ACRMApplicationtoManagethe Services offered by an Institution

Submitted By

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Abstract

The **EduConsultPro** Institute is one of these leading educational institutes that annually presents a greater quantity of various courses and programs for an increasingquantityofprospectivestudents.Theservicestandardsneedeffective management in admissions management, student inquiries, and expert consultingtokeeptheminahighposition.Thisprojectwillentailthedesignand implementation of a comprehensive CRM application using Salesforce to support this process better and improve the experience of students and admissions staff alike. The solution will consist of features in admission application management, consulting services management, and immigration case management, among others. *Admission Application Management* will enableprospectstomakeapplicationsonlineandfortheadmissionstafftotrace and scrutinize the applications through automated notifications. *Consulting Services Management* will help students create their request for expert advice, whileconsultantscanscheduleandmanagetheirappointmentswithmuchease. The Immigration Case Management will provide information on immigration-related questions and cases. Some features of this system include automated workflows, email notifications, comprehensive dashboards, and collaboration tools. **EduConsultPro** Institute has now revamped pages for their prospective students,whicharesmooth,transparent,andeasilynavigated,allmadepossible through the use of Salesforce CRM. The sole concept, however, is developing operational efficiencies with an increased throughput in the admission process throughconsultingservices.Now,thisprojectalignsnotjustwiththingsupfront but provides a nice platform for scalable and future-fit growth.

INDEXPAGE

Topic	Pageno
1. Title	1
2. Abstract	2
3. Introduction	4
4. CreateObjectsfromSpreadsheet	5
5. CreateaScreenFlowforStudentAdmissionApplicationprocess	8
6. CreateUsers	10
7. CreateanApprovalProcessforPropertyObject	11
8. CreateaRecordTriggeredFlow	13
9. CreateaScreenFlowforExistingStudenttoBookanAppointment	14
10. CreateaScreenFlowtoCombineallttheflowsatoneplace	16
11. Createalightningapppage	18
12. ExecutionScreenshots	19

INTRODUCTION

EduConsultPro Institute, a prestigious educational establishment, is committed to improving the management of its admission processes, consulting services, and immigration case handling. As the institute experiencesa risein student applicationsandservice requests,it recognizes the need for a more efficient and integrated solution to address these challenges.

Toenhanceoperationalefficiencyandprovideaseamlessexperienceforboth prospectivestudentsandadmissionsstaff,EduConsultProInstituteisturning toSalesforceCRM.Thisinitiativewillstreamlinevariousprocesses,including thehandlingofadmissionapplications,consultingrequests,andimmigration cases, all within a single, cohesive CRM platform.

Theprojectwillinvolve:

- **Developing a user-friendly admission application system** that allows prospective students to apply online, with automated notifications and detailed reporting for admissions staff.
- **Creating an efficient approval workflow** for consulting requests, including automated email alerts and a streamlined submission process.
- **Managing consulting services** by enabling students to request consultations, schedule appointments, and track service statuses within Salesforce.
- **Handling immigration cases** by allowing students to initiate cases through multiple channels, manage documents, and track case progress with integrated tools.

Include the likes of setup of Salesforce objects, development of custom flows,designingforunifiedapppages,andmorein lightning.Thesechanges should be targeted at bringing a clearer and more smooth experience for the concerned users who are going through the processes of admission and consultation.

Task1

CreateObjectsfromSpreadsheet

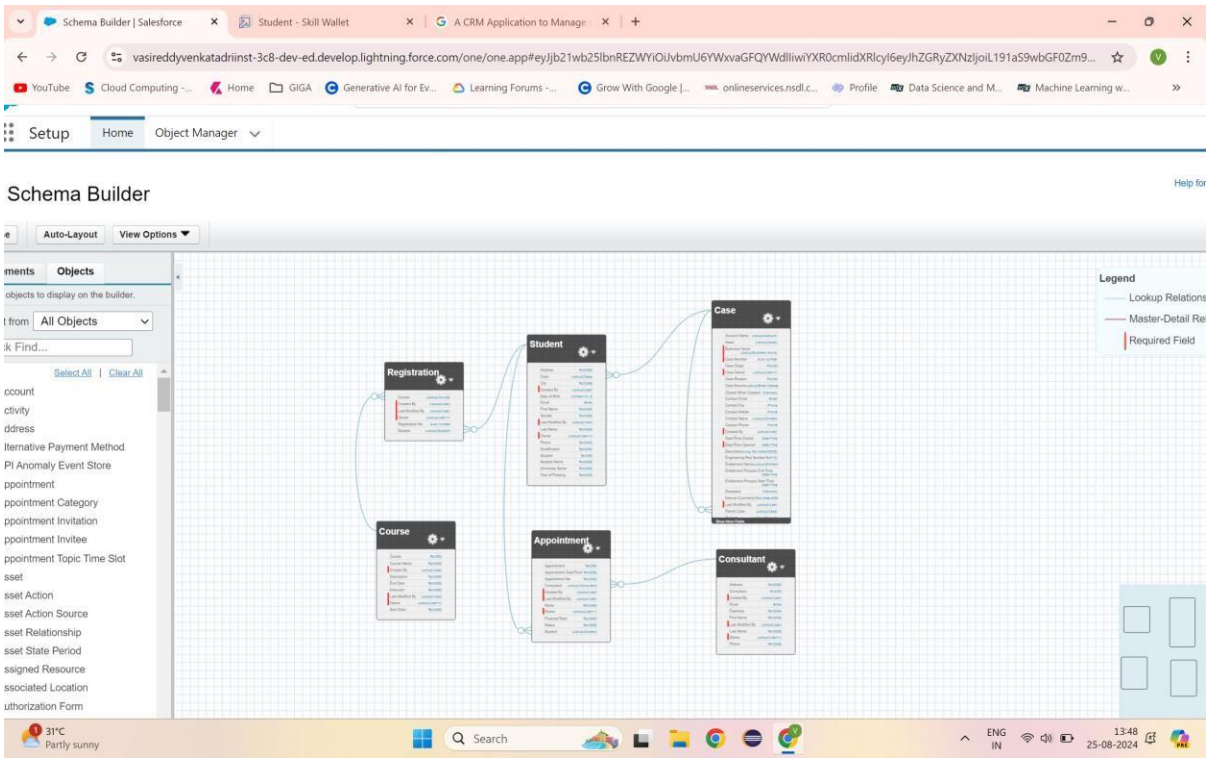
The outcome is enhanced services management at EduConsultPro Institute for whichSalesforcefunctionalityisleveragedtoenablecreationofobjectsdirectly from the spreadsheets. This will make it easier to integrate existing data in Salesforce and effectively manage the same for several institutional requirements.

Manyobjectsweredoneusingthespreadsheetsgivenbytheinstitutiontosolve the assignment. Course, Consultant, and Student, and Appointment are the objects designed, one representing a critical working of an institution. The lookup relationships between the said objects will ensure the design integrity andsmoothnavigationofdata.Atthispoint,lookuprelationshipswerecreated between Appointment and Student and Appointment and Consultant.

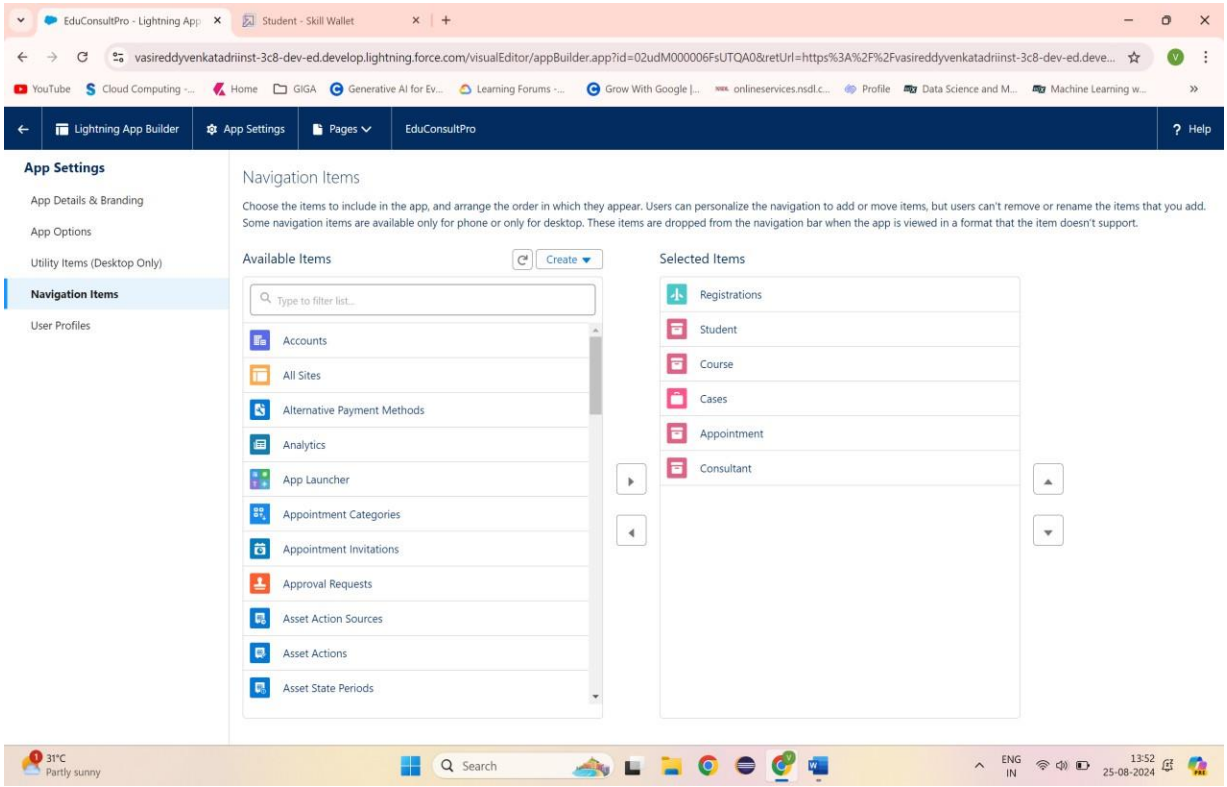
A new Registration object was created to hold student and course information and set up the lookup relationship on either an immigration or visa application regarding student queries between Student and Case.

Itwassetuptomodelthedataregardingtherequirementoftheinstitution.For everynewobject,afterthat,tabswerecreatedthatwouldactaseasyaccesses. TheCaseobjectfurthercustomizedSpecifiedvaluesenteredforthe"Type"filed were Immigration and Visa Application those for "Status" were Open and In-progress. A new Lightning application, EduConsultPro, was developed that aggregatesalltheseelements:home, students,courses,advisers,appointments, registrations,andcases.Theinterfacewaslargelyoptimizedforuserexperience between the system administrator and staff members, so it guaranteed proficient, effective, and transparent administration of all aspects of service within the Salesforce instance at the EduConsultPro Institute.

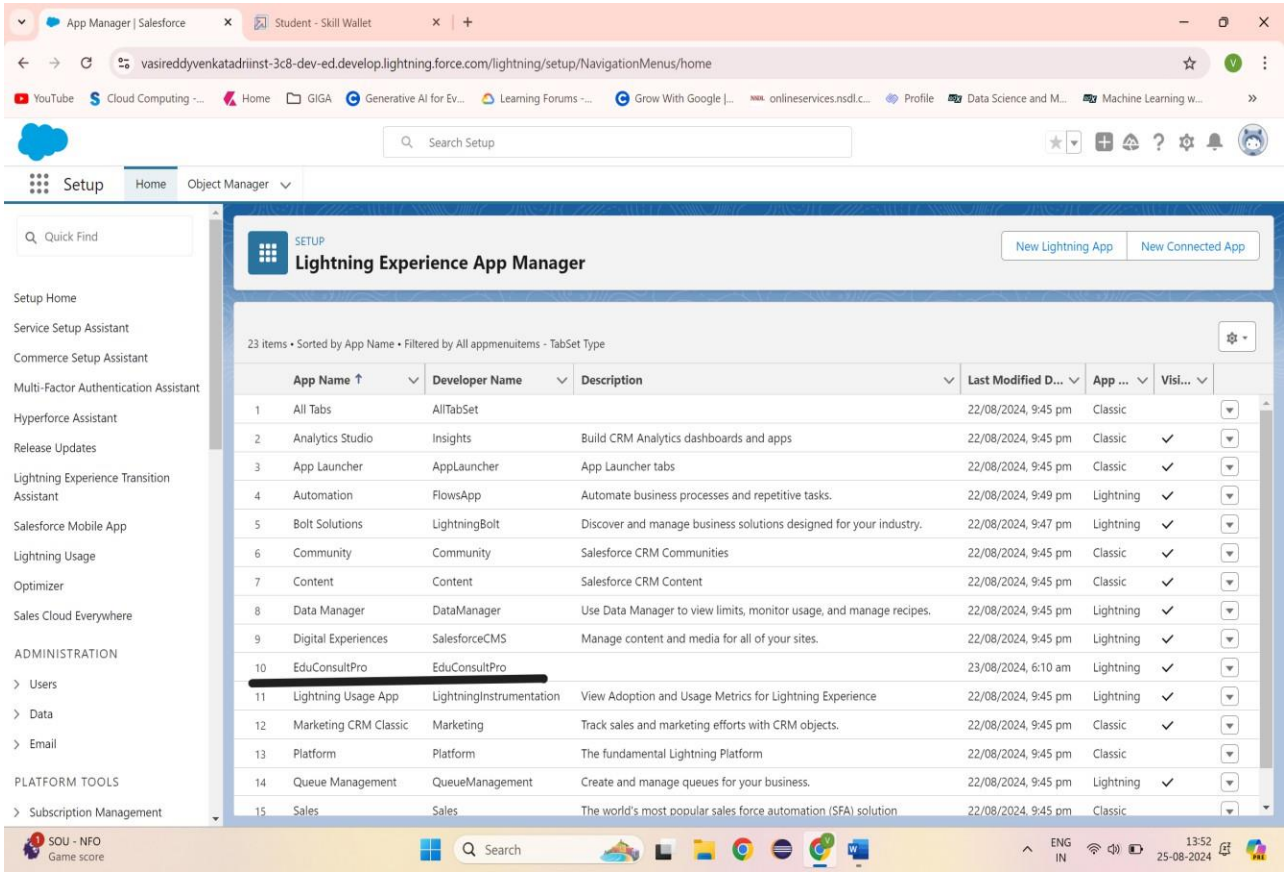
Screenshots:



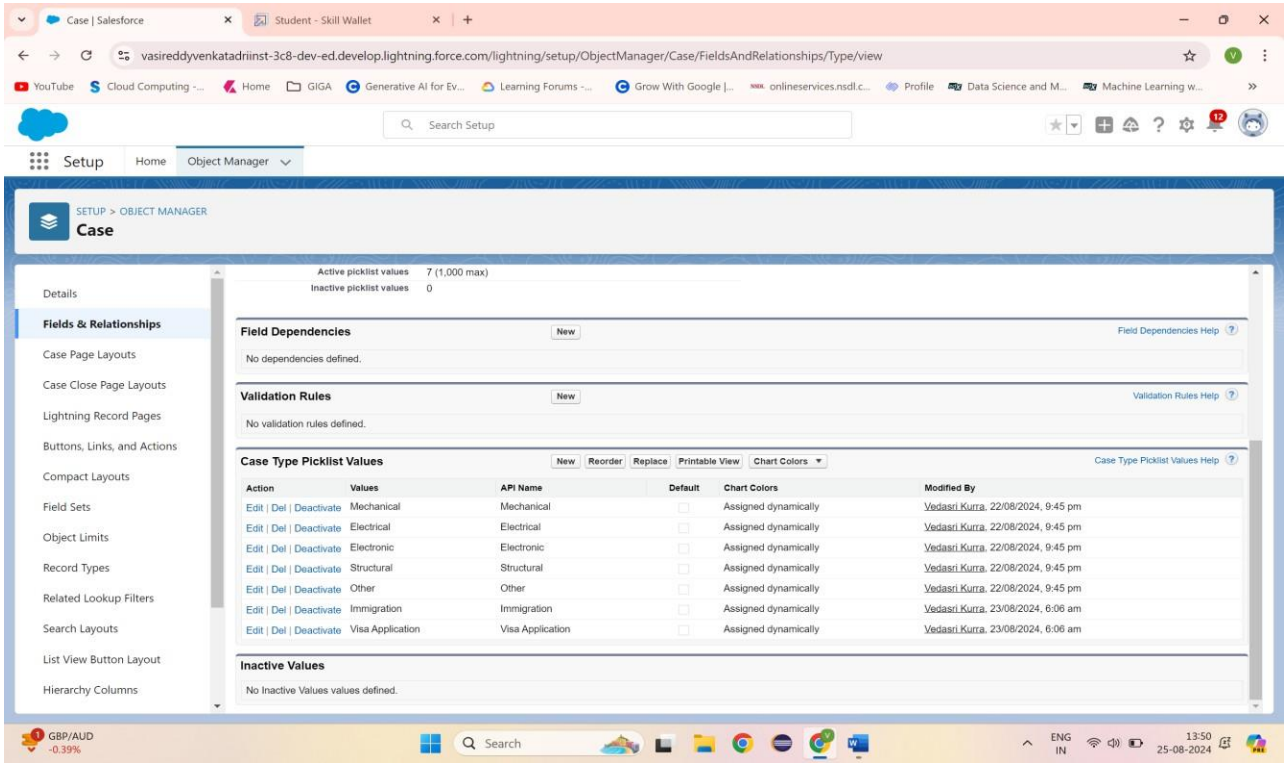
LookuprelationshipamongObjects



AddingitemstoEduConsultPro



EduConsultProLightningApp



ConfiguringtheCaseObject

Task2

CreateaScreenFlowforStudentAdmission Application process

TheEduConsultProStudentFlowsimplifiestheregistrationprocessforstudents by creating a more user-friendly application. I added the Screen element, represented as a "**Student Info**," which was there to carry all the information that pertained to the student. Therefore, I created a record variable known as **StudentRecordRes**toviewthefieldsfromthestudentobjectandpresentavery light experience when getting data.

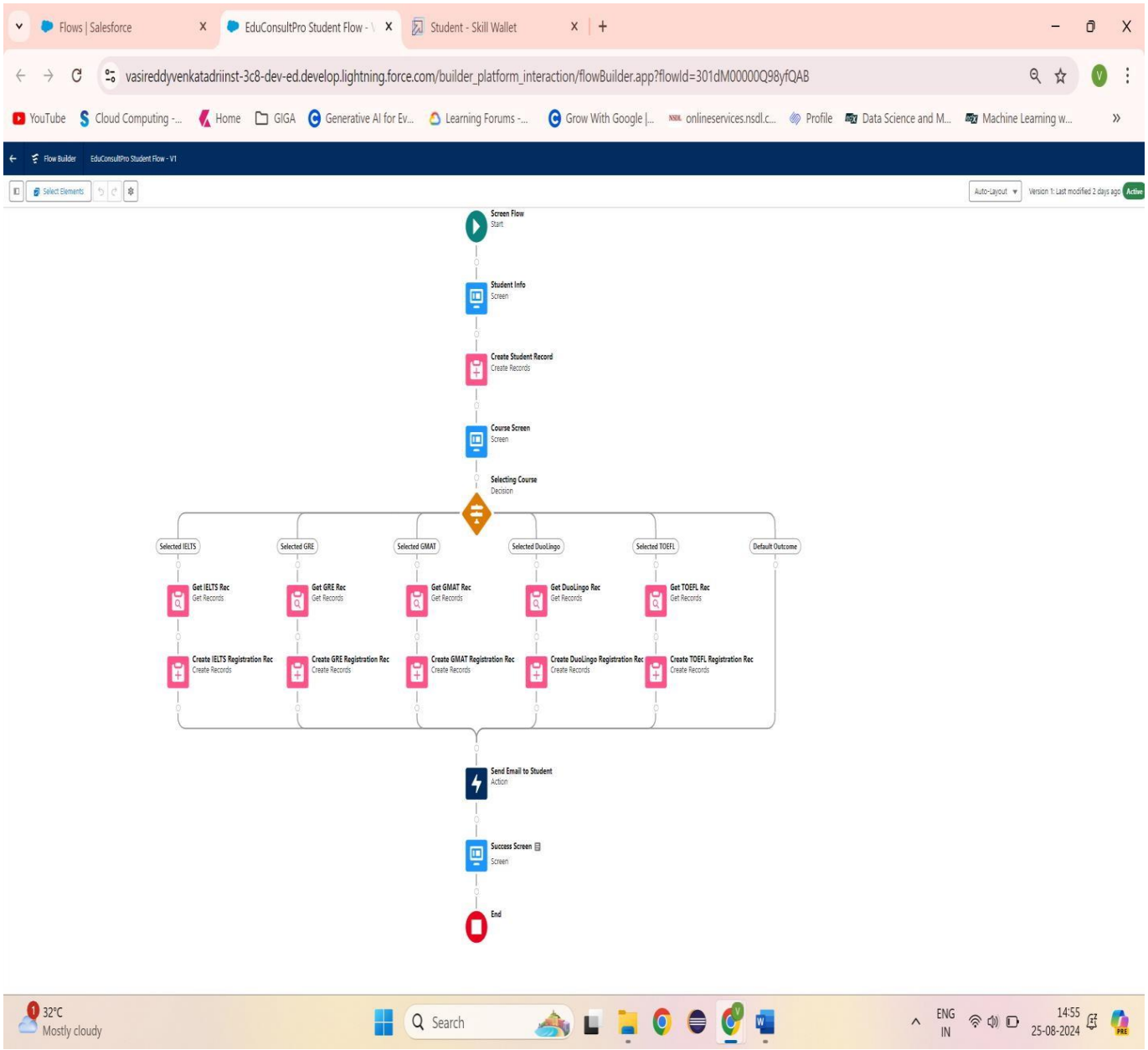
Next, I developed a Create element named "**Create Student Record**" to enable saving the student record input to the Salesforce database. Then I included a "**Course Screen**" by including a second Screen element. The primary choice foundinthescreenis apicklistnamed"**SelectCourse**".Thecourseoptionsthat may be selected are *IELTS, GRE, GMAT, Duolingo, and TOEFL.*

Added a Decision element known as "**Selecting Course**" to manage course selection. This checks the course selected and then directs the flow of action regardingtheselection.Basedontheselectionmade,undertheconditionofthe choice, a Get Recordelement gets the relatedcourse recordfromthe "**Course**" object so that registration is done correctly.

Aftercollectingthecoursedatathatwasneeded,aCreateRecordselementwas leveragedtomakearegistrationrecordinthe"**Registration**"object,associating theselectedcoursewithalltheinformationthatstudentgavetome.Ithenmade Text Template Resources for the body and subject of the email to add the message that would be sent to the student ensuring that they had properly registered and sought to join the platform.

I then added an Action element titled "**Send Email to Student**" for sending this email—including the capability to fill in the email with provided student details any time the process is run. To exit the process system, I added an Screen element titled "**Success Screen**" and then added a message, "Registration has been completedsuccessfully," withadvice to students to check their emails for details. This flow will be named hence: "**EduConsultPro Student Flow**."

Screenshot:



EduConsultProStudentFlow

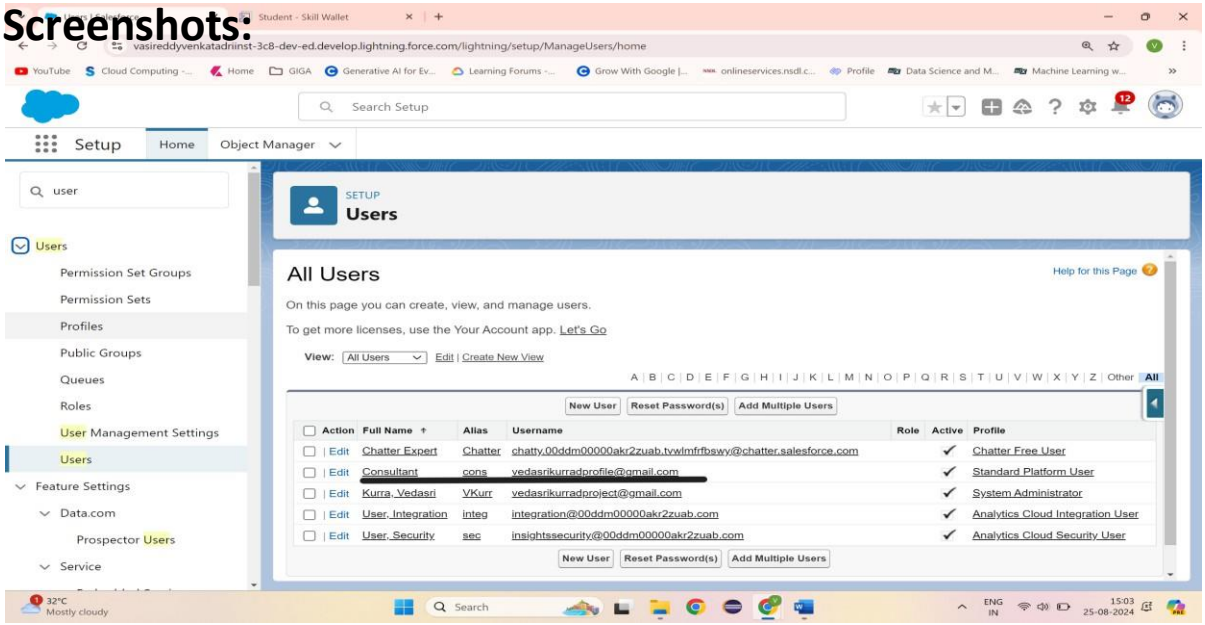
Task3

CreateUsers

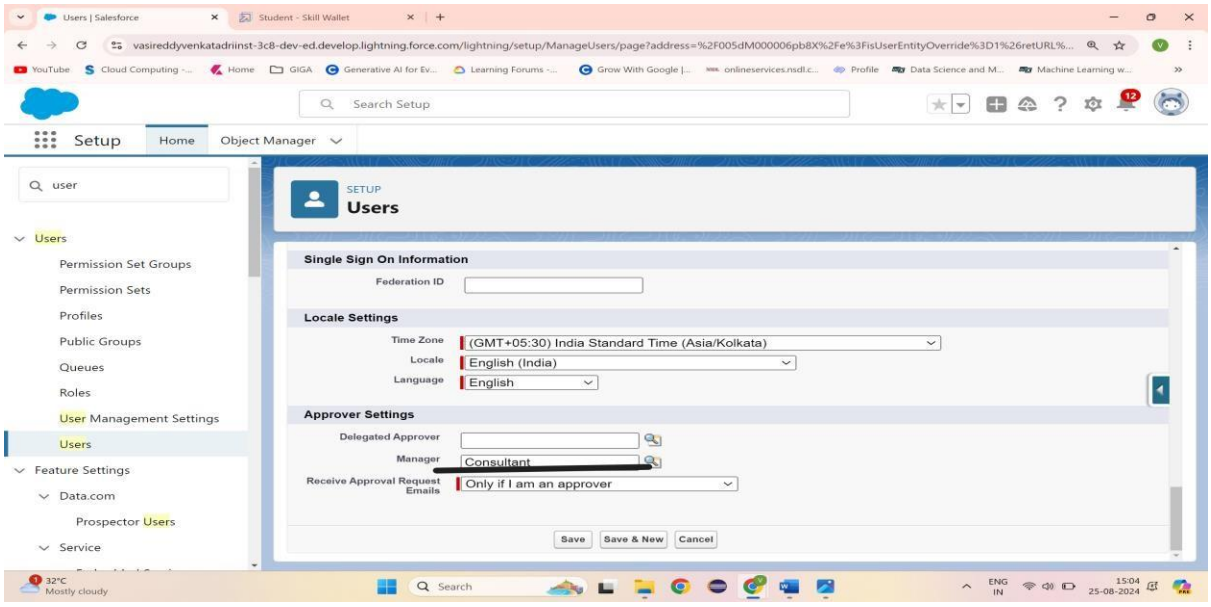
Created new user in Salesforce by navigating to Setup→Administrative→ Users→New User. Entered "Consultant" for the second name and entered "SalesforcePlatform"asthelicensetype.Iappliedtheprofile"StandardPlatform User,"checkedallrequiredfieldsfordata,andsavedtherecordofthenewuser.

Configuredusersettings:BrowsetoSetup→Administration→Users→Editthe user profile Scrolled down to the Approver Settings section, Selected "Consultant" in the Manager Field, At the bottom of the screen, click Save.

Screenshots:



User



ConfiguretheUserSettings

Task4

CreateanApprovalProcessforProperty Object

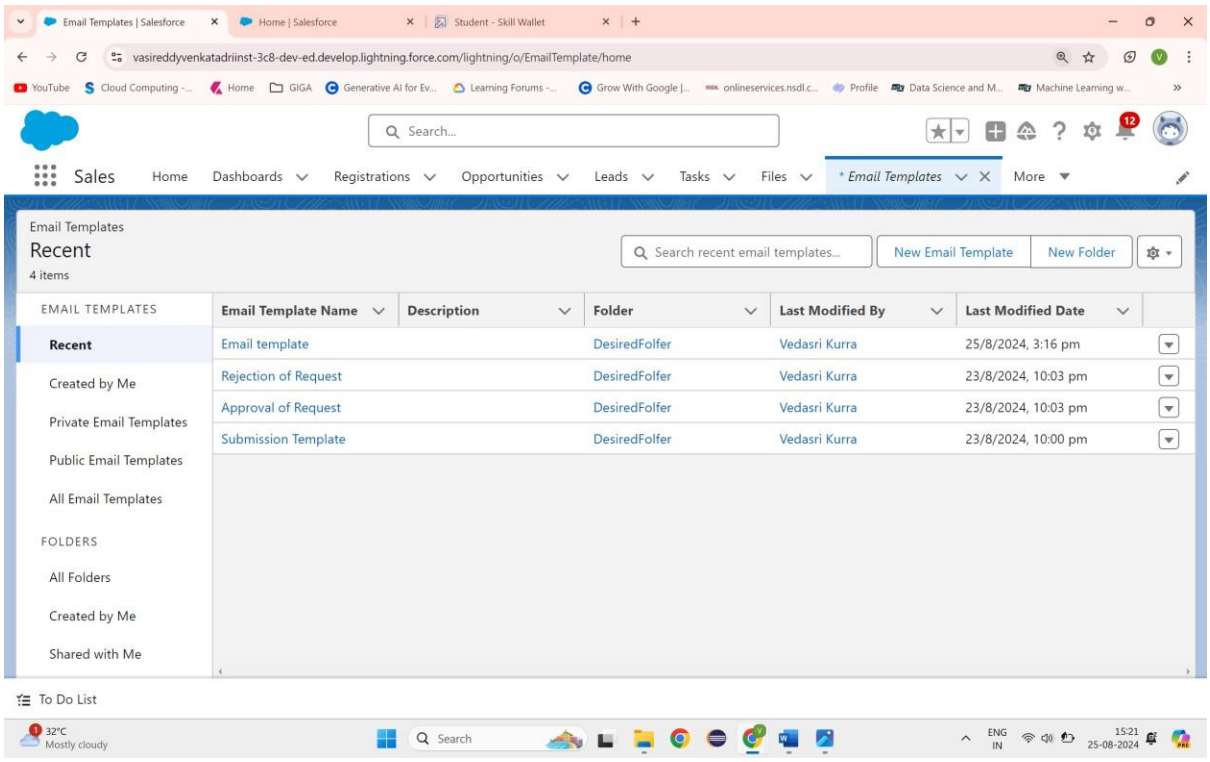
Created email template in Salesforce. From Setup, I input "Templates" in the QuickFindboxandclickedon"LightningEmailTemplates",andclickedthetoggle to on. Opened the App Launcher, searched for "Email Templates" from the searchbox,andsaved.Createdanewfolderwiththedesiredname.Createdan newemailTemplateandselectedthenewcreatedfolder.Thespecifiedtextgot pasted into the HTML Value to create this, in my case, "Submission Template"Designed two more email templates for approving and rejecting requests, ditto the first one.

Earlier, I did set up the approval process. I went to Setup and typed "Approval" intheQuickFindbox,andclickedon"ApprovalProcesses."Iselectedtomanage approval processes for "Appointment" and clicked "Create New Approval Process" using the Jump Start Wizard. I named the process "Appointment Approval" and under the approver settings, I used the setting "Option Automaticallyassignanapproverusingastandardorcustomhierarchyfield"of "Manager." I set the "Next Automated Approver Determined By" field to "Manager."

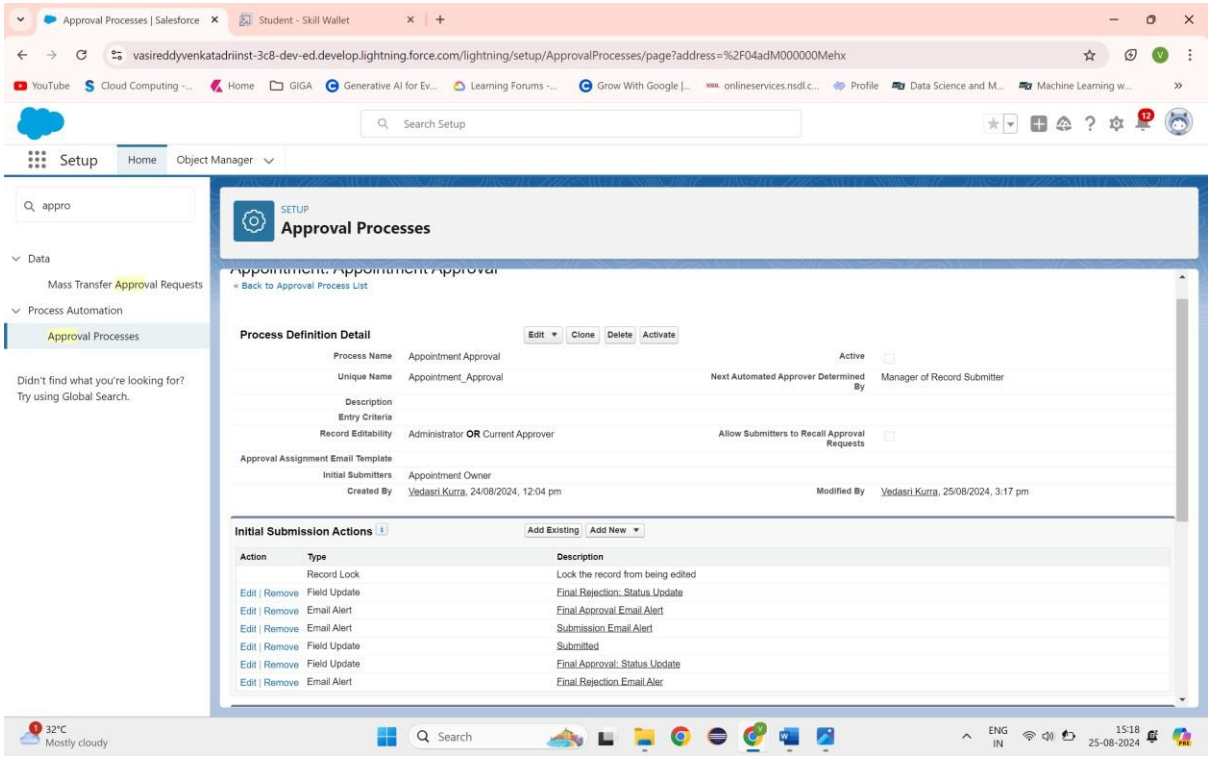
Made the following changes to the Record Editability Properties: Prepended "AdministratorORthecurrentlyassignedapprover"tothelistSavedtheprocess andcheckedouttheformMadeanewFieldUpdateundertheInitialSubmission ActionswithName"Submitted"andconfigureditomaketheupdatetothefield "Appointment: Status" with "Pending"

AlsocreatedanewEmailAlerttype"SubmissionEmailAlert,"auto-populatethe UniqueName,selectedthe"SubmissionTemplate"EmailTemplate,selectedthe recipienttypetotheuser'sName.RepeatedthatfortheFinalApprovalandFinal Rejection actions and set those two up the same way.

Screenshots:



Email Template



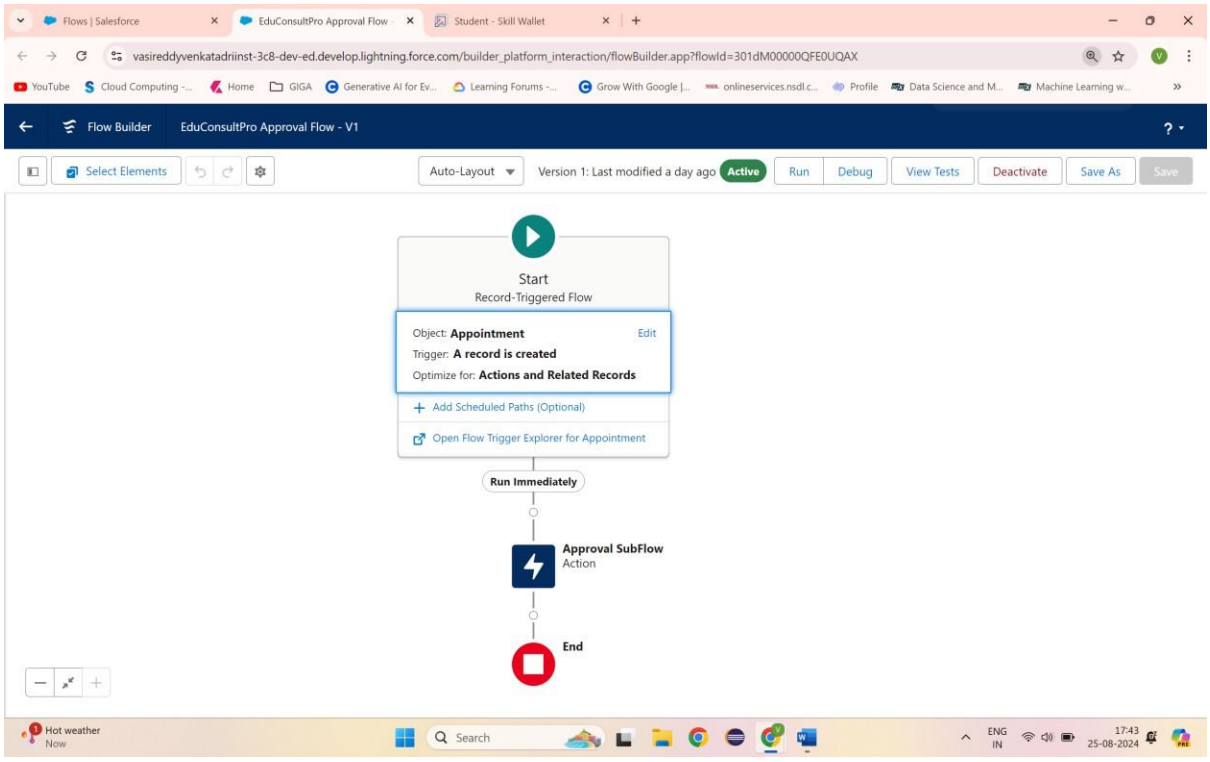
ApprovalProcess

Task5

CreateaRecordTriggeredFlow

Createdarecord-triggeredflowinSalesforceforappointmentapprovals.Setthe flow triggerto 'Whenarecordis created' onanappointmentrecordandadded an action element that would submit the record for approval. Label this Action element as "Approval SubFlow" and set RecordId to "{!$Record.Id}". At this point, the flow was saved with the label "EduConsultPro Approval Flow" and activated.

Screenshot:



EduConsultProApprovalFlow

Task6

CreateaScreenFlowforExistingStudentto Book an Appointment

Configuredanend-to-endflowinSalesforceforstudentappointmentsandcases management.

AddedaScreenelementcalled"GetStudentInfo"tocollectthestudent'sname and email, and added a GET Record element to retrieve student details depending on the name and email collected.

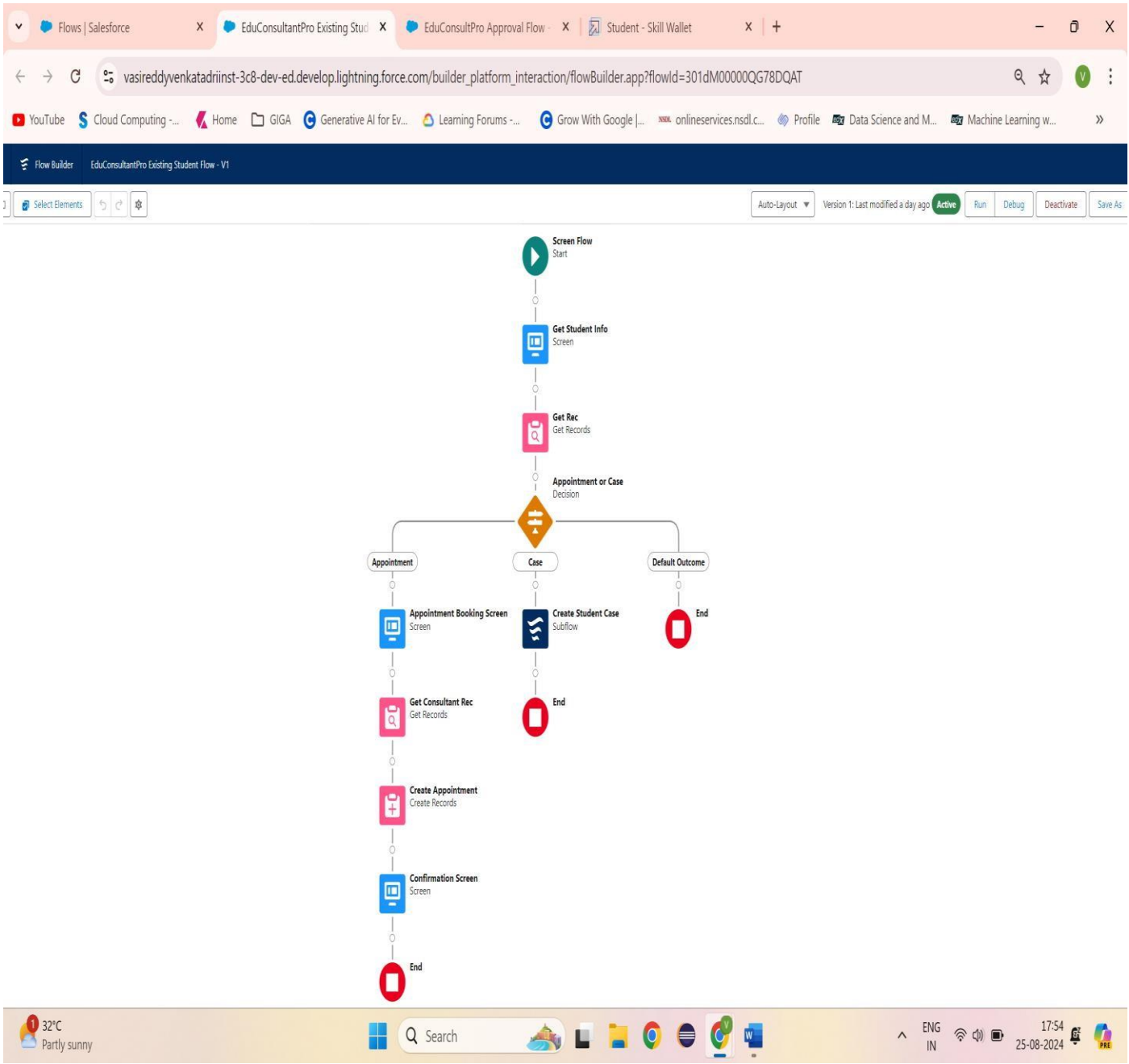
Added a Decision element to route between "Appointment" and "Case" depending upon the student's wishes. Added a Screen element labeled "Appointment Booking Screen" to gather details for appointments in case an appointment has been booked.

Inserted a GET Record element to obtain consultant details based on the selected name of the consultant. Applied a Create Records element to create a new appointment record with appropriate details.

AddedaScreenelementandnamedit"ConfirmationScreen"toletthestudent see details of the appointment confirmation.

Added a Subflow element for case management and named it "Create Student Case"forcreationofacase.Finally,savetheflowas"EduConsultantProExisting Student Flow" and prepare for deployment.

Screenshot:



EduConsultantProExistingStudentFlow

CreateaScreenFlowtoCombineallthe flowsatoneplace

A new Screen Element in the flow was added labelled as "Welcome Screen". Inside this screen, a Display Text component was added and was labelled as "SuccessMessage."

EnteredthegiventextintotheResourcePickerboxsothatthewelcomemessage by EduConsultantPro describes the services and support it provided.Added anotherScreenElementfollowingtheWelcomeScreen,labeled"ExistingorNew Student Confirmation Screen."

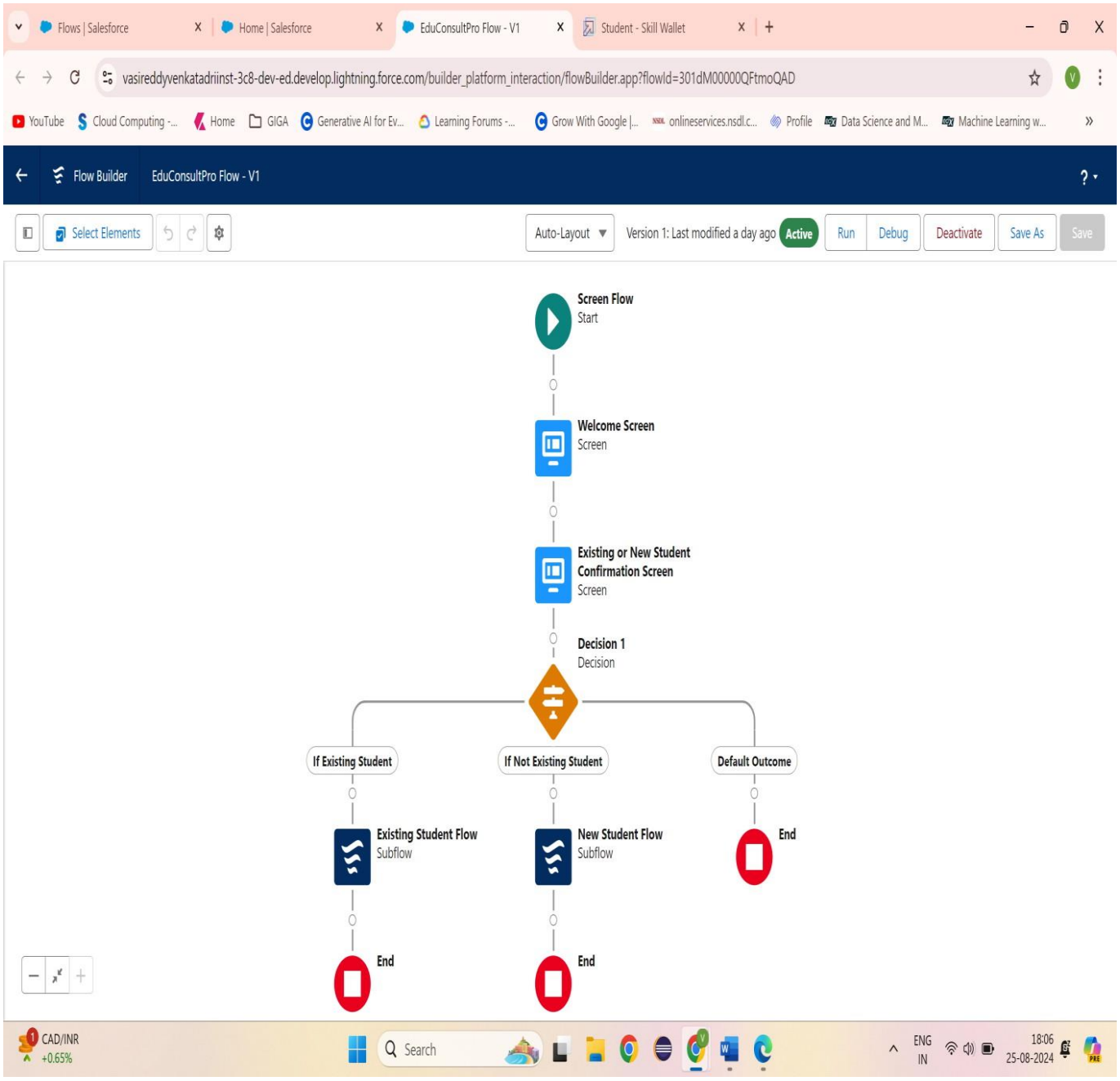
AddedaRadioButtoncomponentwiththelabel"AreyouanExistingStudent?" Created two choices: "Yes" and "No."Then added an Action Element of type Decision and named it "Decision 1," placing it next to the Existing or New StudentConfirmationScreen.Setupthedecisioncriteriawiththeoutcome labeled "If Existing Student." The condition will be when the resource {!Are_you_a_Existing_Student}isequaltothevalue{!Yes}.Addedthesecond outcome for "No.".

Inserted a Subflow Element in the "If Existing Student" path and selected "EduConsultantPro Existing Student Flow" and labelled it as "Existing Student Flow." Saved the flow under the name "EduConsultantPro Existing Student Flow."

Inserted another Subflow Element in the "If Not an Existing Student" path, selecting the "EduConsultantPro Student Flow" and labeling it "New Student Flow."Savedthisflowwiththename"EduConsultProFlow."

Finalizedbysavingtheentireflow,namingit"EduConsultProFlow.”

Screenshot:

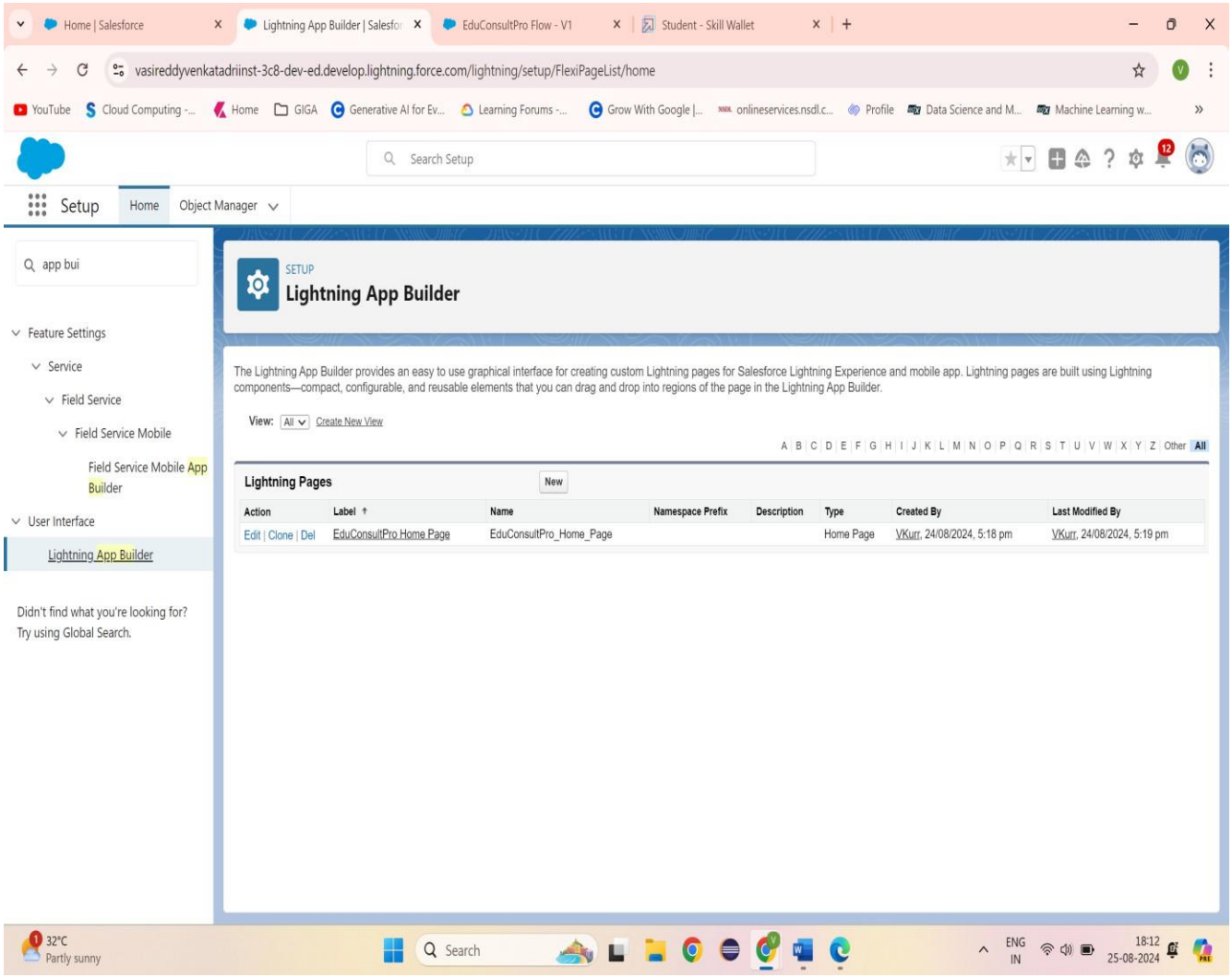


EduConsultProFlow

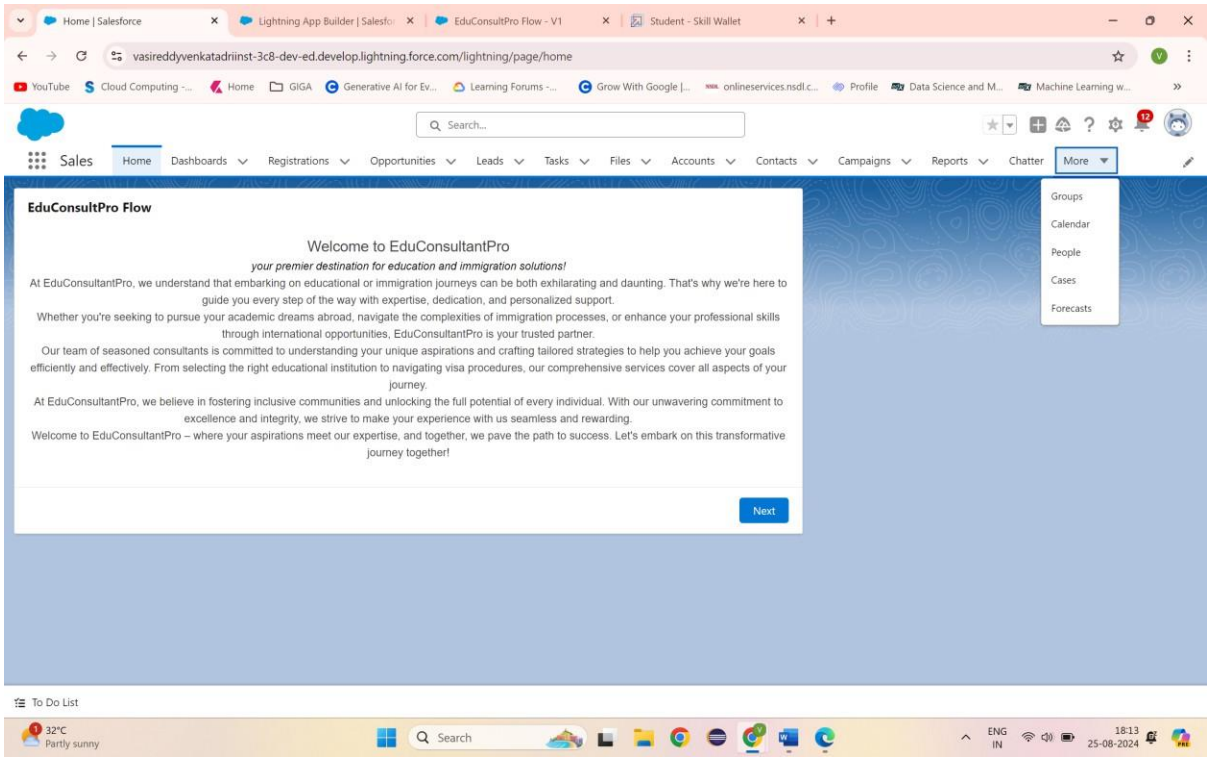
Createalightningapppage

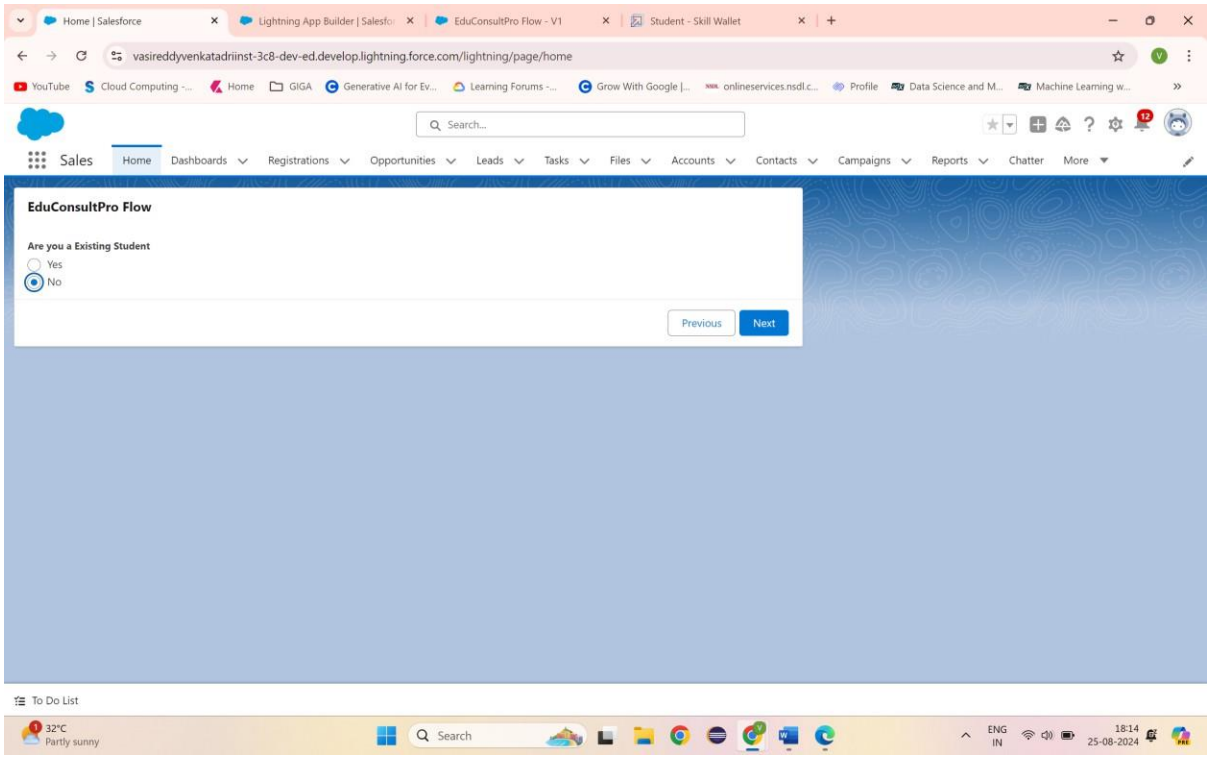
Created and configured a Lightning App Page named "EduConsultPro Home Page" using the Standard Home Page template. Placed the Flow component in the top-right region and incorporated the "EduConsultantPro Flow." Activated the page and assigned it to the Sales app and the System Administrator profile, ensuring it was available for the designated users.

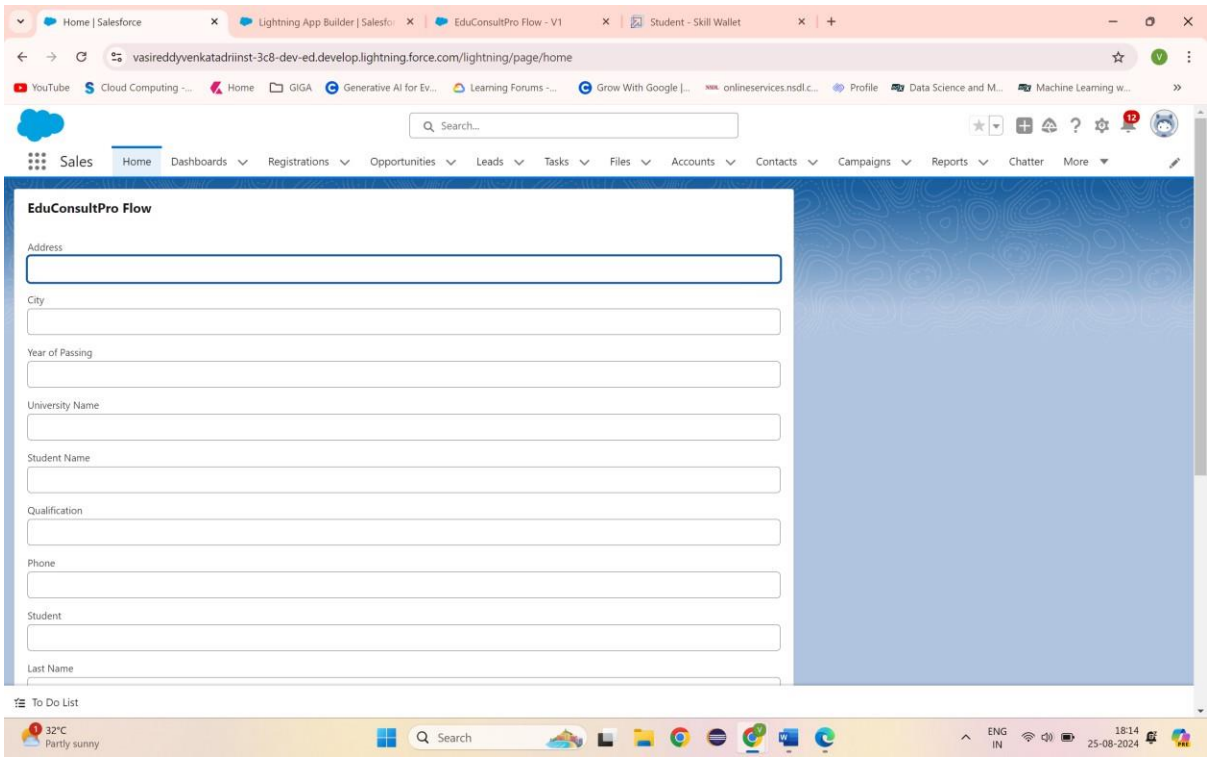
Screenshots:



ExecutionScreenshots:



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Student - Skill Wallet
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EduConsultPro Flow
Address
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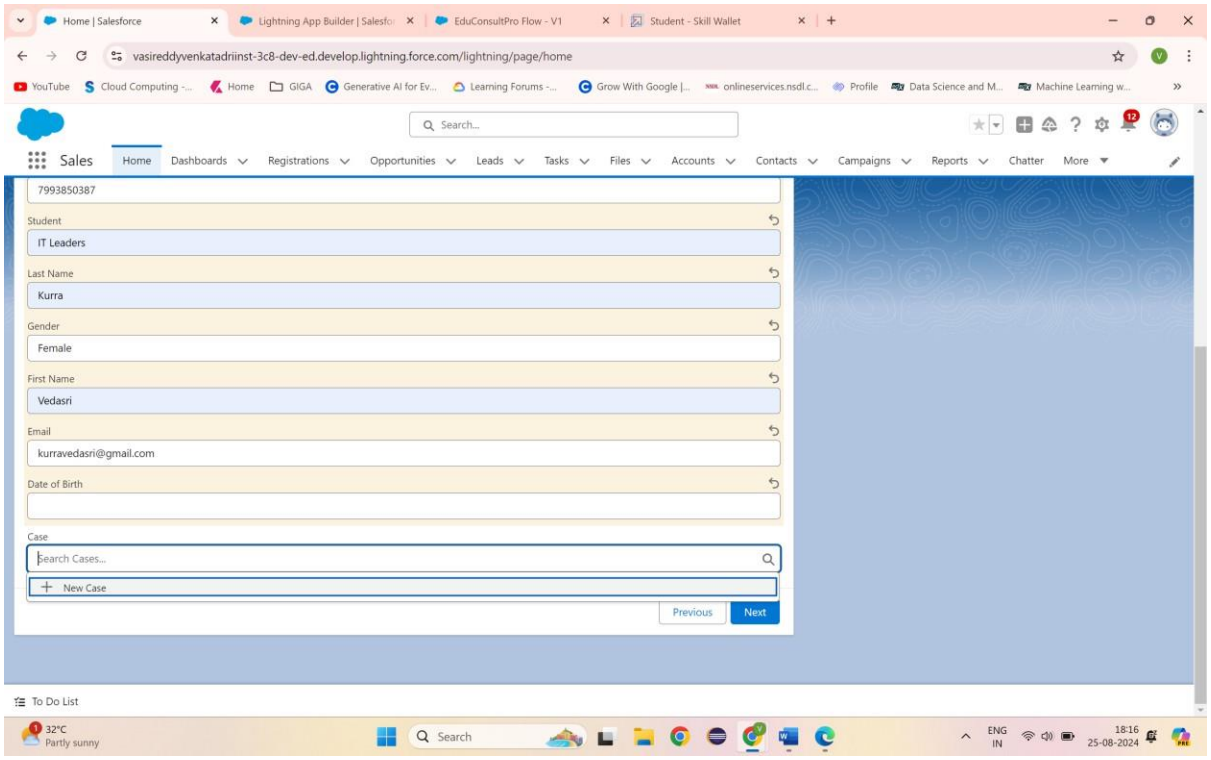
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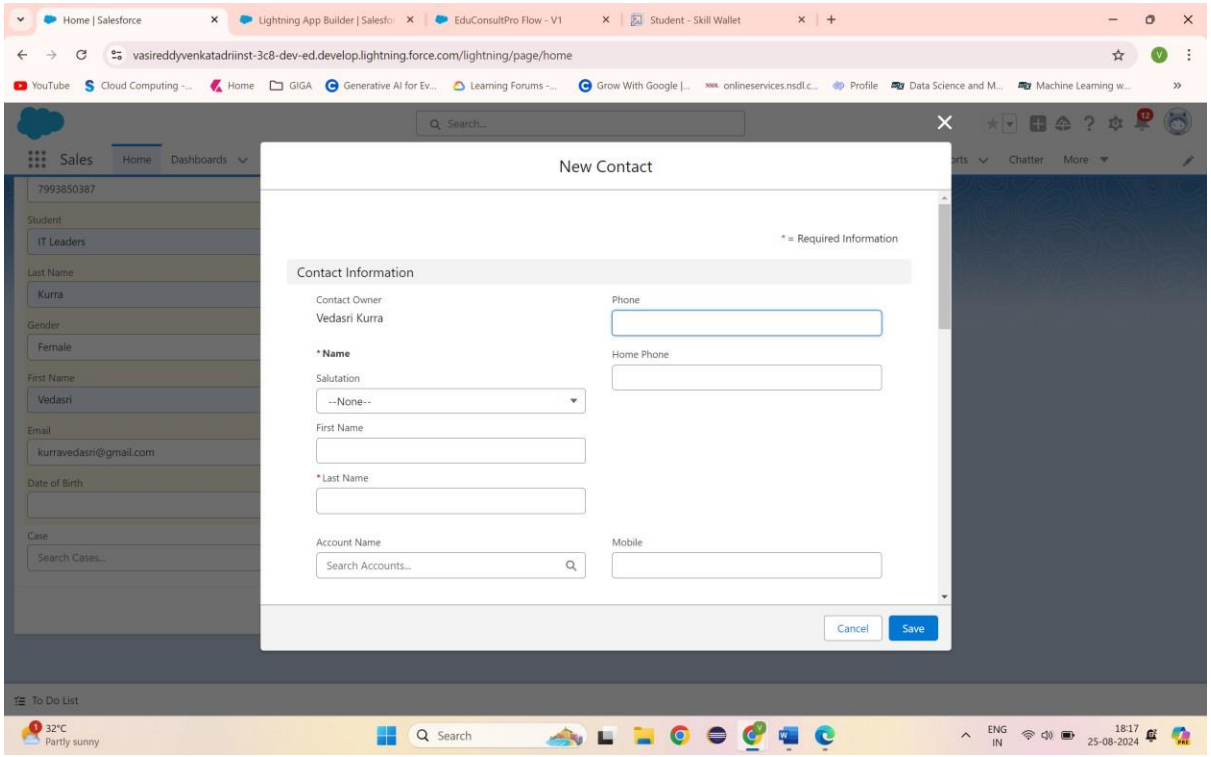
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Vedasri Kurra
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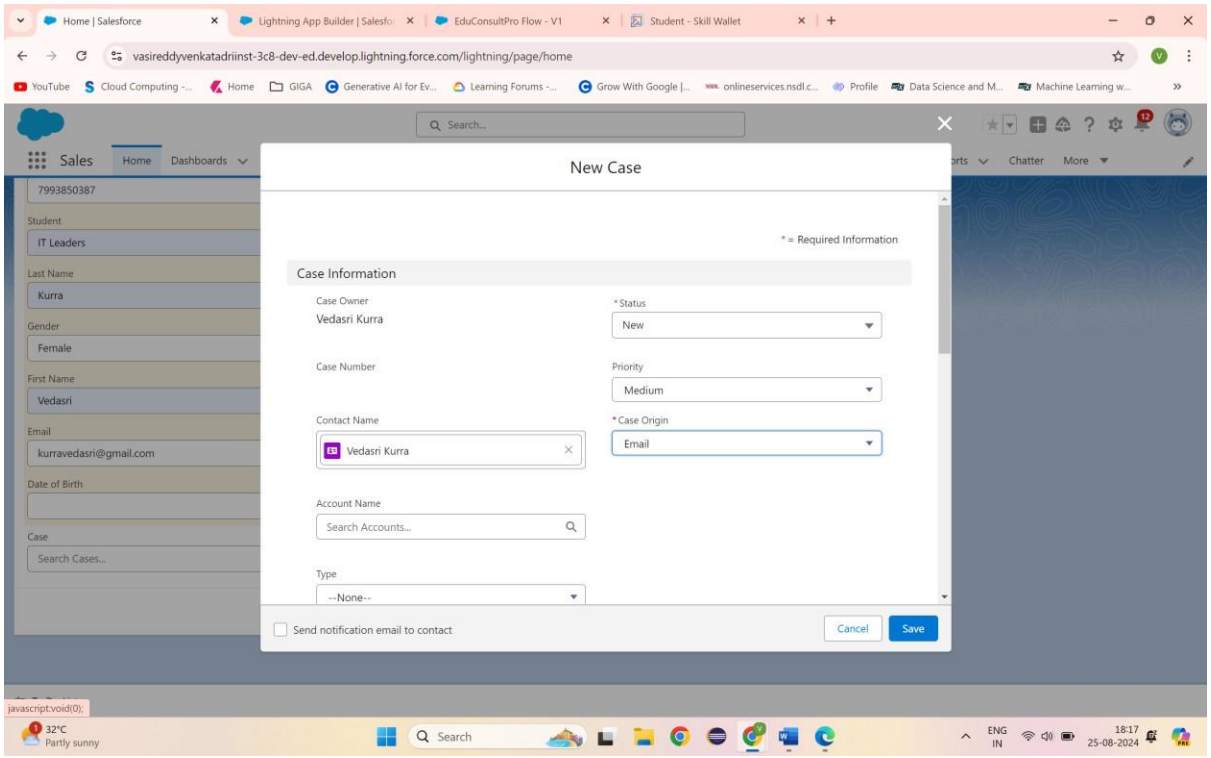
New Case
* = Required Information
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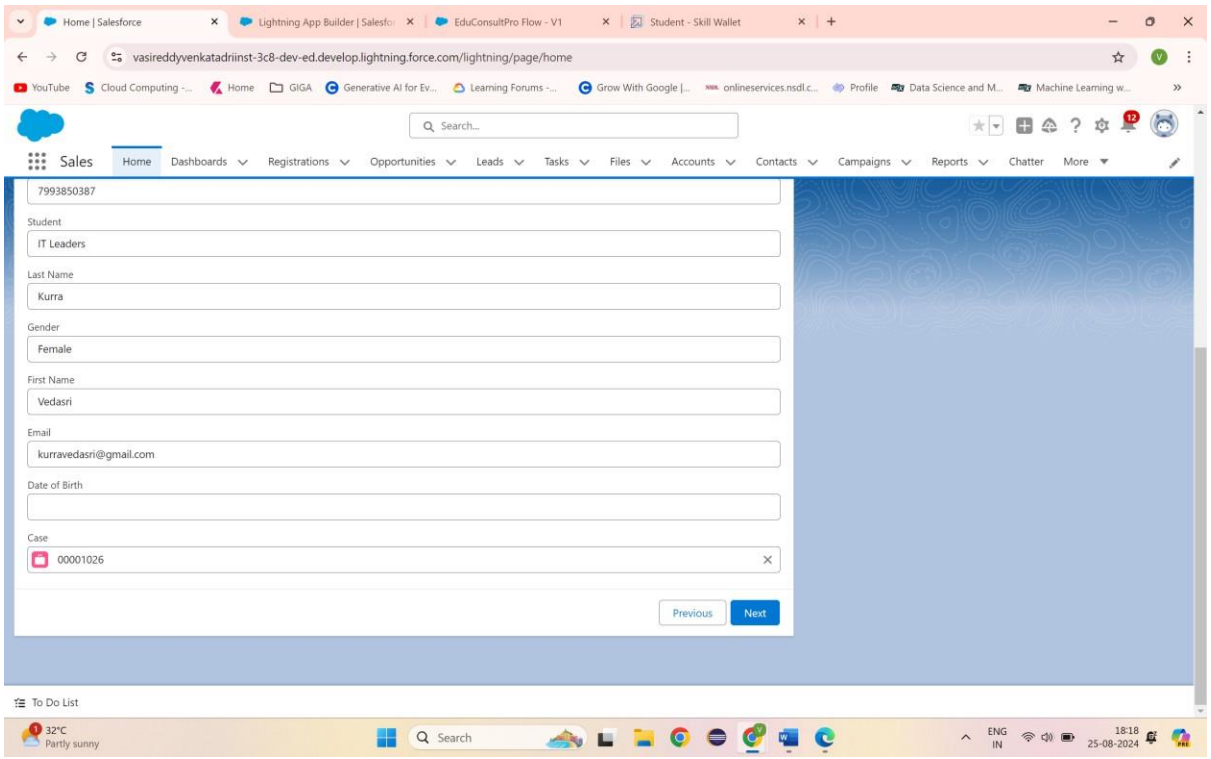
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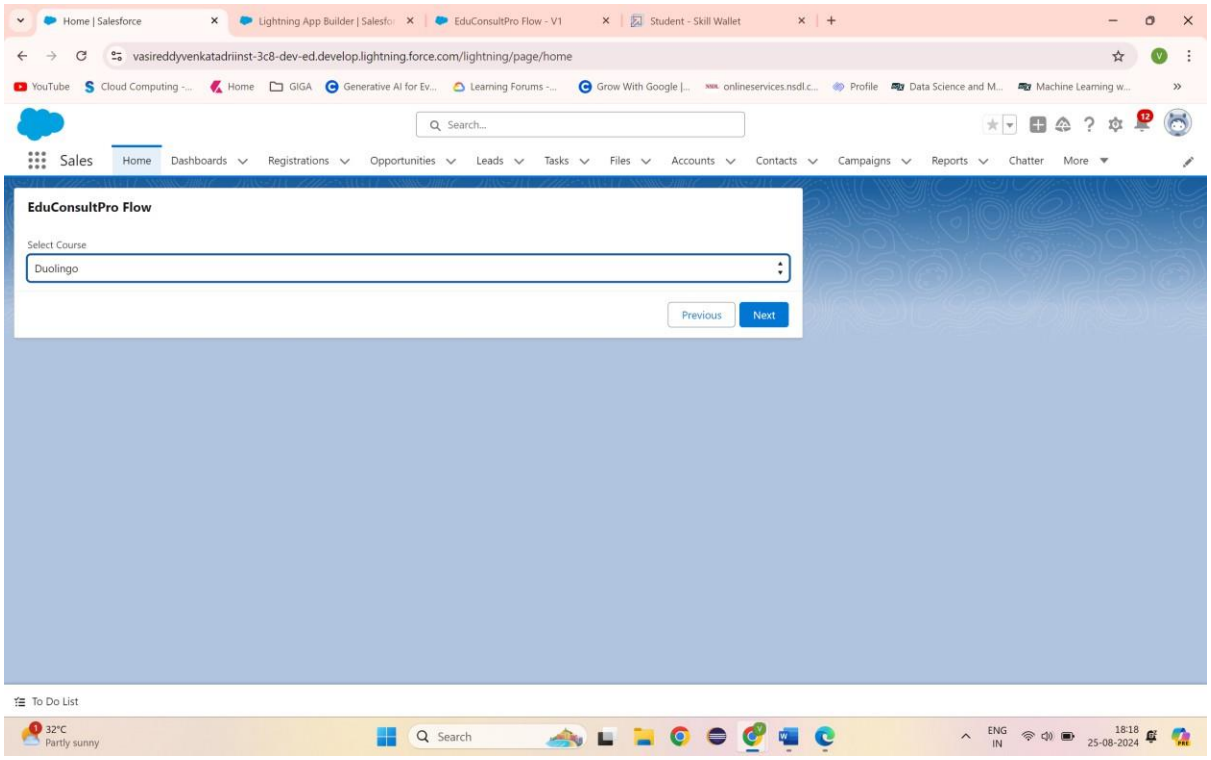
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25-08-2024

THANKYOU