A CRM Application to Manage the Services offered by an Institution

BY

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Project Abstract

EduConsultPro Institute is a leading educational institution offering a variety of courses and programsin diverse fields. With a growing number of prospective students seeking admission each year,the institute faceschallenges in managingthe admission process, student enquiries, and expert consulting services efficiently. To address these challenges, EduConsultPro Institute decidesto leverage Salesforce CRM to streamline the admission process and enhance the overallexperience for both students and admissions staff.
The use case focuseson the admission process for prospective studentsinterested in enrolling in courses and programs offered by EduConsultPro Institute. The goal is to provide a seamless and transparent experience for students whileenabling admissions staff to review efficiently and process admission applications, student enquiries, and case management.

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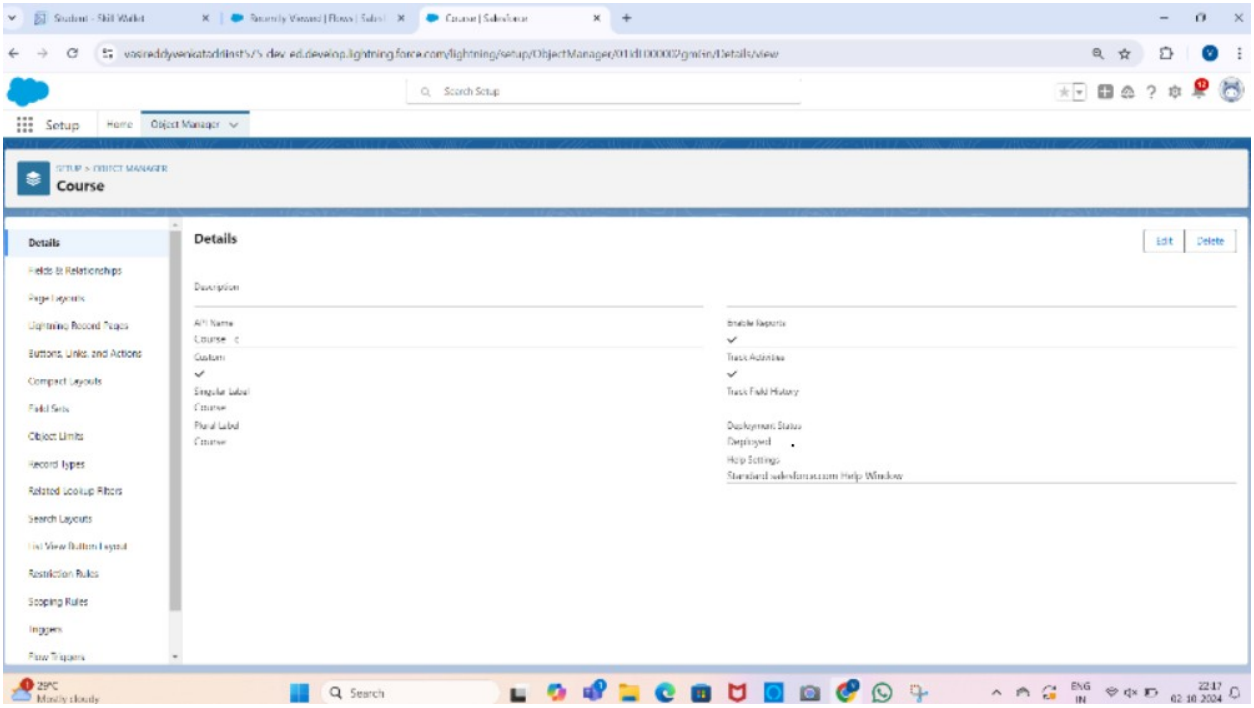
INTRODUCTION

Task 1:

Create Objects from Spreadsheet

Create Course object



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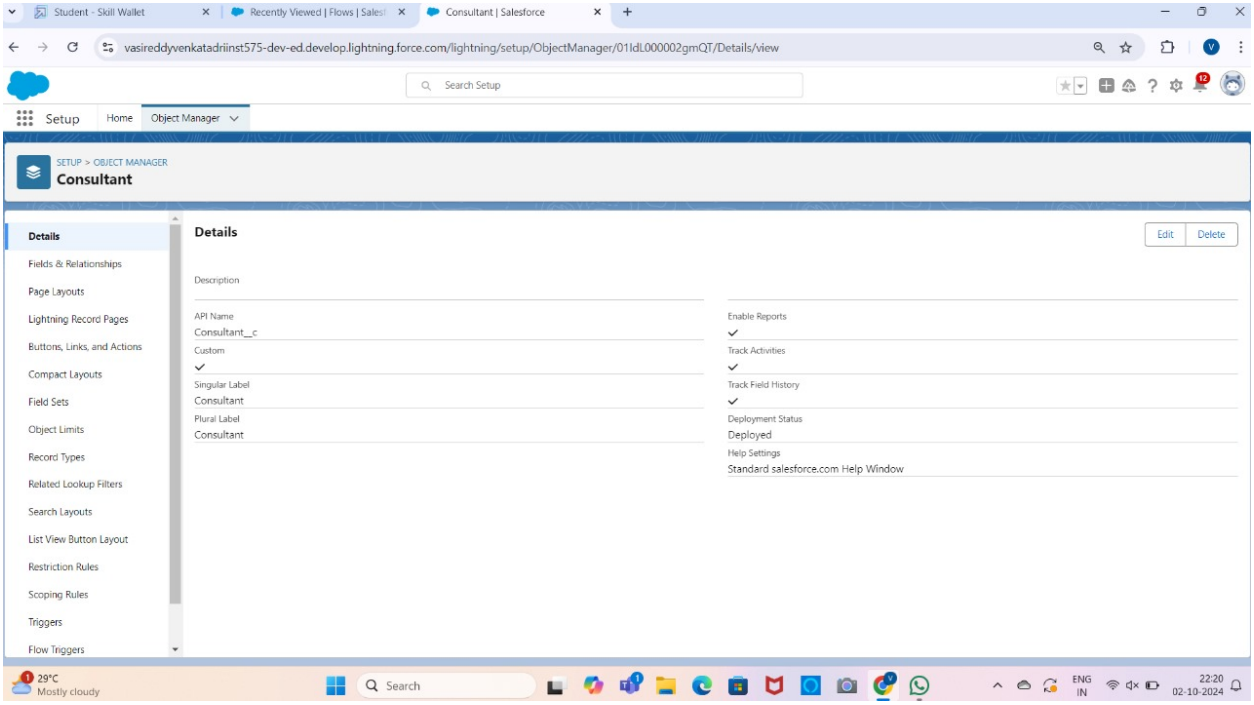
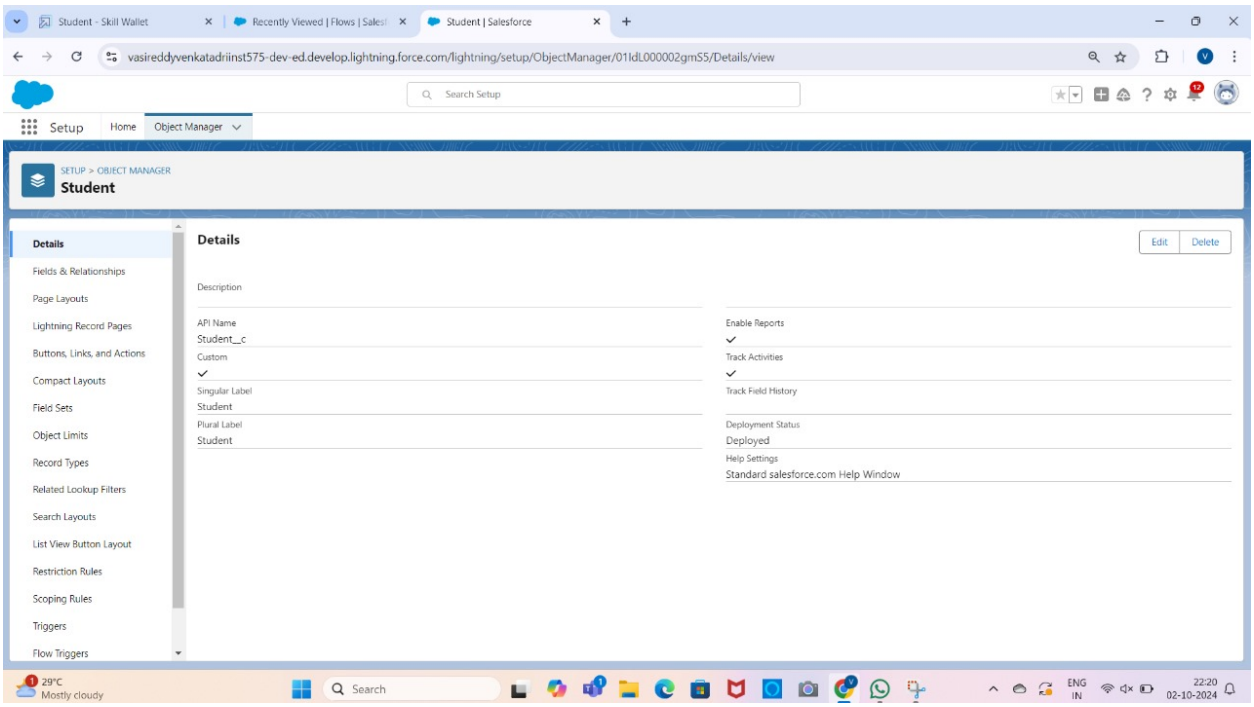
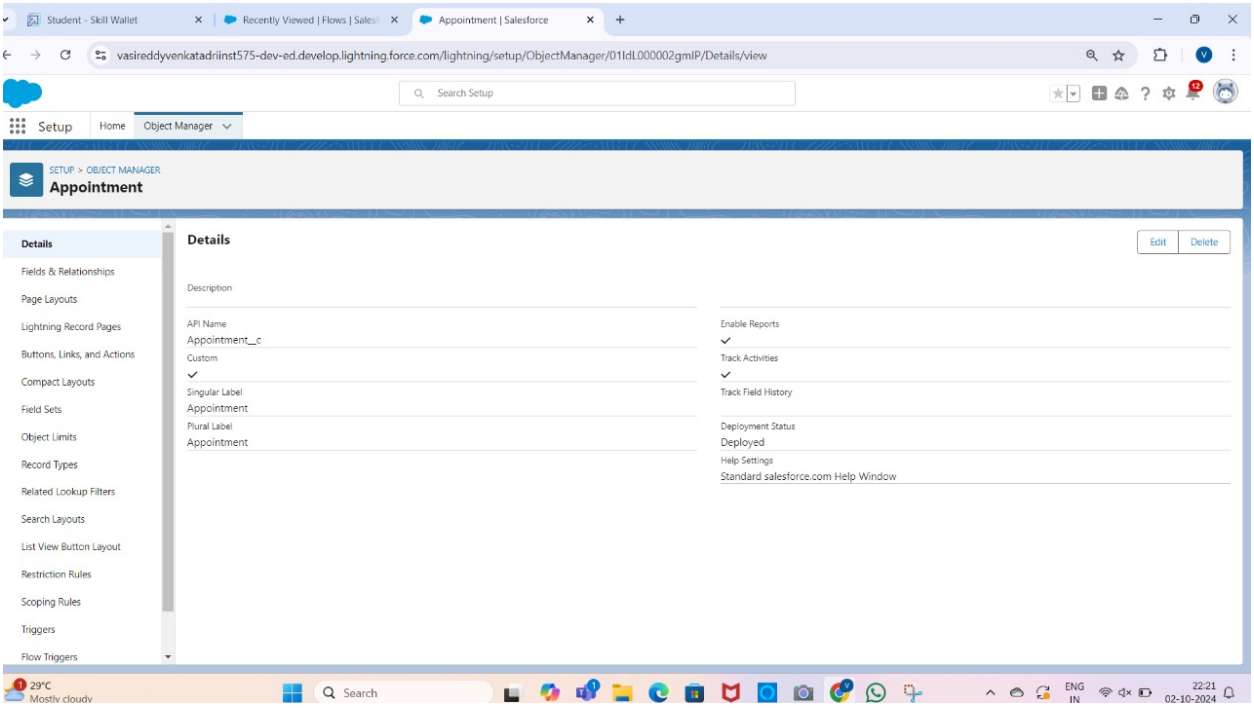
Create Remainingobjects

1. Follow the steps which we have followed for course object creation.
2. Use the following sheets for remaining objects.
    a. Consultant
    b. Student
    c. Appointment




Student - Skill Wallet
Recently Viewed | Flows | Salesf
Student | Salesforce
vasireddyvenkatadriinst575-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000002gmS5/Details/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Details
Edit
Delete
Description
API Name
Student__c
Custom
Singular Label
Student
Plural Label
Student
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
29°C
Mostly cloudy
Search
ENG
IN
22:20
02-10-2024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Recently Viewed | Flows | Salesf
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vasireddyvenkatadriinst575-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000002gmIP/Details/view
Search Setup
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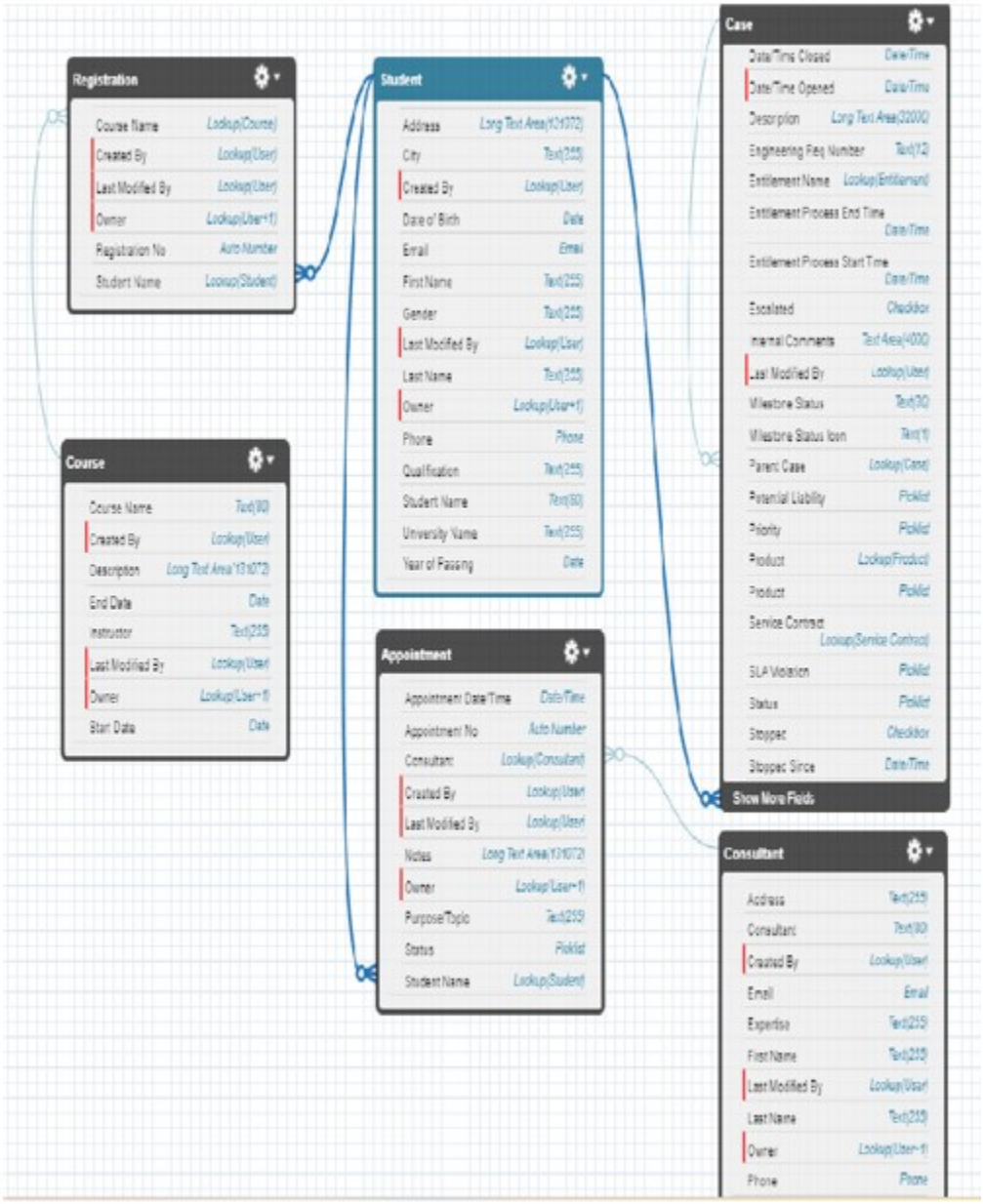
22:21
02-10-2024

Create Relationship among the objects

1. Create a lookup betweenappointment and student,appointment and consultant.
2. Create an object to store the information student and course details with the name Registration.
3. Also create a lookup between student and case to store the student queries for immigration or visa application.

4.The data model should be similar to the below Data Model with fields &relationships

5.Create tabs for the respective object.


Registration
Course Name Lookup(Course)
Created By Lookup(User)
Last Modified By Lookup(User)
Owner Lookup(User+1)
Registration No Auto Number
Student Name Lookup(Student)
Student
Address Long Text Area(131072)
City Text(255)
Created By Lookup(User)
Date of Birth Date
Email Email
First Name Text(255)
Gender Text(255)
Last Modified By Lookup(User)
Last Name Text(255)
Owner Lookup(User+1)
Phone Phone
Qualification Text(255)
Student Name Text(80)
University Name Text(255)
Year of Passing Date
Case
Date/Time Closed Date/Time
Date/Time Opened Date/Time
Description Long Text Area(32000)
Engineering Req Number Text(12)
Entitlement Name Lookup(Entitlement)
Entitlement Process End Time Date/Time
Entitlement Process Start Time Date/Time
Escalated Checkbox
Internal Comments Text Area(4000)
Last Modified By Lookup(User)
Milestone Status Text(30)
Milestone Status Icon Text(1)
Parent Case Lookup(Case)
Potential Liability Picklist
Priority Picklist
Product Lookup(Product)
Product Picklist
Service Contract Lookup(Service Contract)
SLA Violation Picklist
Status Picklist
Stopped Checkbox
Stopped Since Date/Time
Show More Fields
Course
Course Name Text(80)
Created By Lookup(User)
Description Long Text Area(131072)
End Date Date
Instructor Text(255)
Last Modified By Lookup(User)
Owner Lookup(User+1)
Start Date Date
Appointment
Appointment Date/Time Date/Time
Appointment No Auto Number
Consultant Lookup(Consultant)
Created By Lookup(User)
Last Modified By Lookup(User)
Notes Long Text Area(131072)
Owner Lookup(User+1)
Purpose/Topic Text(255)
Status Picklist
Student Name Lookup(Student)
Consultant
Address Text(255)
Consultant Text(30)
Created By Lookup(User)
Email Email
Expertise Text(255)
First Name Text(255)
Last Modified By Lookup(User)
Last Name Text(255)
Owner Lookup(User+1)
Phone Phone

ıips:

Configure the Case Object

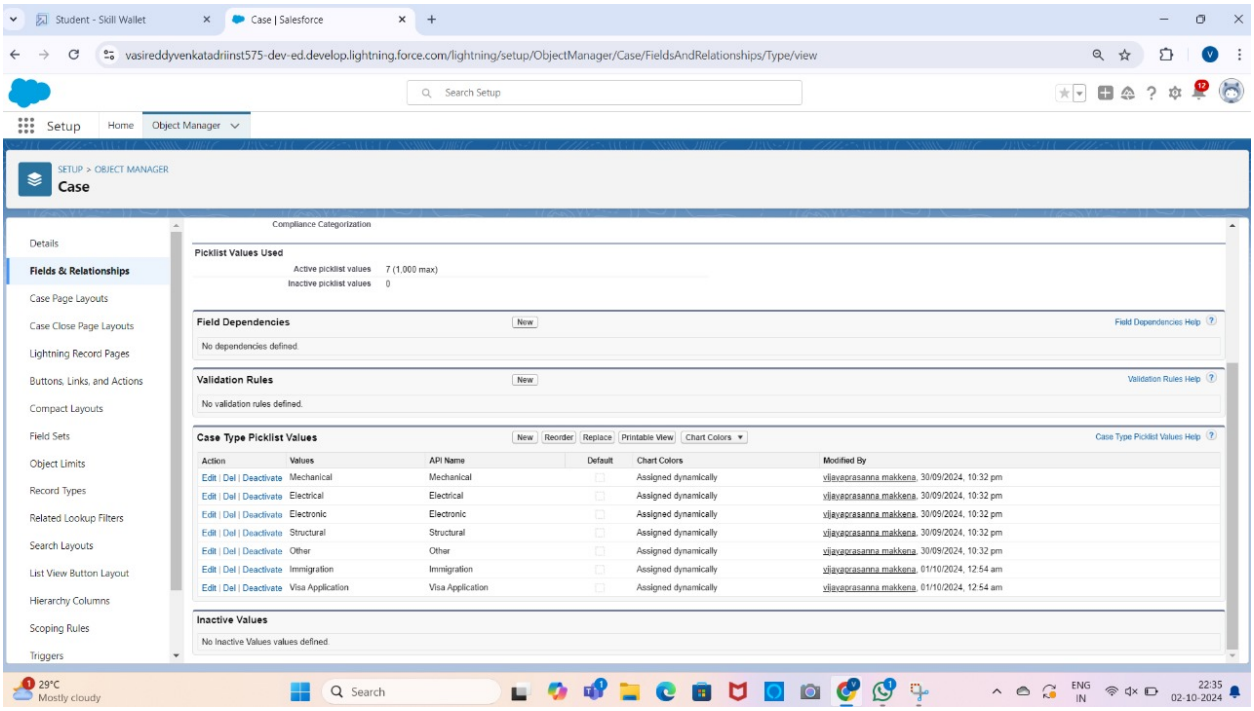
1. Go to the object manager,edit the case object.
2. Select the “Type”field and add the valuesin it.

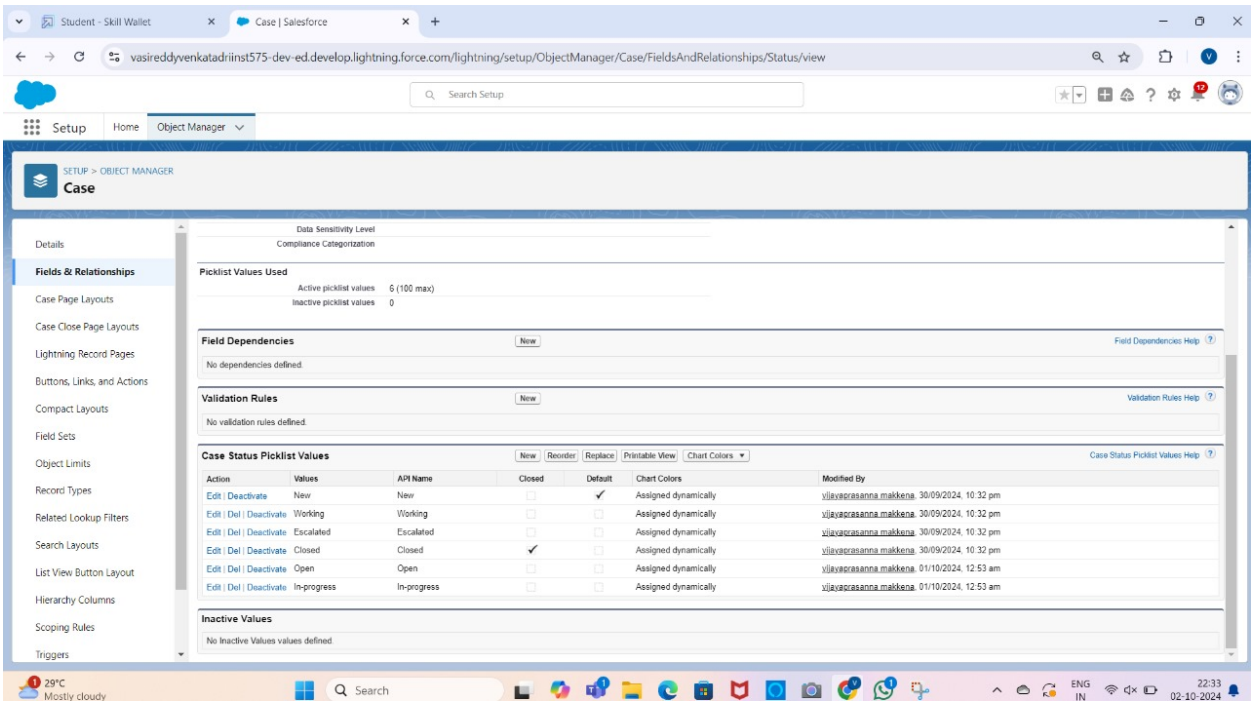
   Immigration

   Visa Application
3. Now Select the “Status” field and add the values in it.

   Open

   In-progress

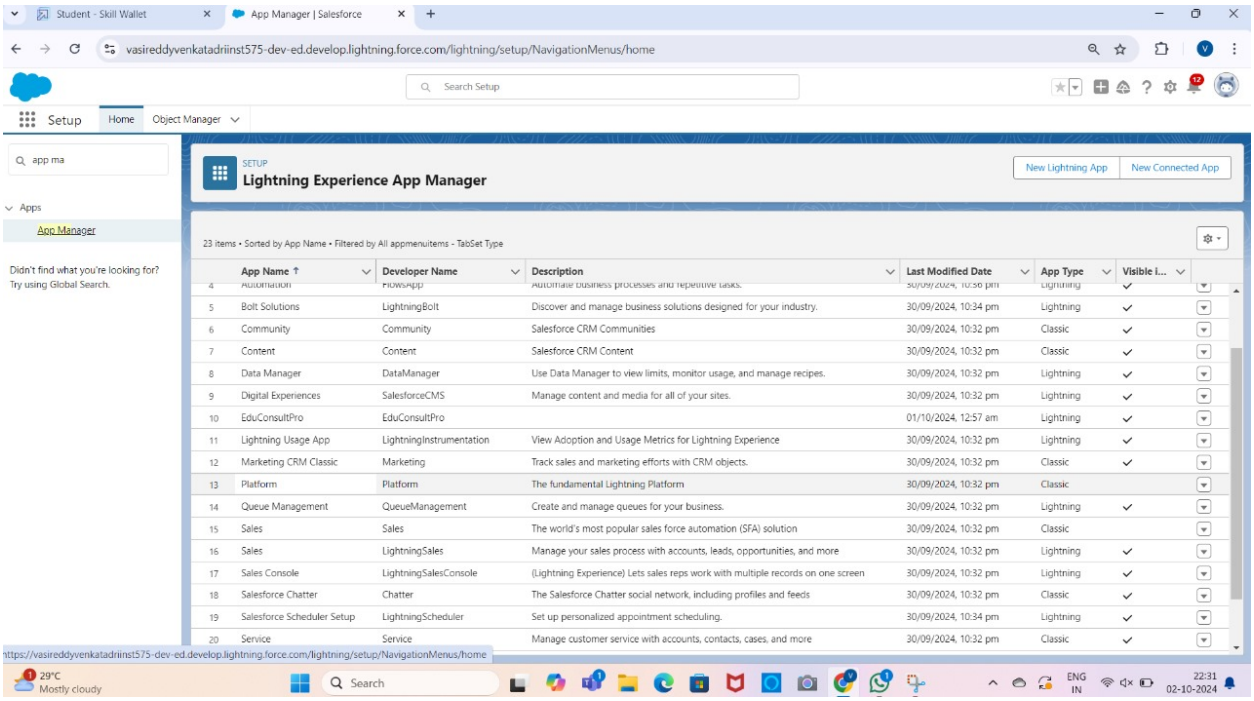




Create a Lightning App

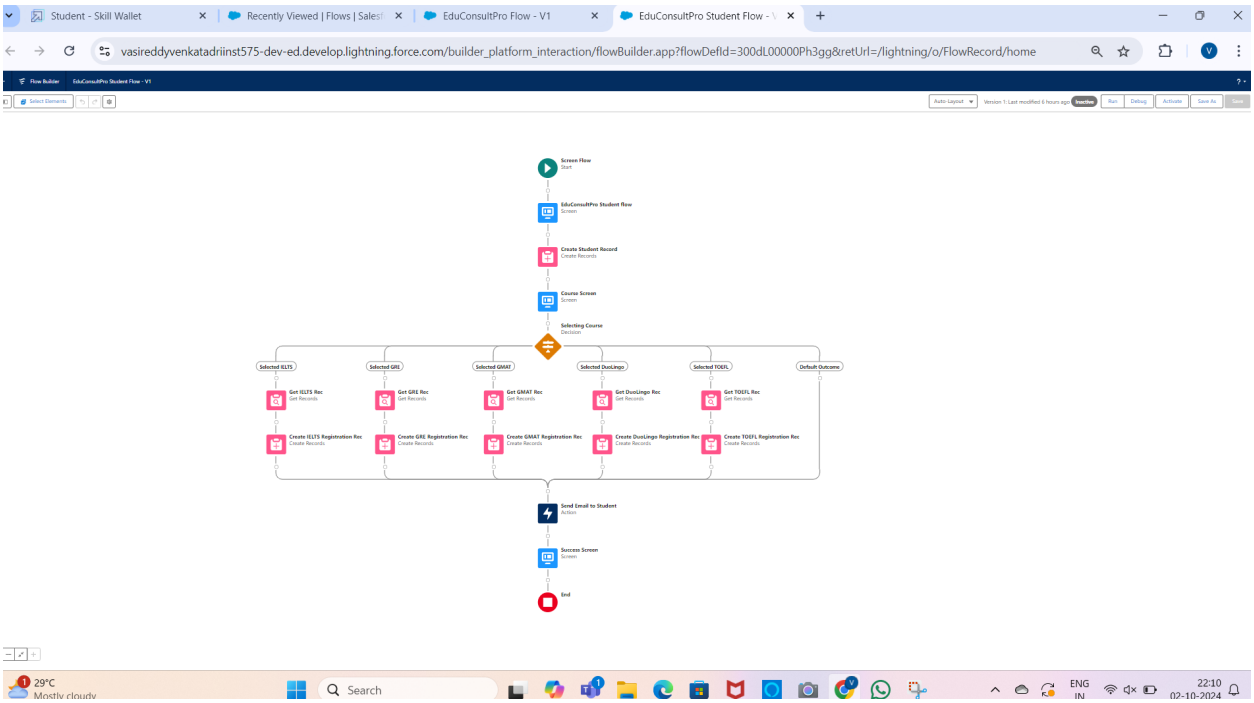
1. Goto Setup, search for the App Managerin quick find
2. Click on New LightningApp
3. Give app name as “EduConsultPro”, click Next, Next, Next
4. Add Home, Students, Courses,Consultants, Appointments, Registrations, and

   Cases from the AvailableItems to Selected Items.
5. Add the “SystemAdministrator” profile from Available Profilesto Selected Profiles, click Save &Finish.



Task 2:

Create a ScreenFlow for Student Admission Application process.



Task 3:

Create Users

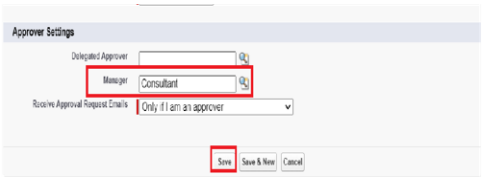
Create a user with a Standard platformuser profile.

User

1. Go to Setup -->Administration --> Users --> New User
2. LastName : Consultant
3. License : Salesforce Platform
4. Profile : Standard PlatformUser
5. Fill all the mandatory fields& Save.

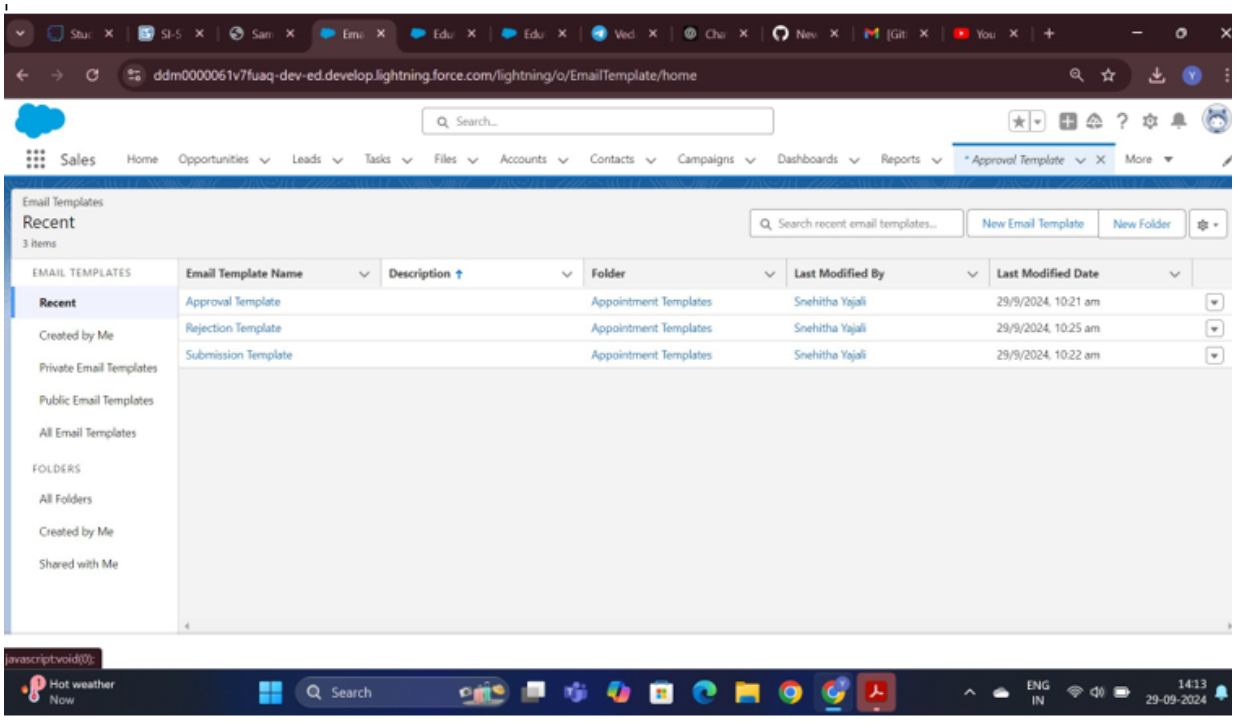
Configure the User Settings

1. Go to Setup -->Administration --> Users --> click Edit next to your name
2. Scroll down to the bottom, under Approver Settings, Select “Consultant” the Manager Field.
3. ClickSave.



Task 4:

Create an Approval Process for Property Object



Task 5:

Create a Record Triggered Flow

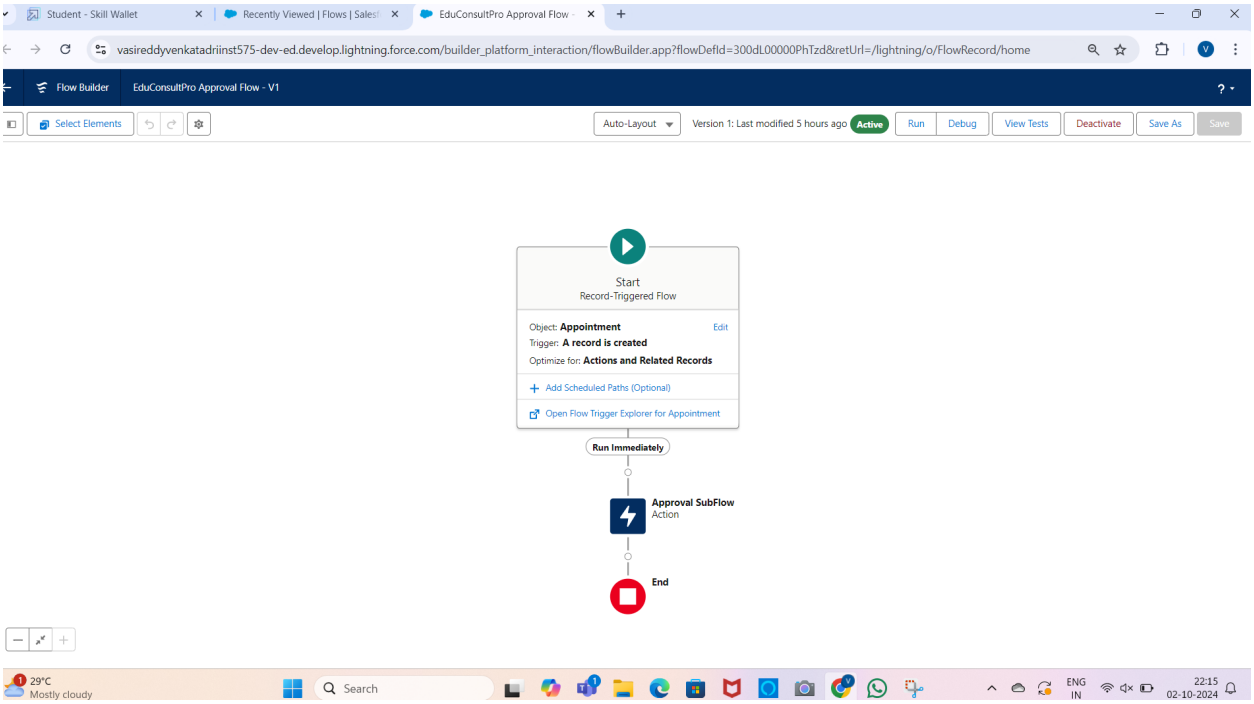
Configure the Start Element

1. From Setup, enter Flows in the Quick Find box, then selectFlows.
2. ClickNew Flow.
3. Select Record-Triggered Flow.
4. Click Create. The ConfigureStart window opens.
5. ForObject, select Appointment.
6. For Trigger the Flow When, select A record is created.

Addan Action Element

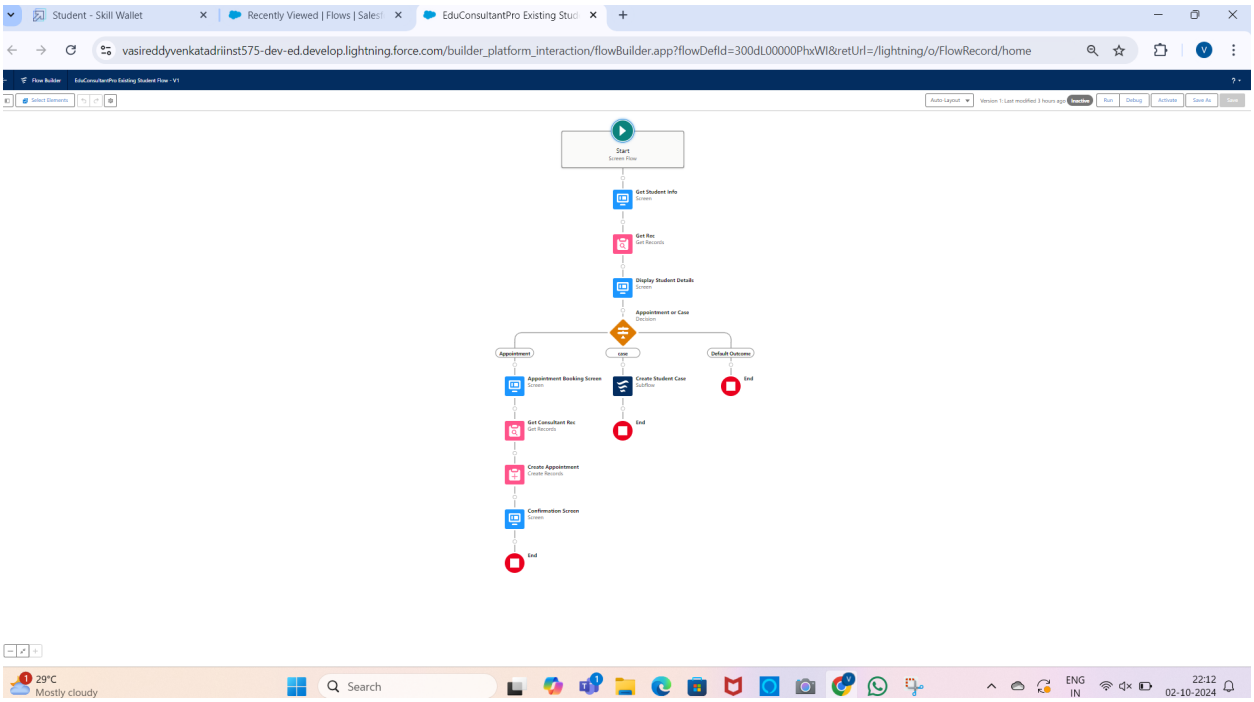
1. Add an Action element after the Start Element and Select the Submit for approval action, label it as “Approval SubFlow”.

2.Set the RecordIdto “{!$Record.Id}”.



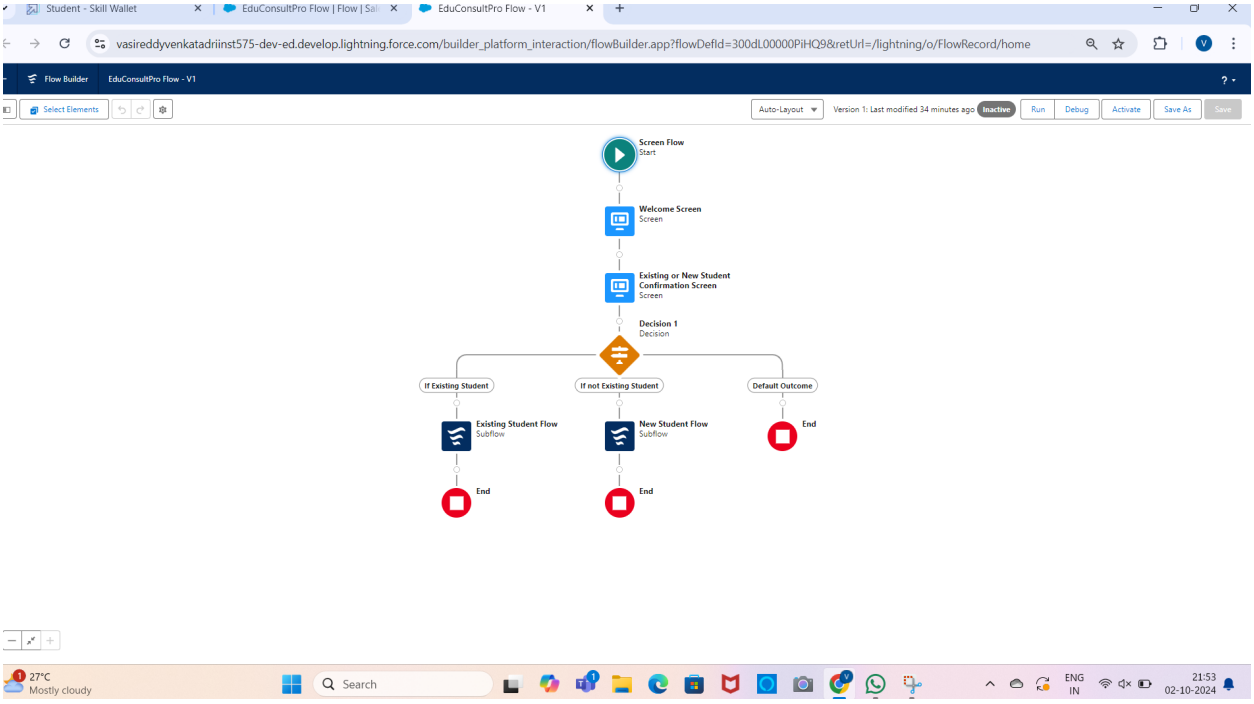
Task 6:

Create a ScreenFlow for Existing Student to Book an Appointment



Task 7:

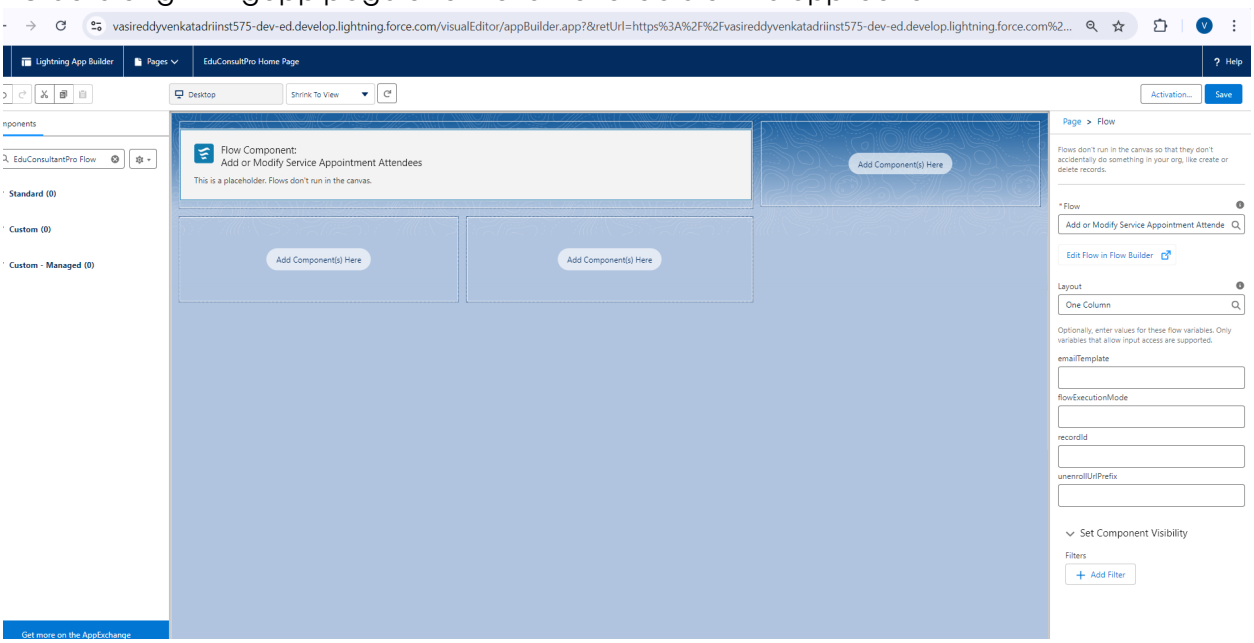
Create a ScreenFlow to Combine all the flows at one place



Task 8:

Create a lightning app page

Create a lightningapp page and make it available at the application



THANK YOU