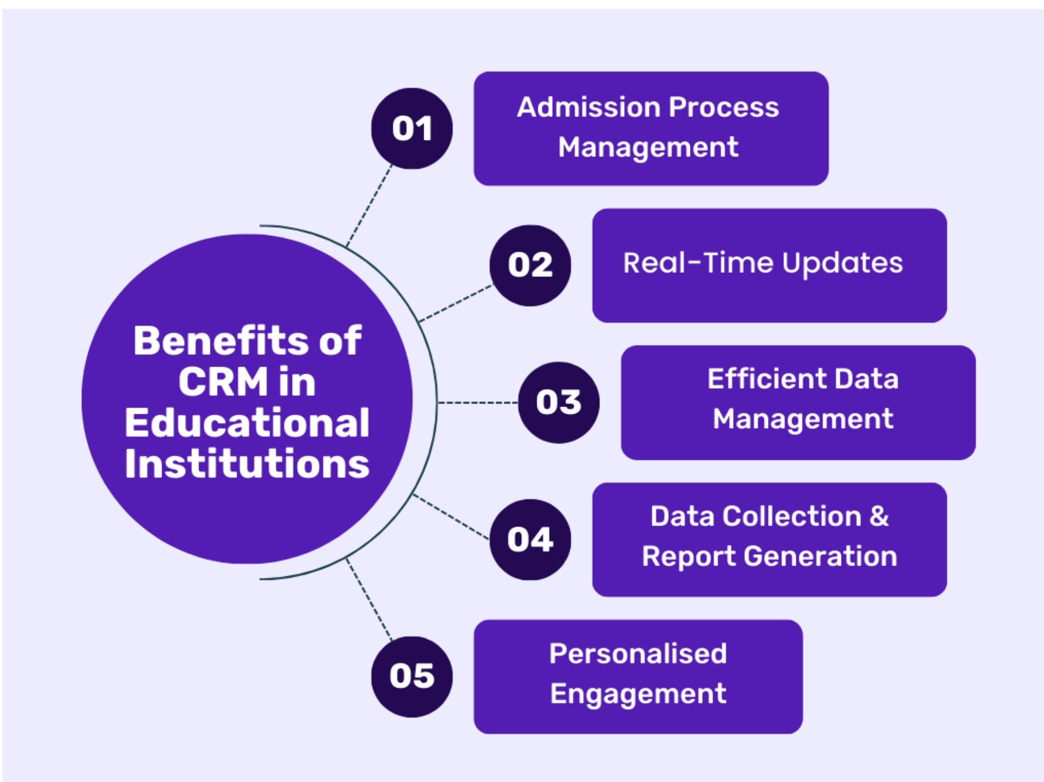
A CRM Application to Manage the Services Offered by an Institution
Institutional-Insight-CRM

Overview

A CRM (Customer Relationship Management) application designed for educational institutions streamlines various administrative and service-oriented tasks. Institutions, particularly those with large student populations, need a reliable way to manage interactions with prospective and current students. This CRM system enables institutions to organize admissions, inquiries, case handling, and appointment scheduling, ensuring a more organized and accessible structure for managing student and service data. Leveraging Salesforce CRM, this solution centralizes records and automates routine processes, resulting in enhanced operational efficiency, improved data accessibility, and better user experiences for students and staff alike.



key objectives of the crm application

Key Objectives of the CRM Application

1. **Simplify the Student Admission Process**

The CRM application provides a structured flow for managing student admissions, including gathering information, processing applications, and tracking admission status. By automating data entry and task tracking, the system reduces the workload on admissions staff and speeds up the process for applicants.

2. **Manage Student Inquiries and Service Appointments**

For both prospective and enrolled students, the CRM facilitates service management by creating streamlined channels for handling inquiries and scheduling appointments. This includes case creation for inquiries such as visa applications or academic advising, as well as booking services with consultants.

3. **Centralize Student and Service Records**

All student information, course data, and service interactions are stored in a centralized database within Salesforce. This improves accessibility and allows staff to manage student and course information efficiently, reducing duplication and ensuring up-to-date records across departments.

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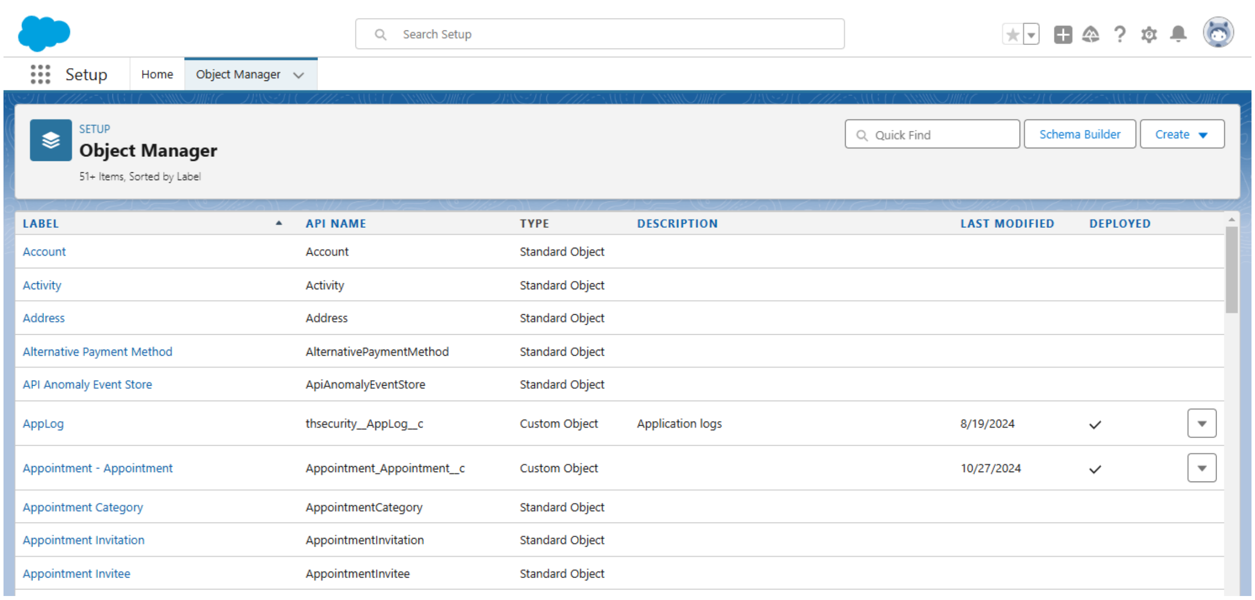
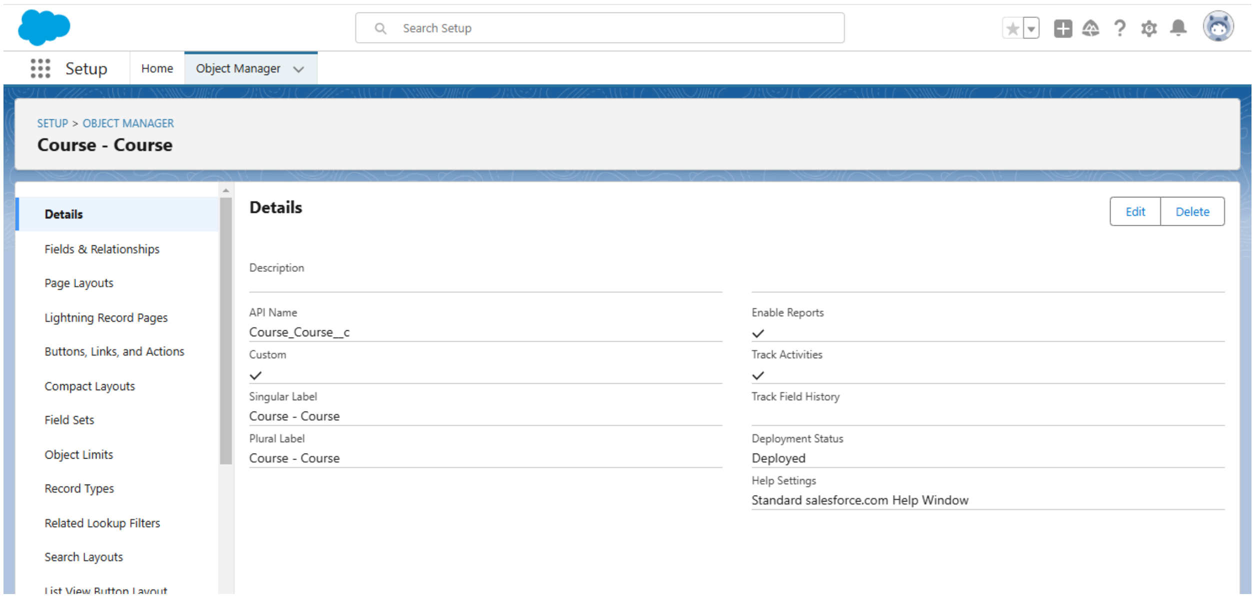
1. Create Objects from Spreadsheet



Creating objects from spreadsheets allows the CRM to structure essential data for easy management. This section focuses on setting up the core objects required for the institution's CRM, including courses, consultants, students, and appointments, each of which plays a specific role within the application.

1. **Create Course Object**

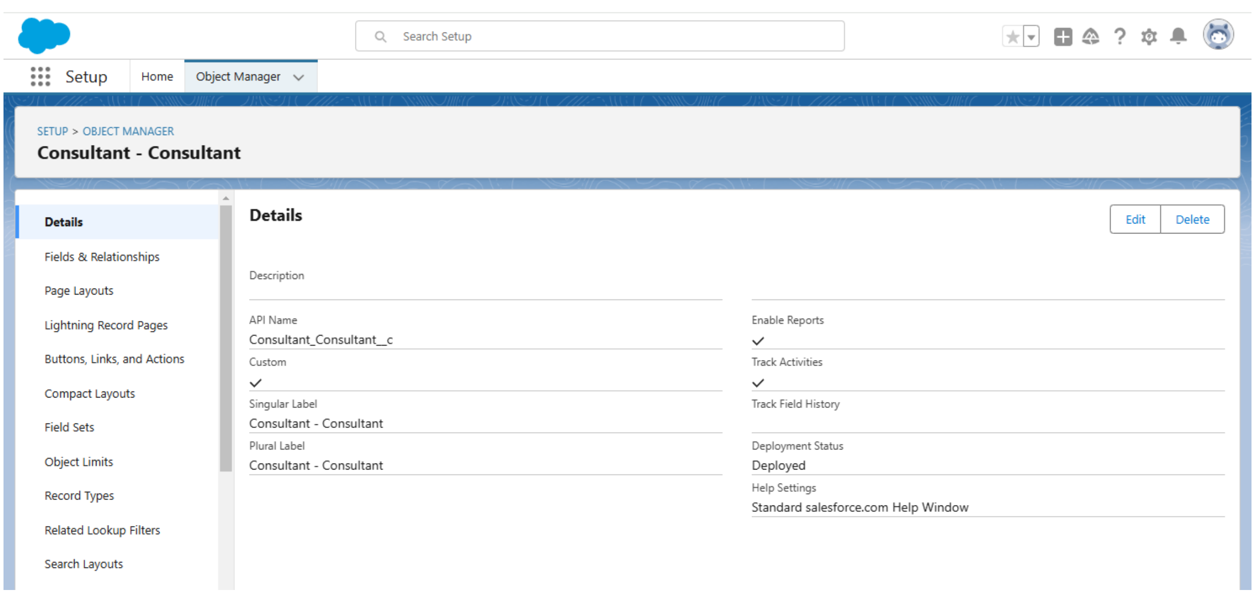
- The **Course** object stores data about the various courses offered by the institution. Information like course name, description, and prerequisites can be populated into Salesforce from a spreadsheet, making the import process efficient.



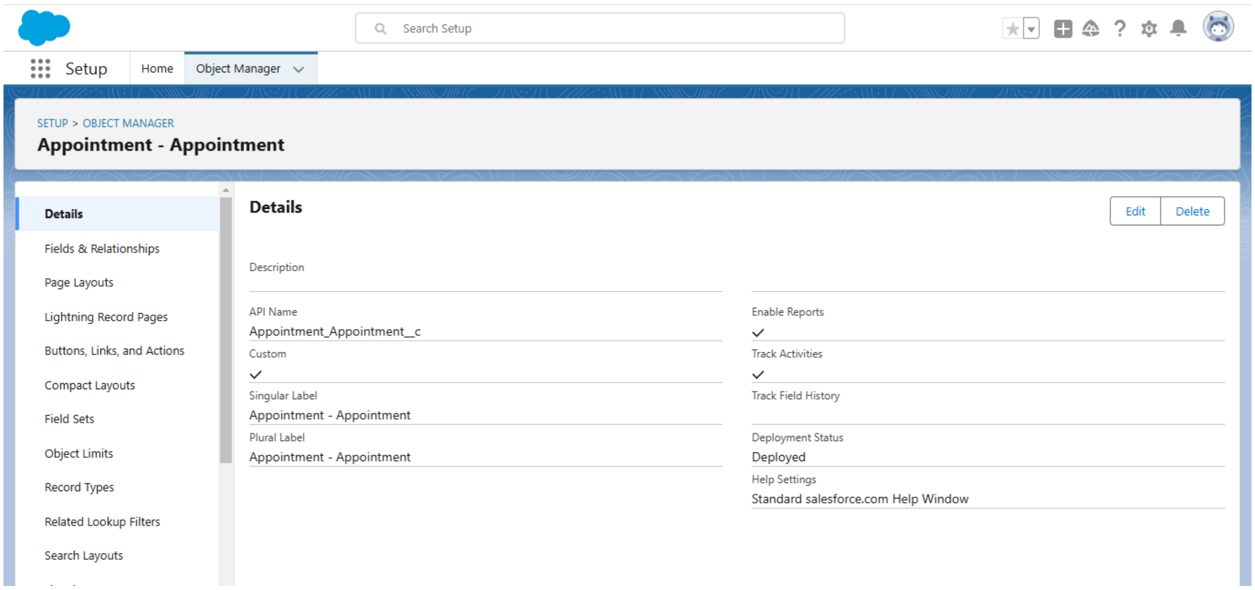
2 . **Create Remaining Objects**

- Additional objects like **Consultant**, **Student**, and **Appointment** are created in the same way. These objects help the institution manage information about each student's interactions and specific service requests.

3. **Establish Relationships among Objects**



To track interactions and dependencies, the CRM establishes relationships between objects. For example, an **Appointment** object may link a **Student** with a **Consultant**, while a **Registration** object can relate a **Student** to a **Course**.



4 . Configure the Case Object

- The **Case** object helps manage specific student inquiries, such as requests for visa support or academic advising. Custom fields like **Type** (e.g., Immigration, Visa Application) and **Status** (e.g., Open, In-progress) help categorize and track cases effectively.

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2. Create a Lightning App for Institution Services

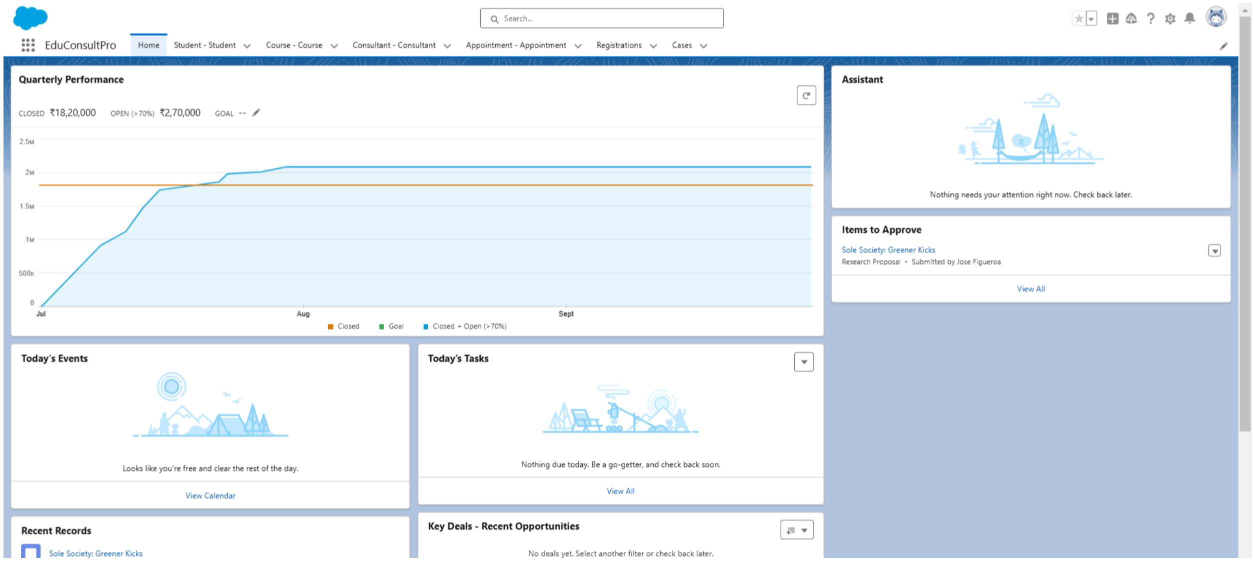
A Lightning App serves as a centralized platform within Salesforce, allowing institution staff to access key tabs and services related to student management in a structured interface.

1. **Setting Up App Details**

- The app is named to reflect the institution's CRM, such as **InstitutionCRM**, and includes settings that make it accessible to specific profiles within the organization.

2. **Adding Relevant Tabs**

- Tabs like **Home**, **Students**, **Courses**, **Consultants**, **Appointments**, **Registrations**, and **Cases** are included in the app for ease of navigation. Each tab represents a key area within the CRM, organizing student and service data by category.



3.Profile-Based Access Control

- Access to the Lightning App is restricted by user profiles to ensure that only authorized staff can access certain areas. For example, administrators may have access to all data, while consultants only see student appointments and relevant cases.

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3. Create a ScreenFlow for the Student Admission Application Process

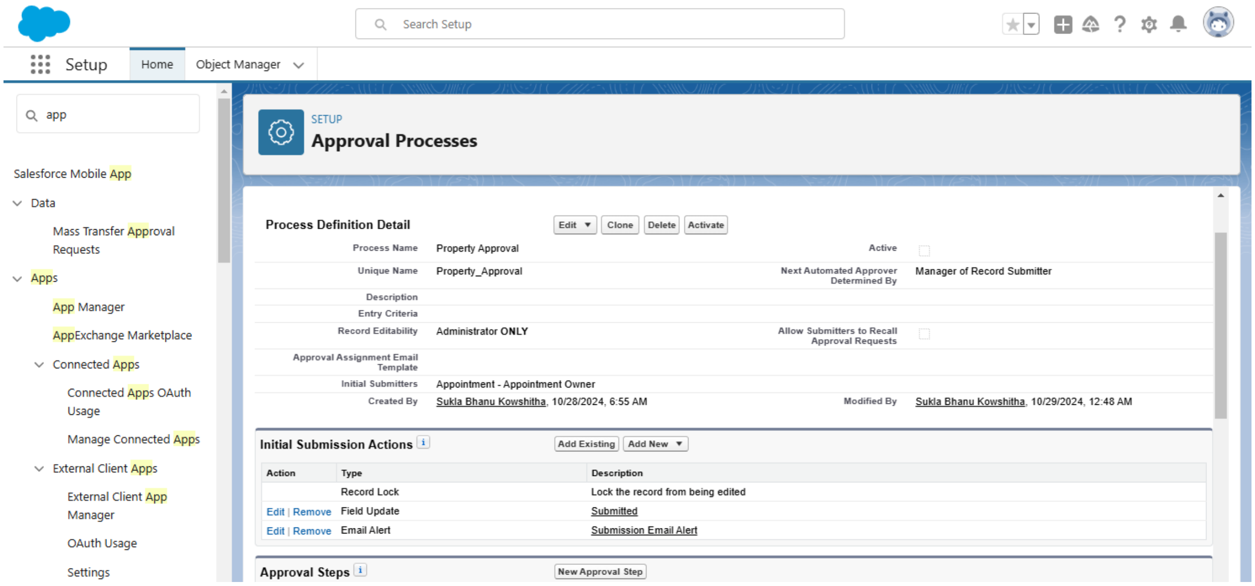
ScreenFlows provide guided, step-by-step screens that streamline complex processes like student admissions. They make it easy for users to complete data entry without needing in-depth CRM knowledge.

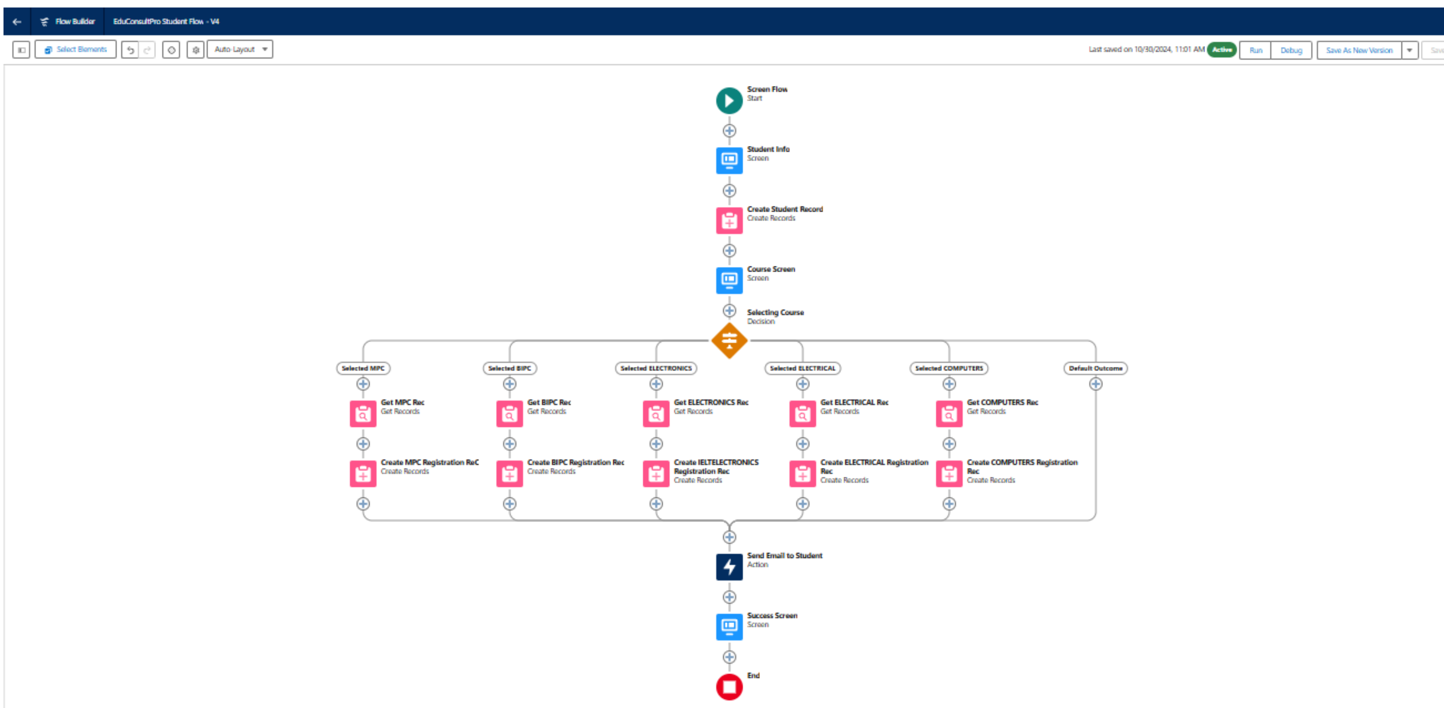
1. **Student Information Gathering**

- The flow begins with a screen where prospective students input personal details, which are stored in a **Student** object record in Salesforce.

2. **Course Selection and Decision-Making**

- A follow-up screen allows students to select a course (e.g., MPC, BIPC, Electronics). Based on the course selected, the flow triggers different actions, such as creating specific registration records for the chosen course.





3. **Confirmation and Success Screen**

- Upon successful registration, the flow sends an automated confirmation email and displays a success message, confirming the student's registration.

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4. EduConsultPro Existing Student Flow

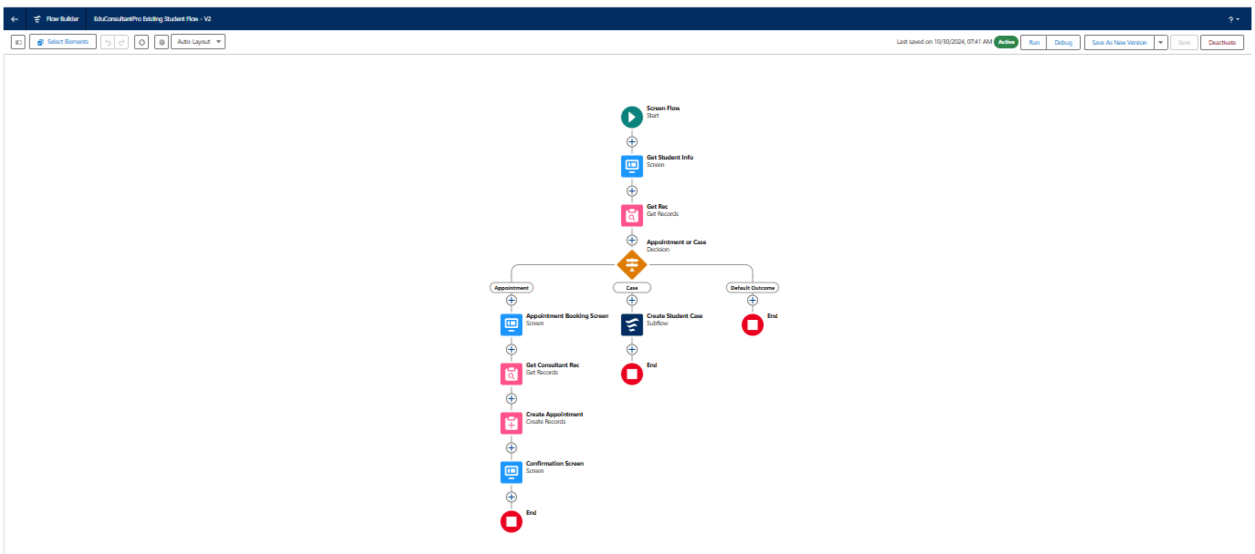
The **Existing Student Flow** assists current students with booking appointments or submitting inquiries (cases) through a user-friendly interface.

1. **Retrieving Student Information**

- For existing students, the CRM pulls up records from the **Student** object to pre-fill information, simplifying the process of booking appointments or creating inquiries.

2. **Service Selection: Appointment or Case**

- The flow presents a screen allowing students to select whether they need an appointment or to create a case. Based on their choice, it then leads them through a customized process.



3. **Completion and Confirmation**

- Once the student's request is processed, the flow provides a confirmation screen, sending any relevant details (e.g., appointment time) via email to both the student and the assigned staff member.

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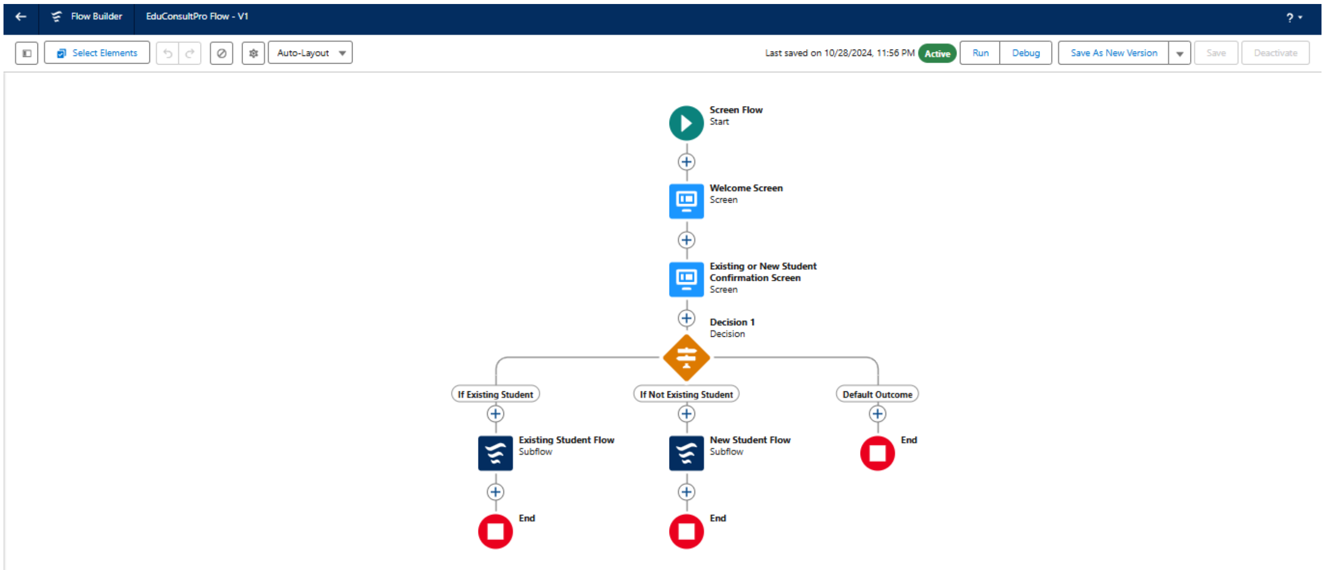
5. EduConsultPro Main Flow

The **Main Flow** is a high-level process that guides users to the appropriate flow based on their status as a new or existing student.



1. **Initial Student Verification**

- A welcome screen prompts the student to identify whether they are a new applicant or a current student. This allows the CRM to route them to the correct subflow.

2. **Decision to Direct to Subflow**

- Based on the student's selection:
- **New Student**: The system initiates the **Student Admission Flow** to handle the application.
- **Existing Student**: The system initiates the **Existing Student Flow** for managing appointments or inquiries.

3. **Completion and Feedback**

- After the relevant subflow completes, the main flow provides final feedback, helping users confirm their next steps.

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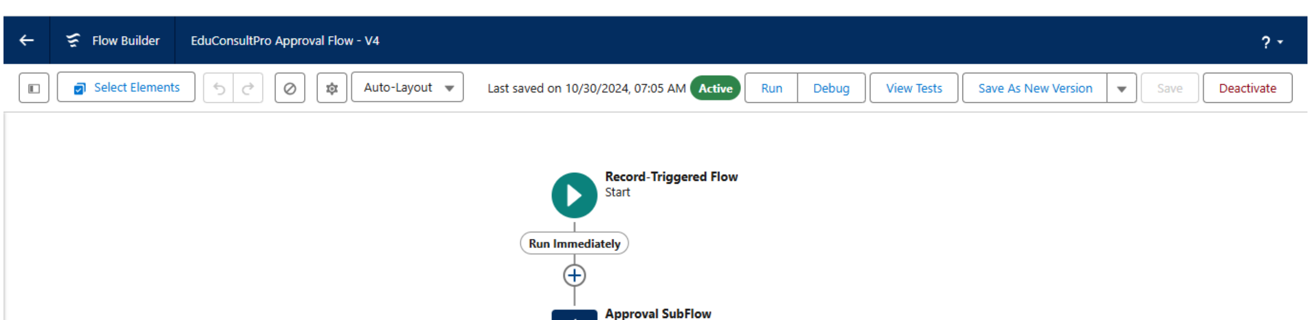
6. EduConsultPro Approval Flow

This approval flow automates the validation process for records that require oversight, such as student cases or course registrations.



1.Record-Triggered Flow

- The approval flow is triggered when a record update or creation meets specific conditions (e.g., a new visa application).

2. **Approval Subflow**

- The main flow calls a subflow for approval, routing requests to relevant staff members based on criteria such as urgency or case type. The subflow updates the record's status once the approval decision is made.

3. **Notifications and Final Actions**

- Once approval is completed, the system notifies the relevant staff and updates the status of the record, allowing for immediate follow-up if necessary.

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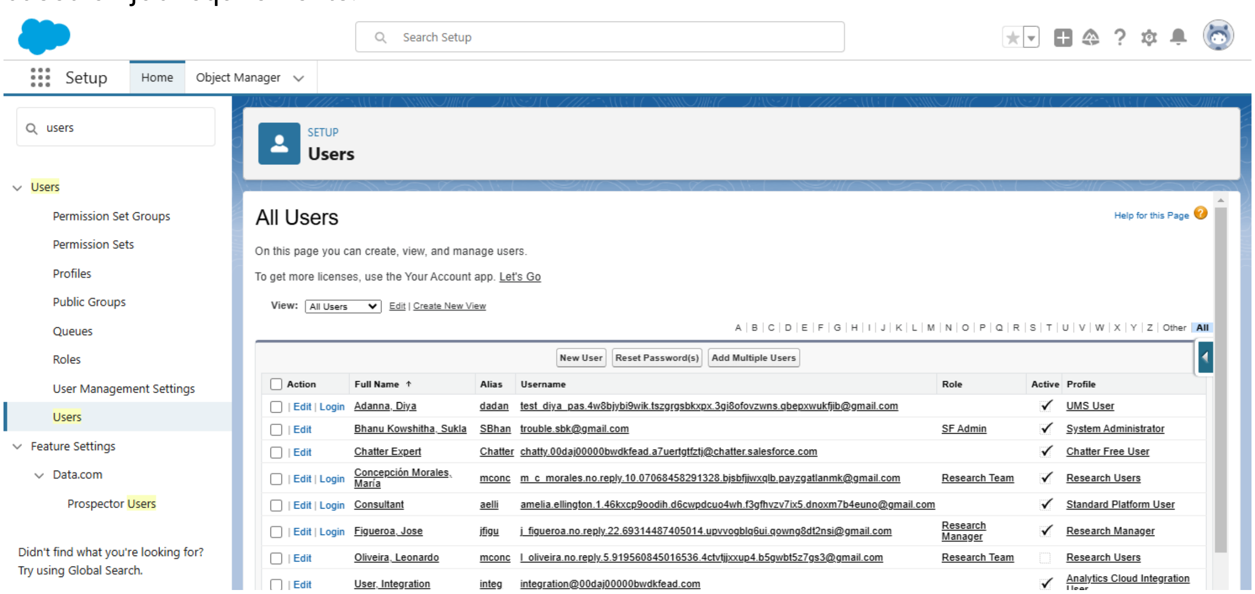
7. Create Users

The CRM requires different user roles to control access to various data and functionalities based on job requirements.



1. **Creating User Profiles**

- Salesforce allows the creation of profiles for roles such as **Admissions Officer** or **Consultant**. Each profile has specific permissions and access levels based on job functions.

2. **Role-Based Access Permissions**

- By setting permissions, users can only access areas relevant to their duties. For example, consultants might only access appointments and cases, while administrators can access all data.

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8. Create a Record-Triggered Flow

A Record-Triggered Flow automates processes in response to record changes, ensuring timely actions without manual input.

1. **Define Trigger Conditions**

- The flow triggers based on criteria, such as the creation of a new **Student** record. This can automate actions like sending a welcome email or creating related records.

2. **Automate Actions**

- Actions in this flow could include updating student records, sending notifications, or triggering other flows based on the student's registration status.

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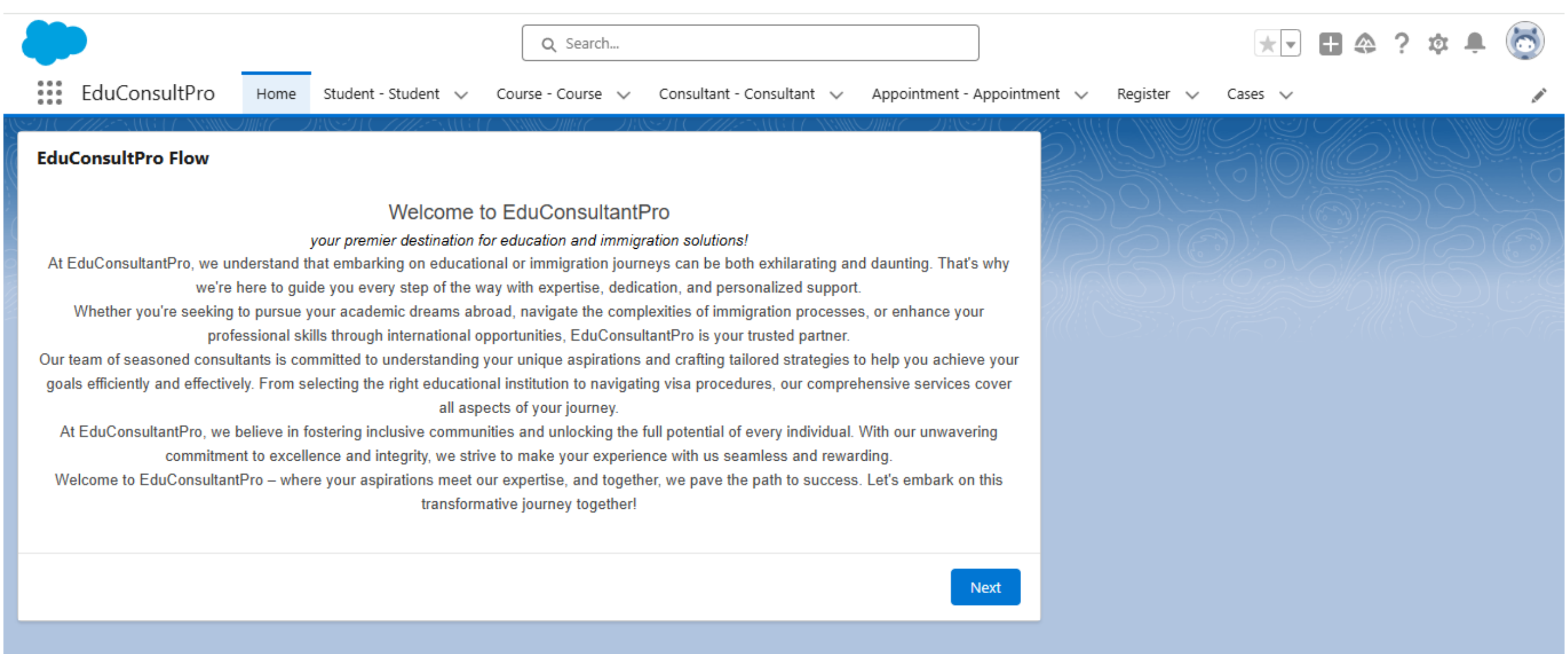
9. Create a Lightning App Page

The Lightning App Page provides a dashboard-like interface for users to access the CRM's main features easily.

1. **Add Tabs and Components**

- Key tabs like **Students**, **Courses**, and **Cases** are included in the app layout. Components such as recent items or quick links to important records improve usability .



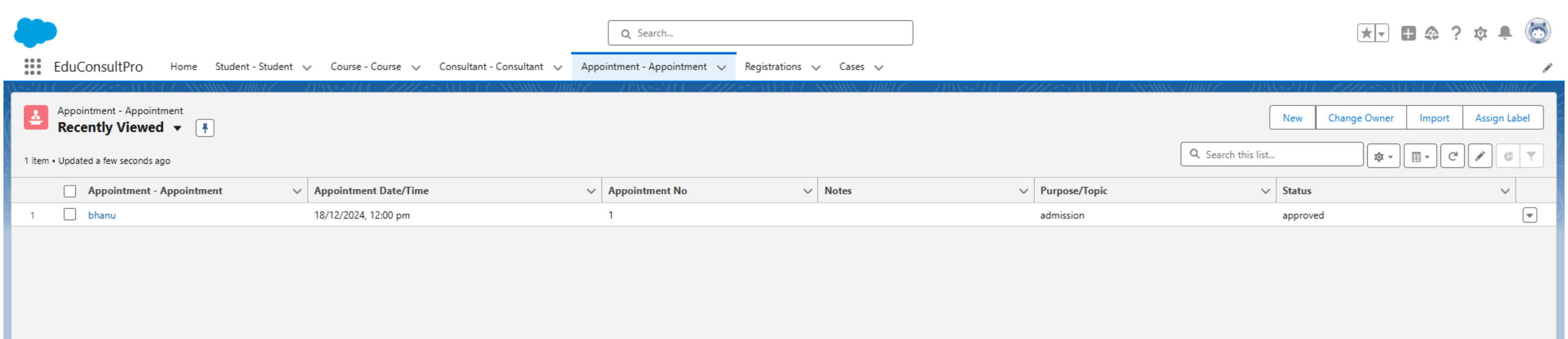
EduConsultPro Lightning App Sections

The **EduConsultPro Lightning App** organizes core areas within the CRM, providing a streamlined interface to manage appointments, student records, consultant information, courses, cases, and registrations. Each section within the app serves a specific purpose, allowing staff to access and update relevant data efficiently.

1. Appointments Section

The **Appointments** section in the Lightning App is designed for managing student appointments with consultants or advisors.

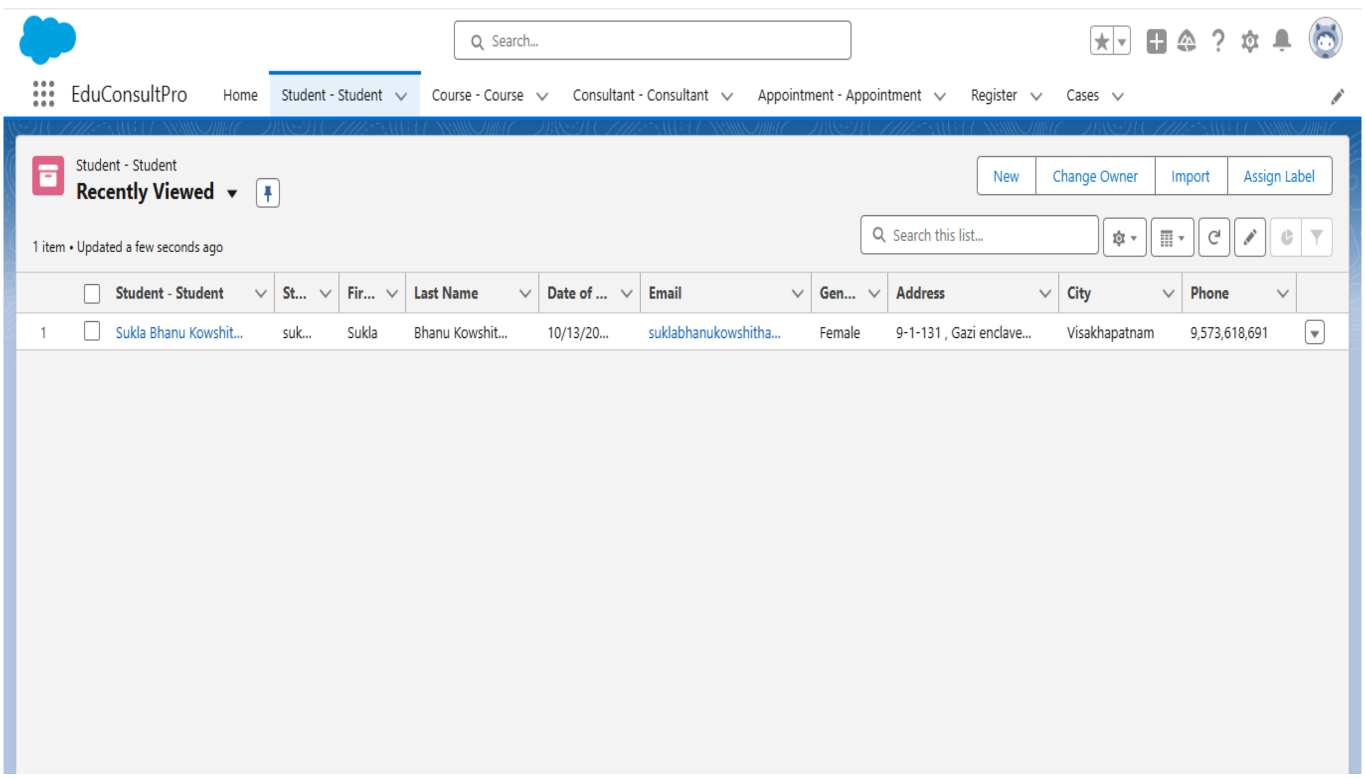
- **Overview Panel**: Displays a list of upcoming and past appointments, organized by date and consultant.
- **Key Features**:
  - **Create New Appointment**: Staff can create new appointments and assign students and consultants.
  - **View Appointment Status**: Track appointment status, such as Scheduled, Completed, or Canceled.
  - **Filter Options**: Filter appointments by student, consultant, or appointment date for quick access.
- **Use Case**: This section is particularly useful for admissions staff managing interviews, consulting sessions, or follow-up meetings with students.



2. Students Section

The **Students** section provides a centralized view of all student records in the CRM, enabling staff to manage admissions, update profiles, and view case history.

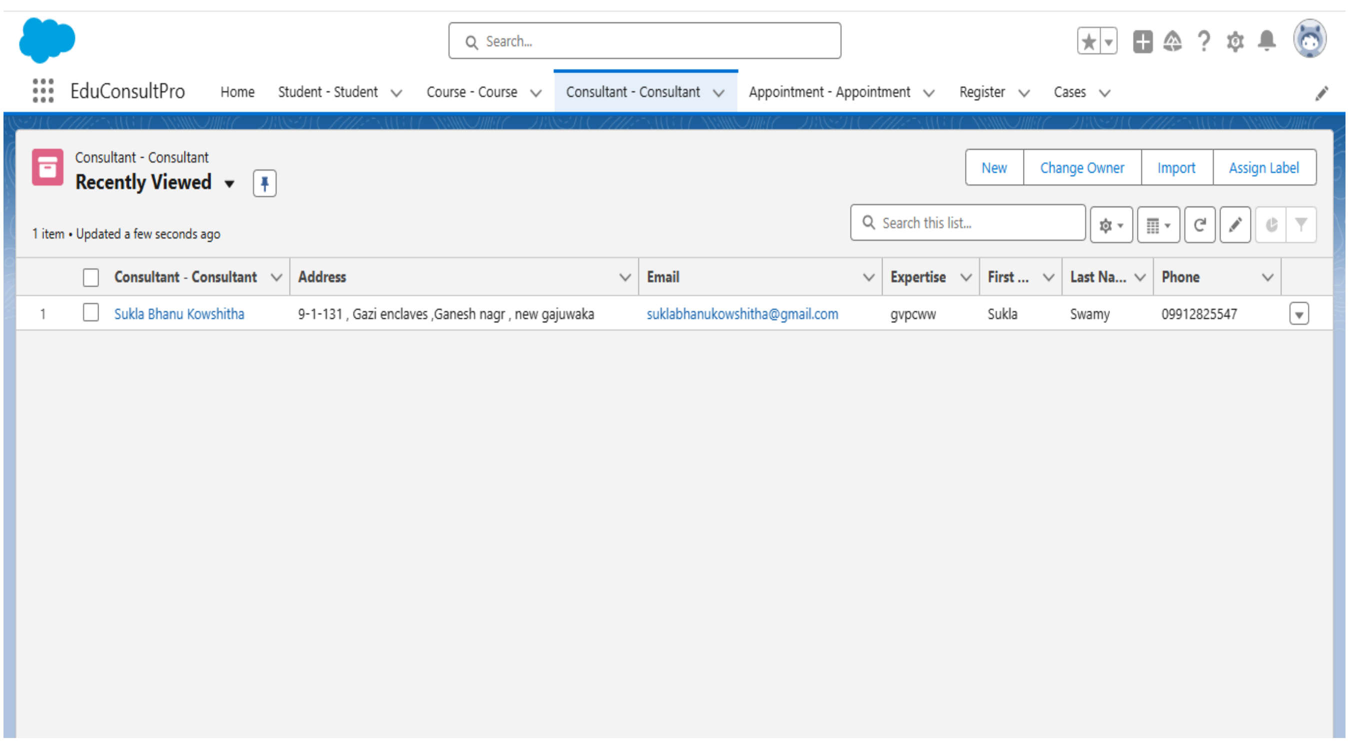
- **Overview Panel**: Lists all current and prospective students, organized by name, enrollment status, or course.
- **Key Features**:
  - **Detailed Student Profile**: Access each student's profile with information on personal details, course registrations, and case histories.
  - **Admission Status**: View and update each student's admission application status (e.g., Applied, In Progress, Admitted).
  - **Edit and Update Records**: Staff can directly update contact details, academic progress, and other student information.
- **Use Case**: Streamlines access to student information for admissions officers or counselors, aiding in efficient case handling and follow-up.



3. Consultants Section

The **Consultants** section manages records for institution staff or consultants who interact with students, providing an organized view of consultant information and their appointment history.

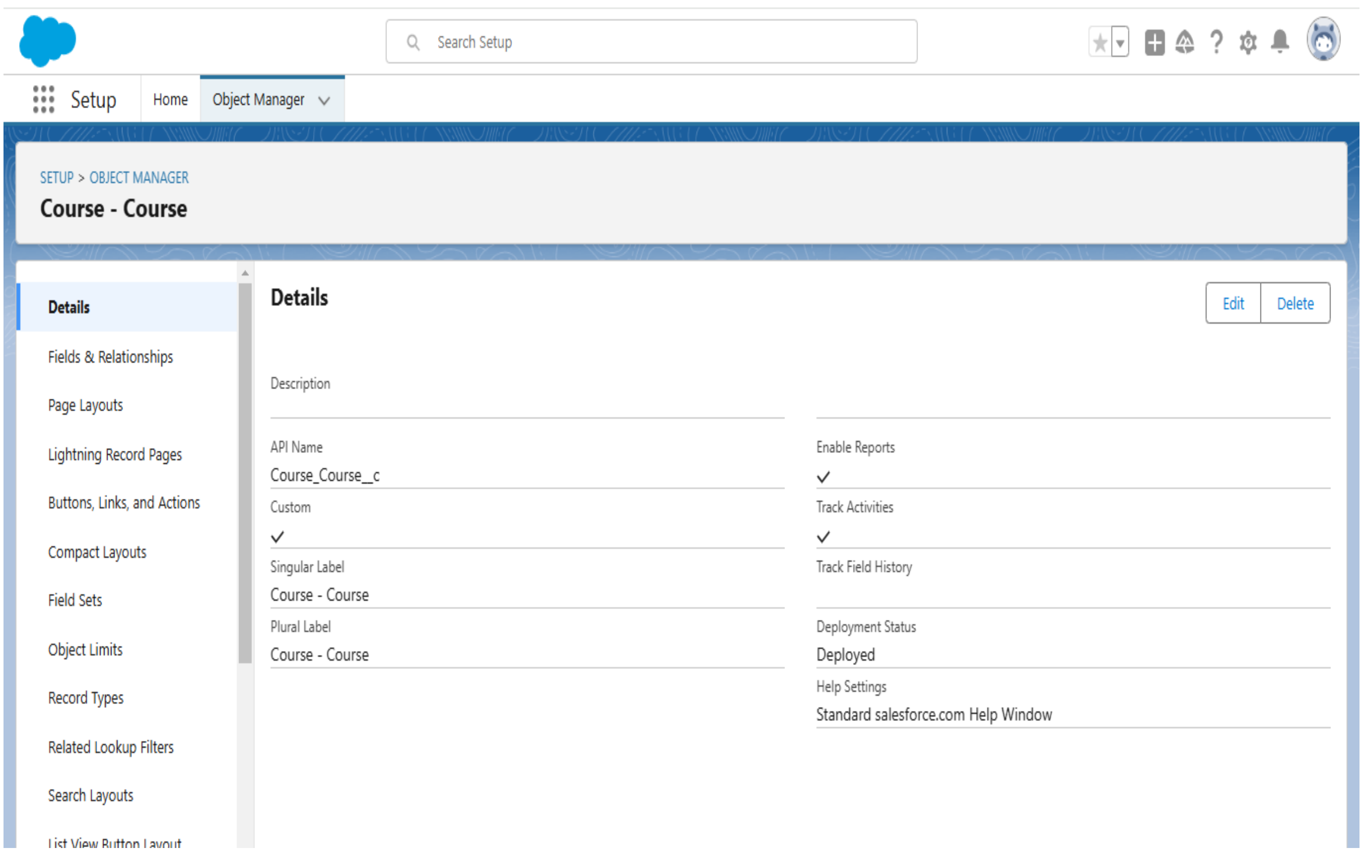
- **Overview Panel**: Displays a list of all consultants, searchable by name, specialization, or availability.
- **Key Features**:
    - **Consultant Profile**: Includes consultant details, expertise, availability, and appointment history.
    - **Availability Tracking**: Shows each consultant's current availability, helping staff schedule appointments accordingly.
    - **Appointment Summary**: Displays past and upcoming appointments to assist consultants in managing their schedules.
- **Use Case**: Allows staff to match students with available consultants based on expertise, optimizing the appointment scheduling process.



4. Courses Section

The **Courses** section provides a detailed view of all courses offered by the institution, enabling staff to manage course details and track student enrollment.

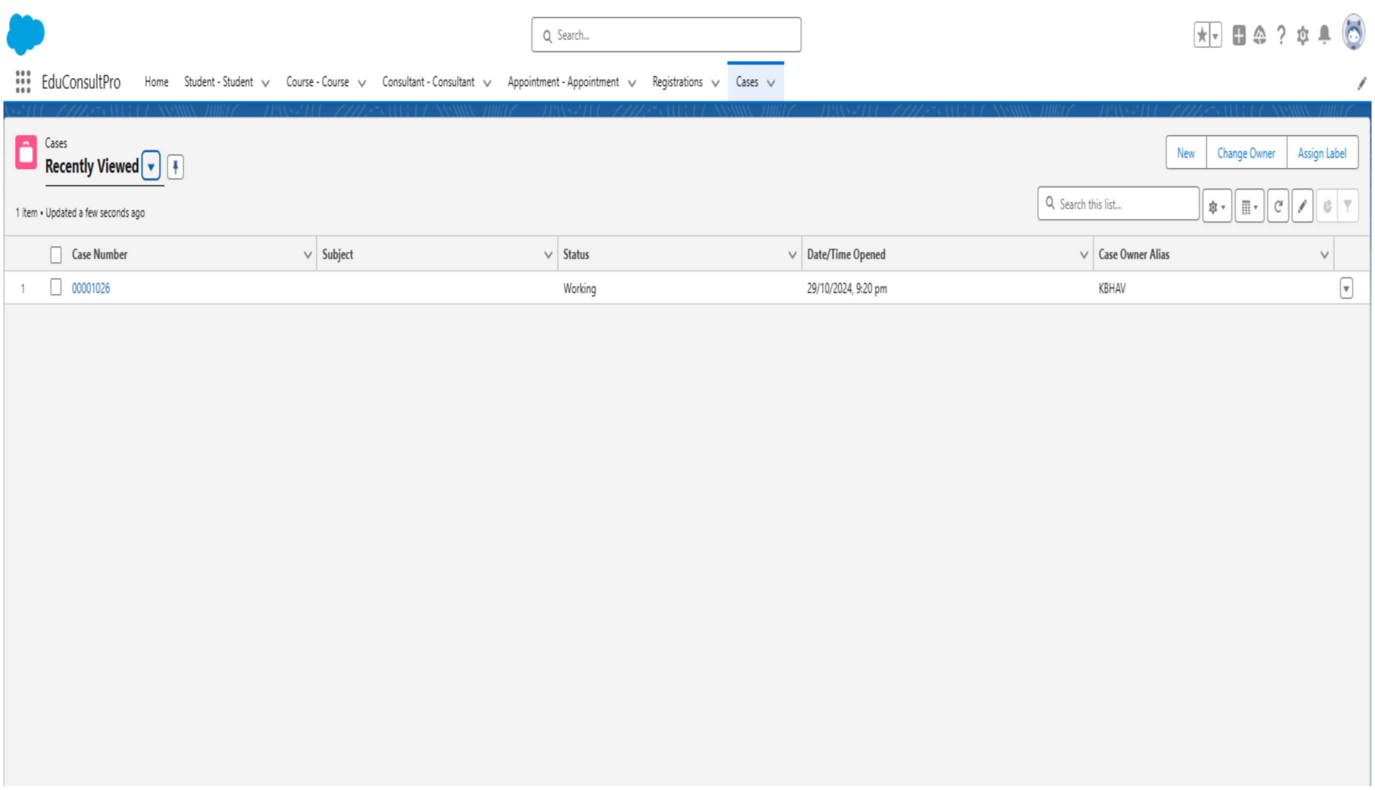
- **Overview Panel**: Displays all courses with basic details like course title, description, and enrollment numbers.
- **Key Features**:
    - **Course Details**: Access full course information, including prerequisites, course descriptions, and academic level.
    - **Enrolled Students**: View a list of students registered in each course for quick reference.
    - **Edit Course Information**: Staff can update course descriptions, prerequisites, or enrollment limits as needed.
- **Use Case**: Ideal for admissions and academic staff who need to provide students with accurate course information and handle course-specific inquiries.



5. Cases Section

The **Cases** section centralizes all student inquiries, making it easier to track and manage open cases related to student services, such as immigration, visa applications, or academic advising.

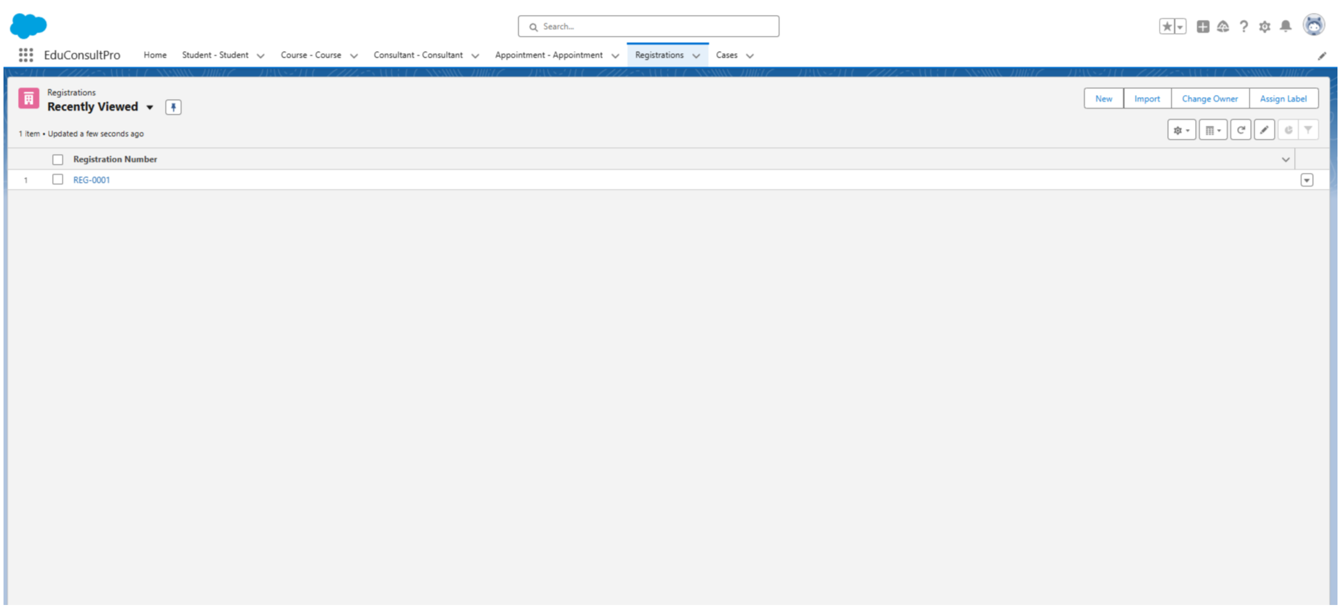
- **Overview Panel**: Lists all open, in-progress, and resolved cases, organized by type and status.
- **Key Features**:
  - **Case Type and Status Tracking**: Each case includes fields for type (e.g., Visa Application, Academic Counseling) and status (e.g., Open, In-progress, Resolved).
  - **Create New Case**: Staff can initiate new cases and associate them with specific student profiles.
  - **Case Notes and Updates**: Staff can add notes, attach documents, and update case status as it progresses.
- **Use Case**: Essential for admissions officers and support staff to manage inquiries, improving response times and ensuring that no inquiries are missed.



6. Registrations Section

The **Registrations** section manages all student course registrations, providing a clear view of each student's enrolled courses.

- **Overview Panel**: Shows a list of active registrations with filters for student name, course, or enrollment date.
- **Key Features**:
    - **Student-Course Link**: Displays each student's course registrations and enrollment details.
    - **Registration Status**: Allows staff to track registration statuses, such as Pending, Confirmed, or Withdrawn.
    - **Edit Registration Information**: Staff can make updates to enrollment data, such as switching courses or updating enrollment status.
- **Use Case**: Valuable for admissions staff managing course enrollments, ensuring that students are accurately registered and that records are current.



2. **Publish and Test**

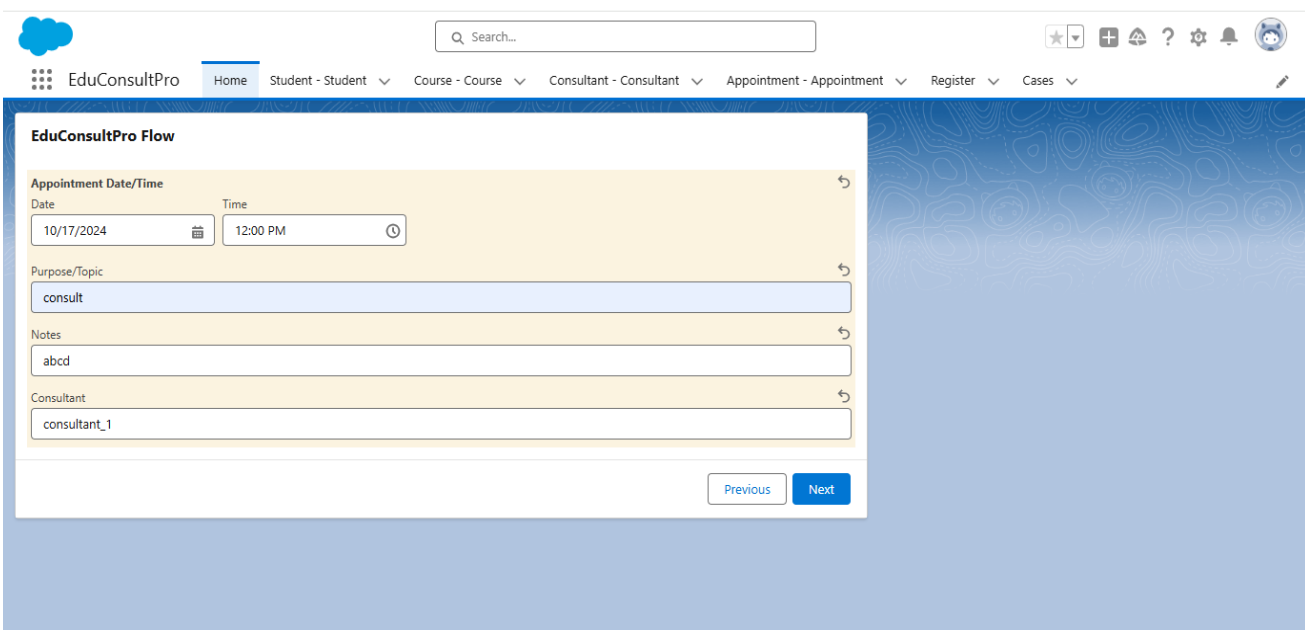
- After customizing, the app page is published, allowing staff to test and access CRM functions directly.

EduConsultPro Lightning App Outputs

The **EduConsultPro Lightning App** not only centralizes student service management but also provides real-time outputs based on user data, helping institution staff monitor and respond to student needs effectively. Outputs in this app refer to the dynamic displays, reports, and actionable insights generated as users input or update data within each section. These outputs are essential for providing timely feedback, tracking service statuses, and ensuring smooth interactions between students and staff.

Key Outputs Across Sections

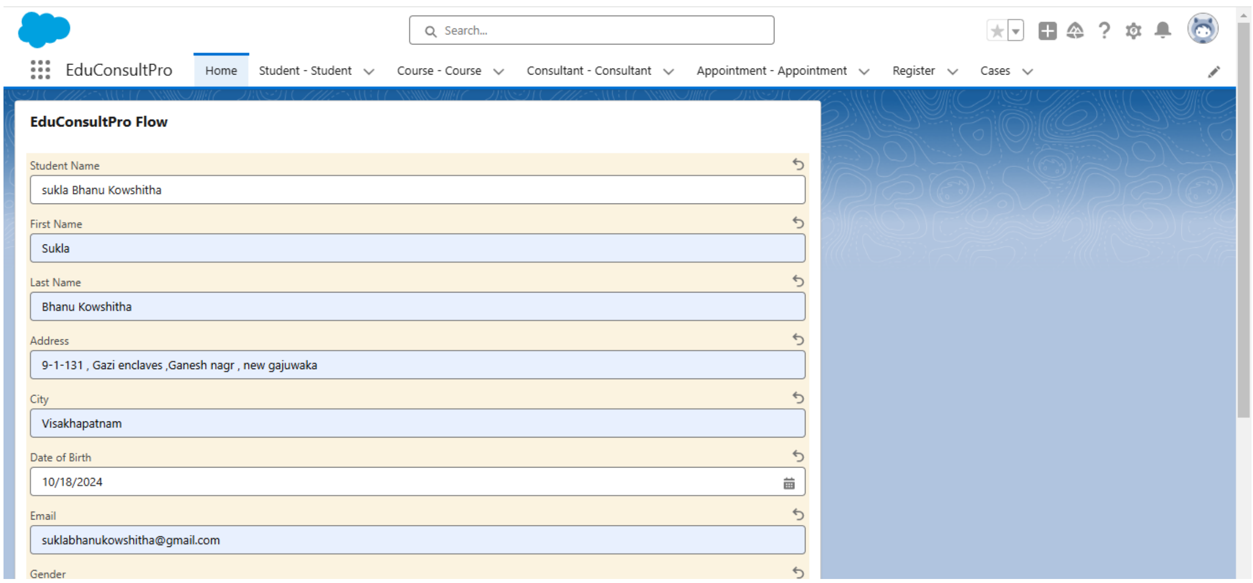
1. **Appointments Section Outputs**
   - **Real-Time Appointment Status**: As appointments are created, updated, or canceled, the Appointments section reflects these changes instantly. Staff can see appointment status (e.g., Scheduled, Completed, Canceled) alongside the appointment details.
   - **Availability Notifications**: Staff can quickly identify available time slots and consultant schedules, allowing for real-time adjustments when rescheduling appointments.



Screenshot showing real-time status updates in Appointments section

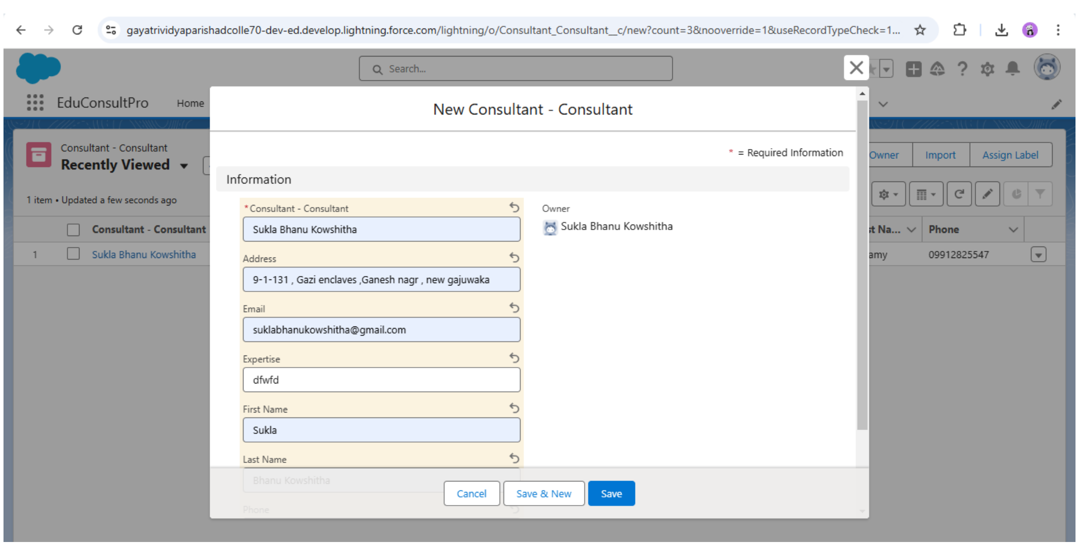
2. **Students Section Outputs**

- **Profile and Admission Status Updates**: When new student information is entered, the CRM generates a profile output displaying all personal details, admission status, and enrollment history. Staff can view updates to a student's admission status (e.g., Applied, In Progress, Admitted) in real-time.
- **Case History**: Any cases created under a student's profile display a historical record of interactions, inquiries, and resolutions, providing a quick overview of each student's service history.



Screenshot showing student profile with updated admission status and case history

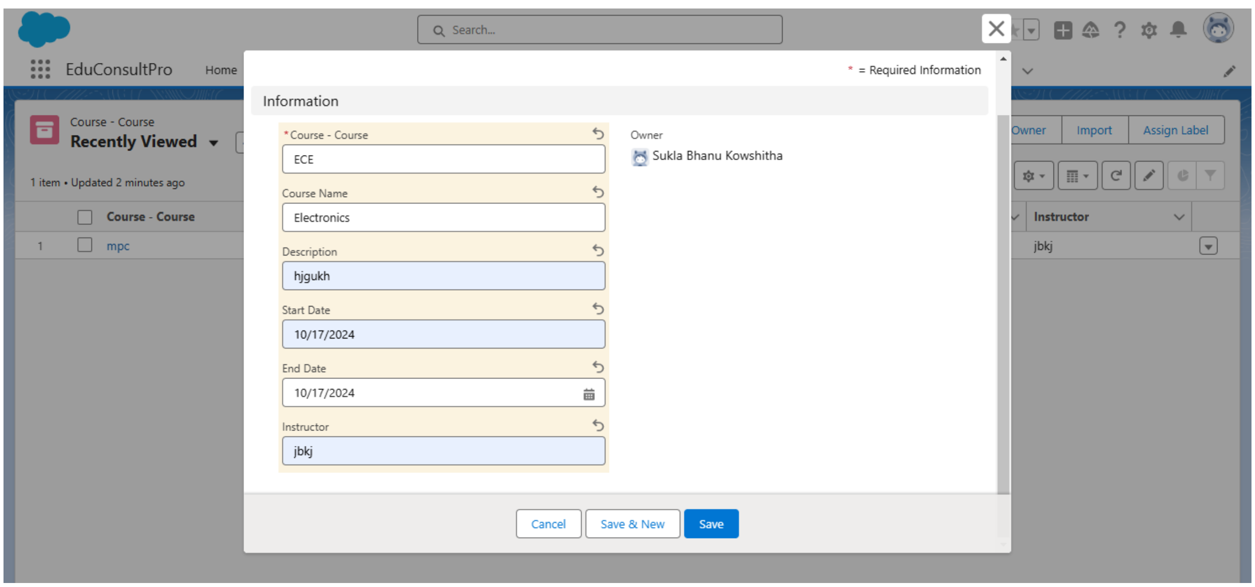
3. **Consultants Section Outputs**



Screenshot of consultant profile showing updated schedules and expertise

- **Consultant Schedules and Appointment Summaries**: As students book appointments, the Consultants section displays each consultant's updated schedule, showing availability, past appointments, and upcoming sessions.
- **Expertise and Availability Indicators**: Consultants' areas of expertise and availability status are reflected immediately, enabling the institution to manage appointments based on consultant skill sets and student needs.

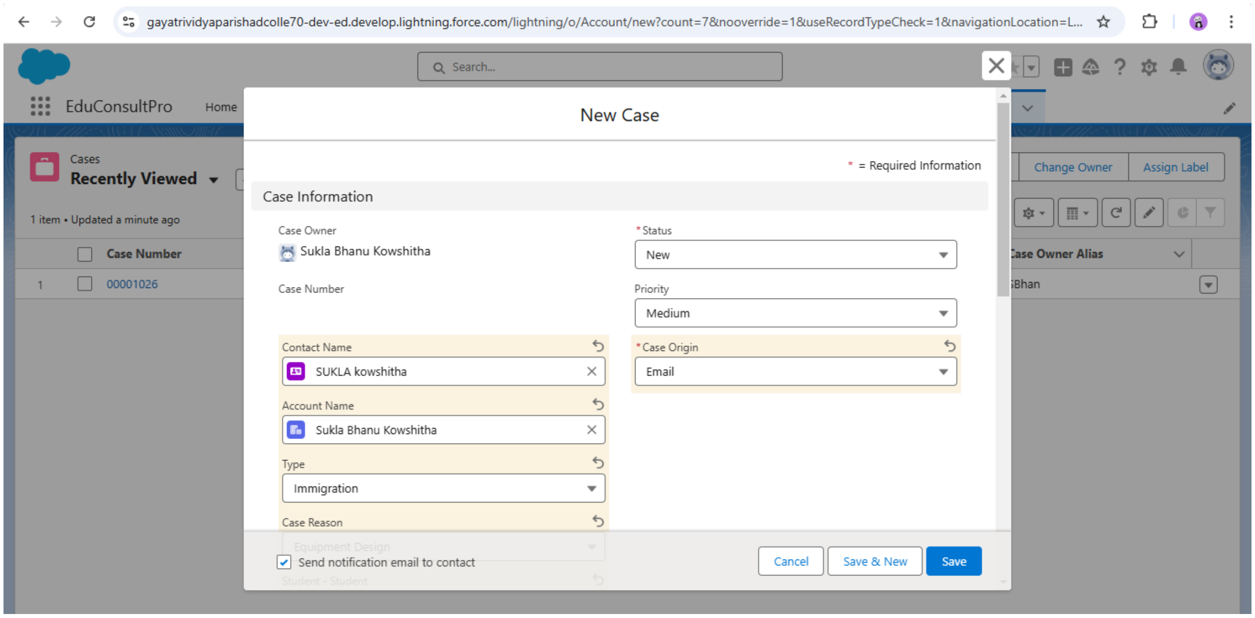
4. **Courses Section Outputs**
   - **Enrollment Summaries**: As students register for courses, the Courses section dynamically displays updated enrollment counts and details about each course, including prerequisites and descriptions.
   - **Course-Specific Student Lists**: Each course page provides a current list of enrolled students, helping staff manage student data for classes and track course popularity.



Screenshot showing enrollment numbers and student list for a specific course

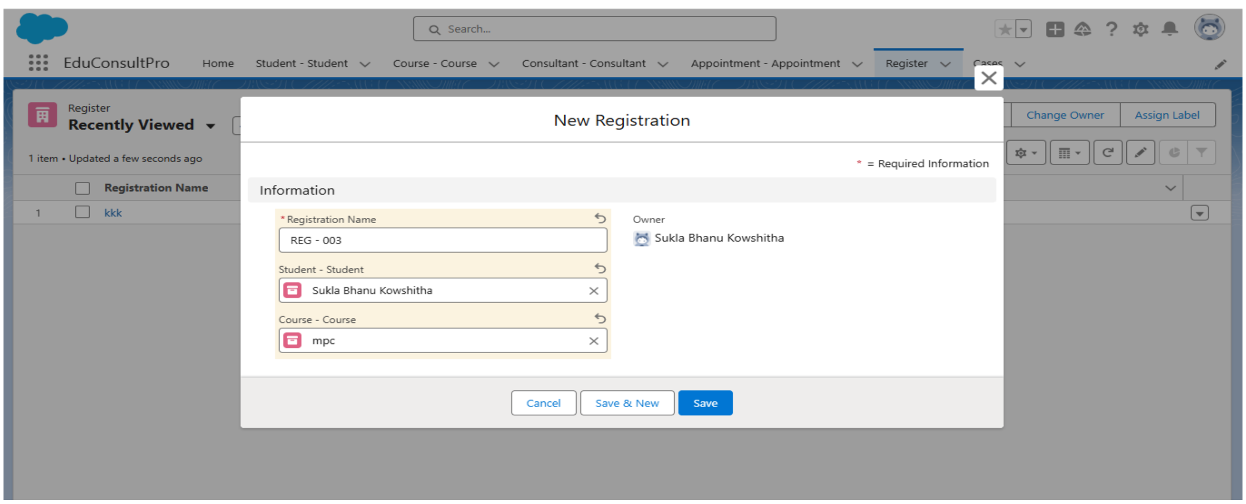
5. **Cases Section Outputs**
   - **Live Case Status Tracking**: As cases are opened, updated, or resolved, the Cases section displays real-time status updates, enabling staff to see where each inquiry stands (e.g., Open, In-progress, Resolved).

   - **Case Resolution Summaries**: For resolved cases, the CRM generates a summary of actions taken and outcomes achieved, giving a complete view of the resolution process for each student inquiry.



Screenshot showing real-time case status and resolution summaries

6. **Registrations Section Outputs**



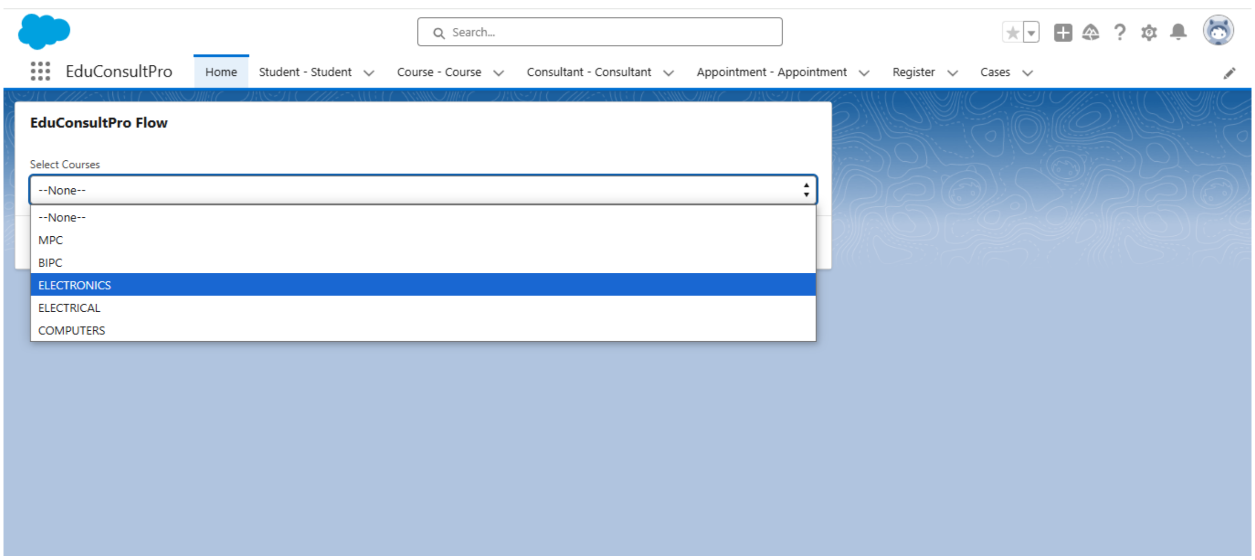
Screenshot of registration section showing enrollment status updates

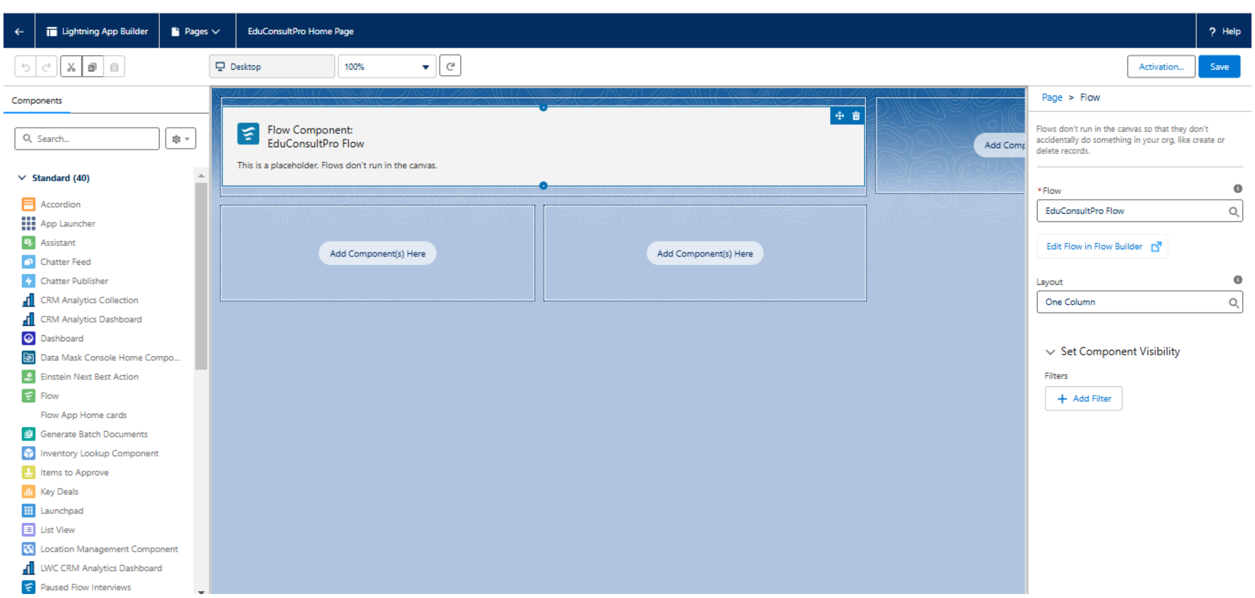
- **Current Enrollment Statuses**: As student registrations are processed, this section provides updated enrollment statuses for each student's chosen course, such as Pending, Confirmed, or Withdrawn.
- **Historical Registration Data**: Staff can view a student's complete registration history, which is helpful for tracking their academic path and any changes in course enrollments over time.

Benefits of Real-Time Outputs in EduConsultPro

The dynamic outputs in **EduConsultPro Lightning App** allow for:

- **Improved Responsiveness**: Real-time updates ensure that staff can act quickly on changes in student records, appointments, or case statuses.
- **Data-Driven Decision-Making**: With immediate insights into enrollment numbers, case resolution rates, and consultant availability, institution staff can make informed decisions and provide timely assistance to students.
- **Enhanced Service Tracking**: The app provides comprehensive records of student interactions, allowing staff to review, report on, and improve service quality based on historical data.





Best Practices and Troubleshooting

1. **Data Consistency**
- Ensuring data accuracy in fields and relationships is crucial to preventing errors.
2. **Security Management**
- Regularly updating user permissions and roles is essential to maintaining data security, especially with sensitive student information.
3. **Optimizing Flow Processes**
- Periodic review of flows and automations ensures that the CRM remains efficient and responsive, even as the institution's needs evolve.

Advantages of a CRM Application for Institutions

1. **Improved Efficiency**:
    - **Automation of Processes**: Streamlines administrative tasks such as admissions, inquiries, and case management, reducing manual workloads for staff.
    - **Centralized Data Management**: Combines student records, course information, and service requests in one platform, making access easier.
2. **Enhanced Student Experience**:
    - **Personalized Communication**: Allows for tailored communication and follow-ups based on student interactions and preferences.
    - **User-Friendly Interface**: Simplifies processes for students, from admissions to appointments, enhancing their overall experience.
3. **Better Data Management**:
    - **Data Accuracy**: Ensures high data quality through validation rules and regular audits, minimizing errors and duplications.
    - **Comprehensive Reporting**: Provides insights and analytics on student performance, admissions trends, and service usage for informed decision-making.
4. **Increased Collaboration**:
    - **Team Coordination**: Facilitates collaboration between departments (e.g., admissions, academic advising, and financial aid) by providing shared access to student data and communication histories.
    - **Role-Based Access**: Ensures that staff have appropriate access to the data they need while protecting sensitive information.

5. **Scalability**:
    - **Adaptable to Institutional Growth**: Easily scales to accommodate growing student populations and evolving institutional needs, allowing for the addition of new features and modules as required.

Applications of a CRM Application in Educational Institutions

1. **Student Admissions Management**:
    - Streamlines the entire admissions process from application submission to enrollment, including document management and communications with prospective students.
2. **Student Inquiry and Case Management**:
    - Facilitates the handling of inquiries related to courses, financial aid, or immigration issues, allowing staff to track and manage cases efficiently.
3. **Appointment Scheduling**:
    - Simplifies the process for students to book appointments with academic advisors or consultants, ensuring that all appointments are tracked and managed in one system.
4. **Course and Program Management**:
    - Helps institutions manage course offerings, prerequisites, and enrollment details, providing students with easy access to relevant course information.
5. **Alumni Relations and Engagement**:
    - Manages interactions with alumni for events, fundraising, and networking opportunities, helping institutions maintain strong relationships with former students.
6. **Feedback and Survey Management**:
    - Collects and analyzes student feedback on courses and services to inform improvements and adjustments in academic offerings and student support.
7. **Performance Tracking and Reporting**:
    - Allows institutions to track student progress, course completion rates, and overall performance metrics, providing valuable insights for continuous improvement.