installed Mobile Apps \(0\)](#) |
 [Authentication Settings for External Systems \(0\)](#) |
 [Login History \(0+\)](#) |
 [User Provisioning Accounts \(0\)](#)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Priya Patel	Role	Student
Alias	ppate	User License	Salesforce
Email	karikumale123@gmail.com [Verify]	Profile	Student
Username	priya.patel@student.edu	Active	<input checked="" type="checkbox"/>
Nickname	User17579231548828255802 [i]	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	[i]
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> [i]
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> [i]
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> [i]
App Registration: One-Time Password Authenticator	[i]	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> [i]

- Alumni (Community users)

SETUP

Users

User

aanya badoniya

[Permission Set Assignments \(0\)](#) |
 [Permission Set Assignments: Activation Required \(0\)](#) |
 [Permission Set Group Assignments \(0\)](#) |
 [Permission Set License Assignments \(0\)](#) |
 [Personal Groups \(0\)](#) |
 [Public Group Membership \(0\)](#) |
 [Queue Membership \(0\)](#) |
 [Team \(0\)](#) |
 [Managers in the Role Hierarchy \(2\)](#) |
 [OAuth Apps \(0\)](#) |
 [Third-Party Account Links \(0\)](#) |
 [Built-in Authenticators \(0\)](#) |
 [Installed Mobile Apps \(0\)](#) |
 [Authentication Settings for External Systems \(0\)](#) |
 [Login History \(0+\)](#) |
 [User Provisioning Accounts \(0\)](#)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	aanya badoniya	Role	Alumni
Alias	abado	User License	Salesforce
Email	karikumale123@gmail.com [Verified]	Profile	Alumni
Username	alumni@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17579230417049358424 [i]	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	[i]
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> [i]
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> [i]
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> [i]
App Registration: One-Time Password Authenticator	[i]	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> [i]

4. Profiles & Permission Sets:

- Alumni Profile

SETUP

Profiles

Profile

Alumni

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

Edit

Clone

Delete

View Users

Name	Alumni	
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>
Description		
Created By	Kartik Umale: 9/15/2025, 1:16 PM	Modified By: Kartik Umale: 9/16/2025, 4:08 PM

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Location	Location Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location Group	Location Group Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Account	Account Layout [View Assignment]	Macro	Macro Layout [View Assignment]
Account Brand	Account Brand Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]

- Student Profile

SETUP

Profiles

Profile

Student

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

Edit

Clone

Delete

View Users

Name	Student	
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>
Description		
Created By	Kartik Umale: 9/15/2025, 1:17 PM	Modified By: Kartik Umale: 9/16/2025, 4:08 PM

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Location	Location Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location Group	Location Group Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Account	Account Layout [View Assignment]	Macro	Macro Layout [View Assignment]
Account Brand	Account Brand Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]

5. Roles & Hierarchy:

Admin > Alumni Coordinator > Alumni/Students.

Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

- Prof. Ram Meghe Institute of Technology and Research
 - [Add Role](#)
 - Admin
 - [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Alumni Coordinator
 - [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Alumni
 - [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Student
 - [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)

6. OWD & Sharing Rules (optional):

- Alumni & Students private by default.
- Sharing rules to allow “Connections”.

7. Sandbox Setup: Developer sandbox for build, UAT for testing.

Deliverables: Org ready with profiles, roles, and login policies.

Phase 3 : Data Modeling & Relationships

Goal: design objects for alumni, students, connections, and events.

1. Objects & Fields:

- Alumni

- Fields: Name, Graduation Year, Course, Current Employer, Designation, Industry, Location.

SETUP > OBJECT MANAGER

Alumni

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules

Details
Description
API Name
Alumni_c
Custom
✓
Singular Label
Alumni
Plural Label
Alumnis
Enable Reports
✓
Track Activities
✓
Track Field History
✓
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

- Student

- Fields: Name, Batch, Course, Area of Interest, Career Goals.

SETUP > OBJECT MANAGER

Student

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers

Details
Description
API Name
Student_c
Custom
✓
Singular Label
Student
Plural Label
Students
Enable Reports
✓
Track Activities
✓
Track Field History
✓
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

- Connection Request (Custom Object)
 - Fields: Student, Alumni, Status (Pending/Accepted/Rejected), Request Date.

SETUP > OBJECT MANAGER

Connection Request

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers

Details

Description

API Name

Connection_Request__c

Custom

✓

Singular Label

Connection Request

Plural Label

Connection Requests

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

- Event (Standard Campaign or Custom Object)
 - Fields: Title, Date, Mode (Online/Offline), Participants.

SETUP > OBJECT MANAGER

Events

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers

Details

Description

API Name

Events__c

Custom

✓

Singular Label

Events

Plural Label

Events

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

- Donation (Opportunity Object)
 - Fields: Alumni, Amount, Date, Purpose.

SETUP > OBJECT MANAGER

Donation

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers

Details

Description

API Name
Donation__c

Custom
✓

Singular Label
Donation

Plural Label
Donations

Enable Reports

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

2. Relationships:

- Student ↔ Alumni
- Alumni ↔ Event

Deliverables: ER diagram, field list, sample records.

Phase 4 : Process Automation

- Validation Rules

1) Alumni validation rules

SETUP > OBJECT MANAGER					
Alumni					
Details	Validation Rules 3 Items, Sorted by Rule Name				
Fields & Relationships					
Page Layouts					
Lightning Record Pages					
Buttons, Links, and Actions					
Compact Layouts					
Field Sets					
Object Limits					
	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
	Email_Format_Validation	Email	Please enter a valid email address.	✓	Kartik Umale, 9/22/2025, 8:22 PM
	Graduation_Year_Not_In_Future	Top of Page	Graduation Year cannot be in the future.	✓	Kartik Umale, 9/22/2025, 8:02 PM
	Phone_number_must_be_10_digits	Phone	Phone number must be 10 digits	✓	Kartik Umale, 9/23/2025, 12:34 AM

2) Event validation rules

SETUP > OBJECT MANAGER					
Events					
Details	Validation Rules 2 Items, Sorted by Rule Name				
Fields & Relationships					
Page Layouts					
Lightning Record Pages					
Buttons, Links, and Actions					
Compact Layouts					
	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
	Event_Date_Not_Past	Date	Event date cannot be in the past.	✓	Kartik Umale, 9/23/2025, 12:18 AM
	Online_Event_Link_Required	Venue/Meeting Link	Venue/Meeting Link is required for Online events.	✓	Kartik Umale, 9/23/2025, 12:23 AM

3) Donation validation rules

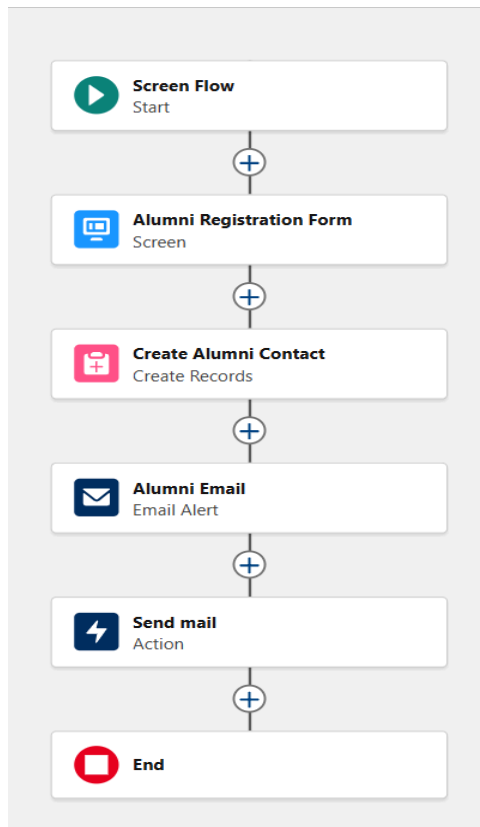
SETUP > OBJECT MANAGER					
Donation					
Details	Validation Rules 2 Items, Sorted by Rule Name				
Fields & Relationships					
Page Layouts					
Lightning Record Pages					
Buttons, Links, and Actions					
	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
	Donation_Amount_Positive	Amount	Donation amount must be greater than zero.	✓	Kartik Umale, 9/23/2025, 12:26 AM
	Donation_Date_Not_Future	Date	Donation date cannot be in the future.	✓	Kartik Umale, 9/23/2025, 12:28 AM

4) Student validation rules

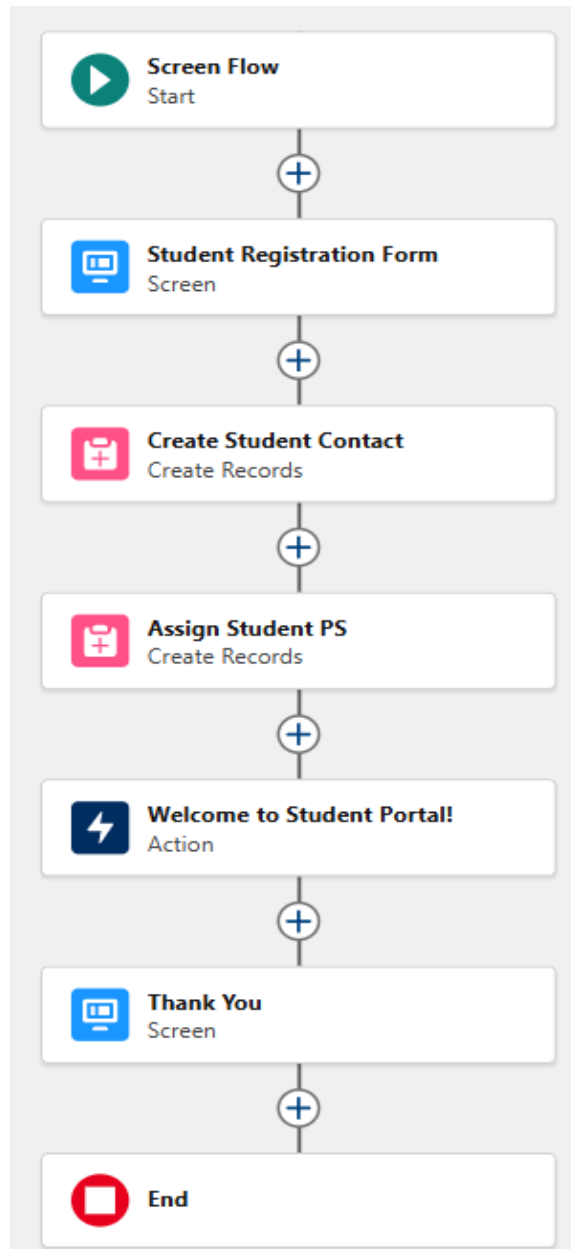
SETUP > OBJECT MANAGER					
Student					
Details	Validation Rules 1 Items, Sorted by Rule Name				
Fields & Relationships					
Page Layouts					
Lightning Record Pages					
	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
	Student_Email_Validation	Email	Please enter a valid student email address	✓	Kartik Umale, 9/22/2025, 8:26 PM

- **Flow Builder**

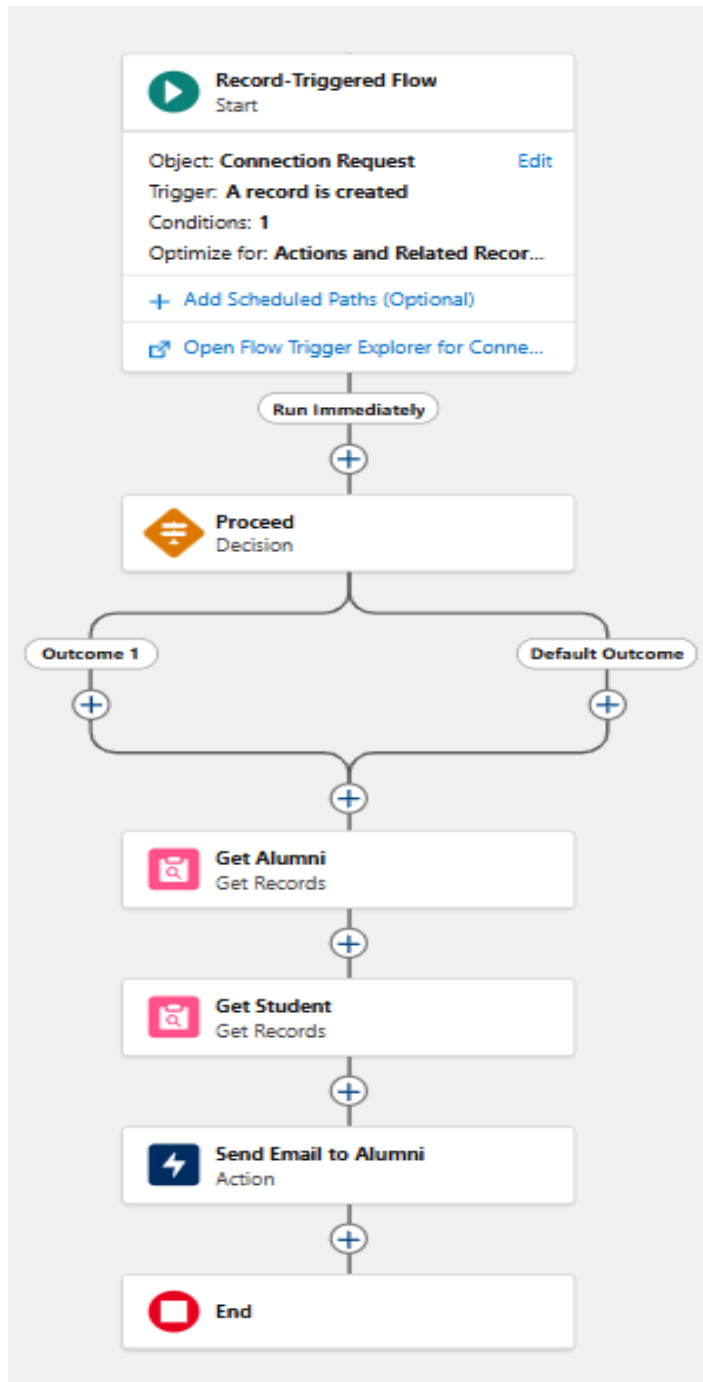
1) Alumni Registration Flow



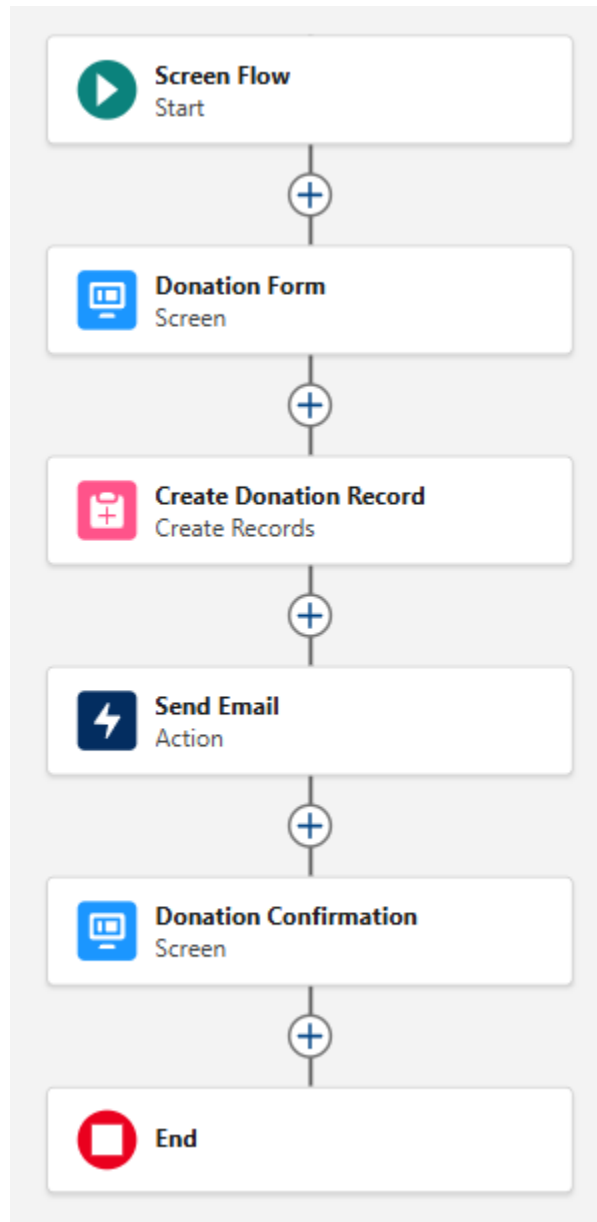
2) Student Registration Flow



3) Notify Alumni On Connection Request



4) Donation Flow



Phase 5 : Apex Programming (Developer)

In the **Alumni Connect project**, **Apex was not required**, because:

- All necessary automation was implemented using **Flows and declarative tools**:
 - **Record-triggered flows** handle alumni registration, connection requests, and email alerts.
- No complex calculations, batch processing, or external API callouts were needed.
- The project scope is **basic**, so **declarative automation** is sufficient to meet all functional requirements.

Using Apex was optional, and skipping it simplified the project without affecting functionality.

Future Scope

Although Apex was not used in this project, it could be implemented in future enhancements:

- **Complex Business Logic** → Advanced rules for matching students with alumni or calculating engagement scores.
- **Batch Apex** → Processing large volumes of records efficiently, e.g., alumni statistics or monthly summaries.
- **Scheduled Apex** → Automate periodic updates or notifications.
- **External API Integration** → Callouts to external services like SMS gateways, analytics platforms, or AI systems.
- **Reusable Apex Classes** → Encapsulate logic for scalability and maintenance.

Phase 6 : User Interface Development

- **Lightning App Builder**

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ


* Developer Name ⓘ

Description ⓘ

Alumni & Student Engagement Platform for Networking, Events, Donations, and

App Branding

Image ⓘ



Clear

Primary Color Hex Value ⓘ


▼

#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview



Alumni Connect
Alumni & Student Engagement Platform for Networking, E...

- **Tabs**

App Settings

App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you have available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

- Account Brands
- Accounts
- Activation Targets
- Activations
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Approval Submission Details

Create

Selected Items

- Home
- Alumnis
- Admins
- Chatter
- Students
- Events
- Donations
- Connection Requests
- Reports
- Dashboards

▶

◀

▲

▼

- Record Pages

- Admins Record page

Admin

Kartik Umale

New Opportunity

Edit

New Case

Related

Details

Admin Name

Kartik Umale

Owner

Kartik Umale

Phone

Email

kartikumale123@gmail.com

Role & Access

Role

Super Admin

Status

Active

Assigned Department

Access Level

Full Access

System Link

Related Salesforce User

Kartik Umale

Created By

Kartik Umale, 9/26/2025, 5:14 PM

Last Modified By

Kartik Umale, 9/26/2025, 5:14 PM

Activity

Filters: All time • All activities • All types

Refresh

Expand All

View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

2. Alumni Record page

Alumni

Vikas Patil

New Event

New Task

Edit

Graduation Year

9/13/2023

Industry

Retail

Email

vikas.patil@example.com

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Profile Details

Connections

Alumni Name

Vikas Patil

Owner

Kartik Umale

Graduation Year

9/13/2023

Course

Civil

Contact

Career Details

Current Employer

Location

Industry

Retail

Contact Info

Email

vikas.patil@example.com

Phone

(919) 191-9191

3. Student Record page

Student

Anjali Nair

New Opportunity

Edit

New Case

Related

Details

Student Name

Anjali Nair

Owner

Kartik Umale

Course

MBA

Batch

Graduation Year

2025

Roll Number

Career Goals

Area of Interest

Career Goals

Contact Info

Email

anjalinair@example.com

Phone

(999) 988-8877

Created By

Kartik Umale, 9/26/2025, 3:52 PM

Last Modified By

Kartik Umale, 9/26/2025, 3:52 PM

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Phase 7 : Integration & External Access

In the **Alumni Connect project**, no external system integration was required, because:

- All alumni and student data is stored **within Salesforce custom objects**.
- **Flows, trigger flows, and formulas** handle all internal automations (e.g., registration welcome emails, connection requests).
- No external APIs or services (like AI scoring, SMS gateways, or third-party databases) were needed.
- Reports and Dashboards provide all the insights required internally.

Future Scope

If the project were extended, integration could include:

- **External Email/SMS Services** → send notifications through Twilio, SendGrid, or similar.
- **Alumni Portal API** → connect Salesforce to an external alumni portal using **Named Credentials**.
- **Real-Time Engagement Tracking** → use **Platform Events** or **Change Data Capture** to sync updates outside Salesforce.
- **Advanced Analytics / AI** → integrate with ML models for engagement predictions.

“Phase 7 is **Not Applicable** for this project in terms of external integrations. However, the project is fully capable of supporting future integration if needed, and internal reporting/dashboard features provide comprehensive insights into alumni engagement and activity.”

Phase 8 : Data Management & Deployment

- Data Import Wizard

1. Alumni data

The screenshot shows the Salesforce Data Import Wizard interface for 'Alumni data'. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A progress bar indicates the current step is 'Edit mapping', with 'Choose data' and 'Start import' as previous and next steps respectively. The main heading is 'Edit Field Mapping: Alumnis'. Below this, a table maps CSV headers to Salesforce fields. The table has columns: Edit, Mapped Salesforce Object, CSV Header, and three Example columns.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Alumni Name	Alumni Name	Amit Sharma	Priya Verma	Rahul Mehta
Change	Email	Email	amit.sharma@example.com	priya.verma@example.com	rahul.mehta@example.com
Change	Phone	Phone	9876543210	9123456780	9988776655
Change	Graduation Year	Graduation_Year	2018	2019	2020
Change	Designation	Designation	Software Engineer	Business Analyst	Consultant

2. Student data


The screenshot shows the Salesforce Data Import Wizard interface for 'Student data'. The layout is similar to the Alumni data screen, with the progress bar indicating the 'Edit mapping' step. The main heading is 'Edit Field Mapping: Students'. The table below maps CSV headers to Salesforce fields for student data.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Student Name	Student Name	Rohit Gupta	Anjali Nair	Karan Singh
Change	Email	Email	rohit.gupta@example.com	anjali.nair@example.com	karan.singh@example.com
Change	Phone	Phone	8888777766	9998888877	7777666655
Change	Course	Course	B.Tech	MBA	MCA
Change	Graduation Year	Graduation Year	2025	2025	2025

- Duplicate Rules (Optional)

- **Data Export & Backup**

Object Manager ▾


SETUP
Data Export

Monthly Export Service Help for this Page ?

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export:
A data export is currently in progress for your organization.

[Export Now](#)
[Schedule Export](#)

Your export has been queued. You will receive an email notification when it is completed.

Scheduled By	Kartik Umale
Schedule Date	9/26/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

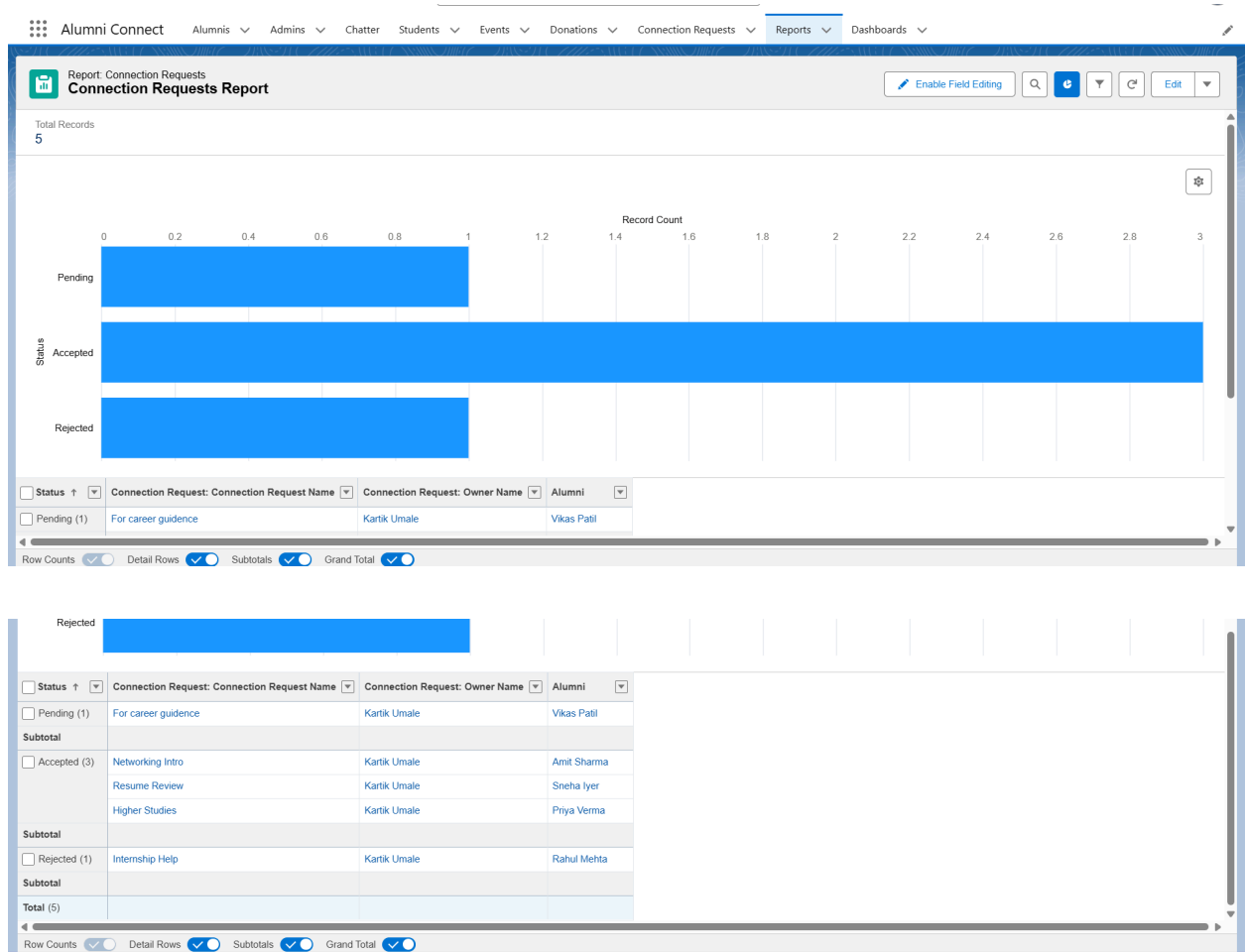
Phase 9 : Reporting, Dashboards & Security Review

- **Reports**

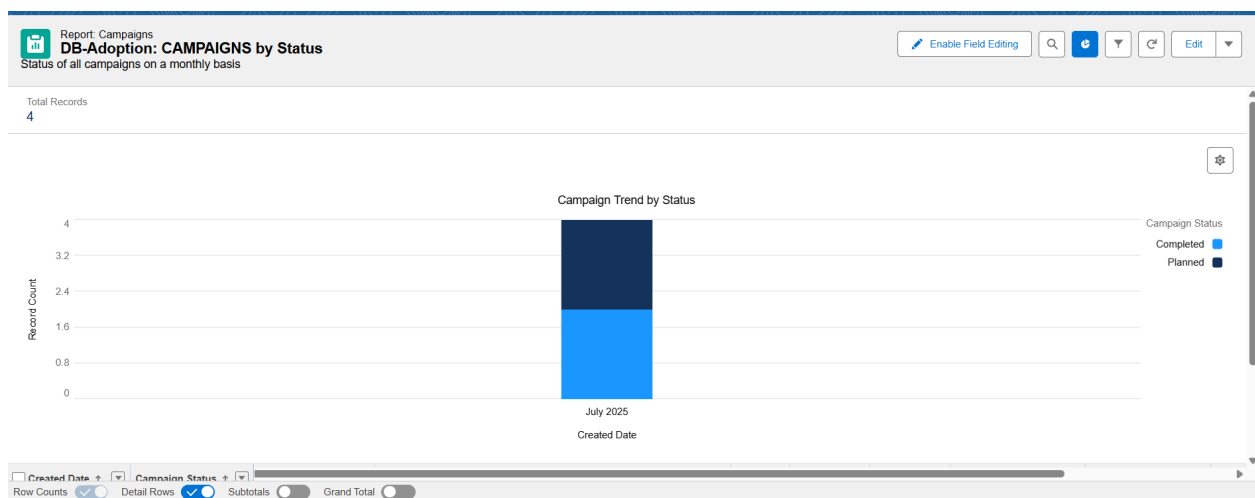
1. Alumni Registrations Report

Report: Alumni Registrations Report Enable Field Editing Search Add Chart Filter Refresh Edit				
Total Records: 7				
Graduation Year	Alumni: Alumni Name	Alumni: Owner Name	Email	Alumni: Created Date
<input type="checkbox"/> CY2025 (1)	at	Kartik Umale	kartikumale123@gmail.com	9/22/2025
Subtotal				
<input type="checkbox"/> CY2023 (1)	Vikas Patil	Kartik Umale	vikas.patil@example.com	9/26/2025
Subtotal				
<input type="checkbox"/> CY2021 (1)	Sneha Iyer	Kartik Umale	sneha.iyer@example.com	9/26/2025
Subtotal				
<input type="checkbox"/> CY2020 (1)	Rahul Mehta	Kartik Umale	rahul.mehta@example.com	9/26/2025
Subtotal				
<input type="checkbox"/> CY2018 (2)	Amit Sharma	Kartik Umale	amit.sharma@example.com	9/26/2025
	Priya Verma	Kartik Umale	priya.verma@example.com	9/26/2025
Subtotal				
<input type="checkbox"/> CY2015 (1)	Kartik	Kartik Umale	kartikumale123@gmail.com	9/23/2025
Subtotal				

2. Connection Requests Report

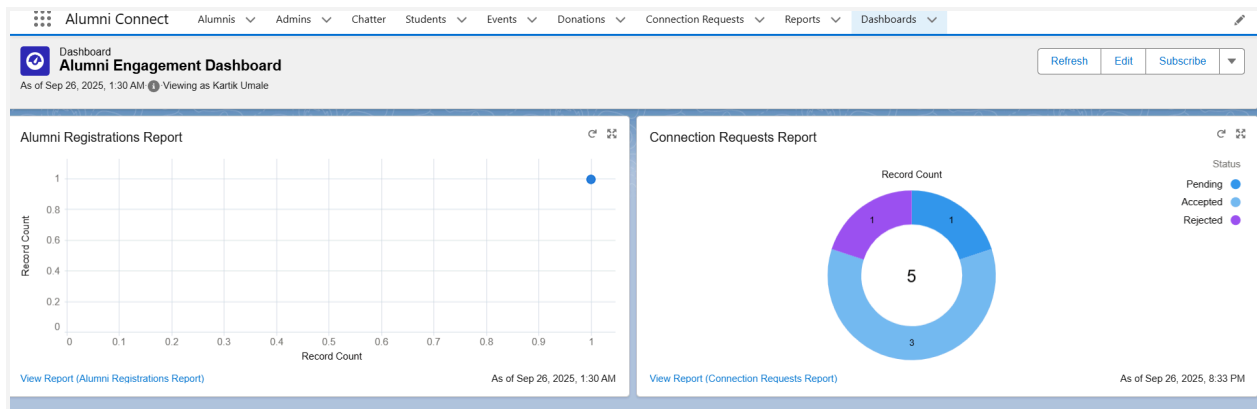


3. Report: Campaigns DB-Adoption: CAMPAIGNS by Status



- **Dashboards**

1. Alumni Engagement Dashboard



- **Sharing Settings**

Organization-Wide Defaults		Edit		Organization-Wide Defaults Help ?
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies	
Admin	Public Read/Write	Private	✓	
Alumni	Public Read Only	Private	✓	
Connection Request	Private	Private	✓	
Donation	Public Read Only	Private	✓	
Events	Private	Private	✓	
Student	Private	Private	✓	

Phase 9 : Final Presentation & Demo Day

Video Link -

https://drive.google.com/file/d/1m2D2CDOPGR91V5CuM4IXNrSSKwy3l_Ep/view?usp=sharing