

Frankfinn Project work



Project Background

Frankfinn is one of the premier vocational training institutes in India. Since its inception in 1993, it has been consistently growing and is today recognized as the World's No. 1 airhostess training institute. It is the only institute / academy in India with an exclusive worldwide tie-up with ICM – an institute of repute in UK and having an international presence.

Project Challenges

With the multiple branches, Frankfinn institute faces the problem in managing the leads while the franchisees find it difficult to manage and share the leads with other franchisee branches. In order to prevent the loss of lead and convert them into opportunity in future, they devise to manually assign the leads to marketing executives. The cumbersome process creates the problem in managing campaigns while the leads generated from campaign also gets lost.

The approaches of legacy systems are not getting enough to leverage the solutions and therefore, the enterprise is needed an enhanced customization of the standard system.

- ✔ **Campaign Management:** Here, management can manage all the campaign and add either existing contacts or leads to this campaign as Campaign Member, or can upload a file consisting of contacts or leads in the Salesforce. Further, one can also track total lead generation, leads conversion, total opportunities and number of won opportunities.
- ✔ **Lead Management**
It allows to track and save the leads from varied sources with required information. Further, the Auto Lead Assignment also gives the feature to assign the lead to any given user. In the next stage if the Lead status is changed then it will be automatically assigned to the concerned department or person until it finally closes as “Closed Won Opportunity”.
- ✔ **Opportunity Management**
Here opportunity can be tracked based on different fields available. From here you one can also add the products available for that opportunity. It also provides facility to track all stages of opportunity until it reaches the “Closed Won” or “Closed Lost” Stage.
- ✔ **Product Management**
All the product to be are kept here along with its details and standard price. one can maintain different price books for different clients or different purpose with which he can have more than one price for that particular product.
- ✔ **Reports and Dashboard**
One may want to generate a report of the leads based on its Status, and from these kinds of reports a user can also have the dashboard which gives the same report a graphical presentation in the form of Bar Charts, Pie Charts Line Charts, funnel or etc. There are five kinds of reports available like.
 - o Lead by Status.
 - o Lead by Source.
 - o Lead by Owner.
 - o Lead by Centre Interested.
 - o Lead by Course.
- ✔ **Salesforce Security**
There is built-in security to protect data and applications while own security scheme can also be implemented to reflect the structure and needs of organization. There are multiple level of security like:
 - o Object level
 - o Record Level
 - o Field Level
 - o Organization Wide Defaults
 - o Profiles
 - o Permission Sets
 - o Roles
 - o Sharing Rules

Indexing :✔

Indexing is implemented to give the feasibility of reaching out to the required information or section with a single click. User will be shown the list of objects wherefrom he/she can access the desired object and perform actions.