

CRM Application to Manage the Services offered by an Institution

1. Overview

This project focuses on developing a CRM solution for EduConsultPro Institute, designed to enhance case handling and student inquiry management while streamlining the admissions process. The goal is to deliver an efficient solution by leveraging Salesforce CRM to automate the entire admissions process, from initial inquiry to final admission. This project aims to improve student satisfaction, optimize staff efficiency, and provide data-driven insights to refine admissions strategies.

2. Objective

Business Goals:

- To enhance the efficiency and transparency of the admissions process.
- To ensure effective and prompt handling of student inquiries.
- To centralize student data and case management for better monitoring.
- To provide personalized services for prospective students.

Specific Outcomes:

- Implementation of a centralized CRM system.
- Automation of admission-related workflows.
- Improved communication between students and admissions staff.
- Enhanced decision-making through data insights.

3. Salesforce Key Features and Concepts Utilized

- Creation of custom objects (Course, Consultant, Student, Appointment)
- Relationship establishment among objects
- Configuration of the Case object (Case Status, Case Type)
- Development of Lightning applications
- Implementation of ScreenFlows for student admissions and appointment booking
- User management and configuration
- Email template creation (Rejection, Submission, Approval)
- Record-triggered flows for automation

4. Requirements

1. Created Objects from a Spreadsheet:
 - Course, Consultant, Student, Appointment objects were created.
 - Established relationships among objects.

Setup > OBJECT MANAGER

Appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Fields & Relationships

11 Items. Sorted by Field Label

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Appointment	Name	Text(80)		✓	▼
Appointment Date/Time	Appointment_DateTime__c	Date/Time			▼
Appointment No	Appointment_No__c	Number(18, 0)			▼
Consultant	Consultant__c	Lookup(Consultant)		✓	▼
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Notes	Notes__c	Long Text Area(131072)			▼
Owner	OwnerId	Lookup(User,Group)		✓	
Purpose/Topic	PurposeTopic__c	Text(255)			▼
Status	Status__c	Picklist			▼
Student	Student__c	Lookup(Student)		✓	▼

Setup > OBJECT MANAGER

Registration

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Fields & Relationships

9 Items. Sorted by Field Label

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Course	Course__c	Lookup(Course)		✓	▼
Created By	CreatedById	Lookup(User)			
Fees Paid	Fees_Paid__c	Currency(10, 2)			▼
Last Modified By	LastModifiedById	Lookup(User)			
Owner	OwnerId	Lookup(User,Group)		✓	
Registration Date	Registration_Date__c	Date			▼
Registration Name	Name	Text(80)		✓	▼
Registration Status	Registration_Status__c	Picklist			▼
Student	Student__c	Lookup(Student)		✓	▼

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

List View Button Layout

Hierarchy Columns

Scoping Rules

Object Access

Triggers

Fields & Relationships

43 Items. Sorted by Field Label

New

Deleted Fields

Field Dependencies

Set History Tracking

Product	Product__c	Picklist			▼
Product	ProductId	Lookup(Product)		✓	
Service Contract	ServiceContractId	Lookup(Service Contract)		✓	
SLA Violation	SLAViolation__c	Picklist			▼
Status	Status	Picklist		✓	▼
Stopped	IsStopped	Checkbox			
Stopped Since	StopStartDate	Date/Time			
Student Query	Student_Query__c	Lookup(Student)		✓	▼
Subject	Subject	Text(255)			
Type	Type	Picklist			▼
Web Company	SuppliedCompany	Text(80)			
Web Email	SuppliedEmail	Email			
Web Name	SuppliedName	Text(80)			
Web Phone	SuppliedPhone	Text(40)			

2. Configured the Case object:
- Defined case statuses and types.

Case Status Picklist Values							Case Status Picklist Values Help ?
Action	Values	API Name	Closed	Default	Chart Colors	Modified By	
Edit Deactivate	New	New	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assigned dynamically	Shreya KS , 25/11/2024, 11:47 am	
Edit Del Deactivate	Working	Working	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Shreya KS , 25/11/2024, 11:47 am	
Edit Del Deactivate	Escalated	Escalated	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Shreya KS , 25/11/2024, 11:47 am	
Edit Del Deactivate	Closed	Closed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Shreya KS , 25/11/2024, 11:47 am	
Edit Del Deactivate	Open	Open	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Shreya KS , 25/11/2024, 2:43 pm	
Edit Del Deactivate	In-progress	In-progress	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Shreya KS , 25/11/2024, 2:43 pm	

case type

Case Type Picklist Values							Case Type Picklist Values Help ?
Action	Values	API Name	Default	Chart Colors	Modified By		
Edit Del Deactivate	Mechanical	Mechanical	<input type="checkbox"/>	Assigned dynamically	Shreya KS , 25/11/2024, 11:47 am		
Edit Del Deactivate	Electrical	Electrical	<input type="checkbox"/>	Assigned dynamically	Shreya KS , 25/11/2024, 11:47 am		
Edit Del Deactivate	Electronic	Electronic	<input type="checkbox"/>	Assigned dynamically	Shreya KS , 25/11/2024, 11:47 am		
Edit Del Deactivate	Structural	Structural	<input type="checkbox"/>	Assigned dynamically	Shreya KS , 25/11/2024, 11:47 am		
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	Assigned dynamically	Shreya KS , 25/11/2024, 11:47 am		
Edit Del Deactivate	Immigration	Immigration	<input type="checkbox"/>	Assigned dynamically	Shreya KS , 25/11/2024, 2:42 pm		
Edit Del Deactivate	Visa Application	Visa Application	<input type="checkbox"/>	Assigned dynamically	Shreya KS , 25/11/2024, 2:42 pm		

3. Developed a Lightning app for the institution.

← Lightning App Builder

⚙ App Settings

📄 Pages ▾

EduConsultPro

🔍 Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ

EduConsultPro

* Developer Name ⓘ

EduConsultPro

Description ⓘ

Enter a description...

App Branding

Image ⓘ

Upload

Primary Color Hex Value ⓘ

#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Ed

EduConsultPro

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

Selected Items

Home

Students

Courses

Consultants

Appointments

Registrations

Cases

▶

◀

▲

▼

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

Analytics Cloud Integration User

Analytics Cloud Security User

Authenticated Website

A

 Authenticated Website

B2B Reordering Portal Buyer Profile

Contract Manager

Custom: Marketing Profile

Selected Profiles

System Administrator

4. Created a ScreenFlow for the student admission application process:

- Added screen elements.
- Created student records using the Create element.
- Included decision elements and GET Record elements.
- Registered records using the Create Records element.
- Designed email templates for communication.
- Added action and screen elements.

Flow Builder

EduConsultantPro Student Flow - V1

?

Select Elements

Auto-Layout

Last saved on 25/11/2024, 03:14 pm

Active

Run

Debug

Save As New Version

Save

Deactivate

Toolbox

Manager

Search this flow...

New Resource

RESOURCES

Record (Single) Variables (1)

StudentRecordRes

ELEMENTS

Screens (1)

Student Info

Screen Flow Start

+

Student Info Screen

+

End

b.Create Student Record using Create Element

Flow Builder

EduConsultantPro Student Flow - V2

✓ Your flow was activated.

Select Elements

Auto-Layout

Last saved on 25/11/2024, 03:23 pm

Active

Toolbox

Manager

Search this flow...

New Resource

RESOURCES

Record (Single) Variables (1)

StudentRecordRes

ELEMENTS

Create Records (1)

Create Student Record

Screens (1)

Student Info

Screen Flow Start

+

Student Info Screen

+

Create Student Record Create Records

+

End

c.Add Screen Element

Edit Screen

EduConsultantPro Student Flow

Picklist

Select Course

--None--

Pause

Previous

Finish

Picklist

* Choice

{!IELTS}

* Choice

{!GRE}

* Choice

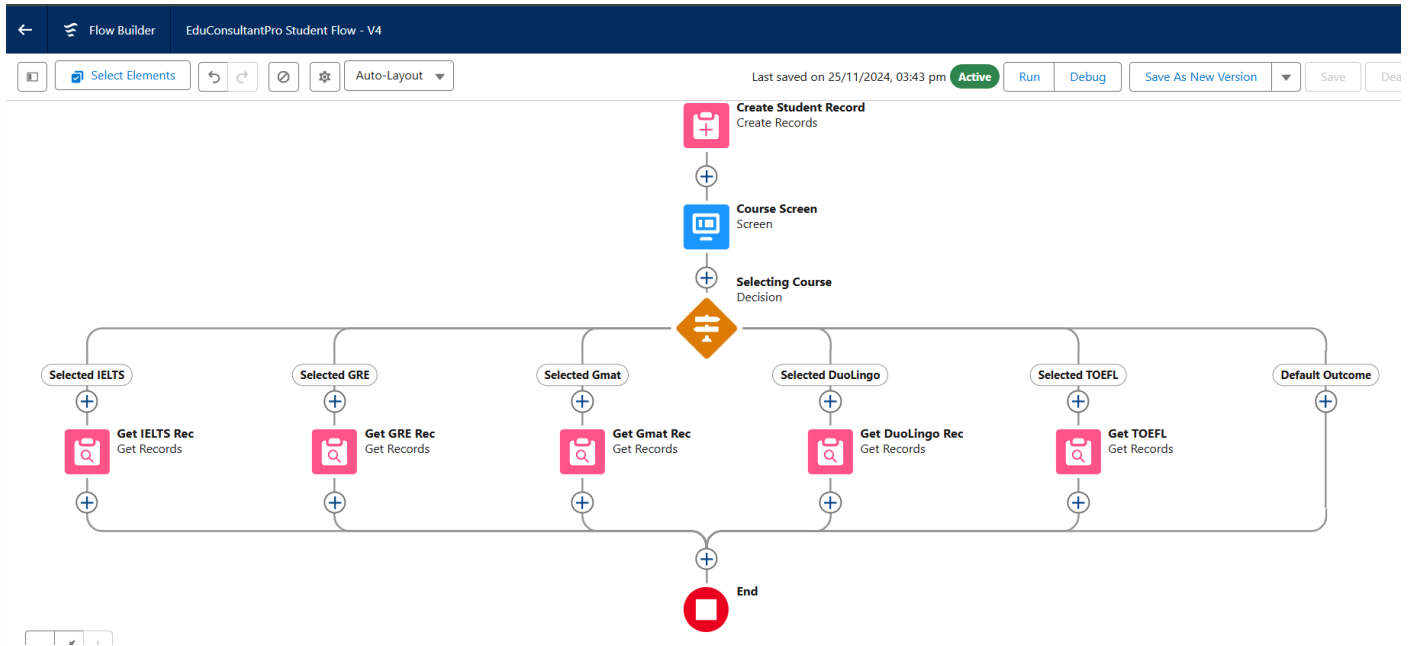
{!GMAT}

* Choice

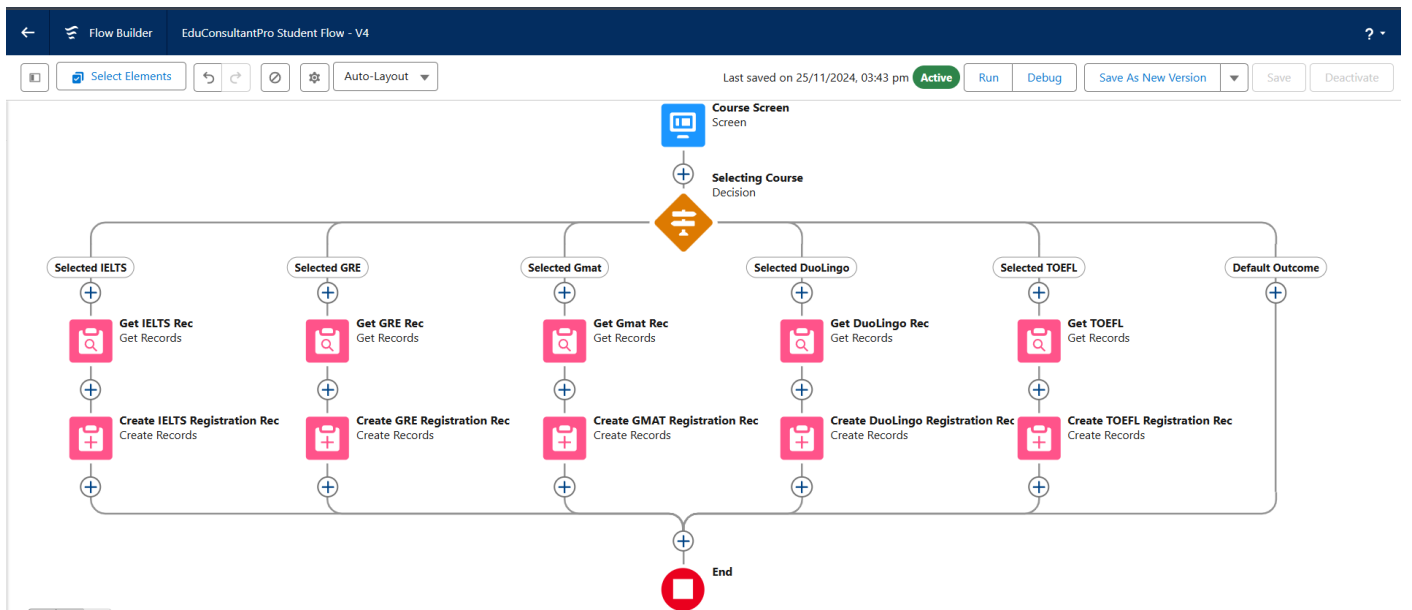
{!Duolingo}

* Choice

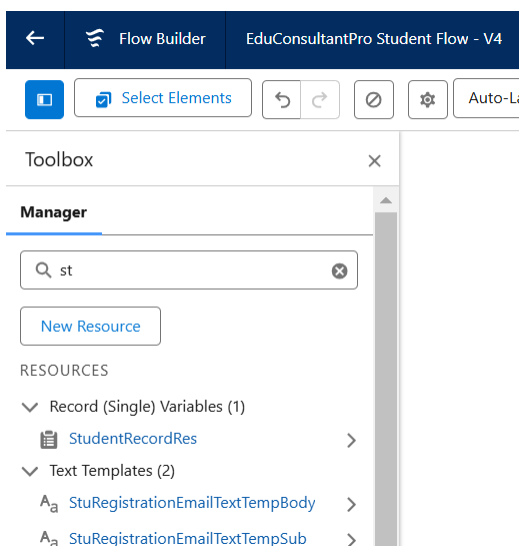
{!TOEFL}



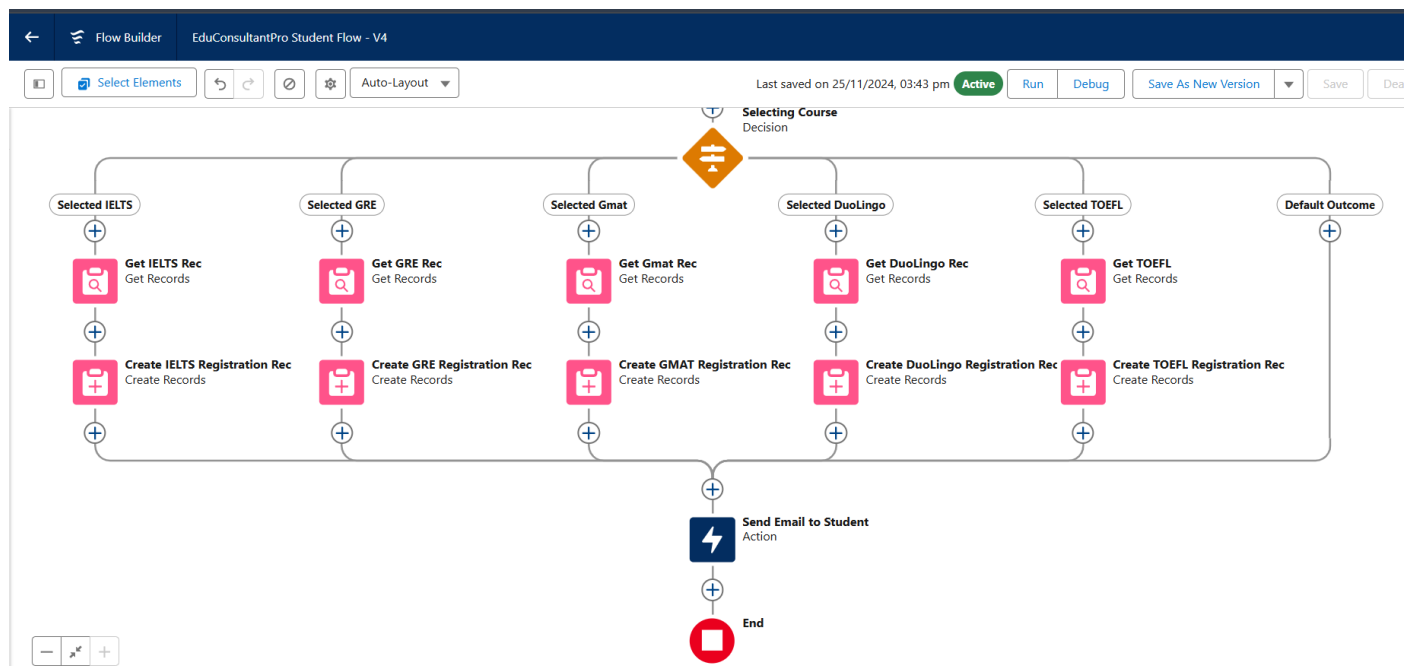
f. Create Registration Record using Create Records Element



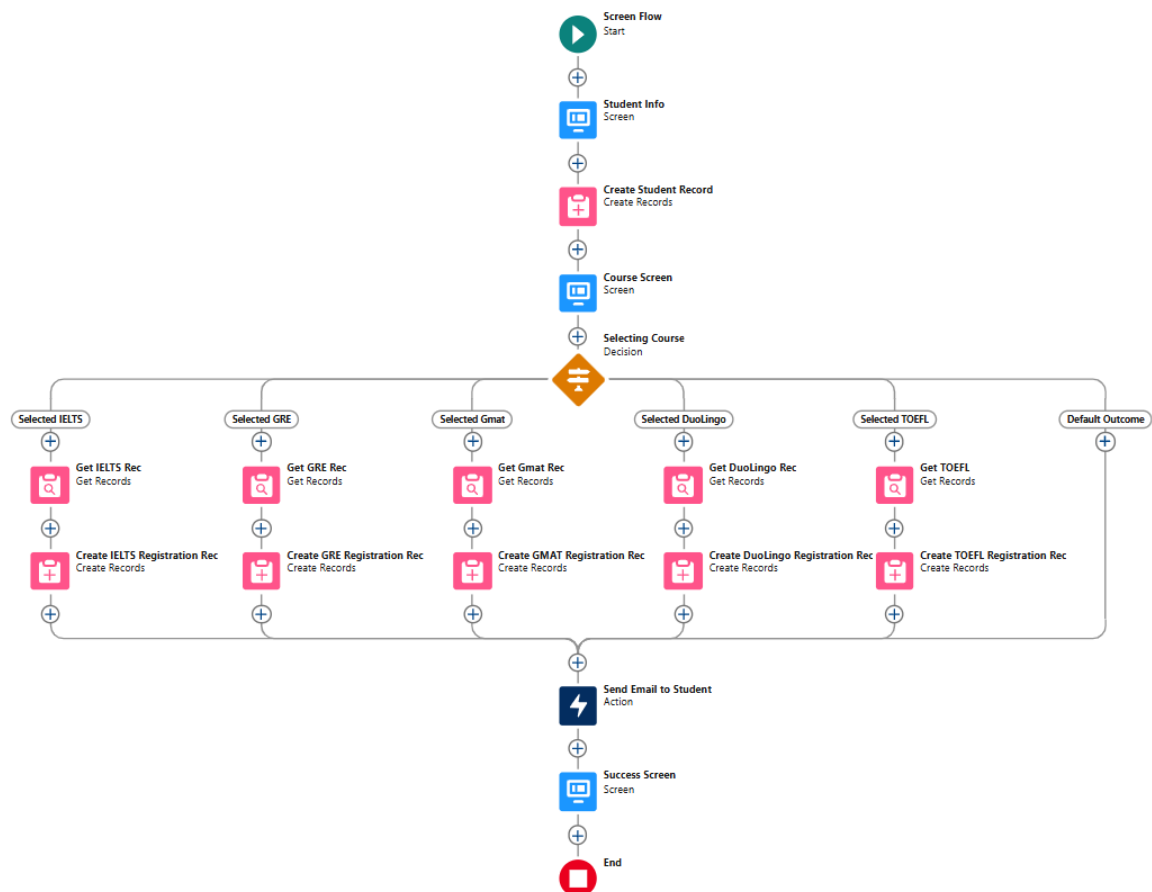
g. Create Email Text Template Variables for email body and subject



h.Add an Action Element



i.Add Screen Element



5. Managed users and configured their settings.

a.User

SETUP

Users

User Edit

Save Save & New Cancel

General Information

First Name

Last Name

Consultant

Alias

cons

Email

shreyaks124@gmail.com

Username

cons@tant.com

Nickname

consa

Title

Company

Department

Division

Role

<None Specified>

User License

Work.com Only

Profile

Work.com Only User

Active

☒

Marketing User

☐

Offline User

☐

Knowledge User

☐

Flow User

☐

Service Cloud User

☐

Site.com Contributor User

☐

Site.com Publisher User

☐

WDC User

☐

Data.com User Type

--None--

Data.com Monthly Addition Limit

300

Accessibility Mode (Classic Only)

☐

High-Contrast Palette on Charts

☐

Load Lightning Pages While Scrolling

☒

Debug Mode

☐

b.Configure the User Settings

SETUP

Users

Mailing Address

Street

City

Zip/Postal Code

State/Province

Country

IN

Single Sign On Information

Federation ID

Locale Settings

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Locale

English (India)

Language

English

Approver Settings

Delegated Approver

Manager

Consultant


Receive Approval Request Emails

Only if I am an approver

Save Save & New Cancel

6. Designed and implemented email templates for various scenarios (rejection, submission, approval).

Rejection


Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
Calendar
People
Cases
Forecasts
Registrations
Rejection Notification Tem...

Search...
?
+
-
+
-

Email Template
Rejection Notification Template
Edit
Clone
Delete

Details

Related

Information

Email Template Name

Rejection Notification Template

Description

Made in Email Template Builder

Related Entry Type

Appointment

Folder

EduConsultantPro

Message Content

Subject

Rejection request with EduConsultant

HTML Value

Dear {{{Appointment__c.Student_Name__c}}},

I hope this email finds you well. I regret to inform you that your request for an appointment scheduled on {{{Appointment__c.Appointment_DateTime__c}}} regarding {{{Appointment__c.PurposeTopic__c}}} has been rejected.

Appointment Details:

Appointment No: {{{Appointment__c.Name__c}}}

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}}}

The decision to reject this request was not made lightly, and we sincerely apologize for any inconvenience this may cause. We encourage you to submit a new request or reach out to us if you wish to reschedule or if there are other ways we can assist you.

If you have further concerns or need additional clarification, please feel free to contact us. We are committed to supporting you and will do our best to find a suitable resolution.

Thank you for your understanding.

Best regards,

{{{RecipientName__c}}},

EduConsultantPro

Enhanced Letterhead

Additional Information

Created By

Srinaya KS, 25/11/2024, 8:17 pm

Last Modified By

Srinaya KS, 25/11/2024, 8:17 pm

Email Preview

Submission

← → ↺ 🏠 🔍 sjec-2b-dev-ed.develop.lightning.force.com/lightning/r>EmailTemplate/00XQy000008LOALMA2/view?queryScope=userFolders

🔍 ☆ 📷 🗑️ 👤

☁️

Search...

★ ⛶ ⚙️ ? ⚙️ 🔔

⋮ Sales Home Opportunities ▾ Leads ▾ Tasks ▾ Files ▾ Accounts ▾ Contacts ▾ Campaigns ▾ Dashboards ▾ Reports ▾ Chatter Groups ▾ Calendar ▾ People ▾ Cases ▾ * Submission Template ▾ X More ▾ ✎

Email Template
Submission Template

Edit Clone Delete ▾

Details Related

Information

Email Template Name
Submission Template✎

Description✎

Made in Email Template Builder
☐

Related Entity Type

Folder
EduConsultantPro✎

Message Content

Subject
Appointment request with EduConsult✎

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}}}.

Enhanced Letterhead✎

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.

Approval

Email Template

Approval Notification Template

Edit
Clone
Delete

Details

Related

Information

Email Template Name	Approval Notification Template	Related Entity Type	
Description		Folder	EduConsultantPro
Made in Email Template Builder	<input type="checkbox"/>		

Message Content

Subject	Approval request with EduConsultant	Enhanced Letterhead	
HTML Value	<p>Dear {{{Appointment__c.Student_Name__c}}},</p> <p>I hope this email finds you well. I am pleased to inform you that your request for an appointment scheduled on {{{Appointment__c.Appointment_DateTime__c}}} regarding {{{Appointment__c.PurposeTopic__c}}} has been **approved**.</p> <p>Appointment Details:</p> <p>Appointment No: {{{Appointment__c.Name}}}</p> <p>Student Name: {{{Appointment__c.Student_Name__c}}}</p> <p>Consultant Name: {{{Appointment__c.Consultant__c}}}</p> <p>Date & Time: {{{Appointment__c.Appointment_DateTime__c}}}</p> <p>Purpose: {{{Appointment__c.PurposeTopic__c}}}</p> <p>I look forward to meeting you and assisting with your questions or concerns regarding {{{Appointment__c.PurposeTopic__c}}}. Your growth and success are important to us, and I am confident our discussion will be fruitful.</p> <p>If there is any change in your availability, or if you have further queries, please don't hesitate to get in touch.</p>		

7. Developed a record-triggered flow to automate key processes.

a. Configure the Start Element

The screenshot shows the Flow Builder interface with a canvas on the left and a configuration panel on the right. The canvas displays a flow starting with a 'Record-Triggered Flow Start' element, followed by a 'Run Immediately' connector, and ending with an 'End' element. The configuration panel on the right is titled 'Configure Start' and includes the following sections:

- Appointment**: A text input field.
- Configure Trigger**: A section with the heading '* Trigger the Flow When:' and four radio button options: 'A record is created' (selected), 'A record is updated', 'A record is created or updated', and 'A record is deleted'.
- Set Entry Conditions**: A section with a description and a 'Condition Requirements' dropdown menu set to 'None'.
- Optimize the Flow for:**: A section with two checkboxes: 'Fast Field Updates' and 'Actions and Related Records' (checked).

b. Add an Action Element

The screenshot shows the Flow Builder interface with a canvas on the left and a configuration panel on the right. The canvas displays a flow starting with a 'Record-Triggered Flow Start' element, followed by a 'Run Immediately' connector, then an 'Approval SubFlow' action element, and ending with an 'End' element. The configuration panel on the right is titled 'Submit for Approval' and includes the following sections:

- Label**: A text input field with the value 'Approval SubFlow'.
- API Name**: A text input field with the value 'Approval_SubFlow'.
- Description**: A text area.
- Submit for Approval**: A section with a lightning bolt icon and the text 'submit-submit'.
- Set Input Values for the Selected Action**: A section with a list of input fields and toggle switches:
 - Record ID**: A dropdown menu with the value 'Triggering Appointment_c > Record ID'.
 - Approval Process Name Or ID**: A toggle switch labeled 'Not Included'.
 - Next Approver IDs**: A toggle switch labeled 'Not Included'.
 - Skip Entry Criteria**: A toggle switch labeled 'Not Included'.

8. Built a ScreenFlow for existing students to book appointments.

a. Add Screen Element

New Screen

Components Fields

text

Input (2)

- Long Text Area
- Text

Display (1)

- Display Text

[Flow Label]

Enter Student Name

Enter Student Email

Pause

Previous Finish

← Text

Label

Enter Student Email

* API Name

Enter_Student_Email

Require

Read Only

Enter value or search resources...

Disabled

Enter value or search resources...

Default Value

Enter value or search resources...

> Set Component Visibility

> Validate Input

> Provide Help

Get more on the AppExchange

EduConsultantPro Existing Student Flow - V1

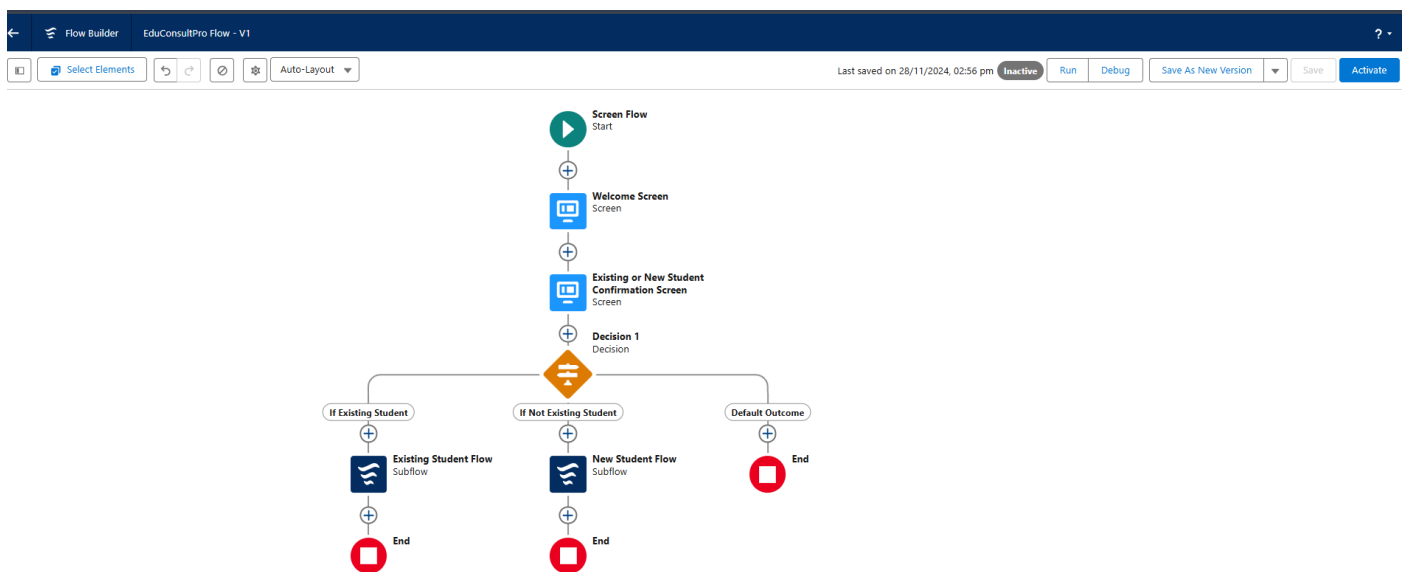
Auto-Layout

Last saved on 28/11/2024, 03:50 pm Active Run Debug Save As New Version Save Deactivate

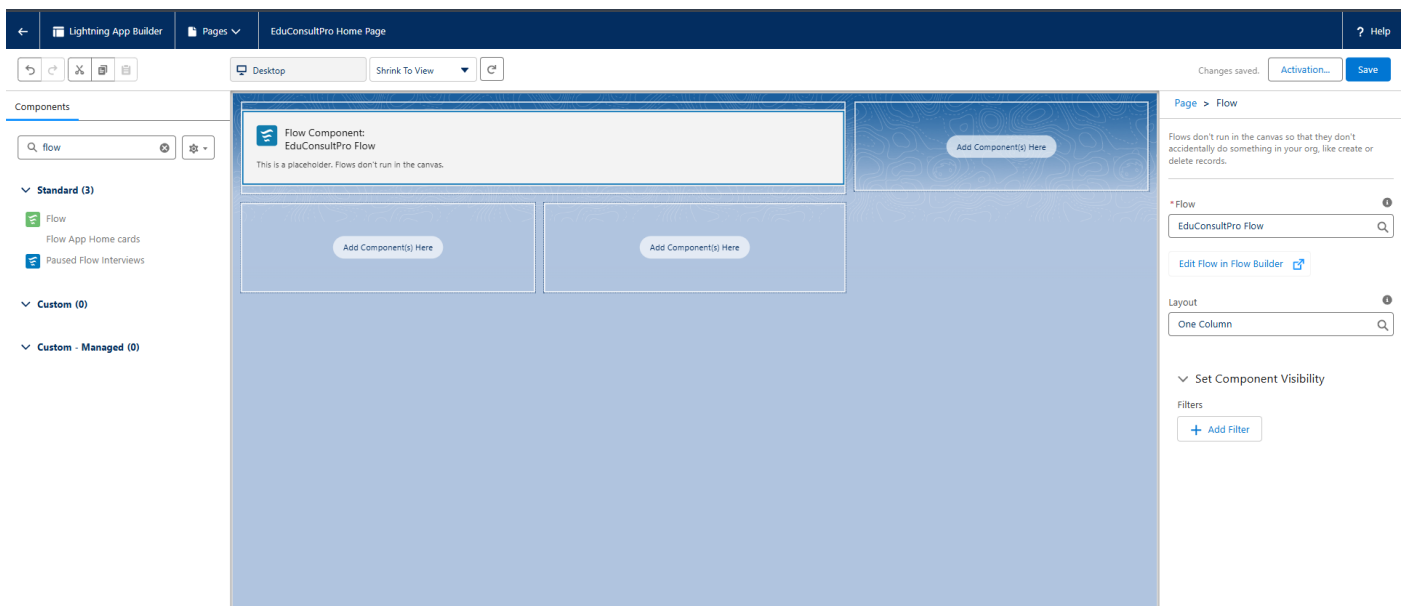
```

graph TD
    Start([Screen Flow Start]) --> GetInfo[Get Student Info Screen]
    GetInfo --> GetRec[Get Rec Get Records]
    GetRec --> Decision{Appointment or Case Decision}
    Decision -- Appointment --> Booking[Appointment Booking Screen]
    Booking --> GetCons[Get Consultant Rec Get Records]
    GetCons --> CreateRec[Create Records 1 Create Records]
    CreateRec --> Confirmation[Confirmation Screen]
    Decision -- Case --> CreateCase[Create Student Case Subflow]
    Confirmation --> End([End])
    CreateCase --> End
  
```

9. Combined all ScreenFlows into a unified process.



10. Created a Lightning app page for better user experience.



5. Testing and Validation

- *Unit Testing:*
 - Verified data integrity and relationships.
- *User Interface Testing:*
 - Ensured smooth navigation and functionality of screen elements.
 - Validated email notifications and action responses.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

- Automated student admission tracking.
- Centralized case management for inquiries.
- Real-time communication and notifications to students.
- Enhanced decision-making with data-driven insights.
- Efficient appointment booking for existing students.

Conclusion:

The EduConsultPro Institute's Salesforce CRM-based solution has successfully improved the student experience by automating critical aspects of the admissions process. The admissions team is now better equipped to manage and process applications, leading to increased enrollment and student satisfaction. By centralizing all data and interactions, the institution can offer a more efficient, personalized service, advancing its overall objectives.

