

## Project Title: Smart Mall CRM – A Comprehensive Smart Institution Management

### 1. Project Overview

The Smart Institution CRM is a robust service management application built on the Salesforce platform to address the needs of educational institutions. The solution centralizes the management of student services, faculty services, and alumni engagement, improving communication, tracking, and operational efficiency. It provides tools to automate workflows, generate insightful reports, and enhance the overall user experience for students, faculty, and administrators. The system aims to optimize service delivery, automate routine processes, and support data-driven decision-making for educational institutions.

### 2. Objectives

#### Business Goals:

Increase student and faculty satisfaction through efficient service request management. Improve operational efficiency by automating service request workflows and status tracking. Provide real-time insights through detailed reports and dashboards to drive decision-making.

Enhance communication through automated notifications and reminders

#### Other objectives include:

- Automate notifications for overdue requests, upcoming deadlines, and service completions.
- Enable student engagement with self-service portals for tracking and submitting service requests.
- Strengthen alumni relations with personalized event invites, newsletters, and donation requests.

#### Specific Outcomes:

Custom objects like Service Requests, Service Contracts, and Alumni Engagement will track requests, manage agreements, and monitor alumni interactions. Process automation will streamline service request workflows, approvals, reminders, and automated email communications. Security will be maintained through role-based access, data encryption, and integration with third-party systems for enhanced functionality and alumni engagement.

### 3. Salesforce Key Features and Concepts Utilized

- Custom Objects: Create and manage custom objects like Service Requests, Service Contracts, and Alumni Engagement to track all aspects of institution services.
- Process Automation: Leverage Workflow Rules, Process Builder, and Flows to automate notifications, approvals, and reminders, enhancing operational efficiency.
- Reports & Dashboards: Design real-time dashboards for service status, request analytics, and customer satisfaction metrics to help administrators make data-driven decisions.

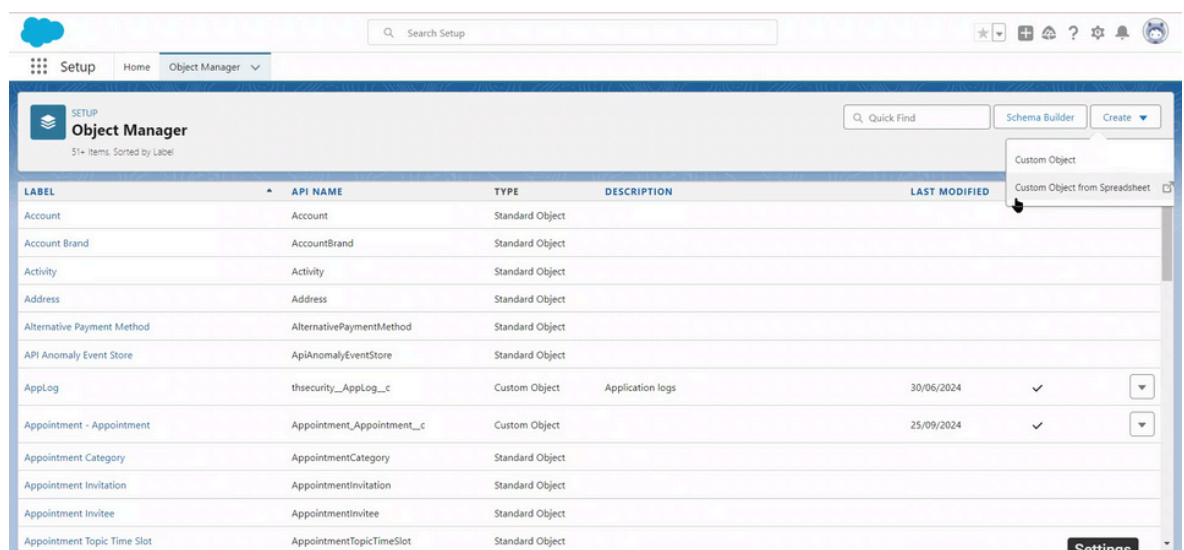
## 4. Detailed Steps to Solution Design

### Data Models:

Custom objects for Students, Courses, Service Requests, and Alumni are designed to store and manage critical information related to the services offered by the institution.

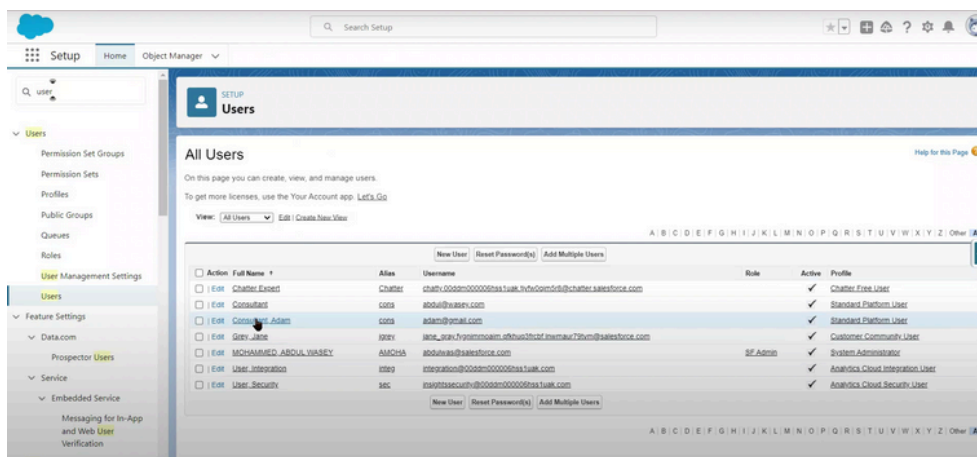
### User Interface:

Customized Lightning pages to streamline the management experience, with clear management user interface



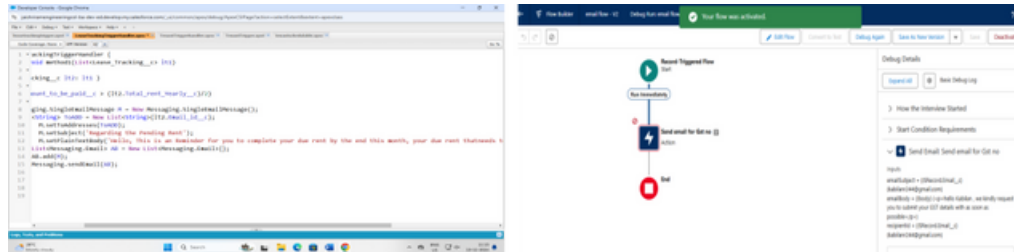
### Business Logic:

Salesforce Flows and Triggers ensure automated reminders and notifications for institution's activities



## 5. Testing and Validation

All Apex Classes and Triggers undergo thorough unit testing to ensure functional accuracy.



### User Interface Testing:

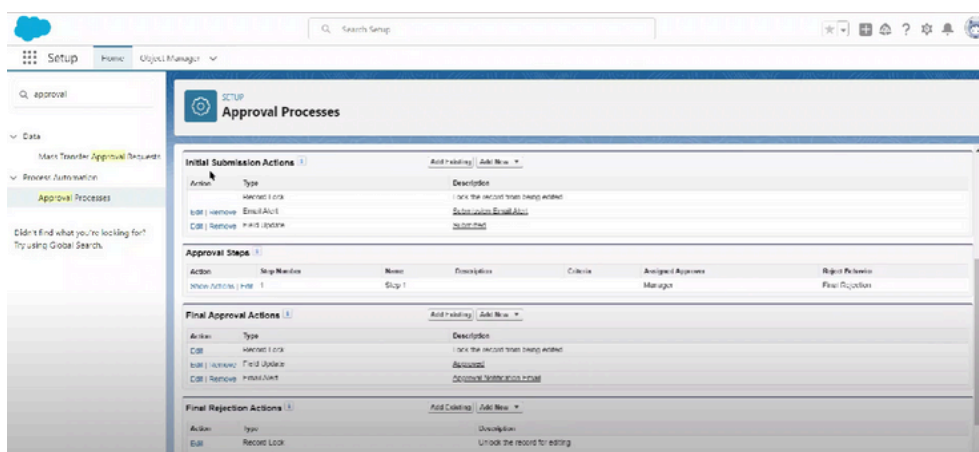
User acceptance testing (UAT) is conducted to ensure that mall managers and tenants can easily navigate and use the application.

## 6. Key Scenarios Addressed by Salesforce in the Implementation

### Automation – Automated notifications for institutions



Institution Management – Easy access to details, agreements, and communication history to improve management capability.



## 7. Conclusion

The Smart Institution CRM delivers a comprehensive solution to enhance the management of services across educational institutions. Built on Salesforce, it improves operational efficiency by automating service requests, streamlining communication, and providing valuable data insights. Custom objects track key services, while process automation ensures timely notifications and smooth request handling. With real-time performance tracking and role-based access, the CRM fosters better stakeholder engagement and satisfaction. Ultimately, this solution empowers administrators to make informed decisions, enhancing the overall service delivery and long-term success of the institution.