

Student CRM

_____ The detailed documentation for the Student CRM Salesforce Project.



Student CRM Salesforce Project Documentation



Project Overview

Project Name: Student CRM – Salesforce App

Platform: Salesforce Developer Org

Objective: To build a basic but functional CRM system to manage Students, Courses, and their Enrolments, using custom objects, relationships, flows, validation rules, and reports.



Core Components

1. Custom Objects

- **Student__c**
 - Fields: Name, Email, Phone, Address
- **Course__c**
 - Fields: Name, Duration, Description
- **Enrollment__c**
 - Junction object between Student and Course
 - Fields:
 - Lookup(Student__c)
 - Lookup(Course__c)
 - Enrollment Date
 - Status

- **Student_Course_Key__c** (Formula field: Student__c & '-' & Course__c)
Used to prevent duplicates
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2. Relationships

- **Enrollment__c** has:
 - Lookup(Student__c)
 - Lookup(Course__c)
 - One student can enroll in multiple courses
 - One course can have many students
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3. Screen Flow: Student Enrollment

Purpose:

To allow users to enroll students into a course via a guided process.

Steps:

1. **Screen 1** – Dropdown to select Student (Student__c)
2. **Screen 2** – Dropdown to select Course (Course__c)
3. **Create Records Element** – Creates Enrollment__c record
4. **Decision Element** (optional) – To check for null values or duplicates
5. **Confirmation Screen**

Special Handling:

- If Student or Course dropdowns return null:
 - Ensured proper field-level security and sharing settings
 - Checked picklist values and query limits
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Duplicate Prevention Logic

Matching Rule:

- Field used: Student_Course_Key__c (combination of Student & Course)
- Type: Exact match

Duplicate Rule:

- Fires on Enrollment__c creation
 - Prevents duplicates and shows an error message:
"This student is already enrolled in this course."
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Validation Rules

1. Prevent Missing Fields:

- Checks if Student or Course fields are left blank in Enrollment__c :
ISBLANK(Student__c) || ISBLANK(Course__c)

2. Enrollment Date Not in Past:

Enrollment_Date__c < TODAY()

Reports

Created Report: Course-wise Enrollment Report

- Report Type: Custom (Enrollment with Student & Course)
 - Filters:
 - Status = "Active"
 - Grouped by: Course Name
 - Shows count of students per course
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UI and App Setup

- Created **Student CRM App** in App Manager
 - Customized Lightning Record Pages:
 - Tabs: Students, Courses, Enrollments
 - Related Lists: Added Enrollment section to both Student & Course pages
 - Added Flow button on Student and Course record pages (optional)
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⚡ Tools & Features Used

Feature	Used In
Custom Objects	Student, Course, Enrollment
Lookup Relationships	Enrollment to Student/Course
Formula Field	Student_Course_Key__c
Screen Flow	Enrollment process
Validation Rules	Mandatory fields, future dates
Duplicate Rules	Prevent duplicate enrollments
Reports	Course-wise enrollment
Lightning UI	App, Tabs, Record Pages

Conclusion

This project demonstrates core Salesforce skills using:

- Declarative tools (Flow, Validation Rules, Reports)
- Data model design with custom objects
- Functional CRM logic in a clean UI

It's beginner-friendly but scalable. Ideal for resumes, portfolios, or showcasing practical Salesforce knowledge.

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