

EduConnect : Smart Learning and Enrollment CRM Portal (Phase 8)

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 8: Data Management & Deployment

Phase 8 focuses on **Data Management and Deployment**, ensuring that data is imported, secured, and maintained properly, while also preparing the system for deployment from sandbox to production. This phase helped establish data integrity and a smooth transition into a production-ready environment.

Data Import & Migration

- Imported **Student and Course data** using **Data Loader**.
- Migrated existing admission records into the portal to ensure continuity.
- Verified data consistency after import to avoid duplication and errors.

[illegible]

idealmanagementgroup5-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home

Search Setup

Setup Home Object Manager

Getting closer

Choose data Edit mapping Start Import

Import your Data into Salesforce

You can import up to 50,000 records at a time.

What kind of data are you importing?

Standard objects Custom objects

Batches Courses Enrollments Fees Students Teachers

What do you want to do?

Add new records

Match by: --None--

Which User field in your file designates record owners? --None--

Which Course field in your file do you want to match against to set the Course lookup field? Cid (External ID)

Which Batch field in your file do you want to match against to set the Batch lookup field? Batch Name

Which Fees field in your file do you want to match against to set the Fees lookup field?

Where is your data located?

Drag CSV file here to upload

CSV

File Choose File Test.csv

Character Code ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Values Separated By Comma

Cancel Previous Next

idealmanagementgroup5-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home

Search Setup

Setup Home Object Manager

Almost done

Choose data Edit mapping Start Import

Edit Field Mapping: Students

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you want.

Edit	Mapped Salesforce Object	CSV Header
Map	Unmapped	Student_Name
Change	Student_id	Student_id
Change	Email	Email
Change	Date of Birth	Date_of_Birth
Change	Contact Number	Contact_Number
Change	Address	Address
Change	Status	Status
Map	Unmapped	Courseid

Map your field: Student_Name

Select field

Student Name Student_id Email Contact Number Address Date of Birth

Cancel Map

Example

Adarsh Dixit S006 adarsh@gmail.com 11/1/2000 2345678190 Jabalpur Applied C001 C002 C002

Cancel Previous Next

idealmanagementgroup5-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home

Search Setup

Setup Home Object Manager

Great job

Choose data Edit mapping Start Import

Review & Start Import

Review your import information and click Start Import.

Your selections:

Students Add new records Test.csv

Your import will include:

Mapped fields 9

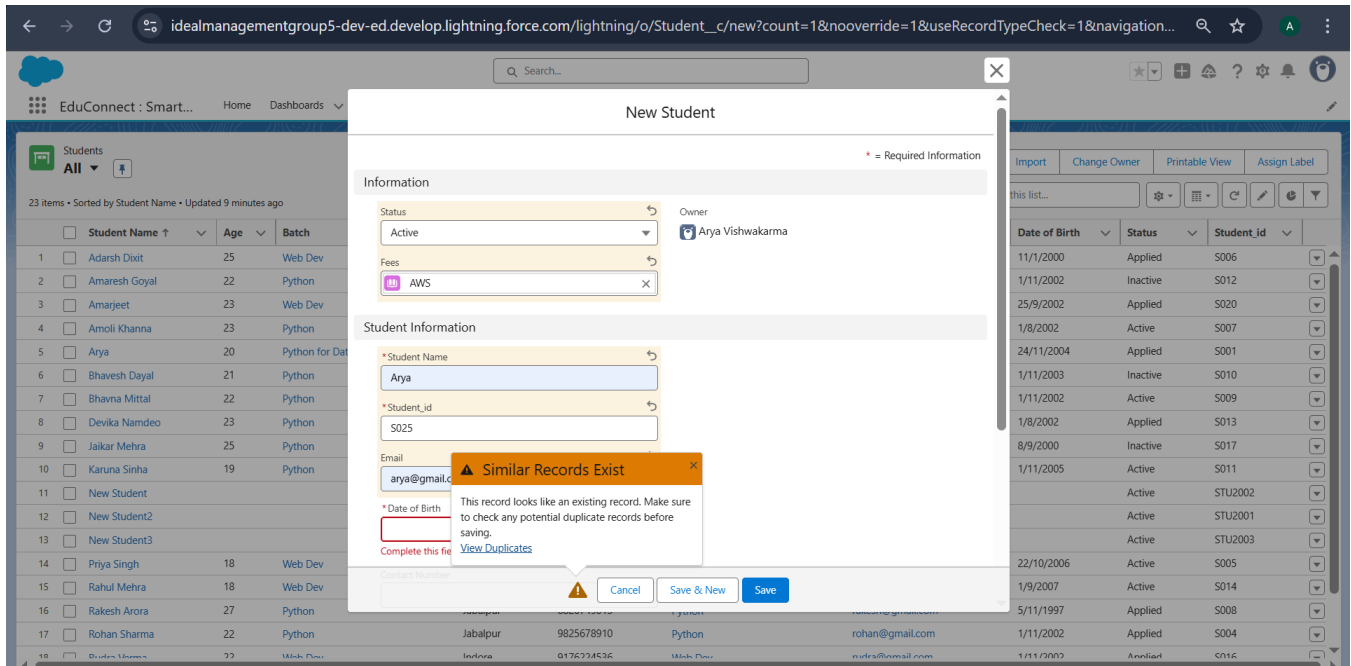
Your import will not include:

Unmapped fields 0

Cancel Previous Start Import

Duplicate Management

- Defined **Duplicate Rules** to prevent multiple admissions for the same student.
- Implemented matching criteria based on **Student Email** and **Student ID**.
- Reduced errors caused by duplicate records in the system..



Conclusion

Phase 8 ensured proper **data management and deployment practices**. With data import, duplicate prevention, scheduled backups, and safe deployment, the system was made **reliable, secure, and production-ready**, laying a strong foundation for long-term sustainability.