

A CRM Application to Manage the Services offered by an Institution

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Project Title

A CRM Application to Manage the Services Offered by an Institution

1. Project Overview

This project focuses on developing a CRM application for institutional service management using Salesforce. Designed to streamline admission, consulting, and immigration processes, it addresses challenges in managing student applications, consulting services, and case management effectively. The goal is to deliver a comprehensive solution leveraging Salesforce's robust features, including Lightning Apps, Approval Processes, Flows, and Email Automation. Through this project, we aim to enhance user experience, operational efficiency, and data accuracy while supporting the institution's long-term service goals.

2. Objectives

Business Goals:

- Enhance operational efficiency by automating admission and consulting workflows.
- Provide transparency and real-time updates to students and staff.
- Improve user experience with a seamless interface for application and service management.

Specific Outcomes:

- Automated admission application process with real-time notifications.
 - Streamlined consulting service requests and appointment scheduling.
 - Comprehensive immigration case management system.
 - Dashboards and reports for analyzing application metrics and trends.
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3. Salesforce Key Features and Concepts Utilized

- **Objects & Relationships:** Created custom objects for Admission, Consulting Requests, Immigration Cases, and Courses. Established relationships among these objects for efficient data management.
- **Case Management:** Configured the Case Object for handling immigration cases.

- **Lightning App:** Developed a custom Lightning App to facilitate user interactions.
 - **Screen Flows:** Created ScreenFlows for admission applications, appointment booking, and combining processes into a single interface.
 - **Approval Processes:** Implemented approval workflows for consulting requests with email notifications.
 - **Automation Tools:** Utilized Record-Triggered Flows and Action Elements for automated updates.
 - **Email Templates:** Designed templates for notifications to students and staff.
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4. Detailed Steps to Solution Design

Data Models:

- Created custom objects: Student, Course, Consulting Request, Immigration Case, etc.
- Defined relationships: Lookup and Master-Detail to connect relevant objects.

User Interface Designs:

- Built a Lightning App with components for Admission Applications, Consulting Requests, and Cases.
- Integrated ScreenFlows for intuitive navigation and input.

Business Logic:

- Configured Approval Processes for consulting request reviews.
- Automated processes using Flows for record creation, email alerts, and decision-making.

Screenshots:

- Creating custom objects

Create a custom object from a spreadsheet

Define object and fields

Choose the data source, map fields and their types, and import field data.

CSV File Details

Encoding Format: Unicode (UTF8) | Values Separated By: Comma | Field Label Source: Detect from row | Field Labels Row: 1 | Import 5 rows of Data?: Yes, import data | Record Name Field: Let Salesforce Create a Default F

Fields 5 of 5 to import | Hide mapped fields

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS	FIELD PREVIEW
✓ Course Name	Course Name	Text	✓	IELTS
✓ Description	Description	Text	✓	Let's Learn IELTS
✓ Start Date	Start Date	Phone	✓	03-01-2024
✓ End Date	End Date	Date	✓	05/31/2024
✓ Instructor	Instructor	Text	✓	Sandeep

Back | Next

- Creating relationship among objects

Setup | Home | Object Manager

Search Setup

Setup > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Hierarchy Columns

Inactive picklist values: 0

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Case Type Picklist Values

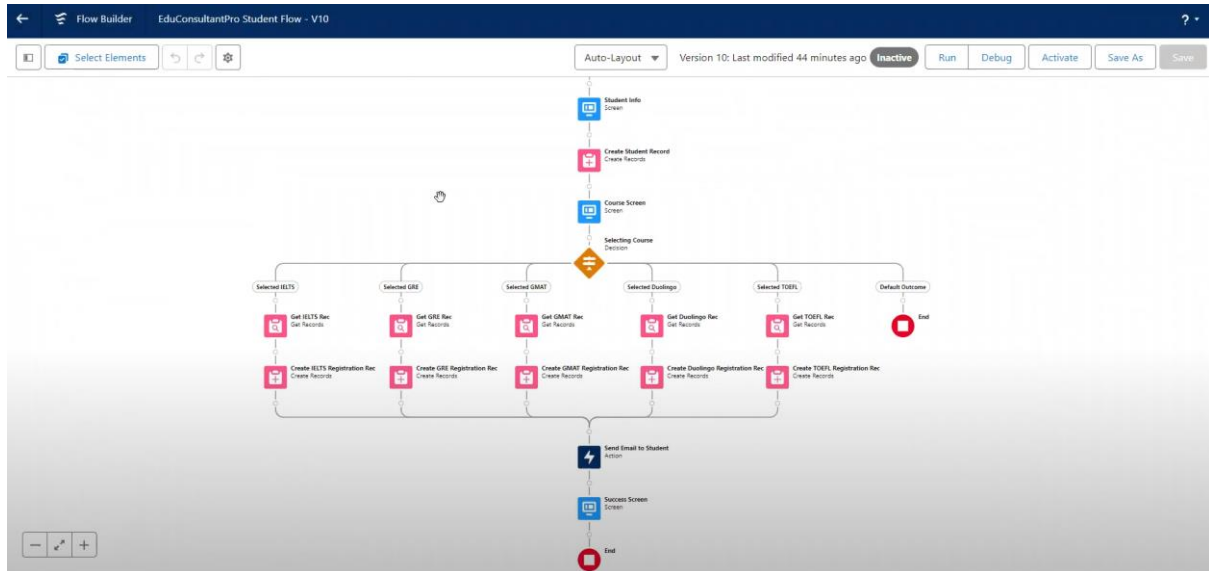
New | Reorder | Replace | Printable View | Chart Colors

Action	Values	API Name	Default	Chart Colors
Edit Del Deactivate	Mechanical	Mechanical	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Electrical	Electrical	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Electronic	Electronic	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Structural	Structural	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Immigration	Immigration	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Visa Application	Visa Application	<input type="checkbox"/>	Assigned dynamically


Inactive Values

No inactive values defined.

- Creating a ScreenFlow for student admission application project



- Creating a new user



SETUP
Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

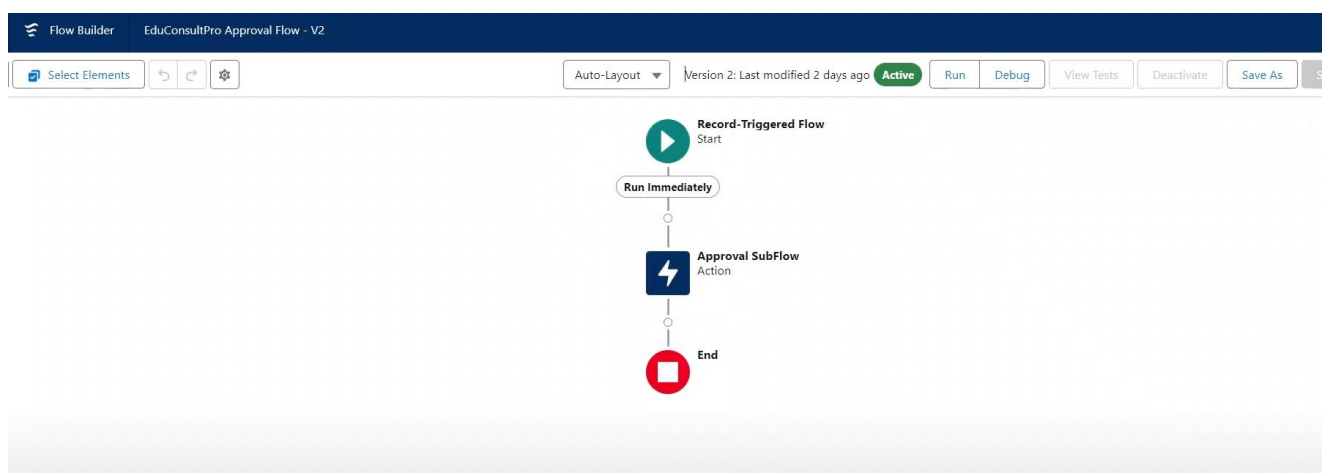
View: All Users Edit | [Create New View](#)

<input type="checkbox"/> Action	Full Name ↑	Alias
<input type="checkbox"/> Edit	Chatter Expert	Chatter
<input type="checkbox"/> Edit	Consultant	cons
<input type="checkbox"/> Edit	Consultant Adam	cons

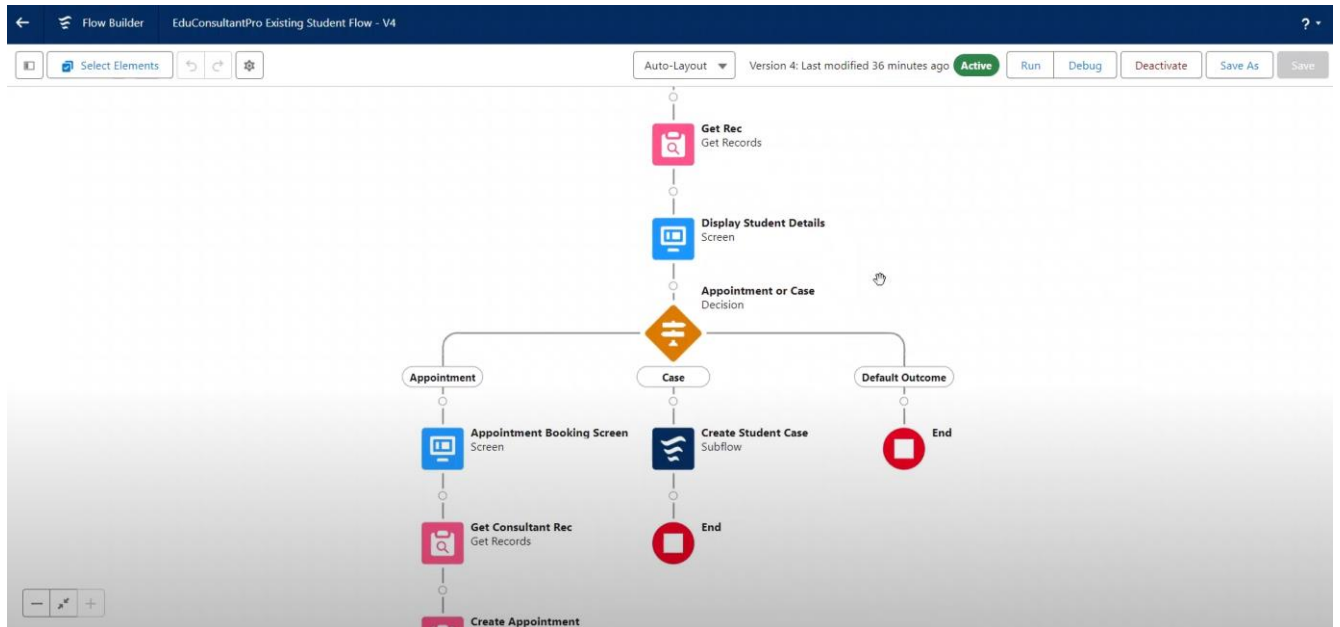
- **Creating approval process**

Email Templates			
Recent			
3 items			
EMAIL TEMPLATES	Email Template Name	Description	Folder
Recent	Rejection Template		No Desires
Created by Me	Approval Template		No Desires
Private Email Templates	Submission Template		No Desires
Public Email Templates			

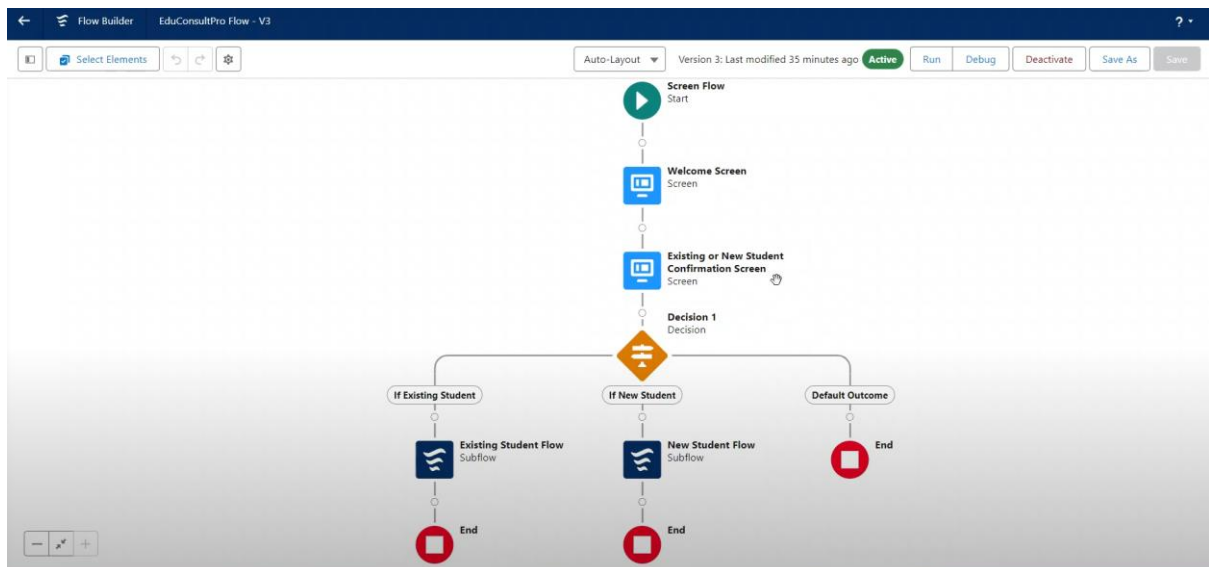
- **Creating a record triggered flow**



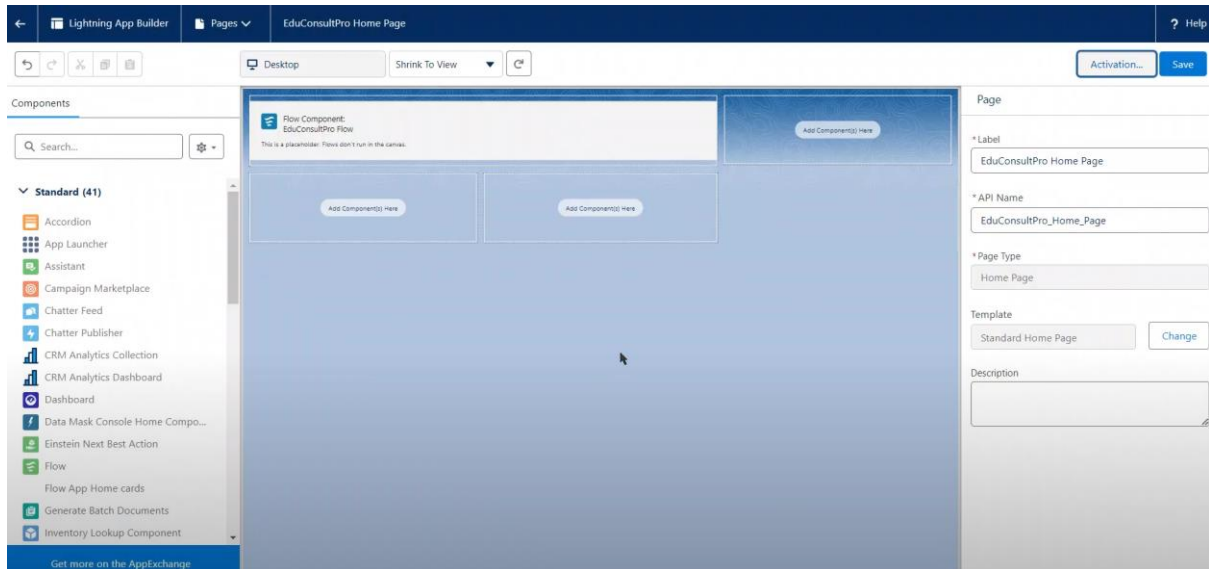
- Creating a screenflow for existing student to book an appointment



- Creating a screenflow to combine all flows at one place



- **Creating a lightning app page**



5. Testing and Validation

Unit Testing:

- Validated Apex Classes and Triggers to ensure seamless automation.

User Interface Testing:

- Conducted thorough testing of Lightning App components, Flows, and Approval Processes.
- Verified email notifications for accuracy and consistency.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

1. Students submitting admission applications through a portal and receiving automated notifications.
2. Consultants managing and scheduling appointments directly within Salesforce.
3. Immigration agents processing and tracking cases using custom Case Object features.
4. Reporting and analytics on application metrics, acceptance rates, and consulting trends.

7. Conclusion

Summary of Achievements:

This project successfully delivered a robust CRM application for managing institutional services. Key accomplishments include automation of admissions and consulting workflows, comprehensive immigration case management, and improved user experience through a customized Lightning App. The solution aligns with the institution's goals, providing efficient processes, real-time updates, and actionable insights through advanced reporting.