

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

## Objective:

The project's goal is to create a CRM solution for EduConsultPro Institute that will improve case handling and student inquiry management while expediting the admissions process. Automating and streamlining the entire admissions process—from the time a potential student inquires to the last steps of admission—is the aim of deploying Salesforce CRM. Students and the admissions staff will be able to communicate easily thanks to the solution, which will guarantee that questions are handled effectively and promptly. The CRM will also centralize case management and student data, making it easier for admissions staff to monitor and evaluate applications. The application will enhance student satisfaction, free up team time for more strategic work, and offer data-driven insights to improve admissions tactics. The project's goal is to provide the institution's admissions staff and potential students with an effective, transparent, and customized experience.

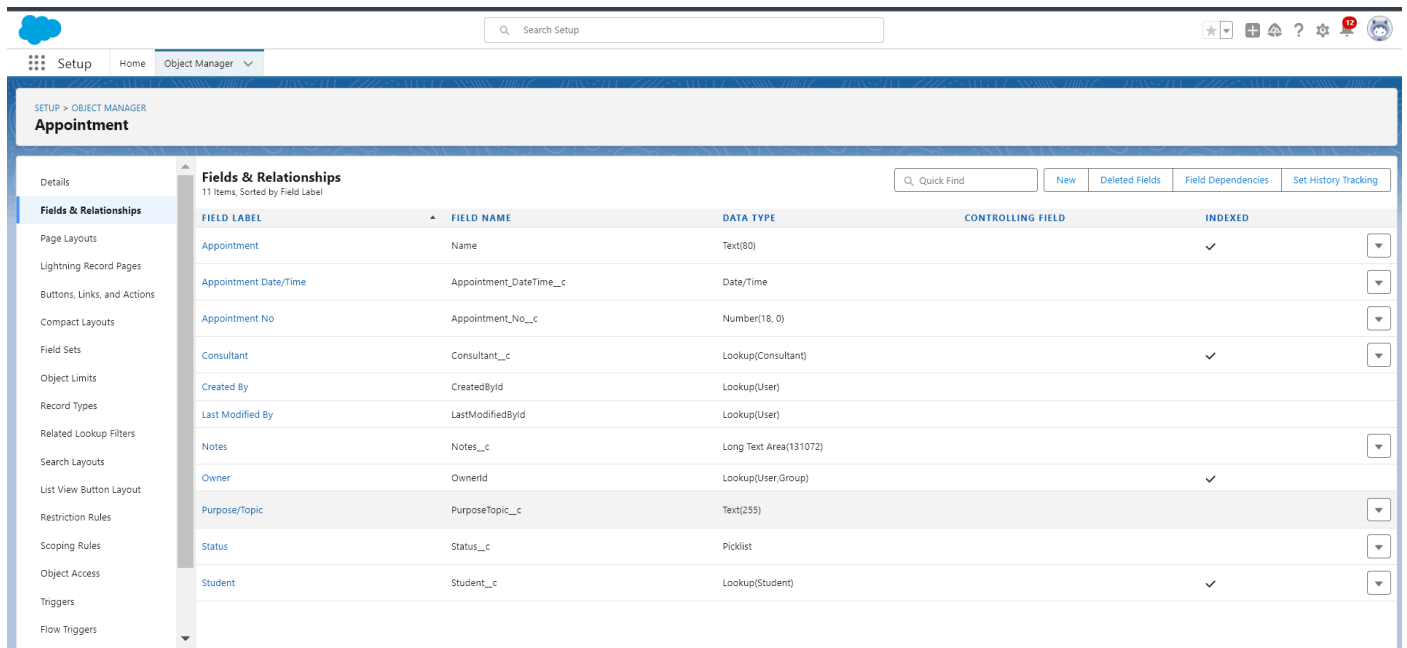
## Requirements

### 1.Create Objects from Spreadsheet

a.course object created

b.Consultant ,Student ,Appointment object created

c.Create relation Among the objects



The screenshot shows the Salesforce Setup interface, specifically the 'Object Manager' section for the 'Appointment' object. The 'Fields & Relationships' tab is selected, displaying a list of 11 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The fields listed are: Appointment (Name, Text(80), Indexed), Appointment Date/Time (Appointment\_DateTime\_\_c, Date/Time, Indexed), Appointment No (Appointment\_No\_\_c, Number(18, 0), Indexed), Consultant (Consultant\_\_c, Lookup(Consultant), Indexed), Created By (CreatedById, Lookup(User), Indexed), Last Modified By (LastModifiedById, Lookup(User), Indexed), Notes (Notes\_\_c, Long Text Area(131072), Indexed), Owner (OwnerId, Lookup(User,Group), Indexed), Purpose/Topic (PurposeTopic\_\_c, Text(255), Indexed), Status (Status\_\_c, Picklist, Indexed), and Student (Student\_\_c, Lookup(Student), Indexed).

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

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course	Course__c	Lookup(Course)		<input checked="" type="checkbox"/>
Created By	CreatedById	Lookup(User)		
Fees Paid	Fees_Paid__c	Currency(10, 2)		<input checked="" type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Registration Date	Registration_Date__c	Date		<input checked="" type="checkbox"/>
Registration Name	Name	Text(80)		<input checked="" type="checkbox"/>
Registration Status	Registration_Status__c	Picklist		<input checked="" type="checkbox"/>
Student	Student__c	Lookup(Student)		<input checked="" type="checkbox"/>

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

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

d.Configure case object  
case status:

Case Status Picklist Values

New

Reorder

Replace

Printable View

Chart Colors

Case Status Picklist Values Help

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

case type

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	<a href="#">Shreya KS</a> , 25/11/2024, 11:47 am
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Electrical	Electrical	<input type="checkbox"/>	Assigned dynamically	<a href="#">Shreya KS</a> , 25/11/2024, 11:47 am
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Electronic	Electronic	<input type="checkbox"/>	Assigned dynamically	<a href="#">Shreya KS</a> , 25/11/2024, 11:47 am
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Structural	Structural	<input type="checkbox"/>	Assigned dynamically	<a href="#">Shreya KS</a> , 25/11/2024, 11:47 am
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Other	Other	<input type="checkbox"/>	Assigned dynamically	<a href="#">Shreya KS</a> , 25/11/2024, 11:47 am
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Immigration	Immigration	<input type="checkbox"/>	Assigned dynamically	<a href="#">Shreya KS</a> , 25/11/2024, 2:42 pm
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Visa Application	Visa Application	<input type="checkbox"/>	Assigned dynamically	<a href="#">Shreya KS</a> , 25/11/2024, 2:42 pm

## e.Create Lightning app

← 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

▶

◀

▲

▼

3

## User Profiles

Choose the user profiles that can access this app.

### Available Profiles

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

## 2.Create a ScreenFlow for Student Admission Application process

### a.Add Screen Element

←

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

New Resource

RESOURCES

Record (Single) Variables (1)

StudentRecordRes

ELEMENTS

Screens (1)

Student Info

Screen Flow Start

+

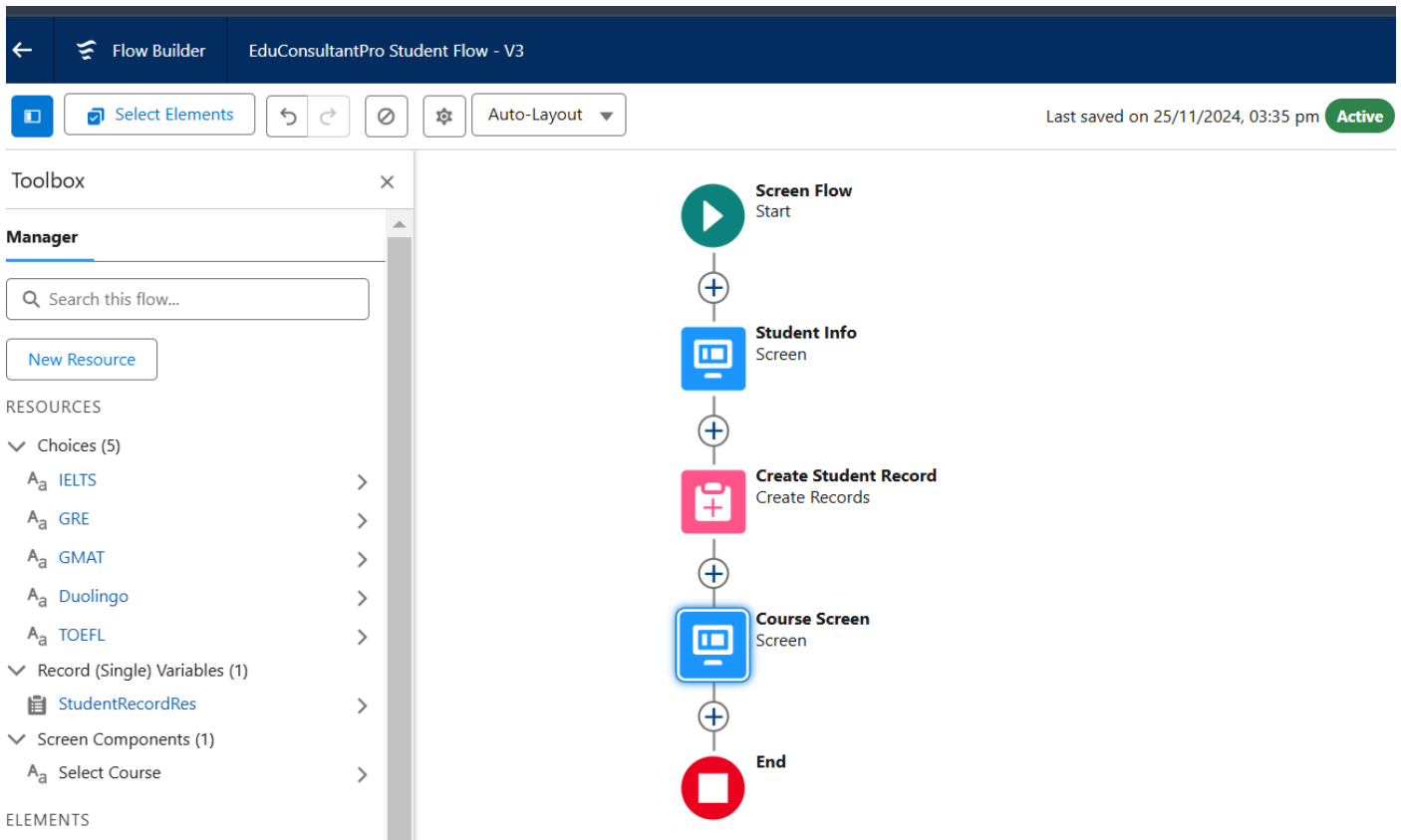
Student Info Screen

+

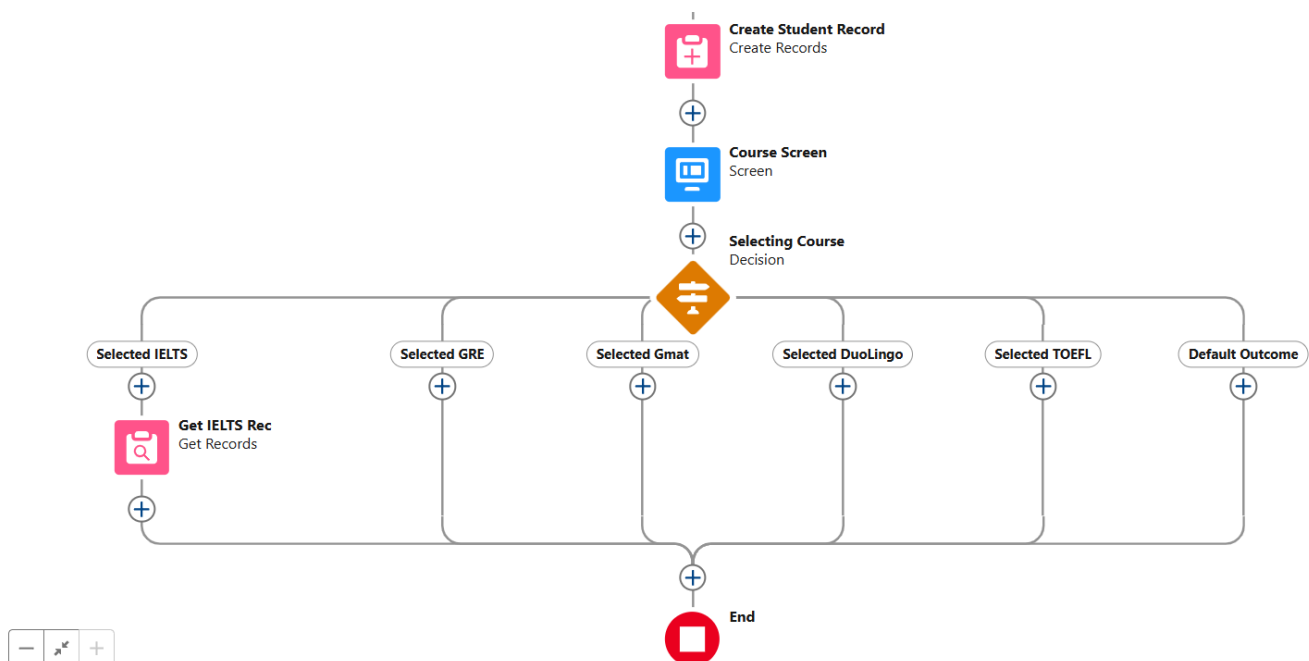
End

### b.Create Student Record using Create Element

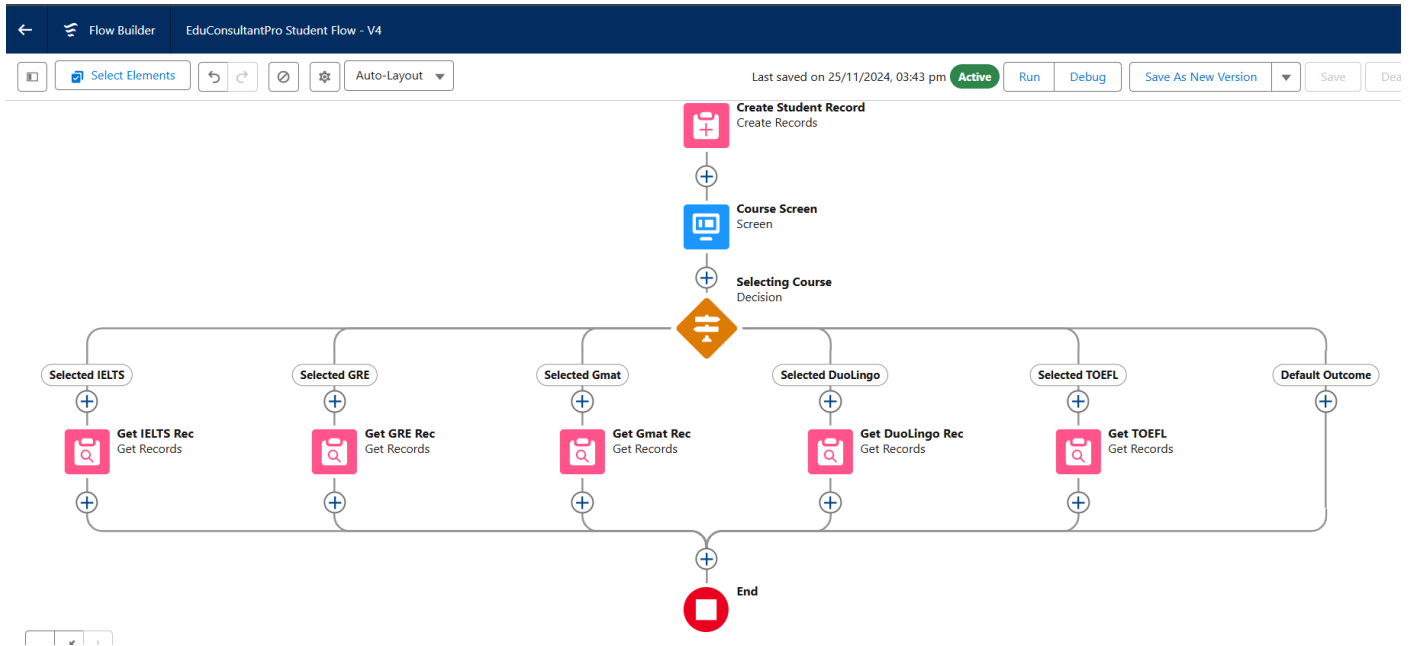




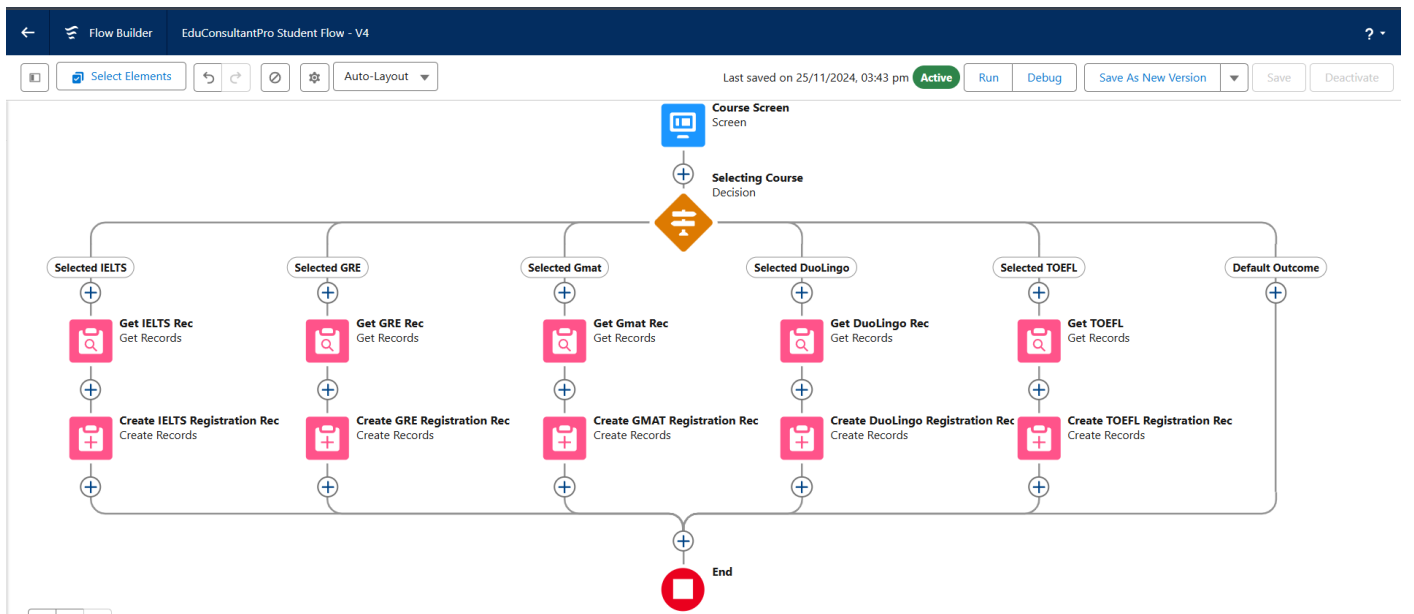
#### d.Add Decision Element



#### e.Add GET Record Element



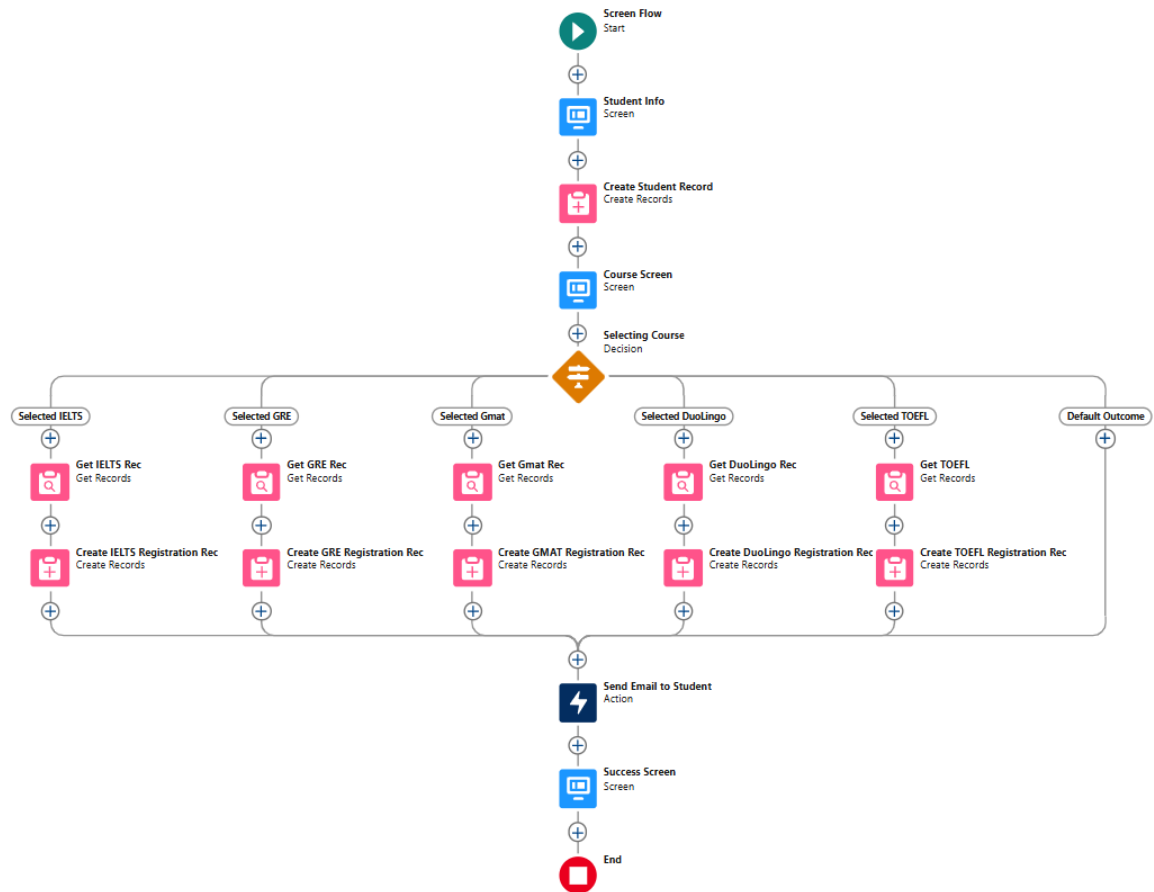
## f. Create Registration Record using Create Records Element



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







### 3.Create Users

#### 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

#### 4. Create an Email Template Rejection

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

### Email Templates

#### Rejection Notification Template

Edit
Clone
Delete

Details	Related
<b>Information</b>	
Email Template Name Rejection Notification Template	Related Entity Type Appointment
Description	Focus EduConsultantPro
Made in Email Template Builder <input type="checkbox"/>	
<b>Message Content</b>	
Subject Rejection request with EduConsultant	Enhanced Letterhead
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}}} 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, {{{Recipient_Name}}}, EduConsultantPro	
<b>Additional Information</b>	
Created By Shreye KS, 25/11/2024, 8:17 pm	Last Modified By Shreye KS, 25/11/2024, 8:17 pm

## Submission



Flow Builder

Select Elements

Auto-Layout

Run

Debug

View Tests

Save As New Version

Save

Activate

Record-Triggered Flow Start

Run Immediately

End

Configure Start

Appointment

Configure Trigger

Trigger the Flow When:

☒ A record is created
 ☐ A record is updated
 ☐ A record is created or updated
 ☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None

Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

## b.Add an Action Element

EduConsultPro Approval Flow - V1

Auto-Layout

Last saved on 25/11/2024, 08:28 pm

Active

Run

Debug

View Tests

Save As New Version

Save

Deactivate

Record-Triggered Flow Start

Run Immediately

Approval SubFlow Action

End

Submit for Approval

Label

Approval SubFlow

API Name

Approval\_SubFlow

Description

Submit for Approval

submit-submit

Use values from earlier in the flow to set the inputs for the "Submit for Approval" core action. To use its outputs later in the flow, store them in variables.

Set Input Values for the Selected Action

Record ID

Triggering Appointment\_\_c > Record ID

Approval Process Name Or ID

Not included

Next Approver IDs

Not included

Skip Entry Criteria

Not included

## 6.Create a ScreenFlow for Existing Student to Book an Appointment

### 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

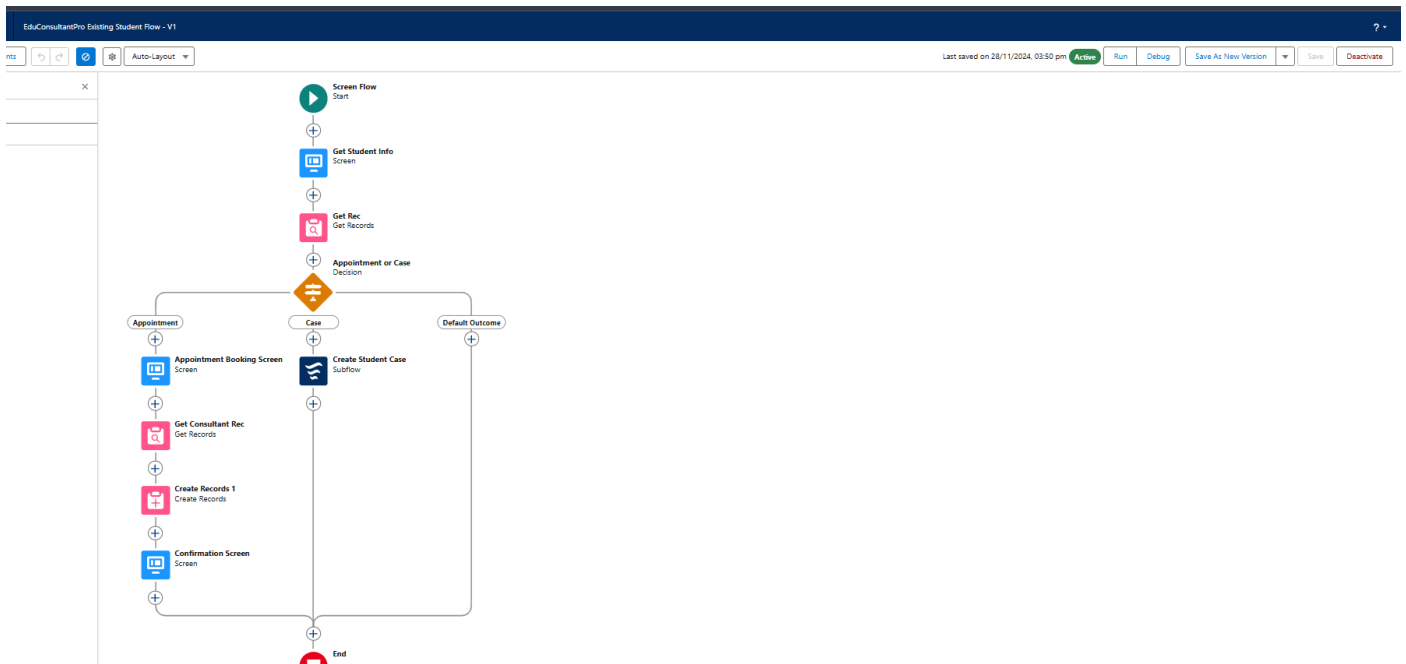
Enter value or search resources...

Set Component Visibility

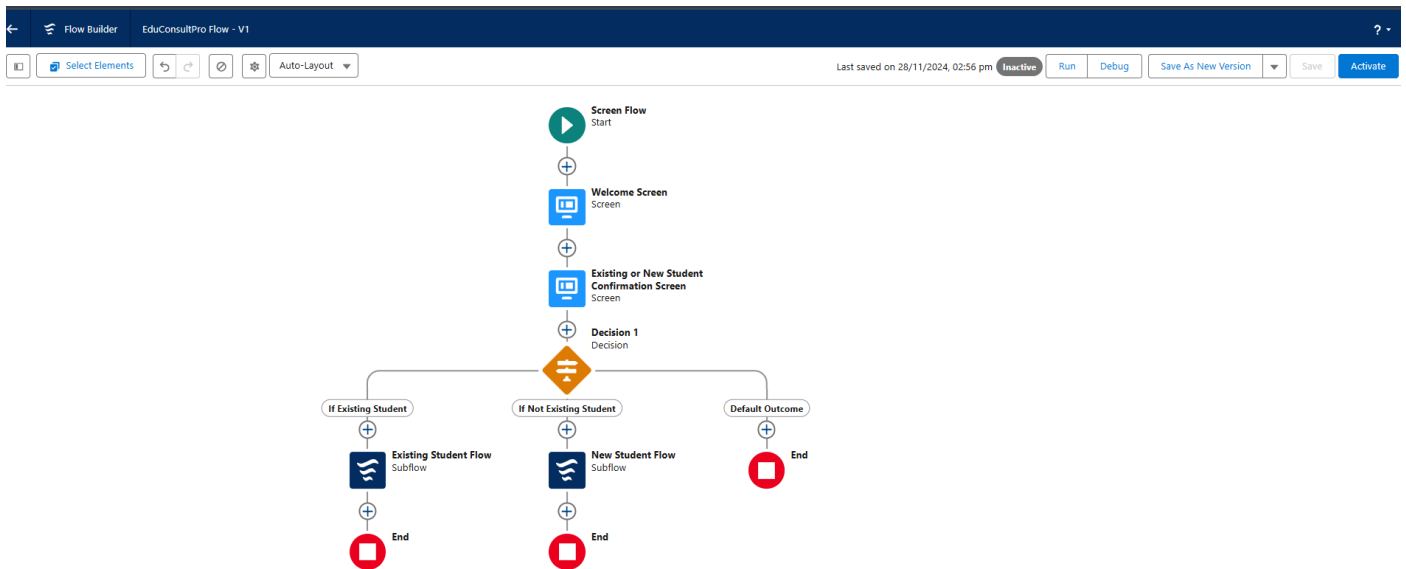
Validate Input

Provide Help

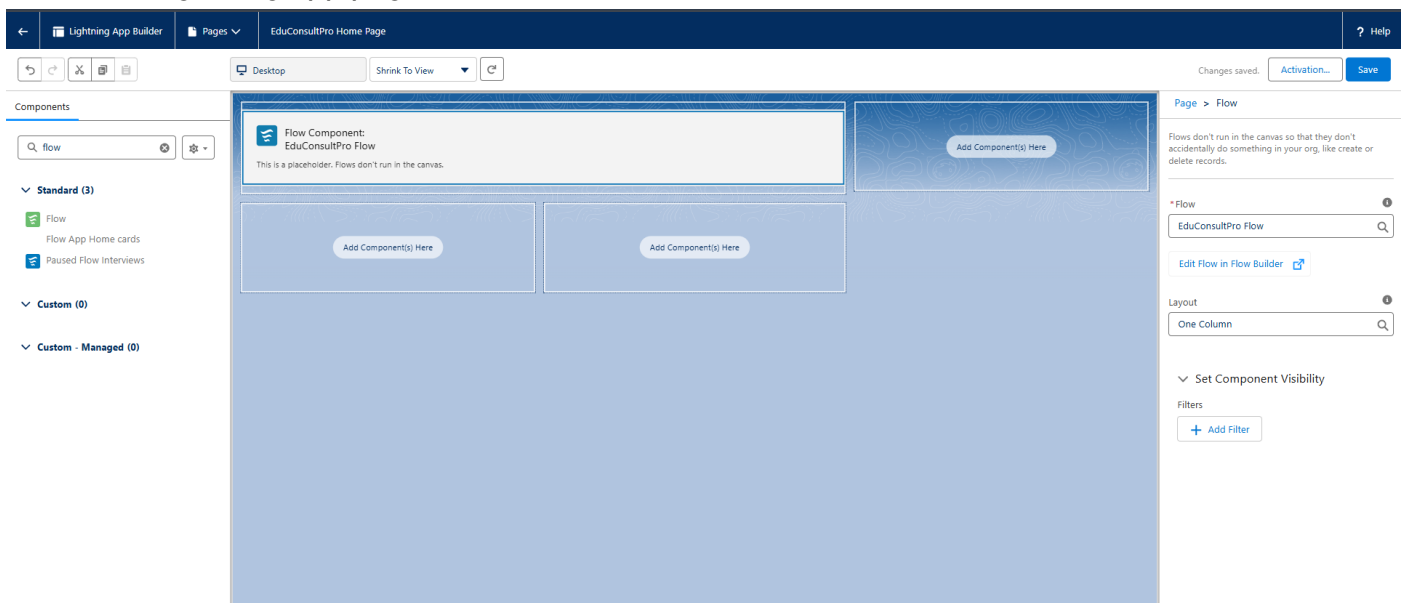
12



7.Create a ScreenFlow to Combine all the flows at one place a.Add Screen Element



## 8.Create a lightning app page



## Conclusion:

The EduConsultPro Institute's Salesforce CRM-based solution will improve the student experience, automate the most important parts of the admissions process, and give the admissions team the resources they need to better handle and process applications. The university may offer prospective students a more effective and personalized service by centralizing all data and interactions, which will boost enrollment, improve student happiness, and advance the institution as a whole.

