

CRM Application to Manage the Services Offered by Institution

1. Project Overview:

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

2. Objectives:

Business Goals

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

Specific Outcomes

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

3. SalesForce Key Features and Concepts Utilized:

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

4. Detailed Steps to Solution Design:

1. Create Objects From Spreadsheet:

- a) **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.

The screenshot shows the 'Object Manager' interface for the 'Course' object. The left sidebar lists various configuration options: 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, Scoping Rules, Object Access, and Triggers. The main 'Details' tab is selected. The 'Description' field is empty. The 'API Name' field is set to 'Course_Course__c'. Under the 'Custom' section, 'Singular Label' is set to 'Course - Course' and 'Plural Label' is also set to 'Course - Course'. On the right side, there are sections for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (unchecked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window').

- b) **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.

The screenshot shows the 'Object Manager' interface for the 'Consultant' object. The left sidebar lists the same configuration options as the Course object. The main 'Details' tab is selected. The 'Description' field is empty. The 'API Name' field is set to 'Consultant_Constant__c'. Under the 'Custom' section, 'Singular Label' is set to 'Consultant - Consultant' and 'Plural Label' is set to 'Consultant - Consultant'. On the right side, there are sections for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (unchecked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window').

The screenshot shows the 'Object Manager' interface for the 'Student' object. The left sidebar lists the same configuration options. The main 'Details' tab is selected. The 'Description' field is empty. The 'API Name' field is set to 'Student_Student__c'. Under the 'Custom' section, 'Singular Label' is set to 'Student - Student' and 'Plural Label' is set to 'Student - Student'. On the right side, there are sections for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (unchecked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window').

SETUP > OBJECT MANAGER

Appointment - Appointment

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 Scoping Rules Object Access Triggers	Details <hr/> Description API Name: Appointment_Appointment_c Custom: ✓ Singular Label: Appointment - Appointment Plural Label: Appointment - Appointment	Edit Delete
Enable Reports: ✓ Track Activities: ✓ Track Field History Deployment Status: Deployed Help Settings: Standard salesforce.com Help Window		

SETUP > OBJECT MANAGER

Registration

Fields & Relationships

6 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course Name	Course_Course__c	Lookup(Course - Course)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Registration No	Name	Auto Number		✓
Student Name	Student_Name__c	Lookup(Student - Student)		✓

c) **Create Relationship Among the Objects:** Lookup relationships were established between the objects to connect related data:

- Appointment to Student (Student lookup on Appointment object)
- Appointment to Consultant (Consultant lookup on Appointment object)
- A custom object, "Registration," was created to store student and course details. Lookup relationships were added:
 - Registration to Student
 - Registration to Course
- A lookup relationship was also established between Student and Case objects.

Fields & Relationships					
11 Items, Sorted by Field Label		Quick Find		New	Deleted Fields
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Appointment - Appointment	Name	Text(80)		✓	▼
Appointment Date/Time	Appointment_DateTime_c	Date/Time			▼
Appointment No	Appointment_No_c	Number(18, 0)			▼
Consultant	Consultant_c	Lookup(Consultant - Consultant)		✓	▼
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			▼
Student Name	Student_Name_c	Lookup(Student - Student)		✓	▼

d) 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

Case Field Type																																																			
Back to Case Fields																																																			
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Field Information <table border="1"> <tr> <td>Field Label</td> <td>Type</td> <td>Field Name</td> <td>Type</td> </tr> <tr> <td>Data Type</td> <td>Picklist</td> <td></td> <td></td> </tr> <tr> <td>Help Text</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Description</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Data Owner</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Field Usage</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Data Sensitivity Level</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Compliance Categorization</td> <td></td> <td></td> <td></td> </tr> </table>		Field Label	Type	Field Name	Type	Data Type	Picklist			Help Text				Description				Data Owner				Field Usage				Data Sensitivity Level				Compliance Categorization																					
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Setup > Object Manager
Case

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SETUP > OBJECT MANAGER
Case

Fields & Relationships

- Case Page Layouts
- Case Close 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
- Hierarchy Columns
- Scoping Rules
- Object Access

Case Field Status

[Back to Case Fields](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Status	Field Name	Status
Field Label	Picklist		
Data Type			
Help Text			
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Picklist Values Used

Active picklist values	6 (100 max)
Inactive picklist values	0

Field Dependencies

No dependencies defined.

[Field Dependencies Help](#)

Validation Rules

No validation rules defined.

[Validation Rules Help](#)

Case Status Picklist Values

[New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#)

Action	Values	API Name	Closed	Default	Chart Colors	Modified By	Modified On
Edit Deactivate	New	New	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assigned dynamically	BODDEPALLI RAMCHARANI	24/08/2024, 7:46 pm
Edit Del Deactivate	Working	Working	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	BODDEPALLI RAMCHARANI	24/08/2024, 7:46 pm
Edit Del Deactivate	Escalated	Escalated	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	BODDEPALLI RAMCHARANI	24/08/2024, 7:46 pm
Edit Del Deactivate	Closed	Closed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	BODDEPALLI RAMCHARANI	24/08/2024, 7:46 pm
Edit Del Deactivate	Open	Open	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	BODDEPALLI RAMCHARANI	27/10/2024, 6:56 pm
Edit Del Deactivate	In-progress	In-progress	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	BODDEPALLI RAMCHARANI	27/10/2024, 6:56 pm

Inactive Values

No Inactive Values values defined.

[Case Status Picklist Values Help](#)

SETUP > OBJECT MANAGER
Case

Fields & Relationships

- Case Page Layouts
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Edit Del Deactivate	In-progress	In-progress	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	BODDEPALLI RAMCHARANI	27/10/2024, 6:56 pm

Inactive Values

No Inactive Values values defined.

[Case Status Picklist Values Help](#)

e) 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

Lightning Experience App Manager

21 items • Sorted by Last Modified Date • Filtered by All appmenuitems - TabSet Type, App Type

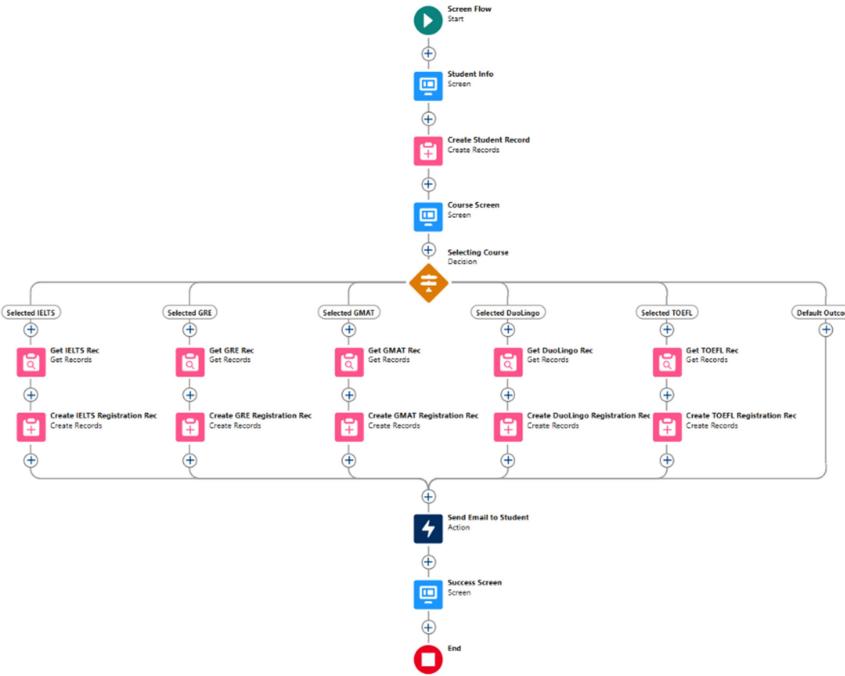
App Name	Developer Name	Description	Last Modified	Ap...	Vi...
EduConsultPro	EduConsultPro	Set up personalized appointment scheduling.	27/10/2024, 6:59 pm	Lightning	
Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	24/08/2024, 7:48 pm	Lightning	
Queue Management	QueueManagement	Create and manage queues for your business.	24/08/2024, 7:46 pm	Lightning	
All Tabs	AllTabSet		24/08/2024, 7:46 pm	Classic	
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	24/08/2024, 7:46 pm	Lightning	

2. 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.



3. 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.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Adanna_Diva	dadan	test_diva_pas_4w@bjybb6wik.tzrgsbskxx3ig8fovzvms t21wur3res0e@gypce.ac.in		<input checked="" type="checkbox"/>	LMS User
<input type="checkbox"/> Edit	Chatter Expert	Chatty	0dddm00000asyxuan.zqwhogkhg94@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Concepcion_Morales_Maria	mconc	m_c_morales.no.reply.10.07068458291328.bisbfliwxob.04d9bfb1m9c@gypce.ac.in	Research Team	<input checked="" type="checkbox"/>	Research Users
<input type="checkbox"/> Edit Login	Consultant	cons	consultant@example2.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit Login	Ellington_Amelia	aselli	amelia.ellington.1.46kxcpx9o0ldh.d5cwpdcio4wh.v8elkvazfslt@gypce.ac.in	Research Manager	<input checked="" type="checkbox"/>	Force.com - Free User
<input type="checkbox"/> Edit Login	Efigueroa_Jose	jfgu	J_figueroa.no.reply.22.6931448740514.upvvqghb6ul5cdy5ll0@gypce.ac.in	Research Team	<input checked="" type="checkbox"/>	Research Manager
<input type="checkbox"/> Edit	Oliveira_Leonardo	msonc	L_oliveira.no.reply.5.919560845016536.4ctvljcxup4.palmib0x12dw@gypce.ac.in	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	BRAMC	21131a4412@gypce.ac.in		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@0dddm00000asyxuan.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

4. 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 Templates						
Recent						
7 items						
EMAIL TEMPLATES	Email Template Name	Description	Folder	Last Modified By	Last Modified Date	
Recent	Rejection		Edu Folder	BODDEPALLI RAMCHARANI	27/10/2024, 11:01 pm	<input type="checkbox"/>
Created by Me	Approval		Edu Folder	BODDEPALLI RAMCHARANI	27/10/2024, 11:00 pm	<input type="checkbox"/>
Private Email Templates	Submission Template		Edu Folder	BODDEPALLI RAMCHARANI	27/10/2024, 10:50 pm	<input type="checkbox"/>
Public Email Templates	Enhancement Request Approved	Enhancement Request Approval email template	Public Email Templates	BODDEPALLI RAMCHARANI	24/8/2024, 7:46 pm	<input type="checkbox"/>
All Email Templates	New Enhancement Request	New Enhancement Request email template	Public Email Templates	BODDEPALLI RAMCHARANI	24/8/2024, 7:46 pm	<input type="checkbox"/>
FOLDERS						
All Folders						
Created by Me						
Shared with Me						

- Create An Approval Process: An approval process for the Appointment object was configured. The manager of the submitting user was designated as the approver. Recordeditability 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.

Manage Approval Processes For: Appointment - Appointment

A listing of both active and inactive approval processes for Appointment - Appointment is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

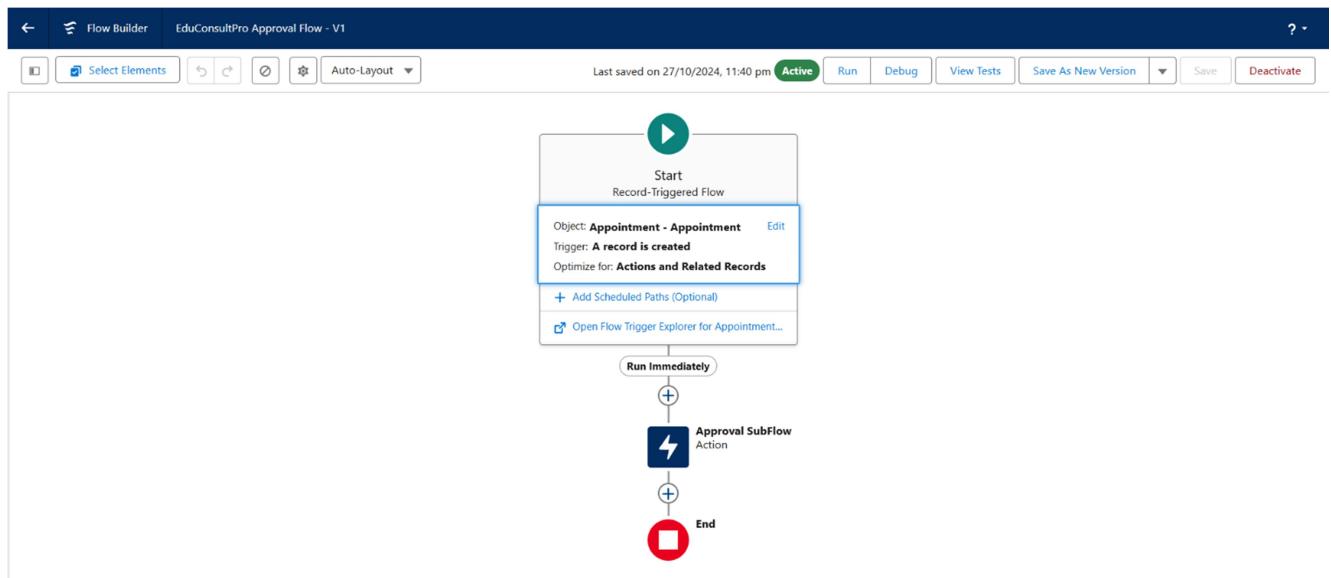
Create New Approval Process ▾

Active Approval Processes		Reorder
No approval processes available		

Inactive Approval Processes		Description
Action	Approval Process Name	Description
Edit Activate Del	Appointment Approval	

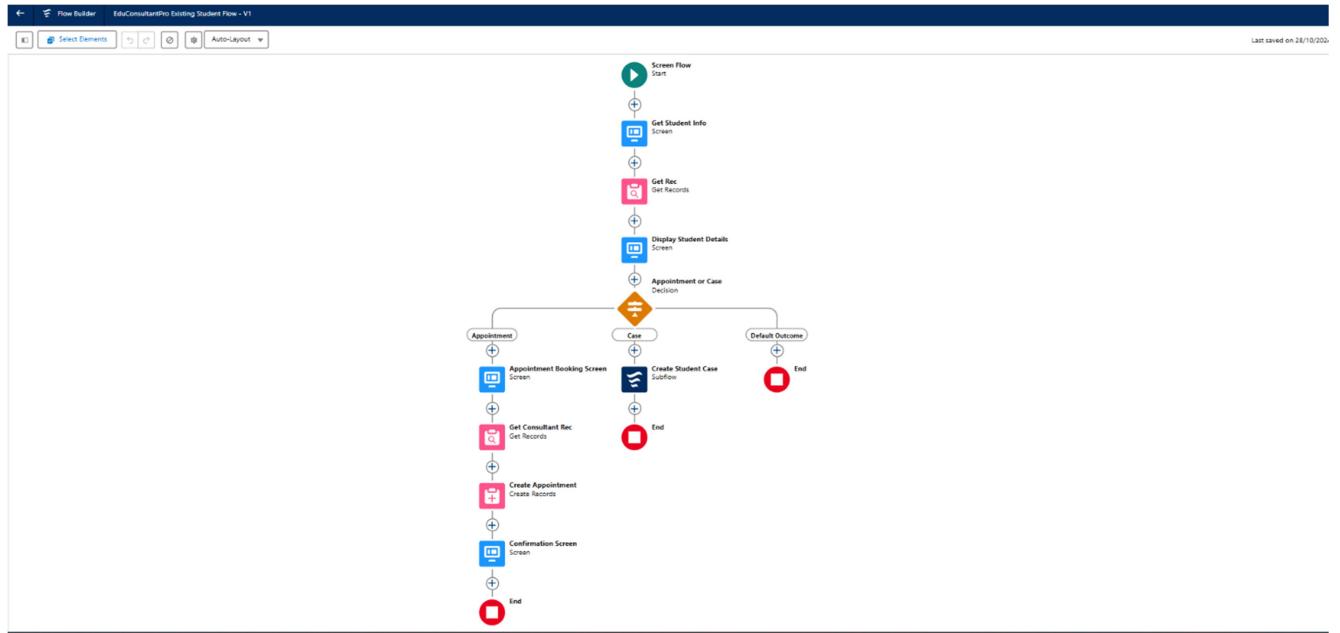
5. Create A Record Triggered Flow

- 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



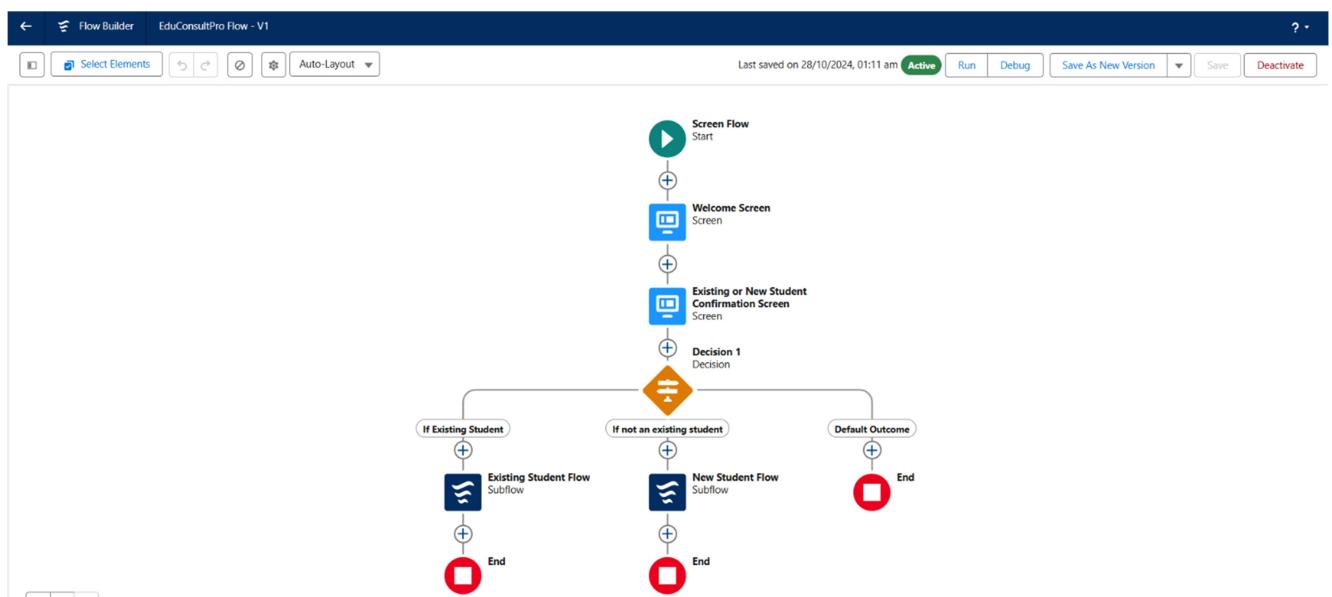
6. Create A ScreenFlow For Existing Student To Book An Appointment

- 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 enteredname and email.
- Add Decision Element (Appointment or Case): Determines whether the student wants to book an appointment or create a case (this branch of the flow wasn't fully described in the original instructions, so requires further definition). Presumably, a screen would be needed before this decision element to offer those choices.
- Add Screen Element (Appointment BookingScreen): Displays fields from the Appointmentobject for the student to fill in. AppointmentRecordRes resource is used.
- Add GET Record Element (Get Consultant Rec): Retrieves the Consultant record based onthe 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 withappointment details.
- Add An SubFlow Element (Create Student Case): (This was under the "Case" path of theDecision element and requires further definition, assuming it involves creating a Case record if the student chose that option).



7. 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).



8. 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.

The screenshot shows the Salesforce Lightning App Builder interface. At the top, it says "Lightning App Builder" and "Pages". The main area is titled "EduConsultPro Home Page". On the left, there's a sidebar with "Components" and a search bar. The main canvas has two empty placeholder boxes labeled "Add Component(s) Here". To the right, there are configuration fields:

- Page**
- *Label**: EduConsultPro Home Page
- *API Name**: EduConsultPro_Home_Page
- *Page Type**: Home Page
- Template**: Standard Home Page
- Description**: (empty)

At the bottom right of the main area, there are "Activation..." and "Save" buttons.

This is a modal dialog titled "Activation: EduConsultPro Home Page". It contains information about home page assignments:

- The org default home page is displayed unless more specific assignments are made.
- The app default home page is displayed for specified apps, and overrides the org default.
- Any app and profile assignments are displayed for specified app and profile combinations, and they override all other assignments.

Below this, it says "Set the home page for different user profiles when they're using certain apps. These assignments are the most specific, and override all other home page assignments." There is a table titled "Assignments ()":

App	Profile
Sales	System Administrator

Buttons at the bottom include "Add Assignments", "Remove Assignments", and "Close". The background of the dialog is semi-transparent, showing the original Lightning App Builder interface.

4. Key Scenarios Addressed by Salesforce in the Implementation Project

- **Admission Application Management:** Prospective students can submit applications online, receive automated confirmations, and admissions staff can track and analyze application data.
- **Consulting Services Management:** Students submit consulting requests online, consultants manage requests through an approval process, and appointments are scheduled within Salesforce.
- **Immigration Case Management:** Students initiate immigration cases via multiple channels, and agents manage cases with tracking and documentation features in Salesforce.

- **Property Approval Process:** Automated approval workflow for Property object, with relevant alerts for streamlined review and approval.
- **Integrated User Flows:** Consolidated ScreenFlow enabling admissions staff to access all flows, including applications, consulting, and immigration, from one interface.

5. Conclusion

Summary of Achievements

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