**Admissions-Elevate-CRM Project – Full Explanation**

# Phase 1: Problem Understanding & Industry Analysis

## 1. Requirement Gathering

* + Track prospective students from their first inquiry through to the final admission decision.
  + Manage a formal, multi-stage application review process (e.g., Submitted, Under Review, Accepted).
  + Automate key communications, such as sending an email to confirm an application has been received.
  + Provide a central place to view all applicant data and related documents.

## 2. Stakeholder Analysis

* **Admissions Director (Manager):** Needs to monitor application volumes and team performance through reports and dashboards.
* **Admissions Officers (End Users):** Need an efficient system to manage their assigned applicants and review application details.
* **Faculty Reviewers (Specialized Users):** Need limited access to only see and provide feedback on applications assigned to them.

## 3. Business Process Mapping

* **Current Process:** A manual system using spreadsheets to track applicants and email to communicate. This is slow, prone to data entry errors, and provides no clear visibility into the admissions pipeline.
* **Future Process:** A prospective student (Lead) is captured from the university website. When they apply, an Application record is created. This record moves through a structured review process, automatically notifying the applicant of status changes.

## 4. Industry-specific Use Case Analysis

* In higher education, application deadlines are strict, and different academic programs often have unique requirements. The system must be able to manage these complexities and ensure all required documents are submitted and verified.

## 5. AppExchange Exploration

* Researched form-building tools like **FormAssembly** and document generation apps like **Conga**.
* **Decision:** To ensure the project is completely **cost-free**, all functionality will be built using native Salesforce features.

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# Phase 2: Org Setup & Configuration

1. **Salesforce Editions**

○ A free **Developer Edition Org** has been created and is the active environment for all development.

## 2. Company Profile Setup

* The university's core information, including name, address, default time zone, and primary language, has been configured in Setup > Company Information.

## 3. Business Hours & Holidays

* The admissions office's standard operating hours (e.g., 9:00 AM - 5:00 PM, Monday-Friday) and key university holidays have been set.

1. **Fiscal Year Settings**

○ A **Standard Fiscal Year** beginning in January has been configured for reporting purposes..

1. **User Setup & Licenses**

○ Example user records for the primary roles (Admissions Director, Admissions Officer) have been created and assigned **Salesforce** user licenses..

## 6. Profiles

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* A custom profile named **"Admissions Officer"** has been cloned from a base profile to provide specific, limited access to the system. The System Administrator profile is assigned to the Director.

7. **Roles**

○ A role hierarchy has been established with the Admissions Director at the top and Admissions Officers reporting to them to ensure proper data visibility for reporting.

## 8. OWD (Org-Wide Defaults)

* The Organization-Wide Default for the custom Application object has been set to **Private** to ensure applicant data is secure and confidential by default.

1. **Sharing Rules**

* No sharing rules have been created yet. They will be added in a later phase if specific users need access to records they do not own.

1. **Login Access Policies**

* The default login and password policies for the org have been reviewed and confirmed.

1. **Dev Org Setup**

* The Developer Org has been created and is fully configured.

## 12. Deployment Basics

* The Developer Org is connected to a VS Code project. All configurations from Phase 1 and 2 have been successfully retrieved and committed to a public GitHub repository for version control