A CRM Application to Manage the Services offered by an Institution

Description :

The CRM application for EduConsultPro Institute is a comprehensive tool designed to optimize admissions, student inquiries, and consulting services. As the institute expands, an efficient system becomes essential. This CRM automates application submissions, manages inquiries, and processes consulting requests on a unified platform. By capturing detailed student information and automating follow-ups and status tracking, it ensures a smooth experience for students and staff alike. Furthermore, it facilitates the management of consulting services and immigration cases, enhancing operational efficiency and service quality. Ultimately, this tailored CRM solution enables EduConsultPro Institute to focus on delivering exceptional educational experiences while upholding high standards of professionalism and care in every interaction.

Tasks :

Task-1: Creating Objects from Spreadsheet

1.1 Create the Course Object

1. **Access Object Manager:**
   - Navigate to **Setup** in Salesforce and search for **Object Manager**.
   - Select **Create Object from Spreadsheet**.
2. **Upload Spreadsheet:**
   - Download the provided **Course spreadsheet**.
   - Upload the file in Salesforce and map the fields from the spreadsheet to Salesforce fields.
   - Complete the upload to create the **Course** object.

1.2 Create Additional Objects

1. **Repeat the steps from 1.1** for the following objects:
    - **Consultant** (using **Consultant spreadsheet**)
    - **Student** (using **Student spreadsheet**)
    - **Appointment** (using **Appointment spreadsheet**)

2. Creating Relationships Among Objects

2.1 Create Lookups Between Appointment and Other Objects

1. **Appointment to Student:**
    - In **Object Manager**, select **Appointment**.
    - Navigate to **Fields & Relationships** and click **New**.
    - Choose **Lookup Relationship** and select **Student** as the related object.
    - Save the relationship.
2. **Appointment to Consultant:**
    - Repeat the process to create a **lookup relationship** between **Appointment** and **Consultant**.

2.2 Create the Registration Object and Its Relationships

1. **Create Registration Object:**
    - Follow the object creation process using the **Registration spreadsheet** or manually create it in **Object Manager**.
2. **Create Lookups:**
    - Create **lookup relationships** between **Registration** and **Student** to link course registrations.
    - Additionally, create a **lookup** between **Student** and **Case** objects to manage student queries.

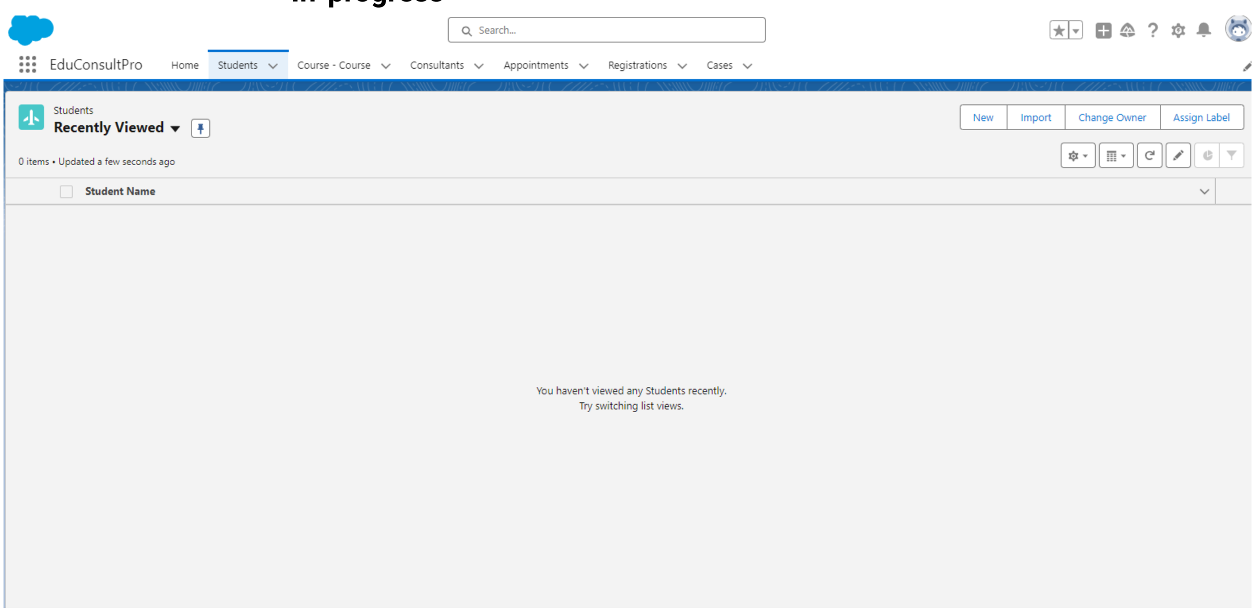
3. Create Tabs for Objects

1. **Create Object Tabs:**
    - Go to **Setup** and search for **Tabs**.
    - Create tabs for each of the following objects:
        - **Course**
        - **Consultant**
        - **Student**
        - **Appointment**
        - **Registration**

4. Configure the Case Object

4.1 Modify Case Fields

1. **Edit Type Field:**
    - In **Object Manager**, select **Case**.
    - Navigate to **Fields & Relationships** and find the **Type** field.
    - Add the following values:
        - **Immigration**
        - **Visa Application**
2. **Edit Status Field:**
    - Locate the **Status** field.
    - Add the following values:
        - **Open**
        - **In-progress**



5. Create a Lightning App

5.1 Setup EduConsultPro App

1. **App Manager:**
    - In **Setup**, search for **App Manager**.
    - Click on **New Lightning App**.
2. **App Configuration:**
    - Name the app **EduConsultPro** and follow the prompts (Next, Next, Next).
    - Add the following items to the app:

- **Home**
- **Students**
- **Courses**
- **Consultants**
- **Appointments**
- **Registrations**
- **Cases**

3. **Assign Profiles:**
   - From the available profiles, select **System Administrator**.
   - Click **Save & Finish** to complete the app creation.

Task-2: Create a ScreenFlow for Student Admission Application Process

1. Create a New ScreenFlow

1. **Access Flow Builder:**
   - In **Setup**, enter **Flow Builder** in the Quick Find box.
   - Click on **New Flow** and select **ScreenFlow**.
   - Click **Create** to start building the flow.

2. Add Student Info Screen Element

1. **Add Screen Element:**
   - Drag a **Screen** element onto the canvas.
   - In the **Screen Properties** pane, label it as **Student Info**.
2. **Create and Configure StudentRecordRes Resource:**
   - In the **Screen element**, click on **Fields**.
   - Select **Create New Resource** and choose **Record (StudentRecordRes)**.
   - Map this resource to the **Student** object to automatically pull in all fields from the Student object.
3. **Add Fields to the Screen:**
   - Drag the necessary fields (e.g., **Name**, **Email**, **Phone**, **Address**) from **StudentRecordRes** onto the screen to collect student information.
   - Click **Done** to save the screen.

3. Create Student Record Using Create Element

1. **Add Create Records Element:**
   - Drag a **Create Records** element onto the canvas after the **Student Info** screen.

- Label it as **Create Student Record**.

2. **Configure the Create Element:**
    - Under **How many records to create**, select **One**.
    - Under **How to Set the Record Fields**, select **Use all values from a record**.
    - Choose **StudentRecordRes** as the record variable to create the student record.
    - Click **Done** to save the element.

4. Add Course Selection Screen

1. **Add Screen Element:**
    - Drag another **Screen** element onto the canvas after the **Create Student Record** element.
    - Label it as **Course Screen**.
2. **Add Picklist Component:**
    - Drag a **Picklist** component from the left panel to the screen.
    - Label it as **Select Course**.
    - For choices, add:
        - IELTS
        - GRE
        - GMAT
        - Duolingo
        - TOEFL
    - Each choice automatically creates a variable with the respective name.
    - Click **Done** to save the screen.

5. Add Decision Element for Course Selection

1. **Add Decision Element:**
    - Drag a **Decision** element onto the canvas after the **Course Screen**.
    - Label it as **Selecting Course**.
2. **Configure Outcomes:**
    - For each course (IELTS, GRE, GMAT, Duolingo, TOEFL), create an outcome:
        - **Outcome Label**: For example, "Selected IELTS"
        - **Resource**: Select_Course (the variable created by the picklist)
        - **Operator**: Equals
        - **Value**: IELTS (or the respective course)
    - Repeat for all courses and click **Done**.

6. Add Get Record Element for Each Course

1. **Add Get Records Element:**

        - Add a **Get Records** element under the path for each course.
        - Label it as **Get IELTS Rec** (or the respective course).
    2. **Configure Get Record Element:**
        - **Object**: Course
        - **Condition Requirements**: All Conditions are Met (AND)
        - **Field**: Course Name
        - **Operator**: Equals
        - **Value**: {!Select_Course}
        - Repeat for **GRE**, **GMAT**, **TOEFL**, **Duolingo**.
        - Click **Done**.

7. Create Registration Record Using Create Records Element

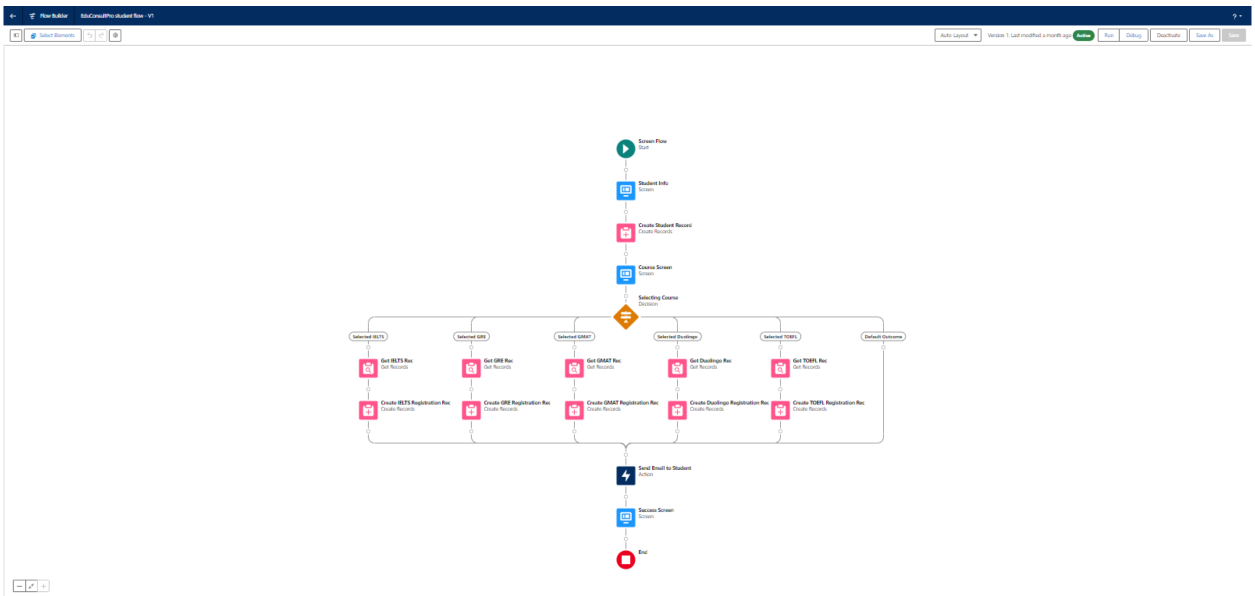
1. **Add Create Records Element:**
    - After each **Get Records** element, add a **Create Records** element.
    - Label it as **Create IELTS Registration Rec** (or the respective course).
2. **Configure Create Record Element:**
    - **Object**: Registration
    - **How many records to create**: One
    - **How to Set the Record Fields**: Use separate resources and literal values.
    - **Field**: **Course_Name__c**
    - **Value**: {!Get_IELTS_Rec.Id}
    - **Field**: **Student_Name__c**
    - **Value**: {!StudentRecordRes.Id}
    - Repeat for **GRE**, **GMAT**, **TOEFL**, **Duolingo**.
    - Click **Done**.

8. Create Email Text Template Variables

1. **Create Email Body Template:**
    - Click on the toolbox toggle in the left corner and select **New Resource**.
    - Choose **Text Template** as the resource type.
    - Label it as **StuRegistrationEmailTextTempBody**.
    - Select **View as Plain Text** and insert the email content.
    - Click **Done**.
2. **Create Email Subject Template:**
    - Repeat the process to create an email subject template.
    - Label it as **StuRegistrationEmailTextTempSub** and enter the desired subject text.
    - Click **Done**.

9. Add Action Element to Send Email

1. **Add Send Email Action:**
   - Add an **Action** element after each **Create Records** element.
   - Label it as **Send Email to Student**.
2. **Configure the Action:**
   - **Body**: {!StuRegistrationEmailTextTempBody}
   - **Recipient Address List**: {!StudentRecordRes.Email__c}
   - **Subject**: {!StuRegistrationEmailTextTempSub}
   - Click **Done**.



10. Add Success Screen

1. **Add Final Screen Element:**
   - Drag a **Screen** element after the **Send Email to Student** action.
   - Label it as **Success Screen**.
2. **Add Display Text Component:**
   - Add a **Display Text** component from the left panel.
   - Label it as **SuccessMessage**.
3. **Configure Success Message:**
   - Paste the content in the **Resource picker box**.
   - Click **Done**.

11. Save and Activate the Flow

1. **Save the Flow:**

- Click **Save** and name the flow **EduConsultPro Student Flow**.
- Click **Activate** to make the flow available for use.

Task 3: Creating a New User in Salesforce

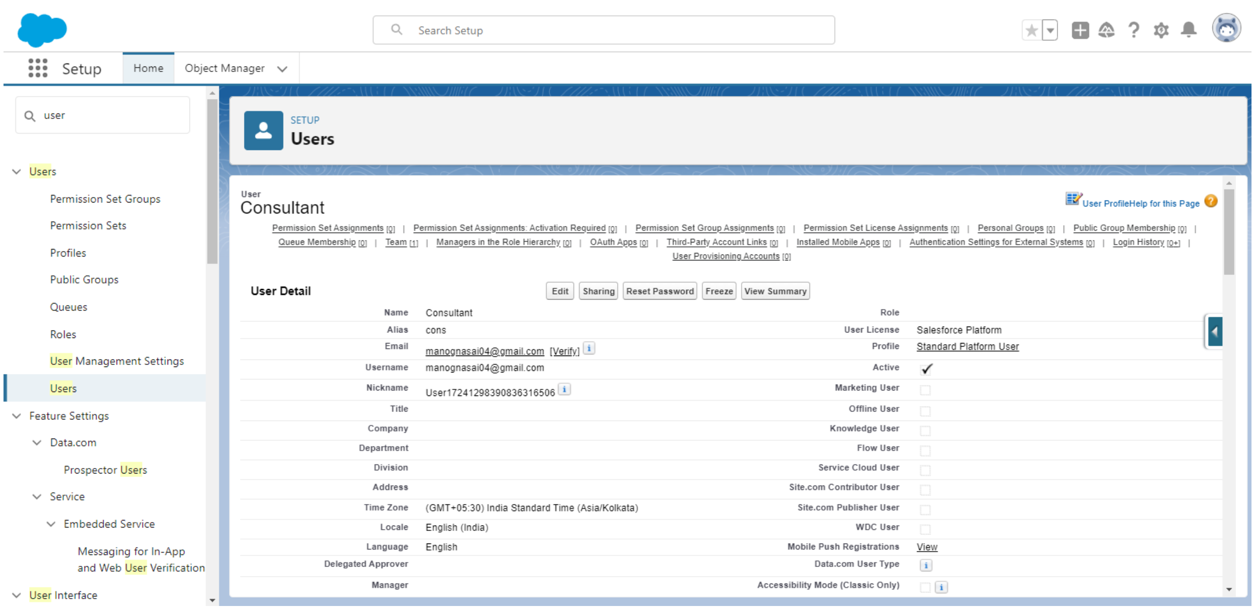
1.1 Create a User with a Standard Platform User Profile

1. Access User Setup:

- Navigate to Setup in Salesforce.
- Go to **Administration** → **Users** → **Users**.
- Click on **New User**.

2. Create User:

- **Last Name:** Enter "Consultant."
- **License:** Select **Salesforce Platform**.
- **Profile:** Select **Standard Platform User**.
- Fill in all mandatory fields, including:
  - **First Name**
  - **Email**
  - **Username**
  - **Alias**
- Click **Save** to create the user.



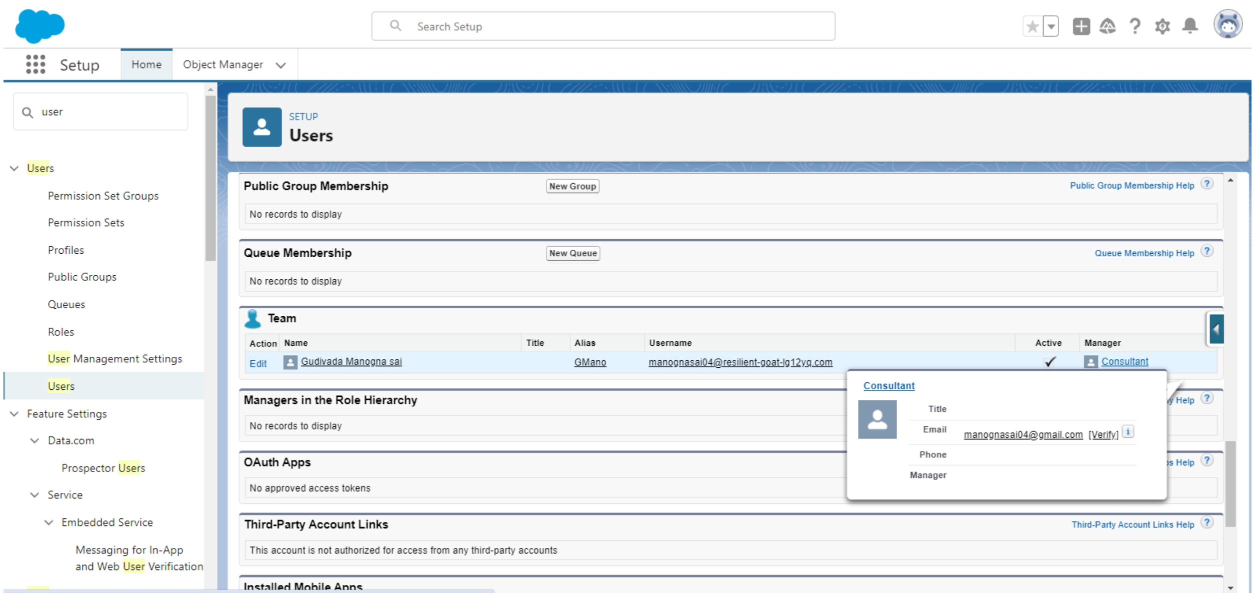
1.2 Configure the User Settings

1. Edit User Settings:

- Return to **Setup** → **Administration** → **Users**.
- Locate the newly created user "Consultant" and click **Edit** next to their name.

2. Configure Approver Settings:

- Scroll down to the **Approver Settings** section.
- In the **Manager** field, select "Consultant."
- Click **Save** to apply the changes.



Task 4: Creating an Approval Process for the Property Object

1.1 Create an Email Template

1. Access Lightning Email Templates:

- From Setup, enter "Templates" in the Quick Find box.
- Select **Lightning Email Templates** and toggle it on.

2. Create a New Folder for Email Templates:

- Go to App Launcher and search for **Email Templates**.
- Create a new folder and give it a desired name.

3. Create a New Email Template:

- Within the folder you just created, click to create a new email template.
- Enter the following details:
  - **Folder:** Select the folder you created.
  - **HTML Value:** Use the provided text below and save the template as **"Submission Template."**

4. Create Additional Email Templates:

- Create two more email templates using the same process for the approval and rejection of requests.

1.2 Create an Approval Process for Appointment Object

1. Access Approval Processes:

- From Setup, enter "Approval" in the Quick Find box.
- Select **Approval Processes**.

2. Create a New Approval Process:

- Under **Manage Approval Processes For**, select **Appointment**.
- Click **Create New Approval Process → Use Jump Start Wizard**.

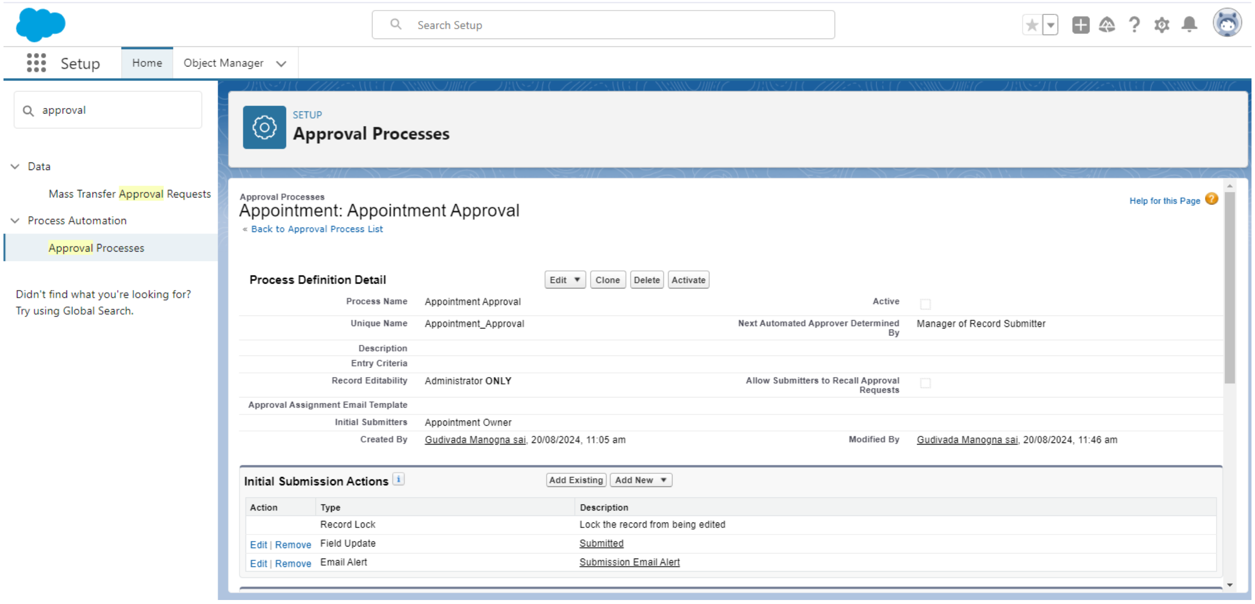
3. Configure the Approval Process:

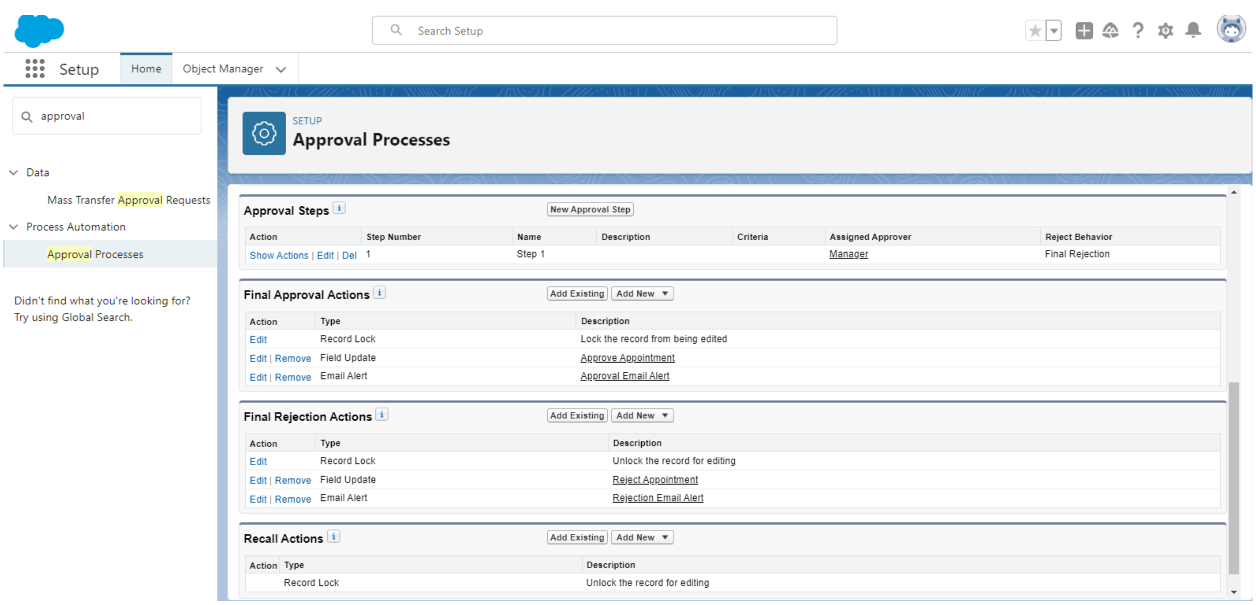
- **Process Name:** Enter "Appointment Approval."
- **Select Approver:** Choose **Manager** for "Automatically assign an approver using a standard or custom hierarchy field."
- Click **Next.**
- Under **Next Automated Approver Determined By**, select **Manager.**
- **Record Editability Properties:** Choose "Administrators OR the currently assigned approver can edit records during the approval process."
- Save the approval process.

4. Add Initial Submission Actions:

- Click **View Approval Process Detail Page.**
- Under **Initial Submission Actions**, click **Add New → Field Update.**
- Configure it with the following values:
  - **Name:** Submitted
  - **Field to Update:** Appointment: Status

■ **A Specific Value:** Pending





5. Add Email Alert:

- Click **Add New → Email Alert.**
- Configure it with the following values:
  - ■ **Description:** Submission Email Alert
  - ■ **Unique Name:** Auto Populates
  - ■ **Email Template:** Submission Template
  - ■ **Recipient Type:** Select your Name

6. Repeat for Final Approval and Rejection Actions:

- Repeat Steps 4 and 5 for **Final Approval** and **Final Rejection** actions, using the corresponding email templates.

Task 5: Create a Record-Triggered Flow

1.1 Configure the Start Element

1. Access Flows:

- From Setup, enter **Flows** in the Quick Find box.
- Select **Flows**.

2. Create a New Flow:

- Click **New Flow**.
- Select **Record-Triggered Flow**.
- Click **Create** to open the Configure Start window.

3. Configure Start:

- **Object:** Select **Appointment**.
- **Trigger the Flow When:** Select **A record is created**.

1.2 Add an Action Element

1. Add Action Element:

- After the Start Element, click to add an **Action** element.
- Select **Submit for approval** action.
- **Label the Action:** Name it **Approval SubFlow**.

2. Set the RecordId:

- Set the **RecordId** to `{!$Record.Id}`.

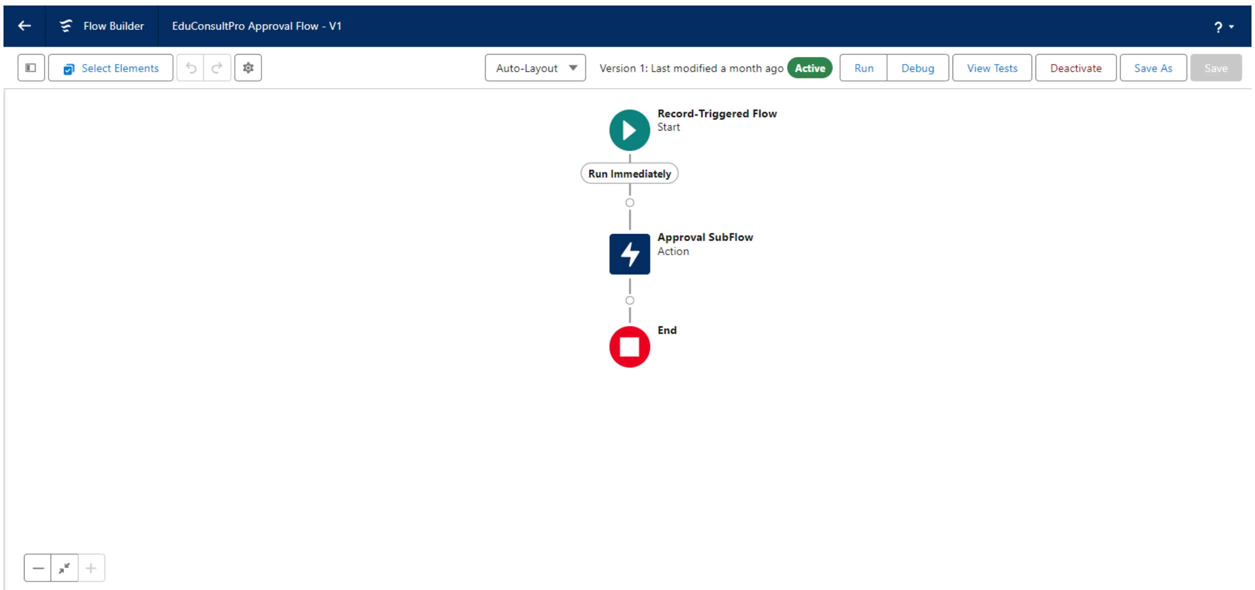
1.3 Save and Activate the Flow

1. Save the Flow:

- **Label:** Name the flow "**EduConsultPro Approval Flow.**"
- Click **Save**.

2. Activate the Flow:

- Click on **Activate** to make the flow live.



Task 6: Create a Screen Flow for Existing Students to Book an Appointment

1.1 Add Screen Element

1. Access Flow Builder:

- From Setup, enter **Flow Builder** in the Quick Find box.
- Select **New Flow** → **Screen Flow**.

2. Add a Screen Element:

- Add a **Screen** element.
- In the Screen Properties pane, label it "**Get Student Info.**"
- Add two **Text** components from the left panel:
    - **1st Text Component Label:** Enter Student Name
    - **2nd Text Component Label:** Enter Student Email
- Click **Done**.

1.2 Add GET Record Element

1. Add a GET Record Element:

- Add a **GET Record** element after the **Get Student Info** screen, label it "**Get Rec.**"
- **Select Object:** Student
- **Condition Requirements:** All Conditions are Met (AND)
    - **Field:** Student Name
        - **Operator:** Equals
        - **Value:** `{!Enter_Student_Name}`
    - **Field:** Email__c
        - **Operator:** Equals
        - **Value:** `{!Enter_Student_Email}`

1.3 Add Decision Element

1. Add a Decision Element:

- Add a **Decision** element after the **Get Rec** element, label it "**Appointment or Case.**"
- **Outcome Label:** Appointment
    - **Condition:**
        - **Resource:** `{!How_may_I_Help_you}`
        - **Operator:** Equals
        - **Value:** `{!Book_an_Appointment}`
- Click the **+** icon and repeat for case options.
- Click **Done**.

1.4 Add Screen Element for Appointment Booking

1. Add a Screen Element:

- Add a **Screen** element after the Decision element on the Appointment path, label it "**Appointment Booking Screen.**"
- Click on **Fields**, select the record variable input, and create a new Resource (**AppointmentRecordRes**) to display all fields in the Appointment object.
- Drag the necessary fields to the screen to collect student information.
- Click **Done**.

1.5 Add GET Record Element for Consultant

1. Add a GET Record Element:

- Add a **GET Record** element after the Appointment path's Decision element, label it **"Get Consultant Rec."**
- **Select Object:** Consultant
- **Condition Requirements:** All Conditions are Met (AND)
  - **Field:** Name
    - **Operator:** Equals
    - **Value:** `{!AppointmentRecordRes.Consultant_Name__c}`

1.6 Create Appointment Record using Create Records Element

1. Add a Create Records Element:

- Add a **Create Records** element after the **Get Consultant Rec** element, label it **"Create Appointment."**
- **How many records to create:** One
- **How to set the record fields:** Use separate resources and literal values.
- **Select Object:** Appointment
  - **Field:** Appointment_DateTime__c
    - **Value:** `{!AppointmentRecordRes.Appointment_DateTime__c}`
  - **Field:** Consultant__c
    - **Value:** `{!Get_Consultant_Rec.Id}`
  - **Field:** Notes__c
    - **Value:** `{!AppointmentRecordRes.Notes__c}`
  - **Field:** PurposeTopic__c
    - **Value:** `{!AppointmentRecordRes.PurposeTopic__c}`
  - **Field:** Student_Name__c
    - **Value:** `{!Get_Rec.Id}`

1.7 Add Confirmation Screen Element

1. Add a Screen Element:

- Add a **Screen** element after the Create Appointment element, label it **"Confirmation Screen."**
- From the left panel, drag the **Display Text** component to the main panel, label it **"Appointment_Confirmation."**
- Add the relevant confirmation message in the Resource picker box.
- Click **Done.**

1.8 Add SubFlow Element

1. Add a SubFlow Element:

- Add a **SubFlow** element after the Decision element on the Case path.
- Search for and select **Create a Case.**
- Label it "**Create Student Case.**"

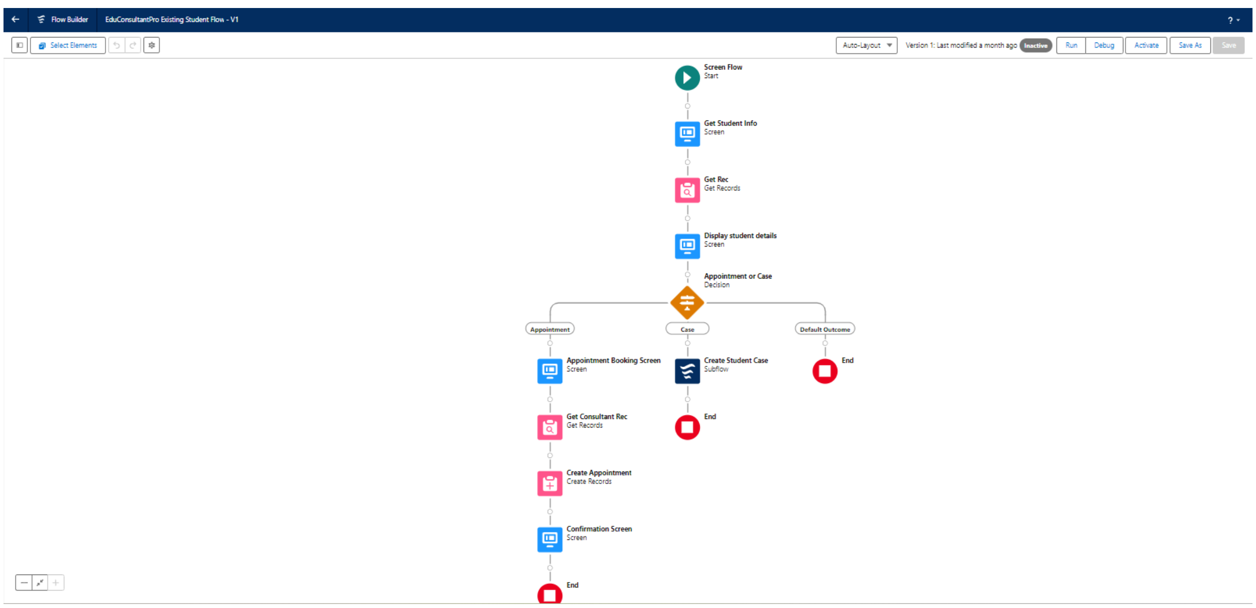
1.9 Save and Activate the Flow

1. Save the Flow:

- **Label:** Name the flow "**EduConsultPro Existing Student Flow.**"
- Click **Save.**

2. Activate the Flow:

- Click **Activate** to make the flow live.



Task-7: Create Screen Flow to Combine All Flows

1. Add Welcome Screen Element:

- **1.1 Add Screen Element**:
    - From the toolbox, drag a **Screen** element onto the flow canvas.
    - Set **Label** to "Welcome Screen".
- **1.2 Configure Display Text**:

- On the **Screen** element, drag the **Display Text** component from the left-side panel.
- Set the **Label** to "SuccessMessage".
- In the **Resource Picker Box**, enter the welcome message or content you want to display to users, e.g., "Welcome to EduConsultantPro! Please confirm whether you are an existing student."
- Click **Done**.

2. Add Existing or New Student Confirmation Screen:

- **2.1 Add Screen Element**:
  - After the "Welcome Screen", drag another **Screen** element from the toolbox onto the flow canvas.
  - Set **Label** to "Existing or New Student Confirmation Screen".
- **2.2 Add Radio Button Component**:
  - In the **Screen** element, drag the **Radio Buttons** component from the left-side panel.
  - Set the **Label** to "Are you an Existing Student?".
  - Click **Add Choice** to create the options:
    - First Choice: Set **Type** to "Yes" and click **Create Yes Choice**.
    - Repeat to add another Choice for **No**.
  - Click **Done**.

3. Add Decision Element:

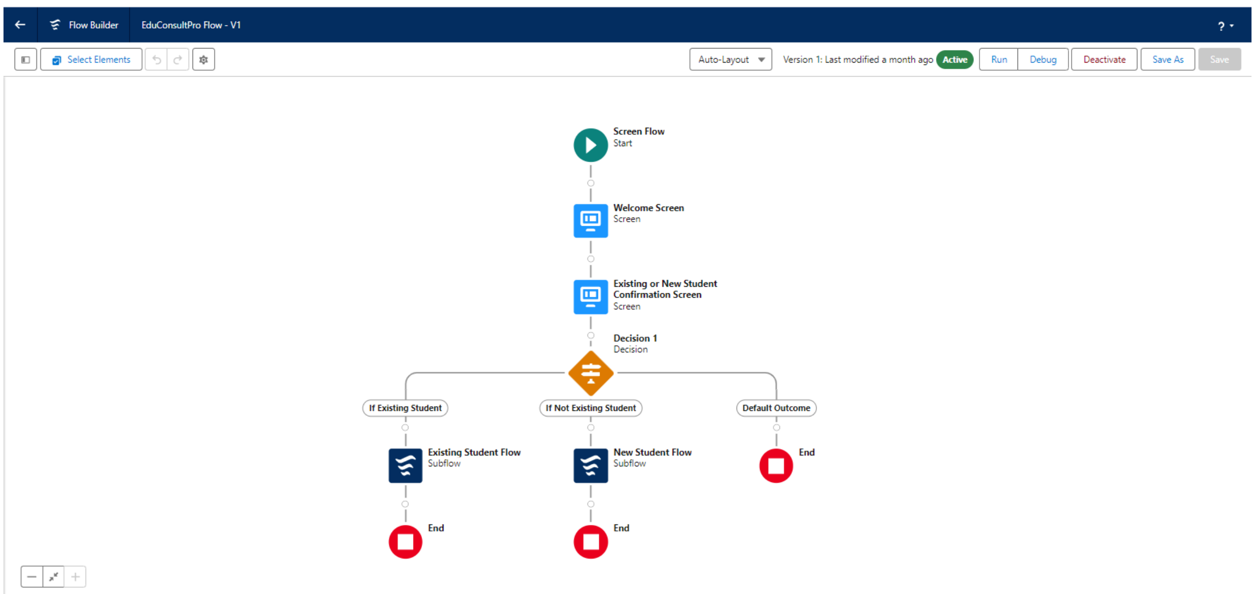
- **3.1 Add Decision Element**:
  - Drag a **Decision** element from the toolbox onto the canvas, right after the "Existing or New Student Confirmation Screen".
  - Set **Label** to "Decision 1".
- **3.2 Configure Outcomes**:
  - For the first outcome, set the **Outcome Label** to "If Existing Student".
    - Set the **Condition** as follows:
      - **Resource**: `{!Are_you_an_Existing_Student}`
      - **Operator**: Equals
      - **Value**: `{!Yes}`
  - Click the **+** icon to create another outcome for "If Not Existing Student":
    - Set **Condition** similarly, but set the **Value** to `{!No}`.
  - Click **Done**.

4. Add SubFlow Elements:

- **4.1 Add SubFlow for Existing Students**:
    - On the path for "If Existing Student", drag a **SubFlow** element from the toolbox.
    - Search for and select **"EduConsultantPro Existing Student Flow"**.
    - Set the **Label** to "Existing Student Flow".
- **4.2 Add SubFlow for New Students**:
    - On the path for "If Not an Existing Student", drag another **SubFlow** element.
    - Search for and select **"EduConsultantPro Student Flow"**.
    - Set the **Label** to "New Student Flow".

5. Save and Activate the Flow:

- **5.1 Save the Flow**:
    - Click **Save**.
    - Set the **Label** to "EduConsultPro Flow".
    - Click **Save**.
- **5.2 Activate the Flow**:
    - Once saved, click **Activate** to make the flow live.



Task-8: Create and Assign a Lightning App Page for EduConsultPro

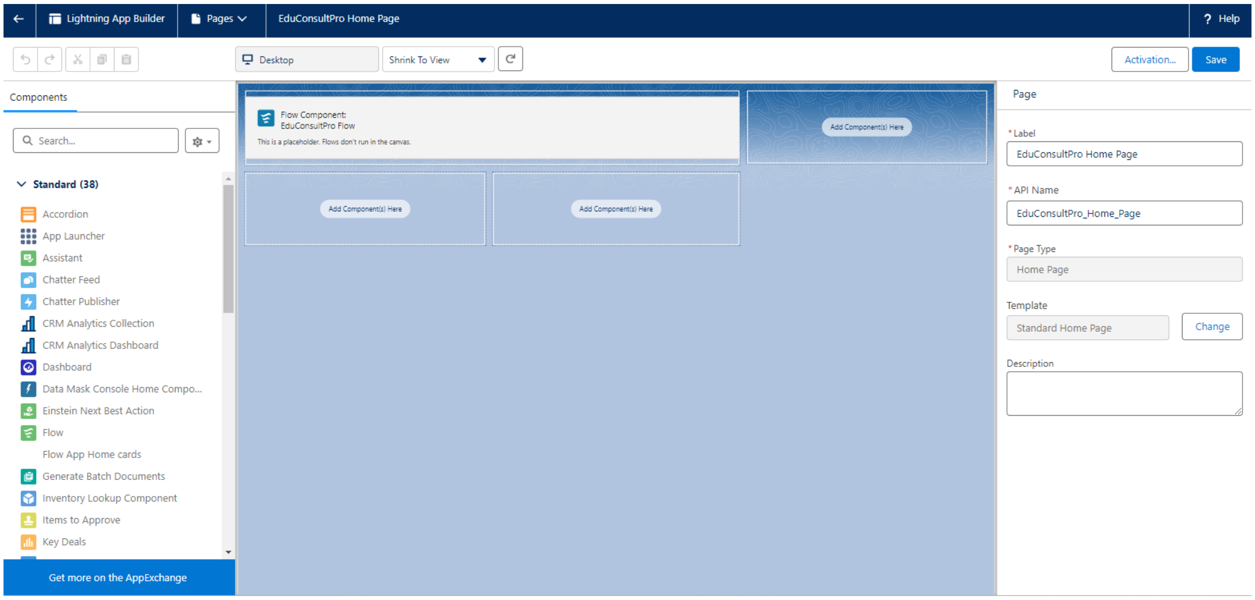
1.1 Create a Lightning App Page

1. **Access Lightning App Builder:**
    - From **Setup**, enter **App Builder** in the Quick Find box.
    - Click on **Lightning App Builder**.

2. **Start Creating a New Page:**
    - Click **New**.
    - Select **Home Page**.
    - Click **Next**.
3. **Configure the Page:**
    - **Page Name**: Enter "**EduConsultPro Home Page**".
    - **Template**: Select the **Standard Home Page** template.
    - Click **Done**.
4. **Add Flow Component:**
    - Drag the **Flow** component to the top-right region of the page.
5. **Search and Configure Flow:**
    - In the Flow search box, type **"EduConsultPro Flow"**.
    - Select the flow **EduConsultPro Flow** and click **Save**.

1.2 Activate the Lightning App Page

1. **Activate the Page:**
    - Click **Activate**.
2. **Assign Page to Apps and Profiles:**
    - Click **App and Profile**.
    - Click **Assign to Apps and Profiles**.
3. **Configure App Assignment:**
    - **Select App**: Choose the **EduConsultPro App** (or the relevant app in your environment, e.g., Sales or Service app).
    - Click **Next**.
4. **Configure Profile Assignment:**
    - Scroll down the list of profiles and select **System Administrator**.
    - Click **Next**.
5. **Review and Save:**
    - Review the assignment details.
    - Click **Save**.


Lightning App Builder
Pages
EduConsultPro Home Page
Help
Desktop
Shrink To View
Activation...
Save
Components
Search...
Standard (38)
Accordion
App Launcher
Assistant
Chatter Feed
Chatter Publisher
CRM Analytics Collection
CRM Analytics Dashboard
Dashboard
Data Mask Console Home Compo...
Einstein Next Best Action
Flow
Flow App Home cards
Generate Batch Documents
Inventory Lookup Component
Items to Approve
Key Deals
Get more on the AppExchange
Flow Component:
EduConsultPro Flow
This is a placeholder. Flows don't run in the canvas.
Add Component(s) Here
Add Component(s) Here
Add Component(s) Here
Page
* Label
EduConsultPro Home Page
* API Name
EduConsultPro_Home_Page
* Page Type
Home Page
Template
Standard Home Page
Change
Description