

EduConsultPro CRM Application: Project Documentation

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1. Project Overview

EduConsultPro Institute is a premier educational institution offering a variety of courses and consultancy services for students looking to advance their careers or studies. With a growing number of students and complex processes such as admissions, counseling, and visa consultations, the institution aims to implement a CRM system using **Salesforce** to manage these processes efficiently.

Why Salesforce?

Salesforce offers an extensive range of tools for managing business processes in a highly customizable environment.

By implementing Salesforce, EduConsultPro will improve:

- Application management
- Student consultation services
- Visa and immigration-related case management
- Communication with students through automated emails and flows

2. Goals and Objectives

Primary Goals:

- **Streamlined Admissions Process:** Automate student admission from inquiry to registration.
- **Centralized Student Management:** Keep track of all student-related information, such as courses they are interested in, visa applications, and consultations.
- **Enhanced Case Management:** Track student inquiries related to immigration and visa applications using Salesforce's case management functionality.
- **Automated Email Communication:** Automatically send emails to students at critical stages such as registration completion, appointment confirmations, etc.
- **Improved User Experience:** Provide admissions staff and consultants with an easy-to-use interface for managing student information and appointments.

Objectives:

- Build custom objects for managing student records, appointments, consultations, and registration details.
- Configure automation such as flows, approval processes, and email alerts.
- Implement security and access control for different user profiles (Consultants, Administrators).
- Develop a detailed reporting dashboard for tracking application statuses and student engagement.

3. System Architecture

Components Overview:

1. **Student Object:** Stores student information like name, email, and details about courses and consultations.
2. **Registration Object:** Stores course registration details, linked to students and courses.
3. **Appointment Object:** Manages student appointments with consultants for course guidance, visa applications, etc.
4. **Case Object:** Handles visa or immigration queries raised by students.
5. **Consultant Object:** Stores information about the consultants who provide student advisory services.
6. **Approval Process:** Handles approval workflows for appointments made by students.
7. **Flows:** Screen and record-triggered flows to handle various steps in the admission and consultation processes.

4. Key Features

Objects and Relationships:

- **Student ↔ Registration:** One-to-Many Relationship (One student can have multiple registrations).
- **Appointment ↔ Student:** Lookup Relationship.
- **Consultant ↔ Appointment:** Lookup Relationship.
- **Case ↔ Student:** Lookup Relationship (For visa or immigration-related queries).

Business Processes:

1. Student Admission Process:

- Collect basic student info.
- Allow students to choose their course.
- Register the student and send an automated welcome email.

2. Appointment Booking:

- Students can book appointments with consultants.
- The approval process ensures that consultants approve or reject the appointment requests.

3. Case Management:

- Students can raise immigration or visa-related cases.
- Staff can manage and resolve cases effectively, tracking status and priority.

Automation:

- **Flows:** Used for capturing student information, course selection, and booking appointments.
- **Approval Process:** For consultant approval on student appointments.
- **Email Alerts:** Triggered at key steps such as registration, appointment confirmations, and approvals.

User Interface:

- **Tabs:**

- **Students:** Display all student records.
- **Registrations:** Display all course registration details.
- **Consultants:** Manage consultant records.
- **Appointments:** Show all student-consultant appointments.
- **Cases:** Manage student queries related to visa and immigration.
- **Reports:** View dashboards for tracking admissions and consultation performance.

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- **Pages:**

- **Home Page:** Overview of critical activities such as upcoming appointments, open cases, and pending approvals.

5. Detailed Implementation

Objects and Fields:

- **Student Object:**
 - **Name:** Text
 - **Email:** Email
 - **Phone:** Phone
 - **Courses Interested:** Multi-select Picklist
- **Registration Object:**
 - **Student Name:** Lookup (Student)
 - **Course Name:** Picklist (IELTS, GRE, GMAT, etc.)
 - **Registration Date:** Date
 - **Status:** Picklist (Registered, Pending, Completed)
- **Appointment Object:**
 - **Student Name:** Lookup (Student)
 - **Consultant Name:** Lookup (Consultant)
 - **Appointment Date & Time:** Date/Time
 - **Purpose/Topic:** Text
 - **Status:** Picklist (Pending, Approved, Rejected)
- **Case Object:**
 - **Student Name:** Lookup (Student)
 - **Case Type:** Picklist (Visa, Immigration)
 - **Case Description:** Long Text
 - **Status:** Picklist (Open, In-Progress, Closed)

Flows:

1. **Student Admission Flow:** Screen flow to capture student info and course selection, followed by record creation and sending emails.
2. **Appointment Booking Flow:** Screen flow that allows existing students to book an appointment with a consultant.
3. **Case Creation Flow:** Screen flow for students to log visa or immigration-related queries.

Approval Process:

- **Appointment Approval Process:**
 - Automatically assigns the appointment approval to the student's consultant.
 - If approved, an email is sent to confirm the appointment.
 - If rejected, an email is sent with details for rescheduling.

Email Templates:

1. **Registration Confirmation:** Sent after a successful student registration.

2. **Appointment Confirmation:** Sent after an appointment is booked and approved.
3. **Case Updates:** Sent to students when a case is updated (Open, In-Progress, Closed).

Security and Profiles:

- **System Administrator:** Full access to all objects and settings.
- **Consultant:** Can view and update student records, approve appointments, and manage cases.
- **Admissions Officer:** Can view and manage student registrations, but cannot approve appointments.

6. Testing Strategy

Test Scenarios:

1. **Student Registration:** Test if a new student can be registered and if they receive a confirmation email.
2. **Appointment Booking:** Ensure students can book appointments and the approval process works as expected.
3. **Case Logging:** Ensure students can log cases and that staff can manage them.
4. **Email Alerts:** Verify that emails are sent at the appropriate stages.
5. **Reports:** Check the dashboards for admissions and consultation metrics.

User Testing:

- Have admissions staff and consultants run through the entire process to ensure usability.
- Ensure that security settings are correct and that users only have access to what they need.

Error Handling:

- Input validation in forms (e.g., ensure valid email addresses).
- Graceful error messages in case of failed record creation or missing information.

7. Conclusion

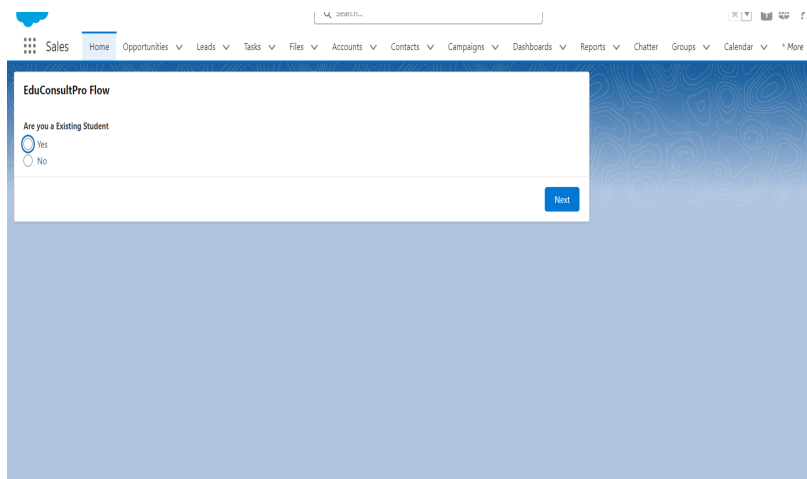
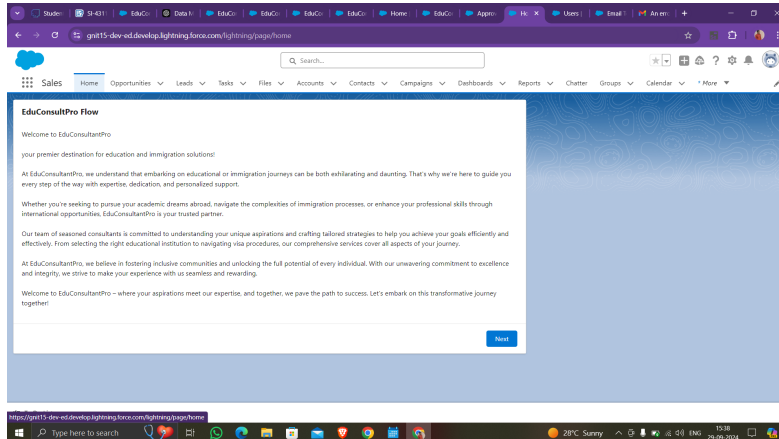
This Salesforce CRM application for EduConsultPro provides a comprehensive solution to manage the student admission process, consultations, and immigration/visa queries. By automating key processes and centralizing student information, EduConsultPro will be able to handle growing volumes of inquiries and applications efficiently, improving both staff productivity and student satisfaction.

8. Appendices

Glossary of Terms:

- **Flow:** Automation in Salesforce to guide users through a set of screens or steps.
- **Object:** A table in Salesforce where data is stored (e.g., Student, Appointment).
- **Record Triggered Flow:** A flow that starts when a record is created or updated.
- **Email Template:** Predefined content used to send standardized email communication.

Screenshots:



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Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

EduConsultPro Flow

*Enter Student Name
kalyan Gundedi

*Enter Student Email
kalyan@gmail.com

Previous Next

To Do List

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EduConsultPro Flow

*How May I Help You
☒ Appointment
☐ Case

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EduConsultPro Flow

Appointment Date/Time

Date: 29/09/2024 Time: 12:00 pm

Purpose/Topic
training

Notes
training

Select Consultant
Phani Verma

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EduConsultPro Flow

Consultant Name : Tarakesh Kolla,

Date & Time : 29/09/2024, 12:00 pm,

Notes : training,

Finish

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EduConsultPro Flow

Are you a Existing Student

☐ Yes

☒ No

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EduConsultPro Flow

Student Name

* First Name

Last Name

* Email

Phone

Date of Birth

Gender

University Name

Qualification

To Do List

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EduConsultPro Flow

Select Course

--None--

--None--

IELTS

GRE

GMAT

Duolingo

TOEFL

To Do List

Type here to search

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