

The EdTech Enrollment Automation project was a multi-phased initiative to streamline student admissions and automate organizational processes within Salesforce. Across seven phases, the project covered foundational security, intelligent automation, custom user interface design, robust backend logic, precise data management, and actionable reporting to address enrollment needs from start to finish.phase.

Problem Statement An EdTech startup struggles with missed follow-ups and slow student enrollment due to manual lead tracking. This project uses Salesforce CRM to automate lead assignment, follow-up tasks, and reporting—streamlining the enrollment process and improving counselor performance.

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

The EdTech startup receives student inquiries through its website and social media campaigns. These inquiries need to be captured in Salesforce and followed up by counselors. The current manual process leads to missed follow-ups and poor visibility into counselor performance.

Key Requirements:

- Capture student inquiries as Leads.
- Assign counselors based on region or course interest.
- Automate follow-up tasks and email alerts.
- Track lead conversion and counselor performance.
- Prevent duplicate student entries.

Stakeholder Analysis

Stakeholder	Role	Needs
Admin	Configures and manages Salesforce	Clean data, automation, visibility
Counselor	Follows up with student leads	Timely reminders, student info
Student	Submits inquiry	Fast response, smooth enrollment
Manager	Oversees team performance	Dashboards, conversion metrics

Business Process Mapping

Enrollment Flow:

- Student submits inquiry → Lead created in Salesforce
 - Lead assigned to counselor → Follow-up task auto-created
 - Counselor contacts student → Lead converted to Student
 - Enrollment record created → Tracked in reports
- This flow will be automated using Process Builder or Flow Builder and supported by validation rules and dashboards.

Industry-Specific Use Case Analysis

EdTech Challenges:

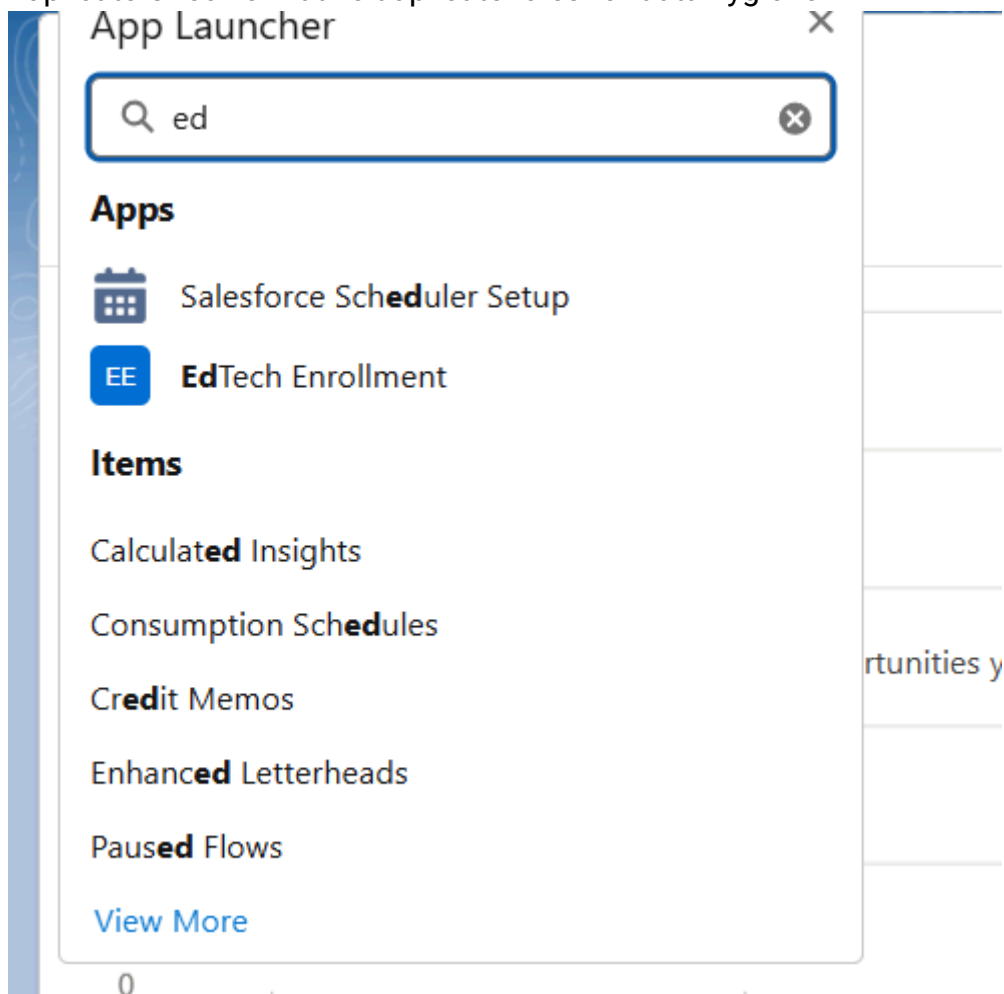
- High inquiry volume during admission cycles
- Multiple courses and counselors across regions
- Need for personalized and timely follow-ups

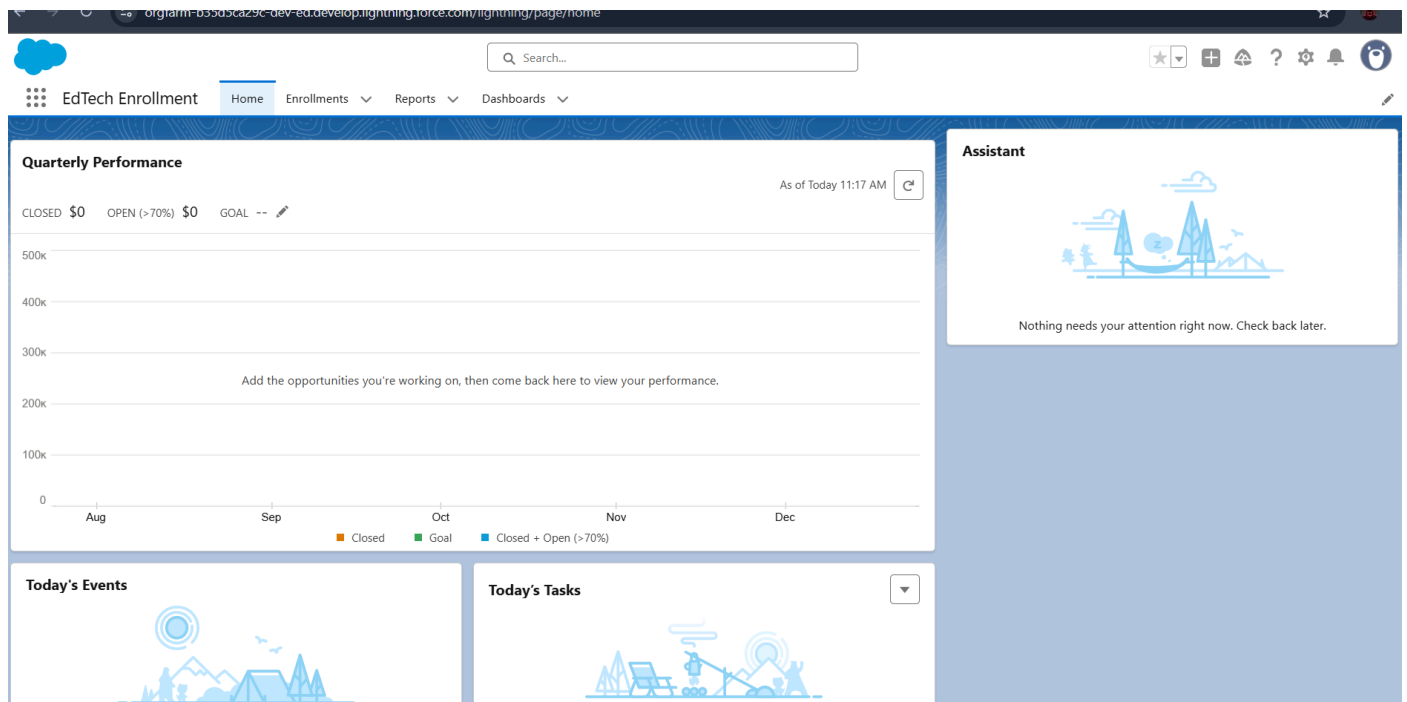
Data privacy and access control for student records
Salesforce offers scalable solutions for these challenges through automation, role-based access, and reporting.

AppExchange Exploration (Optional)

Potential tools to explore:

FormAssembly or Google Forms integration for lead capture
Enrollment management apps for advanced workflows
Duplicate Check or native duplicate rules for data hygiene





Phase 2: Org Setup and Security Configuration

The foundation focused on secure and efficient management of the Enrollment object in Salesforce. Key measures included:

Configuring company information, time zone, fiscal year, and business hours.phase-2.pdf

Defining a custom Enrollment object with fields for student, program, status, counselor, dates, and comments.phase-2.pdf

Creating a detailed role hierarchy (Admin, Counselor, Student) and modular profiles with tailored access. Field-level and organization-wide defaults ensured privacy and compliance.phase-2.pdf

Implementing strict validation rules (e.g., no past enrollment dates, mandatory program selection) and IP/login restrictions for governance.phase-2.pdf



SETUP

Company Information

Company Information

EdTech Academy

[Help for this Page](#)

The organization's profile is below.

[User Licenses \(10+\)](#) | [Permission Set Licenses \(10+\)](#) | [Feature Licenses \(11\)](#) | [Usage-based Entitlements \(10+\)](#)

Organization Detail

[Edit](#)

Organization Name	EdTech Academy	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	United States	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	424 KB (8%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	48 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgL000007SpI7
		Organization Edition	Developer Edition
		Instance	CAN98
Created By	OrgFarm EPIC , 7/17/2025, 11:57 AM		
	Modified By	Parth Khare , 9/13/2025, 5:18 AM	

Fields & Relationships

15 Items, Sorted by Field Label

[New](#)[Deleted Fields](#)[Field Dependencies](#)[Set History Tracking](#)

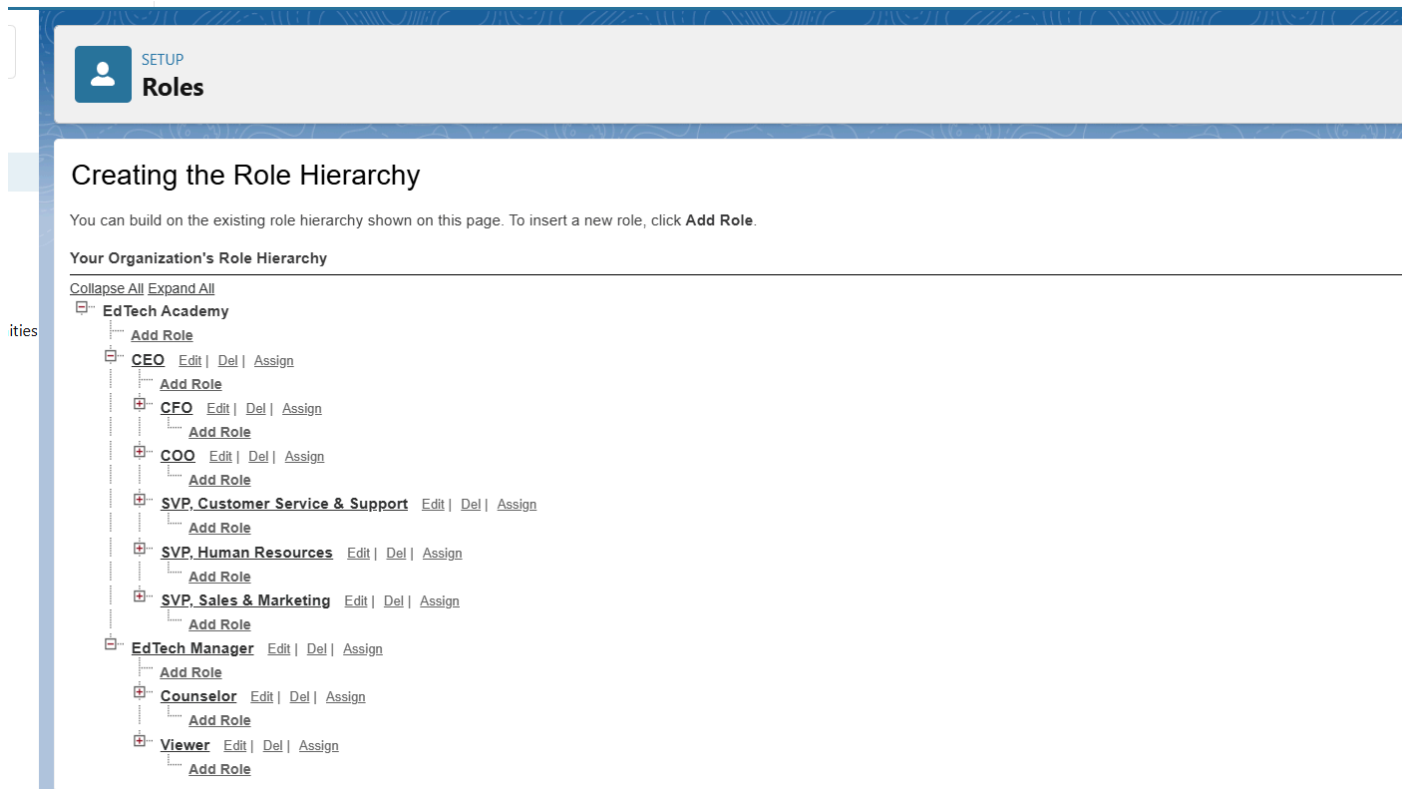
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Counselor Comments	Counselor_Comments__c	Long Text Area(32768)		<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		
Created Date	Created_Date__c	Date/Time		<input type="checkbox"/>
Enrollment Name	Name	Text(80)		<input checked="" type="checkbox"/>
Follow up Required	Follow_up_Required__c	Checkbox		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Program Name	Program_Name__c	Text(80)		<input type="checkbox"/>
Record Type	RecordTypeId	Record Type		<input checked="" type="checkbox"/>
Review Date	Review_Date__c	Date		<input type="checkbox"/>

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15 Items, Sorted by Field Label

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Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Program Name	Program_Name__c	Text(80)		<input type="checkbox"/>
Record Type	RecordTypeId	Record Type		<input checked="" type="checkbox"/>
Review Date	Review_Date__c	Date		<input type="checkbox"/>
Reviewed By	Reviewed_By__c	Lookup(User)		<input checked="" type="checkbox"/>
Status	Status__c	Picklist		<input type="checkbox"/>
Student email	Student_email__c	Email		<input type="checkbox"/>
Student Name	Student_Name__c	Text(80)		<input type="checkbox"/>
User	Counselor__c	Lookup(User)		<input checked="" type="checkbox"/>



Phase 3: Record Types, Intelligent Automation & UI Customization

This phase engineered dynamic record types for the Enrollment object (New, Approved, Rejected, Waitlisted), each mapped to user profiles with corresponding permissions. Phase3-1.pdf

Lightning record pages were crafted, enhancing user experience with context-driven component visibility and tabs for details, history, and related records. Phase3-1.pdf

A record-triggered flow automated application management: triggering emails and tasks based on status changes, with decision elements sending specific notifications for each outcome (welcome, regret, reminder). Phase3-1.pdf

Lightning Page Detail

EditCloneDelete

Information

Name

EnrollmentV1_Record_Page

Label

EnrollmentV1 Record Page

Description

EditCloneDelete

Assignments By App

App	Form Factor
EdTech Enrollment	Desktop and phone

Assignments By App, Record Type, and Profile

App	Record Type	Profile	Form Factor
EdTech Enrollment	External	Counselor	Desktop and phone
EdTech Enrollment	Internal	Counselor	Desktop and phone
EdTech Enrollment	Master	Counselor	Desktop and phone
EdTech Enrollment	External	Standard User	Desktop and phone
EdTech Enrollment	Internal	Standard User	Desktop and phone
EdTech Enrollment	Master	Standard User	Desktop and phone
EdTech Enrollment	External	System Administrator	Desktop and phone
EdTech Enrollment	Internal	System Administrator	Desktop and phone
EdTech Enrollment	Master	System Administrator	Desktop and phone

Back To Top

Always show me more records per related list

Lightning App Builder

Pages

EnrollmentV1 Record Page

Help

Desktop

Shrink To View

AnalyzeActivation...Save

Components

Fields

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Standard (42)

Accordion

Action Launcher

Actions & Recommendations

Activities

Approval Trace

Assessment List

CRM Analytics Collection

CRM Analytics Dashboard

Dynamic Related List - Single

Einstein Next Best Action

Flow

Flow Orchestration Work Guide

Highlights Panel

Invoice Preview

Launchpad

Get more on the AppExchange

Details

Information

Enrollment Name

Enrollment Name

User

User

Student email

Student email

Status

Status

Created Date

Created Date

Program Name

Program Name

Student Name

Student Name

Counselor Comments

Counselor Comments

Follow up Required

Follow up Required

Reviewed By

Reviewed By

Owner

Owner

Page

* Label

EnrollmentV1 Record Page

* API Name

EnrollmentV1_Record_Page

* Page Type

Record Page

Object

Enrollment

Template

Header and Two Equal Regions

Change

Description

Enable page-level dynamic actions for the Salesforce mobile app

Lightning App Builder

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Review Date

Review Date

System Information

Created By

Created By

Last Modified By

Last Modified By

Notes & Attachments (0)

Upload Files

Or drop files

Review Notes

Counselor Comments

Counselor Comments

Review Date

Review Date

Reviewed By

Reviewed By

Follow up Required

Follow up Required

Your application has been received. Please upload your documents and await counselor review.

Congratulations! Your enrollment has been approved. Please check your email for onboarding instructions and next steps.

Page

* Label

EnrollmentV1 Record Page

* API Name

EnrollmentV1_Record_Page

* Page Type

Record Page

Object

Enrollment

Template

Header and Two Equal Regions

Change

Description

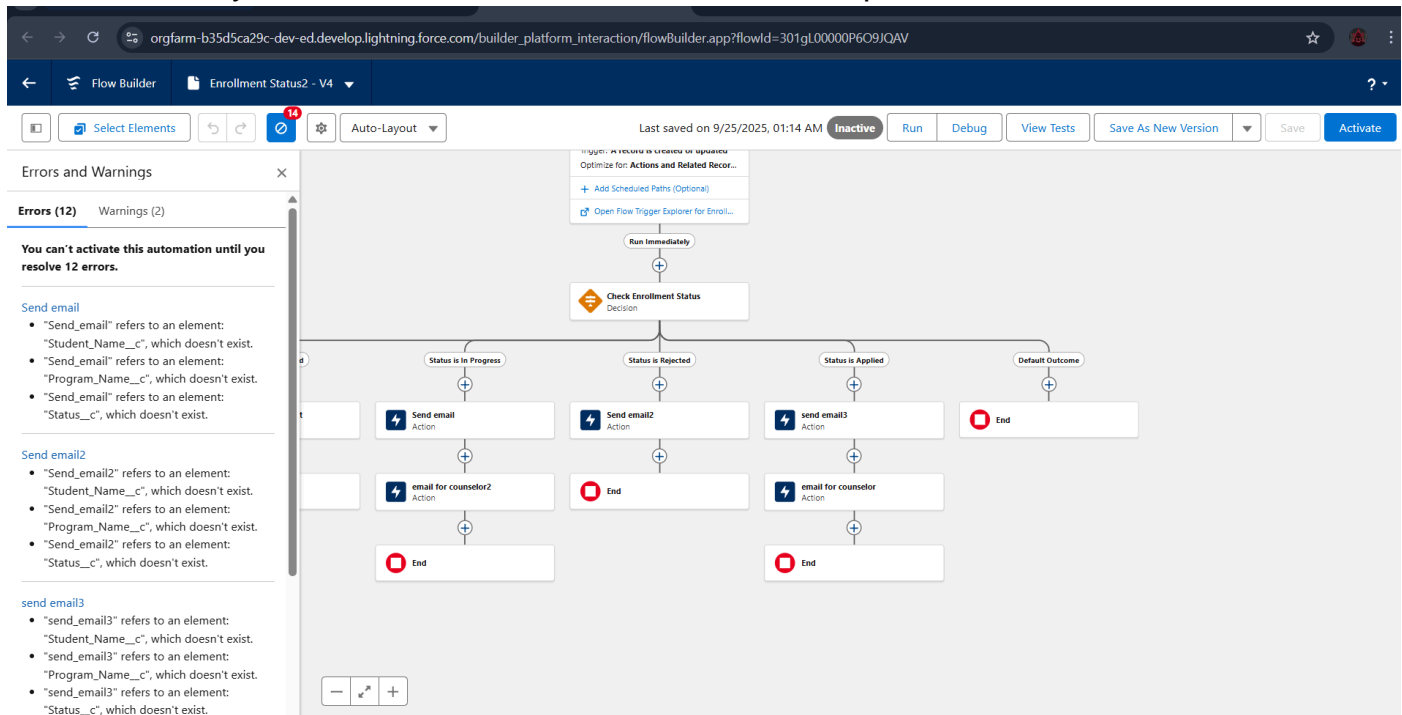
Enable page-level dynamic actions for the Salesforce mobile app

Phase 4: Flow Logic for Enrollment and Notification

Advanced automation included flows to to:

Notify students immediately when their application status changed using Salesforce Send Email Actions, with dynamic merge fields for personalized communication.Phase4-1.pdf

Introduce fault handling paths for robust error management and custom email templates to ensure consistency for students and staff. All flows ran on record creation or status update, with careful entry conditions and action outcomes.Phase4-1.pdf



Phase 5: Data Management and Deployment

Field audits ensured naming consistency, usability, and compliance across Enrollment, Student, and Course objects.phase5-2.pdf

Deprecated unused fields and fine-tuned picklist handling for robust automation and reporting.

Validation rules were refactored for reliability and smooth user experience, covering status selection and date logic.phase5-2.pdf

Deployment was orchestrated via change sets, with a pre-launch checklist including sandbox simulation, permission set review, and post-launch monitoring for errors and process verification.phase5-2.pdf

Phase 6: Apex Programming

Backend enhancements included developing Apex triggers to enforce business rules and extend automation beyond Flow Builder limitations.Phase-6-1.pdf

Triggers prevented future-dated enrollments, auto-assigned record ownership, and logged all status changes in custom objects for audit and compliance.Phase-6-1.pdf

Test classes were provided for each trigger, and all were deployed via change sets with detailed documentation.

The Lightning App Builder was employed to design role-specific interfaces: dynamic visibility for fields based on record status, quick links, dashboards, and utility bar integrations streamlined workflows for Admins, Counselors, and Analysts.phase-7.pdf

Phase 7 : User Interface Development

focused on developing intuitive, role-based user interfaces using Salesforce Lightning App Builder for the EdTech Enrollment system. The team customized record pages for Students, Programs, and Enrollments, embedding flows and dashboards while using conditional visibility to show relevant details based on enrollment status. The home page and navigation were organized by roles, giving tailored layouts and dynamic access to key information. These enhancements significantly improved user experience, ensuring clarity and efficient workflow for all profiles.phase-7.pdf

Phase 9: Reports and Documentation

The final phase focused on actionable analytics and project transparency:

Designed reports and dashboards tracking enrollment pipeline, automation audit, and program demand, using validated fields for robust analysis.Phase-9.pdf

Visualizations included funnel, donut, and line charts, as well as program heatmaps.

Documentation consolidated all technical details, ensuring maintainability and knowledge transfer for future enhancements.Phase-9.pdf

EdTech Enrollment

Home

Enrollments

Reports

Dashboards

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Share

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Notifications

Profile

REPORT

Enrollments status reports

Enrollments

Refresh

Share

Add Chart

Save & Run

Save

Close

Run

Outline

Filters

Groups

GROUP ROWS

Add group...

Enrollment Status

GROUP COLUMNS

Add group...

Columns

Add column...

Enrollment: Enrollment Name

Student email

Program Name

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Enrollment Status	Enrollment: Enrollment Name	Student email	Program Name
Applied (2)	Parth Khare	rohit@gmial.com	c++
	ppp	khareparth40@gmail.com	c++
Subtotal			
Approved (2)	Parth Khare	khareparth40@gmail.com	c++
	pankaj	khareparth40@gmail.com	c++
Subtotal			
Total (4)			

REPORT

New Enrollments Report Enrollments

[Add Chart](#)
[Save & Run](#)
[Save](#)
[Close](#)
[Run](#)

Show Fields

Filters

Groups

GROUP ROWS

Add group...

Reviewed By X

Review Date X

GROUP COLUMNS

Add group...

Columns

Add column...

Enrollment: Enrollment Name X

Enrollment Status X

Student email X

Program Name X

Previewing a limited number of records. Run the report to see everything.

Reviewed By	Review Date	Enrollment: Enrollment Name	Enrollment Status	Student email	Program Name
- (4)	- (4)	Parth Khare	Applied	rohit@gmail.com	c++
		ppp	Applied	khareparh40@gmail.com	c++
		Parth Khare	Approved	khareparh40@gmail.com	c++
		pankaj	Approved	khareparh40@gmail.com	c++
		Subtotal			
		Subtotal			
		Total (4)			

Update Preview Automatically



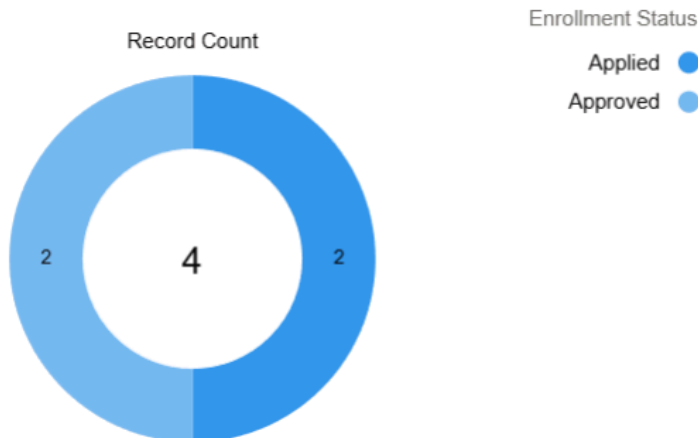
Search...



Dashboard Enrollment Dashboard

As of Sep 25, 2025, 10:15 AM Viewing as Parth Khare

Enrollments status reports



[View Report \(Enrollments status reports\)](#)

As of Sep 25, 2025, 10:15 AM

Project Outcomes and Value

End-to-End Automation: The project automated every step from student submission to final enrollment, including all necessary email communications, auditing, and follow-up actions. Phase-6-1.pdf+2

Security and Compliance: Strong governance was ensured through finely granular role/access controls, field-level visibility management, and robust validation rules. phase5-2.pdf+1

User Experience: The interface design delivered tailored, intuitive navigation for all users, improving speed and clarity in daily operations. phase-7.pdf+1

Scalability and Auditability: Metadata packaging, audit logs, and reports ensure the solution remains scalable, traceable, and upgrade-friendly. Phase-9.pdf+2

Business Insight: Dashboards and data models provide constant insights for decision-makers and administrators, tying automation outcomes directly to institutional goals. Phase-9.pdf+1

This comprehensive implementation provides a future-proof foundation for EdTech Enrollment, bringing together cutting-edge Salesforce automation, secure architecture, and actionable intelligence.

For more screen shorts visit phase wise pdf uploaded above####