A CRM Application to Manage the Services offered by an Institution

Introduction:

The EduConsultPro Home Page is thoughtfully designed to serve as the central platform for managing student information, consultant interactions, appointments, and overall educational or immigration workflows. This intuitive and user-friendly interface enables administrators, consultants, and users to perform key tasks efficiently, ensuring a seamless experience.

With a focus on efficiency, organization, and productivity, the EduConsultPro Home Page integrates powerful tools and streamlined processes to support educational consultancy services.

Key Features of the Home Page

1. Centralized Navigation
   The home page provides quick and easy access to essential components, including student management, appointments, courses, consultants, and case handling. Users can navigate effortlessly to view or update records without losing time.
2. Interactive Flow Integration
   The page includes the EduConsultPro Flow component, ensuring a guided and automated process for both new and existing students. From onboarding new students to managing appointments and case processes, the integrated flows simplify complex operations.
3. Efficient Student & Consultant Management
   - Student Records: Users can create, view, and update student records, ensuring all relevant data, such as student names, emails, and appointments, are organized.
   - Consultant Coordination: Seamlessly manage consultant information, including assignment, appointment bookings, and approval workflows.
4. Appointment Scheduling and Tracking
   EduConsultPro facilitates smooth booking, rescheduling, and tracking of appointments. Consultants and students can confirm details quickly, ensuring effective communication and time management.

TASK AND SCREENSHOTS:

Created the Custom Object using Spreadsheet & Relationship

Course Object :

Fields:

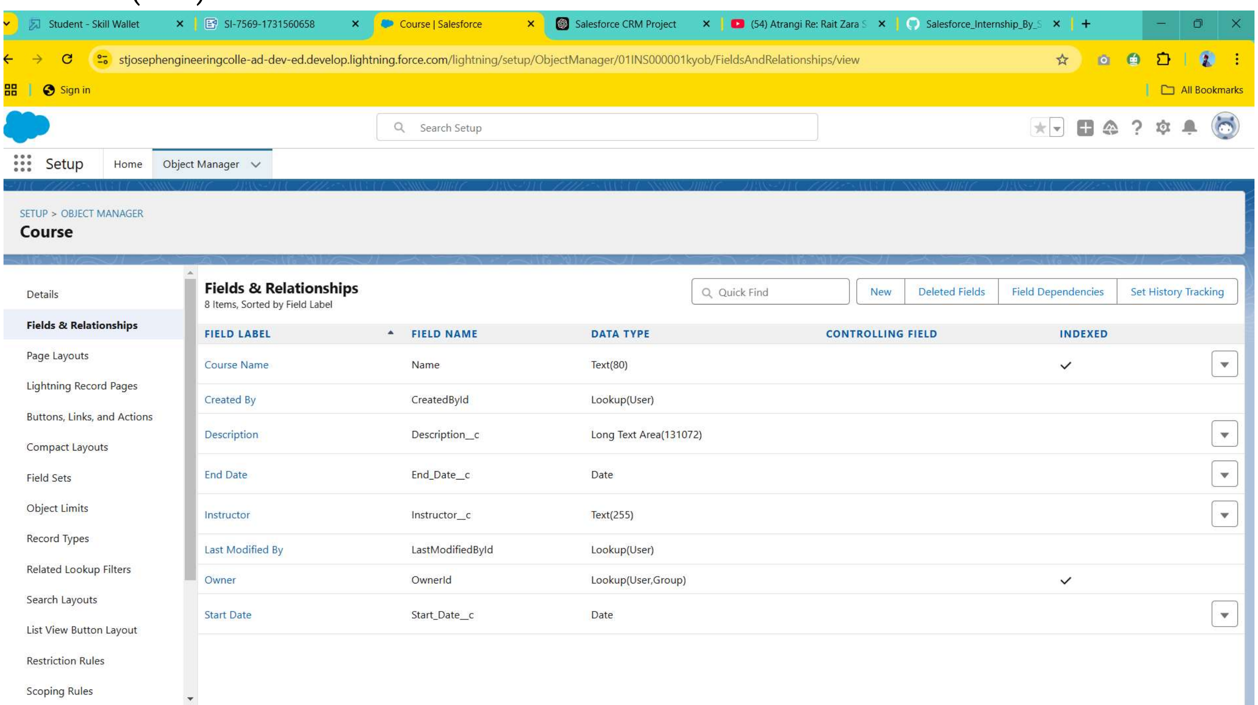
Course Name(Text)

Description(Text)

Start Date(Date)

End Date(Date)

Instructor(Text)



Consultant Object:

Fields:

Address(Long Text Area)

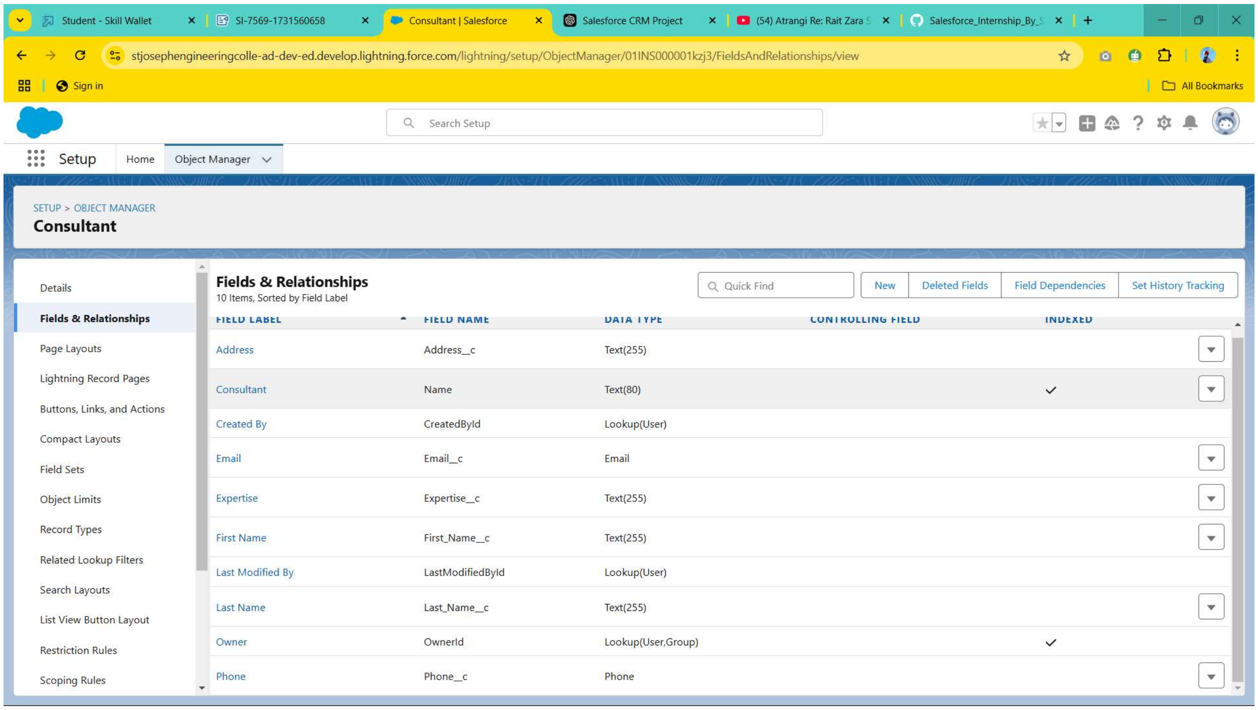
Email(Email)

Expertise(Text)

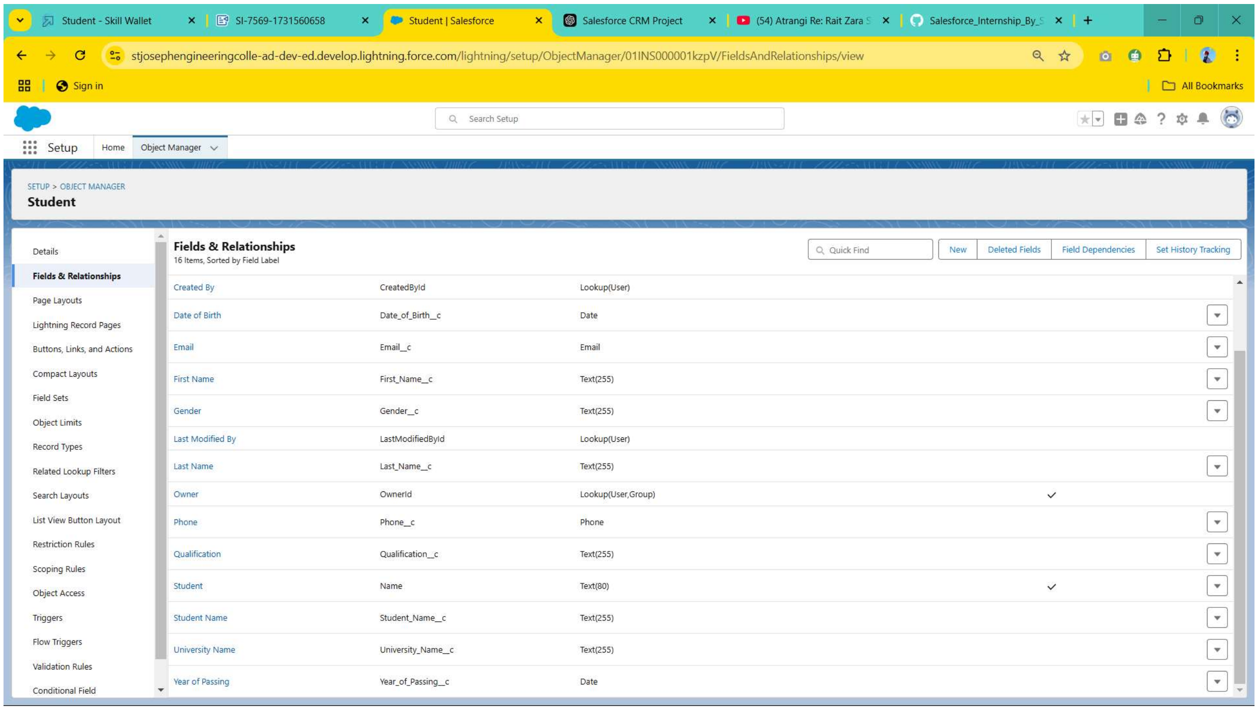
First Name(Text)

Last Name(Text)

Phone(Phone)



Student Object:
Fields:
Student Name(Text)
First Name(Text)
Last Name(Text)
Date of Birth(Date)
Email(Email)
Gender(Checkbox)
Address(Long Text Area)
City(Text)
Phone(Phone)
Qualification(Text)
University Name(Text)
Year of Passing(Number)


Student - Skill Wallet
SI-7569-1731560658
Student | Salesforce
Salesforce CRM Project
(54) Atrangi Re: Rait Zara
Salesforce_Internship_By_S
stjosephengineeringcolle-ad-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000001kzpV/FieldsAndRelationships/view
Sign in
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field
Fields & Relationships
16 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
Created By CreatedById Lookup(User)
Date of Birth Date_of_Birth__c Date
Email Email__c Email
First Name First_Name__c Text(255)
Gender Gender__c Text(255)
Last Modified By LastModifiedById Lookup(User)
Last Name Last_Name__c Text(255)
Owner OwnerId Lookup(User,Group)
Phone Phone__c Phone
Qualification Qualification__c Text(255)
Student Name Text(80)
Student Name Student_Name__c Text(255)
University Name University_Name__c Text(255)
Year of Passing Year_of_Passing__c Date

Appointment Object:

Fields:

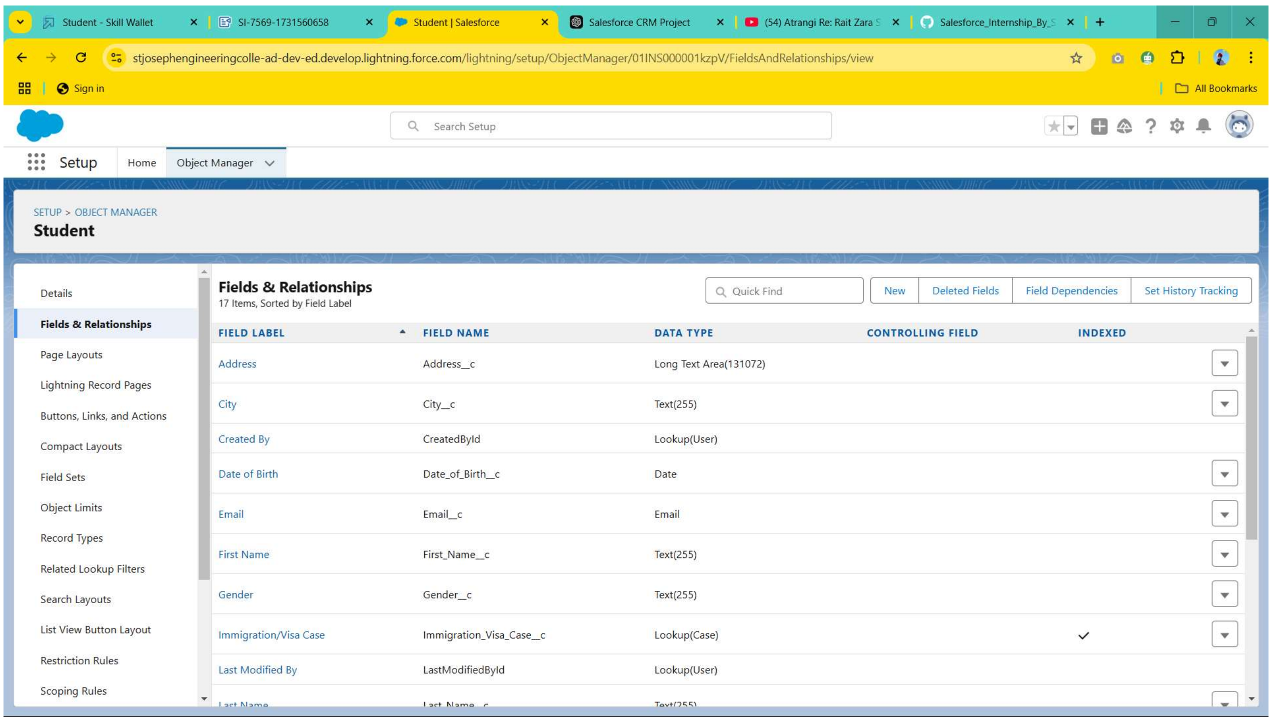
Appointment Date/Time(Date/Time)

Appointment No(Number)

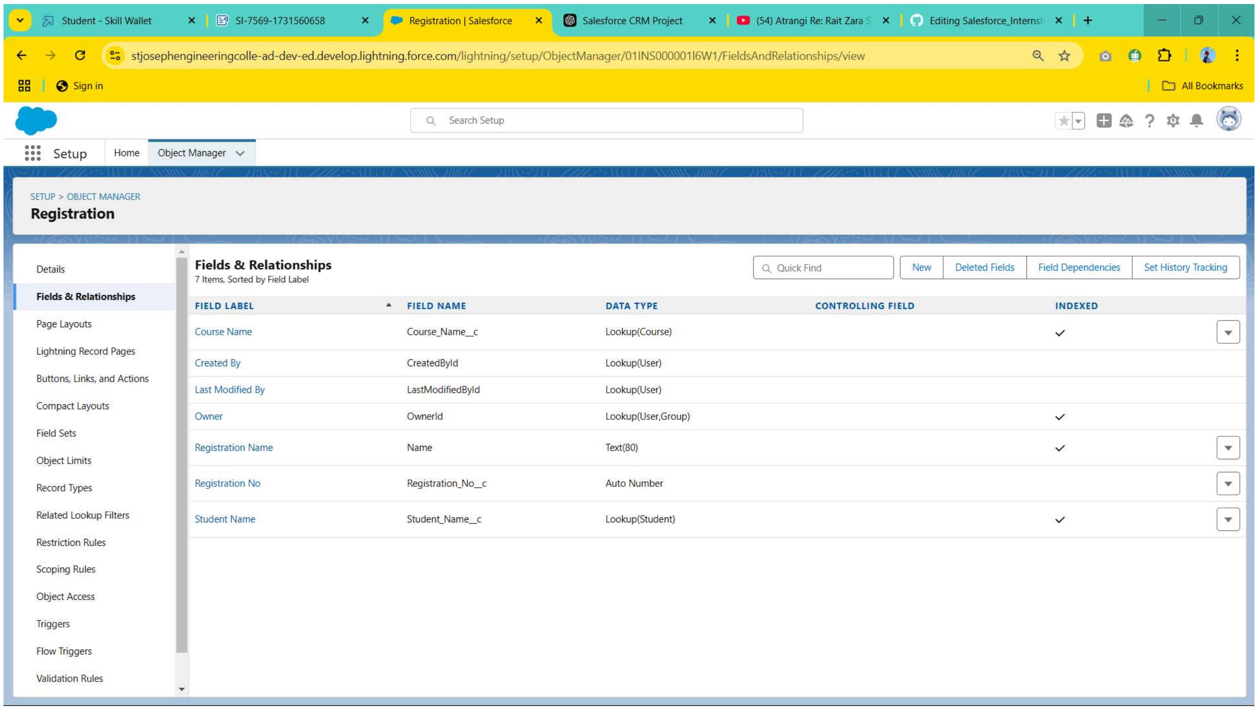
Notes(Long TextArea)

Purpose(Text)

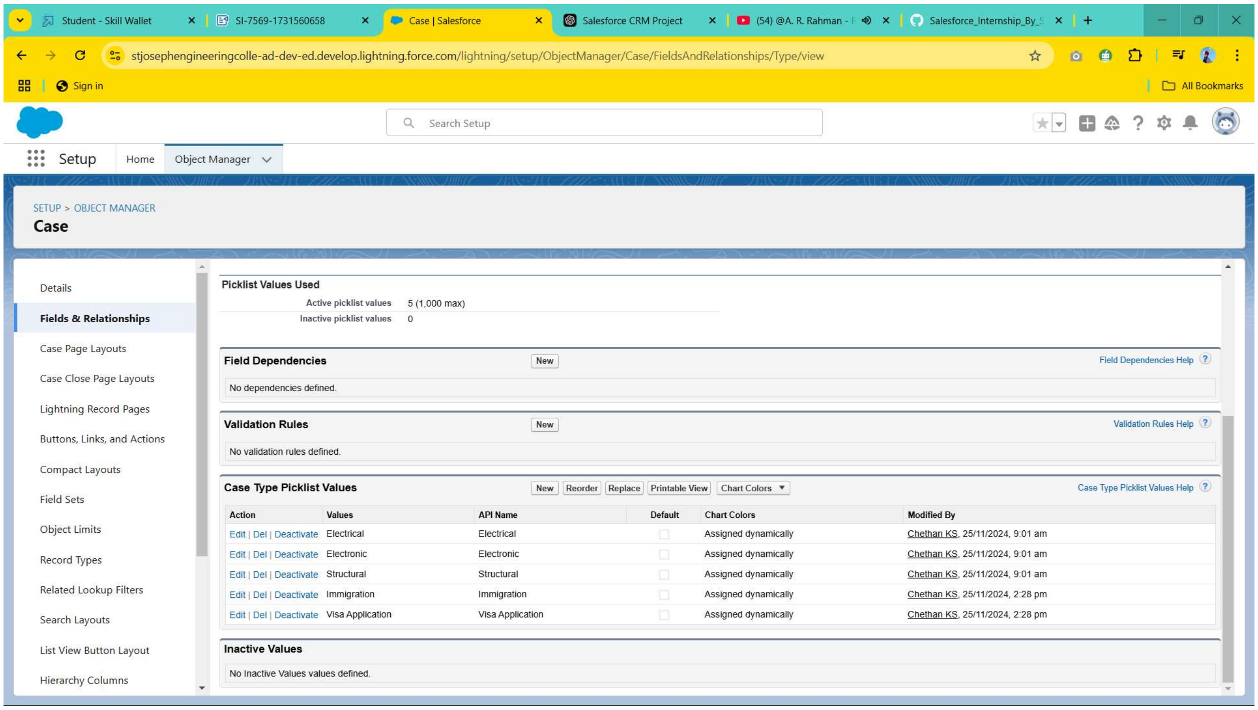
Status(Picklist)

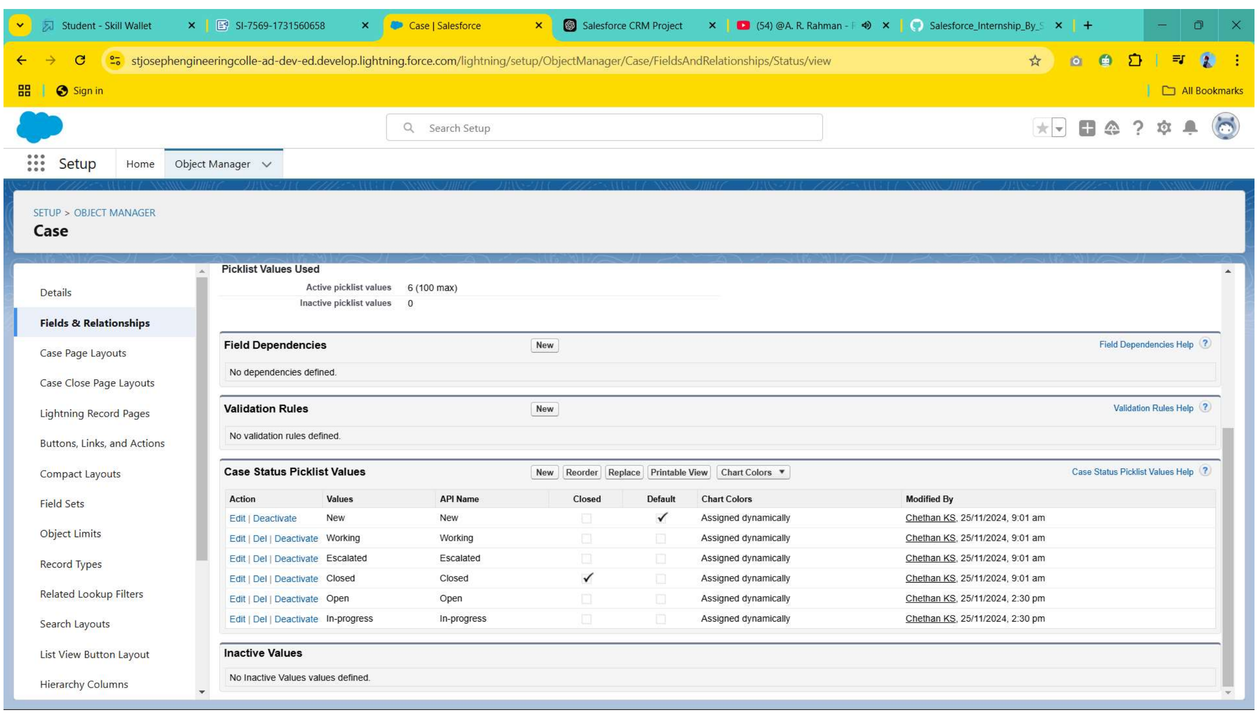


Registration Object:

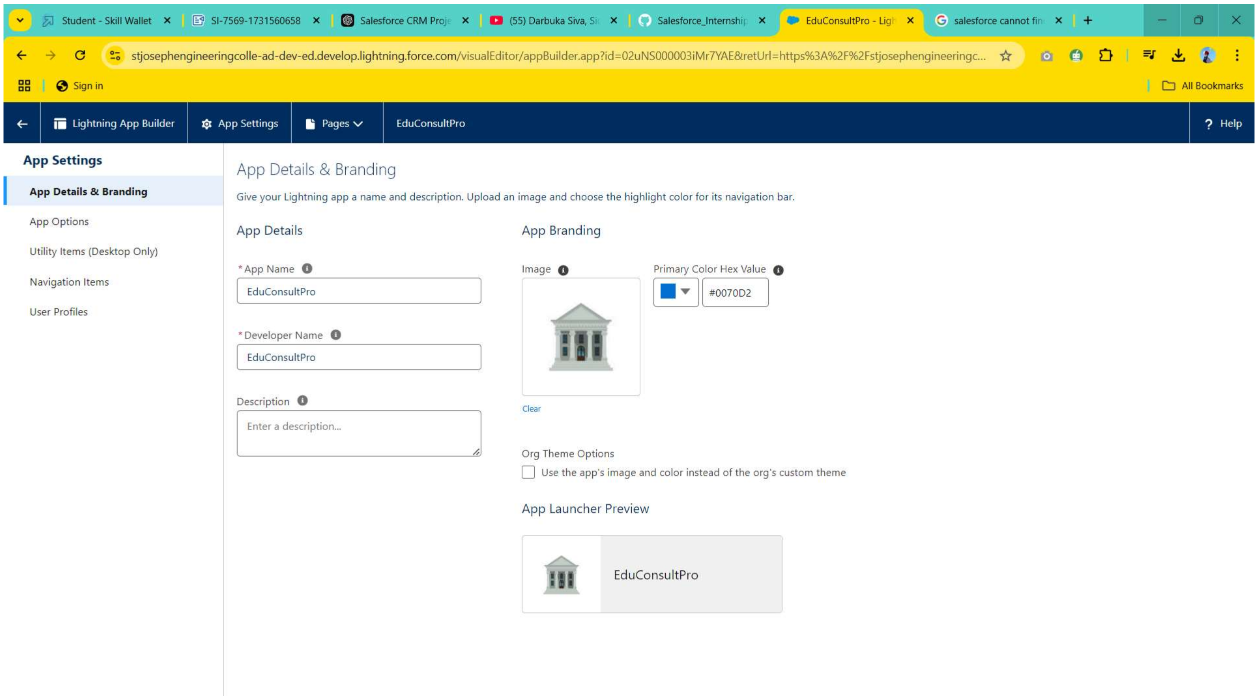


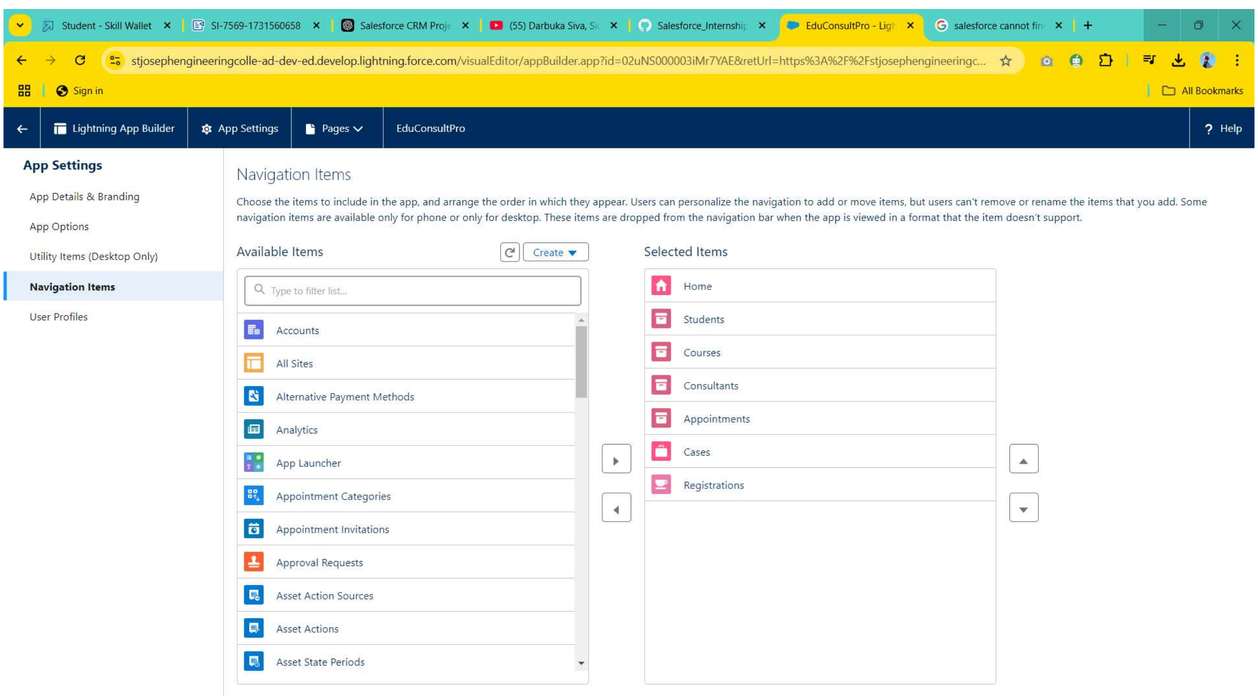
Case Type And Case Status Configuration





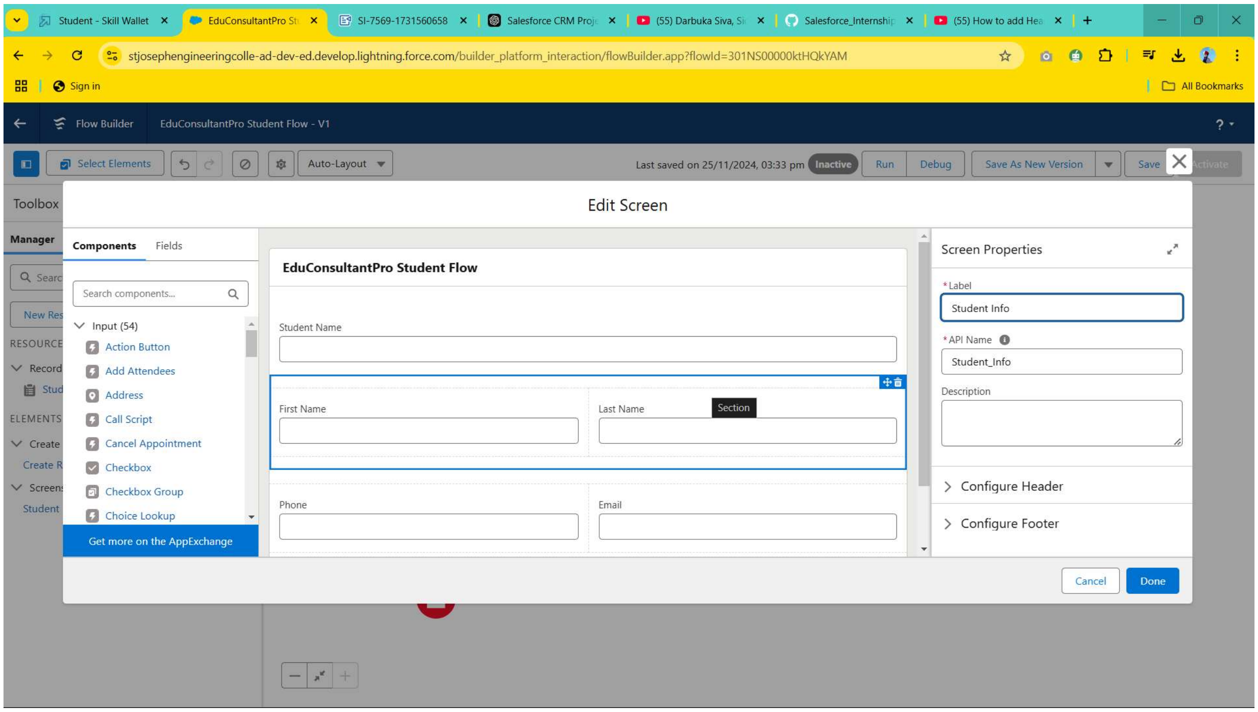
Create a Lightning App



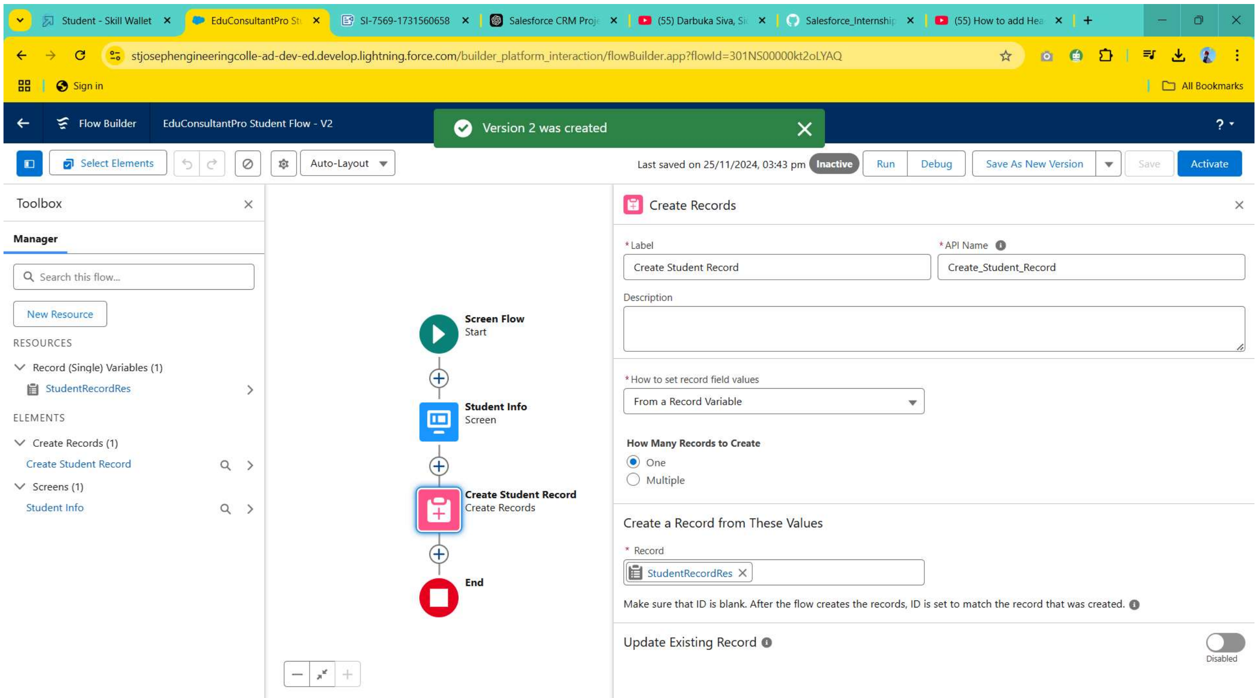


Create a ScreenFlow for Student Admission Application process.

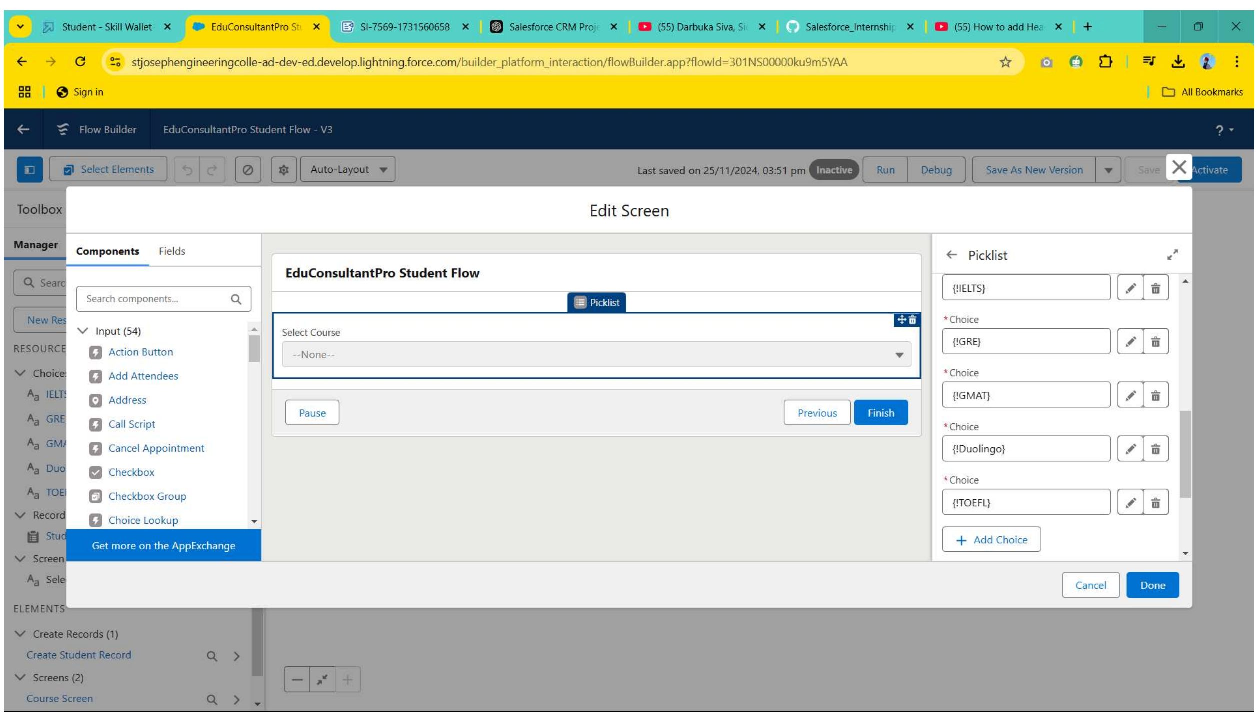
Add Screen Element



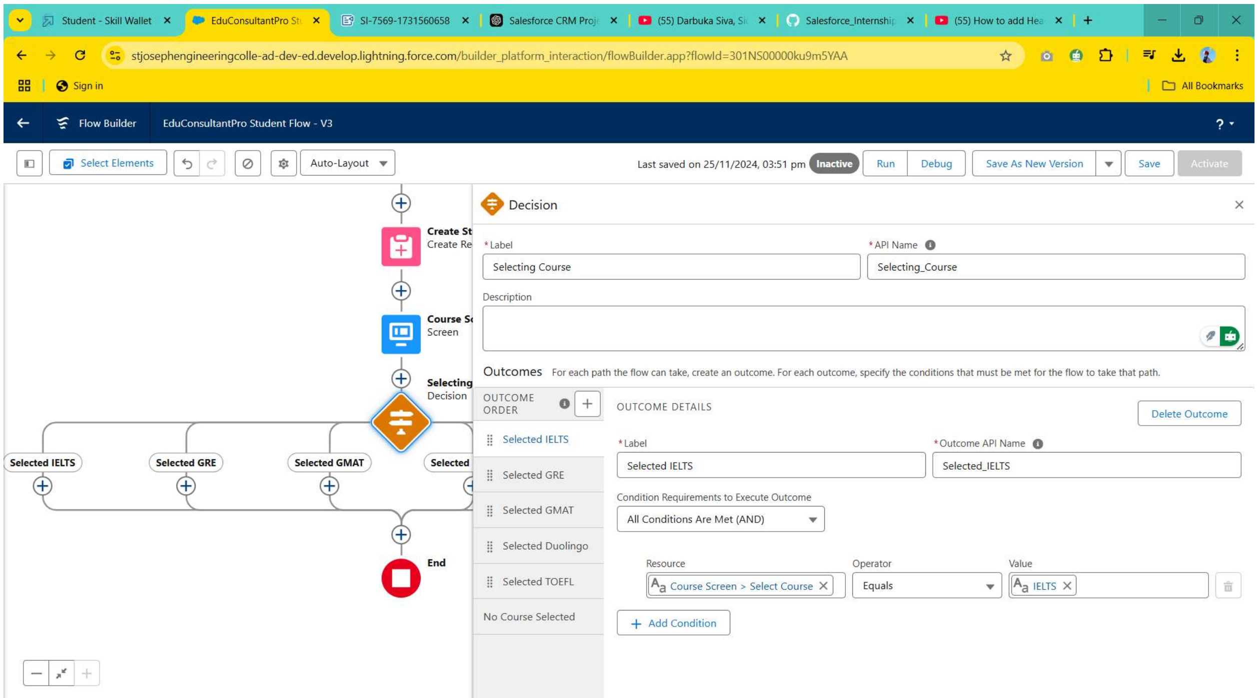
Create Student Record using Create Element



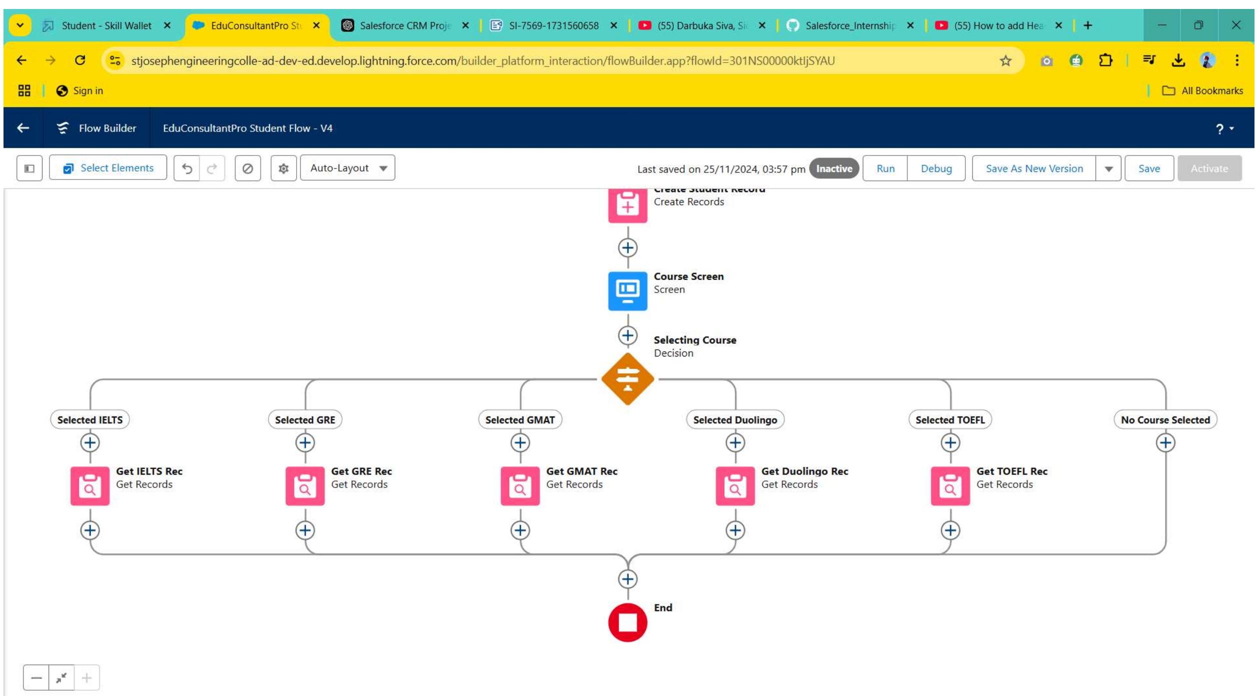
Add Screen Element:



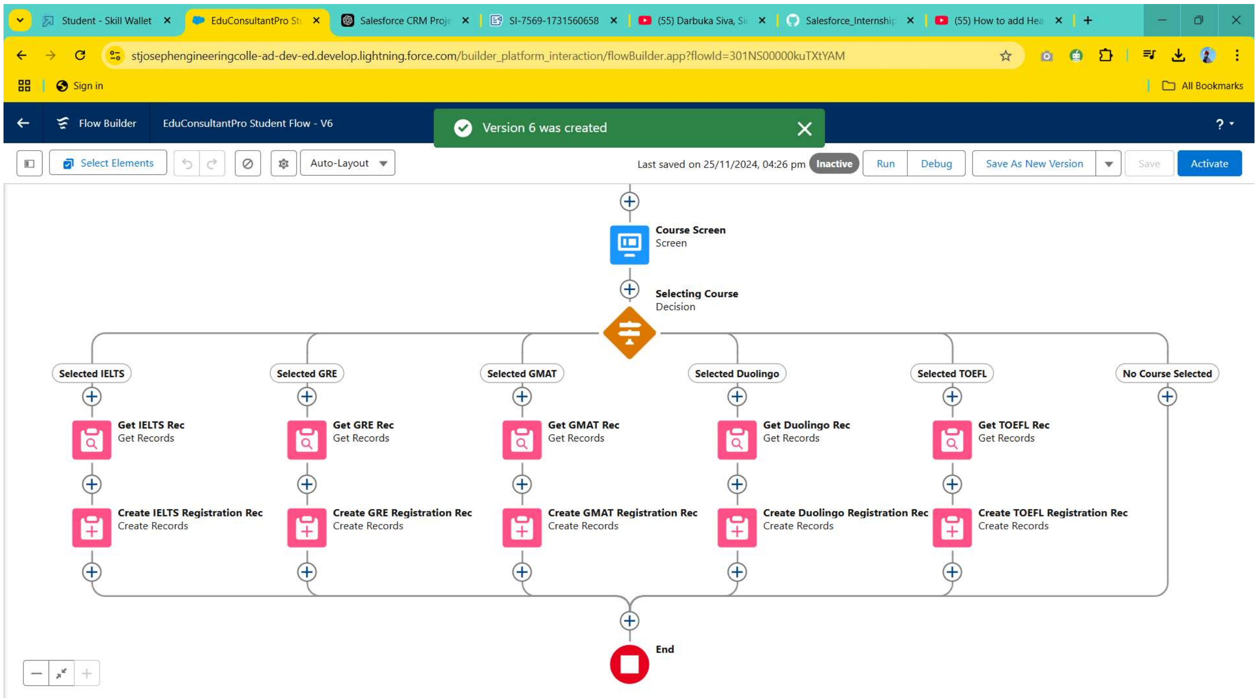
Add Decision Element



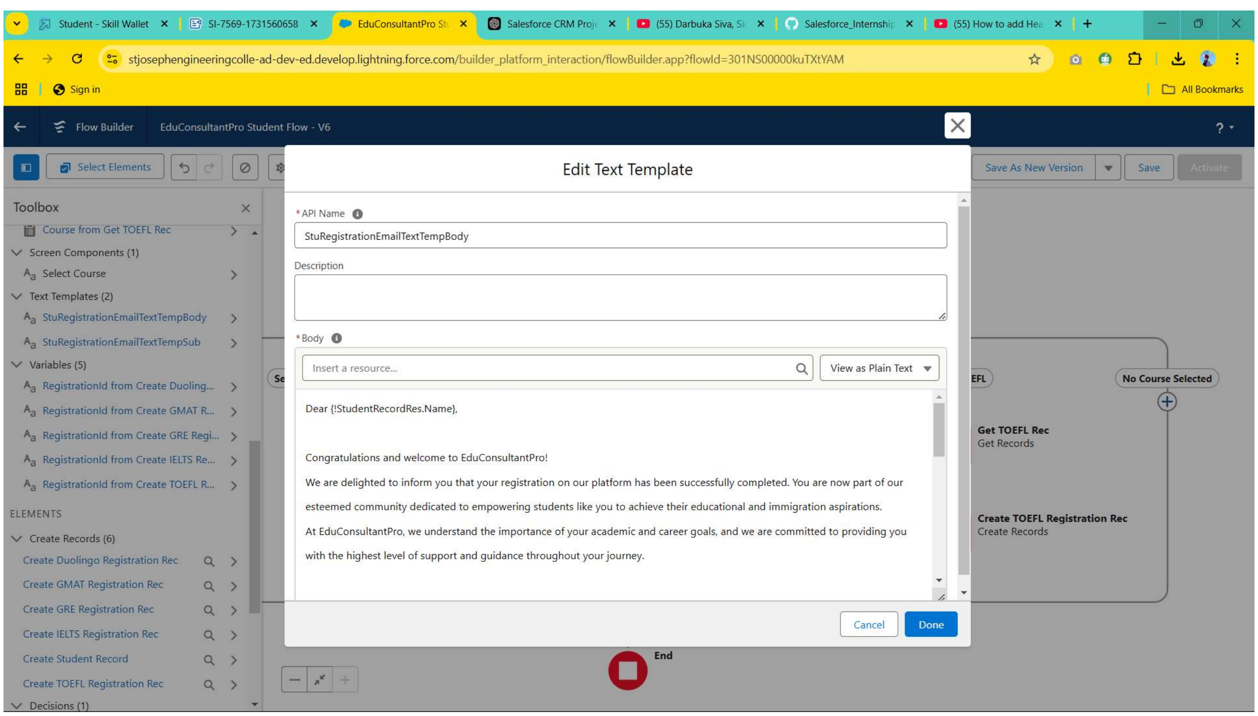
Add Get Record Element

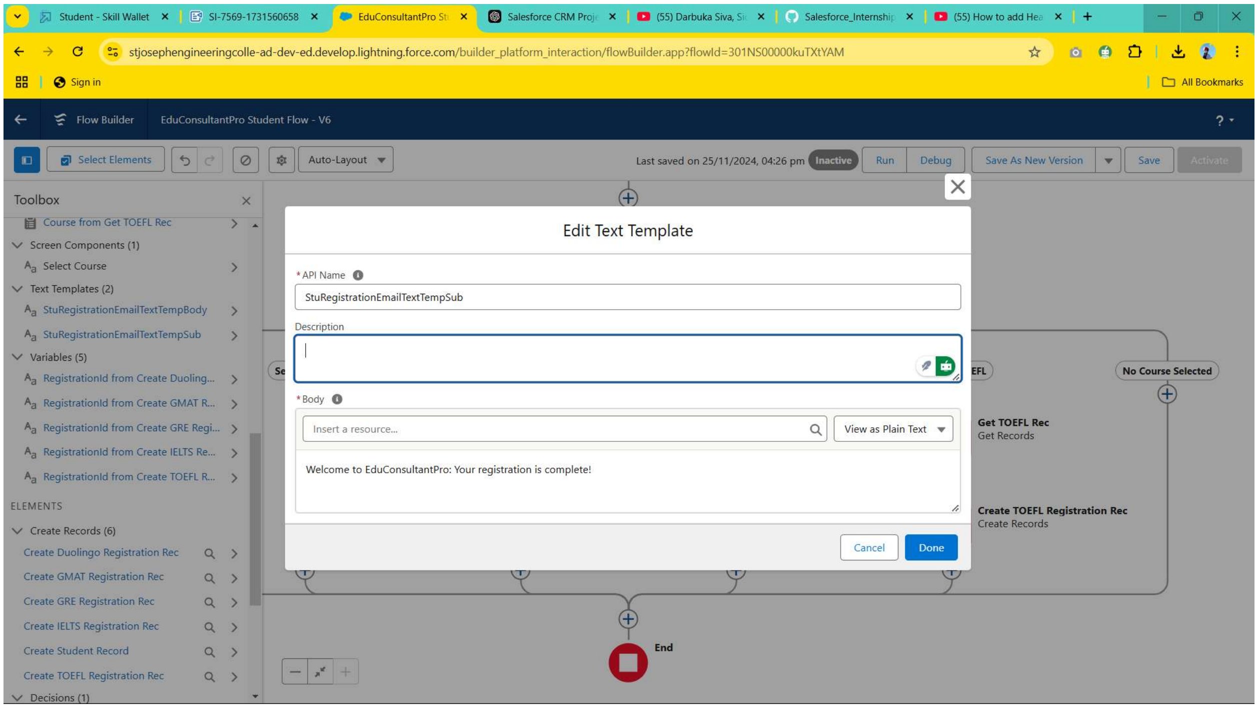


Create Regitration record using record element

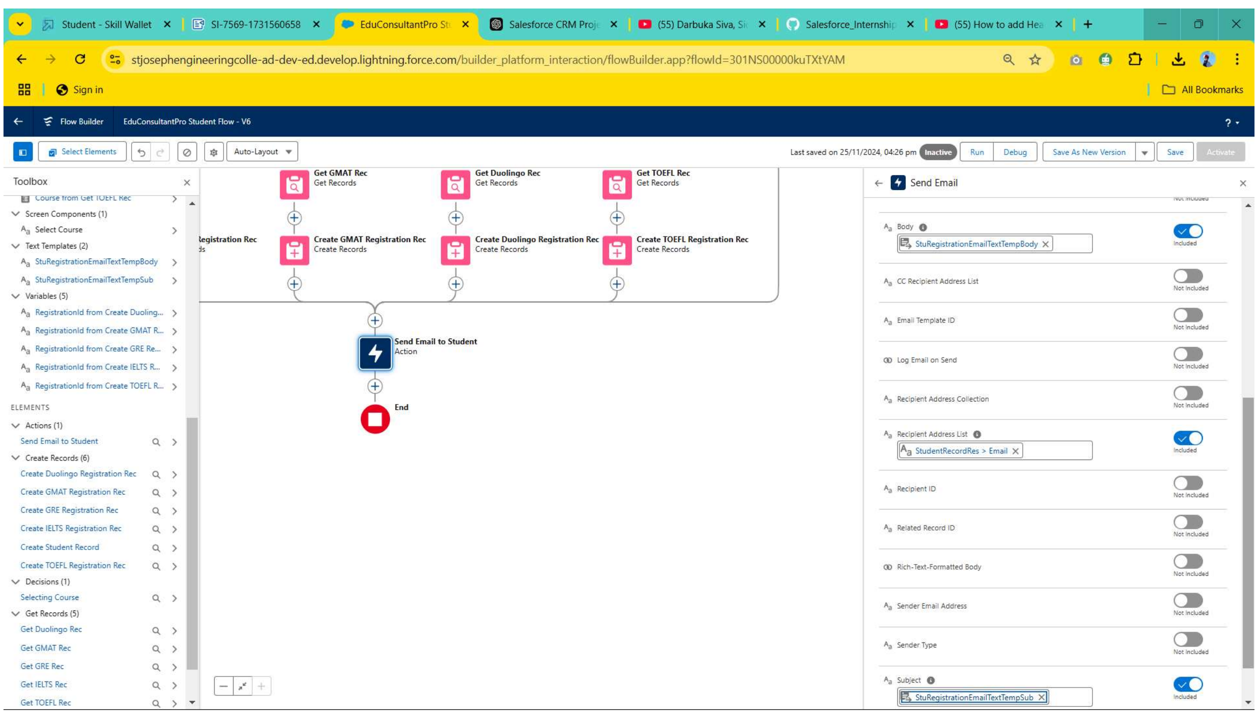


Create Email Text Template Variables for email body and subject

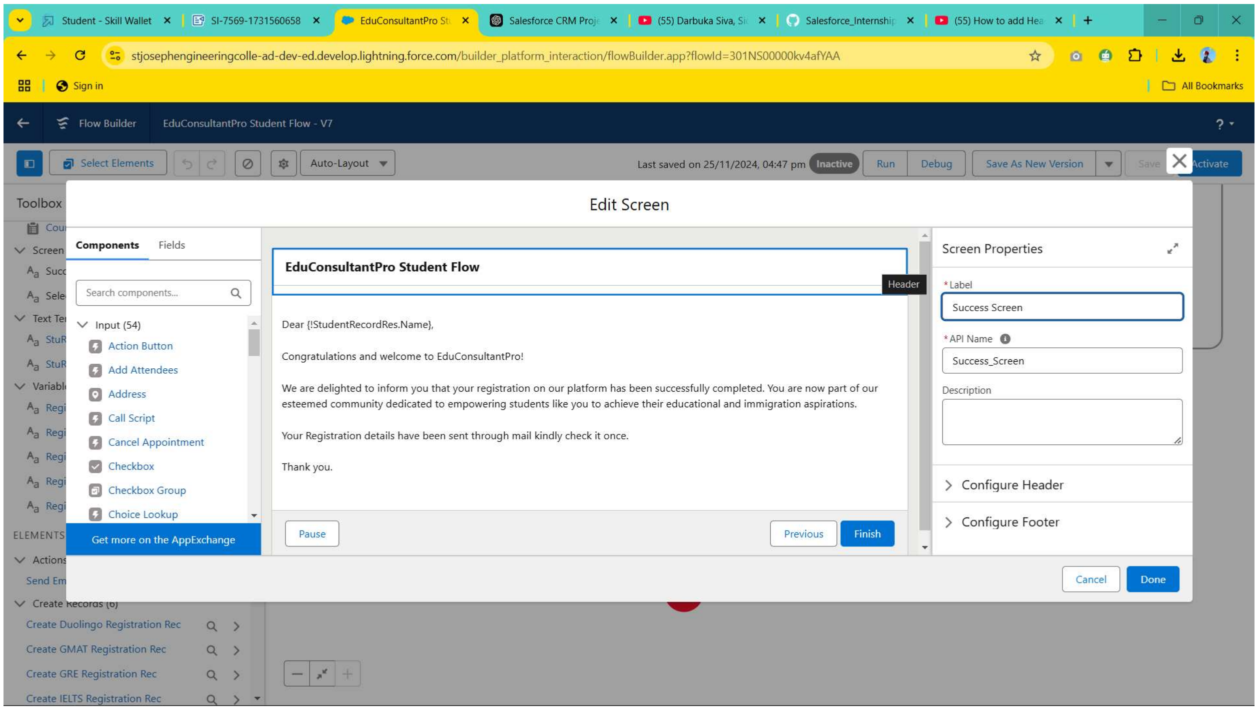




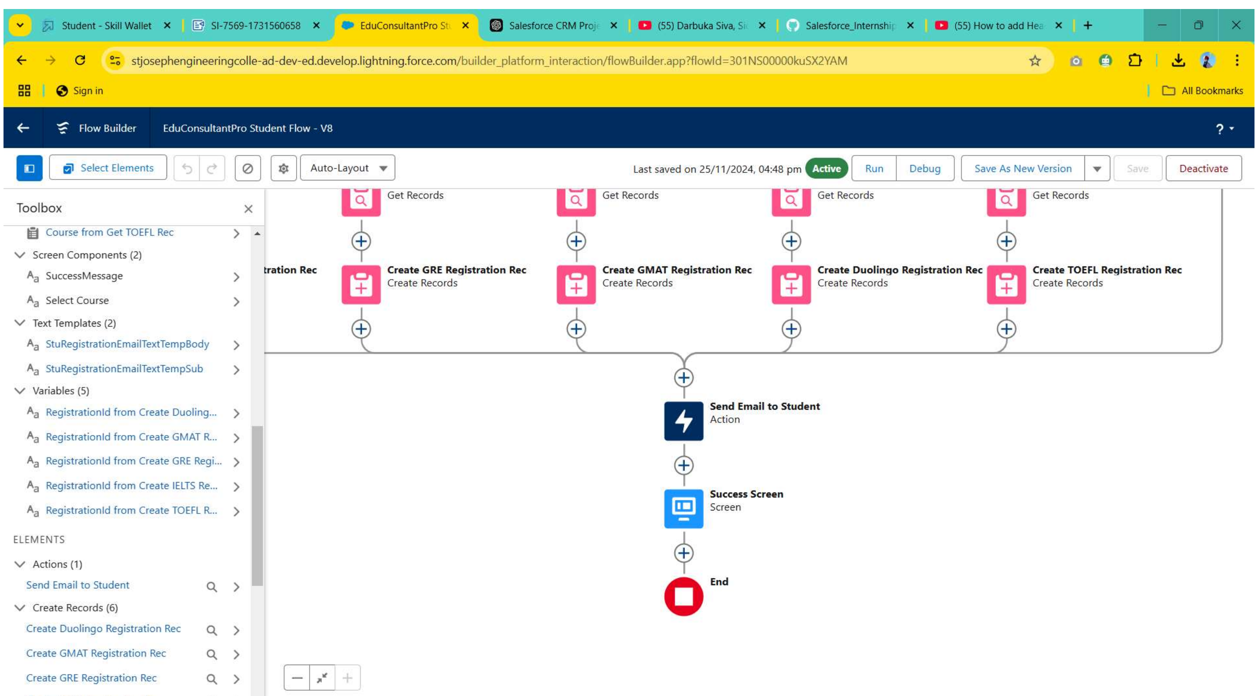
Add an Action Element



Add Sucess screen element

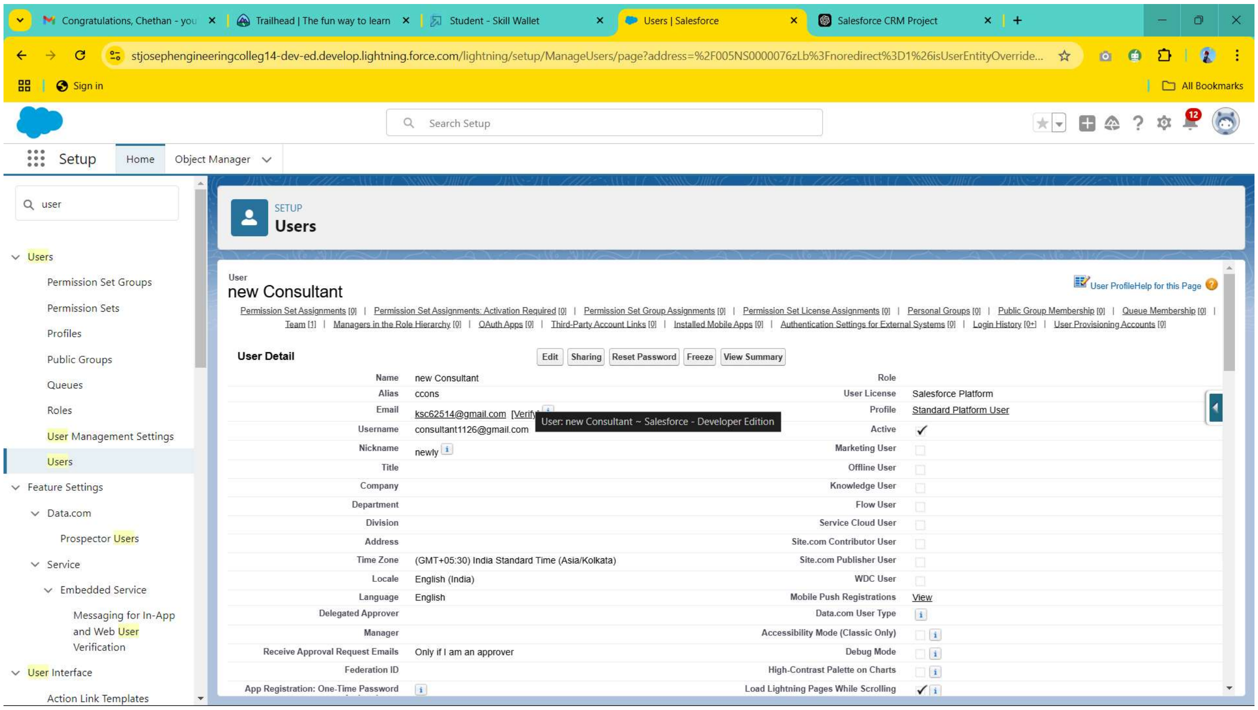


Activated the flow

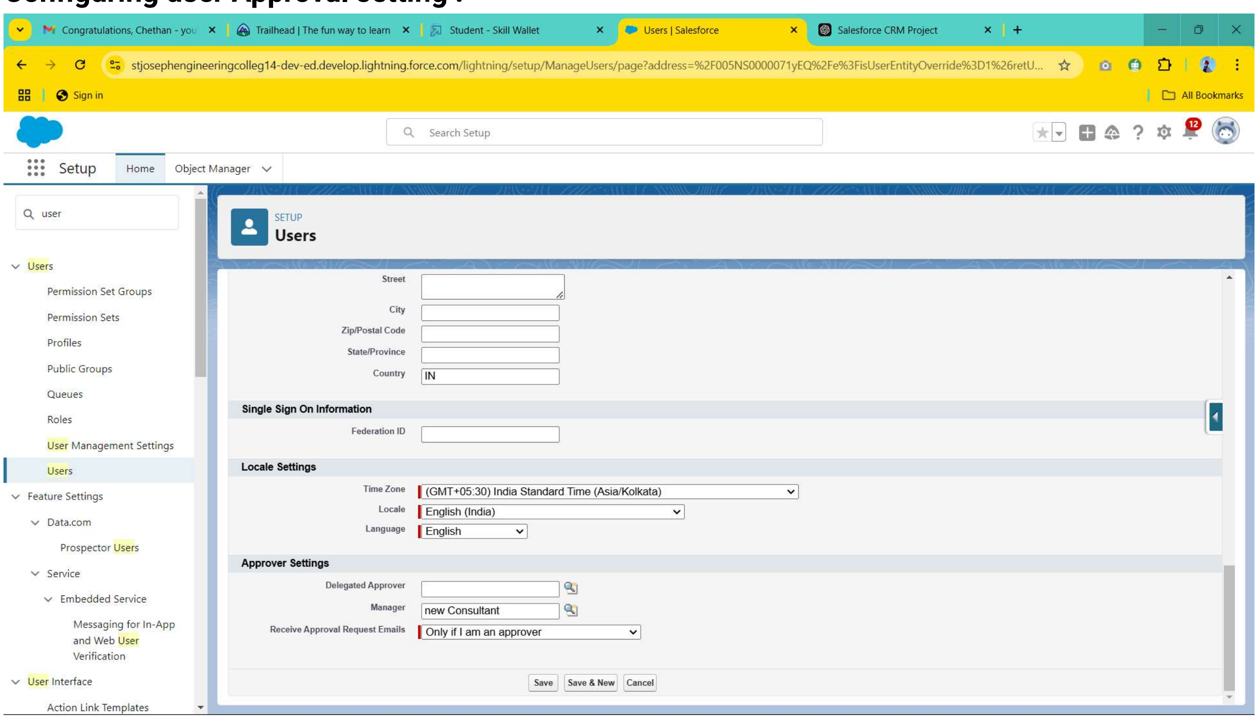


Create Users

User named Consultant:

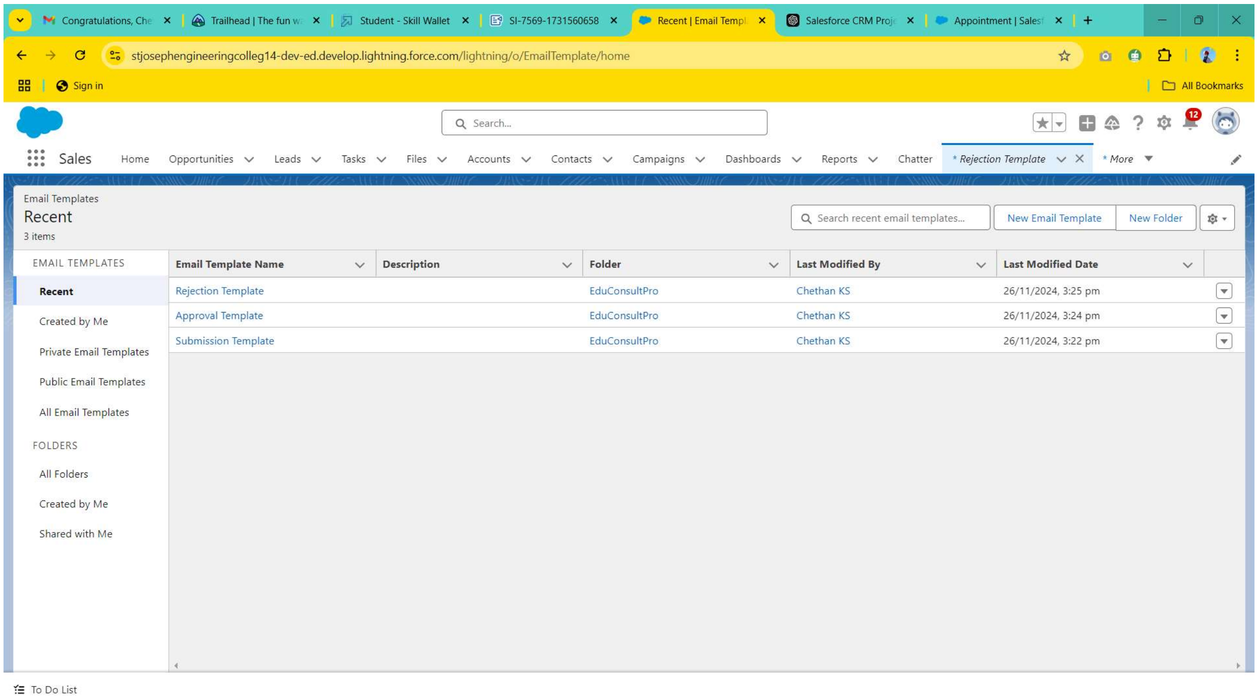


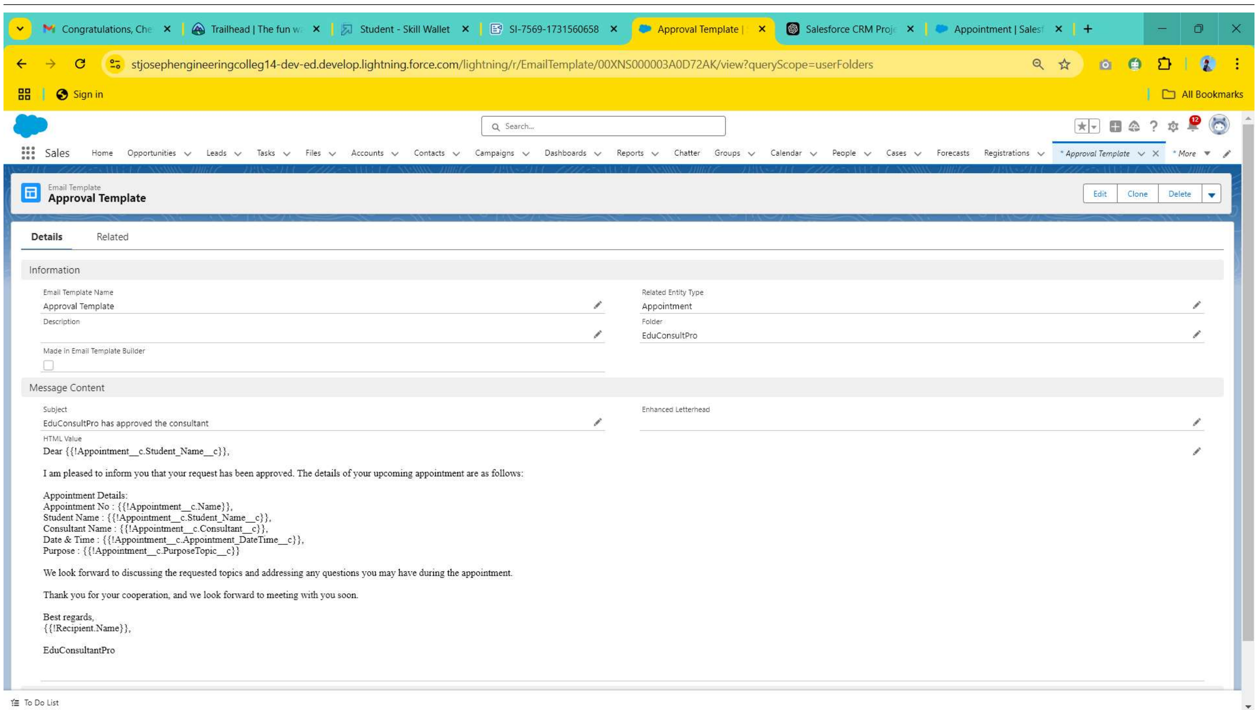
Configuring user Approval setting :

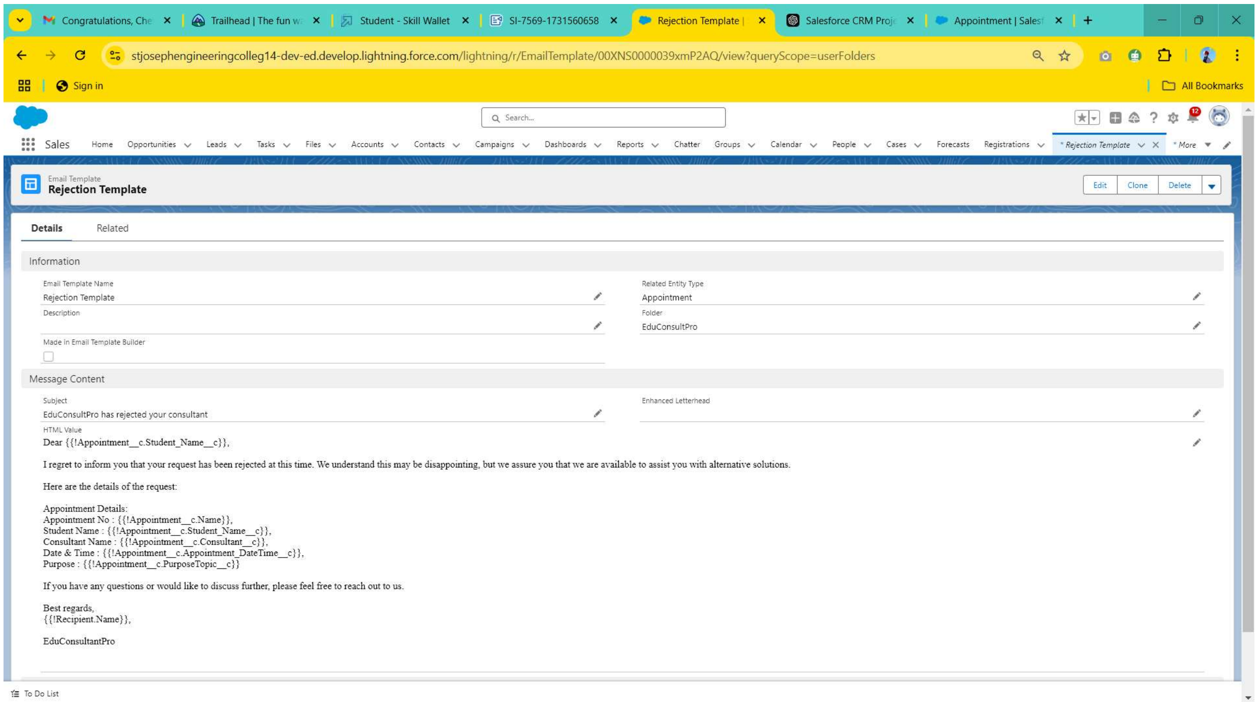


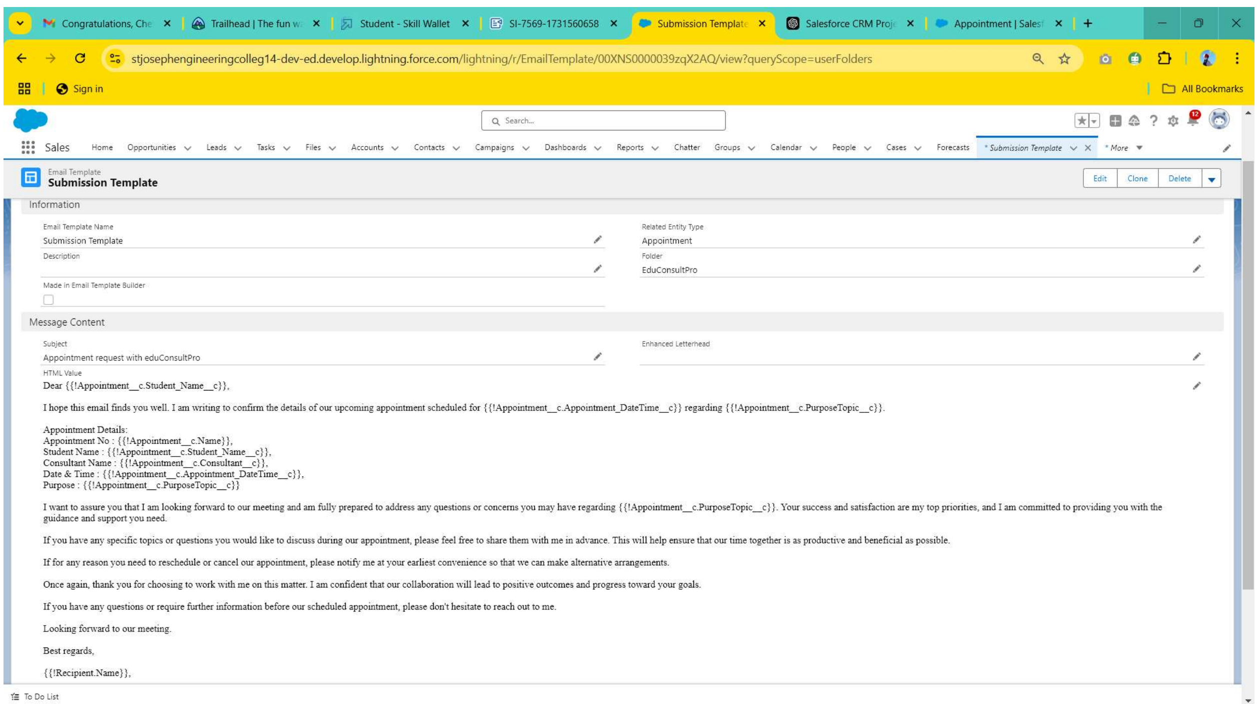
Create an Approval Process for Property Object

Create an Email Template:

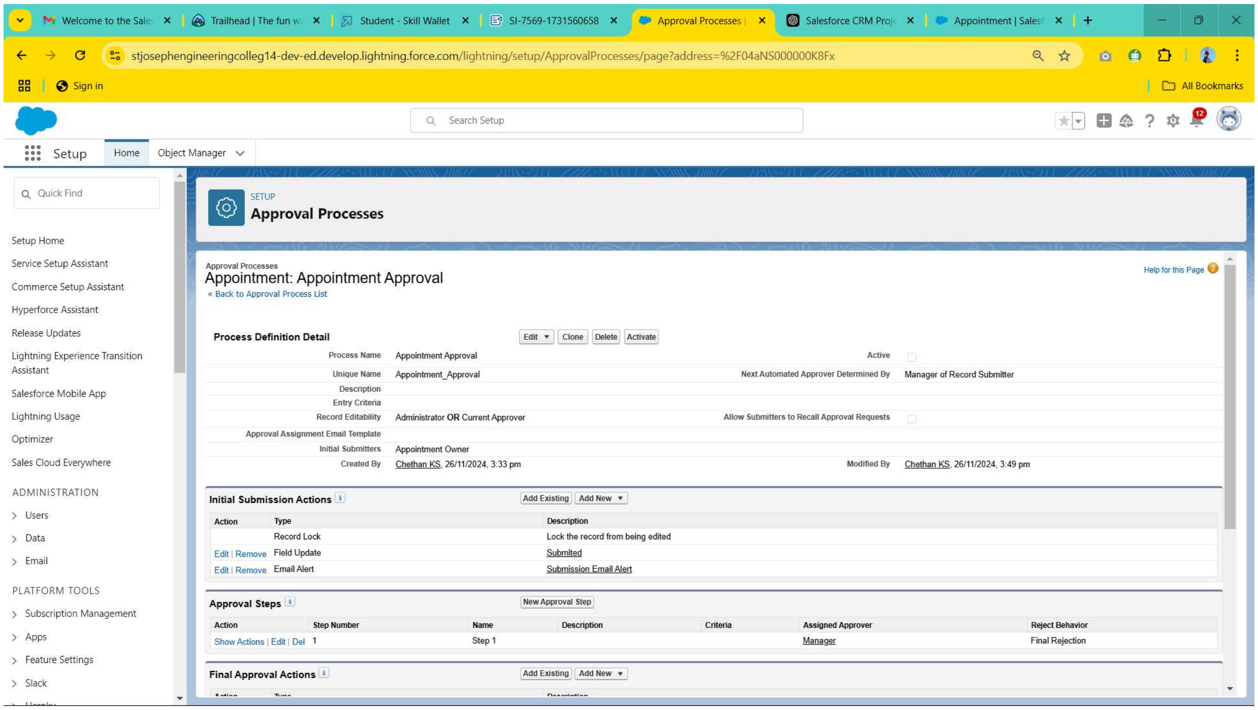


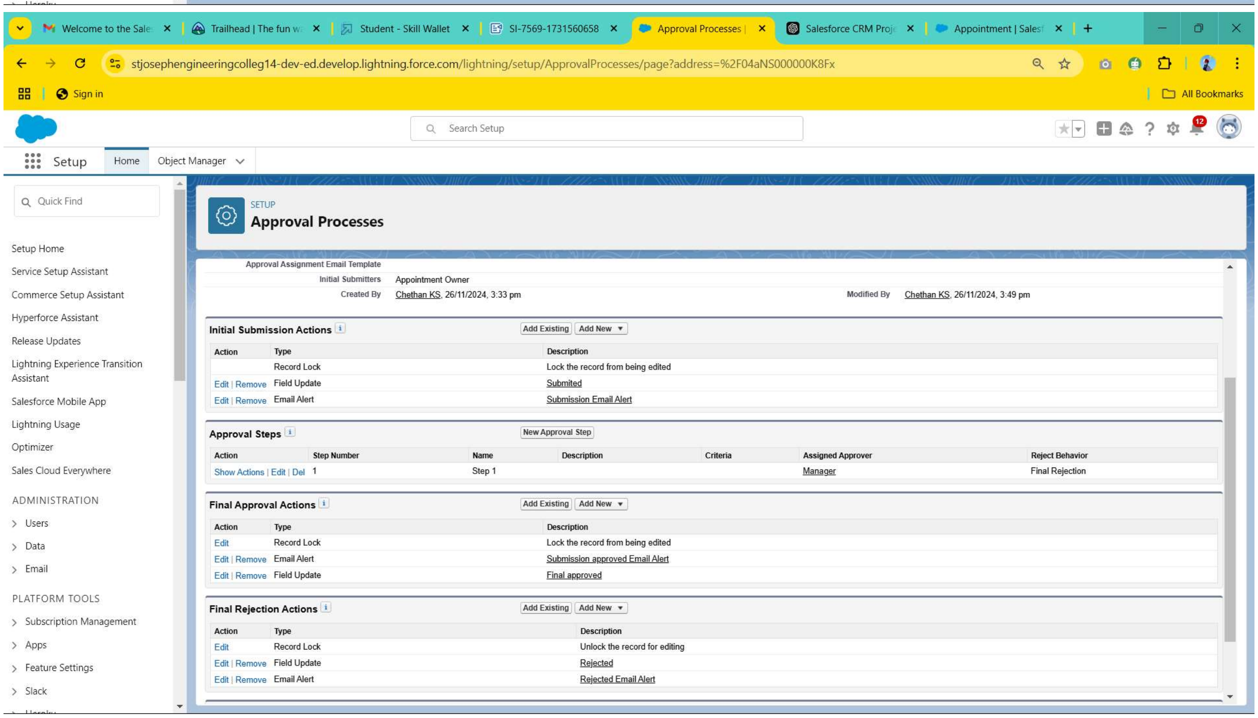



stjosephengineeringcolleg14-dev-ed.develop.lightning.force.com/lightning/r/EmailTemplate/00XNS0000039xmP2AQ/view?queryScope=userFolders
Email Template
Rejection Template
Edit
Clone
Delete
Details
Related
Information
Email Template Name
Rejection Template
Related Entity Type
Appointment
Description
Folder
EduConsultPro
Made in Email Template Builder
Message Content
Subject
EduConsultPro has rejected your consultant
Enhanced Letterhead
HTML Value
Dear {{!Appointment__c.Student_Name__c}},
I regret to inform you that your request has been rejected at this time. We understand this may be disappointing, but we assure you that we are available to assist you with alternative solutions.
Here are the details of the request:
Appointment Details:
Appointment No : {{!Appointment__c.Name}},
Student Name : {{!Appointment__c.Student_Name__c}},
Consultant Name : {{!Appointment__c.Consultant__c}},
Date & Time : {{!Appointment__c.Appointment_DateTime__c}},
Purpose : {{!Appointment__c.PurposeTopic__c}}
If you have any questions or would like to discuss further, please feel free to reach out to us.
Best regards,
{{!Recipient.Name}},
EduConsultantPro
To Do List


stjosephengineeringcolleg14-dev-ed.develop.lightning.force.com/lightning/r/EmailTemplate/00XNS0000039zqX2AQ/view?queryScope=userFolders
Email Template
Submission Template
Edit
Clone
Delete
Information
Email Template Name
Submission Template
Related Entity Type
Appointment
Description
Folder
EduConsultPro
Made in Email Template Builder
Message Content
Subject
Appointment request with eduConsultPro
Enhanced Letterhead
HTML Value
Dear {{!Appointment__c.Student_Name__c}},
I hope this email finds you well. I am writing to confirm the details of our upcoming appointment scheduled for {{!Appointment__c.Appointment_DateTime__c}} regarding {{!Appointment__c.PurposeTopic__c}}.
Appointment Details:
Appointment No : {{!Appointment__c.Name}},
Student Name : {{!Appointment__c.Student_Name__c}},
Consultant Name : {{!Appointment__c.Consultant__c}},
Date & Time : {{!Appointment__c.Appointment_DateTime__c}},
Purpose : {{!Appointment__c.PurposeTopic__c}}
I want to assure you that I am looking forward to our meeting and am fully prepared to address any questions or concerns you may have regarding {{!Appointment__c.PurposeTopic__c}}. Your success and satisfaction are my top priorities, and I am committed to providing you with the guidance and support you need.
If you have any specific topics or questions you would like to discuss during our appointment, please feel free to share them with me in advance. This will help ensure that our time together is as productive and beneficial as possible.
If for any reason you need to reschedule or cancel our appointment, please notify me at your earliest convenience so that we can make alternative arrangements.
Once again, thank you for choosing to work with me on this matter. I am confident that our collaboration will lead to positive outcomes and progress toward your goals.
If you have any questions or require further information before our scheduled appointment, please don't hesitate to reach out to me.
Looking forward to our meeting.
Best regards,
{{!Recipient.Name}},
To Do List

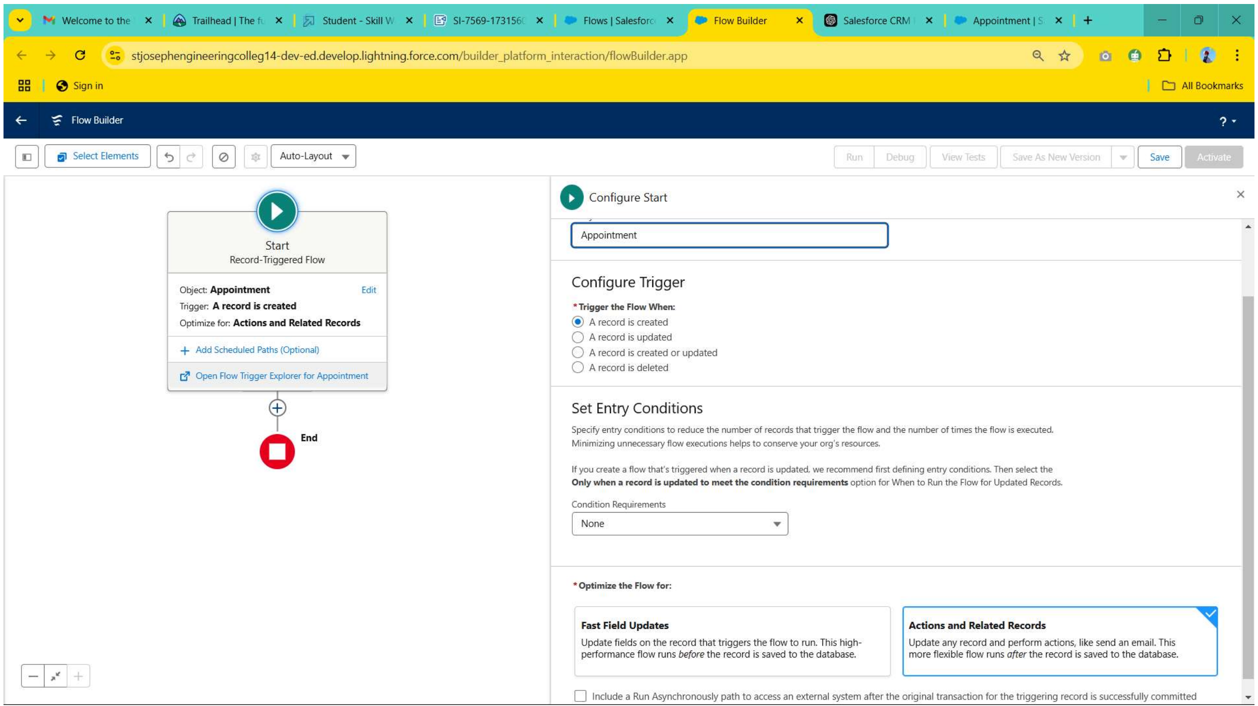
Create an approval process:



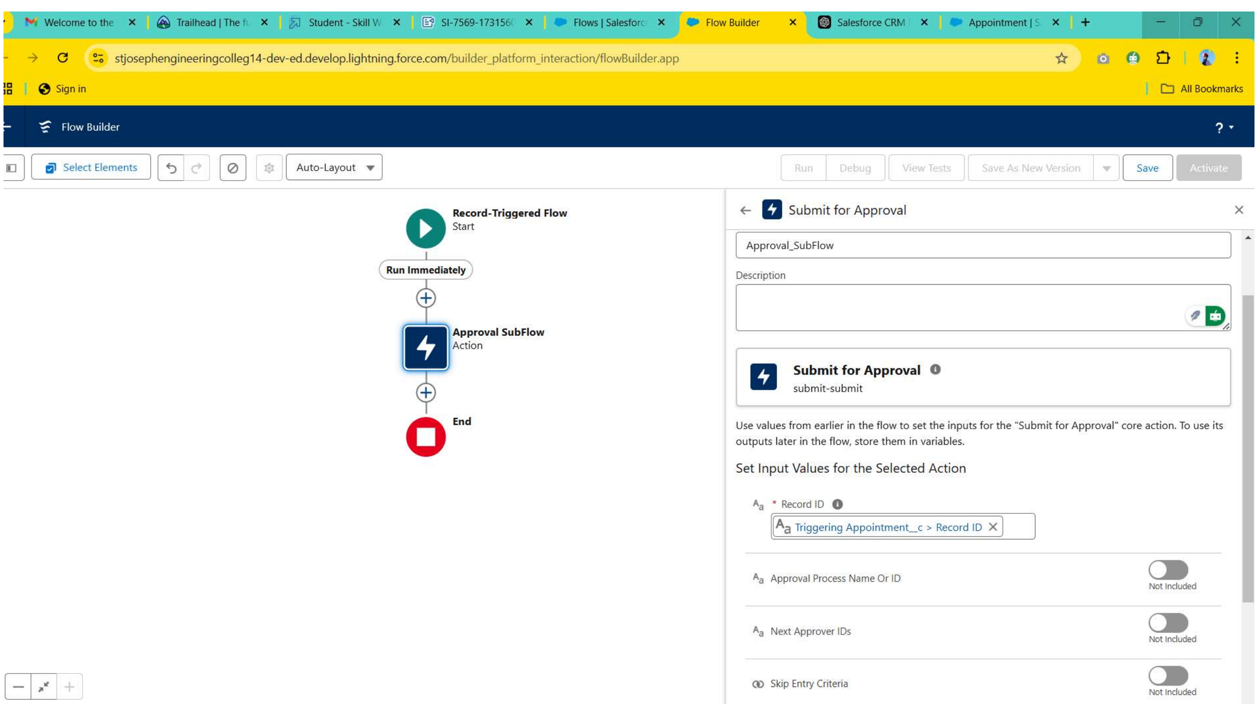


Create a Record Triggered Flow

Configure the Start Element

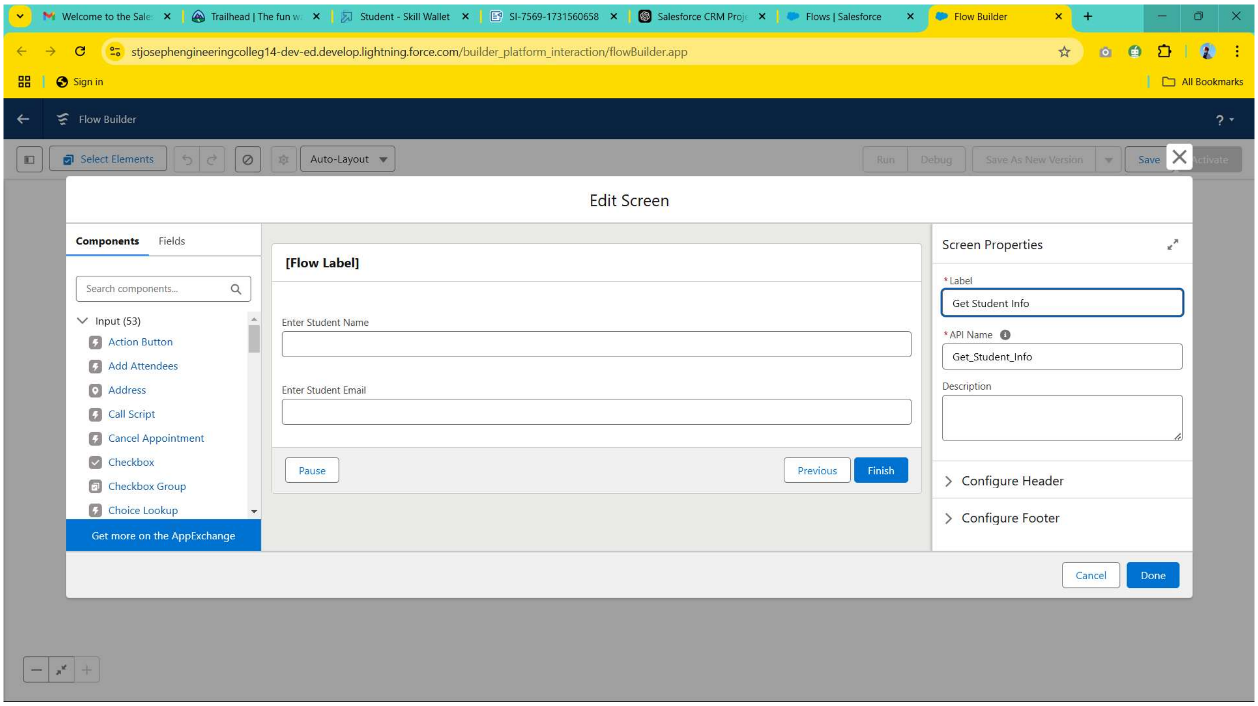


Add an Action Element

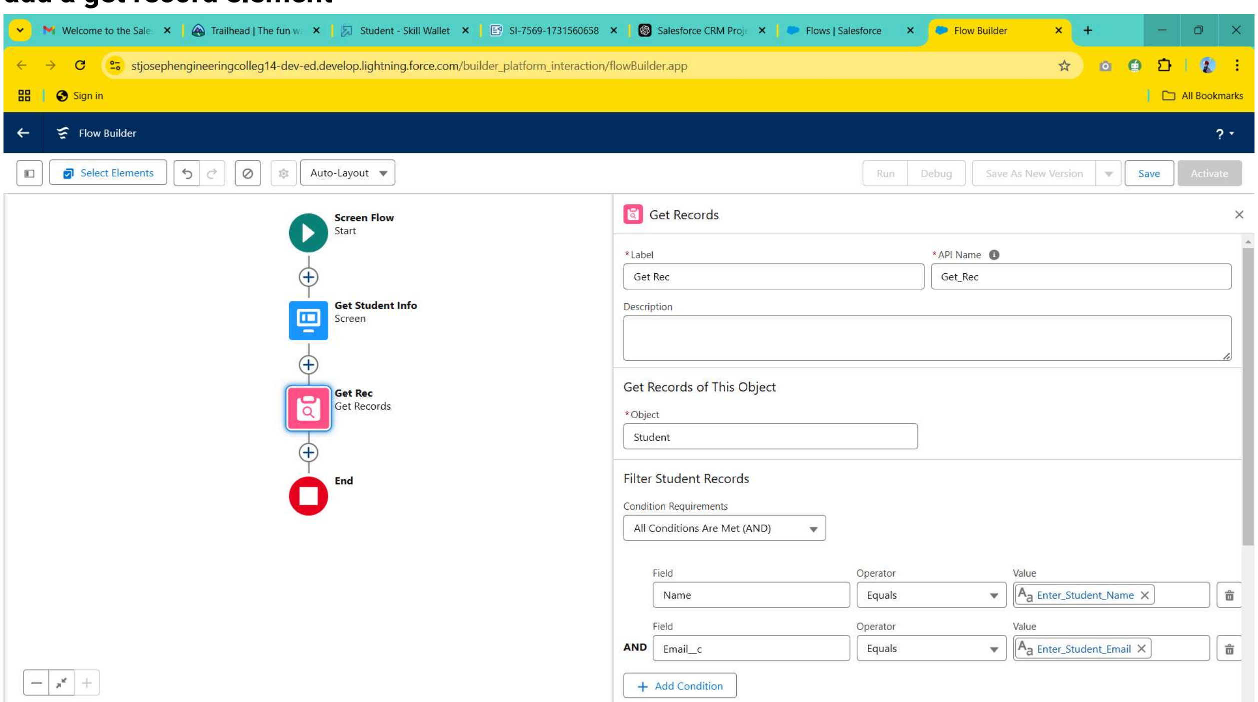


Create a ScreenFlow for Existing Student to Book an Appointment

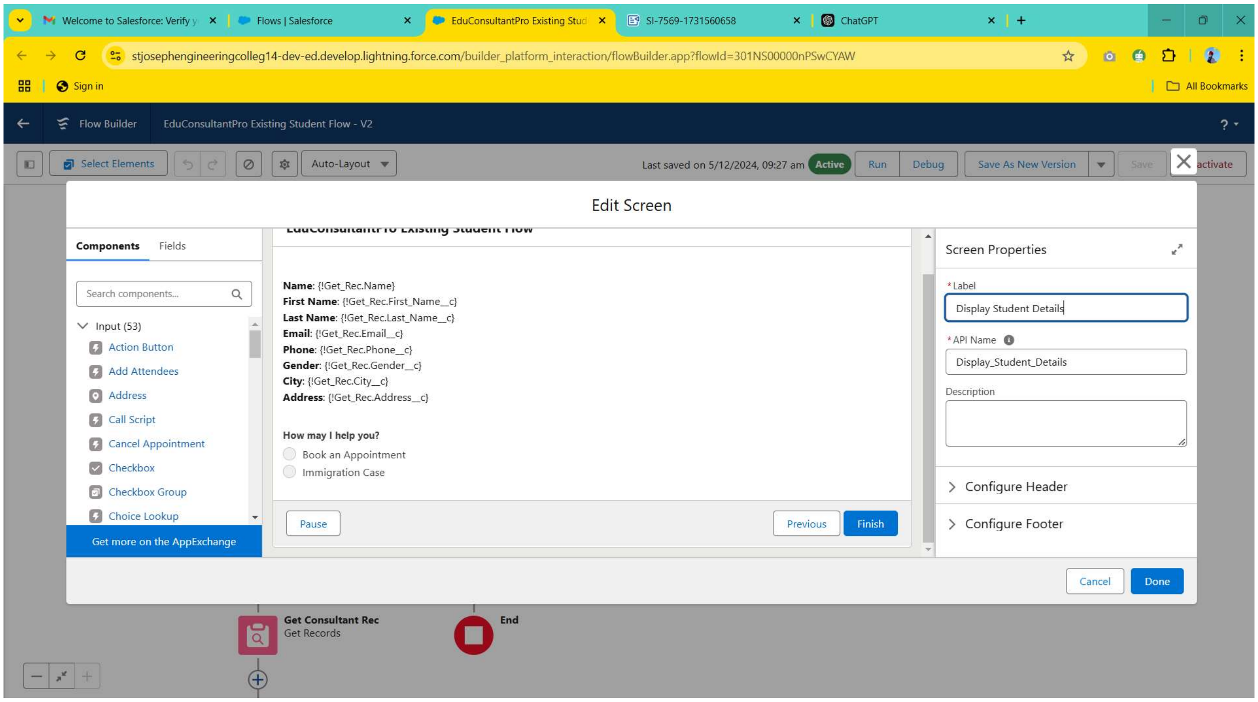
Add screen element



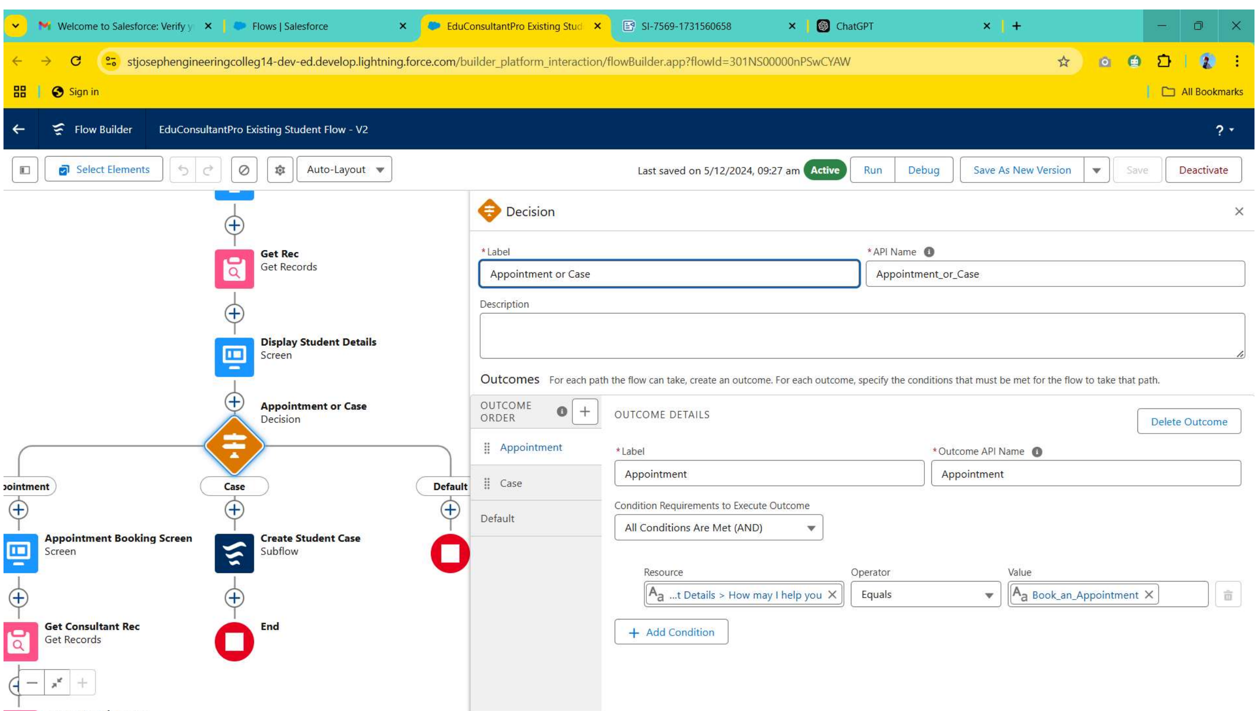
add a get record element

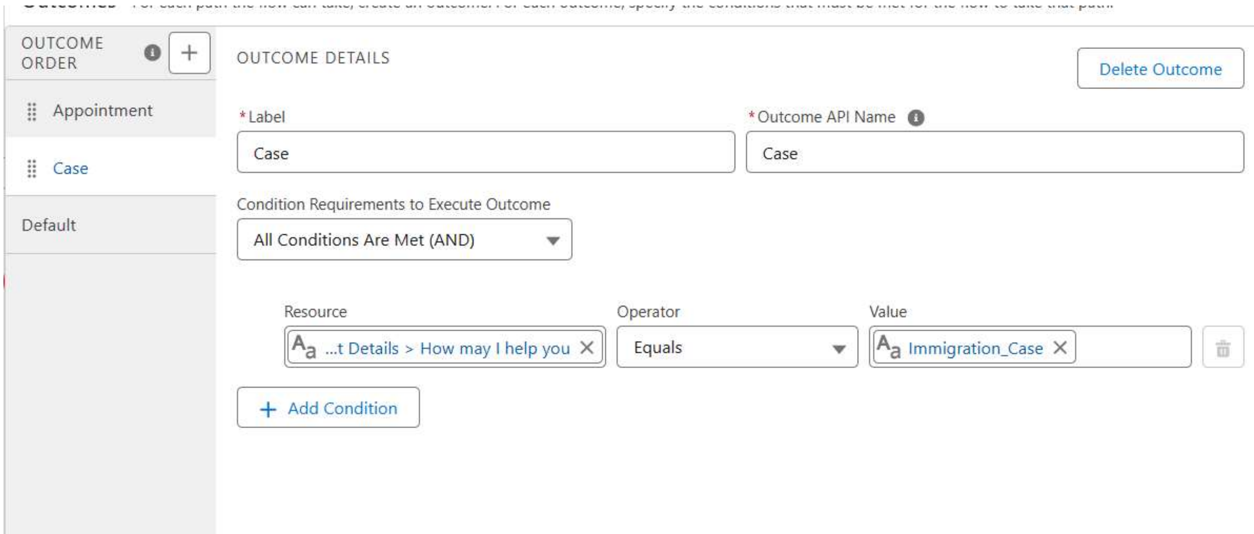


Display Student details

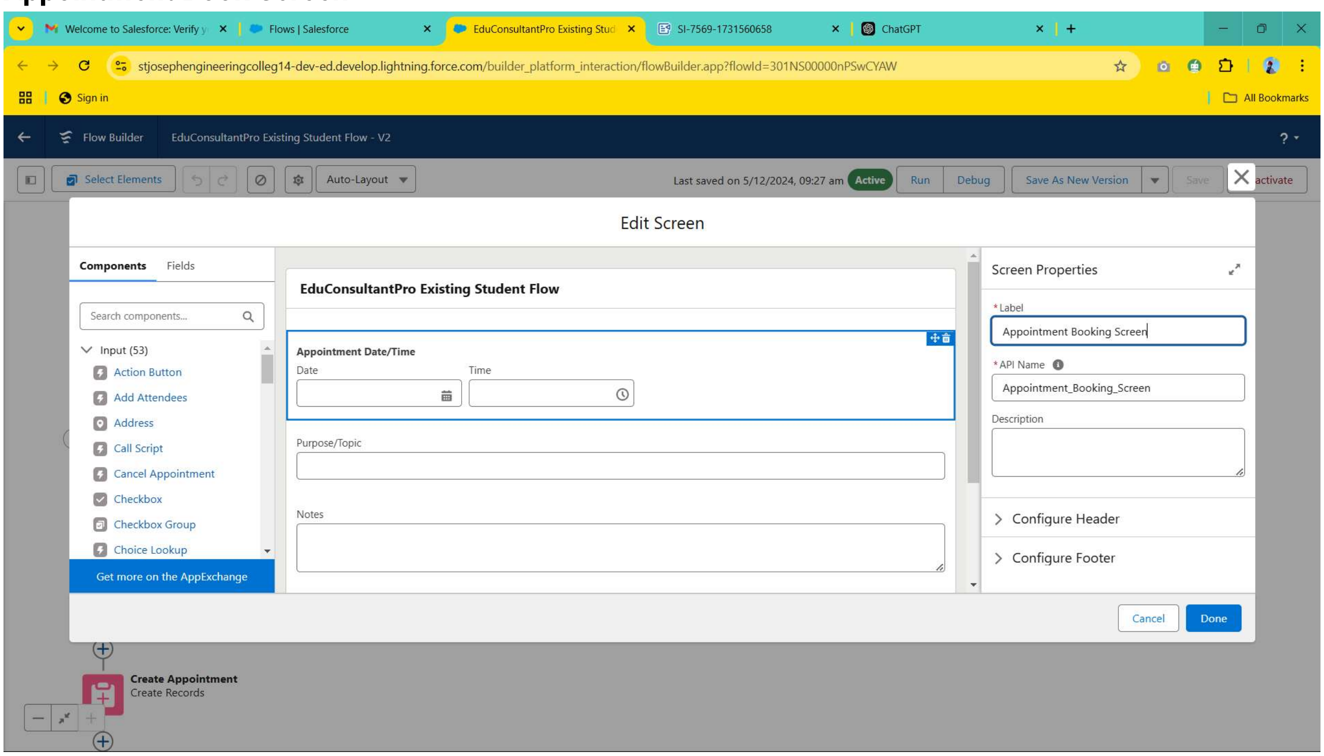


Add decision element

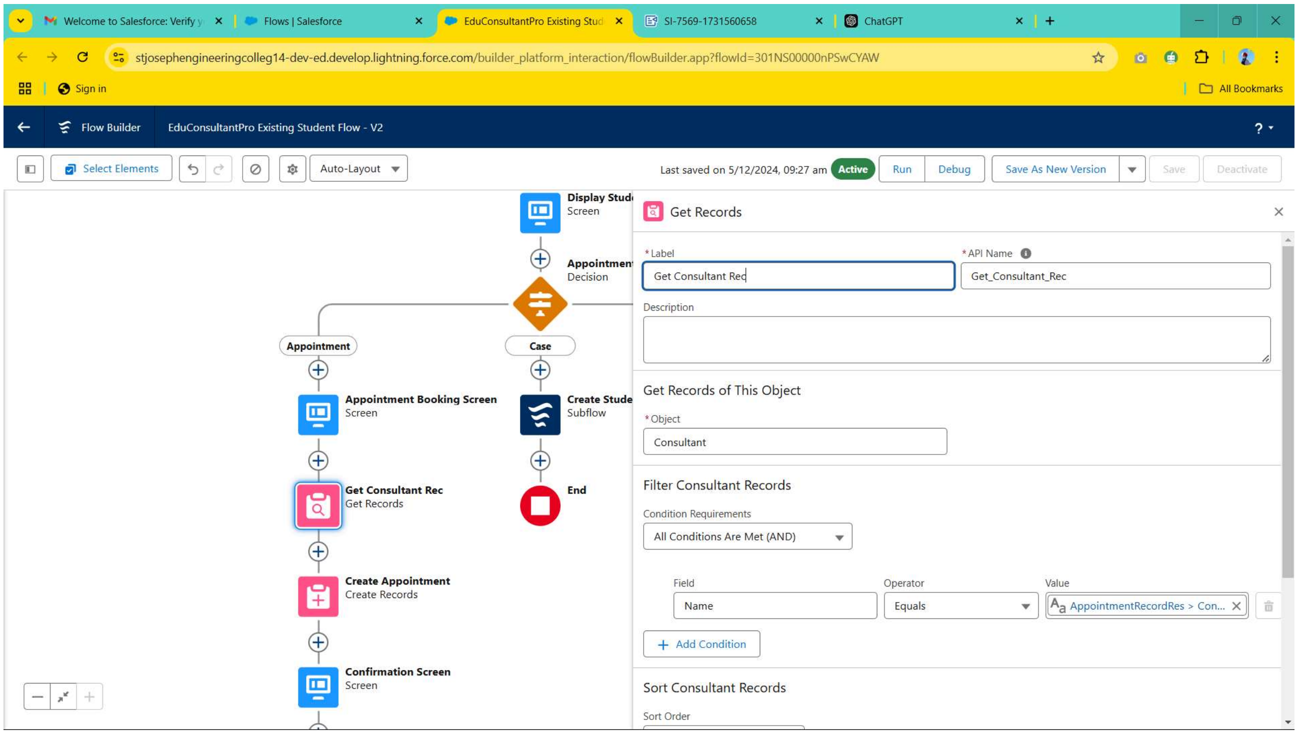




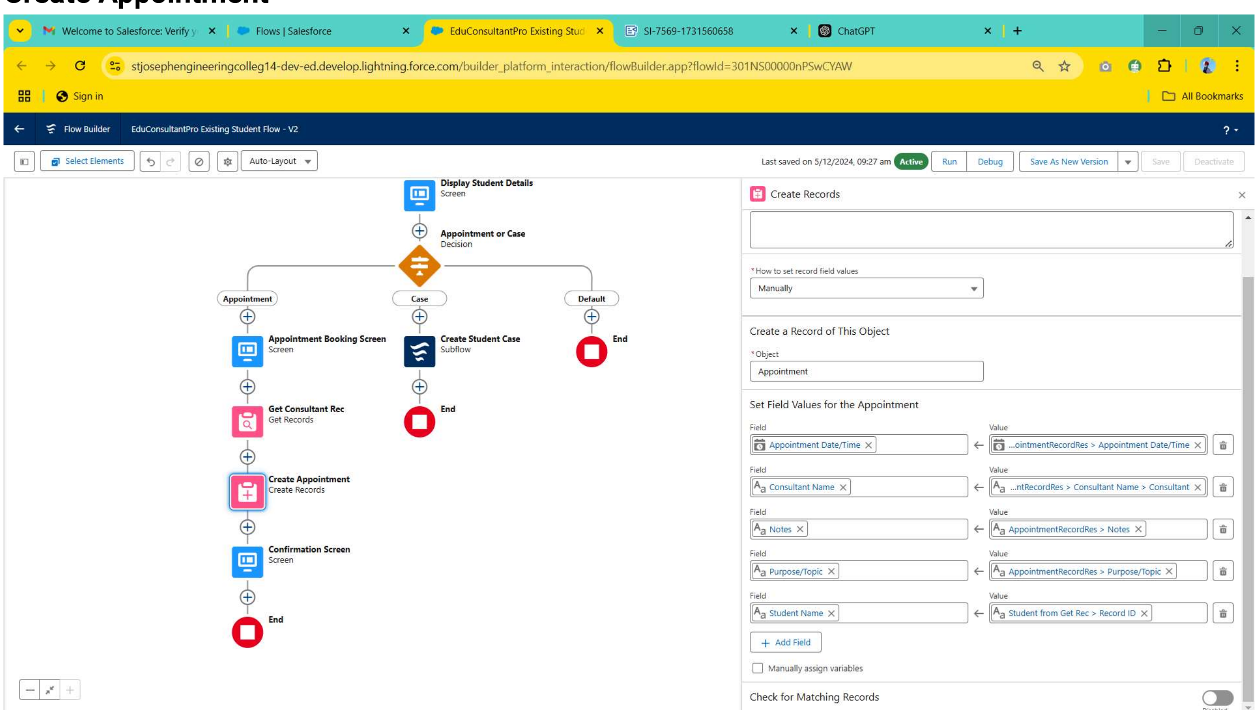
Appointment Book Screen



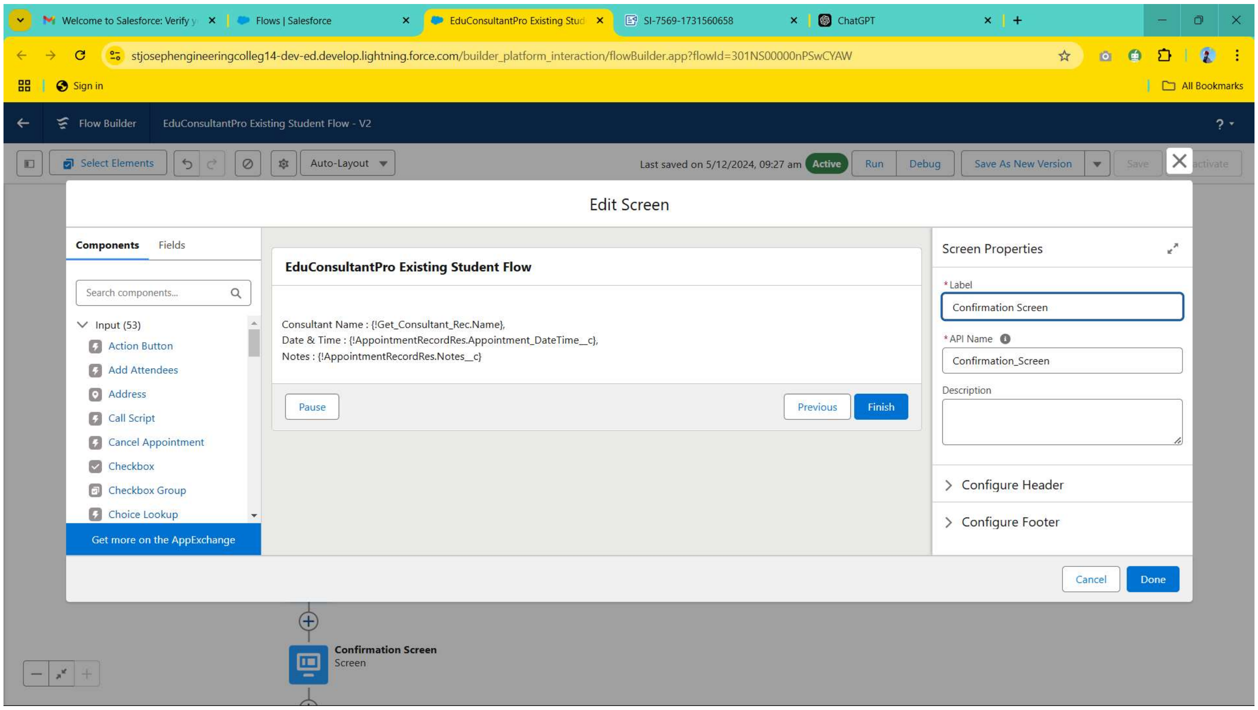
Get Records



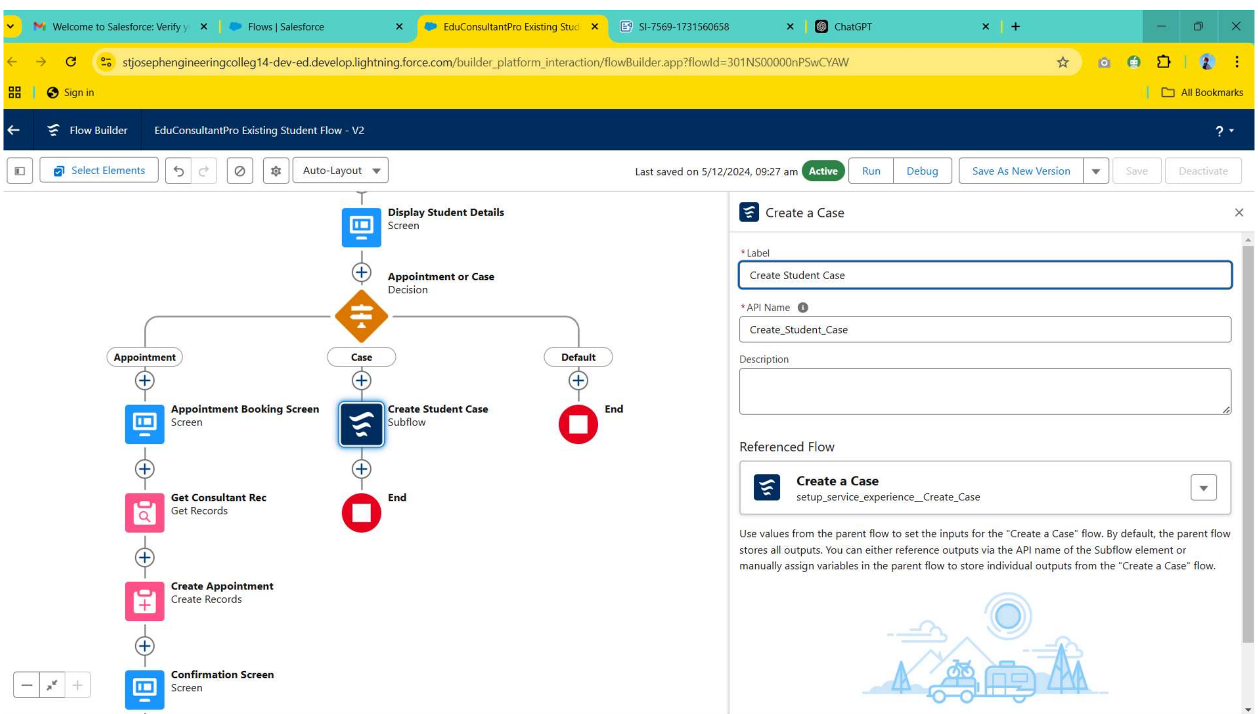
Create Appointment



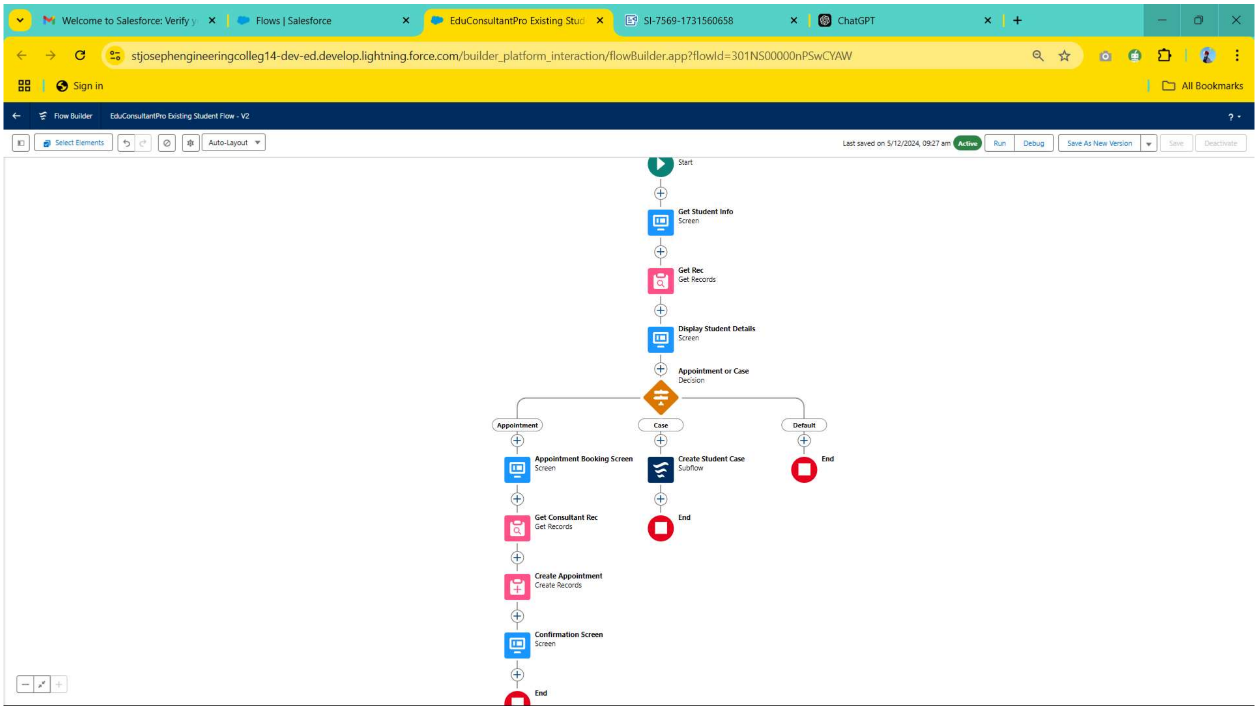
Confirmation Screen



Create a subflow

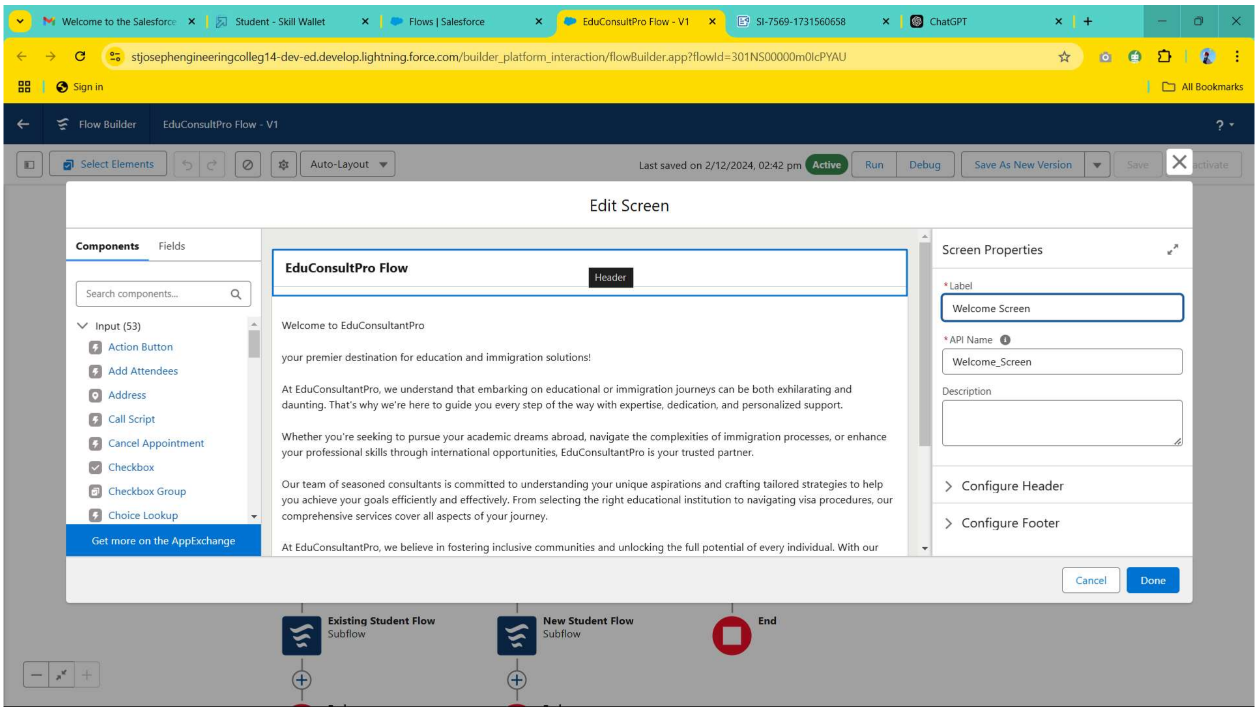


Entire Flow

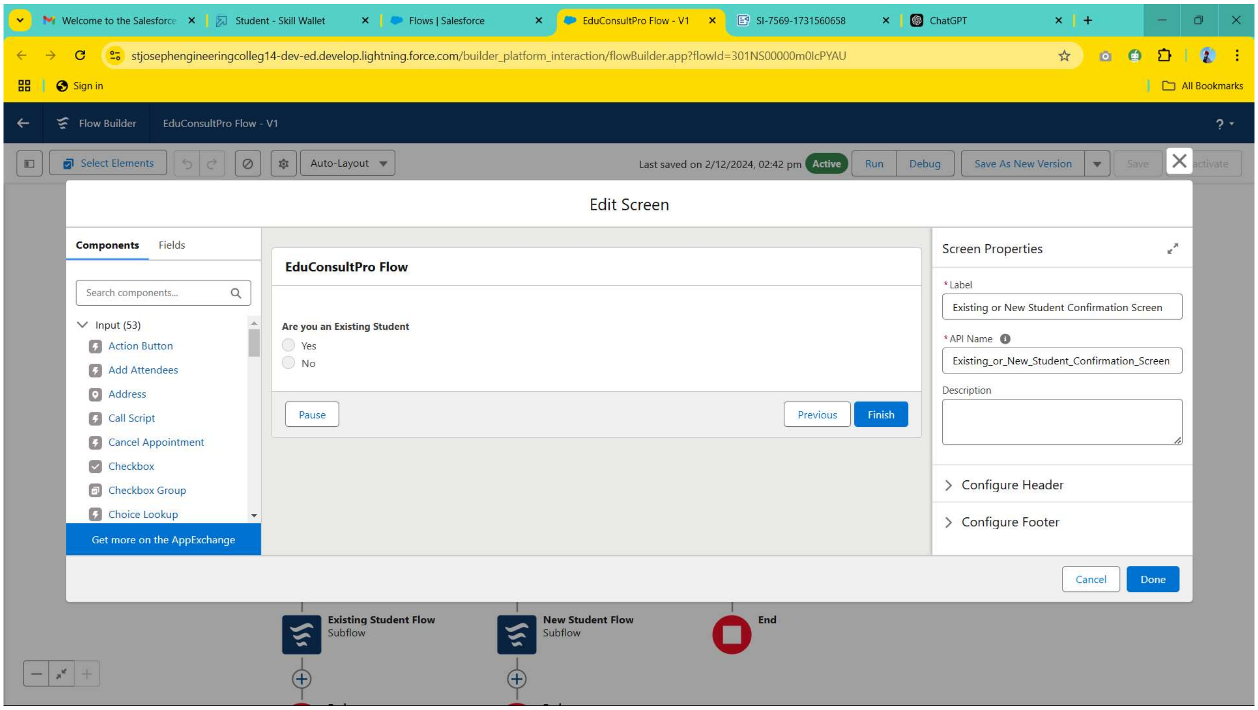


Create a ScreenFlow to Combine all the flows at one place

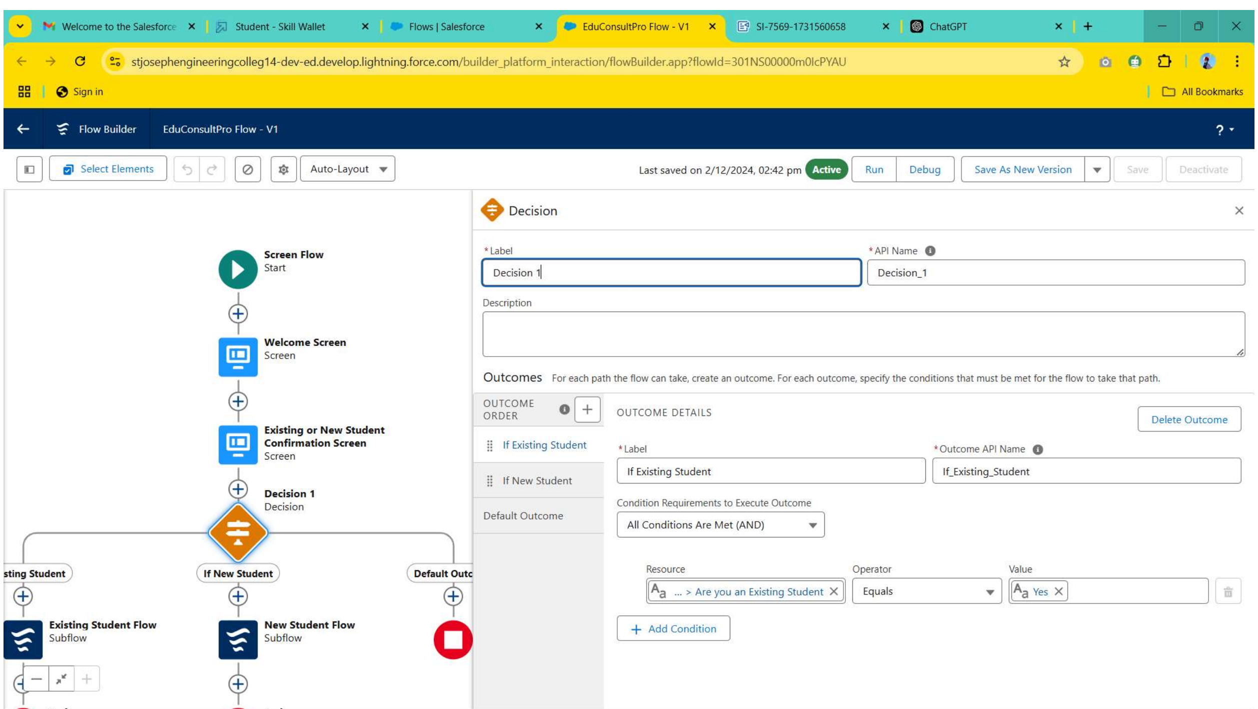
Add a Welcome screen element



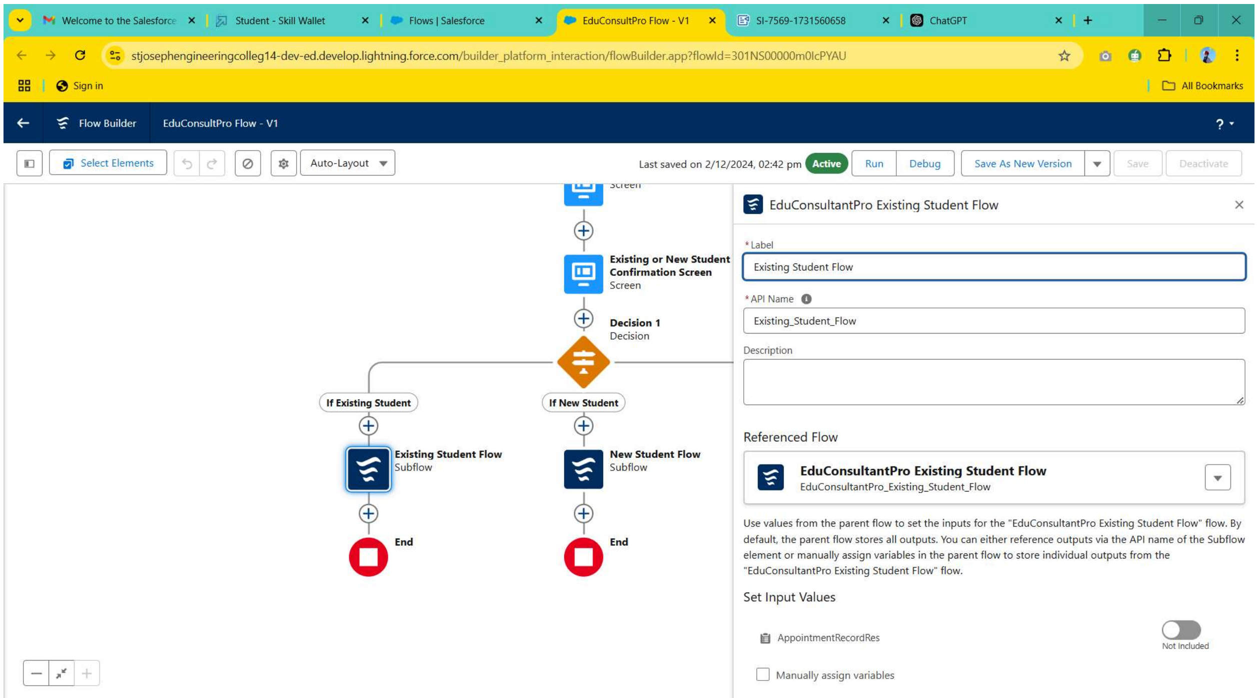
Add a screen element to ask weather he is new student or old student



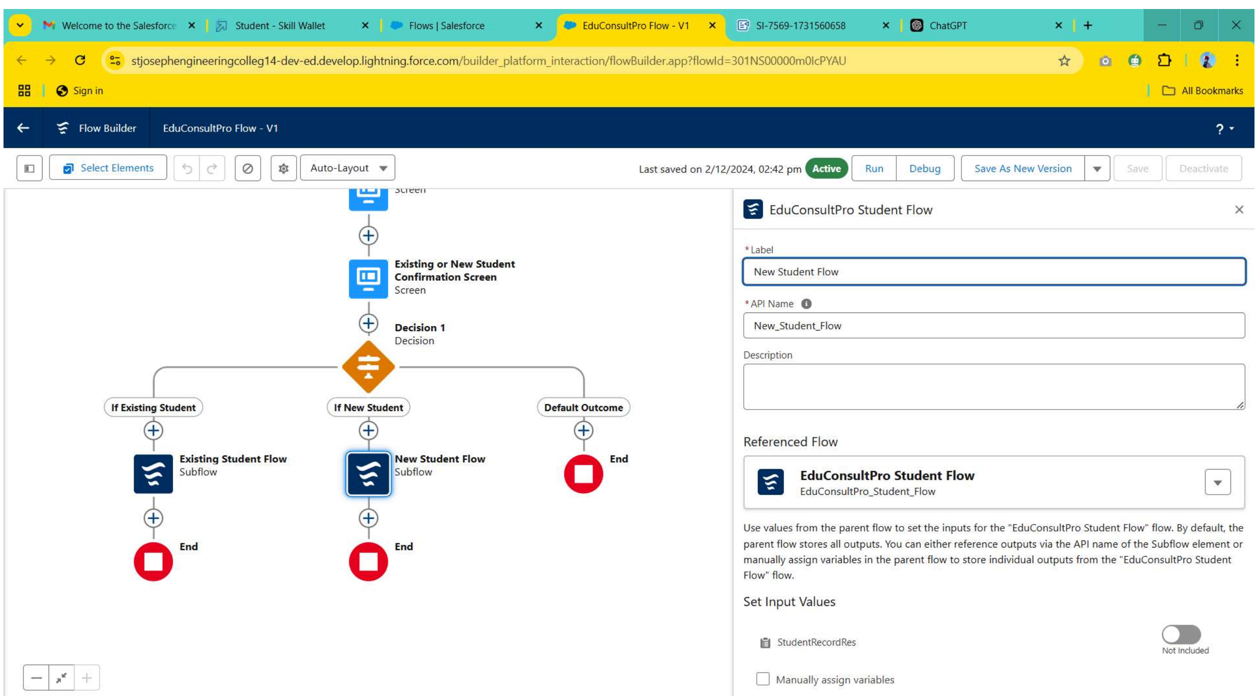
Add decision element

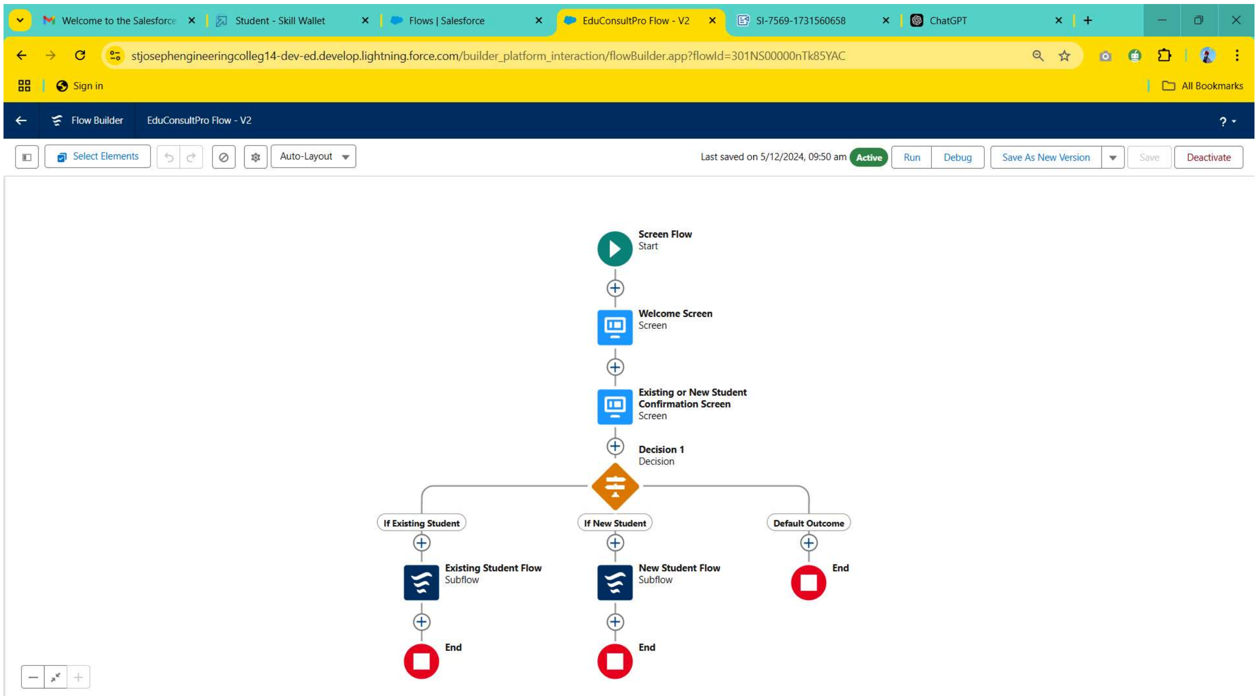


Add a subflow if it is a existing student

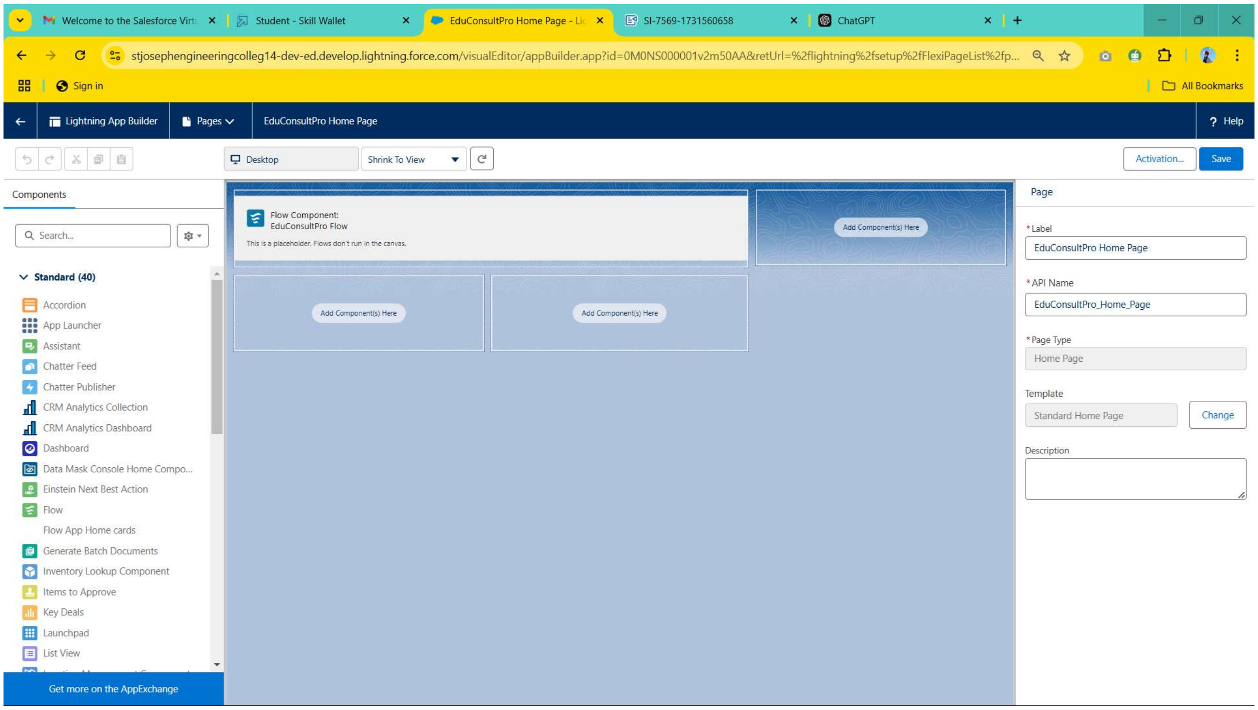


Add a subflow if it is new student




Welcome to the Salesforce
Student - Skill Wallet
Flows | Salesforce
EduConsultPro Flow - V2
SI-7569-1731560658
ChatGPT
stjosephengineeringcolleg14-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301NS00000nTk85YAC
Sign in
All Bookmarks
Flow Builder
EduConsultPro Flow - V2
Select Elements
Auto-Layout
Last saved on 5/12/2024, 09:50 am
Active
Run
Debug
Save As New Version
Save
Deactivate
Screen Flow
Start
Welcome Screen
Screen
Existing or New Student
Confirmation Screen
Screen
Decision 1
Decision
If Existing Student
If New Student
Default Outcome
Existing Student Flow
Subflow
New Student Flow
Subflow
End
End
End

Create a lightning app page



CONCLUSION:

The EduConsultPro Home Page is a dynamic and efficient solution that centralizes and streamlines the processes essential to educational consultancy and immigration services. By combining intuitive navigation, automated workflows, and seamless integration of tools like Flows, Appointment Management, and Approval Processes, it ensures that both administrators and consultants can operate with maximum productivity and precision.

With its user-friendly interface and powerful features, the EduConsultPro Home Page empowers users to manage student records, consultant activities, and appointment workflows effortlessly. This not only saves time but also enhances the overall experience for all stakeholders, ensuring that every student receives personalized and timely support on their journey.

At EduConsultPro, we are committed to providing innovative solutions that simplify complex processes while maintaining quality and accuracy. The Home Page serves as the gateway to success, helping users achieve their goals and aspirations efficiently.