Salesforce Implementation for Ed-tech Industry

PROJECT REPORT
Week 2

By,
Jeraled Giltus P

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1. **Introduction:**

➢ The ed-tech industry is undergoing a significant transformation, driven by the increasing demand for innovative learning solutions and the rapid adoption of digital technologies.

➢ To stay competitive and deliver personalized learning experiences, ed-tech companies must leverage robust customer relationship management (CRM) systems.

➢ Salesforce, a leading CRM platform, offers comprehensive tools and functionalities that can streamline operations, enhance engagement, and improve overall efficiency.

➢ As part of my internship project, I am undertaking the implementation and customization of Salesforce for an ed-tech company.

➢ This involves configuring the Salesforce Org to align with the company's branding, creating custom objects to manage educational processes, and setting up custom fields to capture essential data.

➢ The goal is to develop a tailored Salesforce environment that supports the unique needs of the ed-tech industry, facilitating better management of trainees, employees, leads, and campaigns.

➢ In this initial week, I have focused on setting up the foundational aspects of the Salesforce Org and starting the development of key custom objects and fields. The following sections provide a detailed account of the tasks completed and the progress made during this period.

2. Week 2 Summary:

➢ During the second week of my internship, I focused on automation using Salesforce Flow Builder.

➢ This involved designing and implementing automated processes to enhance efficiency and reduce manual workload. Below are the detailed activities and achievements of the week:

Automation Design:

✓ Analyzed business processes to identify opportunities for automation.

✓ Collaborated with stakeholders to gather requirements and understand workflow needs.

Flow Builder Implementation:

✓ Created and tested several flows to automate key business processes.

✓ Developed screen flows, record-triggered flows, and scheduled flows to handle various scenarios.

Optimization and Troubleshooting:

✓ Optimized existing workflows to improve performance and reliability.

✓ Troubleshooted and resolved issues encountered during flow execution.

3. Salesforce Flow:

➢ Salesforce Flow is a powerful automation tool within Salesforce that allows users to create and manage complex workflows without needing to write code.

➢ It provides a user-friendly interface to design flows that automate various business processes, making it an essential tool for enhancing efficiency.

Types of Flows:

Screen Flows:

✓ Interactive flows that guide users through a series of screens to collect or display information.

✓ Useful for creating guided interactions, such as on boarding processes or customer support workflows.

Record-Triggered Flows:

✓ Automatically execute when a record is created, updated, or deleted.

✓ Ideal for automating tasks like updating related records, sending notifications, or applying business logic based on record changes.

Scheduled Flows:

✓ Run at specified times or intervals.

✓ Suitable for regular maintenance tasks, such as sending periodic reports or performing batch updates.

Platform Event-Triggered Flows:

✓ Triggered by platform events to respond to real-time events and changes within Salesforce or external systems.
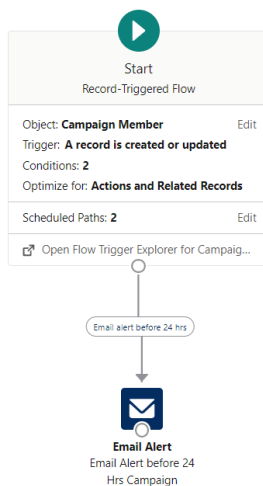
3.1 Flow Work :

3.2 Flow 1 (24 Hrs Prior Send Email to Campaign Members)

✧ For this flow, I have created an custom field on campaign members and when the member is inserted the the field is automatically is filled from campaign object field(webinar start date and time) using Apex trigger I have done.

✧ As same as , when the webinar start date and time is updated in campaign object the custom field in campaign member object also updated, I can done this with the help of Apex trigger.

✧ Then in flow I have used record-triggered flow and I have used scheduled path to trigger an email to campaign members one day before.

Template :

Email Template   Send Test and Verify Merge Fields

Subject | Reminder: Webinar on {!CampaignMember.Event_Date_and_Time__c}

Plain Text Preview

Dear All,

We hope this message finds you well! This is a friendly reminder that our highly anticipated webinar on "Trends of Salesforce" is just around the corner. We're excited to have you join us and wanted to ensure you have all the details you need to participate

Webinar Details:

Topic: Trends of Salesforce
Date:& Time : {!CampaignMember.Event_Date_and_Time__c}

Access the Webinar:

Join the Webinar Here:
Meeting ID: 18909876543
Passcode: iLearnings

Agenda Highlights:

Introduction and Welcome
Keynote Presentation
Interactive Q&A Session
Closing Remarks
What to Prepare:

Ensure you have a stable internet connection.
Have your questions ready for the Q&A session.
Check that your microphone and camera (if you wish to participate with video) are functioning properly.

If you have any questions or require assistance before the webinar, please don't hesitate to contact us at [Support Email] or call us at [Support Phone Number].

We look forward to seeing you online tomorrow!

Best regards,
iLearnings Team

Flow :

Result :
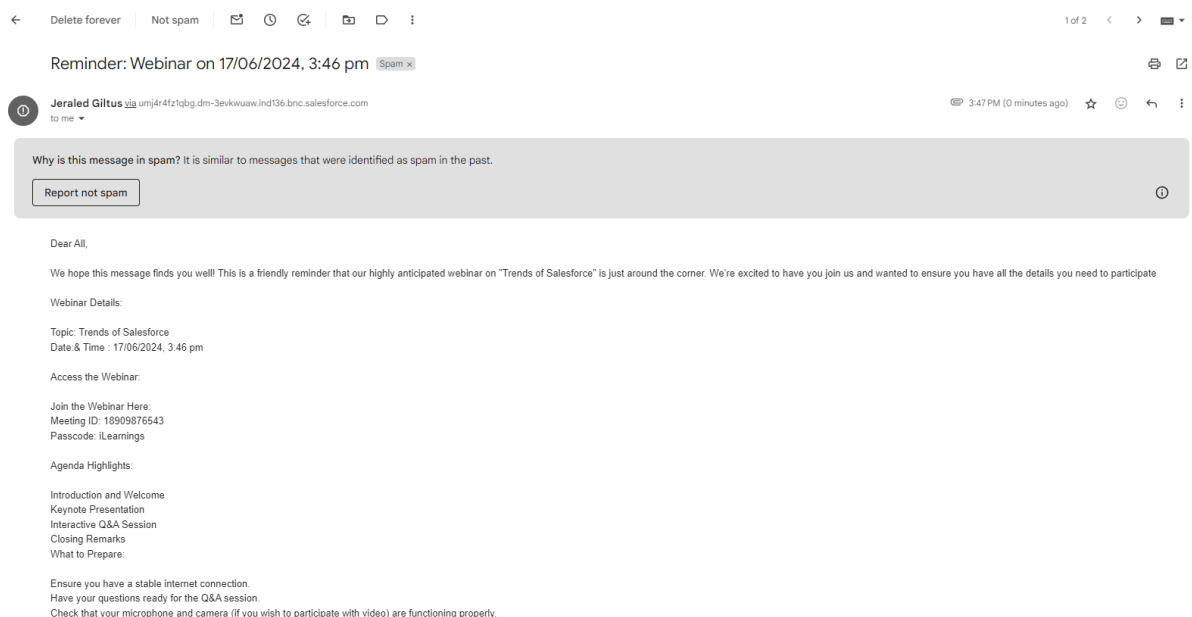
3.3 Flow 2 (1 Hr Prior Send Email to Campaign Members)

✧ For this flow, I have created an custom field on campaign members and when the member is inserted the the field is automatically is filled from campaign object field(webinar start date and time) using Apex trigger I have done.

✧ As same as , when the webinar start date and time is updated in campaign object the custom field in campaign member object also updated, I can done this with the help of Apex trigger.

✧ Then in flow I have used record-triggered flow and I have used scheduled path to trigger an email to campaign members one hour before

Template :

Flow :

Result :

Email Template [Send Test and Verify Merge Fields]

| Subject | Reminder: Webinar on {!CampaignMember.Event_Date_and_Time__c}

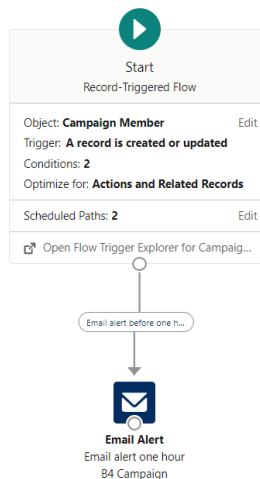| Plain Text Preview |

Dear {!CampaignMember.FirstName} {!CampaignMember.LastName},

Join our "Webinar in One hour with Live "!

See you there!

Best,
Team iLearnings

Best regards,
iLearnings Team

3.4 Flow 3 (5 Minute Prior Send Email to Campaign Members)

◇ For this flow, I have created an custom field on campaign members and when the member is inserted the the field is automatically is filled from campaign object field(webinar start date and time) using Apex trigger I have done.

◇ As same as , when the webinar start date and time is updated in campaign object the custom field in campaign member object also updated, I can done this with the help of Apex trigger.

◇ Then in flow I have used record-triggered flow and I have used scheduled path to trigger an email to campaign members one minute before.

Template :

Email Template [Send Test and Verify Merge Fields]

| Subject | Remainder : We are Live !!

| Plain Text Preview |

Dear {!CampaignMember.FirstName} {!CampaignMember.LastName},

Join our "Webinar in 5 Minute with Live "!

See you there!

Best,
Team iLearnings

Flow :

Result :

Dear iLearn Lead2,

Join our "Webinar in 5 Minute with Live "!

See you there!

Best,
Team iLearnings
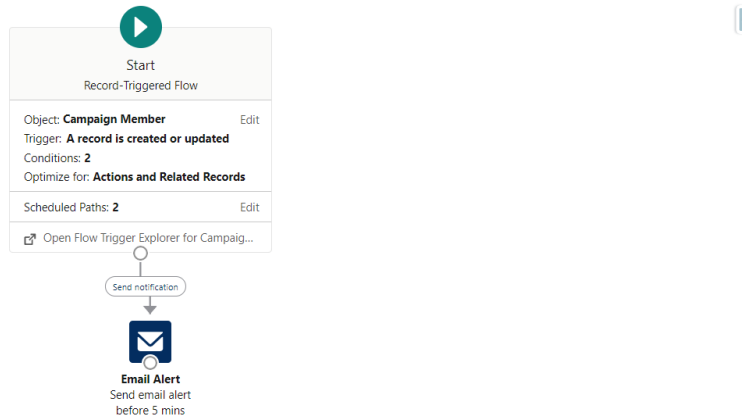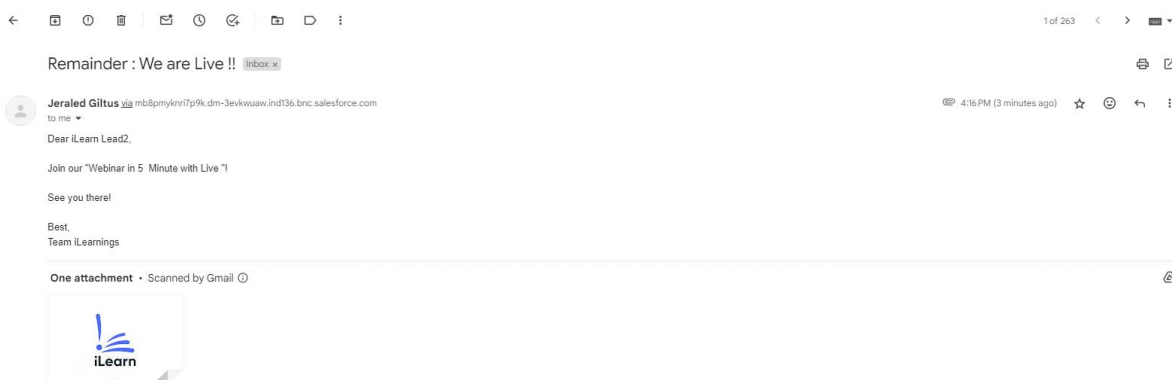
3.5 Flow 4 (One Hour After Send Email to Campaign Members)

✧ For this flow, I have created an custom field on campaign members and when the member is inserted the the field is automatically is filled from campaign object field(webinar end date and time) using Apex trigger I have done.

✧ As same as , when the webinar end date and time is updated in campaign object the custom field in campaign member object also updated, I can done this with the help of Apex trigger.

✧ Then in flow I have used record-triggered flow and I have used scheduled path to trigger an email to campaign members one hour after.

Template :

Email Template   [Send Test and Verify Merge Fields]

Subject | Thank You for Attending Our Webinar!

Plain Text Preview |

Dear {!CampaignMember.FirstName} {!CampaignMember.LastName}

Thank you for joining our webinar, "Trends of Salesforce," earlier today! We truly appreciate your participation and hope you found the session insightful and valuable.

We understand that your time is precious, and we are grateful that you chose to spend it with us. If you have any questions or need further information on any of the topics discussed, please feel free to reach out.

Here's what's next:
Recording & Slides: We will be sending you the recording of the webinar along with the presentation slides within the next 24 hours. Keep an eye on your inbox!
Survey: We'd love to hear your feedback! Please take a moment to complete our short survey [insert link] so we can continue to improve our future webinars.
Stay Connected: Follow us on ilearnings in instagram for updates on our latest content, webinars, and more.
If you enjoyed the webinar, feel free to share your experience on social media and tag us with @iLearnings

Once again, thank you for your participation. We look forward to seeing you at our next event!

Best regards,
iLearnings

Flow :
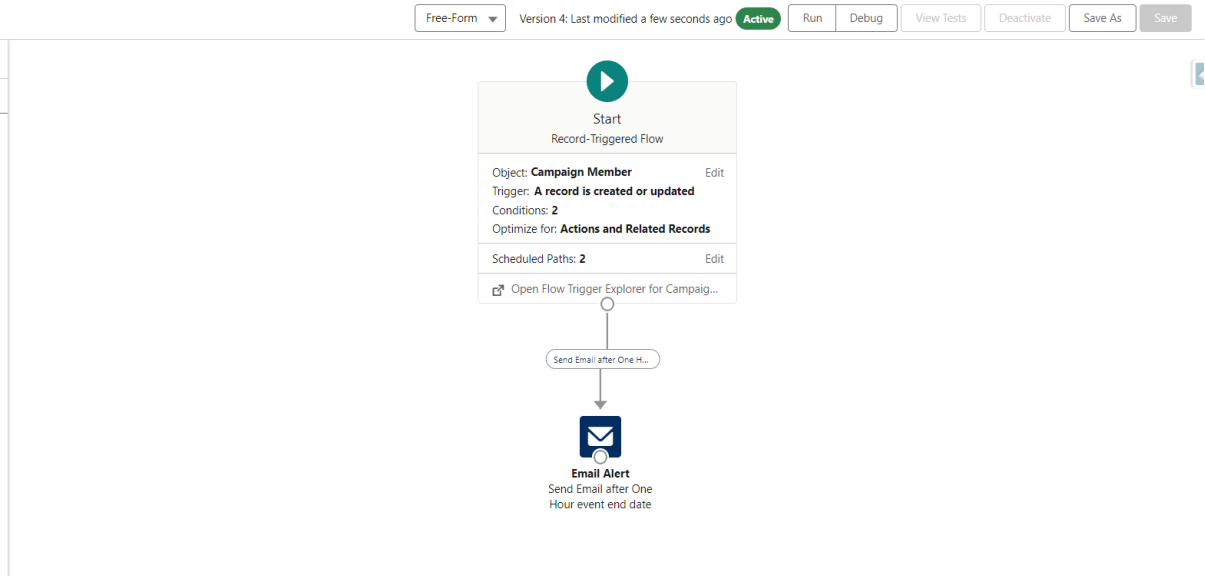
Result :
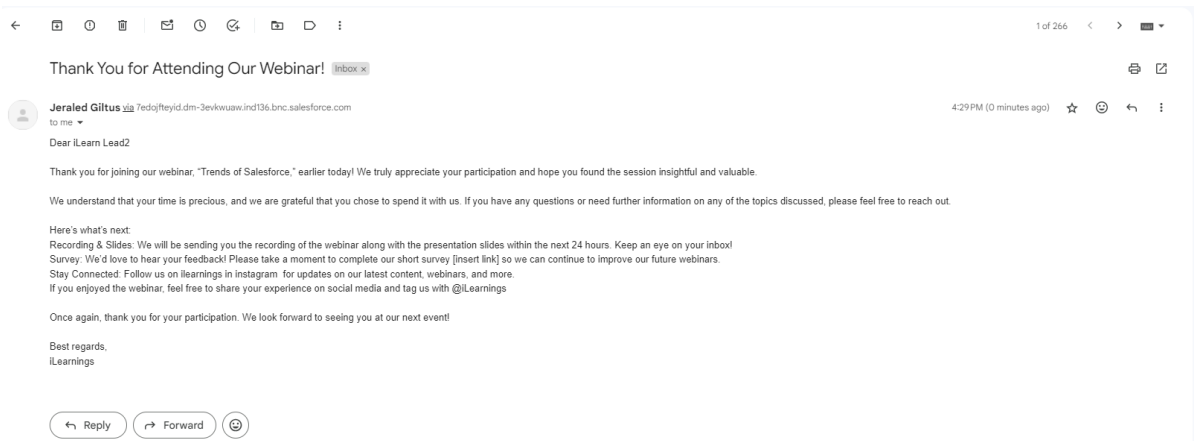
3.6 Flow 5 (Six Hours After Send Email to Campaign Members)

◇ For this flow, I have created an custom field on campaign members and when the member is inserted the the field is automatically is filled from campaign object field(webinar end date and time) using Apex trigger I have done.

◇ As same as , when the webinar end date and time is updated in campaign object the custom field in campaign member object also updated, I can done this with the help of Apex trigger.

◇ Then in flow I have used record-triggered flow and I have used scheduled path to trigger an email to campaign members one hour after.

Template :

Flow :

← ⇶ Flow Builder   Email alert after 6 Hrs - V1   ? ▾

↺ ↻ 🗇 ⚙   Free-Form ▾   Version 1: Last modified an hour ago Active Run Debug View Tests Deactivate Save As Save

Toolbox

Elements   Manager

∨ Interaction (3)
  ⬜ Action
  ⇶ Subflow
  ⊘ Custom Error

∨ Logic (6)
  ▦ Assignment
  ⬥ Decision
  ↻ Loop
  ⇶ Transform
  ⇅ Collection Sort
  ⛃ Collection Filter

∨ Data (4)
  ▣ Create Records
  ▣ Update Records
  ▣ Get Records
  ▣ Delete Records

▶
Start
Record-Triggered Flow

Object: **Campaign Member**   Edit
Trigger: **A record is created or updated**
Conditions: **2**
Optimize for: **Actions and Related Records**

Scheduled Paths: **2**   Edit

⌕ Open Flow Trigger Explorer for Campaig...

〔Email alert after 6 Hours〕

✉
Email Alert
Email Alert after 6 hrs

Result :

We Value Your Input! Share Your Feedback on "Trends of Salesforce" Webinar [Spam ×]   🖨 ↗

⊙ **Jeraled Giltus** via h2c1yOz4gahx62.dm-3evkwuaw.ind136.bnc.salesforce.com   4:42 PM (0 minutes ago) ☆ ☺ ↩ ⋮
   to me ▾

Why is this message in spam? It is similar to messages that were identified as spam in the past.

[Report not spam]   ⓘ

Dear iLearn

I hope this email finds you well.

As a valued participant in our recent session on "Trends of Salesforce," we are eager to hear your thoughts and insights. Your feedback is crucial in helping us enhance the quality and relevance of our content, and we would greatly appreciate a few moments of your time to complete a brief survey.

FeedBackForm URL : https://shorturl.at/rzIxy

Your responses will provide valuable feedback on:

The relevance and clarity of the trends discussed.
Your interest in the topics covered.
Suggestions for future sessions and content.
The survey should take no more than 5 minutes to complete. Your responses are anonymous and will be used solely to improve our future offerings.

Thank you for your participation and support. We look forward to your feedback!

Best regards,
iLearnings Team

Webinar Feedback

First Name
[   ]

Last Name
[   ]

Email
[   ]

Company
[   ]

City
[   ]

State/Province
[   ]

How would you rate the webinar?
| 1 | 2 | 3 | 4 | 5 |

What was your favorite part of the webinar?
[   ]

Would you recommend this webinar to a colleague?
○ Yes
○ No

Which topics would you like to see in future webinars?
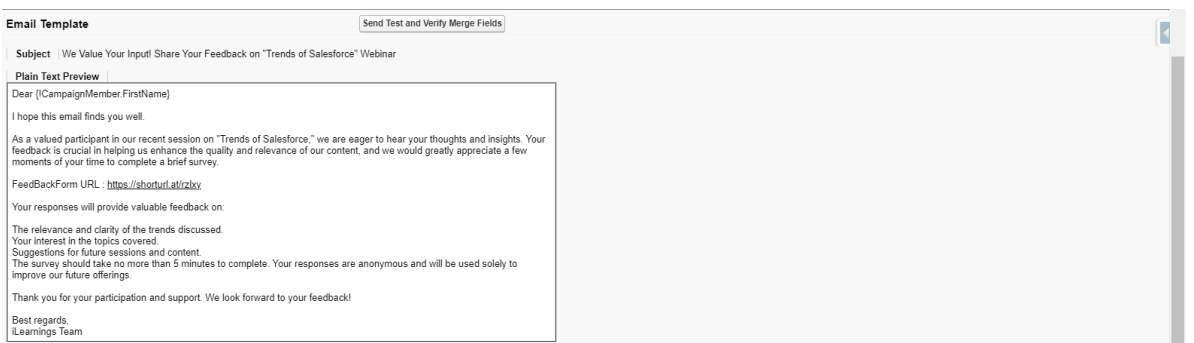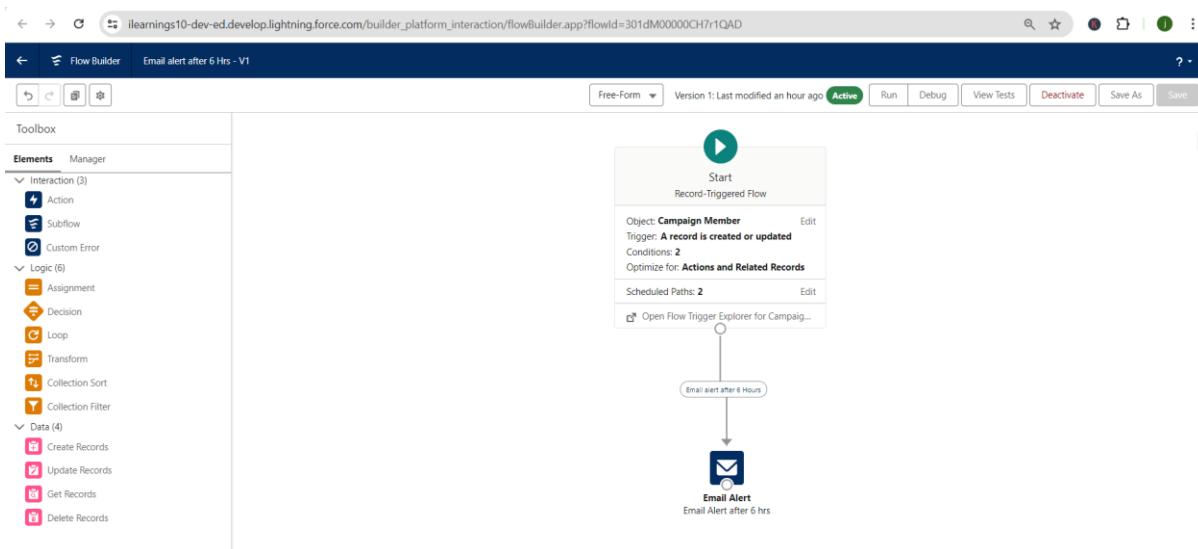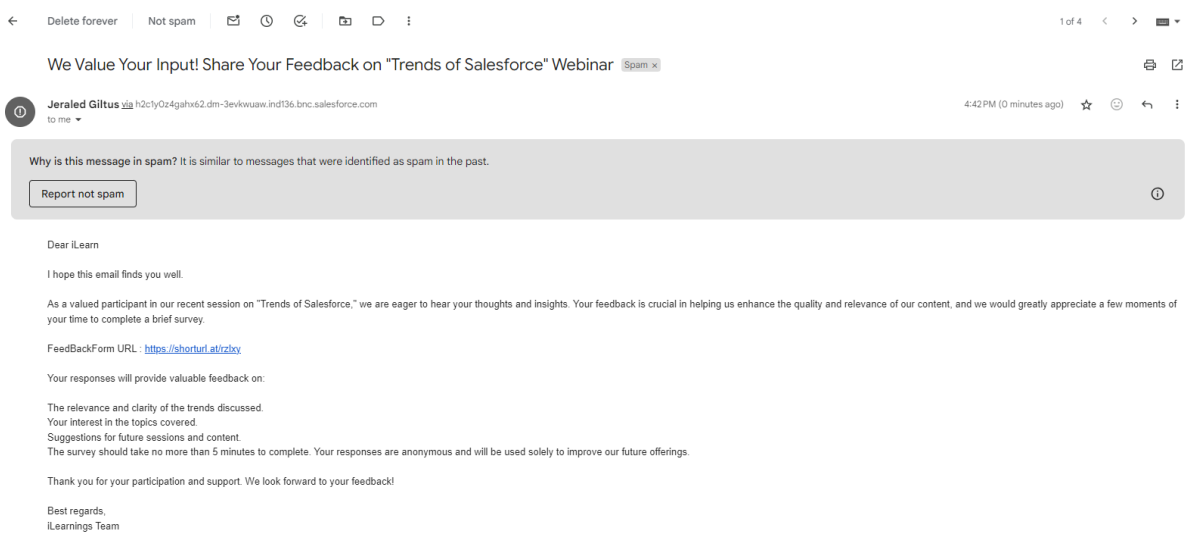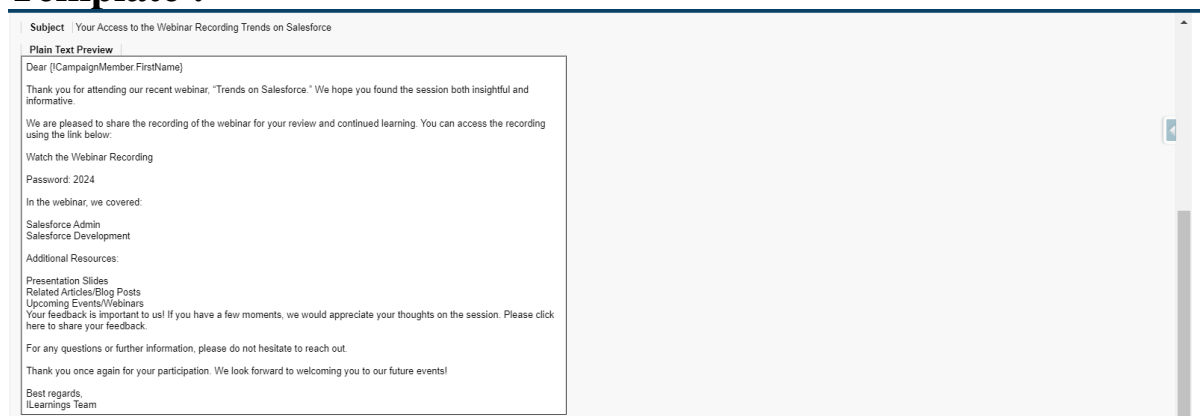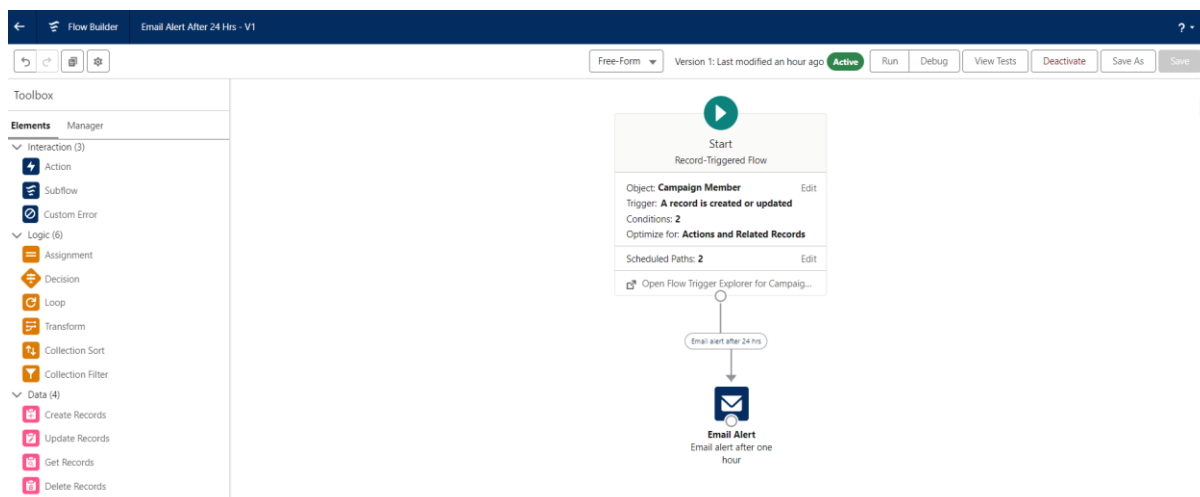[   ]

[Submit Feedback   ]

3.7 Flow 6 (24 Hours After Send Email to Campaign Members)

✧ For this flow, I have created an custom field on campaign members and when the member is inserted the the field is automatically is filled from campaign object field(webinar end date and time) using Apex trigger I have done.

✧ As same as , when the webinar end date and time is updated in campaign object the custom field in campaign member object also updated, I can done this with the help of Apex trigger.

✧ Then in flow I have used record-triggered flow and I have used scheduled path to trigger an email to campaign members 24 hours after.
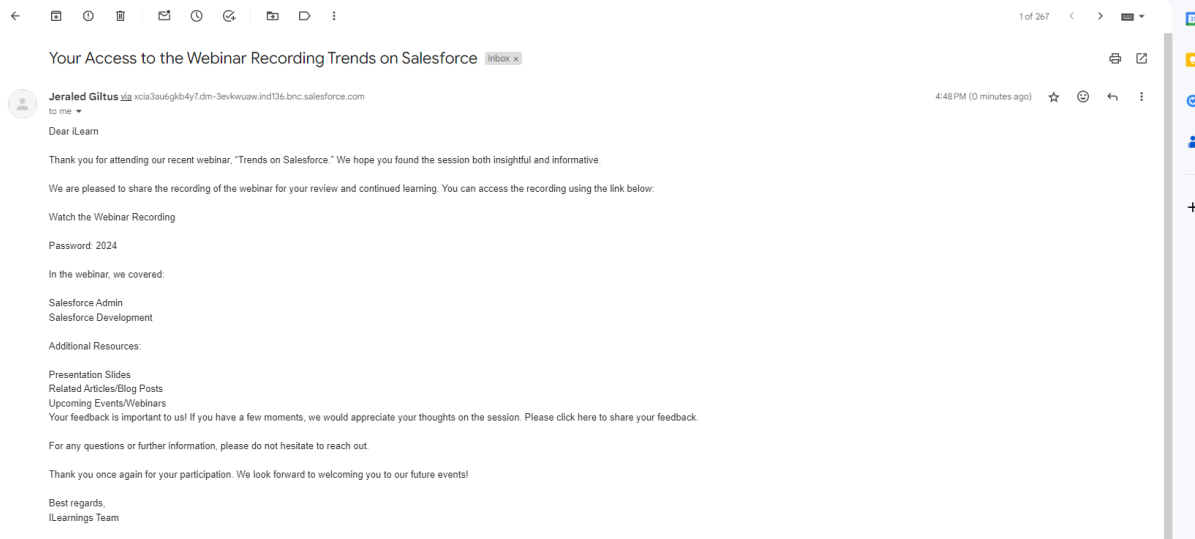
Template :

Flow :

Result :

Your Access to the Webinar Recording Trends on Salesforce Inbox ×

Jeraled Giltus via xcia3au6gkb4y7.dm-3evkwuaw.ind136.bnc.salesforce.com

to me

4:48 PM (0 minutes ago)

Dear iLearn

Thank you for attending our recent webinar, "Trends on Salesforce." We hope you found the session both insightful and informative.

We are pleased to share the recording of the webinar for your review and continued learning. You can access the recording using the link below:

Watch the Webinar Recording

Password: 2024

In the webinar, we covered:

Salesforce Admin
Salesforce Development

Additional Resources:

Presentation Slides
Related Articles/Blog Posts
Upcoming Events/Webinars
Your feedback is important to us! If you have a few moments, we would appreciate your thoughts on the session. Please click here to share your feedback.

For any questions or further information, please do not hesitate to reach out.

Thank you once again for your participation. We look forward to welcoming you to our future events!

Best regards,
ILearnings Team

4. Validation Rule :

➤ Validation rules in Salesforce are used to ensure data integrity by verifying that the data entered into a record meets specific criteria before it is saved.

➤ These rules help maintain data quality by preventing users from entering incorrect or inconsistent data.

Key Components of Validation Rules

Error Condition Formula:

- ✓ A formula that evaluates to TRUE or FALSE.
- ✓ If the formula evaluates to TRUE, the validation rule triggers and the record is not saved.

Error Message:

- ✓ A message that displays to the user when the validation rule condition is met (i.e., the formula evaluates to TRUE).
- ✓ This message should clearly explain what went wrong and how to correct it.

4.1 Validation in Lead Object :

➤ In Lead Object, there is an picklist filed named as Registered or not , if the value is Registered Success then make Reg.Date ,Fees paid by candidate and batch start date as required ,I have done this with the help of validation rule.

```
AND(
ISPICKVAL( Registration_Successful__c , "Yes"),
OR(ISBLANK(Registration_Date__c ),ISBLANK( Fees_Paid_By_Customer__c
```

), ISBLANK(Batch_Start_Date__c)))

iLearnings   Home   Leads ⌄   Campaigns ⌄   Employees ⌄   Trainers ⌄

🔍 Search...

Lead
Mr. ILearn Lead1

+ Follow   New Case   New Note   Submit for Approval   ⌄

Batch Start Date

[   ] 📅

Pending Fees

₹0.00
This field is calculated upon save

Registration Successful   ↩

[Yes   ⌄]

If Registration is Successful then Reg Date , Fees Paid By Customer , Batch start date is
Manadatory

Send Offer Letter ⓘ
☐

Address
Street

[   ]

City

[   ]

Zip/Postal Code   State/Province

[   ]

Country

[   ]

⊘ We hit a snag.   ✕

Review the following fields
• Registration Successful