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### PROJECT

### TITLE: A CRM application to manage the services offered by an institution

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### PROJECT DONE BY

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**AIM**

A CRM application to manage the services offered by an institution is to provide a centralized, efficient platform for handling interactions, managing services, and optimizing communication between the institution and its stakeholders (such as students, clients, or partners). The goal is to streamline processes, improve user satisfaction, enhance service delivery, and foster long-term relationships with customers or clients. Here's a breakdown of specific aims for such an application:

1. Improve Customer Engagement and Experience

Personalized Communication

Enable tailored communication based on user preferences, past interactions, and service history.

Service Availability and Transparency

Provide users with clear visibility into the services offered, availability, and their own progress (e.g., course registration status, service usage).

Proactive Support

Use data insights to anticipate and address user needs, providing proactive help and ensuring a smoother experience.

2. Enhance Service Management and Delivery

Streamlined Operations Automate and centralize the management of services, from service requests to fulfillment, ensuring quicker response times and less administrative overhead.

Service Tracking and Reporting Provide administrators and staff with dashboards to monitor the status of services being delivered, track performance against service level agreements (SLAs), and ensure the timely delivery of services.

Efficiency Gains Minimize errors and improve consistency in how services are provided through clear documentation, standard workflows, and automated reminders for both staff and clients.

3. Increase Operational Efficiency and Productivity

Centralized Data Management Centralize all client data, service information, and communication history in one platform to avoid duplication, reduce errors, and facilitate better decision-making.

Automation of Routine Tasks Automate repetitive tasks like follow-up emails, reminders, and ticket escalations, freeing up staff time to focus on more complex tasks.

Analytics and Reporting Provide detailed insights into user behavior, service performance, and operational bottlenecks to help the institution optimize resources and make data-driven decisions.

4. Enhance Collaboration Across Teams

Cross-Department Coordination Enable different teams (e.g., admissions, support, sales, marketing) to collaborate and have real-time access to the same data. This ensures consistent communication and reduces fragmentation in service delivery.

Task Management Use features like task assignments, to-do lists, and reminders to keep all team members aligned on key responsibilities and deadlines.

5. Build and Nurture Relationships

Customer Retention By understanding customer needs, providing excellent service, and anticipating future requirements, a CRM can help institutions retain existing users and build long-term relationships.

Feedback and Improvement Allow users to provide feedback on services, and use that feedback to make continuous improvements, ensuring customer satisfaction and loyalty.

6. Facilitate Data-Driven Decisions

Performance Metrics Track key performance indicators (KPIs) such as user satisfaction, service delivery time, and engagement levels to assess the success of services.

Market Insights Use CRM analytics to identify trends, spot areas for improvement, and gain insights into market demands, helping the institution adjust its services or marketing strategies accordingly.

7. Scale and Adapt

Growth Support As the institution grows, a CRM can scale to handle larger volumes of users and services without sacrificing performance or usability.

Customizability A CRM application can be tailored to the specific needs of the institution, whether it’s a school, university, healthcare provider, or any other service-oriented organization.

Streamline service management to ensure efficient delivery and tracking of services.

Enhance user engagement through personalized interactions and seamless communication.

Increase operational efficiency by automating tasks and centralizing data.

Facilitate collaboration across different departments involved in service delivery.

Make data-driven decisions through detailed analytics and reporting.

Ensure scalability for future growth and adaptability.

OBJECTIVES

1. Centralize Customer and Service Data

To consolidate all customer (student, client, or beneficiary) information, service records, and communication history in one centralized system.

Ensure all stakeholders (administrators, staff, and even customers) have easy access to up-to-date and accurate information, enabling better decision-making and reducing data silos.

2. Enhance User Experience

To provide a seamless, personalized, and engaging experience for users (students, clients, or customers).

Use data to offer tailored services, relevant content, and proactive support that anticipates user needs, thereby improving satisfaction and retention.

3. Improve Service Delivery and Efficiency

To automate and streamline the management of services offered by the institution.

Ensure timely and accurate delivery of services by automating workflows, reducing human error, and enhancing internal coordination.

4. Facilitate Communication and Collaboration

To improve communication between the institution and its clients, as well as among internal teams.

Enable easy and consistent communication across various channels (email, SMS, push notifications) and ensure that all departments (sales, marketing, support) are aligned on customer needs and service progress.

5. Track and Monitor Service Performance

To track the progress and performance of services, monitor key metrics, and ensure compliance with service level agreements (SLAs).

Use reporting tools and dashboards to track the timeliness and quality of service delivery, identify areas for improvement, and maintain high standards of service.

6. Increase Customer Retention

To build long-term relationships and ensure high levels of customer satisfaction.

Use insights from CRM data to engage users, follow up on past interactions, and deliver added value that encourages repeat use of services, renewals, or long-term loyalty.

7. Automate Routine Tasks and Administrative Processes

To reduce the manual effort required for administrative tasks such as data entry, follow-up reminders, and scheduling.

Free up staff time for more value-added activities by automating repetitive processes like sending reminders, generating invoices, or updating user profiles.

8. Generate Insights and Analytics

To provide actionable insights into customer behavior, service usage, and operational efficiency.

Use analytics to uncover trends, understand customer preferences, optimize resource allocation, and make data-driven decisions regarding service offerings or marketing strategies.

9. Support Scalability and Growth

To provide a flexible and scalable system that can grow with the institution’s needs.

Ensure the CRM application can handle an increasing number of users, services, and data points as the institution expands, while maintaining performance and usability.

10. Facilitate Lead and Opportunity Management

To capture, track, and nurture leads (e.g., prospective students or clients) through the entire sales or onboarding process.

Improve conversion rates by managing leads efficiently, automating follow-up tasks, and ensuring that sales and support teams have the right information to close opportunities successfully.

anage services, improve customer interactions, and drive overall business success.

 **Centralize Data**

Provide a single source of truth for all customer and service information.

 **Enhance User Experience**

Deliver personalized, seamless experiences to customers and users.

 **Improve Efficiency**

Streamline service management, automate tasks, and improve operational efficiency.

 **Facilitate Communication**

Enable consistent and effective communication internally and with users.

 **Track Performance**

Monitor service quality and timeliness to ensure service excellence.

**OUTLINE PROCESS OF PROJECT**

Create object from spreadsheet

Create a screenflow flow for student admission application process

Create users

Create an approval process for property object

Create record triggered flow

Create a screenflow for existing student to book an appointment

Create lightning app page

**1. Centralize Customer and Service Data**

Actions

* Unified Database Create a central database where all client and service information (demographics, communication history, service requests, payment details) is stored.
* Integration Integrate the CRM with other institutional systems (e.g., learning management systems (LMS), payment gateways, student management systems) to automatically pull in relevant data.
* Customer Profiles Build detailed, up-to-date profiles for each client, which include personal information, service history, and interaction history (e.g., emails, calls, support tickets).

**Expected Outcome**

* A comprehensive, 360-degree view of each customer and service provided by the institution.
* Reduced risk of data silos, ensuring that all departments (e.g., admissions, support, marketing) can access consistent information.

**1. Create Object from Spreadsheet**

* **Purpose**: To import data from an external source (like an Excel spreadsheet) into Salesforce and create a new custom object based on that data.
* **Steps**:
  + Prepare the spreadsheet with the relevant data you want to import (e.g., student records, property details, etc.).
  + In Salesforce, navigate to **Setup** → **Object Manager** → **Create a Custom Object**.
  + Define the custom object's name and fields based on the columns in your spreadsheet.
  + Use **Data Import Wizard** or **Data Loader** to upload the data from the spreadsheet into Salesforce.
  + Outcome A custom Salesforce object that can store data from the spreadsheet, with fields and records populated automatically.

**2. Create a Screen Flow for Student Admission Application Process**

* **Purpose**: To build a user-friendly, guided application process for student admissions using Salesforce Flow (Screen Flow).
* **Steps**:
  + In Salesforce, navigate to **Setup** → **Flow** → **Create New Flow** → **Screen Flow**.
  + Add screens to guide the user through the admission process (e.g., Personal Information, Academic History, Document Upload).
  + Use the **Create Records** element to save the form data (student information) to a custom object like "Student Application".
  + Implement validation rules and decision elements to check if the application is complete before submission.
  + Outcome A smooth, step-by-step process for applicants to submit their admission applications, with data captured in Salesforce.

**3. Create Users**

* **Purpose**: To create new users in Salesforce who will interact with the system.
* **Steps**:
  + In **Setup**, go to **Users** → **Users** → **New User**.
  + Fill in the necessary fields like First Name, Last Name, Profile, Role, License Type, and User License.
  + Select appropriate permissions based on the role of the user (e.g., admin, student, admissions staff).
  + Assign a username and send login details via email.
  + **Outcome**: New users with appropriate permissions are added to Salesforce and can access relevant features based on their roles.

**4. Create an Approval Process for Property Object**

* **Purpose**: To create a formal approval workflow for property records, such as approving property listings, leases, or transactions.
* **Steps**:
  + In **Setup**, go to **Approval Processes** → **Create New Approval Process** → Select the "Property" object (or create a custom object if necessary).
  + Define the approval criteria (e.g., when a property record is submitted for approval).
  + Set up the approval steps, such as assigning approvers (e.g., property manager, admin).
  + Define the rejection or approval actions (e.g., update record status, send email alerts).
  + Activate the approval process.
  + Outcome: A structured approval flow for property-related records, which ensures that all necessary approvals are obtained before proceeding.

**5. Create Record-Triggered Flow**

* **Purpose**: To automatically trigger a flow when a record is created or updated in Salesforce, automating actions like sending notifications or updating fields.
* **Steps**:
  + In **Setup**, navigate to **Flow** → **New Flow** → Select **Record-Triggered Flow**.
  + Choose the object that will trigger the flow (e.g., Student Application).
  + Define the trigger conditions (e.g., when a new application is submitted or when a field is updated).
  + Add flow elements like **Create Records**, **Update Records**, or **Send Email** to perform actions when the conditions are met.
  + Set the flow to run either before or after the record is saved.
  + Activate the flow.
  + Outcome: Automates processes like data updates or notifications when certain conditions are met, improving efficiency.

**6. Create Screen Flow for Existing Student to Book an Appointment**

* **Purpose**: To allow students to book appointments with administrators, advisors, or support teams through a user-friendly interface.
* **Steps**:
  + In **Setup**, create a **Screen Flow** for appointment scheduling.
  + Add screens that allow the student to select available time slots, choose a service, and enter any additional details (e.g., reason for the appointment).
  + Use the **Create Records** element to create an appointment record in Salesforce (e.g., on a "Student Appointment" object).
  + Set up validation to ensure the student selects valid timeslots.
  + Use **Email Alerts** or **Notifications** to send confirmation emails to both the student and the advisor/administrator.
  + Outcome: A self-service portal for students to schedule appointments, making it easier to manage appointments and avoid scheduling conflicts.

**7. Create Lightning App Page**

* **Purpose**: To create a custom app page in Salesforce that displays components, records, and information relevant to specific users or teams.
* **Steps**:
  + In **Setup**, go to **App Manager** → **New Lightning App**.
  + Use the **App Builder** to create a new **Lightning App Page**.
  + Add different components to the app page, such as lists, reports, or custom components that are relevant to users (e.g., "Student Dashboard" for admissions).
  + Configure the layout to display the most important data and tools for the user.
  + Assign the app page to specific profiles or roles so that the right users can access it
  + Outcome: A tailored app page that provides users with relevant, actionable information in a customizable, user-friendly interface.

**Key Steps**

1. **Create Object from Spreadsheet**: Import data from external sources and create a custom Salesforce object to store it.
2. **Screen Flow for Student Admission**: Build an interactive, guided admission process that collects and submits student application data.
3. **Create Users**: Add users to the system with appropriate roles, profiles, and permissions.
4. **Approval Process for Property**: Implement a structured approval process for property records (e.g., listings, transactions) in Salesforce.
5. **Record-Triggered Flow**: Automate workflows triggered by record changes (e.g., sending alerts or updating fields when a student applies).
6. **Screen Flow for Appointment Booking**: Create an intuitive interface for students to book appointments with staff.
7. **Lightning App Page**: Design custom app pages in Salesforce to present users with relevant data and tools.

**Project process**

This project involves designing and automating key processes within a Salesforce environment to streamline operations and improve user experience.

The project begins by creating custom objects from external data sources, such as spreadsheets, ensuring that all relevant information is accurately imported and stored in Salesforce.

Next, a **Screen Flow** is designed for the student admission application process, providing a user-friendly, step-by-step interface for applicants to submit their information seamlessly.

Concurrently, new users are created with appropriate permissions and roles to ensure access control and proper functionality for different stakeholders (e.g., admissions staff, students).

An **Approval Process** is set up for managing property-related approvals, enabling structured workflows for reviewing and approving property records. Additionally, **Record-Triggered Flows** are implemented to automate key actions, such as sending notifications or updating records based on specific conditions (e.g., new student applications or property updates).

To further enhance student engagement, a **Screen Flow** is created to allow existing students to easily book appointments with advisors or support staff.

Finally, a **Lightning App Page** is developed to offer a customized dashboard, providing users with quick access to relevant data and tools. Through this combination of automation, custom workflows, and user-centric design, the project aims to optimize the student admission process, enhance operational efficiency, and deliver a seamless experience for both students and staff.

**Create Object from Spreadsheet**

**Purpose:**

To import external data (e.g., from an Excel or CSV spreadsheet) into Salesforce and create a custom object for storing this data.

**Steps:**

1. **Prepare the Spreadsheet**: Ensure the spreadsheet is well-structured with clear column headings that align with the fields needed in Salesforce.
2. **Create Custom Object**:
   * In **Salesforce Setup**, go to **Object Manager** and create a new custom object (e.g., "Student Application" or "Property Listing").
   * Define the necessary fields (e.g., Name, Address, Contact Information, Enrollment Date, etc.).
3. **Data Import**:
   * Use **Data Import Wizard** or **Data Loader** to upload the spreadsheet data into Salesforce.
   * Map the columns from the spreadsheet to the corresponding fields in the custom object.
   * Review the data after import to ensure accuracy and completeness.

### ****Create a Screen Flow for Student Admission Application Process****

#### ****Purpose****:

To create a guided, user-friendly process for students to submit their admission applications via a flow in Salesforce.

#### ****Steps****:

1. **Create Screen Flow**:
   * In **Salesforce Setup**, go to **Flow** and create a new **Screen Flow**.
2. **Define Flow Screens**:
   * Add a series of screens to guide students through the admission process (e.g., Personal Details, Academic History, Documents Upload, etc.).
   * Use **Screen Components** like text fields, picklists, and date pickers for collecting student information.
3. **Set Flow Logic**:
   * Add **Decision Elements** to validate input (e.g., ensure that required fields are filled out, or the application is complete).
   * Use **Create Records** element to save the student's data in the custom "Student Application" object.
4. **Activate the Flow**:
   * Activate the flow once all screens and elements are set up.

### ****Create Users****

#### ****Purpose****:

To create and manage users in Salesforce, providing access to different features based on their role (e.g., students, staff, or admins).

#### ****Steps****:

1. **Navigate to Users**:
   * In **Setup**, search for "Users" and select **Users** under the **Manage Users** section.
2. **Create New User**:
   * Click **New User**, and fill in essential details like First Name, Last Name, Username, Profile, Role, and License Type.
   * Assign the appropriate **User Profile** (e.g., Student, Admissions Staff, Admin) to control access to different parts of the system.
3. **Set Permissions**:
   * Based on the user's role, grant them permissions to view, edit, or manage certain records (e.g., only Admissions staff should be able to review applications).
4. **Send Login Credentials**:
   * After creating the user, Salesforce sends an email with login credentials and access information.

### ****Create an Approval Process for Property Object****

#### ****Purpose****:

To define a formal approval process for property records, ensuring that property-related actions (like listing approval) go through the proper review and approval stages.

#### ****Steps****:

1. **Navigate to Approval Processes**:
   * In **Salesforce Setup**, search for "Approval Processes" and select **Create New Approval Process**.
2. **Define Criteria**:
   * Choose the **Object** for the approval process (e.g., "Property").
   * Define the **Entry Criteria** (e.g., when a property record is submitted for approval).
3. **Approval Steps**:
   * Set up approval steps (e.g., Property Manager approval, Admin approval).
   * Choose approvers based on roles or specific users (e.g., Property Manager as the first approver).
4. **Define Actions**:
   * Set approval/rejection actions (e.g., send email notifications, update record status).
   * Optionally, set the **Rejection Actions** (e.g., send an email alert or update the status to "Rejected").
5. **Activate the Process**:
   * Once the process is configured, activate it to start using it.

### ****Create Record-Triggered Flow****

#### ****Purpose****:

To automate tasks in Salesforce based on the creation or update of records (e.g., when a student submits an application or a property is updated).

#### ****Steps****:

1. **Create a New Flow**:
   * In **Setup**, go to **Flow** and create a **Record-Triggered Flow**.
2. **Define Trigger Conditions**:
   * Select the object to trigger the flow (e.g., "Student Application" or "Property Listing").
   * Define conditions for when the flow should be triggered (e.g., when a record is created or updated).
3. **Add Flow Elements**:
   * Use **Create Records**, **Update Records**, **Send Email**, or **Decision** elements to automate actions like notifying the admissions team or updating the application status.
4. **Activate the Flow**:
   * Once configured, activate the flow so it runs automatically when the trigger conditions are met.

### ****Create Screen Flow for Existing Student to Book an Appointment****

#### ****Purpose****:

To allow students to schedule appointments with advisors or support staff through a guided flow.

#### ****Steps****:

1. **Create Screen Flow**:
   * In **Salesforce Setup**, create a **Screen Flow**.
2. **Design the Flow Screens**:
   * Add screens that allow students to select an appointment type, time slot, and reason for the appointment.
3. **Create Appointment Record**:
   * Use the **Create Records** element to create an appointment record (e.g., in a "Student Appointment" object).
4. **Validate Inputs**:
   * Ensure students choose valid time slots and provide necessary details (e.g., reasons for the appointment).

### ****Create Lightning App Page****

#### ****Purpose****:

To create a custom Lightning App Page that aggregates and displays key information for users in a user-friendly interface.

#### ****Steps****:

1. **Navigate to App Builder**:
   * In **Setup**, go to **App Manager** and create a **New Lightning App**.
2. **Create Lightning Page**:
   * Go to **Lightning App Builder** and create a new **Lightning App Page**.
3. **Add Components**:
   * Use standard or custom Lightning components (e.g., List Views, Reports, Record Details) to display relevant information like upcoming appointments, recent applications, or property listings.
4. **Configure Layout**:
   * Arrange components on the page to make it easy for users to find the information they need.
5. **Assign the App Page**:
   * Assign the app page to specific user profiles or roles so only the relevant users can access it.

Each step is designed to automate and streamline key processes in Salesforce, from importing data and creating users to automating tasks with flows, setting up approval processes, and providing a tailored interface through Lightning App Pages.

By implementing these steps, the project ensures efficient management of student applications, appointments, and property records, while providing a seamless and user-friendly experience for both students and staff.

**CONCLUSION**

this project aims to optimize and automate critical processes within Salesforce to enhance efficiency and user experience for an institution managing student admissions, property records and appointment scheduling.

By creating custom objects from external data sources, building interactive screen flows for student applications and appointment bookings, and automating key actions through record-triggered flows, the project ensures smooth and consistent workflows.

The introduction of approval processes guarantees that property-related actions go through the necessary review stages, while the creation of tailored Lightning app pages provides users with an intuitive, personalized interface.

Overall, these steps not only streamline administrative tasks, improve operational efficiency, and reduce manual errors but also empower students and staff with self-service capabilities and real-time access to critical information.

This comprehensive approach enhances both internal workflows and the overall user experience, positioning the institution to operate more effectively and deliver higher-quality services.

this project is a significantly more efficient and streamlined operational environment within the institution. By automating key processes such as student admission applications, appointment scheduling, and property approvals, the institution reduces manual work, minimizes errors, and accelerates service delivery.

The creation of custom objects and the integration of data from external sources ensures that all relevant information is easily accessible and properly managed within Salesforce.

The use of screen flows and record-triggered flows enhances user experience by providing intuitive interfaces for students and staff while automating actions based on specific conditions.

Additionally, the approval processes ensure that property records undergo a structured review and approval system, maintaining consistency and compliance. The custom Lightning app pages provide tailored dashboards that improve access to critical information and increase user productivity.

As a result, the institution is better equipped to handle its operations, provide superior service to students and stakeholders, and improve overall process efficiency.