SB8067 – SALESFORCE DEVELOPER

CRM APPLICATION FOR INSTITUTION

A PROJECT REPORT

Submitted by

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OF

BACHELOR OF TECHNOLOGY in ARTIFICIAL INTELLIGENCE AND DATA SCIENCE

JAI SHRIRAM ENGINEERING COLLEGETIRUPPUR –638 660

DECEMBER -2024

BONAFIDE CERTIFICATE

Certified that this project report **A CRM APPLICATION TO MANAGE THE SERVICES OFFERED BY AN INSTITUTION** is the bonafide work of **“Bharath suriya,Tamil Selvan,Niranjan venkatesh”** who carried out the project work under my supervision.

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INTERNAL EXAMINER **EXTERNAL EXAMINER**

A CRM APPLICATION TO MANAGE THE SERVICES OFFERED BY AN INSTITUTION

EduConsultPro Institute is a prominent educational institution that offers a wide range of courses and programs every year to an increasing number of prospective students. To maintain its leadership in the education sector, the institute needs a more effective system to manage the growing demands of admissions, student inquiries, and expert consulting services.

This project involves creating a **comprehensive CRM application using Salesforce** that will help streamline these processes and improve the experience for both students and admissions staff. The goal is to enhance operational efficiencies and increase throughput in the admission process through consulting services.

The project will involve:

- **Develop a User-Friendly Admission System**:
    - Enable online application submissions for prospective students, with **automated notifications** and **detailed reporting** for admissions staff.
- **Create an Efficient Approval Workflow**:
    - Implement a streamlined, **automated approval process** for consulting requests, including **email alerts** and easy tracking of submission statuses.
- **Manage Consulting Services**:
    - Allow students to **request consultations**, **schedule appointments**, and **track service statuses** within Salesforce, ensuring smooth service delivery.
- **Handle Immigration Cases**:
    - Enable students to **initiate immigration cases**, manage related documents, and **track case progress** with integrated tools and workflows.

Task 1: Create Objects from Spreadsheet

Objective:

- Enhance services management at EduConsultPro Institute by leveraging **Salesforce** to create objects directly from spreadsheets.
- This approach simplifies the integration of existing data into Salesforce, making it easier for the institute to manage and track various requirements.

Objects Created:

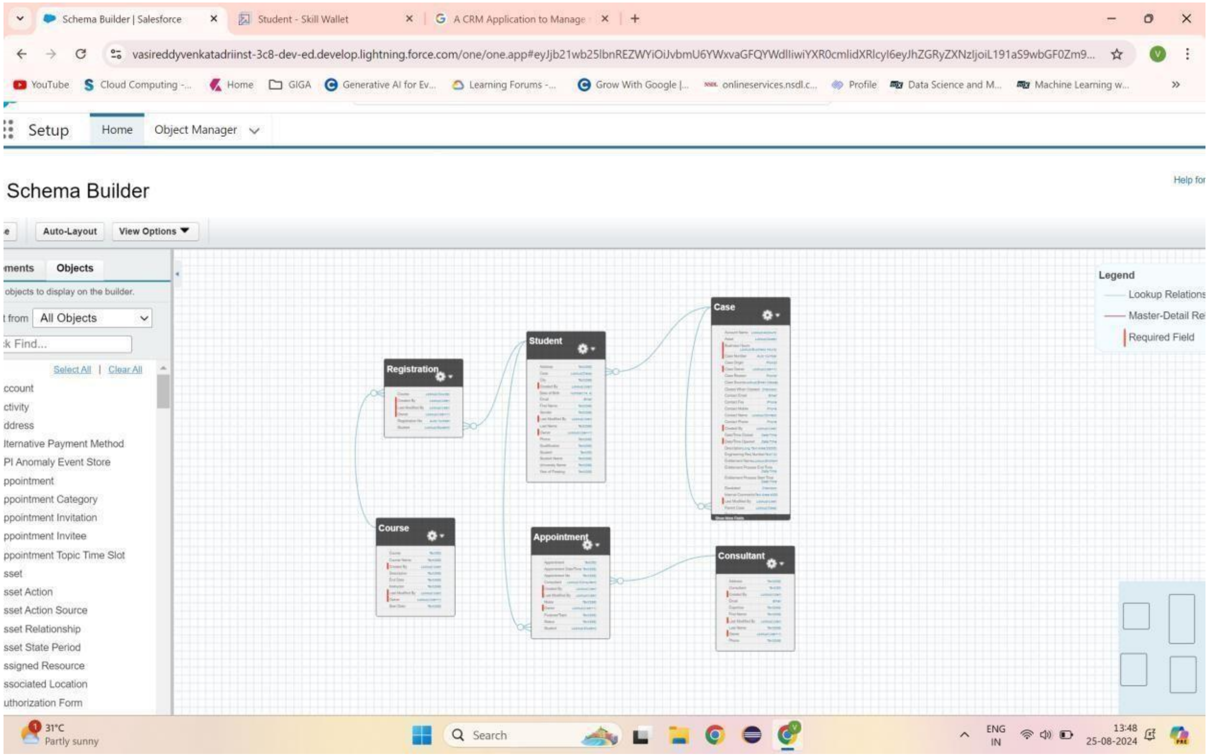
1. **Course, Consultant, Student, and Appointment**:
   - These are key objects designed to represent core functions of the institution (such as courses, consultants, students, and appointments).
   - **Lookup relationships** were established between:
     - **Appointment and Student**
     - **Appointment and Consultant**
   - These relationships ensure smooth data navigation and integrity, allowing seamless interaction between the objects.
2. **Registration Object**:
   - A new **Registration** object was created to manage student and course information.
   - A **lookup relationship** was set up between the **Student** and **Case** objects, particularly to handle immigration or visa applications related to student queries.

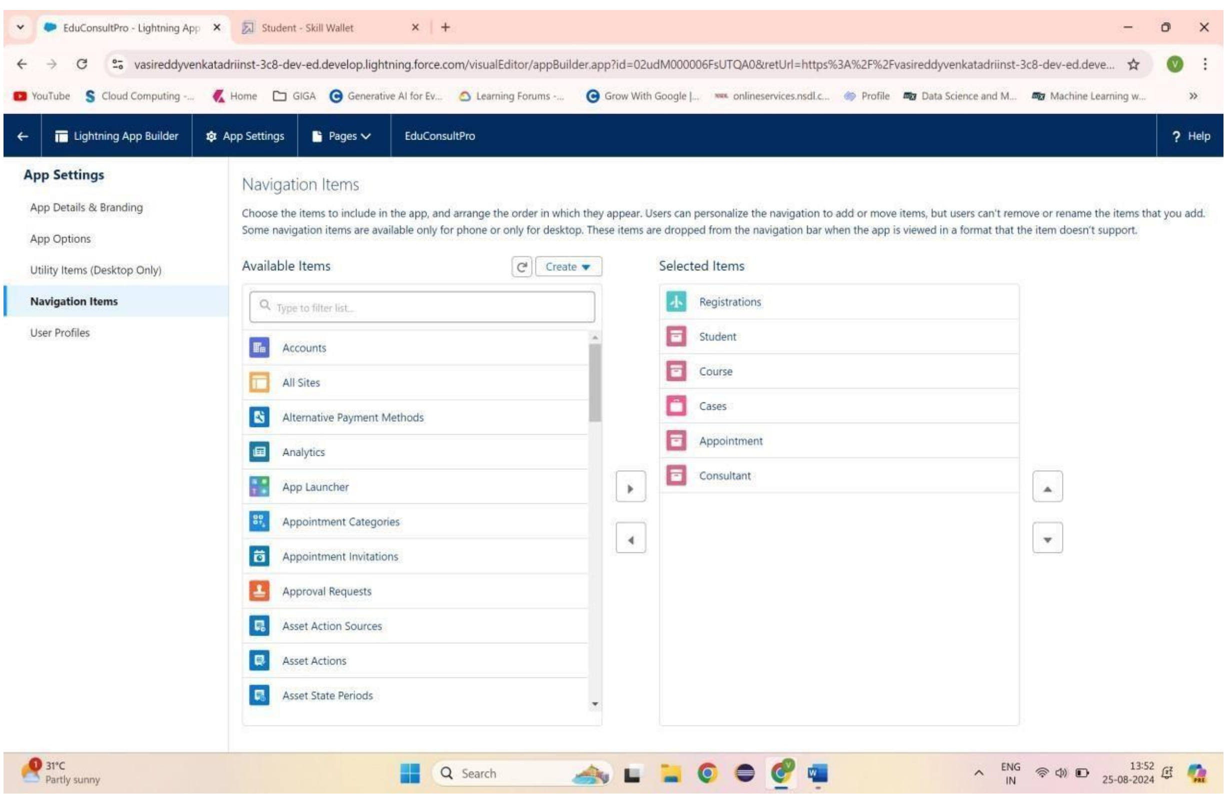
Customization and Configuration:

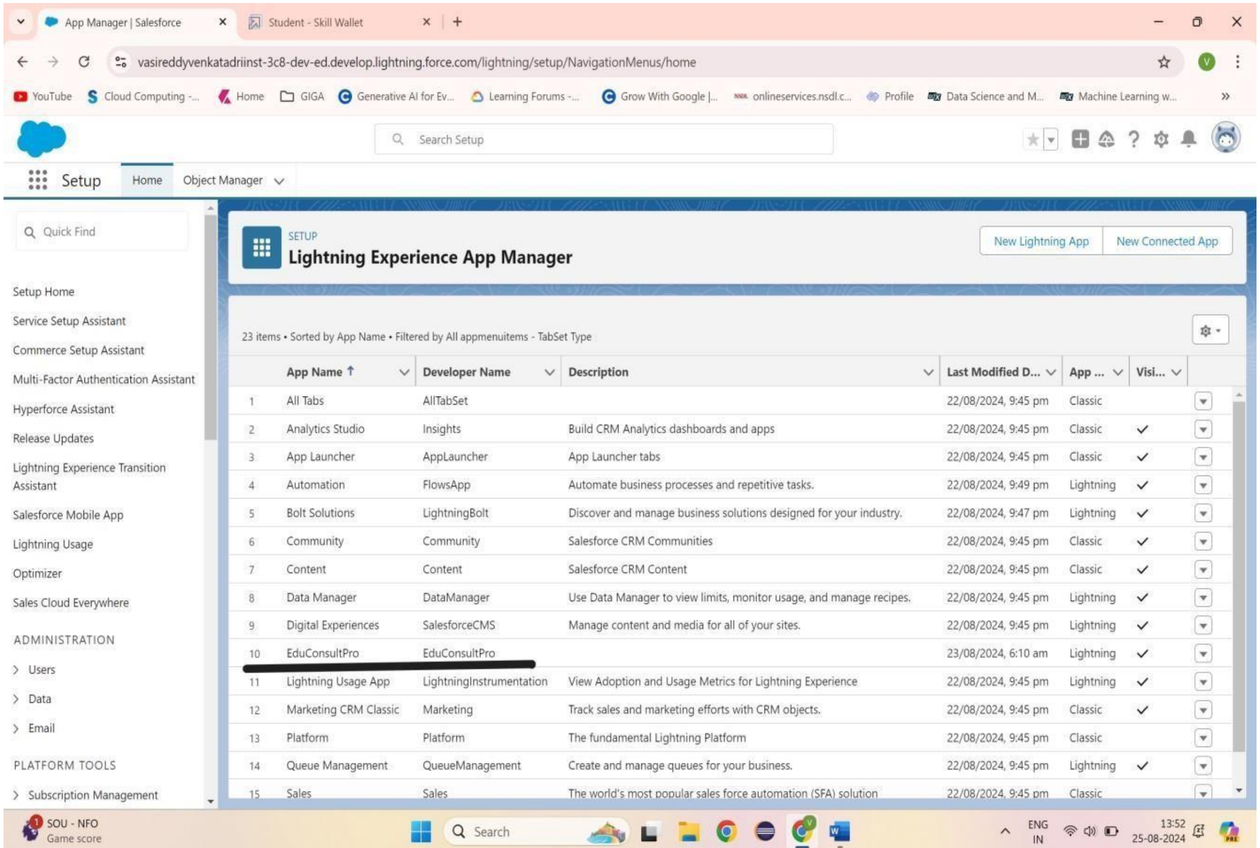
- The **Case object** was further customized by defining specific values for certain fields:
  - **Type** field: Options include **Immigration** and **Visa Application**.
  - **Status** field: Options include **Open** and **In Progress**.
- After creating these objects, **Tabs** were generated for easy access to each object (such as Course, Consultant, Registration, etc.).

New Lightning Application:

- A **new Lightning application**, called **EduConsultPro**, was developed to bring everything together:
  - Features included **Home**, **Students**, **Courses**, **Advisers**, **Appointments**, **Registrations**, and **Cases**.
  - The interface was designed with a strong focus on **user experience**, particularly for system administrators and staff members.



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2 Analytics Studio Insights Build CRM Analytics dashboards and apps 22/08/2024, 9:45 pm Classic
3 App Launcher AppLauncher App Launcher tabs 22/08/2024, 9:45 pm Classic
4 Automation FlowsApp Automate business processes and repetitive tasks. 22/08/2024, 9:49 pm Lightning
5 Bolt Solutions LightningBolt Discover and manage business solutions designed for your industry. 22/08/2024, 9:47 pm Lightning
6 Community Community Salesforce CRM Communities 22/08/2024, 9:45 pm Classic
7 Content Content Salesforce CRM Content 22/08/2024, 9:45 pm Classic
8 Data Manager DataManager Use Data Manager to view limits, monitor usage, and manage recipes. 22/08/2024, 9:45 pm Lightning
9 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 22/08/2024, 9:45 pm Lightning
10 EduConsultPro EduConsultPro 23/08/2024, 6:10 am Lightning
11 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 22/08/2024, 9:45 pm Lightning
12 Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects. 22/08/2024, 9:45 pm Classic
13 Platform Platform The fundamental Lightning Platform 22/08/2024, 9:45 pm Classic
14 Queue Management QueueManagement Create and manage queues for your business. 22/08/2024, 9:45 pm Lightning
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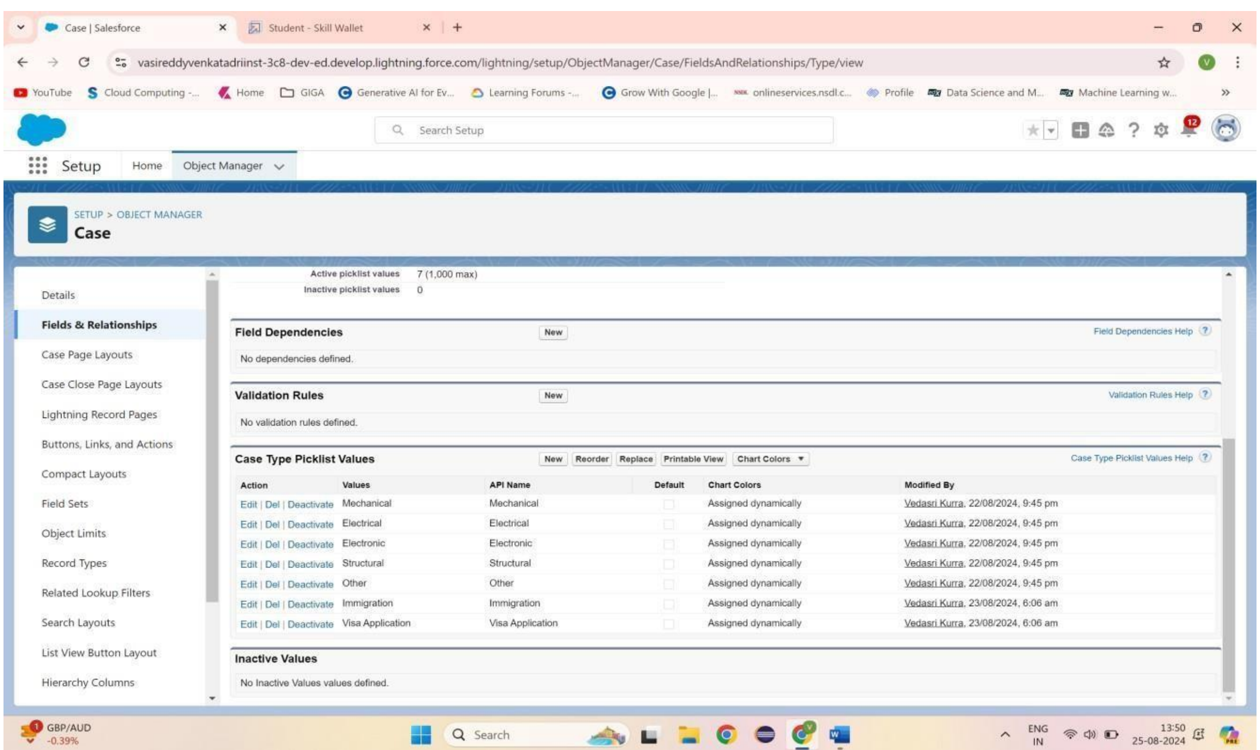
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Student - Skill Wallet
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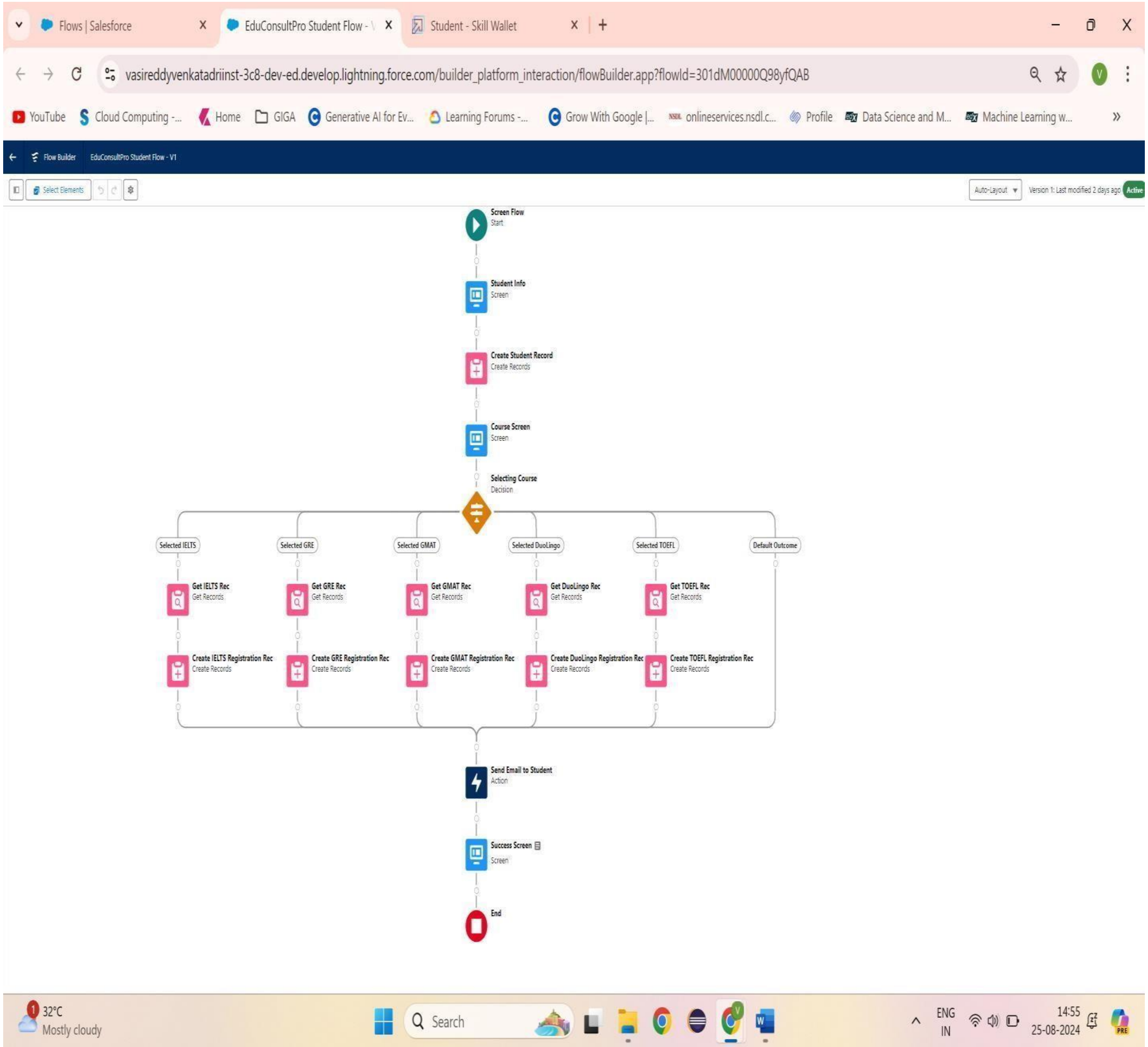
Task 2: Create a ScreenFlow for Student Admission Application Process

The **EduConsultPro Student Flow** was created to simplify and streamline the student registration process. This flow offers a **user-friendly interface** for students to submit their admission applications with ease.

Key Elements of the Flow:

1. **Student Info Screen**:
   - A **Screen element** called "Student Info" was added to collect all student-related details.
   - A **record variable** named **StudentRecordRes** was created to handle the student data and display the relevant fields from the **Student** object in a clean and light interface.
2. **Create Student Record**:
   - A **Create Record element** named "Create Student Record" was developed to save the student's information into Salesforce, ensuring that all student data is captured accurately.
3. **Course Selection Screen**:
   - A second **Screen element** called "Course Screen" was added.
   - The main feature in this screen is a **picklist** named "Select Course," with options for students to choose their desired course:
     - IELTS
     - GRE
     - GMAT
     - Duolingo
     - TOEFL
4. **Course Selection Decision**:
   - A **Decision element** called "Selecting Course" was added to guide the flow based on the course the student selects.
   - Depending on the selection, a **Get Record** element fetches the relevant course record from the **Course** object to ensure accurate registration.
5. **Create Registration Record**:
   - Once the course data is collected, a **Create Records** element is used to create a **Registration** record in the **Registration** object.
   - This links the student's information with the selected course.
6. **Send Confirmation Email**:
   - Text Templates were created for the **email subject** and **body**, which includes the registration confirmation message for the student.
   - An **Action element** titled "Send Email to Student" is added to send the confirmation email automatically, using the student's details entered during the flow.
7. **Success Screen**:
   - A **Success Screen** is displayed at the end of the process.
   - The message shown to the student reads: "Registration has been completed successfully. Please check your email for details."



Task 3: Create Users in Salesforce

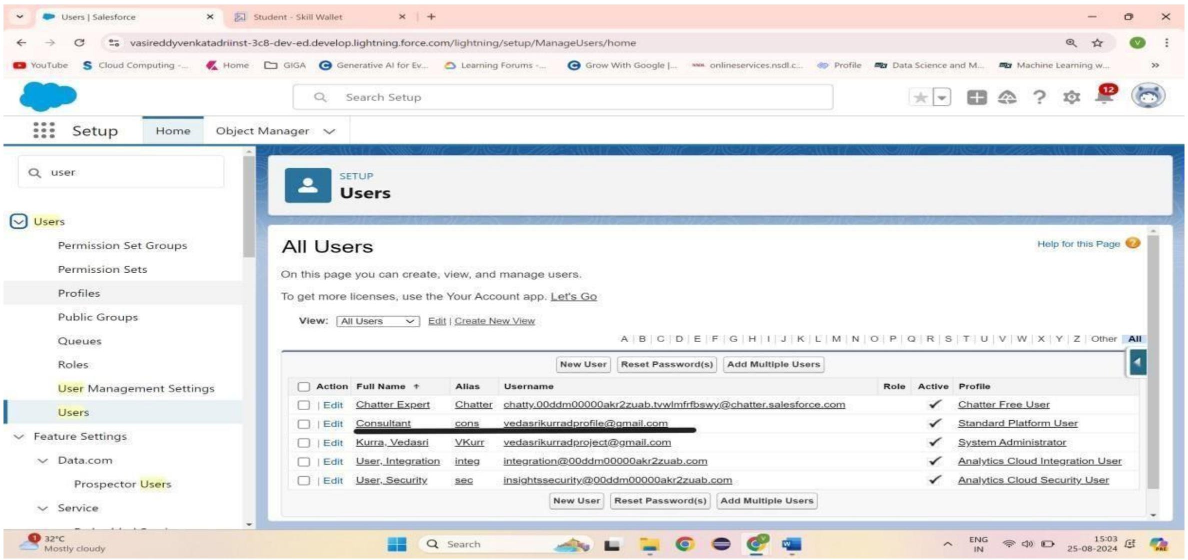
Step 1: Create a New User

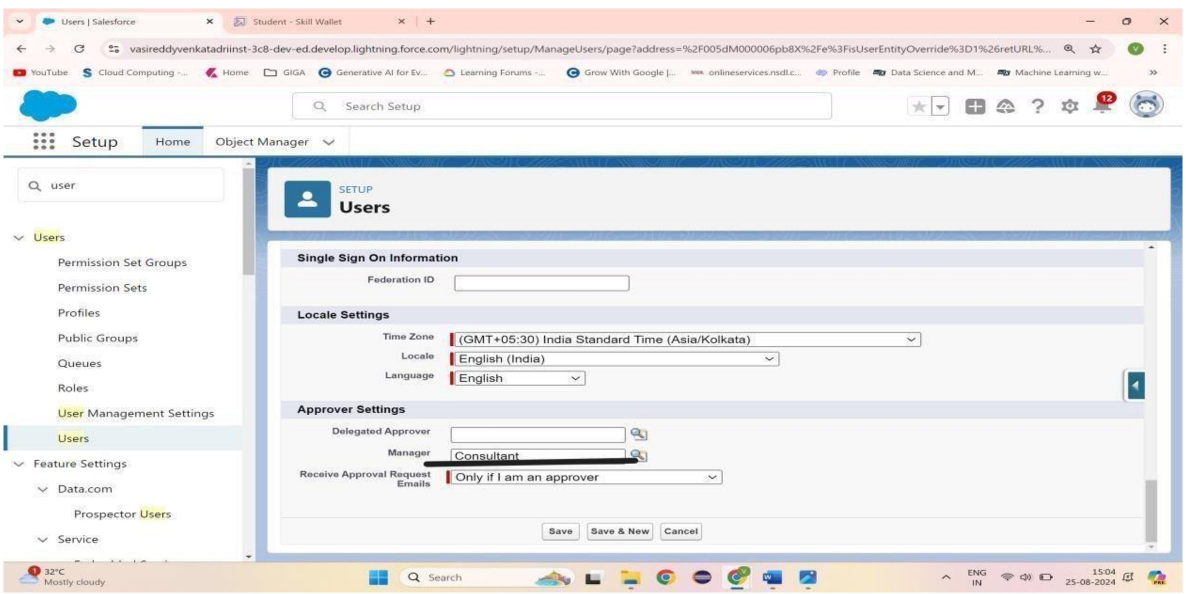
1. Navigate to **Setup** → **Administration** → **Users** → **New User**.
2. Enter the following details for the new user:
   - **Last Name**: "Consultant"
   - **License Type**: "Salesforce Platform"
   - **Profile**: Choose the **"Standard Platform User"** profile.
3. Ensure all required fields are filled correctly.

4. Save the new user record.

Step 2: Configure User Settings

1. Go to **Setup → Administration → Users → Edit User Profile**.
2. Scroll down to the **Approver Settings** section.
3. In the **Manager** field, select **"Consultant"**.
4. At the bottom of the screen, click **Save** to apply the changes.





Task 4: Create an Approval Process for the Property Object

Step 1: Create Email Templates

1. **Navigate to Email Templates**:
   - Go to **Setup** → Type **"Templates"** in the **Quick Find** box and select **"Lightning Email Templates"**.
   - Toggle the setting to **"On"**.
   - Open the **App Launcher**, search for **"Email Templates"**, and open it.
   - Create a **new folder** to store your email templates.
2. **Create Email Template**:
   - Create a new **Email Template** and select the newly created folder.
   - Paste the required content (in this case, for "Submission Template") into the **HTML value** section.
3. **Create Additional Email Templates**:
   - Create two more templates for **Approving** and **Rejecting** requests, following the same steps as the first template.

Step 2: Set Up the Approval Process

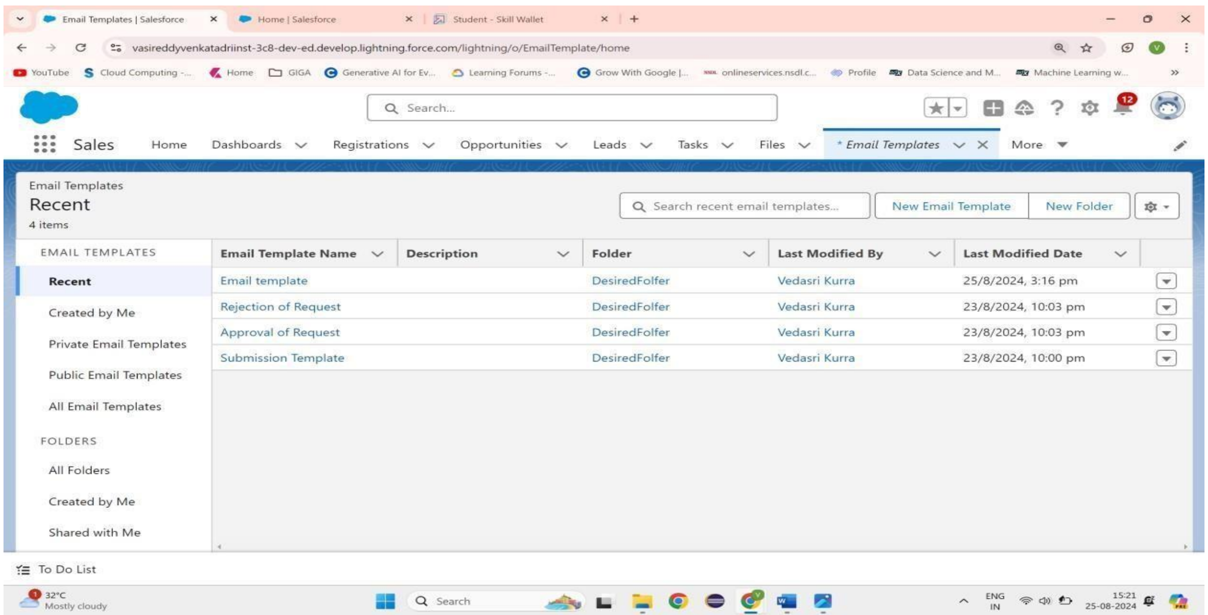
1. **Navigate to Approval Processes**:
   - Go to **Setup**, type **"Approval"** in the **Quick Find** box, and select **"Approval Processes"**.
2. **Create Approval Process**:
   - Select **Appointment** to manage the approval process and click **"Create New Approval Process"** using the **Jump Start Wizard**.
   - Name the process **"Appointment Approval"**.
3. **Define Approver Settings**:
   - For **Approver Settings**, choose the option: **"Automatically assign an approver using a standard or custom hierarchy field"**.
   - Set **Manager** as the approver by choosing the **"Manager"** hierarchy field.
   - Set the **"Next Automated Approver"** to be determined by **Manager**.

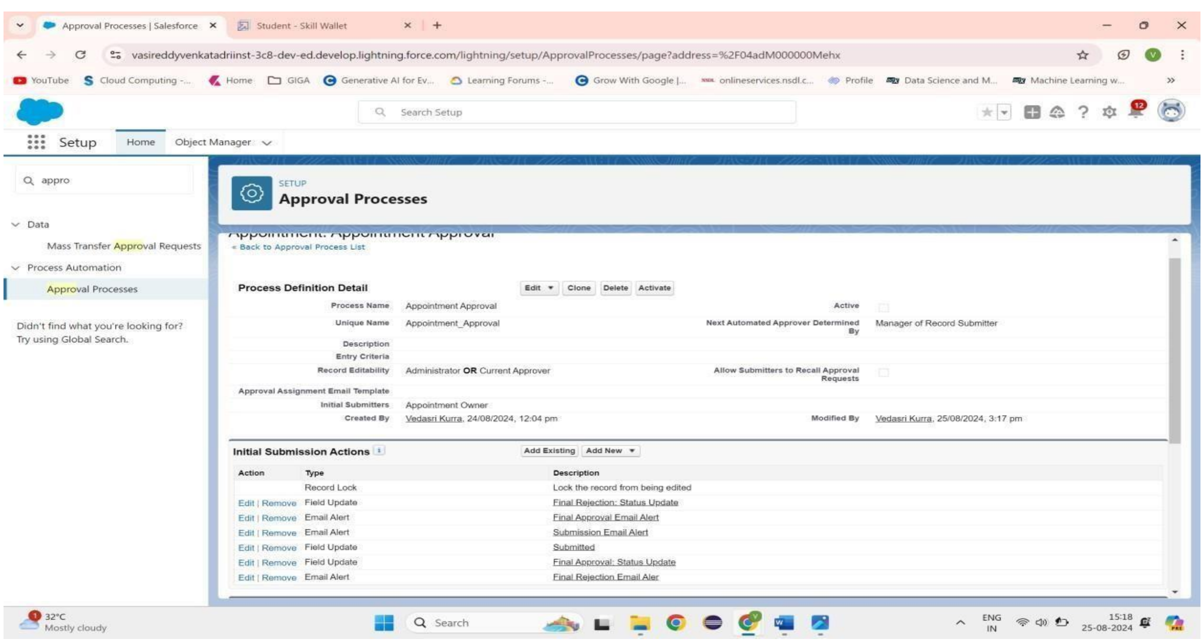
Step 3: Configure Record Editability and Field Updates

1. **Record Editability**:
   - Update the **Record Editability Properties** by prepending: **"Administrator OR the currently assigned approver"** to the list of edit permissions.
2. **Field Update on Submission**:
   - Under **Initial Submission Actions**, create a **Field Update** with the name **"Submitted"**.
   - Set this field to update the **"Appointment: Status"** field to **"Pending"** when the request is submitted.

Step 4: Set Up Email Alerts

1. **Create Email Alert for Submission**:
   - Create a new **Email Alert** action named **"Submission Email Alert"**.
   - Choose the **"Submission Template"** for the email template.
   - Set the **Recipient Type** to **User's Name**.
2. **Set Up Email Alerts for Final Approval and Rejection**:
   - Repeat the same steps for creating email alerts for **Final Approval** and **Final Rejection** actions, using the respective templates for each.





Task 5: Create a Record Triggered Flow for Appointment Approvals

Step 1: Set Up the Flow

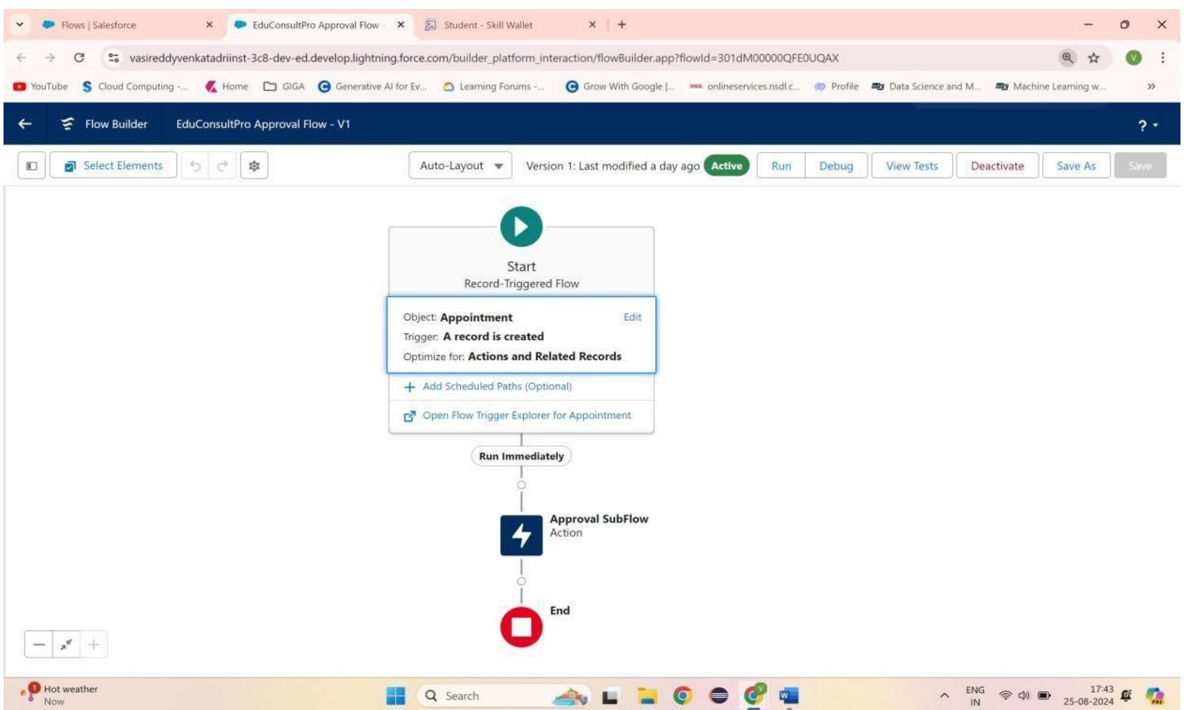
1. **Create a Record-Triggered Flow**:
   - In Salesforce, navigate to **Setup** and create a **Record-Triggered Flow**.
   - Set the **trigger** to **"When a record is created"** for the **Appointment** object.

Step 2: Add Action for Approval Submission

1. **Add Action Element**:
   - In the flow, add an **Action element** that will automatically submit the appointment record for approval once it's created.
   - Label this action element as **"Approval SubFlow"**.
2. **Set Record ID**:
   - Set the **RecordId** to **"{!$Record.Id}"** to link the flow to the specific appointment record that triggered the flow.

Step 3: Save and Activate the Flow

1. **Save the Flow**:
   - Name the flow **"EduConsultPro Approval Flow"**.
2. **Activate the Flow**:
   - Once you've configured everything, **activate** the flow to ensure it's working as intended.



Task 6: Create a ScreenFlow for Existing Student to Book an Appointment

Step 1: Configure the Flow

1. **Start with "Get Student Info" Screen**:
   - Create a **Screen element** called **"Get Student Info"** to collect the **student's name** and **email**.
   - Add a **GET Record element** to retrieve the student's details based on the name and email provided.

Step 2: Decision Element for Routing

1. **Add Decision Element**:
   - Add a **Decision element** to route the flow based on the student's choice:
     - If the student wants to book an **appointment**, proceed to the appointment booking screen.
     - If the student prefers to open a **case**, route to case management.

Step 3: Appointment Booking

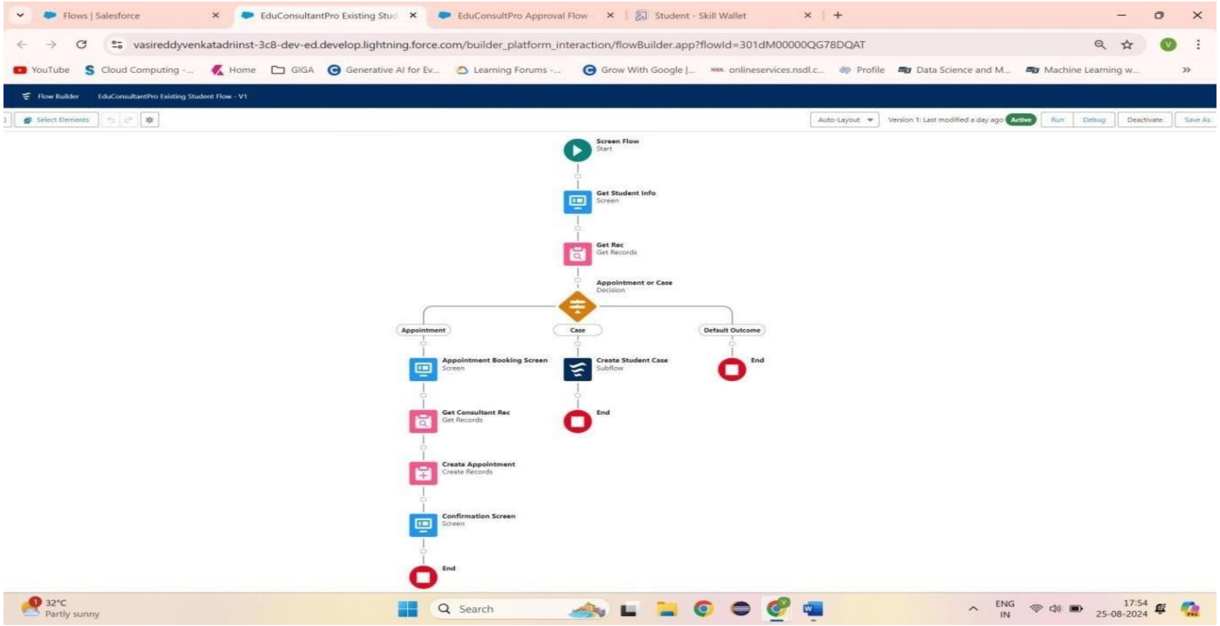
1. **Create "Appointment Booking Screen"**:
   - Add a **Screen element** named **"Appointment Booking Screen"** to gather details for the appointment if the student is booking one.
2. **Retrieve Consultant Information**:
   - Insert a **GET Record element** to retrieve the consultant's details based on the selected consultant's name.
3. **Create Appointment Record**:
   - Use a **Create Records element** to create a new **appointment record** with the details provided by the student.

Step 4: Confirmation and Case Management

1. **Confirmation Screen**:
   - Add a **Screen element** named **"Confirmation Screen"** to show the student the details of their **appointment confirmation**.
2. **Add Subflow for Case Management**:
   - Add a **Subflow element** called **"Create Student Case"** to manage the creation of a case if the student requested one instead of an appointment.

Step 5: Save and Prepare for Deployment

1. **Save the Flow**:
   - Name the flow **"EduConsultPro Existing Student Flow"**.
2. **Prepare for Deployment**:
   - Once everything is set up and tested, prepare the flow for deployment.



Task 6: Enhancing the Flow with Welcome Screen, Decision Logic, and Subflows

Step 1: Add "Welcome Screen"

1. **Create Screen Element:**
   - Add a new **Screen Element** called **"Welcome Screen"**.
   - Inside this screen, add a **Display Text component** with the label **"SuccessMessage"**.
   - Enter the given welcome message in the **Resource Picker box**. The message will describe the services and support provided by **EduConsultPro**.

Step 2: Add "Existing or New Student Confirmation Screen"

1. **Create Screen Element for Student Type Confirmation**:
   - Add another **Screen Element** after the **Welcome Screen**, labeled **"Existing or New Student Confirmation Screen"**.
   - Add a **Radio Button component** labeled **"Are you an Existing Student?"**.
   - Create two choices:
     - **Yes**
     - **No**

Step 3: Add Decision Logic

1. **Add Decision Element:**
   - Insert a **Decision Element** named **"Decision 1"**, placed next to the **Existing or New Student Confirmation Screen**.
   - Set up the decision logic to route based on the **Radio Button** selection:

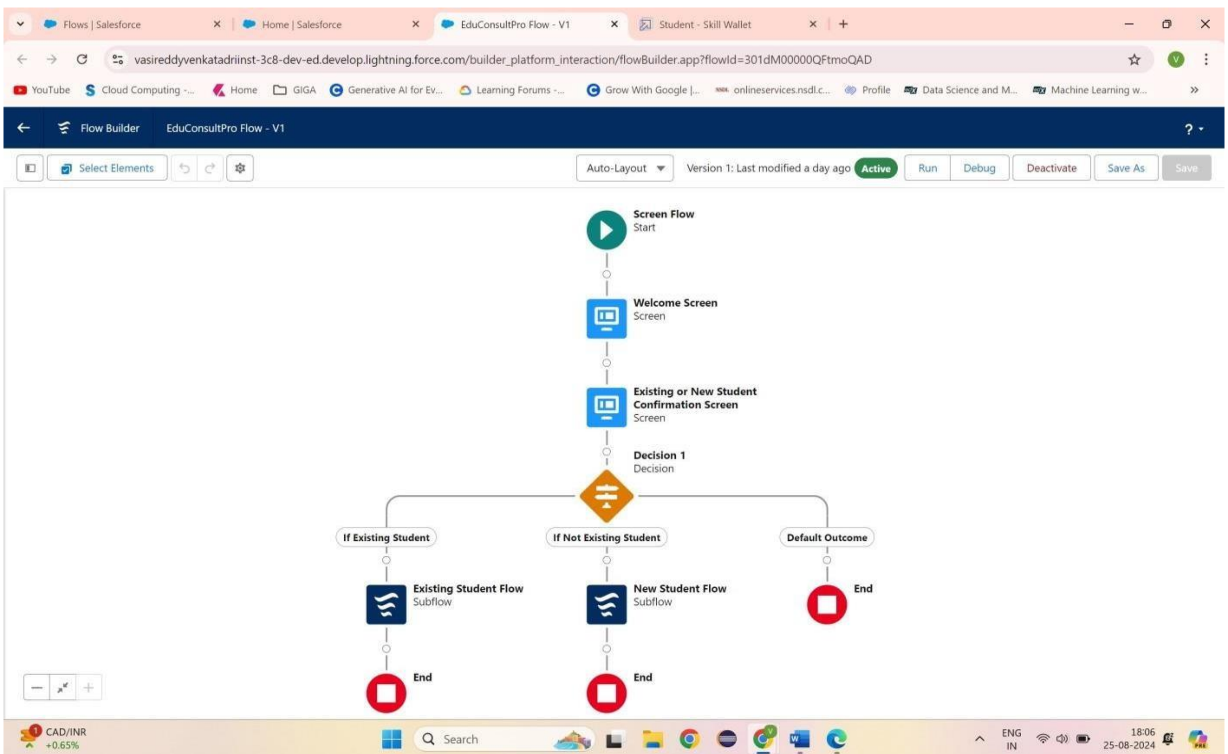
- **If Existing Student**: Set the condition to check if the value of **{!Are_you_a_Existing_Student}** equals **"Yes"**.
- **If Not an Existing Student**: Set the second outcome for when the value equals **"No"**.

Step 4: Add Subflows for Existing and New Students

1. **Subflow for Existing Students**:
   - In the **"If Existing Student"** path, add a **Subflow Element**.
   - Select the flow **"EduConsultPro Existing Student Flow"** and label it **"Existing Student Flow"**.
2. **Subflow for New Students**:
   - In the **"If Not an Existing Student"** path, add another **Subflow Element**.
   - Select the flow **"EduConsultPro Student Flow"** and label it **"New Student Flow"**.

Step 5: Save the Flow

1. **Save the Flow**:
   - Save the entire flow with the name **"EduConsultPro Flow"**.



Task: Create a Lightning App Page for EduConsultPro Home Page

Step 1: Create the Lightning App Page

1. **Navigate to Lightning App Builder**:
    - Go to **Setup** → Type **"App Builder"** in the Quick Find box and select **Lightning App Builder**.
2. **Create a New Page**:
    - Click **"New"** to create a new page.
    - Choose the **Standard Home Page** template for the page layout.

Step 2: Configure the App Page

1. **Name the Page**:
    - Name the new page **"EduConsultPro Home Page"**.
2. **Place Flow Component**:
    - In the page layout, drag and drop the **Flow component** into the **top-right region**.
    - Select the **"EduConsultPro Flow"** for the component.

Step 3: Activate the Page

1. **Activate the Page**:
    - Once the layout is complete, click **Activate** to make the page live.
2. **Assign Page to App and Profile**:
    - Assign the page to the **Sales app** and the **System Administrator profile**.
    - Ensure that the page is available to the appropriate users.