**STREAMLINING COLLEGE ADMISSIONS WITH SALESFORCE: A PROCESS AUTOMATION AND EFFICIENCY SOLUTION**

by

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in fulfillment of the requirements for GRAD 695 of the

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**1. Introduction**

* 1. **Purpose**

The Salesforce College Admissions System streamlines the application process, centralizes communication, and automates decision-making and onboarding tasks, resulting in greater efficiency and a better experience for the applicant, admission team and the decision teams.

* 1. **Scope**

The project focuses on the stages from initial applicant interest to enrollment. It includes applicant data management, approval workflows, communication tracking, enrollment task creation and student onboarding.

* 1. **Definitions, Acronyms, and Abbreviations**
* **Applicant:** A prospective student who has initiated the application process.
* **Contact:** An individual in the Salesforce system. Can represent applicants, alumni, staff, etc. For this project, an Applicant is linked to a Contact.
* **Decision Committee:** The group responsible for reviewing and making decisions on applications.
* **Decision Committee Head:** The individual who leads the Decision Committee and has final approval authority.
* **Admission Team:** The staff responsible for onboarding tasks after an applicant is approved.
* **Salesforce Admin:** The person responsible for maintaining and configuring the Salesforce system.
* **Student:** An Applicant who has been accepted and whose “Student” record has been created within Salesforce by converting from Applicant object.
  1. **Overview**

The system leverages Salesforce's standard objects (Contact, Task, Activity) and custom objects (Applicant, Student) tailored to our specific admissions process. It utilizes Flows for automation, Apex for custom logic, Approval process feature for Approval flows, Email Templates, and leverages the Activity component for communication tracking.

**2. System Requirements**

**2.1 Functional Requirements**

* + **Applicant Data Capture:** System will have forms to collect essential applicant information (name, contact details, academic background, etc.)
  + **Contact Linking:** If a Contact exists, associate the applicant record to avoid duplicates. If not exists a associated contact record will be created through automation.
  + **Automated Approval Workflow:** Status change to Qualification and Applicant Fee field checked to True will trigger approval requests sent to the appropriate Decision Committee members upon clicking on Submit for Approval button.
  + **Onboarding Task Creation:** Upon approval, a task is generated for the Admissions Team with relevant applicant data.
  + **Student Record Generation:** Task completion triggers automatic creation of a student record, populating key fields.
  + **Approval Request Emails:** The system will automatically send email notifications when an application requires approval, including relevant details to the designated Decision Committee members.
  + **Applicant Decision Emails:** The system will send automated decision update emails (approved/rejected) to applicants.
  + **Welcome Email:** Upon the creation of a Student record, the system will send a welcome email containing onboarding information or next steps.

**2.2 Non-Functional Requirements**

* + **Usability:** Intuitive interface for admissions staff and clear instructions for applicants, if applicable.
  + **Data Integrity:** Validation rules to ensure data accuracy and prevent invalid entries.
  + **Security:** Adherence to Salesforce security best practices, and appropriate access controls.

**2.3 Performance Requirements**

* + Page load times of under 3 seconds for key screens.
  + Ability to concurrently support 200 number of admissions staffs.
  + Approval notifications sent within 5 minutes of status change.

**2.4 Logical Database Requirements**

* + **Contact Object:**Standard Salesforce fields.
  + **Applicant Object:**Custom fields to capture Applicant Name, Application Date, Program of Interest, Test Scores, contact details and associated Contact and Student records with feasibility to upload supported files as attachments.
  + **Student Object:**Similar fields as Applicant Object with a Student ID populated as per the University policies as a Automated Number.
  1. **Software System Attributes**
     1. **Reliability**

System must be available during admissions office working hours with minimal downtime.

* + 1. **Availability**

The core function of the system should be available 24/7 to accommodate applications.

* + 1. **Security**

Adherence to Salesforce security best practices (user profiles, roles, queues, permission sets, sharing rules).

* + 1. **Maintainability**

Clear documentation of custom code and configurations. Use of declarative tools (Flows) where possible for easy updates by admins.

* + 1. **Portability**

Since it's Salesforce, the core system is cloud-based.

**3. Software Specifications**

|  |  |  |
| --- | --- | --- |
| Category | Specification | Notes |
| Salesforce | Edition: Professional, Enterprise, Unlimited, etc. | Important for features and limits |
| Operating System (Client) | Windows 10+, macOS, etc. | Where users access Salesforce |
| Web Browsers | Chrome, Firefox, Edge (versions supported by Salesforce) | Salesforce compatibility |
| Custom Development | Apex Classes: <br> \* TaskCreationTrigger <br> \* TaskCreationTriggerTest | Trigger created to automated to check “Admitted” field to True and create related Task to Admission Team. |
| Frontend | Lightning Experience | As we are using the standard UI in most objects |
| Integrations | DataLoader | To mass import or export records |

**Table 1: Software Specifications**

**4. System Design**

**4.1 Architecture**

 The system is built on the Salesforce platform utilizing a Model-View-Controller (MVC) architecture. Salesforce objects like Contact, Task, Activity form the Model, Visualforce pages or Lightning components form the View, and Apex code serves as the Controller.

A diagram of a standard controller

Description automatically generated

**Figure 1: Salesforce MVC Architecture**

**4.2 Object Diagrams (or Data Model)**

A screenshot of a computer screen

Description automatically generated

**Figure 2: Data Model**

**4.3 Use Cases & Diagrams**

Below are the main use cases along with their main flow, alternate flow, and exception flow and their diagrams.

* **4.3.1 Use Case 1:** Create Applicant Profile
  + - **Main Flow:** Support team accesses the system and creates a new applicant profile manually. Support team enters applicant's personal details and academic history into the system. Support team uploads required documents on behalf of the applicant.
    - **Alternate Flow:** If the support team encounters any discrepancies or missing information during profile creation, they request additional details from the applicant via email or phone.
    - **Exception Flow:** If there are technical issues with the system, the support team logs the issue and follows up with technical support for resolution.

A diagram of a person with text

Description automatically generated

**Figure 3: Use Case 1**

* **4.3.2 Use Case 2:** Review Application
  + - **Main Flow:** Reviewer accesses the system and navigates to the list of pending applications. Reviewer selects an application to review. Reviewer evaluates applicant details and documents uploaded by the support team, leaving comments and feedback as necessary. Reviewer marks the application as complete.
    - **Alternate Flow:** If the reviewer requires additional information from the applicant, they communicate with the student by clicking on the “Email” field to request the necessary details.
    - **Exception Flow:** If the reviewer encounters technical issues while reviewing the application, they report the issue to technical support for resolution.

A diagram of a person

Description automatically generated

**Figure 4: Use Case 2**

* **4.3.3 Use Case 3:** Committee Decision Making
  + - **Main Flow:** Admission committee members access the system and view a list of reviewed applications. Committee members discuss and evaluate applications. Committee members make decisions (approve, reject, or request further review) on applications. System updates application status, accordingly, and an email will be triggered to the applicant.
    - **Alternate Flow:** If committee members require additional information or clarification on an application, they communicate with the support team to request further review before deciding.
    - **Exception Flow:** If the committee member encounters technical issues while reviewing the application, they report the issue to technical support for resolution.

A diagram of a person with a stick figure

Description automatically generated

**Figure 5: Use Case 3**

**4.4 Sequence Diagram**

A diagram of a person's process

Description automatically generated

**Figure 6: Sequence Diagram**

**5. Trigger Code & Test Class**

Below is the Trigger Code for marking the “Admitted” field on Applicant Record to True after successfully marking a Task status as Completed and this in turn triggers a Flow to create a “Student” object record.

**A screenshot of a computer

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**A screenshot of a computer

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**6. User Interface**

**6.1 Login Screen**

A screenshot of a computer

Description automatically generated

**6.2 Applications App Home Page**

**A screenshot of a computer

Description automatically generated**

**6.3 Applicant Record Creation Form**

A screenshot of a computer

Description automatically generated

**6.4 Saved Applicant Record**

A screenshot of a computer

Description automatically generated

**6.5 Notes & Attachments Upload Related List Interface**

A screenshot of a computer

Description automatically generated

**6.6 Applicant Record with Notes and Approval History Related Lists**

A screenshot of a phone

Description automatically generated

A screenshot of a computer

Description automatically generated

**6.7 Onboards Task Record Auto Created on Approved Applicant**

A screenshot of a computer

Description automatically generated

**6.8 Applicant Record with Student Record Auto Populated after Task Completion**

A screenshot of a computer

Description automatically generated

**6.9 Student Record with Student ID Auto Populated after Task Completion**

A screenshot of a computer

Description automatically generated

**6.10 Automated Mail After Initial Approval Request**

A screenshot of a computer

Description automatically generated

**6.11 Automated Mail After Final Committee Decision Approved**

A black background with white text

Description automatically generated

**6.12 Error – Duplicate Mail**

A screenshot of a computer error message

Description automatically generated

**6.13 Error – Task Validation Rules**

A red and blue rectangular object with white text

Description automatically generated

**6.14 Automated Mail After Student Record Creation**

A screenshot of a computer

Description automatically generated

**6.15 Approval Process Screenshot**

**A screenshot of a computer

Description automatically generated**

**6.16 Role Hierarchy Setup Configuration**

**A screenshot of a computer

Description automatically generated**

**6.17 Flow For Triggering Contact Creation**

**A screenshot of a record

Description automatically generated**

**6.18 Flow For Triggering Student Creation**

**A screenshot of a computer

Description automatically generated**

**6.19 Flow For Triggering Welcome Letter**

**A screenshot of a flowchart

Description automatically generated**

**7. System Testing**

* **Testing Approach:** Unit testing of Apex code. User Acceptance Testing (UAT) performed by admissions staff ( logged in as Decision Committee, DC Head and Admission Staff ) users to validate functionality against requirements.
* **Test Cases (Appendix):** Refer to the appendix for a sample of the test cases.

**8. Ethical and Societal Effect**

**8.1 Data Privacy:**

* + **User Permissions:**

Object-level permissions control which users can create, read, update, and delete (CRUD) records for each object (Contact, Applicant, etc.). Profile and Permission Sets manage permissions in groups for easier assignment to users based on their role (Admissions Staff, Decision Committee Head, etc.).

* + **Field-Level Security:**

Restrict visibility and editability of specific fields on an object based on a user's profile. For example, certain sensitive fields like Applicant SSN, ID on the Applicant object may be hidden from general staff but visible to those with specific permissions.

* + **Record-Level Sharing:**

Organization-Wide Defaults (OWD) Set the baseline level of access to records across the entire Salesforce instance (usually set to Private, sometimes Public Read Only). Marking Committee Members role as reporting to Committee Head helps the head to access all the records of this team members. It also restricts members of Decision Committee to not be able to view each other’s records without being shared by the owner.

* + **Login Controls:**

Session settings control session duration and timeouts for inactivity. IP restrictions limit access to specific IP ranges if your users always log in from on-campus, for instance. Two-factor authentication (highly recommended) adds an extra layer of security.

**8.2 Fairness:**

* **Auditability:** Salesforce records can help audit the process to identify gaps in the process or if any implicit bias arises in real-world use, allowing for adjustments using Salesforce Reports & Dashboards.

**9. Conclusion(s)**

* **Streamlined Admission Process Flow**:

The admission process flow adheres to university standards, ensuring smooth progression without delays, ultimately aiming to yield better results.

* **Enhanced Communication Pipeline**:

The project implements improved communication channels with applicants, potentially leading to higher acceptance rates and increased satisfaction among applicants.

* **Future Improvements for Student Services**:
  + Building on current developments, future enhancements could include features for students to register for courses, access fee information, and track communications with the University.
  + Professors could also benefit from the project by having the ability to track student grades, further enhancing the project's functionality and utility.

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**11. Appendices**

The following are the appendices.

**11.1 Test Cases:**

***User Login and Application Security***

|  |  |  |  |
| --- | --- | --- | --- |
| **Test Case Number** | TC\_001 | **Revision** | Rev. 1 |
| **Author** | Goutham Bommu | **Date Conducted** | Mar 30, 2024 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Test Conductor** | Goutham Bommu | **Customer Representative** | Dr. Abrar Qureshi |
| **Description** | This test-case tests the application security and user login functionality. The related use case for this Test case is UAT\_01. | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Pre-Test Setup :**  i. Ensure that the user has internet connectivity. | | |  |
|  | | |  |
| **Use Case** | UAT\_01 | **Flow** | Main Flow |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **User Action** |  | **Expected Results** | **Pass/Fail** | **Comments** |
| **1** | An admin user logs in with valid user ID and Password. | •  •  • | Home page is displayed.  Able to access Application App from the App Launcher.  Also has access to setup and all other pre-existing salesforce functionalities. | Pass |  |
| **2** | An Admission team user logs in with  valid user ID and Password. | •  • | Home page is displayed.  Able to access only the Application App from the App Launcher. | Pass | A normal user only has access to Application App. |
| **3** | A Decision Committee user logs in with valid user ID and Password. | •  •  • | Home page is displayed.  Able to access the Application App from the App Launcher.  Able to view approval requests in his queue. | Pass | DC team user will have access to submitted approval requests. |
| **4** | All User tried to log out and tried to access the application features and pages. | • | User is presented with a login page. | Pass |  |

|  |
| --- |
| **Post Conditions –**   1. User logs out and access to all the sections of the salesforce app is revoked. |

***Applicant Record Creation***

|  |  |  |  |
| --- | --- | --- | --- |
| **Test Case Number** | TC\_002 | **Revision** | Rev. 1 |
| **Author** | Goutham Bommu | **Date Conducted** | Mar 24, 2024 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Test Conductor** | Goutham Bommu | **Customer Representative** | Dr. Abrar Qureshi |
| **Description** | This test-case tests the ability to create Applicant record for the “Admission Team” user profile. The related use case for this Test case is UAT\_02. | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Pre-Test Setup :**   1. Ensure that the user has access to internet. 2. Ensure that Admission Team profile user logins to the salesforce app. | | |  |
|  | | |  |
| **Use Case** | UAT\_02 | **Flow** | Main Flow |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **User Action** |  | **Expected Results** | **Pass/Fail** | **Comments** |
| **1** | An admission team user logs in with valid user ID and Password. | •  • | Home page is displayed.  Able to access Applicant Object. | Pass |  |
| **2** | User clicks on New Button in applicant record. | • | User presented with applicant creation tab with all the fields in the object. | Pass | An admission team user has access to create applicant records. |
| **3** | User tries to save the newly typed record. | • | Validation rules are displayed if required fields are not populated. | Pass | Error will be shown if user tries to save a record without populating required fields |
| **4** | User tries to save the record with all required fields populated. | • | Validation rule fired if email entered is a duplicate. | Pass | Validation rule “ Duplicate Email” will be displayed if entered email is already exists for other applicant records to avoid duplicates. |
| **5** | User tries to save the record with all required fields populated and no duplicate mail. | • | Record is saved to the Applicant object. | Pass |  |
| **6** | User clicks on Submit for approval. | • | Record is submitted for approval. | Pass | Records is submitted for approval if “Applicant fee” check box is True. Will displayed error otherwise. |

|  |
| --- |
| **Post Conditions :**   1. User is moved back to the applicant object list. 2. User can see approval request as “Submitted” in the respective applicants related approval history section. |

***Applicant Record Initial Approval Flow***

|  |  |  |  |
| --- | --- | --- | --- |
| **Test Case Number** | TC\_003 | **Revision** | Rev. 1 |
| **Author** | Goutham Bommu | **Date Conducted** | Mar 25, 2024 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Test Conductor** | Goutham Bommu | **Customer Representative** | Dr. Abrar Qureshi |
| **Description** | This test-case tests the ability to Approve Applicant record for the “Decision Committee” user profile. The related use case for this Test case is UAT\_03. | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Pre-Test Setup :**   1. Ensure that the user has access to internet. 2. Ensure that Decision Committee profile user logins to the salesforce app. | | |  |
|  | | |  |
| **Use Case** | UAT\_03 | **Flow** | Main Flow |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **User Action** |  | **Expected Results** | **Pass/Fail** | **Comments** |
| **1** | A Decision Committee team user logs in with valid user ID and Password. | •  •  • | Home page is displayed.  Able to access Applicant Object.  Able to view approval requests on the applicant object. | Pass |  |
| **2** | User clicks on Approve button in applicant record. | • | Applicants record first level approval status is marked as Approved. | Pass | A Decision team user has access to approve applicant records in the first level. |
| **3** | User tries to reject the applicant record. | • | Applicant record is marked as rejected. An email is sent to approval submitted for reverification. | Pass | Reject applicant records will be unlocked for admission team to edit and resubmit for approval. |

|  |
| --- |
| **Post Conditions :**   1. User is moved back to the applicant approval list. 2. User can see approval request as “Approved” and sent to the committee head for final approval. |

***Decision Committee Head Approval Flow and Task Automation***

|  |  |  |  |
| --- | --- | --- | --- |
| **Test Case Number** | TC\_004 | **Revision** | Rev. 1 |
| **Author** | Goutham Bommu | **Date Conducted** | Mar 25, 2024 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Test Conductor** | Goutham Bommu | **Customer Representative** | Dr. Abrar Qureshi |
| **Description** | This test-case tests the ability to Approve Applicant record for the “Decision Committee Head” Queue members. The related use case for this Test case is UAT\_03. | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Pre-Test Setup :**   1. Ensure that the user has access to internet. 2. Ensure that Decision Committee Head user logins to the salesforce app. | | |  |
|  | | |  |
| **Use Case** | UAT\_03 | **Flow** | Main Flow |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **User Action** |  | **Expected Results** | **Pass/Fail** | **Comments** |
| **1** | A Decision Committee Head user logs in with valid user ID and Password. | •  •  • | Home page is displayed.  Able to access Applicant Object.  Able to view approval requests on the applicant object. | Pass |  |
| **2** | User clicks on Approve button in applicant second level approval request. | •    •  • | Applicants record is marked as Decision Approved.  Approval Mail is triggered to the applicant mail.  Task record is created and is assigned to the admission team for student onboarding process. | Pass | A Decision committee head has access to approve applicant records in the final level. |
| **3** | User tries to reject the applicant record. | • | Applicant record is marked as rejected. An email is sent to approval submitter for reverification. | Pass | Reject applicant records will be unlocked for admission team to edit and resubmit for approval. |

|  |
| --- |
| **Post Conditions :**   1. User is moved back to the applicant approval list. 2. User can see approval request as “Approved” and the task created for admission team. |

***Onboarding Task and Student record creation***

|  |  |  |  |
| --- | --- | --- | --- |
| **Test Case Number** | TC\_004 | **Revision** | Rev. 1 |
| **Author** | Goutham Bommu | **Date Conducted** | Mar 25, 2024 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Test Conductor** | Goutham Bommu | **Customer Representative** | Dr. Abrar Qureshi |
| **Description** | This test-case tests the ability to Approve Applicant record for the “Decision Committee Head” Queue members. The related use case for this Test case is UAT\_03. | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Pre-Test Setup :**   1. Ensure that the user has access to internet. 2. Ensure that Decision Committee Head user logins to the salesforce app. | | |  |
|  | | |  |
| **Use Case** | UAT\_03 | **Flow** | Main Flow |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **User Action** |  | **Expected Results** | **Pass/Fail** | **Comments** |
| **1** | Admission team user logs in to the Salesforce application with valid credentials. | • | Home page is displayed. | Pass |  |
| **2** | Navigate to the approved applicant record. Open the associated task record. | • | Able to open task and view all fields. | Pass | A Decision committee head has access to approve applicant records in the final level. |
| **3** | Fill in all required details for the Task Record. Communicate with user if additional documents are needed. | • | Able to communicate with applicant using Activity hub. | Pass |  |
| **4** | Mark the Admission Fee and Onboarding Activities fields as True. | • | Fields are marked as True. | Pass |  |
| **5** | Mark the status as Complete. | • | Task status changed to completed. | Pass |  |
| **6** | Log out from the Salesforce application. | • | User logs out. | Pass |  |

|  |
| --- |
| **Post Conditions :**   1. User is moved back to the applicant approval list. 2. A Student record is created with the Applicant details through automation and a student ID is auto generated as per the formula. 3. Student will get welcome mail and his credentials. |

**11.2 Tables and Figures**

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Figure 5 : Use Case 3 ...................................................................................................................... 13

Figure 6 : Sequence Diagram ……………………….............................................................................. 14