

PROJECT READY TALENT PROGRAM

TITLE :

CRM Application to Manage the Services
Offered by EduConsultPro Institute

PREPARED BY :

Siddhi Sunil Sukale

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1. Introduction

EduConsultPro Institute is a leading educational institution offering a variety of courses and programs in diverse fields. With a growing number of prospective students seeking admission each year, the institute faces challenges in managing the admission process, students enquiry, and expert consulting services efficiently. To address these challenges, EduConsultPro Institute decides to leverage Salesforce CRM to streamline the admission process and enhance the overall experience for both students and admissions staff.

The use case focuses on the admission process for prospective students interested in enrolling in courses and programs offered by EduConsultPro Institute. The goal is to provide a seamless and transparent experience for students while enabling admissions staff to efficiently review and process admission applications, students enquiry and case management.

2. Requirements

1. Admission Application Management:

Prospective students should have access to the admission application form through the institute's website or portal. The admission application form should collect comprehensive information including personal details, academic history, and qualification. Submitted admission applications should be captured and stored in the Salesforce CRM system. Students should receive automated email notifications after successful submission of application. Admissions staff should be able to generate reports and dashboards to analyze application metrics, acceptance rates, and enrollment trends.

2. Approval Process Requirements :

Implement an Approval process in Salesforce to review and approve Consulting Request. Set up email alerts to notify relevant students when he/she is approved or rejected. Ensure that request gets automatically submitted when it is created.

3. Consulting Services Management:

Prospective students should be able to request consulting services through the institute's website or portal. The consulting request form should capture student details, consulting preferences, and areas of expertise required. Submitted consulting requests should be recorded in the Salesforce CRM system. Consultants and advisors should receive automated email notifications for new consulting requests. Consultants should be able to view, accept, and manage consulting requests within the Salesforce CRM interface. Consulting appointment scheduling should be facilitated within Salesforce, including date, time, and purpose of the appointment. Appointment status (e.g., scheduled, completed, canceled) should be tracked and updated in Salesforce.

4. Immigration Case Management:

Students should be able to initiate immigration cases through the phone, email or web. The immigration case submission form should capture case details, and relevant information. Submitted immigration cases should be recorded and stored in the Salesforce CRM system. Immigration agents and case managers should receive automated email notifications for new immigration cases. Immigration agents should be able to view, process, and track immigration cases within the Salesforce CRM interface. Case status (e.g., open, in progress, closed) should be tracked and updated in Salesforce. Document management and collaboration tools should be integrated to facilitate case processing and communication.

3. Objectives

1. Streamline the admission process for prospective students.
2. Enhance the management of consulting services for students and advisors.
3. Improve immigration case management through efficient tracking and processing.
4. Provide real-time insights into operations through dashboards and reports.
5. Ensure transparency and automation in student communication.

4. Project Scope

The project includes:

- Creating objects and relationships in Salesforce.
- Configuring case management.
- Automating student and staff workflows.
- Developing Lightning Apps and Flows for enhanced usability.

5. Implementation Steps

1. Creating Objects from Spreadsheet

1. Create the Course Object :
 - Navigate to Object Manager → Create Object from Spreadsheet.
 - Upload the spreadsheet containing course details.
 - Map columns (e.g., *Course Name*, *Description*, *Duration*, etc.) to Salesforce fields.
 - Save the object after verifying field mapping.

B. Creating Remaining Objects

Additional objects required for the system:

- Admission Application: Captures student details, academic history, and program information.
- Consulting Request: Tracks consulting service requests, preferences, and advisor assignments.
- Immigration Case: Stores immigration case details and progress.

Each object was created by:

1. Navigating to Object Manager.
2. Selecting Create Custom Object.
3. Adding fields such as text, picklist, and date based on requirements.

C. Establishing Relationships Among Objects

- Steps:
 - Navigate to the parent object.

- Create a new field and select the relationship type.
- Map related fields to ensure data consistency.

D. Configuring the Case Object

- Configured the Case Object to handle immigration cases:
 - Customized page layouts for case fields (e.g., *Case Status*, *Priority*, *Assigned Agent*).
 - Added a document management tool for uploading case-related documents.
 - Enabled automated case assignment rules.

E. Creating a Lightning App (EduConsultPro)

- Steps:
 - Navigate to App Manager → New Lightning App.
 - Name the app *EduConsultPro*.
 - Add objects (*Admission Application*, *Consulting Request*, *Immigration Case*).
 - Assign the app to appropriate user profiles.

F. Automating Processes with Flows

1. Screen Flow for Student Admission Application:
 - Captures application details from prospective students.
 - Includes data validation and automated submission to the *Admission Application* object.

2. Student Admission Application Process :

- Create ScreenFlow:
 - Create a ScreenFlow using Flow Builder labeled as “Student Info”.
 - Add a Screen Element to collect student information and store it in a record variable (StudentRecordRes).
 - Use a Create Record element to save student information.
- Course Selection:
 - Add a Screen Element for course selection using a picklist (choices: IELTS,

GRE, GMAT, Duolingo, TOEFL).

- Include a Decision Element to handle course selection paths.
- Add Get Record elements to retrieve course details for selected options.
- Use Create Record elements to save registration details.
- Email Notification:
 - Create email text templates for registration confirmation.
 - Add an Action Element to send emails to students post-registration.
 - Include a Success Screen to display confirmation.

3. Create Users

- Add a user with the Standard Platform User profile under Setup → Users.
- Assign Manager settings for approver hierarchy under user settings.

4. Approval Process for Appointments

- Email Templates:
 - Create email templates for submission, approval, and rejection of appointment requests.
- Approval Workflow:
 - Configure the approval process for appointments:
 - Define the process using a standard manager hierarchy.
 - Add email alerts and field updates for each approval stage (submission, approval, rejection).

5. Record-Triggered Flow for Appointment Approval

- Configure a Record-Triggered Flow to automatically submit new appointments for approval.
- Add an Action Element (Submit for Approval) and activate the flow.

6. Appointment Booking for Existing Students

- Student Lookup:
 - Create a ScreenFlow for fetching existing student details based on name and email.
- Appointment Creation:

- Use Screen and Create Record elements to capture and save appointment details.
- Add a confirmation screen to display appointment details.

7. Combined ScreenFlow

- Integrate all flows into a single ScreenFlow:
 - Add a Welcome Screen and decision logic for new vs. existing students.
 - Include SubFlow elements for "New Student Flow" and "Existing Student Flow."
- Save and activate the combined flow as "EduConsultPro Flow".

8. Lightning App Page

- Create a Lightning App Page named EduConsultPro Home Page:
 - Add the "EduConsultPro Flow" to the page using the Flow component.
 - Assign the page to the Sales app and relevant profiles (e.g., System Administrator).

6. Expected Benefits

1. Efficiency

- Automated Workflows:
Automating tasks such as student registration, appointment scheduling, and approval processes minimizes manual intervention. This reduces the time required for repetitive tasks, enabling staff to focus on more strategic activities.
- Error Reduction:
By standardizing processes and using validation rules, the implementation eliminates common human errors, ensuring data consistency and reliability.

2. User Experience

- Intuitive Interfaces:
The ScreenFlows and Lightning App Page provide user-friendly interfaces,

making it easy for students to navigate through processes such as registration and booking appointments. Staff members also benefit from simplified task management workflows.

- **Streamlined Communication:**
Automated email notifications keep students informed at every stage of their journey, from registration confirmation to appointment scheduling, ensuring a positive and transparent user experience.

3. Transparency

- **Real-Time Updates:**
Students and staff can track the status of applications, approvals, and consulting requests in real time. This transparency fosters trust and enhances the overall service experience.
- **Approval Notifications:**
The approval process for appointments ensures clear communication of decisions, helping students stay informed and confident in their interactions with EduConsultPro.

4. Insights

- **Actionable Metrics:**
The centralized data repository enables the generation of detailed dashboards and reports, providing key insights into applications, consulting requests, and cases. These insights empower the institute to identify trends, optimize operations, and make informed decisions.
- **Performance Tracking:**
Staff and consultant performance can be monitored through the system, highlighting areas for improvement and recognizing outstanding contributions.

7. Conclusion

The Salesforce CRM implementation at EduConsultPro Institute marks a significant milestone in enhancing operational efficiency, improving user experience, and fostering informed decision-making. By automating critical processes such as student registration, appointment scheduling, and approval workflows, the system eliminates manual errors and streamlines tasks for staff. It provides students with a seamless and transparent experience through intuitive interfaces and real-time updates, building trust and engagement. Additionally, the centralized data management and analytics capabilities offer actionable insights, enabling the institute to track performance, identify trends, and make data-driven decisions. This scalable and user-friendly solution not only addresses existing challenges but also positions EduConsultPro for sustained growth and success, reinforcing its commitment to delivering exceptional support and guidance to its students.