

## Phase 1. Project Title

### SN SmartLearn - Student & Course Management System

## 2. Problem Statement

An online education platform is currently managing student applications, course enrollments, and communications through a fragmented system of spreadsheets and emails. This manual process is inefficient, prone to error, and lacks a centralized view of student data. As the platform grows, this approach is unsustainable, making it difficult to provide a quality student experience, track enrollment trends, and scale operations effectively.

The company requires a robust Salesforce CRM solution to overcome these challenges.

## 3. Objectives

The primary goals of this Salesforce implementation are to:

- **Automate** the student application and enrollment process to minimize manual errors.
- **Centralize** all student, course, and progress data into a single source of truth.
- **Track** student progress, course history, and assessment results effectively.
- **Streamline** communications with students, instructors, and the admissions team.
- **Enable** real-time dashboards and reports for management to monitor key metrics like enrollment and retention.

## 4. Stakeholder Analysis

The key stakeholders and their primary needs are identified as follows:

- **Admissions Team:** Needs an efficient system for tracking applications and reducing manual data entry.
- **Course Instructors:** Require easy access to student enrollment lists and progress data.
- **Students:** Expect a smooth, transparent enrollment process and timely, relevant communication.
- **Management:** Wants clear visibility into the admissions funnel, course popularity, and student retention rates for strategic decision-making.
- **IT/Admin:** Responsible for ensuring system stability, data integrity, and security.

## 2. Business Process Mapping

A comparison of the current and proposed business processes highlights the intended improvements.

### Current Process (Before Salesforce)

1. A prospective student submits an application via a web form.
2. An administrator manually enters the application data into a spreadsheet.
3. The admissions team reviews applications from the shared spreadsheet.
4. All communication (updates, requests) is handled via individual emails, which are difficult to track.
5. Course enrollment and progress are logged in separate, disconnected documents.

### Proposed Process (After Salesforce Implementation)

1. A student's application from the web form is **automatically captured** as a Lead record in Salesforce.

2. An automated workflow assigns the application, creates follow-up tasks, and updates its status.
3. Once approved, the Lead is converted into Contact (Student), Account (if applicable), and custom Enrollment records.
4. Automated welcome emails and deadline reminders are sent to students via email alerts.
5. All student data, course history, and progress are tracked in a unified, 360degree view.

### 3. Industry-Specific Use Case Analysis

The EdTech industry has unique requirements that this project will address:

- **Student Enrollment:** Automatically capture applications from web forms and track the status from submission to enrollment.
- **Course Management:** Maintain a centralized inventory of all courses, including details on modules and assigned instructors.
- **Student Progress Tracking:** Utilize custom objects to log student progress, assignment completion, and grades.
- **Cohort Management:** Group students by program or start date for targeted communication and specialized reporting.
- **Alumni Relations:** Build a foundation to manage relationships with graduates for future engagement and networking opportunities.

### 4. AppExchange Exploration

To enhance functionality, we will explore solutions on the Salesforce AppExchange:

- **Form Integration Apps (e.g., FormAssembly, Formstack):** To build complex web forms that map directly to Salesforce objects for seamless data capture.

- **Document Generation (e.g., Conga, DocuSign):** For automatically generating and sending enrollment agreements or completion certificates.
- **Enhanced Notification Apps (e.g., Twilio):** To implement SMS/WhatsApp notifications for critical reminders and updates.

## 5. Conclusion

This initial analysis confirms that a Salesforce CRM implementation is the ideal solution to address SN-SmartLearn's challenges. The project will automate manual processes, create a centralized data system, and provide the analytical tools needed to scale operations and enhance the overall student experience.

## Phase 2 - Org Setup & Configuration

### 1. Salesforce Editions

We used a **Salesforce Developer Edition Org** for this implementation. This edition was selected because it provides all the core CRM features required for our project, such as custom objects, roles, profiles, automation tools, and APIs. It also supports AppExchange integration, which we plan to explore in later phases.

### 2. Company Profile Setup

- Setup → **Company Information**
- Updated **Organization Name** to SN SmartLearn.
- Set **Default Currency** as INR (Indian Rupees).
- Configured **Locale** as English (India) to ensure formatting of numbers, currency, and dates as per Indian standards.
- Set **Time Zone** to (GMT+5:30) Asia/Kolkata.

This ensures consistency across all student and instructor records, communications, and reports.

The screenshot displays the Salesforce Setup interface. On the left, a navigation menu includes 'Setup', 'Home', and 'Object Manager'. Below these, a search bar contains 'compa'. The main content area is titled 'Company Information' and shows the profile for 'SN SmartLearn'. The page includes links for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10)'. The 'Organization Detail' section is expanded, showing fields like Organization Name, Primary Contact, Division, Address, Fiscal Year, and various system settings. The 'Created By' field shows 'OrgPam.EPIC' and the 'Modified By' field shows 'Nishant Dubey'.

Organization Detail	
Organization Name	SN SmartLearn
Primary Contact	Nishant Dubey
Division	
Address	Madhya Pradesh, India
Fiscal Year Starts In	April
Activate Multiple Currencies	<input checked="" type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU

Created By: OrgPam.EPIC, 7/18/2025, 4:16 AM  
Modified By: Nishant Dubey, 9/20/2025, 4:21 AM

### 3. Business Hours & Holidays

- Setup → **Business Hours** → Created SN SmartLearn Hours as **9:00 AM to 6:00 PM (Mon–Fri)**.
- Setup → **Holidays** → Added major holidays like **Diwali, Republic Day, Independence Day, and New Year**.

These settings ensure that automation processes like case escalations, reminders, and email alerts respect the organization's working schedule.

The screenshot shows the Salesforce Setup interface for configuring Business Hours. The left sidebar includes a search bar with "business" entered, and a navigation menu with "Company Settings" and "Business Hours" selected. The main content area is titled "Organization Business Hours" and includes a description: "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." Below this is a "Business Hours Edit" form with three steps: Step 1. Business Hours Name (with fields for "Business Hours Name" set to "SN SmartLearn Hours" and "Active" checked), Step 2. Time Zone (with a dropdown set to "(GMT+05:30) India Standard Time (Asia/Kolkata)"), and Step 3. Business Hours (a table for days of the week with time ranges and checkboxes for 24 hours). The table shows Sunday through Saturday, all with a time range of 9:00 AM to 6:00 PM and the 24 hours checkbox unchecked.

## 4. Fiscal Year Settings

- Setup → Fiscal Year
- Configured Standard Fiscal Year (April–March) to align with the Indian academic and financial cycle.

This setup ensures reporting and dashboards for admissions, enrollments, and revenue match the organization’s fiscal planning.

The screenshot shows the Salesforce Setup interface for configuring the Fiscal Year. The left sidebar includes a search bar with "fiscal year" entered, and a navigation menu with "Company Settings" and "Fiscal Year" selected. The main content area is titled "Organization Fiscal Year Edit: SN SmartLearn" and includes a description: "To specify the fiscal year type for your organization, choose one of the options below." Below this is a "Fiscal Year Information" section with a warning message: "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 with fields for "Name" (set to "SN SmartLearn"), "Fiscal Year Start Month" (set to "April"), and "Fiscal Year is Based On" (with radio buttons for "The ending month" selected and "The starting month" unselected). The form has "Save" and "Cancel" buttons.

<https://onfarm-5e644081b6-dev-ed.develop.lightning.force.com/lightning/setup/forecastFiscalYear/home>

## 5. User Setup & Licenses

We created different users to represent key stakeholders of the system:

- **Admissions Officer** – Responsible for managing student applications and enrollment.
- **Course Instructor** – Access to course records, enrolled student lists, and progress data.
- **Student (Test User)** – Limited access to check the student experience.

Each user was assigned appropriate licenses (Salesforce / Salesforce Platform) depending on their responsibilities.

## 6. Profiles

We created custom profiles by cloning the **Standard User Profile** and tailoring objectlevel permissions:

- **Admissions Profile** – Full access to Leads, Contacts, and Enrollment objects.
- **Instructor Profile** – Access to Course and Student Progress objects.
- **Student Profile** – Read-only access to their own course and progress records.

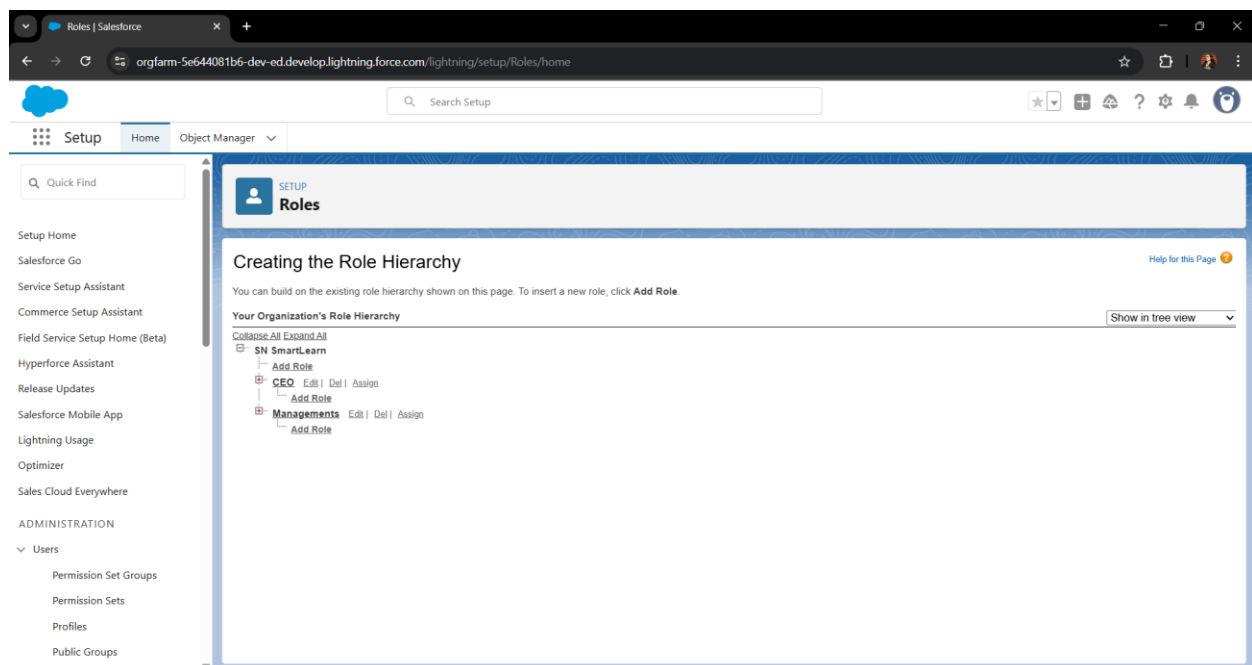
Profiles ensure each role has the exact level of access needed to perform their duties, reducing risks of unauthorized data exposure.

## 7. Roles

Setup → **Roles** → Created a hierarchy to control data visibility:

- **Management (Top)** ○ **Admissions Head** ○ **Course Instructor** ○ **Students**

This hierarchy ensures managers and admissions heads can view all related data, while instructors and students see only what is relevant to them.



## 8. Permission Sets

To provide additional, flexible access without altering profiles, we created:

- **Progress Tracking Access** → For instructors to log and monitor student progress.
- **Report Viewer** → For management to access analytical dashboards.

Permission Sets give fine-grained control and can be assigned on a need basis.

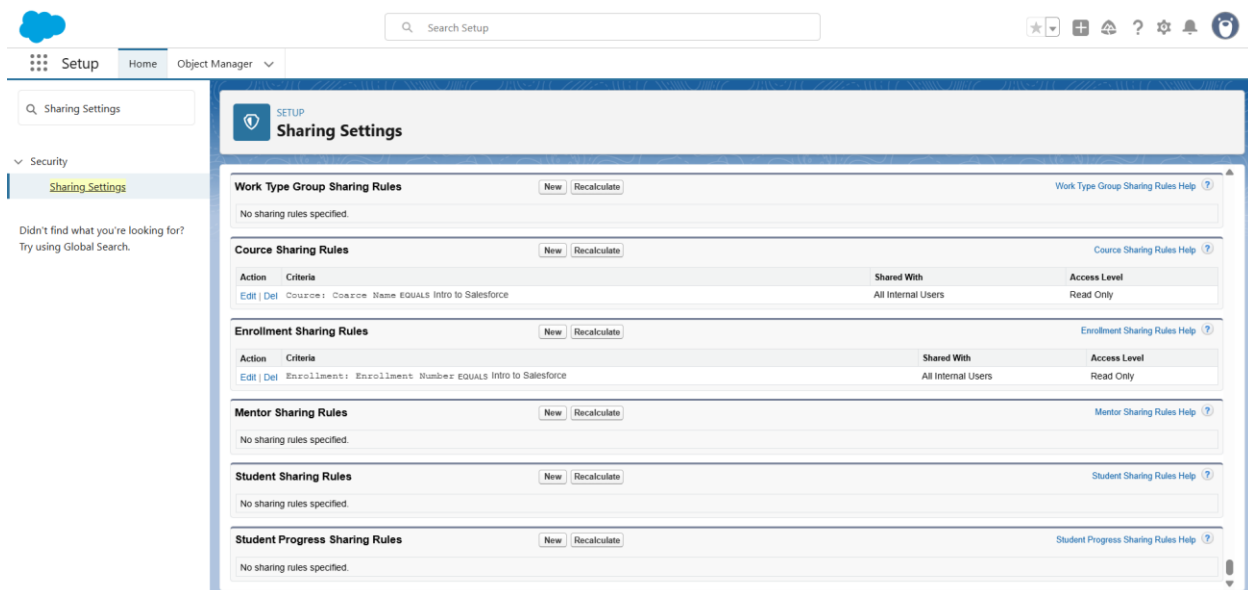


## 9. Org-Wide Defaults (OWD)

Setup → **Sharing Settings** → Configured the following:

- **Students** → Private (students can only view their own records).
- **Courses** → Public Read/Write (so instructors and admins can update them).
- **Enrollments** → Controlled by Parent (data visibility depends on related student/course record).

This enforces data security and ensures confidentiality of student records.



## 10. Sharing Rules

We implemented sharing rules for controlled data access:

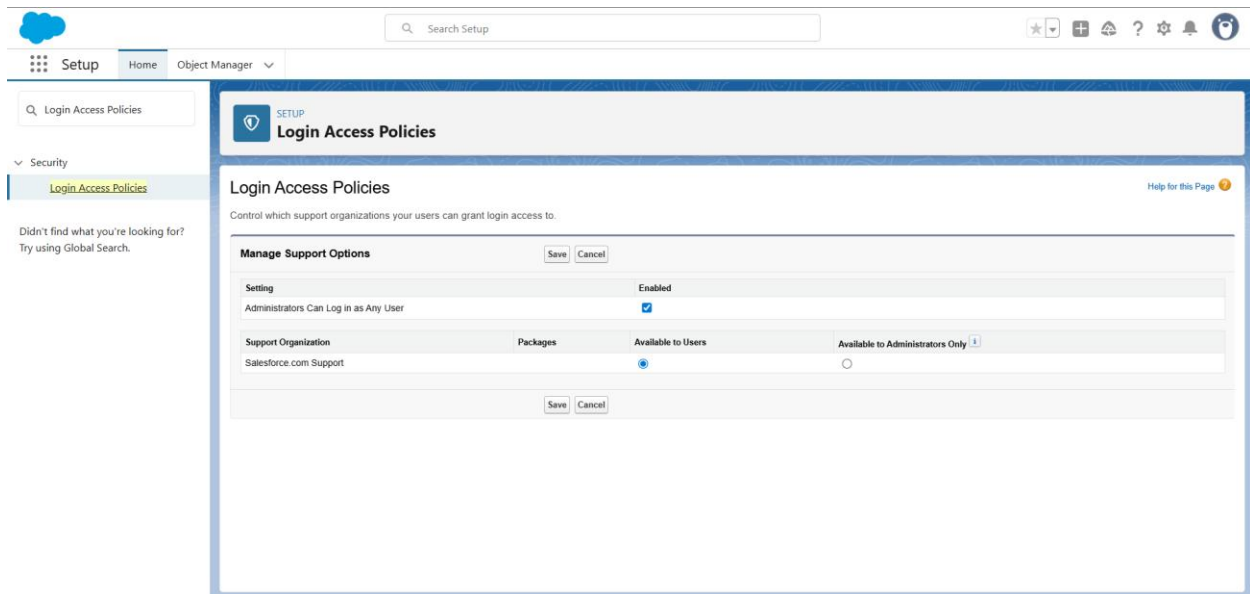
- Admissions users can access all student records to process applications.
- Instructors only see records of students enrolled in their assigned courses.

This prevents unnecessary exposure of sensitive data while enabling collaboration.

## 11. Login Access Policies

- Setup → **Login Access Policies**
- Enabled **Administrators Can Log in as Any User** to simplify troubleshooting and support. For example, the admin can log in as a student to check if course enrollment processes are working correctly.
- Enabled **Salesforce.com Support Login Access** to allow Salesforce support teams to securely access the org in case of technical issues.

This ensures quick issue resolution and strong governance during system operations.



## **12.Developer Org Setup**

- Create Salesforce Developer Edition account.
- Configure Company Profile, Users, Roles, Profiles, Business Hours, and Security settings.
- Enable required features: custom objects, automation, reports.
- Integrate with GitHub/Salesforce CLI for version control.

## **13.Sandbox Usage**

- Use Developer Sandbox for building and testing changes safely.
- Optionally, use Full Sandbox for testing production-level scenarios.
- Always test major changes in a sandbox before deploying to production.

## **14.Deployment Basics**

- Change Sets: Simple point-and-click deployment between orgs.
- Salesforce CLI (SFDX): Advanced deployment with version control and automation.
- GitHub Integration: Track changes, collaborate, and maintain version control. •  
Always document deployment steps and maintain backups