

## A CRM Application to Manage the Services offered by an Institution

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**College Name:** Arunai Engineering College

**College Code:** 5104

**GitHub Repo link:** <https://github.com/m-vetrivel/NM-Project>

**Demo Video link:**

<https://drive.google.com/file/d/1uQjzvK79MiKjt9swxcHy2I-88czpPAoG/view?usp=sharing>

## 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.

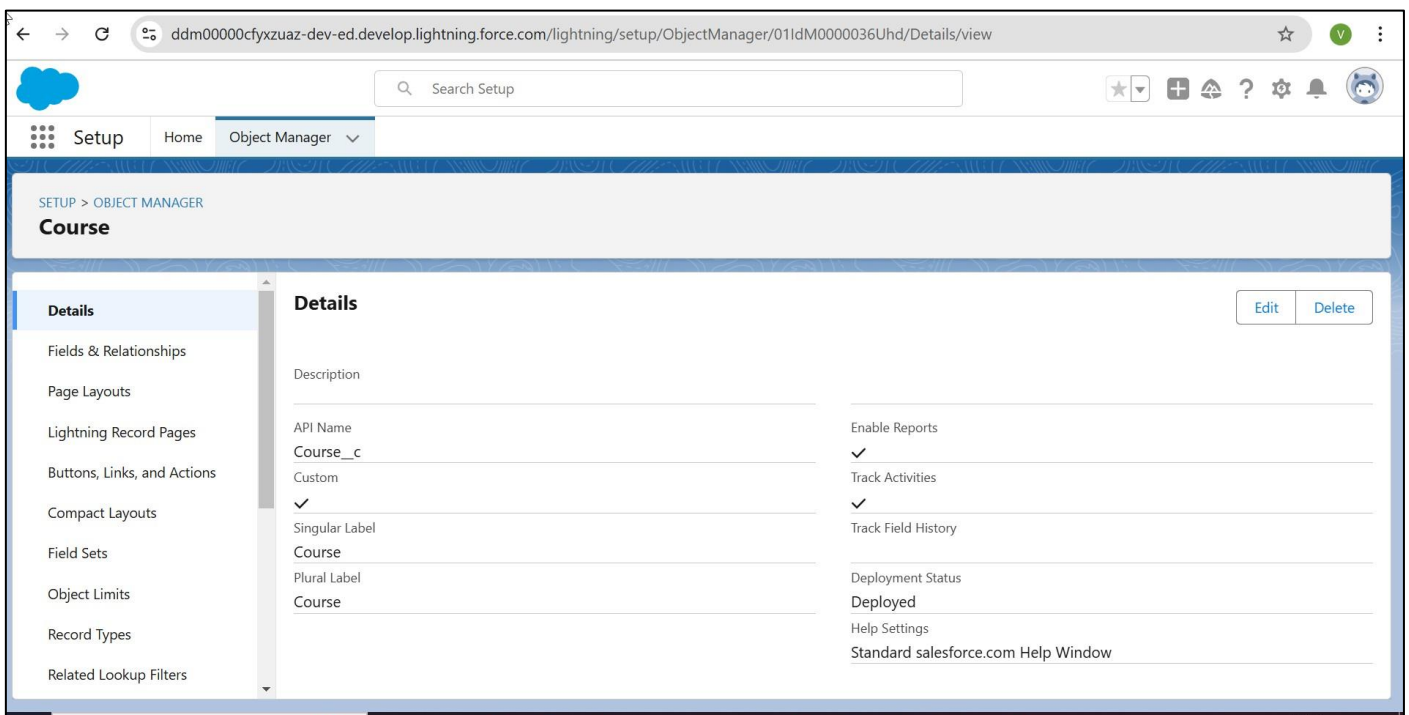
- **Case Management for Immigration:**

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.

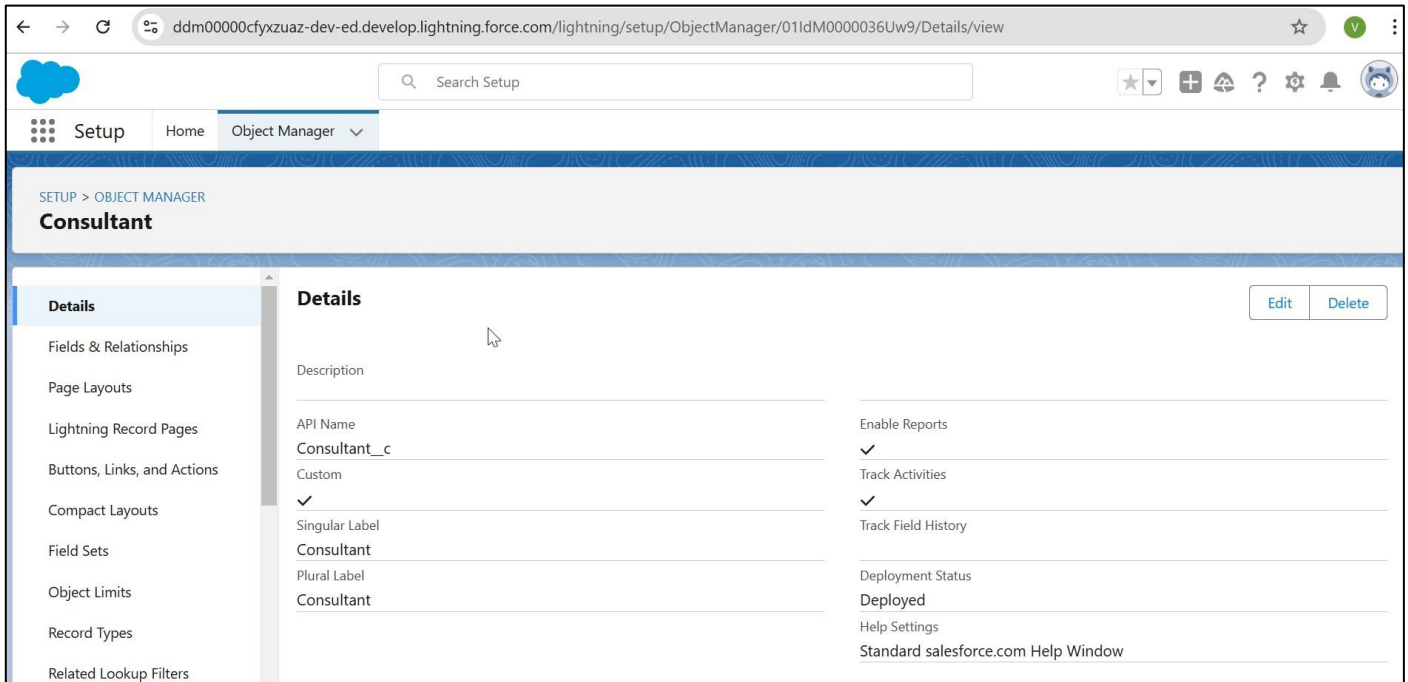
## 4. Detailed Steps to Solution Design

### 1. Create Objects from Spreadsheet

- **Create Course object**



## • Consultant object

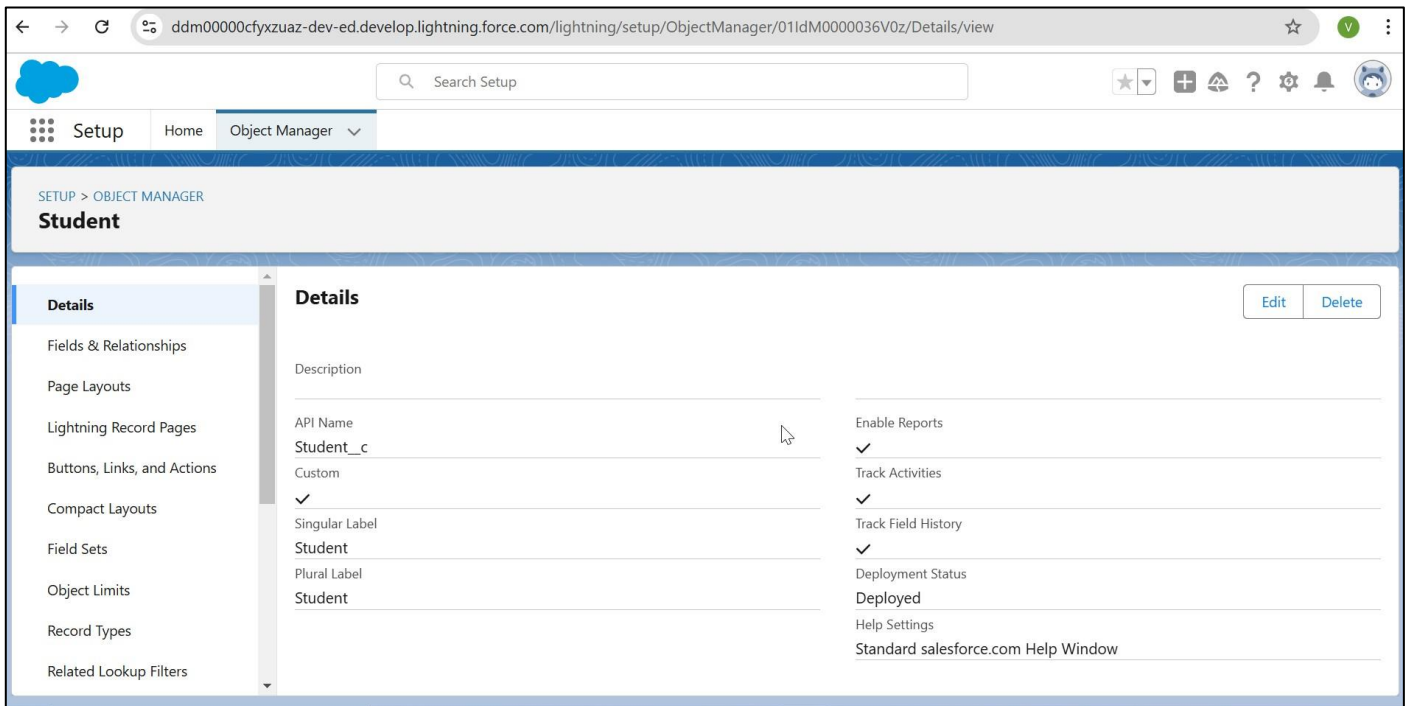


The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types,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

- 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](#)

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

## • Student object

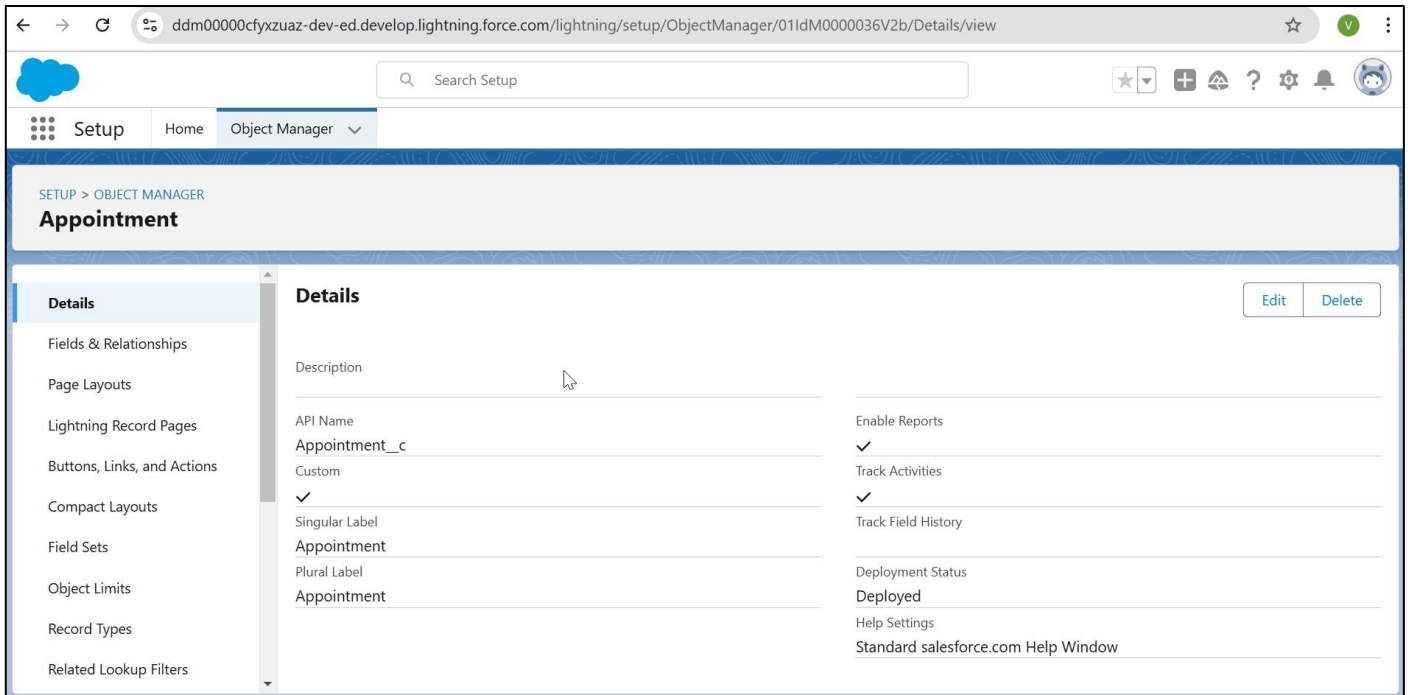


The screenshot shows the Salesforce Object Manager interface for the 'Student' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types,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

- 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](#)

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

## • Appointment object

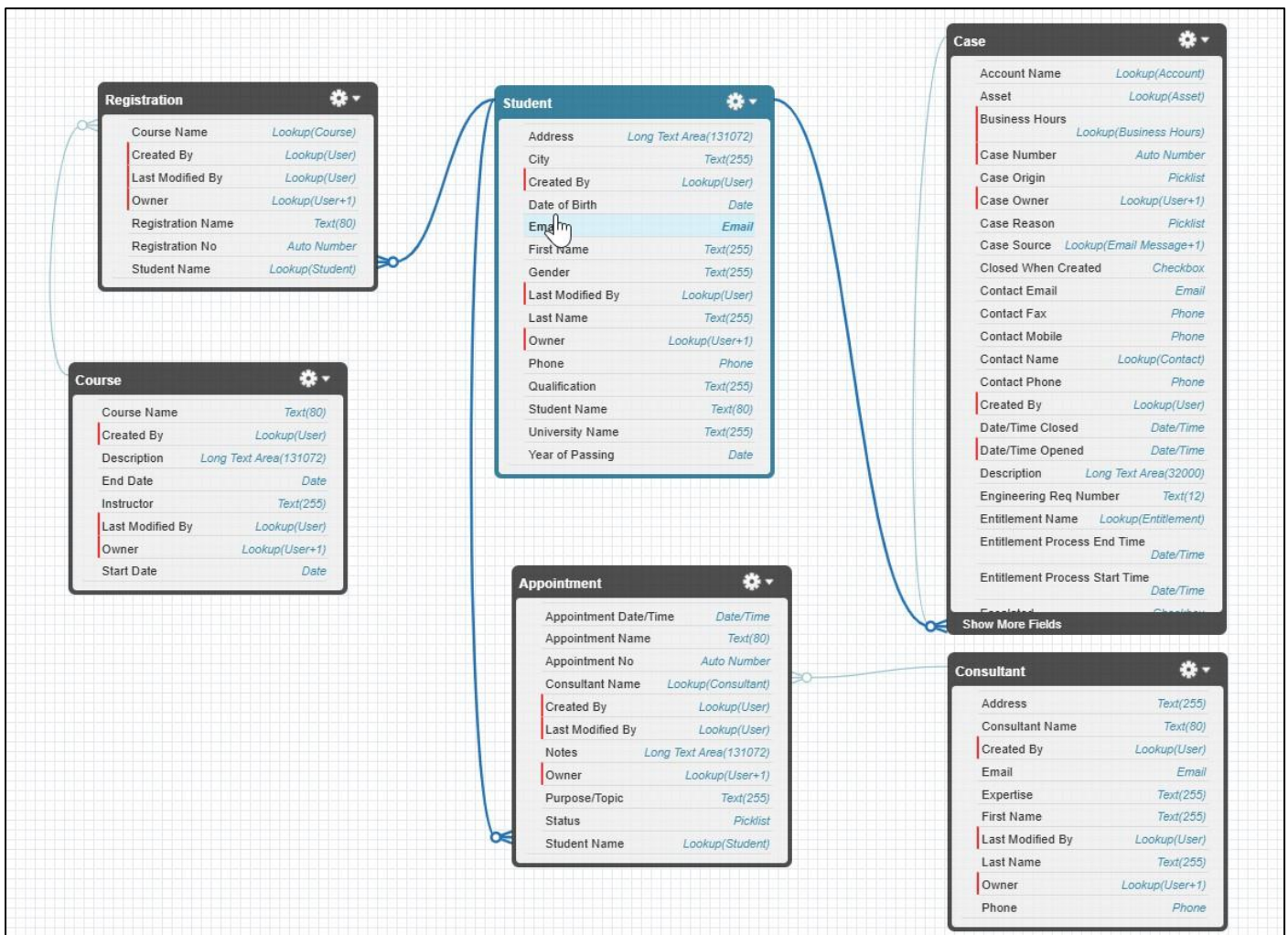


The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types,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

- Description
- 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

ddm0000cfyxuaz-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Status/view

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                    |
|---|-------------|-------------|-------------------------------------|-------------------------------------|----------------------|--------------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | New         | New         | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Assigned dynamically | VETRIVELM, 26/09/2024, 5:07 pm |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Working     | Working     | <input type="checkbox"/>            | <input type="checkbox"/>            | Assigned dynamically | VETRIVELM, 26/09/2024, 5:07 pm |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Escalated   | Escalated   | <input type="checkbox"/>            | <input type="checkbox"/>            | Assigned dynamically | VETRIVELM, 26/09/2024, 5:07 pm |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Closed      | Closed      | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Assigned dynamically | VETRIVELM, 26/09/2024, 5:07 pm |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Open        | Open        | <input type="checkbox"/>            | <input type="checkbox"/>            | Assigned dynamically | VETRIVELM, 07/11/2024, 7:56 pm |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | 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.

ddm0000cfyxuaz-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Type/view

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.

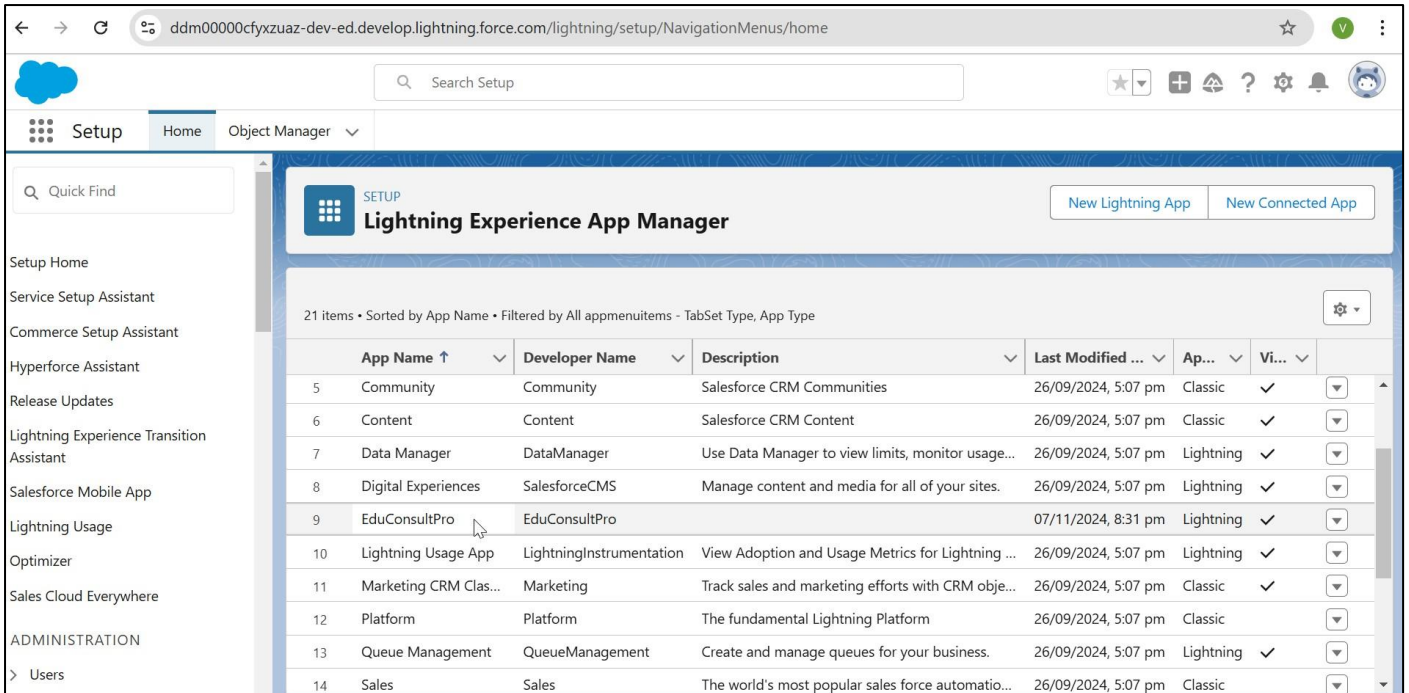
**Case Type Picklist Values** [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Case Type Picklist Values Help](#)

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

**Inactive Values**

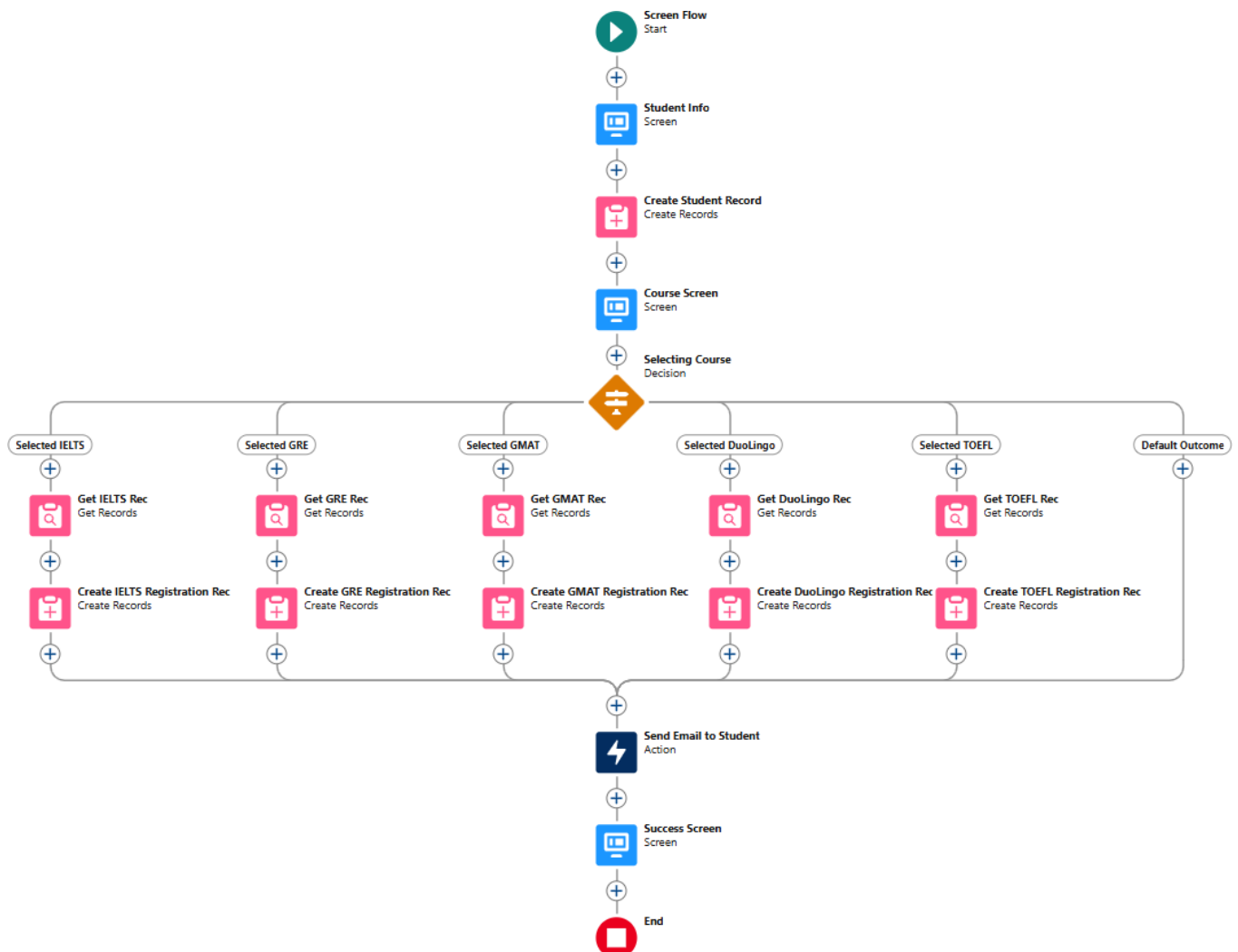
No Inactive Values values defined.

## 4. Create a Lightning App




| 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"/> | <a href="#">Edit</a>   <a href="#">Login</a> | Adanna, Diya              | dadan   | test_diya_pas.4w8bjyb19wik.tszgrgsbkxpx.3gi8ofovzwn.ug539fgvmm1e@salesforce.com |                  | ✓                        | UMS User                         |
| <input type="checkbox"/> | <a href="#">Edit</a>                         | Chatter Expert            | Chatter | chatty.00ddm00000cfyxzuaz.th9rtliveyc4@chatter.salesforce.com                   |                  | ✓                        | Chatter Free User                |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Login</a> | Concepción Morales, María | mconc   | m_c_morales.no.reply.10.07068458291328.bjsbfijwxqlb.rsrlowgbhdyr@salesforce.com | Research Team    | ✓                        | Research Users                   |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Login</a> | Consultant                | cons    | consultant@gmail.com  |                  | ✓                        | Standard Platform User           |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Login</a> | Ellington, Amelia         | aelli   | amelia.ellington.1.46kxcp9oodih.d6cwpdcuo4wh.qnv6esqnxvcz@salesforce.com        |                  | ✓                        | Force.com - Free User            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Login</a> | Figueroa, Jose            | jfigu   | j_figueroa.no.reply.22.69314487405014.upvvogblq6ui.86veknzpz6b0@salesforce.com  | Research Manager | ✓                        | Research Manager                 |
| <input type="checkbox"/> | <a href="#">Edit</a>                         | M. VETRIVEL               | VM      | vetrivel@salesforce.com   | SF Admin         | ✓                        | System Administrator             |
| <input type="checkbox"/> | <a href="#">Edit</a>                         | Oliveira, Leonardo        | mconc   | l_oliveira.no.reply.5.919560845016536.4ctvtijxxup4.vcxqqh5srmla@salesforce.com  | Research Team    | <input type="checkbox"/> | Research Users                   |
| <input type="checkbox"/> | <a href="#">Edit</a>                         | User, Integration         | integ   | integration@00ddm00000cfyxzuaz.com  |                  | ✓                        | Analytics Cloud Integration User |
| <input type="checkbox"/> | <a href="#">Edit</a>                         | User, Security            | sec     | insightssecurity@00ddm00000cfyxzuaz.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

← → ↺

ddm00000cfyxzuaz-dev-ed.develop.lightning.force.com/lightning/o/EmailTemplate/home

☆ V ⋮



EduConsultPro

Home Student Course Consultant Appointment Registration Cases **\* Email Templates**

Email Templates

Recent

5 items

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

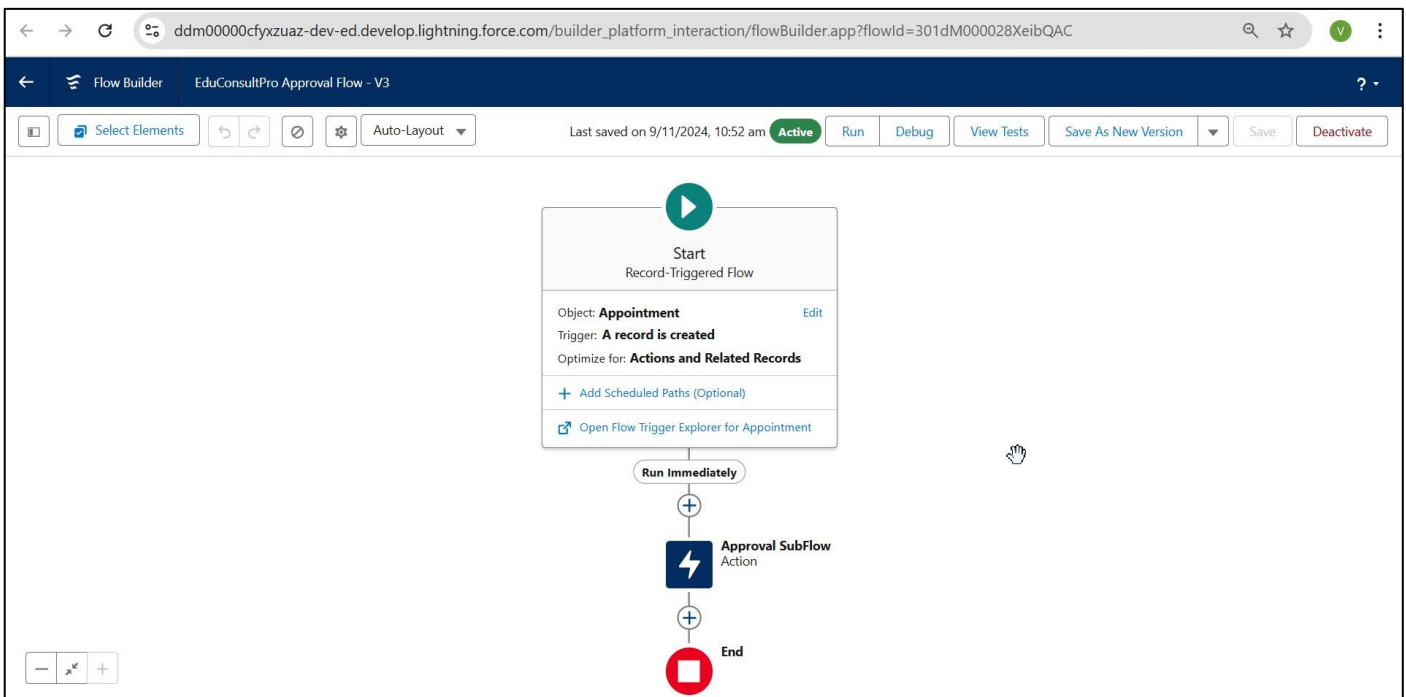
| EMAIL TEMPLATES         | Email Template Name          | Description                                 | Folder                 | Last Modified By | Last Modified Date  |   |
|-------------------------|------------------------------|---|------------------------|------------------|---------------------|---|
| 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

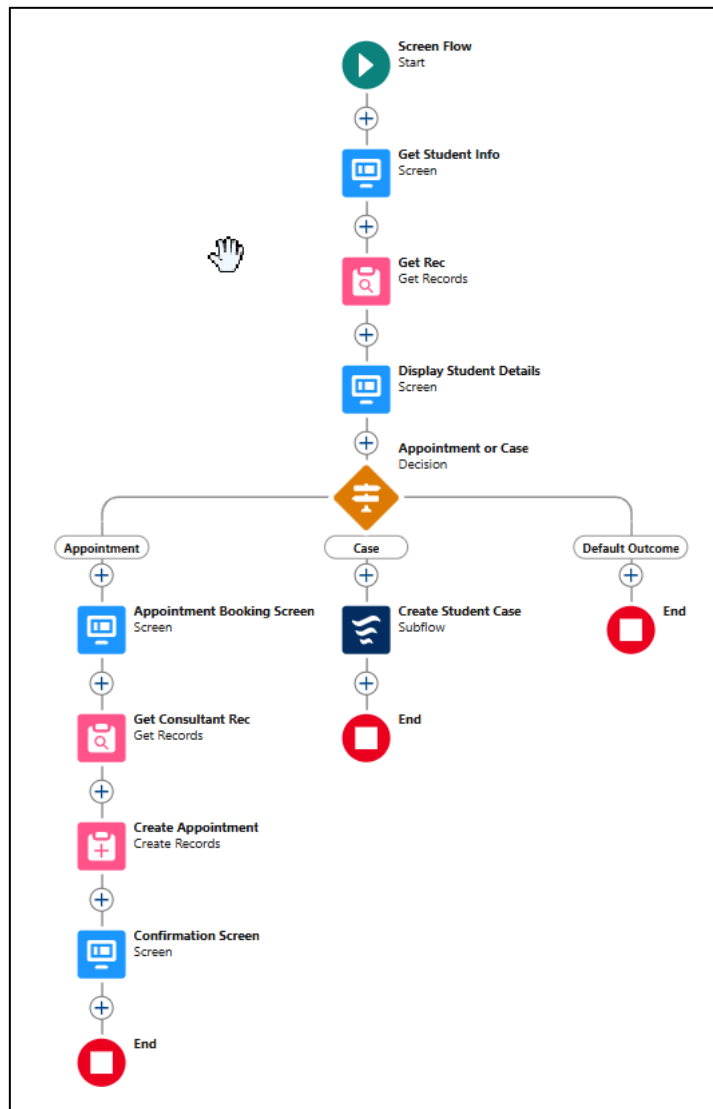
All Folders

Created by Me

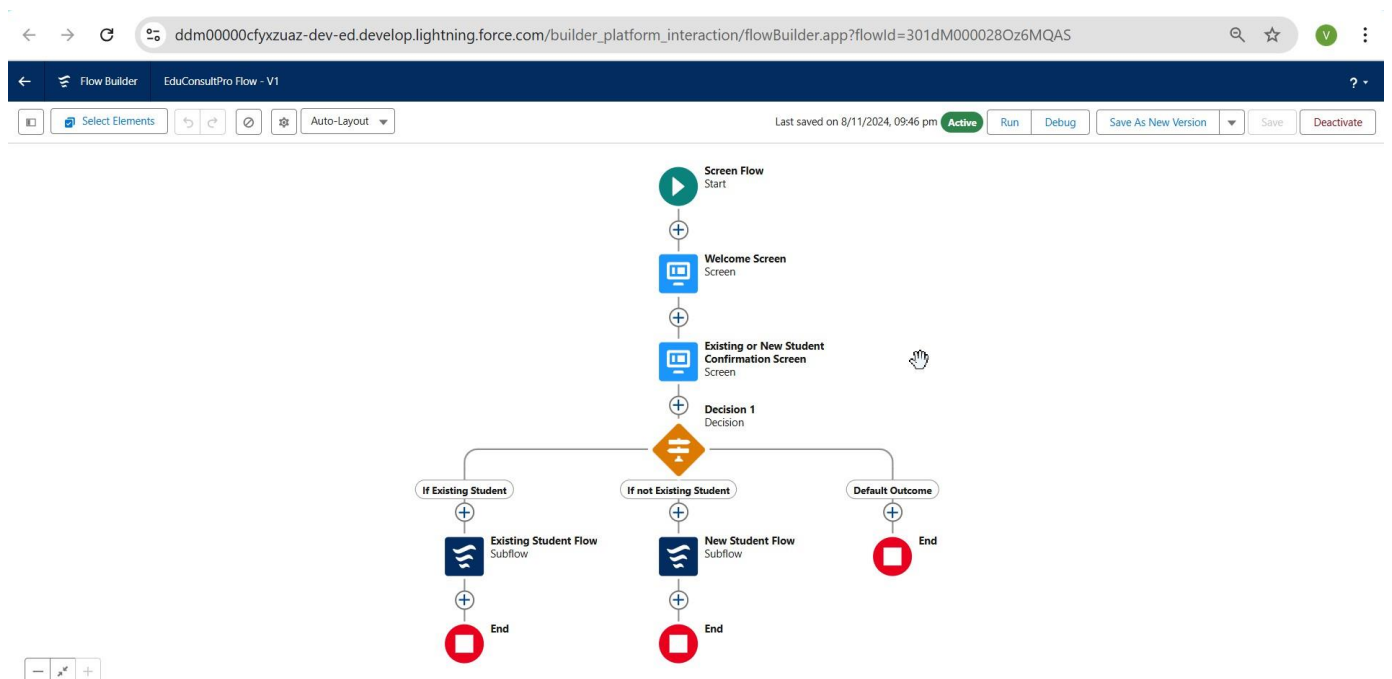
Shared with Me



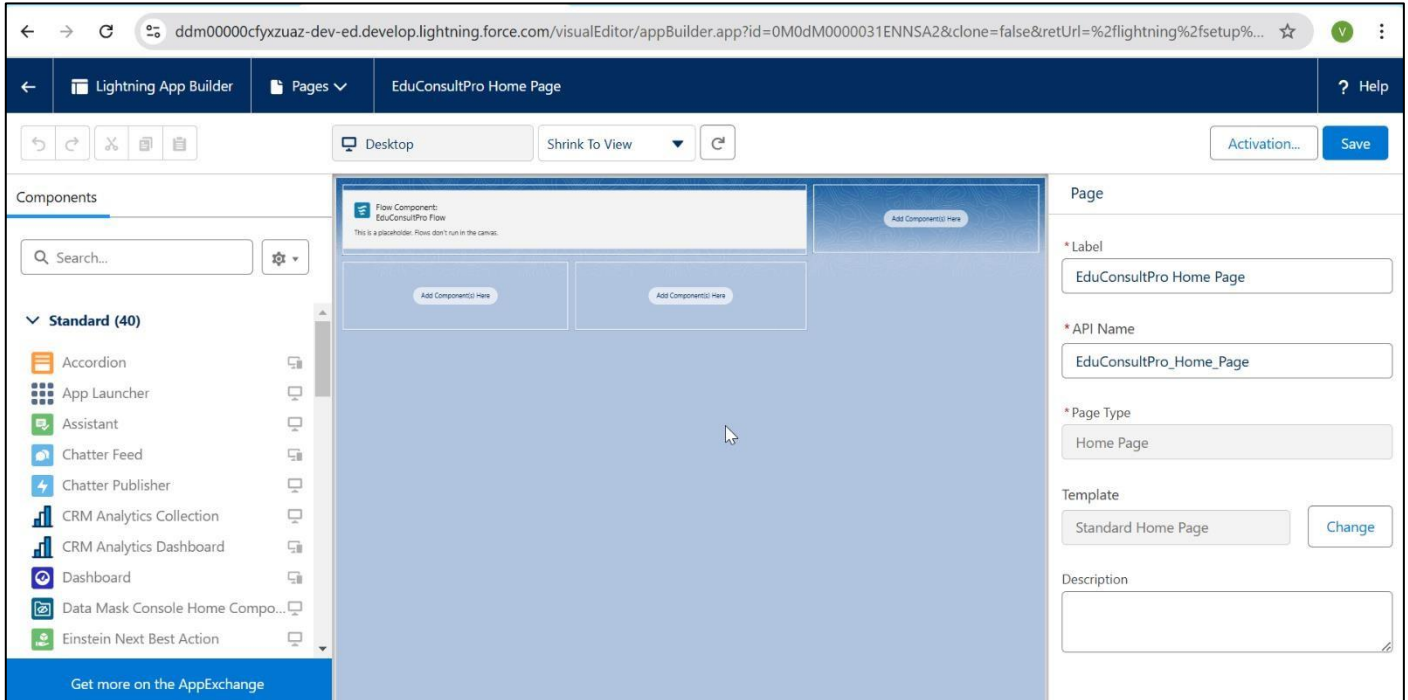
## 9. Create a ScreenFlow for Existing Student to Book an Appointment



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

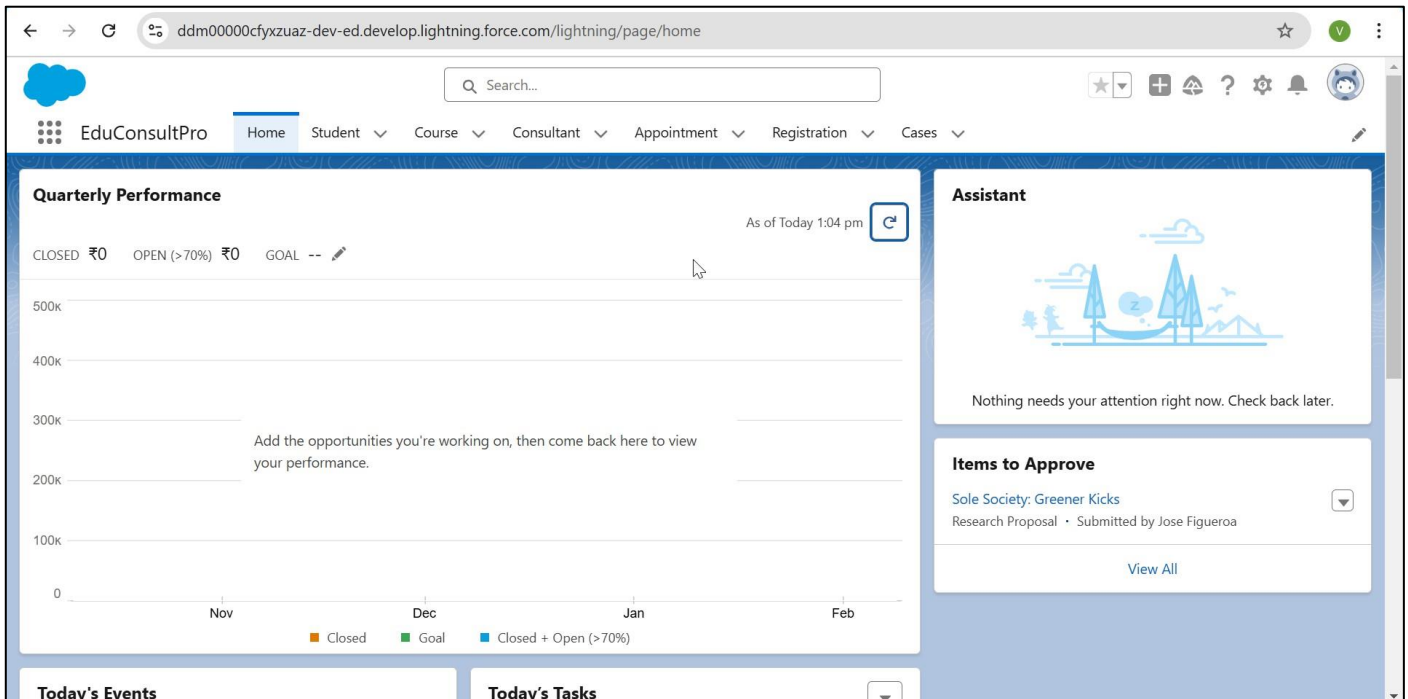


## 11. Create a lightning app page



The screenshot shows the Lightning App Builder interface for creating a page. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'EduConsultPro Home Page'. The main workspace is divided into three sections:

- Components:** A sidebar on the left with a search bar and a list of standard components (40) including Accordion, App Launcher, Assistant, Chatter Feed, Chatter Publisher, CRM Analytics Collection, CRM Analytics Dashboard, Dashboard, Data Mask Console Home Compo..., and Einstein Next Best Action.
- Page:** A panel on the right with fields for Label (EduConsultPro Home Page), API Name (EduConsultPro\_Home\_Page), Page Type (Home Page), Template (Standard Home Page), and Description.
- Canvas:** The central area where components are placed. It shows a placeholder for the 'Flow Component: EduConsultPro Flow' and several 'Add Component(s) Here' buttons.



The screenshot shows the 'EduConsultPro' home page. The top navigation bar includes a search bar and a menu with 'Home', 'Student', 'Course', 'Consultant', 'Appointment', 'Registration', and 'Cases'. The main content area is divided into three sections:

- Quarterly Performance:** A chart showing performance over time (Nov, Dec, Jan, Feb). The chart includes a legend for 'Closed', 'Goal', and 'Closed + Open (>70%)'. The text 'As of Today 1:04 pm' is displayed.
- Assistant:** A section with a tree icon and the text 'Nothing needs your attention right now. Check back later.'
- Items to Approve:** A section showing a list of items to approve, including 'Sole Society: Greener Kicks' and 'Research Proposal' submitted by Jose Figueroa. A 'View All' link is present.

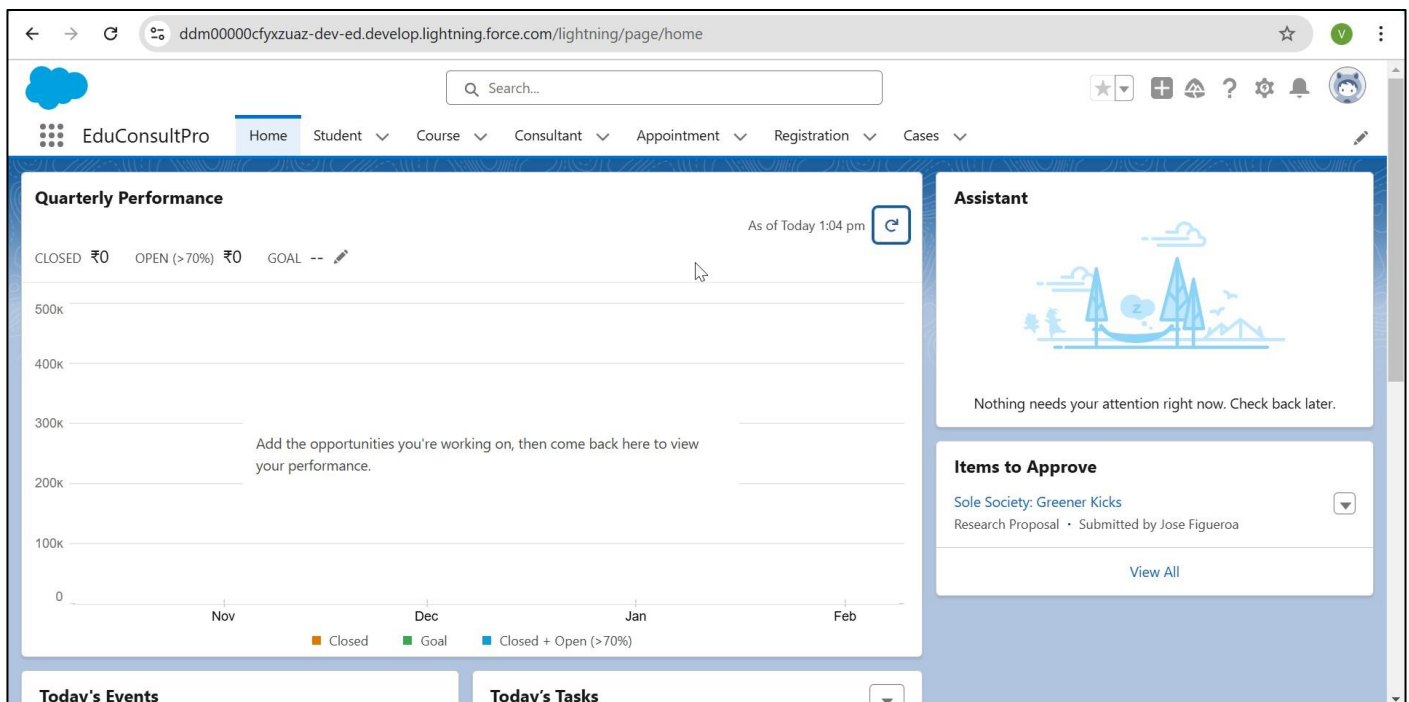
## 5. Testing and Validation

### • 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.

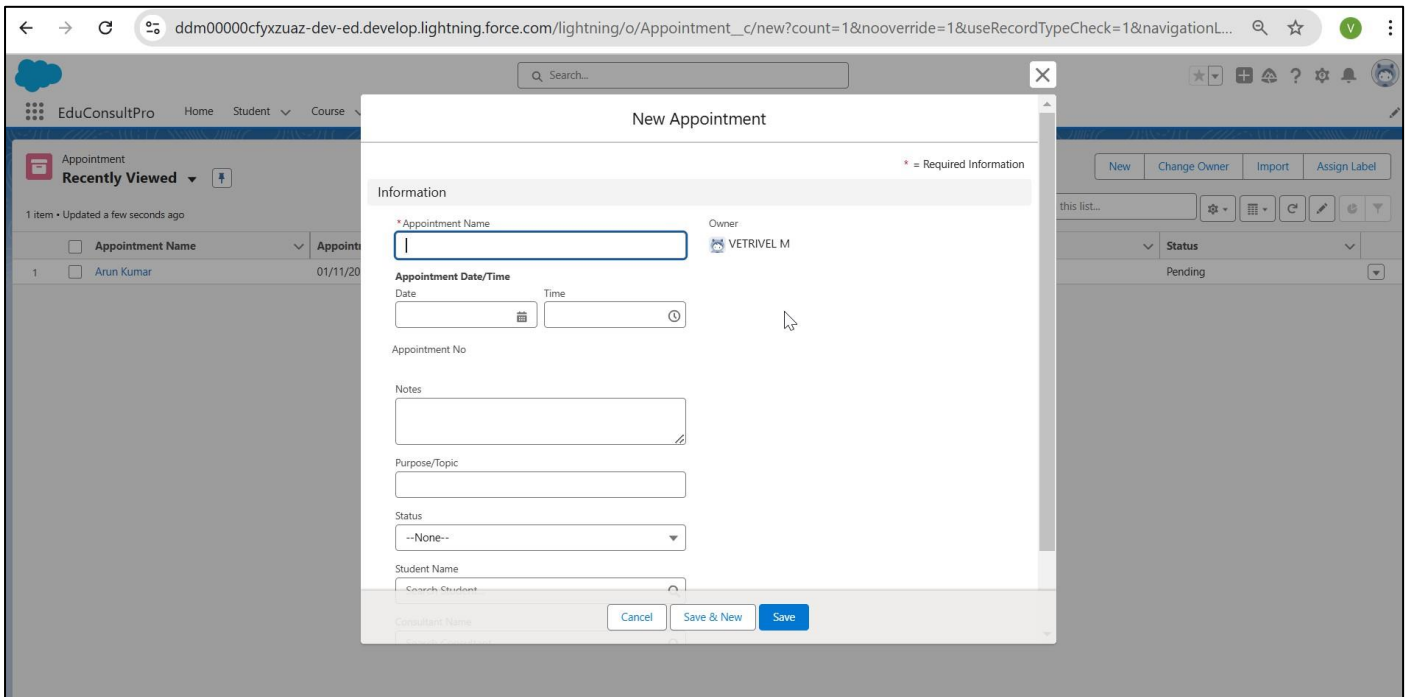
#### ▪ Dashboard and Report Accessibility:

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

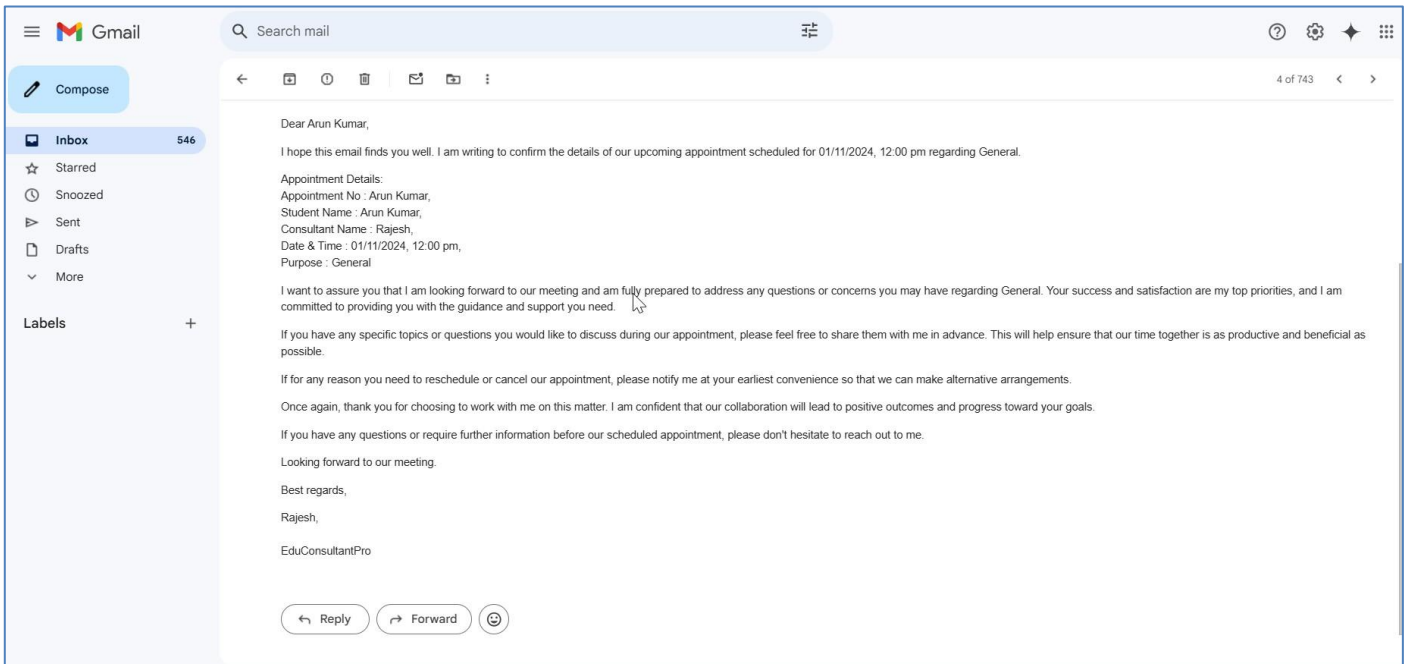


#### ▪ Lightning App Navigation:

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



## • Automated email notifications





## 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.

GitHub Repo link: <https://github.com/m-vetrivel/NM-Project>

Demo Video link: <https://drive.google.com/file/d/1uQjzvK79MiKjt9swxcHy2l-88czpPAoG/view?usp=sharing>