# SALESFORCE VIRTUAL INTERNSHIP

#### **SMARTINTERNZ**

A CRM Application to Manage the Services offered by an Institution By

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## **Project Abstract:**

This project focuses on developing a CRM (Customer Relationship Management) application for "EduConsultPro" Institute, an educational institution offering a range of programs.

The aim is to streamline and enhance the student admission process by implementing a Salesforce CRM solution. The CRM system will manage various stages of the admission process, from handling student inquiries to processing applications and scheduling appointments. By automating key workflows such as user management, application approval processes, and case management, the system will provide a seamless experience for both prospective students and admissions staff.

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# INTRODUCTION

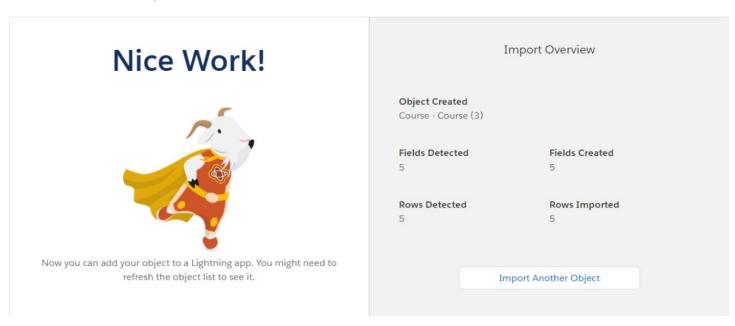
# A CRM Application to Manage the Services offered by an Institution

EduConsultPro Institute is a leading educational institution offering a variety of courses and programs in diverse fields. With a growing number of prospective students seeking admission each year, the institute faces challenges in managing the admission process, student enquiries, and expert consulting services efficiently. To address these challenges, EduConsultPro Institute decides to leverage Salesforce CRM to streamline the admission process and enhance the overall experience for both students and admissions staff. The use case focuses on the admission process for prospective students interested in enrolling in courses and programs offered by EduConsultPro Institute. The goal is to provide a seamless and transparent experience for students while enabling admissions staff to efficiently review and process admission applications, student enquiries, and case management.

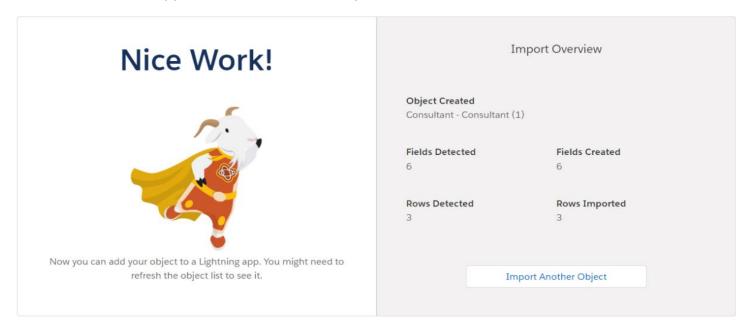
### **Activity 1:** : Create Objects From Spreadsheet

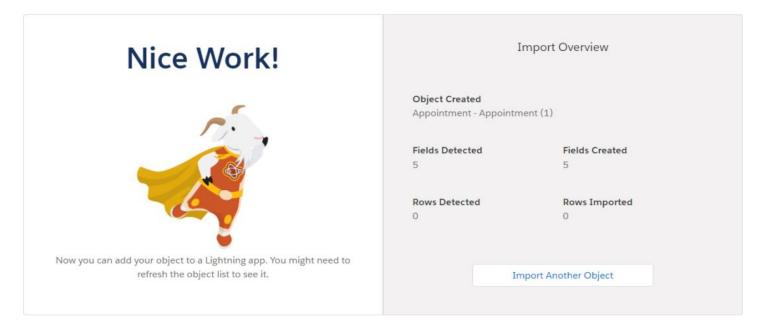
Directly Creating Objects from a Spreadsheet in Salesforce

#### **Create Course Object**



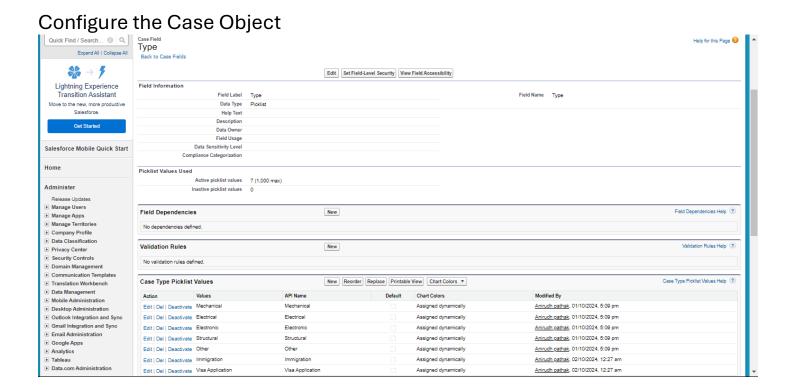
#### Create Consultant, Appointment and Student Objects

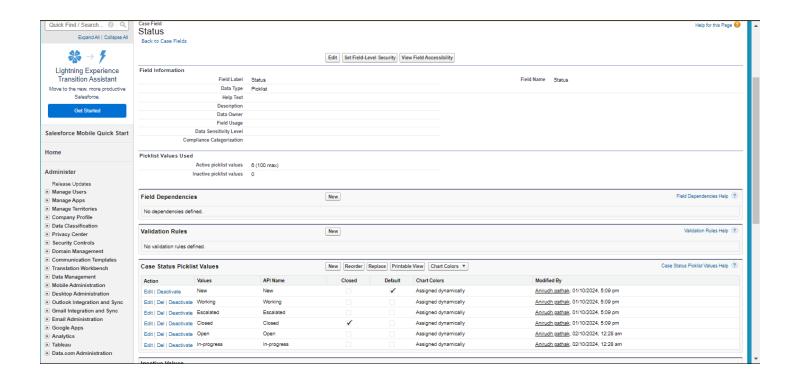




#### Create Relationship among the objects

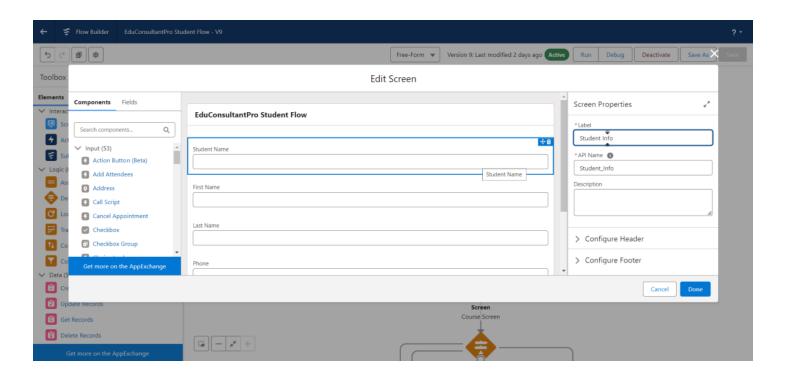
- 1. Create a lookup between appointment and student, appointment and consultant.
- 2. Create an object to store the information student and course details with the name Registration.
- 3. Also create a lookup between student and case to store the student queries for immigration or visa application.
- 4. The data model should be similar to the below Data Model with fields & relationships.

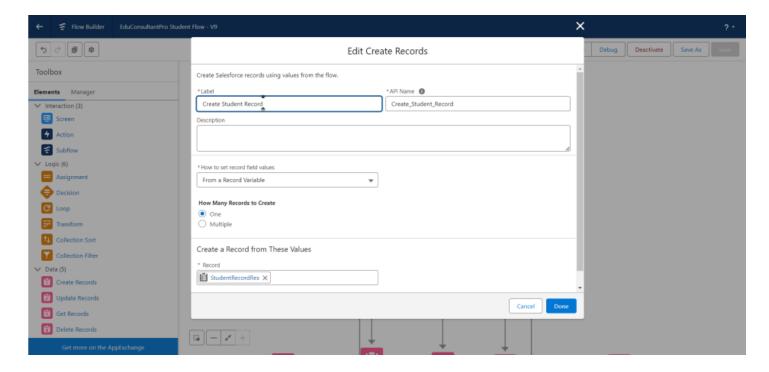




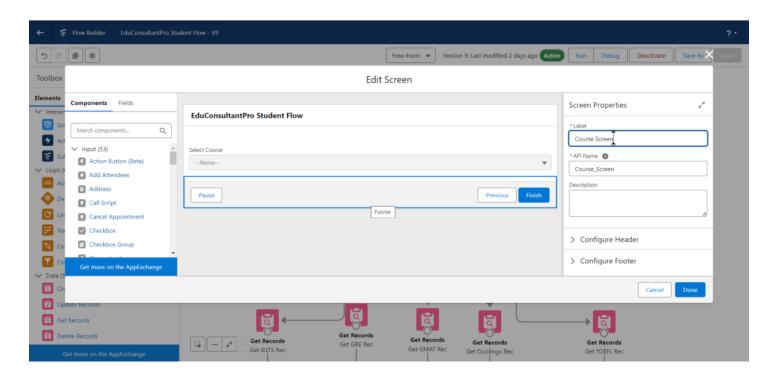
#### Activity 2: Create a ScreenFlow for Student Admission Application process.

#### Add Screen Element

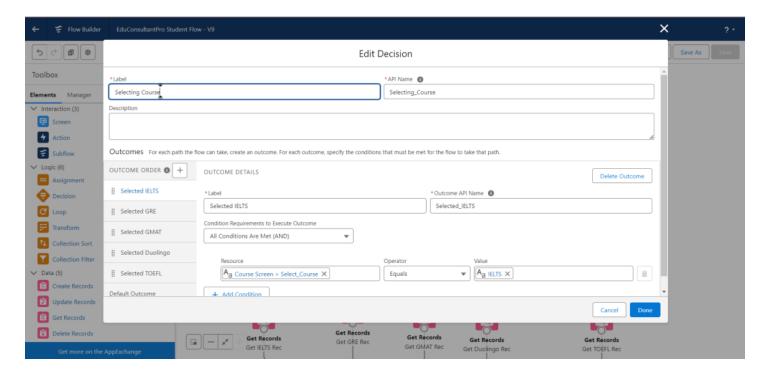




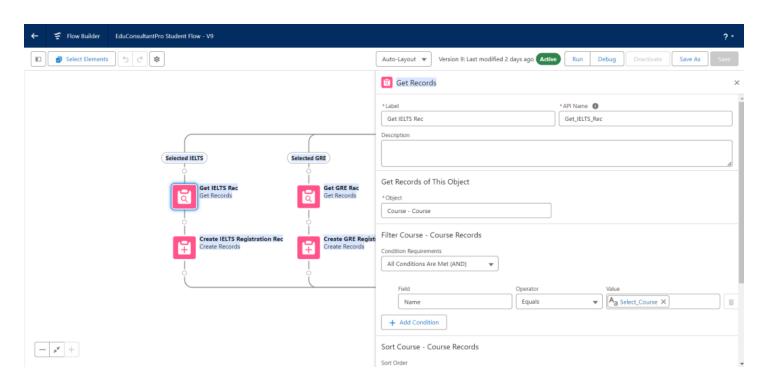
#### Add Screen Element

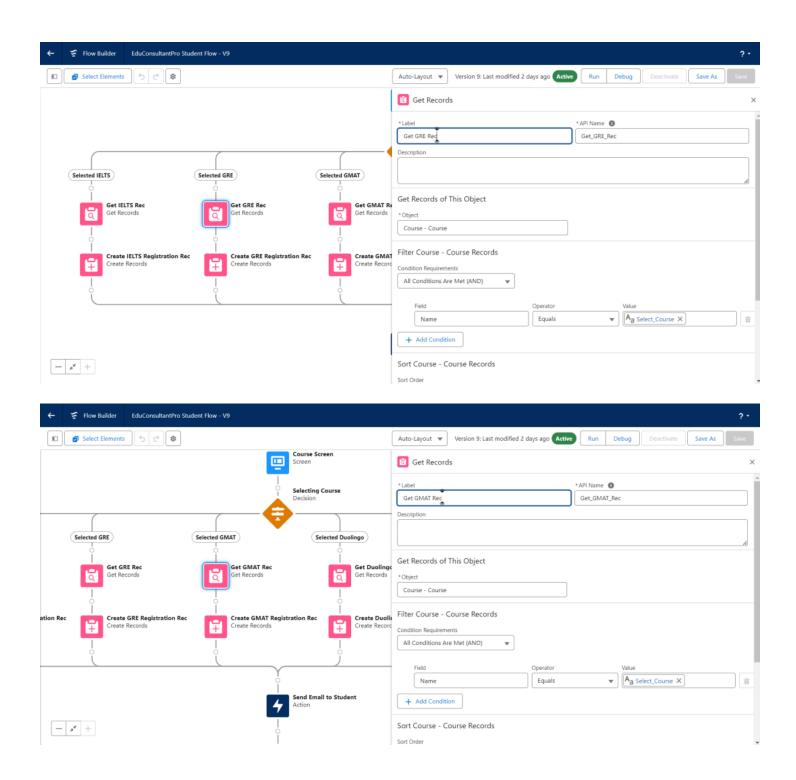


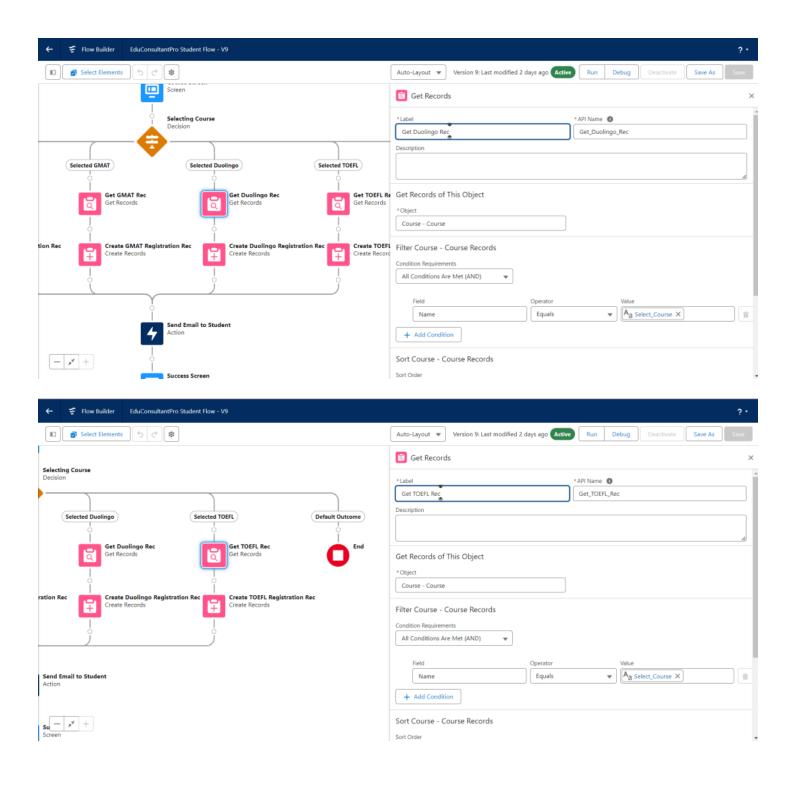
#### Add Decision Element

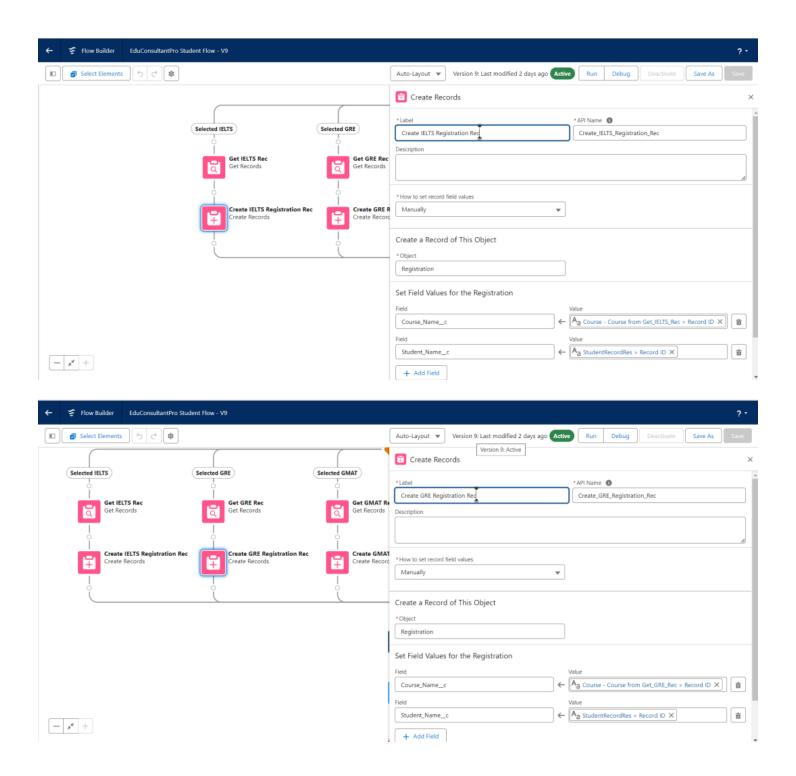


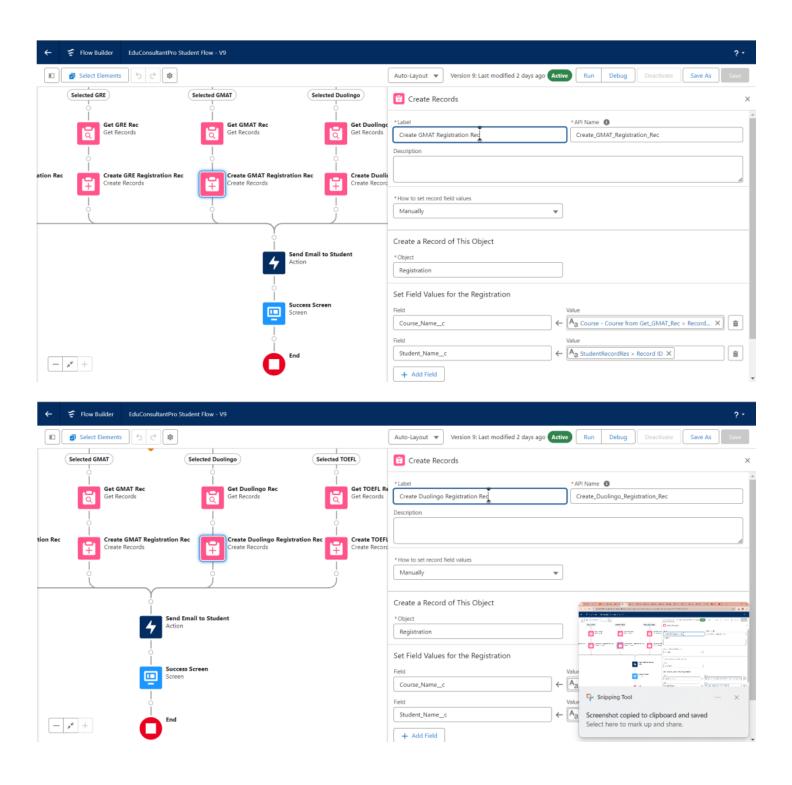
#### Add GET Record Element

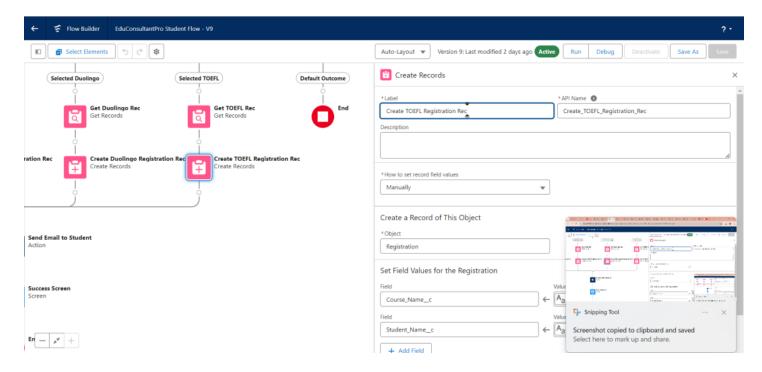




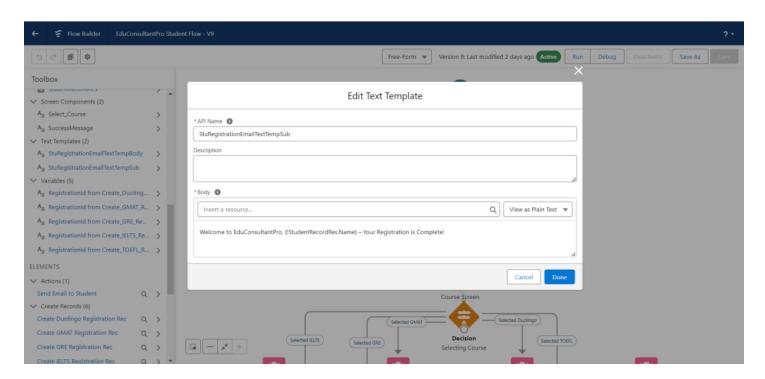


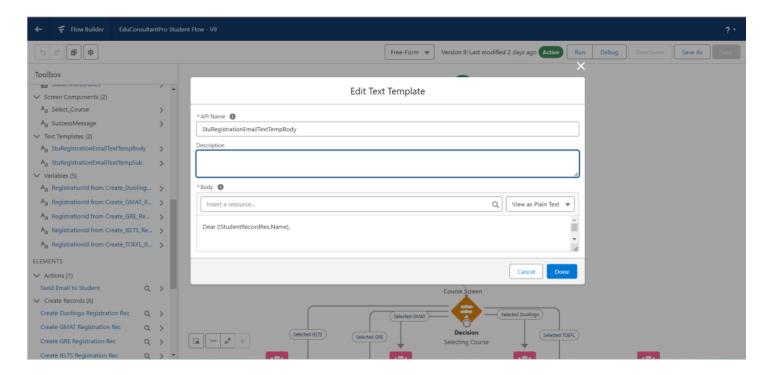




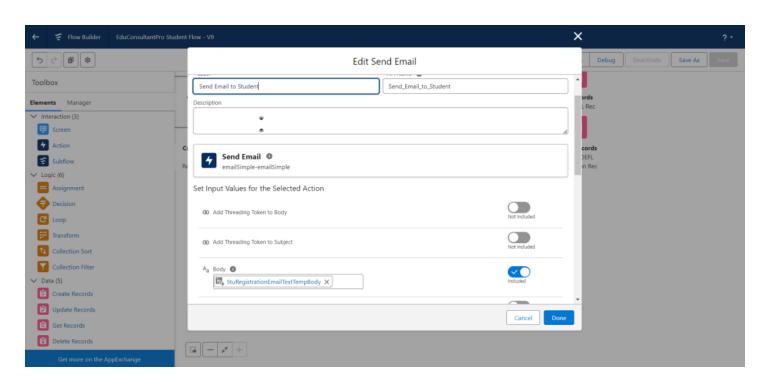


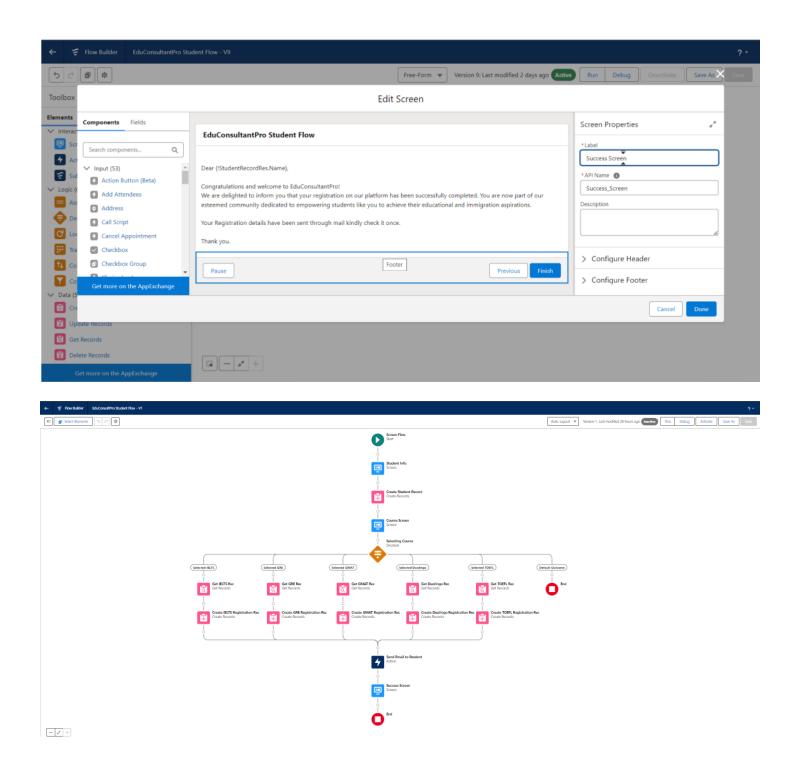
#### Create Email Text Template Variables for email body and subject





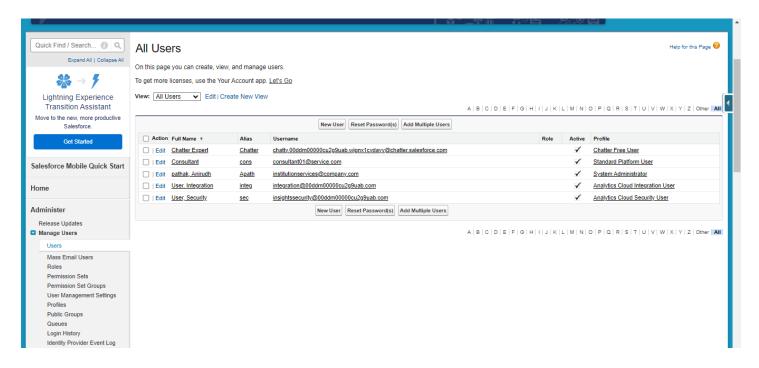
#### Add an Action Element



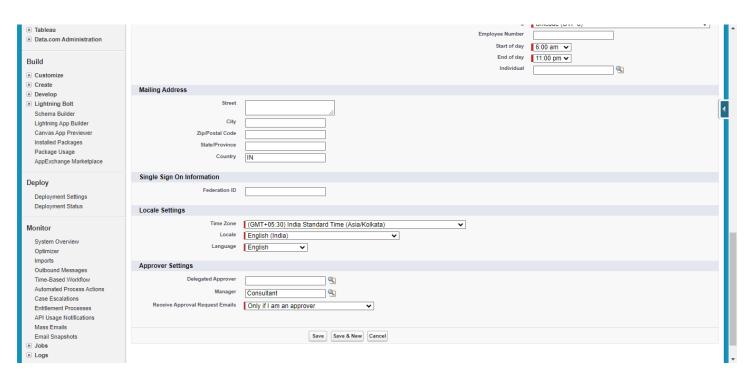


# **ACTIVITY 3:** Create Users

#### User

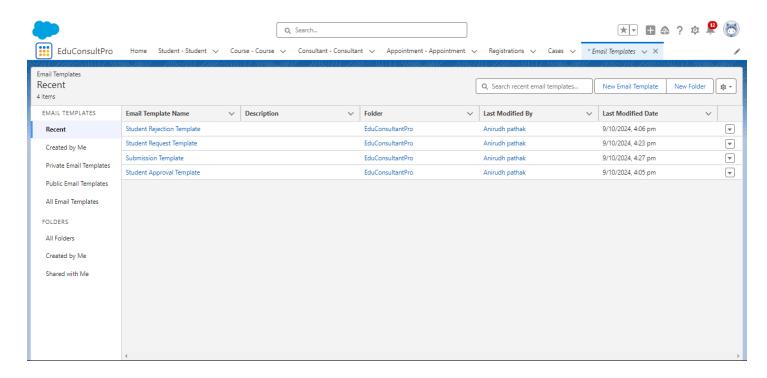


#### Configure the User Settings

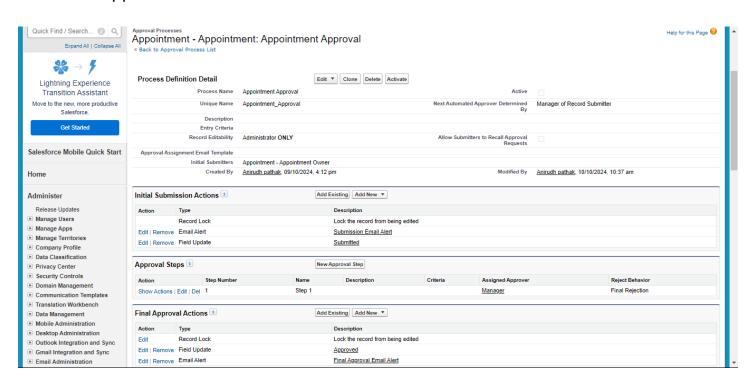


**ACTIVITY 4:** Create an Approval Process for Property Object

#### Create an Email Template

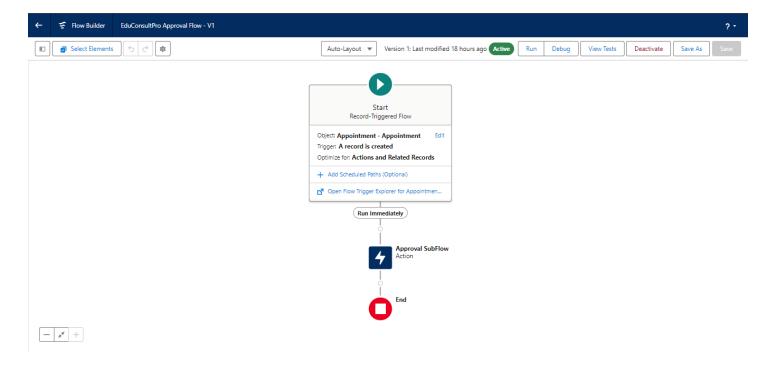


#### Create an Approval Process

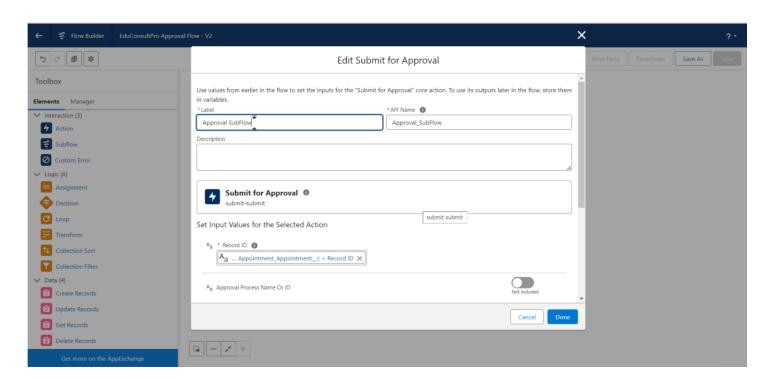


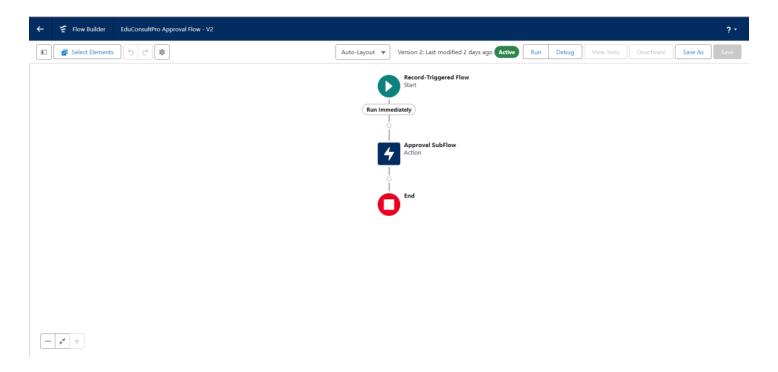
### **ACTIVITY 5:** Create a Record Triggered Flow

Configure the Start Element



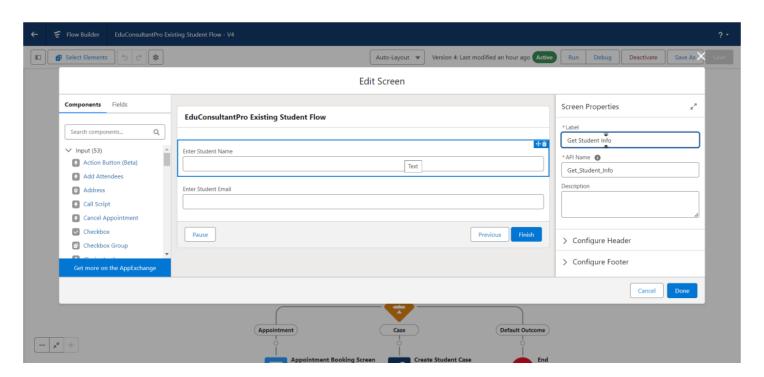
#### Add an Action Element

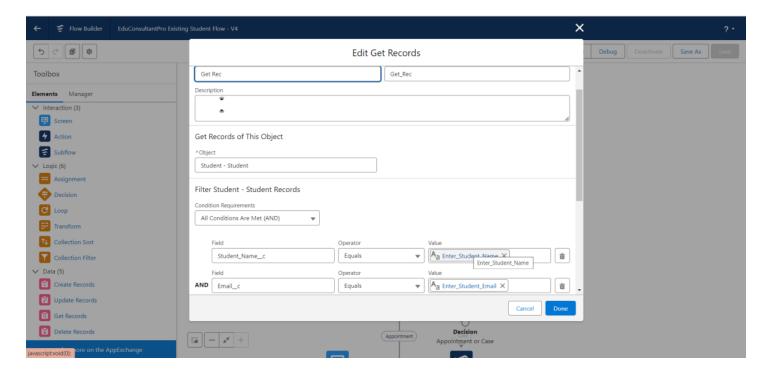




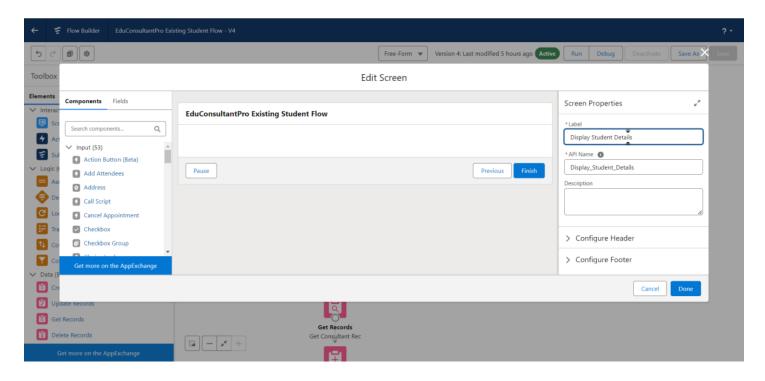
# **ACTIVITY 6:** Create a ScreenFlow for Existing Student to Book an Appointment

#### Add Screen Element

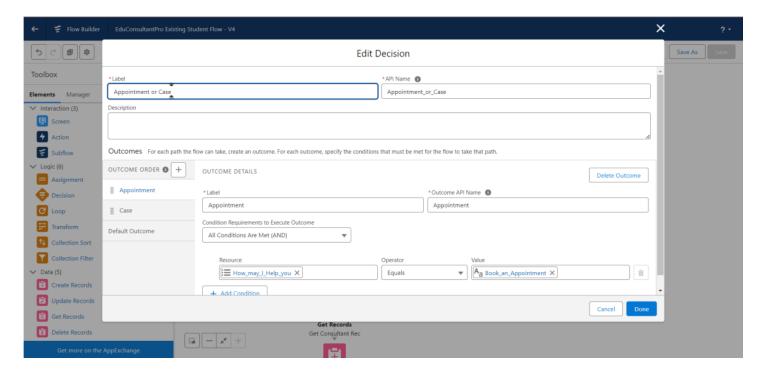




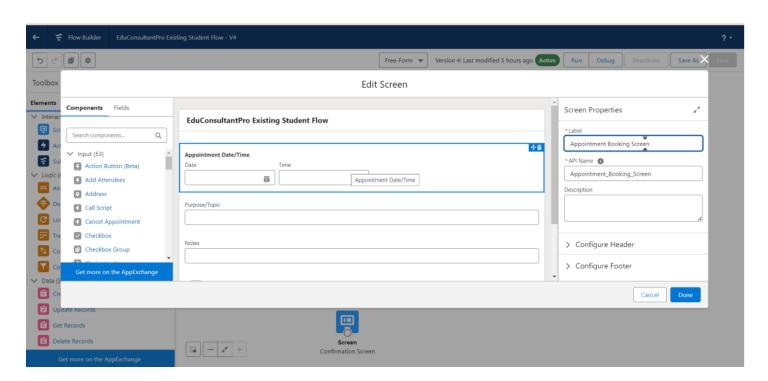
#### Add GET Record Element



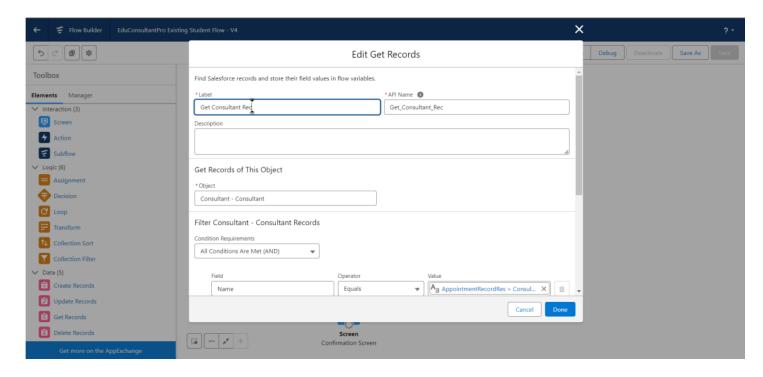
#### Add Decision Element



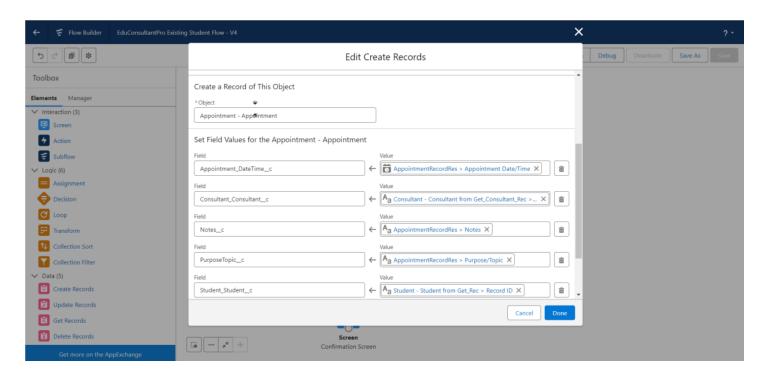
#### Add Screen Element

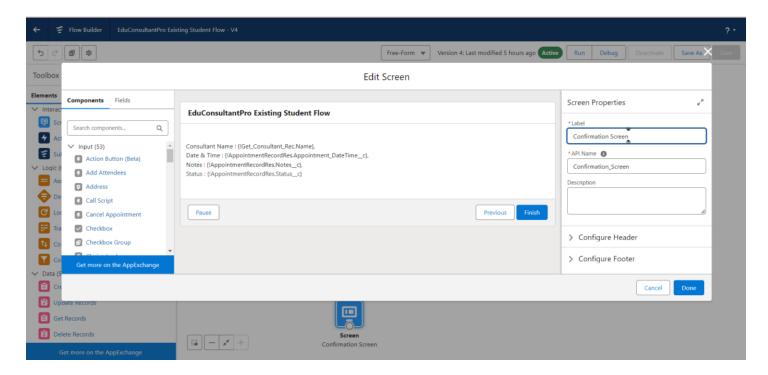


#### Add GET Record Element

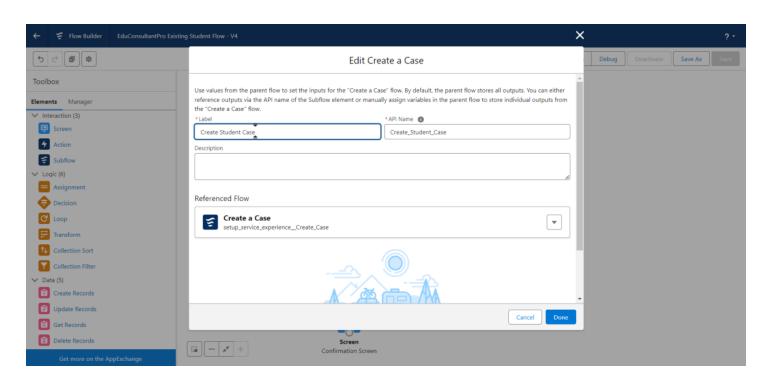


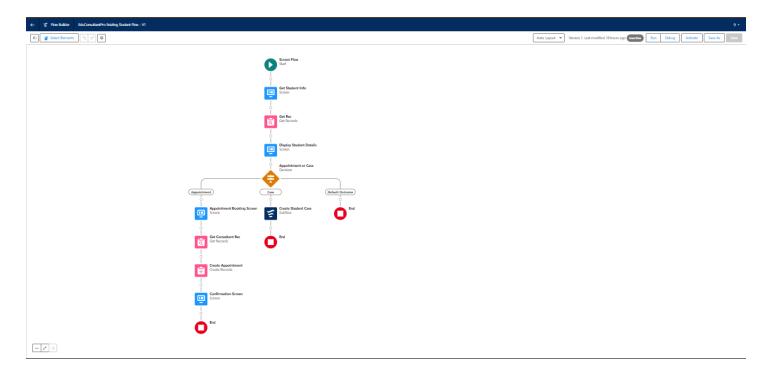
#### Create Appointment Record using Create Records Element





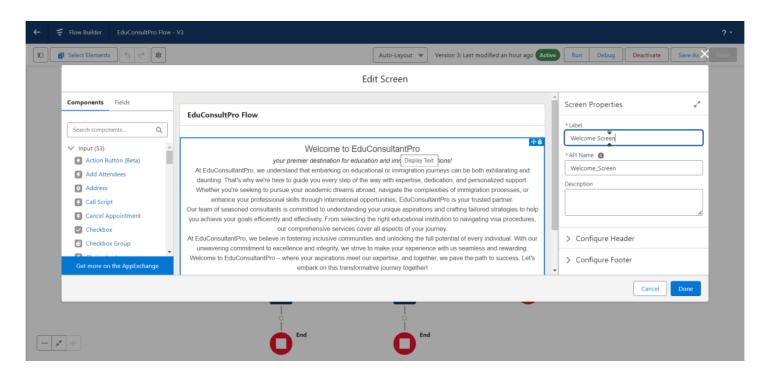
#### Add an SubFlow Element

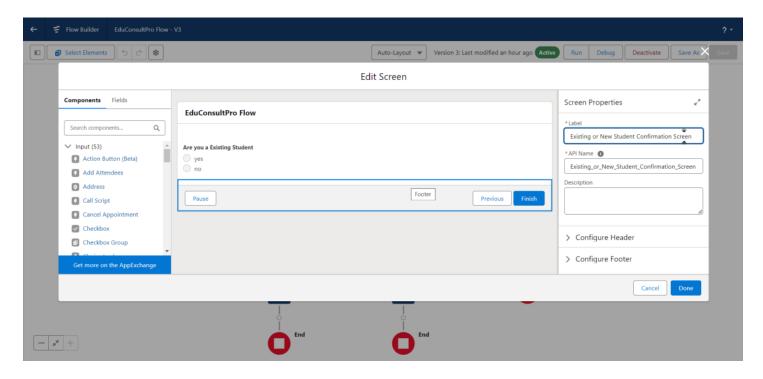




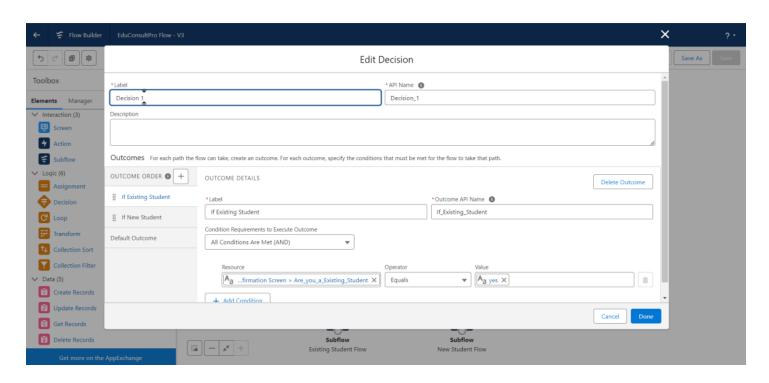
# **ACTIVITY 7:** Create a ScreenFlow to Combine all the flows at one place

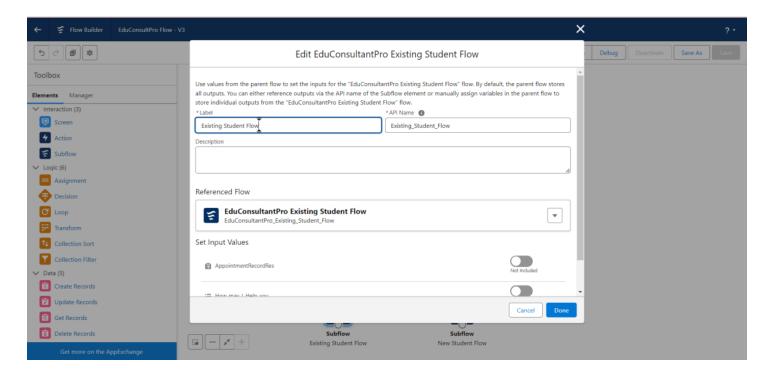
#### Add Screen Element



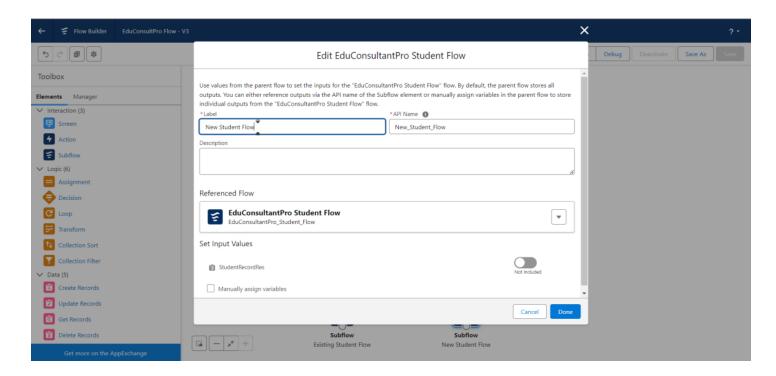


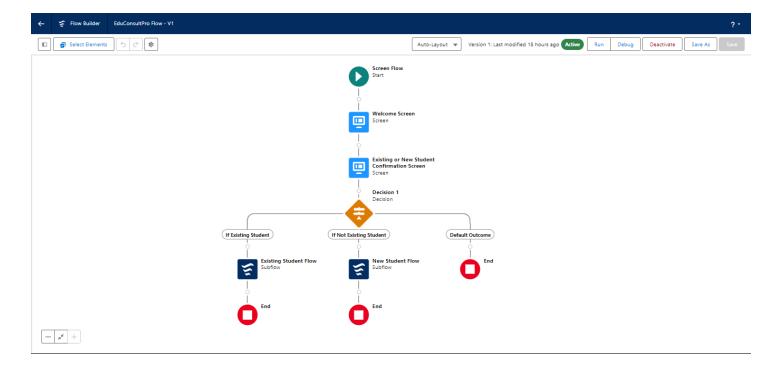
#### Add Decision Element



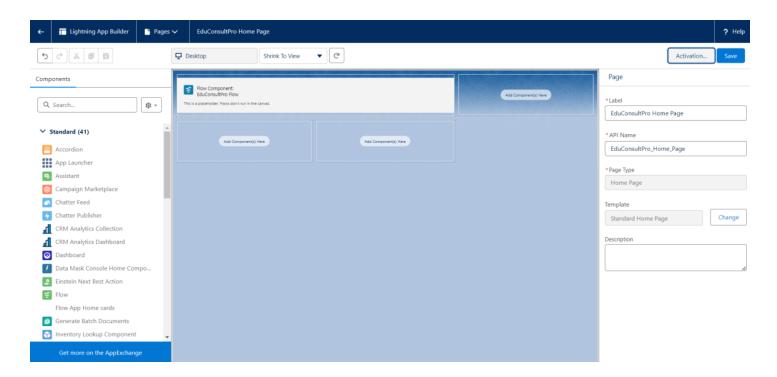


#### Add an SubFlow Element





# **ACTIVITY 8:** Create a lightning app page



**THANKYOU**