A CRM Application To Manage The Services Offered By Institution

By

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1. Project Overview

EduConsultPro Institute, a leading educational institution offering diverse courses and programs, faces challenges in efficiently managing its growing number of admission inquiries, student engagements, and consulting services. With the increasing number of prospective students each year, it becomes essential to streamline the process to provide a better experience for both students and staff.

This project leverages **Salesforce CRM** to address these challenges, focusing on improving the **admission process, student inquiry management**, and **consulting services**. By adopting Salesforce, EduConsultPro aims to create a seamless, transparent, and efficient experience for prospective students while enabling admissions staff to manage applications, inquiries, and cases with enhanced productivity.

2. Objectives

Business Goals:

- To optimize the admission and consulting processes at EduConsultPro Institute.
- Enhance the operational efficiency of managing student inquiries, applications, and case management.
- Deliver a superior experience for students by automating processes and improving communication.

Specific Outcomes:

- A unified system for managing admissions, inquiries, and consulting services.
- Automation of student admission applications and consulting approval workflows.
- Centralized management of immigration cases and tracking.

3. Salesforce Key Features and Concepts Utilized

- **Admission Application Management**: Streamlined capture and processing of admission applications.
- **Consulting Services Management**: Automated management of student requests for expert consulting services.
- **Approval Process for Consulting Requests**: Automated workflows for approval of student consulting requests.
- **Immigration Case Management**: Tracking and management of immigration or visa cases through Salesforce CRM.
- **Custom Objects and Relationships**: Created custom objects like **Student, Consultant, Course, Appointment**, and **Case**. Defined relationships between these objects to enable efficient data linking, such as connecting a student's application to their consultant and course selection.
- **Screen Flows for Streamlined Processes**: Built custom **Screen Flows** to guide students through multi-step processes like filling out applications, selecting courses, and booking appointments. These flows reduce manual data entry and ensure a smooth user experience.
- **Email Automation**: Configured automated email notifications for important milestones, such as confirming application submissions, consulting appointments, and immigration case updates. This keeps students informed at every stage.
- **Reports and Dashboards**: Created customized reports and dashboards for admissions staff to track key metrics, such as application volumes, approval rates, and consultant availability. This allows for better decision-making based on real-time data.
- **Lightning App Customization**: Designed a custom **Lightning App** tailored to EduConsultPro's needs, including specific tabs for **Students, Courses, Consultants, Appointments**, and **Cases**, providing staff with easy access to all relevant information in one place.

4. **Detailed Steps to Solution Design**

Topic No.	Topic Name
1	**Requirements:** 1.1 Admission Application Management 1.2 Approval Process for Consulting Requests 1.3 Consulting Services Management 1.4 Immigration Case Management
2	**Creating Objects from Spreadsheets:** 2.1 Course Object 2.2 Create Remaining Objects 2.3 Create Relationship Among The Objects 2.4 Configure the Case Object 2.5 Create a Lightning App
3	**Create a Screen Flow For Student Admission Application Process:** 3.1 Student Info Screen 3.2 Create Student Record 3.3 Course Selection Screen 3.4 Decision and Get Rec Elements 3.5 Creating Registration Records 3.6 Send Confirmation Emails
4	**Creating Users and Configuring User Settings:** 4.1 User Creation 4.2 Approval Settings

1. Requirements

a. Admission Application Management

Prospective students can fill out and submit their admission applications on the institute's website. Once submitted, their details are stored in Salesforce CRM. Students will receive an automatic email confirming their application, and Admissions staff can use Salesforce to generate reports and dashboards to analyse metrics like application volume, acceptance rates, and enrolment trends.

b. Approval Process for Consulting Requests

In Salesforce, create an approvalprocess to review and approveconsulting requests. Set up email alerts to notify students of their request's approval or rejection. Ensure that each consulting request is automatically submitted as soon as it is created.

c. Consulting Services Management

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Students can requestconsulting services throughthe institute's website.The request form collects their details, preferences, and needed expertise. Submitted requests are recorded in Salesforce CRM, and consultants receive automatic notifications. Consultants can view, accept, and manage these requests in Salesforce, including scheduling and tracking appointments.

d. Immigration Case Management

Students can start immigration cases via phone, email, or online. The details are captured in a form and stored in Salesforce CRM. Automated emails notify immigration agents of new cases. Agents can view, process, and track cases in Salesforce, with statuses updated as the case progresses. Document management tools are also integrated for efficient case processing and communication.

2. Creating Objects from Spreadsheets

Objects in Salesforce are database tables that allow you to store data specific to your organization. Each object comprises records (rows) and fields (columns) that help organize and structure your data efficiently. We use objects to manage and relate various types of information, enabling seamless data tracking, reporting, and analysis within the Salesforce platform.

To createobjects from spreadsheets in Salesforce, followthese steps:

1. **Prepare Your Spreadsheet** : Organizeyour spreadsheet data so that each column corresponds to a field in Salesforce, and each row represents a record. Ensure the data is clean and well-structured.

2. **Save the Spreadsheet** : Save the file in a compatible format,typically as a CSV (Comma Separated Values).

3. **Log in to Salesforce** : Access your Salesforce accountand navigate to the Setup menu.

4. **Use the Data ImportWizard** : In the Setup menu, locate and open the Data Import Wizard. Choose the standard or custom object you want to create records for.

5. **Upload Your Spreadsheet** : Followthe wizard’s instructions to upload your CSVfile, mapping the spreadsheet columnsto the appropriate Salesforce fields.

6. **Start the Import** : Review the mappings,then begin the import process.Salesforce will createrecords based on the data in your spreadsheet, enabling you to manage and analyse the information within the platform.

2.1-Create CourseObject :

Course Object : It Stores detailed information about each course, such as its description, duration, and associated instructors, enabling efficient tracking and management of educational services.

i. Navigate to Object Manager

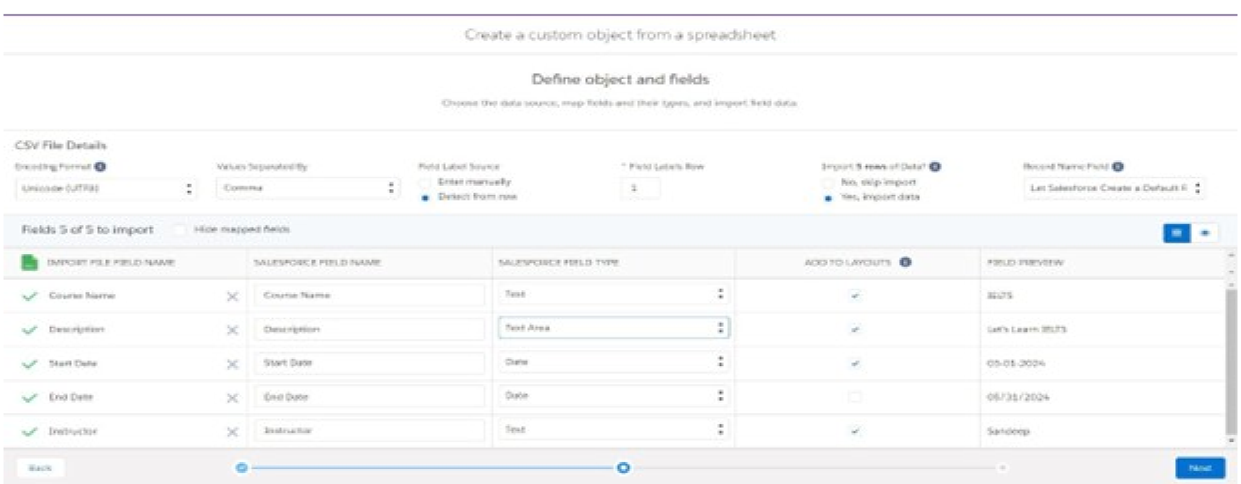
1. Log in to your Salesforce instance.
2. Go to the Object Managertab in Salesforce setup.

1. Create Object from Spreadsheet

1. Click on "Create Object from Spreadsheet."
2. Download the Coursespreadsheet via the provided link.
3. Upload the downloaded file to Salesforce.

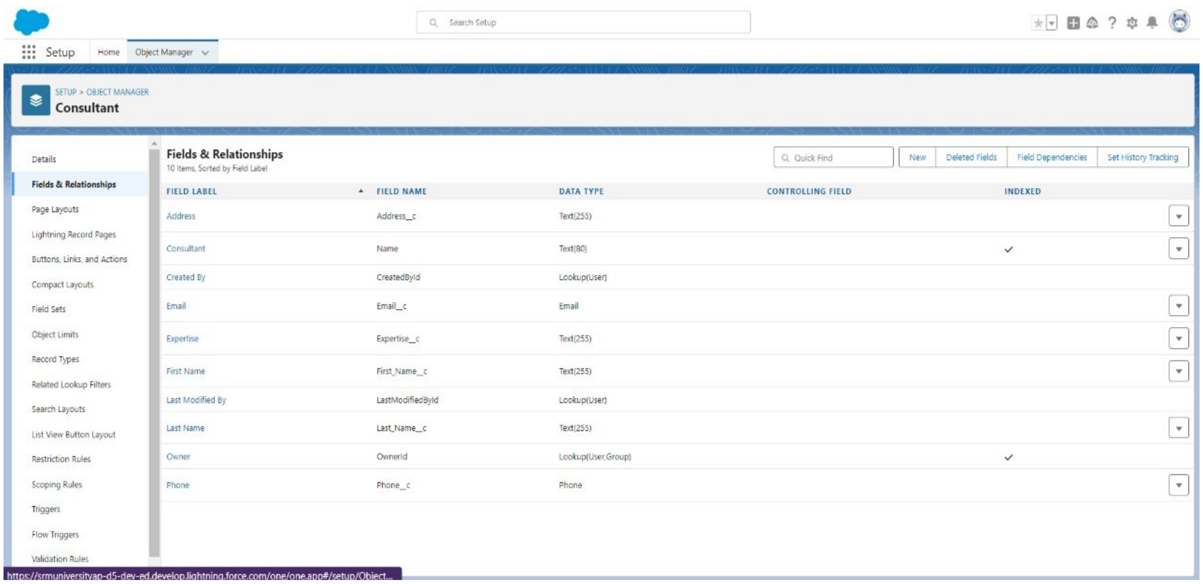
2. Map Fields

1. Map the fieldsfrom the spreadsheet to the Salesforce object fields.
2. Review and finalisethe field mapping.
3. Upload the data to createthe Course object.

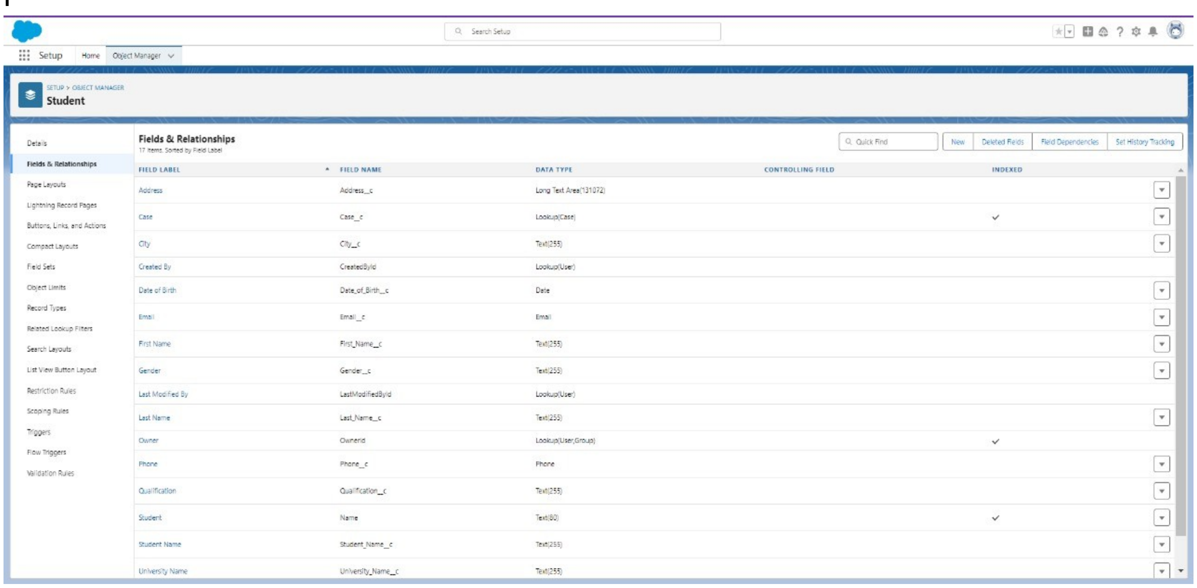


2.2-Create RemainingObjects :

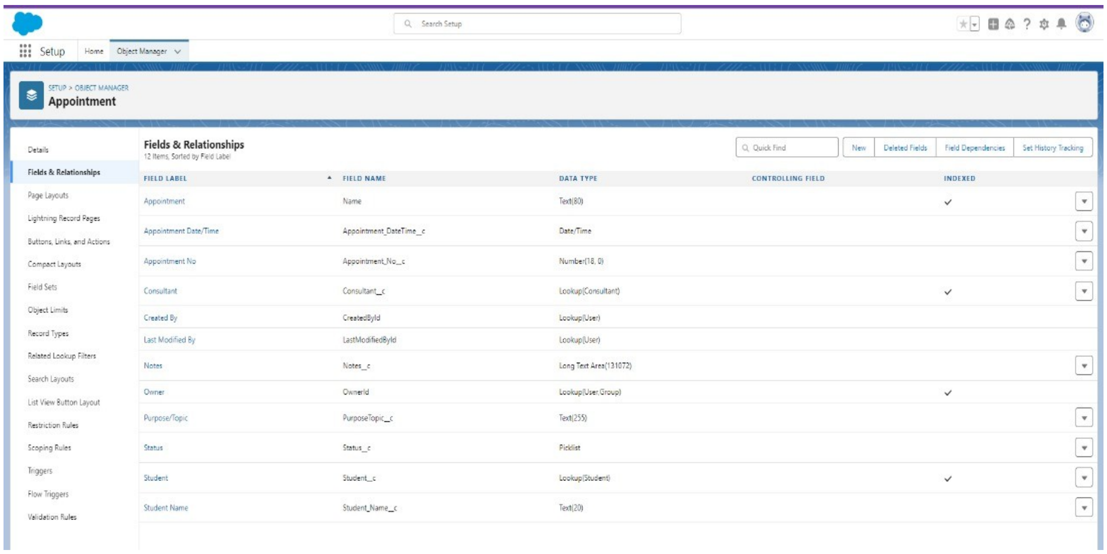
Consultant Object : It Stores details about consultants, including their expertise, availability, and assigned courses, to manage and allocate resources effectivly.



Student Object : It Contains detailed student information, including enrollment records, contact details, and course registrations, enabling efficient tracking and personalized communication.

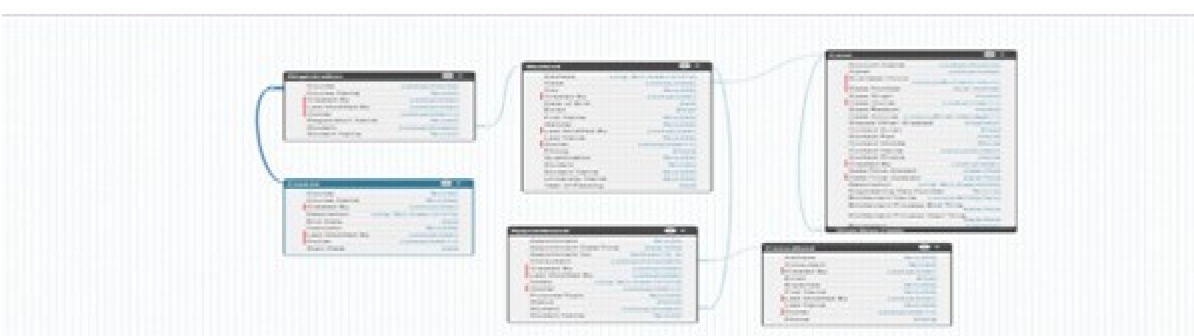


Appointment Object : Oversees scheduled meetings or sessions by tracking key details such as date, time, participants, and purpose, ensuring smooth and efficient coordination between students and consultants.



2.3-Create Relationship Among the Objects : It refers to establishing connections betweendifferent objects in a Salesforce database. These relationships define how the data in one object relates to data in another, enabling you to link records across objects for better organization, data integrity, and reporting.In this Includes :

1. **Lookup Relationships**: Link each appointment to a specific student and also link each appointment to a specific consultant.
2. **Create a Registration Object**: Storesdetails about studentsand their course enrolments.
3. **Create a Lookup**: Link Student and Case to store the student queriesfor immigration or visa application.



2.4-Configure the Case Object :

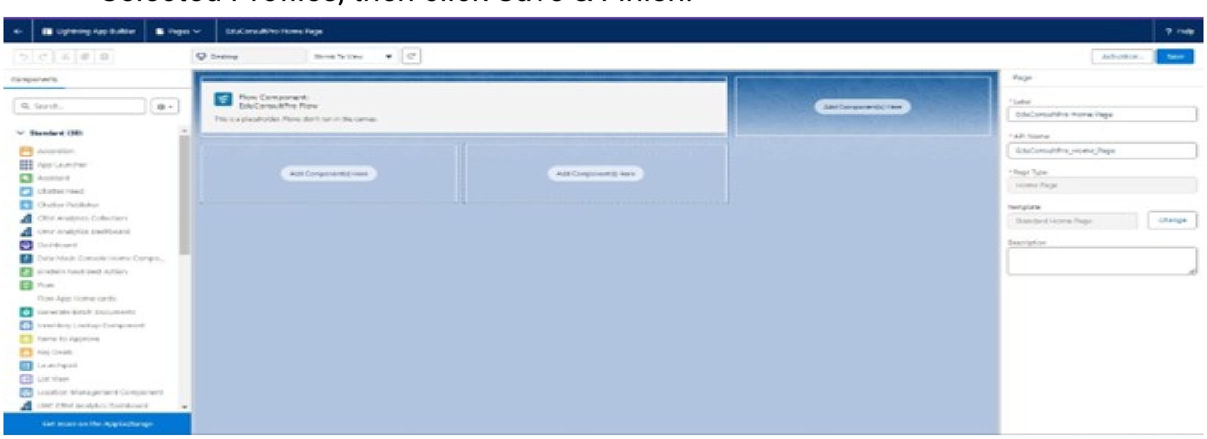
It involves customising the Case objectin Salesforce to fit your organization's needs. This typically includes:

1. Go to the object managerand edit the case object.
2. Select the "Type" field and add the valuesin it. a)Immigration b) Visa Application
3. Now Select the "Status" field and add the valuesin it.
    a. Open b)In-progress

2.5 - Createa Lightning App :

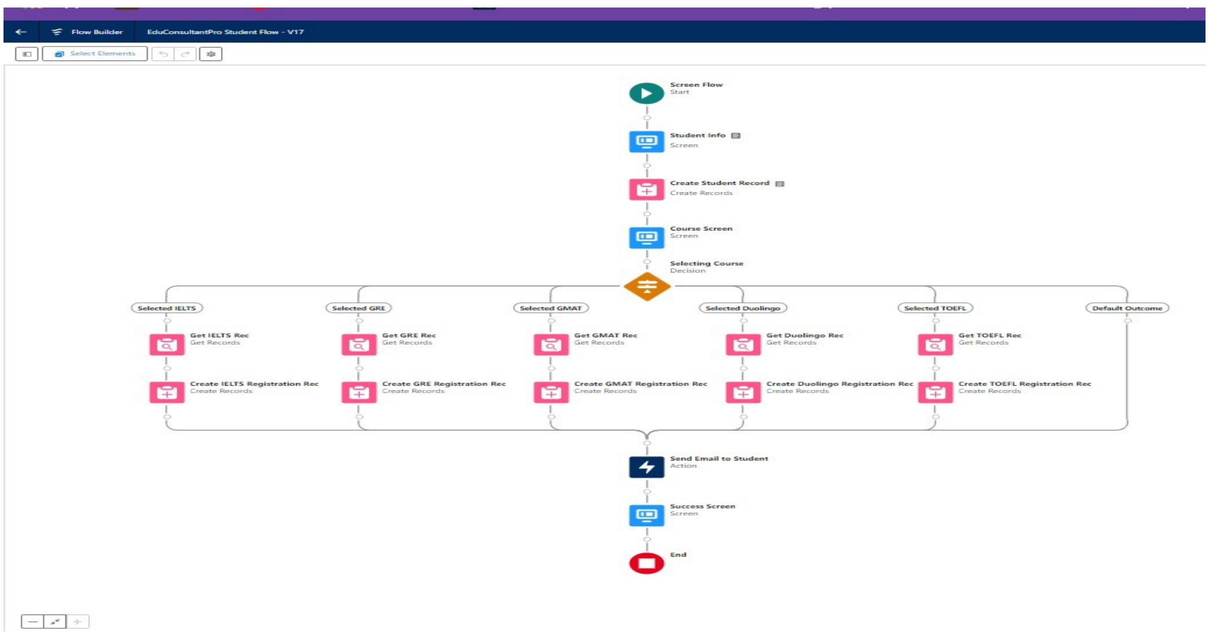
A Lightning App in Salesforce is a custom application built using the Lightning Experience interface. It allows users to group related features, objects, and components into a cohesive, personalized workspace.

1. Go to Setup,search for "App Manager" in Quick Find.
2. Click on "New Lightning App.
3. Enter the app name as "EduConsultPro," then click Next,Next, Next.
4. Add Home, Students, Courses,Consultants, Appointments, Registrations, and Cases from Available Items to Selected Items.
5. Add the "System Administrator" profile from Available Profiles to Selected Profiles, then click Save & Finish.



3. Create a Screen Flow For StudentAdmission Application Process:

The ScreenFlow for the Student Admission Application Process is a powerful tool in your CRM application designed to manage the services offered by an institution. It streamlines the entire admission process by automating data collection, course selection, and record creation. This automation reduces manual data entry errors, saves time, and ensures a consistent process for all applicants. It also allows for immediate feedback and communication with prospective students, improving their overall experience. By centralizing and organizing data, the institution can more efficiently manage student information, track admissions, and provide tailored educational services. This leads to enhanced operational efficiency and better service delivery.



3.1-Student Info Screen:

1. Open Flow Builder and start a new Screen Flow.
2. Add a Screen elementlabeled “Student Info.”
3. Create a record variable named "StudentRecordRes" to capture all fields from the Student object.Drag required fields (like name, email, etc.) from the Student object to the screen to collect student information.

3.2-Create Student Record:

1. After the "Student Info" screen element, drag and drop a "Create Records" element onto the canvas and name it "Create Student Record."
2. Select "One" for the number of recordsto create.
3. Choose "Use all values from a record" for setting the record fields.
4. Choose the "StudentRecordRes" recordvariable created in the previousscreen to create the new Student record.Save the configured element.

3.3- Course Selection Screen:

5. After the "Create StudentRecord" element, drag and drop a "Screen" element onto the canvas and label it as “Course Screen.”
6. From the left side panel, drag a picklistcomponent onto the screen and label it as “Select Course.”
7. Under choices, type “IELTS” and press enter to create a variable named IELTS. Repeat the process for “GRE,” “GMAT,”“Duo lingo,” and “TOEFL.”
8. Save your changes.

3.4-Decision and Get Rec Elements:

9. Drag and drop a "Decision" elementonto the canvasafter the "Course Screen" element.
10. Label this element as "Selecting Course."
11. Under "Outcomes," create the first outcome and label it “Selected IELTS.”
12. Configure the condition as:
    a. **Resource**: Select_Course (the picklist componentfrom the "Course Screen" element)
    b. **Operator**: Equals
    c. **Value**: IELTS (the choice variable from the "Course Screen" element)
13. Click the “+” icon to add more outcomes.
14. Repeat the configuration from Step 2 for each of the following options:
    a. GRE
    b. GMAT
    c. DuoLingo
    d. TOEFL

15. Once all outcomes are configured, click"Done" to completethe setup of the "Selecting Course" Decision element,and Save your changes.
16. After the "Selecting Course" Decision element, under the IELTS path, drag and drop a "GET Record" element.
17. Label this element “Get IELTS Rec.”
18. **Object**: Select "Course."
19. **Condition Requirements**: Set to "All Conditions are Met (AND)."
20. **Configure Field**:Set "Course Name" as the field,"Equals" as the operator, and the value to {!Select_Course}.For each of the other paths (GRE, GMAT, DuoLingo, TOEFL), repeat the steps to configure GET Record elements:
21. Adjust the label to correspond to the course (e.g., “Get GRE Rec,” “Get GMAT Rec,” etc.).
22. Use the same "Course" object and set the "Course Name" field condition accordingly.
23. Save the configured elementsto ensure all paths and conditions are correctly set up.

3.5-Creating Registration Records :

24. After the "Get IELTS Rec" element,add a "Create Records" elementlabeled “Create IELTS Registration Rec.”

Configuration:

a. **Records to Create**: Select “One.”
b. **Field Setting**: Choose“Use separate resources and literal values.”
c. **Object**: Set to "Registration."
d. **Fields**:**Course_Name__c**: {!Get_IELTS_Rec.Id},**Student_Name__c**:{!StudentRecordRes.Id} Repeat the above steps for GRE, GMAT, TOEFL, and DuoLingo paths, adjusting labels accordingly (e.g., “Create GRE Registration Rec”).

3.6 Send Confirmation Emails :

1. After all Decision paths, add an Action elementlabeled “Send Email to Student.”
2. **Configuration**:
   a. **Body**: {!StuRegistrationEmailTextTempBody}
   b. **Recipient Address List**: {!StudentRecordRes.Email__c}
   c. **Subject**: {!StuRegistrationEmailTextTempSub}
3. After the email Action, add a Screenelement labeled “SuccessScreen.”
4. Drag a "Display Text" component, label it “SuccessMessage,” and add the Success text in the Resource picker box.

Click “Done” and save the flow as “EduConsultPro Student Flow.”

4. Creating Users and Configuring User Settings:

Creating Users: Setting up individual accountsin Salesforce, including details like name, email, and profile, to grant access and define permissions.

Configuring User Settings: Customizing user access,roles, and personalsettings in Salesforce to ensure appropriate data visibility and functionality based on their job requirements.

4.1-User Creation

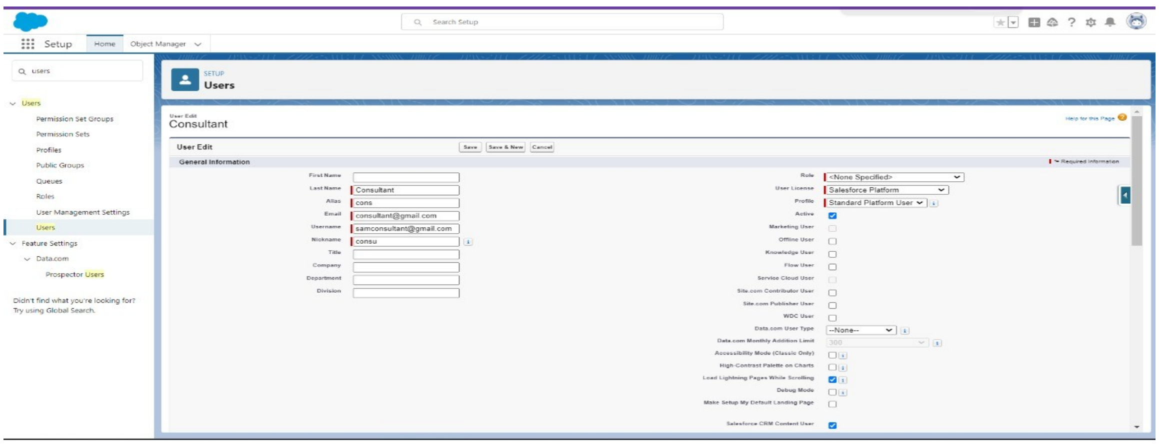
Create a New User :

1. Navigate to **Setup** → **Administration** → **Users** → **New User**.
2. Enter the followingdetails:
   a. **Last Name**: Consultant
   b. **License**: Salesforce Platform
   c. **Profile**:Standard PlatformUser
3. Fill in all mandatory fields.
4. Click **Save**.

4.2 -Approval Settings

Configure User Settings :

1. Go to **Setup** → **Administration** → **Users**.
2. Click **Edit** next to your name.
3. Scroll down to the bottom and, under **Approver Settings**, select “Consultant” in the **Manager** field.



4. Click **Save**.

5. Approval Process For Appointment Object :

5.1 Email Template

Enable Lightning Email Templates:Now,we implemented a structured approachto managing email templates in Salesforce:

Enable and CreateLightning Email Templates:

i. Goto Setup,Enter "Templates" in the QuickFind box and select Lightning Email Templates and clickToggle the feature on.

ii. Open the App Launcherand search for "Email Templates",Click

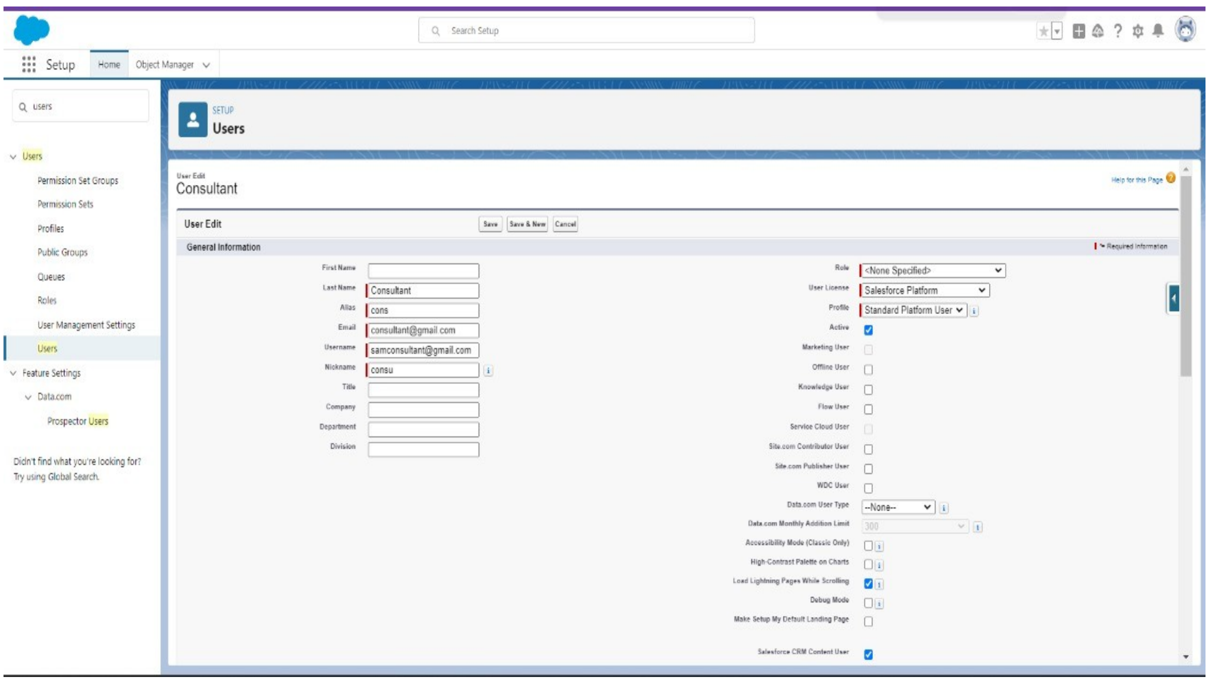
Create New Folder, name the folder, and click Save.

iii. Click New Email Template,Choose the folder createdearlier,Name the template "**Submission Template**".Enter the content in the HTML Value field and Click Save.

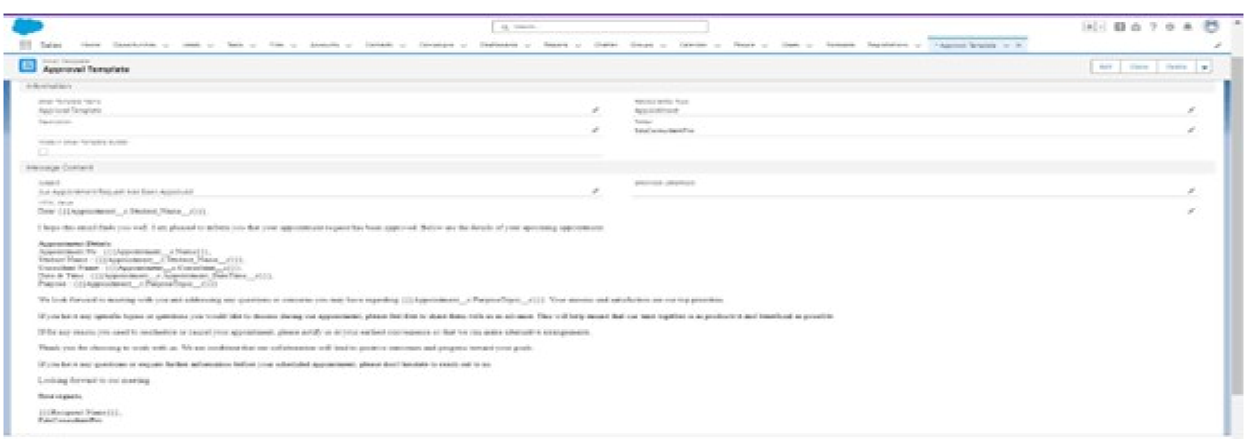
iv. Repeat the process to create two more templates:

1. One for **Approval**,One for **Rejection**,enter content for each template accordingly.Save each template
2.

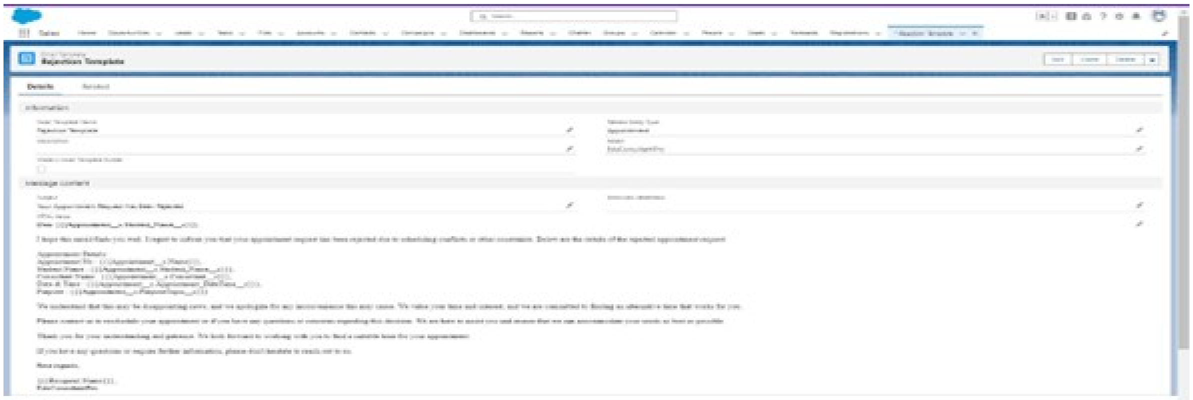
1. Submission Template :



2. Approval Template :



3.Rejection Template



5.2. Approval Process Configuration:

To create a new approvalprocess in Salesforce.Firstly,Go to Setup and Enter "approval" in the Quick Find box and select Approval Processes.

i. Set the Process Name to "**Appointment Approval**."

ii. Configure Approvers Under SelectApprover, choose Managerfor the option: "Automatically Assign an Approver Using a Standard or Custom Hierarchy Field."

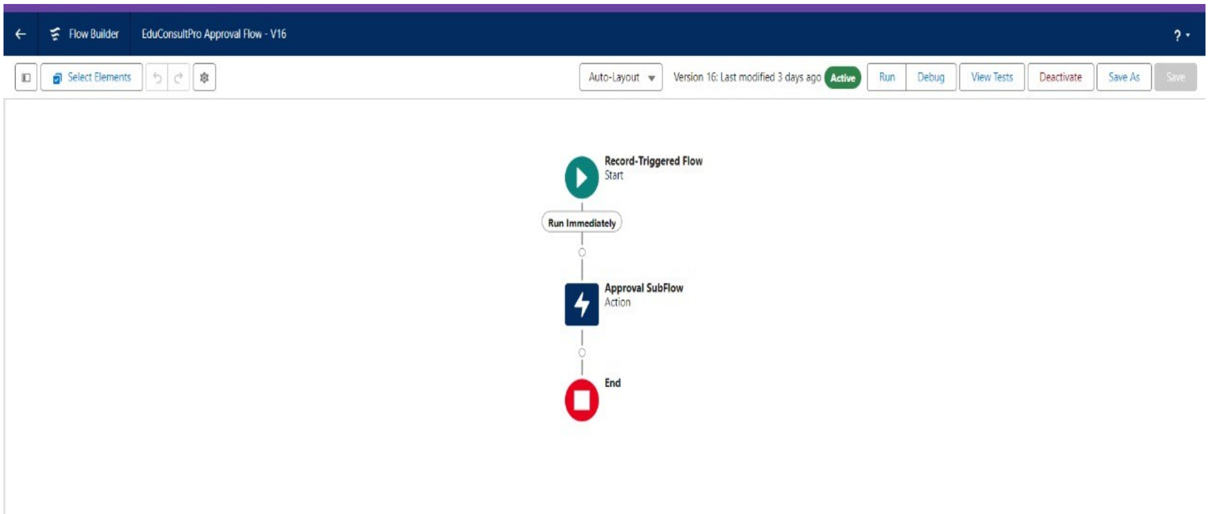
iii. Record Auditability Properties, chooseAdministrators or the Currently Assigned Approver Can Edit Records During the Approval Process.

iv. Save the Approval Proces

Configure InitialSubmission Actions:Click View ApprovalProcess Detail Page,Under Initial Submission Actions, ClickAdd New:Choose FieldUpdate And Configure It With The Necessary Values and also Click Add New Again And Select Email Alert:

1. Description: Enter "submission Email Alert."
2. Unique Name: This Will Auto-populate.
3. Email Template: Choose "submission Template."
4. Recipient Type: Select Your Name.Click Save. **Configure Final Actions** : Repeat the same processfor Final Rejection Actions, Add Appropriate Field Updates And Email Alerts For Each Action.Use Suitable Descriptions.

6. Create A Record Triggered Flow



6.1 Configure The Start Element:

i. Click on the gear icon in the top-right corner of Salesforce and select "Setup." In the Quick Find box on the left side of the Setup page, type “flows.”Click on“Flows” under the "Process Automation" section.

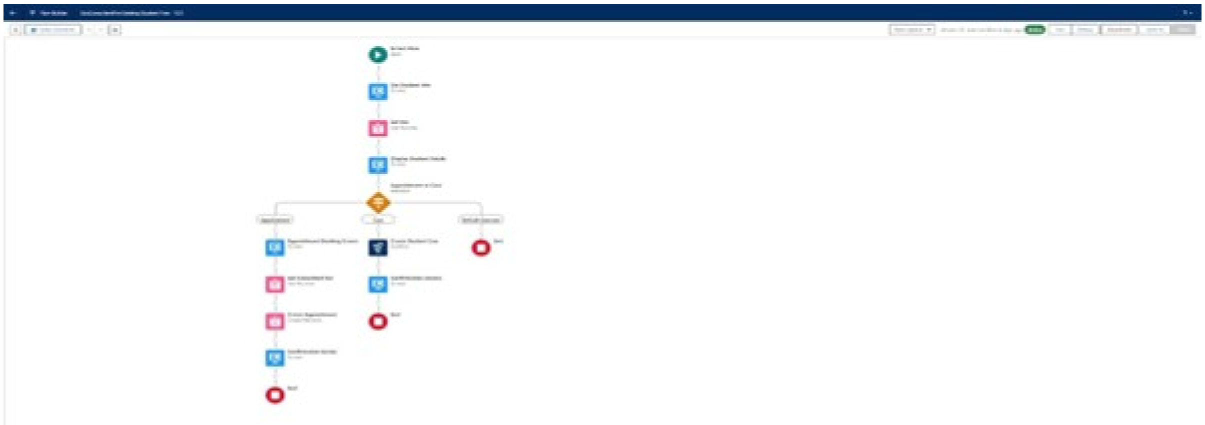
ii. On the Flows page, click the “New Flow” button.Select “Record-Triggered Flow” from the list of flow types.Click the “Create” button to start building your flow.You will be prompted to configure the Start element of your flow.For the “Object” field, choose “Appointment” from the dropdown menu.

iii. This specifies that the flow will triggeron changes to Appointment records.Select “A Record Is Created”to specify that the flow should run whenever a new Appointment record is created.

6.2-Add An Action Element :

Drag and drop an Action element onto the flow canvas after the Start element.Select "Submit for Approval" action and label it as “Approval Subflow.”Set the Record ID field to “{!$record.Id}.”Save the flow with the label "educonsultpro Approval Flow" and click Activate.

7. Create a ScreenFlow for Existing Studentto Book an Appointment



To create a Screen Flow for existingstudents to book an appointment in Salesforce :

7.1-Get StudentInfo Screen :

1. From Setup, enter “FlowBuilder” in the Quick Find box,Select “New Flow” and choose “Screen Flow",Click "+" Add Element and Select “Screen”from the list of elements.

2. In the Screen Properties pane, set the Label to “Get Student Info",Drag and

   drop two “Text” components from the left side panel onto the screen,Label the first Text component as “Enter Student Name",Label the second Text component as “EnterStudent Email.”Click “Done”to save the screen configuration.

7.2-Get Record Elements :

3. After the Decision element,under the IELTS path, click“+ Add Element.” Select “Get Records” and label it as “Get Rec".

4. Configure the GET RecordElement for Object:Select “Student.” and Condition Requirement : Choose “All Conditions are Met (AND).”

5. Set Conditions for Field: StudentName,Operator: Equals and Value:

   {!Enter_Student_Name}

Field: Email__c,Operator : Equals,Value: {!Enter_Student_Email}

7.3-Add Decision Element :

6. Add a Decision Elementafter Select DisplayStudent Details Element,label it as "Appointment or Case".

7. Under outcome, label it as "Appointment" and write the condition such as below-**Resource** : {!How_may_I_Help_you},**Operator** : Equals

   Value : {!Book_an_Appointment},Click on the "+" icon and Repeat for case.

7.4-Add Screen Element:

1. Add a Screen elementafter the DecisionElement, on the Appointment path, and label it as "**Appointment Booking Screen**".

2. Click on Fields, clickon the record variable inputand create a new Resource (AppointmentRecordRes) to display all the fields which are in the

   Appointment object.
3. Drag all the fields which are needed to add on the screen in order to collect the student information.

7.5-Create Appointment Record using CreateRecords Element

Add a Create element after the Get Consultant Rec element and label it as "**Create Appointment**".Select "one" under How many recordsto Create, and select "Use separate resources and literal values" under How to Set the record fields.
Select Object : Appointment

1. **Field** : Appointment_DateTime__c

   Value : {!AppointmentRecordRes.Appointment_DateTime__c}
2. **Field** : Consultant__c

   Value : {!Get_Consultant_Rec.Id}
3. **Field** : Notes__c

   Value : {!AppointmentRecordRes.Notes__c}
4. **Field** : PurposeTopic__c

   Value : {!AppointmentRecordRes.PurposeTopic_c}

5. **Field** : Student_Name__c

    Value : {!Get_Rec.Id}

7.6-Add ScreenElement :

4. After the “Send Email to Student” Action element, click the “+ Add Element” button,Select “Screen” from the list of elements,Label the Screen elementas “Confirmation Screen".From the Left Side Panel Search for the “Display Text” component and drag it onto the main panelof the Screen element.Label the Display Text Component Enter “Appointment_Confirmation” as the label.

5. Set Up the DisplayText :

    Consultant Name:{!Get_Consultant_Rec.Name}

    Date & Time:{!AppointmentRecordRes.Appointment_DateTime_c}
    Notes: {!AppointmentRecordRes.Notes_c}

6. Click “Done” to save the configuration of the Screenelement.

7.7-Add an SubFlow Element:

1. Add a sub flow element after the DecisionElement, on the Case path, and search and Select for “Create a Case”, label it as “**Create Student Case**”.

2. Save the flow and label it as “**EduConsultantPro ExistingStudent Flow**”, you can use the below image for reference.

8.Createa ScreenFlow to Combine all the flows at one place

8.1-Add ScreenElement :

1. Goto the Flow Builder where you're workingon your Salesforce FlowIn the left side panel, find the "Elements" section,Drag and drop the "Screen" elementinto the main panel,Click on the newly added Screen element,In the properties pane on the right,set the "Label" to "Welcome Screen".
2. Inside the "Welcome Screen" configuration, locate the "Display Text" component in the left side panel under "Components".
3. Drag and drop the "Display Text" component onto the main panel of the

   Screen element.Click on the DisplayText component you just added.Inthe properties pane on the right,set the "Label" to "SuccessMessage".Enter the textyou want to display in the "Text" field ,Save your changes to the Flow.Make sure to connect this Screen elementappropriately with other elements in your Flow as needed.

8.2-Add Screen Element

1. Goto the Flow Builder whereyou're working on your Salesforce Flow.In the left side panel, find the "Elements" section.Drag and drop the "Screen" element onto the main panel, placingit after the existing "Welcome Screen" element.
2. Click on the newlyadded Screen element,In the properties pane on the right, set the "Label" to "Existing or New Student Confirmation Screen".
3. Inside the "Existing or New Student Confirmation Screen" configuration, locate the "Radio Buttons" component in the left side panel under

   "Components".Drag and drop the "Radio Buttons" component onto the main panel of the Screen element.
4. Click on the RadioButtons component you just added.Inthe properties pane onthe right, set the "Label" to "Are you an ExistingStudent".Click on "Add

   Choice" to createa new choice.In the inputfield that appears,type "Yes".Click "Create Yes choice" to add this choice to the radio buttons.Repeat step 6 to add another choice with the label "No".

5. Click "Create No choice" to add this choice to the radiobuttons.Click "Done" to finalise the configuration of the Screen element.

6. Save your changes to the Flow.

Ensure you connectthis Screen elementappropriately with otherelements in your Flow as needed.

8.3-Add DecisionElement :

7. After the “Existing or New StudentConfirmation” Screen Element,click the “+” icon.
   Select “Decision” from the menu,Label this Decision element as “Decision 1.”
8. Inthe Outcomes section,click “Add Outcome.”Label the Outcome: Enter“If Existing Student.”Set Condition :Resource:
   {!Are_you_a_Existing_Student},Operator: Equals,Value: {!Yes},Click the “+” icon to add another outcome

9. Enter “If Not ExistingStudent.” and Set Condition:

   a. **Resource**: {!Are_you_a_Existing_Student}
   b. **Operator**: Equals
   c. **Value**: {!No}
10. Double-check the outcomes and conditions to ensure they are correctly configured. Click “Done” to save the Decision element configuration.

8.4-Add an SubFlow

11. Goto the Flow Builder where you’re workingon your Salesforce Flow.
    Find the "Elements" section in the left side panel.

12. Drag and drop the "Sub flow" element onto the main panel, placing it after the

    "Decision 1"element on the "Existing Student" path.Click on the Subflow element you just added.

1. Inthe properties pane on the right, click on the "Sub flow" dropdown to search and select the "EduConsultantPro Existing Student Flow".

   Set the "Label" to "**ExistingStudent Flow**".Save your changes to the Flow, Label the Flow as "**EduConsultantPro Existing Student Flow**"

2. Click "Done" to finalise the configuration of the Sub flow element.

3. Ensure the Sub flow element is connected appropriately with other elements in your Flow as needed.

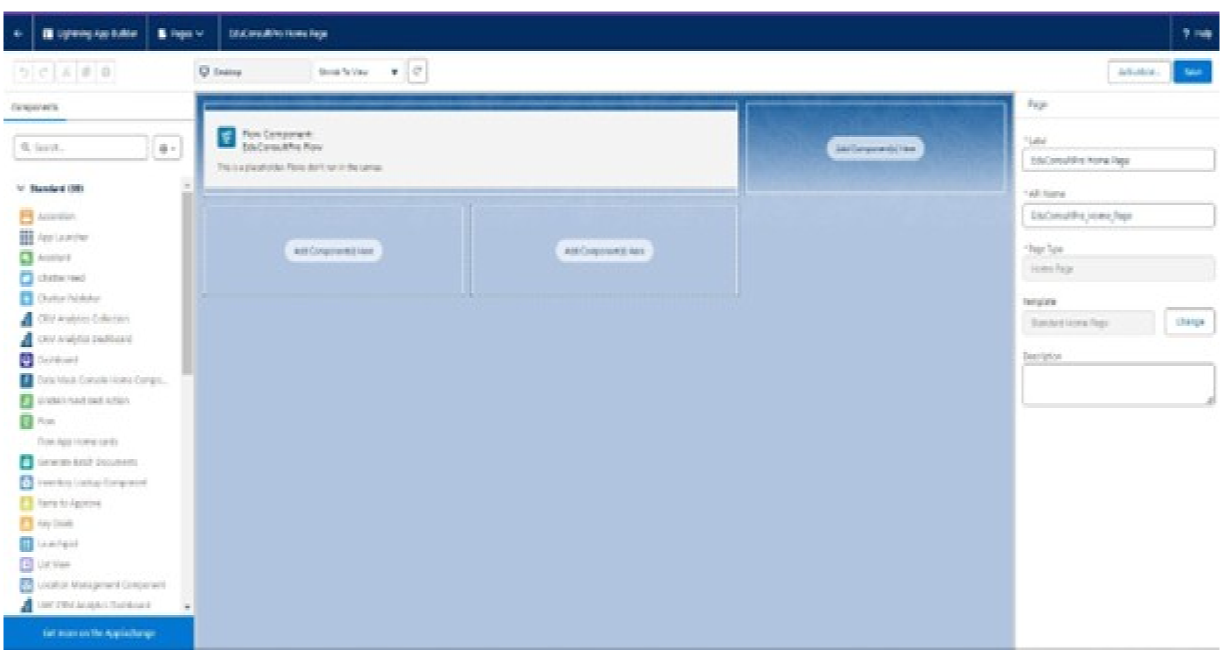
9. Creating a Lightning App Page

1. From Setup, type App Builder in the Quick Find box and select Lightning App Builder. Click NewChoose Home Page and click Next.

2. Name the page “EduConsultPro Home Page”, select the StandardHome Page template, and click Done.Drag the Flow component to the top-right region of the page layout.Search for “**EduConsultantPro Flow**” in the component list.

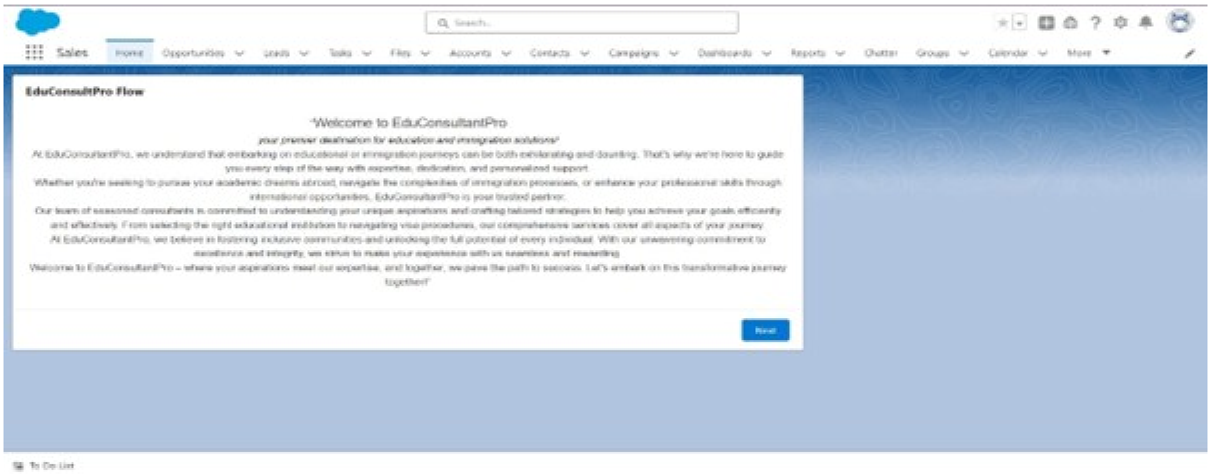
3. Click Save and Activate.Choose App and Profile, then click Assignto Apps and Profiles.

Select the Sales app and click Next,Scroll through the profiles and select System Administrator, then click Next,Review the assignment and click Save

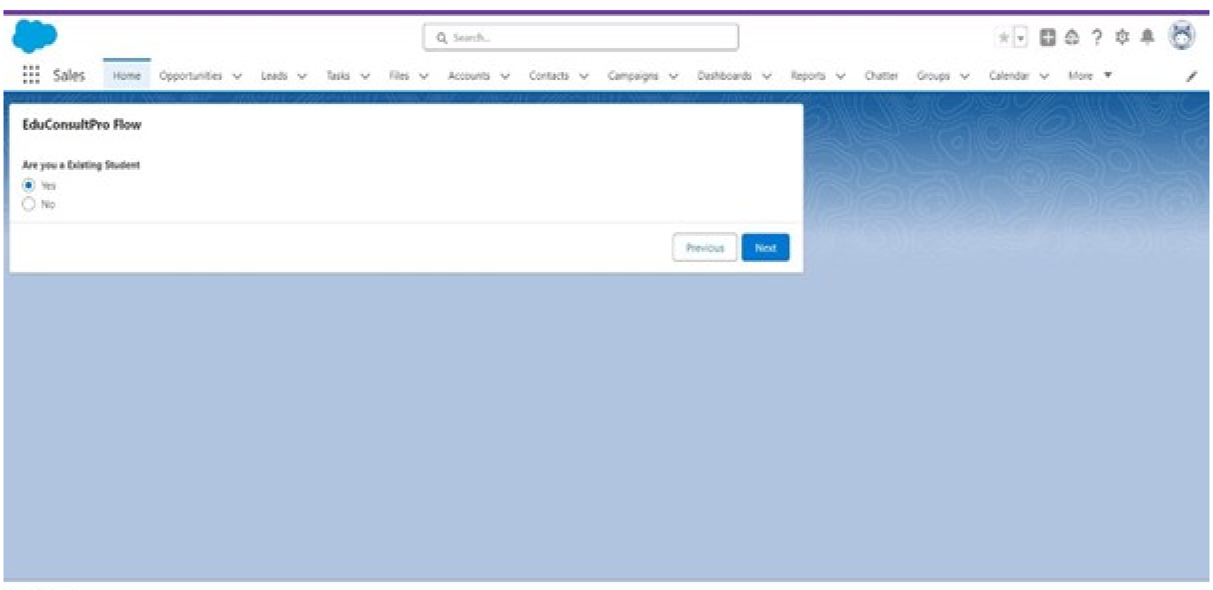


10.Output:

EduConsultantPro is a platform for expert guidancein education and immigration, offering personalized support to help you achieve your academic and professional aspirations abroad. Our dedicated team ensures a seamless and rewarding journey, from selecting institutions to navigating visa processes.

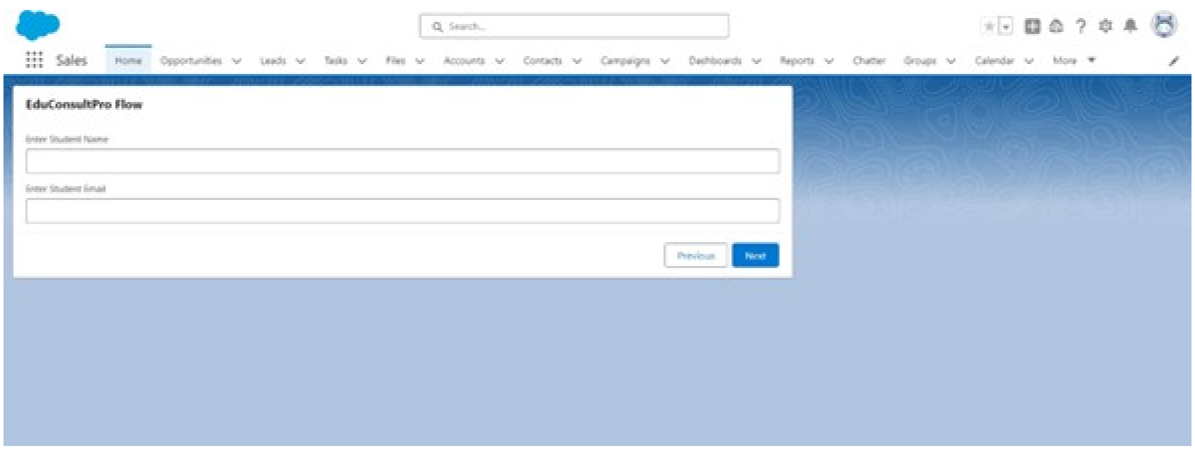


Are u existingstudent YES?

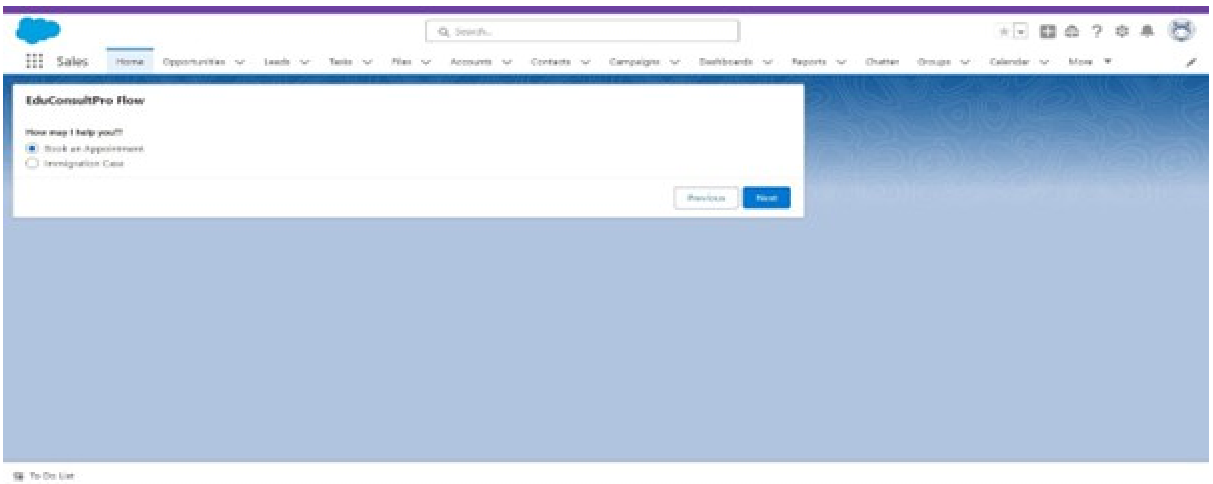


It has two input fields labeled:

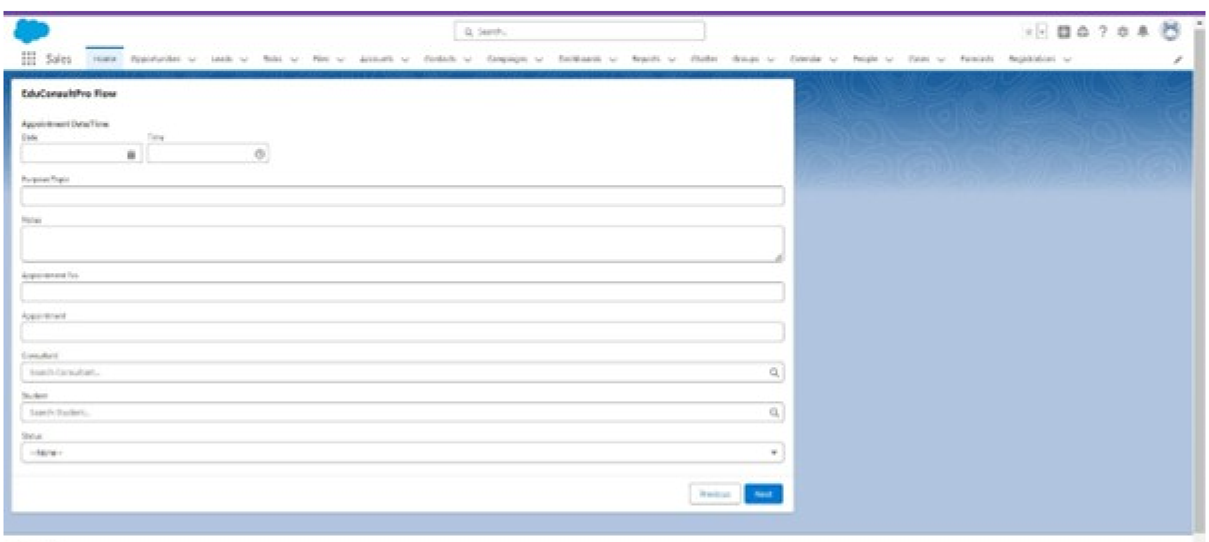
1. **Enter StudentName** - A text field for inputting the student's name.
2. **Enter Student Email** - A text fieldfor entering the student's emailaddress.



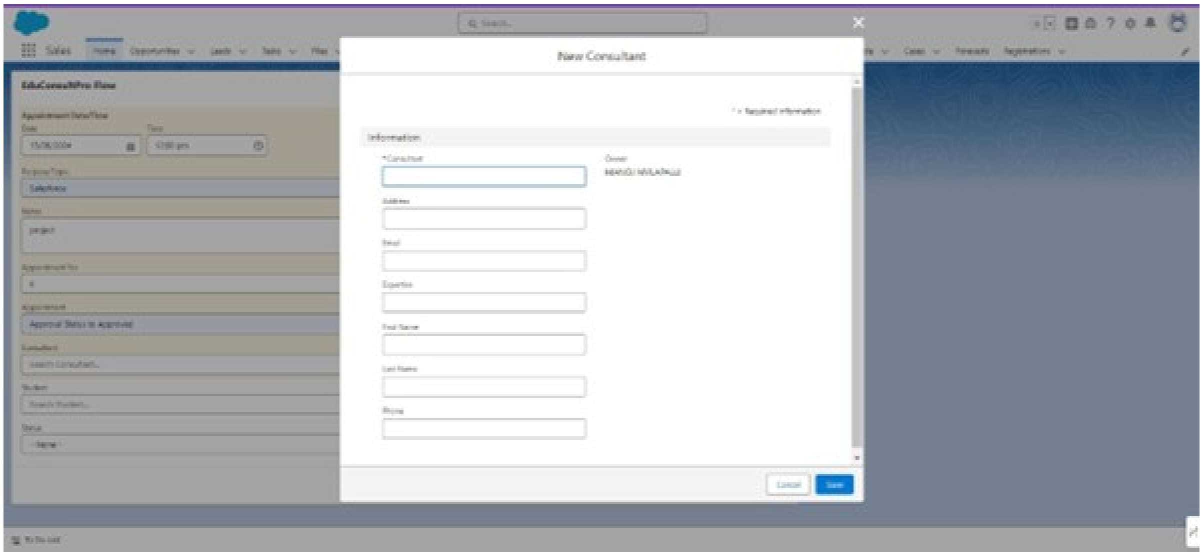
The EduConsultantPro Flow allows users to either**Book an appointment** orinitiate an **immigration case**, streamlining the process for personalized support.

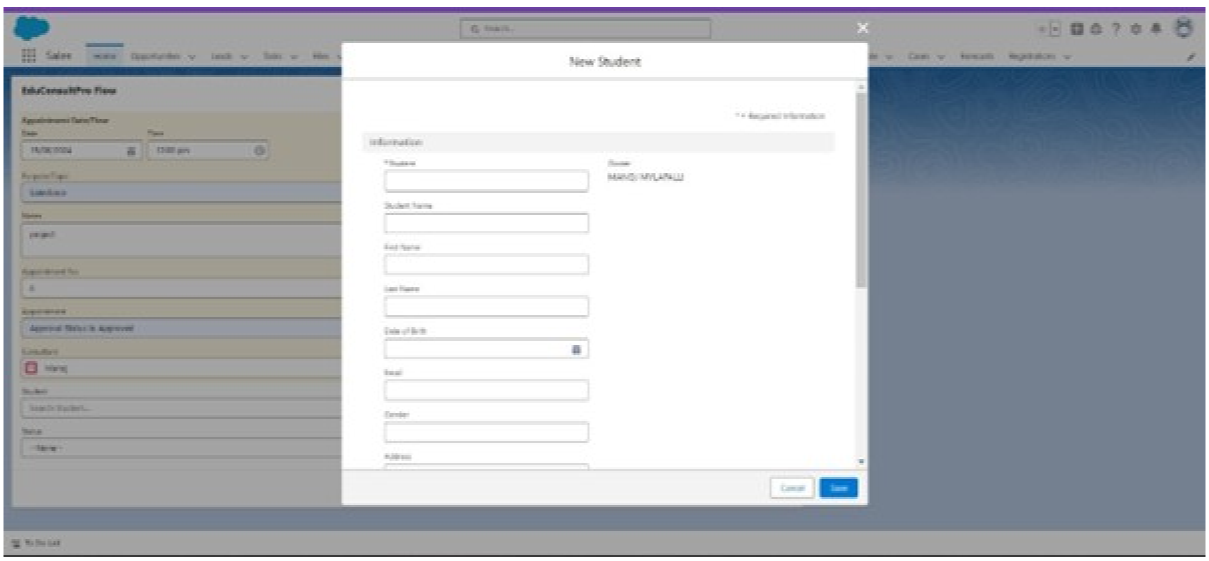


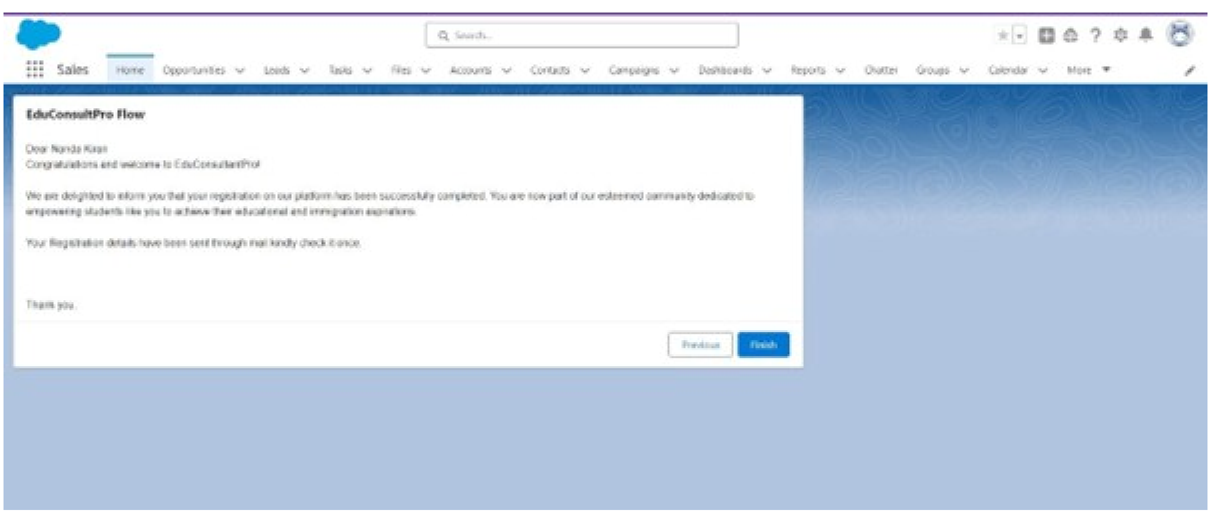
Book an appointment :



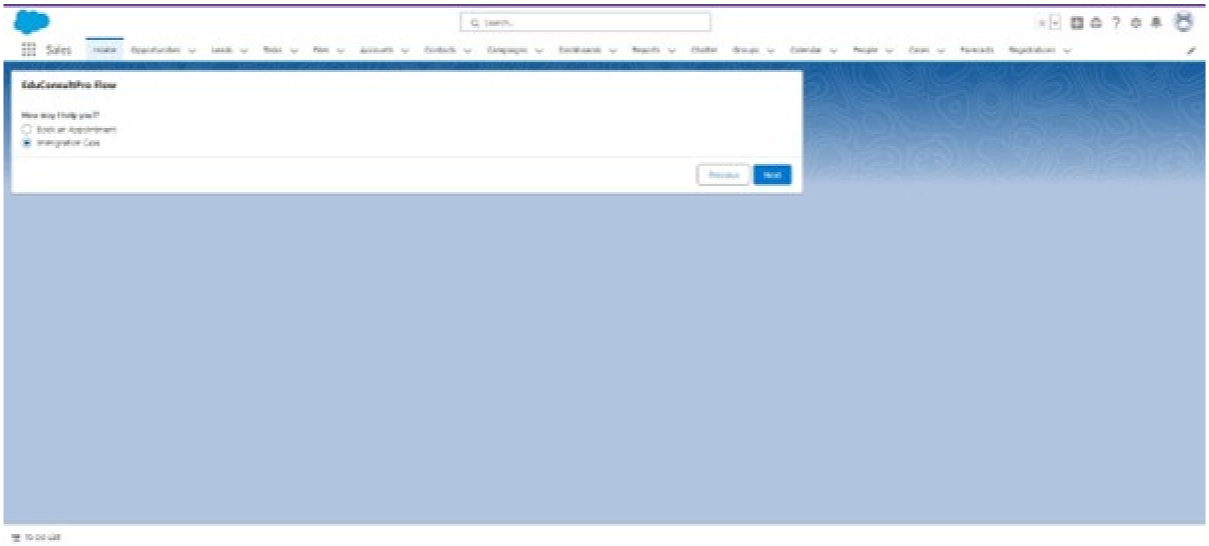
The **EduConsultantPro** Flow includesa form for adding **new consultant** details, enabling


New Consultant
Information
Save

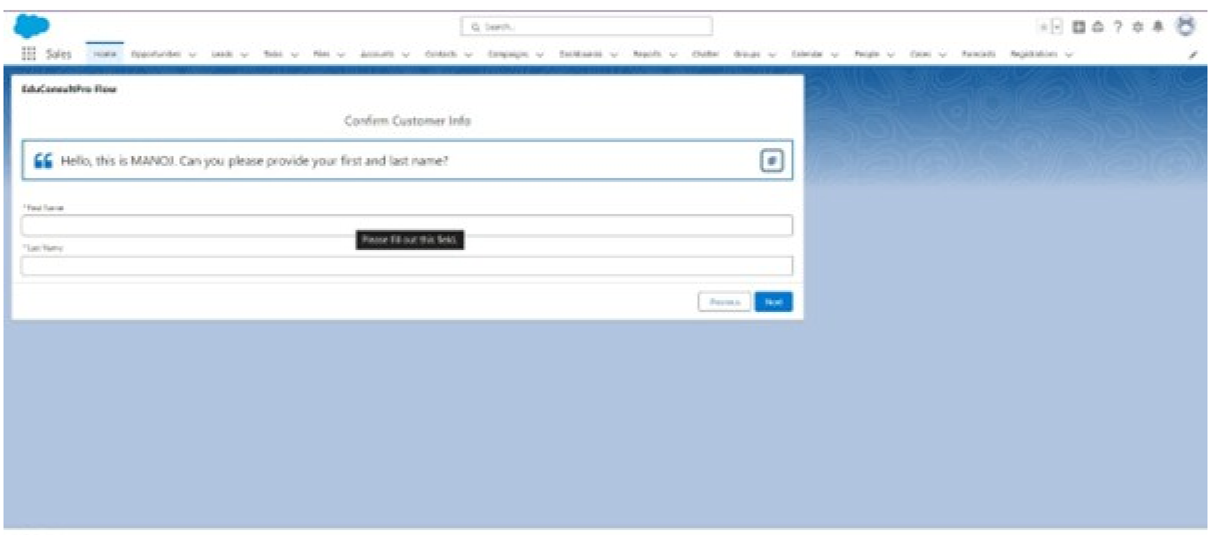

New Student
Save

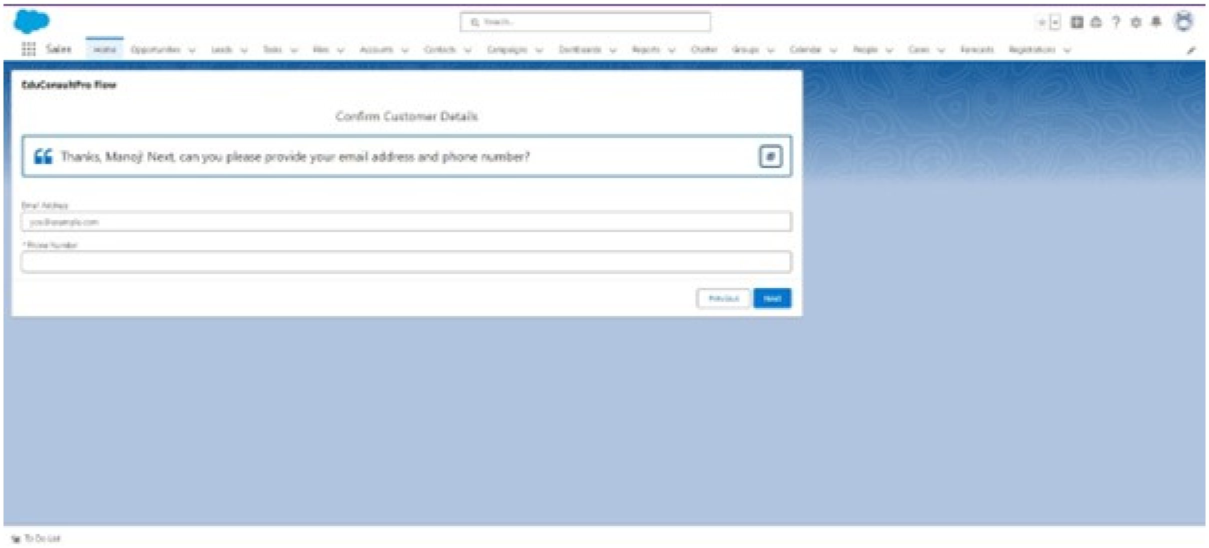

Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
Calendar
More
EduConsultPro Flow
Thank you.
Finish

Immigration case :

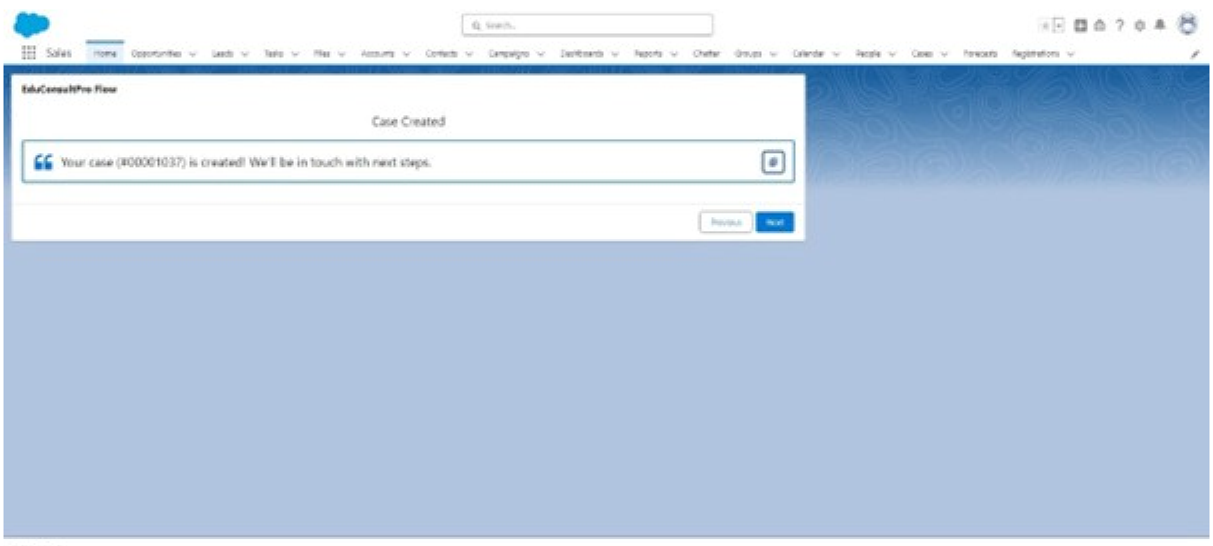


This screen is part of the **EduConsultPro Flow** within Salesforce. It is designedto **confirm customer Information.**

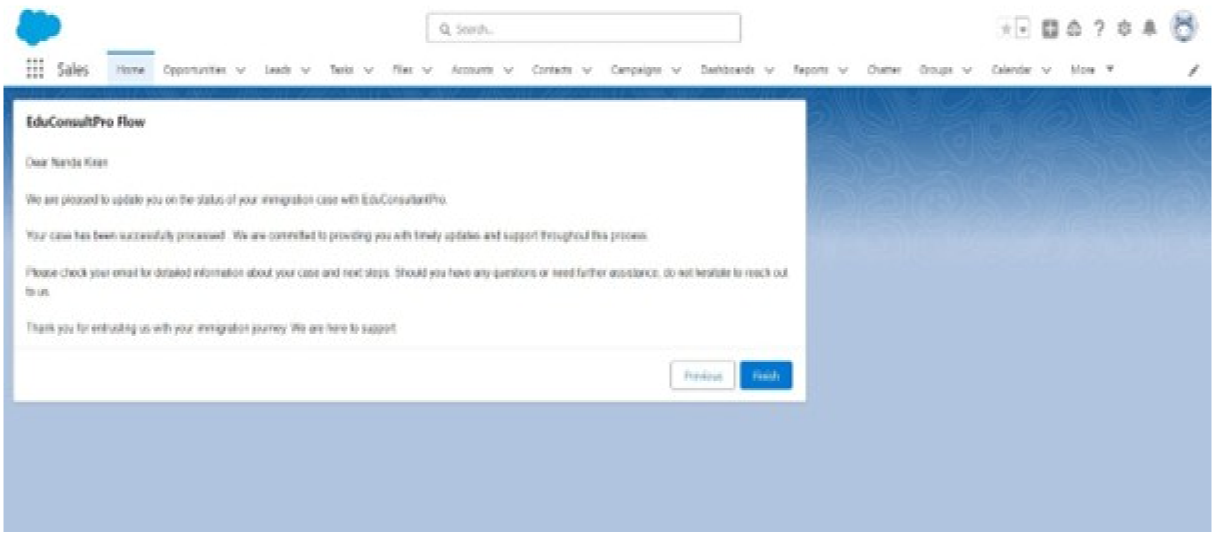




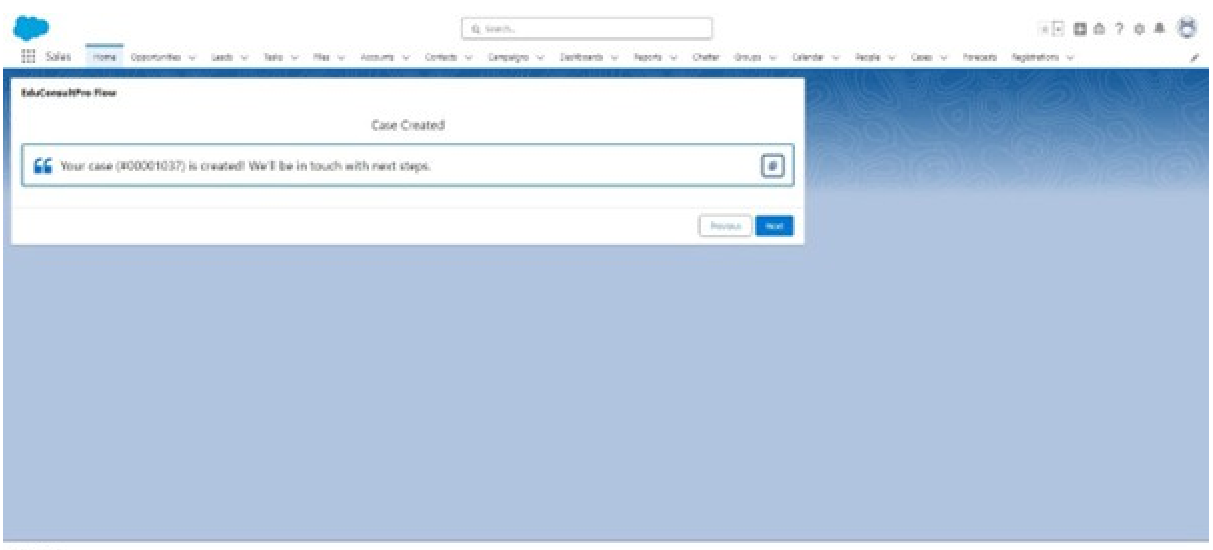
"**EduConsultPro Flow,**" where users are prompted to input case details, including case type, case origin, case subject, and case details, before proceeding to the next step.

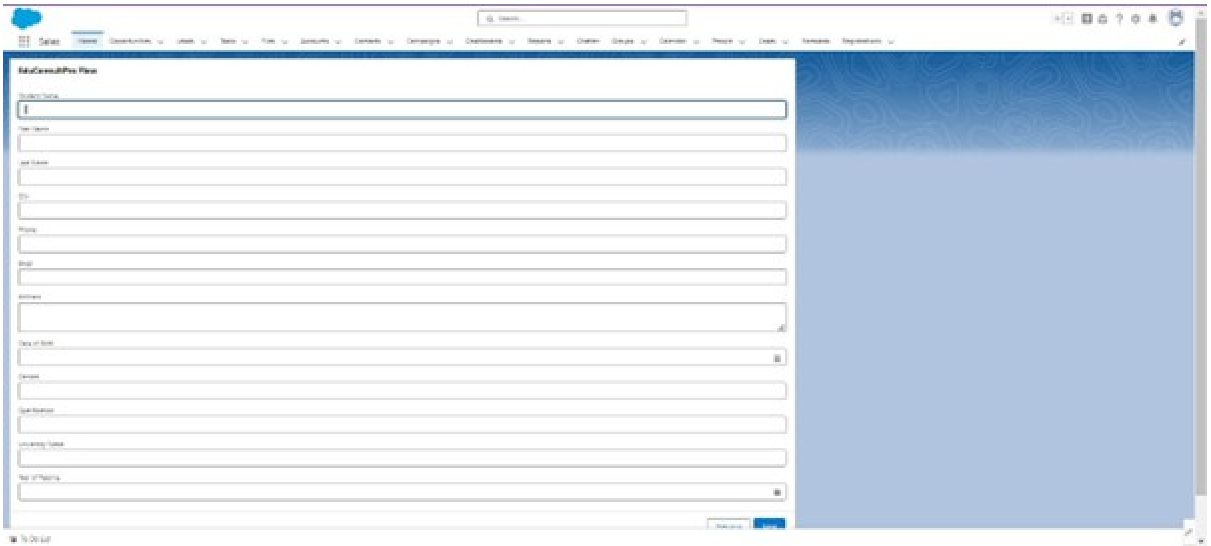


The final step of the "**EduConsultPro Flow**" in Salesforce, where a message informs the student that their immigration case has been successfully processed. The student is advised to check their email for further details and next steps.

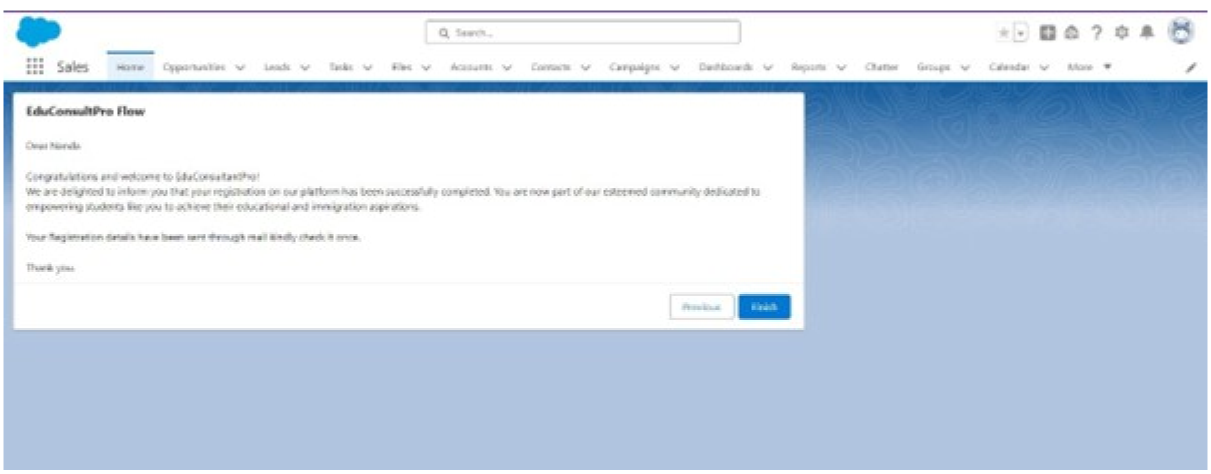


Are u existingstudent NO?

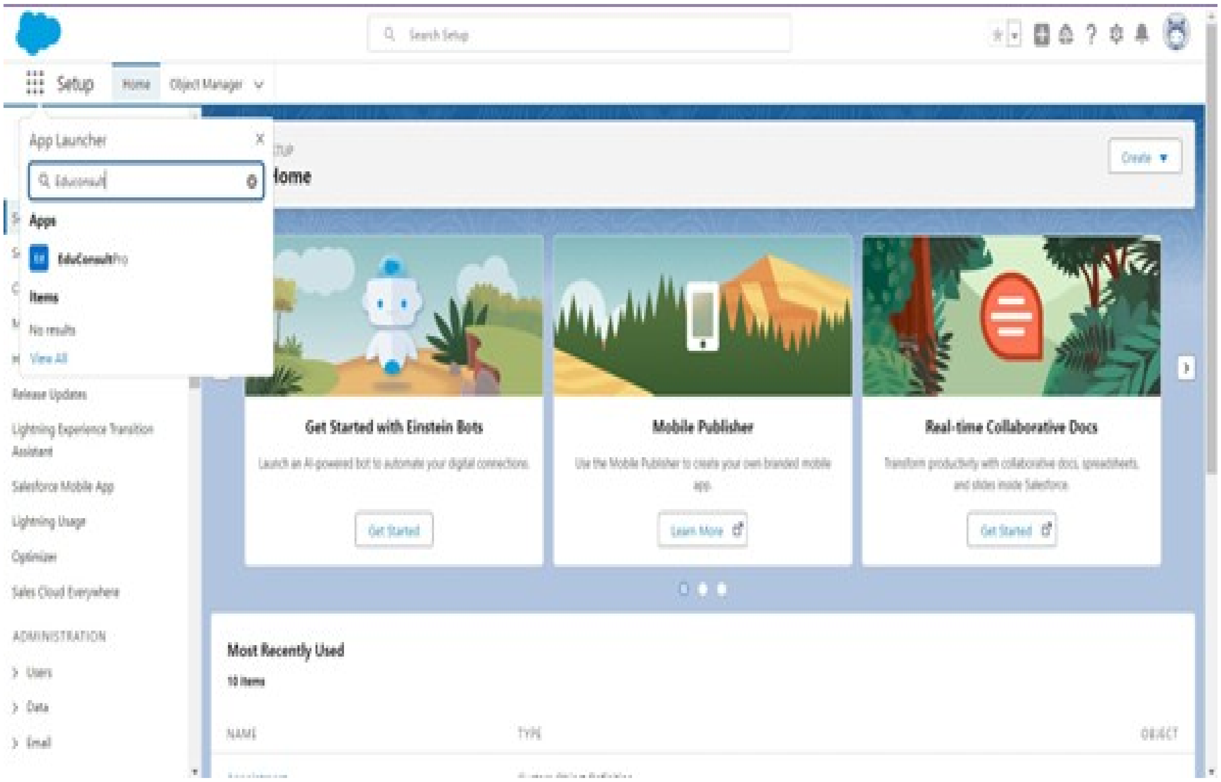


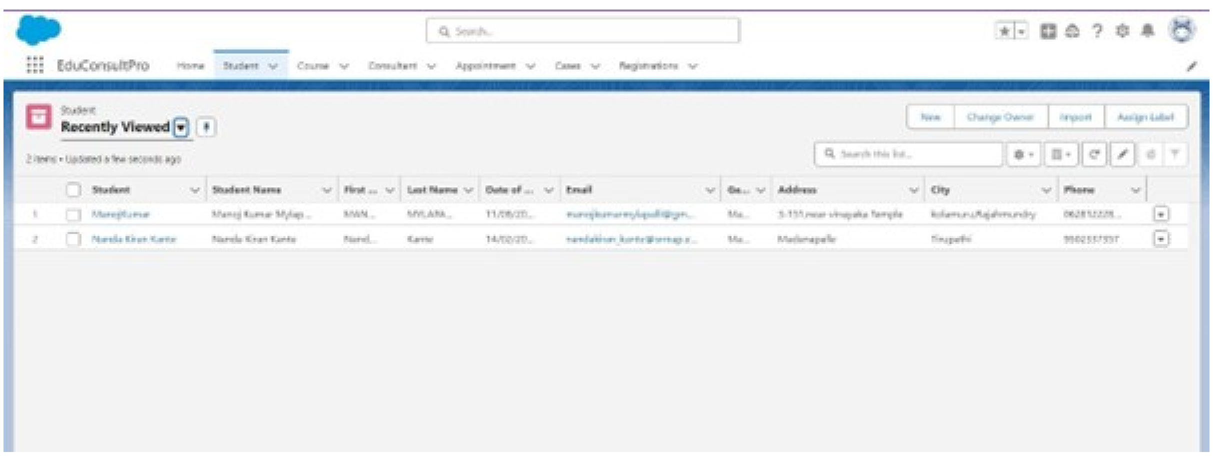


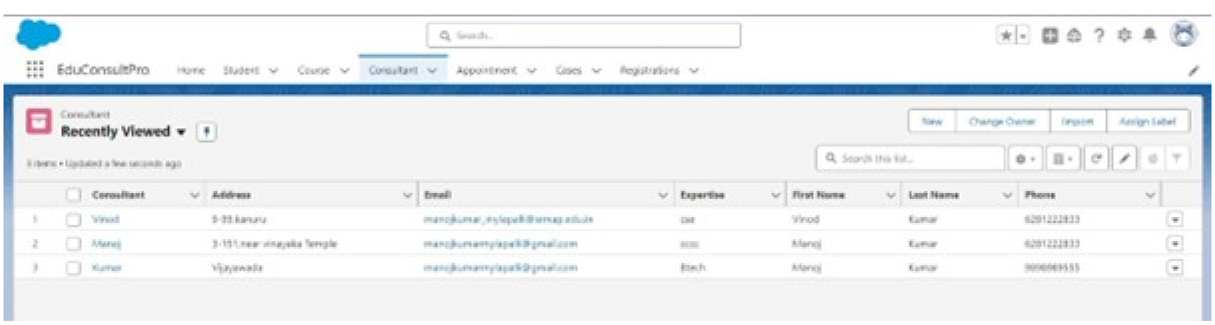
This screen is the finalstep of the **EduConsultPro Flow** in Salesforce. It displays a confirmation message indicating that the registration process is complete.



"Search for **EduConsultPro** in the App Launcher, and you will be directedto the corresponding page."


Setup
Home
Object Manager
App Launcher
Apps
EduConsultPro
Items
No results
View All
Get Started with Einstein Bots
Mobile Publisher
Real-time Collaborative Docs
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
Email
Most Recently Used


EduConsultPro
Student
Recently Viewed


EduConsultPro
Consultant
Recently Viewed

5. Testing and Validation

Testing and validation are crucial in ensuring that the Salesforce implementation for EduConsultPro Institute works as expected, delivering a seamless experience for both students and staff. Below are the detailed testing methods and validations used in this project:

1. Unit Testing

Unit testing was performed to validate the core logic and functionality of the custom Salesforce components, such as **Apex classes, triggers, flows, and validation rules**. The primary goal was to ensure that each individual component behaves correctly in isolation. The following methods were used:

- **Apex Class Testing**:
  - Wrote test classes to ensure that business logic implemented in Apex (for example, record creation, approval processes, and custom validation) behaves as expected.
  - Verified that **Governor Limits** (such as SOQL queries and DML statements) were respected to prevent runtime errors.
  - Checked code coverage to ensure that all business logic was tested, with the goal of achieving at least 75% coverage, as required by Salesforce.
- **Apex Trigger Testing**:
  - Tested all **before** and **after triggers** associated with custom objects like **Student, Appointment, and Course**, ensuring they fired correctly and updated records appropriately.
  - Included scenarios where triggers should handle bulk operations (i.e., when multiple records are created or updated at once) to ensure that the logic is optimized for bulk processing.
- **Flow Testing**:
  - Tested individual **Screen Flows** and **Record-Triggered Flows** to verify that the flow logic functions correctly, especially the decision-making elements and automated record creation for students, courses, and appointments.

- Verified that error messages are displayed correctly when validation rules fail during flow execution.

- **Validation Rules Testing**:
  - Tested custom validation rules to ensure that incorrect or incomplete data entry is prevented, such as validating required fields (e.g., Student Name, Email, and Course Selection) during admission and consulting requests.

2. Integration Testing

Integration testing was conducted to ensure that all individual components of the Salesforce implementation work together seamlessly. This was particularly important because the system relies on interconnected objects, flows, and automation. The following methods were used:

- **Testing Object Relationships**:
  - Ensured that **relationships between objects** (such as Student, Consultant, Course, Appointment, and Case) worked as expected. For example, when a student's appointment was booked, it correctly referenced the consultant and course.
- **Email Template and Notification Testing**:
  - Validated email templates used for **admission confirmations, appointment scheduling, and consulting approvals**.
  - Tested the **automated email notifications** to confirm they were sent at the correct time (e.g., after a student submits an application or books a consulting appointment) and contained accurate information.
- **Approval Process Testing**:
  - Simulated real-world scenarios where consulting requests or immigration cases go through an approval process. Ensured that the **approval workflows** executed properly, including sending approval requests to the appropriate staff member and sending follow-up notifications (approval/rejection) to students.

3. User Interface (UI) Testing

User interface testing focused on ensuring the system was user-friendly for both students and staff. UI testing included the following activities:

- **Screen Flow UI Testing**:
  - Tested all **Screen Flows** to ensure that students could navigate easily through admission and course selection processes without encountering any confusing steps or broken screens.
  - Verified that all input fields (e.g., Student Name, Email, Course Selection) displayed correctly and accepted data input as expected.
- **Lightning App Interface Testing**:
  - Tested the **custom Lightning App** to ensure that staff had a streamlined interface for managing student records, consulting requests, and appointments. This included testing access to different objects (e.g., Students, Courses, Appointments) from a single dashboard.
- **Mobile Compatibility Testing**:
  - Verified that the Salesforce app was responsive and easy to use on mobile devices for both students (filling forms, booking appointments) and staff (managing applications, appointments, and approvals).

4. Functional Testing

Functional testing was done to ensure the platform met the business requirements of EduConsultPro Institute. This involved testing key features and functionality:

- **Admission Application Management**:
  - Tested the complete workflow for managing student admission applications, from the initial form submission to the processing and approval by admissions staff.
- **Consulting Service Requests**:
  - Tested the consulting request process, where students submit consulting requests, and consultants accept and manage these requests within Salesforce.

- **Immigration Case Management**:
  - Verified that immigration cases could be created, tracked, and managed within Salesforce, with automated notifications and status updates sent to students and immigration agents.

5. Regression Testing

Regression testing was performed after changes or updates were made to the system (such as flow modifications, new validation rules, or additional approval processes) to ensure that existing functionality was not affected. The following activities were conducted:

- **Re-testing Existing Flows**:
  - Ensured that previously working flows (e.g., the student admission process, consulting service requests, and case management) continued to function as expected after any system updates.
- **Automated Test Scripts**:
  - Used automated testing tools such as **Salesforce Test Framework** or external automation tools (e.g., **Selenium**) to run repeated tests on common use cases, ensuring that no new bugs were introduced.

6. Performance Testing

Performance testing was conducted to ensure the system's responsiveness and speed, particularly when handling a large number of student records, consultant requests, and cases:

- **Load Testing**:
  - Simulated a high volume of student admissions and consulting requests to test how the system performed under stress. Ensured that the system did not slow down or time out during peak usage periods (such as the start of a new academic session).
- **Response Time Validation**:
  - Measured the **response time** for key operations, such as submitting

admission applications, approving consulting requests, and updating case statuses, ensuring they were completed within acceptable time limits.

7. User Acceptance Testing (UAT)

User acceptance testing was carried out by key stakeholders (admissions staff, consultants, and system administrators) to ensure the system met their expectations and business needs:

- **Scenario-based Testing**:
  - Created real-world scenarios that admissions staff and consultants might encounter, such as processing a student's admission, approving a consulting request, or resolving an immigration case, to verify that the system handled them correctly.
- **Feedback and Iteration**:
  - Collected feedback from users and made necessary adjustments to improve the system's usability and performance before final deployment.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

- **Admission Process**: Automation of admission form submissions, student data collection, and email confirmations.
- **Consulting Services**: Streamlined handling of student consulting requests and automated scheduling of appointments.
- **Immigration Case Management**: Captured, tracked, and processed immigration cases with real-time updates.

7. Conclusion

The **Salesforce EduConsultPro** project successfully implemented a CRM solution that automates admission applications, student inquiries, and consulting services for EduConsultPro Institute. By streamlining workflows and improving communication between students and staff, the platform enhances both operational efficiency and the overall student experience.