A CRM Application to Manage the Services offered by an Institution

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Report: Institution Service Management CRM System

1. Project Description :

The Salesforce CRM implementation for automobile sales streamlines the entire sales process, enhancing efficiency and customer satisfaction. Through this system, sales teams can manage leads, track customer interactions, and automate follow-ups. It enables comprehensive customer profiling, allowing for personalized marketing strategies and targeted campaigns. The platform facilitates inventory management, ensuring real-time updates on available vehicles and their specifications. Integration with marketing tools enables seamless communication and lead nurturing. Additionally, the system provides insightful analytics, empowering decision-making by identifying sales trends and forecasting demand. Overall, the Salesforce CRM for automobile sales optimizes operations, fosters customer relationships, and drives revenue growth within the automotive industry.

2. Short Description :

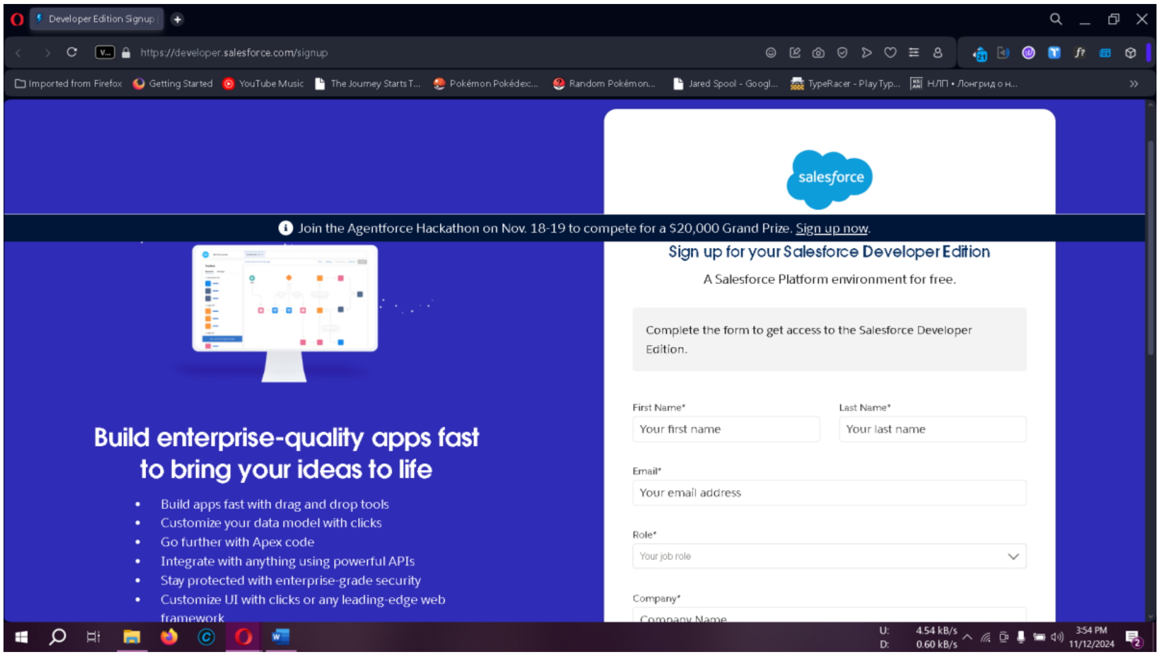
This project is a Salesforce-based system designed to streamline student admissions, consulting requests, and immigration case management for an educational institute. Prospective students can submit applications, request consulting services, and initiate immigration cases through the institute's website. All submissions are recorded in Salesforce, triggering automated email notifications and allowing staff to track, review, and manage each case. Admissions staff can analyze application data, consultants can schedule and manage appointments, and immigration agents can process cases efficiently with status tracking and document collaboration tools integrated into the CRM.

Milestone 1-salesforce

3. Developer Account Creation

To start working with Salesforce CRM, a developer account is essential. Follow these steps to create an account:

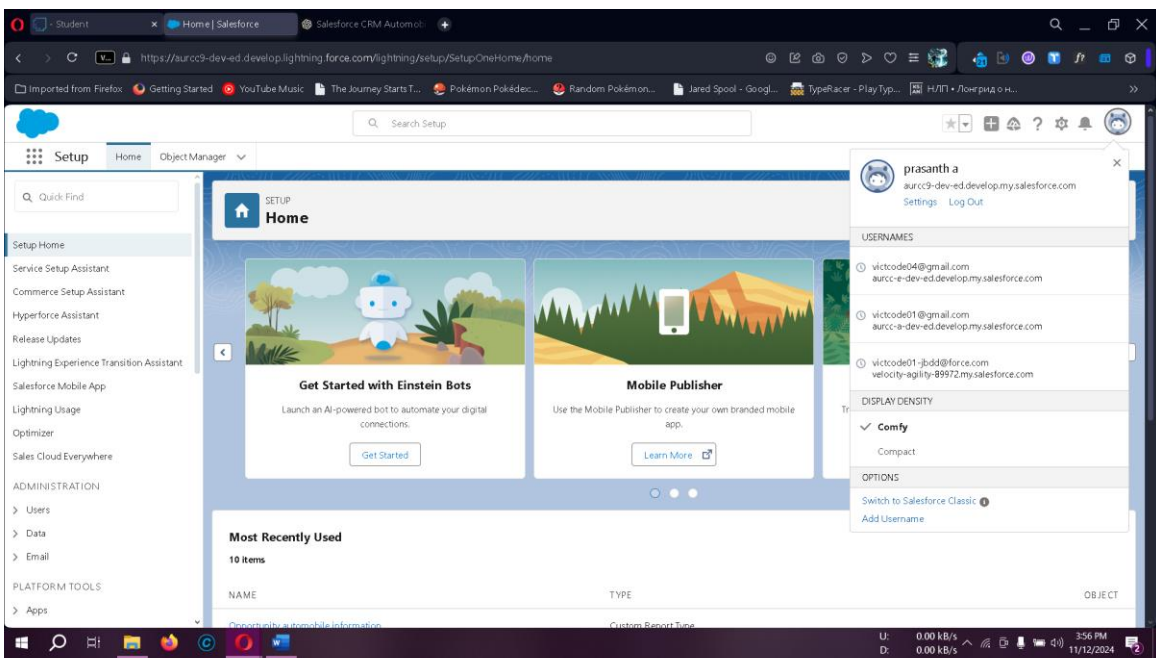
1. **Sign-Up Process**
   - Go to [Salesforce Developer Sign-Up](#).
   - Enter your **First and Last Name**, **Email**, and set **Role** as "Developer."
   - Input your **Company** (College Name), **Country** (India), **Postal Code**, and **Username** (formatted as username@organization.com).
   - Click **Sign Me Up** after filling out the form.



2. **Account Activation**

○ Open the inbox of the email used for registration, locate the Salesforce verification email, and click **Verify Account**.

○ Set a password, choose a security question, and log into your Salesforce account to access the setup page.



3. Objects in Salesforce

Salesforce objects function as database tables for storing and organizing data relevant to the organization.

- **Standard Objects**: Provided by Salesforce by default (e.g., Accounts, Contacts).
- **Custom Objects**: User-defined objects to store unique organizational data.

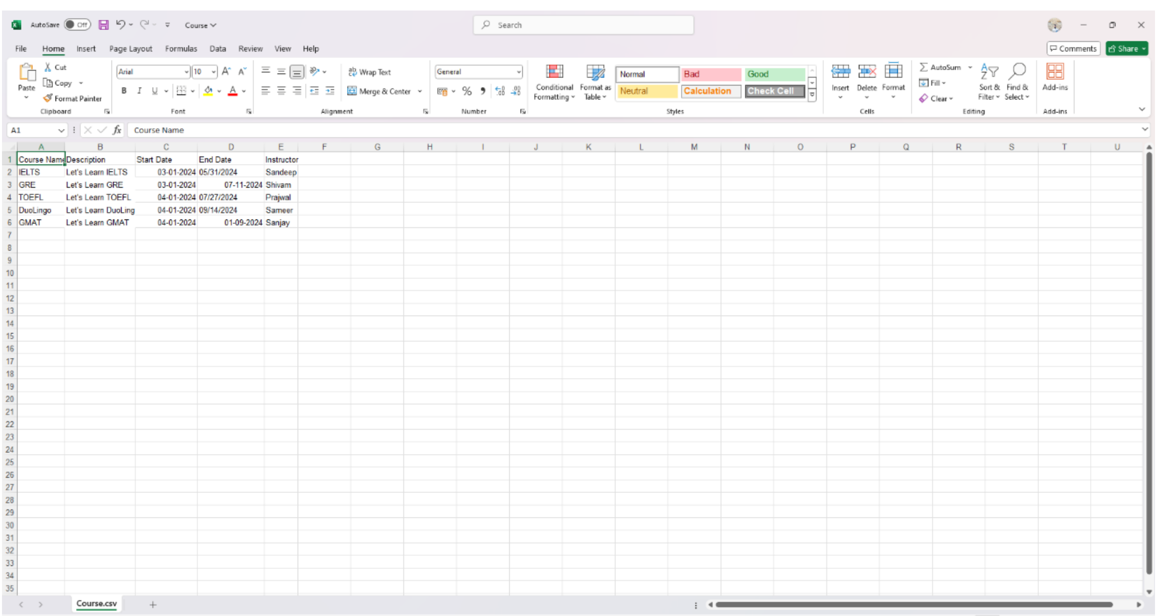
Use Case

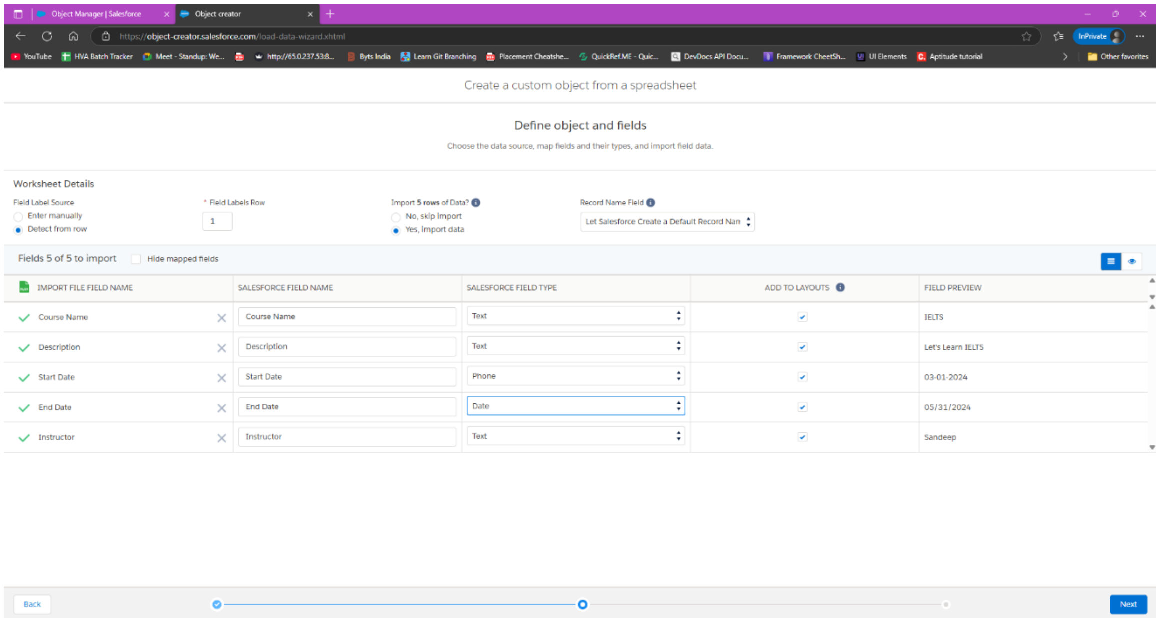
Creating custom objects such as Automobile Information and Invoice enables efficient data handling, process automation, and tailored reporting for automobile sales.

4. Creating Objects

4.1 Creating Course Object

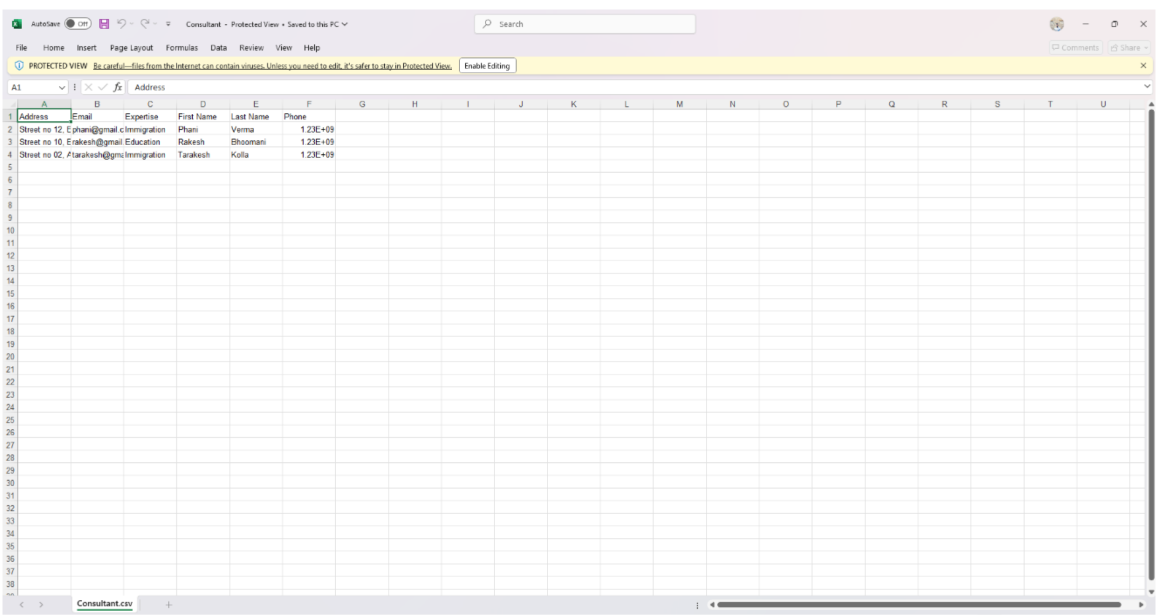
1. Download and open **course.xlsx**.
2. Log into Salesforce, navigate to **Setup > Object Manager**.
3. Select **Custom Object from Spreadsheet**, login if prompted, upload the XLSX file, and map fields with the correct data types.
4. Follow prompts and finish to complete object creation.

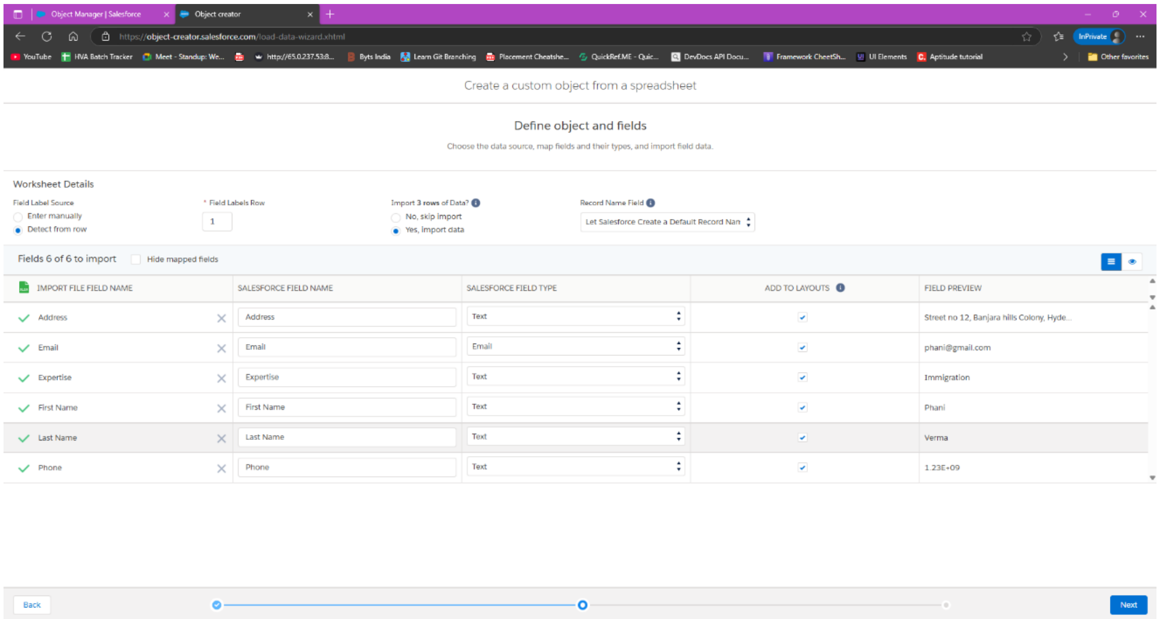




4.2 Consultant Object

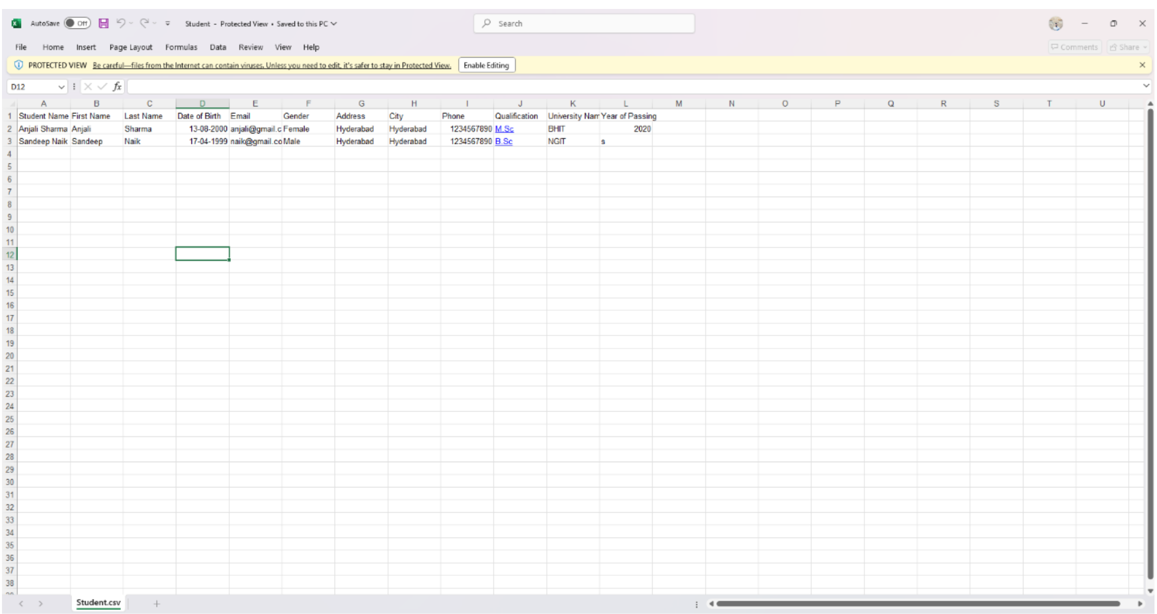
Repeat the steps above with the **Consultant XLSX** file, ensuring proper field mapping.

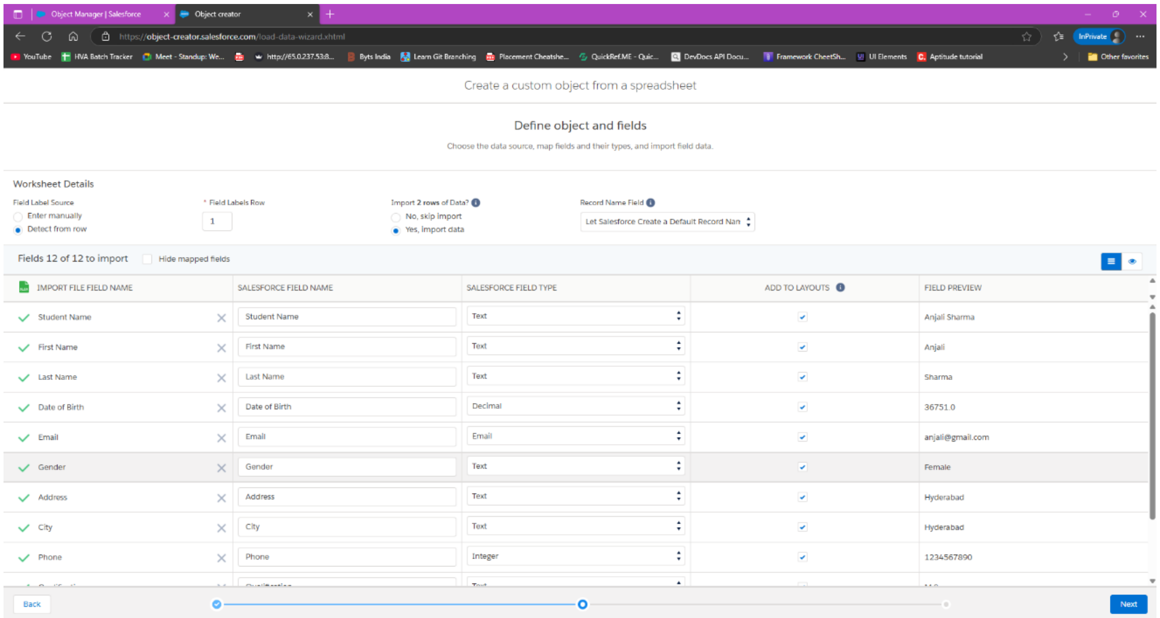




4.3 Student Object

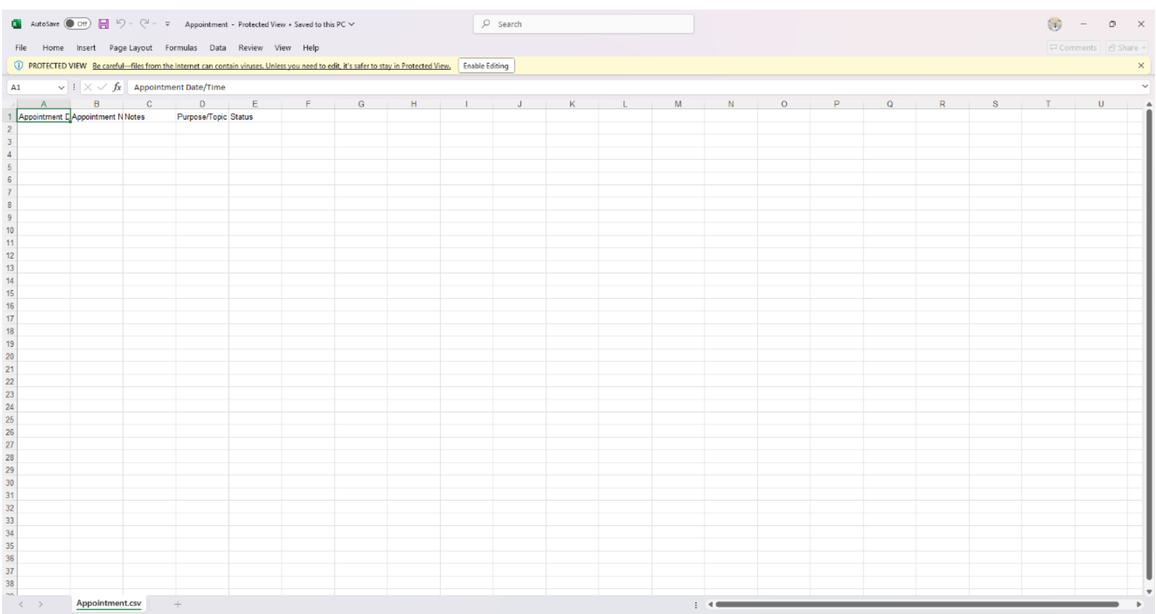
Repeat the steps above with the **Student XLSX** file, ensuring proper field mapping.

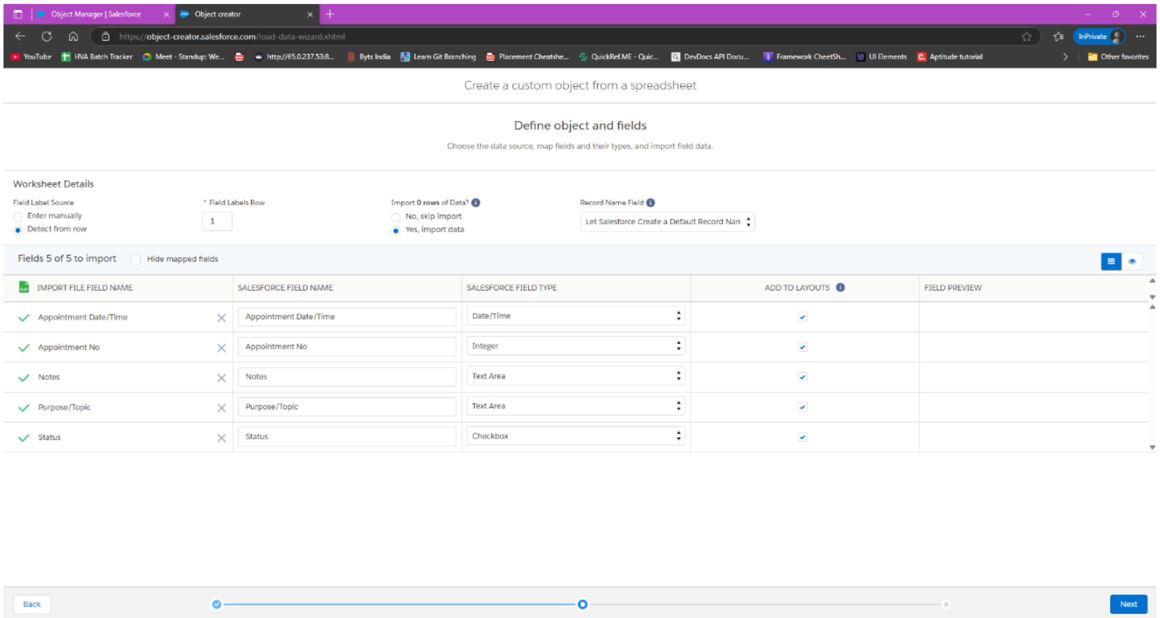




4.4 Appointment Object

Repeat the steps above with the **Appointment XLSX** file, ensuring proper field mapping.





5. Creating Relationship among the objects

Lookup between Appointment and Student:

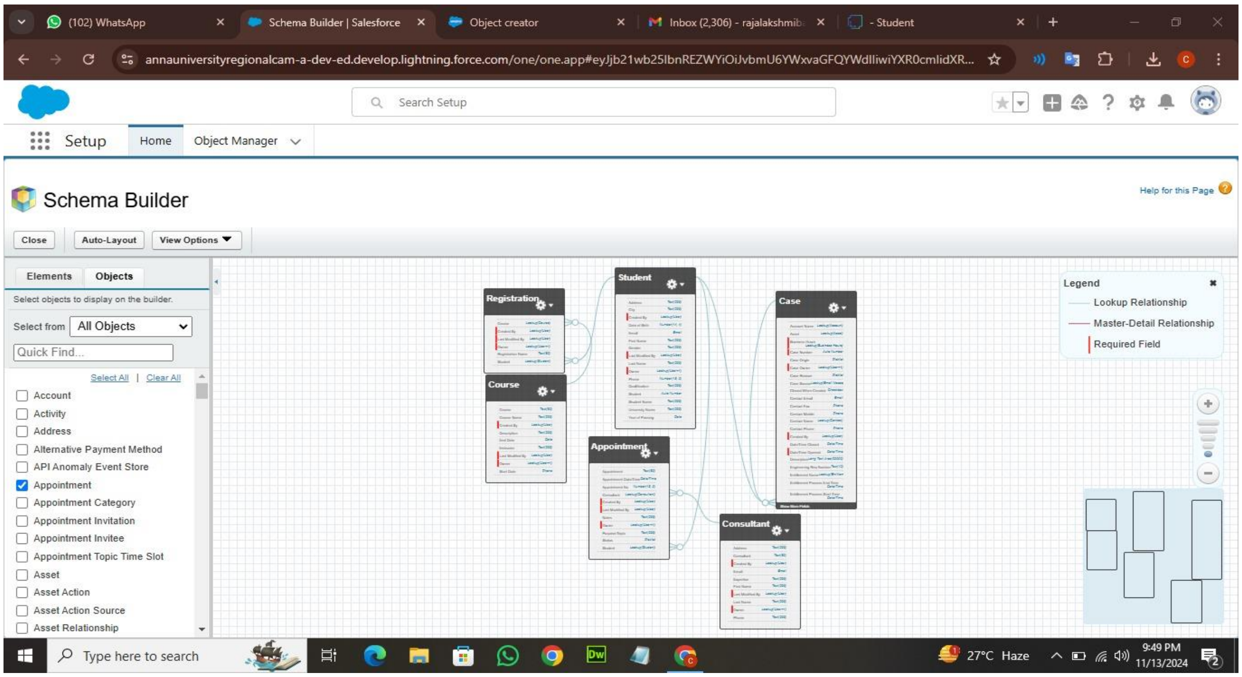
1. Go to **Object Manager** → **Appointment**.
2. Click **Fields & Relationships** → **New**.
3. Select **Lookup Relationship** and click **Next**.
4. Select **Student** as the related object, and click **Next**.
5. Label the field (e.g., "Student").
6. Set any required field-level security and page layouts.
7. Click **Save**.

Lookup between Appointment and Consultant:

1. Go to **Object Manager** → **Appointment**.
2. Click **Fields & Relationships** → **New**.
3. Select **Lookup Relationship**.
4. Select **Consultant** as the related object and continue with the setup steps as before.

Lookup between Student and Case (to store Student Queries):

1. Go to **Object Manager → Student**.
2. Click **Fields & Relationships → New**.
3. Select **Lookup Relationship**.
4. Select **Case** as the related object and complete the setup steps.



6. Creating a ScreenFlow for Student Admission Application process.

6.1 Add Screen Element

Step 1: Go to Flow Builder

- Log into your **Salesforce** account.
- Go to **Setup** by clicking on the gear icon at the top right of the page.
- In the **Quick Find** box, type **Flow Builder**.
- Click on **Flows**.

Step 2: Create a New Flow

- Click **New Flow**.
- Select **Screen Flow** and click **Create**.

Step 3: Add a Screen Element

- In the Flow Builder, you'll see a plus sign **(+)**. Click on it and select **Screen**.
- In the **Screen Properties** pane on the right, for **Label**, enter "Student Info."
- Click **Done**.

Step 4: Create a Resource for the Student Record

- In the Screen component setup, click on **Fields** to access the components related to field inputs.
- In the **Input** section, click **Record** variable (this will be used to hold data for a student record).
- In the **Create New Resource** dialog:
  1. For **Resource Type**, select **Variable**.
  2. For **API Name**, enter **StudentRecordRes**.
  3. Set **Data Type** to **Record**.
  4. For **Object**, select the **Student** object (assuming it's a custom object you've already created or exists in your org).
- Click **Done**.

Step 5: Add Fields to the Screen

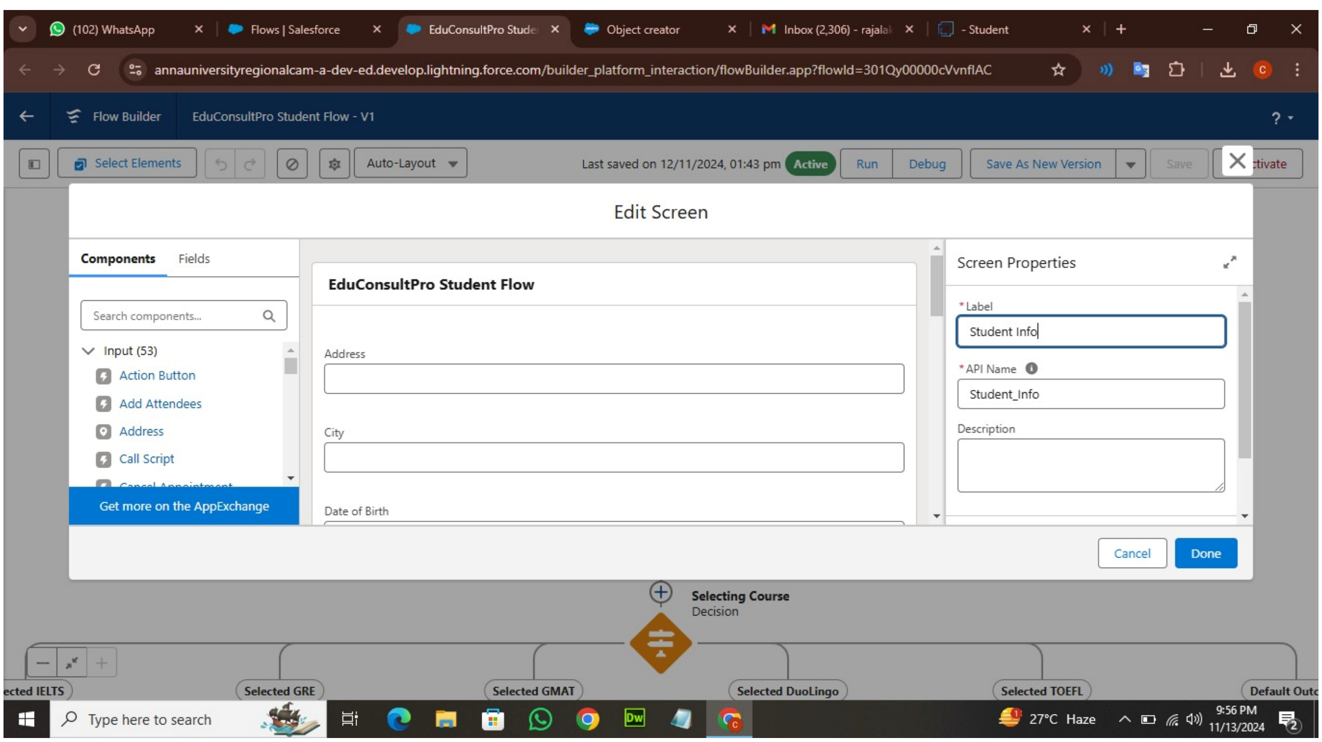
- Now, within the **Screen** element, drag each required field (like **Name**, **Age**, **Grade**, etc.) from the **Fields** section into the Screen canvas.
    1. For each field, make sure to map it to the **StudentRecordRes** resource so it pulls data from and saves data to the **Student** record.
- Customize the **Field Labels** and other options as needed.

Step 6: Configure Screen Properties (Optional)

- Adjust the screen properties for better flow and user experience. For example, you can:
    1. Set the screen to be **Required**.
    2. Adjust the layout or add a **Header** and **Footer**.

Step 7: Save and Activate the Flow

- After you've added all required fields and adjusted the screen properties, click **Done**.
- Click **Save** and give your flow a name (e.g., "Student Information Flow").
- Click **Activate** to make the flow available.



6.2 Create Student Record using Create Element

Step 1: Add a Create Element

- In the Flow Builder, click on the plus sign (+) below the Student Info screen element.
- Select Create Records from the list.

Step 2: Configure the Create Element

- In the Create Records configuration pane on the right side, for Label, enter Create Student Record.
- Set API Name to Create_Student_Record (this is usually auto-generated, but you can adjust it if needed).

Step 3: Set the Record Creation Options

- Under How Many Records to Create, select One.
- Under How to Set the Record Fields, select Use all values from a record.

Step 4: Select the Record Variable Resource

- Under **Create a record from these values**, select the record variable resource **StudentRecordRes**.

Step 5: Finish the Element Configuration

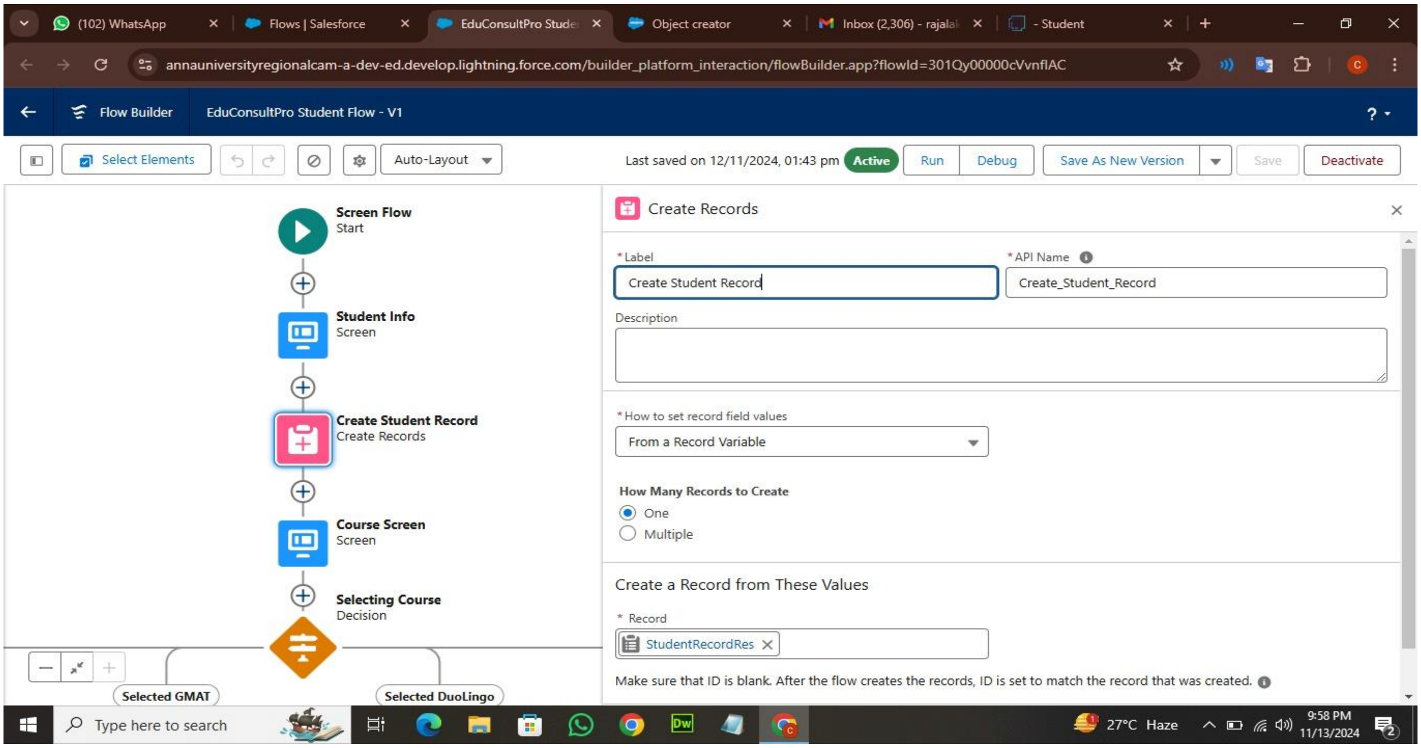
- Click Done to save the Create Student Record element.

Step 6: Connect the Elements

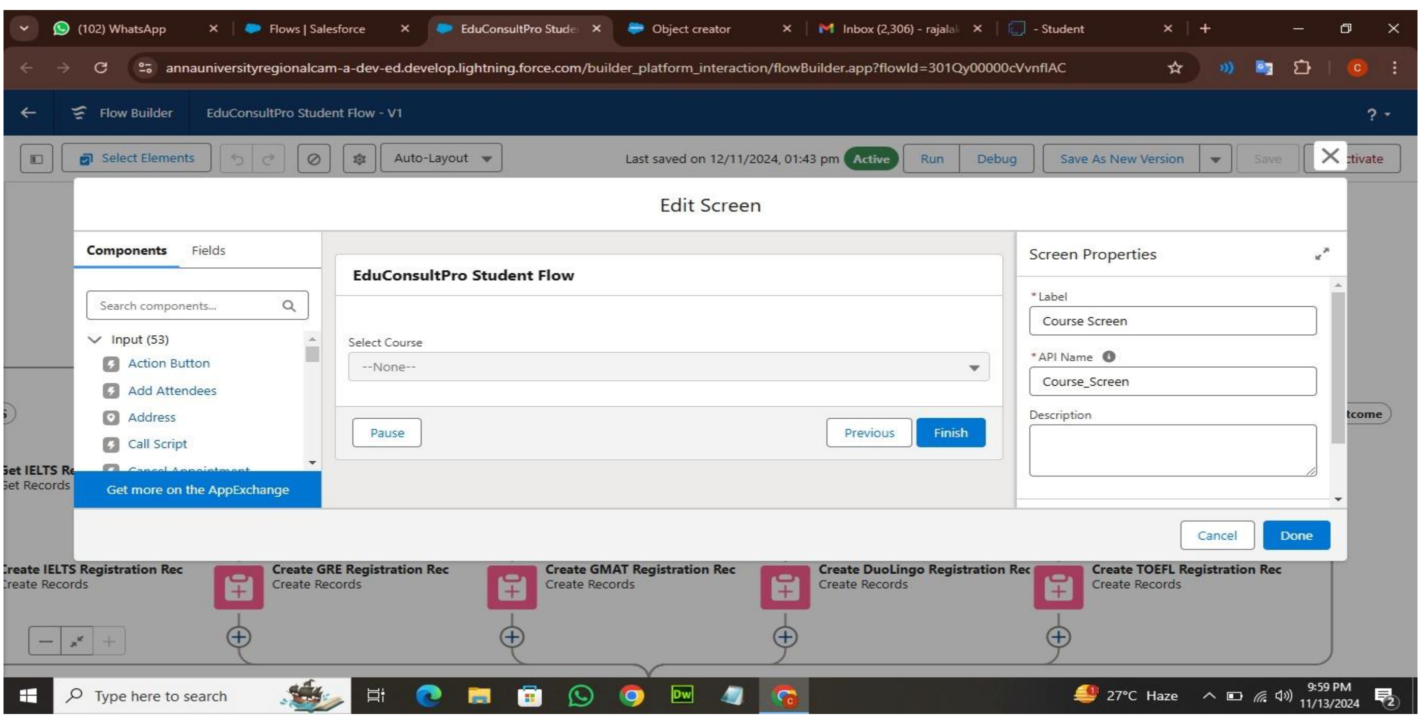
- In the Flow Builder, ensure that the Student Info screen element is connected to the Create Student Record element.
    1. You should see an arrow pointing from Student Info to Create Student Record.

Step 7: Save and Activate the Flow

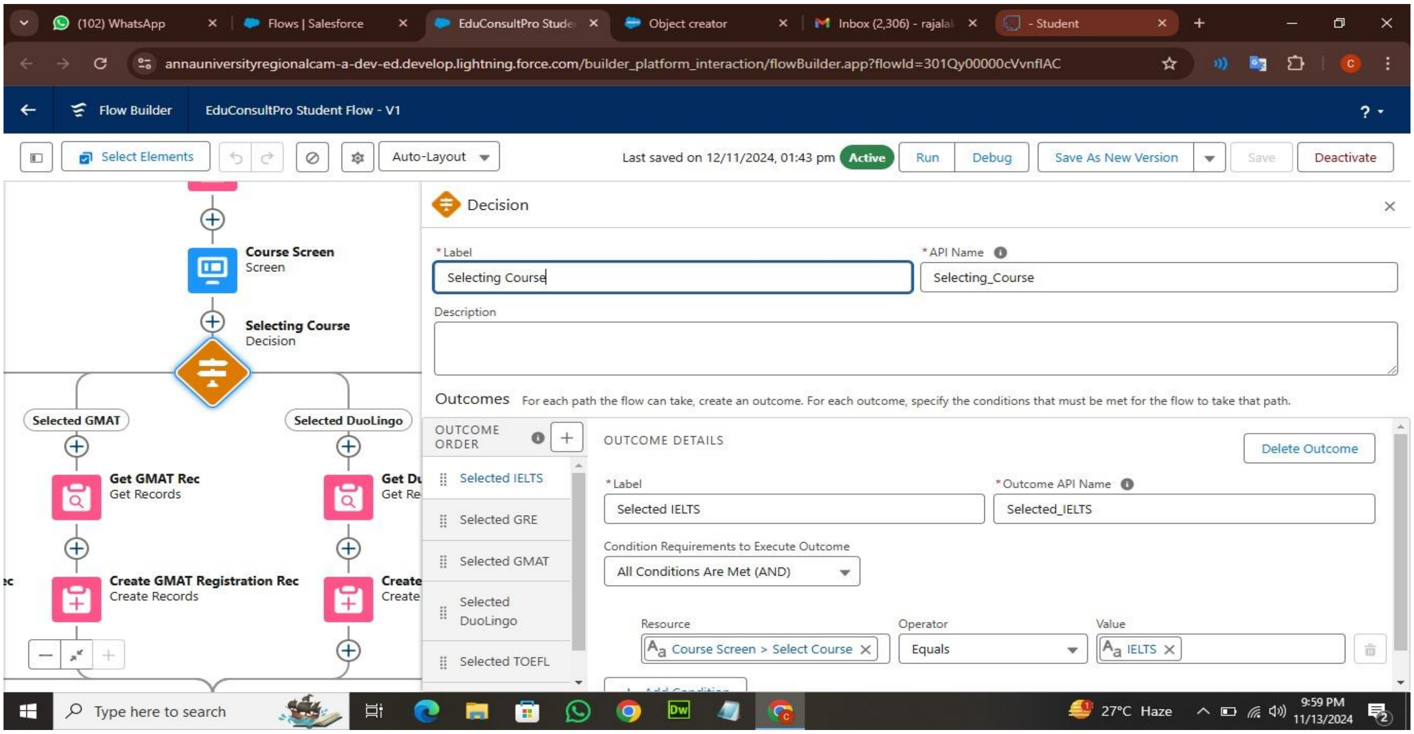
- Click Save to save your progress.
- If you're ready to deploy this Flow, click Activate.



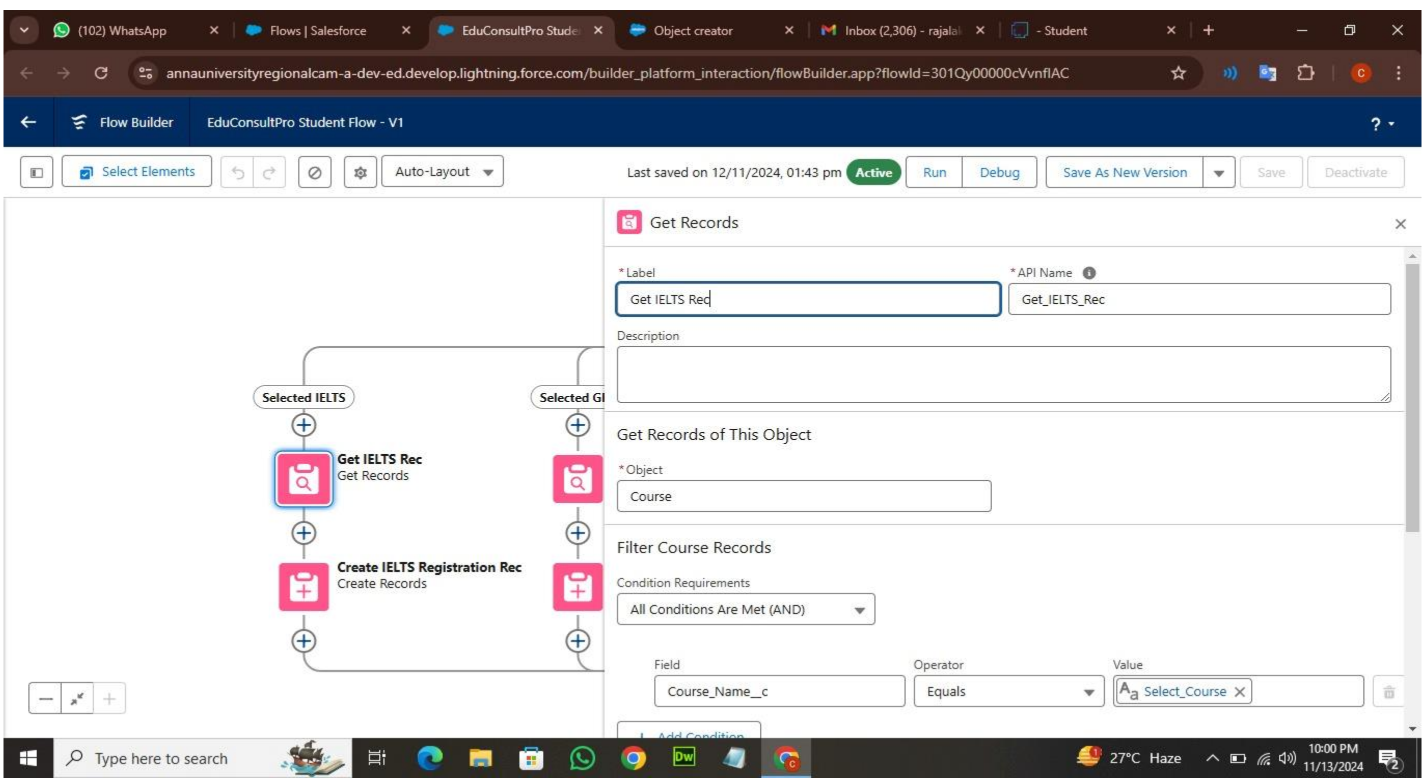
6.3 Add Screen Element



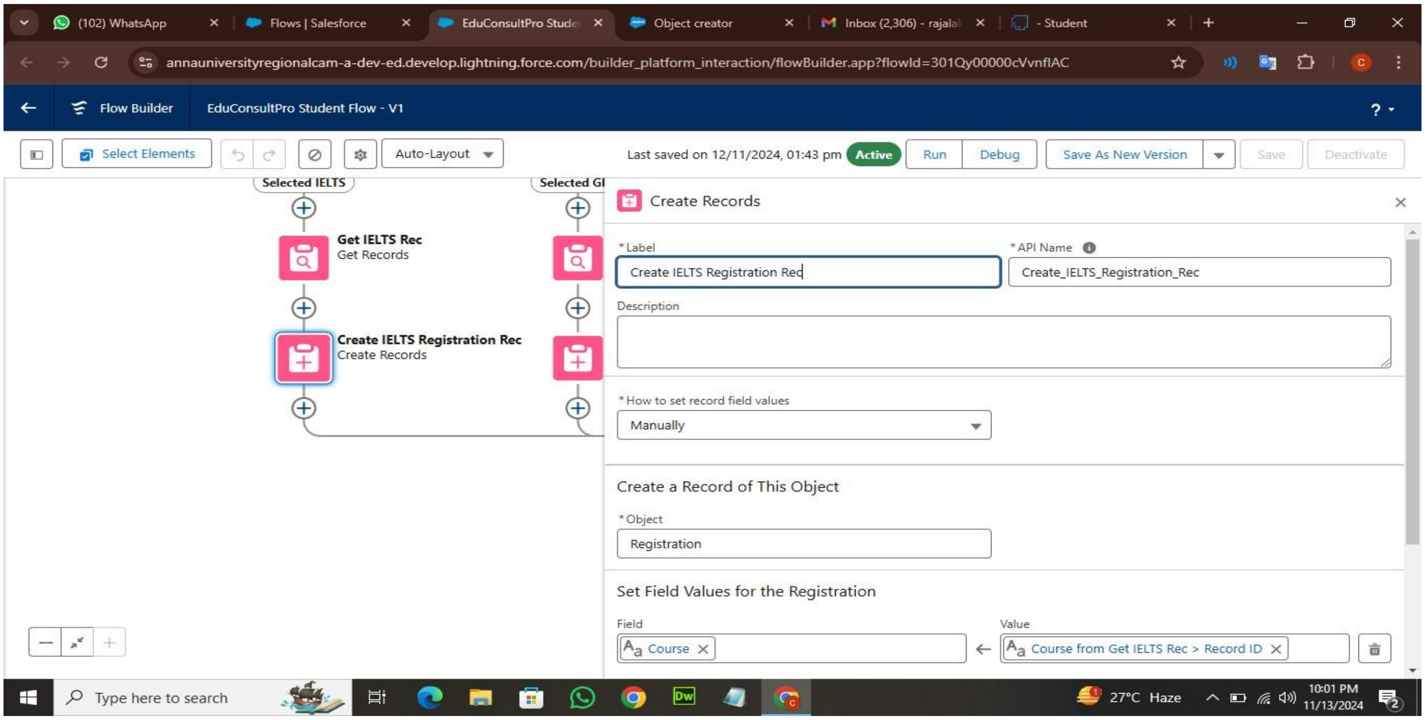
6.4 Adding Decision Element



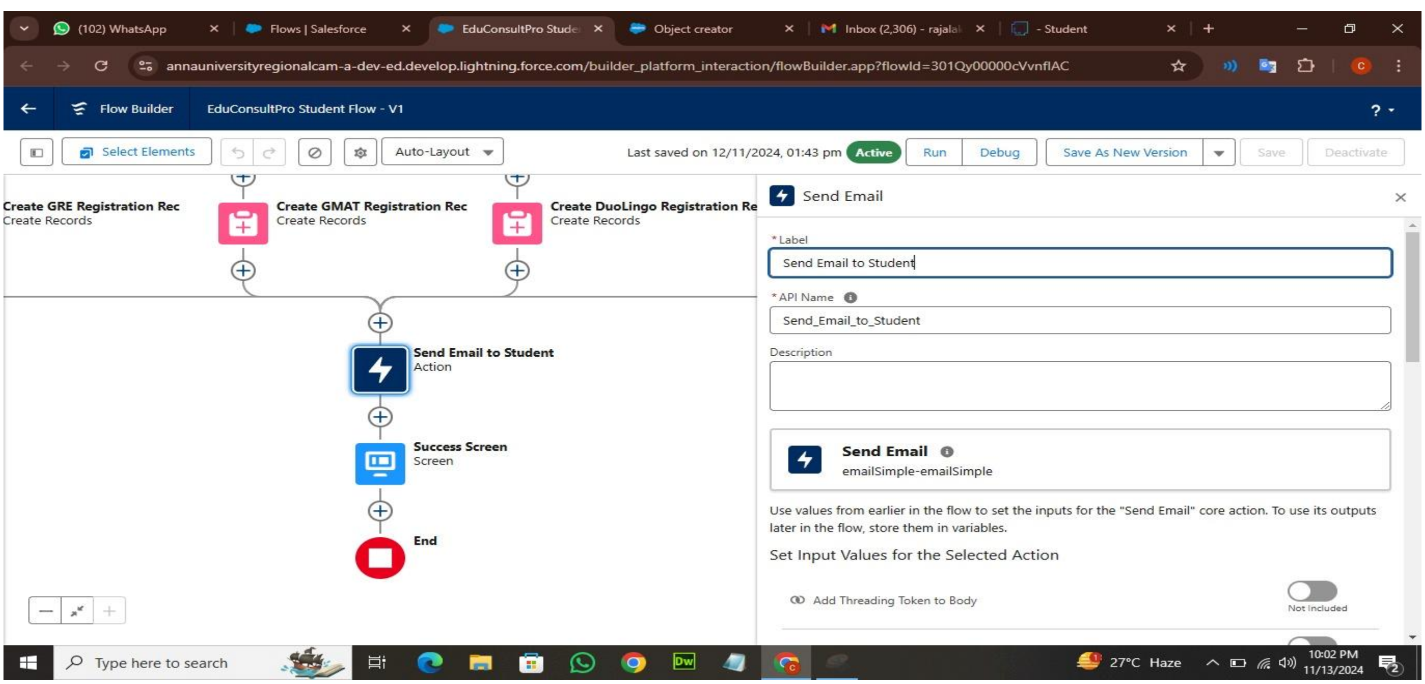
6.5 Adding GET Record Element



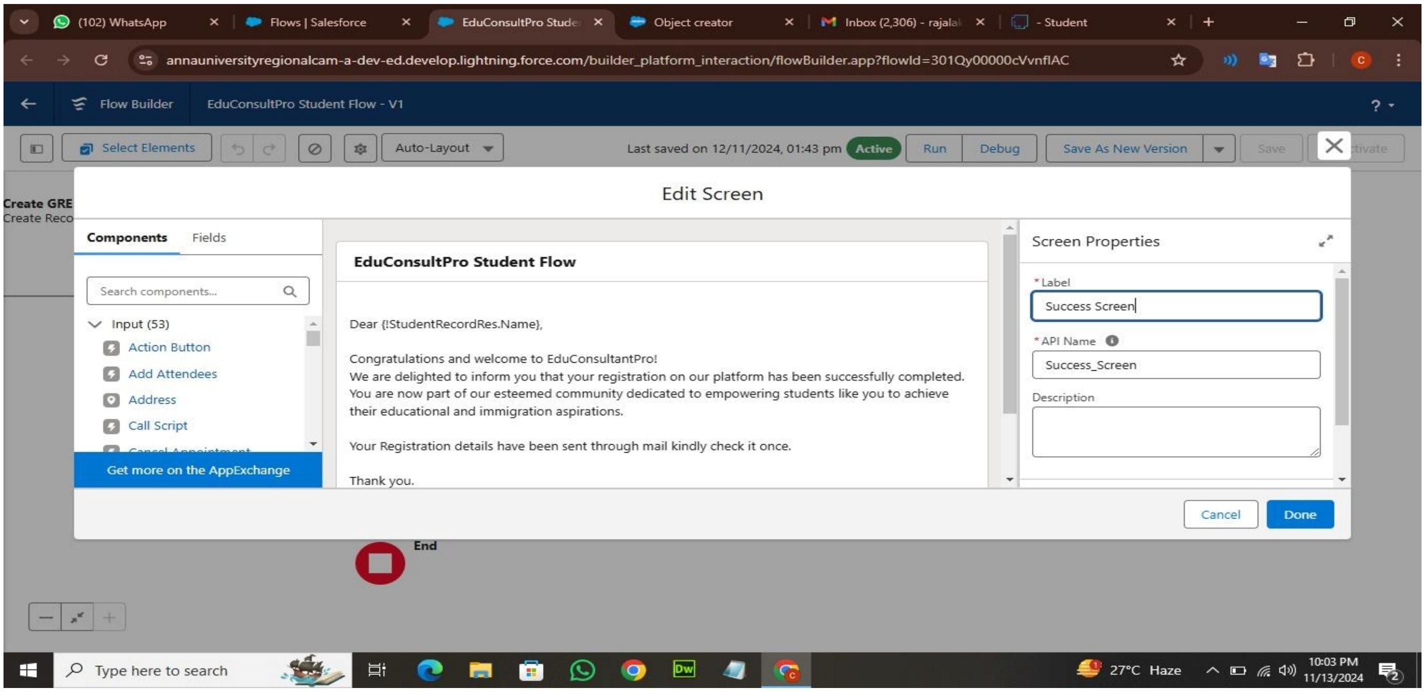
6.6 Creating Registration Record using Create Records Element



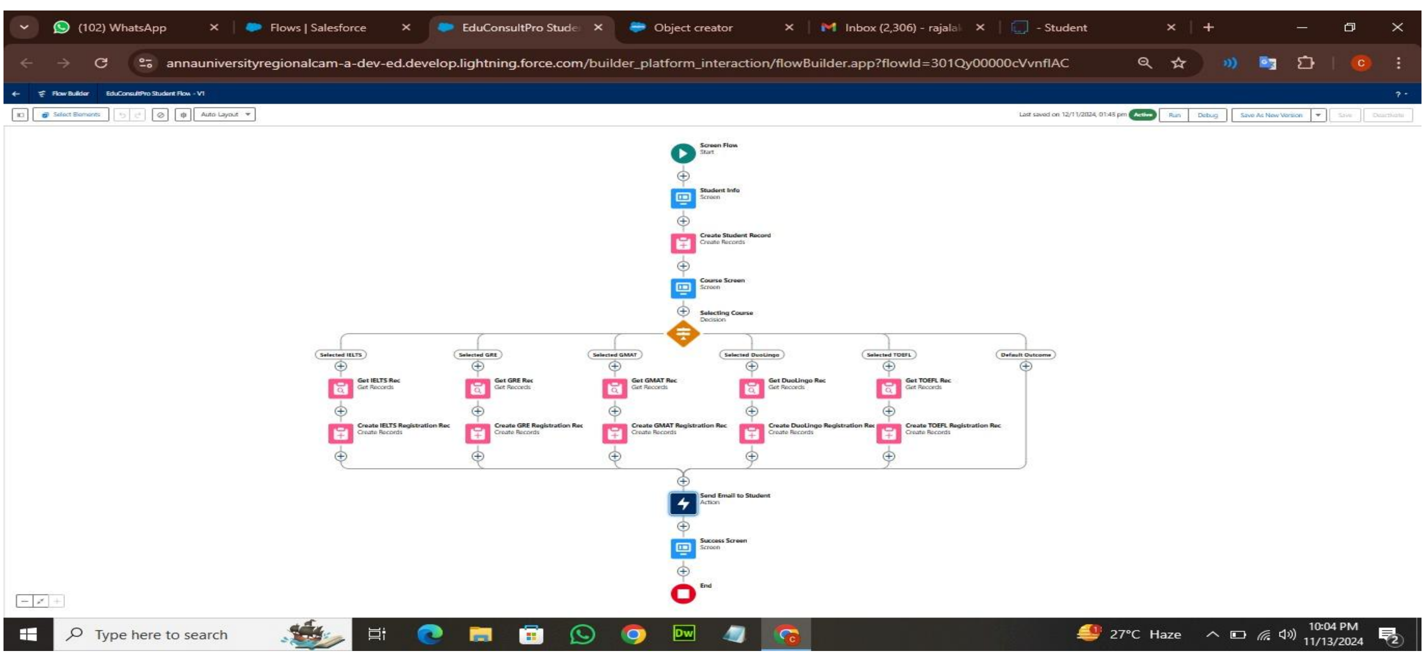
6.7 Adding an Action Element



6.8 Adding Screen Element



6.9 Final ScreenFlow for Student Admission Application process



7. Creating Users

Step 1: Go to Users Setup

- Log in to **Salesforce** and click on the **Setup** gear icon at the top right corner.
- In the **Quick Find** box, type **Users**.
- Under **Administration** > **Users**, click on **Users**.

Step 2: Create a New User

- On the **Users** page, click on **New User**.

Step 3: Fill in the Required Fields

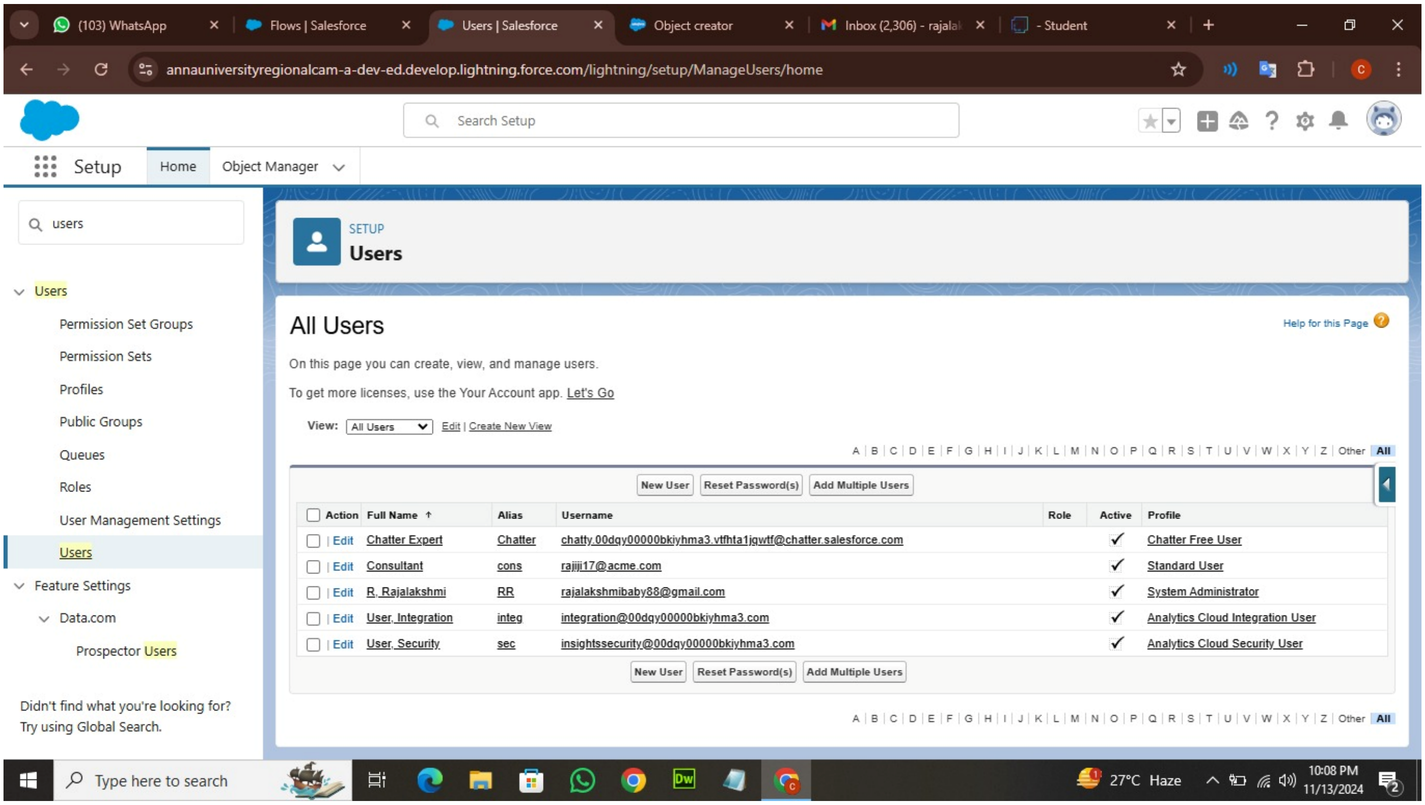
- **Last Name**: Enter **Consultant**.
- **Alias**: This will auto-populate based on the last name, but you can adjust it if needed.
- **Email**: Enter the user's email address. This email must be valid, as the user will receive their login information here.
- **Username**: Enter a unique username (usually the email is used as the username). Salesforce usernames must be in email format, even if they do not have to be a real email address.
- **Nickname**: This field will auto-populate but can be customized.
- **Role**: You may leave this as **None** if you don't need a specific role.
- **User License**: Select **Salesforce Platform** from the dropdown.
- **Profile**: Select **Standard Platform User**.

Step 4: Complete Other Mandatory Fields

- **Time Zone**: Select the correct time zone for the user.
- **Locale**: Set the appropriate locale, e.g., **English (United States)**.
- **Language**: Choose the user's preferred language.
- **Email Encoding**: This will usually default to **UTF-8**.

Step 5: Save the New User

- Review the information to ensure accuracy.
- Click **Save**.



8. Creating an Approval Process for Property Object

8.1 Creating an Email Template

Step 1: Enable Lightning Email Templates

1. Go to **Setup** in Salesforce by clicking the gear icon at the top right.
2. In the **Quick Find** box, type **Templates**.
3. Select **Lightning Email Templates**.
4. Toggle the option to **On** if it isn't enabled already.

Step 2: Create a Folder for Email Templates

1. Go to the **App Launcher** (the grid icon) and search for **Email Templates**.
2. Open **Email Templates**.
3. In the **Email Templates** page, click on the **Folders** icon.
4. Select **New Folder**.
5. Enter a name for your folder (e.g., **Appointment Templates**), set visibility as needed, and click **Save**.

Step 3: Create the Submission Template Email

1. In the Email Templates section, click New Email Template.
2. Fill in the template details:
   - Template Name: Enter Submission Template.
   - Folder: Select the folder you just created (e.g., Appointment Templates).
   - Email Subject: Enter a subject (e.g., Appointment Confirmation).
3. In the HTML Body section, paste the following template content:

Dear {{{Appointment__c.Student_Name__c}}},

I hope this email finds you well. I am writing to confirm the details of our upcoming appointment scheduled for {{{Appointment__c.Appointment_DateTime__c}}} regarding {{{Appointment__c.PurposeTopic__c}}}.

Appointment Details:
- Appointment No: {{{Appointment__c.Name}}},
- Student Name: {{{Appointment__c.Student_Name__c}}},
- Consultant Name: {{{Appointment__c.Consultant__c}}},
- Date & Time: {{{Appointment__c.Appointment_DateTime__c}}},
- Purpose: {{{Appointment__c.PurposeTopic__c}}}

I want to assure you that I am looking forward to our meeting and am fully prepared to address any questions or concerns you may have regarding {{{Appointment__c.PurposeTopic__c}}}. Your success and satisfaction are my top priorities, and I am committed to providing you with the guidance and support you need.

If you have any specific topics or questions you would like to discuss during our appointment, please feel free to share them with me in advance. This will help ensure that our time together is as productive and beneficial as possible.

If for any reason you need to reschedule or cancel our appointment, please notify me at your earliest convenience so that we can make alternative arrangements.

Once again, thank you for choosing to work with me on this matter. I am confident that our collaboration will lead to positive outcomes and progress toward your goals.

If you have any questions or require further information before our scheduled appointment, please don't hesitate to reach out to me.

Looking forward to our meeting.

Best regards,
{{{Recipient.Name}}},
EduConsultantPro

Step 4: Create the Approval Template

1. Click **New Email Template** again.
2. Enter the following details:
   - **Template Name**: **Approval Template**
   - **Folder**: Select **Appointment Templates** (or the folder you created).
   - **Email Subject**: Enter **Appointment Request Approved**.
3. In the **HTML Body**, enter the following text:

Dear {{{Appointment__c.Student_Name__c}}},

We are pleased to inform you that your appointment request has been approved for {{{Appointment__c.Appointment_DateTime__c}}} regarding {{{Appointment__c.PurposeTopic__c}}}.

Appointment Details:
- Appointment No: {{{Appointment__c.Name}}},
- Student Name: {{{Appointment__c.Student_Name__c}}},
- Consultant Name: {{{Appointment__c.Consultant__c}}},
- Date & Time: {{{Appointment__c.Appointment_DateTime__c}}},
- Purpose: {{{Appointment__c.PurposeTopic__c}}}

We look forward to discussing your needs and working together to achieve your objectives.

Best regards,
{{{Recipient.Name}}},
EduConsultantPro

4. Click **Save** and **Activate**

Step 5: Create the Rejection Template

1. Click **New Email Template** again.
2. Enter the following details:
   - **Template Name**: **Rejection Template**
   - **Folder**: Select **Appointment Templates** (or the folder you created).
   - **Email Subject**: Enter **Appointment Request Rejected**.

3. In the **HTML Body**, enter the following text:

Dear {{{Appointment__c.Student_Name__c}}},

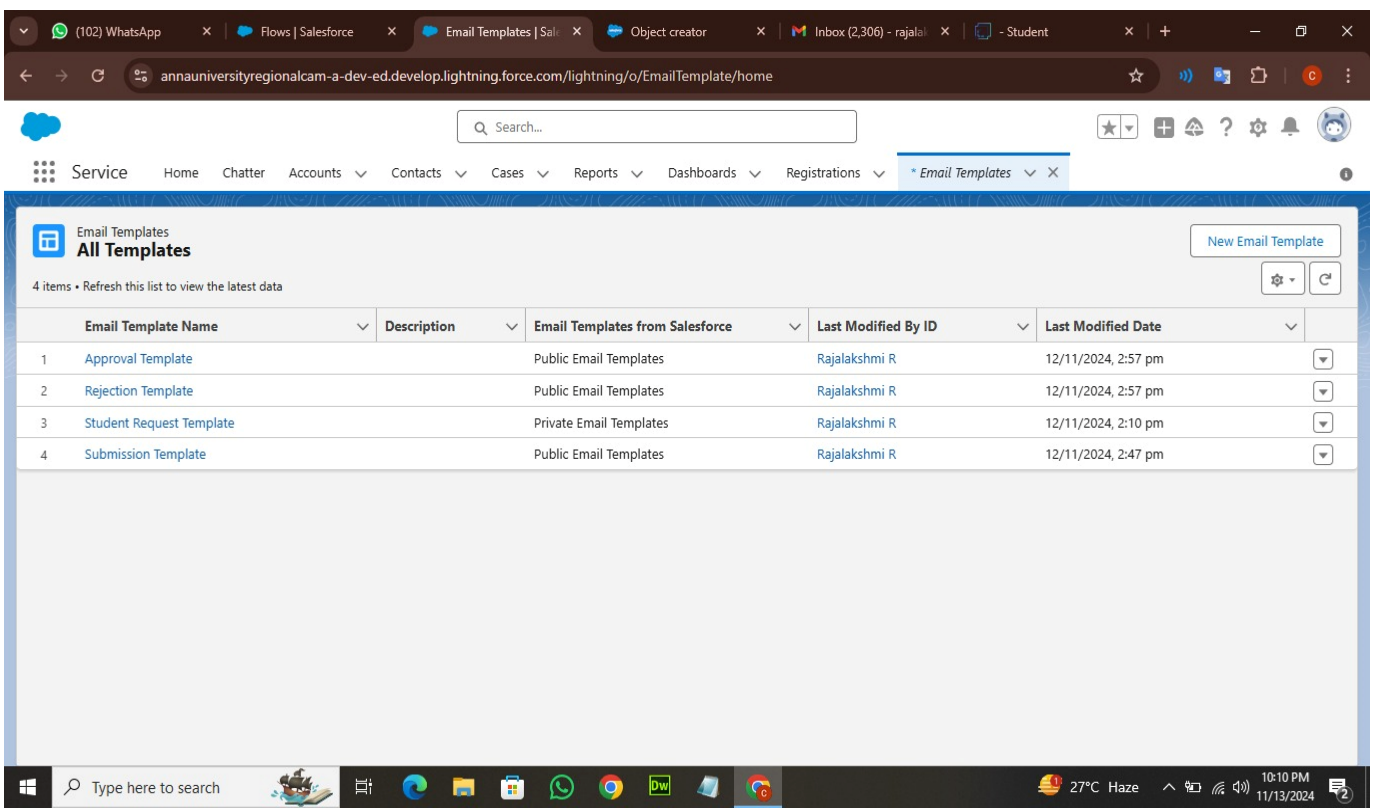
We regret to inform you that your appointment request scheduled for {{{Appointment__c.Appointment_DateTime__c}}} regarding {{{Appointment__c.PurposeTopic__c}}} could not be approved at this time.

Appointment Details:
- Appointment No: {{{Appointment__c.Name}}},
- Student Name: {{{Appointment__c.Student_Name__c}}},
- Consultant Name: {{{Appointment__c.Consultant__c}}},
- Date & Time: {{{Appointment__c.Appointment_DateTime__c}}},
- Purpose: {{{Appointment__c.PurposeTopic__c}}}

Please feel free to reach out if you would like to discuss alternative options or need further assistance. We apologize for any inconvenience this may have caused and appreciate your understanding.

Best regards,
{{{Recipient.Name}}},
EduConsultantPro

4. Click **Save** and **Activate**



8.2 Creating an Approval Process

Step 1: Go to Approval Processes in Setup

- Log in to **Salesforce** and click on the **Setup** gear icon.
- In the **Quick Find** box, type **Approval Processes**.
- Select **Approval Processes**.

Step 2: Choose Object for the Approval Process

- In the **Manage Approval Processes For** dropdown, select **Appointment**.

Step 3: Create a New Approval Process Using the Jump Start Wizard

- Click on **Create New Approval Process**.
- Choose **Use Jump Start Wizard**.

Step 4: Configure the Approval Process

- In the **Process Name** field, enter **Appointment Approval**.
- **Unique Name** will auto-populate based on the process name.
- Under **Select Approver**, choose **Automatically assign an approver using a standard or custom hierarchy field**.
- In the dropdown, select **Manager**.

Step 5: Set the Next Automated Approver

- Click **Next**.
- In **Next Automated Approver Determined By**, select **Manager**.

Step 6: Configure Record Editability Properties

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

Step 7: Save the Approval Process

- Click **Save** to create the approval process.

Step 8: View Approval Process Detail Page

- Click **View Approval Process Detail Page** to configure actions.

Step 9: Configure Initial Submission Actions - Field Update

- Under **Initial Submission Actions**, click **Add New** and select **Field Update**.
- Configure the **Field Update** as follows:
  1. **Name**: Enter **Submitted**.
  2. **Field to Update**: Choose **Appointment: Status**.
  3. **A Specific Value**: Set this to **Pending**.
- Click **Save**.

Step 10: Configure Initial Submission Actions - Email Alert

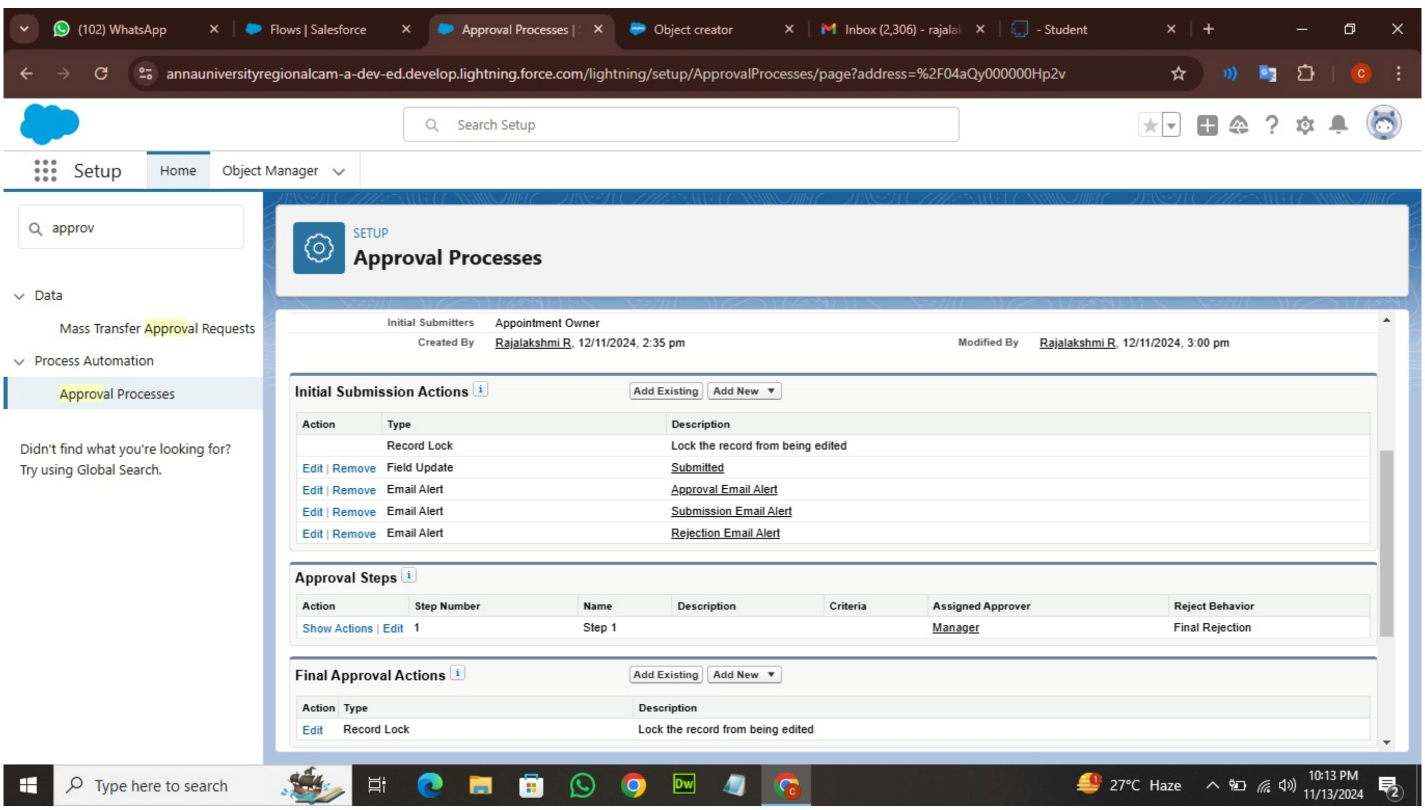
- Under **Initial Submission Actions**, click **Add New** and select **Email Alert**.
- Configure the **Email Alert** with the following details:
  1. **Description**: Enter **Submission Email Alert**.
  2. **Unique Name**: This should auto-populate.
  3. **Email Template**: Select the **Submission Template** that you created earlier.
  4. **Recipient Type**: Select **User** and choose **Your Name** from the list.
- Click **Save**.

Step 11: Configure Final Approval Actions - Field Update and Email Alert

- Under **Final Approval Actions**, click **Add New** and select **Field Update**.
- Configure the **Field Update** as follows:
  1. **Name**: Enter **Approved**.
  2. **Field to Update**: Choose **Appointment: Status**.
  3. **A Specific Value**: Set this to **Approved**.
- Click **Save**.
- Next, under **Final Approval Actions**, click **Add New** and select **Email Alert**.
- Configure the **Email Alert** with the following details:
  1. **Description**: Enter **Approval Email Alert**.
  2. **Unique Name**: This will auto-populate.
  3. **Email Template**: Select the **Approval Template** you created earlier.
  4. **Recipient Type**: Select **User** and choose **Your Name**.
- Click **Save**.

Step 12: Configure Final Rejection Actions - Field Update and Email Alert

- Under **Final Rejection Actions**, click **Add New** and select **Field Update**.
- Configure the **Field Update** as follows:
    1. **Name**: Enter **Rejected**.
    2. **Field to Update**: Choose **Appointment: Status**.
    3. **A Specific Value**: Set this to **Rejected**.
- Click **Save**.
- Next, under **Final Rejection Actions**, click **Add New** and select **Email Alert**.
- Configure the **Email Alert** with the following details:
    1. **Description**: Enter **Rejection Email Alert**.
    2. **Unique Name**: This will auto-populate.
    3. **Email Template**: Select the **Rejection Template** you created earlier.
    4. **Recipient Type**: Select **User** and choose **Your Name**.
- Click **Save**.



9. Creating a ScreenFlow for Existing Student to Book an Appointment

9.1 Adding Screen Element

Step 1: Open Flow Builder

- Go to **Setup** in Salesforce by clicking the gear icon.
- In the **Quick Find** box, type **Flow Builder**.
- Select **Flow Builder**.

Step 2: Create a New Screen Flow

- Click on **New Flow**.
- In the flow types, select **Screen Flow**.
- Click **Create**.

Step 3: Add a Screen Element

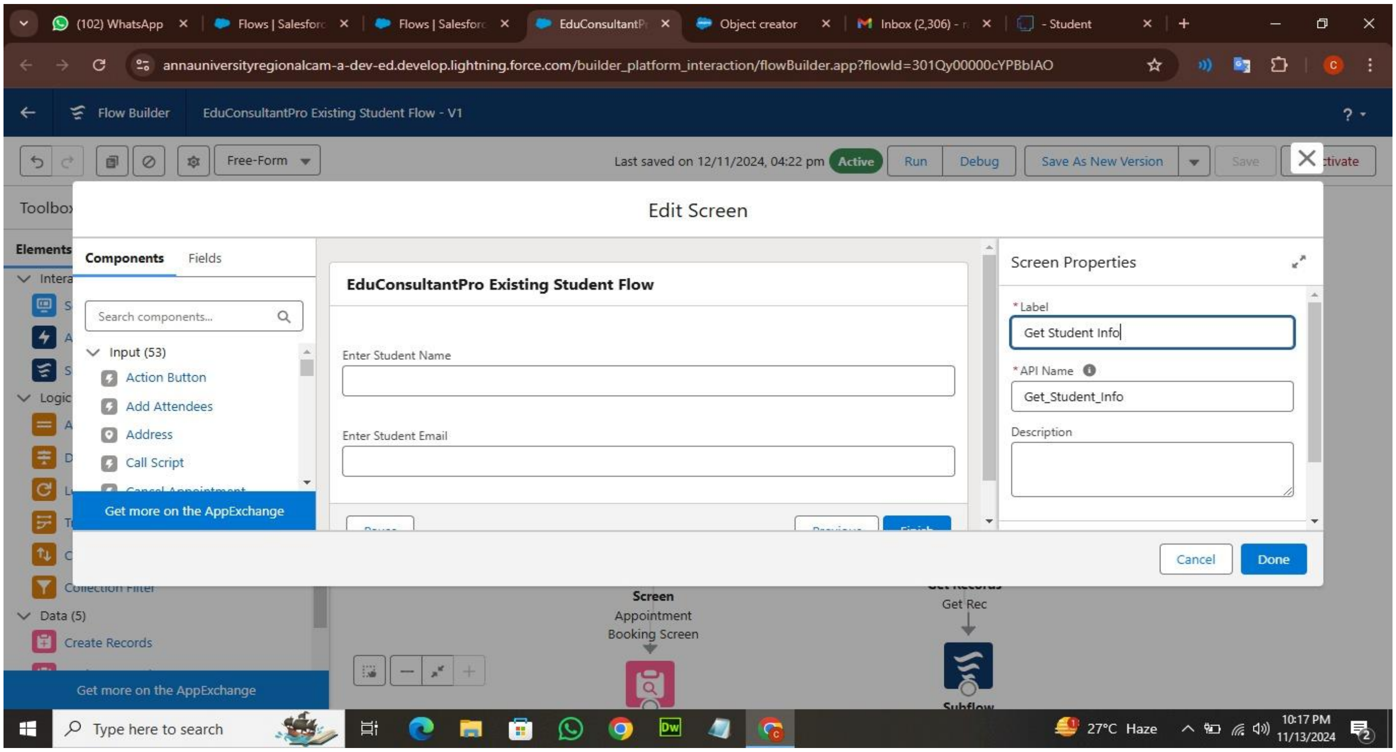
- Drag the **Screen** element from the **Elements** panel on the left into the flow canvas.
- In the **Screen Properties** pane, set the **Label** to **Get Student Info**.

Step 4: Add Text Components to the Screen

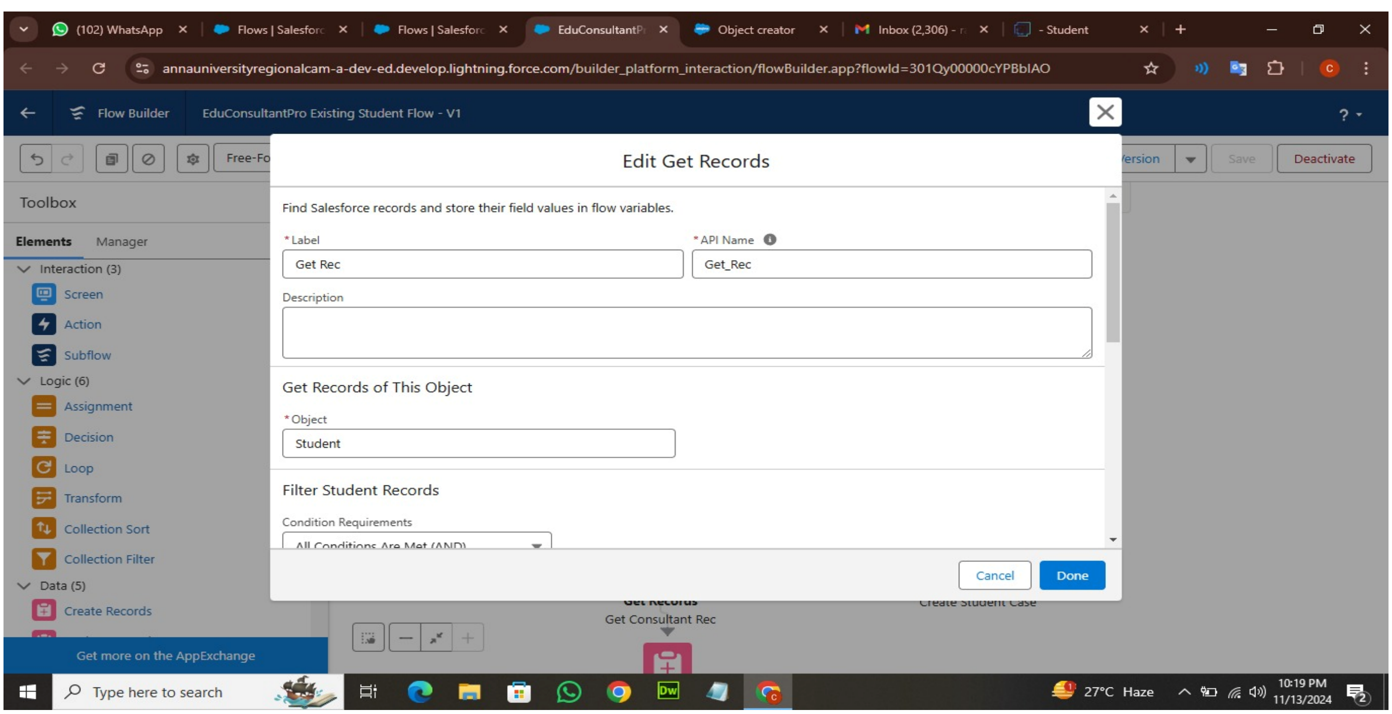
- In the **Components** panel on the left, find **Text** and drag it onto the screen.
- For the **Label** of the first text component, enter **Enter Student Name**.
- Drag another **Text** component onto the screen.
- For the **Label** of the second text component, enter **Enter Student Email**.

Step 5: Finish the Screen Configuration

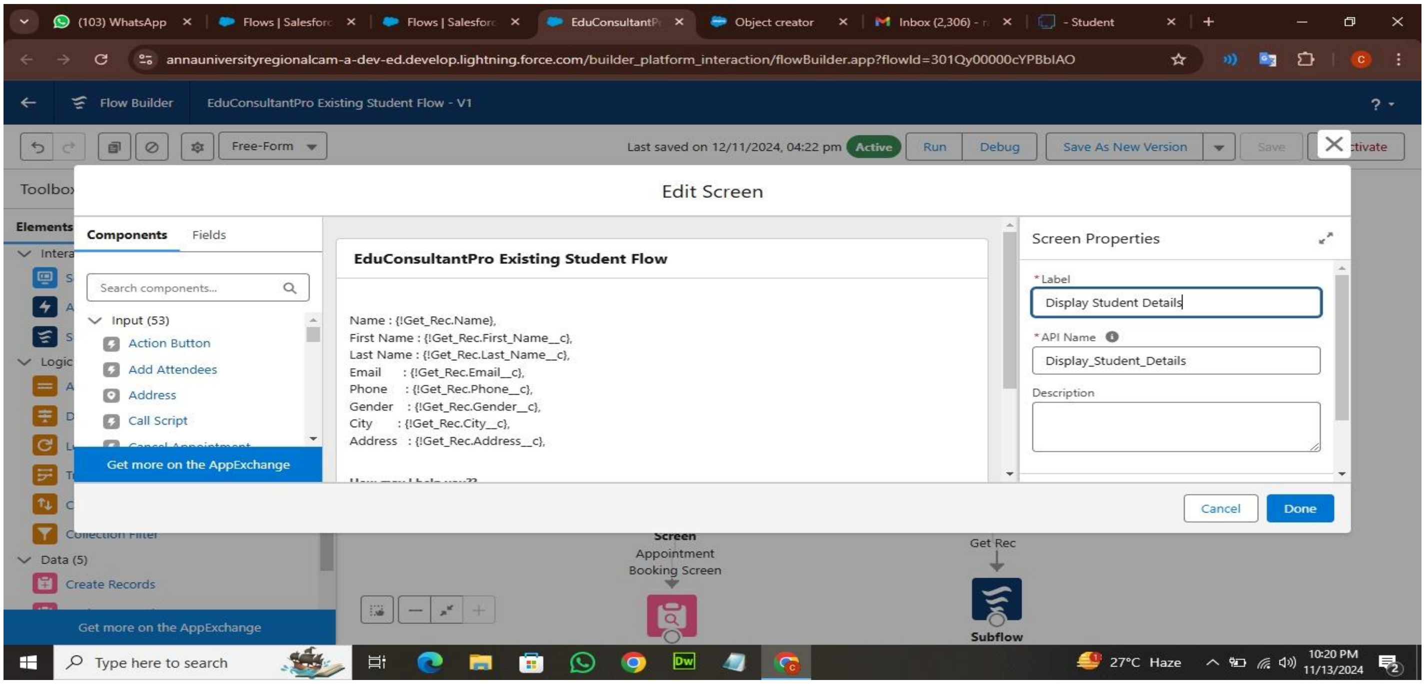
- After adding both text components, click **Done** to save the screen.



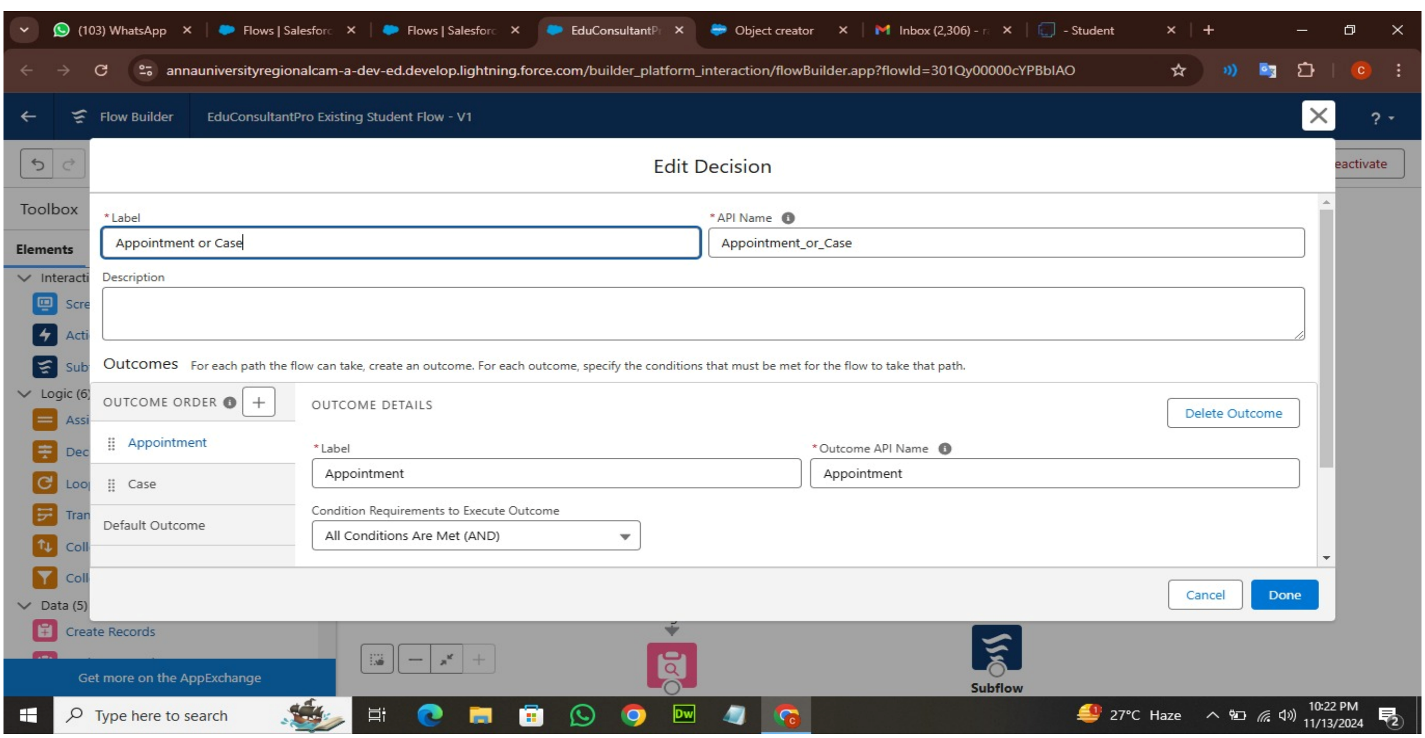
9.2 *Adding GET Record Element*



9.3 *Adding Screen Element*



9.4 *Adding Decision Element*



9.5 *Creating Appointment Record using Create Records Element*

Step 1: Open Flow Builder

- Go to **Setup** in Salesforce by clicking the gear icon.
- In the **Quick Find** box, type **Flow Builder** and select it.
- Open your existing flow or create a new **Screen Flow** if needed.

Step 2: Add a Create Records Element

- In the **Elements** panel, find **Create Records** and drag it onto the flow canvas after the **Get Consultant Rec** element.
- In the **Label** field, enter **Create Appointment**.

Step 3: Configure the Create Records Element

- For **How many records to Create**, select **One**.
- For **How to Set the Record Fields**, choose **Use separate resources, and literal values**.

Step 4: Select the Object

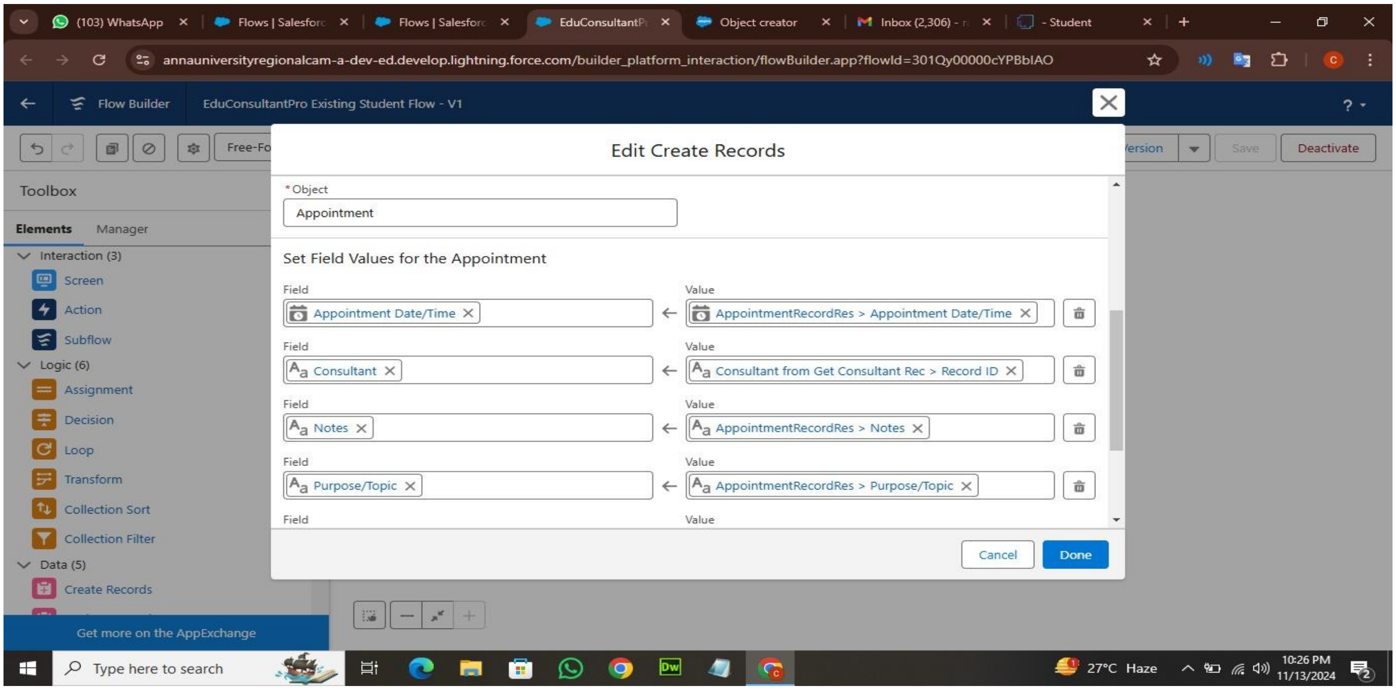
- For **Object**, select **Appointment**.

Step 5: Map the Fields with Values

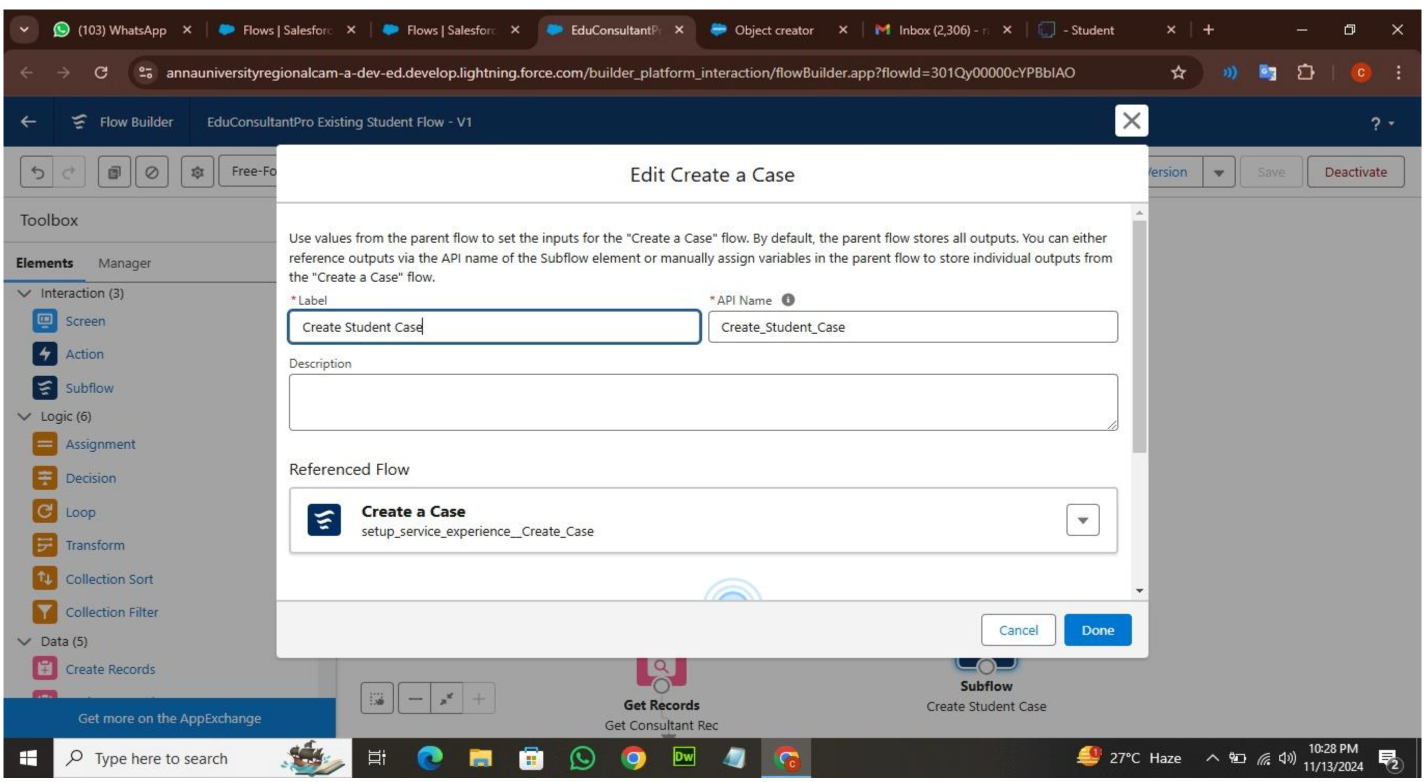
- Click **Add Field** to map each field in the Appointment object with its respective value:
  1. **Field**: **Appointment_DateTime__c**
     1. **Value**: Select **{!AppointmentRecordRes.Appointment_DateTime__c}** (to get the value from the resource).
  2. **Field**: **Consultant__c**
     1. **Value**: Select **{!Get_Consultant_Rec.Id}** (this gets the Consultant record's ID).
  3. **Field**: **Notes__c**
     1. **Value**: Select **{!AppointmentRecordRes.Notes__c}**.
  4. **Field**: **PurposeTopic__c**
     1. **Value**: Select **{!AppointmentRecordRes.PurposeTopic__c}**.
  5. **Field**: **Student_Name__c**
     1. **Value**: Select **{!Get_Rec.Id}** (this gets the Student record’s ID).

Step 6: Finish the Configuration

- After setting all fields, click **Done** to save the Create Records element.



9.6 *Creating Subflow Element*



10. Creating a ScreenFlow to Combine all the flows at one place

10.1 *Adding Screen Element*

Step 1: Add a New Screen Element

- In **Flow Builder**, go to your flow canvas.
- From the **Elements** panel, drag the **Screen** element onto the canvas and place it at the desired point in the flow.
- In the **Label** field of the screen properties, enter **Welcome Screen**.

Step 2: Add a Display Text Component

- From the **Components** panel on the left, search for **Display Text** and drag it into the main screen area.
- In the **Label** field, enter **SuccessMessage**.

Step 3: Paste the Welcome Message in the Display Text Component

- In the **Text** area (Resource picker box) of the **Display Text** component, paste the following content:

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.

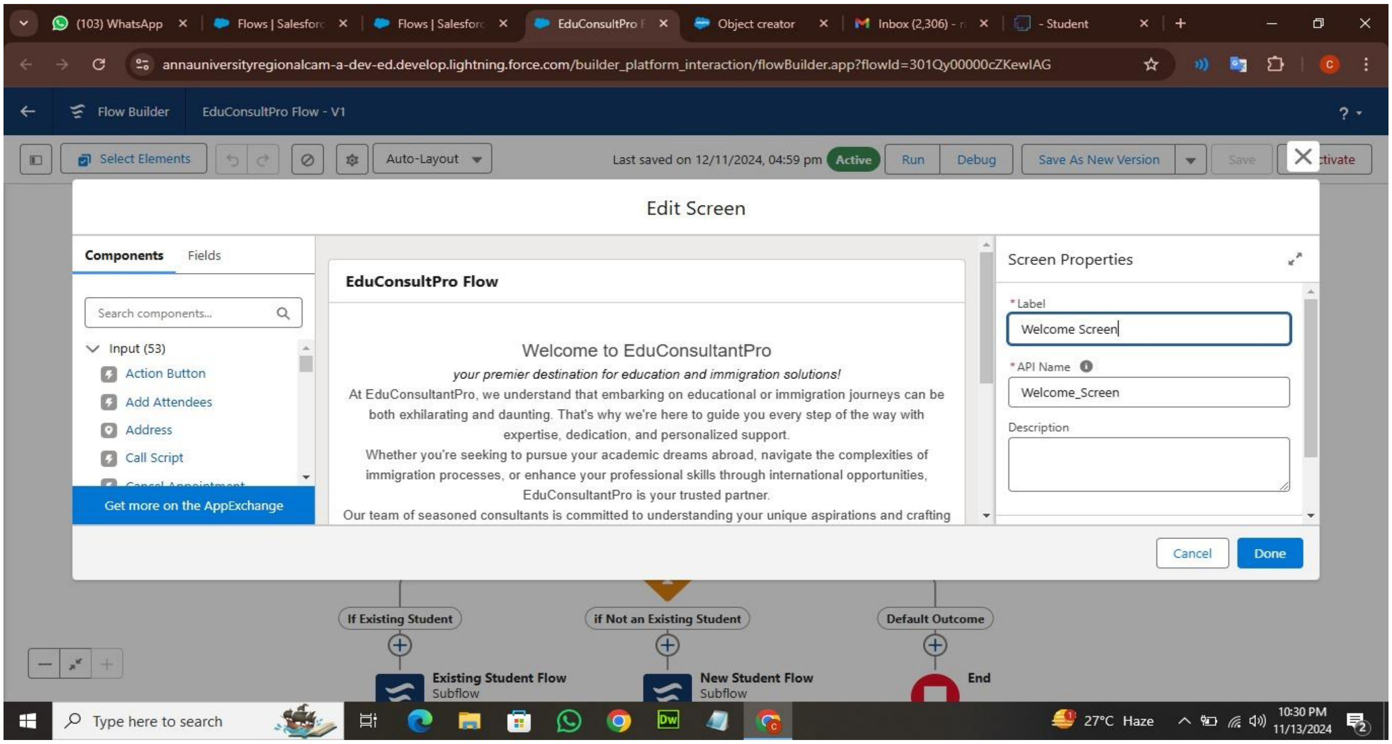
Our team of seasoned consultants is committed to understanding your unique aspirations and crafting tailored strategies to help you achieve your goals efficiently and effectively. From selecting the right educational institution to navigating visa procedures, our comprehensive services cover all aspects 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.

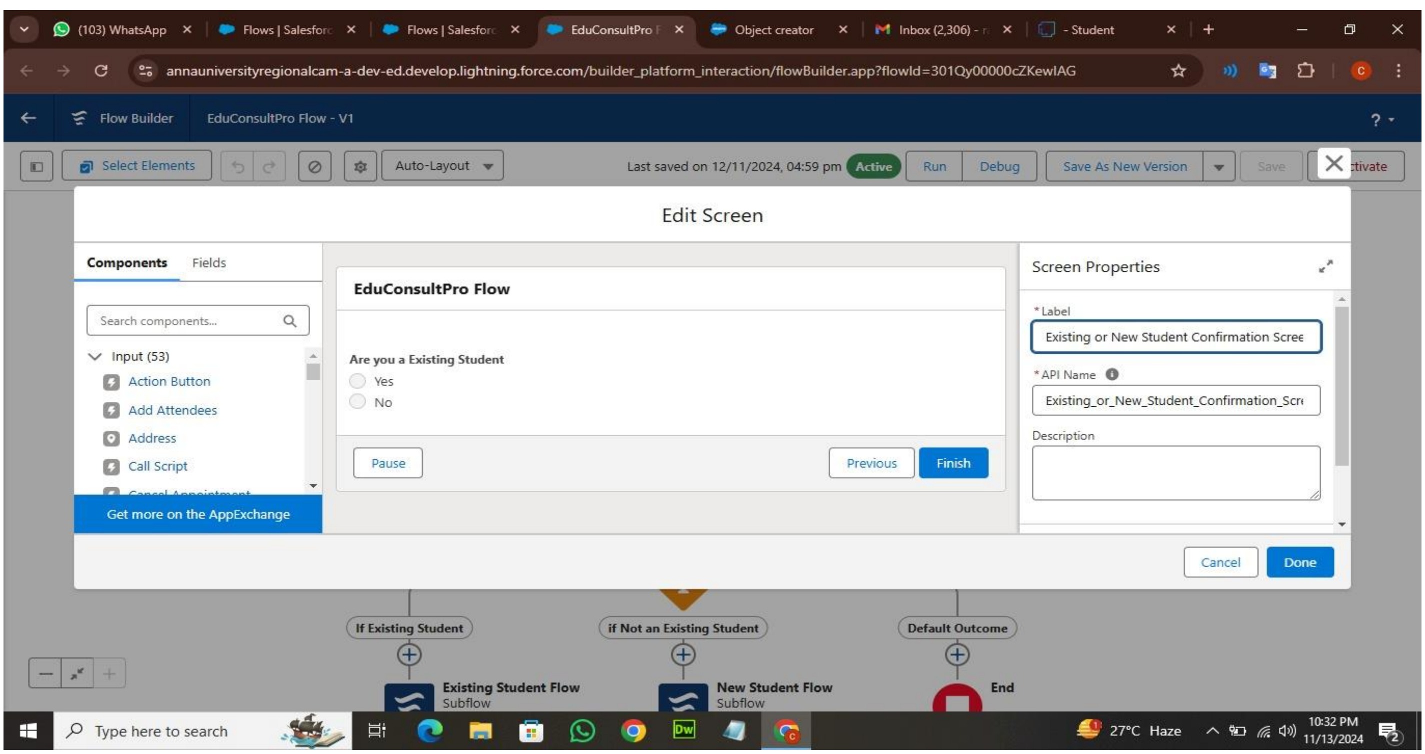
Welcome to EduConsultantPro – where your aspirations meet our expertise, and together, we pave the path to success. Let's embark on this transformative journey together!

Step 4: Finish Configuring the Screen

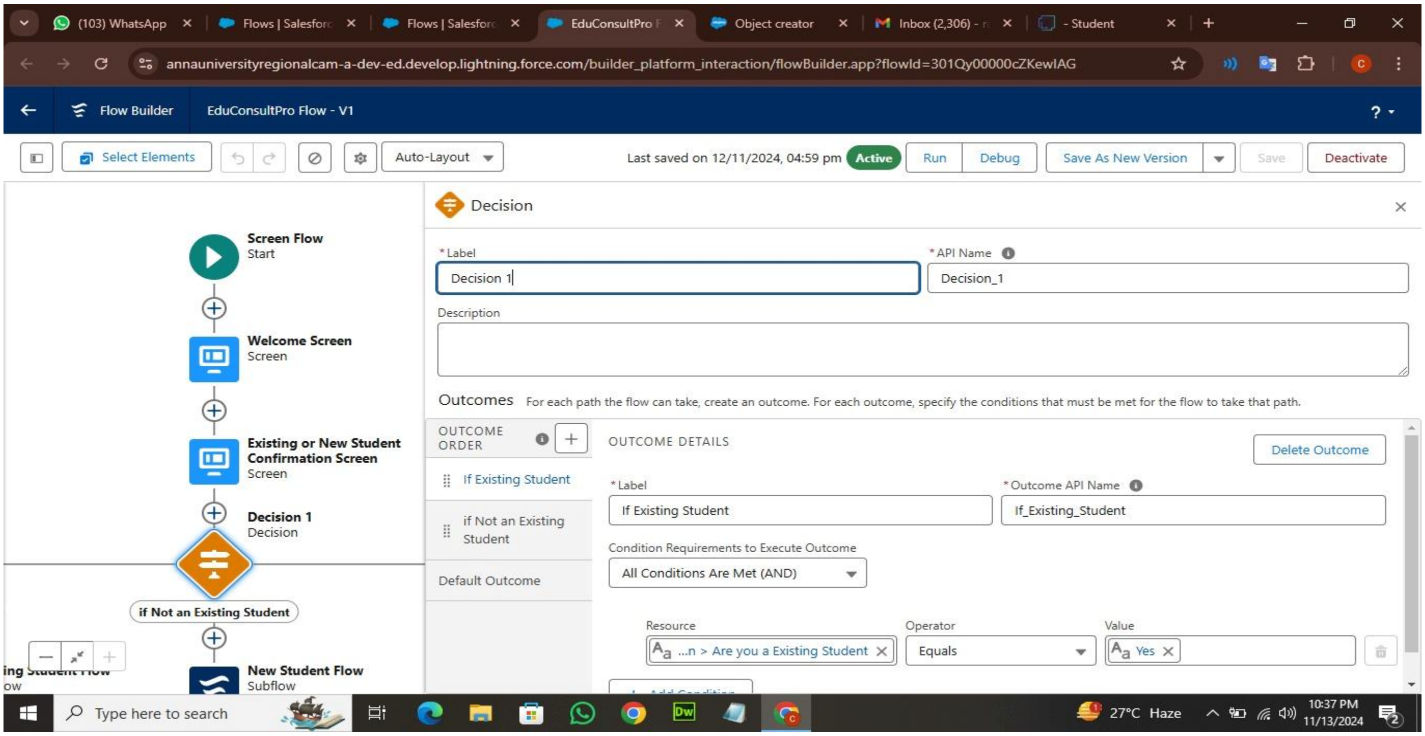
- After entering the text, click **Done** to save the **Welcome Screen** element.



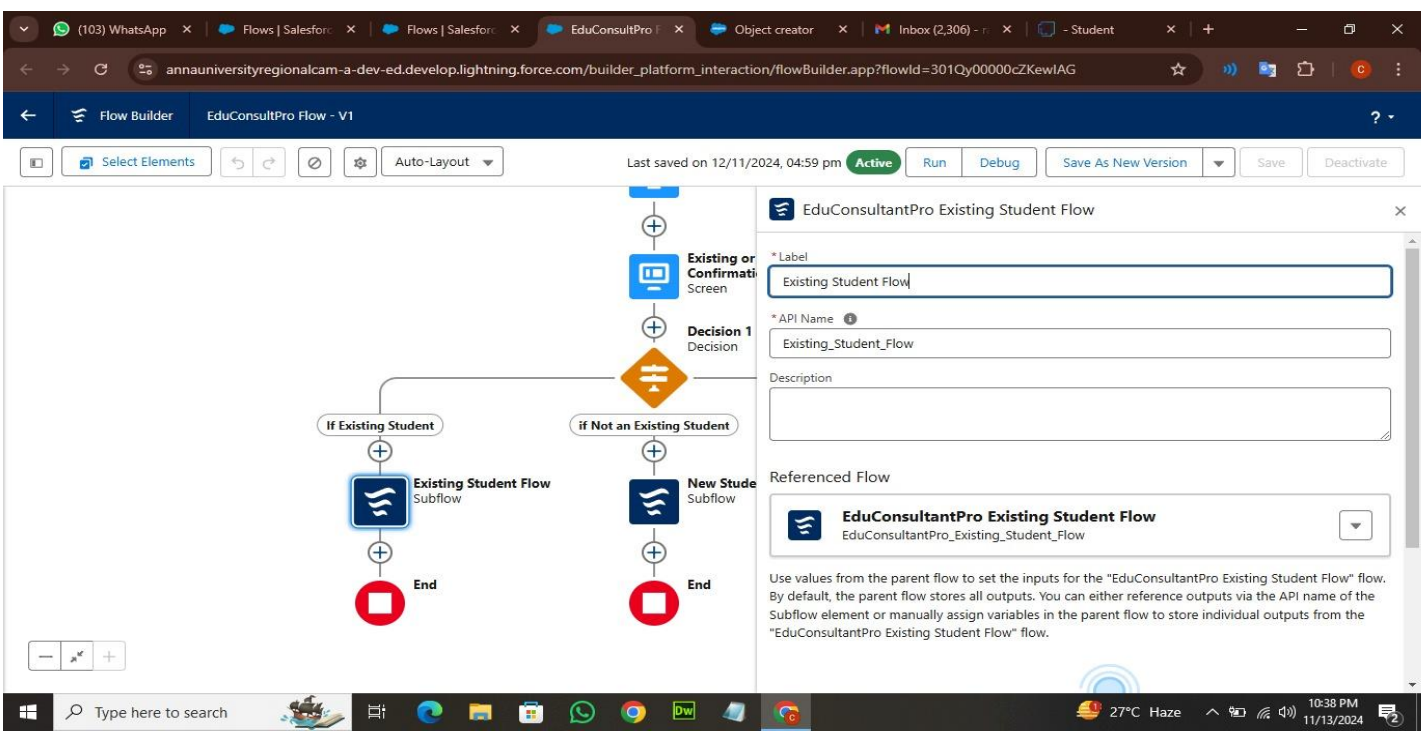
10.2 *Adding Screen Element*



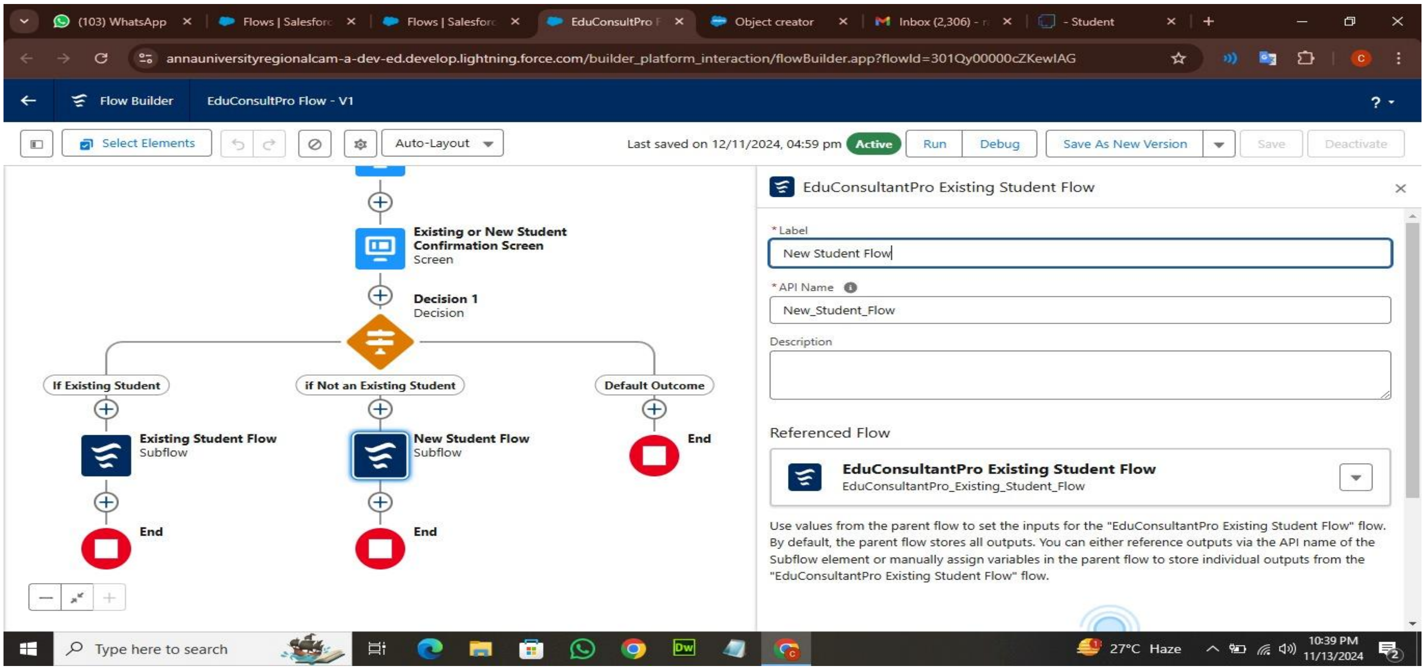
10.2 Adding Decision Element



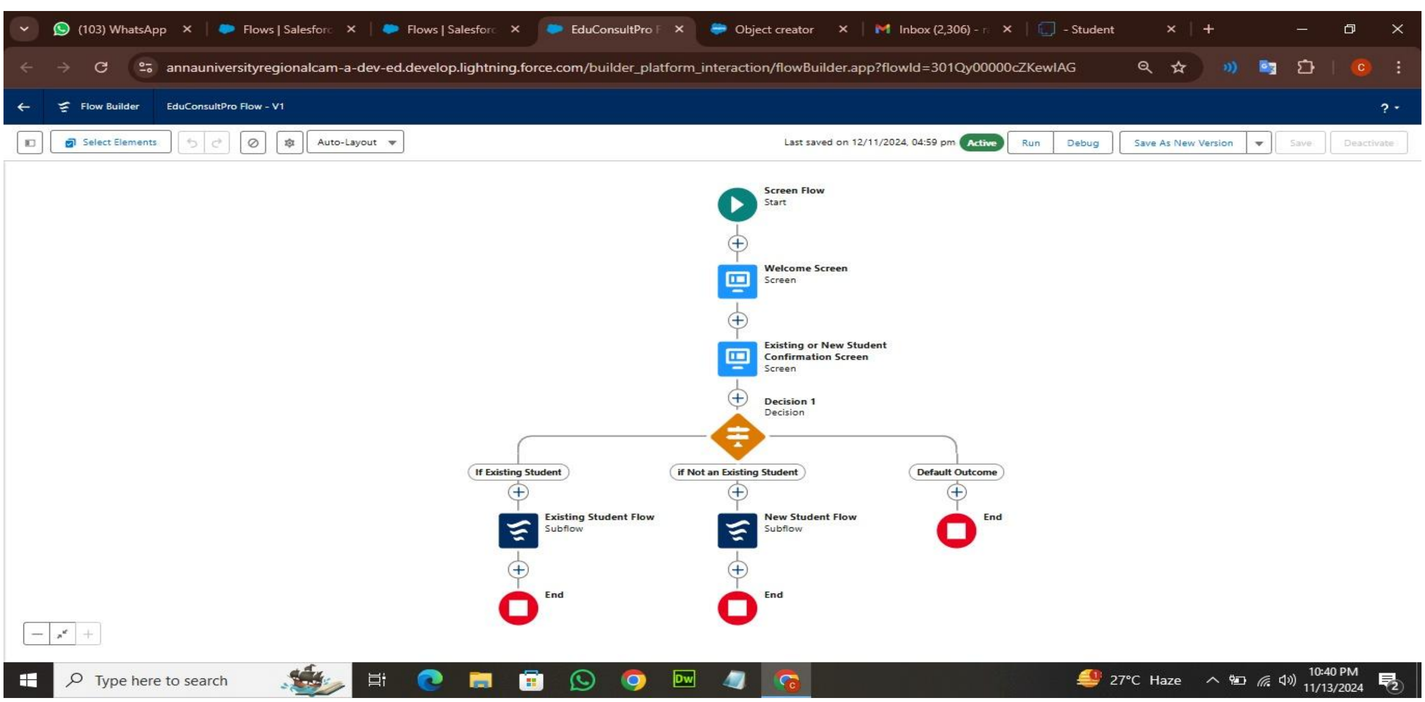
10.3 Adding Subflow Element



10.4 Adding Subflow Element



10.5 Final Flow



11. Creating a lightning app page

Step 1: Open Lightning App Builder

- In **Setup**, type **App Builder** in the **Quick Find** box.
- Select **Lightning App Builder**.

Step 2: Create a New Home Page

- Click on **New**.
- Select **Home Page** and click **Next**.

Step 3: Configure the Home Page

- Name the page **EduConsultPro Home Page**.
- For the layout, select the **Standard Home Page** template.
- Click **Done** to create the page layout.

Step 4: Add the Flow Component

- In the component list on the left, find the **Flow** component.
- Drag the **Flow** component to the **top-right region** of the page.

Step 5: Select the EduConsultantPro Flow

- In the **Flow** component properties, search for and select the **EduConsultantPro Flow**.
- Click **Save** to save the page layout.

Step 6: Activate the Page

- Click **Activate** to make this page available in Salesforce.

Step 7: Assign the Page to Apps and Profiles

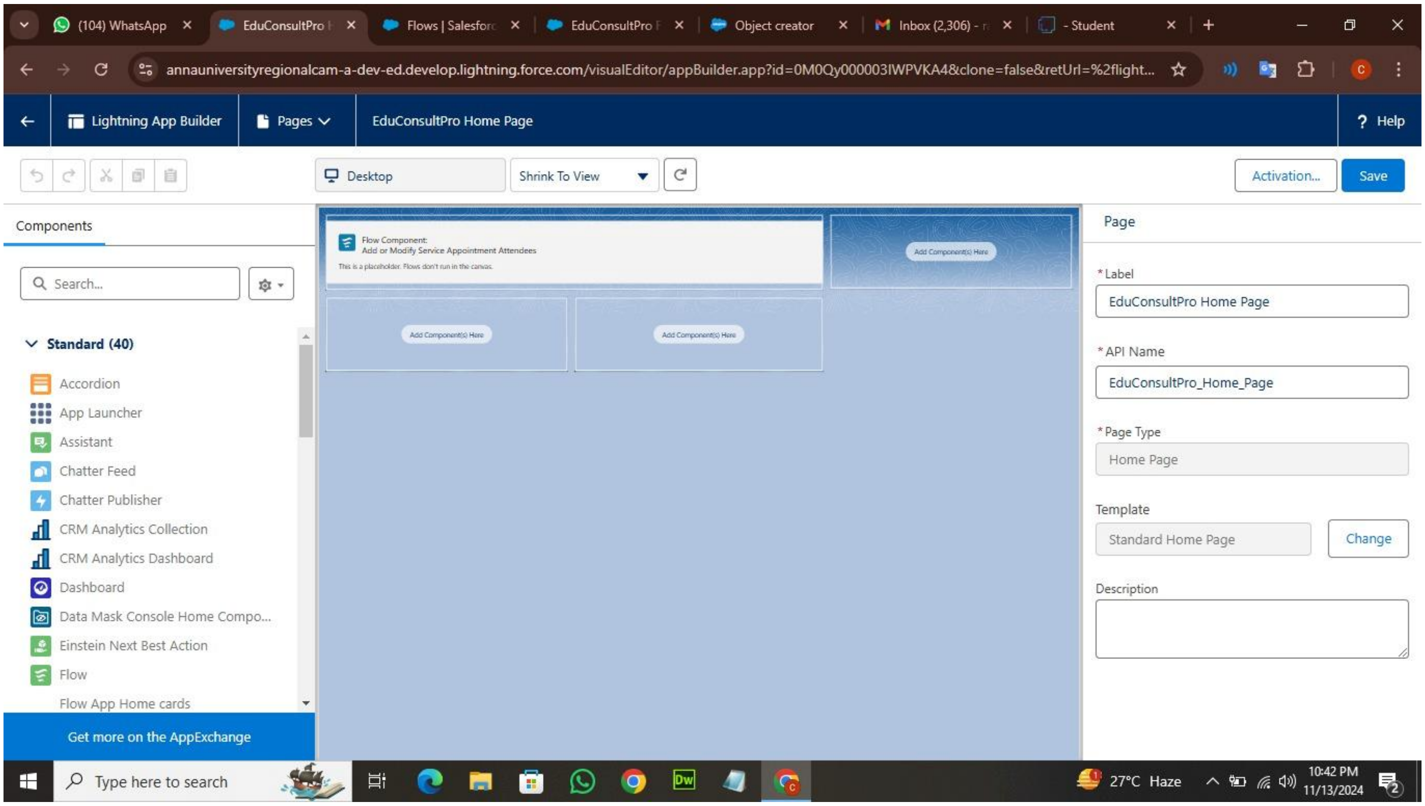
- In the **Activate** settings, choose **App and Profile**.
- Click **Assign to Apps and Profiles**.
- Select the **Sales** app and click **Next**.

Step 8: Select the System Administrator Profile

- Scroll down the list of profiles and select **System Administrator**.
- Click **Next**.

Step 9: Review and Save

- Review the app and profile assignments to ensure they are correct.
- Click **Save** to finalize the page assignment.


Lightning App Builder
Pages
EduConsultPro Home Page
Help
Desktop
Shrink To View
Activation...
Save
Components
Search...
Standard (40)
Accordion
App Launcher
Assistant
Chatter Feed
Chatter Publisher
CRM Analytics Collection
CRM Analytics Dashboard
Dashboard
Data Mask Console Home Compo...
Einstein Next Best Action
Flow
Flow App Home cards
Get more on the AppExchange
Page
Label
EduConsultPro Home Page
API Name
EduConsultPro_Home_Page
Page Type
Home Page
Template
Standard Home Page
Change
Description