

A CRM Application To Manage The Services Offered By Institution

By

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Project Title: A CRM Application to Manage the Services offered by an Institution

1. Project Overview

This project focuses on developing and implementing *ServiceConnect*, a comprehensive Customer Relationship Management (CRM) solution built on the Salesforce platform. It addresses the challenges faced by *EduConsultPro Institute* in managing its service lifecycle—from initial inquiry to service enrollment, ongoing support, and post-service follow-up. The goal is to create a centralized, efficient, and scalable system to enhance operational efficiency, improve communication, and provide data-driven insights. This will lead to an improved experience for customers and staff, fostering service excellence and supporting the long-term growth of *EduConsultPro Institute*.

2. Objectives

Business Goals:

- Enhance Student Onboarding: Streamline the application process for a smooth experience.
- Optimize Appointment Scheduling: User-friendly system minimizing scheduling conflicts.
- Improve Communication & Collaboration: Seamless information sharing between stakeholders.
- Boost Operational Efficiency: Automate tasks, reduce manual entry, and minimize errors.
- Data-Driven Decision Making: Gather data on trends and performance for informed decisions.
- Increase Student Enrollment and Retention: Positive student experience fostering engagement.
- Scalability and Future Growth: Adaptable solution for evolving institutional needs.

Specific Outcomes:

- Functional Salesforce CRM application named "EduConsultPro."
- Custom objects (Course, Consultant, Student, Appointment, Registration, etc.) with defined fields.
- Multi-stage screen flows for student application, appointment scheduling, and case management.
- Apex triggers for welcome case creation, appointment confirmations, and data validation.
- User-friendly Lightning App interface with custom dashboards for easy navigation.
- Intuitive appointment approval process with notifications.
- Comprehensive testing (unit and user acceptance) and deployment.
- Ongoing maintenance and support.
- Detailed documentation (data models, UI, logic, testing, training).

3. Salesforce Key Features and Concepts Utilized

- **Custom Objects & Fields:** Representing the institution's data model.
- **Relationships (Lookup & Master-Detail):** Linking related data between objects.
- **Lightning App Builder:** Creating a tailored and intuitive user interface.
- **Screen Flows:** Automating complex processes with user input screens and conditional logic.
- **Apex Triggers & Classes:** Enforcing business logic, data validation, and bulkification.
- **Approval Processes:** Managing authorization workflows with notifications.
- **Standard Objects (e.g., Case):** Handling student inquiries and support.
- **Email Templates & Alerts:** Standardized communication for various

events.

4. Detailed Steps to Solution Design

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.

SETUP > OBJECT MANAGER
Course

Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

Details

Description

API Name
Course__c

Custom

✓

Singular Label
Course

Plural Label
Course

Enable Reports
✓

Track Activities
✓

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

- **Create Remaining Objects:** Similar to the Course object, custom objects were created for Consultant, Student, Appointment, and Registration using the provided spreadsheets. Field mapping ensured data integrity during the import process.

LABEL	* API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Consultant - Consultant	Consultant__Consultant__c	Custom Object		25/12/2024	✓

LABEL	* API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Student - Student	Student__Student__c	Custom Object		27/12/2024	✓

LABEL	* API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Appointment - Appointment	Appointment__Appointment__c	Custom Object		25/12/2024	✓

- **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 object

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			▼

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

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.

Setup Home Object Manager

Q app mana

Apps

App Manager

External Client Apps

External Client App Manager

Didn't find what you're looking for? Try using Global Search.

SETUP Lightning Experience App Manager

New Lightning App New Connected App

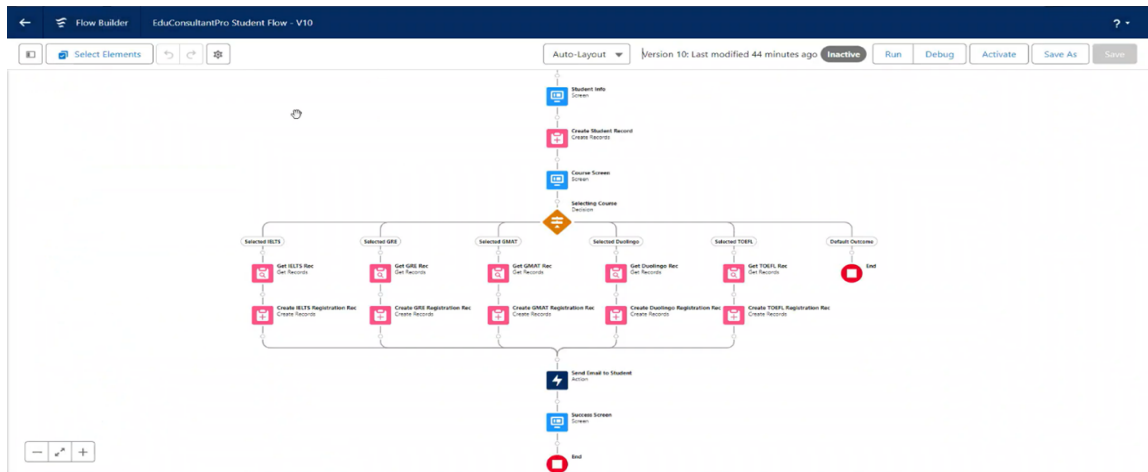
24 Items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

App Name ↑	Developer Name	Description	Last Modified D...	App ...	Visi...
3 App Launcher	AppLauncher	App Launcher tabs	2/1/10/2024, 1:19 pm	Classic	✓
4 Automation	FlowsApp	Automate business processes and repetitive tasks.	27/10/2024, 1:22 pm	Lightning	✓
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	27/10/2024, 1:19 pm	Lightning	✓
6 Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform complex lookups and calculations.	27/10/2024, 1:23 pm	Lightning	✓
7 Community	Community	Salesforce CRM Communities	27/10/2024, 1:19 pm	Classic	✓
8 Content	Salesforce CRM Content	Salesforce CRM Content	27/10/2024, 1:19 pm	Classic	✓
9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	27/10/2024, 1:19 pm	Lightning	✓
10 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	27/10/2024, 1:19 pm	Lightning	✓
11 EduConsultPro	Edu		27/10/2024, 3:14 pm	Lightning	✓

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> New User Reset Password(s) Add Multiple Users </div>						
<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dns000009h8px2aa.vi1n8jtgabeh@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Consultant	cons	322103382043@gypce.ac.in		✓	Standard Platform User
<input type="checkbox"/> Edit	Ommi, Sandeep	SOmmi	sandeep@project.sandbox		✓	System Administrator
<input type="checkbox"/> Edit	User, Integration	integ	integration@00dns000009h8px2aa.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User, Security	sec	insightssecurity@00dns000009h8px2aa.com		✓	Analytics Cloud Security User
<div> New User Reset Password(s) Add Multiple Users </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.

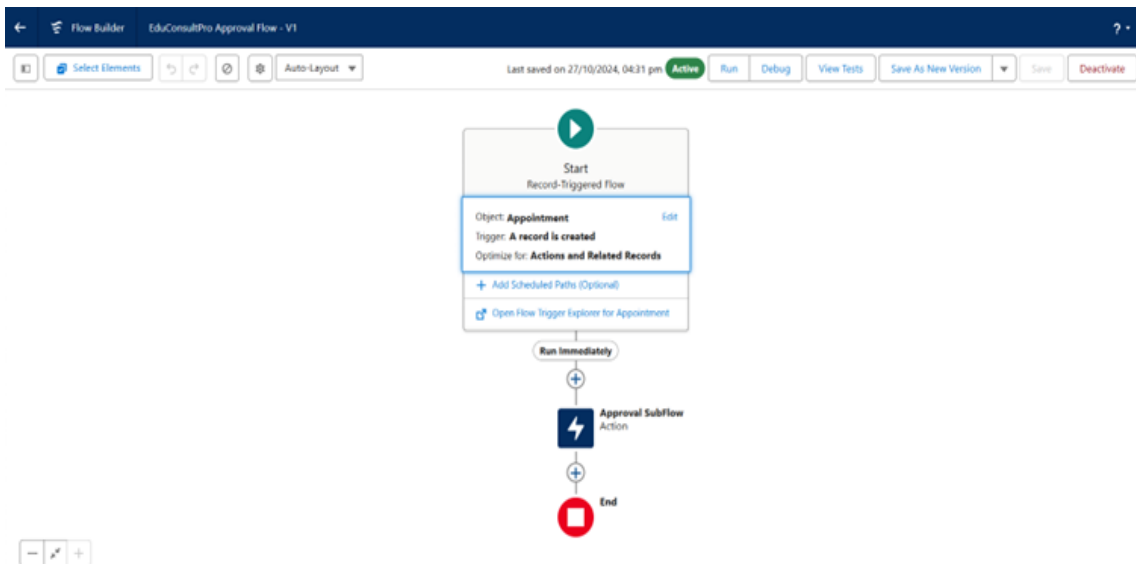
Email Template Name	Description	Folder	Last Modified By	Last Modified Date
Rejection Template		project	Sandeep Ommi	3/1/2025, 2:10 pm
Approval Template		project	Sandeep Ommi	3/1/2025, 2:10 pm
Submission Template		project	Sandeep Ommi	3/1/2025, 2:06 pm

- **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	De
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 using the Submit for Approval action.

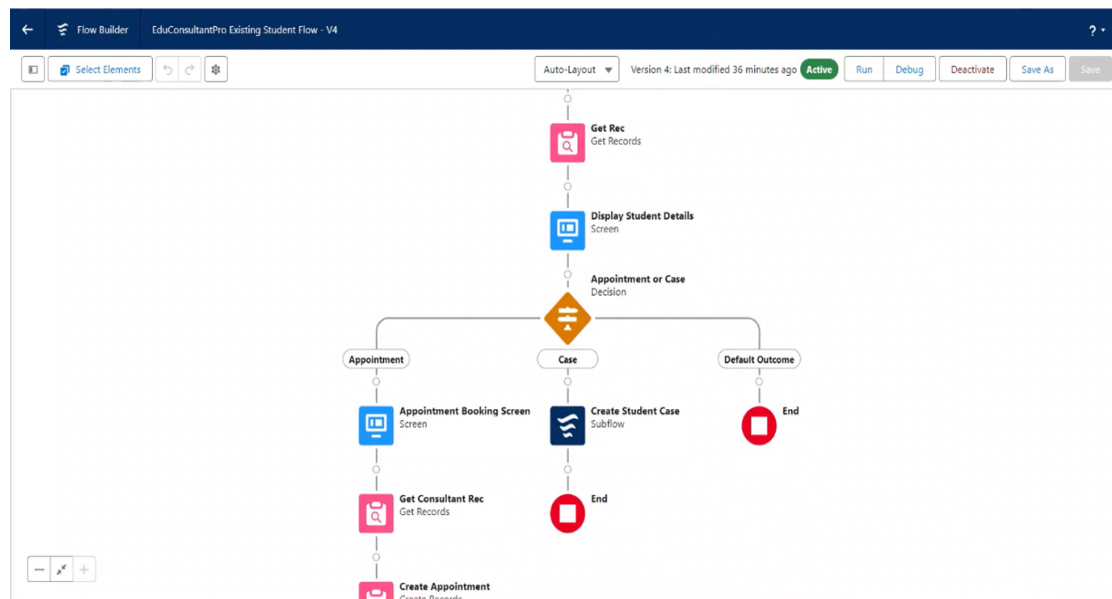


Create A ScreenFlow For Existing Student To Book An Appointment

- **Add Screen Element (Get Student Info):** Collects existing student's name

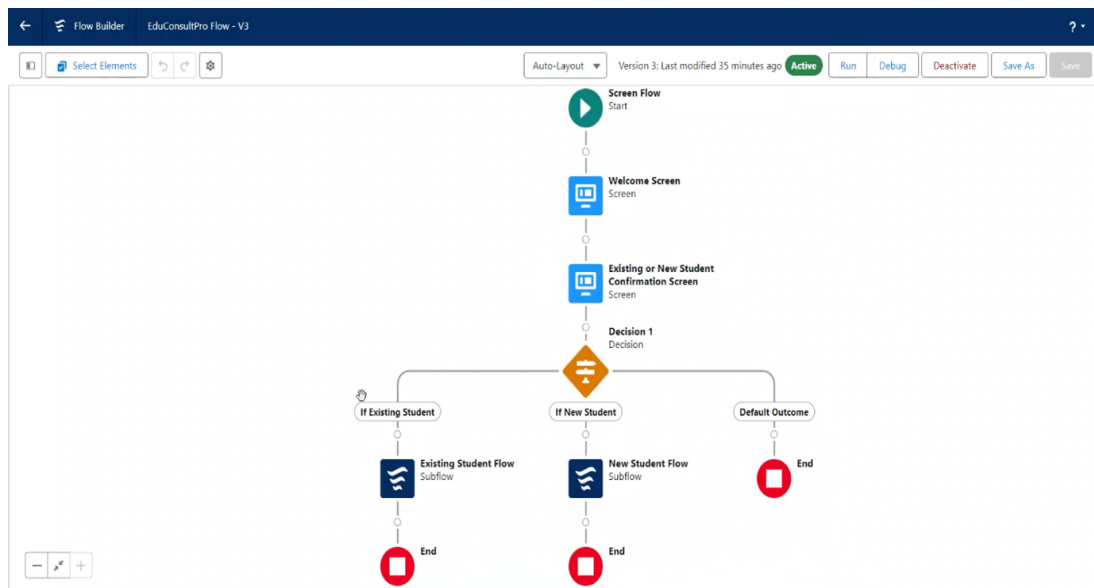
and email.

- **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 Booking Screen):** 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).



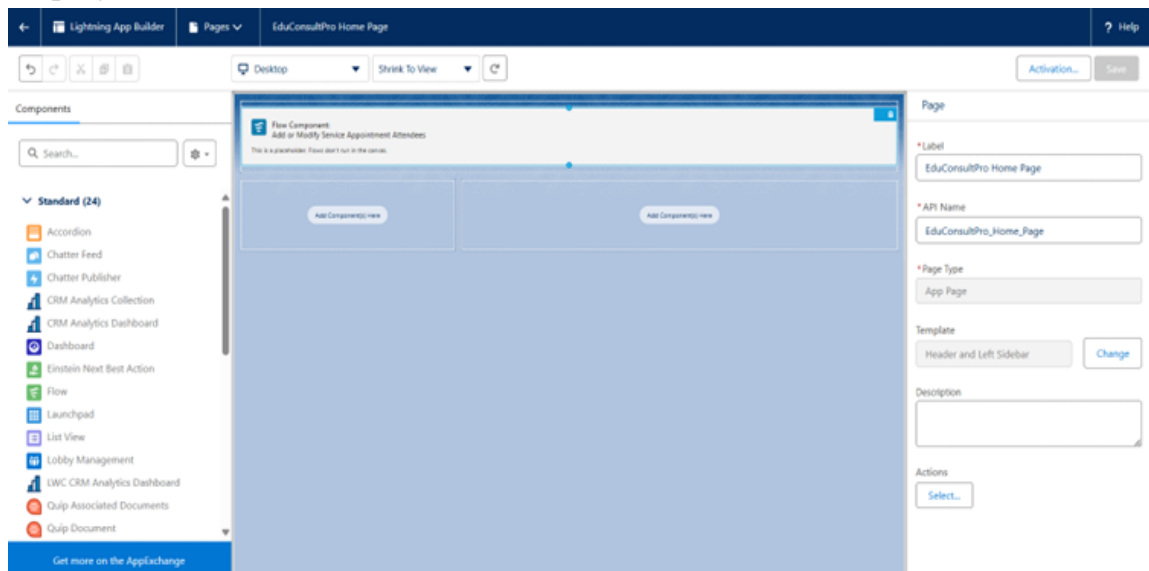
Create A ScreenFlow To Combine All The Flows At One Place

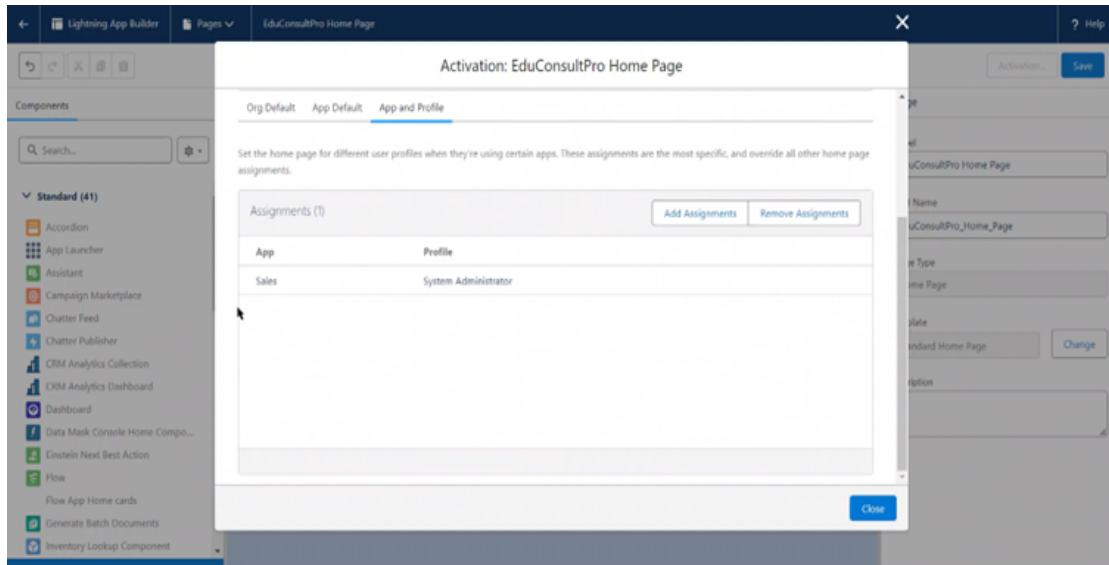
- **Add Screen Element (Welcome Screen):** Displays a welcome message.
- **Add Screen Element (Existing or New Student Confirmation Screen):** Asks the user if they are an existing student.
- **Add Decision Element (Decision 1):** Routes the flow based on user input (Existing/New Student).
- **Add An 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. Testing and Validation

- **Unit Testing:** Apex unit tests with high code coverage for all triggers and classes.
- **Integration Testing:** Verification of interactions between objects and standard functionality.
- **User Acceptance Testing (UAT):** Real-world testing by users for usability and effectiveness.
- **Performance Testing:** Ensuring system responsiveness and stability under various loads.

```

Trigger.Lapset * Trigger2.appt *
Code Coverage: None * API Version: 62
1 // Trigger 1: Automatically create a welcome case when a new student is created
2 * trigger StudentTrigger on Student__c (after insert) {
3     List<Case> casesToInsert = new List<Case>();
4
5     for(Student__c student : Trigger.new) {
6         // Create a welcome case for each new student
7         Case welcomeCase = new Case{
8             Subject = 'Welcome to EduConsultPro',
9             Description = 'Welcome to EduConsultPro! This case has been automatically created to track your initial onboarding.',
10            Status = 'Open',
11            Origin = 'New Student Registration',
12            Priority = 'Normal',
13            ContactEmail = student.Email__c,
14            Student__c = student.Id // Assuming there's a lookup field on Case to Student__c
15        };
16        casesToInsert.add(welcomeCase);
17    }
18
19    if(!casesToInsert.isEmpty()) {
20        try {
21            insert casesToInsert;
22        } catch(DMLException e) {
23            // Add error handling
24            for(Student__c student : Trigger.new) {
25                student.addError('Unable to create welcome case: ' + e.getMessage());
26            }
27        }
28    }

```

```

Trigger1.apxt * Trigger2.apxt *
Code Coverage: None * API Version: 62
1 // Trigger 2: Validate appointment scheduling and send notification
2 trigger AppointmentTrigger on Appointment__c (before insert, before update, after insert) {
3     if(Trigger.isBefore) {
4         // Validate appointment scheduling
5         for(Appointment__c appt : Trigger.new) {
6             // Check if appointment is during business hours (9 AM to 5 PM)
7             DateTime apptDateTime = DateTime.newInstance(
8                 appt.Appointment_Date__c,
9                 appt.Appointment_Time__c
10            );
11
12            Integer hourOfDay = apptDateTime.hour();
13
14            if(hourOfDay < 9 || hourOfDay >= 17) {
15                appt.addError('Appointments can only be scheduled between 9 AM and 5 PM');
16            }
17            // Check if consultant is available at the requested time
18            if(Trigger.isInsert || (Trigger.isUpdate &&
19                appt.Consultant__c != Trigger.oldMap.get(appt.Id).Consultant__c ||
20                appt.Appointment_Date__c != Trigger.oldMap.get(appt.Id).Appointment_Date__c ||
21                appt.Appointment_Time__c != Trigger.oldMap.get(appt.Id).Appointment_Time__c)) {
22                // Query for existing appointments
23                List<Appointment__c> existingAppointments = [
24                    SELECT Id
25                    FROM Appointment__c
26                    WHERE Consultant__c = :appt.Consultant__c
27                    AND Appointment_Date__c = :appt.Appointment_Date__c
28                    AND Appointment_Time__c = :appt.Appointment_Time__c
29                    AND Id != :appt.Id
30                ];
31
32                if(!existingAppointments.isEmpty()) {
33                    appt.addError('Consultant is already booked for this time slot');
34                }
35            }
36        }
37    }
38 }
39
40
41 if(Trigger.isAfter && Trigger.isInsert) {
42     // Send email notifications
43     List<Messaging.SingleEmailMessage> emailsToSend = new List<Messaging.SingleEmailMessage>();
44
45     for(Appointment__c appt : Trigger.new) {
46         // Query for related records to get email addresses
47         Appointment__c apptWithRelations = [
48             SELECT Id, Student_r.Email__c, Consultant_r.Email__c,
49                 Appointment_Date__c, Appointment_Time__c
50             FROM Appointment__c
51             WHERE Id = :appt.Id
52         ];
53     }

```

```

54         // Create email for student
55         if(apptWithRelations.Student__r.Email__c != null) {
56             Messaging.SingleEmailMessage studentEmail = new Messaging.SingleEmailMessage();
57             studentEmail.setToAddresses(new List<String>{apptWithRelations.Student__r.Email__c});
58             studentEmail.setSubject('Appointment Confirmation');
59             studentEmail.setPlainTextBody(
60                 'Your appointment has been scheduled for ' +
61                 apptWithRelations.Appointment_Date__c.format() + ' at ' +
62                 apptWithRelations.Appointment_Time__c.format() + '.'
63             );
64             emailsToSend.add(studentEmail);
65         }
66
67         // Create email for consultant
68         if(apptWithRelations.Consultant__r.Email__c != null) {
69             Messaging.SingleEmailMessage consultantEmail = new Messaging.SingleEmailMessage();
70             consultantEmail.setToAddresses(new List<String>{apptWithRelations.Consultant__r.Email__c});
71             consultantEmail.setSubject('New Appointment Scheduled');
72             consultantEmail.setPlainTextBody(
73                 'A new appointment has been scheduled for ' +
74                 apptWithRelations.Appointment_Date__c.format() + ' at ' +
75                 apptWithRelations.Appointment_Time__c.format() + '.'
76             );
77             emailsToSend.add(consultantEmail);
78         }
79     }
80
81     if(!emailsToSend.isEmpty()) {
82         try {
83             Messaging.sendEmail(emailsToSend);
84         } catch(Exception e) {
85             // Handle email sending errors
86             System.debug('Error sending appointment notification emails: ' + e.getMessage());
87         }
88     }
89 }
90 }

```

6. Key Scenarios Addressed by Salesforce in the Implementation Project

- **Multi-Channel Communication:** Personalized communication through email and the platform.
- **Role-Based Access Control:** Maintaining data security and confidentiality through access levels.
- **Reporting and Analytics:** Real-time monitoring of key metrics and KPIs.
- **Integration with Existing Systems (Future Consideration):** Flexibility for future expansion.

7. Conclusion

The "CRM Application to Manage the Services Offered by an Institution" project successfully developed a tailored Salesforce CRM for EduConsultPro Institute,

streamlining operations, enhancing communication, and centralizing key information.

With automated processes for admissions and appointment scheduling, the CRM reduces manual work, minimizes errors, and boosts staff efficiency. Automated email notifications keep students informed throughout their engagement, enriching the overall student experience.

By consolidating all relevant data, the CRM empowers EduConsultPro with comprehensive reporting and analytics, enabling data-driven decisions and continuous improvement. The flexible Salesforce platform supports future scalability, positioning EduConsultPro Institute to grow and adapt to evolving needs while delivering efficient, student-centered service management.