

# Student Success Hub - College Application & Mentorship System

- **Industry & Target Users**

- **Industry:** Education / Non-Profit
- **Target Users:** Program Administrators, Mentors, and Students

- **Problem Statement**

The industry that currently uses spreadsheets to track all its students, mentors, and college applications. This is causing a big problem because:

- It's hard to see how a student is doing with all their applications in one place.
- Mentors often forget about scheduled sessions with their students, and there are no easy reminders.
- The Program Administrator can't easily see who needs help or many students have submitted their applications.

The goal is to build a simple Salesforce app that fixes these problems.

- **Use Cases**

- **Track Everything in One Place**  
Salesforce provides a single view for each student, where the Program Administrator can see the application submitted by the student, Mentorship Session etc.
- **Automate Reminders & Notifications**  
Students and mentors receive email reminders before each scheduled mentorship session. This reduces missed meetings in the mentorship program
- **Analyze Student & Mentor Progress**  
Monitor how many students have submitted applications and their approval status. This data-driven approach helps the organization make informed decisions and improve outcomes.

## Phase 1: Problem Understanding & Industry Analysis

**Goal:** Understand the requirements, users, and workflows of the Student Success Hub and plan the Salesforce implementation that will later support applications, mentorship sessions, and reporting.

### 1. Requirement Gathering

- **Talk to Stakeholders:**

- **Program Administrator:** Manages students, mentors, applications, sessions, and reports.
- **Mentors:** Volunteer guidance providers; schedule sessions and track student progress.
- **Students:** High school participants submitting college applications.

- **Example Requirements:**

- Track all students with details like name, high school, GPA, and assigned mentor.
- Track all mentors and link them to multiple students.
- Track each college application for a student with the target university and application status.
- Log mentorship sessions with date, time, and notes.
- Avoid errors in application submission (e.g., ensure essays are completed before marking as submitted).
- Generate reports and dashboards showing student progress, mentor sessions, and application statistics.

## 2. Stakeholder Analysis

- **Program Administrator:** Set up the system, assign mentors, track applications, and generate reports
- **Mentor:** Guide students, schedule, and log mentorship sessions
- **Student:** Submit applications, attend sessions, track progress

## 3. Business Process Mapping

- **Student Application & Mentorship Flow:**
  - Student creates or updates college applications.
  - Program Administrator assigns a mentor.
  - Mentor schedules and conducts mentorship sessions.
  - Progress is tracked (essays completed, applications submitted).
  - Administrators generate reports to monitor overall program progress.

## 4. Industry-Specific Use Case Analysis

- **Non-profit education:**

- Difficulty tracking multiple students and mentors.
- Limited real-time visibility into application status.
- Challenges in managing mentorship schedules efficiently.

- **Salesforce app requirements:**

- Centralized student and mentor database.
- Application and session tracking with validation rules.
- Reporting and dashboards for monitoring metrics.

## 5. AppExchange Exploration

- Research existing apps for student or mentorship tracking.
- Many exist but are generic or complex.
- The project will build a custom, simpler solution tailored for Future Scholars, which provides learning in Salesforce setup, data modeling, and basic automation.

## 6. Additional Insights for Phase 1

- Define custom objects and fields: student, Mentor, Application, Mentorship Session.
- Plan relationships (Master-Detail and Lookup).
- Prepare sample data for testing workflows.
- Plan validation rules and picklist values for later automation.
- Identify basic reporting needs and metrics for dashboards.

## Phase 2: Org Setup & Configuration

**Goal:** Prepare the Salesforce environment to support the Student Success Hub app, ensuring proper user access, security, and working conditions for Mentors and Managers.

### 1. Salesforce Edition

- Use Developer Edition (Dev Org) — a free Salesforce org for building and testing the project.

### 2. Company Profile Setup

- Navigate to Setup → Company Settings → Company Information.
- Fill in:

- Company Name: Future Scholars
  - Time Zone: IST (or as per your location)
  - Currency: INR or USD, depending on the project
- These settings ensure accurate timestamps and currency for applications and mentorship sessions.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'company' and a list of settings including Company Settings, Calendar Settings, Public Calendars and Resources, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and 'Student Success Hub'. It displays the organization's profile with various details:

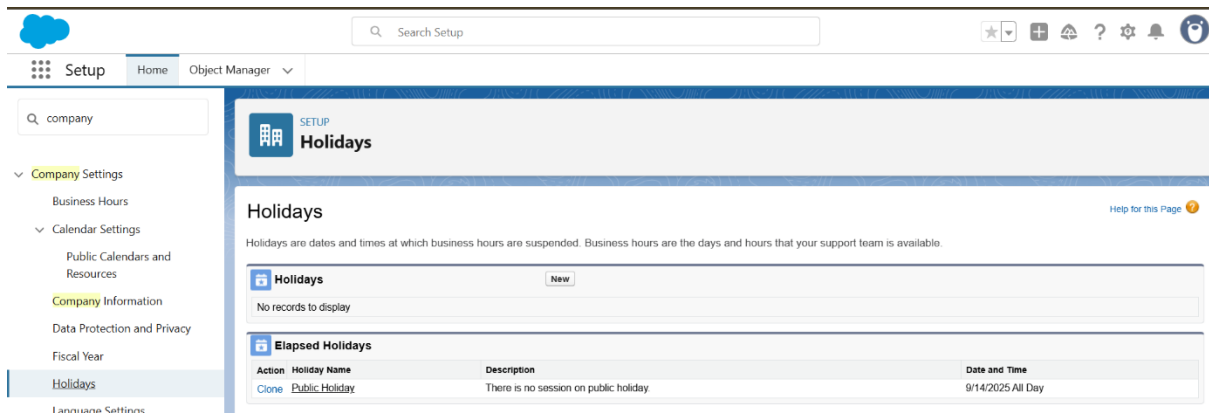
| Organization Detail                   |                                     | Edit                                |   |
|---------------------------------------|-------------------------------------|-------------------------------------|---|
| Organization Name                     | Student Success Hub                 | Phone                               |   |
| Primary Contact                       | OrgFarm EPIC                        | Fax                                 |   |
| Division                              |                                     | Default Locale                      | English (United States)                                 |
| Address                               | United States                       | Default Language                    | English   |
| Fiscal Year Starts In                 | January                             | Default Time Zone                   | (GMT-07:00) Pacific Daylight Time (America/Los_Angeles) |
| Activate Multiple Currencies          | <input type="checkbox"/>            | Currency Locale                     | English (United States) - USD                           |
| Enable Data Translation               | <input type="checkbox"/>            | Used Data Space                     | 657 KB (13%) <a href="#">View</a>                       |
| Newsletter                            | <input checked="" type="checkbox"/> | Used File Space                     | 22 KB (0%) <a href="#">View</a>                         |
| 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      | 00DgL000007bbf1   |
|                                       |                                     | Organization Edition                | Developer Edition                                       |

### 3. Business Hours & Holidays

- Go to Setup → Business Hours → create “Future Scholars Working Hours”:
- Monday to Friday: 09:00 AM – 06:00 PM
- Saturday and Sunday: Closed (optional)
- Go to Setup → Holidays → add public holidays.
- This ensures sessions and approvals occur only during working hours.

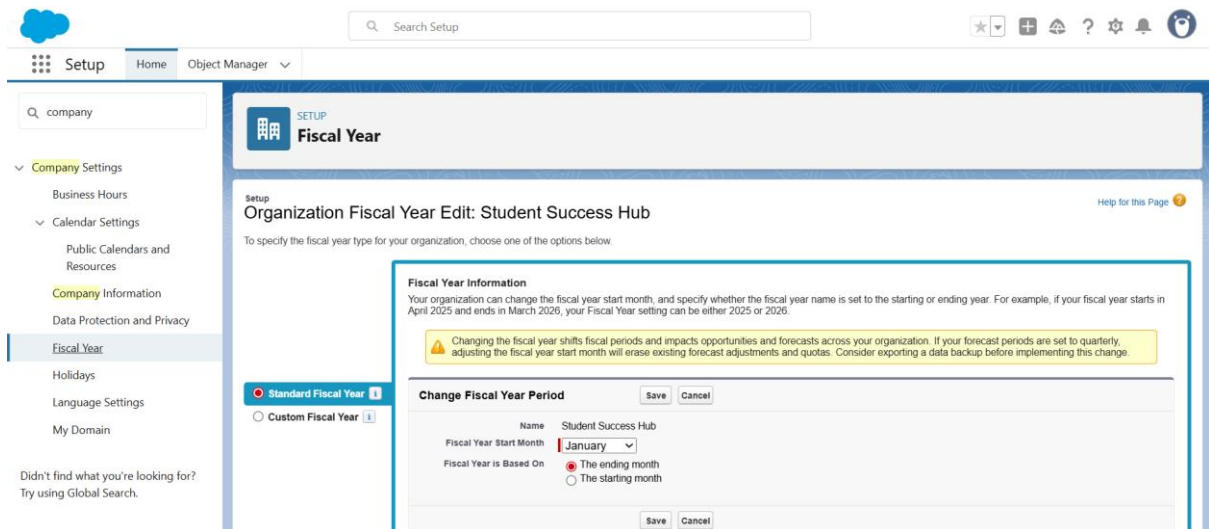
The screenshot shows the Salesforce Setup interface for Business Hours. The left sidebar has a search bar with 'company' and a list of settings including Company Settings, Business Hours (selected), Calendar Settings, Public Calendars and Resources, Company Information, Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and Lanouage Settings. The main content area is titled 'Business Hours' and 'Organization Business Hours'. It displays a table of business hours:

| Action               | Business Hours Name *         | Active                              | Time Zone   | Default                             |
|----------------------|-------------------------------|-------------------------------------|---|-------------------------------------|
| <a href="#">Edit</a> | <a href="#">Default</a>       | <input checked="" type="checkbox"/> | (GMT-07:00) Pacific Daylight Time (America/Los_Angeles) | <input type="checkbox"/>            |
| <a href="#">Edit</a> | Future Scholars Working Hours | <input checked="" type="checkbox"/> | (GMT-07:00) Pacific Daylight Time (America/Los_Angeles) | <input checked="" type="checkbox"/> |



## 4. Fiscal Year

- Use Standard Fiscal Year (Jan–Dec) to maintain consistent reporting.



## 5. User Setup

- Create users under Setup → Users → Users → New User
  - **User**
    - Mentor 1
    - Manager 1
  - **Role**
    - Mentor
    - Manager
  - **Profile**
    - Mentor Profile
    - Manager Profile

**Users**

User: Ravi Sharma

Role: Mentor

User License: Salesforce

Profile: Mentor Profile

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Mobile Push Registrations: [View](#)

Data.com User Type: [View](#)

## 6. Profiles

- **Mentor Profile:**
  - Access: Student, Application, Mentorship Session (Read/Create/Edit their assigned records)
  - No access to sharing rules, reports by default
  - Login Hours: 09:00 AM – 06:00 PM, Mon–Fri
- **Manager Profile:**
  - Full access to all objects, reports, and dashboards
  - Unrestricted login hours

**Profiles**

Profile: Mentor Profile

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.

Profile Detail

Name: Mentor Profile

User License: Salesforce

Description:

Created By: Nishant Kadu, 9/14/2025, 2:45 AM

Modified By: Nishant Kadu, 9/16/2025, 9:53 AM

## 7. Roles

- Create hierarchy under Setup → Roles → Set Up Roles:
- Roles ensure proper record visibility based on hierarchy.

**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](#)

- Student Success Hub
  - Add Role
  - CEO Edit | Del | Assign
    - Add Role
    - CFO Edit | Del | Assign
      - Add Role
      - COO Edit | Del | Assign
        - Add Role
        - Manager Edit | Del | Assign
          - Add Role
          - SVP, Customer Service & Support Edit | Del | Assign
            - Add Role
            - SVP, Human Resources Edit | Del | Assign
              - Add Role
              - SVP, Sales & Marketing Edit | Del | Assign
                - Add Role
                - Test Role Edit | Del | Assign

## 8. Permission Sets

- Create Reports Access under Setup → Permission Sets → New
  - Label: Reports Access
  - Description: “Allows mentors to access reports and dashboards”
  - License: None
- Enable permissions: Run Reports, View Dashboards
- Assign only to mentors who require reporting access

**Permission Sets**

On this page you can create, view, and manage permission sets.

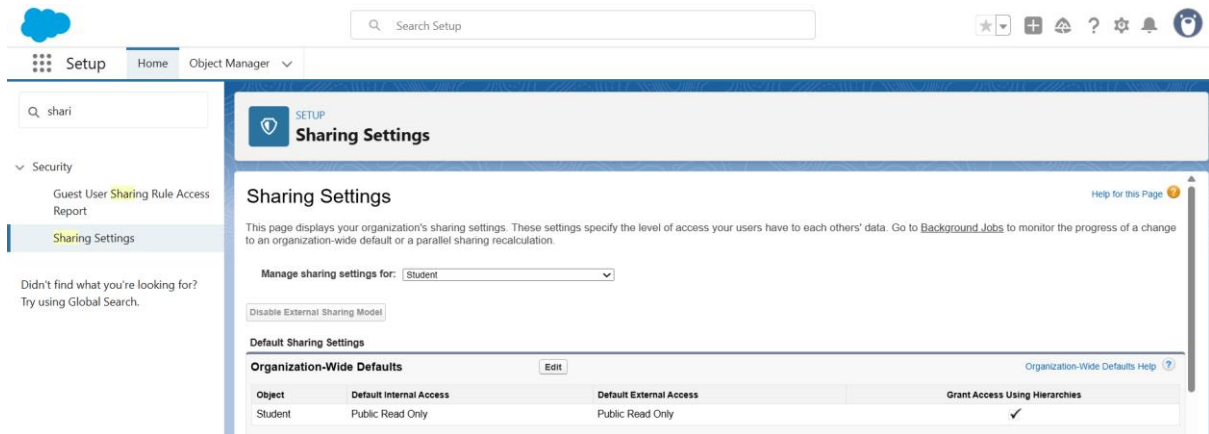
[All Permission Sets](#) [Edit](#) [Delete](#) [Create New View](#)

[New](#) [f](#)

| Action                                    | Permission Set Name | Description                                      | License                |
|---|---------------------|--|------------------------|
| <a href="#">Clone</a>                     | BPAC2CPPermSet      |  | Cloud Integration User |
| <a href="#">Del</a> <a href="#">Clone</a> | Reports Access      | Allows mentors to access Reports and Dashboards. |                        |

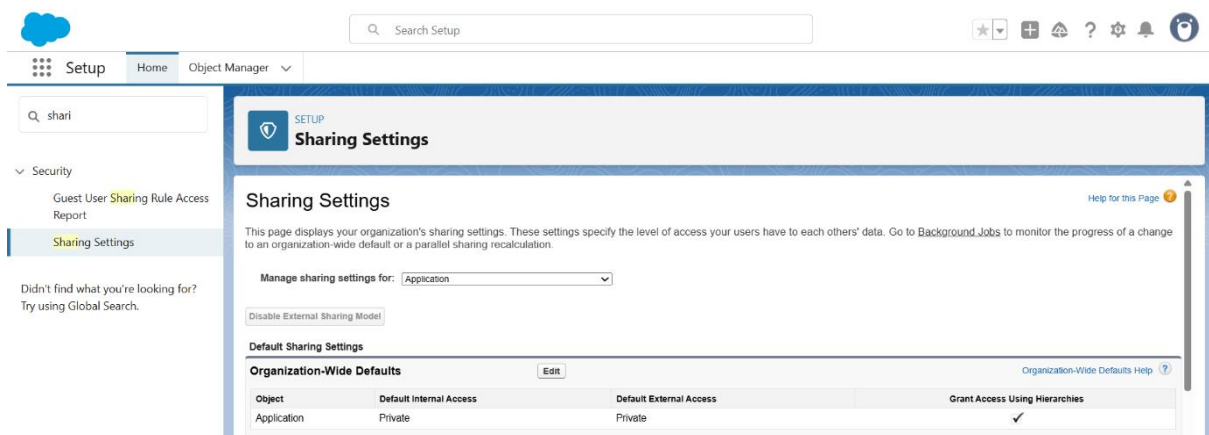
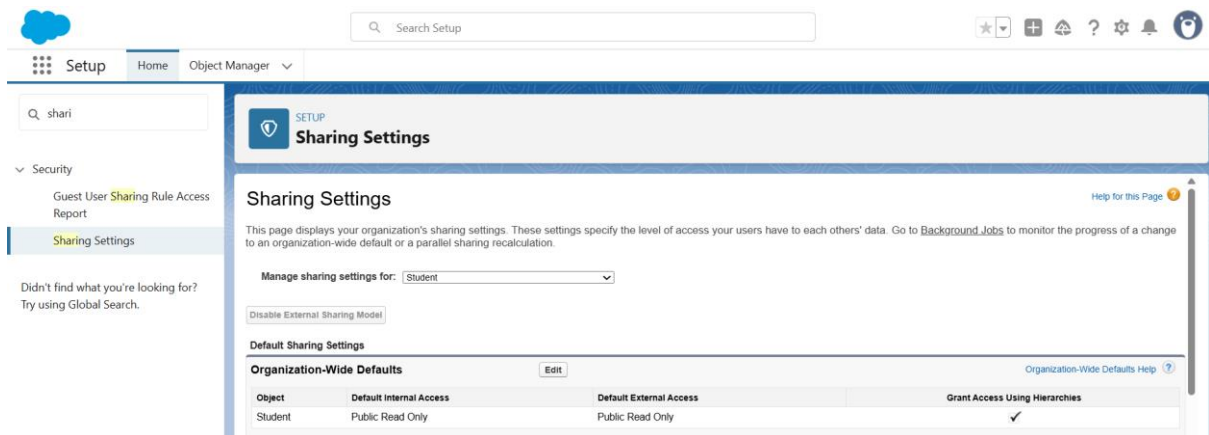
## 9. Org-Wide Defaults (OWD)

- **Student\_\_c** → Public Read Only
- **Application\_\_c** → Private (only owner + manager)
- **Mentorship\_Session\_\_c** → Private



## 10. Sharing Rules

- This allows mentors to view applications assigned to their program.



## 11. Login Access Policies

- Restrict mentors to login only 09:00 AM – 06:00 PM, Mon–Fri.
- Managers have unrestricted login hours.



Login Hours

EditDelete

Login Hours Help?

| Day       | Start Time  | End Time    |
|-----------|-------------|-------------|
| Sunday    | All Day     | All Day     |
| Monday    | 9:00 AM PDT | 6:00 PM PDT |
| Tuesday   | 9:00 AM PDT | 6:00 PM PDT |
| Wednesday | 9:00 AM PDT | 6:00 PM PDT |
| Thursday  | 9:00 AM PDT | 6:00 PM PDT |
| Friday    | 9:00 AM PDT | 6:00 PM PDT |
| Saturday  | 9:00 AM PDT | 6:00 PM PDT |