

A CRM Application to Manage the Services offered by an Institution

BY

YAJALI SNEHITHA

yajalisnehitha257@gmail.com

Project Abstract

EduConsultPro Institute is a leading educational institution offering a variety of courses and programs in diverse fields. With a growing number of prospective students seeking admission each year, the institute faces challenges in managing the admission process, student enquiries, and expert consulting services efficiently. To address these challenges, EduConsultPro Institute decides to leverage Salesforce CRM to streamline the admission process and enhance the overall experience for both students and admissions staff. The use case focuses on the admission process for prospective students interested in enrolling in courses and programs offered by EduConsultPro Institute. The goal is to provide a seamless and transparent experience for students while enabling admissions staff to review efficiently and process admission applications, student enquiries, and case management.

INDEX Page

Topics		Page no
Topic 1	Create Objects from Spreadsheet	5
Topic 2	Create a ScreenFlow for Student Admission Application process.	11
Topic 3	Create Users	12
Topic 4	Create an Approval Process for Property Object	13
Topic 5	Create a Record Triggered Flow	15
Topic 6	Create a ScreenFlow for Existing Student to Book an Appointment	16
Topic 7		17

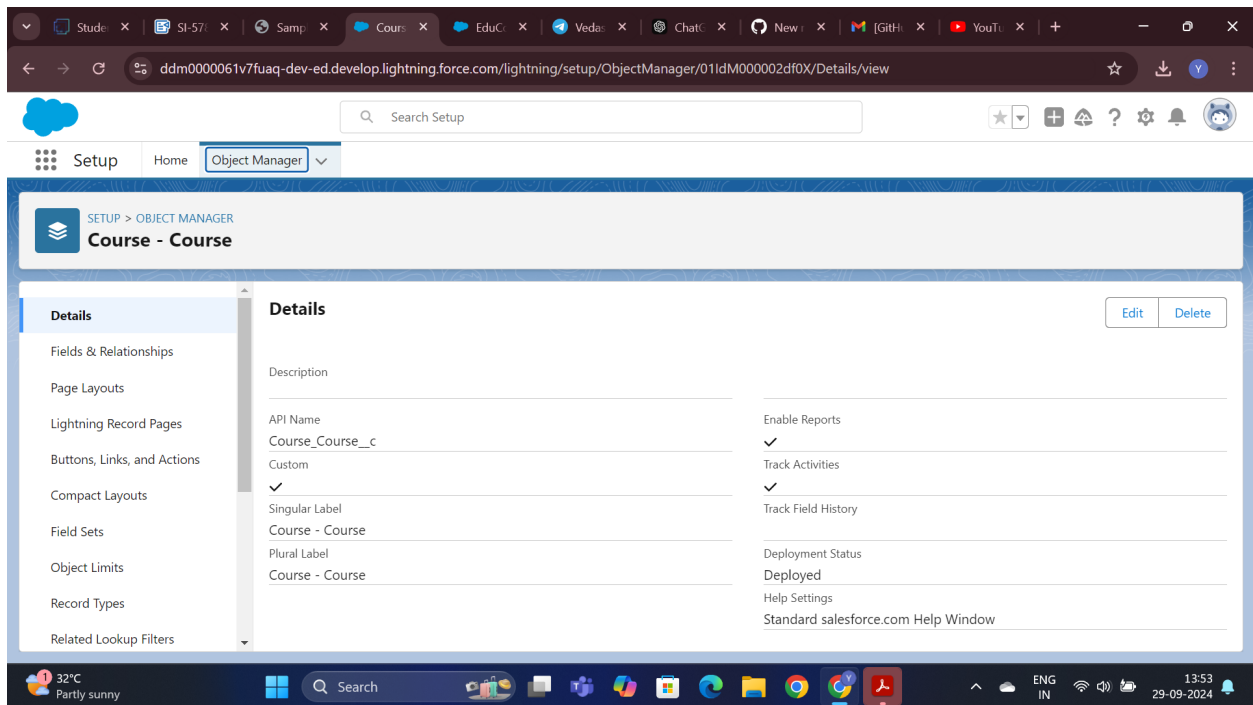
	Create a ScreenFlow to Combine all the flows at one place	
Topic 8	Create a lightning app page	18

INTRODUCTION

Task 1:

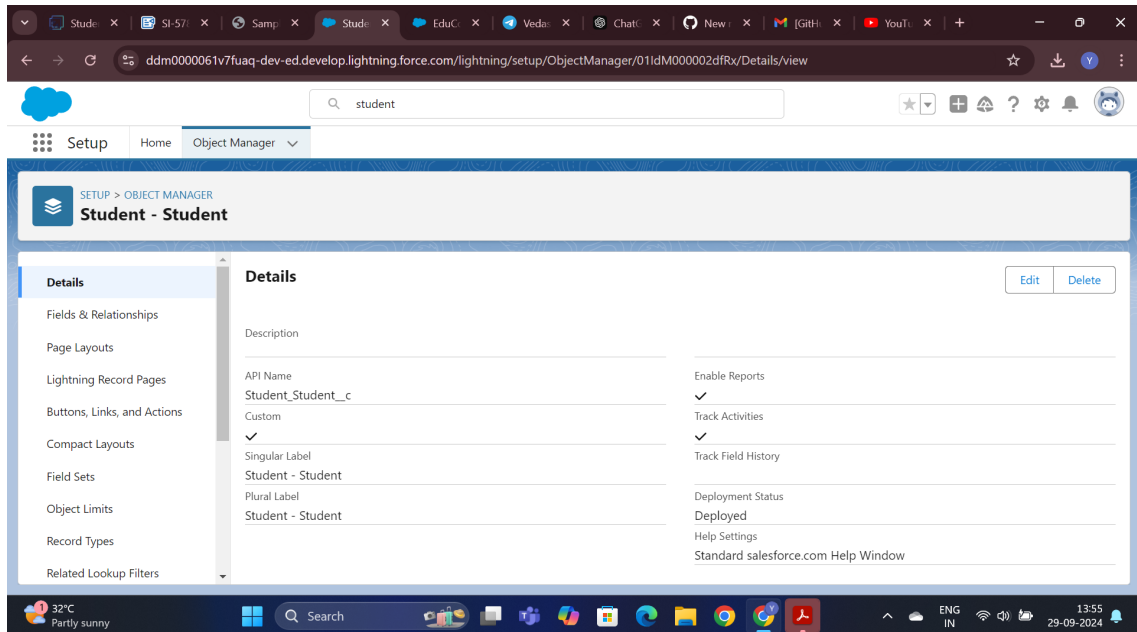
Create Objects from Spreadsheet

Create Course object



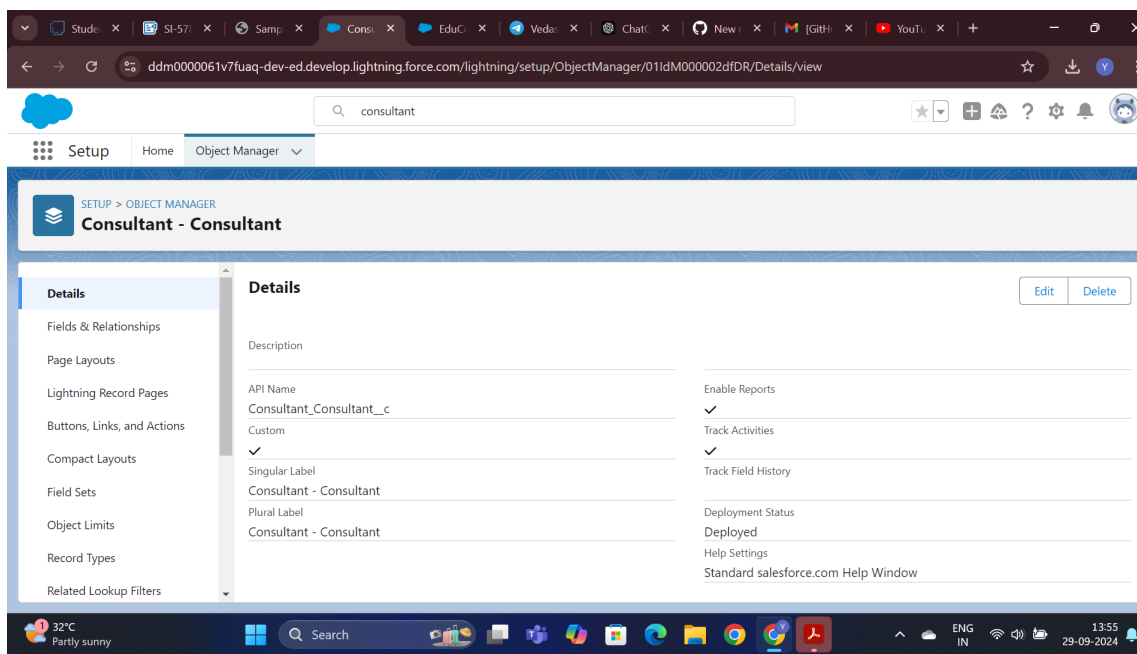
Create Remaining objects

1. Follow the steps which we have followed for course object creation.
2. Use the following sheets for remaining objects.
 1. [Consultant](#)
 2. [Student](#)
 3. [Appointment](#)



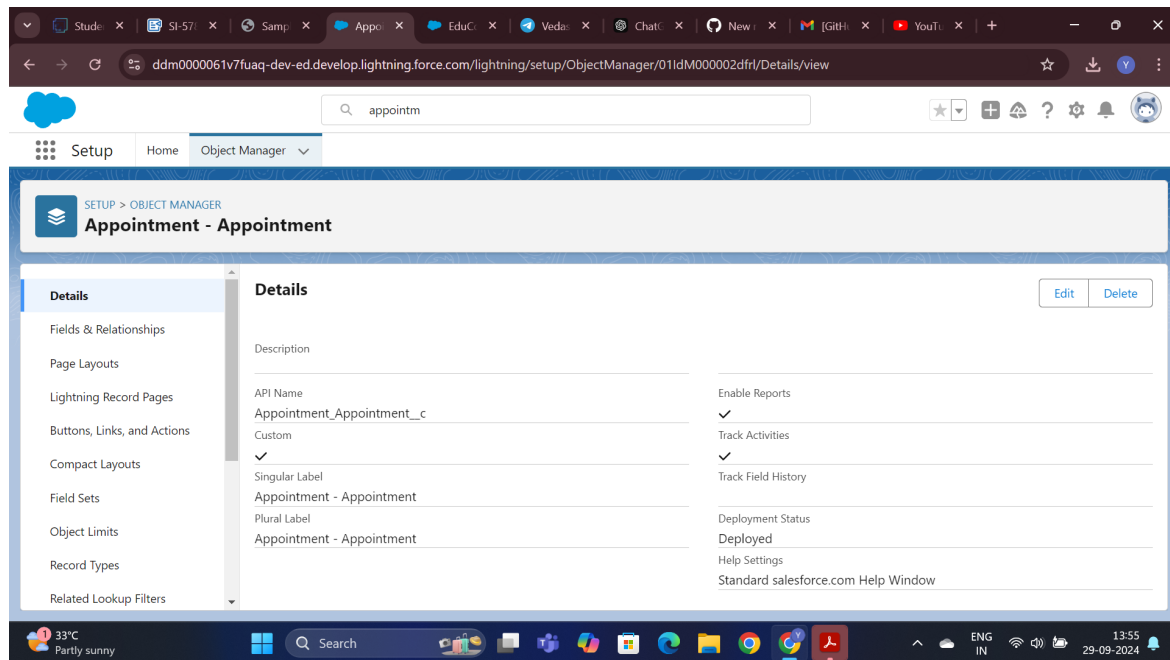
The screenshot shows the Salesforce Setup interface for the 'Student' object. The browser address bar displays the URL: `ddm0000061v7fuaq-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000002dFRx/Details/view`. The search bar contains the text 'student'. The left sidebar shows the 'Object Manager' menu. The main content area is titled 'Student - Student' and includes a 'Details' section with the following fields:

Field	Value
Description	
API Name	Student_Student__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Student - Student
Plural Label	Student - Student
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window



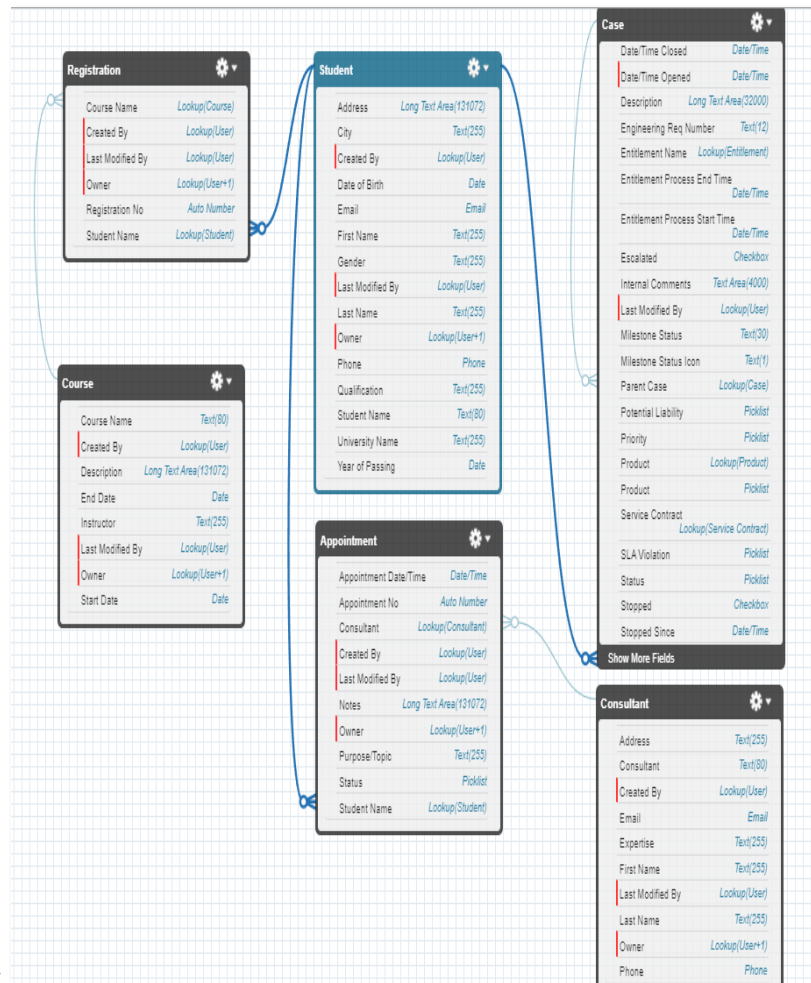
The screenshot shows the Salesforce Setup interface for the 'Consultant' object. The browser address bar displays the URL: `ddm0000061v7fuaq-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000002dFRx/Details/view`. The search bar contains the text 'consultant'. The left sidebar shows the 'Object Manager' menu. The main content area is titled 'Consultant - Consultant' and includes a 'Details' section with the following fields:

Field	Value
Description	
API Name	Consultant_Consultant__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Consultant - Consultant
Plural Label	Consultant - Consultant
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window



Create Relationship among the objects

1. Create a lookup between appointment and student, appointment and consultant.
2. Create an object to store the information student and course details with the name Registration.
3. Also create a lookup between student and case to store the student queries for immigration or visa application.
4. The data model should be similar to the below Data Model with fields &

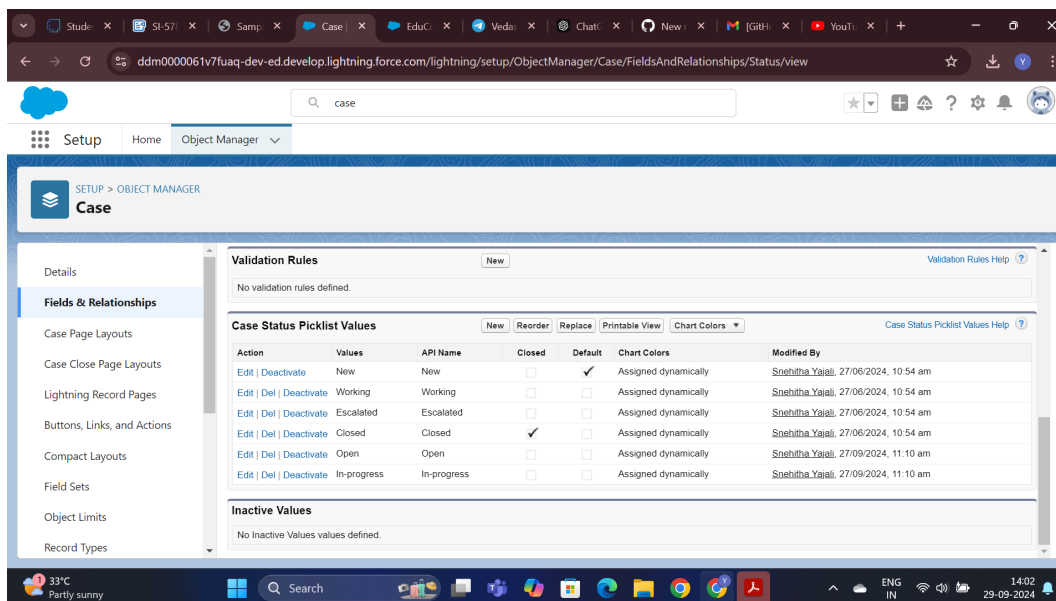
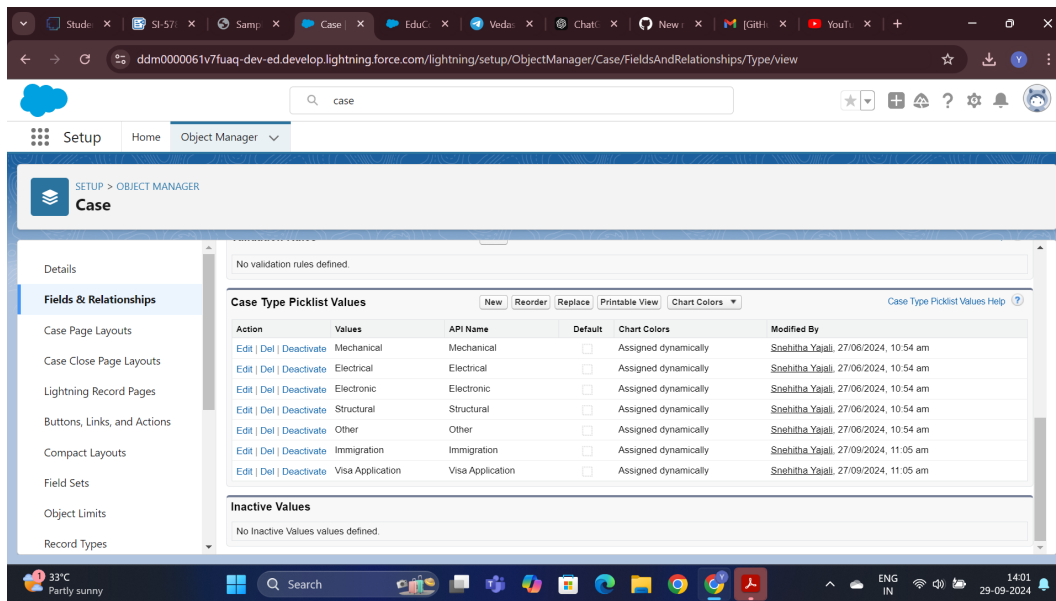


relationships:

5. Create tabs for the respective object.

Configure the Case Object

1. Go to the object manager, edit the case object.
2. Select the "Type" field and add the values in it.
 - Immigration
 - Visa Application
3. Now Select the "Status" field and add the values in it.
 - Open
 - In-progress



Create a Lightning App

1. Go to Setup, search for the App Manager in quick find
2. Click on New Lightning App
3. Give app name as “EduConsultPro”, click Next, Next, Next
4. Add Home, Students, Courses, Consultants, Appointments, Registrations, and

Cases from the Available Items to Selected Items.

5. Add the “System Administrator” profile from Available Profiles to Selected Profiles, click Save & Finish.

Search Setup

Setup Home Object Manager

app manager

Apps

App Manager

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

Lightning Experience App Manager

New Lightning App New Connected App

21 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name	Developer Name	Description	Last Modified	Ap...	Vi...
5	Community	Community	Salesforce CRM Communities	27/06/2024, 10:54 am	Classic	✓
6	Content	Content	Salesforce CRM Content	27/06/2024, 10:54 am	Classic	✓
7	Data Manager	DataManager	Use Data Manager to view limits, monitor usage,...	27/06/2024, 10:54 am	Lightning	✓
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	27/06/2024, 10:54 am	Lightning	✓
9	EduConsultPro	EduConsultPro		27/09/2024, 11:35 am	Lightning	✓
10	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning ...	27/06/2024, 10:54 am	Lightning	✓
11	Marketing CRM Cla...	Marketing	Track sales and marketing efforts with CRM obje...	27/06/2024, 10:54 am	Classic	✓
12	Platform	Platform	The fundamental Lightning Platform	27/06/2024, 10:54 am	Classic	
13	Queue Management	QueueManagement	Create and manage queues for your business.	27/06/2024, 10:54 am	Lightning	✓

33°C Partly sunny

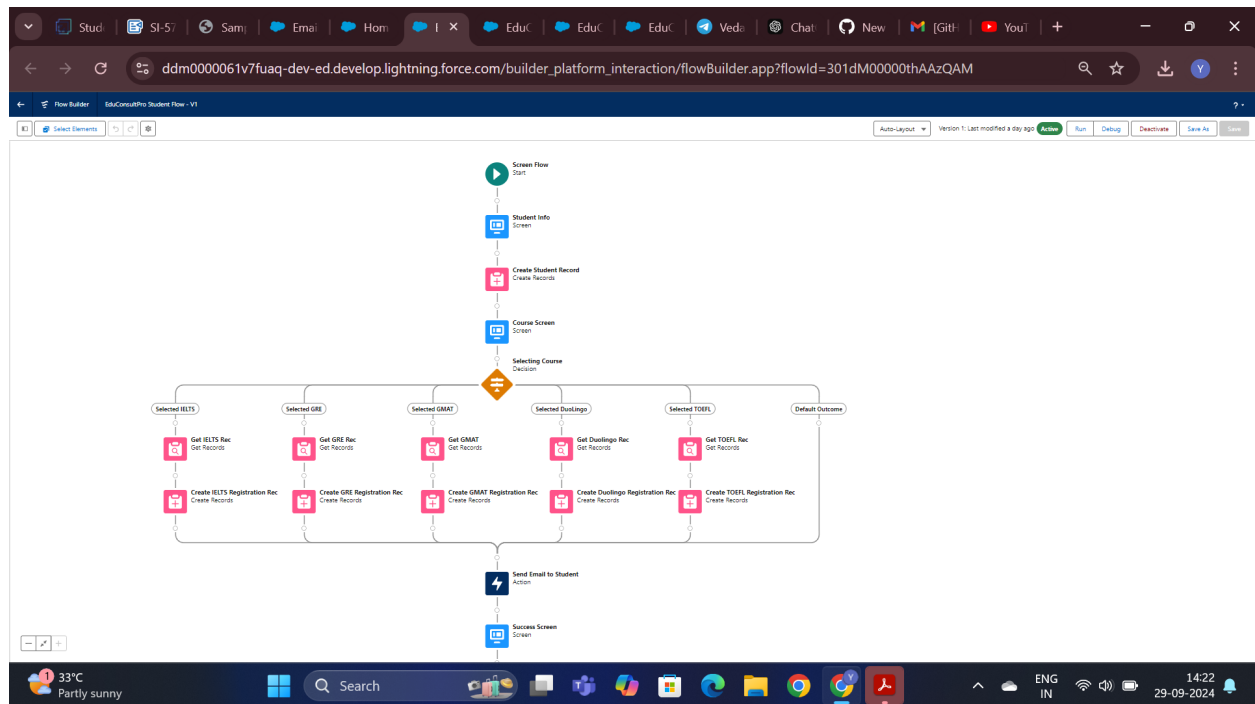
Search

ENG IN

14:04 29-09-2024

Task 2:

Create a ScreenFlow for Student Admission Application process.



Task 3:

Create Users

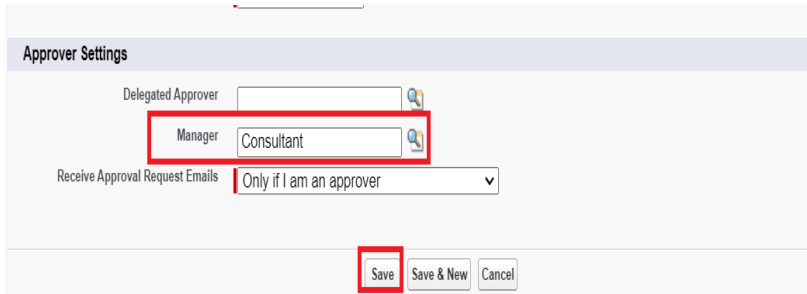
Create a user with a Standard platform user profile.

User

1. Go to Setup --> Administration --> Users --> New User
2. LastName : Consultant
3. License : Salesforce Platform
4. Profile : Standard Platform User
5. Fill all the mandatory fields & Save.

Configure the User Settings

1. Go to Setup --> Administration --> Users --> click Edit next to your name
2. Scroll down to the bottom, under Approver Settings, Select "Consultant" the Manager Field.
3. Click Save.



The screenshot shows the 'Approver Settings' section of a Salesforce user profile. It includes fields for 'Delegated Approver', 'Manager' (set to 'Consultant'), and 'Receive Approval Request Emails' (set to 'Only if I am an approver'). The 'Manager' field and the 'Save' button at the bottom are highlighted with red boxes.

Task 4:

Create an Approval Process for Property Object

The screenshot displays the Salesforce Lightning interface for managing Email Templates. The browser address bar shows the URL: `ddm0000061v7fuaq-dev-ed.develop.lightning.force.com/lightning/o/EmailTemplate/home`. The Salesforce navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, and a selected tab for "Approval Template".

The main content area is titled "Email Templates" and shows a "Recent" view with 3 items. A search bar and buttons for "New Email Template" and "New Folder" are present. The table below lists the recent email templates:

EMAIL TEMPLATES	Email Template Name	Description	Folder	Last Modified By	Last Modified Date
Recent	Approval Template		Appointment Templates	Snehitha Yajali	29/9/2024, 10:21 am
Created by Me	Rejection Template		Appointment Templates	Snehitha Yajali	29/9/2024, 10:25 am
Private Email Templates	Submission Template		Appointment Templates	Snehitha Yajali	29/9/2024, 10:22 am
Public Email Templates					
All Email Templates					

The left sidebar shows navigation options for "EMAIL TEMPLATES" (Recent, Created by Me, Private Email Templates, Public Email Templates, All Email Templates) and "FOLDERS" (All Folders, Created by Me, Shared with Me).

The Windows taskbar at the bottom shows the system clock as 14:13 on 29-09-2024, with the language set to ENG IN.

Task 5:

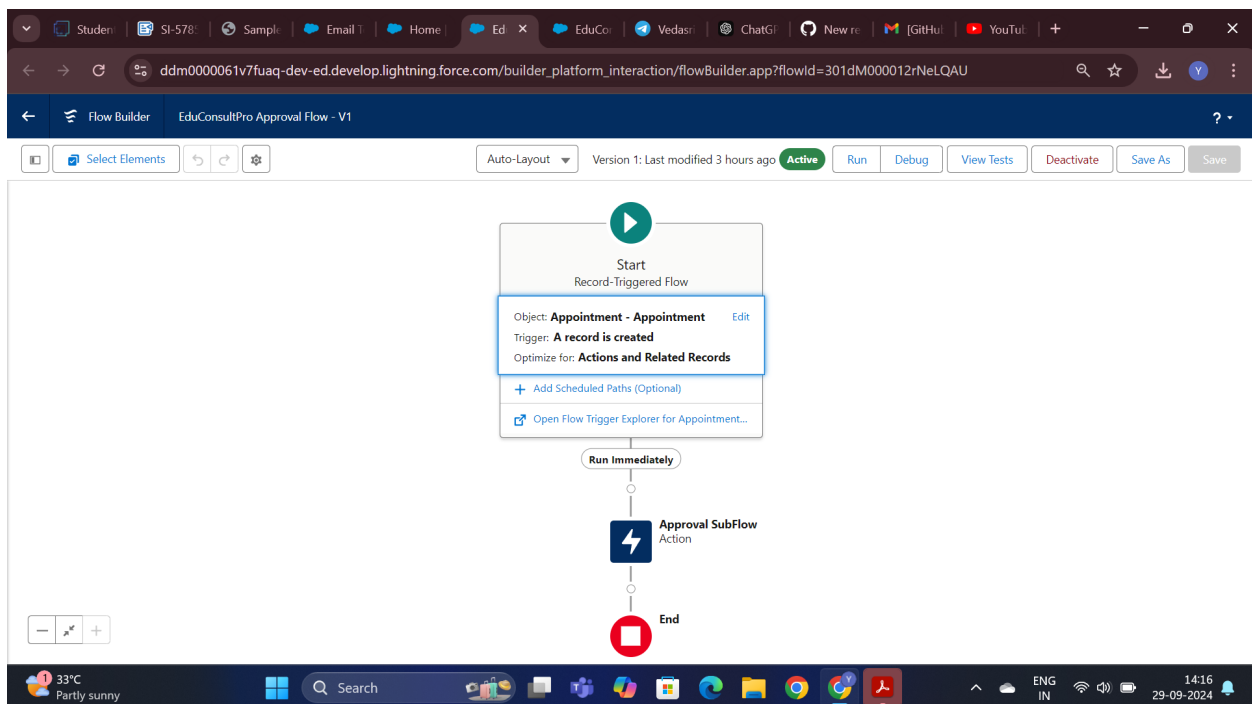
Create a Record Triggered Flow

Configure the Start Element

1. From Setup, enter Flows in the Quick Find box, then select Flows.
2. Click New Flow.
3. Select Record-Triggered Flow.
4. Click Create. The Configure Start window opens.
5. For Object, select Appointment.
6. For Trigger the Flow When, select A record is created.

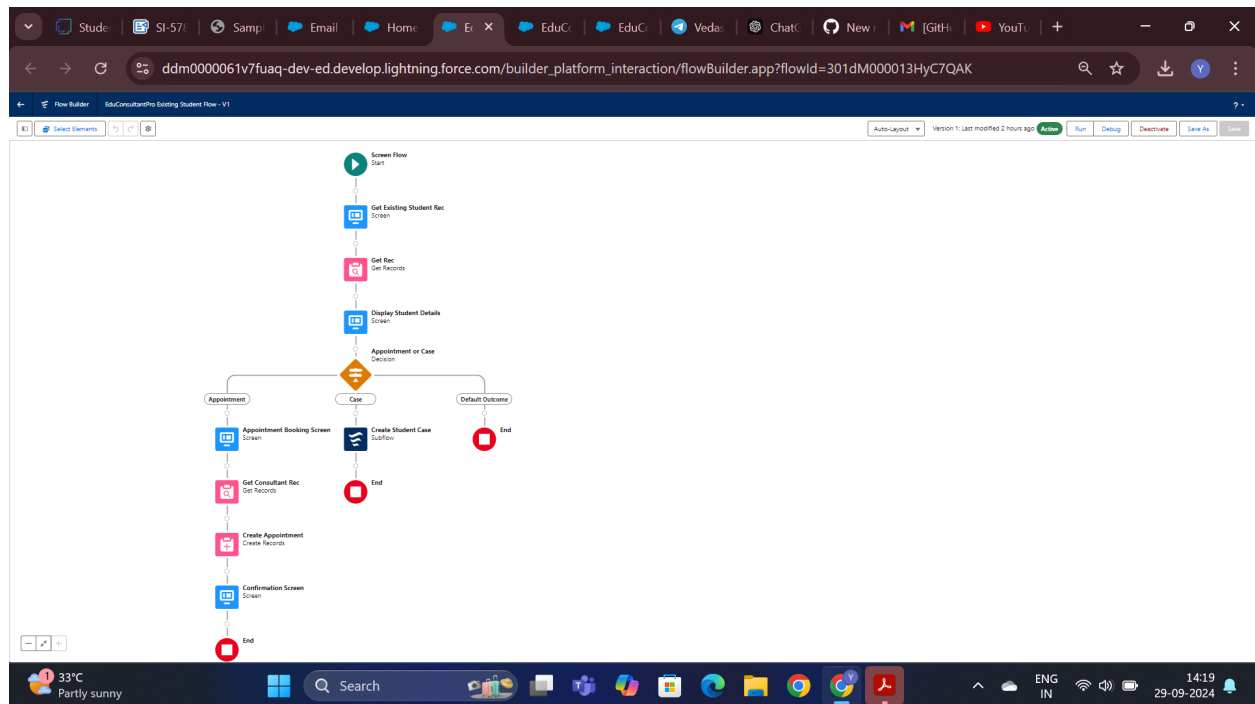
Add an Action Element

1. Add an Action element after the Start Element and Select the Submit for approval action, label it as “Approval SubFlow”.
2. Set the RecordId to “{!\$Record.Id}”.



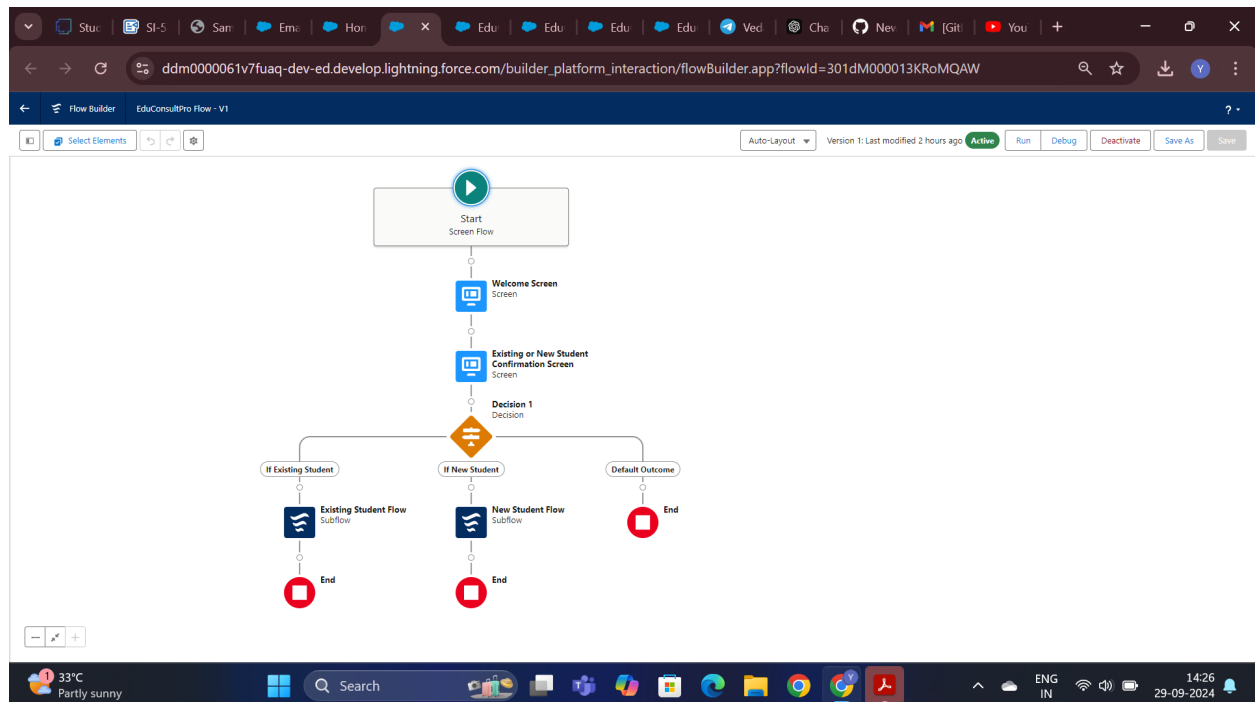
Task 6:

Create a ScreenFlow for Existing Student to Book an Appointment



Task 7:

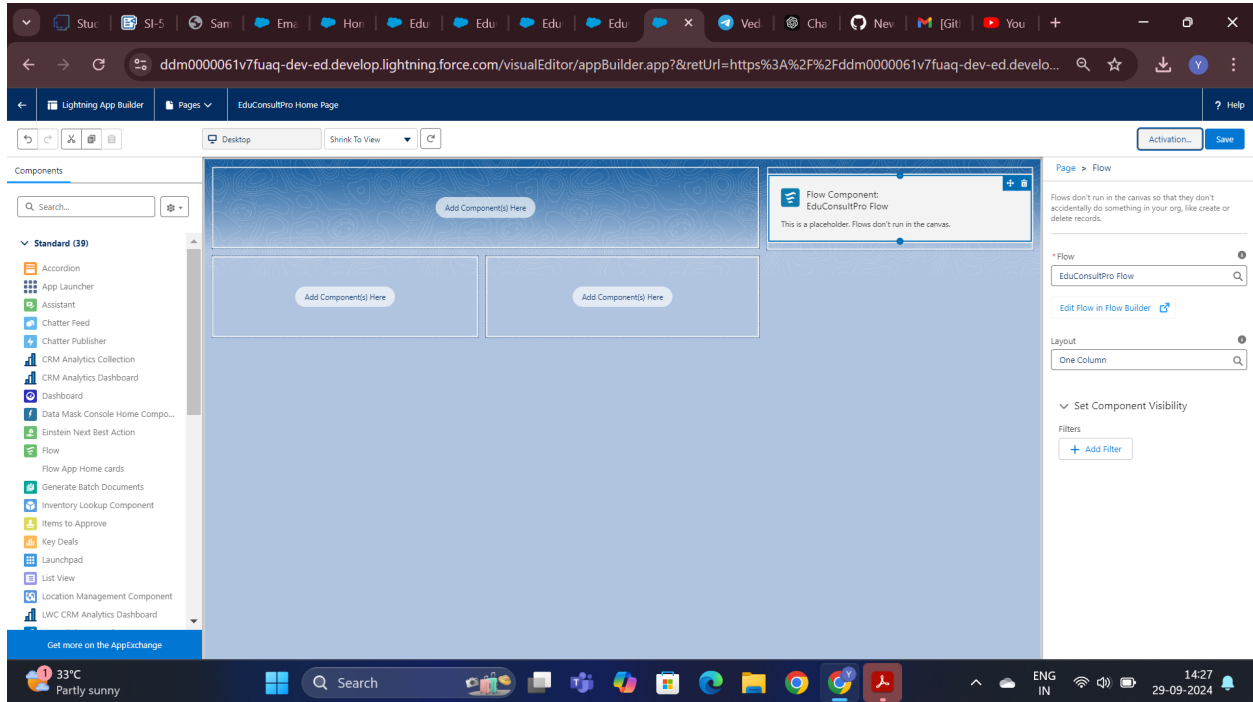
Create a ScreenFlow to Combine all the flows at one place



Task 8:

Create a lightning app page

Create a lightning app page and make it available at the application



THANK YOU