A CRM Application To Manage The Services Offered By An Institution

BY

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Project Abstract

EduConsultPro Institute, a leading educational organization offering a diverse range of courses and programs, is experiencing a surge in the number of prospective students seeking admission. This growth has exposed several challenges in managing the admission process, addressing student inquiries, and delivering consulting services effectively. The existing manual processes are inefficient, error-prone, and result in delays, creating dissatisfaction among both students and staff. To overcome these issues and optimize operations, EduConsultPro Institute has decided to adopt Salesforce CRM. This project will focus on automating the admission application process, establishing an approval workflow for consulting requests, managing consulting services and appointments, and tracking immigration cases. By harnessing the powerful features of Salesforce CRM, the institute aims to enhance the experience of prospective students while improving operational efficiency for its admissions team.

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1. Requirements

- **Admission Application Management**

Prospective students can complete and submit admission application forms through the institute's website or portal. These forms will collect comprehensive details, including personal information, academic history, and qualifications. Upon submission, the applications will be securely stored in Salesforce CRM, and students will receive automated email notifications confirming their submission. Admissions staff can utilize Salesforce's reporting and dashboard features to analyze key metrics, such as application volumes, acceptance rates, and enrollment trends.

- **Approval Workflow for Consulting Requests**

Salesforce will facilitate an approval workflow for reviewing and processing consulting requests. Automated email alerts will notify students of the approval or rejection of their requests. Each consulting request will be submitted to the system automatically upon creation to ensure seamless tracking and processing.

- **Consulting Services Management**

Prospective students can request consulting services directly via the institute's website or portal. The consulting request form will gather key details, including student information, consulting preferences, and required areas of expertise. Submitted requests will be logged in Salesforce CRM, triggering automated email notifications to consultants and advisors. Consultants can view, accept, and manage requests within the Salesforce interface. Appointment scheduling, including specifying the date, time, and purpose, will be streamlined through Salesforce. Additionally, the status of appointments (e.g., scheduled, completed, or canceled) will be monitored and updated in real time.

- **Immigration Case Management**

Students will have multiple options to initiate immigration cases, including phone, email, or web submissions. An immigration case submission form will capture all relevant details and required information. Once submitted, cases will be logged in Salesforce CRM, and automated email notifications will alert immigration agents and case managers of new cases. Agents can view, process, and monitor cases directly within Salesforce. The system will track case statuses (e.g., open, in progress, or closed) and include integrated tools for document management and collaboration to enhance efficiency and accuracy.

2. Creating Objects from Spreadsheets

In Salesforce, objects function as database tables designed to store data relevant to your organization. Each object consists of records (which are similar to rows) and fields (which are akin to columns), providing an organized structure for your data. These objects are essential for managing and interlinking different types of information, facilitating efficient data tracking, reporting, and analysis within the Salesforce environment.

To create objects from spreadsheets in Salesforce, follow these steps:

1. Prepare Your Spreadsheet: Ensure your spreadsheet data is clean and well-organized. Each column should correspond to a field in Salesforce, and each row should represent a record.

2. Save the Spreadsheet: Save your spreadsheet in a compatible format, typically CSV (Comma Separated Values).

3. Log in to Salesforce: Access Salesforce and navigate to the setup menu.

4. Use the Data Import Wizard: In the setup menu, find the Data Import Wizard. Select the standard or custom object you want to create records for.

5. Upload Your Spreadsheet: Follow the wizard to upload your CSV file. Map the spreadsheet columns to Salesforce fields.

6. Start the Import: Review the mappings, and start the import process. Salesforce will create records based on your spreadsheet data, allowing you to manage and analyze it within the platform.

Course Object:

Course Object

The Course object is a critical component of the CRM application, designed to manage the educational services offered by the institution. It captures essential details about each course, such as its description, duration, and associated instructors. By creating a centralized and organized repository of course information, the institution can efficiently monitor, manage, and evaluate its offerings. This enhances the ability to provide personalized experiences to students and streamlines administrative workflows.

Consultant Object

The Consultant object plays a vital role in the CRM application, enabling the management of institutional services. It stores detailed information about each consultant, including their areas of expertise, availability, and the courses they are assigned to.

Student Object

The Student object is a key element of the CRM application, designed to manage the institution's services. It maintains comprehensive student records, including enrollment details, contact information, and course registrations. By organizing student data in a structured manner, the institution can track progress and deliver tailored communication to meet individual needs.

Appointment Object

The Appointment object is an integral part of the CRM application, facilitating efficient management of institutional services. It stores detailed information about appointments, such as dates, times, participants, and purposes. Centralizing appointment data helps streamline scheduling, ensures timely follow-ups, and optimizes resource allocation, ultimately enhancing service delivery.

Creating a Screen Flow for the Student Admission Application Process

The Screen Flow for the Student Admission Application Process is a robust feature designed to automate and optimize the admission process. It facilitates efficient data collection, course selection, and record creation, minimizing manual errors and saving time. Additionally, the flow enhances the applicant experience by providing instant feedback and communication while enabling the institution to better manage student data, monitor admissions, and deliver personalized educational services.

Steps to Create the Screen Flow

1. **Start the Flow**
   - Begin by creating a new Screen Flow in Salesforce Flow Builder.
2. **Student Info Screen**
   - Add a "Screen" element and name it "Student Info."
   - Include fields to collect:
     - Text fields: Name, Email, Phone Number
     - Picklist: Gender
     - Date field: Date of Birth
   - Mark required fields and save.
3. **Create Student Record**
   - Add a "Create Records" element and name it "Create Student Record."
   - Configure it to create a single record in the Student object.
   - Map input fields to corresponding Student object fields.
4. **Course Screen**
   - Add another "Screen" element and name it "Course Screen."
   - Add a picklist field for course selection with options such as IELTS, GRE, GMAT, Duolingo, and TOEFL.
5. **Selecting Course Decision**
   - Add a "Decision" element named "Selecting Course."
   - Define decision outcomes based on the selected course (e.g., Selected IELTS, Selected GRE, etc.).
6. **Course-Specific Records**
   - For each course, create the following:
     - A "Get Records" element to fetch relevant course records.
     - A "Create Records" element to log the registration in the respective course object.
     - Repeat for IELTS, GRE, GMAT, Duolingo, and TOEFL.
7. **Send Confirmation Email**
   - Add an "Action" element named "Send Email to Student."
   - Configure the email template, recipient (using the collected email), and additional details.
8. **Success Screen**
   - Add a final "Screen" element named "Success Screen."
   - Include a display text component confirming successful registration.

Connecting the Elements

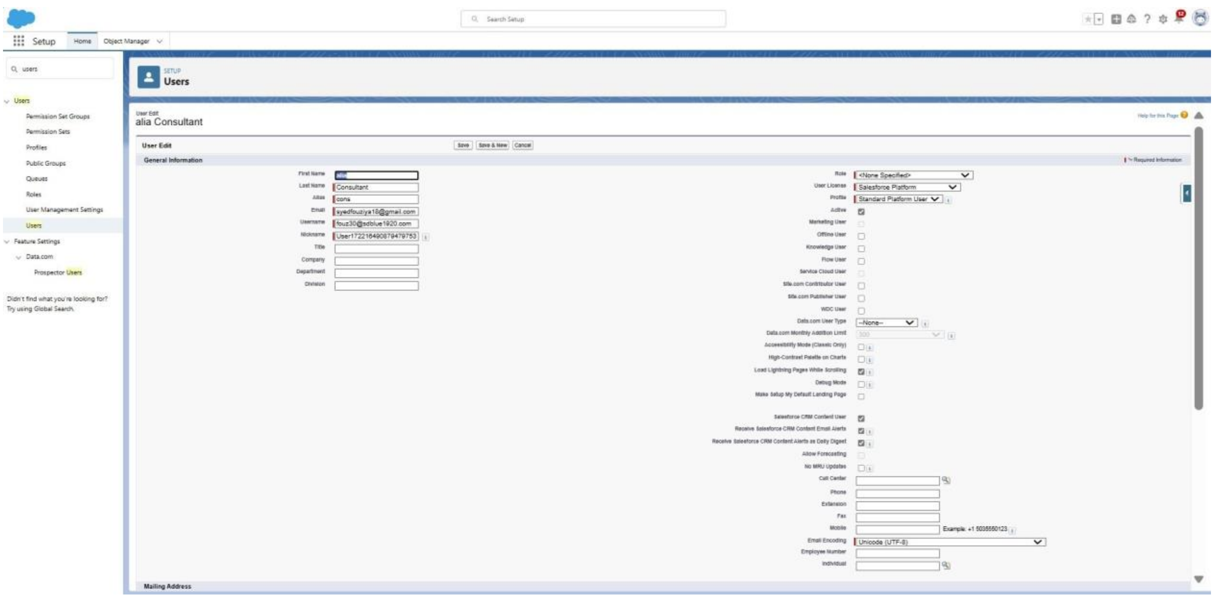
- Connect the flow elements as follows:
  - Start → Student Info → Create Student Record → Course Screen → Selecting Course.
  - Branch from the "Selecting Course" decision to each course-specific path (IELTS, GRE, GMAT, Duolingo, TOEFL).

- Each course path connects to the "Send Email to Student" action.
- The "Send Email to Student" action connects to the "Success Screen."

This flow ensures a streamlined and user-friendly admission process while providing the institution with efficient data management and operational control.

3. Creating Users and Configuring User Settings in Salesforce

In a CRM application for managing services offered by an institution, creating and configuring user settings is a crucial task to ensure that all users have the appropriate access and capabilities to perform their roles effectively. Below are the detailed steps to create users and configure their settings in Salesforce.



Steps to Create Users

1. **Navigate to Users**
    a. InSalesforce, go to the Setup menu by clicking on the gear icon in the top-rightcorner.
    b. Inthe left-hand sidebar, under "Administer," expand the "Manage Users" sectionand click on "Users."
2. **Create New User**
    a. Click on the "New User" button at the top of the user list.
    b. Fill in the user details:

    FirstName and Last Name: Enter the user's first and last name.

    Alias: This is typically a short name for the user.

    Email: Enter the user's email address.

    Username: Enter a unique username in the format of an emailaddress.

    Nickname: Enter a nickname if desired.

    Role: Select the user's role from the dropdown menu.

    User License: Choose the appropriate license for the user,"Salesforce Platform."

Profile: Select the profilethat matches the user's job functions and permissions,like "Standard Platform User" or "System Administrator."

c. Additional settings include options like Marketing User, Offline User, KnowledgeUser,etc., which can be checkedbased on the user's needs.

3. **Set User Preferences**

a. Configure user-specific settings such as:

EmailEncoding: Choose the appropriate email encoding format.

Locale, Time Zone, and Language: Set these according to the user'slocation.

Accessibility Mode: Enable this if the user requiresenhanced accessibility.

4. **Save the User**

a. Once all the necessary information and preferences are entered, click"Save" or"Save & New" to create the user and immediately proceed to create anotherone.

Configuring User Settings:

1. **Edit User Details**

To modify an existinguser's details.

Update the necessary fields and settings as described above.

2. **Assign Permission Set**

Permission sets grantadditional permissions beyondthose defined by the user.Navigate to "Permission Sets" in the Setup menu.
Assign the relevant permission sets to the user.

3. **Profile and Role Adjustments**

Profiles control what users can see and do in Salesforce.

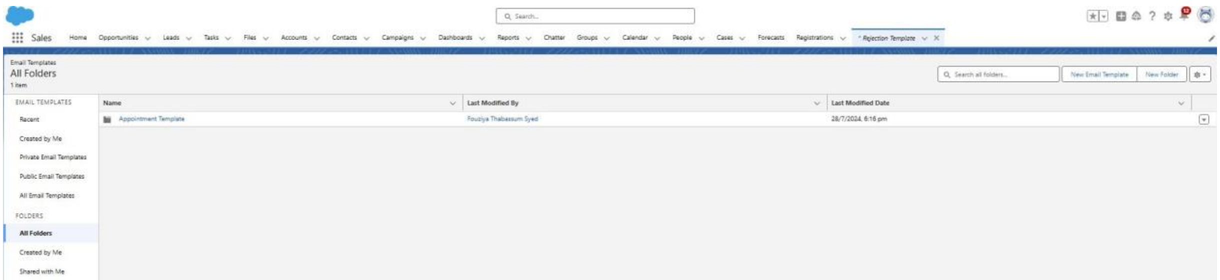
Roles control the level of access users have to data based on the organization.Adjust these settings as needed to ensure users have the appropriate access.

5. Approval Process for Appointment Object

In this project, we have implemented a structured approach to creating and managing email templates in Salesforce. First, we enabled Lightning Email Templates by navigating to Setup, using the Quick Find box to locate "Templates," and toggling on the Lightning Email Templates option.

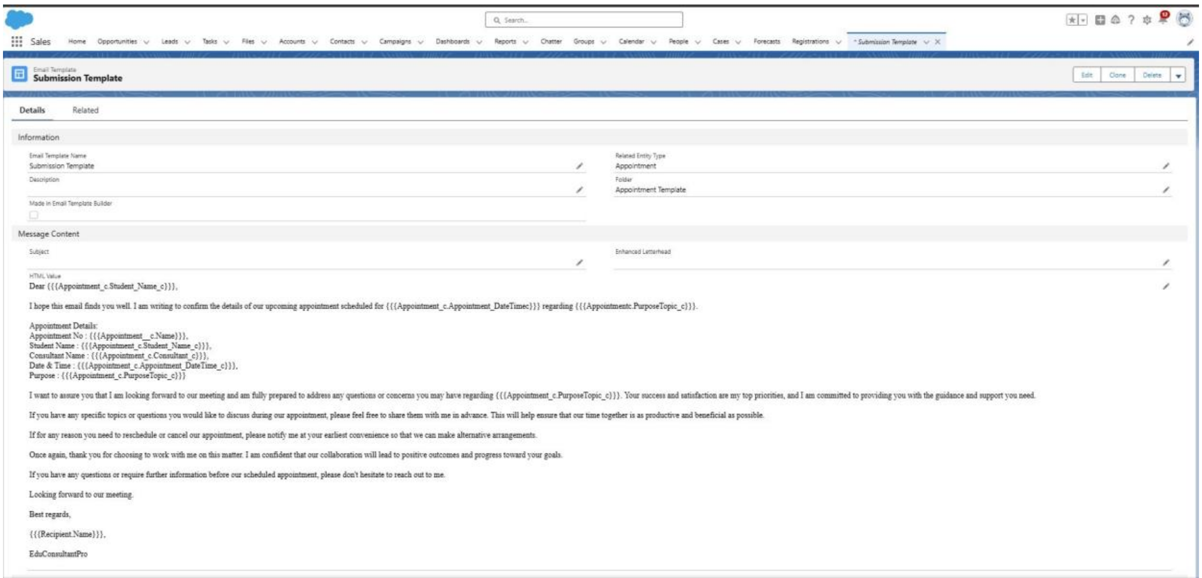
Creating the Appointment TemplateFolder

we created a dedicated folder named "Appointment Template" in the Email Templates sectionaccessed via the App Launcher. Its role in centralizing and managing these templates ensures that our appointment scheduling process is streamlined and professional, ultimately contributing tothe overall success of our project.



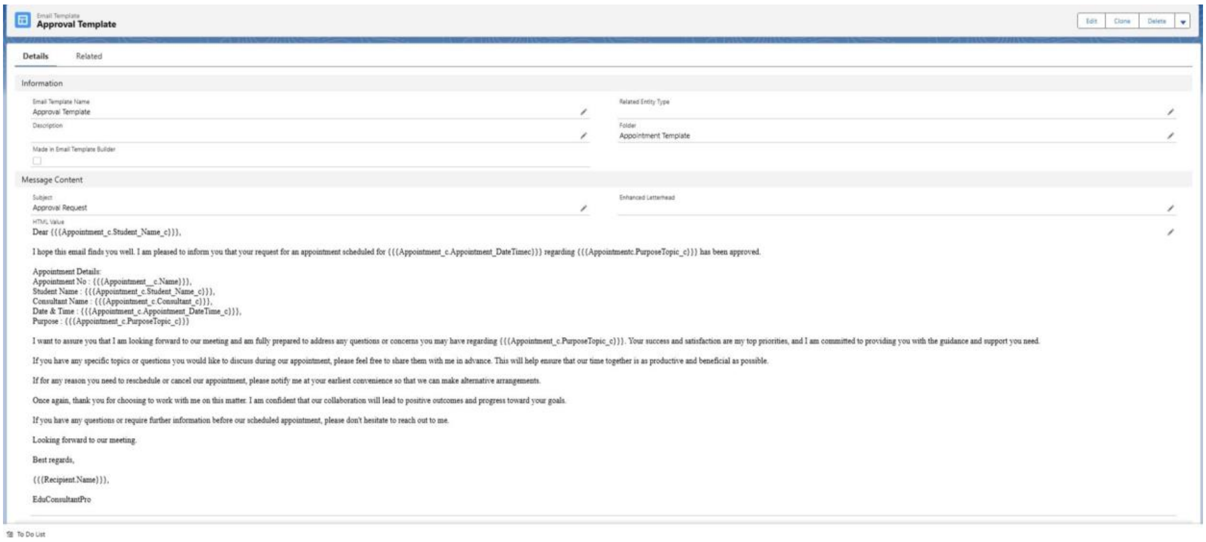
Creating the Submission Template

we created a dedicated folder named "Appointment Template" in the Email Templates sectionaccessed via the App Launcher. Within this Appointment Template folder, we developed a new email templatetitled "Submission Template," ensuring to input relevant detailssuch as the template name, description, and subject. The HTML content for this template was meticulously crafted to provide a clear and professional confirmation message for recipients.



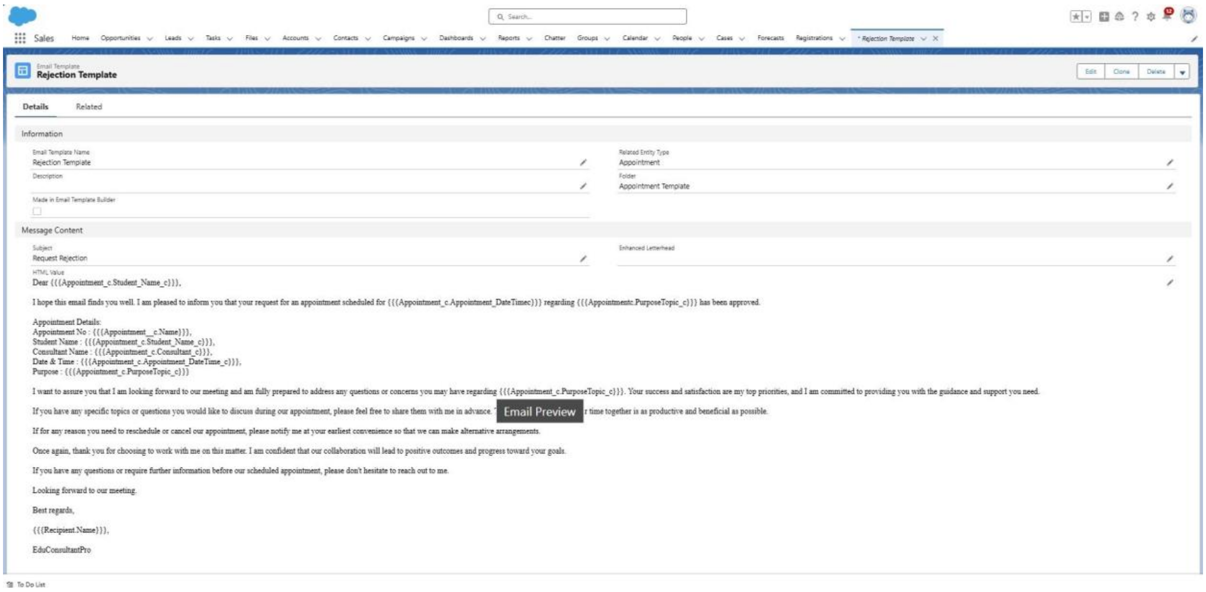
Creating the Approval Template

The Approval Template is a crucial component of our project, facilitating clear and efficient communication regardingappointment approvals.the ApprovalTemplate is a vital tool for maintaining clear, professional, and effective communication with students regardingappointment approvals. It enhances the overall efficiency of our appointment scheduling process and contributes to the success of our project by ensuring that all parties are well-informed and prepared for their meetings.



Creating the Rejection Template

The Rejection Template is an essential component of our project, designed to handle situations where appointment requests cannot be approved. the Rejection Template is a crucial tool for managing situations where appointment requestscannot be approved.It ensures clear, professional, and compassionate communication with students, encourages proactive problem- solving,and maintains positiverelationships by demonstrating support and understanding.



Creating an Approval Process:

The "Appointment Approval" process was implemented to ensure a streamlined and secure workflow for managing appointment requests. This approval process enforces strict control over appointment data, allowing only designated managersto approve or reject submissions. By locking records upon submission, it prevents unauthorized changes and ensures data integrity throughout the approval cycle. Automated email alerts are integrated to keep all relevant parties informed at each stage, enhancingcommunication and efficiency. This structured approachensures that appointments are reviewed and approved in a consistent manner, aligning with organizational policies and maintaining high standards of data accuracy and accountability. The implementation of this process ultimately leads to improved operational efficiency and better resource management.

6. Creating a Record triggered flow

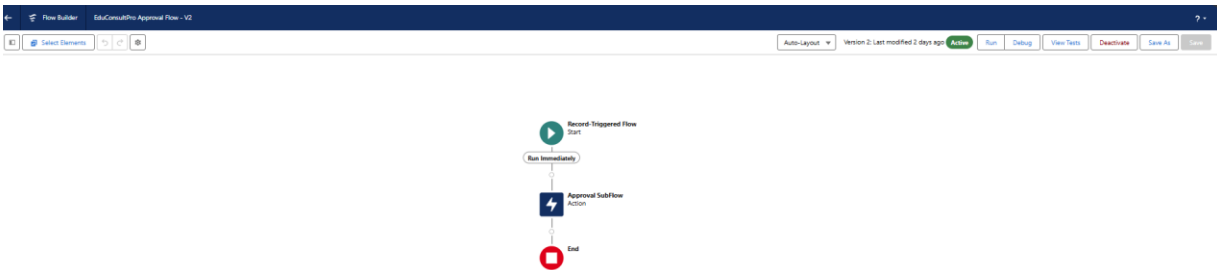
The "EduConsultPro Approval Flow - V2" is a Record-Triggered Flow designed to automate theapproval process for appointment requestswithin the EduConsultPro system. This flow is triggered immediately upon the creation or update of a record, ensuring that the approval process begins without delay.

Flow Structure:

1. **Record-Triggered Flow (Start):** This element initiates the flow as soon as a specified record event occurs,such as the creation or update of an appointment request. The immediateexecution ensures that the approvalprocess is triggeredin real-time, maintaining the efficiency and responsiveness of the system.

2. **Approval SubFlow (Action):** This component of the flow invokes a subflow dedicated to handling the approvallogic. The subflowencapsulates the necessaryactions and decisions required to process the approval, ensuring modularity and reusability of the approval logic. By separating the approval logic into a subflow, it becomes easier to maintain and updatewithout impacting the overall flow structure.

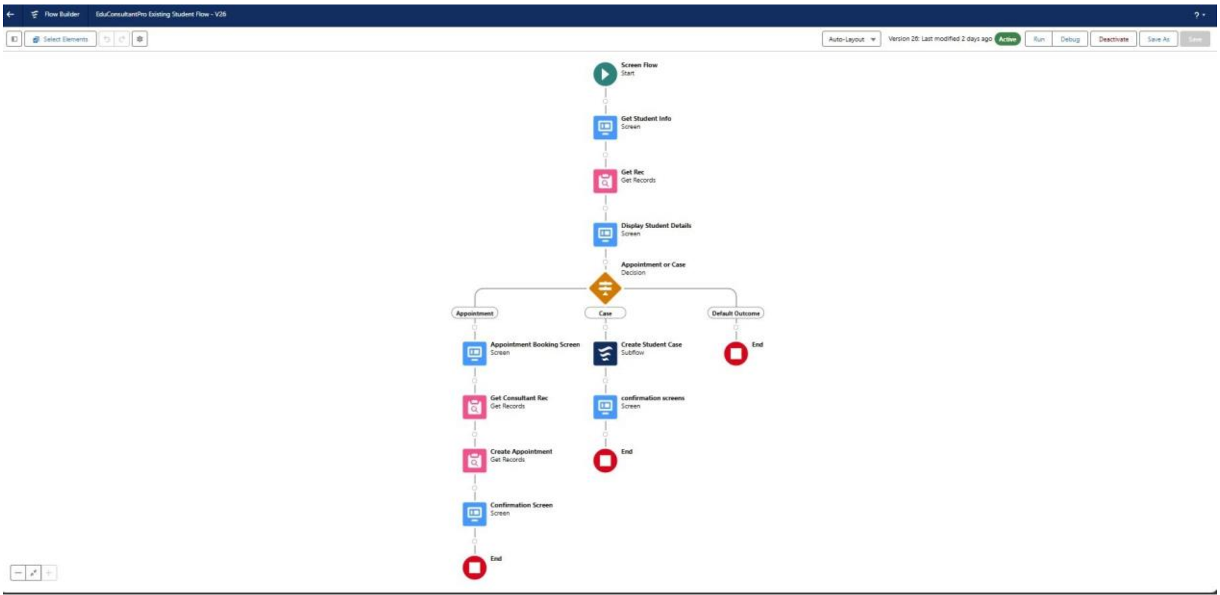
3. **End:** The flow concludes after executing the necessary actionswithin the approvalsubflow. This signifiesthe completion of the automatedapproval process for the triggered record.



The "EduConsultPro Approval Flow" is a critical component in automating and optimizing the appointment approval processwithin the EduConsultPro system. Its implementation ensures efficient, consistent, and real-time processing of appointment requests, ultimately contributing to improved operational performance and resource management.

7. ScreenFlow for ExistingStudent to Book an Appointment

This ScreenFlow facilitates the process for existing students to book appointments or create cases within an educational consultancy system. The flow initiates by retrieving and displaying student information, then directs the student based on their choice of booking an appointment or creatinga case.



Screen Flow Start: This marks the beginning of the flow.

Get Student Info Screen: The flow presents a screen to gather necessary information from the student, such as student ID or other identifying details.

Get Records: The flow retrieves the student's records from the database using the information provided in the previous step.

Display Student Details Screen: The retrieved student details are displayed to the student for verification purposes.

Appointment or Case Decision: The flow presents a decision point where the student can choose to either book an appointment or create a case.

Appointment Path:

Appointment Booking Screen: If the student opts to book an appointment, they are directed to a screen toselect the appointment details such as date, time, and purpose.

Get Consultant Records: The flow retrieves records of available consultants for the student to choose from.

Create Appointment Records: the flow creates an appointment record in the database.

Confirmation Screen: The flow displays a confirmation screen confirming that the appointment has been successfully booked.

End : This step marks the endof the flow for the appointment bookingpath.

Case Path:

Create Student Case Subflow: If the student opts to create a case, a subflow is initiated to handle the case creation process, which may include collecting additional information and documenting the case.

Confirmation Screen: The flow displays a confirmation screen confirming that the case has been successfully created.

End : This step marksthe end of the flow for the case creation path.

Default OutcomePath:

End : If neither an appointment nor a case is chosen, the flow reaches the default outcome, effectively ending the flow.

Implementing this flow improves the overall management of student appointments and cases, ensuring a seamless and efficient processfor both studentsand the educational consultancy.

8. Combining All Flows into a SingleFlow

This combined ScreenFlow integrates the processes for managing both existing and new students within an educational consultancy system. It starts by welcoming the user and then directs them based on whether they are an existing student or a new student. This approach ensures a seamlessand unified experience for all students.

Steps to Create the Combined Flow:

Screen Flow Start : This marksthe beginning of the combinedflow.

Welcome Screen : A welcome screen is presented to the user, providing an introduction and necessary information.

Existing or New Student Confirmation Screen : The flow presents a screen where the user can confirmwhether they are an existing student or a new student.

Decision Point (Decision 1) : A decision point is introduced to direct the user based on their selection from the previous step.

- **If Existing Student:** The user is directedto the Existing Student Flow subflow.
- **If Not an Existing Student:** The user is directedto the New Student Flow subflow.
- **Default Outcome :** If no selection is made, the flow reachesthe default outcome.

Existing Student Flow Subflow: This subflow handles the process for existing students, guiding them throughnecessary steps such as booking an appointment or creating a case.

New Student Flow Subflow : This subflow handles the process for new students, guiding them through necessary steps such as registration and initial consultations.

End : Each subflow and the main flow conclude with an end step, marking the completion of the process.

9. Creating a Lightning App Page

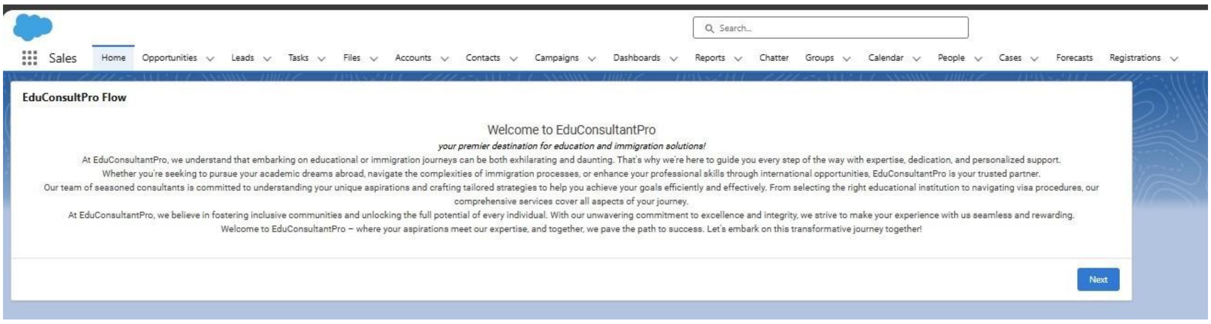
To create a customized home page in Salesforce for your project, start by navigating to the Lightning App Builder through Setup. Enter "App Builder" in the Quick Find box, and click on "Lightning App Builder." Begin the process by clicking "New" and selecting "Home Page," then proceed by naming the page "EduConsultPro Home Page." Choose the Standard Home Page template and finalize this step by clicking "Done."

Next, drag the Flow component into the top-right region of the page. Search for the specific flow named "EduConsultantPro Flow" and save your changes. To make this page functional and accessible, click "Activate," and assign it to the appropriate apps and profiles. Choose the Sales app, then assign it to the "System Administrator" profile. After reviewing your selections, click "Save" to complete the setup.

This process is essential for your projectas it customizes the user interface, integrates key components like the "EduConsultantPro Flow," and ensures that the relevant stakeholders, suchas system administrators, have streamlined access to vital functionalities within the CRM. This setup enhancesthe overall efficiency and user experience of the EduConsultPro application.

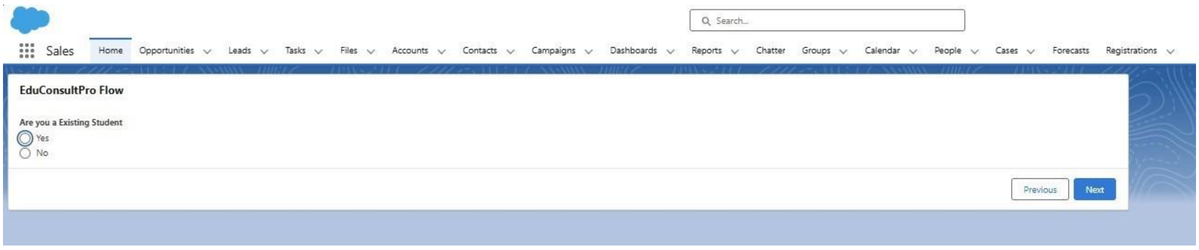
Output:

EduConsultPro CRM - WelcomePage :



The screenshot displaysthe initial page of your CRM application, specifically designed to manage the services offered by an institution. The page, titled "EduConsultPro Flow," serves as a welcoming interfacefor users accessing the system.The central portion of the page is dedicated to an introduction under the heading "Welcome to EduConsultPro," highlighting the application's purpose. It outlines the key services provided by EduConsultPro, emphasizing its role in guiding users through educational and immigration processes with expertise and personalized support. At the bottom right, a "Next" button is visible, likely designed to guide users through subsequent steps or processes within the application.

EduConsultPro CRM - StudentStatus Confirmation:



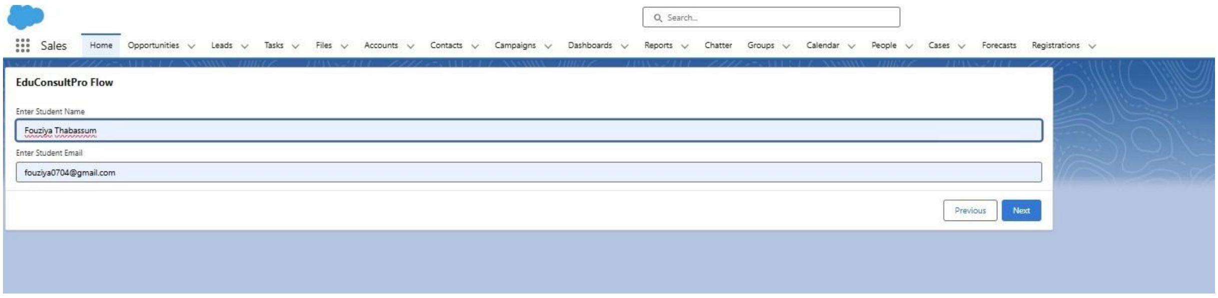
The second page of your CRM application, as shown in the screenshot, continues within the "EduConsultPro Flow" and presents the user with a simple but essential question: "Are you an Existing Student?" This step is likely part of a process to customize the user experience based on their status.

Two radio buttonoptions are provided:

- ➢**Yes**:The user selectsthis if they are alreadyenrolled or registered within the institution.
- ➢**No**: The user selects this if they are a new or prospective student.

There are navigation buttons, "Previous" and "Next," allowing the user to either go back to the previous step or proceed to the next stage of the process. This page helps in identifying the user's currentrelationship with the institution, which is crucialfor guiding them through the appropriate workflow,whether that involvesupdating existing recordsor creating new ones.

EduConsultPro CRM - StudentInformation Entry:



This page appearsafter the user has selected"Yes" to indicatethat they are an existingstudent.

Enter Student Name: The user is required to input their full name.

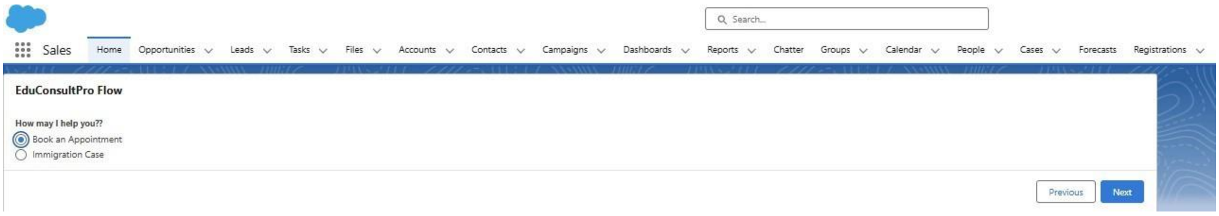
Enter Student Email: The user must provide their email address.

These inputs are crucial for identifying the student in the system, allowing the application to retrieve or update the corresponding records accurately. Once the details are entered, the user can navigate forward by clicking the "Next" button or go back to the previous screen using the "Previous" button.

Service Selection: The user is prompted with the question,"How may I help you?" followedbytwo options:

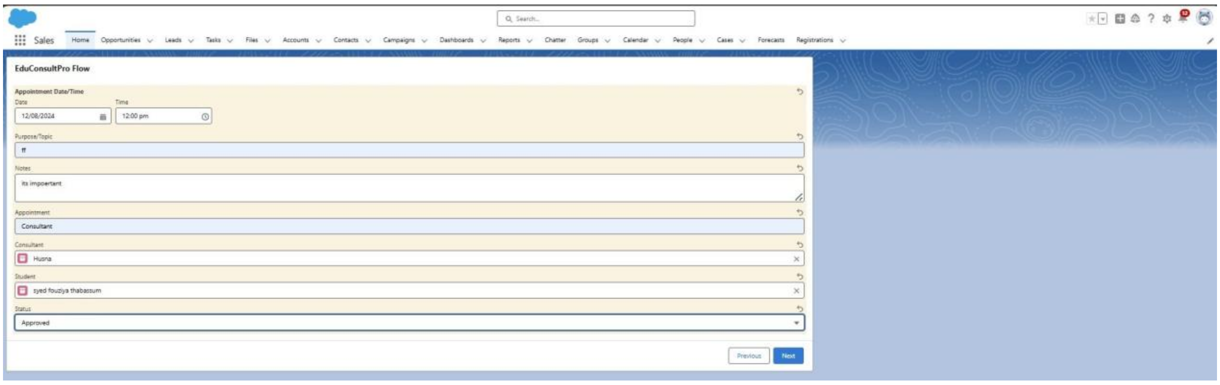
> **Book an Appointment**: Likely directs the user to schedule a meeting or consultation.
>
> **Immigration Case**: Possibly leads to initiating or managing an immigration-relatedservice

Appointment BookingSelection for ExistingStudent



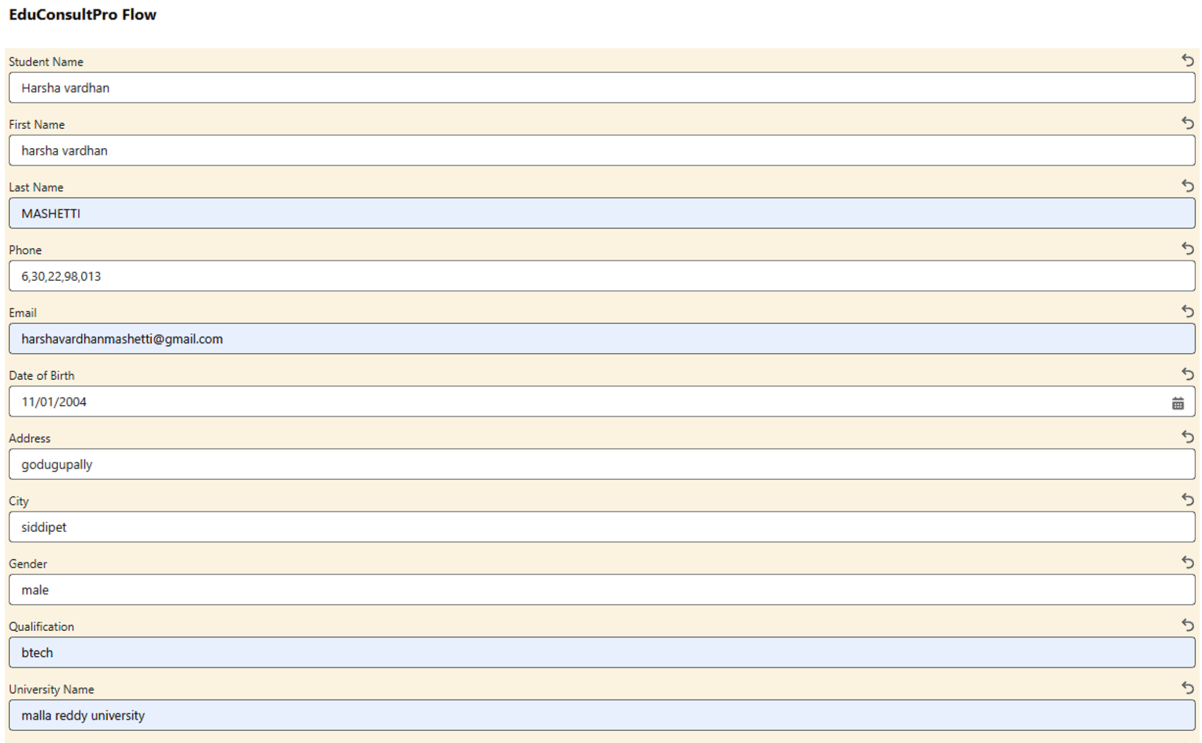
In this EduConsultPro Flow screen, an existing student is presented with two service options: "Book an Appointment" or "Immigration Case." The question "How may I help you?" guides the student to select the service they need. In this scenario, the student has chosen the "Book an Appointment" option, indicating their desire to schedule a consultation or meeting, likely with a consultant or advisor. The student can then click "Next" to proceed with the appointment booking process or "Previous" to return to an earlier step. This screen is essential for directing the student to the appropriate service, ensuring that their specificneeds are met efficiently.

EduConsultPro Flow - ServiceSelection:



In this screenshot from a CRM application, you are in the "EduConsultPro Flow," which appears to be a custom workflow or wizard designed to guide users through a series of steps to manage services offered by an institution. The interface is part of a Salesforce CRM, as indicated by the Salesforce branding and navigation bar at the top.

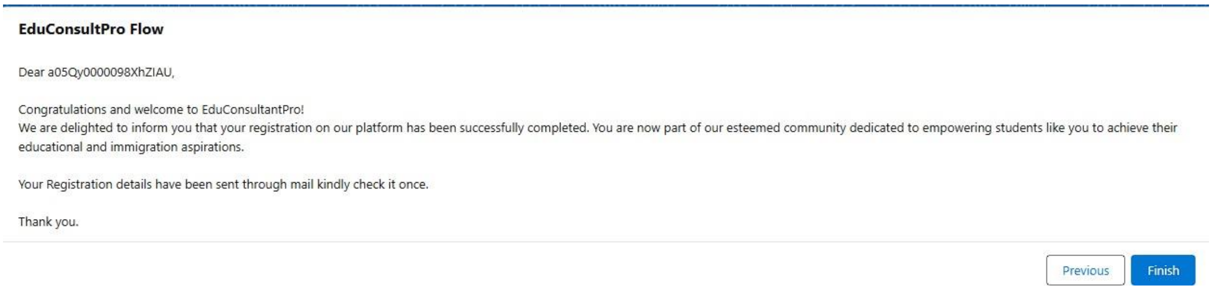
NewConsultant Creation in EduConsultPro Flow:



In the above screenshot, you're continuing through the EduConsultPro Flow within the CRM application. Here, you seem to be at a step where the user needs to either select an existing consultant or create a new consultant entry.Behind the pop-up form, the initial flow screen is visible, where the user was attempting to schedule an appointment and had to select a consultant. The selection of "Consultant" in the "Appointment" field triggered this form becausethe intended consultant was not found in the system.

Student Name	GANESH
First Name	GANESH
Last Name	T
phone	6302298013
email	GANESHTvvit.com
DOB	11/01/2004
Address	godugupally
City	Siddipet
Gender	Male
Qualification	B Tech
University Name	MALLA REDDY UNIVERSITY
Year of Passing	05/05/2025

Appointment Booking Confirmation for Existing User:

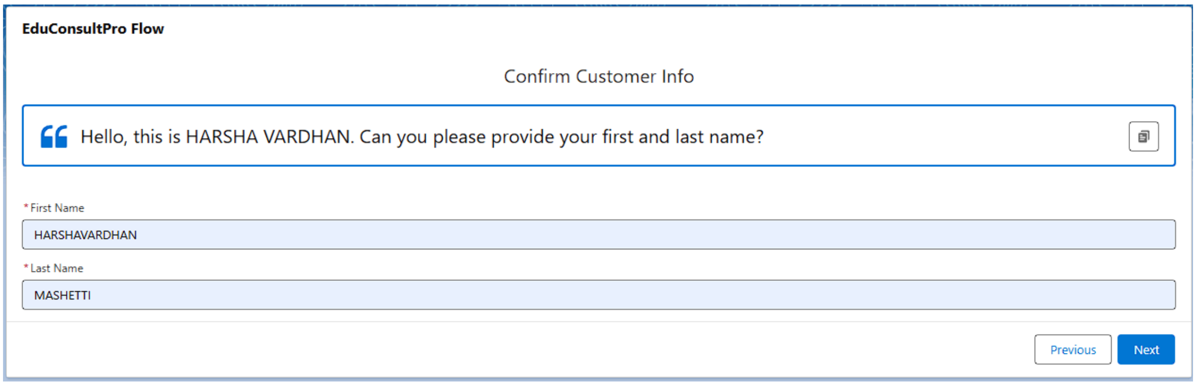


This final screen in the EduConsultPro Flow confirms the successful completion of the appointment booking process for an existinguser. It displaysa congratulatory message,welcoming the studentto EduConsultPro and informing them that their registration on the platform has been successfully completed. The screen also mentionsthat the student'sregistration details have been sent via email, and they are encouraged to check their inbox. The user can either click "Previous" to review earlier steps or "Finish" to complete the process, markingthe end of the appointment bookingflow.

Immigration Case Selection for Existing Student:

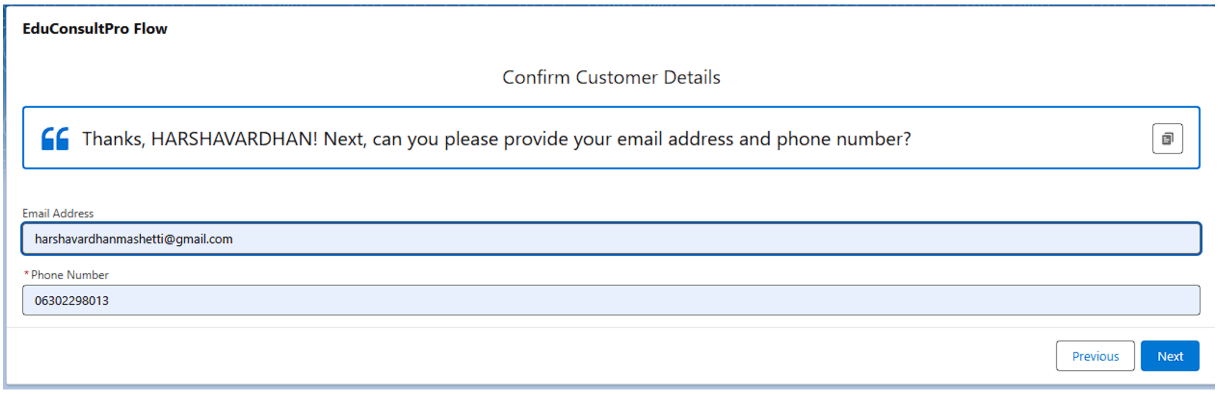
This screen is part of the EduConsultPro Flow and presents an option for an existing student toinitiate or manage an immigration case. The user is asked, "How may I help you?" and can choose between"Book an Appointment" or "Immigration Case." In this scenario,the "Immigration Case" option is selected, which suggests that the student is interested in handling issues relatedto immigration, such as visa applications, renewals, or other related services.

Confirming Customer Information:



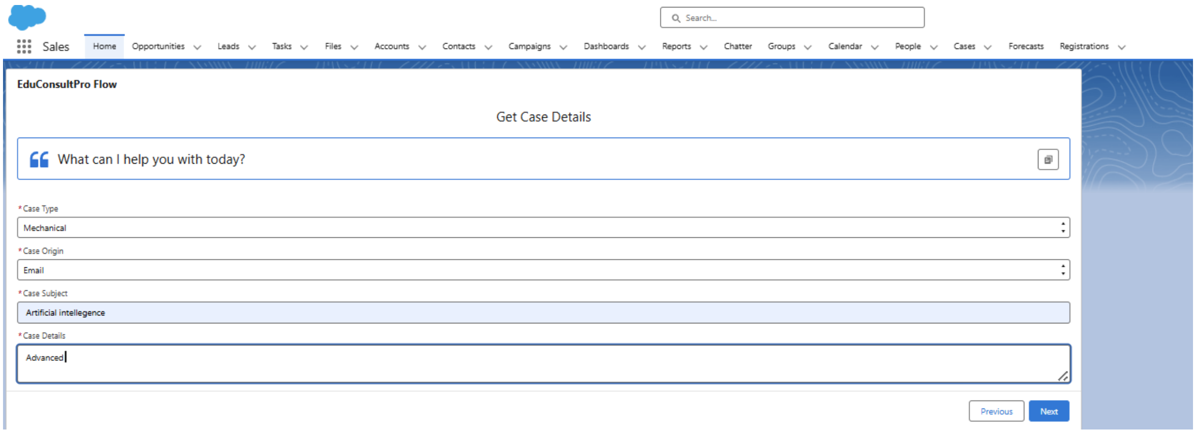
The image shows the "Confirm Customer Info" screen in a Salesforce flow, part of an immigration case management process. In this step, the customer is asked to confirm their first and last name. The user is greeted by a representative, "GANESH," and prompted toenter their first name (GANESH) and last name (T). Once the information is provided, the user can proceed by clicking the "Next" button at the bottom right corner of the screen.

Confirming CustomerContact Details:



The image depictsthe next step in the immigration case management processwithin the Salesforce flow, labeled "Confirm Customer Details." In this step, after confirming their name, the customer is now asked to provide their contact information, specifically their email address and phone number. The email address field is filled in with 21bq1a5451vvit.com and the phone number field is completed with "888888888" The user can continue to the next step by clicking the "Next" button at the bottom right corner of the screen.

Gathering Case Details for Support:



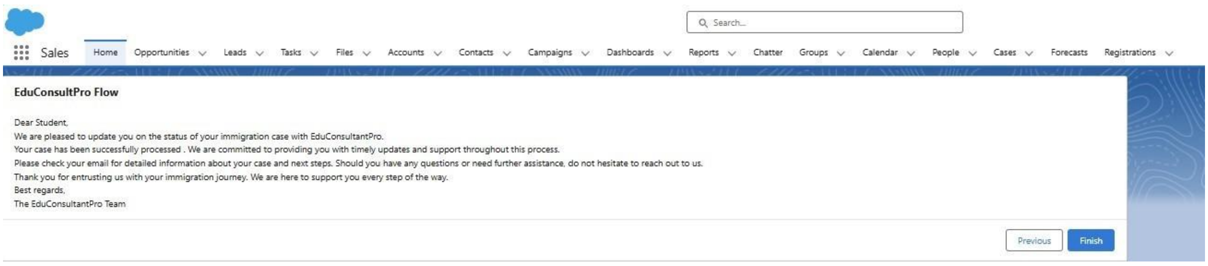
This image shows the "Get Case Details" screen in the Salesforce flow, where the customer isasked to providespecific details about their case. This step is crucial for accuratelyaddressingthe customer's needs.

The customer is prompted to fill out the following fields:

1. **Case Type:** Selected as "Mechanical."
2. **Case Origin:** Set to "Email."
3. **Case Subject:** Entered as "Artificial intelligence."
4. **Case Details:** The customer has provided the text "Advanced" to describe the specifics oftheir inquiry.

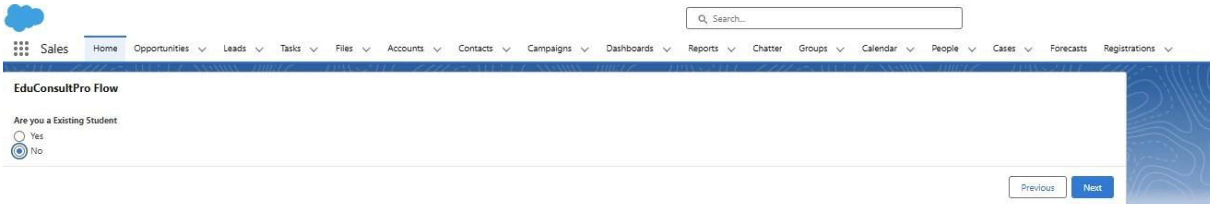
Once these details are filled in, the user can proceed by clicking the "Next" button at the bottom right corner of the screen.

Immigration Case Status Update



The communication ends with a thank you note from the EduConsultPro team, emphasizing their commitment to supporting the student throughout their immigration journey.

Non-Existing Student Selection:



If the user selects "No," the flow will likely proceed to collect information relevant to a new student, such as registration details,personal information, and academic background. The process may also include steps to set up a new student profile within the system, offer guidance on available services,or initiate a process for new student onboarding. The selection could trigger different actions or data collection steps within the flow, ensuring that the process is tailored to the needs of a new student rather than someone who already has an established profilewithin the system

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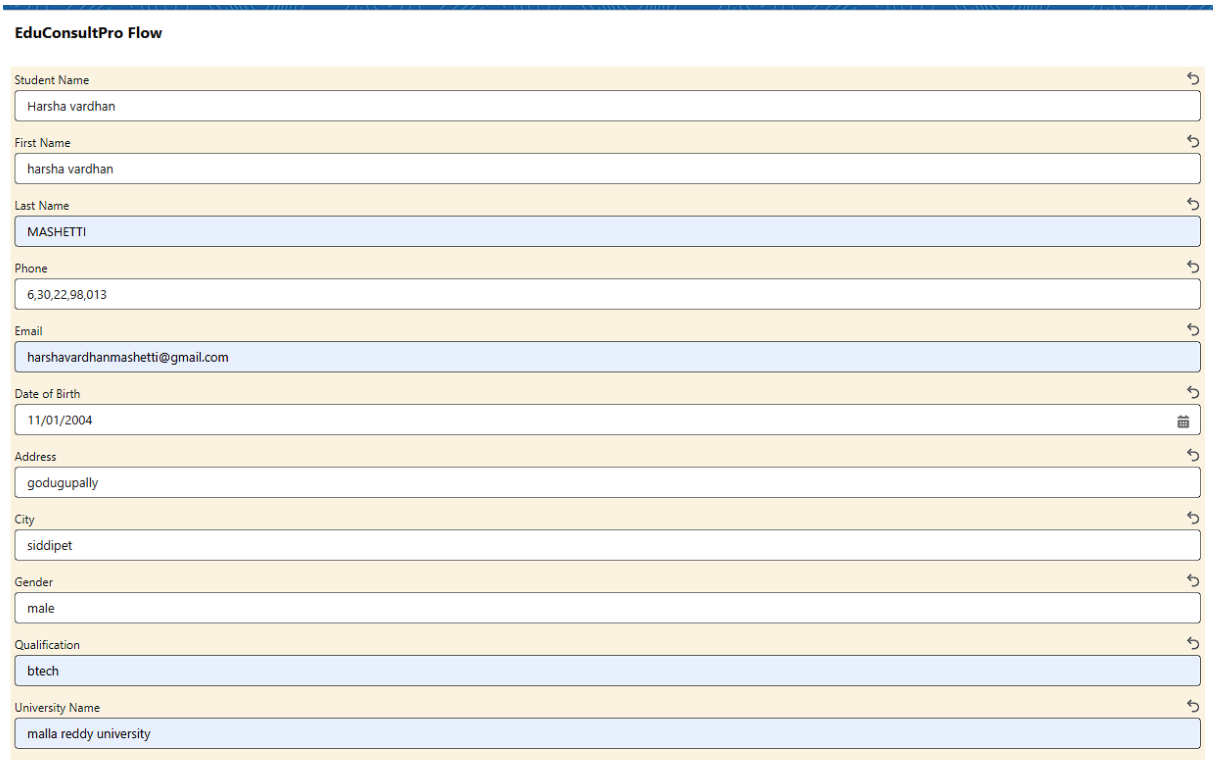
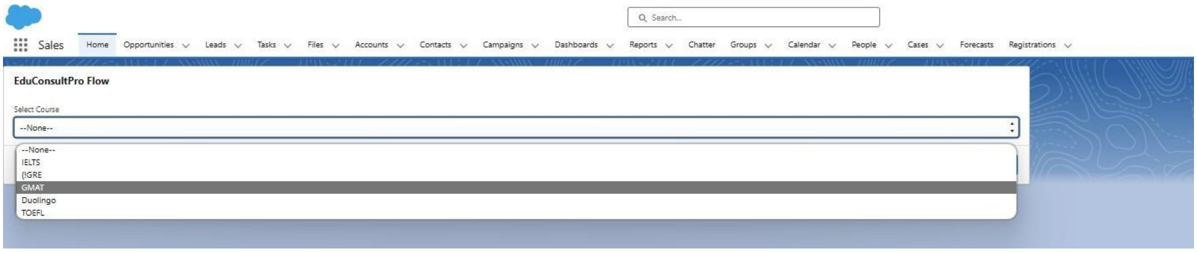
Student Information Form:



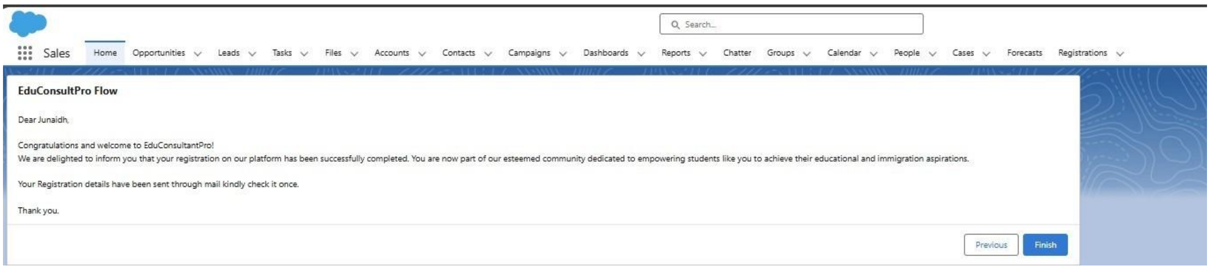
This is a Salesforce form used in an "EduConsultPro Flow" process. It's designed to capture and manage student information, such as personaldetails, educational background, and contact information. The form is typically used by educational consultancies or institutions to organize student data for processing applications, admissions, or other related services.

Course Selection:



This screenshot shows a dropdown menu in the "EduConsultPro Flow" where users can select a course from options like IELTS, GRE, GMAT, Duolingo, and TOEFL. This feature is used to specify the standardized test or course a student is interested in or applying for.

Registration Confirmation:



This screenshot displays the final step in the "EduConsultPro Flow" process, where a registration confirmation message is shown. The message congratulates the user, Junaidh, on successfully completing the registration on the EduConsultPro platform. It informs him that he is now part of the community aimed at helping students achieve their educational and immigration goals. The message also mentions that the registration details have been sent via email and advises the user to check their inbox. The process concludes with options to navigate back or finish the flow.