EduConnect : Smart Learning and Enrollment CRM Portal (Phase 9)

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:

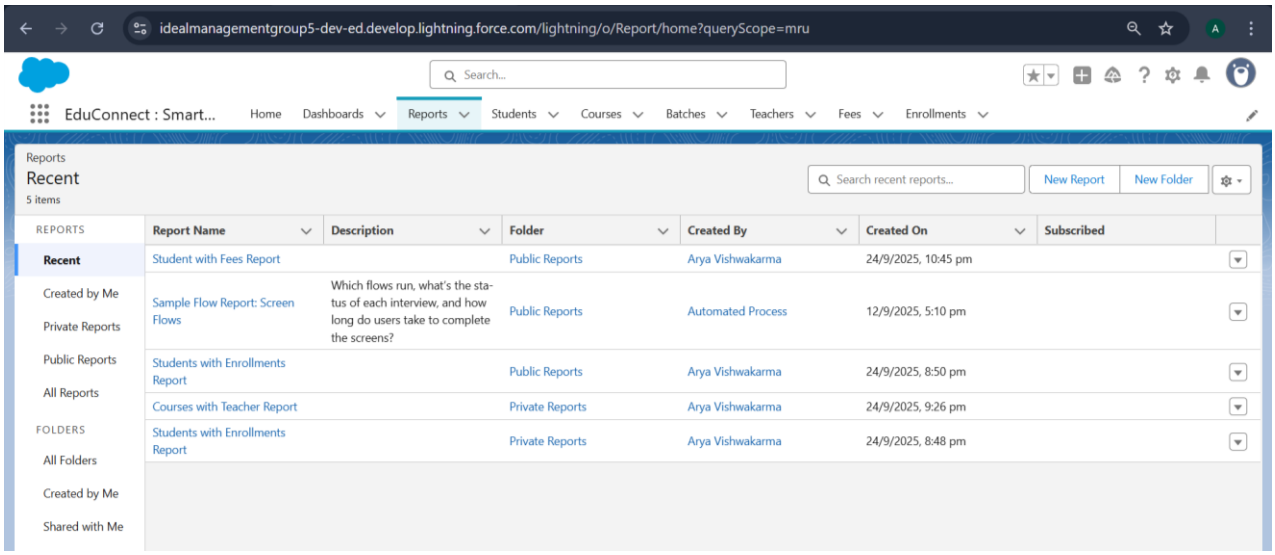
Educational institutes face challenges in managing student inquiries, admissions, and course enrollments due to manual processes. This causes delays, missed follow-ups, and inefficiency. A Salesforce-based portal will automate lead capture, admissions, fee tracking, and notifications, ensuring faster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

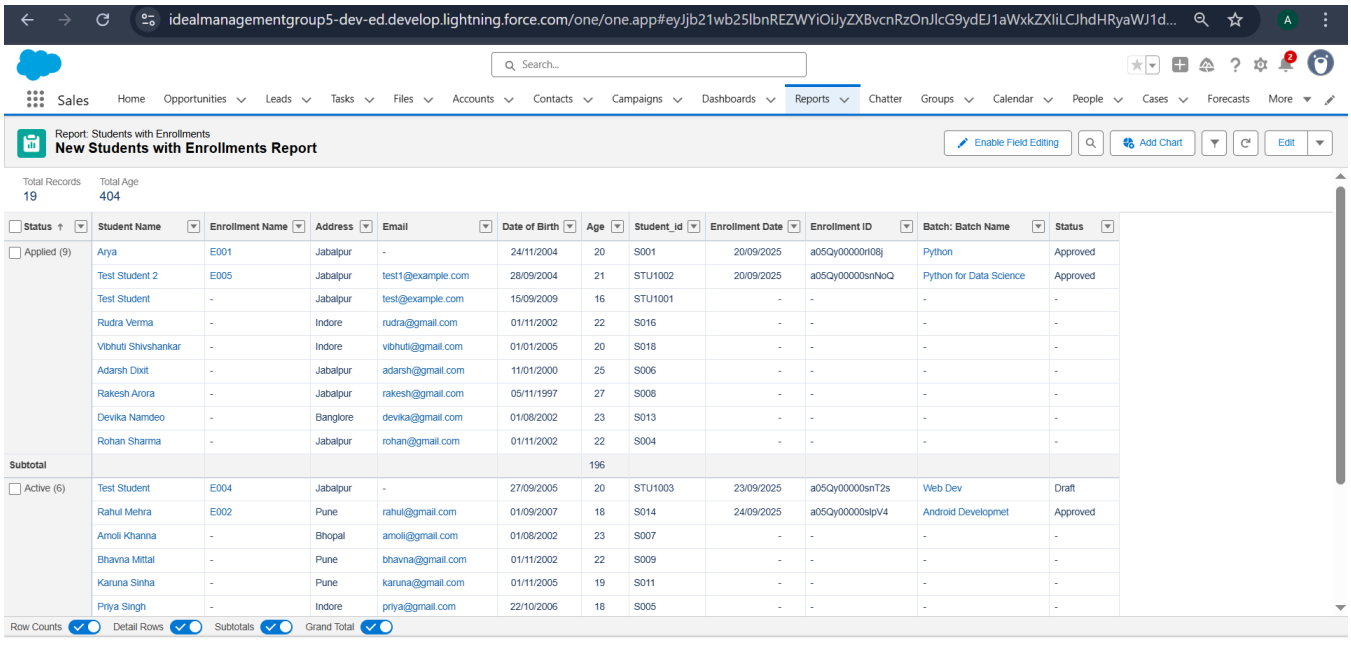
Phase 9: Reporting, Dashboards & Security Review

Phase 9 focuses on **Reporting, Dashboards, and Security Review** within Salesforce. In this phase, various reports and dashboards were created to provide actionable insights, and security measures were applied to ensure that sensitive student and financial data remains protected.

Reports

- Created an **Admissions Report** to track the number of student inquiries, applications, and confirmed admissions.
- Designed **Fee Collection Reports** to monitor paid, pending, and overdue fees.
- Built **Course Popularity Reports** to analyze which courses and batches had the highest enrollment.
- Enabled filtering and grouping options for faculty and management to analyze data effectively.

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Test Student - Jabalpur test@example.com 15/09/2009 16 STU1001 - - - -
Rudra Verma - Indore rudra@gmail.com 01/11/2002 22 S016 - - - -
Vibhuti Shivshankar - Indore vibhuti@gmail.com 01/01/2005 20 S018 - - - -
Adarsh Dixit - Jabalpur adarsh@gmail.com 11/01/2000 25 S006 - - - -
Rakesh Arora - Jabalpur rakesh@gmail.com 05/11/1997 27 S008 - - - -
Devika Namdeo - Banglore devika@gmail.com 01/08/2002 23 S013 - - - -
Rohan Sharma - Jabalpur rohan@gmail.com 01/11/2002 22 S004 - - - -
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Rahul Mehra E002 Pune rahul@gmail.com 01/09/2007 18 S014 24/09/2025 a05Qy00000slpV4 Android Developmet Approved
Amoli Khanna - Bhopal amoli@gmail.com 01/08/2002 23 S007 - - - -
Bhavna Mittal - Pune bhavna@gmail.com 01/11/2002 22 S009 - - - -
Karuna Sinha - Pune karuna@gmail.com 01/11/2005 19 S011 - - - -
Priya Singh - Indore priya@gmail.com 22/10/2006 18 S005 - - - -
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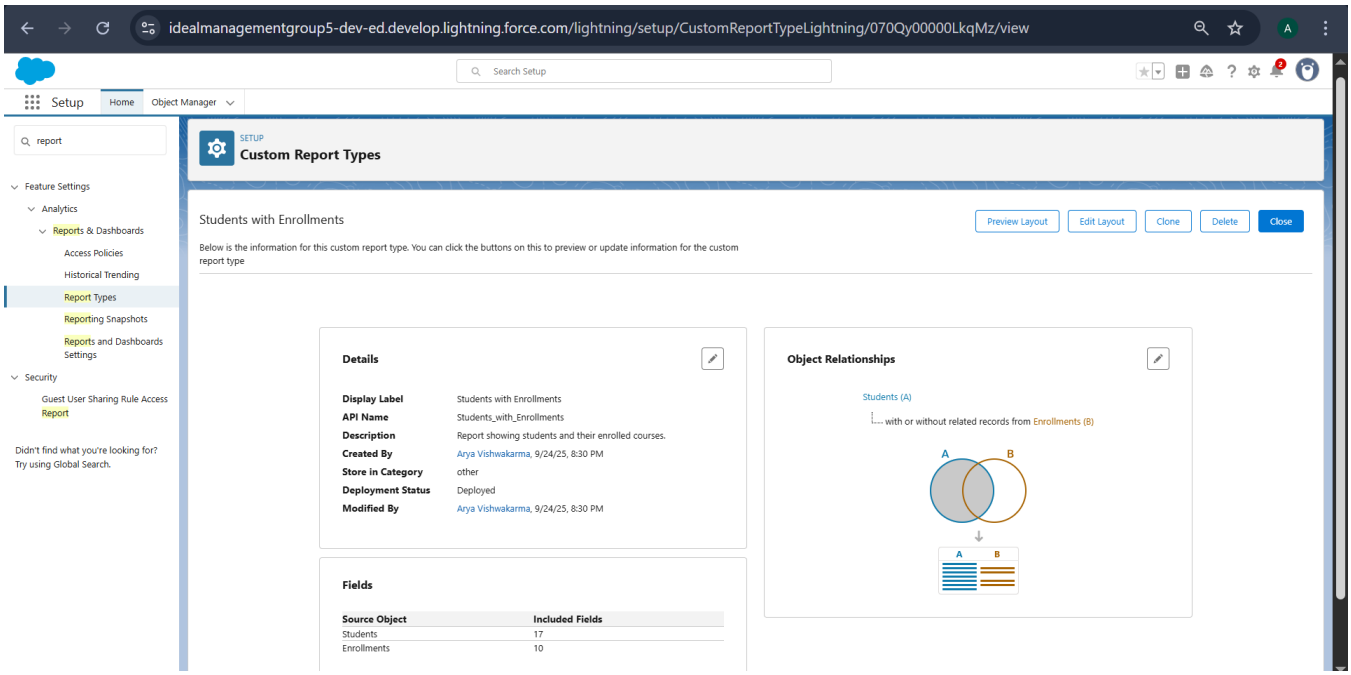
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Analytics
Reports & Dashboards
Access Policies
Historical Trending
Report Types
Reporting Snapshots
Reports and Dashboards Settings
Security
Guest User Sharing Rule Access Report
Didn't find what you're looking for? Try using Global Search.
SETUP
Custom Report Types
Students with Enrollments
Preview Layout
Edit Layout
Clone
Delete
Close
Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type
Details
Display Label Students with Enrollments
API Name Students_with_Enrollments
Description Report showing students and their enrolled courses.
Created By Arya Vishwakarma, 9/24/25, 8:30 PM
Store in Category other
Deployment Status Deployed
Modified By Arya Vishwakarma, 9/24/25, 8:30 PM
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... with or without related records from Enrollments (B)
A
B
Fields
Source Object
Included Fields
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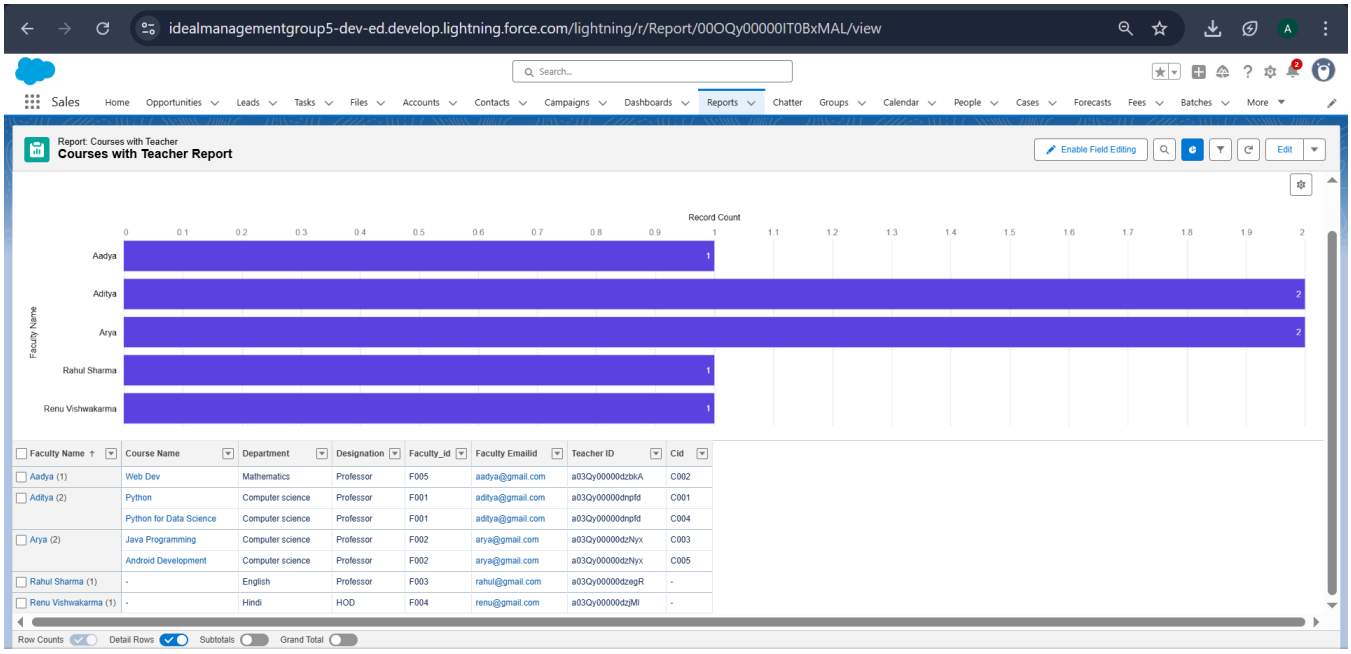
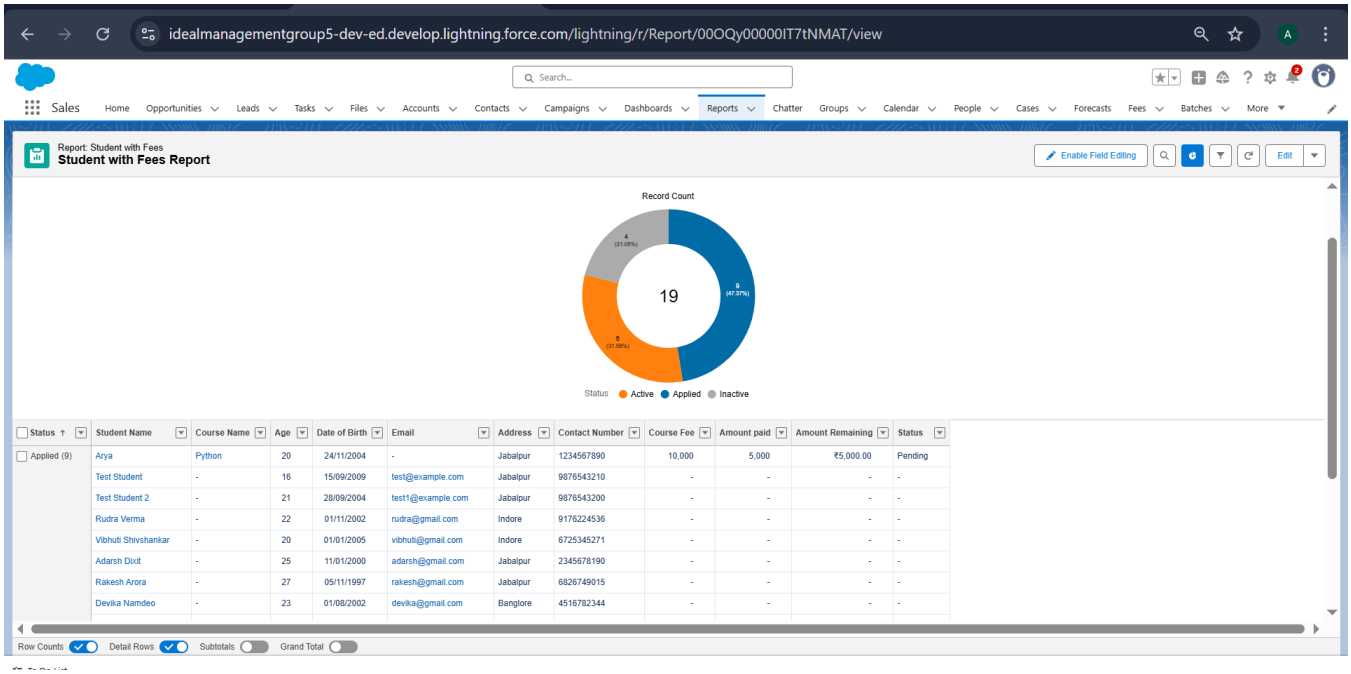
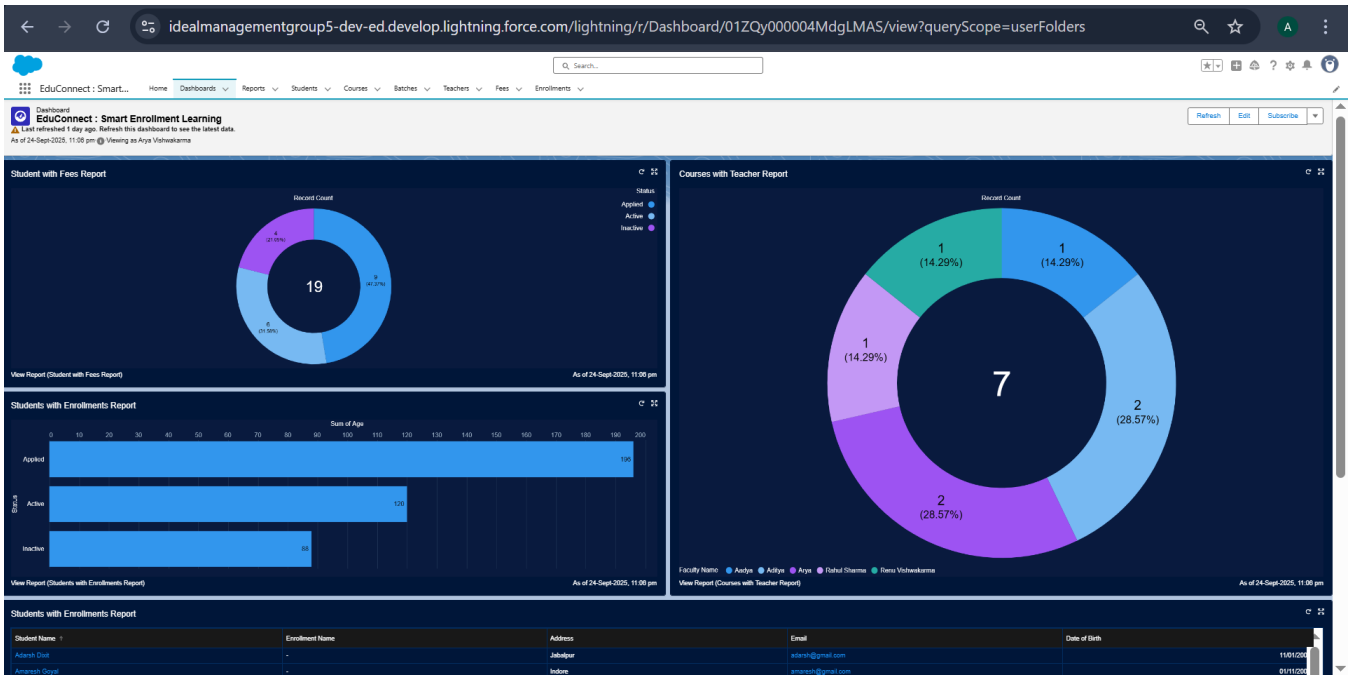
Enrollments 10

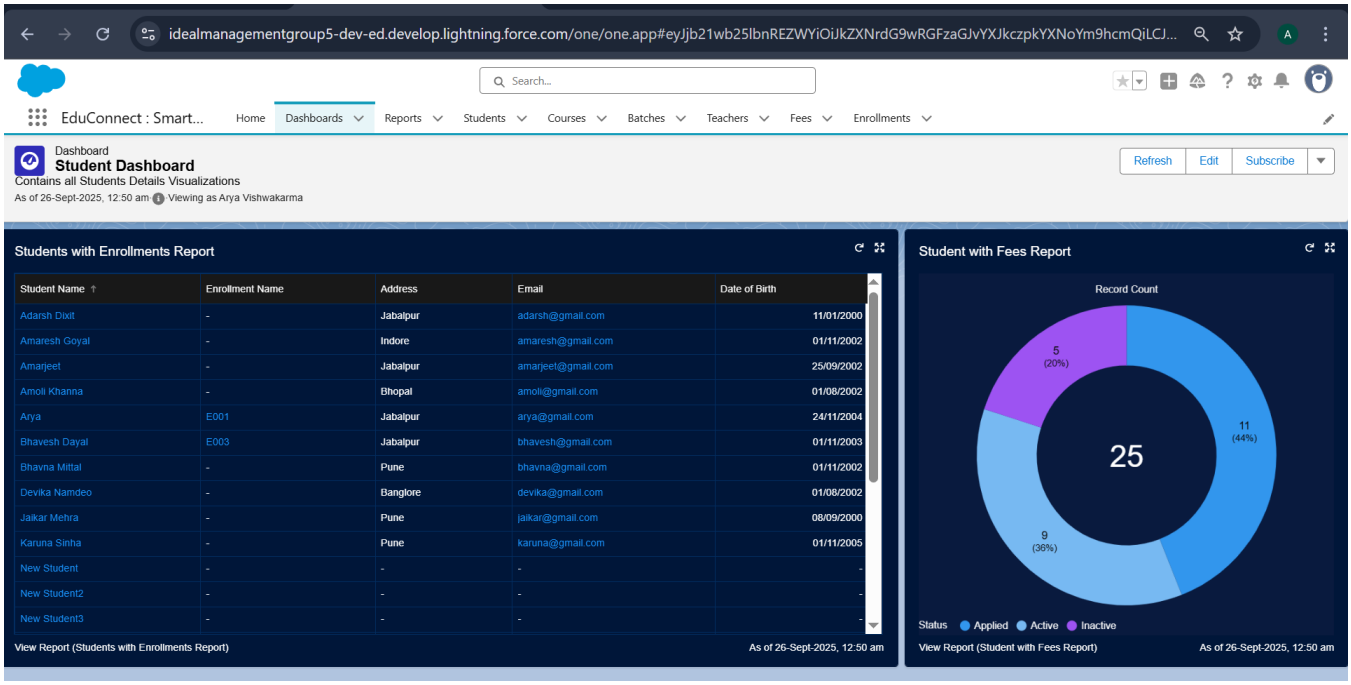




Dashboards

- Developed a **Management Dashboard** with visual charts showing admissions, revenue, and enrollment trends.
- Configured **Dynamic Dashboards** to ensure that users only see data according to their roles (e.g., faculty, management).
- Used graphs and visual indicators for **real-time decision-making**.





Security Review

- Applied **Field-Level Security (FLS)** to protect sensitive data such as student personal details and fee records.
- Enabled **Audit Trail** to track configuration and data changes made by administrators.
- Configured **Login IP Ranges** and **Session Settings** to enhance login security.
- Reviewed **Sharing Settings** to ensure controlled access to records based on role hierarchy.

Conclusion

Phase 9 successfully provided **data-driven insights** through reports and dashboards, while also reinforcing **security and compliance**. With these measures, the system became more **transparent, secure, and reliable**, empowering institutes to make informed decisions while safeguarding student information.