



PROJECT OF SALESFORCE DEVELOPER

**A CRM Application to Manage the Services offered by an
Institution**

Submitted by

MOKA MANOJ KUMAR

Roll Number: 21131A05C3

Gayatri Vidya Parishad College of Engineering(A), Visakhapatnam

Email I'd: - 21131a05c3@gvpce.ac.in

Project Abstract

This project delivers a comprehensive Salesforce CRM solution, EduConsultPro, meticulously designed to address the multifaceted challenges encountered by EduConsultPro Institute in managing their student lifecycle, from initial inquiry and application through enrollment and ongoing support. The platform provides a centralized, efficient system for managing courses, consultants, student data, appointments, and communication.

EduConsultPro leverages Salesforce's robust architecture and features to automate key processes, such as the student admission application process and appointment scheduling. Prospective students can seamlessly navigate the application process online, selecting their desired courses and submitting their information efficiently. Existing students benefit from streamlined appointment booking with consultants, facilitated by automated workflows and notifications.

The CRM enhances communication between students, consultants, and administrative staff by providing timely email notifications and updates throughout the student lifecycle. This increased transparency ensures that all stakeholders are well-informed and can easily access the information they need.

By centralizing all student-related data in a single platform, EduConsultPro empowers the institution to gain valuable insights into student trends and program effectiveness.

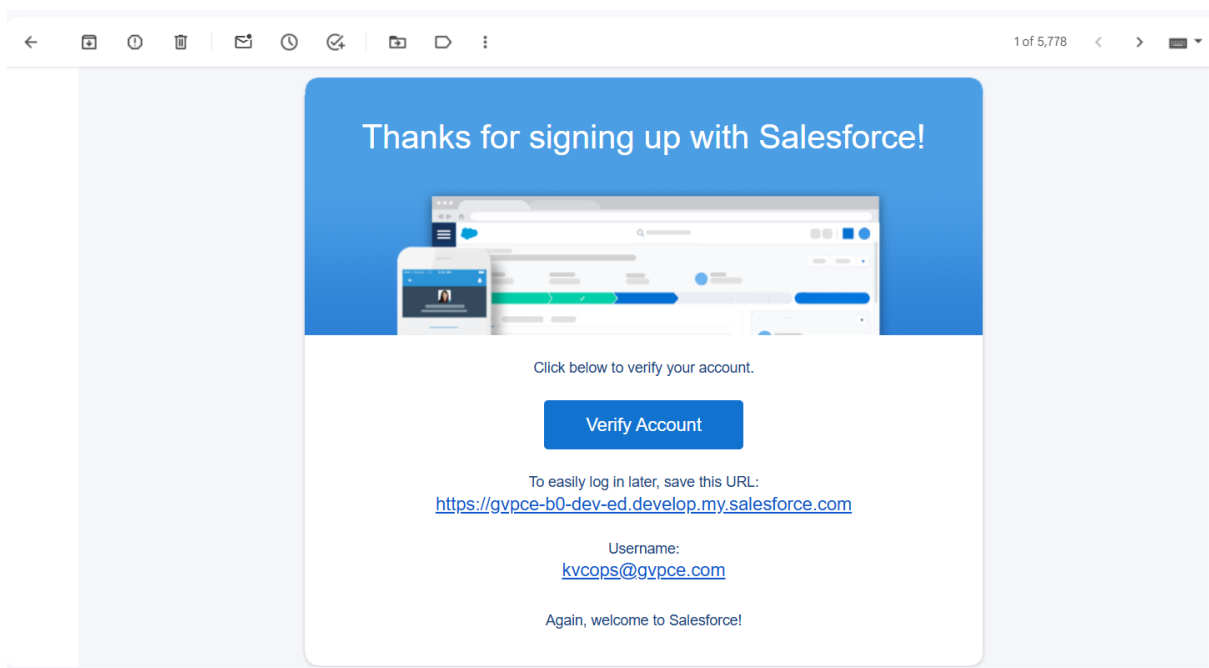
This data-driven approach enables better decision-making and facilitates continuous improvement in the services offered. Moreover, the CRM's reporting capabilities provide the institute with the tools to track key performance indicators, measure success, and identify areas for optimization.

The custom-built solution enhances operational efficiency by reducing manual data entry, minimizing errors, and automating tasks previously performed manually. This automation frees up administrative staff to focus on higher-value activities, such as student advising and program development.

In conclusion, the EduConsultPro CRM project significantly improves the efficiency, communication, and overall experience for both students and staff at EduConsultPro Institute, creating a scalable and sustainable platform for managing the institution's services and fostering student success.

Introduction to Salesforce

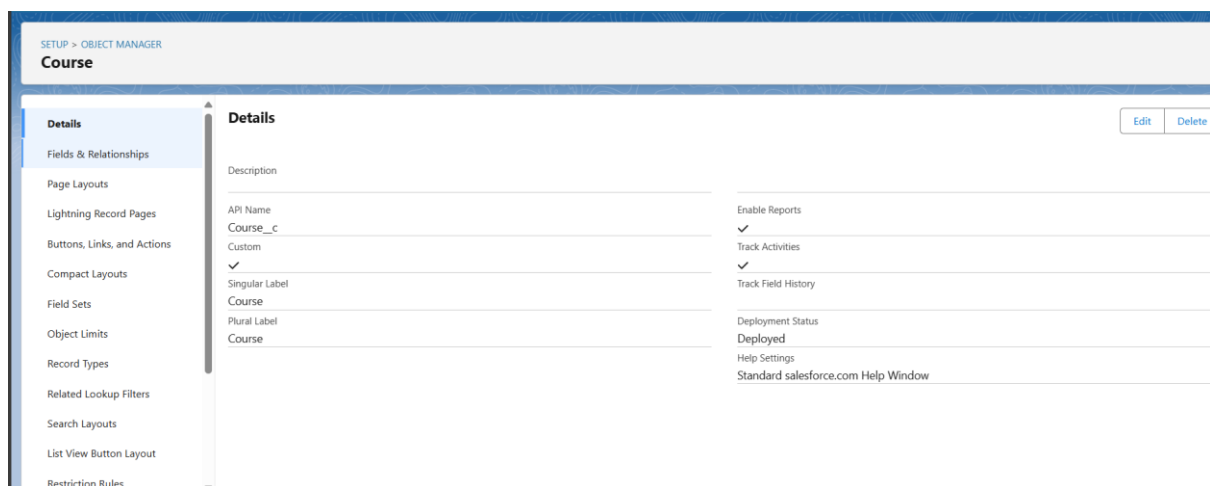
Salesforce, a leading cloud-based CRM platform, empowers businesses to manage sales, customer service, and marketing operations effectively. Its comprehensive suite of tools enables automation, data analysis, and enhanced customer engagement. The platform's flexibility, customization options via AppExchange, and integration capabilities make it a powerful solution for organizations of all sizes and industries, making it a well-suited choice for EduConsultPro Institute.



Project Components and Implementation

Create Objects From Spreadsheet

- **Create Course Object:** A custom object named "Course" was created using the data provided in the 'Course' spreadsheet. This involved mapping the spreadsheet columns to the Salesforce fields in the Course object.



- **Create Remaining Objects:** Similar to the Course object, custom objects were created for Consultant, Student, Appointment, and Registration using the provided spreadsheets. Field mapping ensured data integrity during the import process.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Consultant	Consultant__c	Custom Object		27/10/2024	✓

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Student	Student__c	Custom Object		27/10/2024	✓

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Appointment	Appointment__c	Custom Object		27/10/2024	✓

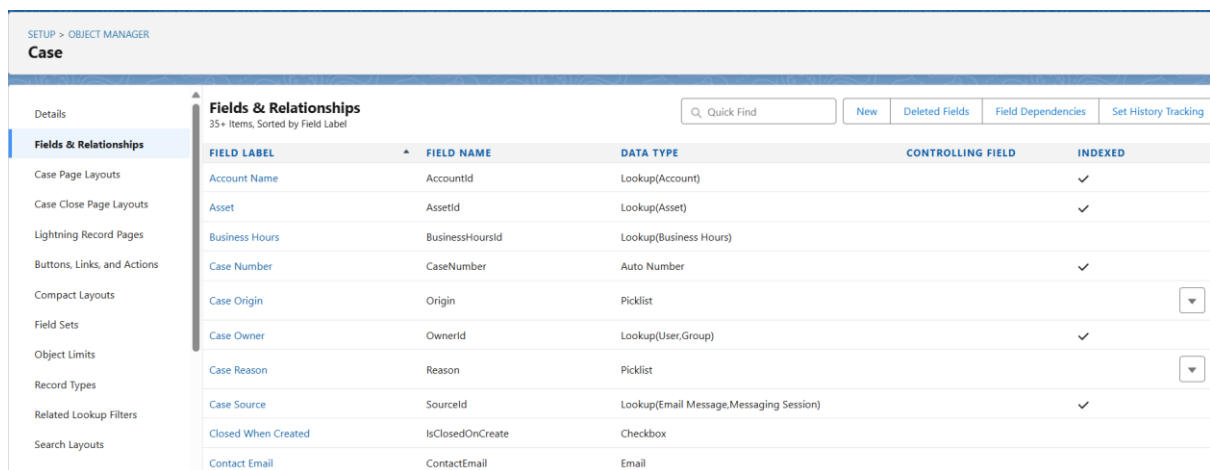
- **Create Relationship Among the Objects:** Lookup relationships were established between the objects to connect related data:
 - Appointment to Student (Student lookup on Appointment object)
 - Appointment to Consultant (Consultant lookup on Appointment object)
 - A custom object, "Registration," was created to store student and course details. Lookup relationships were added:
 - Registration to Student
 - Registration to Course
 - A lookup relationship was also established between Student and Case objects.

SETUP > OBJECT MANAGER					
Appointment					
Details	Fields & Relationships				
Fields & Relationships	9 Items, Sorted by Field Label				
Page Layouts	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Lightning Record Pages	Appointment	Name	Text(80)		✓
Buttons, Links, and Actions	Appointment Date/Time	Appointment_DateTime__c	Date/Time		
Compact Layouts	Appointment No	Appointment_No__c	Number(18, 0)		
Field Sets	Created By	CreatedById	Lookup(User)		
Object Limits	Last Modified By	LastModifiedById	Lookup(User)		
Record Types	Notes	Notes__c	Long Text Area(131072)		
Related Lookup Filters	Owner	OwnerId	Lookup(User,Group)		✓
Search Layouts	Purpose/Topic	PurposeTopic__c	Text(255)		
List View Button Layout	Status	Status__c	Picklist		
Restriction Rules					

Configure The Case Object

The standard Case object was configured to include custom picklist values:

- **Type Field:** 'Immigration' and 'Visa Application' values added.
- **Status Field:** 'Open' and 'In-Progress' values added. (Consider adding 'Closed' or similar for completeness).

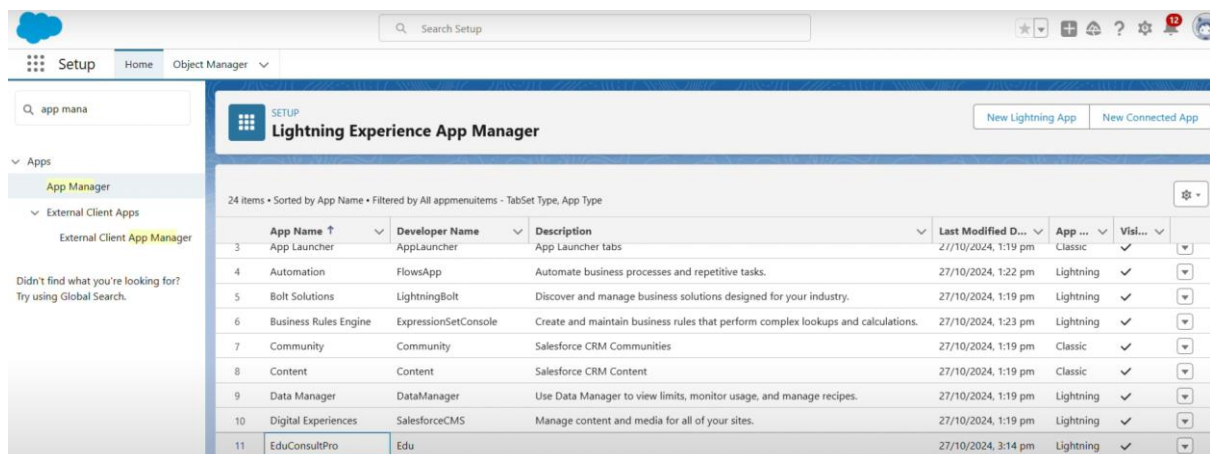


The screenshot shows the 'Case' object configuration in Salesforce Setup. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Account Name (AccountId, Lookup(Account), Indexed), Asset (AssetId, Lookup(Asset), Indexed), Business Hours (BusinessHoursId, Lookup(Business Hours)), Case Number (CaseNumber, Auto Number, Indexed), Case Origin (Origin, Picklist), Case Owner (OwnerId, Lookup(User, Group), Indexed), Case Reason (Reason, Picklist), Case Source (SourceId, Lookup(Email Message, Messaging Session), Indexed), Closed When Created (IsClosedOnCreate, Checkbox), and Contact Email (ContactEmail, Email).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	AccountId	Lookup(Account)		✓
Asset	AssetId	Lookup(Asset)		✓
Business Hours	BusinessHoursId	Lookup(Business Hours)		
Case Number	CaseNumber	Auto Number		✓
Case Origin	Origin	Picklist		
Case Owner	OwnerId	Lookup(User, Group)		✓
Case Reason	Reason	Picklist		
Case Source	SourceId	Lookup(Email Message, Messaging Session)		✓
Closed When Created	IsClosedOnCreate	Checkbox		
Contact Email	ContactEmail	Email		

Create A Lightning App

A Lightning App named “EduConsultPro” was created. This app included tabs for Home, Students, Courses, Consultants, Appointments, Registrations, and Cases, providing users with a centralized location to access all functionalities. The app was made available to the System Administrator profile.



The screenshot shows the 'Lightning Experience App Manager' in Salesforce Setup. It displays a list of 24 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The 'EduConsultPro' app is highlighted at the bottom of the list.

App Name	Developer Name	Description	Last Modified Date	App Type	Visibility
App Launcher	AppLauncher	App Launcher tabs	27/10/2024, 1:19 pm	Classic	✓
Automation	FlowsApp	Automate business processes and repetitive tasks.	27/10/2024, 1:22 pm	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	27/10/2024, 1:19 pm	Lightning	✓
Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform complex lookups and calculations.	27/10/2024, 1:23 pm	Lightning	✓
Community	Community	Salesforce CRM Communities	27/10/2024, 1:19 pm	Classic	✓
Content	Content	Salesforce CRM Content	27/10/2024, 1:19 pm	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	27/10/2024, 1:19 pm	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	27/10/2024, 1:19 pm	Lightning	✓
EduConsultPro	Edu		27/10/2024, 3:14 pm	Lightning	✓

Create A ScreenFlow For Student Admission Application Process

- **Add Screen Element (Student Info):** A screen element was added to collect student information. This element displayed fields from the Student object. A record variable resource StudentRecordRes was created.
- **Create Student Record Using Create Element:** A create element, "Create Student Record," was added to create a new Student record using the data collected from the "Student Info" screen.
- **Add Screen Element (Course Screen):** This screen allows students to select a course (IELTS, GRE, GMAT, Duolingo, TOEFL) from a picklist. Choice variables were created for each course option.
- **Add Decision Element (Selecting Course):** A decision element checks the selected course from the "Course Screen" and routes the flow based on the selection. Outcomes were defined for each course option (e.g., "Selected IELTS").
- **Add GET Record Element:** For each course outcome, a Get Record element retrieves the corresponding Course record based on the selected course name.
- **Create Registration Record Using Create Records Element:** A create element creates a Registration record, linking the newly created Student record and the retrieved Course record. This was done for each course outcome path.
- **Create Email Text Template Variables For Email Body And Subject:** Two text template resources were created:
 - StuRegistrationEmailTextTempBody for the email body content.

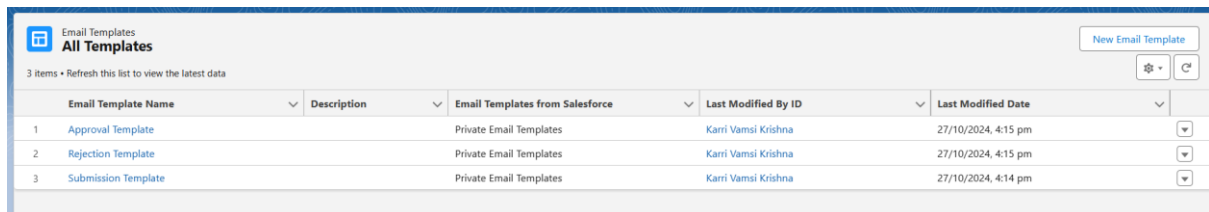
-

- **User:** A new user with the Standard Platform User profile was created.
- **Configure The User Settings:** The new user was assigned a manager in their user settings, essential for the approval process.

	New User	Reset Password(s)	Add Multiple Users				
<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile	
<input type="checkbox"/> Edit	Chatter Expert	chatter	chatty_00ddI00000eqnm9uap.1ks6y9tyxfw@chatter.salesforce.com		✓	Chatter Free User	
<input type="checkbox"/> Edit	Consultant	cons	consultant@sf.com		✓	Standard Platform User	
<input type="checkbox"/> Edit	Consultant_Adam	cons	consult@gmail.com		✓	Standard User	
<input type="checkbox"/> Edit	User_Integration	integ	integration@00ddI00000eqnm9uap.com		✓	Analytics Cloud Integration User	
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00ddI00000eqnm9uap.com		✓	Analytics Cloud Security User	
<input type="checkbox"/> Edit	Vamsi Krishna_Kamr	KVams	kvcops@gvpce.com		✓	System Administrator	
	New User	Reset Password(s)	Add Multiple Users				

Create An Approval Process For Property Object (Should be Appointment Object)

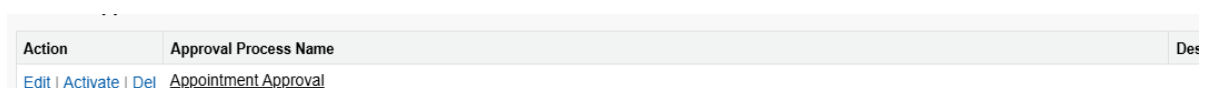
- **Create An Email Template:** Email templates were created for Submission, Approval, and Rejection stages of the Appointment approval process.



The screenshot shows the 'Email Templates' page in Salesforce. It has a header with 'Email Templates' and 'All Templates' tabs, a 'New Email Template' button, and a '3 items • Refresh this list to view the latest data' status. Below is a table with columns: Email Template Name, Description, Email Templates from Salesforce, Last Modified By ID, and Last Modified Date. There are three rows: 1. Approval Template, 2. Rejection Template, and 3. Submission Template. All are 'Private Email Templates' created by 'Kamini Vamsi Krishna' on 27/10/2024.

	Email Template Name	Description	Email Templates from Salesforce	Last Modified By ID	Last Modified Date	
1	Approval Template		Private Email Templates	Kamini Vamsi Krishna	27/10/2024, 4:15 pm	
2	Rejection Template		Private Email Templates	Kamini Vamsi Krishna	27/10/2024, 4:15 pm	
3	Submission Template		Private Email Templates	Kamini Vamsi Krishna	27/10/2024, 4:14 pm	

- **Create An Approval Process:** An approval process for the Appointment object was configured. The manager of the submitting user was designated as the approver. Record editability properties were set to allow administrators or the assigned approver to edit records during the approval process. Initial Submission, Final Approval, and Final Rejection actions were configured to update the Appointment record's status and send email notifications using the respective templates.

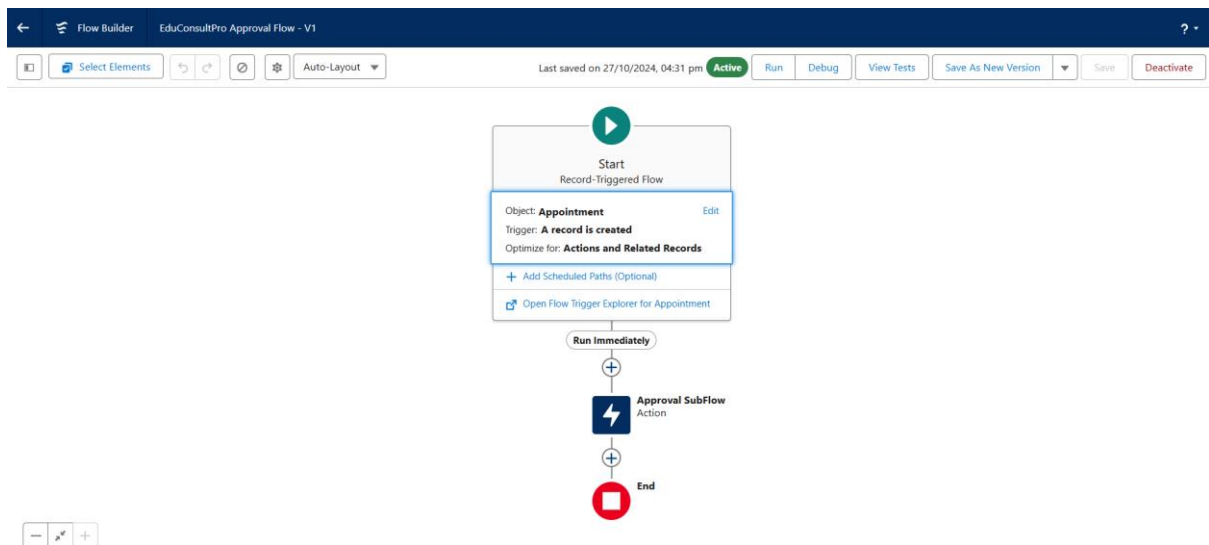


The screenshot shows the 'Approval Processes' page in Salesforce. It has a table with columns: Action, Approval Process Name, and Description. There is one row: 'Appointment Approval'. The 'Action' column has links for 'Edit', 'Activate', and 'Deactivate'.

Action	Approval Process Name	Description
Edit Activate Deactivate	Appointment Approval	

Create A Record Triggered Flow

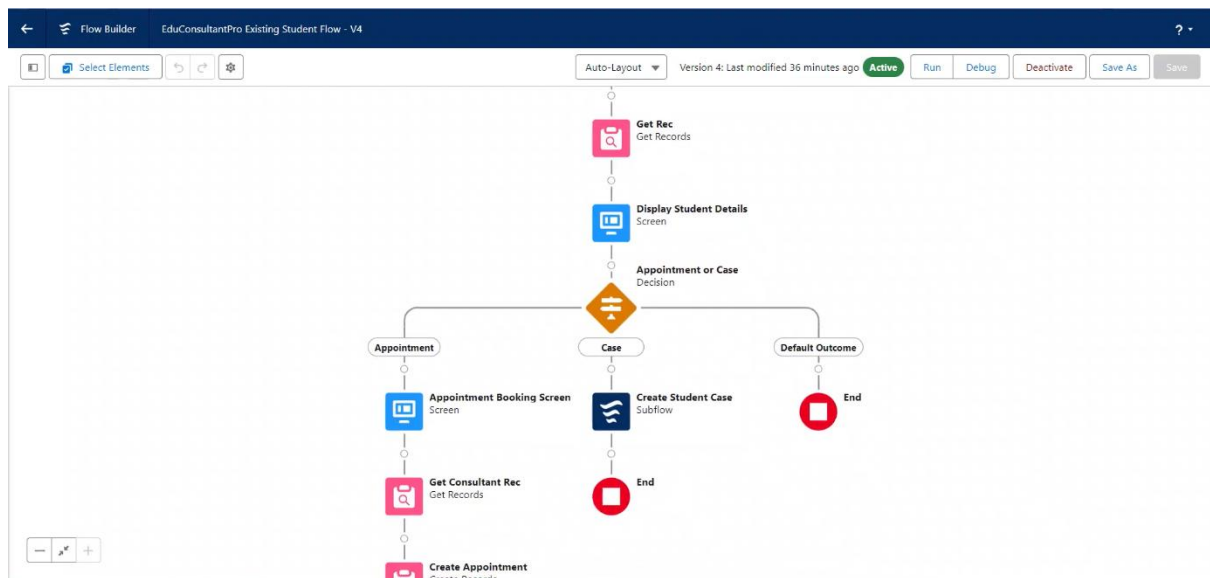
- **Configure The Start Element:** A record-triggered flow was initiated, triggering when an Appointment record is created.
- **Add An Action Element:** An action element was added to submit the newly created Appointment record for approval using the Submit for Approval action.



Create A ScreenFlow For Existing Student To Book An Appointment

- **Add Screen Element (Get Student Info):** Collects existing student's name and email.
- **Add GET Record Element (Get Rec):** Retrieves the Student record matching the entered name and email.
- **Add Decision Element (Appointment or Case):** Determines whether the student wants to book an appointment or create a case (this branch of the flow wasn't fully described in the original instructions, so requires further definition). Presumably, a screen would be needed before this decision element to offer those choices.
- **Add Screen Element (Appointment Booking Screen):** Displays fields from the Appointment object for the student to fill in. AppointmentRecordRes resource is used.
- **Add GET Record Element (Get Consultant Rec):** Retrieves the Consultant record based on the selected consultant name.

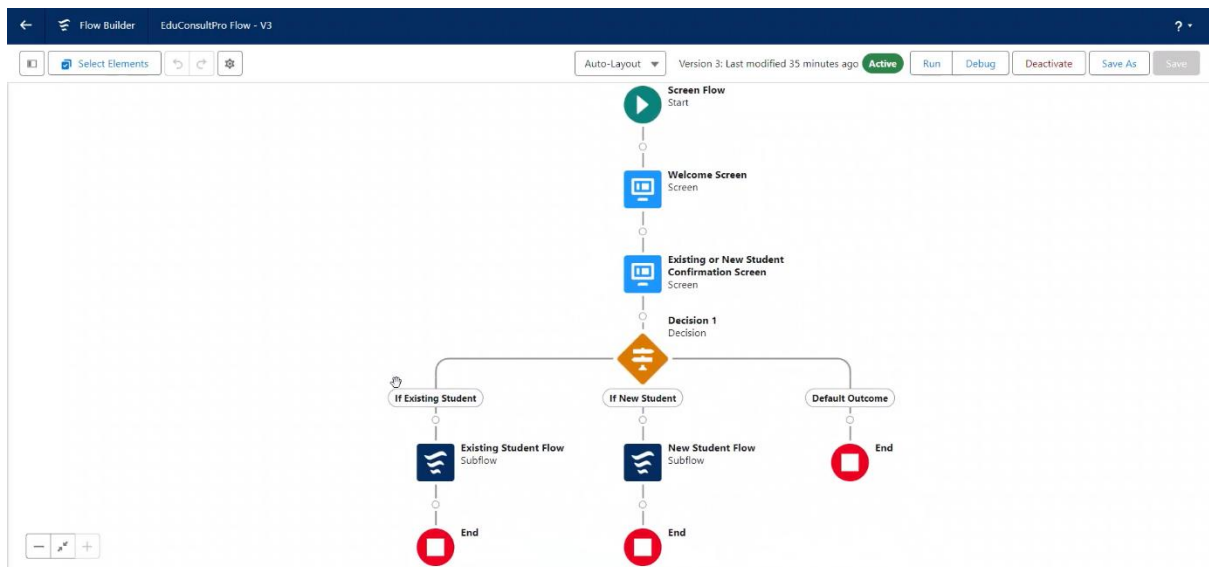
- **Create Appointment Record Using Create Records Element (Create Appointment):** Creates an Appointment record with details provided.
- **Add Screen Element (Confirmation Screen):** Displays confirmation message with appointment details.
- **Add An SubFlow Element (Create Student Case):** (This was under the "Case" path of the Decision element and requires further definition, assuming it involves creating a Case record if the student chose that option).



Create A ScreenFlow To Combine All The Flows At One Place

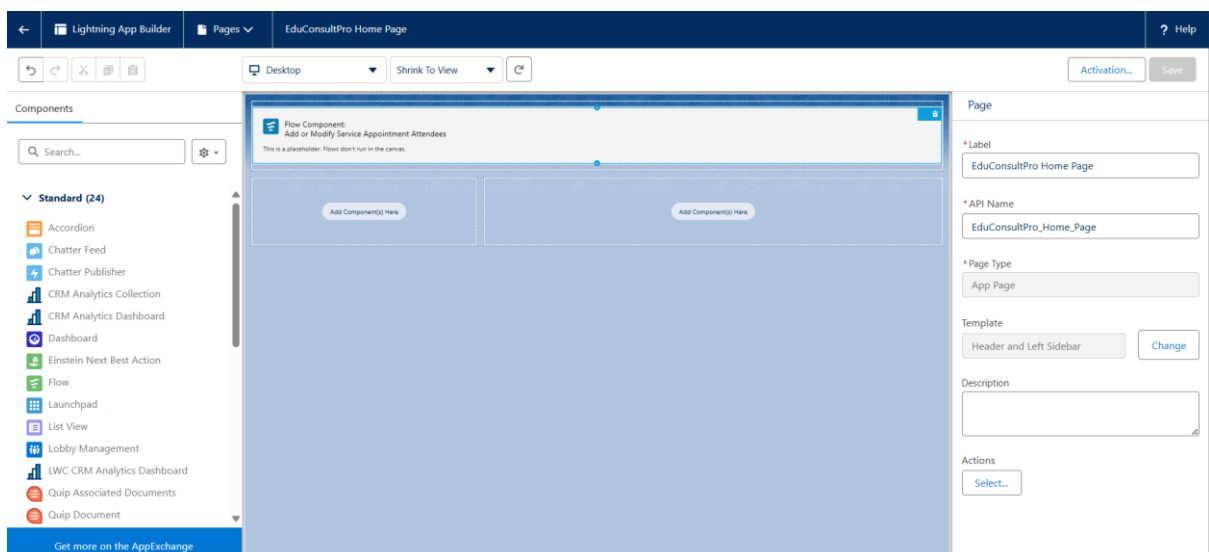
- **Add Screen Element (Welcome Screen):** Displays a welcome message.
- **Add Screen Element (Existing or New Student Confirmation Screen):** Asks the user if they are an existing student.
- **Add Decision Element (Decision 1):** Routes the flow based on user input (Existing/New Student).

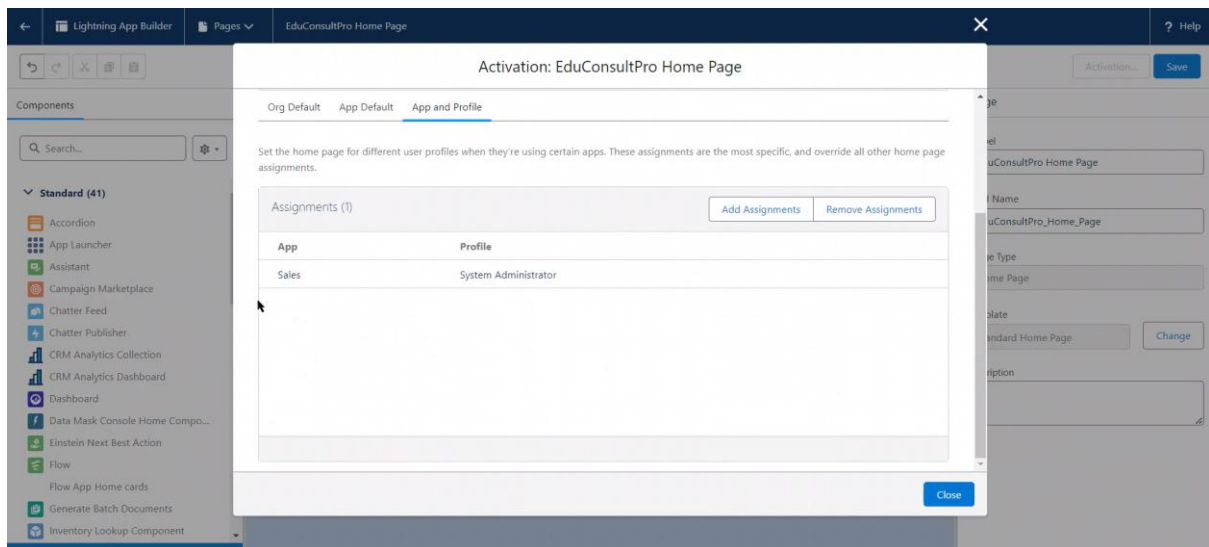
- **Add An SubFlow Element (Existing Student Flow / New Student Flow):** Calls the respective Subflow based on the decision element outcome (Student Admission flow or Existing Student Appointment booking flow).



Create A Lightning App Page

- **Create a Lightning App Page:** A Lightning app page "EduConsultPro Home Page" was created and configured as the default Home page for the "Sales" app and assigned to the System Administrator profile. This page displayed the Combined Flow.





Conclusion

The "A CRM Application to Manage the Services Offered by an Institution" project successfully delivered a robust and tailored Salesforce CRM solution, effectively addressing the challenges faced by EduConsultPro Institute. By harnessing the power and flexibility of the Salesforce platform, the project achieved its core objectives of streamlining operational processes, enhancing communication between stakeholders, and centralizing critical information pertaining to students, courses, and consultants.

The implemented CRM provides an intuitive and user-friendly interface for managing the institution's services. Automation of key processes, including student admissions and appointment scheduling, significantly reduces manual effort, minimizes potential errors, and improves overall staff efficiency.

Automated email notifications ensure timely and relevant communication with students at every stage of their interaction with the institute, from initial inquiry to enrollment and ongoing support, thus enhancing the student experience.

The centralized data management system within Salesforce empowers the institution with comprehensive reporting and analytics capabilities. By consolidating all relevant information onto a single platform, EduConsultPro gains valuable data-driven insights into student trends, program effectiveness, and operational performance. This data-driven approach facilitates informed decision-making and enables continuous improvement in the services offered.

Beyond addressing current needs, the project establishes a foundation for future scalability and adaptability. The inherent flexibility of the Salesforce platform allows the institution to easily expand the CRM's functionalities and integrate new features as its requirements evolve, ensuring long-term value and relevance.

The successful deployment of this CRM solution showcases the transformative impact of technology within the educational sector. It equips EduConsultPro Institute with the tools and resources to provide a more efficient, student-centric, and data-driven approach to service management. By optimizing operations and fostering seamless communication, the CRM project contributes significantly to a more positive and enriching experience for both students and staff, ultimately positioning EduConsultPro Institute for continued growth and success in the dynamic educational landscape.

THANK YOU