

SALESFORCE VIRTUAL INTERNSHIP

SmartInternz

A CRM Application to Manage the Services offered by an Institution

By

NAME: Prathamesh Mangesh Sonawane

EMAIL: sonawanepрathamesh2003@gmail.com

Project Abstract:

This project focuses on developing a CRM (Customer Relationship Management) application for EduConsultPro Institute, an educational institution offering a range of programs. The aim is to streamline and enhance the student admission process by implementing a Salesforce CRM solution. The CRM system will manage various stages of the admission process, from handling student inquiries to processing applications and scheduling appointments. By automating key workflows such as user management, application approval processes, and case management, the system will provide a seamless experience for both prospective students and admissions staff.

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INTRODUCTION

A CRM Application to Manage the Services offered by an Institution

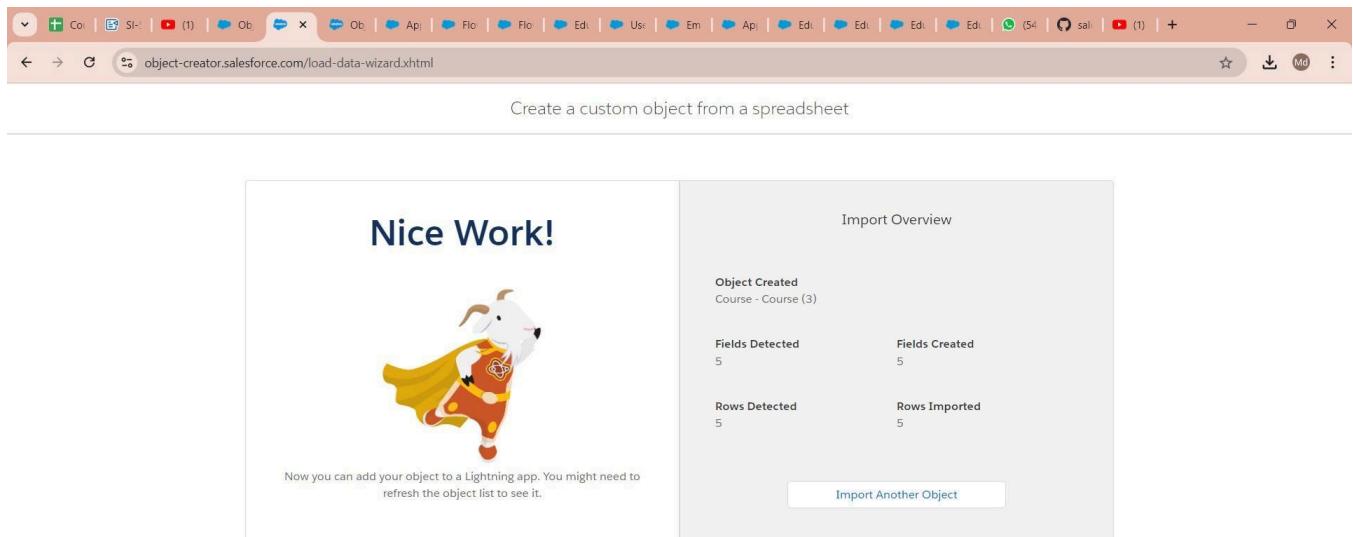
EduConsultPro Institute is a leading educational institution offering a variety of courses and programs in diverse fields. With a growing number of prospective students seeking admission each year, the institute faces challenges in managing the admission process, student enquiries, and expert consulting 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 efficiently review and process admission applications, student enquiries, and case management.

ACTIVITY 1: Create Objects From Spreadsheet

Directly Creating Objects from a Spreadsheet in Salesforce

Create Course object

1. Go to your object manager and click on create object from spreadsheet
2. Click on the link to get the spreadsheet,_Course.
3. After downloading, upload the file, map the fields, and upload to create an object.



4. [Redacted]

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](#)

Salesforce interface showing the "Create a custom object from a spreadsheet" wizard.

The main message is "Nice Work!" with a superhero dog icon.

Import Overview:

| Object Created | Fields Detected | Fields Created | Rows Detected | Rows Imported |
|-----------------------------|-----------------|----------------|---------------|---------------|
| Consultant - Consultant (1) | 6 | 6 | 3 | 3 |

Buttons: Import Another Object



The screenshot shows a browser window for the Salesforce Object Creator at object-creator.salesforce.com/load-data-wizard.xhtml. The main message is "Create a custom object from a spreadsheet". On the left, a "Nice Work!" section features a cartoon dog superhero icon. Below it, text says: "Now you can add your object to a Lightning app. You might need to refresh the object list to see it." On the right, an "Import Overview" section displays the following data:

| Object Created | |
|-------------------------------|----------------|
| Appointment - Appointment (1) | |
| Fields Detected | Fields Created |
| 5 | 5 |
| Rows Detected | Rows Imported |
| 0 | 0 |

[Import Another Object](#)



Create Relationship among the objects

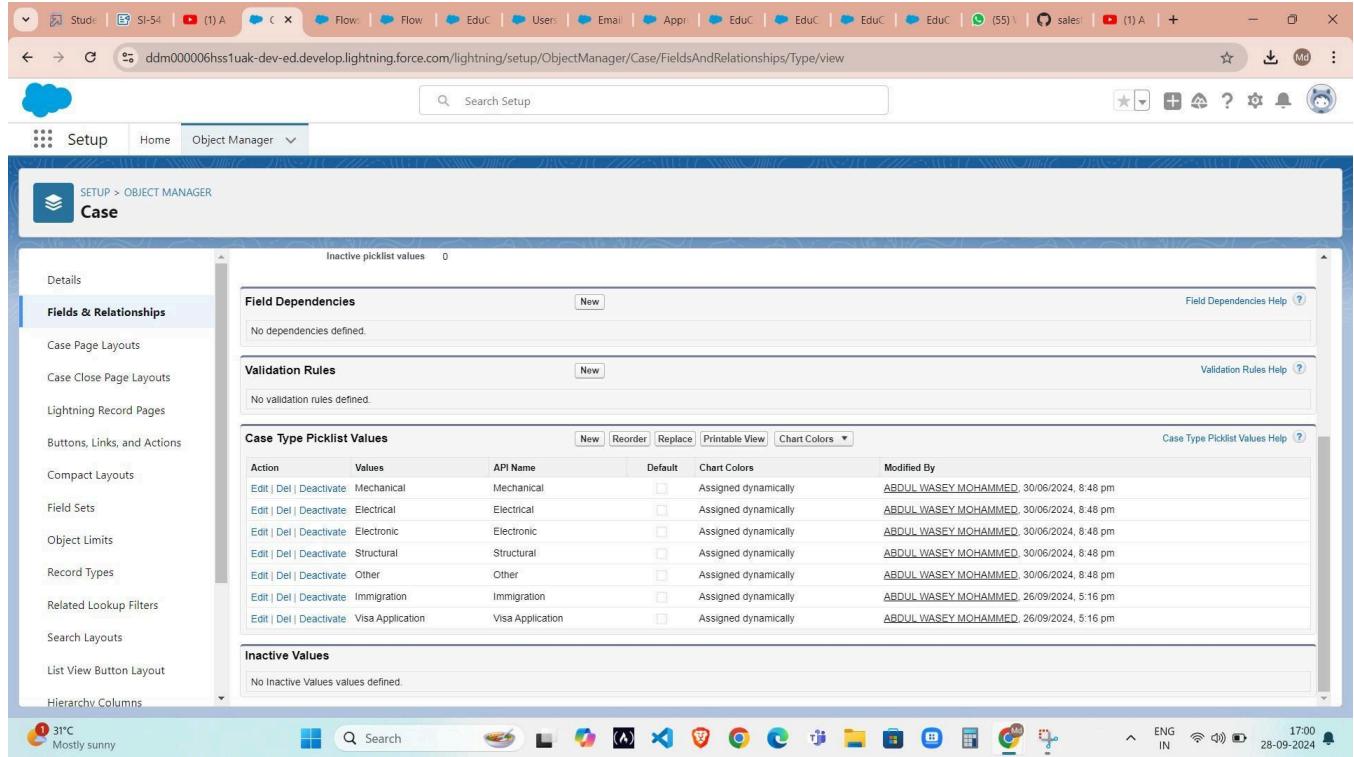
1. Create a lookup between appointment and student, appointment and consultant.
2. Create an object to store the information student and course details with the name Registration.
3. Also create a lookup between student and case to store the student queries for immigration or visa application.
4. The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

Configure the Case Object

1. Go to the object manager, edit case object.

2. Select the "Type" field and add the values in it. Immigration

Visa Application



The screenshot shows the Salesforce Setup interface for the Case object. The left sidebar lists various configuration tabs: Details, Fields & Relationships (selected), 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, and Hierarchv Columns. The main content area displays the 'Case Type Picklist Values' section. It includes tabs for 'New', 'Reorder', 'Replace', 'Printable View', and 'Chart Colors'. A table lists the values:

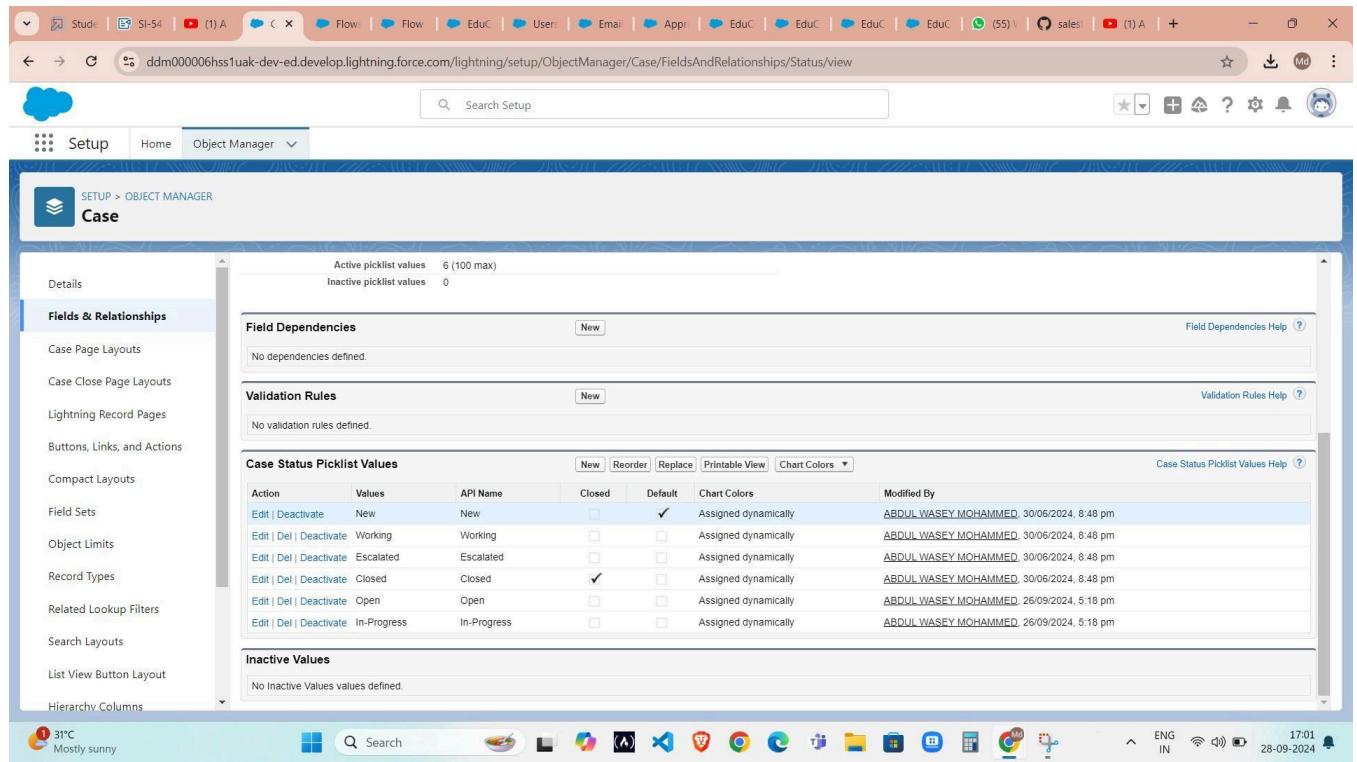
| Action | Values | API Name | Default | Chart Colors | Modified By | Modified Date |
|-------------------------|------------------|------------------|--------------------------|----------------------|----------------------|---------------------|
| Edit Del Deactivate | Mechanical | Mechanical | <input type="checkbox"/> | Assigned dynamically | ABDUL WASEY MOHAMMED | 30/06/2024, 8:48 pm |
| Edit Del Deactivate | Electrical | Electrical | <input type="checkbox"/> | Assigned dynamically | ABDUL WASEY MOHAMMED | 30/06/2024, 8:48 pm |
| Edit Del Deactivate | Electronic | Electronic | <input type="checkbox"/> | Assigned dynamically | ABDUL WASEY MOHAMMED | 30/06/2024, 8:48 pm |
| Edit Del Deactivate | Structural | Structural | <input type="checkbox"/> | Assigned dynamically | ABDUL WASEY MOHAMMED | 30/06/2024, 8:48 pm |
| Edit Del Deactivate | Other | Other | <input type="checkbox"/> | Assigned dynamically | ABDUL WASEY MOHAMMED | 30/06/2024, 8:48 pm |
| Edit Del Deactivate | Immigration | Immigration | <input type="checkbox"/> | Assigned dynamically | ABDUL WASEY MOHAMMED | 26/09/2024, 5:16 pm |
| Edit Del Deactivate | Visa Application | Visa Application | <input type="checkbox"/> | Assigned dynamically | ABDUL WASEY MOHAMMED | 26/09/2024, 5:16 pm |

3.

4. Now Select the "Status" field and add the values in it.

Open

In-progress



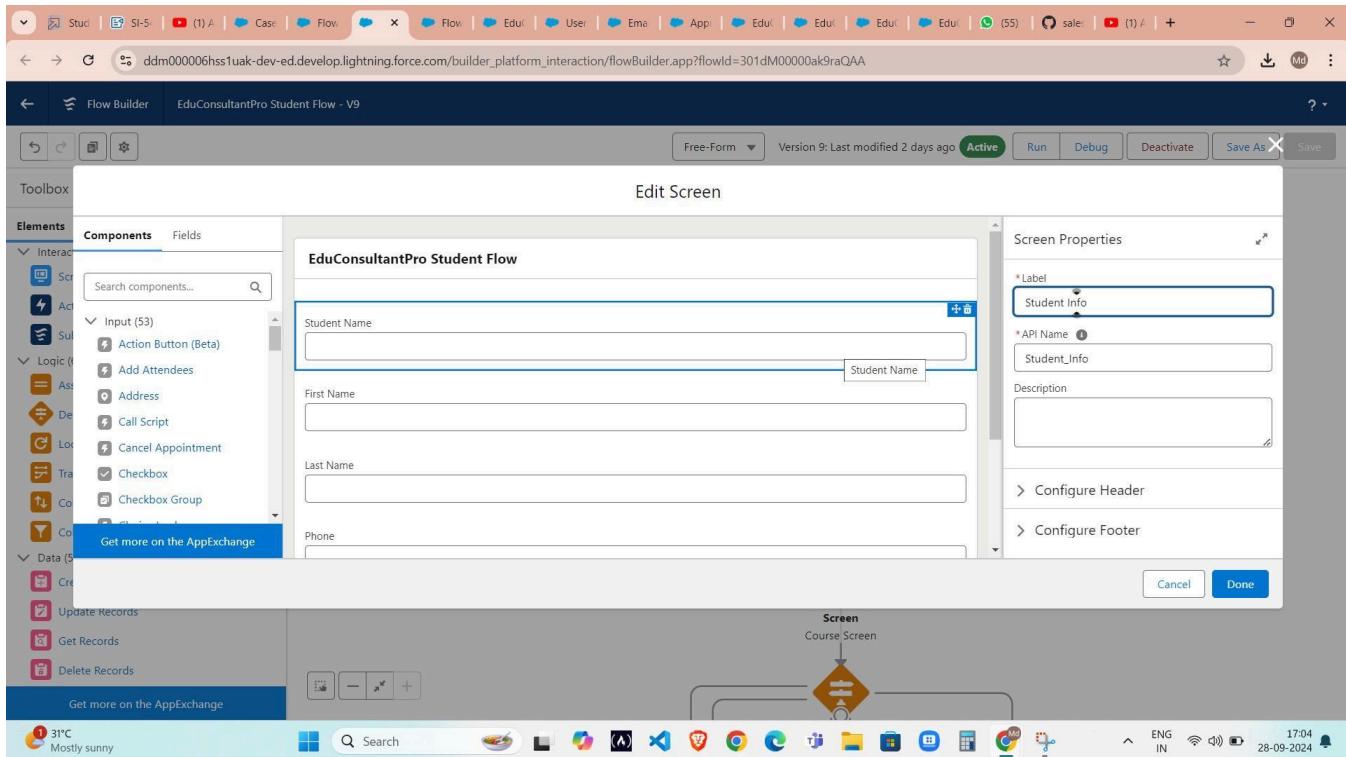
5.

ACTIVITY 2: Create a ScreenFlow for Student Admission Application process.

Add Screen Element

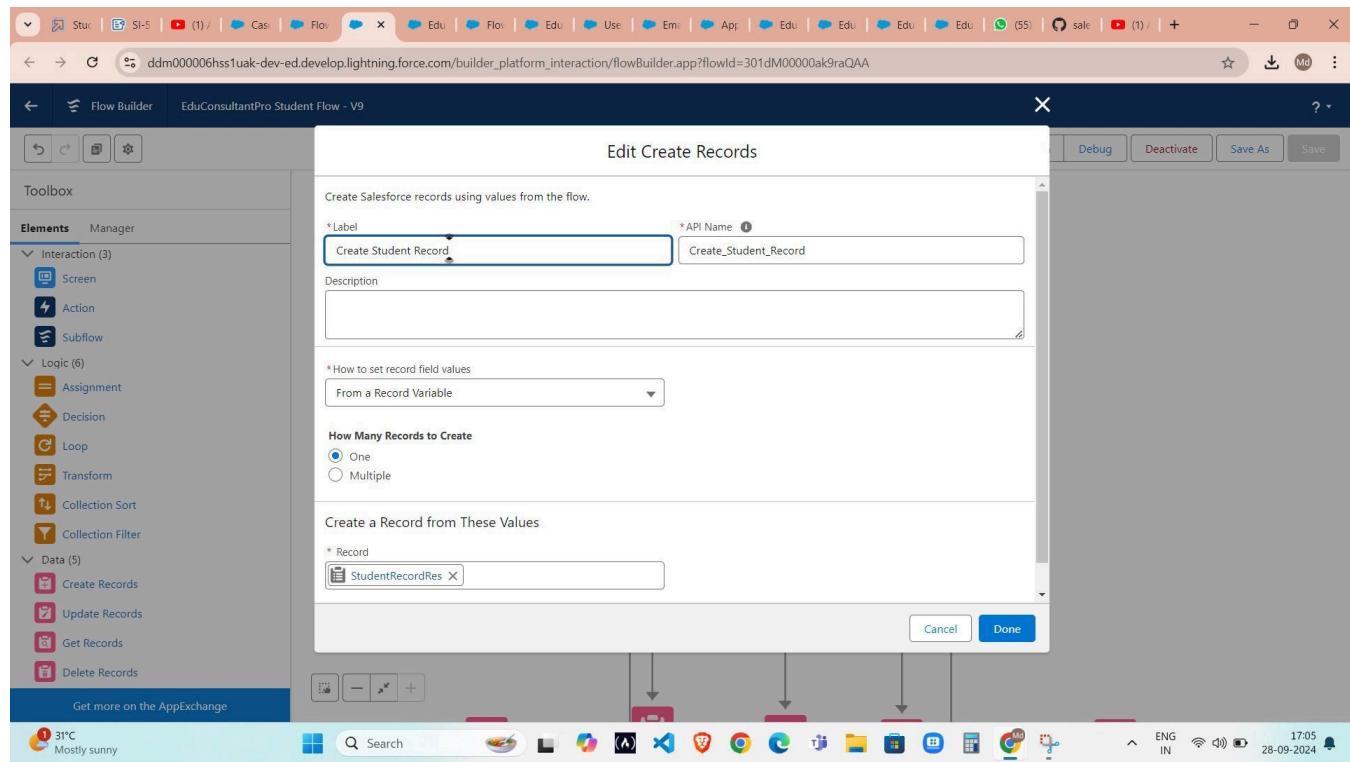
- From Setup, enter Flow Builder in quick find, select new flow --> ScreenFlow.
- Add a Screen element.
- In the Screen Properties pane, for Label, enter "Student Info".
- Click on Fields, click on the record variable input and create a new Resource(StudentRecordRes) to display all the fields which are in the student object.

Drag all the fields which are needed to add on the screen in order to collect the student information.



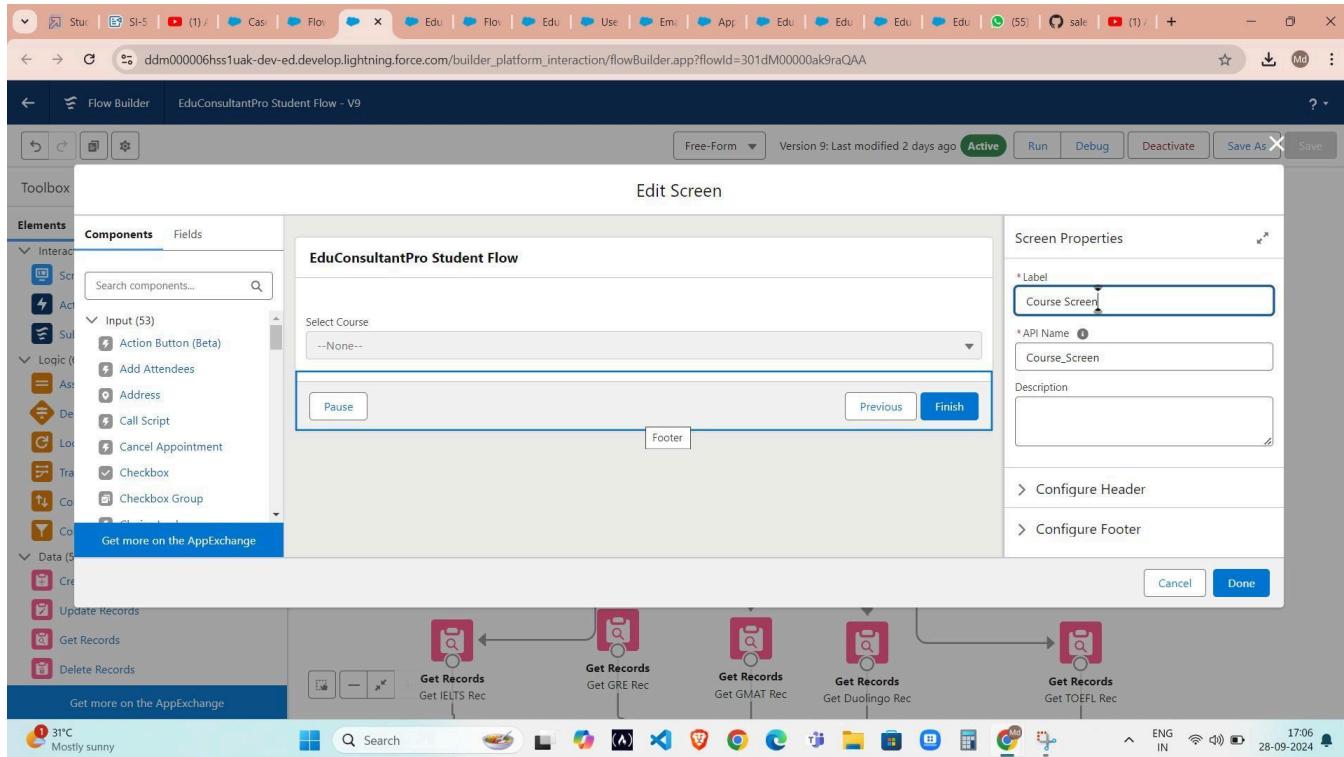
Create Student Record using Create Element

1. Add a Create element after Student Info Screen Element, Label it as "Create Student Record."
2. Select "one" under How many records to Create, and select "use all values from a record" under How to Set the record fields.
3. Select the record variable resource(StudentRecordRes) which we have created in the Student Info screen element, under Create a record from these values.



Add Screen Element

1. Add a Screen Element after Create Student Record Element and label it as Course Screen.
2. Add a picklist component from the left side panel label it as "Select Course", under choices type "IELTS" and enter. This creates a variable with the name IELTS.
3. Repeat the same for GRE, GMAT, Duo lingo, TOEFL.

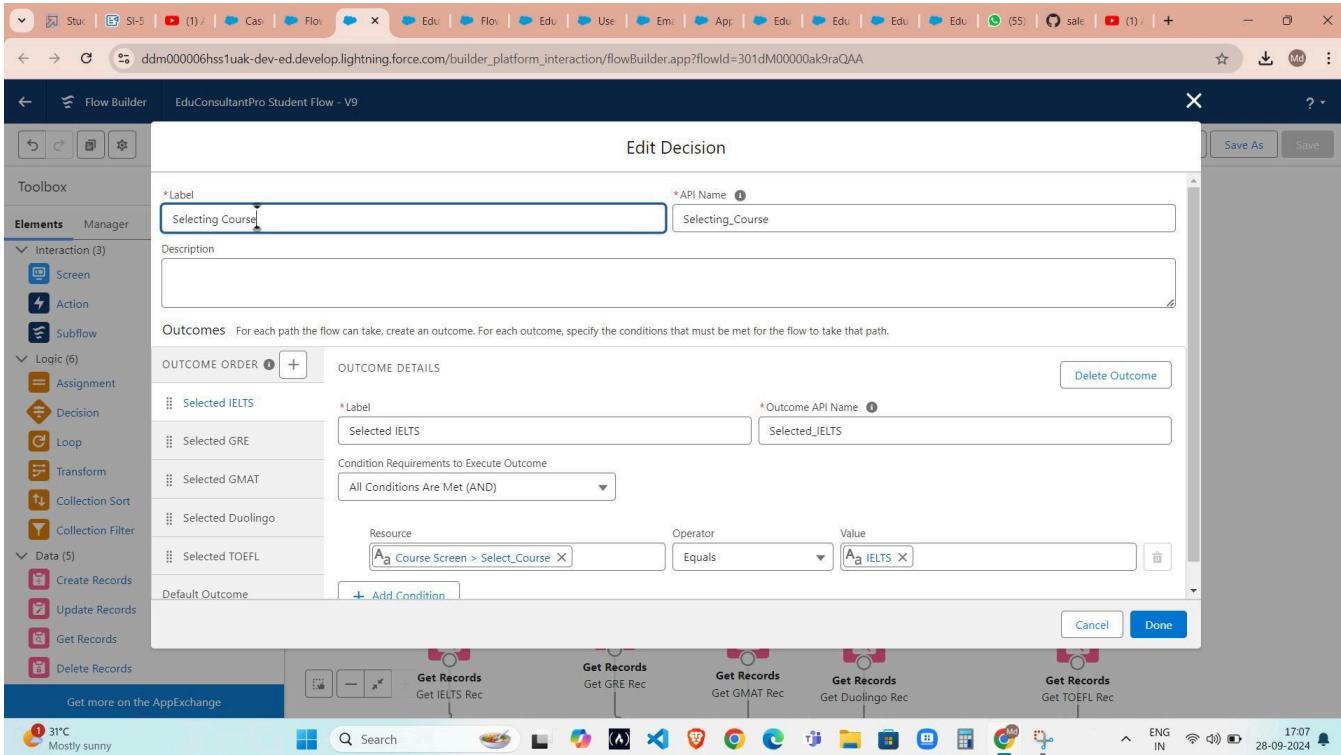


Add Decision Element

1. Add a Decision Element after the Select Course Screen Element; label it as Selecting Course.
2. Under outcome label it as "Selected IELTS" and write the condition such as below: Resource : Select_Course (Screen Component from Select Course Screen Element) Operator : Equals Value : IELTS (Choice Variable from Select Course Screen Element)
3. Click on the "+" icon and Repeat step 2 for other options mentioned as below:
 1. GRE
 2. GMAT
 3. DuoLingo

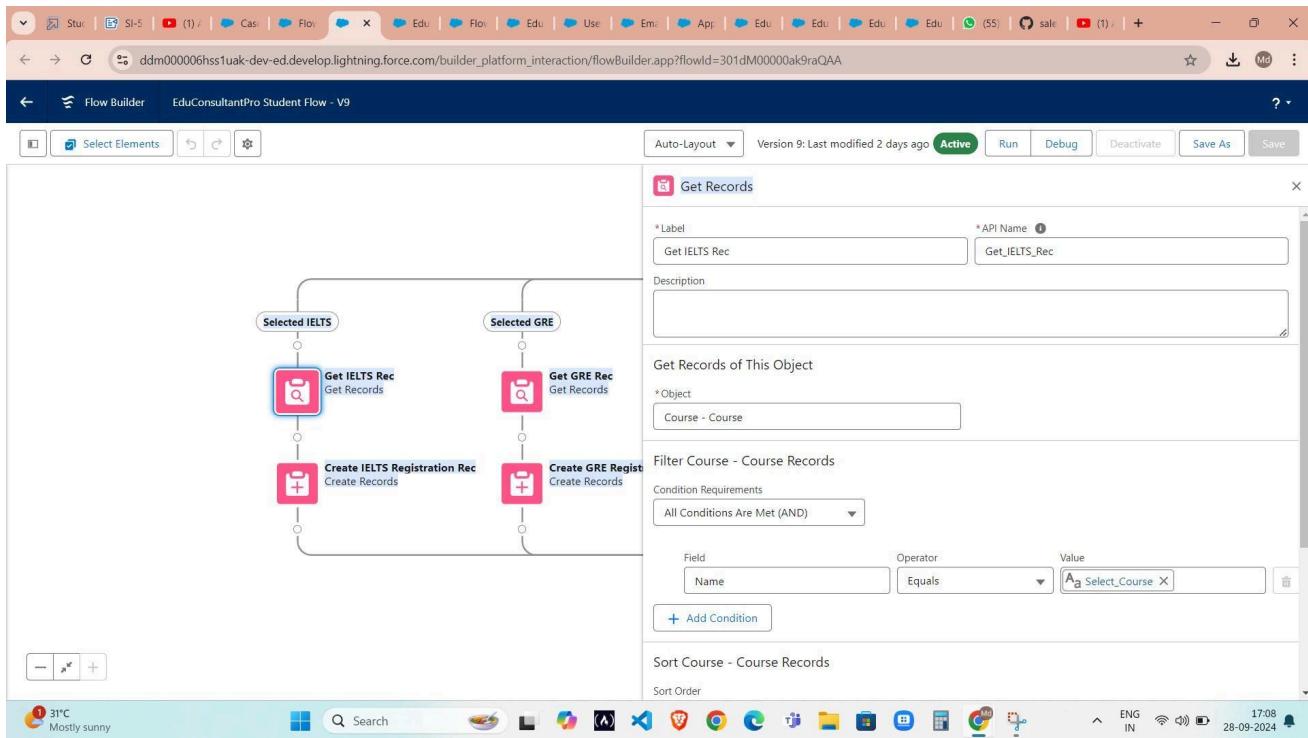
4. TOEFL

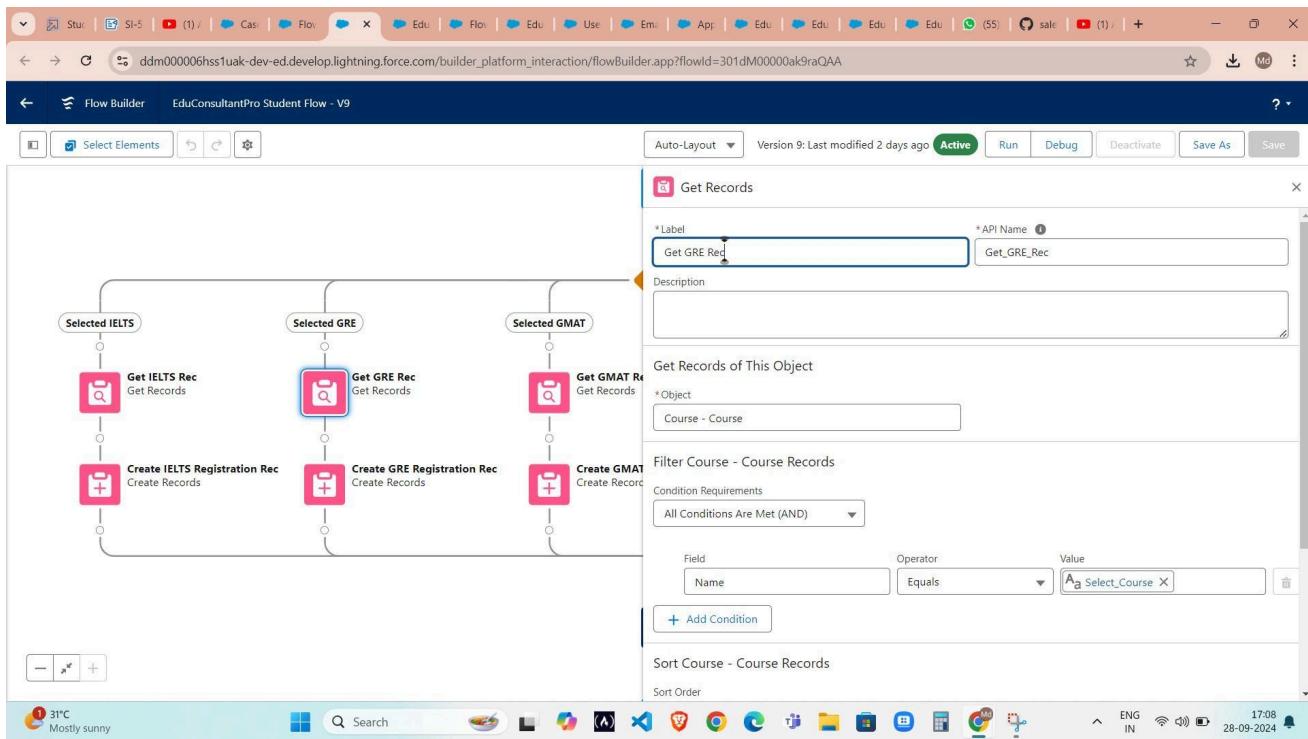
4. Click Done.

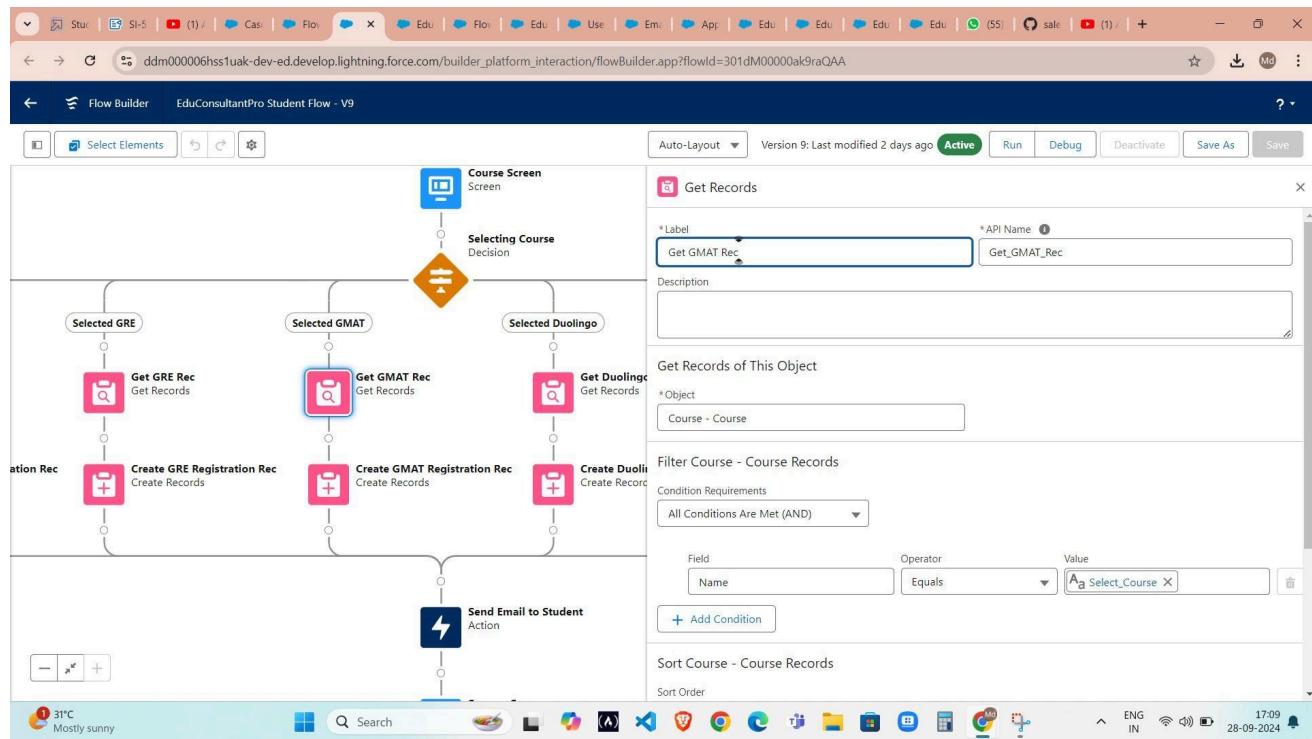


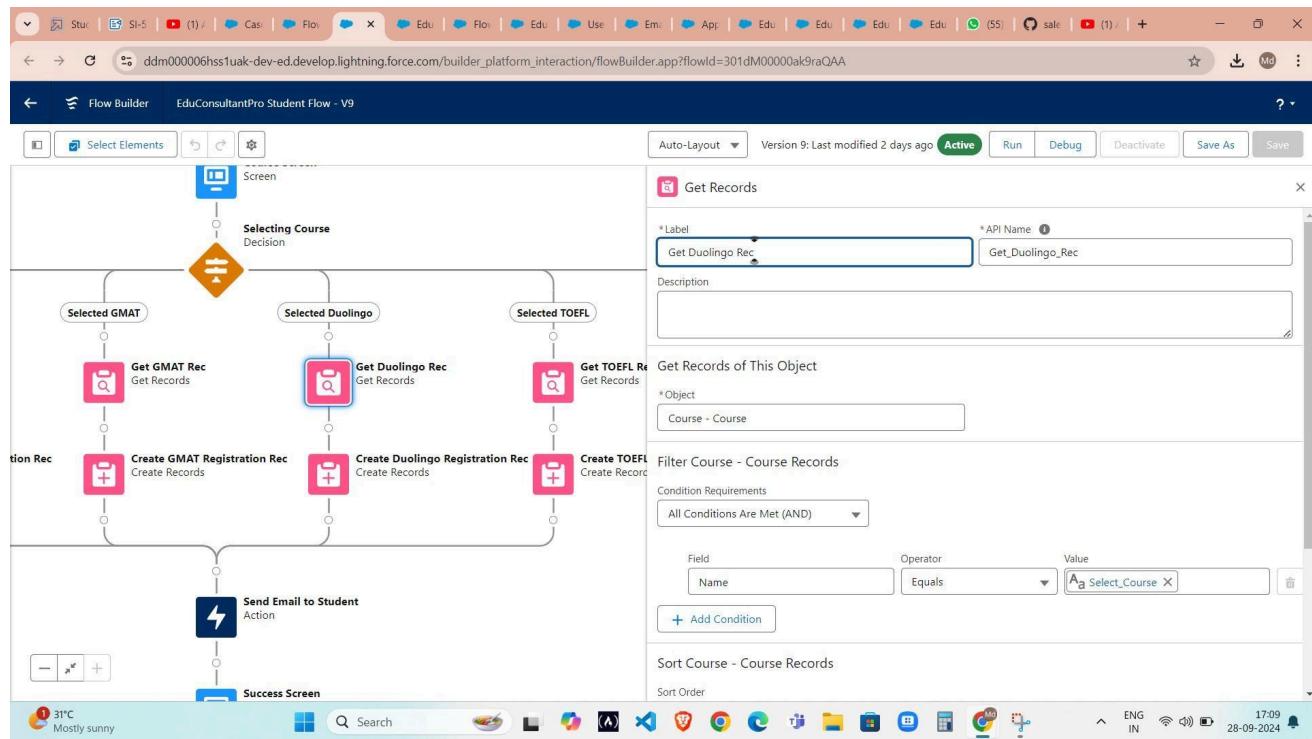
Add GET Record Element

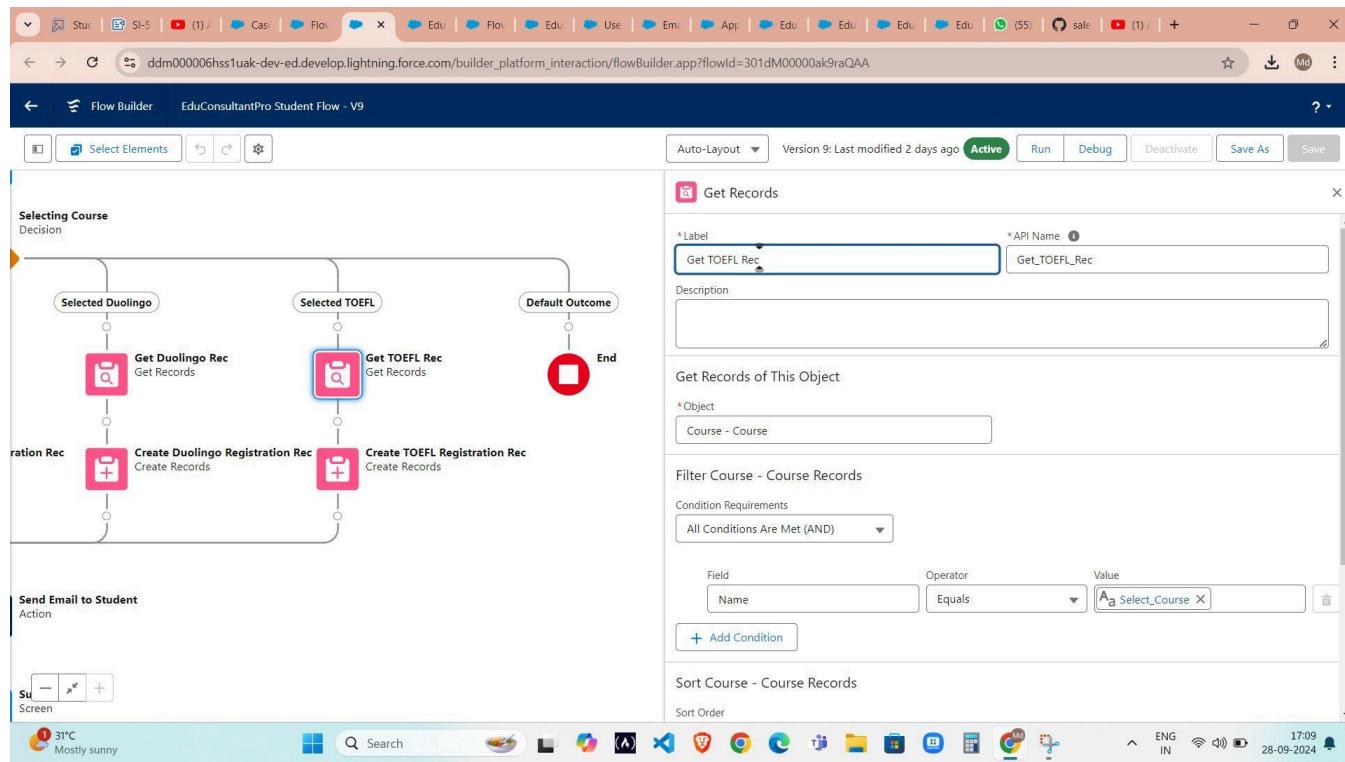
1. Add a GET Record Element after Decision Element, under the IELTS path and label it as "Get IELTS Rec".
2. Select Object : Course
Condition Requirement : All Conditions are Met(AND)
 1. Field : Course Name
Operator : Equals
Value :
{!Select_Course}
3. Repeat the steps 1 & 2 for the GRE, GMAT, TOEFL, DuoLingo paths.







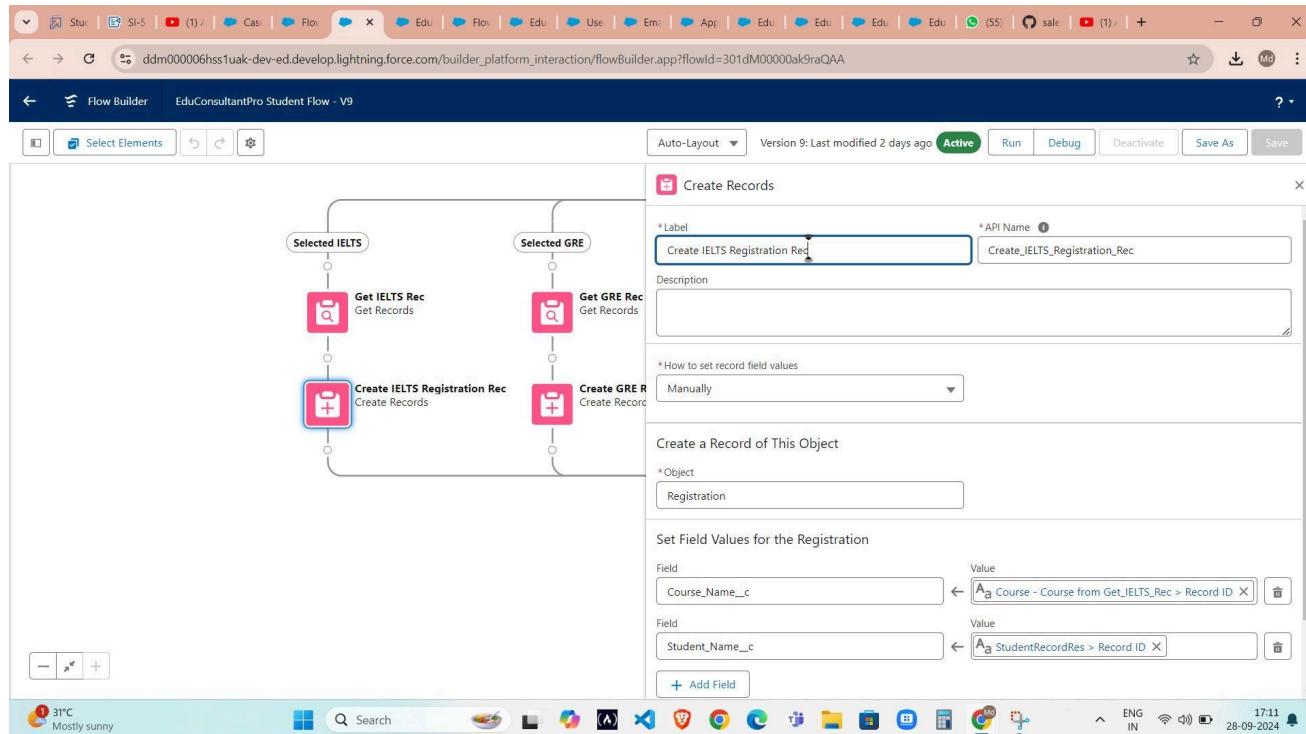


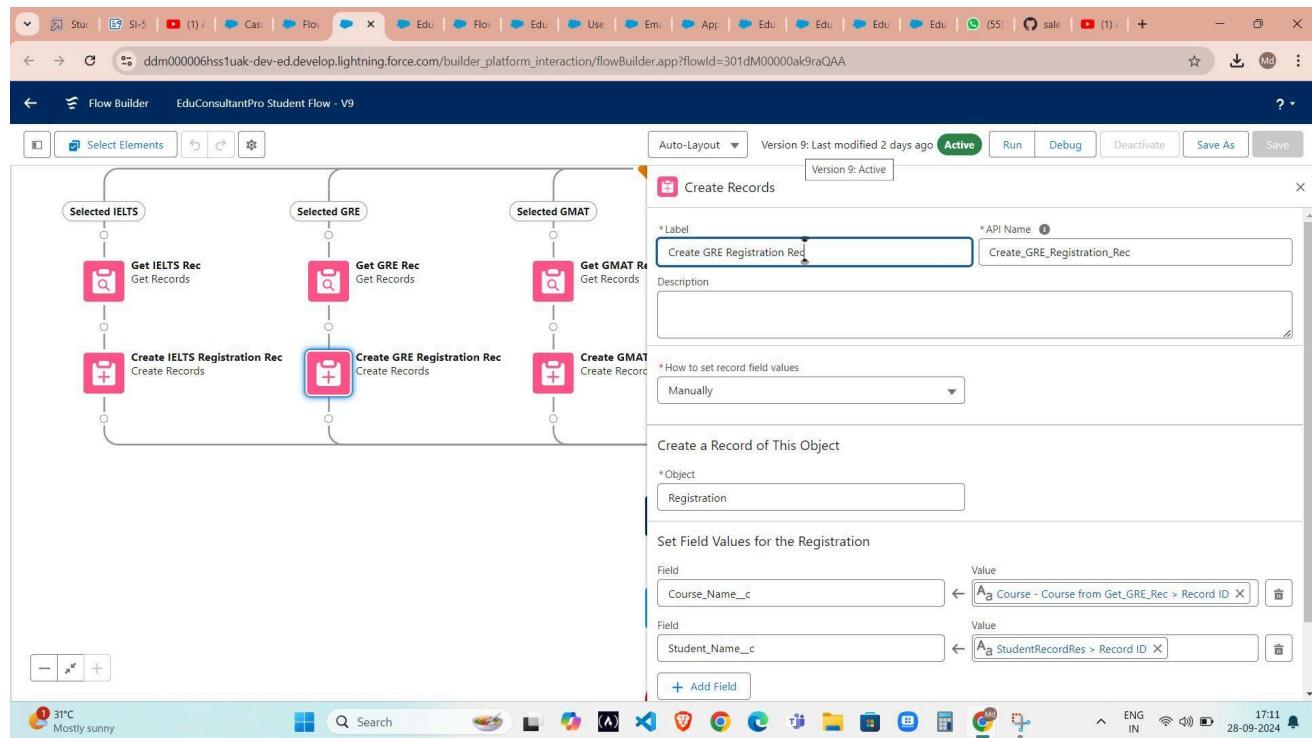


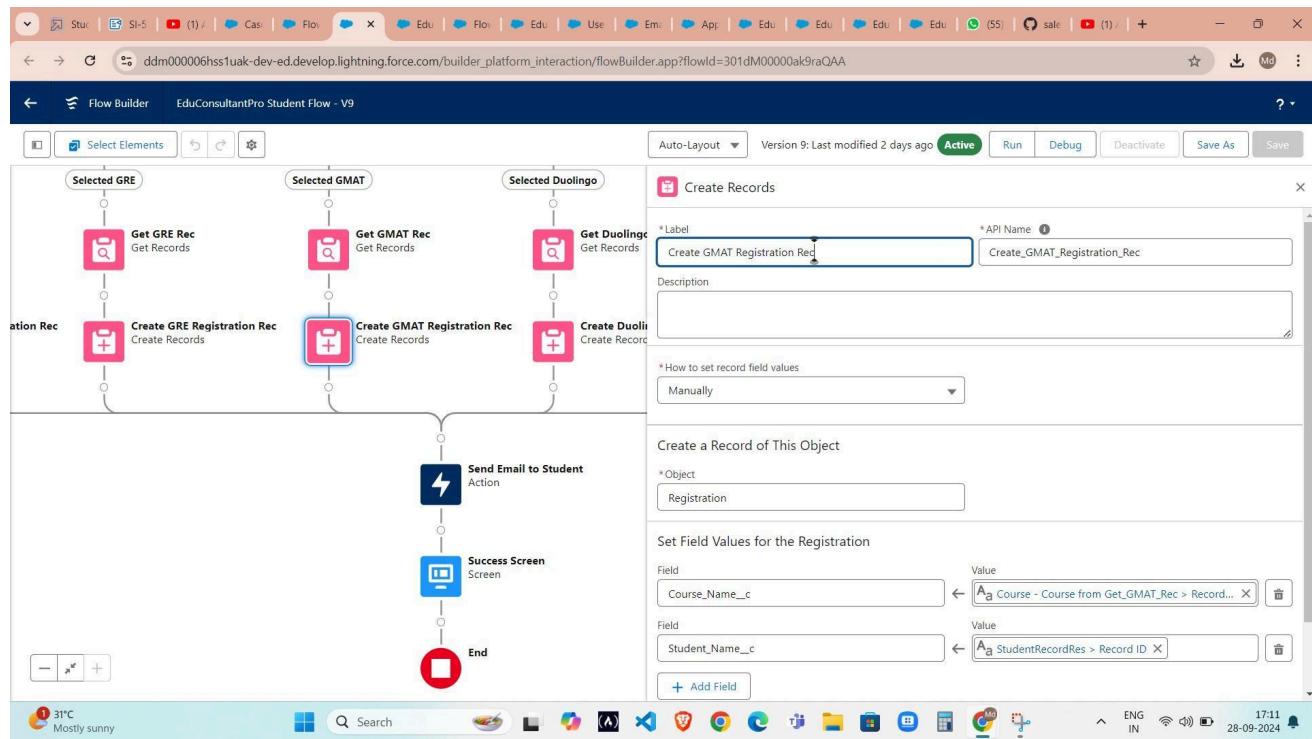
Create Registration Record using Create Records Element

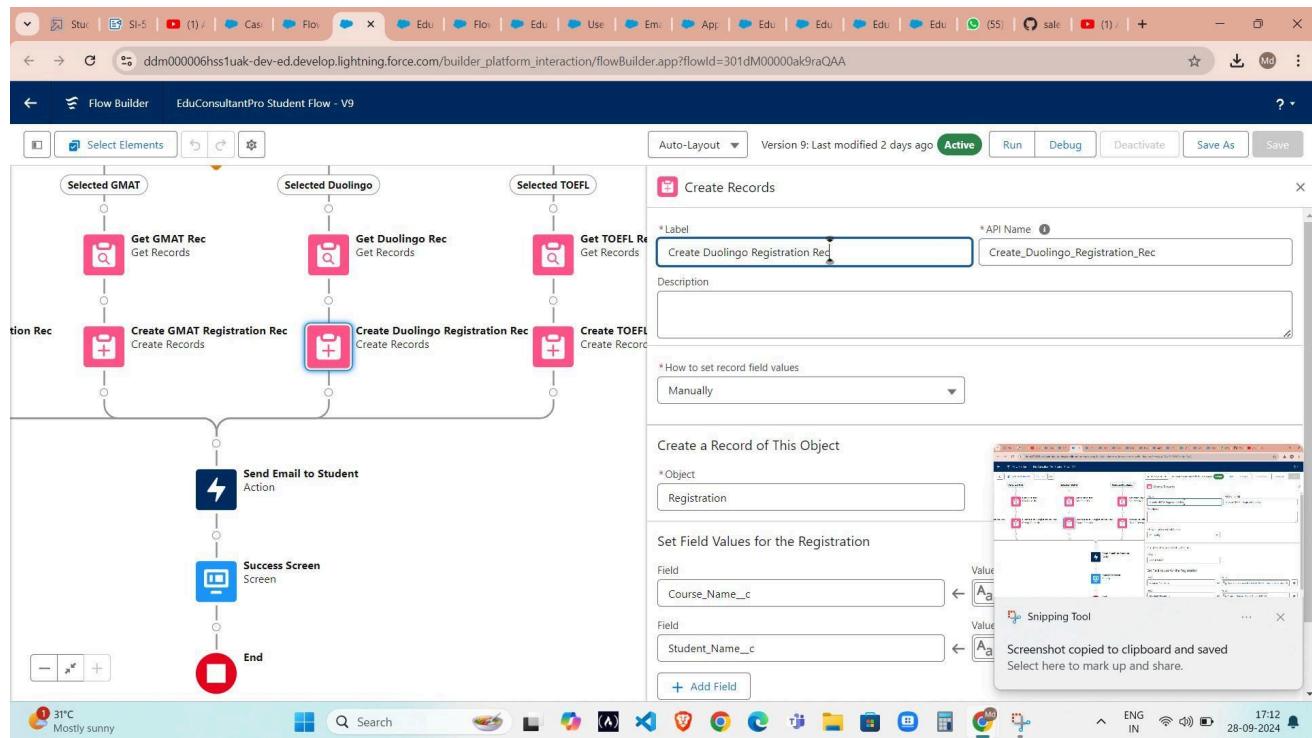
1. Add a Create element after the Get IELTS Rec element and label it as "Create IELTS Registration Rec".
2. Select "one" under How many records to Create, and select "Use separate resources and literal values" under How to Set the record fields.
3. Select Object : Registration
 1. Field : Course_Name_c
Value :
{!GetIELTSSRec.Id}
 2. Field : Student_Name_c
Value :
{!StudentRecordRes.Id}

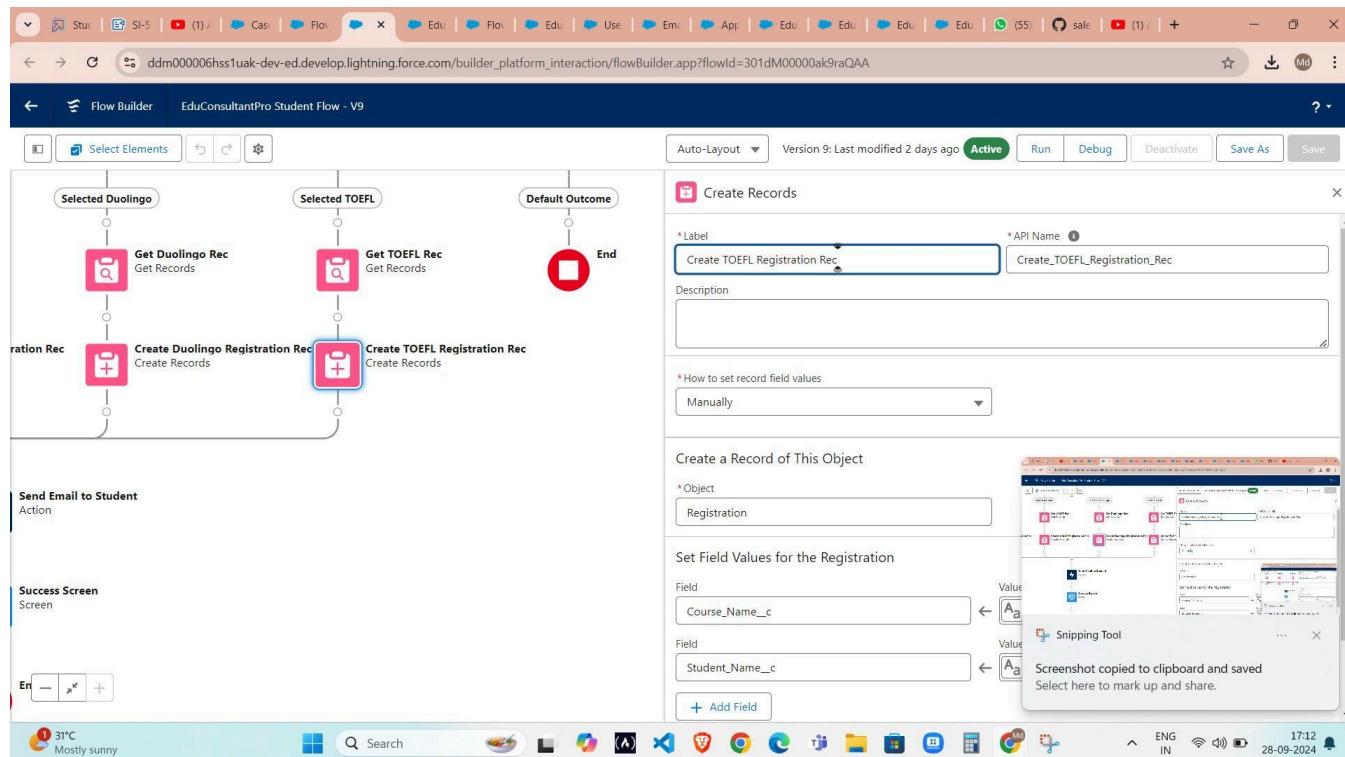
4. Repeat the steps 1 & 2 for the GRE, GMAT, TOEFL, DuoLingo paths.











Create Email Text Template Variables for email body and subject

1. Click on the toggle toolbox on the left corner, click "New Resource", then select "Text Template" as Resource Type.
2. Give the API name as "StuRegistrationEmailTextTempBody", select "view as plain text" and paste the below text in body.

"Dear {!StudentRecordRes.Name},

Congratulations and welcome to EduConsultantPro!

We are delighted to inform you that your registration on our platform has been successfully completed. You are now part of our esteemed community dedicated to empowering students like you to achieve their educational and immigration aspirations.

At EduConsultantPro, we understand the importance of your academic and career goals, and we are committed to providing you with the highest level of support and guidance throughout your journey.

Here are a few key points to help you get started:

Explore Our Resources : Take some time to explore the wide range of resources, tools, and services available on the EduConsultantPro platform. From educational insights to immigration advice, we offer comprehensive support tailored to your needs.

Connect with Our Consultants : Our team of experienced consultants is here to assist you at every stage of your educational and immigration endeavors. Don't hesitate to reach out to us with any questions, concerns, or inquiries you may have. We're here to help!

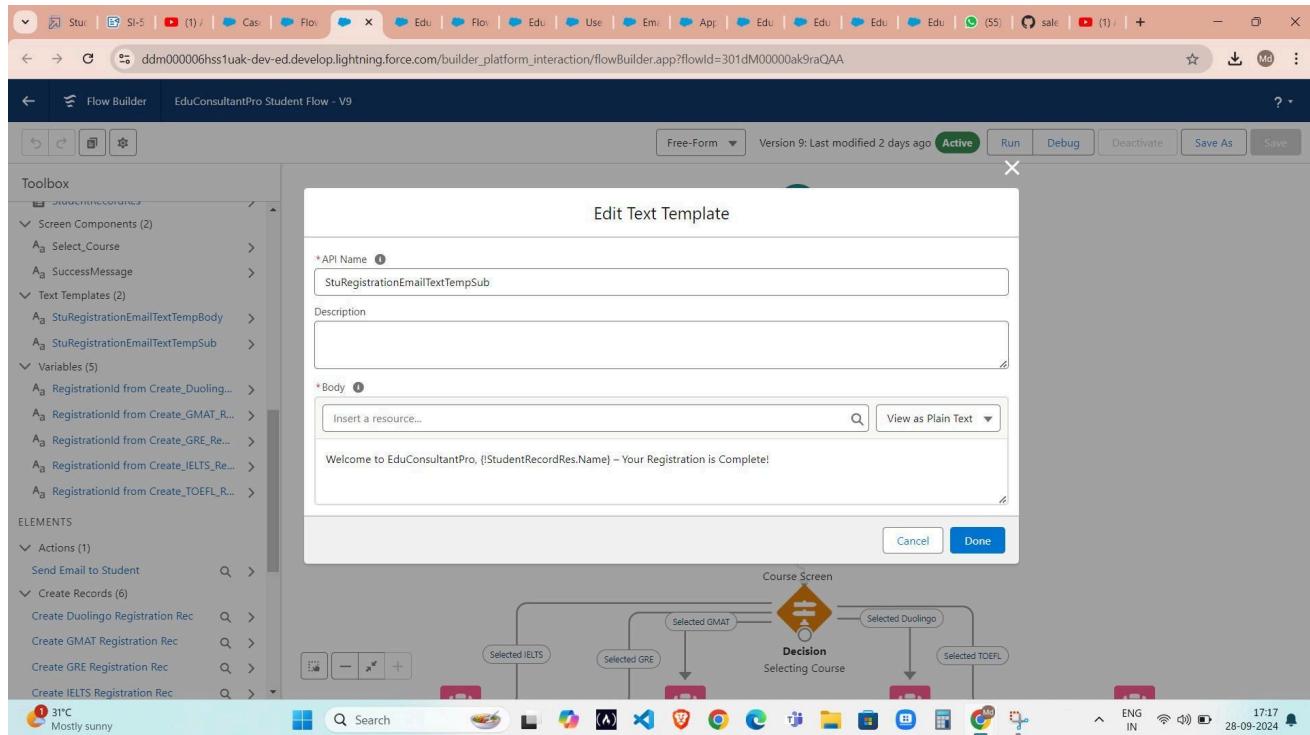
Stay Updated : Keep an eye on your inbox for important updates, announcements, and exclusive opportunities from EduConsultantPro. We'll ensure that you're informed about the latest developments and relevant information to support your journey.

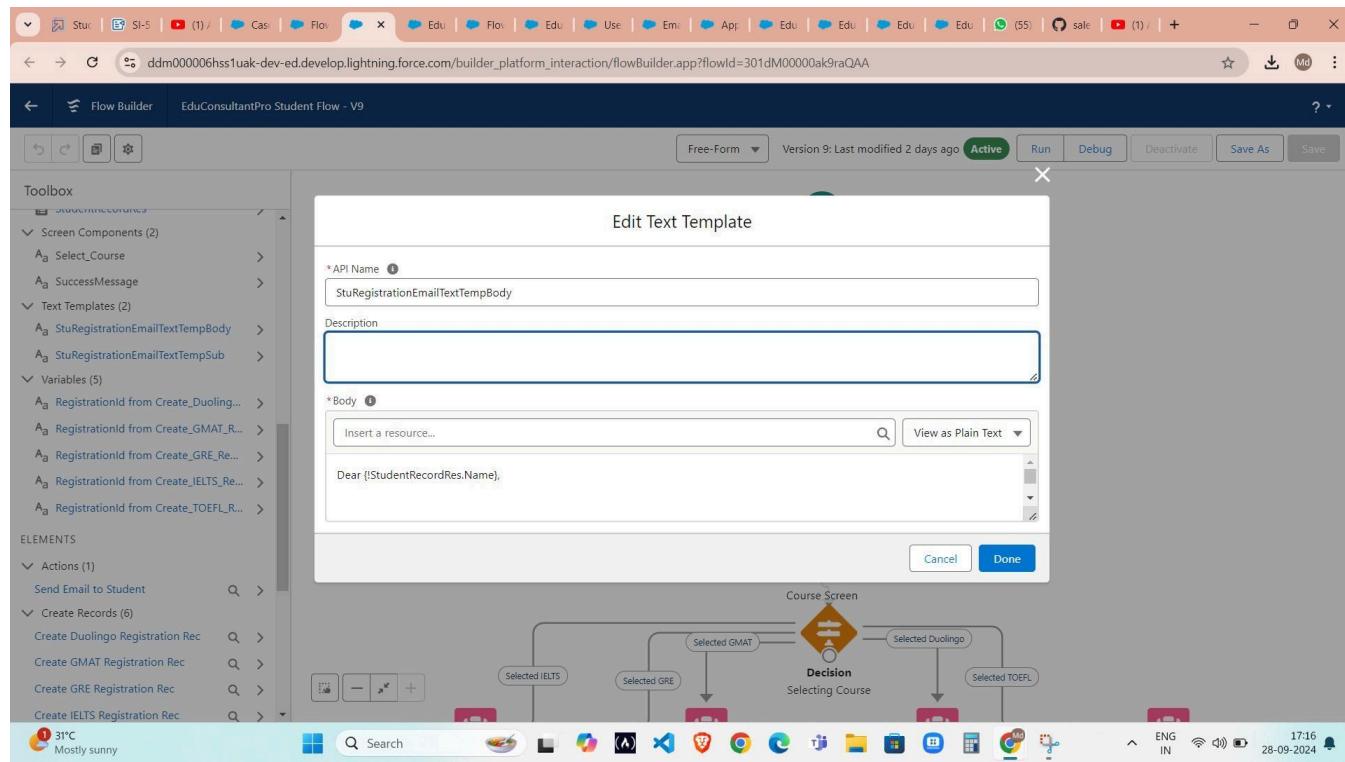
Engage with the Community : Join our vibrant community of students, professionals, and experts who share your passion for education and global opportunities. Connect with like-minded individuals, participate in discussions, and expand your network.

Once again, congratulations on taking this important step towards realizing your academic and career aspirations. We are thrilled to have you as part of the EduConsultantPro family and look forward to supporting you on your journey to success. If you have any questions or need assistance, please don't hesitate to contact us.

Thank you."

3. Click Done.
4. Repeat steps 1 & 2 to create an email text template for the email subject, label it as “StuRegistrationEmailTextTempSub”, write a text message in the body and save it.

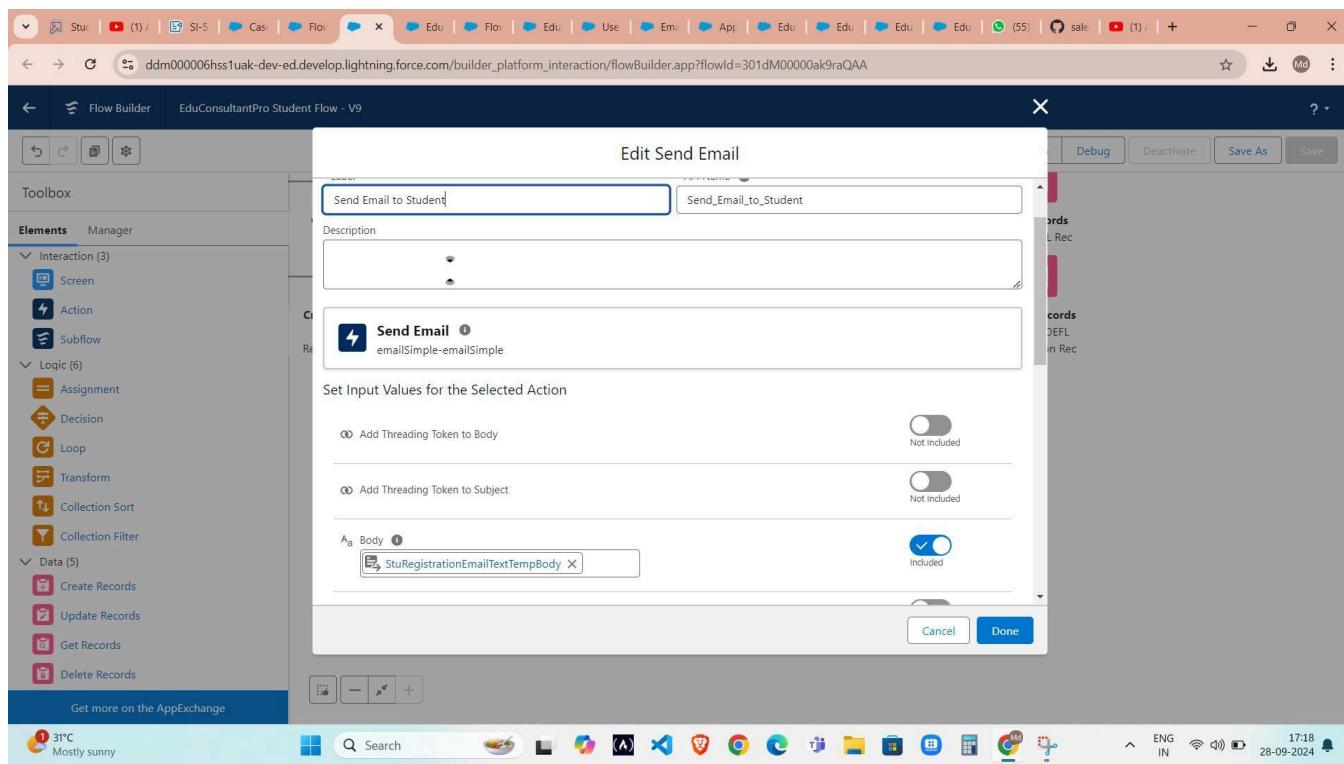




Add an Action Element

1. Add an Action Element after all the Decision paths; label it as "Send Email to Student".
2. Under "Set input values for selected action", include body, Recipient Address List, and Subject.
3. For input Body :

{!StuRegistrationEmailTextTempBody}, Recipient
 Address List : {!StudentRecordRes.Email_c},
 Subject : {!StuRegistrationEmailTextTempSub}.



Add Screen Element

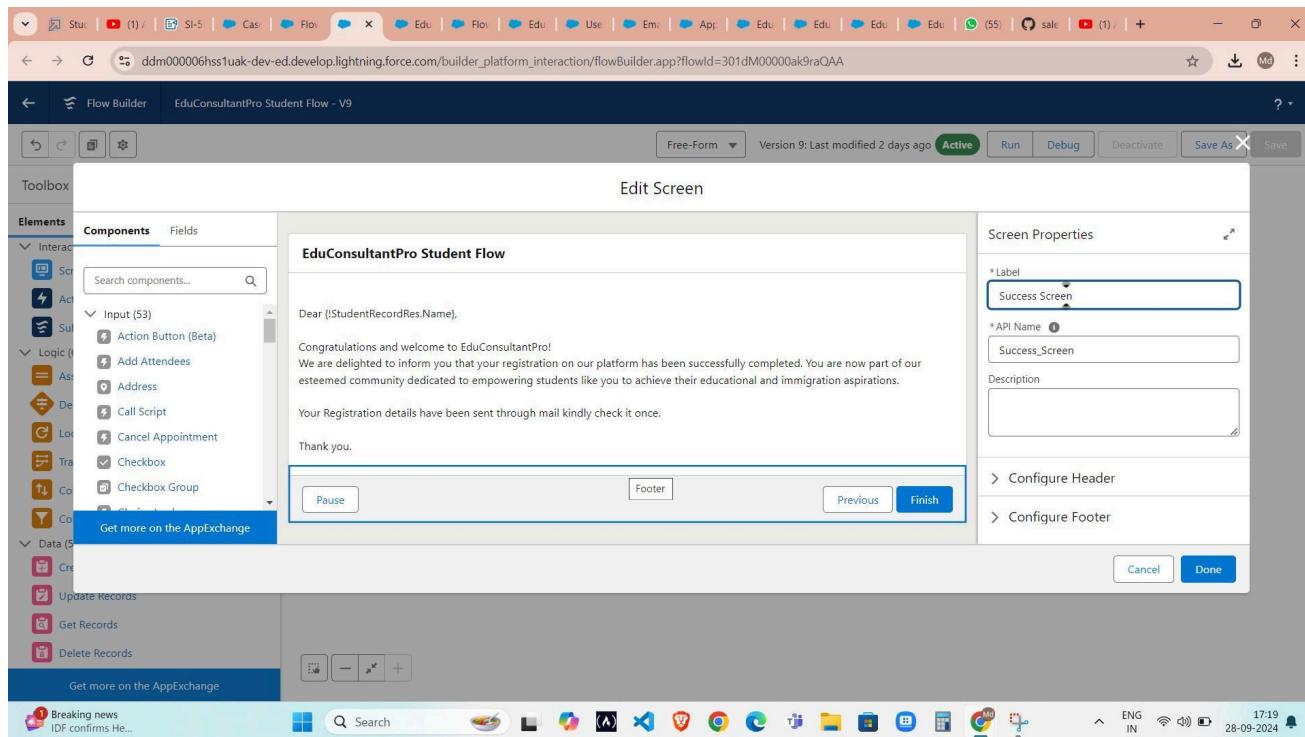
1. Add a Screen Element after the Send Email to Student Action Element, label it as Success Screen.
2. From the left side panel search for the Display text component and drag it to the main panel, label it as "SuccessMessage".
3. Paste the below in the Resource picker box. "Dear {!StudentRecordRes.Name},

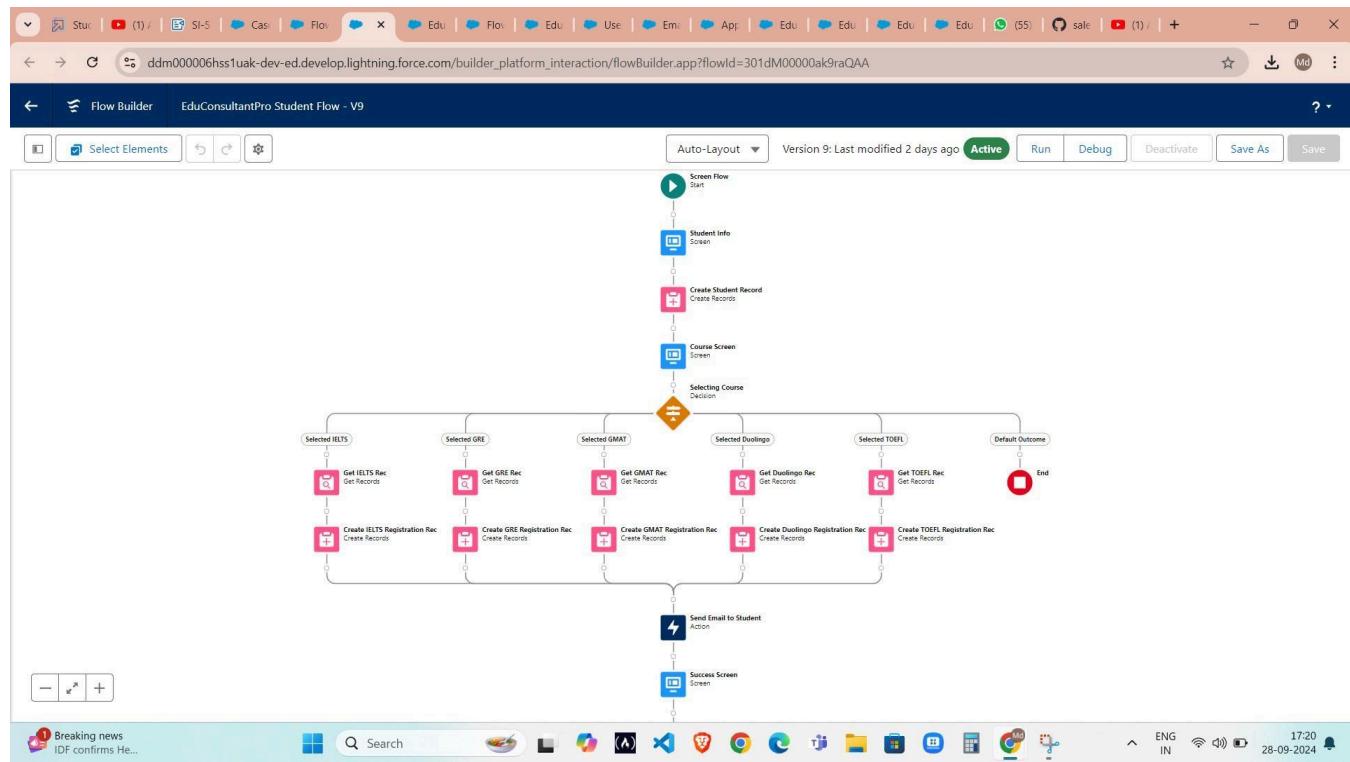
Congratulations and welcome to EduConsultantPro!

We are delighted to inform you that your registration on our platform has been successfully completed. You are now part of our esteemed community dedicated to

empowering students like you to achieve their educational and immigration aspirations. Your Registration details have been sent through mail; kindly check it once.

Thank you."





ACTIVITY 3:

Create Users

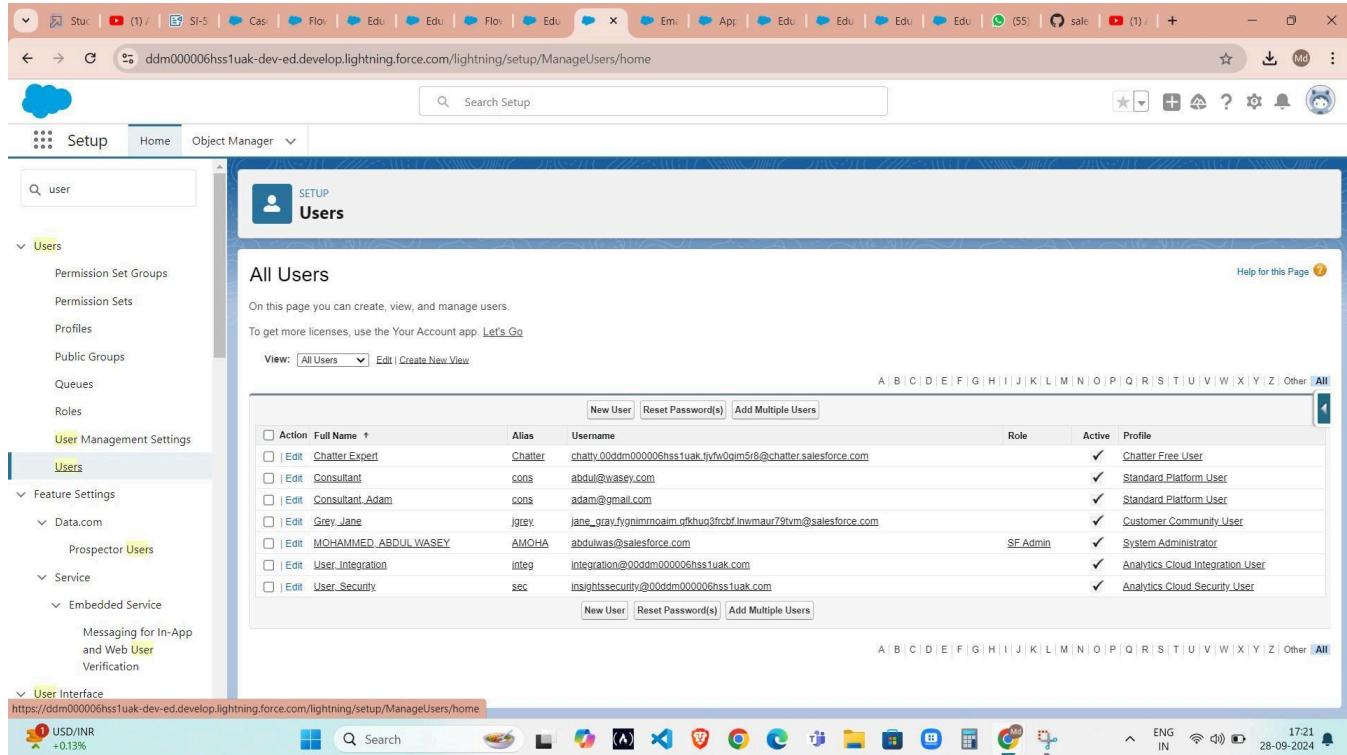
Create a user with a Standard platform user profile.

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

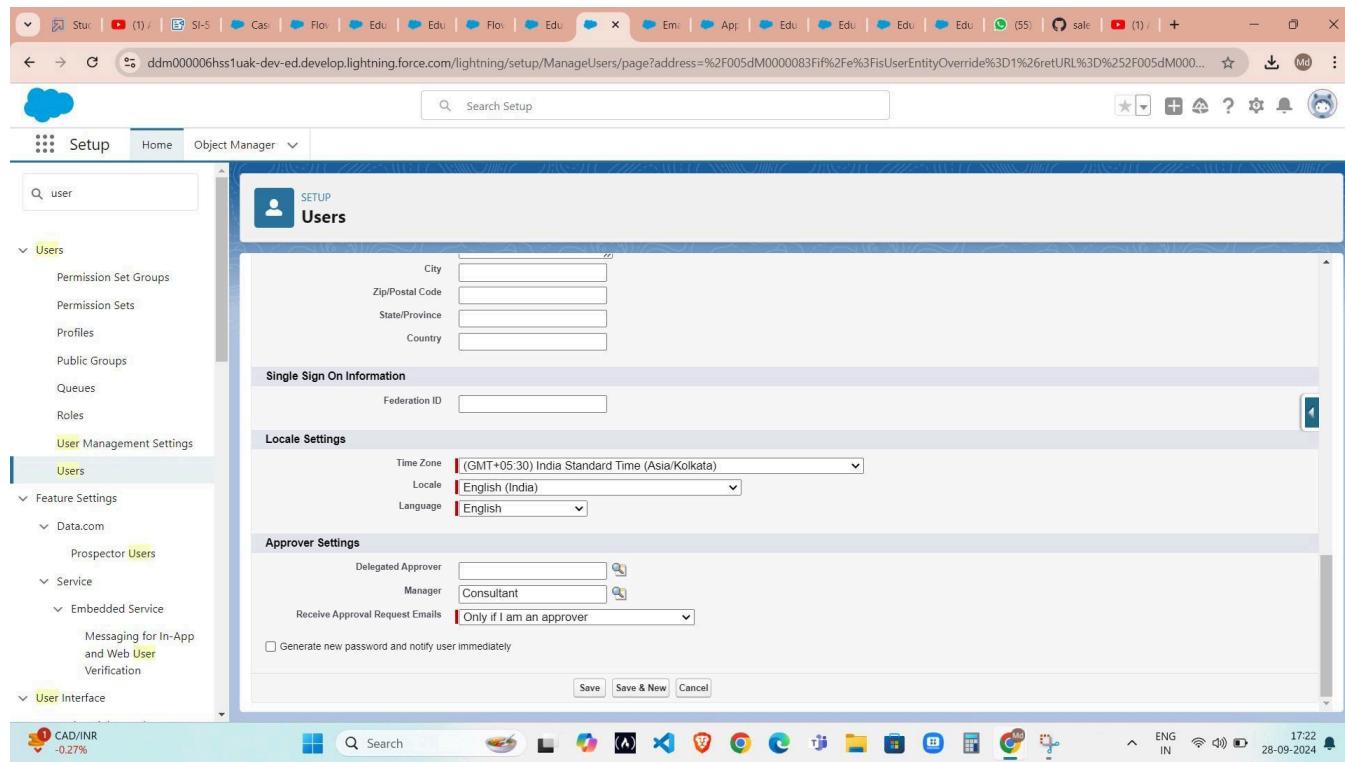


The screenshot shows the Salesforce Setup interface for managing users. The left sidebar is titled "Setup" and includes sections for Home, Object Manager, and various user-related settings like Permission Set Groups, Profiles, and Roles. The main content area is titled "Users" and displays a table of "All Users". The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The "Active" column contains checkmarks for most users, except for "User_Security" which is inactive. The "Profile" column lists profiles such as Chatter Free User, Standard Platform User, Customer Community User, System Administrator, Analytics Cloud Integration User, and Analytics Cloud Security User. At the bottom of the table, there are buttons for New User, Reset Password(s), and Add Multiple Users.

| Action | Full Name | Alias | Username | Role | Active | Profile |
|---------------------------------|----------------------|---------|--|----------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> Edit | Chatter Expert | Chatter | chatty@00ddm000006hss1uak.tlylw0qjm5r@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| <input type="checkbox"/> Edit | Consultant | cons | abdul@vasey.com | | <input checked="" type="checkbox"/> | Standard Platform User |
| <input type="checkbox"/> Edit | Consultant_Adam | cons | adam@gmail.com | | <input checked="" type="checkbox"/> | Standard Platform User |
| <input type="checkbox"/> Edit | Grey_Jane | jgray | jane_gravy@nimmoaim.gkhuo3rcbf.lnwmaur79tym@salesforce.com | | <input checked="" type="checkbox"/> | Customer Community User |
| <input type="checkbox"/> Edit | MOHAMMED_ABDUL_WASEY | AMOHA | abdulwas@salesforce.com | SF Admin | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> Edit | User_Integration | Integ | integration@00ddm000006hss1uak.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User_Security | sec | insightssecurity@00ddm000006hss1uak.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |

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" in the Manager Field.
3. Click Save.



ACTIVITY 4:

Create an Approval Process for Property Object

Create an Email Template

1. From Setup, enter Templates in the Quick Find box, and then select Lightning Email Templates, toggle on.
2. go to the app launcher, search for "Email Templates", Create a new folder with the desired

name.

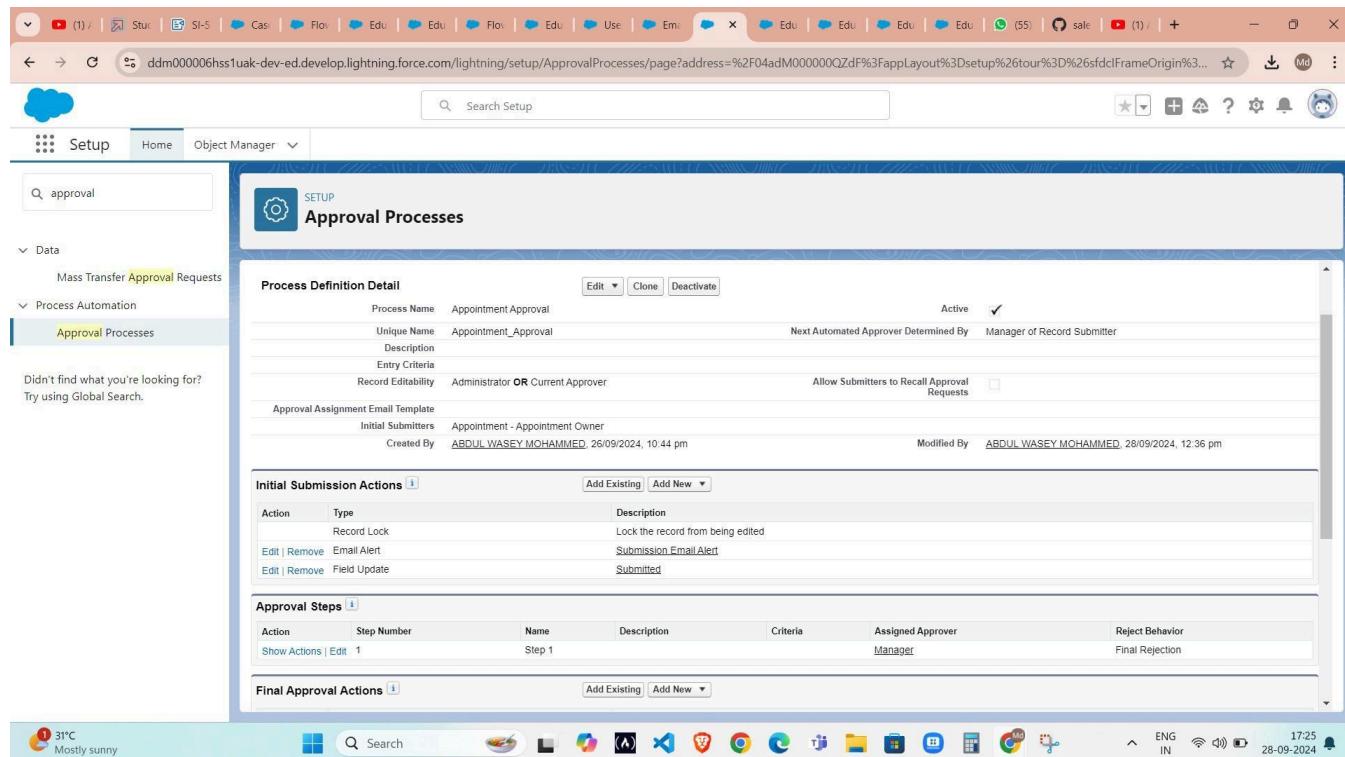
3. Then create a new email template, select the folder which we have created in the previous steps, enter the below text in the HTML Value and Save it as "Submission Template".

The screenshot shows the Hive App interface with the title 'Email Templates' and a sub-section 'Recent'. On the left, there's a sidebar with categories like 'EMAIL TEMPLATES', 'FOLDERS', and 'Shared with Me'. The main area displays a table of email templates with columns: Email Template Name, Description, Folder, Last Modified By, and Last Modified Date. Three templates are listed: 'Rejection Template', 'Approval Template', and 'Submission Template', all under the 'No Desires' folder. The 'Submission Template' was last modified by 'ABDUL WASEY MOHAMMED' on '26/9/2024, 10:16 pm'. At the bottom of the page, there's a toolbar with icons for search, file operations, and navigation.

| Email Template Name | Description | Folder | Last Modified By | Last Modified Date |
|---------------------|-------------|------------|----------------------|---------------------|
| Rejection Template | | No Desires | ABDUL WASEY MOHAMMED | 26/9/2024, 10:22 pm |
| Approval Template | | No Desires | ABDUL WASEY MOHAMMED | 26/9/2024, 10:21 pm |
| Submission Template | | No Desires | ABDUL WASEY MOHAMMED | 26/9/2024, 10:16 pm |

Create an Approval Process

1. From Setup, enter Approval in the Quick Find box, and then select Approval Processes.
2. In Manage Approval Processes For, select Appointment.
3. Click Create New Approval Process --> Use Jump Start Wizard.
4. Configure the approval process.
5. Process Name - Appointment Approval, Under Select Approver, Select Manager for the option : "Automatically assign an approver using a standard or custom hierarchy field."



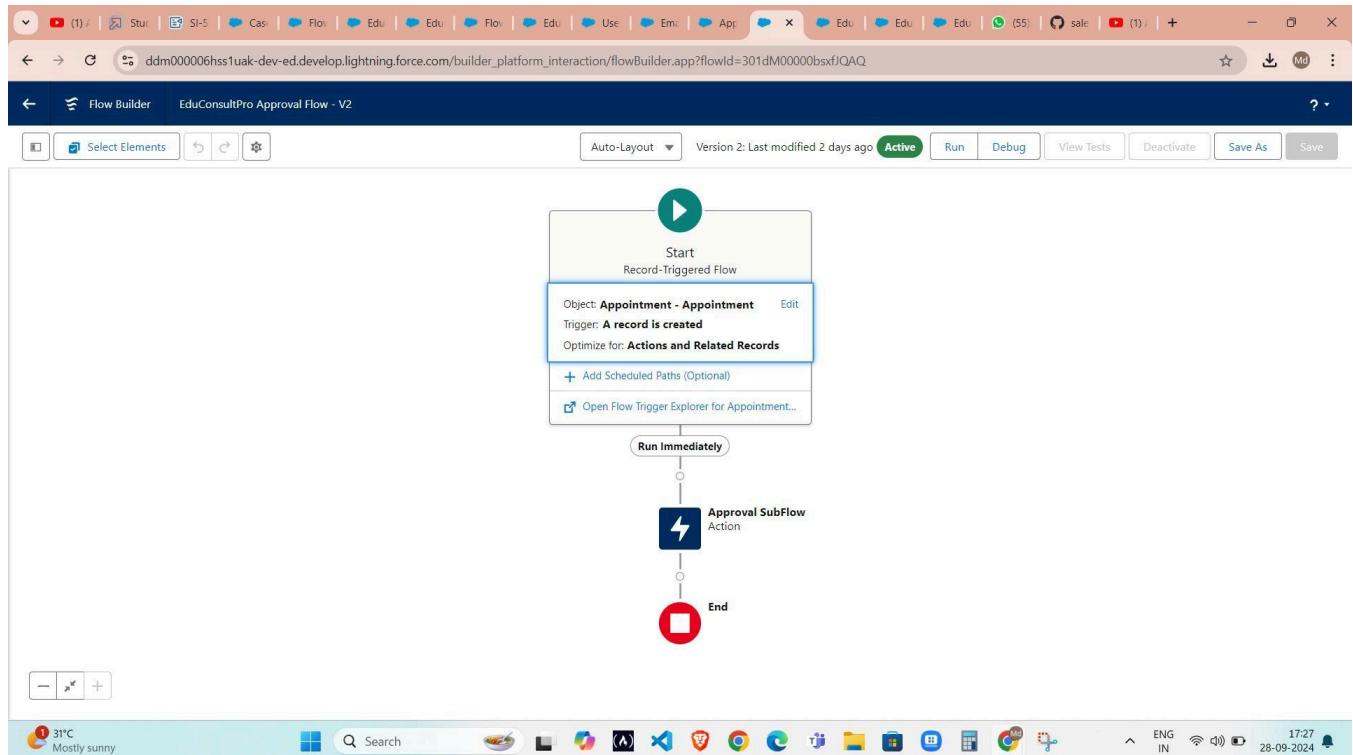
ACTIVITY 5:

Create a Record Triggered Flow

Configure the Start Element

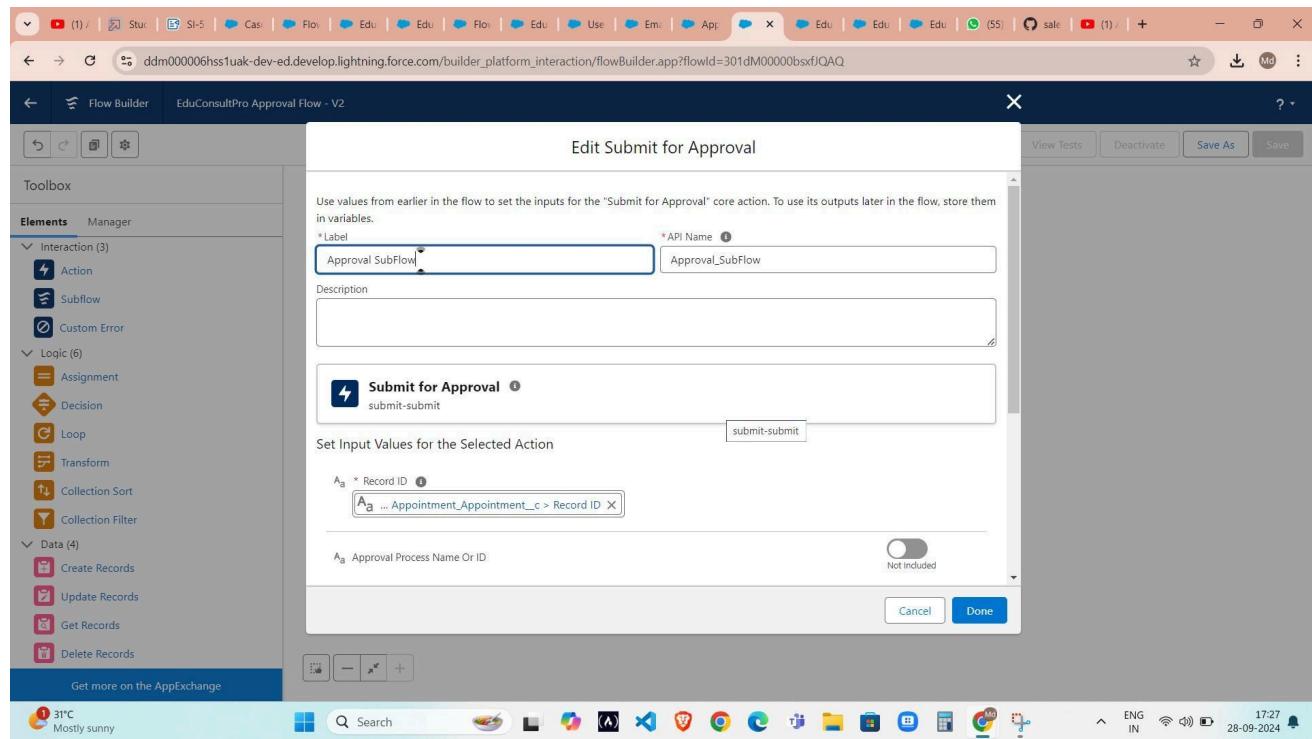
1. From Setup, enter Flows in the Quick Find box, then select Flows.
 2. Click New Flow.
 3. Select Record-Triggered Flow.
 4. Click Create. The Configure Start window opens.

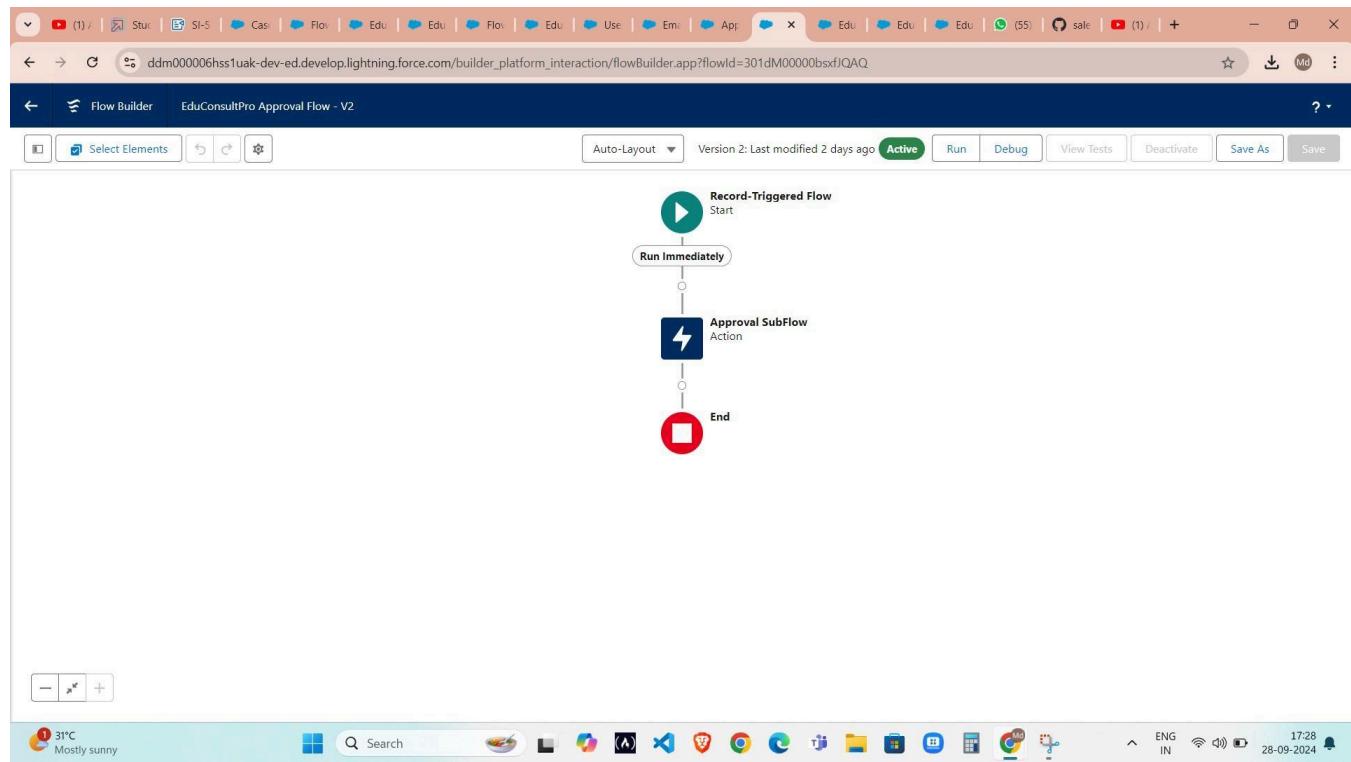
5. For Object, select Appointment.
6. For Trigger the Flow When, select A record is created



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}".





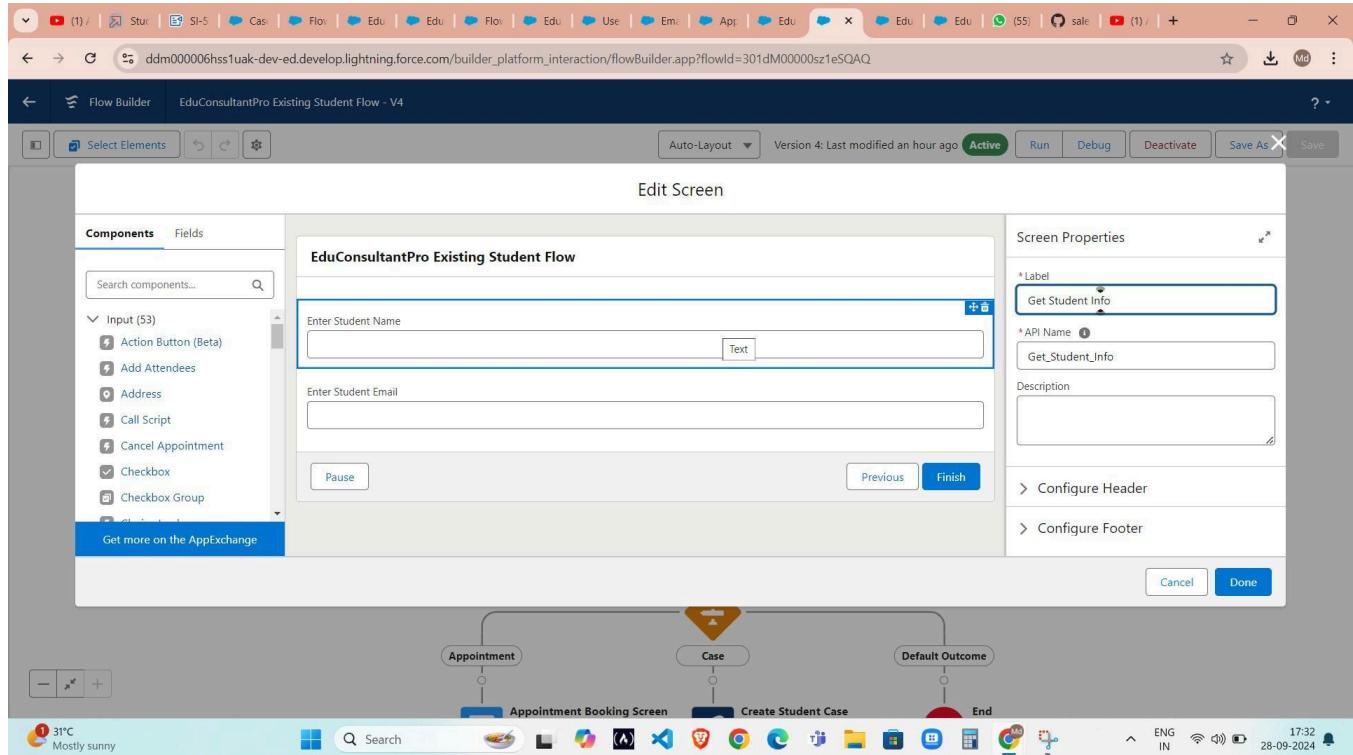
ACTIVITY 6:

Create a ScreenFlow for Existing Student to Book an Appointment

Add Screen Element

1. From Setup, enter Flow Builder in quick find, select new flow? ScreenFlow.
2. Add a Screen element.

3. In the Screen Properties pane, for Label, enter "Get Student Info".
4. Add two Text components from the left side panel. Give the Labels as follows: 1st Text Component Label : Enter Student Name
2nd Text Component Label : Enter Student Email



5.

Add GET Record Element

1. Add a GET Record Element after Decision Element, under the IELTS path and label it as "Get Rec".
2. Select Object : Student
Condition Requirement : All Conditions are Met(AND)
 1. Field : Student Name

Operator : Equals

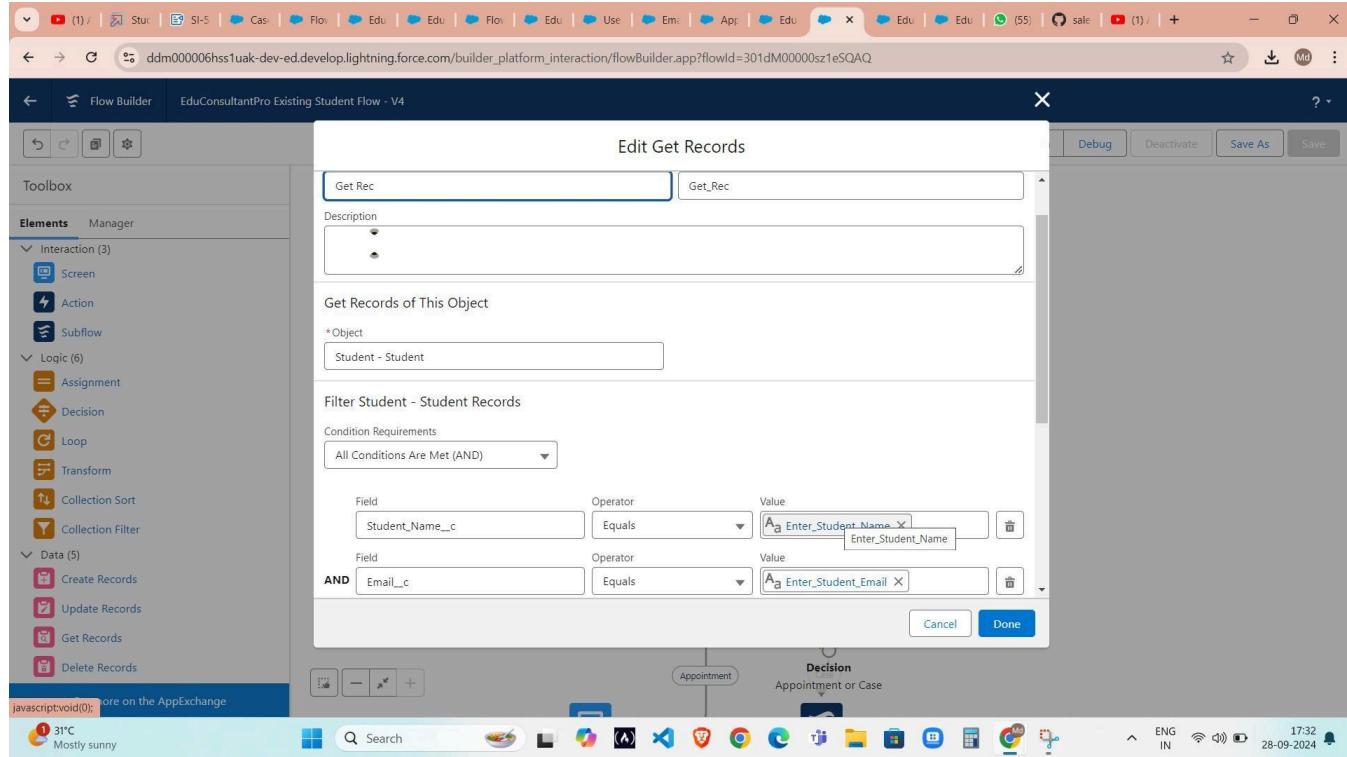
Value : {!Enter_Student_Name}

2. Field : Email_c

Operator :

Equals

Value : {!Enter_Student_Email}

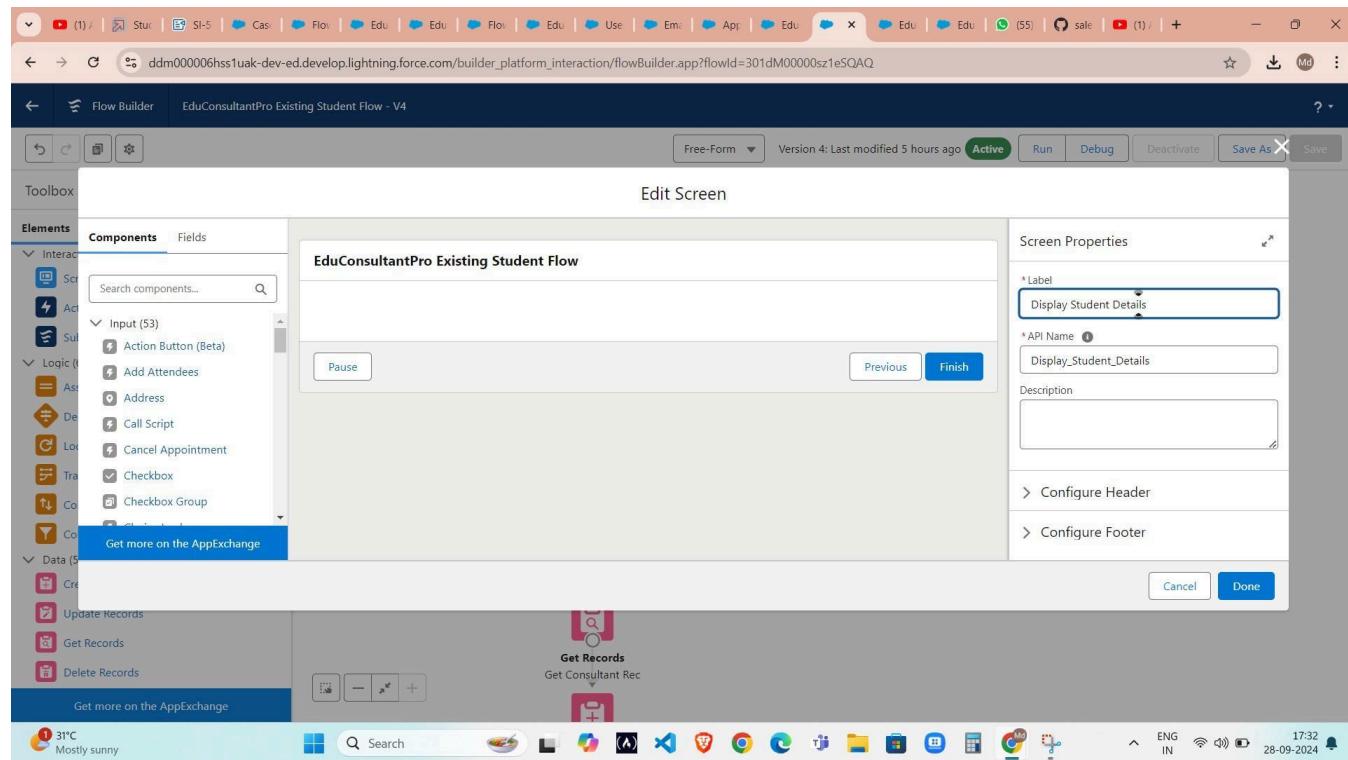


Add GET Record Element

1. Add a GET Record Element after Decision Element, under the IELTS path and label it as "Get Rec".
2. Select Object : Student

Condition Requirement : All Conditions are Met(AND)

1. Field : Student
Name Operator :
Equals
Value : {!Enter_Student_Name}
2. Field : Email_c
Operator :
Equals
Value : {!Enter_Student_Email}



Add Decision Element

1. Add a Decision Element after Select Display Student Details Element, label it as "Appointment or Case".
2. Under outcome, label it as "Appointment" and write the condition such as below:

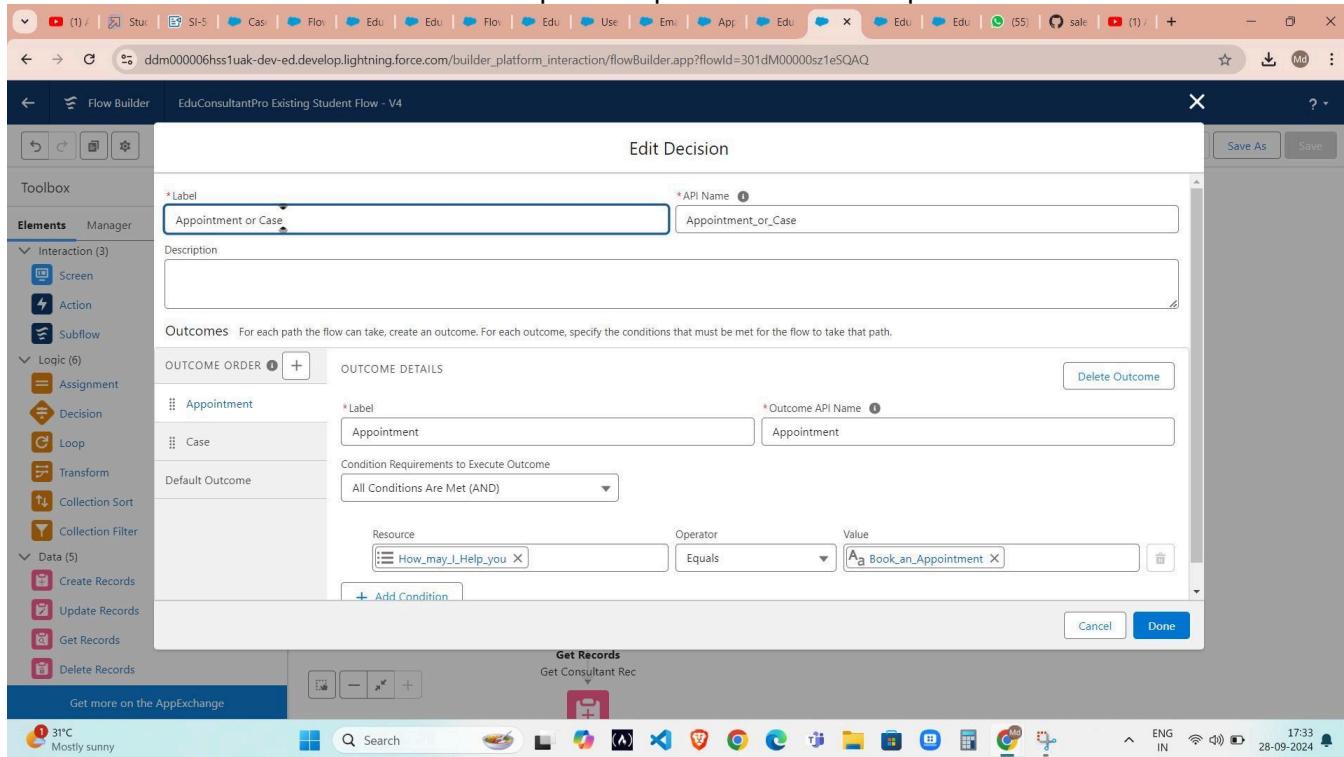
Resource :

{!How_may_I_Help_you}

Operator : Equals

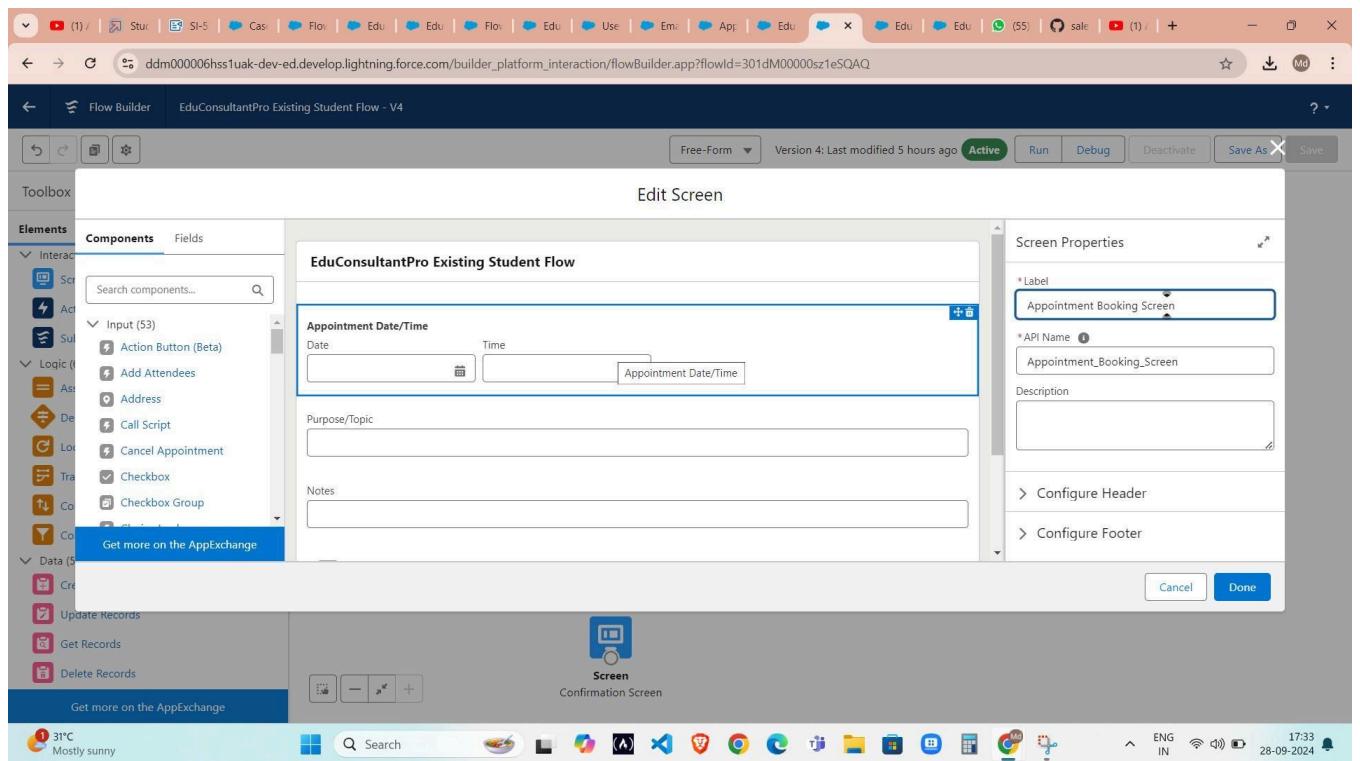
Value : {!Book_an_Appointment}

3. Click on the "+" icon and Repeat step 2 for the Case options mentioned.



Add Screen Element

1. Add a Screen element after the Decision Element, on the Appointment path, and label it as "Appointment Booking Screen".
2. Click on Fields, click on the record variable input and create a new Resource (AppointmentRecordRes) to display all the fields which are in the Appointment object.
3. Drag all the fields which are needed to add on the screen in order to collect the student information.



Add GET Record Element

1. Add a GET Record Element after the Decision Element, under the Appointment path, and label it as "Get Consultant Rec."
2. Select Object : Consultant

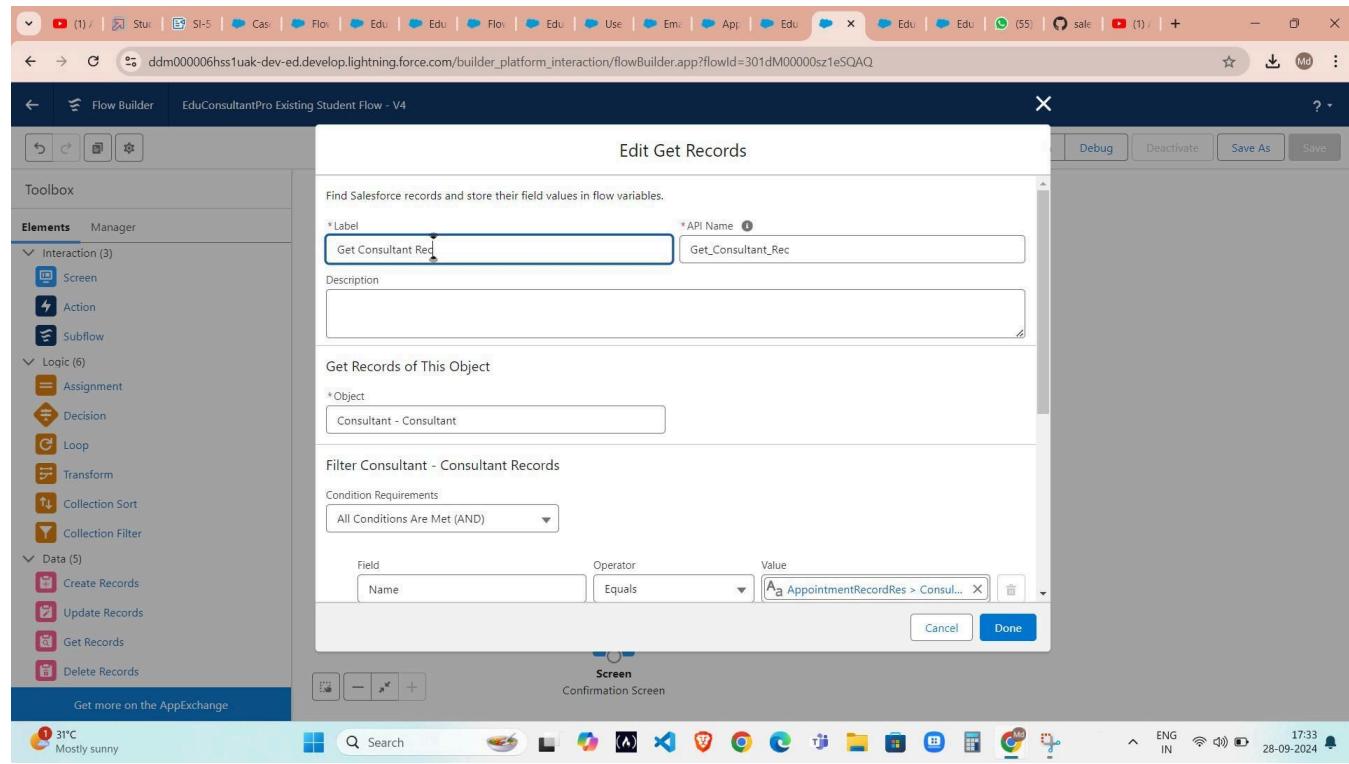
Condition Requirement : All Conditions are Met(AND)

1. Field : Name

Operator :

Equals

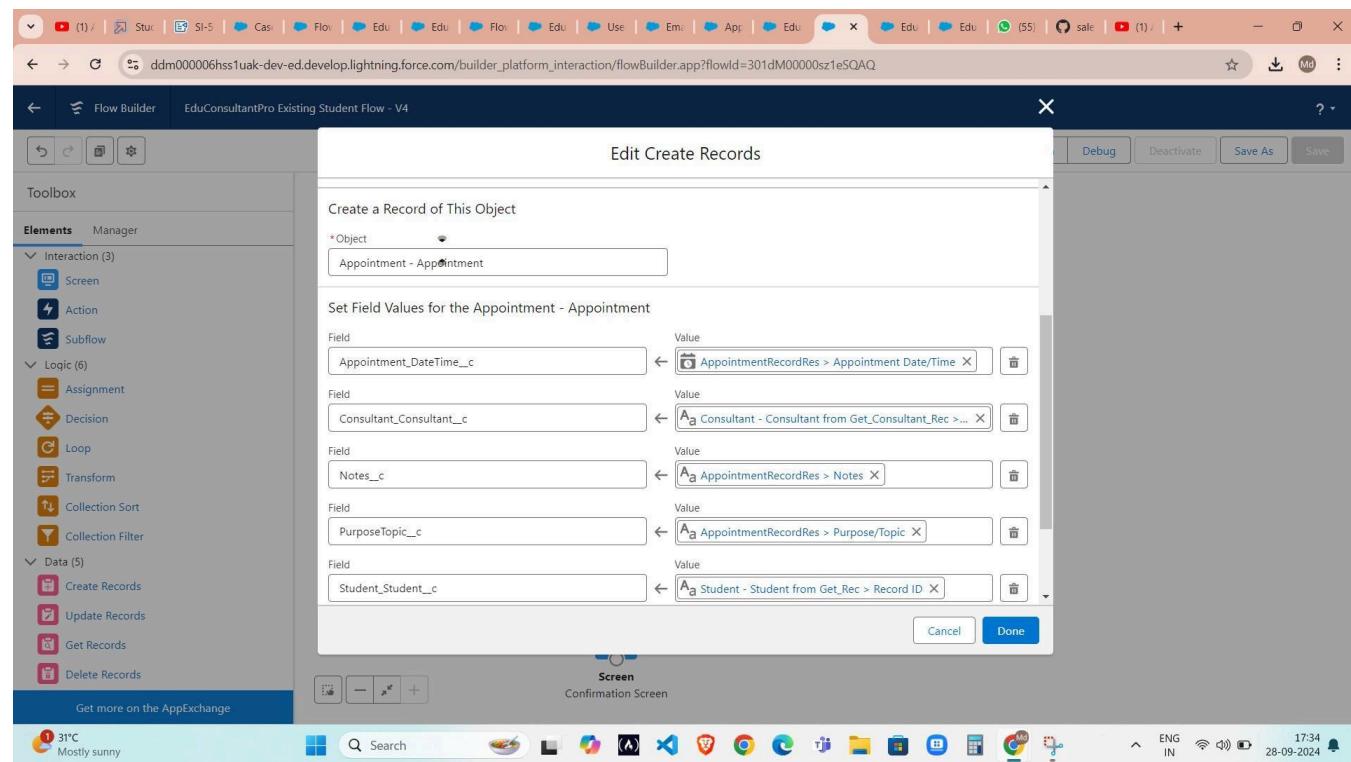
Value : {!AppointmentRecordRes.Consultant_Name_c}



Create Appointment Record using Create Records Element

1. Add a Create element after the Get Consultant Rec element and label it as "Create Appointment".
2. Select "one" under How many records to Create, and select "Use separate resources and literal values" under How to Set the record fields.
3. Select Object : Appointment
 1. Field : Appointment_DateTime_c
Value : {!AppointmentRecordRes.Appointment_DateTime__c}
 2. Field : Consultant_c

- Value : {!Get_Constant_Rec.Id}
3. Field : Notes_c
Value : {!AppointmentRecordRes.Notes_c}
 4. Field : PurposeTopic_c
Value : {!AppointmentRecordRes.PurposeTopic_c}
 5. Field : Student_Name_c
Value : {!Get_Rec.Id}



Add Screen Element

1. Add a Screen Element after the Send Email to Student Action Element, label it as "Confirmation Screen".

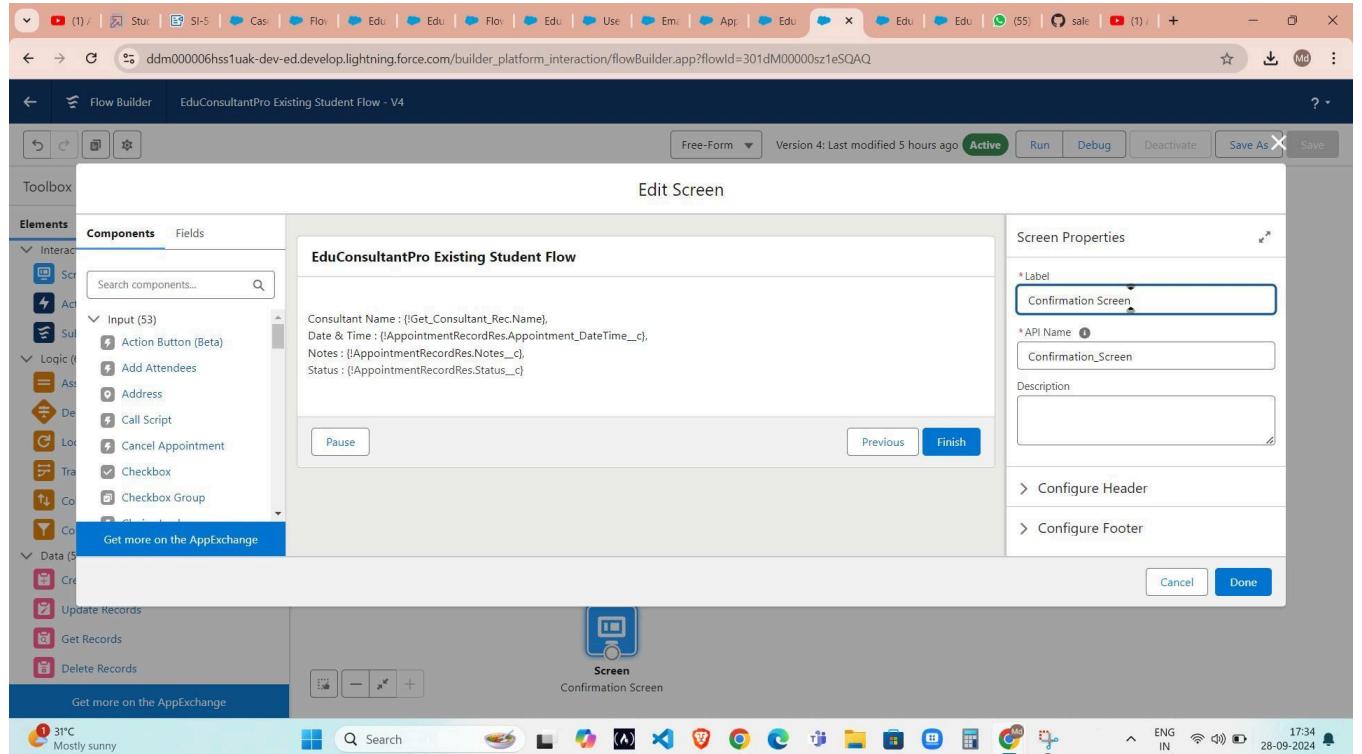
- From the left side panel search for the Display text component and drag it to the main panel, label it as "Appointment_Confirmation".
- Paste the below in the Resource picker box.

Consultant Name :

{!Get_Consultant_Rec.Name},

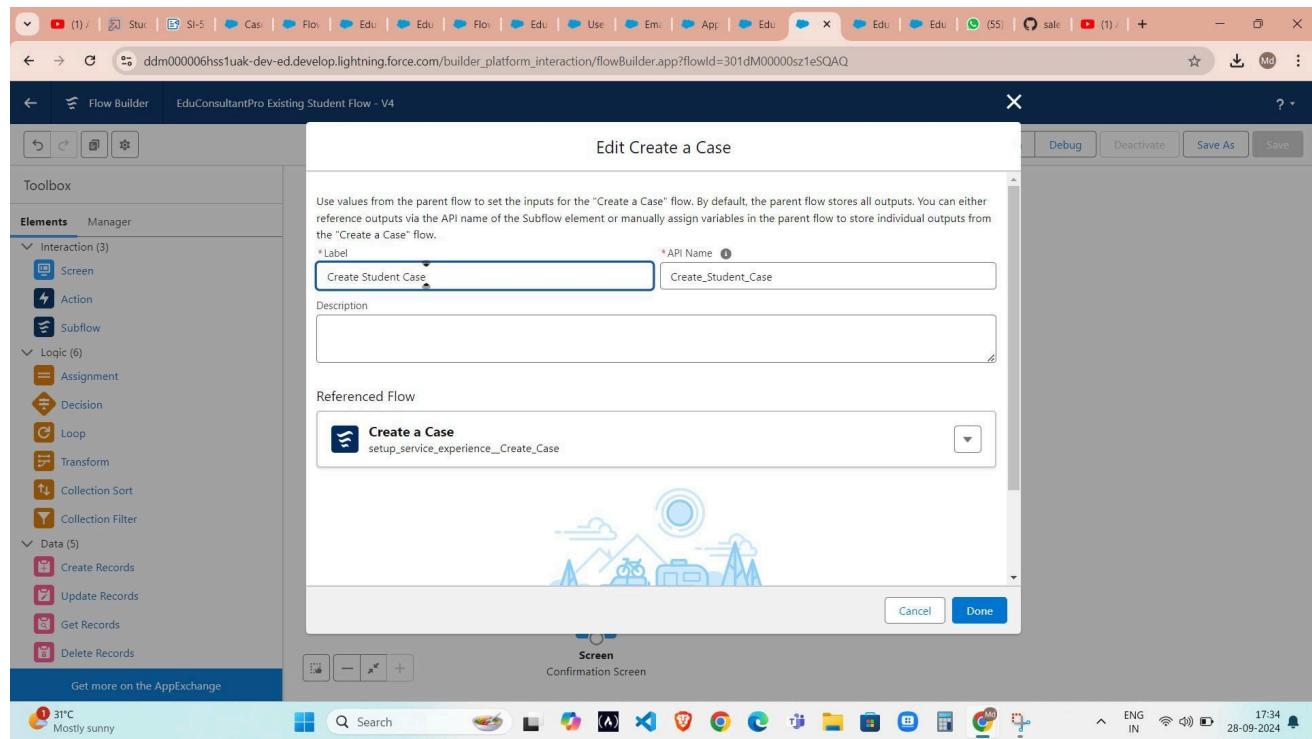
Date & Time : {!AppointmentRecordRes.Appointment_DateTime__c},

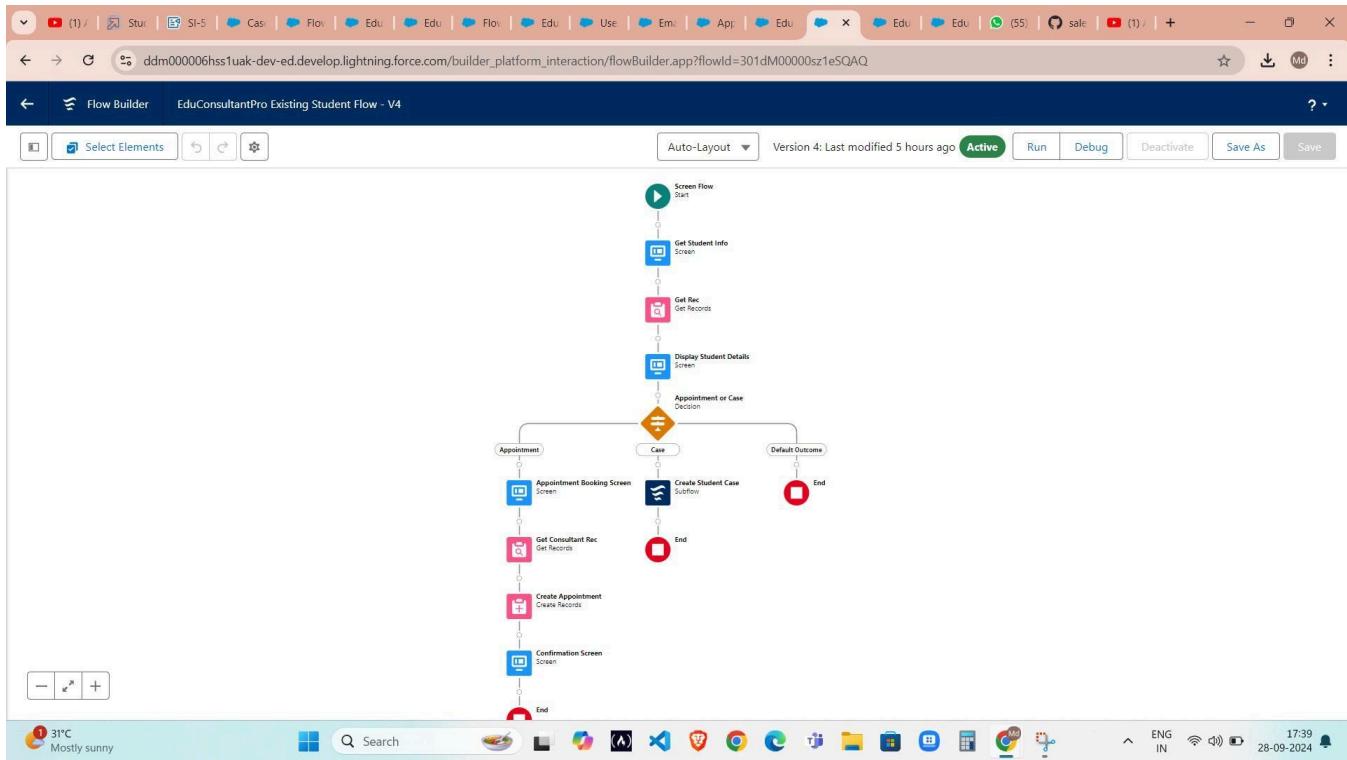
Notes : {!AppointmentRecordRes.Notes__c},



Add an SubFlow Element

- Add a sub flow element after the Decision Element, on the Case path, and search and Select for “Create a Case”, label it as “Create Student Case”.
- Save the flow and label it as “EduConsultantPro Existing Student Flow”





ACTIVITY 7:

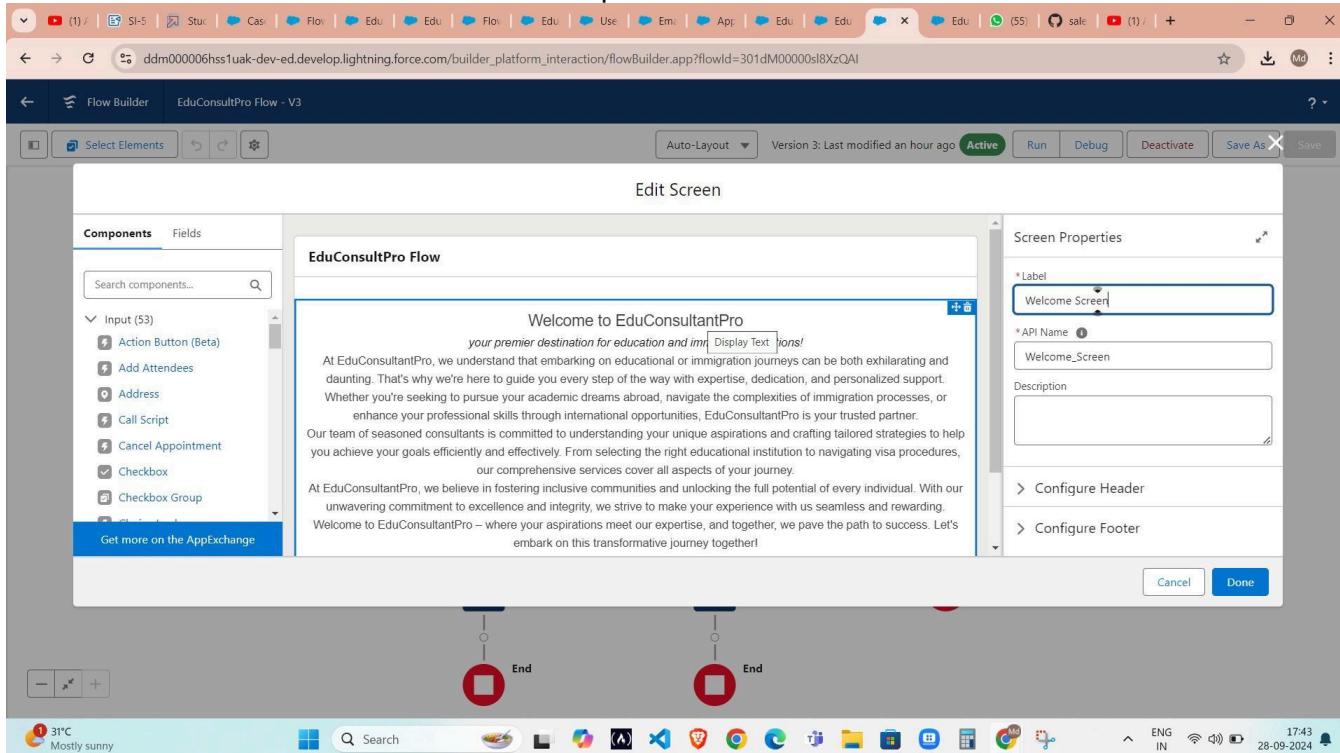
Create a ScreenFlow to Combine all the flows at one place

Add Screen Element

1. Add a Screen Element and label it as Welcome Screen.
2. From the left side panel search for the Display text component and drag it to the main

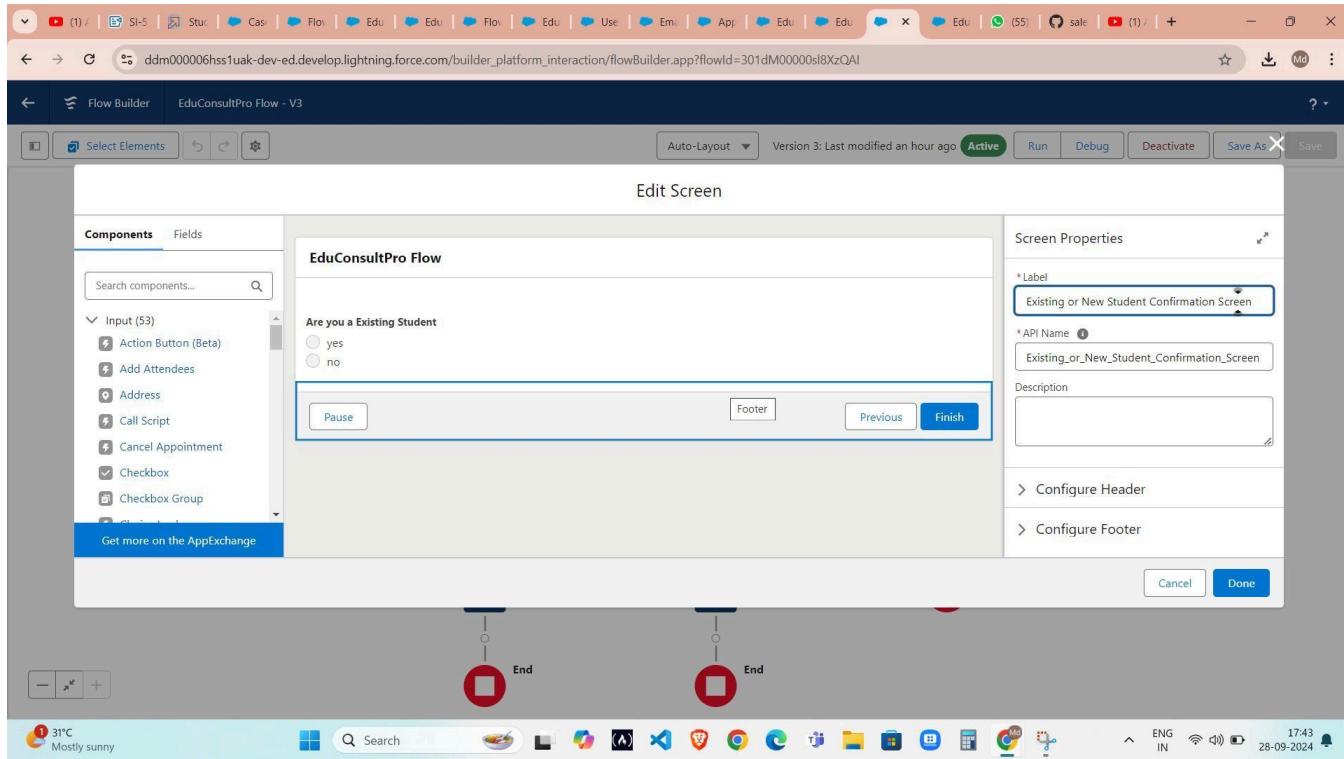
panel, label it as "SuccessMessage".

3. Paste the below in the Resource picker box.



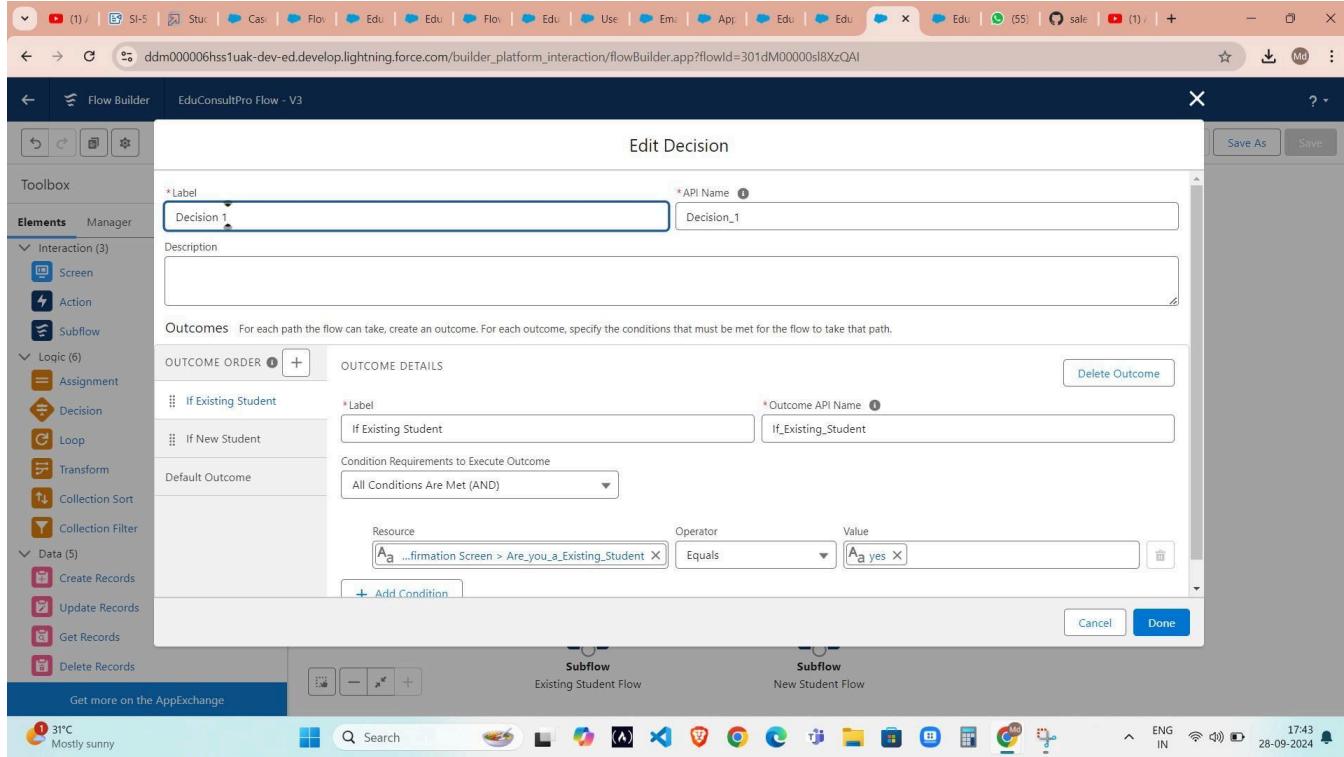
Add Screen Element

1. Add a Screen Element after the Welcome Screen Element; label it as "Existing or New Student Confirmation Screen".
2. Add a radio button component from the left side panel, label : Are you a Existing Student
3. Click on Add Choice --> type "Yes" in the input field --> click Create Yes choice.
4. Repeat step 6 and create an "No" choice resource.



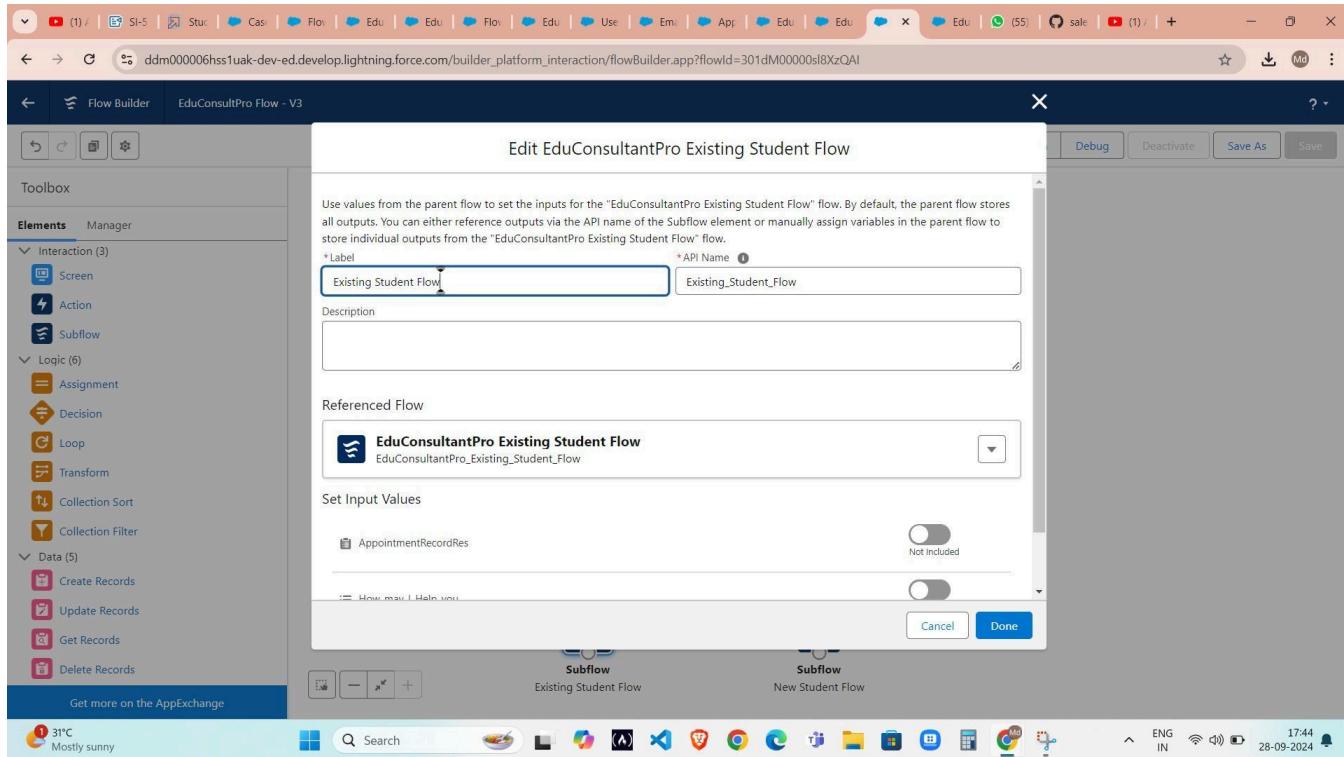
Add Decision Element

1. Add a Decision Element after Existing or New Student Confirmation Screen Element, label it as "Decision 1".
2. Under outcome, label it as "If Existing Student" and write the condition such as below:
Resource : {!Are_you_a_Existing_Student}
Operator : Equals
Value : {!Yes}
3. Click on the "+" icon and Repeat step 2 for No options mentioned



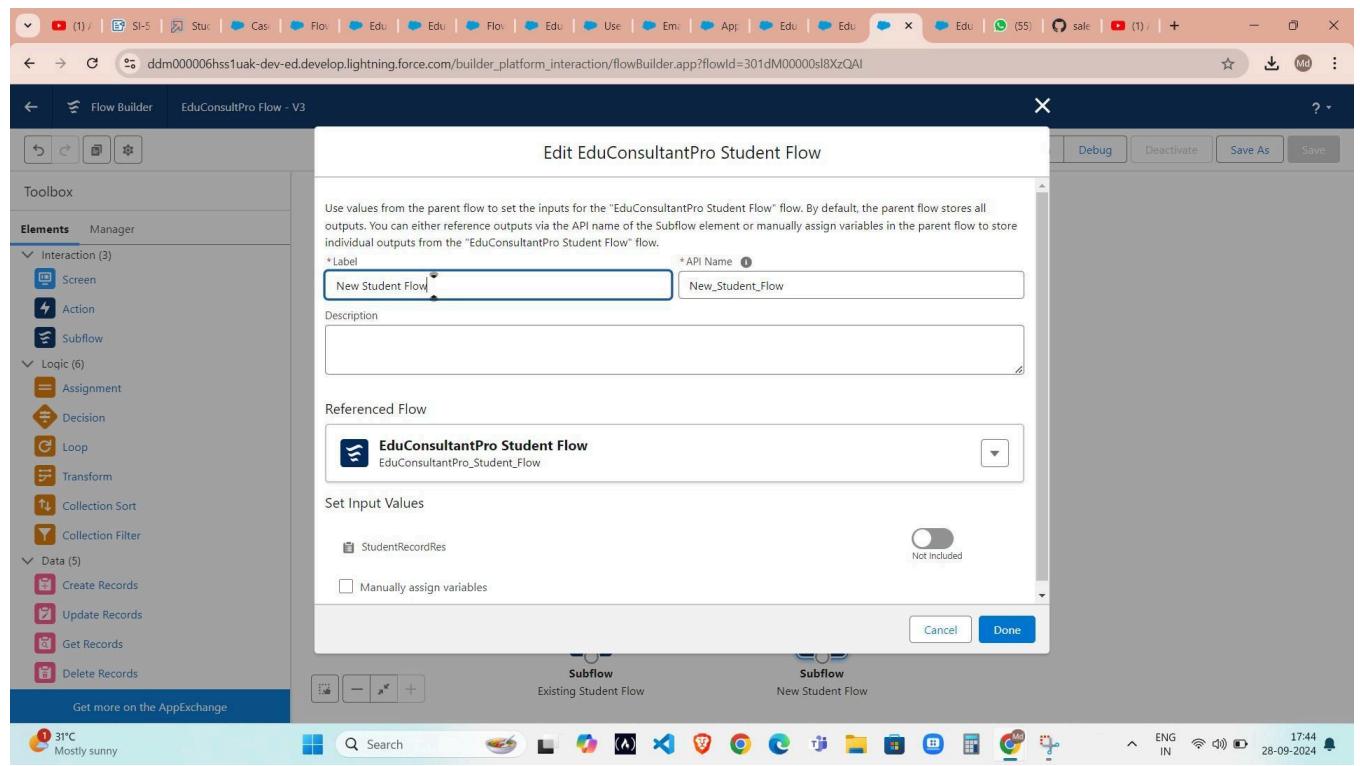
Add an SubFlow Element

1. Add a sub flow element after the Decision 1 Element on the if Existing Student path and search and Select for "EduConsultantPro Existing Student Flow ", label it as "Existing Student Flow".
2. Save the flow and label it as "EduConsultantPro Existing Student Flow".

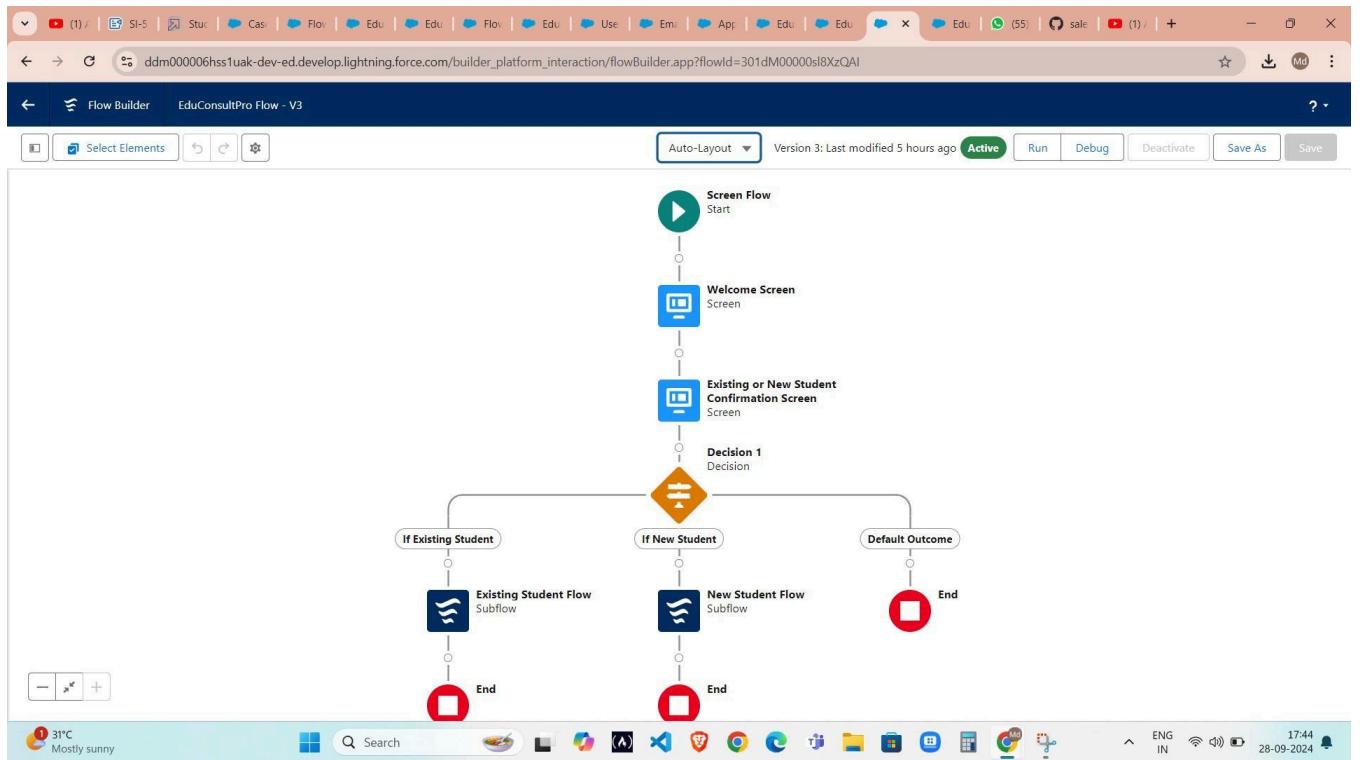


Add an SubFlow Element

1. Add a sub flow element after the Decision 1 Element on the if Not an Existing Student path and search and Select for "EduConsultantPro Student Flow ", label it as "New Student Flow".
2. Save the flow and label it as "EduConsultantPro Existing Student Flow".
3. Click Done.
4. Save the flow and label it as "EduConsultantPro Flow", you can use the below image for reference.



5.



ACTIVITY 8:

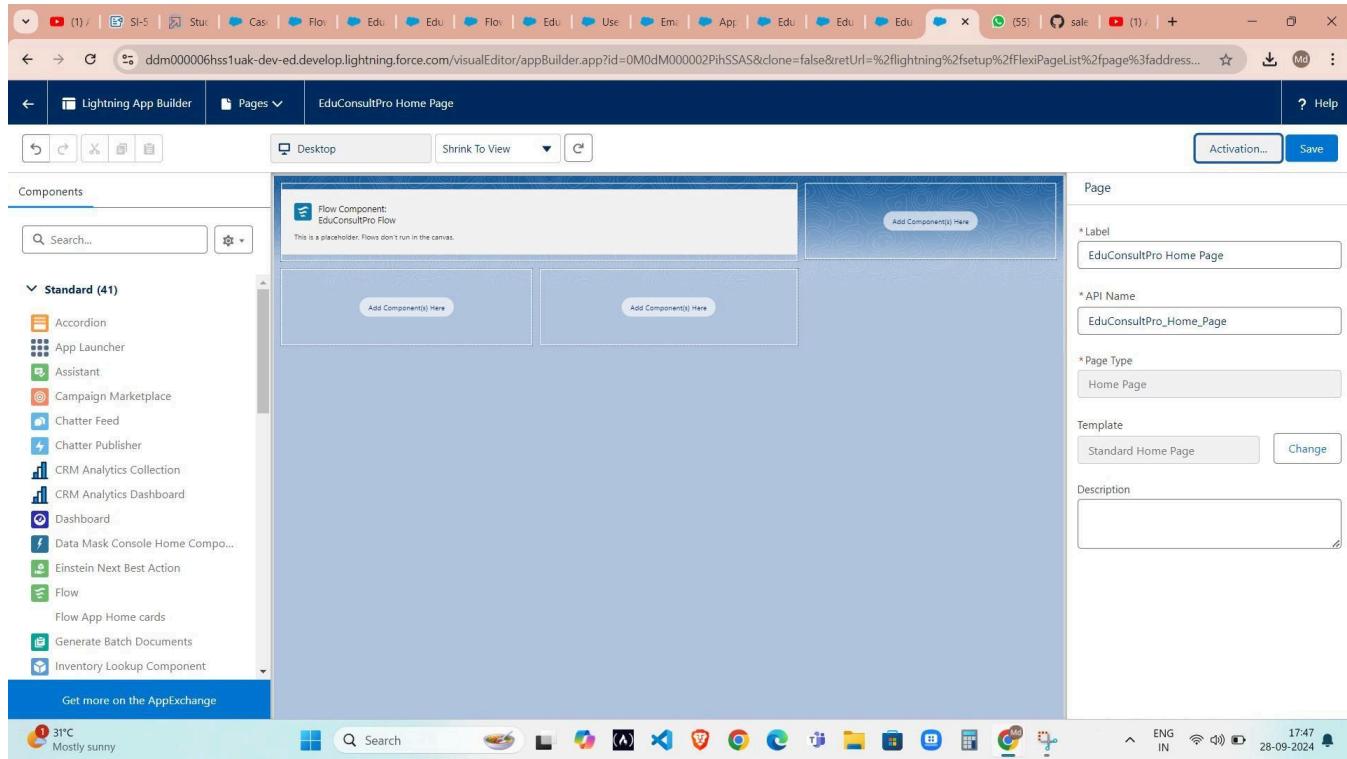
Create a lightning app page

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

Create a lightning app page

1. From Setup, enter App Builder in the Quick Find box, then click Lightning App Builder.
2. Click New, select Home Page, then click Next.

3. Step through the wizard and name the page "EduConsultPro Home Page", select the Standard Home Page template, and then click Done.
4. Drag the Flow component to the top-right region.
5. Search for the "EduConsultantPro Flow" and click Save



THANK YOU