A CRM Application To Manage The Services Offered By An Institution

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Project Abstract

EduConsultPro Institute, a prominent educational institution known for its wide range of courses and programs across various fields, is experiencing significant growth in the number of prospective students seeking admission. This increase has highlighted several challenges in managing the admission process, student inquiries, and consulting services efficiently. The current manual processes are time-consuming, prone to errors, and lead to delays, causing frustration for both students and staff. To address these challenges and streamline operations, EduConsultPro Institute has decided to implement Salesforce CRM. The comprehensive project will focus on automating the admission application process, implementing an approval workflow for consulting requests, managing consulting services and appointments, and tracking immigration cases. By leveraging the robust capabilities of Salesforce CRM, EduConsultPro Institute aims to significantly enhance the experience for prospective students and improve operational efficiency for admissions staff.

Requirements

1. **Admission Application Management** Proctive students can access the admission application form on the institute's website or portal. This form collects detailed information such as personal details, academic history, and qualifications. Once submitted, the applications are stored in Salesforce CRM. Students receive automated email notifications confirming their submission. Admissions staff can use Salesforce to generate reports and dashboards to analyze metrics like application volume, acceptance rates, and enrollment trends.
2. **Approval Process for Consulting Requests** In Salesforce, establish an approval process to review and approve consulting requests. Configure email alerts to inform relevant students whether their requests have been approved or rejected. Ensure that each consulting request is automatically submitted upon creation.
3. **Consulting Services Management** Prospective students should have the ability to request consulting services via the institute's website or portal. The consulting request form needs to capture essential student details, their consulting preferences, and the required areas of expertise. Once submitted, these consulting requests should be recorded in the Salesforce CRM system. Automated email notifications should be sent to consultants and advisors for new consulting requests. Within the Salesforce CRM

interface, consultants should be able to view, accept, and manage these requests. Scheduling of consulting appointments, including specifying the date, time, and purpose, should be facilitated through Salesforce. Additionally, the status of each appointment (such as scheduled, completed, or canceled) should be tracked and updated in Salesforce.

4. **Immigration Case Management** Students should have the capability to initiate immigration cases via phone, email, or the web. The immigration case submission form must capture all relevant case details and necessary information. Once submitted, these immigration cases should be recorded and stored in the Salesforce CRM system. Automated email notifications should be sent to immigration agents and case managers for new cases. Immigration agents should be able to view, process, and monitor these cases within the Salesforce CRM interface. The status of each case (such as open, in progress, or closed) should be tracked and updated within Salesforce. Additionally, document management and collaboration tools should be integrated to streamline case processing.

Creating Objects from Spreadsheets

In Salesforce, objects function as database tables designed to store data relevant to your organization. Each object consists of records (which are similar to rows) and fields (which are akin to columns), providing an organized structure for your data. These objects are essential for managing and interlinking different types of information, facilitating efficient data tracking, reporting, and analysis within the Salesforce environment. To create objects from spreadsheets in Salesforce, follow these steps:

1. Prepare Your Spreadsheet: Ensure your spreadsheet data is clean and well-organized. Each column should correspond to a field in Salesforce, and each row should represent a record.
2. Save the Spreadsheet: Save your spreadsheet in a compatible format, typically CSV (Comma Separated Values).
3. Log in to Salesforce: Access Salesforce and navigate to the setup menu.
4. Use the Data Import Wizard: In the setup menu, find the Data Import Wizard. Select the standard or custom object you want to create records for.
5. Upload Your Spreadsheet: Follow the wizard to upload your CSV file. Map the spreadsheet columns to Salesforce fields.
6. Start the Import: Review the mappings, and start the import process. Salesforce will create records based on your spreadsheet data, allowing you to manage and analyze it within the platform.

Course Object

The Course object plays a crucial role in our CRM application, tailored to manage the servicesprovided by an institution. It enables us to capture comprehensive details about each course, such as its description, duration,and linked instructors. By establishing a well-organized and centralized database for all course-related information, we can effectively monitor, manage, and evaluate the educational services offered. This improves our capability to deliver customized experiences to students and optimize administrative workflows.

Consultant Object

The Consultant object is a vital component of our CRM application, developed to oversee the services providedby an institution. It enables us to store comprehensive details about each consultant, including their areas of expertise, availability, and the coursesthey are assigned to.

Student Object

The Student object is a key element of our CRM application, designed to manage the servicesoffered by an institution. It enables us to store detailed information about each student, such as enrollment details, contact information, and course registrations. By keeping a well-structured repository of student data, we can effectively monitorstudent progress and tailor our communication to their needs.

Appointment Object

The Appointment object is integral to our CRM application designed to manage the services offered by an institution. It enables us to store detailed information about each appointment, including dates, times, participants, and purposes. By organizing and centralizing appointment data, we can efficiently schedule and track meetings, ensure timely follow-ups, and optimize resource allocation. This enhances our ability to provide timely and effective services

Creating a ScreenFlow for Student Admission Application Process

The ScreenFlow for the Student Admission Application Process is a powerful feature in your CRM application designed to manage an institution's services. It optimizes the entire admission process by automating data collection, course selection, and record creation. This automation minimizes manual data entry errors, saves time, and ensures a uniform process for all applicants. Additionally, it provides instantfeedback and communication with prospective students,enhancing their overall experience. By centralizing and organizing data, the institution can more effectively manage student information, monitor admissions, and offer customized educational services. This results in improved operational efficiency and superiorservice delivery.

Start the Flow: Begin by creating a new Screen Flow in Salesforce Flow Builder. This will be the starting point of the admission process.

a. Student Info Screen

Drag a "Screen" element onto the canvas and name it "Student Info."
Add fields to collect student information, such as: 1. Text fields for Name, Email,Phone Number.
 2. Picklist for Gender.
 3. Date field for Date of Birth.
 Configure the screen fields as required.
 Click "Done."

b. Create Student Record

 i. Drag a "Create Records" element onto the canvas and name it "Create Student Record."
  ii. Set "How Many Records to Create" to "One."
 iii.Set "How to Set the Record Fields" to "Use separate resources, and literal values."
vi.Select the "Student" object.
v.Map the screen input fields to the corresponding Student object   fields.
vi. Click "Done."

c. Course Screen

i. Drag another "Screen" element onto the canvas and name it "Course Screen."
ii. Add a picklist field for courseselection with optionslike IELTS, GRE, GMAT, Duolingo, and TOEFL.
iii.Configure the screen field as required.
iv. Click "Done."

d. Selecting Course Decision

i. Drag a "Decision" element onto the canvas and name it "Selecting Course."
ii. Create decision outcomes based on the selected course:
 1. "Selected IELTS"
 2. "Selected GRE"
 3. "Selected GMAT"
 4. "Selected Duo lingo"
 5. "Selected TOEFL"
iii. Configure the decision criteria for each outcome based on the selected course picklist value.
iv. Click "Done."

e. Course-Specific Records

 i. For each possible course, follow these steps:

f. IELTS:

 Drag a "Get Records" element onto the canvas under the "Selected IELTS" path and name it "Get IELTS Rec."

Select the IELTS object and set criteria to fetch relevant records.
Click "Done."
Drag a "Create Records" element onto the canvas and name it "Create IELTSRegistration Rec."
Set "How Many Records to Create" to "One."
Select the IELTS Registration object.
Map the necessary fields and use the fetched records.
Click "Done."

g.GRE

Repeat the steps similarto IELTS but for GRE
Name the elements "Get GRE Rec" and "Create GRE Registration Rec."
Select the GRE and GRE Registration objects.

h.GMAT

Repeat the steps similarto IELTS but for GMAT
Name the elements"Get GMAT Rec"and "Create GMAT Registration Rec."
Select the GMAT and GMAT Registration objects.

i.Duolingo

Repeat the steps similarto IELTS but for Duo lingo
Name the elements "Get Duo lingo Rec" and "Create Duo lingo Registration Rec."
Select the Duolingo and Duo lingo Registration objects.

j.TOEFL

Repeat the steps similarto IELTS but for TOEFL
Name the elements"Get TOEFL Rec" and "Create TOEFL Registration Rec."
Select the TOEFL and TOEFLRegistration objects.

k. Send Confirmation Email

Drag an "Action" element onto the canvas and name it "Send Email to Student."
Select "Send Email" as the action type.
Configure the email template, recipient address (use the email collected from the student), and any other necessary details. Click "Done."

l. Success Screen

Drag a final "Screen" element onto the canvas and name it "Success Screen."
Add a display text component to inform the student that their registration has been successful.
Click "Done."

Connecting the Elements

Connect the elements in the order described:
a. Start → Student Info → Create Student Record → Course Screen → Selecting

Course.

b. From the "Selecting Course" decision, branch to each specific course path (IELTS,GRE, GMAT, Duolingo,TOEFL).

c. Each course path will then connect to the "Send Email to Student" action.

d. Finally, connect the "Send Email to Student" action to the "Success Screen."

Creating Users and Configuring User Settings in Salesforce

In a CRM application for managing services offered by an institution, creating and configuring user settings is a crucial task to ensure that all users have the appropriate access and capabilities to perform their roles effectively.

Configuring User Settings:

1. Edit User Details

To modify an existinguser's details. Update the necessary fields and settings as described above.

2. Assign Permission Set

Permission sets grantadditional permissions beyondthose defined by the user.Navigate to "Permission Sets" in the Setup menu. Assign the relevant permission sets to the user.

3. Profile and Role Adjustments

Profiles control what users can see and do in Salesforce. Roles control the level of access users have to data based on the organization. Adjust these settings as needed to ensure users have the appropriate access.

Approval Process for Appointment Object

In this project, we have implemented a structured approach to creating and managing email templates in Salesforce. First, we enabled Lightning Email Templates by navigating to Setup, using the Quick Find box to locate "Templates," and toggling on the Lightning Email Templates option.

Creating a Record triggered flow

The "EduConsultPro Approval Flow " is a Record-Triggered Flow designed to automate theapproval process for appointment requestswithin the EduConsultPro system. This flow is triggered immediately upon the creation or update of a record, ensuring that the approval process begins without delay.

The "EduConsultPro Approval Flow" is a critical component in automating and optimizing the appointment approval processwithin the EduConsultPro system. Its implementation ensures efficient, consistent, and real-time processing of appointment requests, ultimately contributing to improved operational performance and resource management.

ScreenFlow for ExistingStudent to Book an Appointment

This ScreenFlow facilitates the process for existing students to book appointments or create cases within an educational consultancy system. The flow initiates by retrieving and displaying student information, then directs the student based on their choice of booking an appointment or creating a case.

Combining All Flows into a SingleFlow

This combined ScreenFlow integrates the processes for managing both existing and new students within an educational consultancy system. It starts by welcoming the user and then directs them based on whether they are an existing student or a new student. This approach ensures a seamless and unified experience for all students

Creating a Lightning App Page

To create a customized home page in Salesforce for your project, start by navigating to the Lightning App Builder through Setup. Enter "App Builder" in the Quick Find box, and click on "Lightning App Builder." Begin the process by clicking "New" and selecting "Home Page," then proceed by naming the page "EduConsultPro Home Page." Choose the Standard Home Page template and finalize this step by clicking "Done."

Next, drag the Flow component into the top-right region of the page. Search for the specific flow named "EduConsultantPro Flow" and save your changes. To make this page functional and accessible, click "Activate," and assign it to the appropriate apps and profiles. Choose the Sales app, then assign it to the "System Administrator" profile. After reviewing your selections, click "Save" to complete the setup.

This process is essential for your project as it customizes the user interface, integrates key components like the "EduConsultantPro Flow," and ensures that the relevant stakeholders, such as system administrators, have streamlined access to vital functionalities within the CRM. This setup enhances the overall efficiency and user experience of the EduConsultPro application.