StudentEnrollment&CourseManagement System (SECMS)

UserStory:

The Student Enrollment & Course Management System is a comprehensive Salesforce application designed to streamline and automate the academic enrollment operations ofan educational institute. This system enables administrators, enrollment officers, and instructors to efficiently managestudentrecords,courseofferings,enrollments,instructor assignments, approval processes, payments, and reporting—all within a unified Salesforce environment.

1. INTRODUCTION

ProjectOverview :

This project aims to centralize all student, course, and enrollment-related data within a single Salesforce application to ensure easy data access, structured workflows, and accurate reporting.ThesystemallowsEnrollmentOfficerstomanagestudentadmissions, course registrations, and communication effectively, while instructors and administrators gain full transparency into course allocations and academic progress. The solution also enables automated instructorassignment,taskcreation,validationchecks,andmulti-level approval processes for enrollment management.

With Salesforce Flows, Approval Processes, Validation Rules, Reports, and Dashboards, the organization can ensure that all enrollment operations—from admission to course completion—are handled systematically and with continuous monitoring of key performance indicators such as enrollment volume, revenue, student status distribution, and pending approvals.

Purpose:

TheprimarypurposeofSECMSistoreplacemanualandfragmentedenrollment processes with a scalable, automated, and secure Salesforce solution that ensures:

Accurate student data management
Structured enrollment workflows
Automatedapprovalsandvalidations
Transparentreportingandmonitoring

2. IDEATIONPHASE

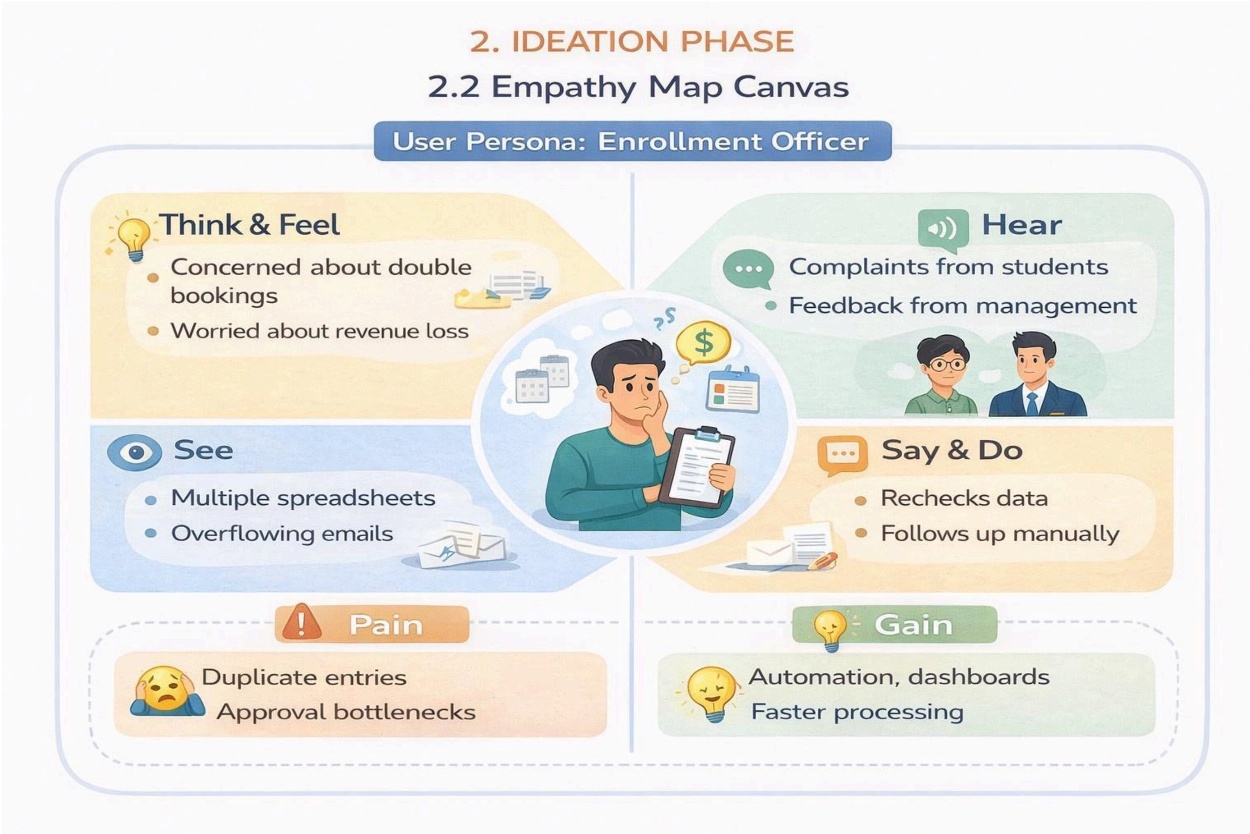
ProblemStatement(CustomerProblemStatementTemplate)

PS	**I am (Customer)**	**I'mtrying to**	**But**	**Because**	**Which makesme feel**
PS-1	Enrollment Officer	manage student enrollments efficiently	enrollment data is scattered	systems are manual and unintegrated	frustrated and error-prone
PS-2	Administrator	track enrollments andrevenue	reportingis delayed	data is not centralized	uncertainin decision-making

EmpathyMapCanvas

UserPersona: EnrollmentOfficer

- **Think&Feel:**Concernedaboutdoublebookingsandrevenueloss
- **Hear:**Complaintsfromstudentsandmanagement
- **See:**Multiplespreadsheetsandemails
- **Say&Do:**Rechecksdata,followsupmanually
- **Pain:**Duplicateentries,approvalbottlenecks
- **Gain:**Automation,dashboards,fasterprocessing



Brainstorming&IdeaPrioritization

Step1–BrainstormedIdeas

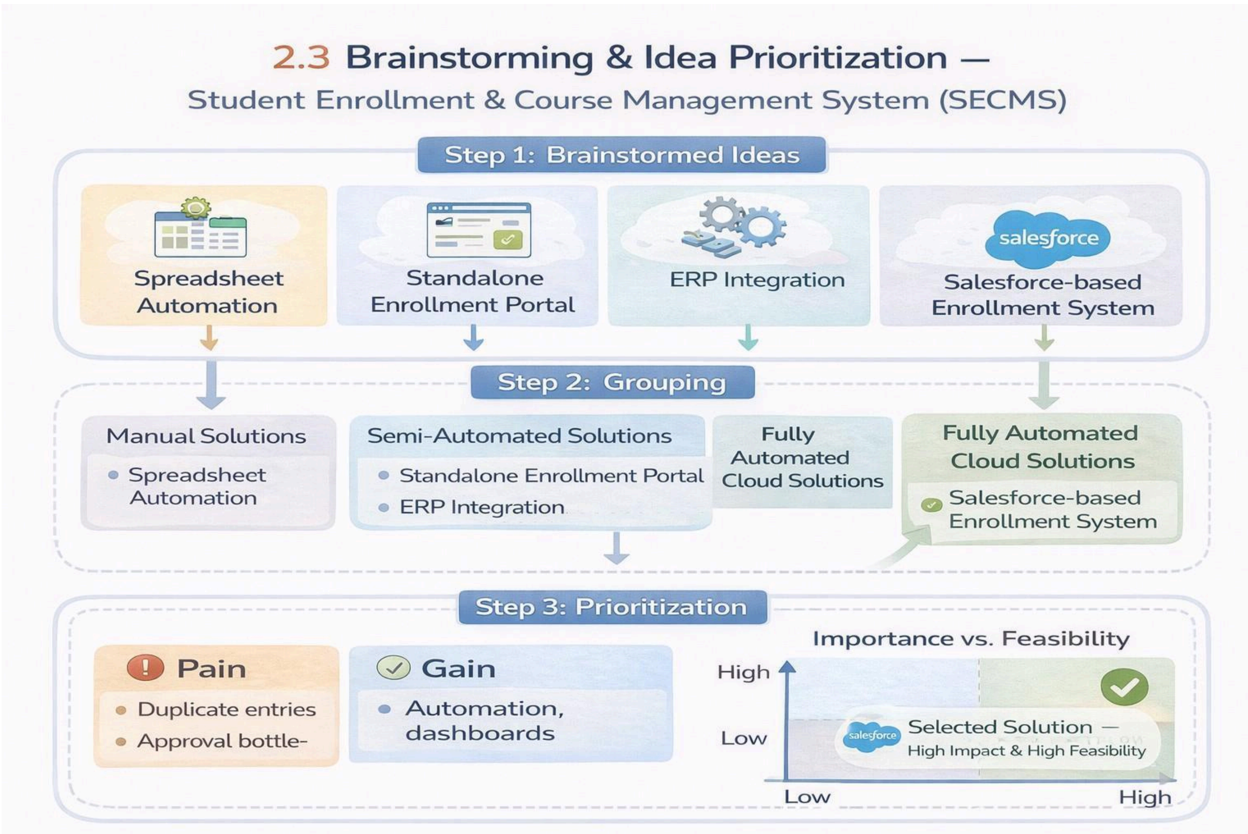
- Spreadsheetautomation
- Standaloneenrollmentportal
- ERPintegration
- Salesforce-basedenrollmentsystem

Step2– Grouping

- Manualsolutions
- Semi-automatedsolutions
- Fullyautomatedcloudsolutions

Step3– Prioritization

Salesforce-basedSECMSwasselectedduetohighfeasibilityandhighimpact.



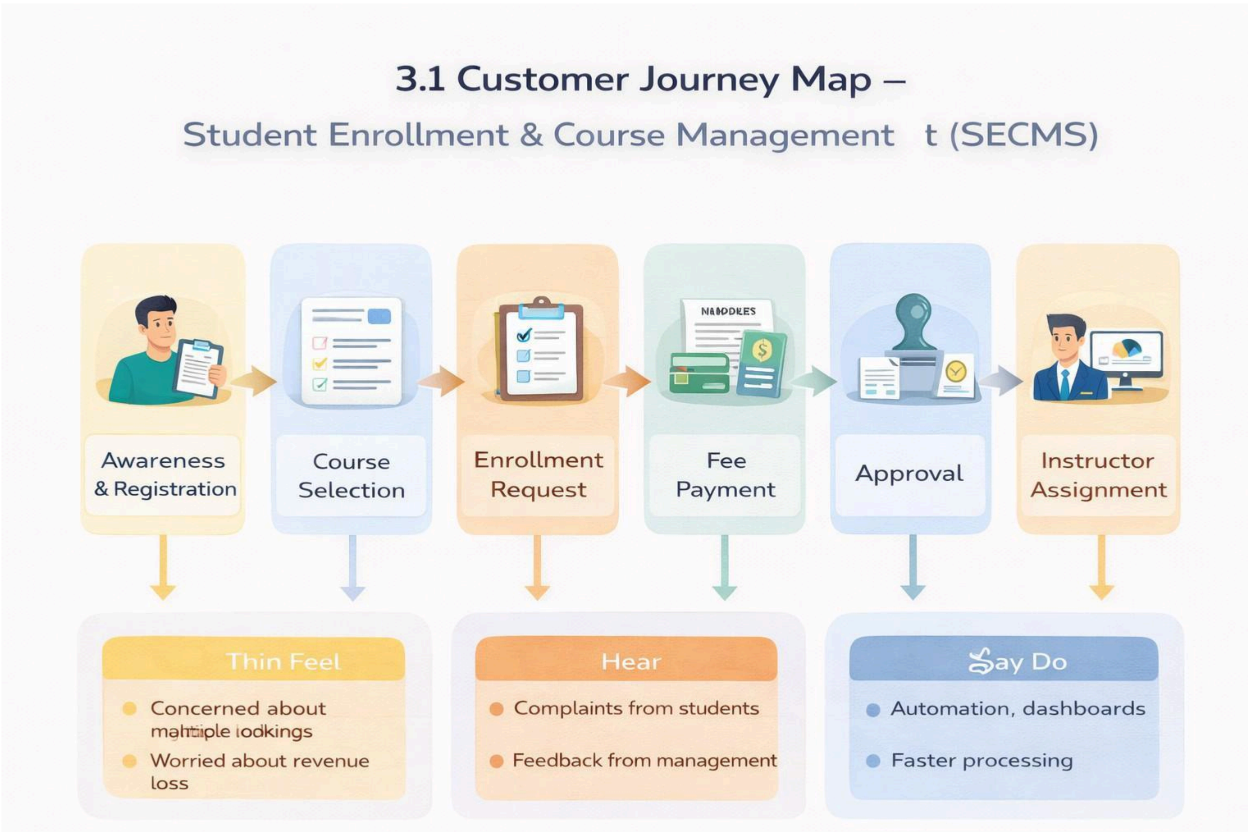
3.REQUIREMENTANALYSISPHASE

CustomerJourneyMap

Stagescovered:

- Awareness&Registration
- CourseSelection
- EnrollmentRequest
- FeePayment
- Approval
- InstructorAssignment

- Reporting&Completion



SolutionRequirements

FunctionalRequirements

FRNo	Epic	Description
FR-1	StudentManagement	Managestudentrecords
FR-2	CourseManagement	Createandmanagecourses
FR-3	EnrollmentProcessing	Request,approve,rejectenrollments

FR-4	InstructorAssignment	Auto-assigninstructors
FR-5	Reporting	Dashboardsandreports

Non-FunctionalRequirements

NFR-1: Usability

The system shall provide a simple, intuitive, and user-friendly interface that enables enrollment officers, administrators, instructors, and students to perform operations efficientlywithminimaltraining.Navigationshallbeorganizedthroughclearlylabeled tabs, dashboards, and forms to reduce user effort and errors.

Examples:

- Quickstudentregistrationform
- One-clickenrollmentapproval
- Role-baseddashboards

NFR-2:Security

The system shall ensure the confidentiality, integrity, and protection of student and institutional data through secure authentication, authorization, and access controls. Sensitiveinformationsuchaspersonaldata,enrollmenthistory,andacademicrecords shall only be accessible to authorized users.

Examples:

- Onlyadminscanmodifycoursedetails
- Instructorsviewonlyassignedstudents
- Studentscannotaccessotherstudentrecords

NFR-3:Reliability

Thesystemshalloperateconsistentlyandaccuratelywithoutfailuresduringenrollment processing, approvals, and reporting. Automation logic shall execute correctly to avoid duplicate or incorrect enrollments.

Examples:

- Noduplicatecourseregistration
- Accuratestatusupdatesafterapprovals
- Consistentreportgeneration

NFR-4:Performance

Thesystemshallprovidefastresponsetimesforalloperationstoensuresmoothand uninterrupted user experience, especially during peak admission periods.

Examples:

- Quickdashboardrefresh
- Fastsearchforstudentrecords
- Nolagduringbulkuploads

NFR-5:Scalability

The system shall support future growth in the number of students, courses, departments, anduserswithoutdegradationinperformanceorfunctionality.Itshallalloweasyaddition of new modules and features.

Examples:

- Addnewdepartmentswithoutredesign
- Handleincreasedadmissionsannually
- Extendtomobileorportalintegration

NFR-6:Availability

The system shall be continuously accessible to users during institutional working hours andmustminimizedowntime.Theplatformshallsupporthighavailabilityforacademic operations.

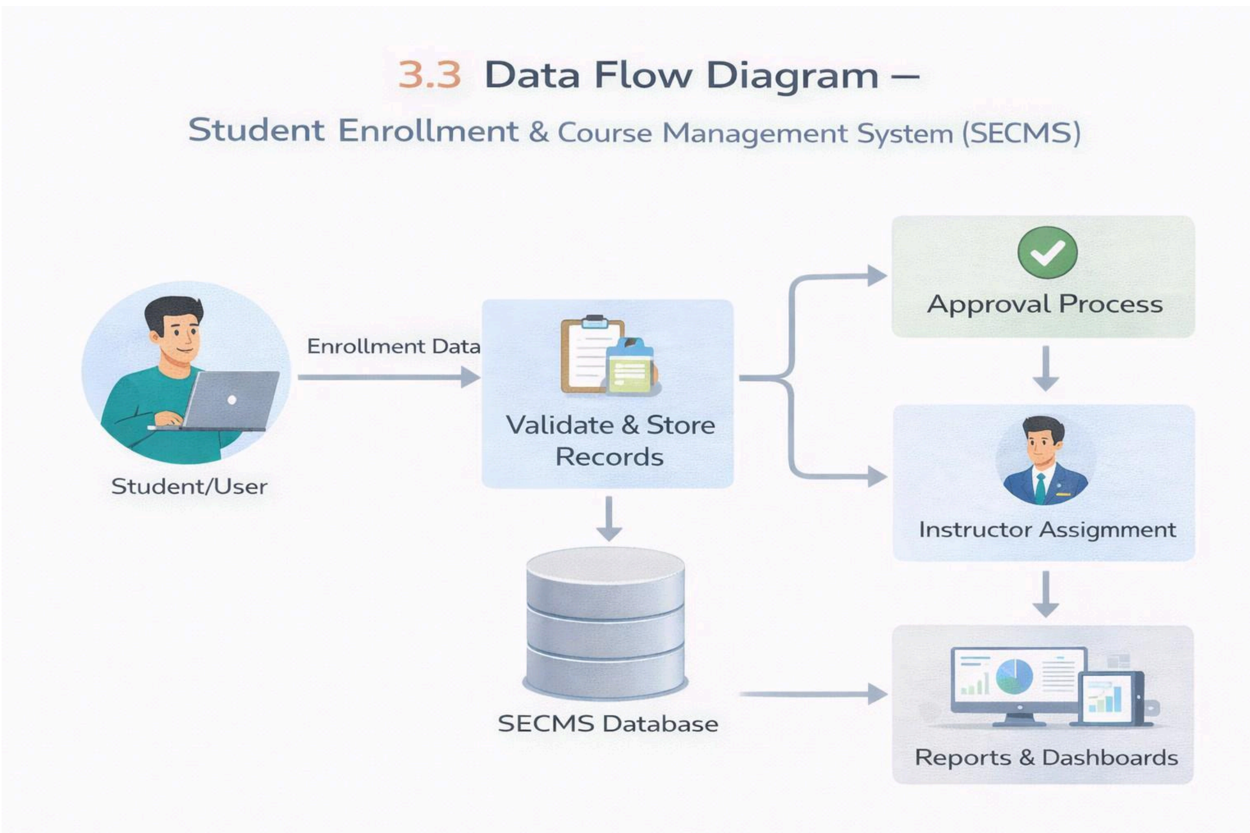
Examples:

- 24/7cloudaccess
- Reliableduringpeakadmissionseason
- Automaticbackupofstudentrecords

DataFlowDiagram

- Userinputsstudentandenrollmentdata
- Systemvalidatesandstoresrecords
- Approvalprocessroutesdata
- Reportsanddashboardsconsumeprocesseddata.

Thesystemprocessesenrollmentrequests,validatesdata,routesapprovals,assigns instructors, and generates reports.



TechnologyStack

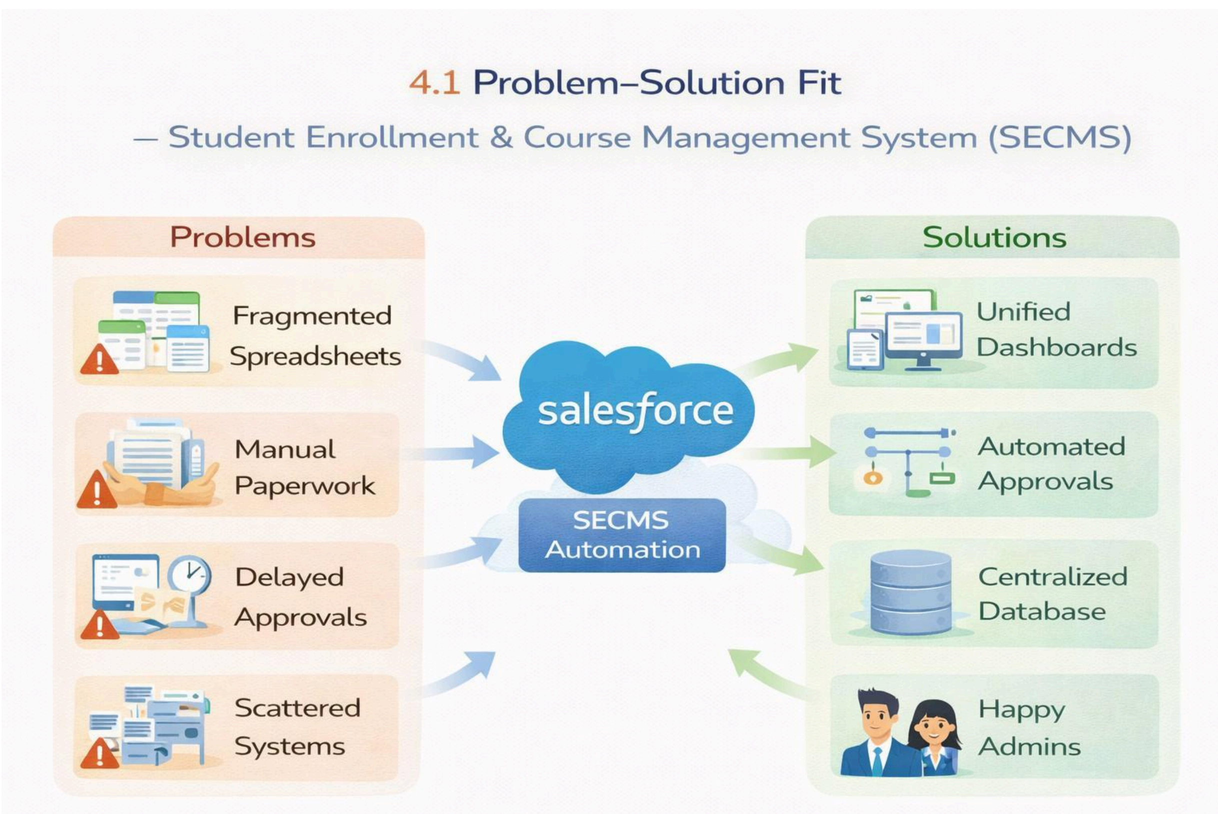
Layer	Technology
UI	SalesforceLightning

Logic	SalesforceFlows
Database	SalesforceObjects
Automation	Validation Rules,ApprovalProcess
Reporting	Reports&Dashboards

4. PROJECTDESIGNPHASE

Problem–SolutionFit

SECMSdirectlyaddressesfragmentedenrollmentworkflowsbyaligninguser behavior, constraints, and automation using Salesforce-native capabilities.



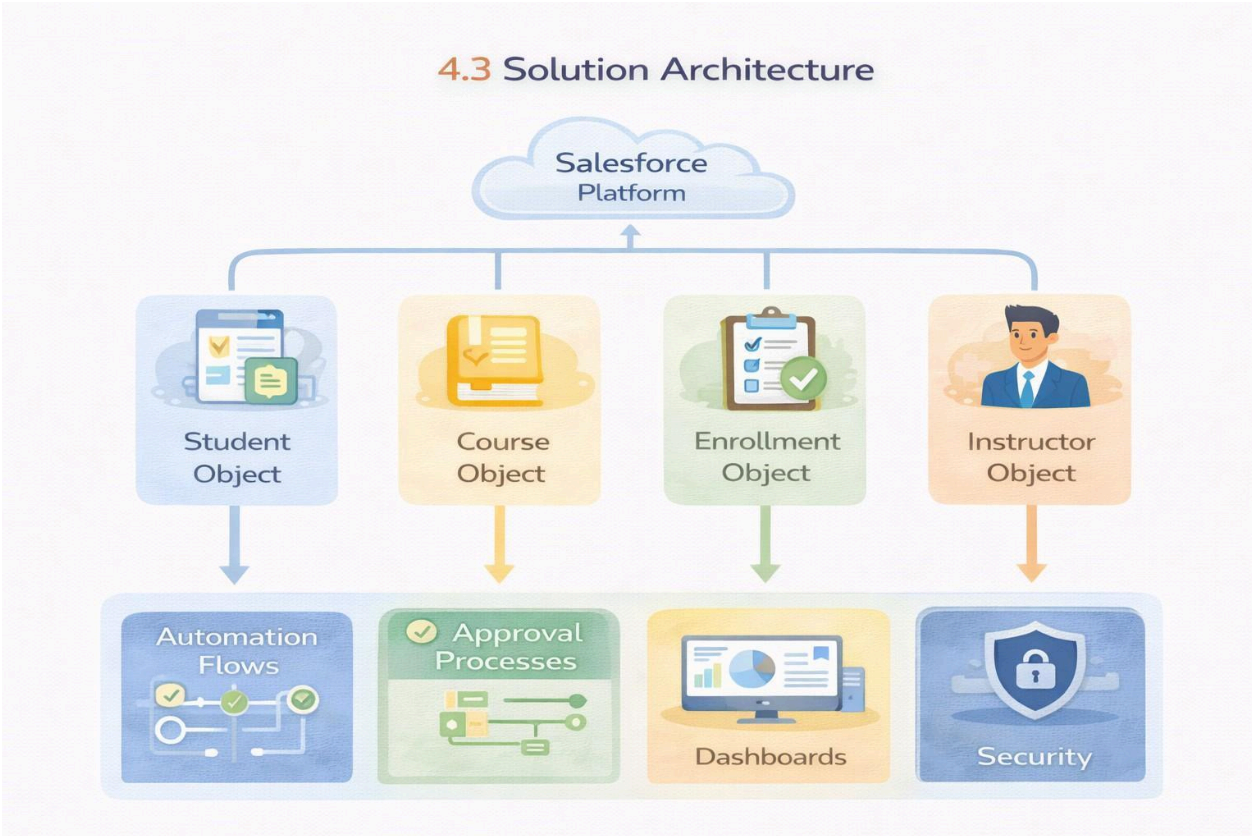
ProposedSolution

FunctionalRequirements

Parameter	Description
Problem	Manualenrollmenthandling
Solution	Salesforce-basedSECMS
Novelty	End-to-endautomation
SocialImpact	Improvedstudentexperience
RevenueModel	Institutionaldeployment
Scalability	Multi-departmentsupport

SolutionArchitecture

ThearchitectureintegratesSalesforceobjects,automationflows,approvalprocesses, dashboards, and security layers.



5. PROJECTPLANNING&SCHEDULING

ProjectPlanning

- Agilemethodology
- Epics→Stories→StoryPoints
- Sprint-basedexecution
- Velocitycalculationusedforestimation

ProductBacklog,SprintSchedule,andEstimation(4Marks)

Usethebelowtemplatetocreateproductbacklogandsprintschedule

Sprint	Functional Requirement (Epic)	User Story Number	UserStory/Task	Story Points	Priority	Team Members
Sprint-1	Developer Setup	USN-1	As a system administrator, I want to create a Salesforce developer accountsothatIcanconfigureand deploy the Student Enrollment system..	1	High	Kalaiyarasi j
Sprint-1	DataModeling	USN-2	Asanadmin,Iwantto create customobjectsforStudent,	3	High	Parameswari B

Sprint	Functional Requirement (Epic)	User Story Number	UserStory/Task	Story Points	Priority	Team Member s
			Course,Enrollment,andInstructor so that academic data can be stored and managed efficiently.			
Sprint-2	DataModeling	USN-3	Asauser,Iwantdedicatedtabsfor each object so that I can easily navigate between students, courses, enrollments, and instructors.	3	High	Nivetha S
Sprint-2	DataModeling	USN-4	As an admin, I want to create relevant fields such as student details, course information, and enrollmentstatussothatcomplete records can be captured accurately.	5	High	Jayasri S
Sprint-2	DataModeling	USN-5	As an enrollment officer, I want a centralizedLightningAppsothatI can access all academic operations from one interface.	3	High	Kalaiyarasi j
Sprint-2	DataModeling	USN-6	As an admin, I want to define relationships between students, courses,andenrollmentssothat thesystemcanlogicallylinkand track academic activities.	5	Medium	Parameswari B
Sprint-2	DataModeling	USN-7	Asauser,Iwantcustomizedpage layouts so that only relevant informationisdisplayed,improving clarityandeaseofdataentry.	5	High	Parameswari B
Sprint-3	Automation	USN-8	As a system, I want to validate input data such as mandatory fields and enrollment limits so that incorrectorincompleterecordsare prevented.	3	High	Kalaiyarasi j
Sprint-3	Automation	USN-9	As a system, I want automated flows to handle enrollment processingandnotificationssothat manual effort is reduced and processesbecomefaster.	3	High	Jayasri S
Sprint-3	Automation	USN-10	As an administrator, I want an approval process for enrollment requestssothatregistrationsare verified before confirmation.	5	High	Nivetha S
Sprint-4	Security	USN-11	Asanadmin,Iwanttoconfigure role-basedsecuritysothatusers canonlyaccessdatarelevantto their responsibilities.	5	High	Parameswari B
Sprint-5	Reports	USN-12	As a manager, I want reports on student enrollments, course registrations, and instructor assignmentssothatIcanmonitor academic operations.	4	High	Parameswari B
Sprint-6	Dashboards	USN-13	Asamanager,Iwantvisual dashboardsshowingenrollment	4	Medium	Kalaiyarasi j

Sprint	Functional Requirement (Epic)	User Story Number	UserStory/Task	Story Points	Priority	Team Members
			statisticsandtrendssothatIcan quickly analyze system performance.			

ProjectTracker,Velocity&BurndownChart:(4Marks)

Sprint	TotalStory Points	Duration	SprintStart Date	SprintEndDate (Planned)	StoryPoints Completed (as on PlannedEnd Date)	SprintRelease Date (Actual)
Sprint-1	20	6Days	03mar 2026	04mar 2026	20	09mar 2026
Sprint-2	20	6Days	04mar 2026	05 mar 2026		
Sprint-3	20	6Days	06mar 2026	07 mar 2026		
Sprint-4	20	6Days	08 mar 2026	09 mar 2026		

6. ProjectDevelopmentPhase:

ProjectFlow:

Milestone1:SalesforceDeveloperAccountCreation
Milestone2:CustomObjectCreation(Student,Course,Enrollment,Instructor) Milestone 3: Tabs Creation
Milestone4:LightningAppCreation
Milestone 5: Fields Creation

Milestone 6: Create Relationships

Milestone7:PageLayoutCustomization Milestone
8: Validation Rules
Milestone9:Flows(Automation)
Milestone 10: Approval Process
Milestone 11: Reports
Milestone 12: Dashboards
Milestone13:SecuritySetup
Milestone 14: Conclusion

Whatyou'lllearn

1. Real-timeSalesforceprojectimplementation
2. Designingcustomobjectsandrelationships
3. Creatingpagelayouts&recordtypes
4. Writingvalidationrules
5. Buildingautomationwithflows
6. Creatingapprovalworkflows
7. Developingreports&dashboards
8. Settingupsecuritywithprofiles,permissionsets,andsharing
9. End-to-endapplicationtesting

Milestone1-Salesforce :

Introduction:

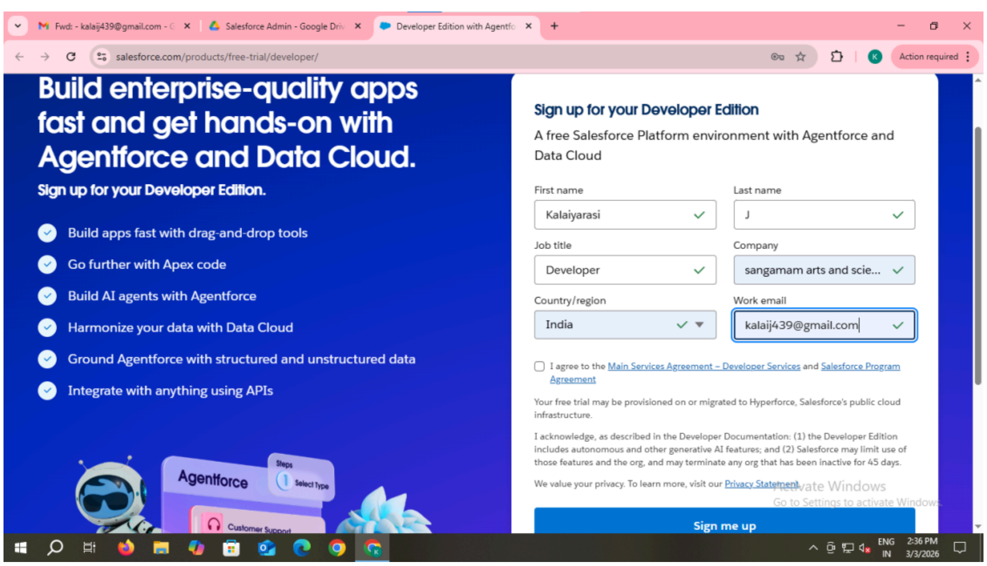
Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don’t know where you should start on your learning journey? If you’ve answeredyestoanyofthesequestions,thenyou’reintherightplace.This module is for you.
WelcometoSalesforce!Salesforceisgame-changingtechnology,witha host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we’ll take you through these features and answer the question, “What is Salesforce, anyway?”.

WhatIsSalesforce?

Salesforceisyourcustomersuccessplatform,designedtohelpyousell, service, market, analyze, and connect with your customers.
Salesforce has everything you need to run your business from anywhere. Usingstandardproductsandfeatures,youcanmanagerelationshipswith prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:
https://youtu.be/r9EX3lGde5k

Activity1:CreatingDeveloperAccount:

Creatingadeveloperorginsalesforce.
Go to
https://developer.salesforce.com/signupOnthesig nupform,enterthefollowingdetails:

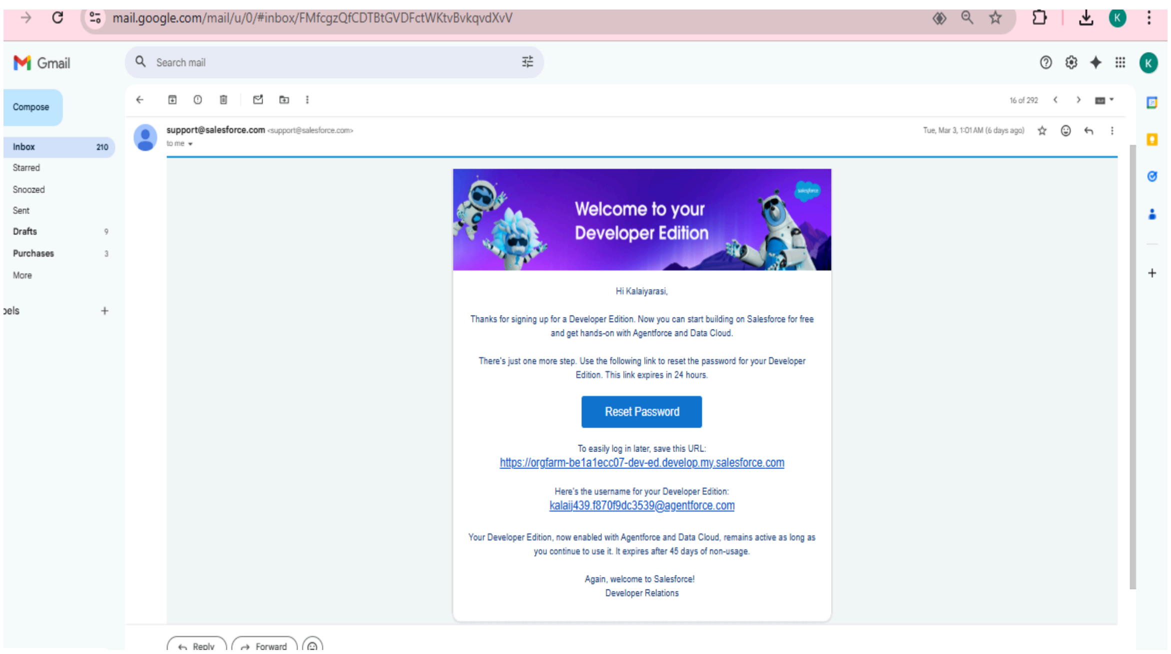


Firstname&Lastname
Email
Role: Developer

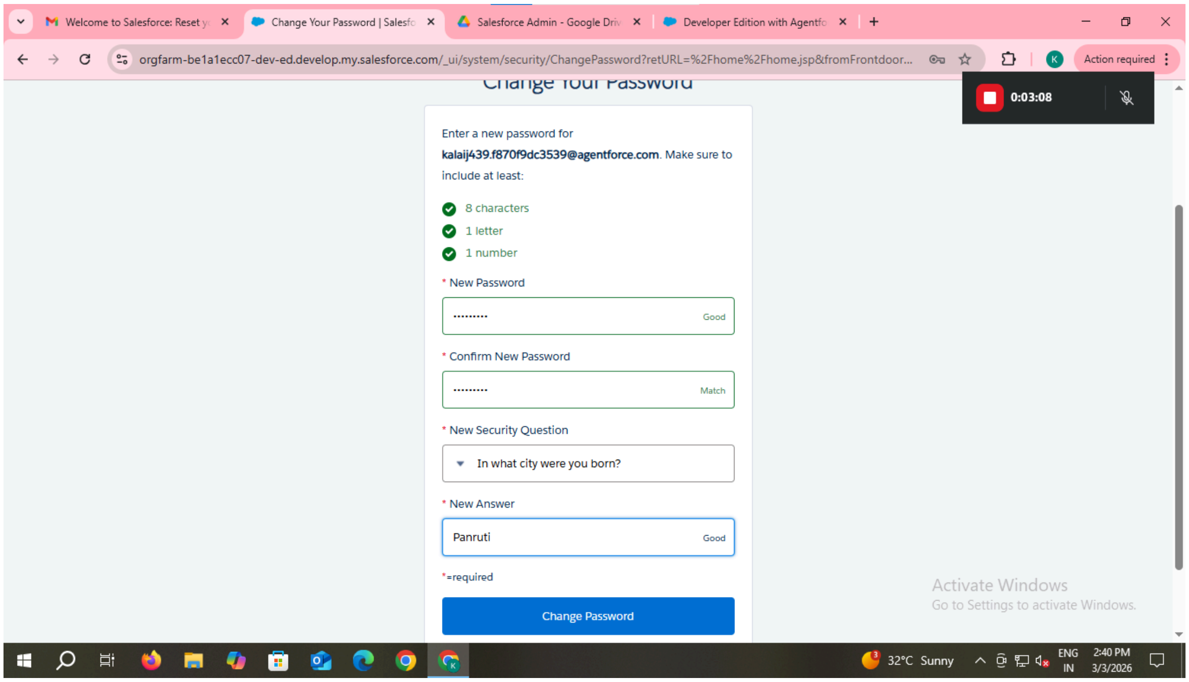
Company:CollegeName County
: India
PostalCode:pincode
Username:shouldbeacombinationofyournameandcompany
Thisneednotbeanactualemailid,youcangiveanythingintheformat:
username@organization.com
Clickonsignmeupafterfillingthese.

Activity2:AccountActivation:

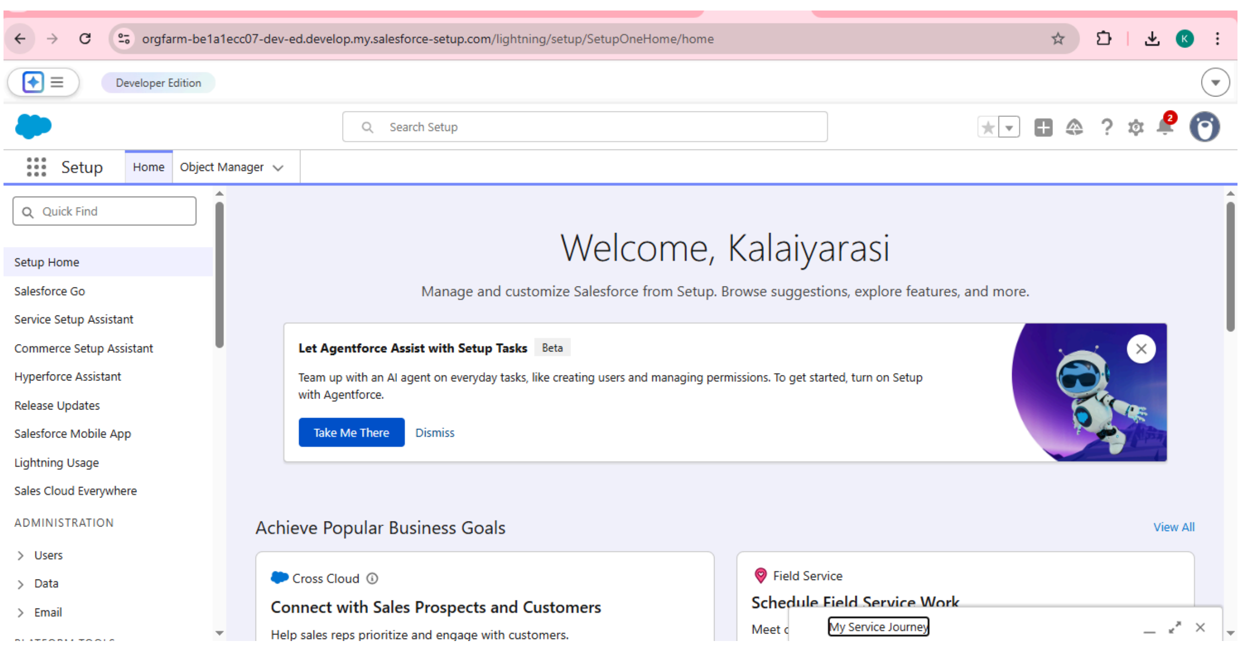
1. Gototheinboxoftheemailthatyouusedwhilesigningup.Clickonthe verify account to activate your account. The email may take 5-10mins.



2. ClickonVerifyAccount
3. Giveapasswordandansweraseurityquestionandclickonchange password.



4. Thenyouwillredirecttoyoursalesforcesetuppage.



Milestone2–Objects:

Activity1:CreatingStudentObject:

The purpose of creating the Student custom object is to store and manage informationaboutstudentssuchastheirpersonaldetails,contactinformation,and enrollment status.

TocreatetheStudentobject:

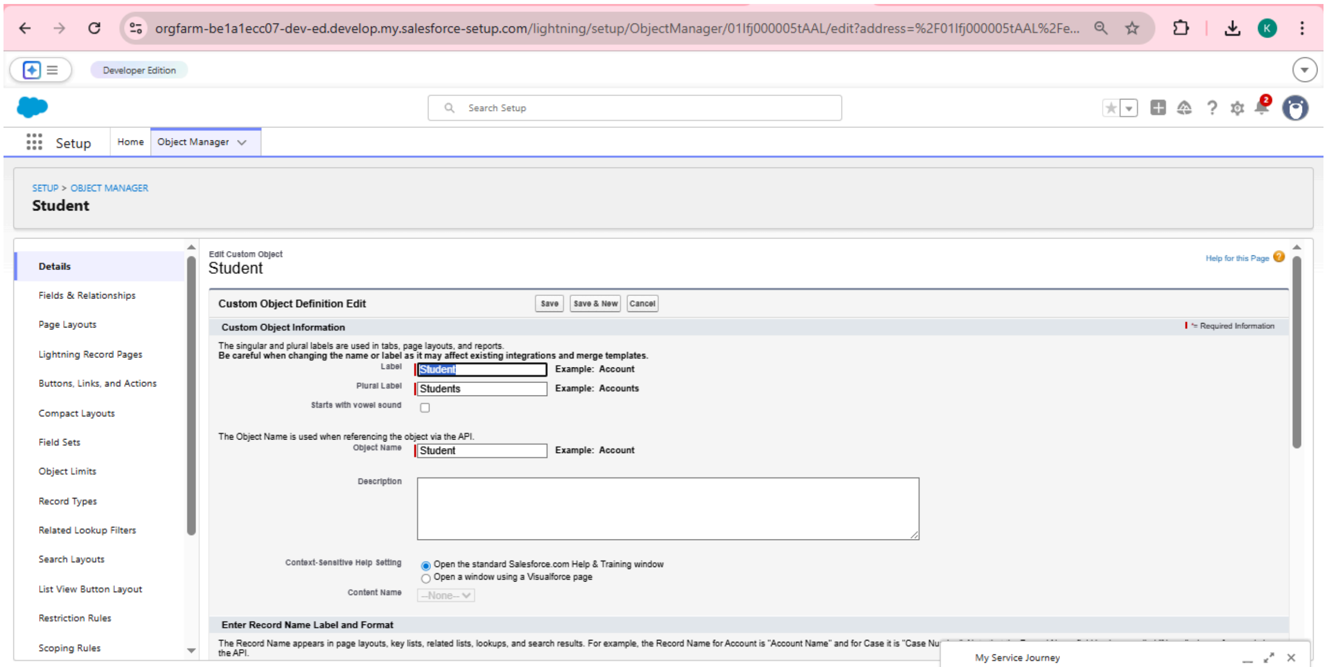
Go to the Setup page.

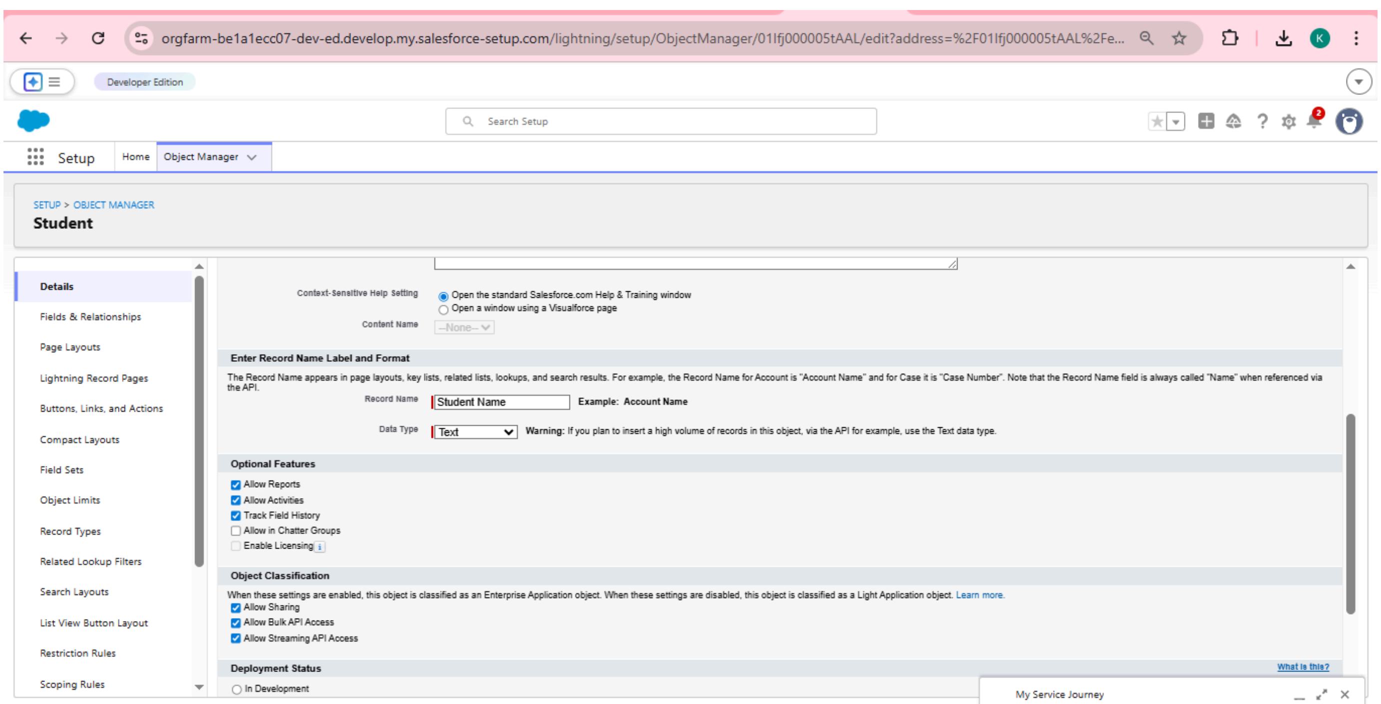
ClickonObjectManager.

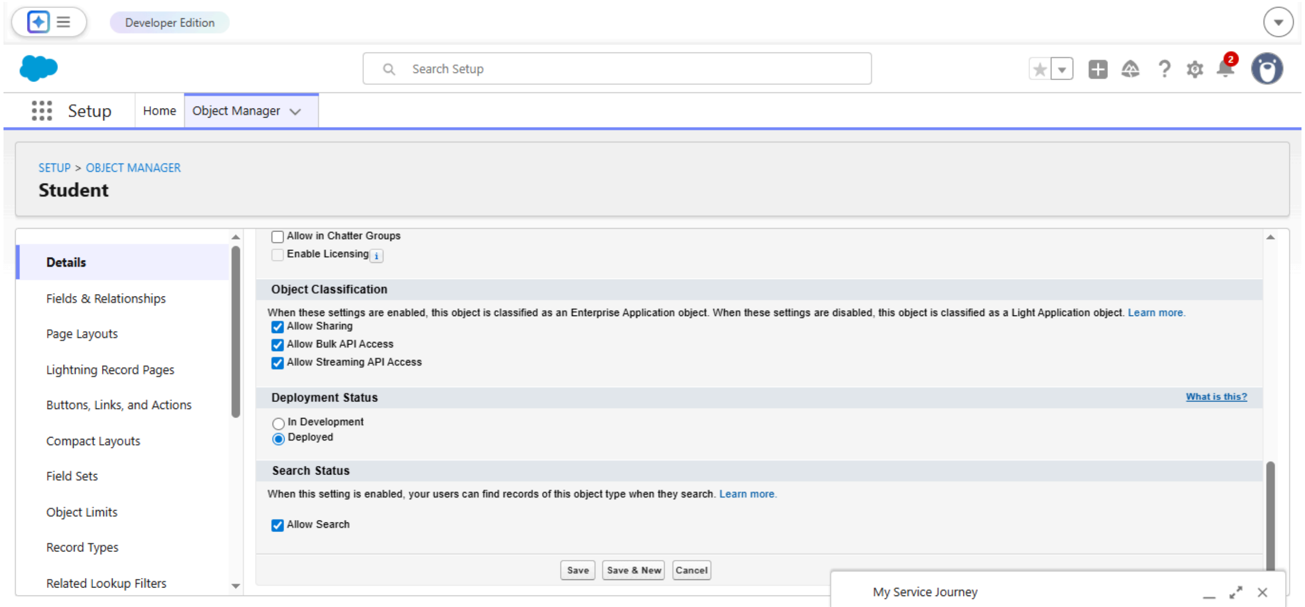
ClickonCreate→CustomObject.

Enterthedetailsasbelow:

1. Label:Student
2. PluralLabel:Students
3. ObjectName:Student
4. RecordName:StudentName
5. DataType:Text
6. UnderOptionalFeatures,select:
7. AllowReports
8. AllowActivities(optionalbutrecommended)
9. TrackFieldHistory(optional,ifyouwant)
10. UnderSearchStatus,select:
11. AllowSearch
12. ClickSave.







Developer Edition
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Allow in Chatter Groups
Enable Licensing
Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Deployment Status
What is this?
In Development
Deployed
Search Status
When this setting is enabled, your users can find records of this object type when they search. Learn more.
Allow Search
Save
Save & New
Cancel
My Service Journey

InthesamewayCreate**Courses,Instructors,**and**Enrolmentsobjects**

Milestone3-Fields:

Table1:StudentObjectFields:

Table2:CourseObjectFields:

Table3:InstructorObjectFields:

FieldLabel	DataType
Instructor Name	Text (Standard)
Instructor Code	Text
Expertise	Picklist
Phone	Phone
Email	Email

Table4:EnrollmentObjectFields:

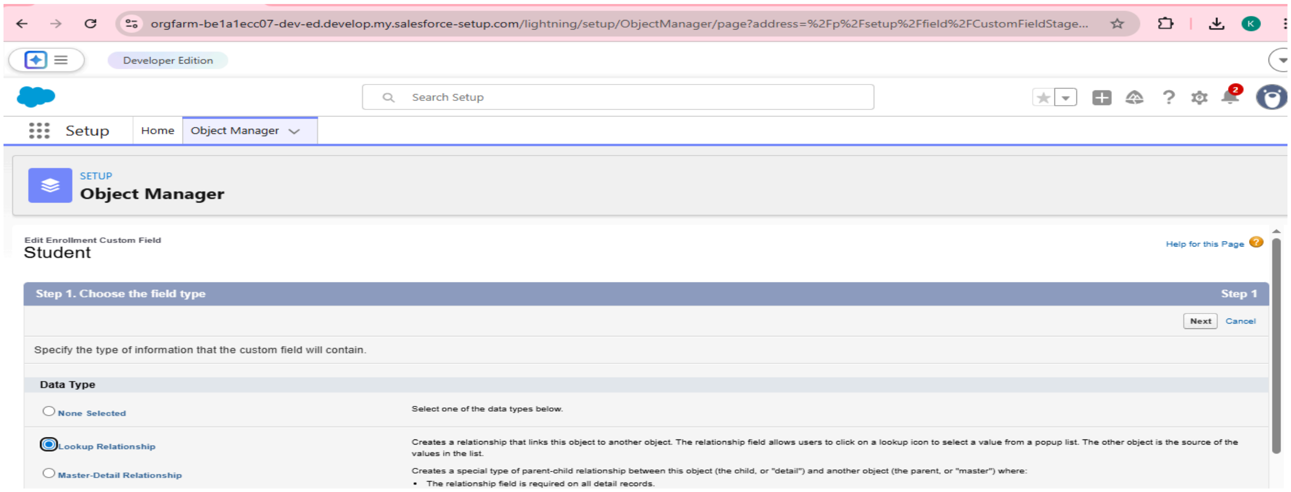
Field Label	DataType
Student	Lookup (Student)
Course	Lookup(Course)
Instructor	Lookup (Instructor)
Enrollment Date	Date
Enrollment Status	Picklist

Fees Paid	Checkbox
Total Amount	Currency
Comment s	TextArea

Milestone4–CreateRelationships:

1. **Activity1:CreateLookupfromEnrollmenttoStudent:**
    1. GotoSetup→clickObjectManager.
    2. TypeEnrollmentinQuickFind→clickEnrollment______cobject.
    3. ClickFields&Relationships→clickNew.
    4. SelectLookupRelationship→clickNext.
    5. ForRelatedTo,selectStudent____c→click Next.

6. EnterFieldLabel:Student(APIName:Student_____c).
7. ClickNextthroughField-LevelSecurityandLayoutoptions(ensure it's visible and added to layout).
8. ClickSave.

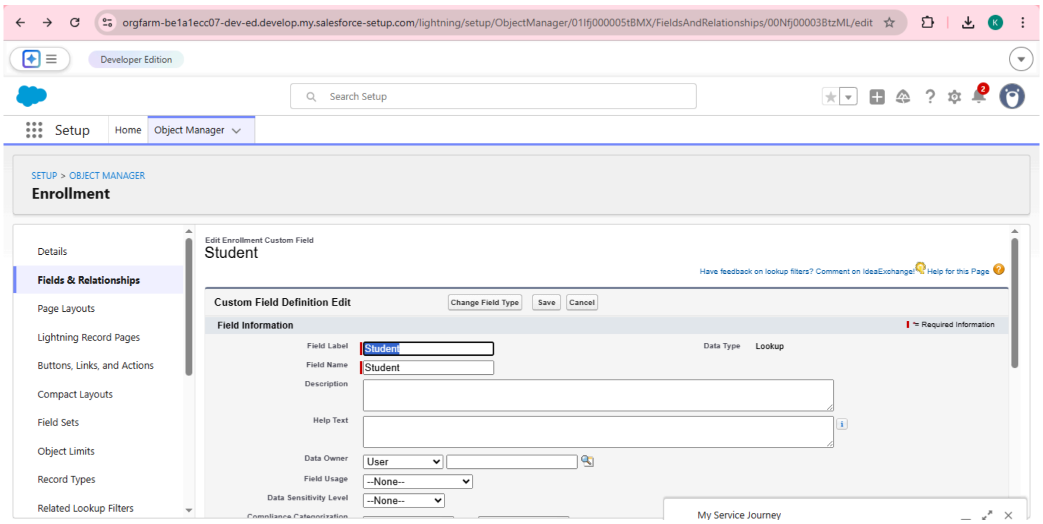


FieldLabel	DataType
StudentName	Text (Standard)
Email	Email
Phone	Phone
DateofBirth	Date
StudentStatus	Picklist
Address	TextArea

Field Label	DataType
Course Name	Text (Standard)
Category	Picklist
Duration	Number/Text
CourseFee	Currency
Description	TextArea

Activity2:CreateLookupfromEnrollmenttoCourse

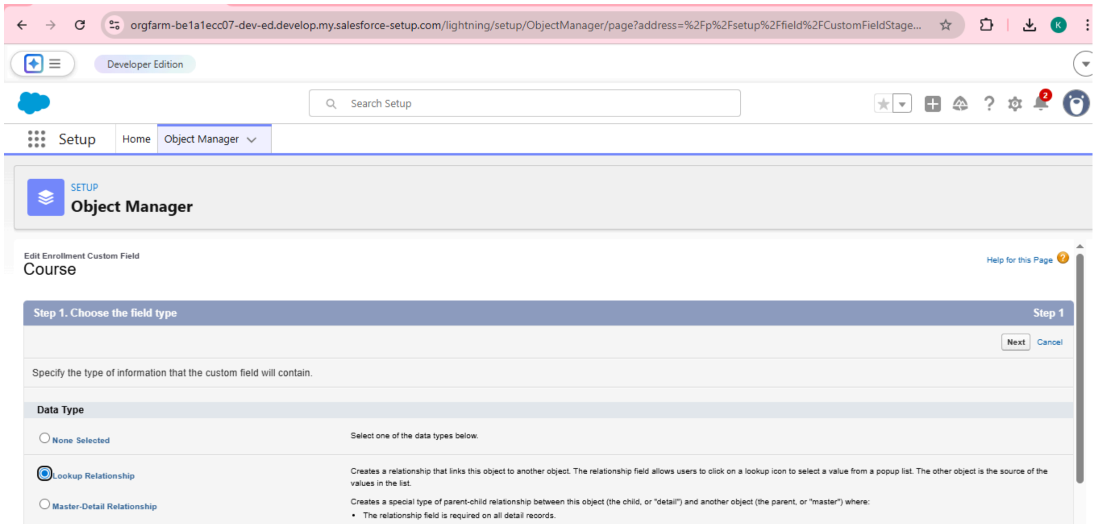
Purpose:

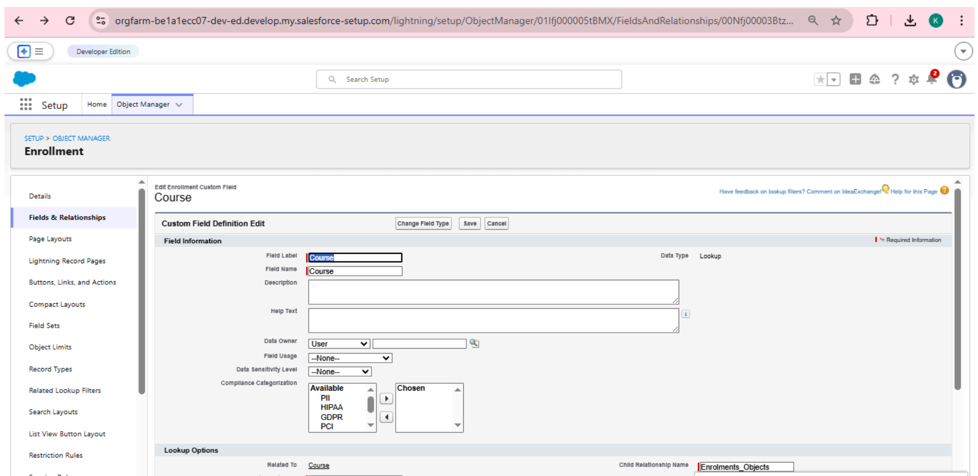


TolinkeachEnrollmenttoaCourse.

Steps:

1. GotoSetup→ObjectManager→Enrollment______c.
2. ClickFields&Relationships→New.
3. SelectLookupRelationship→Next.
4. RelatedTo:selectCourse____c→click Next.
5. FieldLabel:Course(APIName:Course_____c).
6. ClickNext(setvisibilityandlayout)→Save.



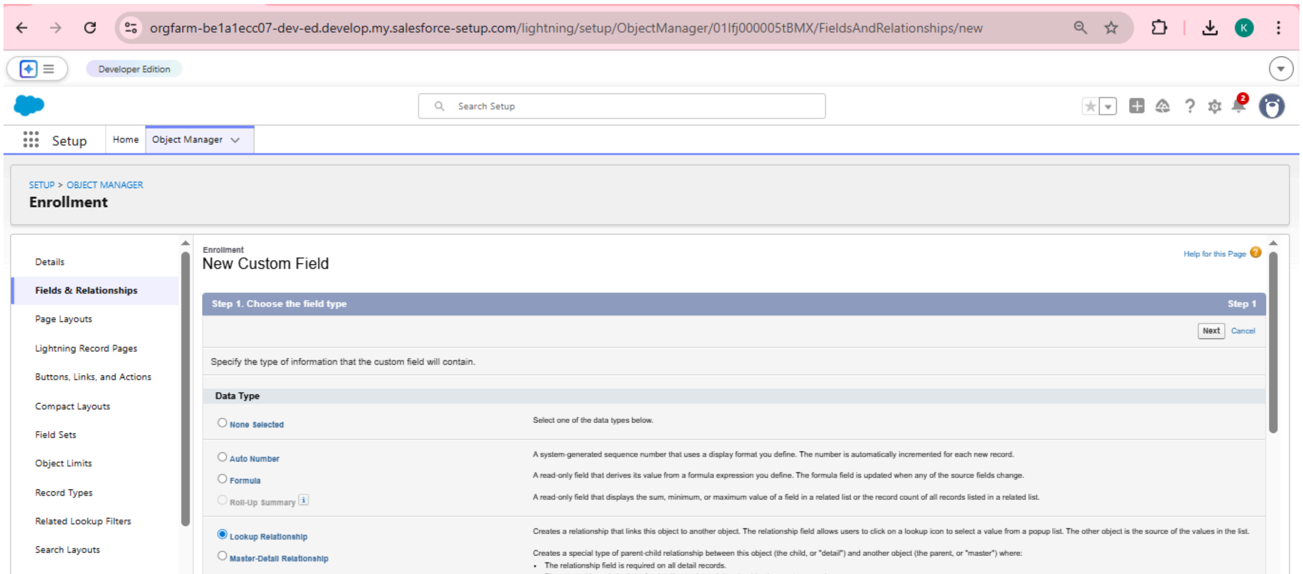


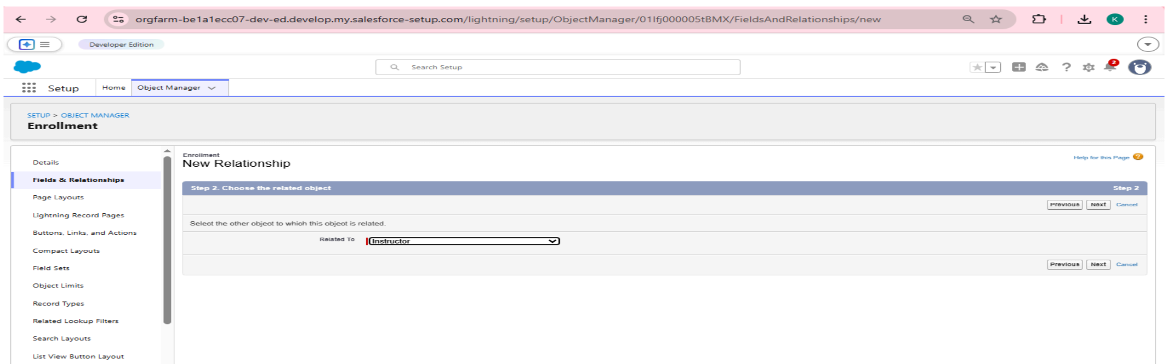
Activity3:CreateLookupfromEnrollmenttoInstructor:

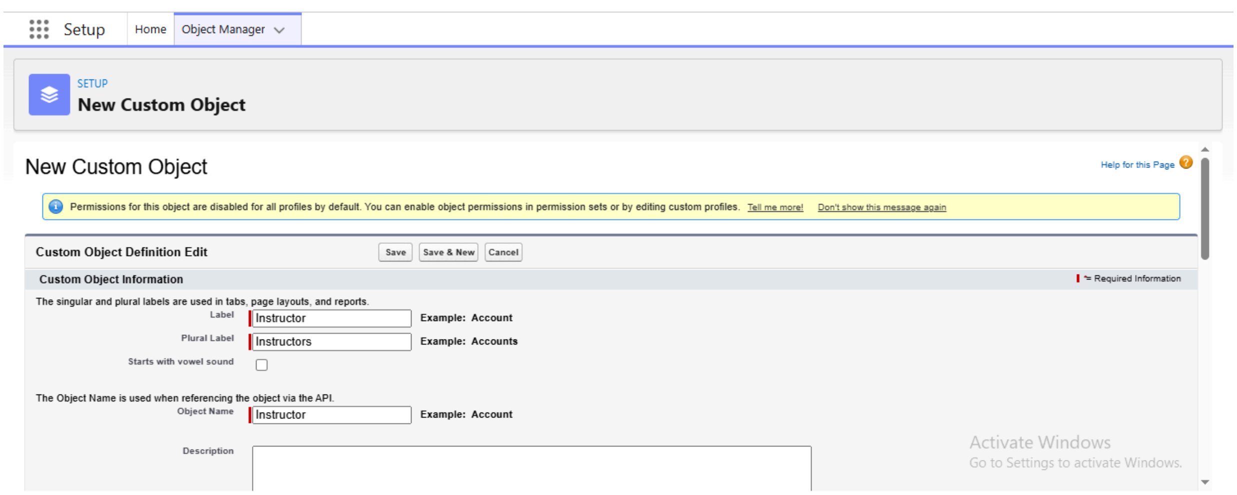
Purpose:
TostorewhichInstructorisassignedtoaparticularEnrollment.

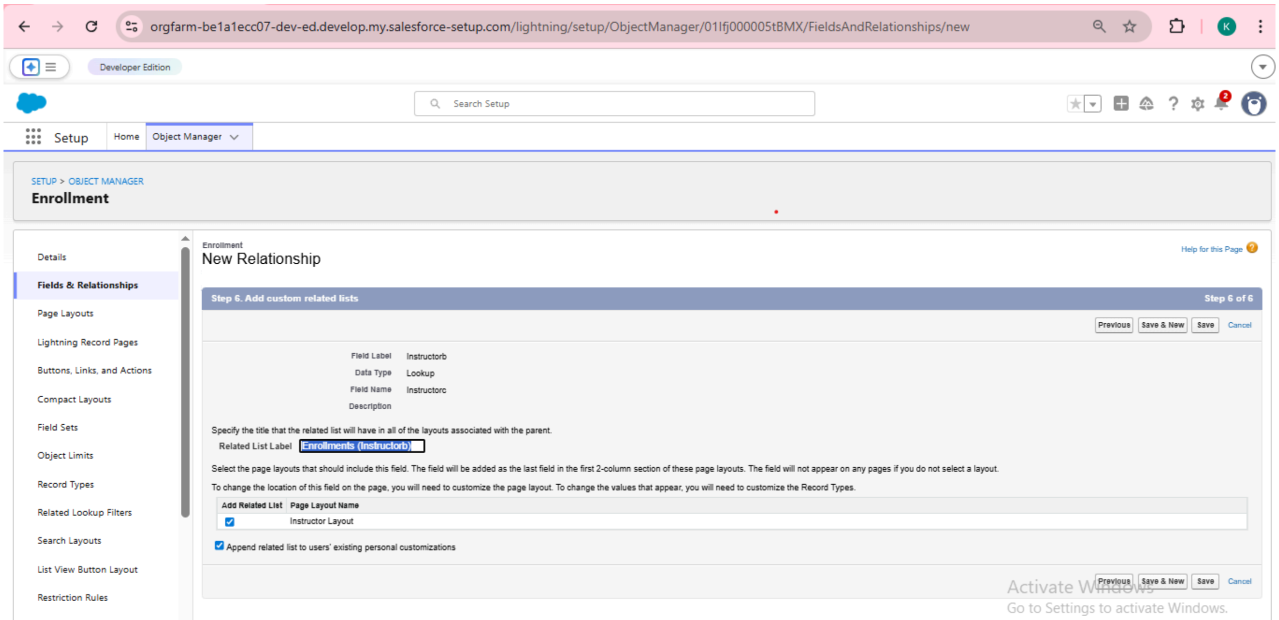
Steps:

1. GotoSetup→ObjectManager→Enrollment______c.
2. ClickFields&Relationships→New.
3. ChooseLookupRelationship→Next.
4. RelatedTo:selectInstructor____c→Next.
5. FieldLabel:Instructor(APIName:Instructor_____c).
6. CompleteField-LevelSecurityandPageLayoutoptions→Save


orgfarm-be1a1ecc07-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01Ifj000005tBMX/FieldsAndRelationships/new
Developer Edition
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Enrollment
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
Enrollment
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.


orgfarm-be1a1ecc07-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01Ifj000005tBMX/FieldsAndRelationships/new
Developer Edition
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Enrollment
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
Enrollment
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
Instructor


Setup
Home
Object Manager
SETUP
New Custom Object
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Instructor
Example: Account
Plural Label
Instructors
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Instructor
Example: Account
Description
Activate Windows
Go to Settings to activate Windows.



Milestone5–ValidationRules:

Activity1:StudentEmailDomainValidation

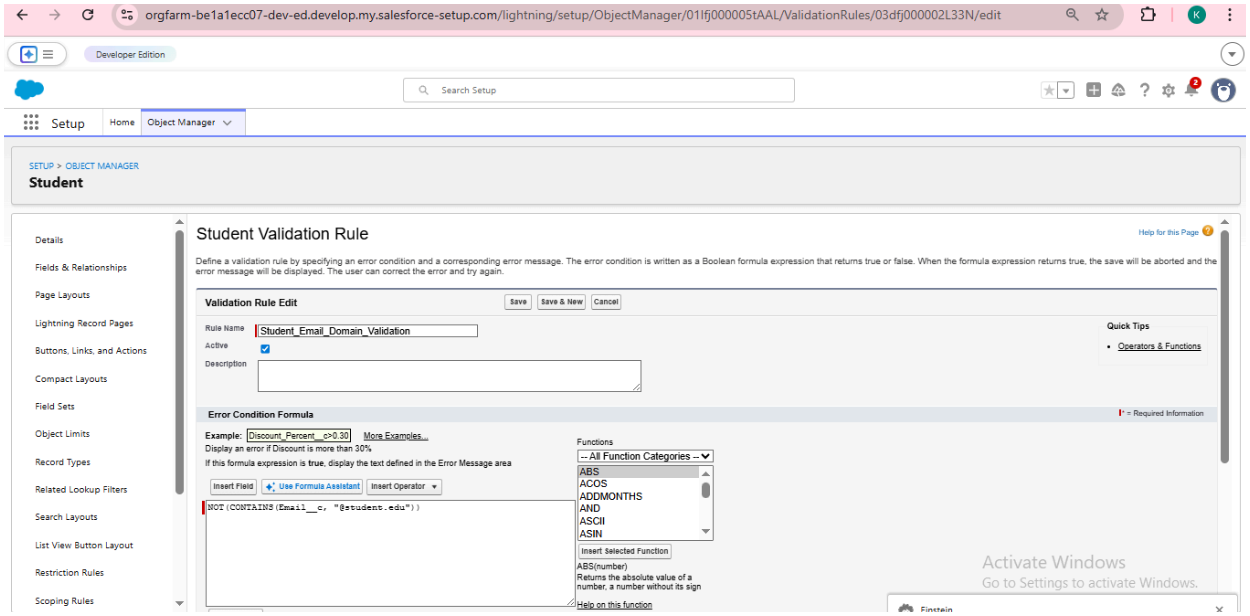
Purpose:
Toensurestudentsuseonlyallowedinstitutionalemailaddresses.

Steps:

Go to Setup → Object Manager → Student__c.
Click Validation Rules → New.
Rule Name: Student_Email_Domain_Validation.
ErrorConditionFormula:(examplefor@student.edu)

- NOT(CONTAINS(Email__c,"@student.edu"))

ErrorMessage:Emailmustbeavalidstudentinstitutionalemail. Error Location: Field → Email_______c.
ClickSave.



Activity2:FeesMustBePaidBeforeApproval

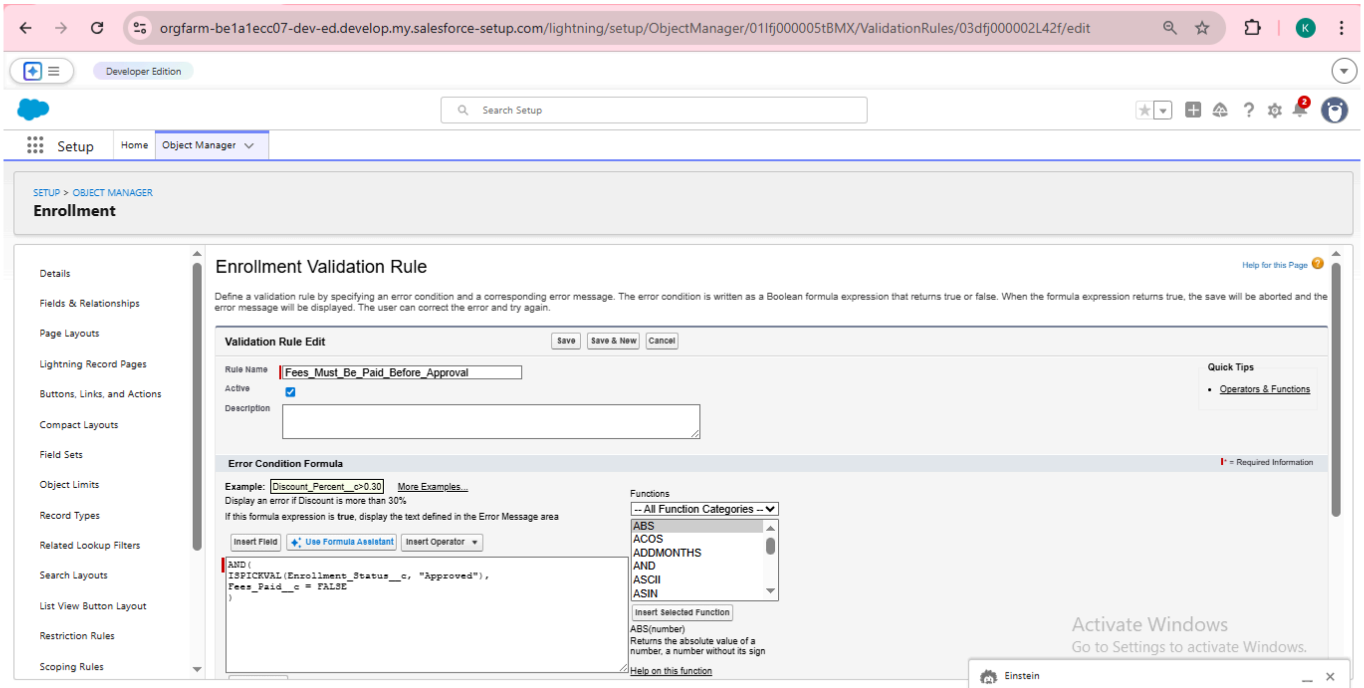
Purpose:
PreventEnrollmentfrombeingapproveduntilfeesarepaid. Steps:

1. GotoSetup→ObjectManager→Enrollment______c.
2. ClickValidationRules→New.
3. RuleName:Fees_Must_Be_Paid_Before_Approval.
4. ErrorConditionFormula:

```
AND(
  ISPICKVAL(Enrollment_Status__c,"Approved"),
  Fees_Paid__c = FALSE
)
```

5. ErrorMessage:Feesmustbepaidbeforeapprovinganenrollment.
6. ErrorLocation:TopofPage(orfieldasneeded).

Click Save.



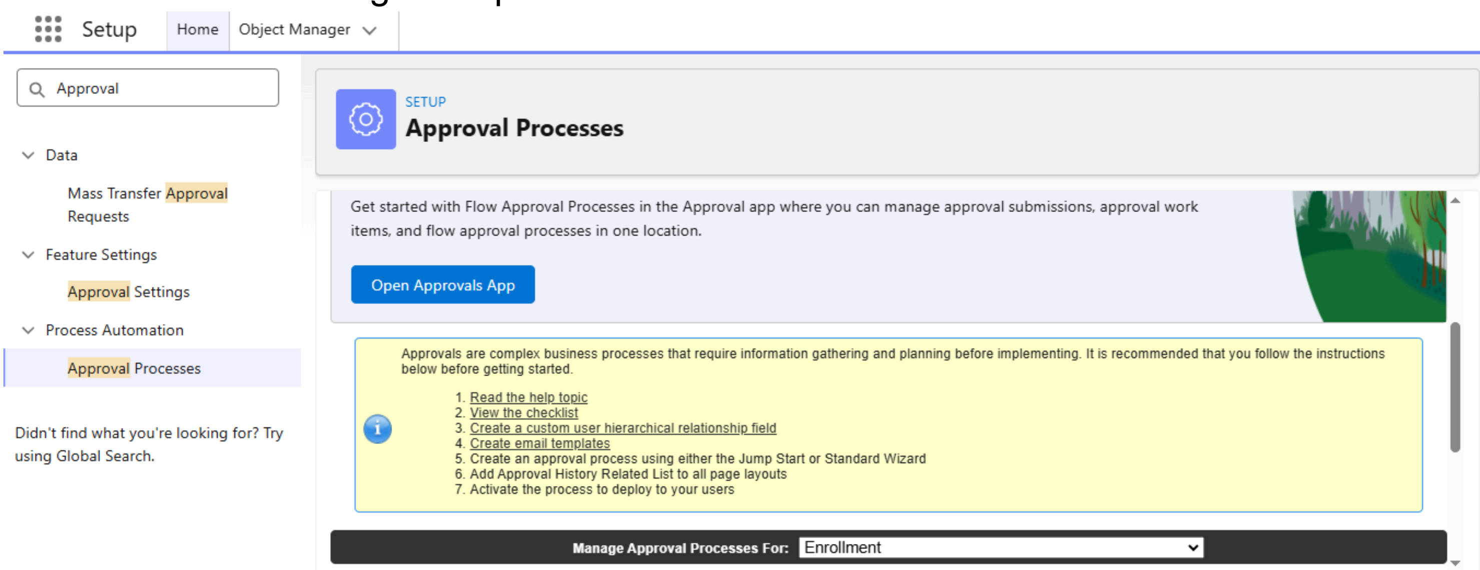
Milestone6–ApprovalProcess

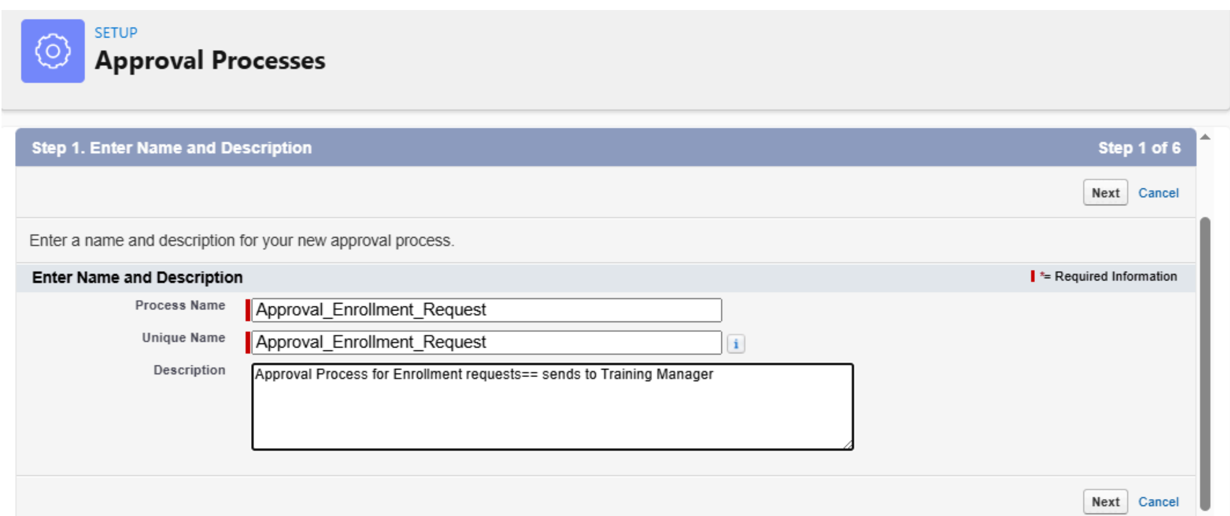
Activity1:CreateApprovalProcessforEnrollmentRequests

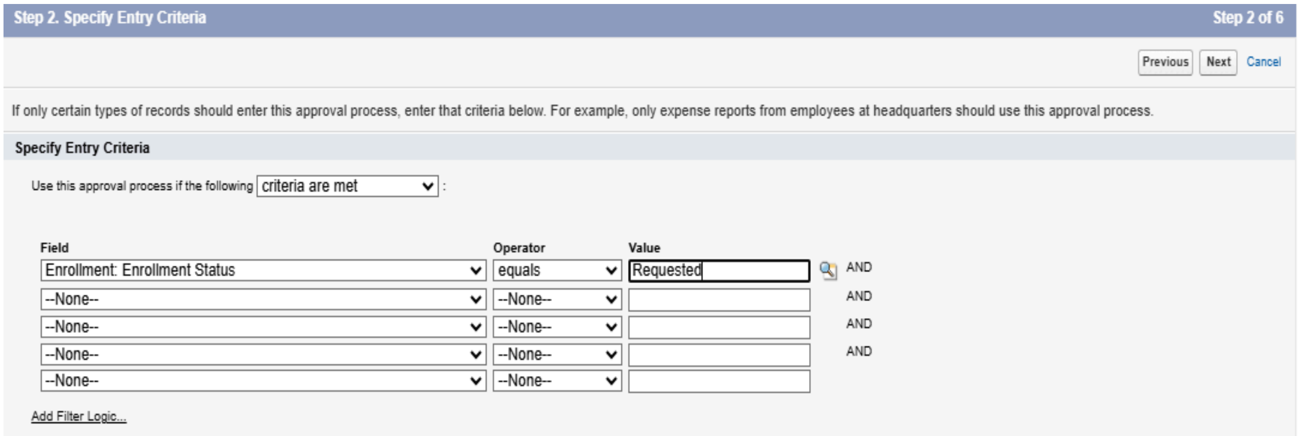
Purpose:
RouteEnrollmentrequeststoTrainingManagerforapprovalorrejection.

Steps:

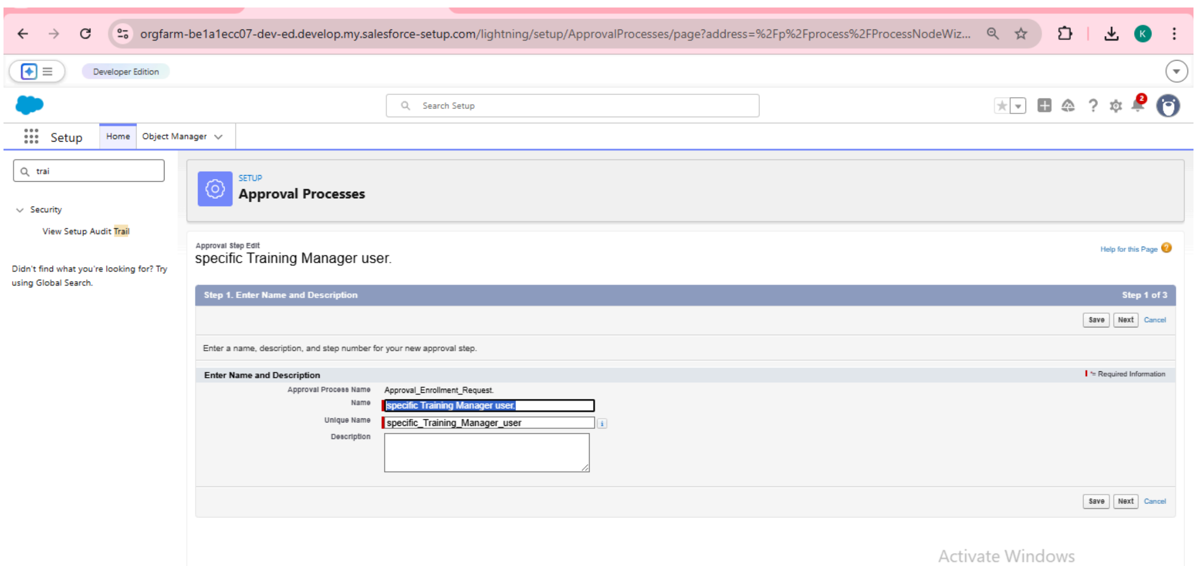
1. GotoSetup→ApprovalProcesses→selectEnrollment______c.
2. ClickCreateNewApprovalProcess→UseStandardSetup.
3. ProcessName:Approval_Enrollment_Request.
4. EntryCriteria:Enrollment_Status___c="Requested".
5. Saveandconfiguresteps.



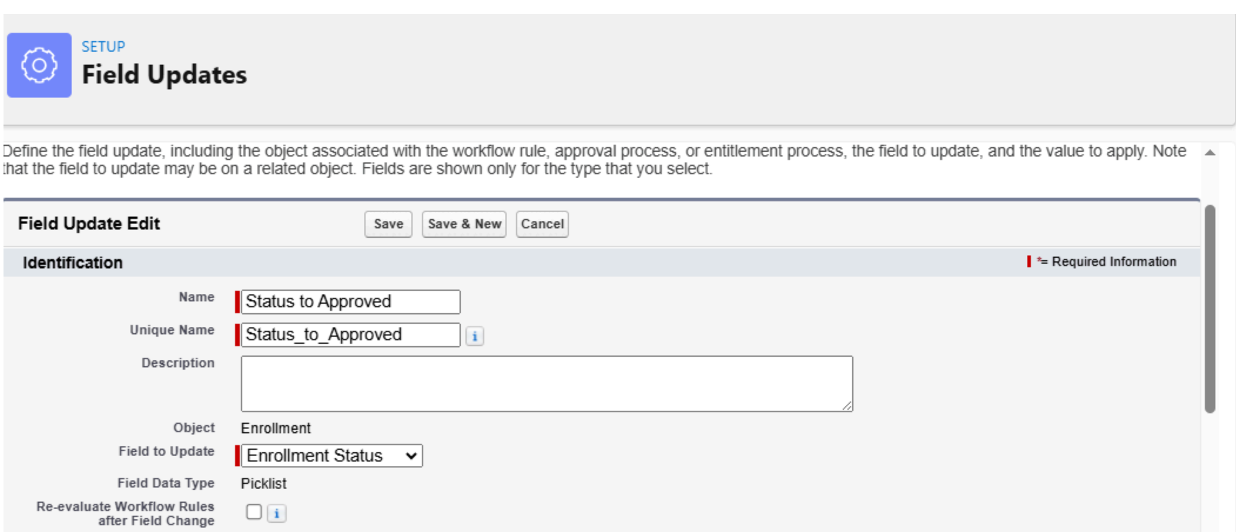




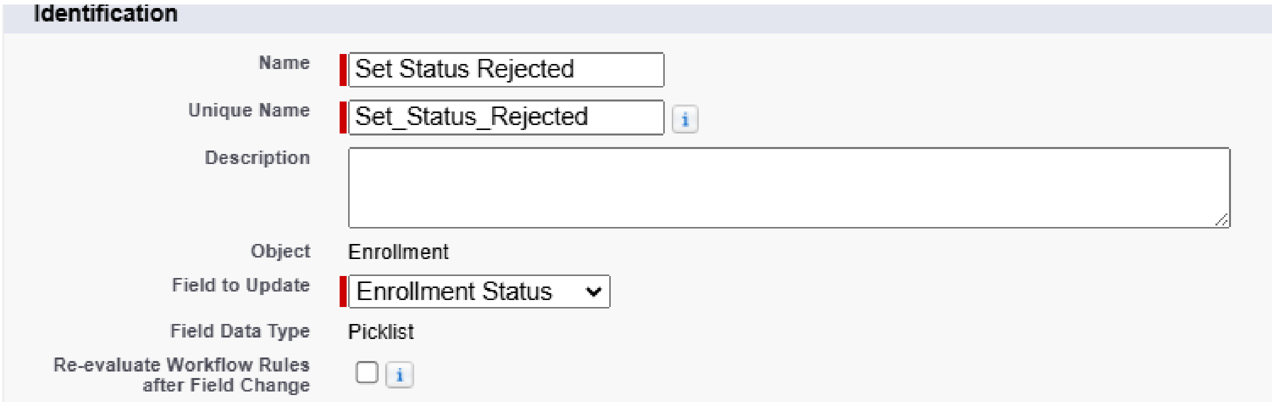
6. AddApprovalStep:
7. Approver:specificTrainingManageruser.



8. UnderFinalApprovalActions:
9. AddFieldUpdatetosetEnrollment_Status_____c="Approved".



10. UnderFinalRejectionActions:
11. AddFieldUpdatetosetEnrollment_Status____c="Rejected".



12. AddEmailAlerttosendrejectionemailtostudent.

13. Activatetheapprovalprocess.

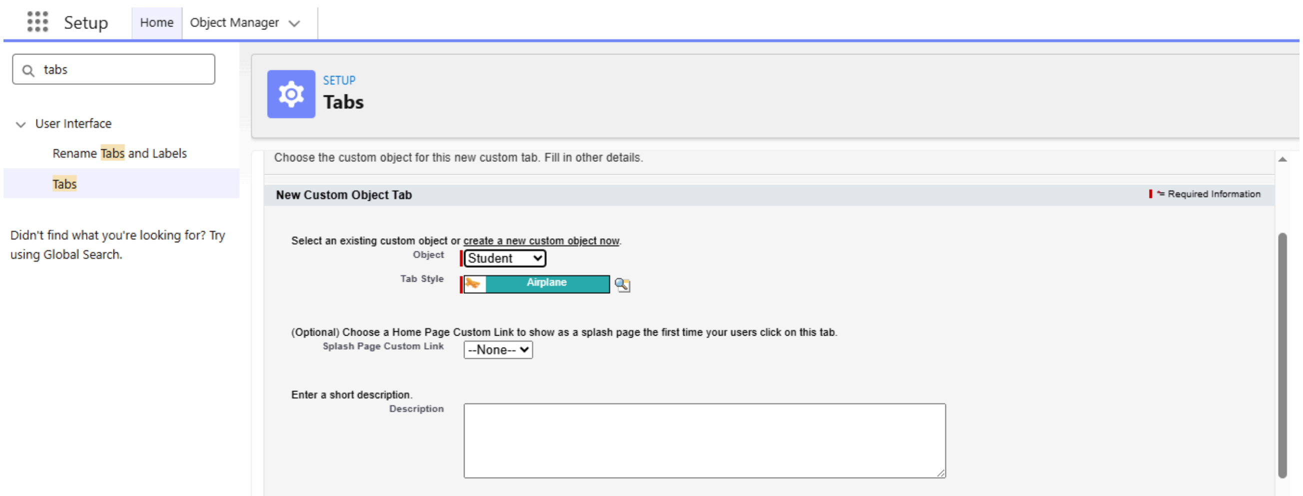
Milestone7-Tabs

Activity1:CreatingaTabfortheStudentObject:

Goto Setup.

1. IntheQuickFindbox,typeTabs.
2. UnderCustomObjectTabs,clickNew.
3. SelectStudentfromtheobjectlist.

4. Chooseatabstyle(icon).
5. ClickNext,assignittoallprofiles,andthenclickSave.



Activity2:CreatingRemainingTabs

NowcreatetheTabsfortheremainingObjects,theyare“Courses,Instructors, Enrollment”.
FollowthesamestepsasmentionedinActivity-1

Milestone8-TheLightningApp

Activity1:CreatingtheLightningApplicationfortheProject

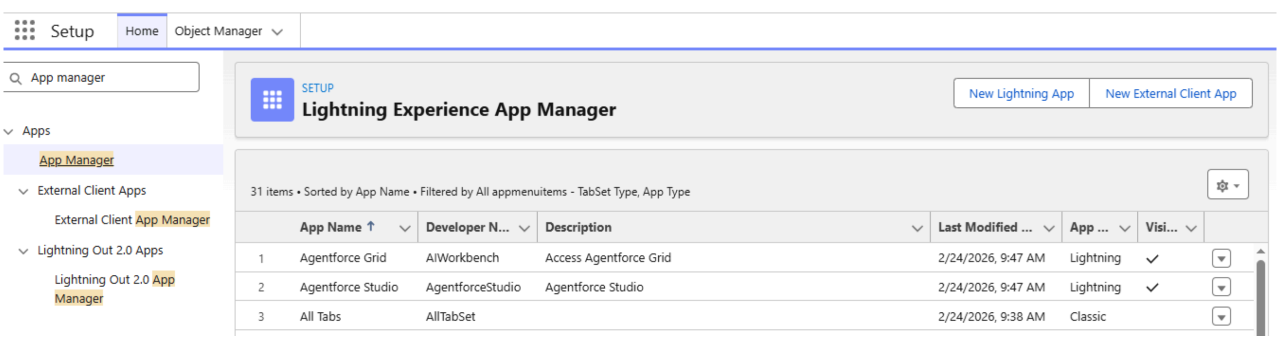
NavigatetoSetup.

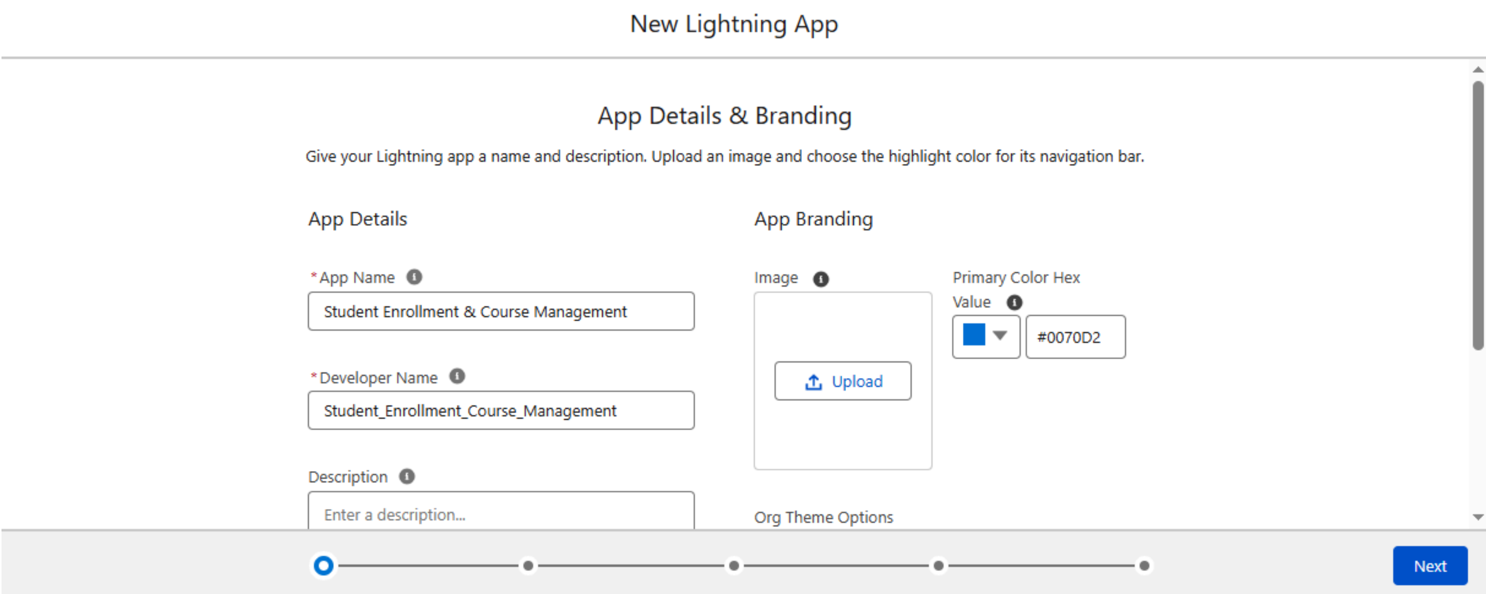
EnterAppManagerintheQuickFindsearchbox. Click
New Lightning App.

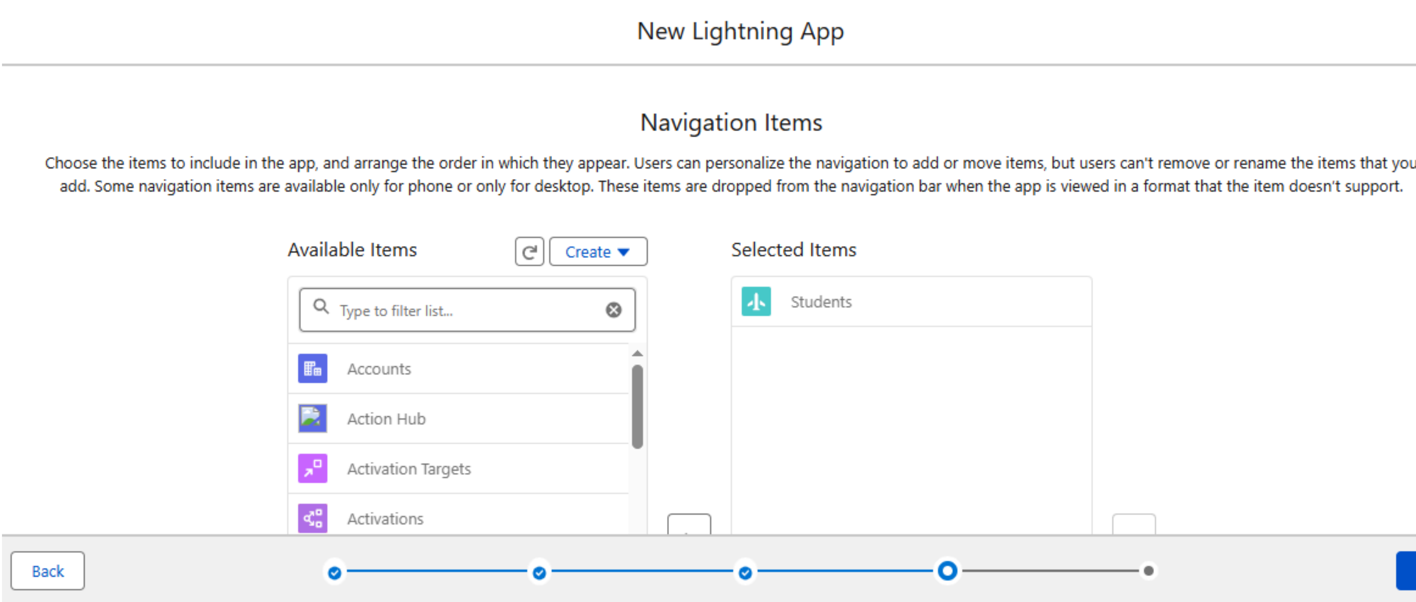
Providetheappdetails:
AppName:StudentEnrollment&CourseManagement Developer
Name auto-fills
Description:Optional,butcandescribethepurposeoftheapp Click
Next and choose the following settings:
AppBranding(optional):Addlogoorselectcolortheme Navigation
Style: Choose Standard Navigation
ClickNextandassigntheapptospecificprofiles(e.g.,**Admin,Enrollment Officer, Instructor**).
ClickNexttoselecttheitems(tabs)tobeincludedintheapp. Add:

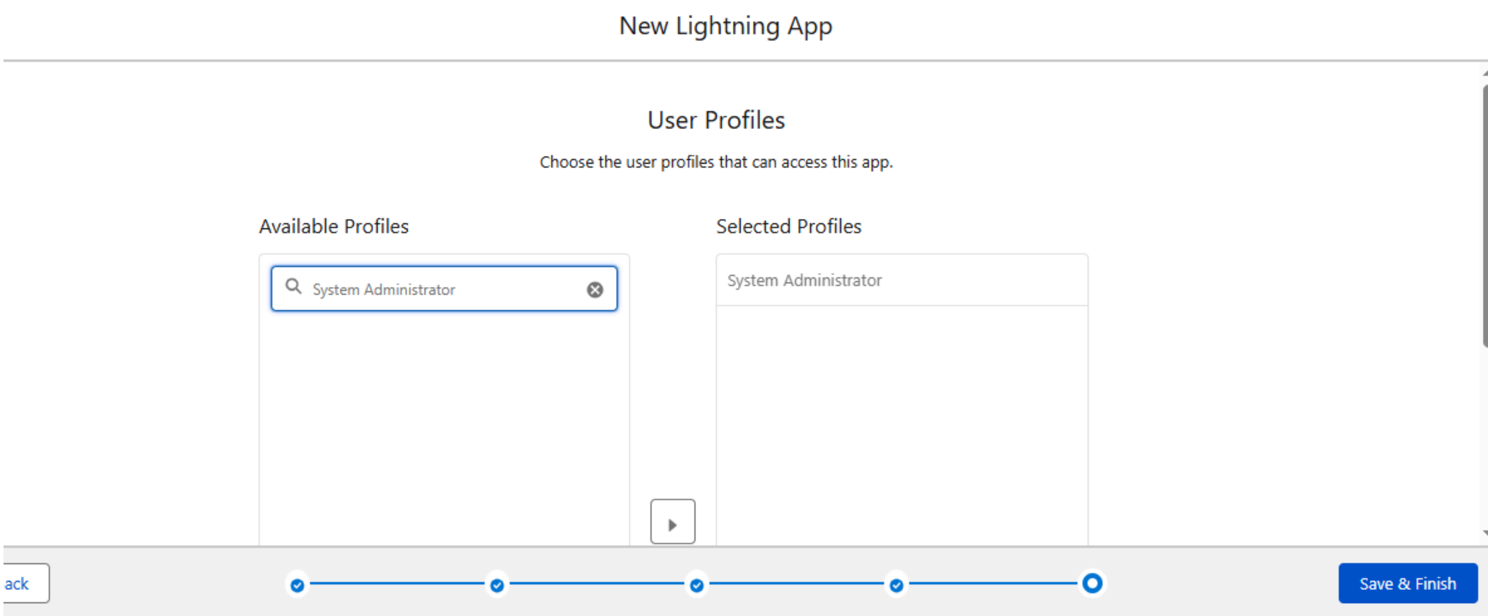
1. Student
2. Course
3. Instructor
4. Enrollment
5. Reports
6. Dashboards
7. Home
8. Tasks

ClickNextandreviewtheappsettings. Finally,
click Save & Finish.




New Lightning App
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
*App Name
Student Enrollment & Course Management
*Developer Name
Student_Enrollment_Course_Management
Description
Enter a description...
Image
Upload
Primary Color Hex Value
#0070D2
Org Theme Options
Next


New Lightning App
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Type to filter list...
Accounts
Action Hub
Activation Targets
Activations
Selected Items
Students
Back



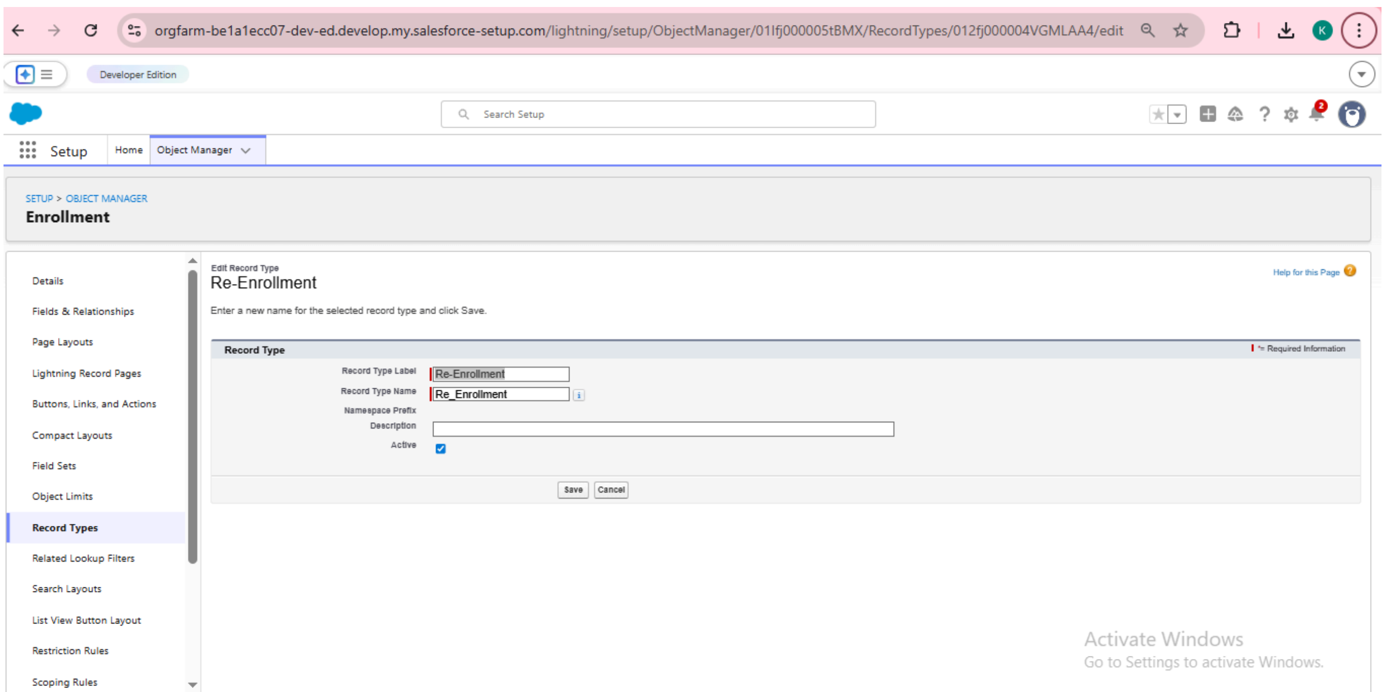
Milestone9–PageLayoutsandRecord:

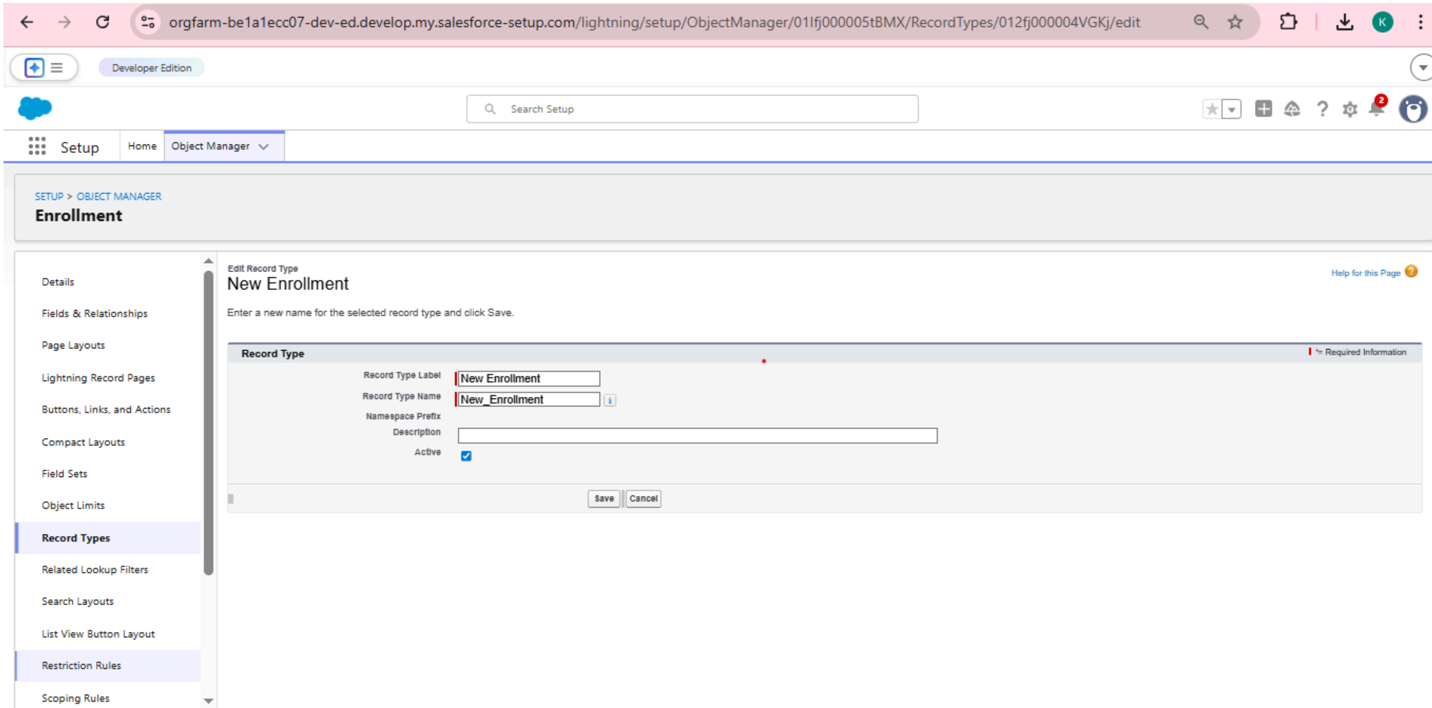
Activity1:CreateRecordTypesforEnrollment:

Purpose:
ToseparateNewEnrollmentvsRe-Enrollmentprocesses.
Steps:
1. GotoSetup→ObjectManager→Enrollment__c.

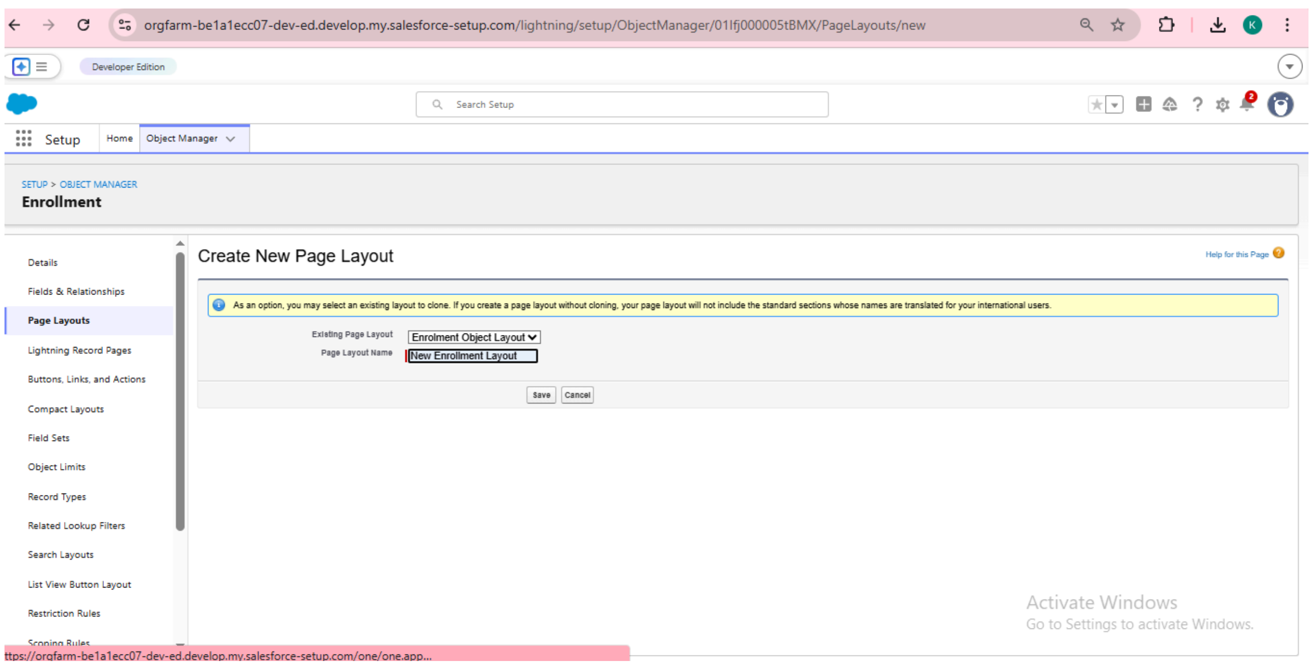
2. ClickRecordTypes→New.
3. Forthefirstrecordtype:
   - ExistingRecordType:Master
   - RecordTypeLabel:NewEnrollment
   - Enableforrequiredprofiles(Admin,EnrollmentOfficer).
   - SelectthedefaultPageLayout→Save& New.
4. Forthesecondrecordtype:
   - RecordTypeLabel:Re-Enrollment
   - Enableforsameprofiles.
   - SelectthedefaultPageLayout→Save.

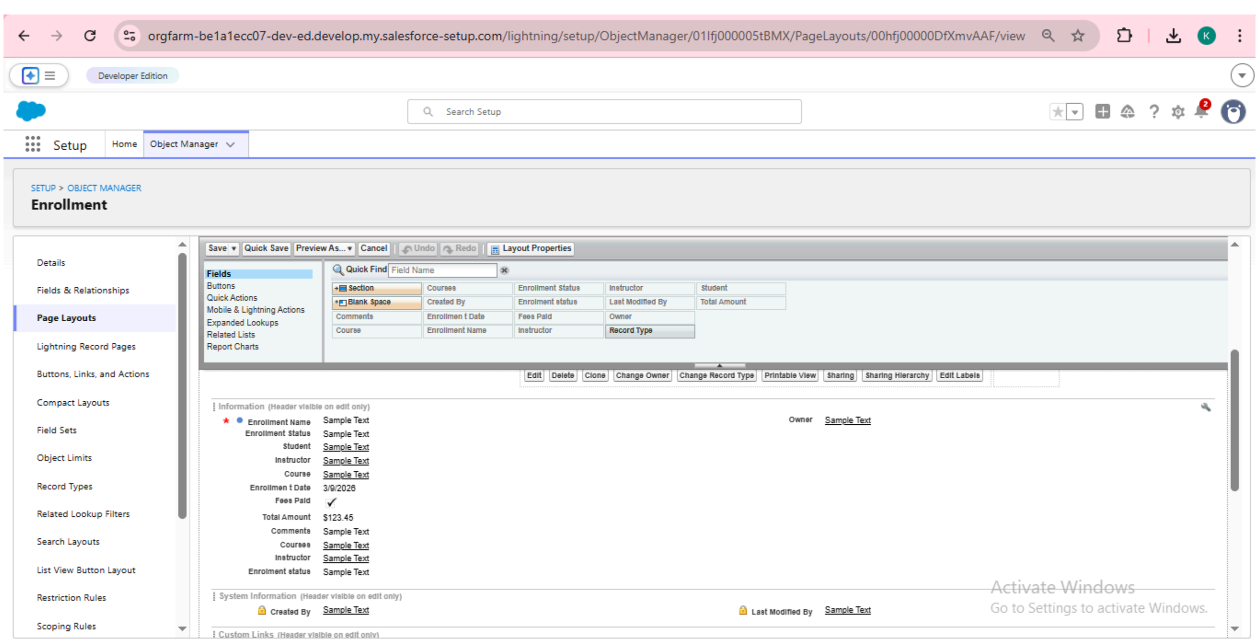
Activity2:SeparatePageLayoCreateutsforEachEnrollmentRecord Type




orgfarm-be1a1ecc07-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01Ifj000005tBMX/RecordTypes/012fj000004VGKj/edit
Developer Edition
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Enrollment
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
Scoping Rules
Edit Record Type
New Enrollment
Help for this Page
Enter a new name for the selected record type and click Save.
Record Type
= Required Information
Record Type Label
New Enrollment
Record Type Name
New_Enrollment
Namespace Prefix
Description
Active
Save
Cancel

Purpose:
ToshowdifferentfieldsforNewEnrollmentvsRe-Enrollment. Steps:

1. Enrollment__cobject→clickPageLayouts.
2. ClickNewtocreatealayoutforNewEnrollment:
   - ClonefromexistingEnrollmentLayout→nameitNewEnrollment Layout → Save.
   - Keepfieldsrelevantforfirst-timeenrollment:Student,Course, Instructor, Enrollment Date, Status, Fees, etc.
   - Removeunnecessaryre-enrollmentfieldsifany.
   - ClickSave.
   - 



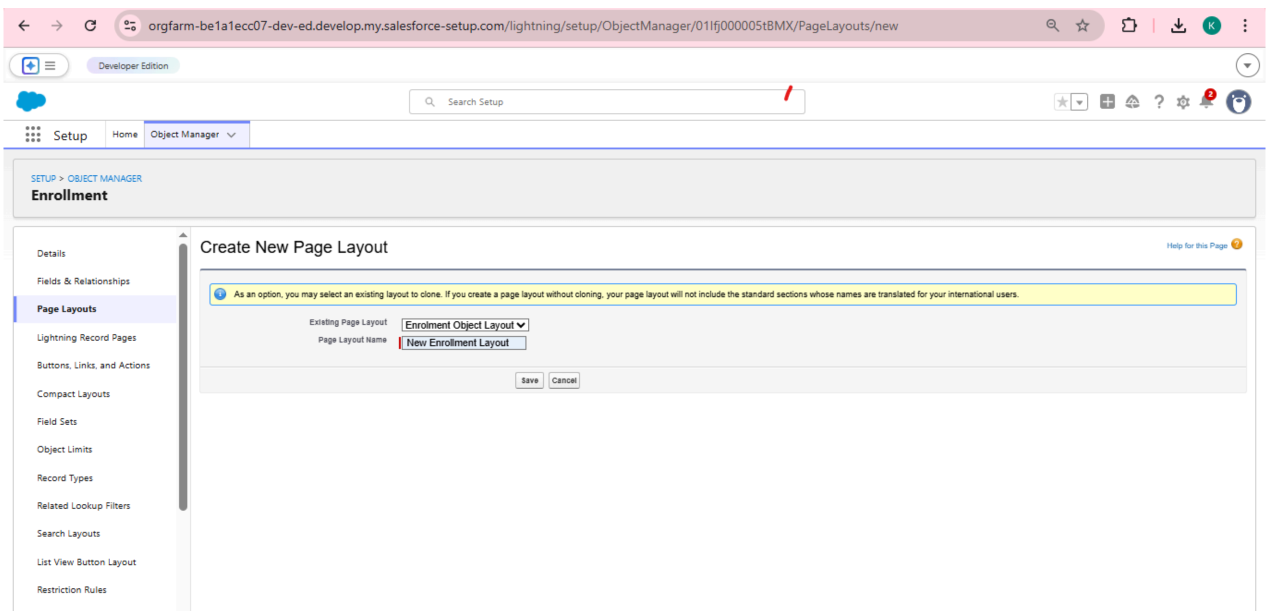
3. Again,clickNewtocreateRe-EnrollmentLayout:

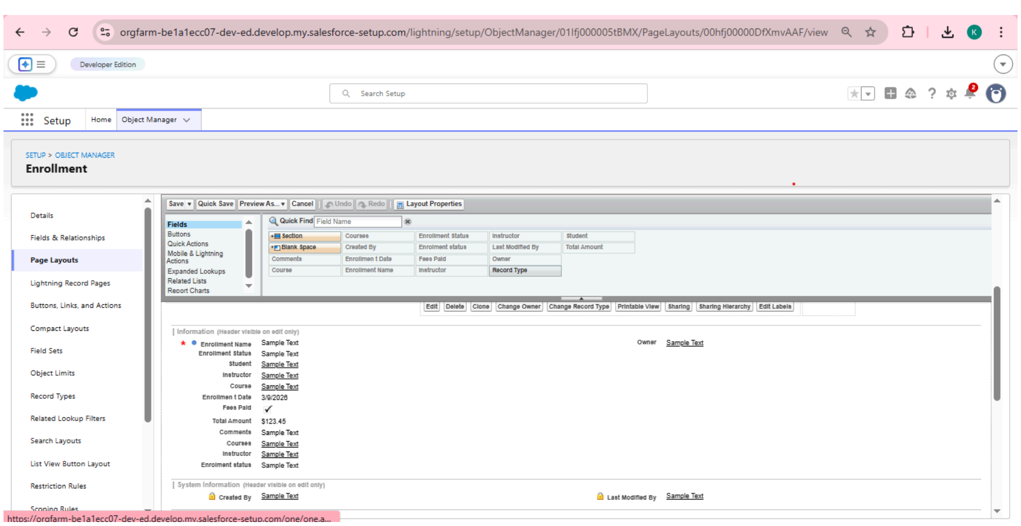
- Cloneexistinglayout→nameitRe-EnrollmentLayout→Save.
- IncludefieldslikepreviousEnrollmentreference(ifany), Re-Enrollment Reason, Status, Fees, etc.
- ClickSave.

4. ClickPageLayoutAssignment→EditAssignment.
5. Foreachprofileandrecordtype:

- NewEnrollment→useNewEnrollmentLayout.

6.Re-Enrollment → use Re-Enrollment Layout.
ClickSave.





Activity3:EnrollmentRAddelatedListstoParentObjects:

Purpose:
ToseeallEnrollmentsfromStudent,Course,andInstructorrecords.
a) Student→EnrollmentRelatedList
Go to Setup → Object Manager → Student__c.
Click Page Layouts → open the main layout.
Inthepalette,selectRelatedLists.
DragEnrollmentsrelatedlistontothelayout.
Customize columns if needed → Save.
b) Course→EnrollmentRelatedList
Go to Object Manager → Course__c→PageLayouts.
Open layout → add Enrollments related list.
Save.
c) Instructor→EnrollmentRelatedList
Go to Object Manager → Instructor__c→PageLayouts.
Open layout → add Enrollments related list.
Save.

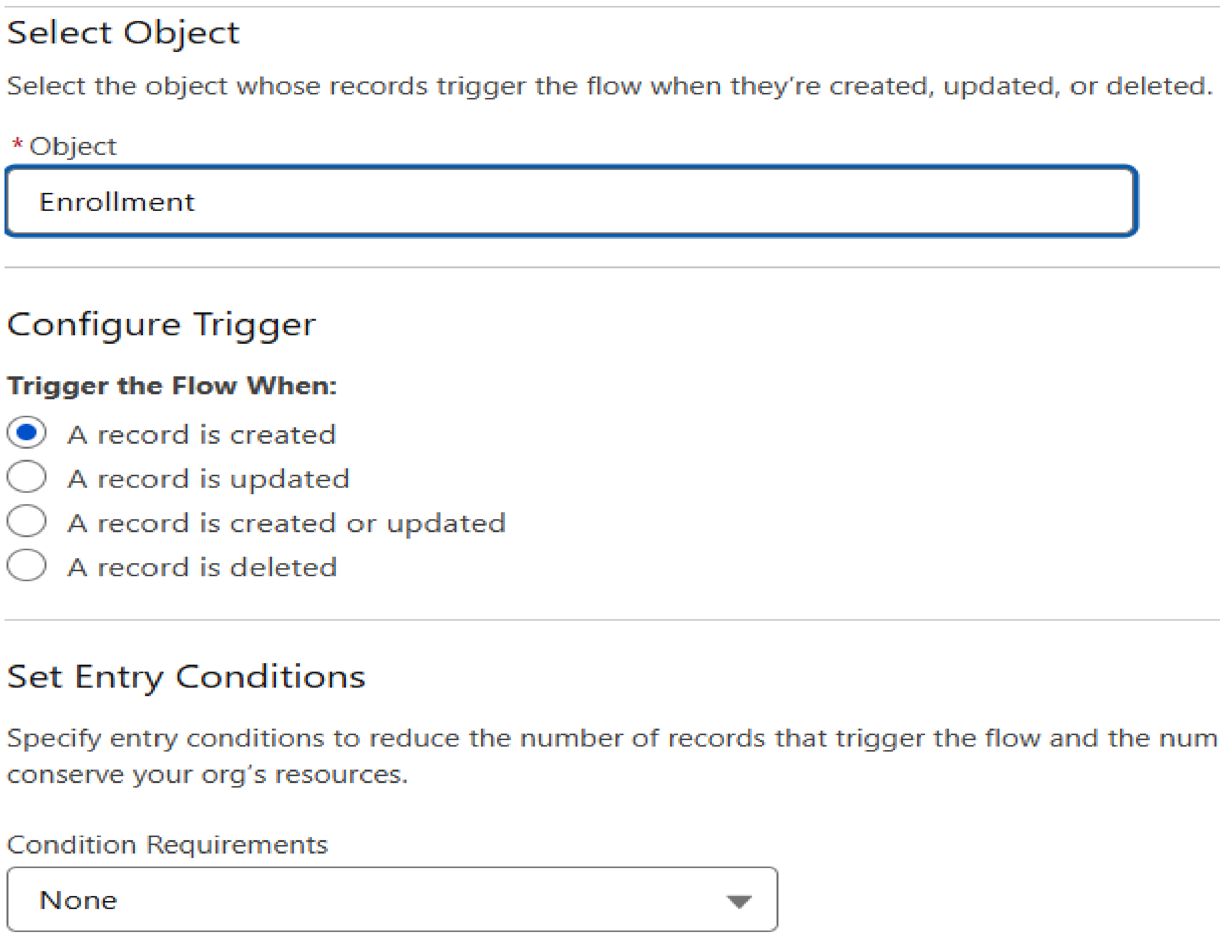
Milestone10–AutomationwithFlow

Activity1:Auto-PopulateEnrollmentDate(Record-TriggeredFlow)

Purpose:
SetEnrollment_Date___ctotodaywhenEnrollmentiscreated.

Steps:

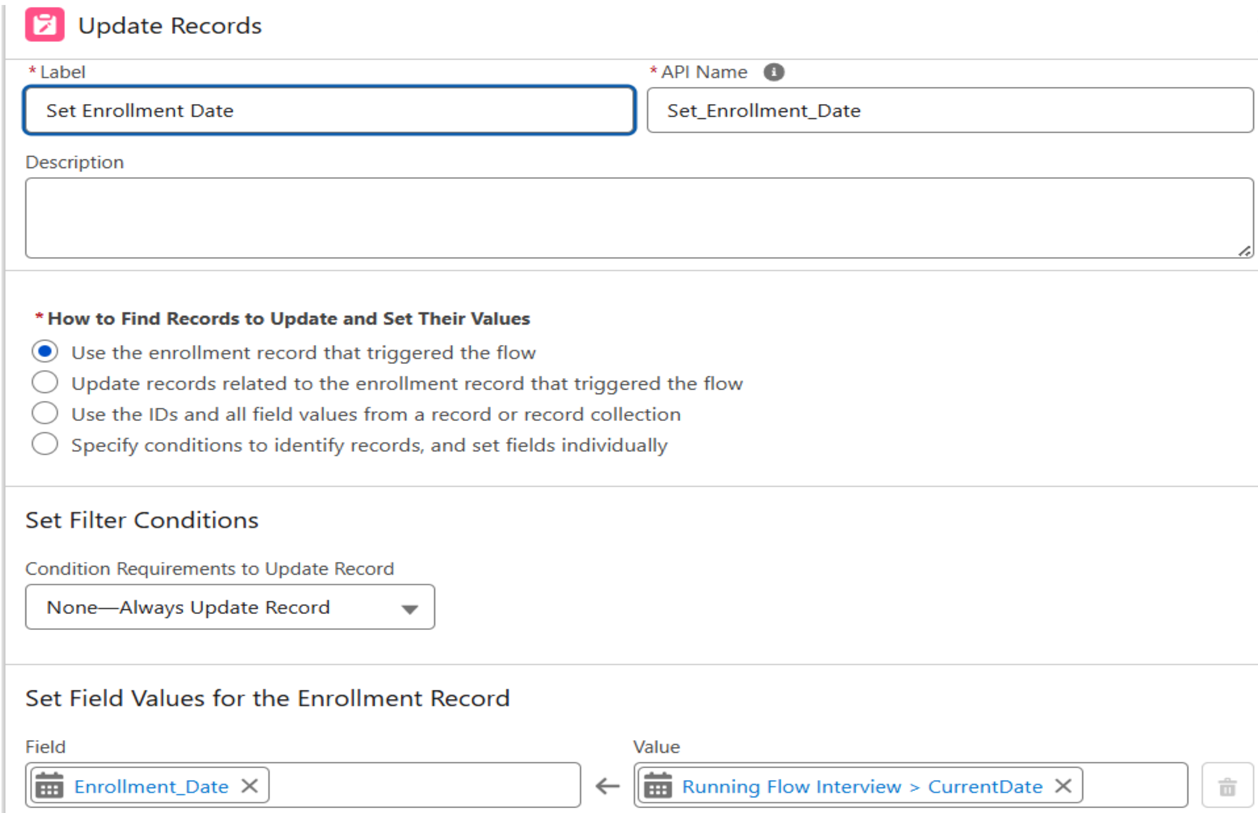
1. GotoSetup→Flows→New Flow.
2. SelectRecord-TriggeredFlow→Create.
3. Object:Enrollment__c.
4. Trigger:Arecordiscreated.
5. OptimizeforActionsandRelatedRecords→Done.



6. AddUpdateRecordselement:

- Label:SetEnrollmentDate.
- Userecordthattriggeredtheflow.
- Field:Enrollment_Date__c→Value:$Flow.CurrentDate.

7. SaveasSetEnrollmentDate→Activate.

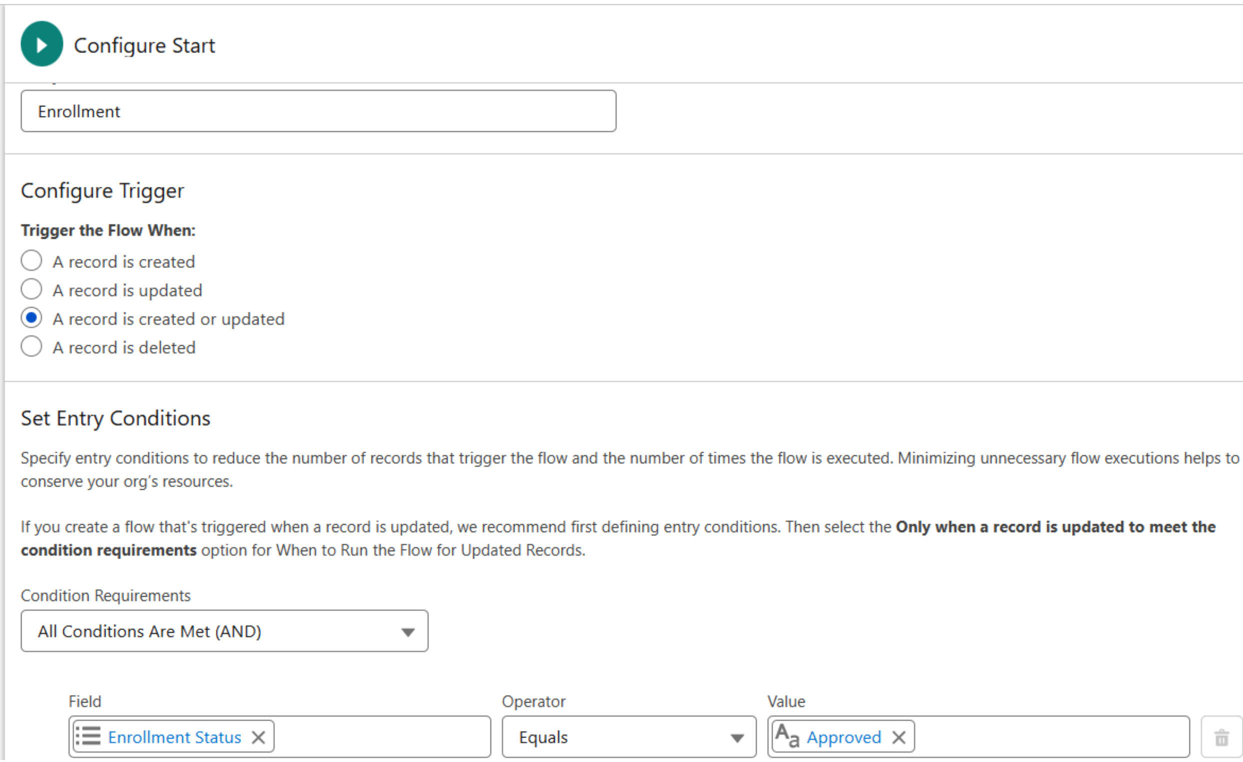


Activity2:SendEmailWhenEnrollmentApproved

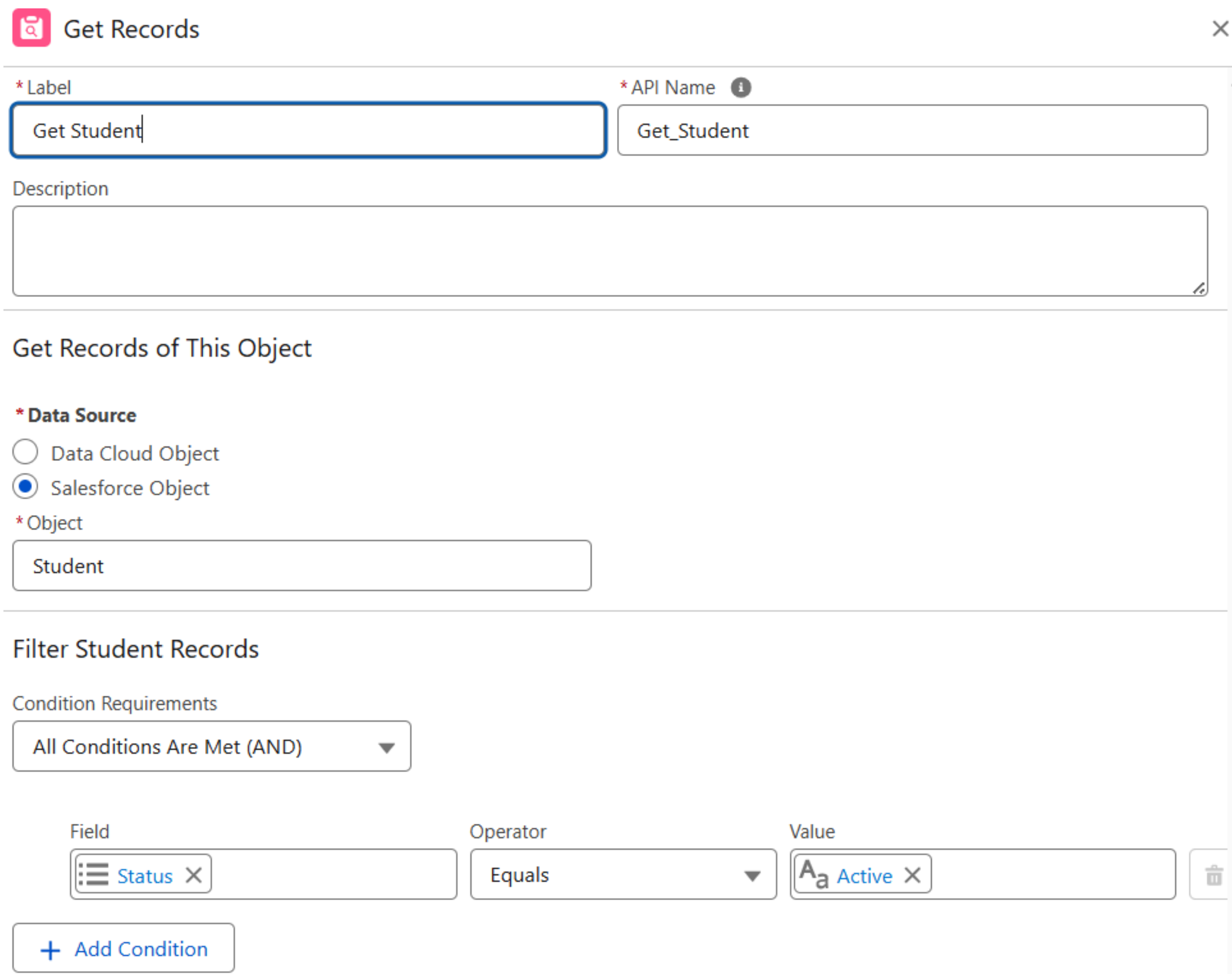
Purpose:
When Enrollment_Status__c=Approved,sendemail,alertadmin,andset Student to Active.
Steps(highlevelfordocument):

1. CreateEmailTemplateandEmailAlertforstudentnotification.

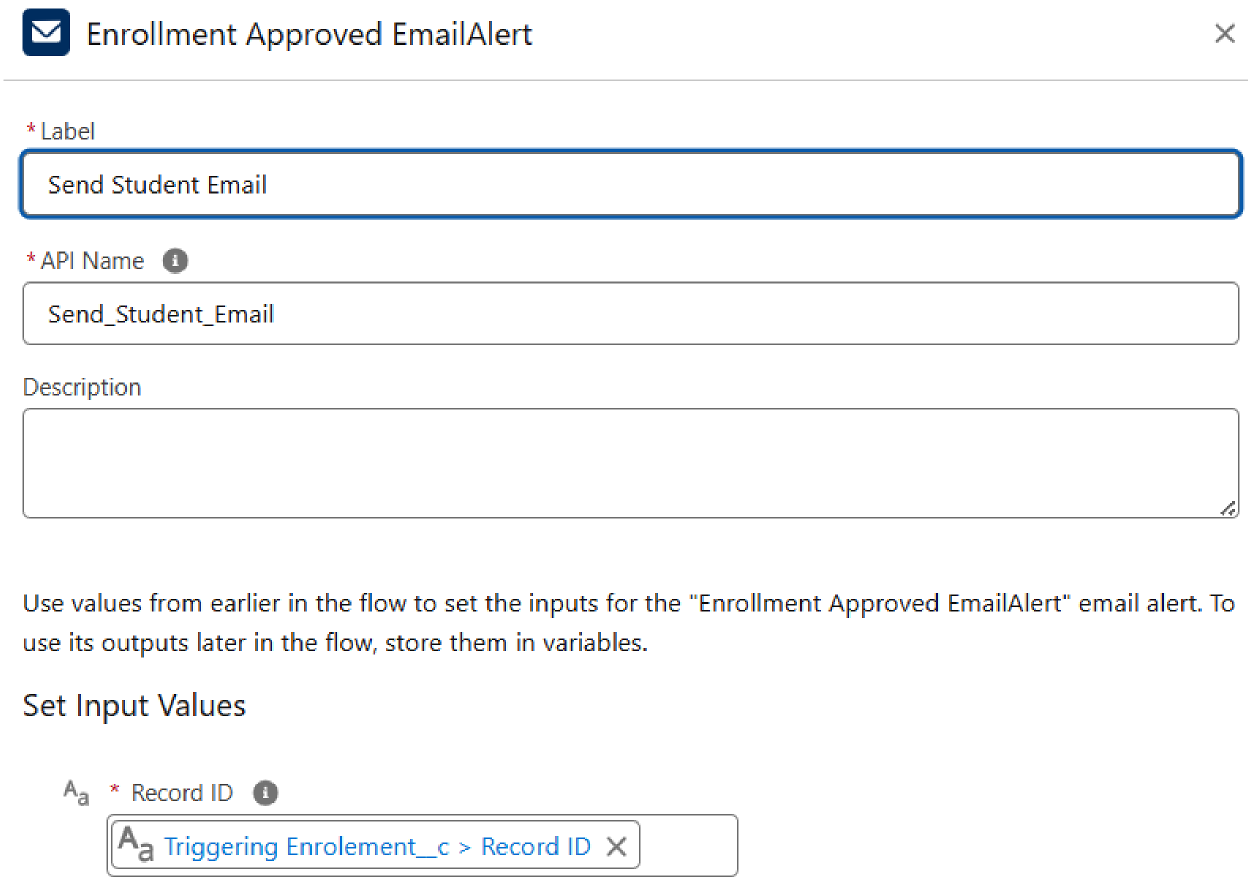
2. GotoFlows→New→Record-TriggeredFlow.
3. Object:Enrollment__c,Triggeronupdate.
4. Condition:Enrollment_Status__cEquals"Approved".



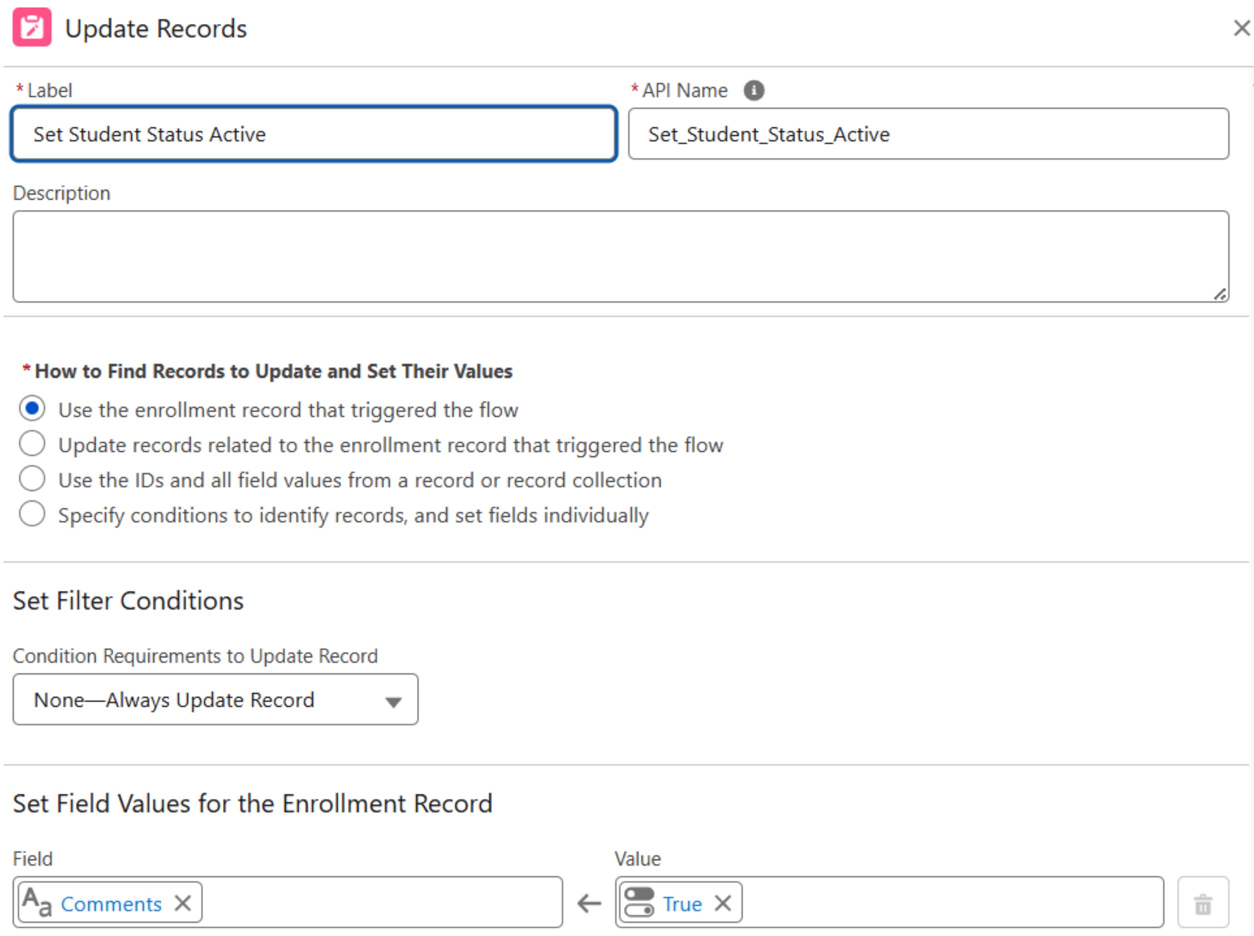
5. AddGetRecordstofetchrelatedStudent____c.



6. AddAction(EmailAlert)tosendemailtostudent.



7. AddActiontonotifyAdminifneeded.
8. AddUpdateRecordstosetStudent____c.Status__c="Active".



9. SaveasEnrollmentApprovedAction→Activate.

Activity3:Auto-AssignInstructorBasedonCourseCategory

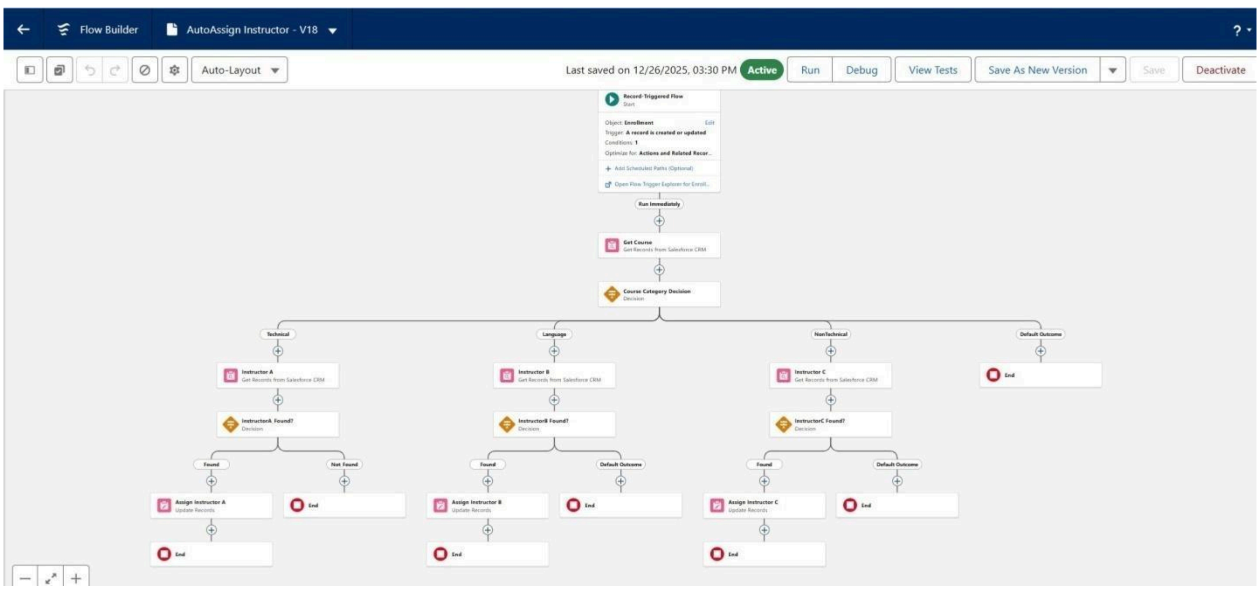
Purpose:
AssignInstructorautomaticallybasedonCoursecategory.

Rules:

Technical → Instructor A
Language → Instructor B
Non-Technical→InstructorC

Steps:

1. Prepare Instructor__crecordswithcodes(e.g.,INSTR_A,INSTR_B, INSTR_C).
2. CreateRecord-TriggeredFlowonEnrollment____c(created/updated).
3. AddGetRecordstofetchrelatedCourse______c.
4. AddDecisionelementonCourse_____r.Category__c:
5. Technical/Language/Non-Technicaloutcomes.
6. Foreachoutcome:
7. GetInstructorrecord(A/B/C)basedoncodeorname.
8. UpdateRecords:setInstructor____c=Get_Instructor_X.Id.
9. SaveasAutoAssign_Instructor→Activate.

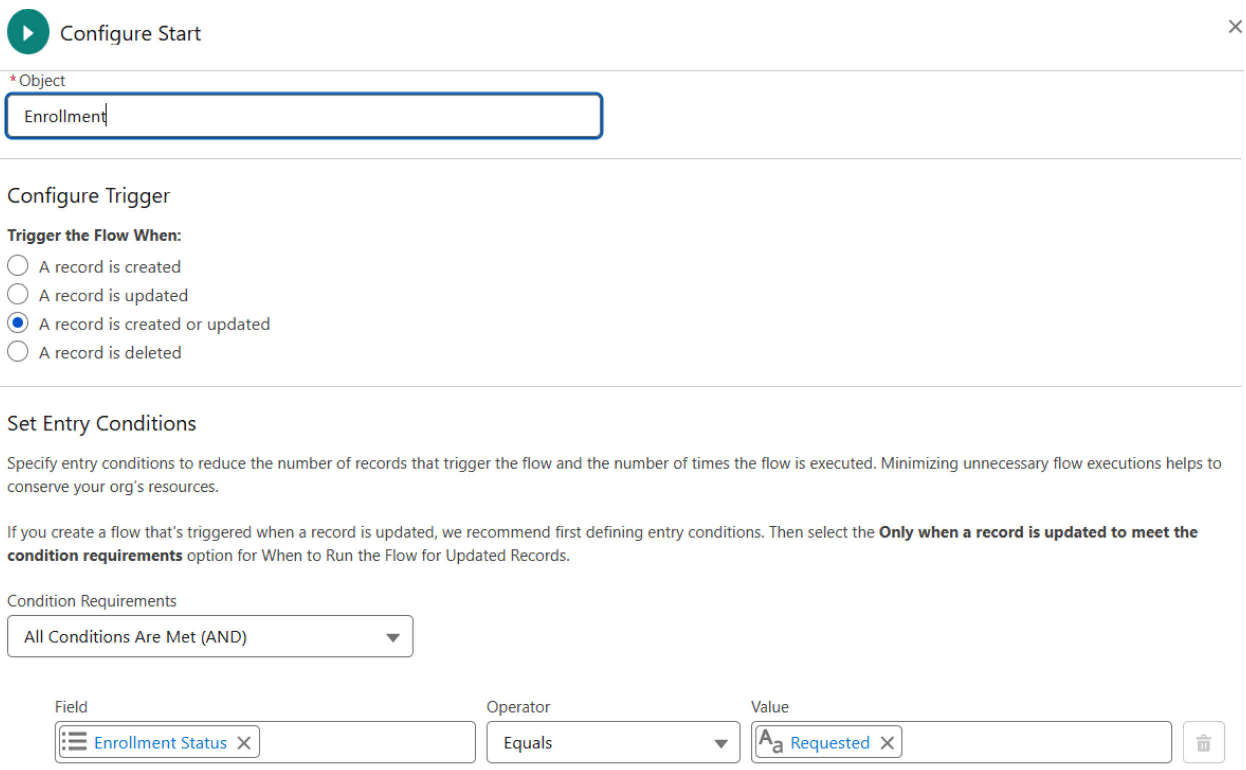


Activity4:Auto-CreateTaskforFollow-Up

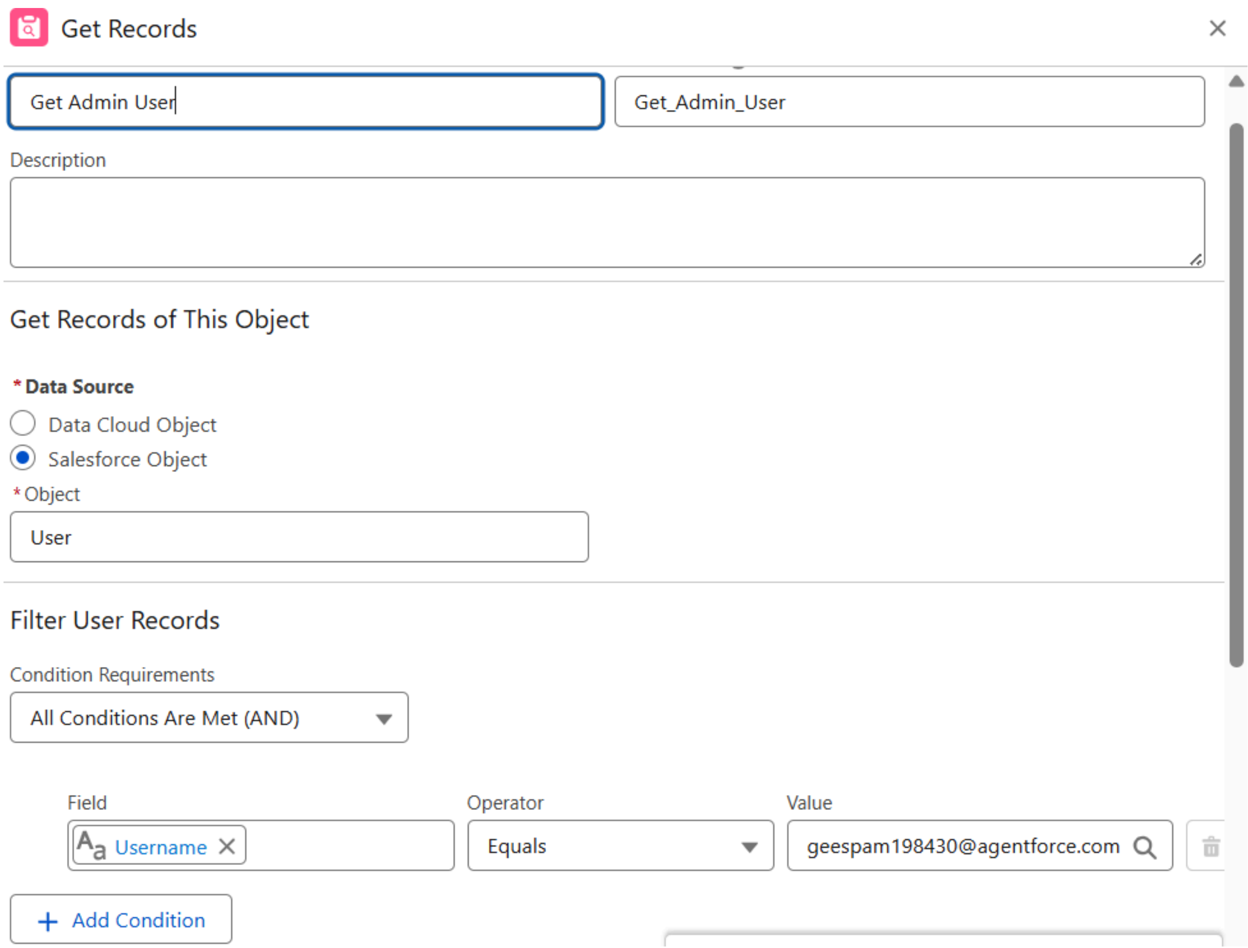
Purpose:
WhenEnrollmentis“Requested”,createafollow-uptaskforAdmin.

Steps:

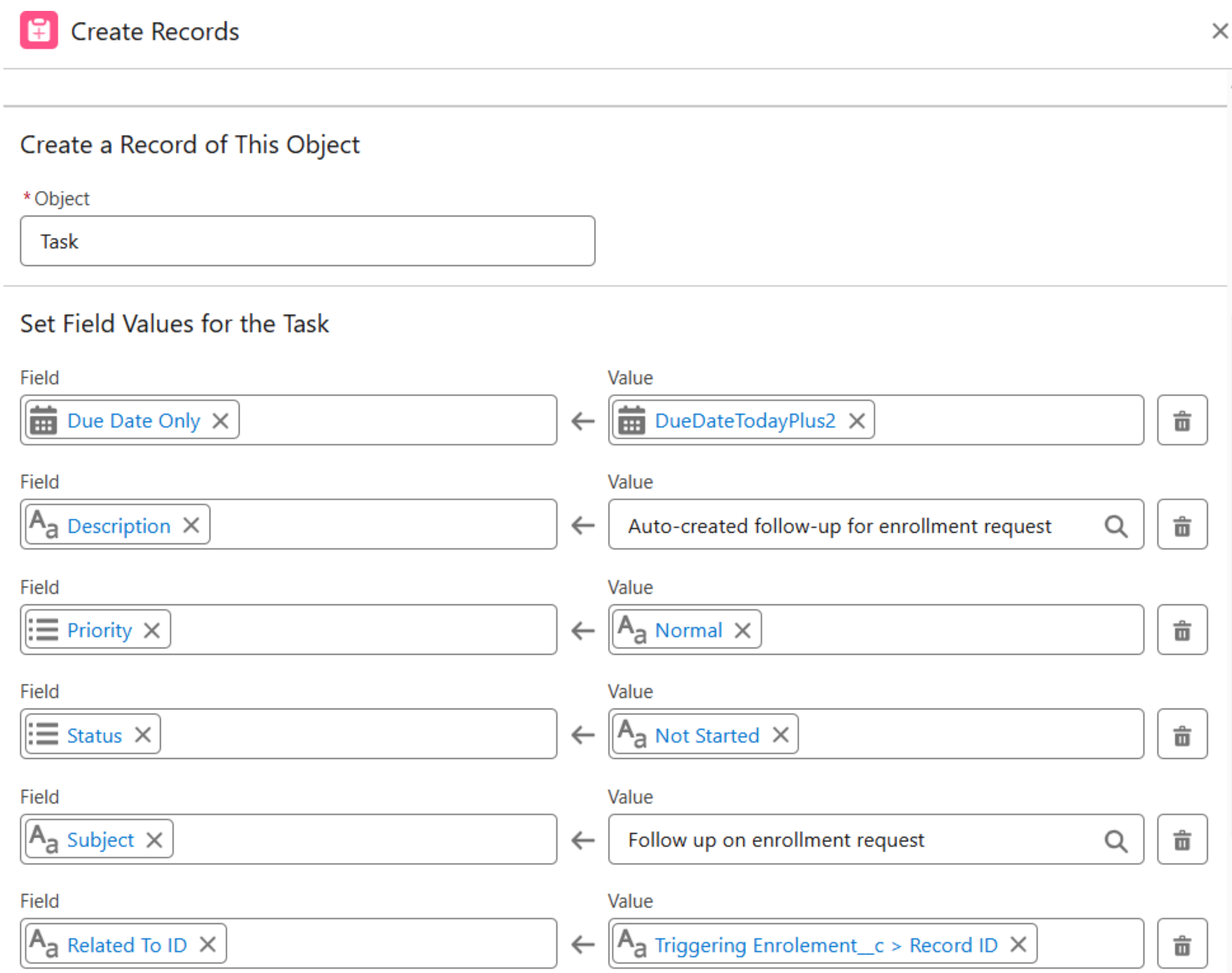
1. CreateRecord-TriggeredFlowonEnrollment__c.
2. Trigger:Recordcreatedorupdated;conditionEnrollment_Status__c ="Requested".



3. AddGetRecordstofetchAdminuser(byUsername/Profile).
4. AddFormula(Date):TODAY()+2forduedate.



5. AddCreateRecordsfor Task:
6. Subject:Followuponenrollmentrequest.
7. OwnerId:Adminuser Id.
8. WhatId:EnrollmentId.
9. ActivityDate:formulaToday+2.

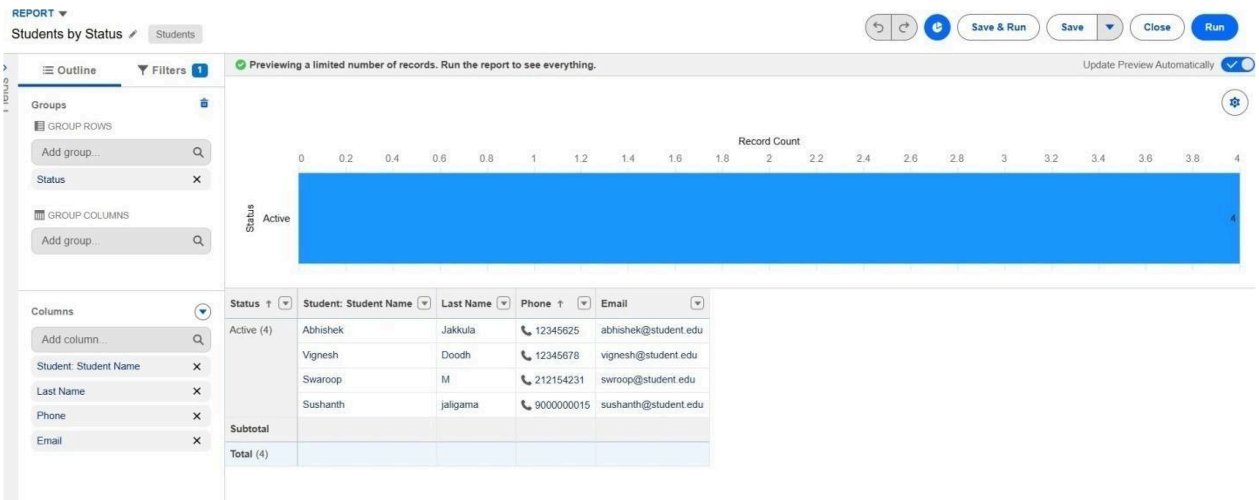


10. SaveasCreate_Followup_Task→Activate.

Milestone11–Reports:

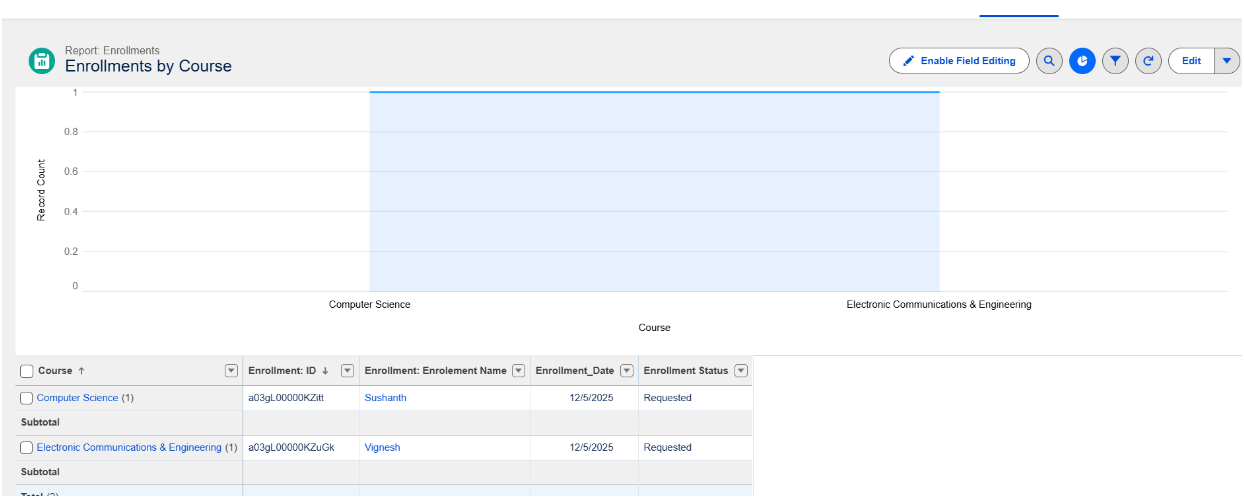
Activity1:Create“StudentsbyStatus”Report

1. Goto**Reports→NewReport**.
2. ReportType:`Students`.
3. Grouprowsby`Status_c`.
4. Addcolumnsasneeded(Name,Email,Phone).
5. Saveas`StudentsbyStatus`.



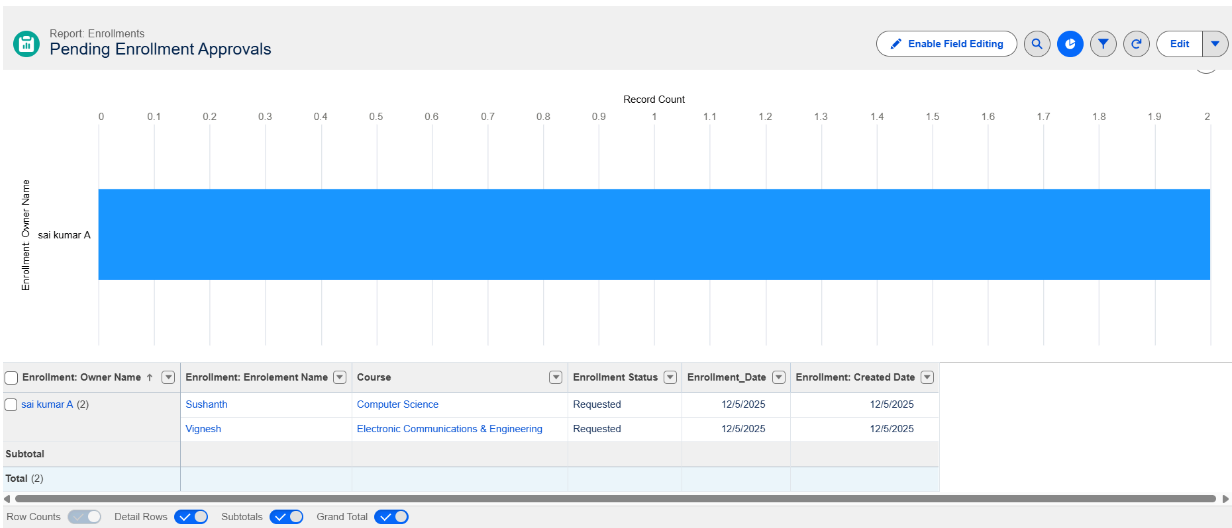
Activity2:Create“EnrollmentsbyCourse”Report

1. NewReport→ReportType:`Enrollment`
`s`. 2.Grouprows by `Course____r.Name`.
3. ShowRecordCountpercourse.
4. Saveas`EnrollmentsbyCourse`



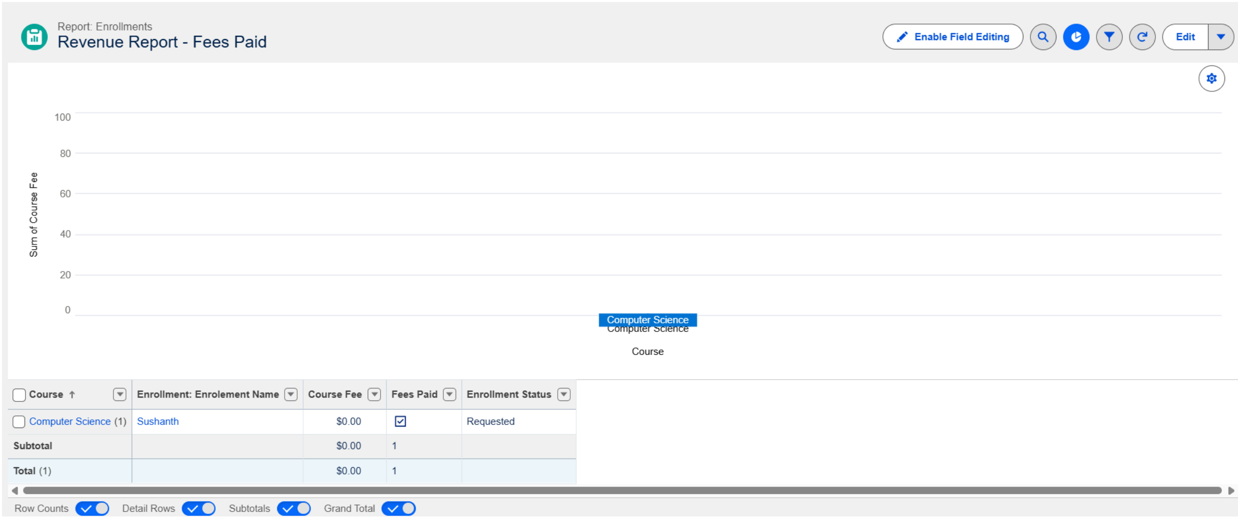
Activity3:Create“PendingEnrollmentApprovals”Report

1. NewReport→Enrollmentsreporttype.
2. Filter:Enrollment_Status__c="Requested".
3. Addcolumns(Student,Course,Owner,CreatedDate).
4. SaveasPendingEnrollmentApprovals.



Activity4:Create“RevenueReport(FeesPaid)”Report

1. NewReport→Enrollmentsreporttype.
2. Filter:Fees_Paid_c=TRUE.
3. GroupbyCourse__r.Name.
4. SummarizeCourse_Fee_corsimilarfeefield.
5. SaveasRevenueReport-FeesPaid.

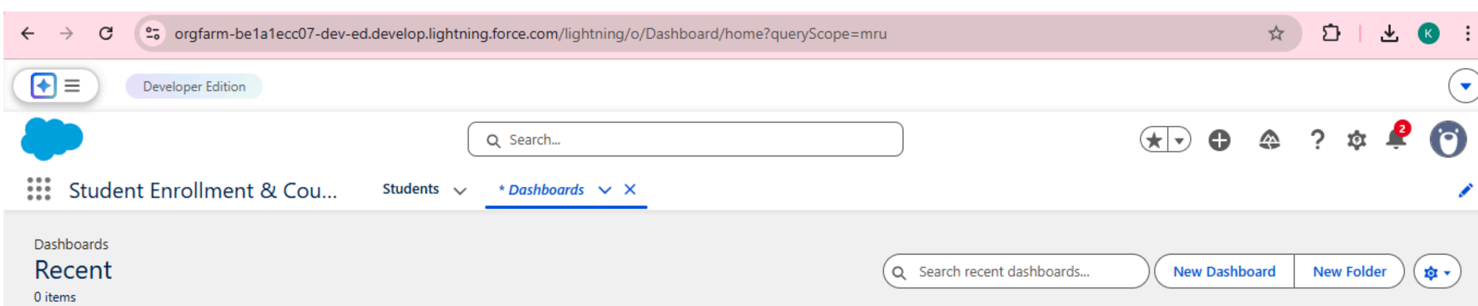


Milestone12–Dashboards:

Activity1:Create“StudentManagemetDnashboard”

Steps:

1. Goto**Dashboards→NewDashboard**.
2. Name:StudentManagementDashboard.



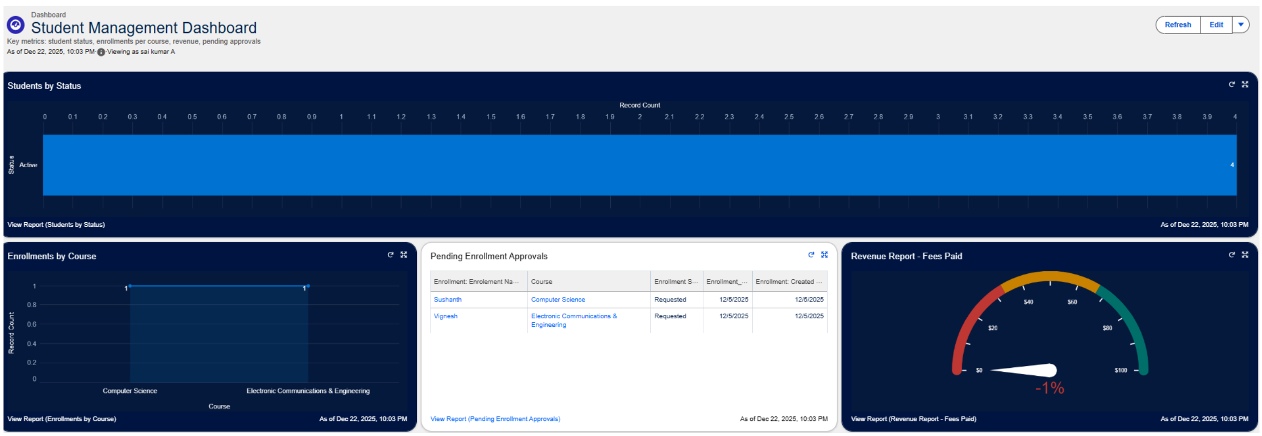
3. Selectfolder→**Create**.
4. SelectnewDashboardfolderandSave.

Addcomponents:

- **DonutChart**→usingStudentsbyStatusreport.
- **BarChart**→usingEnrollmentsbyCoursereport.

- **Gauge**→ usingRevenue Report-FeesPaid(sumof revenue field).
- **Table**→ usingPending EnrollmentApprovalsreport.

4.Arrangecomponentsoncanvas.



Click**Save**→ **Done**.

Milestone13–SecuritySetup

Activity1:ConfigureProfiles

):

1. Goto**Setup**→**Profiles**→**New**(orClone**Profiles Required**:

- **Admin**–Fullaccess.
- **EnrollmentOfficer**–Create/UpdateEnrollments.
- **Instructor**–Read-onlyaccesstoassigned Enrollments.

2. **Steps(exampleforEnrollmentOfficer**fName: Enrollment Officer.
3. In**ObjectSettings**:
   - Enrollment__c:Read,Create,Edit.
   - Student__c / Course__c:Read(andEditif required).
4. Save.

Repeatsimilarlyfor**Instructor**profilewith**Read-Only** on Enrollments

Activity2:CreatePermissionSets

1. Goto**Setup→PermissionSets→New.**
2. CreateCustomObjectAccess(additionalaccessto project objects if needed).
3. CreateDashboardEditor(Create/CustomizeReports& Dashboards permissions).
4. Assigntorelevantusers.

Activity3:ConfigureSharing& OWD

Steps:

1. Goto**Setup→SharingSettings.**
2. Set**Organization-WideDefaults**:

- **Students(Student__c)**:PublicRead/Write.
- **Courses(Course__c)**:PublicRead/Write.
- **Enrollments(Enrollment__c)**:Private.

3. Save.

ForInstructoraccesstoassignedEnrollments, optionally:

- Adda**Userlookup**onEnrollment(InstructorUser).
- Useasimple**Record-TriggeredFlow**toset**OwnerId= Instructor User** so they can see only their own records.

7. FUNCTIONAL&PERFORMANCETESTING

During the testing phase, screenshots were captured from theSalesforceuserinterfaceto verify the proper functioning of all implemented features of the Student Enrollment & Course Management System (SECMS). These include student, course, instructor, and enrollment record creation; validation rule checks for mandatory fields, eligibility, and enrollment constraints; verification of record type behavior for different course categories; flow execution for automated enrollment approvals and seat availability checks; and Apex trigger functionality to ensure automatic confirmation and record updates. Additionally, screenshots of generated reportsanddashboardsweredocumented to validate accurate data visualization, enrollment tracking, andperformancemonitoring. Submit the Screenshots while testing.

8. ADVANTAGES& DISADVANTAGES

Advantages

- Centralizeddata
- Automatedworkflows
- Real-timereporting

Disadvantages

- Salesforcedependency
- Requiresinitialconfigurationeffort

9. Conclusion:

The Salesforce Student Enrollment & Course Management System successfully streamlines the entire student academic lifecycle—from student registration and course creation to enrollment management, instructor assignment, approvals, revenue tracking, and reporting. By leveraging Salesforce's automation tools such as validation rules,flows, approval processes, and dashboards, the system improves data accuracy, operational efficiency, and decision-making. This project demonstrates how Salesforce can transform manual academic processes into a scalable, reliable, and user-friendly digital solution.

10. FUTURESCOPE

- Paymentgatewayintegration
- Studentself-serviceportal
- Analytics-driveninsights

- Mobileaccesssupport

11. APPENDIX

- SourceCode:SalesforceConfiguration
- Dataset:SalesforceObjects
- GitHub/Demo:SalesforceDeveloperOrg

Thank You