

A Project Ready Talent Program

Salesforce CRM Project Documentation for EduConsultPro

by

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1. Project Overview

EduConsultPro Institute, a premier educational institution, offers a wide range of courses and services. As the institution grows, managing student admissions, consulting services, and immigration cases becomes increasingly complex. To address these challenges, the institute has decided to implement Salesforce CRM, a powerful platform that can automate processes, streamline workflows, and provide real-time insights.

This document provides a detailed overview of the Salesforce CRM solution for EduConsultPro, describing its features, technical architecture, configuration steps, and expected benefits.

2. Objectives

The primary objectives of implementing Salesforce CRM at EduConsultPro are:

- **Streamline Admissions:** Automate and simplify the student admission process.
- **Consulting Service Management:** Automate the intake, approval, and scheduling of consulting services.
- **Immigration Case Management:** Manage student immigration cases effectively, with automated case tracking and document handling.
- **Approval Processes:** Automate approval processes for consulting services and other administrative tasks.
- **Data Analysis and Reporting:** Provide dashboards and reports for better insights into application metrics, enrollment trends, and case statuses.

3. Key Functional Requirements

3.1 Admission Application Management

- **Student Enrollment Forms:** The system should allow prospective students to fill out an admission form that captures their personal details, academic history, and preferred courses.
- **Automation of Process:** After submission, student applications should be automatically stored in Salesforce. Automated email notifications should confirm submission and provide application status updates.
- **Reports and Dashboards:** Salesforce should generate real-time reports and dashboards to track the number of applications, acceptance rates, and other relevant metrics.

3.2 Consulting Services Management

- **Consulting Requests:** Prospective students should be able to submit requests for consulting services, including areas of expertise required and preferred times for consultations.
- **Consultant Assignment:** The system should assign consultants automatically based on the expertise requested and the availability of the consultant.
- **Appointment Scheduling:** The consultant and student should be able to schedule appointments, track the status (scheduled, completed, canceled), and receive notifications about appointment changes.

3.3 Immigration Case Management

- **Case Submission:** Students should be able to initiate immigration cases through various communication channels, including phone, email, or the website.
- **Document Management:** All relevant documents should be uploaded and stored securely within Salesforce.
- **Case Status Tracking:** Each immigration case should be tracked for its status (e.g., open, in progress, closed).
- **Automation and Notifications:** Immigration agents should receive automatic notifications whenever a new case is submitted or updated.

3.4 Approval Process

- **Consulting Service Approvals:** All consulting requests should go through an approval process to ensure that students are matched with the right consultant.
- **Automated Approval Workflow:** The approval process should automatically assign approvers based on the hierarchy and send out approval or rejection notifications to students.

4. System Configuration Steps

4.1 Create a Lightning App for EduConsultPro

To create a customized user interface for the users, we need to create a Lightning App in Salesforce:

1. **Setup the App:**
 - Go to **App Manager** in Setup and select **New Lightning App**.
 - Name the app **EduConsultPro** and proceed through the app creation wizard.
 - Add important objects such as **Home, Students, Courses, Consultants, Appointments, Registrations, and Cases** to the app's navigation items.
 - Assign the **System Administrator** profile to the app and save it.
 - Once created, the app will serve as the main interface for users to manage all student-related activities.

4.2 Configure the Approval Process for Consulting Requests

1. **Create the Approval Process:**
 - Go to **Approval Processes** under Setup, select the **Appointment** object, and choose to create a new approval process using the **Jump Start Wizard**.
 - Name the process **Appointment Approval** and select **Manager** as the approver. The approver will be automatically assigned using the standard hierarchy.
2. **Initial Submission Actions:**
 - Add a **Field Update** action to set the **Appointment Status** to **Pending** when the request is submitted.
 - Add an **Email Alert** to notify both the student and the assigned consultant about the submission.

3. Final Approval Actions:

- Define the actions to be taken once a consulting request is approved, such as confirming the appointment and sending notifications.
- Save and activate the approval process.

4.3 Create and Configure Lightning Pages

1. Create Home Page:

- Use **Lightning App Builder** to create a home page named **EduConsultPro Home Page**.
- Add the **Flow Component** to the page to guide users through the admission or consulting service request processes.
- Assign this home page to the **Salesforce App** and make it accessible to **System Administrators** and other users.

2. Create Student and Consultant Flows:

- **Student Flow:** Create a flow to capture student data, determine if the student is new or existing, and route them to the appropriate process.
- **Consultant Flow:** Create a flow to assign the consultant to a specific request, schedule appointments, and update the appointment status.

5. Detailed Functional Workflows

5.1 Admission Application Process

1. **Step 1:** The prospective student visits the EduConsultPro portal and fills out the **Admission Application Form**. This form collects personal details, academic history, and course preferences.
2. **Step 2:** Upon submission, the application is automatically captured in Salesforce as a **Lead** record. The system triggers an automated **Email Notification** to acknowledge receipt of the application.
3. **Step 3:** The **Admissions Staff** reviews the application. The decision to accept or reject the application is recorded. If accepted, the student is moved to the next stage, and an **Email Notification** is sent to the student with the status of their application.
4. **Step 4:** The Admissions staff uses **Salesforce Reports** to track the number of applications, analyze trends, and measure acceptance rates.

5.2 Consulting Services Request

1. **Step 1:** Prospective students fill out a **Consulting Request Form**, which captures details like consultation preferences, areas of expertise, and preferred consultation times.
2. **Step 2:** The request is logged in Salesforce as a **Consulting Case**. Consultants are automatically assigned based on expertise and availability.
3. **Step 3:** **Consultants** receive a notification to review the case and schedule a consultation with the student. Both the consultant and the student can access the case in Salesforce, update statuses (e.g., scheduled, completed), and communicate.
4. **Step 4:** The consultant updates the case status to **Completed** once the consultation is finished, and both the student and consultant receive notification emails.

5.3 Immigration Case Management

1. **Step 1:** A student initiates an **Immigration Case** by filling out a case submission form either through the website, email, or by phone.
2. **Step 2:** The case is recorded in Salesforce as a **Case** record and assigned to an immigration officer for processing.
3. **Step 3:** The immigration officer reviews the case, uploads relevant documents, and updates the status of the case as it progresses.
4. **Step 4:** The student receives automated updates on their case status (e.g., case received, case in progress, case closed).

6. User Roles and Permissions

6.1 Profiles and Access Levels

- **System Administrator Profile:**
Has full access to all objects, records, and Salesforce settings. System administrators can manage all components, including creating reports, configuring approval processes, and customizing workflows.
- **Consultant Profile:**
Consultants can view consulting requests assigned to them, update the status of appointments, and communicate with students.
- **Student Profile:**

Students can submit applications, request consultations, track the status of their requests, and view the outcome of their immigration cases.

6.2 Role Hierarchy

- The role hierarchy is set to automatically assign managers as approvers for consulting requests, based on the submission details and team structure.

7. Data Security and Compliance

Salesforce will ensure that all student data is securely stored with proper encryption and access controls. Data protection features like field-level security will ensure that sensitive student information is only accessible to authorized users. Salesforce also complies with industry standards and regulations like **GDPR** and **CCPA** to protect student privacy.

8. Reporting and Analytics

Salesforce will provide custom reports and dashboards to track:

- **Student Admission Trends:**
Monitor the number of applications, acceptance rates, and trends over time.
- **Consulting Service Efficiency:**
Track the number of consulting requests, completed appointments, and feedback metrics.
- **Immigration Case Progress:**
Analyze the status of immigration cases, including pending, in progress, and completed cases.
- **Performance Metrics for Staff:**
Reports on consultant productivity, admissions team performance, and immigration case resolution times.

9. Future Enhancements

- **Artificial Intelligence (AI) Integration:**
Leverage AI to predict student behavior, such as which courses they might be interested in based on historical data.
- **Mobile Application:**
Develop a mobile application to allow students and staff to interact with the system on the go.
- **Third-Party Integration:**
Integrate with third-party tools for payments, document signing, and additional case management features.

10. Conclusion

The **EduConsultPro Salesforce CRM** project offers a comprehensive solution to automate and streamline various administrative tasks at EduConsultPro Institute. By integrating automated workflows, approval processes, and case management systems, the project significantly enhances operational efficiency and provides a better experience for both students and staff. The scalability and customization of Salesforce will allow EduConsultPro to adapt to future needs and enhance its service offerings.