

Project Title A

CRM Application to Manage

the Services offered by an

Institution

Team leader NM ID:

6890214E29D5914BE2D4A24513E3D48A

Team Members NM ID:

0286B812A8183A5A1BD469A59F83F27F

E34D2F388B2C569B3944A6D73A75EC33

C3A18016794BACDB5A148AA81619E83E

3A1C1EEB8E5CCF3A9814D4A000F3E36B

CRM Application to Manage the Services offered by an Institution

1. Project Overview

The CRM application aims to leverage Salesforce's ecosystem to streamline the management of institutional services, enhance customer relationships, and optimize service delivery processes. This solution will help institutions centralize customer data, automate workflows, and deliver personalized experiences to customers. It also provides insights through robust analytics, allowing institutions to make data-driven decisions

2. Objectives:

- **Centralized Data Management:** Consolidate all customer and service data into a single, accessible platform.
- **Streamlined Service Operations:** Automate workflows like service requests, approvals, and notifications to reduce manual workload.
- **Improved Customer Experience:** Provide self-service portals for customers to book, track, and provide feedback on services.
- **Enhanced Decision-Making:** Use real-time analytics and reports to monitor service trends and customer satisfaction.
- **Scalability:** Create a solution that adapts to the institution's growing needs.

3. Salesforce Key Features and Concepts Utilized

1. Core Objects:

- **Accounts and Contacts:** To manage customer information.
- **Service Requests (Custom Object):** To track and manage individual service requests.

2. Salesforce Service Cloud:

- **Case management** to handle and resolve customer issues efficiently.
- **Integration with Knowledge Base** for customer self-help.

3. Salesforce Experience Cloud:

- **Customizable portals** for customers to access services, track requests, and provide feedback.

4. Salesforce Flow Builder and Process Builder:

- **Automate workflows** like case creation, approvals, and notifications.

5. Reports and Dashboards:

- **Real-time data visualization** for performance tracking and decision-making.

6. AppExchange Integrations:

- **Third-party apps** for payment gateways and communication tools like WhatsApp or email marketing.

7. Einstein Analytics (Optional):

- **AI-driven insights** to predict customer needs and improve service delivery.

4. Detailed Steps to Solution Design

It requires addressing multiple aspects such as functionality, user experience, technology stack, and security.

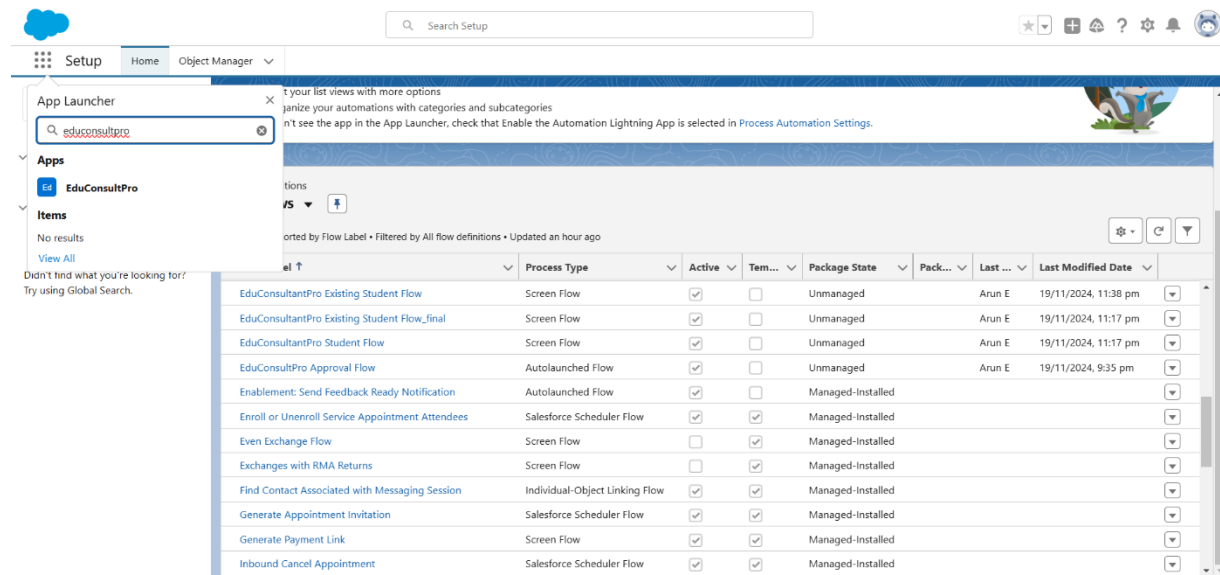
Salesforce CRM (Customer Relationship Management)

- **Customer 360:** Provides a holistic view of customers, including their travel

preferences, past bookings, and interactions, enabling personalized experiences and communication.

- **Accounts and Contacts:** Manage information about travel businesses (accounts) and their individual customers (contacts), including personal details, preferences, and history.
- **Opportunities:** Track sales opportunities such as bookings, upsells, or partnerships with travel vendors.

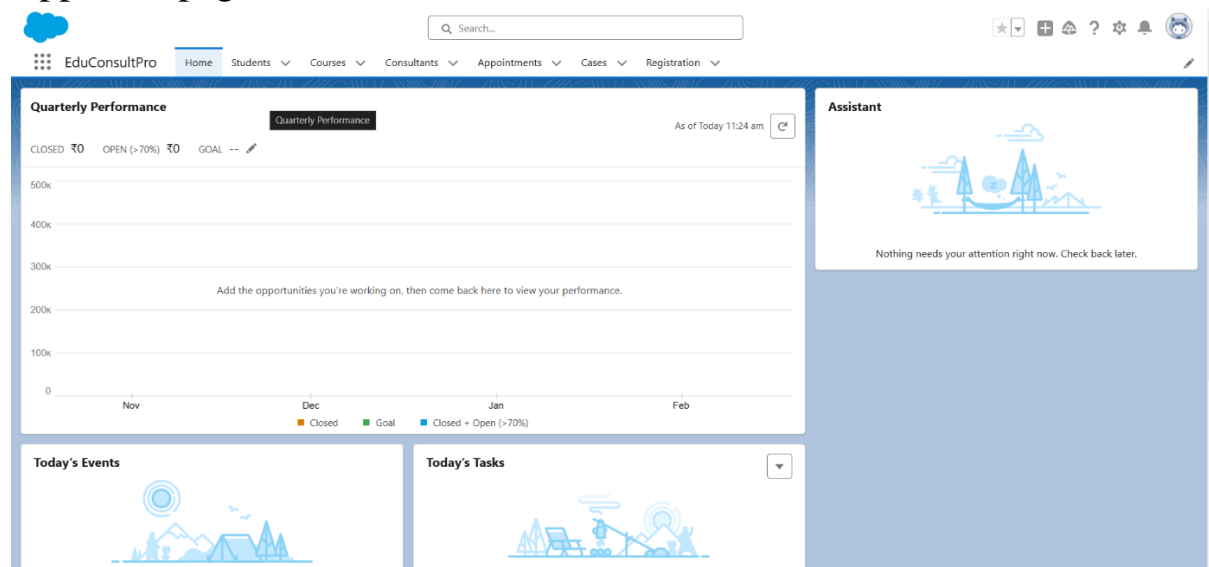
Search app:



The screenshot shows the Salesforce Setup page with the App Launcher search results for 'EduConsultPro'. The search results are displayed in a table with columns: Name, Process Type, Active, Tem..., Package State, Pack..., Last ..., and Last Modified Date.

Name	Process Type	Active	Tem...	Package State	Pack...	Last ...	Last Modified Date
EduConsultPro Existing Student Flow	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Arun E	19/11/2024, 11:38 pm
EduConsultPro Existing Student Flow_final	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Arun E	19/11/2024, 11:17 pm
EduConsultPro Student Flow	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Arun E	19/11/2024, 11:17 pm
EduConsultPro Approval Flow	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Arun E	19/11/2024, 9:35 pm
Enablement: Send Feedback Ready Notification	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Enroll or Unenroll Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Even Exchange Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Exchanges with RMA Returns	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Find Contact Associated with Messaging Session	Individual-Object Linking Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Generate Appointment Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Generate Payment Link	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Inbound Cancel Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

App homepage:



The screenshot shows the EduConsultPro app homepage. The main section is 'Quarterly Performance' with a line chart showing 'CLOSED' (red) and 'OPEN (>70%)' (blue) opportunities over time. The chart shows a peak in performance around December. Below the chart are sections for 'Today's Events' and 'Today's Tasks'. On the right, there is an 'Assistant' section with a message: 'Nothing needs your attention right now. Check back later.'

Step 1: Requirements Gathering

- **Understand the institution's services, workflows, and customer needs.**
- **Identify key pain points and areas for automation.**

Step 2: Data Modeling

- **Define objects:**
 - **Accounts:** Represent customers or institutions.
 - **Contacts:** Store details of individual customers.
 - **Service Requests:** Custom object to manage service interactions.
- **Establish relationships between objects.**

Step 3: Workflow Design

- **Use Flow Builder to automate:**
 - **Service request approvals.**
 - **Notifications for service progress.**
 - **Case escalations.**
- **Configure Service Level Agreements (SLAs) in Service Cloud.**

Step 4: Portal Development

- **Create a customer-facing portal using Experience Cloud.**
- **Features:**
 - **Login and registration.**
 - **Service booking and tracking.**
 - **FAQ and feedback submission.**

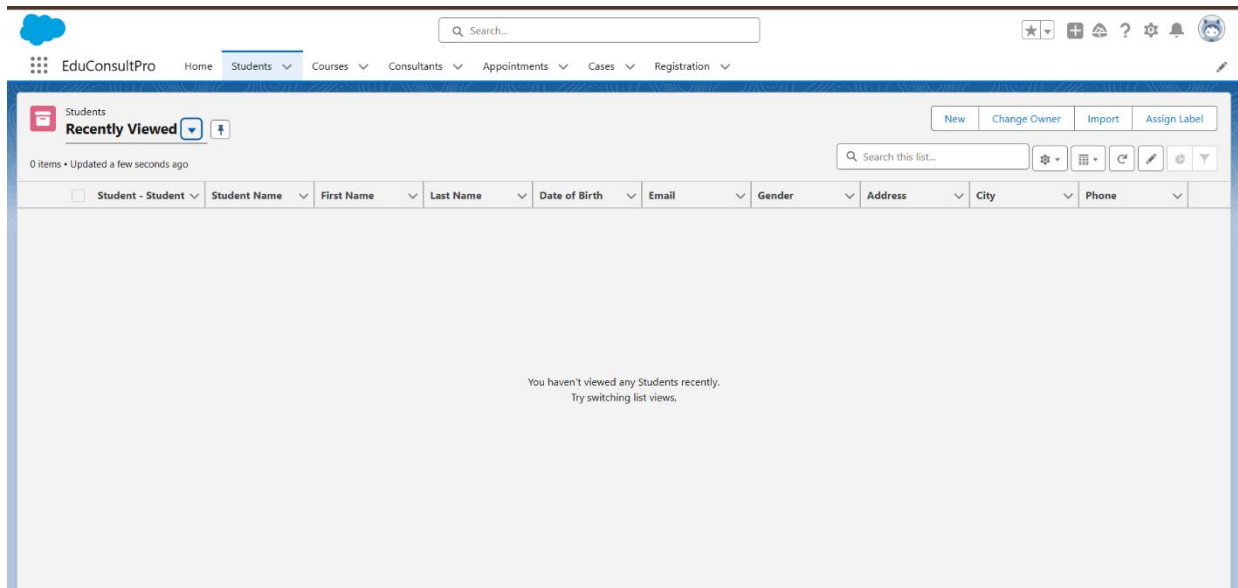
Step 5: Reporting and Analytics

- **Design dashboards for:**
 - **Service trends.**
 - **Staff performance metrics.**
 - **Customer satisfaction scores.**

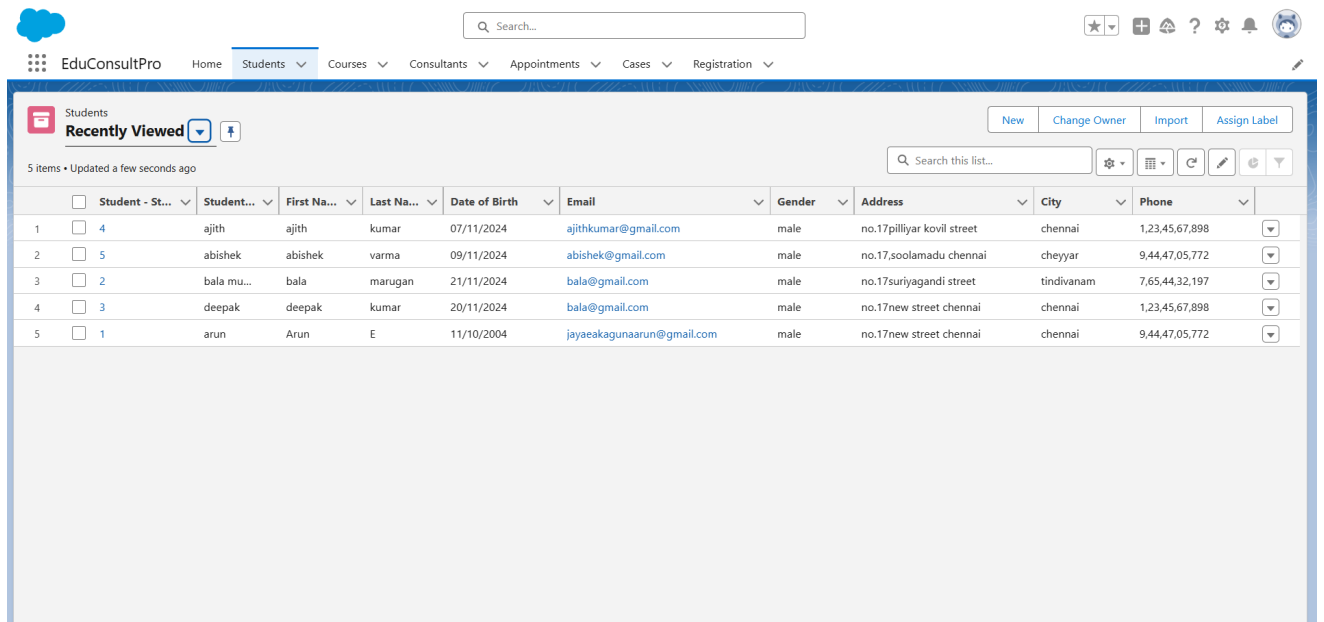
Step 6: Integrations

- **Connect payment gateways for service transactions.**
- **Integrate with external scheduling tools like Google Calendar.**

Design:



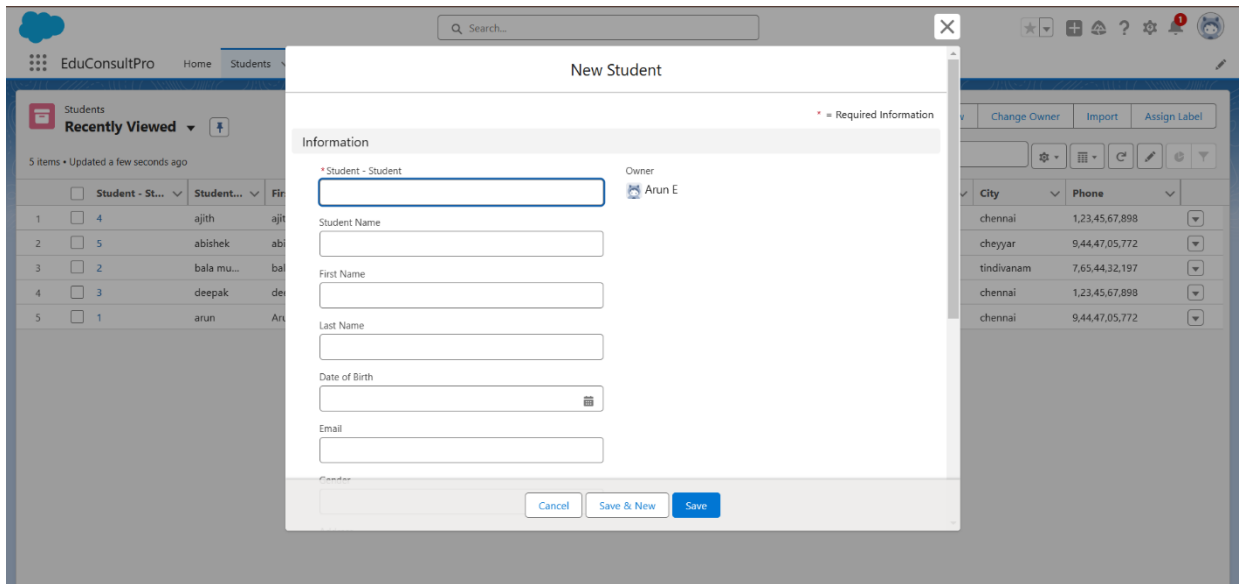
DashBoard:



The screenshot shows the 'Students' section of the EduConsultPro application. The 'Recently Viewed' tab is selected, and the table contains 5 items. The table columns are: Student - St..., Student..., First Na..., Last Na..., Date of Birth, Email, Gender, Address, City, and Phone. The data rows are as follows:

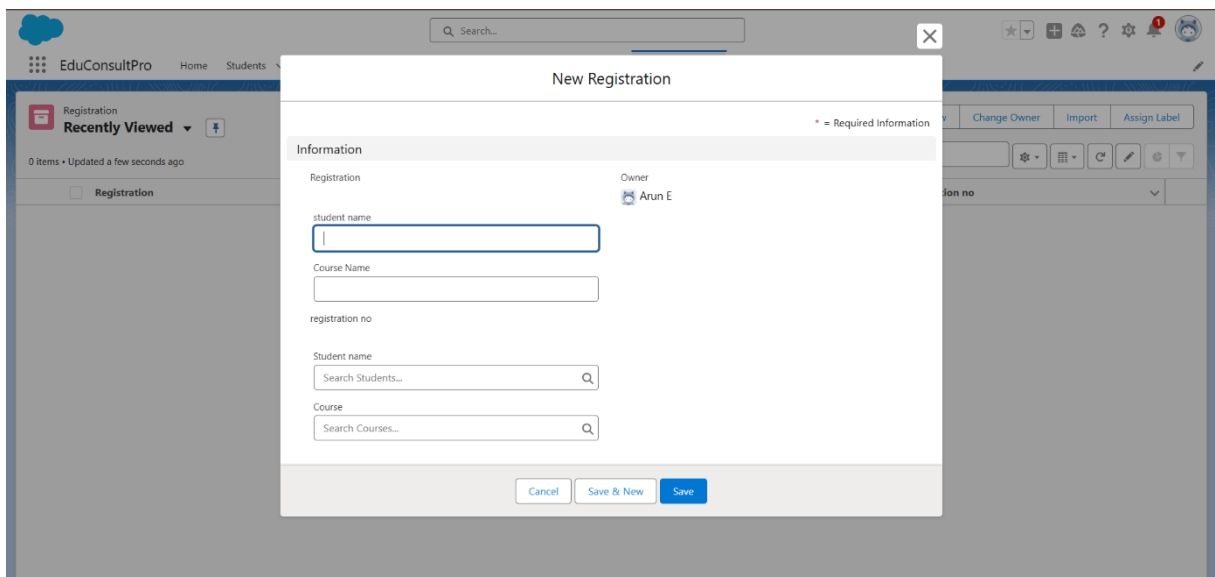
	Student - St...	Student...	First Na...	Last Na...	Date of Birth	Email	Gender	Address	City	Phone
1	4	ajith	ajith	kumar	07/11/2024	ajithkumar@gmail.com	male	no.17pilliyar kovil street	chennai	1,23,45,67,898
2	5	abishek	abishek	varma	09/11/2024	abishek@gmail.com	male	no.17,soolamadu chennai	cheyyar	9,44,47,05,772
3	2	bala mu...	bala	marugan	21/11/2024	bala@gmail.com	male	no.17suriyagandi street	tindivanam	7,65,44,32,197
4	3	deepak	deepak	kumar	20/11/2024	bala@gmail.com	male	no.17new street chennai	chennai	1,23,45,67,898
5	1	arun	Arun	E	11/10/2004	jayaekagunaarun@gmail.com	male	no.17new street chennai	chennai	9,44,47,05,772

Student object:



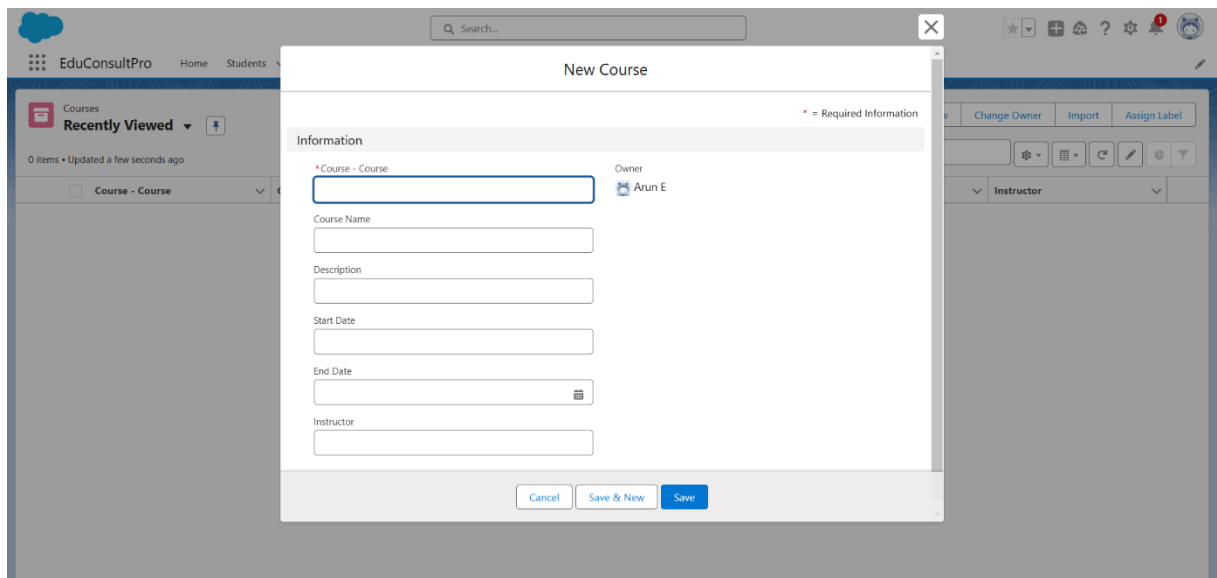
The screenshot shows the 'New Student' form in the EduConsultPro application. The form is titled 'New Student' and includes a search bar at the top. The form is divided into sections: 'Information' and 'Owner'. The 'Information' section contains fields for 'Student - Student' (a dropdown), 'Student Name', 'First Name', 'Last Name', 'Date of Birth', and 'Email'. The 'Owner' section shows 'Arun E' as the owner. The form also includes a 'Required Information' indicator and buttons for 'Cancel', 'Save & New', and 'Save'.

Registration object:



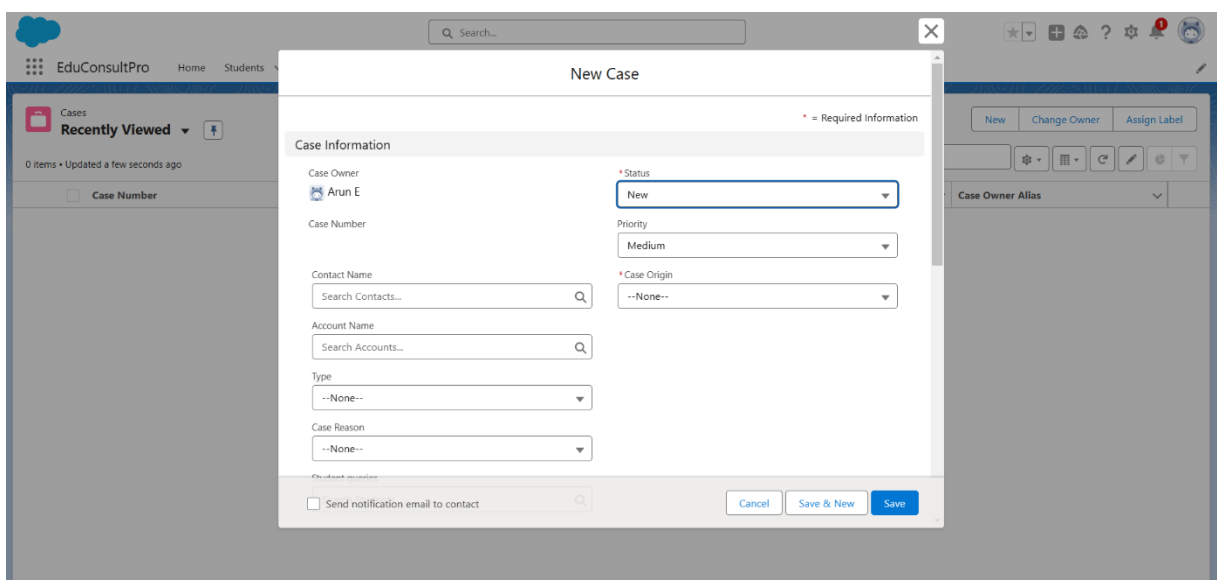
The screenshot shows the 'New Registration' form in the EduConsultPro application. The form is titled 'New Registration' and includes a search bar at the top. The form is divided into sections: 'Information' and 'Owner'. The 'Information' section contains fields for 'Registration', 'student name', 'Course Name', and 'registration no'. The 'Owner' section shows 'Arun E' as the owner. The form also includes a 'Required Information' indicator and buttons for 'Cancel', 'Save & New', and 'Save'.

Course object:



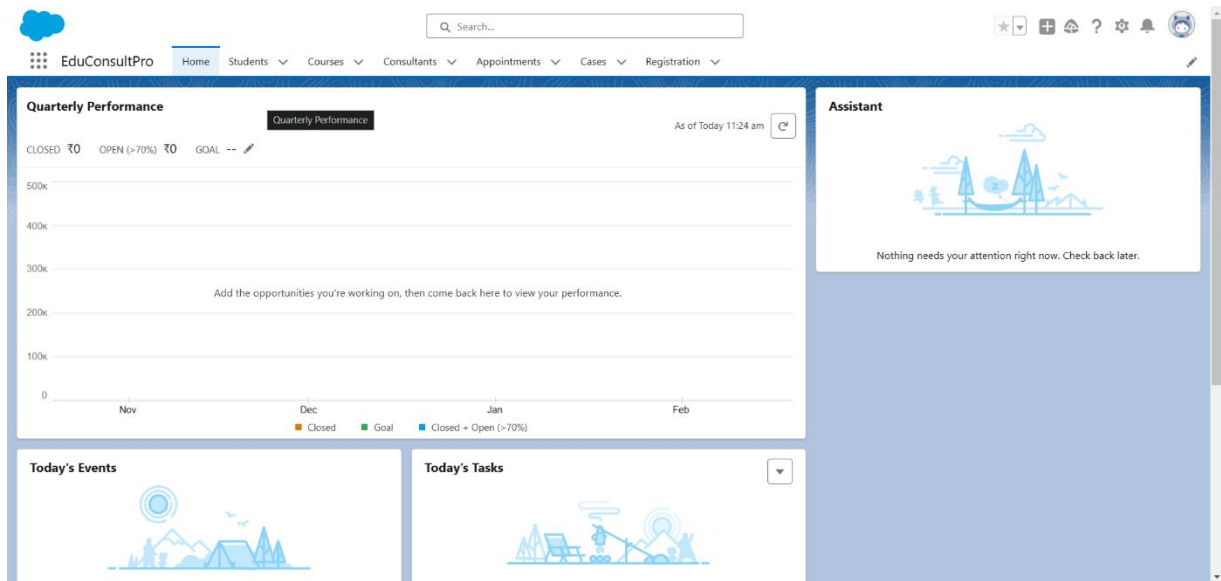
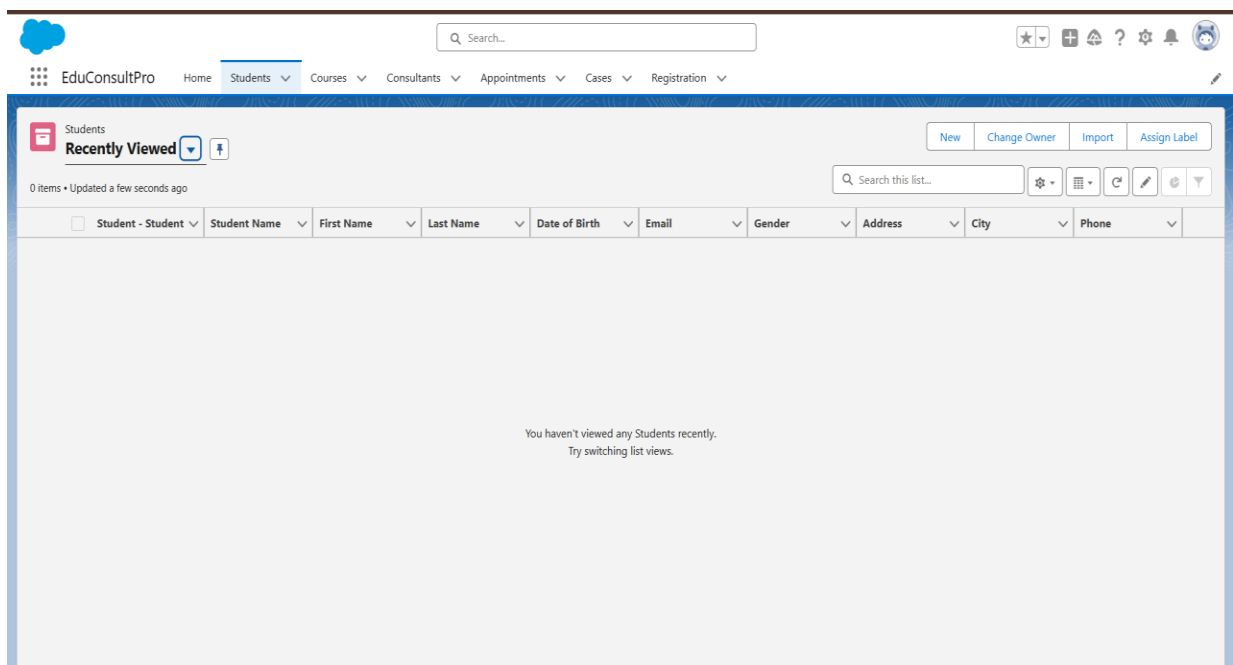
The screenshot shows the 'New Course' form in the EduConsultPro application. The form is titled 'New Course' and includes a search bar at the top. The form is divided into sections: 'Information' and 'Owner'. The 'Information' section contains fields for 'Course - Course' (required), 'Course Name', 'Description', 'Start Date', 'End Date', and 'Instructor'. The 'Owner' section shows 'Arun E' as the owner. The form also includes a 'Cancel' button, a 'Save & New' button, and a 'Save' button. The background shows the 'Courses' section of the application with a 'Recently Viewed' list.

Case object :



The screenshot shows the 'New Case' form in the EduConsultPro application. The form is titled 'New Case' and includes a search bar at the top. The form is divided into sections: 'Case Information' and 'Case Owner'. The 'Case Information' section contains fields for 'Case Owner' (Arun E), 'Case Number', 'Contact Name' (with a search bar), 'Account Name' (with a search bar), 'Type' (dropdown), 'Case Reason' (dropdown), and 'Status' (dropdown). The 'Case Owner' section shows 'Arun E' as the owner. The form also includes a 'Cancel' button, a 'Save & New' button, and a 'Save' button. The background shows the 'Cases' section of the application with a 'Recently Viewed' list.

Report:

The screenshot shows the 'Students' list in the EduConsultPro system. The list is titled 'Recently Viewed' and shows 0 items. The table has columns for Student Name, First Name, Last Name, Date of Birth, Email, Gender, Address, City, and Phone. The table is currently empty, with a message: 'You haven't viewed any Students recently. Try switching list views.'

Student - Student	Student Name	First Name	Last Name	Date of Birth	Email	Gender	Address	City	Phone
You haven't viewed any Students recently. Try switching list views.									

5. Testing and Validation

Testing Plan:

1. **Unit Testing:** Validate each component (e.g., custom objects, workflows, and portal features).
2. **Integration Testing:** Ensure seamless communication between Salesforce and integrated systems.
3. **User Acceptance Testing (UAT):** Involve institution staff and customers to verify usability and requirements compliance.

Validation Steps:

1. **Test automated workflows for accuracy.**
2. **Validate customer portal functionality.**
3. **Check report accuracy and alignment with business goals.**

6. Key Scenarios Addressed by Salesforce in the Implementation Project

- **Service Request Management:**
 - Automating the process from request submission to completion.
 - Ensuring customers receive timely updates.
- **Customer Communication:**
 - Centralizing all customer interactions for better tracking.


- Sending automated notifications and reminders.
- **Staff Productivity Monitoring:**
 - Dashboards to track workload and performance.
 - Automated task assignments.
- **Customer Self-Service:**
 - Empowering customers to book services and resolve queries without staff intervention.
- **Feedback Management:**
 - Collecting and analyzing customer feedback to improve services.







7. Conclusion


The Salesforce-based CRM application empowers institutions to manage their services efficiently, improving customer satisfaction while reducing operational overhead. By leveraging Salesforce's capabilities like Service Cloud, Experience Cloud, and automation tools, the institution can streamline workflows, provide a superior customer experience, and gain valuable insights for continuous improvement.

The system's flexibility and scalability ensure it meets the institution's current needs while adapting to future growth. Salesforce's robust ecosystem makes it a reliable foundation for long-term success in service management.


Output:










EduConsultPro

Home
Students
Courses
Consultants
Appointments
Cases
Registration






Students

Recently Viewed

New
Change Owner
Import
Assign Label

5 items • Updated a few seconds ago

	Student - St...	Student...	First Na...	Last Na...	Date of Birth	Email	Gender	Address	City	Phone	
1	<input type="checkbox"/> 4	ajith	ajith	kumar	07/11/2024	ajithkumar@gmail.com	male	no.17pilliyar kovil street	chennai	1,23,45,67,898	
2	<input type="checkbox"/> 5	abishek	abishek	varma	09/11/2024	abishek@gmail.com	male	no.17,soolamadu chennai	cheyyar	9,44,47,05,772	
3	<input type="checkbox"/> 2	bala mu...	bala	marugan	21/11/2024	bala@gmail.com	male	no.17suriyagandi street	tindivanam	7,65,44,32,197	
4	<input type="checkbox"/> 3	deepak	deepak	kumar	20/11/2024	bala@gmail.com	male	no.17new street chennai	chennai	1,23,45,67,898	
5	<input type="checkbox"/> 1	arun	Arun	E	11/10/2004	jayaeakagunaarun@gmail.com	male	no.17new street chennai	chennai	9,44,47,05,772	