A CRM Application to Manage the Services offered by an Institution

1.Project Overview

This project is focused on developing EduConsultPro, a Salesforce CRM-based application designed to streamline the operations of EduConsultPro Institute. The primary challenge addressed is managing and optimizing processes related to student admissions, inquiries, and expert consulting services.

The goal is to deliver a comprehensive solution by leveraging Salesforce CRM capabilities, including customized objects, flows, and user-friendly interfaces. Through this project, we aim to enhance operational efficiency, user experience, and data accuracy, supporting the institute's long-term goals of providing seamless and efficient services to students and consultants.

2.Objectives

Business Goals

- Streamline the admission and consultation processes at EduConsultPro Institute.
- Enhance the efficiency of managing student inquiries and appointments.
- Provide a centralized platform for tracking student and consultant interactions.

Specific Outcomes

- Develop and implement a Salesforce CRM application with custom objects for managing Students, Courses, Appointments, Consultants, and Registrations.
- Design and execute automated flows for new and existing student registration, case creation, and appointment management.
- Improve data accuracy by integrating validation mechanisms and lookup relationships between objects.
- Ensure user accessibility by creating a responsive application that supports both

desktop and mobile platforms.
- Enable seamless communication with students through automated email notifications.

3.Salesforce Key Features and Concepts Utilized

1. Custom Objects
   - Created objects for Students, Courses, Appointments, Consultants, Cases, and Registrations to manage data effectively.
   - Established lookup relationships between objects to link related records seamlessly (e.g., Student-Appointment and Student-Case).
2. Flows
   - Implemented various screen and autolaunched flows, including:
     - EduConsultPro Flow: Determines if a student is new or existing and initiates appropriate subflows.
     - EduConsultPro Student Flow: Handles new student registrations, course selection, and email notifications.
     - EduConsultantPro Existing Student Flow: Fetches existing student details and facilitates appointments or case creation.
     - EduConsultPro Approval Flow: Automates approval processes.
3. Validation and Data Accuracy
   - Integrated validation rules and field requirements to ensure accurate data entry.
4. Automation
   - Automated email notifications for key events, such as course registration confirmations.
5. User Management
   - Configured roles and profiles, including creating a user for the Consultant role with tailored permissions.
6. Lightning App Builder
   - Designed the EduConsultPro app for desktop and mobile platforms, incorporating navigation items such as Home, Appointment, Registration, Case, Student, Course, and Consultant.
7. Trailhead Integration
   - Leveraged Trailhead modules to gain knowledge and guidance on Salesforce development and features.
8. Testing and Debugging

- Utilized the Run and Debug options to validate flow functionality and identify issues during development.

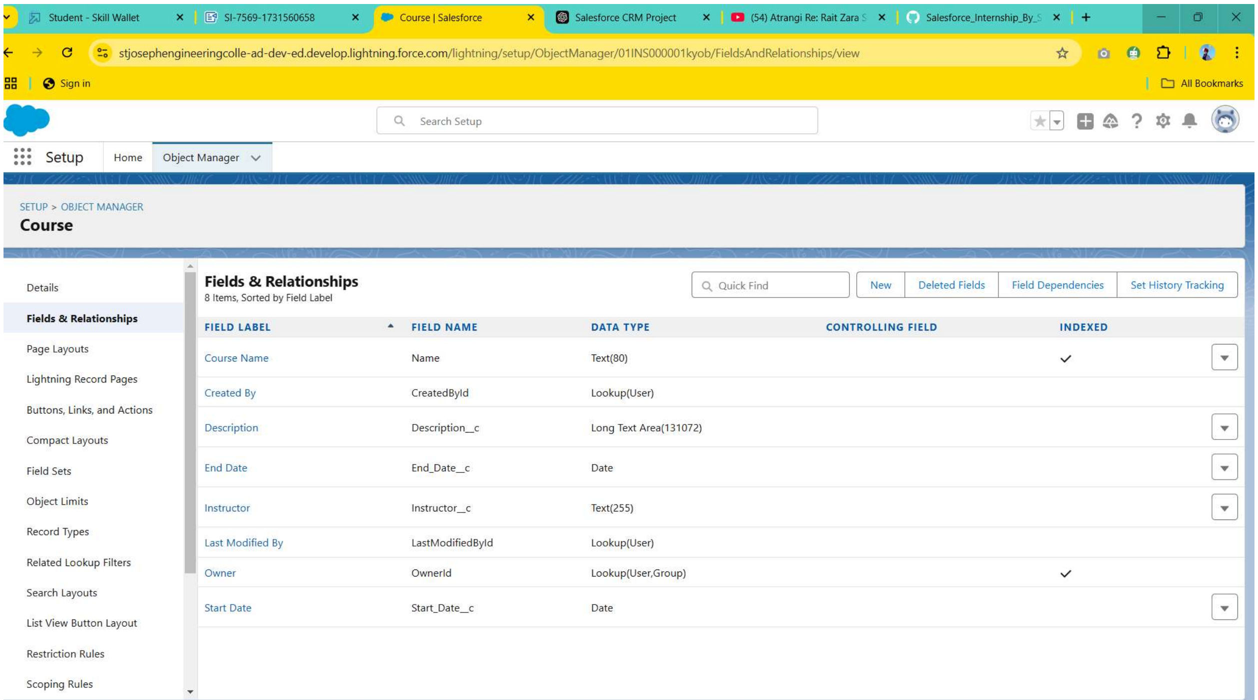
4.Detailed Steps to Solution Design

- Custom Objects Created:
    - Student: Stores student details (e.g., Name, Email, Phone, Address).
    - Course: Tracks course offerings (e.g., Course Name, Description, Fees).
    - Appointment: Manages consultations with consultants, linked to students and consultants via lookup relationships.
    - Consultant: Stores consultant details (e.g., Name, Expertise).
    - Registration: Stores course enrollment data linked to students and courses.
    - Case: Captures student inquiries and issues related to immigration or visa applications.
- Key Relationships:
    - Student → Appointment: Lookup Relationship.
    - Student → Case: Lookup Relationship.
    - Student → Registration → Course: Registration object links Student and Course.

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)

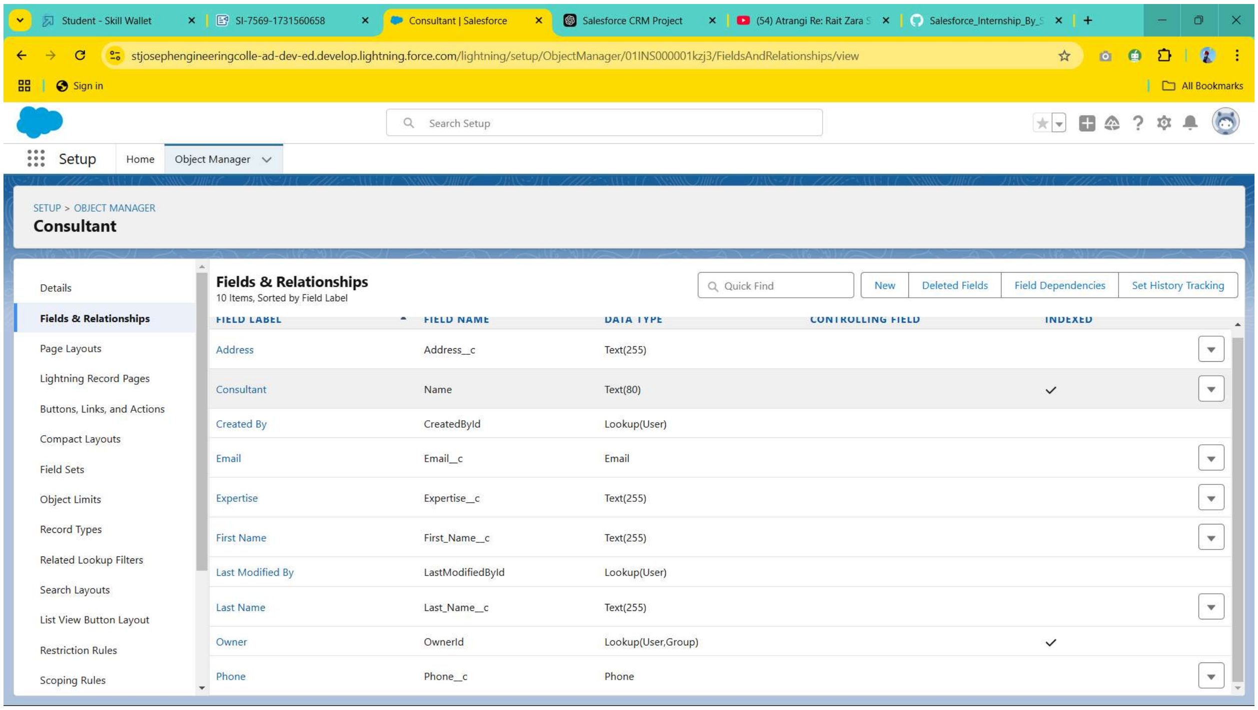
Email(Email)

Expertise(Text)

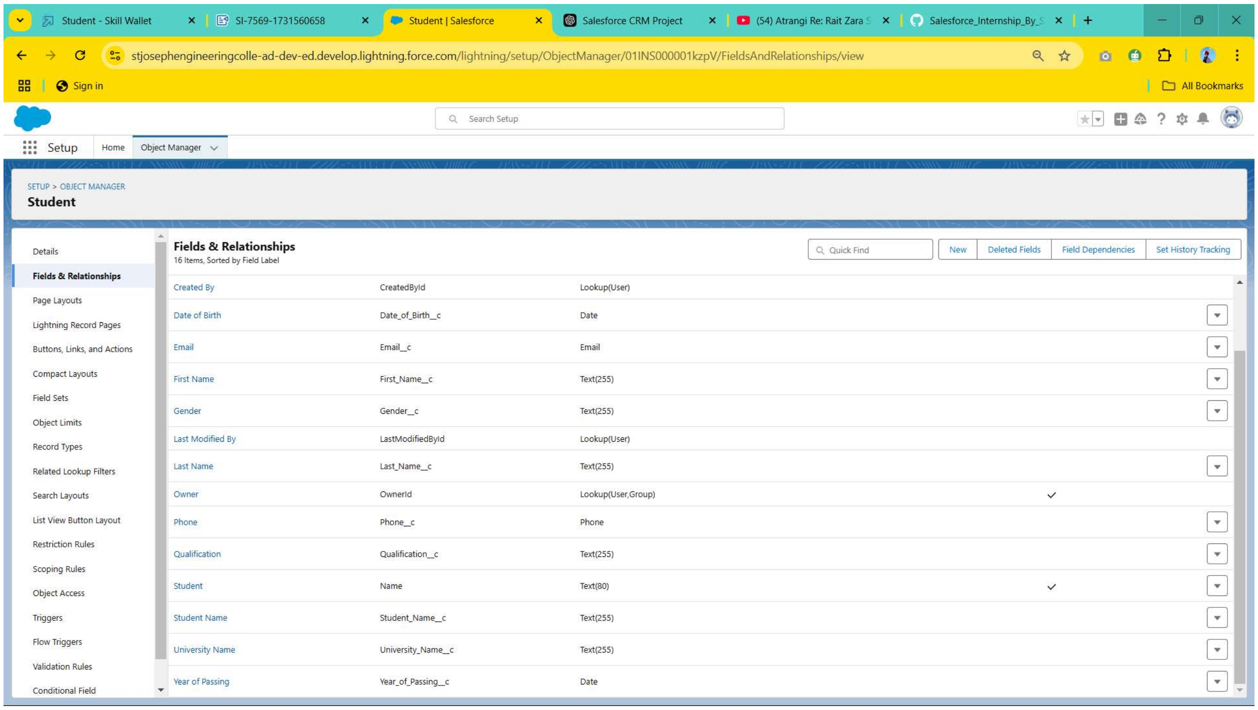
First Name(Text)

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
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Student | Salesforce
Salesforce CRM Project
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Salesforce_Internship_By_
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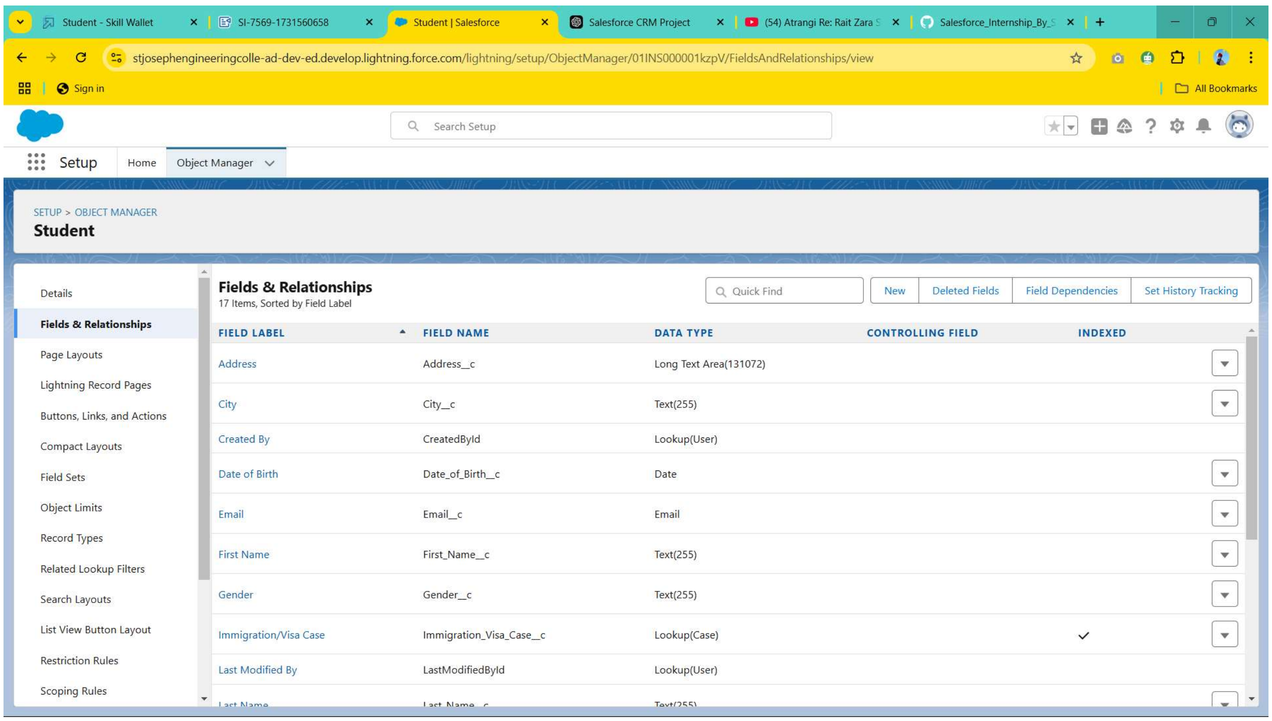
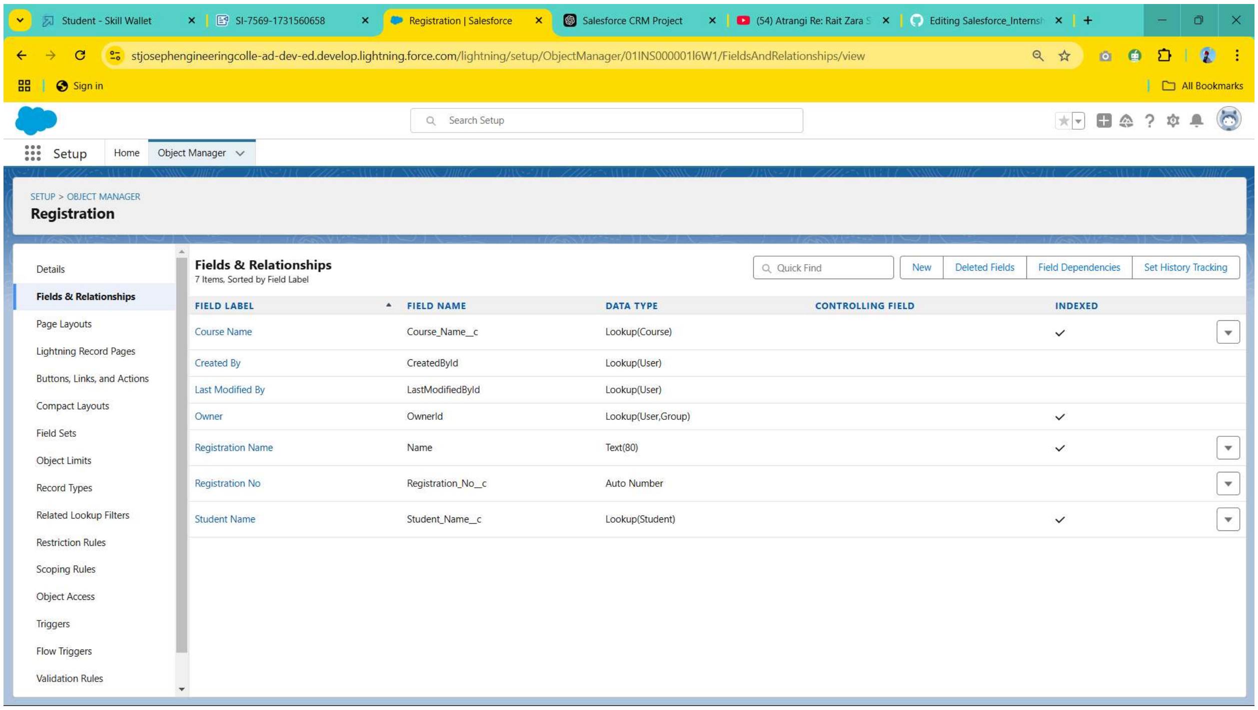
Sign in
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
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

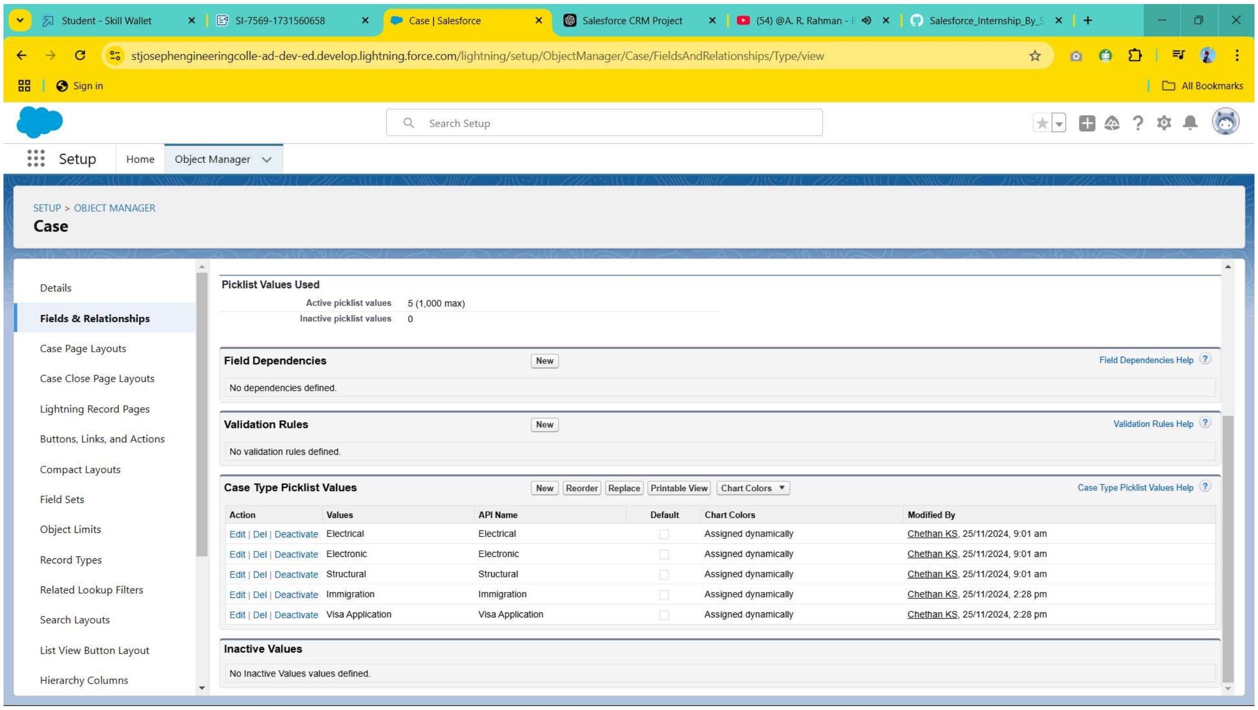
Appointment Object:
Fields:
Appointment Date/Time(Date/Time)
Appointment No(Number)
Notes(Long TextArea)
Purpose(Text)
Status(Picklist)

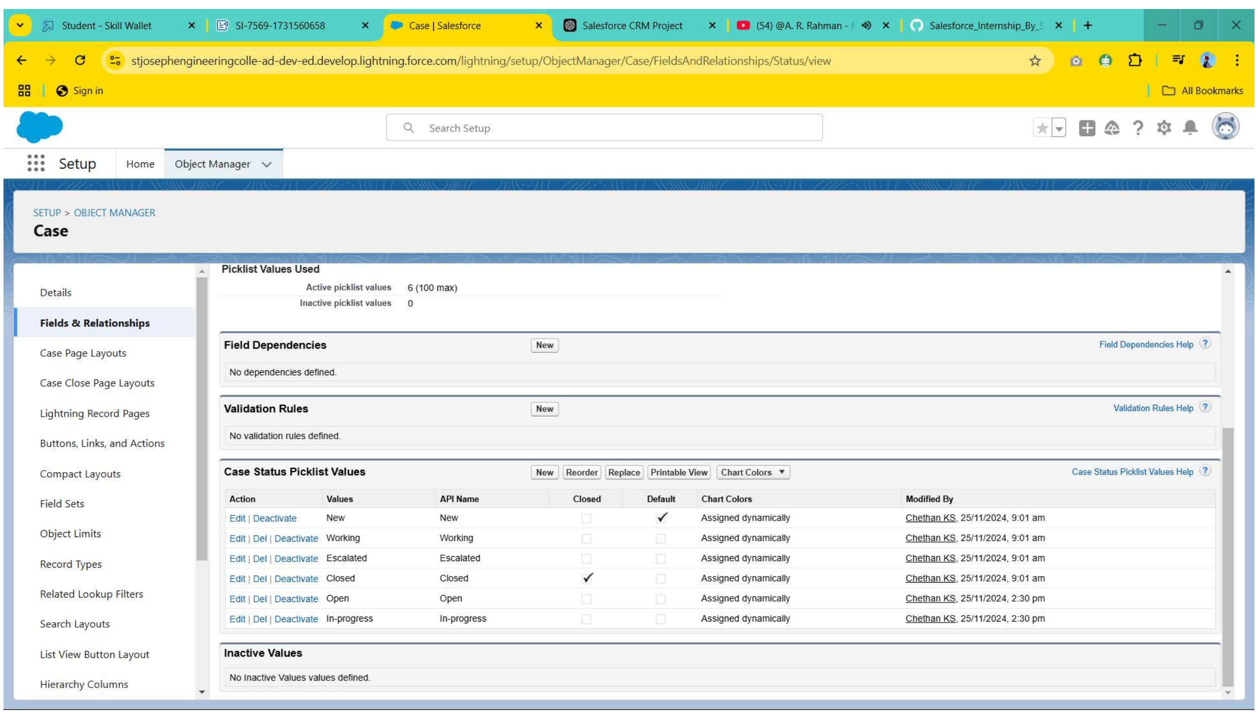


Registration Object:

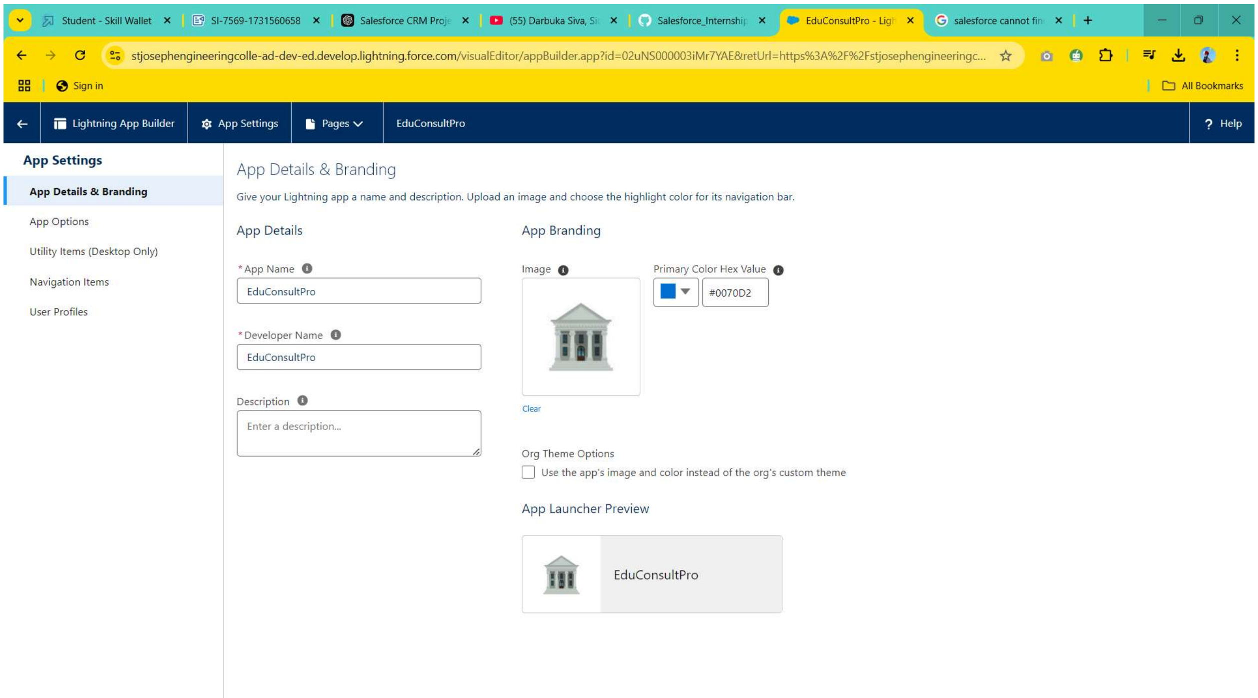


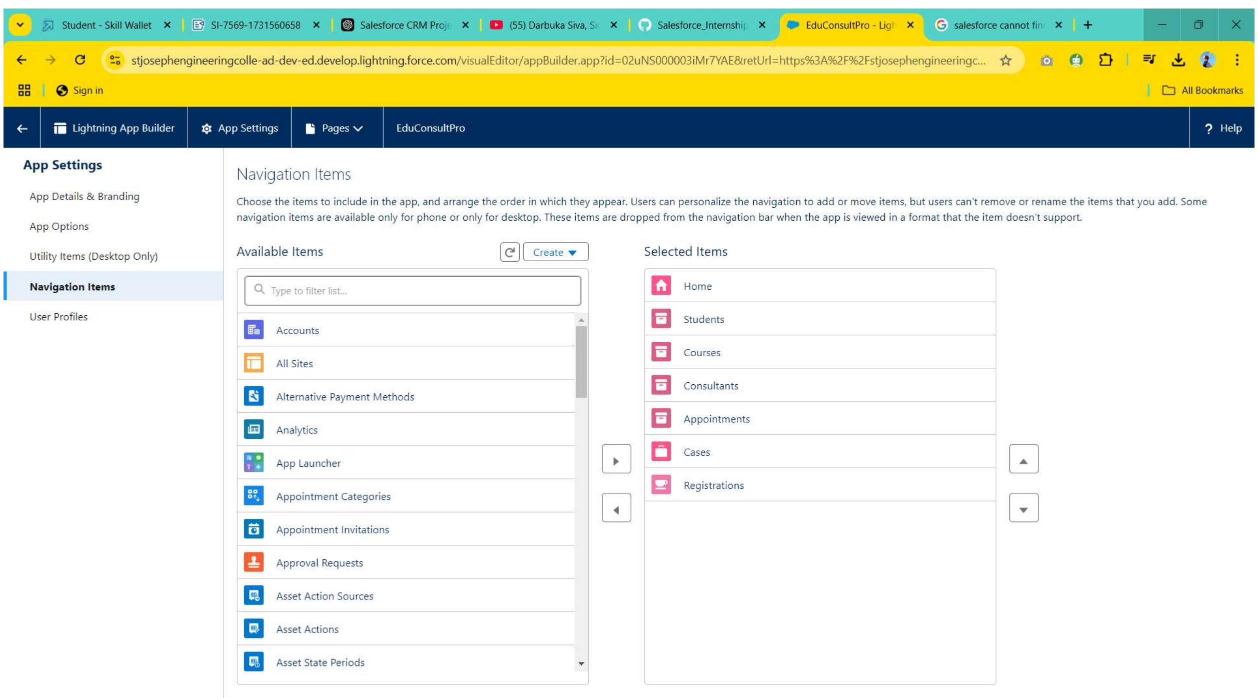
Case Type And Case Status Configuration





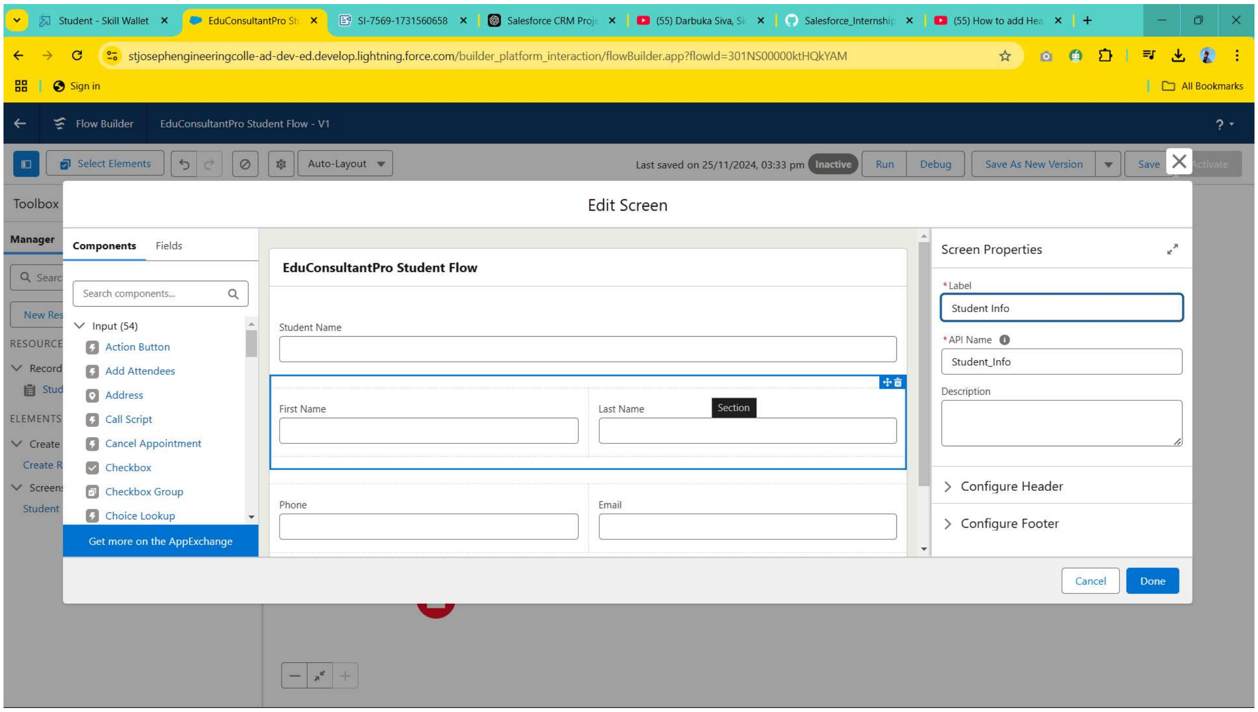
Create a Lightning App


Lightning App Builder
App Settings
Pages
EduConsultPro
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
* App Name
EduConsultPro
* Developer Name
EduConsultPro
Description
Enter a description...
Image
Clear
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
EduConsultPro

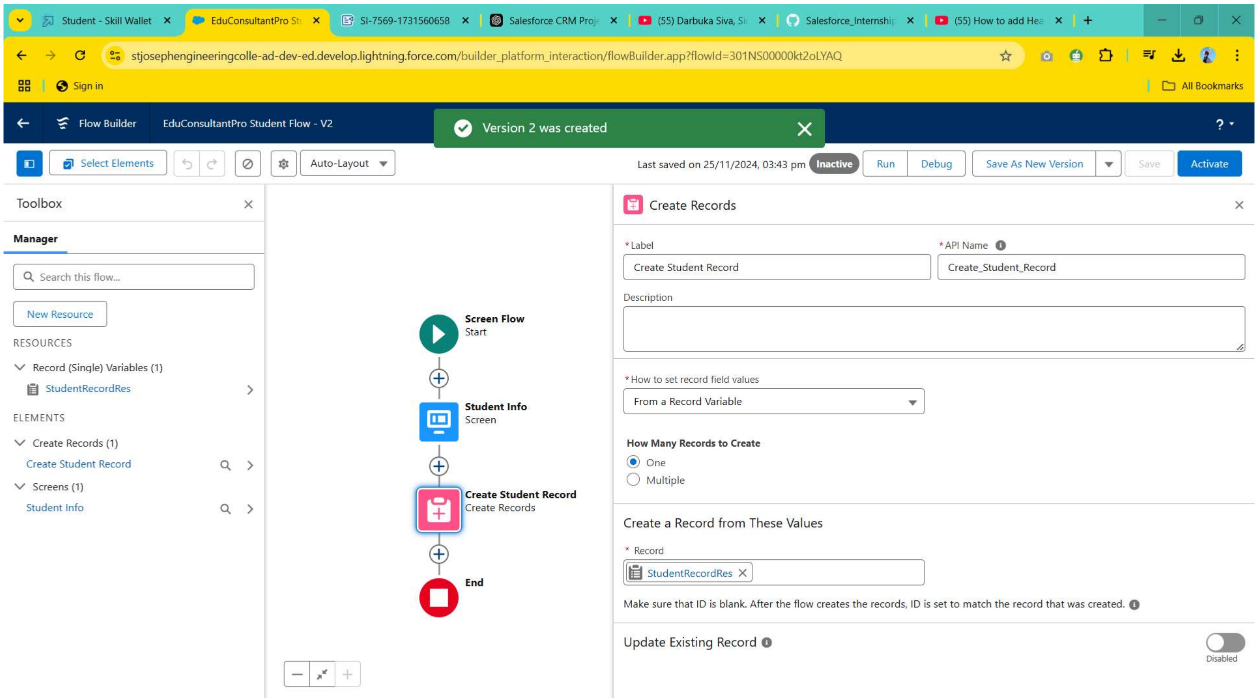

Lightning App Builder
App Settings
Pages
EduConsultPro
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Type to filter list...
Accounts
All Sites
Alternative Payment Methods
Analytics
App Launcher
Appointment Categories
Appointment Invitations
Approval Requests
Asset Action Sources
Asset Actions
Asset State Periods
Selected Items
Home
Students
Courses
Consultants
Appointments
Cases
Registrations

Create a ScreenFlow for Student Admission Application process.

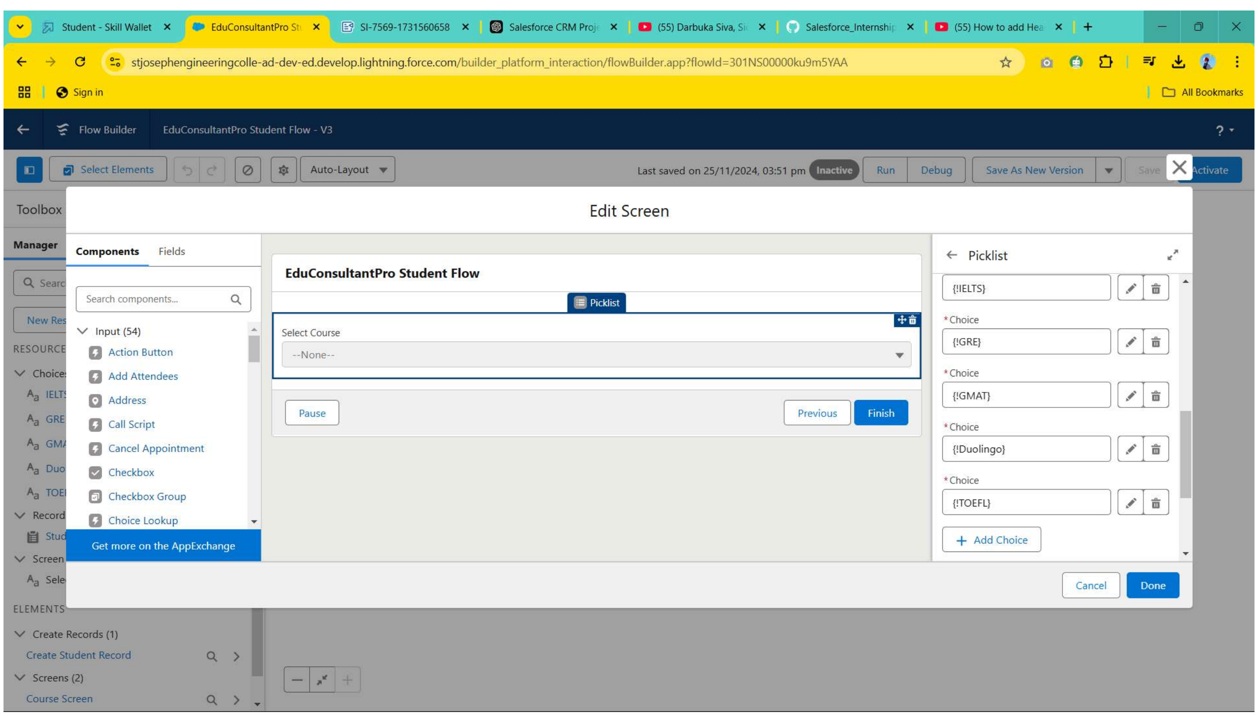
Add Screen Element



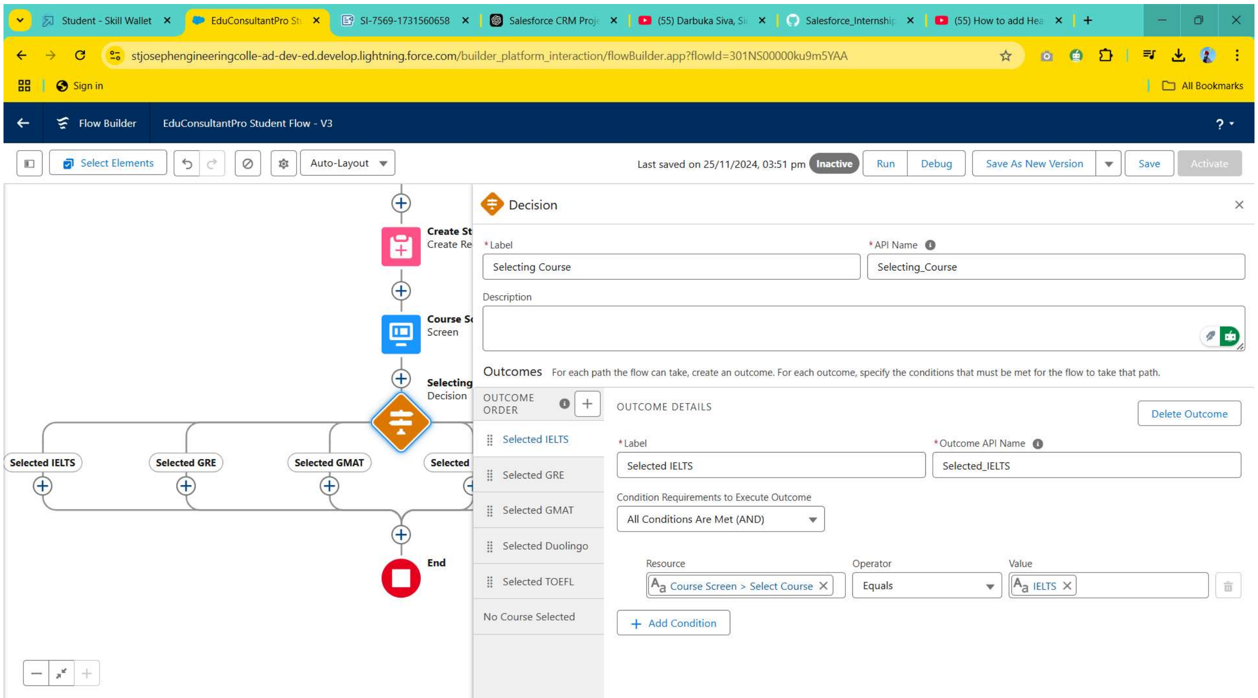
Create Student Record using Create Element



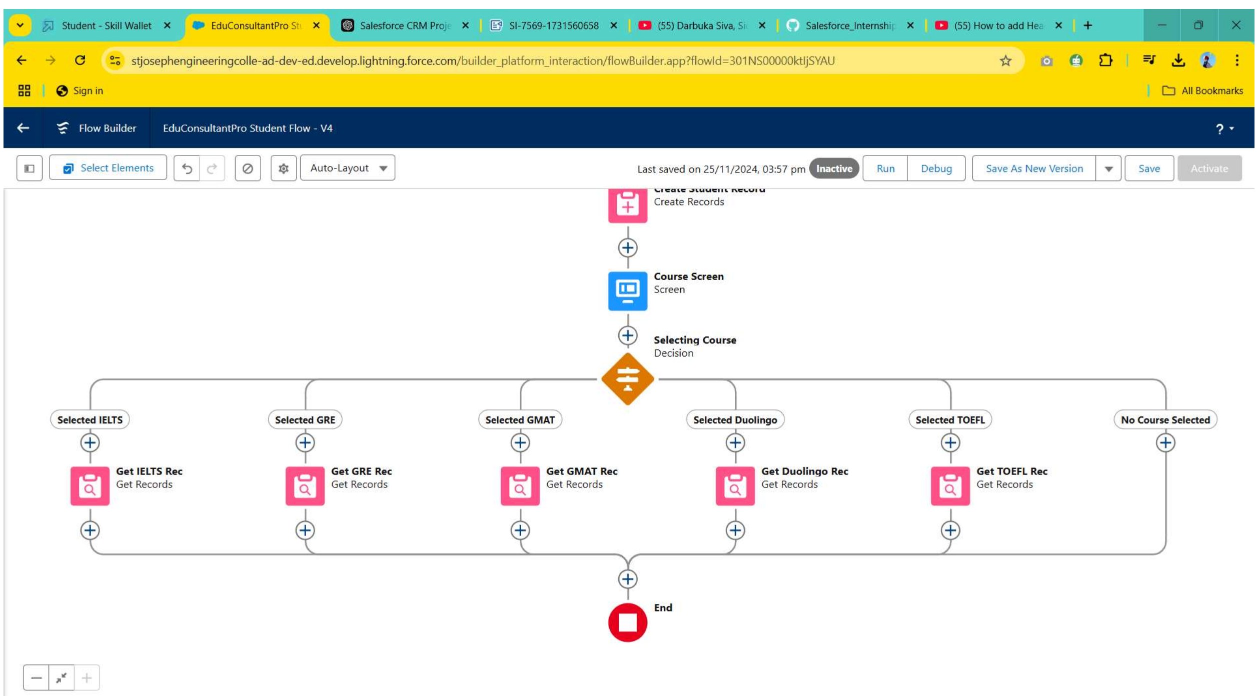
Add Screen Element:



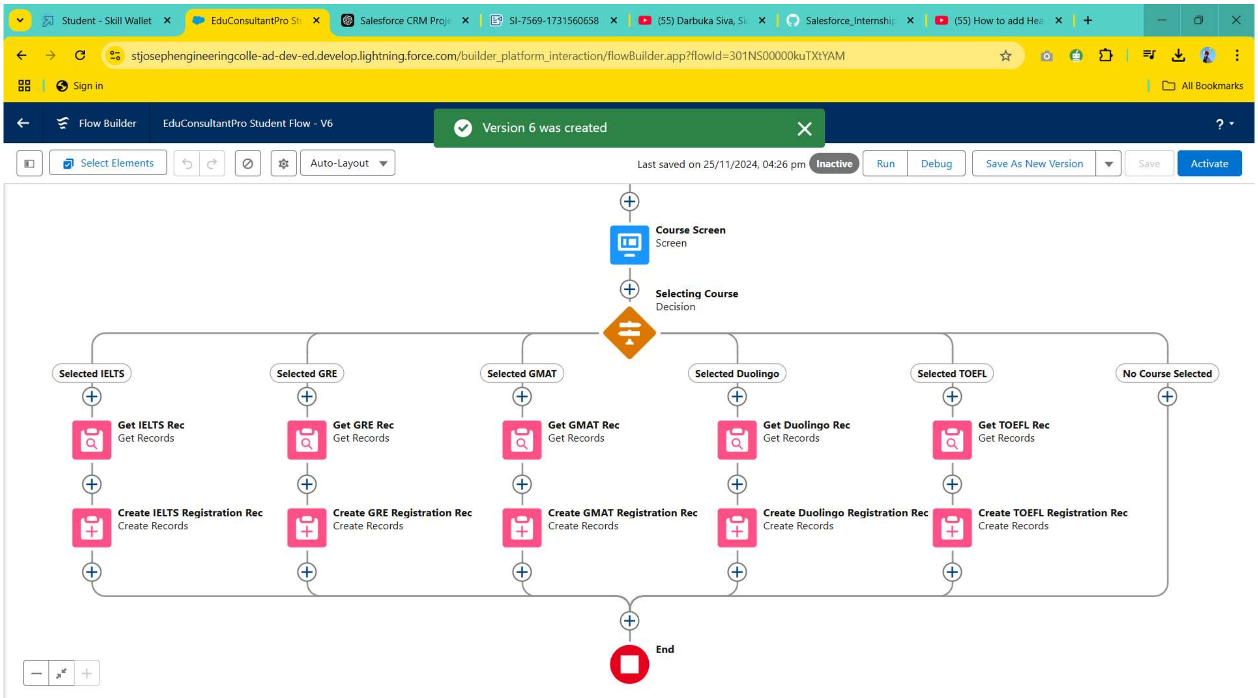
Add Decision Element



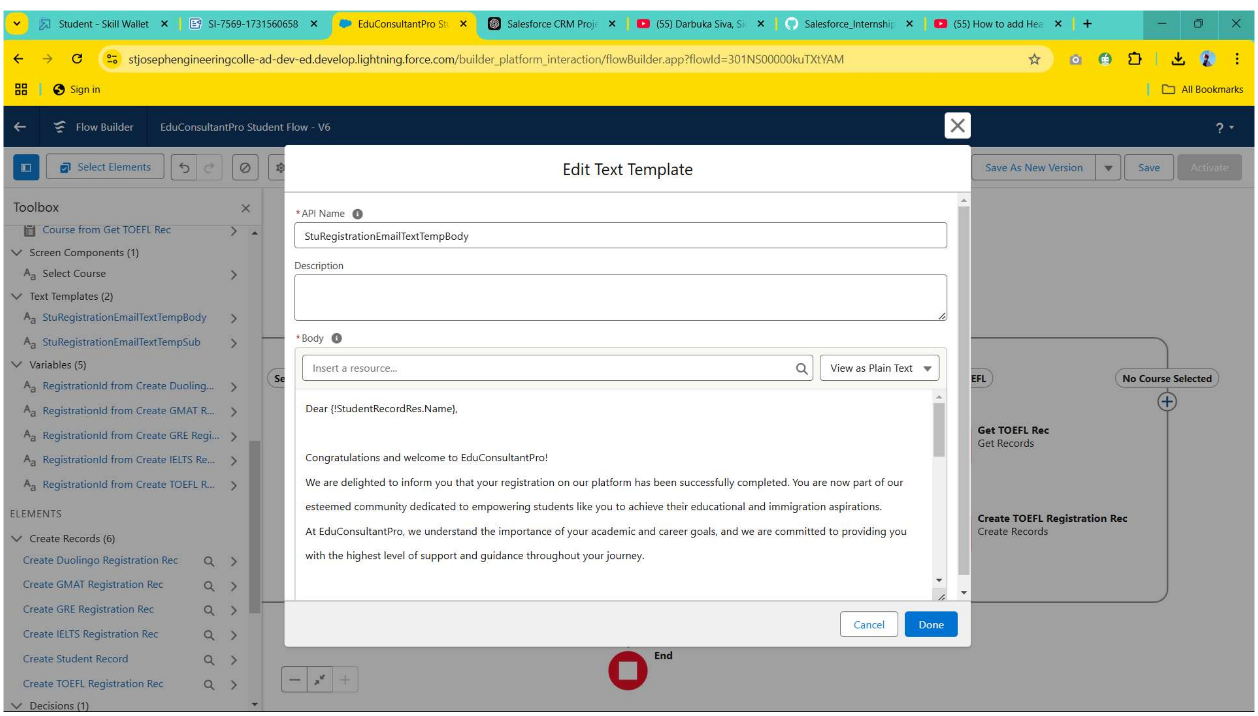
Add Get Record Element

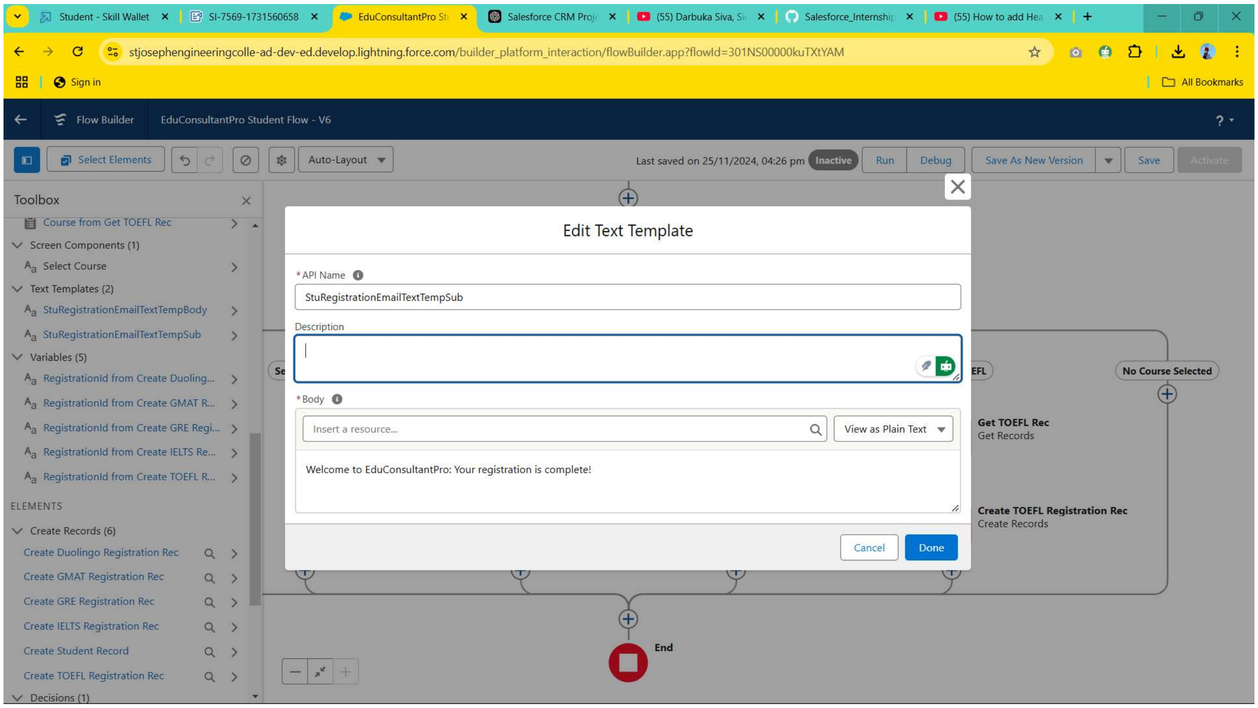


Create Regitration record using record element

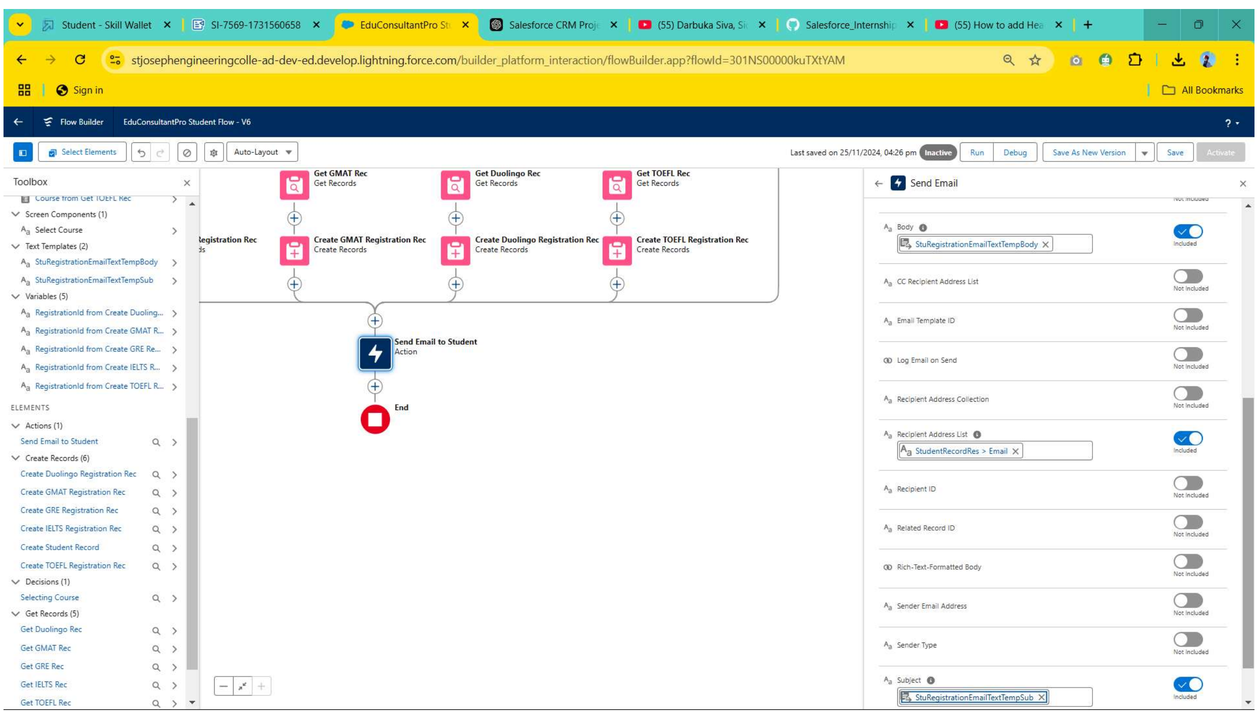


Create Email Text Template Variables for email body and subject

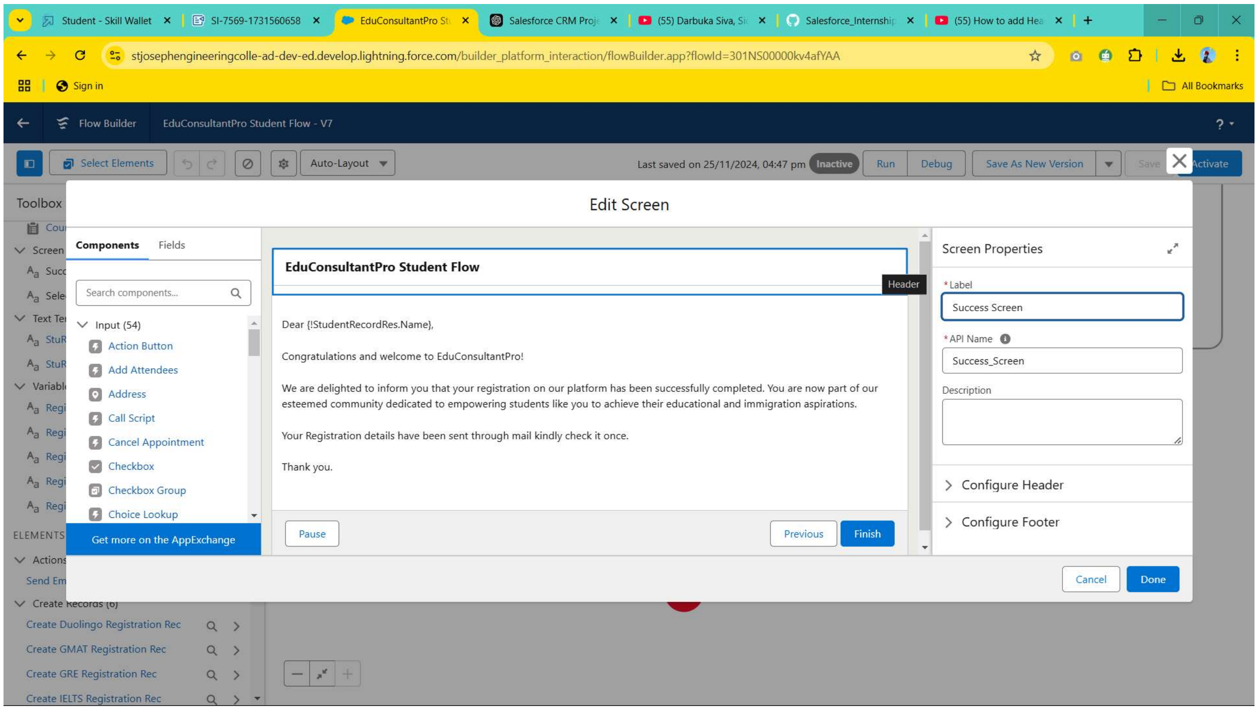




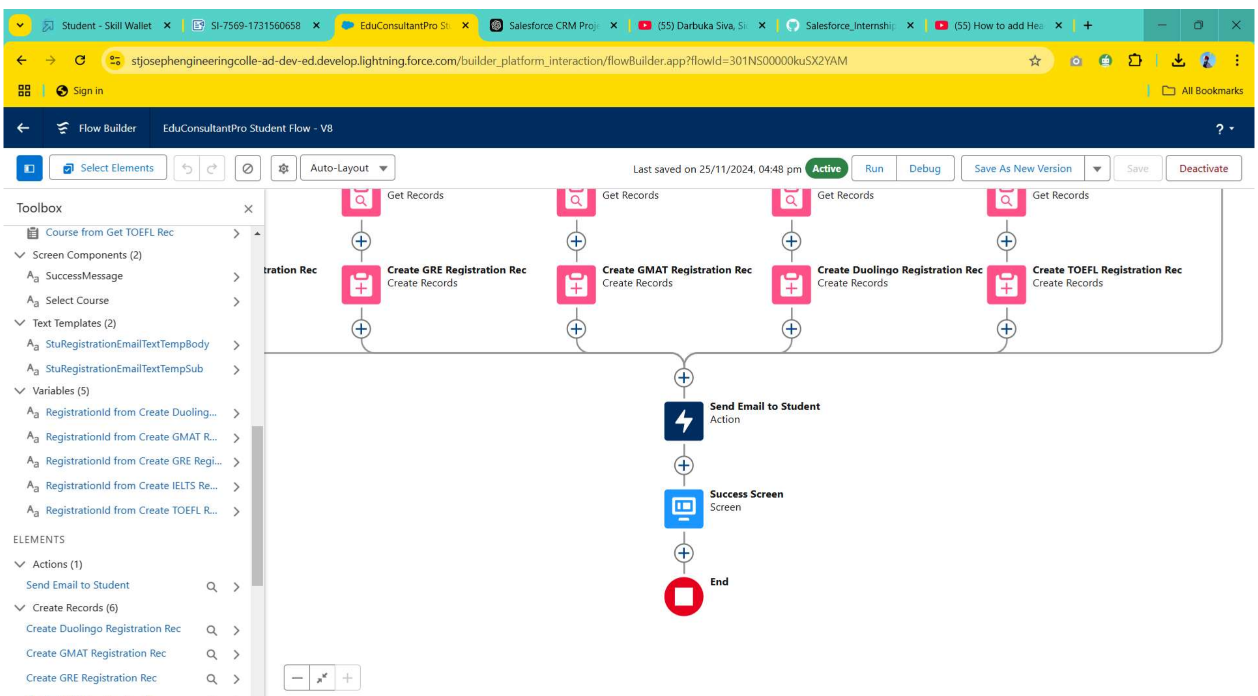
Add an Action Element



Add Sucess screen element

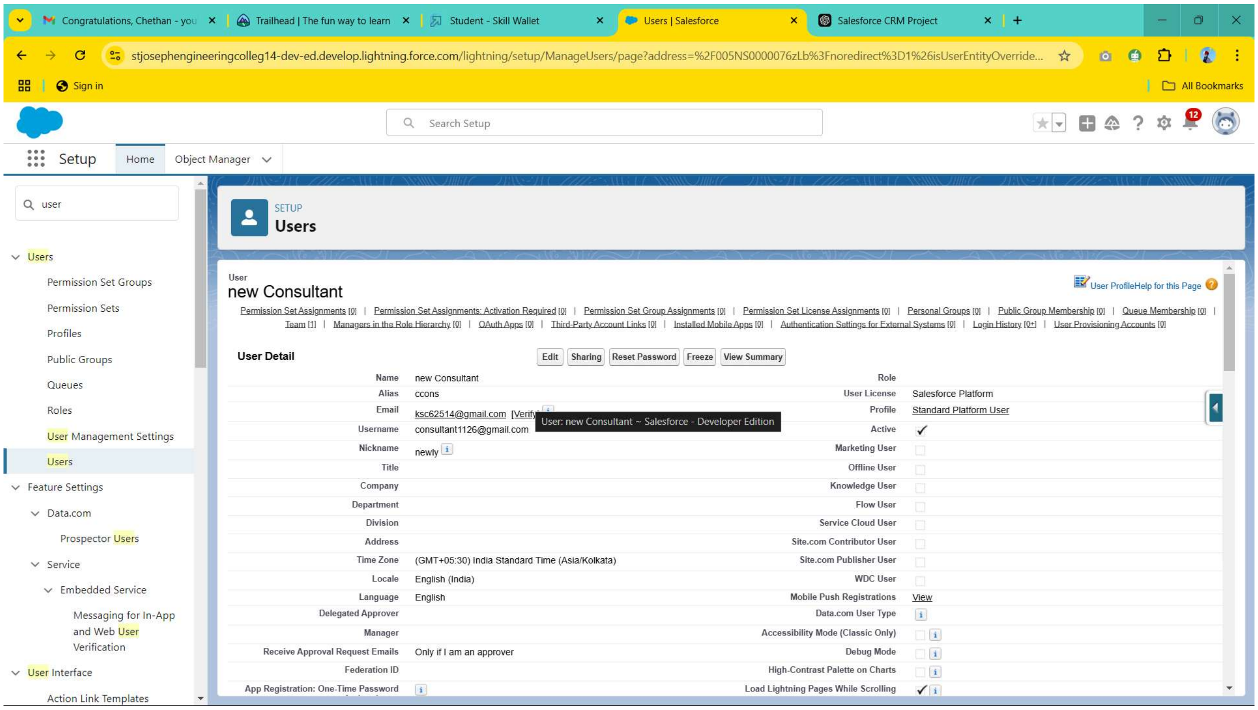


Activated the flow

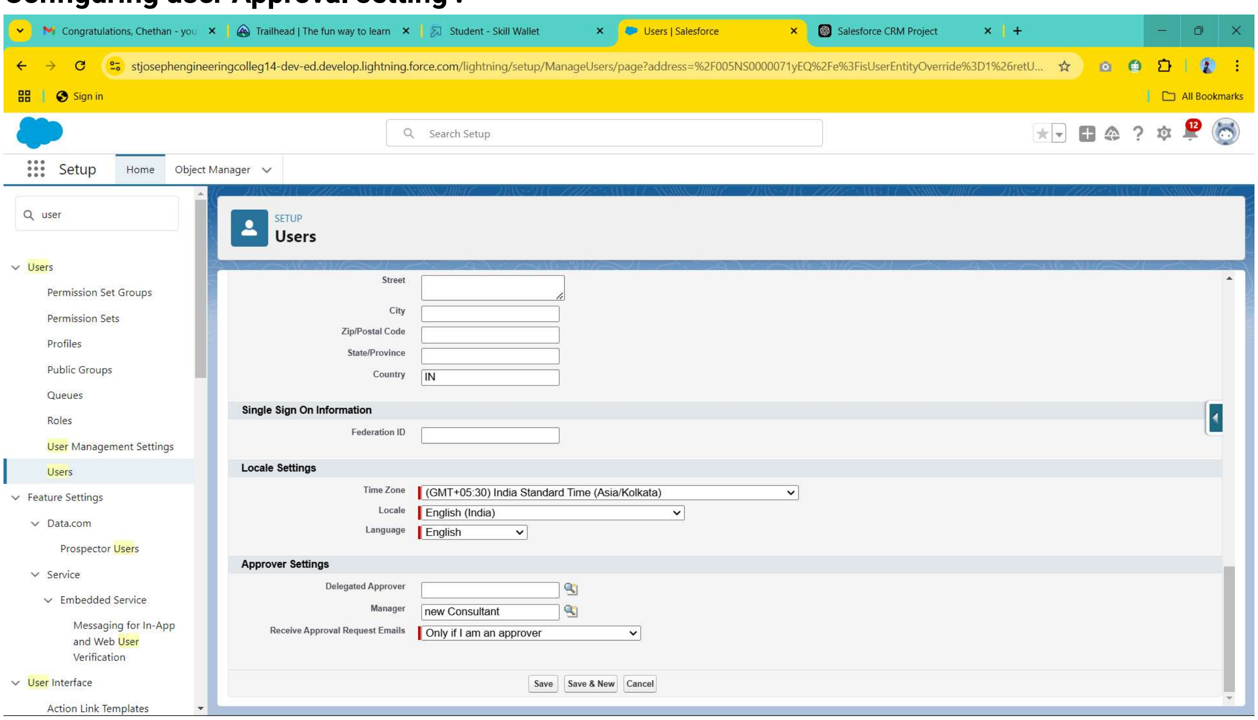


Create Users

User named Consultant:

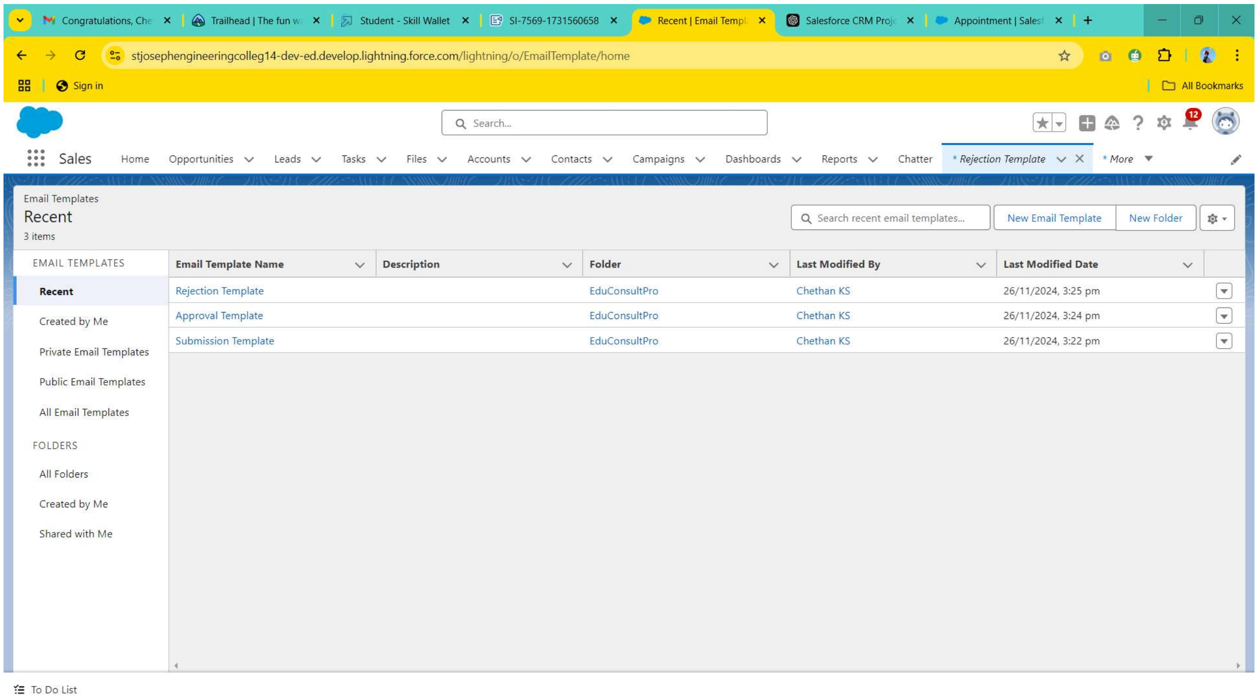


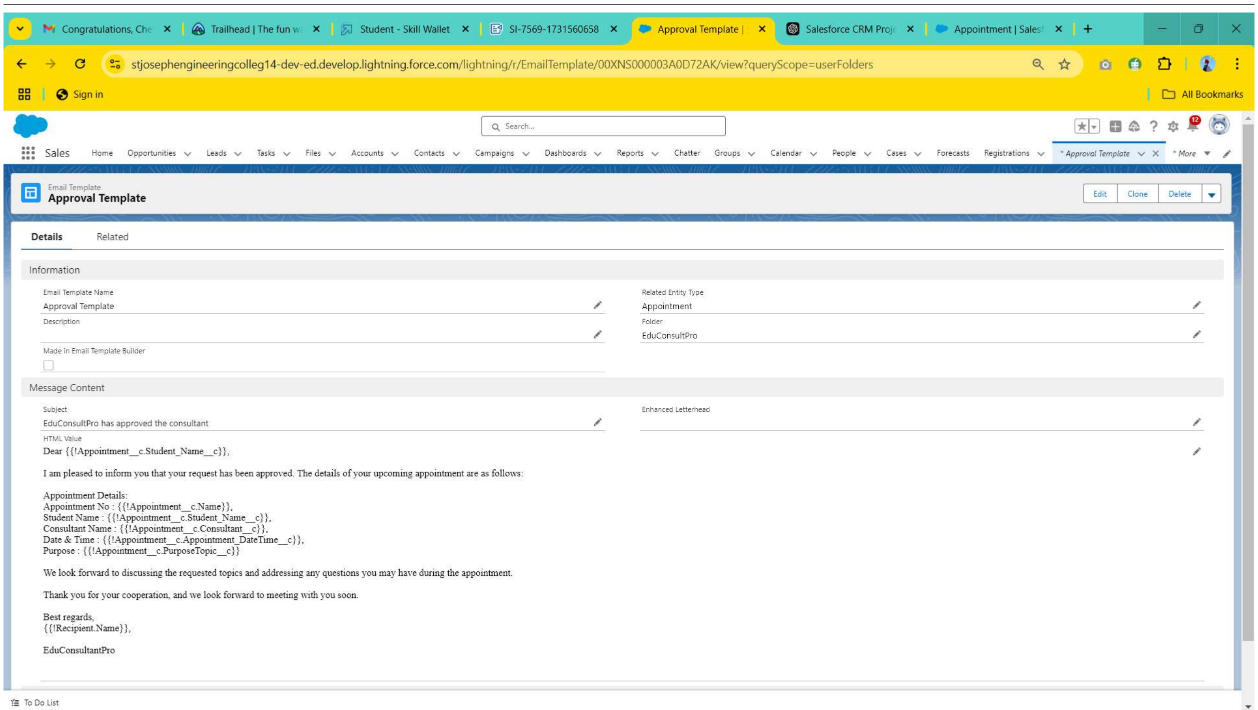
Configuring user Approval setting :

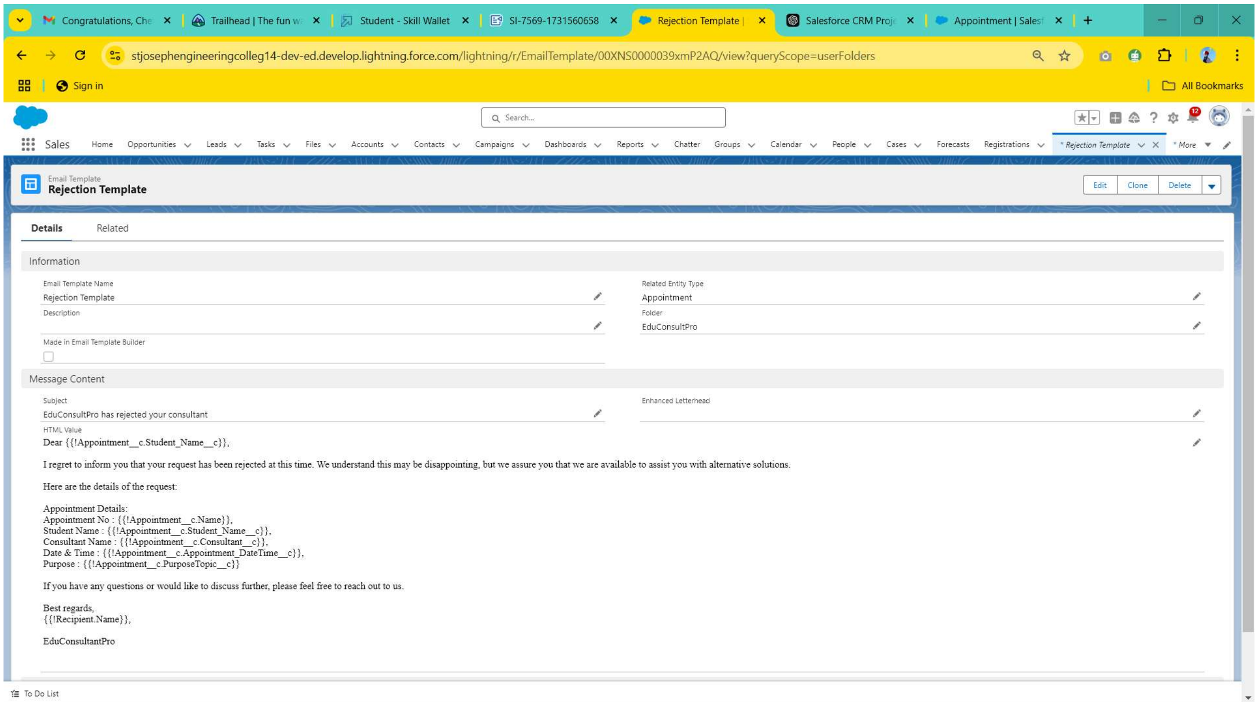


Create an Approval Process for Property Object

Create an Email Template:



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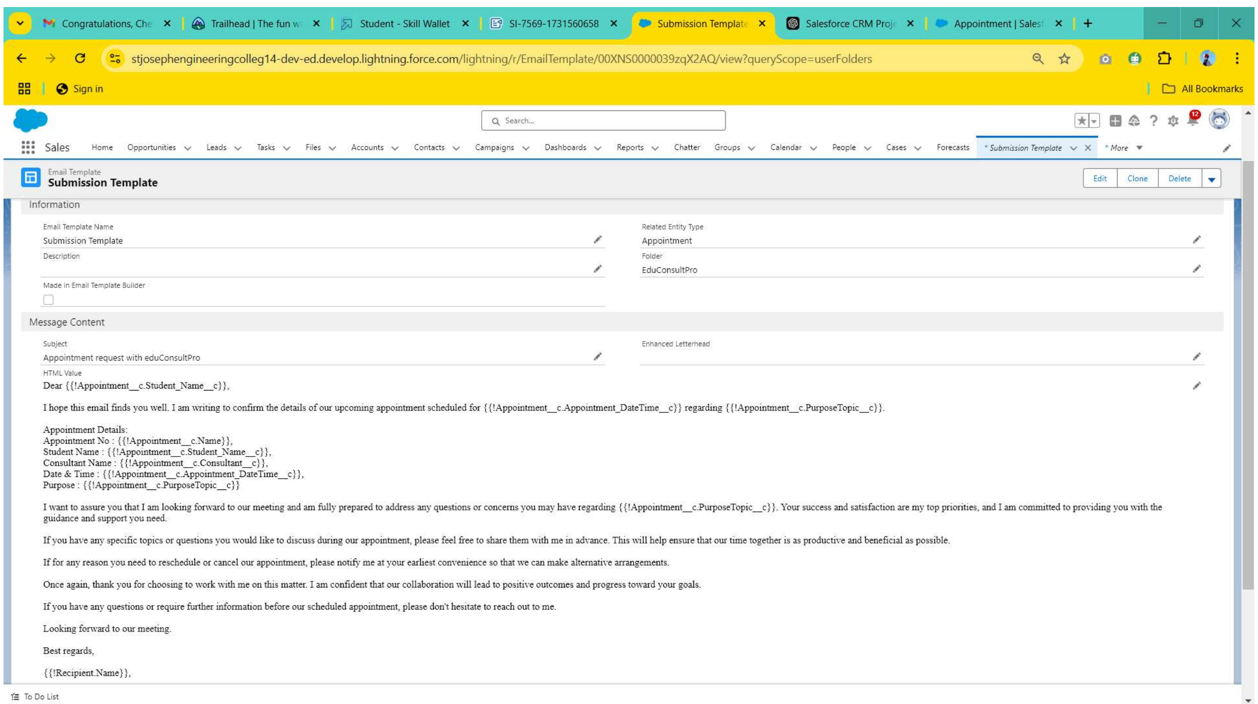
Email Template
Rejection Template
Details
Related
Information
Email Template Name
Rejection Template
Related Entity Type
Appointment
Description
Folder
EduConsultPro
Made in Email Template Builder
Message Content
Subject
EduConsultPro has rejected your consultant
Enhanced Letterhead
HTML Value
Dear {{!Appointment__c.Student_Name__c}},
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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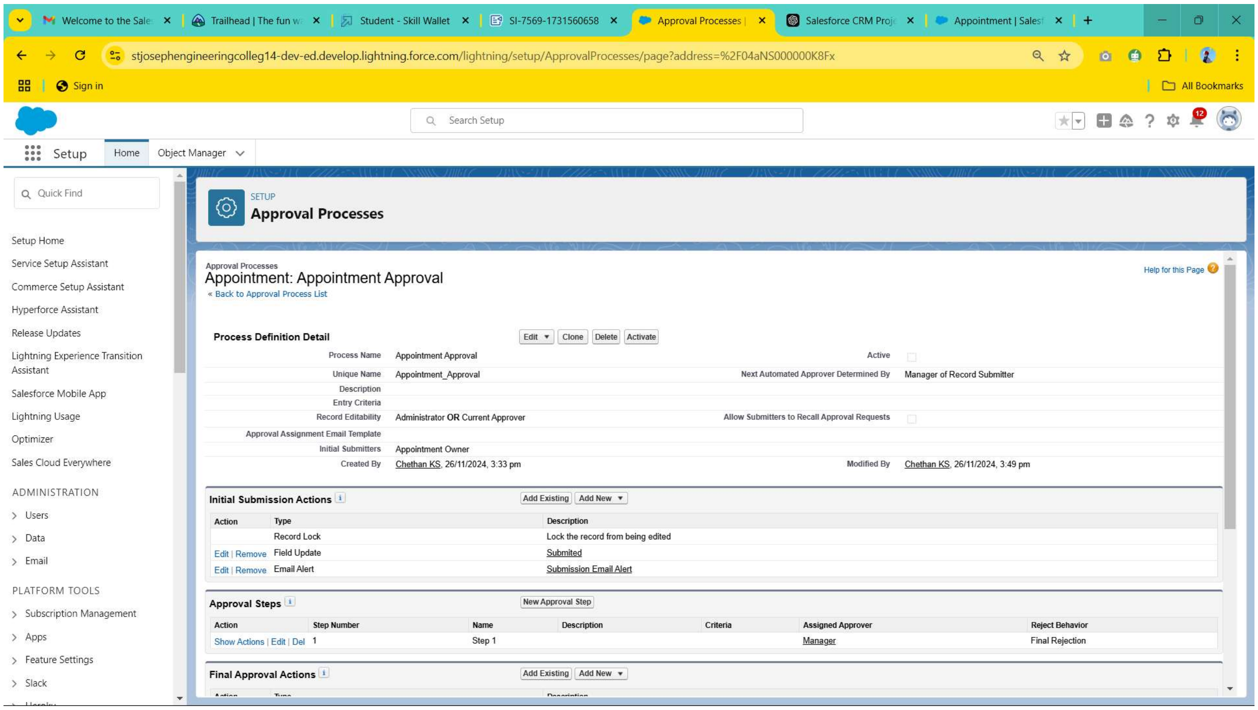
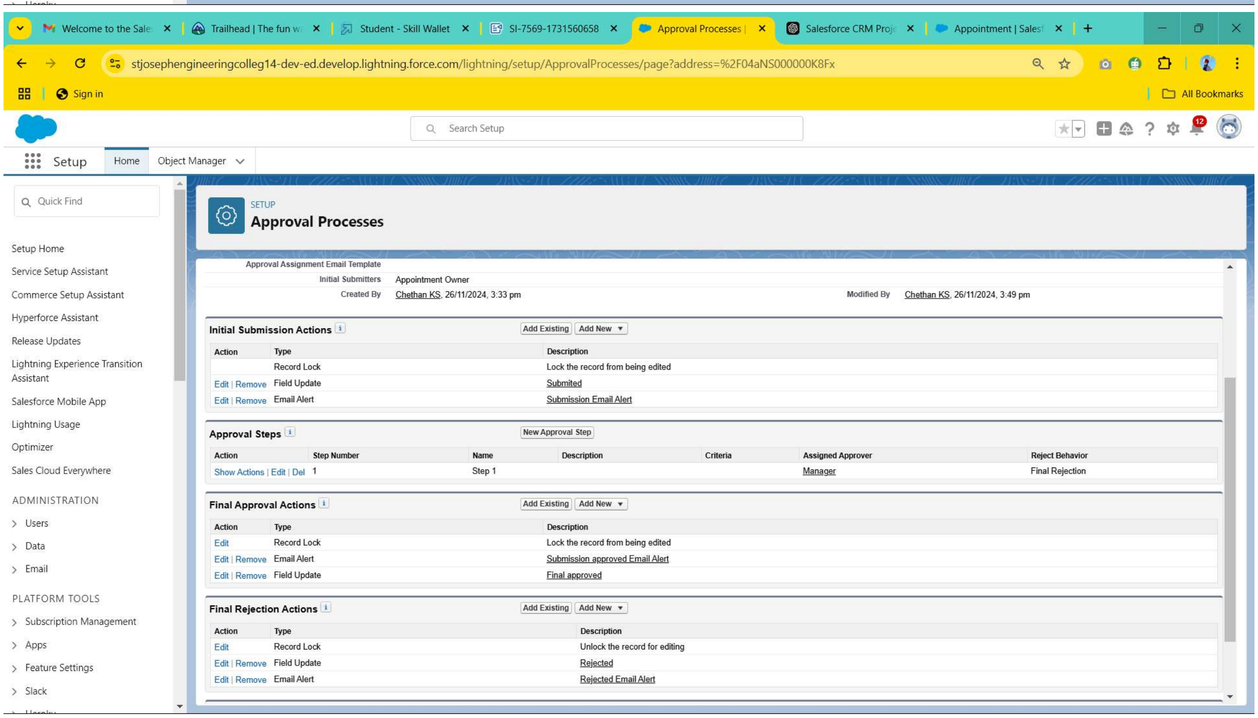
Email Template
Submission Template
Information
Email Template Name
Submission Template
Related Entity Type
Appointment
Description
Folder
EduConsultPro
Made in Email Template Builder
Message Content
Subject
Appointment request with eduConsultPro
Enhanced Letterhead
HTML Value
Dear {{!Appointment__c.Student_Name__c}},
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}},

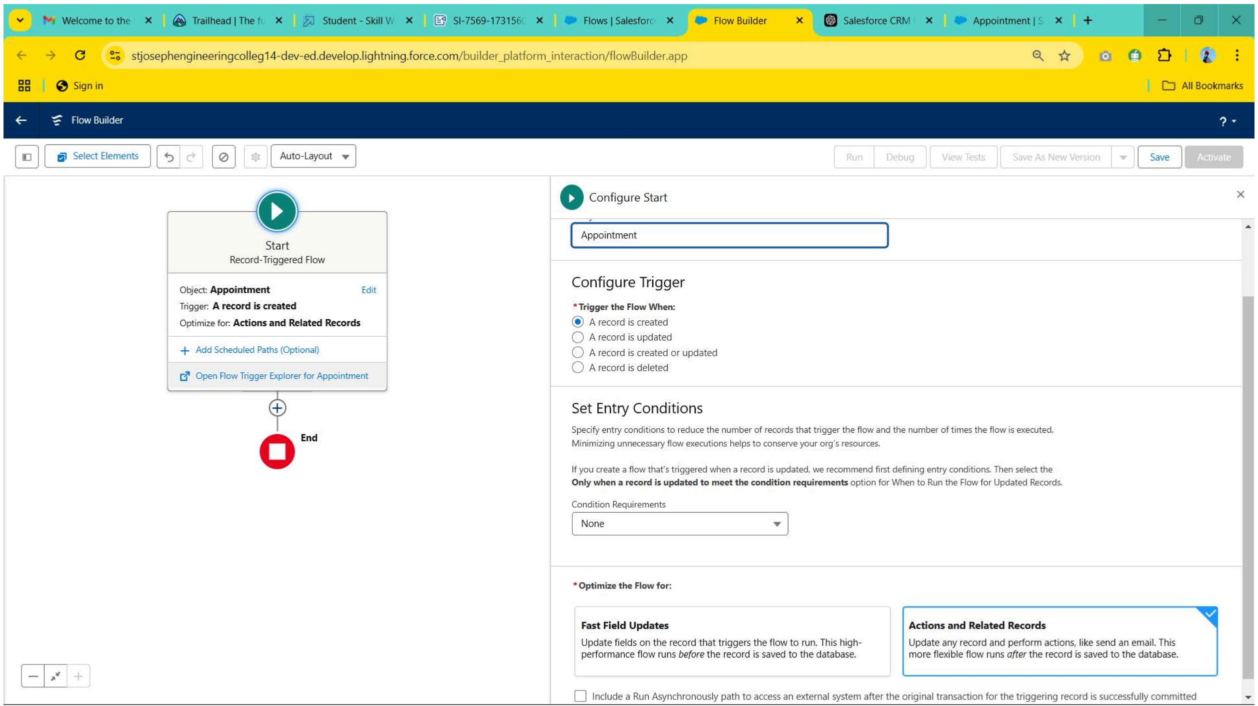
Create an approval process:



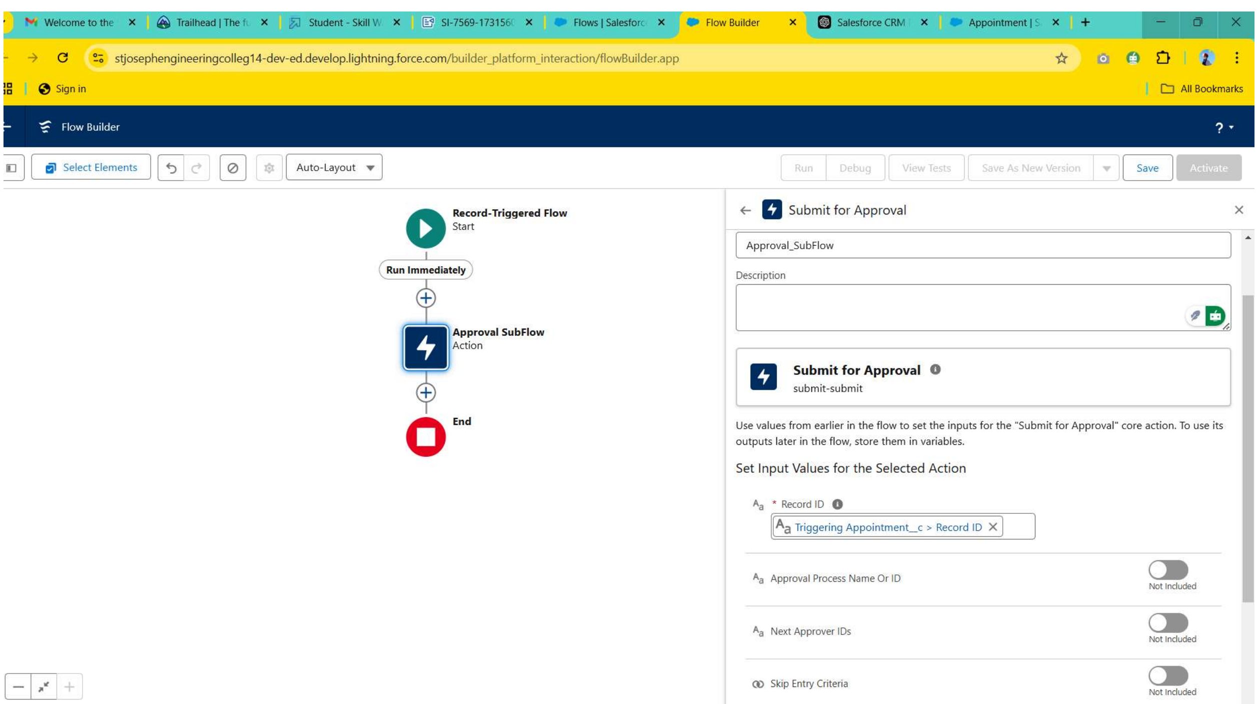


Create a Record Triggered Flow

Configure the Start Element

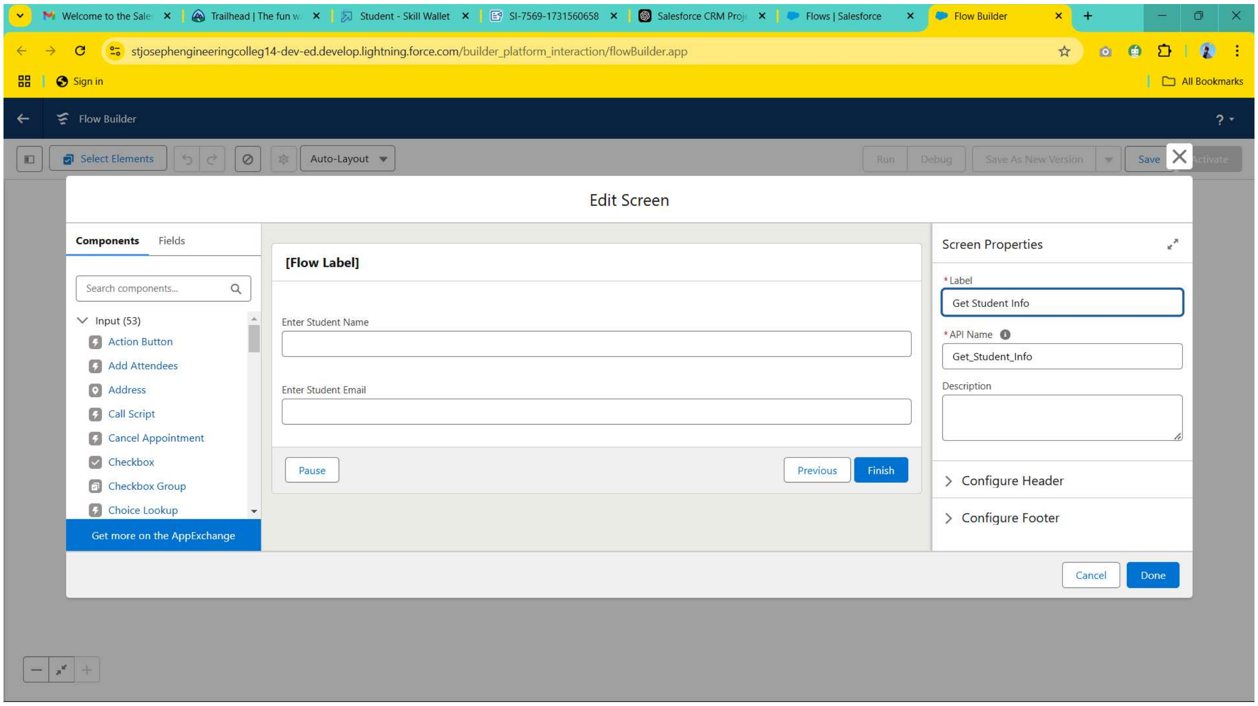


Add an Action Element

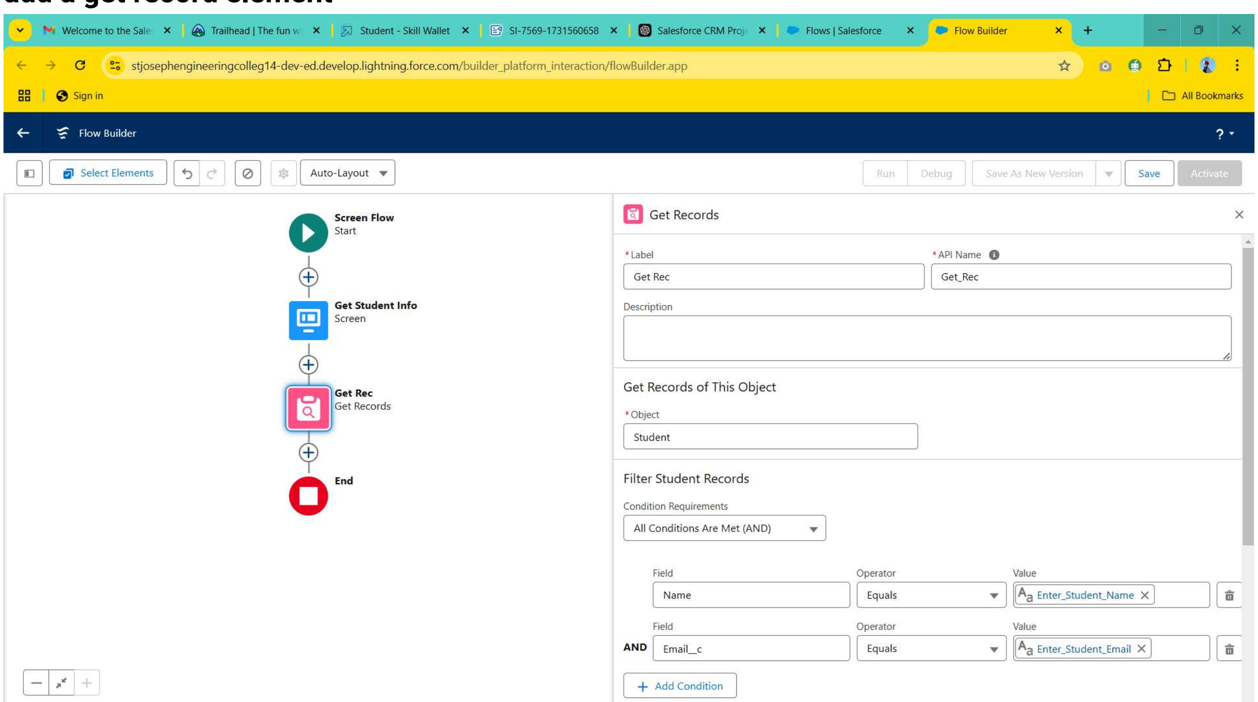


Create a ScreenFlow for Existing Student to Book an Appointment

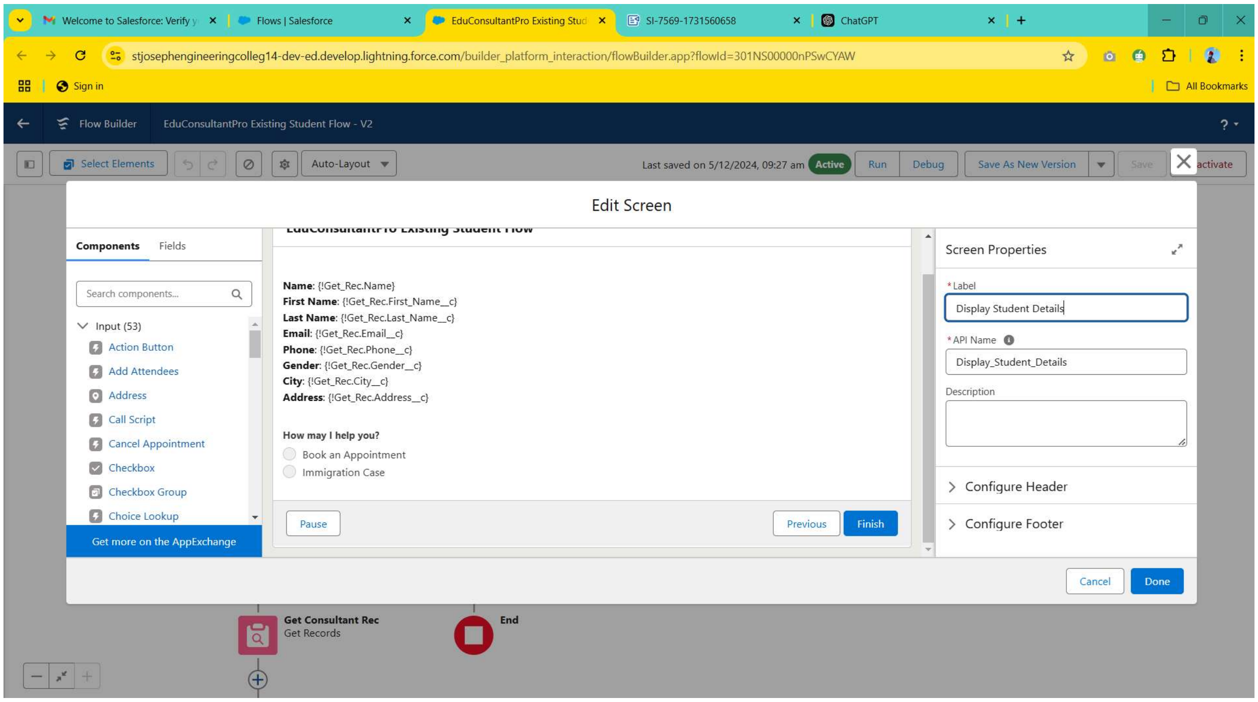
Add screen element



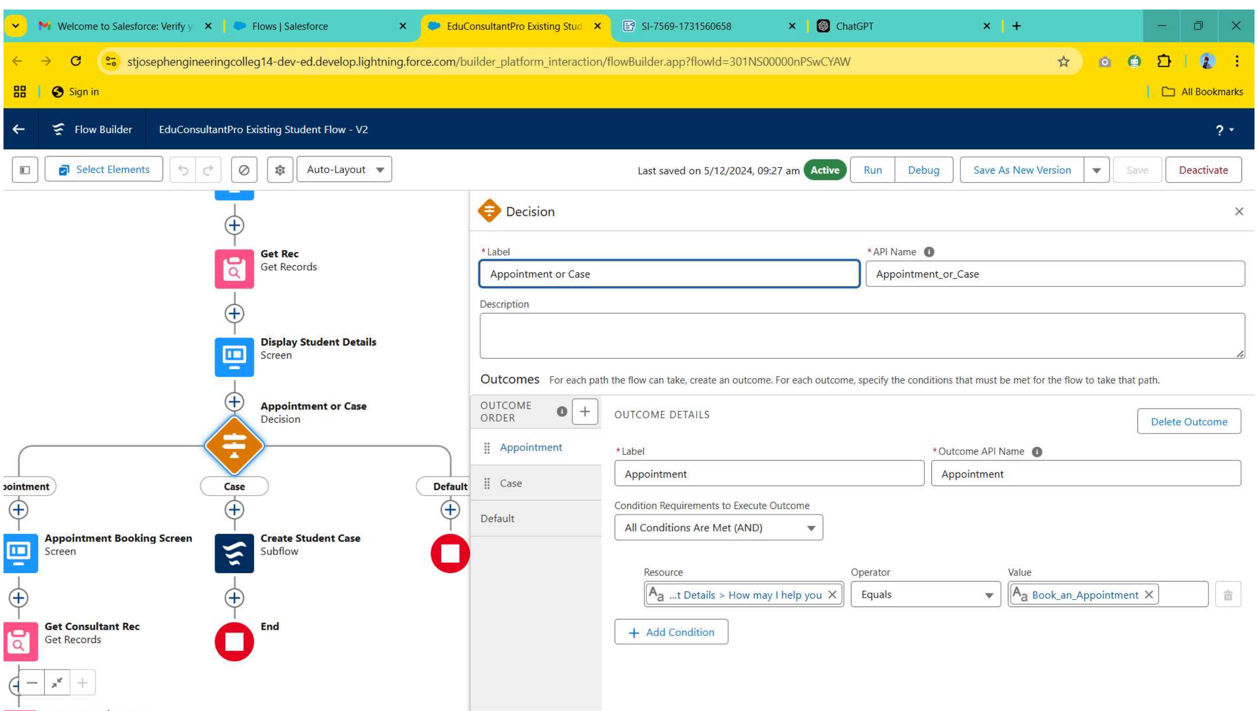
add a get record element

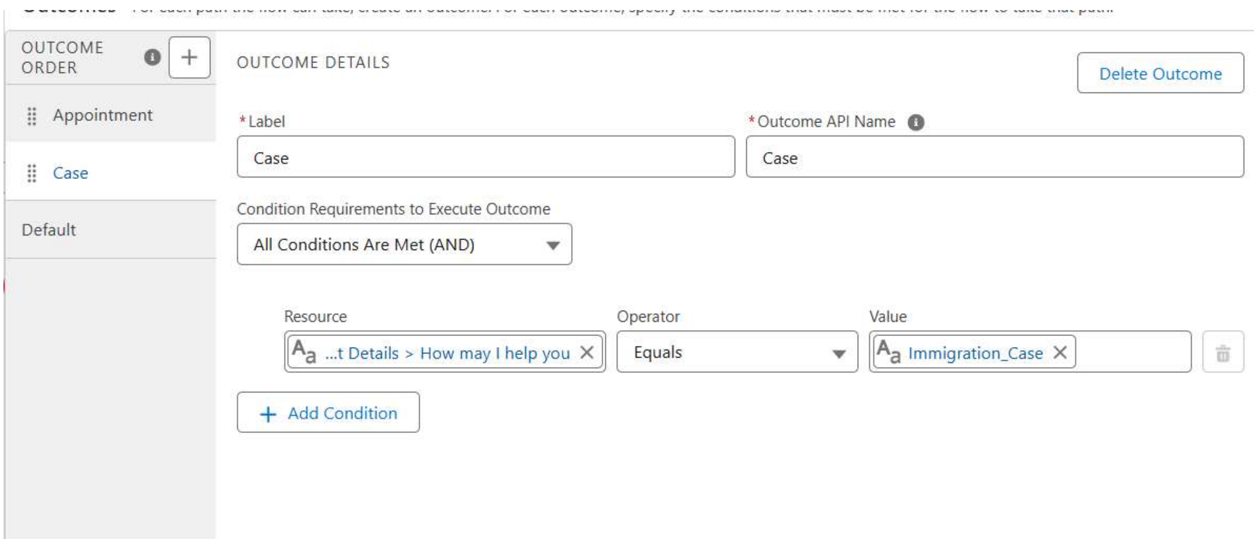


Display Student details

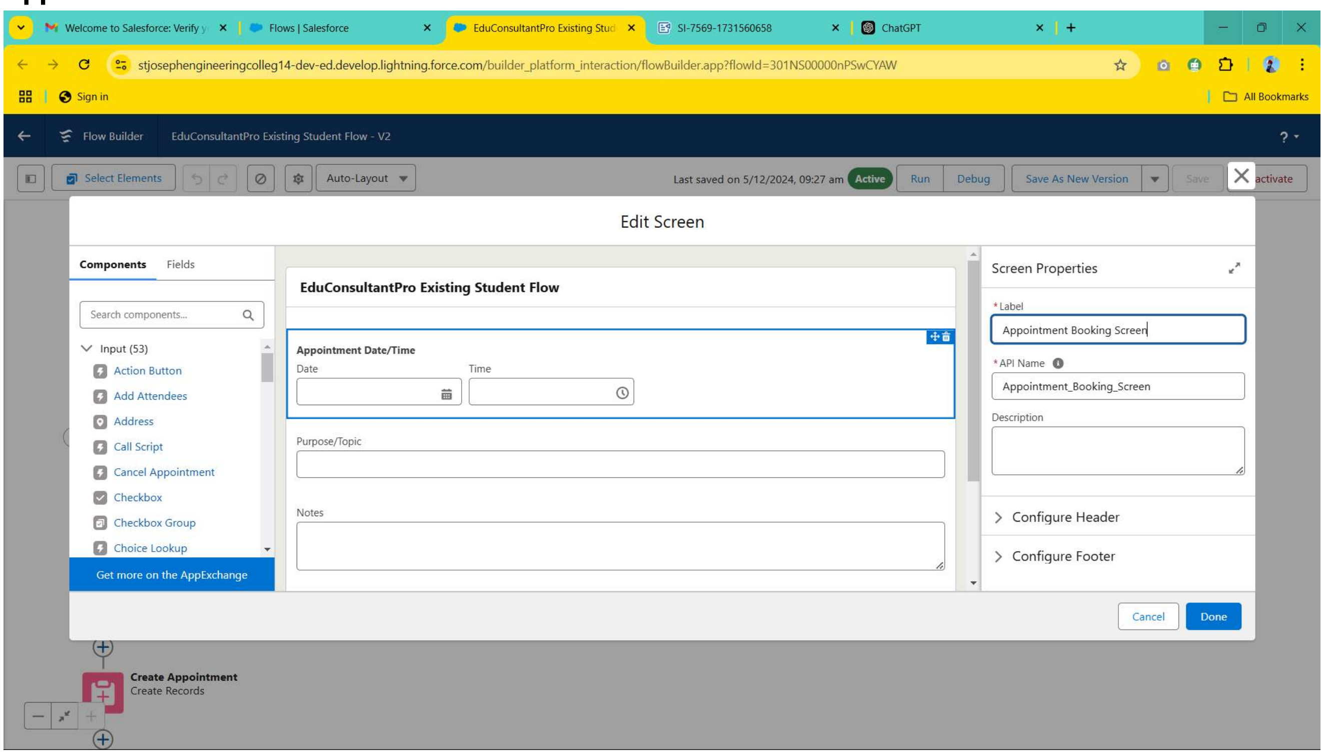


Add decision element

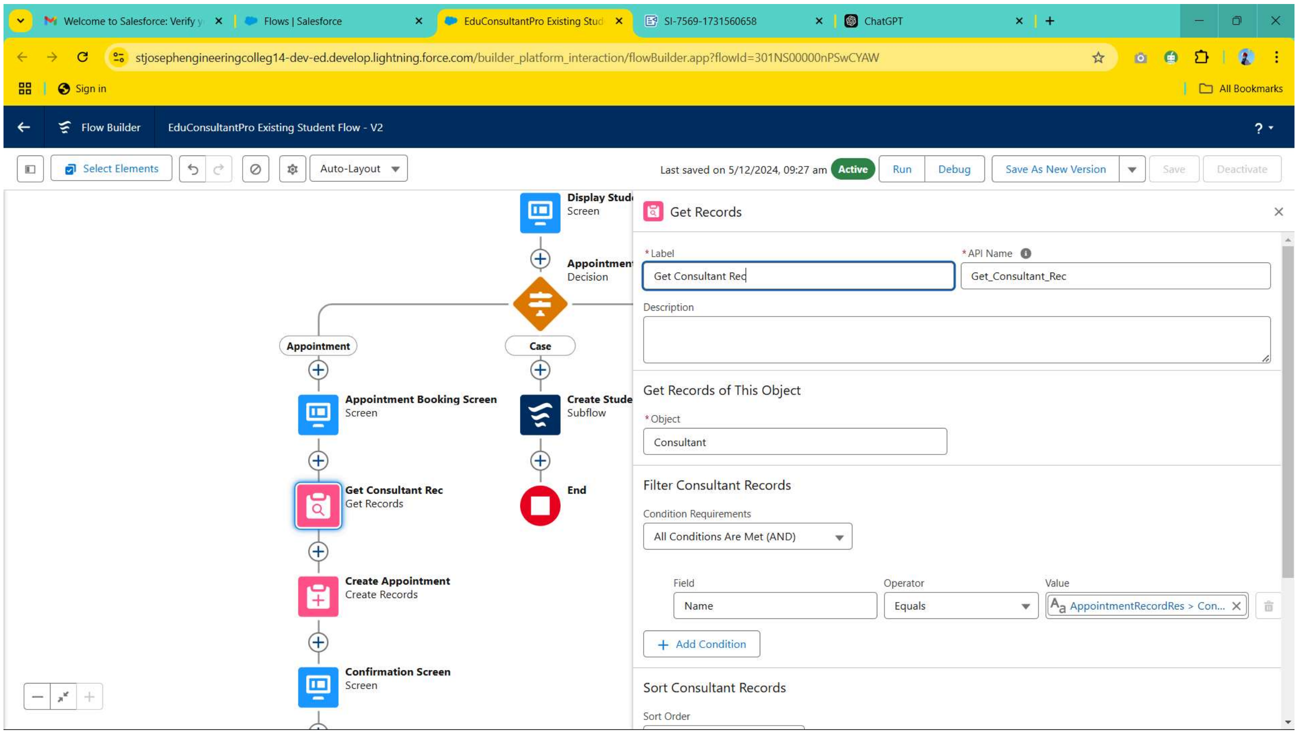




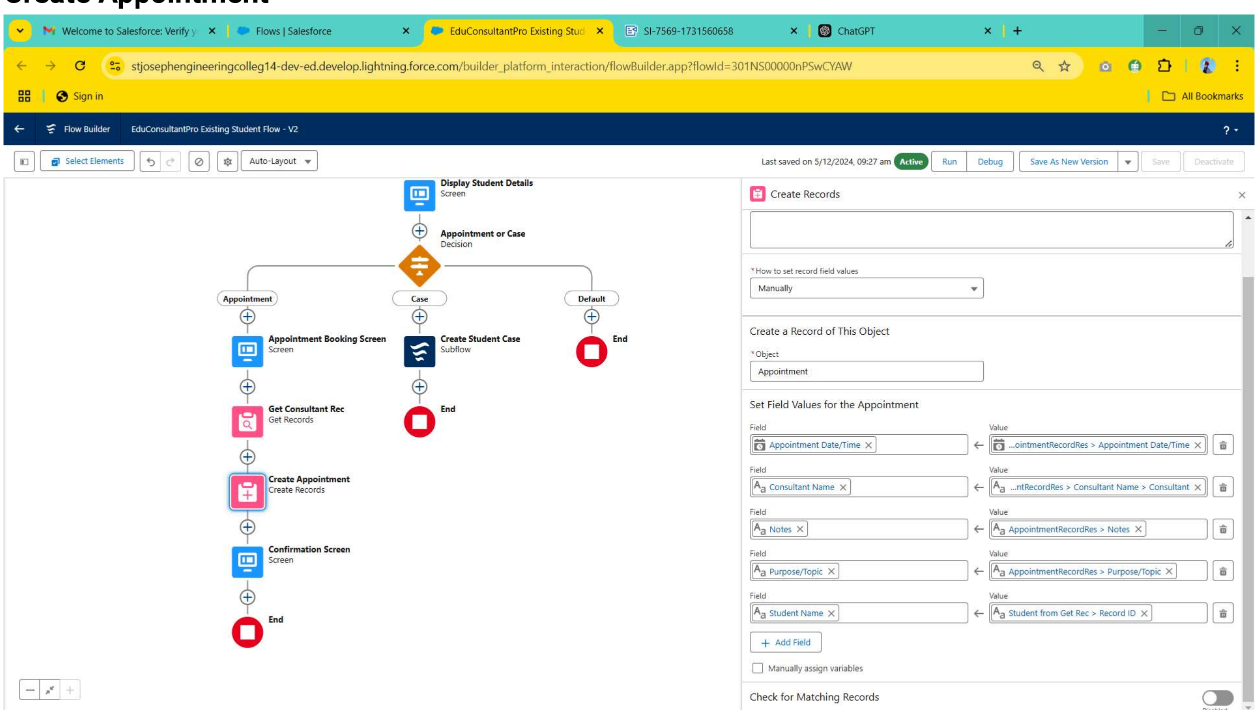
Appointment Book Screen



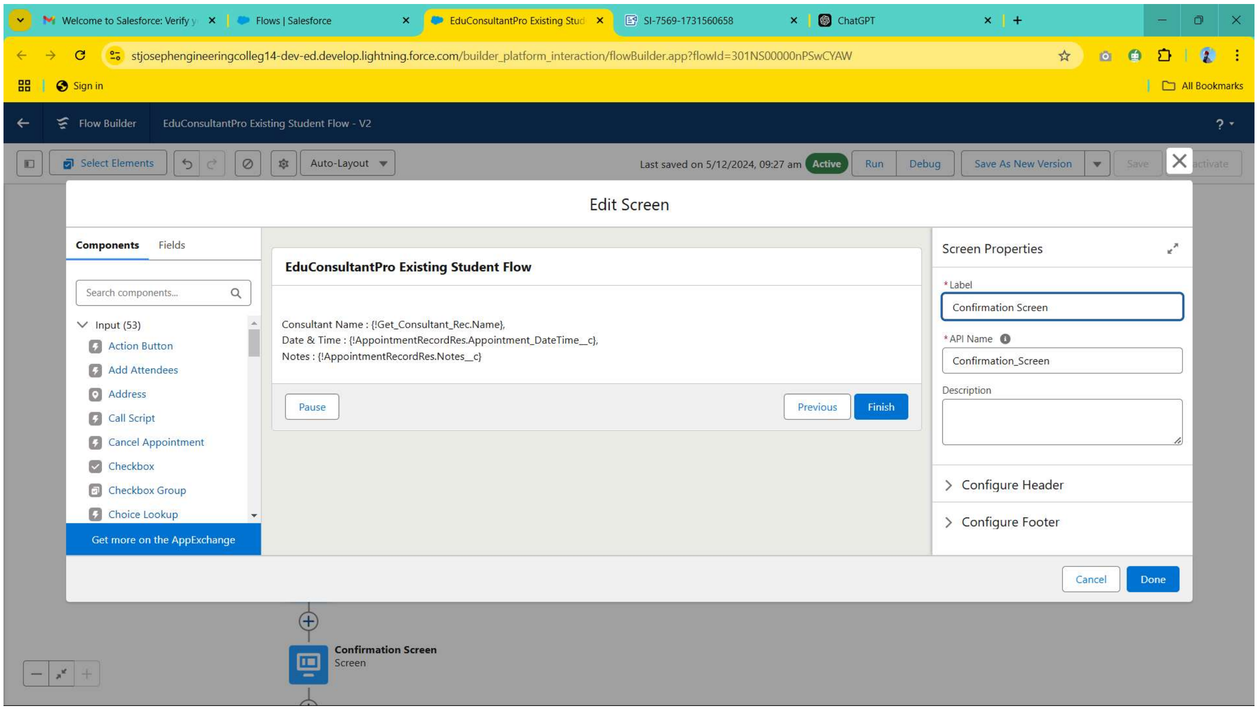
Get Records



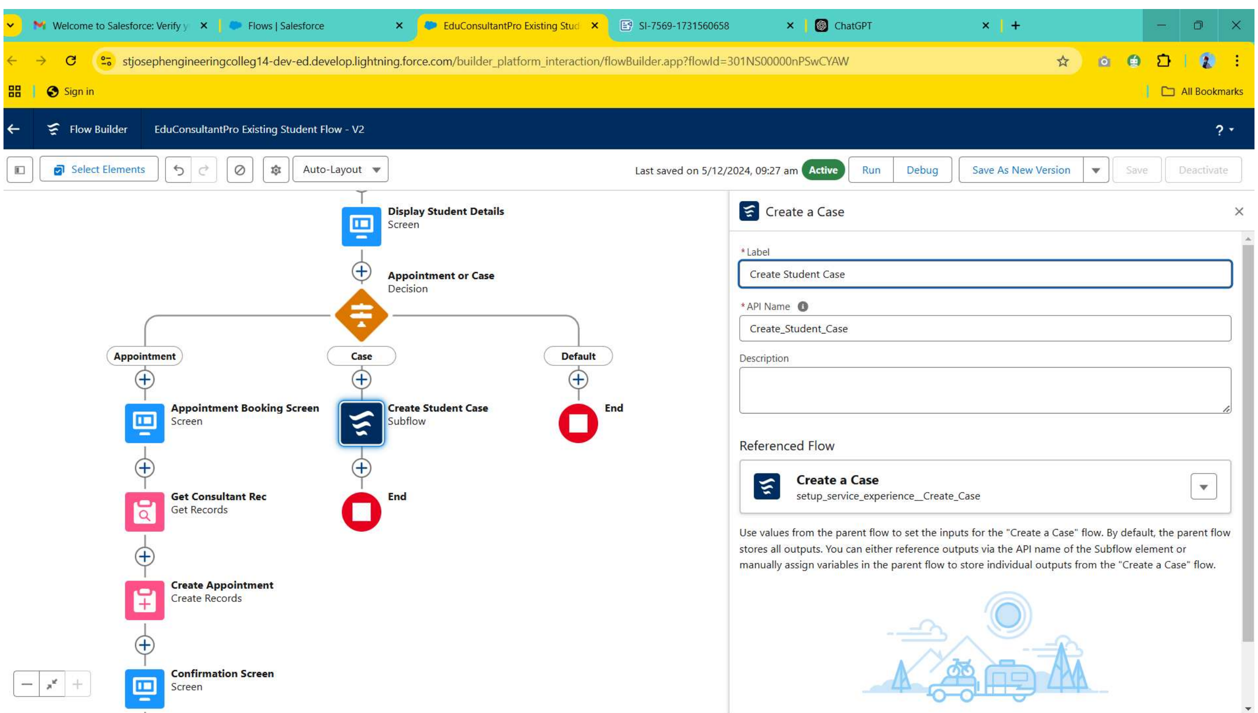
Create Appointment



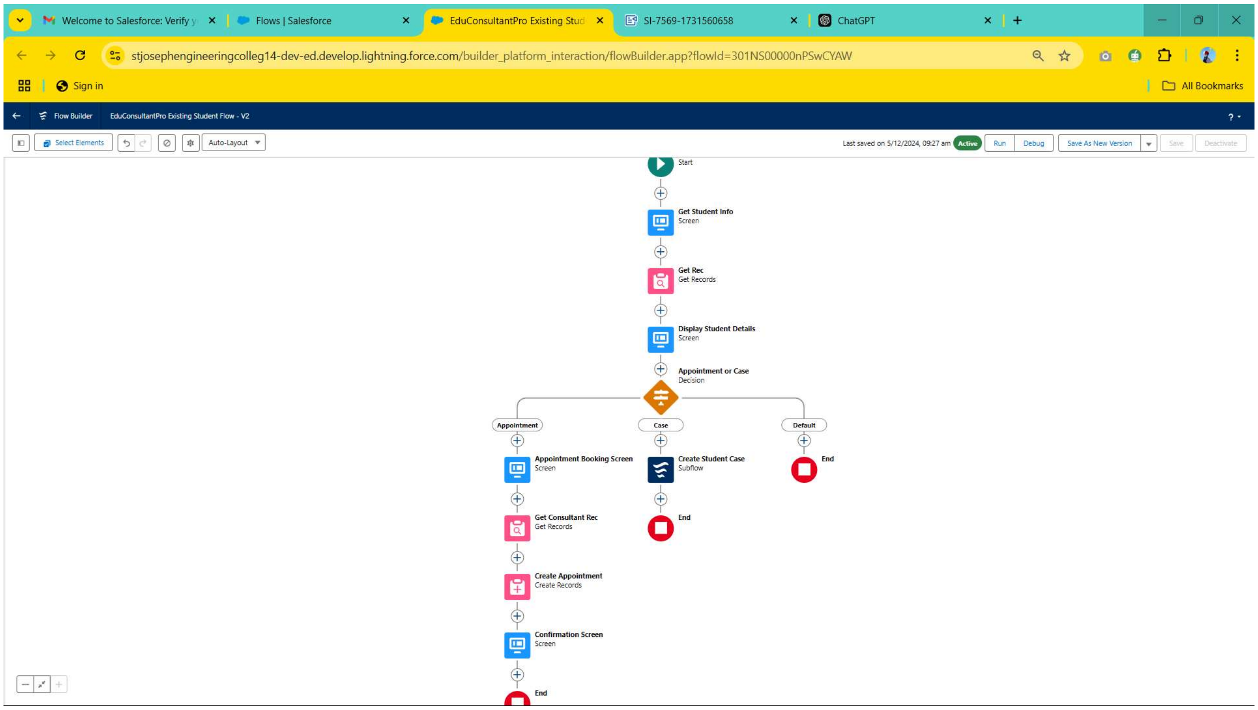
Confirmation Screen



Create a subflow

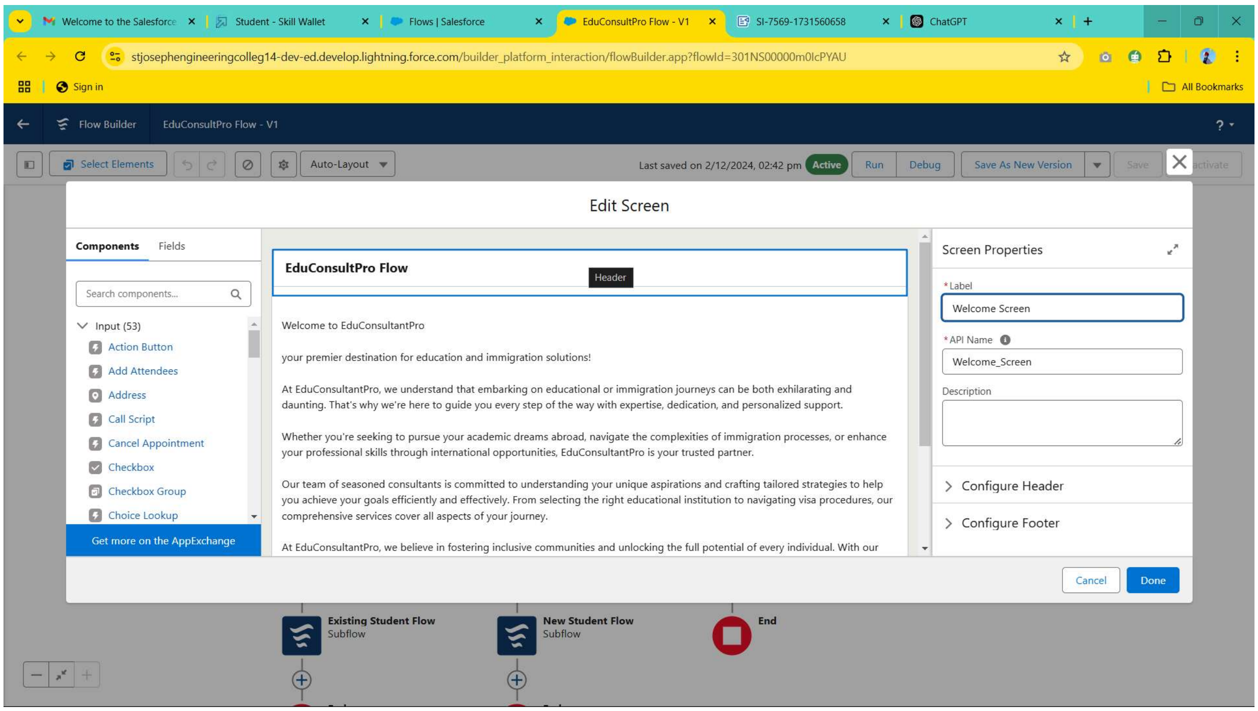


Entire Flow

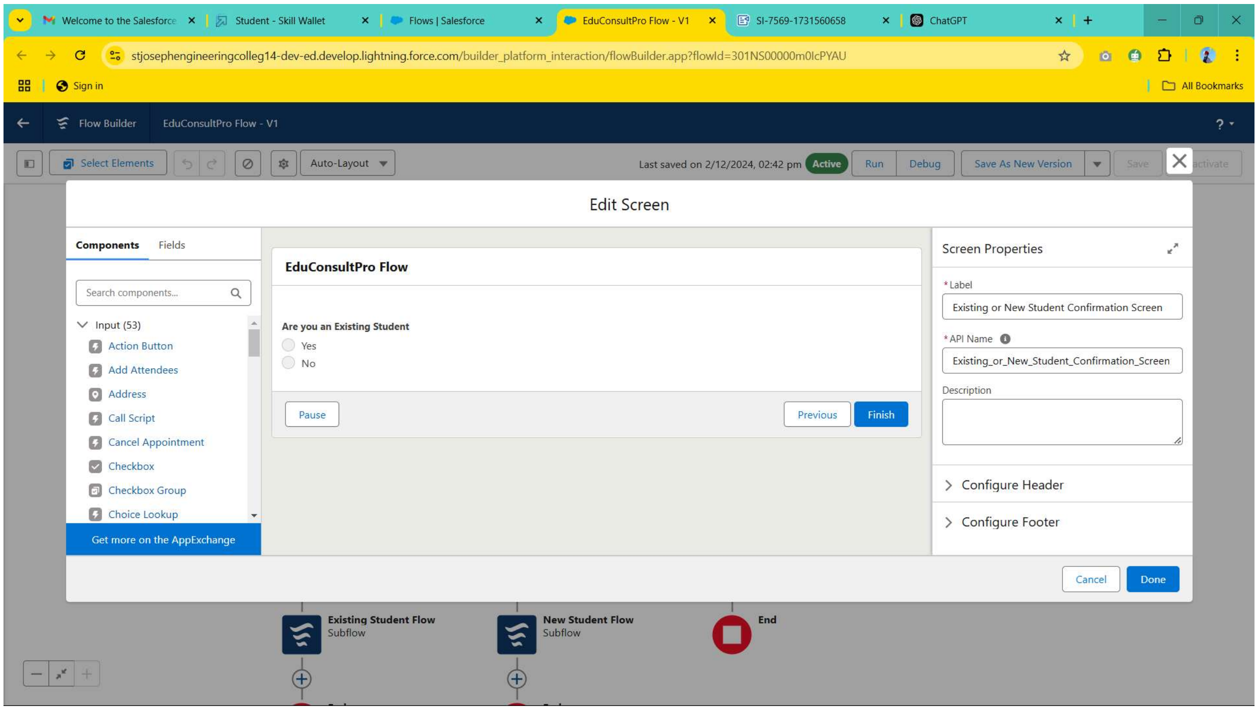

Welcome to Salesforce: Verify y
Flows | Salesforce
EduConsultantPro Existing Stud
SI-7569-1731560658
ChatGPT
stjosephengineeringcolleg14-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301NS00000nPSwCYAW
Sign in
All Bookmarks
Flow Builder
EduConsultantPro Existing Student Flow - V2
Select Elements
Auto-Layout
Last saved on 5/12/2024, 09:27 am
Active
Run
Debug
Save As New Version
Save
Deactivate
Start
Get Student Info
Screen
Get Rec
Get Records
Display Student Details
Screen
Appointment or Case
Decision
Appointment
Case
Default
Appointment Booking Screen
Screen
Create Student Case
Subflow
End
Get Consultant Rec
Get Records
End
Create Appointment
Create Records
Confirmation Screen
Screen
End

Create a ScreenFlow to Combine all the flows at one place

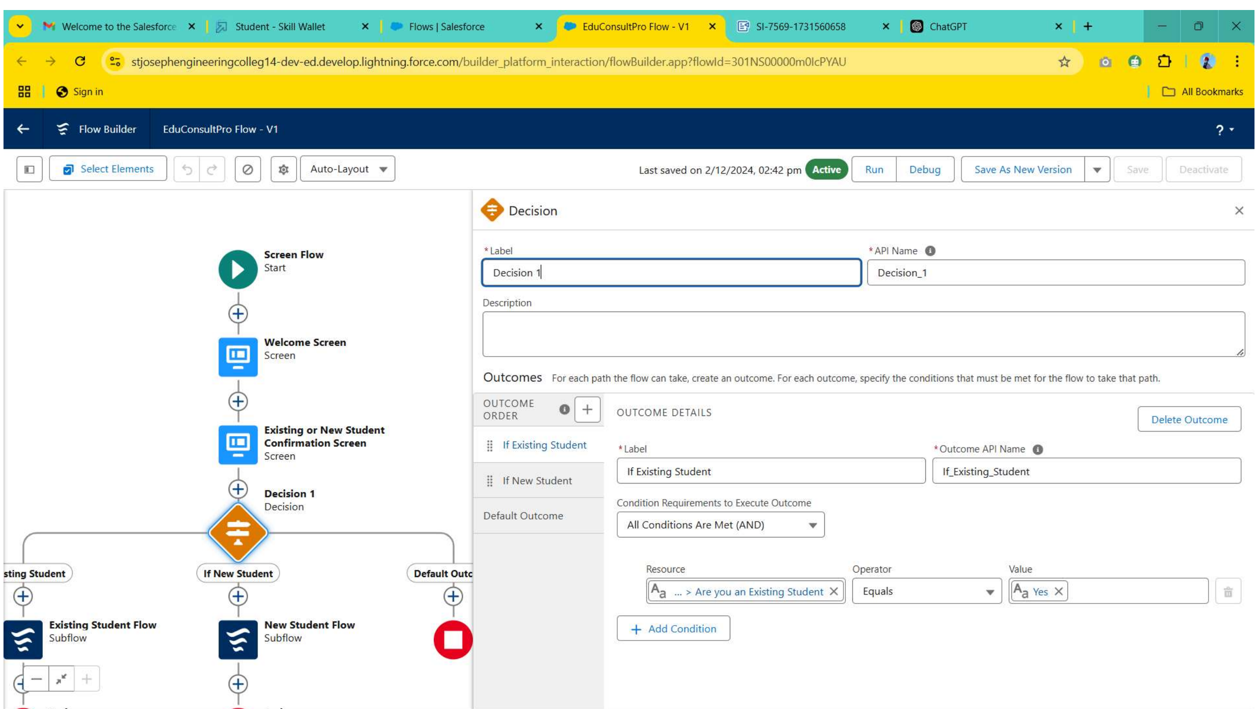
Add a Welcome screen element



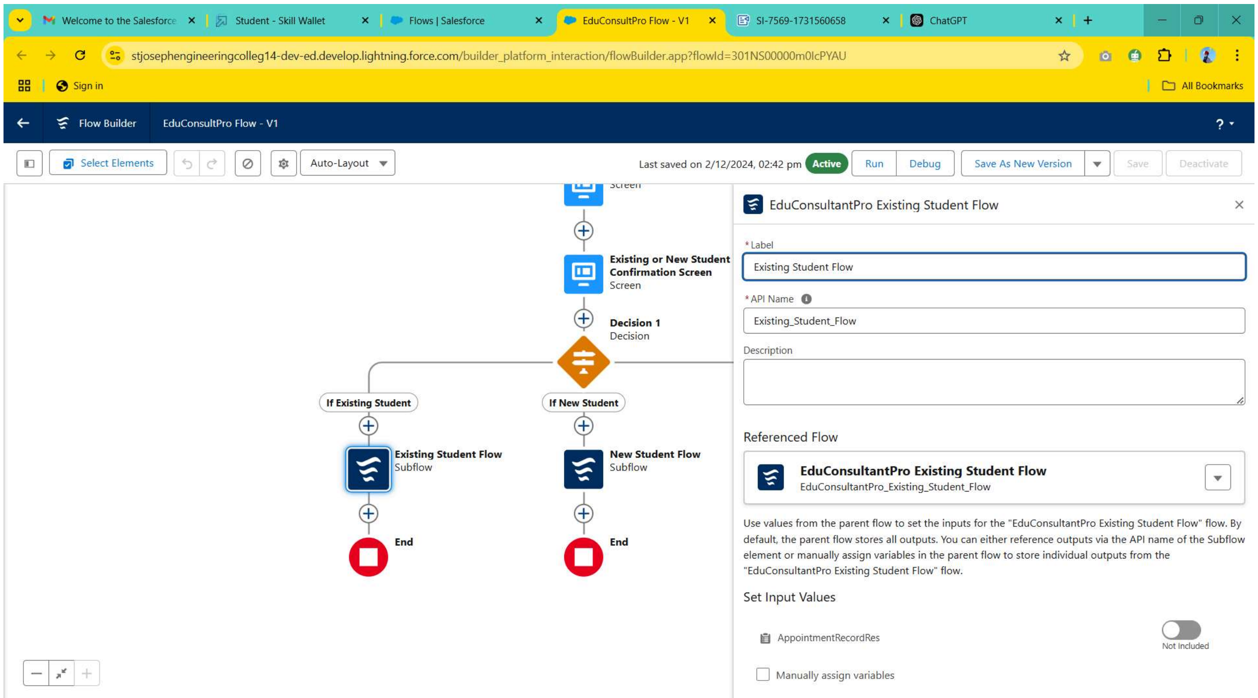
Add a screen element to ask weather he is new student or old student



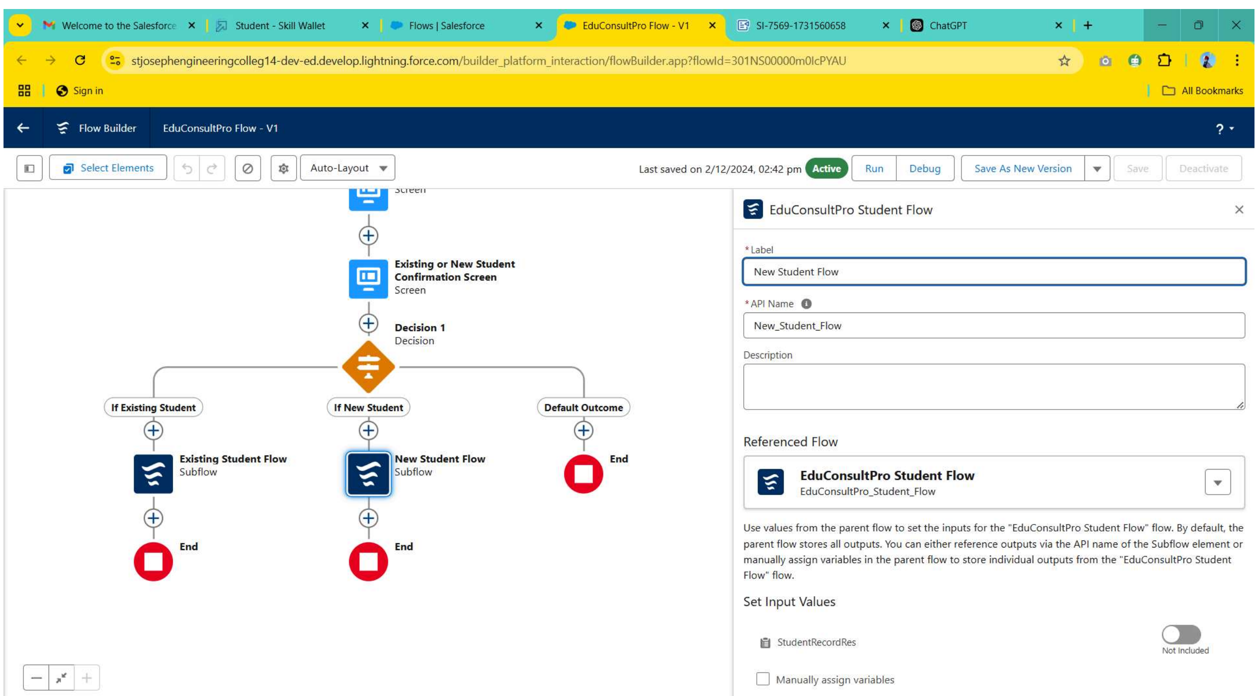
Add decision element

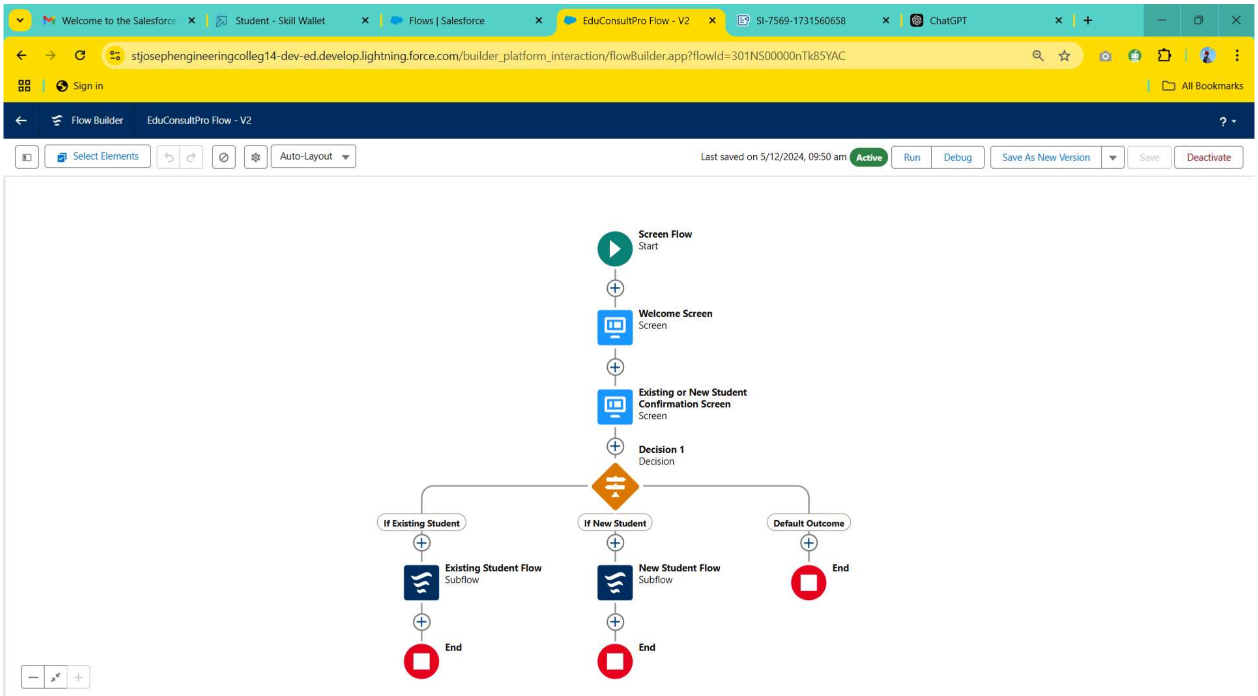


Add a subflow if it is a existing student



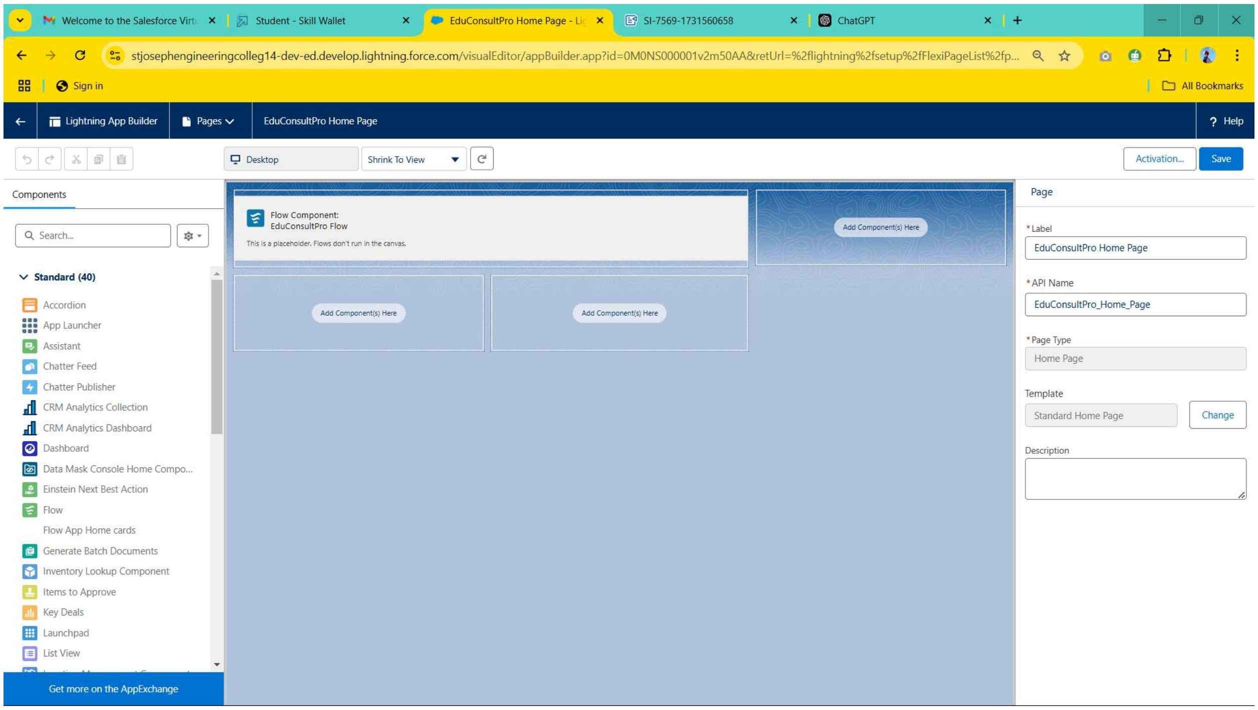
Add a subflow if it is new student





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



5.Testing and Validation

1. User Interface Testing

- Objective: Validate the functionality and usability of the Salesforce interface for end-users.
- Approach:
    - Tested the EduConsultPro app on desktop and mobile platforms to ensure responsive design.
    - Validated navigation links, object record pages, and data entry forms for completeness and accuracy.
    - Conducted manual testing of all flows using the Run and Debug options:
        - Checked whether inputs were correctly captured.
        - Ensured expected outcomes, such as student registration, email notifications, and course registration, were achieved.

2. Flow Testing

- Tested individual flows for correct data handling and automation:
    - EduConsultPro Flow: Verified proper redirection for new and existing students.
    - EduConsultPro Student Flow: Ensured correct student creation, course registration, and email notifications.
    - EduConsultantPro Existing Student Flow: Checked data retrieval for existing students and appointment or case creation.

3. End-to-End Testing

- Objective: Ensure all components integrate seamlessly.
- Approach:
    - Verified workflows, including student registration, course enrollment, and appointment scheduling, from start to finish.
    - Confirmed lookup relationships between objects functioned as expected.

4. Validation Results

- Ensured all flows were free of errors and met project requirements.
- Verified data accuracy and record integrity for objects and relationships.
- Conducted user acceptance testing (UAT) to confirm the solution met user expectations.

6.Key Scenarios Addressed by Salesforce in the Implementation Project

1. **New Student Registration and Course Enrollment**
    - Scenario: A prospective student needs to register for a course.
    - Solution:
        - A **screen flow** guides the user through entering student details, selecting a course, and automatically registering the student.
        - Sends a confirmation email to the student upon successful registration.
2. **Existing Student Consultation or Case Creation**
    - Scenario: An existing student requires an appointment with a consultant or needs to raise a case related to immigration or visa issues.

- Solution:
  - A **screen flow** fetches the student's details using their name and email.
  - Offers options to schedule an appointment or create a case linked to the student's record.

3. **Consultant Management and Appointments**
   - Scenario: Consultants manage their appointments and interact with assigned students.
   - Solution:
     - Lookup relationships between **Appointments** and **Consultants** ensure proper tracking of each consultation session.
     - Consultants can view their appointments via the **EduConsultPro** app.
4. **Streamlining Student Queries**
   - Scenario: Students inquire about services or face challenges related to immigration or visa processing.
   - Solution:
     - Cases are created for each query, linked to the student's record, and tracked for resolution.
5. **Centralized Data Management**
   - Scenario: EduConsultPro Institute needs a single source of truth for all student and consultant-related data.
   - Solution:
     - Salesforce's custom objects and relationships ensure all data is stored, connected, and accessible within the **EduConsultPro** app.
6. **Automated Communication**
   - Scenario: Students need timely notifications about their registration, appointments, or cases.
   - Solution:
     - Email notifications are automated within flows to keep students informed.
7. **Cross-Platform Accessibility**
   - Scenario: Staff and consultants require access to the system on both desktop and mobile devices.
   - Solution:
     - The **EduConsultPro** app is designed for both desktop and mobile form factors using Salesforce Lightning App Builder.

7.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.