

# **ENGAGE 360**

BY

ANNAM OMKAR VENKAT RAMAIAH

Email: 2111CS010346@mallareddyuniversity.ac.in

## **ABSTRACT**

Engage 360 is a comprehensive Customer Management Relationship (CMR) application designed to streamline the management of services offered by institutions. The platform aims to enhance customer satisfaction, improve service delivery, and increase operational efficiency. By integrating advanced technologies and user-centric design principles, the CMR application provides a seamless experience for both administrators and service recipients.

This project focuses on the implementation of Salesforce CRM within Organisation to streamline and enhance sales, customer service, and marketing operations. Aiming to consolidate customer information, automate workflows, and improve data-driven decision-making, this project addresses several operational challenges currently faced by the organization, including fragmented customer data, time-intensive manual processes, and limited reporting capabilities.

The project leverages Salesforce's core modules—Sales Cloud, Service Cloud, and Marketing Cloud—to create a unified, scalable solution that allows for better collaboration across departments, real-time insights into student interactions, and increased efficiency in student engagement. Key features include automated student information tracking, customizable dashboards for performance monitoring, integration with existing organisation systems, and an enhanced support system for student inquiries.

Through this implementation, Organisation expects to improve student satisfaction, accelerate sales cycles, and boost overall productivity. The project's phased approach, incorporating requirements gathering, system customization, user training, and data migration, ensures minimal disruption during deployment and supports a smooth transition for all users. This Salesforce implementation aims to not only support current student needs but also lay the groundwork for long-term growth and scalability within the organisation.

# INDEX PAGE

<b>Topics</b>	<b>Page No</b>
Introduction	
<b>1) Salesforce Account Creation</b>	<b>4</b>
■ Creating Developer Account	
■ Activate Account	
<b>2) Object Creation</b>	<b>5-15</b>
■ Create Course Object	
■ Create Consultant Object	
■ Create Student Object	
■ Create Appointment Object	
<b>3) Tabs</b>	<b>16</b>
■ Creating Custom Tabs	
<b>4) The Lightning App</b>	<b>17-20</b>
■ Create a Lightning App	
<b>5) Screen Flows</b>	<b>21-38</b>
■ Create ScreenFlow for Student Admission Application process	
■ Create ScreenFlow for Existing Student to Book an Appointment	
■ Create a ScreenFlow to Combine all the flows at one place	
<b>6) Dashboards</b>	<b>39-40</b>
■ Dashboards of the objects created in the app.	
<b>7)Conclusion</b>	<b>41</b>

# INTRODUCTION

## TASK-1

### Creating Salesforce Developer Org and Account Activation

- Creating Salesforce Developer Org

#### 1. Visit Salesforce Developer Site:

- Go to the [Salesforce Developer website](#).
- Click on "Sign Up" or "Sign Up for Free".

#### 2. Fill Out the Registration Form:

- Enter your details such as name, company, email, role, and country.
- Choose a unique username (it must be in the form of an email address, but does not have to be a real email).

#### 3. Activate the Account:

- Salesforce will send a confirmation email to the provided email address.
- Open the email and click on the confirmation link to activate your account.

#### 4. Set Up Your Password:

- After clicking the confirmation link, you will be prompted to set up a password and a security question.
- Complete the setup and click "Save".

#### 5. Login to Developer Org:

- Go back to the Salesforce Developer website and log in using your username and password.
- Account Activation

#### 1. Login to Salesforce:

- Use your credentials to log in to the Salesforce Developer Org.

## **TASK-2**

### **Object Creation**

- Create Course Object

Prepare the Course CSV File

1. Download the Spreadsheet:

- Download the provided spreadsheet and open it in a spreadsheet editor like Microsoft Excel or Google Sheets.

2. Save the File:

- Save the file as 'Course.csv'.

2. Log into Salesforce and Access Setup

1. Log In:

- Go to your Salesforce Developer Org and log in with your credentials.

2. Access Setup:

- Click on the gear icon (⚙️) in the upper right corner.
- Select "Setup" from the dropdown menu.

3. Navigate to Object Manager:

- Click on the "Object Manager" tab at the top of the Setup screen.

3. Create Custom Object from Spreadsheet

1. Click Create:

- In the Object Manager, click on the "Create" button.

2. Select Custom Object from Spreadsheet:

- From the dropdown menu, select "Custom Object from Spreadsheet."

3. Login with Salesforce:

- Click "Login With Salesforce."

#### 4. Enter Salesforce Credentials:

- Enter the username and password for your Salesforce account.
- Click "Log In."

#### 5. Grant Permissions:

- Click "Allow" to grant the necessary permissions.

#### 4. Upload the CSV File

##### 1. Click Upload:

- Click the "Upload" button.

##### 2. Select Course.csv File:

- Navigate to the location where you saved the Course.csv file.
- Select the file and upload it.

##### 3. Auto-Detect Fields:

- Salesforce automatically detects the fields from the CSV file and populates the record data.

##### 4. Set Record Name Field:

- Choose "Course ID" as the Record Name field.

#### 5. Verify Field Data Types:

- Ensure that all fields are matched with the correct data types, as per the data in the CSV

The screenshot shows a Salesforce Lightning component titled 'Course - Course Recently Viewed'. It displays a table with 5 items, updated a few seconds ago. The columns are: Course - Course, Course Name, Description, Start Date, End Date, and Instructor. The data is as follows:

Course - Course	Course Name	Description	Start Date	End Date	Instructor
1 GMAT	GMAT	Let's Learn GMAT	04/01/2024	09/01/2024	Sanjay
2 DuoLingo	DuoLingo	Let's Learn DuoLingo	04/01/2024	14/09/2024	Sameer
3 TOEFL	TOEFL	Let's Learn TOEFL	04/01/2024	27/07/2024	Prajwal
4 GRE	GRE	Let's Learn GRE	03/01/2024	11/07/2024	Shivam
5 IELTS	IELTS	Let's Learn IELTS	03/01/2024	31/05/2024	Sandeep

## 5. Finalize the Creation

### 1. Click Next:

- Review the settings and mappings. Click "Next."

### 2. Enter Object Settings:

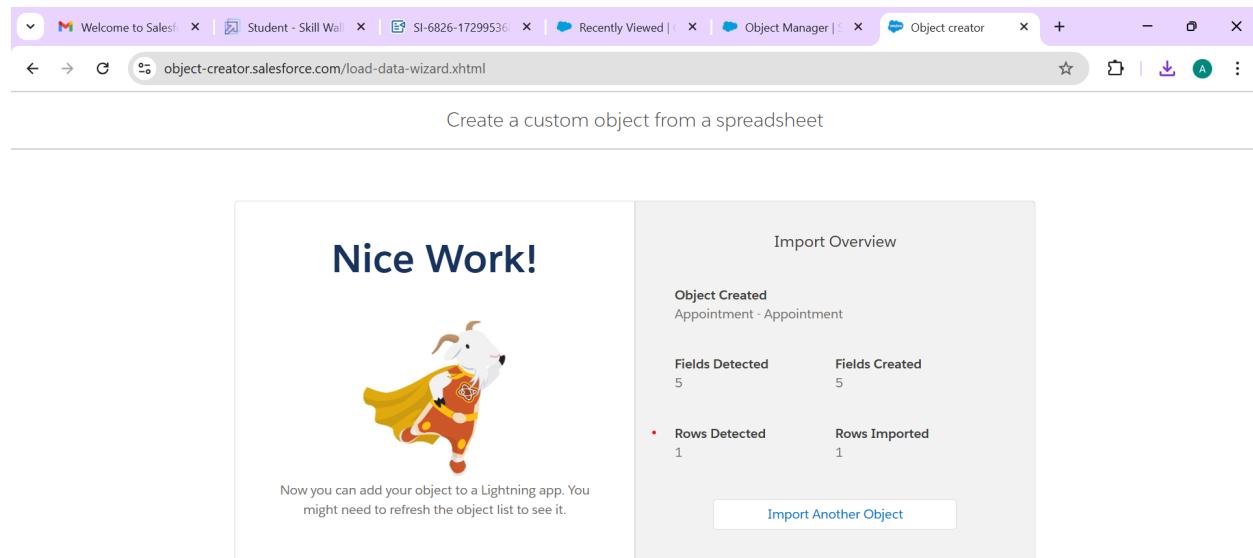
- Configure the object settings, such as label, plural label, and other optional settings as needed.

### 3. Click Finish:

- Click "Finish" to complete the creation process.

### 4. Confirmation:

- The Course object is successfully created, and the data from the CSV file is imported into Salesforce.



## ► Create Consultant Object

### Prepare the Consultant CSV File

#### 1. Download the Spreadsheet:

- Download the provided spreadsheet and open it in a spreadsheet editor like Microsoft

Excel or Google Sheets.

2. Save the File:

- Save the file as ' Consultant.csv'.

2. Log into Salesforce and Access Setup

1. Log In:

- Go to your Salesforce Developer Org and log in with your credentials.

2. Access Setup:

- Click on the gear icon (⚙️) in the upper right corner

- Select "Setup" from the dropdown menu.

3. Navigate to Object Manager:

- Click on the "Object Manager" tab at the top of the Setup screen.

3. Create Custom Object from Spreadsheet

1. Click Create:

- In the Object Manager, click on the "Create" button.

2. Select Custom Object from Spreadsheet:

- From the dropdown menu, select "Custom Object from Spreadsheet."

3. Login with Salesforce:

- Click "Login With Salesforce."

4. Enter Salesforce Credentials:

- Enter the username and password for your Salesforce account.

- Click "Log In."

5. Grant Permissions:

- Click "Allow" to grant the necessary permissions.

4. Upload the CSV File

1. Click Upload:

- Click the "Upload" button.

2. Select Consultant.csv File:

- Navigate to the location where you saved the Consultant.csv file.

- Select the file and upload it.

### 3. Auto-Detect Fields:

- Salesforce automatically detects the fields from the CSV file and populates the record data.

### 4. Set Record Name Field:

- Choose "Consultant ID" as the Record Name field.

### 5. Verify Field Data Types:

- Ensure that all fields are matched with the correct data types, as per the data in the CSV

	Consultant - Cons...	Address	Email	Expertise	First Name	Last Name	Phone
1	Tarakesh Kolla	Street no 02, Ali bagh, Lingampally, Hyderabad	tarakesh@gmail.com	Immigration	Tarakesh	Kolla	1230000000
2	Phani Verma	Street no 12, Banjara hills Colony, Hyderabad	phani@gmail.com	Immigration	Phani	Verma	1230000000
3	Rakesh Bhoomani	Street no 12, Banjara hills Colony, Hyderabad	rakesh@gmail.com	Education	Rakesh	Bhoomani	1230000000

### 5. Finalize the Creation

#### 1. Click Next:

- Review the settings and mappings. Click "Next."

#### 2. Enter Object Settings:

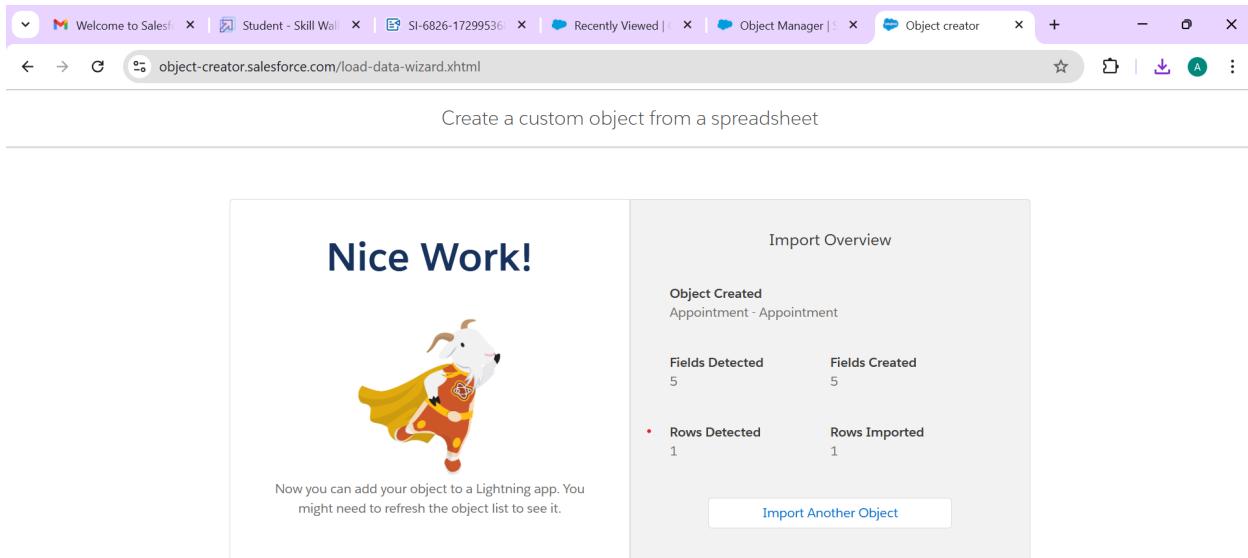
- Configure the object settings, such as label, plural label, and other optional settings as needed.

#### 3. Click Finish:

- Click "Finish" to complete the creation process.

#### 4. Confirmation:

- The Consultant object is successfully created, and the data from the CSV file is imported into Salesforce..



## ► Create Student Object

### Prepare the Student CSV File

#### 1. Download the Spreadsheet:

- Download the provided spreadsheet and open it in a spreadsheet editor like Microsoft Excel or Google Sheets.

#### 2. Save the File:

- Save the file as 'Student.csv'.

#### 2. Log into Salesforce and Access Setup

##### 1. Log In:

- Go to your Salesforce Developer Org and log in with your credentials.

##### 2. Access Setup:

- Click on the gear icon (⚙️) in the upper right corner.
- Select "Setup" from the dropdown menu.

##### 3. Navigate to Object Manager:

- Click on the "Object Manager" tab at the top of the Setup screen.

##### 3. Create Custom Object from Spreadsheet

1. Click Create:

- In the Object Manager, click on the "Create" button.

2. Select Custom Object from Spreadsheet:

- From the dropdown menu, select "Custom Object from Spreadsheet."

3. Login with Salesforce:

- Click "Login With Salesforce."

4. Enter Salesforce Credentials:

- Enter the username and password for your Salesforce account.

- Click "Log In."

5. Grant Permissions:

- Click "Allow" to grant the necessary permissions.

4. Upload the CSV File

1. Click Upload:

- Click the "Upload" button.

2. Select Student.csv File:

- Navigate to the location where you saved the Student.csv file.

- Select the file and upload it.

3. Auto-Detect Fields:

- Salesforce automatically detects the fields from the CSV file and populates the record data.

4. Set Record Name Field:

- Choose "Student ID" as the Record Name field.

5. Verify Field Data Types:

- Ensure that all fields are matched with the correct data types, as per the data in the CSV

The screenshot shows the Salesforce Lightning interface with the 'Recently Viewed' list for the 'Student - Student' object. The list contains three items:

	Student - St...	Student Na...	First N...	Last ...	Date of B...	Email	Gender	Address	City	Phone
1	<input type="checkbox"/> Sandeep Naik	Sandeep Naik	Sandeep	Naik	17/04/1999	naik@gmail.com	Male	Hyderabad	Hyderabad	1234567890
2	<input type="checkbox"/> Anjali Sharma	Anjali Sharma	Anjali	Sharma	13/08/2000	anjali@gmail.com	Female	Hyderabad	Hyderabad	1234567890
3	<input type="checkbox"/> shyam	shyam	bhupati	rajuy	31/12/2003	bhupatishyam55@gmail.com	male	hyderabad	hyderabad	9113562069

## 5. Finalize the Creation

### 1. Click Next:

- Review the settings and mappings. Click "Next."

### 2. Enter Object Settings:

- Configure the object settings, such as label, plural label, and other optional settings as needed.

### 3. Click Finish:

- Click "Finish" to complete the creation process.

### 4. Confirmation:

- The Consultant object is successfully created, and the data from the CSV file is imported into Salesforce..

Nice Work!

Object Created  
Appointment - Appointment

Fields Detected	Fields Created
5	5

Rows Detected	Rows Imported
1	1

[Import Another Object](#)

Import Overview

Now you can add your object to a Lightning app. You might need to refresh the object list to see it.



## ► Create Appointment Object

### Prepare the Appointment CSV File

#### 1. Download the Spreadsheet:

- Download the provided spreadsheet and open it in a spreadsheet editor like Microsoft Excel or Google Sheets.

#### 2. Save the File:

- Save the file as 'Appointment.csv'.

#### 2. Log into Salesforce and Access Setup

##### 1. Log In:

- Go to your Salesforce Developer Org and log in with your credentials.

##### 2. Access Setup:

- Click on the gear icon (⚙️) in the upper right corner.

- Select "Setup" from the dropdown menu.

##### 3. Navigate to Object Manager:

- Click on the "Object Manager" tab at the top of the Setup screen.

#### 3. Create Custom Object from Spreadsheet

##### 1. Click Create:

- In the Object Manager, click on the "Create" button.

2. Select Custom Object from Spreadsheet:

- From the dropdown menu, select "Custom Object from Spreadsheet."

3. Login with Salesforce:

- Click "Login With Salesforce."

4. Enter Salesforce Credentials:

- Enter the username and password for your Salesforce account.

- Click "Log In."

5. Grant Permissions:

- Click "Allow" to grant the necessary permissions.

4. Upload the CSV File

1. Click Upload:

- Click the "Upload" button.

2. Select Appointment.csv File:

- Navigate to the location where you saved the Student.csv file.

- Select the file and upload it.

3. Auto-Detect Fields:

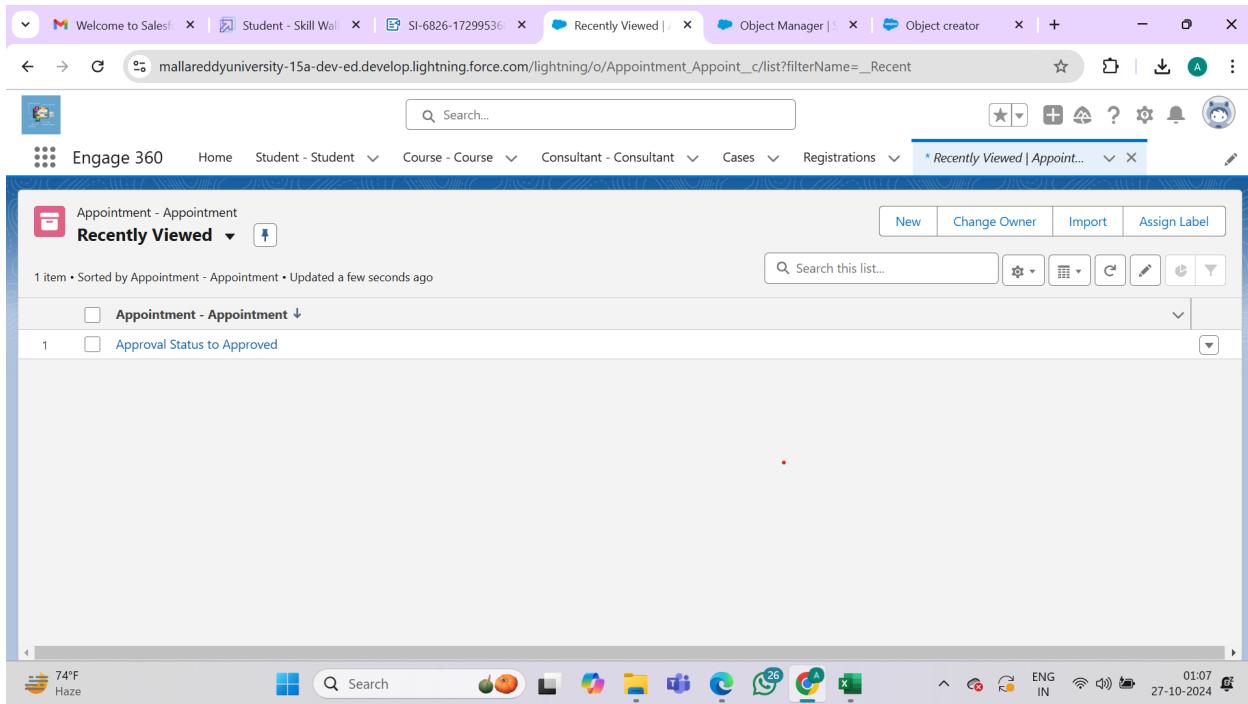
- Salesforce automatically detects the fields from the CSV file and populates the record data.

4. Set Record Name Field:

- Choose "Appointment ID" as the Record Name field.

5. Verify Field Data Types:

- Ensure that all fields are matched with the correct data types, as per the data in the CSV



## 5. Finalize the Creation

### 1. Click Next:

- Review the settings and mappings. Click "Next."

### 2. Enter Object Settings:

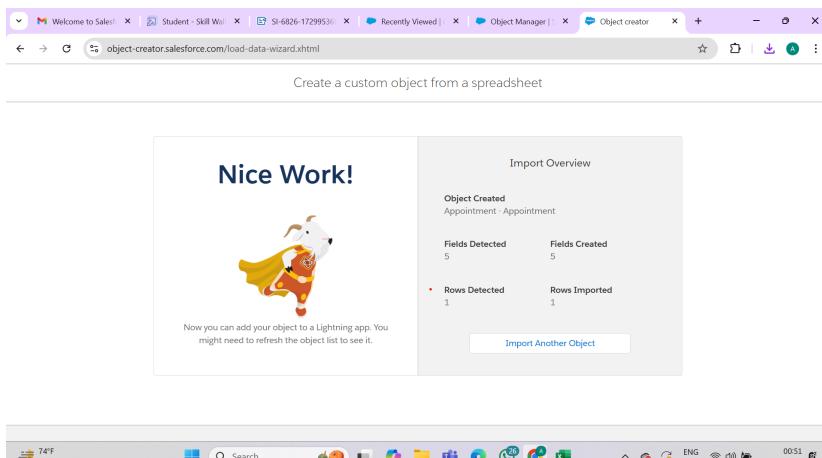
- Configure the object settings, such as label, plural label, and other optional settings as needed.

### 3. Click Finish:

- Click "Finish" to complete the creation process.

### 4. Confirmation:

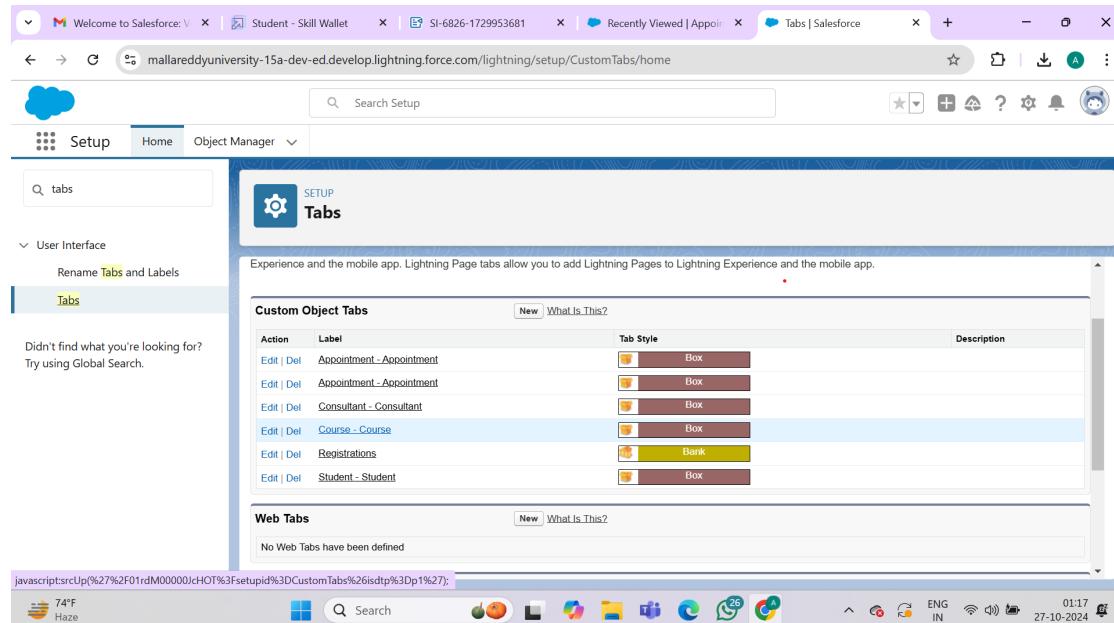
- The Appointment object is successfully created, and the data from the CSV file is imported into Salesforce..



## TASK-3

### Tabs Creating a Custom Tab

- Navigate to Tabs Setup:
- Go to the Setup page in Salesforce.
- In the Quick Find bar, type Tabs and click on Tabs.
- Create a New Custom Object Tab:
- Under Custom Object Tabs, click on New.
- Select the Registration Object:
- In the Object dropdown, select Assignment.
- Choose a Tab Style that you prefer.
- Assign the Tab to Profiles:
- Click Next to move to the Add to Profiles page.
- Keep the default settings to assign the tab to all profiles.
- Add the Tab to Custom Apps:
- Click Next to move to the Add to Custom Apps page.
- Keep the default settings to add the tab to all custom apps.
- Save the Tab:
- Click Save to complete the creation of the custom tab for the "Registration" object.



## TASK-4

### The Lightning App

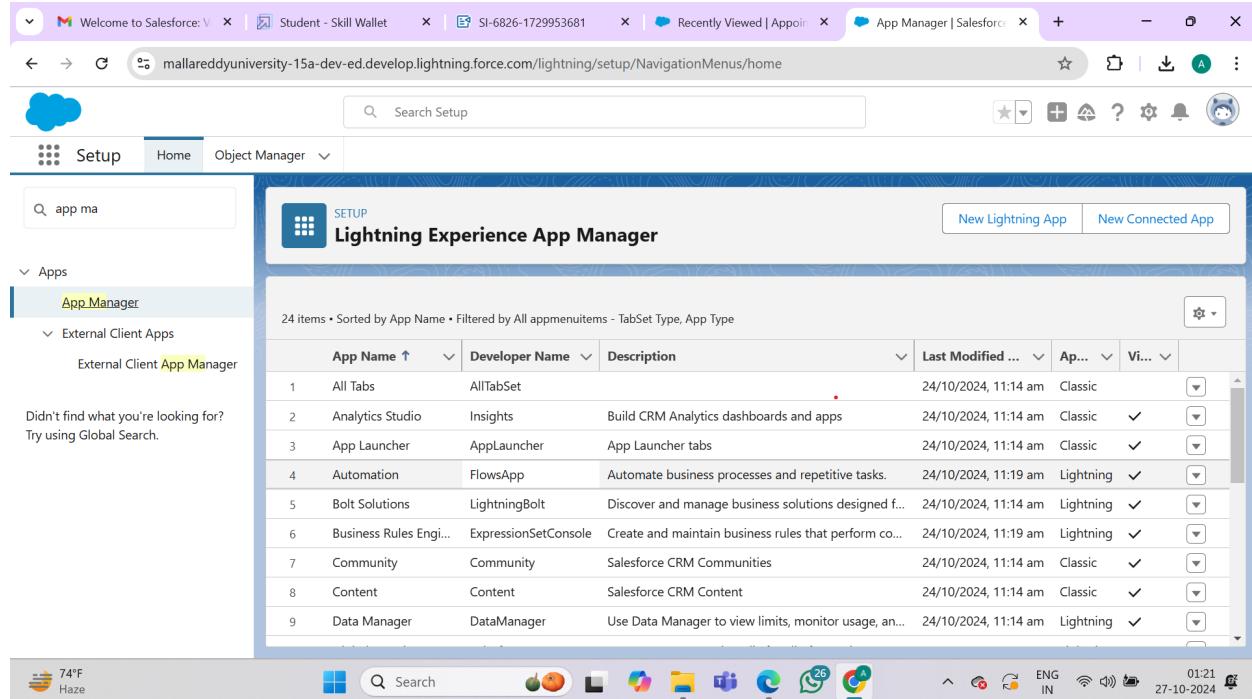
#### Create a Lightning App

##### 1. Access App Manager:

- Go to the Setup page in Salesforce.
- In the Quick Find bar, type App Manager and select it.

##### 2. Create a New Lightning App:

- Click on New Lightning App.

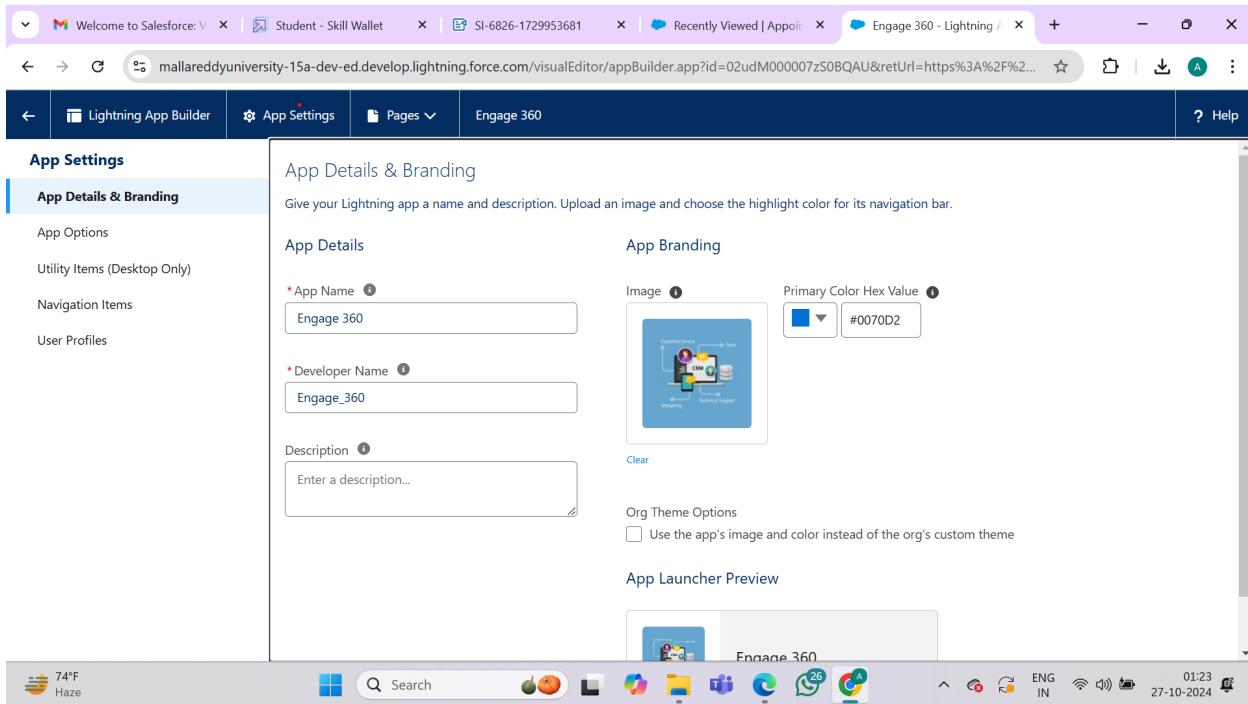


The screenshot shows the Salesforce App Manager interface. The left sidebar has a search bar and navigation links for 'Setup', 'Home', and 'Object Manager'. Under 'Apps', 'App Manager' is selected, showing a list of 24 items. The main area displays a table with columns: App Name, Developer Name, Description, Last Modified, Type, and Visibility. The table includes rows for All Tabs, Analytics Studio, App Launcher, Automation, Bolt Solutions, Business Rules Engine, Community, Content, and Data Manager. The interface is in Lightning mode, indicated by the blue header and sidebar. The bottom status bar shows weather (74°F Haze), system icons, and the date/time (27-10-2024, 01:21).

App Name	Developer Name	Description	Last Modified	Type	Visibility
All Tabs	AllTabSet		24/10/2024, 11:14 am	Classic	✓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	24/10/2024, 11:14 am	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	24/10/2024, 11:14 am	Classic	✓
Automation	FlowsApp	Automate business processes and repetitive tasks.	24/10/2024, 11:19 am	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed f...	24/10/2024, 11:14 am	Lightning	✓
Business Rules Engi...	ExpressionSetConsole	Create and maintain business rules that perform co...	24/10/2024, 11:19 am	Lightning	✓
Community	Community	Salesforce CRM Communities	24/10/2024, 11:14 am	Classic	✓
Content	Content	Salesforce CRM Content	24/10/2024, 11:14 am	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, an...	24/10/2024, 11:14 am	Lightning	✓

##### 3. Fill in App Details and Branding:

- App Name: Enter Engage 360.
- Developer Name: This field will auto-populate.
- Description: Provide a meaningful description of the app.
- Image: (Optional) Upload an image if desired, though it's not mandatory.
- Primary Color Hex Value: Leave this as the default value.
- Click Next to proceed



## 6. Add Navigation Items:

- In the Navigation Items section, search for the following items in the search bar:
  - Home
  - Student
  - Course
  - Appointment
  - Consultant
  - Dashboard
- Select each item and move it to the selected items section using the arrow button.
- Note: Make sure to select the Registration custom object that you created in the Task 2 (Registration Object Creation).
- Click Next to continue.

**Navigation Items**

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

**Available Items**

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment - Appointment
- ... (many more items listed)

**Selected Items**

- Home
- Student - Student
- Course - Course
- Consultant - Consultant
- Appointment Categories
- Cases
- Registrations

## 7. Add User Profiles:

- In the User Profiles section, search for System Administrator in the search bar.
- Click the arrow button to add it to the selected profiles.

**User Profiles**

Choose the user profiles that can access this app.

**Available Profiles**

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Custom: Marketing Profile

**Selected Profiles**

- System Administrator

## 8. Save & Finish:

- Click Save & Finish to complete the creation of the Lightning App Page.

The screenshot shows the Salesforce Lightning Experience App Manager page. The left sidebar has a search bar and navigation tabs for Setup, Home, and Object Manager. Under Apps, the 'App Manager' tab is selected, showing the 'External Client Apps' section with 'External Client App Manager' highlighted. A message says ' Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Lightning Experience App Manager' and displays a table of 24 items. The columns are: App Name, Developer Name, Description, Last Modified, App Type, and Version. The table lists various standard Salesforce apps like All Tabs, Analytics Studio, App Launcher, Automation, Bolt Solutions, Business Rules Engine, Community, Content, and Data Manager, along with their descriptions and details.

App Name ↑	Developer Name	Description	Last Modified ...	Ap... ▾	Vi... ▾
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	24/10/2024, 11:14 am	Classic	▼
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	24/10/2024, 11:14 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	24/10/2024, 11:14 am	Classic	✓
4 Automation	FlowsApp	Automate business processes and repetitive tasks.	24/10/2024, 11:19 am	Lightning	✓
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed f...	24/10/2024, 11:14 am	Lightning	✓
6 Business Rules Engi...	ExpressionSetConsole	Create and maintain business rules that perform co...	24/10/2024, 11:19 am	Lightning	✓
7 Community	Community	Salesforce CRM Communities	24/10/2024, 11:14 am	Classic	✓
8 Content	Content	Salesforce CRM Content	24/10/2024, 11:14 am	Classic	✓
9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, an...	24/10/2024, 11:14 am	Lightning	✓

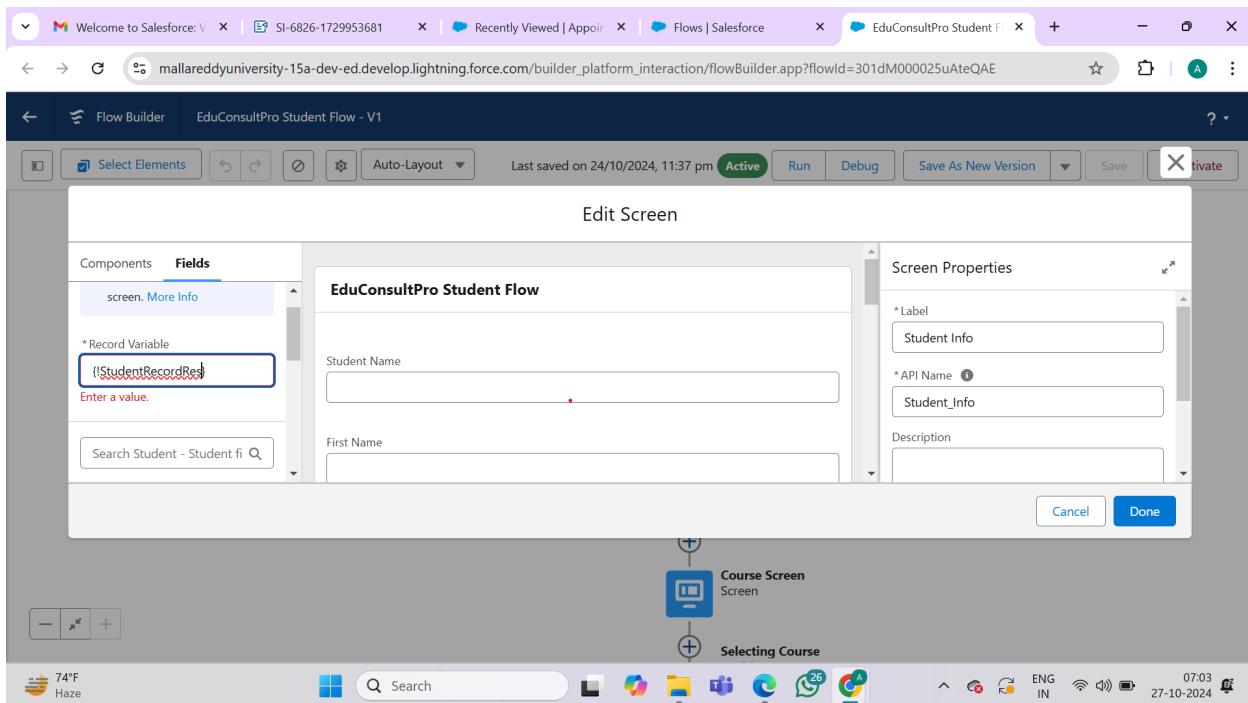
## TASK-5

### Create Screen Flows

# ➤ ScreenFlow for Student Admission Application process

### Add Screen Element

1. From Setup, enter Flow Builder in quick find, select new flow --> ScreenFlow.
2. Add a Screen element.
3. In the Screen Properties pane, for Label, enter "Student Info".
4. 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 screen inorder to collect the student information.

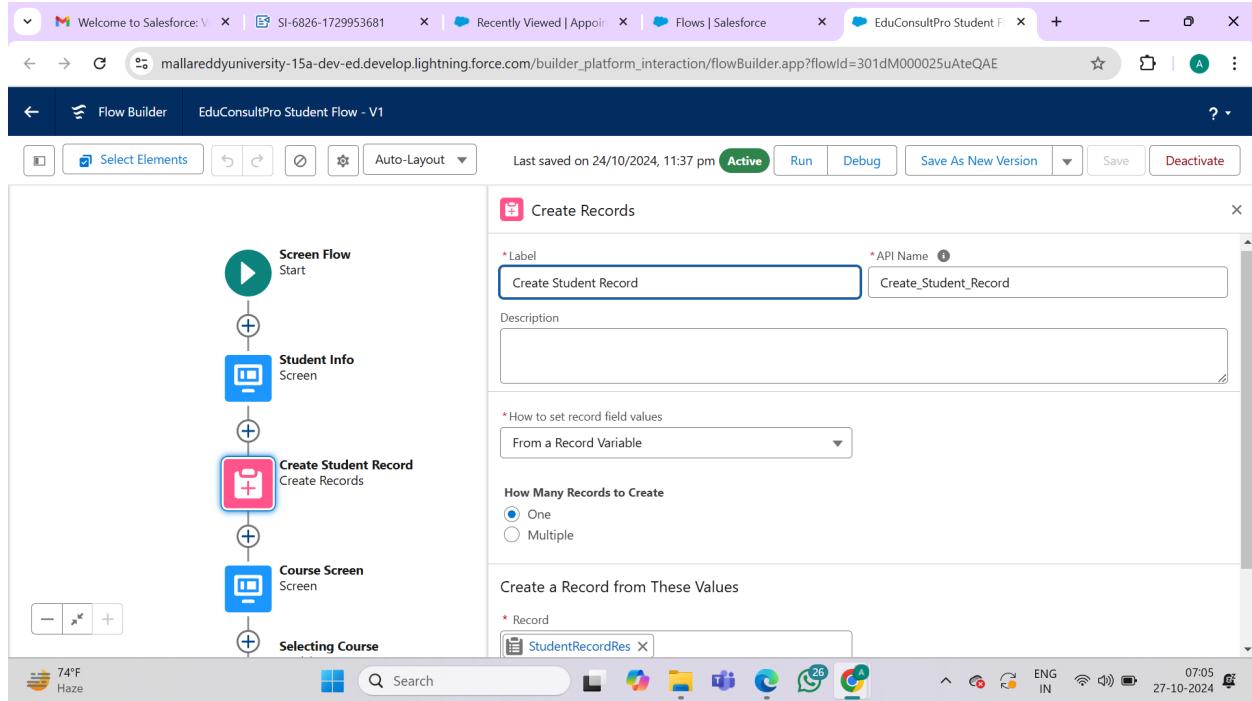


### Create Student Record

1. Add a Create element after Student Info Screen Element, Label it as "Create"

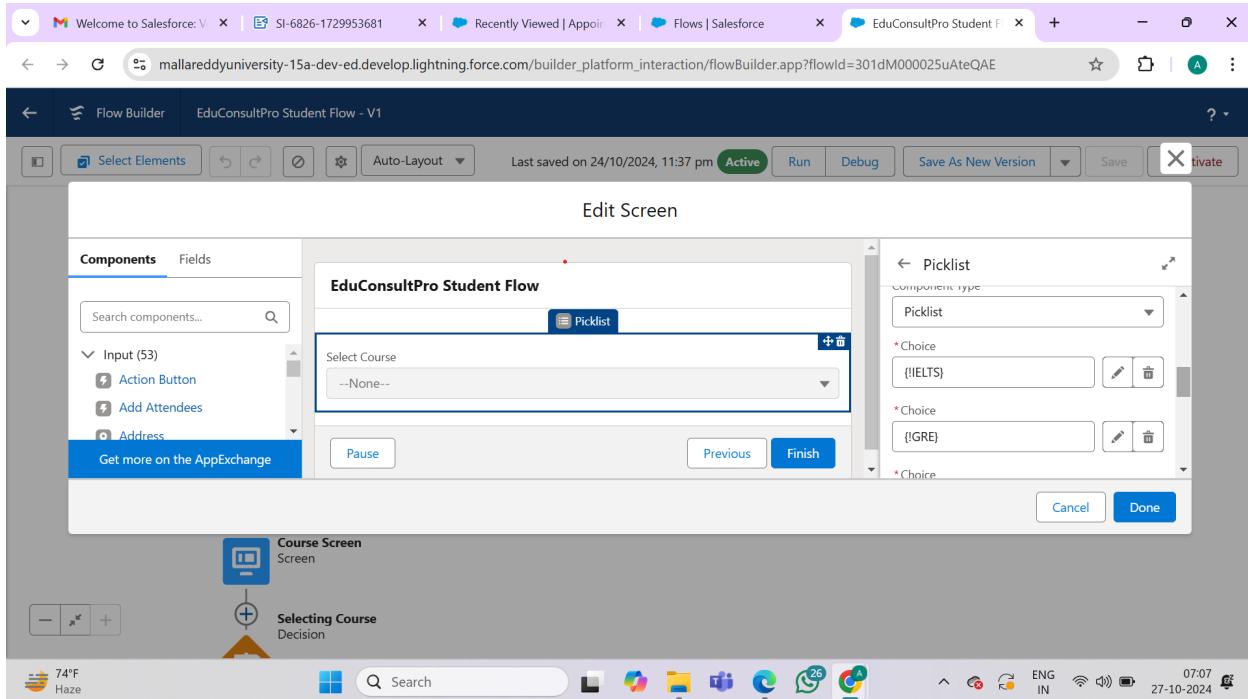
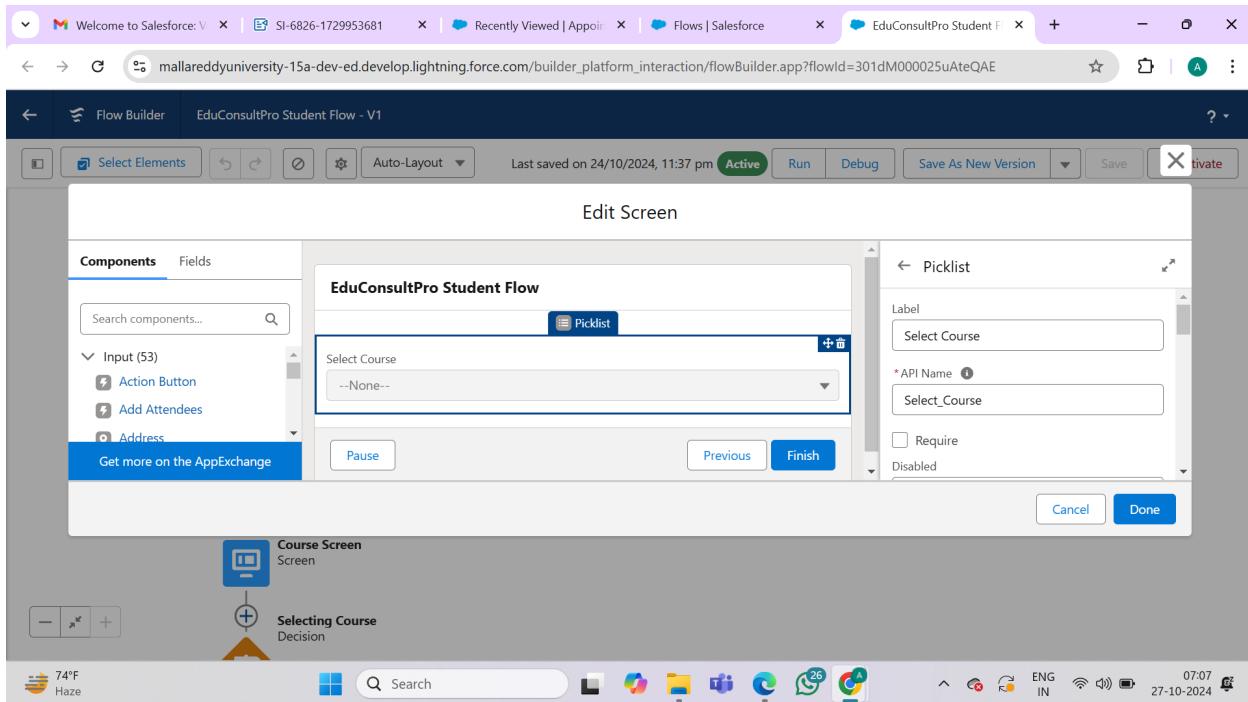
Student Record.”

2. Select “one” under How many records to Create, and select “use all values from a record” under How to Set the record fields.
3. Select the record variable resource(StudentRecordRes) which we have created in the Student Info screen element, under Create a record from these values.



## Add Screen Element

1. Add a Screen Element after Create Student Record Element and label it as Course Screen.
2. 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.
3. Repeat the same for GRE, GMAT, Duolingo, TOEFL.



## Add Decision Element

1. Add a Decision Element after Select Course Screen Element, label it as Selecting Course.
2. Under outcome label it as "Selected IELTS" and write the condition such as

below:

Resource : Select\_Course (Screen Component from Select Course Screen Element)

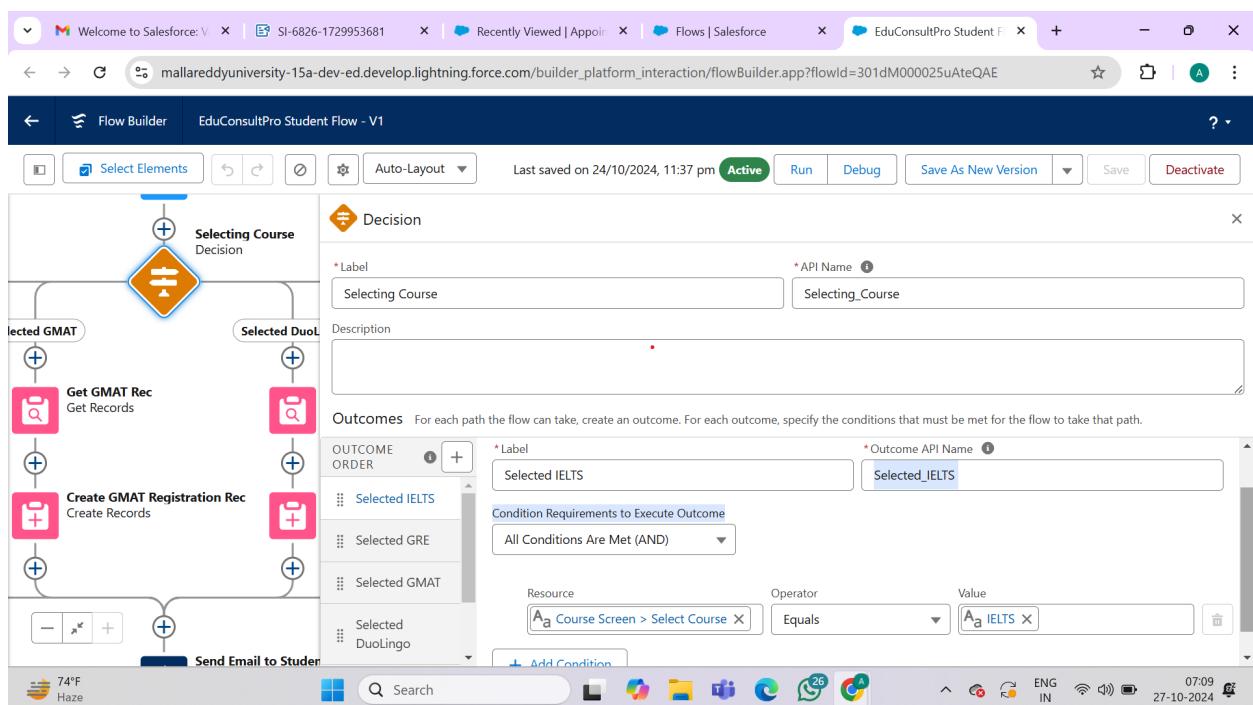
Operator : Equals

Value : IELTS (Choice Variable from Select Course Screen Element)

3. Click on the “+” icon and Repeat step 2 for other options mentioned as below:

1. GRE
2. GMAT
3. DuoLingo
4. TOEFL

4. Click Done.



## GET Record Element

1. Add a GET Record Element after Decision Element, under the IELTS path and label it as “Get IELTS Rec”.

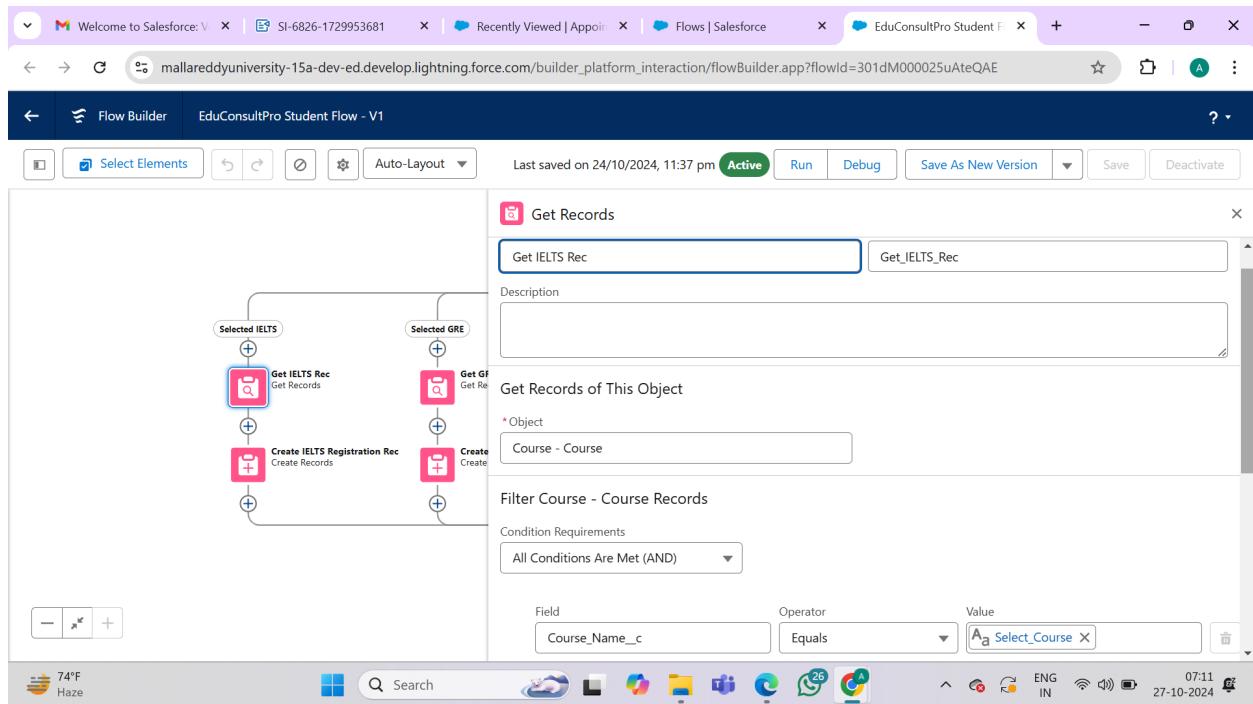
2. Select Object : Course

Condition Requirement : All Conditions are Met(AND)

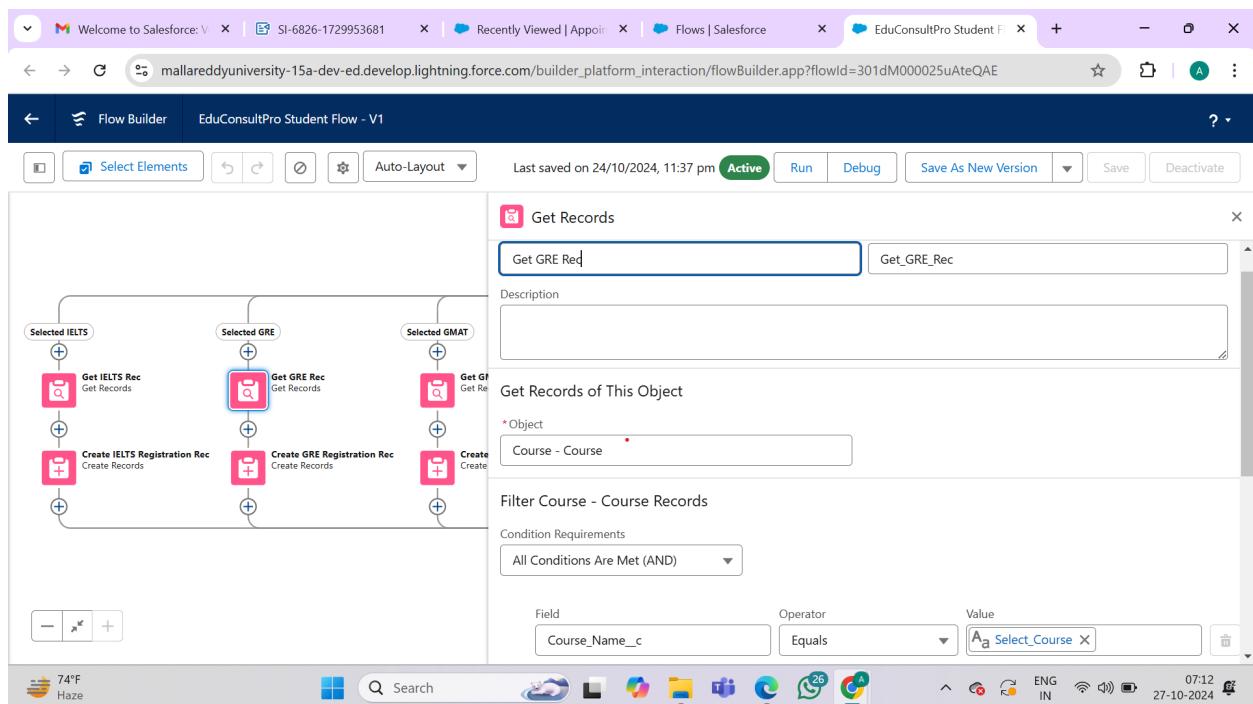
1. Field : Course Name

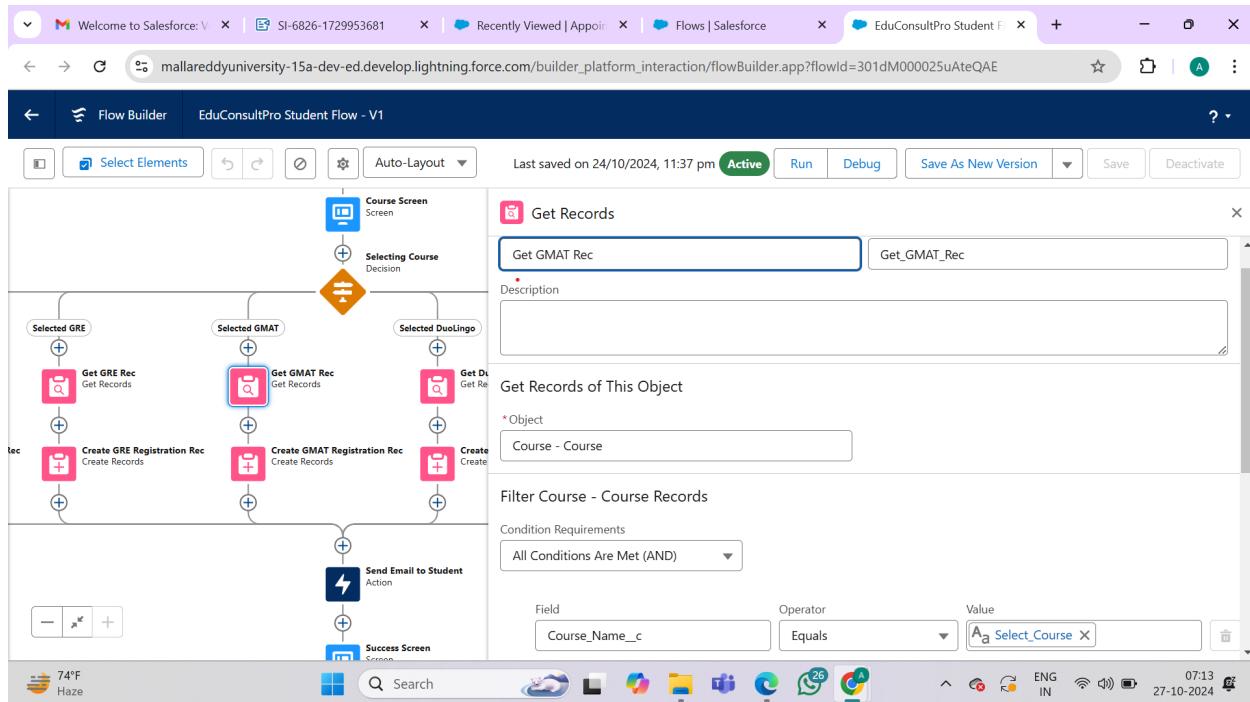
Operator : Equals

Value : {!Select\_Course}



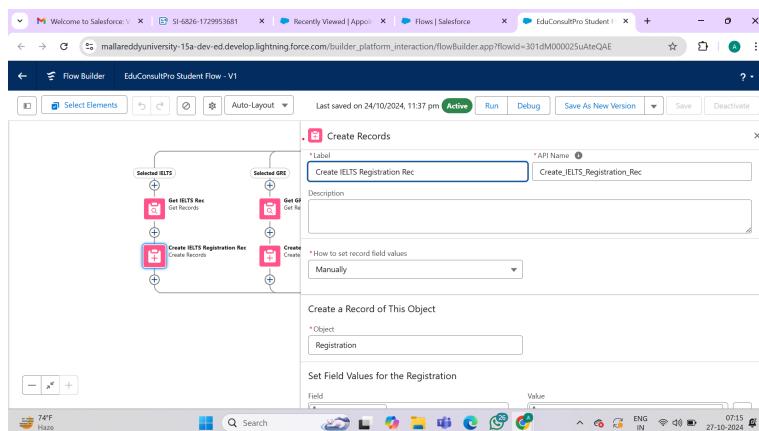
3. Repeat the steps 1 & 2 for the GRE, GMAT, TOEFL, DuoLingo paths.





## Create Registration Record using Create Records Element

1. Add a Create element after the Get IELTS Rec element and label it as “Create IELTS Registration Rec”.
2. Select “one” under How many records to Create, and select “Use separate resources, and literal values” under How to Set the record fields.
3. Select Object : Registration
  1. Field : Course\_Name\_\_c  
Value : {!GetIELTSDRec.Id}
  2. Field : Student\_Name\_\_c  
Value : {!StudentRecordRes.Id}



4. Repeat the steps 1 & 2 for the GRE, GMAT, TOEFL, DuoLingo paths.

## Create Email Text Template

- Click on the toggle toolbox on the left corner, click “New Resource”, then select “Text Template” as Resource Type.
- Give the API name as “StuRegistrationEmailTextTempBody”, select “view as 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.

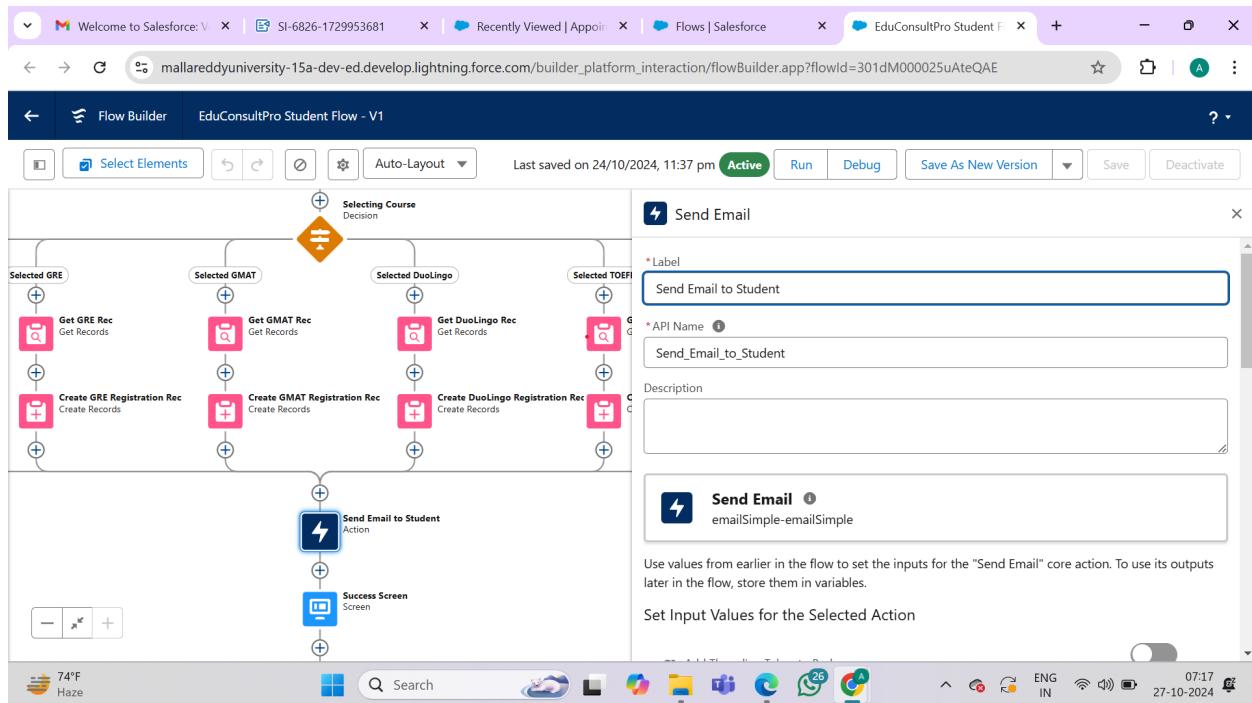
Engage with the Community : Join our vibrant community of students, professionals, and experts who share your passion for education and global opportunities. Connect with like-minded individuals, participate in discussions, and expand your network.

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 to contact us.

Thank you.”

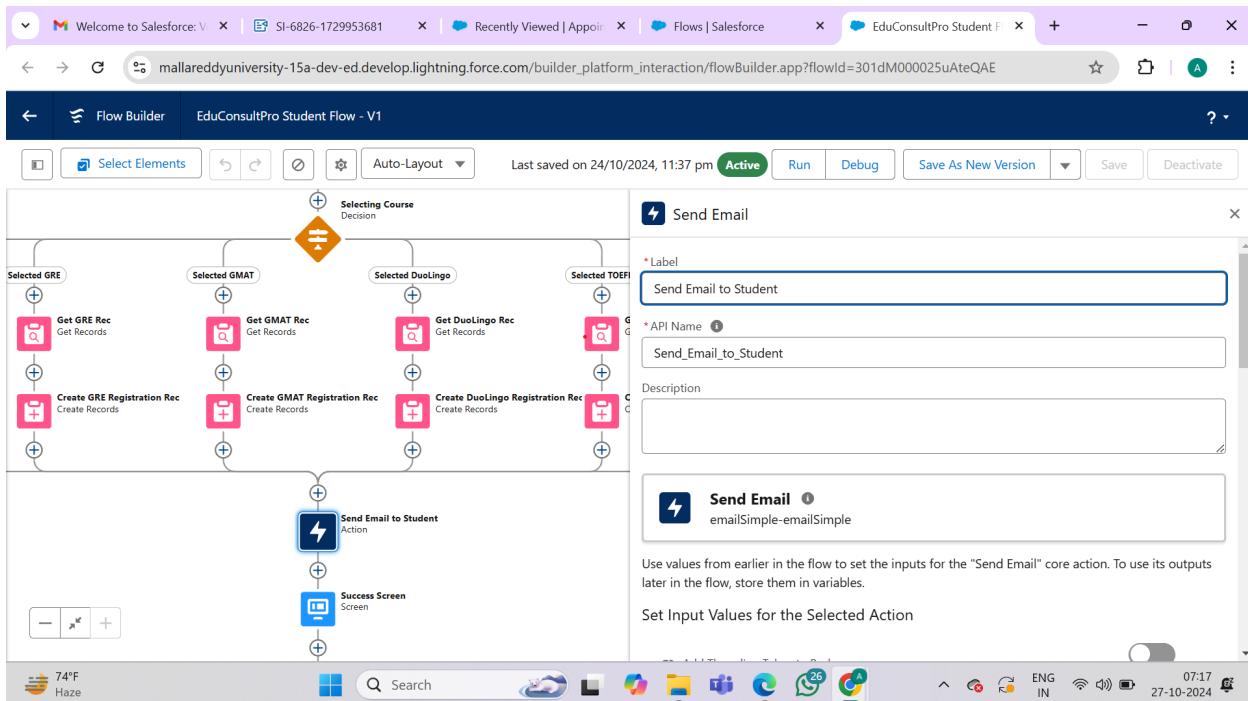
- Click Done.



4. Repeat steps 1 & 2 to create an email text template for the email subject, label it as “StuRegistrationEmailTextTempSub”, write a text message in the body and save it.

## Add an Action Element

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



## Add Screen Element

1. Add a Screen Element after the Send Email to Student Action Element, label it as Success Screen.
2. From the left side panel search for the Display text component and drag it to the main panel, label it as "SuccessMessage".
3. Paste the below in the Resource picker box.  
"Dear {!StudentRecordRes.Name},

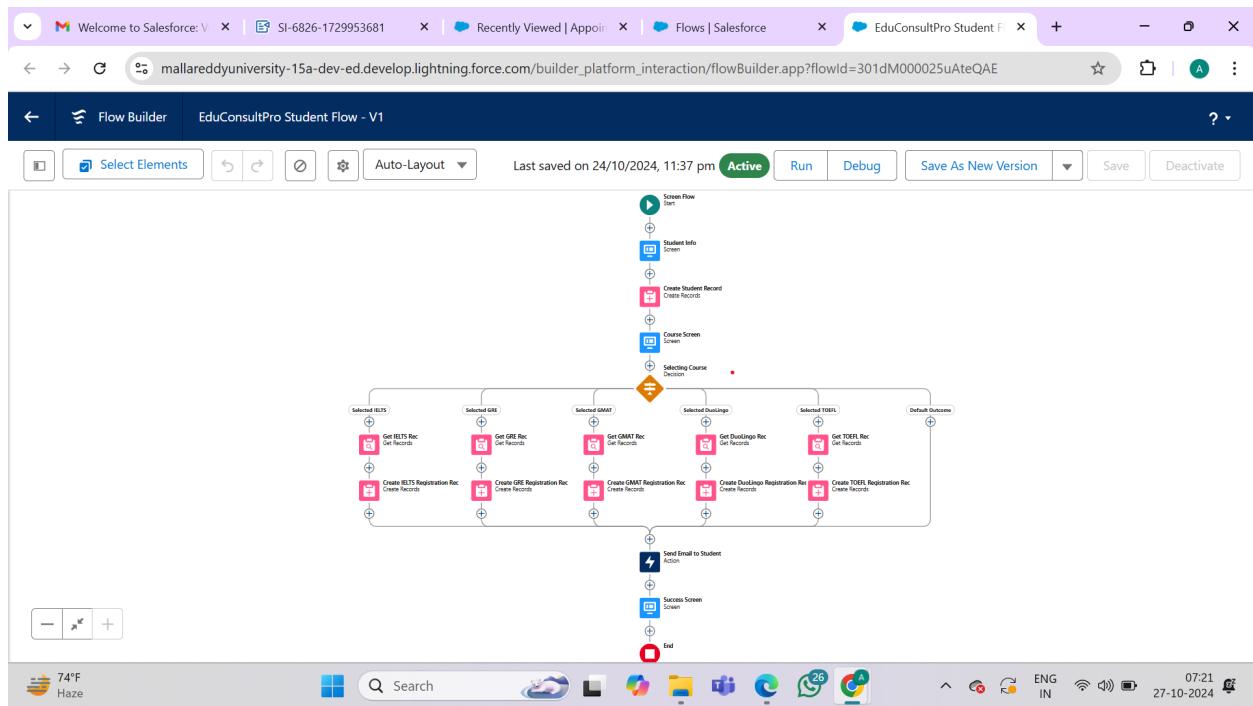
Congratulations and welcome to EduConsultantPro!

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."

4. Click Done.
5. Save the flow and name it as "EduConsultPro Student Flow". Your flow will look as shown below:

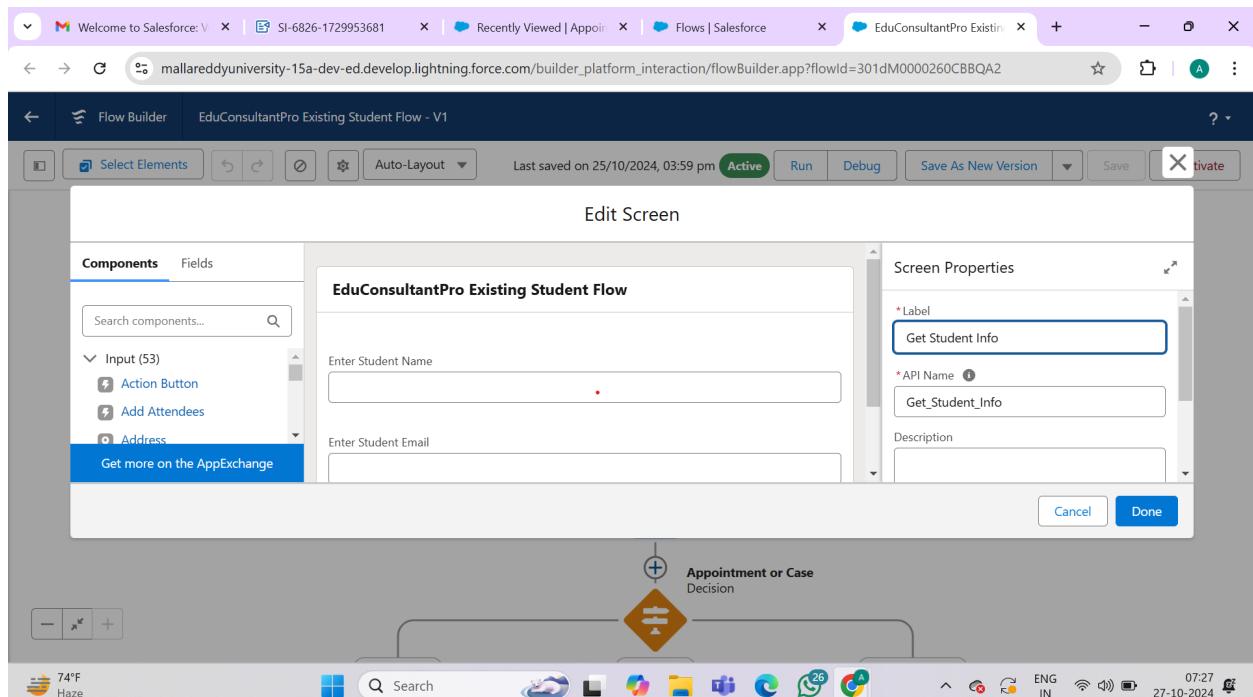


## ► ScreenFlow for Existing Student to Book an Appointment

### Add Screen Element

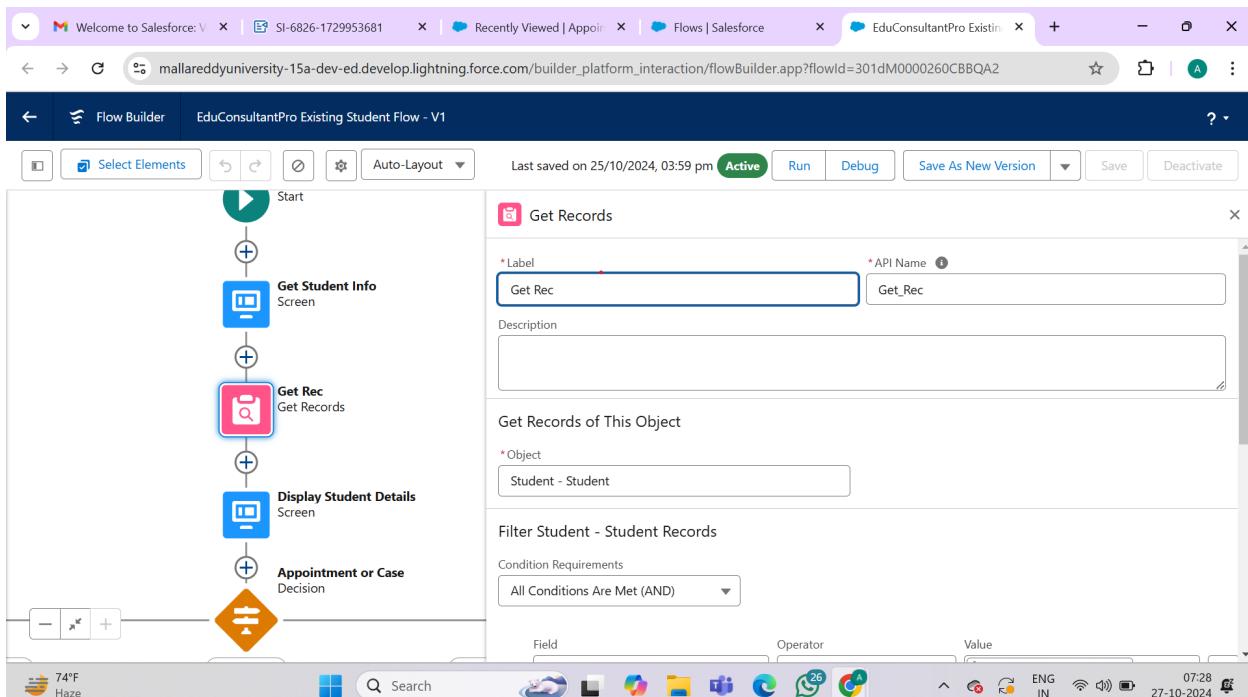
1. From Setup, enter Flow Builder in quick find, select new flow ? ScreenFlow.

2. Add a Screen element.
3. In the Screen Properties pane, for Label, enter “Get Student Info”.
4. Add two Text components from the left side panel. Give the Label’s as follows:  
 1st Text Component Label : Enter Student Name  
 2nd Text Component Label : Enter Student Email
5. Click on Done.



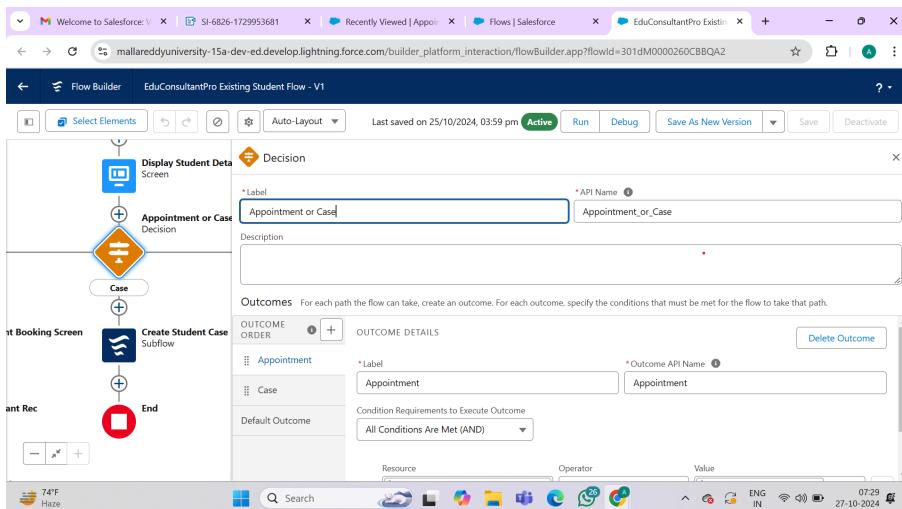
## Add GET Record Element

1. Add a GET Record Element after Decision Element, under the IELTS path and label it as “Get Rec”.
2. Select Object : Student  
 Condition Requirement : All Conditions are Met(AND)
  1. Field : Student Name  
 Operator : Equals  
 Value : {!Enter\_Student\_Name}
  2. Field : Email\_\_c  
 Operator : Equals  
 Value : {!Enter\_Student\_Email}



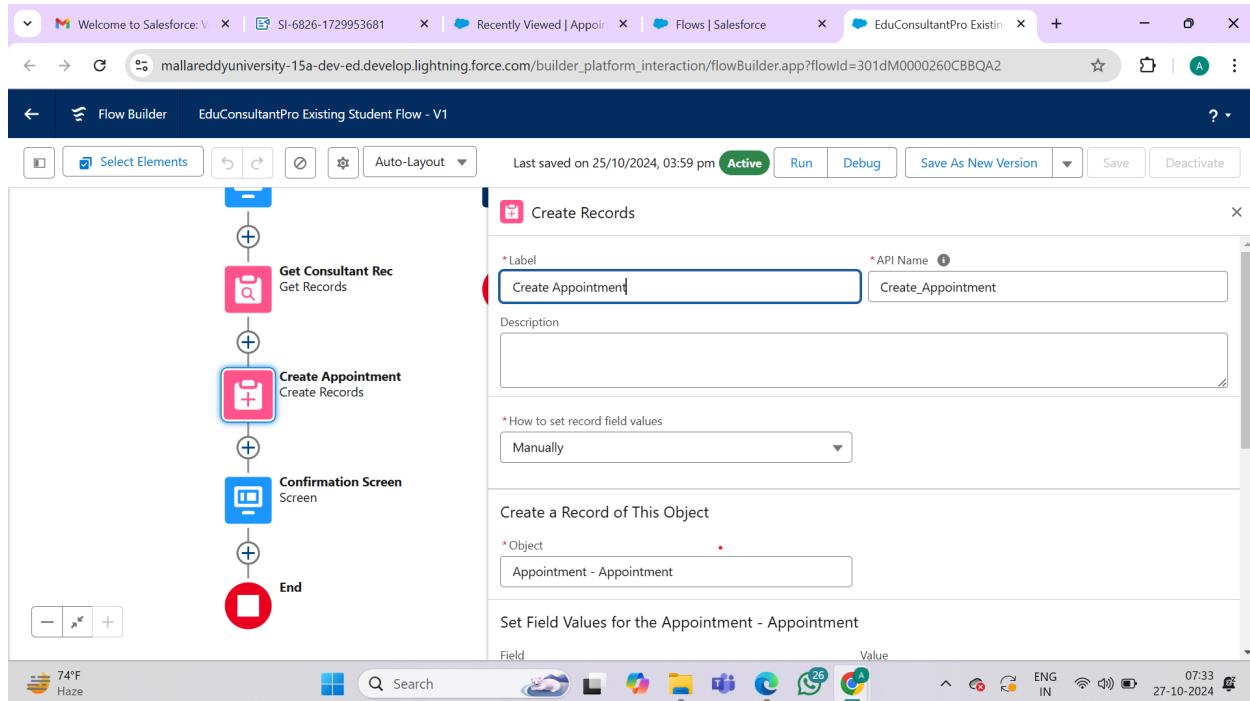
## Add Decision Element

- 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 as below:  
Resource : {!How\_may\_I\_Help\_you}  
Operator : Equals  
Value : {!Book\_an\_Appointment}
- Click on the “+” icon and Repeat step 2 for Case options mentioned.



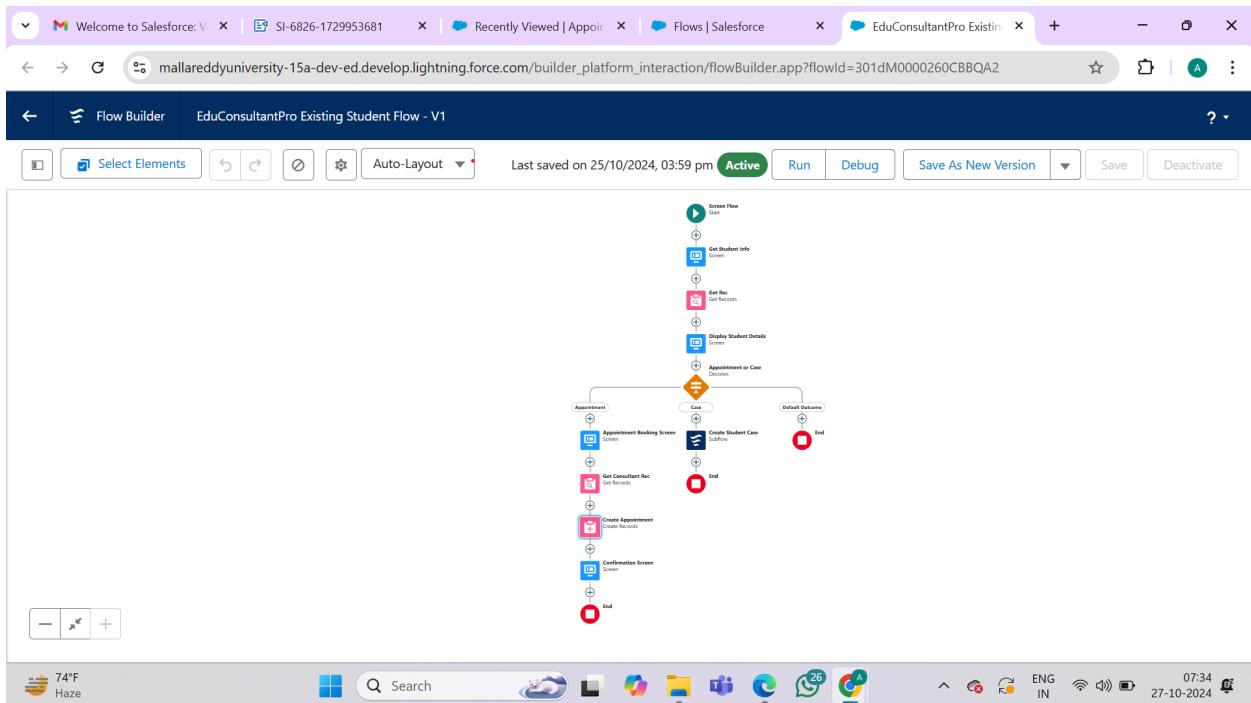
# Create Appointment Record

1. Add a Create element after the Get Consultant Rec element and label it as "Create Appointment".
2. Select "one" under How many records to Create, and select "Use separate resources, and literal values" under How to Set the record fields.
3. Select Object : Appointment
  1. Field : Appointment\_DateTime\_\_c  
Value : {!AppointmentRecordRes.Appointment\_DateTime\_\_c}
  2. Field : Consultant\_\_c  
Value : {!Get\_Constant\_Rec.Id}
  3. Field : Notes\_\_c  
Value : {!AppointmentRecordRes.Notes\_\_c}
  4. Field : PurposeTopic\_\_c  
Value : {!AppointmentRecordRes.PurposeTopic\_\_c}
  5. Field : Student\_Name\_\_c  
Value : {!Get\_Rec.Id}



## Add an SubFlow Element

- Add a subflow element after the Decision Element, on the Case path 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”, you can use the below image for reference.



► ScreenFlow to Combine all the flows at one place

## Add Screen Element

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

“Welcome to EduConsultantPro  
your premier destination for education and immigration solutions!”

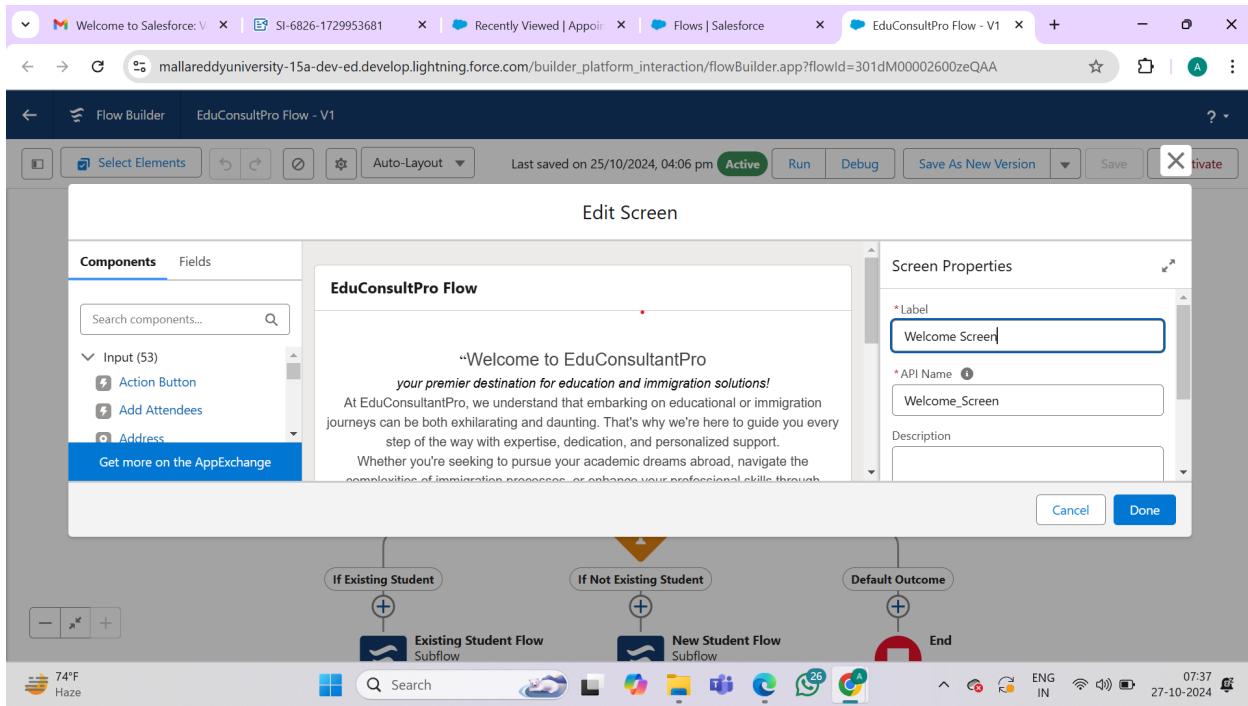
At EduConsultantPro, we understand that embarking on educational or immigration journeys can be both exhilarating and daunting. That's why we're here to guide you every step of the way with expertise, dedication, and personalized support.

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 of your 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 experience with us seamless and rewarding.

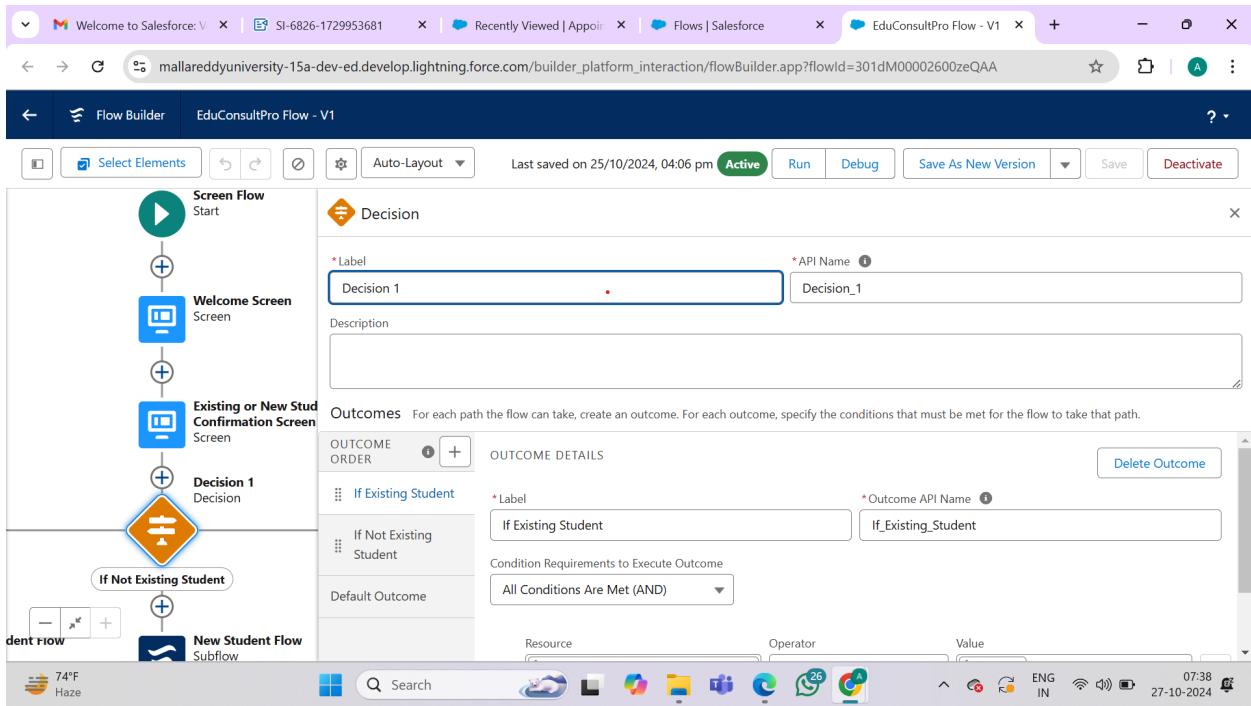
Welcome to EduConsultantPro – where your aspirations meet our expertise, and together, we pave the path to success. Let's embark on this transformative journey together!"

4. Click Done.



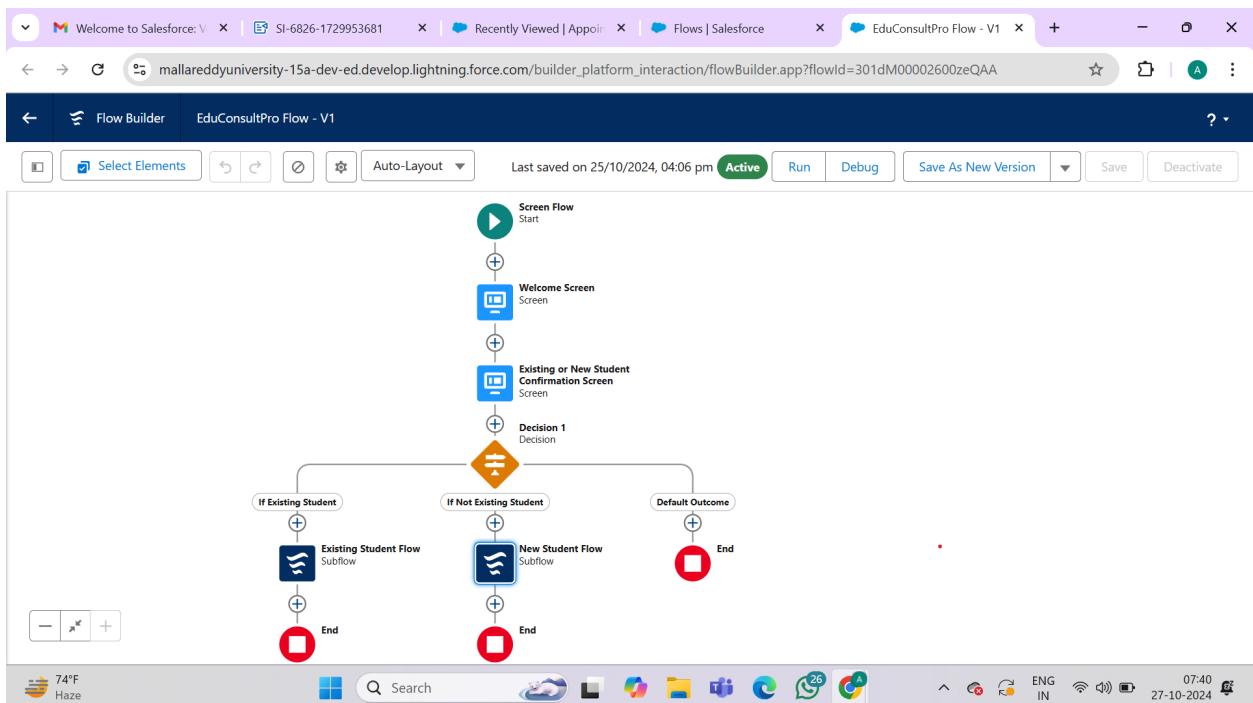
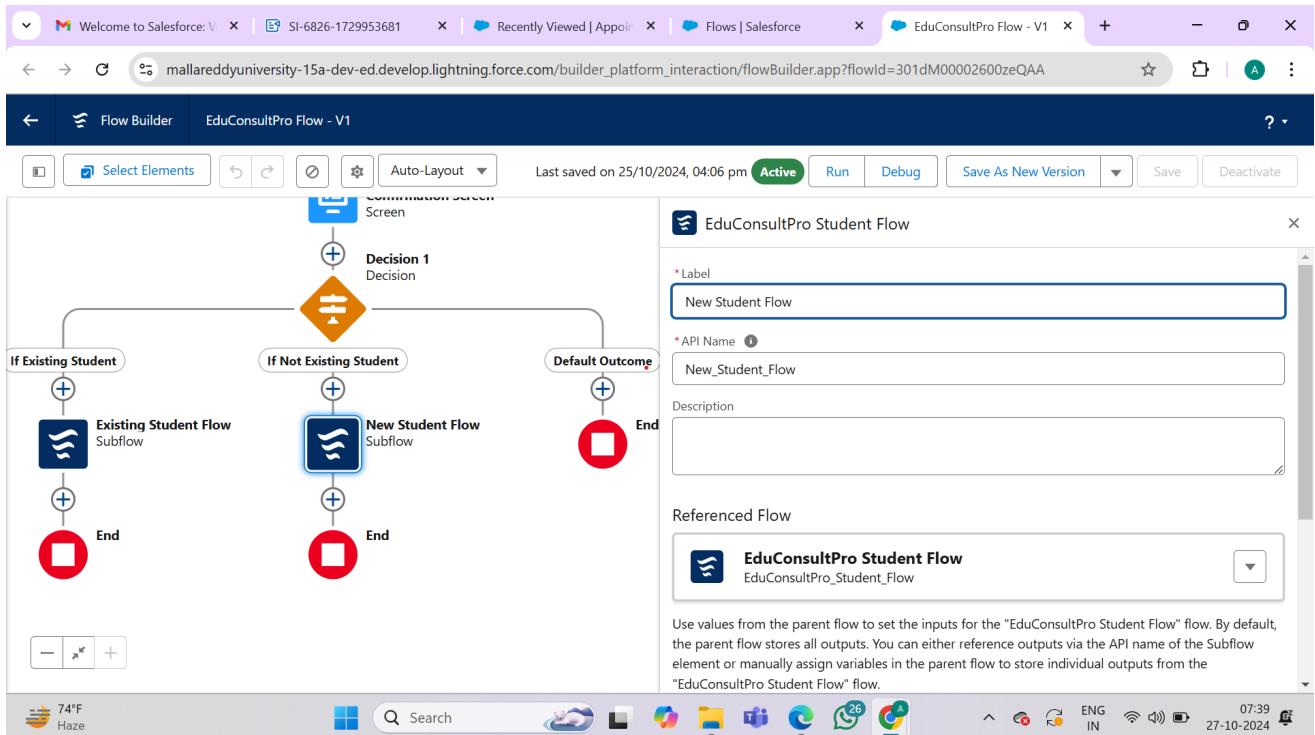
## Add Decision Element

1. Add a Decision Element after Existing or New Student Confirmation Screen Element, label it as “Decision 1”.
2. Under outcome label it as “If Existing Student” and write the condition such as below:  
 Resource : {!Are\_you\_a\_Existing\_Student}  
 Operator : Equals  
 Value : {!Yes}
3. Click on the “+” icon and Repeat step 2 for No options mentioned.



## Add an SubFlow Element

1. 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".
2. Save the flow and label it as "EduConsultantPro Existing Student Flow".



## TASK-6

### Dashboards

The screenshot shows a Salesforce dashboard with the title "Quarterly Performance". The dashboard displays a line chart showing revenue trends from October to December. The Y-axis represents revenue in thousands of dollars, ranging from 0 to 1M. The X-axis shows months Oct, Nov, and Dec. Three data series are plotted: "Closed" (orange line), "Goal" (green line), and "Closed + Open (>70%)" (blue line). A callout bubble points to the value "23/11/2024 - ₹9,65,000". To the right of the chart is an "Assistant" panel with a notification about an opportunity being overdue.

The screenshot shows a Salesforce list view for "Consultant - Consultant" records. The view is titled "Recently Viewed". The list includes columns for Address, Email, Expertise, First Name, Last Name, and Phone. Three items are listed:

	Address	Email	Expertise	First Name	Last Name	Phone
1	Street no 02, Ali bagh, Lingampally, Hyderabad	tarakesh@gmail.com	Immigration	Tarakesh	Kolla	1230000000
2	Street no 12, Banjara hills Colony, Hyderabad	phani@gmail.com	Immigration	Phani	Verma	1230000000
3	Street no 12, Banjara hills Colony, Hyderabad	rakesh@gmail.com	Education	Rakesh	Bhoomani	1230000000

The screenshot shows the Engage 360 interface on a Salesforce page. At the top, there are several tabs: Welcome to Salesf..., Student - Skill Wall, SI-6826-17299536, Recently Viewed |, Object Manager |, and Object creator. The main content area displays a "Recently Viewed" list for "Student - Student". The list shows three items, all updated a few seconds ago:

	Student - St...	Student Na...	First N...	Last ...	Date of B...	Email	Gender	Address	City	Phone
1	Sandeep Naik	Sandeep Naik	Sandeep	Naik	17/04/1999	naik@gmail.com	Male	Hyderabad	Hyderabad	1234567890
2	Anjali Sharma	Anjali Sharma	Anjali	Sharma	13/08/2000	anjali@gmail.com	Female	Hyderabad	Hyderabad	1234567890
3	shyam	shyam	bhupati	rajuv	31/12/2003	bhupatishyam55@gmail.com	male	hyderabad	hyderabad	9113562069

The interface includes a search bar, filter buttons, and standard browser navigation controls at the bottom.

The screenshot shows the Engage 360 interface on a Salesforce page. The top navigation bar includes tabs for Home, Student - Student, Course - Course, Consultant - Consultant, Cases, Registrations, and Analytics. The main content area displays a "Lightning Report" titled "Sample Flow Report: Screen Flows".

The report interface includes:

- A sidebar on the left showing "Flow Interview Logs (13)" with fields like Flow API Name, Interview Status, and Last Modified Date.
- A preview pane showing a table with columns: Flow API Name, Interview Status, Sum of Element Duration in Minutes, and Average Element Duration in Minutes. The preview message states: "Previewing a limited number of records. Run the report to see everything." with an "Update Preview" toggle.
- A message at the bottom stating: "No records returned in preview. Try running the report or editing report filters."
- Report controls at the top right: Add Block, Save & Run, Save, Close, and Run.

The interface includes a search bar, filter buttons, and standard browser navigation controls at the bottom.

# CONCLUSION

A Customer Management Relationship (CMR) application plays a vital role in transforming how institutions manage and deliver services to their clients. This type of application offers centralized data storage, efficient communication channels, and a streamlined workflow to address client needs promptly and effectively. By leveraging CMR technology, institutions can gain a deeper understanding of customer preferences, patterns, and service requirements, leading to personalized and relevant interactions that enhance customer satisfaction and loyalty.

One of the primary benefits of a CMR application is its capacity to improve service efficiency. The application enables institutions to organize and prioritize customer requests, ensuring timely responses and minimizing the potential for missed or delayed service. Automated features, such as reminders, follow-ups, and customer segmentation, allow staff to focus more on quality interaction and less on administrative tasks, thereby creating a seamless service experience. Additionally, centralized data management ensures that all relevant customer information is accessible to authorized personnel, facilitating more informed decision-making and reducing redundancy in communication efforts.

A well-integrated CMR system also provides valuable insights through analytics and reporting features. By analyzing customer interactions, institutions can identify trends, predict demands, and adjust their services to better align with client expectations. Such insights support a proactive approach to service management, allowing institutions to anticipate and address potential issues before they impact customer satisfaction.

In conclusion, a CMR application is an essential tool for institutions aiming to enhance their service delivery, optimize operational efficiency, and build strong, long-lasting relationships with their customers. By centralizing customer data, automating service workflows, and enabling data-driven strategies, a CMR system empowers institutions to adapt to evolving customer needs and maintain a competitive edge in their industry.

# **THANK YOU**