

CRM Application to Manage the Services Offered by Institution

1. Project Overview

This project, "CRM Application to Manage the Services Offered by Institution," leverages Salesforce CRM to centralize and automate the management of student admissions, consulting requests, and immigration case processing. EduConsultPro Institute, a premier educational institution, aims to provide a seamless experience for prospective students, while enabling staff to efficiently manage admissions and consulting processes. The project's comprehensive solution includes automation, user-friendly interfaces, approval workflows, and advanced reporting to enhance data-driven decision-making and streamline operational processes.

2. Objectives

Business Goals

- Streamline the admissions and consulting process, improving the experience for students and efficiency for EduConsultPro staff.
- Enable automated handling of service requests and inquiries to reduce manual workload.
- Support consultants and admissions staff with data insights through reports and dashboards.

Specific Outcomes

- Centralized data management for admissions applications, consulting requests, and immigration case handling.
- Automated workflows and approvals for streamlined processing and enhanced communication.
- Improved tracking of admission metrics, approval processes, and case statuses.

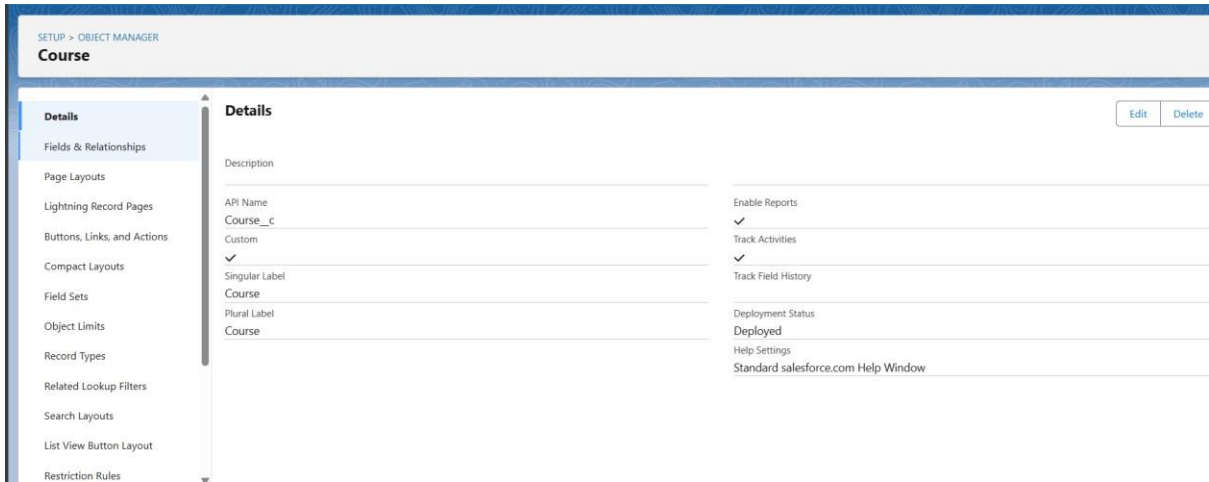
3. Salesforce Key Features and Concepts Utilized

- **Custom Object Creation:** Define objects for managing student data, applications, consulting requests, and immigration cases.
- **User Management:** Create distinct user roles (e.g., Admissions Officer, Consultant, Case Manager) with access rights tailored to their responsibilities.
- **Lead and Opportunity Management:** Capture leads and convert to admissions applications.
- **Approval Processes:** Implement an approval workflow for consulting requests with automatic email alerts for status changes.
- **ScreenFlow for Student Admission Application:** Provide an interactive form in Salesforce to guide students through the application process.
- **Record-Triggered Flow:** Automate actions when specific records (e.g., student applications or consulting requests) are created or updated.
- **Combined ScreenFlow for Workflow Integration:** Aggregate multiple flows into a single ScreenFlow to streamline the user experience.
- **Lightning App Page:** Create a custom page for admissions staff to access flows, dashboards, and records related to student and consulting processes.
- **Reports and Dashboards:** Monitor metrics such as admission trends, approval rates, and case statuses.
- **Email Templates:** Automated notifications at various stages to keep students and staff informed.

4. Detailed Steps to Solution Design

1>Create Objects From Spreadsheet

- **Create Course Object:** A custom object named "Course" was created using the data provided in the 'Course' spreadsheet. This involved mapping the spreadsheet columns to the Salesforce fields in the Course object.



- **Create Remaining Objects:** Similar to the Course object, custom objects were created for Consultant, Student,

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Appointment	Appointment_c	Custom Object		27/10/2024	✓
Student	Student_c	Custom Object		27/10/2024	✓

Appointment, and Registration using the provided spreadsheets. Field mapping ensured data integrity during the import process

- **Create Relationship Among the Objects:** Lookup relationships were established between the objects to connect related data:
 - Appointment to Student (Student lookup on Appointment object)
 - Appointment to Consultant (Consultant lookup on Appointment object)
 - A custom object, "Registration," was created to store student and course details. Lookup relationships were added:
 - Registration to Student
 - Registration to Course
 - A lookup relationship was also established between Student and Case objects.

Configure The Case Object

The standard Case object was configured to include custom picklist values:

- Type Field: 'Immigration' and 'Visa Application' values added.
- Status Field: 'Open' and 'In-Progress' values added. (Consider adding 'Closed' or similar for completeness).

SETUP > OBJECT MANAGER

Appointment

Details

Fields & Relationships
9 Items, Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Name	Text(80)		✓
Appointment Date/Time	Appointment_DateTime__c	Date/Time		
Appointment No	Appointment_No__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Notes	Notes__c	Long Text Area(131072)		
Owner	OwnerId	Lookup(User,Group)		✓
Purpose/Topic	PurposeTopic__c	Text(255)		
Status	Status__c	Picklist		

SETUP > OBJECT MANAGER

Case

Details

Fields & Relationships
35+ Items, Sorted by Field Label

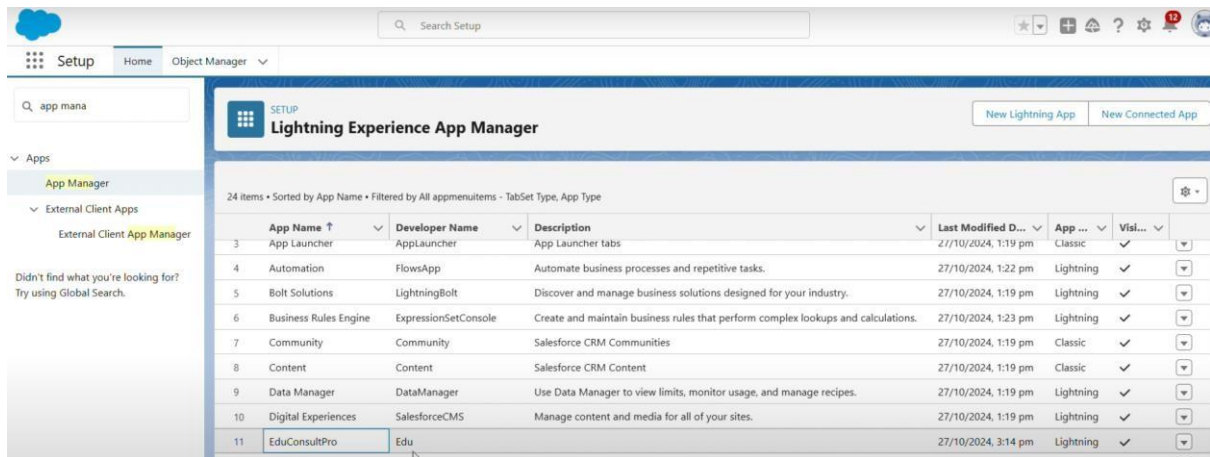
Q Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	AccountId	Lookup(Account)		✓
Asset	AssetId	Lookup(Asset)		✓
Business Hours	BusinessHoursId	Lookup(Business Hours)		
Case Number	CaseNumber	Auto Number		✓
Case Origin	Origin	Picklist		
Case Owner	OwnerId	Lookup(User,Group)		✓
Case Reason	Reason	Picklist		
Case Source	SourceId	Lookup(Email Message,Messaging Session)		✓
Closed When Created	IsClosedOnCreate	Checkbox		
Contact Email	ContactEmail	Email		

Create A Lightning App

A Lightning App named “EduConsultPro” was created. This app included tabs for Home, Students, Courses, Consultants, Appointments, Registrations, and Cases, providing users with a centralized location to access all functionalities. The app was made available to the System Administrator profile.



Create A ScreenFlow For Student Admission Application Process

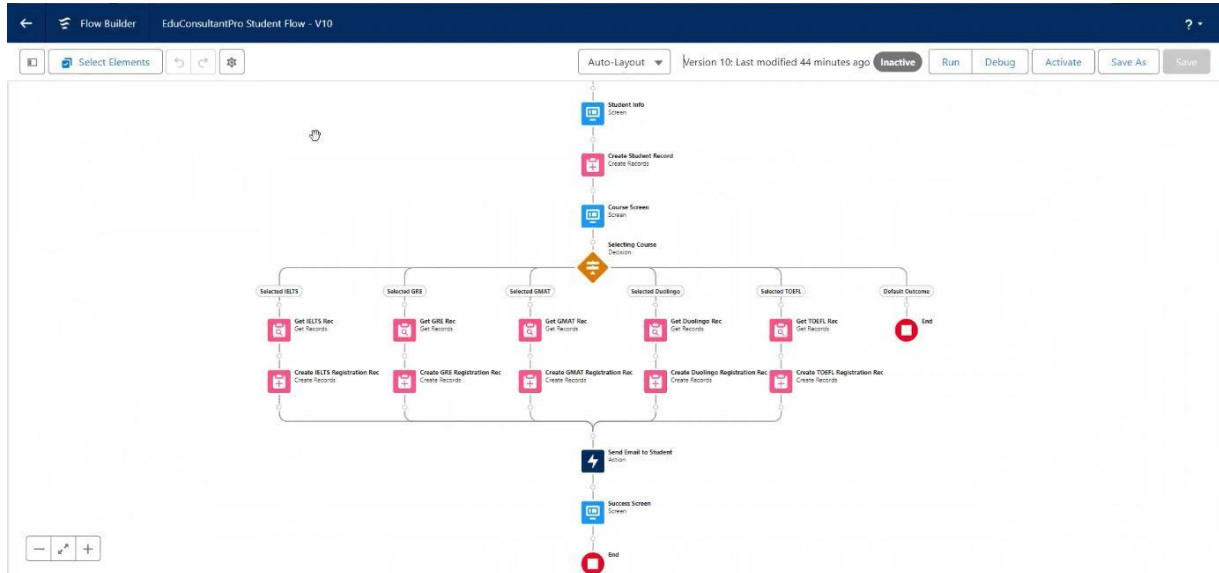
- Add Screen Element (Student Info): A screen element was added to collect student information. This element displayed fields from the Student object. A record variable resource StudentRecordRes was created.
- Create Student Record Using Create Element: A create element, "Create Student Record," was added to create a new Student record using the data collected from the "Student Info" screen.
- Add Screen Element (Course Screen): This screen allows students to select a course (IELTS, GRE, GMAT, Duolingo, TOEFL) from a picklist. Choice variables were created for each course option.

- Add Decision Element (Selecting Course): A decision element checks the selected course from the "Course Screen" and routes the flow based on the selection. Outcomes were defined for each course option (e.g., "Selected IELTS").
- Add GET Record Element: For each course outcome, a Get Record element retrieves the corresponding Course record based on the selected course name.
- Create Registration Record Using Create Records

Element: A create element creates a Registration record, linking the newly created Student record and the retrieved Course record. This was done for each course outcome path.

- Create Email Text Template Variables For Email Body And Subject: Two text template resources were created:
 - StuRegistrationEmailTextTempBody for the email body content.
 - StuRegistrationEmailTextTempSub for the email subject.
- Add An Action Element (Send Email to Student): An email alert action was added to send a registration confirmation email to the student. It utilizes the email templates created in the previous step.

- **Add Screen Element (Success Screen):** A final screen displays a success message to the student.



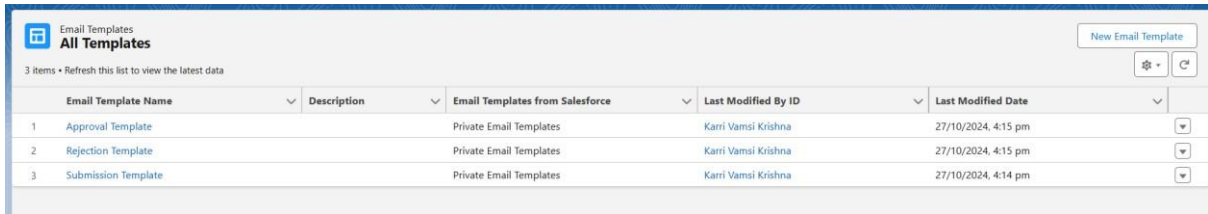
Create Users

- **User:** A new user with the Standard Platform User profile was created.
- **Configure The User Settings:** The new user was assigned a manager in their user settings, essential for the approval process.

<div><div>New User</div><div>Reset Password(s)</div><div>Add Multiple Users</div></div>							
<input type="checkbox"/>	Action	Full Name +	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00dd00000ekekxuad.F9tgmckzgo@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	Consultant	cons	consultant569@example.com		✓	Standard Platform User
<input type="checkbox"/>	Edit	Leela Prasanna Chintalapudi	CLeel	dev256@gmail.com		✓	System Administrator
<input type="checkbox"/>	Edit	User Integration	integ	integration@00dd00000ekekxuad.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User Security	sec	insightssecurity@00dd00000ekekxuad.com		✓	Analytics Cloud Security User
<div><div>New User</div><div>Reset Password(s)</div><div>Add Multiple Users</div></div>							

Create An Approval Process For Property Object (Should be Appointment Object)

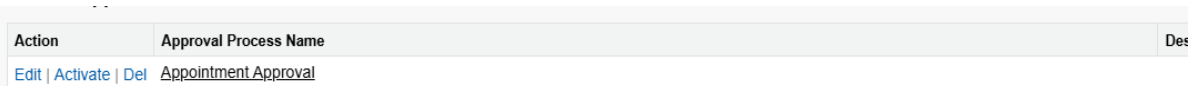
- Create An Email Template: Email templates were created for Submission, Approval, and Rejection stages of the Appointment approval process.



Email Template Name	Description	Email Templates from Salesforce	Last Modified By ID	Last Modified Date
1 Approval Template		Private Email Templates	Karri Vamsi Krishna	27/10/2024, 4:15 pm
2 Rejection Template		Private Email Templates	Karri Vamsi Krishna	27/10/2024, 4:15 pm
3 Submission Template		Private Email Templates	Karri Vamsi Krishna	27/10/2024, 4:14 pm

- Create An Approval Process: An approval process for the Appointment object was configured. The manager of the submitting user was designated as the approver. Record editability properties were set to allow administrators or the assigned approver to edit records during the approval process.

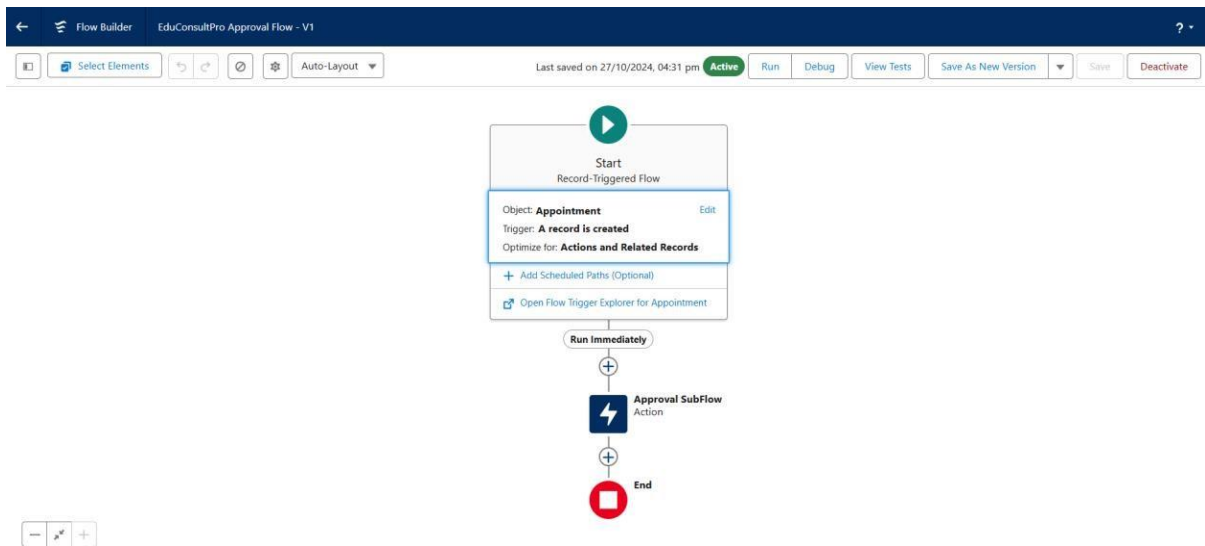
Initial Submission, Final Approval, and Final Rejection actions were configured to update the Appointment record's status and send email notifications using the respective templates.



Action	Approval Process Name	Des
Edit Activate Del	Appointment Approval	

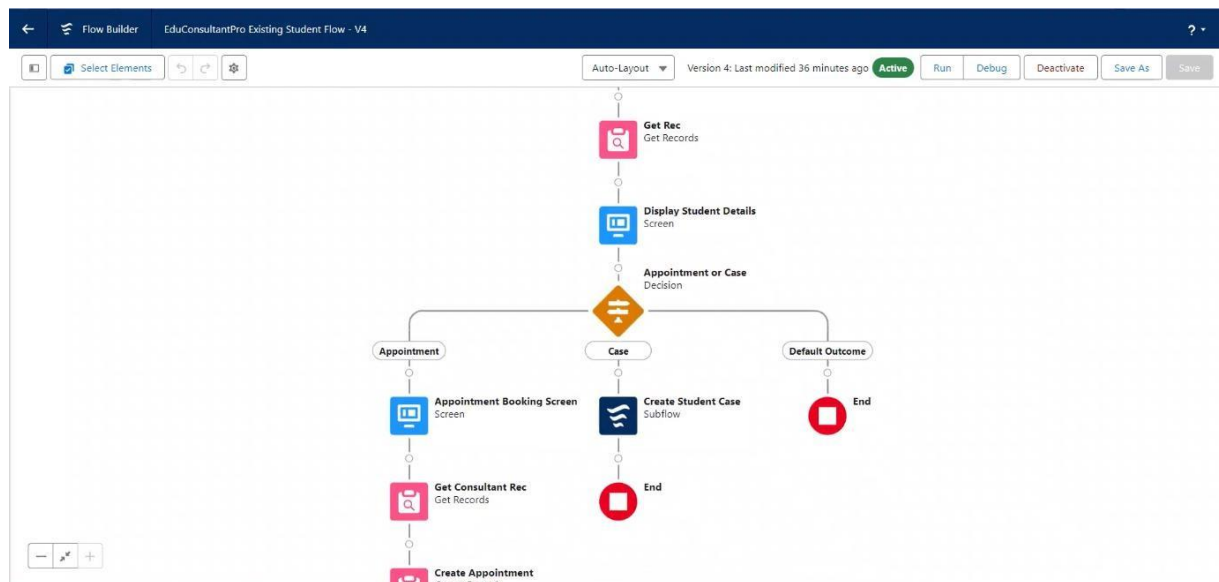
Create A Record Triggered Flow

- Configure The Start Element: A record-triggered flow was initiated, triggering when an Appointment record is created.
- Add An Action Element: An action element was added to submit the newly created Appointment record for approval



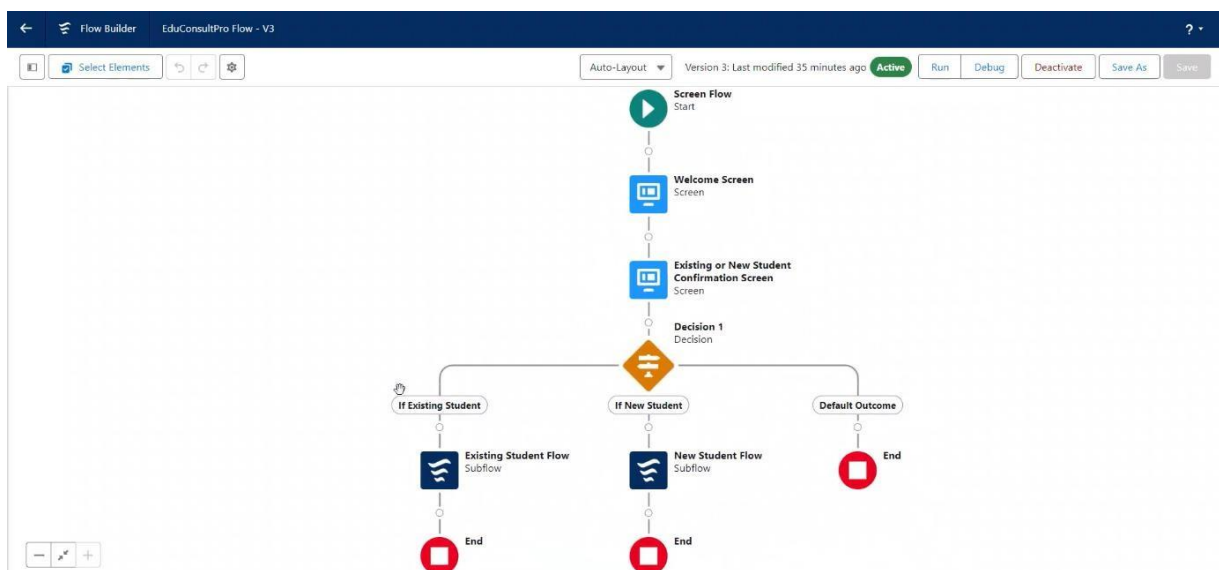
Create A ScreenFlow For Existing Student To Book An Appointment

- Add Screen Element (Get Student Info): Collects existing student's name and email.
- Add GET Record Element (Get Rec): Retrieves the Student record matching the entered name and email.
- Add Decision Element (Appointment or Case): Determines whether the student wants to book an appointment or create a case (this branch of the flow wasn't fully described in the original instructions, so requires further definition). Presumably, a screen would be needed before this decision element to offer those choices.
- Add Screen Element (Appointment BookingScreen): Displays fields from the Appointment object for the student to fill in. AppointmentRecordRes resource is used.
- Add GET Record Element (Get Consultant Rec): Retrieves the Consultant record based on the selected consultant name.
- Create Appointment Record Using Create Records Element (Create Appointment): Creates an Appointment record with details provided.
- Add Screen Element (Confirmation Screen): Displays confirmation message with appointment details.
- Add An SubFlow Element (Create Student Case): (This was under the "Case" path of the Decision element and requires further definition, assuming it involves creating a Case record if the student chose that option).



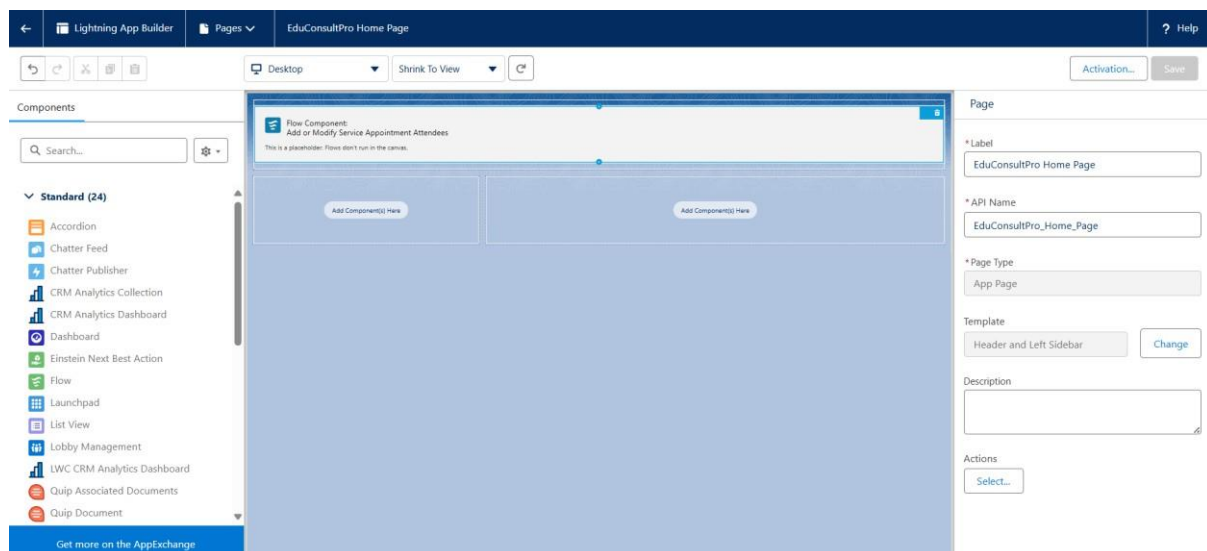
Create A ScreenFlow To Combine All The Flows At One Place

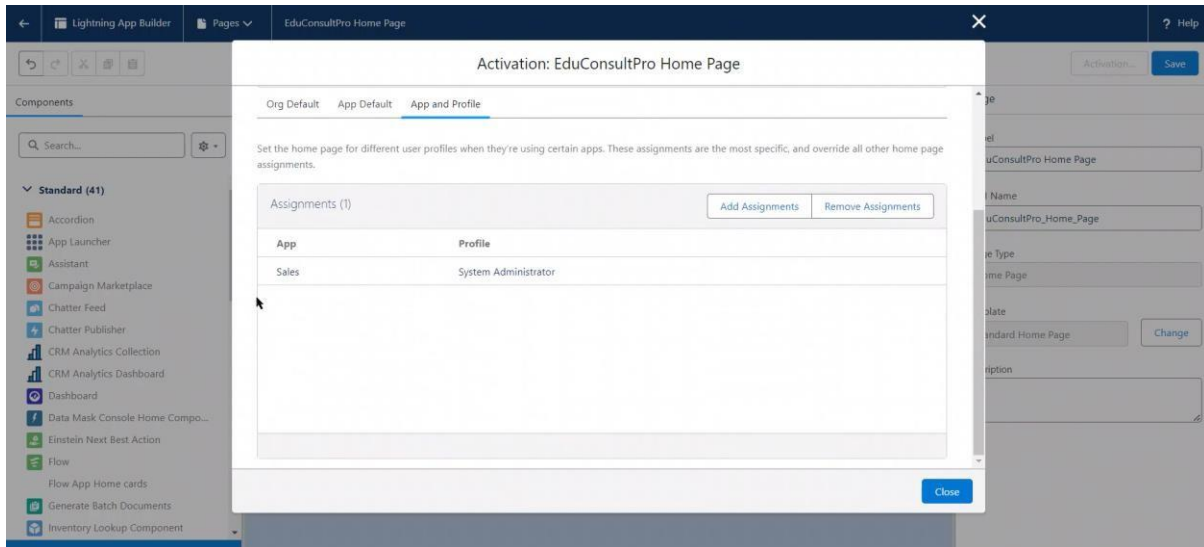
- Add Screen Element (Welcome Screen): Displays a welcome message.
- Add Screen Element (Existing or New Student Confirmation Screen): Asks the user if they are an existing student.
- Add Decision Element (Decision 1): Routes the flow based on user input (Existing/New Student).
- Add An SubFlow Element (Existing Student Flow / New Student Flow): Calls the respective Subflow based on the decision element outcome (Student Admission flow or Existing Student Appointment booking flow).



Create A Lightning App Page

- Create a Lightning App Page: A Lightning app page "EduConsultPro Home Page" was created and configured as the default Home page for the "Sales" app and assigned to the System Administrator profile. This page displayed the Combined Flow.





5. Key Scenarios Addressed by Salesforce in the Implementation Project

- **Admission Application Management:** Prospective students can submit applications online, receive automated confirmations, and admissions staff can track and analyze application data.
- **Consulting Services Management:** Students submit consulting requests online, consultants manage requests through an approval process, and appointments are scheduled within Salesforce.
- **Immigration Case Management:** Students initiate immigration cases via multiple channels, and agents manage cases with tracking and documentation features in Salesforce.
- **Property Approval Process:** Automated approval workflow for Property object, with relevant alerts for streamlined review and approval.
- **Integrated User Flows:** Consolidated ScreenFlow enabling admissions staff to access all flows, including applications, consulting, and immigration, from one interface.

6. Conclusion

Summary of Achievements

The CRM solution for EduConsultPro Institute successfully centralizes and automates admissions, consulting, and immigration management. By incorporating custom objects, automated flows, approval processes, and consolidated user flows, EduConsultPro can deliver a more efficient and transparent service experience to prospective students while empowering staff with powerful Salesforce tools and insights.