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

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### **Hardware Required:**

System with advance configuration

### **Software Required:**

Salesforce Platform

### **System Required:**

Good Configuration

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.

Submitted by

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## 1) Create Objects from Spreadsheet

**Create Course object:** upload the file, map the fields and upload to create an object

[Course](#).

**1. the following sheets for remaining objects.**

- a. [Consultant](#)
- b. [Student](#)
- c. [Appointment](#)

**Steps:**

**Click on name and download for csv file and save go to the object manager and right side box and create**

## spreadsheet to upload the file for csv

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with links for YouTube, Maps, News, Translate, Dashboard, and Gmail. Below the navigation bar is a search bar labeled "Search Setup". The main area is titled "Object Manager" and displays a table of custom objects. The columns in the table are: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. A "Custom Object from Spreadsheet" button is visible in the header of the table. The table contains the following data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Course - Course	Course_Course__c	Custom Object		13/11/2024
Registration	Registration__c	Custom Object		13/11/2024
Student - Student	Student_Student__c	Custom Object		09/11/2024
Students	Students__c	Custom Object		09/11/2024
Student - Student0	Student_Student_0__c	Custom Object		09/11/2024
Student	Student__c	Custom Object		09/11/2024
Student2- Student2	Student_2_Student_2__c	Custom Object		09/11/2024

## Create Relationship among the objects:

The screenshot shows the Salesforce Schema Builder interface. At the top, there's a navigation bar with links for YouTube, Maps, News, Translate, Dashboard, and Gmail. Below the navigation bar is a search bar labeled "Search Setup". The main area is titled "Schema Builder" and displays a diagram of object relationships. On the left, there's a sidebar with "Elements" and "Objects" tabs, a "Select objects to display on the builder" dropdown set to "All Objects", and a "Quick Find..." input field. The diagram shows several objects represented as cards: "Registration", "Course - Course", "Appointment - Appointment", and "Consultant - Consultant". Relationships are shown as lines connecting the objects. A legend on the right explains the line colors: blue for Lookup Relationship, red for Master-Detail Relationship, and orange for Required Field. The bottom of the screen shows a standard Windows taskbar with icons for File, Search, Task View, Start, File Explorer, Edge, and Google Chrome.

# Configure the Case Object:

1. Go to object manager, edit case object.
2. Select the “Type” field and add the values in it.

Immigration

Visa Application

The screenshot shows the Salesforce Object Manager interface for the Case object. The left sidebar lists various setup options like Details, Fields & Relationships, Case Page Layouts, etc. The main area displays the 'Fields & Relationships' section for the Case object. A search bar at the top right shows 'type'. Below it is a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. One row is visible: Type (Field Label), Type (Field Name), Picklist (Data Type), and null (Controlling Field). The table has a scroll bar on the right side.

3. “Status” field and add the values in it.

Open

In-progress

Screenshot of the Salesforce Setup interface showing the Case object's Fields & Relationships section.

The left sidebar shows the following navigation:

- Details
- Fields & Relationships** (selected)
- Case Page Layouts
- Case Close Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types

The main content area displays the "Validation Rules" and "Case Type Picklist Values" sections.

**Validation Rules**: No validation rules defined.

**Case Type Picklist Values**:

Action	Values	API Name	Default	Chart Colors	Modified By
Edit   Del   Deactivate	Mechanical	Mechanical	<input type="checkbox"/>	Assigned dynamically	vigneshwaran_R 07/11/2024, 9:47 am
Edit   Del   Deactivate	Electrical	Electrical	<input type="checkbox"/>	Assigned dynamically	vigneshwaran_R 07/11/2024, 9:47 am
Edit   Del   Deactivate	Electronic	Electronic	<input type="checkbox"/>	Assigned dynamically	vigneshwaran_R 07/11/2024, 9:47 am
Edit   Del   Deactivate	Structural	Structural	<input type="checkbox"/>	Assigned dynamically	vigneshwaran_R 07/11/2024, 9:47 am
Edit   Del   Deactivate	Other	Other	<input type="checkbox"/>	Assigned dynamically	vigneshwaran_R 07/11/2024, 9:47 am
Edit   Del   Deactivate	Immigration	Immigration	<input type="checkbox"/>	Assigned dynamically	vigneshwaran_R 13/11/2024, 3:50 pm
Edit   Del   Deactivate	Visa Application	Visa Application	<input type="checkbox"/>	Assigned dynamically	vigneshwaran_R 13/11/2024, 3:50 pm

**Inactive Values**: No Inactive Values values defined.

Screenshot of the Salesforce Setup interface showing the Case object's Fields & Relationships section.

The left sidebar shows the following navigation:

- Details
- Fields & Relationships** (selected)
- Case Page Layouts
- Case Close Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types

The main content area displays the "Validation Rules" and "Case Status Picklist Values" sections.

**Validation Rules**: No validation rules defined.

**Case Status Picklist Values**:

Action	Values	API Name	Closed	Default	Chart Colors	Modified By
Edit   Deactivate	New	New	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assigned dynamically	vigneshwaran_R 07/11/2024, 9:47 am
Edit   Del   Deactivate	Working	Working	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	vigneshwaran_R 07/11/2024, 9:47 am
Edit   Del   Deactivate	Escalated	Escalated	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	vigneshwaran_R 07/11/2024, 9:47 am
Edit   Del   Deactivate	Closed	Closed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	vigneshwaran_R 07/11/2024, 9:47 am
Edit   Del   Deactivate	Open	Open	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	vigneshwaran_R 13/11/2024, 3:52 pm
Edit   Del   Deactivate	In-progress	In-progress	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	vigneshwaran_R 13/11/2024, 3:53 pm

**Inactive Values**: No Inactive Values values defined.

# Create a Lightning App:

1. search for the App Manager in quick find
2. New Lightning App create and save EduConsultPro

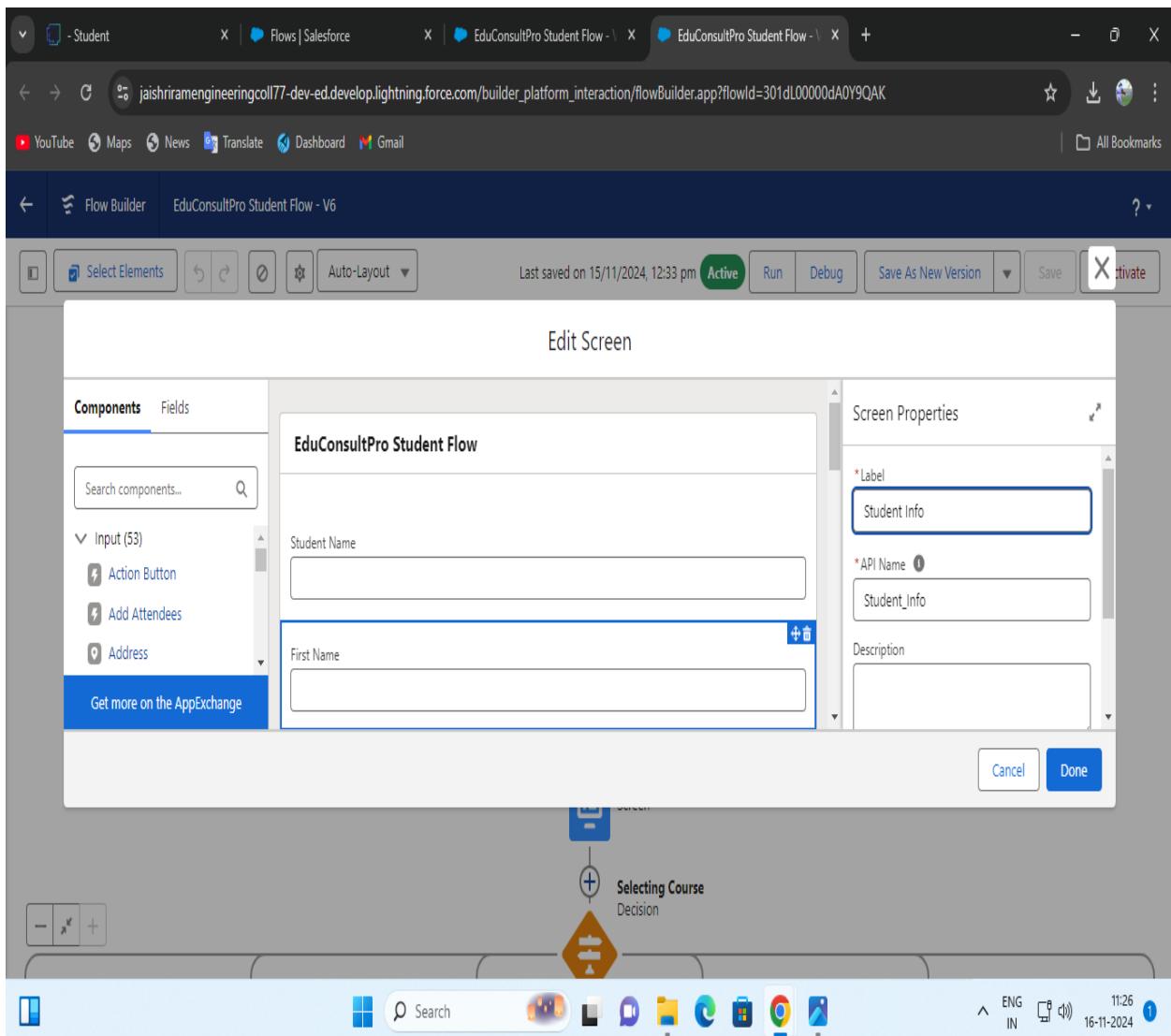
The screenshot shows the Salesforce App Manager interface. The left sidebar has a search bar with "app manager" typed in. Under "Apps", "App Manager" is selected, showing a list of installed apps. The main area displays a table titled "Lightning Experience App Manager" with 24 items. The columns are "App Name", "Developer Name", "Description", "Last Modified", "App Type", and "Actions". The table includes rows for "EduConsultPro", "Business Rules Engine", "Automation", "Salesforce Scheduler Setup", "Queue Management", "All Tabs", "Subscription Management", "Data Manager", "Digital Experiences", and "Platform".

The screenshot shows the Lightning App Builder interface for the "EduConsultPro" app. The left sidebar has sections for "App Options", "Utility Items (Desktop Only)", "Navigation Items", and "User Profiles". The main area is titled "App Details & Branding". It contains fields for "App Name" (EduConsultPro), "Developer Name" (EduConsultPro), "Image" (a placeholder box with an "Upload" button), "Primary Color Hex Value" (#0070D2), and "Description" (Enter a description...). There is also an "Org Theme Options" checkbox. Below this is the "App Launcher Preview" section, which shows a blue square icon with "Ed" and the text "EduConsultPro".

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

### 1) Add Screen Element.

### 2) Create Student Record using Create Element



Screenshot of the Salesforce Flow Builder interface showing a student flow.

**Flow Details:**

- Start:** Screen Flow Start
- Sequence:**
  - Student Info Screen
  - Create Student Record (Create Records)
  - Course Screen Screen
  - Selecting Course Decision
- Decision Logic:** The decision is based on the outcome of the previous step. If "One" is selected, it proceeds to the next step; if "Multiple" is selected, it loops back to the "Selecting Course" step.

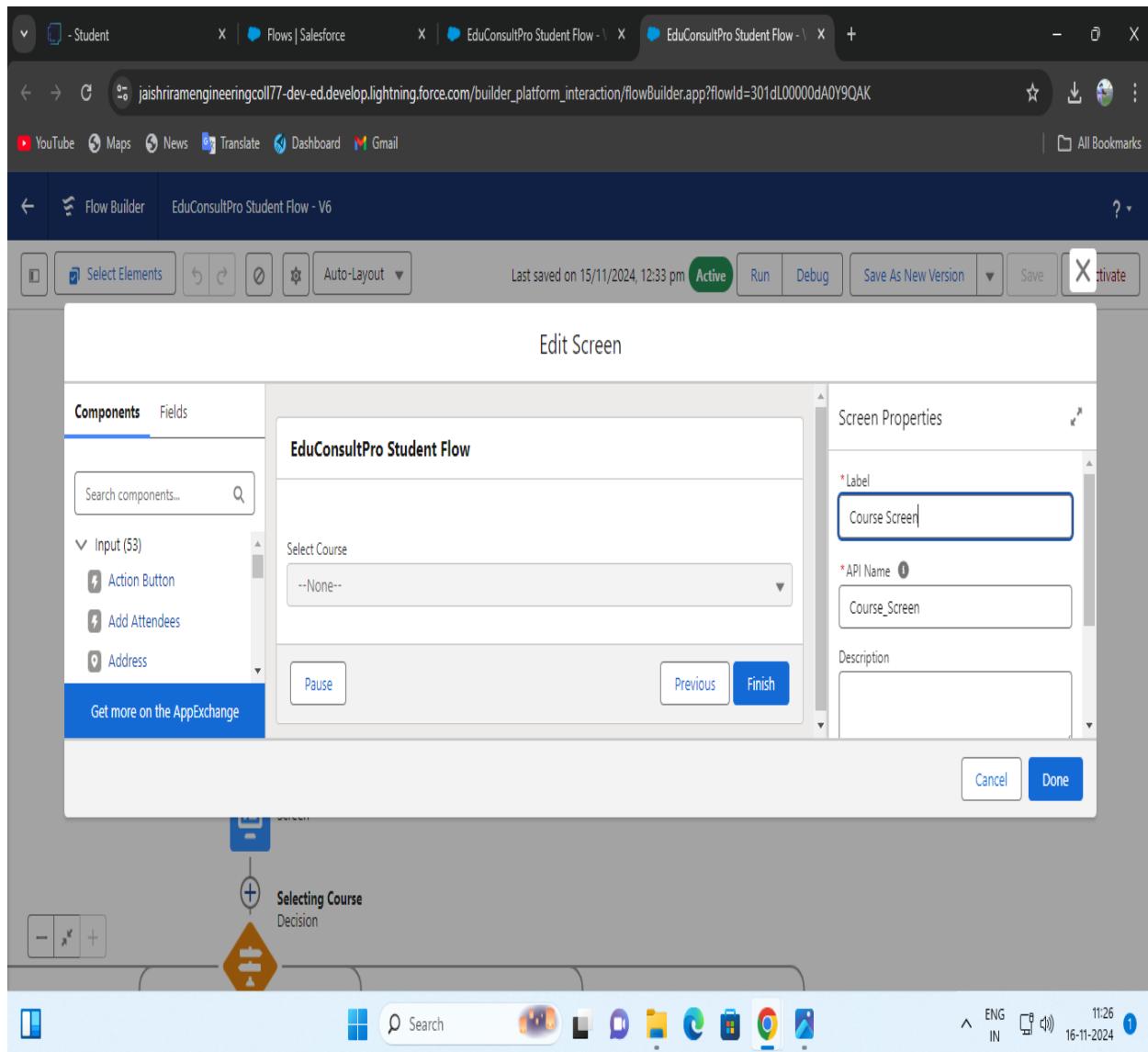
**Create Student Record Step Configuration:**

- Label:** Create Student Record
- API Name:** Create\_Student\_Record
- Description:** (Empty)
- How to set record field values:** From a Record Variable
- How Many Records to Create:**
  - One
  - Multiple
- Create a Record from These Values:**
  - Record:** StudentRecordRes3

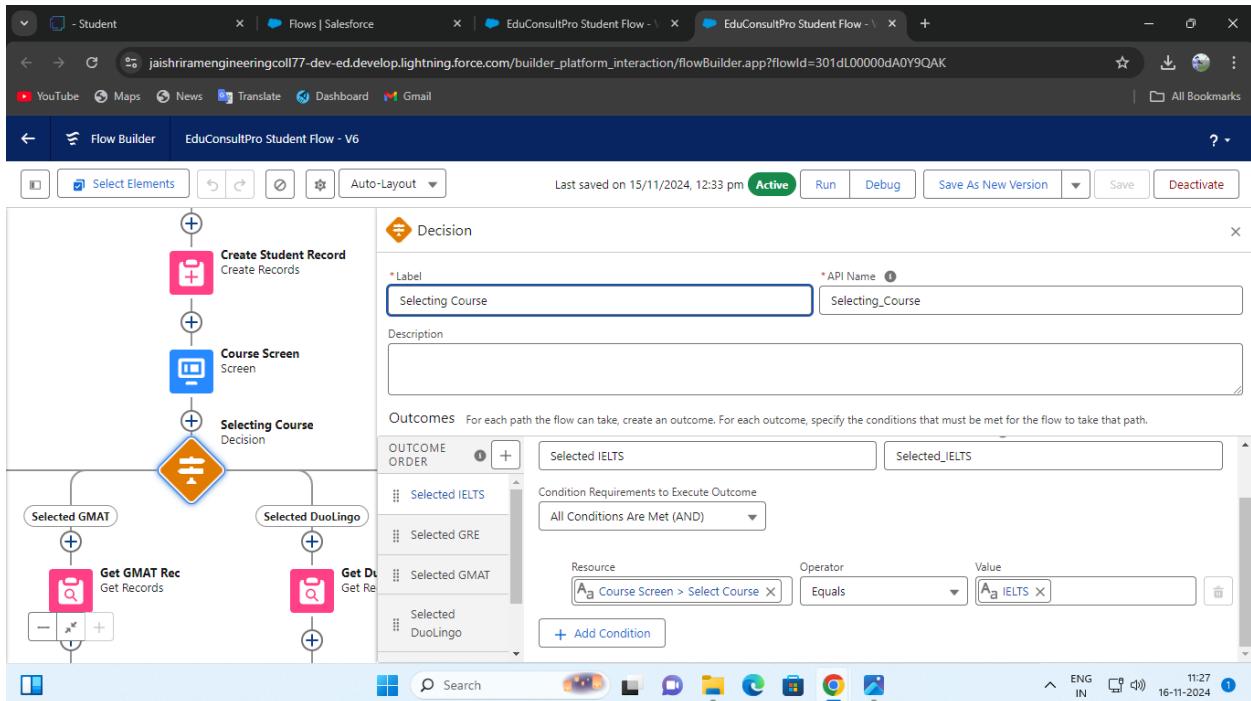
**System Status:**

- Last saved on 15/11/2024, 12:33 pm
- Status: Active
- Buttons: Run, Debug, Save As New Version, Save, Deactivate

### 3) Add Screen Element



## 4) Add Decision Element



a. Add a Decision Element after Select Course Screen Element

b. Selected IELTS

c. Resource : Select\_Course (Screen Component from Select Course Screen Element)

Operator : Equals

Value : IELTS (Choice Variable from Select Course Screen Element)

Repeat step 2 for other options mentioned as below:

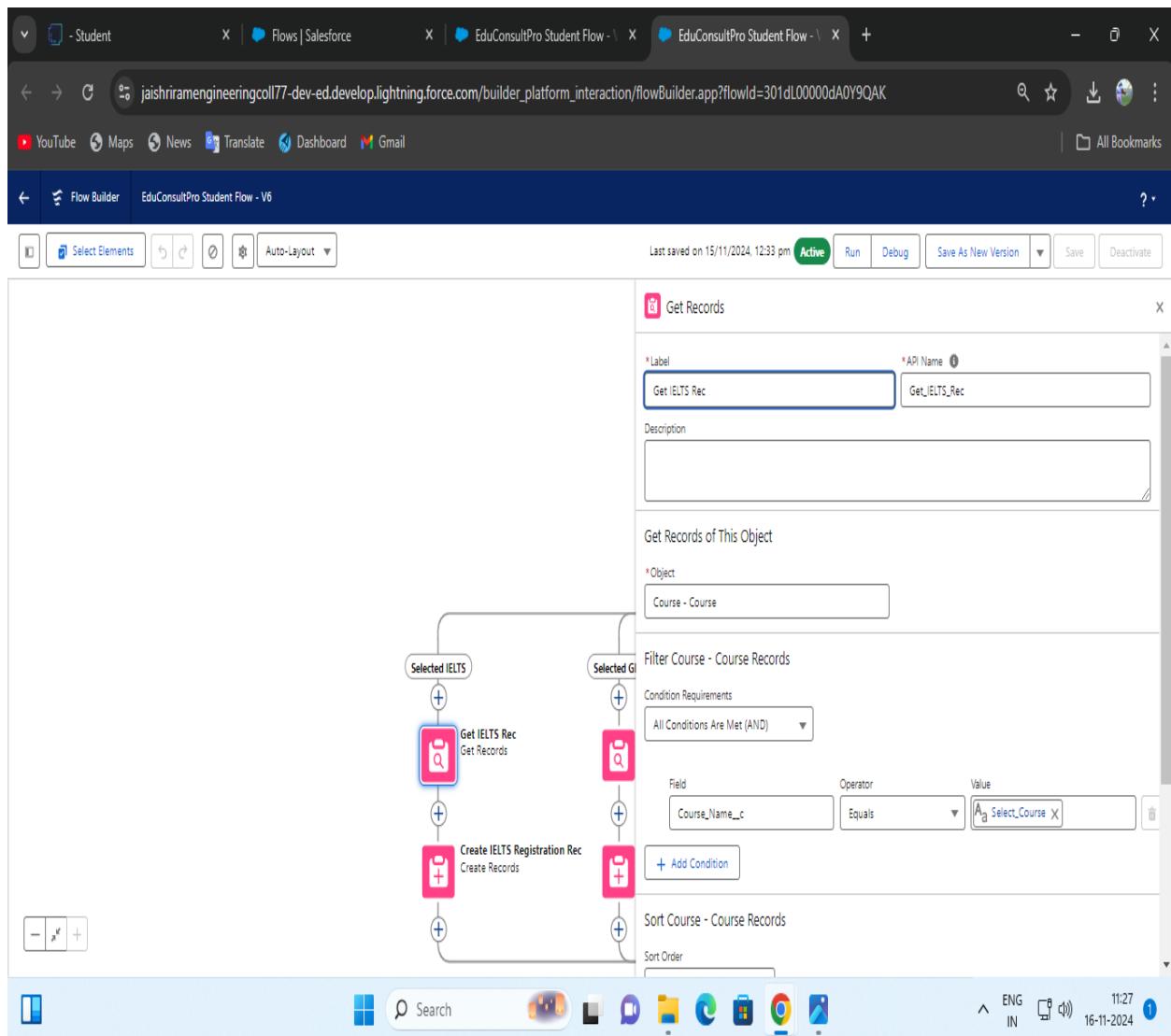
GRE

GMAT

**DULONGO** and TOEFL

## 5)Add GET Record Element

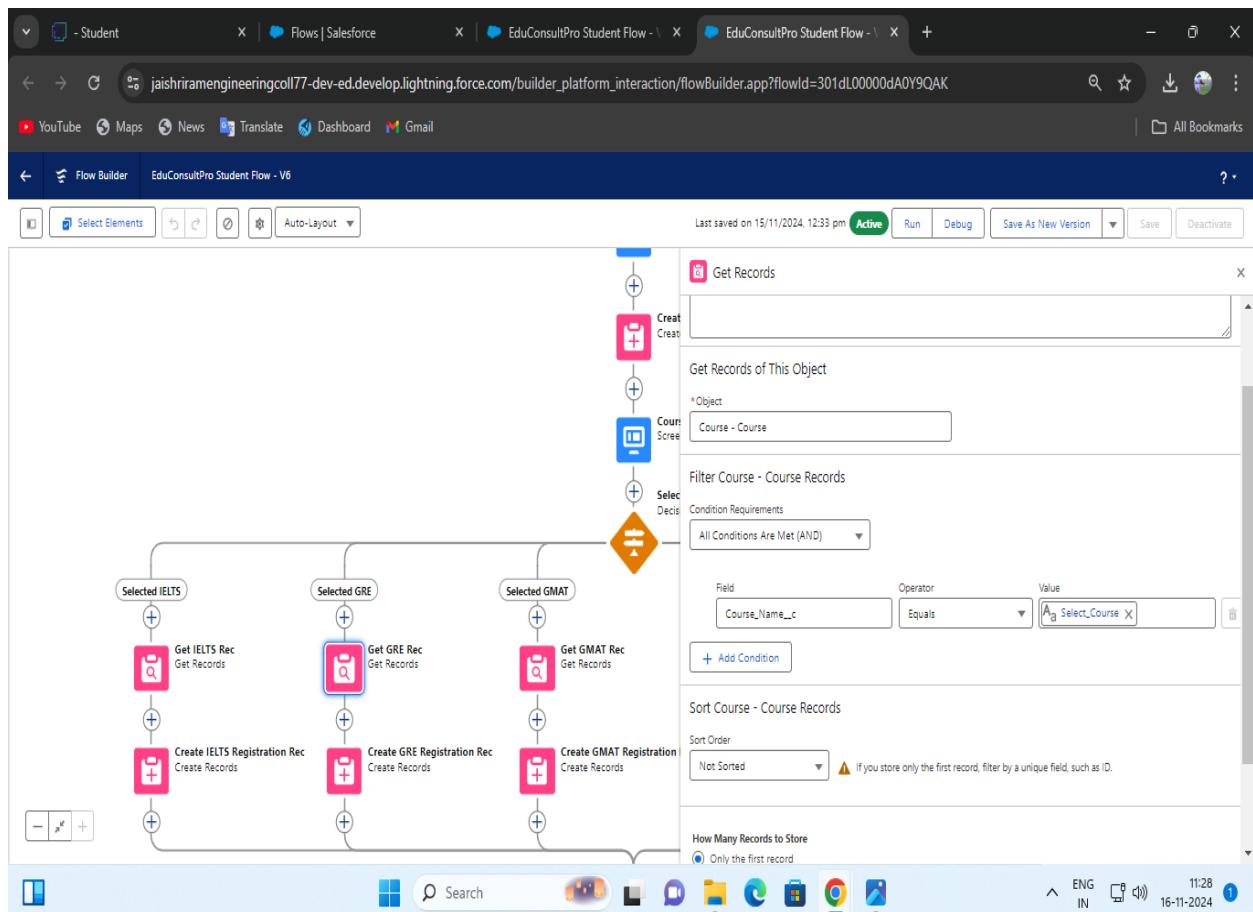
1. Add a GET Record Element after Decision Element, under the IELTS path and label it as “Get IELTS Rec”.
2. Select Object : Course  
Condition Requirement : All Conditions are Met(AND)
3. Field : Course Name  
Operator : Equals  
Value : {!Select\_Course and done.}

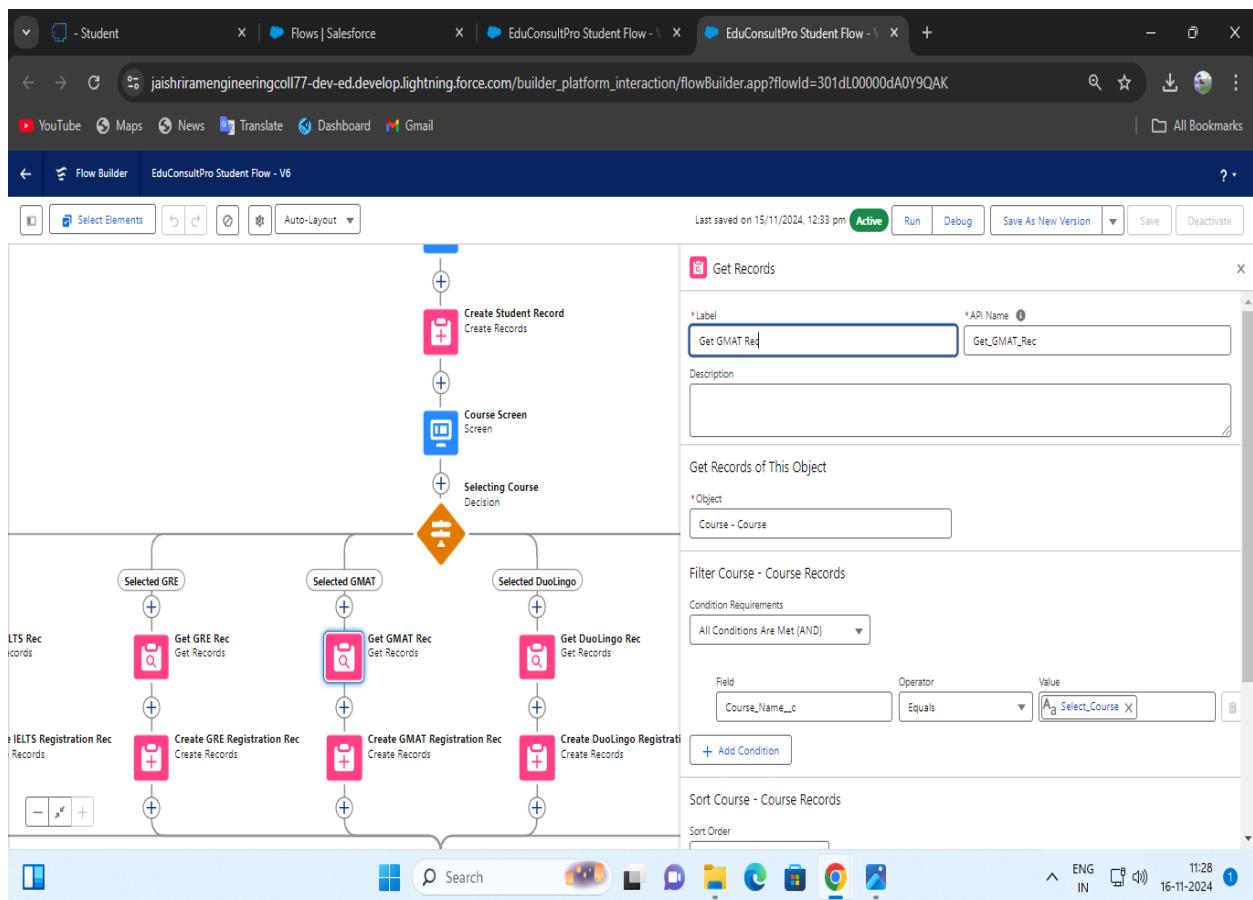


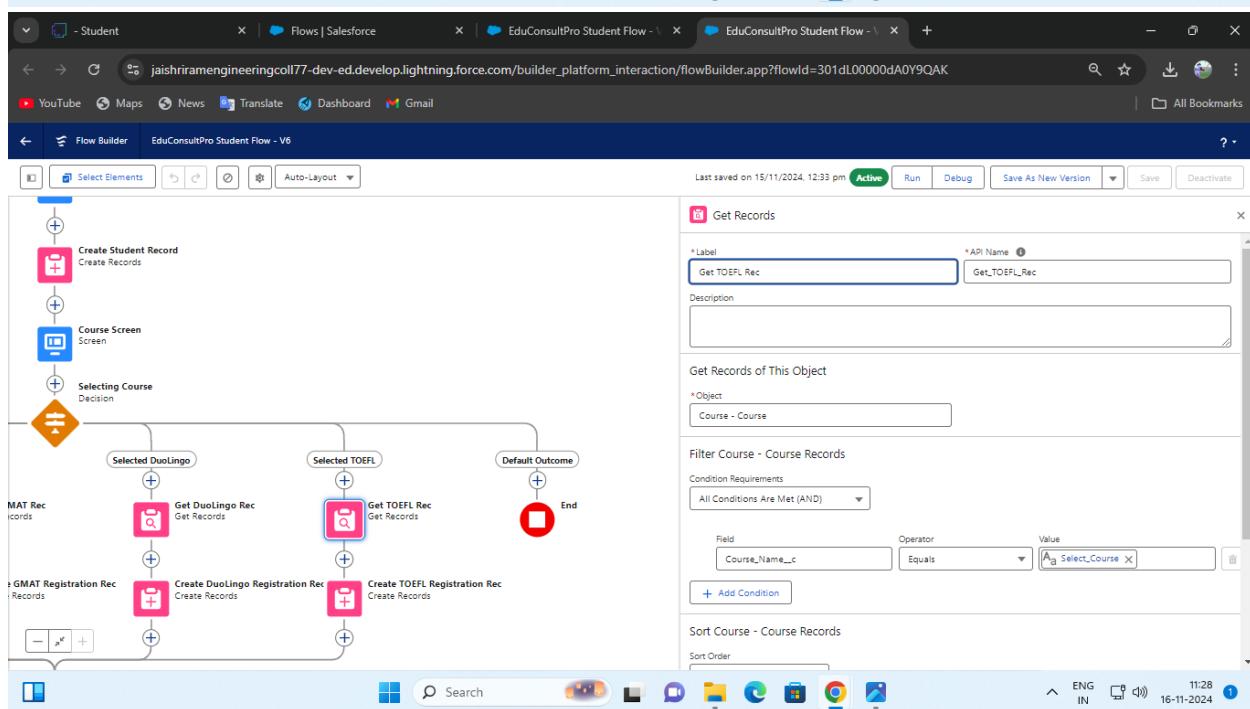
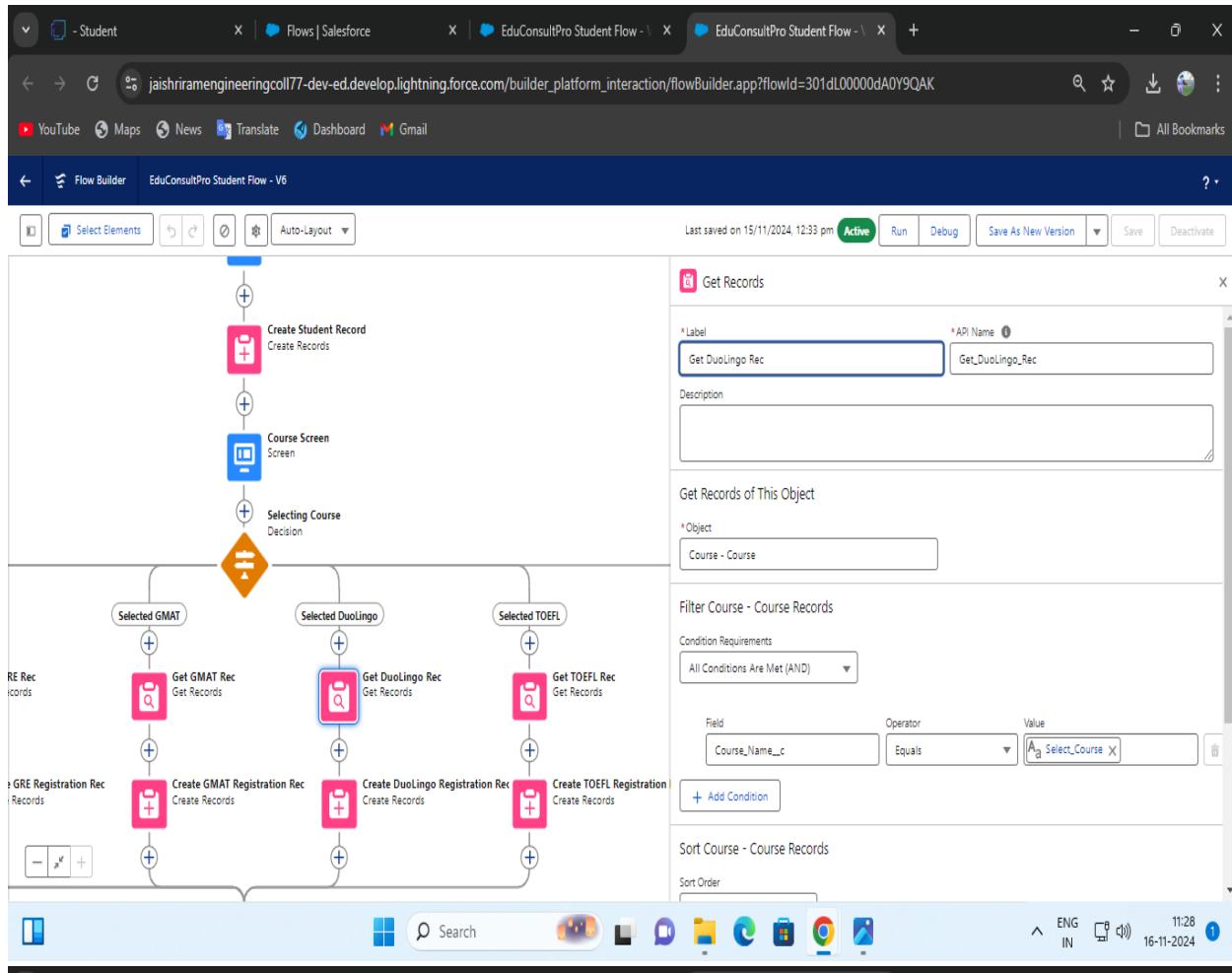
## 6) Create Registration Record using Create Records Element

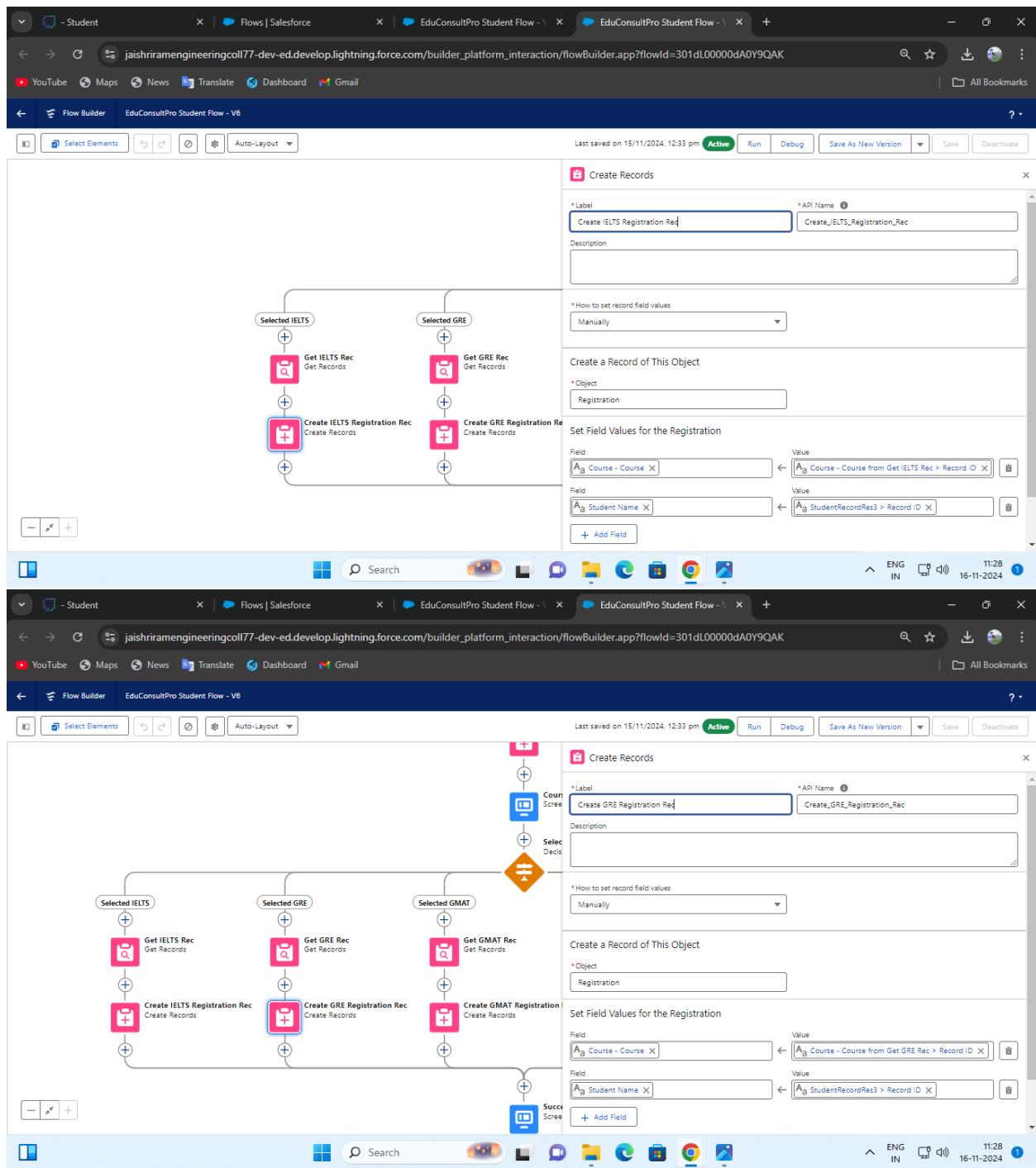
1. Add a Create element after the Get IELTS Rec element and label it as “Create IELTS Registration Rec”.
2. Select “one” under How many records to Create, and select “Use separate resources, and literal values” under How to Set the record fields.
3. Select Object : Registration Field : Course\_Name\_\_c Value : {!GetIELTSRec.Id}

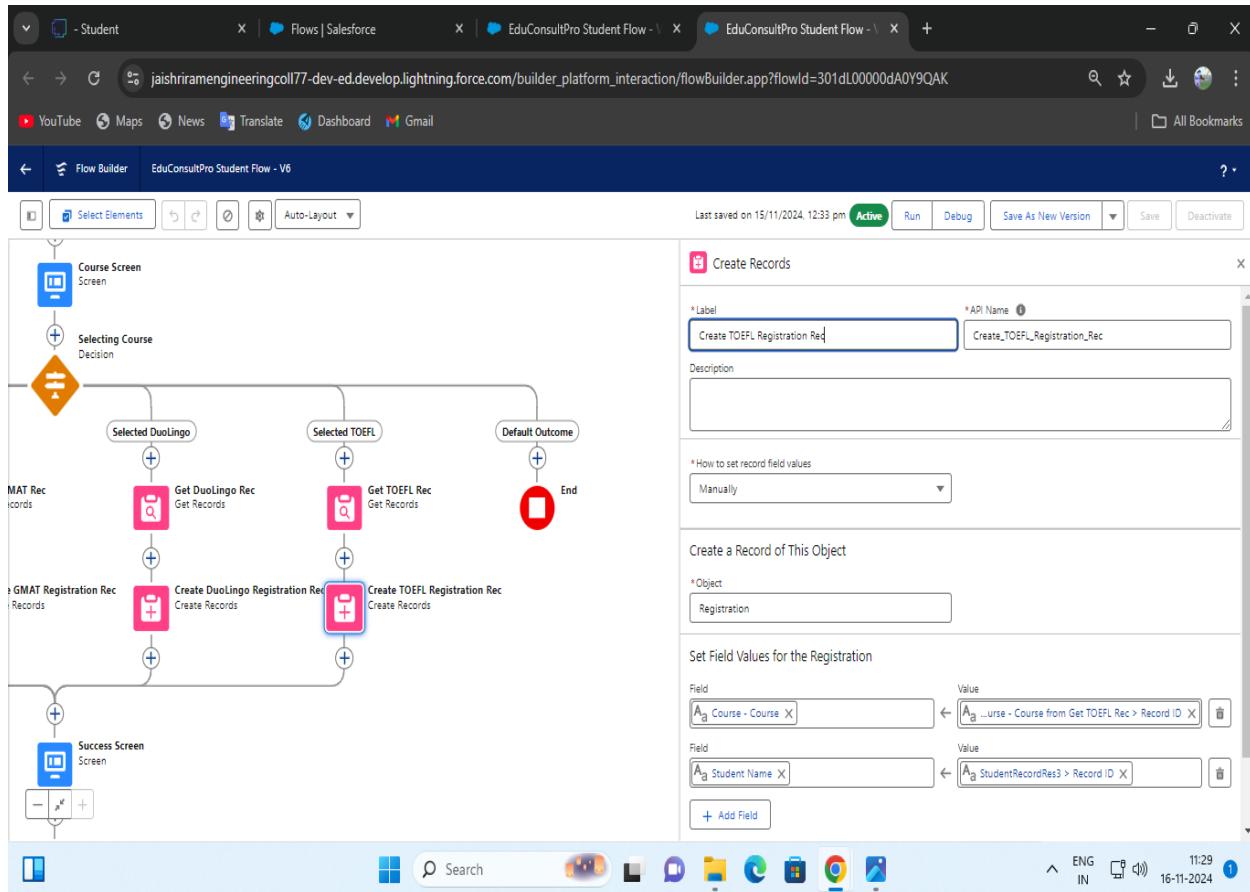
Field : Student\_Name\_\_c Value : {!StudentRecordRes.Id}





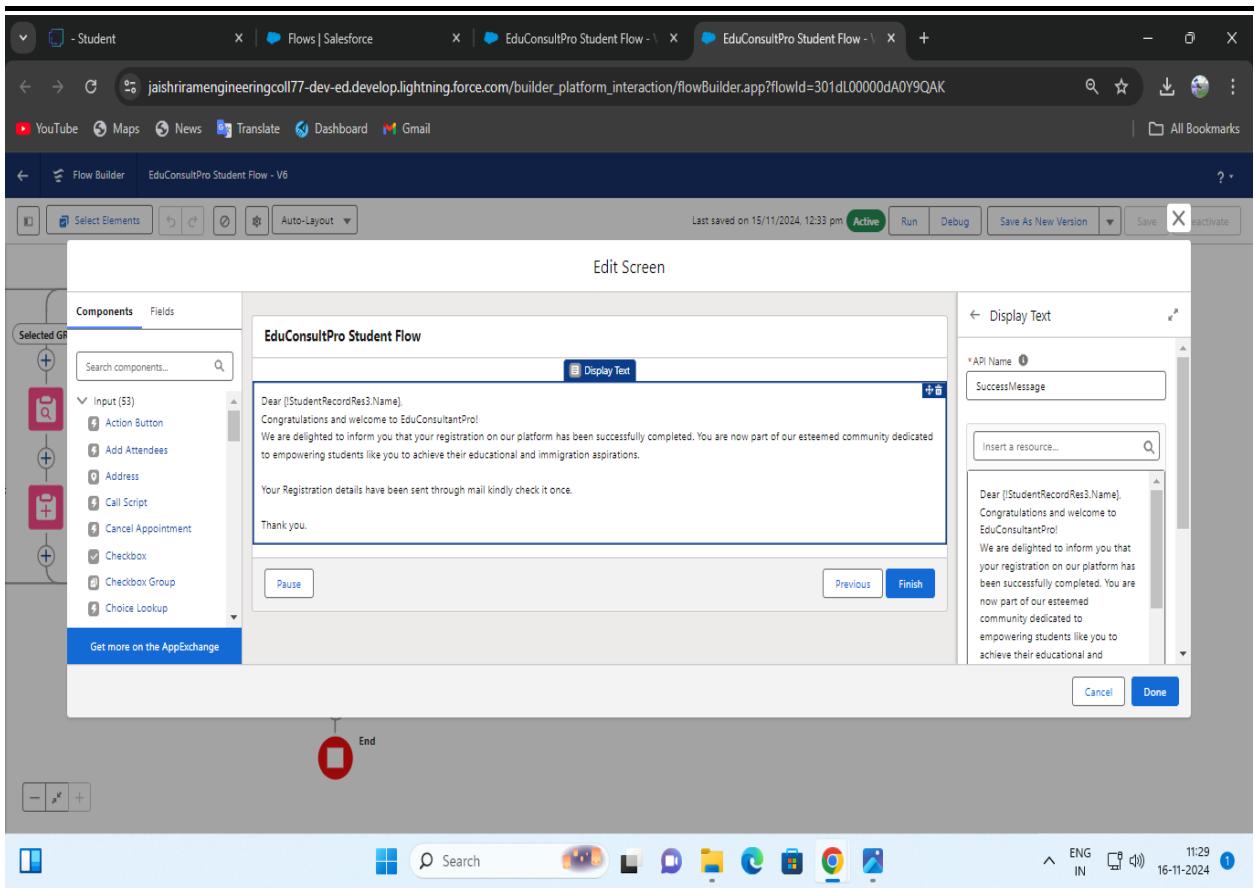
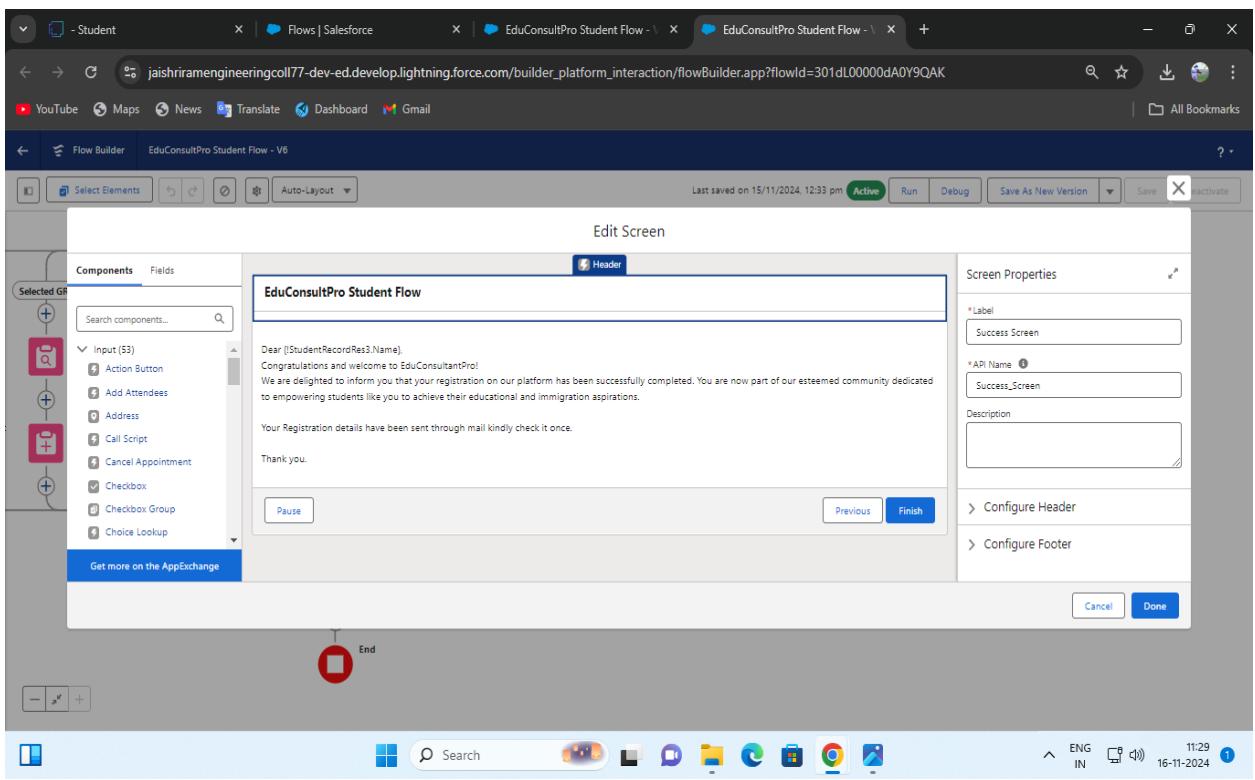




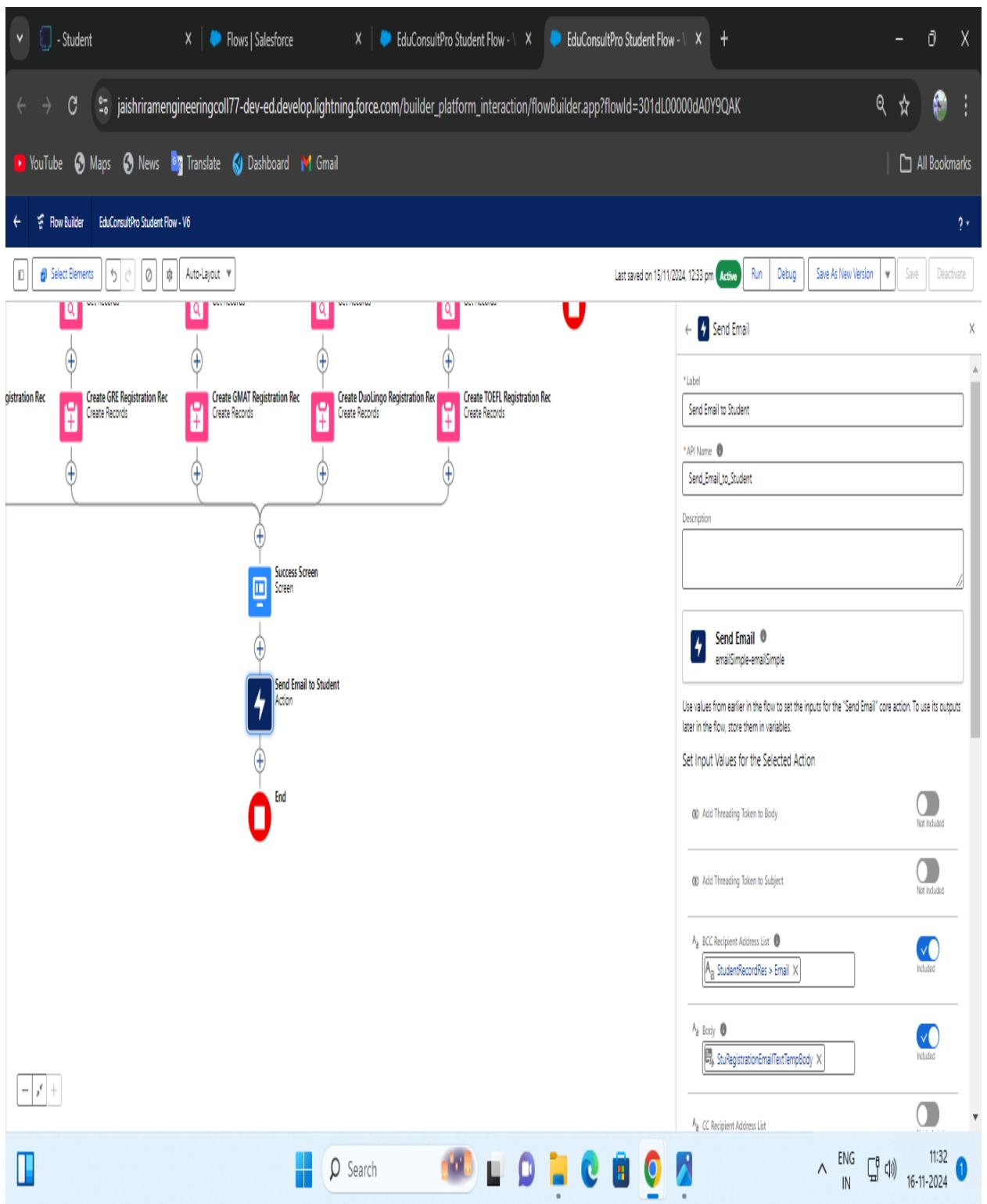


## Create Email Text Template Variables for email body and subject

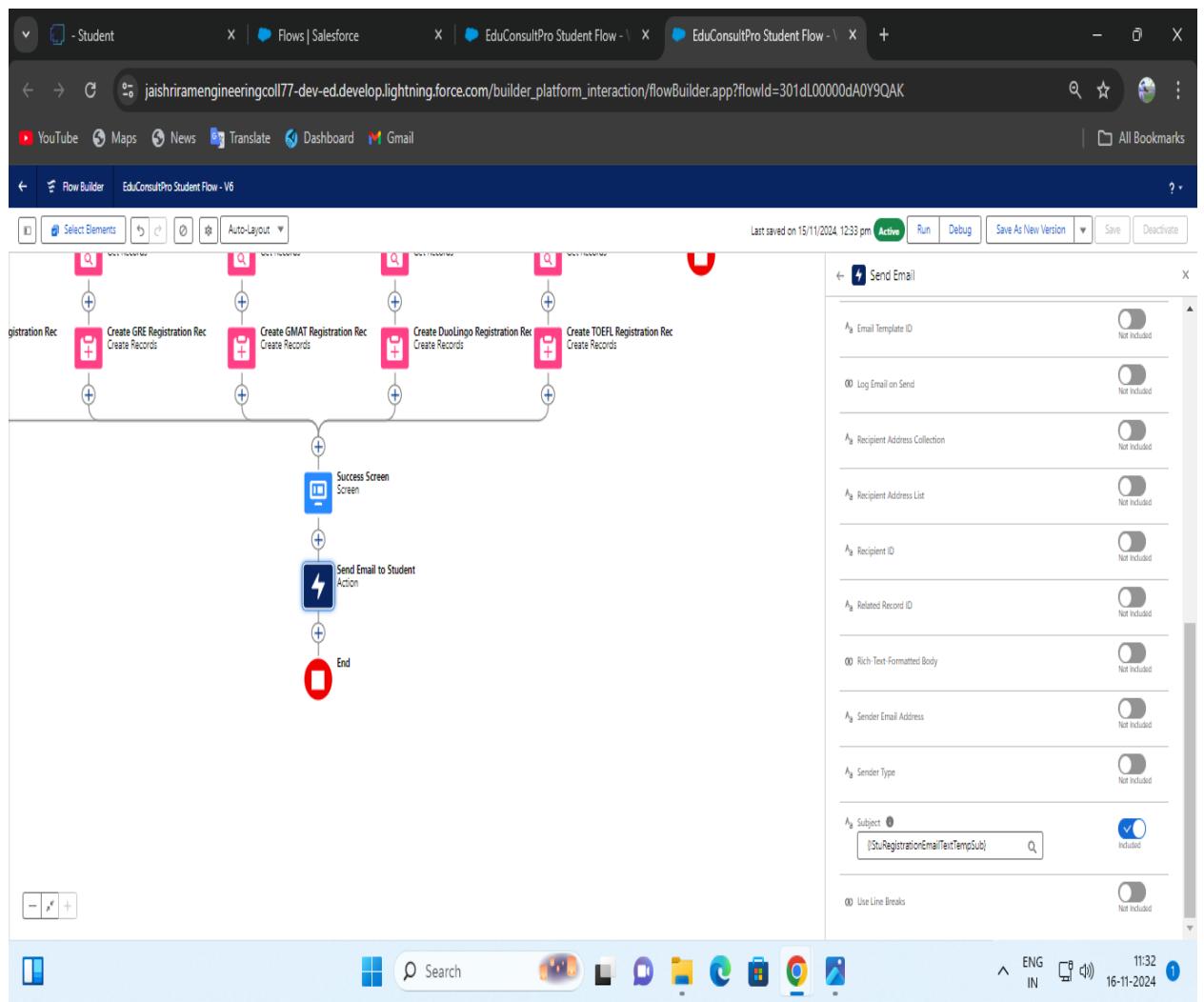
- StuRegistrationEmailTextTempBody* label name
- Send mail for text content*
- {!StudentRecordRes.Name}* add for the box.
- Repeat steps 1 & 2 to create an email text template for the email subject, label it as "StuRegistrationEmailTextTempSub", write a text message in the body and save it.*



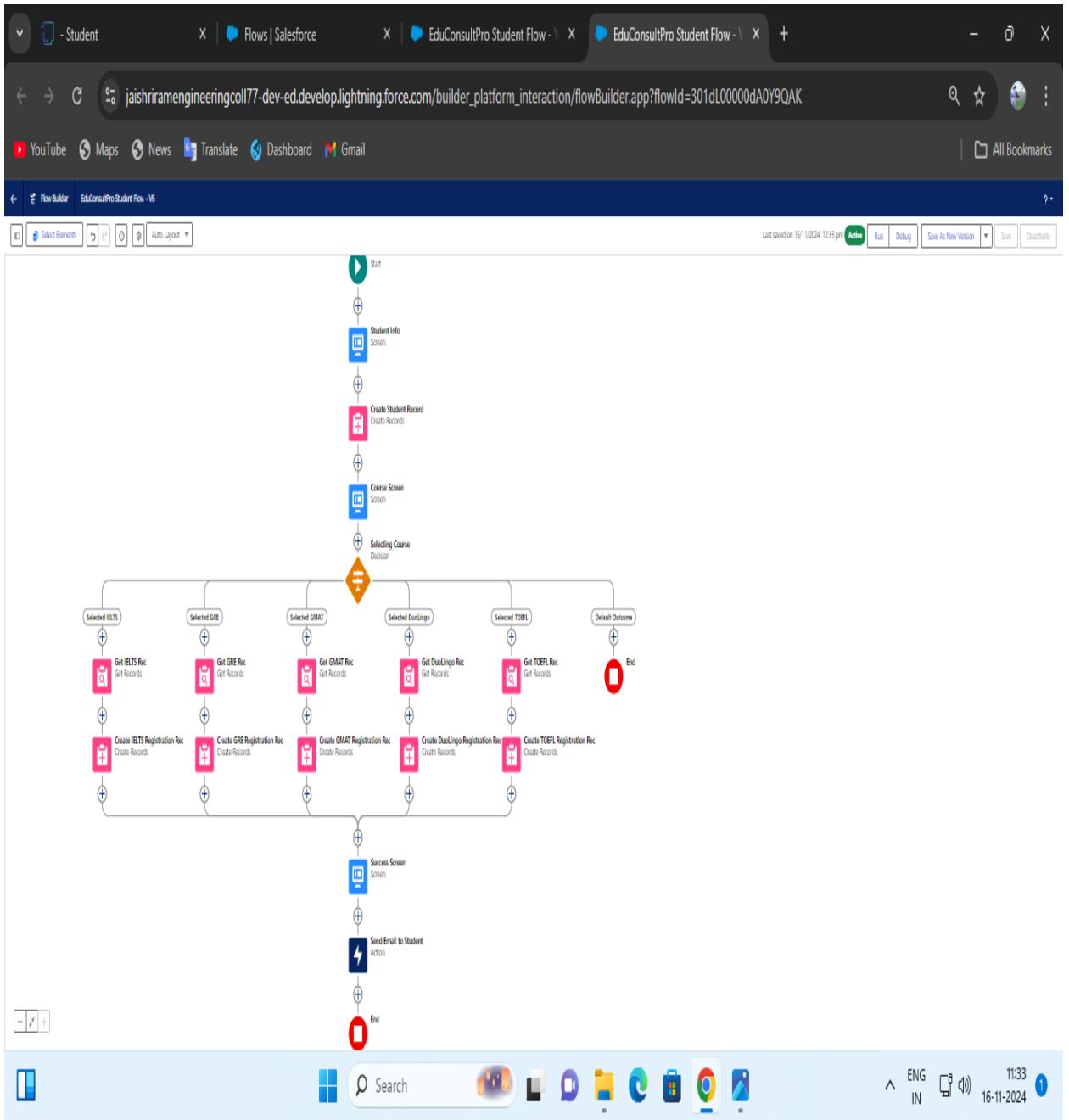
## Add an Action Element



## Add Screen Element



Save the flow and name it as “EduConsultPro Student Flow”



### 3) Create Users

*Create a user with a Standard platform user profile.*

# User

Go to Setup --> Administration --> Users --> New User

LastName : Consultant

License : Salesforce Platform

Profile : Standard Platform User and Fill all the mandatory fields & Save.

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes tabs for Student, Users | Salesforce, and a search bar. Below the header is a toolbar with links to YouTube, Maps, News, Translate, Dashboard, and Gmail, along with a 'All Bookmarks' dropdown. The main content area has a blue header with the word 'SETUP' and a user icon. The page title is 'Users'. A sidebar on the left lists various user management categories: Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a highlighted 'Users' category. Under 'Users', there are sub-links for Feature Settings, Data.com, and Prospectors. The main content area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. One row for 'Consultant' is selected. At the bottom of the table are buttons for New User, Reset Password(s), and Add Multiple Users. The bottom navigation bar includes links for A through Z, a search bar, and icons for Home, Object Manager, and Help.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	234_123	1234	rr12@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dd00000f0ng1uab.iwvdp8pgrgll@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Consultant	cons	vvvvvv123@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	maci	cmaci	machi@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	R_vigneshwaran	vR	vigneshnaanmudhalvan@jsr.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dd00000f0ng1uab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dd00000f0ng1uab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## Configure the User Settings

Screenshot of the Salesforce Setup interface showing the 'Users' page.

**General Information**

First Name	Consultant	Role	<None Specified>
Last Name	cons	User License	Salesforce Platform
Alias		Profile	Standard Platform User
Email	vvvvvv123@gmail.com	Active	<input checked="" type="checkbox"/>
Username	vvvvvv123@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User1731559611687287922	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	<None>
		Data.com Monthly Addition Limit	(300)

**Feature Settings**

- Feature Settings
- Data.com
- Prospector Users

Did you find what you're looking for?

Setup Home Object Manager

Search Setup

ENG IN 11:34 16-11-2024

Screenshot of the Salesforce Setup interface showing the 'Users' page.

**Single Sign On Information**

Federation ID	
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**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

Generate new password and notify user immediately

Save Save & New Cancel

Did you find what you're looking for?

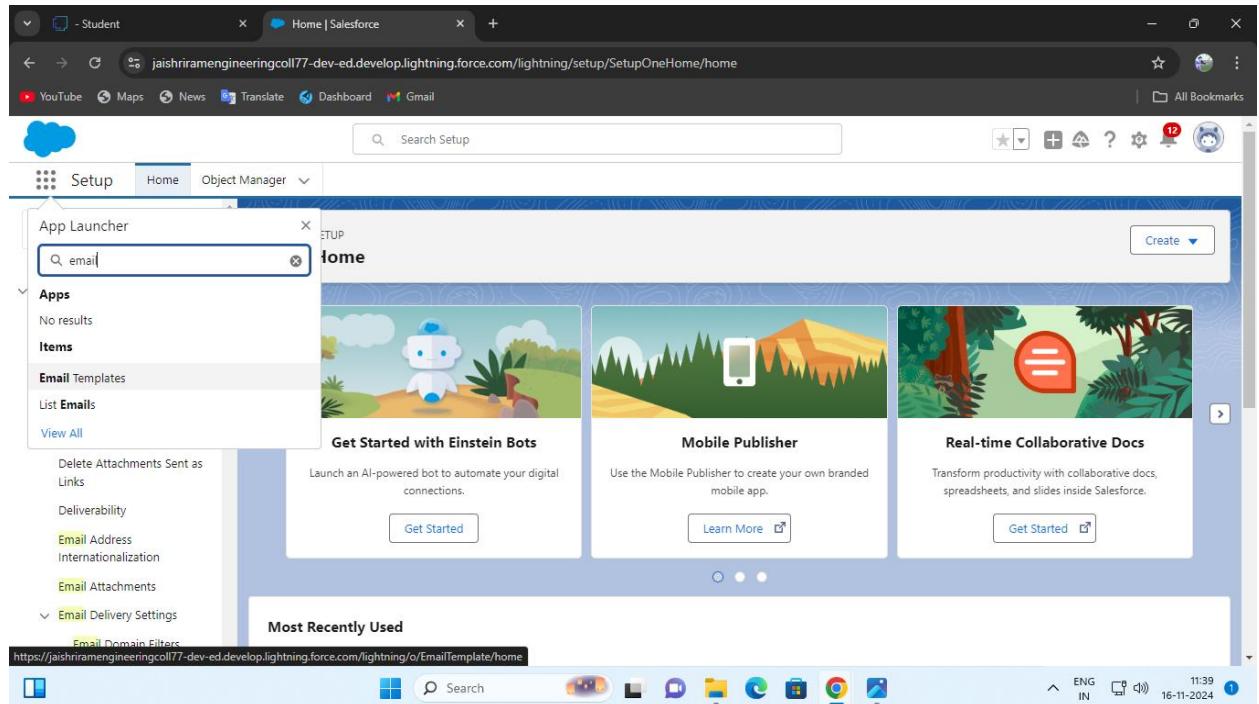
Setup Home Object Manager

Search Setup

ENG IN 11:34 16-11-2024

## 4) Create an Approval Process for Property Object

### Create an Email Template



#### New Email Template

**Information**

Email Template Name <input type="text" value="Student Request Template"/>	Related Entity Type <input type="text" value="Appointment"/>
Description <input type="text"/>	Folder <input type="text" value="EduConsultantPro"/> <input type="button" value="Select Folder"/>

**Message Content**

Subject <input type="text" value="Appointment Request with EduConsultantPro Consulta"/>	Enhanced Letterhead <input type="text" value="Search Enhanced Letterheads..."/> <input type="button"/>
HTML Value <div style="border: 1px solid #ccc; padding: 5px;"><p>Dear {{Appointment_c.Student_Name_c}}.</p><p>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}}.</p><p>Appointment Details: Appointment No : {{Appointment_c.Name}}, Student Name : {{Appointment_c.Student_Name_c}}.</p></div>	
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

# Create an Approval Process

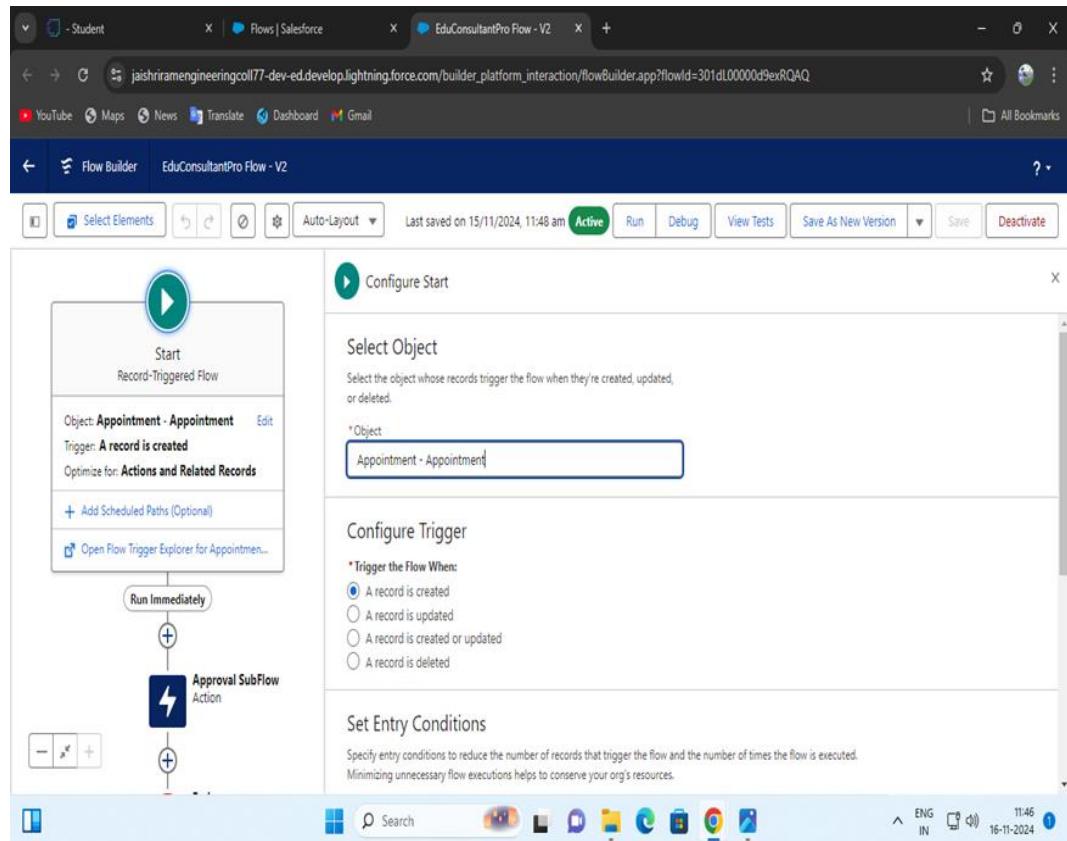
The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Process Automation', 'Approval Processes' is selected. The main area displays the 'Approval Processes' page with a sub-section titled 'Appointment Approval'. The sub-section is labeled 'Step 1, Enter Name and Description' and contains fields for 'Process Name' (Appointment Approval), 'Unique Name' (Appointment\_Approval), and 'Description'. The status bar at the bottom right indicates the date and time as 16-11-2024 11:40.

The screenshot shows the completed configuration of the 'Appointment Approval' Approval Process. The main section displays various settings: Unique Name (Appointment\_Approval), Record Eligibility (Administrator ONLY), Approval Assignment Email Template (Initial Submitters: Appointment - Appointment Owner), and Initial Submission Actions (Record Lock, Field Update, Email Alert). Below these, the 'Approval Steps' section shows a single step named 'Step 1'. The 'Final Approval Actions' and 'Final Rejection Actions' sections are also visible. The status bar at the bottom right indicates the date and time as 16-11-2024 11:41.

## Create an Approval Process for Property Object

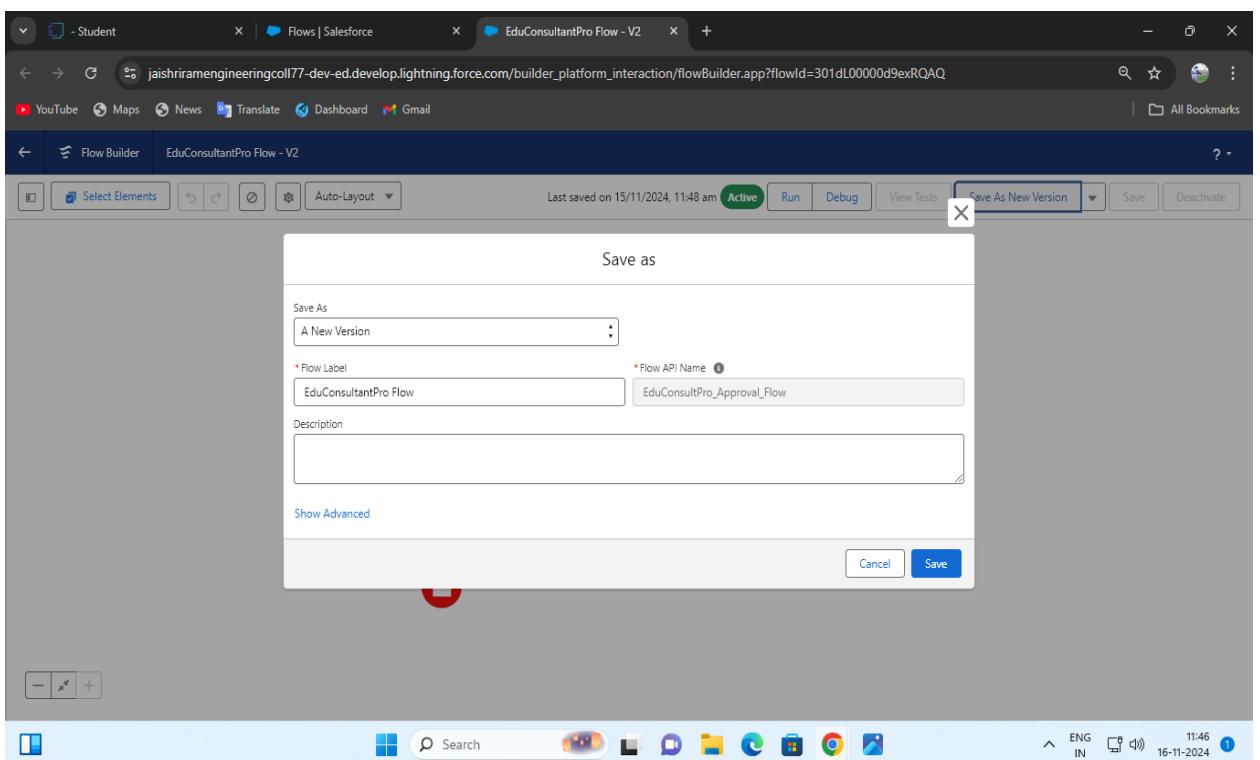
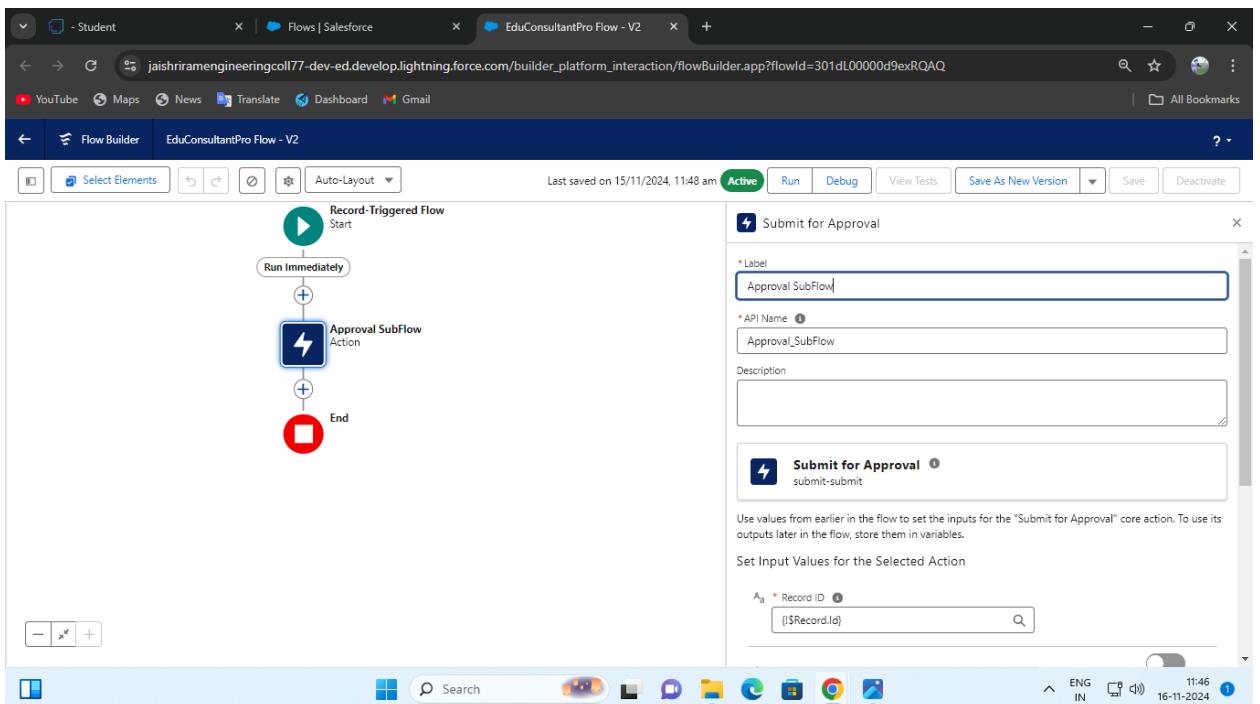
### Configure the Start Element

- a. Select Record-Triggered Flow**
- b. Create. The Configure Start window open**
- c. Save**



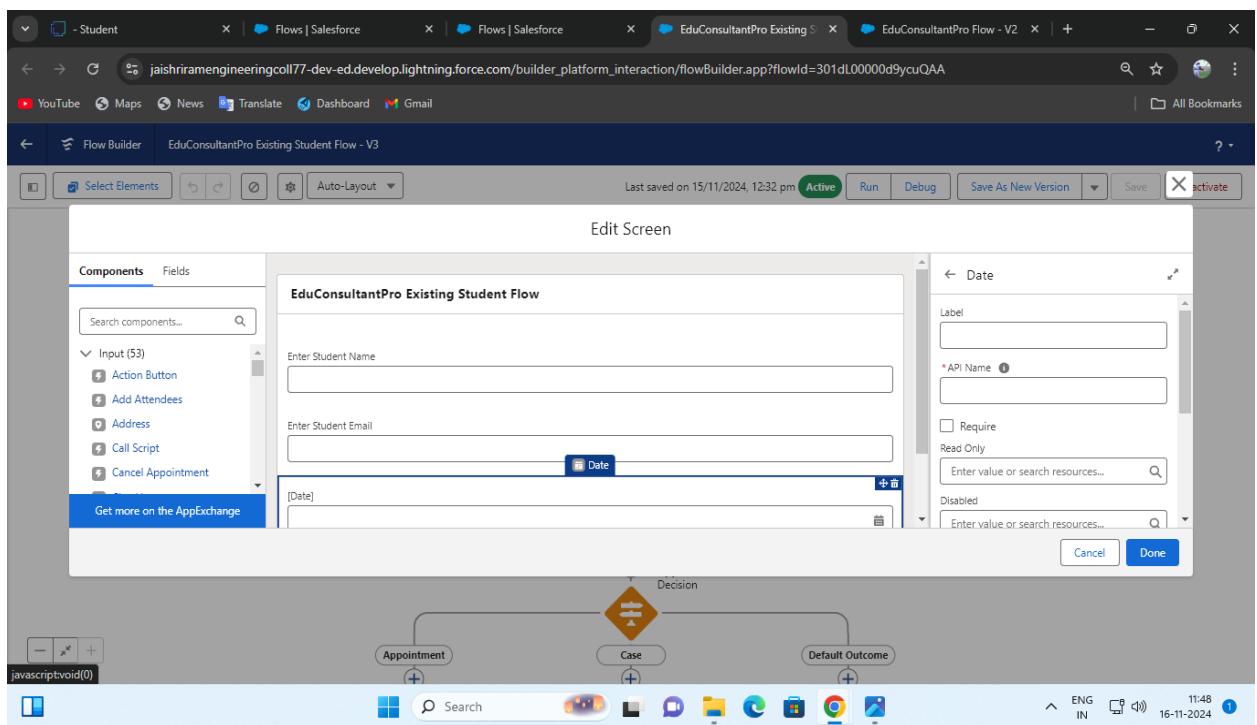
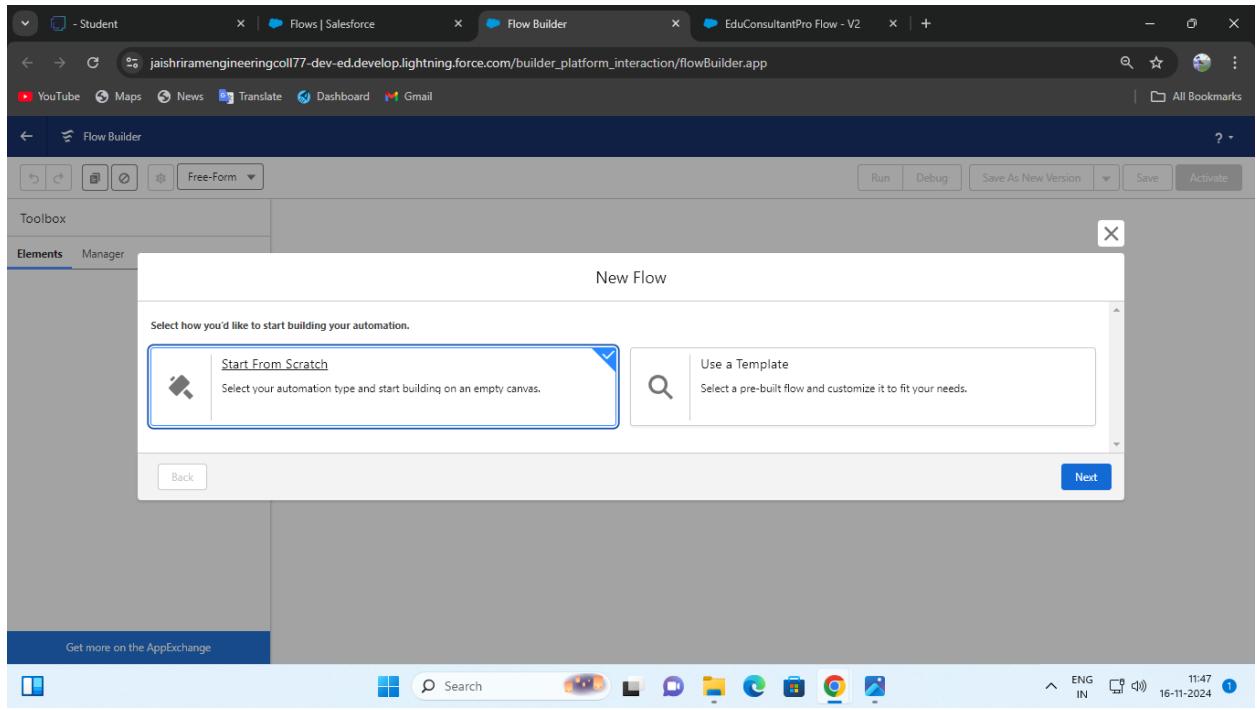
### Add an Action Element

- 1. Add an Action element after the Start Element and Select the Submit for approval action, label it as “Approval SubFlow”.**
- 2. Set the RecordId to “{\$Record.Id}”.**

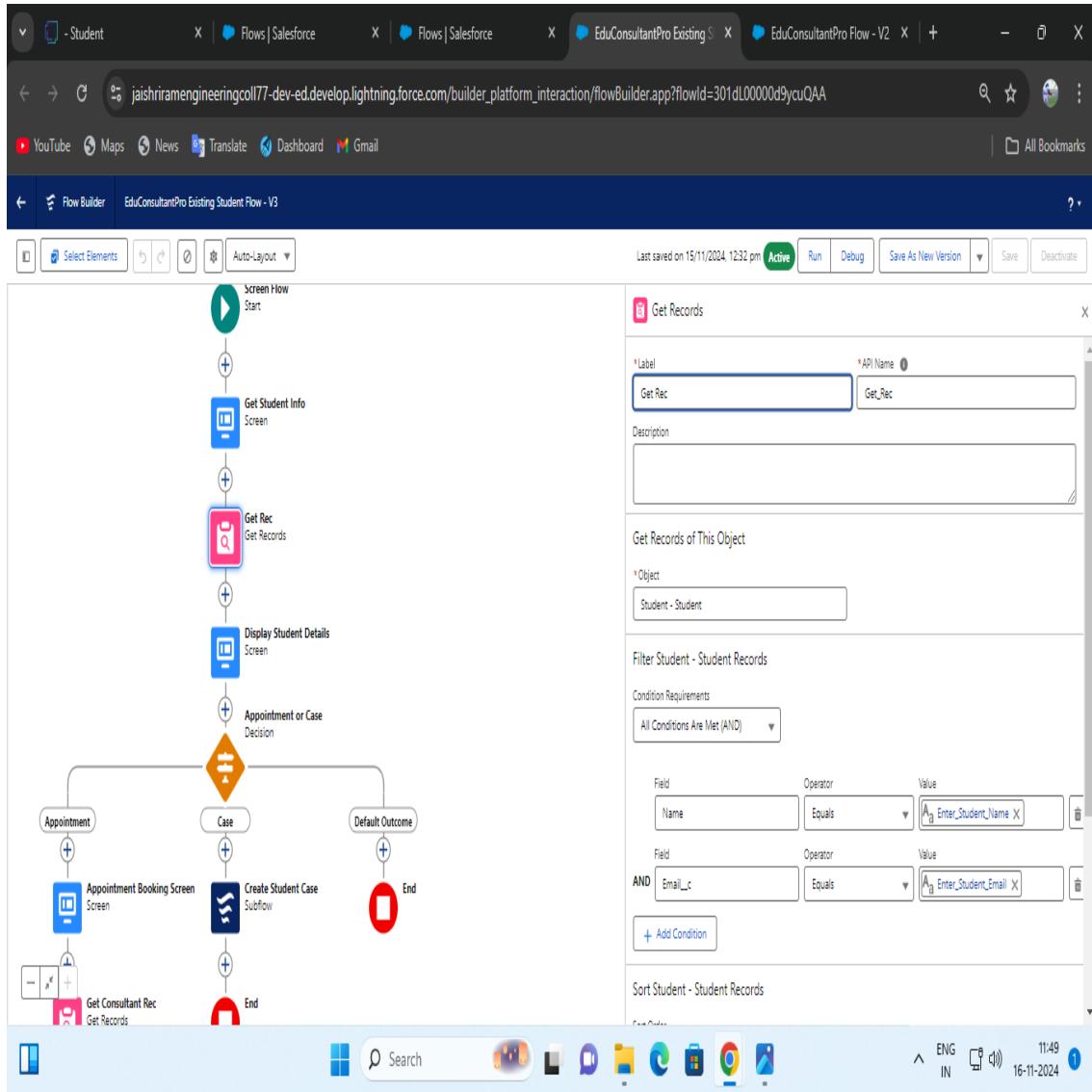


## **5)Create a ScreenFlow for Existing Student to Book an Appointment**

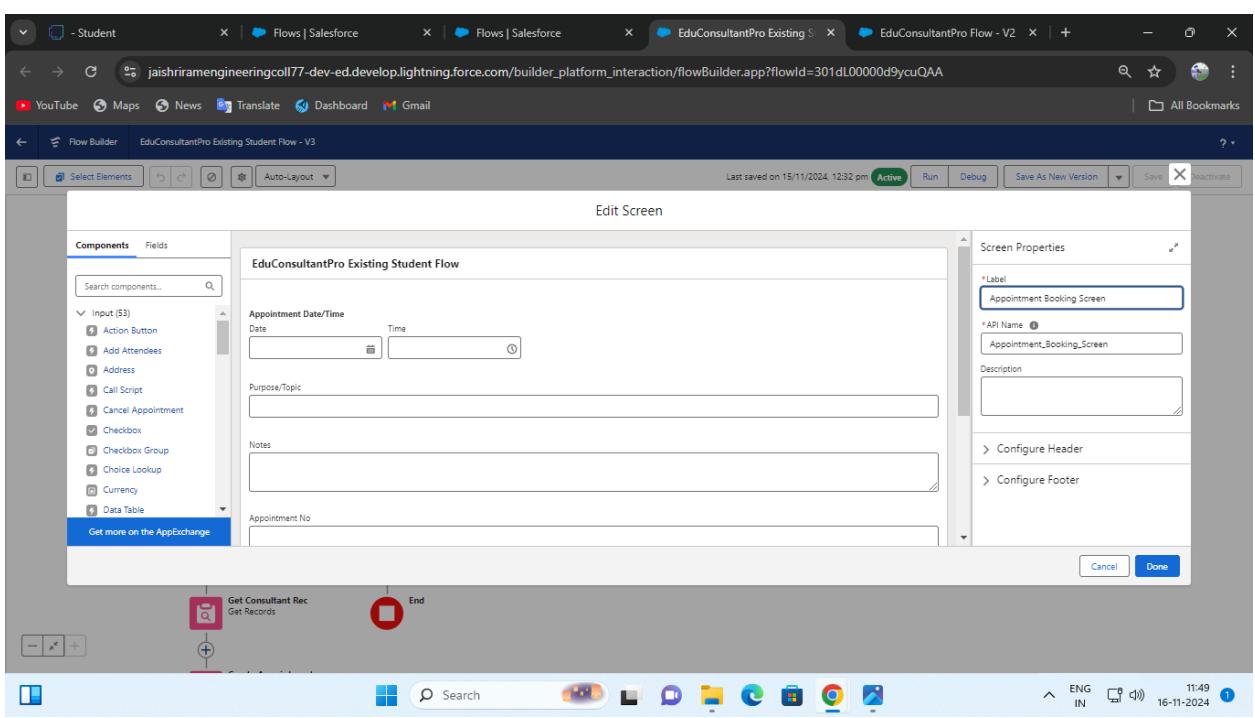
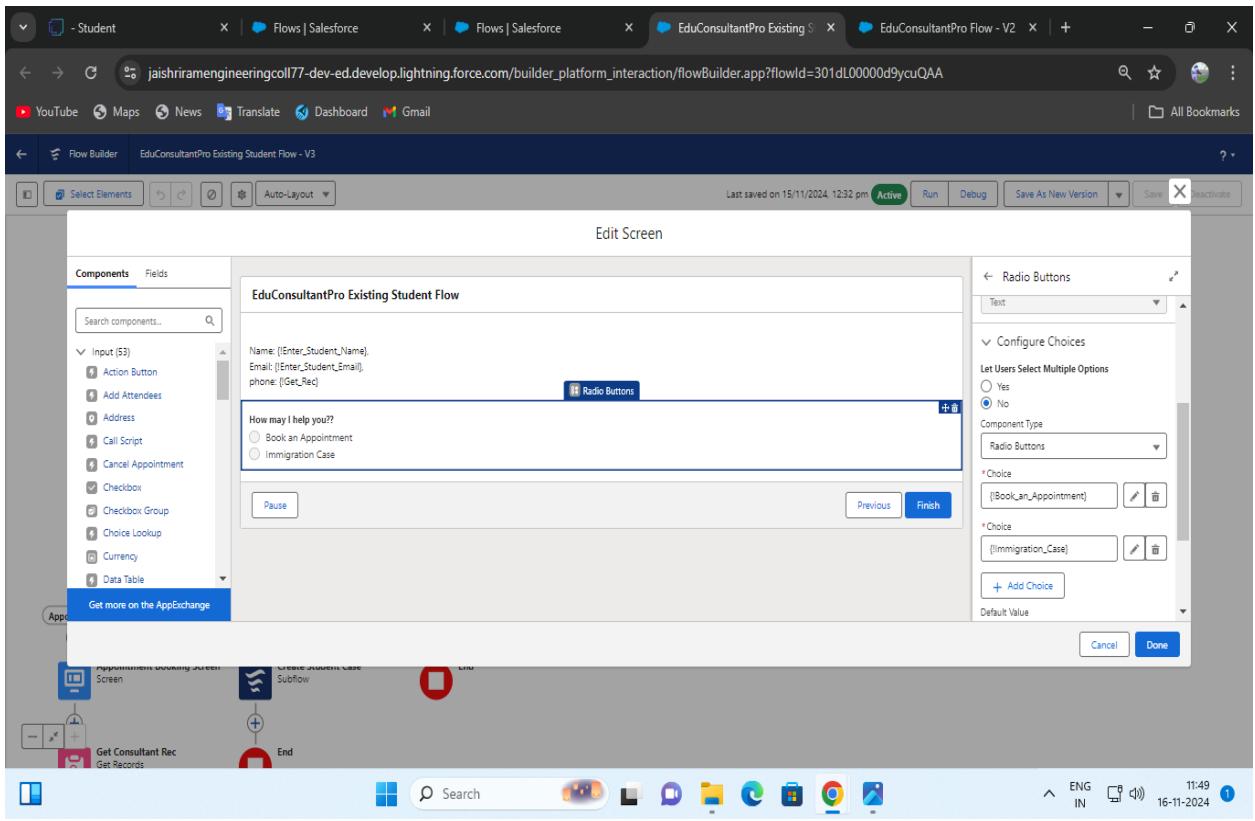
### **Add Screen Element**



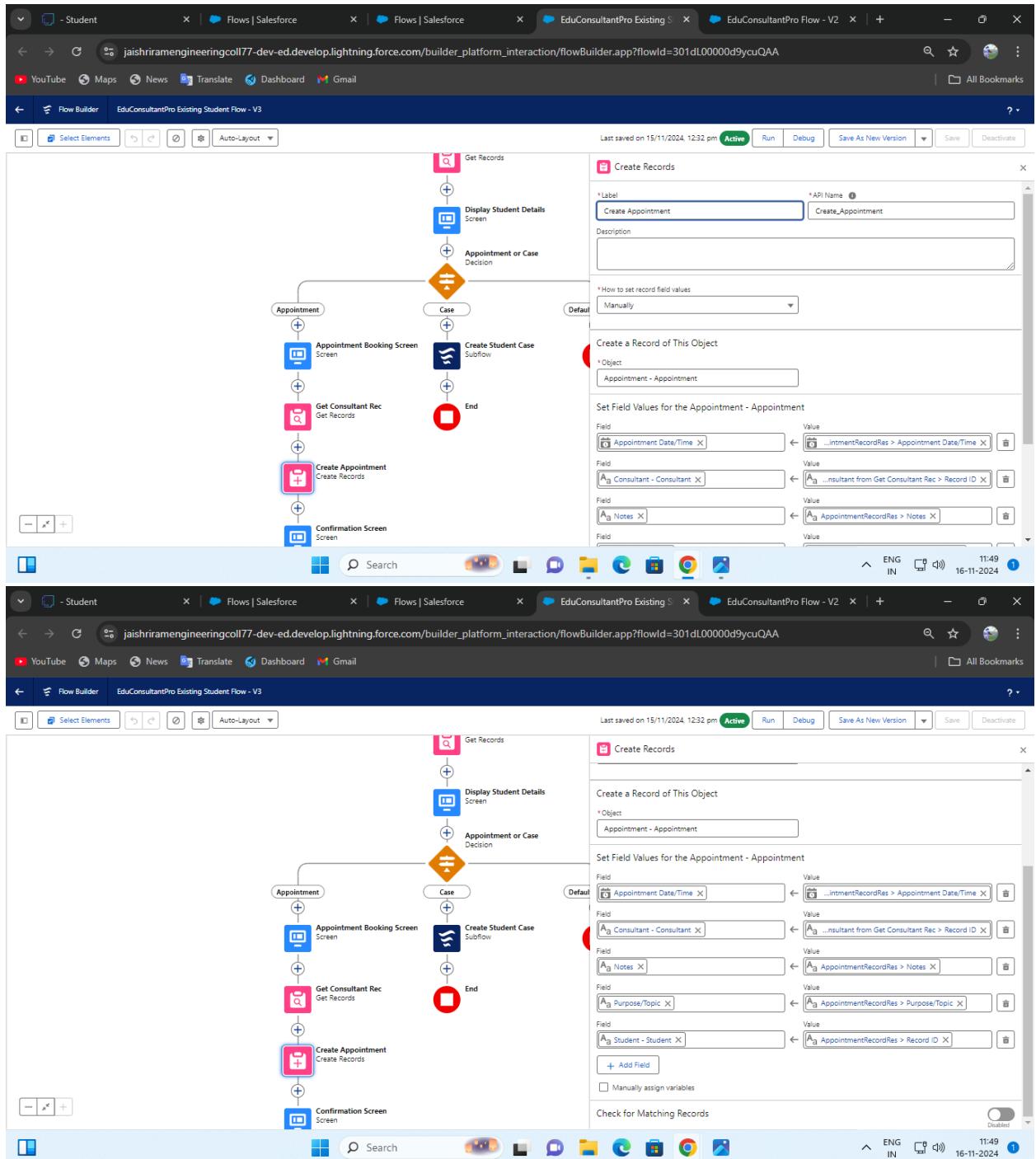
## Add GET Record Element



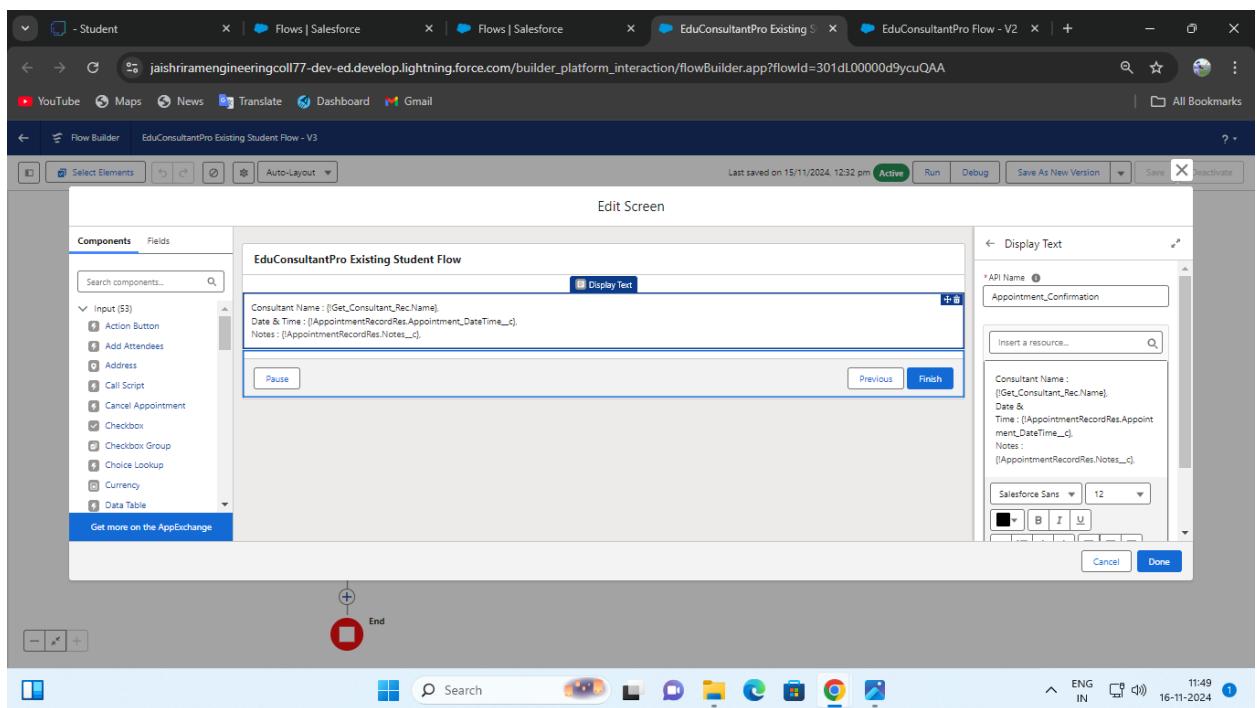
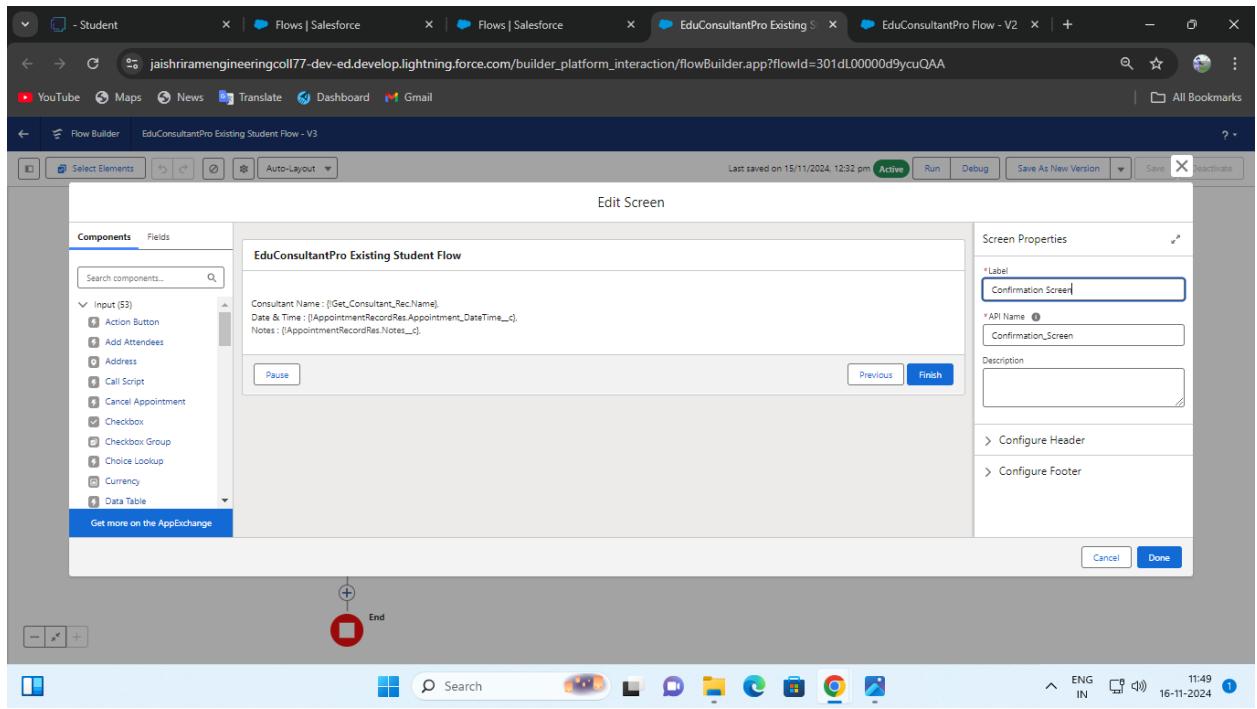
## Add Screen Element



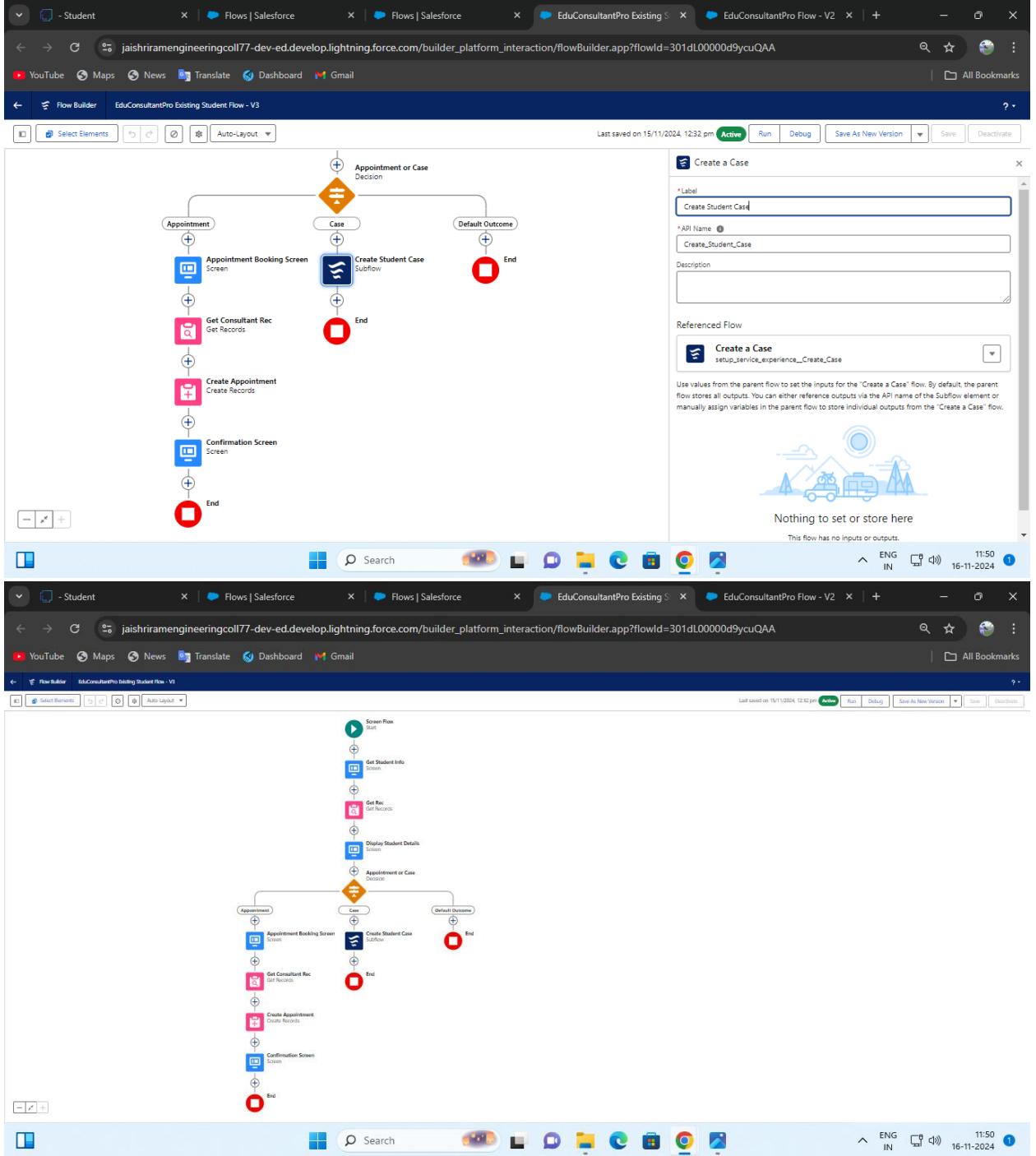
# Create Appointment Record using Create Records Element



## Add Screen Element



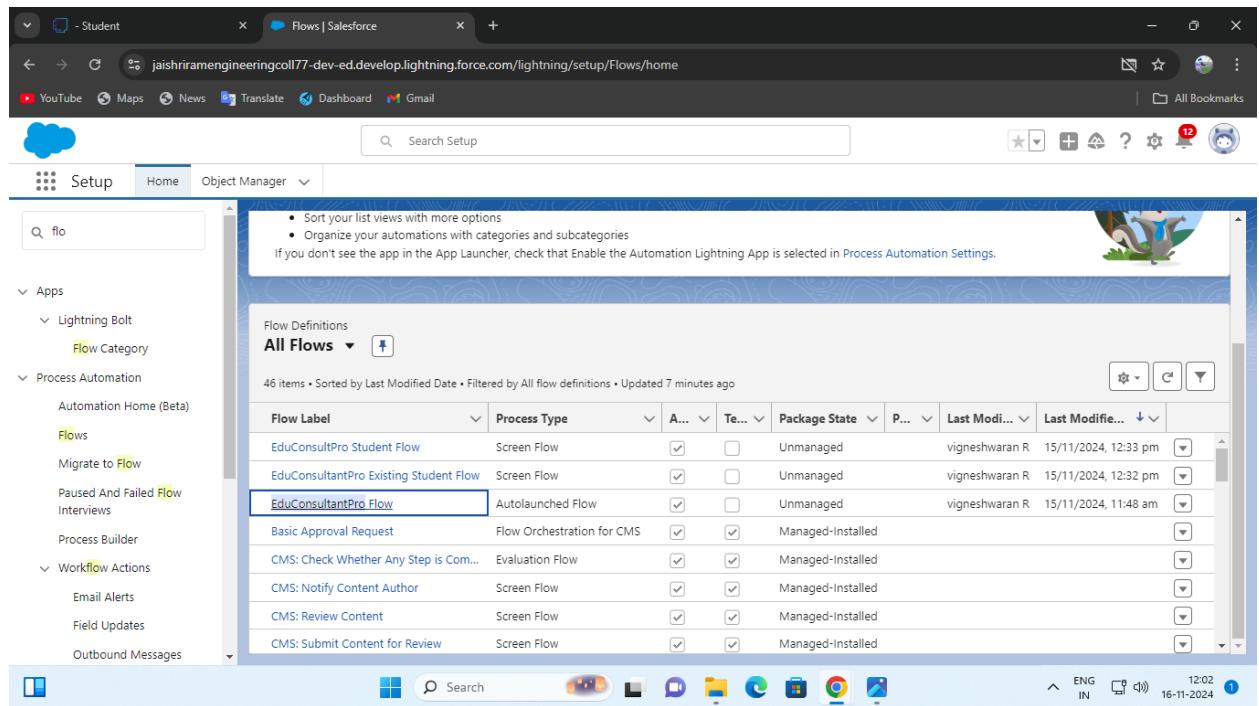
## Add an SubFlow Element



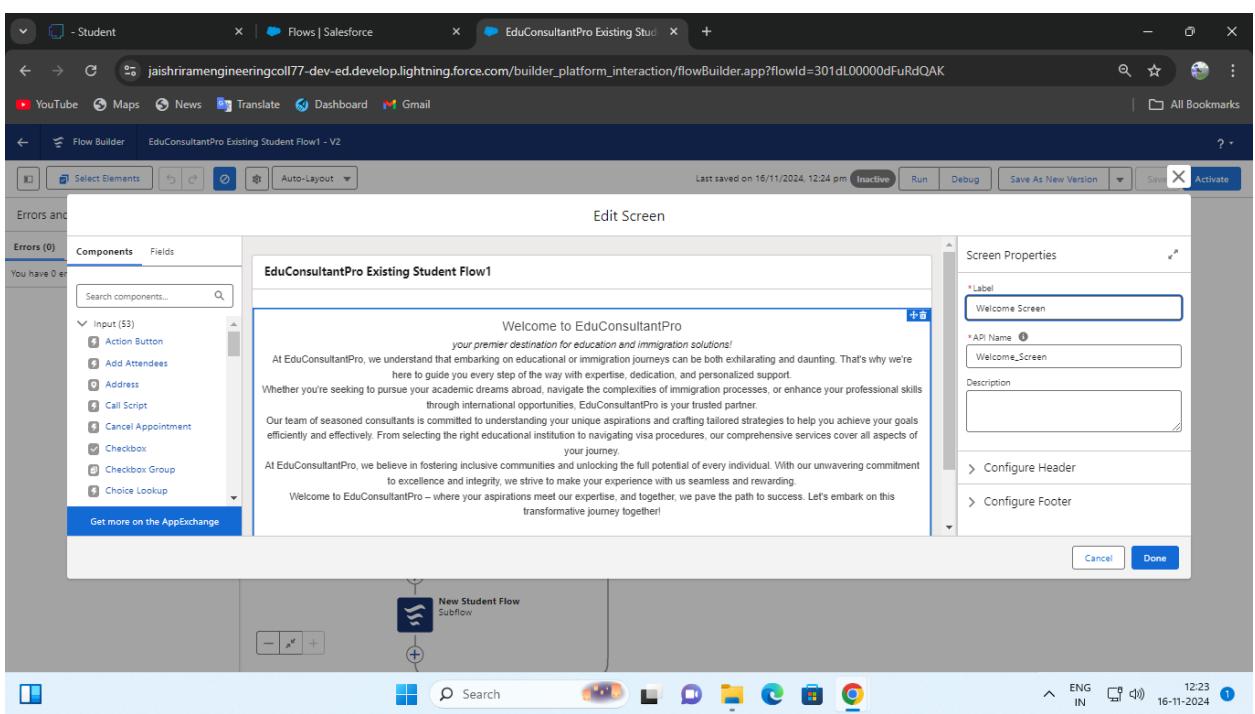
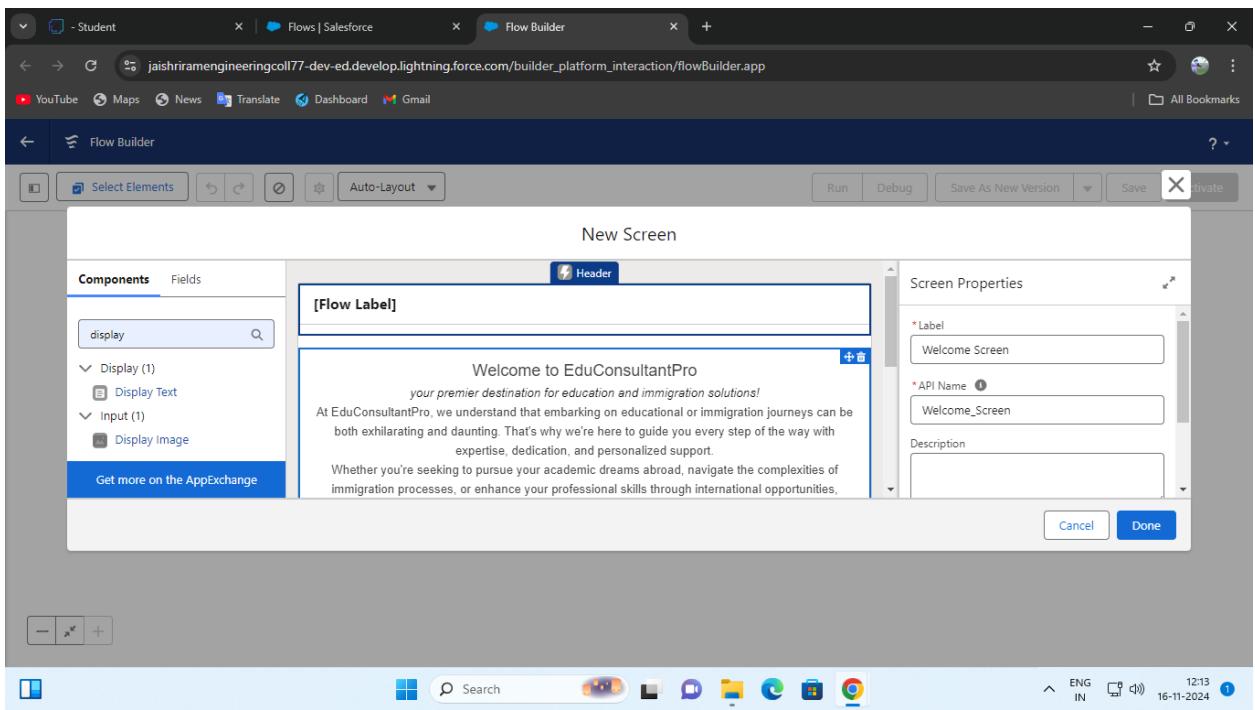
***Save the flow and label it as “EduConsultantPro Existing Student Flow”.***

## **7) Create a ScreenFlow to Combine all the flows at one place**

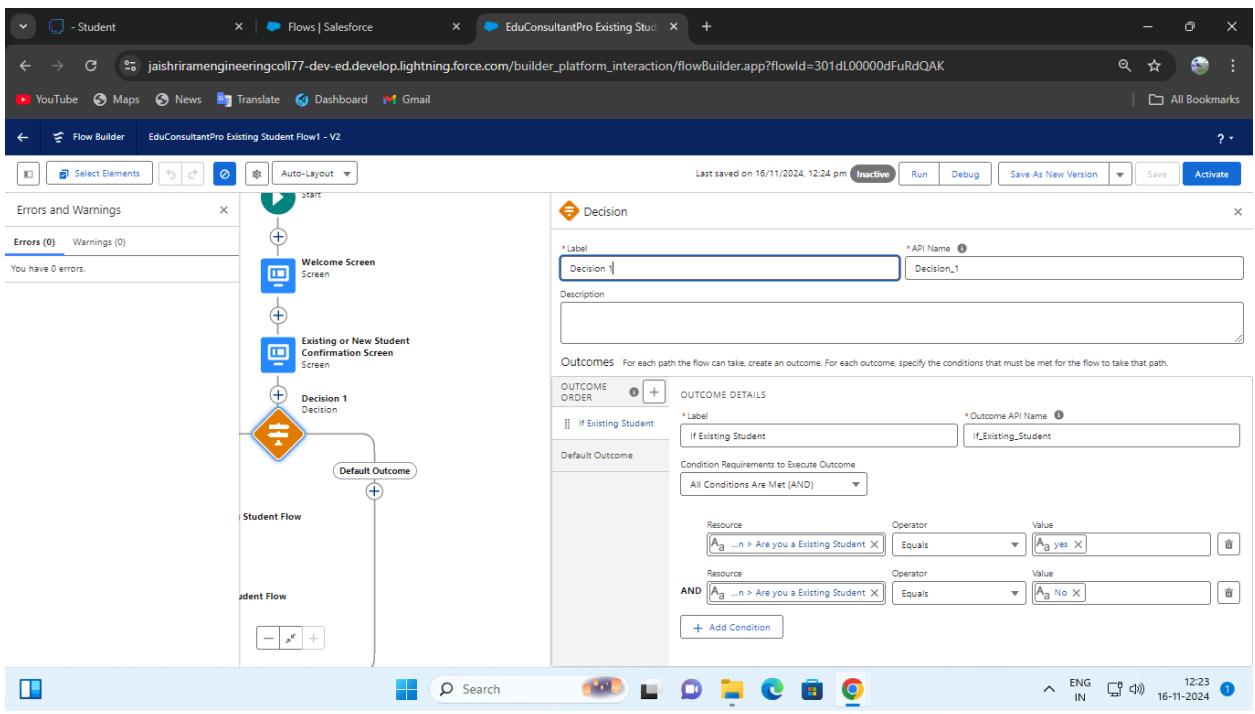
### **Add Screen Element**



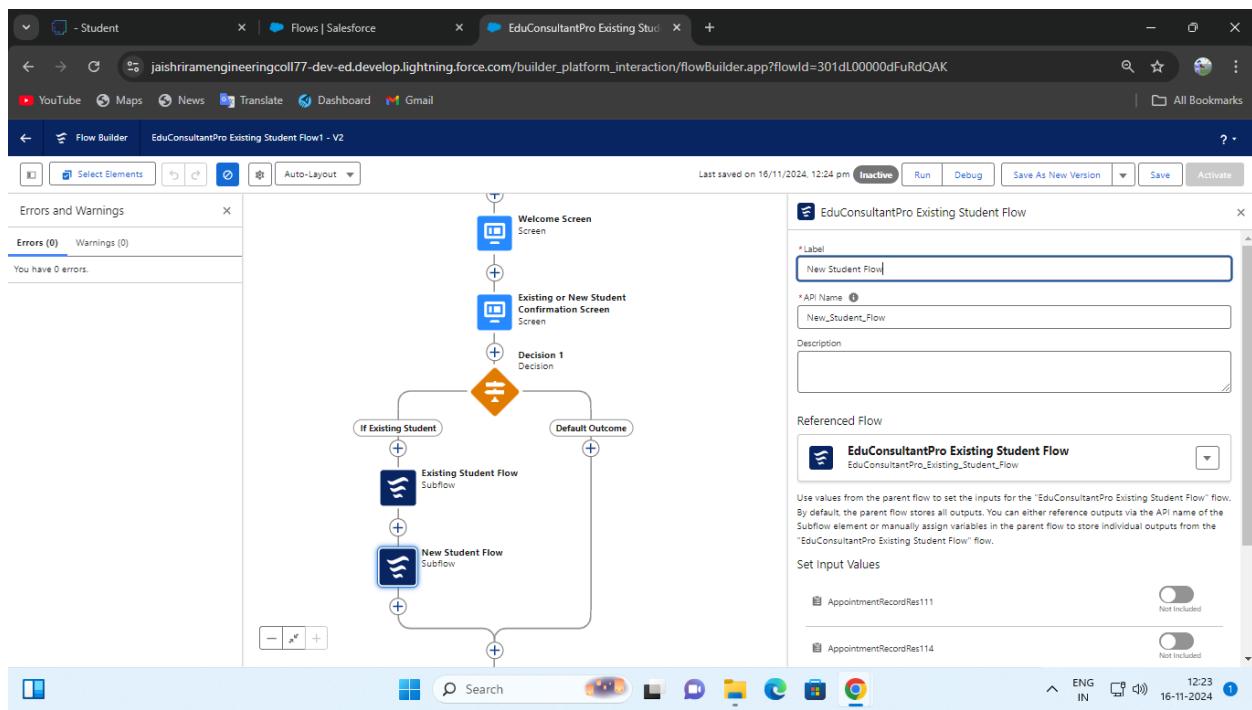
- 1. Add a Screen Element and label it as Welcome Screen.**
- 2. From the left side panel search for the Display text component and drag it to the main panel, label it as “SuccessMessage”.**



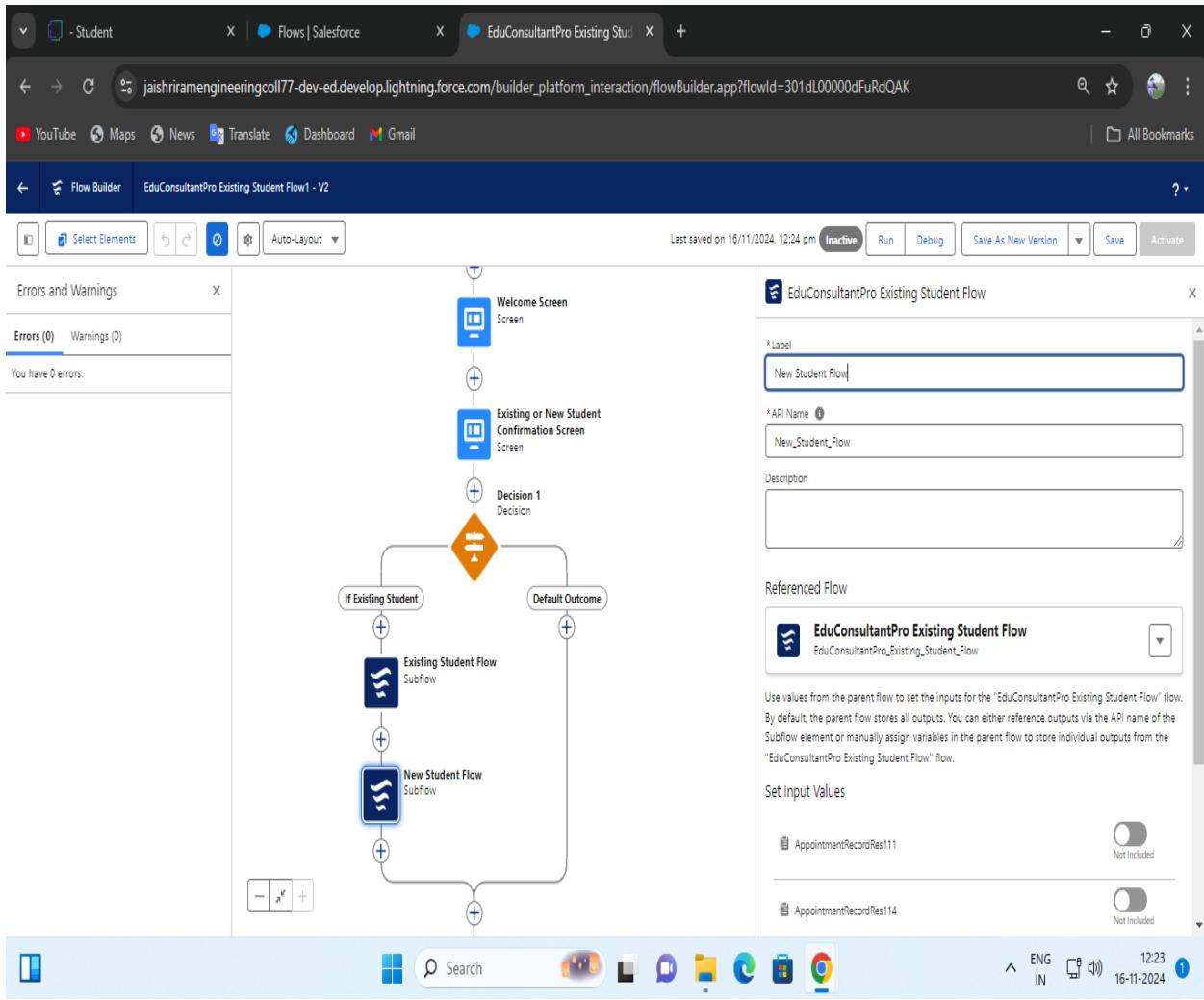
## Add Decision Element



## Add an SubFlow Element



## Add an SubFlow Element

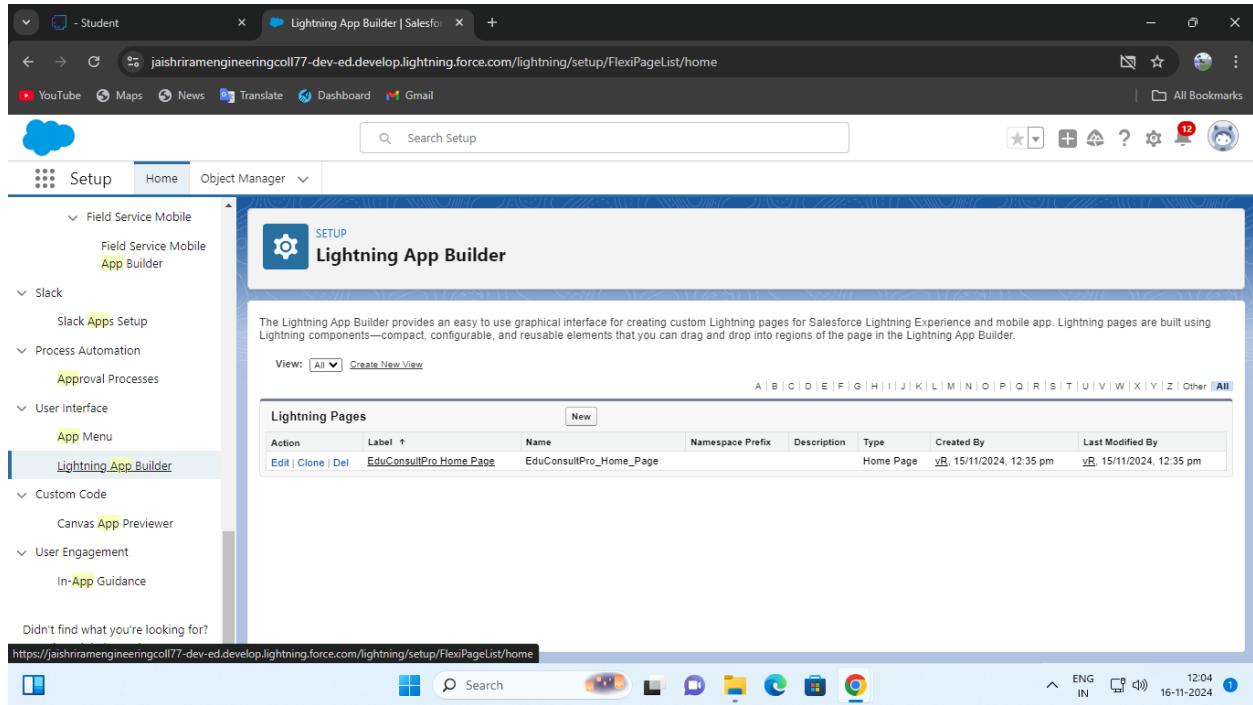


- a. finally to save the flows is
- b. EduConsultPro Flow
- c. Done and save
- d. Activate flows.

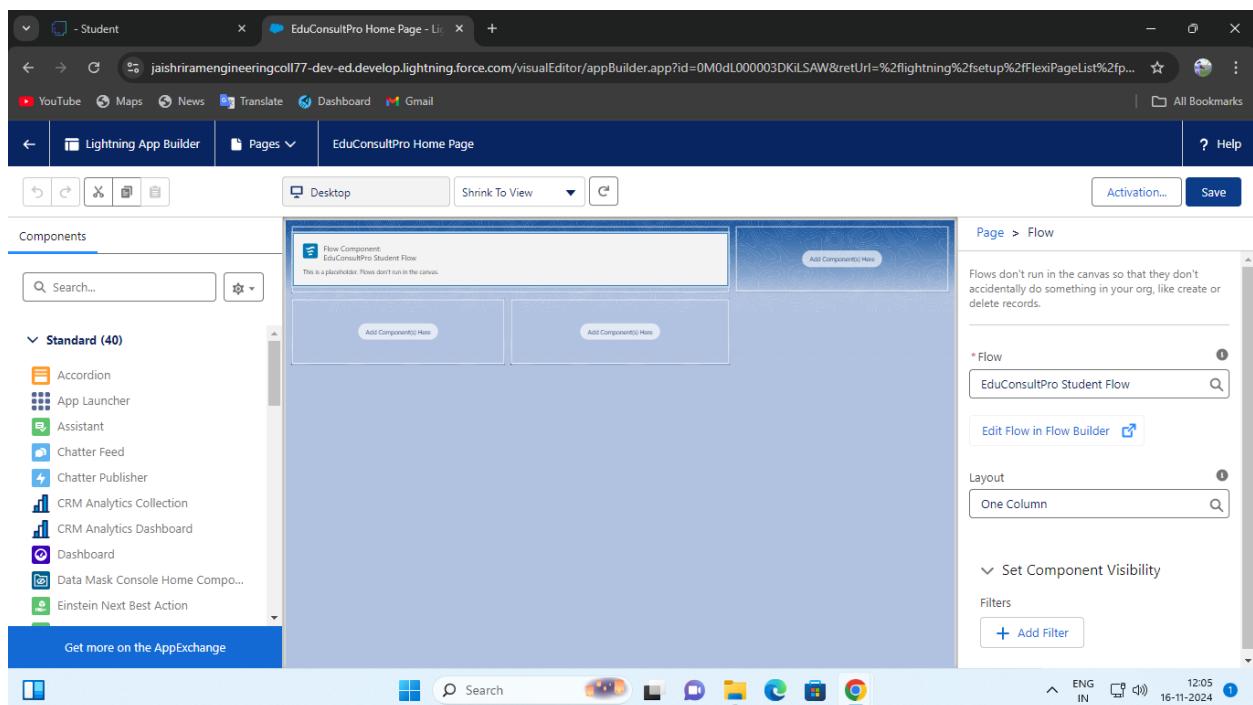
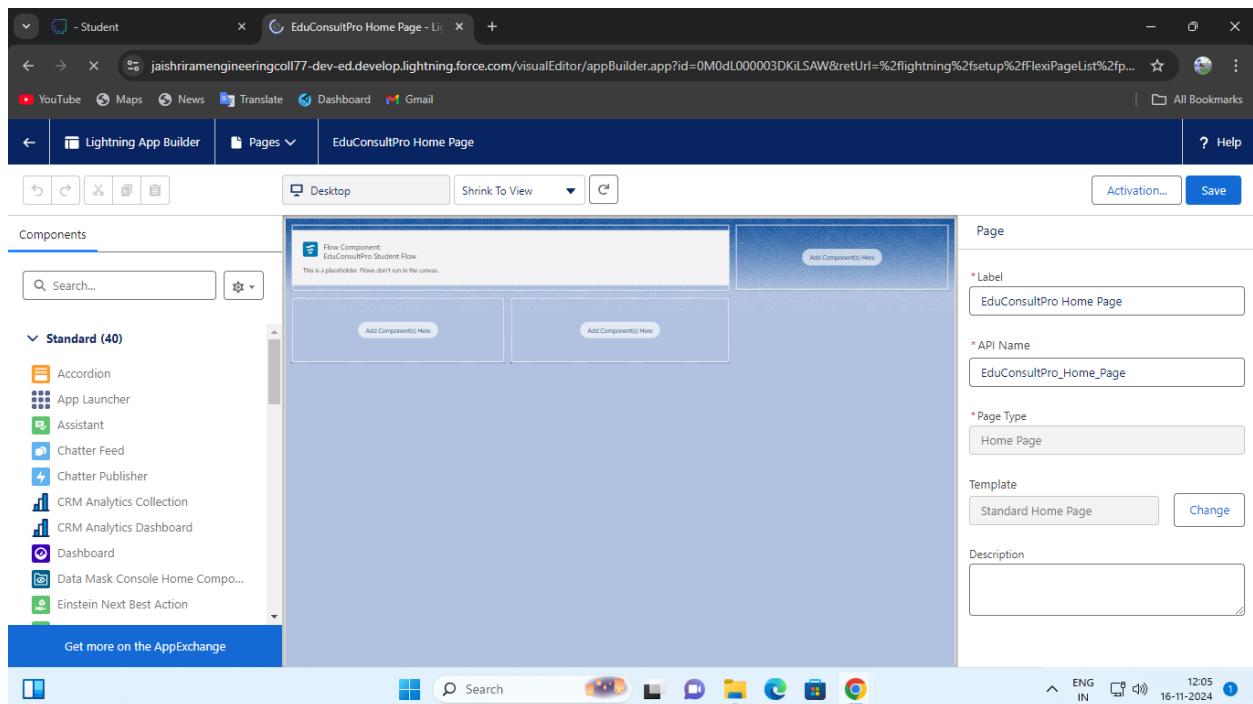
## 8) Create a lightning app page

**Create a lightning app page and make it available at the application**

**Create a lightning app page**



- a. **App Builder in the Quick Find box, then click Lightning App Builder**
- b. **EduConsultPro Home Page label name to create.**
- c. **Next .....next.**
- d. **Drag the Flow component to the top-right region**
- e. **Search for the “EduConsultantPro Flow” and click Save.**

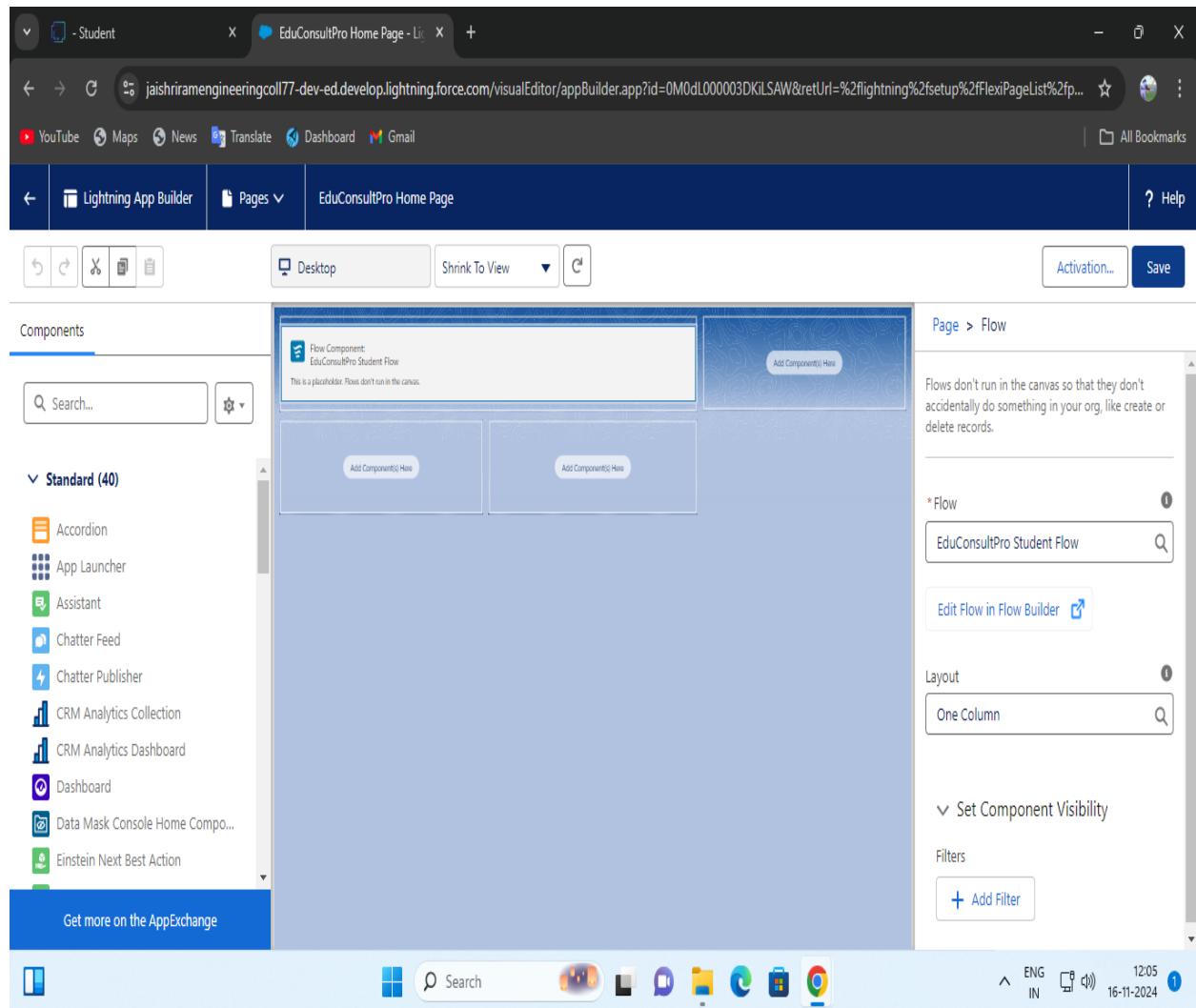


**f. Click Activate, Click App and Profile, then click Assign to Apps and Profiles.**

**g. Select the Sales app, then click Next.**

**h. Scroll down the list of profiles and select System Administrator, then click Next.**

**i. Review the assignment, and then click Save.**



Salesforce - Student

Lightning App Builder | Salesforce

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YouTube Maps News Translate Dashboard Gmail All Bookmarks

Cloud Search Setup

Setup Home Object Manager

Field Service Mobile

Field Service Mobile App Builder

Slack Slack Apps Setup

Process Automation Approval Processes

User Interface App Menu Lightning App Builder

Custom Code Canvas App Previewer

User Engagement In-App Guidance

The Lightning App Builder provides an easy to use graphical interface for creating custom Lightning pages for Salesforce Lightning Experience and mobile app. Lightning pages are built using Lightning components—compact, configurable, and reusable elements that you can drag and drop into regions of the page in the Lightning App Builder.

View: All Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

**Lightning Pages**

Action	Label ↑	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
Edit   Clone   Del	EduConsultPro_Home_Page	EduConsultPro_Home_Page			Home Page	vB, 15/11/2024, 12:35 pm	vB, 15/11/2024, 12:35 pm

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https://jaishriramengineeringcoll77-dev-ed.lightning.force.com/lightning/setup/FlexiPageList/home

Search

12:04 16-11-2024