

# **A CRM Application to Manage the Services offered by an Institution**

By

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## Abstract

The **EduConsultPro** Institute is one of these leading educational institutes that annually presents a greater quantity of various courses and programs for an increasing quantity of prospective students. The service standards need effective management in admissions management, student inquiries, and expert consulting to keep them in a high position. This project will entail the design and implementation of a comprehensive CRM application using Salesforce to support this process better and improve the experience of students and admissions staff alike. The solution will consist of features in admission application management, consulting services management, and immigration case management, among others. *Admission Application Management* will enable prospects to make applications online and for the admission staff to trace and scrutinize the applications through automated notifications. *Consulting Services Management* will help students create their request for expert advice, while consultants can schedule and manage their appointments with much ease. The Immigration Case Management will provide information on immigration related questions and cases. Some features of this system include automated workflows, email notifications, comprehensive dashboards, and collaboration tools. **EduConsultPro** Institute has now revamped pages for their prospective students, which are smooth, transparent, and easily navigated, all made possible through the use of Salesforce CRM. The sole concept, however, is developing operational efficiencies with an increased throughput in the admission process through consulting services. Now, this project aligns not just with things up front but provides a nice platform for scalable and future-fit growth.

## Index Page

Topic	Page No
1. Title	1
2. Abstract	2
3. Introduction	4
4. Create Objects from Spreadsheet	5
5. Create a ScreenFlow for Student Admission Application process	8
6. Create Users	10
7. Create an Approval Process for Property Object	12
8. Create a Record Triggered Flow	15
9. Create a ScreenFlow for Existing Student to Book an Appointment	16
10. Create a ScreenFlow to Combine all the flows at one place	18
11. Create a lightning app page	20
12. Final Outputs	21

# INTRODUCTION

EduConsultPro Institute, a prestigious educational establishment, is committed to improving the management of its admission processes, consulting services, and immigration case handling. As the institute experiences a rise in student applications and service requests, it recognizes the need for a more efficient and integrated solution to address these challenges.

To enhance operational efficiency and provide a seamless experience for both prospective students and admissions staff, EduConsultPro Institute is turning to Salesforce CRM. This initiative will streamline various processes, including the handling of admission applications, consulting requests, and immigration cases, all within a single, cohesive CRM platform.

## **The project will involve:**

- **Developing a user-friendly admission application system** that allows prospective students to apply online, with automated notifications and detailed reporting for admissions staff.
- **Creating an efficient approval workflow** for consulting requests, including automated email alerts and a streamlined submission process.
- **Managing consulting services** by enabling students to request consultations, schedule appointments, and track service statuses within Salesforce.
- **Handling immigration cases** by allowing students to initiate cases through multiple channels, manage documents, and track case progress with integrated tools.

Include the likes of setup of Salesforce objects, development of custom flows, designing for unified app pages, and more in lightning. These changes should be targeted at bringing a clearer and more smooth experience for the concerned users who are going through the processes of admission and consultation.

## **Task - 1**

### **Create Objects from Spreadsheet**

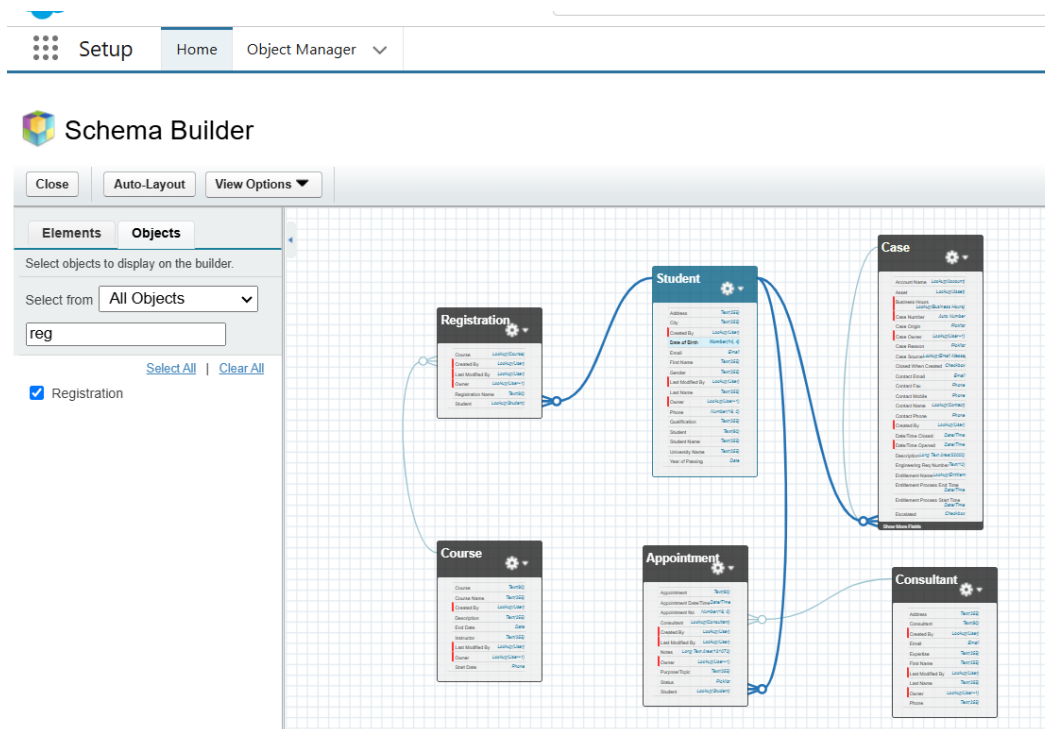
The outcome is enhanced services management at EduConsultPro Institute for which Salesforce functionality is leveraged to enable creation of objects directly from the spreadsheets. This will make it easier to integrate existing data in Salesforce and effectively manage the same for several institutional requirements.

Many objects were done using the spreadsheets given by the institution to solve the assignment. Course, Consultant, and Student, and Appointment are the objects designed, one representing a critical working of an institution. The lookup relationships between the said objects will ensure the design integrity and smooth navigation of data. At this point, lookup relationships were created between Appointment and Student and Appointment and Consultant.

A new Registration object was created to hold student and course information and set up the lookup relationship on either an immigration or visa application regarding student queries between Student and Case.

It was set up to model the data regarding the requirement of the institution. For every new object, after that, tabs were created that would act as easy accesses. The Case object further customized Specified values entered for the "Type" field were Immigration and Visa Application those for "Status" were Open and In- progress. A new Lightning application, EduConsultPro, was developed that aggregates all these elements: home, students, courses, advisers, appointments, registrations, and cases. The interface was largely optimized for user experience between the system administrator and staff members, so it guaranteed proficient, effective, and transparent administration of all aspects of service within the Salesforce instance at the EduConsultPro Institute.

## Screenshots:



Lookup relationship among Objects

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Case

Details

**Fields & Relationships**

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Case Status Picklist Values

Action	Values	API Name	Closed	Default	Chart Colors	Modified By
Edit   Deactivate	New	New	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assigned dynamically	YELLETI SAI TEJA, 27/10/2024, 9:53 am
Edit   Del   Deactivate	Working	Working	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	YELLETI SAI TEJA, 27/10/2024, 9:53 am
Edit   Del   Deactivate	Escalated	Escalated	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	YELLETI SAI TEJA, 27/10/2024, 9:53 am
Edit   Del   Deactivate	Closed	Closed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	YELLETI SAI TEJA, 27/10/2024, 9:53 am
Edit   Del   Deactivate	Open	Open	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	YELLETI SAI TEJA, 27/10/2024, 12:53 pm
Edit   Del   Deactivate	In-progress	In-progress	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	YELLETI SAI TEJA, 27/10/2024, 12:53 pm

Inactive Values

No inactive values defined.

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Case

Details

**Fields & Relationships**

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

**Field Dependencies** [New](#) [Field Dependencies Help](#)

No dependencies defined.

**Validation Rules** [New](#) [Validation Rules Help](#)

No validation rules defined.

**Case Type Picklist Values** [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Case Type Picklist Values Help](#)

Action	Values	API Name	Default	Chart Colors	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Mechanical	Mechanical	<input type="checkbox"/>	Assigned dynamically	YELLETI SAI TEJA, 27/10/2024, 9:53 am
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Electrical	Electrical	<input type="checkbox"/>	Assigned dynamically	YELLETI SAI TEJA, 27/10/2024, 9:53 am
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Electronic	Electronic	<input type="checkbox"/>	Assigned dynamically	YELLETI SAI TEJA, 27/10/2024, 9:53 am
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Structural	Structural	<input type="checkbox"/>	Assigned dynamically	YELLETI SAI TEJA, 27/10/2024, 9:53 am
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Other	Other	<input type="checkbox"/>	Assigned dynamically	YELLETI SAI TEJA, 27/10/2024, 9:53 am
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Immigration	Immigration	<input type="checkbox"/>	Assigned dynamically	YELLETI SAI TEJA, 27/10/2024, 12:52 pm
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Visa Application	Visa Application	<input type="checkbox"/>	Assigned dynamically	YELLETI SAI TEJA, 27/10/2024, 12:52 pm

## Configuring the Case Object

Lightning App Builder App Settings Pages EduConsultPro ? Help

**App Settings**

App Details & Branding

App Options

Utility Items (Desktop Only)

**Navigation Items**

User Profiles

**Navigation Items**

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

**Available Items** [Create](#)

Type to filter list...

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods

**Selected Items**

- Registrations
- Student
- Course
- Cases
- Appointment
- Consultant

## Adding items to EduConsultPro

## Task - 2

### Create a ScreenFlow for Student Admission Application process

The EduConsultPro Student Flow simplifies the registration process for students by creating a more user-friendly application. I added the Screen element, represented as a "**Student Info**," which was there to carry all the information that pertained to the student. Therefore, I created a record variable known as **StudentRecordRes** to view the fields from the student object and present a very light experience when getting data.

Next, I developed a Create element named "**Create Student Record**" to enable saving the student record input to the Salesforce database. Then I included a "**Course Screen**" by including a second Screen element. The primary choice found in the screen is a picklist named "**Select Course**". The course options that may be selected are *IELTS, GRE, GMAT, Duolingo, and TOEFL*.

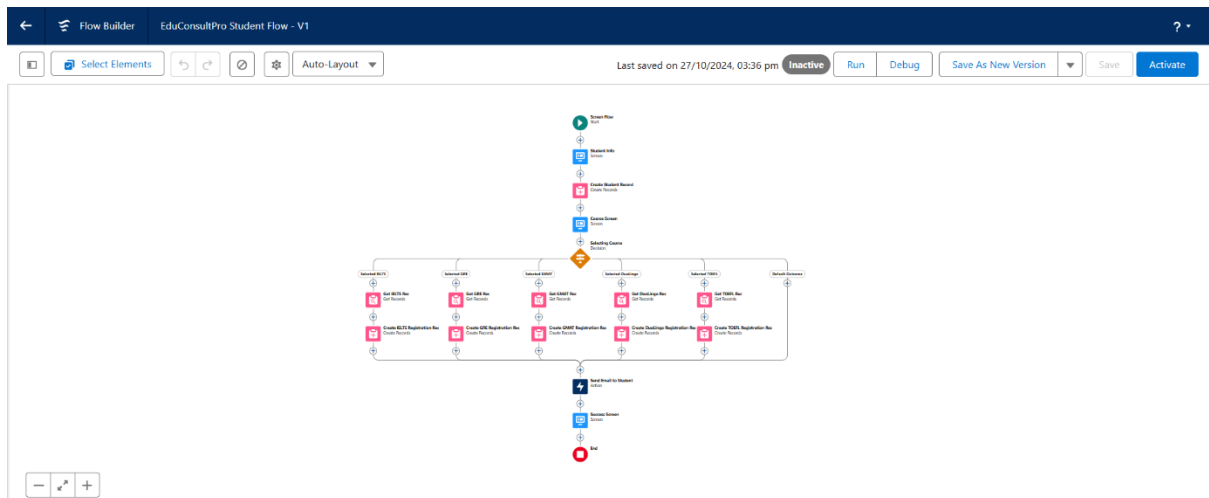
Added a Decision element known as "**Selecting Course**" to manage course selection. This checks the course selected and then directs the flow of action regarding the selection. Based on the selection made, under the condition of the choice, a Get Record element gets the related course record from the "**Course**" object so that registration is done correctly.

After collecting the course data that was needed, a Create Records element was leveraged to make a registration record in the "**Registration**" object, associating the selected course with all the information that student gave to me. I then made Text Template Resources for the body and subject of the email to add the message that would be sent to the student ensuring that they had properly registered and sought to join the platform.

I then added an Action element titled "**Send Email to Student**" for sending this email—including the capability to fill in the email with provided student details any time the process is run. To exit the process system, I added an Screen element titled "**Success Screen**" and then added a message, "Registration has been completed successfully," with advice to students to check their emails for details. This flow will be named hence: "**EduConsultPro Student Flow**."



## Screenshots:



EduConsultPro Student Flow

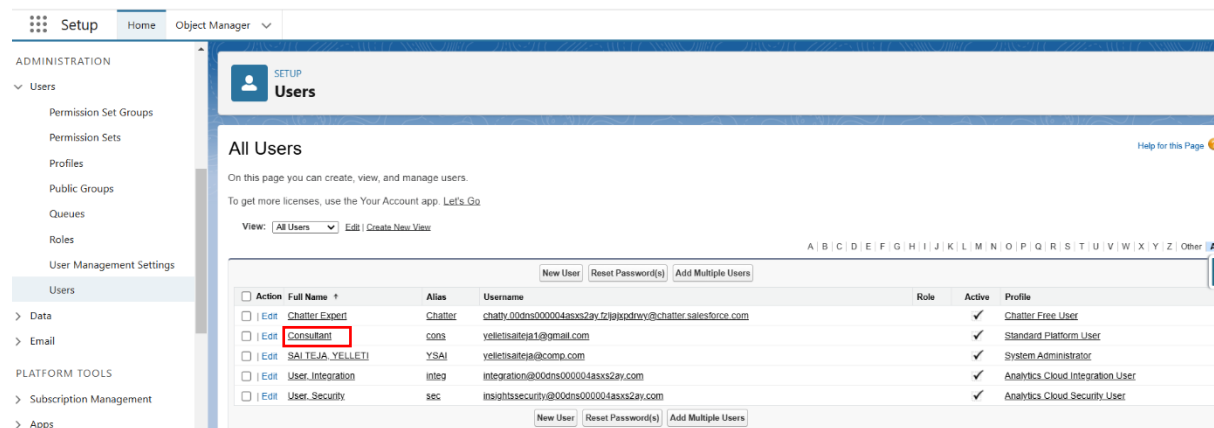
## Task - 3

### Create Users

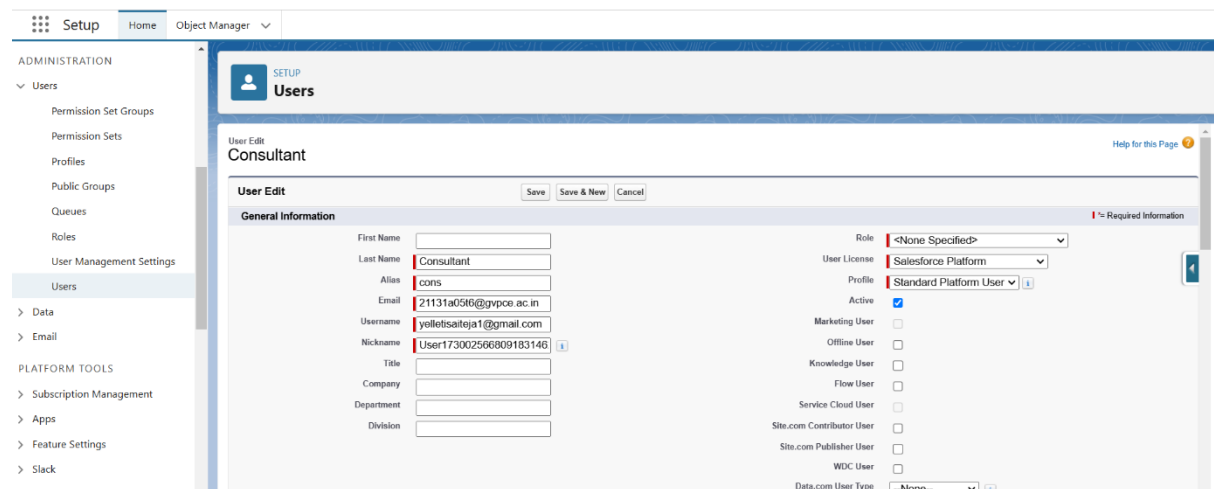
Created new user in Salesforce by navigating to Setup→Administrative→ Users→New User. Entered "Consultant" for the second name and entered "Salesforce Platform" as the license type. I applied the profile "Standard Platform User," checked all required fields for data, and saved the record of the new user.

Configured user settings: Browse to Setup → Administration → Users → Edit the user profile. Scrolled down to the Approver Settings section, Selected "Consultant" in the Manager Field, At the bottom of the screen, click Save.

### Screenshots:



### Creating a user named Consultant



### Configure the User Settings

## **Task - 4**

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

Created email template in Salesforce. From Setup, I input "Templates" in the Quick Find box and clicked on "Lightning Email Templates", and clicked the toggle to on. Opened the App Launcher, searched for "Email Templates" from the search box, and saved. Created a new folder with the desired name. Created an new email Template and selected the new created folder. The specified text got pasted into the HTML Value to create this, in my case, "Submission Template" Designed two more email templates for approving and rejecting requests, ditto the first one.

Earlier, I did set up the approval process. I went to Setup and typed "Approval" in the Quick Find box, and clicked on "Approval Processes." I selected to manage approval processes for "Appointment" and clicked "Create New Approval Process" using the Jump Start Wizard. I named the process "Appointment Approval" and under the approver settings, I used the setting "Option Automatically assign an approver using a standard or custom hierarchy field" of "Manager." I set the "Next Automated Approver Determined By" field to "Manager."

Made the following changes to the Record Editability Properties: Prepended "Administrator OR the currently assigned approver" to the list Saved the process and checked out the form Made a new Field Update under the Initial Submission Actions with Name "Submitted" and configured it to make the update to the field "Appointment: Status" with "Pending"

Also created a new Email Alert type "Submission Email Alert," auto-populate the Unique Name, selected the "Submission Template" Email Template, selected the recipient type to the user's Name. Repeated that for the Final Approval and Final Rejection actions and set those two up the same way.

Screenshots:

Email Template

Approval Template

Details

Related

Information

Email Template Name

Approval Template

Description

Made in Email Template Builder

Related Entity Type

Folder

Email template folder

Message Content

Subject

Enhanced Letterhead

HTML Value

Dear {{{Appointment\_c.Student\_Name\_c}}},  
  
I am pleased to inform you that your request for an appointment regarding {{{Appointment\_c.PurposeTopic\_c}}} has been approved. Here are the confirmed details:  
  
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 have any additional questions before our meeting.  
  
Looking forward to a productive session.  
  
Best regards,  
  
{{{Recipient.Name}}},  
EduConsultantPro

Additional Information

Created By

YELLETI SAI TEJA, 27/10/2024, 4:34 pm

Last Modified By

YELLETI SAI TEJA, 27/10/2024, 4:34 pm

Approval Email Template

Email Template

Rejection Template

Details

Related

Information

Email Template Name

Rejection Template

Description

Made in Email Template Builder

Related Entity Type

Folder

Email template folder

Message Content

Subject

Enhanced Letterhead

HTML Value

Dear {{{Appointment\_c.Student\_Name\_c}}},  
  
Thank you for your interest in scheduling an appointment regarding {{{Appointment\_c.PurposeTopic\_c}}}. Unfortunately, I am unable to accommodate this request at this time.  
  
If you have any questions or need assistance in another way, please feel free to reach out to me. I am committed to supporting your goals and will do my best to provide alternatives where possible.  
  
Best regards,  
  
{{{Recipient.Name}}},  
EduConsultantPro

Additional Information

Created By

YELLETI SAI TEJA, 27/10/2024, 4:34 pm

Last Modified By

YELLETI SAI TEJA, 27/10/2024, 4:34 pm

Rejection Email Template

Email Template

Submission Template

Details

Related

Information

Email Template Name

Submission Template

Description

Made in Email Template Builder

Related Entity Type

Appointment

Folder

Email template folder

Message Content

Subject

Appointment Request with EduConsultPro Consultant

HTML Value

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}}},

EduConsultPro

Enhanced Letterhead

Additional Information

Created By

YELLETI SAI TEJA, 27/10/2024, 4:24 pm

Last Modified By

YELLETI SAI TEJA, 27/10/2024, 4:47 pm

## Submission Email Template

Setup

Home

Object Manager

approval

approval

Mass Transfer

Approval Requests

Process Automation

Approval Processes

Didn't find what you're looking for?

Try using Global Search.

Approval Processes

Initial Submission Actions

Action

Type

Description

Edit | Remove

Record Lock

Lock the record from being edited

Edit | Remove

Field Update

Submitted

Edit | Remove

Email Alert

Submission Email Alert

Approval Steps

Action

Step Number

Name

Description

Criteria

Assigned Approver

Reject Behavior

Show Actions

Edit

1

Step 1

Manager

Final Rejection

Final Approval Actions

Action

Type

Description

Edit

Record Lock

Lock the record from being edited

Edit | Remove

Email Alert

Approved Email Alert

Edit | Remove

Field Update

Approved

Final Rejection Actions

Action

Type

Description

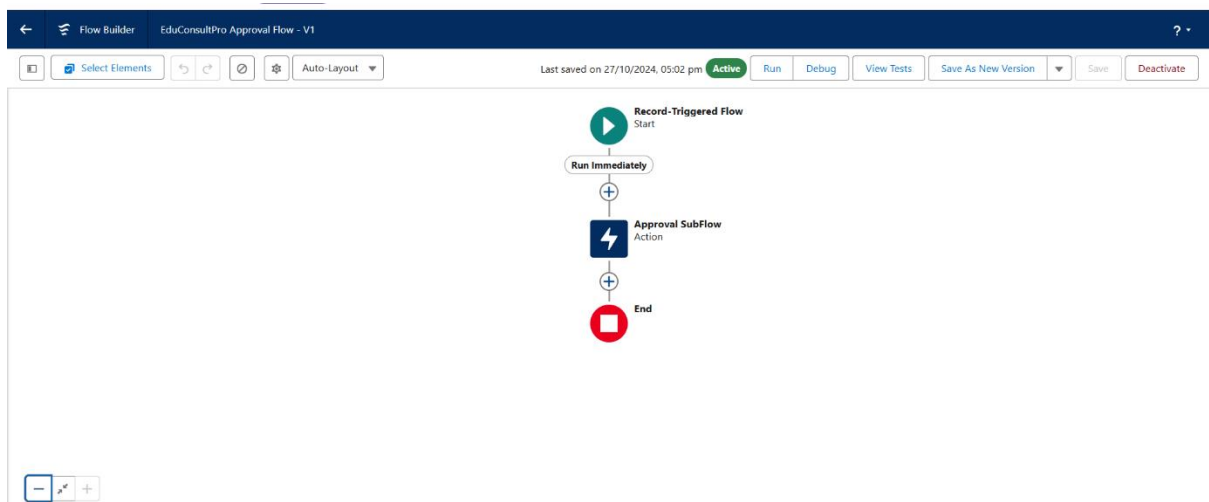
## Creating Approval Processes

## Task - 5

### Create a Record Triggered Flow

Created a record-triggered flow in Salesforce for appointment approvals. Set the flow trigger to 'When a record is created' on an appointment record and added an action element that would submit the record for approval. Label this Action element as "Approval SubFlow" and set RecordId to "{!\$Record.Id}". At this point, the flow was saved with the label "EduConsultPro Approval Flow" and activated.

### Screenshots:



EduConsultPro Approval Flow

## **Task - 6**

### **Create a ScreenFlow for Existing Student to Book an Appointment**

Configured an end-to-end flow in Salesforce for student appointments and cases management.

Added a Screen element called "Get Student Info" to collect the student's name and email, and added a GET Record element to retrieve student details depending on the name and email collected.

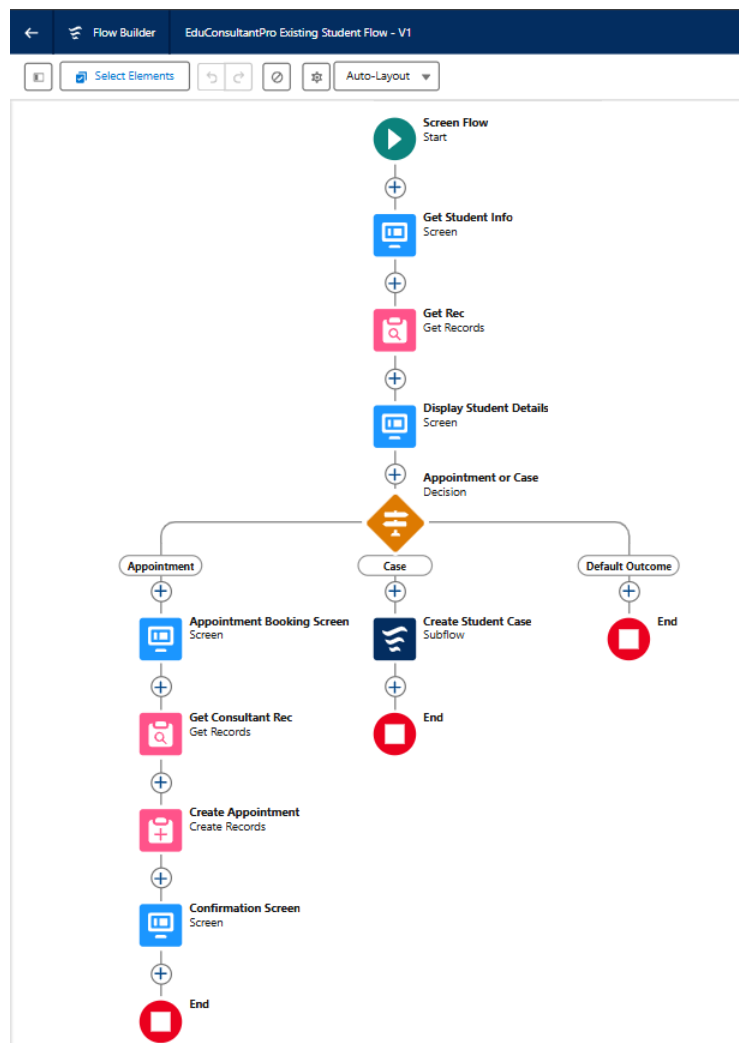
Added a Decision element to route between "Appointment" and "Case" depending upon the student's wishes. Added a Screen element labeled "Appointment Booking Screen" to gather details for appointments in case an appointment has been booked.

Inserted a GET Record element to obtain consultant details based on the selected name of the consultant. Applied a Create Records element to create a new appointment record with appropriate details.

Added a Screen element and named it "Confirmation Screen" to let the student see details of the appointment confirmation.

Added a Subflow element for case management and named it "Create Student Case" for creation of a case. Finally, save the flow as "EduConsultantPro Existing Student Flow" and prepare for deployment.

## Screenshots:



EduConsultantPro Existing Student Flow



## Task - 7

### Create a ScreenFlow to Combine all the flows at one place

A new Screen Element in the flow was added labelled as "Welcome Screen". Inside this screen, a Display Text component was added and was labelled as "SuccessMessage."

Entered the given text into the Resource Picker box so that the welcome message by EduConsultantPro describes the services and support it provided. Added another Screen Element following the Welcome Screen, labeled "Existing or New Student Confirmation Screen."

Added a Radio Button component with the label "Are you an Existing Student?" Created two choices: "Yes" and "No." Then added an Action Element of type Decision and named it "Decision 1," placing it next to the Existing or New

Student Confirmation Screen. Set up the decision criteria with the outcome labeled "If Existing Student." The condition will be when the resource

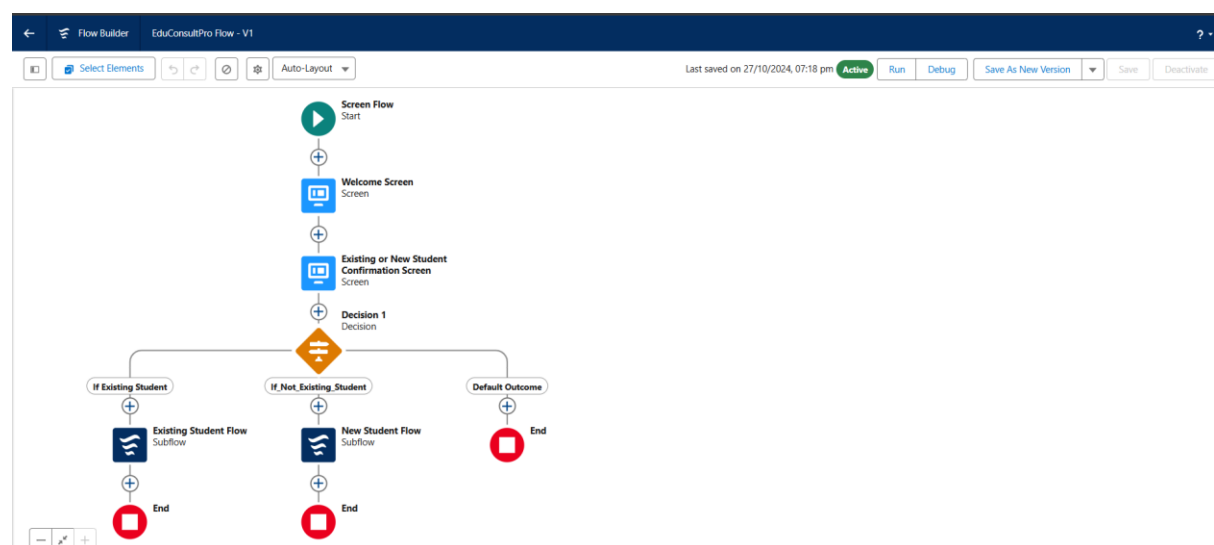
{!Are\_you\_a\_Existing\_Student} is equal to the value {!Yes}. Added the second outcome for "No."

Inserted a Subflow Element in the "If Existing Student" path and selected "EduConsultantPro Existing Student Flow" and labelled it as "Existing Student Flow." Saved the flow under the name "EduConsultantPro Existing Student Flow."

Inserted another Subflow Element in the "If Not an Existing Student" path, selecting the "EduConsultantPro Student Flow" and labeling it "New Student Flow." Saved this flow with the name "EduConsultPro Flow."

Finalized by saving the entire flow, naming it "EduConsultPro Flow."

### Screenshots:



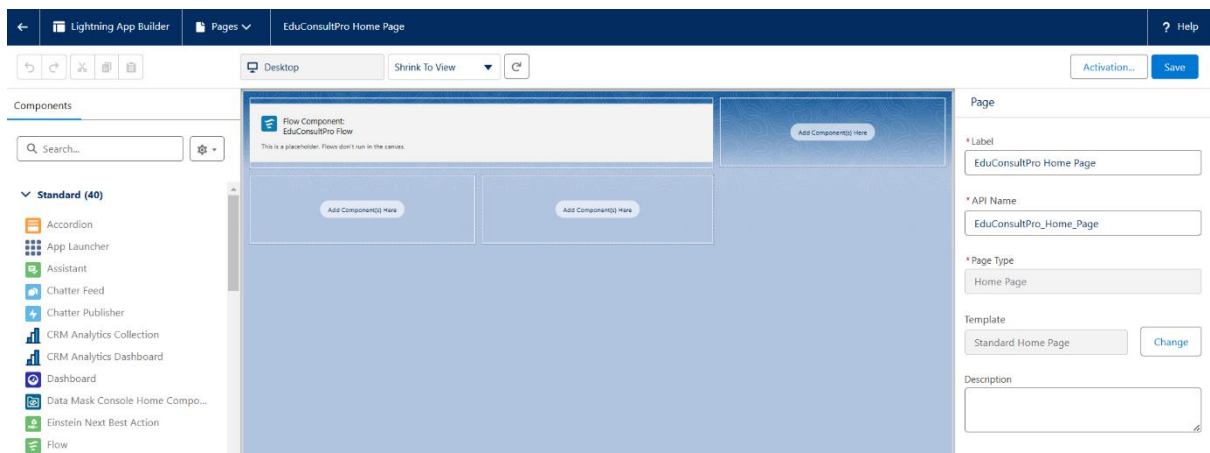
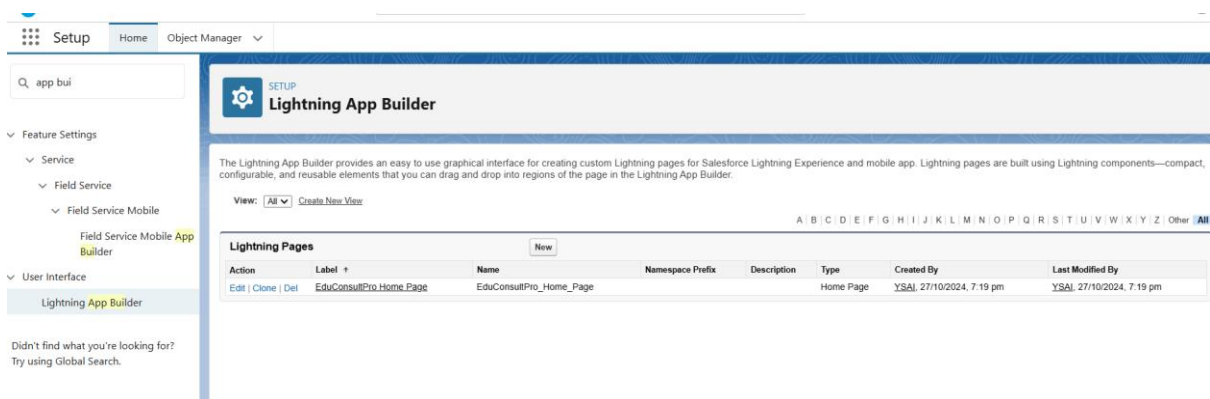
EduConsultPro Flow

## Task - 8

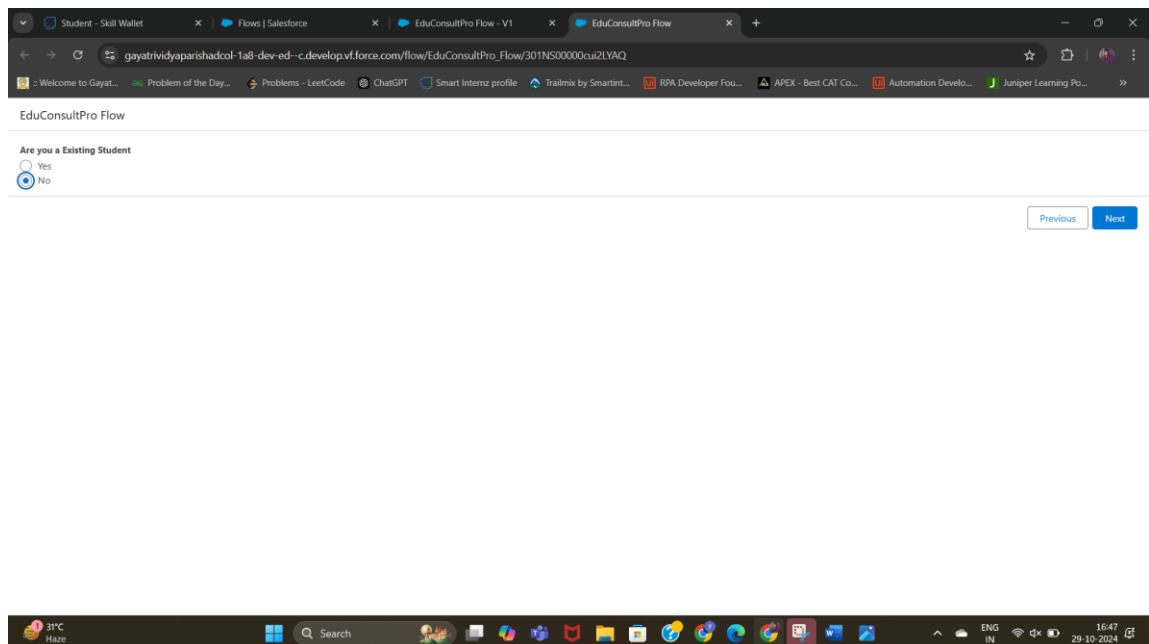
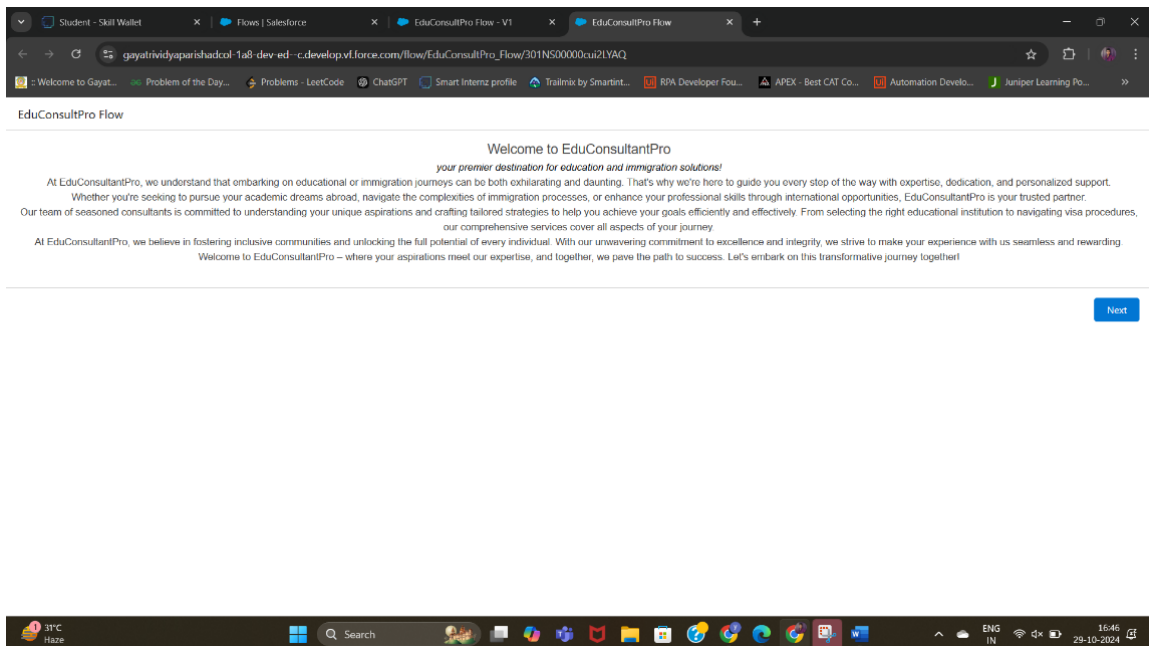
### Create a lightning app page

Created and configured a Lightning App Page named "EduConsultPro Home Page" using the Standard Home Page template. Placed the Flow component in the top-right region and incorporated the "EduConsultantPro Flow." Activated the page and assigned it to the Sales app and the System Administrator profile, ensuring it was available for the designated users.

### Screenshots:



# Final Outputs



Student - Skill Wallet x Flows | Salesforce x EduConsultPro Flow - V1 x EduConsultPro Flow

gayatrividyaaparishadcol-1a8-dev-ed--c.develop.vf.force.com/flow/EduConsultPro\_Flow/301NS00000cui2LYAQ

Welcome to Gayat... Problem of the Day... Problems - LeetCode ChatGPT Smart Internz profile Trailmix by Smartint... RPA Developer Fou... APEX - Best CAT Co... Automation Develo... Juniper Learning Po...

### EduConsultPro Flow

Student Name

First Name

Last Name

Date of Birth

Email

Qualification

Phone

University Name

Year of Passing

Previous Next

31°C Haze Search 16:49 29-10-2024

Student - Skill Wallet x Flows | Salesforce x EduConsultPro Flow - V1 x EduConsultPro Flow

gayatrividyaaparishadcol-1a8-dev-ed--c.develop.vf.force.com/flow/EduConsultPro\_Flow/301NS00000cui2LYAQ

Welcome to Gayat... Problem of the Day... Problems - LeetCode ChatGPT Smart Internz profile Trailmix by Smartint... RPA Developer Fou... APEX - Best CAT Co... Automation Develo... Juniper Learning Po...

### EduConsultPro Flow

Student Name  
Yelleti Sai Teja

First Name  
Yelleti

Last Name  
Sai Teja

Date of Birth  
1,50,42,004.0000

Email  
21131a056@gvpce.ac.in

Qualification  
B.Tech

Phone  
8,79,05,04,199

University Name  
Gayatri Vidya Parishad College of Engineering(Autonomous)

Year of Passing  
31/05/2025

Previous Next

31°C Haze Search 16:51 29-10-2024

