

A CRM Application to Manage the Services Offered **By a Institution**

Project Overview

The CRM Application for Institutional Services Management is a software solution designed to centralize, streamline, and automate the management of services offered by an institution. Built on Salesforce, it provides a unified platform to handle customer interactions, monitor service delivery, and enhance communication between staff and customers. The application ensures data accuracy, improves operational efficiency, and supports real-time decision-making with insightful reports and dashboards.

Objectives

1. Real-Time CRM Implementation

Learn to build and configure a Salesforce-based CRM system tailored to manage institutional services using real-world scenarios.

2. Data Modeling

Design and implement custom objects, fields, and relationships to represent services, customers, and interactions within the Salesforce data model.

3. Creating an Application

Develop a custom Lightning App with tabs, page layouts, and specific configurations to meet business needs.

4. User Interface Customization

Customize the UI using page layouts, record types, and tabs to provide a seamless experience for institutional staff.

5. Bulk Data Import

Use Salesforce Data Import Wizard or Data Loader for efficient migration of large data sets, simulating real-world data scenarios.

6. Security Implementation

Apply role-based access control, permission sets, profiles, and organization-wide default (OWD) settings to protect sensitive information.

7. Group Collaboration

Leverage Salesforce Chatter for enhanced communication and coordination between teams.

8. Reports and Dashboards

Generate reports and dashboards to monitor service performance, customer interactions, and overall efficiency.

Key Features and Concepts Utilized

Centralized Management: A single source of truth for all institutional services and customer interactions.

Improved Productivity: Automation of repetitive tasks allows teams to focus on strategic objectives.

Enhanced Data Accuracy: Real-time synchronization ensures data integrity.

Advanced Security: Role-based permissions safeguard sensitive information.

Data-Driven Decision-Making: Dashboards and reports provide actionable insights.

Solution Design

1. Data Model Documentation

Create an entity-relationship diagram (ERD) showcasing custom objects (e.g., Customer, Service, Feedback) and their relationships.

Define fields with data types and validation rules, and document relationships (e.g., lookup, master-detail).

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 Values Separated By Field Label Source ☐ Enter manually ☒ Detect from row * Field Labels Row Import 5 rows of Data? ☐ No, skip import ☒ Yes, import data Record Name Field

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	<input checked="" type="checkbox"/>	IELTS
✓ Description	×	Description	Text	<input checked="" type="checkbox"/>	Let's Learn IELTS
✓ Start Date	×	Start Date	Phone	<input checked="" type="checkbox"/>	03-01-2024
✓ End Date	×	End Date	Date	<input checked="" type="checkbox"/>	05/31/2024
✓ Instructor	×	Instructor	Text	<input checked="" type="checkbox"/>	Sandeep

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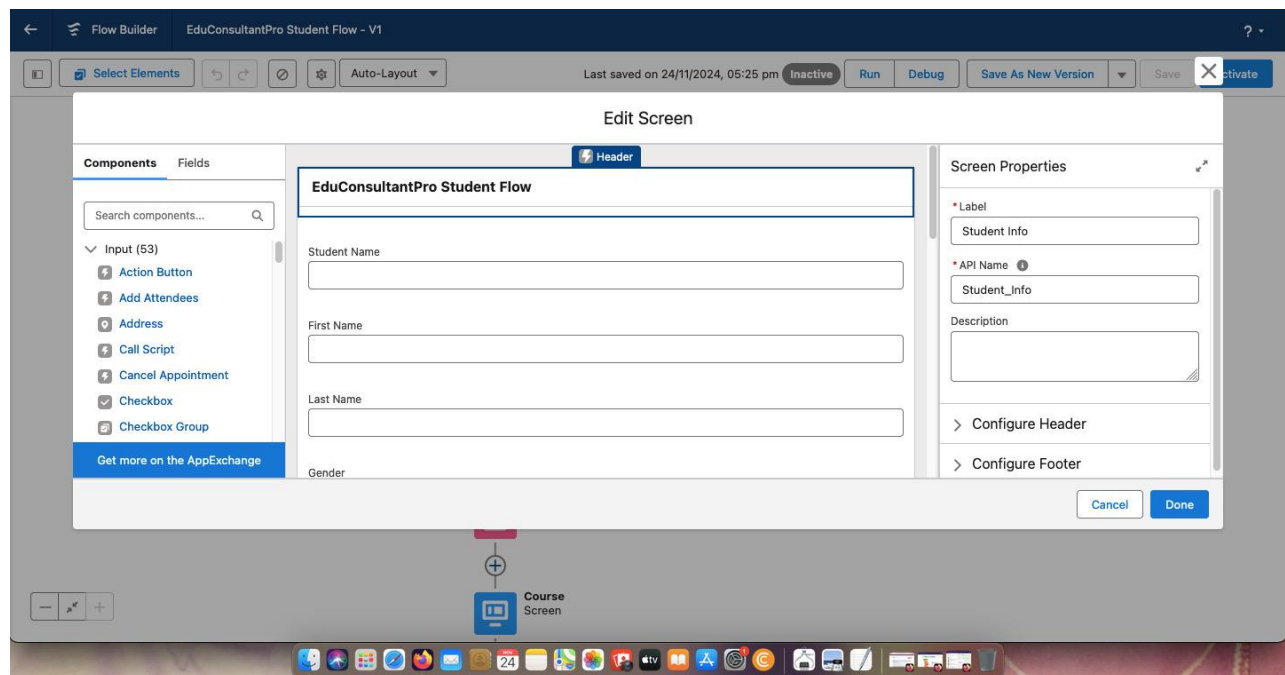
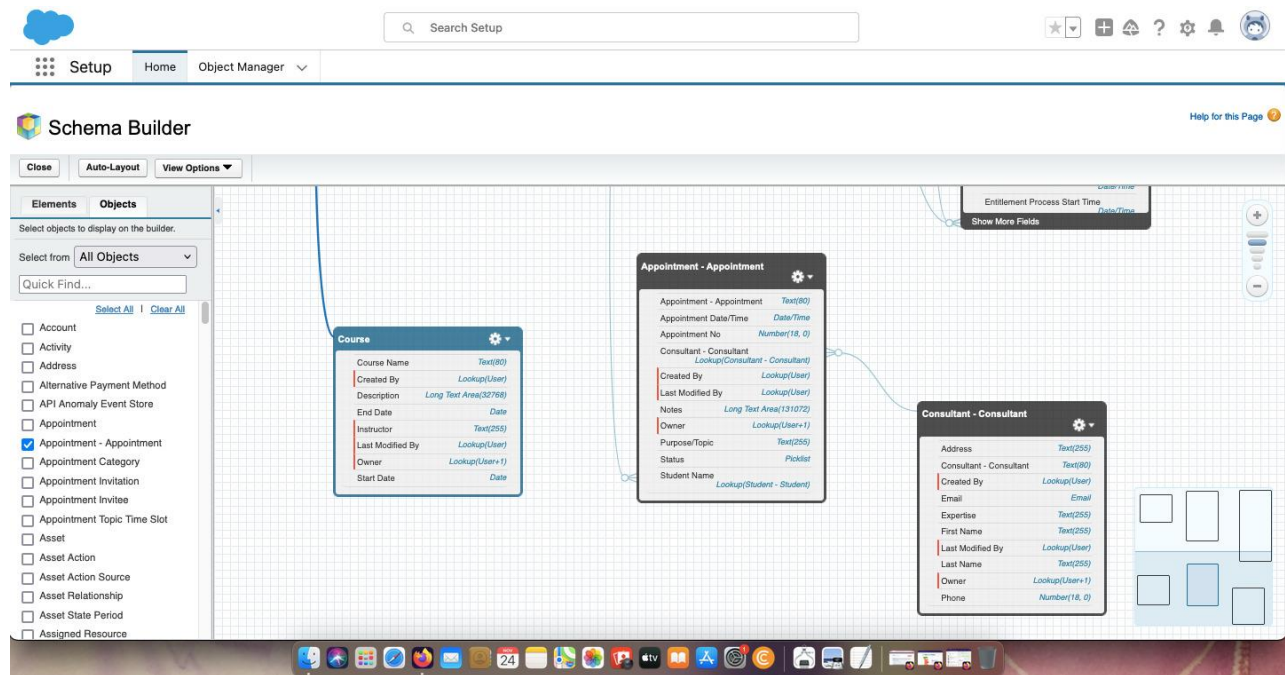
2. User Interface Design Documentation

Lightning App Design: Include screenshots of the homepage and descriptions of tabs like Service, Customer, and Feedback.

Custom Tabs: Highlight features like search, list views, and detailed record layouts.

Page Layouts: Detail field groupings and their purposes, supported with annotated screenshots.

The screenshot shows the Salesforce Schema Builder interface. On the left, there is a sidebar with a list of objects including Account, Activity, Address, Alternative Payment Method, API Anomaly Event Store, Appointment, Appointment - Appointment, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, Asset Action Source, Asset Relationship, Asset State Period, and Assigned Resource. The 'Appointment - Appointment' object is selected. The main workspace displays three object diagrams: 'Registration', 'Student - Student', and 'Case'. The 'Registration' object is connected to the 'Student - Student' object, which is in turn connected to the 'Case' object. Each object diagram shows its fields and their data types. For example, the 'Registration' object has fields like Course Name, Created By, Last Modified By, Owner, Registration Name, Registration No, and Student Name. The 'Student - Student' object has fields like Address, City, Created By, Date of Birth, Email, First Name, Gender, Last Modified By, Last Name, Owner, Phone, Qualification, Student Name, University Name, and Year of Passing. The 'Case' object has fields like Account Name, Asset, Business Hours, Case Number, Case Origin, Case Owner, Case Reason, Case Source, Closed When Created, Contact Email, Contact Fax, Contact Mobile, Contact Name, Contact Phone, Contact Type, Date/Time Closed, Date/Time Opened, Description, Engineering Req Number, Enrollment Name, Enrollment Process End Time, Enrollment Process Start Time, and Escalated. The interface also includes a 'Search Setup' bar at the top and a 'Help for this Page' link on the right.

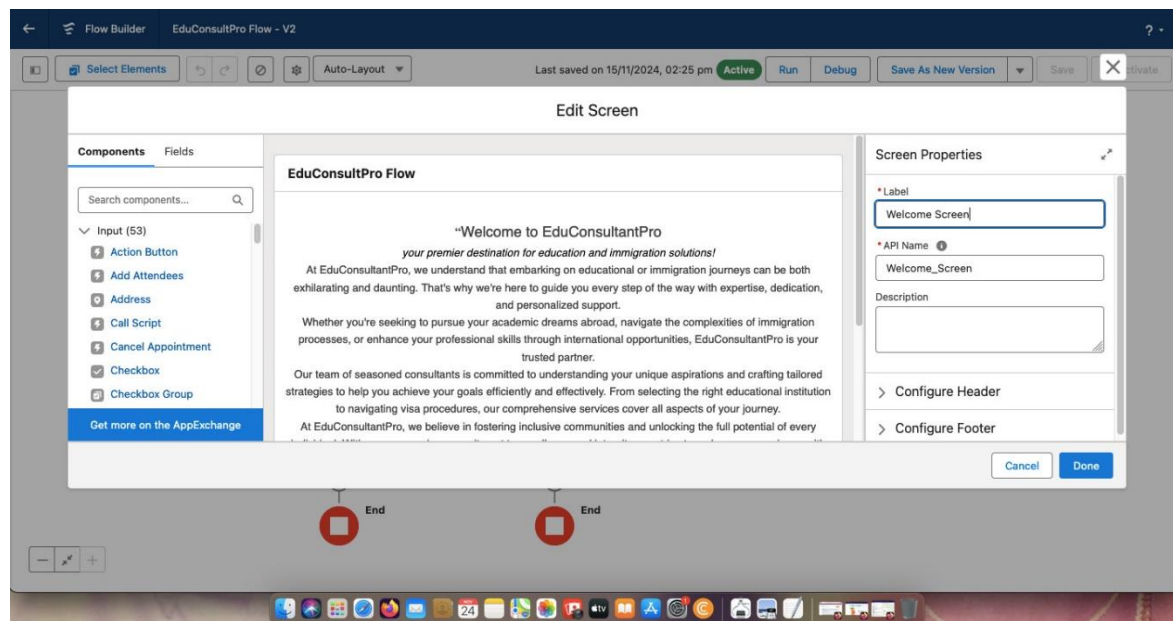
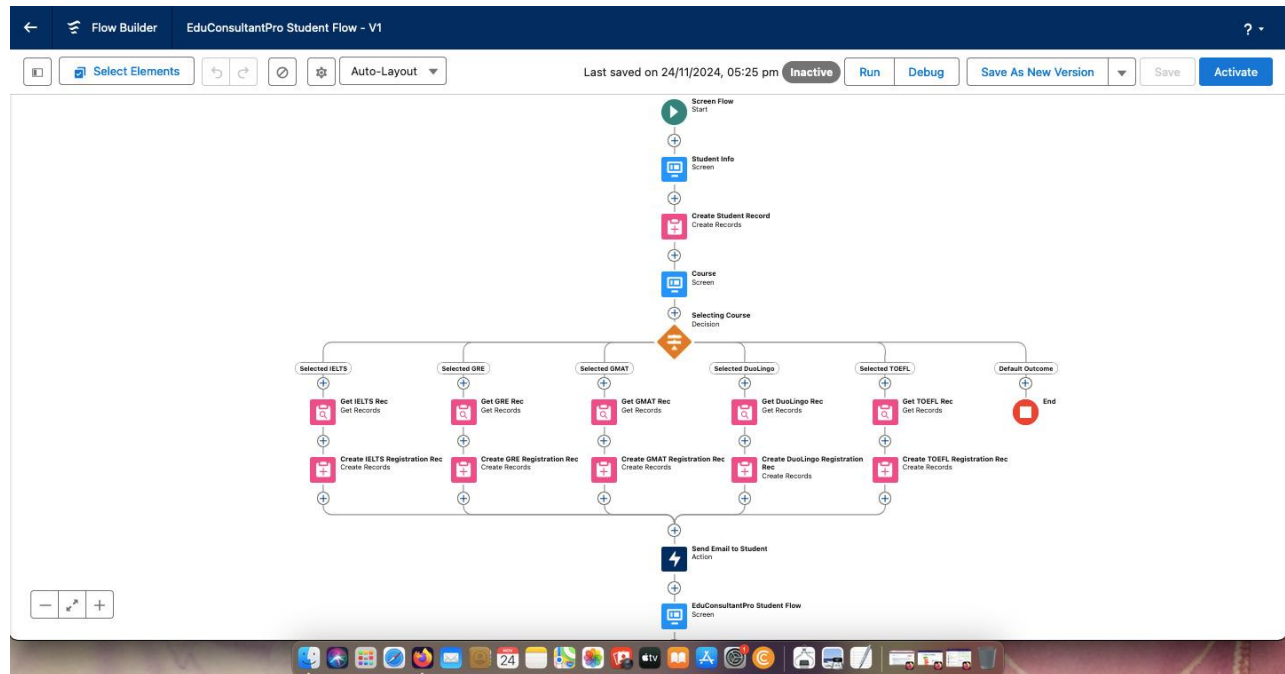


3. Business Logic Documentation

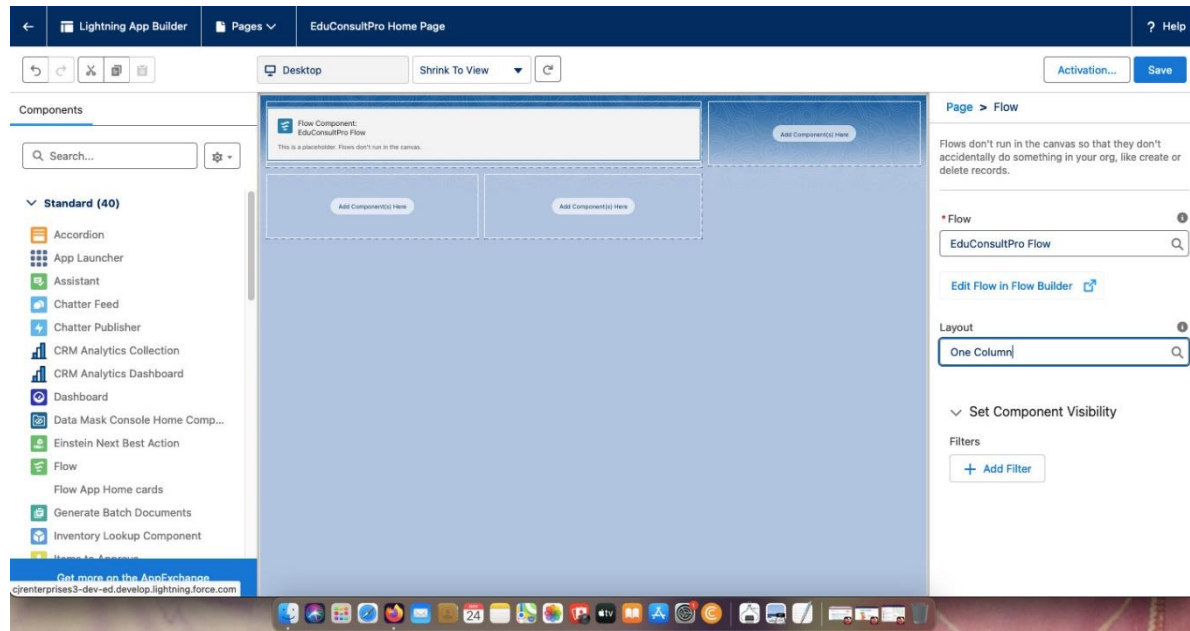
Apex Triggers: Automate updates such as service status changes. Provide descriptions and code snippets.

Approval Processes: Use flowcharts to illustrate stages (e.g., customer feedback review).

Workflow Rules: Automate notifications for critical events (e.g., service delivery completion).



Process Builder and Flow: Document automated flows, including diagrams and screenshots



Conclusion

The implementation of this CRM application has successfully enhanced the institution's ability to manage services efficiently. By centralizing data, automating workflows, and ensuring robust security, the platform empowers staff to focus on delivering excellent services. Customizable dashboards and real-time insights further enable data-driven decision-making, ensuring the institution remains adaptive and customer-focused. This project highlights Salesforce's capability in transforming institutional operations through digital innovation.