A CRM APPLICATION TO MANAGE THE SERVICES OFFERED BY INSTITUTION

By

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PROJECT ABSTRACT

EduConsultPro Institute, a leading educational institution, is implementing a Salesforce CRM solution to streamline its admissions process, manage student inquiries, and enhance consulting services. With a growing number of prospective students, the institute faces challenges in efficiently handling applications, responding to inquiries, and providing expert guidance. The CRM system will provide admissions staff with tools to track and process applications smoothly, ensuring transparency and timely communication with students. It will also include case management features to categorize and resolve inquiries effectively, enhancing response times and student satisfaction. Additionally, the system will support consulting services by assigning expert consultants to students based on their needs and tracking outcomes to improve guidance quality. Through automated workflows and a centralized platform, EduConsultPro aims to enhance operational efficiency and deliver a seamless, responsive experience, positioning itself as a forward-thinking educational provider.

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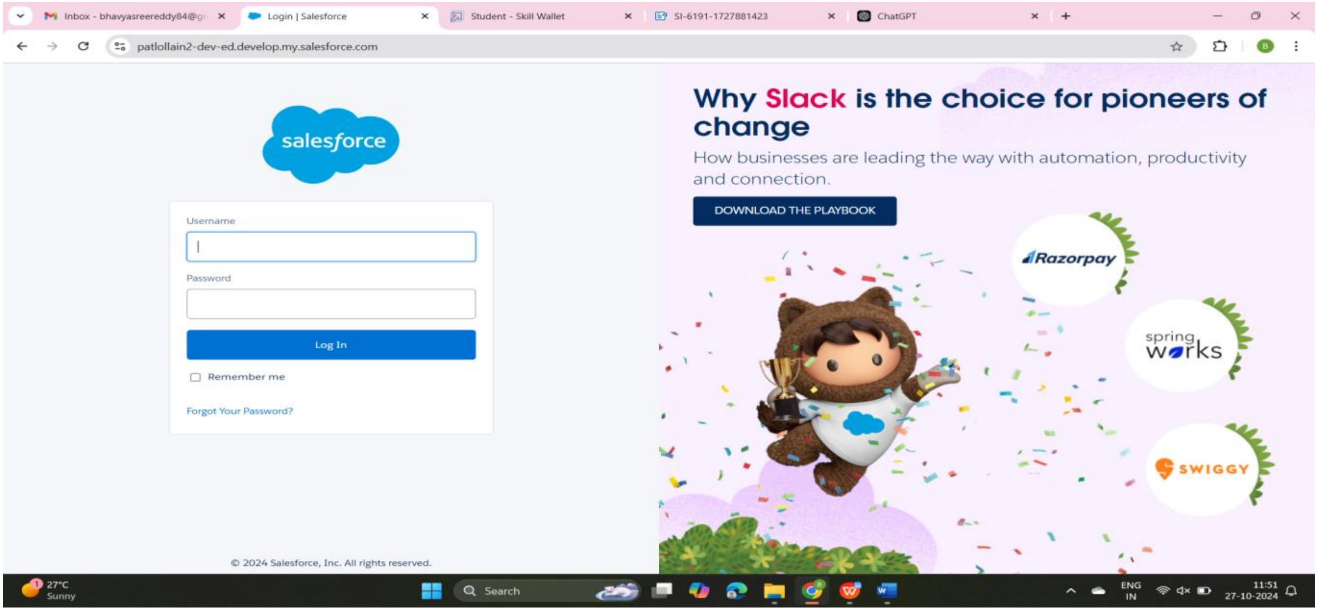
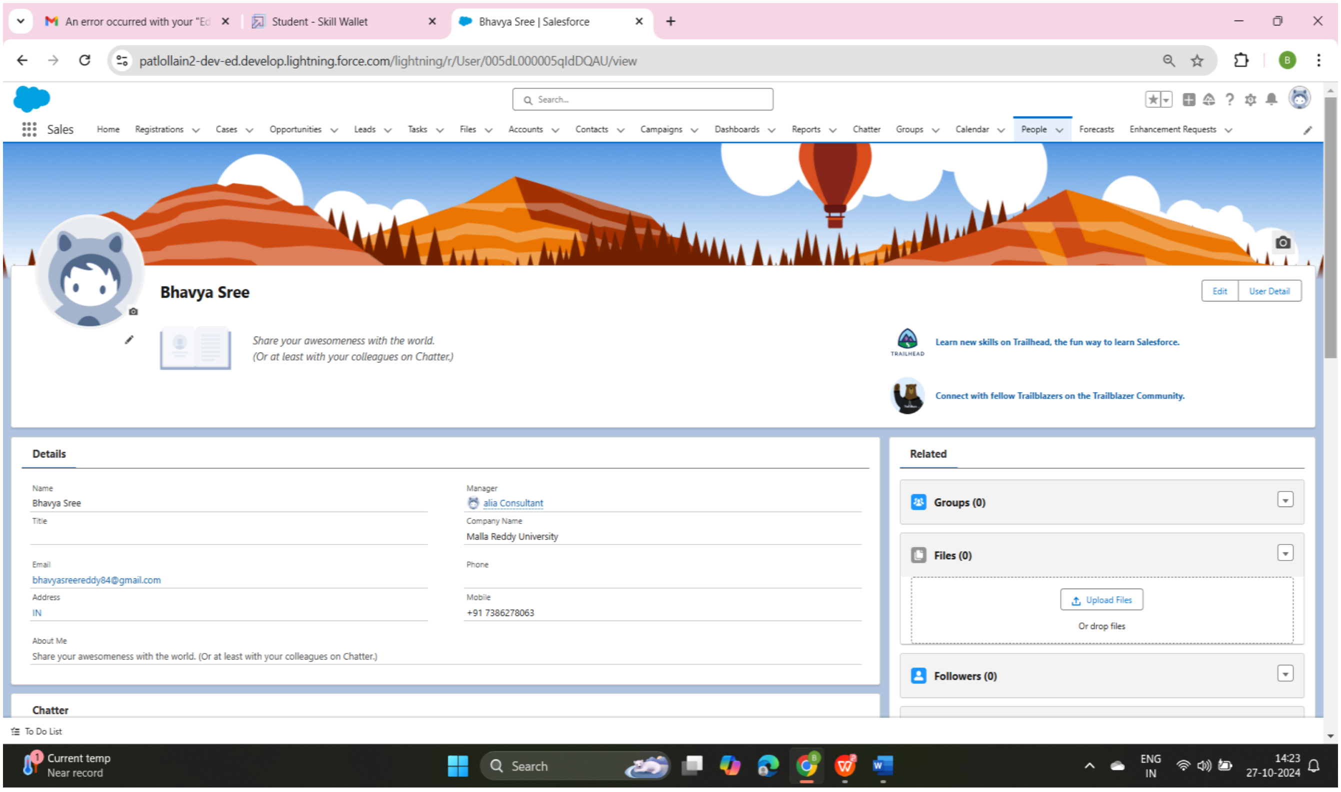
TASK 1: SALES FORCE ACCOUNT CREATION

1. Go to - https://developer.salesforce.com/signup .
2. On the signup form, enter the required details.
3. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.

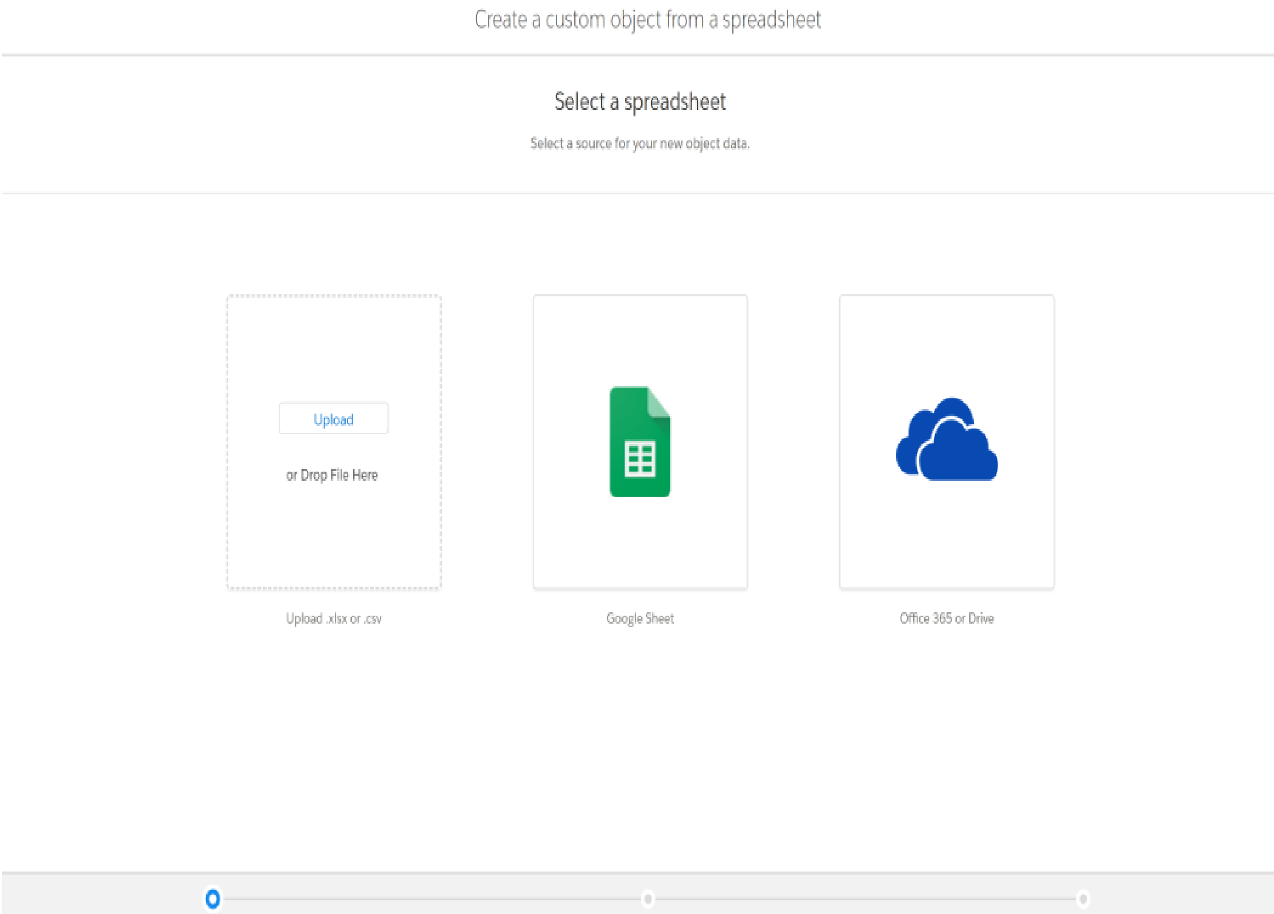




TASK 2: CREATE OBJECTS FROM SPREADSHEET

a) Create Course Object

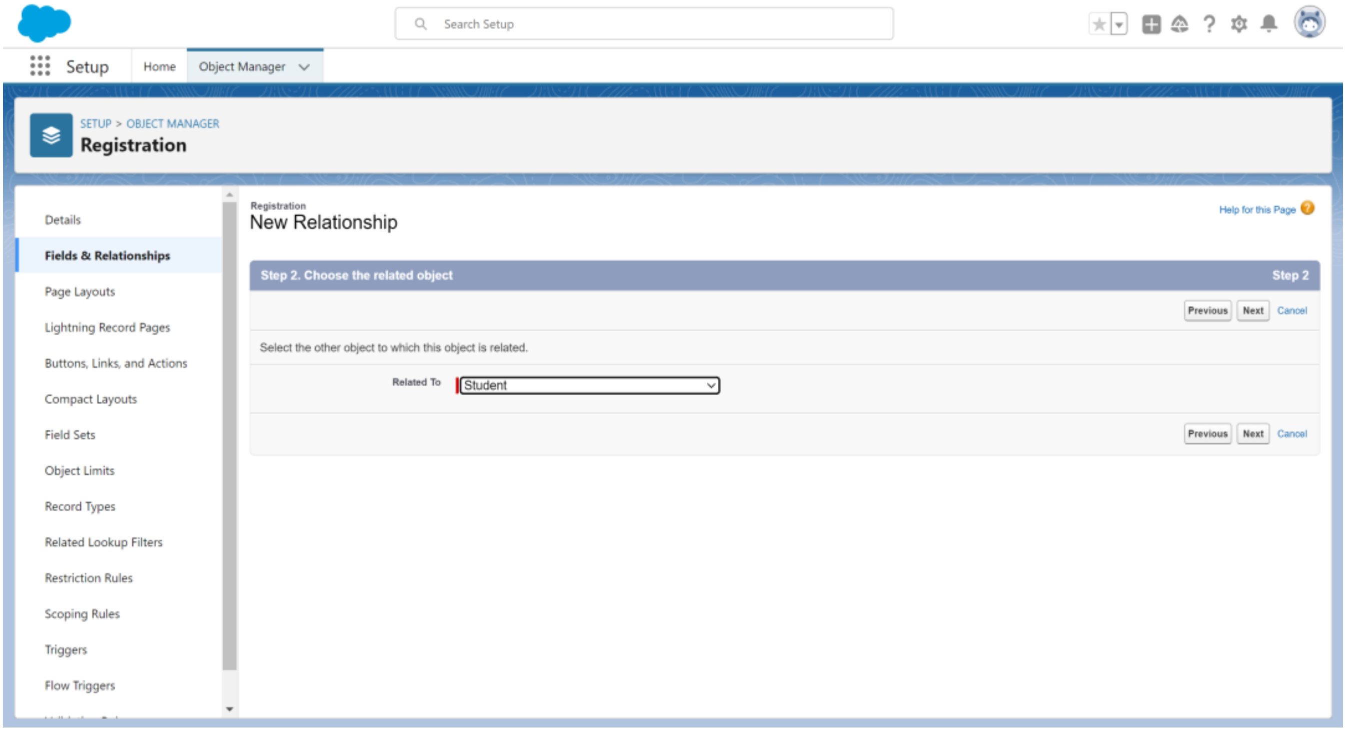
1. Download spreadsheet from the skill wallet.
2. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object from Spreadsheet.
3. Upload the file.
4. Enter the fields and click save.
5. Do the same for the other 3 objects also Consultant, Student, Appointment.

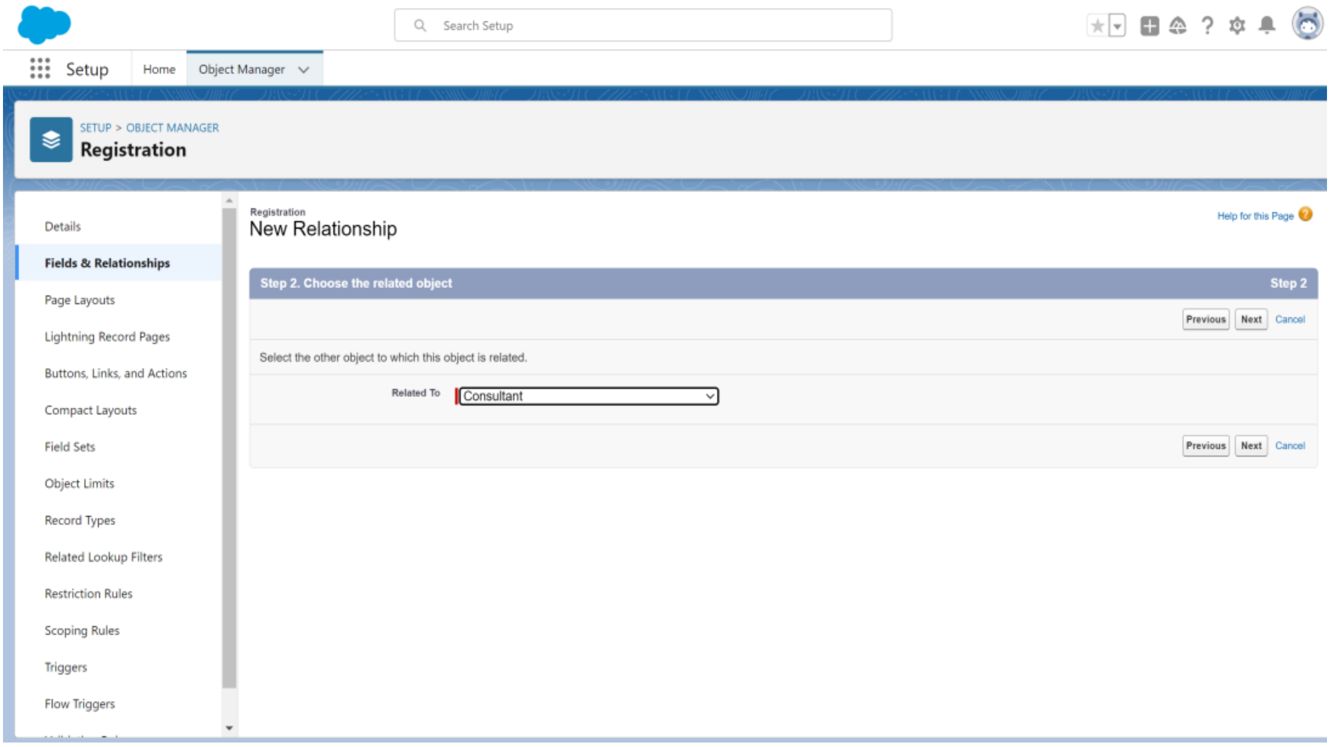


b)Create Relationship among the objects:

Create Lookup Relationship Between ‘Appointment’ and ‘Student’ and ‘Consultant’

1. Object Manager >> Appointment >> Fields & Relationships >> New.
2. Field Type: Lookup Relationship.
3. Related To: Student
4. Field Label: Student
5. Click save.
6. Repeat same steps to create relationship between Appointment and Consultant

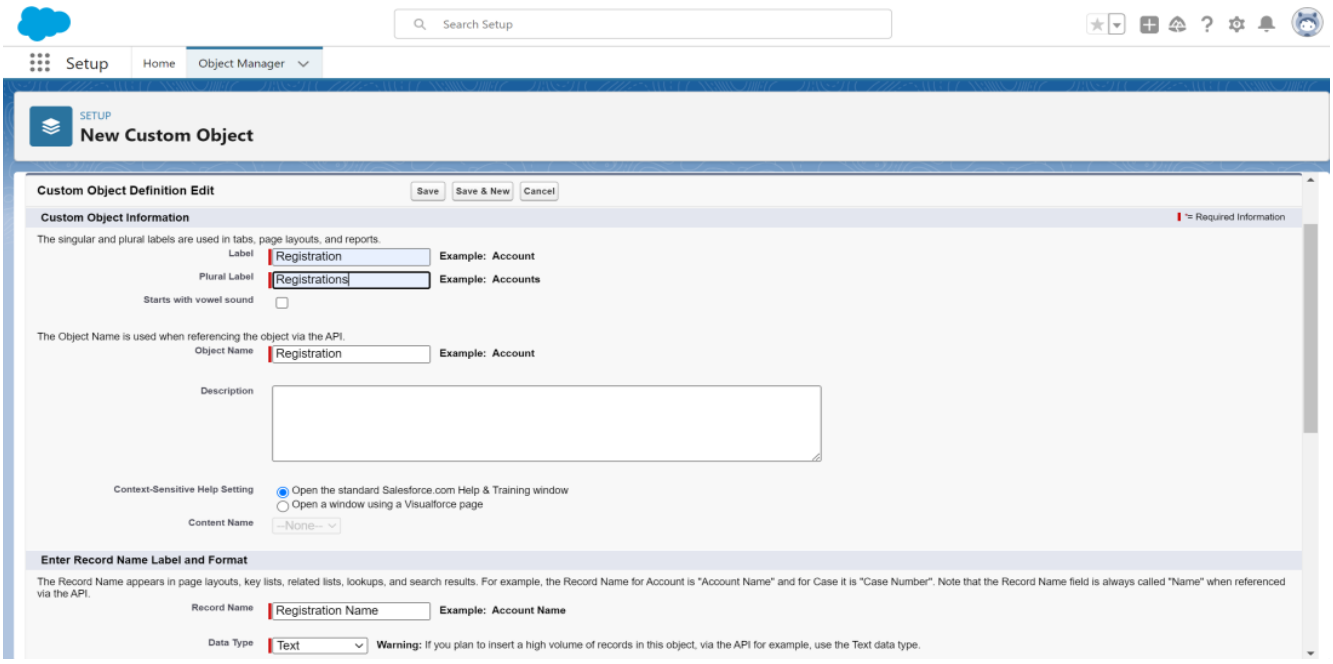




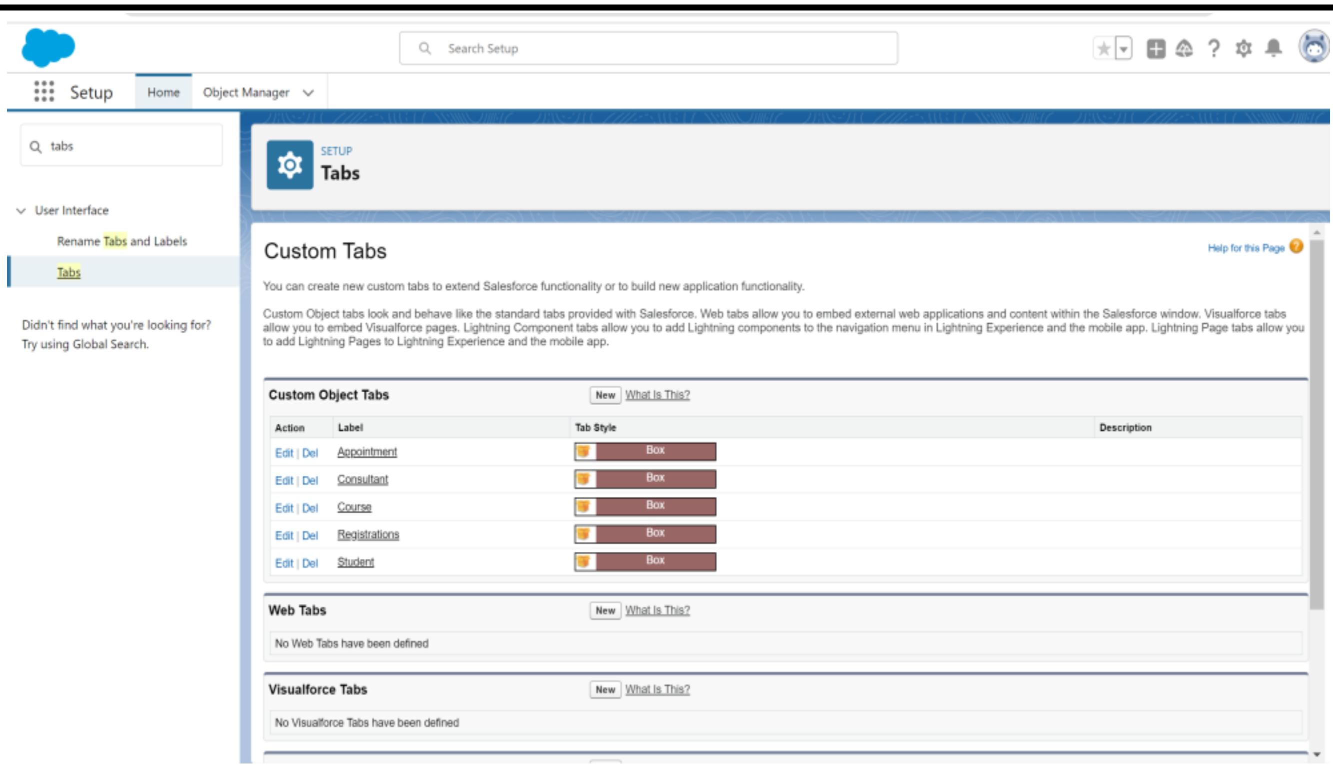
c)**Create the Registration Object**

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> Registration

3. Plural label name >> Registrations
4. Click save.

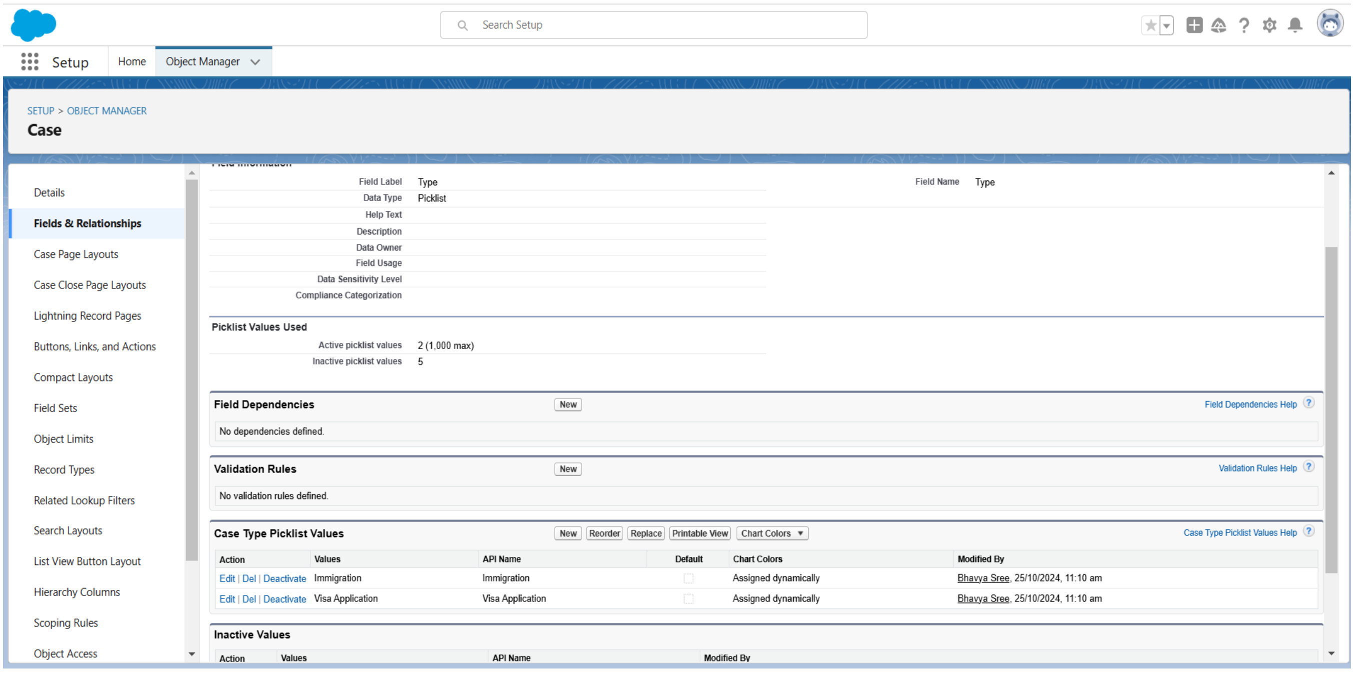


D)Create Tabs:
1. Setup >> Tabs >> New.
2. Under the Custom Object Tabs section, click New.
3. Object: Appointment
   Consultant
   Course
   Registrations
   Student
4. Select a Tab Style.
5. Click save.



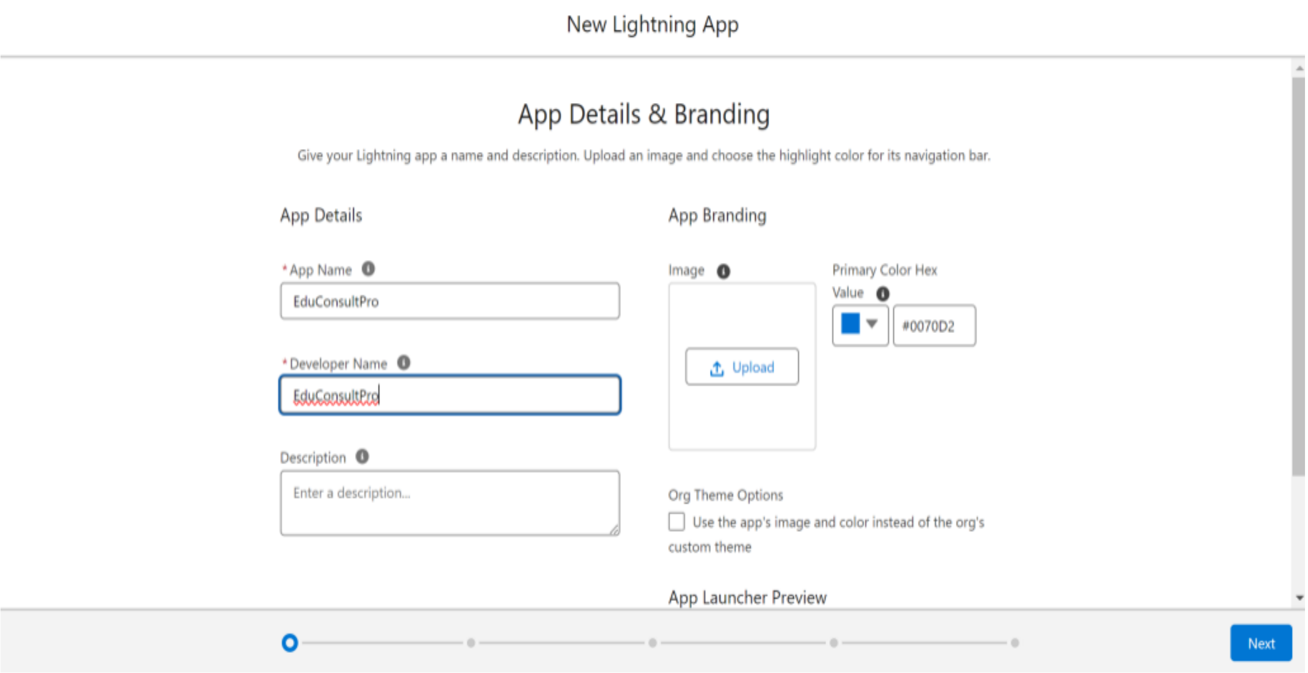
E)**Configure The Case Object**

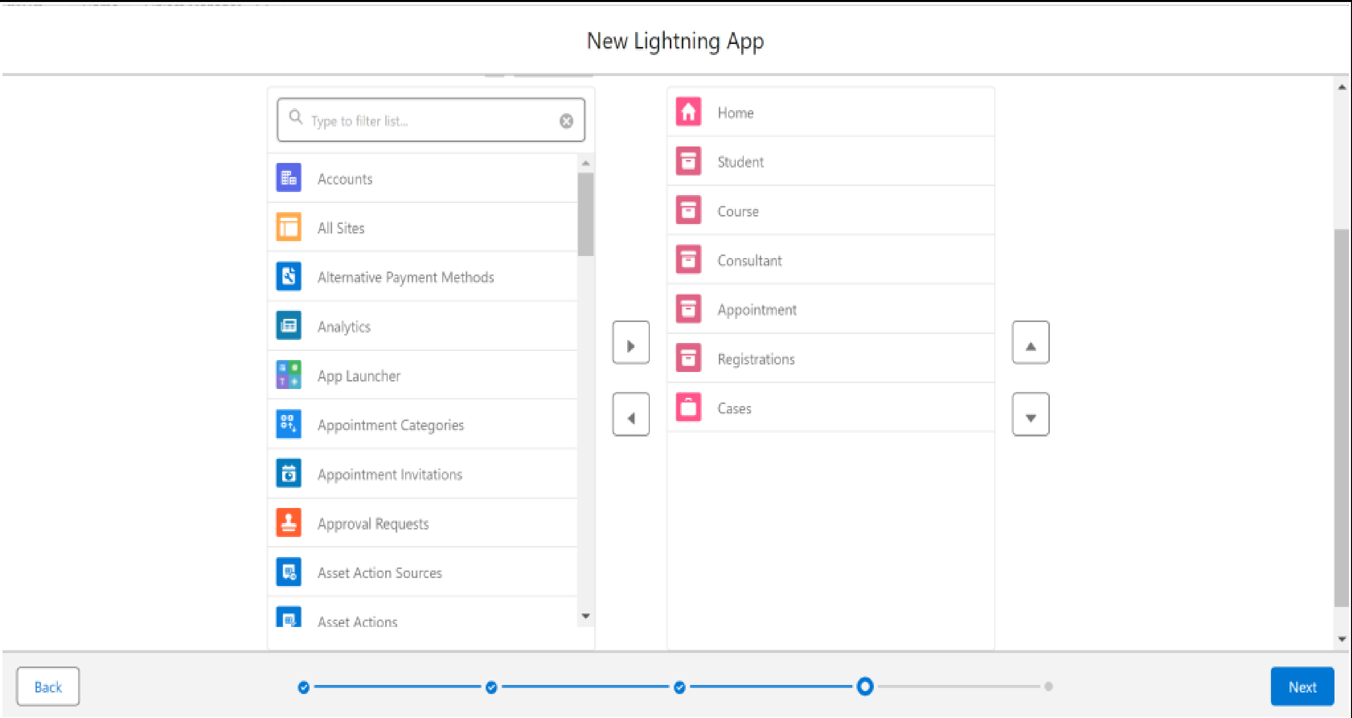
1. Go to object manager, edit case object.
2. Select the "Type" field and add the values in it.
    Immigration
    Visa Application
3. Now Select the "Status" field and add the values in it.
    Open
    In-progress



F)Create a Lightning App

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
2. App Name: Enter EduConsultPro.
3. Click Next.
4. In the Available Items list, select and add the following items to the Selected Items list:
   - Home
   - Students
   - Courses
   - Consultants
   - Appointments
   - Registrations
   - Cases
5. After adding the items, click Next.
6. In the Available Profiles list, select System Administrator.
7. Click the arrow to move it to the Selected Profiles list.
8. Click Save & Finish.





TASK 3: CREATE A SCREENFLOW FOR STUDENT ADMISSION APPLICATION PROCESS

a) Add Screen Element

1. Select Setup from the dropdown menu.
2. In the Quick Find box, type Flow Builder and click on it.
3. Click on New Flow.
4. Select Screen Flow and click Create.
5. From the Elements panel on the left, drag the Screen element onto the canvas.
6. In the Screen Properties pane on the right, set the Label to Student Info.

b) Create Student Record using Create Element

1. In the Elements panel on the left, drag the Create Records element onto the canvas, just below the "Student Info" Screen element.
2. In the Create Records Properties pane on the right, set the Label to “Create Student Record”.
3. How Many Records to Create: Select One.
4. How to Set the Record Fields: Select Use all values from a record.
5. Create a Record from These Values: Select the record variable resource StudentRecordRes that you created in the "Student Info" Screen element.
6. Click Done to complete the configuration of the Create element.

c) Add Screen Element

1. From the Elements panel on the left, drag the Screen element onto the canvas, just below the "Create Student Record" element.
2. In the Screen Properties pane on the right, set the Label to “Course Screen”.
3. In the Screen configuration, drag the Picklist component from the left panel into the screen area.

4. Set the Label of the picklist to Select Course.
5. In the Picklist component settings, go to the Choices section.
6. Under Choices, type IELTS and press Enter. This will automatically create a variable named IELTS.
7. Repeat the process for the following choices:
   - GRE
   - GMAT
   - Duolingo
   - TOEFL
8. After adding all the choices, click Done to finalize the Screen element.

d) Add Decision Element

1. From the Elements panel on the left, drag the Decision element onto the canvas, just below the "Course Screen" element.
2. In the Decision Properties pane on the right, set the Label to "Selecting Course".
3. Under Outcome Details, label the first outcome as Selected IELTS.
4. Set the condition as follows:
   Resource: Select_Course (the picklist component from the "Course Screen" element)
   Operator: Equals
   Value: IELTS (the choice variable from the "Course Screen" element)
5. Click on the + Add Outcome button to add new outcomes for the other course options.
6. Repeat the steps above to create conditions for:15
   - GRE
   - GMAT
   - Duolingo
   - TOEFL
7. Click Done.

e) Add GET Record Element

1. Drag the Get Records element onto the canvas, just after the IELTS outcome from the Decision element.
2. In the Get Records Properties pane, label the element as "Get IELTS Rec".
3. Configure the GET Record Element:
   Object: Select Course.
   Condition Requirements: Set it to All Conditions Are Met (AND).16
   Field: Choose Course Name.
   Operator: Set to Equals.
   Value: Set to {!Select_Course} (the value from the Select Course Screen element).
4. Repeat steps 2 and 3 for each of the following courses:
   - GRE (Label: Get GRE Rec)
   - GMAT (Label: Get GMAT Rec)
   - TOEFL (Label: Get TOEFL Rec)
   - Duolingo (Label: Get Duolingo Rec)
4. Once all GET Record elements are configured, click Save at the top right.

f) Create Registration Record using Create Records Element

1. Drag the Create Records element onto the canvas, just after the Get IELTS Rec element.
2. In the Create Records Properties pane, label the element as Create IELTS Registration Rec.
3. Configure the Create Records Element:
   How Many Records to Create: Select One.
   How to Set the Record Fields: Select Use separate resources, and literal values.
   Object: Select Registration.
   Field: Course_Name__c

Value: {!Get_IELTS_Rec.Id}
Field: Student_Name__c
Value: {!StudentRecordRes.Id}

4. Repeat steps 2 and 3 for each of the following courses:
   - GRE (Label: Create GRE Registration Rec)
   - GMAT (Label: Create GMAT Registration Rec)
   - TOEFL (Label: Create TOEFL Registration Rec)
   - Duolingo (Label: Create Duolingo Registration Rec)
5. Once all Create Records elements are configured, click Save at the top right

g) Create Email Text Template Variables for email body and subject

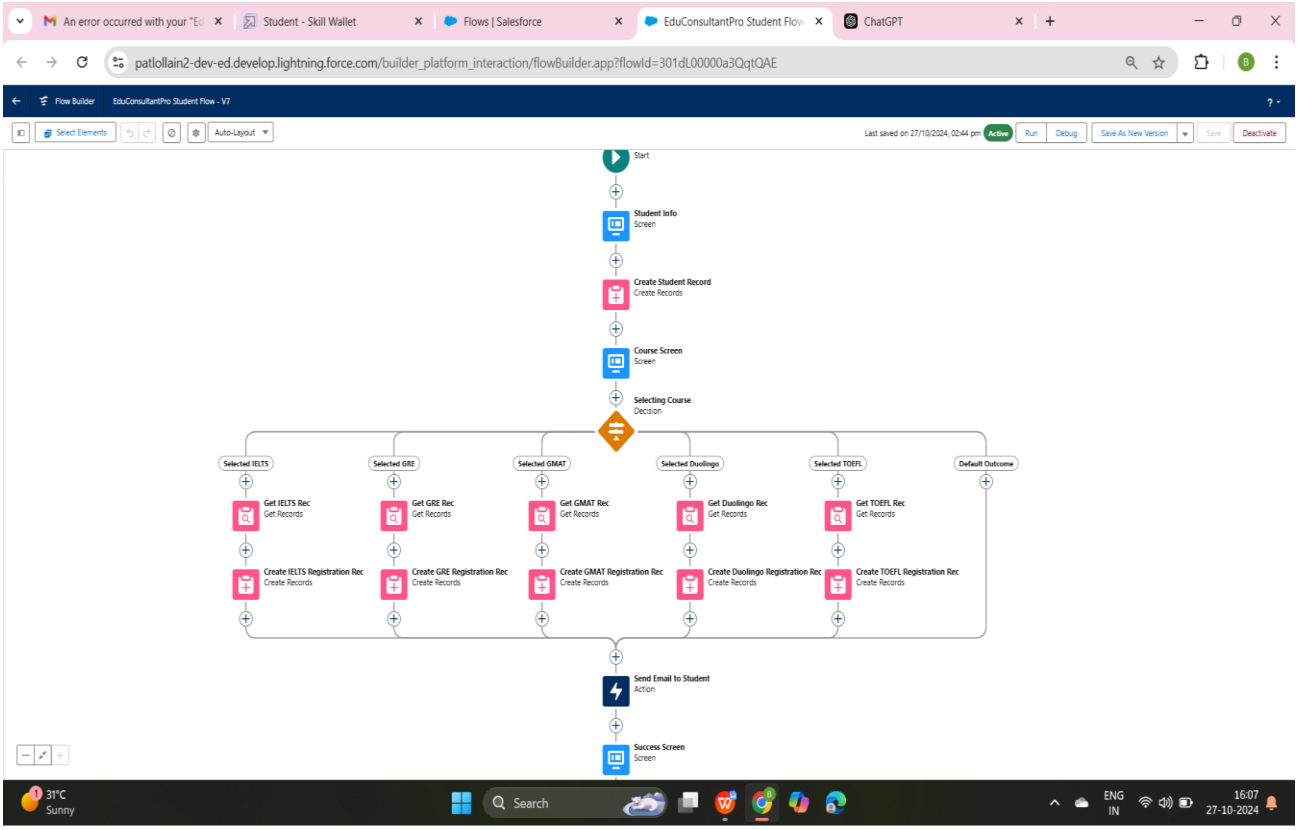
1. Click on the toggle toolbox on the left corner, click "New Resource", then select "Text Template" as Resource Type.
2. Configure the Text Template:
   API Name: Enter StuRegistrationEmailTextTempBody.
   Template Type: Select View as Plain Text.
   Body: Paste the relevant text
3. Click on the toggle toolbox on the left corner, click "New Resource", then select "Text Template" as Resource Type.
4. Configure the Text Template:
   API Name: Enter StuRegistrationEmailTextTempSub.
   Template Type: Select View as Plain Text.
   Body: Enter a subject line for the email.

h) Add an Action Element

1. Drag the Action element onto the canvas, placing it after all the Decision paths (i.e., after the paths for IELTS, GRE, GMAT, TOEFL, and Duolingo).
2. Label the Action Element as "Send Email to Student".
3. Set Input Values for Selected Action:
   Body: Set to {!StuRegistrationEmailTextTempBody}.
   Recipient Address List: Set to {!StudentRecordRes.Email__c}.
   Subject: Set to {!StuRegistrationEmailTextTempSub}.
3. Click Save at the top right to save your changes.

i) Add Screen Element

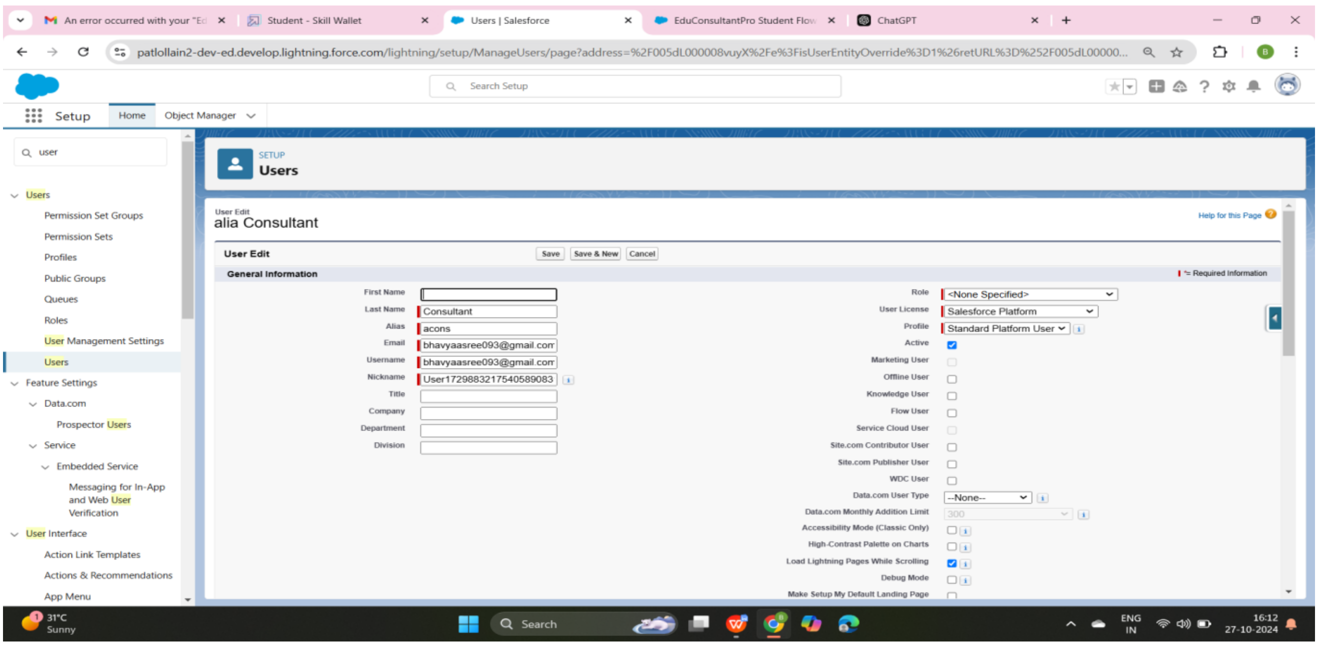
1. Drag a Screen element onto the canvas, placing it after the Send Email to Student Action Element.
2. Label this Screen element as "Success Screen".
3. From the left side panel, search for the Display Text component and drag it to the main panel of the Success Screen.
4. Label the Display Text component as "SuccessMessage".
5. In the Resource Picker box for the Display Text component.
6. Click Done to save the Display Text component.
7. Click Save at the top right.
8. Name the Flow EduConsultPro Student Flow.
9. Click Activate.



TASK 4: CREATE USERS

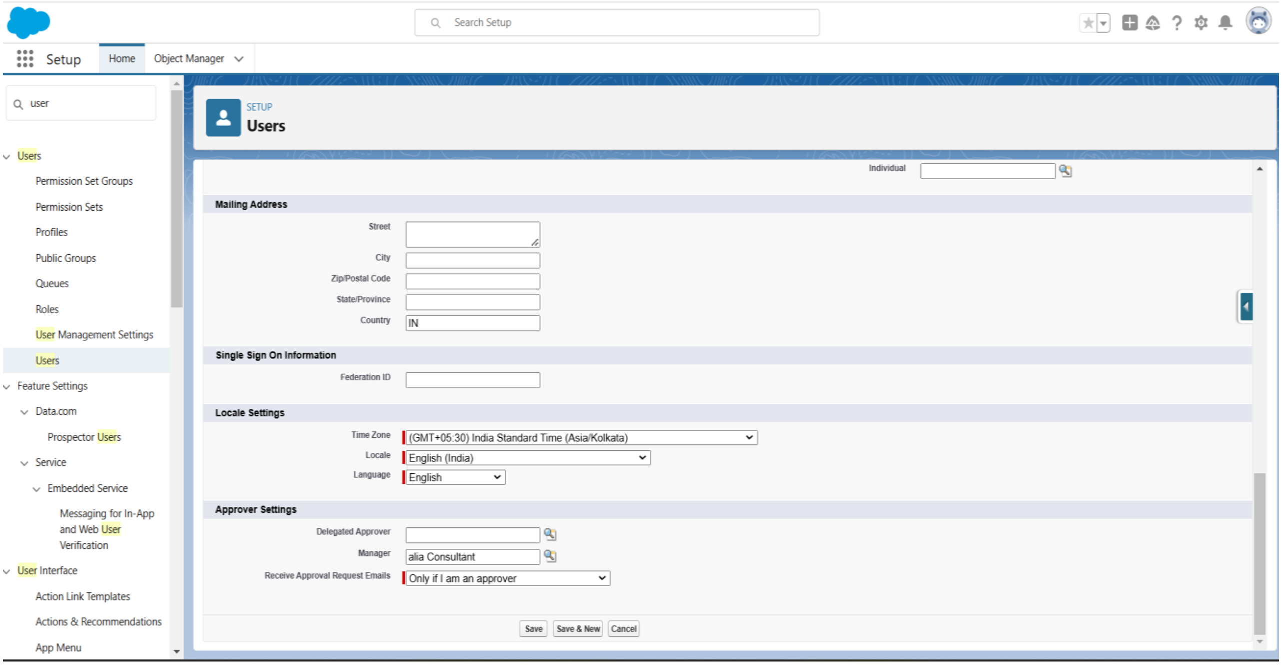
a) User

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



b) Configure the User Settings

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



TASK 5: CREATE AN APPROVAL PROCESS FOR PROPERTY OBJECT

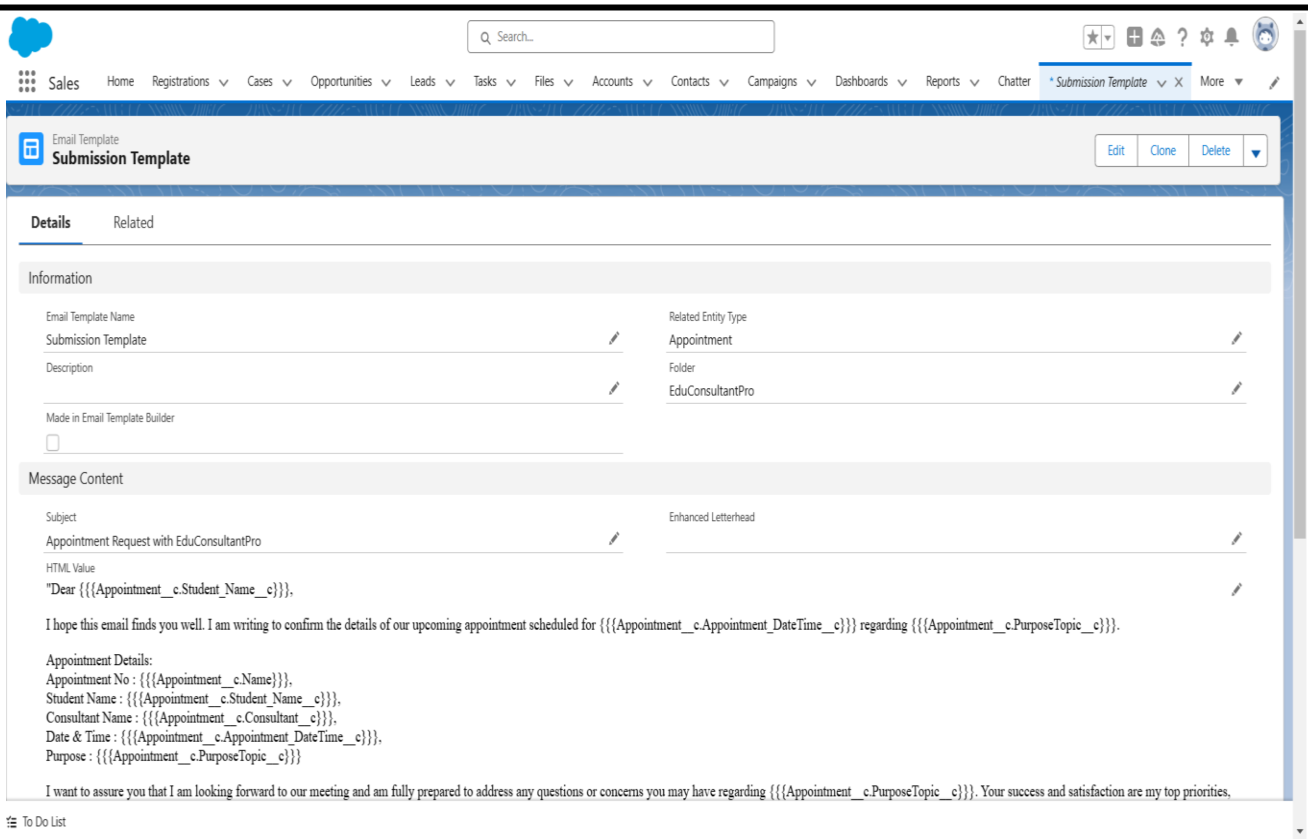
a) Create an Email Template

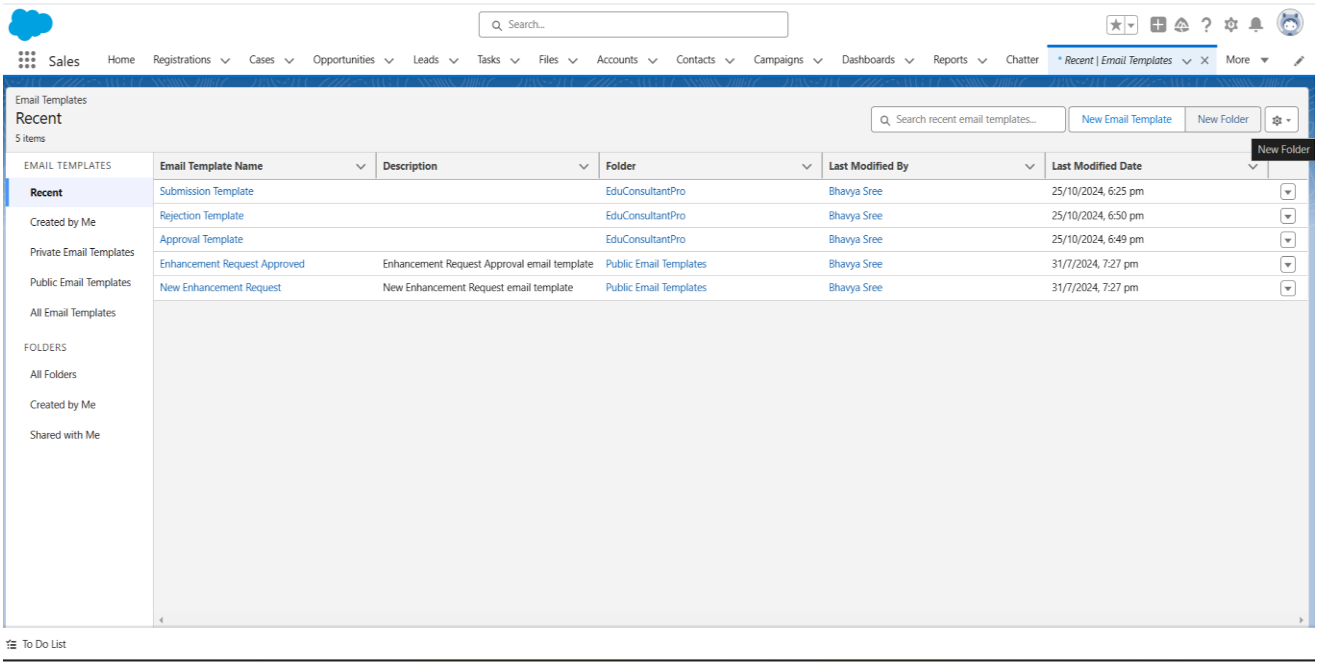
Go to the App Launcher and search for Email Templates.

1. Click New Folder.
2. Enter the desired folder name.
3. Save the folder.
4. Access Lightning Email Templates:
   - Go to Setup.
   - Enter Templates in the Quick Find box and select Lightning Email Templates.
   - Toggle it on if not already enabled.

a) Create an Email Template for Submission Template

1. Click New Email Template.
2. Select the folder created earlier.
3. Enter Submission Template as the name.
4. Paste the HTML code in the HTML Value field.
5. Click save
6. Repeat the similar steps for Approval Template and Rejection Template.

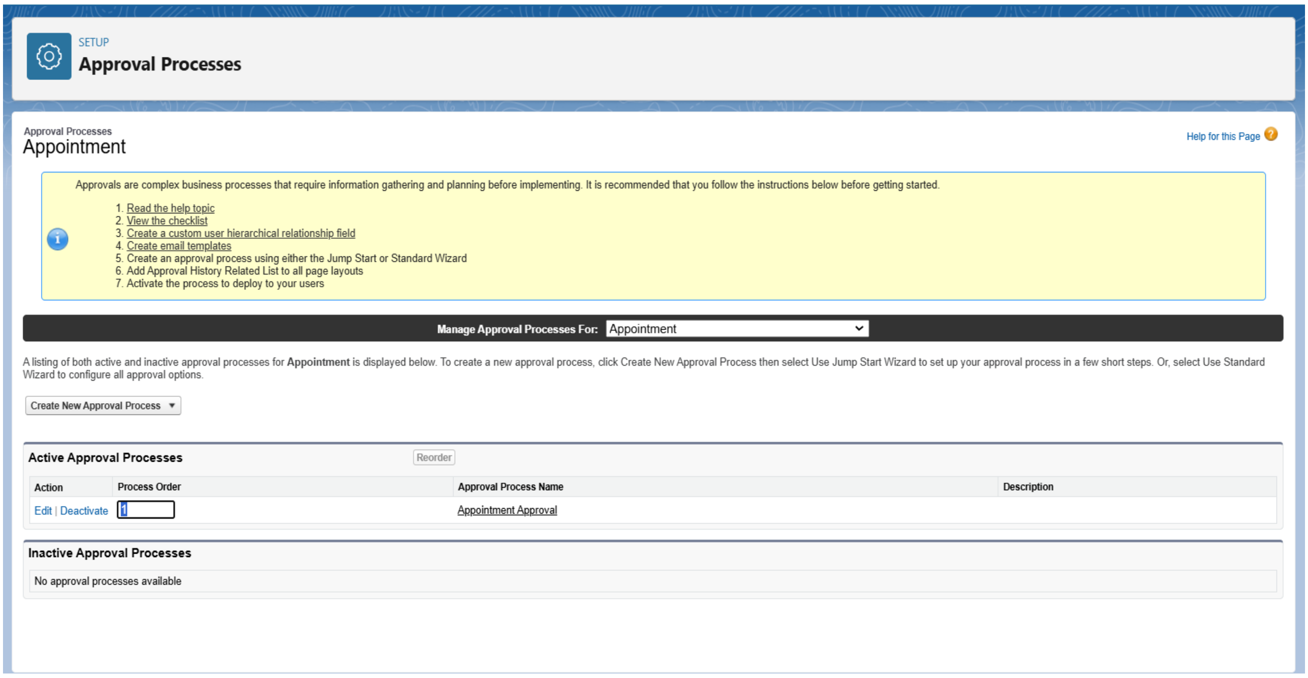




a) Create New Approval Process

1. Go to Setup.
2. Enter Approval in the Quick Find box and select Approval Processes.

3. In Manage Approval Processes For, select Appointment.
4. Click Create New Approval Process.
   - Choose Use Jump Start Wizard.
   - Process Name: Appointment Approval
   - Under Select Approver: Select Manager for the option: “Automatically assign an approver using a standard or custom hierarchy field.”
5. Click Next and Next under Automated Approver Determined By: Select Manager.
6. From Record Editability Properties: Choose Administrators OR the currently assigned approver can edit records during the approval process.
6. Click Save.



7.Click View Approval Process Detail Page.
8.Under Initial Submission Actions, click Add New --> Field Update, and configure it with these values.

Field	Value
Name	Submitted
Field to Update	Appointment: Status
A Specific value	Pending

9.Click Add New --> Email Alert, and configure it with these values.
Description : Submission Email Alert

Unique Name : Auto Populates
Email Template : Submission Template
Recipient Type : Select your Name

10.Repeat the Steps 10 - 11 for Final Approval and Final Rejection actions.

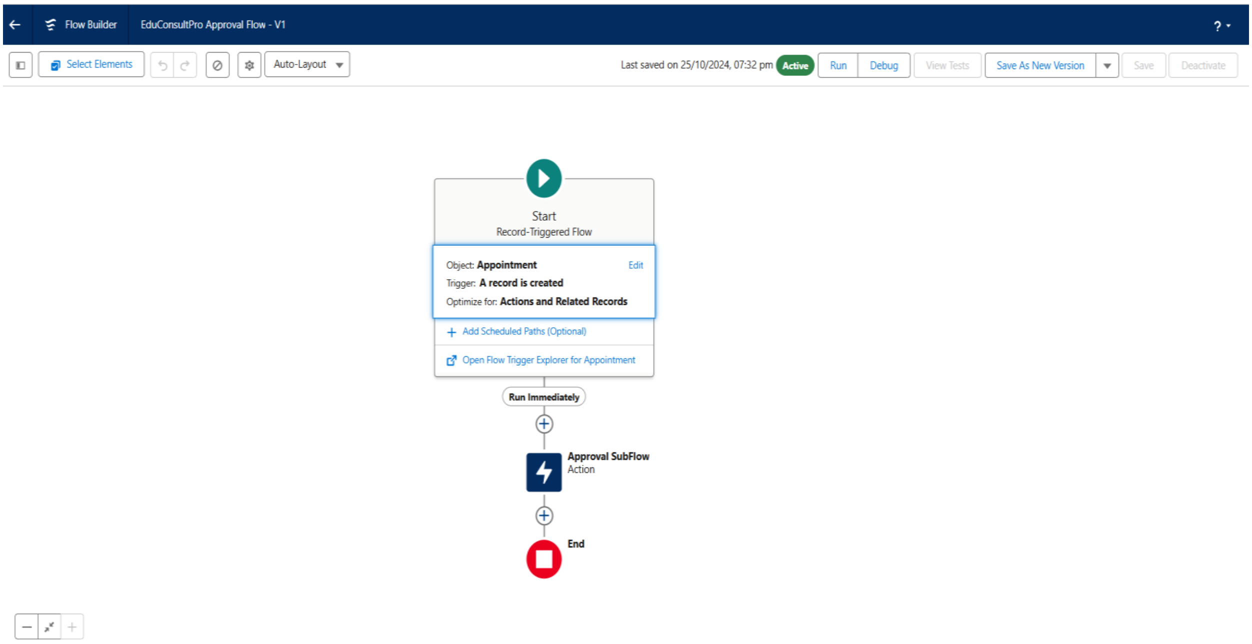
TASK 6: CREATE A RECORD TRIGGERED FLOW

a) Configure the Start Element

1. From Setup, enter Flows in the Quick Find box and select Flows.
2. Click New Flow.
3. Select Record-Triggered Flow.
4. Click Create. The Configure Start window opens.
5. For Object: Select Appointment.
6. For Trigger the Flow When: Select A record is created

b) Add an Action Element

1. Drag an Action element onto the canvas after the Start element.
2. Configure Action Element:
   Select Action: Choose Submit for Approval.
   Label: Enter Approval SubFlow.
   Set RecordId: Set to {!$Record.Id}.
3. Click Save.
4. Flow Name: Enter EduConsultPro Approval Flow.
5. Click Activate.



TASK 7: CREATE A SCREENFLOW FOR EXISTING STUDENT TO BOOK AN APPOINTMENT

a) Add Screen Element

1. From Setup, enter Flow Builder in the Quick Find box and select Flow Builder.
2. Click New Flow and select Screen Flow.
3. Click Create.
4. Drag a Screen element onto the canvas.
   - Label: Enter Get Student Info.
   - Add Components:
5. Drag a Text component from the left side panel to the screen.
   Label: Enter Student Name.
6. Drag another Text component from the left side panel to the screen.
   Label: Enter Student Email.

b) Add GET Record Element

1. After the Screen element, drag a Get Records element onto the canvas.
2. Configure GET Record Element:
   Label: Enter Get Rec.
   Object: Select Student.
   Condition Requirements: Select All Conditions are Met (AND).
3. Set Conditions:
   Field: Select Student Name.
   Operator: Select Equals.
   Value: Select !{Enter_Student_Name}.
4. Click + Add Condition to add another condition.
   Field: Select Email__c.
   Operator: Select Equals.
   Value: Select !{Enter_Student_Email}.
5. Click Done to complete the configuration of the GET Record element

c) Add Screen element

1. After the GET Record Element, drag a Decision element onto the canvas.
2. Label: Display Student Details
3. Click save.

d) **Add Decision Element**

1. After the Select Display Student Details Element, drag a Decision element onto the canvas.
2. Label: Enter Appointment or Case.
3. Outcome 1:
   Label: Enter Appointment.
   Condition:
   Resource: Select !{How_may_I_Help_you} (This should be a variable or field from the previous screen element).
   Operator: Select Equals.
   Value: Enter !{Book_an_Appointment}.
4. Outcome 2: (For Case)
   Click the + icon to add another outcome.
   Label: Enter the label for the Case option.
   Condition:
   Resource: Select !{How_may_I_Help_you}.
   Operator: Select Equals.
   Value: Enter the value corresponding to the Case option.

5. Once you've added all necessary outcomes, Click Done.

e) Add Screen Element

1. After the Decision Element (on the Appointment path), drag a Screen element onto the canvas.
2. Label: Enter Appointment Booking Screen.
3. In the Screen Properties panel, click on Fields.
4. Click on the Record Variable Input and select the option to Create a New Resource.
5. Create New Resource:
   Resource Type: Select Variable.
   API Name: Enter AppointmentRecordRes.
   Data Type: Select Record.
   Object: Choose Appointment from the list of objects.
6. Click Done.
7. Drag and drop the required fields from the AppointmentRecordRes variable into the screen.
8. Ensure you include all necessary fields to collect the student's appointment details (e.g., Appointment Date, Student Name, Consultant Name, Purpose, etc.).
9. After adding all required fields, Click Done.

f) Add GET Record Element

1. After the Decision Element (under the Appointment path), drag a GET Record element onto the canvas.
2. Configure GET Record Element:
   Label: Enter Get Consultant Rec.
   Object: Select Consultant from the list of objects.
3. Set Condition Requirements:
   Condition Requirements: Select All Conditions are Met (AND).
   Field: Choose Name.
   Operator: Select Equals.39
   Value: Enter {!AppointmentRecordRes.Consultant_Name__c}.
4. Click Done.

g) Create Appointment Record using Create Records Element

1. After the Get Consultant Rec element, drag a Create Records element onto the canvas.
2. Configure Create Records Element:
   Label: Enter Create Appointment.
   How Many Records to Create: Select One.
   How to Set the Record Fields: Select Use separate resources, and literal values.
3. Select object ‘Appointment’.
4. Map the Fields:
   Field: Appointment_DateTime__c
   Value: {!AppointmentRecordRes.Appointment_DateTime__c}
   Field: Consultant__c
   Value: {!Get_Consultant_Rec.Id}
   Field: Notes__c
   Value: {!AppointmentRecordRes.Notes__c}
   Field: PurposeTopic__c
   Value: {!AppointmentRecordRes.PurposeTopic__c}
   Field: Student_Name__c40
   Value: {!Get_Rec.Id}
5. Click Done

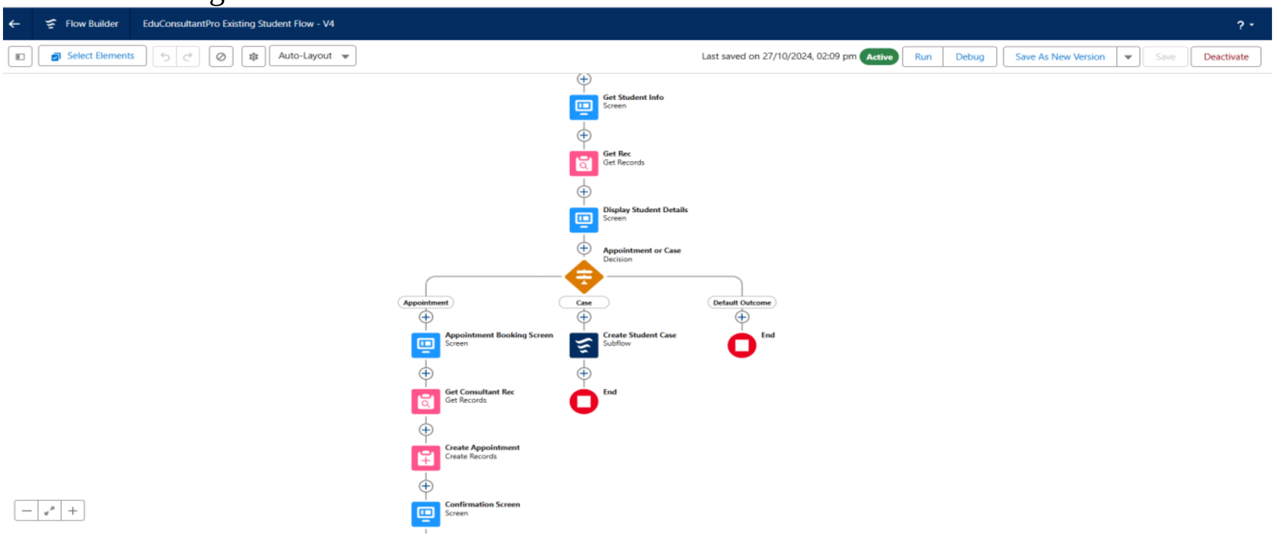
h) Add Screen Element

1. After the Send Email to Student action element, drag a Screen element onto the canvas.

2. Label: Enter Confirmation Screen.
3. From the left side panel, search for the Display Text component and drag it into the main panel.
4. Label: Enter Appointment_Confirmation.
5. In the Resource picker box, paste the following text:
   Consultant Name: {!Get_Consultant_Rec.Name},
   Date & Time: {!AppointmentRecordRes.Appointment_DateTime__c},
   Notes: {!AppointmentRecordRes.Notes__c}
7. Click Done.

i) Add an SubFlow Element

1. After the Decision Element on the Case path, drag a Subflow element onto the canvas.
2. Search and Select: In the SubFlow search box, find and select the flow labeled "Create a Case".
3. Label: Enter Create Student Case.
4. Click Save.
5. Flow Label: Enter EduConsultantPro Existing Student Flow.
6. Click Save again to finalize.



TASK 8: CREATE A SCREENFLOW TO COMBINE ALL THE FLOWS AT ONE PLACE

a) Add Screen Element

1. From Setup, enter Flow Builder in the Quick Find box and select Flow Builder.
2. Click New Flow and select Screen Flow.
3. In your flow, drag a Screen element onto the canvas.
4. Set the Label to Welcome Screen.
5. In the left side panel, search for the Display Text component.
6. Drag the Display Text component to the main panel.
7. Set the Label to SuccessMessage.
8. In the Resource Picker box write the relevant message.

b) Add Screen Element

1. In your flow, drag a Screen element onto the canvas.
2. Place this element after the Welcome Screen element.
3. Set the Label to Existing or New Student Confirmation Screen.
4. In the left side panel, search for the Radio Button component.
5. Drag the Radio Button component to the main panel.
6. Set the Label for the Radio Button to Are you an Existing Student?.
7. Click on Add Choice.
8. Create the 'Yes' Choice:

In the input field, type Yes.
Click Create Yes choice.

9. Create the 'No' Choice:
   Repeat the steps for adding a choice.
   In the input field, type No.
   Click Create No choice.
10. After adding both the Yes and No choices, click Done to finalize the configuration.

c) Add Decision Element

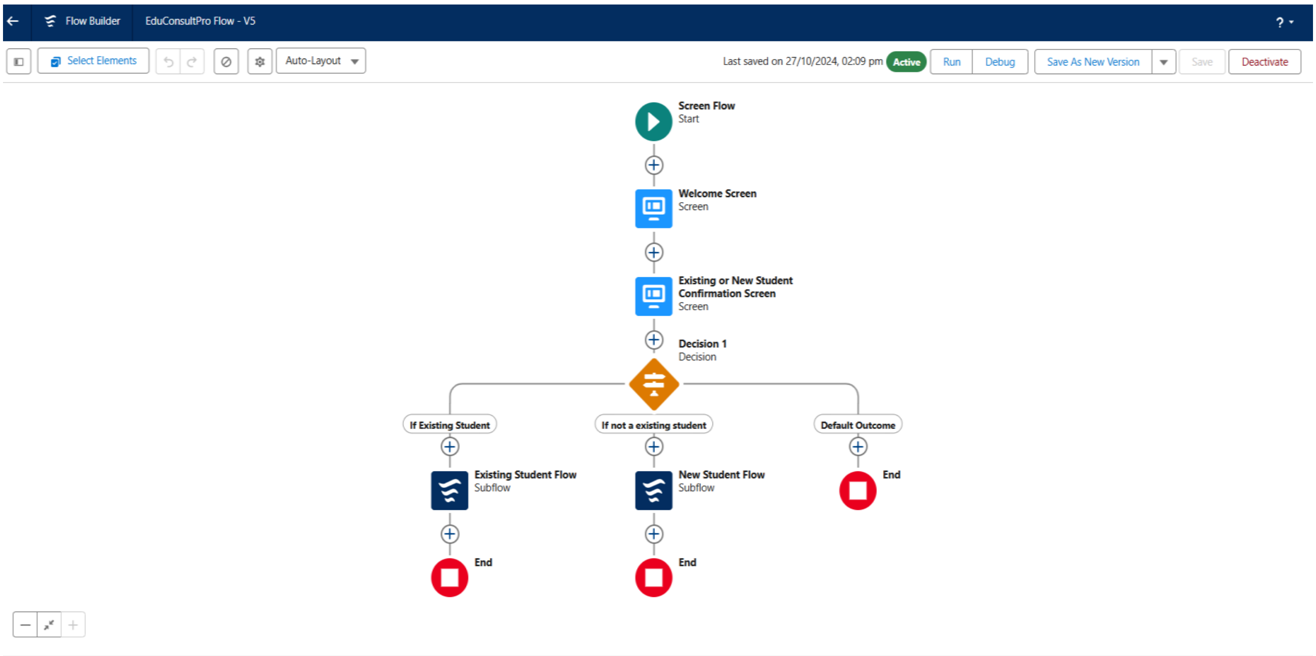
1. Drag a Decision element onto the canvas after the Existing or New Student Confirmation Screen element.
2. Set the Label to Decision 1.
3. Configure the Outcome for Existing Students:
   Under Outcome Label, enter If Existing Student.
   For the Resource, select {!Are_you_a_Existing_Student} (this should be the variable for the radio button choice).
   Set the Operator to Equals.
   For the Value, enter Yes (this is the value for the existing student choice).
4. Add Additional Outcome for New Students:
   Click the + icon to add another outcome.
   Enter If New Student for the Outcome Label.
   For the Resource, select {!Are_you_a_Existing_Student}.
   Set the Operator to Equals.
   For the Value, enter No (this is the value for the new student choice).
5. After configuring the outcomes, click Done to save the Decision element.

d) Add an SubFlow Element

1. Drag a Subflow element onto the canvas after the Decision 1 element on the "If Existing Student" path.
2. Set the Label to Existing Student Flow.
3. In the Subflow element settings, search for and select EduConsultantPro Existing Student Flow from the list of available subflows.
4. Set up any necessary input or output parameters based on how the EduConsultantPro Existing Student Flow is designed.
5. Click Save to ensure all changes are recorded.
6. After configuring the subflow element, click Done to save your changes.

e) Add another SubFlow Element

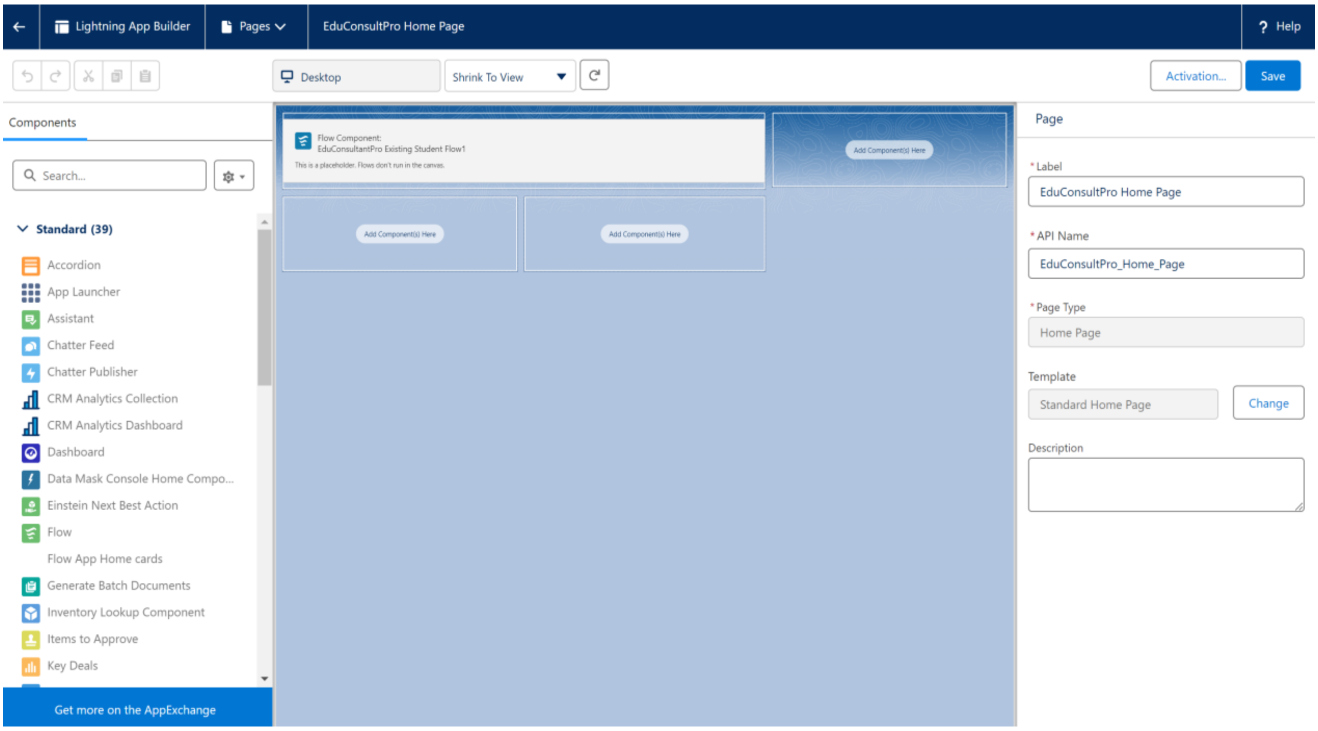
1. Drag a Subflow element onto the canvas after the Decision 1 element on the "If Not Existing Student" path.
2. Set the Label to New Student Flow.
3. In the Subflow element settings, search for and select EduConsultantPro Student Flow from the list of available subflows.
4. Set up any necessary input or output parameters based on how the EduConsultantPro Student Flow is designed.
5. Click Save to ensure all changes are recorded.
6. After configuring the subflow element, click Done to save your changes.
7. Click on Save and name the flow as EduConsultPro Flow.
8. After saving, click on Activate.



TASK 9: CREATE A LIGHTNING APP PAGE

1. From Setup, App Builder in the Quick Find box, then select Lightning App Builder.
2. Click New.
3. Select Home Page and click Next.
4. Name the page EduConsultPro Home Page.
5. Select the Standard Home Page template.
6. Click Done.
7. Drag the Flow component from the left panel to the top-right region of the page.
8. In the Flow component's properties pane, search for and select the EduConsultPro Flow.

9. Click Save.
10. Click Activate.
11. Click App and Profile.
12. Select Sales app, then click Next.
13. Scroll down and select the System Administrator profile.
14. Click save.


Lightning App Builder
Pages
EduConsultPro Home Page
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Desktop
Shrink To View
Activation...
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Search...
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Assistant
Chatter Feed
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CRM Analytics Dashboard
Dashboard
Data Mask Console Home Compo...
Einstein Next Best Action
Flow
Flow App Home cards
Generate Batch Documents
Inventory Lookup Component
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Get more on the AppExchange
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API Name
EduConsultPro_Home_Page
Page Type
Home Page
Template
Standard Home Page
Change
Description

THANK YOU