

EduConnect : Smart Learning and Enrollment CRM Portal (Phase 6)

Goal:

The goal of this project is to build a Salesforce-based Student Enrollment and Learning Portal that automates the complete admission process. It will streamline student inquiries, course enrollments, and fee tracking while reducing manual effort and delays. Automated notifications and reminders will improve communication with students and faculty. Overall, the system will enhance efficiency, accuracy, and reporting, ensuring a smoother enrollment experience for educational institutes.

Problem Statement:

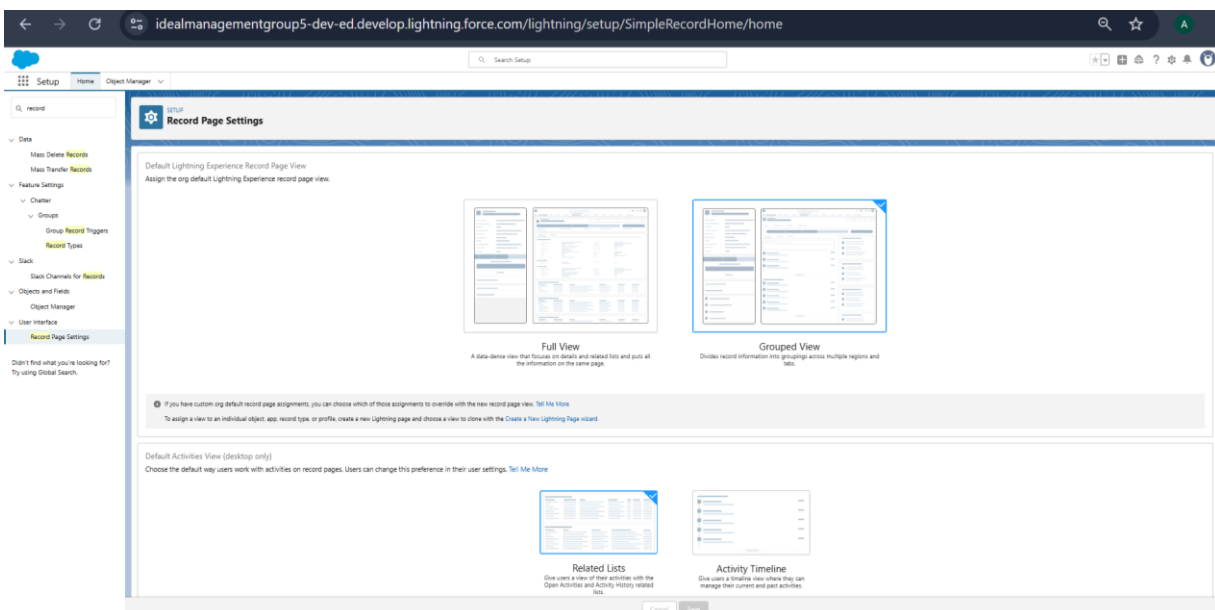
Educational institutes face challenges in managing student inquiries, admissions, and course enrollments due to manual processes. This causes delays, missed follow-ups, and inefficiency. A Salesforce-based portal will automate lead capture, admissions, fee tracking, and notifications, ensuring faster enrollment and better reporting.

Phase 6: User Interface Development

Phase 6 focuses on **User Interface (UI) Development** to make the Smart Student Enrollment and Learning Portal more user-friendly and interactive. In this phase, Lightning Record Pages, Lightning App Builder and dashboards were designed to provide an engaging and efficient experience for students, teachers, and administrators.

Lightning Record Pages

- Customized **Record Pages** for Students, Courses, and Batches.
- Added **related lists** for quick navigation to enrollments, fees, and batches.
- Improved record visibility with logically grouped sections.

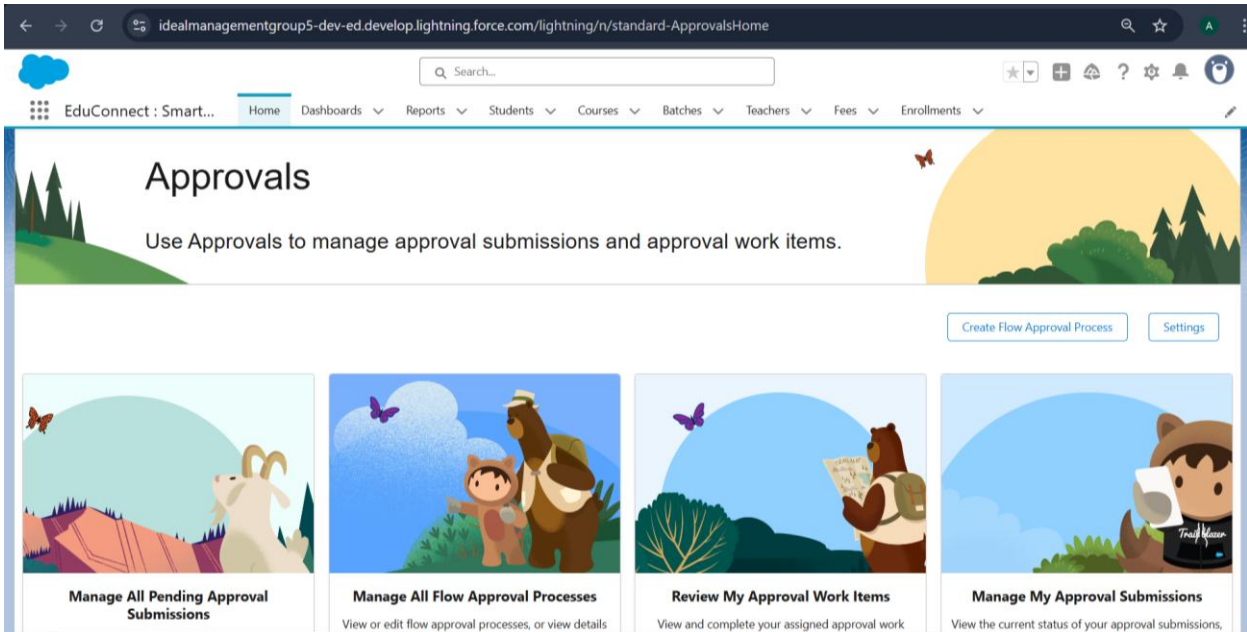


Lightning App Builder

- Used **Lightning App Builder** to design personalized record pages.
- Created **tabs and sections** to display important details like course info, fee tracking, and student data.
- Enhanced accessibility by making frequently used features more prominent.

Home Page Layouts

- Designed personalized home pages for different profiles using Lightning App Builder.
- Included key metrics, reports, dashboards, and quick actions for better efficiency.



Tabs

- Configured object and custom tabs for easy access to relevant data.
- Organized tabs logically to align with user roles and workflows.

The screenshot shows the Lightning App Builder interface for the 'Students' app. The page displays a list of students with the following columns: Student Name, Age, Batch, Address, Contact Number, Course, Email, Date of Birth, Status, and Student ID. The list is sorted by Student Name and includes a search bar and various action buttons (New, Import, Change Owner, Assign Label).

	Student Name	Age	Batch	Address	Contact Number	Course	Email	Date of Birth	Status	Student ID
1	Adarsh Dixit	25	Web Dev	Jabalpur	2345678190	Web Dev	adarsh@gmail.com	11/1/2000	Applied	S006
2	Amaresh Goyal	22	Python	Indore	9161452786	Python	amaresh@gmail.com	1/11/2002	Inactive	S012
3	Amarjeet	23	Web Dev	Jabalpur	1234567899	AWS	amarjeet@gmail.com	25/9/2002	Applied	S020
4	Amoli Khanna	23	Python	Bhopal	2345671891	Python	amoli@gmail.com	1/8/2002	Active	S007
5	Arya	20	Python for Data Science	Jabalpur	1234567890	Python for Data Science	arya@gmail.com	24/11/2004	Applied	S001
6	Bhavesh Dayal	21	Python	Jabalpur	7824367181	Python	bhavesh@gmail.com	1/11/2003	Inactive	S010
7	Bhavna Mittal	22	Python	Pune	2517839265	Python	bhavna@gmail.com	1/11/2002	Active	S009
8	Devika Namdeo	23	Python	Bangalore	4516782344	Python	devika@gmail.com	1/8/2002	Applied	S013
9	Jaikar Mehra	25	Python	Pune	6281272627	Python	jaikar@gmail.com	8/9/2000	Inactive	S017
10	Karuna Sinha	19	Python	Pune	6278176345	Python	karuna@gmail.com	1/11/2005	Active	S011
11	New Student				9576543200				Inactive	STU2002
12	New Student2				9576540200				Inactive	STU2001
13	New Student3				9576504200				Active	STU2003
14	Priya Singh	18	Web Dev	Indore	2467892567	Web Dev	priya@gmail.com	22/10/2006	Active	S005
15	Rahul Mehra	18	Web Dev	Pune	3214156716	Web Dev	rahul@gmail.com	1/9/2007	Active	S014
16	Rakesh Arora	27	Python	Jabalpur	6826749015	Python	rakesh@gmail.com	5/11/1997	Applied	S008
17	Rohan Sharma	22	Python	Jabalpur	9825678910	Python	rohan@gmail.com	1/11/2002	Applied	S004

idealmanagementgroup5-dev-ed.develop.lightning.force.com/lightning/o/Course__c/list?filterName=All

EduConnect : Smart... Home Dashboards ▾ Reports ▾ Students ▾ Courses ▾ Batches ▾ Teachers ▾ Fees ▾ Enrollments ▾

Courses
All ▾

6 items • Sorted by Course Name • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Course Name ↑	Cid	Course Fees	Batch	Duration in ...	Fees	Teacher
1	<input type="checkbox"/> Android Development	C005	20,000	Android Developmet	120	Python for Data Science	Arya
2	<input type="checkbox"/> AWS	C006	12,000	Web Dev	120	Web Development	Aditya
3	<input type="checkbox"/> Java Programming	C003	10,000	Java Programming	90	Java Programming	Arya
4	<input type="checkbox"/> Python	C001	10,000	Python	60	Python	Aditya
5	<input type="checkbox"/> Python for Data Science	C004	15,000	Python	120	Python for Data Science	Aditya
6	<input type="checkbox"/> Web Dev	C002	10,000	Web Dev	60	Web Development	Aadya

idealmanagementgroup5-dev-ed.develop.lightning.force.com/lightning/o/Batch__c/list?filterName=All

EduConnect : Smart... Home Dashboards ▾ Reports ▾ Students ▾ Courses ▾ Batches ▾ Teachers ▾ Fees ▾ Enrollments ▾

Batches
All ▾

5 items • Sorted by Batch Name • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Batch Name ↑	Batch id	Cid	Course	End date	Start date	Student	Teacher
1	<input type="checkbox"/> Android Developmet	B005	C005	Android Development				Arya
2	<input type="checkbox"/> Java Programming	B003	C003	Java Programming	24/12/2025	24/9/2025		Arya
3	<input type="checkbox"/> Python	P-001	C001	Python				Aadya
4	<input type="checkbox"/> Python for Data Science	B004	C004	Python for Data Science				Aditya
5	<input type="checkbox"/> Web Dev	B002	C002	Web Dev		24/9/2025		Rahul Sharma

idealmanagementgroup5-dev-ed.develop.lightning.force.com/lightning/o/Teacher_c/list?filterName=All

EduConnect : Smart... Home Dashboards Reports Students Courses Batches Teachers Fees Enrollments

Teachers

All

5 items • Sorted by Faculty Name • Updated a few seconds ago

New Import Change Owner Printable View Assign Label

Search this list...

	Faculty Name ↑	Department	Designation	Faculty Emailid	Faculty_id	
1	<input type="checkbox"/> Aadya	Mathematics	Professor	aadya@gmail.com	F005	
2	<input type="checkbox"/> Aditya	Computer science	Professor	aditya@gmail.com	F001	
3	<input type="checkbox"/> Arya	Computer science	Professor	arya@gmail.com	F002	
4	<input type="checkbox"/> Rahul Sharma	English	Professor	rahul@gmail.com	F003	
5	<input type="checkbox"/> Renu Vishwakarma	Hindi	HOD	renu@gmail.com	F004	

idealmanagementgroup5-dev-ed.develop.lightning.force.com/lightning/o/Fees_c/list?filterName=All

EduConnect : Smart... Home Dashboards Reports Students Courses Batches Teachers Fees Enrollments

Fees

All

9 items • Sorted by Course Name • Updated a few seconds ago

New Import Change Owner Printable View Assign Label

Search this list...

	Course Name ↑	Amount paid	Amount Remal...	Course Fee	Date of p...	Due Date	Status	Student	Student Ema...	Student id	Record ID
1	<input type="checkbox"/> AWS	900	₹11,100.00	12,000	25/9/2025		Pending	New Student2		STU2001	a04Qy00000ArhSVIAZ
2	<input type="checkbox"/> AWS	12,000	₹0.00	12,000	25/9/2025		Paid	New Student3		STU2003	a04Qy00000ArhBNIAZ
3	<input type="checkbox"/> Java Programming	2,000	₹8,000.00	10,000	24/9/2025	30/9/2025	Pending	Rahul Mehra	rahul@gmail.co...	S004	a04Qy00000ApvdfIAF
4	<input type="checkbox"/> Mathematics	1,000	₹0.00	1,000			Paid	Test Student	teststudent@g...	STU1003	a04Qy00000AlrsmIAB
5	<input type="checkbox"/> Mathematics	1,000	₹0.00	1,000	25/9/2025		Paid	New Student		STU2002	a04Qy00000ArpgAJAR
6	<input type="checkbox"/> Python	5,000	₹10,000.00	15,000	12/9/2025		Pending	Test Student	test@example.c...	S001	a04Qy00000AJ3HYIA1
7	<input type="checkbox"/> Python	5,000	₹5,000.00	10,000	18/9/2025	17/9/2025	Pending	Arya	arya@gmail.com	S001	a04Qy00000AZ9XMI1
8	<input type="checkbox"/> Python for Data Science	5,000	₹15,000.00	20,000		30/9/2025	Pending	Arya	arya@gmail.com	S005	a04Qy00000ApcQVIAZ
9	<input type="checkbox"/> Web Development	12,000	₹3,000.00	15,000	13/9/2025		Pending	Rahul Mehra	rahul@gmail.co...	S001	a04Qy00000AJGmXIAZ

idealmanagementgroup5-dev-ed.develop.lightning.force.com/lightning/o/Enrollment_c/list?filterName=All

EduConnect : Smart... Home Dashboards Reports Students Courses Batches Teachers Fees Enrollments

Enrollments

All

5 items • Sorted by Enrollment Name • Updated a few seconds ago

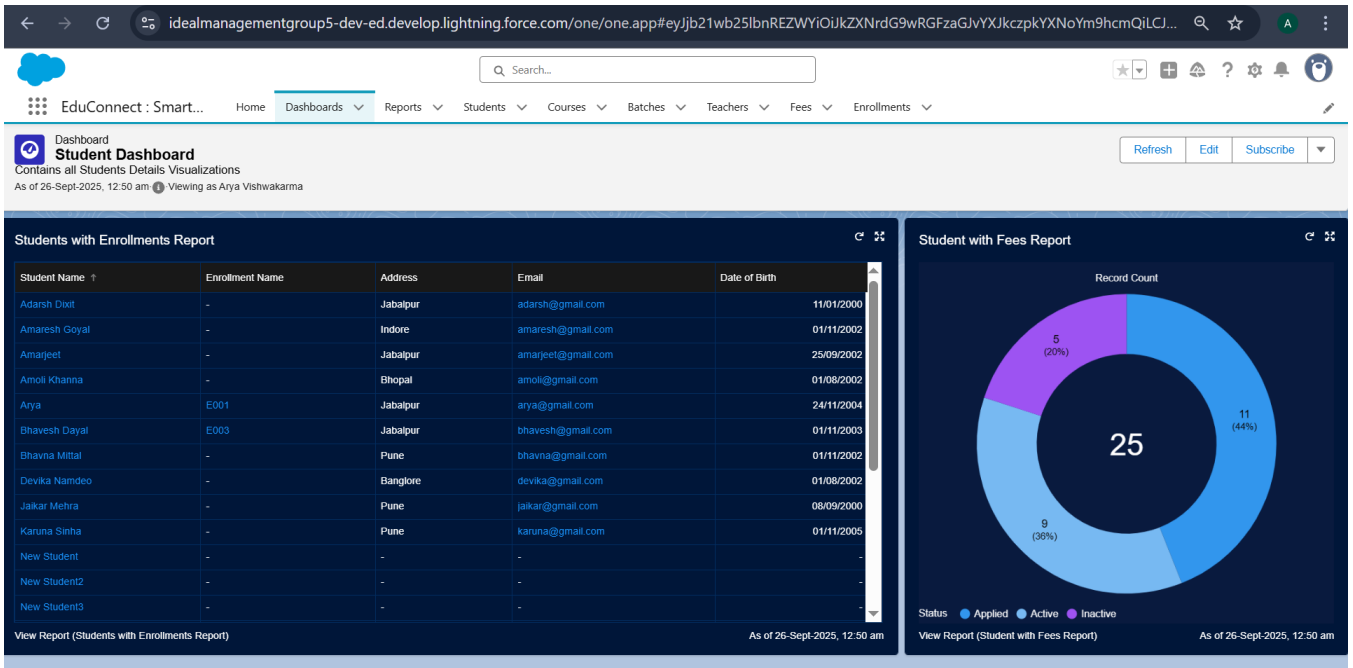
New Import Printable View Assign Label

Search this list...

	Enrollment Name ↑	Batch	Enrollment Date	Status	Student
1	<input type="checkbox"/> E001	Python	20/9/2025	Approved	Arya
2	<input type="checkbox"/> E002	Android Developmet	24/9/2025	Approved	Rahul Mehra
3	<input type="checkbox"/> E003	Java Programming	22/9/2025	Approved	Bhavesb Dayal
4	<input type="checkbox"/> E004	Web Dev	23/9/2025	Draft	Test Student
5	<input type="checkbox"/> E005	Python for Data Science	20/9/2025	Approved	Test Student 2

Student Dashboard

- Developed a **Student Dashboard** with quick links for admissions, course details, and fee status.
- Added **charts and visual indicators** to represent enrollment progress and fee payment history.
- Provided a **centralized view** for students to track their academic journey.



Conclusion

Phase 6 successfully improved the **user experience** of the CRM portal. By customizing record pages and building a student dashboard, the portal became more **interactive, responsive, and user-friendly**. This ensures students, faculty, and administrators can navigate and manage records efficiently.