EduTrack CRM – Full Explanation

Phase 1: Problem Understanding & Industry Analysis

Goal: Understand what we're building and why.

1. Requirement Gathering
- Capture student inquiries (web forms, walk-ins, calls).
- Assign inquiries to admission officers.
- Schedule and manage counseling sessions.
- Track enrollments and payment status.
- Generate admissions dashboards.

2. Stakeholder Analysis
- Admin (you): Manages Salesforce setup.
- Admission Officers: Handle leads, counseling sessions, and enrollments.
- Management: Reviews admissions progress with dashboards.
- Students (Prospects): Inquiry initiators (simulated in CRM).

3. Business Process Mapping
Flow: Student Inquiry → Auto-assigned to Admission Officer → Counseling Scheduled → Enrollment Created → Payment Tracked → Reports Generated.

4. Industry-specific Use Case Analysis
In education, institutions must efficiently manage leads, reduce delays in admissions, and improve conversion rates. Tracking inquiries manually causes missed opportunities.

5. AppExchange Exploration
There are education CRM apps (like Education Cloud), but we'll build our own lightweight EduTrack CRM to learn.

Phase 2: Org Setup & Configuration

Goal: Prepare Salesforce environment.

1. Salesforce Edition: Developer Org (free).
2. Company Profile Setup: Add institute info, set currency & timezone.
3. Business Hours & Holidays: Define working hours (9am–5pm), add holidays.
4. User Setup: Create Admission Officers and Management users.
5. Profiles & Roles:
- Admission Officer: Create/edit Students & Counseling Sessions.
- Management: View reports and dashboards.
6. Permission Sets: Give extra access (like Reports) if needed.
7. OWD & Sharing Rules: Students → Private, but visible to Managers.
8. Dev Org Setup: Use free Salesforce org as your sandbox.

Phase 3: Data Modeling & Relationships

Goal: Build data structure.

1. Custom Objects:
- Student__c

- Course__c
- Counseling_Session__c
- Enrollment__c

2. Fields:
- Student: Email, Phone, Interest Level, Status, Preferred Course.
- Course: Duration, Fees.
- Counseling Session: Session Date/Time, Counselor, Status, Notes.
- Enrollment: Enrollment Date, Payment Status.

3. Relationships:
- Student → Course (Lookup).
- Counseling Session → Student (Lookup).
- Enrollment → Student & Course (Lookup).

4. Page Layouts: Add related lists (Counseling, Enrollments).
5. Schema Builder: Show Student linked to Course, Counseling, and Enrollment.

Phase 4: Process Automation (Admin)

Goal: Automate repetitive tasks.

1. Flow 1 – Auto-assign Student to Admission Officer.
2. Flow 2 – Email Reminder when Counseling Session created.
3. Validation Rules: Ensure Student Email is mandatory.
4. Approval Process (Optional): Enrollment above certain fee requires Manager approval.

Phase 5: Apex Programming (Developer)

Goal: Add advanced logic.

1. Apex Class – EnrollmentHandler.cls
- When Student status = Enrolled → auto-create Enrollment.
2. Trigger – StudentTrigger.trigger
- Runs after Student update.
3. Test Class – TestEnrollmentHandler.cls
- Verifies Enrollment is created when Student status is changed to Enrolled.

Phase 6: User Interface Development

Goal: Make it user-friendly.

1. Lightning App Builder: Create “EduTrack CRM” app.
2. Record Pages: Student page shows related Counseling Sessions & Enrollments.
3. Tabs: Add Students, Courses, Counseling Sessions, Enrollments.
4. Home Page Layout: Show admissions dashboard.
5. Utility Bar: Add quick link to “New Student.”

Phase 7: Integration & External Access

Goal: Connect to external systems.

1. Web-to-Lead: Capture Student inquiries from form submissions.
2. Email-to-Case (Optional): Convert emails into Student records.
3. External Services (Optional): Payment API for fee tracking.

Phase 8: Data Management & Deployment

Goal: Manage data & move changes.

1. Data Import Wizard: Import sample Students & Courses.
2. Data Loader: Bulk import large student lists.
3. Duplicate Rules: Prevent duplicate Students.
4. Data Export: Regular backup.
5. GitHub Repo: Store Apex code, docs, screenshots.

Phase 9: Reporting, Dashboards & Security Review

Goal: Monitor admissions & secure data.

1. Reports:
- Admissions Funnel (Student status distribution).
- Officer Performance (Students by Owner).
- Enrollment by Course.

2. Dashboards: Admissions Overview (pie chart + bar chart + line chart).
3. Security: Field-level security for sensitive info.
4. Audit Trail: Track who updated data.

Phase 10: Final Presentation & Demo Day

Goal: Deliver like a real project.

1. Pitch Presentation: Problem → Solution → Features → Benefits.
2. Demo Walkthrough:
- Create Student → Auto-assigned.
- Create Counseling → Email sent.
- Update Student to Enrolled → Enrollment auto-created.
- Show Dashboard.
3. Handoff Documentation: GitHub repo with docs + code.
4. Portfolio Showcase: Add to LinkedIn/GitHub profile.