Salesforce Implementation for Ed-tech Industry

PROJECT REPORT
Week 1

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.

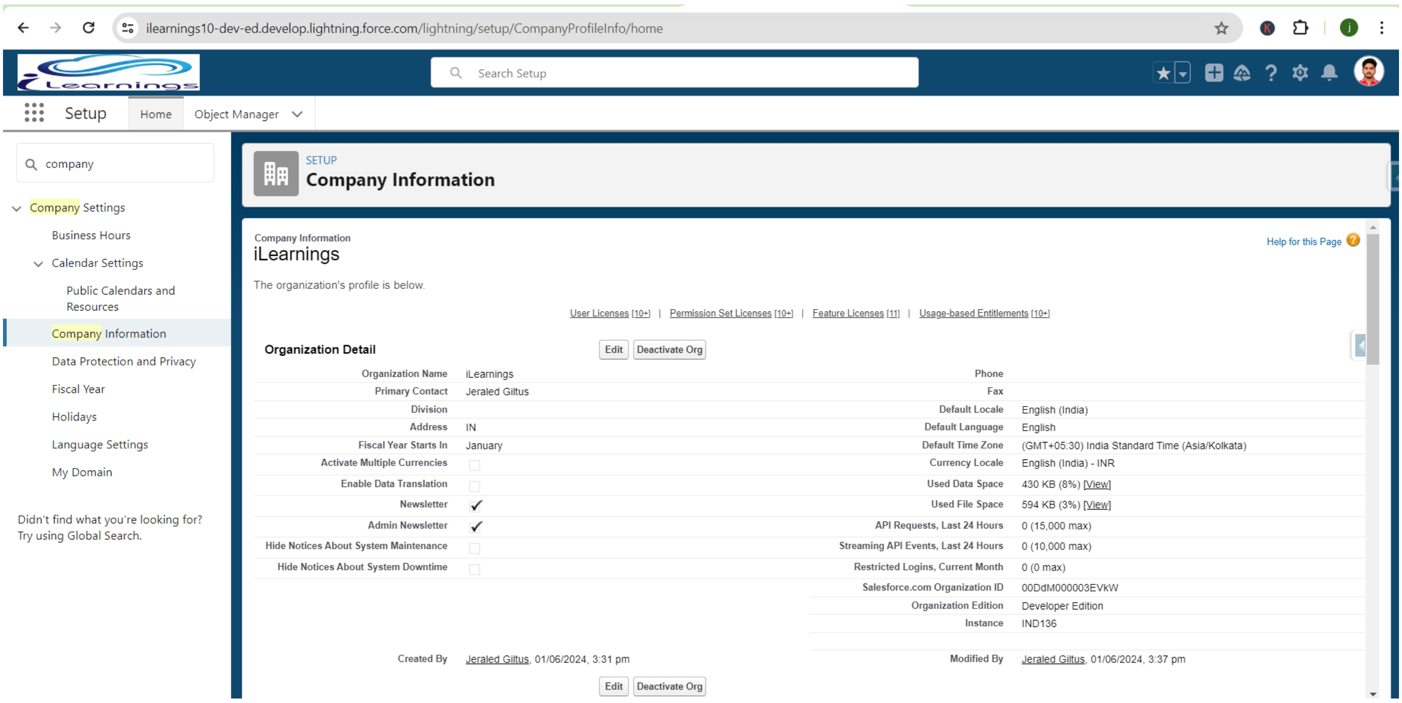
1. Week 1 Summary

- During the first week of my internship, I focused on setting up the Salesforce Org and beginning the initial customization tasks.
- This involved configuring the environment to align with the project's branding requirements and creating foundational custom objects necessary for our application. Below are the detailed activities and achievements of the week:

2. Salesforce Org Setup

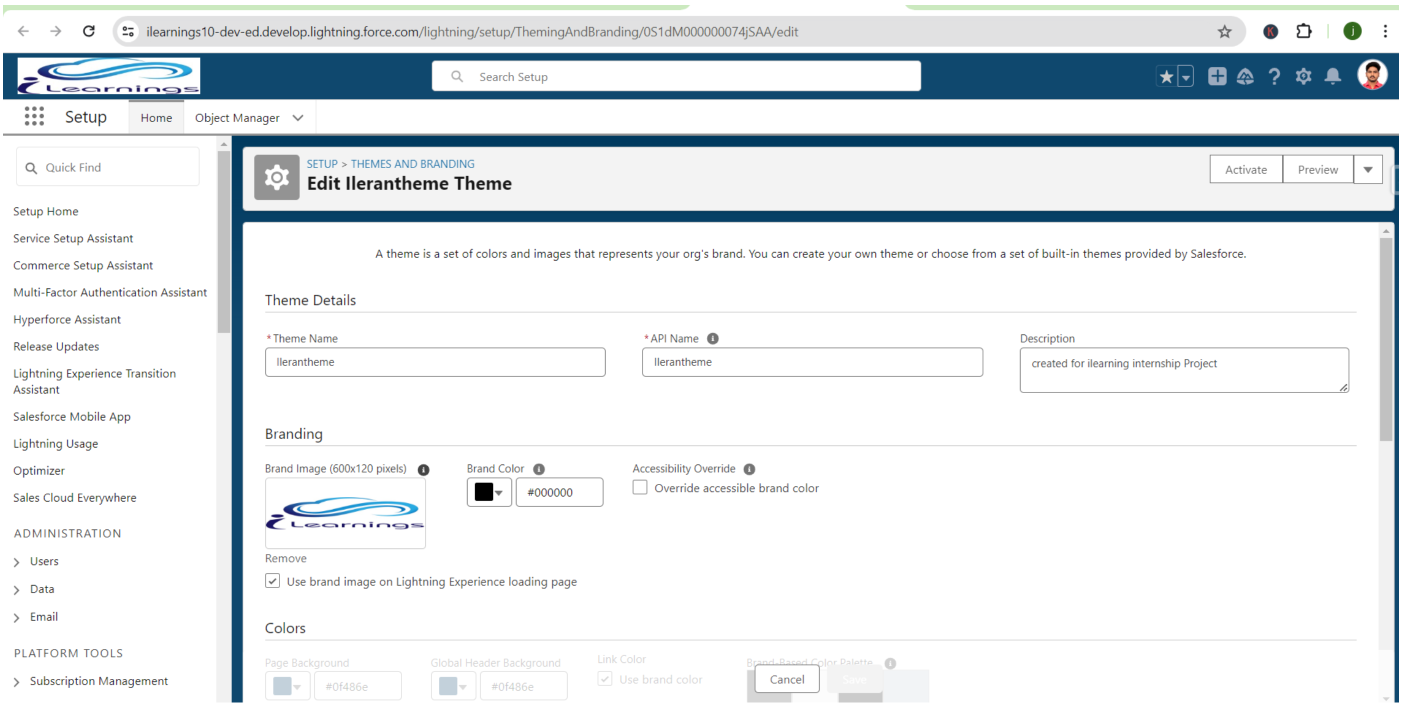
- Successfully created a new Salesforce Organization to serve as the base environment for our project.
- Successfully created an Salesforce org for our project using this link https://developer.salesforce.com/signup

Org Details:



Theme and Branding:

- Uploaded the company logo to personalize the Salesforce Org.
- This helps in reinforcing the brand identity and provides a familiar interface for users.
- The logo appears on the main dashboard and various key sections, ensuring consistent branding across the platform.
- Applied the corporate color scheme throughout the Salesforce Org.
- This includes setting primary and secondary colors that match the company's branding guidelines.
- The use of consistent colors enhances the visual appeal and user experience, making the interface more engaging and aligned with the company's brand aesthetics.



2.1. Project Work:

2.2. Custom Object Development:

- Developed two custom objects, “**Trainee**” and “**Employee**”, essential for our project.

3.2.1. Trainee Object:

Fields Created:

1. Trainer Name : Name for unique trainee identification.
2. Trainer Email : Email field for contact information.
3. Trainer Phone Number : Phone number field.
4. Address : Text area field.
5. Specialization : Text area field.
6. Current Course Assigned : Text field.
7. Birth Date : Date field.
8. Joining Date : Date field.

3.2.2. Employee Object:

Fields Created:

1. Employee Name : Name for unique employee identification.
2. Designation : Text field.
3. Salary : Currency field.
4. Birth Date : Date field.
5. Joining Date : Date field.
6. Employee Email : Email field for contact information.
7. Active : Checkbox field.
8. Last Working Date : Date field

3. Custom Fields on Standard Objects:

3.1. Lead Object

Fields Created :

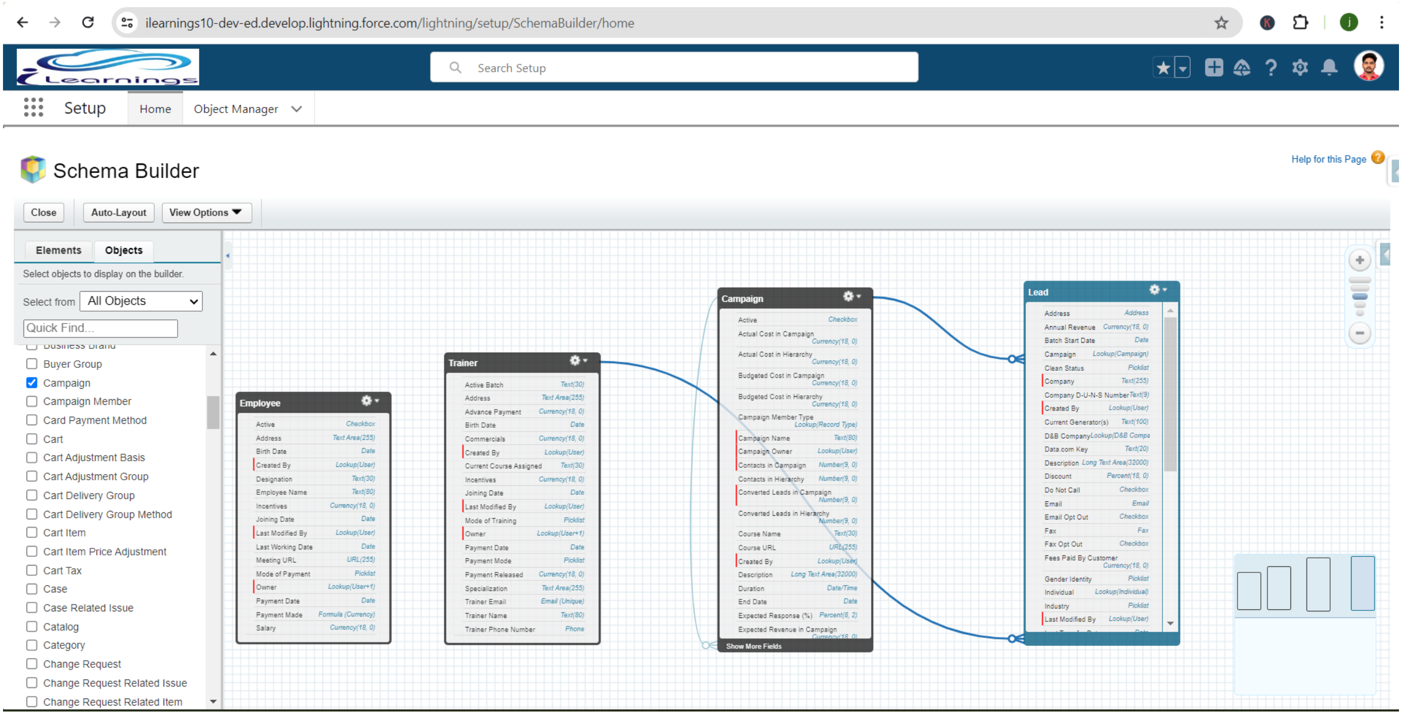
1. Trainer : Lookup field to trainee object.
2. Registration Date : Date field.
3. Total fees : Currency field.
4. Discount : Percent field.
5. Fees Paid by Candidate : Currency field.
6. Pending Fees : Formula field calculated by Total fees - Fees Paid by Candidate.
7. Batch Start Date : Date field.
8. Registration Successful ? : Pick-list field.

3.2. Campaign Object

Fields Created :

1. Webinar Start Date & Time : Date Time field.
2. Webinar End Date & Time : Date Time field.
3. Duration : Number field.
4. Perks : Text area field.
5. Course Link : URL field.

Schema Builder:



5. Data Management:

5.1. Tool used for data import:

- To ensure a seamless transition of data into the Salesforce Org, I utilized Salesforce's Data Loader tool.
- This powerful application facilitates the import, export, and management of large datasets efficiently.
- By leveraging Data Loader, I was able to handle substantial volumes of data without compromising on accuracy or integrity.

Benefits of Data Loader:

- Data Loader facilitated the quick and efficient migration of large datasets, saving significant time and effort compared to manual data entry.
- The tool's robust data validation and error-handling features ensured high accuracy and minimized the risk of data corruption.

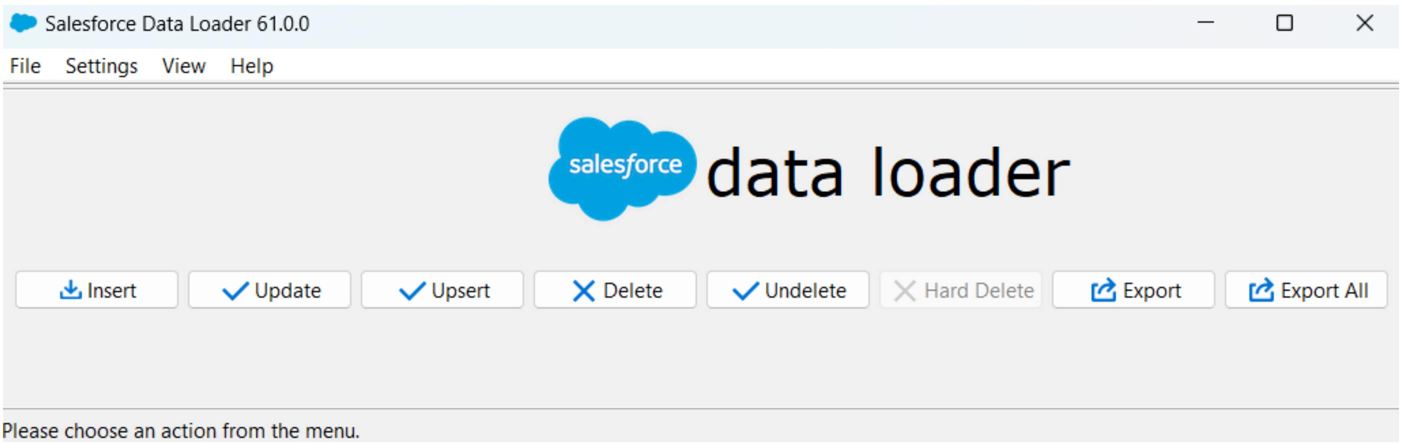
- Data Loader's capability to handle extensive data volumes made it an ideal choice for importing employee and trainee records, supporting the scalability needs of the project.
- The ability to schedule data loads and automate processes added flexibility, enabling continuous data updates and synchronization as required.

5.2 Web - to - Lead Form:

- To enhance lead generation capabilities, I developed a Web-to-Lead form using Salesforce's built-in functionality.
- This form is designed to capture essential lead information directly from our website, streamlining the process of acquiring new leads and ensuring that they are automatically entered into the Salesforce Org for efficient follow-up.

Deployment Using GitHub Pages:

- Uploaded the Web-to-Lead form to a GitHub repository and deployed it to GitHub Pages. This approach provides a reliable and cost-effective way to host the form on a live server, making it accessible to users.
- Created a new GitHub repository and committed the Web-to-Lead form files, including the HTML, CSS, and any associated assets.
- GitHub Pages automatically generated a URL for the live form, which can be



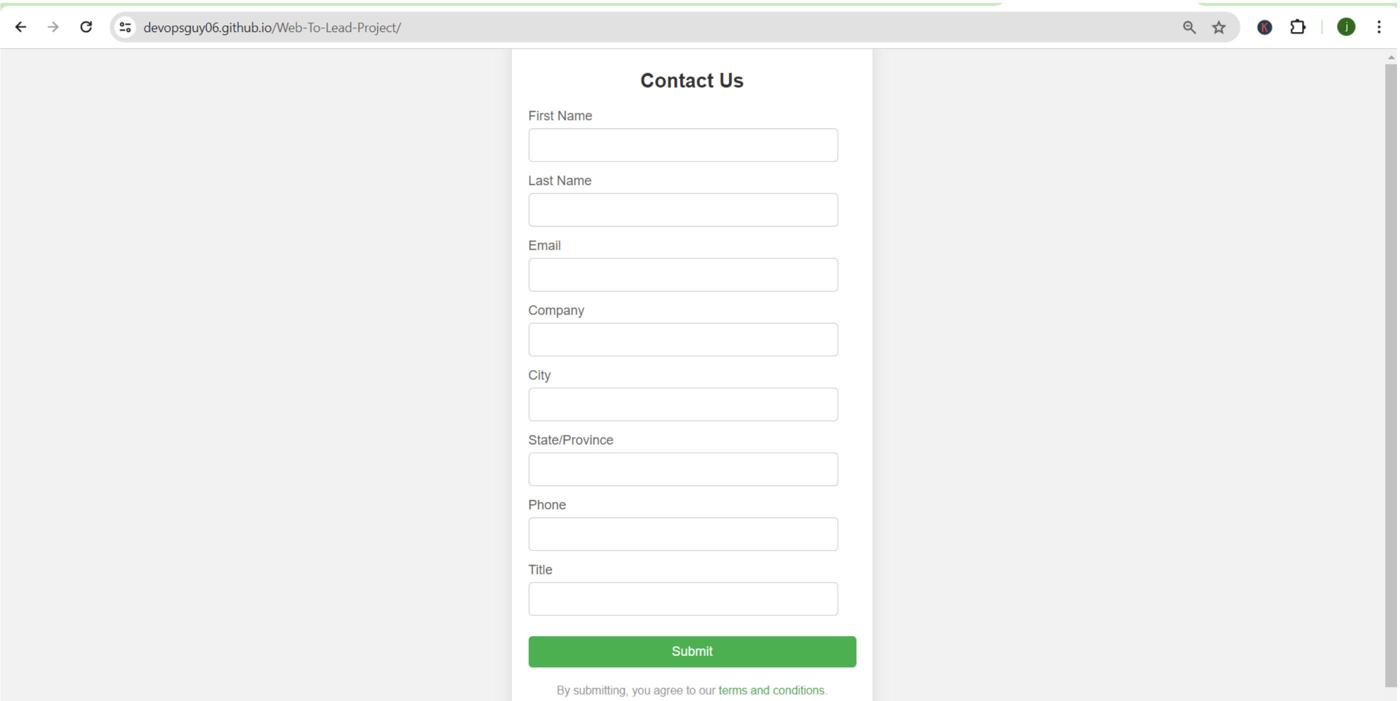
shared and embedded on the company's website for immediate use.

Benefits of Web-to-Lead Form:

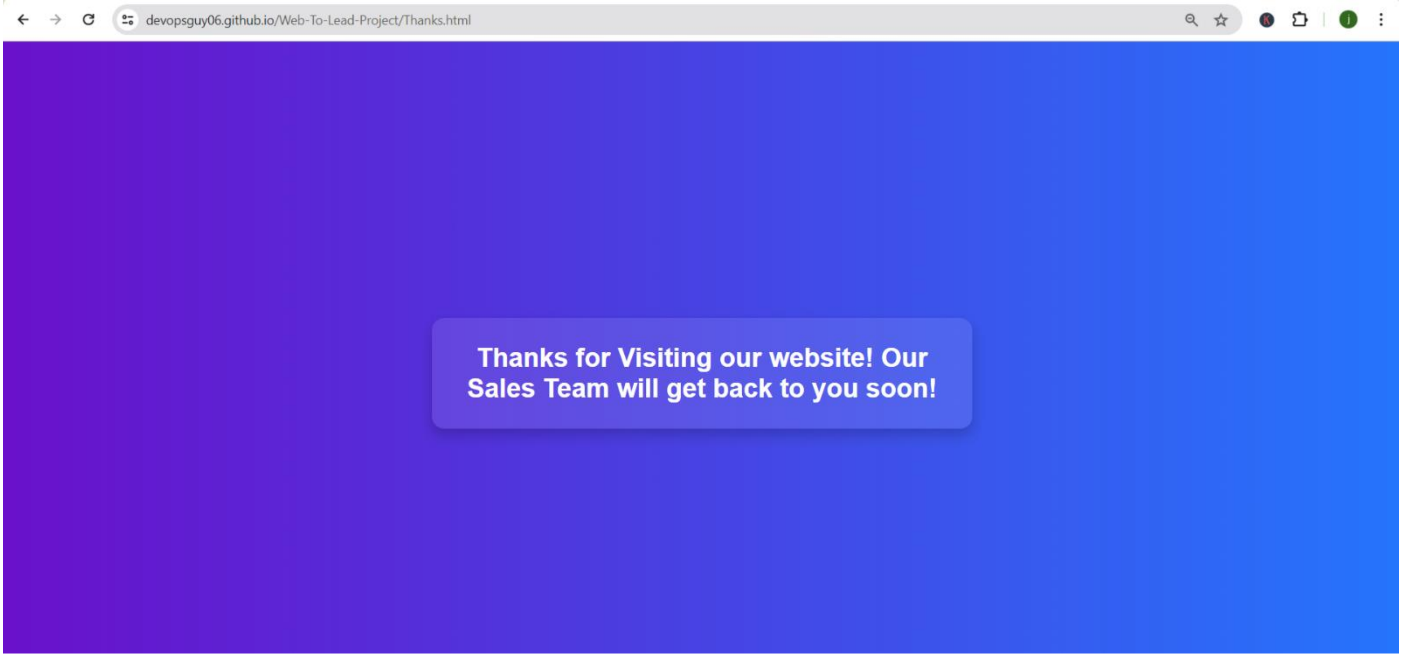
- The Web-to-Lead form automates the process of capturing and entering lead information into Salesforce, reducing manual data entry and increasing efficiency.
- By integrating the form directly with Salesforce, leads are instantly available for follow-up, improving response times and enhancing lead management.
- Using GitHub Pages for deployment provides a free and reliable hosting solution, ensuring that the form is always available to users without additional hosting costs.

Web-to-Lead form link : https://devopsguy06.github.io/Web-To-Lead-Project/

- In this form, I have made Lead Source field as hidden and default value as 'Web'.



➢ On after clicking submit I have created an HTML page to show Thank you page.



7. <u>Automation:</u>

7.1. <u>Lead Assignment Rule:</u>

➢ **Automated Lead Distribution:** The Lead Assignment Rule automates the process of assigning incoming leads to the most appropriate sales representatives or teams based on predefined criteria such as geographic location, lead source, industry, and product interest. This automation ensures that leads are promptly and accurately routed to the right individuals, reducing manual effort and improving efficiency in lead management.

➢ **Criteria-Based Assignment:** By defining specific criteria for lead assignment, such as geographic region, lead source, and industry, the rule ensures that leads are distributed strategically to sales representatives with relevant expertise and experience. This criteria-based approach optimizes lead distribution, improves response times, and enhances the likelihood of successful lead conversion by matching leads with the most suitable representatives.

- **Enhanced Sales Performance:** Implementing a robust Lead Assignment Rule leads to improved sales performance by streamlining lead distribution processes, increasing responsiveness to leads, and balancing the workload among sales representatives. With leads assigned more efficiently, sales teams can focus their efforts on engaging with leads that are most likely to convert, resulting in higher conversion rates, better customer satisfaction, and ultimately, increased revenue for the organization.

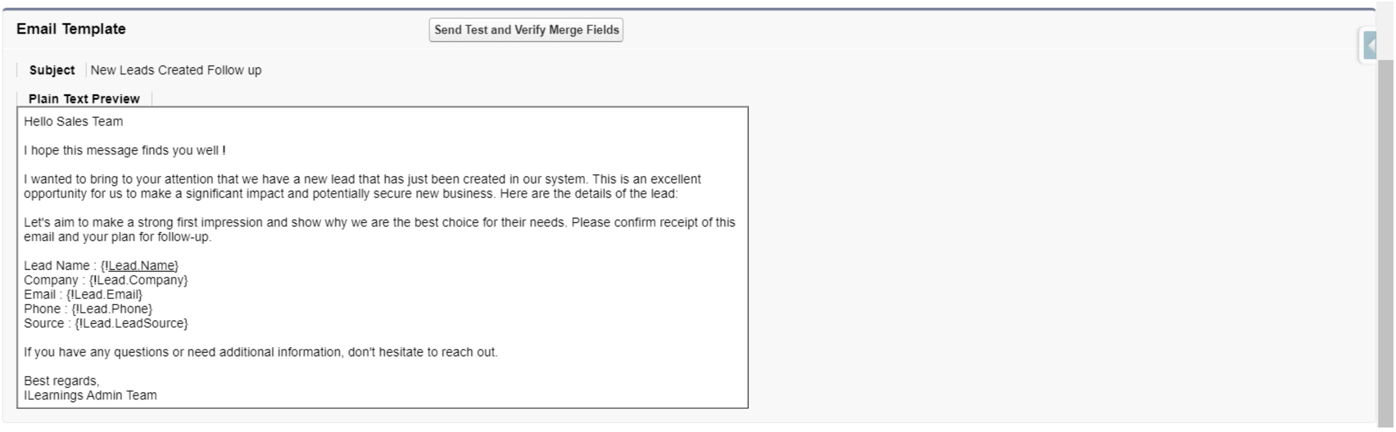
Benefits of Lead Assignment Rule:

- Automates the lead distribution process, reducing manual effort and ensuring leads are quickly routed to the right representatives.
- By assigning leads based on specific criteria, the rule ensures that leads are handled by representatives best equipped to address their needs, improving response times and customer satisfaction.
- Helps in balancing the workload among sales representatives by distributing leads evenly and according to predefined criteria.

Assign to Sales Team :

- In this, I have implemented an lead assignment rule when an web to lead to form is filled and I have set criteria as Lead Source equals Web assign to Sales Team.
- For Sales Team, I have created an queues to add users and name it has Sales team.
- Then I have created an template to send email to the sales team.

Template :


Email Template
Send Test and Verify Merge Fields
Subject New Leads Created Follow up
Plain Text Preview

Hello Sales Team

I hope this message finds you well !

I wanted to bring to your attention that we have a new lead that has just been created in our system. This is an excellent opportunity for us to make a significant impact and potentially secure new business. Here are the details of the lead:

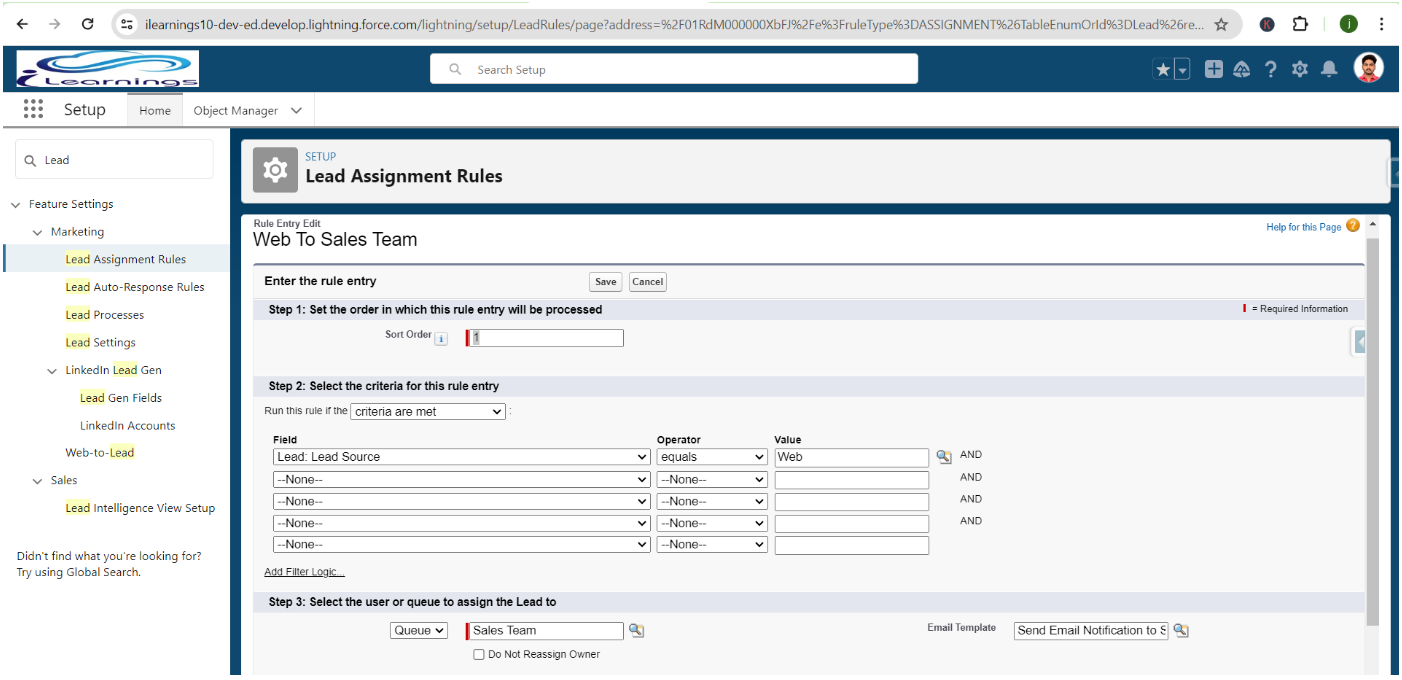
Let's aim to make a strong first impression and show why we are the best choice for their needs. Please confirm receipt of this email and your plan for follow-up.

Lead Name : {!Lead.Name}
Company : {!Lead.Company}
Email : {!Lead.Email}
Phone : {!Lead.Phone}
Source : {!Lead.LeadSource}

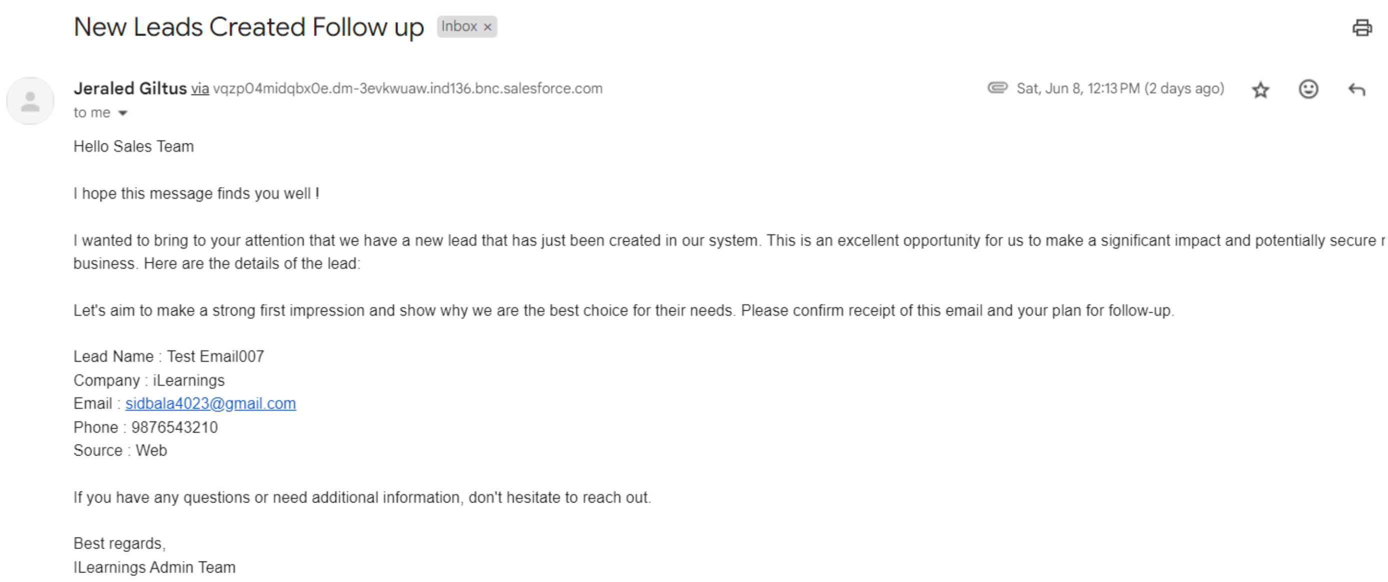
If you have any questions or need additional information, don't hesitate to reach out.

Best regards,
ILearnings Admin Team

Lead Assignment Rules :



Result :


New Leads Created Follow up Inbox ×

Jeraled Giltus via vqzp04midqbx0e.dm-3evkwuaw.ind136.bnc.salesforce.com Sat, Jun 8, 12:13 PM (2 days ago)
to me

Hello Sales Team

I hope this message finds you well !

I wanted to bring to your attention that we have a new lead that has just been created in our system. This is an excellent opportunity for us to make a significant impact and potentially secure r business. Here are the details of the lead:

Let's aim to make a strong first impression and show why we are the best choice for their needs. Please confirm receipt of this email and your plan for follow-up.

Lead Name : Test Email007
Company : iLearnings
Email : sidbala4023@gmail.com
Phone : 9876543210
Source : Web

If you have any questions or need additional information, don't hesitate to reach out.

Best regards,
ILearnings Admin Team

7.2. Salesforce Flow Builder :

- Flows automate repetitive tasks, reducing manual effort and improving efficiency.
- They streamline complex business processes, ensuring consistency and accuracy.
- Flows enhance user experience by guiding users through structured processes with clear instructions and validation.
- They integrate with external systems, allowing seamless data exchange and process orchestration.
- Flows scale with business needs, accommodating growth and evolving requirements over time.

Flow Work :

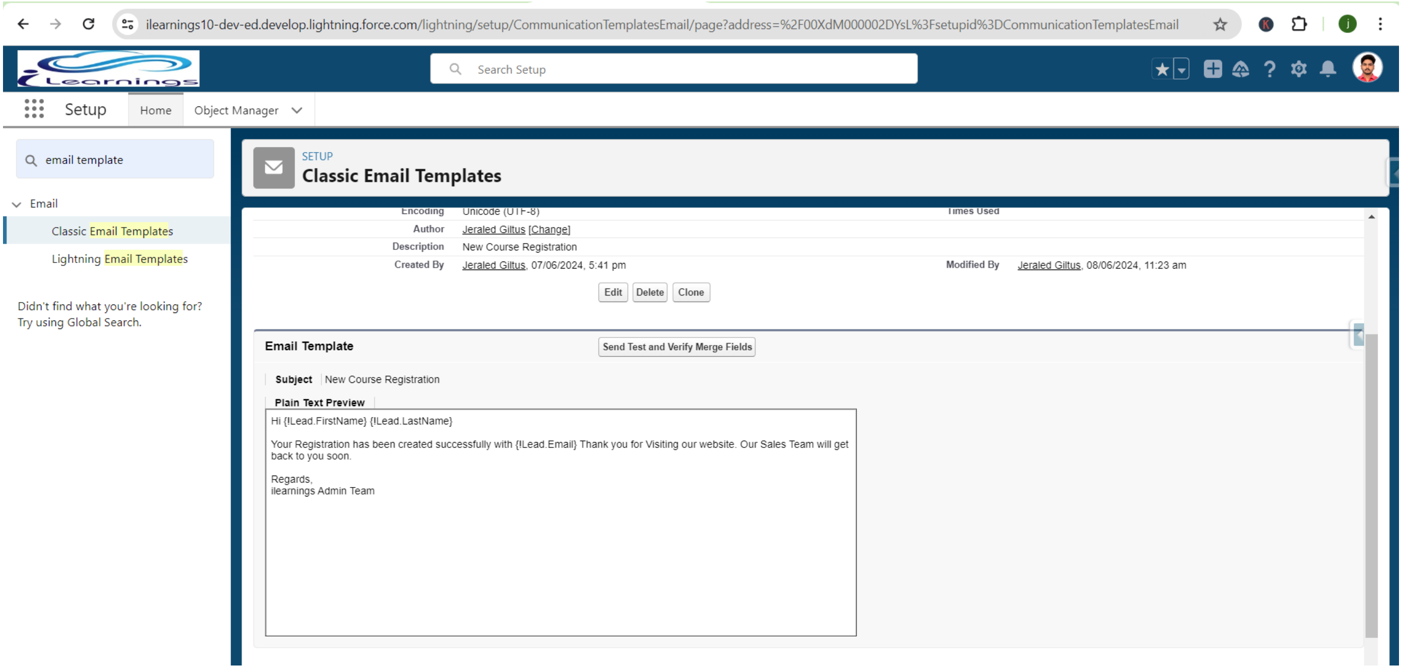
In this First week, I have developed 5 Salesforce flows.They are:

1. Send Email to Lead When Web form is filled.
2. Batch Start Date Email.
3. Send Offer Letter to Lead.
4. Trainer Birthday Email.
5. Employee Birthday Email.

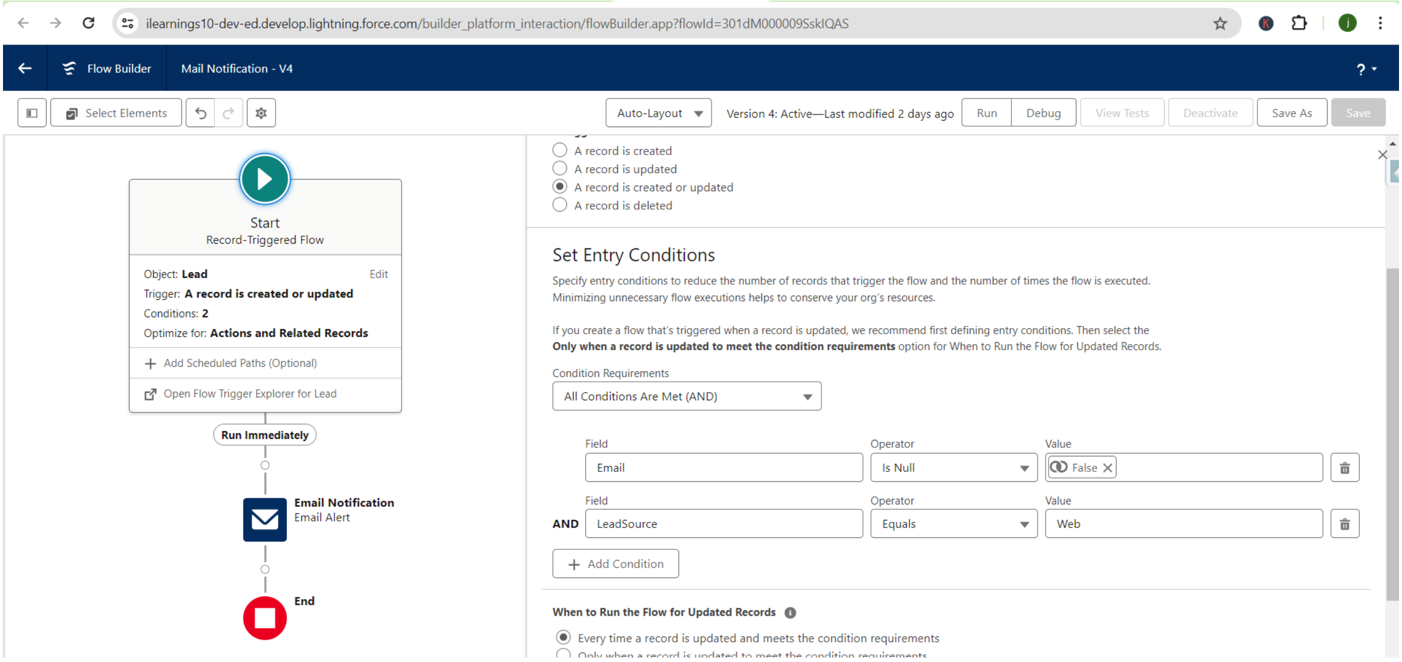
1. Send Email to Lead When Web form is filled :

- In this I have created an record-trigger flow, when an lead is created through web to lead and I have given condition Lead source equals Web the email should be triggered to the lead.
- I have created an email template then created an email alert and build the flow using flow builder.

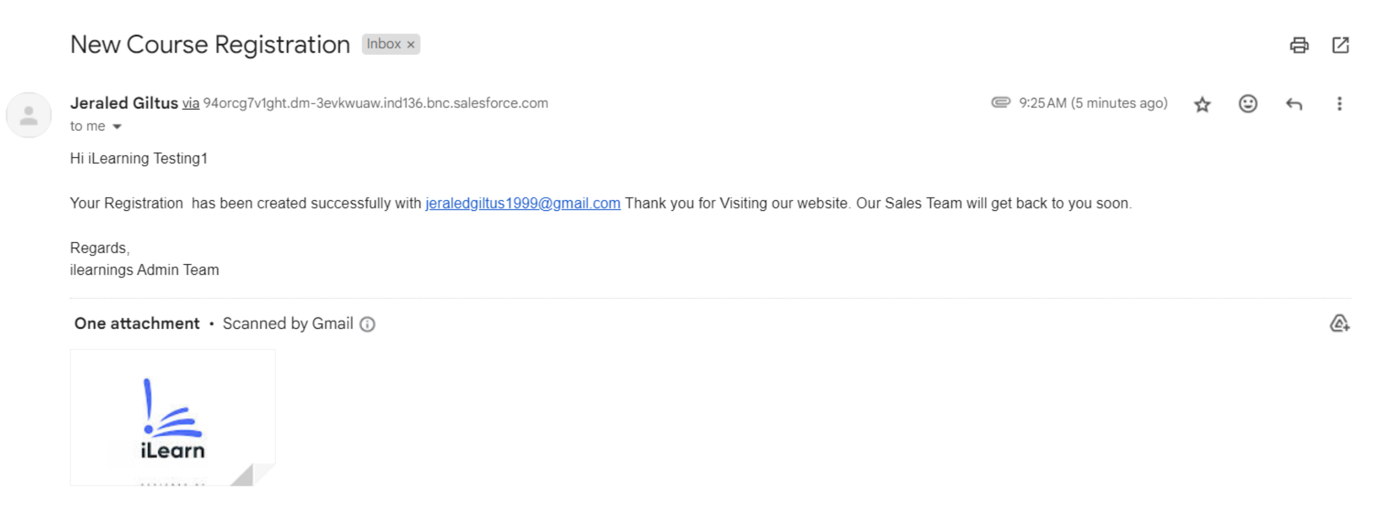
Template:



Flow:

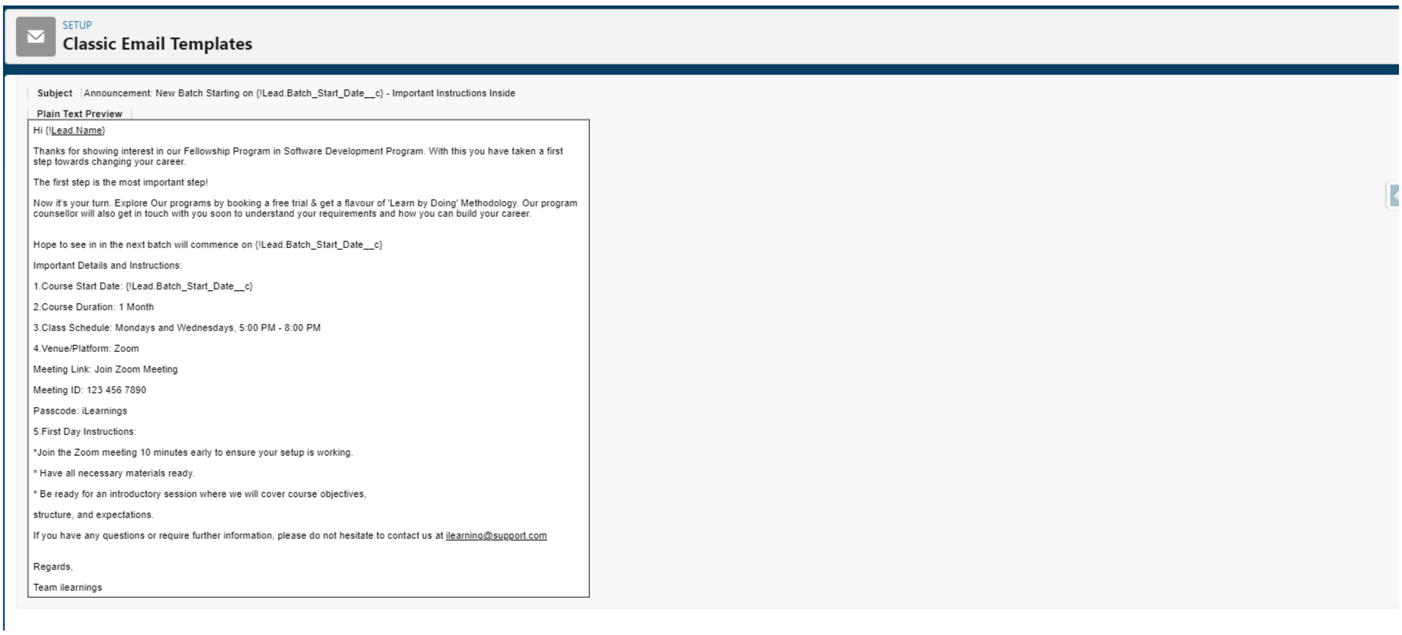

ilearnings10-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301dM000009SskIQAS
Flow Builder
Mail Notification - V4
Select Elements
Auto-Layout
Version 4: Active—Last modified 2 days ago
Run
Debug
View Tests
Deactivate
Save As
Save
Start
Record-Triggered Flow
Object: Lead
Edit
Trigger: A record is created or updated
Conditions: 2
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Lead
Run Immediately
Email Notification
Email Alert
End
A record is created
A record is updated
A record is created or updated
A record is deleted
Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the Only when a record is updated to meet the condition requirements option for When to Run the Flow for Updated Records.
Condition Requirements
All Conditions Are Met (AND)
Field
Operator
Value
Email
Is Null
False
AND
LeadSource
Equals
Web
Add Condition
When to Run the Flow for Updated Records
Every time a record is updated and meets the condition requirements

Result :



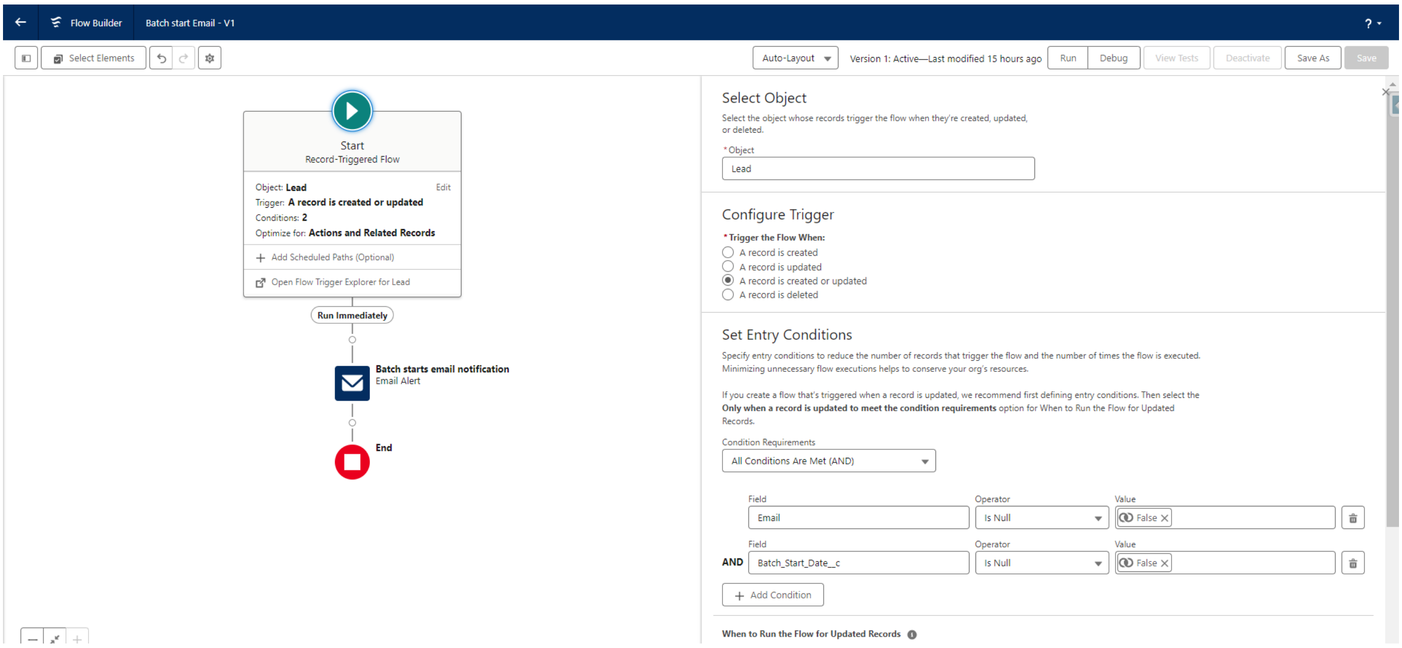
2. Batch Start Date Email :

- In this I have created an record-trigger flow, when an batch start date field in lead created or updated I have set an email should be triggered to the lead.
- I have created an email template then created an email alert and build the flow using flow builder.
- **Template :**

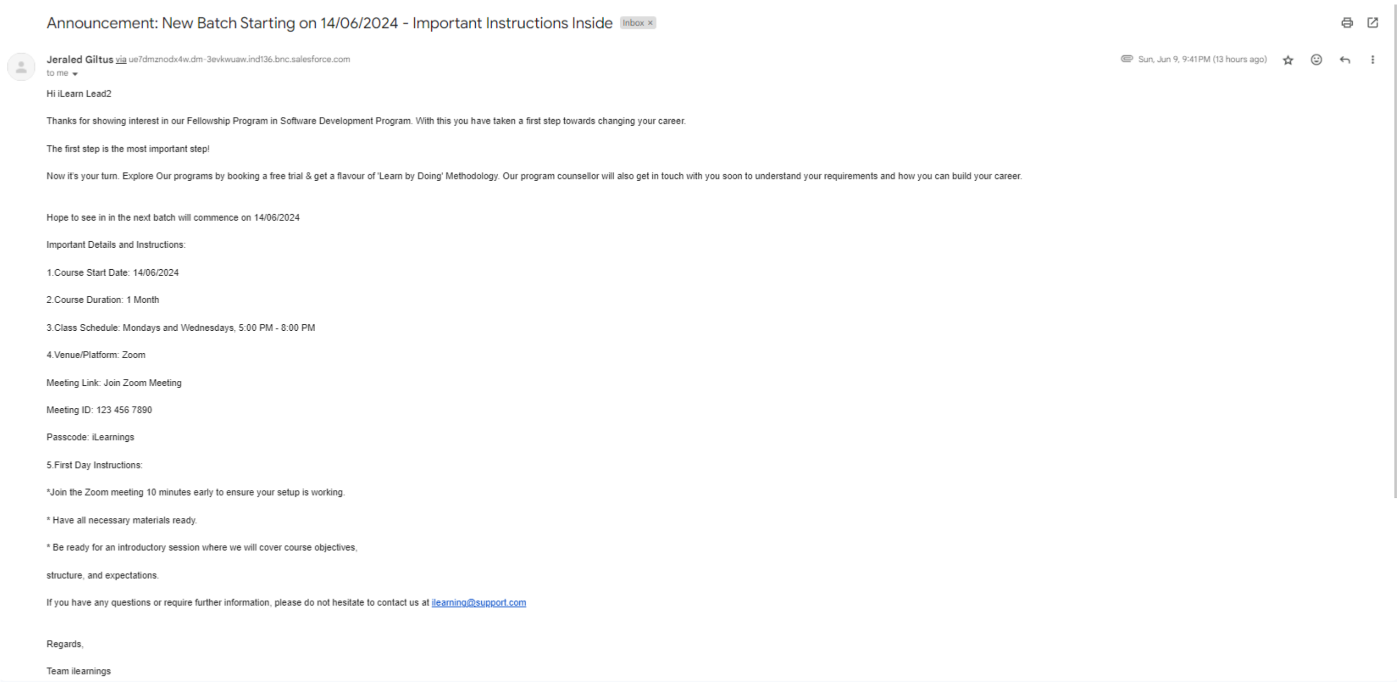


-

Flow:


Flow Builder
Batch start Email - V1
Select Elements
Auto-Layout
Version 1: Active—Last modified 15 hours ago
Run
Debug
View Tests
Deactivate
Save As
Save
Start
Record-Triggered Flow
Object: Lead
Edit
Trigger: A record is created or updated
Conditions: 2
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Lead
Run Immediately
Batch starts email notification
Email Alert
End
Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
* Object
Lead
Configure Trigger
* Trigger the Flow When:
A record is created
A record is updated
A record is created or updated
A record is deleted
Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the Only when a record is updated to meet the condition requirements option for When to Run the Flow for Updated Records.
Condition Requirements
All Conditions Are Met (AND)
Field
Operator
Value
Email
Is Null
False
AND
Batch_Start_Date__c
Is Null
False
Add Condition
When to Run the Flow for Updated Records

Result :


Announcement: New Batch Starting on 14/06/2024 - Important Instructions Inside Inbox ×

Jeraled Giltus via ue7dmznodx4w.dm-3evkwuaw.ind136.bnc.salesforce.com
to me

Sun, Jun 9, 9:41 PM (13 hours ago)

Hi iLearn Lead2

Thanks for showing interest in our Fellowship Program in Software Development Program. With this you have taken a first step towards changing your career.

The first step is the most important step!

Now it's your turn. Explore Our programs by booking a free trial & get a flavour of 'Learn by Doing' Methodology. Our program counsellor will also get in touch with you soon to understand your requirements and how you can build your career.

Hope to see in in the next batch will commence on 14/06/2024

Important Details and Instructions:

1.Course Start Date: 14/06/2024

2.Course Duration: 1 Month

3.Class Schedule: Mondays and Wednesdays, 5:00 PM - 8:00 PM

4.Venue/Platform: Zoom

Meeting Link: Join Zoom Meeting

Meeting ID: 123 456 7890

Passcode: iLearnings

5.First Day Instructions:

*Join the Zoom meeting 10 minutes early to ensure your setup is working.

* Have all necessary materials ready.

* Be ready for an introductory session where we will cover course objectives,

structure, and expectations.

If you have any questions or require further information, please do not hesitate to contact us at ilearning@support.com

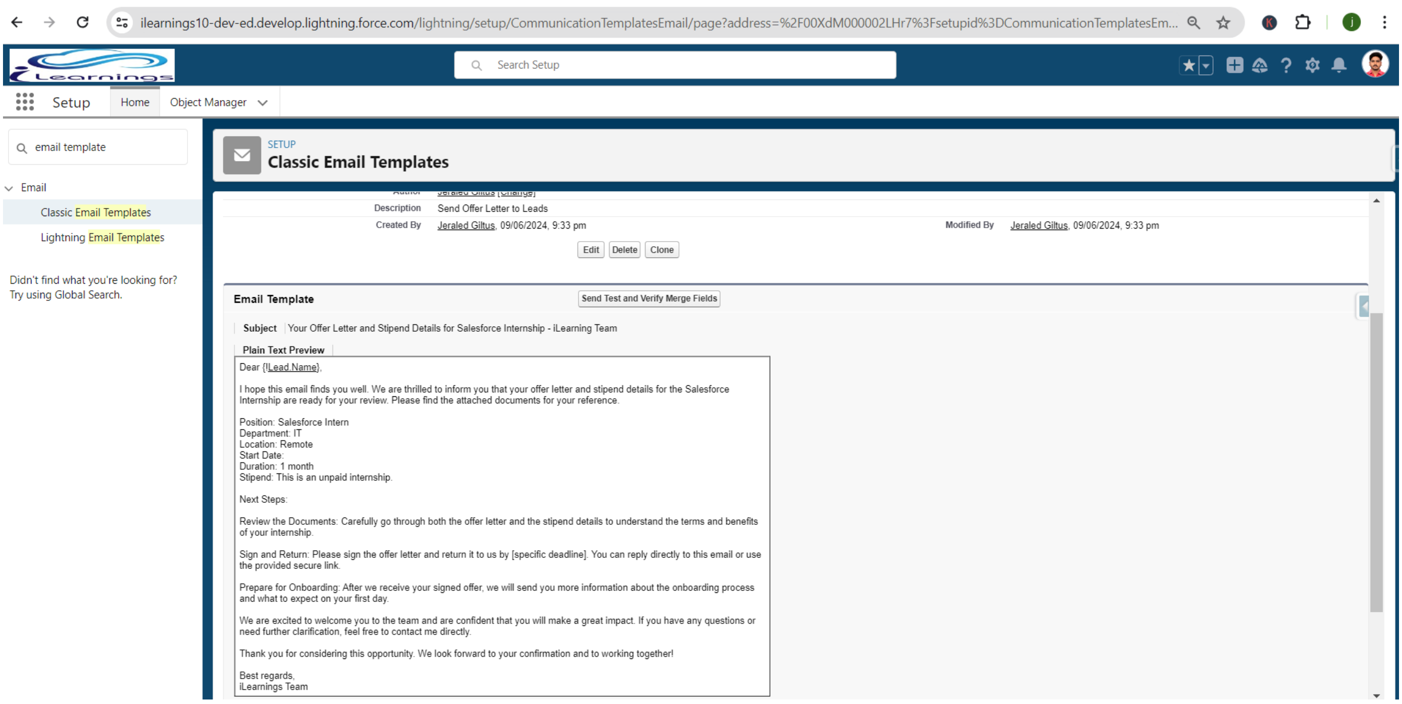
Regards,

Team ilearnings

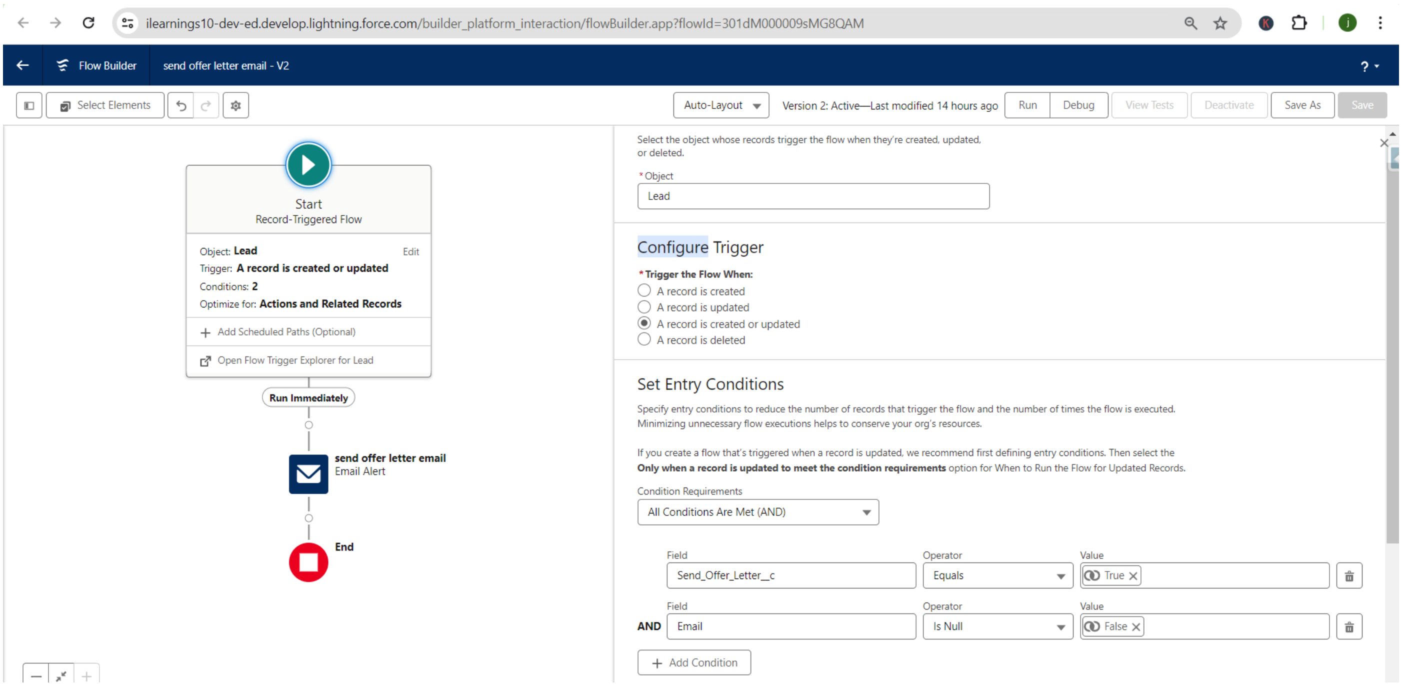
3. Send Offer Letter to Lead :

- In this I have created an record-trigger flow, I have created an custom checkbox field on lead object when an record is created or updated an email should be triggered to the lead .
- I have created an email template then created an email alert and build the flow using flow builder.

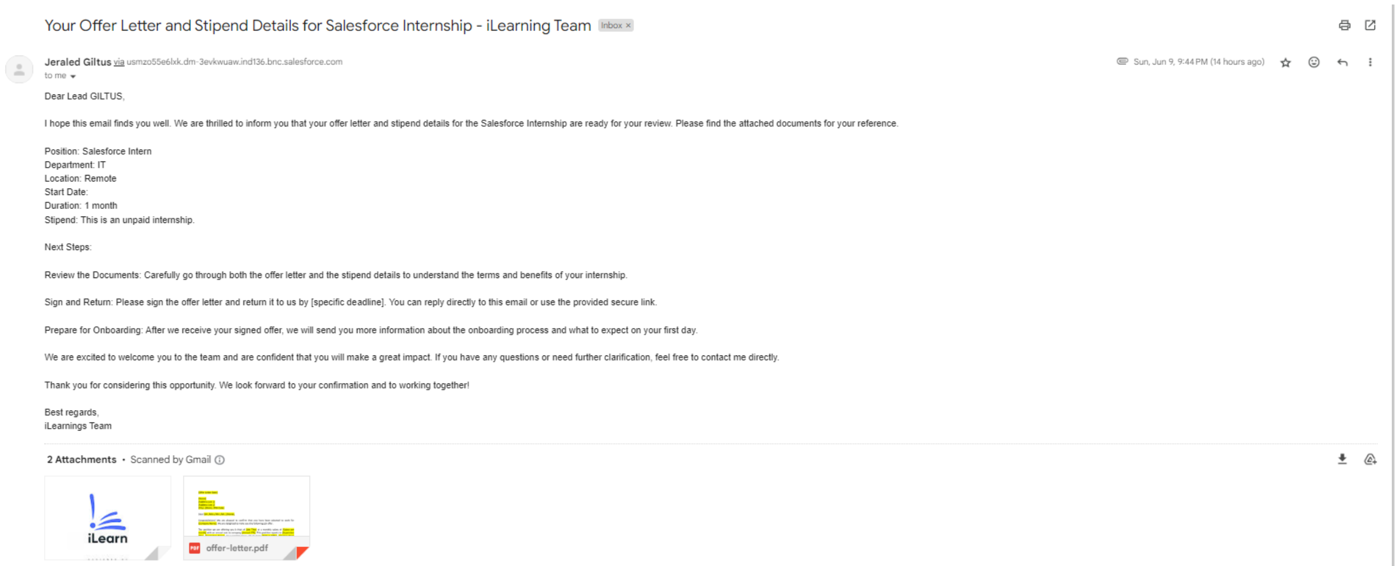
Template :



Flow :



Result :



Your Offer Letter and Stipend Details for Salesforce Internship - iLearning Team Inbox ×

Jerald Giltus via usmzo55e6lxk.dm-3evkwuaw.ind136.bnc.salesforce.com
to me

Sun, Jun 9, 9:44 PM (14 hours ago)

Dear Lead GILTUS,

I hope this email finds you well. We are thrilled to inform you that your offer letter and stipend details for the Salesforce Internship are ready for your review. Please find the attached documents for your reference.

Position: Salesforce Intern
Department: IT
Location: Remote
Start Date:
Duration: 1 month
Stipend: This is an unpaid internship.

Next Steps:

Review the Documents: Carefully go through both the offer letter and the stipend details to understand the terms and benefits of your internship.

Sign and Return: Please sign the offer letter and return it to us by [specific deadline]. You can reply directly to this email or use the provided secure link.

Prepare for Onboarding: After we receive your signed offer, we will send you more information about the onboarding process and what to expect on your first day.

We are excited to welcome you to the team and are confident that you will make a great impact. If you have any questions or need further clarification, feel free to contact me directly.

Thank you for considering this opportunity. We look forward to your confirmation and to working together!

Best regards,
iLearnings Team

2 Attachments • Scanned by Gmail

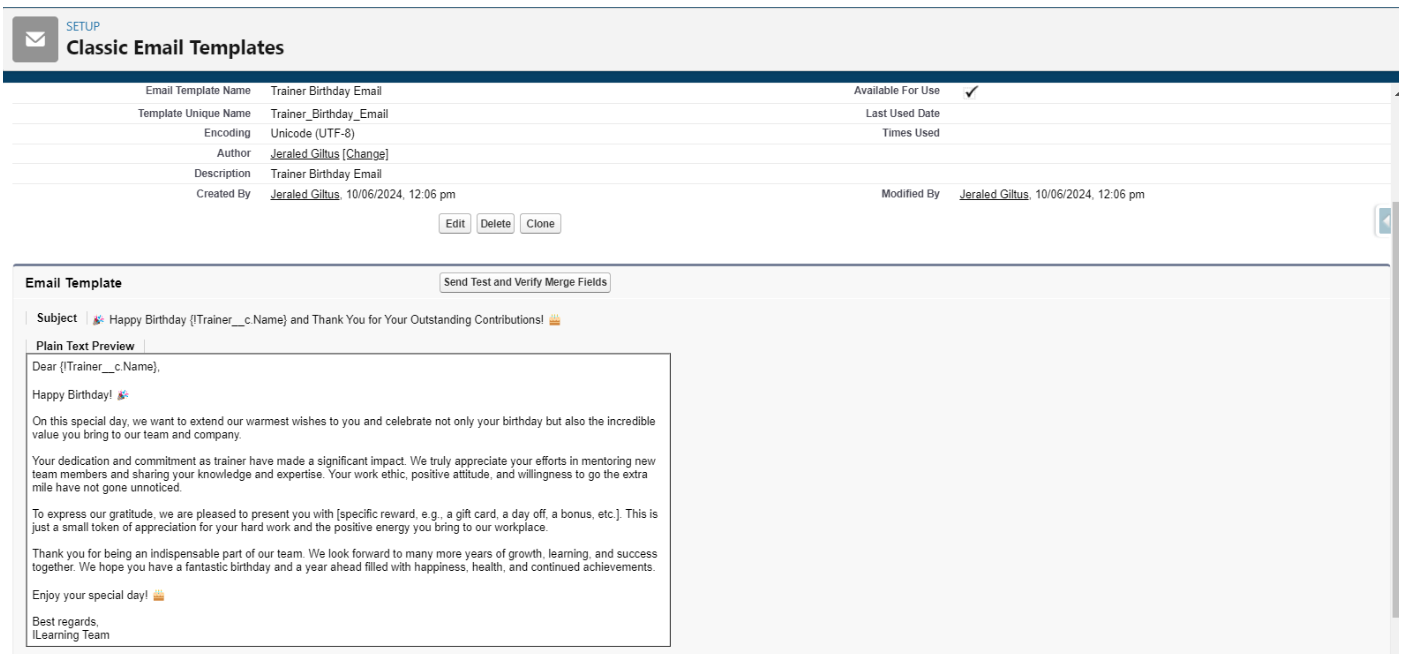
iLearn

offer-letter.pdf

4. Trainer Birthday Email :

- ➢ In this I have created an record-trigger flow, I have created an custom formula field with an formula when birth date(month,day) equals to Today(month,date) an check is checked and when the check box is updated an email should be triggered to the Trainer.
- ➢ I have created an email template then created an email alert and build the flow using flow builder.

Template :



SETUP
Classic Email Templates

Email Template Name	Trainer Birthday Email	Available For Use	✓
Template Unique Name	Trainer_Birthday_Email	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Jeraled Giltus [Change]		
Description	Trainer Birthday Email		
Created By	Jeraled Giltus, 10/06/2024, 12:06 pm	Modified By	Jeraled Giltus, 10/06/2024, 12:06 pm

Edit Delete Clone

Email Template — Send Test and Verify Merge Fields

Subject: 🎉 Happy Birthday {!Trainer__c.Name} and Thank You for Your Outstanding Contributions! 🎂

Plain Text Preview

Dear {!Trainer__c.Name},

Happy Birthday! 🎉

On this special day, we want to extend our warmest wishes to you and celebrate not only your birthday but also the incredible value you bring to our team and company.

Your dedication and commitment as trainer have made a significant impact. We truly appreciate your efforts in mentoring new team members and sharing your knowledge and expertise. Your work ethic, positive attitude, and willingness to go the extra mile have not gone unnoticed.

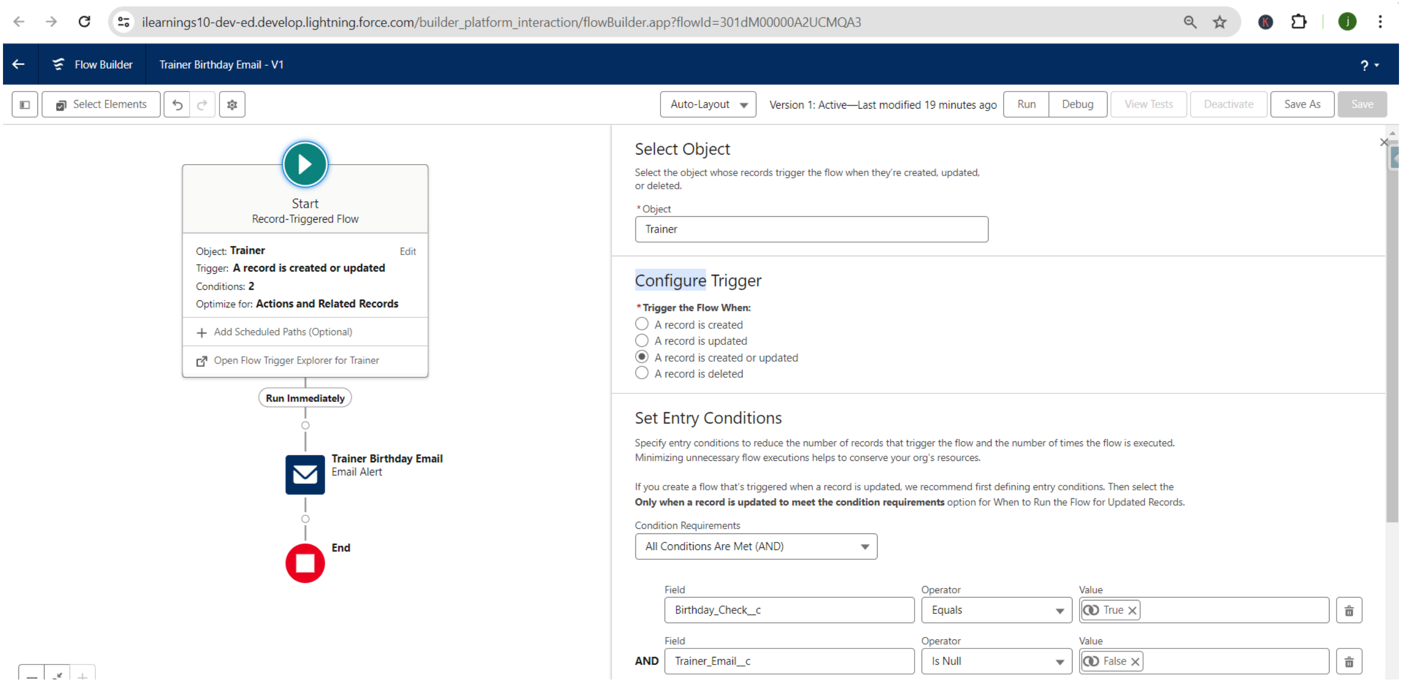
To express our gratitude, we are pleased to present you with [specific reward, e.g., a gift card, a day off, a bonus, etc.]. This is just a small token of appreciation for your hard work and the positive energy you bring to our workplace.

Thank you for being an indispensable part of our team. We look forward to many more years of growth, learning, and success together. We hope you have a fantastic birthday and a year ahead filled with happiness, health, and continued achievements.

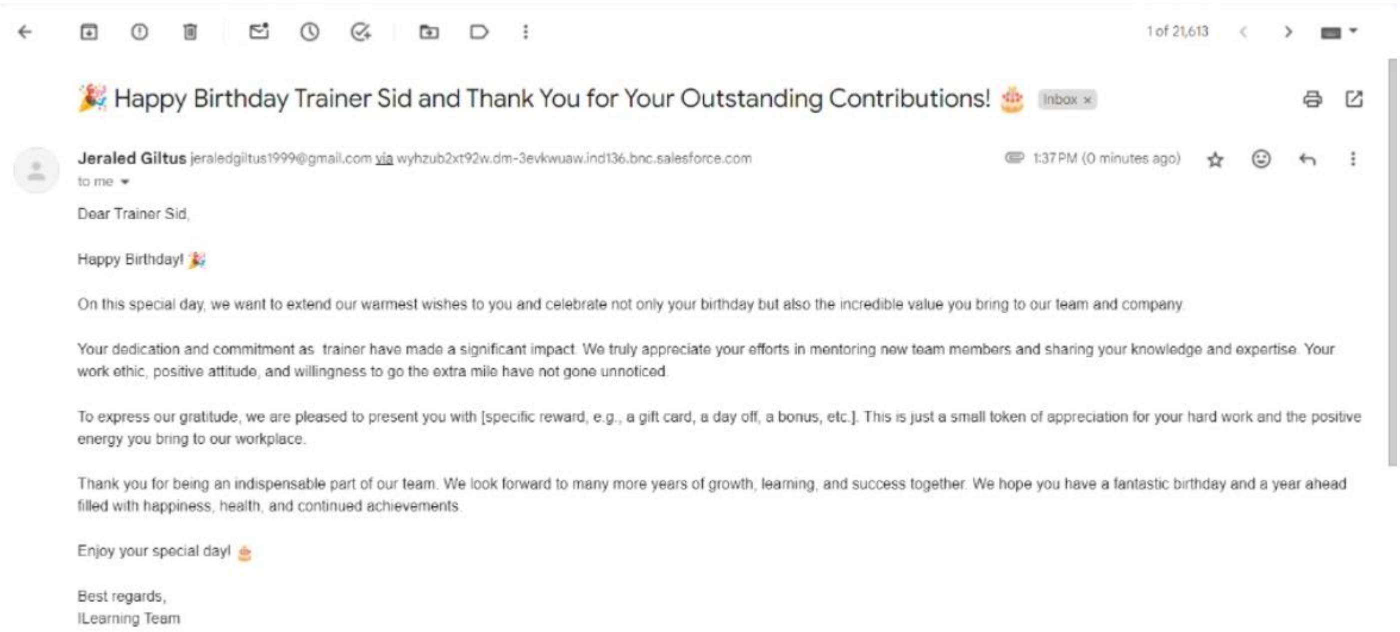
Enjoy your special day! 🎂

Best regards,
ILearning Team

Flow :



Result :

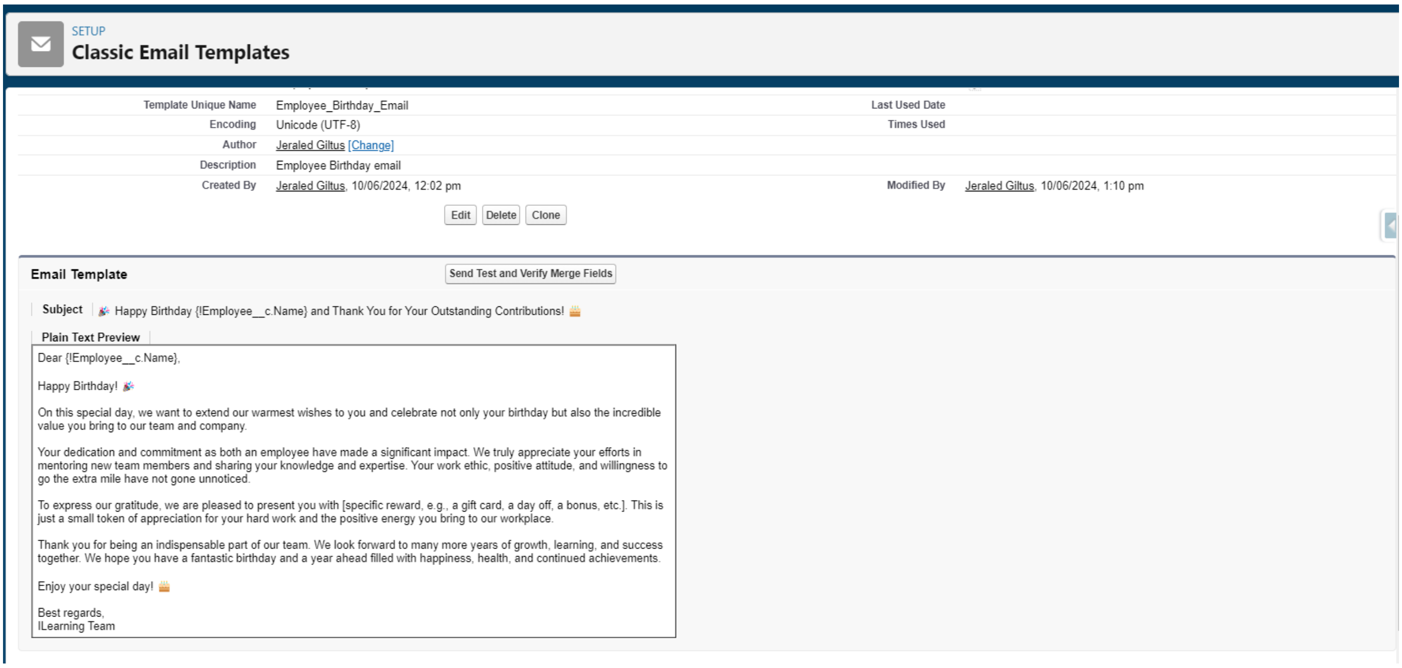


5. Employee Birthday Email :

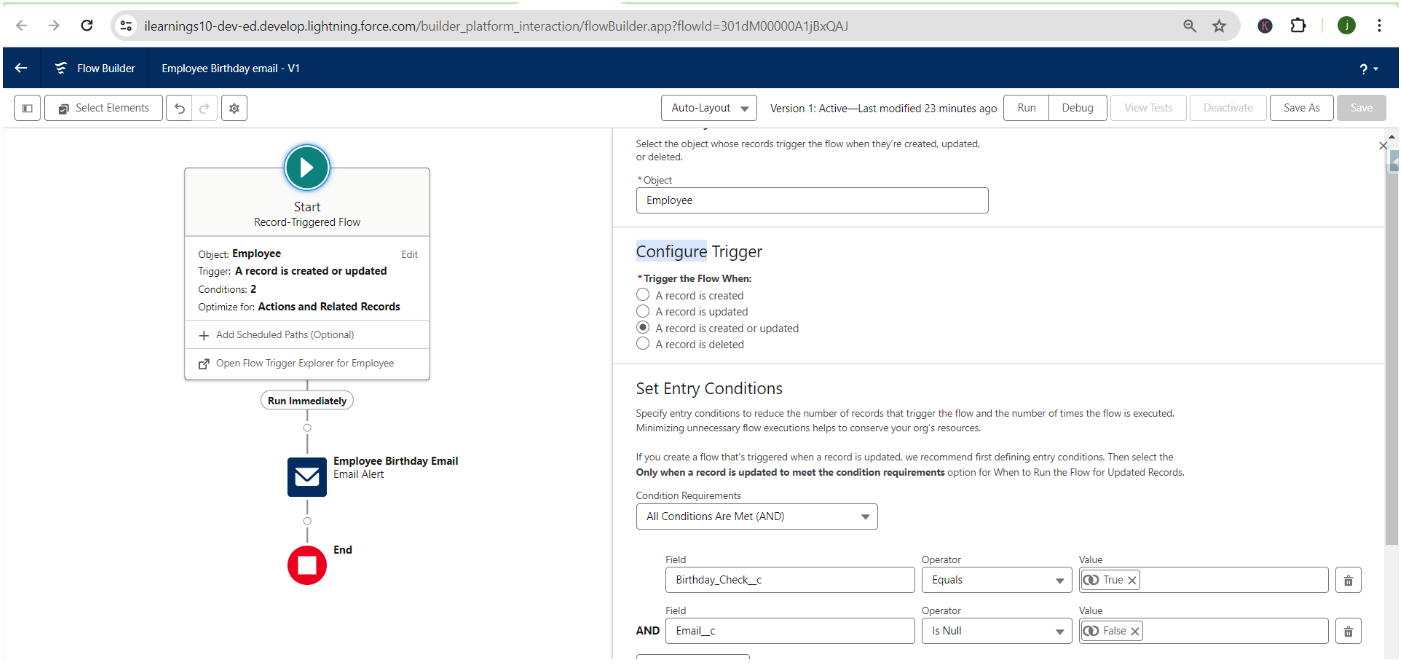
➢ In this I have created an record-trigger flow, I have created an custom formula field with an formula when birth date(month,day) equals to Today(month,date) an check is checked and when the check box is updated an email should be triggered to the Employee.

➢ I have created an email template then created an email alert and build the flow using flow builder.

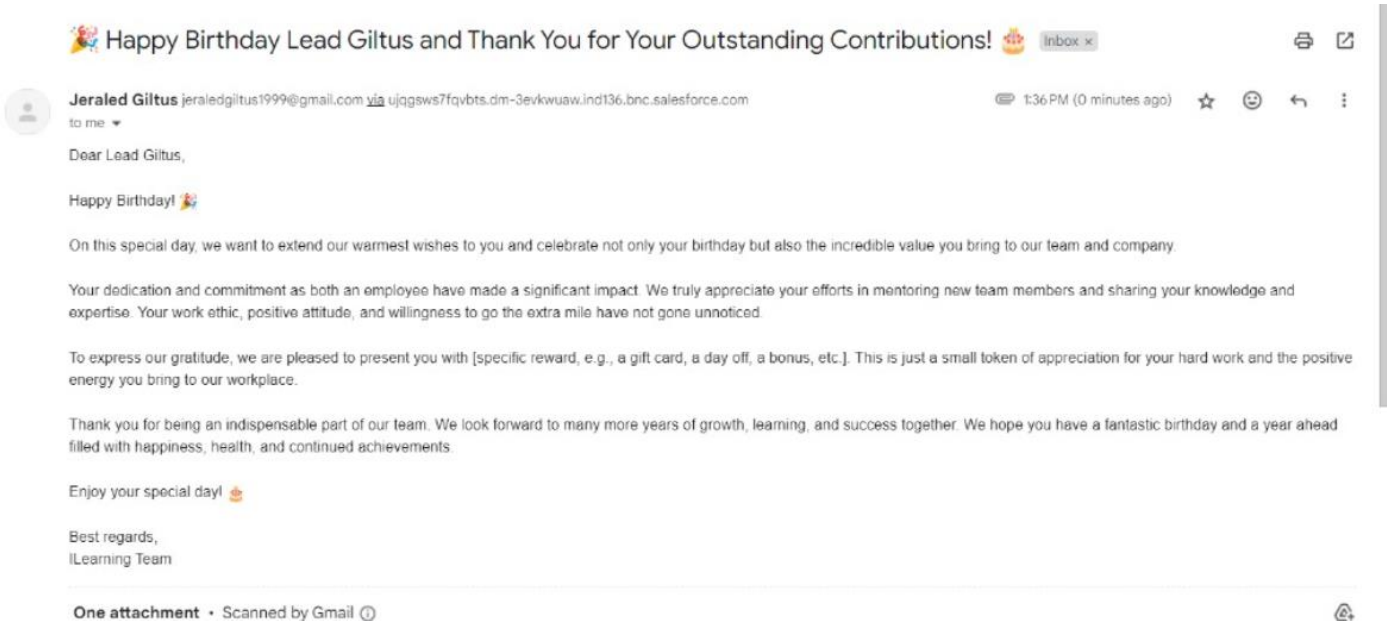
Template :



Flow :



Result :



🎉 Happy Birthday Lead Giltus and Thank You for Your Outstanding Contributions! 🎂 Inbox ×

Jeraled Giltus jeraledgiltus1999@gmail.com via ujqgsws7fqvbts.dm-3evkwuaw.ind136.bnc.salesforce.com   1:36 PM (0 minutes ago)

to me

Dear Lead Giltus,

Happy Birthday! 🎉

On this special day, we want to extend our warmest wishes to you and celebrate not only your birthday but also the incredible value you bring to our team and company.

Your dedication and commitment as both an employee have made a significant impact. We truly appreciate your efforts in mentoring new team members and sharing your knowledge and expertise. Your work ethic, positive attitude, and willingness to go the extra mile have not gone unnoticed.

To express our gratitude, we are pleased to present you with [specific reward, e.g., a gift card, a day off, a bonus, etc.]. This is just a small token of appreciation for your hard work and the positive energy you bring to our workplace.

Thank you for being an indispensable part of our team. We look forward to many more years of growth, learning, and success together. We hope you have a fantastic birthday and a year ahead filled with happiness, health, and continued achievements.

Enjoy your special day! 🎂

Best regards,
ILearning Team

One attachment • Scanned by Gmail