University Admissions CRM – Full Explanation

Phase 1: Problem Understanding & Industry Analysis

Goal: Understand what we are building and why.

1. Requirement Gathering

Talk to stakeholders: Admissions Office, Faculty Heads, Finance (scholarships), IT team.

Example requirements:

Track all courses offered by the university.

Allow students to submit applications online.

Manage application statuses (Pending, Accepted, Rejected).

Allocate scholarships based on eligibility criteria.

Notify students automatically by email.

Generate reports: Admission statistics, scholarship distribution, course enrollment numbers.

2. Stakeholder Analysis:

Admin: Sets up the system.

Admissions Officer: Reviews applications.

Faculty: Approves some applications if needed.

Finance: Checks scholarships.

Students: Submit applications and check their status.

3.Map the process:

Student applies → Admissions Officer checks → Scholarship eligibility → Faculty approves → Email sent → Enrollment updated

Check existing apps: There are tools out there, but building our own helps us learn and make it simple.

4. Industry-specific Use Case Analysis

Universities need to track multiple courses, scholarships, deadlines, and approvals.

Automation ensures no application is missed, students get timely notifications, and reports are accurate.

5. AppExchange Exploration

Some applications exist for admissions, but building a custom Salesforce solution is useful for learning and flexibility.

Phase 2: Org Setup & Configuration

Goal: Prepare Salesforce environment for development.

Salesforce Edition: Developer Edition org.

Company Profile Setup: Add university name, address, timezone, currency.

Business Hours & Holidays: Define office hours and academic holidays.

Fiscal Year Settings: Standard (Jan–Dec) for tuition revenue reports.

User Setup & Licenses: Create users for Admissions Officer, Faculty, Finance, Student Portal.

Profiles:

Students: Can submit applications.

Admissions Officers: Create and manage applications.

Faculty: Approve applications.

Admin: Full access.

Roles: Hierarchy ensures record visibility rolls up (Admin → Admissions → Faculty).

Permission Sets: Grant special access (e.g., view reports) without changing profiles.

Org-Wide Defaults:

Course: Public Read Only.

Application: Private, visible only to assigned officer and faculty.

Sharing Rules: Optional for cross-officer collaboration.

Login Access Policies: Restrict student portal login hours if needed.

Sandbox Usage & Deployment Basics: Build in sandbox → deploy to production with Change Sets.