Project Name - Salesforce Implementation For EdTech Industry-

Project Overview
The objective of this project is to implement Salesforce, a leading Customer Relationship Management (CRM) platform, to streamline and enhance various operations within an EdTech company. This implementation aims to improve student enrollment processes, enhance customer relationship management, optimize marketing efforts, and provide insightful analytics to drive business decisions.

Project Goals
Improve Lead Management:

Capture and track leads efficiently.
Automate lead nurturing processes to convert prospects into students.
Enhance Customer Relationship Management:

Maintain comprehensive records of student interactions.
Provide personalized communication and support to students.
Optimize Marketing Campaigns:

Run targeted marketing campaigns based on data insights.
Track the effectiveness of different marketing channels and strategies.
Streamline Enrollment Processes:

Automate the student enrollment workflow.
Reduce manual effort and errors in the enrollment process.
Provide Analytics and Reporting:

Generate detailed reports on student demographics, enrollment trends, and course performance.
Use data analytics to drive strategic decisions and improve educational offerings.
30 day schedule for Salesofrce Intern -

OBJECTIVES AND TASKS FOR ILEARNINGS INTERNS

1 1-2 Introduction to Salesforce
Get familiar with Salesforce interface and key features. Complete basic tutorials and setup personal developer accounts.

1. Create a Developer Org with the name - iLearnings Test Org and implement all functionalities there.
2. Create an App - iLearnings
3. Create Custom Objects -

Employee

Clients

Trainer

4. Create below custom fields on below Employee Object -

Employee Name

Designation– text field

Salary – currency field

Incentives – currency field

Birthdate

Joining Date

Active – checkbox

Last Working Date

Address – text area

Payment Made – formula field – salary + Incentives

Payment date

Mode of Payment

Meeting Link

5. Create below fields on Trainer Object -

Trainer -

Fields - Trainer name text field

Trainer email

Trainer phone number

Address Text area

Specializations text area

Current Course Assigned

Commercials currency field

Payment Released currency field

Payment Date

Payment Mode

Advance Payment currency field

Active batch text field

Mode of training picklist field with values - off-line/ online

Client name look up field with client object

Birthdate date field

Joining date date field

Incentives currency field

#Create separate section for Payment fields

6. Create below fields on Client Object -

Client-

Client Name

Contact Number

Email id

Address

7. Create below fields on Campaign Object -

Campaign -

Create a field on campaign called – Webinar Date & Time

Webinar End Date & Time

Duration – Number field

Course Name

Perks – Text Area

Course Link – URL Field

8. Create Below Record Types on Leads
Business-to-Consumer (B2C)

Business-to-Business (B2B)

9. Create below custom fields on Leads -

Create a lookup field with Trainer object

Registration Date

Total Fees

Discount

Fees paid by Candidate

Pending Fees (Should be automatically calculated, Fees Paid By Candidate - Total Fees)

Batch Start Date

Add a picklist value in Lead Status - Registration Successful

3-4 Data Management
1. Learn about data import/export, data models, and object relationships.
2. Import 10 test records in Leads, Employee and Client object. Mention the tool used for Data import in project report.
3. Create a Campaign - iLearnings Webinar
4. Add Test Leads to Campaign - iLearnings Webinar
5. Create a web-to-Lead 'Enrollment Form' for capturing leads.

5-6 Email Templates & Alerts Create Email Templates for below scenerios to be used in Automations

7 Automations
Create automations for below criteria -

When web form is filled, an email should be sent to the sales team and the candidate, relevant to the course they have filled.

When a batch starts, along with the attachment of the training schedule.(email to be sent 1 day before of batch start date)

Send emails related to offers to all the Leads. (When a lead is created , send them buy 1 get 1 offer email).

Birthday emails for trainers and employees to be sent

2 8-9 Automations
CREATE FLOWS ON CAMPAIGN MEMBERS -

24 hours prior the webinar (Webinar Date on Campaign member) - Template – 1 Day before webinar

1-hour prior Webinar Date and Time - 1 hour before

5 mins before - we are live template

10-11 Automation Build complex flows to automate multi-step processes and enhance user interactions.-
1. 1 hour after the webinar on Campaign Members

2. 6 hours after the webinar On Campaign Members
3. 24 hours after the webinar On Campaign Members

12-13 Validation Rules Learn about validation rules and their role in ensuring data quality. Create validation rules to enforce below business logic-
If Registration Status = successful

Registration Date, Fees paid by Candidate, Batch Start Date is mandatory

14 Q&A Session Address any questions from the previous weeks' tasks.

15 Automation Troubleshooting Learn troubleshooting techniques for common issues in Salesforce automations. Practice identifying and resolving errors in automation processes. Do the QA of previous work done.
3 16-17 Development Create LWC Component - Delete Duplicate Attachments

18-19 Development
1. Trigger on Account to Create Default Contacts.
Scenario: Whenever an Account is created, automatically create a default contact where the number of contacts equals the number of employees.
Action:
Create a new Contact record with the following details:
First Name: “Default”
Last Name: “Contact”
Account: The newly created Account
Number of Employees (from the Account record)
Notes:
This ensures that each Account has a default contact associated with it.

2. Trigger on Opportunity to Enforce Future Closed Date:

Scenario: Prevent users from inserting Opportunities with past closed dates.
Action:
If the Opportunity's Closed Date is in the past, display the message: "Please enter a future Closed Date."
Notes:
This validation ensures that Opportunities are always associated with future dates.

3. Trigger on Product to Set Default Pricebook Entry:
Scenario: Set up a default Pricebook entry in the "Standard Pricebook" with a price of 15 for all products.
Action:
When a new Product is created, automatically create a Pricebook entry in the "Standard Pricebook" with the specified price.
Notes:
This simplifies the process for users by providing a default price.

4. Trigger on Contact to Update Account Name:
Scenario: When a Contact is created, concatenate the Contact's Last Name to the Account Name.
Action:
Update the Account Name by appending the Contact's Last Name.
Example: If Contact First Name is 'Andy' and Last Name is 'Cody', and the Account Name is 'Ricky', then the updated Account Name becomes 'Ricky Cody'.
Notes:
This ensures consistency between Contacts and their associated Accounts.

5. Enhanced Trigger on Contact to Handle Deletion:
Scenario: When a Contact is deleted, remove the Contact's Last Name from the Account field without deleting other Last names.
Action:
If a Contact is deleted, check if its Last Name is part of the Account Name.

If so, remove only the Contact's Last Name from the Account Name.
Notes:
This prevents orphaned Last Names in Account names.

20-21 Report & Dashboard Automations
Create automated reports and dashboards. Schedule report deliveries and dashboard refreshes.

1. Create report to calculate total Fees of candidates
2. Create Sales report to calculate monhtly revenue
3. Create Webinar Reports to track how many students registered in each webinar
4. Create Report on conversion ratio how many leads vs how many converted
5. Create 3 dashboards - Sales, trainers & Employee

22 Development
6. Trigger on Opportunity to Alert on Empty Opportunity Line Items:
Scenario: Alert the user when an Opportunity is being closed with no Opportunity Line Items.
Action:
If an Opportunity is being closed and has no associated Opportunity Line Items, display an alert.
Notes:
This ensures that users are aware of incomplete Opportunities.

7. Trigger on Opportunity to Increment Product Sales Count:
Scenario: Increment the "No of Products Sold" field on the Product standard object for each Opportunity Line Item when the Opportunity is closed as "Won."
Action:
For each Opportunity Line Item associated with a closed-won Opportunity, increment the "No of Products Sold" field on the related Product.
Notes:
This tracks the total products sold.

8. Trigger on Opportunity to Add Contacts to Opportunity Contact Roles:
Scenario: When creating an Opportunity, automatically add all Contacts associated with the same Account to the Opportunity's Contact Roles.
Action:
While creating an Opportunity, query for Contacts with the same Account as the Opportunity.
Add these Contacts to the Opportunity's Contact Roles.
Notes:
This streamlines Contact management for Opportunities.

9. Trigger on Campaign to Close Associated Opportunities:
Scenario: When a Campaign's status is "Completed," close all associated Opportunities.
Action:
For each Opportunity associated with the Campaign:
If the Opportunity has Line Items, close it as "Won."
If the Opportunity has no Line Items, close it as "Lost."
Send details of all associated Opportunities.
Notes:
This automates Opportunity closure based on Campaign status.

10. Trigger on Contact to Copy Billing Address from Account:
Scenario: If the checkbox "COPY ADDRESS FROM ACCOUNT" is true, copy the Account's Billing Address to the Contact's Mailing Address on insert and update.
Action:
If the checkbox is true:
Copy the Account's Billing Address fields (Street, City, State, Postal Code, Country) to the Contact's Mailing Address fields.
Notes:
This simplifies address management for Contacts.

23 Feedback Session Discuss the outcomes and feedback on the

tasks performed.
4 24-25 Campaign Automation Create and automate marketing campaigns to prompte our products within Salesforce. Track campaign performance and analyze results.

26-27 3rd Party Integration
1. Implement a salary calculator for employees using a third-party app
2. Enable option to call on Leads from Salesforce using a third-party app
3. Explore the possibility of payment integration
4. Consider all possible ways to create a seamless process for students.
5. Automated email for salary slips to be sent to employees with the Attachment.
6. Certificates to be sent to Leads after course completion

28 Final Presentation Prepare and present findings and recommendations for Salesforce efficiency at iLearnings.

29 Group Discussion Group discussion and feedback on the internship experience.

30 Internship Review Final review of the internship program and feedback collection. Discuss potential next steps and career advice for the interns.