

A CRM Application to Manage the Services offered by an Institution

By

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Abstract

The EduConsultPro Institute is one of these leading educational institutes that annually presents a greater quantity of various courses and programs for an increasing quantity of prospective students. The service standards need effective management in admissions management, student inquiries, and expert consulting to keep them in a high position. This project will entail the design and implementation of a comprehensive CRM application using Salesforce to support this process better and improve the experience of students and admissions staff alike. The solution will consist of features in admission application management, consulting services management, and immigration case management, among others. Admission Application Management will enable prospects to make applications online and for the admission staff to trace and scrutinize the applications through automated notifications. Consulting Services Management will help students create their request for expert advice, while consultants can schedule and manage their appointments with much ease. The Immigration Case Management will provide information on immigration- related questions and cases. Some features of this system include automated workflows, email notifications, comprehensive dashboards, and collaboration tools. EduConsultPro Institute has now revamped pages for their prospective students, which are smooth, transparent, and easily navigated, all made possible through the use of Salesforce CRM. The sole concept, however, is developing operational efficiencies with an increased throughput in the admission process through consulting services. Now, this project aligns not just with things up front but provides a nice platform for scalable and future-fit growth.

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INTRODUCTION

EduConsultPro Institute, a prestigious educational establishment, is committed to improving the management of its admission processes, consulting services, and immigration case handling. As the institute experiences a rise in student applications and service requests, it recognizes the need for a more efficient and integrated solution to address these challenges.

To enhance operational efficiency and provide a seamless experience for both prospective students and admissions staff, EduConsultPro Institute is turning to Salesforce CRM. This initiative will streamline various processes, including the handling of admission applications, consulting requests, and immigration cases, all within a single, cohesive CRM platform.

The project will involve:

- Developing a user-friendly admission application system that allows prospective students to apply online, with automated notifications and detailed reporting for admissions staff.
- Creating an efficient approval workflow for consulting requests, including automated email alerts and a streamlined submission process.
- Managing consulting services by enabling students to request consultations, schedule appointments, and track service statuses within Salesforce.
- Handling immigration cases by allowing students to initiate cases through multiple channels, manage documents, and track case progress with integrated tools.

Include the likes of setup of Salesforce objects, development of custom flows, designing for unified app pages, and more in lightning. These changes should be targeted at bringing a clearer and more smooth experience for the concerned users who are going through the processes of admission and consultation.

Task1

Create Objects from Spreadsheet

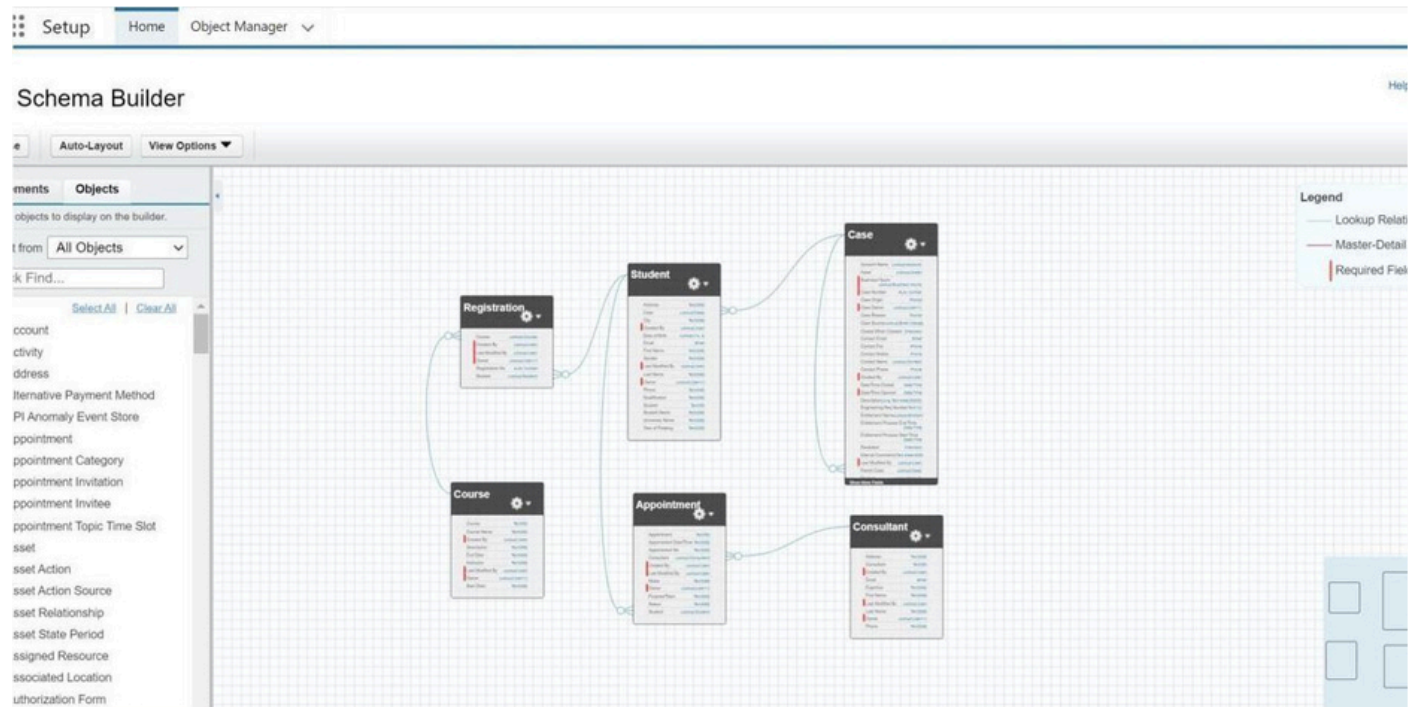
The outcome is enhanced services management at EduConsultPro Institute for which Salesforce functionality is leveraged to enable creation of objects directly from the spreadsheets. This will make it easier to integrate existing data in Salesforce and effectively manage the same for several institutional requirements.

Many objects were done using the spreadsheets given by the institution to solve the assignment. Course, Consultant, and Student, and Appointment are the objects designed, one representing a critical working of an institution. The lookup relationships between the said objects will ensure the design integrity and smooth navigation of data. At this point, lookup relationships were created between Appointment and Student and Appointment and Consultant.

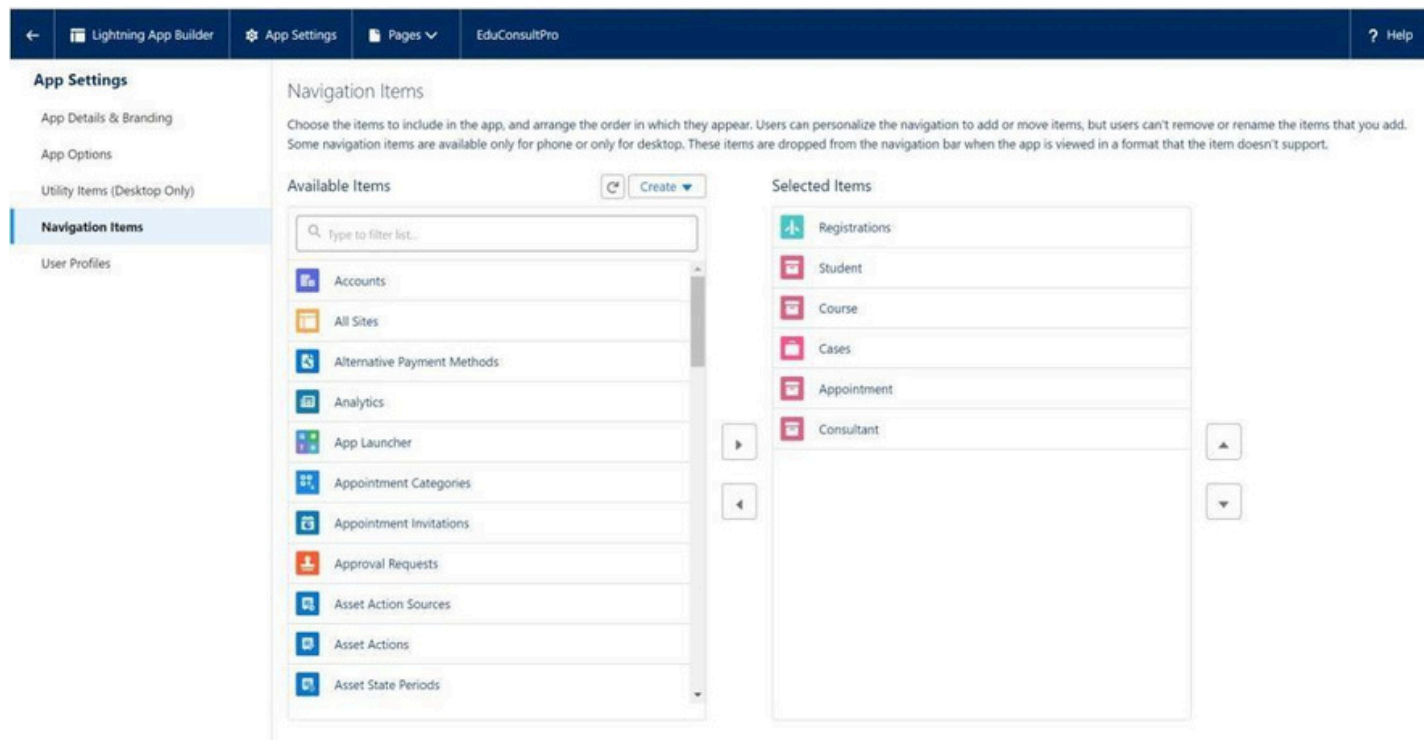
A new Registration object was created to hold student and course information and set up the lookup relationship on either an immigration or visa application regarding student queries between Student and Case.

It was set up to model the data regarding the requirement of the institution. For every new object, after that, tabs were created that would act as easy accesses. The Case object further customized Specified values entered for the "Type" field were Immigration and Visa Application those for "Status" were Open and In-progress. A new Lightning application, EduConsultPro, was developed that aggregates all these elements: home, students, courses, advisers, appointments, registrations, and cases. The interface was largely optimized for user experience between the system administrator and staff members, so it guaranteed proficient, effective, and transparent administration of all aspects of service within the Salesforce instance at the EduConsultPro Institute.

Screenshots:



Lookup relationship among Objects



Adding items to EduConsultPro

flow builder

Setup Home Object Manager

Workflow Actions

- Email Alerts
- Field Updates
- Outbound Messages
- Send Actions
- Tasks
- Workflow Rules

Environments

- Monitoring
- Time-Based Workflow

Identity

- Login Flows

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Flow Definitions

All Flows

44 items • Sorted by Flow Label • Filtered by All flow definitions • Updated 17 minutes ago

Flow Label	Process Type	A...	Te...	Package State	Pa...	Last Modifi...	Last Modified ...
Deploy Data Kit Compo...	Autolaunched Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Discount Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
EduConsultPro Approval...	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Sneha Krothap...	07/08/2024, 3:43 pm
EduConsultPro Student ...	Screen Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Sneha Krothap...	07/08/2024, 2:37 pm
Enablement: Send Feed...	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Enroll or Unenroll Servic...	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Even Exchange Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

EduConsultPro Lightning App

Search Setup

Setup Home Object Manager

Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Case Reason Picklist Values

New Reorder Replace Printable View Chart Colors

Action	Values	API Name	Available in Self-Service	Default	Chart Colors	Modified By
Edit Del Deactivate	Installation	Installation	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Sneha Krothapalli, 22/07/2024, 7:26 pm
Edit Del Deactivate	Equipment Complexity	Equipment Complexity	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Sneha Krothapalli, 22/07/2024, 7:26 pm
Edit Del Deactivate	Performance	Performance	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Sneha Krothapalli, 22/07/2024, 7:26 pm
Edit Del Deactivate	Breakdown	Breakdown	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Sneha Krothapalli, 22/07/2024, 7:26 pm
Edit Del Deactivate	Equipment Design	Equipment Design	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Sneha Krothapalli, 22/07/2024, 7:26 pm
Edit Del Deactivate	Feedback	Feedback	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Sneha Krothapalli, 22/07/2024, 7:26 pm
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Sneha Krothapalli, 22/07/2024, 7:26 pm

Inactive Values

No Inactive Values values defined.

Configuring the Case Object

Task2

Create a ScreenFlow for Student Admission Application process

The EduConsultPro Student Flow simplifies the registration process for students by creating a more user-friendly application. I added the Screen element, represented as a "Student Info," which was there to carry all the information that pertained to the student. Therefore, I created a record variable known as StudentRecordRes to view the fields from the student object and present a very light experience when getting data.

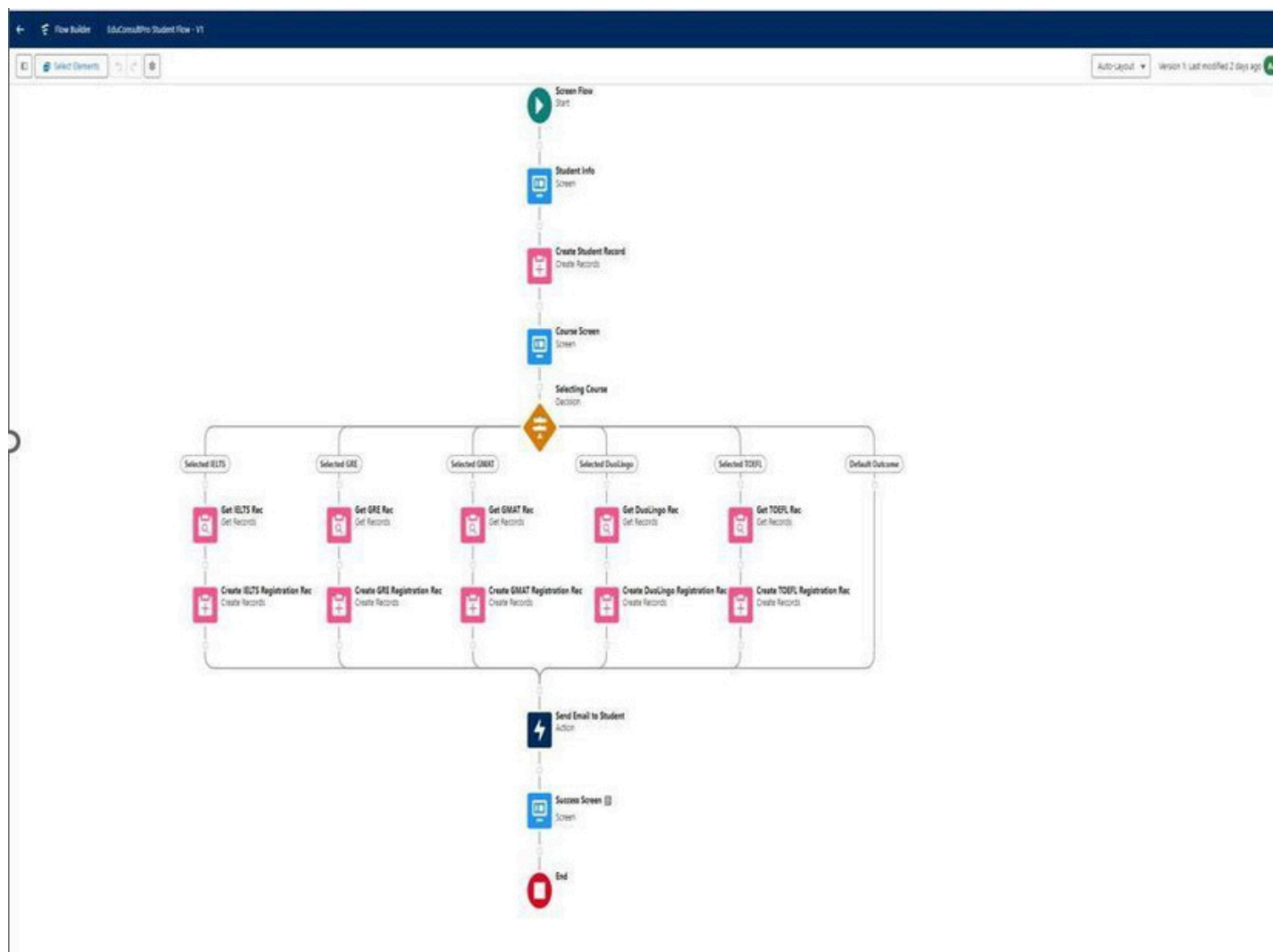
Next, I developed a Create element named "Create Student Record" to enable saving the student record input to the Salesforce database. Then I included a "Course Screen" by including a second Screen element. The primary choice found in the screen is a picklist named "Select Course". The course options that may be selected are IELTS, GRE, GMAT, Duolingo, and TOEFL.

Added a Decision element known as "Selecting Course" to manage course selection. This checks the course selected and then directs the flow of action regarding the selection. Based on the selection made, under the condition of the choice, a Get Record element gets the related course record from the "Course" object so that registration is done correctly.

After collecting the course data that was needed, a Create Records element was leveraged to make a registration record in the "Registration" object, associating the selected course with all the information that student gave to me. I then made Text Template Resources for the body and subject of the email to add the message that would be sent to the student ensuring that they had properly registered and sought to join the platform.

I then added an Action element titled "Send Email to Student" for sending this email—including the capability to fill in the email with provided student details any time the process is run. To exit the process system, I added an Screen element titled "Success Screen" and then added a message, "Registration has been completed successfully," with advice to students to check their emails for details. This flow will be named hence: "EduConsultPro Student Flow."

Screenshot:



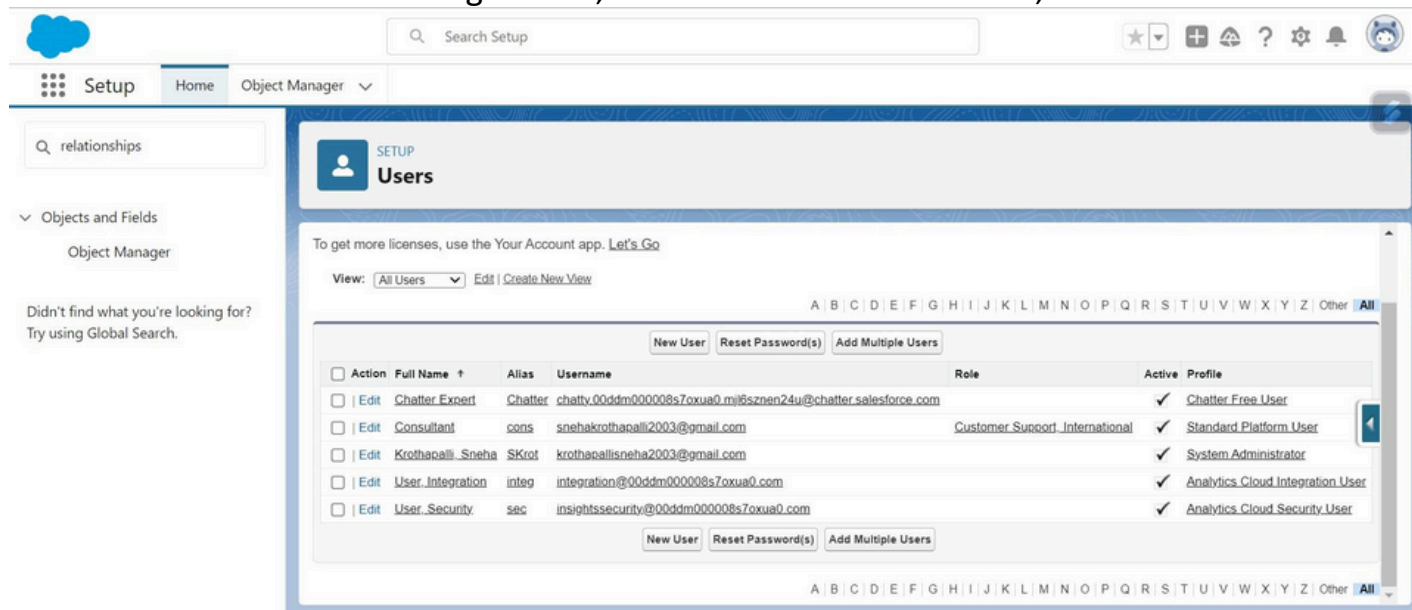
EduConsultPro Student Flow

Task3

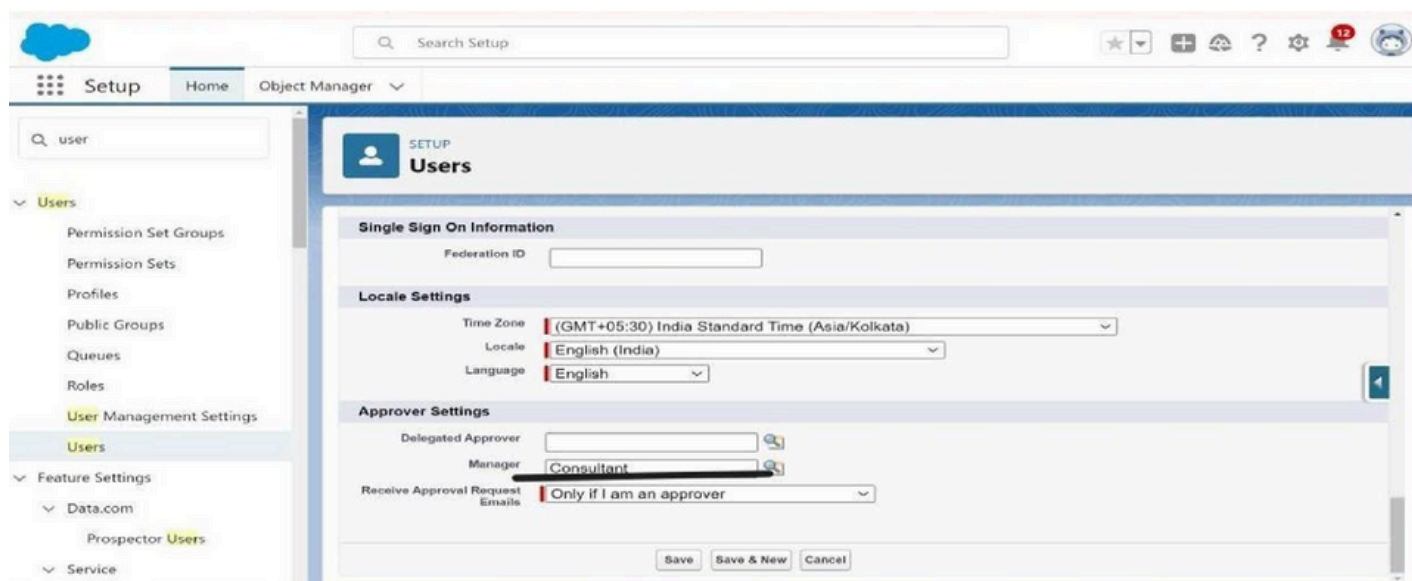
Create Users

Created new user in Salesforce by navigating to Setup→Administrative→Users→New User. Entered "Consultant" for the second name and entered "Salesforce Platform" as the license type. I applied the profile "Standard Platform User," checked all required fields for data, and saved the record of the new user.

Configured user settings: Browse to Setup → Administration → Users → Edit the user profile Scrolled down to the Approver Settings section, Selected "Consultant" in the Manager Field, At the bottom of the screen, click Save.



User



Configure the User Settings

Task4

Create an Approval Process for Property

Object

Created email template in Salesforce. From Setup, I input "Templates" in the Quick Find box and clicked on "Lightning Email Templates", and clicked the toggle to on. Opened the App Launcher, searched for "Email Templates" from the search box, and saved. Created a new folder with the desired name. Created a new email Template and selected the new created folder. The specified text got pasted into the HTML Value to create this, in my case, "Submission Template" Designed two more email templates for approving and rejecting requests, ditto the first one.

Earlier, I did set up the approval process. I went to Setup and typed "Approval" in the Quick Find box, and clicked on "Approval Processes." I selected to manage approval processes for "Appointment" and clicked "Create New Approval Process" using the Jump Start Wizard. I named the process "Appointment Approval" and under the approver settings, I used the setting "Option Automatically assign an approver using a standard or custom hierarchy field" of "Manager." I set the "Next Automated Approver Determined By" field to "Manager."

Made the following changes to the Record Editability Properties: Prepended "Administrator OR the currently assigned approver" to the list Saved the process and checked out the form Made a new Field Update under the Initial Submission Actions with Name "Submitted" and configured it to make the update to the field "Appointment: Status" with "Pending"

Also created a new Email Alert type "Submission Email Alert," auto-populate the Unique Name, selected the "Submission Template" Email Template, selected the recipient type to the user's Name. Repeated that for the Final Approval and Final Rejection actions and set those two up the same way.

Screenshots:

The screenshot shows the 'Email Templates' section of a CRM application. The top navigation bar includes a search bar and various icons. The left sidebar lists navigation options: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and Email Templates (selected). The main content area displays a table of recent email templates. The table has columns for Email Template Name, Description, Folder, Last Modified By, and Last Modified Date. Three templates are listed: 'Student Rejection Template', 'Student Approval template', and 'Request Template', all created by 'Sneha Krothapalli' on 7/8/2024.

EMAIL TEMPLATES	Email Template Name	Description	Folder	Last Modified By	Last Modified Date
Recent	Student Rejection Template		desired name	Sneha Krothapalli	7/8/2024, 3:10 pm
Created by Me	Student Approval template		desired name	Sneha Krothapalli	7/8/2024, 3:08 pm
Private Email Templates	Request Template		desired name	Sneha Krothapalli	7/8/2024, 2:57 pm

Email Template

The screenshot shows the 'Approval Processes' section of a CRM application. The top navigation bar includes a search bar and various icons. The left sidebar lists navigation options: Setup, Home, Object Manager, and Approval Processes (selected). The main content area displays the 'Appointment: Appointment Approval' process definition. The process is active and managed by 'Manager of Record Submitter'. The process definition details include: Process Name (Appointment Approval), Unique Name (Appointment_Approval), Description, Entry Criteria, Record Editability (Administrator OR Current Approver), Approval Assignment Email Template, Initial Submitters (Appointment Owner), and Created By (Sneha Krothapalli, 07/08/2024, 3:14 pm). The process is modified by Sneha Krothapalli on 07/08/2024, 3:31 pm.

Process Definition Detail	
Process Name	Appointment Approval
Unique Name	Appointment_Approval
Description	
Entry Criteria	
Record Editability	Administrator OR Current Approver
Approval Assignment Email Template	
Initial Submitters	Appointment Owner
Created By	Sneha Krothapalli, 07/08/2024, 3:14 pm
Modified By	Sneha Krothapalli, 07/08/2024, 3:31 pm

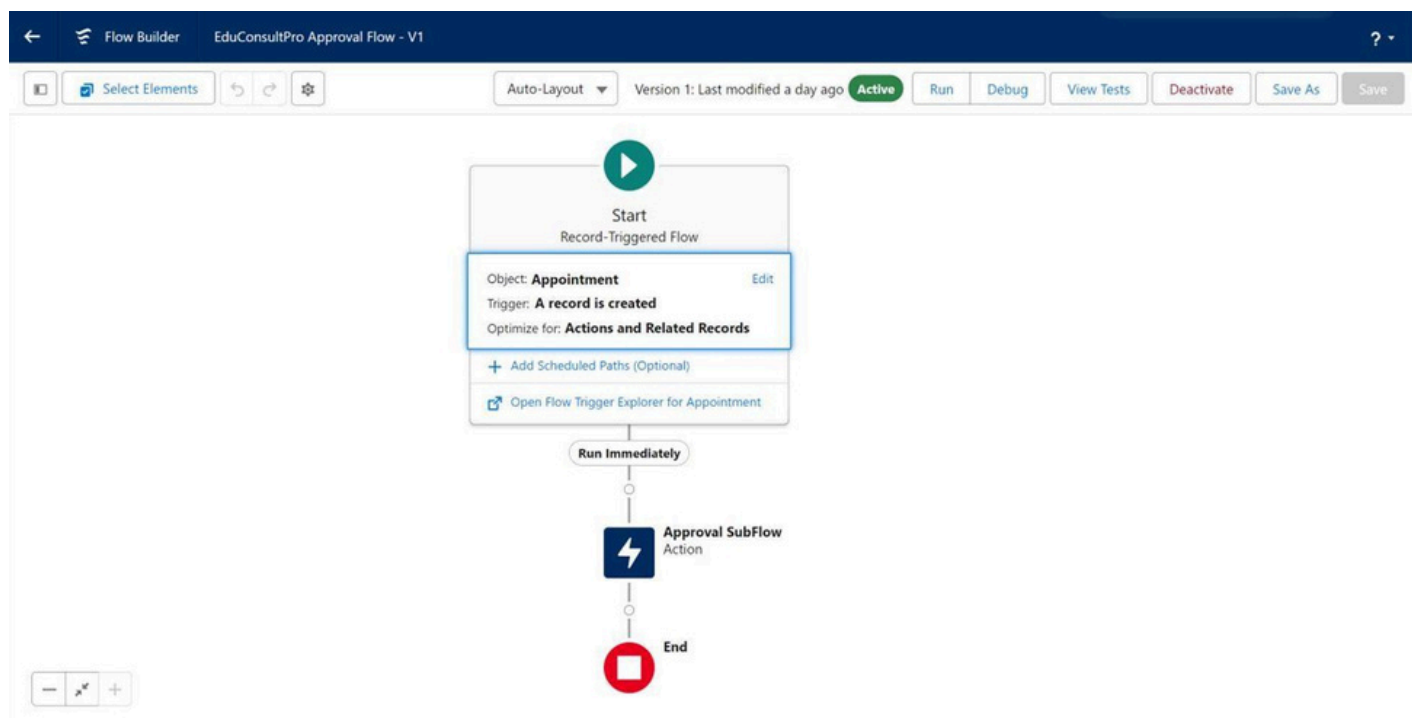
Approval Process

Task5

Create a Record Triggered Flow

Created a record-triggered flow in Salesforce for appointment approvals. Set the flow trigger to 'When a record is created' on an appointment record and added an action element that would submit the record for approval. Label this Action element as "Approval SubFlow" and set RecordId to "{!\$Record.Id}". At this point, the flow was saved with the label "EduConsultPro Approval Flow" and activated.

Screenshot:



EduConsultPro Approval Flow

Task6

Create a ScreenFlow for Existing Student to Book an Appointment

Configured an end-to-end flow in Salesforce for student appointments and cases management.

Added a Screen element called "Get Student Info" to collect the student's name and email, and added a GET Record element to retrieve student details depending on the name and email collected.

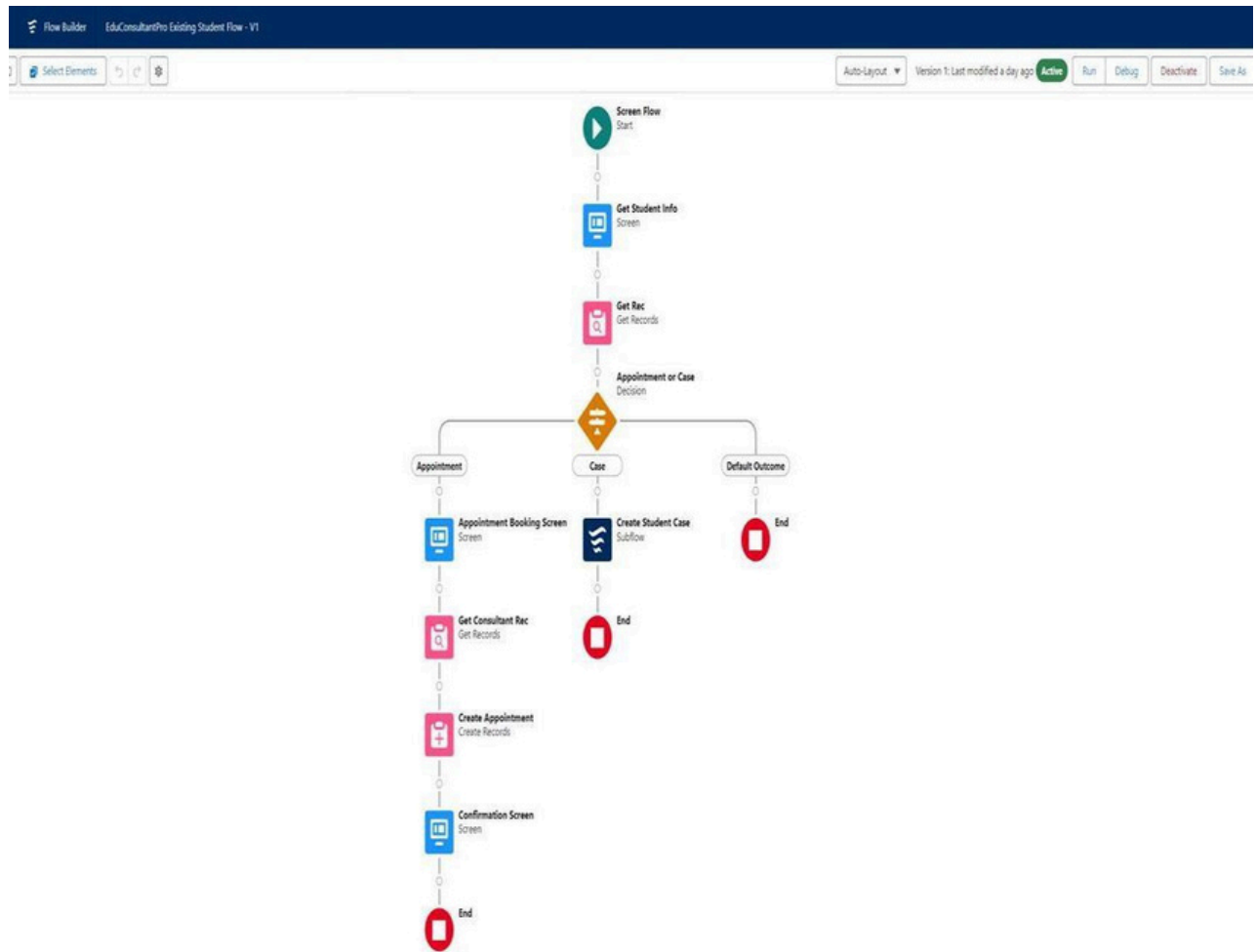
Added a Decision element to route between "Appointment" and "Case" depending upon the student's wishes. Added a Screen element labeled "Appointment Booking Screen" to gather details for appointments in case an appointment has been booked.

Inserted a GET Record element to obtain consultant details based on the selected name of the consultant. Applied a Create Records element to create a new appointment record with appropriate details.

Added a Screen element and named it "Confirmation Screen" to let the student see details of the appointment confirmation.

Added a Subflow element for case management and named it "Create Student Case" for creation of a case. Finally, save the flow as "EduConsultantPro Existing Student Flow" and prepare for deployment.

Screenshot :



EduConsultantPro Existing Student Flow

Create a ScreenFlow to Combine all the flows at one place

A new Screen Element in the flow was added labelled as "Welcome Screen". Inside this screen, a Display Text component was added and was labelled as "SuccessMessage."

Entered the given text into the Resource Picker box so that the welcome message by EduConsultantPro describes the services and support it provided. Added another Screen Element following the Welcome Screen, labeled "Existing or New Student Confirmation Screen."

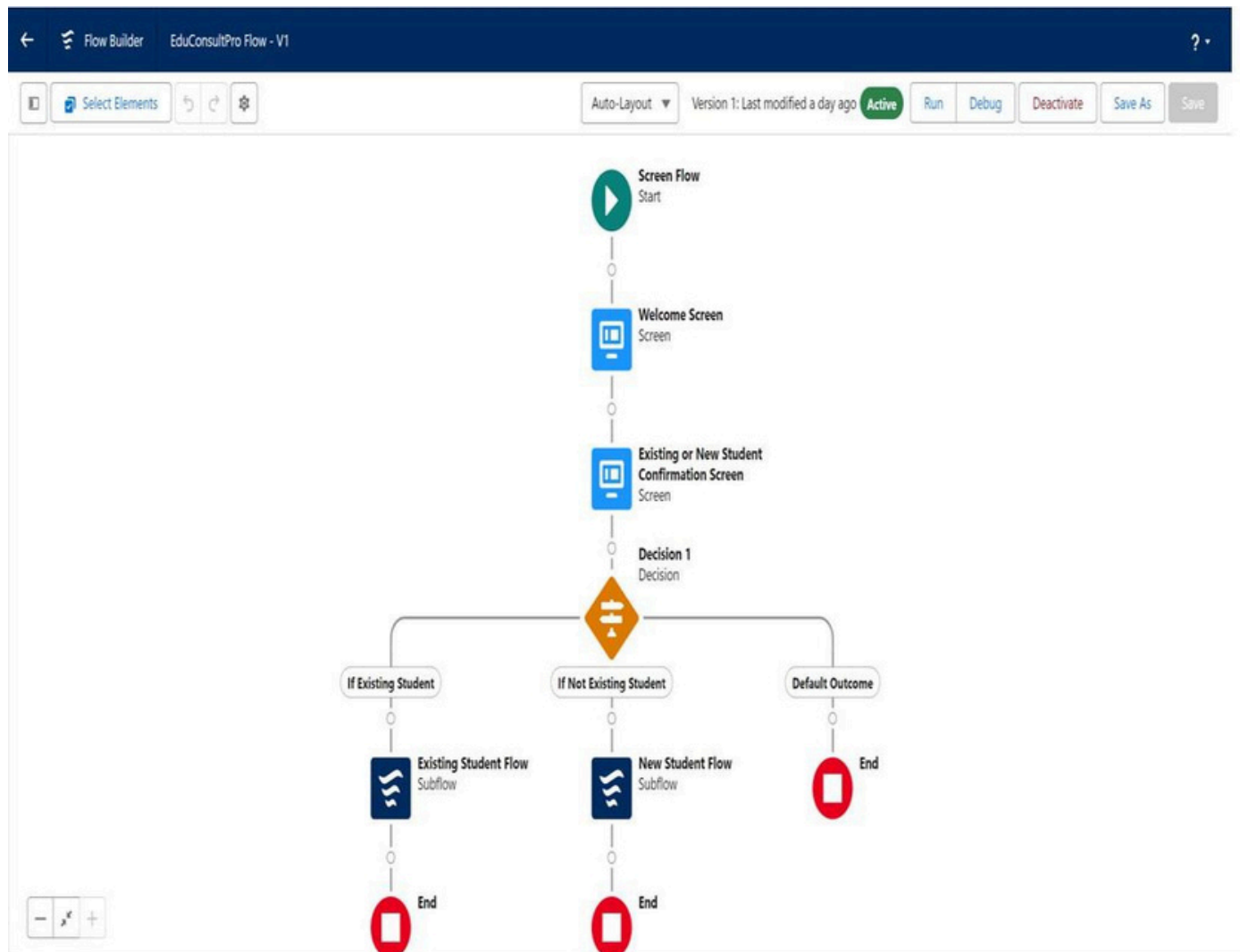
Added a Radio Button component with the label "Are you an Existing Student?" Created two choices: "Yes" and "No." Then added an Action Element of type Decision and named it "Decision 1," placing it next to the Existing or New Student Confirmation Screen. Set up the decision criteria with the outcome labeled "If Existing Student." The condition will be when the resource `{!Are_you_a_Existing_Student}` is equal to the value `{!Yes}`. Added the second outcome for "No."

Inserted a Subflow Element in the "If Existing Student" path and selected "EduConsultantPro Existing Student Flow" and labelled it as "Existing Student Flow." Saved the flow under the name "EduConsultantPro Existing Student Flow."

Inserted another Subflow Element in the "If Not an Existing Student" path, selecting the "EduConsultantPro Student Flow" and labeling it "New Student Flow." Saved this flow with the name "EduConsultPro Flow."

Finalized by saving the entire flow, naming it "EduConsultPro Flow."

Screenshot:

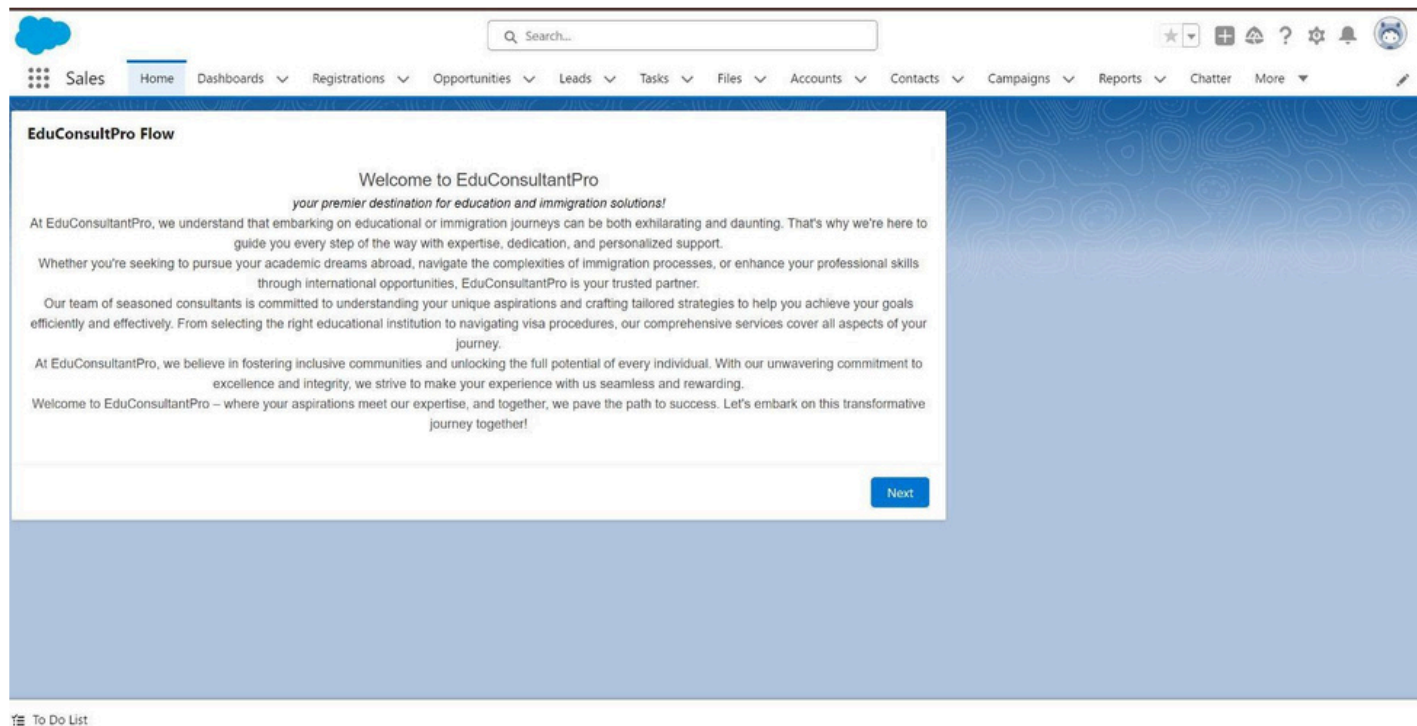


EduConsultPro Flow

Create a lightning app page

Created and configured a Lightning App Page named "EduConsultPro Home Page" using the Standard Home Page template. Placed the Flow component in the top-right region and incorporated the "EduConsultantPro Flow." Activated the page and assigned it to the Sales app and the System Administrator profile, ensuring it was available for the designated users.

Execution Screenshots:





Search...



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EduConsultPro Flow

Are you a Existing Student

- ☐ Yes
- ☒ No

Previous

Next

To Do List



Sales

Home

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Registrations

Opportunities

Leads

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Files

Accounts

Contacts

Campaigns

Reports

Chatter

More

Search...



EduConsultPro Flow

First Name	Sneha
Last Name	Krothapalli
Gender	Female
Student	Update Status to Approved
Phone	7013064210
Qualification	BTech
Student Name	Sneha
University Name	

Recent Cases

00001026

+ New Case



Sales Home Dashboards Registrations Opportunities Leads Tasks Files Accounts Contacts Campaigns Reports Chatter More

EduConsultPro Flow

First Name	Sneha
Last Name	Krothapalli
Gender	Female
Student	Update Status to Approved
Phone	7013064210
Qualification	BTech
Student Name	Sneha
University Name	

Recent Cases

00001026

+ New Case



Sales

Home

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More ▾

Search...



EduConsultPro Flow

Select Course

--None--

Previous

Next

To Do List



Sales

Home

Dashboards

Registrations

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Reports

Chatter

More

Search...



EduConsultPro Flow

Select Course

--None--

--None--

IELTS

GRE

GMAT

Duolingo

TOEFL

To Do List



Q Search...



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Opportunities ▾

Leads ▾

Tasks ▾

Files ▾

Accounts ▾

Contacts ▾

Campaigns ▾

Reports ▾

Chatter

More ▾



EduConsultPro Flow

Previous

Finish

To Do List

THANKYOU