A CRM Application to Manage the Services offered by an Institution

Description : The EduConsultPro Institute CRM application is a robust solution crafted to streamline and optimize the management of student admissions, inquiries, and consulting services. As the institution expands, handling an increasing number of prospective students and consulting requests requires an efficient system. This CRM integrates essential processes into one platform, automating tasks like application submissions, student follow-ups, and inquiry tracking. It captures detailed student information, automates communication, and ensures seamless interactions between students and staff. Additionally, the CRM facilitates the management of consulting services and immigration cases, offering a centralized approach that boosts operational efficiency and enhances service quality. By implementing this CRM, EduConsultPro Institute can focus on providing an outstanding educational experience while maintaining professional and responsive interactions with all stakeholders.

Tasks:

Task 1: Creating Objects from Spreadsheet

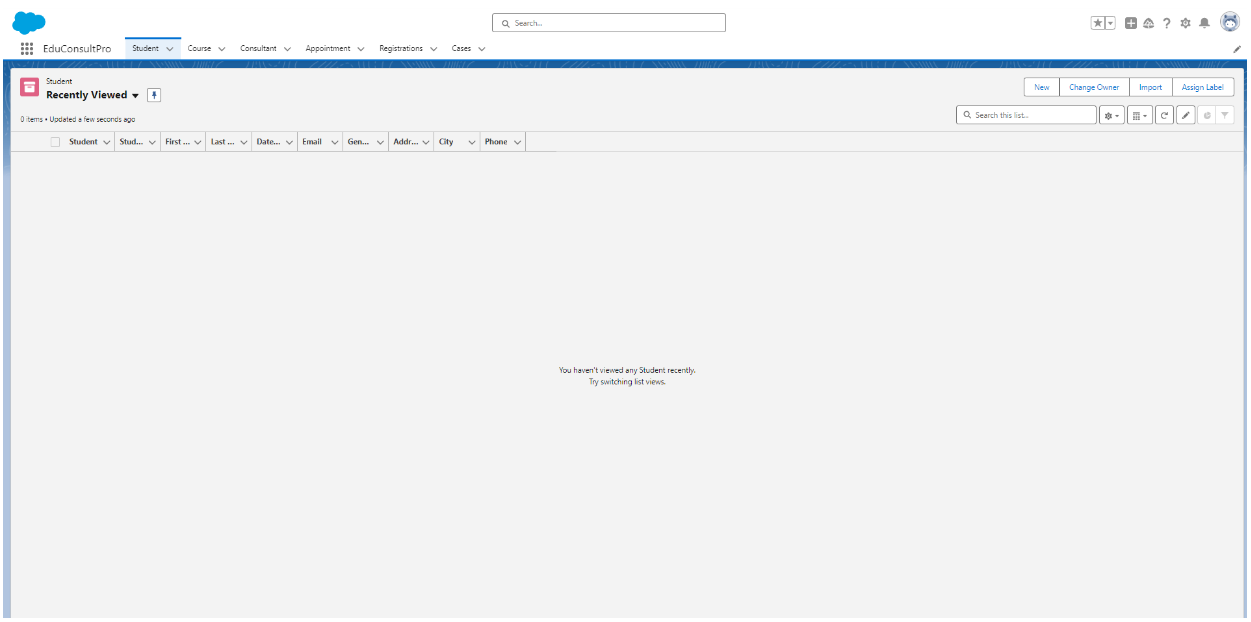
1. **Create Objects from Spreadsheet**
2. 1.1 **Create the Course Object**
    - **Access Object Manager:**
        - Go to Setup in Salesforce and search for Object Manager.
        - Choose "Create Object from Spreadsheet."
    - **Upload Spreadsheet:**
        - Download and upload the Course spreadsheet in Salesforce.
        -
        - Complete the upload to create the Course object.
3. 1.2 **Create Additional Objects**
    - Repeat the steps for the following objects:
        - Consultant (using Consultant spreadsheet)
        - Student (using Student spreadsheet)
        - Appointment (using Appointment spreadsheet)
4. **Creating Relationships Among Objects**
5. 2.1 **Create Lookups Between Appointment and Other Objects**
    - **Appointment to Student:**
        - In Object Manager, select Appointment.
        - Navigate to Fields & Relationships and click New.
        - Choose Lookup Relationship and select Student as the related object.
        - Save the relationship.

- **Appointment to Consultant:**
  - Repeat the process to create a lookup relationship between Appointment and Consultant.

6. 2.2 **Create the Registration Object and Its Relationships**
   - **Create Registration Object:**
     - Follow the object creation process using the Registration spreadsheet or manually create it in Object Manager.
   - **Create Lookups:**
     - Create lookup relationships between Registration and Student to link course registrations.
     - Also, create a lookup between Student and Case objects to manage student queries.
7. **Create Tabs for Objects**
   - **Create Object Tabs:**
     - Go to Setup and search for Tabs.
     - Create tabs for the following objects:
       - Course
       - Consultant
       - Student
       - Appointment
       - Registration
8. **Configure the Case Object**
9. 4.1 **Modify Case Fields**
   - **Edit Type Field:**
     - In Object Manager, select Case.
     - Navigate to Fields & Relationships and find the Type field.
     - Add the following values:
       - Immigration
       - Visa Application
   - **Edit Status Field:**
     - Locate the Status field.
     - Add the following values:
       - Open
       - In-progress
10. **Create a Lightning App**
11. 5.1 **Setup EduConsultPro App**
    - **App Manager:**
      - In Setup, search for App Manager.
      - Click on New Lightning App.
    - **App Configuration:**

- Name the app EduConsultPro and follow the prompts.
- Add the following items to the app:
    - Home
    - Students
    - Courses
    - Consultants
    - Appointments
    - Registrations
    - Cases

- **Assign Profiles:**
    - From the available profiles, select System Administrator.
    - Click Save & Finish to complete the app creation.



Task 2: Create a Screen Flow for Student Admission Application Process

1. **Create a New Screen Flow**
2. 1.1 **Access Flow Builder:**
    - In Setup, enter Flow Builder in the Quick Find box.
    - Click on New Flow and select Screen Flow.
3. **Add Student Info Screen Element**
    - **Add Screen Element:**
        - Drag a Screen element onto the canvas and label it as Student Info.
    - **Create and Configure StudentRecordRes Resource:**
        - Click on Fields in the screen element.
        - Select Create New Resource and choose Record (StudentRecordRes).
        - Map this resource to the Student object to pull in all fields from the

Student object.

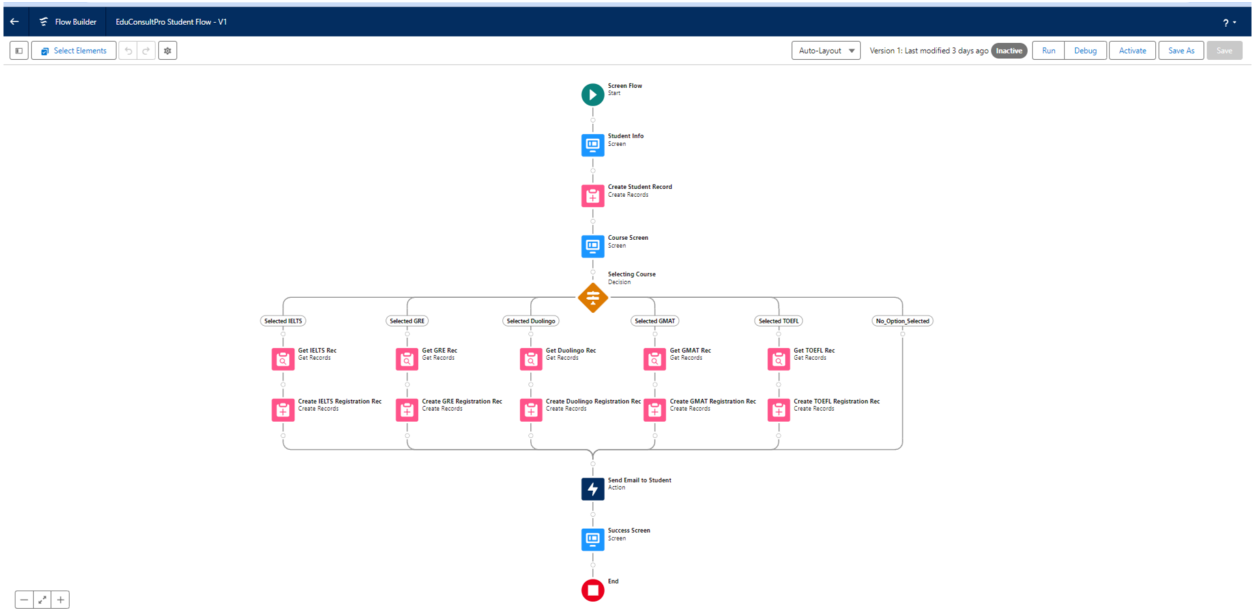
- **Add Fields to the Screen:**
  - Drag the necessary fields (e.g., Name, Email, Phone, Address) from StudentRecordRes onto the screen to collect student information.

4. **Create Student Record Using Create Element**
   - **Add Create Records Element:**
     - Drag a Create Records element onto the canvas after the Student Info screen and label it as Create Student Record.
   - **Configure the Create Element:**
     - Select One record to create.
     - Use all values from a record, choosing StudentRecordRes as the record variable.
5. **Add Course Selection Screen**
   - **Add Screen Element:**
     - Drag another Screen element onto the canvas after the Create Student Record element and label it as Course Screen.
   - **Add Picklist Component:**
     - Drag a Picklist component to the screen and label it as Select Course.
     - Add the following choices:
       - IELTS
       - GRE
       - GMAT
       - Duolingo
       - TOEFL
     - Each choice automatically creates a variable with the respective name.
6. **Add Decision Element for Course Selection**
   - **Add Decision Element:**
     - Drag a Decision element onto the canvas after the Course Screen and label it as Selecting Course.
   - **Configure Outcomes:**
     - For each course (IELTS, GRE, GMAT, Duolingo, TOEFL), create an outcome:
       - Outcome Label: For example, "Selected IELTS"
       - Resource: Select_Course
       - Operator: Equals
       - Value: IELTS (or the respective course)
7. **Add Get Record Element for Each Course**
   - **Add Get Records Element:**
     - Add a Get Records element under the path for each course and label it as Get IELTS Rec (or the respective course).
   - **Configure Get Record Element:**
     - Object: Course

- Condition Requirements: All Conditions are Met (AND)
- Field: Course Name
- Operator: Equals
- Value: {!Select_Course}

8. **Create Registration Record Using Create Records Element**
    - **Add Create Records Element:**
        - After each Get Records element, add a Create Records element and label it as Create IELTS Registration Rec (or the respective course).
    - **Configure Create Record Element:**
        - Object: Registration
        - How many records to create: One
        - How to Set the Record Fields: Use separate resources and literal values.
        - Field: Course_Name__c
        - Value: {!Get_IELTS_Rec.Id}
        - Field: Student_Name__c
        - Value: {!StudentRecordRes.Id}
9. **Create Email Text Template Variables**
    - **Create Email Body Template:**
        - Click on the toolbox toggle in the left corner and select New Resource.
        - Choose Text Template as the resource type.
        - Label it as StuRegistrationEmailTextTempBody.
    - **Create Email Subject Template:**
        - Repeat the process to create an email subject template.
        - Label it as StuRegistrationEmailTextTempSub.
10. **Add Action Element to Send Email**
    - **Add Send Email Action:**
        - Add an Action element after each Create Records element and label it as Send Email to Student.
    - **Configure the Action:**
        - Body: {!StuRegistrationEmailTextTempBody}
        - Recipient Address List: {!StudentRecordRes.Email__c}
        - Subject: {!StuRegistrationEmailTextTempSub}
11. **Add Success Screen**
    - **Add Final Screen Element:**
        - Drag a Screen element after the Send Email to Student action and label it as Success Screen.
    - **Add Display Text Component:**
        - Add a Display Text component from the left panel and label it as SuccessMessage.
12. **Save and Activate the Flow**

- **Save the Flow:**
  - Name the flow EduConsultPro Student Flow.
- **Activate the Flow:**
  - Click Activate to make the flow available for use.

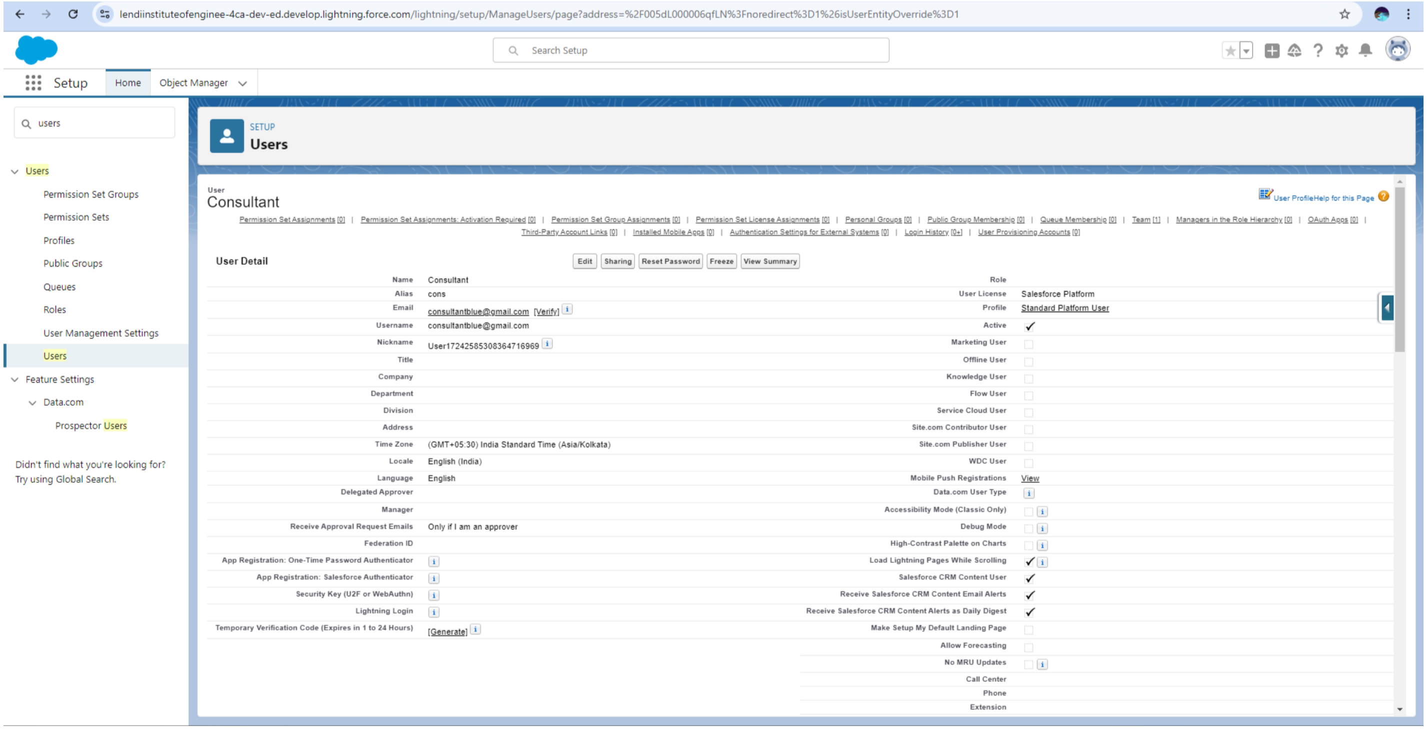


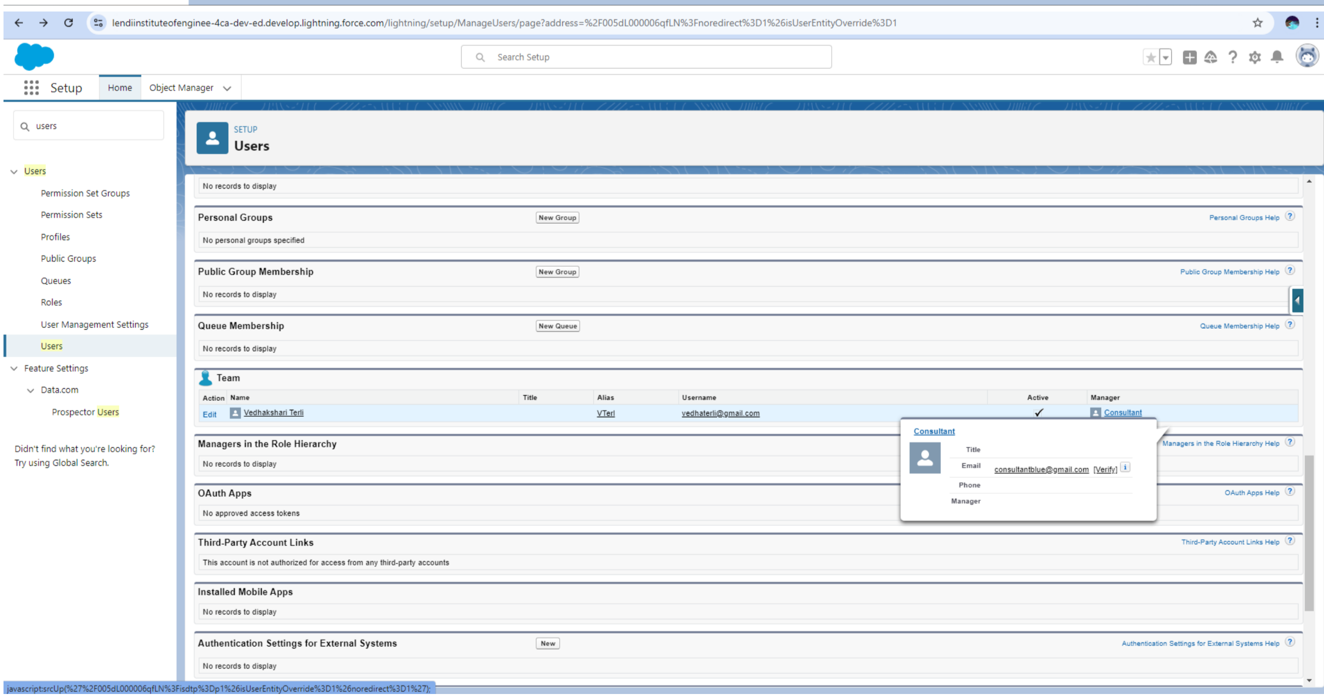
Task 3: Creating a New User in Salesforce

- **Create a User with a Standard Platform User Profile**
- 1.1 **Access User Setup:**
  - Navigate to Setup in Salesforce.
  - Go to Administration → Users → Users.
  - Click on New User.
- 1.2 **Create User:**
  - Last Name: Enter "Consultant."
  - License: Select Salesforce Platform.
  - Profile: Select Standard Platform User.
  - Fill in all mandatory fields.
  - Click Save to create the user.
- **Configure the User Settings**
- 2.1 **Edit User Settings:**
  - Return to Setup → Administration → Users.
  - Find the newly created user "Consultant" and click Edit next to their name.

2.2 **Configure Approver Settings:**

  - Scroll down to the bottom of the page to Approver Settings.
  - In the Manager field, select "Consultant."
  - Click Save to apply the changes.





Task 4: Creating an Approval Process for the Property Object

Create an Email Template

1.1 **Access Lightning Email Templates:**

- From Setup, enter "Templates" in the Quick Find box.
- Select Lightning Email Templates and toggle it on.

1.2 **Create a New Folder for Email Templates:**

- Go to the Email Templates tab and click on New Folder.
- Name the folder Approval Templates and grant access to the folder as required.

1.3 **Create Approval and Rejection Templates:**

- Go back to the Email Templates tab and click New Email Template.
- Select the Approval Templates folder and create the following templates:
  - Approval Request: For sending approval requests.
  - Approval Notification: For notifying when a record is approved.
  - Rejection Notification: For notifying when a record is rejected.

1.4 **Create an Appointment Approval Template:**

- Return to the Approval Templates folder.
- Click on New Email Template to create an Appointment Approval template with fields to show key appointment details.

Create a New Approval Process

2.1 **Access Approval Processes:**

- From Setup, search for "Approval Processes" in the Quick Find box.
- Select Approval Processes and click New Approval Process.

2.2 **Setup Approval Process for Appointments:**

- Select Appointment as the object.
- Choose Jump Start Wizard for a quick setup or Standard Setup Wizard for more customization.

2.3 **Configure Entry Criteria:**

- Define the criteria that must be met for a record to enter the approval process.

2.4 **Add Approval Steps:**

- Specify the approver(s) for each step, using the Consultant role for the initial approval.

2.5 **Specify Final Approval Actions:**

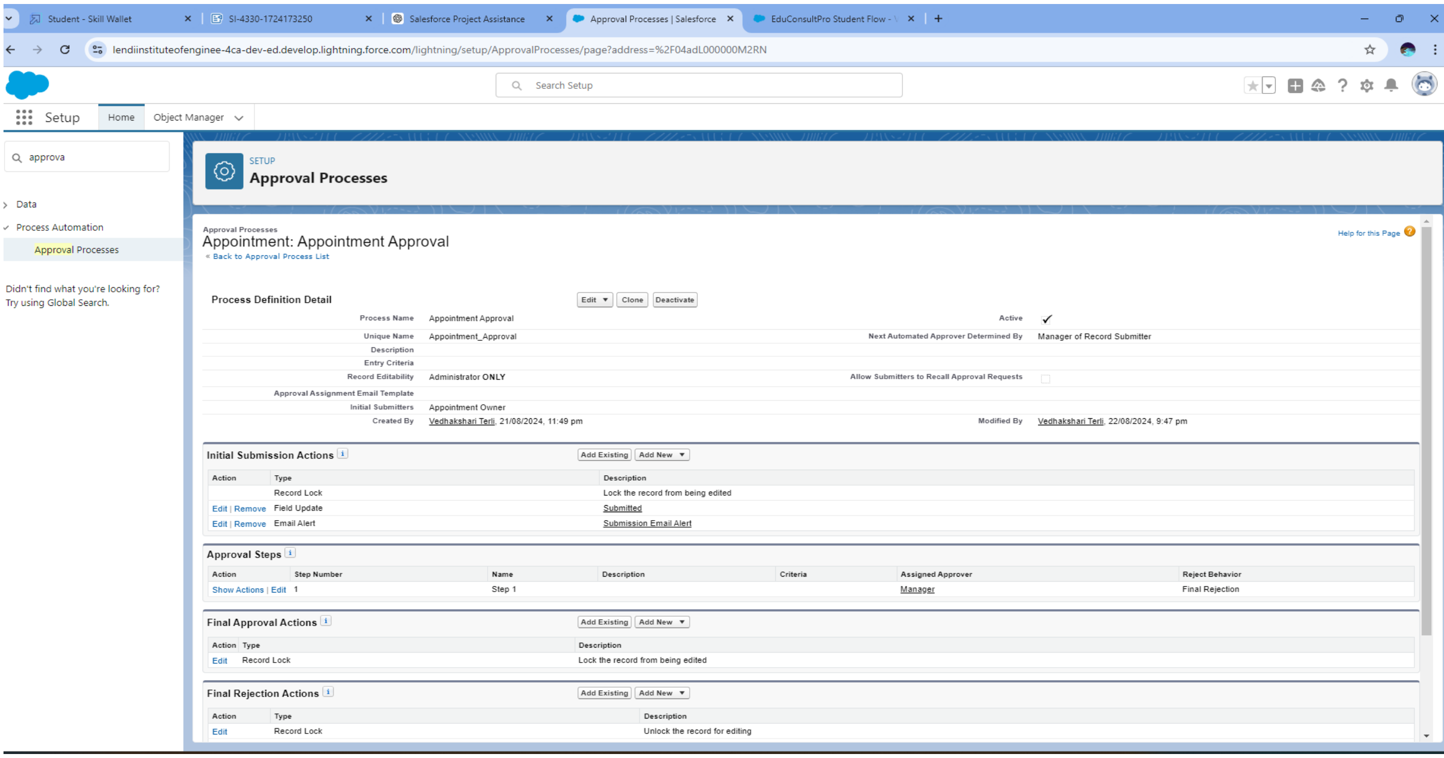
- Choose actions to be taken when an appointment is approved, such as updating the status field or sending an email notification.

2.6 **Specify Rejection Actions:**

- Choose actions to be taken when an appointment is rejected, such as sending a rejection email notification and updating the status field.

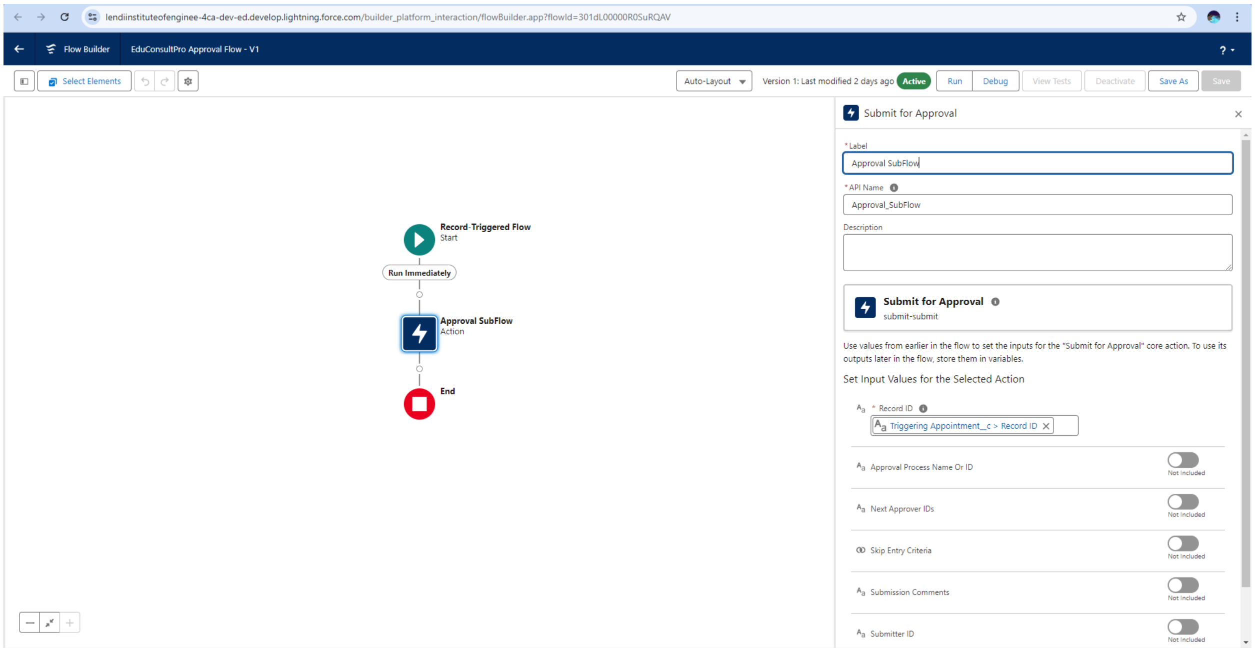
2.7 **Activate the Approval Process:**

- Once all steps are configured, activate the approval process.



Task 5: Creating a Lightning App Page

- **Create a Lightning App Page**
- 1.1 **Access App Builder:**
  - In Setup, search for Lightning App Builder.
  - Click on New Page and select App Page.
- 1.2 **Name the Page:**
  - Name the page "Appointment Management."
- **Configure the App Page**
- 2.1 **Add Components to the Page:**
  - Drag and drop the necessary components:
    - List View: Display a list of appointments.
    - Record Detail: Show details of a selected appointment.
    - Report Chart: Add a chart showing key appointment metrics.
- 2.2 **Customize the Page Layout:**
  - Arrange the components on the page to ensure a clean and user-friendly layout.
- **Activate the Lightning App Page**
- 3.1 **Assign the Page to Profiles:**
  - During activation, select the profiles that should have access to this page.
  - Consider setting this page as the default home page for the selected profiles.
- **Save and Review the Page:**
  - Save the page and review it to ensure everything is correctly configured.



Task-6: Develop a Screen Flow for Existing Students to Schedule an Appointment

1.1 **Add Initial Screen Element**

- **Access Flow Builder:**
  - Navigate to Setup and enter "Flow Builder" in the Quick Find box.
  - Select "New Flow" and choose "Screen Flow."
- **Configure the Screen Element:**
  - Add a Screen element.
  - In the Screen Properties pane, label it as "Capture Student Info."
  - Add two Text components:
    - **1st Text Component Label:** "Student Name"
    - **2nd Text Component Label:** "Student Email"
  - Click "Done."

1.2 **Add GET Record Element for Student**

- **Create a GET Record Element:**
  - Insert a GET Record element after the Screen element and label it "Fetch Student Record."
  - **Object:** Select "Student."
  - **Conditions:**
    - **Field:** "Student Name"
      - **Operator:** Equals
      - **Value:** {!Enter_Student_Name}
    - **Field:** "Email__c"
      - **Operator:** Equals
      - **Value:** {!Enter_Student_Email}
  - Click "Done."

1.3 **Add Decision Element for Appointment or Case**

- **Create a Decision Element:**
    - Place a Decision element after the student record fetch and label it "Choose Appointment or Case."
    - **Outcome 1 - Appointment:**
        - **Condition:**
            - **Resource:** {!How_may_I_Help_you}
            - **Operator:** Equals
            - **Value:** {!Book_an_Appointment}
    - **Outcome 2 - Case:** Repeat the above steps for the Case condition.
    - Click "Done."

1.4 **Add Screen Element for Appointment Details**

- **Configure the Appointment Screen:**
    - Add a Screen element on the Appointment path after the Decision element and label it "Appointment Details Screen."
    - Create a new resource (AppointmentRecordRes) to display all relevant fields from the Appointment object.
    - Drag the necessary fields to the screen for capturing appointment information.
    - Click "Done."

1.5 **Fetch Consultant Record**

- **Add GET Record Element for Consultant:**
    - Insert a GET Record element after the appointment screen and label it "Fetch Consultant Record."
    - **Object:** Select "Consultant."
    - **Condition:**
        - **Field:** "Name"
            - **Operator:** Equals
            - **Value:** {!AppointmentRecordRes.Consultant_Name__c}
    - Click "Done."

1.6 **Create Appointment Record**

- **Add Create Records Element:**
    - After fetching the consultant record, add a Create Records element labeled "Create Appointment."
    - **Number of Records:** One
    - **Set Fields:** Use separate resources and literal values.
    - **Object:** Select "Appointment" and map fields accordingly.
    - Click "Done."

1.7 **Add Confirmation Screen Element**

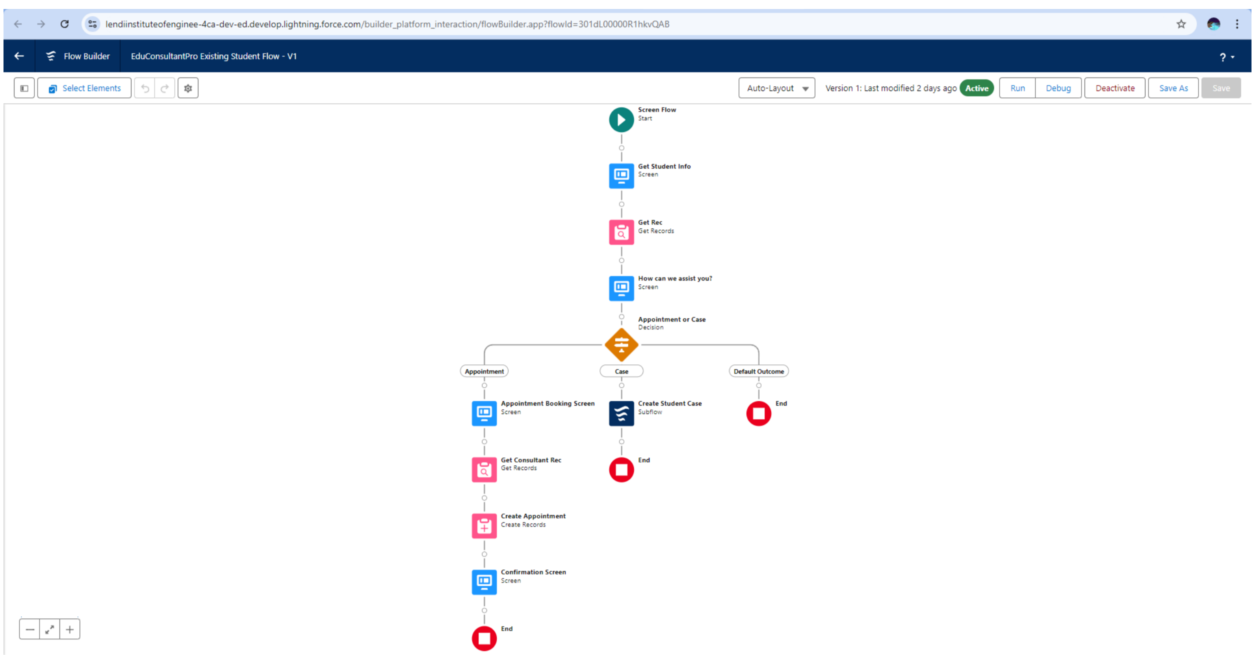
- **Configure the Confirmation Screen:**
  - Add a Screen element following the appointment creation and label it "Appointment Confirmation."
  - Drag the Display Text component into the main panel and label it "Appointment_Confirmation."
  - Add the relevant content using the Resource Picker Box.
  - Click "Done."

1.8 **Add SubFlow Element for Case Creation**

- **Configure the Case SubFlow:**
  - Insert a SubFlow element after the Decision element on the Case path.
  - Select the "Create a Case" flow and label it "Create Student Case."
  - Click "Done."

1.9 **Save and Activate the Flow**

- **Save the Flow:**
  - Label the flow as "EduConsultantPro Existing Student Flow."
  - Click "Save."
- **Activate the Flow:**
  - Click "Activate" to make the flow live.



Task-7: Create a Comprehensive Screen Flow Combining All Existing Flows

1.1 **Add Welcome Screen**

- **Configure the Welcome Screen:**
  - Add a Screen element and label it "Welcome."

        - Drag the Display Text component into the panel and label it "WelcomeMessage."
        - Add the welcome text in the Resource Picker Box.
        - Click "Done."

1.2 **Add Confirmation Screen for Student Type**

- **Student Type Confirmation Screen:**
    - Insert a Screen element after the Welcome Screen and label it "Student Type Confirmation."
    - Add a Radio Buttons component labeled "Existing Student."
    - **Choices:**
        - **Yes:** Create a "Yes" choice.
        - **No:** Create a "No" choice.
    - Click "Done."

1.3 **Add Decision Element for Student Type**

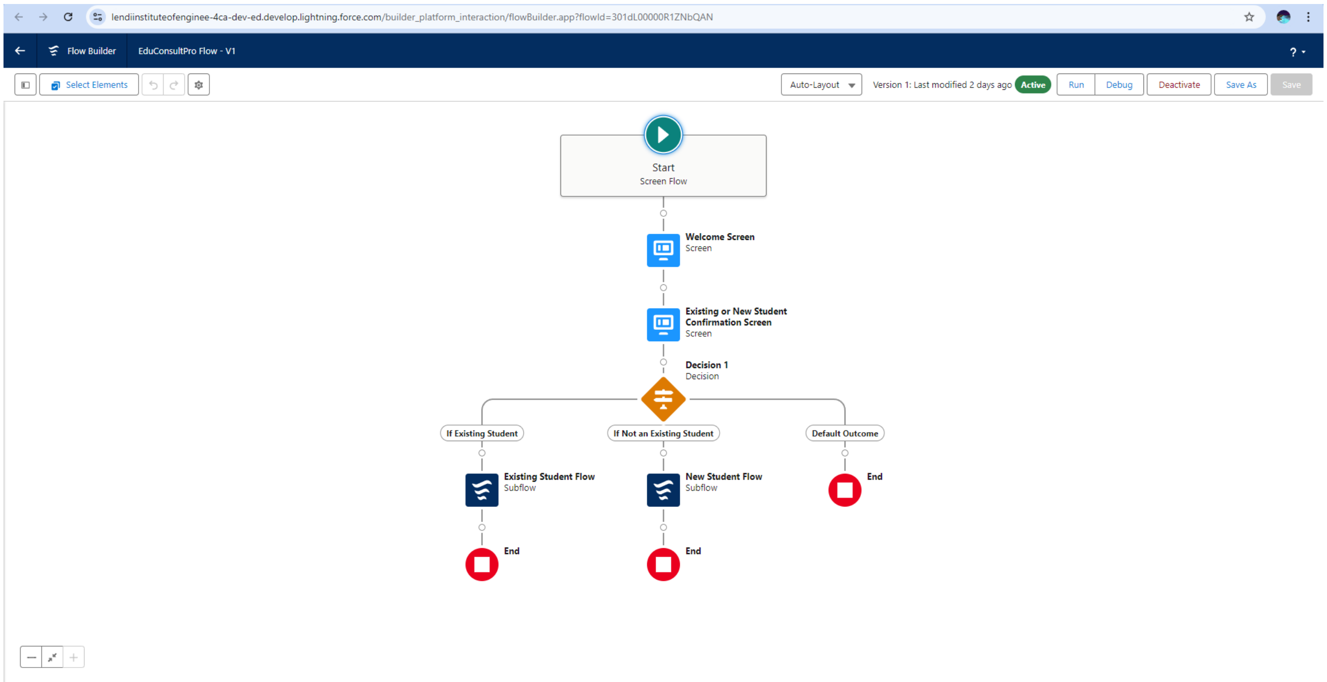
- **Configure the Decision Element:**
    - Add a Decision element after the Confirmation Screen and label it "Student Type Decision."
    - **Outcome 1 - Existing Student:**
        - **Condition:**
            - **Resource:** {!Existing_Student}
            - **Operator:** Equals
            - **Value:** "Yes"
    - **Outcome 2 - New Student:** Repeat the steps for the "No" choice.
    - Click "Done."

1.4 **Add SubFlow Elements for Existing and New Students**

- **Configure SubFlows:**
    - **For Existing Students:**
        - Insert a SubFlow element on the "Yes" path, search for "EduConsultantPro Existing Student Flow," and label it "Existing Student Flow."
    - **For New Students:**
        - Insert a SubFlow element on the "No" path, search for "EduConsultantPro Student Flow," and label it "New Student Flow."
    - Click "Done."

1.5 **Save and Activate the Flow**

- **Save the Flow:**
    - Label the flow as "EduConsultPro Combined Flow."
    - Click "Save."
- **Activate the Flow:**
    - Click "Activate" to make the flow live.



Task-8: Develop and Assign a Lightning App Page

1.1 **Create the Lightning App Page**

- **Access the Lightning App Builder:**
  - From Setup, search for "App Builder" in the Quick Find box.
  - Click on "Lightning App Builder."
- **Start Creating a New Page:**
  - Click "New."
  - Select "Home Page" and click "Next."
- **Configure the Page:**
  - **Page Name:** Enter "EduConsultPro Home Page."
  - **Template:** Select the Standard Home Page template.
  - Click "Done."
- **Add the Flow Component:**
  - Drag the Flow component into the top-right region of the page.
  - **Search for Flow:** Look for "EduConsultantPro Flow" and select it.
  - Click "Save."

1.2 **Activate and Assign the Lightning App Page**

- **Activate the Page:**
  - Click "Activate."
- **Assign Page to Apps and Profiles:**
  - **App Assignment:**
    - Choose the Sales app and click "Next."
  - **Profile Assignment:**

- Select "System Administrator" and click "Next."

- **Review and Save:**
  - Review the details and click "Save."