

# **A crm application to manage the services offered by a institution**

## **Project Overview**

The CRM Application for Institutional Services Management is a software solution designed to centralize, streamline, and automate the management of services offered by an institution. Built on Salesforce, it provides a unified platform to handle customer interactions, monitor service delivery, and enhance communication between staff and customers. The application ensures data accuracy, improves operational efficiency, and supports real-time decision-making with insightful reports and dashboards.

## **Objectives**

### **1. Real-Time CRM Implementation**

Learn to build and configure a Salesforce-based CRM system tailored to manage institutional services using real-world scenarios.

### **2. Data Modeling**

Design and implement custom objects, fields, and relationships to represent services, customers, and interactions within the Salesforce data model.

### **3. Creating an Application**

Develop a custom Lightning App with tabs, page layouts, and specific configurations to meet business needs.

### **4. User Interface Customization**

Customize the UI using page layouts, record types, and tabs to provide a seamless experience for institutional staff.

### **5. Bulk Data Import**

Use Salesforce Data Import Wizard or Data Loader for efficient migration of large data sets, simulating real-world data scenarios.

### **6. Security Implementation**

Apply role-based access control, permission sets, profiles, and organization-wide default (OWD) settings to protect sensitive information.

## 7. Group Collaboration

Leverage Salesforce Chatter for enhanced communication and coordination between teams.

## 8. Reports and Dashboards

Generate reports and dashboards to monitor service performance, customer interactions, and overall efficiency.

# Key Features and Concepts Utilized

**Centralized Management:** A single source of truth for all institutional services and customer interactions.

**Improved Productivity:** Automation of repetitive tasks allows teams to focus on strategic objectives.

**Enhanced Data Accuracy:** Real-time synchronization ensures data integrity.

**Advanced Security:** Role-based permissions safeguard sensitive information.

**Data-Driven Decision-Making:** Dashboards and reports provide actionable insights.

## Solution Design

### 1. Data Model Documentation

Create an entity-relationship diagram (ERD) showcasing custom objects (e.g., Customer, Service, Feedback) and their relationships.

Define fields with data types and validation rules, and document relationships (e.g., lookup, master-detail).

Object Manager | Salesforce | Object creator

object-creator.salesforce.com/load-data-wizard.xhtml

Create a custom object from a spreadsheet

Define object and fields

Choose the data source, map fields and their types, and import field data.

CSV File Details

Encoding Format: Unicode (UTF8) | Values Separated By: Comma | Field Label Source: Detect from row | Field Labels Row: 1 | Import 2 rows of Data?: Yes, import data | Record Name Field: Let Salesforce Create a Default

Fields 12 of 12 to import | Hide mapped fields

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS	FIELD PREVIEW
Student Name	Student Name	Text	<input checked="" type="checkbox"/>	Anjali Sharma
First Name	First Name	Text	<input checked="" type="checkbox"/>	Anjali
Last Name	Last Name	Text	<input checked="" type="checkbox"/>	Sharma
Date of Birth	Date of Birth	Date	<input checked="" type="checkbox"/>	13/08/2000

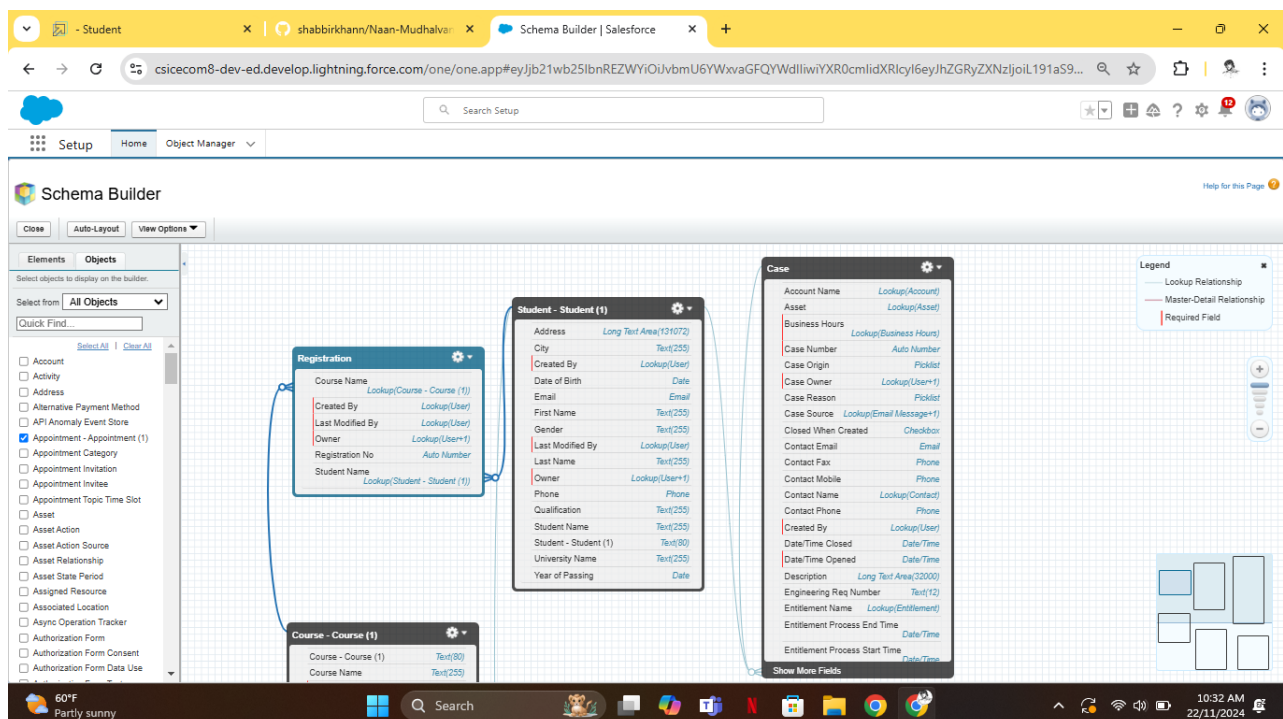
Back | Next

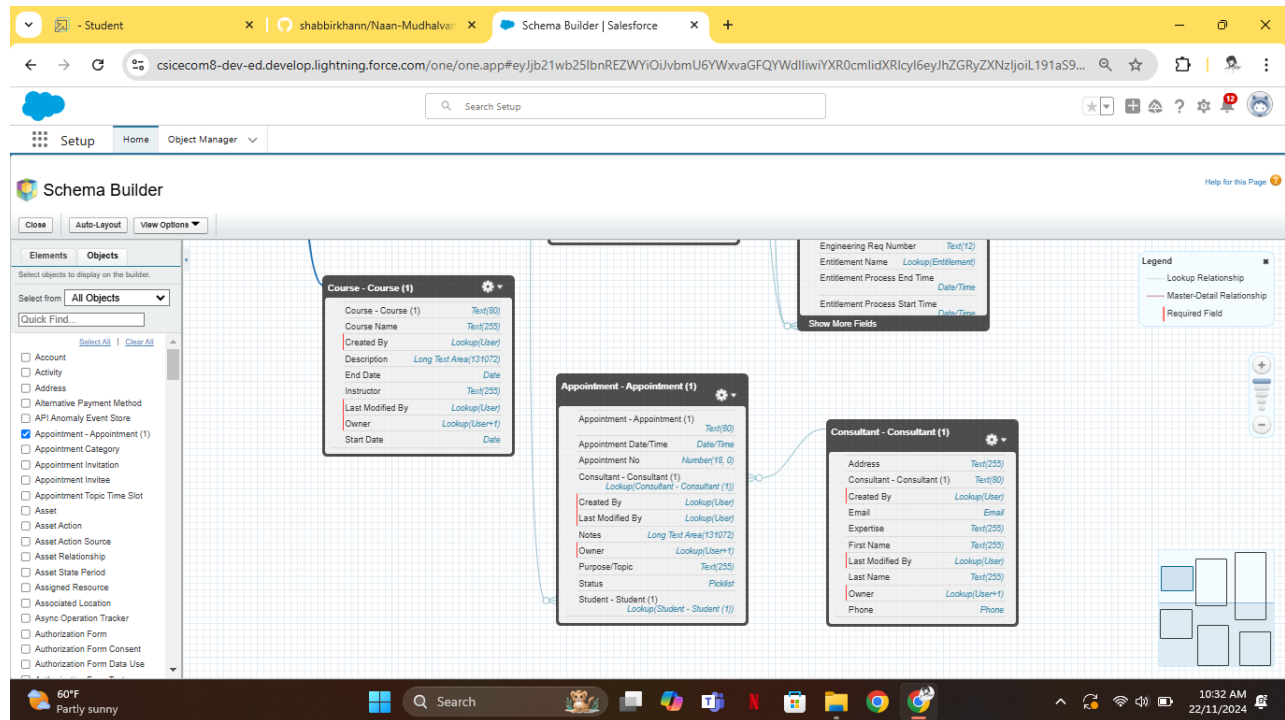
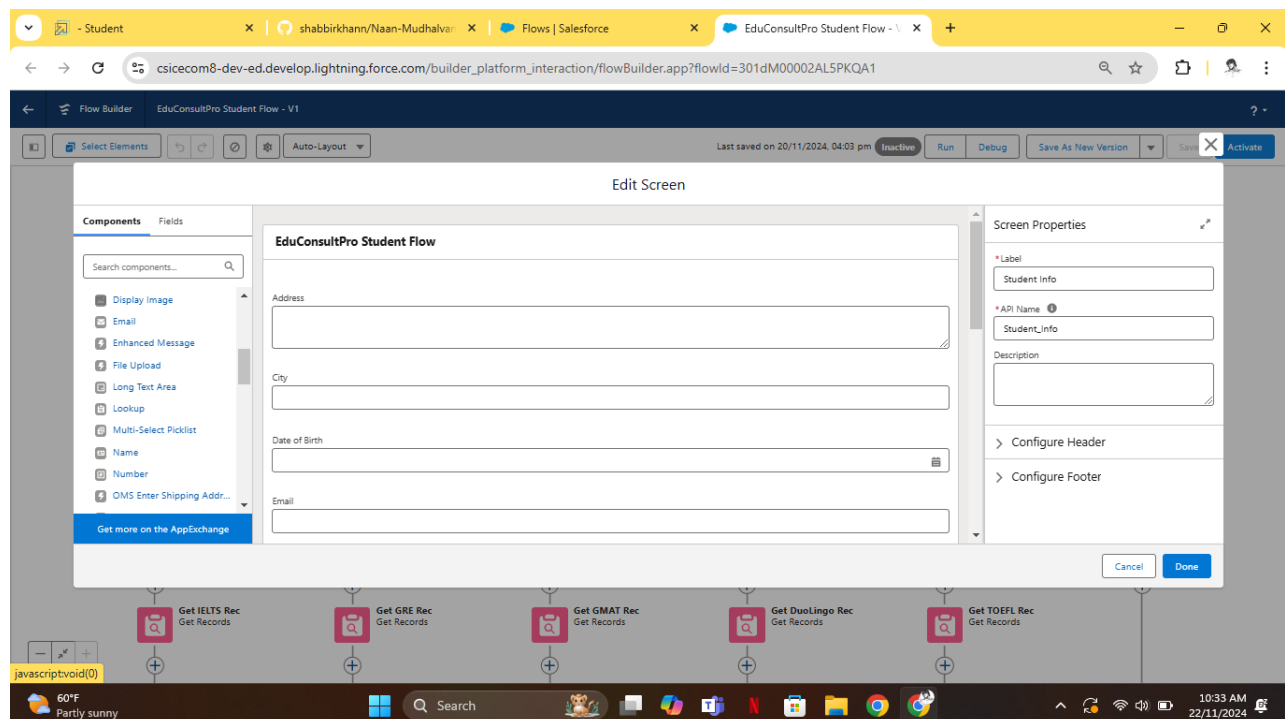
## 2. User Interface Design Documentation

**Lightning App Design:** Include screenshots of the homepage and descriptions of tabs like Service, Customer, and Feedback.

**Custom Tabs:** Highlight features like search, list views, and detailed record layouts.

**Page Layouts:** Detail field groupings and their purposes, supported with annotated screenshots.



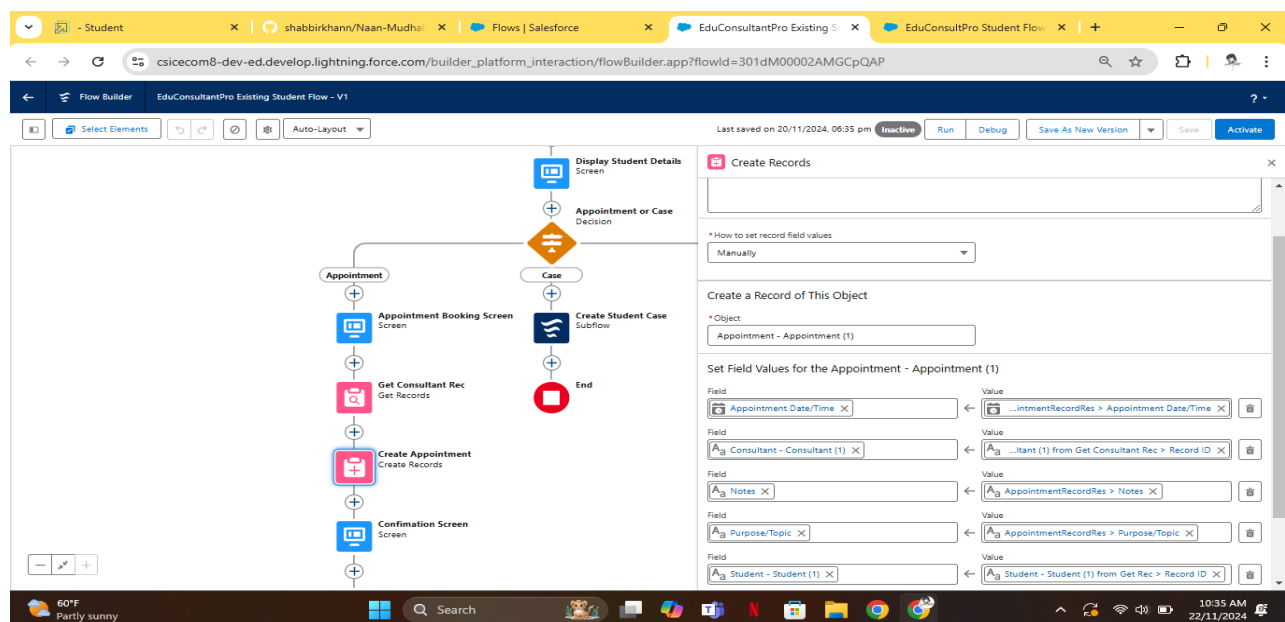
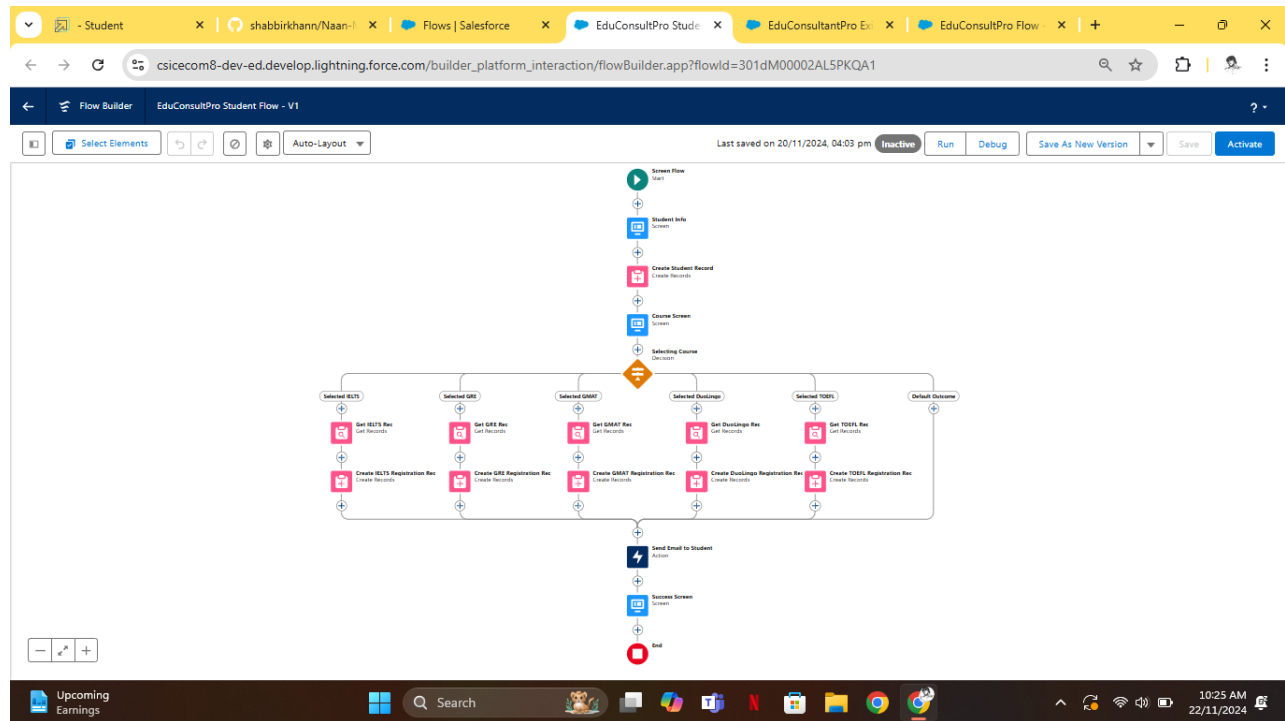
The screenshot shows the Salesforce Flow Builder interface for the 'EduConsultPro Student Flow'. The 'Edit Screen' is active, displaying a form with fields for Address, City, Date of Birth, and Email. The 'Components' panel on the left lists various components like Display Image, Email, Enhanced Message, File Upload, Long Text Area, Lookup, Multi-Select Picklist, Name, Number, and OMS Enter Shipping Addr... The 'Screen Properties' panel on the right shows the 'Label' as 'Student Info' and the 'API Name' as 'Student\_info'. The flow diagram at the bottom shows a sequence of steps: 'Get IELTS Rec Get Records', 'Get GRE Rec Get Records', 'Get GMAT Rec Get Records', 'Get DuoLingo Rec Get Records', and 'Get TOEFL Rec Get Records'. The flow is currently 'Inactive' and was last saved on 20/11/2024 at 04:03 pm.

### 3. Business Logic Documentation

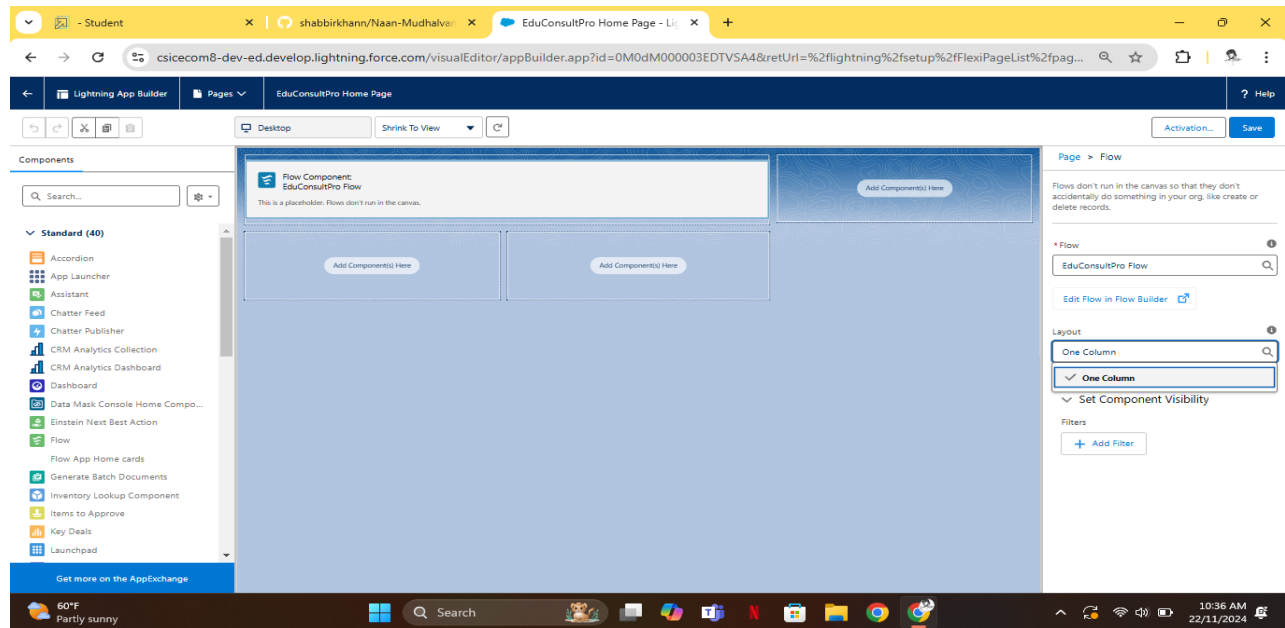
**Apex Triggers:** Automate updates such as service status changes. Provide descriptions and code snippets.

**Approval Processes:** Use flowcharts to illustrate stages (e.g., customer feedback review).

**Workflow Rules:** Automate notifications for critical events (e.g., service delivery completion).



## Process Builder and Flow: Document automated flows, including diagrams and screenshots



## Conclusion

The implementation of this CRM application has successfully enhanced the institution's ability to manage services efficiently. By centralizing data, automating workflows, and ensuring robust security, the platform empowers staff to focus on delivering excellent services. Customizable dashboards and real-time insights further enable data-driven decision-making, ensuring the institution remains adaptive and customer-focused. This project highlights Salesforce's capability in transforming institutional operations through digital innovation.