A CRM Application to Manage the Services offered by an Institution

By

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https://www.salesforce.com/trailblazer/psfunppg43j4cqnm24

Project Abstract

The project involved developing a Salesforce CRM application for EduConsultPro Institute, aimed at improving the management of student admissions, consulting requests, and immigration cases. The system enabled prospective students to submit admission applications online, with data automatically captured in Salesforce and automated email notifications sent to applicants. The project also included managing consulting services, where students could request consultations, and consultants were notified to schedule and manage appointments within the CRM. Additionally, an immigration case management system was implemented to efficiently log, process, and track cases, with automated notifications for agents and robust document management features. This solution significantly streamlined operations and enhanced the overall experience for both students and staff at EduConsultPro.

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INTRODUCTION

EduConsultPro Institute, a prominent educational institution, offers a diverse array of courses and programs to students from various backgrounds. With the institute's increasing popularity, managing the growing number of student admissions, consulting requests, and immigration cases became a significant challenge. To overcome these operational inefficiencies, EduConsultPro embarked on a project to implement a robust Customer Relationship Management (CRM) system using Salesforce.

The project's primary objective was to streamline and automate the institute's core administrative processes. For admission application management, the goal was to enable prospective students to submit their applications through the institute's online portal. This information would be captured directly into the Salesforce CRM, ensuring efficient data handling. Additionally, automated email notifications were set up to acknowledge successful submissions, and tools were provided to admissions staff for generating insightful reports and dashboards, allowing for a deeper analysis of application metrics, acceptance rates, and enrollment trends.

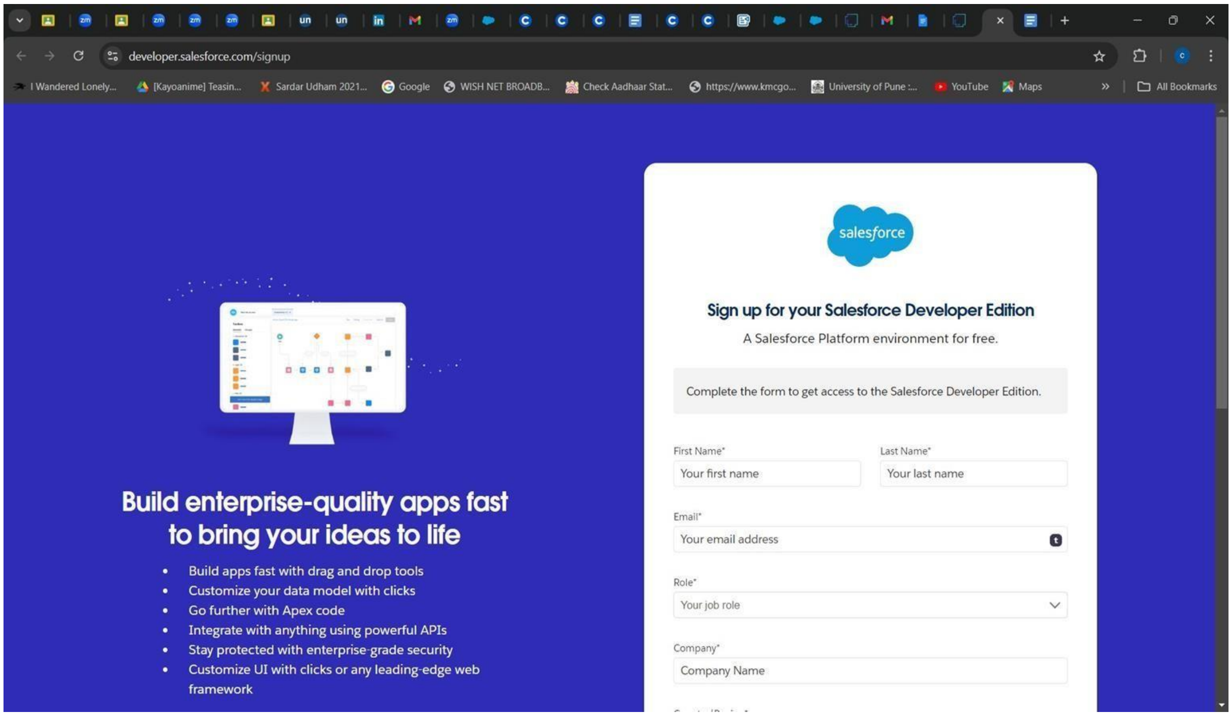
In terms of consulting services management, the project focused on creating a seamless process where students could request consulting services via the institute's website. These requests would be recorded in Salesforce, triggering automated notifications to consultants who could then schedule and manage appointments within the CRM. This ensured that the scheduling process was organized, and the status of each appointment, whether scheduled, completed, or canceled, was tracked effectively.

Another critical component was the implementation of an immigration case management system. Students could initiate immigration cases through various channels such as phone, email, or web. These cases were then logged into Salesforce, with immigration agents receiving immediate notifications to take action. The system also included tools for tracking case statuses and managing related documents, ensuring that every case was processed efficiently and transparently.

This comprehensive Salesforce solution not only addressed the immediate operational needs of EduConsultPro but also set the foundation for future scalability, enabling the institution to provide an enhanced and streamlined experience for both students and staff.

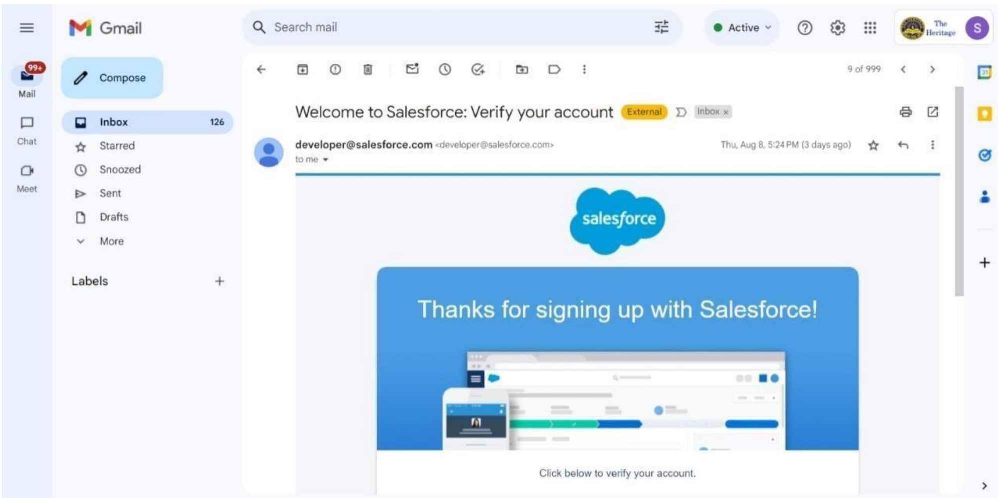
TASK 1: Creating Developer Account

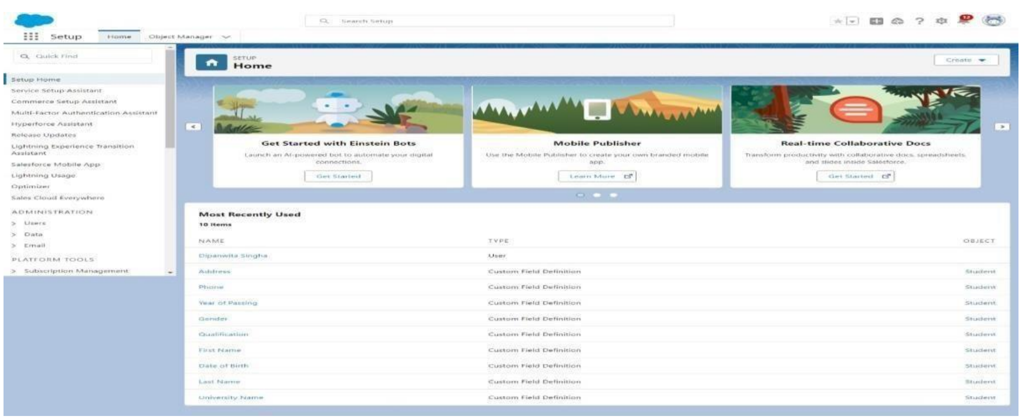
1. Go to https://developer.salesforce.com/signup
2. Fill up form with personal information



TASK 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.
2. Give a password and answer a security question and click on change password.
3. Then you will redirect to your salesforce setup page.



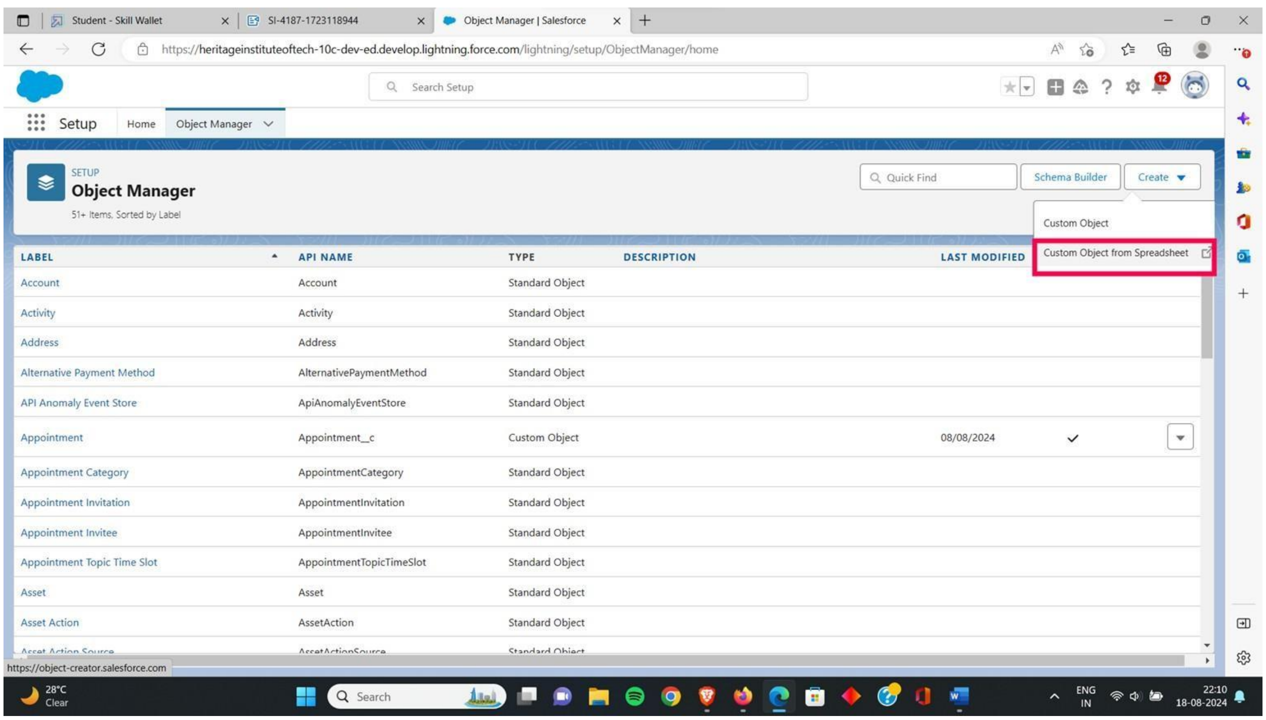


TASK 3: Create Objects from Spreadsheet

This task involves directly creating objects in Salesforce by importing data from spreadsheets and establishing relationships between them.

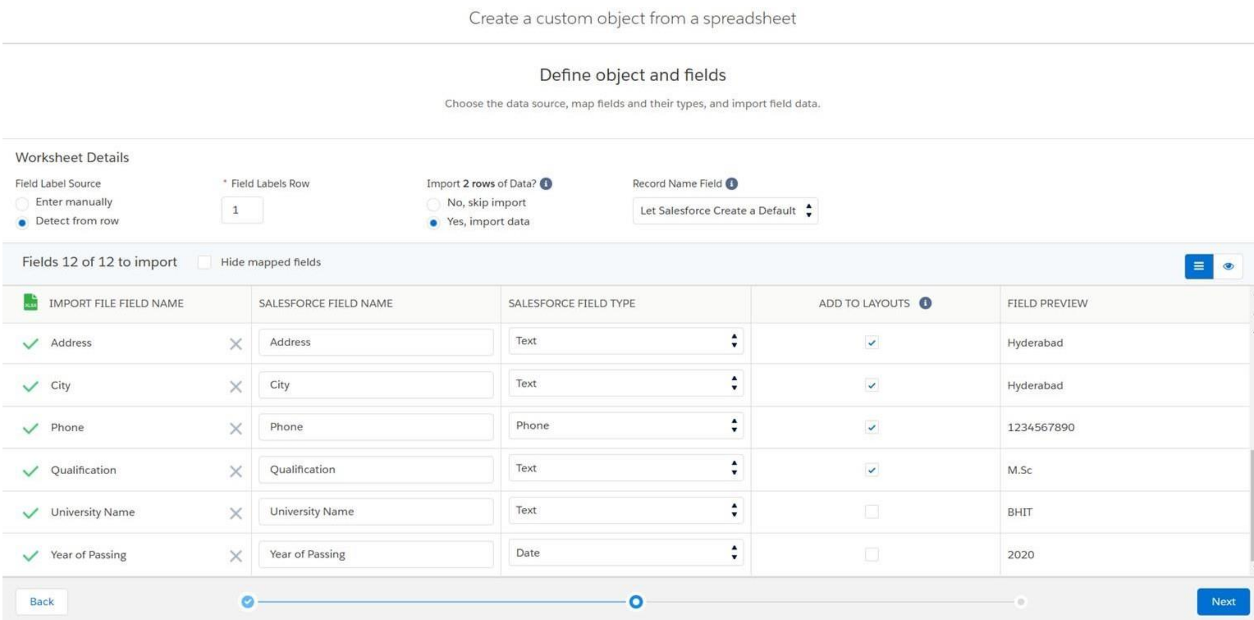
Subtask 1: Create Course Object

1. Navigate to **Object Manager**.
2. Click on **Create Object from Spreadsheet**.

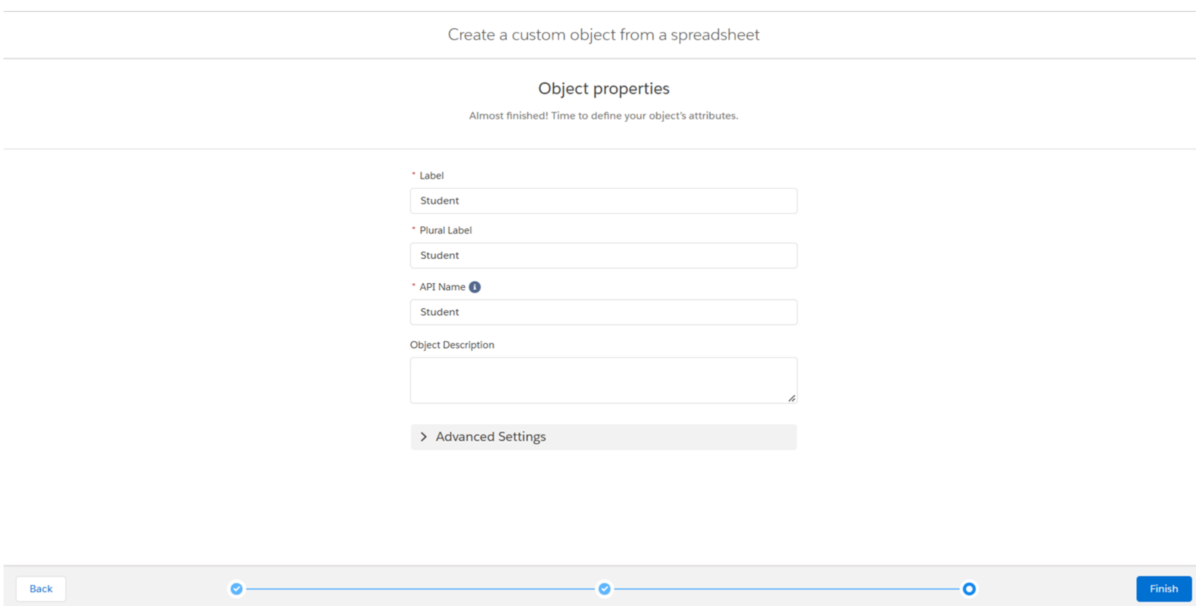


3. Upload the spreadsheet to Salesforce.

4. Map the fields from the spreadsheet to the object fields.



5. Define the Object properties



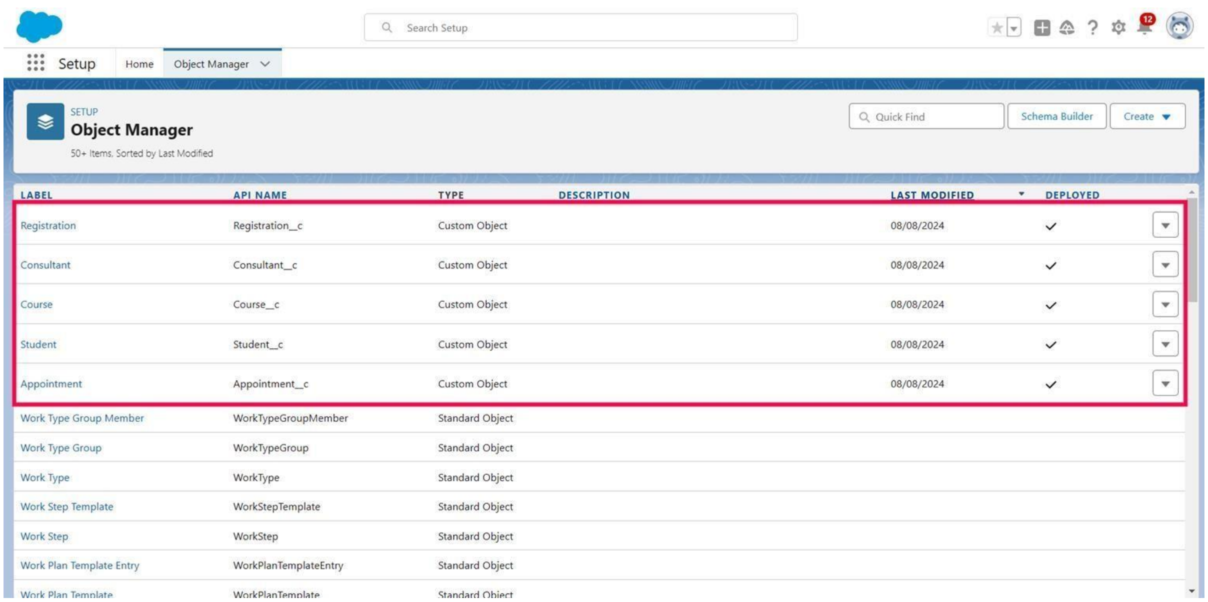
6. Following the same steps create the following objects:

   a. **Consultant**

   b. **Student**

   c. **Appointment**

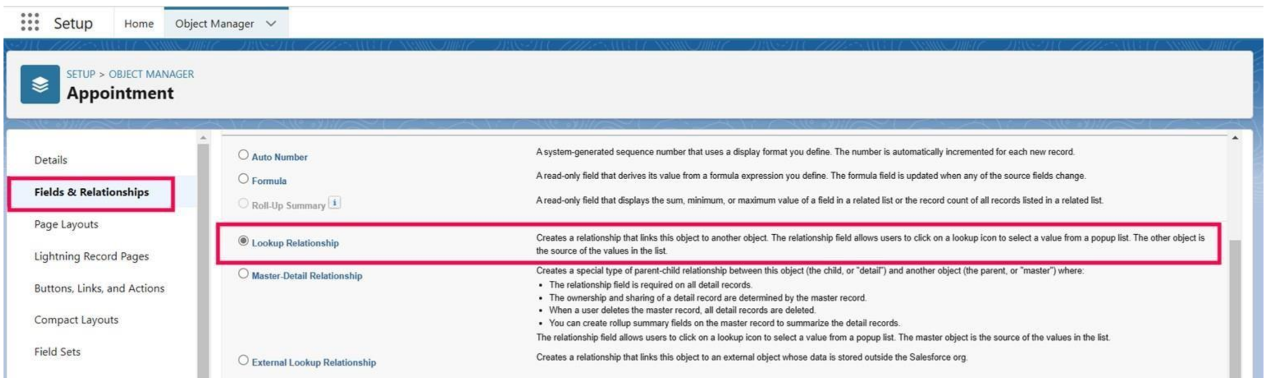
   d. **Registration**



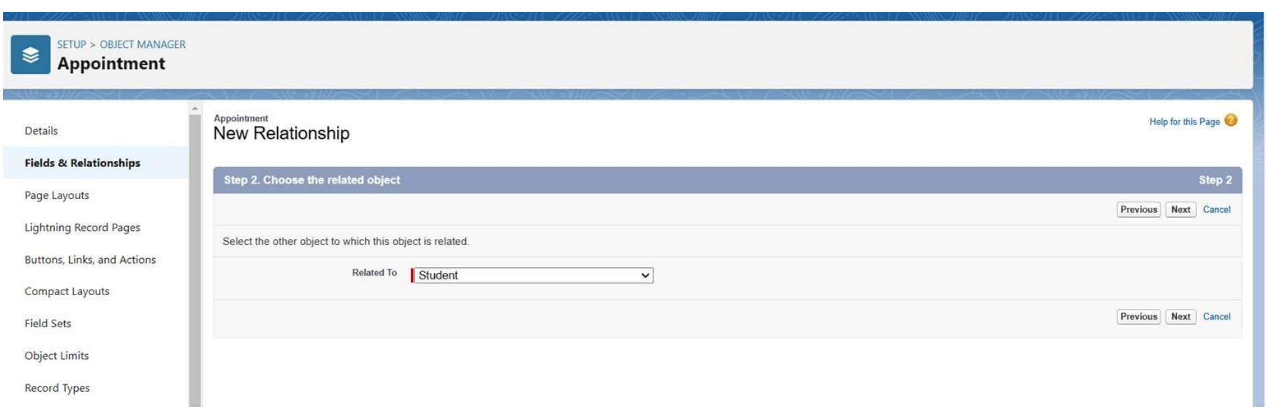
Subtask 2: Create Relationships Among the Objects

1. Create a **Lookup relationship** between **Appointment** and **Student Object**

    a. Go to the Appointment object and create a new custom field from **Fields & Relationships** and choose the field type **Lookup relationship**



    b. Choose the related object for the relationship as **Student**

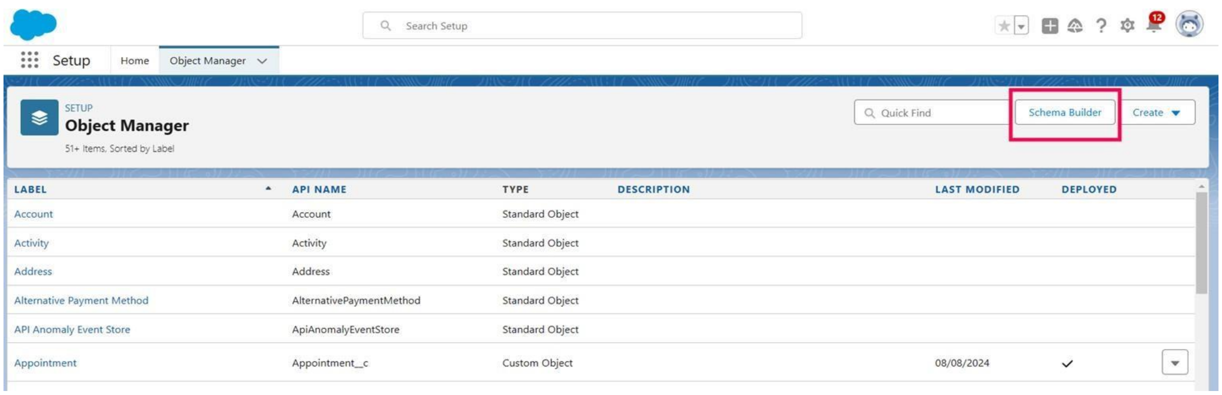


2. In the same way create **Lookup relationship** between the following:

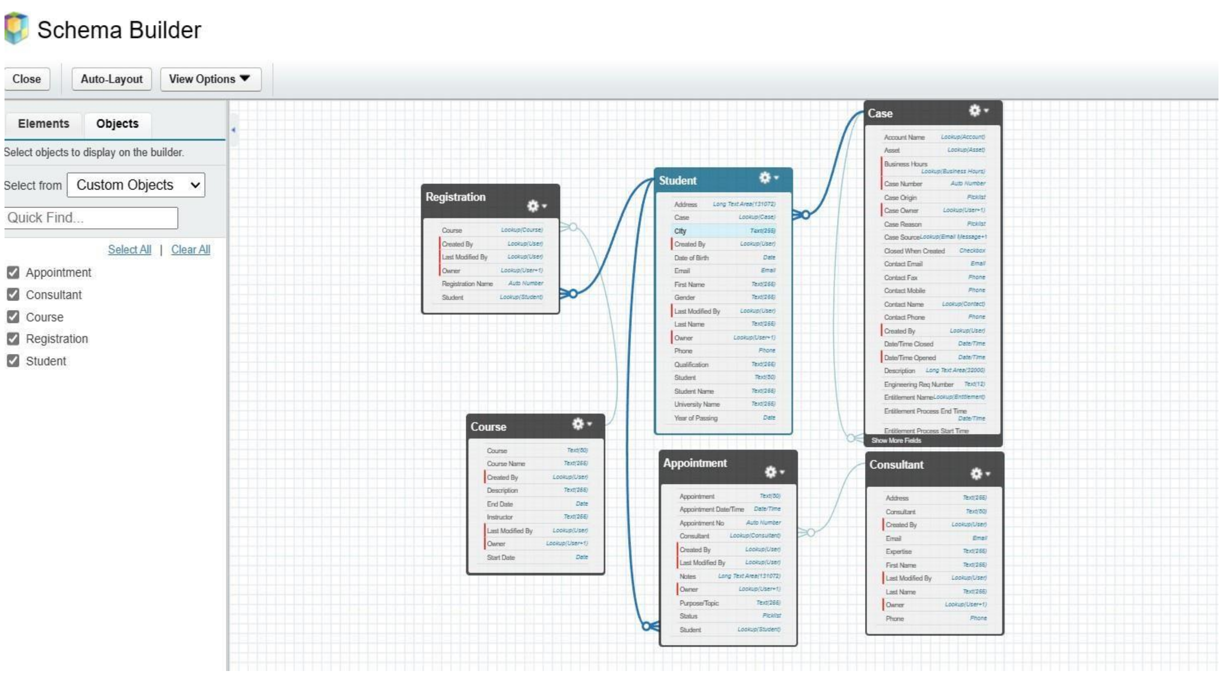
    - **Appointment** and **Student Object**
    - **Student** and **Case Object**

The Lookup relationship **Student** and **Case Object** is to manage student queries related to immigration or visa applications.

3. Go to the **Schema Builder** to see the relationship between the objects.

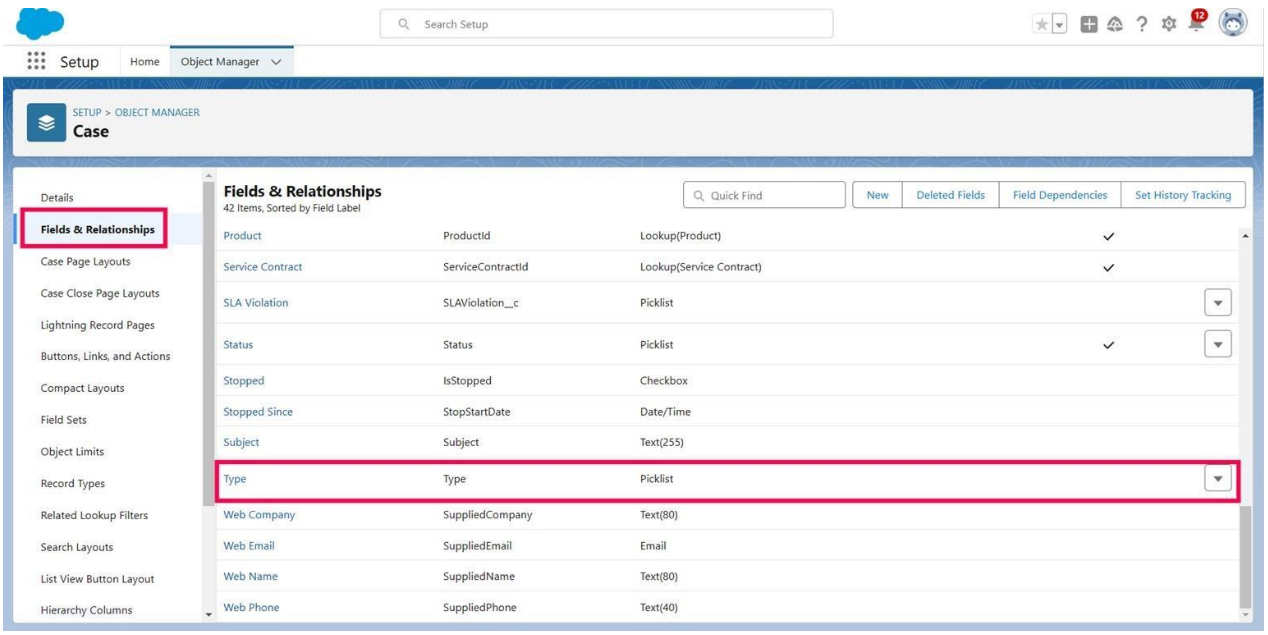


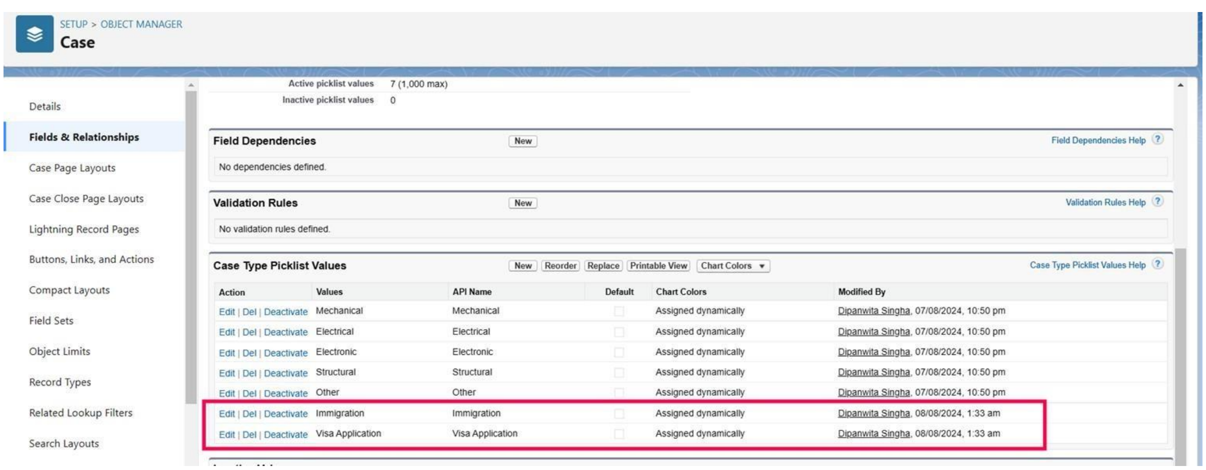
4. The data model will look like this:



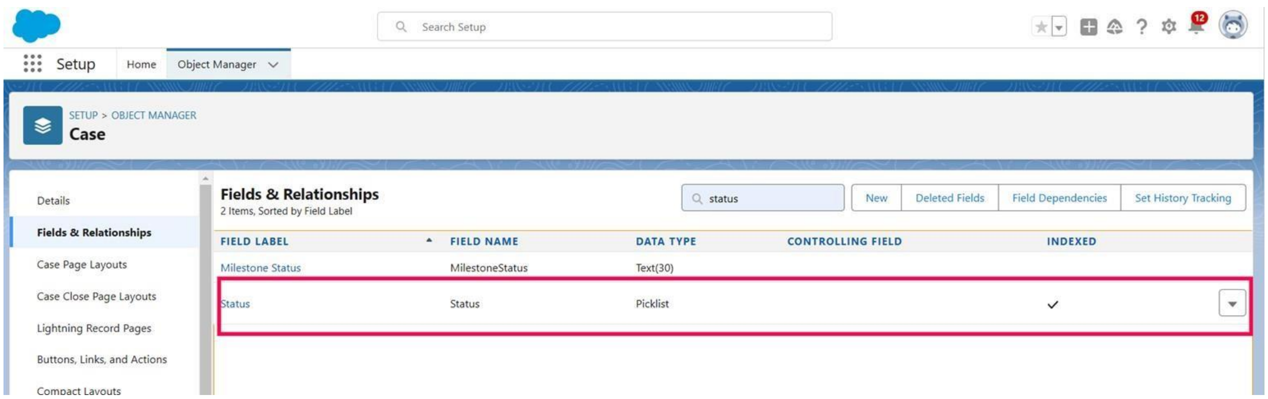
Subtask 3: Configure the Case Object

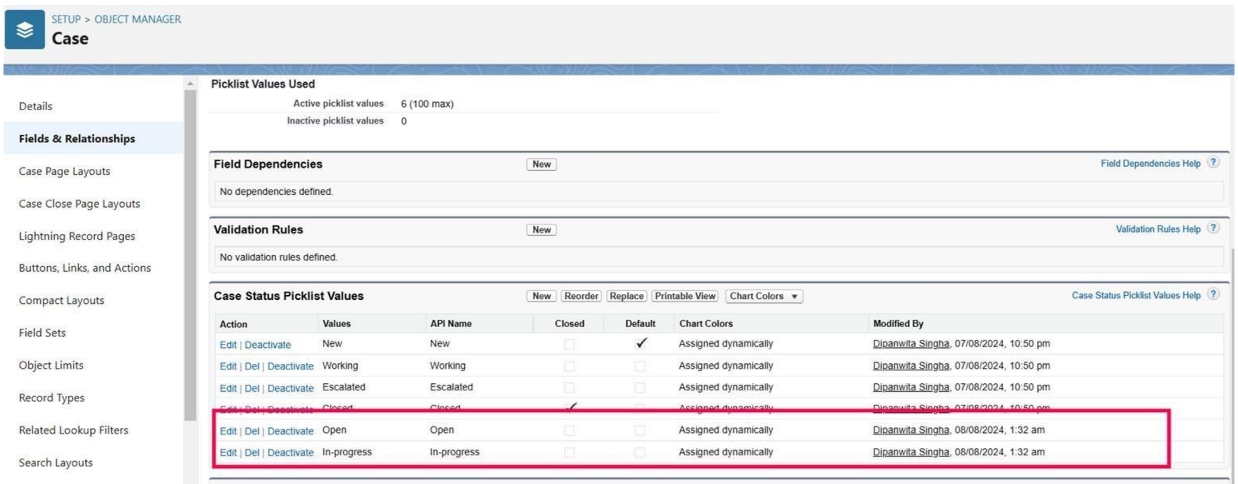
1. Navigate to **Object Manager**, then select the **Case** object.
2. Edit the **Type** field and add the following values:
   - **Immigration**
   - **Visa Application**





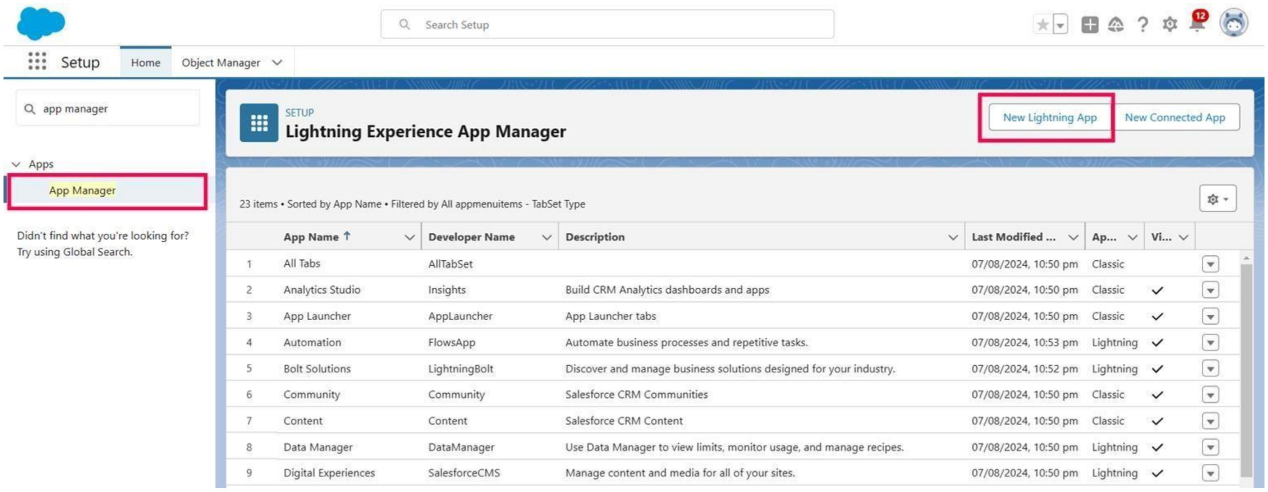
3. Edit the **Status** field and add the following values:
    - **Open**
    - **In-progress**



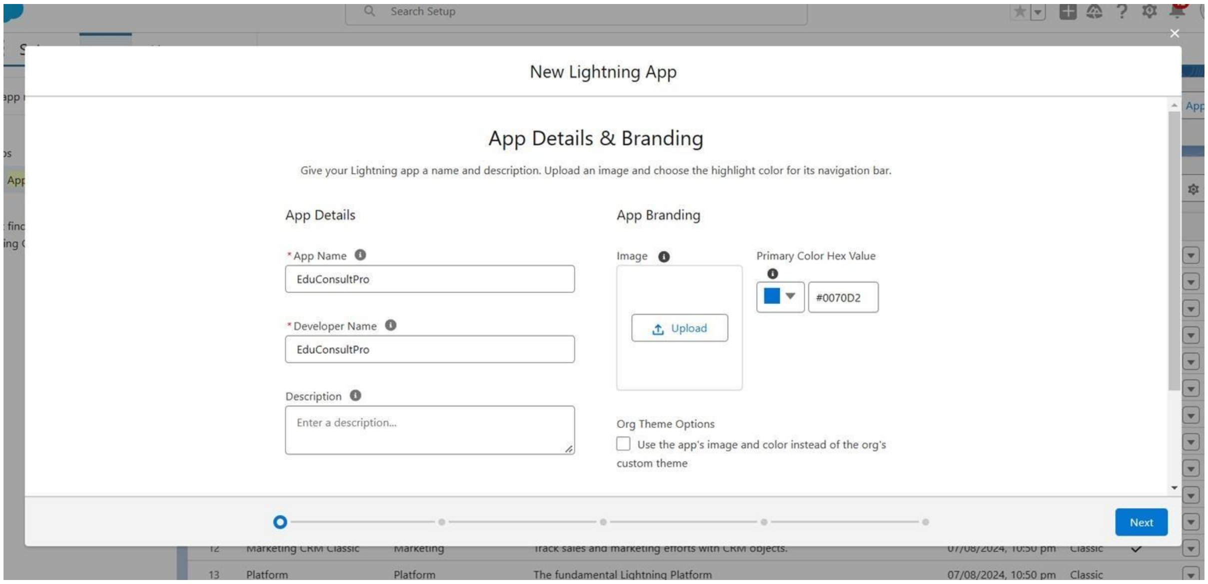


Subtask 4: Create a Lightning App

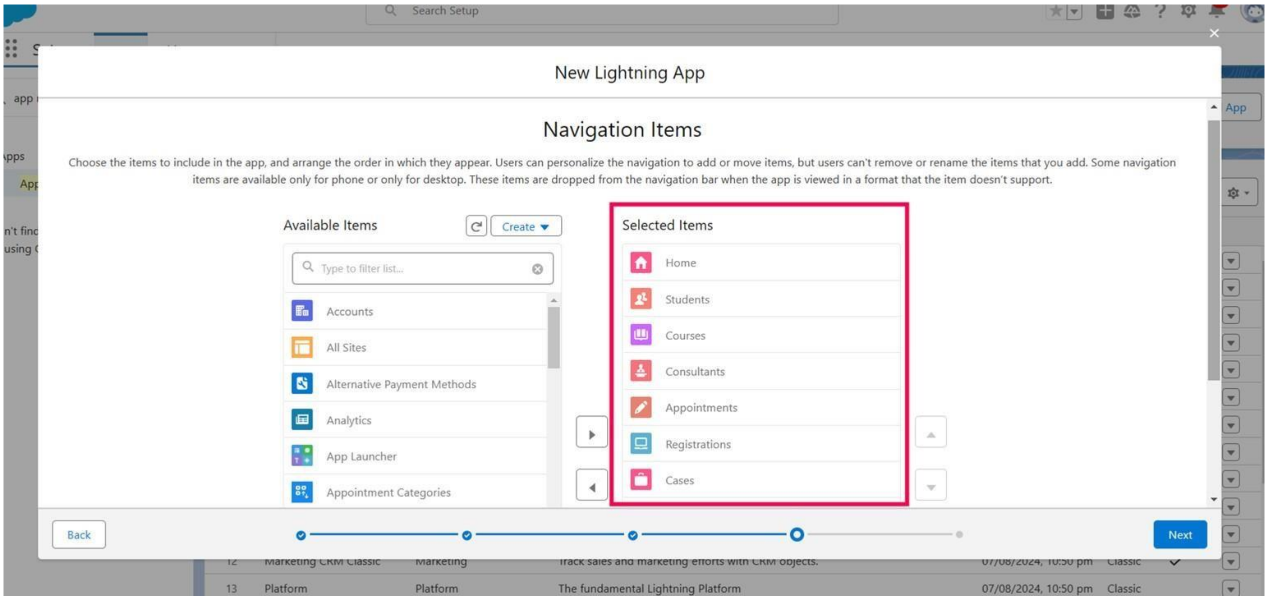
1. In **Setup**, search for **App Manager** in the Quick Find bar.
2. Click on **New Lightning App**.



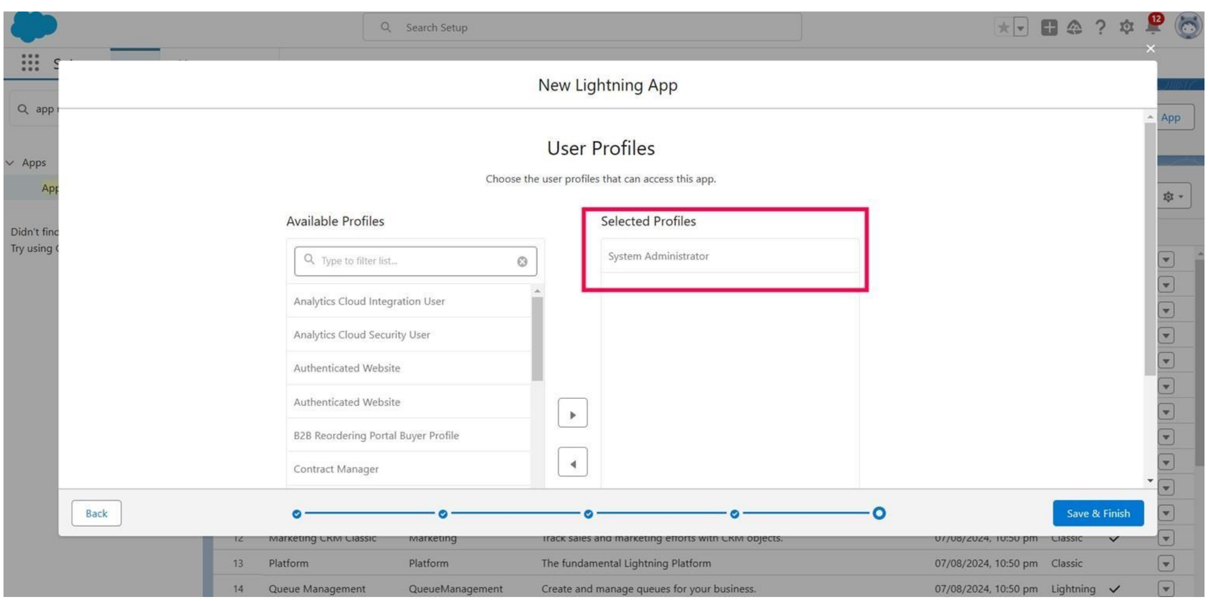
3. Name the app **EduConsultPro.**



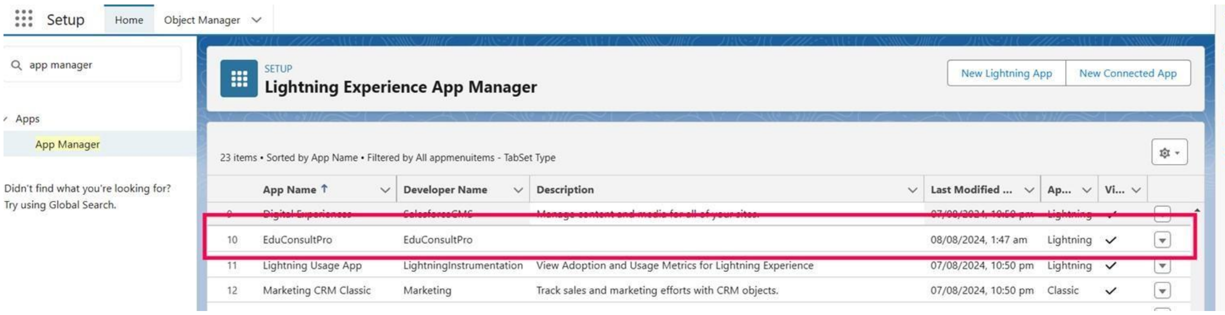
4. Add the following items from the Available Items list to the Selected Items list:
   - **Home**, **Students**, **Courses**, **Consultants**, **Appointments**, **Registrations**, **Cases**



5. Add the **System Administrator** profile from Available Profiles to Selected Profiles and click **Save & Finish**.



6. **EduConsultPro** app is created.



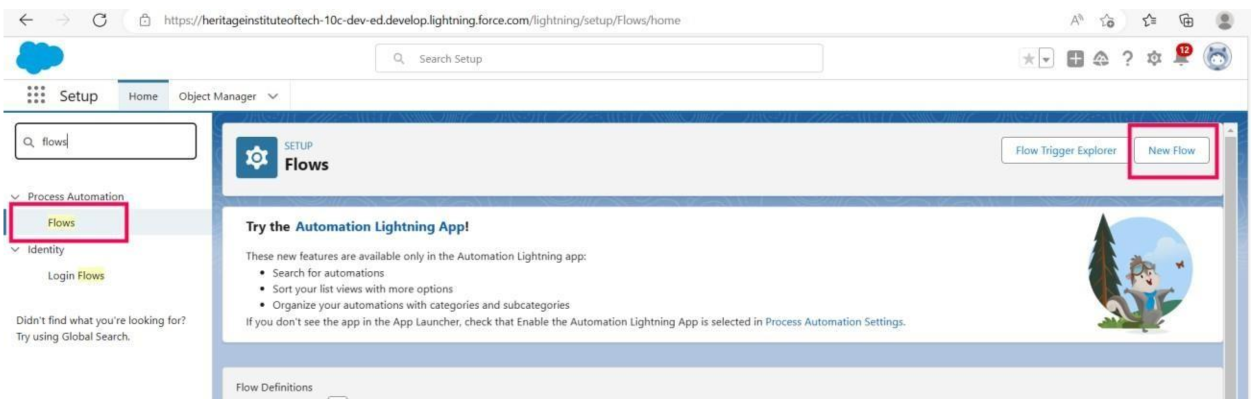
TASK 4: Create A ScreenFlow For Student Admission Application Process

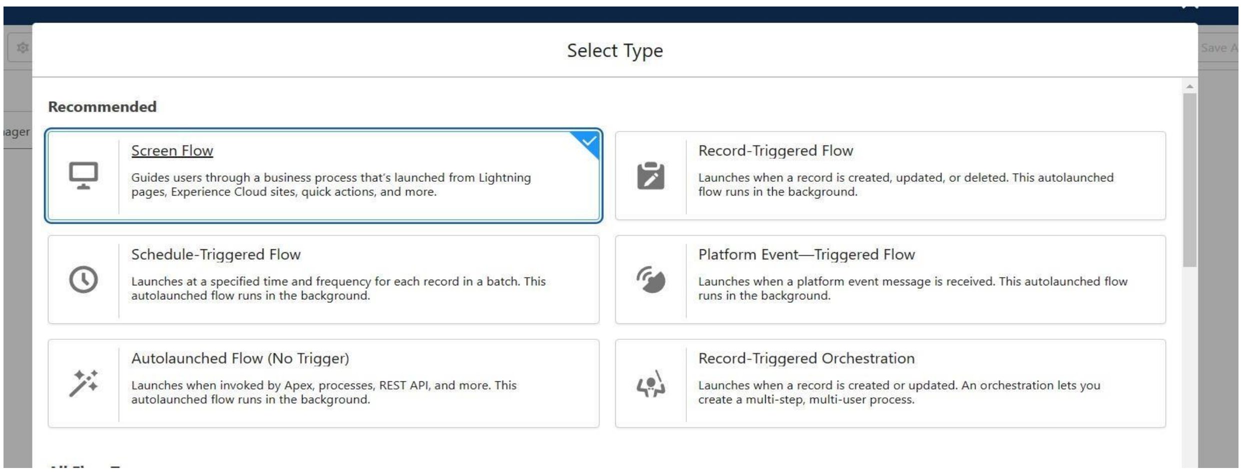
Design a ScreenFlow to automate the student admission process, including data capture, record creation, course selection, and email notifications.

Subtask 1: Add Screen Element

Set up a screen to capture student information.

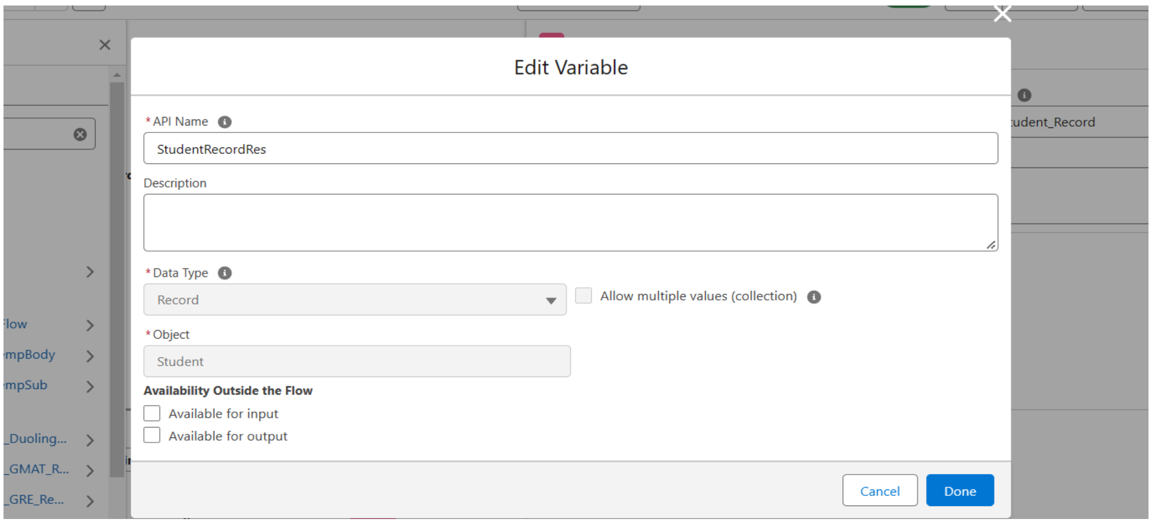
1. Navigate to **Setup**, enter **Flow** in the Quick Find box, and select **New Flow**. Choose **ScreenFlow**.

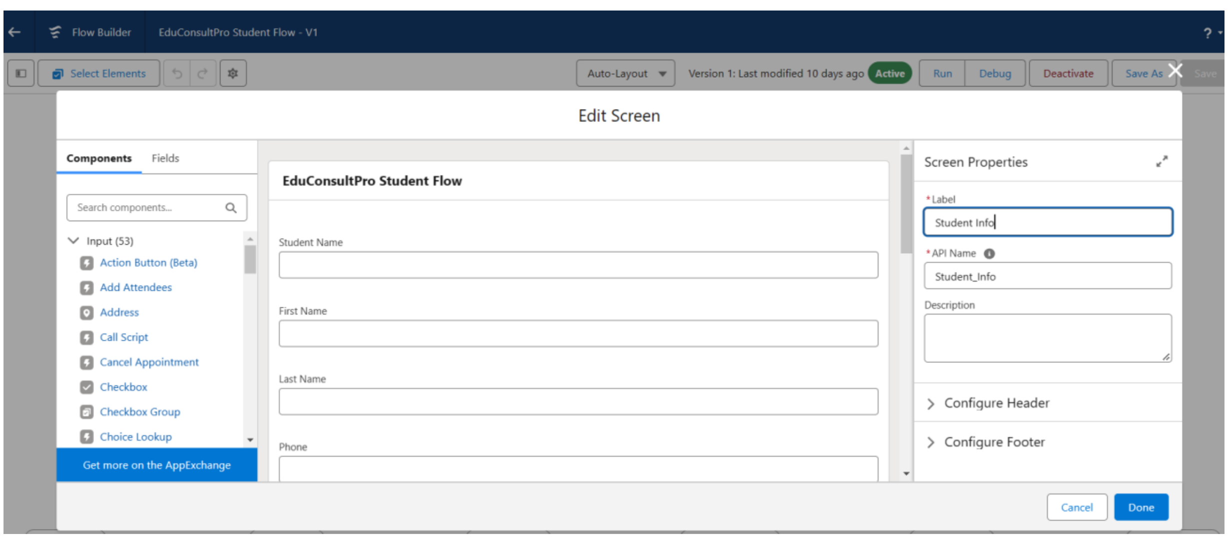




2. Add a **Screen** element.

3. In the **Screen Properties** pane:
   - **Label:** Enter “Student Info”.
   - **Fields:** Create a new **Resource** (StudentRecordRes) to display all fields from the **Student** object.
   - **Action:** Drag and drop the necessary fields to collect student information on the screen like the Student Name, First Name, Last Name, Phone, Email, DoB, Address, City, Qualification.

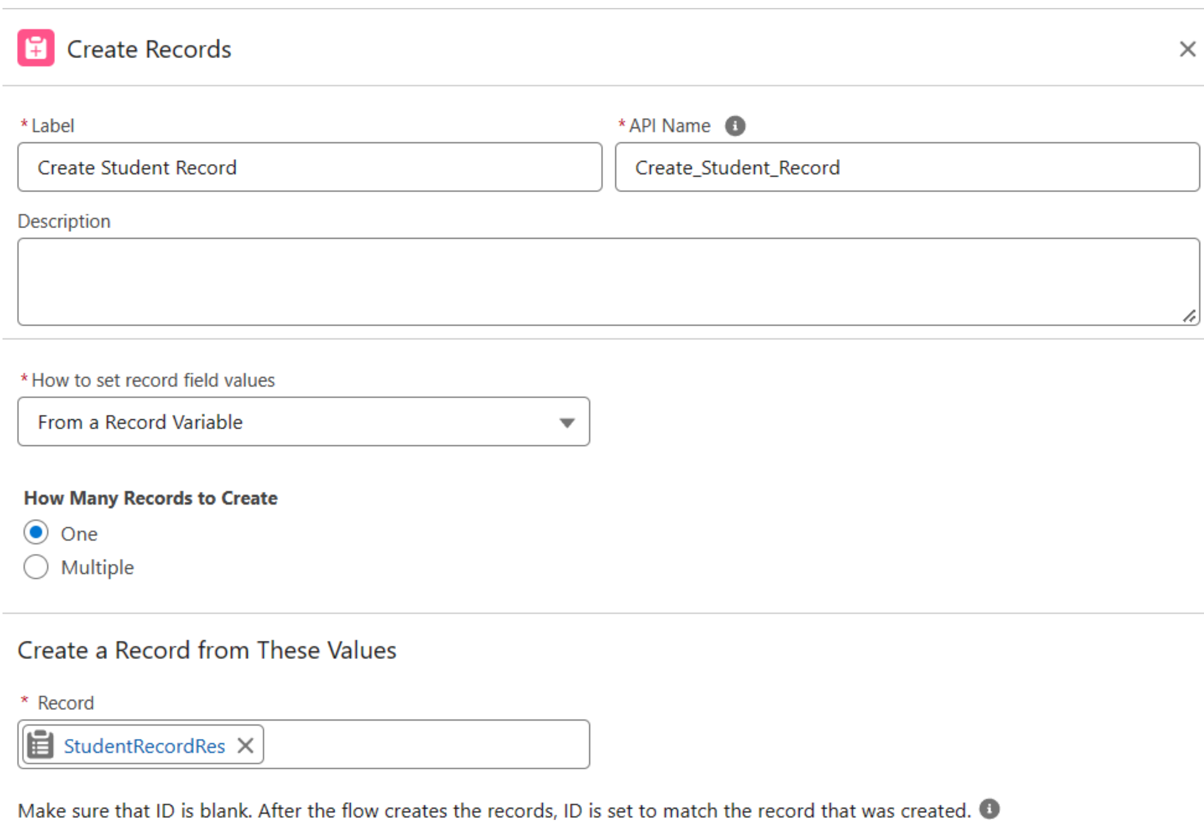




Subtask 2: Create Student Record Using Create Element

Set up a process to create a student record from the captured information.

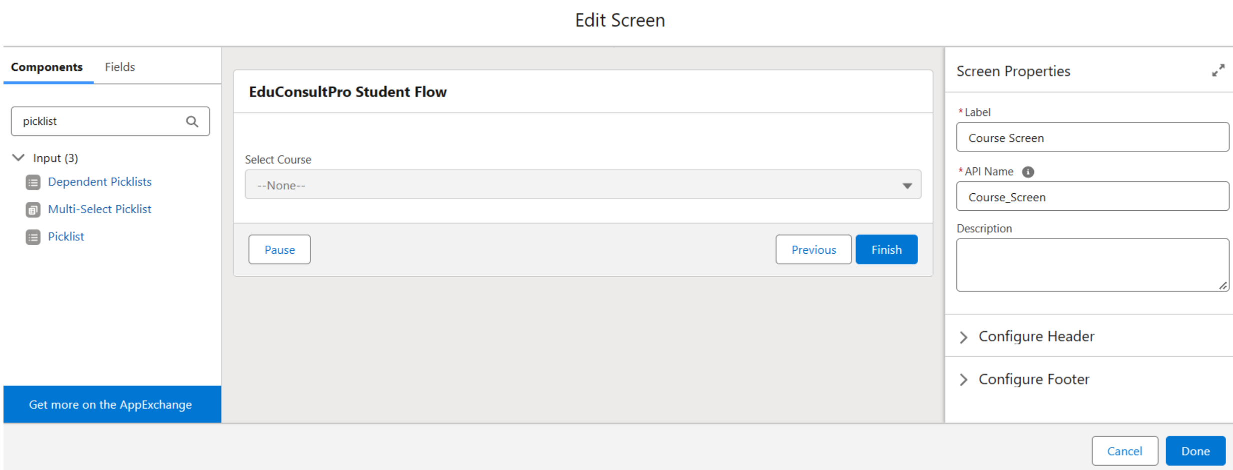
1. Add a **Create** element after the Student Info screen element.
2. **Label:** "Create Student Record".
3. Select "**One**" under **How many records to Create**.
4. Choose "**Use all values from a record**" under **How to Set the record fields**.
5. Select the **StudentRecordRes** variable from the Student Info screen element under **Create a record from these values**.



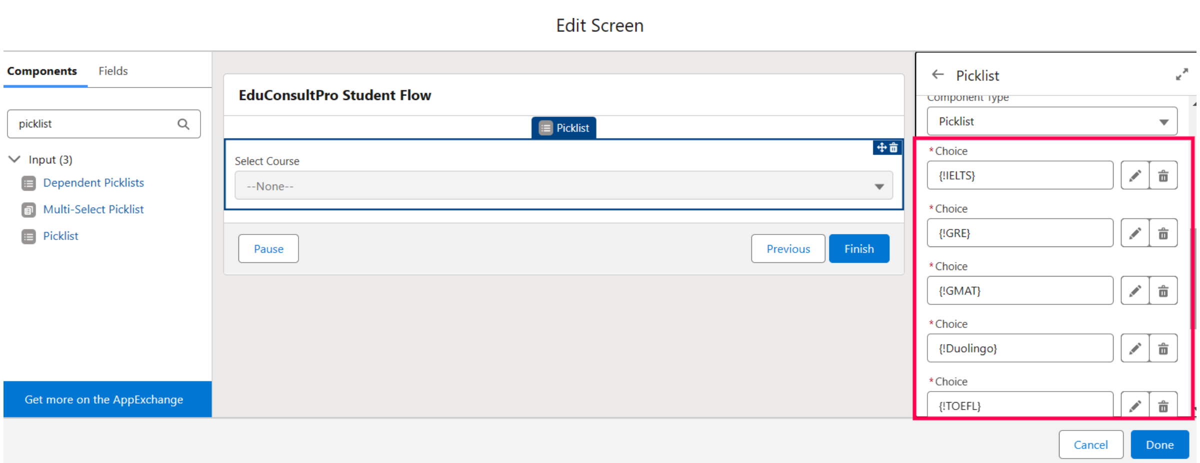
Subtask 3: Add Course Selection Screen

Provide a screen for students to select a course.

1. Add a **Screen** element after the Create Student Record element.
2. **Label:** “Course Screen”.



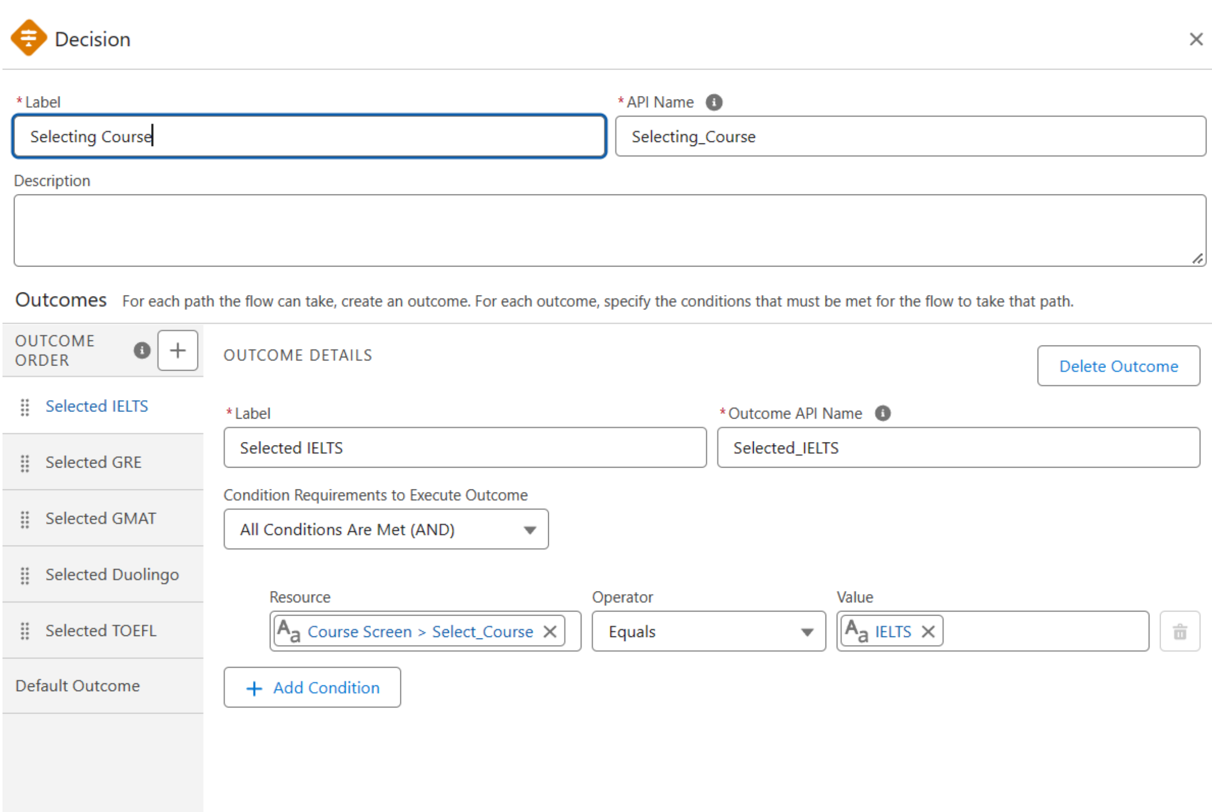
3. Add a **Picklist** component:
   - **Label:** “Select Course”.
   - **Choices:** Enter “IELTS”, “GRE”, “GMAT”, “Duolingo”, and “TOEFL”.



Subtask 4: Add Decision Element

Define logic to determine which course has been selected.

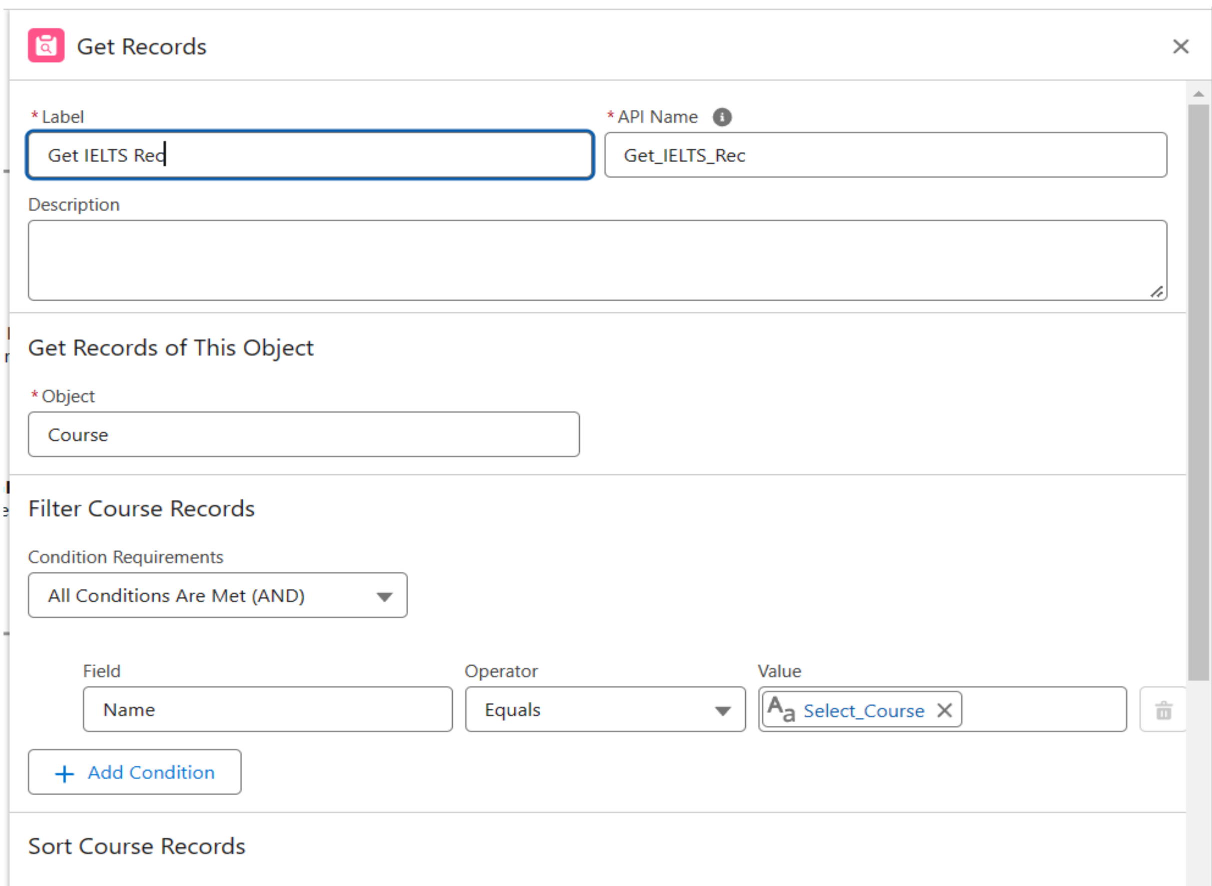
1. Add a **Decision** element after the Course Screen.
2. **Label:** “Selecting Course”.
3. Define outcomes for each course:
    - **Outcome Label:** “Selected IELTS”.
    - **Condition:**
        - **Resource:** Select_Course (Screen Component from Select Course Screen Element)
        - **Operator:** Equals
        - **Value:** IELTS (Choice Variable from Select Course Screen Element)
    - Repeat for GRE, GMAT, Duolingo, TOEFL.



Subtask 5: Add GET Record Element

Retrieve course details based on the selected course.

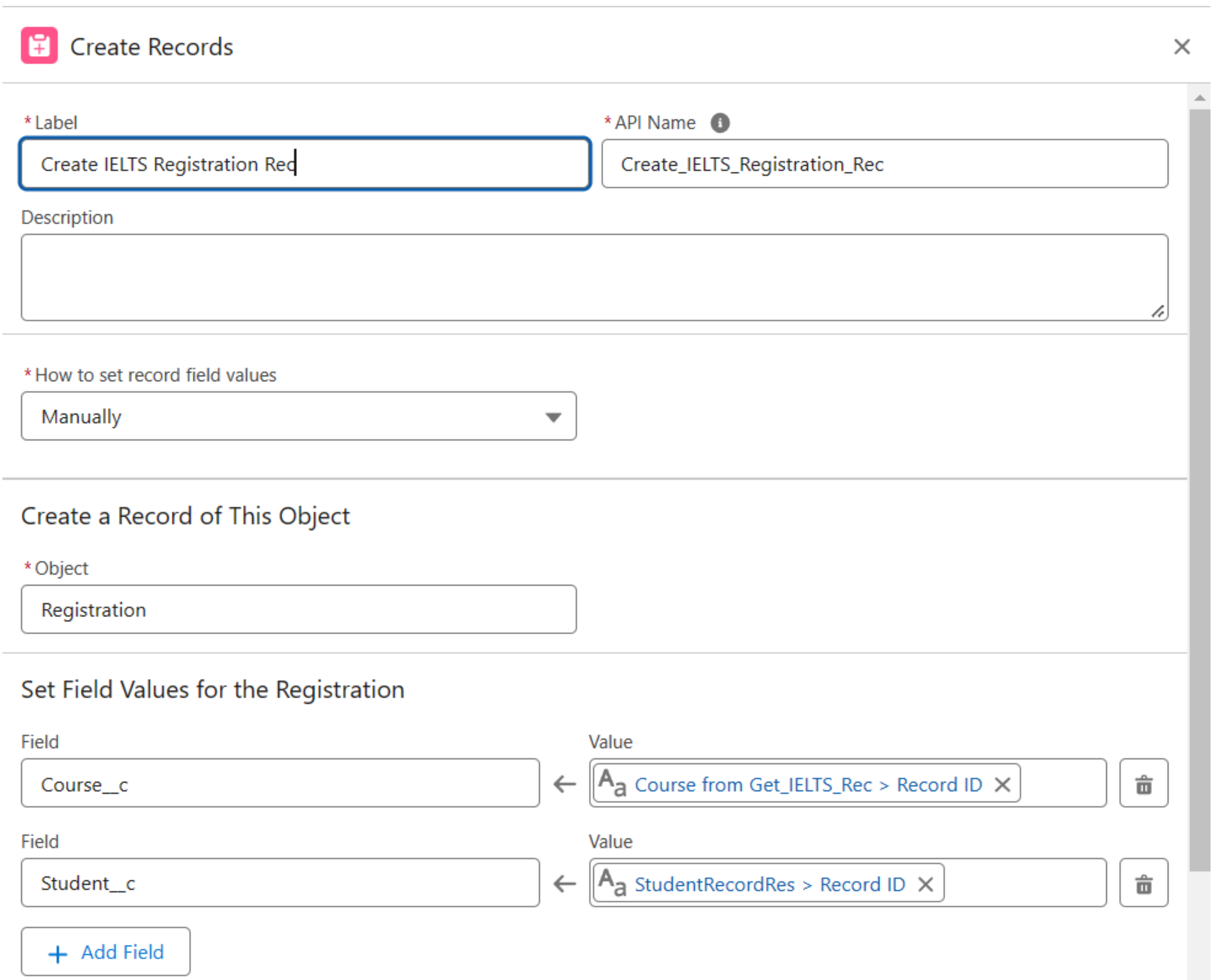
1. Add a **GET Record** element after each Decision path (IELTS, GRE, GMAT, etc.).
2. **Label:** “Get [Course Name] Rec”.
3. **Object:** Course
4. **Condition Requirement:** All Conditions are Met (AND)
5. **Field:** Course Name
6. **Operator:** Equals
7. **Value:** {!Select_Course}



Subtask 6: Create Registration Record Using Create Records Element

Create a registration record for the selected course.

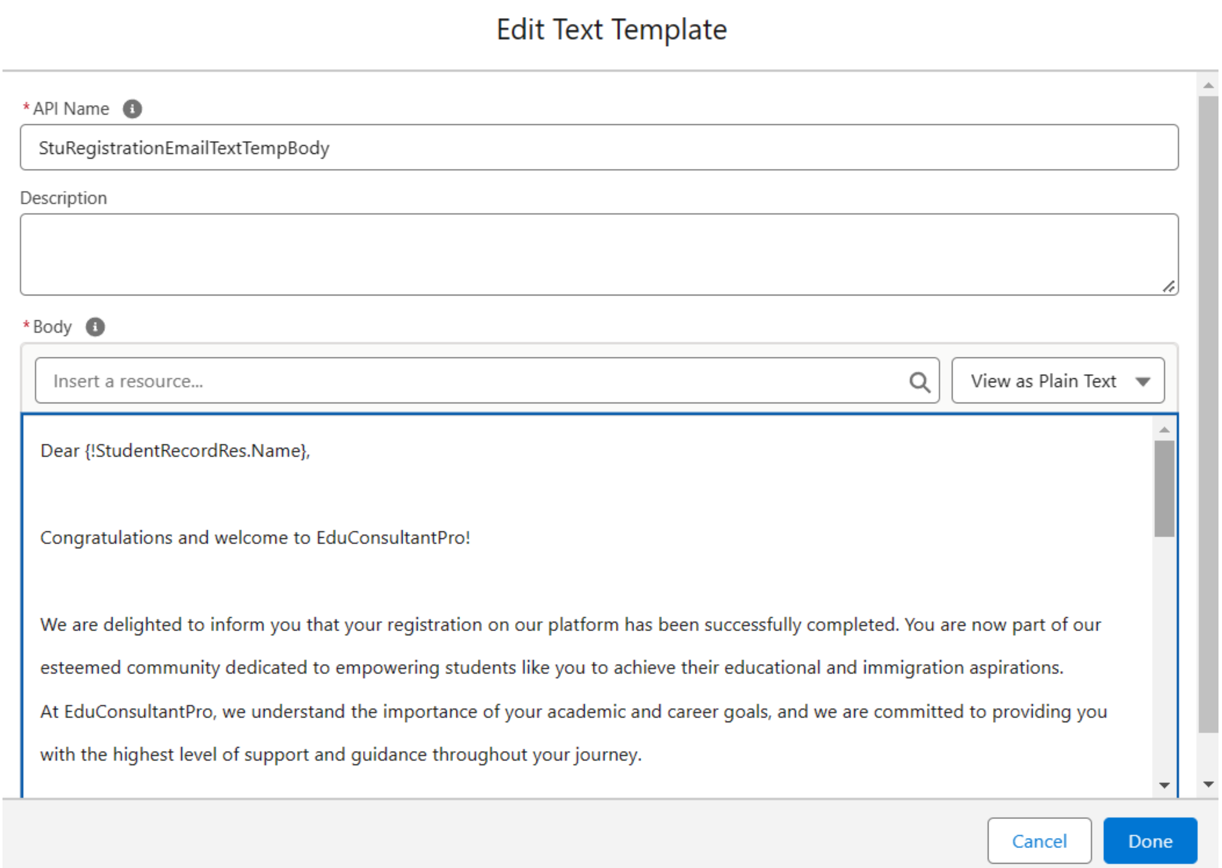
1. Add a **Create** element after each GET Record element.
2. **Label:** “Create [Course Name] Registration Rec”.
3. **How many records to Create:** “One”.
4. **How to Set the record fields:** Use separate resources, and literal values.
5. **Object:** Registration
6. Set fields:
    - **Course_Name_c:** {!Get_[Course Name]_Rec.Id}
    - **Student_Name_c:** {!StudentRecordRes.Id}



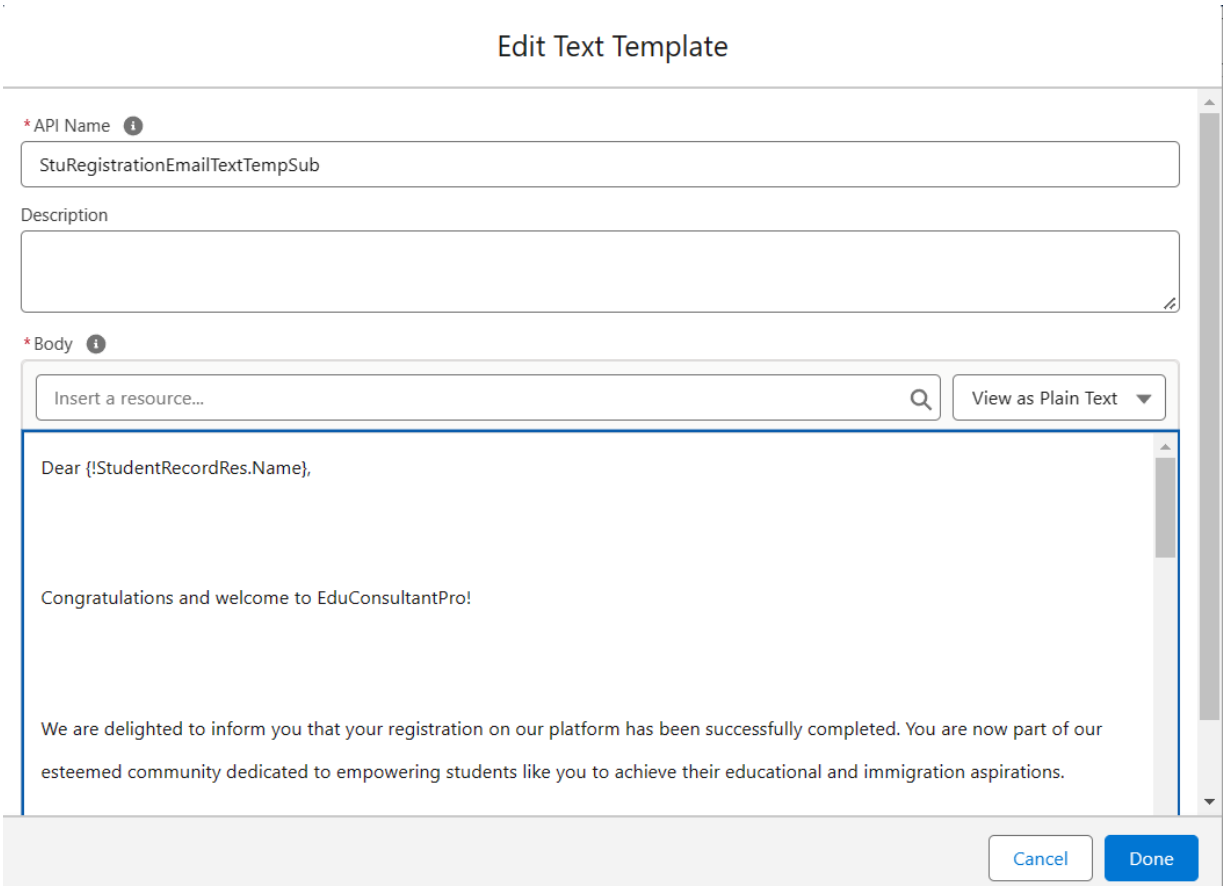
Subtask 7: Create Email Text Template Variables

Set up email templates for student registration confirmation.

1. Click the **toggle toolbox** on the left corner, select **New Resource**, and choose **Text Template**.
2. **API Name:** “StuRegistrationEmailTextTempBody”.
3. **Type:** View as plain text.
4. **Body:** Write a registration confirmation text.



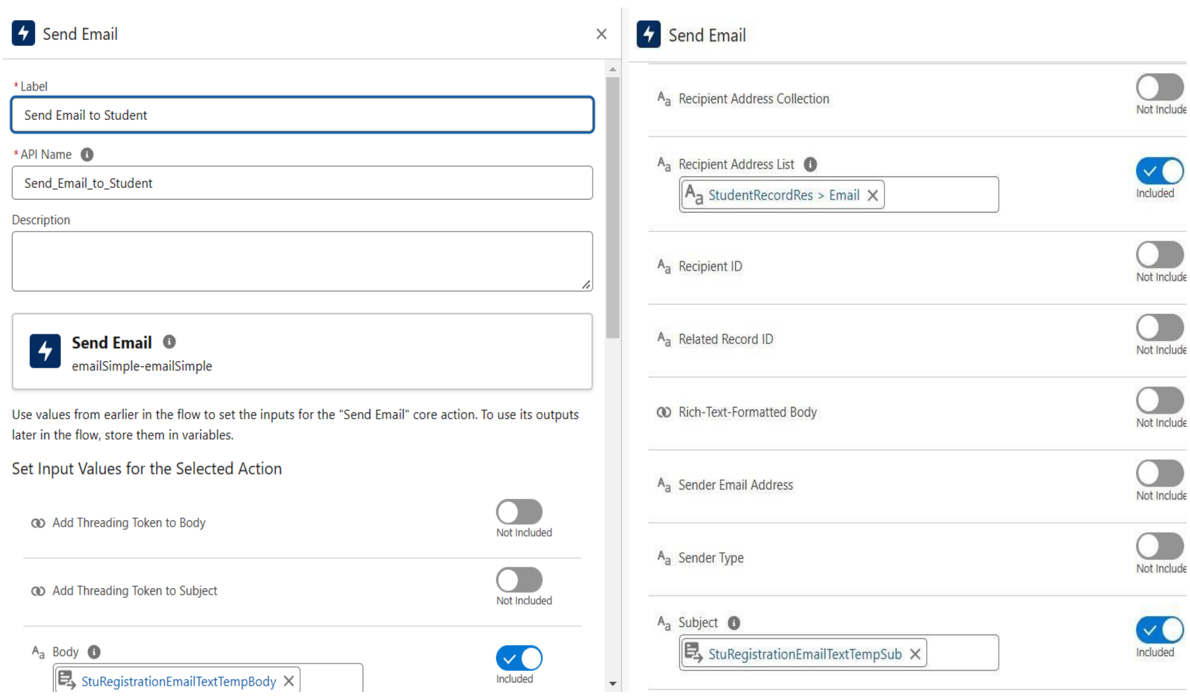
5. Repeat to create an email text template for the subject, **API Name:** “StuRegistrationEmailTextTempSub”.



Subtask 8: Add Action Element

Configure the action to send an email to the student.

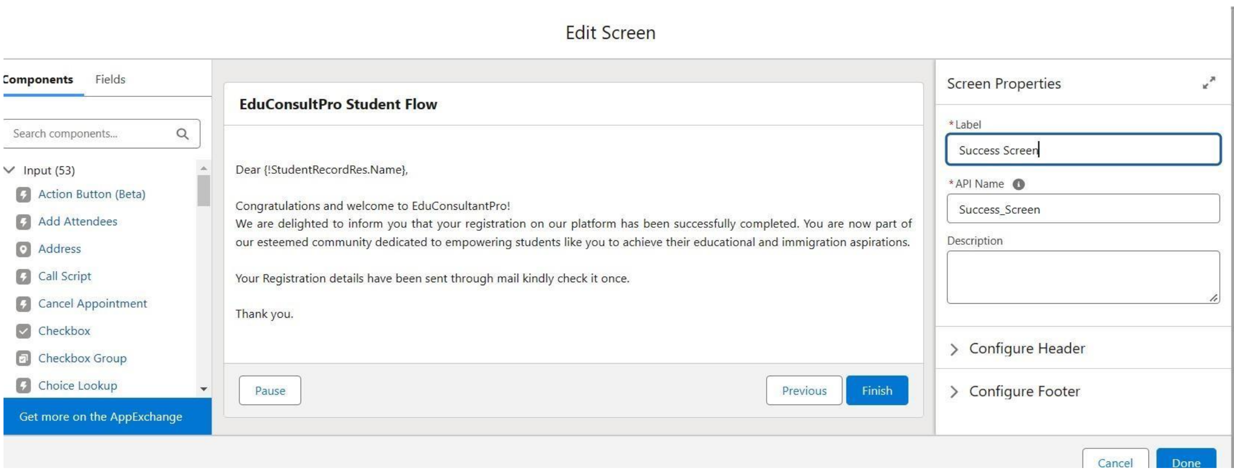
1. Add an **Action** element after all Decision paths.
2. **Label:** “Send Email to Student”.
3. **Input Values:**
   - **Body:** {!StuRegistrationEmailTextTempBody}
   - **Recipient Address List:** {!StudentRecordRes.Email_c}
   - **Subject:** {!StuRegistrationEmailTextTempSub}



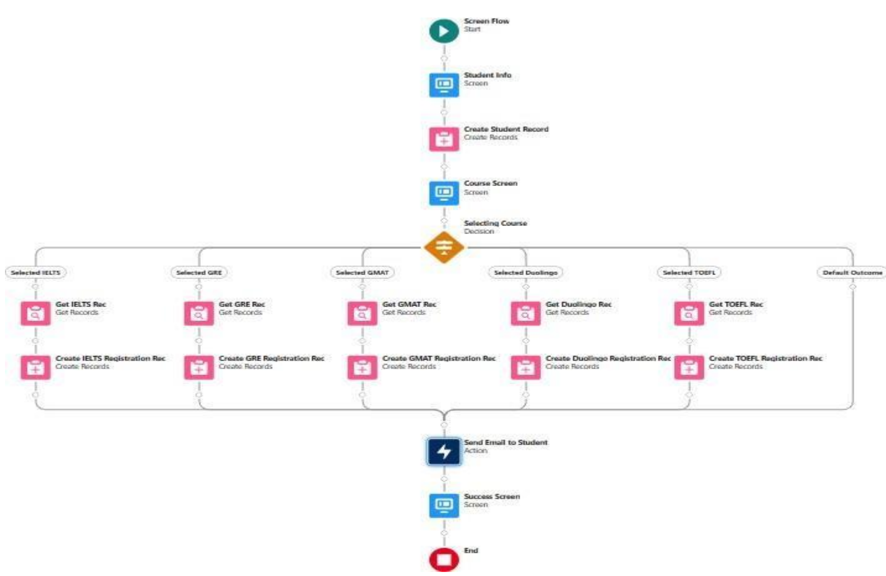
Subtask 9: Add Success Screen

Display a confirmation message to the student after the registration.

1. Add a **Screen** element after the Send Email to Student Action Element.
2. **Label:** "Success Screen".
3. Add a **Display Text** component:
    - **Label:** "SuccessMessage".
    - **Text:** Write the success message.



4. Save the flow and name it **"EduConsultPro Student Flow"**.



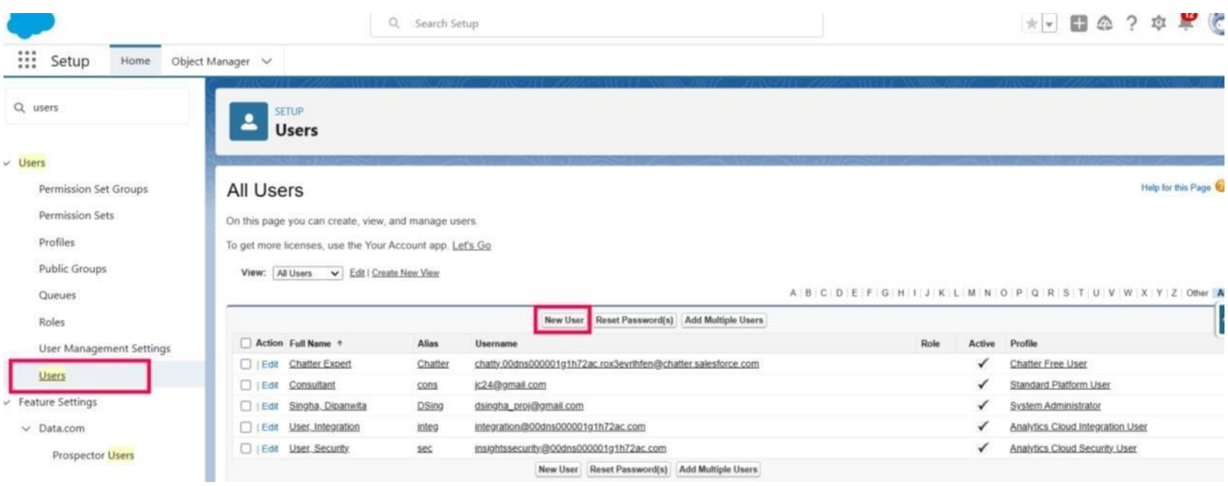
Task 5: Create Users

Set up a new user with the Standard Platform User profile and configure the user settings.

Subtask 1: Create a User

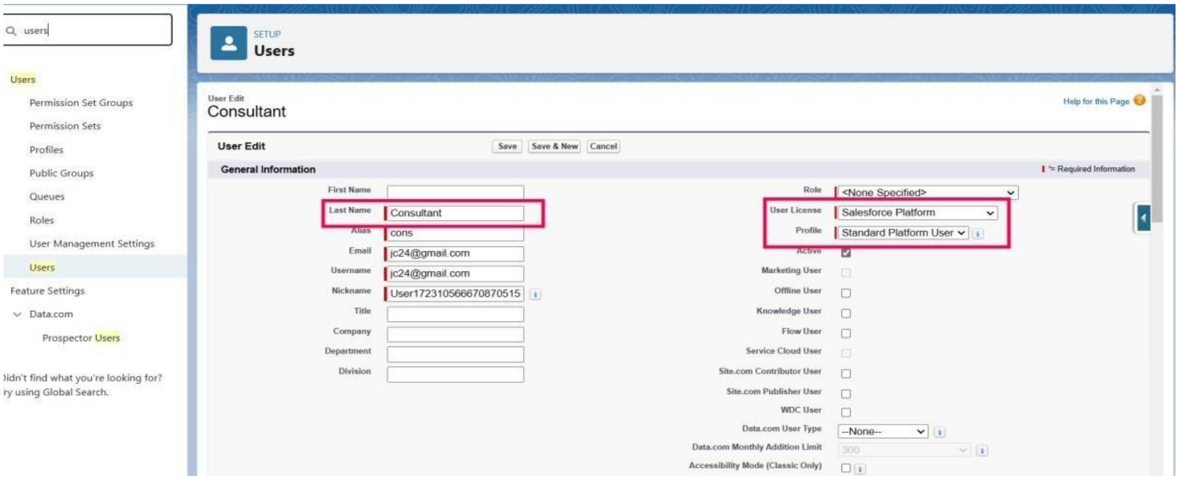
Create a new user with the Standard Platform User profile.

1. Navigate to **Setup** > **Users** > **New User**.



2. Enter the following details:
   - **Last Name:** Consultant
   - **License:** Salesforce Platform
   - **Profile:** Standard Platform User

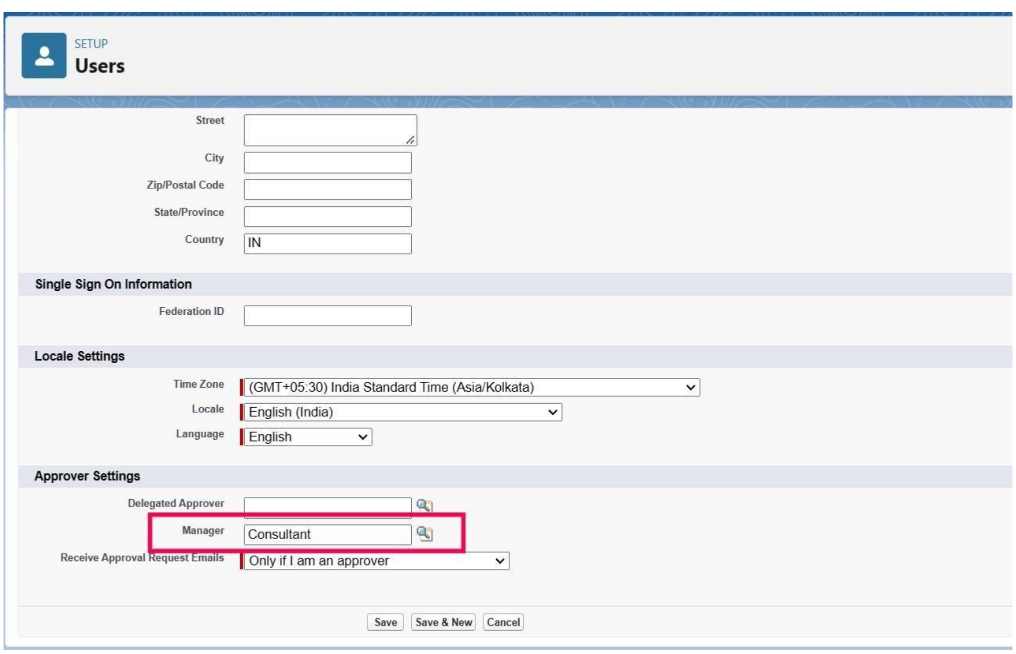
3. Complete all mandatory fields as required and save.



Subtask 2: Configure the User Settings

Update the user settings to include the appropriate approver settings.

1. Navigate to **Setup** > **Administration** > **Users** > Locate the newly created user and click **Edit** next to their name.
2. Scroll down to the **Approver Settings** section.
3. In the **Manager Field**, select "Consultant" and save.



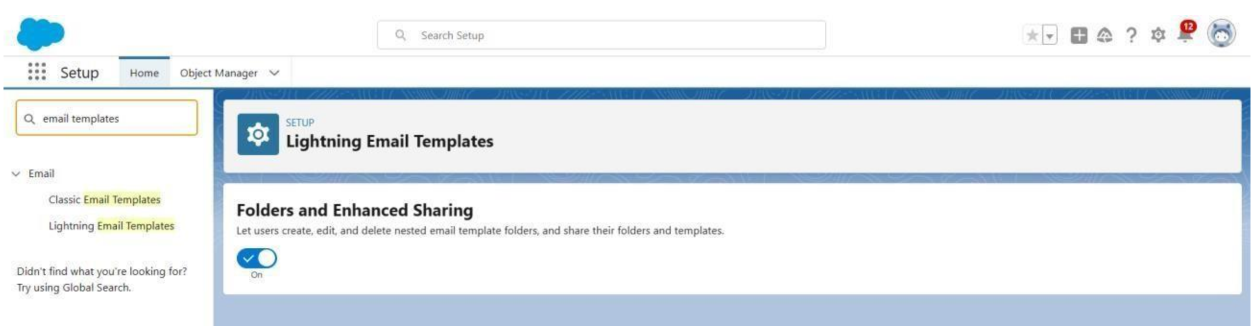
Task 6: Create an Approval Process for the Property Object

Establish an approval process for the Property object, including creating necessary email templates for notifications.

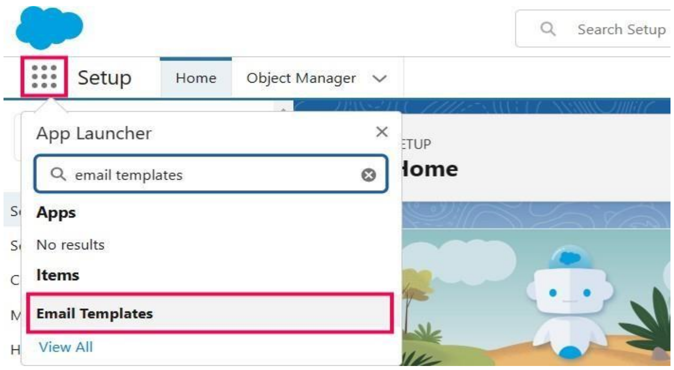
Subtask 1: Create Email Templates

Create and configure email templates to be used in the approval process.

1. Navigate to **Setup**, enter **Templates** in the Quick Find box, and select **Lightning Email Templates**. Toggle on.

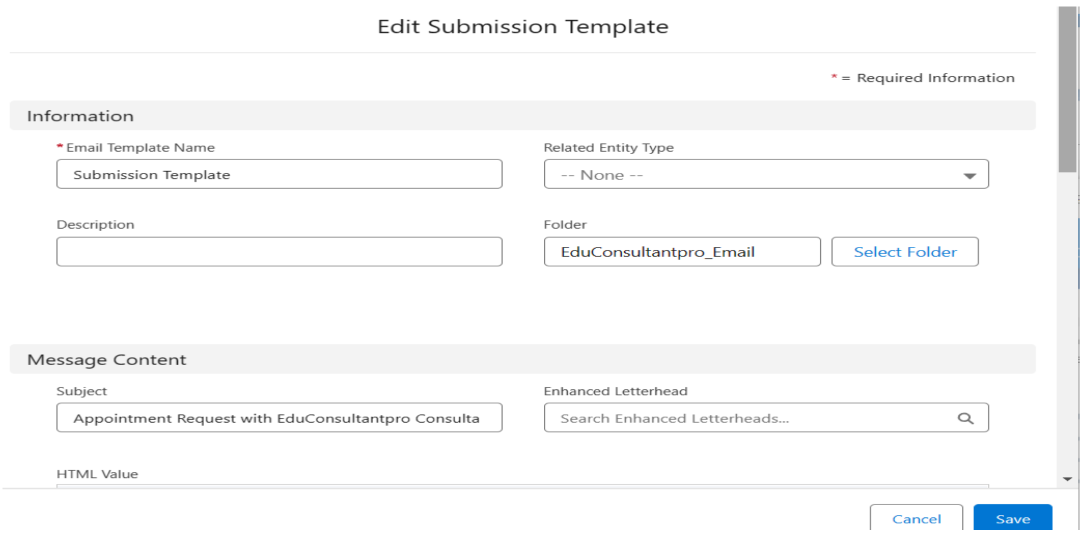


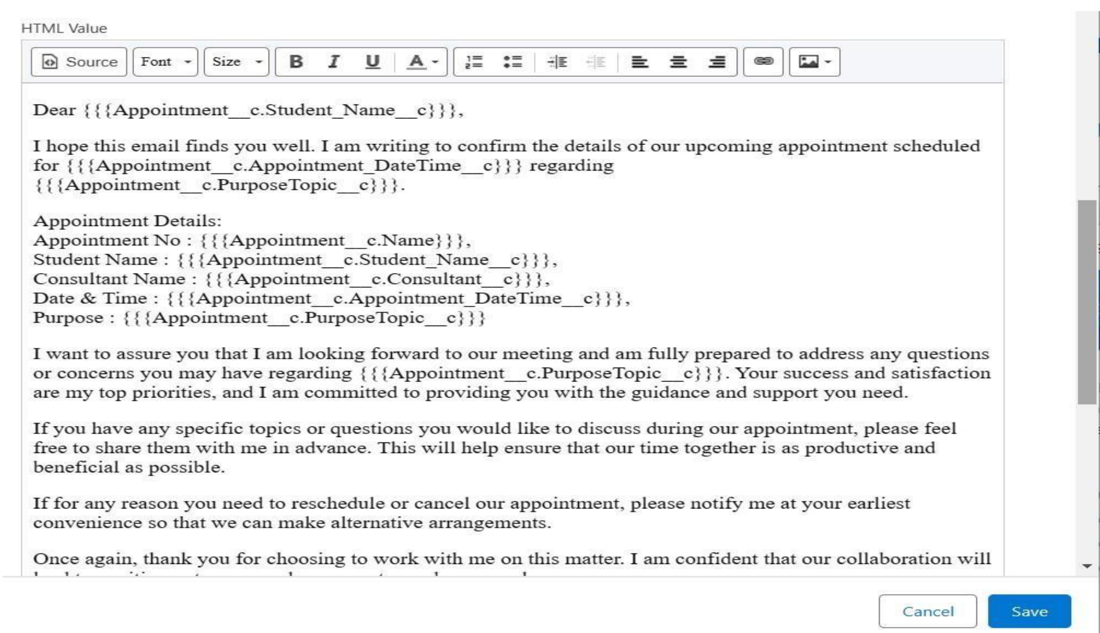
2. Go to the **App Launcher**, search for **Email Templates**, and create a new folder with the desired name.



3. Create a new email template within the created folder:

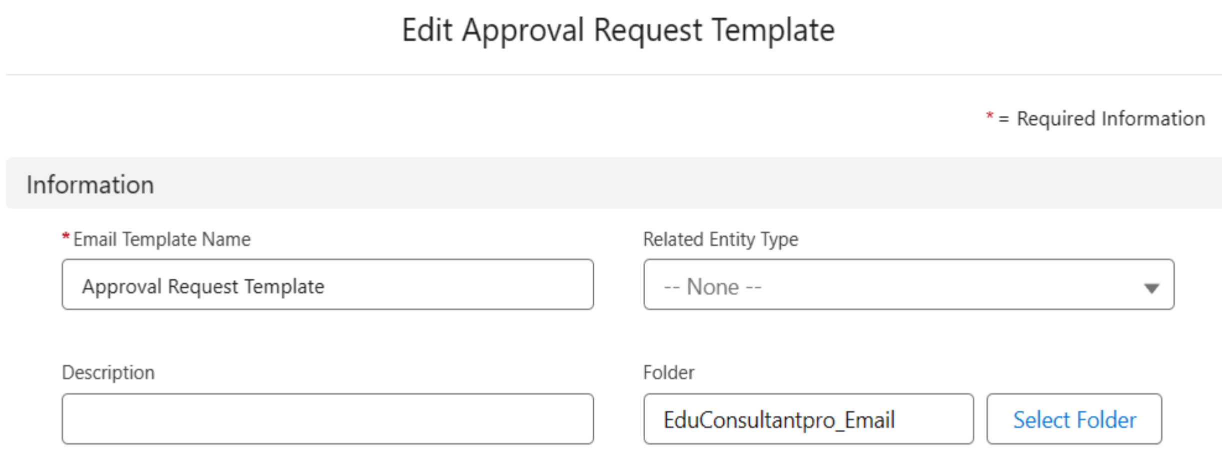
- **Template Name:** Submission Template
- Write a message in the HTML Value

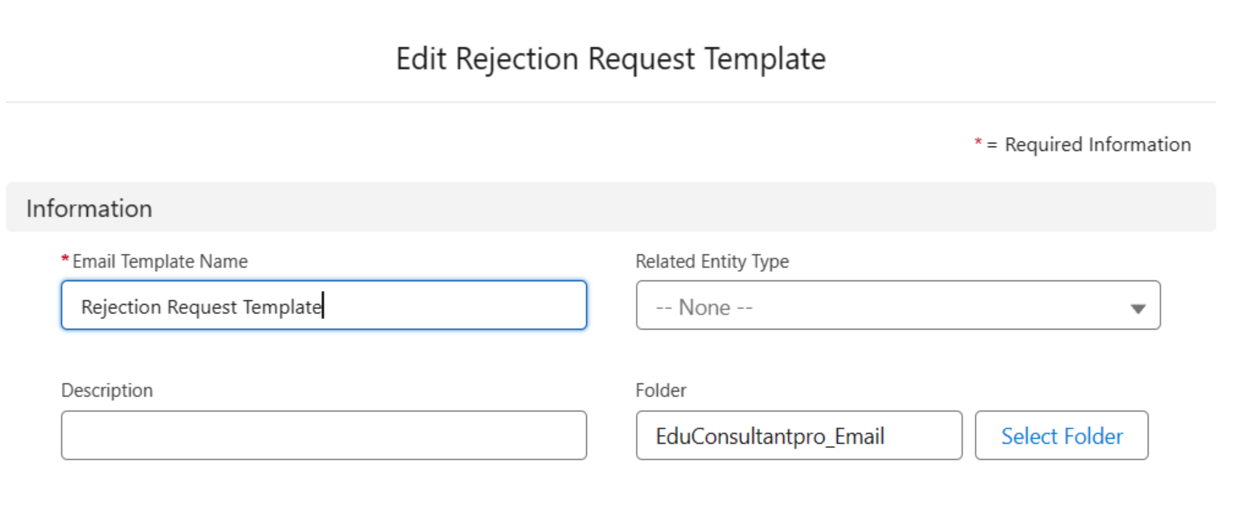


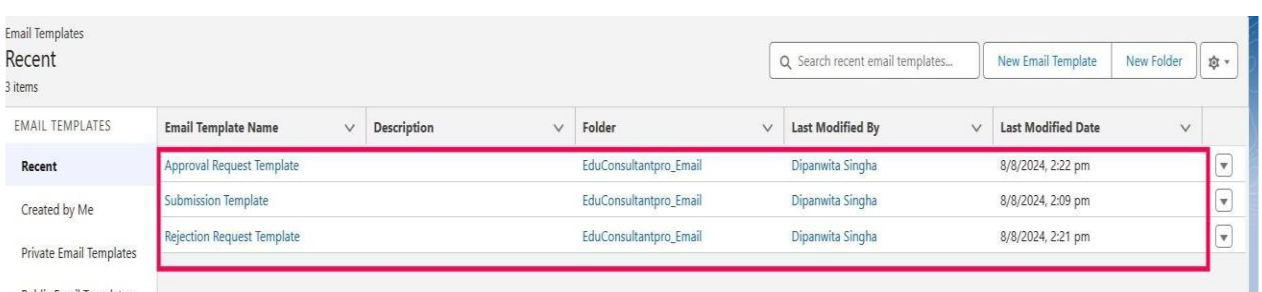


4. Create two additional email templates:
    - **Approval Template**: Similar to the Submission Template but tailored for approval notifications.

- **Rejection Template**: Similar to the Submission Template but tailored for rejection notifications.



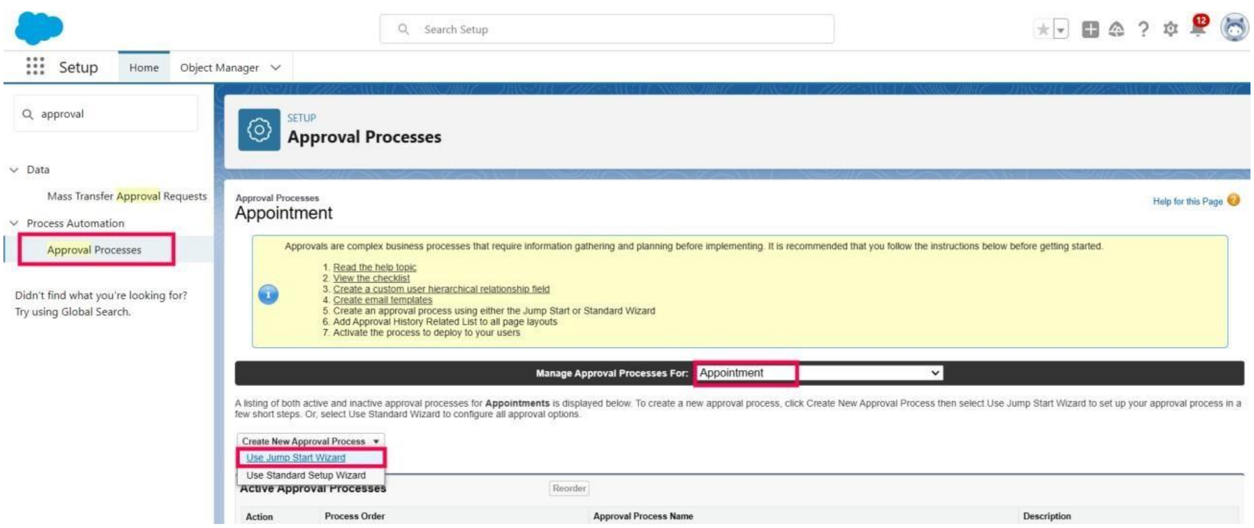




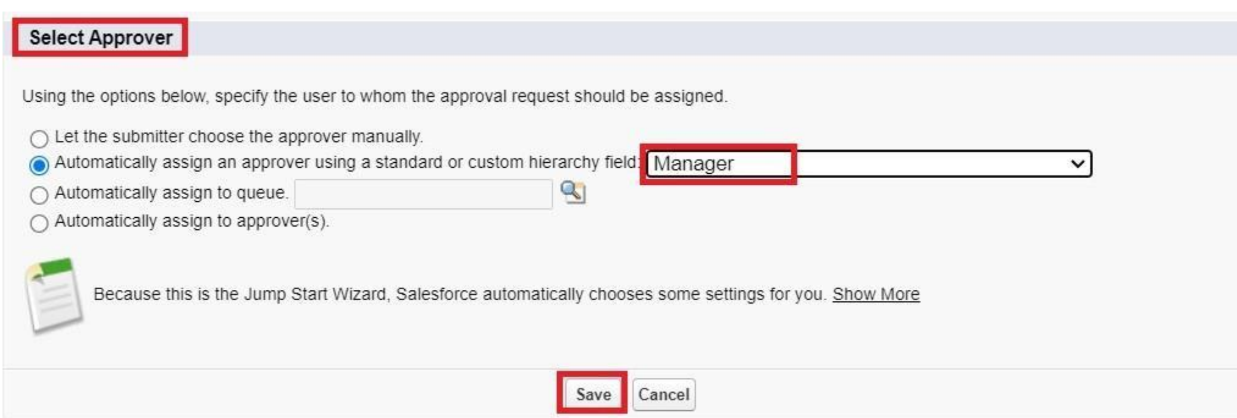
Subtask 2: Create An Approval Process

Configure an approval process for the Appointment object to manage request approvals.

1. Navigate to **Setup**, enter **Approval** in the Quick Find box, and select **Approval Processes**.
2. In **Manage Approval Processes For**, select **Appointment**.
3. Click **Create New Approval Process** and choose **Use Jump Start Wizard**.

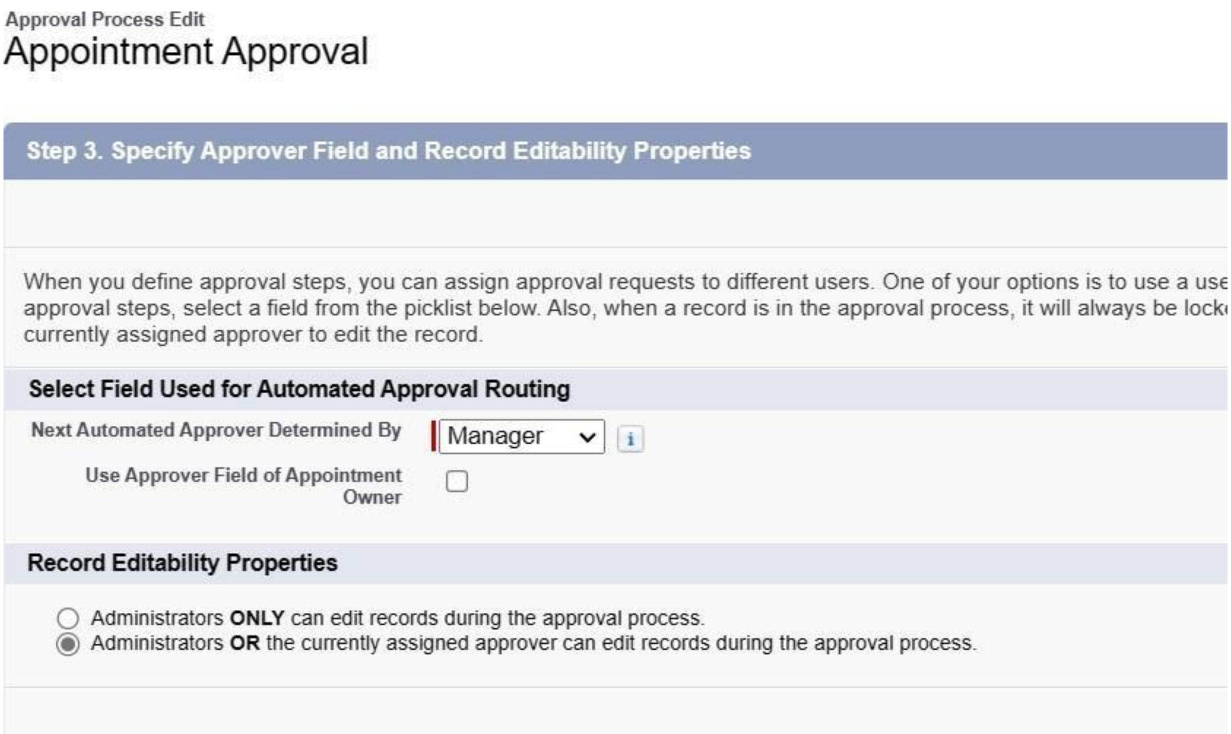


4. Configure the approval process:
   - **Process Name:** Appointment Approval
   - **Approver Selection:** Select **Manager** for "Automatically assign an approver using a standard or custom hierarchy field."



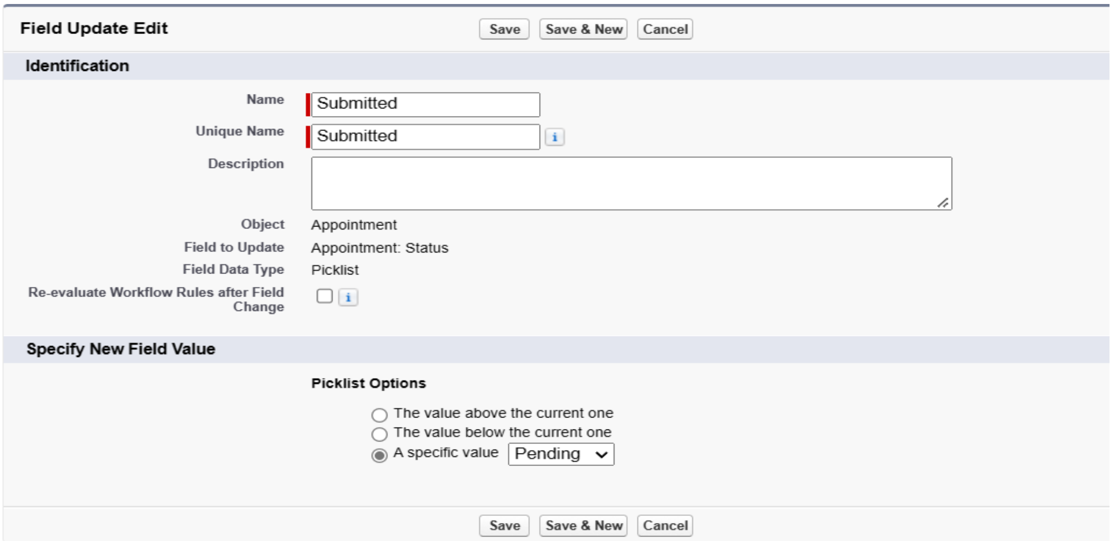
5. Click **Next** and select **Manager** for the option **Automated Approver Determined By**.

6. Under **Record Editability Properties**, select **Administrators** OR the currently assigned approver can edit records during the approval process.
7. Click **Save**.

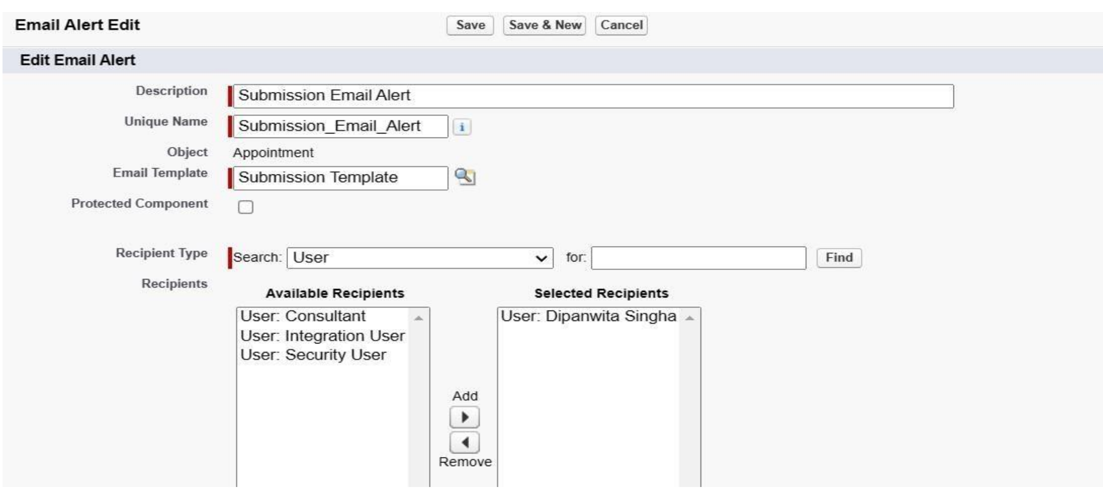


8. Click **View Approval Process Detail Page**.

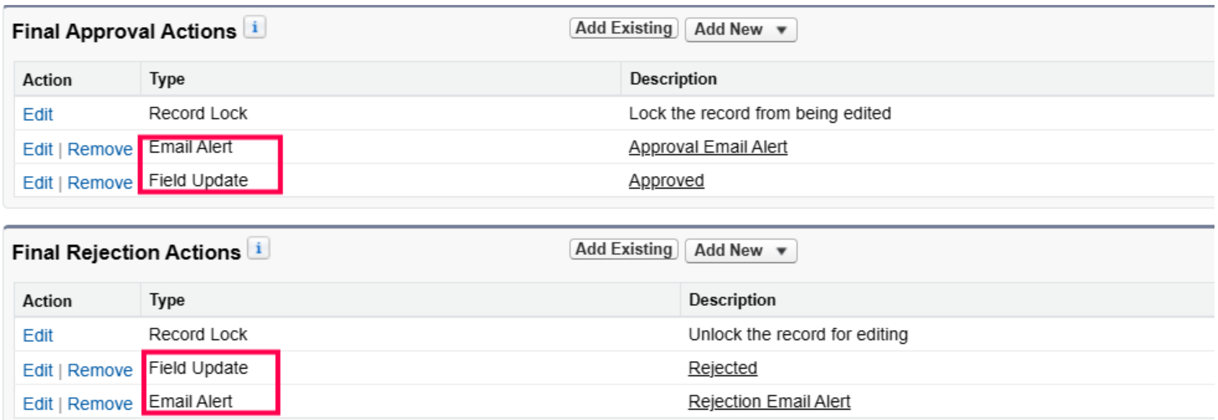
9. Under **Initial Submission Actions**, click **Add New**:
    - Select **Field Update**:
        - **Field to Update:** Appointment: Status
        - **Value:** Pending



10. Click **Add New**:
    - Select **Email Alert**:
        - **Description:** Submission Email Alert
        - **Email Template:** Submission Template
        - **Recipient Type:** Select your Name



11. Repeat steps 9 and 10 for **Final Approval** and **Final Rejection** actions using the appropriate templates and values.



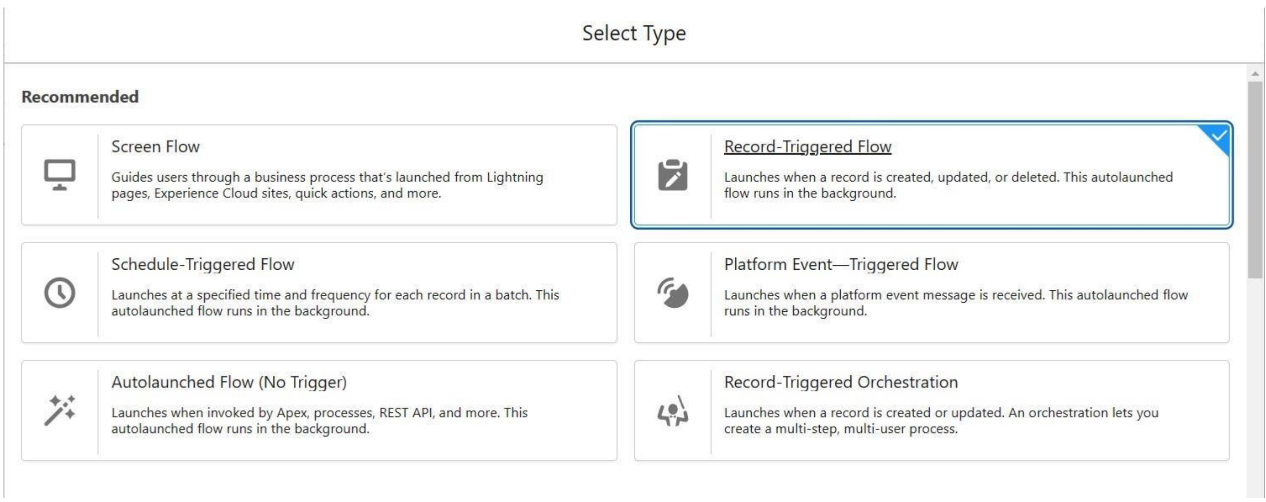
Task 7: Create A Record-Triggered Flow

Set up a Record-Triggered Flow to automate the submission of Appointment records for approval.

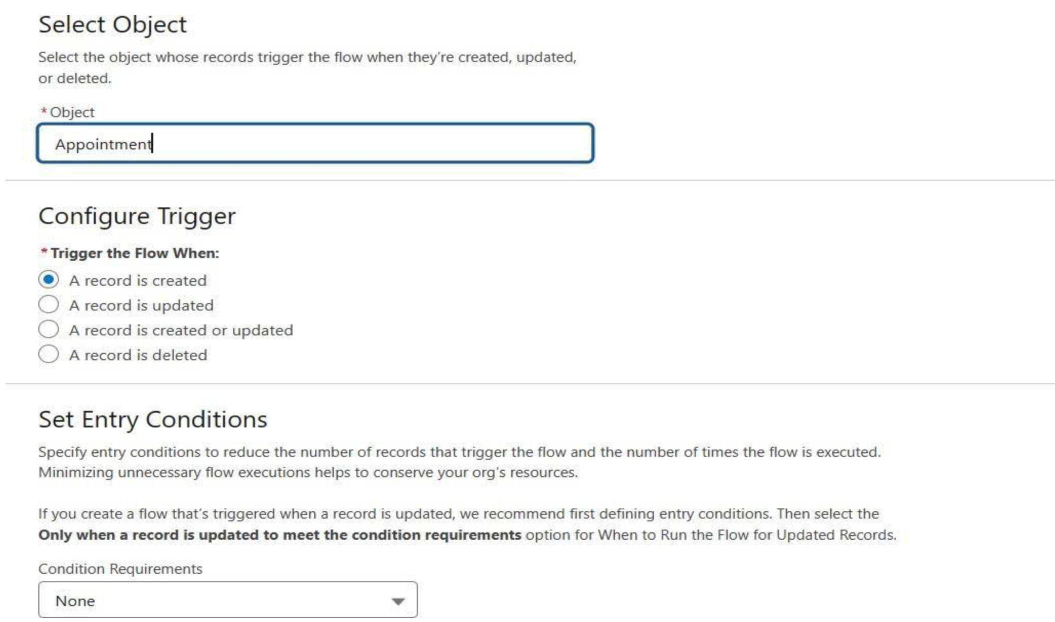
Subtask 1: Configure the Start Element

Initiate a flow that triggers upon the creation of an Appointment record.

1. From **Setup**, enter **Flows** in the Quick Find box, then select **Flows**.
2. Click **New Flow**.
3. Select **Record-Triggered Flow**.



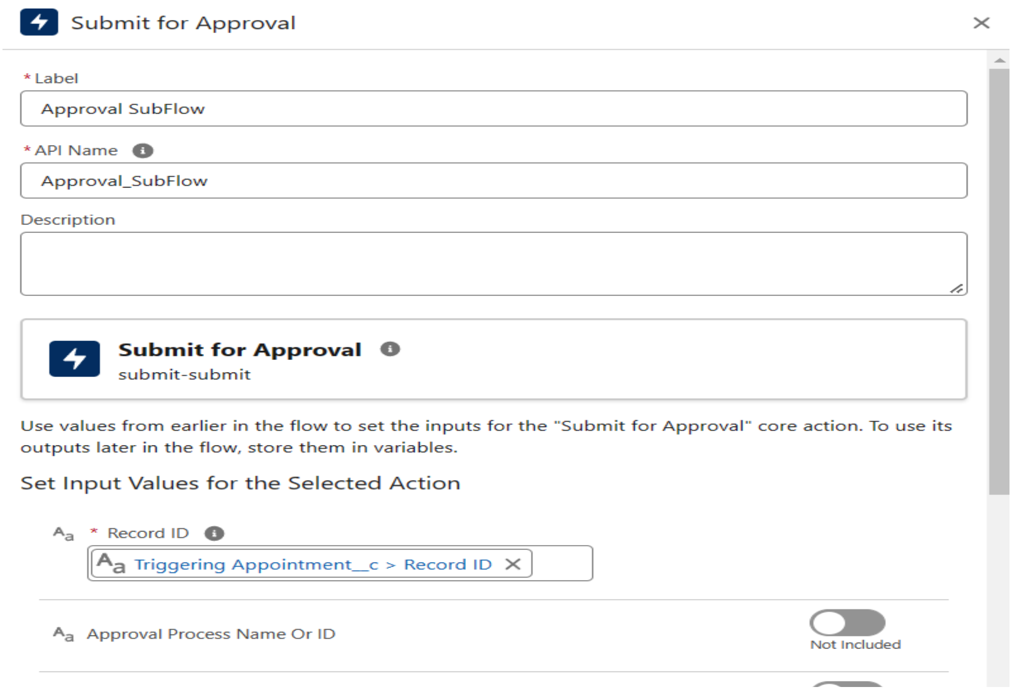
4. Click **Create**. The **Configure Start** window opens.
5. For **Object**, select **Appointment**.
6. For **Trigger the Flow When**, select **A record is created**.



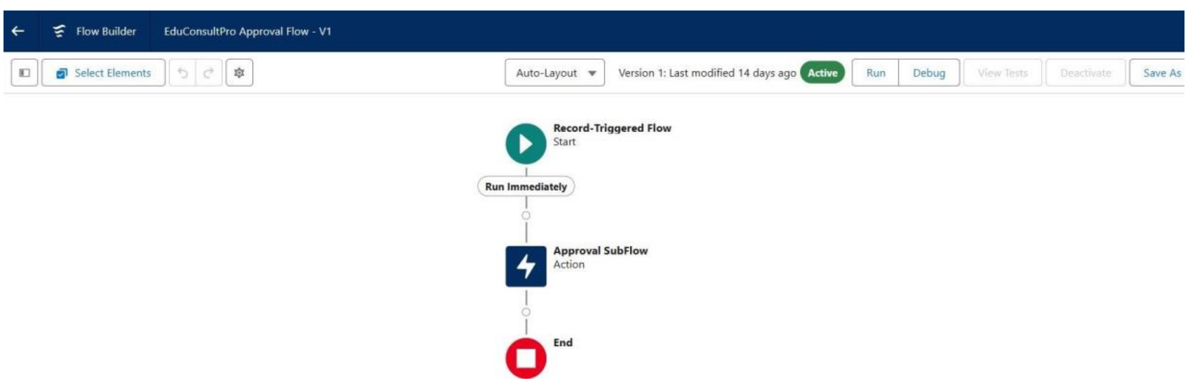
Subtask 2: Add An Action Element

Add an Action element to submit the Appointment record for approval automatically.

1. Add an **Action** element after the **Start** element.
2. Select the **Submit for approval** action and label it as **Approval SubFlow**.
3. Set the **RecordId** to **{!$Record.Id}**.



4. Save the Flow, label it as **EduConsultPro Approval Flow**, and click **Activate**.

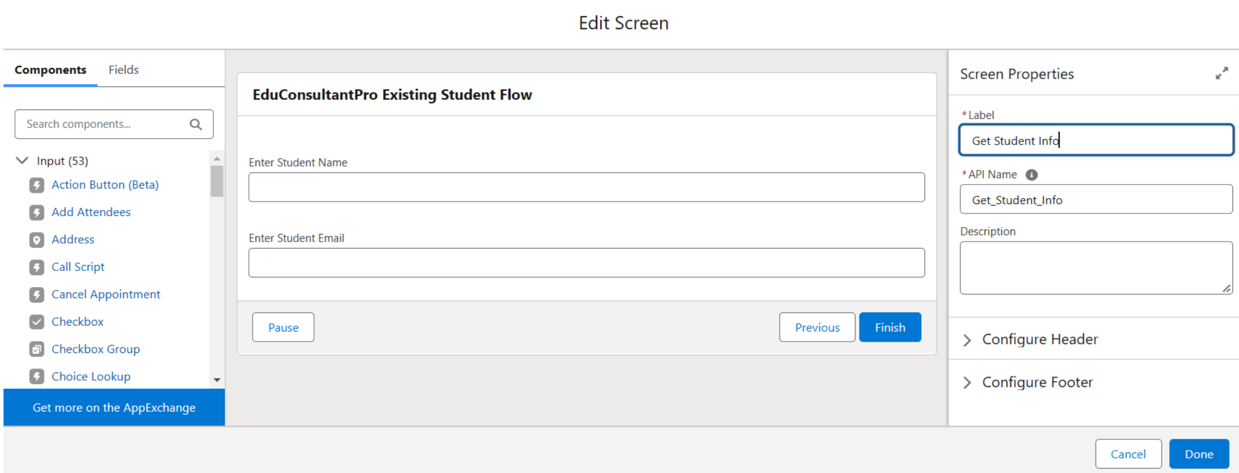


Task 8: Create A ScreenFlow For Existing Students To Book An Appointment

Subtask 1: Add Screen Element

Start the flow by gathering student information using a Screen element.

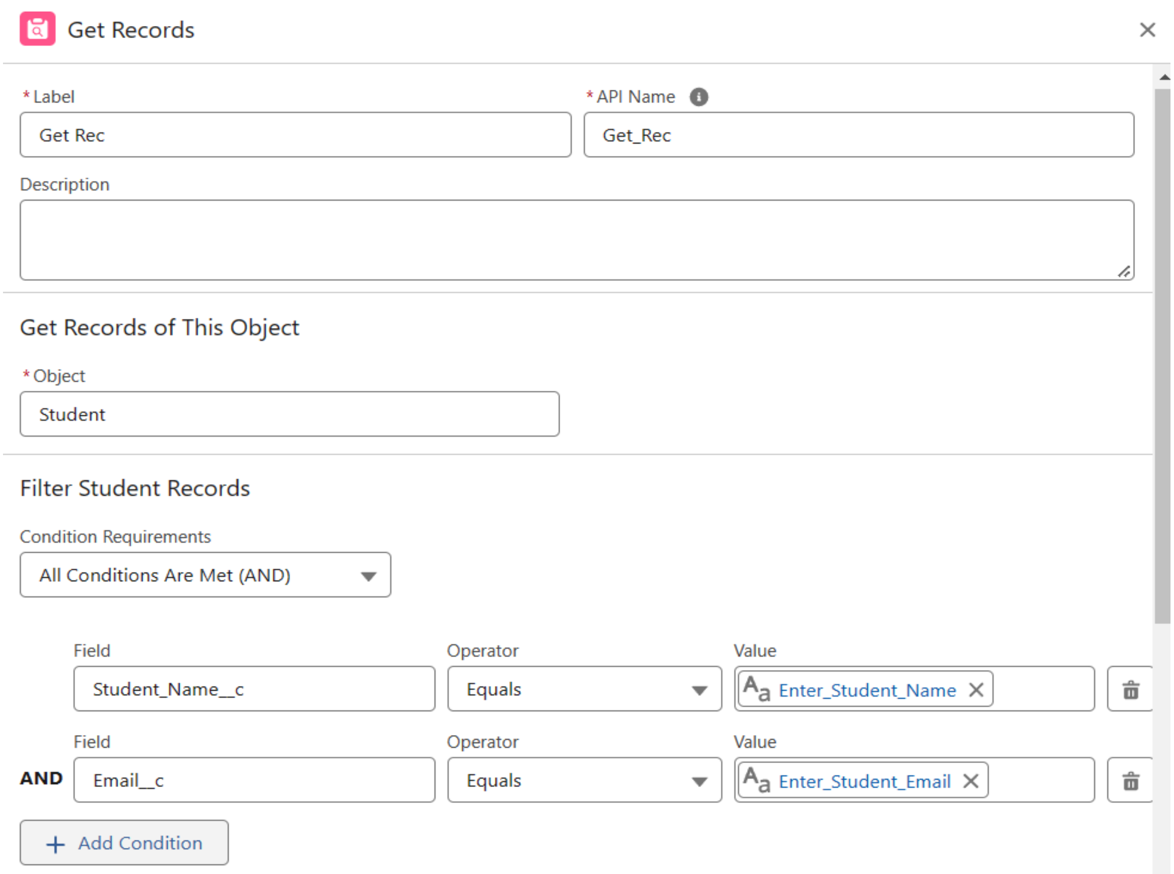
1. From **Setup**, enter **Flow Builder** in Quick Find and select **New Flow** → **ScreenFlow**.
2. Add a **Screen** element.
3. In the **Screen Properties** pane, for **Label**, enter **“Get Student Info”**.
4. Add two **Text** components from the left-side panel.
    - 1st Text Component Label: **Enter Student Name**
    - 2nd Text Component Label: **Enter Student Email**



5. Click **Done**.

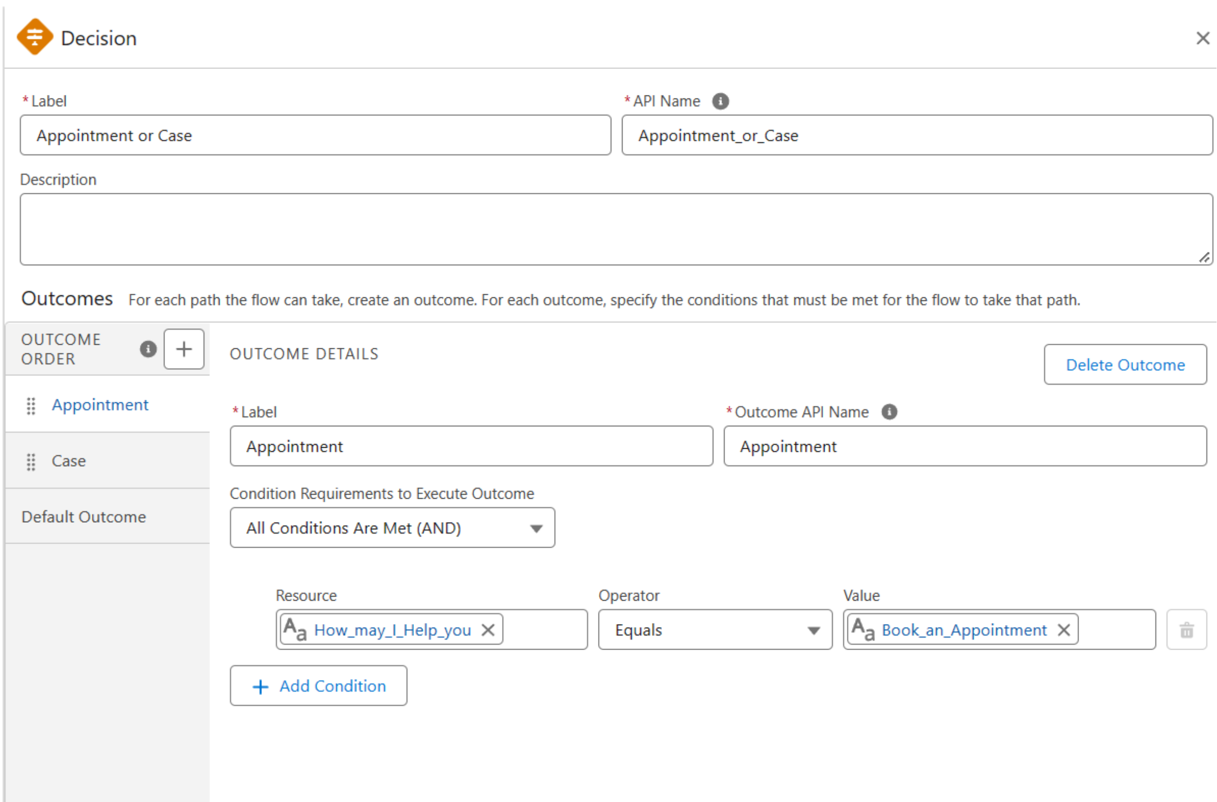
Subtask 2: Get Record

1. Add a **GET Record** element after the Screen element, label it as **“Get Rec”**.
2. Configure the GET Record element:
    - **Select Object:** Student
    - **Condition Requirement:** All Conditions are Met (AND)
    - **Field:** Student Name
        - **Operator:** Equals
        - **Value:** {!Enter_Student_Name}
    - **Field:** Email_c
        - **Operator:** Equals
        - **Value:** {!Enter_Student_Email}



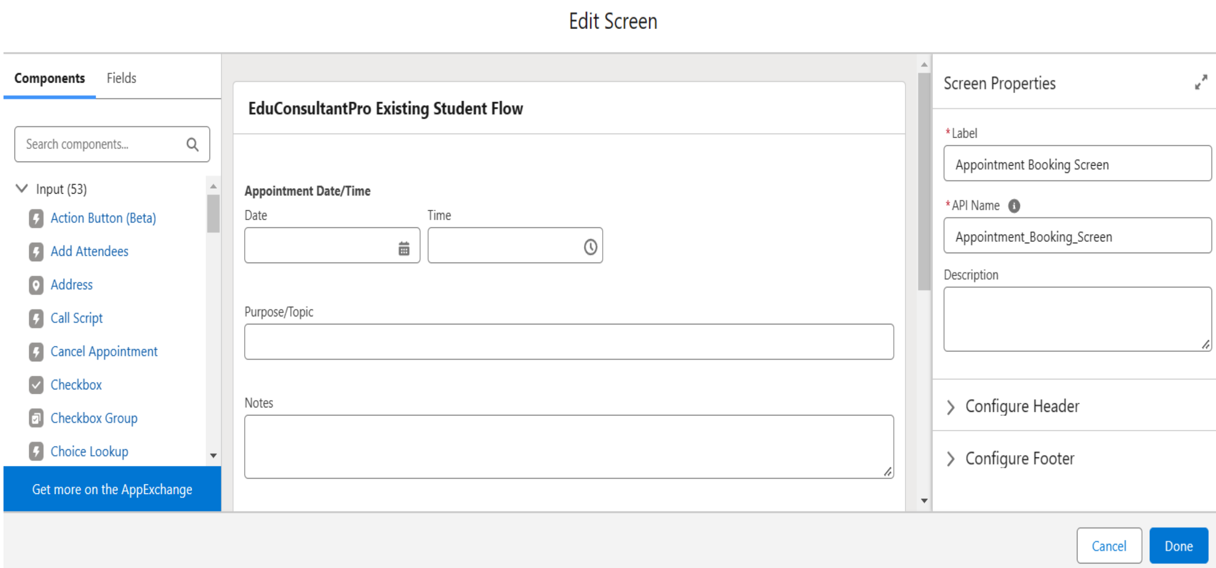
Subtask 3: Add a Decision Element

1. Add a **Decision** element after the GET Record element, label it as **"Appointment or Case"**.
2. Configure the Decision element:
   - **Outcome Label:** Appointment
     - **Resource:** {!How_may_I_Help_you}
     - **Operator:** Equals
     - **Value:** {!Book_an_Appointment}
   - Click on the "+" icon to add paths for other options such as Case, Default.



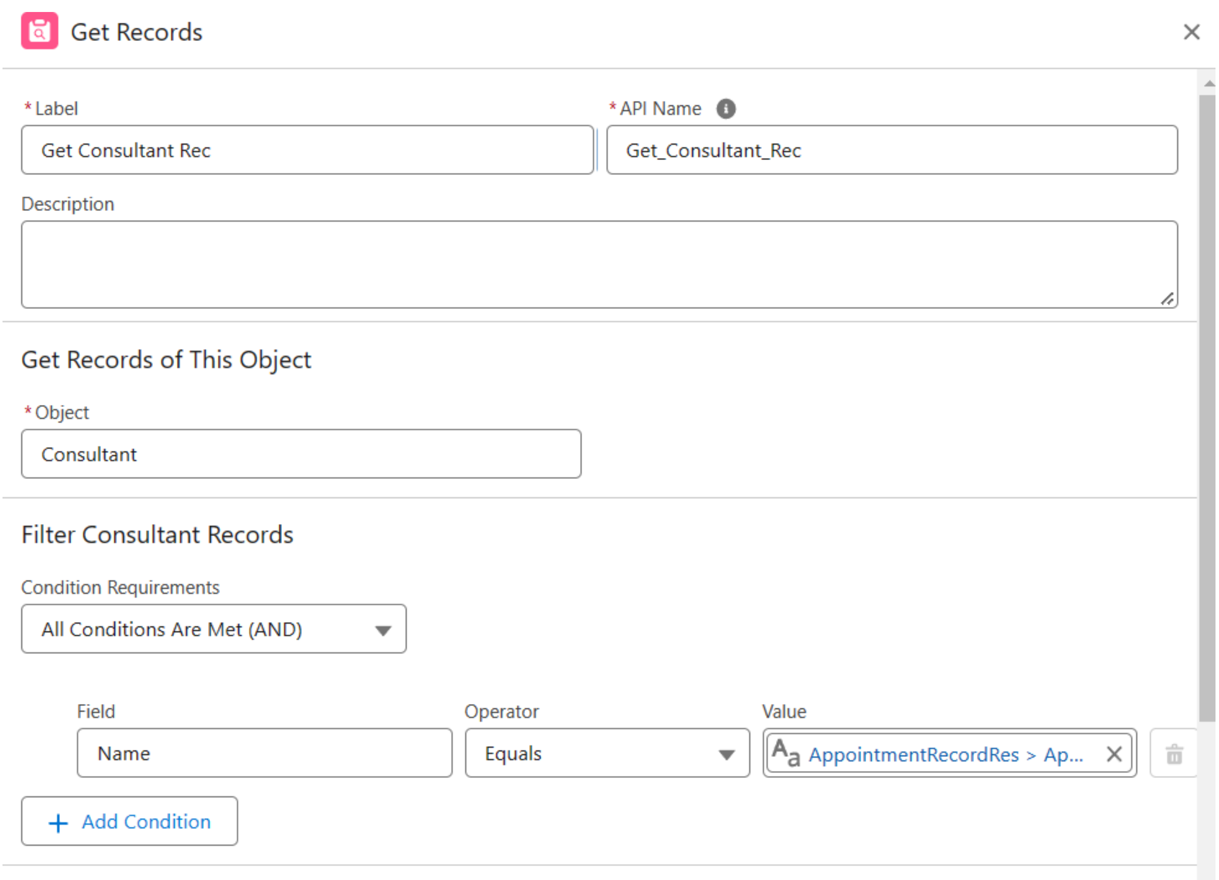
Subtask 4: Add Screen Element

1. Add a **Screen** element after the Decision element, on the Appointment path, and label it as **"Appointment Booking Screen"**.
2. Click on **Fields**, then **Record Variable Input**, and create a new Resource (AppointmentRecordRes) to display all the fields in the Appointment object.
3. Drag the necessary fields onto the screen to collect student information.
4. Click **Done**.



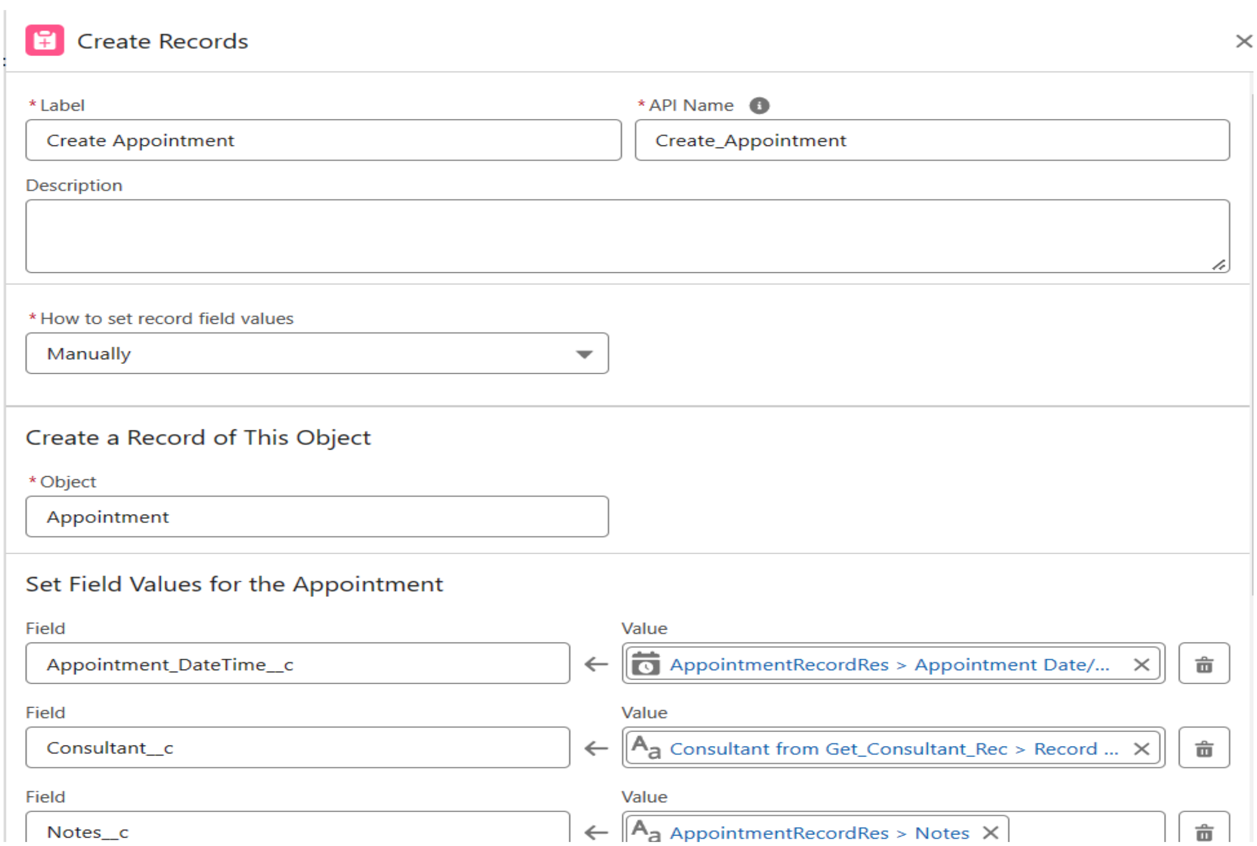
Subtask 5: Add GET Record Element

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



Subtask 6: Create Appointment Record Using Create Records Element

1. Add a **Create** element after the GET Consultant Rec element and label it as **“Create Appointment”**.
2. Configure the Create element:
   - **Select Object:** Appointment
   - **Field Values:**
     - **Appointment_DateTime_c:** {!AppointmentRecordRes.Appointment_DateTime_c}
     - **Consultant_c:** {!Get_Consultant_Rec.Id}
     - **Notes_c:** {!AppointmentRecordRes.Notes_c}
     - **PurposeTopic_c:** {!AppointmentRecordRes.PurposeTopic_c}
     - **Student_Name_c:** {!Get_Rec.Id}



Subtask 7: Add Screen Element

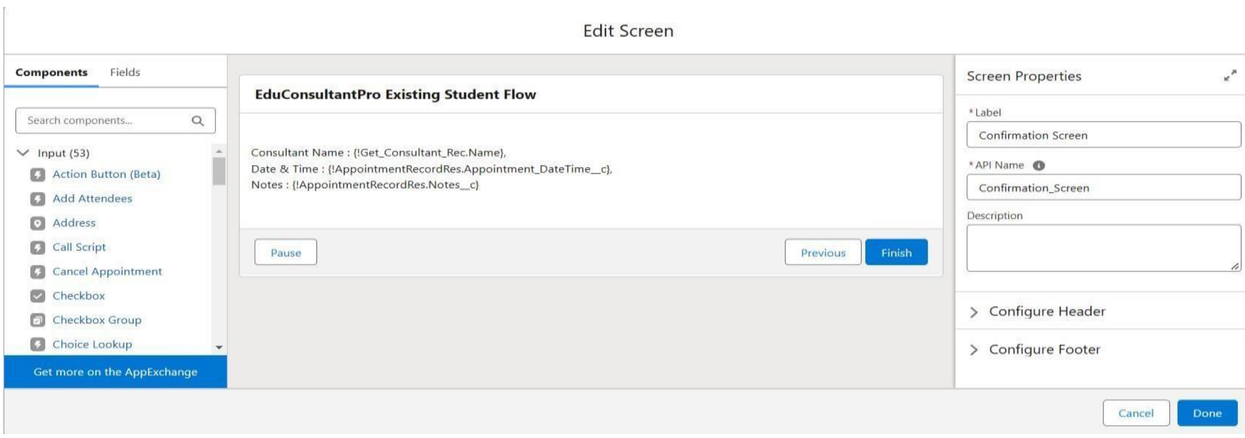
1. Add a **Screen** element after the Create Appointment element, and label it as **"Confirmation Screen"**.
2. From the left side panel, search for the **Display Text** component and drag it to the main panel, label it as **"Appointment_Confirmation"**.
3. Paste the following text in the Resource picker box:

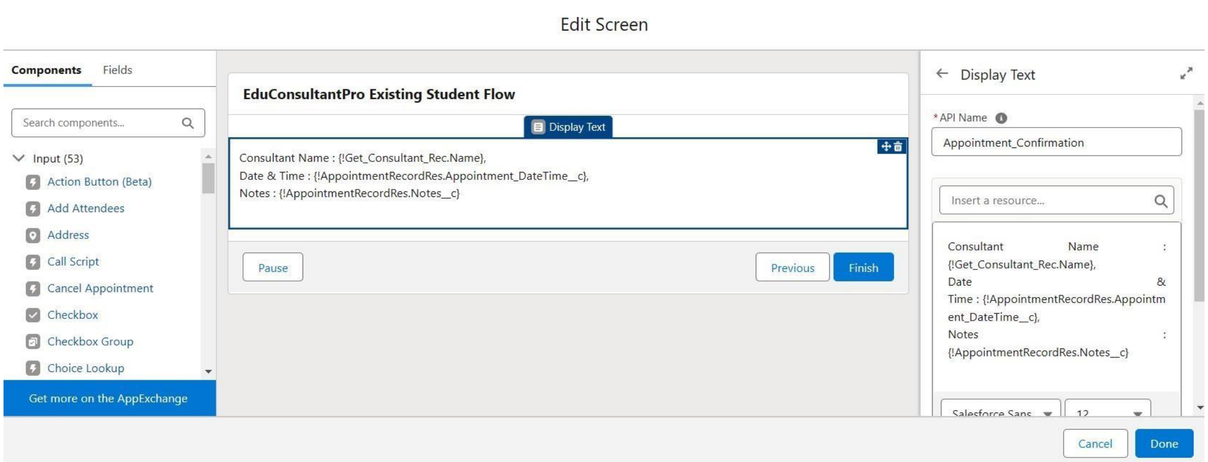
    Consultant Name : {!Get_Consultant_Rec.Name},

    Date & Time : {!AppointmentRecordRes.Appointment_DateTime_c},

    Notes : {!AppointmentRecordRes.Notes_c}

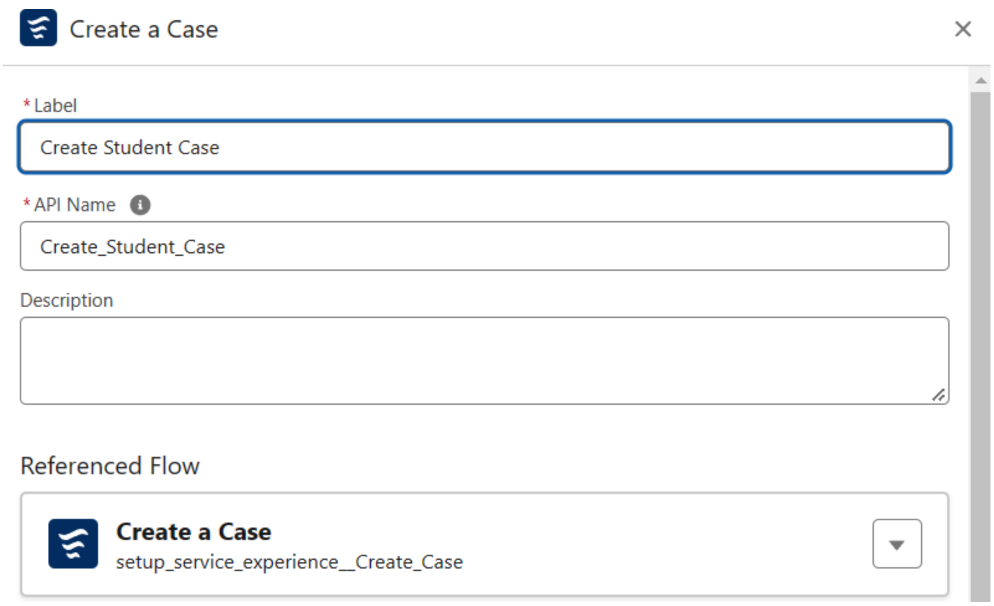
4. Click Done.



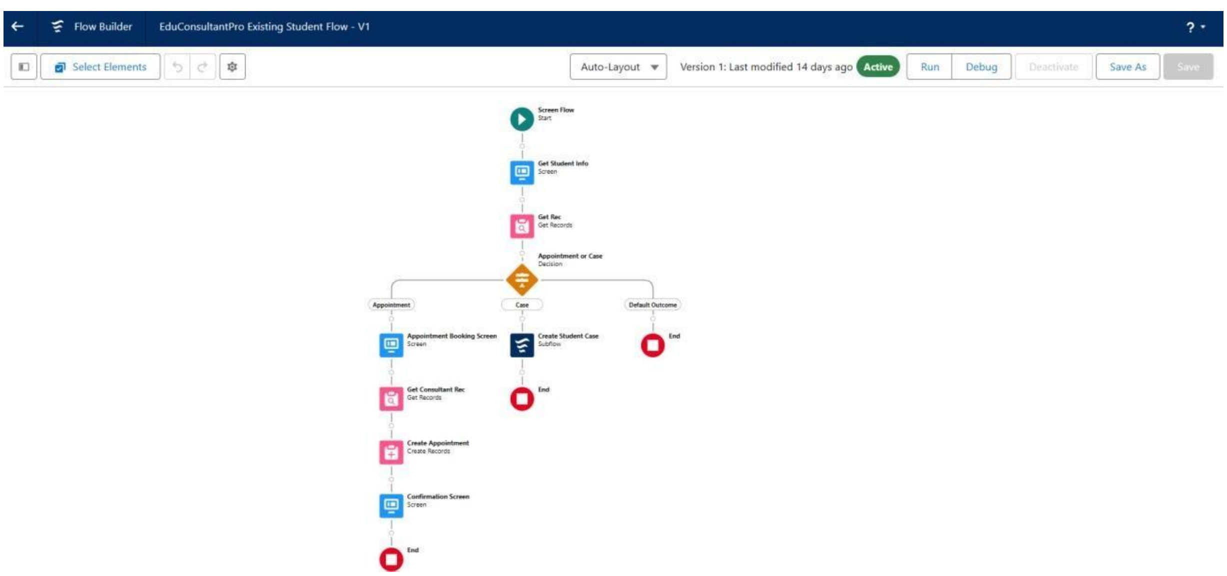


Subtask 8: Add a Subflow Element

1. Add a **Subflow** element after the Decision element, on the Case path, and search and select **"Create a Case"**, label it as **"Create Student Case"**.
2. Configure the Subflow element as needed.



3. Save the flow, label it as **"EduConsultantPro Existing Student Flow"**, and activate it.



Task 9: Create A ScreenFlow to Combine All The Flows At One Place

This task involves creating a central ScreenFlow that integrates various existing flows, allowing users to choose and access different functionalities from a single interface.

Subtask 1: Add Welcome Screen Element

1. From Setup, enter **Flow Builder** in the Quick Find box, select **New Flow → Screen Flow**.
2. Add a **Screen** element and label it as **“Welcome Screen”**.
3. From the left side panel, drag the **Display Text** component to the main panel.
4. Label the Display Text component as **“SuccessMessage”**.
5. Paste the following text into 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.

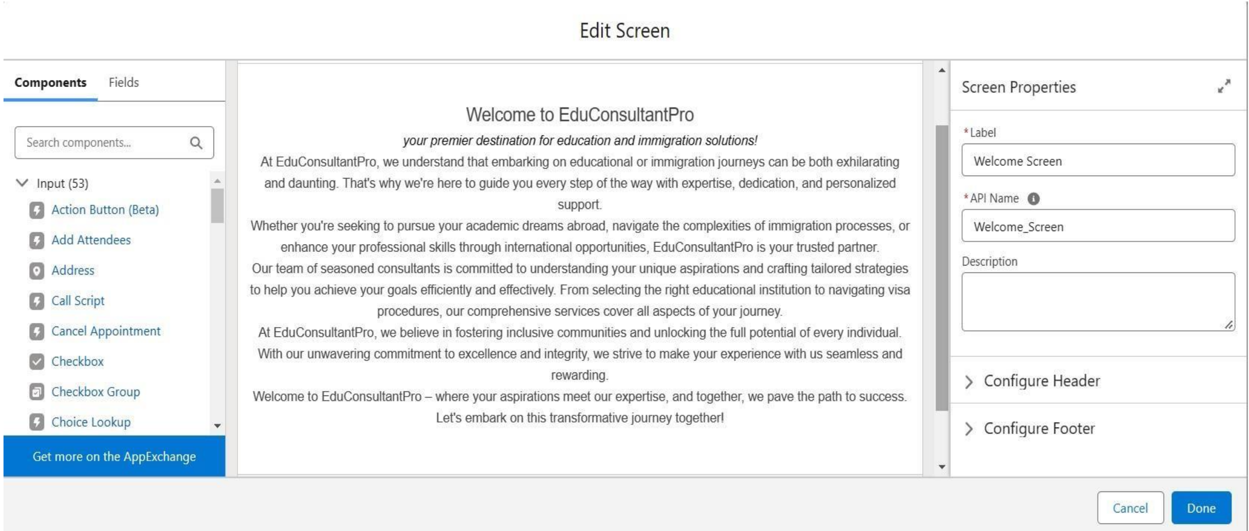
Whether you're seeking to pursue your academic dreams abroad, navigate the complexities of immigration processes, or enhance your professional skills through international opportunities, EduConsultantPro is your trusted partner.

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!”

6. Click **Done**.

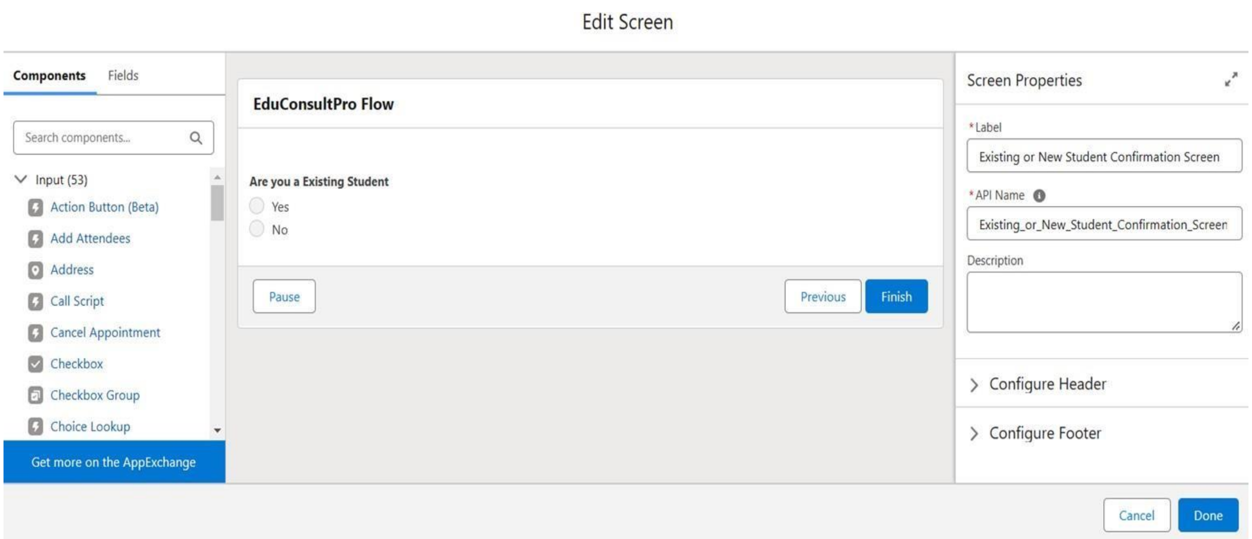


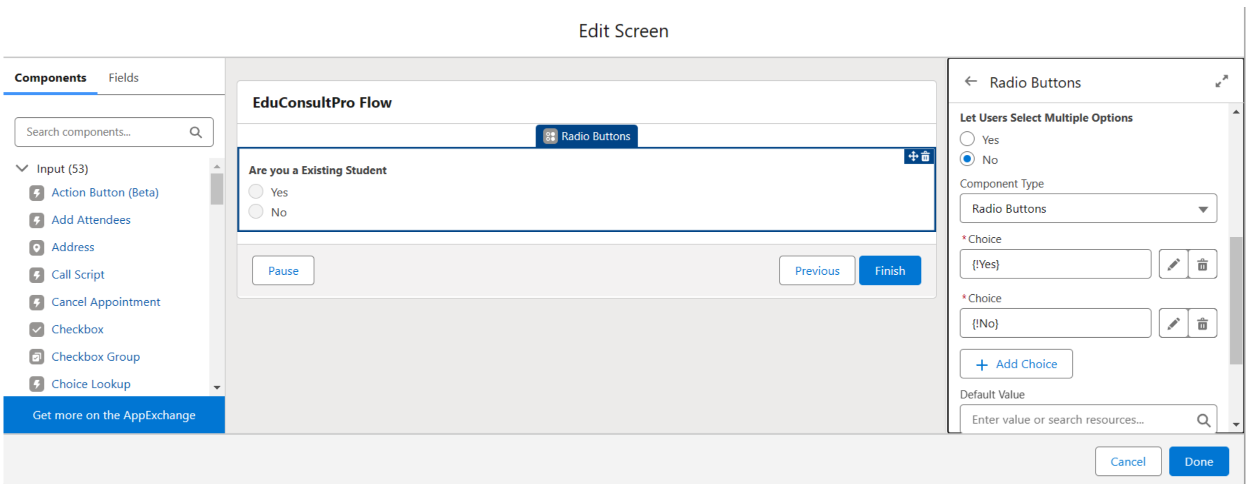
Subtask 2: Add Existing or New Student Confirmation Screen

1. Add a **Screen** element after the Welcome Screen element and label it as **"Existing or New Student Confirmation Screen"**.

2. Add a **Radio Button** component from the left side panel.
   - **Label:** Are you an Existing Student?
   - **Choice 1:** "Yes"
   - **Choice 2:** "No"

3. Click **Done**.

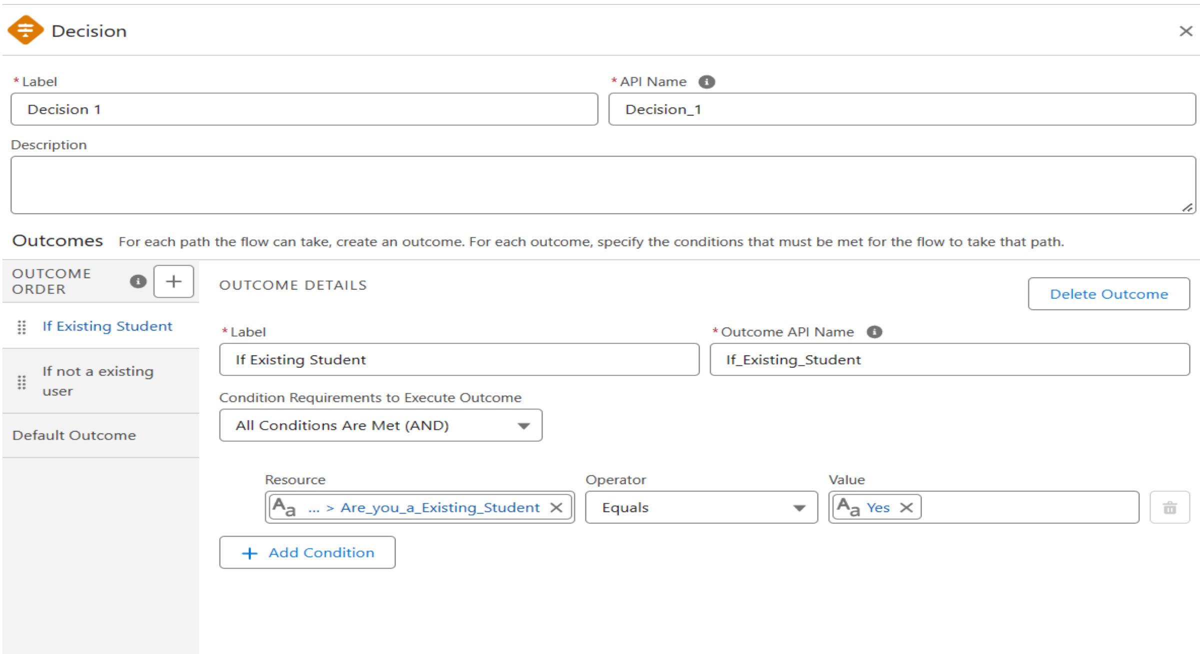


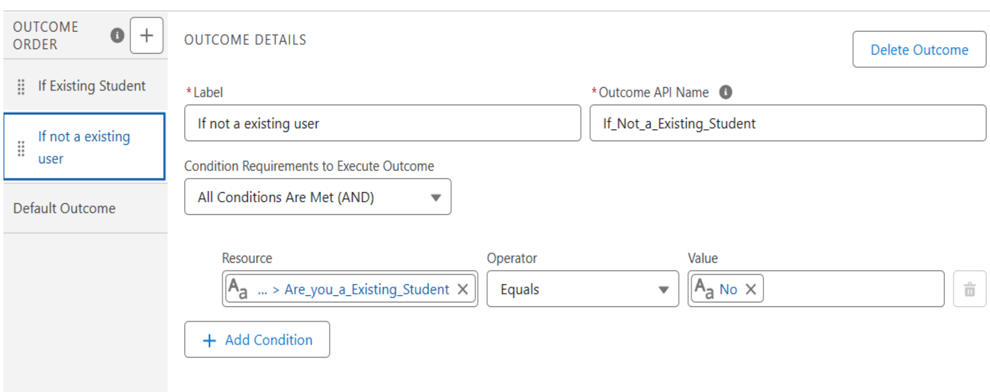


Subtask 3: Add Decision Element

1. Add a **Decision** element after the Existing or New Student Confirmation Screen element and label it as **“Decision 1”**.
2. Create an outcome:
   - **Label:** If Existing Student
   - **Resource:** {!Are_you_a_Existing_Student}
   - **Operator:** Equals
   - **Value:** {!Yes}

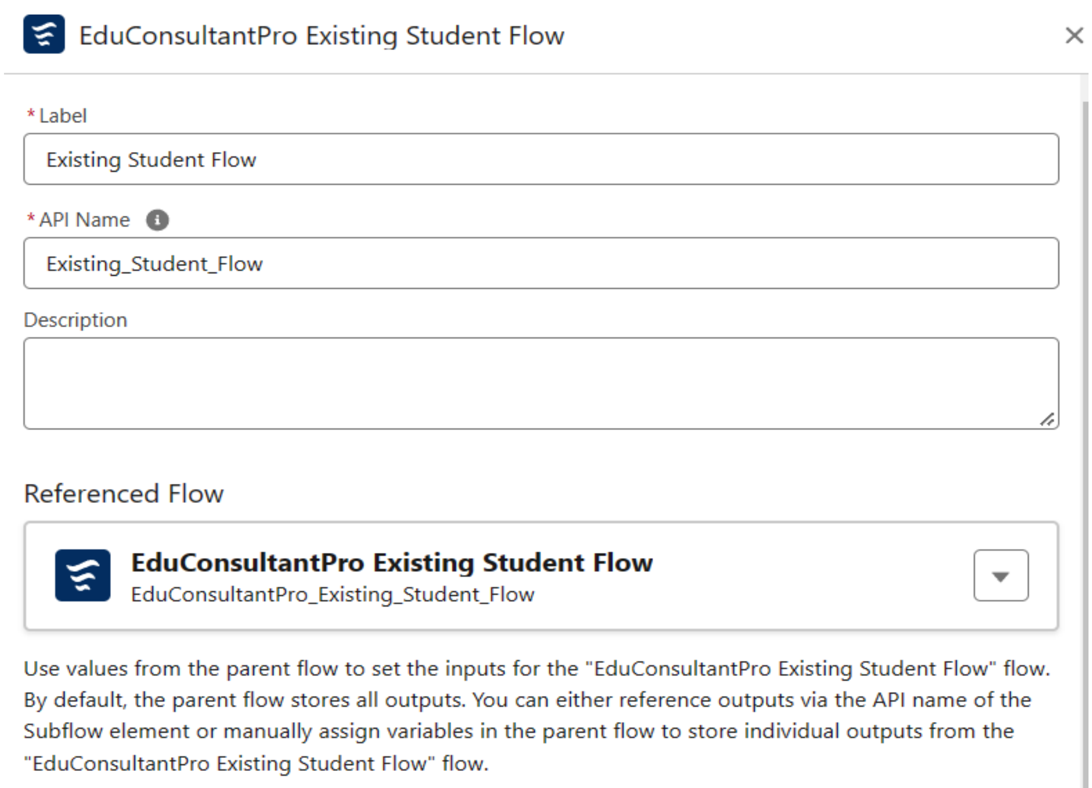
3. Click the “+” icon to add more outcomes for “No” and other cases as required.





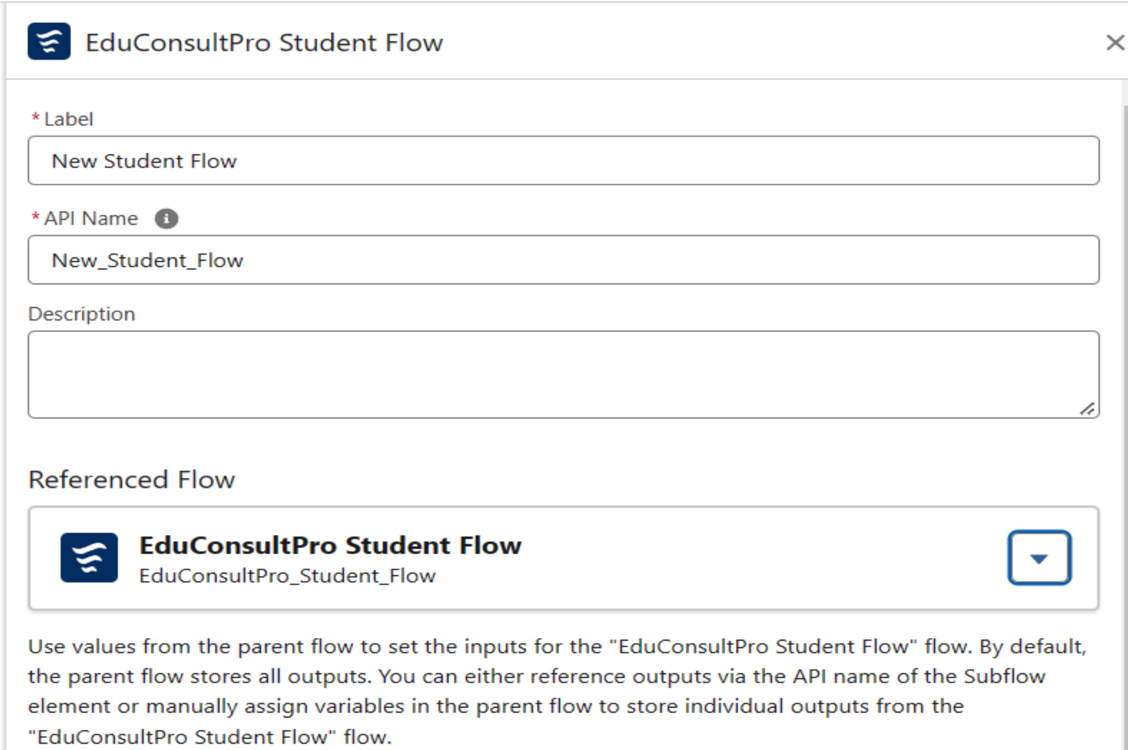
Subtask 4: Add Subflow for Existing Students

1. Add a **Subflow** element after the **Decision 1** element on the **If Existing Student** path.
2. Search for and select **"EduConsultantPro Existing Student Flow"**.
3. Label it as **"Existing Student Flow"**.
4. Click **Done**.

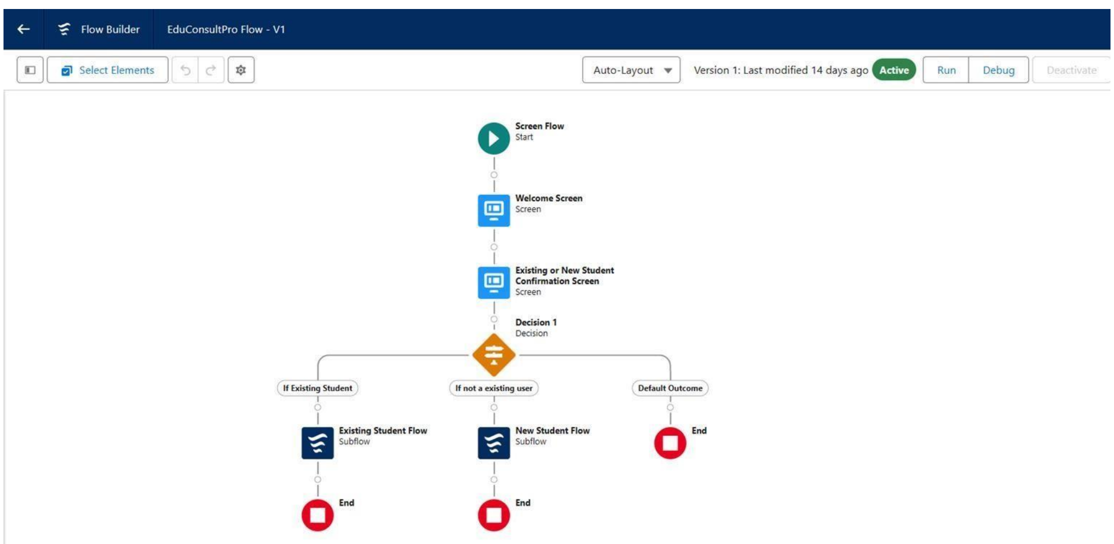


Subtask 5: Add Subflow for New Students

1. Add a **Subflow** element after the **Decision 1** element on the **If Not an Existing Student** path.
2. Search for and select **"EduConsultantPro Student Flow"**.
3. Label it as **"New Student Flow"**.
4. Click **Done**.



5. Save the flow, label it as **"EduConsultantPro Flow"**, and activate it.

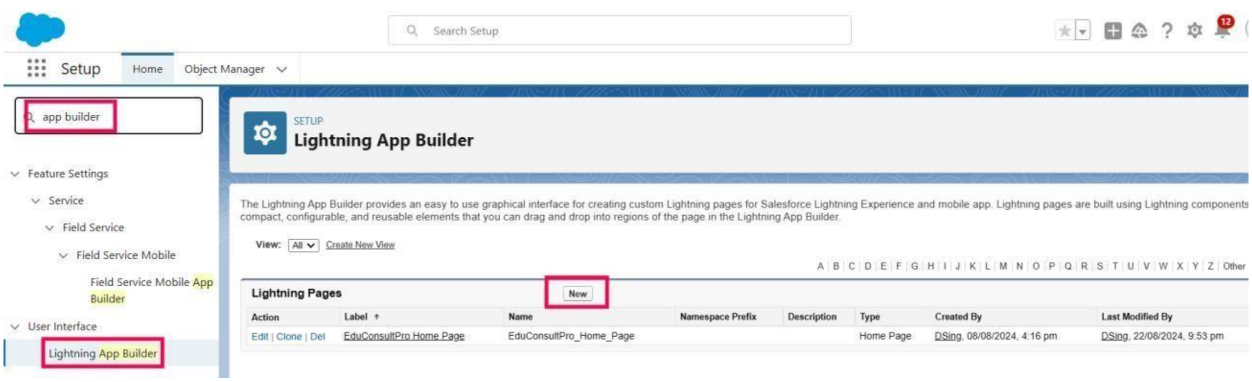


Task 10: Create A Lightning App Page

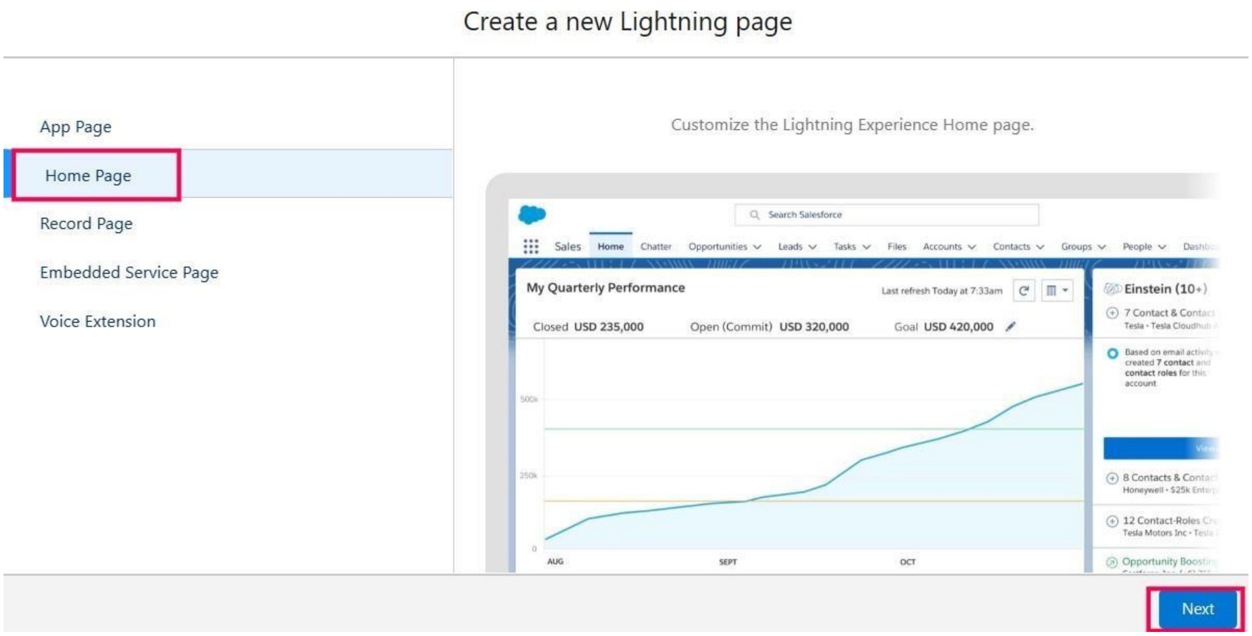
This task involves creating a Lightning App Page and making it available in the application. The new page will feature the "EduConsultantPro Flow" component.

Subtask 1: Create A Lightning App Page

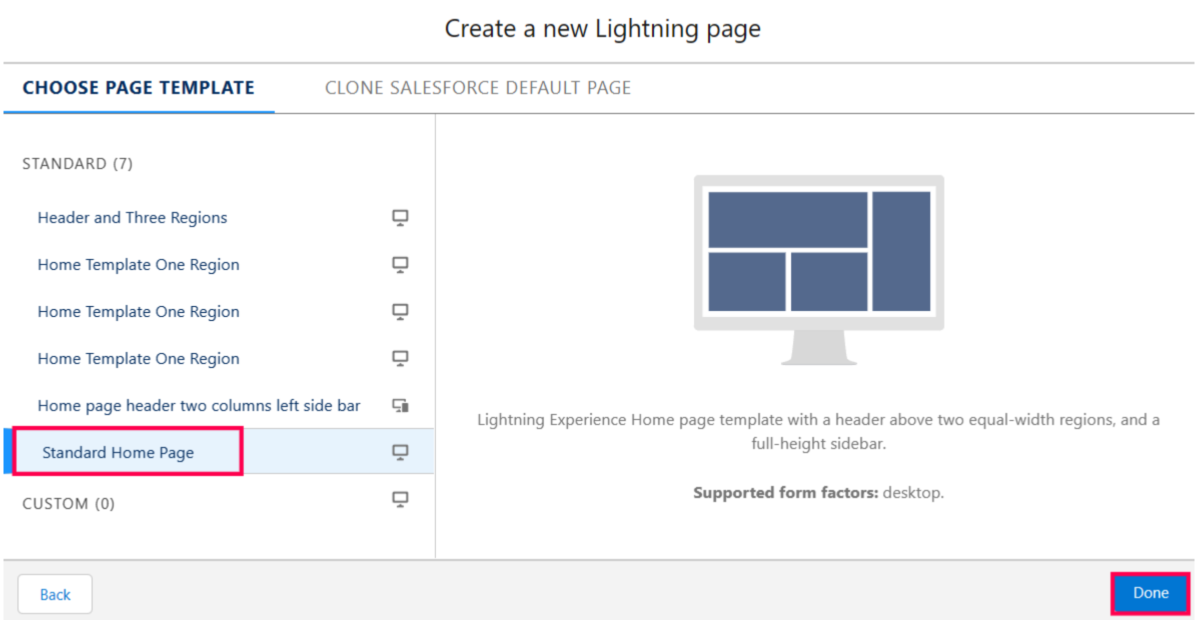
1. **Access Lightning App Builder:**
   - From Setup, enter **App Builder** in the Quick Find box.
   - Click **Lightning App Builder**.



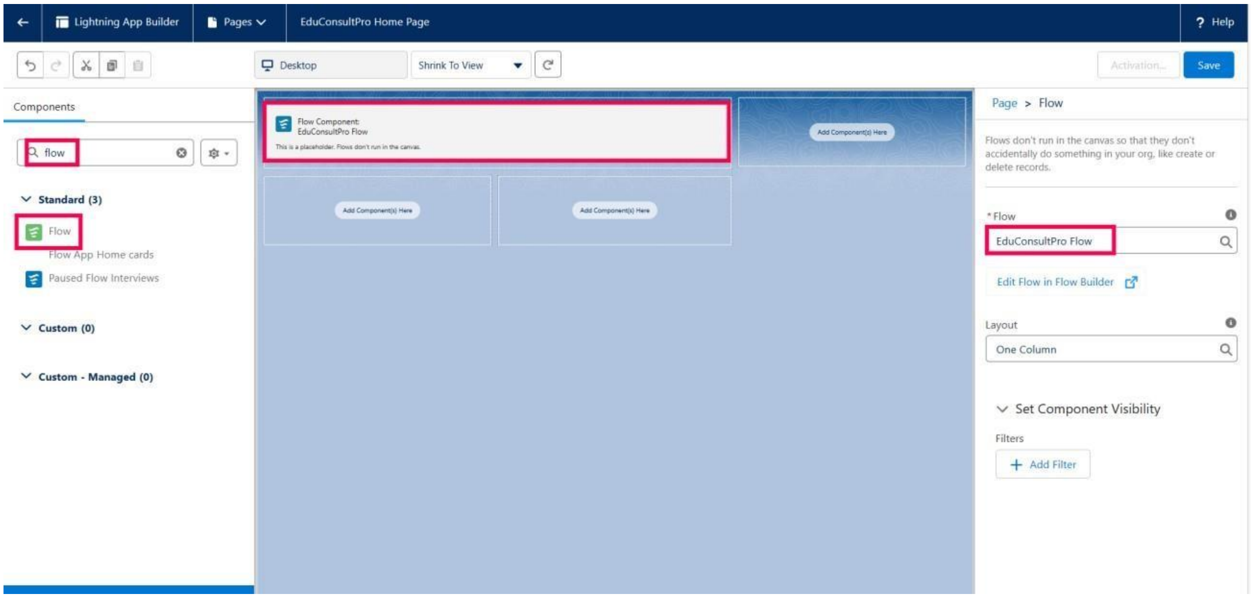
2. **Create a New Home Page:**
   - Click **New**.
   - Select **Home Page** and click **Next**.



3. **Configure the Home Page:**
    - **Name the Page:** Enter **"EduConsultPro Home Page"**.
    - **Select a Template:** Choose the **Standard Home Page** template.
    - Click **Done**.

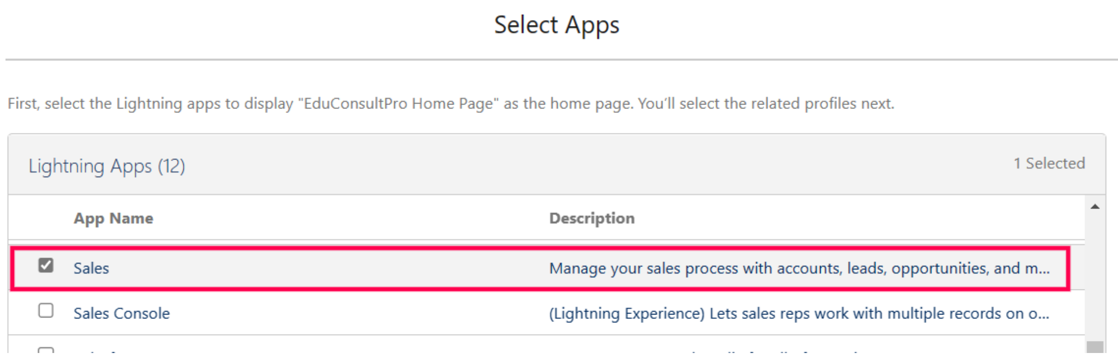


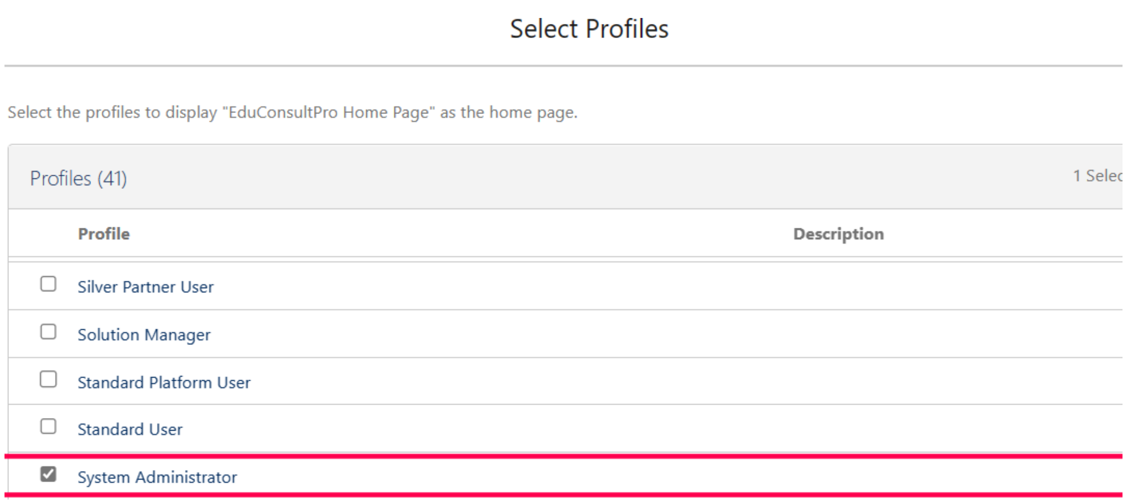
4. **Add the Flow Component:**
   - Drag the **Flow** component to the **top-right** region of the page layout.
   - In the component properties pane, search for and select **"EduConsultantPro Flow"**.

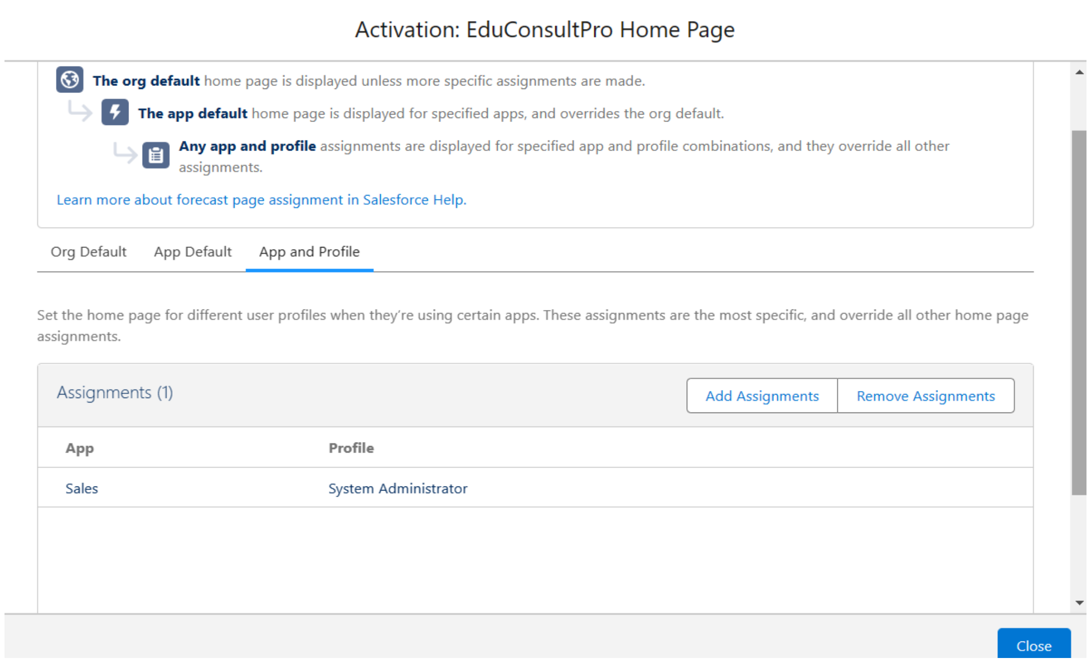


5. **Save and Activate the Page:**
   - Click **Save**.
   - Click **Activate**.

6. **Assign the Page to Apps and Profiles:**
   - Click **App and Profile**.
   - Click **Assign to Apps and Profiles**.
   - **Select the Sales App:** Choose **Sales** and click **Next**.
   - **Assign to Profiles:** Scroll down and select **System Administrator** profile. Click **Next**.
   - **Review and Save:** Review the assignment details and click **Save**.


Select Apps
First, select the Lightning apps to display "EduConsultPro Home Page" as the home page. You'll select the related profiles next.
Lightning Apps (12)
1 Selected
App Name
Description
Sales
Manage your sales process with accounts, leads, opportunities, and m...
Sales Console
(Lightning Experience) Lets sales reps work with multiple records on o...


Select Profiles
Select the profiles to display "EduConsultPro Home Page" as the home page.
Profiles (41)
Profile
Description
Silver Partner User
Solution Manager
Standard Platform User
Standard User
System Administrator


Activation: EduConsultPro Home Page
The org default home page is displayed unless more specific assignments are made.
The app default home page is displayed for specified apps, and overrides the org default.
Any app and profile assignments are displayed for specified app and profile combinations, and they override all other assignments.
Learn more about forecast page assignment in Salesforce Help.
Org Default
App Default
App and Profile
Set the home page for different user profiles when they're using certain apps. These assignments are the most specific, and override all other home page assignments.
Assignments (1)
Add Assignments
Remove Assignments
App
Profile
Sales
System Administrator
Close