

A CRM Application To Manage The Services Offered By Institution

By

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Project Abstract

EduConsultPro Institute, a prominent educational institution known for its wide range of courses and programs across various fields, is experiencing significant growth in the number of prospective students seeking admission. This increase has highlighted several challenges in managing the admission process, student inquiries, and consulting services efficiently. The current manual processes are time-consuming, prone to errors, and lead to delays, causing frustration for both students and staff. To address these challenges and streamline operations, EduConsultPro Institute has decided to implement Salesforce CRM. The comprehensive project will focus on automating the admission application process, implementing an approval workflow for consulting requests, managing consulting services and appointments, and tracking immigration cases. By leveraging the robust capabilities of Salesforce CRM, EduConsultPro Institute aims to significantly enhance the experience for prospective students and improve operational efficiency for admission.

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1. Requirements

1.1 Admission Application Management

Prospective students can fill out and submit their admission applications on the institute's website. Once submitted, their details are stored in Salesforce CRM. Students will receive an automatic email confirming their application, and Admissions staff can use Salesforce to generate reports and dashboards to analyse metrics like application volume, acceptance rates, and enrolment trends.

1.2 Approval Process for Consulting Requests

In Salesforce, create an approval process to review and approve consulting requests. Set up email alerts to notify students of their request's approval or rejection. Ensure that each consulting request is automatically submitted as soon as it is created.

1.3 Consulting Services Management

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Students can request consulting services through the institute's website. The request form collects their details, preferences, and needed expertise. Submitted requests are recorded in Salesforce CRM, and consultants receive automatic notifications. Consultants can view, accept, and manage these requests in Salesforce, including scheduling and tracking appointments.

1.4 Immigration Case Management

Students can start immigration cases via phone, email, or online. The details are captured in a form and stored in Salesforce CRM. Automated emails notify immigration agents of new cases. Agents can view, process, and track cases in Salesforce, with statuses updated as the case progresses. Document management tools are also integrated for efficient case processing and communication.

2. Creating Objects from Spreadsheets

Objects in Salesforce are database tables that allow you to store data specific to your organization. Each object comprises records (rows) and fields (columns) that help organize and structure your data efficiently. We use objects to manage and relate various types of information, enabling seamless data tracking, reporting, and analysis within the Salesforce platform.

To create objects from spreadsheets in Salesforce, follow these steps:

- **Prepare Your Spreadsheet** : Organize your spreadsheet data so that each column corresponds to a field in Salesforce, and each row represents a record. Ensure the data is clean and well-structured.
- **Save the Spreadsheet** : Save the file in a compatible format, typically as a CSV (Comma Separated Values).
- **Log in to Salesforce** : Access your Salesforce account and navigate to the Setup menu.
- **Use the Data Import Wizard** : In the Setup menu, locate and open the Data Import Wizard. Choose the standard or custom object you want to create records for.
- **Upload Your Spreadsheet** : Follow the wizard's instructions to upload your CSV file, mapping the spreadsheet columns to the appropriate Salesforce fields.

Start the Import : Review the mappings, then begin the import process. Salesforce will create records based on the data in your spreadsheet, enabling you to manage and analyse the information within the platform.

Create a custom object from a spreadsheet

Define object and fields

Choose the data source, map fields and their types, and import field data.

CSV File Details

Encoding Format: Unicode (UTF8) Values Separated By: Comma Field Label Source: Enter manually
Field Labels Row: 1 Import 5 rows of Data? No, skip import
Record Name Field: Let Salesforce Create a Default R

Fields 5 of 5 to import Hide mapped fields

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS	FIELD PREVIEW
Course Name	Course Name	Text	<input checked="" type="checkbox"/>	IELTS
Description	Description	Text Area	<input checked="" type="checkbox"/>	Let's Learn IELTS
Start Date	Start Date	Date	<input checked="" type="checkbox"/>	03-01-2024
End Date	End Date	Date	<input type="checkbox"/>	05/31/2024
Instructor	Instructor	Text	<input checked="" type="checkbox"/>	Sandeep

Back Next

2.1-Create Course Object :

Course Object : It Stores detailed information about each course, such as its description, duration, and associated instructors, enabling efficient tracking and management of educational services.

1.Navigate to Object Manager

- Log in to your Salesforce instance.
- Go to the Object Manager tab in Salesforce setup.

2.Create Object from Spreadsheet

- Click on "Create Object from Spreadsheet."
- Download the Course spreadsheet via the provided link.
- Upload the downloaded file to Salesforce.

3.Map Fields

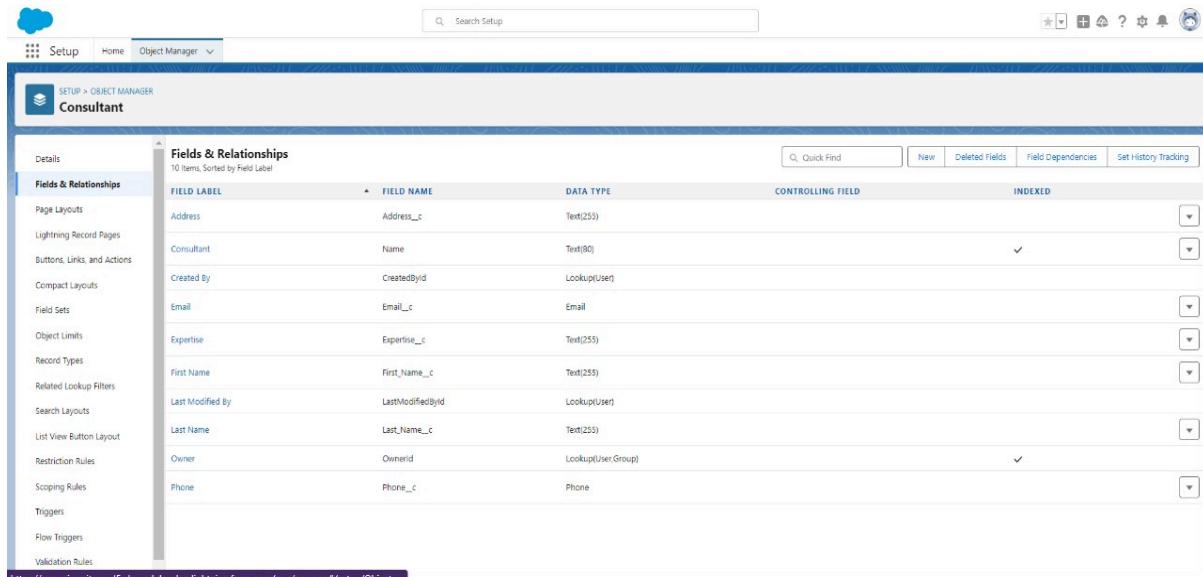
- Map the fields from the spreadsheet to the Salesforce object fields.
- Review and finalise the field mapping.
- Upload the data to create the Course object.

The screenshot shows the Salesforce Setup page with the 'Object Manager' tab selected. On the left, a sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' for the 'Course' object. It displays a table of fields with columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED status. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course	Name	Text(80)		✓
Course Name	Course_Name__c	Text(255)		
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(131072)		
End Date	End_Date__c	Date		
Instructor	Instructor__c	Text(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		
Start Date	Start_Date__c	Date		

2.2-Create Remaining Objects :

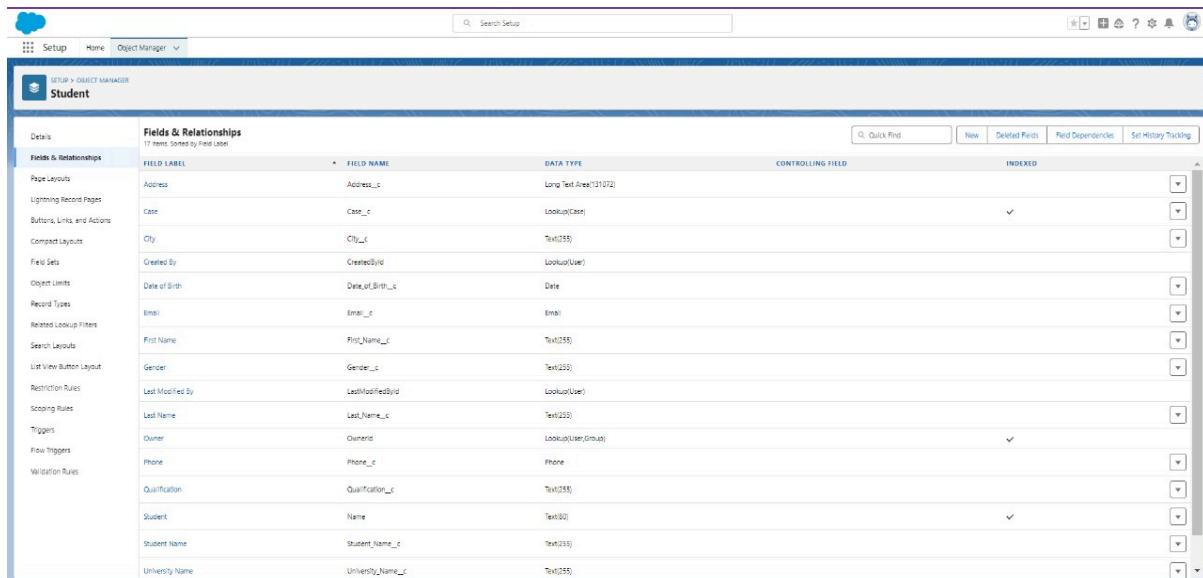
Consultant Object : It Stores details about consultants, including their expertise, availability, and assigned courses, to manage and allocate resources effectively.



The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' and displays 10 items sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED status. Fields listed include Address, Consultant, Created By, Email, Expertise, First Name, Last Modified By, Last Name, Owner, and Phone.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(255)		
Consultant	Name	Text(80)		
Created By	CreatedById	Lookup(User)		✓
Email	Email_c	Email		
Expertise	Expertise_c	Text(255)		
First Name	First_Name_c	Text(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Last Name	Last_Name_c	Text(255)		
Owner	OwnerId	Lookup(User Group)		✓
Phone	Phone_c	Phone		

Student Object : It Contains detailed student information, including enrolment records, contact details, and course registrations, enabling efficient tracking and personalized communication.



The screenshot shows the Salesforce Object Manager interface for the 'Student' object. The left sidebar lists various setup options. The main content area is titled 'Fields & Relationships' and displays 11 items sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED status. Fields listed include Address, Case, City, Created By, Date of Birth, Email, First Name, Gender, Last Modified By, Last Name, Owner, Phone, Qualification, Student, Student Name, and University Name.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Long Text Area(31072)		
Case	Case_c	Lookup(Case)		
City	City_c	Text(255)		
Created By	CreatedById	Lookup(User)		
Date of Birth	Date_of_Birth_c	Date		
Email	Email_c	Email		
First Name	First_Name_c	Text(255)		
Gender	Gender_c	Text(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Last Name	Last_Name_c	Text(255)		
Owner	OwnerId	Lookup(User Group)		✓
Phone	Phone_c	Phone		
Qualification	Qualification_c	Text(255)		
Student	Name	Text(80)		
Student Name	Student_Name_c	Text(255)		
University Name	University_Name_c	Text(255)		

Appointment Object : Oversees scheduled meetings or sessions by tracking key details such as date, time, participants, and purpose, ensuring smooth and efficient coordination between students and consultants.

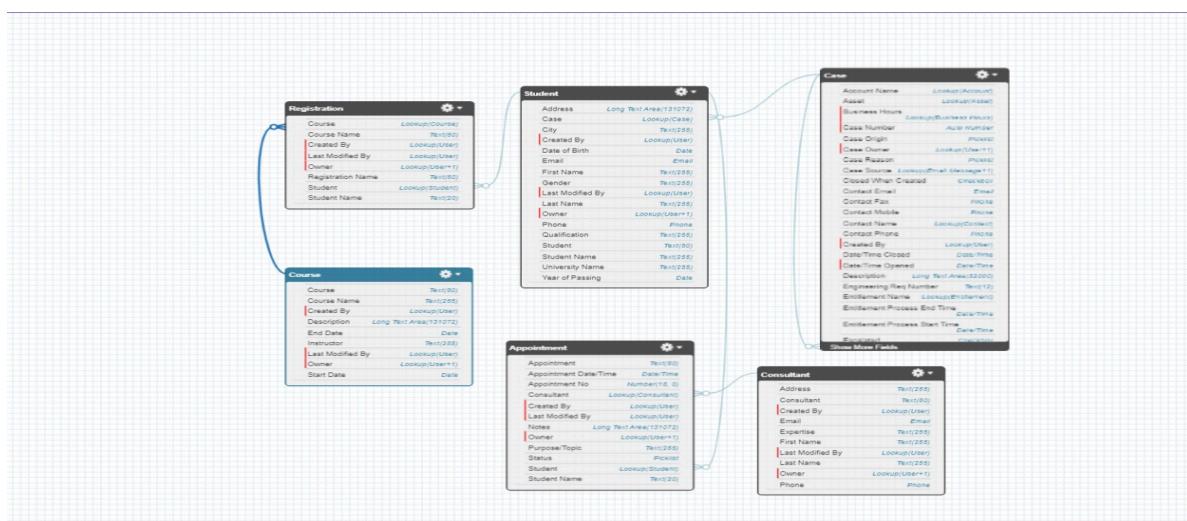
The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. On the left, a sidebar lists various setup options like Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main area displays the 'Fields & Relationships' section with 12 items. Each item includes a field label, field name, data type, controlling field, and indexed status. The fields listed are:

- Appointment (Name, Text(80), Text(80))
- Appointment Date/Time (Appointment_DateTime_c, Date/Time)
- Appointment No. (Appointment_No__c, Number(10, 0))
- Consultant (Consultant__c, Lookup(Consultant))
- Created By (CreatedById, Lookup(User))
- Last Modified By (LastModifiedById, Lookup(User))
- Notes (Notes_c, Long Text Area(131072))
- Owner (Owner, Lookup(User/Group))
- Purpose/Topic (PurposeTopic__c, Text(255))
- Status (Status_c, Picklist)
- Student (Student__c, Lookup(Student))
- Student Name (Student_Name__c, Text(20))

2.3-Create Relationship Among the Objects : It refers to establishing connections between different objects in a Salesforce database. These relationships define how the data in one object relates to data in another, enabling you to link records across objects for better organization, data integrity, and reporting.

In this Includes :

1. **Lookup Relationships:** Link each appointment to a specific student and also link each appointment to a specific consultant.
2. **Create a Registration Object:** Stores details about students and their course enrolments.
3. **Create a Lookup:** Link Student and Case to store the student queries for immigration or visa application.



2.4-Configure the Case Object :

It involves customising the Case object in Salesforce to fit your organization's needs.

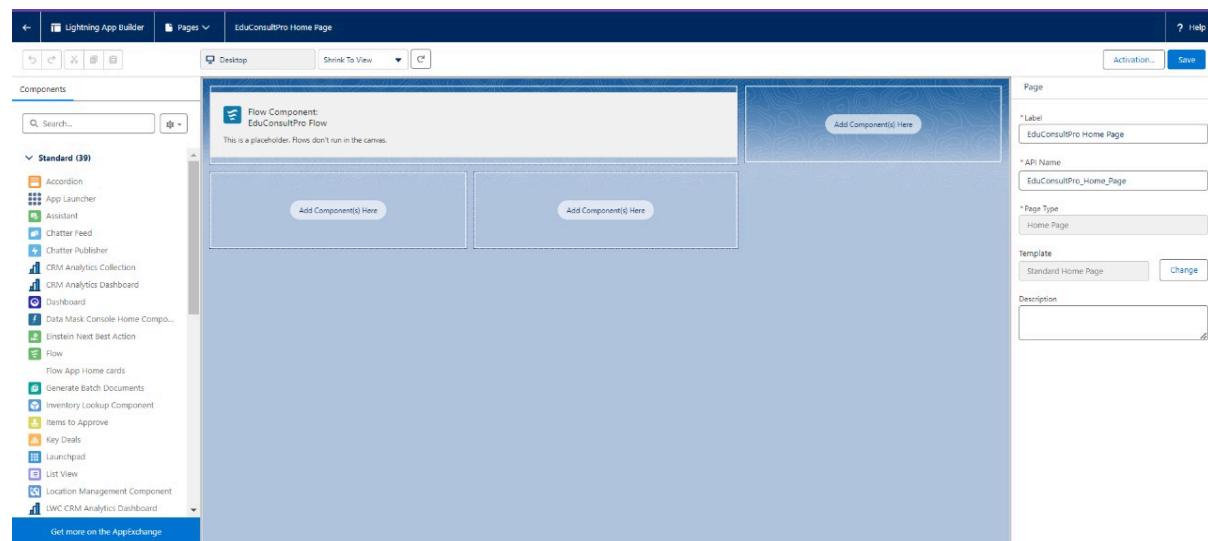
This typically includes:

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

2.5 - Create a Lightning App :

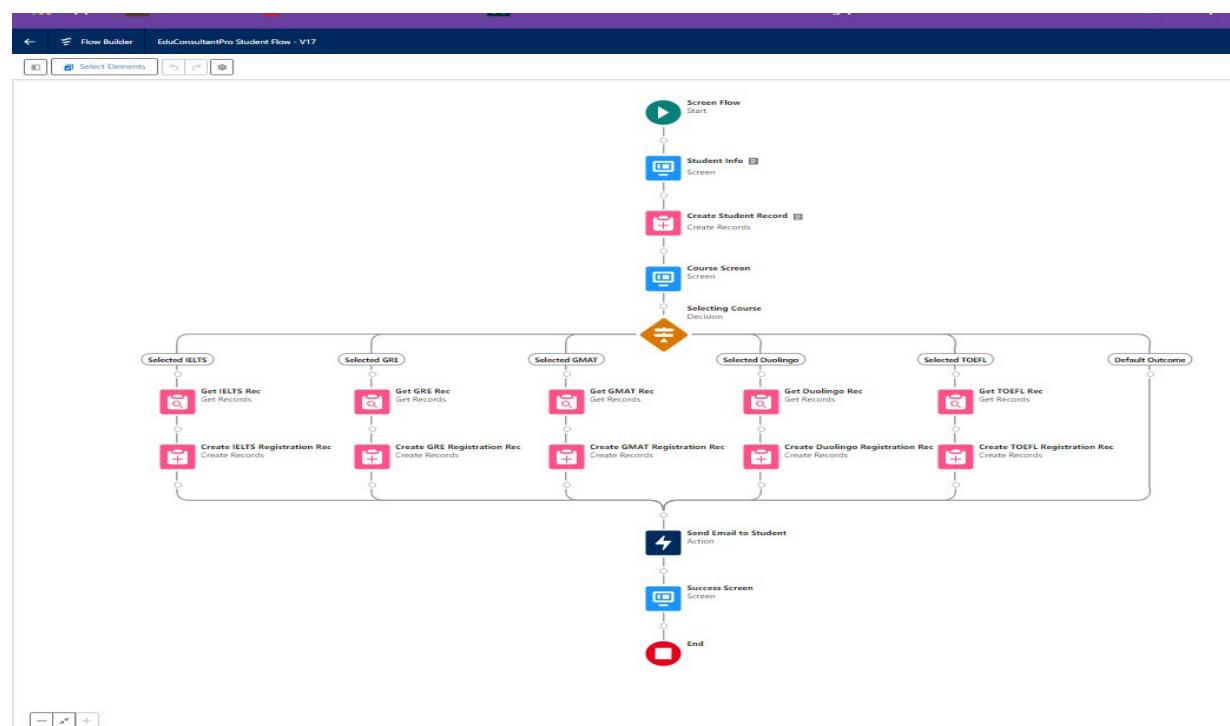
A Lightning App in Salesforce is a custom application built using the Lightning Experience interface. It allows users to group related features, objects, and components into a cohesive, personalized workspace.

1. Go to Setup, search for "App Manager" in Quick Find.
2. Click on "New Lightning App."
3. Enter the app name as "EduConsultPro," then click Next, Next, Next.
4. Add Home, Students, Courses, Consultants, Appointments, Registrations, and Cases from Available Items to Selected Items.
5. Add the "System Administrator" profile from Available Profiles to Selected Profiles, then click Save & Finish.



3. Create a Screen Flow For Student Admission Application Process

The ScreenFlow for the Student Admission Application Process is a powerful tool in your CRM application designed to manage the services offered by an institution. It streamlines the entire admission process by automating data collection, course selection, and record creation. This automation reduces manual data entry errors, saves time, and ensures a consistent process for all applicants. It also allows for immediate feedback and communication with prospective students, improving their overall experience. By centralising and organizing data, the institution can more efficiently manage student information more efficiently, track admissions, and provide tailored educational services. This leads to enhanced operational efficiency and better service delivery.



3.1-Student Info Screen:

- Open Flow Builder and start a new Screen Flow.
- Add a Screen element labelled "Student Information."
- Create a record variable named "StudentRecordRes" to capture all fields from the Student object. Drag required fields (like name, email, etc.) from the Student object to the screen to collect student information.

3.2-Create Student Record :

- After the "Student Information" screen element, drag and drop a "Create Records" element onto the canvas and name it "Create Student Record."
- Select "One" for the number of records to create.
- Choose "Use all values from a record" for setting the record fields.
- Choose the "StudentRecordRes" record variable created in the previous screen to create the new Student record. Save the configured element.

3.3- Course Selection Screen :

- After the "Create Student Record" element, drag and drop a "Screen" element onto the canvas and label it as "Course Screen."
- From the left side panel, drag a picklist component onto the screen and label it as "Select Course."
- Under choices, type "IELTS" and press enter to create a variable named IELTS. Repeat the process for "GRE," "GMAT," "Duo lingo," and "TOEFL."
- Save your changes.

3.4-Decision and Get Rec Elements :

- Drag and drop a "Decision" element onto the canvas after the "Course Screen" element.
- Label this element as "Selecting Course."
- Under "Outcomes," create the first outcome and label it "Selected IELTS."
- Configure the condition as:
 1. **Resource:** Select_Course (the picklist component from the "Course Screen" element)
 2. **Operator:** Equals
 3. **Value:** IELTS (the choice variable from the "Course Screen" element)
- Click the "+" icon to add more outcomes.
- Repeat the configuration from Step two for each of the following options:
 1. GRE
 2. GMAT
 3. DuoLingo
 4. TOEFL
- Once all outcomes are configured, click "Done" to complete the setup of the "Selecting Course" Decision element, and Save your changes.
- After the "Selecting Course" Decision element, under the IELTS path, drag and drop a "GET Record" element.
- Label this element "Get IELTS Rec."
- **Object:** Select "Course."
- **Condition Requirements:** Set to "All Conditions are Met (AND)."

- **Configure Field:** Set "Course Name" as the field, "Equals" as the operator, and the value to {!Select_Course}. For each of the other paths (GRE, GMAT, DuoLingo, TOEFL), repeat the steps to configure GET Record elements:
- Adjust the label to correspond to the course (e.g., "Get GRE Rec," "Get GMAT Rec," etc.).
- Use the same "Course" object and set the "Course Name" field condition accordingly.
- Save the configured elements to ensure all paths and conditions are correctly set up.

3.5-Creating Registration Records :

- After the "Get IELTS Rec" element, add a "Create Records" element labelled "Create IELTS Registration Rec."
- **Configuration:**
 1. **Records to Create:** Select "One."
 2. **Field Setting:** Choose "Use separate resources and literal values."
 3. **Object:** Set to "Registration."
 4. **Fields:** Course_Name_c: {!GetIELTS_Rec.Id}, Student_Name_c: {!StudentRecordRes.Id}

Repeat the above steps for GRE, GMAT, TOEFL, and DuoLingo paths, adjusting labels accordingly (e.g., "Create GRE Registration Rec").

3.6 Send Confirmation Emails :

- After all Decision paths, add an Action element labelled "Send Email to Student."
- **Configuration:**
 1. **Body:** {!StuRegistrationEmailTextTempBody}
 2. **Recipient Address List:** {!StudentRecordRes.Email_c}
 3. **Subject:** {!StuRegistrationEmailTextTempSub}
- After the email Action, add a Screen element labelled "Success Screen."
- Drag a "Display Text" component, label it "SuccessMessage," and add the Success text in the Resource picker box.
- Click "Done" and save the flow as "EduConsultPro Student Flow."

4. Creating Users and Configuring User Settings

Creating Users: Setting up individual accounts in Salesforce, including details like name, email, and profile, to grant access and define permissions.

Configuring User Settings: Customizing user access, roles, and personal settings in Salesforce to ensure appropriate data visibility and functionality based on their job requirements.

4.1-User Creation :

Go to Setup → Administration → Users → New User, Enter the following details :

Last Name: Consultant, License: Salesforce Platform, Profile: Standard Platform

User, Fill in all mandatory fields and Click Save.

4.2 -Approval Settings :

Go to Setup → Administration → Users, Click Edit next to your name, Scroll down to the bottom and, under Approver Settings, select “Consultant” in the Manager field and Click Save.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A specific user record for 'Consultant' is being edited. The 'General Information' section contains fields for First Name, Last Name (set to 'Consultant'), Alias ('cons'), Email ('consultant@gmail.com'), Username ('samconsultant@gmail.com'), Nickname ('consu'), Title, Company, Department, and Division. To the right of these fields are dropdown menus for 'Role' (set to '<None Specified>'), 'User License' (set to 'Salesforce Platform'), and 'Profile' (set to 'Standard Platform User'). Below these are checkboxes for 'Active' (checked), 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User'. At the bottom of the page, there are sections for 'Data.com User Type' (set to '<None>'), 'Accessibility Mode (Classic Only)', 'High-Contrast Palette on Charts', 'Load Lightning Pages While Scrolling' (checked), 'Debug Mode', and 'Make Setup My Default Landing Page'.

5.Approval Process For Appointment Object

5.1 Email Template

Enable Lightning Email Templates : Now,we implemented a structured approach to managing email templates in Salesforce:

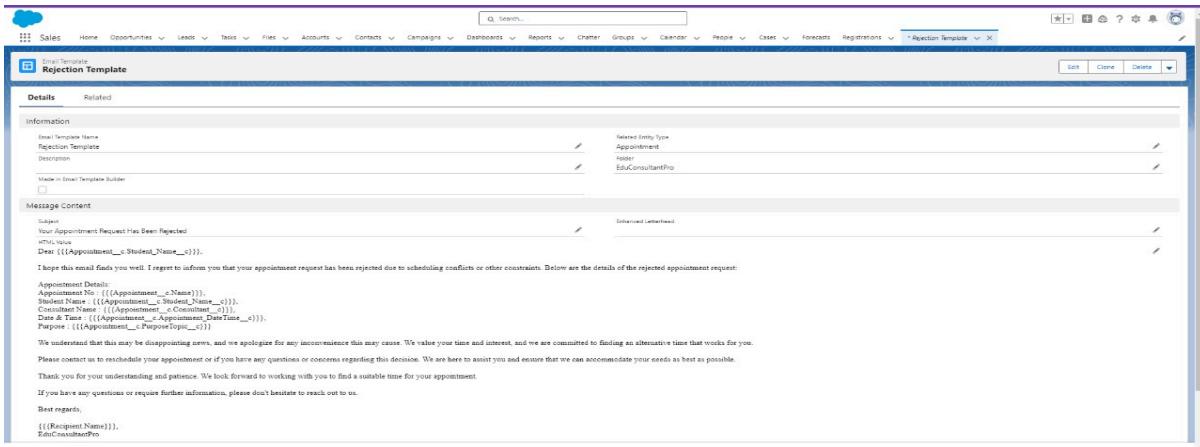
Enable and Create Lightning Email Templates:

- Go to Setup,Enter "Templates" in the Quick Find box and select Lightning Email Templates and click Toggle the feature on.
- Open the App Launcher and search for "Email Templates",Click Create New Folder, name the folder, and click Save.
- Click New Email Template,Choose the folder created earlier,Name the template "**Submission Template**".Enter the content in the HTML Value field and Click Save.
- Repeat the process to create two more templates:
 - One for **Approval**,One for **Rejection**,enter content for each template accordingly.Save each template

1)Submission Template :

2)Approval Template :

3) Rejection Template :



5.2 Approval Process Configuration:

To create a new approval process in Salesforce. Initially, Go to Setup and Enter "approval" in the Quick Find box and select Approval Processes.

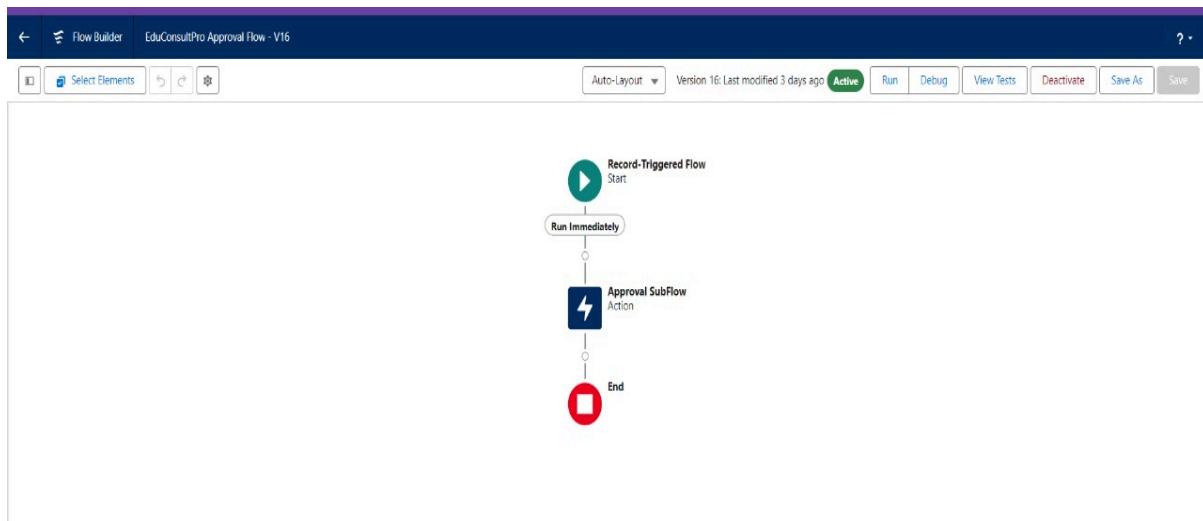
- Set the Process Name to "Appointment Approval."
- Configure Approvers Under Select Approver, choose Manager for the option: "Automatically Assign an Approver Using a Standard or Custom Hierarchy Field."
- Record Auditability Properties, choose Administrators or the Assigned Approver Can Edit Records During the Approval Process.
- Save the Approval Process

Configure Initial Submission Actions: Click View Approval Process Detail Page, Under Initial Submission Actions, Click Add New: Choose Field Update And Configure It With The Necessary Values, and also Click Add New Again And Select Email Alert:

- Description: Enter "submission Email Alert."
- Unique Name: This Will Auto-populate.
- Email Template: Choose "submission Template."
- Recipient Type: Select Your Name. Click Save.

Configure Final Actions : Repeat the same process for Final Rejection Actions, Add Appropriate Field Updates And Email Alerts For Each Action. Use Suitable Descriptions, Email Templates, And Recipient Types.

6. Create A Record Triggered Flow



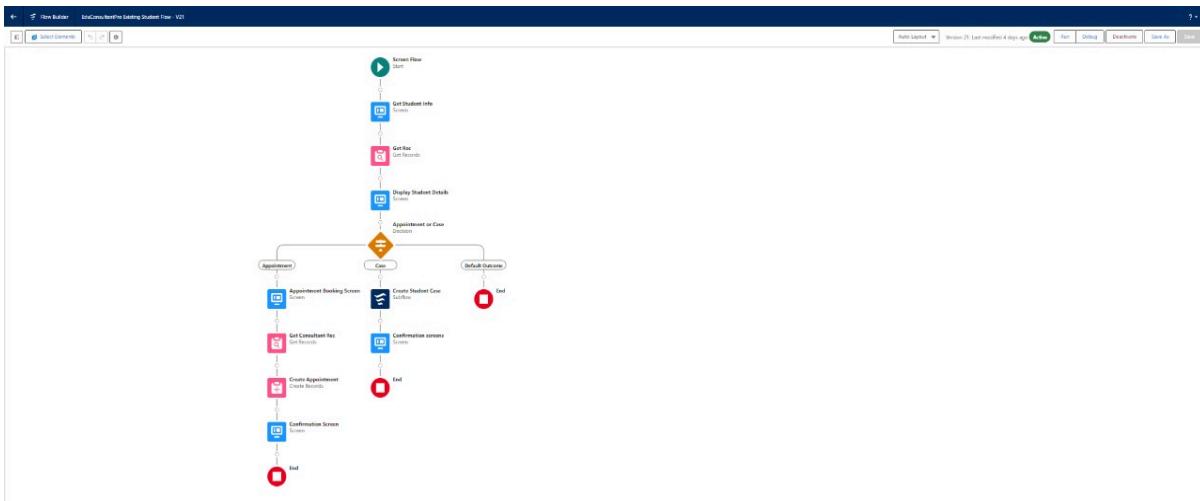
6.1 Configure The Start Element:

- Click on the gear icon in the top-right corner of Salesforce and select "Setup." In the Quick Find box on the left side of the Setup page, type "flows." Click on "Flows" under the "Process Automation" section.
- On the Flows page, click the "New Flow" button. Select "Record-Triggered Flow" from the list of flow types. Click the "Create" button to start building your flow. You will be prompted to configure the Start element of your flow. For the "Object" field, choose "Appointment" from the dropdown menu.
- This specifies that the flow will trigger on changes to Appointment records. Select "A Record Is Created" to specify that the flow should run whenever a new Appointment record is created.

6.2-Add An Action Element :

- Drag and drop an Action element onto the flow canvas after the Start element.
- Select the "Submit for Approval" action and label it as "Approval Subflow."
- Set the Record ID field to "{!\$record.Id}." Save the flow with the label "unconsulted Approval Flow" and click Activate.

7.Create a ScreenFlow for Existing Student to Book an Appointment



To create a Screen Flow for existing students to book an appointment in Salesforce :

7.1-Get Student Info Screen :

- From Setup, enter “Flow Builder” in the Quick Find box,Select “New Flow” and choose “Screen Flow”,Click “+” Add Element and Select “Screen” from the list of elements.
- In the Screen Properties pane, set the Label to “Get Student Info”,Drag and drop two “Text” components from the left side panel onto the screen,Label the first Text component as “Enter Student Name”,Label the second Text component as “Enter Student Email.” Click “Done” to save the screen configuration.

7.2-Get Record Elements :

- After the Decision element, under the IELTS path, click “+ Add Element.” Select “Get Records” and label it as “Get Rec”.
- Configure the GET Record Element for Object: Select “Student.” and Condition Requirement : Choose “All Conditions are Met (AND).”
- Set Conditions for Field: Student Name,Operator: Equals and Value: `{!Enter_Student_Name}`

Field: Email__c,Operator : Equals,Value: `{!Enter_Student_Email}`

7.3-Add Decision Element :

- Add a Decision Element after Select Display Student Details Element, label it as “Appointment or Case”.
- 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}`, Click on the “+” icon and Repeat for case.

7.4-Add Screen Element :

- Add a Screen element after the Decision Element, on the Appointment path, and label it as "**Appointment Booking Screen**".
- 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.Drag all the fields which are needed to add on the screen in order to collect the student information.

7.5>Create Appointment Record using Create Records Element

Add a Create element after the Get Consultant Rec element and label it as "**Create Appointment**".Select "one" under How many records to Create, and select "Use separate resources and literal values" under How to Set the record fields.

Select Object : Appointment

1. **Field** : Appointment_DateTime__c
Value : {!AppointmentRecordRes.Appointment_DateTime__c}
2. **Field** : Consultant__c
Value : {!Get_Consultant_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}

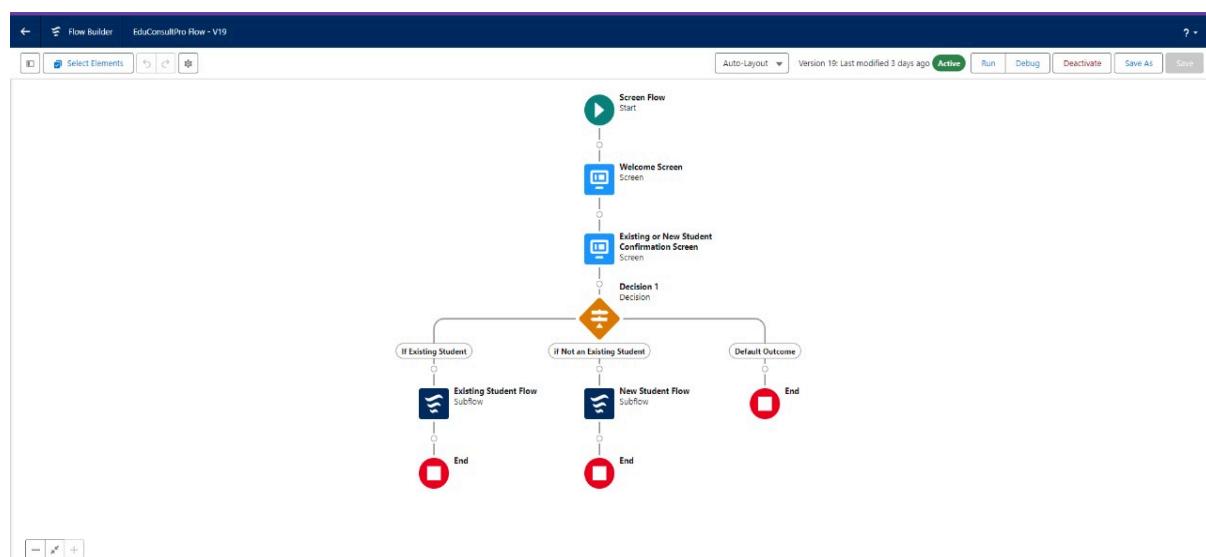
7.6-Add Screen Element :

- After the "Send Email to Student" Action element, click the "+ Add Element" button,Select "Screen" from the list of elements,Label the Screen element as "Confirmation Screen".From the Left Side Panel Search for the "Display Text" component and drag it onto the main panel of the Screen element.Label the Display Text Component Enter "Appointment_Confirmation" as the label.
- Set Up the Display Text :
Consultant Name: {!Get_Consultant_Rec.Name}
Date & Time:{!AppointmentRecordRes.Appointment_DateTime__c}
Notes: {!AppointmentRecordRes.Notes__c}
- Click "Done" to save the configuration of the Screen element.

7.7-Add an SubFlow Element:

1. 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**”.
2. Save the flow and label it as “**EduConsultantPro Existing Student Flow**”, you can use the below image for reference.

8. Create a ScreenFlow to Combine all the flows at one place



8.1-Add Screen Element :

- Go to the Flow Builder where you’re working on your Salesforce FlowIn the left side panel, find the "Elements" s
- section,Drag and drop the "Screen" element into the main panel. Click on the new added Screen element. In the properties pane on the right, set the "Label" to "Welcome Screen".
- Inside the "Welcome Screen" configuration, locate the "Display Text" component in the left side panel under "Components".
- Drag and drop the "Display Text" component onto the main panel of the Screen element.Click on the Display Text component you just added.In the properties pane on the right, set the "Label" to "SuccessMessage".Enter the text you want to display in the "Text" field, Save your changes to the Flow.Ensure to connect this Screen element appropriately with other elements in your Flow as needed.

8.2-Add Screen Element

- Go to the Flow Builder where you are working on your Salesforce Flow. In the left side panel, find the "Elements" section. Drag and drop the "Screen" element onto the main panel, placing it after the existing "Welcome Screen" element.
- Click on the new added Screen element. In the properties pane on the right, set the "Label" to "Existing or New Student Confirmation Screen".
- Inside the "Existing or New Student Confirmation Screen" configuration, locate the "Radio Buttons" component in the left side panel under "Components". Drag and drop the "Radio Buttons" component onto the main panel of the Screen element.
- Click on the Radio Buttons component you just added. In the properties pane on the right, set the "Label" to "Are you an Existing Student". Click on "Add Choice" to create a new choice. In the input field that appears, type "Yes". Click "Create Yes choice" to add this choice to the radio buttons. Repeat step six to add another choice with the label "No".
- Click "Create No choice" to add this choice to the radio buttons. Click "Done" to finalise the configuration of the Screen element.
- Save your changes to the Flow.
- Ensure you connect this Screen element appropriately with other elements in your Flow as needed.

8.3-Add Decision Element :

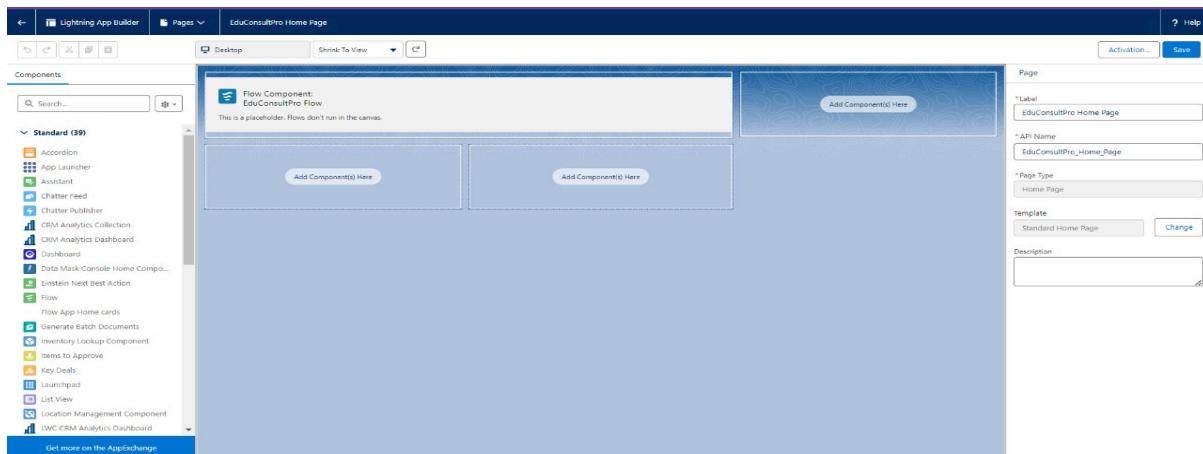
- After the "Existing or New Student Confirmation" Screen Element, click the "+" icon.
Select "Decision" from the menu. Label this Decision element as "Decision 1."
- In the Outcomes section, click "Add Outcome." Label the Outcome: Enter "If Existing Student." Set Condition :Resource:
`{!Are_you_a_Existing_Student}`, Operator: Equals, Value: `{!Yes}`, Click the "+" icon to add another outcome
- Enter "If Not Existing Student." and Set Condition:
 - **Resource:** `{!Are_you_a_Existing_Student}`
 - **Operator:** Equals
 - **Value:** `{!No}`
- Double-check the outcomes and conditions to ensure they are correctly configured. Click "Done" to save the Decision element configuration.

8.4-Add an SubFlow

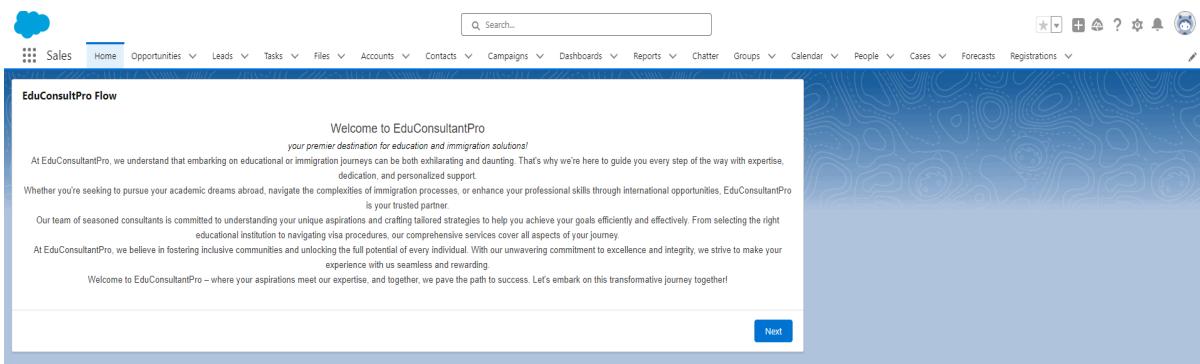
- Go to the Flow Builder where you are working on your Salesforce Flow. Find the "Elements" section in the left side panel.
- Drag and drop the "Sub flow" element onto the main panel, placing it after the "Decision 1" element on the "Existing Student" path. Click on the Subflow element you just added.
- In the properties pane on the right, click on the "Sub flow" dropdown to search and select the "EduConsultantPro Existing Student Flow". Set the "Label" to "**Existing Student Flow**". Save your changes to the Flow, Label the Flow as "**EduConsultantPro Existing Student Flow**"
- Click "Done" to finalise the configuration of the Sub flow element.
- Ensure the Sub flow element is connected appropriately with other elements in your Flow as needed.

9. Creating a Lightning App Page

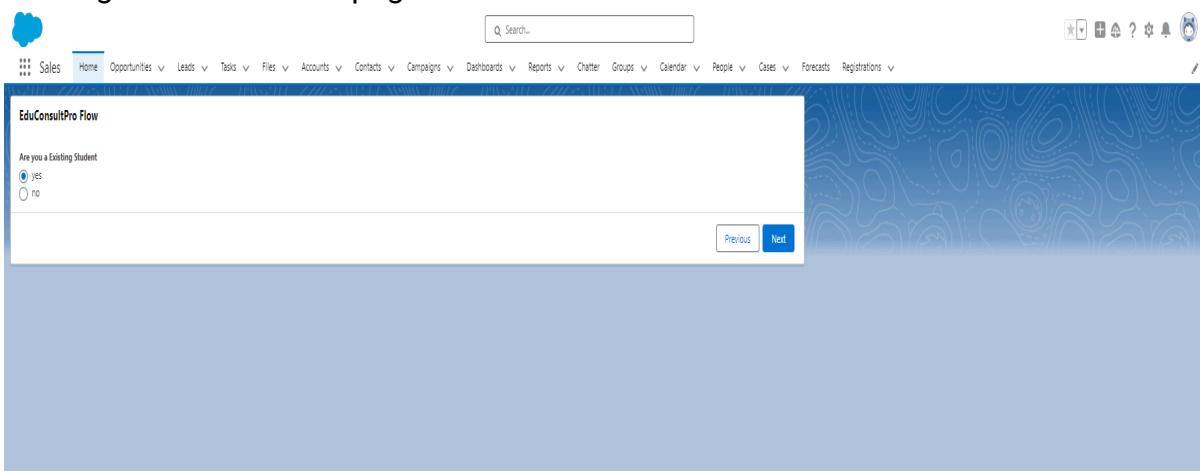
- From Setup, type App Builder in the Quick Find box and select Lightning App Builder. Click NewChoose Home Page and click Next.
- Name the page "EduConsultPro Home Page", select the Standard Home Page template, and click Done. Drag the Flow component to the top-right region of the page layout. Search for "EduConsultantPro Flow" in the component list.
- Click Save and Activate. Choose an App and Profile, then click Assign to Apps and Profiles.
- Select the Sales app and click Next. Scroll through the profiles and select System Administrator, then click Next, Review the assignment, and click Save.



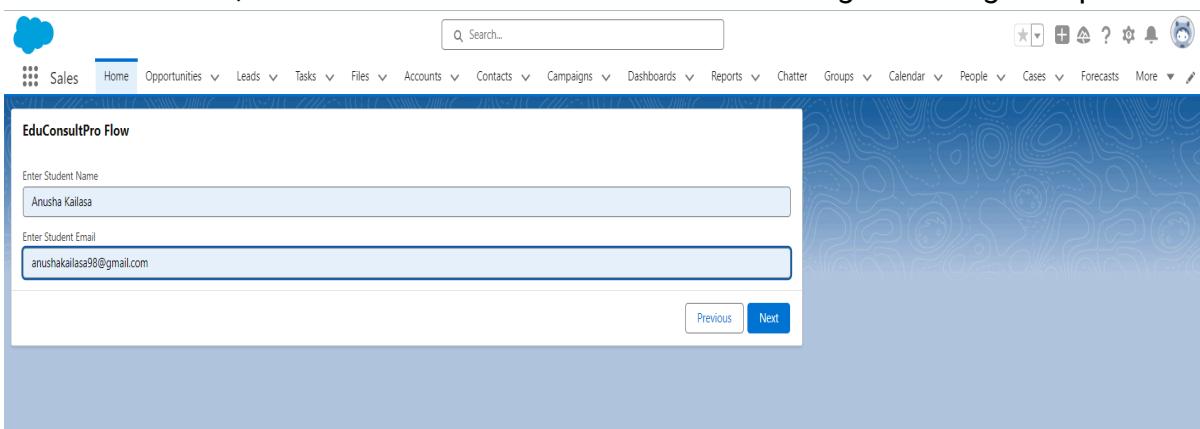
10. OUTPUT :



The "**EduConsultPro Flow**" within a CRM application designed for managing the educational and immigration services. The flow guides users through the process, starting with a welcome page.

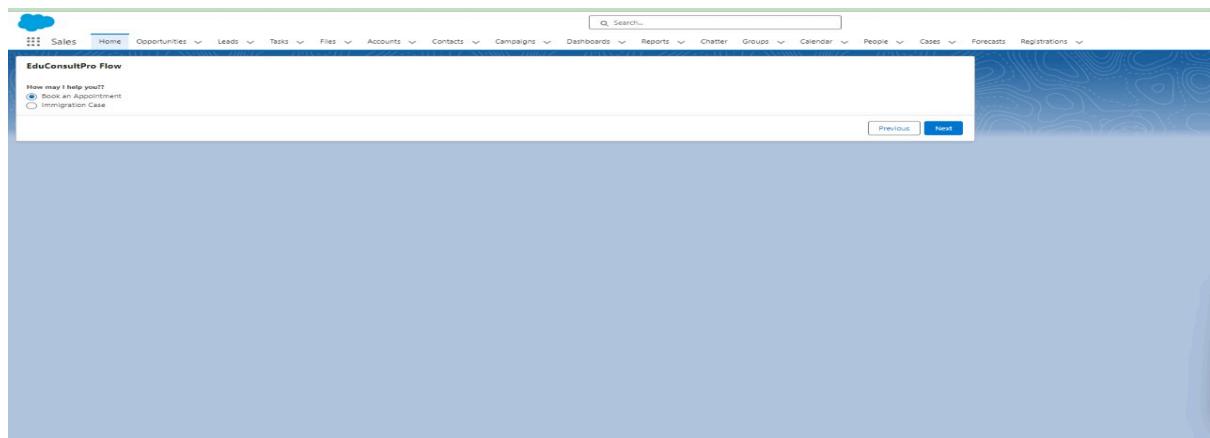


This Flow asks, "**Are you an Existing Student?**" with two options, either "**Yes**" or "**Number**". Depending on the selection, the user can either update existing records or create new ones, with "**Previous**" and "**Next**" buttons to navigate through the process.

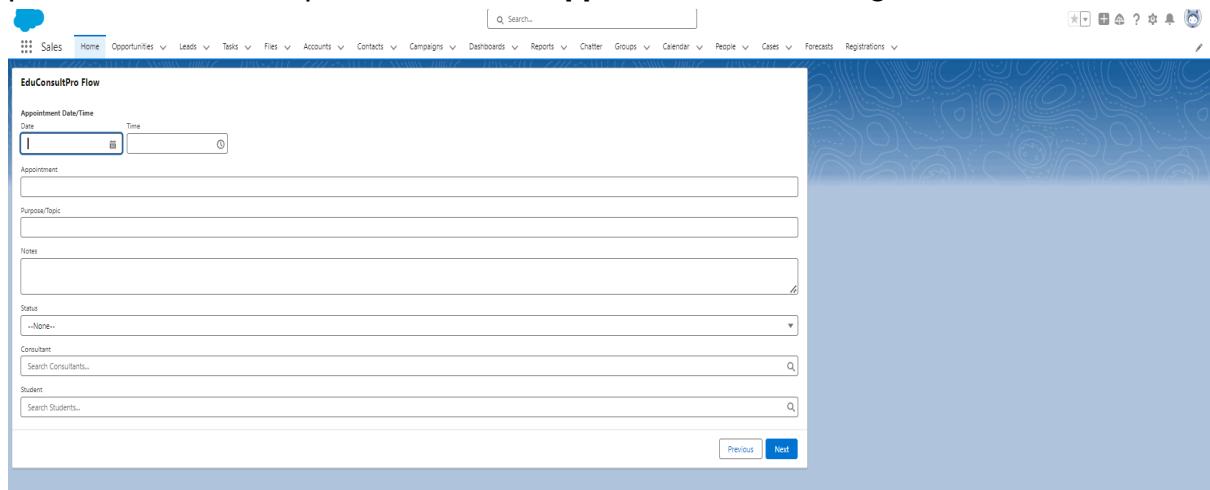


After selecting "**Yes**" to confirm they are an existing student, the user is prompted to enter their full name and email address. These details help the system identify the student for accurate record retrieval or updates. The user can then proceed with "**Next**" or return to the previous screen with "**Previous**".

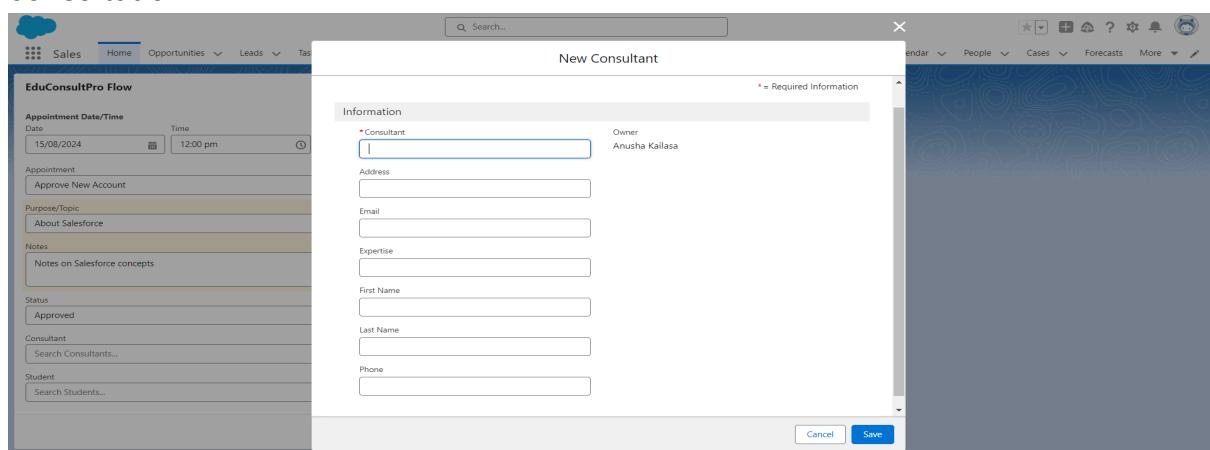
Book an appointment :



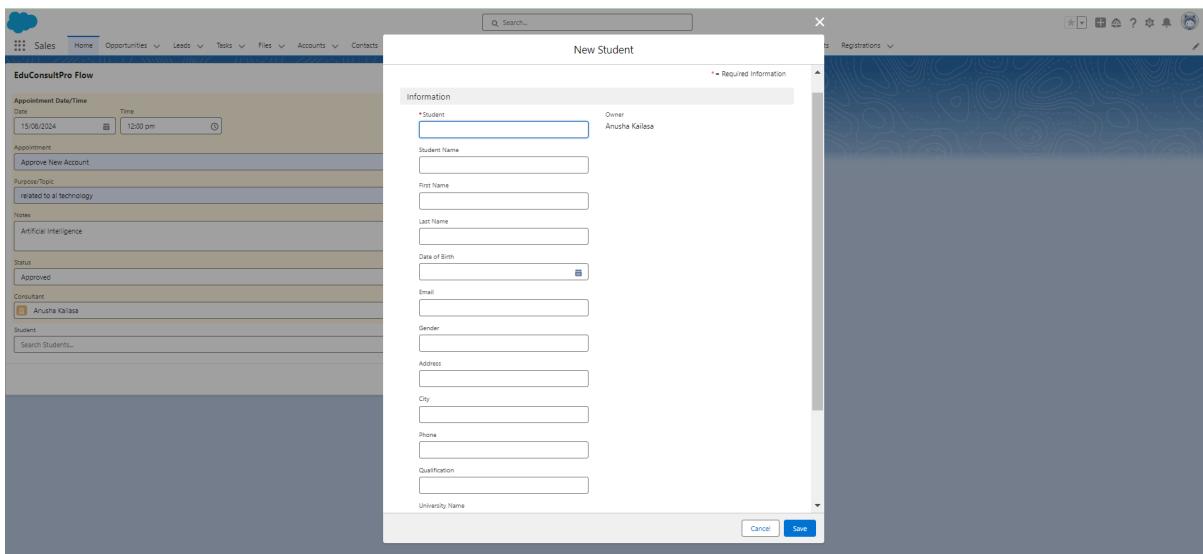
The Flow allows users to either **Book an appointment** or initiate an **Immigration case**, streamlining the process for personalized support. "How may I help you?" is presented with two options: "**Book an Appointment**" or "**Immigration Case**".



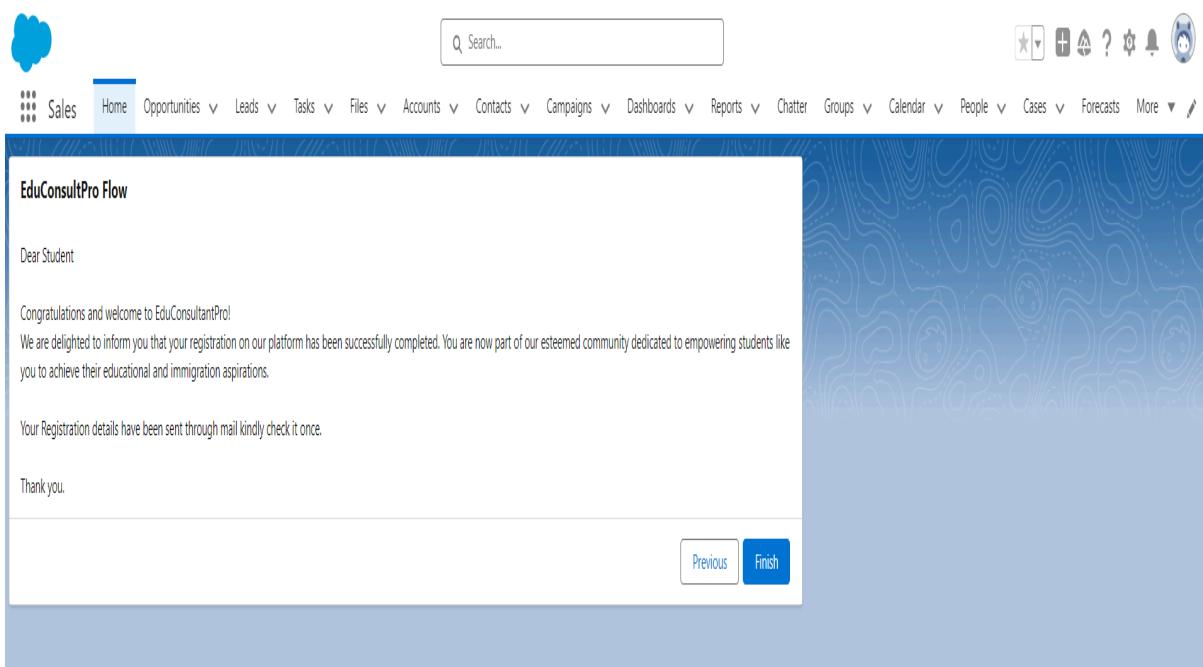
The student selects "**Book an Appointment**," indicating their need to schedule a consultation.



The **EduConsultantPro** Flow includes a form for adding **New consultant** details, enabling efficient management of consultant information.

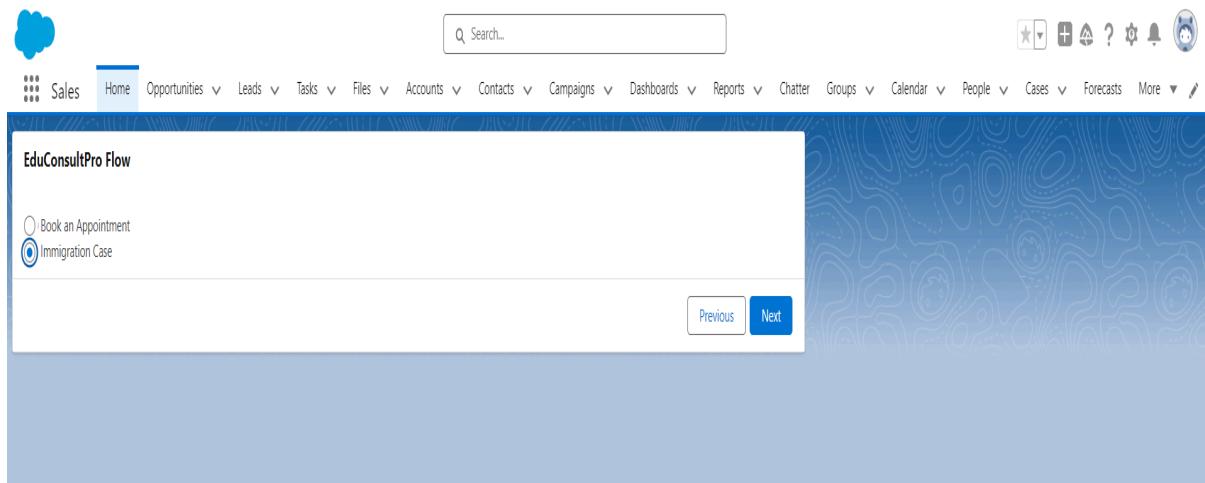


The **EduConsultantPro** Flow includes a form for adding **New Student** details.

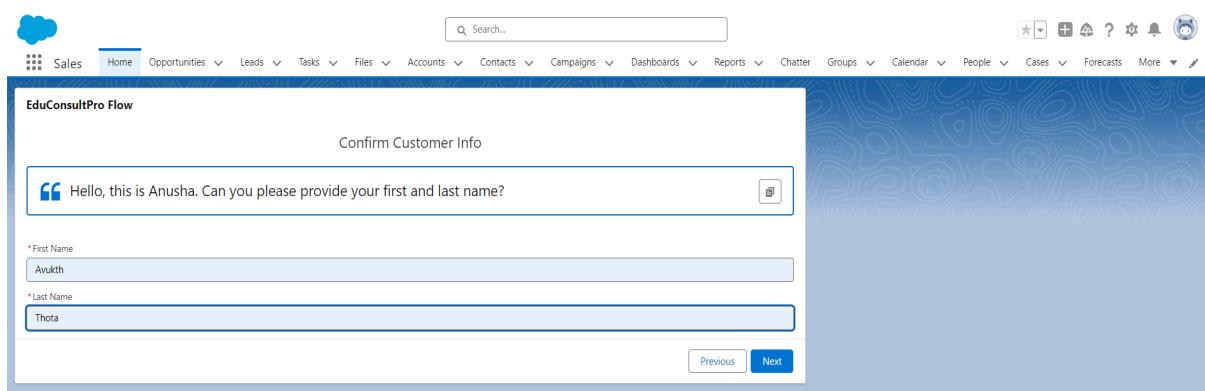


This Final screen in the EduConsultPro Flow confirms the successful completion of the appointment booking process for an existing user. It displays a congratulatory message, welcoming the student to EduConsultPro and informing them that their registration on the platform has been successfully completed. It mentions that the student's registration details have been sent via email, and they are encouraged to check their inbox. The user can either click "**Previous**" to review earlier steps or "**Finish**" to complete the process, marking the end of the appointment booking flow.

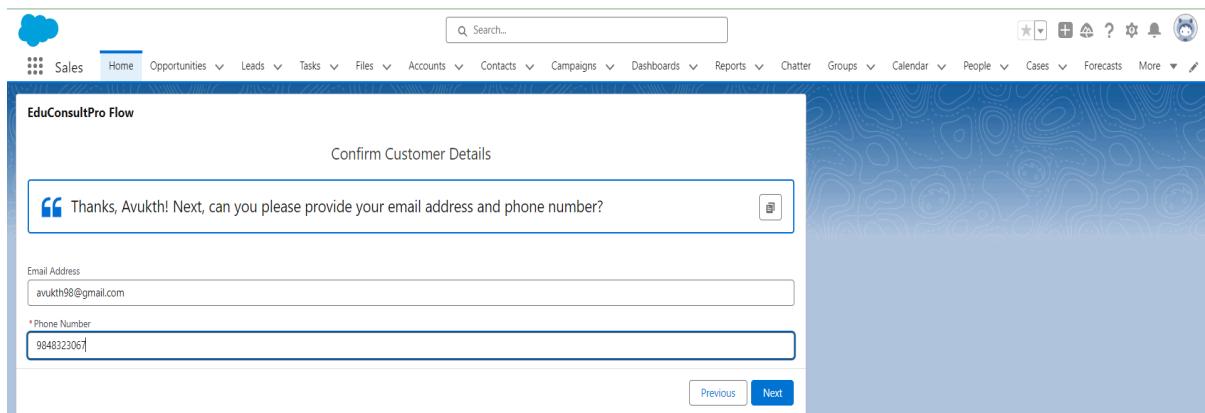
Immigration Case :



In this scenario, the "**Immigration Case**" option is selected, which suggests that the student is interested in handling issues related to immigration, such as visa applications, renewals, or other related services.



The image shows the "Confirm Customer Information" screen in a Salesforce flow, part of an immigration case management process, by giving first-name and last name.



In this step, after confirming their name, the customer is now asked to provide their contact information, specifically their email address and phone number.

EduConsultPro Flow

Get Case Details

“ What can I help you with today? ”

* Case Type
Electrical

* Case Origin
Phone

* Case Subject
About Salesforce

* Case Details
Salesforce

Previous Next

This image shows in the flow, where the customer is asked to provide specific details about their case. This step is crucial for accurately addressing the customer's needs.

EduConsultPro Flow

Case Created

“ Your case (#00001034) is created! We'll be in touch with next steps. ”

Previous Next

Here, the **Case** is created.

EduConsultPro Flow

Dear Anusha

We are pleased to update you on the status of your immigration case with EduConsultPro.

Your case has been successfully processed. We are committed to providing you with timely updates and support throughout this process.

Please check your email for detailed information about your case and next steps. Should you have any questions or need further assistance, do not hesitate to reach out to us.

Thank you for entrusting us with your immigration journey. We are here to support.

Previous Finish

The communication ends with a thank you note from the EduConsultPro team, emphasising their commitment to supporting the student throughout their immigration journey.

Are You a Existing Student?NO

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases Forecasts Registrations

EduConsultPro Flow

Are you a Existing Student
 yes
 no

Previous Next

If the user selects "**No**," indicating they are not an existing student, the flow will like gather information for a new student.

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases Forecasts Registrations

EduConsultPro Flow

Student Name: Anush Thota
First Name: Anush
Last Name: Thota
Gender: Female
Email: anushth98@gmail.com
Date of Birth: 19/08/2024
Phone: 9843232067
Address: Bangalore
City: mycity4
University Name: malaylakshmi university
Qualification: B-Tech
Year of Passing: 25/08/2025

Previous Next

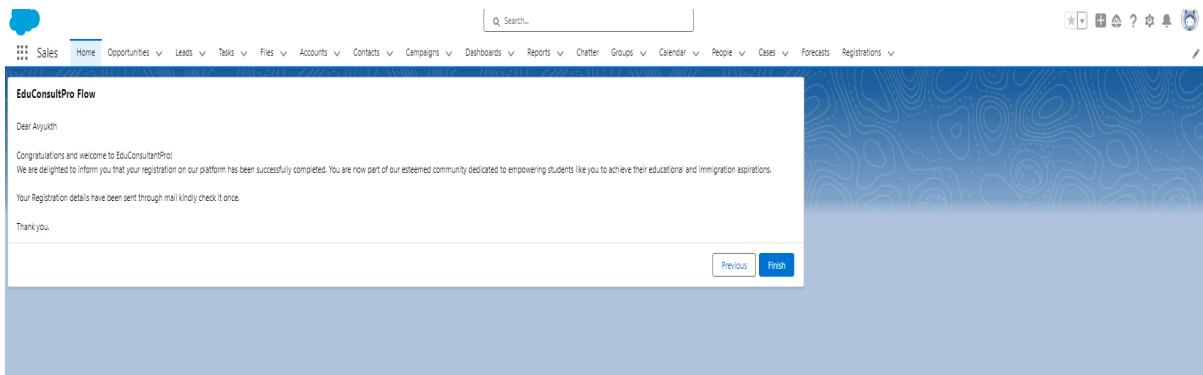
This form captures and manages student information, including personal details, educational background, and contact information. It is used by educational consultancies to organize student data for applications, admissions, and related services.

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases Forecasts Registrations

EduConsultPro Flow

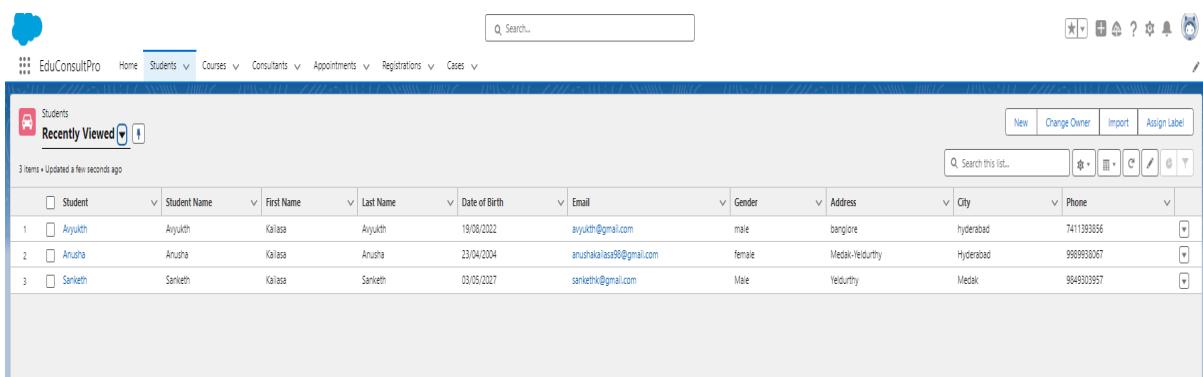
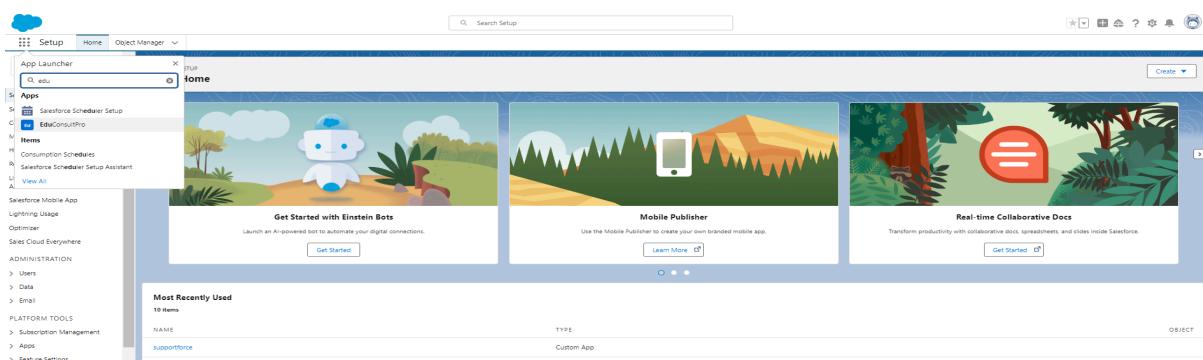
Select Course
-None-
-None-
IELTS
GRE
GMAT
Duolingo
TOEFL

It shows a dropdown menu where users can select a course from options like **IELTS**, **GRE**, **GMAT**, **Duolingo**, and **TOEFL**. This feature is used to specify the standardised test or course a student is interested in applying for.



The final step in the "EduConsultPro Flow" displays a registration confirmation message, congratulating the user and informing them that their details have been emailed. The user is advised to check their inbox and can choose to navigate back or finish the flow.

Result :



Here, we created an application called "**EduConsultPro**" is designed to streamline the management of student records, admissions, and consulting services for educational institutions. It provides user-friendly interfaces, and this centralised system automates processes, reduces manual errors, and improves service delivery by making it easy for staff to access and update student records efficiently. The application leverages Salesforce's customization tools to meet the specific needs of the institution.