

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.

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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.

Task1

Create Objects from Spreadsheet

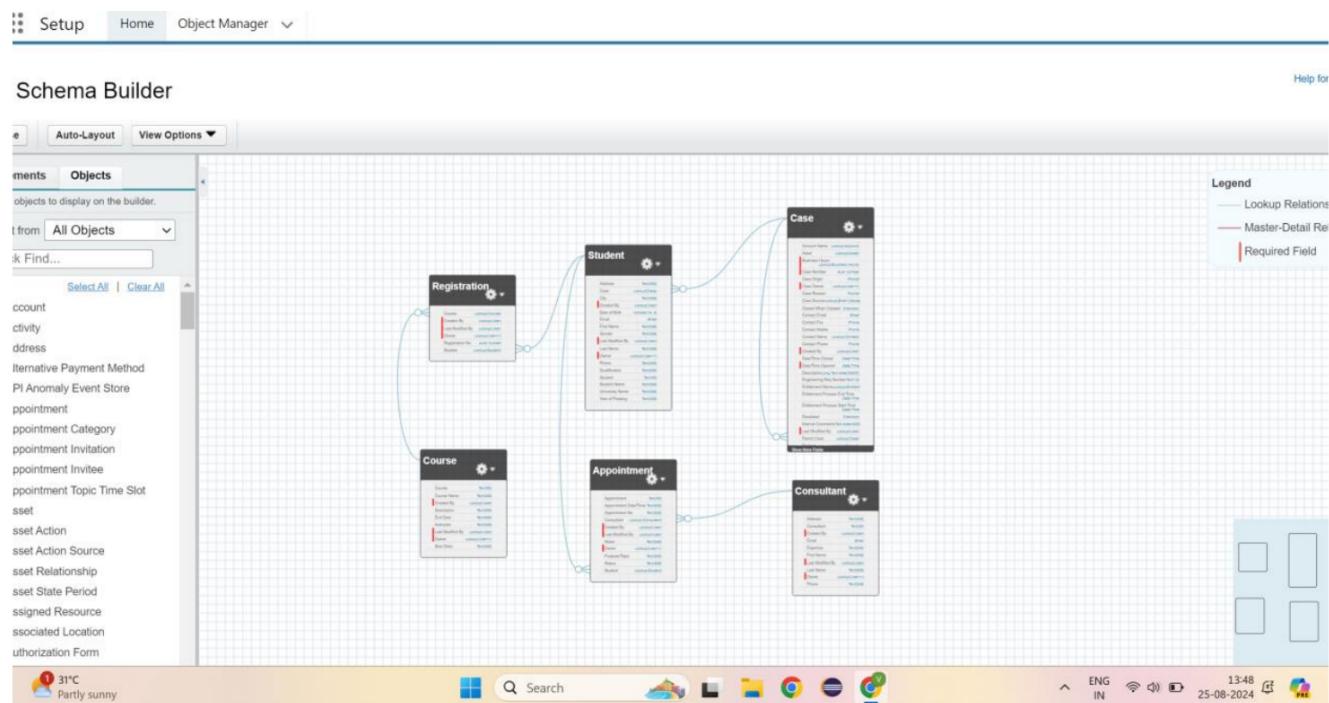
The outcome is enhanced services management at EduConsultPro Institute for which Salesforce functionality is leveraged to enable creation of objects directly from the spreadsheets. This will make it easier to integrate existing data in Salesforce and effectively manage the same for several institutional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

The screenshot shows the Lightning App Builder in Salesforce. The left sidebar includes sections for App Settings (App Details & Branding, App Options, Utility Items (Desktop Only)), Navigation Items (User Profiles), and a code editor with the line "javascript:void();". The main area is titled "Navigation Items" and shows a list of available items on the left and selected items on the right. Available items include: Home, Account Brands, Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, Asset Action Sources, Asset Actions, Asset State Periods, Assets, Async Operation Logs, Authorization Form, Authorization Form Consent, Authorization Form Data Rule, Case, Cases, Course - Course, Consultant - Consultant, registrations, and Student - Student. The selected items list contains Home, Appointment - Appointment, Cases, Course - Course, Consultant - Consultant, registrations, and Student - Student. Navigation bar tabs at the top include Welcome to the Salesforce Virt, Student - Skill Wallet, EduConsultPro - Lightning App, Object creator, and ChatGPT.

Adding items to EduConsultPro

Welcome to the Salesforce Virt... | Student - Skill Wallet | App Manager | Salesforce | Object creator | ChatGPT

dabicom-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Setup Home Object Manager

Search Setup

Lightning Experience App Manager

23 Items > Sorted by App Name • Filtered by All appmenitems - tabSet Type, App Type

App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visible in ...
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	26/08/2024, 11:56 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	26/08/2024, 11:56 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	26/08/2024, 11:56 am	Lightning	✓
5 Community	Community	Salesforce CRM Communities	26/08/2024, 11:56 am	Classic	✓
6 Content	Content	Salesforce CRM Content	26/08/2024, 11:56 am	Classic	✓
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	26/08/2024, 11:56 am	Lightning	✓
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	26/08/2024, 11:56 am	Lightning	✓
9 EduConsultPro	EduConsultPro		26/10/2024, 2:53 pm	Lightning	✓
10 Hive	hive		26/08/2024, 11:56 am	Community	✓
11 Hive App	Hive_App		26/08/2024, 11:56 am	Lightning	✓
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	26/08/2024, 11:56 am	Lightning	✓
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	26/08/2024, 11:56 am	Classic	✓
14 Platform	Platform	The fundamental Lightning Platform	26/08/2024, 11:56 am	Classic	✓
15 Queue Management	QueueManagement	Create and manage queues for your business.	26/08/2024, 11:56 am	Lightning	✓
16 Sales	Sales	The world's most popular sales force automation (SFA) solution	26/08/2024, 11:56 am	Classic	✓
17 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	26/08/2024, 11:56 am	Lightning	✓
18 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	26/08/2024, 11:56 am	Lightning	✓
19 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	26/08/2024, 11:56 am	Classic	✓
20 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	26/08/2024, 11:59 am	Lightning	✓
21 Service	Service	Manage customer service with accounts, contacts, cases, and more	26/08/2024, 11:56 am	Classic	✓
22 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen	26/08/2024, 11:56 am	Lightning	✓

https://dabicom-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Type here to search

34°C Mostly sunny 13:32 ENG 29-10-2024

EduConsultPro Lightning App

Welcome to the Salesforce Virt... | Student - Skill Wallet | Case | Salesforce | Object creator | ChatGPT

dabicom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Type/view

Setup Home Object Manager

Search Setup

Case

Field Information

Field Label	Type	Field Name	Type
Data Type	Picklist		
Help Text			
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Picklist Values Used

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Mechanical	Mechanical	☐	Assigned dynamically	shahina.shah, 26/08/2024, 11:56 am
Edit Del Deactivate	Electrical	Electrical	☐	Assigned dynamically	shahina.shah, 26/08/2024, 11:56 am
Edit Del Deactivate	Electronic	Electronic	☐	Assigned dynamically	shahina.shah, 26/08/2024, 11:56 am
Edit Del Deactivate	Structural	Structural	☐	Assigned dynamically	shahina.shah, 26/08/2024, 11:56 am
Edit Del Deactivate	Other	Other	☐	Assigned dynamically	shahina.shah, 26/08/2024, 11:56 am
Edit Del Deactivate	Immigration	Immigration	☐	Assigned dynamically	shahina.shah, 29/10/2024, 2:49 pm
Edit Del Deactivate	Visa-Application	Visa-Application	☐	Assigned dynamically	shahina.shah, 29/10/2024, 2:49 pm

Field Dependencies

No dependencies defined

Validation Rules

No validation rules defined.

Case Type Picklist Values

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Mechanical	Mechanical	☐	Assigned dynamically	shahina.shah, 26/08/2024, 11:56 am
Edit Del Deactivate	Electrical	Electrical	☐	Assigned dynamically	shahina.shah, 26/08/2024, 11:56 am
Edit Del Deactivate	Electronic	Electronic	☐	Assigned dynamically	shahina.shah, 26/08/2024, 11:56 am
Edit Del Deactivate	Structural	Structural	☐	Assigned dynamically	shahina.shah, 26/08/2024, 11:56 am
Edit Del Deactivate	Other	Other	☐	Assigned dynamically	shahina.shah, 26/08/2024, 11:56 am
Edit Del Deactivate	Immigration	Immigration	☐	Assigned dynamically	shahina.shah, 29/10/2024, 2:49 pm
Edit Del Deactivate	Visa-Application	Visa-Application	☐	Assigned dynamically	shahina.shah, 29/10/2024, 2:49 pm

Inactive Values

No Inactive Values values defined.

Type here to search

34°C Mostly sunny 13:40 ENG 29-10-2024

Configuring the Case Object

Task2

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.

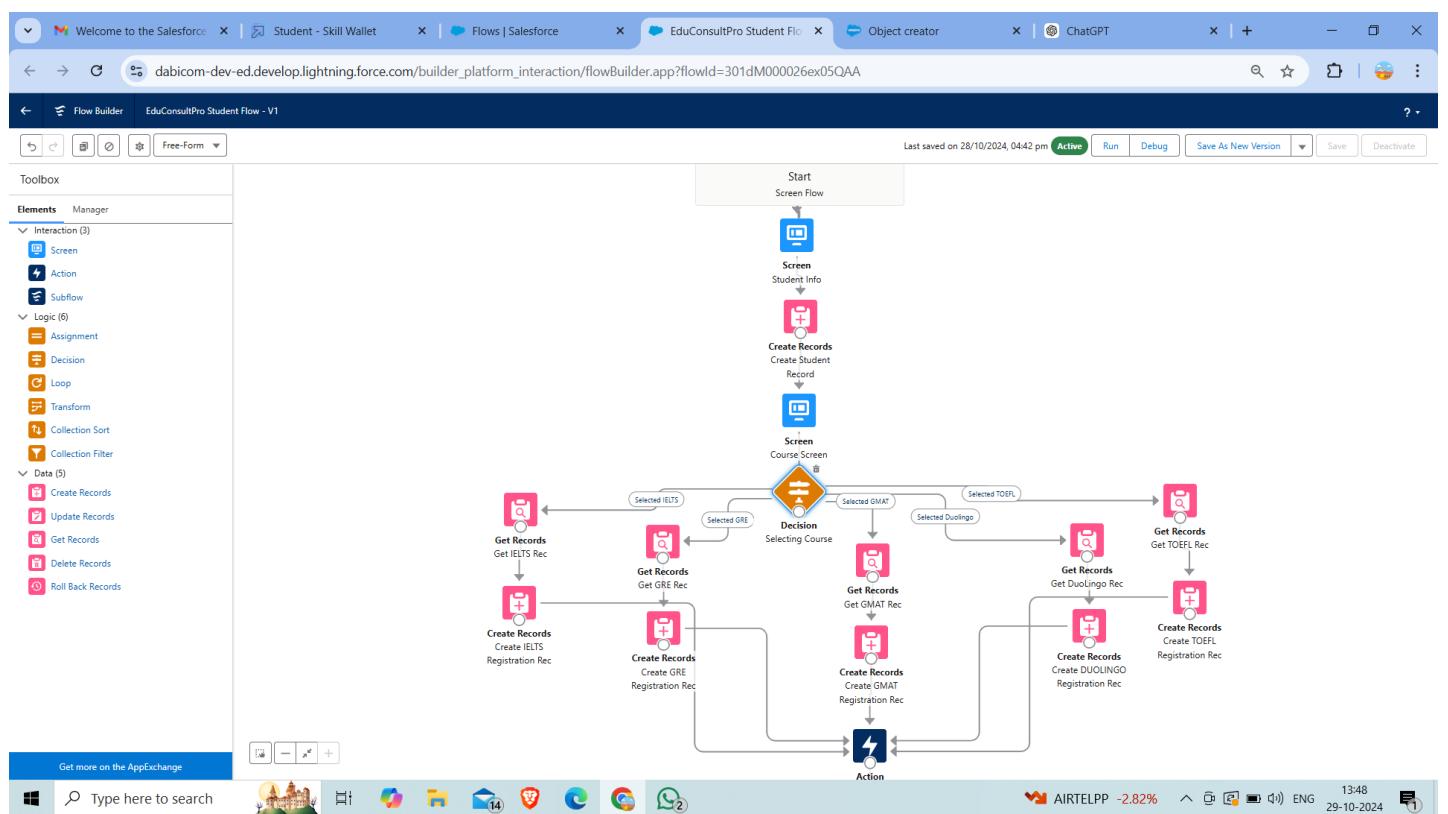
Next, I developed a Create element named "**Create Student Record**" to enable saving the student record input to the Salesforce database. Then I included a "**Course Screen**" by including a second Screen element. The primary choice found in the screen is a picklist named "**Select Course**". The course 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**."

Screenshot:



EduConsultPro Student Flow

Task3

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.

The screenshot shows the Salesforce 'All Users' page. The left sidebar is expanded to show 'Users' under 'User Management Settings'. The main area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table includes rows for 'Chatter_Feed', 'consultant', 'Grey_Jane', 'shak_shahna', 'User_Integration', and 'User_Security'. The 'Profile' column shows various profiles like 'Chatter Free User', 'Standard Platform User', etc. The 'Active' column has checkboxes, some of which are checked. The 'Role' column shows roles like 'SF Admin'. The 'Action' column contains edit links for each user. At the bottom of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

User

The screenshot shows the 'User' creation page in Salesforce. The left sidebar is expanded to show 'Users' under 'User Management Settings'. The main area is divided into several sections: 'Mailing Address' (Street, City, Zip/Postal Code, State/Province, Country), 'Single Sign On Information' (Federation ID), 'Locale Settings' (Time Zone, Locale, Language), and 'Approver Settings' (Delegated Approver, Manager). In the 'Approver Settings' section, the 'Manager' field is populated with 'consultant' and the 'Receive Approval Request Emails' dropdown is set to 'Only if I am an approver'. At the bottom of the page, there are 'Save' and 'Save & New' buttons.

Configure the User Settings

Task4

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 a 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 Templates

Recent
3 items

Email Template Name	Description	Folder	Last Modified By	Last Modified Date
Rejectoin Template		EduConsultantPro	shahina shaik	28/10/2024, 7:35 pm
Approval Template		EduConsultantPro	shahina shaik	28/10/2024, 7:31 pm
Submission Template		EduConsultantPro	shahina shaik	28/10/2024, 6:01 pm

SETUP

Approval Processes

Entry Criteria
Record Editability: Administrator ONLY

Approval Assignment Email Template: Initial Submitters: Appointment - Appointment Owner
Created By: shahina shaik, 28/10/2024, 7:56 pm
Modified By: shahina shaik, 28/10/2024, 8:30 pm

Initial Submission Actions

Action	Type	Description
Edit Remove	Email Alert	Lock the record from being edited
Edit Remove	Field Update	Submission Email Alert submitted

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Step 1			Manager	Final Rejection

Final Approval Actions

Action	Type	Description
Edit Remove	Email Alert	Lock the record from being edited
Edit Remove	Field Update	Approval Email Alert approved

Final Rejection Actions

Action	Type	Description
Edit Remove	Email Alert	Unlock the record for editing
Edit Remove	Field Update	Rejection Email Alert rejected

Recall Actions

Action	Type	Description
Edit Remove	Record Lock	Unlock the record for editing

Approval Process

Task5

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.

Screenshot:

The screenshot shows the Salesforce Flow Builder interface. The URL in the browser is dabicom-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301dM000026gdzmQAA. The flow is titled "EduConsultPro Approval Flow - V1".

The flow diagram consists of a "Start" node (Record-Triggered Flow) connected to an "Action" node (Approval SubFlow). The "Action" node has a "Run Immediately" button above it. The "Approval SubFlow" action is labeled "Approval SubFlow" and has a lightning bolt icon.

The "Start" node details:

- Object: Appointment - Appointment
- Trigger: A record is created
- Optimize for: Actions and Related Records
- Add Scheduled Paths (Optional)
- Open Flow Trigger Explorer for Appointment...

The "Action" node details:

- Action

The left sidebar contains the "Toolbox" with categories: Interaction (3), Logic (6), Data (4). The "Interaction" category is expanded, showing Action, Subflow, and Custom Error.

EduConsultPro Approval Flow

Task6

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.

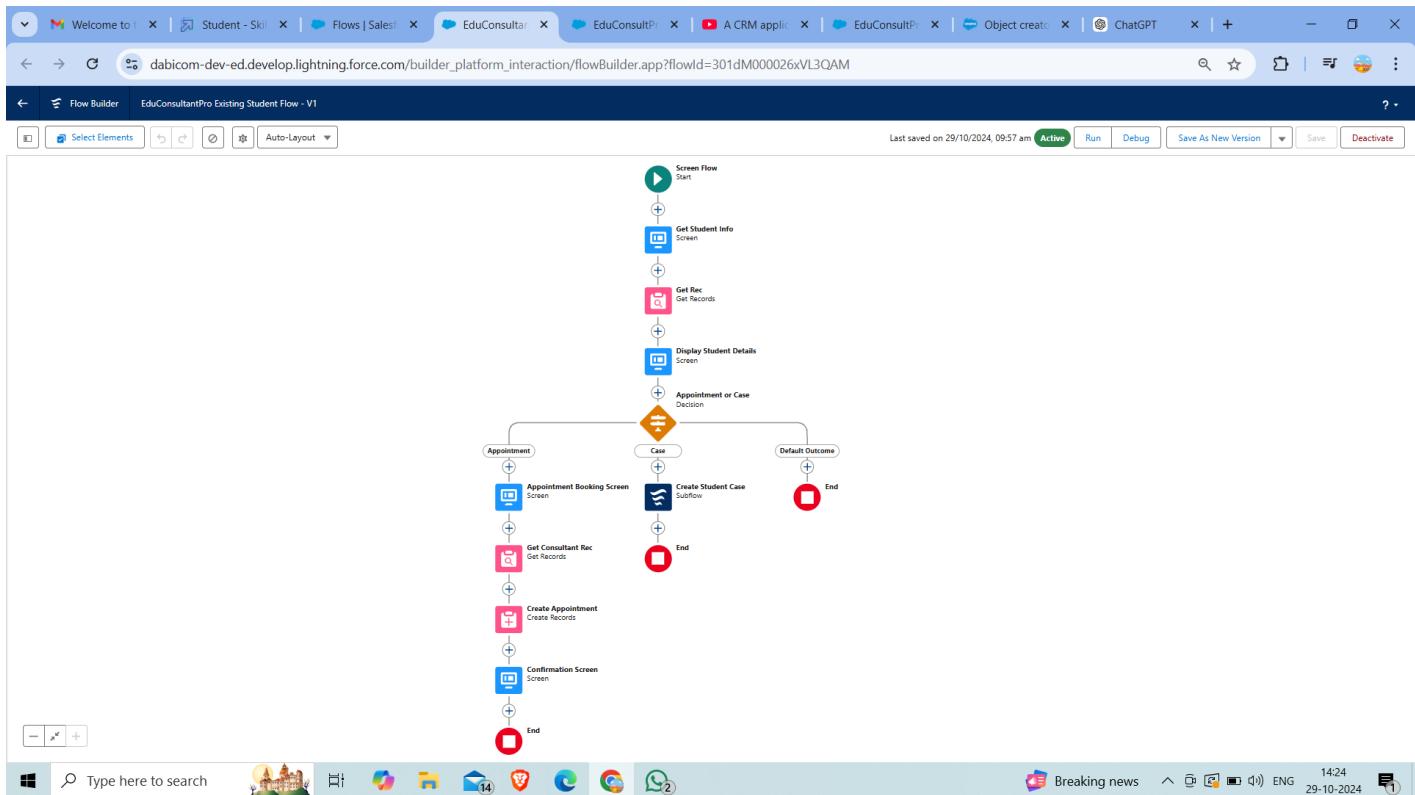
Added a Decision element to route between "Appointment" and "Case" depending upon the student's wishes. Added a Screen element labeled "Appointment Booking Screen" to gather details for appointments in case an appointment has been booked.

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.

Screenshot :



EduConsultantPro Existing Student Flow

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."

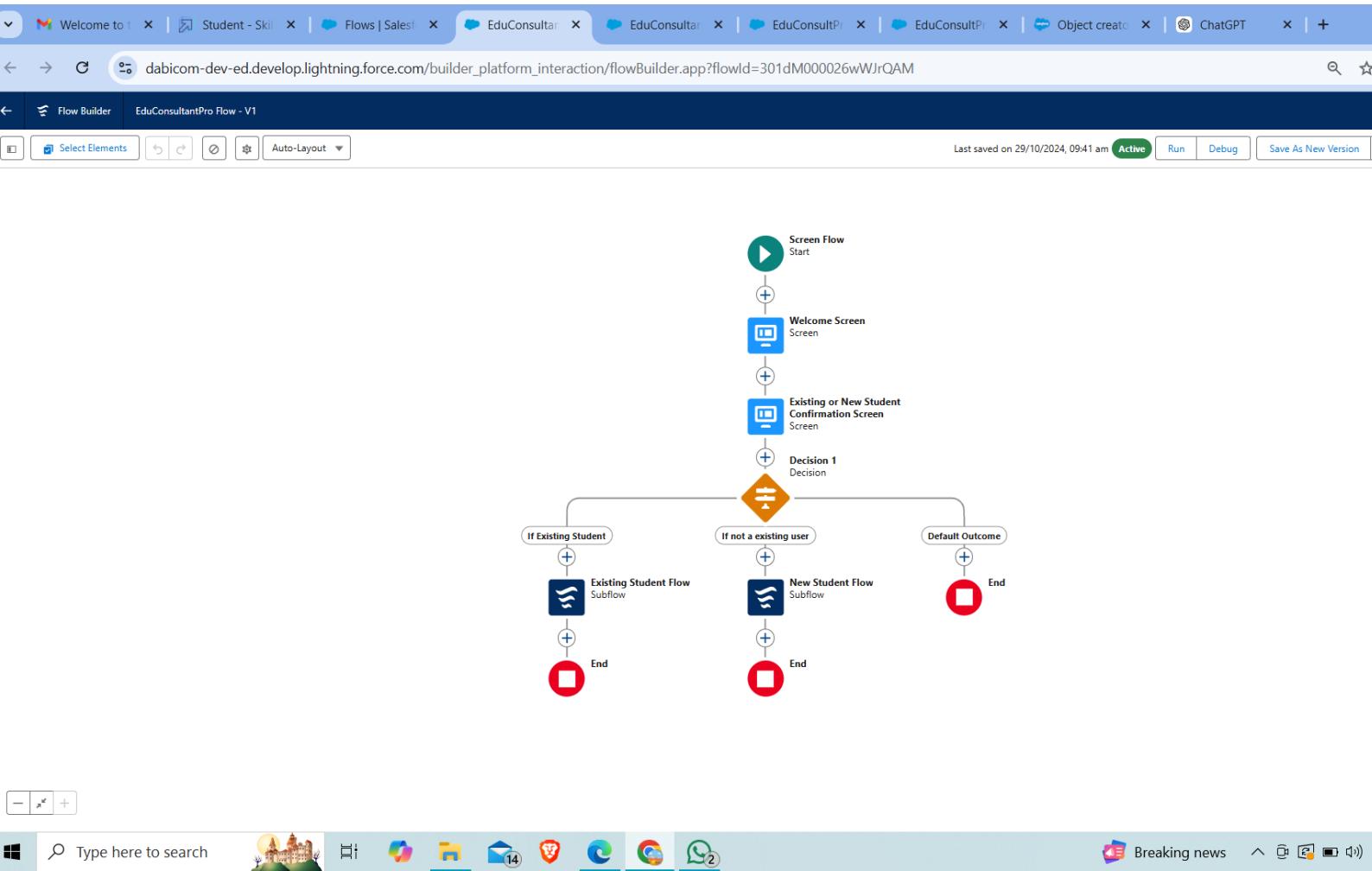
Added a Radio Button component with the label "Are you an Existing Student?" Created two choices: "Yes" and "No." Then added an Action Element of type Decision and named it "Decision 1," placing it next to the Existing or New Student Confirmation Screen. Set up the decision criteria with the outcome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

Screenshot:



EduConsultPro Flow

Create a lightning app page

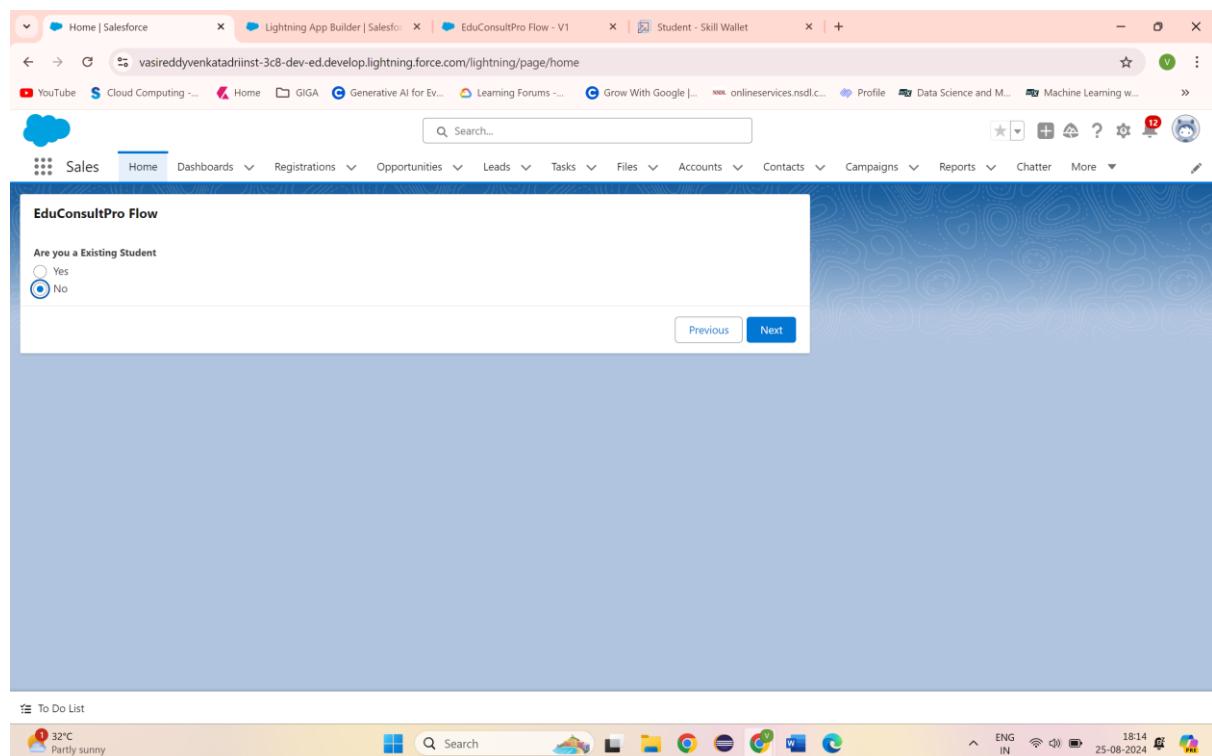
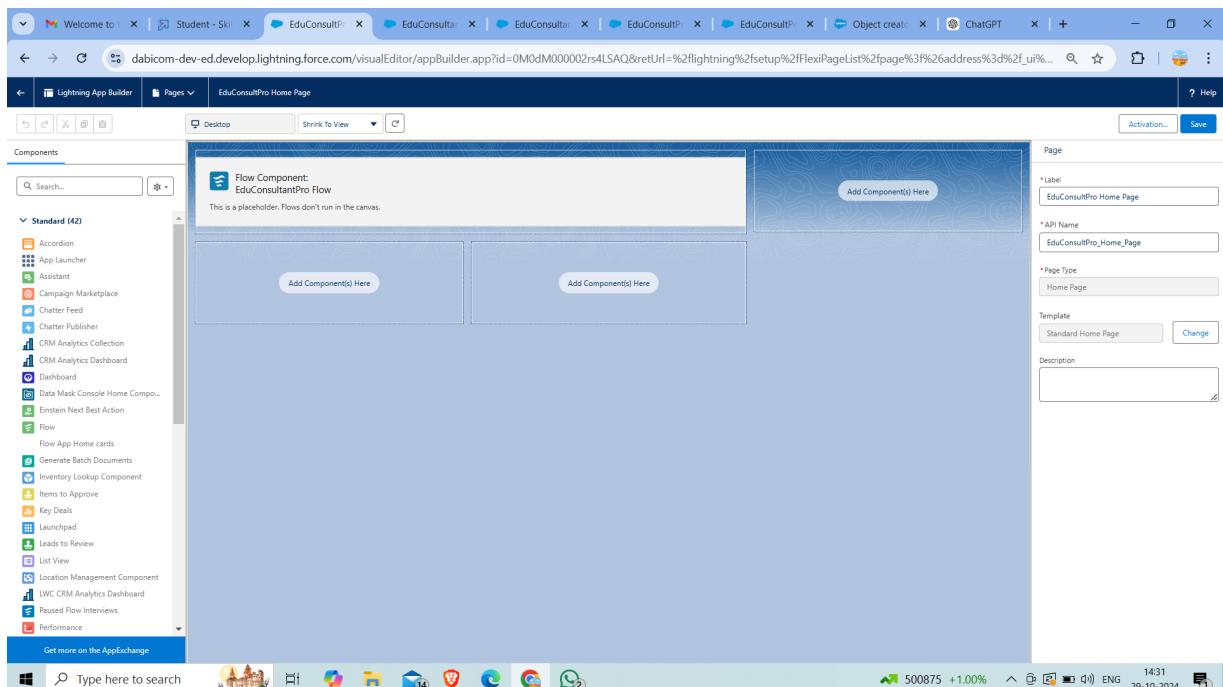
Created and configured a Lightning App Page named "EduConsultPro Home Page" using the Standard Home Page template. Placed the Flow component in the top-right region and incorporated the "EduConsultantPro Flow." Activated the page and assigned it to the Sales app and the System Administrator profile,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

Screenshots:

The screenshot shows the Salesforce Lightning App Builder interface. The left sidebar has sections for Feature Settings (Service, Field Service, Field Service Mobile), User Interface (Lightning App Builder), and Global Search. The main area is titled 'Lightning App Builder' and shows a list of 'Lightning Pages'. The table has columns for Action, Label, Name, Namespace Prefix, Description, Type, Created By, and Last Modified By. There are three entries:

Action	Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
Edit Clone Del	EduConsultPro_Home_Page	EduConsultPro_Home_Page			Home Page	sahai	29/10/2024, 10:07 am
Edit Clone Del	Hive_Provider_Home_Page	Hive_Provider_Home_Page			Home Page	sahai	26/08/2024, 11:56 am
Edit Clone Del	Resource_Record_Page	Resource_Record_Page			Record Page	sahai	26/08/2024, 11:56 am

Execution Screenshots:



Salesforce Home | Lightning App Builder | EduConsultPro Flow - V1 | Student - Skill Wallet

vasireddyvenkatadriinst-3c8-dev-ed.develop.lightning.force.com/lightning/page/home

YouTube Cloud Computing Home GIGA Generative AI for Ev... Learning Forums... Grow With Google... onlineservices.nsdl.c... Profile Data Science and M... Machine Learning w...

Search...

Sales Home Dashboards Registrations Opportunities Leads Tasks Files Accounts Contacts Campaigns Reports Chatter More

EduConsultPro Flow

Address

City

Year of Passing

University Name

Student Name

Qualification

Phone

Student

Last Name

To Do List

32°C Partly sunny

Search

ENG IN 18:14 25-08-2024

Salesforce Home | Lightning App Builder | EduConsultPro Flow - V1 | Student - Skill Wallet

vasireddyvenkatadriinst-3c8-dev-ed.develop.lightning.force.com/lightning/page/home

YouTube Cloud Computing Home GIGA Generative AI for Ev... Learning Forums... Grow With Google... onlineservices.nsdl.c... Profile Data Science and M... Machine Learning w...

Search...

Sales Home Dashboards Registrations Opportunities Leads Tasks Files Accounts Contacts Campaigns Reports Chatter More

7993850387

Student

IT Leaders

Last Name

Kurra

Gender

Female

First Name

Vedasri

Email

kurravedasri@gmail.com

Date of Birth

Case

search Cases...

+ New Case

Previous Next

To Do List

32°C Partly sunny

Search

ENG IN 18:16 25-08-2024

Salesforce Home Page

New Contact

Contact Information

Last Name	Vedula	Phone
First Name	Vedula	Home Phone
Email	kurravedula@gmail.com	Mobile
Date of Birth		
Case	Search Cases...	

To Do List

32°C Partly sunny

Salesforce Home Page

New Case

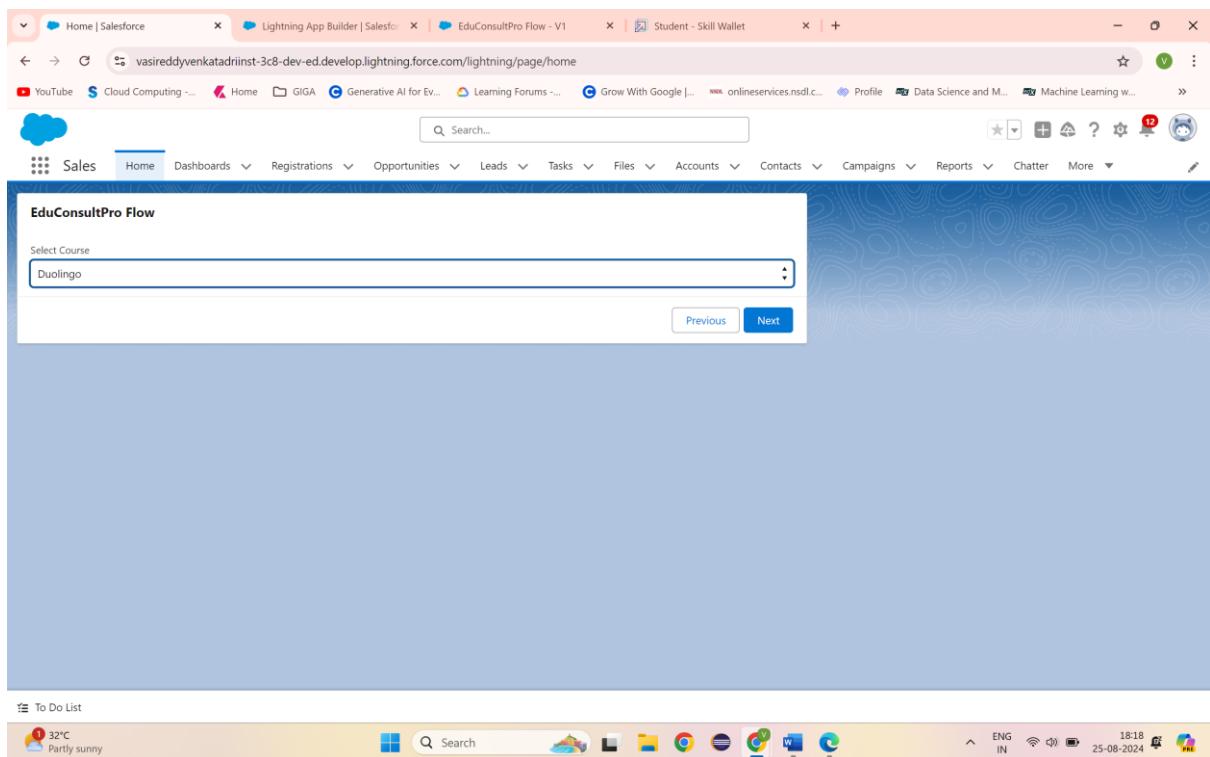
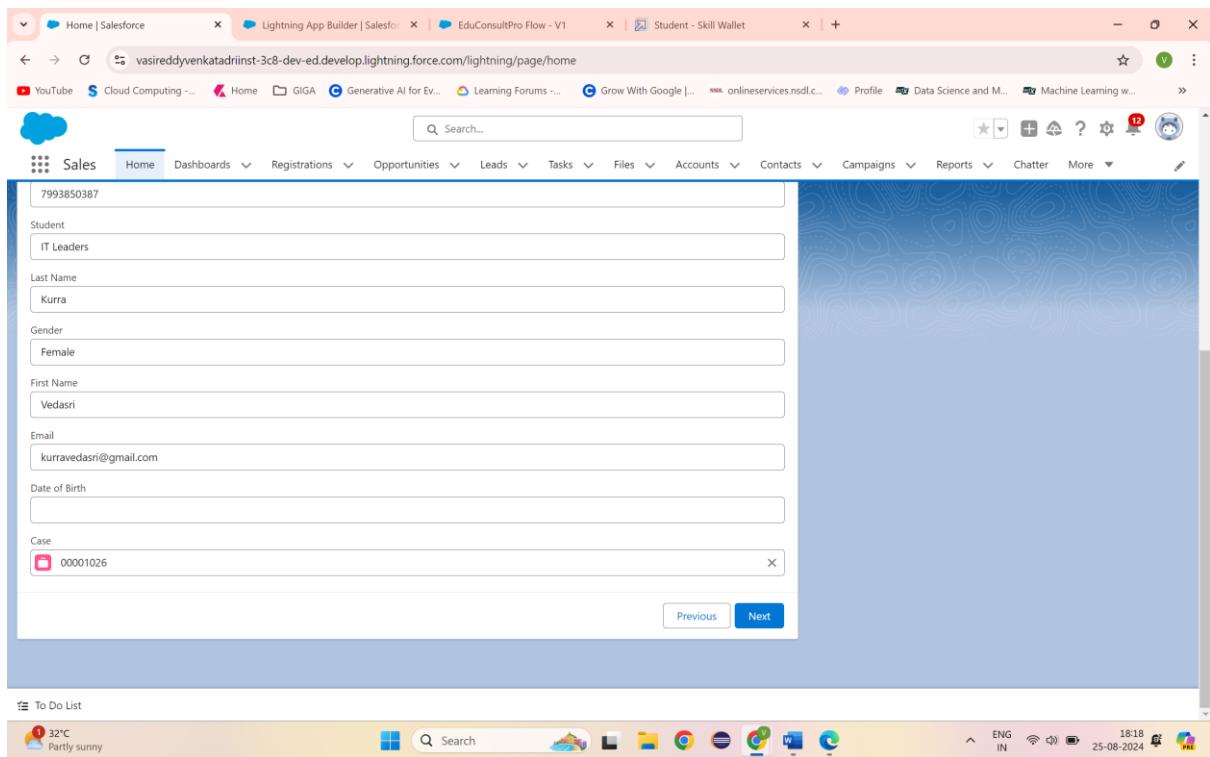
Case Information

Last Name	Kurra	Status	New
First Name	Vedula	Priority	Medium
Email	kurravedula@gmail.com	Contact Name	Vedula
Date of Birth		Case Origin	Email
Case	Search Cases...	Account Name	Search Accounts...
Type	--None--		

Send notification email to contact

javascript:void(0);

32°C Partly sunny



THANKYOU