Smart Student Enrollment & Progress Tracker

Problem Statement

Currently, the student enrollment process is completely manual. Students have to physically submit forms or email their requests. They cannot track the status of their enrollment, leading to confusion and delays. Faculty members must manually review and approve requests, which is time-consuming. There is also no proper reporting mechanism for administrators to monitor student progress or enrollment statistics.

Phase 1 — Problem Understanding

The first phase focuses on clearly understanding the problem we are solving. We defined the issue, wrote user stories, and drew a simple process flow.

- Problem Statement: Enrollment is manual, students can't track progress, and there is no reporting for Admin.

- User Stories: 1) As a Student, I want to request enrollment in a course so I can participate. 2) As a Faculty member, I want to approve/reject enrollment requests so that only eligible students are enrolled. 3) As an Admin, I want to see reports of student enrollment and progress to monitor performance.

- Process Flow Diagram: Student → Enrollment Request → Faculty Approval → Enrollment Status Updated → Admin Reporting.

- **Requirement Gathering:**
  We began by understanding the current enrollment process at universities. The main issues identified were that enrollment was fully manual, students had no way to track the status of their requests, and faculty had to handle approvals through emails or offline communication. This created confusion, delays, and duplication of work. To resolve this, we gathered requirements from the perspective of all users. Finally, we decided Salesforce automation could simplify and centralize the process.

- **Stakeholder Analysis:**
  The project involves three main stakeholders. Students want an easy way to request enrollment in courses and view their progress. Faculty need a structured method to approve or reject requests without managing everything manually. Admins require access to reports and dashboards to monitor student performance and enrollment trends. By

analyzing these stakeholders, we defined clear roles and responsibilities. This ensured that our solution would be user-focused.

- **Business Process Mapping:**
  We mapped out the entire enrollment process to visualize how information flows. The process starts when a Student submits an enrollment request. It moves to Faculty for approval or rejection. Once approved, the enrollment status is updated to Enrolled. Finally, Admins access this data in reports and dashboards. This clear mapping helped us identify the key objects required — Student, Course, and Enrollment. We used a flow diagram to illustrate this.

- **Industry-specific Use Case Analysis:**
  We studied how real-world universities and institutions handle enrollments. Most rely on either manual paperwork or fragmented systems that do not give students transparency. Our analysis confirmed the need for a digital solution to improve efficiency, reduce errors, and provide visibility. With Salesforce’s CRM and automation features, we could design a solution similar to what many modern universities are adopting. This validated our approach.

- **AppExchange Exploration:**
  Before starting custom development, we explored Salesforce AppExchange for readymade solutions. While there are education management apps available, they were either too complex or not aligned with our specific use case. Many had extra features we didn’t need, which would add unnecessary complexity. After this exploration, we decided to build a custom solution from scratch. This ensured simplicity and full control over functionality.

Verification:

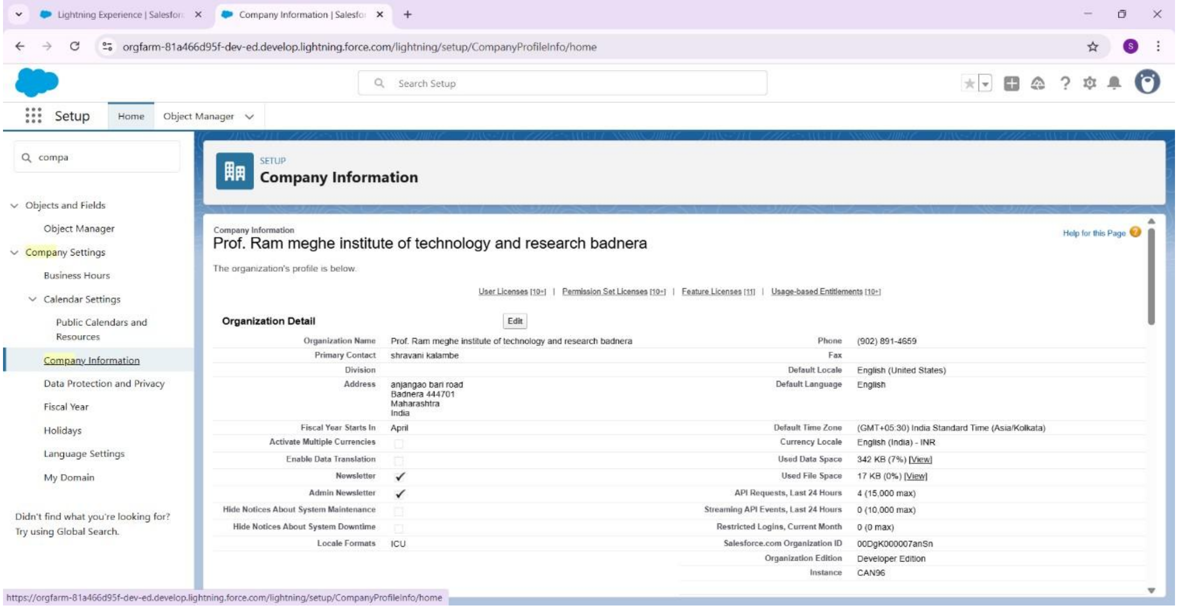
We confirmed that we could explain the problem in two clear sentences and had a process diagram ready. This ensures the team fully understands the goal before starting development.

Phase 2 — Org Setup & Security

The second phase involves preparing the Salesforce org to support our solution. This includes setting up organization details, business hours, holidays, roles, profiles, and security settings.

Salesforce Editions:
Salesforce provides different editions like Essentials, Professional, Enterprise, and Developer. For this project, we selected the **Developer Edition** because it offers all customization features at no cost. This edition allows us to create custom objects, write Apex triggers, build Lightning Components, and configure automation flows.

- **Company Profile Setup** : Configured Company Information: Set organization name to ABC University, timezone to Asia/Kolkata, and currency to INR.


Lightning Experience | Salesfor
Company Information | Salesfor
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Search Setup
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Business Hours
Calendar Settings
Public Calendars and Resources
Company Information
Data Protection and Privacy
Fiscal Year
Holidays
Language Settings
My Domain
Didn't find what you're looking for? Try using Global Search.
SETUP
Help for this Page
Edit
https://orgfarm-81a466d95f-dev-ed.develop.lightning.force.com/lightning/setup/CompanyProfileInfo/home

Company Information

Company Information
Prof. Ram meghe institute of technology and research badnera

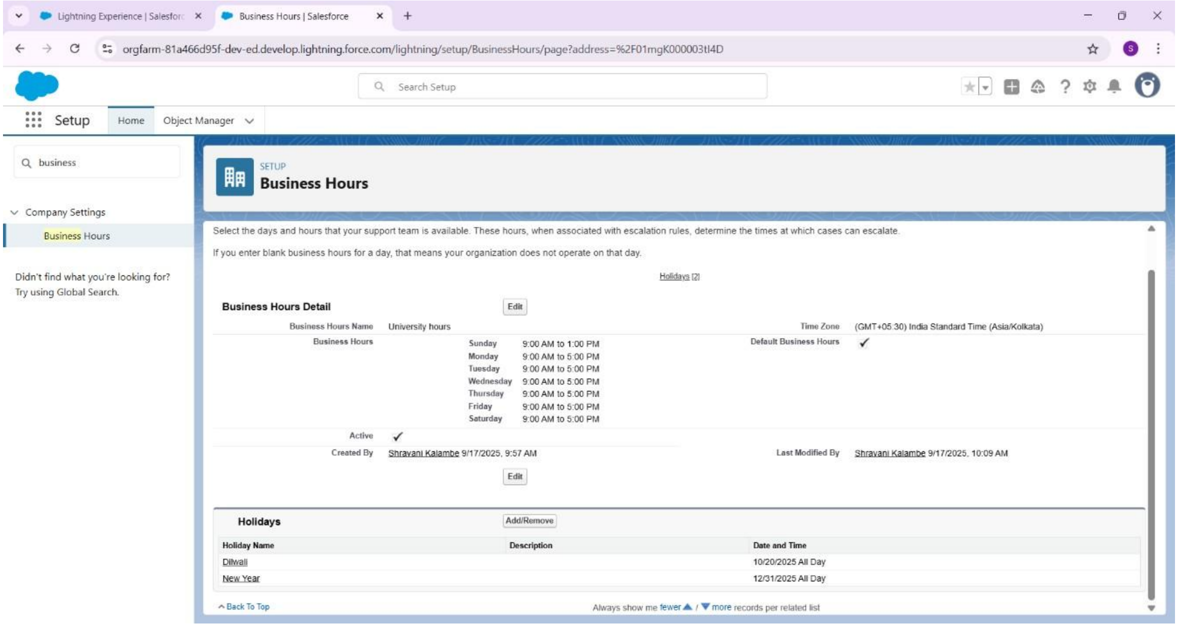
The organization's profile is below.

User Licenses [10+] | Permission Set Licenses [10+] | Feature Licenses [11] | Usage-based Entitlements [10+]

Organization Detail

Organization Name	Prof. Ram meghe institute of technology and research badnera	Phone	(902) 891-4659
Primary Contact	shravani kalambe	Fax	
Division		Default Locale	English (United States)
Address	anjangao bari road Badnera 444701 Maharashtra India	Default Language	English
Fiscal Year Starts In	April	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	□	Currency Locale	English (India) - INR
Enable Data Translation	□	Used Data Space	342 KB (7%) [View]
Newsletter	✓	Used File Space	17 KB (0%) [View]
Admin Newsletter	✓	API Requests, Last 24 Hours	4 (15,000 max)
Hide Notices About System Maintenance	□	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	□	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK000007anSn
		Organization Edition	Developer Edition
		Instance	CAN96

Business Hours & Holidays: To ensure system automations respect working times, we configured Business Hours. We created “University Hours” as Monday to Friday, 9 AM–5 PM. Next, we added two holidays — Diwali and Christmas. These holidays were associated with University Hours so that approval processes and escalation rules would pause during non-working days. This ensures the system operates realistically according to the academic calendar.


Lightning Experience | Salesforce
Business Hours | Salesforce
orgfarm-81a466d95f-dev-ed.develop.lightning.force.com/lightning/setup/BusinessHours/page?address=%2F01mgK000003tI4D
Search Setup
Setup
Home
Object Manager
business
Company Settings
Business Hours
Didn't find what you're looking for?
Try using Global Search.
SETUP
Business Hours

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.

Holidays [2]

Business Hours Detail Edit

Business Hours Name: University hours

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Business Hours:

Sunday	9:00 AM to 1:00 PM
Monday	9:00 AM to 5:00 PM
Tuesday	9:00 AM to 5:00 PM
Wednesday	9:00 AM to 5:00 PM
Thursday	9:00 AM to 5:00 PM
Friday	9:00 AM to 5:00 PM
Saturday	9:00 AM to 5:00 PM

Default Business Hours: ✓

Active: ✓

Created By: Shravani Kalambe 9/17/2025, 9:57 AM

Last Modified By: Shravani Kalambe 9/17/2025, 10:09 AM

Edit

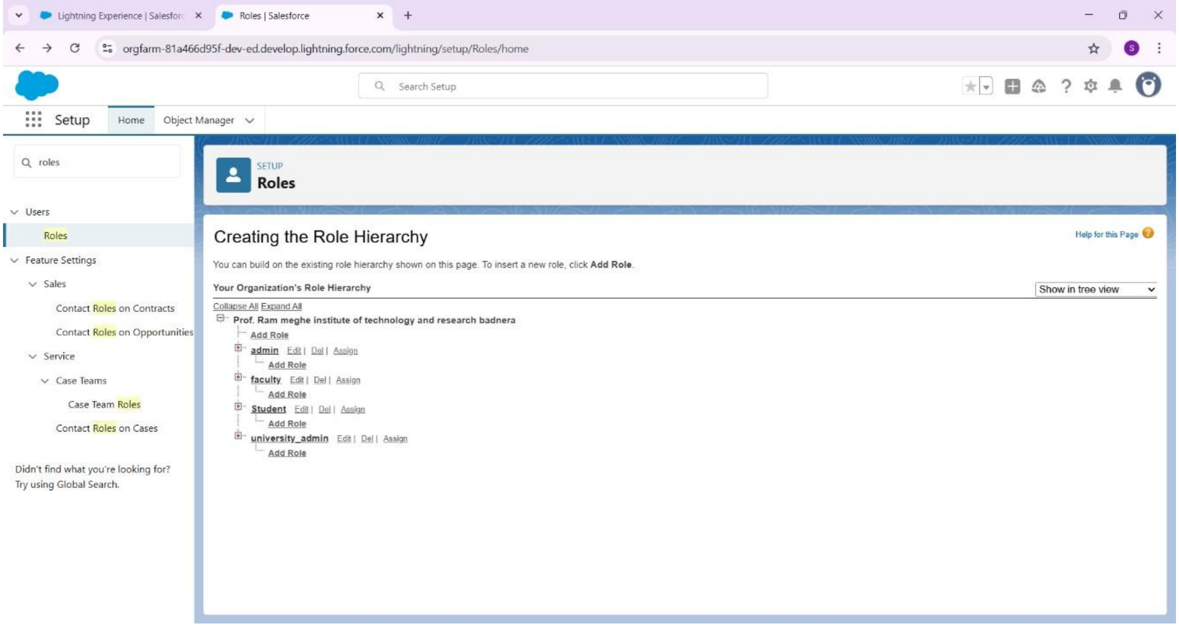
Holidays Add/Remove

Holiday Name	Description	Date and Time
Dilwali		10/20/2025 All Day
New Year		12/31/2025 All Day

^ Back To Top

Always show me fewer ▲ / ▼ more records per related list

Roles: We created sample users to represent real stakeholders. Prof. Rahul was added as a Faculty member with a Salesforce license, which grants full CRM access. Student One was created with a Salesforce Platform license, which provides limited access but is ideal for selfservice students. Defining correct licenses ensures users only consume the necessary features. This step also allowed us to simulate real scenarios by logging in as different roles.Defined Roles: Admin (top level), Faculty (reports to Admin), and Student (reports to Faculty).


Lightning Experience | Salesforce
Roles | Salesforce
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Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Help for this Page

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 Show in tree view

Collapse All Expand All

- Prof. Ram meghe institute of technology and research badnera
  - Add Role
  - admin Edit | Del | Assign
    - Add Role
  - faculty Edit | Del | Assign
    - Add Role
  - Student Edit | Del | Assign
    - Add Role
  - university_admin Edit | Del | Assign
    - Add Role

Profiles: Created Profiles: Cloned Standard User to create Faculty and Student profiles with appropriate permissions.

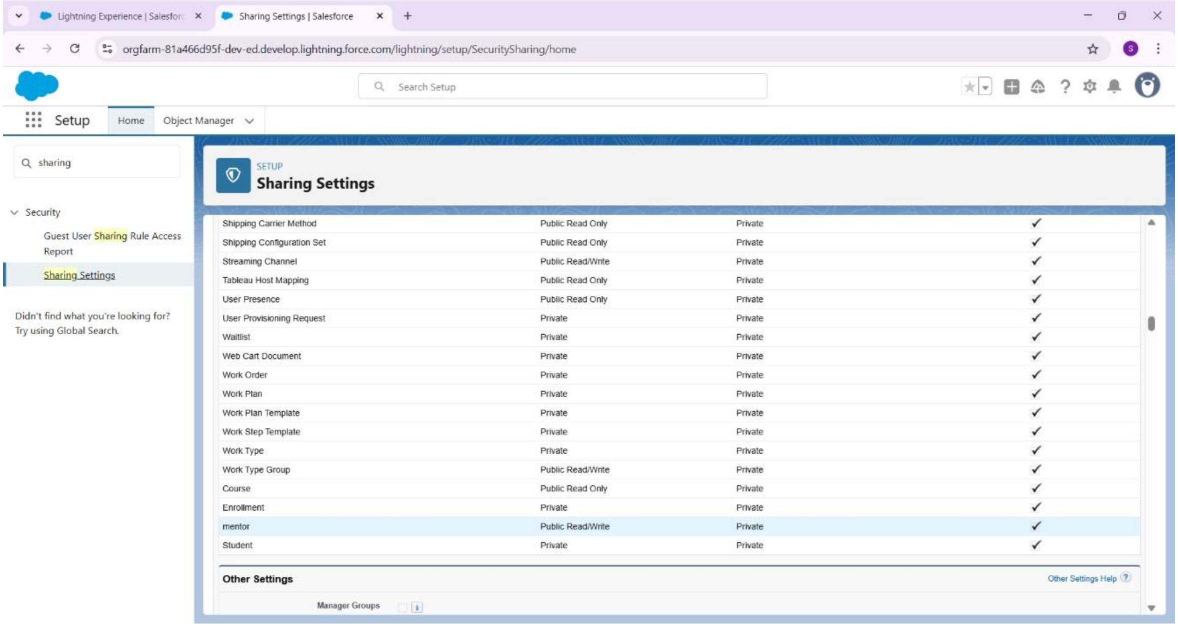
- Configured Sharing Settings: Student__c = Private

OWD (Org-Wide Defaults):

Org-Wide Defaults establish the baseline visibility for all objects. We configured:

- Student__c = Private (a student can only see their own record).
- Course__c = Public Read Only (everyone can view courses).
- Enrollment__c = Controlled by Parent (visibility depends on the linked Student and Course).

This ensures data privacy while maintaining transparency where required.


Lightning Experience | Salesforc
Sharing Settings | Salesforce
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Search Setup
Setup
Home
Object Manager
sharing
Security
Guest User Sharing Rule Access Report
Sharing Settings
Didn't find what you're looking for? Try using Global Search.
SETUP

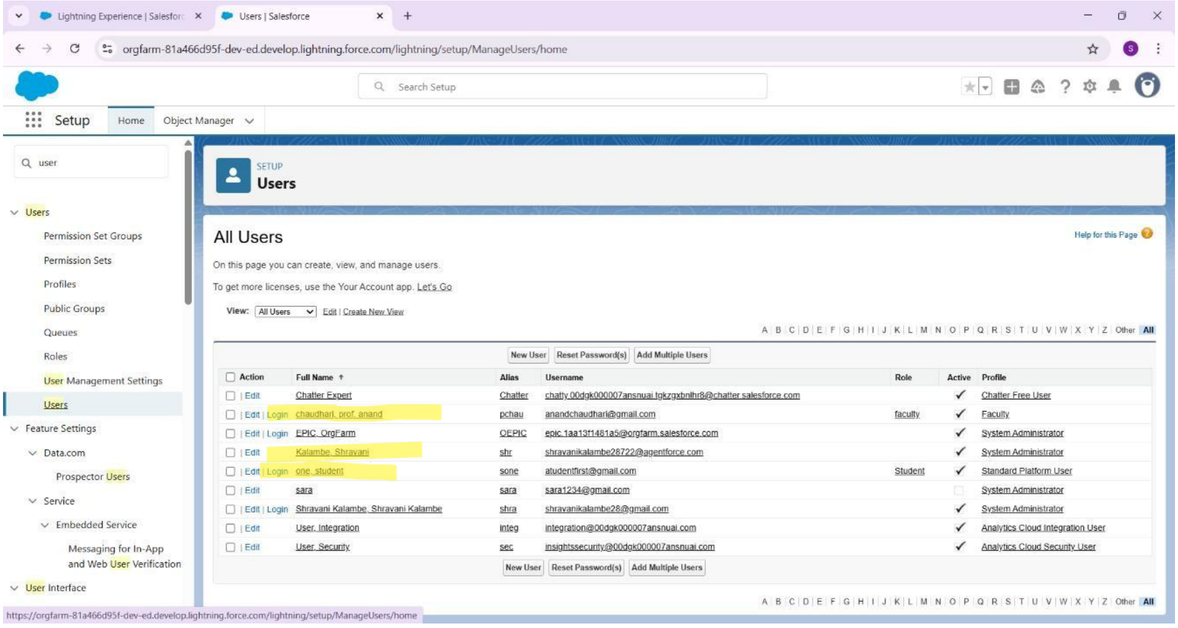
Sharing Settings

Shipping Carrier Method	Public Read Only	Private	✓
Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Course	Public Read Only	Private	✓
Enrollment	Private	Private	✓
mentor	Public Read/Write	Private	✓
Student	Private	Private	✓

Other Settings — Other Settings Help

Manager Groups □

User Setup & Licenses: Created Users: Prof. Rahul (Faculty profile) and Student One (Student profile) with respective roles and licenses.


Lightning Experience | Salesforce
Users | Salesforce
orgfarm-81a466d95f-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home
Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
https://orgfarm-81a466d95f-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

SETUP
Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. Let's Go

View: All Users | Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

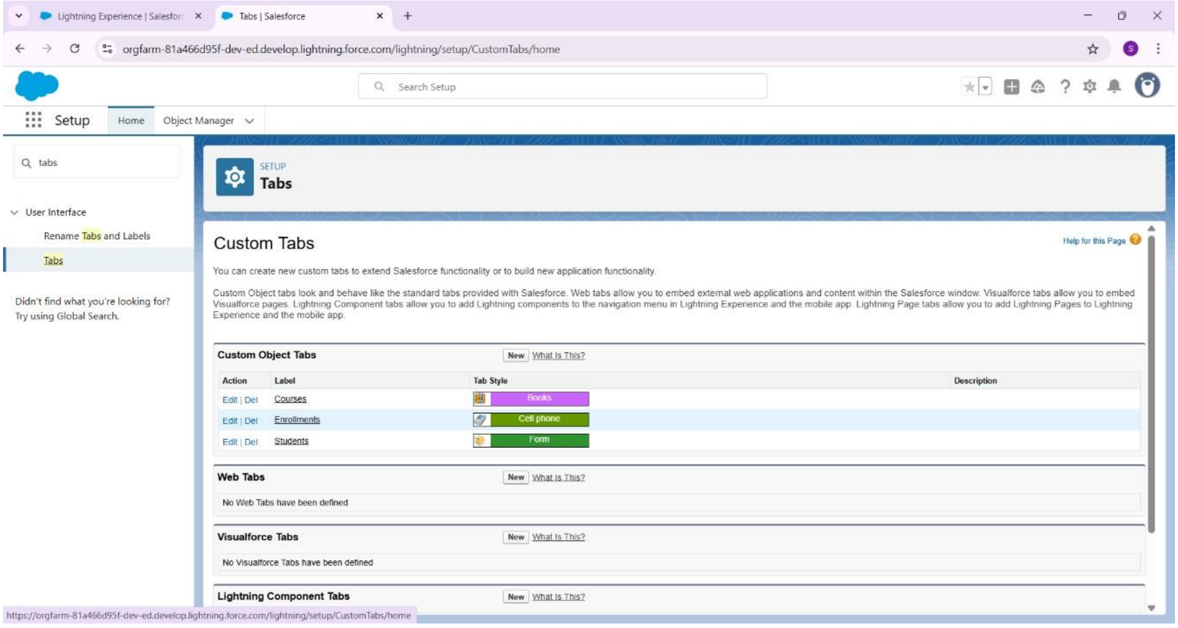
New User | Reset Password(s) | Add Multiple Users

Action	Full Name ↑	Alias	Username	Role	Active	Profile
□ | Edit	Chatter Expert	Chatter	chatty.00dgk000007ansnuai.tgkzgxbnlhr8@chatter.salesforce.com		✓	Chatter Free User
□ | Edit | Login	chaudhari, prof. anand	pchau	anandchaudhari@gmail.com	faculty	✓	Faculty
□ | Edit | Login	EPIC, OrgFarm	OEPIC	epic.1aa13f1481a5@orgfarm.salesforce.com		✓	System Administrator
□ | Edit	Kalambe, Shravani	shr	shravanikalambe28722@agentforce.com		✓	System Administrator
□ | Edit | Login	one, student	sone	atudentfirst@gmail.com	Student	✓	Standard Platform User
□ | Edit	sara	sara	sara1234@gmail.com		□	System Administrator
□ | Edit | Login	Shravani Kalambe, Shravani Kalambe	shra	shravanikalambe28@gmail.com		✓	System Administrator
□ | Edit	User, Integration	integ	integration@00dgk000007ansnuai.com		✓	Analytics Cloud Integration User
□ | Edit	User, Security	sec	insightssecurity@00dgk000007ansnuai.com		✓	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

- Created Custom Tabs: Student, Course, and Enrollment objects now have tabs to allow navigation in the Lightning app.


Lightning Experience | Salesforce
Tabs | Salesforce
orgfarm-81a466d95f-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
https://orgfarm-81a466d95f-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

SETUP
Tabs

Custom Tabs

Help for this Page

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs — New | What Is This?

Action	Label	Tab Style	Description
Edit | Del	Courses	Books	
Edit | Del	Enrollments	Cell phone	
Edit | Del	Students	Form	

Web Tabs — New | What Is This?

No Web Tabs have been defined

Visualforce Tabs — New | What Is This?

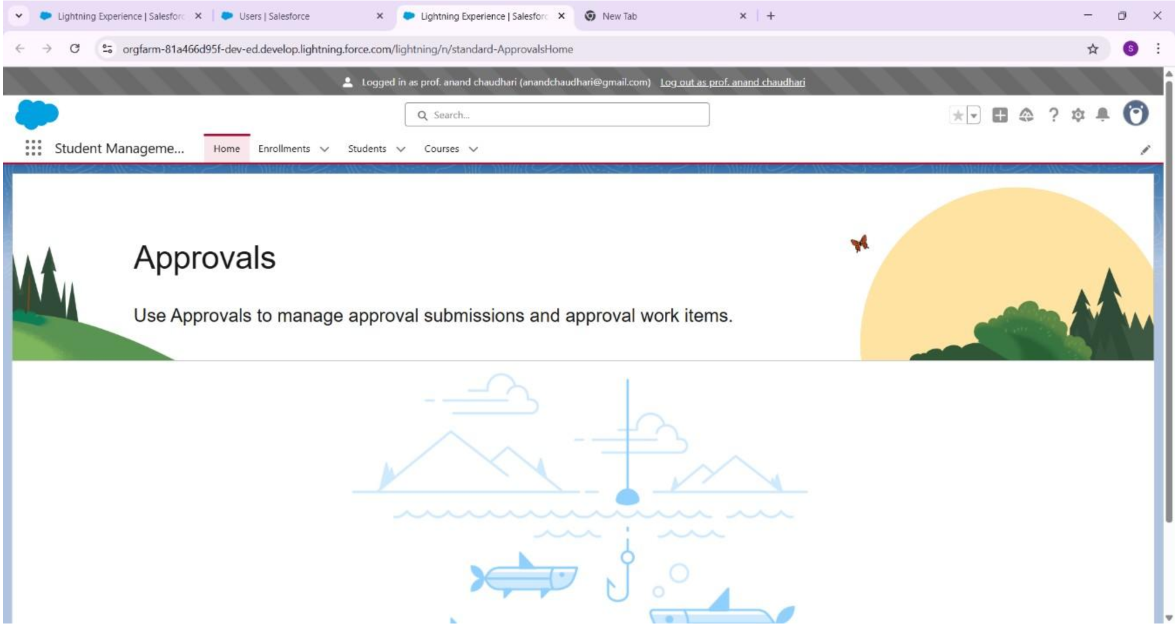
No Visualforce Tabs have been defined

Lightning Component Tabs — New | What Is This?

- Added Tabs to Student Management App: Ensured Students, Courses, and Enrollments are visible to Admin and Faculty.

Login Access Policies:

Salesforce allows admins to log in as other users to test profiles and permissions. We used this feature to verify the experience of both Faculty and Students. Logging in as Prof. Rahul confirmed he could view Courses and Enrollments but not other Students. Logging in as Student One confirmed they only had access to their own data. This final step ensured our security configuration was correct..


Lightning Experience | Salesforce
Users | Salesforce
Lightning Experience | Salesforce
New Tab
orgfarm-81a466d95f-dev-ed.develop.lightning.force.com/lightning/n/standard-ApprovalsHome
Logged in as prof. anand chaudhari (anandchaudhari@gmail.com) Log out as prof. anand chaudhari
Search...
Student Manageme...
Home
Enrollments
Students
Courses

Approvals

Use Approvals to manage approval submissions and approval work items.

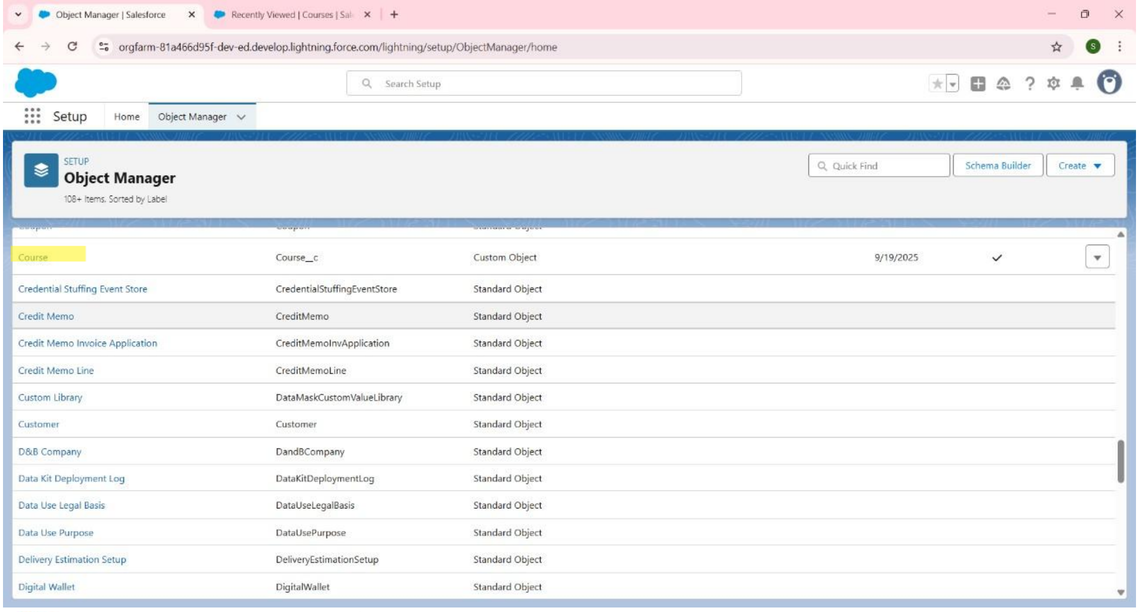
Verification:

Logged in as Faculty and confirmed they could see the Courses and Enrollments tabs but not other students' records. Logged in as Student and confirmed they could only see their own data. This ensured security settings worked as expected.

Phase 3 — Data Modeling & Relationships

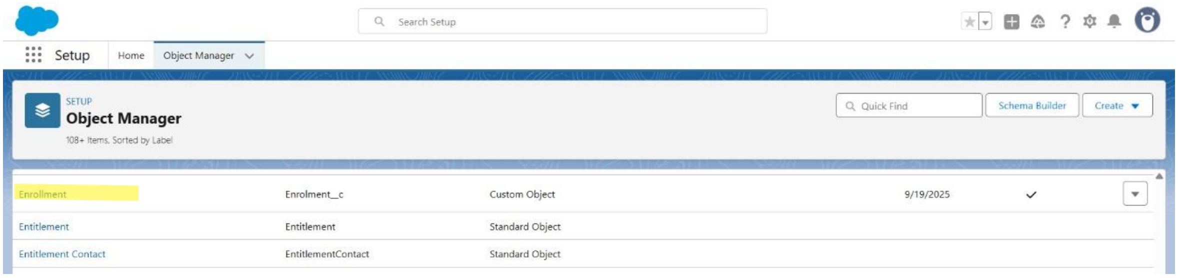
1. Standard & Custom Objects

Information: Objects are database tables.
What We Did: Created 3 custom objects: Student__c, Course__c, Enrollment__c.
Verification: Objects appear in Object Manager.


Object Manager | Salesforce
Recently Viewed | Courses | Sal
orgfarm-81a466d95f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home
Search Setup
Setup
Home
Object Manager
Quick Find
Schema Builder
Create

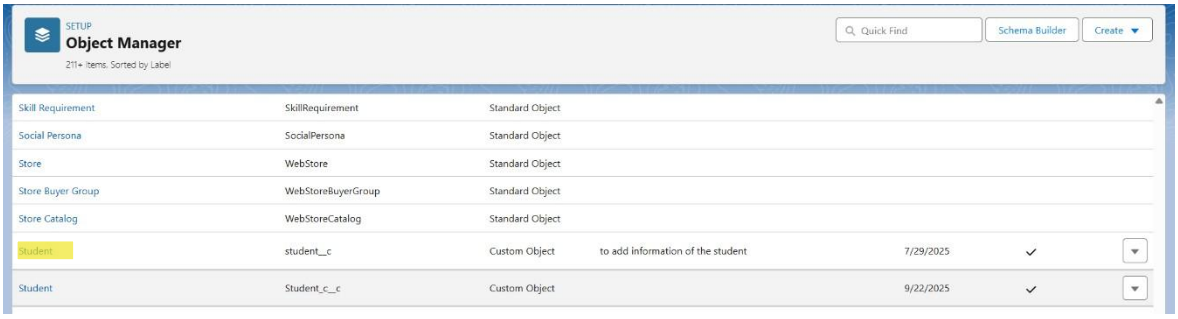
SETUP
Object Manager
108+ Items, Sorted by Label

Course	Course__c	Custom Object	9/19/2025	✓
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object		
Credit Memo	CreditMemo	Standard Object		
Credit Memo Invoice Application	CreditMemoInvApplication	Standard Object		
Credit Memo Line	CreditMemoLine	Standard Object		
Custom Library	DataMaskCustomValueLibrary	Standard Object		
Customer	Customer	Standard Object		
D&B Company	DandBCompany	Standard Object		
Data Kit Deployment Log	DataKitDeploymentLog	Standard Object		
Data Use Legal Basis	DataUseLegalBasis	Standard Object		
Data Use Purpose	DataUsePurpose	Standard Object		
Delivery Estimation Setup	DeliveryEstimationSetup	Standard Object		
Digital Wallet	DigitalWallet	Standard Object		



SETUP
Object Manager
108+ Items, Sorted by Label

Enrollment	Enrolment__c	Custom Object	9/19/2025	✓
Entitlement	Entitlement	Standard Object		
Entitlement Contact	EntitlementContact	Standard Object		



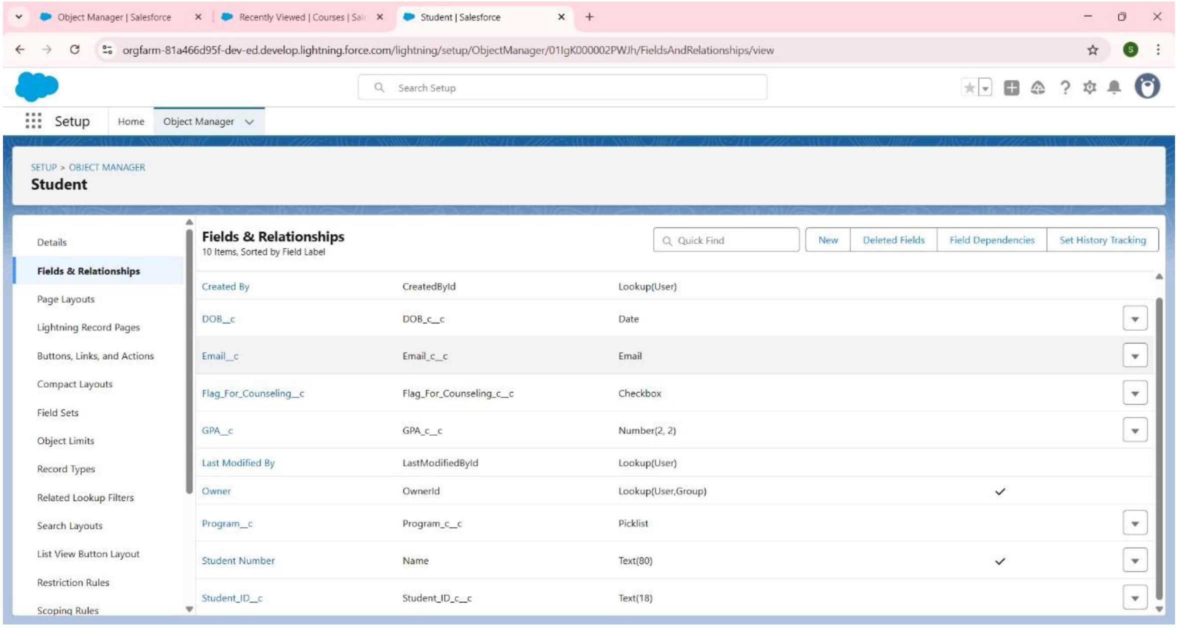
SETUP
Object Manager
211+ Items, Sorted by Label

Skill Requirement	SkillRequirement	Standard Object			
Social Persona	SocialPersona	Standard Object			
Store	WebStore	Standard Object			
Store Buyer Group	WebStoreBuyerGroup	Standard Object			
Store Catalog	WebStoreCatalog	Standard Object			
Student	student__c	Custom Object	to add information of the student	7/29/2025	✓
Student	Student_c__c	Custom Object		9/22/2025	✓

2. Fields

Information: Store attributes of each object.

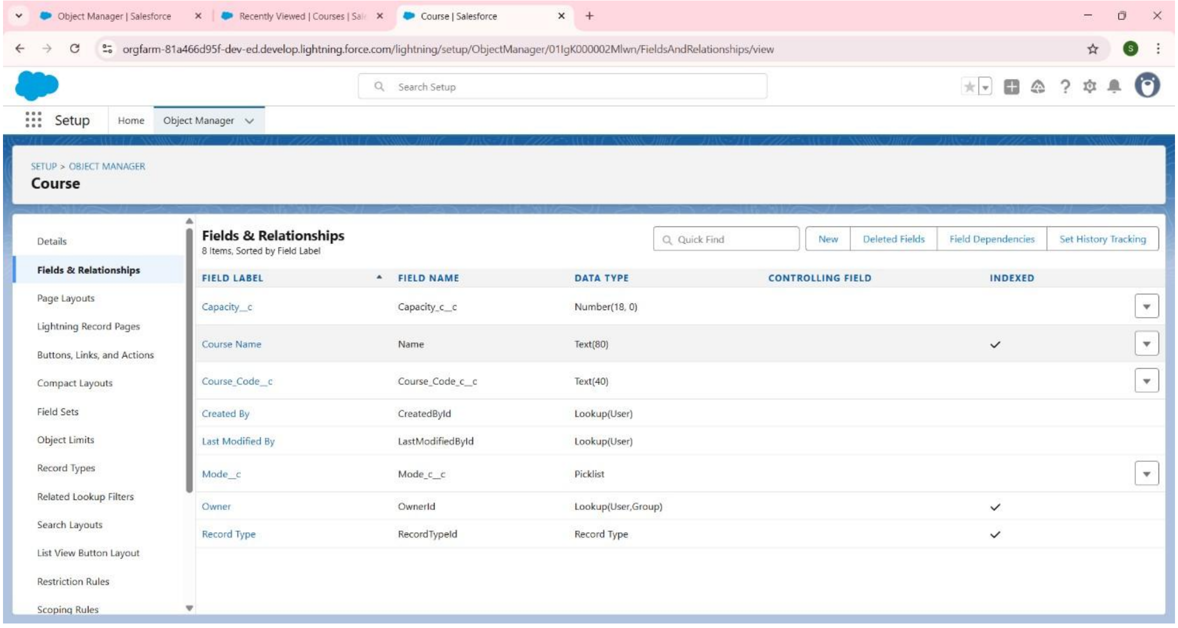
- Student__c → Student_ID, DOB, Program, GPA, Email



Fields & Relationships
10 Items, Sorted by Field Label

Created By	CreatedById	Lookup(User)	
DOB__c	DOB_c__c	Date	
Email__c	Email_c__c	Email	
Flag_For_Counseling__c	Flag_For_Counseling_c__c	Checkbox	
GPA__c	GPA_c__c	Number(2, 2)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	✓
Program__c	Program_c__c	Picklist	
Student Number	Name	Text(80)	✓
Student_ID__c	Student_ID_c__c	Text(18)	

- Course__c → Course_Code, Capacity, Mode.



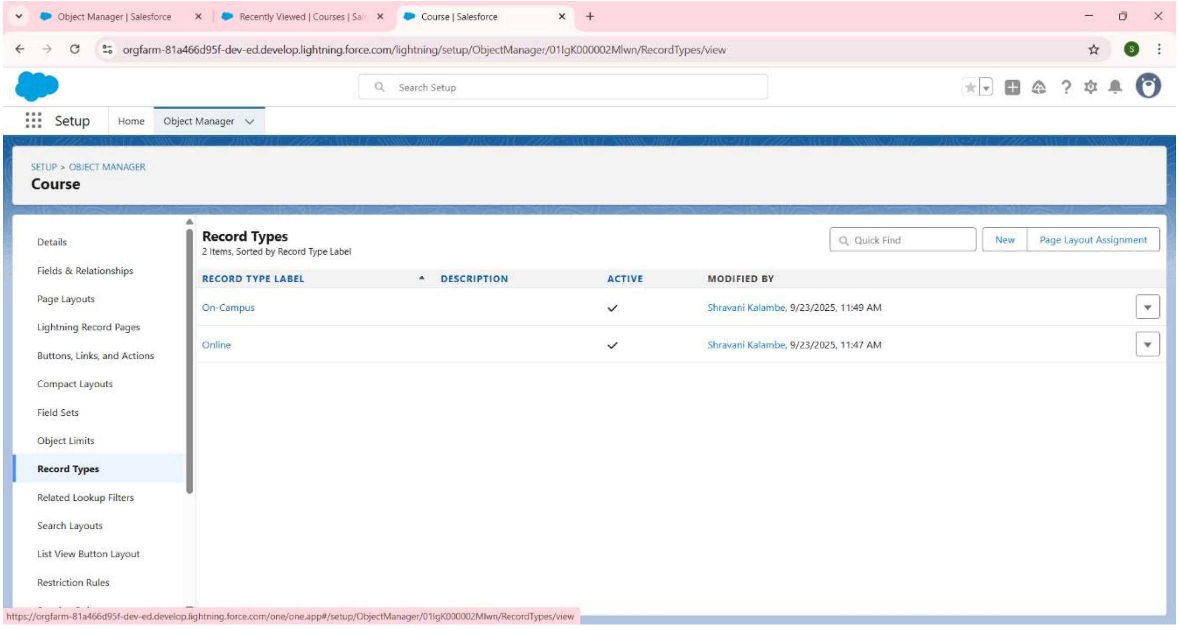
Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Capacity__c	Capacity_c__c	Number(18, 0)		
Course Name	Name	Text(80)		✓
Course_Code__c	Course_Code_c__c	Text(40)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Mode__c	Mode_c__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Record Type	RecordTypeId	Record Type		✓

- Enrollment__c → Status, Request Date, Student__c (lookup), Course__c (lookup).
  Verification: Fields visible on page layouts and records.

3. Record Types

Information: Different business processes per object.
For Course__c → Record Types: Online, On-Campus.
Verification: When creating Course, Salesforce asks for record type → correct layout shown.


Object Manager | Salesforce
Recently Viewed | Courses | Sal
Course | Salesforce
orgfarm-81a466d95f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002MIwn/RecordTypes/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Course
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Quick Find
New
Page Layout Assignment
https://orgfarm-81a466d95f-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01IgK000002MIwn/RecordTypes/view

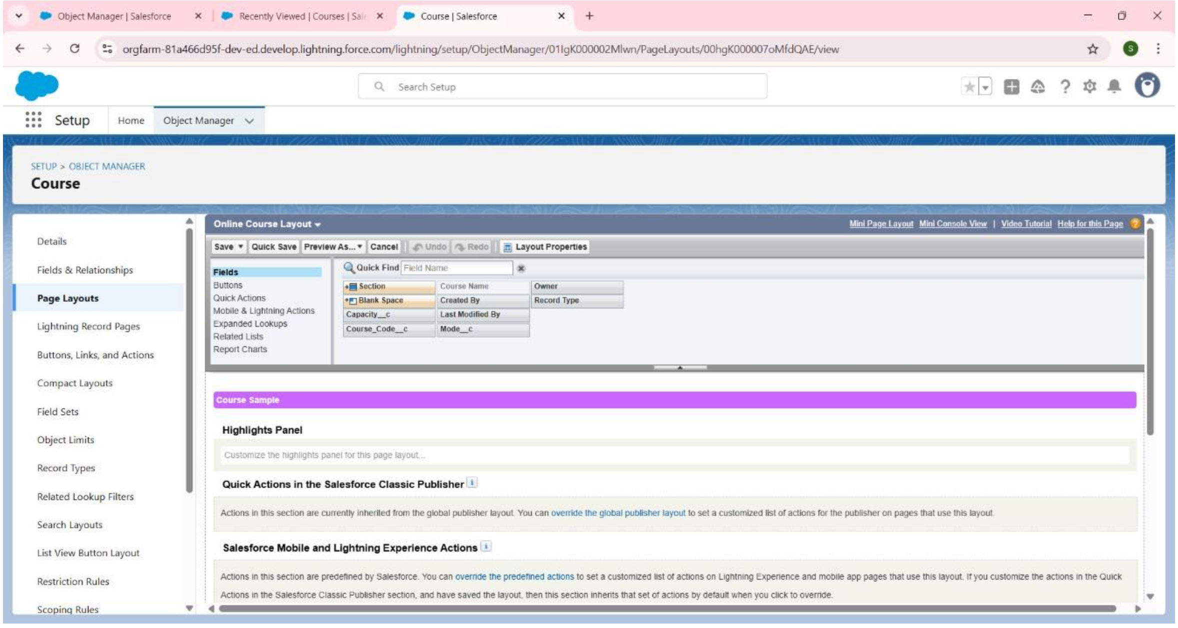
Record Types
2 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
On-Campus		✓	Shravani Kalambe, 9/23/2025, 11:49 AM
Online		✓	Shravani Kalambe, 9/23/2025, 11:47 AM

4. Page Layouts

Information: Define UI for records.

- Online Course Layout → fields like Platform, Meeting Link.
- On-Campus Layout → fields like Classroom, Campus Location. **Verification:** Different layouts show based on record type.



Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

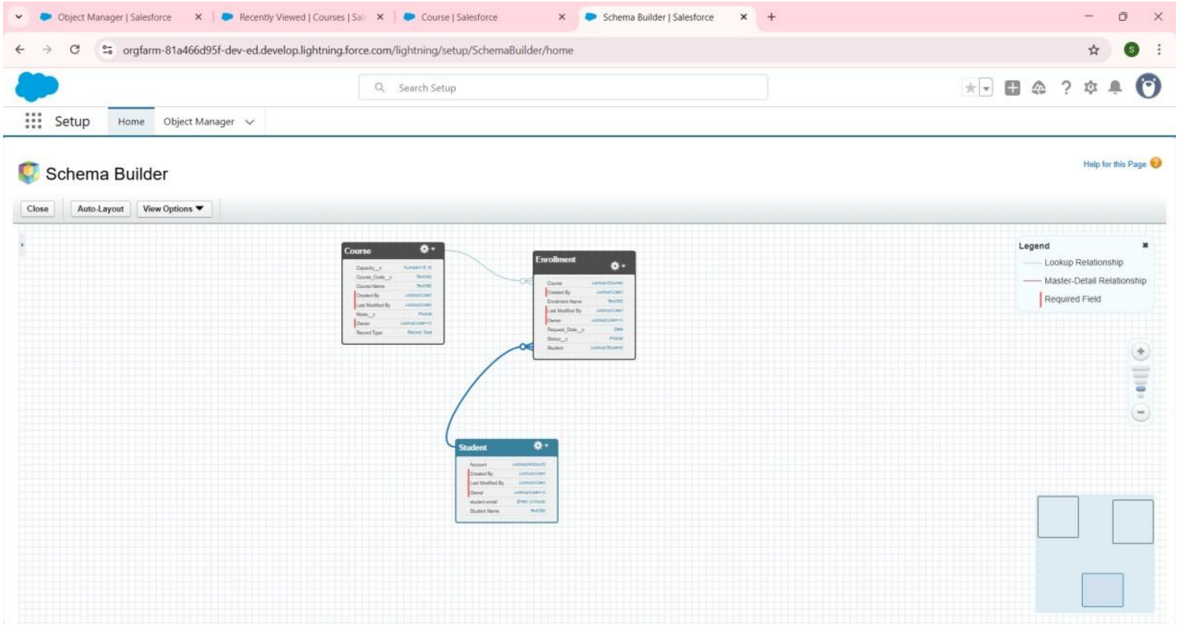
5. Compact Layouts

Information: Show key fields in highlights panel.

Student Compact Layout = Name, Program, GPA.
Verification: Compact layout visible on top of record page.

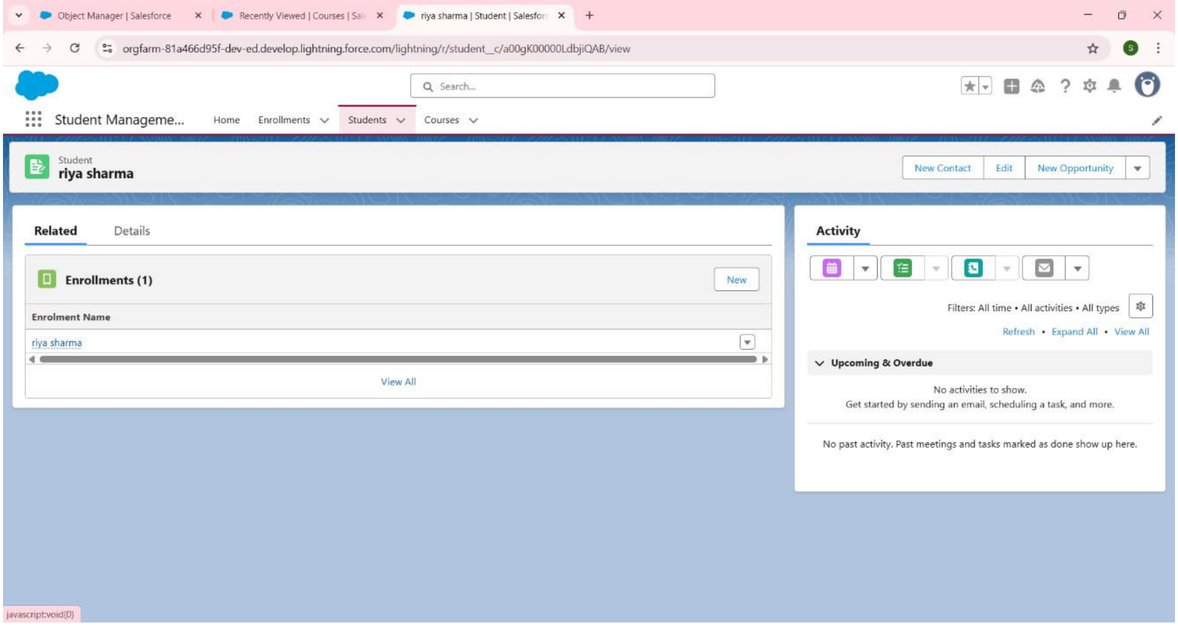
6. Schema Builder

Information: Visual tool to see object relationships.
What We Did: Used Schema Builder to check links between Student, Course, Enrolment.
Verification: Diagram shows Enrollment linked to Student & Course.



7. Lookup vs Master-Detail vs Hierarchical

Information: Relationship types.
 Used **Lookup** relationships for Enrollment → Student and Enrollment → Course. **Verification:** Enrollment records display in related lists on Student & Course.


Object Manager | Salesforce
Recently Viewed | Courses | Sal
riya sharma | Student | Salesforc
orgfarm-81a466d95f-dev-ed.develop.lightning.force.com/lightning/r/student__c/a00gK00000LdbjiQAB/view
Search...
Student Manageme...
Home
Enrollments
Students
Courses
New Contact
Edit
New Opportunity
Related
Details
New
View All
Activity
Filters: All time • All activities • All types
Refresh • Expand All • View All
Upcoming & Overdue
javascript:void(0)

Student
riya sharma

Enrollments (1)

Enrolment Name
riya sharma

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.

8. Junction Objects

Information: Object to connect 2 objects in many-to-many. Enrollment__c acts as junction between Student & Course.

Verification: One Student can enroll in many Courses; One Course can have many Students.

9. External Objects

Information: Used for connecting external DBs. Not used in this project. **Verification:** N/A.

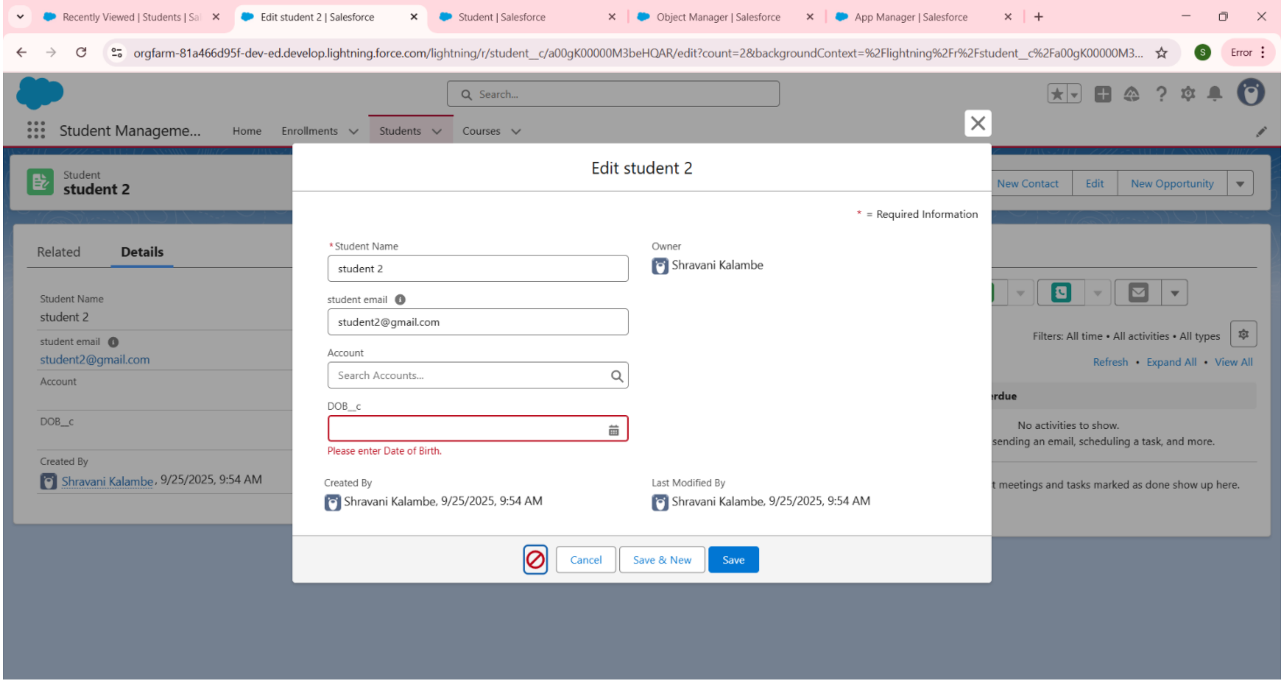
End of Phase 3 Verification:

- Created Student record.
- Created Course record.
- Created Enrollment linking Student + Course.
- Related lists working. • Record Types tested.

Phase 4: Process Automation (Admin)

1. Validation Rules

We implemented a **Validation Rule** on the Student__c object to ensure that the **Date of Birth (DOB__c)** is mandatory. This helps maintain accurate student records and prevents saving incomplete data. The rule uses the formula ISBLANK(DOB__c) and shows an error message if left empty. This runs automatically when a record is created or edited.


Recently Viewed | Students | Sa
Edit student 2 | Salesforce
Student | Salesforce
Object Manager | Salesforce
App Manager | Salesforce
orgfarm-81a466d95f-dev-ed.develop.lightning.force.com/lightning/r/student__c/a00gK00000M3beHQAR/edit?count=2&backgroundContext=%2Flightning%2Fr%2Fstudent__c%2Fa00gK00000M3...
Error
Search...
Student Manageme...
Home
Enrollments
Students
Courses
Student
student 2
New Contact
Edit
New Opportunity
Related
Details
Filters: All time • All activities • All types
Refresh • Expand All • View All
No activities to show.
Cancel
Save & New
Save

Edit student 2

* = Required Information

*Student Name: student 2

student email: student2@gmail.com

Account: Search Accounts...

DOB__c:

Please enter Date of Birth.

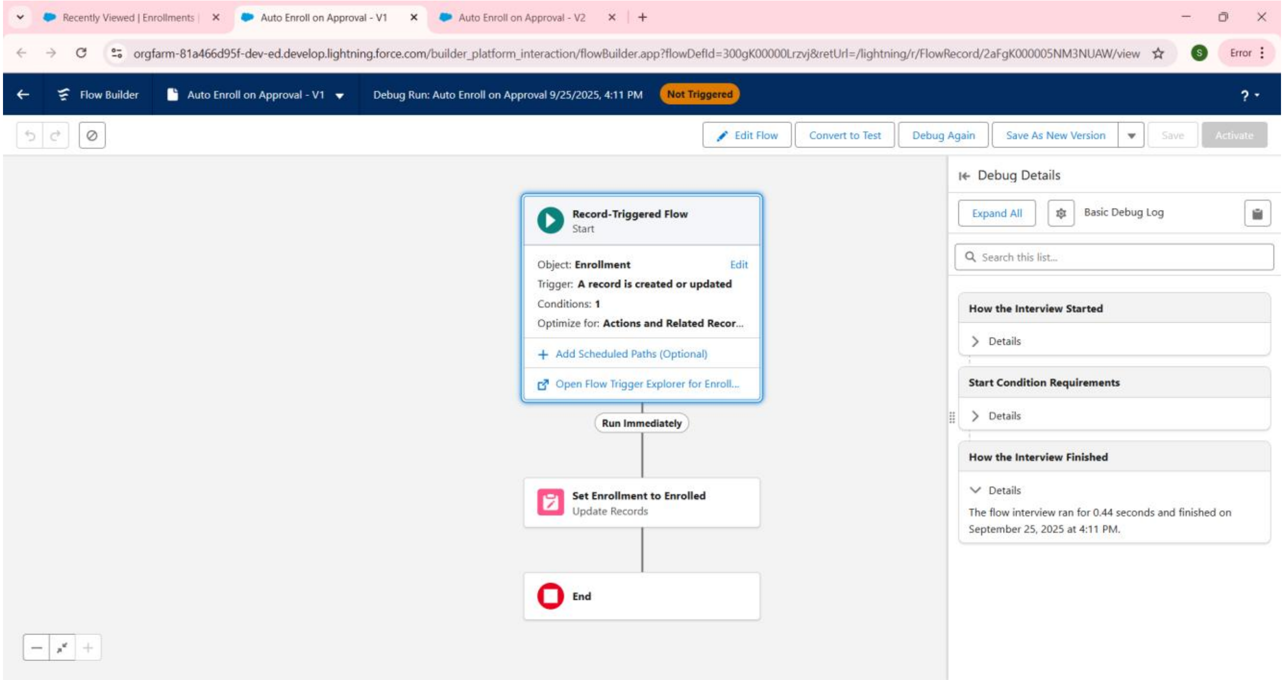
Owner: Shravani Kalambe

Created By: Shravani Kalambe, 9/25/2025, 9:54 AM

Last Modified By: Shravani Kalambe, 9/25/2025, 9:54 AM

2. Workflow Rules

Although **Workflow Rules** are legacy tools, we planned to use modern alternatives like **Flows**. Traditionally, workflow rules help automate actions like field updates, email alerts, or tasks based on record criteria. In our project, we replaced workflows with **Record-Triggered Flows** and **Approval Processes** for better flexibility. If needed, simple workflows can still be added for quick alerts or updates.



orgfarm-81a466d95f-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowDefId=300gK00000Lrzvj&retUrl=/lightning/r/FlowRecord/2aFgK000005NM3NUAW/view

Debug Run: Auto Enroll on Approval 9/25/2025, 4:11 PM Not Triggered

Record-Triggered Flow
Start

Object: Enrollment
Trigger: A record is created or updated
Conditions: 1
Optimize for: Actions and Related Recor...

Run Immediately

Set Enrollment to Enrolled
Update Records

End

Debug Details

How the Interview Finished

The flow interview ran for 0.44 seconds and finished on September 25, 2025 at 4:11 PM.

Recently Viewed | Enrollments |
Auto Enroll on Approval - V1
Auto Enroll on Approval - V2
Error
Flow Builder
Auto Enroll on Approval - V1
Edit Flow
Convert to Test
Debug Again
Save As New Version
Save
Activate
Edit
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Enroll...
Expand All
Basic Debug Log
Search this list...
How the Interview Started
Details
Start Condition Requirements
Details
Details

3. Process Builder

Salesforce is phasing out **Process Builder** in Favor of **Flows**, so we did not use it directly. Instead, all process automation (like auto-enrolment after approval) was implemented via **Flows**. Process Builder is useful for multi-step logic and was previously used for approval actions, field updates, and related record changes. In our solution, its functionality is fully replaced by Flow Builder.

4. Approval Process

An **Approval Process** was created for Enrollment__c to manage enrollment requests. When the status is set to "Requested", it gets routed to a user in the **faculty role** for review. Upon approval, the status automatically updates to "Approved"; if rejected, it changes to "Rejected". This ensures formal authorization before enrolling a student into a course.

5. Flow Builder

We used a **Record-Triggered Flow** on Enrollment__c to detect when a record is approved. It automatically updates the status to **"Enrolled"** if the previous status wasn't already approved. Flow Builder replaced older tools like Workflow and Process Builder. More Flow types (Screen, Auto-launched, Scheduled) can be added later for GPA recalculation or student re-evaluation.

6. Email Alerts

While not implemented directly yet, **Email Alerts** can be used to notify students or faculty. For example, an alert can be sent to a student when their enrollment is approved or rejected. This can be set up within an **Approval Process** or **Flow** using predefined templates and recipients. It enhances communication without manual effort.

7. Field Updates

We used **Field Updates** as part of the Approval Process to change the Status__c field. On **final approval**, the status is updated to "Approved", and on **rejection**, it's set to "Rejected". This is a key part of automating the enrolment workflow and ensures the record reflects the latest state of the approval lifecycle.

8. Tasks

Although not implemented yet, **Tasks** can be auto-created using Flows to assign follow-up actions. For example, if a student's GPA drops below 2.0, a task could be assigned to a counsellor to intervene. Tasks help ensure accountability and follow-through on critical actions without manual assignment.

9. Custom Notifications

Custom Notifications can be configured via **Flows** to notify users inside the Salesforce UI or mobile app. We can notify students or faculty when key events occur — like successful enrollment or when GPA triggers a counselling flag. These are more modern than email and appear directly in the Salesforce bell icon.