PRINCE SHRI VENKATESHWARA PADMAVATHY ENGINEERING COLLEGE

(An Autonomous Institution)

Ponmar, Chennai – 600127.

DEPARTMENT OF IT&CSE AND ENGINEERING

Academic Year:2024-2025

TEAM MEMBERS Name :

1.Y.Britto

2.P.Jayaram Sakthi

3.R.BharathHari

4.A.Yogesh Raj

5.R.J.Gnani Dharma Cholan

6. M.Mahadevan

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BONAFIDE CERTIFICATE

Team Members Name :

1.Y.Britto
2.P.Jayaram Sakthi
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5.R.J.Gnani Dharma Cholan
6. M.Mahadevan

Certified that this is a Bonafide Record of the work done by the above student above student in salesforce certificate internship during the academic year 2024- 2025.

Signature of Faculty In-Charge Signature of Principal **Submitted for**

Practical Examination held on ………………………. Internal Examiner

DECLARATION

We, Bharath.G (Reg.no:411722205004), Gowtham.S(Reg.No: 411722205008), Santhosh Kumar(Reg.No: 411722205009), Sulthan Mahroos.Z(Reg.No: 411722205054) hereby declare that the Project Report entitled done by me under the guidance of Mr.Preeth Baran Rajendran, at prince shri venkateshwara padmavathy engineering college is submitted in partial fulfillment of the requirements for the award of Bachelor of Engineering degree in Information of Technology

DATE:

PLACE:

SIGNATURE OF THE CANDIDATE

ACKNOWLEDGEMENT

I am pleased to express my sincere gratitude to the **management of Tech Forces** for their support and encouragement in successfully completing this project. I am truly grateful for their guidance throughout this journey.

I extend my heartfelt thanks to **Mr.Preeth Bhran rajend**, for providing valuable insights and direction during the development of this project. Their expertise and continuous support were instrumental in shaping the project effectively.

I convey my sincere appreciation to the **Sales, Marketing, and Customer Support Teams** for sharing their requirements and feedback, which helped in designing a system that meets the company's needs.

I am deeply grateful to my **Project Guide Mr.Preeth Bhran rajendran** , for their invaluable guidance, suggestions, and encouragement that contributed to the successful execution of this project.

I also extend my thanks to the **Salesforce Development Team**, for their technical expertise in implementing custom objects, automation workflows, and reporting tools.

Lastly, I would like to express my gratitude to all the **stakeholders, testers, and end-users** who provided feedback and participated in the validation process, ensuring the project's success.

Thank you!

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ABSTRACT

EduTech Innovations aims to enhance its **Salesforce CRM system** to improve **client relationship management, process automation, and engagement tracking** for educational institutions and learners. This project focuses on optimizing **lead management, customer interactions, and reporting** to streamline operations and enhance decision-making.

The proposed solution includes:

- **Custom Objects & Fields** to manage courses, student feedback, and institutional partnerships.
- **Process Automation** using **Salesforce Process Builder & Flow** for lead conversion, follow-ups, and communication tracking.
- **Reports & Dashboards** to provide real-time insights into sales performance, customer engagement, and service effectiveness.

The project follows a structured approach:

1. **Requirement Gathering** – Identifying gaps and opportunities through stakeholder discussions.
2. **Design & Development** – Implementing CRM enhancements, automated workflows, and custom reports.
3. **Testing & Validation** – Ensuring system reliability through unit testing and user acceptance testing (UAT).
4. **Monitoring & Iteration** – Continuously improving based on performance metrics and user feedback.

By integrating advanced Salesforce functionalities, this project aims to **streamline operations, enhance customer engagement, and improve business efficiency** for EduTech Innovations.

Problem Statement:

EduTech Innovations, a company specialising in educational technology solutions, wants to enhance their Salesforce CRM system to better manage client relationships, streamline processes, and track engagement across their services. They aim to improve functionality in managing leads, opportunities, and customer interactions, particularly focusing on educational institutions and learners.

Aim

The primary goal of this project is to modernize the Salesforce CRM system for EduTech Innovations to enable seamless management of leads, opportunities, and customer interactions. The enhanced system will offer automation, real-time analytics, and structured data management, allowing sales and support teams to optimize their workflow and improve customer satisfaction.

Introduction:

* EduTech Innovations, a leading provider of educational technology solutions, aims to enhance its Salesforce CRM system to improve customer relationship management, streamline operational processes, and gain deeper insights into customer engagement. As the company expands its offerings to educational institutions and individual learners, its existing CRM system lacks the necessary customization and automation to handle industry-specific requirements efficiently.

* Managing leads, tracking sales opportunities, and ensuring smooth communication with clients are critical to the company's success. However, the current system does not provide comprehensive visibility into customer interactions, service effectiveness, or the sales pipeline. To address these challenges, EduTech Innovations is implementing a robust Salesforce

architecture tailored to the EdTech industry. By integrating custom objects, automating key workflows, and building interactive dashboards, the company aims to optimize its CRM for improved productivity, customer engagement, and business growth.

Summary:

To enhance its Salesforce CRM system, EduTech Innovations will focus on three major areas: **custom objects and fields, process automation, and reports and dashboards.** These enhancements will ensure efficient lead management, seamless opportunity tracking, and improved customer interactions.

1. Custom Objects and Fields

To cater to the specific needs of the educational technology sector, EduTech Innovations will introduce custom objects and fields within Salesforce. These enhancements will allow the company to better structure and manage industry-specific data. Key custom objects include:

- **Courses & Programs:** Stores details on course offerings, duration, pricing, and instructor information.
- **Student Feedback & Ratings:** Collects and analyzes feedback from learners to assess course effectiveness.
- **Institutional Partnerships:** Tracks collaborations with schools, colleges, and universities, including contract details.
- **Learning Preferences:** Captures data on preferred learning methods (e.g., online, in-person, hybrid) to personalize offerings.
- **Subscription & Licensing Details:** Manages licensing information for institutions using EduTech's solutions. Additionally, existing Salesforce

objects such as Leads, Contacts, Accounts, and Opportunities will be enhanced with education-specific fields. These fields will store data such as institution type, academic year, preferred learning formats, and engagement history.

-

2. Process Automation

To improve efficiency and reduce manual workloads, Salesforce **Flow** and **Process Builder** will be leveraged to automate critical business processes. Key automation initiatives include:

- **Lead Qualification & Conversion:** Automatically assigns lead scores and converts high-potential leads.
- **Follow-up & Engagement Tracking:** Sends automated follow-ups, reminders, and task assignments.
- **Course Enrollment Workflows:** Streamlines student registrations, confirmations, and payment tracking.
- **Customer Support Case Routing:** Automatically assigns service cases based on issue type and urgency.
- **Renewal & Upsell Notifications:** Sends reminders for subscription renewals, course upgrades, and add-on services.
- **Data Validation & Duplicate Prevention:** Ensures data accuracy by preventing duplicate records and enforcing validation rules. These automation processes will ensure that the sales and support teams spend less time on repetitive tasks and more time focusing on customer engagement and relationship building.

3. Reports and Dashboards

Real-time insights and analytics are crucial for data-driven decision-making. EduTech Innovations will develop customized Salesforce **Reports and Dashboards** to monitor key performance metrics, including:

  - **Sales Performance & Revenue Reports:** Tracks revenue trends, sales cycle length, and conversion rates.
- **Customer Engagement Dashboards:** Analyzes interaction frequency, service requests, and feedback trends.
- **Lead and Opportunity Tracking:** Monitors the pipeline from lead generation to deal closure.

- **Course Enrollment Trends:** Evaluates popular courses, student demographics, and enrollment growth.
- **Marketing Campaign Effectiveness:** Measures lead generation and conversion rates from marketing efforts.
- **Instructor Performance Metrics:** Tracks course completion rates and student satisfaction scores.

By utilizing these reports and dashboards, decision-makers will gain real-time visibility into business performance and customer behaviors, allowing them to refine strategies and optimize engagement efforts.

4. Integration with Third-Party Applications

To enhance the functionality of Salesforce, EduTech Innovations will integrate it with key external platforms, including:

- **Learning Management Systems (LMS):** Syncs course enrollments, attendance, and completion data.
- **Email & Communication Tools:** Connects with Outlook, Gmail, and Slack for seamless communication logging.
- **Payment Gateways:** Automates invoice generation and payment tracking for course subscriptions.
- **Marketing Automation Tools:** Integrates with platforms like Pardot and HubSpot to improve lead nurturing and email campaigns.

These integrations will create a unified system that eliminates data silos and improves workflow efficiency.

5. Security & Access Management

Ensuring data security and compliance is a top priority. Salesforce will be configured with:

- **Role-Based Access Control:** Restricts access to sensitive data based on user roles (e.g., Sales, Support, Admin).
- **Data Encryption & Compliance:** Aligns with industry regulations such as **GDPR** and **FERPA** to protect customer information.
- **Audit Trails & Activity Logs:** Maintains records of user actions for accountability and data integrity.

Proposed Salesforce Architecture

System Architecture

The Salesforce architecture for EduTech Innovations will be designed with the following key components:

- **Data Model:** Custom objects and fields to store education-specific information such as courses, student feedback, and institutional partnerships.
- **Business Logic Layer:** Process automation through Salesforce Flow and Process Builder to optimize lead conversion, follow-ups, and customer communication.
- **User Interface Layer:** Custom Lightning components and optimized page layouts for intuitive navigation and user experience.
- **Integration Layer:** API connections with Learning Management Systems (LMS), payment gateways, and email communication tools.
- **Security Layer:** Role-based access control and data encryption to ensure data security and compliance with regulatory requirements.

Modules and Module Description

1. **Custom Objects and Fields**
    - **Course Management:** Custom object to track course details, duration, and enrollment status.
    - **Student Feedback:** Captures student ratings and comments for evaluating course effectiveness.
    - **Institutional Partnerships:** Tracks collaborations with educational institutions, including contract details.
    - **Learning Preferences:** Stores preferred learning methods to personalize course recommendations.
    - **Subscription & Licensing:** Manages subscription plans for institutions and individual users.
2. **Process Automation**
    - **Lead Qualification & Conversion:** Automates scoring and conversion of leads.

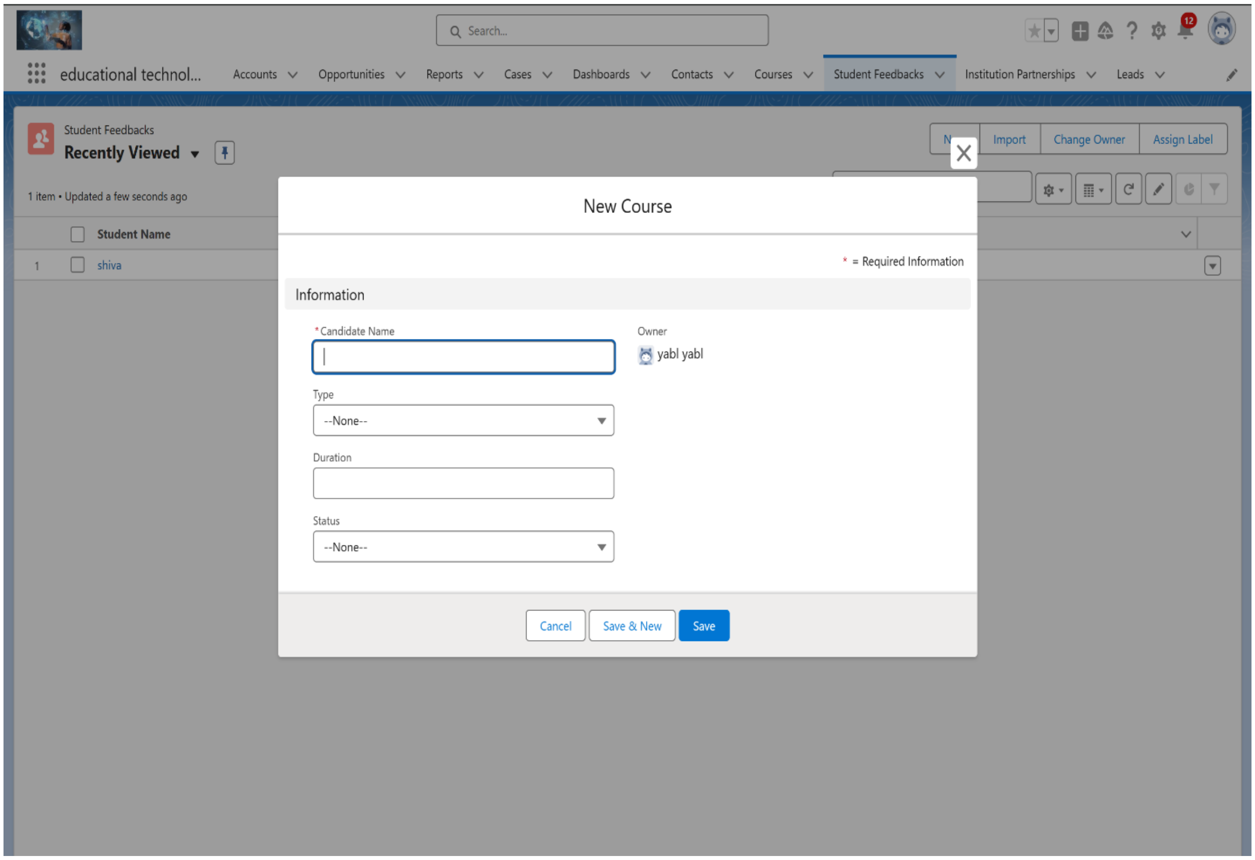
- **Follow-up & Engagement Tracking:** Sends reminders, follow-ups, and task assignments automatically.
- **Course Enrollment Workflows:** Automates student registration and payment processing.
- **Customer Support Case Routing:** Assigns support tickets based on priority and category.
- **Renewal & Upsell Notifications:** Notifies customers about subscription renewals and upgrade options.

3. **Reports and Dashboards**
    - **Sales Performance Reports:** Tracks revenue growth, lead conversion rates, and sales pipeline.
    - **Customer Engagement Dashboards:** Analyzes service request trends and customer interactions.
    - **Lead and Opportunity Tracking:** Provides insights into sales funnel progression.
    - **Course Enrollment Trends:** Tracks popular courses, student demographics, and enrollment growth.
    - **Marketing Campaign Effectiveness:** Measures the impact of lead generation campaigns.
4. **Third-Party Integrations**
    - **LMS Integration:** Syncs course enrollments, attendance, and completion data.
    - **Email & Communication Tools:** Integrates with Outlook, Gmail, and Slack for seamless communication.
    - **Payment Gateway Integration:** Automates invoicing and payment tracking.
    - **Marketing Automation Tools:** Connects with Pardot and HubSpot to enhance lead nurturing.
5. **Security & Access Management**
    - **Role-Based Access Control:** Restricts data access based on user roles (Sales, Support, Admin).
    - **Data Encryption & Compliance:** Ensures compliance with GDPR and FERPA regulations.

  - **Audit Trails & Activity Logs:** Logs user activities to ensure data integrity and accountability.

Custom Objects and Fields Creation:

- **Creation of Custom Objects:** Developed custom objects in Salesforce to manage educational data efficiently.
-
- **Course Object:** Created a “Course” object with fields such as Course Name (Text), Type (Picklist), Duration (Number), and Status (Picklist).
-
- **Student Feedback Object:** Designed a “Student Feedback” object with fields including Student Name (Lookup), Course (Lookup), Feedback Score (Number), and Comments (Text Area).
-
- **Institutional Partnerships Object:** Established an “Institutional Partnership” object with fields like Institution Name (Text), Contact Person (Lookup), Start Date (Date), and End Date (Date).
-
- **Relationships Setup:**
  - Created a Lookup relationship between “Course” and “Institutional Partnership” for course-institution mapping.
  - Created a Lookup relationship between “Student Feedback” and “Course” to associate feedback with specific courses.
  -
- **Field-Level Security:** Configured field visibility based on user profiles to ensure appropriate access control.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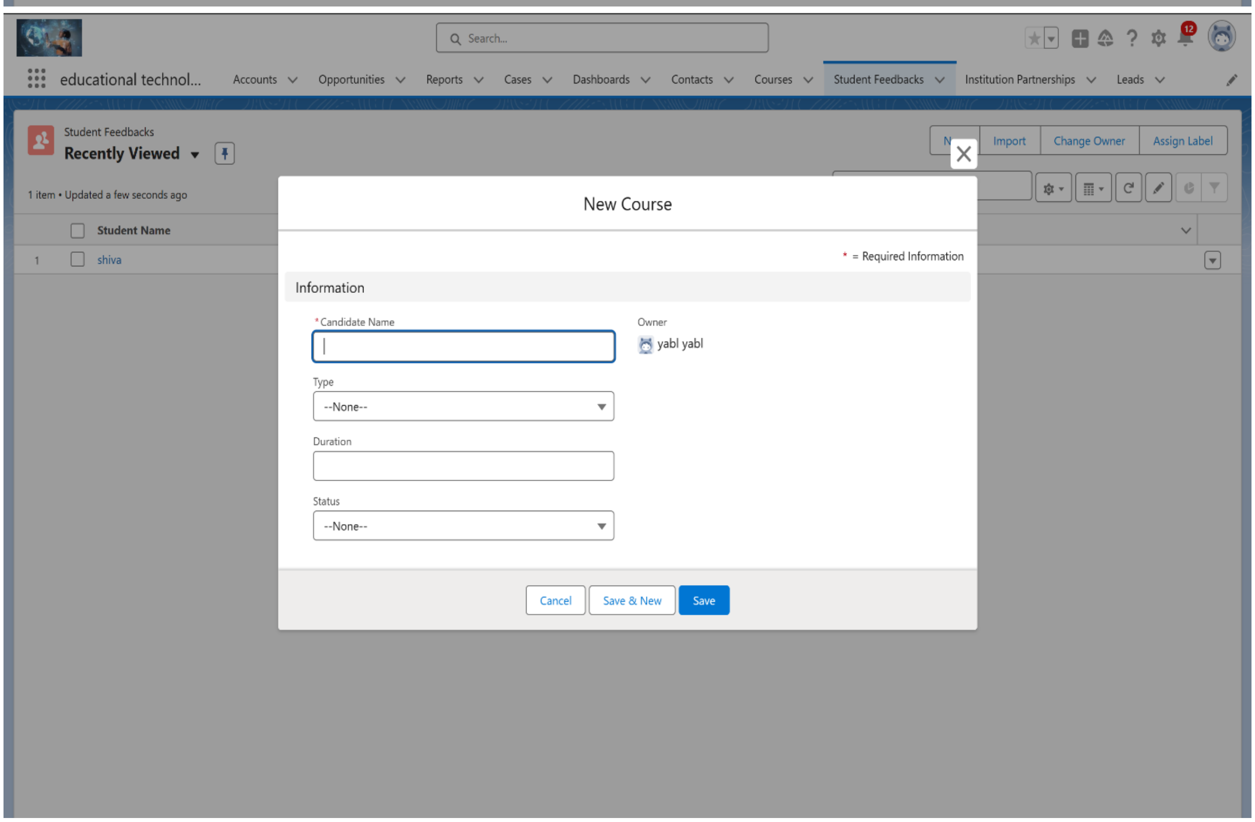
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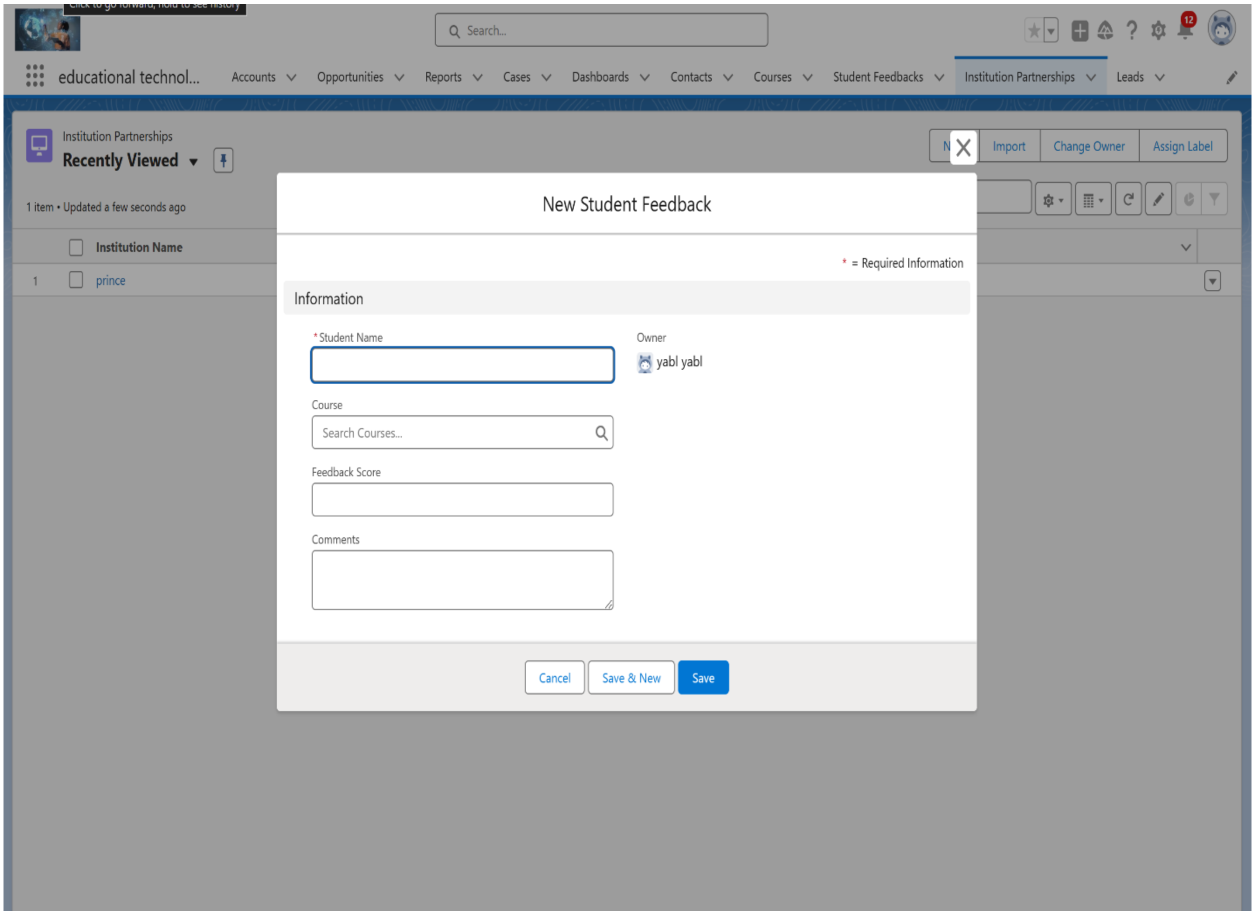
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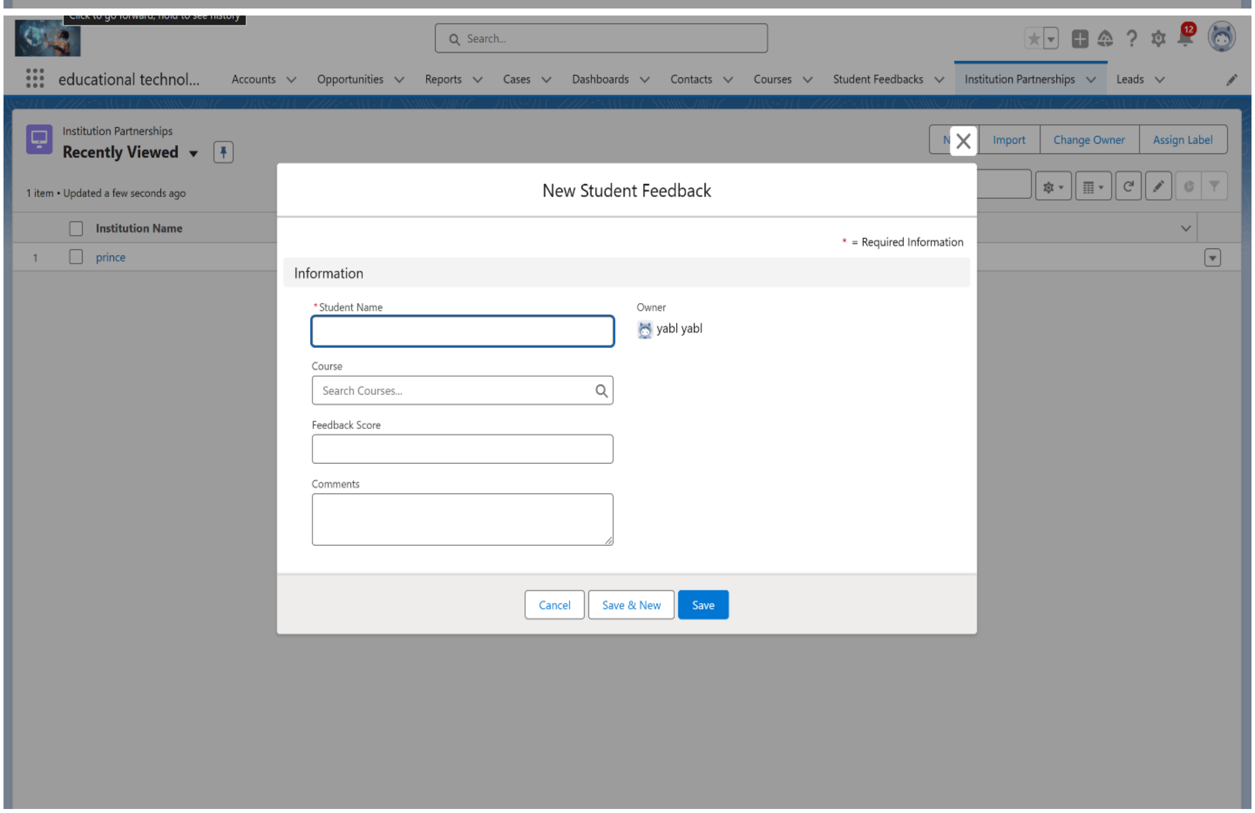
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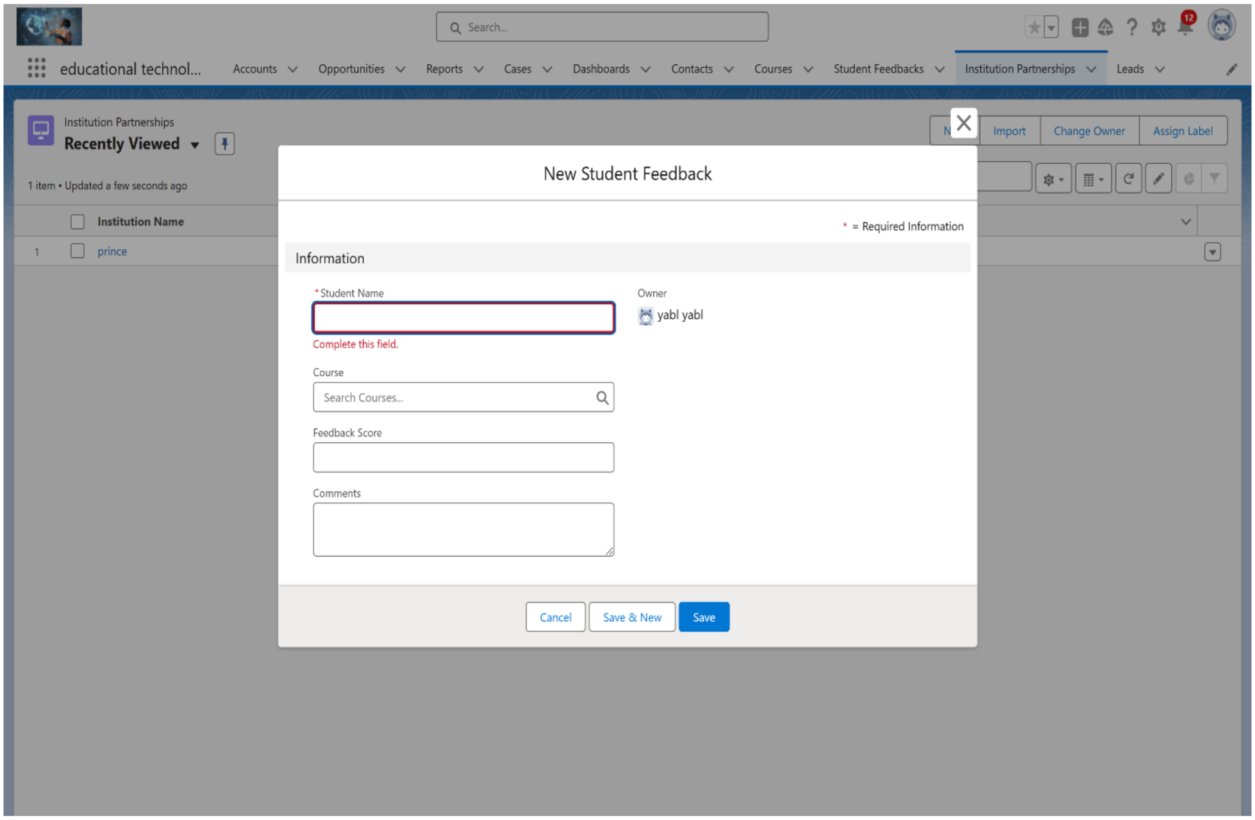
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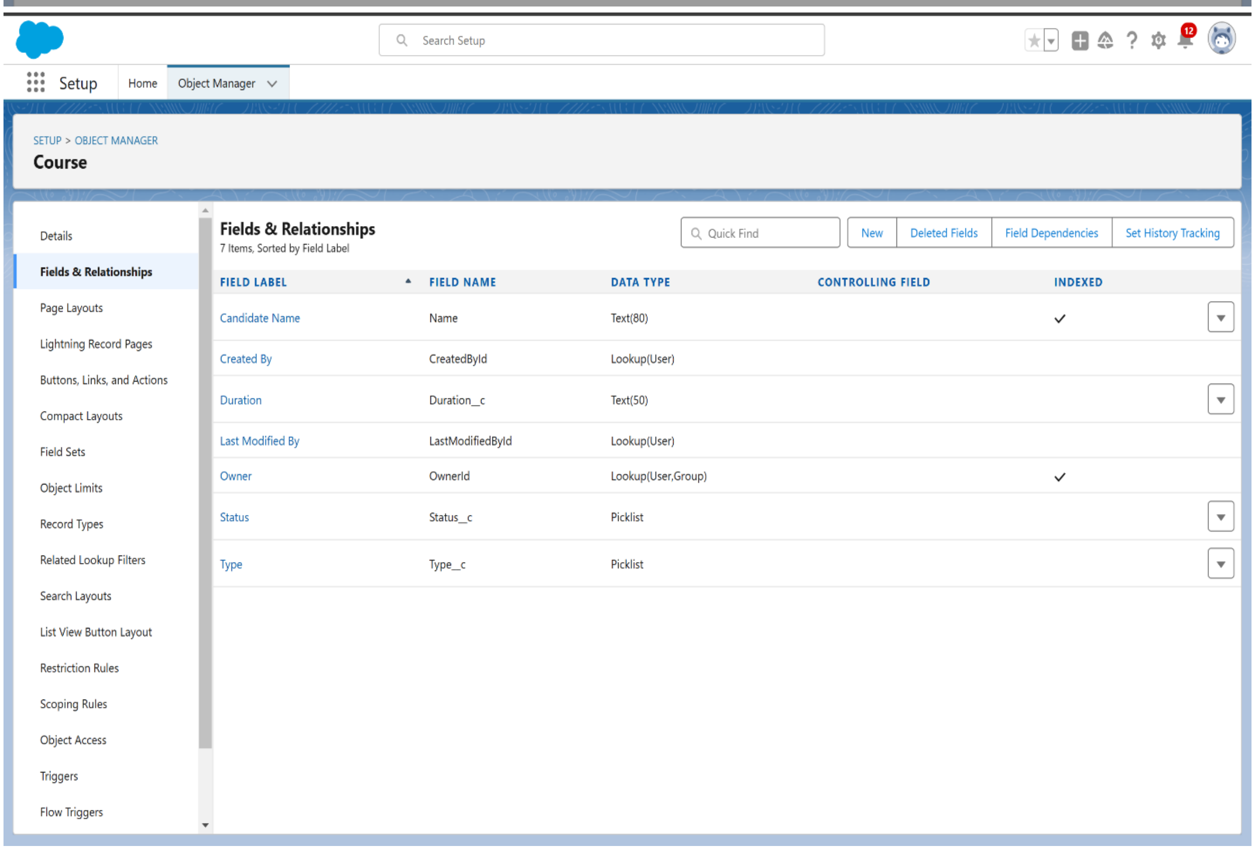
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Triggers
Flow Triggers
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Deleted Fields
Field Dependencies
Set History Tracking
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FIELD NAME
DATA TYPE
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Lookup(User)
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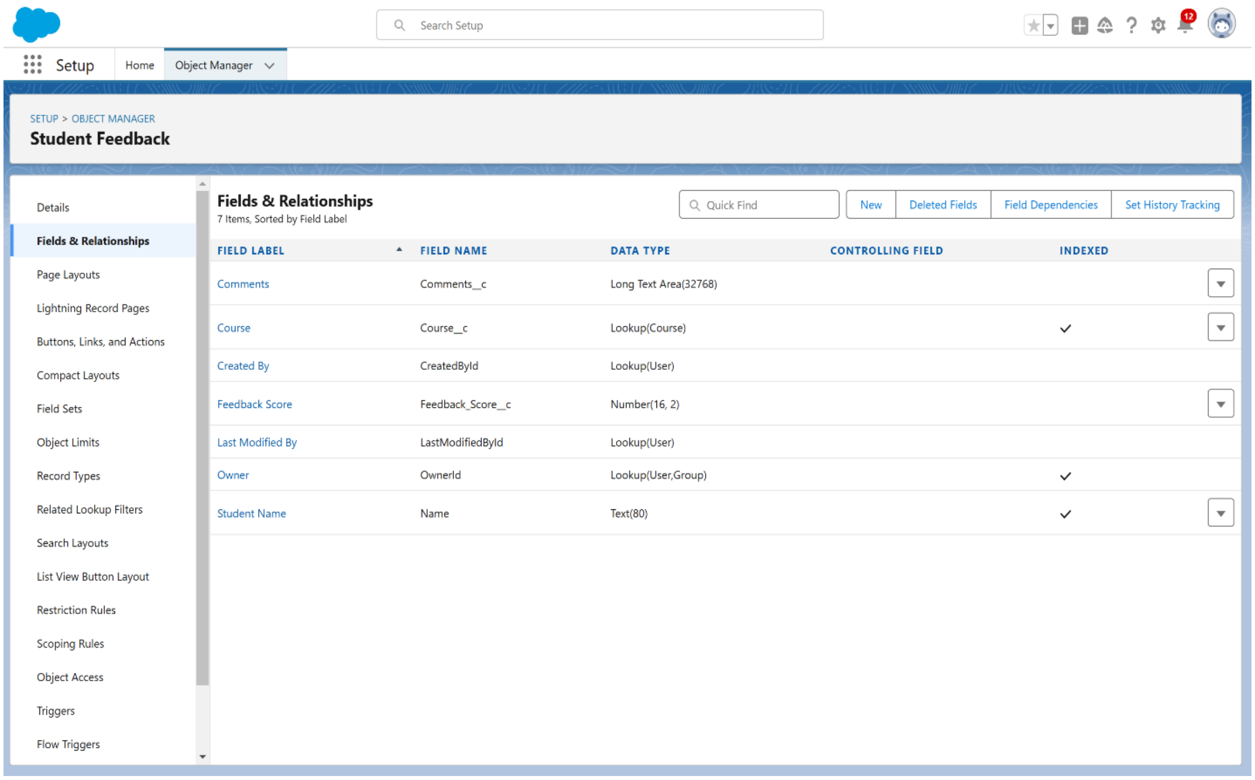
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7 Items, Sorted by Field Label
Quick Find
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Deleted Fields
Field Dependencies
Set History Tracking
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Lookup(Course)
Created By
CreatedById
Lookup(User)
Feedback Score
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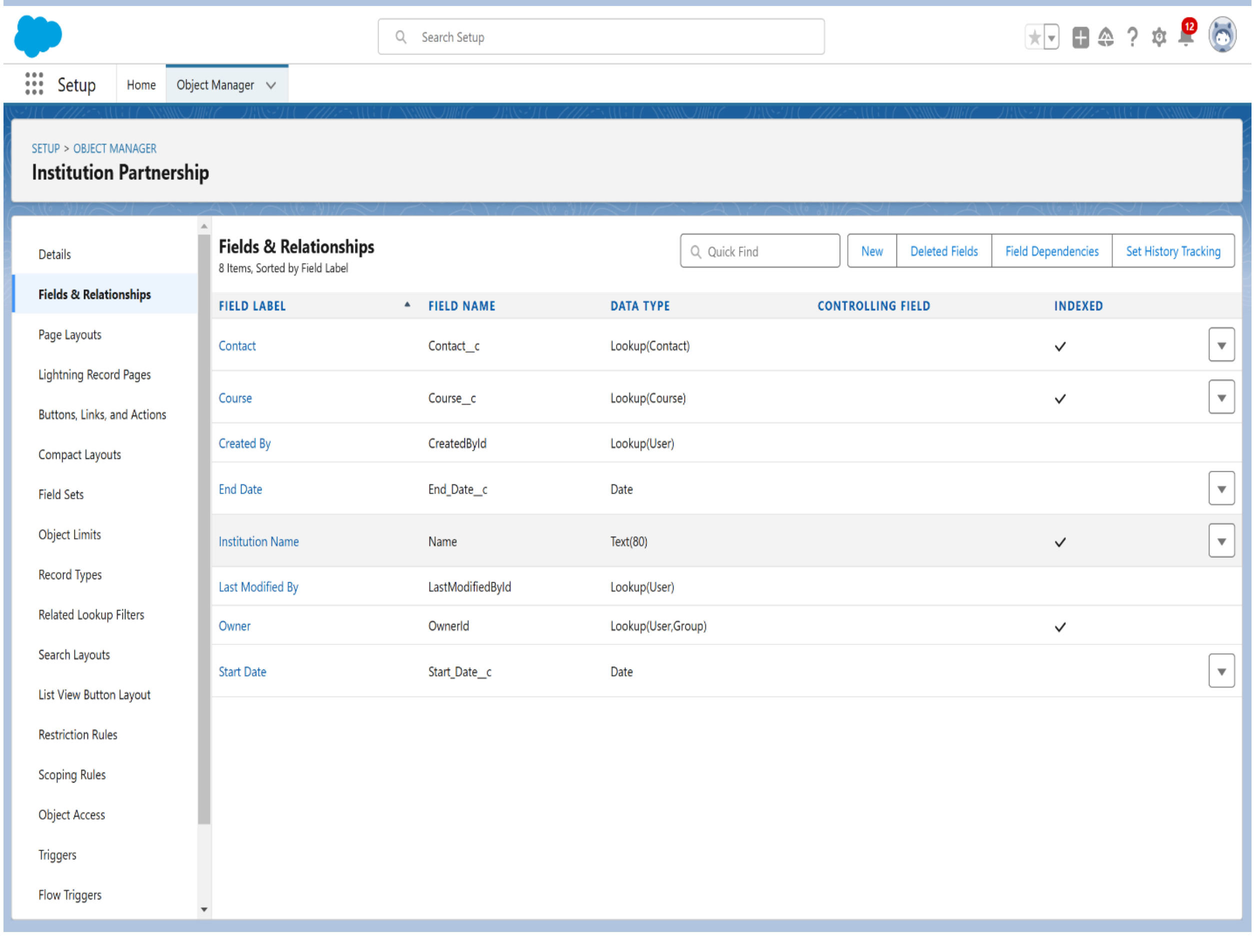
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Course
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Text(80)
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LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Start Date
Start_Date__c
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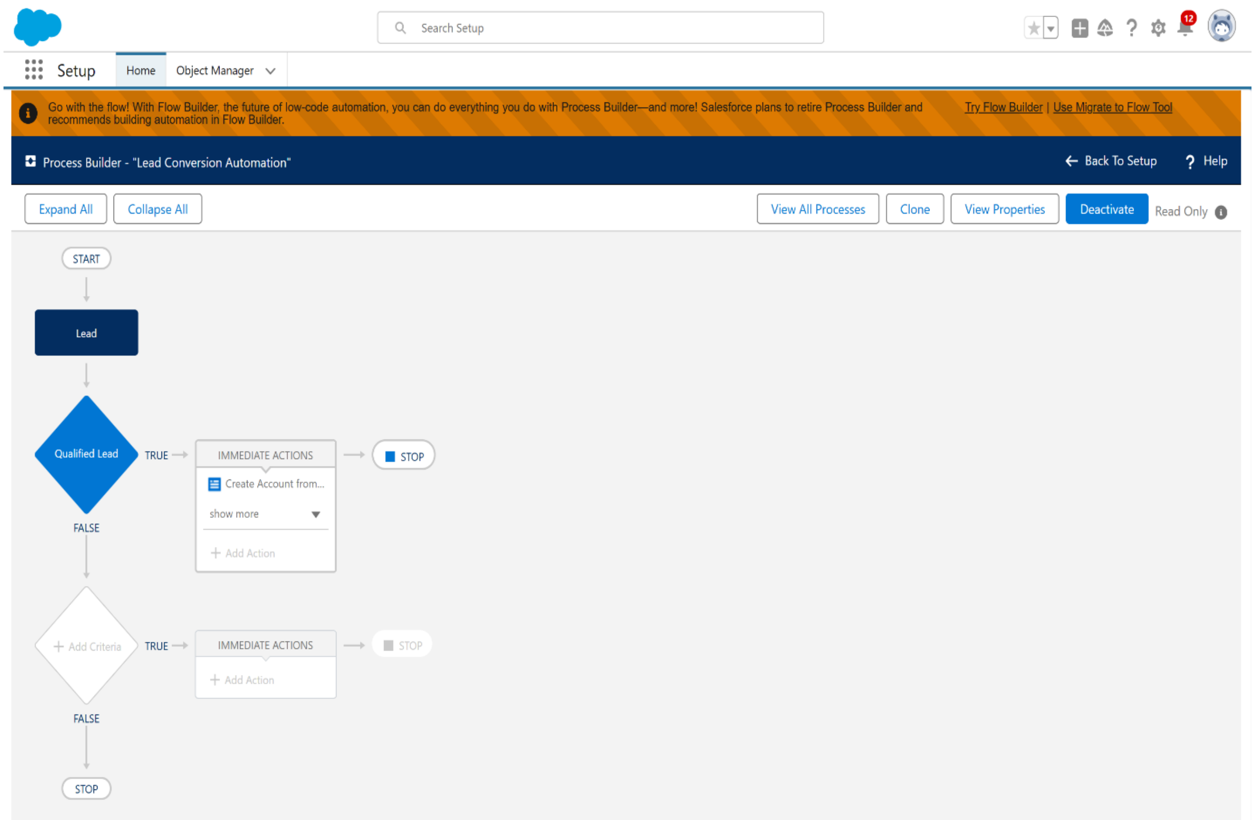
Lead Conversion Automation

- **Objective:** Implemented a **Lead Conversion Automation** process in Salesforce using **Process Builder** to streamline and automate the lead conversion process.
- **Trigger Condition:** The process is triggered automatically when a lead's **status** is updated to **"Qualified"**, ensuring efficient lead conversion without manual intervention.
- **Process Initiation:**
  - Configured the automation to start whenever a **Lead record is created or edited**.
  - Set up a condition to check if the **Lead Status** equals **"Qualified"** before executing further actions.
- **Automated Record Creation:**
  - **Account Creation:** A new **Account** is generated using the lead's **Company Name**, ensuring that the lead's business details are captured efficiently.
  - **Contact Creation:** A **Contact record** is automatically created with the lead's **Full Name**, maintaining seamless association between leads and customer contacts.
  - **Opportunity Creation:** A new **Opportunity** is created with the **Stage** set to **"Prospecting"**, allowing the sales team to track potential business opportunities effectively.
- **Activation & Execution:**
  - The process was activated to ensure it runs in real-time whenever a lead meets the defined criteria.
  - This automation significantly enhances efficiency by reducing manual effort in lead conversion, minimizing data entry errors, and ensuring data consistency across **Accounts, Contacts, and Opportunities**.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Try Flow Builder | Use Migrate to Flow Tool
Process Builder - "Lead Conversion Automation"
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Help
Expand All
Collapse All
View All Processes
Clone
View Properties
Deactivate
Read Only
START
Lead
Qualified Lead
TRUE
IMMEDIATE ACTIONS
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show more
Add Action
STOP
FALSE
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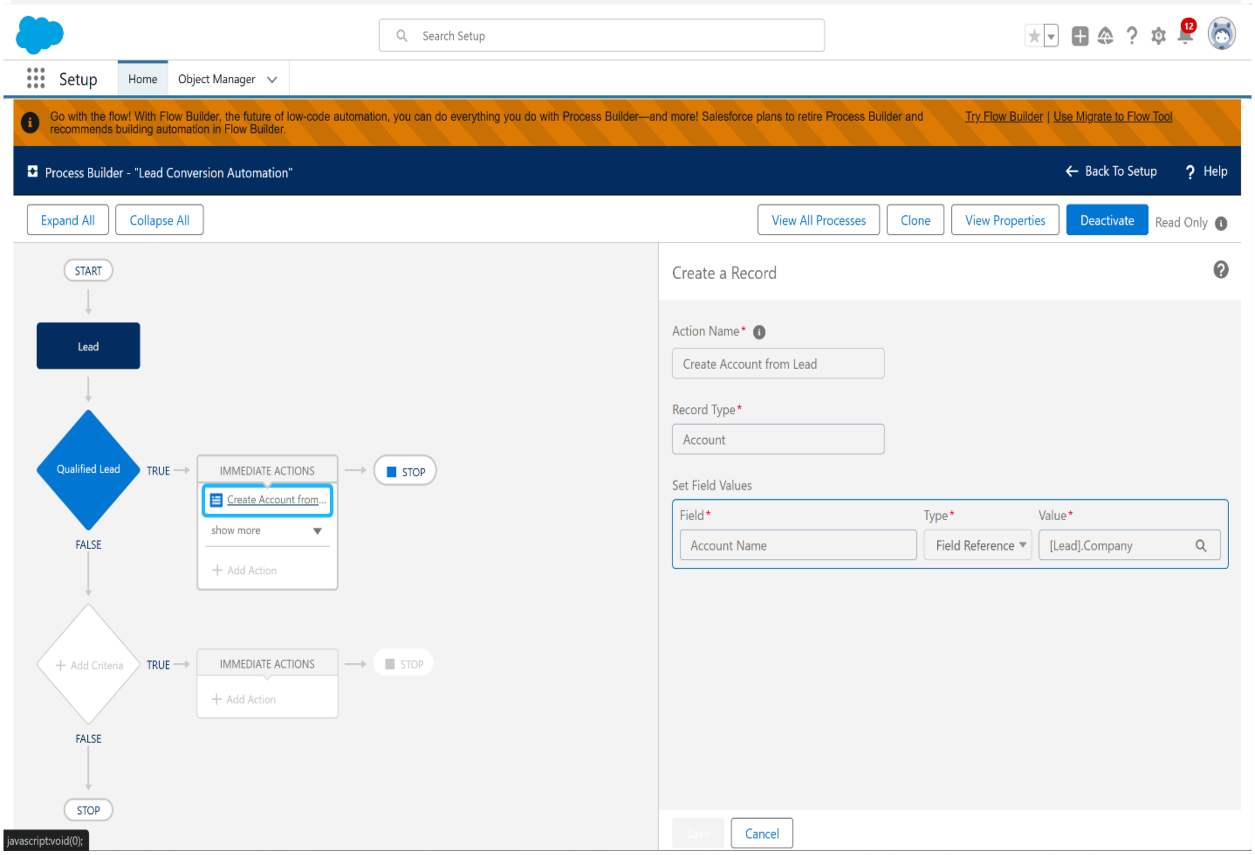
TRUE
IMMEDIATE ACTIONS
Add Action
STOP
FALSE
STOP

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IMMEDIATE ACTIONS
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STOP
FALSE
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javascript:void(0);
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Create Account from Lead
Record Type*
Account
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Type*
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Account Name
Field Reference
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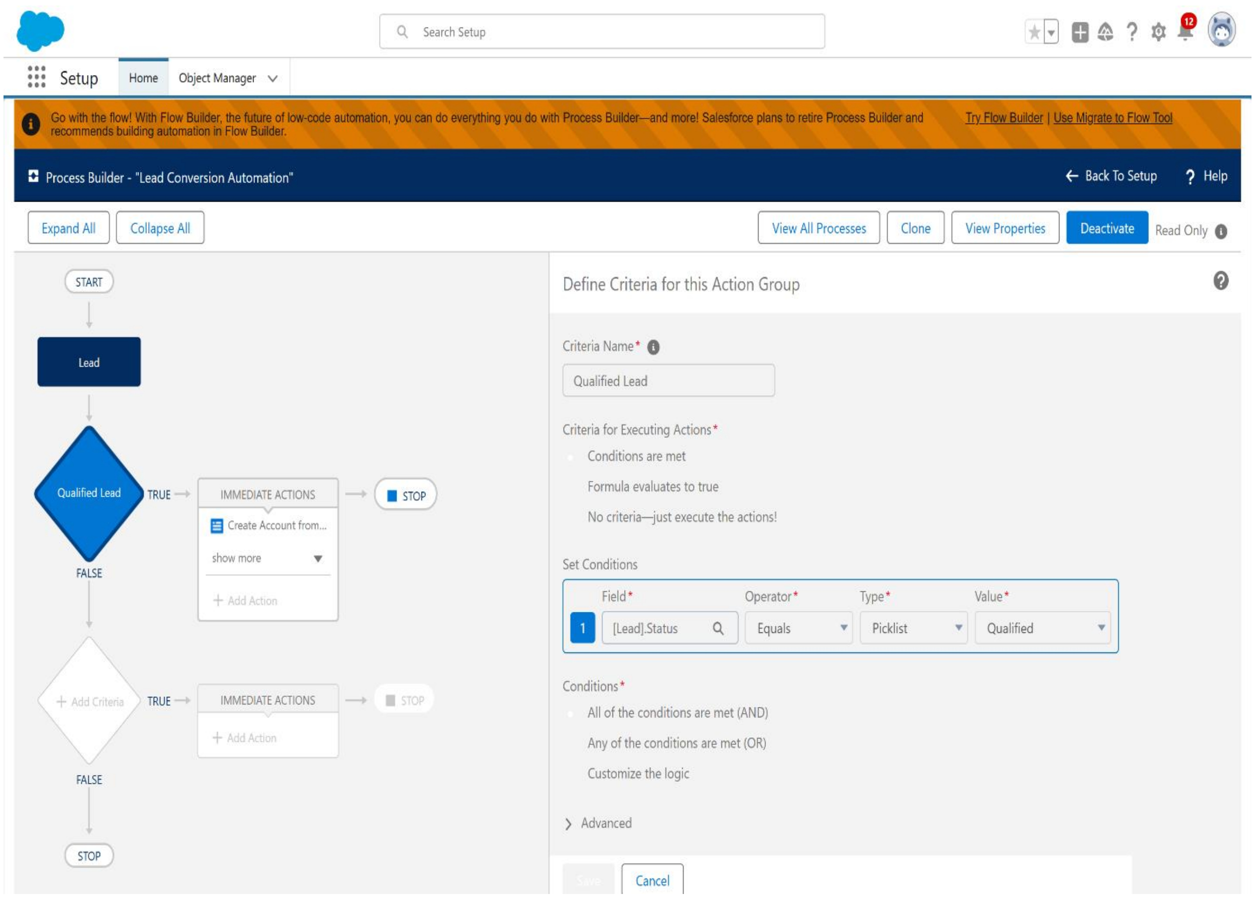
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Qualified Lead
TRUE
IMMEDIATE ACTIONS
Create Account from...
show more
Add Action
STOP
FALSE
Add Criteria
Define Criteria for this Action Group
Criteria Name*
Qualified Lead
Criteria for Executing Actions*
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No criteria—just execute the actions!
Set Conditions
Field*
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Any of the conditions are met (OR)
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Advanced
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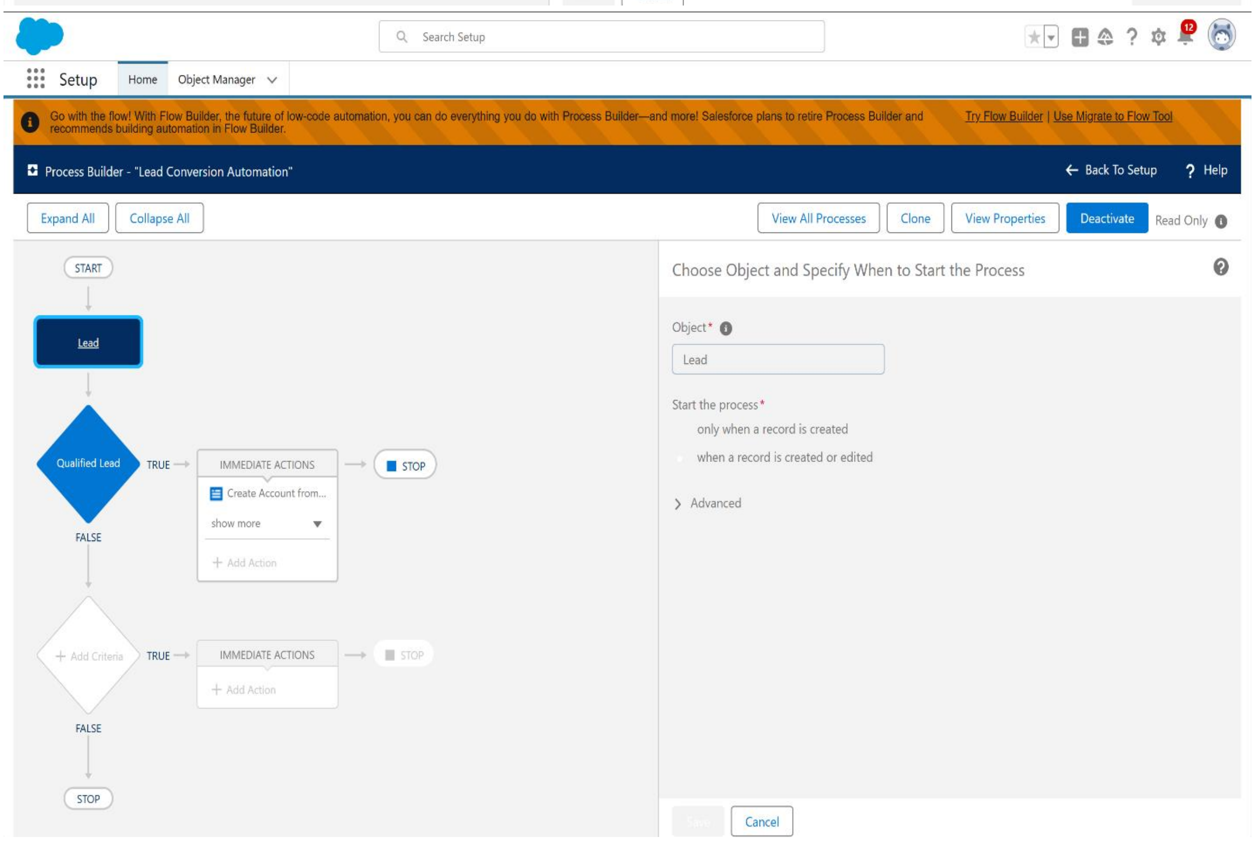
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Qualified Lead
TRUE
IMMEDIATE ACTIONS
Create Account from...
show more
Add Action
STOP
FALSE
Add Criteria
Choose Object and Specify When to Start the Process
Object*
Lead
Start the process*
only when a record is created
when a record is created or edited
Advanced
Cancel

Reports and Dashboards Implementation

- **Objective:** To improve data visibility, streamline lead tracking, and provide actionable insights, custom reports and dashboards were developed in Salesforce. These tools enable better decision-making by presenting key sales metrics in an intuitive and interactive format.

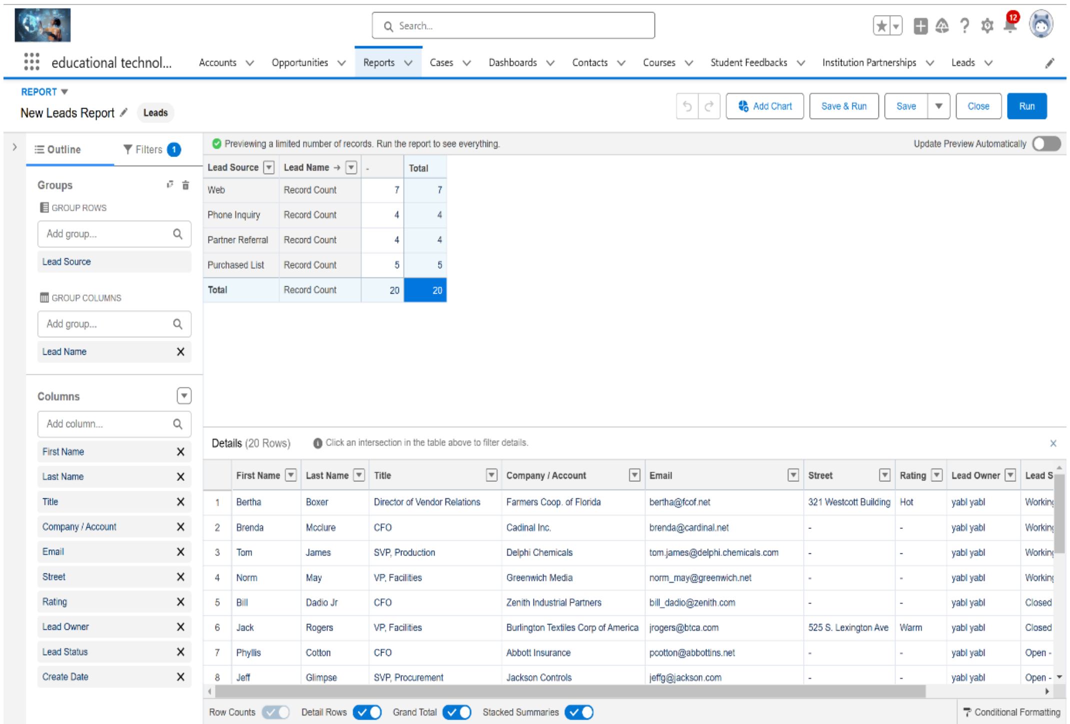
Leads Report Development

- A **Leads Report** was created to monitor incoming inquiries and assess lead sources effectively.

- The report was structured to include essential fields such as:
  - **Lead Name:** Identifies the individual associated with the inquiry.
  - **Company Name:** Captures the organization the lead is associated with.
  - **Lead Status:** Tracks the progress of the lead through the sales funnel.
  - **Lead Source:** Determines the origin of the lead (e.g., website, referral, advertisement).
  - **Created Date:** Provides insights into when the lead was generated.

- To enhance data analysis, leads were categorized based on their **Lead Source**, enabling a clear view of which channels were most effective.

- A summarization feature was applied to count the total number of leads per source, providing a quick and efficient way to measure performance.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Create Date
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Lead Source | Lead Name | Total
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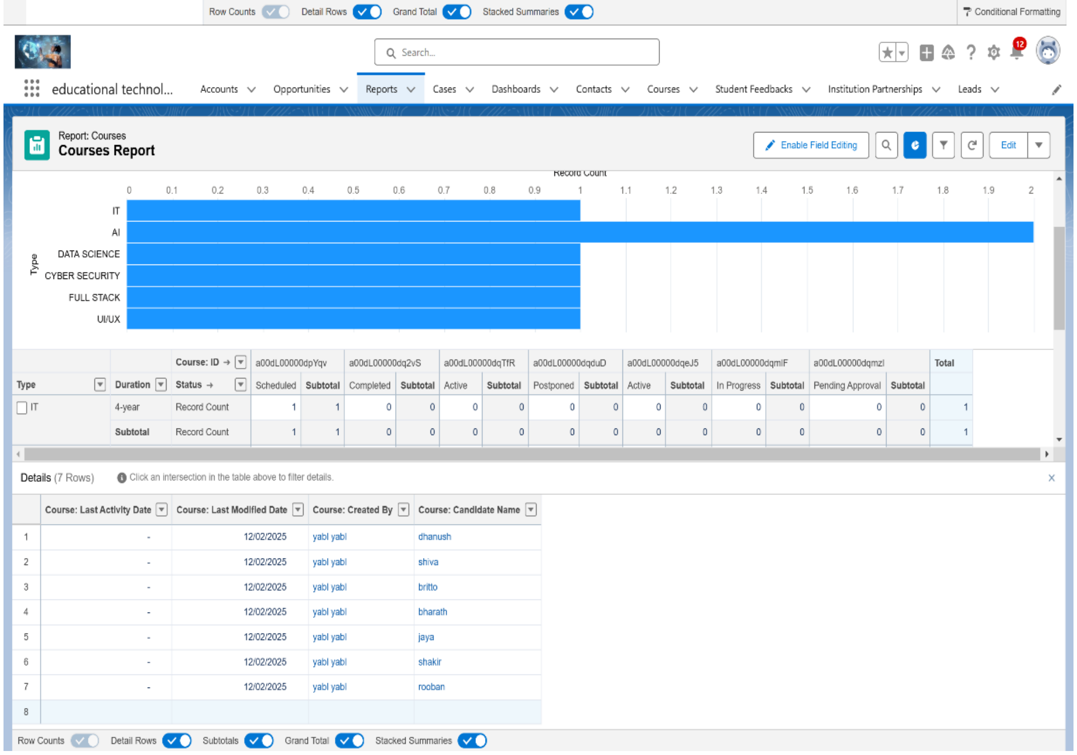
Phone Inquiry | Record Count | 4 | 4
Partner Referral | Record Count | 4 | 4
Purchased List | Record Count | 5 | 5
Total | Record Count | 20 | 20
Details (20 Rows)
Click an intersection in the table above to filter details.
First Name | Last Name | Title | Company / Account | Email | Street | Rating | Lead Owner
1 | Bertha | Boxer | Director of Vendor Relations | Farmers Coop. of Florida | bertha@fcof.net | 321 Westcott Building | Hot | yabl yabl
2 | Brenda | Mcclure | CFO | Cadinal Inc. | brenda@cardinal.net | - | - | yabl yabl
3 | Tom | James | SVP, Production | Delphi Chemicals | tom.james@delphi.chemicals.com | - | - | yabl yabl
4 | Norm | May | VP, Facilities | Greenwich Media | norm_may@greenwich.net | - | - | yabl yabl
5 | Bill | Dadio Jr | CFO | Zenith Industrial Partners | bill_dadio@zenith.com | - | - | yabl yabl
6 | Jack | Rogers | VP, Facilities | Burlington Textiles Corp of America | jrogers@btca.com | 525 S. Lexington Ave | Warm | yabl yabl
7 | Phyllis | Cotton | CFO | Abbott Insurance | pcotton@abbottins.net | - | - | yabl yabl
8 | Jeff | Glimpse | SVP, Procurement | Jackson Controls | jeffg@jackson.com | - | - | yabl yabl
Row Counts
Detail Rows
Grand Total
Stacked Summaries
Conditional Formatting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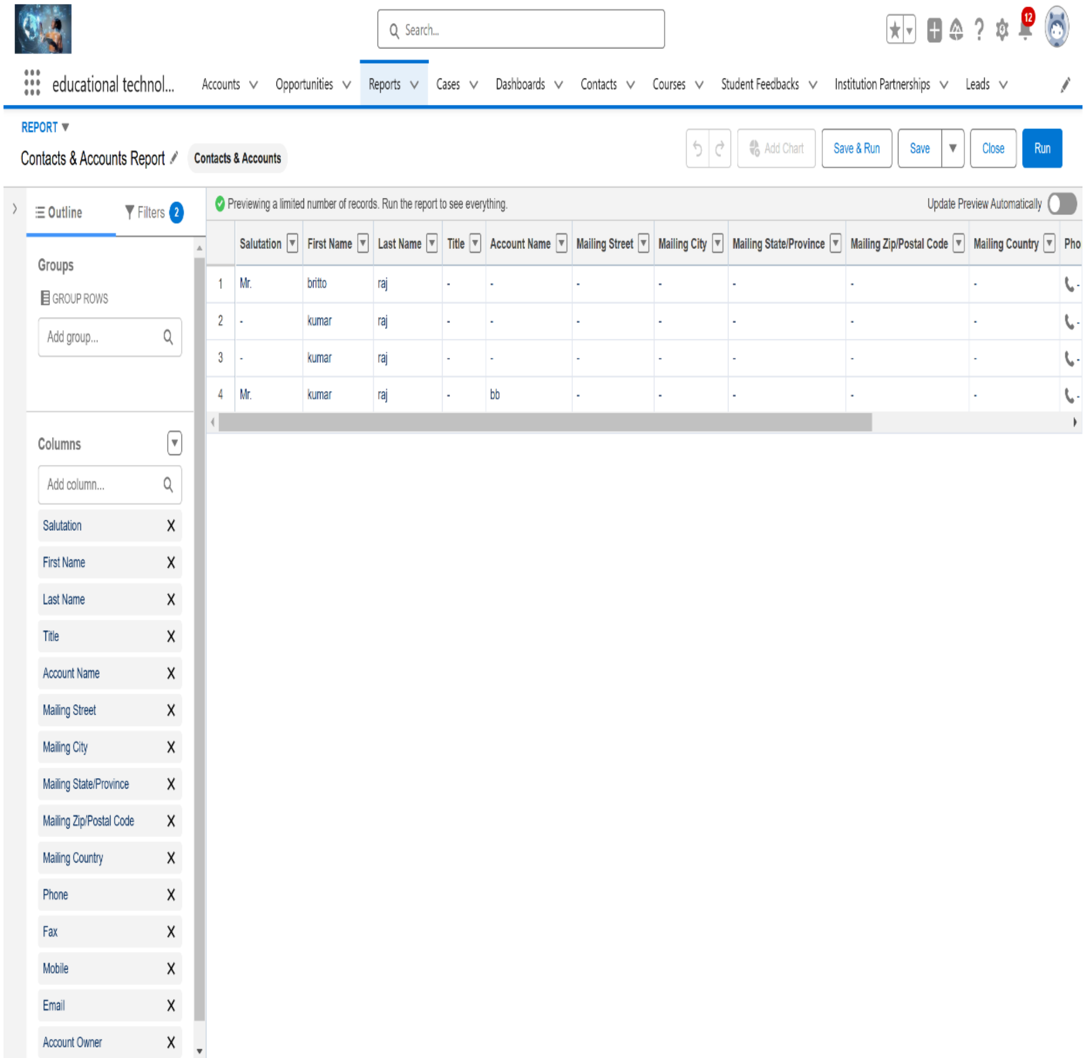
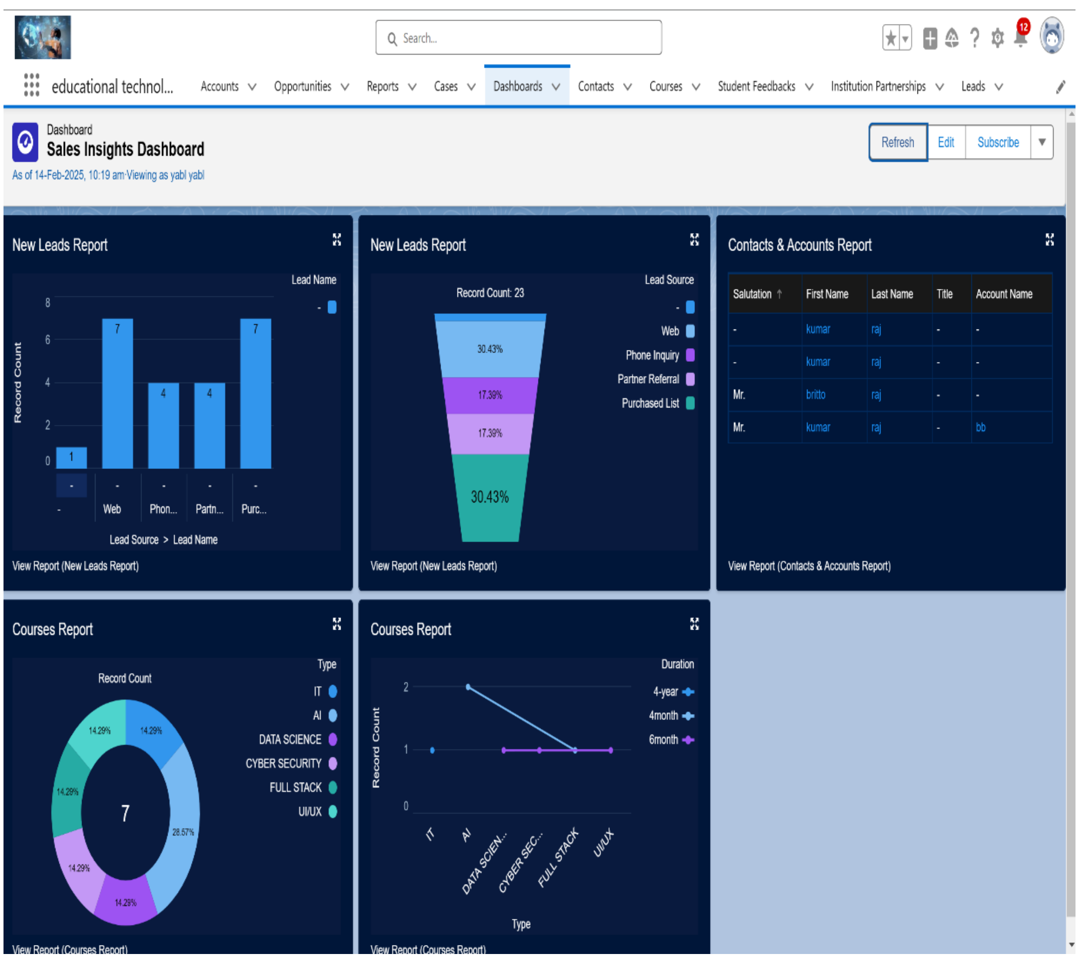
Accounts
Opportunities
Reports
Cases
Dashboards
Contacts
Courses
Student Feedbacks
Institution Partnerships
Leads
Report: Courses
Courses Report
Enable Field Editing
Edit
Record Count
IT
AI
DATA SCIENCE
CYBER SECURITY
FULL STACK
UI/UX
Type
Details (7 Rows)
Click an intersection in the table above to filter details.
Course: Last Activity Date | Course: Last Modified Date | Course: Created By | Course: Candidate Name
1 | - | 12/02/2025 | yabl yabl | dhanush
2 | - | 12/02/2025 | yabl yabl | shiva
3 | - | 12/02/2025 | yabl yabl | britto
4 | - | 12/02/2025 | yabl yabl | bharath
5 | - | 12/02/2025 | yabl yabl | jaya
6 | - | 12/02/2025 | yabl yabl | shakir
7 | - | 12/02/2025 | yabl yabl | rooban
Row Counts
Detail Rows
Subtotals
Grand Total
Stacked Summaries


educational technol...
Accounts
Opportunities
Reports
Cases
Dashboards
Contacts
Courses
Student Feedbacks
Institution Partnerships
Leads
REPORT
Contacts & Accounts Report
Contacts & Accounts
Add Chart
Save & Run
Save
Close
Run
Outline
Filters
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Groups
GROUP ROWS
Add group...
Columns
Add column...
Salutation
First Name
Last Name
Title
Account Name
Mailing Street
Mailing City
Mailing State/Province
Mailing Zip/Postal Code
Mailing Country
Phone
Fax
Mobile
Email
Account Owner
Mr.
britto
raj
kumar
bb

Dashboard Development

- A **Sales Insights Dashboard** was built to visualize key sales trends and track business performance in real-time.
- The dashboard included multiple data visualization components to enhance clarity and usability:
  - A **Pie Chart** was used to represent lead sources, allowing teams to identify the most effective acquisition channels at a glance.
  - A **Bar Chart** was implemented to illustrate the distribution of leads by status, highlighting the progression of leads from inquiry to conversion.
  - A **Line Chart** was incorporated to track **Sales Revenue Trends**, offering insights into revenue growth and fluctuations over time.
- The dashboard was configured to update dynamically, ensuring that sales and management teams have access to the most recent data without manual intervention.



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4. Salesforce Integration Guide - https://developer.salesforce.com/
5. Youtube- https://www.youtube.com/@salesforce
6. Chatgpt- https://chatgpt.com/c/67aefcdd-fb38-8007-a7b6-9e3482777b8c
7. EduTech Innovations Business Case Study (Internal Document)

Conclusion:

By implementing these Salesforce enhancements, EduTech Innovations will transform its CRM system into a powerful, automated, and insights-driven platform. These improvements will enable teams to better manage customer relationships, streamline sales processes, and gain real-time insights into business performance. The upgraded Salesforce system will help the company optimize operations, increase customer satisfaction, and drive sustained growth in the educational technology sector.