



EduConsultPro

A CRM Application to Manage the Services offered by an Institution

Project Description:

This project is focused on streamlining the admission and consultation processes at EduConsultPro Institute, designed to address the challenges of efficiently managing student admissions, inquiries, and expert consulting services. The goal is to deliver a comprehensive solution by leveraging the Salesforce CRM platform to enhance operational efficiency and the user experience for both prospective students and admissions staff. Through this project, we aim to improve data accuracy, ensure a seamless admission process, and support the long-term objectives of EduConsultPro Institute in providing quality education and student services.

Objectives:

Business Goals:

1. **Streamline Admission Process:** Enable EduConsultPro Institute to manage admission applications efficiently, reducing processing time and improving accuracy.
2. **Enhance Student and Staff Experience:** Create a seamless, user-friendly interface for prospective students and admissions staff, reducing the complexity of the application and consulting process.
3. **Improve Data Management and Reporting:** Centralize admission, consulting, and case data within Salesforce CRM to facilitate detailed analysis of trends, performance, and outcomes.

Specific Outcomes:

1. **Admission Application Management:**
 - **Automated Application Capture:** Collect and store comprehensive admission application data, including personal details, academic history, and qualifications, directly in Salesforce CRM.
 - **Automated Notifications:** Generate email confirmations for students upon successful application submission.
2. **Approval Process for Consulting Requests:**
 - **Automated Approval Flow:** Implement a Salesforce-based approval process to streamline consulting requests with automatic submission and email alerts for status updates (approval or rejection).
 - **Email Notifications:** Notify students promptly regarding their consulting

request status.

3. Consulting Services Management:

- **Consulting Request Capture:** Enable students to submit consulting service requests via the website, capturing preferences and expertise areas in Salesforce.
- **Notification and Scheduling:** Notify consultants of new requests and enable them to manage appointments with scheduling options within Salesforce.

4. Immigration Case Management:

- **Centralized Case Management:** Capture and store immigration case details in Salesforce for easy access and processing by immigration agents.
- **Automated Alerts and Updates:** Notify agents of new cases and enable real-time updates on case status (e.g., open, in progress, closed)

Salesforce Key Features and Concepts Utilized

- **Centralized Data Management with Salesforce CRM:**
Unified data storage for admissions, consulting requests, and immigration cases ensures streamlined access and management by EduConsultPro staff.
- **Automation through Screen Flows and Process Builder:**
Screen flows guide users through admissions and consulting processes, while Process Builder automates approvals and triggers notifications, reducing manual effort.
- **Approval Processes for Consulting Requests:**
Automated approval routing for consulting requests, including email alerts for students on approval or rejection, simplifies the review and response process.
- **Custom Reporting and Dashboards:**
Real-time reports and dashboards offer insights into metrics such as application rates and consultant availability, supporting data-driven decisions.

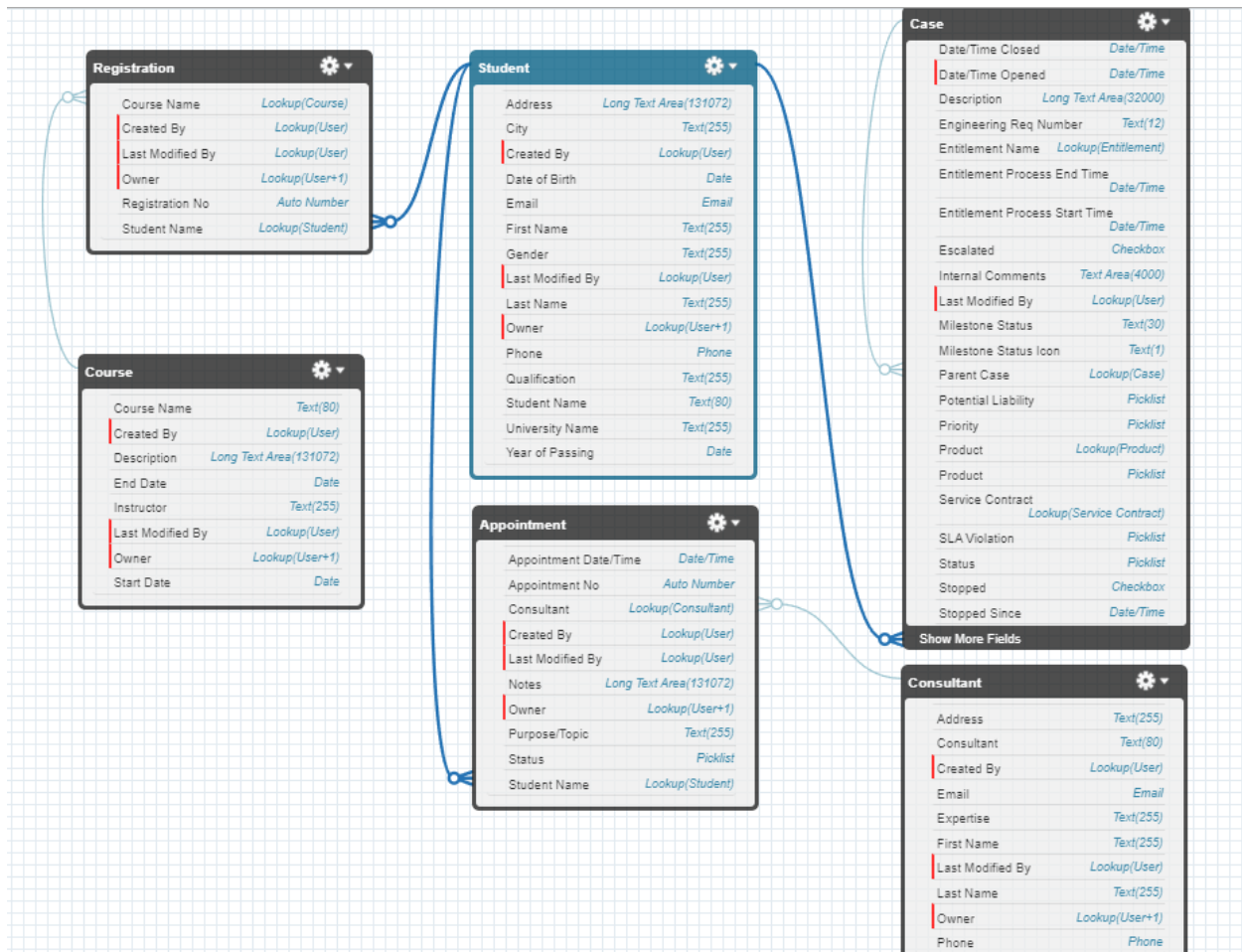
Detailed Steps to Solution Design

1. Requirement Analysis and Stakeholder Meetings

- Gather detailed requirements from EduConsultPro stakeholders to understand the existing challenges in admissions, consulting, and immigration processes.
- Document specific requirements, including data capture, reporting needs, notification flows, and approval conditions.

- Define KPIs (Key Performance Indicators) to measure the success of the implementation, such as reduced processing time, improved response rates, or higher enrollment figures.

2. Define Data Model



- **Student Object:** Capture basic student details, academic history, contact information, and application status.
- **Appointment Object:** Store appointment information, including program details, status, and appointment date.
- **Consultant Object:** Record consulting preferences, requested expertise, and consultant availability.
- **Case Object:** Track each case with information such as case type, status, assigned agent, and document management.
- **Registration Object:** keep the information of Student and course they registered in.

- **Course Object:** Store information of course such as name, end date and instructor.
- Create necessary relationships (e.g., lookup or master-detail) among objects to link student records with admissions, consulting requests, and immigration cases.

Student - Skill Wallet | SI-7297-1730972736 | Congratulations: You Have Been... | Project Template.pdf - Google | Magical Pairs Calculation | Recently Viewed | Student | Search this list...

EduConsultPro | Student | Course | Consultant | Appointment | Cases | Registrations

Student Recently Viewed | New | Change Owner | Import | Assign Label | Search this list...

5 items • Updated a few seconds ago

	Student	Student Name	First Name	Last Name	Date of Birth	Email	Gender	Address	City	Phone
1	<input type="checkbox"/> a04N50000000LCJG	tanu	tanu	singh	06/11/2024	tanu123@gmail.com	female	119-120 Bithal Nagar, Lalghati, Bhopal	Bhopal	09131422395
2	<input type="checkbox"/> a04N50000000LCEH	rohan	rohan	sharma	09/11/2005	rohan123@gmail.com	male	119-120 Bithal Nagar, Lalghati, Bhopal	Bhopal	8554699371
3	<input type="checkbox"/> a04N50000000LC3R	ravi	ravi	shah	15/11/2007	ravi123@gmail.com	male	119-120 Bithal Nagar, Lalghati, Bhopal	Bhopal	9131422300
4	<input type="checkbox"/> a04N50000000L60n	raj	Raj	kumar	06/11/2006	raj123@gmail.com	male	119-120 Bithal Nagar, Lalghati, Bhopal	Bhopal	9131422394
5	<input type="checkbox"/> a04N50000000KD8T									

Windows taskbar: 31°C Haze, 04:03 PM, 07-11-2024

3. Automation Design

- **Screen Flow for Admissions:**
 - Design flows to guide admissions staff through form completion, application review, and status updates.

Student - Skill Wallet | SI-7297-1730972736 | Magical Pairs Calculation | Recently Viewed | Student | Sales | Flows | Salesforce | EduConsultPro Flow - V1

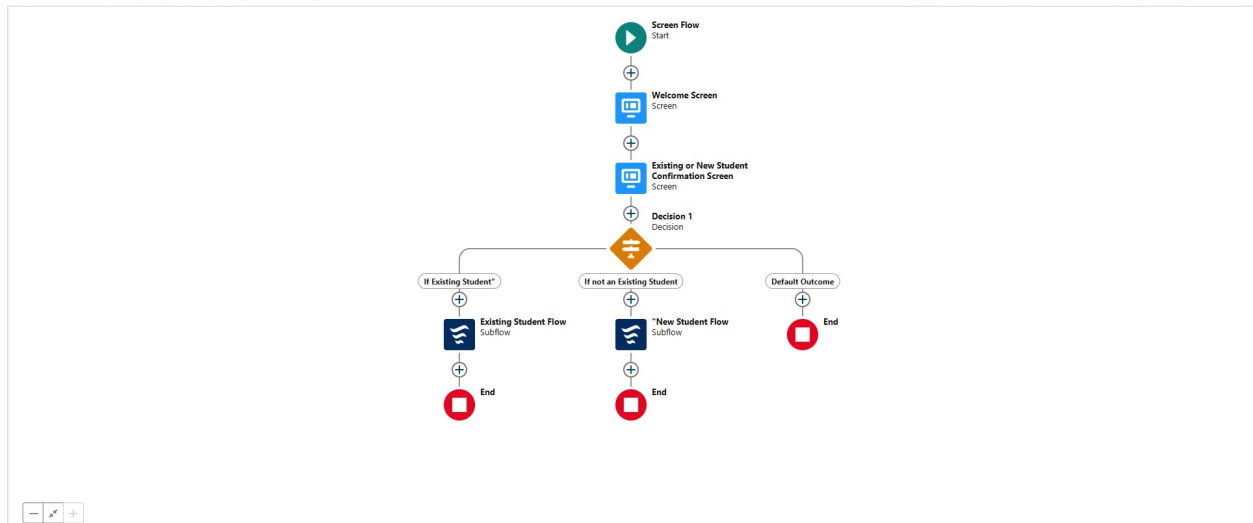
airtel38-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301NS00000IB3PIYA

Problems - LeetCode | CodingBat Java Ana... | Striver's SDE Sheet... | Study - Physics Wall... | [4th year] Roadmap... | Roadmap | Non Verbal Reason... | My learning | Udemy | Checkout

Flow Builder | EduConsultPro Flow - V1

Select Elements | Auto-Layout

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Student - Skill Wallet | SI-7297-1730972736 | Magical Pairs Calculation | Recently Viewed | Student | Sales | Flows | Salesforce | EduConsultPro Student Flow - V4

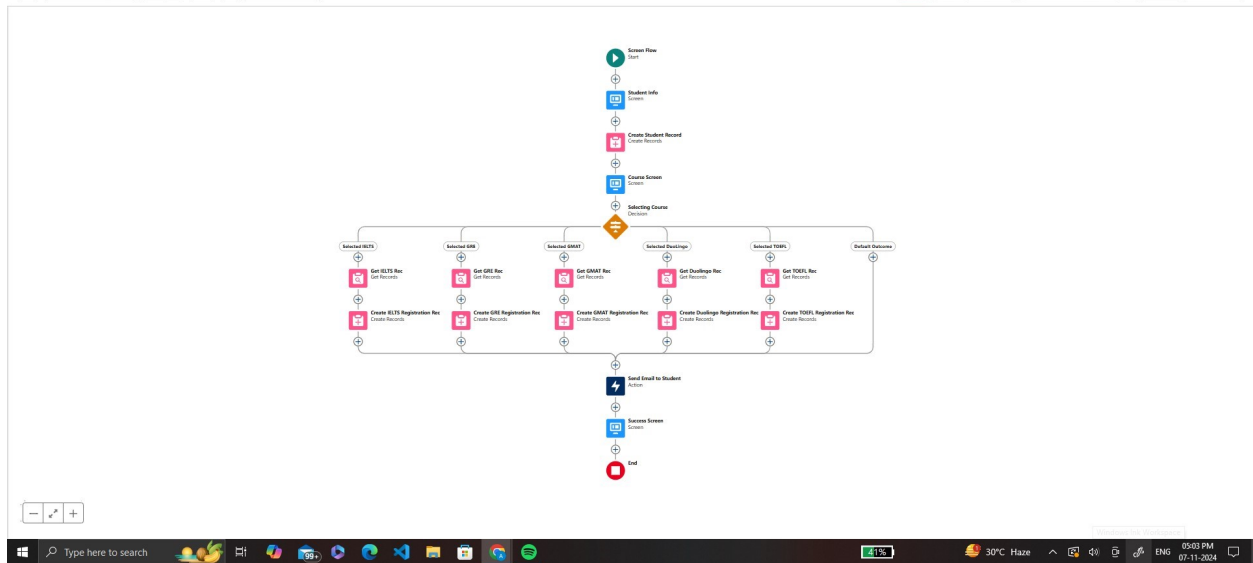
airtel38-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301NS00000ILFpwVAG

Problems - LeetCode | CodingBat Java Ana... | Striver's SDE Sheet... | Study - Physics Wall... | [4th year] Roadmap... | Roadmap | Non Verbal Reason... | My learning | Udemy | Checkout

Flow Builder | EduConsultPro Student Flow - V4

Select Elements | Auto-Layout

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The image displays two screenshots of the Salesforce Flow Builder interface, showing the configuration of two different flows.

Top Screenshot: EduConsultPro Existing Student Flow - V1

- Flow Name:** EduConsultPro Existing Student Flow - V1
- Start:** Screen Flow
- Steps:**
 - Get Student Info (Screen)
 - Get Bar (Get Records)
 - Display Student Detail (Screen)
 - Appointment or Case Decision (Decision)
- Branches:**
 - Appointment:** Appointment Booking Screen (Screen) → Get Consultant Bar (Get Records) → Create Appointment (Create Records) → Confirmation Screen (Screen) → End
 - Case:** Create Student Case (Screen) → End
 - Default Outcome:** End

Bottom Screenshot: EduConsultPro Approval Flow - V2

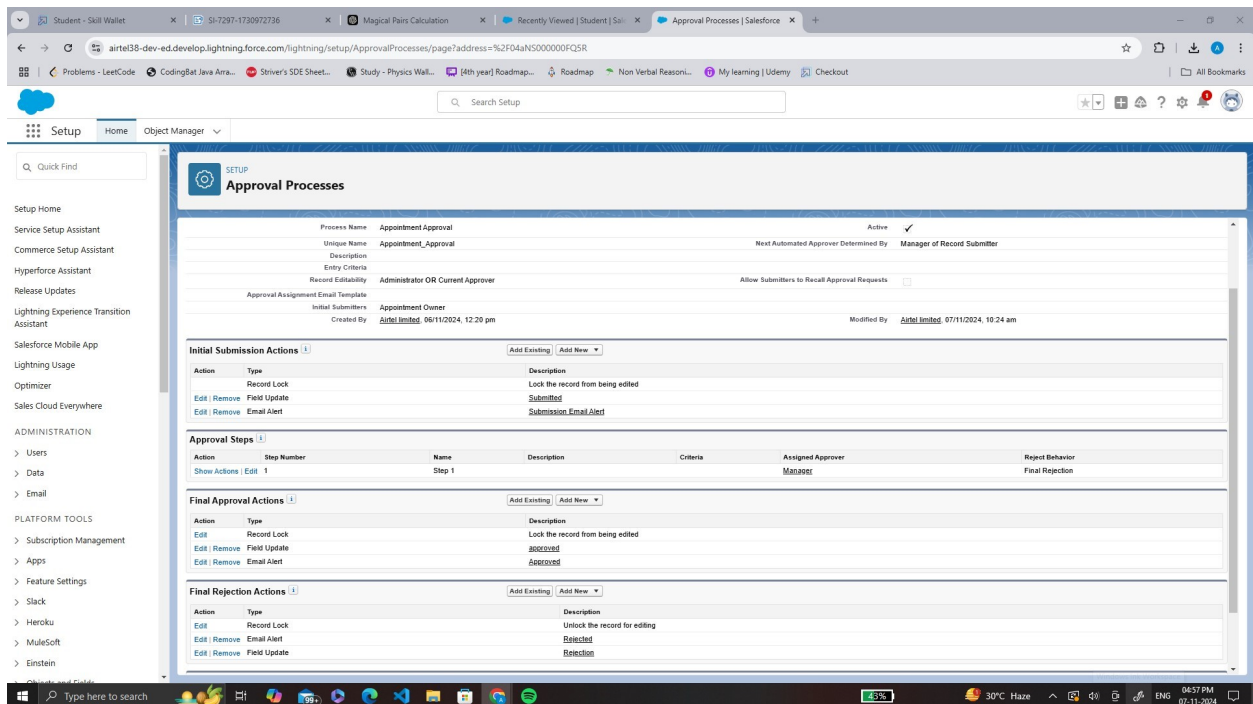
- Flow Name:** EduConsultPro Approval Flow - V2
- Start:** Record-Triggered Flow Start
- Steps:**
 - Run Immediately
 - Approval SubFlow (Action)
 - End

Right Panel: Submit for Approval Configuration

- Action:** Submit for Approval (submit-submit)
- Label:** Approval SubFlow
- API Name:** Approval_SubFlow
- Description:**
- Set Input Values for the Selected Action:**
 - Record ID:** Triggering Appointment_c → Record ID
 - Approval Process Name Or ID:** Not included
 - Next Approver IDs:** Not included
 - Skip Entry Criteria:** Not included
 - Submission Comments:** Not included

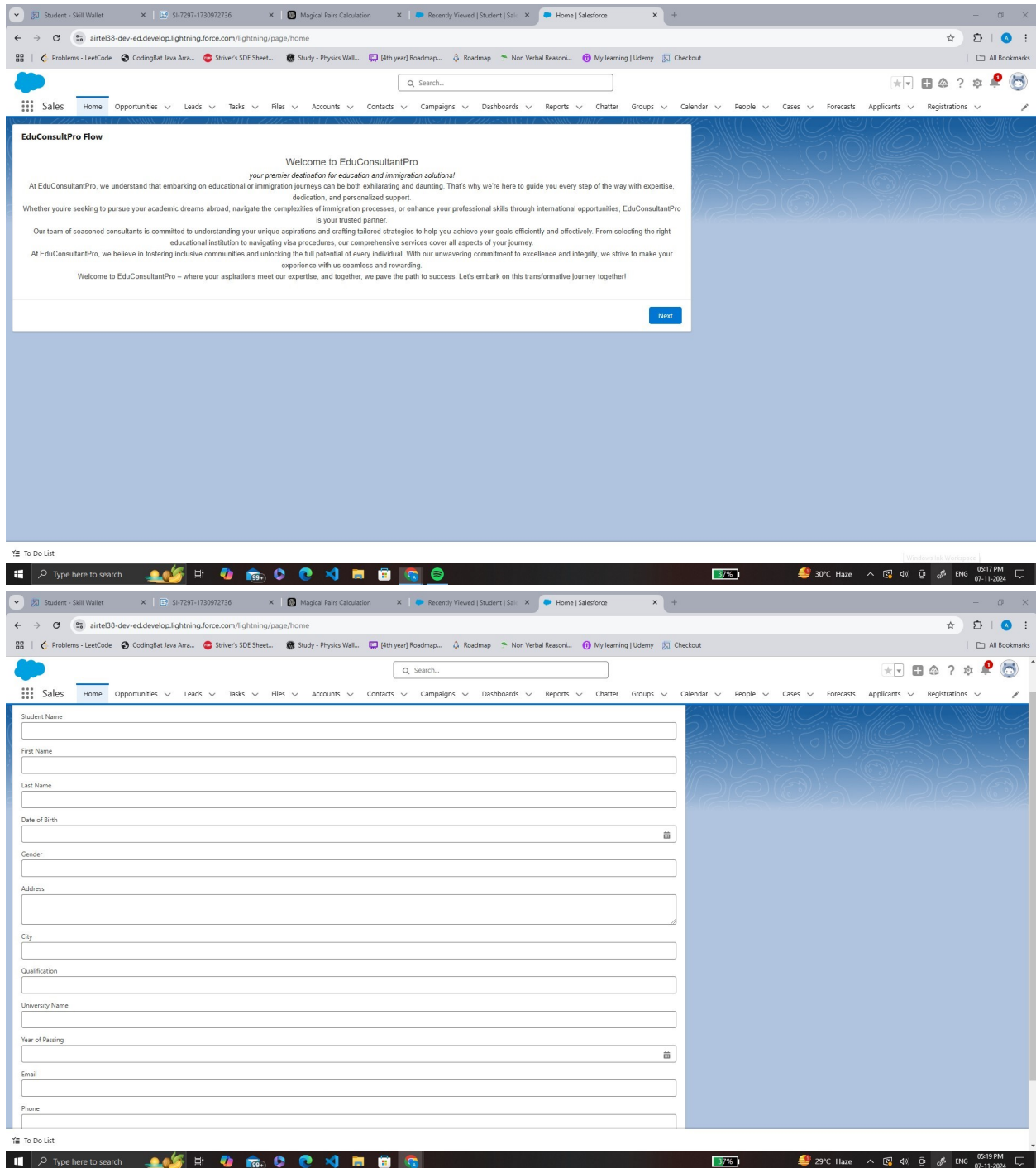
● Approval Process:

- Create a consulting request approval workflow, which routes requests to the appropriate consultant.
- Configure automated notifications for each approval/rejection action.



4. Implement User Interface and Experience (UX)

- **Student Portal Integration:**
 - Allow students to submit admissions, consulting, and immigration requests via the institute's portal, integrating forms with Salesforce objects.



- **Staff Screen Flows:**
 - Design flows within Salesforce for admissions and consulting staff to efficiently manage records and respond to student inquiries.

Student - Skill Wallet x SI-7297-1730972736 x Congratulations! You Have Re... x Project Template.pdf - Google x Magical Pairs Calculation x Recently Viewed | Student | Sai x

airtel38-dev-ed.develop.lightning.force.com/lightning/o/Student_c/list?filterName=_Recent

Problems - LeetCode CodingBat Java Ana... Striver's SDE Sheet... Study - Physics Wall... [4th year] Roadmap... Roadmap Non Verbal Reasoni... My learning | Udemmy Checkout

EduConsultPro Student Course Consultant Appointment Cases Registrations

Student Recently Viewed

New Change Owner Import Assign Label

5 items • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Student	Student Name	First Name	Last Name	Date of Birth	Email	Gender	Address	City	Phone
<input type="checkbox"/>	a04N5000000LCKQ	tanu	tanu	singh	06/11/2024	tanu123@gmail.com	female	119-120 Bithal Nagar,Lalghati ,Bhopal	Bhopal	09131422395
<input type="checkbox"/>	a04N5000000LCEH	rohan	rohan	sharma	09/11/2005	rohan123@gmail.com	male	119-120 Bithal Nagar,Lalghati ,Bhopal	Bhopal	8654699371
<input type="checkbox"/>	a04N5000000LC3R	ravi	ravi	shah	15/11/2007	ravi123@gmail.com	male	119-120 Bithal Nagar,Lalghati ,Bhopal	Bhopal	9131422300
<input type="checkbox"/>	a04N5000000L60n	raj	Raj	kumar	08/11/2006	raj123@gmail.com	male	119-120 Bithal Nagar,Lalghati ,Bhopal	Bhopal	9131422394
<input type="checkbox"/>	a04N5000000KDBT									

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- **Consultant Interface:**

- Provide consultants with a clear interface for viewing and managing their consulting appointments, complete with a calendar view for scheduling.

Student - Skill Wallet x SI-7297-1730972736 x Magical Pairs Calculation x Recently Viewed | Student | Sai x Home | Salesforce x

airtel38-dev-ed.develop.lightning.force.com/lightning/page/home

Problems - LeetCode CodingBat Java Ana... Striver's SDE Sheet... Study - Physics Wall... [4th year] Roadmap... Roadmap Non Verbal Reasoni... My learning | Udemmy Checkout

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases Forecasts Applicants Registrations

EduConsultPro Flow

Appointment Date/Time

Date 08/11/2024 Time 12:00 pm

Notes

gfhg

Purpose/Topic

discussion

Consultant

rajesh jain

Previous Next

To Do List

Type here to search

Result

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Testing and Validation

Unit Testing

- Objective: Verify individual components (e.g., objects, workflows, and automation rules) function as expected.
- Actions:
 - Test individual record creation, field updates, and object relationships (e.g., linking a Student to an Admission Application).
 - Validate each automation (e.g., Process Builder, Flow, and Approval Processes) triggers accurately with correct conditions and outputs.
 - Confirm that emails, notifications, and alerts are sent as per configured criteria.

Integration Testing

- Objective: Ensure seamless data flow between Salesforce and the external student portal.
- Actions:
 - Test data synchronization to confirm student admissions, consulting, and immigration requests submitted on the portal are correctly captured in Salesforce.
 - Validate API connections for real-time updates between Salesforce and the student portal.
 - Test the accuracy of data mapping, especially for complex fields like consulting preferences and case status.

Functional Testing

- Objective: Verify all functionalities work as specified in the requirements.
- Actions:
 - Test the admissions and consulting flows from end-to-end: submit a form, verify automation, and simulate various approval/rejection conditions.
 - Verify that approval processes (e.g., consulting request approvals) perform correctly, checking the routing to the appropriate consultants.
 - Test field validations, mandatory fields, picklists, and record types to ensure compliance with data input requirements.

Layout and Design Testing

- Objective: Ensure that the interface follows consistent layout, design, and branding guidelines.
- Actions:
 - Verify the alignment, spacing, and overall structure of elements on each screen (e.g., form fields, buttons, navigation).
 - Confirm that components are displayed consistently across different devices and browsers (responsive testing).
 - Check that font sizes, colors, and icons match design specifications for a professional look and feel.

Navigation and Workflow Testing

- Objective: Confirm the ease of navigation through the user flows for admissions, consulting, and case management.
- Actions:
 - Test navigation paths from start to finish, ensuring each action button (e.g., Next, Previous, Submit) leads to the correct screen.
 - Verify breadcrumbs or indicators to show users their current step within multi-step processes, such as application submission.
 - Ensure users can navigate back and forth in forms without losing data unless explicitly required.

Student - Skill Wallet | SI-7297-1730972736 | Magical Pairs Calculation | Recently Viewed | Student | Salesforce | EduConsultPro Student Flow - V4

airtel38-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301NS00000LFPwVAG

Problems - LeetCode | CodingBat Java Ana... | Striver's SDE Sheet... | Study - Physics Wall... | [4th year] Roadmap... | Roadmap | Non Verbal Reason... | My learning | Udemy | Checkout | All Bookmarks

Flow Builder | EduConsultPro Student Flow - V4

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Select Elements | Auto-Layout

Send Email

*Label
Send Email to Student

*API Name
Send_Email_to_Student

Description

Send Email
emailSimple-emailSimple

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

Set Input Values for the Selected Action

☐ Add Threading Token to Body | Not included

☐ Add Threading Token to Subject | Not included

☐ BCC Recipient Address List | Not included

☒ Body | Included
StuRegistrationEmailTextTemplate X

☐ CC Recipient Address List | Not included

EduConsultantPro Existing Student Flow

Appointment Date/Time
Date | Time

Notes

Purpose/Topic

Consultant
Search Consultant...

Previous | Next

Debug Details

Label: Enter Student Email
Value at run time: raj123@gmail.com

Selected Navigation Button: NEXT

GET RECORDS: Get Rec
Find all Student_c records where:
Student_Name_c Equals (Enter_Student_Name)
(raj)
AND Email_c Equals (Enter_Student_Email)
(raj123@gmail.com)
Store the values of these fields in Get_Rec Id
Result
Successfully found records.

Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.

SCREEN: Display Student detail
Textbox: How_may_I_Help_you
Label: How may I Help you
Value at run time: book an appointment

Selected Navigation Button: NEXT

DECISION: Appointment or Case
Outcome executed: Appointment
Outcome conditions:
(How_may_I_Help_you) (book an appointment)
Equals (Book_an_Appointment) (book an appointment)
All conditions must be true (AND)

Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.

Key Scenarios Addressed by Salesforce in the Implementation Project

- **Admission Application Management:** Automating the collection, storage, and processing of admission applications from prospective students. This includes managing application forms, personal details, academic history, and generating

relevant reports.

- **Approval Process for Consulting Requests:** Automating the approval workflow for consulting requests, including email notifications to students, automatic submission of requests, and ensuring timely approvals/rejections by the admissions staff.
- **Consulting Services Management:** Enabling prospective students to request consulting services, capturing preferences and areas of expertise needed, and allowing consultants to manage and schedule appointments efficiently within the Salesforce interface.
- **Immigration Case Management:** Managing immigration-related cases from students, with case submission forms, document storage, automated notifications, and real-time tracking of case statuses. This includes case management and coordination among immigration agents and students.
- **Reporting and Analytics:** Providing real-time insights on application metrics, trends, and performance with dashboards and reports for the admissions team to analyze acceptance rates, processing times, and other key performance indicators (KPIs).

Conclusion

The EduConsultPro Institute project successfully leveraged Salesforce to streamline key processes such as admission application management, consulting services, and immigration case handling. By automating form submissions, approval workflows, and notifications, the project enhanced operational efficiency for both prospective students and staff. The integration of real-time tracking, reporting, and data-driven insights further optimized decision-making. This implementation has transformed the way EduConsultPro manages student inquiries and service requests, providing a seamless, transparent experience while improving internal workflows and overall productivity.