

Project Title: Enhancing Admission Management and Student Engagement Using Salesforce CRM

1. Project Overview

This project focuses on the development of a CRM application to streamline the services offered by EduConsultPro Institute. As a leading educational institution, EduConsultPro offers diverse courses and programs and faces challenges in managing the growing number of student enquiries, admission processes, and consulting services. The goal of this project is to provide a comprehensive solution leveraging Salesforce CRM to enhance operational efficiency, improve user experience, and support EduConsultPro's long-term vision.

2. Objectives

Business Goals:

- Streamline the admission process for prospective students.
- Improve the transparency and efficiency of the enquiry management system.
- Enable effective case management for expert consulting services.

Specific Outcomes:

- A centralized system for managing student enquiries and applications.
- Automation of admission reviews and processes.
- Enhanced transparency in student interactions.

3. Salesforce Key Features and Concepts Utilized

The project leverages Salesforce CRM's key features, including:

- Customizable dashboards and reports for admission tracking.
- Workflow automation for enquiry and application processing.
- Case management for expert consulting services.

- Integration with other systems for seamless data exchange.

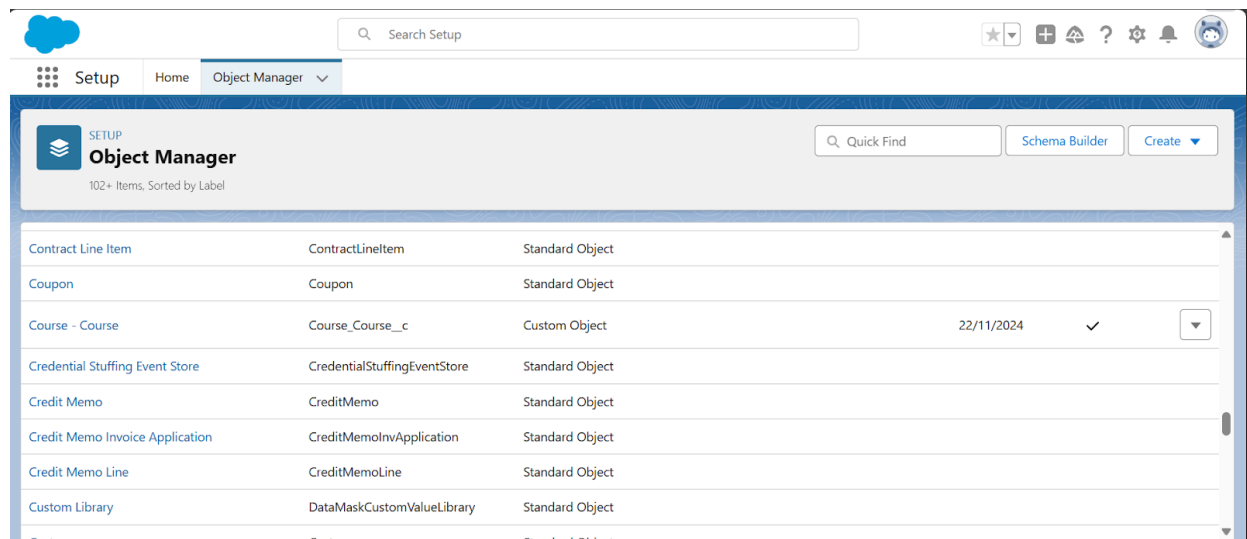
4. Detailed Steps to Solution Design

The solution design involves the following key steps:

1. Creating data models to represent courses, students, enquiries, and cases.
2. Designing user-friendly interfaces for admissions staff and prospective students.
3. Implementing business logic and workflows to automate processes.
4. Ensuring proper documentation with screenshots and diagrams for each module.

Custom Objects:

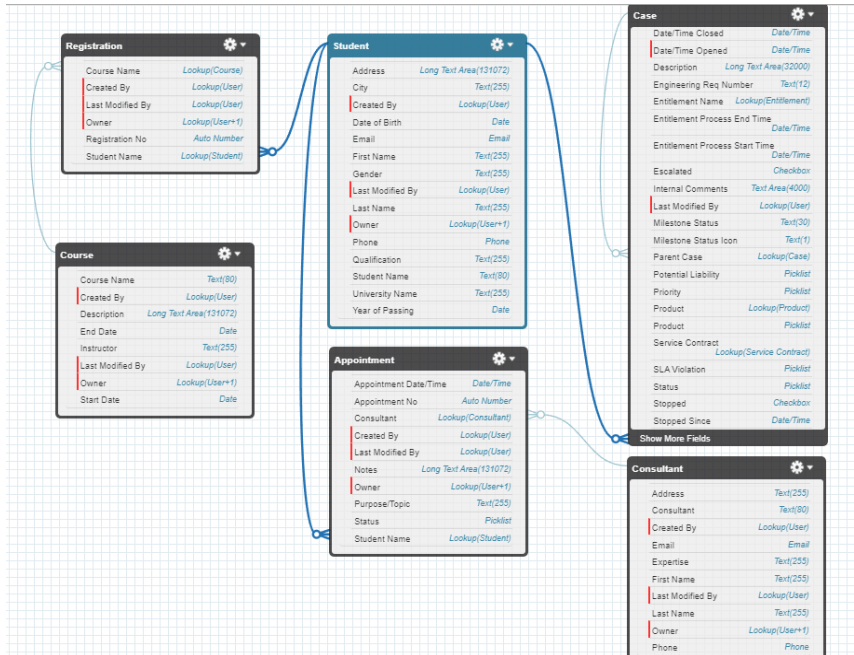
1. Course
2. Consultant
3. Student
4. Appointment



The screenshot shows the Salesforce Setup interface, specifically the Object Manager. The top navigation bar includes the Setup icon, a search bar labeled "Search Setup", and various utility icons. Below the navigation bar, the "Object Manager" tab is selected. The main content area displays a table of objects, with a header bar showing "SETUP Object Manager" and "102+ Items, Sorted by Label". The table lists various objects, including standard and custom objects. The "Course - Course" object is highlighted as a custom object.

Object Label	Object Name	Object Type	Last Modified By	Last Modified Date	Actions
Contract Line Item	ContractLineItem	Standard Object			
Coupon	Coupon	Standard Object			
Course - Course	Course_Course__c	Custom Object		22/11/2024	✓
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object			
Credit Memo	CreditMemo	Standard Object			
Credit Memo Invoice Application	CreditMemoInvApplication	Standard Object			
Credit Memo Line	CreditMemoLine	Standard Object			
Custom Library	DataMaskCustomValueLibrary	Standard Object			
Customer	Customer	Standard Object			

Relationship Among the Objects:



Custom Tabs:

SETUP
Tabs

Custom Object Tabs

New

What Is This?

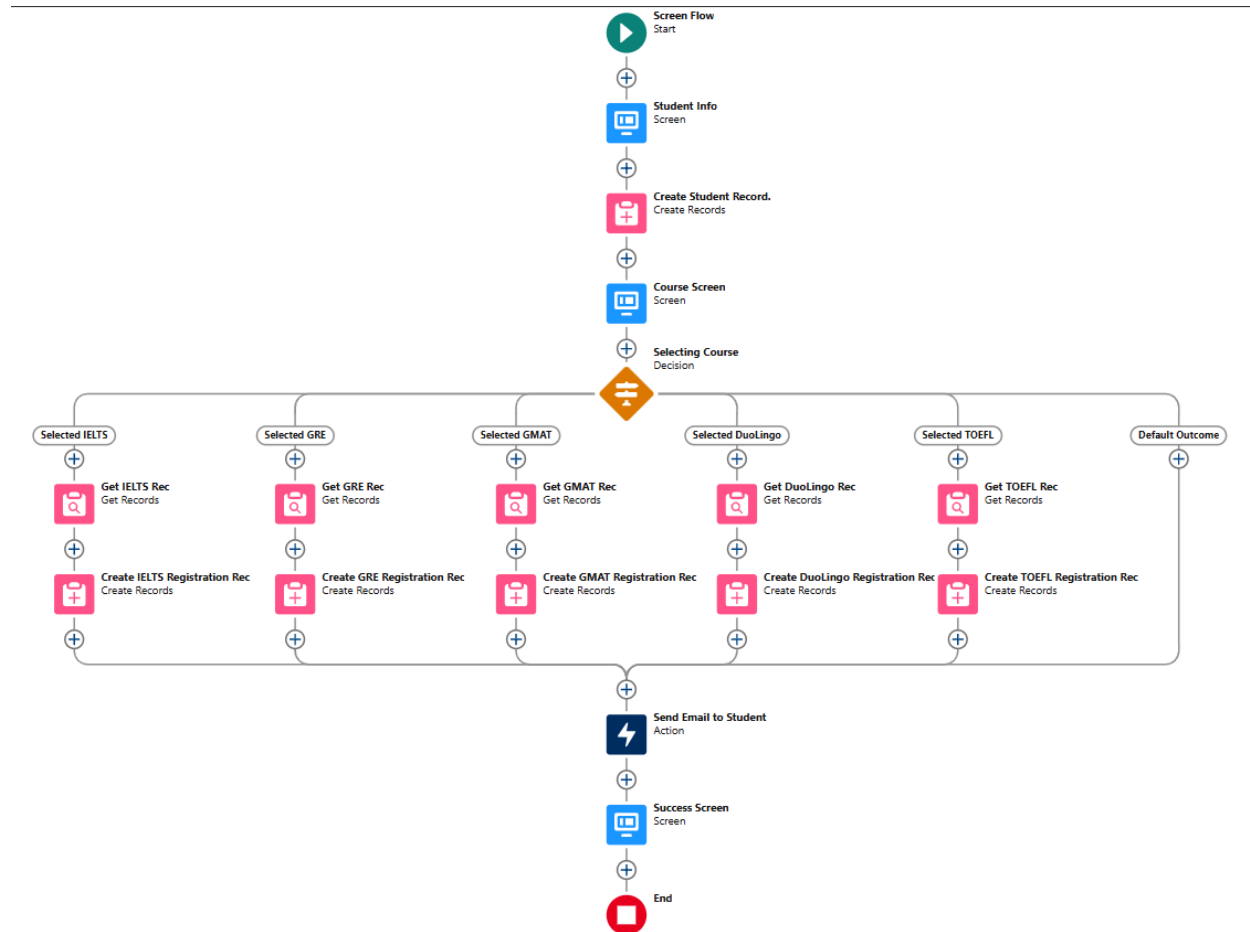
Action	Label	Tab Style	Description
Edit Del	Appointment - Appointment	Box	
Edit Del	Book Line Items	Pencil	
Edit Del	Book Orders	Stack of Cash	
Edit Del	Books	Books	
Edit Del	Consultant - Consultant	Box	
Edit Del	Course - Course	Box	
Edit Del	Registrations	Phone	
Edit Del	Student - Student	Box	

Web Tabs

New

What Is This?

ScreenFlow for Student Admission Application Process:



Create User:

Approver Settings

Delegated Approver

Manager

Consultant

Receive Approval Request Emails

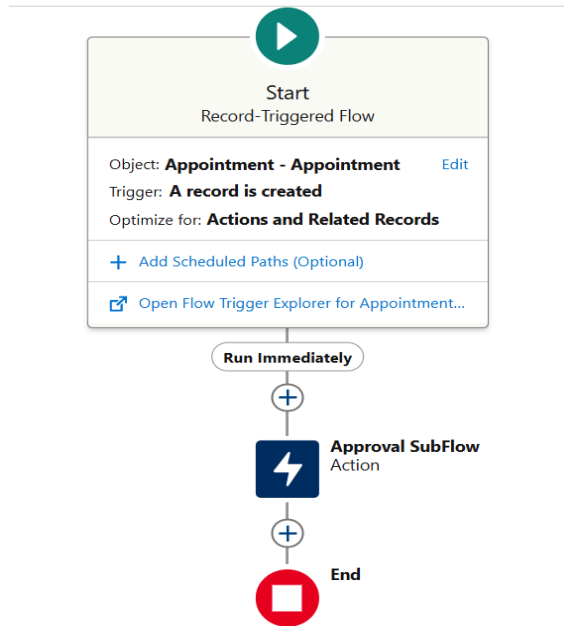
Only if I am an approver

Save

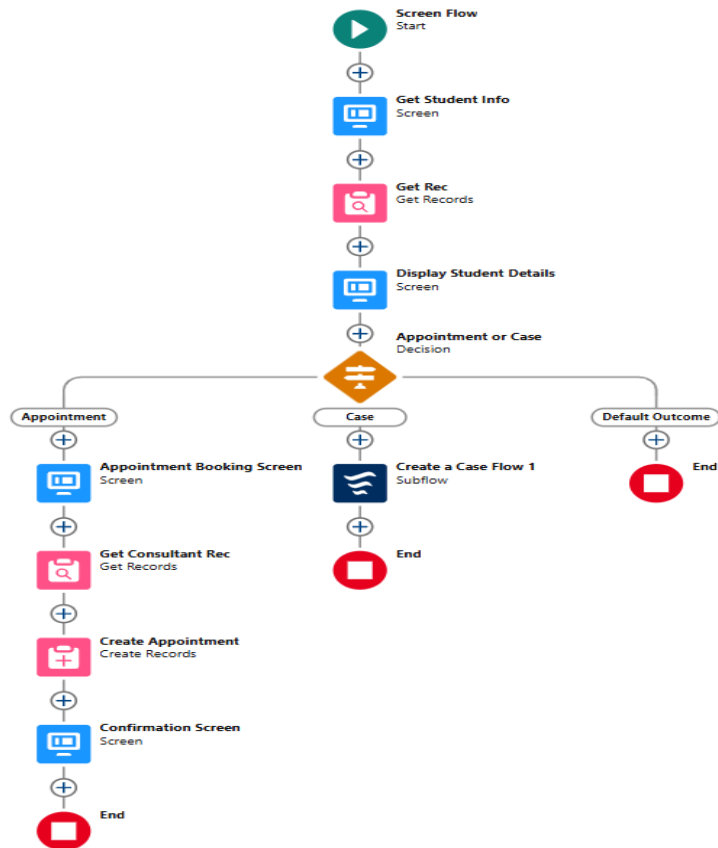
Save & New

Cancel

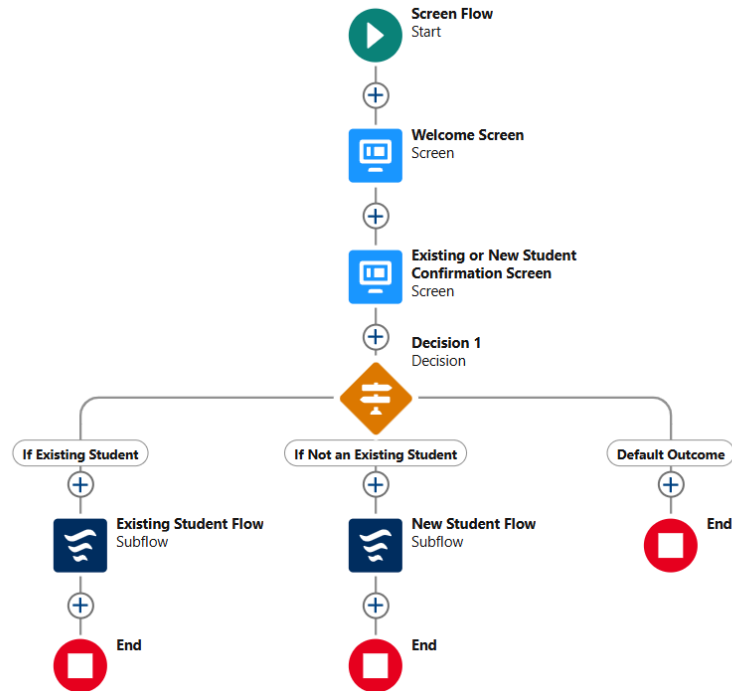
Create a Record Triggered Flow:



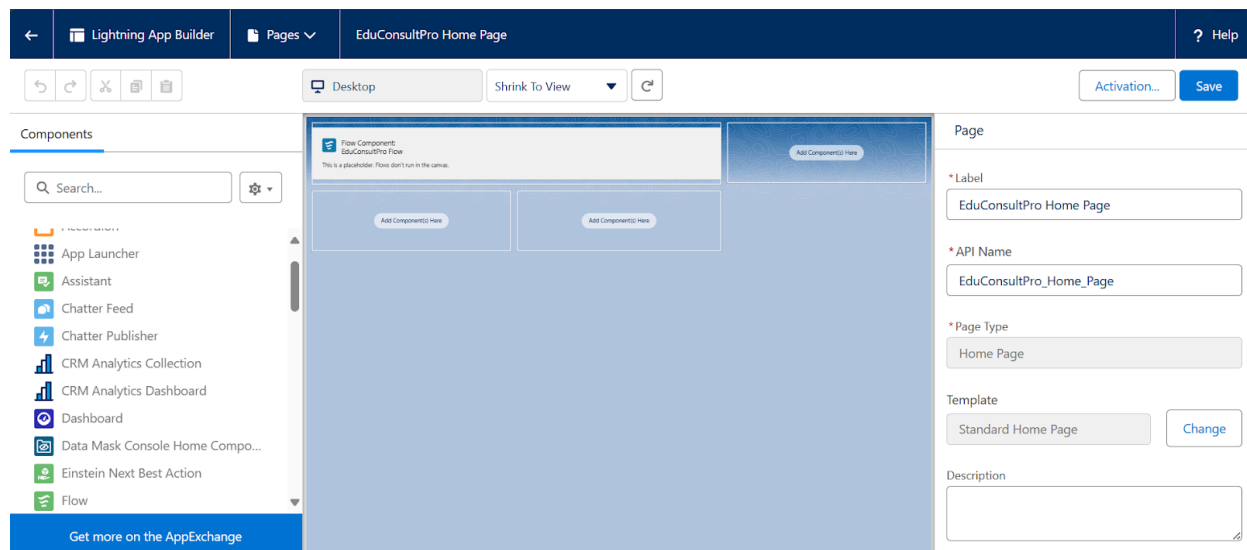
Create a ScreenFlow For Existing Students to Book an Appointment:



Create a ScreenFlow to Combine All the Flows at One Place:



A Lightning App Page:



5. Testing and Validation

The project includes rigorous testing and validation to ensure quality:

- **User Interface Testing: Ensuring usability and functionality for staff and students.**

6. Key Scenarios Addressed by Salesforce in the Implementation Project

Salesforce addresses several scenarios during implementation:

- **Managing a high volume of student enquiries and applications.**
- **Providing timely updates and feedback to prospective students.**
- **Streamlining consulting services through effective case management.**

7. Conclusion

The implementation of Salesforce CRM for EduConsultPro Institute has successfully streamlined the admission and enquiry processes, enhanced the transparency of operations, and provided a seamless experience for both students and staff. This project demonstrates the power of Salesforce CRM in transforming educational services to meet modern demands.