A CRM Application to Manage the Services offered byan Institution

Project Overview

The objective of this CRM application is to centralize and streamline all customer interactions, service requests, and follow-ups, thereby enhancing the quality and efficiency of service delivery within the institution. By providing a unified platform for managing customer profiles, tracking service requests, and facilitating communication, the CRM aims to improve customer engagement and satisfaction through personalized and timely responses. Additionally, the application will enable data-driven decision-making by capturing and analyzing feedback and service trends, which helps the institution refine its offerings and adapt to evolving customer needs. Automated workflows and notifications will reduce administrative tasks, allowing staff to focus on higher-value activities and ensuring transparency in the service process. Ultimately, this CRM system will foster stronger customer relationships, boost operational efficiency, and support the institution's growth through scalable and secure data management

Team Members

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Objectives

Business Goals:

- **Enhance Customer Satisfaction:** Improve response times and provide personalized service to increase customer loyalty.
- **Boost Efficiency:** Automate tasks and streamline workflows to reduce costs and optimize staff productivity.
- **Increase Revenue:** Use data insights to identify new service opportunities for upselling and cross-selling.
- **Enable Data-Driven Decisions:** Analyze customer data to improve services and make informed strategic choices.

Specific Outcomes:

- **Centralized Customer Data**: All customer info in one place for quick access and accurate record-keeping.

- **Efficient Service Tracking**: Real-time tracking and automated reminders for service follow-ups, ensuring timely responses.
- **Streamlined Communication**: Built-in email/SMS for easy, direct contact with customers and automated updates.

Salesforce Key Features and Concepts Utilized

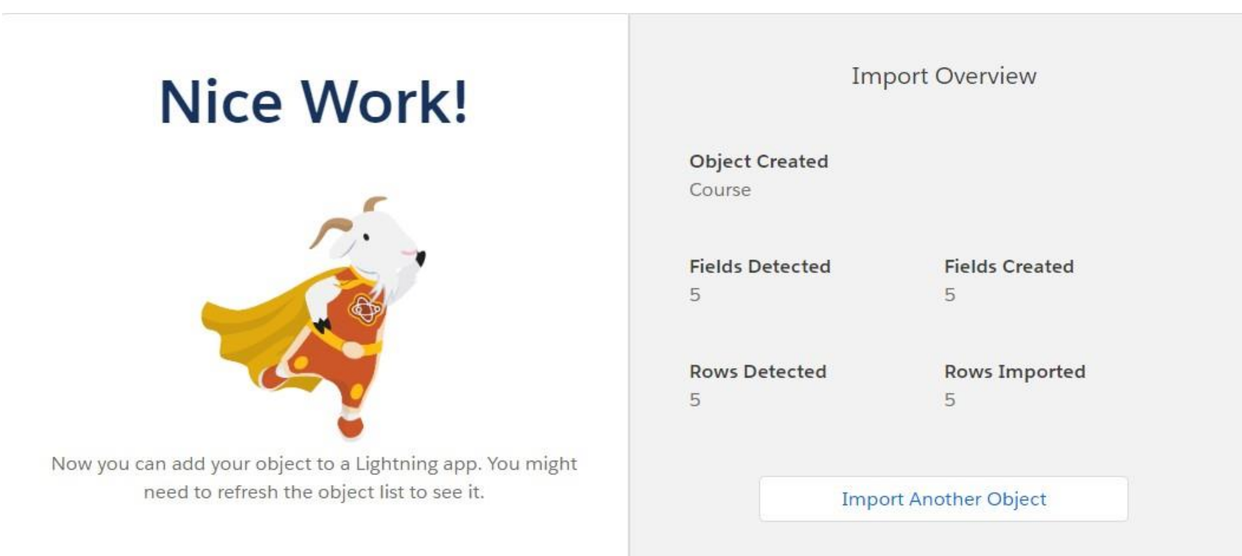
- **Objects and Fields**: Custom objects for "Consultant" and "Appointment"with relevant fields.
- **Picklist Fields**: Dynamic picklist for selecting consultants based on the"First Name" field.
- **Workflows and Approvals**: Automated workflows for appointmentapprovals and reminders.
- **Reports and Dashboards**: Real-time reporting to track service utilizationand consultant performance.

Detailed Steps to Solution Design

Create Objects from Spreadsheet:

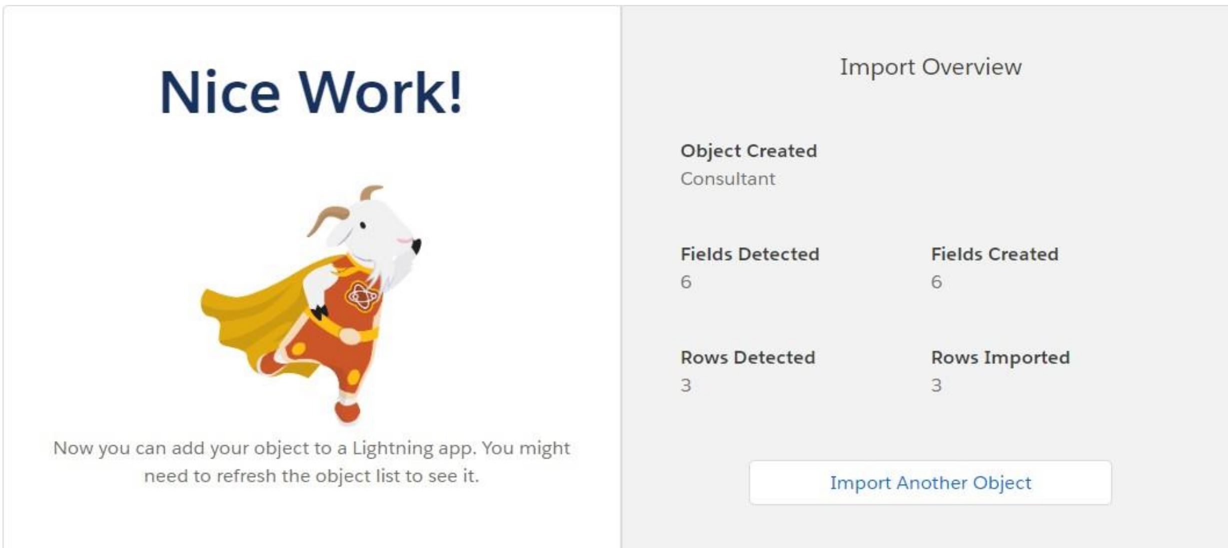
Create Course object:

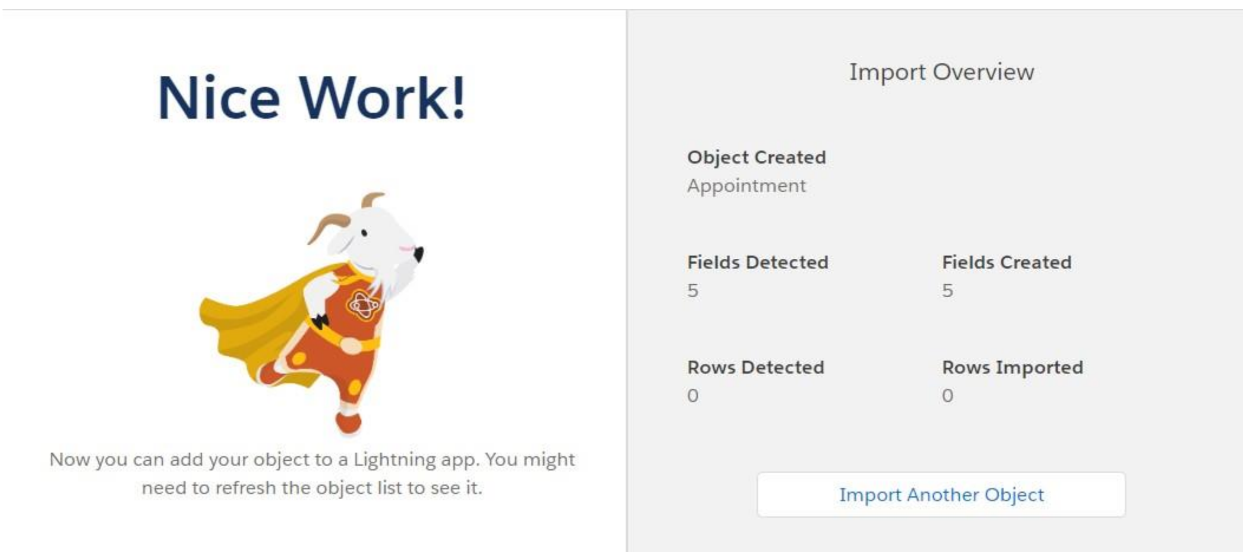
- Go to your object manager and and click on create object from spreadsheet
- Click on the link to get the spreadsheet, Course.
- After downloading, upload the file, map the fields and upload to create anobject.

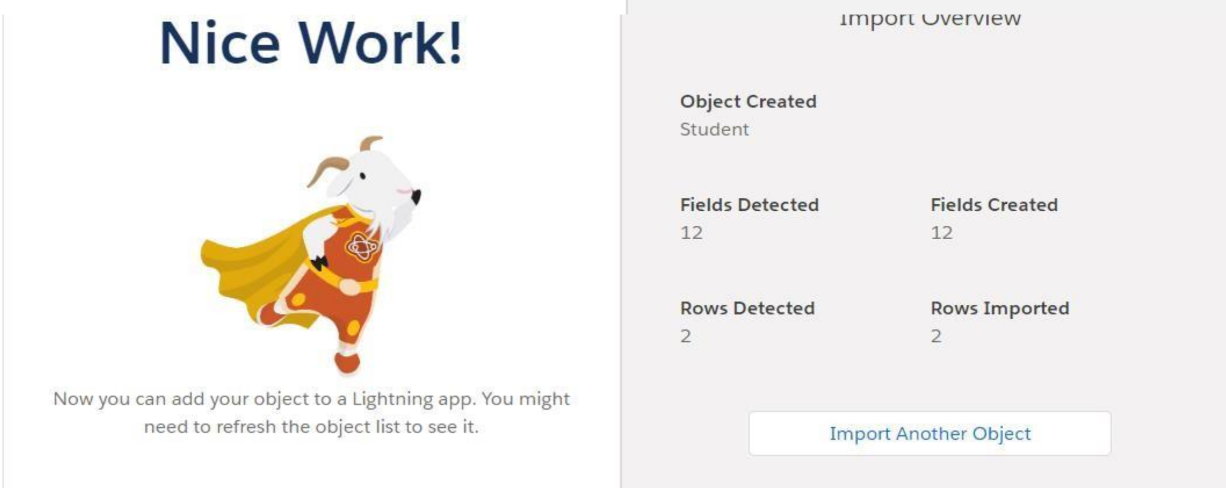


Create Remaining objects:

- Follow the steps which we have followed for course object creation.
- Use the following sheets for remaining objects.
    - Consultant
    - Appointment
    - Student





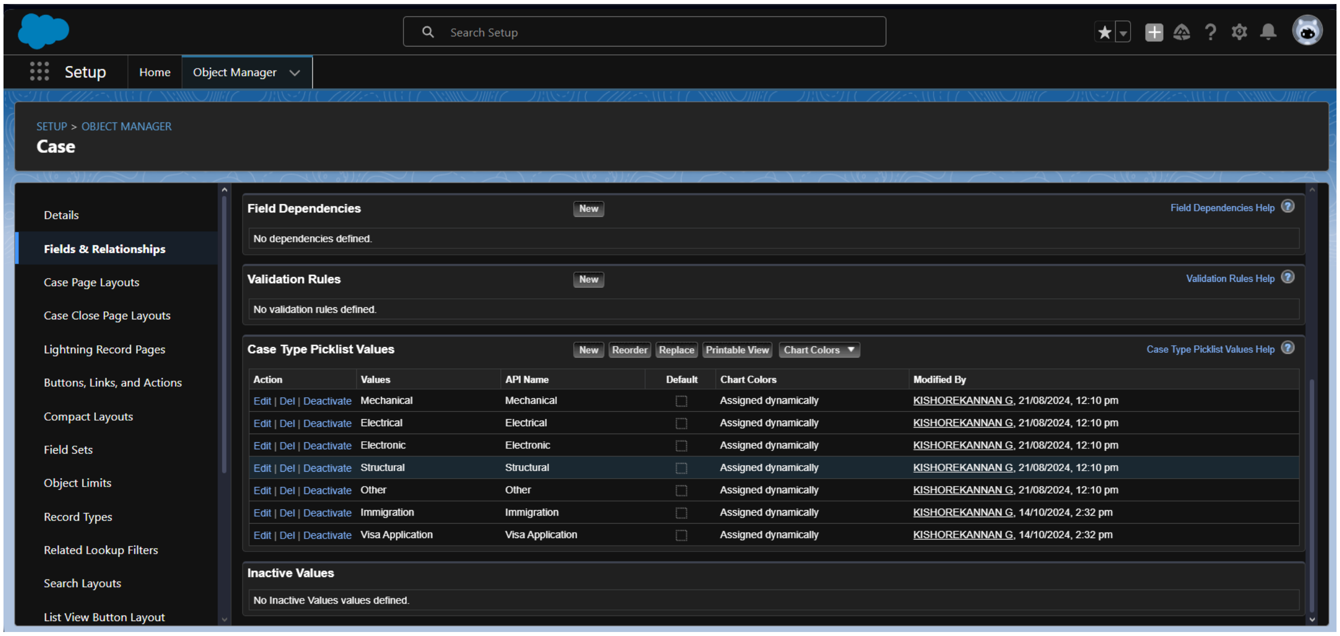


Create Relationship among the objects:

- Create lookup between appointment and student, appointment and consultant.
- Create an object to store the information student and course details withthe name Registration.
- Also create a lookup between student and case to store the studentqueries for immigration or visa application.
- The data model should be similar to the below Data Model with fields & relationships:
- Create tabs for the respective object.

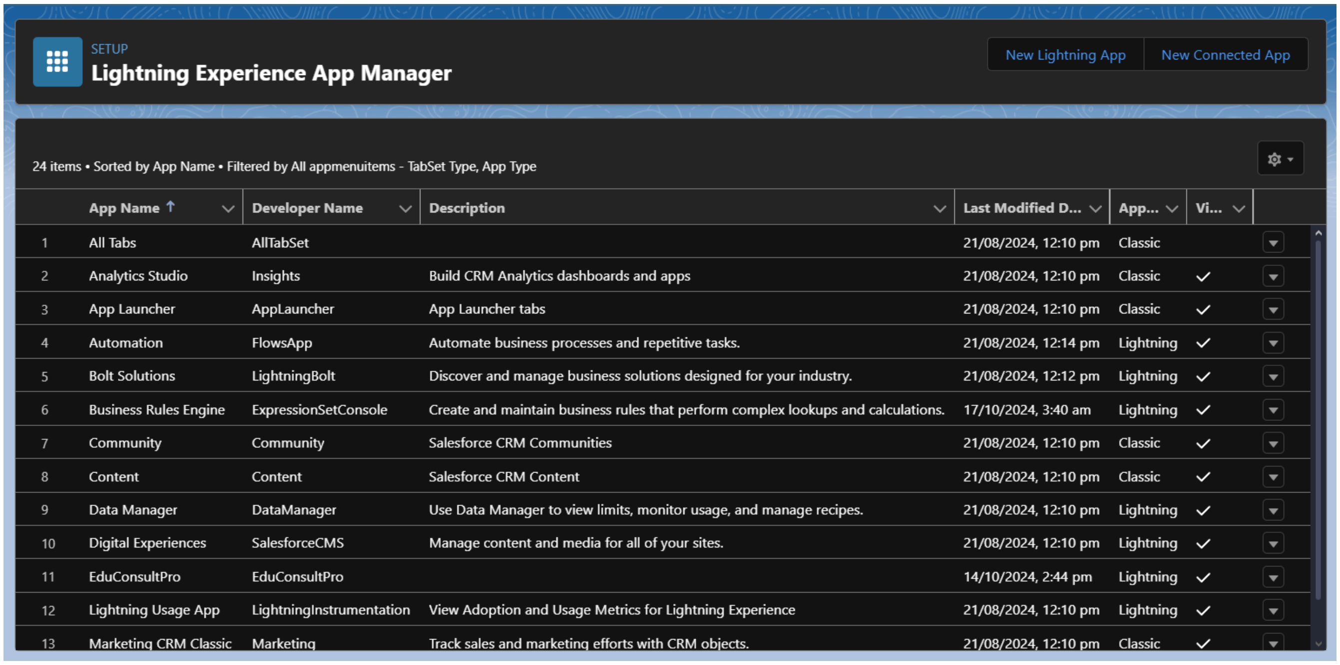
Configure the Case Object:

- Go to object manager, edit case object.
- Select the “Type” field and add the values in it.
    - Immigration
    - Visa Application
- Now Select the “Status” field and add the values in it.
- Open
- In-progress



Create a Lightning App:

- Go to Setup, search for the App Manager in quick find
- Click on New Lightning App
- Give app name as “EduConsultPro”, click Next, Next, Next
- Add Home, Students, Courses, Consultants, Appointments, Registrations,and Cases from the Available Items to Selected Items.
- Add “System Administrator” profile from Available Profiles to Selected Profiles, click Save & Finish.


SETUP
Lightning Experience App Manager
New Lightning App | New Connected App

24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name	Developer Name	Description	Last Modified D...	App...	Vi...
1	All Tabs	AllTabSet		21/08/2024, 12:10 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	21/08/2024, 12:10 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	21/08/2024, 12:10 pm	Classic	✓
4	Automation	FlowsApp	Automate business processes and repetitive tasks.	21/08/2024, 12:14 pm	Lightning	✓
5	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	21/08/2024, 12:12 pm	Lightning	✓
6	Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform complex lookups and calculations.	17/10/2024, 3:40 am	Lightning	✓
7	Community	Community	Salesforce CRM Communities	21/08/2024, 12:10 pm	Classic	✓
8	Content	Content	Salesforce CRM Content	21/08/2024, 12:10 pm	Classic	✓
9	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	21/08/2024, 12:10 pm	Lightning	✓
10	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	21/08/2024, 12:10 pm	Lightning	✓
11	EduConsultPro	EduConsultPro		14/10/2024, 2:44 pm	Lightning	✓
12	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	21/08/2024, 12:10 pm	Lightning	✓
13	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	21/08/2024, 12:10 pm	Classic	✓

Create a ScreenFlow for Student Admission Application process:**Add**

Screen Element:

- From Setup, enter Flow Builder in quick find, select new flow --> ScreenFlow.
- Add a Screen element.
- In the Screen Properties pane, for Label, enter “Student Info”.
- Click on Fields, click on the record variable input and create a new Resource(StudentRecordRes) to display all the fields which are in the student object. Drag all the fields which are needed to add on the screeninorder to collect the student information.

Create Student Record using Create Element:

- Add a Create element after Student Info Screen Element, Label it as“Create Student Record.”
- Select “one” under How many records to Create, and select “use all valuesfrom a record” under How to Set the record fields.
- Select the record variable resource(StudentRecordRes) which we havecreated in the Student Info screen element, under Create a record fromthese values.

Add Screen Element:

- Add a Screen Element after Create Student Record Element and label it asCourse Screen.

- Add a picklist component from the left side panel label it as “Select
    - Course”, under choices type “IELTS” and enter. This creates a variable with the name IELTS.
- Repeat the same for GRE, GMAT, Duolingo, TOEFL.

Add Decision Element:

- Add a Decision Element after Select Course Screen Element, label it as Selecting Course.
- Under outcome label it as “Selected IELTS” and write the condition such asbelow:
    - Resource : Select_Course (Screen Component from Select Course Screen Element)
    - Operator : Equals
    - Value : IELTS (Choice Variable from Select Course Screen Element)
- Click on the “+” icon and Repeat the above step for other options mentioned as below:
    - GRE
    - GMAT
    - DuoLingo
    - TOEFL
- Click Done.

Add GET Record Element:

- Add a GET Record Element after Decision Element, under the IELTS pathand label it as “Get IELTS Rec”.
- Select Object : Course
    - Condition Requirement : All Conditions are Met(AND)

      Field : Course Name
    - Operator : Equals
    - Value : {!Select_Course}
- Repeat the above steps for the GRE, GMAT, TOEFL, DuoLingo paths

Create Registration Record using Create Records Element:

- Add a Create element after the Get IELTS Rec element and label it as“Create IELTS Registration Rec”.
- Select “one” under How many records to Create, and select “Use separate resources, and literal values” under How to Set the record fields.

- Select Object : Registration
  - Field : Course_Name__c
- Value : {!Get_IELTS_Rec.Id}
- Field : Student_Name________c
- Value : {!StudentRecordRes.Id}
- Repeat the steps above steps for the GRE, GMAT, TOEFL, DuoLingopaths.

Create Email Text Template Variables for email body and subject:

- Click on the toggle toolbox on the left corner, click “New Resource”, thenselect “Text Template” as Resource Type.
- Give the API name as “StuRegistrationEmailTextTempBody”, select “viewas plain text” and paste the below text in body.

  - “Dear {!StudentRecordRes.Name},

  - Congratulations and welcome to EduConsultantPro!

  - We are delighted to inform you that your registration on our platform has been successfully completed. You are now part of our esteemed community dedicated to empowering students like you to achieve their educational and immigration aspirations.

  - At EduConsultantPro, we understand the importance of your academic and career goals, and we are committed to providing you with the highest level of support and guidance throughout your journey.
  - Here are a few key points to help you get started:
  - Explore Our Resources : Take some time to explore the wide range of resources, tools, and services available on the EduConsultantPro platform. From educational insights to immigration advice, we offer comprehensive support tailored to your needs.
  - Connect with Our Consultants : Our team of experienced consultants is here to assist you at every stage of your educational and immigration endeavors. Don't hesitate to reach out to us with any questions, concerns,or inquiries you may have. We're here to help!
  - Stay Updated : Keep an eye on your inbox for important updates, announcements, and exclusive opportunities from EduConsultantPro. We'll ensure that you're informed about the latest developments and relevant
  - information to support your journey.

    - Engage with the Community : Join our vibrant community of students, professionals, and experts who share your passion for education and global opportunities. Connect with like-minded individuals, participate in discussions, and expand your network.

    - Once again, congratulations on taking this important step towards realizing your academic and career aspirations. We are thrilled to have you as part of the EduConsultantPro family and look forward to supporting you on your journey to success.
    - If you have any questions or need assistance, please don't hesitate tocontact us.

- Thank you."
- Click Done.

Add an Action Element:

- Add an Action Element after all the Decision paths, label it as "Send Emailto Student".
- Under "Set input values for selected action", include body, Recipient Address List and Subject.
- For input Body : {!StuRegistrationEmailTextTempBody}, Recipient Address List : {!StudentRecordRes.Email c},Subject : {!StuRegistrationEmailTextTempSub}.

Add Screen Element:

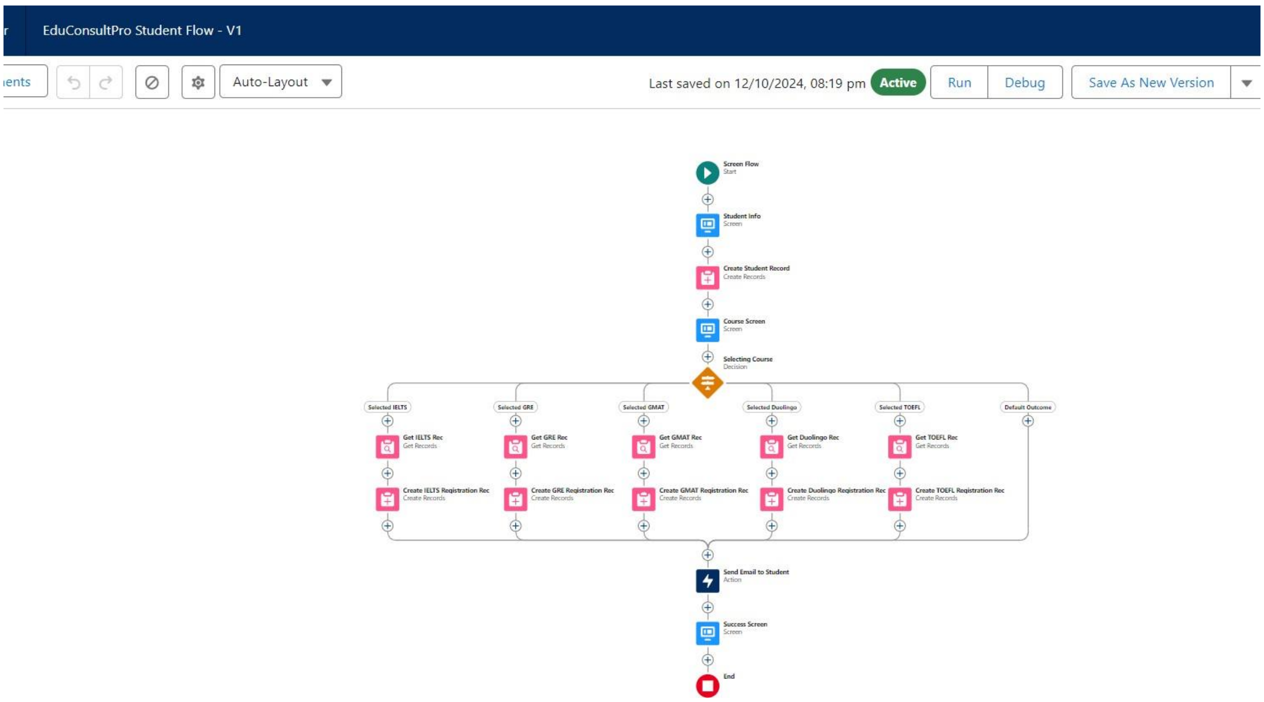
- Add a Screen Element after the Send Email to Student Action Element,label it as Success Screen.
- From the left side panel search for the Display text component and drag itto the main panel, label it as "SuccessMessage".
- Paste the below in the Resource picker box."Dear

  {!StudentRecordRes.Name},

    - Congratulations and welcome to EduConsultantPro!

    - We are delighted to inform you that your registration on our platform has been successfully completed. You are now part of our esteemed community dedicated to empowering students like you to achieve their educational and immigration aspirations.

    - Your Registration details have been sent through mail kindly check it once.
    - Thank you.”
- Click Done.
- Save the flow and name it as “EduConsultPro Student Flow”. Your flow willlook as shown below:



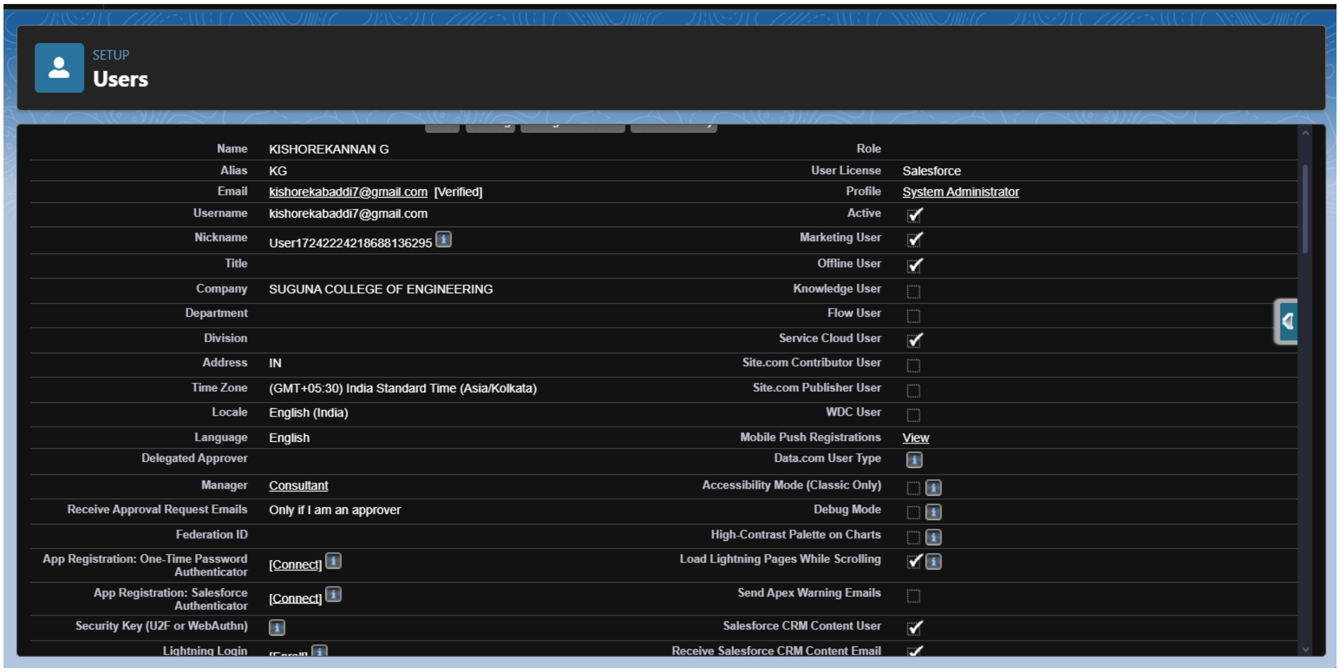
Create Users:

User:

- Go to Setup --> Administration --> Users --> New User
- LastName : Consultant
- License : Salesforce Platform
- Profile : Standard Platform User
- Fill all the mandatory fields & Save.

Configure the User Settings:

- Go to Setup --> Administration --> Users --> click Edit next to your name
- Scroll down to bottom, under Approver Settings, Select “Consultant” the Manager Field.
- Click Save



Create an Approval Process for Property Object:

Create an Email Template:

- From Setup, enter Templates in the Quick Find box, and then select Lightning Email Templates, toggle on
- go to app launcher, search for “Email Templates”, Create a new folder withthe desired name.
- Then create a new email template, select the folder which we have createdin the previous steps, enter the below text in the HTML Value and Save it as "Submission Template".

  - "Dear {{{Appointment________________c.Student_Name___c}}},

  - I hope this email finds you well. I am writing to confirm the details of our upcoming appointment scheduled for
  - {{{Appointment________________________c.Appointment_DateTime_____c}}} regarding
  - {{{Appointment______________c.PurposeTopic_____c}}}.

  - Appointment Details:
  - Appointment No : {{{Appointment_____c.Name}}},
  - Student Name : {{{Appointment__c.Student_Name ___________________________c}}},Consultant Name : {{{Appointment___________c.Consultant______c}}},
  - Date & Time : {{{Appointment _________________________c.Appointment_DateTime____c}}},

- Purpose : {{{Appointment_______________c.PurposeTopic__c}}}

- I want to assure you that I am looking forward to our meeting and am fully prepared to address any questions or concerns you may have regarding
- {{{Appointment______________c.PurposeTopic_____c}}}. Your success and satisfaction aremy top priorities, and I am committed to providing you with the guidance and support you need.

- If you have any specific topics or questions you would like to discuss during our appointment, please feel free to share them with me in advance.This will help ensure that our time together is as productive and beneficial as possible.

- If for any reason you need to reschedule or cancel our appointment, please notify me at your earliest convenience so that we can make alternative arrangements.

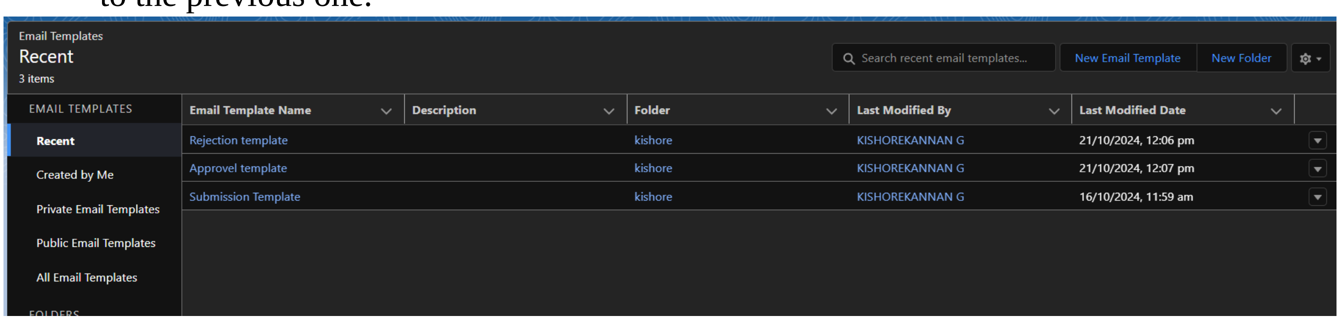
- Once again, thank you for choosing to work with me on this matter. I am confident that our collaboration will lead to positive outcomes and progress toward your goals.

- If you have any questions or require further information before ourscheduled appointment, please don't hesitate to reach out to me.

- Looking forward to our

  meeting.Best regards,
- {{{Recipient.Name}}},
- EduConsultantPro"

  - Create two more Email templates for Approval and Rejection of Requestsimilar to the previous one.

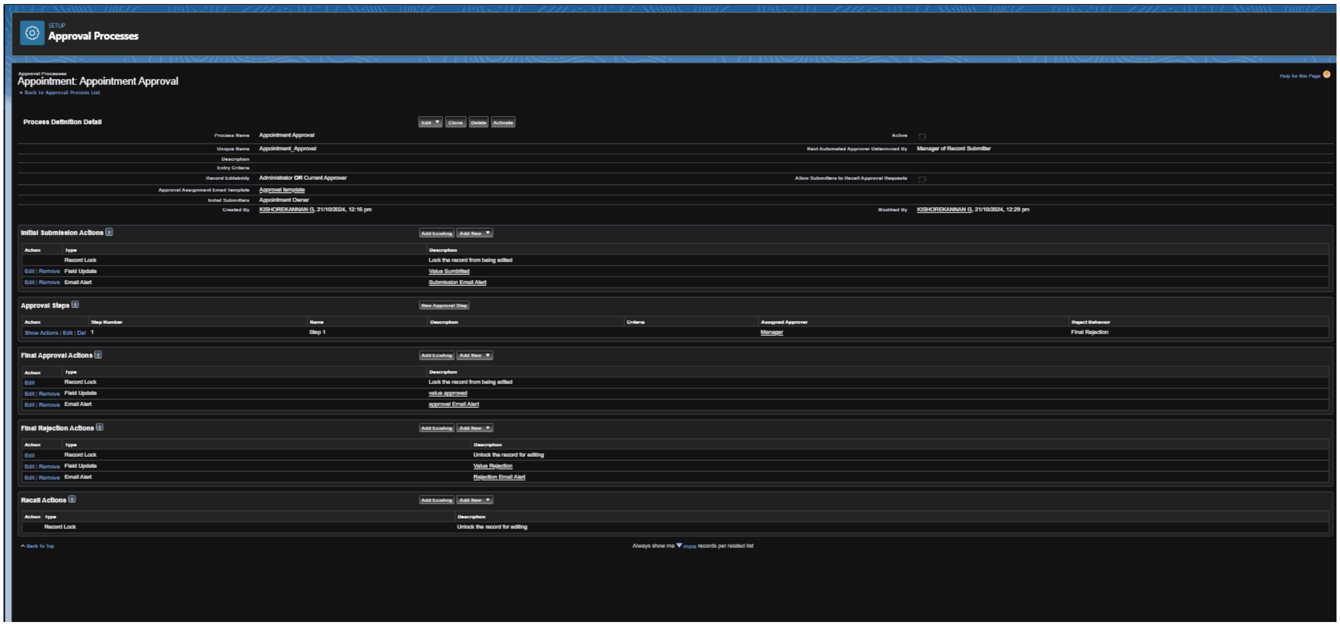


Create an Approval Process:

- From Setup, enter Approval in the Quick Find box, and then select Approval Processes.
- In Manage Approval Processes For, select Appointment.
- Click Create New Approval Process --> Use Jump Start Wizard.
- Configure the approval process.
- Process Name - Appointment Approval, Under Select Approver, Select Manager for the option : “Automatically assign an approver using a standard or custom hierarchy field.”
- Click next and “Next Automated Approver Determined By” --> Select Manager.
- From Record Editability Properties --> Click on Administrators OR the currently assigned approver can edit records during the approval process.
- Save the approval process.
- Click View Approval Process Detail Page.
- Under Initial Submission Actions, click Add New --> Field Update, and configure it with these values

Field	**Value**
Name	Submitted
Field to Update	Appointment: Status
A Specific value	Pending

- click Add New --> Email Alert, and configure it with these values.
  Description : Submission Email Alert
    - Unique Name : Auto Populates
    - Email Template : Submission TemplateRecipient Type : Select your Name
- Repeat the Last Two Steps for Final Approval and Final Rejection actions



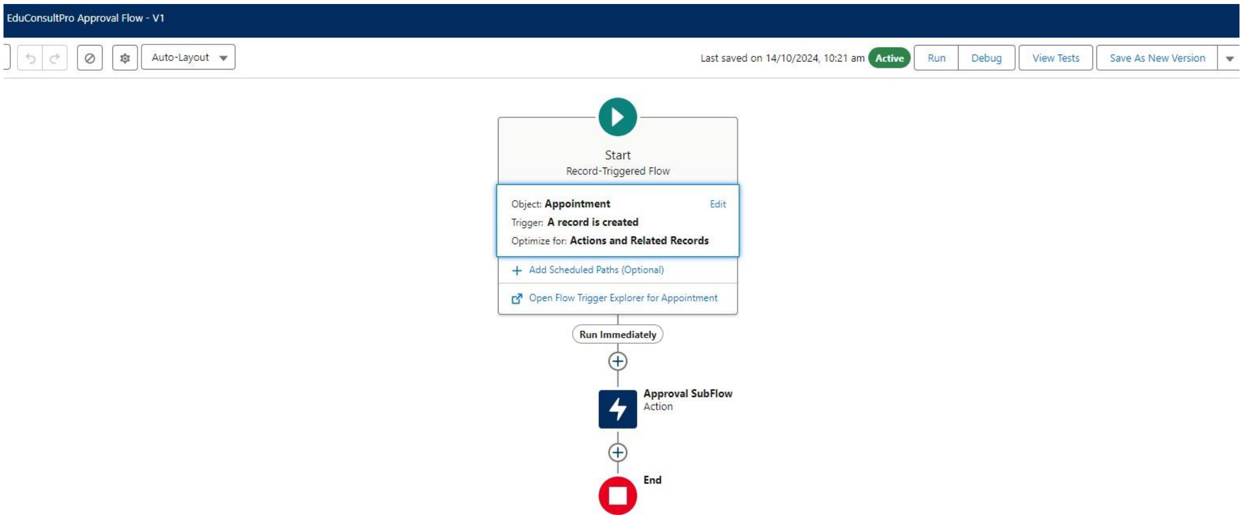
Create a Record Triggered Flow:

Configure the Start Element:

- From Setup, enter Flows in the Quick Find box, then select Flows.
- Click New Flow.
- Select Record-Triggered Flow.
- Click Create. The Configure Start window opens.
- For Object, select Appointment.
- For Trigger the Flow When, select A record is created.

Add an Action Element:

- Add an Action element after the Start Element and Select the Submit for approval action, label it as "Approval SubFlow".
- Set the RecordId to "{!$Record.Id}".
- Save the Flow, label it as "EduConsultPro Approval Flow and Click on Activate.



Create a ScreenFlow for Existing Student to Book an Appointment:

Add Screen Element:

- From Setup, enter Flow Builder in quick find, select new flow ? ScreenFlow.
- Add a Screen element.
- In the Screen Properties pane, for Label, enter “Get Student Info”.
- Add two Text components from the left side panel. Give the Label’s as follows:
    - 1st Text Component Label : Enter Student

      Name2nd Text Component Label : Enter

      Student Email
- Click on Done.

Add GET Record Element:

- Add a GET Record Element after Decision Element, under the IELTS pathand label it as “Get Rec”.
- Select Object : Student
    - Condition Requirement : All Conditions are Met(AND)
    - Field : Student Name
      Operator : Equals
        - Value : {!Enter_Student_Name}
    - Field : Email__c
      Operator : Equals
        - Value : {!Enter_Student_Email}

Add Screen Element:

- From Setup, enter Flow Builder in quick find, select new flow ? ScreenFlow.
- Add a Screen element.
- In the Screen Properties pane, for Label, enter “Display Student Details”.
- Add Display Text components from the left side panel. Give the API nameas “Display_details”, under Resource picker add the below text:
  - Name : {!Get_Rec.Name},
  - First Name : {!Get_Rec.First_Name c},Last Name : {!Get_Rec.Last_Name c}, Email : {!Get_Rec.Email_c},
  - Phone : {!Get_Rec.Phone__c}, Gender : {!Get_Rec.Gender__________c}, City : {!Get_Rec.City___c},
  - Address : {!Get_Rec.Address__c},
- Add a radio button component from the left side panel,label : How may Ihelp you??
- Click on Add Choice ? type “Book an Appointment” in the input field ? click Create Book an Appointment choice.
- Repeat the above step and create an “Immigration Case” choice resource.

Add Decision Element:

- Add a Decision Element after Select Display Student Details Element,label it as “Appointment or Case”.
- Under outcome label it as “Appointment” and write the condition such asbelow:
- Resource : {!How_may_I_Help_you}Operator :

  Equals
- Value : {!Book_an_Appointment}
- Click on the “+” icon and Repeat the above step for Case options mentioned.

Add Screen Element:

- Add a Screen element after the Decision Element and label it as “Appointment Booking Screen".

- Click on Fields, click on the record variable input and create a new Resource (AppointmentRecordRes) to display all the fields which are in theAppointment object.
- Drag all the fields which are needed to add on the screen inorder to collectthe student information.
- Click on Done.

Add GET Record Element:

- Add a GET Record Element after Decision Element, under the Appointment path and label it as “Get Consultant Rec”.
- Select Object : Consultant
  - Condition Requirement : All Conditions are Met(AND) Field : Name
  - Operator : Equals
  - Value : {!AppointmentRecordRes.Consultant_Name_c}

Create Appointment Record using Create Records Element:

- Add a Create element after the Get Consultant Rec element and label it as“Create Appointment”.
- Select “one” under How many records to Create, and select “Use separate resources, and literal values” under How to Set the record fields.
- 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.Notesc}
      - Field : PurposeTopicc
        - Value : {!AppointmentRecordRes.PurposeTopic_c}
      - Field : Student_Name_____c
        - Value : {!Get_Rec.Id}

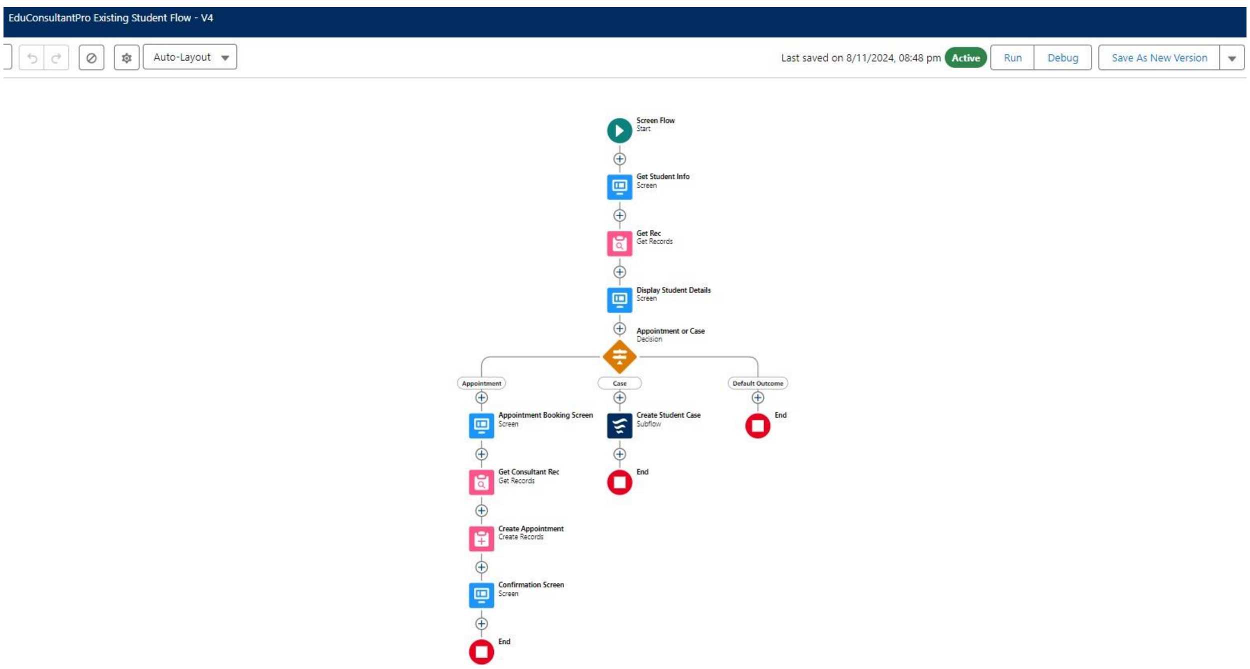
Add Screen Element:

- Add a Screen Element after the Send Email to Student Action Element,label it as “Confirmation Screen”.
- From the left side panel search for the Display text component and drag itto the main panel, label it as “Appointment_Confirmation”.
- Paste the below in the Resource picker box.

    - Consultant Name : {!Get_Consultant_Rec.Name},
    - Date & Time : {!AppointmentRecordRes.Appointment_DateTime__________________________________c},Notes : {!AppointmentRecordRes.Notes_______c},
- Click Done.

Add an SubFlow Element:

- Add a subflow element after the Start Element and search and Select for“Create a Case”, label it as “Create Student Case”.
- Save the flow and label it as “EduConsultantPro Existing Student Flow”.



Create a ScreenFlow to Combine all the flows at one place:

Add Screen Element:

- Add a Screen Element and label it as Welcome Screen.
- From the left side panel search for the Display text component and drag itto the main panel, label it as “SuccessMessage”.
- Paste the below in the Resource picker box.

  “Welcome to EduConsultantPro

- your premier destination for education and immigration solutions!
- At EduConsultantPro, we understand that embarking on educational or
- immigration journeys can be both exhilarating and daunting. That's why we're

- here to guide you every step of the way with expertise, dedication, andpersonalized support.

- Whether you're seeking to pursue your academic dreams abroad, navigate
- the complexities of immigration processes, or enhance your professional skills through international opportunities, EduConsultantPro is your trusted partner.

- Our team of seasoned consultants is committed to understanding your unique aspirations and crafting tailored strategies to help you achieve your goals
- efficiently and effectively. From selecting the right educational institution to navigating visa procedures, our comprehensive services cover all aspects ofyour journey.

- At EduConsultantPro, we believe in fostering inclusive communities and unlocking the full potential of every individual. With our unwavering commitment to excellence and integrity, we strive to make your experiencewith us seamless and rewarding.

- Welcome to EduConsultantPro – where your aspirations meet our expertise,and together, we pave the path to success. Let's embark on this transformative journey together!”

- Click Done

Add Screen Element:

- Add a Screen Element after the Welcome Screen Element, label it as “Existing or New Student Confirmation Screen”.
- Add a radio button component from the left side panel,
- label : Are you a Existing Student
- Click on Add Choice --> type “Yes” in the input field --> click Create Yes choice.
- Repeat the above step and create an “No” choice resource.
- Click Done

Add Decision Element:

- Add a Decision Element after Existing or New Student ConfirmationScreen Element, label it as “Decision 1”.
- Under outcome label it as “If Existing Student” and write the condition suchas below:

    - Resource : {!Are_you_a_Existing_Student}

      Operator : Equals

- Value : {!Yes}

- Click on the “+” icon and Repeat the above step for No options mentioned.

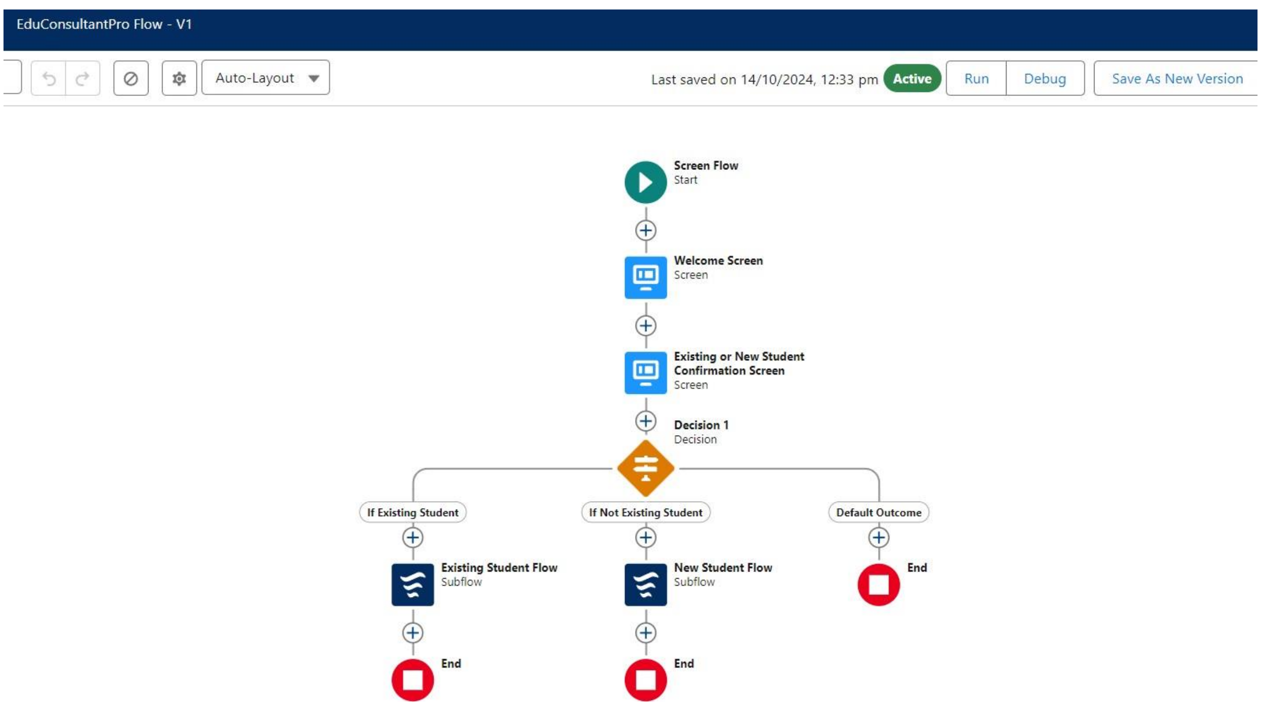
Add an SubFlow Element:

- Add a subflow element after the Decision 1 Element on the if Existing Student path and search and Select for “EduConsultantPro Existing Student Flow ", label it as “Existing Student Flow”.
- Save the flow and label it as “EduConsultantPro Existing Student Flow”.
- Click Done

Add an SubFlow Element:

- Add a subflow element after the Decision 1 Element on the if Not an Existing Student path and search and Select for “EduConsultantPro Student Flow ", label it as “New Student Flow”.

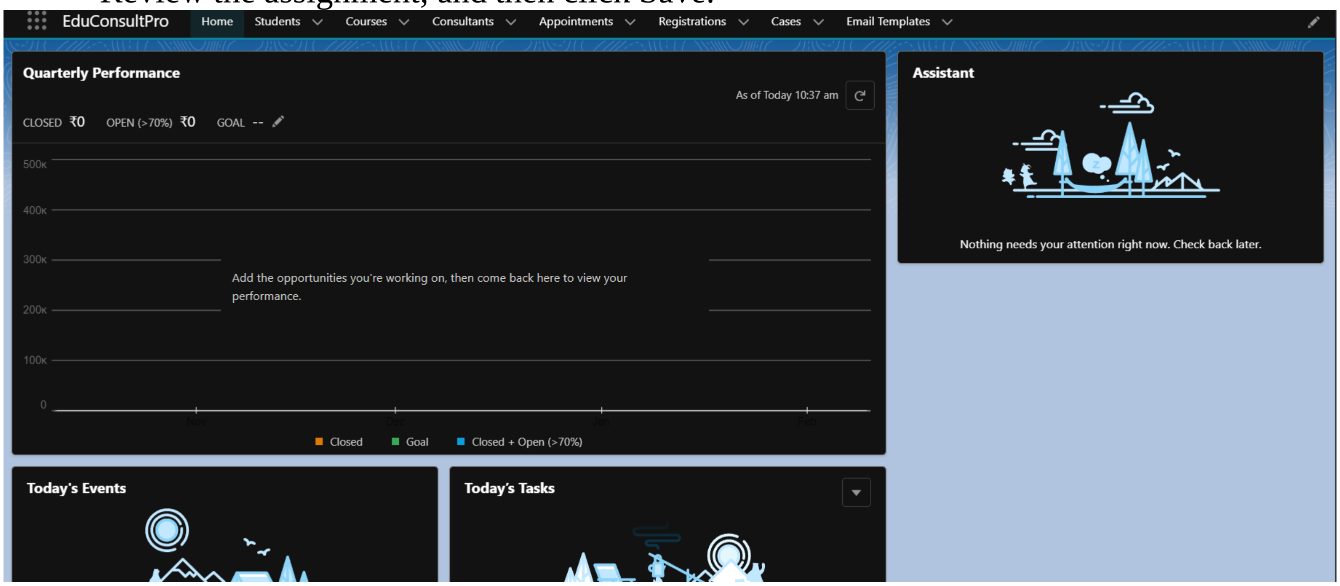
- Save the flow and label it as “EduConsultantPro Existing Student Flow”.
- Click Done.
- Save the flow and label it as “EduConsultPro Flow”.



Create a lightning app page:

Create a lightning app page:

- From Setup, enter App Builder in the Quick Find box, then click LightningApp Builder.
- Click New, select Home Page, then click Next.
- Step through the wizard and name the page “EduConsultPro Home Page”,select the Standard Home Page template, and then click Done.
- Drag the Flow component to the top-right region.
- Search for the “EduConsultantPro Flow” and click Save.
- Click Activate, Click App and Profile, then click Assign to Apps and Profiles.
- Select the Sales app, then click Next.
- Scroll down the list of profiles and select System Administrator, then clickNext.
- Review the assignment, and then click Save.



Testing and Validation

User Interface Testing:

- Testing the functionality of picklists, form submissions, and dynamic field updates.

Key Scenarios Addressed by Salesforce in the Implementation Project

- **Customer Data Management:** Centralized storage for accurate and accessible customer profiles.
- **Service Request Management:** Efficient tracking of service requests with automated follow-ups.
- **Sales & Opportunity Management:** Streamlined tracking of sales leads, opportunities, and pipelines.
- **Customer Communication:** Integrated tools for timely, personalized communication via email, SMS, and chat.

Conclusion

Summary of Achievements:

CRM application to manage services offered by an institution provides significant benefits, including improved customer data management, efficient service tracking, streamlined communication, and enhanced reporting capabilities. By automating routine tasks and ensuring a personalized, timely service experience, the institution can improve customer satisfaction, retention, and overall operational efficiency. This results in a more organized, scalable, and secure platform that can grow alongside the institution, leading to long-term success and a competitive edge in the market.