

A CRM Application to Manage the Services offered by an Institution

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Abstract

The **EduConsultPro** Institute is one of these leading educational institutes that annually presents a greater quantity of various courses and programs for an increasing quantity of prospective students. The service standards need effective management in admissions management, student inquiries, and expert consulting to keep them in a high position. This project will entail the design and implementation of a comprehensive CRM application using Salesforce to support this process better and improve the experience of students and admissions staff alike. The solution will consist of features in admission application management, consulting services management, and immigration case management, among others. *Admission Application Management* will enable prospects to make applications online and for the admission staff to trace and scrutinize the applications through automated notifications. *Consulting Services Management* will help students create their request for expert advice, while consultants can schedule and manage their appointments with much ease. The *Immigration Case Management* will provide information on immigration- related questions and cases. Some features of this system include automated workflows, email notifications, comprehensive dashboards, and collaboration tools. **EduConsultPro** Institute has now revamped pages for their prospective students, which are smooth, transparent, and easily navigated, all made possible through the use of Salesforce CRM. The sole concept, however, is developing operational efficiencies with an increased throughput in the admission process through consulting services. Now, this project aligns not just with things up front but provides a nice platform for scalable and future-fit growth.

INDEX PAGE

Topic	Page no
1. Title	1
2. Abstract	2
3. Introduction	4
4. Create Objects from Spreadsheet	5
5. Create a ScreenFlow for Student Admission Application process	8
6. Create Users	10
7. Create an Approval Process for Property Object	11
8. Create a Record Triggered Flow	13
9. Create a ScreenFlow for Existing Student to Book an Appointment	14
10. Create a ScreenFlow to Combine all the flows at one place	16
11. Create a lightning app page	18
12. Execution Screenshots	19

INTRODUCTION

EduConsultPro Institute, a prestigious educational establishment, is committed to improving the management of its admission processes, consulting services, and immigration case handling. As the institute experiences a rise in student applications and service requests, it recognizes the need for a more efficient and integrated solution to address these challenges.

To enhance operational efficiency and provide a seamless experience for both prospective students and admissions staff, EduConsultPro Institute is turning to Salesforce CRM. This initiative will streamline various processes, including the handling of admission applications, consulting requests, and immigration cases, all within a single, cohesive CRM platform.

The project will involve:

- **Developing a user-friendly admission application system** that allows prospective students to apply online, with automated notifications and detailed reporting for admissions staff.
- **Creating an efficient approval workflow** for consulting requests, including automated email alerts and a streamlined submission process.
- **Managing consulting services** by enabling students to request consultations, schedule appointments, and track service statuses within Salesforce.
- **Handling immigration cases** by allowing students to initiate cases through multiple channels, manage documents, and track case progress with integrated tools.

Include the likes of setup of Salesforce objects, development of custom flows, designing for unified app pages, and more in lightning. These changes should be targeted at bringing a clearer and more smooth experience for the concerned users who are going through the processes of admission and consultation.

Task1

Create Objects from Spreadsheet

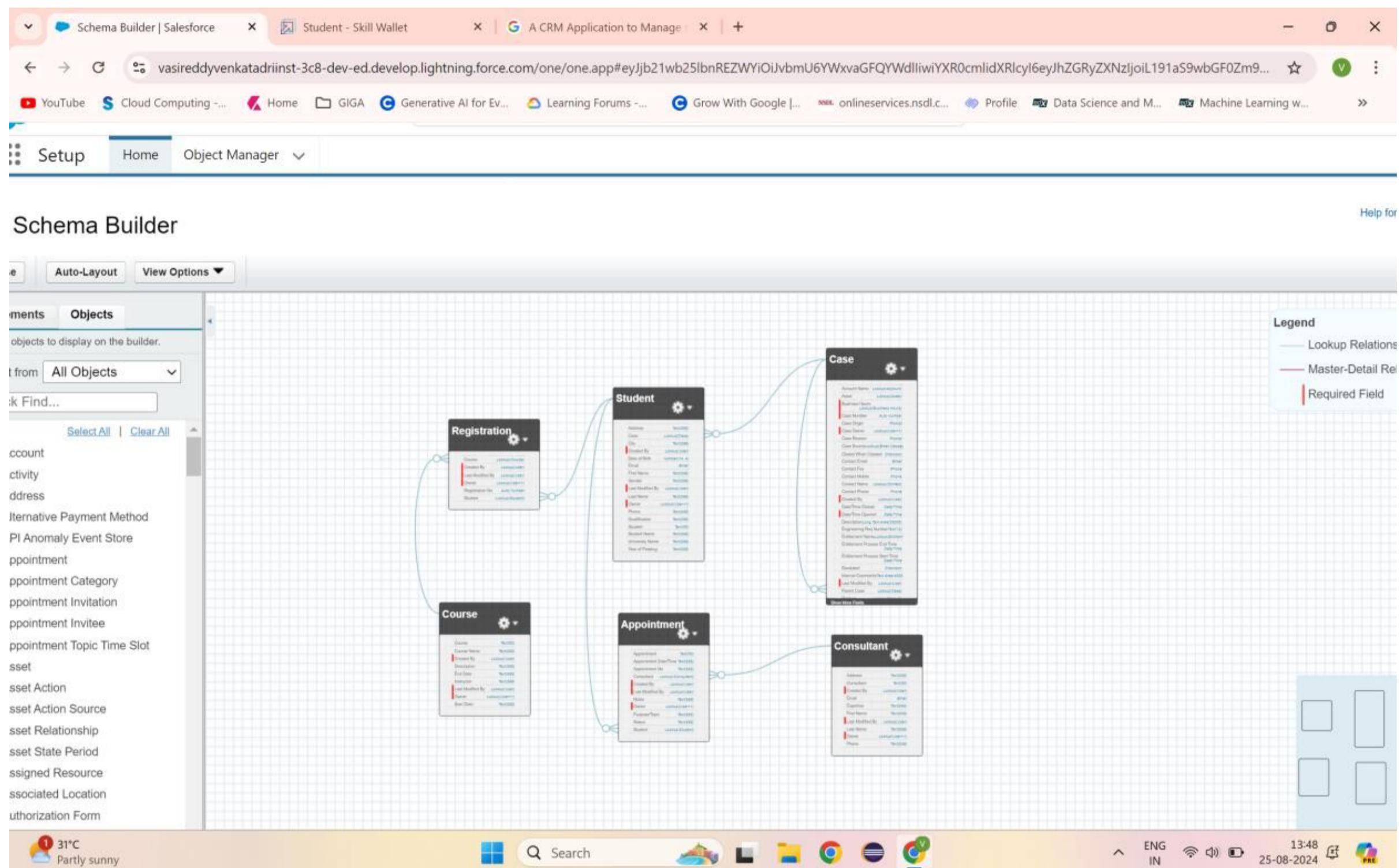
The outcome is enhanced services management at EduConsultPro Institute for which Salesforce functionality is leveraged to enable creation of objects directly from the spreadsheets. This will make it easier to integrate existing data in Salesforce and effectively manage the same for several institutional requirements.

Many objects were done using the spreadsheets given by the institution to solve the assignment. Course, Consultant, and Student, and Appointment are the objects designed, one representing a critical working of an institution. The lookup relationships between the said objects will ensure the design integrity and smooth navigation of data. At this point, lookup relationships were created between Appointment and Student and Appointment and Consultant.

A new Registration object was created to hold student and course information and set up the lookup relationship on either an immigration or visa application regarding student queries between Student and Case.

It was set up to model the data regarding the requirement of the institution. For every new object, after that, tabs were created that would act as easy accesses. The Case object further customized Specified values entered for the "Type" field were Immigration and Visa Application those for "Status" were Open and In-progress. A new Lightning application, EduConsultPro, was developed that aggregates all these elements: home, students, courses, advisers, appointments, registrations, and cases. The interface was largely optimized for user experience between the system administrator and staff members, so it guaranteed proficient, effective, and transparent administration of all aspects of service within the Salesforce instance at the EduConsultPro Institute.

Screenshots:



Lookup relationship among Objects

The screenshot shows the Lightning App Builder interface. On the left, there's a sidebar with 'Navigation Items' selected. The main area has two sections: 'Available Items' on the left containing a list of items like Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, etc., and 'Selected Items' on the right containing a list of items that have been added to the app: Registrations, Student, Course, Cases, Appointment, and Consultant. Arrows indicate the movement of items from the available list to the selected list. The status bar at the bottom shows it's 13:52 on 25-08-2024.

Adding items to EduConsultPro

The screenshot shows the 'Lightning Experience App Manager' interface. On the left, a sidebar lists various setup categories like 'Setup Home', 'Service Setup Assistant', and 'ADMINISTRATION'. The main area displays a table of installed apps, with the 10th row ('EduConsultPro') currently selected. The table columns include 'App Name', 'Developer Name', 'Description', 'Last Modified Date', 'App Status', and 'Visibility'. The 'EduConsultPro' app is developed by 'EduConsultPro' and last modified on 23/08/2024 at 6:10 am.

App Name ↑	Developer Name	Description	Last Modified D...	App ...	Visi...
1 All Tabs	AllTabSet		22/08/2024, 9:45 pm	Classic	▼
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/08/2024, 9:45 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	22/08/2024, 9:45 pm	Classic	✓
4 Automation	FlowsApp	Automate business processes and repetitive tasks.	22/08/2024, 9:49 pm	Lightning	✓
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	22/08/2024, 9:47 pm	Lightning	✓
6 Community	Community	Salesforce CRM Communities	22/08/2024, 9:45 pm	Classic	✓
7 Content	Content	Salesforce CRM Content	22/08/2024, 9:45 pm	Classic	✓
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	22/08/2024, 9:45 pm	Lightning	✓
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/08/2024, 9:45 pm	Lightning	✓
10 EduConsultPro	EduConsultPro		23/08/2024, 6:10 am	Lightning	✓
11 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/08/2024, 9:45 pm	Lightning	✓
12 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	22/08/2024, 9:45 pm	Classic	✓
13 Platform	Platform	The fundamental Lightning Platform	22/08/2024, 9:45 pm	Classic	✓
14 Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2024, 9:45 pm	Lightning	✓
15 Sales	Sales	The world's most popular sales force automation (SFA) solution	22/08/2024, 9:45 pm	Classic	✓

EduConsultPro Lightning App

The screenshot shows the 'Case' object configuration page under 'Object Manager'. The left sidebar lists various configuration options like 'Fields & Relationships', 'Details', and 'Inactive Values'. The main area contains sections for 'Field Dependencies', 'Validation Rules', and 'Case Type Picklist Values'. The 'Case Type Picklist Values' section displays a table of values, with the last few rows added by Vedasri Kurra on 23/08/2024 at 6:06 am.

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Mechanical	Mechanical	<input type="checkbox"/>	Assigned dynamically	Vedasri Kurra, 22/08/2024, 9:45 pm
Edit Del Deactivate	Electrical	Electrical	<input type="checkbox"/>	Assigned dynamically	Vedasri Kurra, 22/08/2024, 9:45 pm
Edit Del Deactivate	Electronic	Electronic	<input type="checkbox"/>	Assigned dynamically	Vedasri Kurra, 22/08/2024, 9:45 pm
Edit Del Deactivate	Structural	Structural	<input type="checkbox"/>	Assigned dynamically	Vedasri Kurra, 22/08/2024, 9:45 pm
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	Assigned dynamically	Vedasri Kurra, 22/08/2024, 9:45 pm
Edit Del Deactivate	Immigration	Immigration	<input type="checkbox"/>	Assigned dynamically	Vedasri Kurra, 23/08/2024, 6:06 am
Edit Del Deactivate	Visa Application	Visa Application	<input type="checkbox"/>	Assigned dynamically	Vedasri Kurra, 23/08/2024, 6:06 am

Configuring the Case Object

Task2

Create a ScreenFlow for Student Admission Application process

The EduConsultPro Student Flow simplifies the registration process for students by creating a more user-friendly application. I added the Screen element, represented as a "**Student Info**," which was there to carry all the information that pertained to the student. Therefore, I created a record variable known as **StudentRecordRes** to view the fields from the student object and present a verylight experience when getting data.

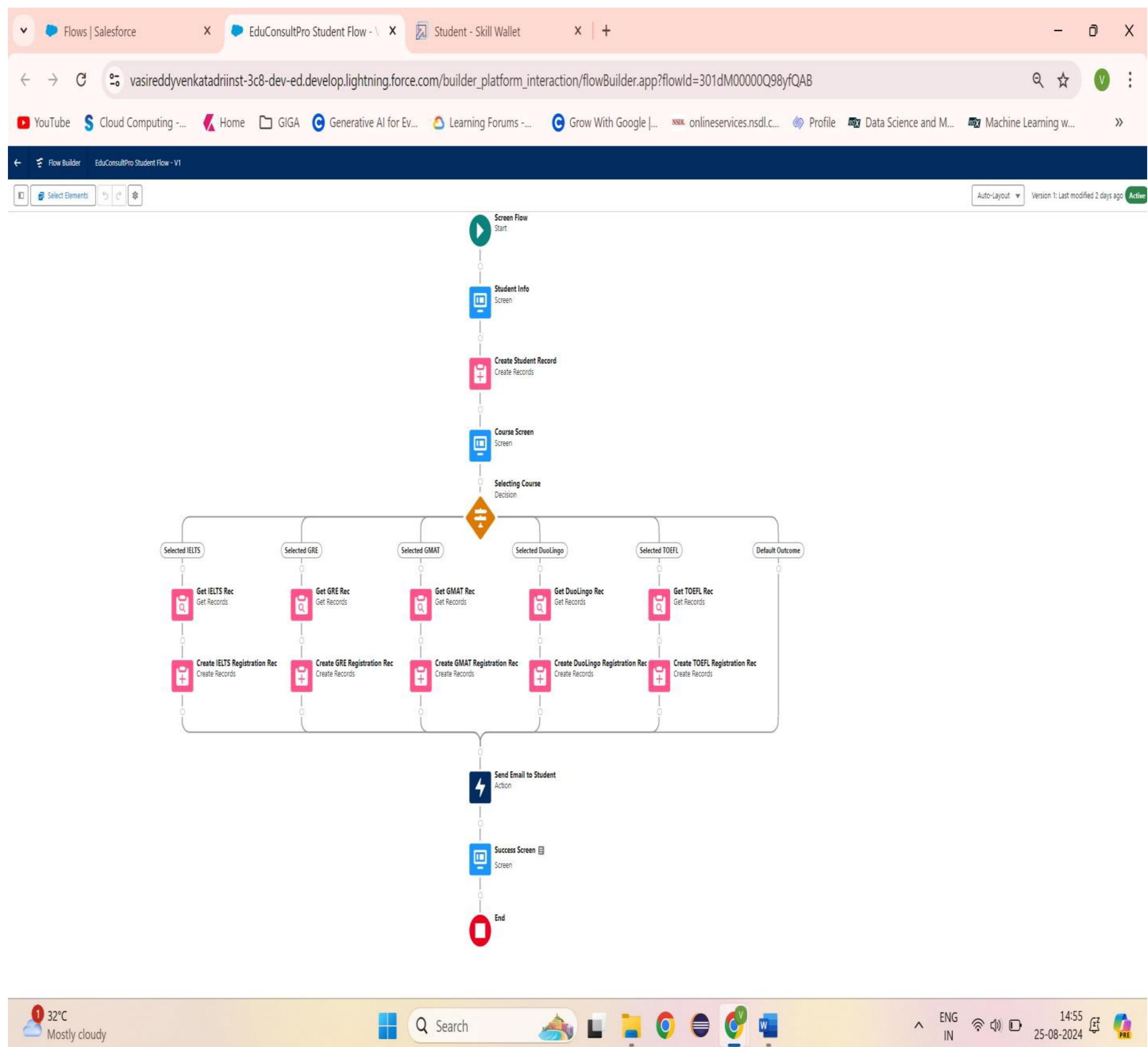
Next, I developed a Create element named "**Create Student Record**" to enable saving the student record input to the Salesforce database. Then I included a "**Course Screen**" by including a second Screen element. The primary choice found in the screen is a picklist named "**Select Course**". The course options thatmay be selected are *IELTS, GRE, GMAT, Duolingo, and TOEFL*.

Added a Decision element known as "**Selecting Course**" to manage course selection. This checks the course selected and then directs the flow of action regarding the selection. Based on the selection made, under the condition of the choice, a Get Record element gets the related course record from the "**Course**"object so that registration is done correctly.

After collecting the course data that was needed, a Create Records element was leveraged to make a registration record in the "**Registration**" object, associatingthe selected course with all the information that student gave to me. I then madeText Template Resources for the body and subject of the email to add the message that would be sent to the student ensuring that they had properly registered and sought to join the platform.

I then added an Action element titled "**Send Email to Student**" for sending this email—including the capability to fill in the email with provided student details any time the process is run. To exit the process system, I added an Screen element titled "**Success Screen**" and then added a message, "Registration has been completed successfully," with advice to students to check their emails fordetails. This flow will be named hence: "**EduConsultPro Student Flow**."

Screenshot:



EduConsultPro Student Flow

Task3

Create Users

Created new user in Salesforce by navigating to Setup → Administrative → Users → New User. Entered "Consultant" for the second name and entered "Salesforce Platform" as the license type. I applied the profile "Standard PlatformUser," checked all required fields for data, and saved the record of the new user.

Configured user settings: Browse to Setup → Administration → Users → Edit the user profile Scrolled down to the Approver Settings section, Selected "Consultant" in the Manager Field, At the bottom of the screen, click Save.

The screenshot shows the Salesforce 'All Users' page under the 'Users' tab in the setup menu. The page lists several users with their details:

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00ddm00000akr2zuab.tvwlmfrbswy@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	Consultant	cons	vedasrikurradprofile@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
Edit	Kurra, Vedasri	VKurr	vedasrikurradproject@gmail.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	integ	integration@00ddm00000akr2zuab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00ddm00000akr2zuab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

User

The screenshot shows the 'Approver Settings' page under the 'Users' tab in the setup menu. The 'Manager' field is set to 'Consultant'. The 'Receive Approval Request Emails' dropdown is set to 'Only if I am an approver'.

Configure the User Settings

Task4

Create an Approval Process for Property Object

Created email template in Salesforce. From Setup, I input "Templates" in the Quick Find box and clicked on "Lightning Email Templates", and clicked the toggle to on. Opened the App Launcher, searched for "Email Templates" from the search box, and saved. Created a new folder with the desired name. Created a new email Template and selected the new created folder. The specified text got pasted into the HTML Value to create this, in my case, "SubmissionTemplate" Designed two more email templates for approving and rejecting requests, ditto the first one.

Earlier, I did set up the approval process. I went to Setup and typed "Approval" in the Quick Find box, and clicked on "Approval Processes." I selected to manage approval processes for "Appointment" and clicked "Create New Approval Process" using the Jump Start Wizard. I named the process "Appointment Approval" and under the approver settings, I used the setting "Option Automatically assign an approver using a standard or custom hierarchy field" of "Manager." I set the "Next Automated Approver Determined By" field to "Manager."

Made the following changes to the Record Editability Properties: Prepend "Administrator OR the currently assigned approver" to the list Saved the process and checked out the form Made a new Field Update under the Initial Submission Actions with Name "Submitted" and configured it to make the update to the field "Appointment: Status" with "Pending"

Also created a new Email Alert type "Submission Email Alert," auto-populate the Unique Name, selected the "Submission Template" Email Template, selected the recipient type to the user's Name. Repeated that for the Final Approval and Final Rejection actions and set those two up the same way.

Screenshots:

The screenshot shows the Salesforce Email Templates page. The top navigation bar includes tabs for Sales, Home, Dashboards, Registrations, Opportunities, Leads, Tasks, Files, and More. A search bar at the top right says "Search...". Below the navigation is a sidebar with sections for Email Templates, Recent, Created by Me, Private Email Templates, Public Email Templates, All Email Templates, Folders, All Folders, Created by Me, and Shared with Me. The main content area displays a table of email templates with columns for Email Template Name, Description, Folder, Last Modified By, and Last Modified Date. The table lists four templates: "Email template" (Created by Me), "Rejection of Request" (Created by Me), "Approval of Request" (Created by Me), and "Submission Template" (Created by Me). The "Email template" was modified by Vedasri Kurra on 25/8/2024, 3:16 pm.

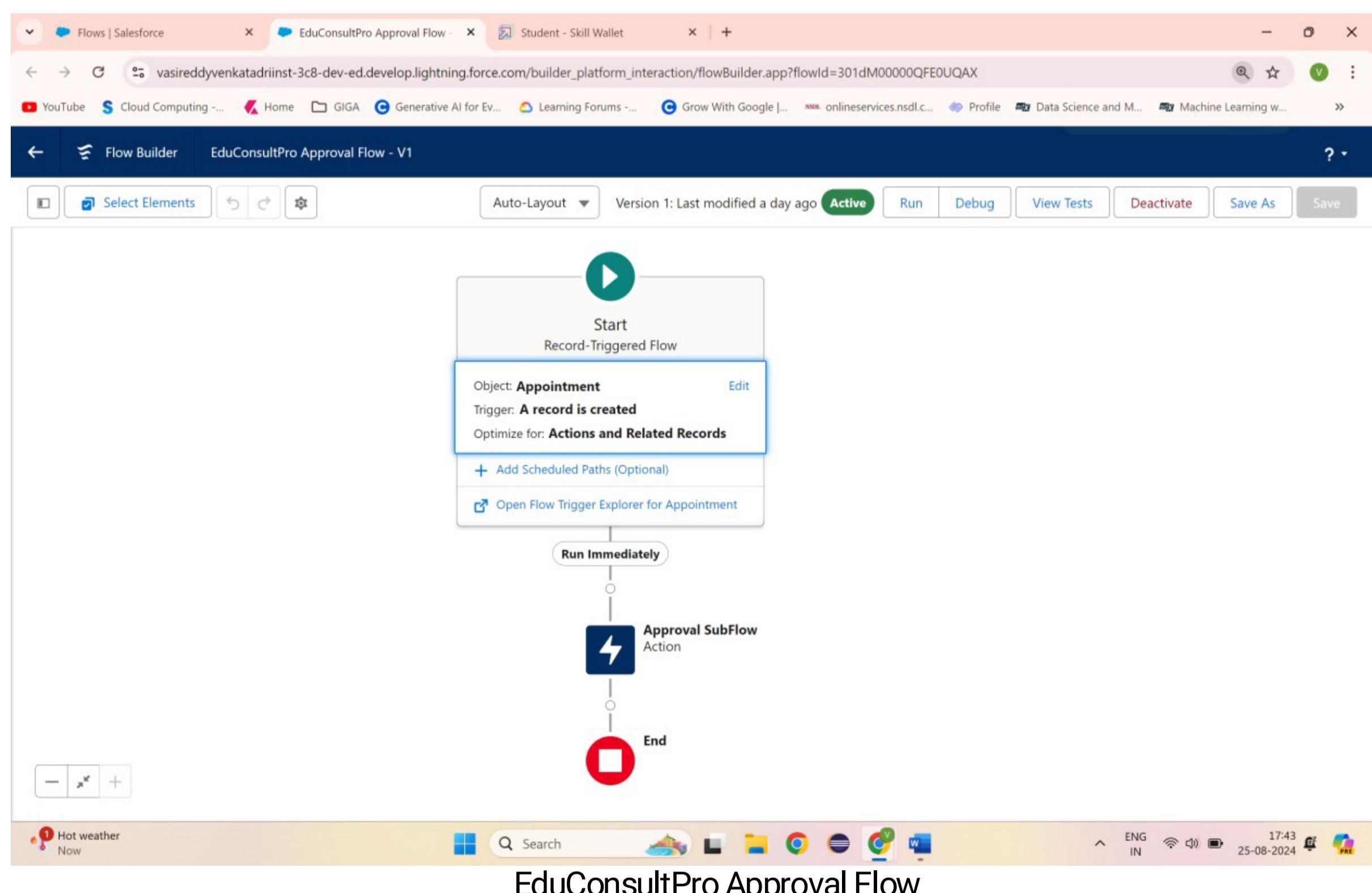
The screenshot shows the Approval Processes page in the Salesforce Setup. The top navigation bar includes tabs for Setup, Home, and Object Manager. A search bar at the top right says "Search Setup". The left sidebar has sections for Data (Mass Transfer Approval Requests) and Process Automation (Approval Processes). The Approval Processes section is selected. The main content area shows the "Appointment Approval" process detail. The "Process Definition Detail" section includes fields for Process Name (Appointment Approval), Unique Name (Appointment_Approval), Description, Entry Criteria, Record Editability (Administrator OR Current Approver), Approval Assignment Email Template, Initial Submitters (Appointment Owner), Created By (Vedasri Kurra, 24/08/2024, 12:04 pm), Active (unchecked), Next Automated Approver Determined By (Manager of Record Submitter), Allow Submitters to Recall Approval Requests (unchecked), and Modified By (Vedasri Kurra, 25/08/2024, 3:17 pm). The "Initial Submission Actions" section lists various actions like Record Lock, Field Update, Email Alert, and Submission Email Alert. The bottom navigation bar includes tabs for Home, Object Manager, and more.

Task5

Create a Record Triggered Flow

Created a record-triggered flow in Salesforce for appointment approvals. Set the flow trigger to 'When a record is created' on an appointment record and added an action element that would submit the record for approval. Label this Action element as "Approval SubFlow" and set RecordId to "{!\$Record.Id}". At this point, the flow was saved with the label "EduConsultPro Approval Flow" and activated.

Screenshot:



Task6

Create a ScreenFlow for Existing Student to Book an Appointment

Configured an end-to-end flow in Salesforce for student appointments and casesmanagement.

Added a Screen element called "Get Student Info" to collect the student's nameand email, and added a GET Record element to retrieve student details depending on the name and email collected.

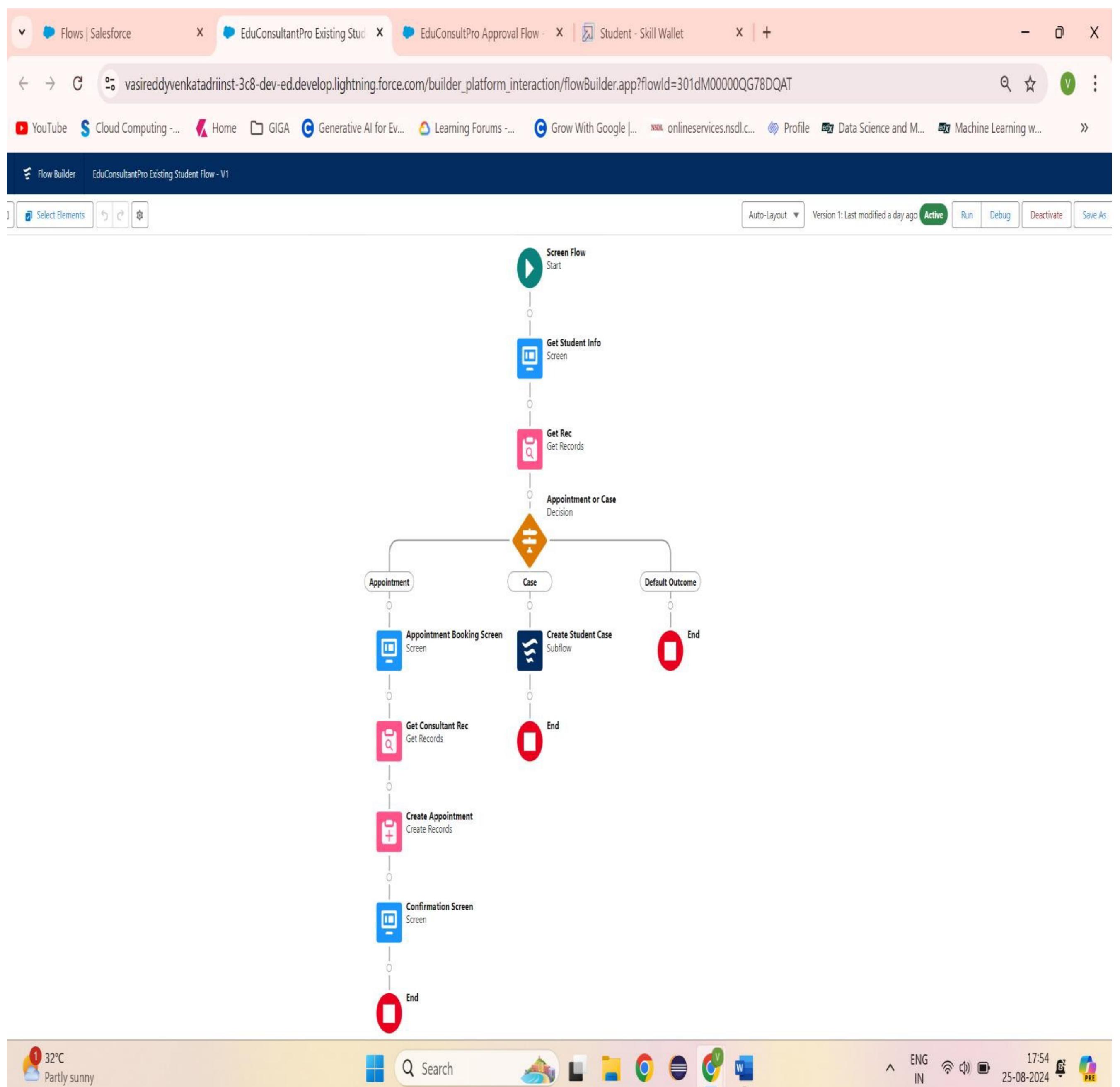
Added a Decision element to route between "Appointment" and "Case" depending upon the student's wishes. Added a Screen element labeled "Appointment Booking Screen" to gather details for appointments in case an appointment has been booked.

Inserted a GET Record element to obtain consultant details based on the selected name of the consultant. Applied a Create Records element to create a new appointment record with appropriate details.

Added a Screen element and named it "Confirmation Screen" to let the studentsee details of the appointment confirmation.

Added a Subflow element for case management and named it "Create Student Case" for creation of a case. Finally, save the flow as "EduConsultantPro ExistingStudent Flow" and prepare for deployment.

Screenshot :



EduConsultantPro Existing Student Flow

Task7

Create a ScreenFlow to Combine all the flows at one place

A new Screen Element in the flow was added labelled as "Welcome Screen". Inside this screen, a Display Text component was added and was labelled as "SuccessMessage."

Entered the given text into the Resource Picker box so that the welcome message by EduConsultantPro describes the services and support it provided. Added another Screen Element following the Welcome Screen, labeled "Existing or New Student Confirmation Screen."

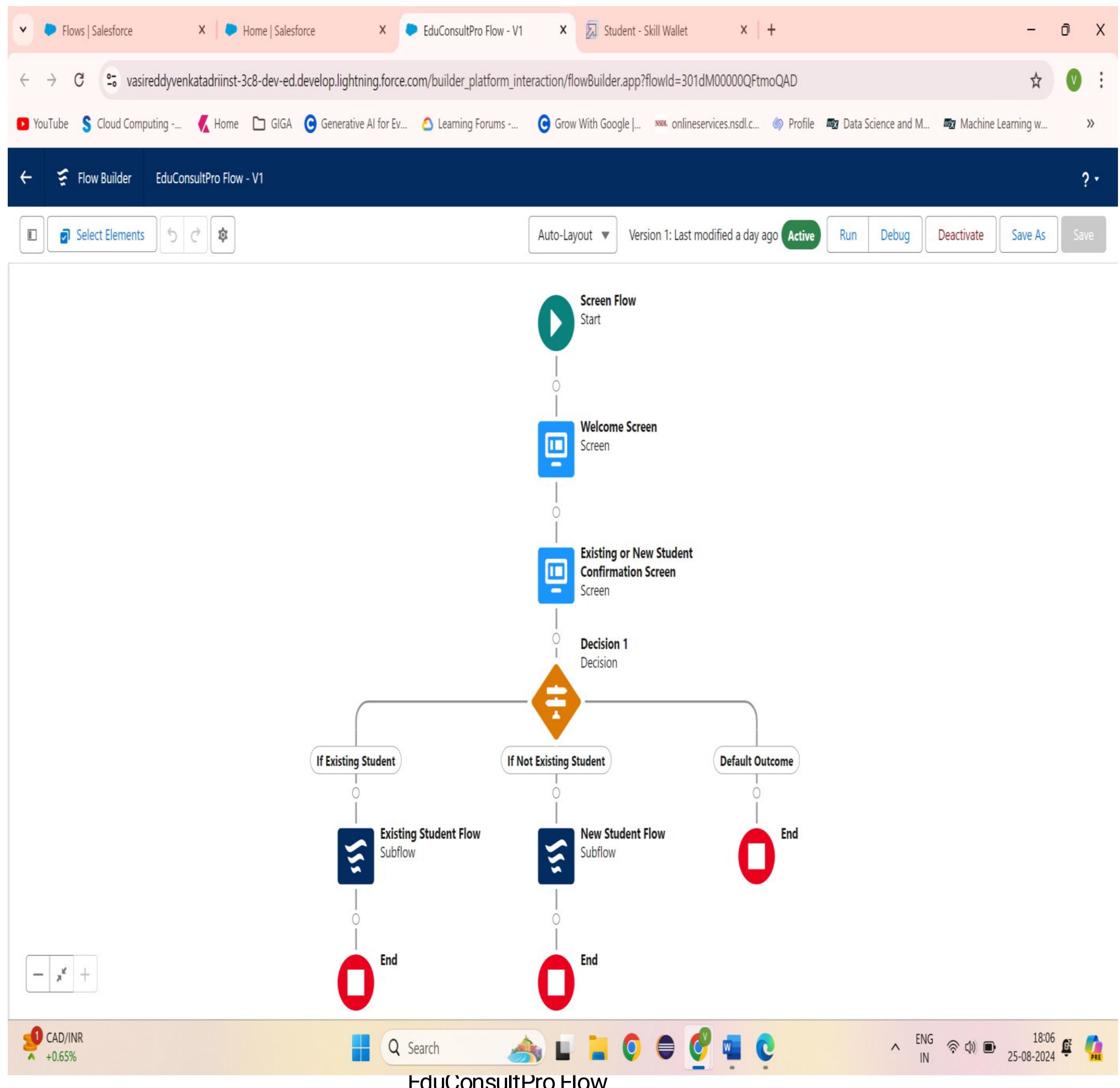
Added a Radio Button component with the label "Are you an Existing Student?" Created two choices: "Yes" and "No." Then added an Action Element of type Decision and named it "Decision 1," placing it next to the Existing or New Student Confirmation Screen. Set up the decision criteria with the outcome labeled "If Existing Student." The condition will be when the resource `{!Are_you_a_Existing_Student}` is equal to the value `{!Yes}`. Added the second outcome for "No."

Inserted a Subflow Element in the "If Existing Student" path and selected "EduConsultantPro Existing Student Flow" and labelled it as "Existing Student Flow." Saved the flow under the name "EduConsultantPro Existing Student Flow."

Inserted another Subflow Element in the "If Not an Existing Student" path, selecting the "EduConsultantPro Student Flow" and labeling it "New Student Flow." Saved this flow with the name "EduConsultPro Flow."

Finalized by saving the entire flow, naming it "EduConsultPro Flow."

Screenshot:



Task8

Create a lightning app page

Created and configured a Lightning App Page named "EduConsultPro Home Page" using the Standard Home Page template. Placed the Flow component in the top-right region and incorporated the "EduConsultantPro Flow." Activated the page and assigned it to the Sales app and the System Administrator profile, ensuring it was available for the designated users.

Screenshots:

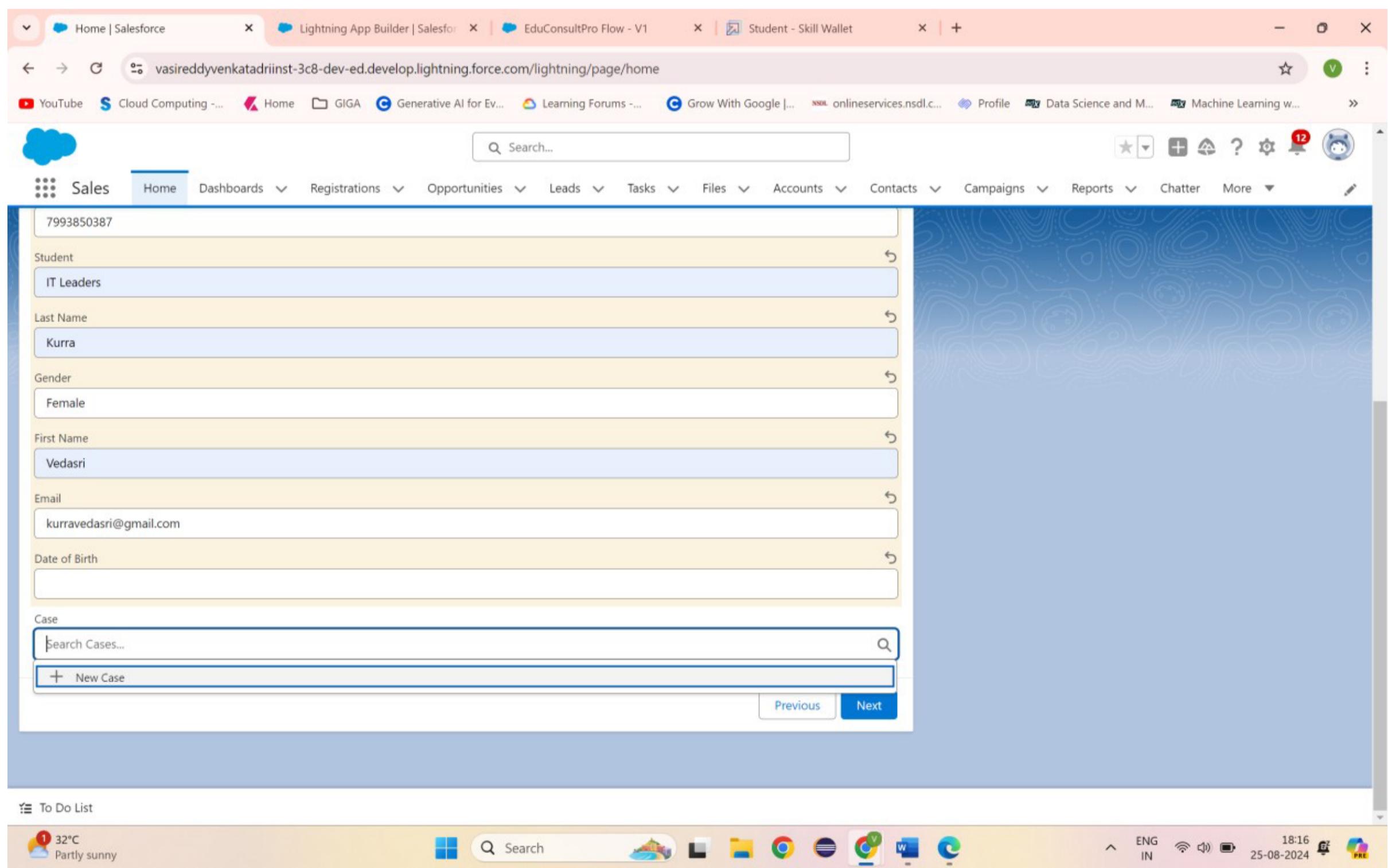
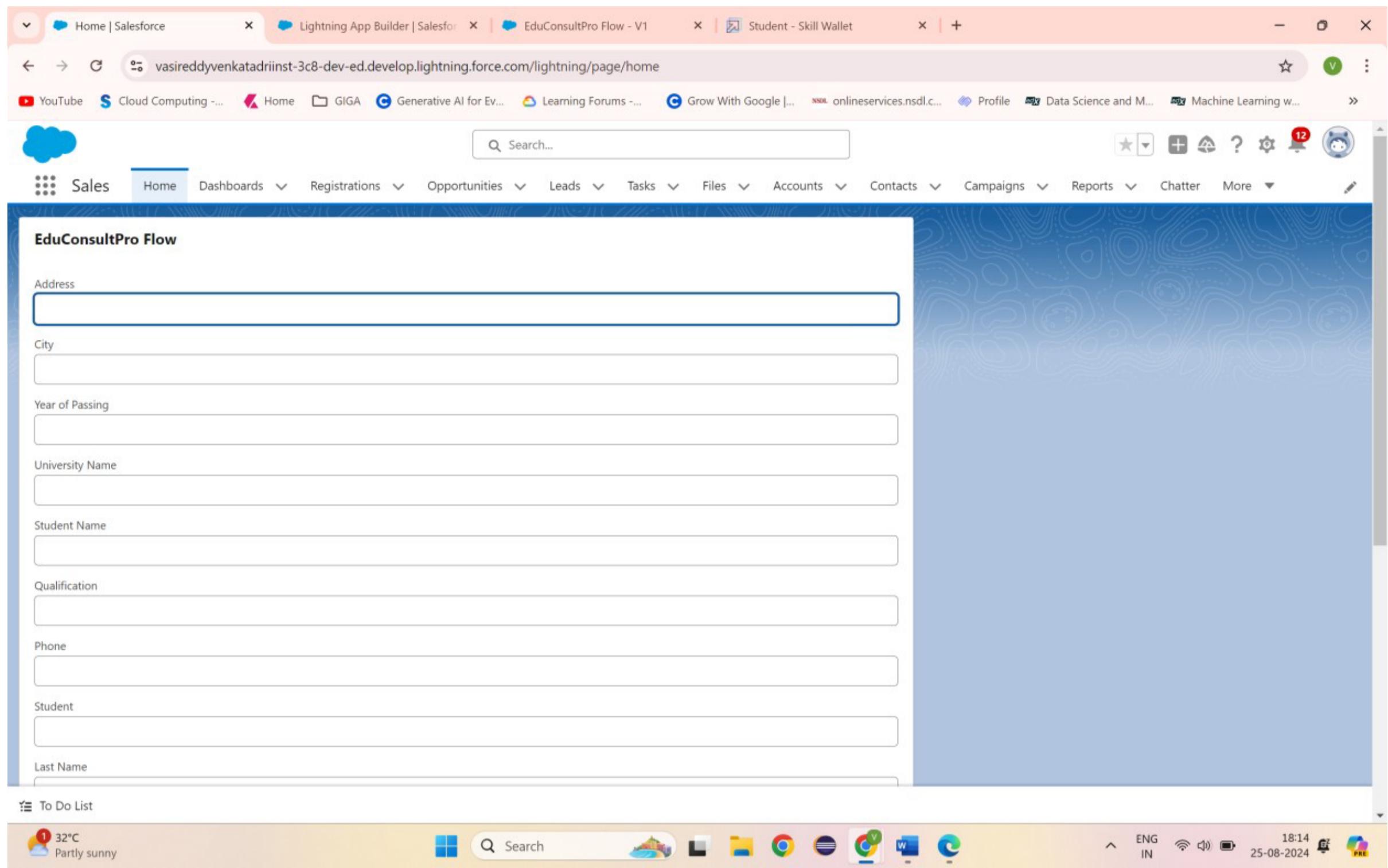
The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes tabs for Home, Object Manager, and Setup. A search bar at the top right contains the text "Search Setup". The main content area is titled "Lightning App Builder" and displays a table of "Lightning Pages". The table has columns for Action, Label, Name, Namespace Prefix, Description, Type, Created By, and Last Modified By. One row is visible, showing "Edit | Clone | Del" for "EduConsultPro Home Page", which has a name of "EduConsultPro_Home_Page", is a "Home Page", and was created by "VKurr" on 24/08/2024, 5:18 pm. The last modified date is also "24/08/2024, 5:19 pm". The bottom of the screen shows a taskbar with various icons and system status information, including the date "25-08-2024" and time "18:12".

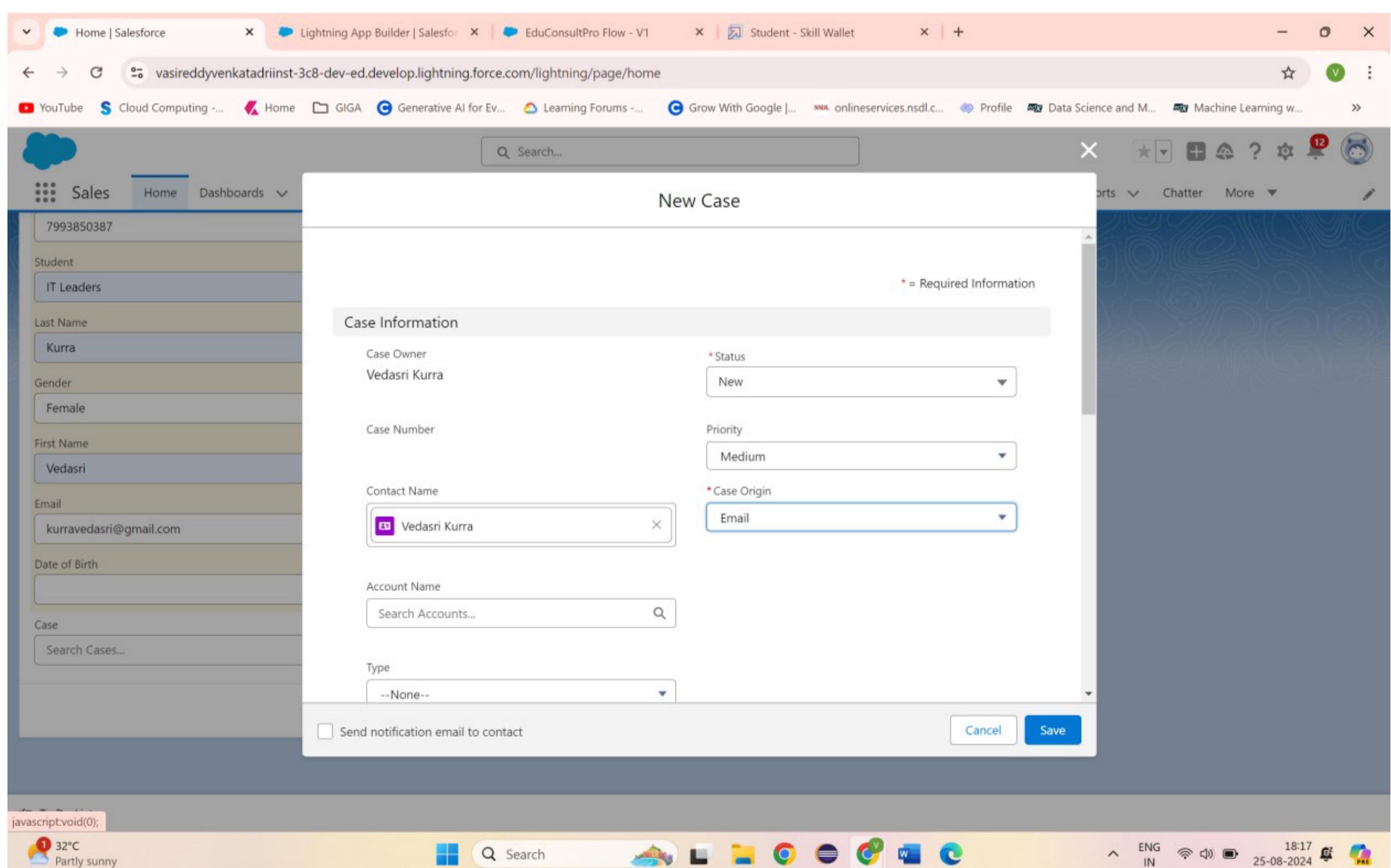
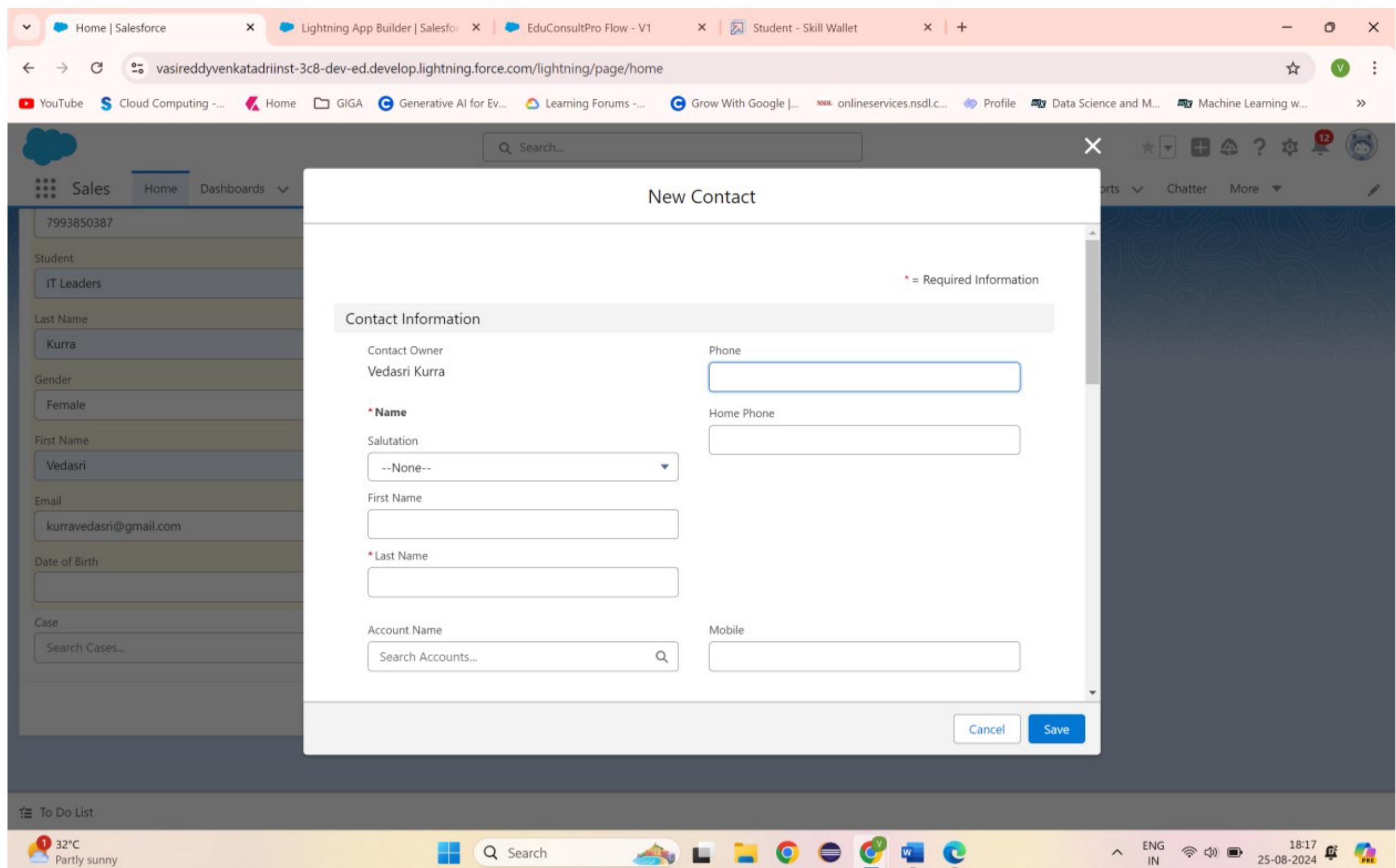
Action	Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
Edit Clone Del	EduConsultPro Home Page	EduConsultPro_Home_Page			Home Page	VKurr, 24/08/2024, 5:18 pm	VKurr, 24/08/2024, 5:19 pm

Execution Screenshots:

This screenshot shows the initial landing page of the EduConsultPro Flow application. The page has a blue header with the title 'EduConsultPro Flow'. Below the header, there is a welcome message: 'Welcome to EduConsultantPro' and 'your premier destination for education and immigration solutions!'. The message continues to explain the service's mission to provide guidance and support for educational and immigration journeys. At the bottom of the main content area is a 'Next' button. The top navigation bar includes links for Sales, Home, Dashboards, Registrations, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Reports, Chatter, and More. A sidebar on the right lists 'Groups', 'Calendar', 'People', 'Cases', and 'Forecasts'. The bottom of the screen shows a Windows taskbar with various icons and system status information.

This screenshot shows a registration step within the EduConsultPro Flow application. The question 'Are you a Existing Student?' is displayed, with two options: 'Yes' and 'No'. The 'No' option is selected and highlighted with a blue circle. Below the question are 'Previous' and 'Next' navigation buttons. The top navigation bar and sidebar are identical to the previous screenshot, showing the Sales tab is active. The bottom of the screen shows a Windows taskbar with various icons and system status information.





The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes tabs for Home | Salesforce, Lightning App Builder | Salesforce, EduConsultPro Flow - V1, and Student - Skill Wallet. The main content area displays a form for creating a new student record. The form fields include:

- Student
- IT Leaders
- Last Name
- Kurra
- Gender
- Female
- First Name
- Vedasri
- Email
- kurravedasri@gmail.com
- Date of Birth
- Case
- 00001026

At the bottom of the form are "Previous" and "Next" buttons.

The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes tabs for Home | Salesforce, Lightning App Builder | Salesforce, EduConsultPro Flow - V1, and Student - Skill Wallet. The main content area displays a form titled "EduConsultPro Flow". The form field is labeled "Select Course" and contains the value "Duolingo". At the bottom of the form are "Previous" and "Next" buttons.

THANKYOU