A CRM Application to Manage the Services offered by an Institution

by

Kummari Baswaraj

baswarajraj30@gmail.com

Project Abstract

EduConsultPro Institute, a premier educational institution, offers a diverse array of courses and programs, attracting a ging number of prospective students each year. To efficiently manage the increasing volume of admission applications, student inquiries, and consulting services, the institute aims to implement a Customer Relationship Management (CRM) system using Salesforce. The project focuses on three core areas Admission Application Management, Consulting Services Management, and Immigration Case Management.

Admission Application Management: Prospective students will access the admission application form. The form will collect detailed information including personal details. Submitted applications will be captured and stored in Salesforce CRM, with automated email notifications sent to students upon successful submission. Admissions staff will utilize Salesforce to generate reports and dashboards to analyze application metrics, acceptance rates, and enrollment trends.

Consulting Services Management: Prospective students will request consulting services through the institute's website or portal, capturing student details, consulting preferences, and required areas of expertise. Submitted requests will be recorded in Salesforce CRM, triggering automated email notifications to consultants. Consultants will manage requests within Salesforce, including viewing, accepting, and scheduling consulting appointments. The system will track appointment statuses and facilitate effective management of consulting engagements.

The implementation of Salesforce CRM at EduConsultPro Institute aims to streamline the admission process, enhance the management of consulting services, and improve the efficiency of immigration case handling, thereby providing a seamless and transparent experience for students and staff.

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Project Title

Campus Assist

The Campus Assist project at EduConsultPro Institute aims to implement a robust Salesforce CRM system to efficiently manage an increasing volume of admission applications, student inquiries, and consulting services. This project focuses on three core areas: Admission Application Management, Consulting Services Management, and Immigration Case Management.

1. Admission Application Management

- **Application Form Capture:** Prospective students will complete an application form that gathers essential personal, academic, and background information. Upon submission, Salesforce will capture and securely store these details in the CRM system.
- **Automated Notifications:** The CRM will trigger automated emails to applicants to confirm the receipt of their applications and provide information on the next steps.
- **Data-Driven Analysis and Reporting:** Using Salesforce's reporting and dashboard tools, admissions staff can monitor application metrics such as volume, acceptance rates, and enrollment trends. This allows the team to analyze applicant demographics and application cycle efficiency for data-driven improvements.

2. Consulting Services Management

- **Request and Capture:** Prospective students can request consulting services through the institute's website or portal, where details such as student information, consulting preferences, and areas of expertise required are recorded. Salesforce will organize and store these submissions within the CRM.
- **Automated Notifications for Consultants:** Consultants will receive automated notifications through Salesforce for new consulting requests, allowing them to access all relevant student details.
- **Consultant Management and Engagement Tracking:** Consultants will use Salesforce to manage requests, review status updates, accept or decline appointments, and schedule sessions. Salesforce will track the status of each appointment, facilitating effective consulting engagement management.

3. Immigration Case Management

- **Centralized Record Keeping:** Immigration case information for students requiring assistance will be securely managed and tracked within Salesforce, centralizing all case details and status updates.

- **Automated Follow-ups and Status Updates:** Salesforce will automate reminders and provide case updates to students, ensuring clear communication and reducing repetitive inquiries.
- **Dashboards and Reports for Case Management:** Immigration case managers can use Salesforce's dashboard tools to monitor case statuses, detect potential delays, and ensure compliance with regulations.

Benefits of Campus Assist with Salesforce CRM

- **Efficiency and Scalability:** Automating essential processes allows staff to prioritize high-value tasks and easily scale operations to meet the demands of a growing applicant base.
- **Enhanced Student Experience:** Automated notifications, transparent communication, and streamlined inquiries contribute to a better experience for students, increasing satisfaction and reducing response times.
- **Informed Decision-Making:** With Salesforce's powerful analytics, EduConsultPro's management can make data-driven decisions to improve admission rates, allocate resources more effectively, and enhance overall operational efficiency.

The Campus Assist project positions EduConsultPro Institute as a forward-thinking, technology-driven institution, ready to manage admissions, consulting services, and immigration cases seamlessly and transparently. This project will create a structured and positive experience for both students and staff.

1.Introduction

The Campus Assist project at EduConsultPro Institute is a comprehensive initiative designed to transform how the institution manages its core administrative functions using Salesforce CRM. As the institute grows and draws increasing numbers of prospective students, the demand for efficient handling of admission applications, student inquiries, and consulting services has intensified. The *Campus Assist* project responds to these challenges by implementing a centralized, technology-driven solution aimed at streamlining processes and enhancing the overall experience for both students and staff.

With Salesforce CRM at the core of Campus Assist, the project will focus on three key areas: Admission Application Management, Consulting Services Management, and Immigration Case Management. For admission applications, prospective students will submit their information via an online form, which is then automatically captured in Salesforce. This will not only ensure the secure storage of data but also trigger automated notifications to applicants, confirming submission and providing next steps. Additionally, the admissions team will gain access to powerful reporting and dashboard tools, allowing them to analyze application metrics, acceptance rates, and enrollment trends, making data-driven improvements possible.

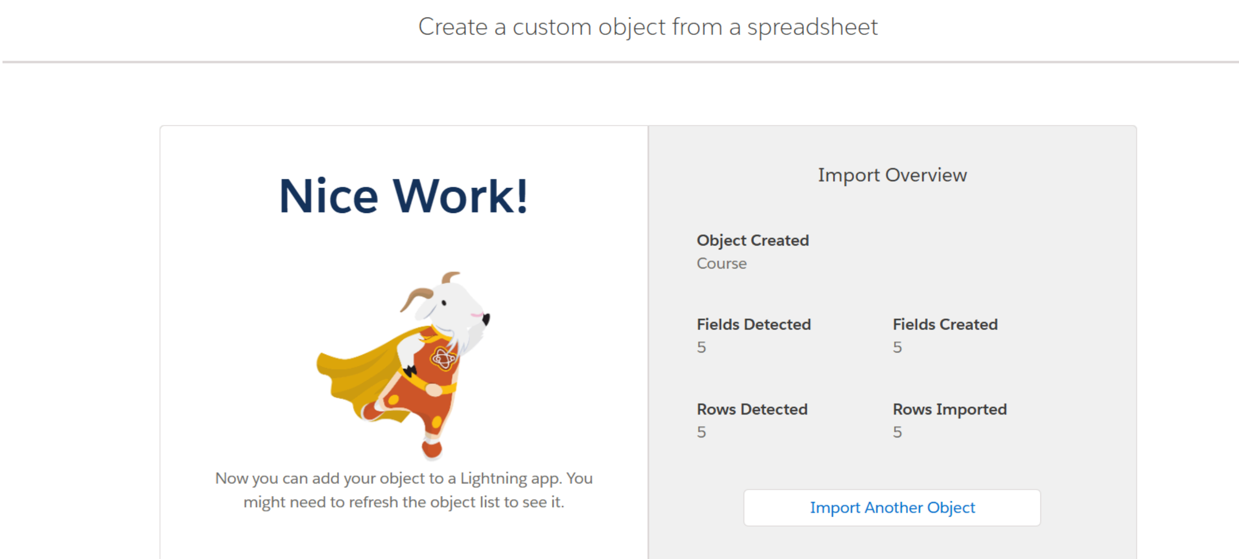
In the area of Consulting Services Management, Campus Assist will enable prospective students to request consulting support directly through the website or portal, capturing all necessary details, such as consulting preferences and areas of expertise needed. Salesforce CRM will record each request, send automated notifications to consultants, and facilitate easy scheduling of appointments. Consultants will manage engagements within Salesforce, where they can track appointment statuses, accept sessions, and manage their consulting workload effectively, resulting in a structured and efficient consulting process.

Finally, Immigration Case Management under Campus Assist will provide centralized, secure handling of all immigration-related cases for students. Salesforce will allow immigration advisors to track and update case information, automate follow-up notifications, and keep students informed of case progress, promoting transparency and reducing the volume of routine inquiries. By implementing the Campus Assist project, EduConsultPro Institute aims to improve efficiency, enhance student experience, and provide data-backed insights for better decision-making, establishing itself as a forward-thinking, student-centered institution..

2. Creating Objects from Spreadsheet

2.1 Create Course object

- Go to your object manager in Salesforce.
- Click on "Custom Object from Spreadsheet".
- Download the spreadsheet for the course.
- Upload the file to Salesforce.
- Map the fields accordingly.
- Upload the file to create the object.



2.2 Creating Remaining Objects:

Follow the same steps used for creating the course object:

- Go to your object manager in Salesforce.
- Click on "Create Object from Spreadsheet."
- Download the following spreadsheets:
- Consultant
- Student
- Appointment
- Upload each file to Salesforce.
- Map the fields accordingly.
- Upload each file to create the respective objects.

Create a custom object from a spreadsheet

Nice Work!

Now you can add your object to a Lightning app. You might need to refresh the object list to see it.

Import Overview

Object Created
Consultant

Fields Detected	Fields Created
6	6

Rows Detected	Rows Imported
3	3

Import Another Object

Create a custom object from a spreadsheet

Object Created

Now you can add your object to a Lightning app. You might need to refresh the object list to see it.

Import Overview

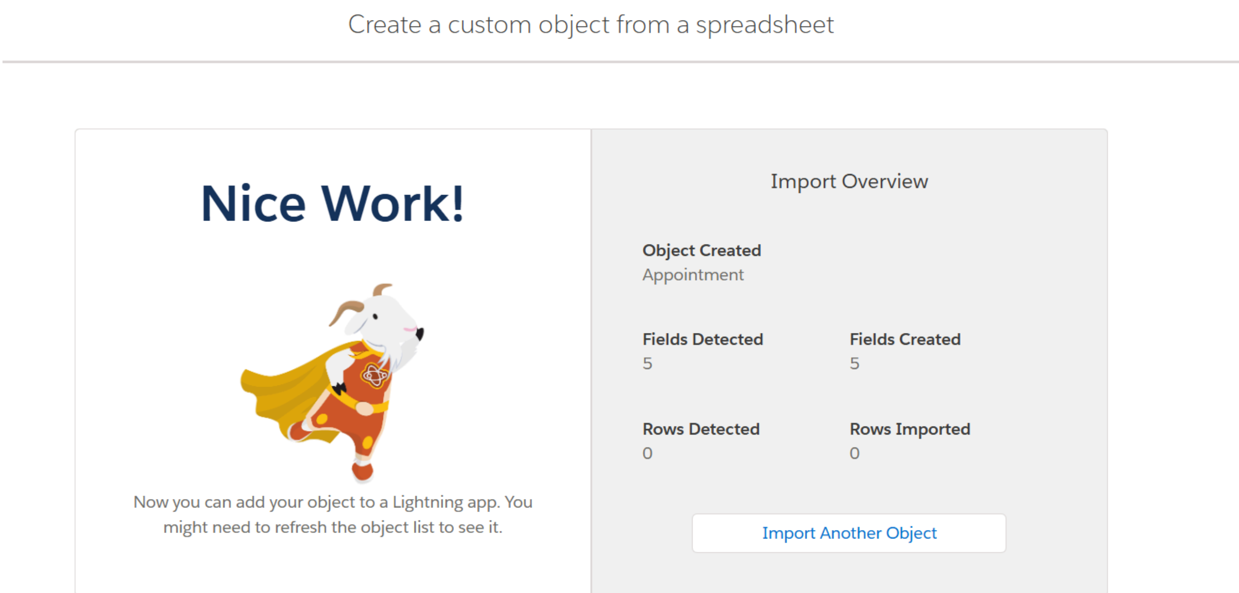
We couldn't import all of your row data. Try again using the Data Import Wizard in Setup.

Object Created
Student

Fields Detected	Fields Created
12	12

Rows Detected	Rows Imported
2	0

Import Another Object



1. Create Lookup Relationships

Between Appointment and Student:

1. Navigate to **Object Manager** and select the "Appointment" object.
2. Click on **Fields & Relationships**, then click **New**.
3. Select **Lookup Relationship** and click **Next**.
4. Choose **Student** as the related object and click **Next**.
5. Complete the required details and save the relationship.

Between Appointment and Consultant:

1. In **Object Manager**, select the "Appointment" object.
2. Go to **Fields & Relationships**, then click **New**.
3. Select **Lookup Relationship** and click **Next**.
4. Choose **Consultant** as the related object and click **Next**.
5. Fill in the necessary details and save the relationship.

2. Create the Registration Object

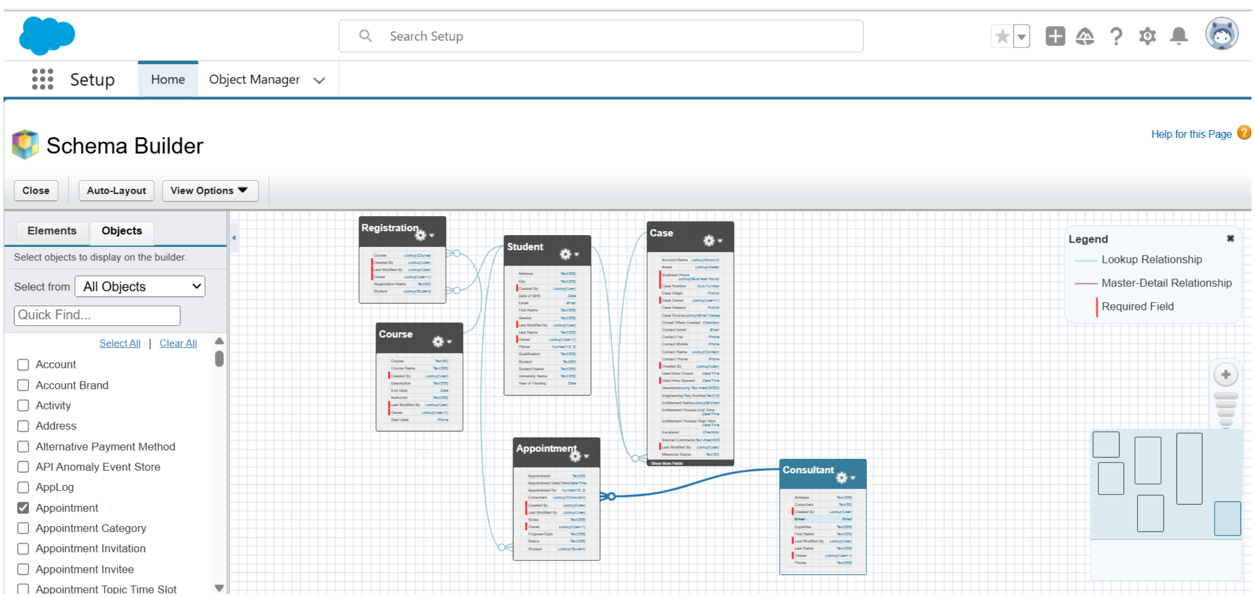
Steps to Create the Registration Object:

1. In Object Manager, click on **Create Custom Object**.
2. Name the object **Registration**.
3. Add fields to capture details such as **Student ID** and **Course ID**.
4. Save the object.

3. Create Lookup Relationship Between Student and Case

Steps to Create the Lookup Relationship:

1. Navigate to **Object Manager** and select the "Case" object.
2. Click on **Fields & Relationships**, then click **New**.
3. Choose **Lookup Relationship** and click **Next**.
4. Select **Student** as the related object and click **Next**.
5. Complete the required details and save the relationship.



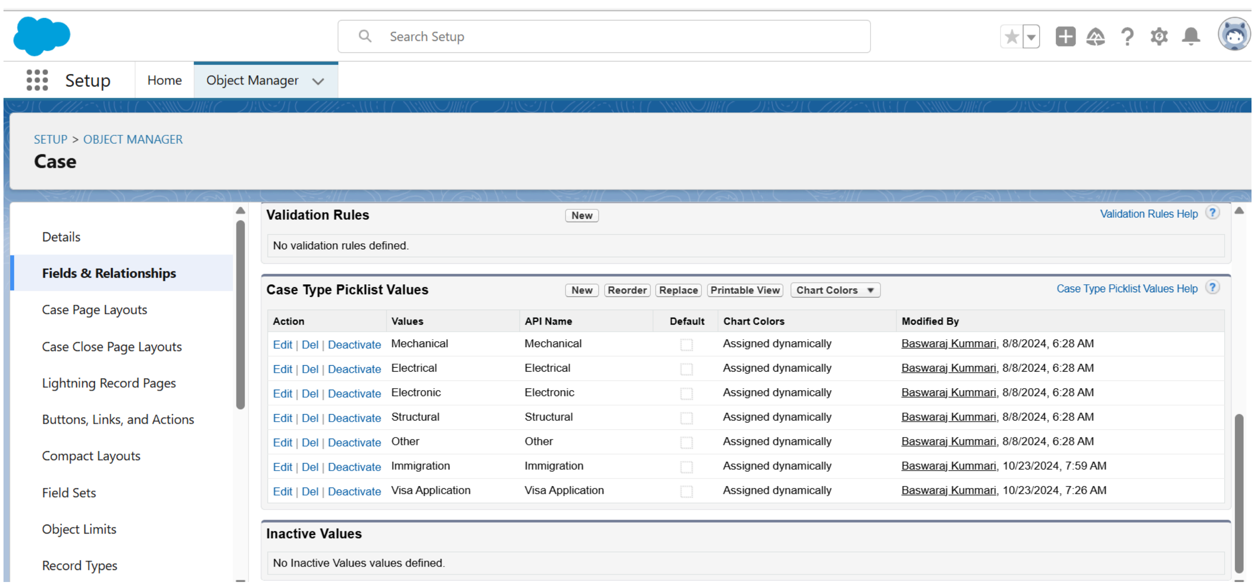
2.4 Configure the Case Object

Edit the Case Object:

1. Go to **Object Manager** in Salesforce.
2. Select **Case** from the list of objects.

Add Values to the "Type" Field:

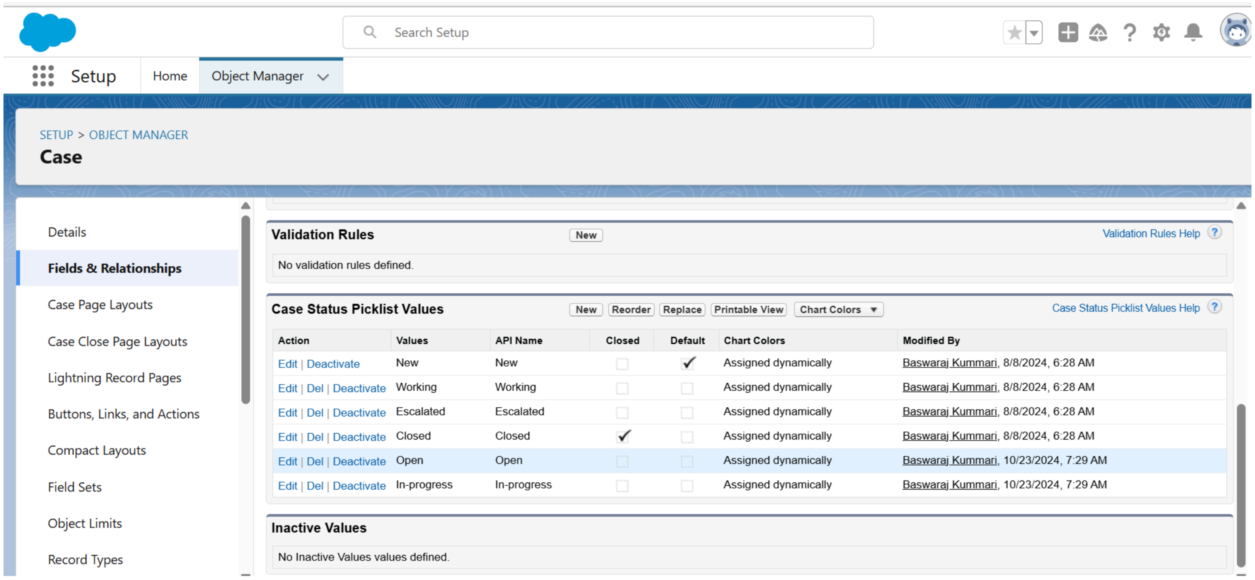
1. In the Case object, click on **Fields & Relationships**.
2. Find and select the **Type** field.
3. Click **New** to add a new picklist value.
4. Enter **Immigration** and click **Save & New**.
5. Enter **Visa Application** and click **Save**.



Add Values to the "Status" Field:

1. In the Case object, return to **Fields & Relationships**.
2. Find and select the **Status** field.
3. Click **New** to add a new picklist value.
4. Enter **Open** and click **Save & New**.
5. Enter **In-progress** and click **Save**.

6. Lastly, enter **Closed** and click **Save**



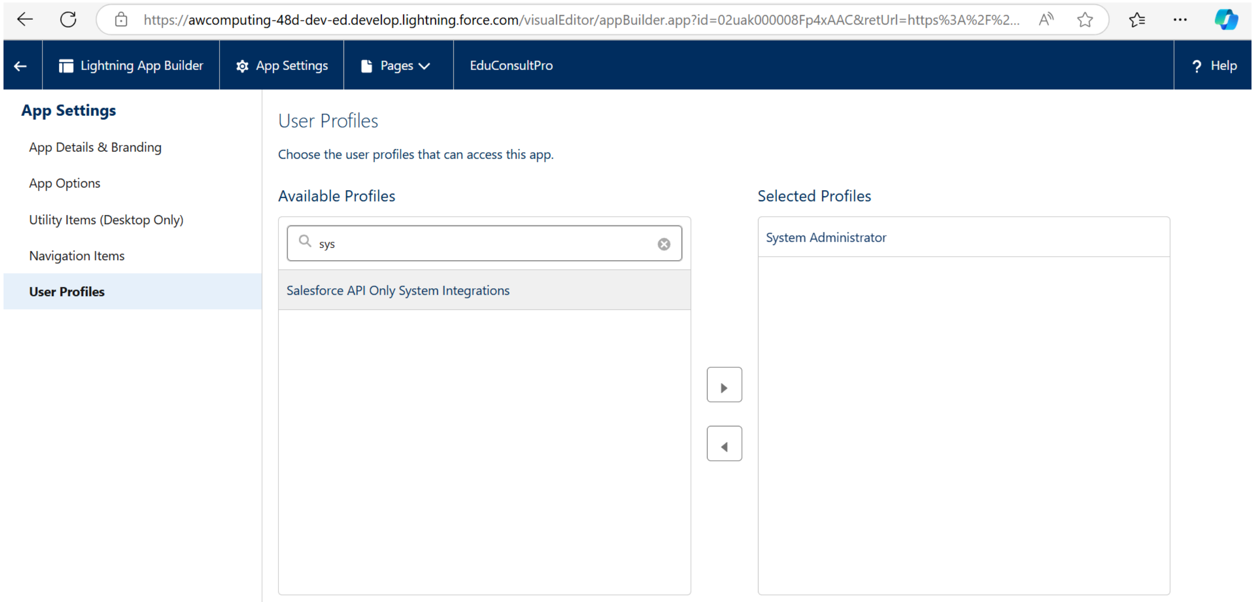
2.5 Create a Lightning App

Go to Setup:

1. In Salesforce, go to **Setup**.
2. In the **Quick Find** box, type **App Manager** and select it.

Create New Lightning App:

1. Click on **New Lightning App**.
2. Enter the app name as **EduConsultPro**.
3. Click **Next** three times to proceed through the initial setup screens.



Add Items to the App:

1. In the **Available Items** section, select and add the following to **Selected Items**:
    - Home
    - Students
    - Courses
    - Consultants
    - Appointments
    - Registrations
    - Cases

Add Profiles to the App:

1. In the **Available Profiles** section, select **System Administrator** and add it to **Selected Profiles.**

Save and Finish:

3.Creating a ScreenFlow For Student Admission Application Process

3.1 Add Screen Element

Create a New Screen Flow:

1. Go to **Setup** in Salesforce.
2. In the **Quick Find** box, type **Flow Builder** and select it.
3. Click on **New Flow.**
4. Choose **Screen Flow** and click **Create.**

Add a Screen Element:

1. In the Flow Builder, drag the **Screen** element from the left sidebar onto the canvas.
2. In the **Screen Properties** pane, enter **Student Info** for the **Label.**

Create a New Resource:

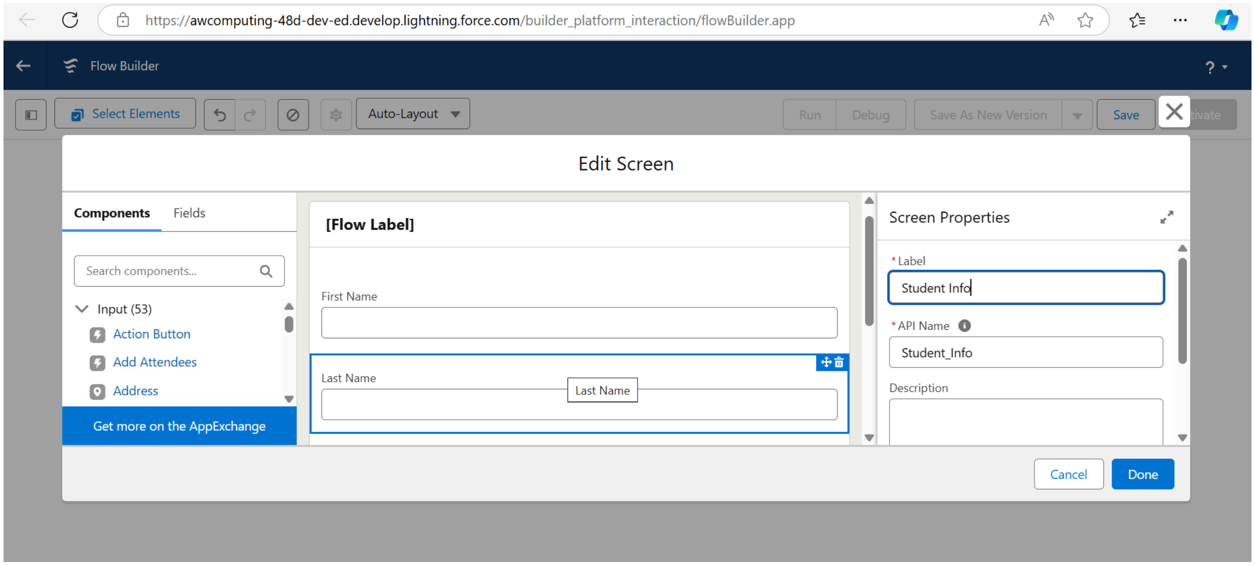
1. Click on the **Record Variable** option to create a new resource.
2. Name the resource **StudentRecordRes.**
3. Select **Record** as the resource type.
4. For the **Object**, select **Student.**
5. Click **Done** to create the resource.

Add Fields to the Screen:

1. Drag the necessary fields from the **Fields** tab onto the screen to collect student information. Suggested fields may include:
    - **First Name**
    - **Last Name**
    - **Email**
    - **Phone**

Configure and Save the Screen Flow:

1. Configure any additional properties or settings for the screen as needed.
2. Once you are satisfied with the configuration, click **Save** to save your Screen Flow.



3.2 Creating Student Record Using Create Element

Add a Create Element:

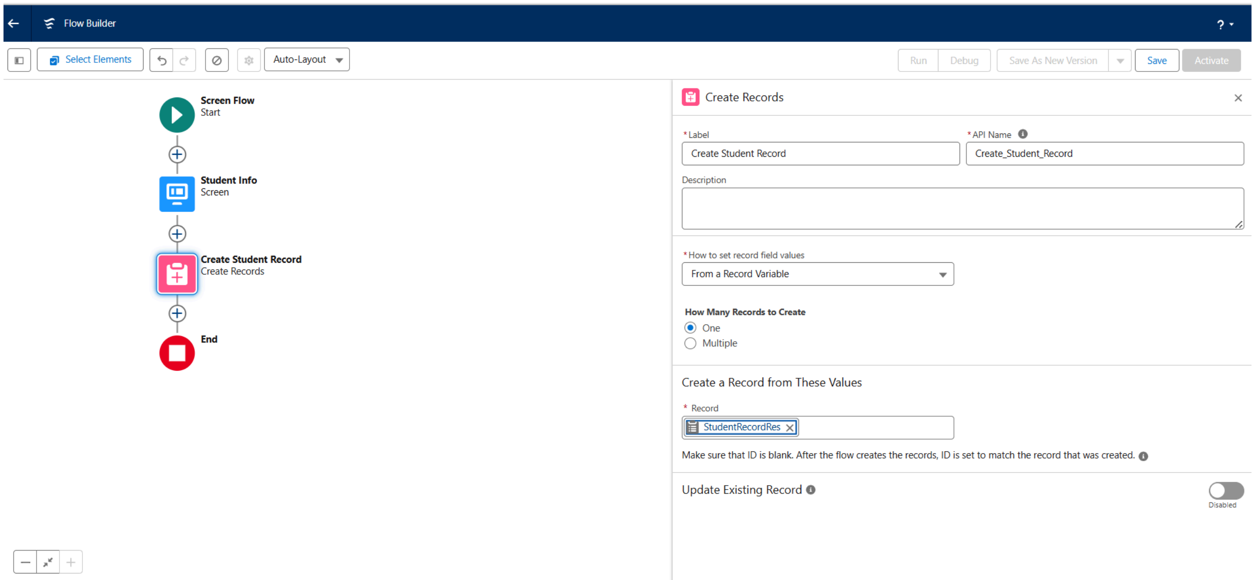
1. In the Flow Builder, ensure that the **Student Info Screen** element is already added to the flow.
2. Drag the **Create Records** element from the left sidebar onto the canvas, placing it after the **Student Info Screen** element.
3. In the **Create Records** properties pane, label it as **Create Student Record**.

Configure the Create Element:

1. For **How many records to create**, select **One.**
2. For **How to Set the Record Fields**, select **Use all values from a record**.

Set the Record Variable Resource:

1. Under **Create a Record from These Values**, select the record variable resource **StudentRecordRes** that was created in the Student Info screen.



3.3 Add Screen Element

Add a Screen Element:

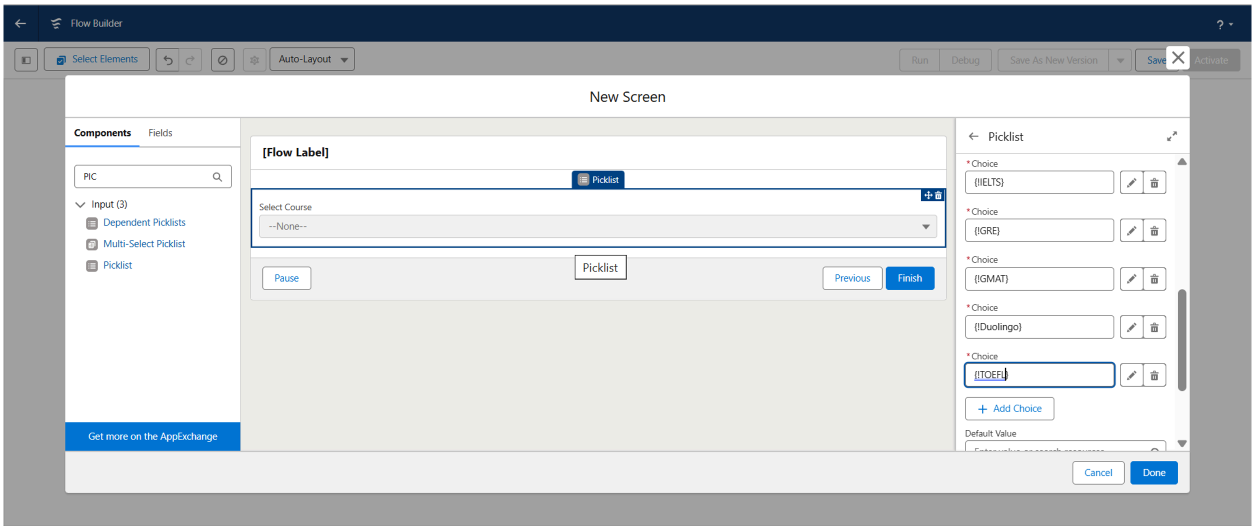
1. In the Flow Builder, drag a **Screen** element from the left sidebar onto the canvas, placing it after the **Create Student Record** element.
2. In the **Screen Properties** pane, label it as **Course Screen**.

Add a Picklist Component:

1. On the **Course Screen**, drag the **Picklist** component from the left sidebar onto the screen.
2. Label the Picklist component as **Select Course.**

Configure the Picklist Choices:

1. In the **Choices** section of the Picklist component, click on **+ Add Choice.**
2. For the first choice, type **IELTS** and press **Enter.** This will automatically create a variable named **IELTS**.
3. Repeat this process for the following choices:
   - **GRE**
   - **GMAT**
   - **Duolingo**



3.4 Add Decision Element

Add a Decision Element:

1. In the Flow Builder, drag a **Decision** element from the left sidebar onto the canvas, placing it after the **Course Screen** element.
2. In the **Decision Properties** pane, label it as **Selecting Course**.

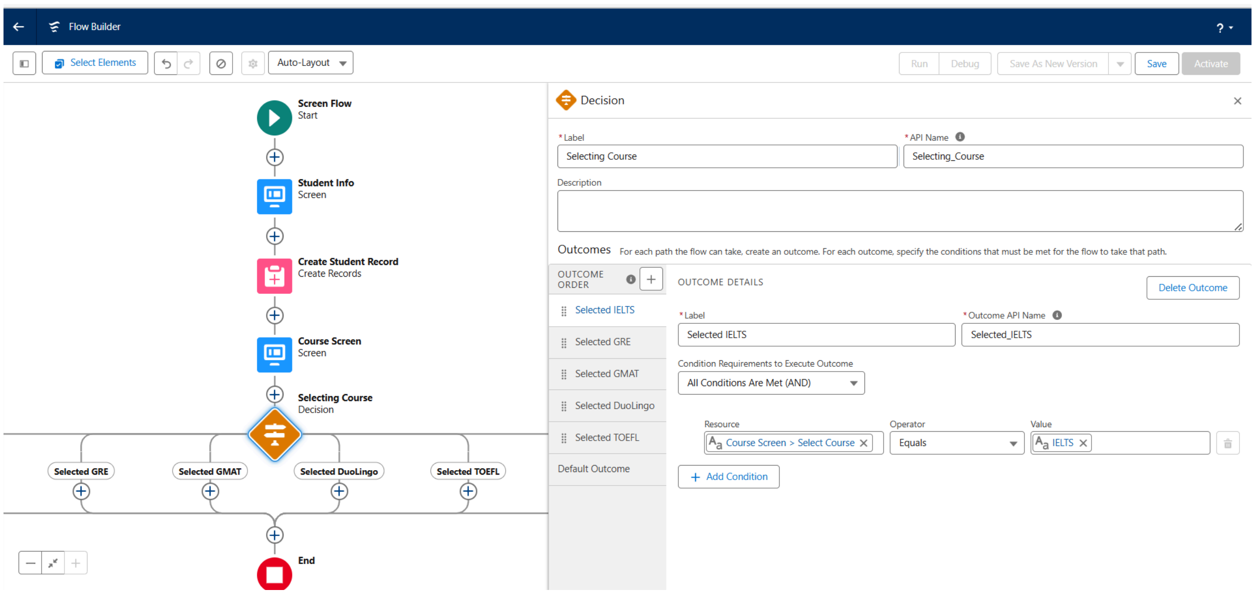
Configure the Decision Outcomes:

1. **Outcome 1**:
   - Label: **Selected IELTS.**
   - Resource: **Select_Course** (the Picklist component from the Course Screen).
   - Operator: **Equals.**
   - Value: **{!IELTS}** (the choice variable created from the Course Screen).
2. Click on the **+ Add Outcome** button to add a new outcome.
   - Label: **Selected GRE.**
   - Resource: **Select_Course.**
   - Operator: **Equals.**
   - Value: **{!GRE}.**
3. Repeat the above step for the remaining choices:
   - **Outcome Label**: Selected GMAT

- Resource: **Select_Course**
- Operator: **Equals**
- Value: **{!GMAT}**

- **Outcome Label**: Selected Duolingo
  - Resource: **Select_Course**
  - Operator: **Equals**
  - Value: **{!Duolingo}**
- **Outcome Label**: Selected TOEFL
  - Resource: **Select_Course**
  - Operator: **Equals**
  - Value: **{!TOEFL}**

4. Click **Done** to complete the configuration of the Decision element.



3.5 Add GET Record Element

Add a GET Record Element:

1. In the Flow Builder, drag a **Get Records** element from the left sidebar onto the canvas, placing it under the **Selecting Course** Decision element on the **Selected IELTS** path.
2. In the **Get Records Properties** pane, label it as **Get IELTS Rec**.

Configure the GET Record Element:

1. **Object**: Select **Course.**
2. **Condition Requirements**: Choose **All Conditions Are Met (AND).**

Add Condition:

1. **Field**: Select **Course Name.**
2. **Operator**: Choose **Equals.**
3. **Value**: Set to **{!Select_Course}** (the Picklist component from the Course Screen)**.**

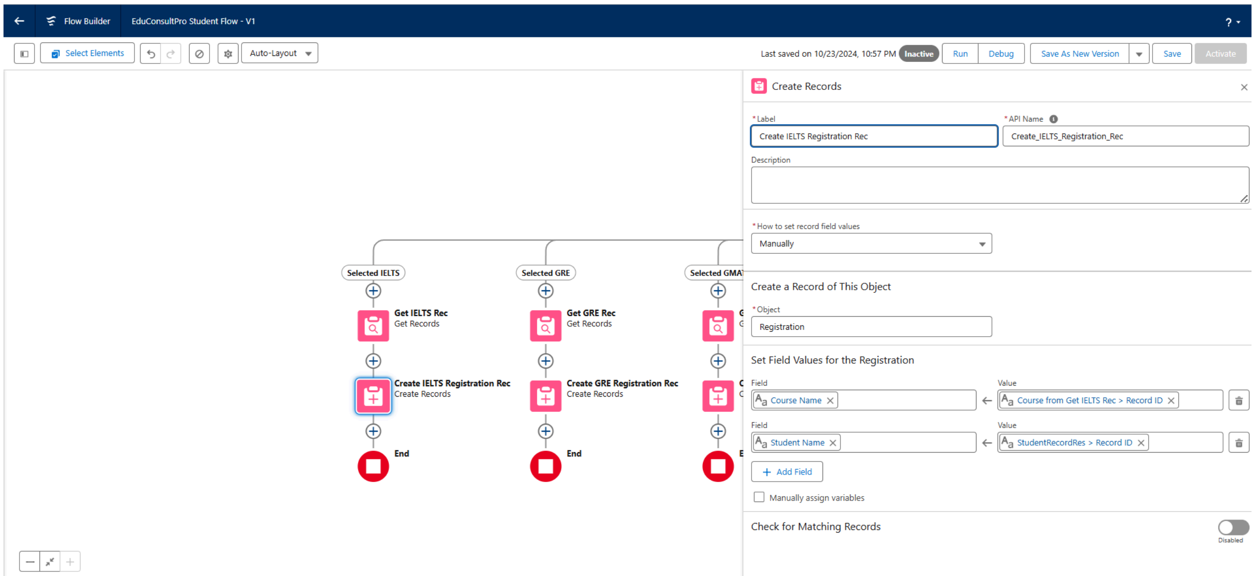
Repeat for Other Paths:

Repeat the above steps for the remaining paths (GRE, GMAT, TOEFL, Duolingo) by creating additional Get Records elements:

- For the **Selected GRE** path, label it as **Get GRE Rec.**
- For the **Selected GMAT** path, label it as **Get GMAT Rec.**
- For the **Selected Duolingo** path, label it as **Get Duolingo Rec.**
- For the **Selected TOEFL** path, label it as **Get TOEFL Rec.**

In each of these elements, set the same configurations, changing only the label and ensuring that the **Value** field in the conditions corresponds to the respective course (e.g., GRE for **Get GRE Rec**)**.**

These steps will help you set up Get Records elements to retrieve course information based on the selected course in the flow.



3.6 Create Registration Record Using Create Records Element

Create Element for IELTS:

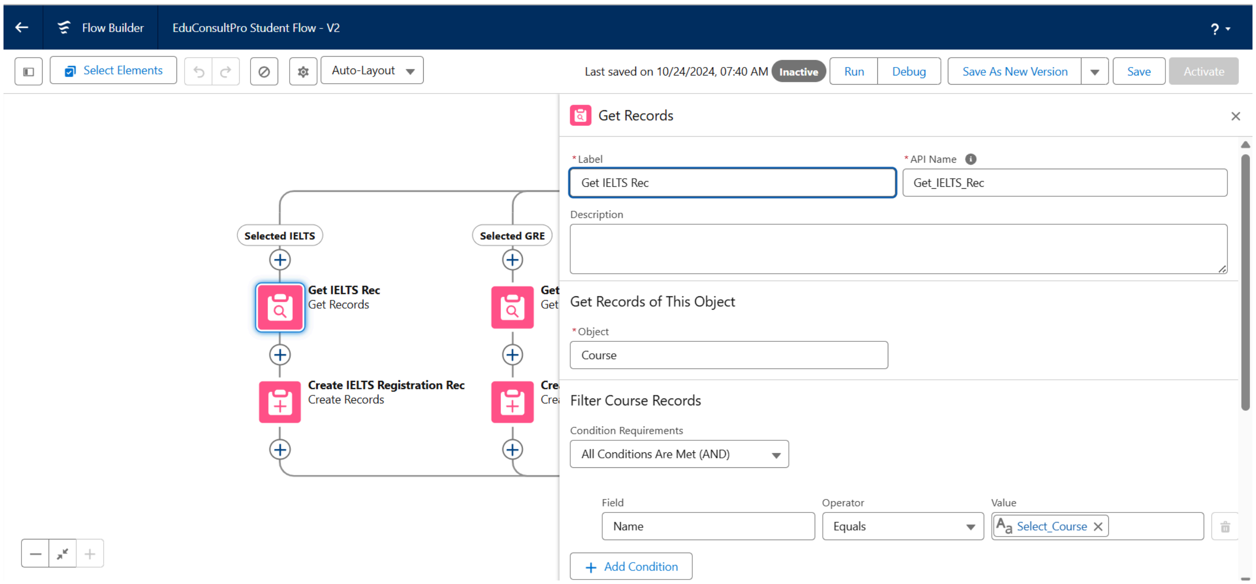
1. In the Flow Builder, drag a **Create Records** element from the left sidebar onto the canvas, placing it after the **Get IELTS Rec** element.
2. In the **Create Records Properties** pane, label it as **Create IELTS Registration Rec**.

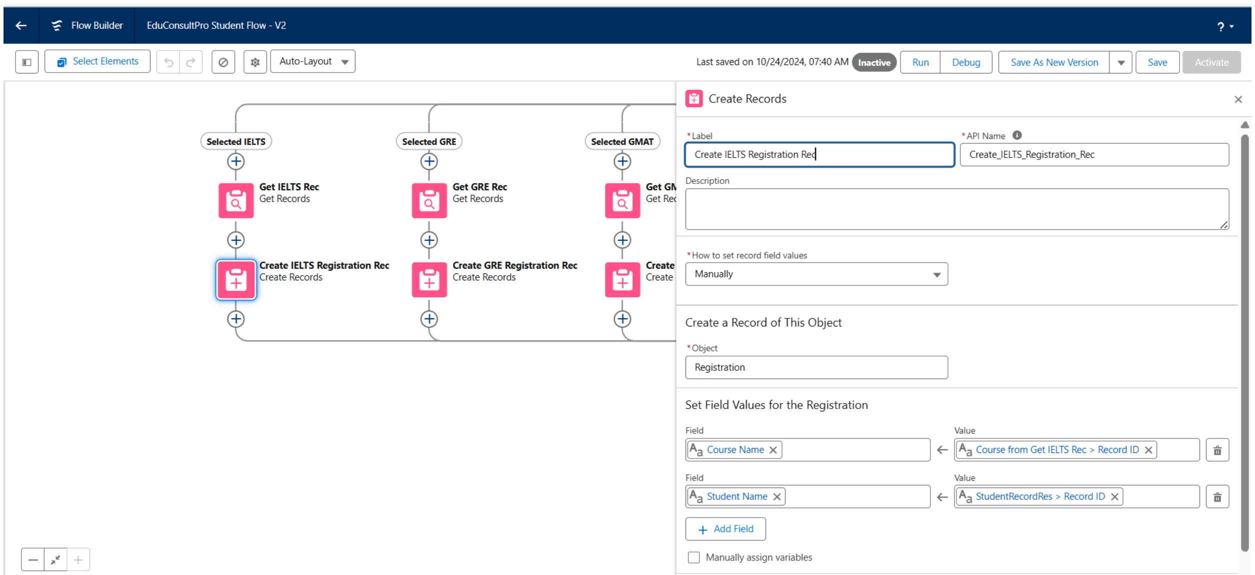
Configure the Create Element for IELTS:

1. **How many records to create**: Select **One.**
2. **How to Set the Record Fields**: Choose **Use separate resources, and literal values.**
3. **Object**: Select **Registration**.

Add Fields for IELTS Registration:

1. **Field**: Enter **Course_Name__c**.
   - **Value**: Set to **{!Get_IELTS_Rec.Id}** (to reference the ID of the retrieved IELTS course).
2. **Field**: Enter **Student_Name__c**.
   - **Value**: Set to **{!StudentRecordRes.Id}** (to reference the ID of the student record).
3. Click **Done** to complete the Create element configuration for IELTS.

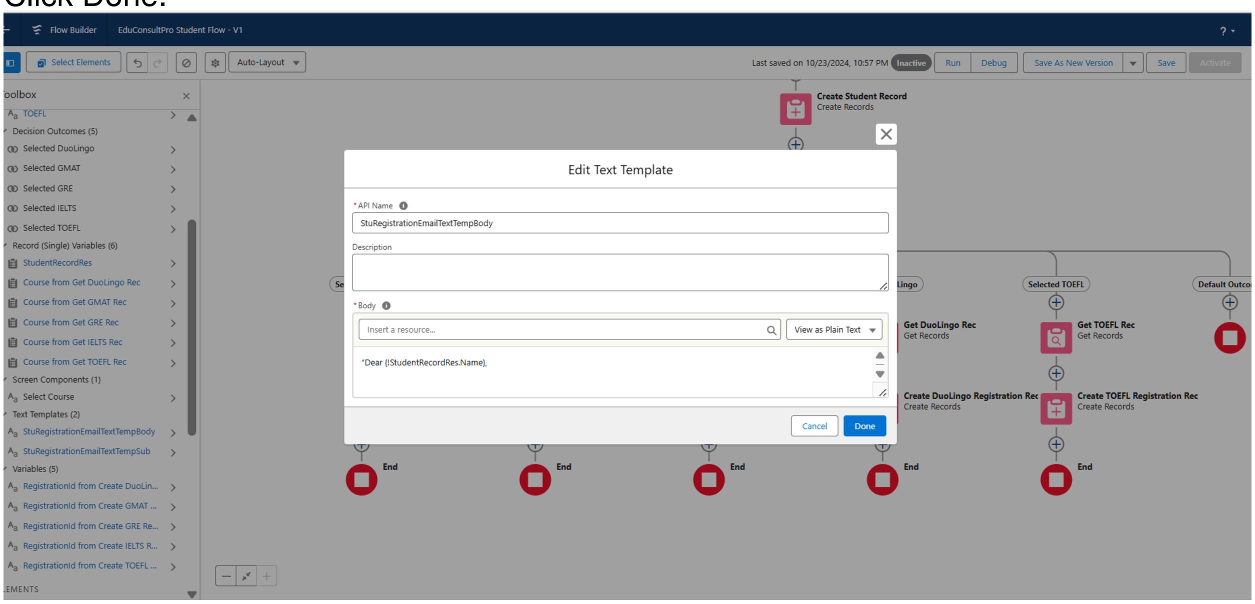




3.7 Creating Email Text Template Variables for email body and subject

Create a New Resource:
In the Flow Builder, click on the Toggle Toolbox on the left corner.
Click New Resource.
Select Text Template as the Resource Type.
Configure the Text Template:
API Name:StuRegistration Email Text TempBody
Select View:View as Plain Text
Enter the Text:
Paste the following text into the 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.
Click Done.



Repeat same steps to create an email text template for the email subject, label it as "StuRegistrationEmailTextTempSub", write a text message in the body and save it.

3.8 Add an Action Element

Add an Action Element:

1. In the Flow Builder, drag an **Action** element from the left sidebar onto the canvas, placing it after all the Decision paths (IELTS, GRE, GMAT, TOEFL, Duolingo).
2. In the **Action Properties** pane, label it as **Send Email to Student.**

Configure the Action Element:

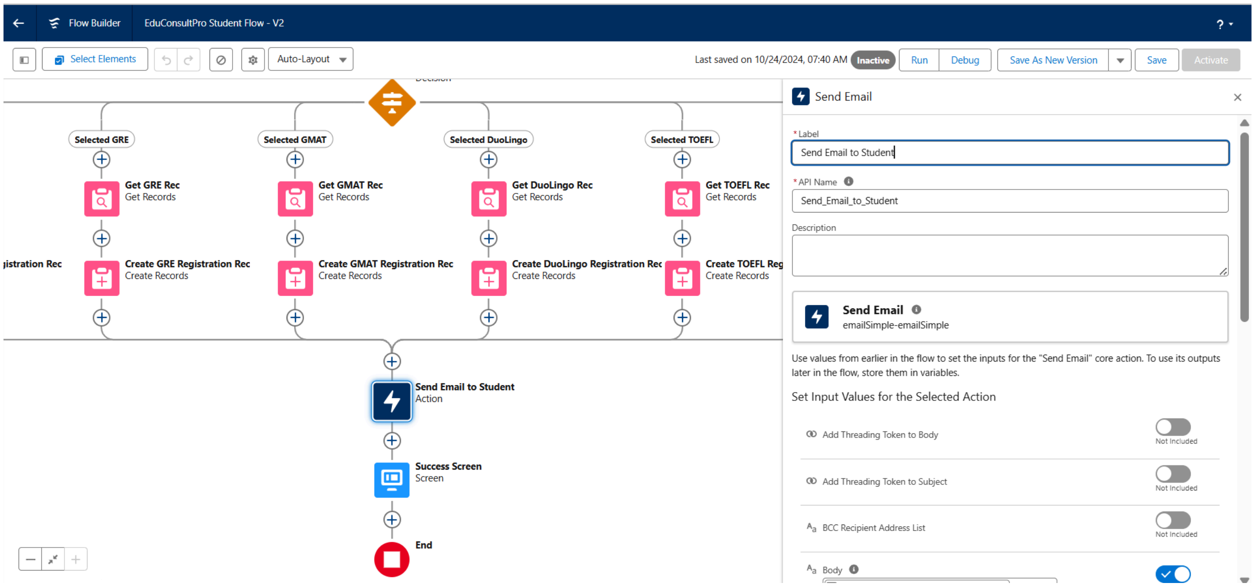
1. **Action Type**: Select **Send Email** (or the appropriate email action available in your Salesforce instance).

Set Input Values:

1. **Body**:
    - Set the input value to **{!StuRegistrationEmailTextTempBody}** (the Text Template created earlier).
2. **Recipient Address List**:
    - Set the input value to **{!StudentRecordRes.Email__c}** (the email address of the student).
3. **Subject**:
    - Set the input value to **{!StuRegistrationEmailTextTempSub}** (you'll need to create or specify this variable if it's not already created).

Click Done:

- After setting the input values, click **Done** to complete the configuration of the Action element.



3.9 Add Screen Element

Add a Screen Element:

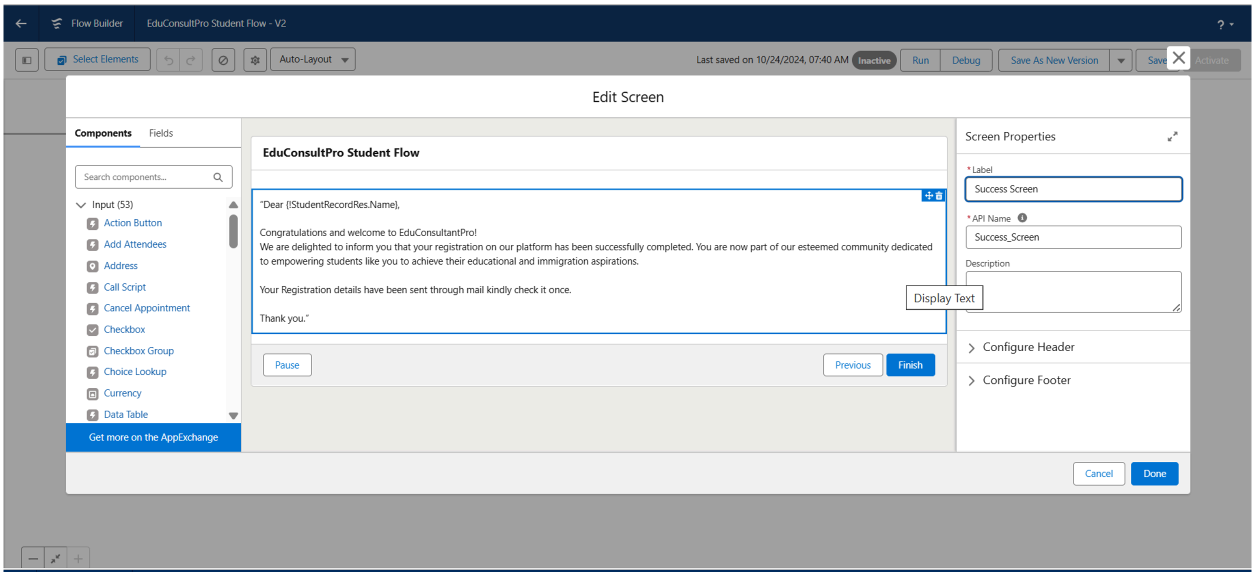
1. In the Flow Builder, drag a **Screen** element from the left sidebar onto the canvas, placing it after the **Send Email to Student** Action element.
2. In the **Screen Properties** pane, label it as **Success Screen.**

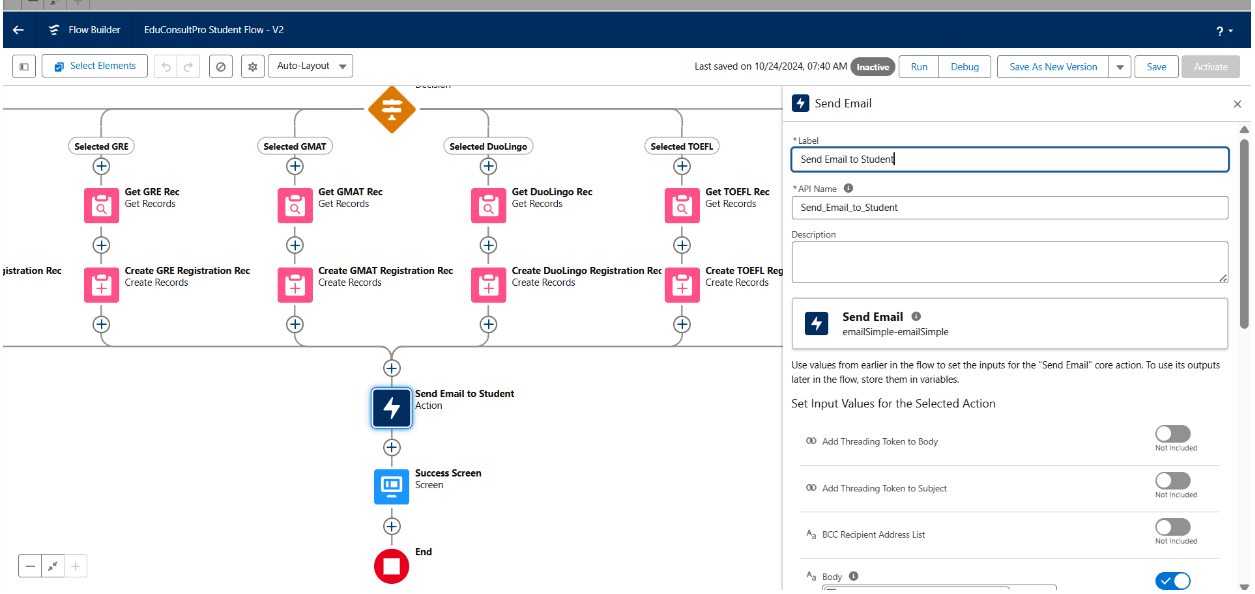
Add Display Text Component:

1. In the left sidebar, search for the **Display Text** component.
2. Drag the **Display Text** component into the **Success Screen** panel.

Configure the Display Text Component:

1. **Label**: Set the label to **SuccessMessage.**
2. **Text**: In the Resource Picker box, paste the following message:





4.Create Users

4.1 User Creation

Navigate to User Creation:

1. Go to **Setup** (click the gear icon in the top right corner).
2. Under **Administration**, select **Users**.

3. Click on **New User**.

Enter User Details:

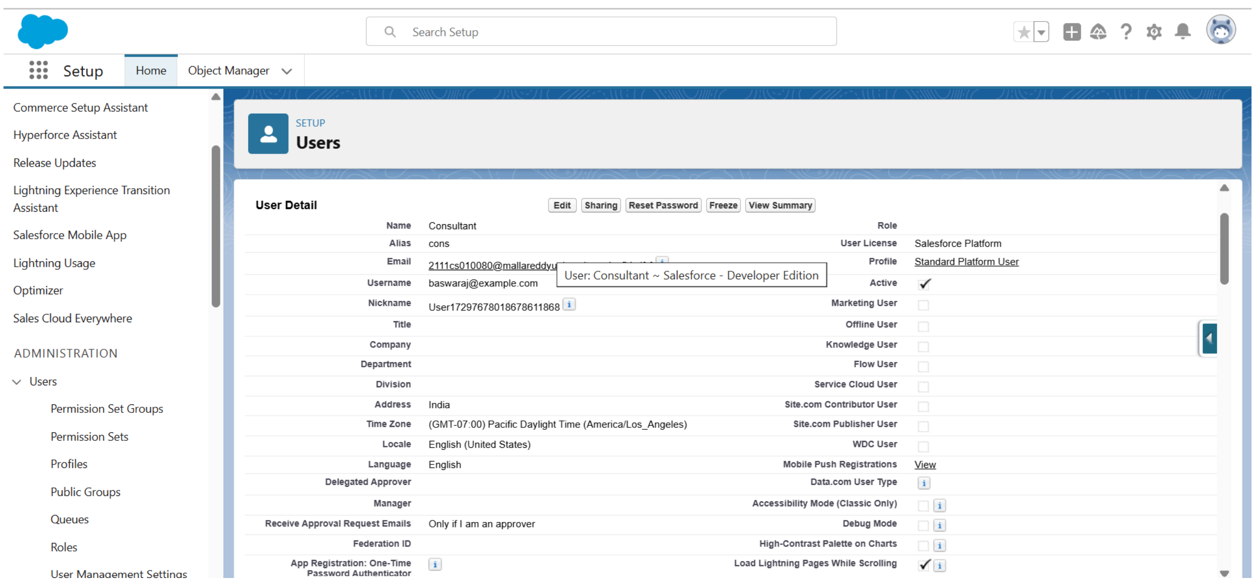
1. **Last Name**: Enter **Consultant**.
2. **License**: Select **Salesforce Platform**.
3. **Profile**: Select **Standard Platform User**.

Fill in Mandatory Fields:

1. Complete all other mandatory fields (e.g., **First Name**, **Email**, **Username**) as required for user creation.

Save the User:

1. Click **Save** to create the new user.



4.2 Configure User Settings

Navigate to User Settings:

1. Go to **Setup**.
2. Under **Administration**, select **Users**.
3. Find the user record for the newly created user and click **Edit** next to their name.

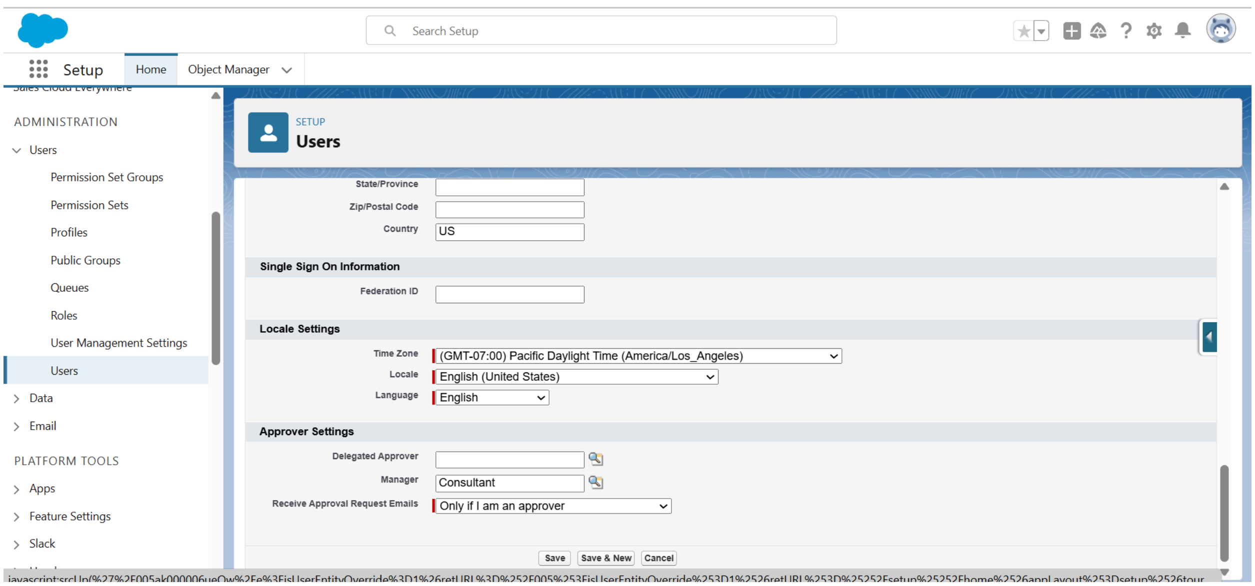
Update Approver Settings

Set Manager as Consultant:

1. In **Setup**, go to **Users**.
2. Find the specific user and click **Edit**.
3. In the **Manager** field, select **Consultant** from the dropdown list.

Save Changes:

1. Click **Save** to apply the changes.



5.1 Create an Email Template

Enable Lightning Email Templates:

1. Go to **Setup** (click the gear icon in the top right corner).
2. Enter **Email Templates** in the Quick Find box and select it.

Create a New Folder for Templates:

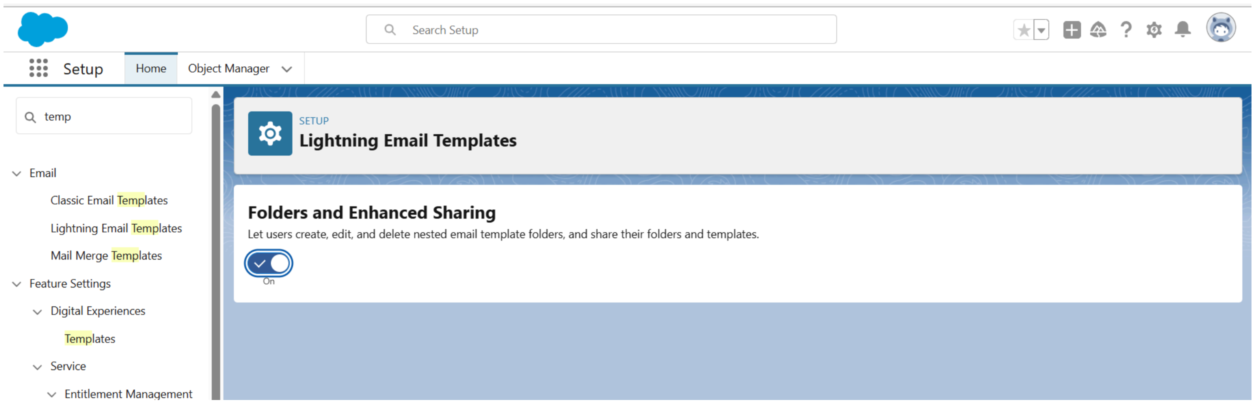
1. Open the **App Launcher** (grid icon in the top left corner).
2. Search for **Email Templates** and select it.
3. Click **New Folder**.
4. Enter a name for the folder and click **Save**.

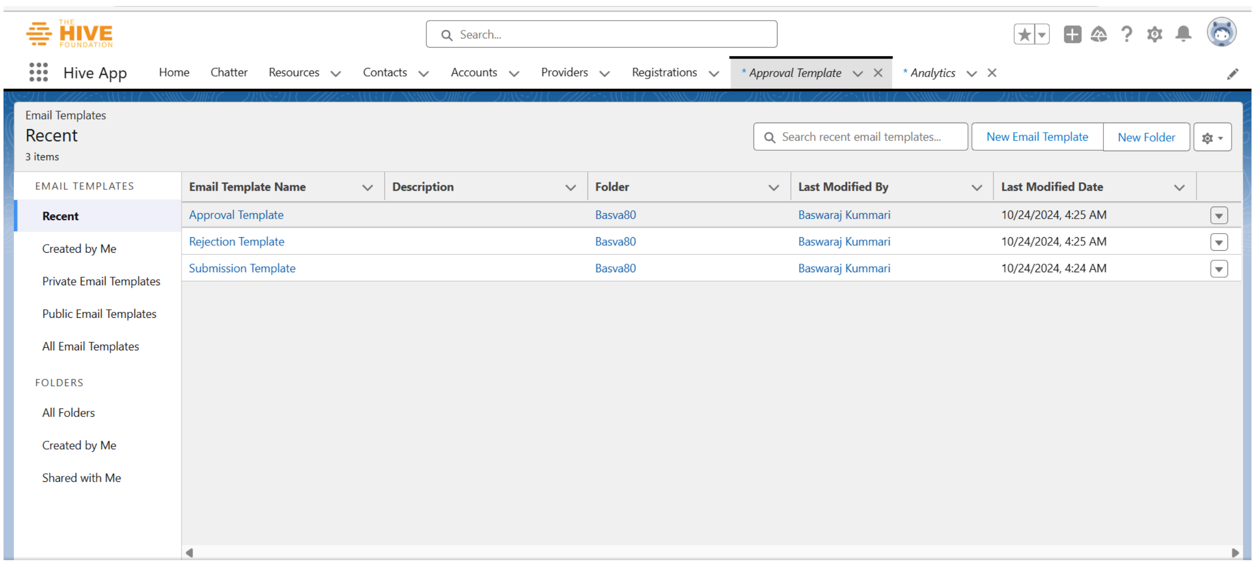
Create a New Email Template:

1. In the **Email Templates** section, click **New Email Template**.
2. Select the folder you created in the previous steps.

Configure the Email Template:

1. **Email Template Name**: Enter **Submission Template**.
2. **HTML Value**: Paste the specific HTML content or body text for your email template.





5.2 Create an Approval Process

Navigate to Approval Processes

1. Go to **Setup** (click the gear icon in the top right corner).

2. In the **Quick Find** box, enter **Approval Processes** and select it.

Select the Object

1. Under **Manage Approval Processes For**, select **Appointment.**

Create a New Approval Process

1. Click **New Approval Process** and select **Use Jump Start Wizard.**

Configure the Approval Process

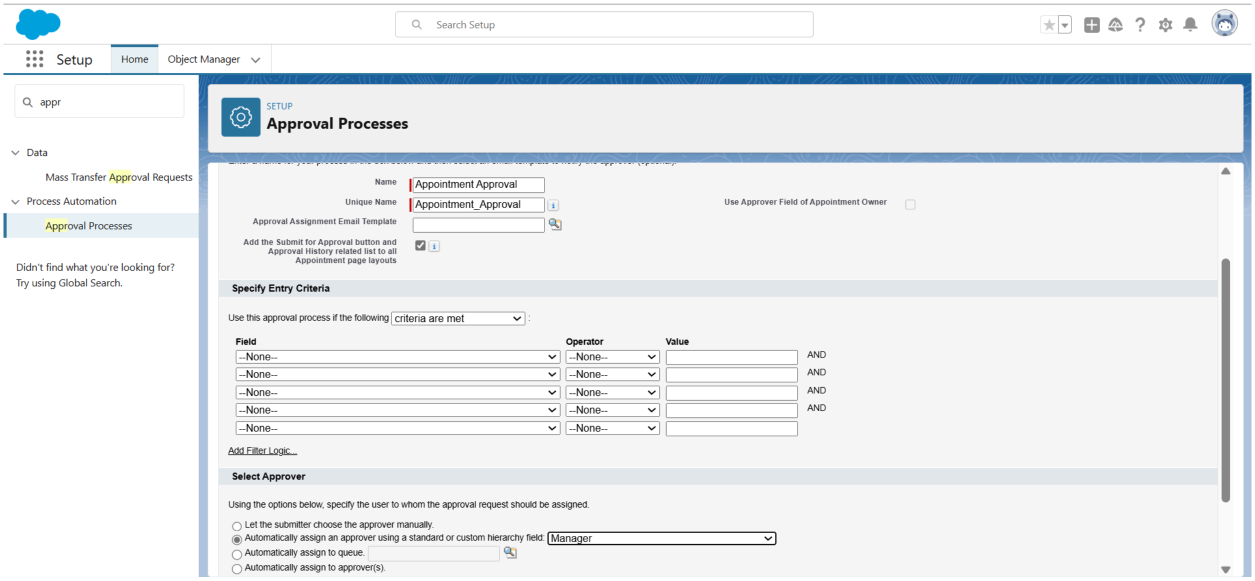
1. **Process Name**: Enter **Appointment Approval**.
2. **Description**: Enter **Rejection Notification Email Alert**.
3. **Unique Name**: Auto-populates.

Set Email Alert for Rejection Notification

1. **Email Template**: Select **Rejection Template**.
2. **Recipient Type**: Choose **Your Name.**
3. **Save** to finalize the rejection actions.

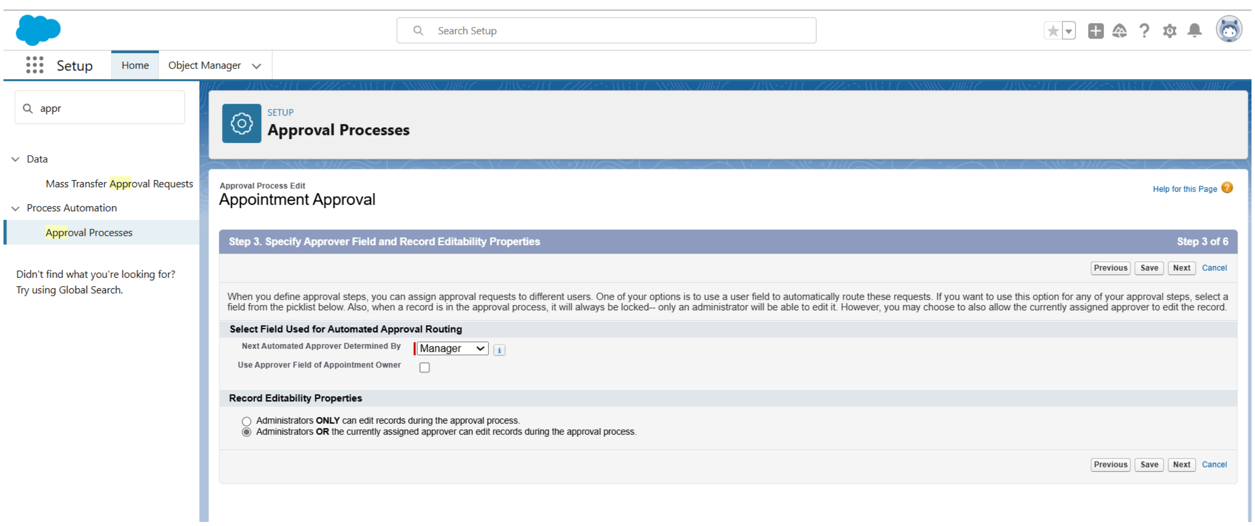
Select Approver

1. For the option **Automatically assign an approver using a standard or custom hierarchy field**, select **Manager**.
2. Click **Next**, and in the **Automated Approver Determined By** field, select **Manager** again.



Set Record Editability Properties

1. Under **Record Editability Properties**, choose **Administrators OR the currently assigned approver can edit records during the approval process**.
2. Click **Save** to complete the initial setup of the approval process



View Approval Process Details

1. Click **View Approval Process Detail Page.**

Configure Initial Submission Actions

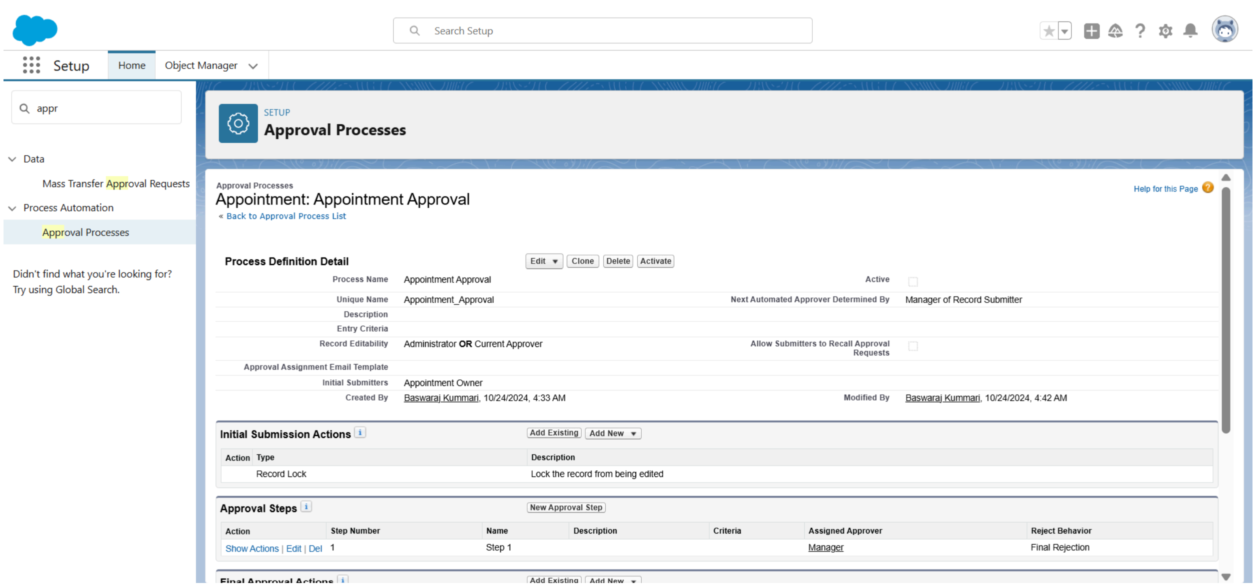
1. Under **Initial Submission Actions**, click **Add New**.

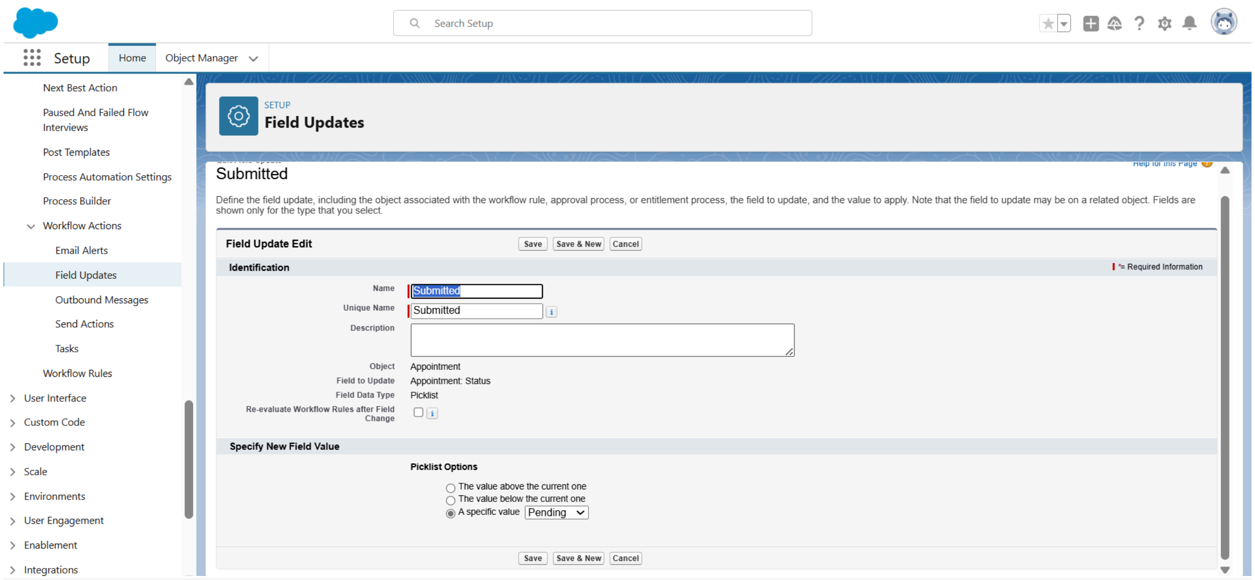
Add Field Update

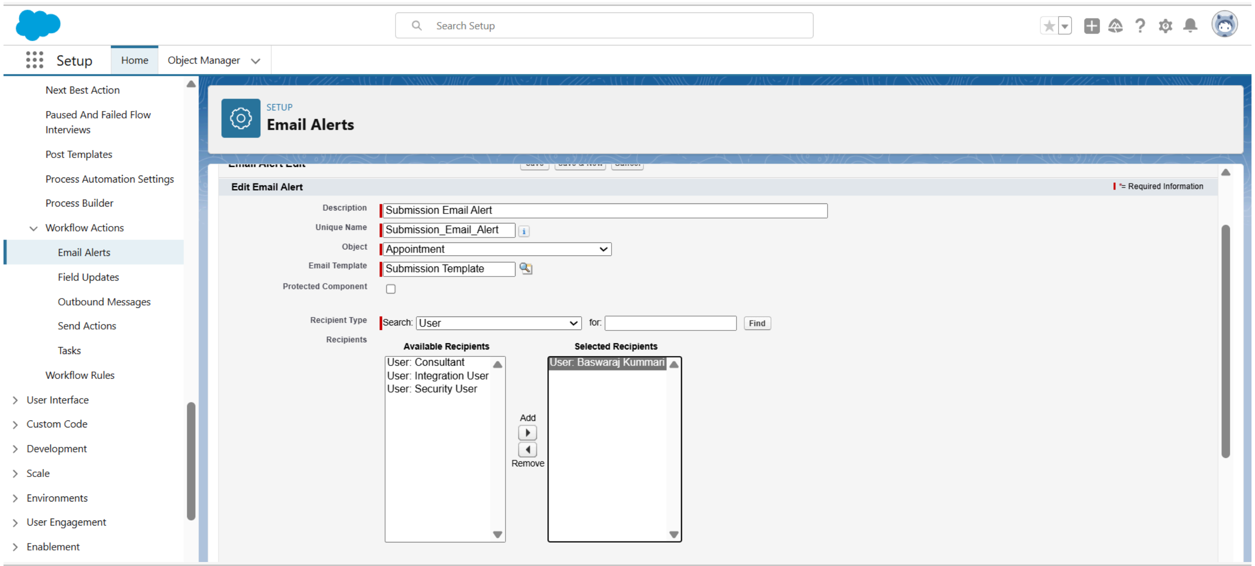
1. **Name**: Enter **Submitted**.
2. **Field to Update**: Select **Appointment: Status**.
3. **A Specific Value**: Enter **Pending**.
4. Click **Add New** again.

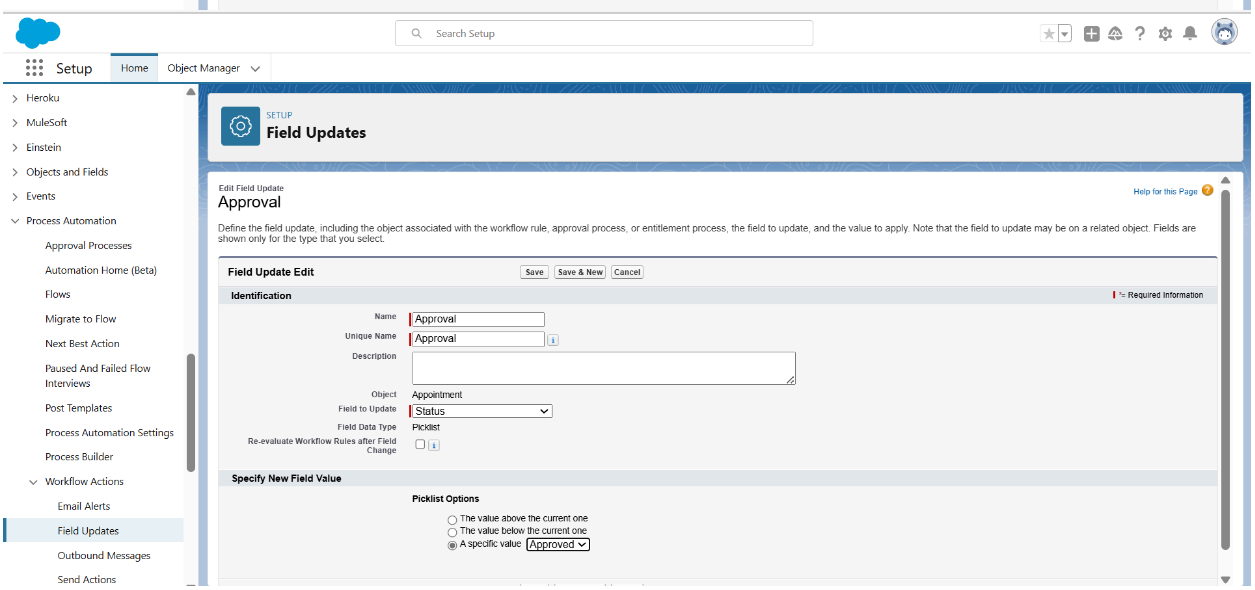
Add Email Alert for Submission

1. **Description**: Enter **Submission Email Alert**.
2. **Unique Name**: Auto-populates.
3. **Email Template**: Select **Submission Template**.
4. **Recipient Type**: Choose **Your Name**.




Search Setup
Setup
Home
Object Manager
Next Best Action
Paused And Failed Flow Interviews
Post Templates
Process Automation Settings
Process Builder
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
Tasks
Workflow Rules
User Interface
Custom Code
Development
Scale
Environments
User Engagement
Enablement
Integrations
SETUP
Field Updates
Submitted
Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.
Field Update Edit
Save
Save & New
Cancel
Identification
= Required Information
Name
Submitted
Unique Name
Submitted
Description
Object
Appointment
Field to Update
Appointment: Status
Field Data Type
Picklist
Re-evaluate Workflow Rules after Field Change
Specify New Field Value
Picklist Options
The value above the current one
The value below the current one
A specific value
Pending
Save
Save & New
Cancel


Search Setup
Setup
Home
Object Manager
Next Best Action
Paused And Failed Flow Interviews
Post Templates
Process Automation Settings
Process Builder
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
Tasks
Workflow Rules
User Interface
Custom Code
Development
Scale
Environments
User Engagement
Enablement
SETUP
Email Alerts
Edit Email Alert
= Required Information
Description
Submission Email Alert
Unique Name
Submission_Email_Alert
Object
Appointment
Email Template
Submission Template
Protected Component
Recipient Type
Search:
User
for:
Find
Recipients
Available Recipients
User: Consultant
User: Integration User
User: Security User
Add
Remove
Selected Recipients
User: Basvaraj Kummari


Search Setup
Setup
Home
Object Manager
Heroku
MuleSoft
Einstein
Objects and Fields
Events
Process Automation
Approval Processes
Automation Home (Beta)
Flows
Migrate to Flow
Next Best Action
Paused And Failed Flow Interviews
Post Templates
Process Automation Settings
Process Builder
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
SETUP
Field Updates
Edit Field Update
Approval
Help for this Page
Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.
Field Update Edit
Save
Save & New
Cancel
Identification
= Required Information
Name
Approval
Unique Name
Approval
Description
Object
Appointment
Field to Update
Status
Field Data Type
Picklist
Re-evaluate Workflow Rules after Field Change
Specify New Field Value
Picklist Options
The value above the current one
The value below the current one
A specific value
Approved

6.Create a Record Triggered Flow

6.1 Configure the Start Element

Navigate to Flows:

1. Go to **Setup** (click the gear icon in the top right corner).
2. Use the **Quick Find** box to search for **Flows.**

Create a New Flow:

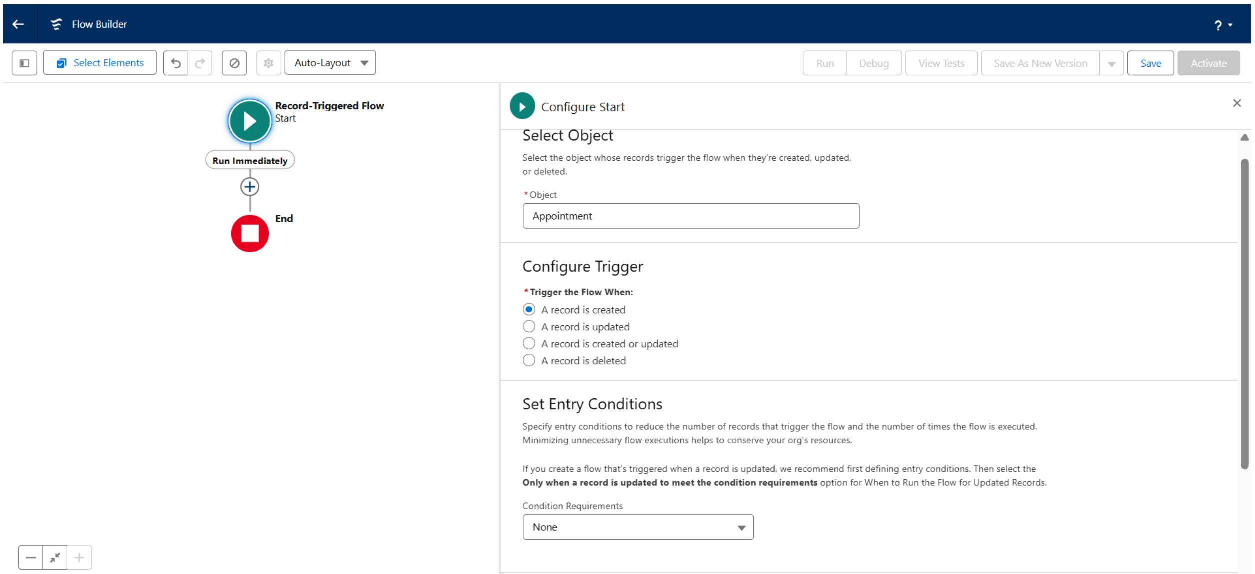
1. Click **New Flow**.
2. Select **Record-Triggered Flow** from the available flow options.
3. Click **Create.**

Configure the Start Element:

1. The **Configure Start** window will open.
2. **Object**: Select **Appointment** from the dropdown list.
3. **Trigger the Flow When**: Choose **A record is created** to trigger the flow when a new appointment record is created.
4. Ensure the flow configuration displays the selected object and trigger criteria correctly.

Click Done:

1. After configuring the Start element, click **Done** to proceed to the next step in the Flow Builder.



6.2 Add an Action Element

Add Action Element to the Flow:

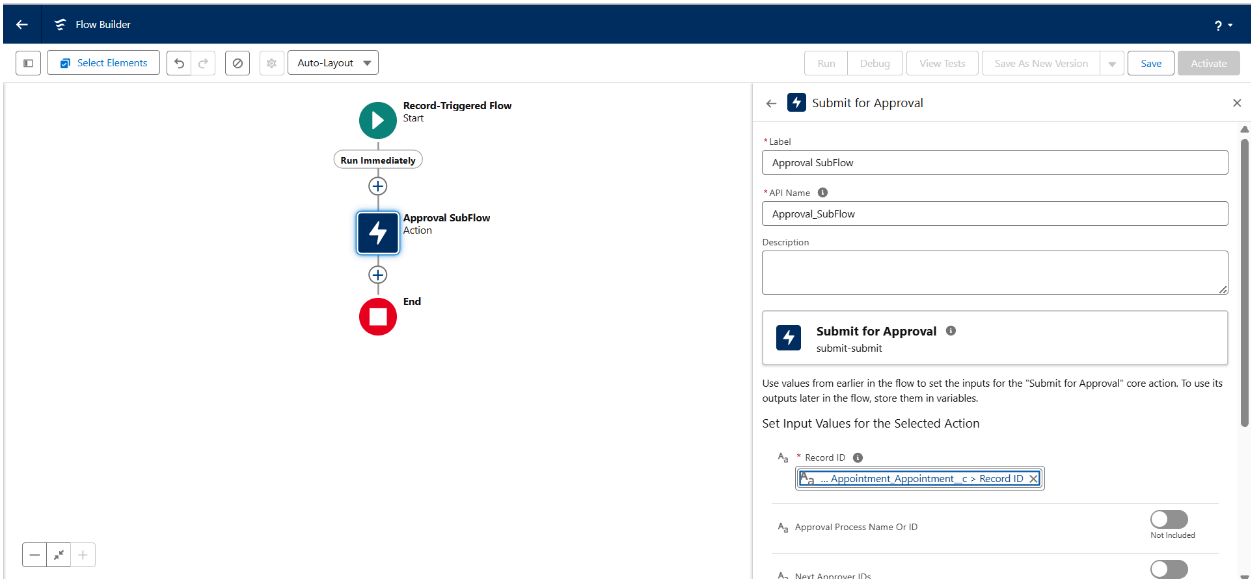
1. In the **Flow Builder**, drag an **Action** element from the left sidebar and place it after the **Start** element.

Configure the Action Element:

1. Click on the **Action** element to start configuring.
2. In the **RecordId** field, set the value to {!$Record.Id}. This setting uses the **ID** of the record that triggered the flow.

Save and Activate the Flow:

1. Click **Save** to save your flow.
2. After saving, activate the flow to put it into action.



7.Creating a Screen Flow For Existing Student to Block An Appointment

7.1 Add Screen Element

Navigate to Flow Builder:

1. Go to **Setup** (click the gear icon in the top right corner).
2. In the **Quick Find** box, type **Flow Builder** and select it.

Create a New Flow:

1. Click **New Flow**.
2. Select **Screen Flow** from the available flow types.
3. Click **Create** to start building the flow.

Add a Screen Element:

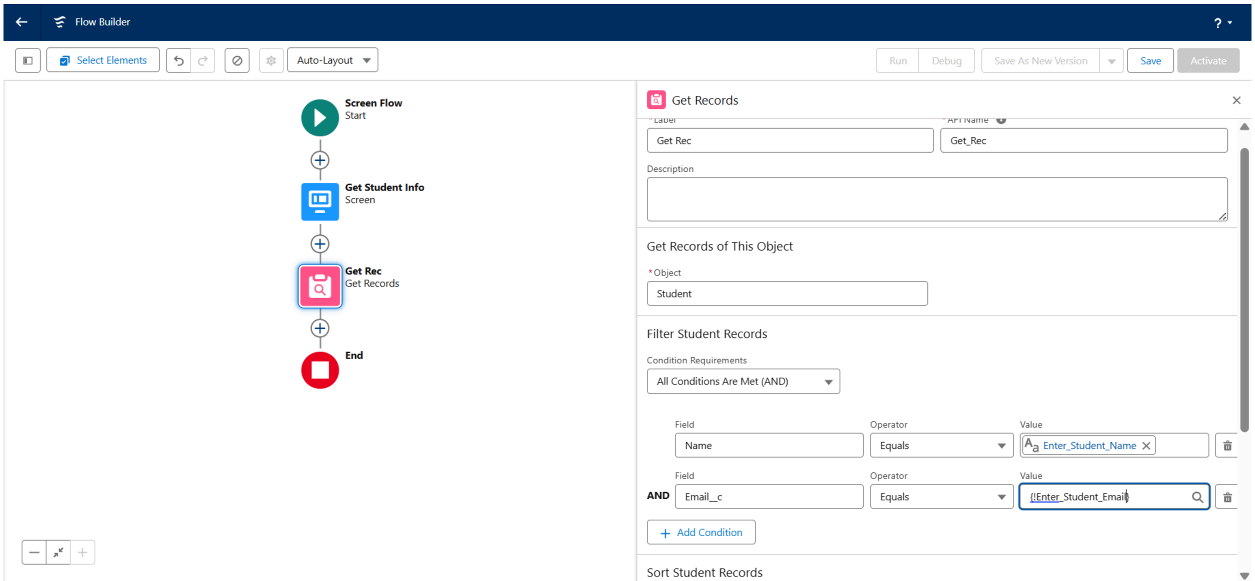
1. In the **Flow Builder**, drag a **Screen** element from the left sidebar to the canvas.

Configure the Screen Element:

1. **Screen Label**: Enter a label for the screen (e.g., "Student Registration Screen" or similar).
2. **Add Text Components**:
   - From the left sidebar, drag and drop two **Text** components onto the screen

element.

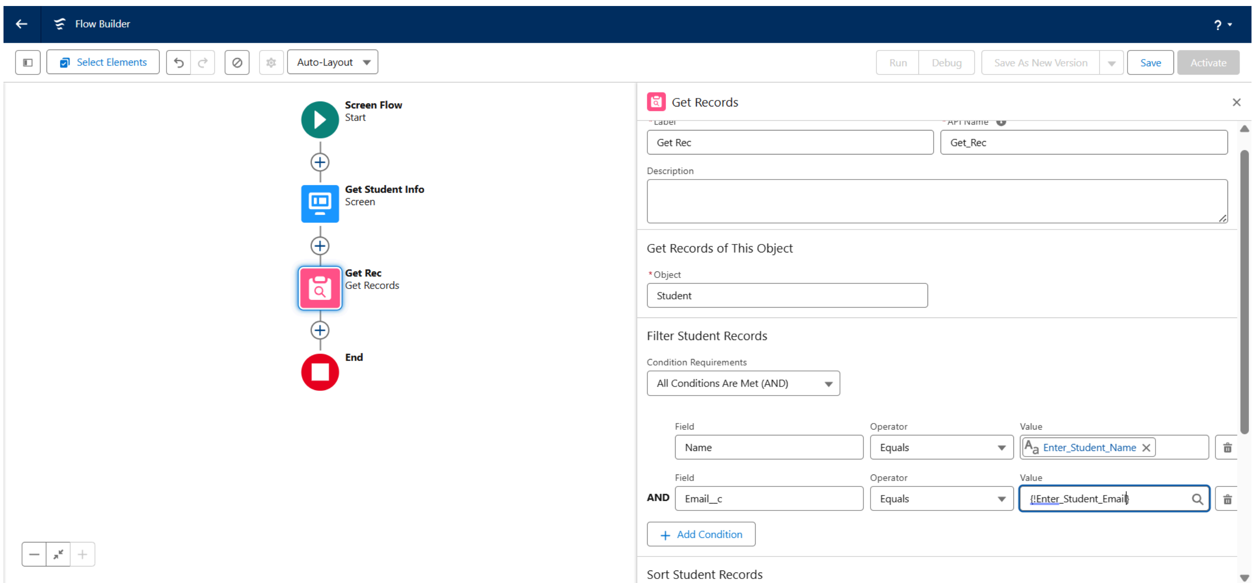
- Configure each Text component by labeling them appropriately (e.g., "First Name" and "Last Name").
- Customize further as needed, such as setting them as required fields.



7.2 Add GET Record Element

1. **Drag a Get Records Element**: In the Flow Builder, drag the **Get Records** element from the left sidebar to the canvas, placing it after the **Screen** element.
2. **Configure the Get Record Element**:
    - **Label**: Enter Get Rec.
    - **Object**: Select Student from the dropdown.
    - **Condition Requirements**: Choose **All Conditions Are Met (AND).**
3. **Define the Conditions**:
    - **Field**: Select Student Name.
    - **Operator**: Choose **Equals.**
    - **Value**: Set to (!Enter_Student_Name) (from the screen component).
    - **Field**: Select Email_c.
    - **Operator**: Choose **Equals.**
    - **Value**: Set to (!Enter_Student_Email) (from the screen component).

4. **Configure Record Output**:
    - **How Many Records to Store**: Choose **Only the first record** if you expect a single match.
    - **Store Record Data**: Choose to store the record's fields in a variable or use it directly in your flow.
5. **Save the Get Record Element**: Click **Done** to save the configuration.

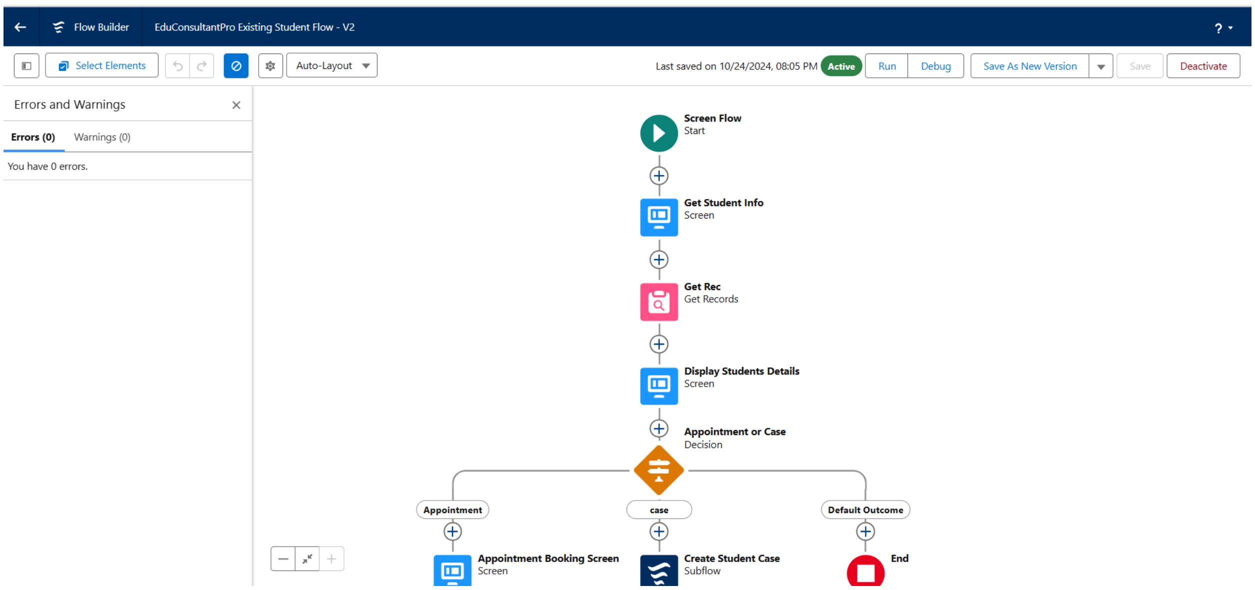


7.3 Add Decision Element

1. **Add Display Screen**:
    - Drag a **Screen** element with the label **Display Student Details** and include the necessary fields.
2. **Add a Decision Element**: Drag a **Decision** element from the left sidebar to the canvas, placing it after the **Display Student Details** screen.
3. **Configure the Decision Element**:
    - **Label**: Enter Appointment or Case.
4. **Define the Outcome for Appointment**:
    - **Outcome Label**: Enter Appointment.
    - **Resource**: Select {!How_may_I_Help_you} (variable capturing the user's selection).

- **Operator**: Choose **Equals.**
- **Value**: Enter {!Book_an_Appointment} (value for booking an appointment).

5. **Add Additional Outcomes for Case Options**:
   - Click the + icon to add another outcome.
   - **Outcome Label**: Enter Case.
   - **Resource**: Select {!How_may__Help_you}.
   - **Operator**: Choose **Equals.**
   - **Value**: Enter {!Raise_a_Case} (value for raising a case).
6. **Save the Decision Element**: Click **Done** to save.

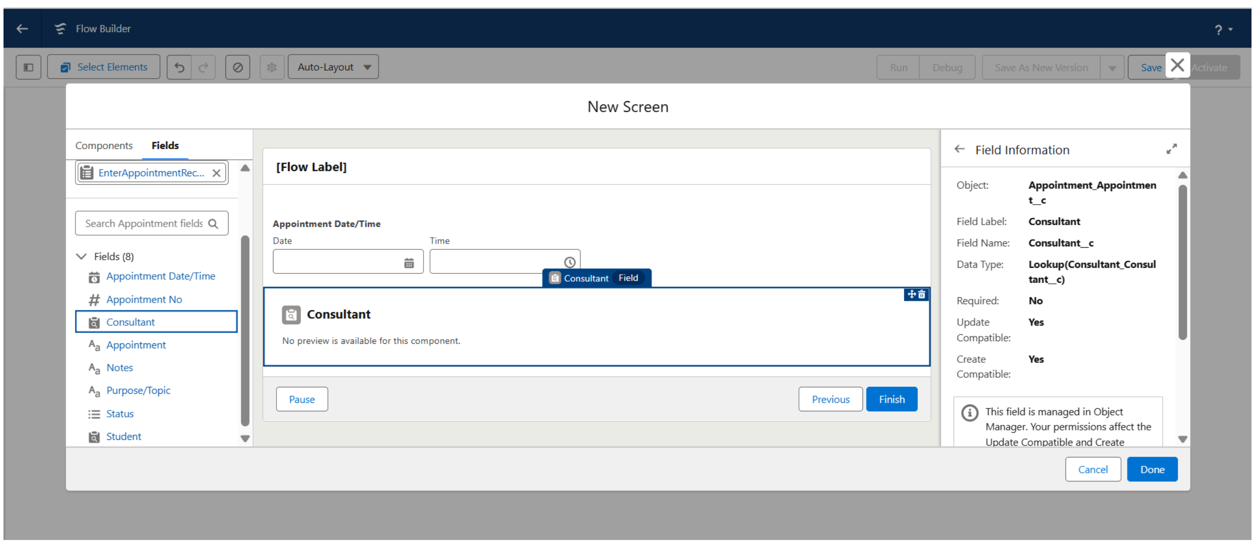


7.4 Add Appointment Booking Screen

1. **Add a Screen Element**: Drag a **Screen** element from the left sidebar to the canvas, placing it after the **Decision** element on the Appointment path.
2. **Configure the Screen Element**:
   - **Label**: Enter Appointment Booking Screen.
3. **Create a New Resource**:
   - **Resource Type**: Select Variable.

- **API Name**: Enter AppointmentRecordRes.
- **Data Type**: Select Record.
- **Object**: Select Appointment.

4. **Add Fields from the Appointment Object**:
   - Drag the necessary fields from the Appointment object to the screen, such as:
     - **Appointment Date**
     - **Appointment Time**
     - **Purpose**
     - **Consultant**
     - **Student Name**
5. **Save the Screen Element**: Click **Done**.

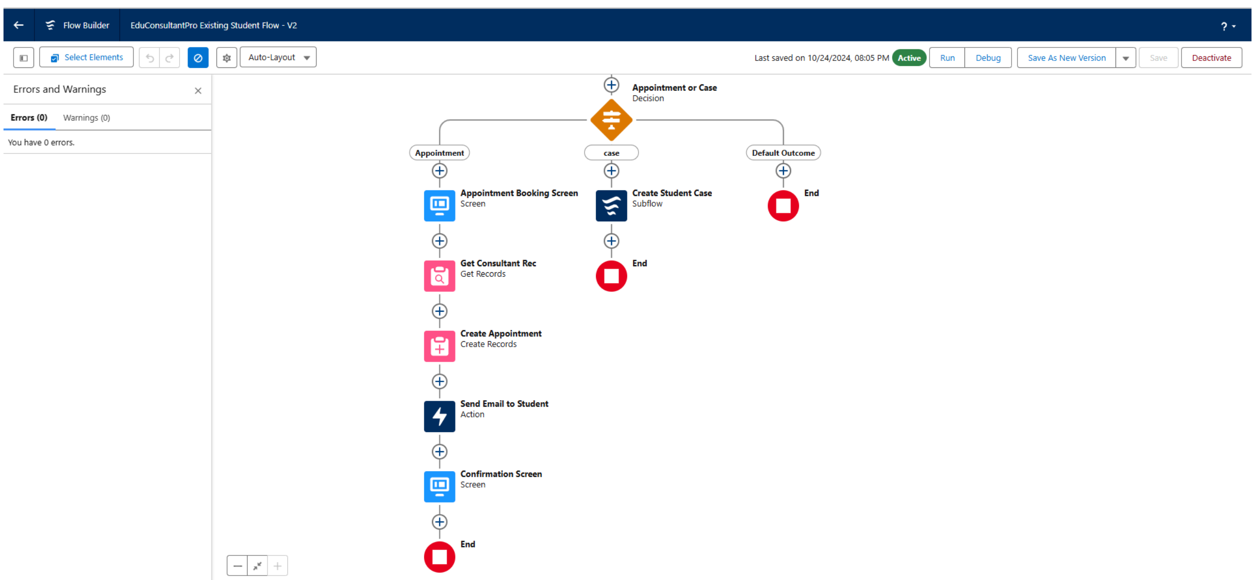


7.5 Add GET Consultant Record Element

1. **Add a Get Records Element**: Drag a **Get Records** element from the left sidebar to the canvas, placing it after the **Appointment Booking Screen** on the Appointment path.
2. **Configure the Get Records Element**:
   - **Label**: Enter Get Consultant Rec.
   - **Object**: Select Consultant.
3. **Define the Condition Requirements**:

- **Condition Requirements**: Choose **All Conditions Are Met (AND).**
- **Field**: Select Name.
- **Operator**: Choose **Equals.**
- **Value**: Set to {!AppointmentRecordRes.Consultant_Name_c} (field capturing the consultant's name from the appointment record).

4. **Configure Record Output**:
    - **How Many Records to Store**: Choose **Only the first record** if you expect a single match.
    - **Store Record Data**: Select an appropriate option based on your flow requirements.
5. **Save the Get Records Element**: Click **Done**.

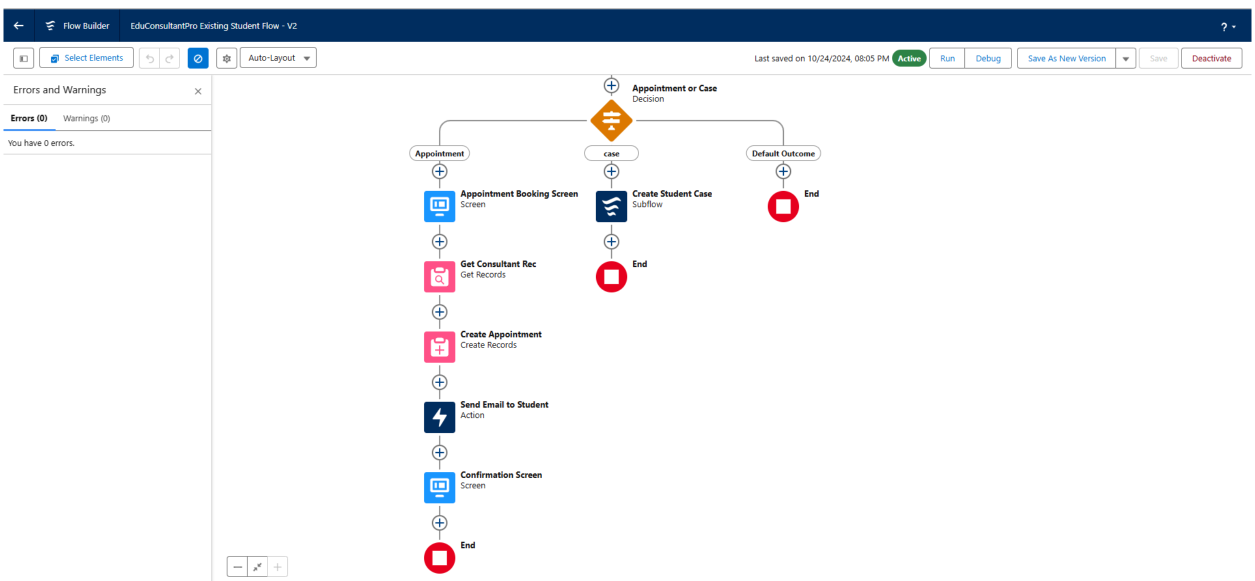


7.6 Create Appointment Record

1. **Add a Create Records Element**: Drag a **Create Records** element from the left sidebar to the canvas, placing it after the **Get Consultant Rec** element.
2. **Configure the Create Records Element**:
    - **Label**: Enter Create Appointment.
    - Configure the fields and values based on the details captured in the previous steps

7.8 Add SubFlow Element

1. **Drag a SubFlow Element**: Place it after the **Decision** element on the Case path.
2. **Configure the SubFlow Element**:
    - **Label**: Enter Create Student Case.
    - **Flow**: Search for and select the subflow named Create a Case.
3. **Save the Flow**:
    - Click **Save.**
    - **Flow Label**: Enter EduConsultantPro Existing Student Flow.
    - **API Name**: Auto-populates based on the flow label.
4. **Activate the Flow**: Click **Activate** to make the flow active.



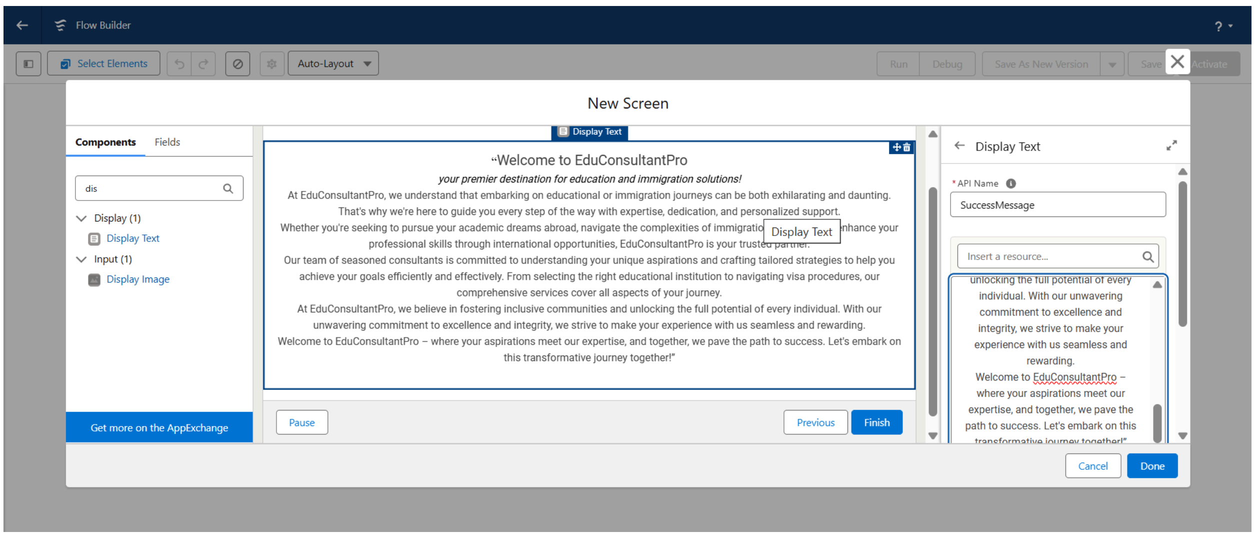
8.Creating a ScreenFlow to combine all the Flows at One Place

8.1 Add Welcome Screen

1. **Add a Screen Element**: Drag a **Screen** element from the left sidebar to the canvas.
    - **Label**: Enter Welcome Screen.
2. **Add Display Text Component**:
    - From the left panel, drag the **Display Text** component to the main panel.

- **Label**: Enter SuccessMessage.

3. **Add Welcome Message**:
   - In the Display Text component, paste the text:
   - **Save the Display Text Component**: Click **Done** to save the Display Text component.
   - **Save the Screen Element**: Click **Done** to save the **Welcome Screen**.

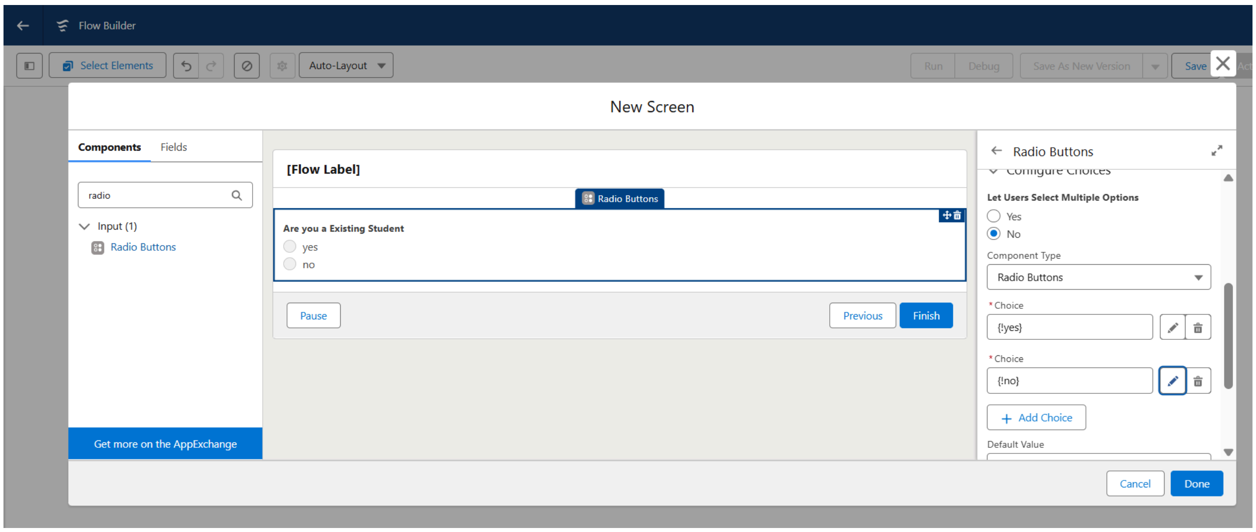


8.2 Add Existing or New Student Confirmation Screen

1. **Add a Screen Element**: Drag another **Screen** element from the left sidebar to the canvas and place it after the **Welcome Screen** element.
   - **Label**: Enter Existing or New Student Confirmation Screen.
2. **Add Radio Button Component**:
   - From the left panel, drag the **Radio Buttons** component to the main panel.
   - **Label**: Enter Are you an Existing Student.
3. **Add Choice Options**:
   - Click on **Add Choice**.
     - **Label**: Enter Yes.
     - Click **Create Yes Choice**.
   - Click **Add Choice** again.

- **Label**: Enter No.
- Click **Create No Choice.**

4. **Save the Radio Button Component**: Click **Done** to save the **Radio Buttons** component.
5. **Save the Screen Element**: Click **Done** to save the **Existing or New Student Confirmation Screen.**

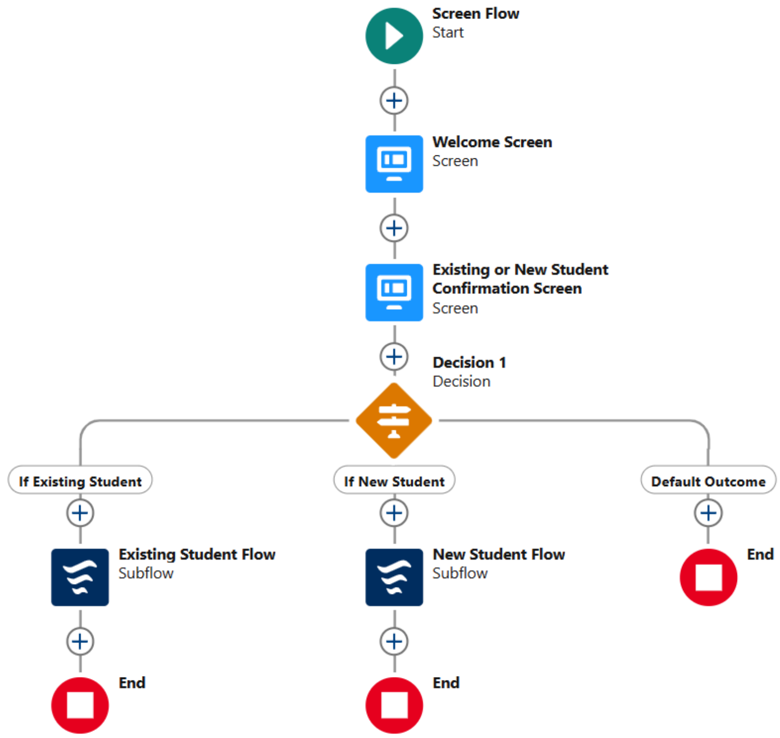


8.3 Add Decision Element

1. **Add a Decision Element**: Drag a **Decision** element from the left sidebar to the canvas and place it after the **Existing or New Student Confirmation Screen**.
   - **Label**: Enter Decision 1.
2. **Configure Outcome for Existing Student**:
   - **Outcome Label**: Enter If Existing Student.
   - **Condition**:
     - **Resource**: Select {!Are_you_a_Existing_Student} (from the radio button component).
     - **Operator**: Equals
     - **Value**: Yes.
3. **Configure Outcome for New Student**:
   - **Outcome Label**: Enter If New Student.

- **Condition**:
  - **Resource**: Select {!Are_you_a_Existing_Student}.
  - **Operator**: Equals
  - **Value**: No.

4. **Save the Decision Element**: Click **Done** to save the **Decision 1** configuration.



8.4 Add Subflow Element for Existing Student

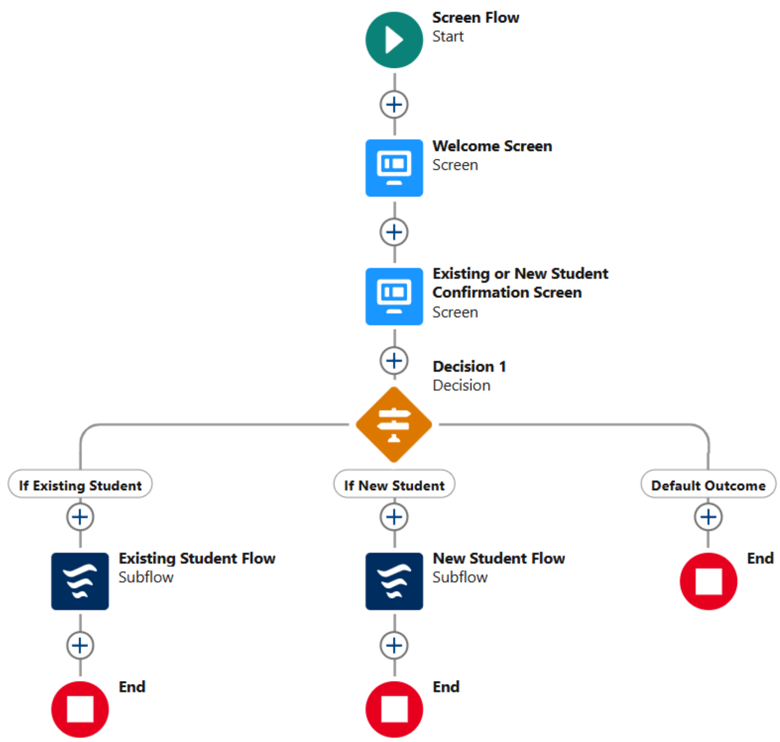
1. **Add a Subflow Element**: Drag a **Subflow** element from the left sidebar to the canvas, placing it on the **If Existing Student** path.
   - **Label**: Enter Existing Student Flow.
2. **Configure the Subflow**:
   - **Subflow Selection**: Search for and select EduConsultantPro Existing Student Flow.
3. **Save the Subflow Element**: Click **Done** to save the **Existing Student Flow** subflow element.

8.5 Add Subflow Element for New Student

1. **Add a Subflow Element**: Drag another **Subflow** element from the left sidebar to the canvas, placing it on the **If New Student** path.
   - **Label**: Enter New Student Flow.
2. **Configure the Subflow**:
   - **Subflow Selection**: Search for and select EduConsultantPro Student Flow.
3. **Save the Subflow Element**: Click **Done** to save the **New Student Flow** subflow element.

Final Save and Activation

1. **Save the Entire Flow**:
   - **Flow Label**: Enter EduConsultPro Flow.
2. **Activate the Flow**: After saving, click **Activate** to make the flow live.



9.Create a LightingApp Page

1. Create a New Lightning Home Page

1. **Go to Setup**: Click on the gear icon in the top right corner.

2. **Enter App Builder** in the Quick Find box and select **Lightning App Builder**.
3. **Click New**: Choose **Home Page** as the page type, then click **Next.**
4. **Name the Page**: Enter EduConsultPro Home Page.
5. **Select Template**: Choose the **Standard Home Page** template, then click **Finish.**

2. Configure the Home Page

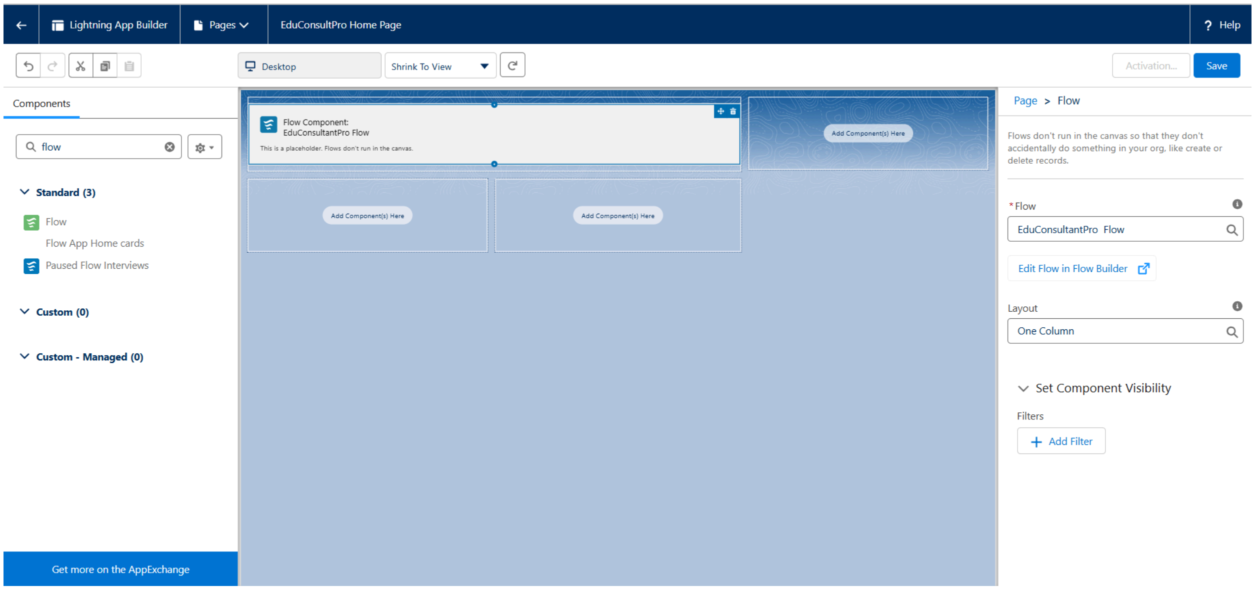
1. **Add Components**:
   - Drag and drop relevant components (e.g., **Today's Tasks**, **Recent Items**, **Reports**, **List Views** for tracking students or appointments) to your desired layout.
   - Place the **EduConsultPro information or welcome message** in the top section of the page to make it highly visible.
   - Position **consultant-related components** (like **Today's Events** or **Top Consultants**) in the side region.

3. Save and Activate the Page

1. **Click Save**: Save your page after arranging all components.
2. **Activate the Page**:
   - Click **Activate** in the top right corner of the page editor.
   - Select **App and Profile Assignment.**

4. Assign to Apps and Profiles

1. **Select Apps**: Choose the **Sales** app, then click **Next.**
2. **Select Profiles**:
   - Scroll down and select the **System Administrator** profile.
   - Click **Next** to confirm the selection.
3. **Review and Save**:
   - Review the assignments and click **Save**.



10.Conclusion

In conclusion, the Campus Assist project will serve as a pivotal advancement for EduConsultPro Institute, setting a new standard in administrative efficiency and student service through Salesforce CRM. By centralizing and automating key processes in admissions, consulting services, and immigration case management, EduConsultPro will be better equipped to meet the needs of its growing student body while maintaining high levels of service quality and responsiveness.

The project's data-driven capabilities will empower the institute to make strategic, informed decisions, continually enhancing its offerings and optimizing resource allocation. Students will benefit from a seamless, transparent experience at each stage of their journey, reinforcing EduConsultPro's reputation as a forward-thinking, student-focused institution.

Ultimately, Campus Assist positions EduConsultPro to scale efficiently and provide exceptional support, ensuring that the institution remains competitive and responsive to the evolving landscape of higher education. As EduConsultPro continues to grow, *Campus Assist* will serve as the foundation of a sophisticated, student-centered support system that drives long-term success and satisfaction.