

## 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**.



Search Setup



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	▼



Search Setup



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Course

Details

Fields & Relationships

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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	▼



Search Setup



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Fees

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Object Limits

Validation Rules

4 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Amount_paid_no_negative	Top of Page	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	▼

SETUP > OBJECT MANAGER

## Teacher

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

### Validation Rules

2 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
<a href="#">faculty_Department_Rule</a>	Top of Page	Department Field must be filled	✓	Arya Vishwakarma, 13/09/2025, 11:57 am
<a href="#">Faculty_Email_Rule</a>	Top of Page	Enter a Valid Email Address	✓	Arya Vishwakarma, 13/09/2025, 11:55 am

New

SETUP > OBJECT MANAGER

## Student

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

### Validation Rules

3 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
<a href="#">Student_contact_Rule</a>	Top of Page	Phone number must be 10 digits.	✓	Arya Vishwakarma, 13/09/2025, 12:45 pm
<a href="#">Student_Email_Rule</a>	Top of Page	Enter a Valid Email Id.	✓	Arya Vishwakarma, 13/09/2025, 12:41 pm
<a href="#">Student_Name_rule</a>	Top of Page	Student name is required.	✓	Arya Vishwakarma, 13/09/2025, 12:47 pm

New

## 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.

The screenshot shows the Salesforce Setup interface for Workflow Rules. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. Below the sidebar, there's a search bar with 'workflow' entered. The main content area is titled 'Workflow Rules' and shows the configuration for a rule named 'Pending fees remainder'. The rule is active and evaluates the 'Fees' object. The evaluation criteria are 'Evaluate the rule when a record is created, and every time it's edited'. The rule criteria are 'AND( Amount\_Remaining\_\_c > 0, Due\_Date\_\_c < TODAY() )'. The rule was created by Arya Vishwakama on 19/09/2025 at 11:36 am. Below the rule details, there are sections for 'Workflow Actions', 'Immediate Workflow Actions', and 'Time-Dependent Workflow Actions'. A message states: 'You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited"'. There are links for 'Edit', 'Clone', 'Deactivate', and 'Help for this Page'.

The screenshot shows the Salesforce Setup interface for Workflow Rules, specifically the 'Rule Criteria' section. The left sidebar is the same as the previous screenshot. The main content area is titled 'Workflow Rules' and shows the configuration for a rule named 'Pending fees remainder'. The rule is active and evaluates the 'Fees' object. The evaluation criteria are 'Evaluate the rule when a record is: created, and every time it's edited'. The rule criteria are 'AND( Amount\_Remaining\_\_c > 0, Due\_Date\_\_c < TODAY() )'. The rule was created by Arya Vishwakama on 19/09/2025 at 11:36 am. Below the rule details, there are sections for 'Workflow Actions', 'Immediate Workflow Actions', and 'Time-Dependent Workflow Actions'. A message states: 'You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited"'. There are links for 'Edit', 'Clone', 'Deactivate', and 'Help for this Page'.

## 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.

Setup

Home

Object Manager

Data

Mass Transfer

Approval Requests

Feature Settings

Approval Settings

Process Automation

Approval Processes

Didn't find what you're looking for?

Try using Global Search.

Approval Processes

Enrollment: Enrollment\_Approval\_Process

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Process Definition Detail

Process Name

Enrollment\_Approval\_Process

Unique Name

Enrollment\_Approval\_Process

Description

ISPIKVAL( Status\_c, 'Draft')

Record Editability

Administrator ONLY

Approval Assignment Email Template

Smart Student Enrollment & Learning Portal

Initial Submitters

Batch Owner

Created By

Arya.Vishwakarma, 20/09/2025, 12:02 pm

Active

✓

Next Automated Approver Determined By

Allow Submitters to Recall Approval Requests

☐

Modified By

Arya.Vishwakarma, 20/09/2025, 12:09 pm

Initial Submission Actions

Add Existing

Add New

Action	Type	Description
Record Lock		Lock the record from being edited
Field Update		Enrollment status update

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions   Edit	1	Step 1			User: Arya.Vishwakarma	Final Rejection
Show Actions   Edit	2	Approval status			User: Arya.Vishwakarma	Final Rejection

Sales

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Opportunities

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Campaigns

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Reports

Chatter

Groups

Calendar

Enrollments

More

Enrollment

E001

New Contact

Edit

New Opportunity

Related

Details

Notes & Attachments (0)

Upload Files

Upload Files

Or drop files

Approval History (3)

Step Name	Date	Status	Assigned To
Approval status	20/09/2025, 12:21 pm	Approved	Arya Vishwakarma
Step 1	20/09/2025, 12:20 pm	Approved	Arya Vishwakarma
Approval Request Submitted	20/09/2025, 12:18 pm	Submitted	Arya Vishwakarma

View All

Activity

Calendar

Tasks

Chatter

Email

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

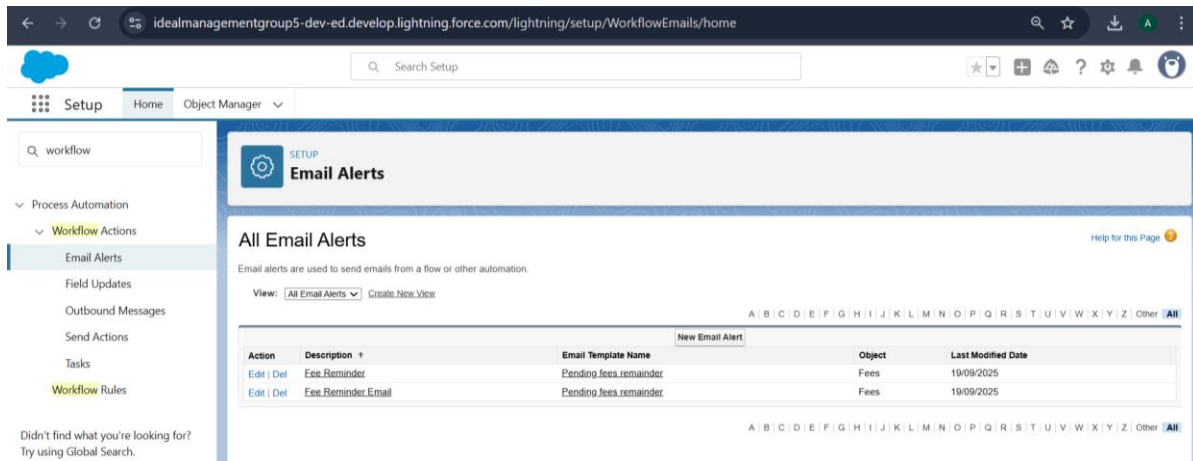
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

## Email Alerts

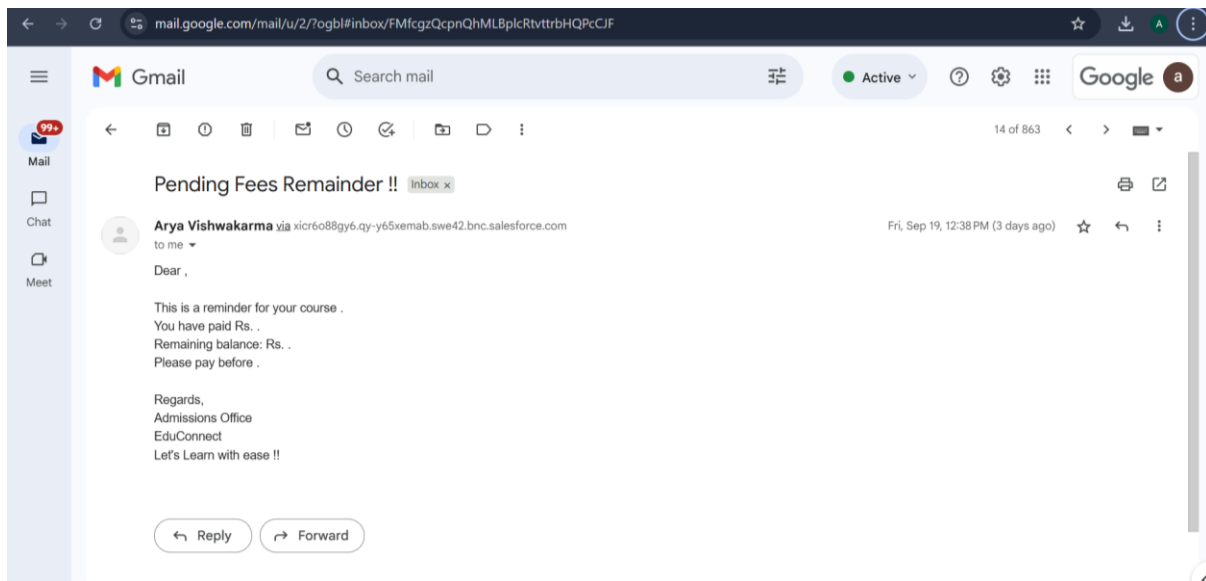
Email alerts were used to improve communication between students, faculty, and administrators:

- 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.



The screenshot shows the Salesforce Setup page for Email Alerts. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. Below these are sections for Process Automation, Workflow Actions, Email Alerts, Field Updates, Outbound Messages, Send Actions, Tasks, and Workflow Rules. The main content area is titled 'Email Alerts' and shows a list of all email alerts. The list has columns for Action, Description, Email Template Name, Object, and Last Modified Date. There are two alerts listed: 'Fee Reminder' and 'Fee Reminder Email', both with the object 'Fees' and a last modified date of 19/09/2025.

Action	Description	Email Template Name	Object	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	Fee Reminder	Pending fees remainder	Fees	19/09/2025
<a href="#">Edit</a>   <a href="#">Del</a>	Fee Reminder Email	Pending fees remainder	Fees	19/09/2025



The screenshot shows a Gmail inbox with an email titled 'Pending Fees Remainder !!'. The email is from Arya Vishwakarma (xicr6o88gy6-qy-y65xemab.swe42.bnc.salesforce.com) to the user. The email content is as follows:

Dear ,

This is a reminder for your course .  
 You have paid Rs. .  
 Remaining balance: Rs. .  
 Please pay before .

Regards,  
 Admissions Office  
 EduConnect  
 Let's Learn with ease !!

The email interface includes standard Gmail navigation and action buttons like Reply and Forward.

## 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.

The screenshot displays the Salesforce Setup interface for Workflow Field Updates. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'All Workflow Field Updates' and includes a 'New Field Update' button. Below the title, there is a table listing the field updates.

Action	Name	Field to Update	Operation	Value	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">approval status</a>	Enrollment: Status	Value	Approved	20/09/2025
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Changes the case priority to high</a>	Case: Priority	Value	High	12/09/2025
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Enrollment status update</a>	Enrollment: Status	Value	Pending Approval	20/09/2025
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">rejected status</a>	Enrollment: Status	Value	Dropped	20/09/2025

## 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.