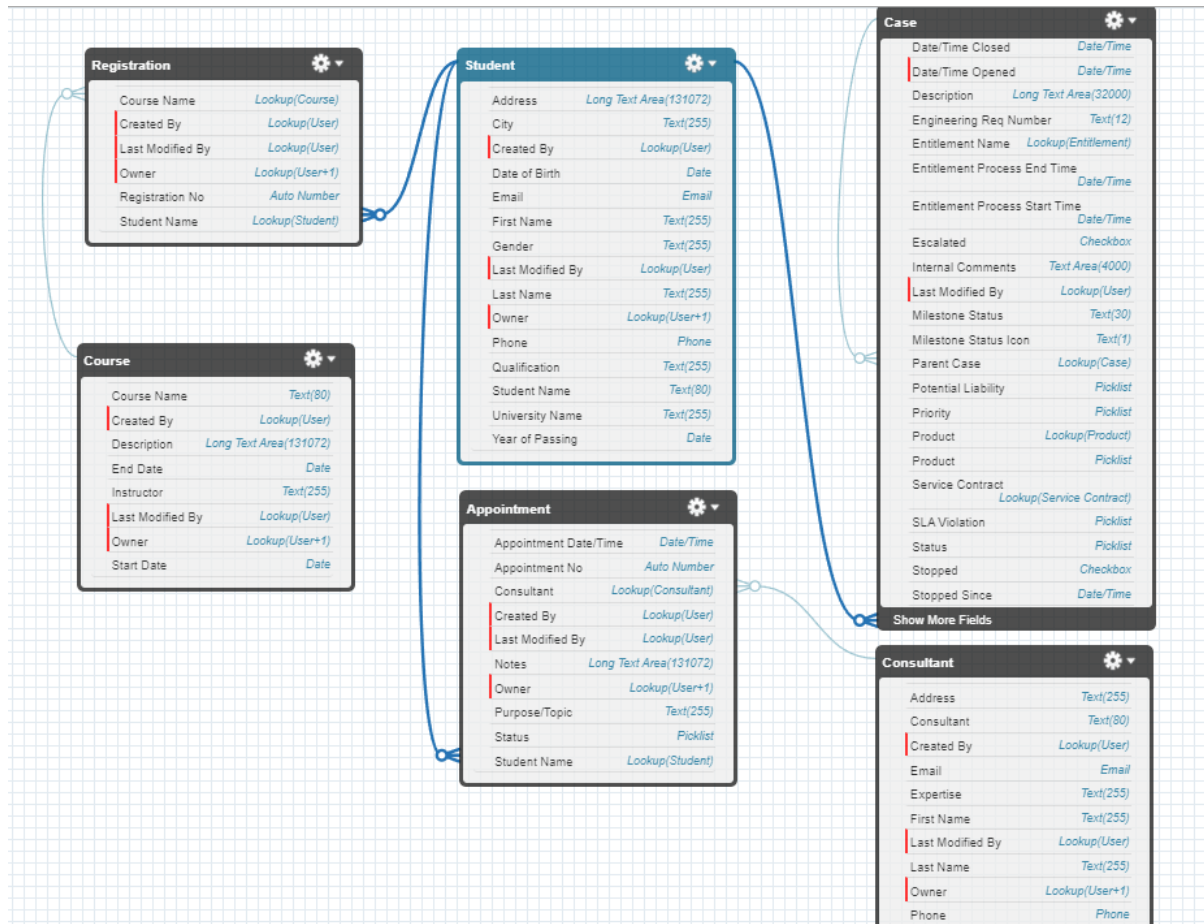


## Milestone 1:- Create Objects from Spreadsheet.

### Create Relationship among the objects



## Milestone 2:- Create a Screen Flow for Student Admission Application process.

## Add Screen Element

Edit Screen

Components

Fields

Search components...

Input (53)

Action Button (Beta)

Add Attendees

Address

Call Script

Cancel Appointment

Checkbox

Checkbox Group

Choice Lookup

Get more on the AppExchange

EduConsultantPro Student Flow

First Name

Last Name

Email

Phone

Screen Properties

\* Label

Student Info

\* API Name ⓘ

Student\_Info

Description

> Configure Header

> Configure Footer

Cancel

Done

## Create Student Record using Create Element

Create Records

\* Label

Create Student Record

\* API Name ⓘ

Create\_Student\_Record

Description

\* How to set record field values

From a Record Variable

How Many Records to Create

☒ One

☐ Multiple

Create a Record from These Values

\* Record

StudentRecordRes

Make sure that ID is blank. After the flow creates the records, ID is set to match the record that was created. ⓘ

## Add Screen Element

Components

Fields

Search components...

Input (53)

Action Button (Beta)

Add Attendees

Address

Call Script

Cancel Appointment

Checkbox

Checkbox Group

Choice Lookup

Get more on the AppExchange

EduConsultantPro Student Flow

Picklist

Select Course

--None--

Pause

Previous

Finish

Picklist

Picklist

\* Choice

{!IELTS}

\* Choice

{!GRE}

\* Choice

{!GMAT}

\* Choice

{!Duolingo}

\* Choice

{!TOEFL}

Cancel

Done

## Add Decision Element

Decision

\* Label

Selecting Course

\* API Name

SelectingCourse

Description

Outcomes

For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER

+

Selected IELTS

Selected GRE

Selected GMAT

Selected Duolingo

Selected TOEFL

Default Outcome

OUTCOME DETAILS

Delete Outcome

\* Label

Selected IELTS

\* Outcome API Name

Selected\_IELTS

Condition Requirements to Execute Outcome

All Conditions Are Met (AND)

Resource

Course Screen > Select\_Course

Operator


Equals

Value

IELTS

+ Add Condition

## Add GET Record Element

 Get Records ×

\* Label

Get IELTS Rec

\* API Name ⓘ

Get\_IELTS\_Rec

Description

Get Records of This Object


\* Object

Course

Filter Course Records

Condition Requirements

All Conditions Are Met (AND) ▼


Field	Operator	Value	
Course_Name__c	Equals ▼	Aa Select_Course X	

+ Add Condition

Sort Course Records

Sort Order

## Create Registration Record using Create Records Element

 Create Records ×

\* Label

Create IELTS Registration Rec

\* API Name ⓘ

Create\_IELTS\_Registration\_Rec

Description

\* How to set record field values

Manually ▼

Create a Record of This Object

\* Object

Registration

Set Field Values for the Registration

Field

Course\_Name\_\_c

←

Value

Aa Course from Get\_IELTS\_Rec > Record ID ×

🗑️

Field

Student\_Name\_\_c

←

Value

Aa StudentRecordRes > Record ID ×

🗑️

+ Add Field

## Create Email Text Template Variables For Email Body And Subject

### Edit Text Template

\* API Name ⓘ

StuRegistrationEmailTextTempSub

Description

\* Body ⓘ

Insert a resource... 🔍

View as Plain Text ▼

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

Cancel

Done

## Add an action Element

### Send Email

\* Label

Send Email to Student

\* API Name 


Send\_Email\_to\_Student

Description

 **Send Email**   
emailSimple-emailSimple

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

### Set Input Values for the Selected Action

 Add Threading Token to Body

  
Not Included

 Add Threading Token to Subject

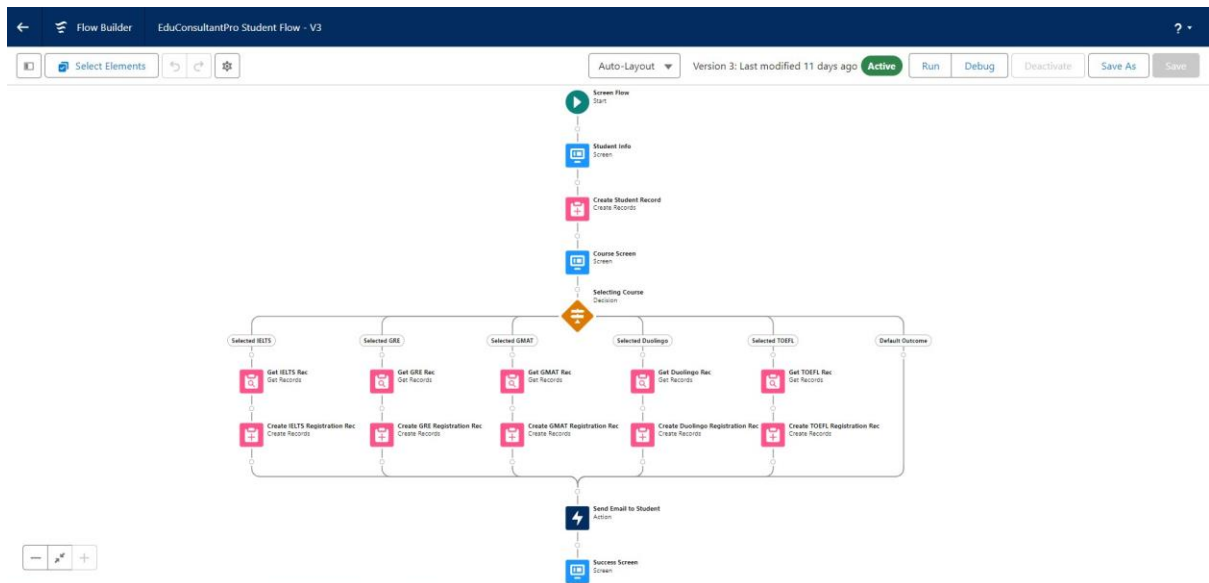
  
Not Included

A<sub>a</sub> Body 

 StuRegistrationEmailTextTempBody 

  
Included

## Add screen element



## Milestone 3:- Create Users

### Configure the User Settings

**Approver Settings**

Delegated Approver

Manager

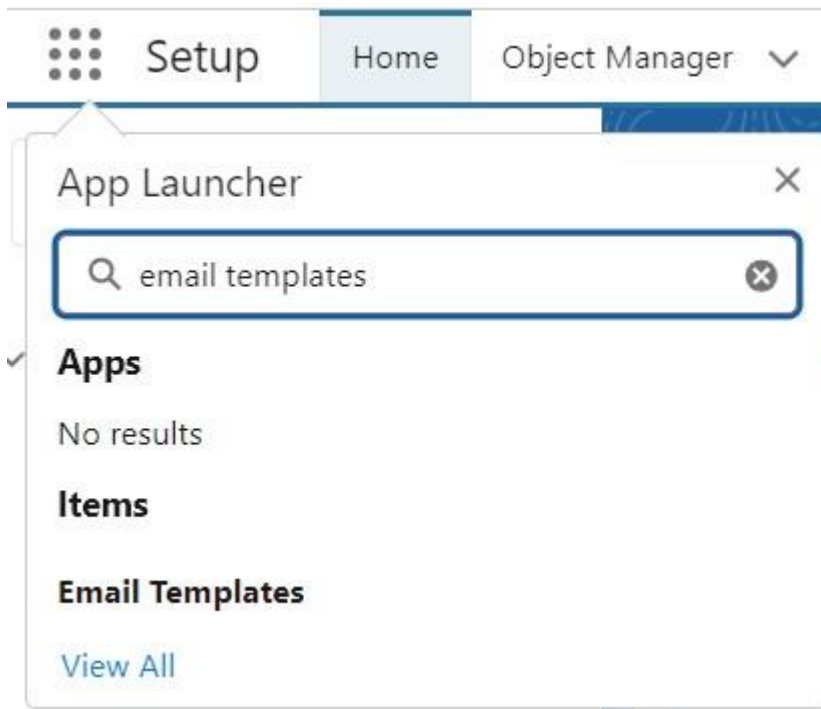
Receive Approval Request Emails

☐ Generate new password and notify user immediately

## Milestone 4:- Create an Approval Process for Property Object

### Create an Email Template





### Edit Submission Template

\* = Required Information

#### Information

*Email Template Name <input type="text" value="Submission Template"/>	Related Entity Type <input type="text" value="Appointment"/>
Description <input type="text"/>	Folder <input type="text" value="EduConsult Templates"/> <a href="#">Select Folder</a>

#### Message Content

Subject <input type="text" value="Appointment Confirmation and Details"/>	Enhanced Letterhead <input type="text" value="Search Enhanced Letterheads..."/>
--	--

HTML Value

[Source](#) [Font](#) [Size](#) **B** *I* U A

[Cancel](#) [Save](#)

**Create an approval process**

Initial Submission Actions <sup>1</sup>			Add Existing	Add New <sup>▼</sup>
Action	Type	Description		
	Record Lock	Lock the record		Task
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	Update the field		Email Alert
<a href="#">Edit</a>   <a href="#">Remove</a>	Email Alert	Send an email alert		Field Update
		Submit the record		Outbound Message
		Submission Email Alert		

## Milestone 5 :- Create a Record Triggered Flow

### Configure the Start Element

Configure Start

#### Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

\* Object

#### Configure Trigger

\* Trigger the Flow When:

☒ A record is created  
☐ A record is updated  
☐ A record is created or updated  
☐ A record is deleted

#### Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

\* Optimize the Flow for:

##### Fast Field Updates


Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

##### Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

### Add an action element

 Edit Submit for Approval  
approval subflow (*approval\_subflow*)

\* Label

approval subflow

\* API Name


approval\_subflow

Description

Use values from earlier in the flow to set the inputs for the "Submit for Approval" core action. To use its outputs later in the flow, store them in variables.

Set Input Values for the Selected Action

A<sub>a</sub>

\* Record ID 

{!\$Record.Id}

A<sub>a</sub>

Approval Process Name Or ID

Don't Include

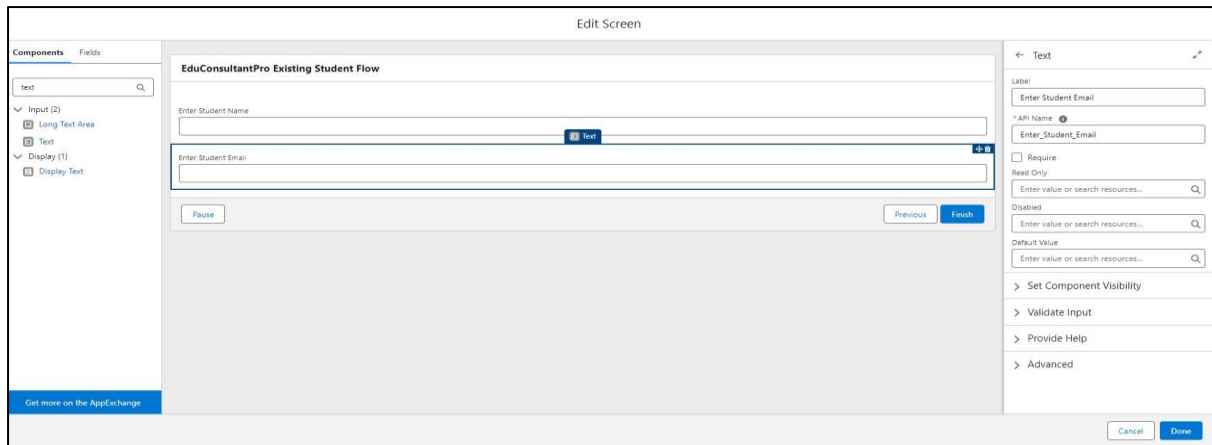
A<sub>a</sub>

Next Approver IDs

Don't Include

## **Milestone6:-Create a ScreenFlow for Existing Student to Book an Appointment**

### **Add Screen Element**



## Add a Get record element

**Get Records**
✕

\* Label

Get Rec

\* API Name ⓘ

Get\_Rec

Description

Get Records of This Object

\* Object

Student

Filter Student Records

Condition Requirements

All Conditions Are Met (AND) ▼

Field	Operator	Value
Student_Name__c	Equals ▼	<div>Enter_Student_Name</div> ✕
AND		
Email__c	Equals ▼	<div>Enter_Student_Email</div> ✕

+ Add Condition

Sort Student Records

Sort Order

## Add a Decision Element

Decision

\* Label

Appointment or Case

\* API Name

Appointment\_or\_Case

Description

Outcomes

For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER

Appointment

Case

Default Outcome

OUTCOME DETAILS

\* Label

Appointment

\* Outcome API Name

Appointment

Condition Requirements to Execute Outcome

All Conditions Are Met (AND)

Resource

...

Details > How\_may\_I\_Help\_you

Operator

Equals

Value

...

Book\_an\_Appointment

+ Add Condition

Delete Outcome

## Add a screen element

Edit Screen

Components

Fields

① Add record fields to your screen. [More Info](#)

\* Record Variable

AppointmentRecordRes

Search Appointment fields

Fields (8)

Appointment Date/Time

Appointment No

Consultant

Appointment

Notes

Purpose/Topic

Status

EduConsultantPro Existing Student Flow

Appointment Date/Time

Purpose/Topic

Pause

Previous

Finish

Screen Properties

\* Label

Appointment Booking Screen

\* API Name

Appointment\_Booking\_Screen

Description


> Configure Header

> Configure Footer

Cancel

Done

## Add a get record element

 Get Records

\* Label

Get Consultant Rec

\* API Name ⓘ

Get\_Constantant\_Rec

Description

Get Records of This Object

\* Object

Consultant

Filter Consultant Records

Condition Requirements

All Conditions Are Met (AND) ▼



Field

Operator

Value

Name

Equals ▼


 AppointmentRecordRes > Co... 

+ Add Condition

Sort Consultant Records

Sort Order

Not Sorted ▼

 If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

☒ Only the first record

☐ All records

How to Store Record Data

☒ Automatically store all fields

## Create Appointment Record using Create Records Element

Create Records

\* Label

Create Appointment

\* API Name

Create\_Appointment

Description

\* How to set record field values

Manually

Create a Record of This Object

\* Object

Appointment

Set Field Values for the Appointment

Field	Appointment_DateTime__c	Value	AppointmentRecordRes > Appointment Date/...
Field	Consultant__c	Value	Consultant from Get_Consultant_Rec > Record...
Field	Notes__c	Value	AppointmentRecordRes > Notes
Field	PurposeTopic__c	Value	AppointmentRecordRes > Purpose/Topic
Field	Student__c	Value	Student from Get_Rec > Record ID

+ Add Field

## Add screen element

Edit Screen

Components

Fields

Search components...

Input (53)

Action Button (Beta)

Add Attendees

Address

Call Script

Cancel Appointment

Checkbox

Get more on the AppExchange

EduConsultantPro Existing Student Flow

Display Text

Consultant Name : {!Get\_Consultant\_Rec.Name},  
Date & Time : {!AppointmentRecordRes.Appointment\_DateTime\_\_c},  
Notes : {!AppointmentRecordRes.Notes\_\_c}

Pause

Previous

Finish

Display Text

\* API Name

Appointment\_Confirmation


Insert a resource...

Consultant Name :  
!{Get\_Consultant\_Rec.Name},  
Date &  
Time : !{AppointmentRecordRes.Appointm  
ent\_DateTime\_\_c},  
Notes : !{AppointmentRecordRes.Notes\_\_c}


Cancel

Done

## Add a Sub flow element


 Create a Case ×


\* Label

\* API Name 


Description

Referenced Flow

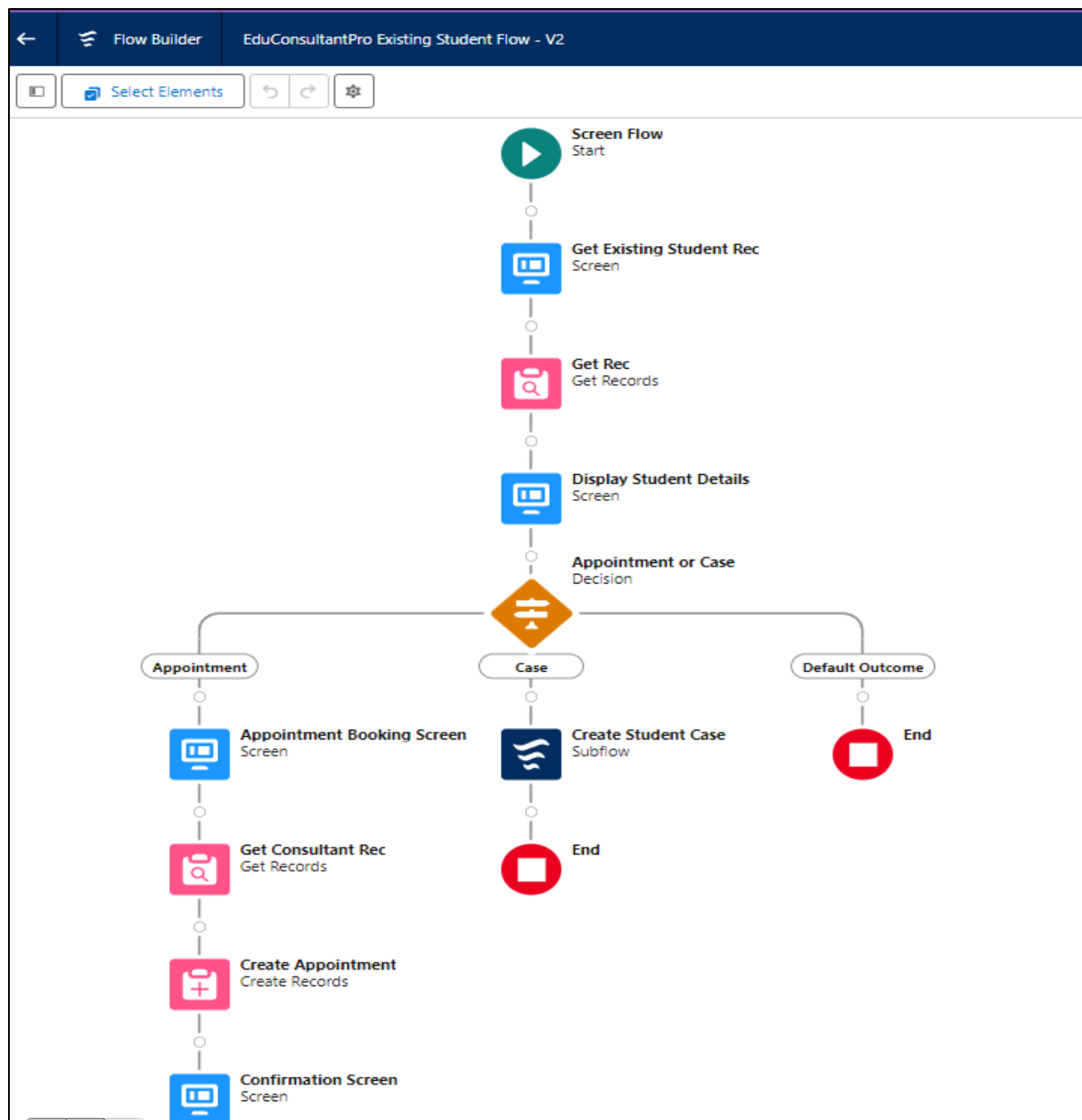
 **Create a Case**  
setup\_service\_experience\_\_Create\_Case



Use values from the parent flow to set the inputs for the "Create a Case" flow. By default, the parent flow stores all outputs. You can either reference outputs via the API name of the Subflow element or manually assign variables in the parent flow to store individual outputs from the "Create a Case" flow.

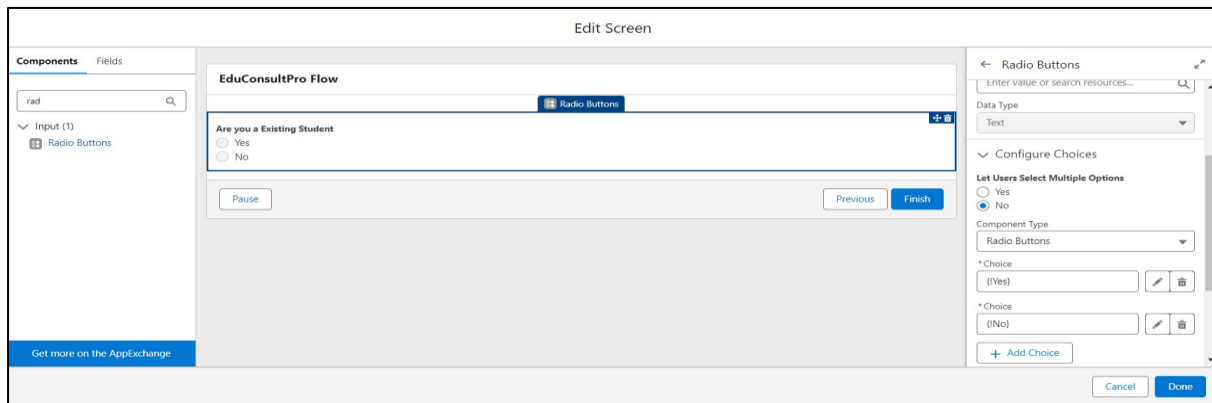






**Milestone 7:- Create a ScreenFlow to Combine all the flows at one place**

## Add Screen Element



## Add a decision element

Decision

✕

\* Label

Decision\_1

\* API Name ⓘ

Decision\_1

Description

Outcomes

For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER ⓘ +

OUTCOME DETAILS

Delete Outcome

⋮ If Existing Student

\* Label

If Existing Student

\* Outcome API Name ⓘ

If\_Existing\_Student

⋮ If Not Existing user

Condition Requirements to Execute Outcome

All Conditions Are Met (AND) ▼

Default Outcome

Resource

Operator

Value

⊞ ... > Are\_you\_a\_Existing\_Student ✕


Equals ▼

⊞ Yes ✕


✕

+ Add Condition

## Add a subflow element


 EduConsultantPro Existing Student Flow


\* Label

\* API Name 

Description

Referenced Flow

 **EduConsultantPro Existing Student Flow**  
EduConsultantPro\_Existing\_Student\_Flow



## Add a Subflow element



EduConsultantPro Student Flow

\* Label

New Student Flow

\* API Name ⓘ

New\_Student\_Flow

Description

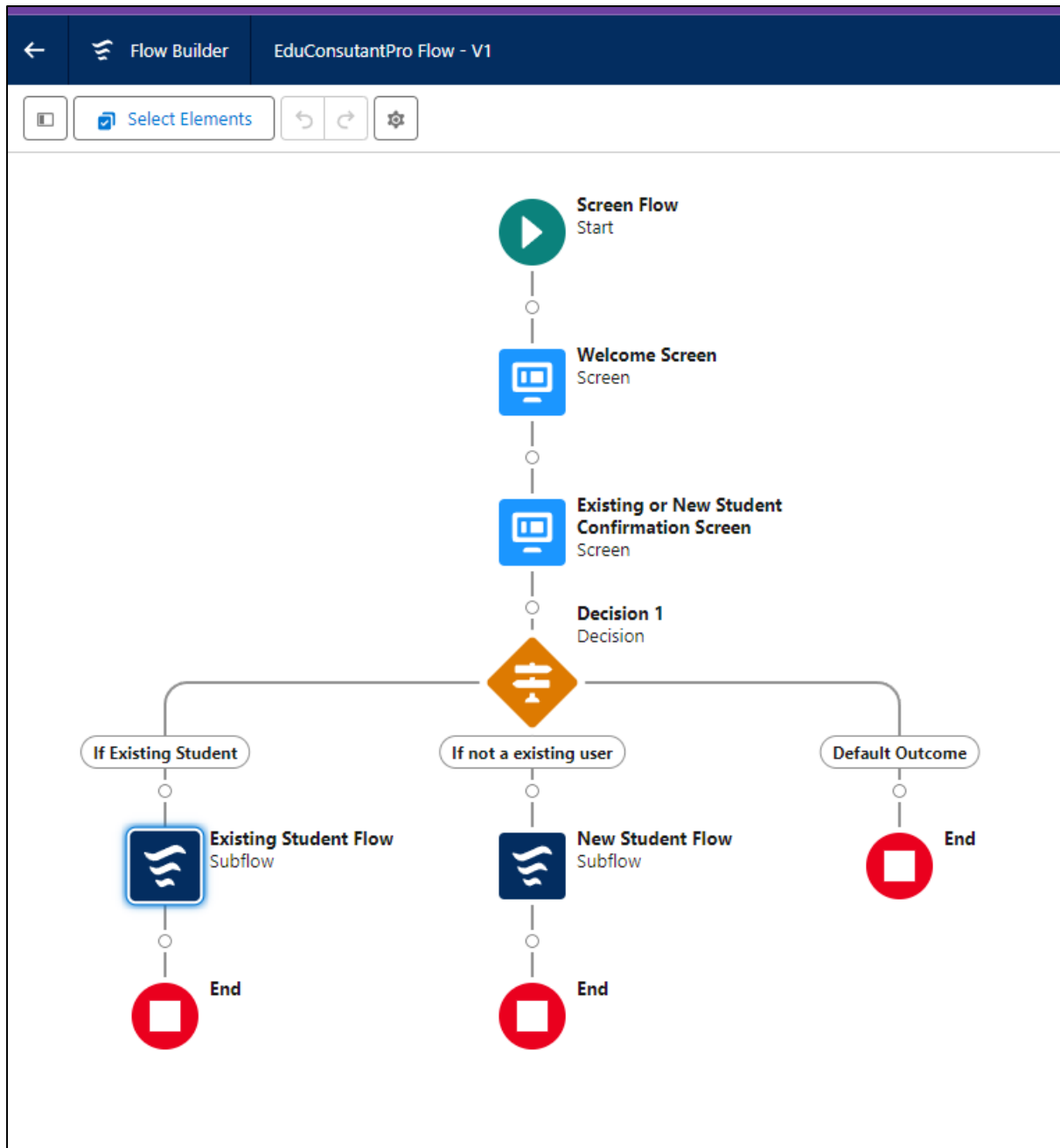
Referenced Flow



**EduConsultantPro Student Flow**

EduConsultantPro\_Student\_Flow





### **Milestone 8:- Create a lightning app page**

**Create a lightning app page and make it available at the application**

# Create a lightning app page

