

A CRM Application to Manage the Services offered by an Institution

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1. Project Overview

This project, titled "A CRM Application to Manage the Services Offered by an Institution," is designed to address the challenges faced by EduConsultPro Institute in managing its growing volume of admissions, student inquiries, consulting services, and immigration cases. The goal is to deliver a comprehensive solution by leveraging the Salesforce CRM platform, providing a seamless, integrated approach for student engagement and administrative efficiency. Through this project, we aim to enhance operational efficiency, streamline communication, and improve user experience for both prospective students and the admissions team, supporting the long-term objectives of EduConsultPro Institute in delivering exceptional educational and consulting services.

2. Objectives

- **Business Goals:**

1. Streamline the admissions process to handle an increasing number of applicants effectively.
2. Enhance engagement and responsiveness in consulting services and immigration case management.
3. Improve operational efficiency for admissions and administrative staff, reducing processing time and enhancing student experience.

- **Specific Outcomes:**

1. Admission Application Management: Implement an online admission form linked to Salesforce CRM, allowing students to submit applications directly. Enable automated email notifications and generate reports to track application metrics, acceptance rates, and enrollment trends.

2. **Approval Process:** Establish a Salesforce-based approval process for consulting requests with automatic email alerts for approved or rejected statuses, ensuring timely communication.
3. **Consulting Services Management:** Facilitate consulting requests with automated notifications to consultants and enable appointment scheduling and tracking within Salesforce, including real-time status updates (scheduled, completed, canceled).
4. **Immigration Case Management:** Implement a case submission form, integrate document management, and track case status to manage immigration inquiries efficiently, enhancing service accuracy and response time.

3. Salesforce Key Features and Concepts Utilized

- **Objects and Data Modeling:**

Custom objects for Admissions, Consulting Requests, and Immigration Cases were created to store and organize essential student and application data.

- **Process Builder and Automation:**

Automated workflows were developed to streamline admission notifications, consulting request approvals, and immigration case updates, reducing manual work and improving response times.

- **Approval Processes:**

Approval workflows were implemented for consulting requests, allowing students to receive automated status updates and staff to manage approvals directly in Salesforce.

- **Email Alerts and Notifications:**

Automated email notifications were set up for key actions, including application submission confirmation, consulting request updates, and immigration case notifications, ensuring timely communication with students and staff.

- **Reports and Dashboards:**

Custom reports and dashboards were created to provide admissions staff with insights into application metrics, consulting trends, and immigration case statuses, supporting data-driven decision-making.

- **Appointment Scheduling:**

Built-in scheduling within Salesforce allowed consultants to manage consulting appointments with students, tracking dates, times, and appointment purposes.

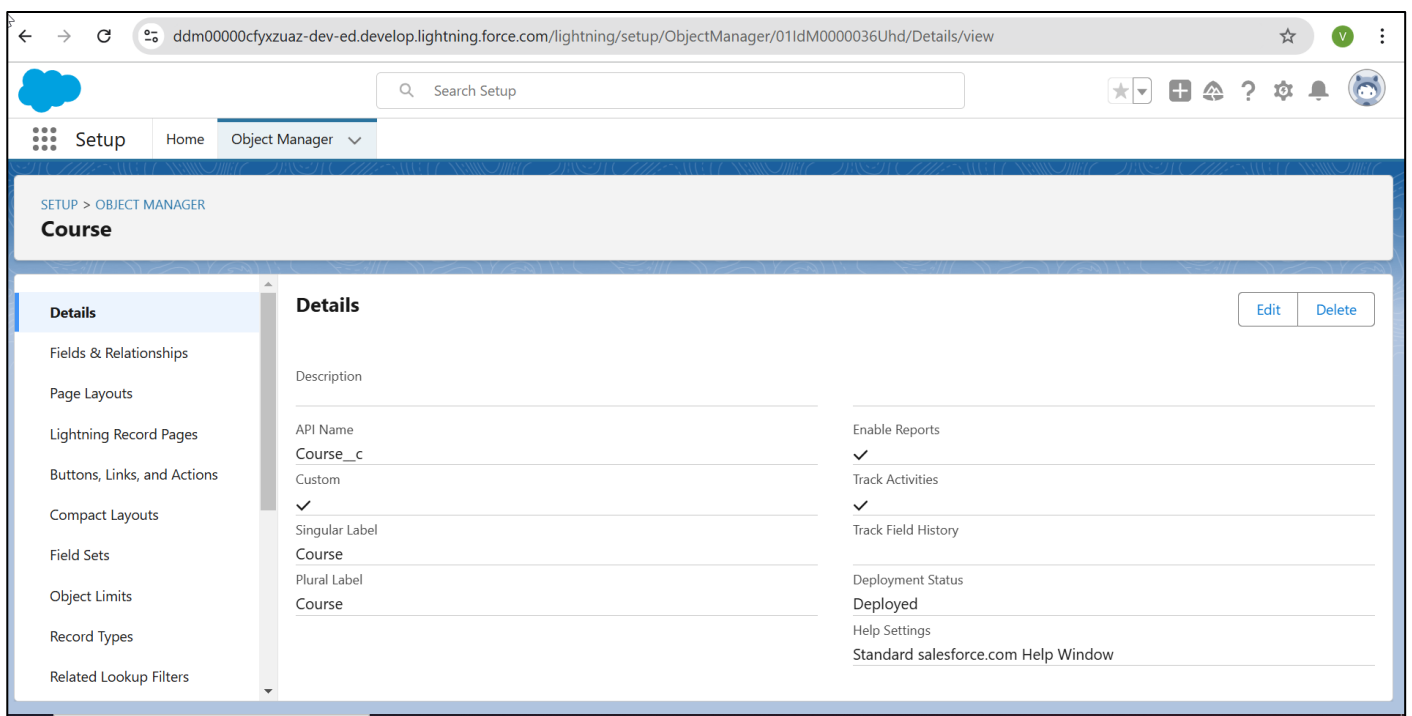
- **Case Management for Immigration:**

Salesforce's case management features enabled efficient tracking and updating of immigration case statuses, along with integrated document management and collaboration tools for case processing.

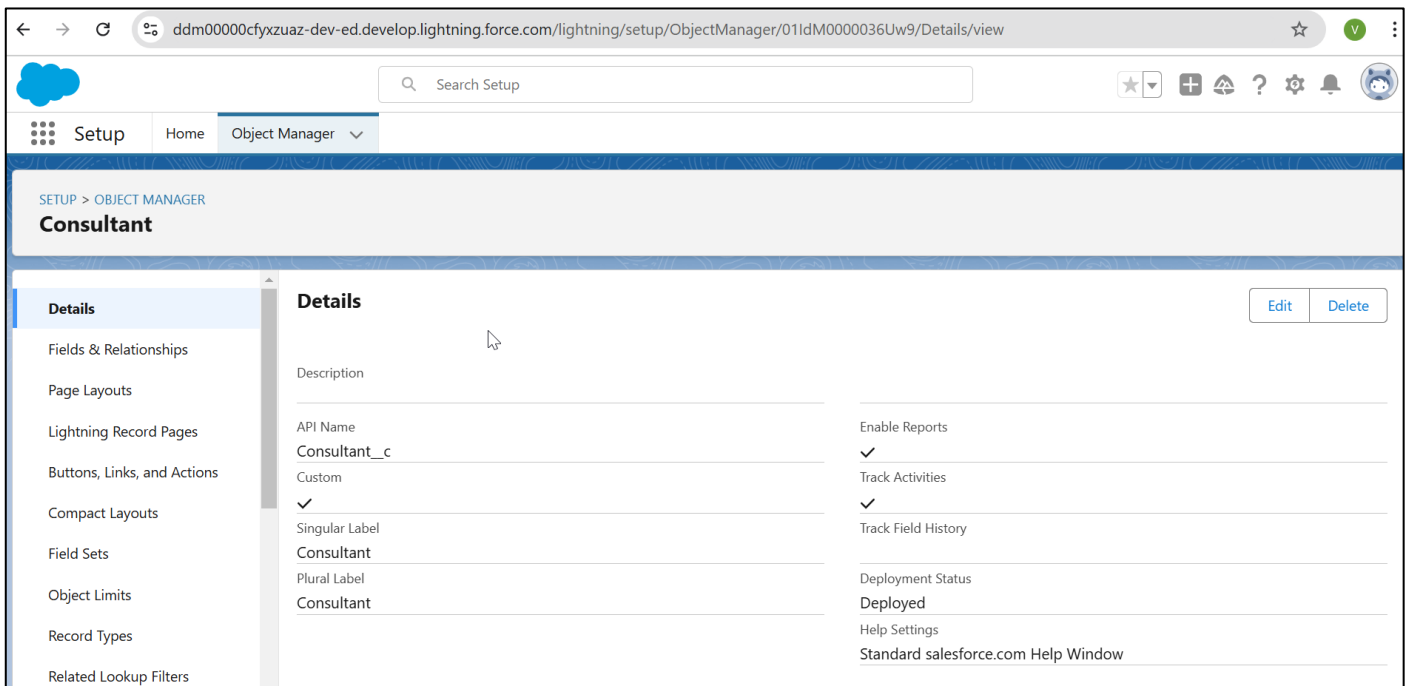
4. Detailed Steps to Solution Design

1. Create Objects from Spreadsheet

- **Create Course object**



• Consultant object



ddm00000cfyxuaz-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM0000036Uw9/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Consultant

Details Edit Delete

Description

API Name
Consultant__c

Custom
✓

Singular Label
Consultant

Plural Label
Consultant

Enable Reports
✓

Track Activities
✓

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

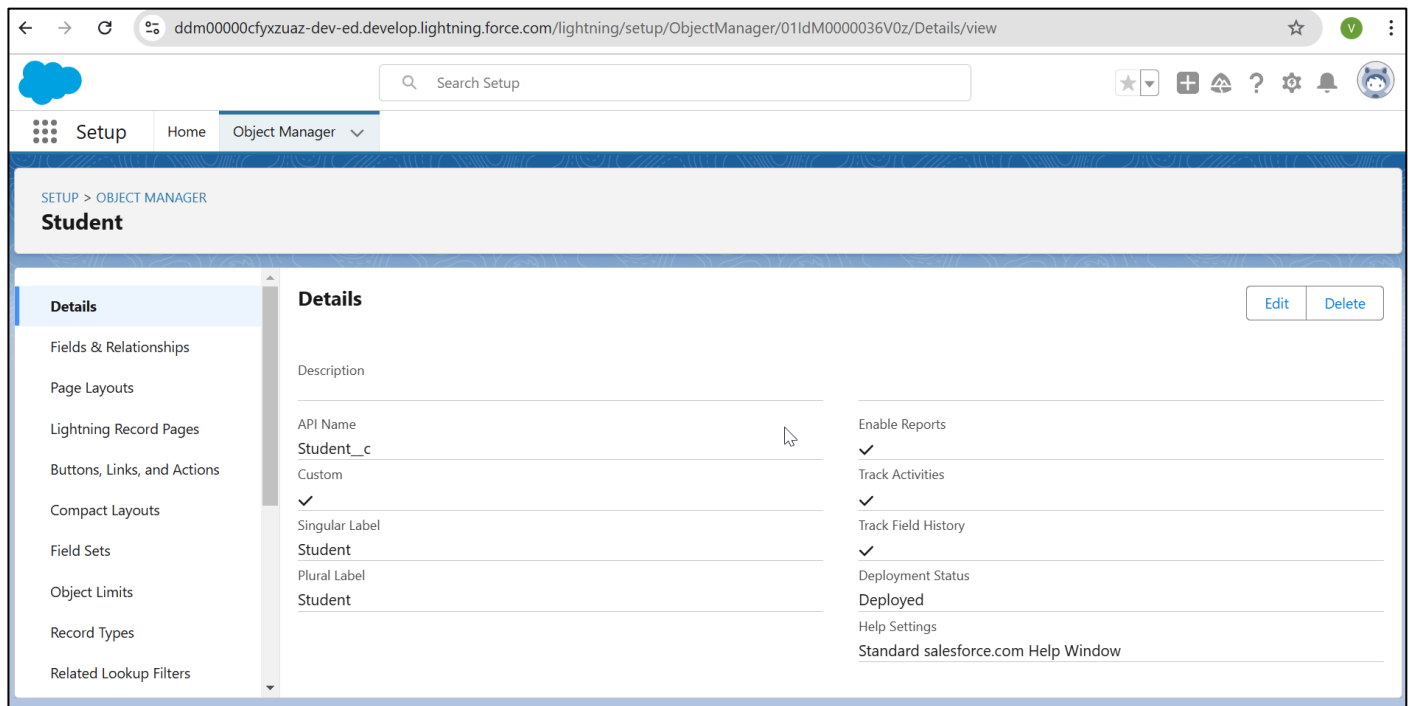
Field Sets

Object Limits

Record Types

Related Lookup Filters

• Student object



ddm00000cfyxuaz-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM0000036V0z/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Student

Details Edit Delete

Description

API Name
Student__c

Custom
✓

Singular Label
Student

Plural Label
Student

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

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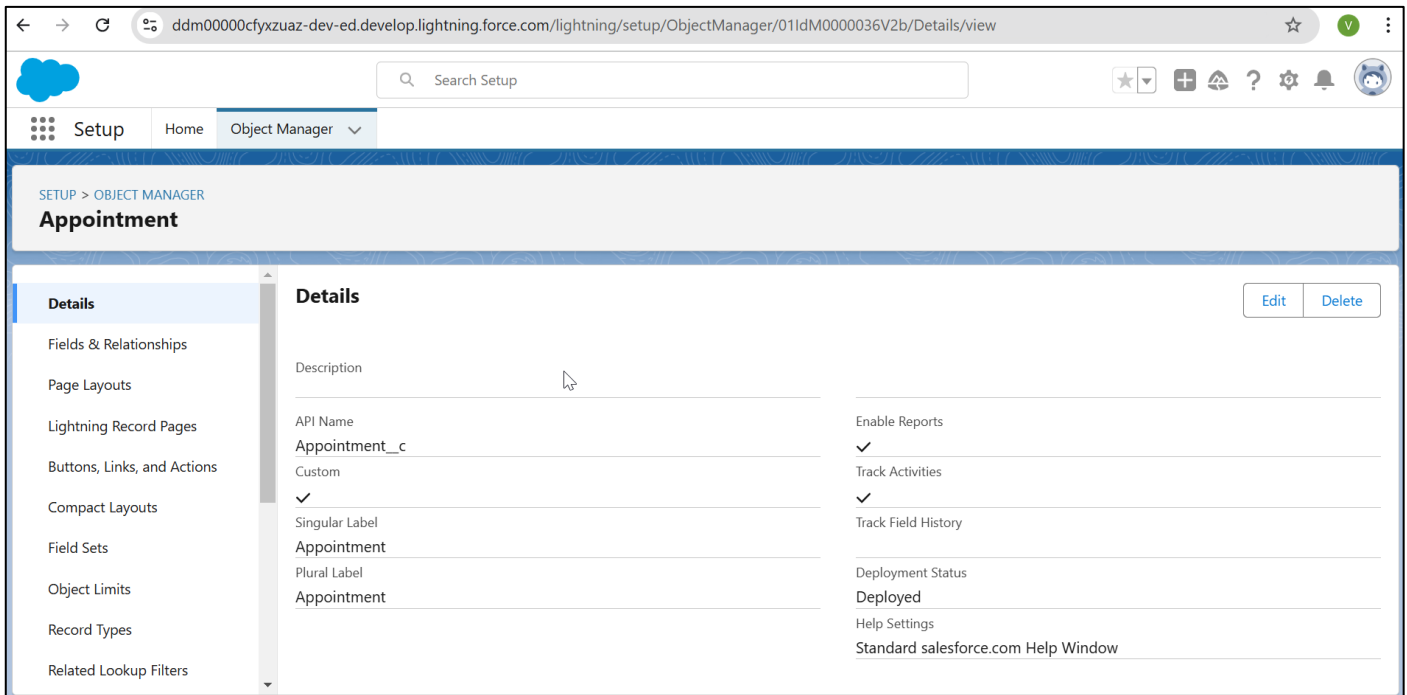
Field Sets

Object Limits

Record Types

Related Lookup Filters

• Appointment object

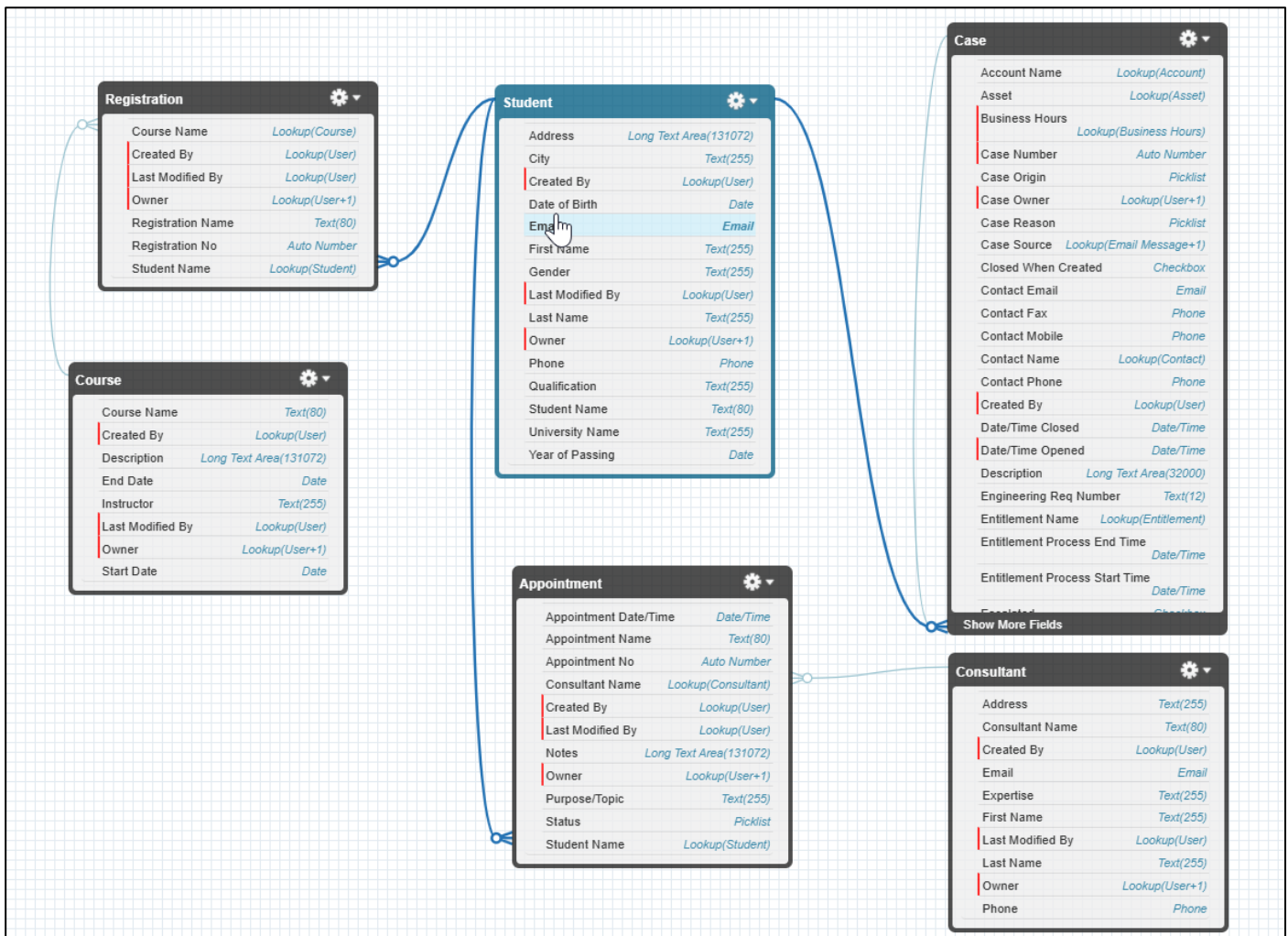


The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Appointment' and includes a 'Details' section with the following information:

- Description: (Empty text area)
- API Name: Appointment_c
- Custom: ☒
- Singular Label: Appointment
- Plural Label: Appointment
- Enable Reports: ☒
- Track Activities: ☒
- Track Field History: ☒
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

2. Create Relationship among the objects



3. Configure the Case Object

ddm00000cfyxzuaz-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Status/view

Search Setup

Setup Home Object Manager

SETUP > 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

Record Types

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

Case Status Picklist Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Case Status Picklist Values Help](#)

Action	Values	API Name	Closed	Default	Chart Colors	Modified By
Edit Del Deactivate	New	New	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assigned dynamically	VETRIVELM, 26/09/2024, 5:07 pm
Edit Del Deactivate	Working	Working	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	VETRIVELM, 26/09/2024, 5:07 pm
Edit Del Deactivate	Escalated	Escalated	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	VETRIVELM, 26/09/2024, 5:07 pm
Edit Del Deactivate	Closed	Closed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	VETRIVELM, 26/09/2024, 5:07 pm
Edit Del Deactivate	Open	Open	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	VETRIVELM, 07/11/2024, 7:56 pm
Edit Del Deactivate	In-progress	In-progress	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	VETRIVELM, 07/11/2024, 7:56 pm

Inactive Values

No Inactive Values values defined.

ddm00000cfyxzuaz-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Type/view

Search Setup

Setup Home Object Manager

SETUP > 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

Record Types

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

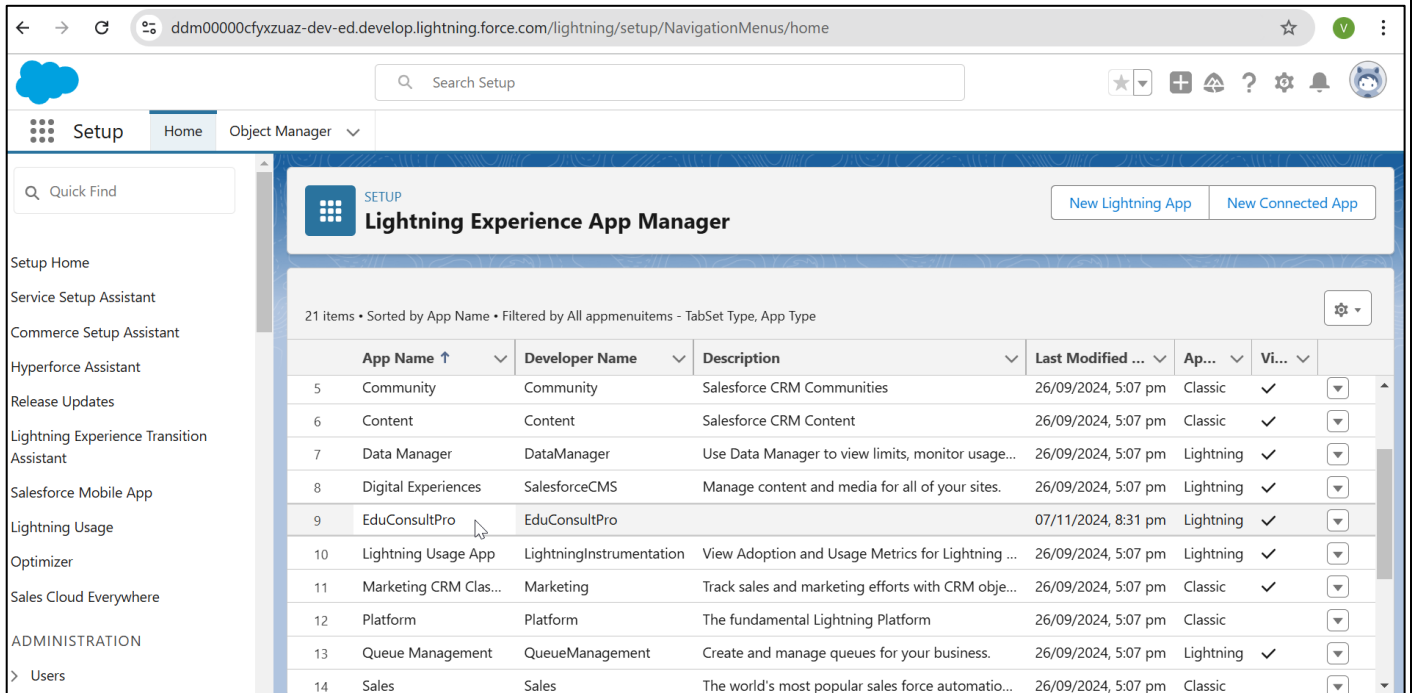
Case Type Picklist Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Case Type Picklist Values Help](#)

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Mechanical	Mechanical	<input type="checkbox"/>	Assigned dynamically	VETRIVELM, 26/09/2024, 5:07 pm
Edit Del Deactivate	Electrical	Electrical	<input type="checkbox"/>	Assigned dynamically	VETRIVELM, 26/09/2024, 5:07 pm
Edit Del Deactivate	Electronic	Electronic	<input type="checkbox"/>	Assigned dynamically	VETRIVELM, 26/09/2024, 5:07 pm
Edit Del Deactivate	Structural	Structural	<input type="checkbox"/>	Assigned dynamically	VETRIVELM, 26/09/2024, 5:07 pm
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	Assigned dynamically	VETRIVELM, 26/09/2024, 5:07 pm
Edit Del Deactivate	Immigration	Immigration	<input type="checkbox"/>	Assigned dynamically	VETRIVELM, 07/11/2024, 7:54 pm
Edit Del Deactivate	Visa Application	Visa Application	<input type="checkbox"/>	Assigned dynamically	VETRIVELM, 07/11/2024, 7:54 pm

Inactive Values

No Inactive Values values defined.

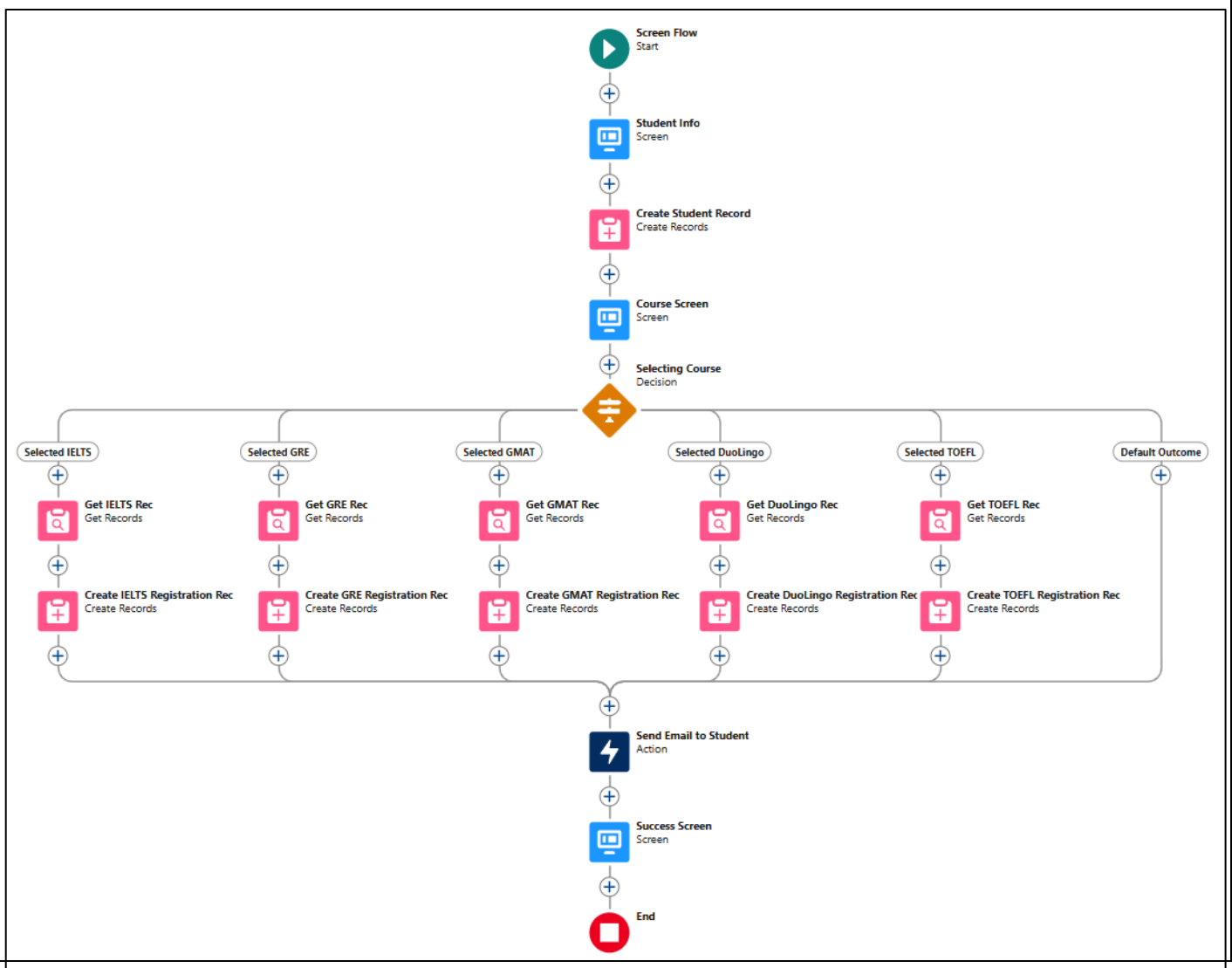
4. Create a Lightning App




The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays a list of 21 items, sorted by App Name. The table below represents the data shown in the screenshot:

App Name	Developer Name	Description	Last Modified	Ap...	Vi...
5 Community	Community	Salesforce CRM Communities	26/09/2024, 5:07 pm	Classic	✓
6 Content	Content	Salesforce CRM Content	26/09/2024, 5:07 pm	Classic	✓
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage...	26/09/2024, 5:07 pm	Lightning	✓
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	26/09/2024, 5:07 pm	Lightning	✓
9 EduConsultPro	EduConsultPro		07/11/2024, 8:31 pm	Lightning	✓
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning ...	26/09/2024, 5:07 pm	Lightning	✓
11 Marketing CRM Clas...	Marketing	Track sales and marketing efforts with CRM obje...	26/09/2024, 5:07 pm	Classic	✓
12 Platform	Platform	The fundamental Lightning Platform	26/09/2024, 5:07 pm	Classic	✓
13 Queue Management	QueueManagement	Create and manage queues for your business.	26/09/2024, 5:07 pm	Lightning	✓
14 Sales	Sales	The world's most popular sales force automatio...	26/09/2024, 5:07 pm	Classic	✓

5. Create a ScreenFlow for Student Admission Application process.



6. Create Users


SETUP
Users


<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit Login	Adanna, Diya	dadad	test_diya_pas.4w8bjybi9wik.tszgrgsbkpx.3gi8ofovzwn.ug539fgvmm1e@salesforece.com		✓	UMS User
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00ddm0000cfyxzuaz.th9rliveyc4@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit Login	Concepción Morales, María	mconc	m_c_morales.no.reply.10.07068458291328.bjsbfjwxqlb.rsrlowgbhdyr@salesforece.com	Research Team	✓	Research Users
<input type="checkbox"/>	Edit Login	Consultant	cons	consultant@gmail.com		✓	Standard Platform User
<input type="checkbox"/>	Edit Login	Ellington, Amelia	aelli	amelia.ellington.1.46kxcp9oodih.d6cwpdcuo4wh.qnv6esqnxvcz@salesforece.com		✓	Force.com - Free User
<input type="checkbox"/>	Edit Login	Figueroa, Jose	jfigu	j_figueroa.no.reply.22.69314487405014.upvvogblq6ui.86veknzpz6b0@salesforece.com	Research Manager	✓	Research Manager
<input type="checkbox"/>	Edit	M. VETRIVEL	VM	vetrivel@salesforece.com	SF Admin	✓	System Administrator
<input type="checkbox"/>	Edit	Oliveira, Leonardo	mconc	l.oliveira.no.reply.5.919560845016536.4ctvtijxxup4.vcxqqh5srnla@salesforece.com	Research Team	<input type="checkbox"/>	Research Users
<input type="checkbox"/>	Edit	User, Integration	integ	integration@00ddm0000cfyxzuaz.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User, Security	sec	insightssecurity@00ddm0000cfyxzuaz.com		✓	Analytics Cloud Security User


[New User](#)
[Reset Password\(s\)](#)
[Add Multiple Users](#)

7. Create an Approval Process for Property Object

• Create an Email Template

[←](#)
[→](#)
[↺](#)
[ddm0000cfyxzuaz-dev-ed.develop.lightning.force.com/lightning/o/EmailTemplate/home](#)




EduConsultPro

[Home](#)
[Student](#)
[Course](#)
[Consultant](#)
[Appointment](#)
[Registration](#)
[Cases](#)
[* Email Templates](#)

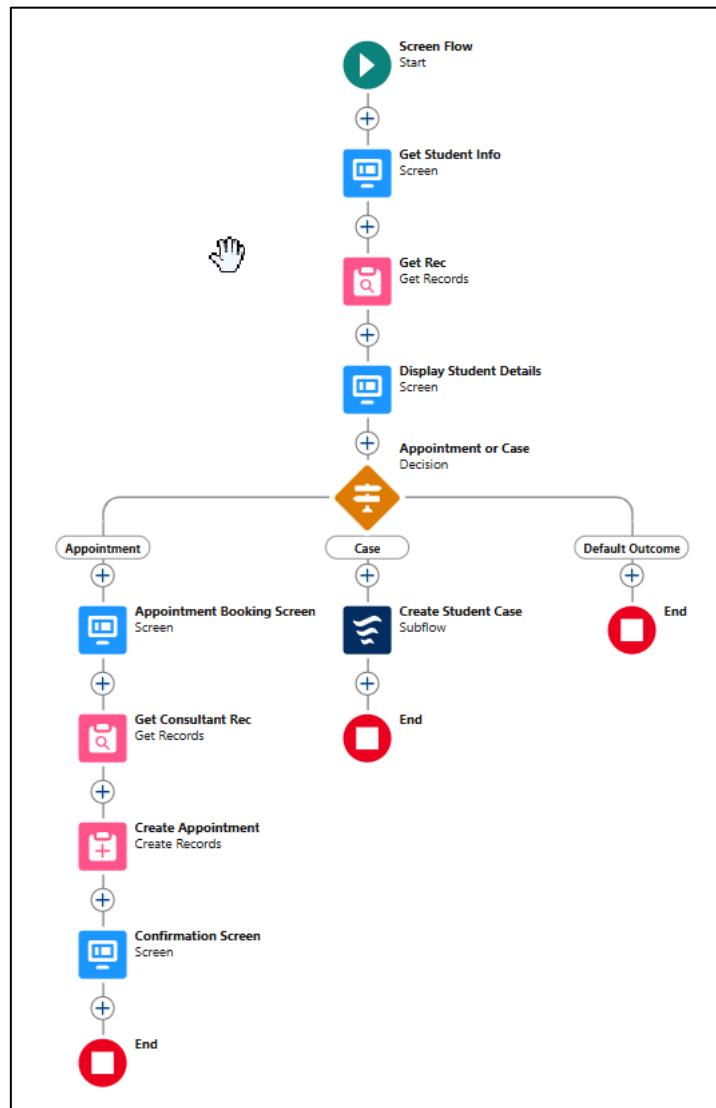
Email Templates
Recent
5 items

[New Email Template](#)
[New Folder](#)

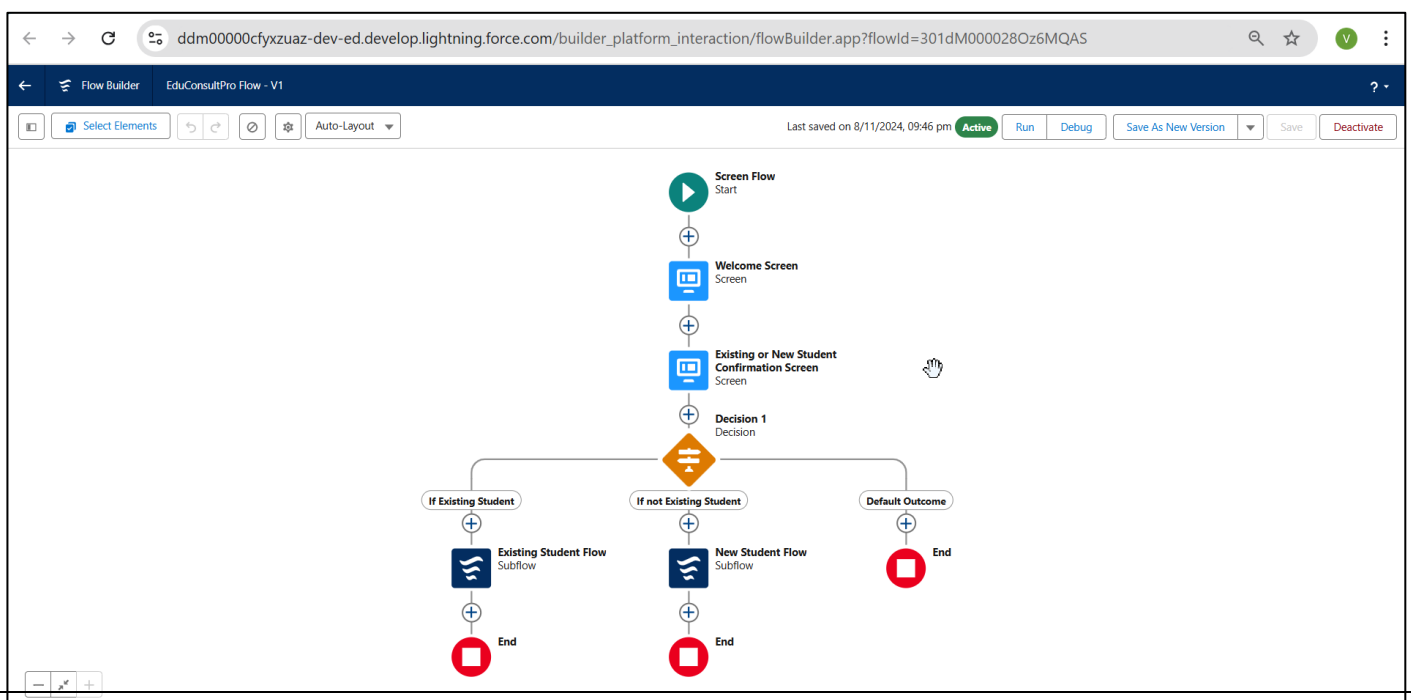
EMAIL TEMPLATES	Email Template Name	Description	Folder	Last Modified By	Last Modified Date
Recent	Approval Template		Desired	VETRIVEL M	9/11/2024, 11:54 am
Created by Me	Rejection Template		Desired	VETRIVEL M	9/11/2024, 11:54 am
	Submission Template		Desired	VETRIVEL M	9/11/2024, 11:54 am
Private Email Templates	Enhancement Request Approved	Enhancement Request Approval email template	Public Email Templates	VETRIVEL M	26/9/2024, 5:07 pm
Public Email Templates	New Enhancement Request	New Enhancement Request email template	Public Email Templates	VETRIVEL M	26/9/2024, 5:07 pm
All Email Templates					

FOLDERS
All Folders
Created by Me
Shared with Me

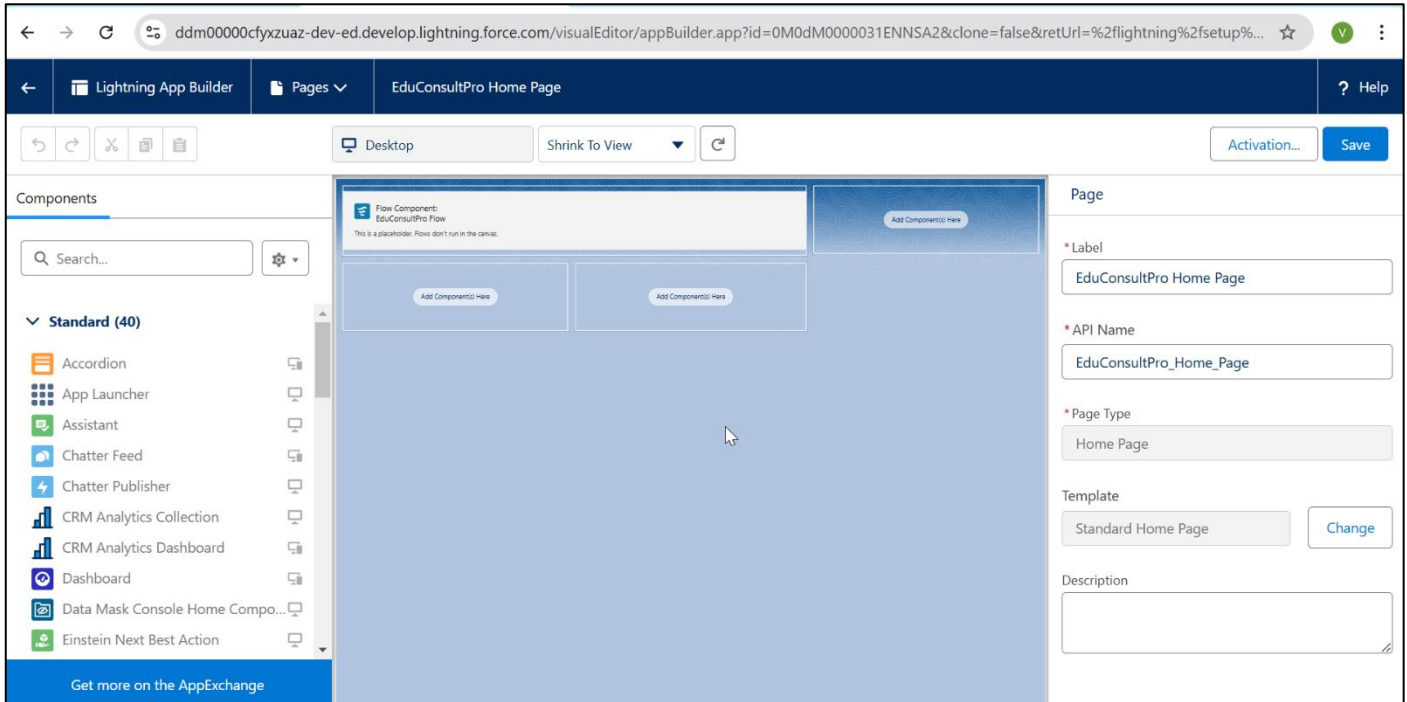
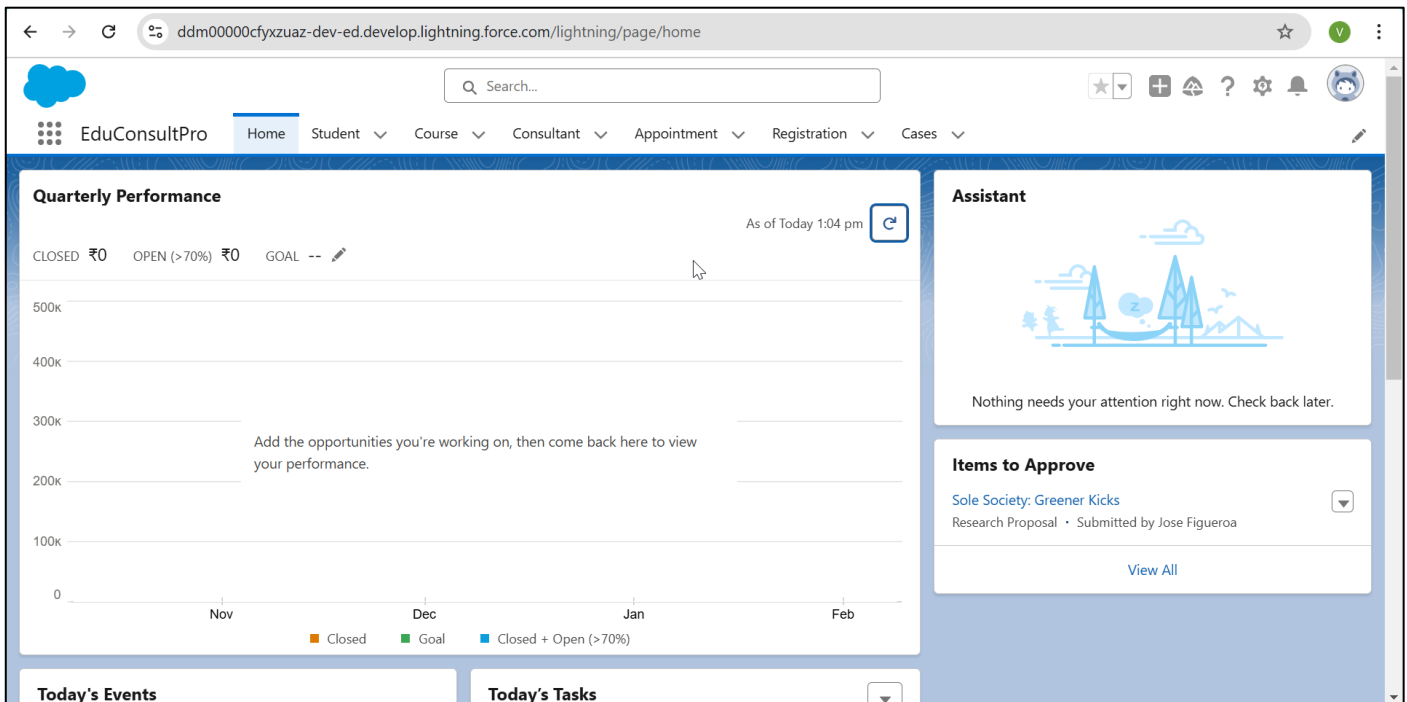
9. Create a ScreenFlow for Existing Student to Book an Appointment



10. Create a ScreenFlow to Combine all the flows at one place



11. Create a lightning app page

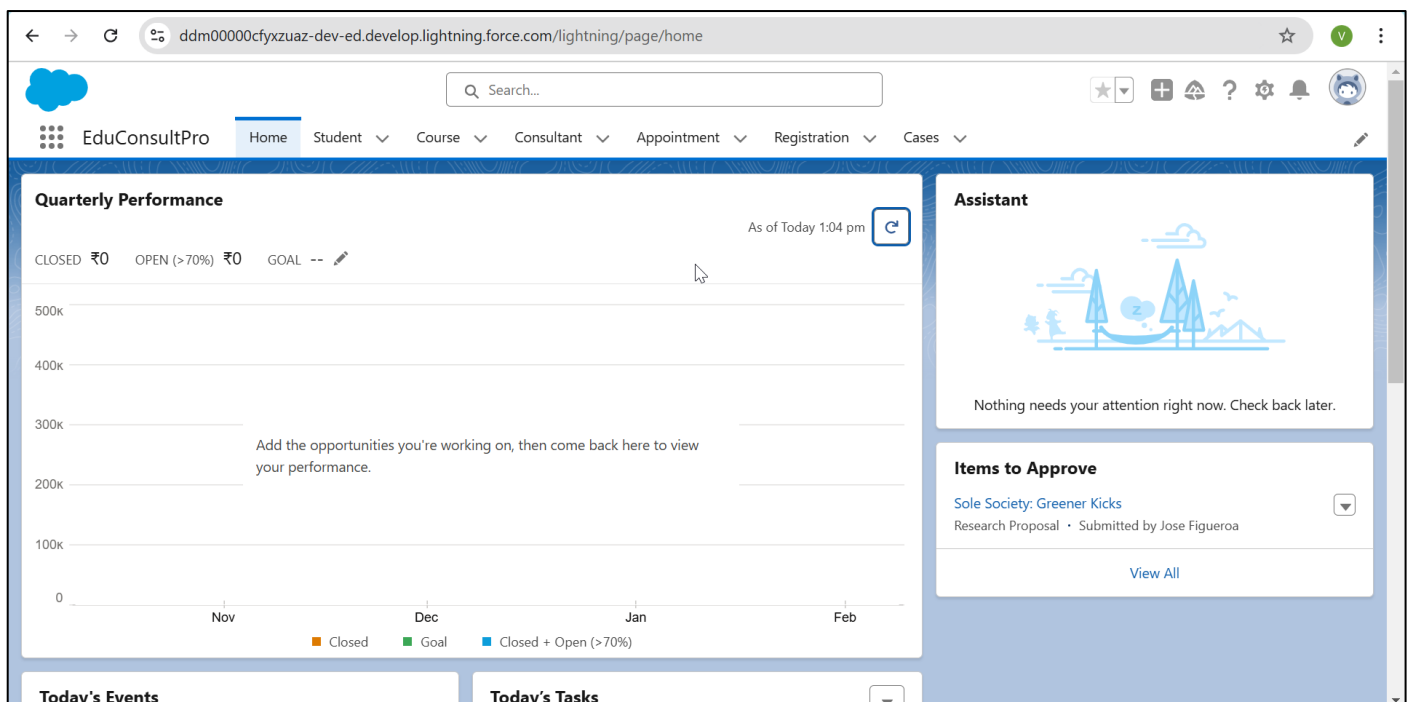
5. Testing and Validation

• User Interface Testing

User interface (UI) testing was conducted to validate that users can interact with the system smoothly and that all forms, fields, buttons, and screens function correctly. The UI testing ensured that the CRM interface meets user expectations and provides an intuitive experience.

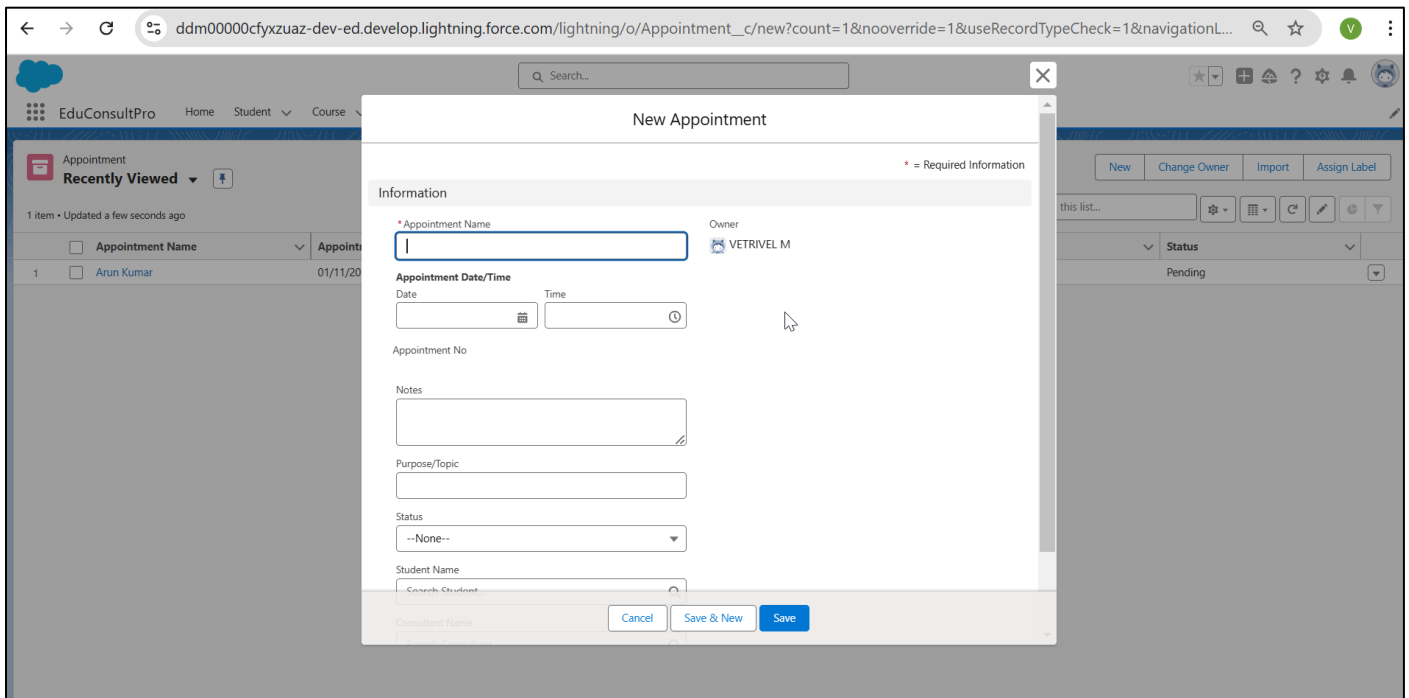
▪ Dashboard and Report Accessibility:

Tested dashboards and reports to ensure they load correctly, reflect real-time data, and are accessible to users with appropriate permissions.



▪ Lightning App Navigation:

Validated that users could navigate seamlessly across tabs for Appointment, Courses, Consulting Requests, and Immigration Cases without performance issues.



6. Key Scenarios Addressed by Salesforce in the Implementation Project

The Salesforce CRM solution for EduConsultPro Institute efficiently addresses various scenarios related to student appointments, consulting requests, and immigration case management, supporting the institution's services.

Appointment Scheduling and Management

- **Scenario:** Students book appointments to explore courses or receive guidance from admissions staff.
- **Solution:** Salesforce captures and manages all appointment details, including scheduling, rescheduling, and tracking appointment statuses (e.g., scheduled, completed).

Automated Approval Process for Consulting Requests

- **Scenario:** Prospective students request consulting sessions, which require staff review and approval.
- **Solution:** An automated approval process in Salesforce handles consulting requests, sending notifications to students upon approval or rejection, reducing manual oversight.

Consulting Appointment Management

- **Scenario:** Students require consulting sessions for expert guidance.
- **Solution:** Salesforce stores consulting requests, enabling advisors to manage and schedule sessions. Tracking features within Salesforce monitor appointment statuses to maintain organized follow-ups.

Immigration Case Management

- **Scenario:** Students submit immigration-related cases, requiring case processing and tracking.
- **Solution:** Salesforce captures each case and tracks its progress, providing tools for secure document management and case updates.

Reporting and Metrics for Appointments and Consulting

- **Scenario:** Staff need insights into appointment and consulting metrics for performance evaluation.
- **Solution:** Salesforce dashboards and reports provide metrics on appointments and consulting sessions, aiding strategic planning and service improvement.

7. Conclusion

Summary of Achievements:

The Salesforce CRM implementation for EduConsultPro Institute successfully fulfilled critical requirements, enhancing the institution's ability to manage its services effectively.

1. **Admission Application Management:** Prospective students can now seamlessly submit detailed admission applications through the institute's online portal. Salesforce captures each application, triggering automated email notifications to applicants and allowing admissions staff to easily analyze data through customized reports and dashboards on metrics such as acceptance rates and enrollment trends.
2. **Approval Process for Consulting Requests:** The project implemented an automated approval process within Salesforce for consulting requests. With email alerts notifying students of request approvals or rejections, this streamlined process ensures timely communication and reduced manual effort by admissions staff.

3. **Consulting Services Management:** The solution enables prospective students to request consulting services directly through the institute's portal. Consultants receive automated notifications and can schedule, manage, and track appointments with ease within Salesforce. Appointment statuses are updated in real-time, ensuring both students and consultants stay informed.
4. **Immigration Case Management:** For immigration support, students can initiate cases via multiple channels. Salesforce captures all case details, notifies immigration agents upon submission, and tracks case statuses (open, in progress, closed). Document management and collaboration features ensure that cases are processed efficiently and transparently.

Through these capabilities, Salesforce CRM has not only streamlined operations but also improved the overall experience for both students and staff. The solution has enhanced service transparency, facilitated real-time tracking, and empowered staff with data-driven insights, positioning EduConsultPro Institute to meet its growing demand more effectively.