EduConnect : Smart Learning and Enrollment CRM Portal (Phase 4)

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.

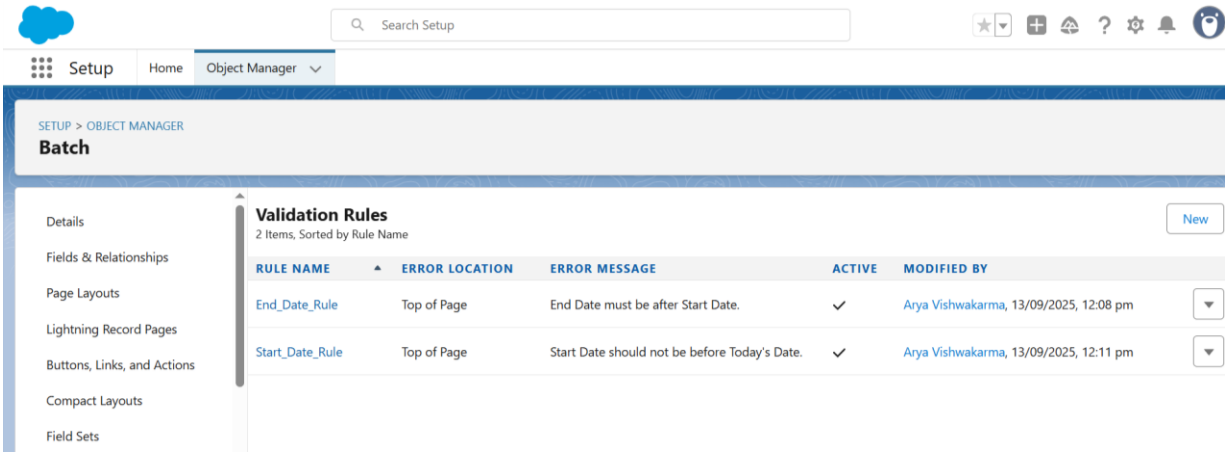
Phase 4: Process Automation (Admin)

Phase 4 focuses on Process Automation **within Salesforce. In this phase, different automation tools such as Validation Rules, Workflow Rules, Approval Processes, Email Alerts, and Field Updates were implemented to streamline the** admission and enrollment process **for the Smart Student Enrollment and Learning Portal.**

Validation Rules

Validation rules were created to ensure data accuracy and integrity:

- Prevented negative values in the **Course Fees** field.
- Enforced correct format for **Email IDs** of students and teachers.
- Ensured **Batch Start Date** is always earlier than **End Date**.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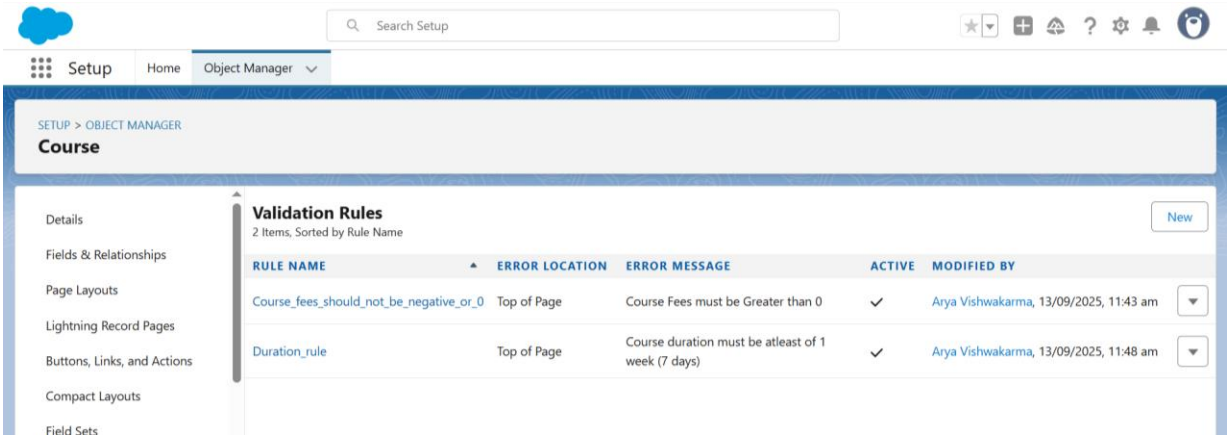
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Batch
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Validation Rules
2 Items, Sorted by Rule Name
New
RULE NAME
ERROR LOCATION
ERROR MESSAGE
ACTIVE
MODIFIED BY
End_Date_Rule
Top of Page
End Date must be after Start Date.
Arya Vishwakarma, 13/09/2025, 12:08 pm
Start_Date_Rule
Top of Page
Start Date should not be before Today's Date.
Arya Vishwakarma, 13/09/2025, 12:11 pm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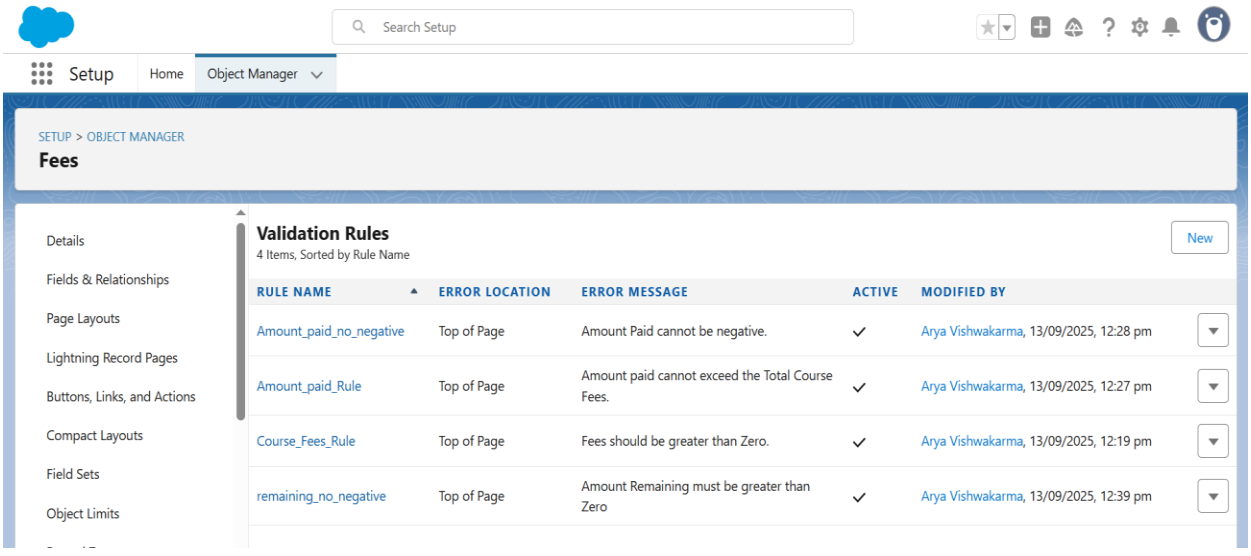
SETUP > OBJECT MANAGER
Course
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Validation Rules
2 Items, Sorted by Rule Name
New
RULE NAME
ERROR LOCATION
ERROR MESSAGE
ACTIVE
MODIFIED BY
Course_fees_should_not_be_negative_or_0
Top of Page
Course Fees must be Greater than 0
Arya Vishwakarma, 13/09/2025, 11:43 am
Duration_rule
Top of Page
Course duration must be atleast of 1 week (7 days)
Arya Vishwakarma, 13/09/2025, 11:48 am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SETUP > OBJECT MANAGER
Fees
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Validation Rules
4 Items, Sorted by Rule Name
New
RULE NAME
ERROR LOCATION
ERROR MESSAGE
ACTIVE
MODIFIED BY
Amount_paid_no_negative
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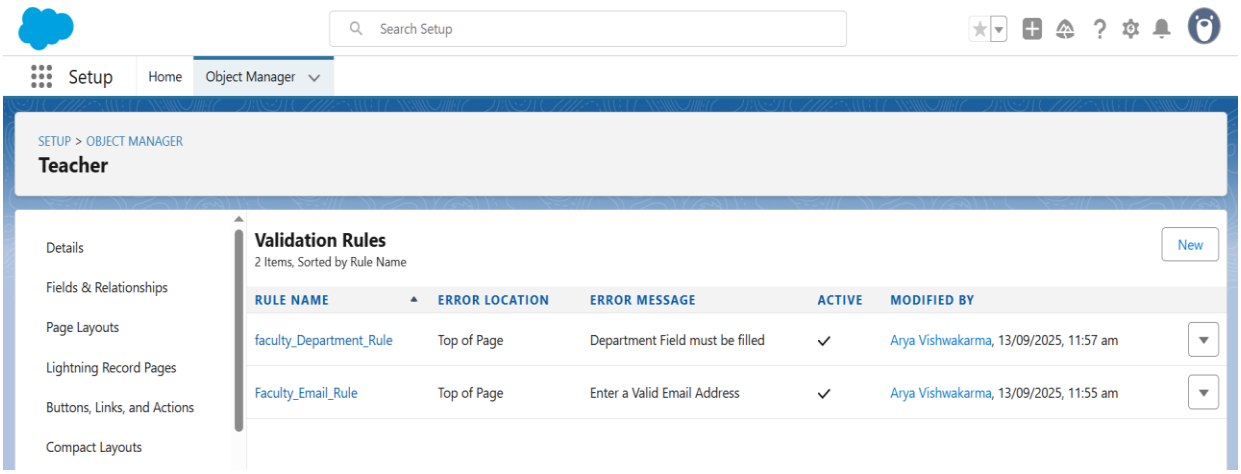
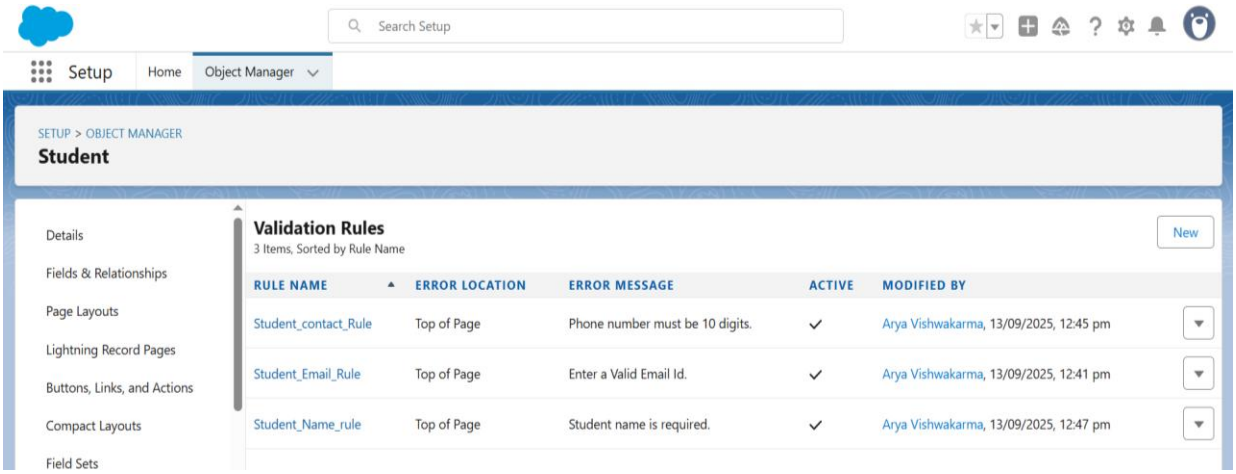
Amount Paid cannot be negative.
Arya Vishwakarma, 13/09/2025, 12:28 pm
Amount_paid_Rule
Top of Page
Amount paid cannot exceed the Total Course Fees.
Arya Vishwakarma, 13/09/2025, 12:27 pm
Course_Fees_Rule
Top of Page
Fees should be greater than Zero.
Arya Vishwakarma, 13/09/2025, 12:19 pm
remaining_no_negative
Top of Page
Amount Remaining must be greater than Zero
Arya Vishwakarma, 13/09/2025, 12:39 pm

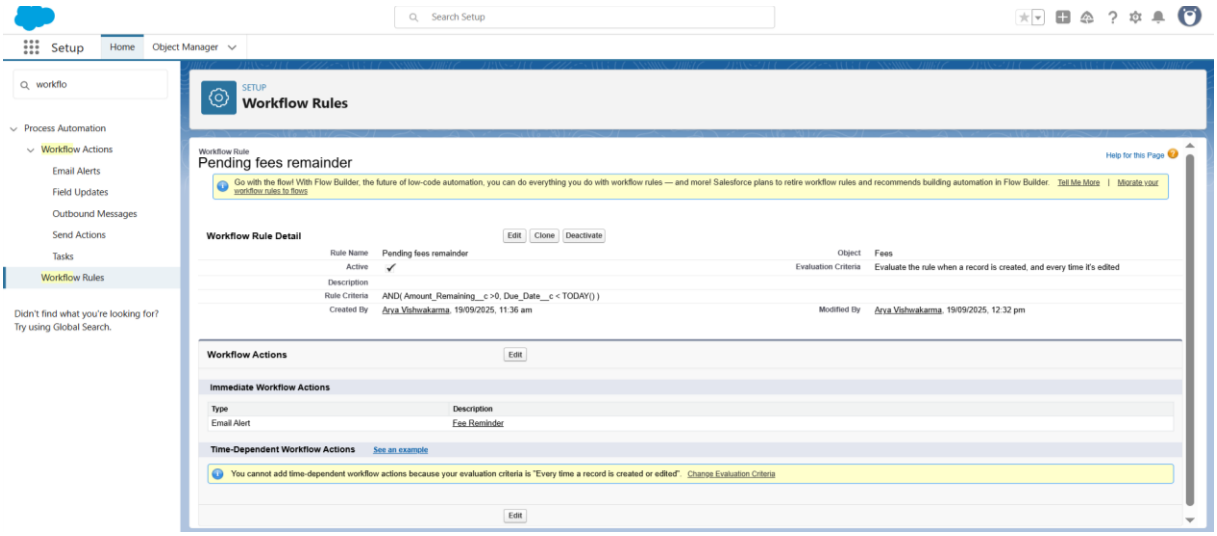


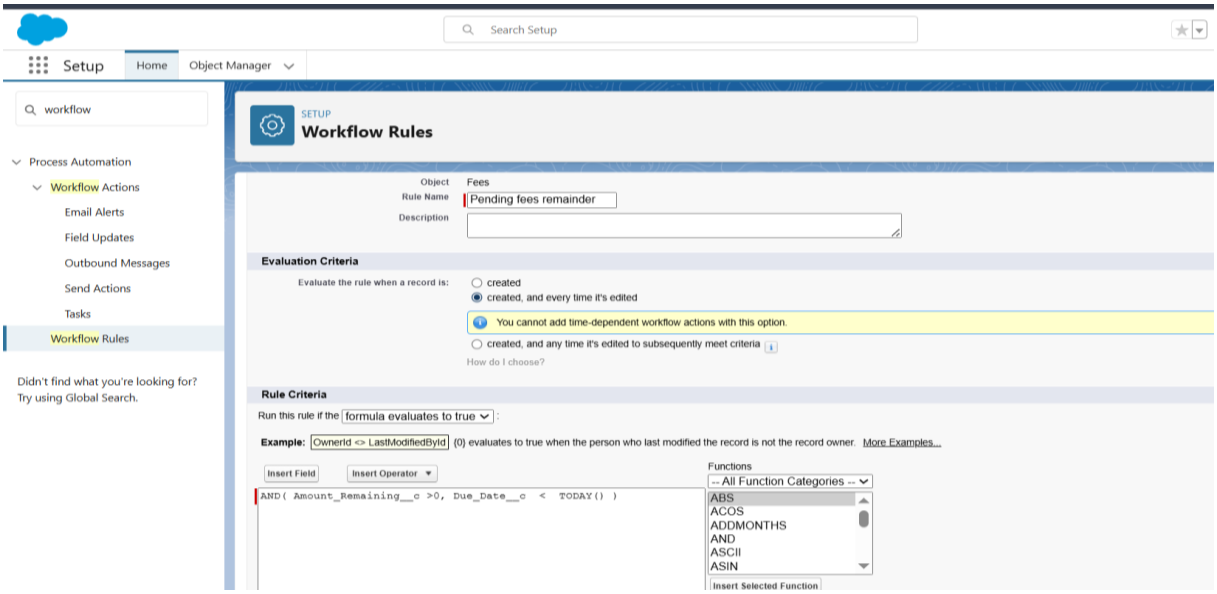


Workflow Rules

Workflow rules were set up to automate repetitive tasks:

- Triggered automatic **email alerts** when a student's admission was confirmed.
- Sent **fee payment reminders** before due dates.
- Updated specific fields (such as status) based on admission or enrollment actions.

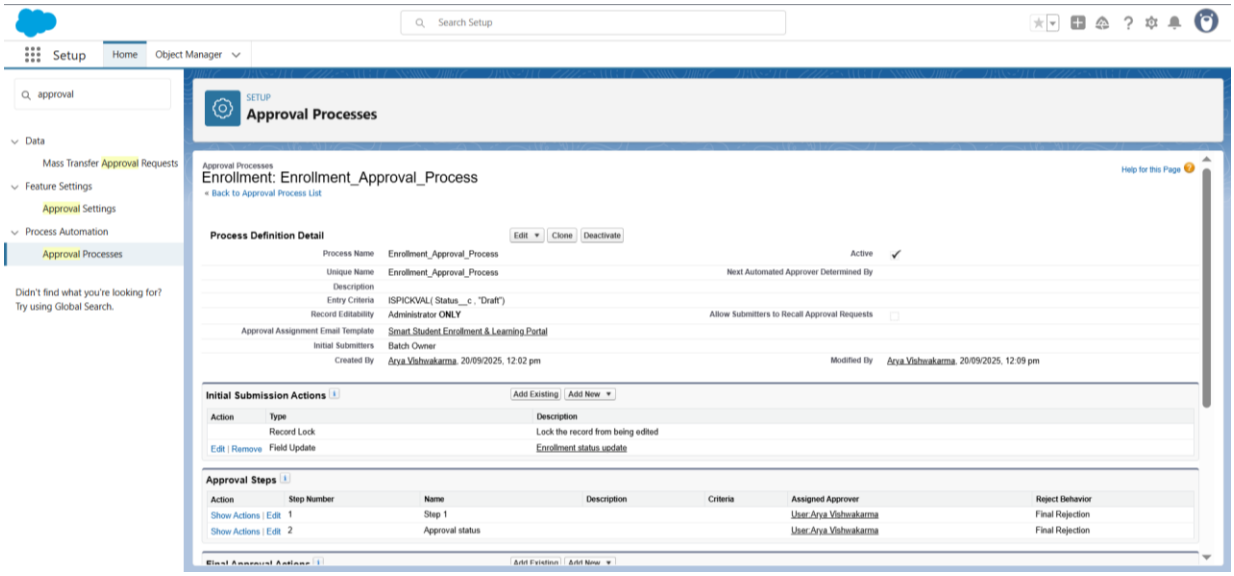


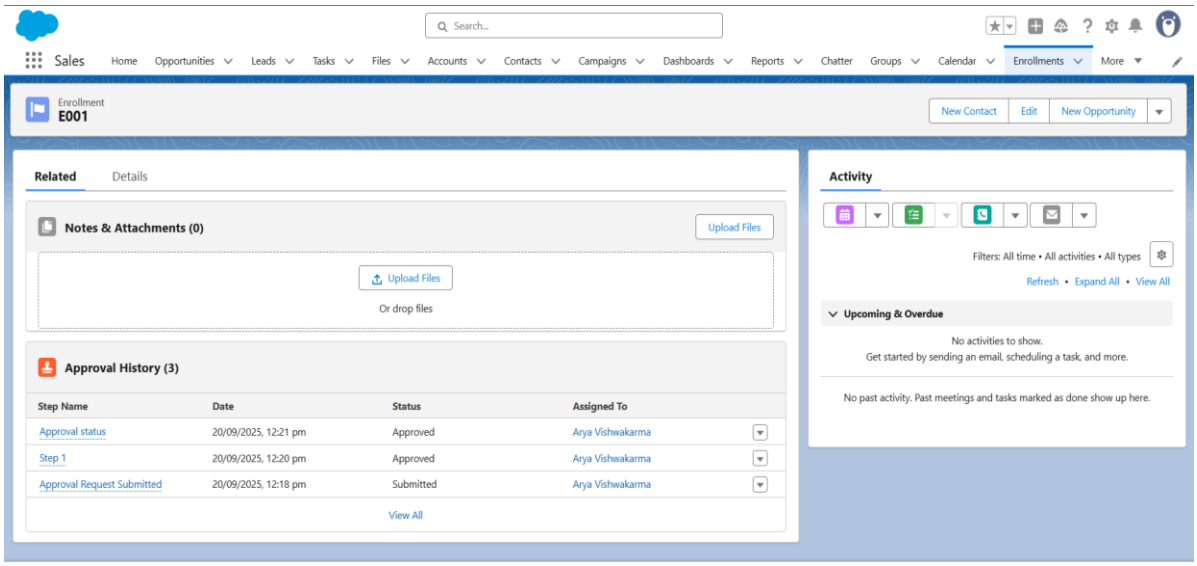


Approval Process

An **Approval Process** was created for scholarship-based admissions:

- Student applications requesting scholarships were routed for approval.
- Only after approval, the scholarship was applied to the student's fee record.
- This ensured proper authorization and transparency.

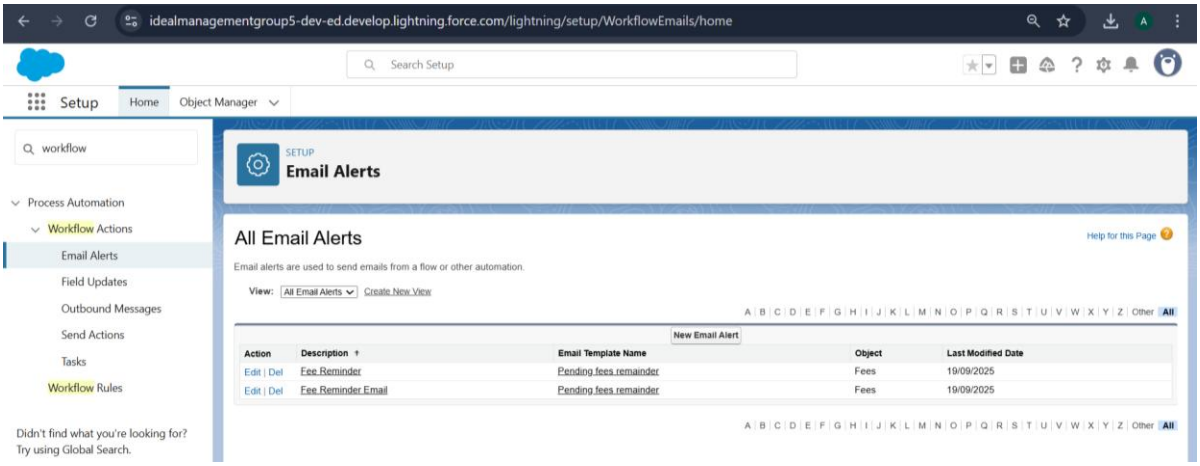


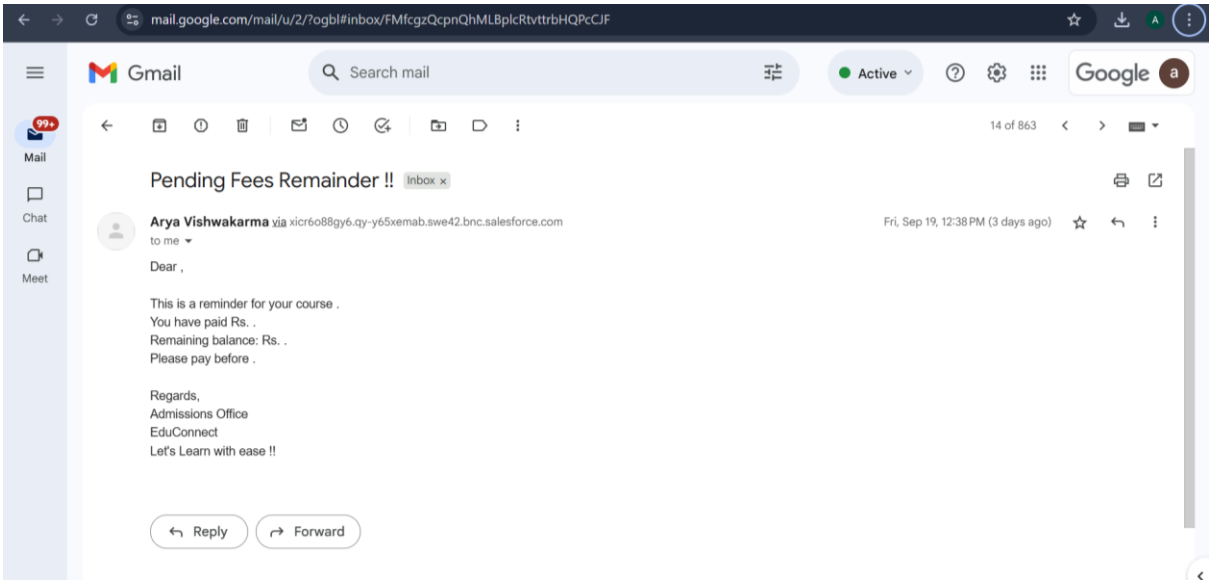


Email Alerts

Email alerts were used to improve communication between students, faculty, and administrators:

- Admission confirmation emails were sent automatically after successful enrollment.
- Faculty members received notifications when students enrolled in their courses.
- Fee payment reminder emails were triggered before the due date.

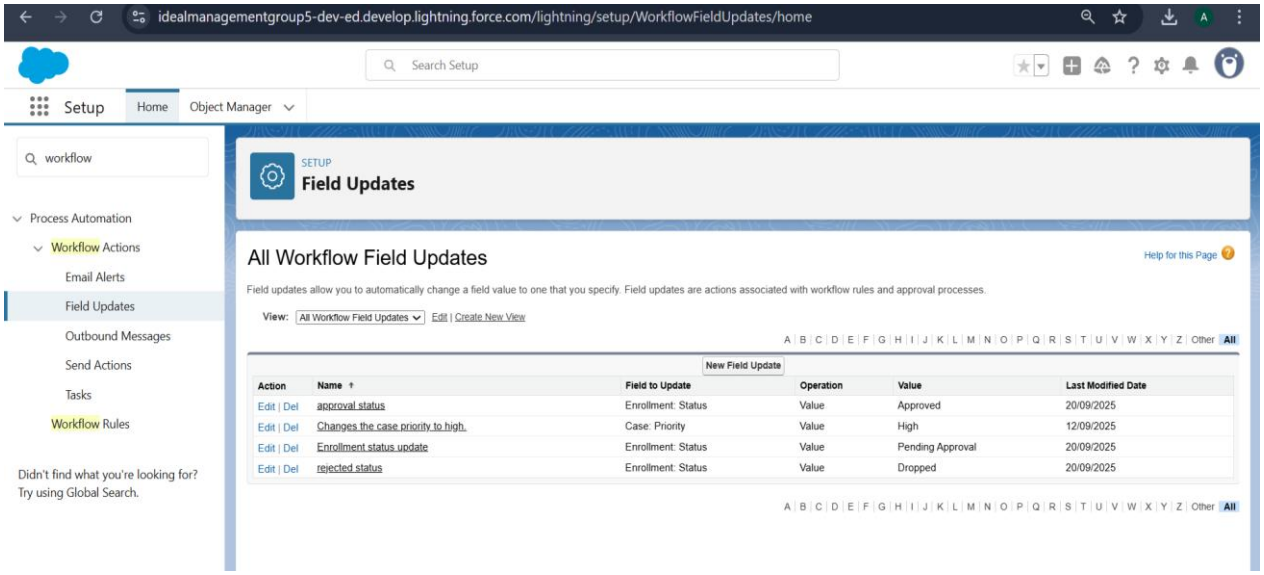




Field Updates

Field updates ensured records remained accurate and up-to-date:

- Automatically updated **Enrollment Status** to “Enrolled” after fee confirmation.
- Updated **Payment Status** fields when students made partial or full payments.
- Adjusted **Remaining Fee Amount** field dynamically during fee transactions.



Conclusion

Phase 4 successfully automated the admission and enrollment process. With validation rules ensuring data accuracy, workflow rules reducing manual effort, approval processes streamlining scholarship applications, email alerts improving communication, and field updates maintaining accurate records, this phase enhanced **efficiency, accuracy, and reliability** of the CRM portal.