

EduConnect : Smart Learning and Enrollment CRM Portal(Phase 3)

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 3: Data Modeling and Relationships

Phase 3 focuses on Data Modeling and Relationships within the Salesforce platform. In this phase, various standard and custom objects are created, fields are defined, and relationships are established to build the Smart Student Enrollment and Learning Portal. Additionally, page layouts are designed to provide a user-friendly interface for managing records.

Custom Objects and Their Fields

Course Object

- Course Name (Text, Required)
- Cid (Text, External ID, Required)
- Duration in Days (Number)
- Course Fees (Number, Required)
- Teacher (Lookup → Teacher Object)
- Batch Name (Master-Detail → Batch Object)
- Fees (Master-Detail → Fees Object)

New Course

* = Required Information

Course Details

* Course Name

* Cid

Duration in days

* Course Fees

Course Related Info

Teacher

Search Teachers...

Cancel Save & New Save

Nothing to see here

* Cid

Duration in days

* Course Fees

Course Related Info

Teacher

Search Teachers...

* Batch

Search Batches...

* Fees

Search Fees...

Cancel Save & New Save

Nothing to see here

Batch Object

- Batch Name (Text, Required)
- Batch ID (Text, Required)
- Start Date (Date)
- End Date (Date)
- Cid (Text, Required)
- Course (Lookup → Course Object)
- Teacher (Lookup → Teacher Object)
- Student (Lookup → Student Object)

The image displays two screenshots of a Salesforce 'New Batch' form. The top screenshot shows the 'Information' section with the following fields:

- Batch Name** (Required): A text input field.
- Batch id** (Required): A text input field.
- Start date**: A date picker field.
- End date**: A date picker field.

The bottom screenshot shows the 'Fees Object' section with the following fields:

- Cid** (Required): A text input field.
- Course**: A search dropdown field labeled 'Search Courses...'.
- Teacher**: A search dropdown field labeled 'Search Teachers...'.
- Student**: A search dropdown field labeled 'Search Students...'.

Both screenshots show a 'Cancel' button, a 'Save & New' button, and a 'Save' button at the bottom of the form.

Fees Object

- Course Name (Text, Required)
- Course Fees (Number, Required)
- Amount Paid (Number)
- Date (Date, Required)
- Student ID (Text, Required / Could be Lookup → Student Object)
- Amount Remaining (Formula: Course Fees - Amount Paid)

idealmanagementgroup5-dev-ed.develop.lightning.force.com/lightning/o/Fees__c/new?count=7&nooverride=1&useRecordTypeCheck=1&navigationLocation...

Search...

Sales Home Op

Fees

Recently Viewed

2 items • Updated a few seconds ago

Course Name

1 Web Development

2 Python

Fee Information

* Course Fee

Amount paid

Date of payment

* Course Name

* Student id

Cancel Save & New Save

To Do List

Student Object

- Student Name (Text, Required)
- Student ID (Text, Required)
- Student Email (Email)
- Date of Birth (Date, Required)
- Age (Formula → calculated from Date of Birth)
- Contact Number (Text)
- Address (Text)
- Course (Lookup → Course Object)
- Batch (Lookup → Batch Object)

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Search...

Sales Home Op

Students

Recently Viewed

0 items • Updated a few seconds ago

Student Information

* Student Name

* Student_id

Student_email

* Date of Birth

Contact Number

Address

Cancel Save & New Save

Students

Recently Viewed

0 items • Updated a few seconds ago

* Date of Birth

Contact Number

Address

Enrollment Details

Course

Search Courses...

Batch

Search Batches...

Cancel Save & New Save

Teacher Object

- Faculty Name (Text, Required)
- Faculty ID (Text, Required)
- Department (Text)
- Designation (Text)
- Faculty Email (Email, Required/Unique)

Teachers

Recently Viewed

0 items • Updated a few seconds ago

Faculty Details

* Faculty Name

* Faculty_id

Department

Designation

Faculty Emailid

Cancel Save & New Save

Enrollment Object

- Enrollment Name (Text, Required)
- Batch (Lookup → Batch Object, Required)
- Student (Lookup → Student Object, Required)
- Enrollment Date (Date)

- Status (Picklist: Enrolled, Completed, Dropped, Waitlist)

Relationships Between Objects

- Course ↔ Teacher: Lookup Relationship
- Course ↔ Batch: Master-Detail Relationship
- Course ↔ Fees: Master-Detail Relationship
- Batch ↔ Teacher: Lookup Relationship
- Batch ↔ Student: Lookup Relationship
- Fees ↔ Student: Lookup (or Text-based association)
- Student ↔ Course: Lookup Relationship
- Enrollment (Junction Object): Connects Students and Batches with Master-Detail Relationships

Page Layouts

Course Object – Page Layout

- Sections: Course Info (Course Name, Cid, Duration in Days, Course Fees), Course Related Info (Teacher, Batch, Fees)
- Key Customization: Fields grouped logically, required fields enforced, relationships clearly visible.

Batch Object – Page Layout

- Section: Information (Batch Name, Batch ID, Start Date, End Date, Cid, Course, Teacher, Student)
- Key Customization: Single-section layout, mandatory fields for integrity, lookup fields for cross-object relationships.

Teacher Object – Page Layout

- Section: Faculty Details (Faculty Name, Faculty ID, Department, Designation, Faculty Email)
- Key Customization: Clean section, mandatory fields, academic structuring with Department and Designation.

Fees Object – Page Layout

- Sections: Fees Information (Course Name, Course Fees, Amount Paid, Date), Associate Student (Student ID)
- Key Customization: Two sections for clarity, financial integrity enforced, ability to track payment status.

Student Object – Page Layout

- Sections: Student Information (Name, ID, Email, DOB, Contact, Address), Enrollment Details (Course, Batch)
- Key Customization: Two-section layout, formula-based age calculation, lookup relationships to Course and Batch.

Enrollment Object – Page Layout

- Section: Information (Enrollment Name, Batch, Student, Enrollment Date, Status)
- Key Customization: Single-section layout, junction relationships to Batch and Student, picklist for status tracking.

Conclusion

Phase 3 successfully defined the data model for the Smart Student Enrollment and Learning Portal. By creating six custom objects, establishing relationships, and designing page layouts, a strong foundation has been built for managing student enrollments, courses, fees, teachers, and batches. This structured data model ensures seamless integration, efficient navigation, and accurate record management across the system.