ENGAGE 360

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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

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:

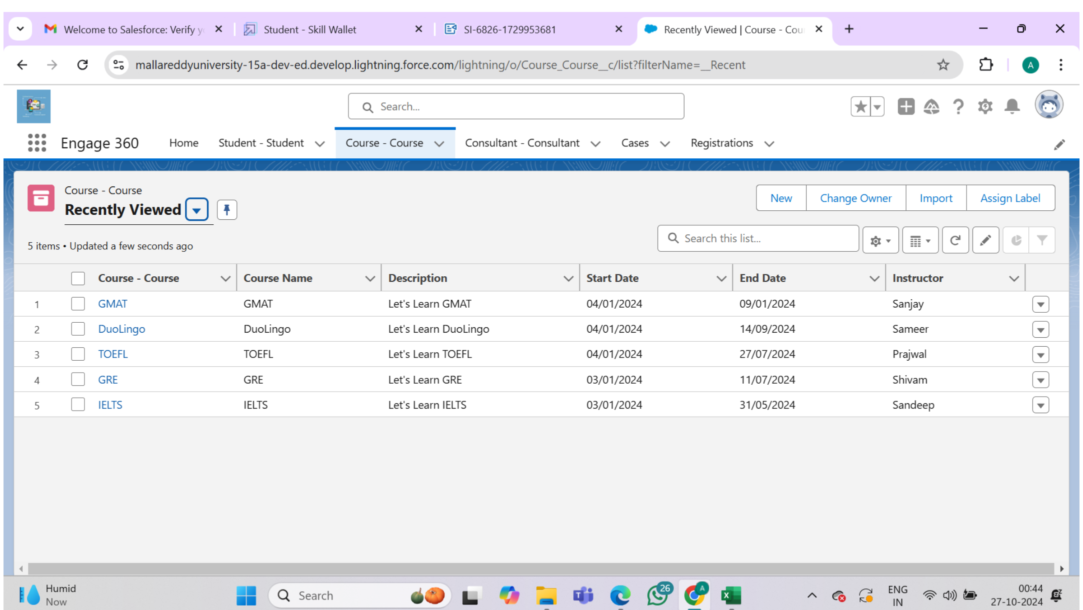
■ Salesforce automatically detects the fields from the CSV file and populates the record data.

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



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5. Finalize the Creation

1. Click Next:

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

2. Enter Object Settings:

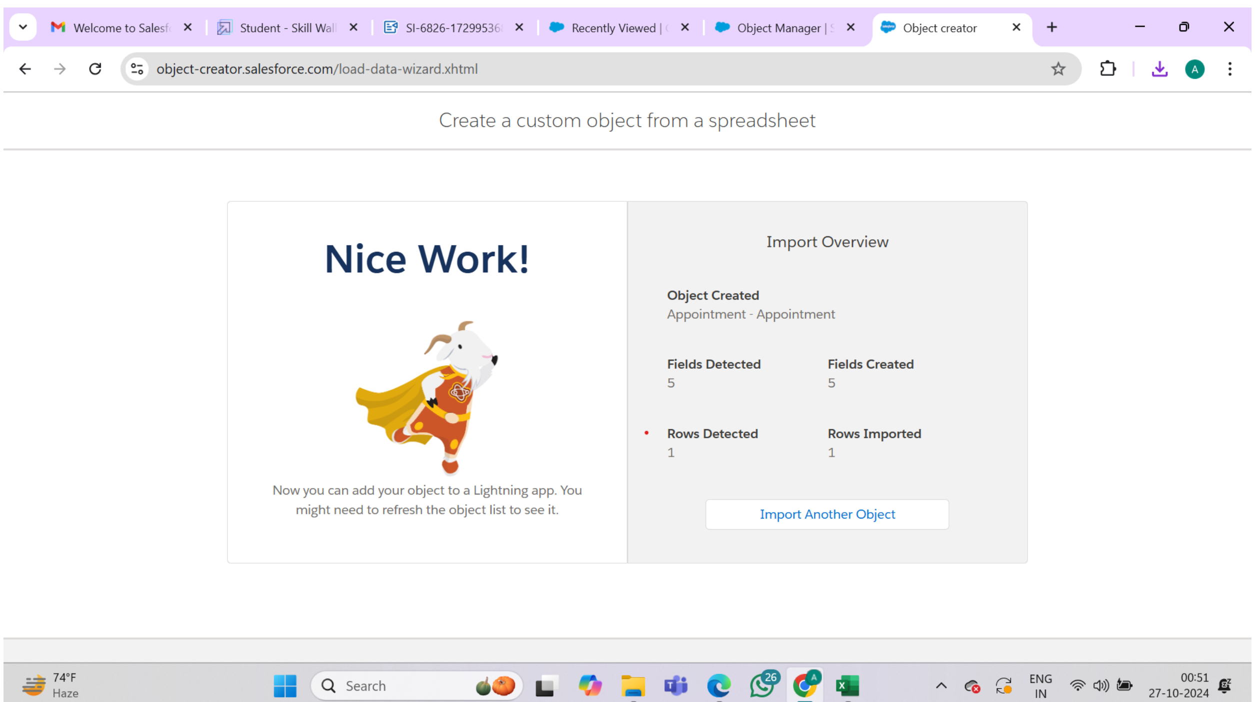
■ Configure the object settings, such as label, plural label, and other optional settings as needed.

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:

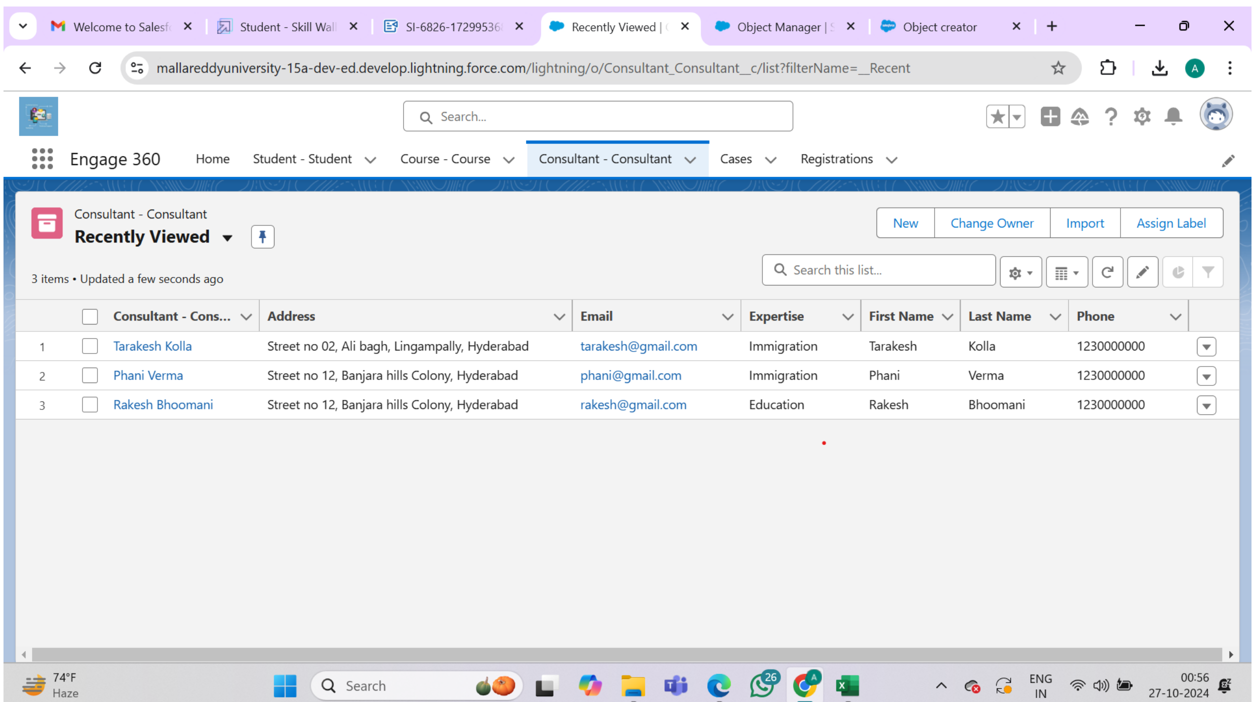
■ Salesforce automatically detects the fields from the CSV file and populates the record data.

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



5. Finalize the Creation

1. Click Next:

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

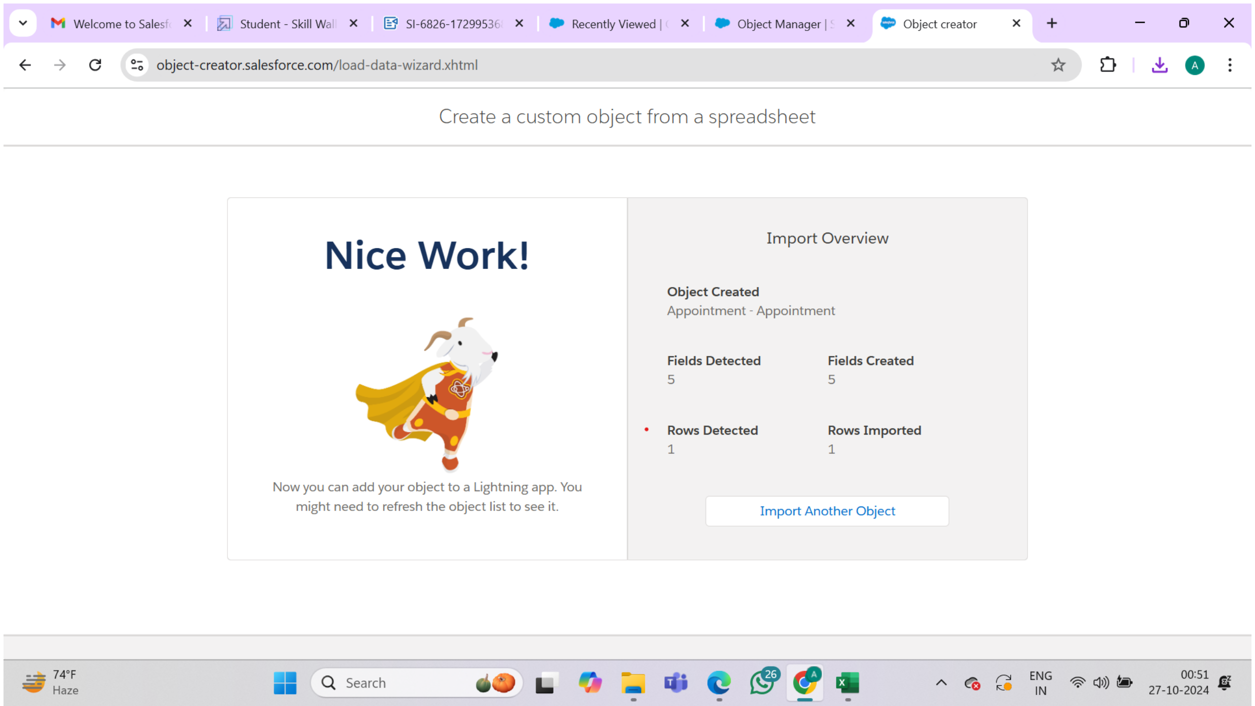
2. Enter Object Settings:

■ 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:

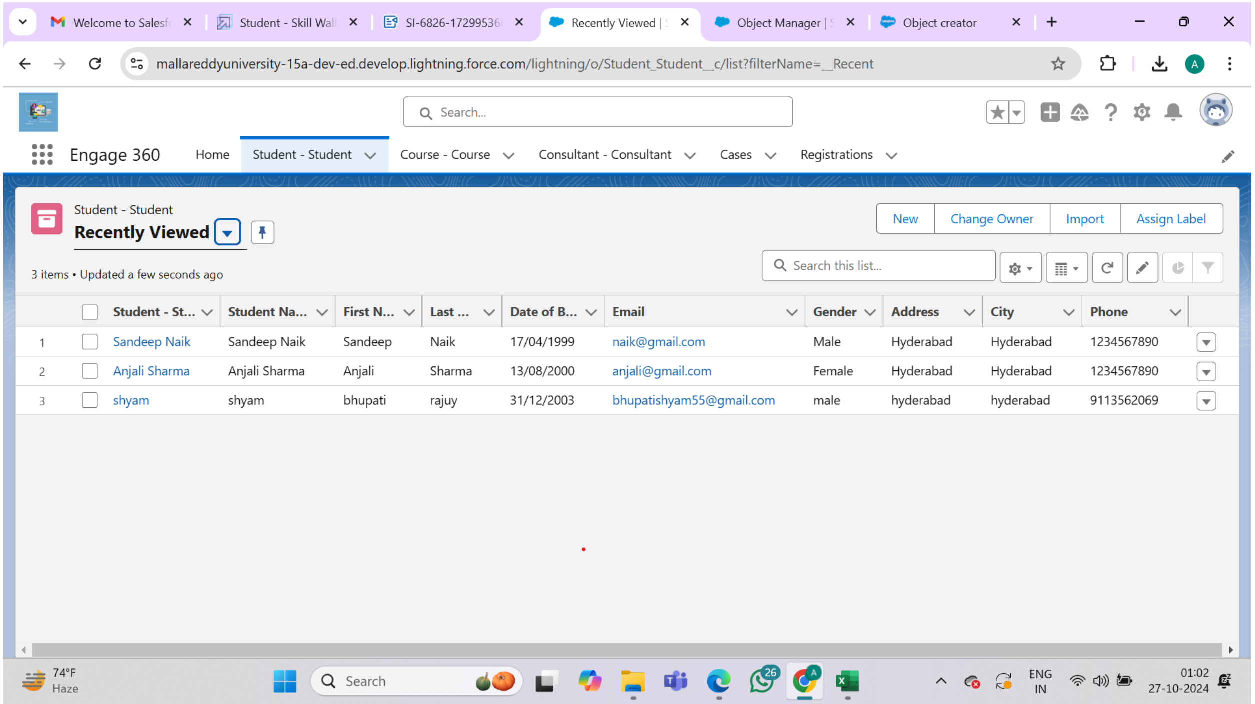
■ Salesforce automatically detects the fields from the CSV file and populates the record data.

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



5. Finalize the Creation

1. Click Next:

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

2. Enter Object Settings:

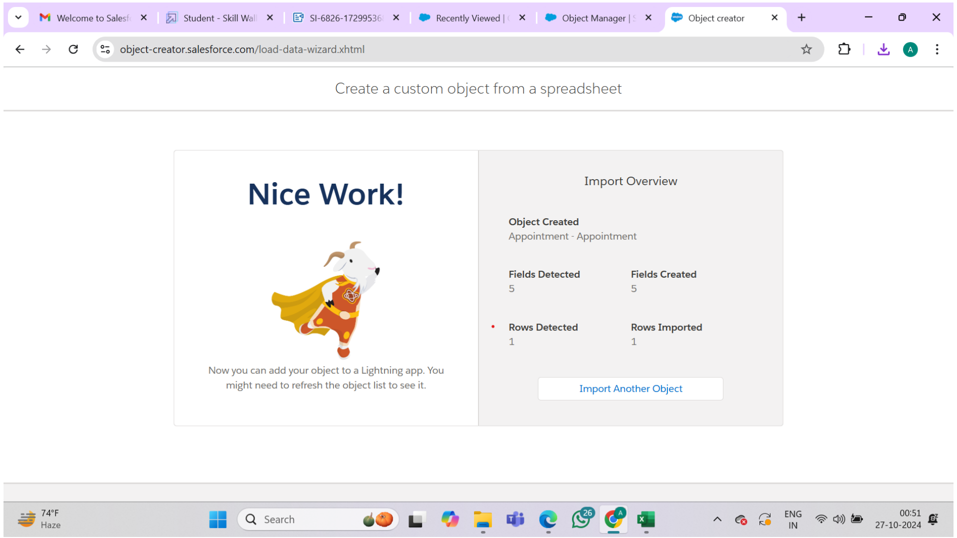
■ Configure the object settings, such as label, plural label, and other optional settings as needed.

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 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:

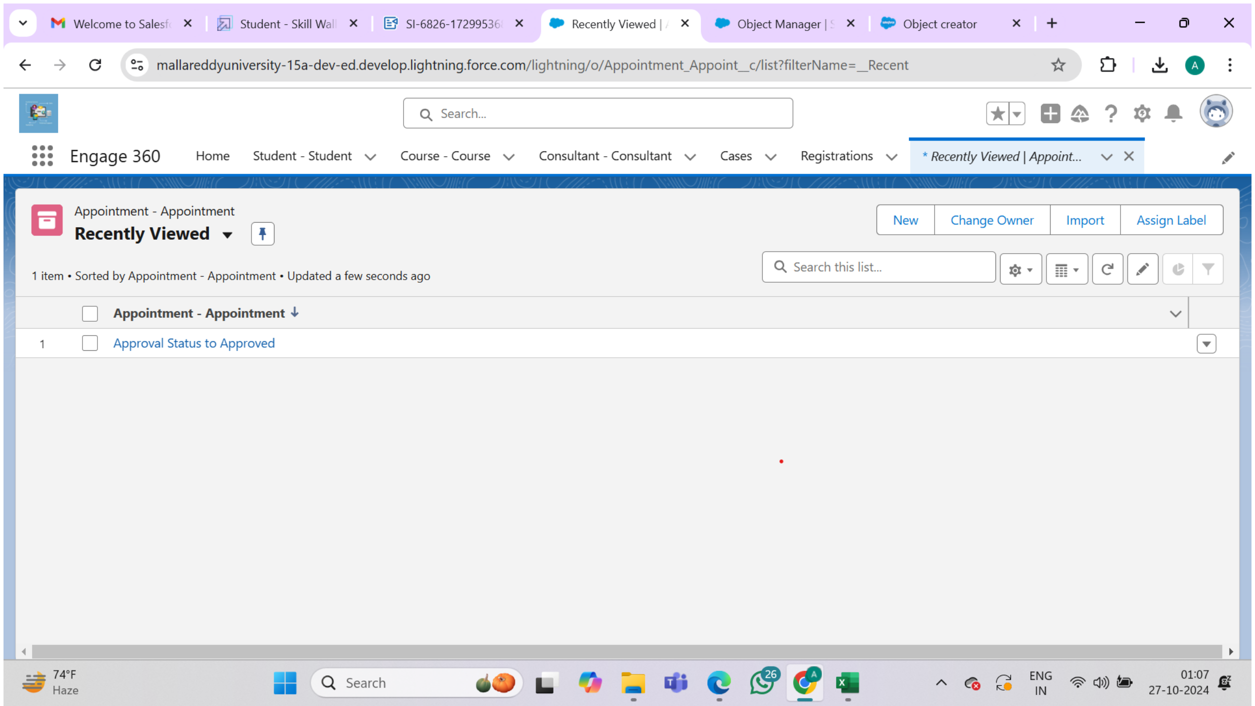
■ Salesforce automatically detects the fields from the CSV file and populates the record data.

4. Set Record Name Field:

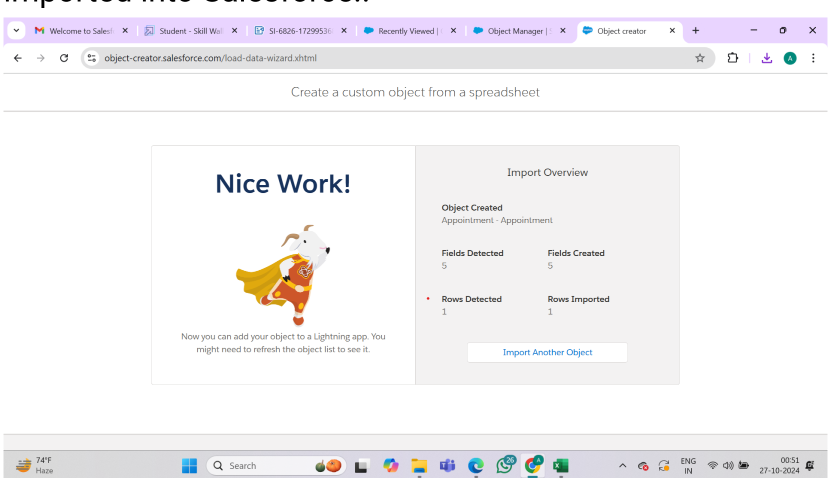
■ Choose "Appointment ID" as the Record Name field.

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.

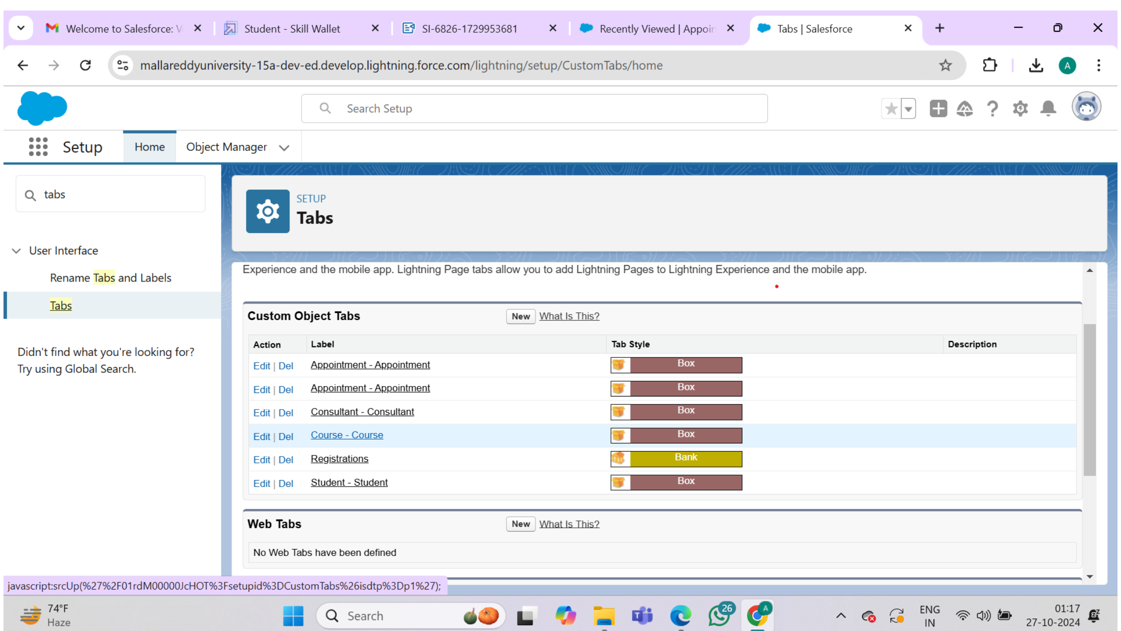
● Add the Tab to Custom Apps:

■ 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

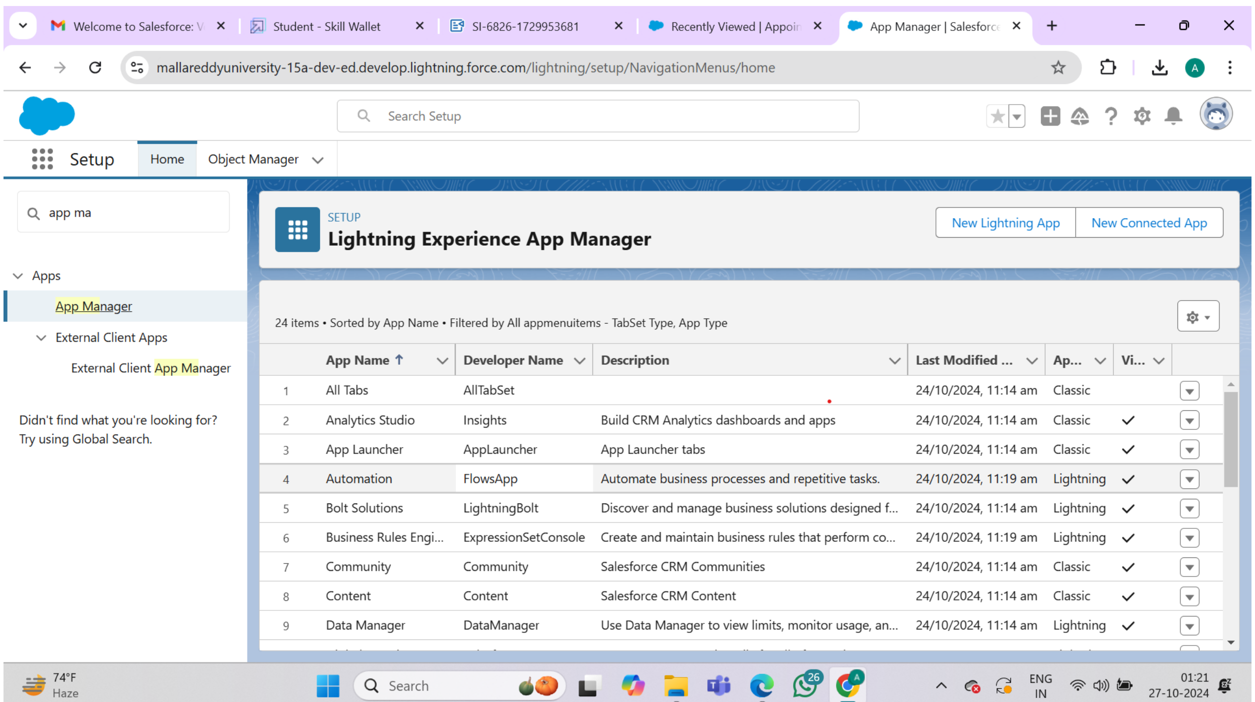
1. Access App Manager:

● 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.



3. Fill in App Details and Branding:

● App Name: Enter Engage 360.

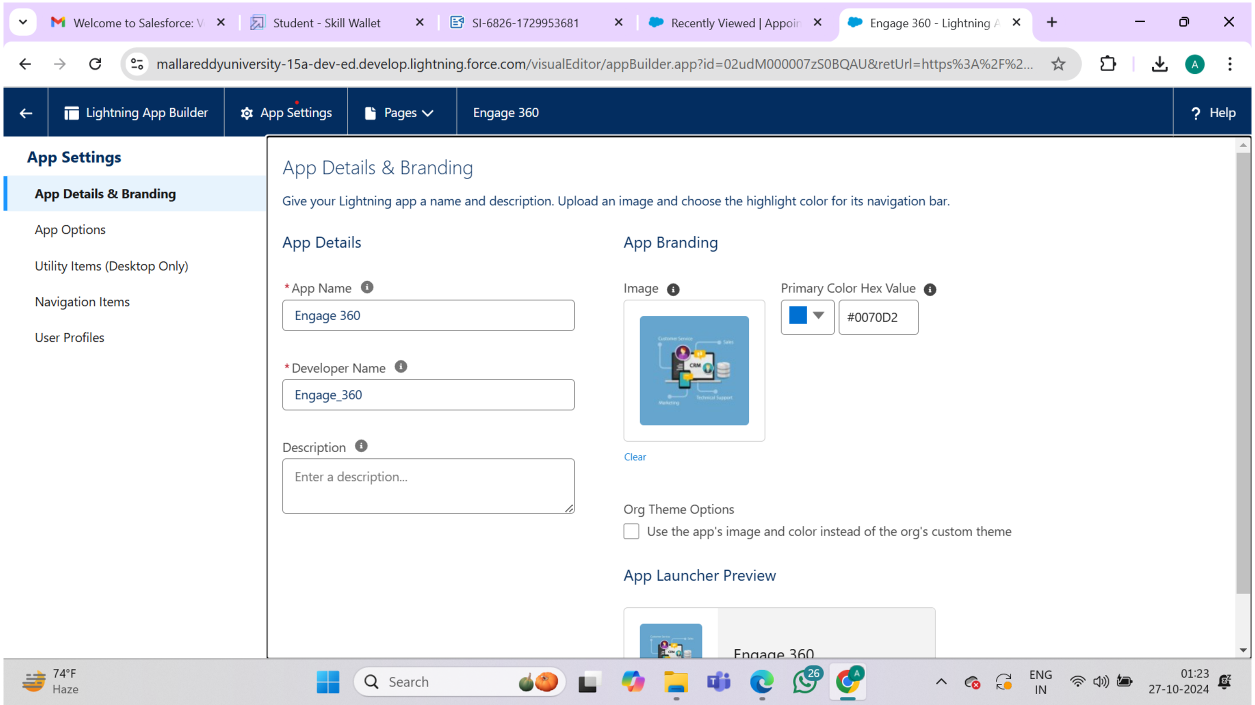
● Developer Name: This field will auto-populate.

● 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

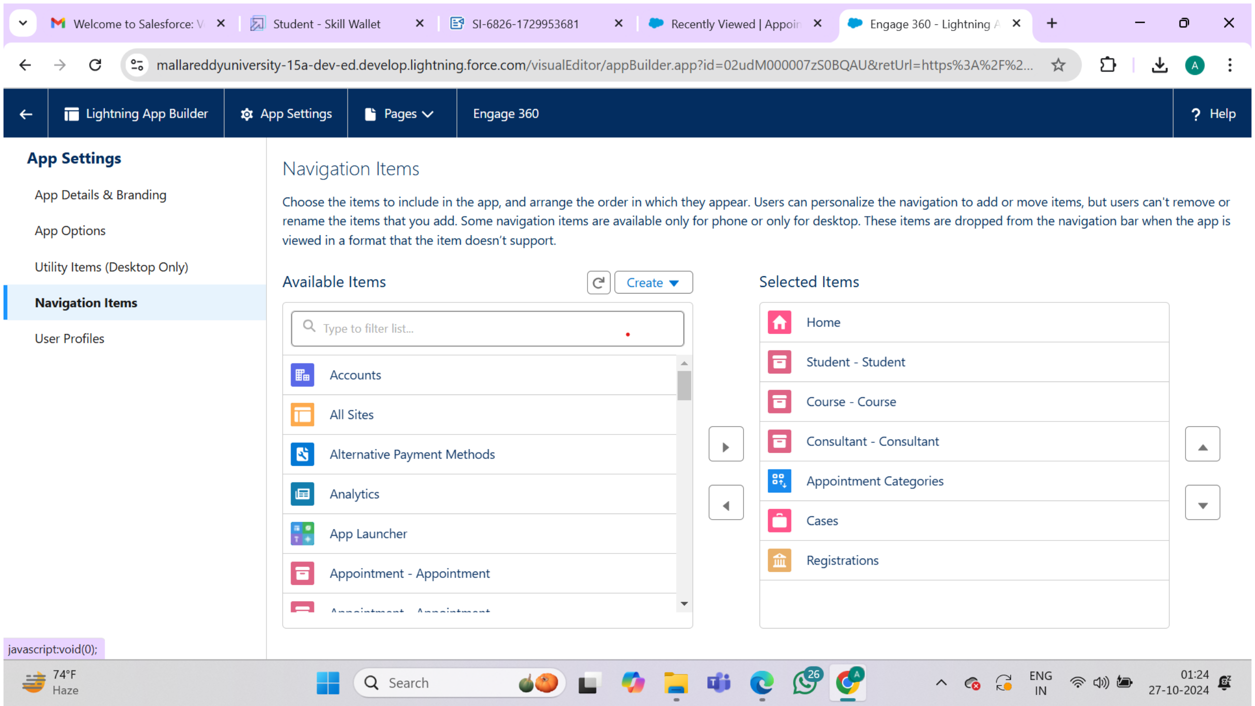
■ Consultant

■ Dashboard

● Select each item and move it to the selected items section using the arrow button.

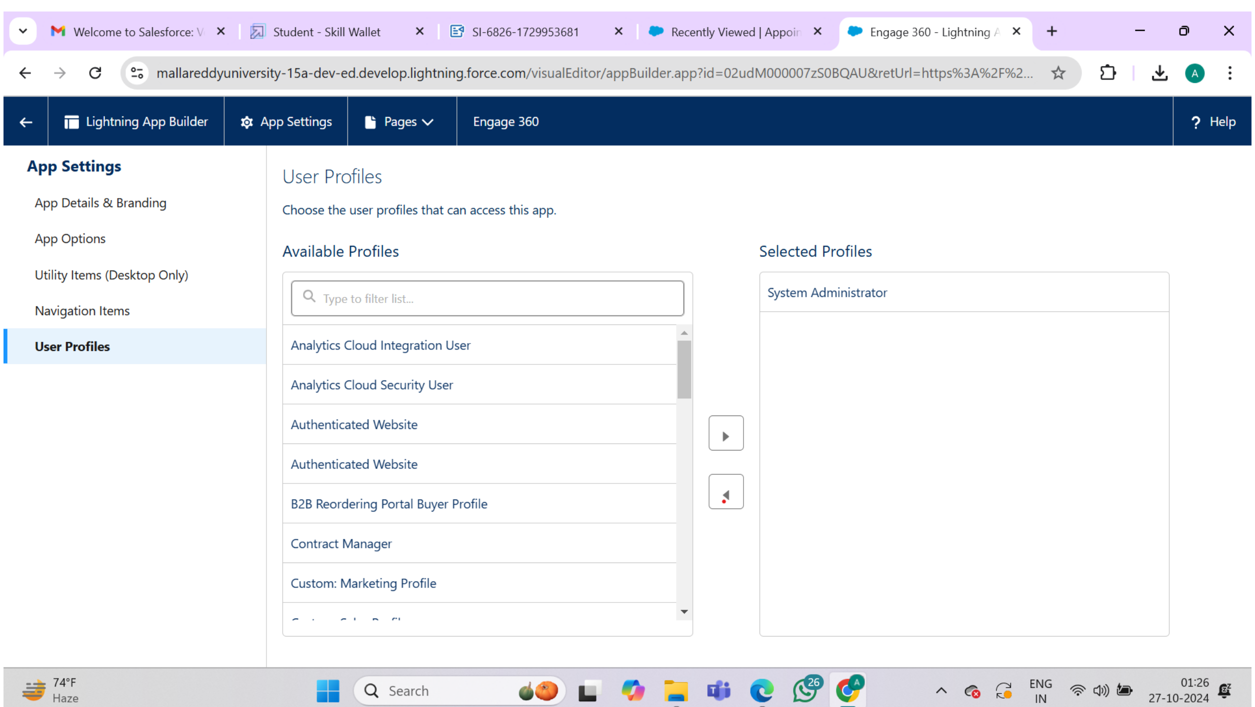
● Note: Make sure to select the Registration custom object that you created in the Task 2 (Registration Object Creation).

● Click Next to continue.



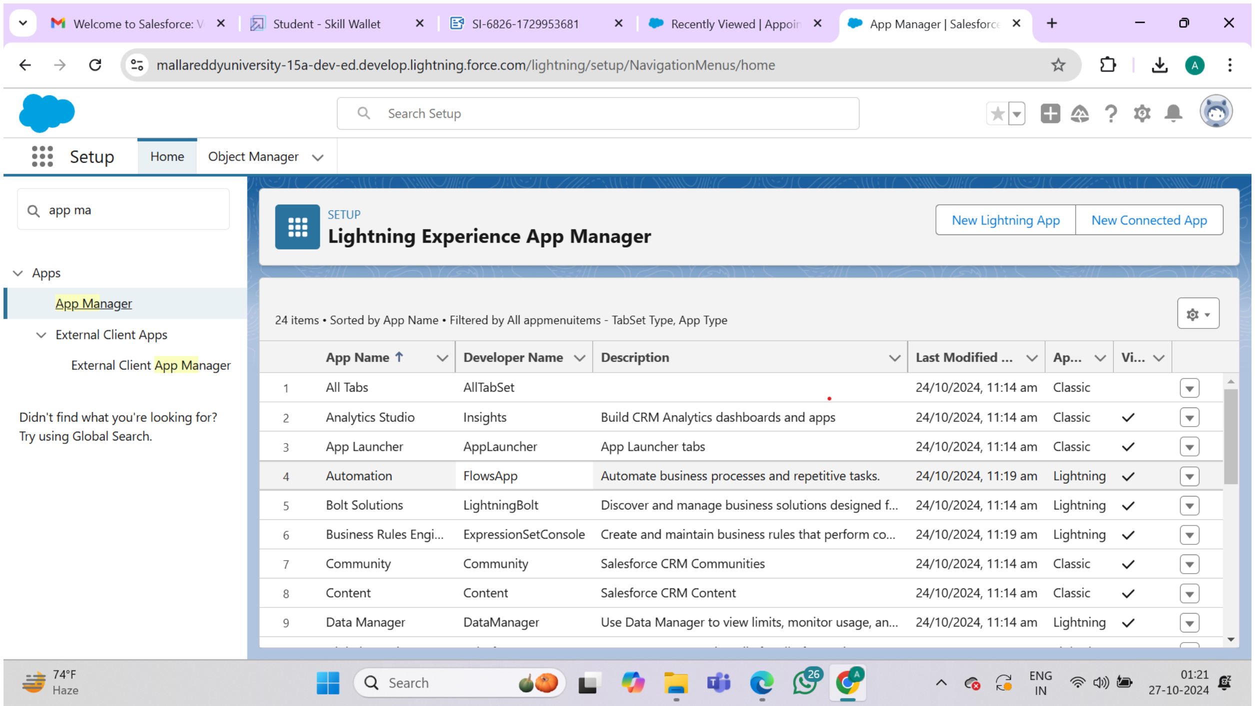
7. Add User Profiles:

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



8. Save & Finish:

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



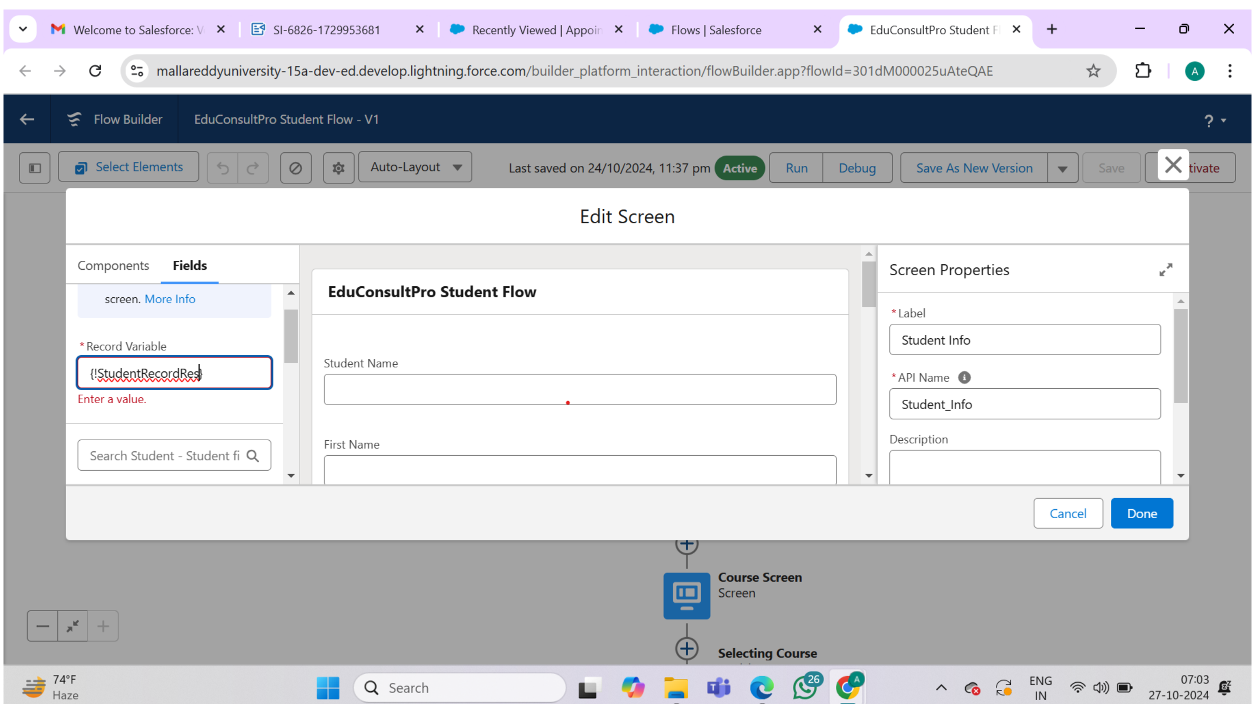
TASK-5

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.

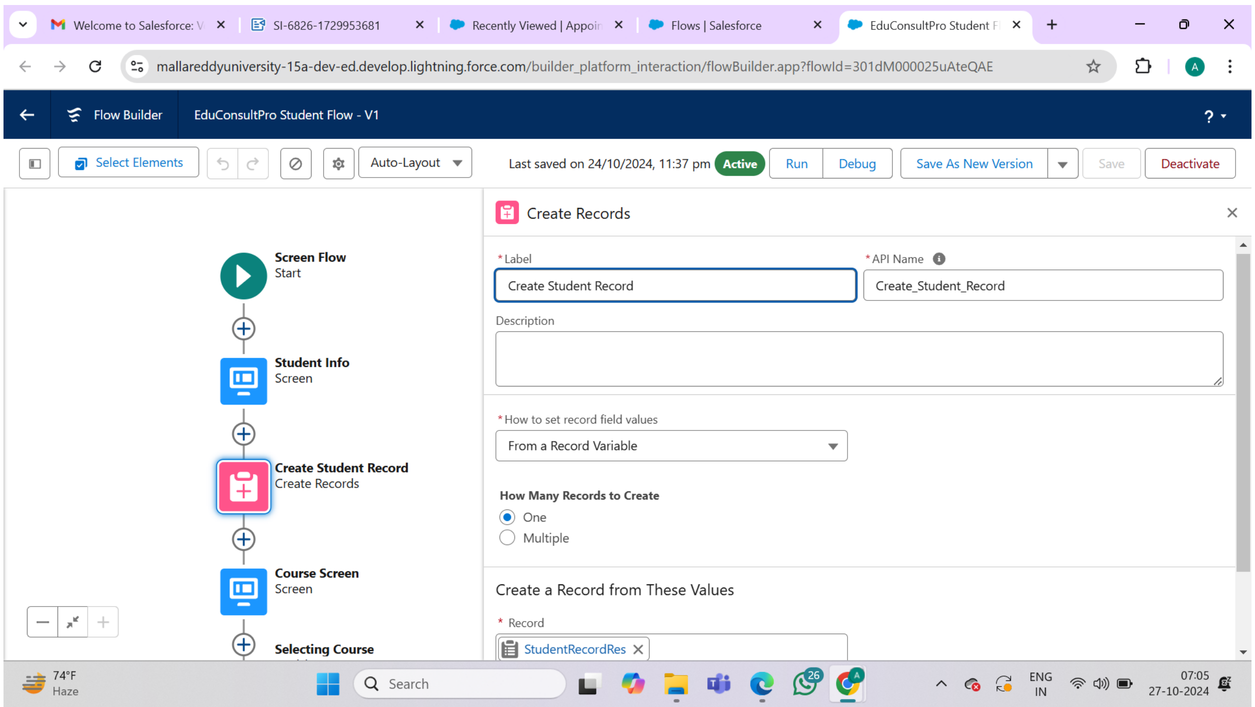


Create Student Record

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

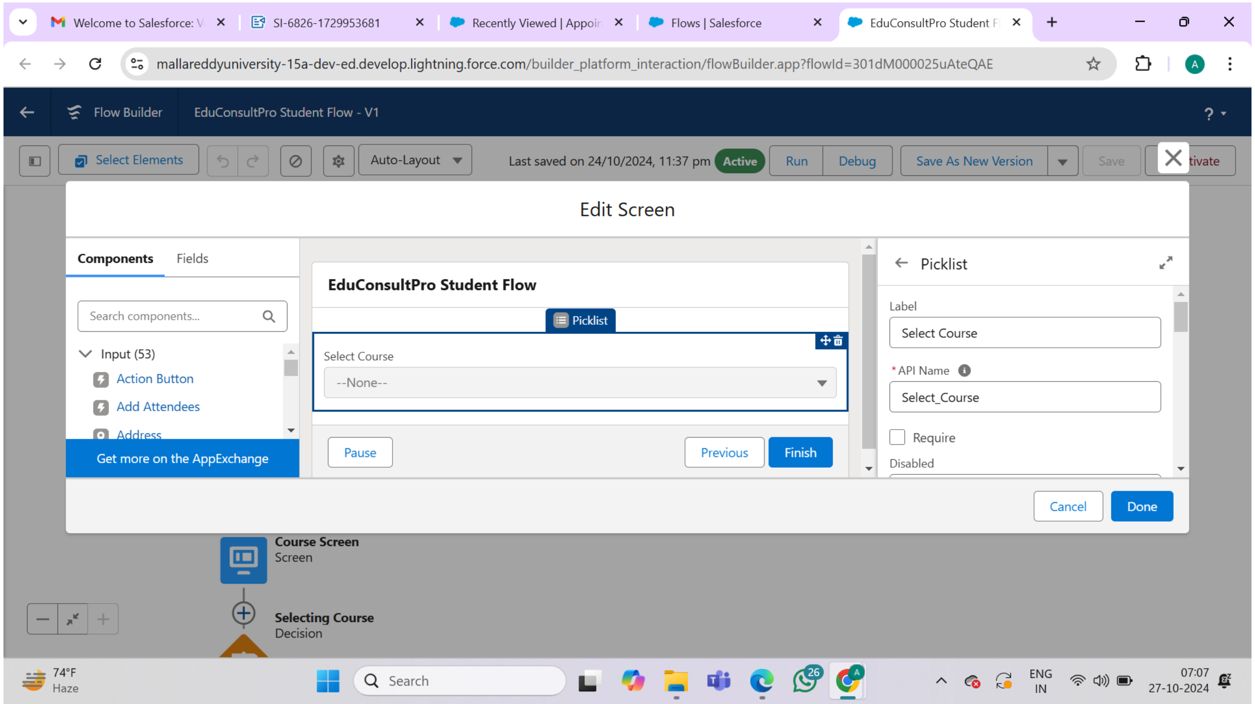
Student Record.”

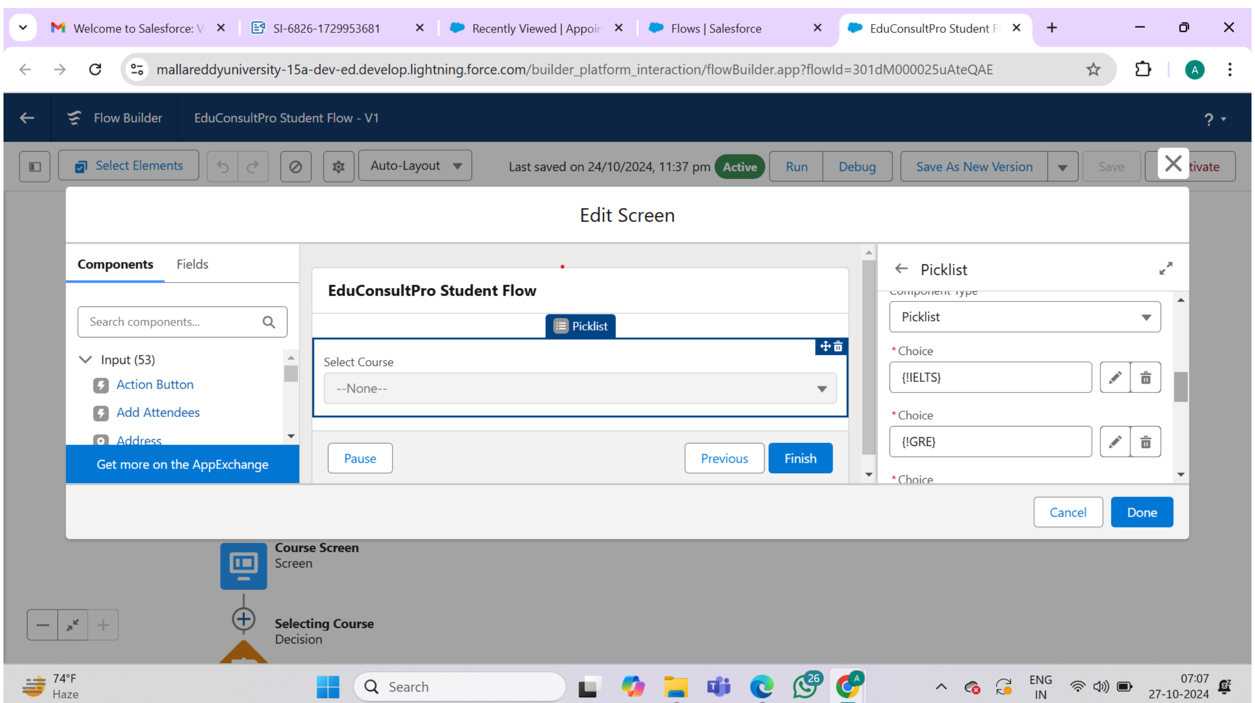
2. Select “one” under How many records to Create, and select “use all values from a record” under How to Set the record fields.
3. Select the record variable resource(StudentRecordRes) which we have created in the Student Info screen element, under Create a record from these values.



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

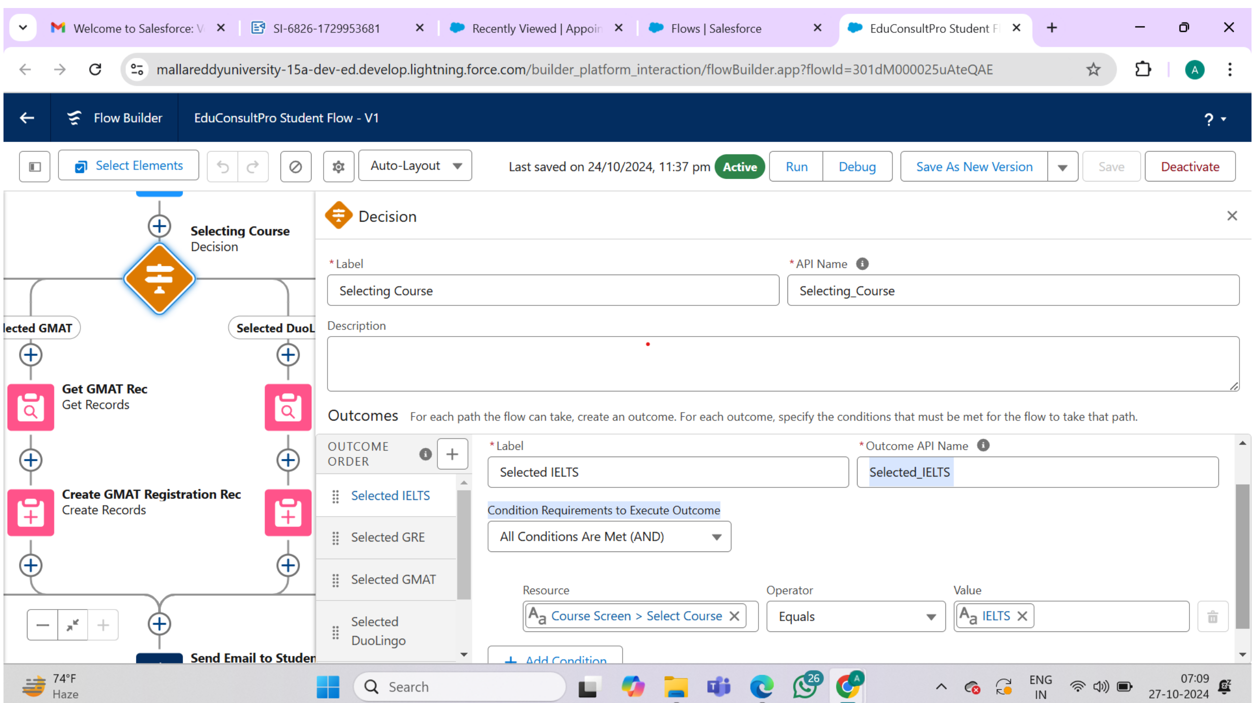
below:

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.



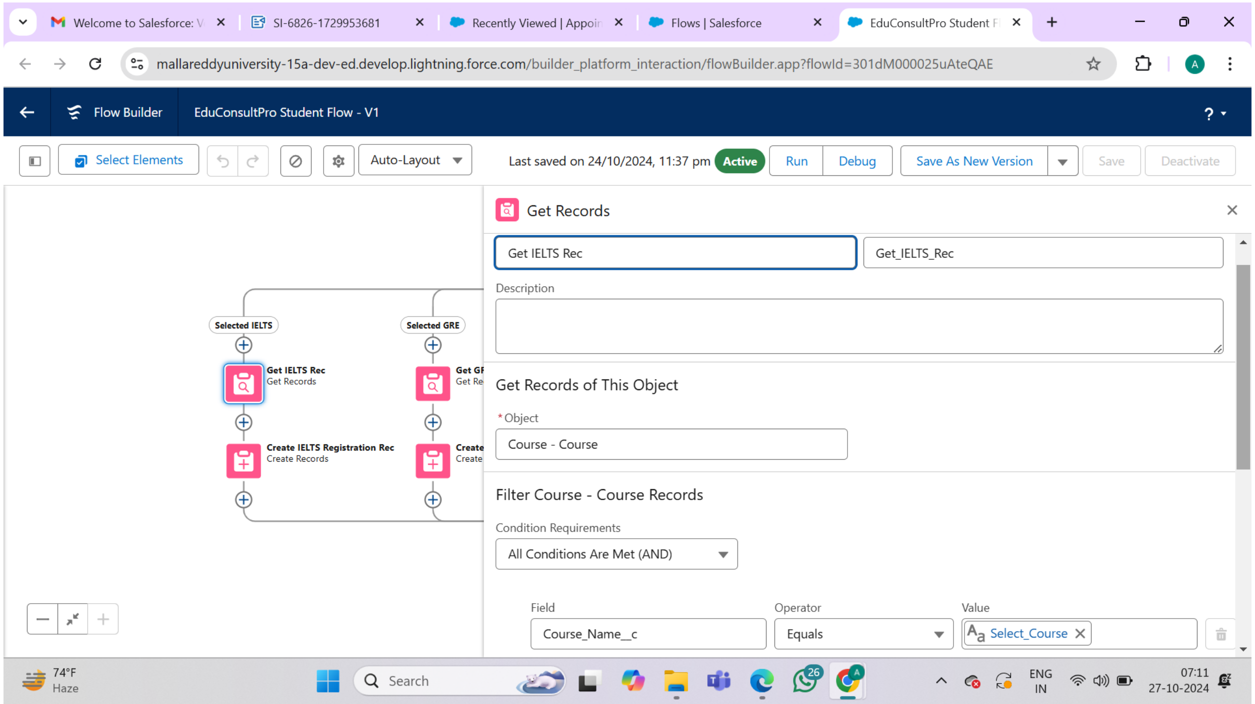
GET Record Element

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

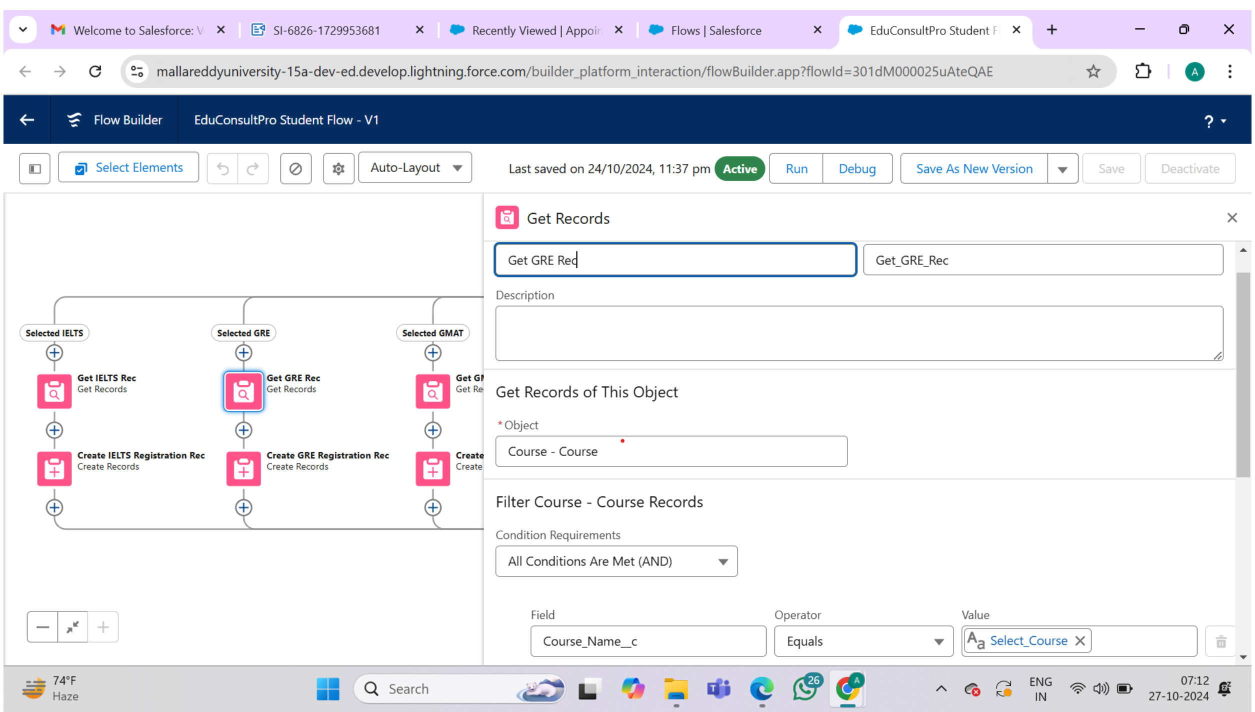
   Condition Requirement : All Conditions are Met(AND)
    1. Field : Course Name

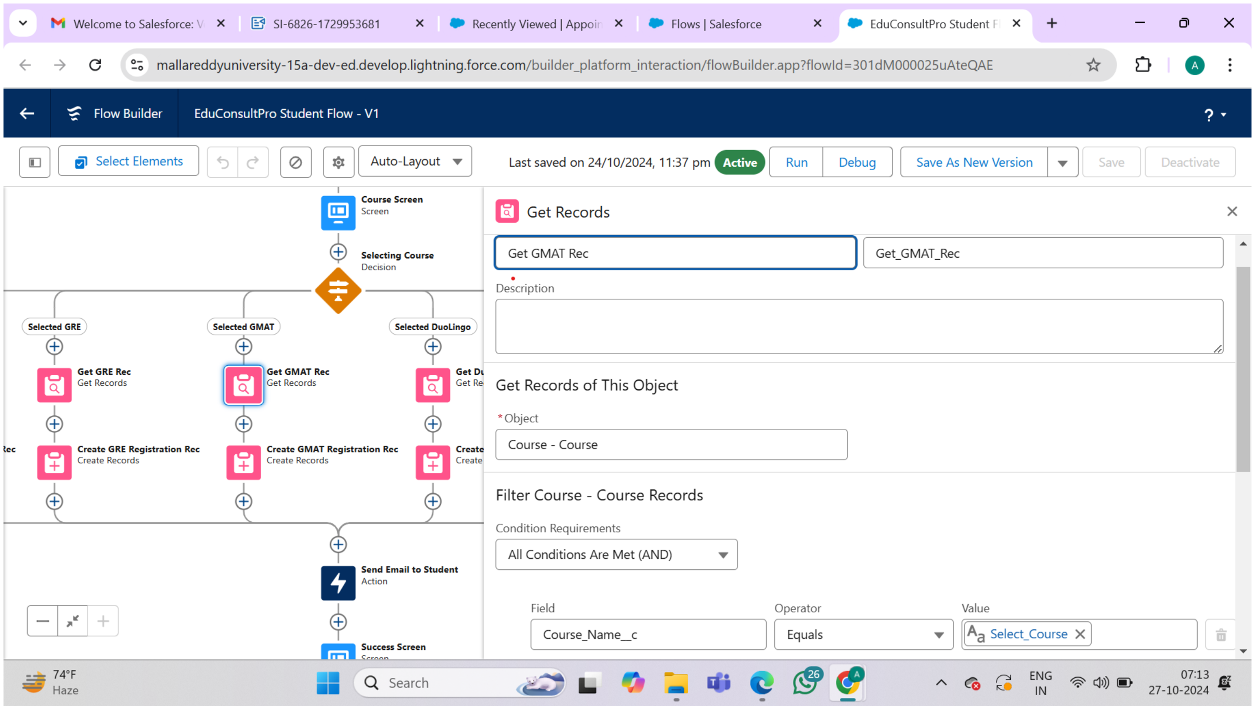
       Operator : Equals

Value : {!Select_Course



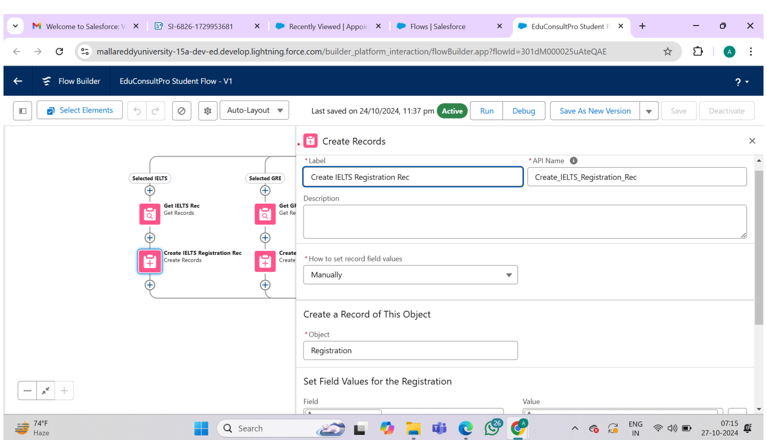
3. Repeat the steps 1 & 2 for the GRE, GMAT, TOEFL, DuoLingo paths.





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 : {!Get_IELTS_Rec.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.

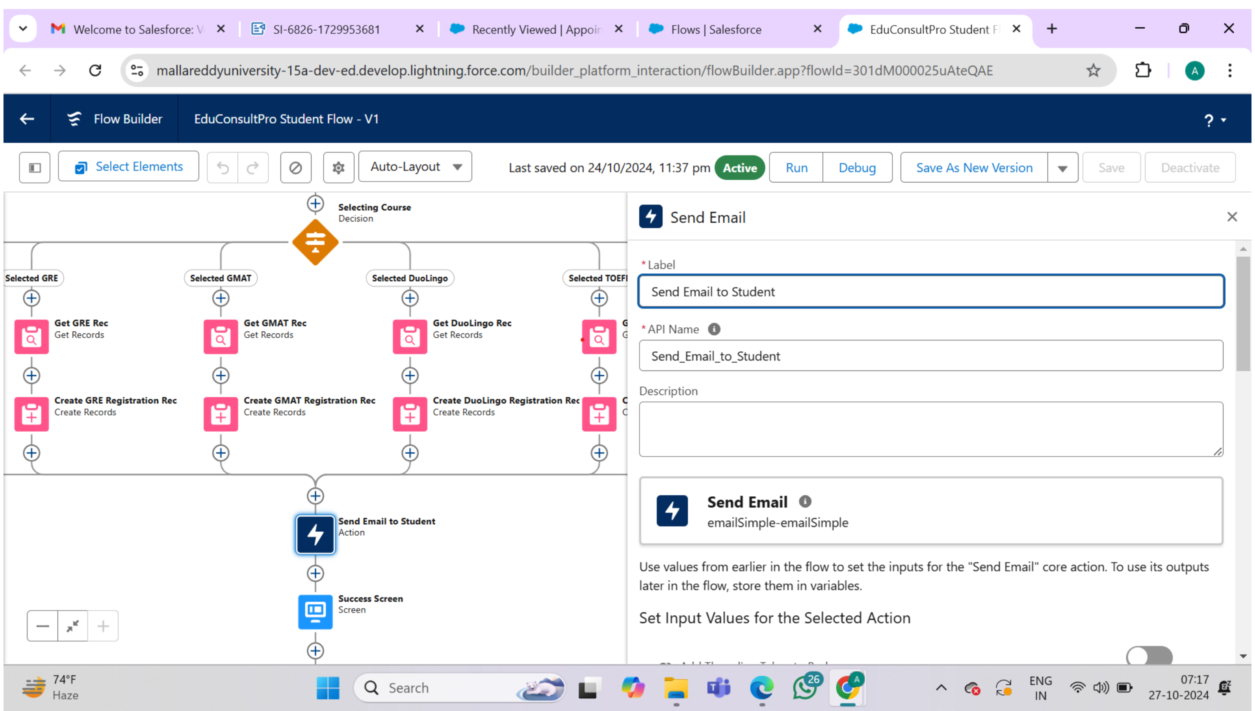
  At EduConsultantPro, we understand the importance of your academic and career goals, and we are committed to providing you with the highest level of support and guidance throughout your journey.
  Here are a few key points to help you get started:
  Explore Our Resources : Take some time to explore the 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."

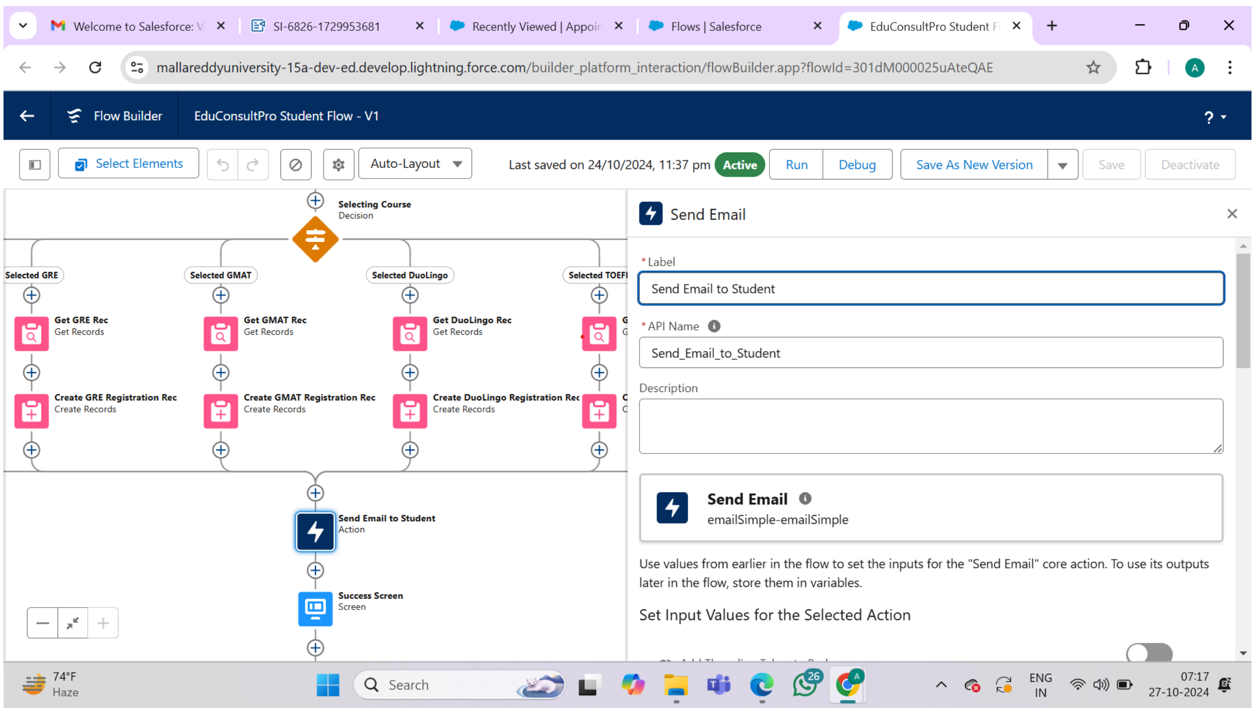
- Click Done.



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},

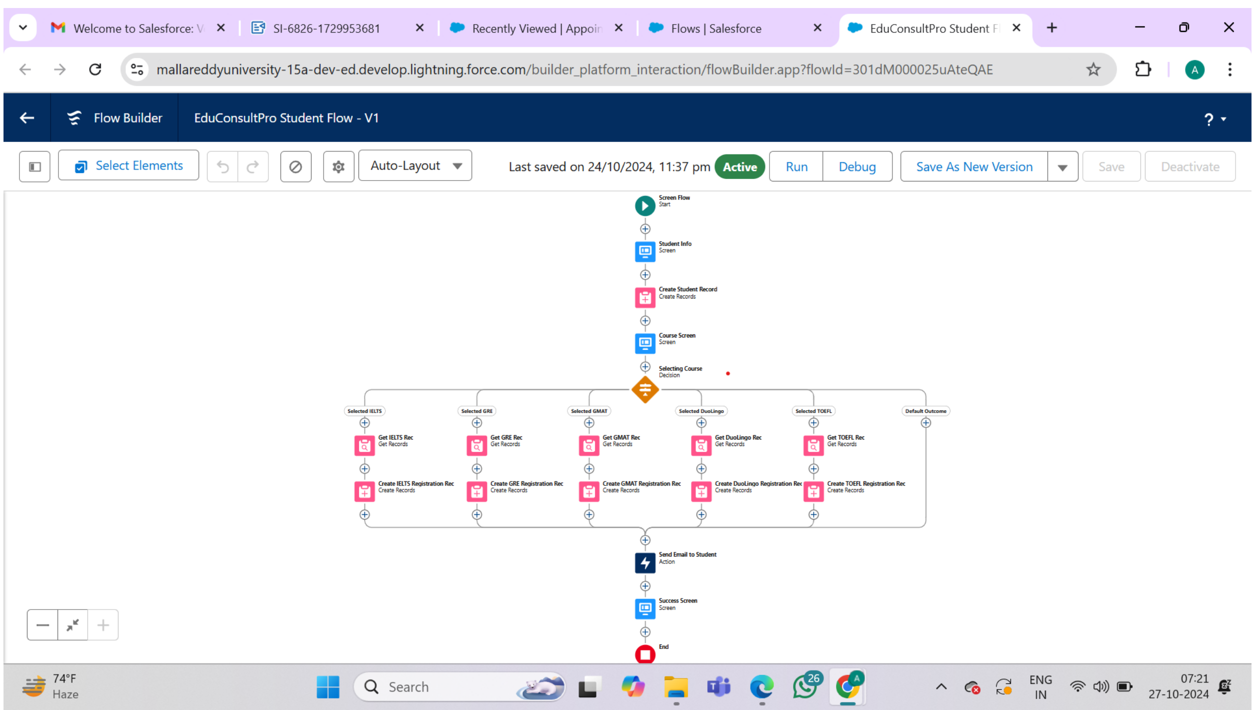
   Congratulations and welcome to EduConsultantPro!

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:

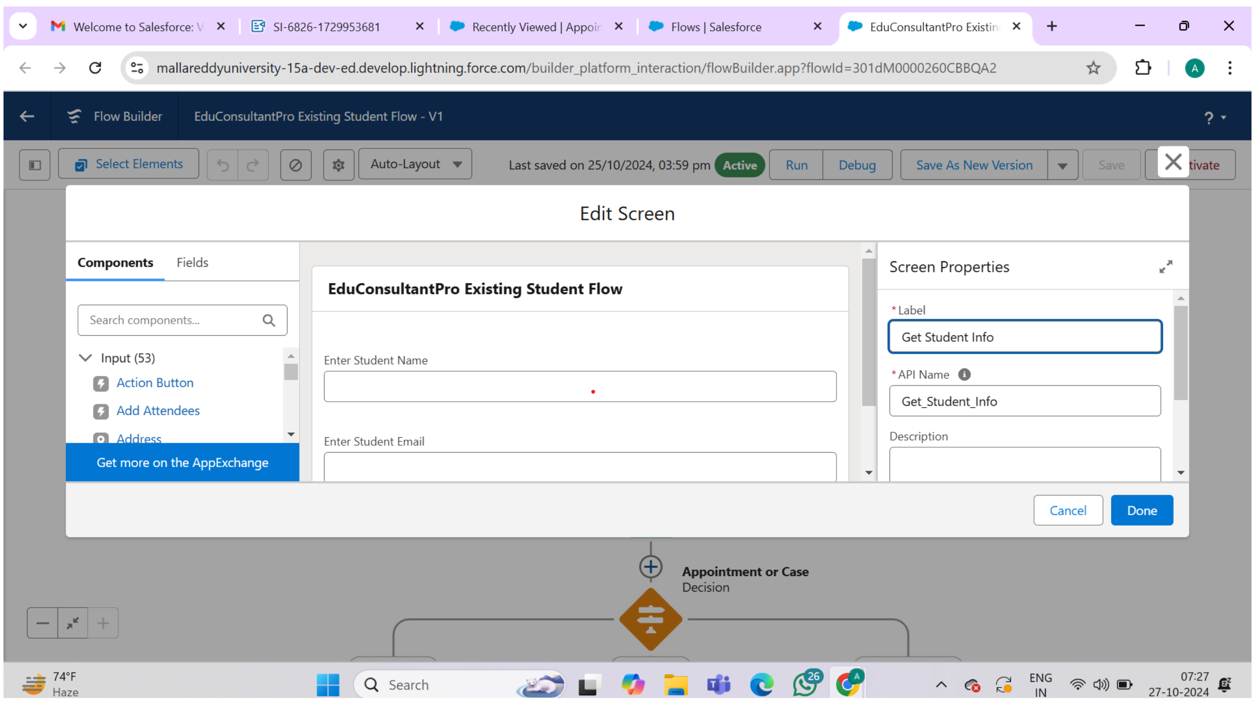


➤ ScreenFlow for Existing Student to Book an Appointment

Add Screen Element

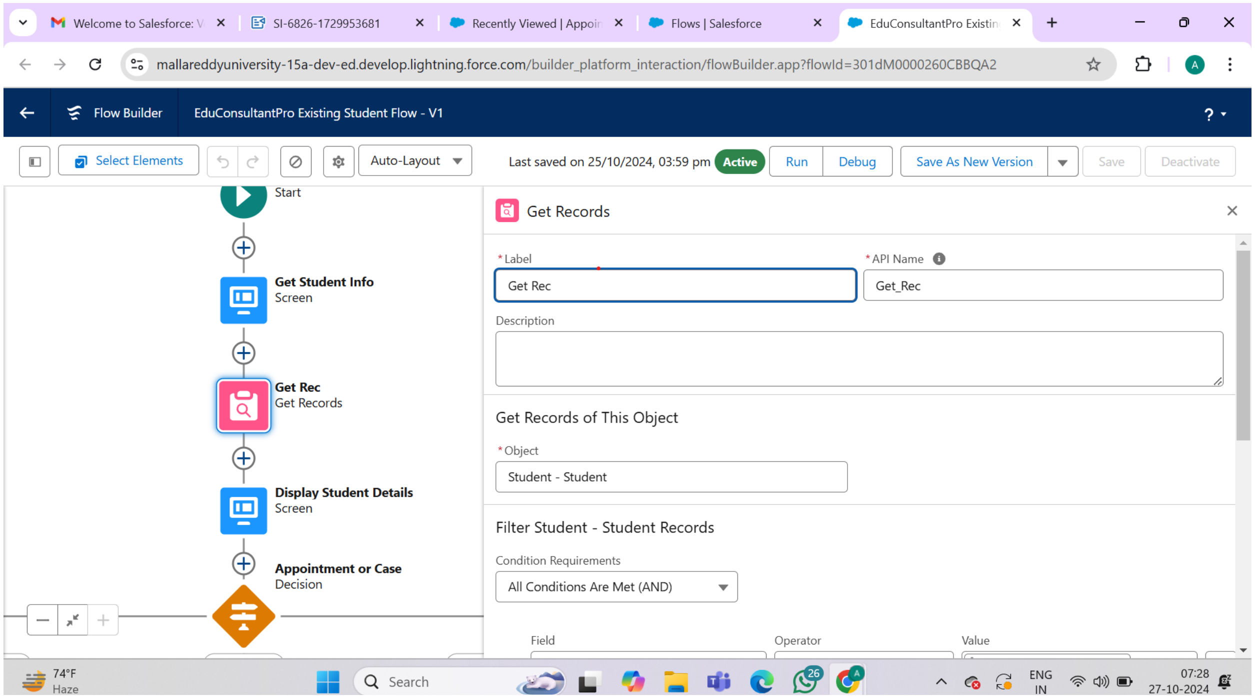
1. From Setup, enter Flow Builder in quick find, select new flow ? ScreenFlow.

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}



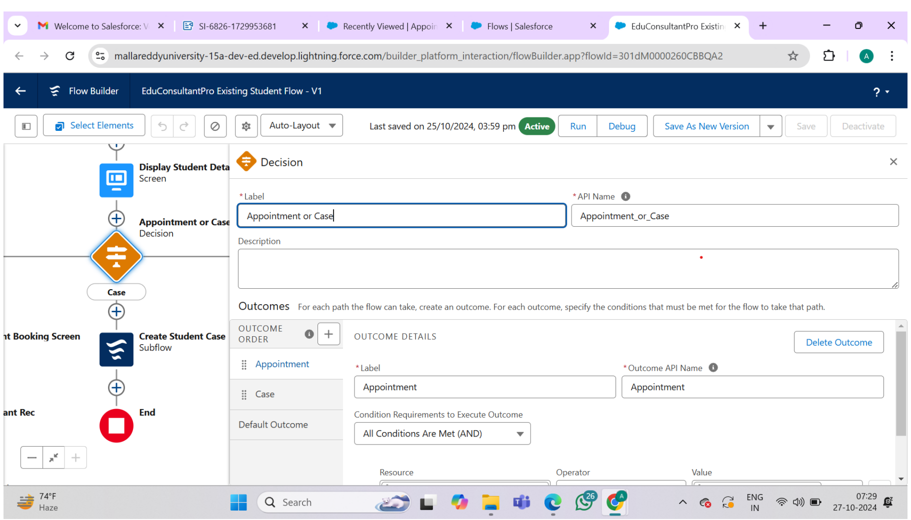
Add Decision Element

- 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}

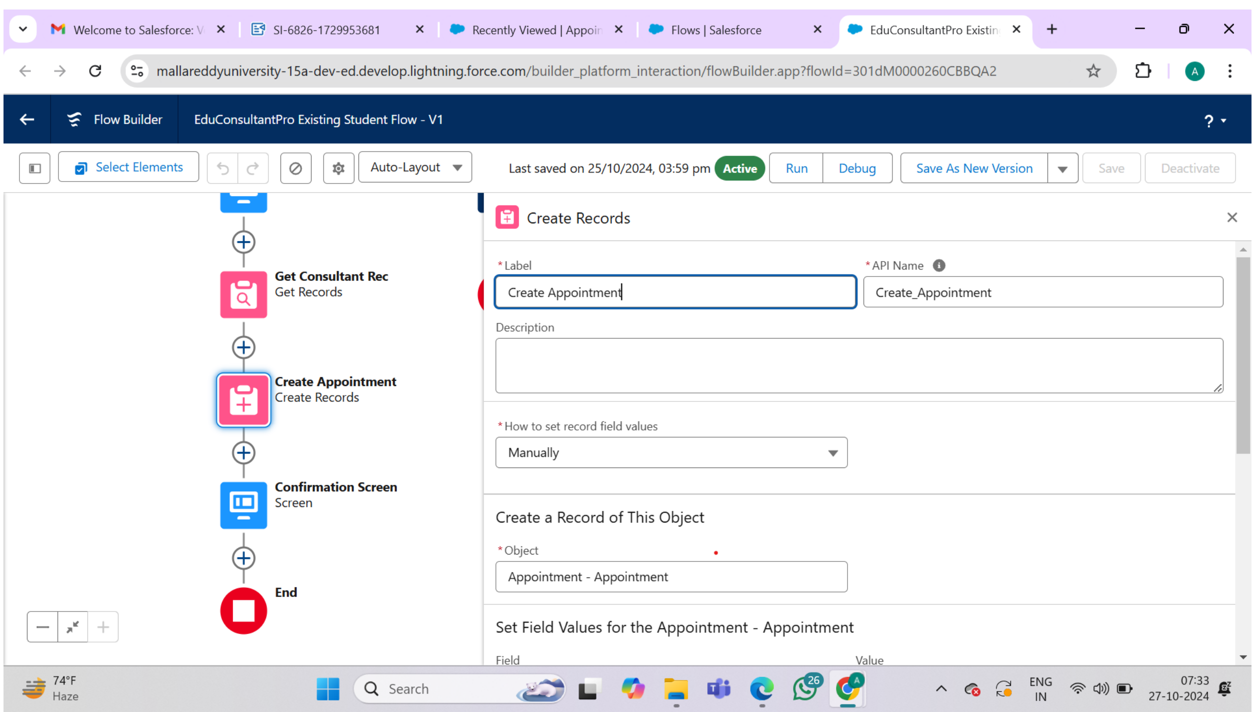
  Operator : Equals

  Value : {!Book_an_Appointment}
- Click on the "+" icon and Repeat step 2 for Case options mentioned.



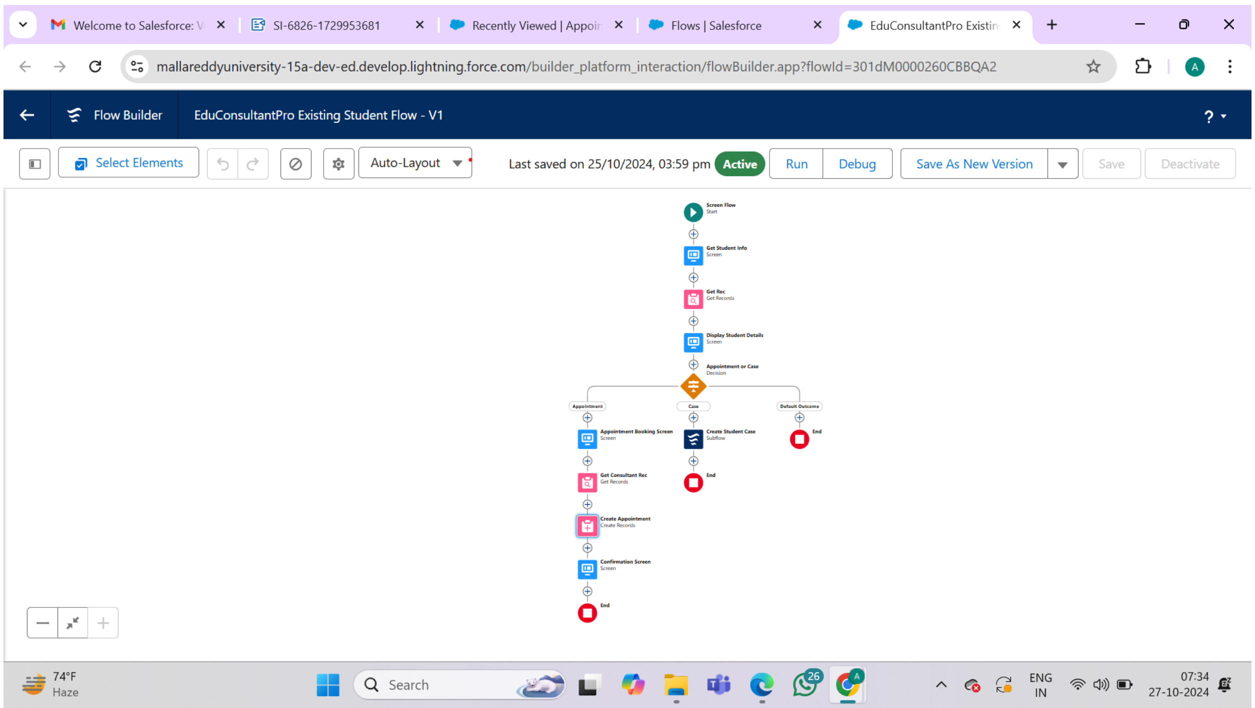
Create Appointment Record

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_Consultant_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.

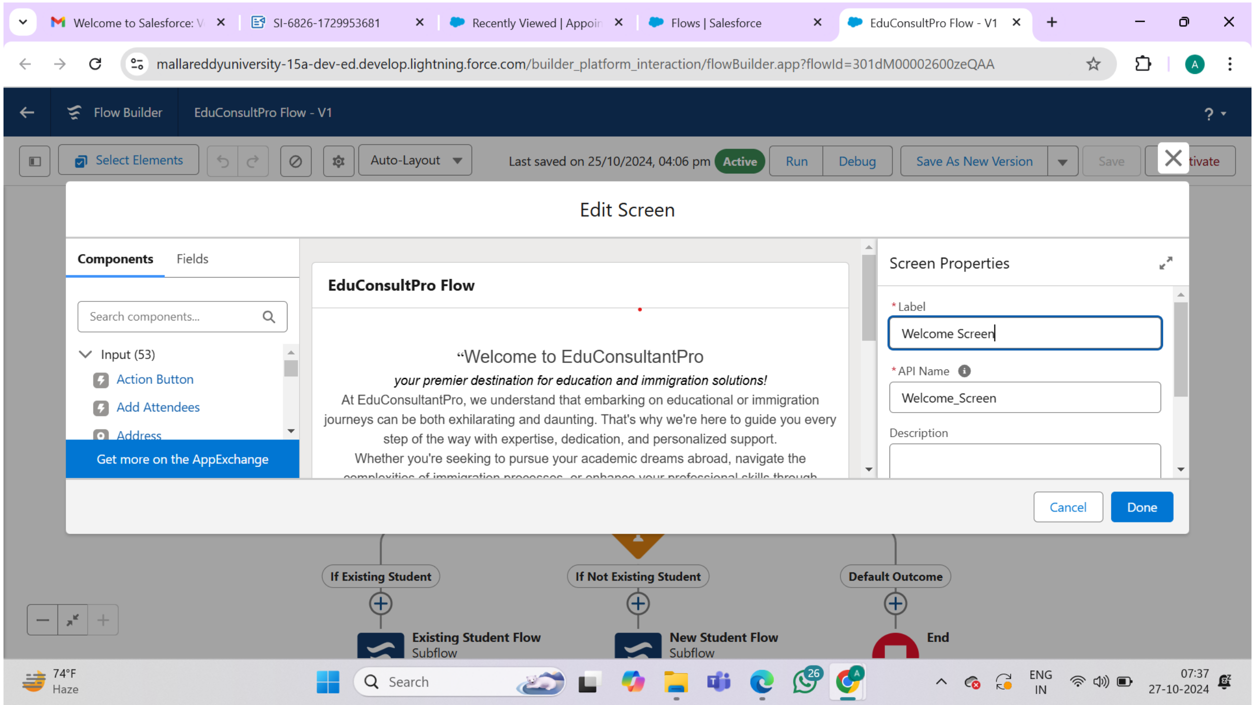
Whether you're seeking to pursue your academic dreams abroad, navigate the complexities of immigration processes, or enhance your professional skills through international opportunities, EduConsultantPro is your trusted partner.

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.



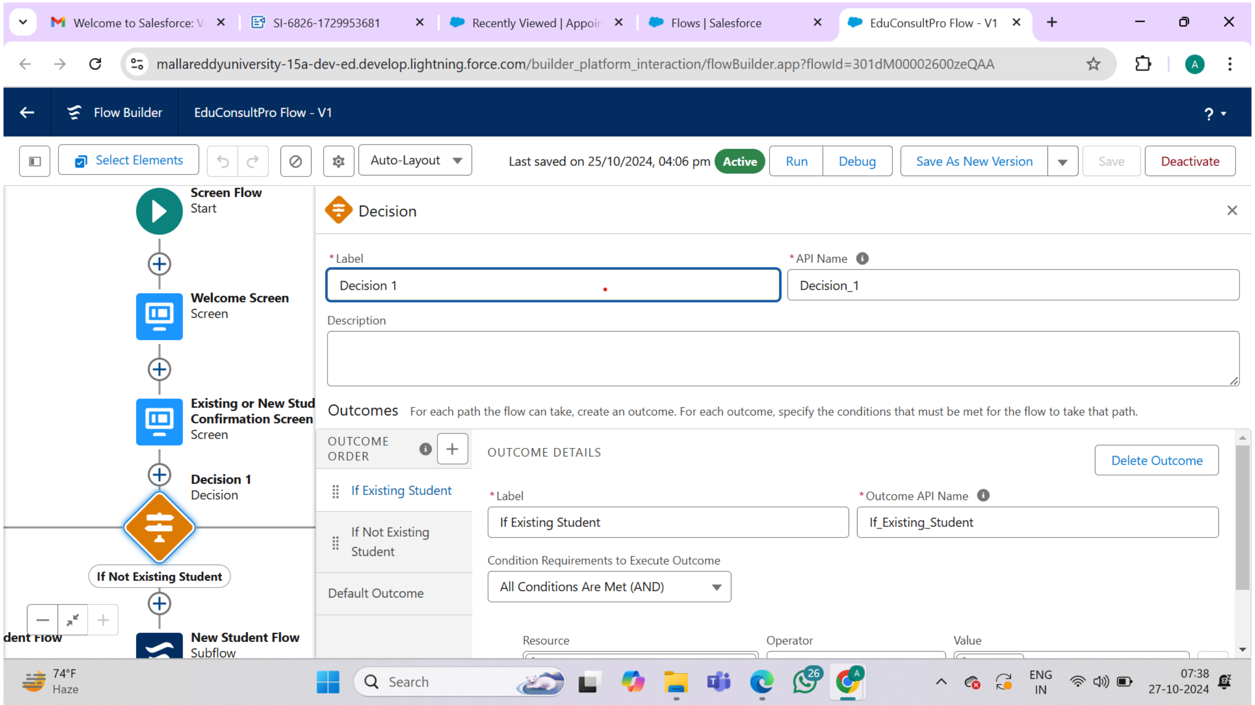
Add Decision Element

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}

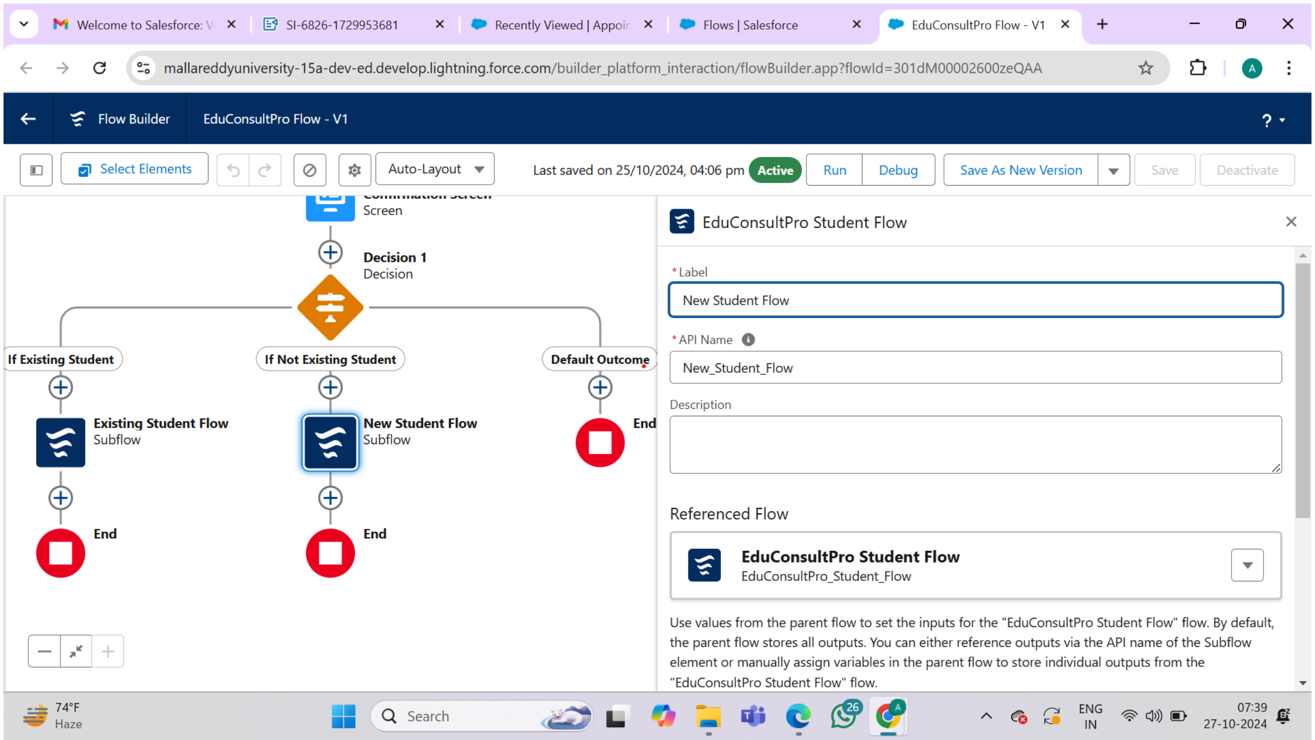
   Operator : Equals

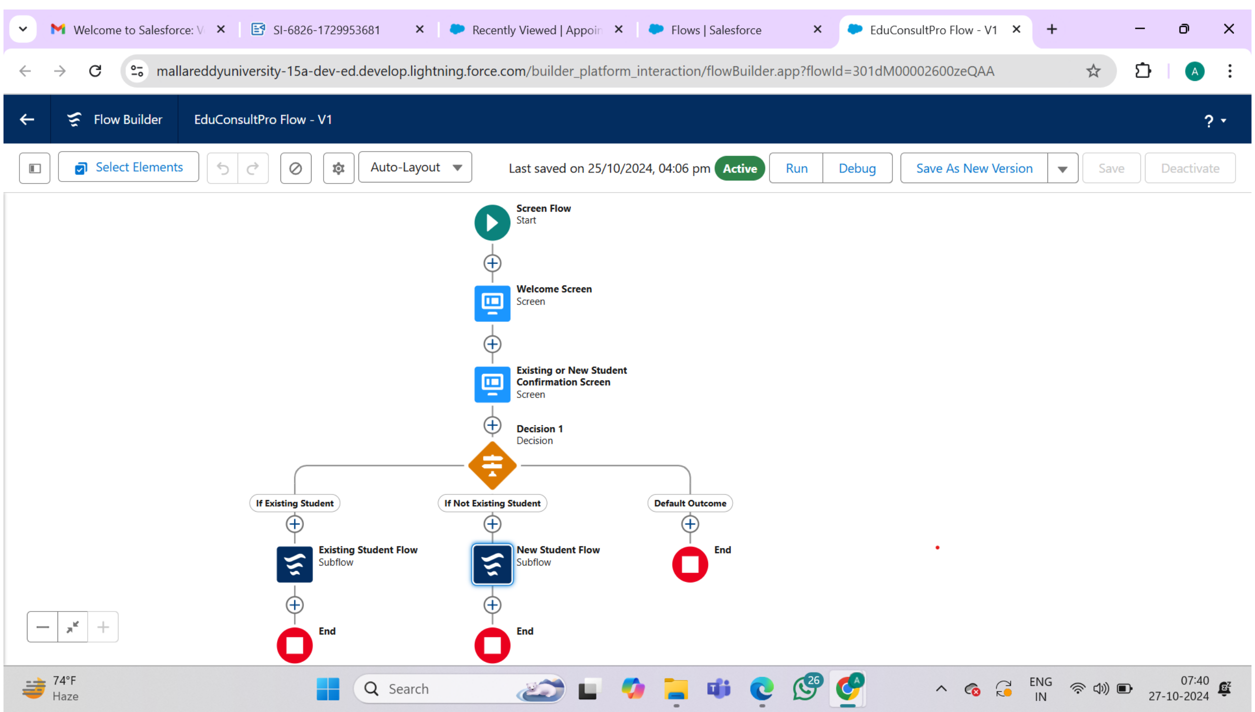
   Value : {!Yes}
3. Click on the “+” icon and Repeat step 2 for No options mentioned.



Add an SubFlow Element

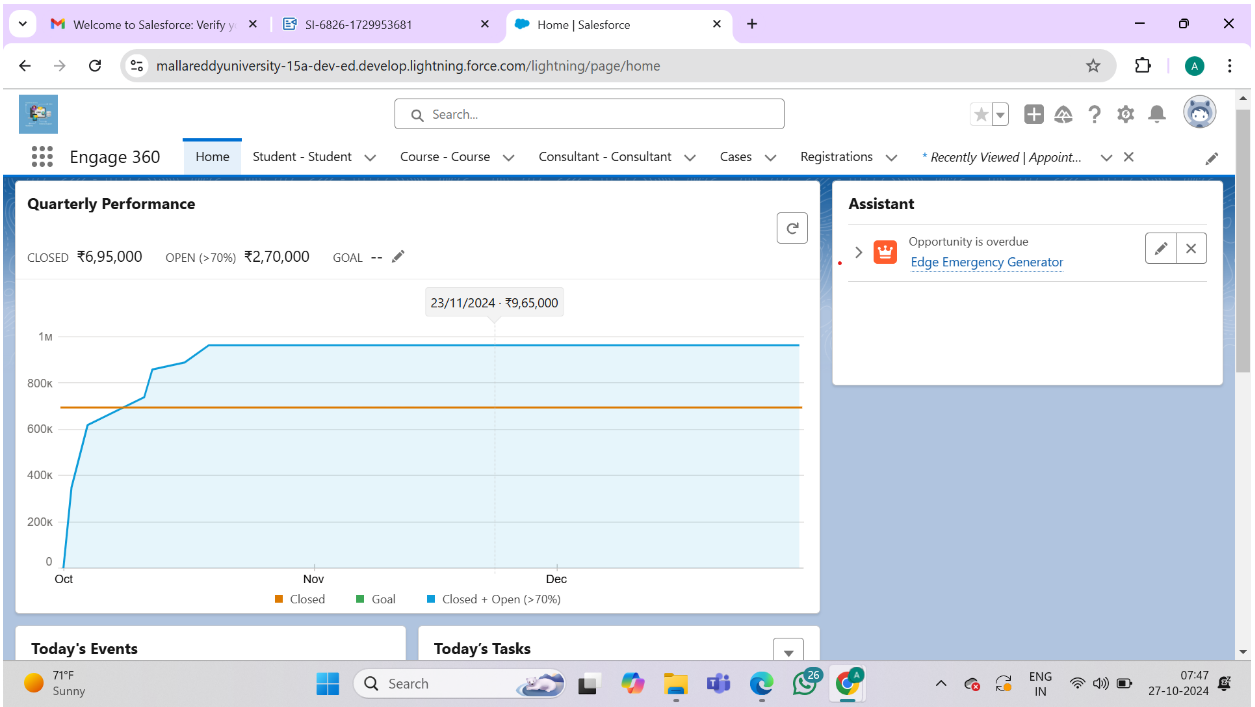
1. Add a subflow element after the Decision 1 Element on the if Existing Student path and search and Select for “EduConsultantPro Existing Student Flow ", label it as “Existing Student Flow”.
2. Save the flow and label it as “EduConsultantPro Existing Student Flow”.

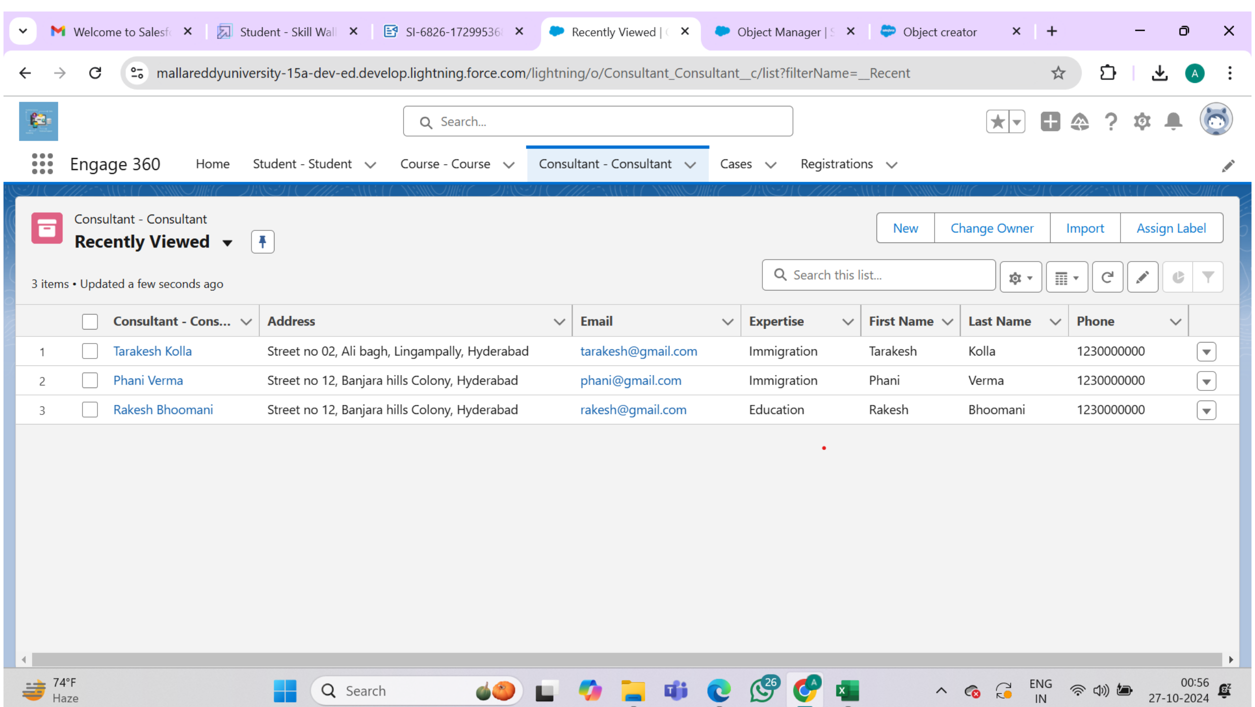

Flow Builder
EduConsultPro Flow - V1
Select Elements
Auto-Layout
Last saved on 25/10/2024, 04:06 pm
Active
Run
Debug
Save As New Version
Save
Deactivate
Screen
Decision 1
Decision
If Existing Student
If Not Existing Student
Default Outcome
Existing Student Flow
Subflow
New Student Flow
Subflow
End
EduConsultPro Student Flow
* Label
New Student Flow
* API Name
New_Student_Flow
Description
Referenced Flow
EduConsultPro Student Flow
EduConsultPro_Student_Flow
Use values from the parent flow to set the inputs for the "EduConsultPro Student Flow" flow. By default, the parent flow stores all outputs. You can either reference outputs via the API name of the Subflow element or manually assign variables in the parent flow to store individual outputs from the "EduConsultPro Student Flow" flow.


Flow Builder
EduConsultPro Flow - V1
Select Elements
Auto-Layout
Last saved on 25/10/2024, 04:06 pm
Active
Run
Debug
Save As New Version
Save
Deactivate
Screen Flow
Start
Welcome Screen
Screen
Existing or New Student
Confirmation Screen
Screen
Decision 1
Decision
If Existing Student
If Not Existing Student
Default Outcome
Existing Student Flow
Subflow
New Student Flow
Subflow
End

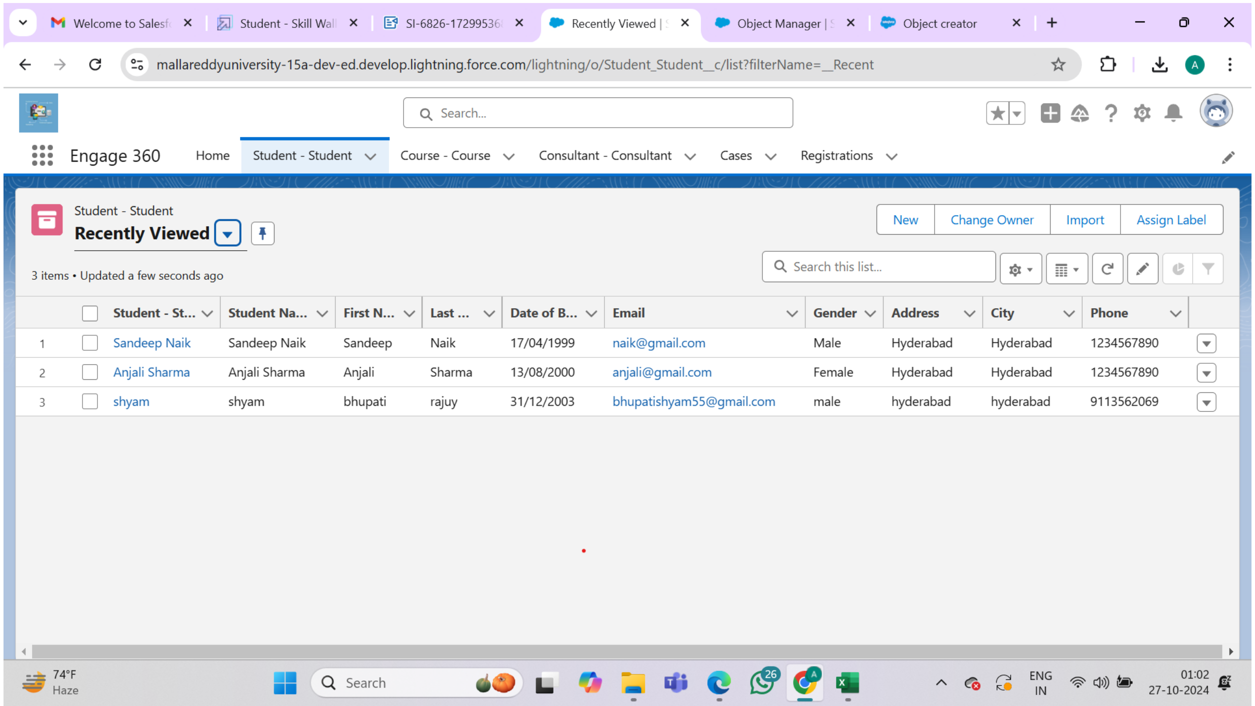
TASK-6

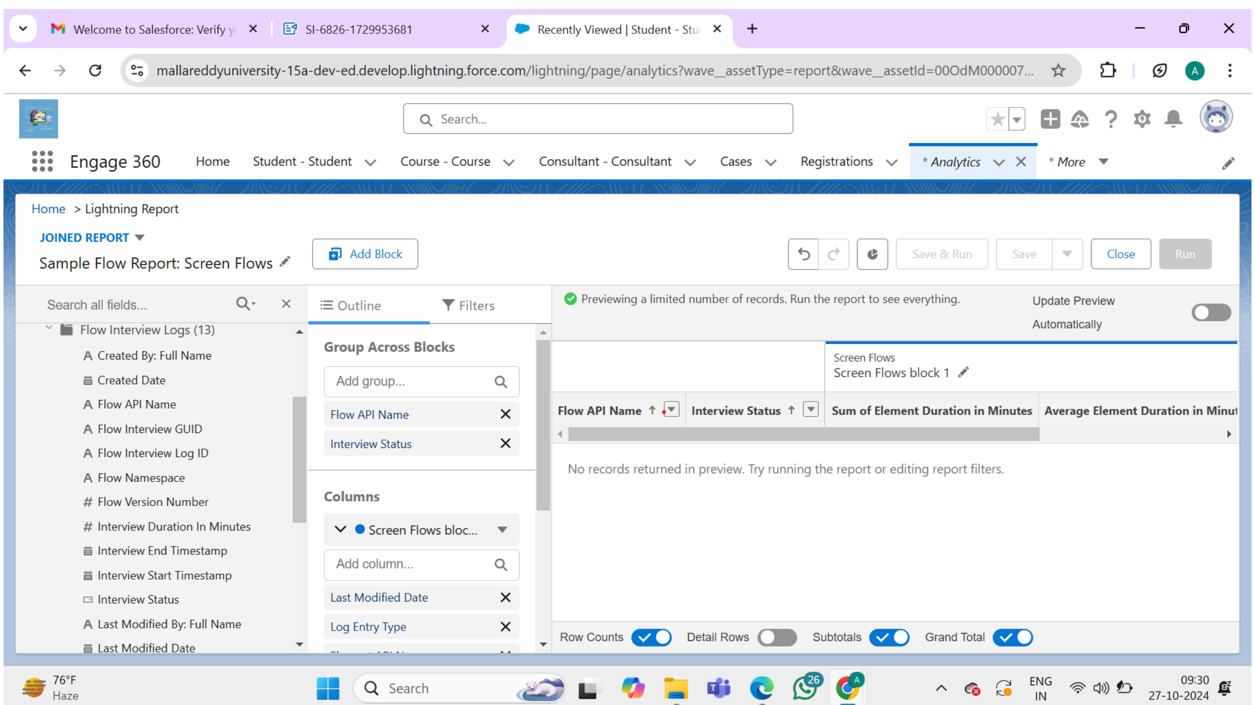
Dashboards





	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


Student - Student
Recently Viewed
New
Change Owner
Import
Assign Label
3 items • 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 | rajuy | 31/12/2003 | bhupatishyam55@gmail.com | male | hyderabad | hyderabad | 9113562069


Home > Lightning Report
JOINED REPORT
Sample Flow Report: Screen Flows
Add Block
Previewing a limited number of records. Run the report to see everything.
Group Across Blocks
Flow API Name
Interview Status
Columns
Last Modified Date
Log Entry Type
Screen Flows
Screen Flows block 1
Flow API Name
Interview Status
Sum of Element Duration in Minutes
No records returned in preview. Try running the report or editing report filters.
Row Counts
Detail Rows
Subtotals
Grand Total

CONCULSION

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