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.
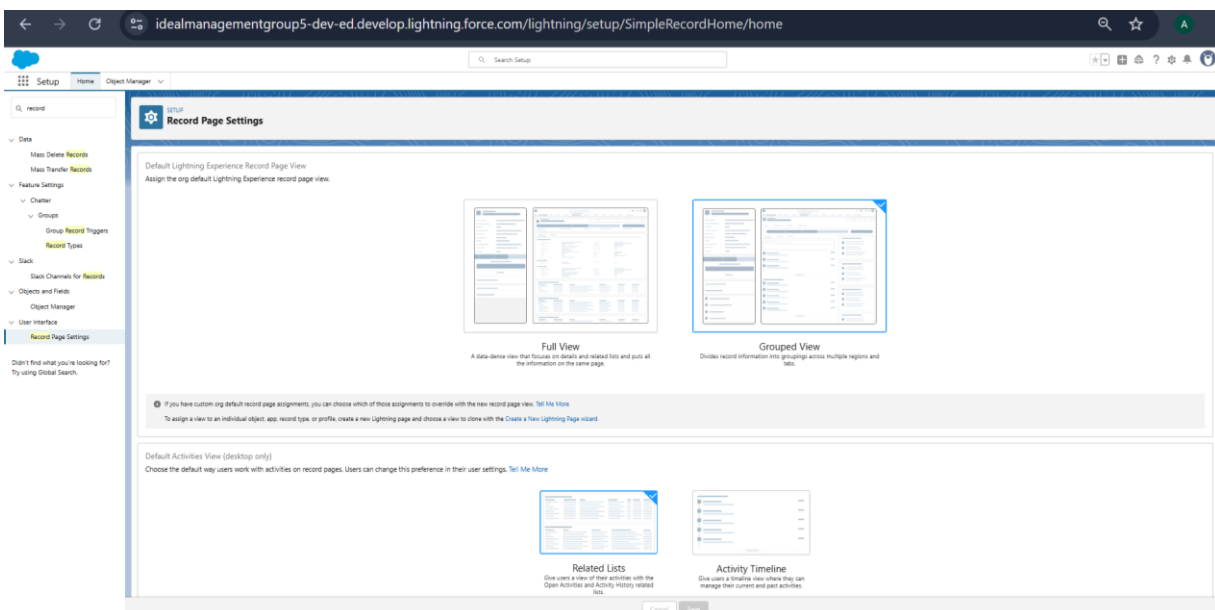
Lightning App Builder

- 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.
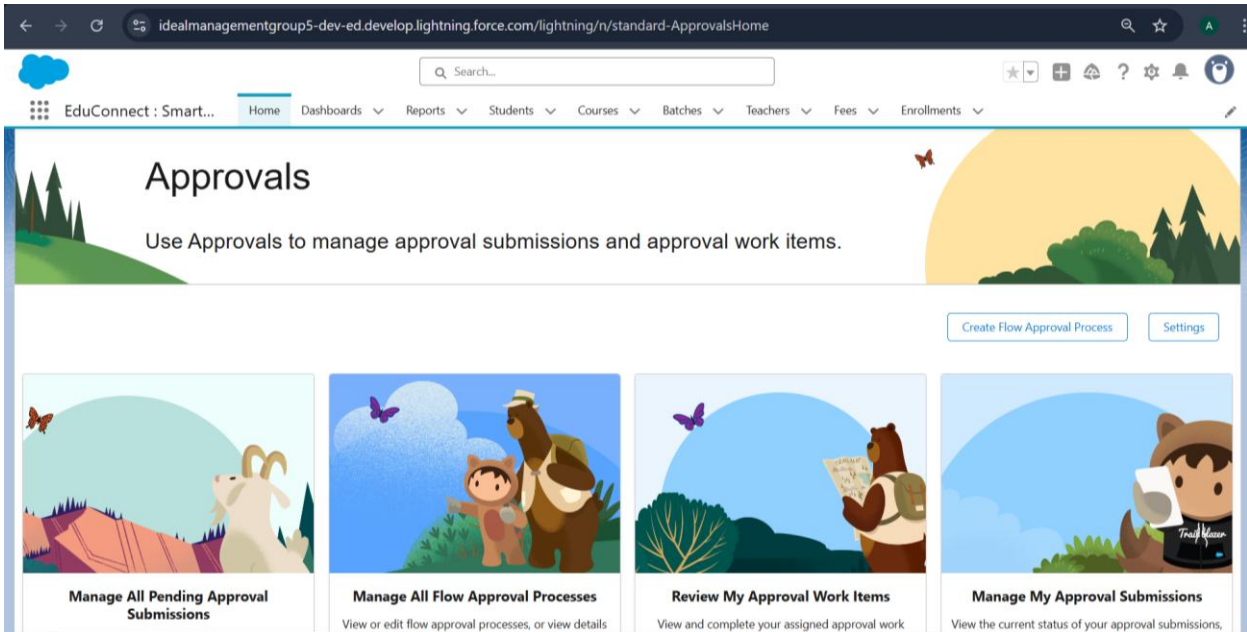
Tabs

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

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

Courses
All ⌄

New   Import   Printable View   Assign Label

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

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

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

Batches
All ⌄

New   Import   Change Owner   Printable View   Assign Label

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

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

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

Teachers
All ⌄

New   Import   Change Owner   Printable View   Assign Label

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

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

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

Fees
All ⌄

New   Import   Change Owner   Printable View   Assign Label

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

	Course Name ↑	Amount paid	Amount Remai...	Course Fee	Date of p...	Due Date	Status	Student	Student Ema...	Student id	Record ID
1	AWS	900	₹11,100.00	12,000	25/9/2025		Pending	New Student2		STU2001	a04Qy00000ArhSVIAZ
2	AWS	12,000	₹0.00	12,000	25/9/2025		Paid	New Student3		STU2003	a04Qy00000ArnBNIAZ
3	Java Programming	2,000	₹8,000.00	10,000	24/9/2025	30/9/2025	Pending	Rahul Mehra	rahul@gmail.co...	S004	a04Qy00000ApVdflAF
4	Mathematics	1,000	₹0.00	1,000			Paid	Test Student	teststudent@g...	STU1003	a04Qy00000AirsmIAB
5	Mathematics	1,000	₹0.00	1,000	25/9/2025		Paid	New Student		STU2002	a04Qy00000ArpgAIAR
6	Python	5,000	₹10,000.00	15,000	12/9/2025		Pending	Test Student	test@example.c...	S001	a04Qy00000AJ3HYIA1
7	Python	5,000	₹5,000.00	10,000	18/9/2025	17/9/2025	Pending	Arya	arya@gmail.com	S001	a04Qy00000AZ9XMIA1
8	Python for Data Science	5,000	₹15,000.00	20,000		30/9/2025	Pending	Arya	arya@gmail.com	S005	a04Qy00000ApcQVIAZ
9	Web Development	12,000	₹3,000.00	15,000	13/9/2025		Pending	Rahul Mehra	rahul@gmail.co...	S001	a04Qy00000AJGmXIAX

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

Enrollments
All ⌄

New   Import   Printable View   Assign Label

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

	Enrollment Name ↑	Batch	Enrollment Date	Status	Student	
1	E001	Python	20/9/2025	Approved	Arya	⌄
2	E002	Android Developmet	24/9/2025	Approved	Rahul Mehra	⌄
3	E003	Java Programming	22/9/2025	Approved	Bhavesh Dayal	⌄
4	E004	Web Dev	23/9/2025	Draft	Test Student	⌄
5	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.
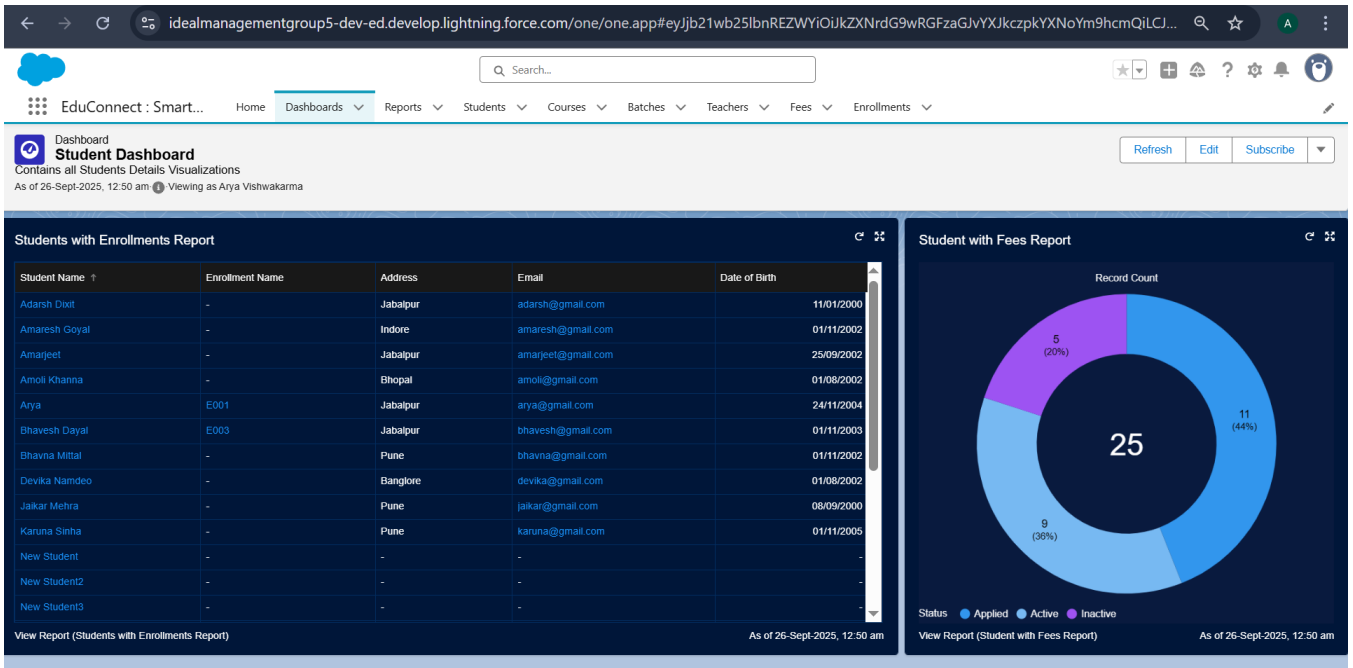
Conclusion

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.