

A CRM Application to Manage the Services offered by an Institution

By

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ABSTRACT

The **EduConsultPro** Institute is one of these leading educational institutes that annually presents a greater quantity of various courses and programs for an increasing quantity of prospective students. The service standards need effective management in admissions management, student inquiries, and expert consulting to keep them in a high position. This project will entail the design and implementation of a comprehensive CRM application using Salesforce to support this process better and improve the experience of students and admissions staff alike. The solution will consist of features in admission application management, consulting services management, and immigration case management, among others.

Admission Application Management will enable prospects to make applications online and for the admission staff to trace and scrutinize the applications through automated notifications. *Consulting Services Management* will help students create their request for expert advice, while consultants can schedule and manage their appointments with much ease. The Immigration Case Management will provide information on immigration-related questions and cases. Some features of this system include automated workflows, email notifications, comprehensive dashboards, and collaboration tools.

EduConsultPro Institute has now revamped pages for their prospective students, which are smooth, transparent, and easily navigated, all made possible through the use of Salesforce CRM. The sole concept, however, is developing operational efficiencies with an increased throughput in the admission process through consulting services. Now, this project aligns not just with things up front but provides a nice platform for scalable and future-fit growth.

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INTRODUCTION

EduConsultPro Institute, a prestigious educational establishment, is committed to improving the management of its admission processes, consulting services, and immigration case handling. As the institute experiences a rise in student applications and service requests, it recognizes the need for a more efficient and integrated solution to address these challenges.

To enhance operational efficiency and provide a seamless experience for both prospective students and admissions staff, EduConsultPro Institute is turning to Salesforce CRM. This initiative will streamline various processes, including the handling of admission applications, consulting requests, and immigration cases, all within a single, cohesive CRM platform.

Task1: Create Objects from Spreadsheet

The outcome is enhanced services management at EduConsultPro Institute for which Salesforce functionality is leveraged to enable creation of objects directly from the spreadsheets. This will make it easier to integrate existing data in Salesforce and effectively manage the same for several institutional requirements.

- **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.

- **Create Remaining objects**

1. Follow the steps which we have followed for course object creation.
2. Use the following sheets for remaining objects

Consultant, Student and Appointment.

- **Create Relationship among the objects**

1. Create 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.

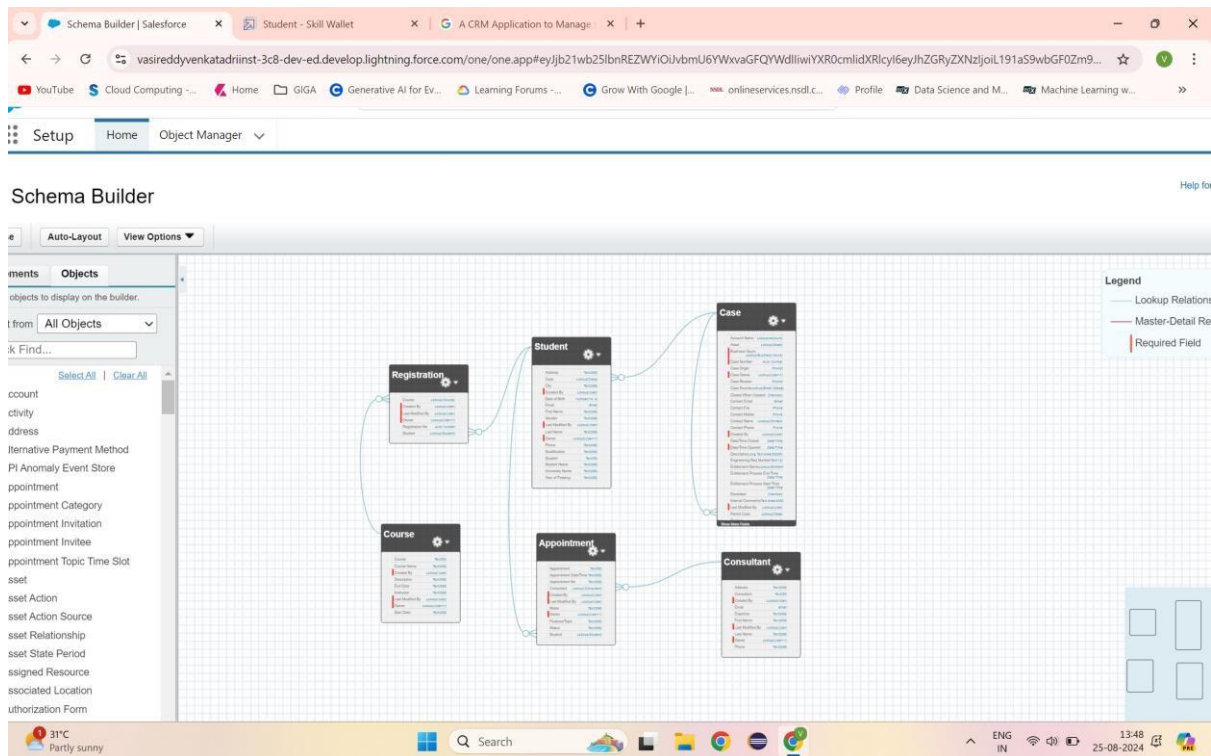
- **Configure the Case Object**

1. Go to object manager, edit 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
- 4.

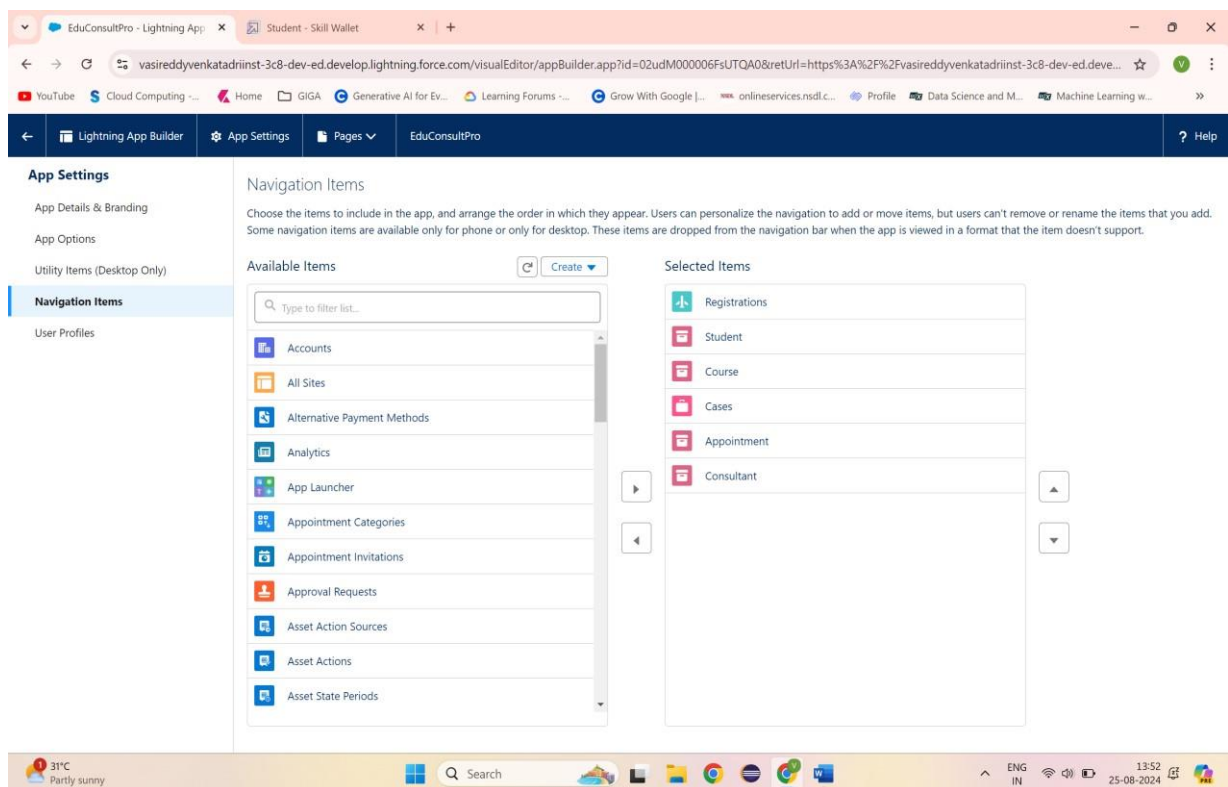
- **Create a Lightning App**

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 "System Administrator" profile from Available Profiles to Selected Profiles, click Save & Finish.

Screenshots:



Lookup relationship among Objects



Adding items to EduConsultPro

Lightning Experience App Manager

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

	App Name ↑	Developer Name	Description	Last Modified D...	App ...	Visi...
1	All Tabs	AllTabSet		22/08/2024, 9:45 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/08/2024, 9:45 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	22/08/2024, 9:45 pm	Classic	✓
4	Automation	FlowsApp	Automate business processes and repetitive tasks.	22/08/2024, 9:49 pm	Lightning	✓
5	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	22/08/2024, 9:47 pm	Lightning	✓
6	Community	Community	Salesforce CRM Communities	22/08/2024, 9:45 pm	Classic	✓
7	Content	Content	Salesforce CRM Content	22/08/2024, 9:45 pm	Classic	✓
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	22/08/2024, 9:45 pm	Lightning	✓
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/08/2024, 9:45 pm	Lightning	✓
10	EduConsultPro	EduConsultPro		23/08/2024, 6:10 am	Lightning	✓
11	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/08/2024, 9:45 pm	Lightning	✓
12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	22/08/2024, 9:45 pm	Classic	✓
13	Platform	Platform	The fundamental Lightning Platform	22/08/2024, 9:45 pm	Classic	✓
14	Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2024, 9:45 pm	Lightning	✓
15	Sales	Sales	The world's most popular sales force automation (SFA) solution	22/08/2024, 9:45 pm	Classic	✓

EduConsultPro Lightning App

Case

Active picklist values: 7 (1,000 max)
Inactive picklist values: 0

Field Dependencies [New](#) [Field Dependencies Help](#)

No dependencies defined.

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

Case Type Picklist Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Case Type Picklist Values Help](#)

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Mechanical	Mechanical	<input type="checkbox"/>	Assigned dynamically	Vedaasi Kurra, 22/08/2024, 9:45 pm
Edit Del Deactivate	Electrical	Electrical	<input type="checkbox"/>	Assigned dynamically	Vedaasi Kurra, 22/08/2024, 9:45 pm
Edit Del Deactivate	Electronic	Electronic	<input type="checkbox"/>	Assigned dynamically	Vedaasi Kurra, 22/08/2024, 9:45 pm
Edit Del Deactivate	Structural	Structural	<input type="checkbox"/>	Assigned dynamically	Vedaasi Kurra, 22/08/2024, 9:45 pm
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	Assigned dynamically	Vedaasi Kurra, 22/08/2024, 9:45 pm
Edit Del Deactivate	Immigration	Immigration	<input type="checkbox"/>	Assigned dynamically	Vedaasi Kurra, 23/08/2024, 6:06 am
Edit Del Deactivate	Visa Application	Visa Application	<input type="checkbox"/>	Assigned dynamically	Vedaasi Kurra, 23/08/2024, 6:06 am

Inactive Values

No inactive values defined.

Configuring the Case Object

Task2: Create a Screenflow for Student Admission Application process

The EduConsultPro Student Flow simplifies the registration process for students by creating a more user-friendly application. I added the Screen element, represented as a "**Student Info**," which was there to carry all the information that pertained to the student. Therefore, I created a record variable known as **StudentRecordRes** to view the fields from the student object and present a very light experience when getting data.

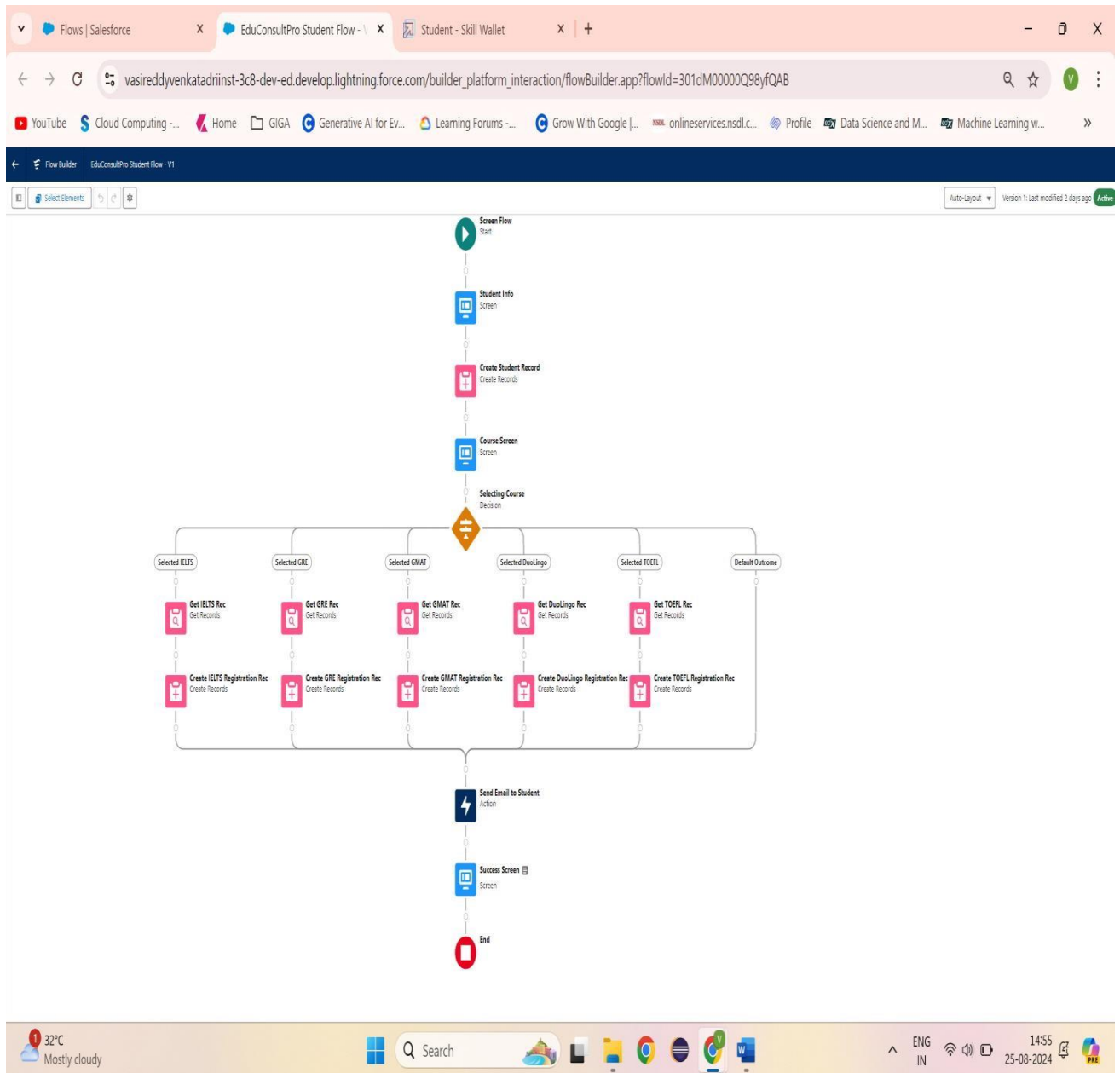
Next, I developed a Create element named "**Create Student Record**" to enable saving the student record input to the Salesforce database. Then I included a "**Course Screen**" by including a second Screen element. The primary choice found in the screen is a picklist named "**Select Course**". The course options that may be selected are *IELTS, GRE, GMAT, Duolingo, and TOEFL*.

Added a Decision element known as "**Selecting Course**" to manage course selection. This checks the course selected and then directs the flow of action regarding the selection. Based on the selection made, under the condition of the choice, a Get Record element gets the related course record from the "**Course**" object so that registration is done correctly.

After collecting the course data that was needed, a Create Records element was leveraged to make a registration record in the "**Registration**" object, associating the selected course with all the information that student gave to me. I then made Text Template Resources for the body and subject of the email to add the message that would be sent to the student ensuring that they had properly registered and sought to join the platform.

I then added an Action element titled "**Send Email to Student**" for sending this email—including the capability to fill in the email with provided student details any time the process is run. To exit the process system, I added an Screen element titled "**Success Screen**" and then added a message, "Registration has been completed successfully," with advice to students to check their emails for details. This flow will be named hence: "**EduConsultPro Student Flow**."

Screenshot:



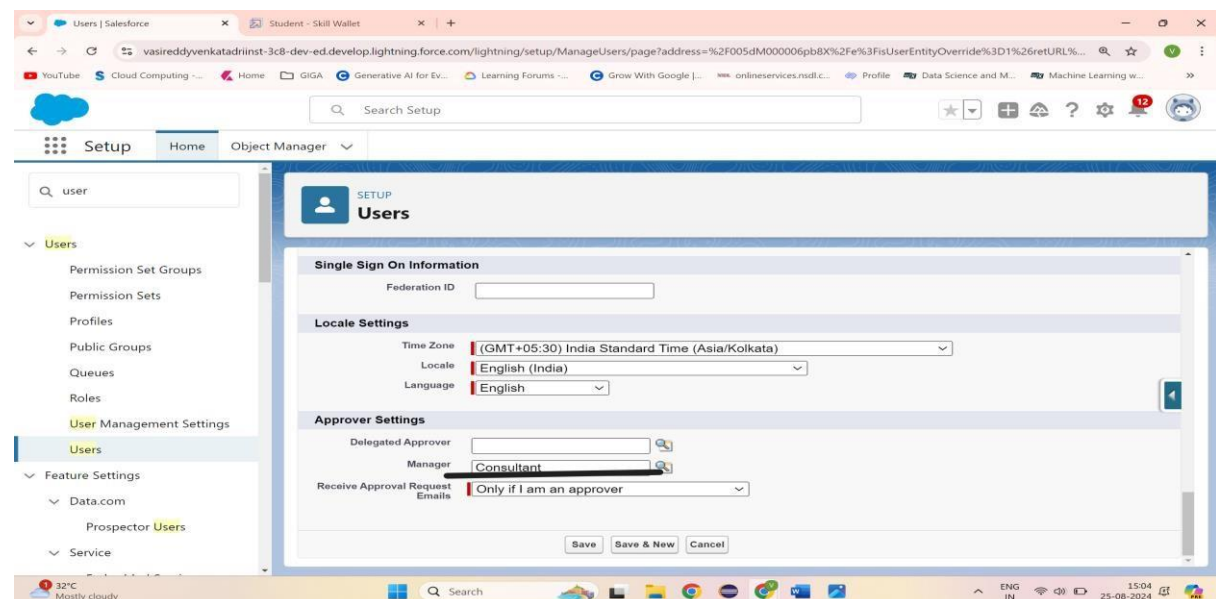
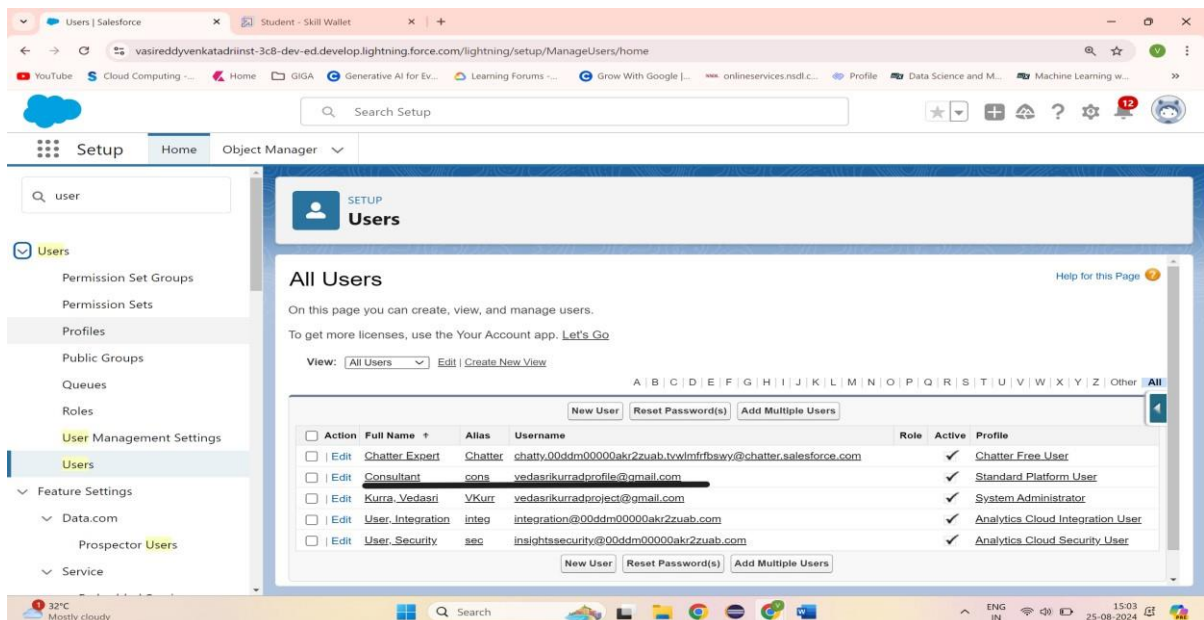
EduConsultPro Student Flow

Task3: Create Users

Created new user in Salesforce by navigating to Setup→Administrative→Users→New User. Entered "Consultant" for the second name and entered "Salesforce Platform" as the license type. I applied the profile "Standard Platform User," checked all required fields for data, and saved the record of the new user.

Configured user settings: Browse to Setup → Administration → Users → Edit the user profile Scrolled down to the Approver Settings section, Selected "Consultant" in the Manager Field, At the bottom of the screen, click Save.

Screenshots:



Task4 : Create an Approval Process for Property Object

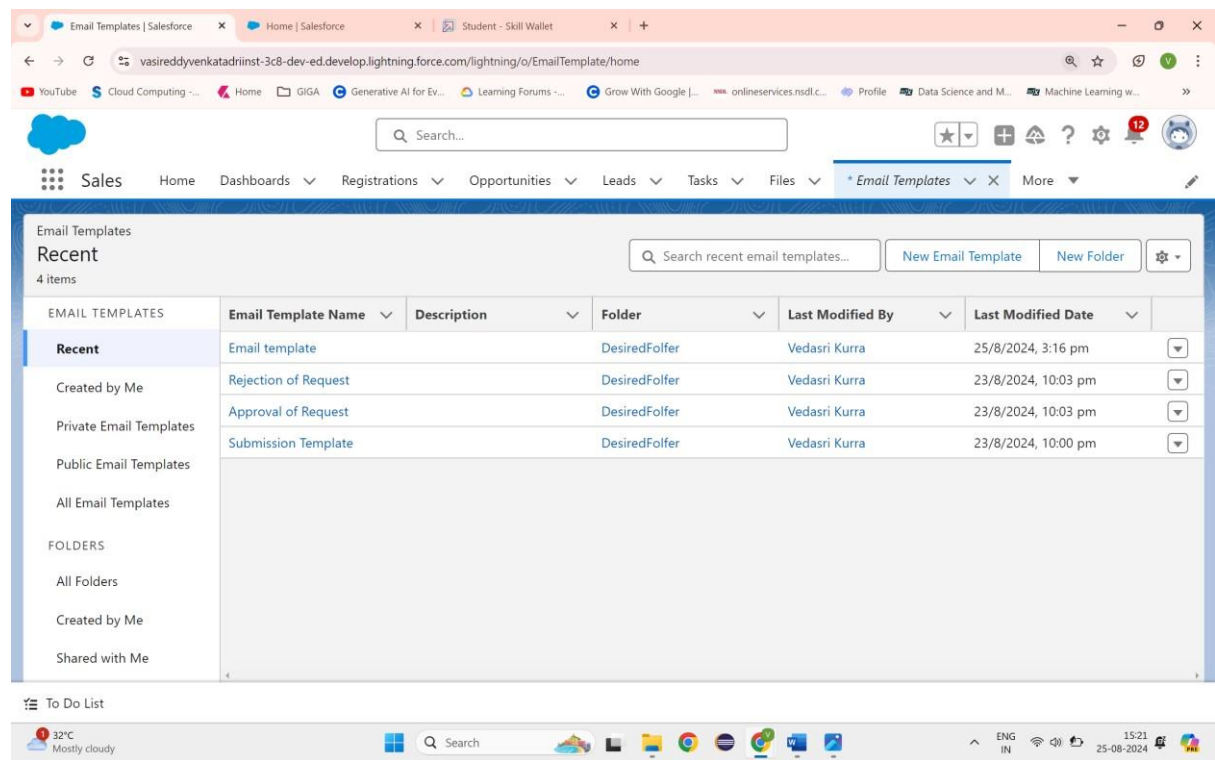
Created email template in Salesforce. From Setup, I input "Templates" in the Quick Find box and clicked on "Lightning Email Templates", and clicked the toggle to on. Opened the App Launcher, searched for "Email Templates" from the search box, and saved. Created a new folder with the desired name. Created a new email Template and selected the new created folder. The specified text got pasted into the HTML Value to create this, in my case, "Submission Template" Designed two more email templates for approving and rejecting requests, ditto the first one.

Earlier, I did set up the approval process. I went to Setup and typed "Approval" in the Quick Find box, and clicked on "Approval Processes." I selected to manage approval processes for "Appointment" and clicked "Create New Approval Process" using the Jump Start Wizard. I named the process "Appointment Approval" and under the approver settings, I used the setting "Option Automatically assign an approver using a standard or custom hierarchy field" of "Manager." I set the "Next Automated Approver Determined By" field to "Manager."

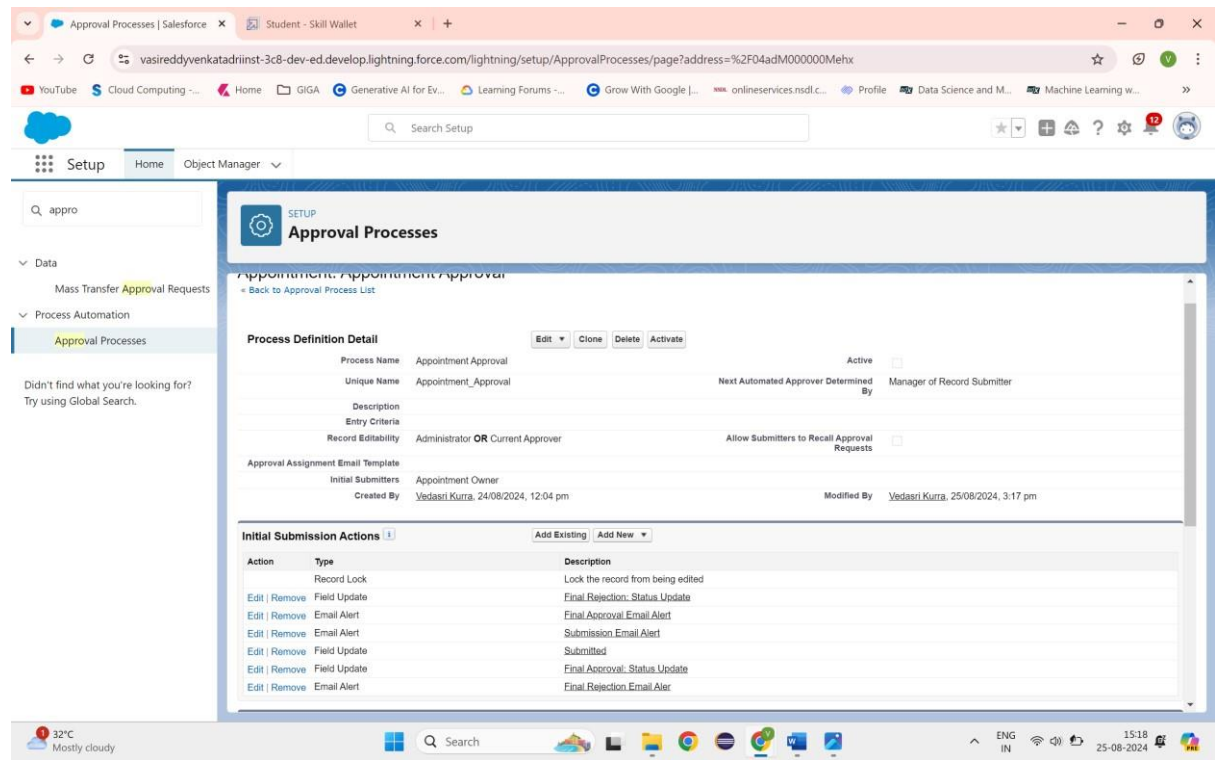
Made the following changes to the Record Editability Properties: Prepend "Administrator OR the currently assigned approver" to the list Saved the process and checked out the form Made a new Field Update under the Initial Submission Actions with Name "Submitted" and configured it to make the update to the field "Appointment: Status" with "Pending"

Also created a new Email Alert type "Submission Email Alert," auto-populate the Unique Name, selected the "Submission Template" Email Template, selected the recipient type to the user's Name. Repeated that for the Final Approval and Final Rejection actions and set those two up the same way.

Screenshots:



Email Template

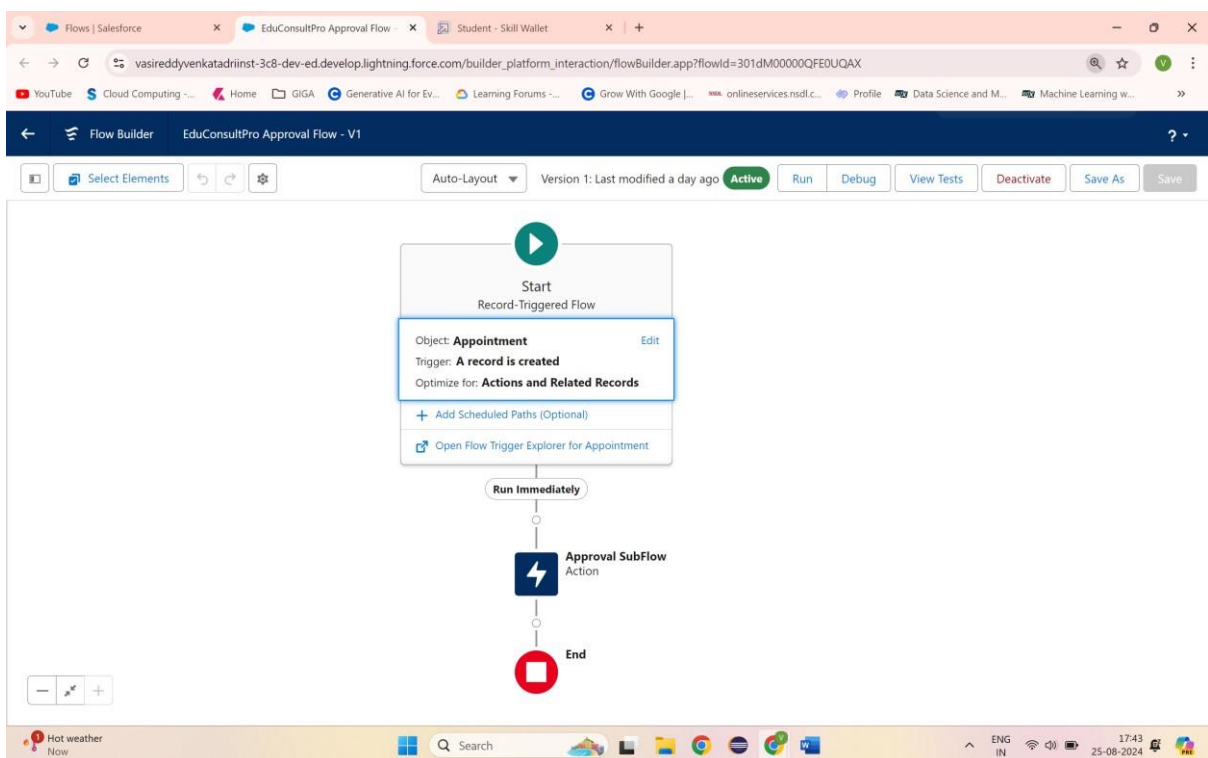


Approval Process

Task5 : Create a Record Triggered Flow

Created a record-triggered flow in Salesforce for appointment approvals. Set the flow trigger to 'When a record is created' on an appointment record and added an action element that would submit the record for approval. Label this Action element as "Approval SubFlow" and set RecordId to "{!\$Record.Id}". At this point, the flow was saved with the label "EduConsultPro Approval Flow" and activated.

Screenshot:



EduConsultPro Approval Flow

Task6 : Create a ScreenFlow for Existing Student to Book an Appointment

Configured an end-to-end flow in Salesforce for student appointments and cases management.

Added a Screen element called "Get Student Info" to collect the student's name and email, and added a GET Record element to retrieve student details depending on the name and email collected.

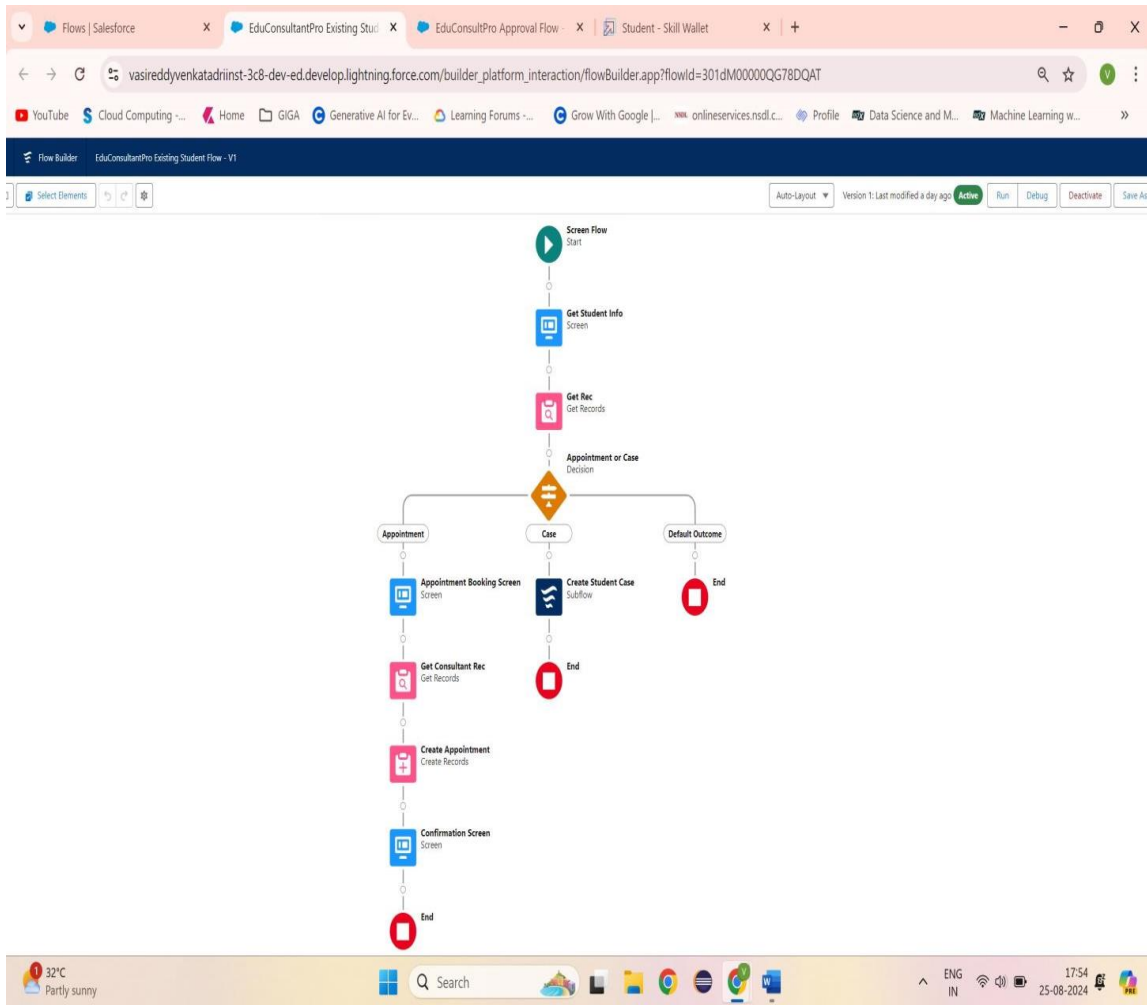
Added a Decision element to route between "Appointment" and "Case" depending upon the student's wishes. Added a Screen element labeled "Appointment Booking Screen" to gather details for appointments in case an appointment has been booked.

Inserted a GET Record element to obtain consultant details based on the selected name of the consultant. Applied a Create Records element to create a new appointment record with appropriate details.

Added a Screen element and named it "Confirmation Screen" to let the student see details of the appointment confirmation.

Added a Subflow element for case management and named it "Create Student Case" for creation of a case. Finally, save the flow as "EduConsultantPro Existing Student Flow" and prepare for deployment.

Screenshot :



EduConsultantPro Existing Student Flow

Task 7: Create a ScreenFlow to Combine all the flows at one place

A new Screen Element in the flow was added labelled as "Welcome Screen".

Inside this screen, a Display Text component was added and was labelled as "SuccessMessage."

Entered the given text into the Resource Picker box so that the welcome message by EduConsultantPro describes the services and support it provided. Added another Screen Element following the Welcome Screen, labeled "Existing or New Student Confirmation Screen."

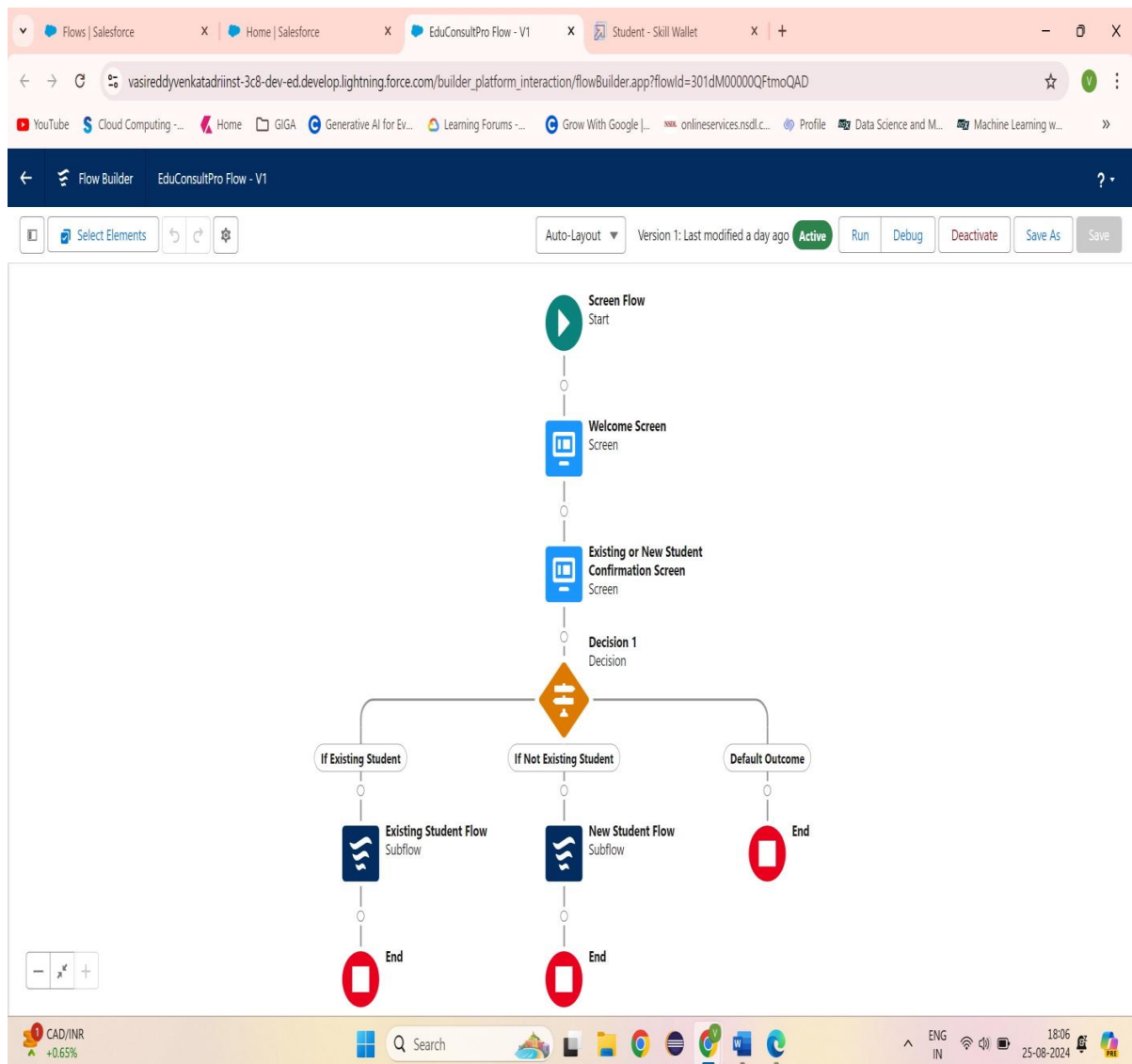
Added a Radio Button component with the label "Are you an Existing Student?" Created two choices: "Yes" and "No." Then added an Action Element of type Decision and named it "Decision 1," placing it next to the Existing or New Student Confirmation Screen. Set up the decision criteria with the outcome labeled "If Existing Student." The condition will be when the resource

{!Are_you_a_Existing_Student} is equal to the value {!Yes}. Added the second outcome for "No."

Inserted a Subflow Element in the "If Existing Student" path and selected "EduConsultantPro Existing Student Flow" and labelled it as "Existing Student Flow." Saved the flow under the name "EduConsultantPro Existing Student Flow."

Inserted another Subflow Element in the "If Not an Existing Student" path, selecting the "EduConsultantPro Student Flow" and labeling it "New Student Flow." Saved this flow with the name "EduConsultPro Flow." Finalized by saving the entire flow, naming it "EduConsultPro Flow."

Screenshot:



Task 8: Create a lightning app page

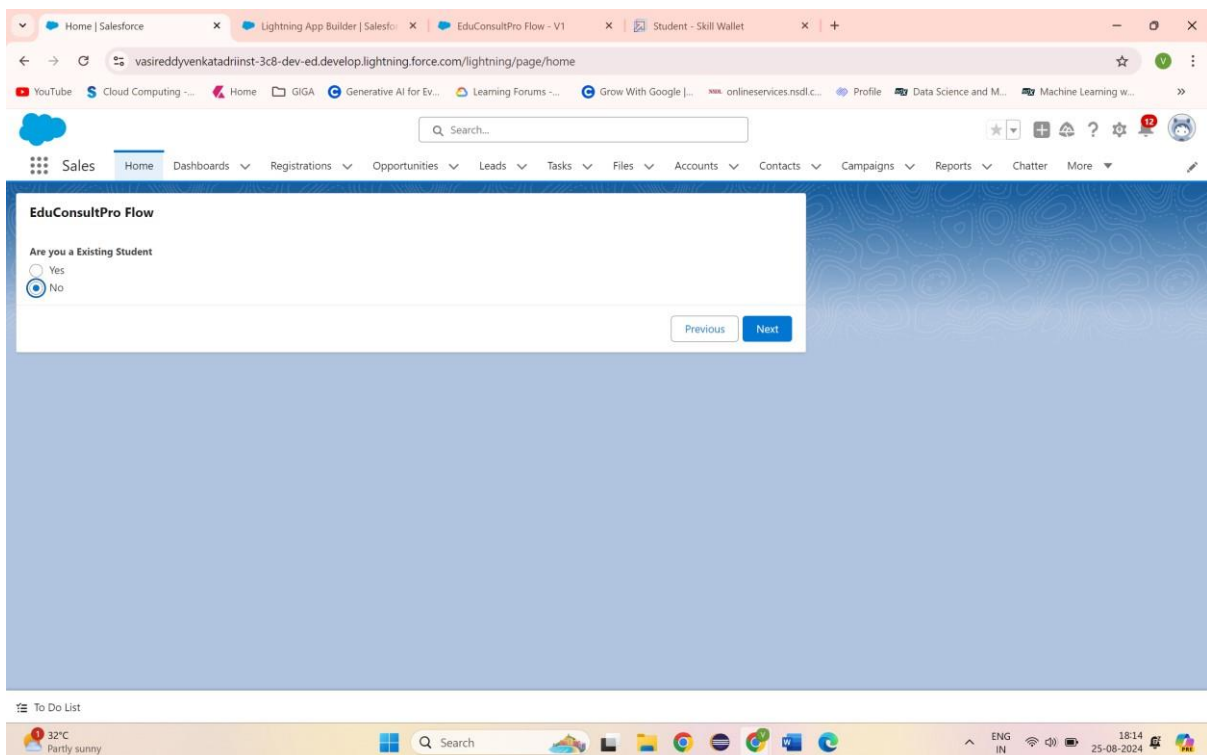
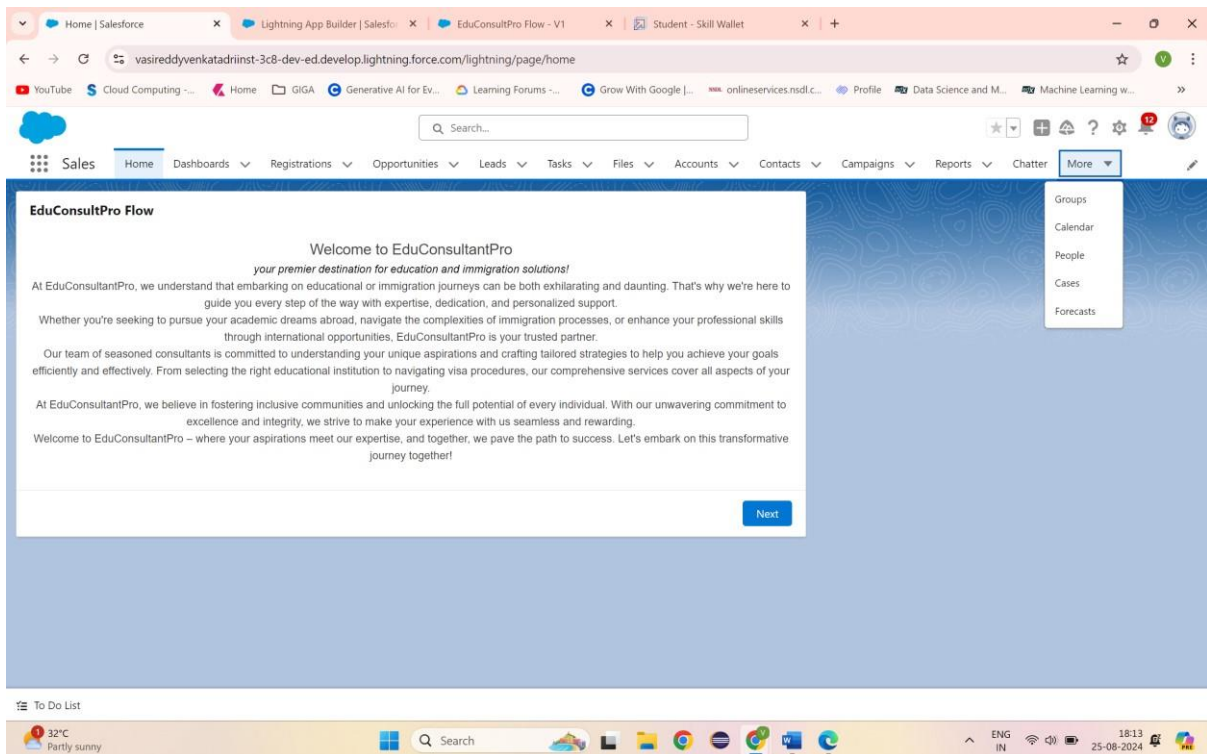
Created and configured a Lightning App Page named "EduConsultPro Home Page" using the Standard Home Page template. Placed the Flow component in the top-right region and incorporated the "EduConsultantPro Flow." Activated the page and assigned it to the Sales app and the System Administrator profile, ensuring it was available for the designated users.

Screenshots:

The screenshot displays the Salesforce Lightning App Builder interface. The browser window shows several tabs, with the active tab being 'Lightning App Builder | Salesforce'. The address bar indicates the URL is 'vasireddyvenkatadriinst-3c8-dev-ed.develop.lightning.force.com/lightning/setup/FlexiPageList/home'. The Salesforce Setup page is visible, with a left sidebar containing navigation links. The main content area is titled 'Lightning App Builder' and includes a description of the tool. Below the description is a table of 'Lightning Pages'.

Action	Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
Edit Clone Del	EduConsultPro Home Page	EduConsultPro_Home_Page			Home Page	YKurt, 24/08/2024, 5:18 pm	YKurt, 24/08/2024, 5:19 pm

Execution Screenshots:



Home | Salesforce Lightning App Builder | Salesforce EduConsultPro Flow - V1 Student - Skill Wallet

vasireddyvenkatadriinst-3c8-dev-ed.develop.lightning.force.com/lightning/page/home

YouTube Cloud Computing ... Home GIGA Generative AI for Ev... Learning Forums ... Grow With Google ... onlineservices.nsdl.c... Profile Data Science and M... Machine Learning w...

Search...

Sales Home Dashboards Registrations Opportunities Leads Tasks Files Accounts Contacts Campaigns Reports Chatter More

EduConsultPro Flow

Address

City

Year of Passing

University Name

Student Name

Qualification

Phone

Student

Last Name

To Do List

32°C Partly sunny Search 18:14 25-08-2024

Home | Salesforce Lightning App Builder | Salesforce EduConsultPro Flow - V1 Student - Skill Wallet

vasireddyvenkatadriinst-3c8-dev-ed.develop.lightning.force.com/lightning/page/home

YouTube Cloud Computing ... Home GIGA Generative AI for Ev... Learning Forums ... Grow With Google ... onlineservices.nsdl.c... Profile Data Science and M... Machine Learning w...

Search...

Sales Home Dashboards Registrations Opportunities Leads Tasks Files Accounts Contacts Campaigns Reports Chatter More

7993850387

Student IT Leaders

Last Name Kurra

Gender Female

First Name Veda Sri

Email kurravedasri@gmail.com

Date of Birth

Case

Search Cases...

+ New Case

Previous Next

To Do List

32°C Partly sunny Search 18:16 25-08-2024

New Contact

* = Required Information

Contact Information

Contact Owner: Vedasri Kurra

Phone:

Home Phone:

* Name

Salutation:

First Name:

* Last Name:

Account Name:

Mobile:

New Case

* = Required Information

Case Information

Case Owner: Vedasri Kurra

* Status:

Case Number:

Priority:

Contact Name:

* Case Origin:

Account Name:

Type:

☐ Send notification email to contact

Home | Salesforce Lightning App Builder | Salesforce EduConsultPro Flow - V1 Student - Skill Wallet

vasireddyvenkatadriinst-3c8-dev-ed.develop.lightning.force.com/lightning/page/home

Search...

Sales Home Dashboards Registrations Opportunities Leads Tasks Files Accounts Contacts Campaigns Reports Chatter More

7993850387

Student

IT Leaders

Last Name

Kurra

Gender

Female

First Name

Vedasri

Email

kuravedasri@gmail.com

Date of Birth

Case

00001026

Previous Next

To Do List

32°C Partly sunny

Search

ENG IN 18:18 25-08-2024

Home | Salesforce Lightning App Builder | Salesforce EduConsultPro Flow - V1 Student - Skill Wallet

vasireddyvenkatadriinst-3c8-dev-ed.develop.lightning.force.com/lightning/page/home

Search...

Sales Home Dashboards Registrations Opportunities Leads Tasks Files Accounts Contacts Campaigns Reports Chatter More

EduConsultPro Flow

Select Course

Duolingo

Previous Next

To Do List

32°C Partly sunny

Search

ENG IN 18:18 25-08-2024

THANKYOU