

A CRM Application to Manage the Services offered by an Institution

1. Project Overview

This project is focused on developing EduConsultPro, a Salesforce CRM-based application designed to streamline the operations of EduConsultPro Institute. The primary challenge addressed is managing and optimizing processes related to student admissions, inquiries, and expert consulting services.

The goal is to deliver a comprehensive solution by leveraging Salesforce CRM capabilities, including customized objects, flows, and user-friendly interfaces. Through this project, we aim to enhance operational efficiency, user experience, and data accuracy, supporting the institute's long-term goals of providing seamless and efficient services to students and consultants.

2. Objectives

Business Goals

- Streamline the admission and consultation processes at EduConsultPro Institute.
- Enhance the efficiency of managing student inquiries and appointments.
- Provide a centralized platform for tracking student and consultant interactions.

Specific Outcomes

- Develop and implement a Salesforce CRM application with custom objects for managing Students, Courses, Appointments, Consultants, and Registrations.
- Design and execute automated flows for new and existing student registration, case creation, and appointment management.
- Improve data accuracy by integrating validation mechanisms and lookup relationships between objects.
- Ensure user accessibility by creating a responsive application that supports both

desktop and mobile platforms.

- Enable seamless communication with students through automated email notifications.

3.Salesforce Key Features and Concepts Utilized

1. Custom Objects

- Created objects for Students, Courses, Appointments, Consultants, Cases, and Registrations to manage data effectively.
- Established lookup relationships between objects to link related records seamlessly (e.g., Student-Appointment and Student-Case).

2. Flows

- Implemented various screen and autolaunched flows, including:
 - EduConsultPro Flow: Determines if a student is new or existing and initiates appropriate subflows.
 - EduConsultPro Student Flow: Handles new student registrations, course selection, and email notifications.
 - EduConsultantPro Existing Student Flow: Fetches existing student details and facilitates appointments or case creation.
 - EduConsultPro Approval Flow: Automates approval processes.

3. Validation and Data Accuracy

- Integrated validation rules and field requirements to ensure accurate data entry.

4. Automation

- Automated email notifications for key events, such as course registration confirmations.

5. User Management

- Configured roles and profiles, including creating a user for the Consultant role with tailored permissions.

6. Lightning App Builder

- Designed the EduConsultPro app for desktop and mobile platforms, incorporating navigation items such as Home, Appointment, Registration, Case, Student, Course, and Consultant.

7. Trailhead Integration

- Leveraged Trailhead modules to gain knowledge and guidance on Salesforce development and features.

8. Testing and Debugging

- Utilized the Run and Debug options to validate flow functionality and identify issues during development.

4.Detailed Steps to Solution Design

- Custom Objects Created:
 - Student: Stores student details (e.g., Name, Email, Phone, Address).
 - Course: Tracks course offerings (e.g., Course Name, Description, Fees).
 - Appointment: Manages consultations with consultants, linked to students and consultants via lookup relationships.
 - Consultant: Stores consultant details (e.g., Name, Expertise).
 - Registration: Stores course enrollment data linked to students and courses.
 - Case: Captures student inquiries and issues related to immigration or visa applications.
- Key Relationships:
 - Student → Appointment: Lookup Relationship.
 - Student → Case: Lookup Relationship.
 - Student → Registration → Course: Registration object links Student and Course.

TASK AND SCREENSHOTS:

Created the Custom Object using Spreadsheet & Relationship

Course Object :

Fields:

Course Name(Text)

Description(Text)

Start Date(Date)

End Date(Date)

Instructor(Text)

The screenshot shows the Salesforce Object Manager interface for the 'Course' object. The left sidebar lists various setup options under 'Fields & Relationships'. The main area displays the 'Fields & Relationships' section with a table showing eight items. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course Name	Name	Text(80)		✓
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		

Consultant Object:

Fields:

Address(Long Text Area)

Email>Email)

Expertise(Text)

First Name(Text)

Last Name(Text)

Phone(Phone)

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The page title is 'SETUP > OBJECT MANAGER' and the object name is 'Consultant'. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' and displays a table of 10 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The indexed column contains checkmarks for several fields.

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:

Fields:

- Student Name(Text)
- First Name(Text)
- Last Name(Text)
- Date of Birth(Date)
- Email(Email)
- Gender(Checkbox)
- Address(Long Text Area)
- City(Text)
- Phone(Phone)
- Qualification(Text)
- University Name(Text)
- Year of Passing(Number)

Student - Skill Wallet X | SI-7569-1731560658 X | Student | Salesforce X | Salesforce CRM Project X | (54) Atrangi Re: Rait Zara X | Salesforce_Internship_By_S X | +

stjosephengineeringcollege-ad-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000001kzpV/FieldsAndRelationships/view

Sign in

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Student

Fields & Relationships 16 items, Sorted by Field Label

Created By	CreatedBy	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	LastModifiedBy	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)
Year of Passing	Year_of_Passing__c	Date

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

Appointment Object:

Fields:

Appointment Date/Time(Date/Time)

Appointment No(Number)

Notes(Long TextArea)

Purpose(Text)

Status(Picklist)

The screenshot shows the Salesforce Object Manager interface for the 'Student' object. The left sidebar lists various setup options like Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area displays the 'Fields & Relationships' section with 17 items, sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Long Text Area(131072)		
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)		
Immigration/Visa Case	Immigration_Visa_Case__c	Lookup(Case)		
Last Modified By	LastModifiedById	Lookup(User)		
Last Name	Last_Name__c	Text(255)		

Registration Object:

The screenshot shows the Salesforce Setup interface, specifically the Object Manager for the 'Registration' object. The left sidebar lists various configuration options under 'Fields & Relationships'. The main content area displays the 'Fields & Relationships' table with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course Name	Course_Name__c	Lookup(Course)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Registration Name	Name	Text(80)		✓
Registration No	Registration_No__c	Auto Number		
Student Name	Student_Name__c	Lookup(Student)		✓

Case Type And Case Status Configuration

The screenshot shows two separate configurations for the Case object in the Salesforce Setup.

Case Type Picklist Values:

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Electrical	Electrical	<input type="checkbox"/>	Assigned dynamically	Chehan KS, 25/11/2024, 9:01 am
Edit Del Deactivate	Electronic	Electronic	<input type="checkbox"/>	Assigned dynamically	Chehan KS, 25/11/2024, 9:01 am
Edit Del Deactivate	Structural	Structural	<input type="checkbox"/>	Assigned dynamically	Chehan KS, 25/11/2024, 9:01 am
Edit Del Deactivate	Immigration	Immigration	<input type="checkbox"/>	Assigned dynamically	Chehan KS, 25/11/2024, 2:28 pm
Edit Del Deactivate	Visa Application	Visa Application	<input type="checkbox"/>	Assigned dynamically	Chehan KS, 25/11/2024, 2:28 pm

Case Status Picklist Values:

Action	Values	API Name	Closed	Default	Chart Colors	Modified By
Edit Deactivate	New	New	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assigned dynamically	Chehan KS, 25/11/2024, 9:01 am
Edit Del Deactivate	Working	Working	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Chehan KS, 25/11/2024, 9:01 am
Edit Del Deactivate	Escalated	Escalated	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Chehan KS, 25/11/2024, 9:01 am
Edit Del Deactivate	Closed	Closed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Chehan KS, 25/11/2024, 9:01 am
Edit Del Deactivate	Open	Open	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Chehan KS, 25/11/2024, 2:30 pm
Edit Del Deactivate	In-progress	In-progress	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Chehan KS, 25/11/2024, 2:30 pm

Create a Lightning App

Screenshot of the Lightning App Builder showing the "App Details & Branding" section.

App Details & Branding

App Details

- *App Name: EduConsultPro
- *Developer Name: EduConsultPro

App Branding

- Image: A small thumbnail of a building icon.
- Primary Color Hex Value: #0070D2

Description

Enter a description...

Org Theme Options

Use the app's image and color instead of the org's custom theme

App Launcher Preview



Screenshot of the Lightning App Builder showing the "Navigation Items" section.

App Settings

Navigation Items

Available Items

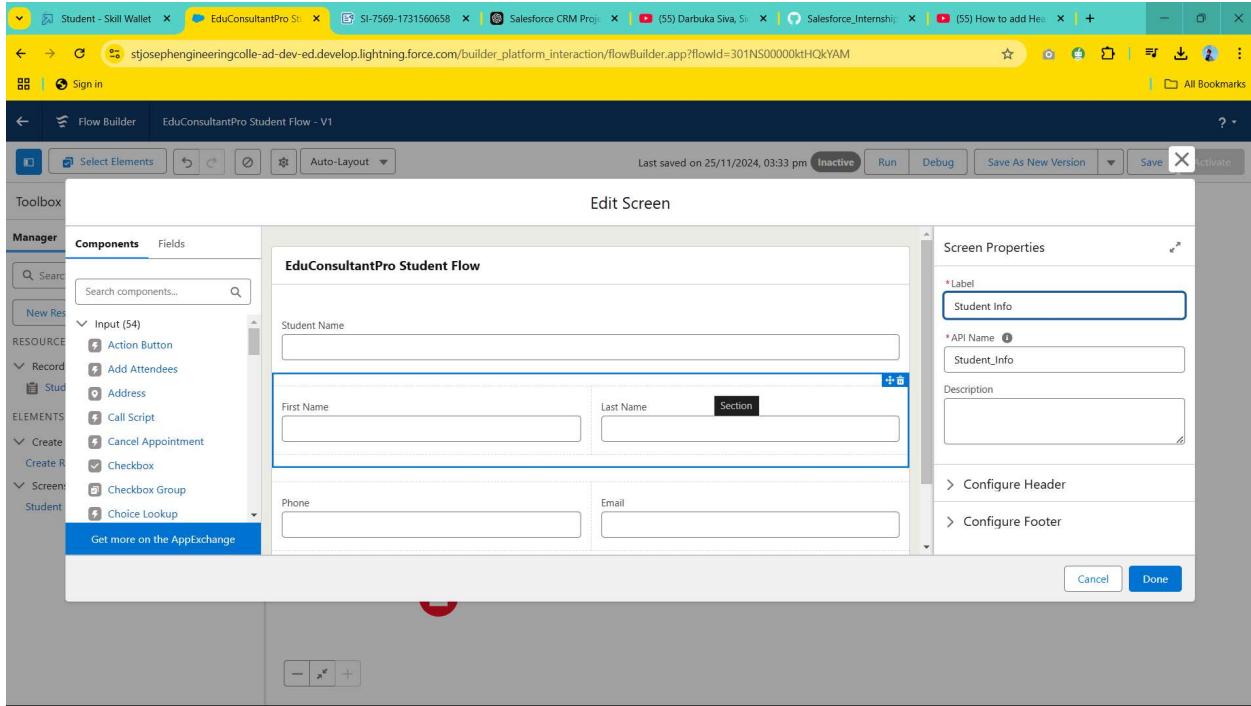
- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods

Selected Items

- Home
- Students
- Courses
- Consultants
- Appointments
- Cases
- Registrations

Create a ScreenFlow for Student Admission Application process.

Add Screen Element



Create Student Record using Create Element

The screenshot shows the Salesforce Flow Builder interface with the title "EduConsultantPro Student Flow - V2". A green banner at the top right indicates "Version 2 was created" on 25/11/2024, 03:43 pm. The flow diagram consists of the following steps:

```
graph TD; Start((Screen Flow Start)) --> Info[Student Info Screen]; Info --> Create[Create Student Record]; Create --> End((End))
```

The "Create Student Record" step is highlighted with a blue border. The "Create Records" configuration pane on the right is open, showing:

- Label:** Create Student Record
- API Name:** Create_Student_Record
- Description:** (empty)
- How to set record field values:** From a Record Variable
- How Many Records to Create:** One (radio button selected)
- Create a Record from These Values:** Record: StudentRecordRes
- Note:** Make sure that ID is blank. After the flow creates the records, ID is set to match the record that was created.
- Update Existing Record:** Disabled (switch is off)

Add Screen Element:

The screenshot shows the Salesforce Flow Builder interface with the title "EduConsultantPro Student Flow - V3". The "Edit Screen" dialog is open, displaying a "Picklist" component with the following configuration:

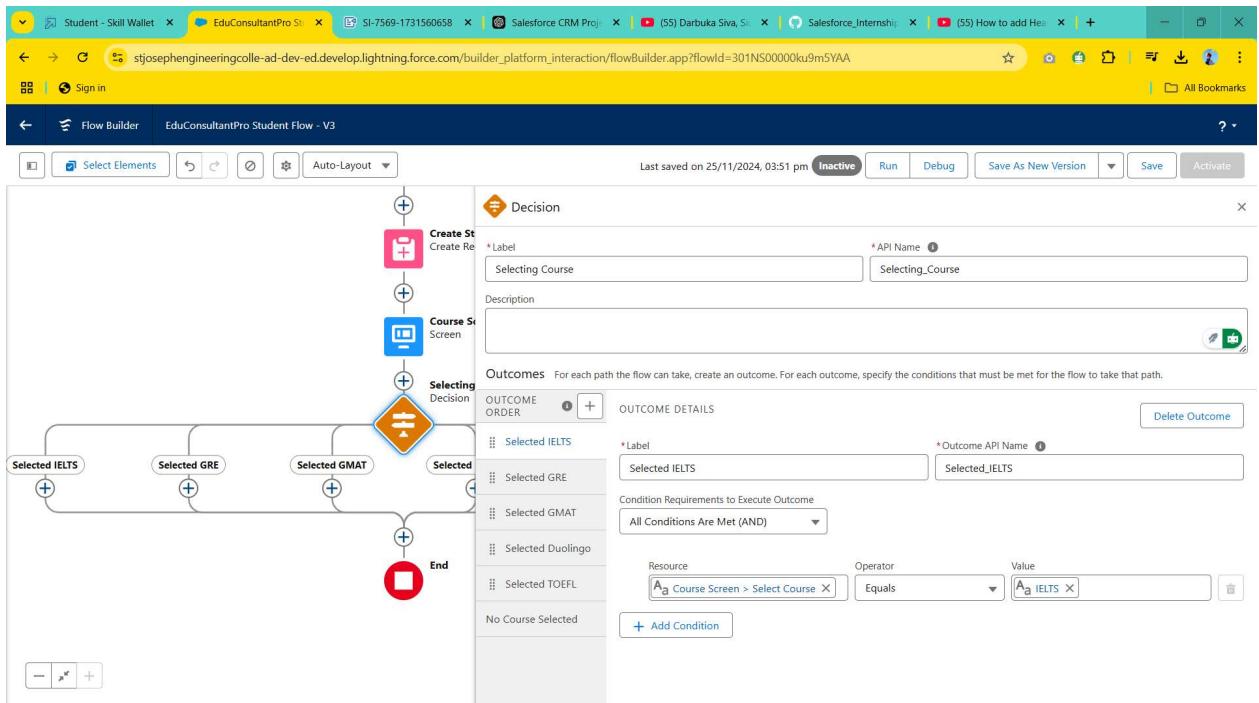
EduConsultantPro Student Flow

Select Course

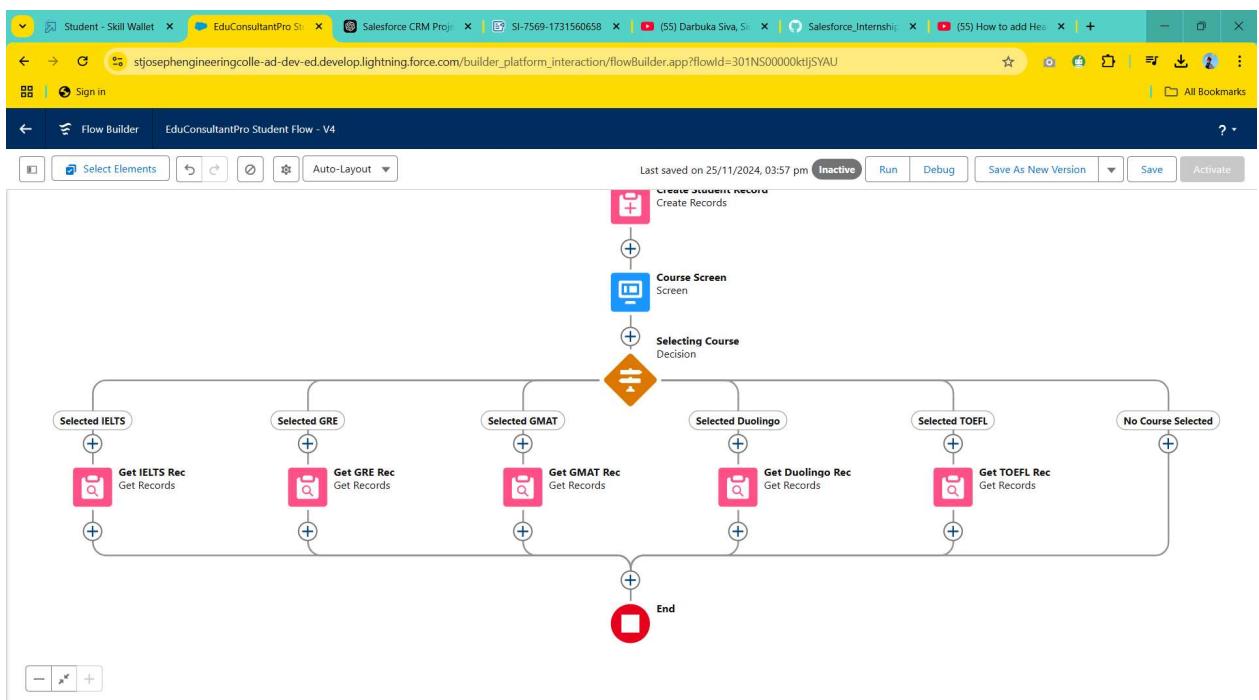
Pause Previous Finish

The "Components" tab in the sidebar is selected, showing various input types like Action Button, Add Attendees, Address, Call Script, Cancel Appointment, Checkbox, Checkbox Group, Choice Lookup, and Picklist. The "Picklist" component is currently selected. The "Fields" tab is also visible.

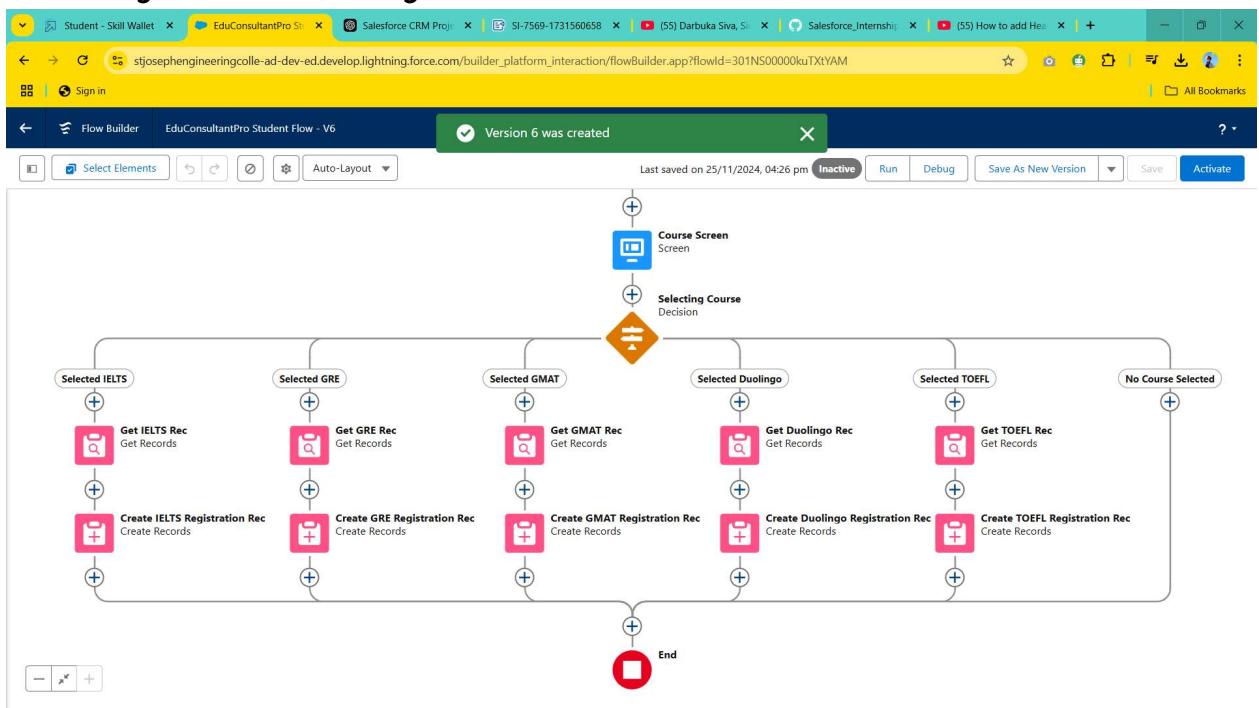
Add Decision Element



Add Get Record Element



Create Registration record using record element



Create Email Text Template Variables for email body and subject

The screenshot shows the "Edit Text Template" dialog box. The API Name is set to "StuRegistrationEmailTextTempBody". The Body contains the following 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.

The background of the dialog shows a portion of the student registration flow, specifically the "Selected TOEFL" path which triggers "Get TOEFL Rec Get Records" and "Create TOEFL Registration Rec Create Records".

Screenshot of the Salesforce Flow Builder interface showing the "Edit Text Template" dialog.

Edit Text Template

API Name: StuRegistrationEmailTextTempSub

Description: (empty)

Body:

```
Welcome to EduConsultantPro: Your registration is complete!
```

Toolbox: Course from Get TOEFL Rec, Screen Components (1), Text Templates (2), Variables (5), Create Records (6), Decisions (1).

Elements: Create Duolingo Registration Rec, Create GMAT Registration Rec, Create GRE Registration Rec, Create IELTS Registration Rec, Create Student Record, Create TOEFL Registration Rec.

Flow Details: The flow starts with "Get TOEFL Rec" (Get Records) leading to "Create TOEFL Registration Rec" (Create Records). This leads to an "End" node. A parallel path "No Course Selected" also leads to the "End" node.

Add an Action Element

Screenshot of the Salesforce Flow Builder interface showing the addition of an action element.

Toolbox: Course from Get TOEFL Rec, Screen Components (1), Text Templates (2), Variables (5), Actions (1), Create Records (6), Decisions (1).

Elements: Send Email to Student, Create GMAT Registration Rec, Create GRE Registration Rec, Create IELTS Registration Rec, Create Student Record, Create TOEFL Registration Rec.

Flow Details: The flow starts with three parallel "Get" actions: "Get GMAT Rec", "Get Duolingo Rec", and "Get TOEFL Rec", each followed by a "Create" action ("Create GMAT Registration Rec", "Create Duolingo Registration Rec", "Create TOEFL Registration Rec"). These three parallel steps converge into a single "Send Email to Student" action (Action Element). This leads to an "End" node.

Send Email Action Configuration:

- Body:** StuRegistrationEmailTextTempSub
- CC Recipient Address List:** Not included
- Email Template ID:** Not included
- Log Email on Send:** Not included
- Recipient Address Collection:** Not included
- Recipient Address List:** StudentRecordRes > Email
- Recipient ID:** Not included
- Related Record ID:** Not included
- Rich-Text-Formatted Body:** Not included
- Sender Email Address:** Not included
- Sender Type:** Not included
- Subject:** StuRegistrationEmailTextTempSub

Add Success screen element

The screenshot shows the 'Edit Screen' for the 'EduConsultantPro Student Flow'. The main content area contains a success message template:

```

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.  

Your Registration details have been sent through mail kindly check it once.  

Thank you.

```

The 'Screen Properties' panel on the right shows the following settings:

- Label:** Success Screen
- API Name:** Success_Screen
- Description:** (empty)

Activated the flow

The screenshot shows the activated flow diagram for 'EduConsultantPro Student Flow'. The flow consists of the following steps:

```

graph TD
    A[Get Records] --> B[Create GRE Registration Rec]
    A[Get Records] --> C[Create GMAT Registration Rec]
    A[Get Records] --> D[Create Duolingo Registration Rec]
    A[Get Records] --> E[Create TOEFL Registration Rec]
    B --> F[Send Email to Student]
    C --> F
    D --> F
    E --> F
    F --> G[Success Screen]
    G --> H[End]

```

The flow is currently active, as indicated by the green 'Active' button in the top bar.

Create Users

User named Consultant:

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A new user record is being created with the following details:

- Name:** new Consultant
- Email:** kscd214@gmail.com (Verified)
- Username:** consultant1126@gmail.com
- Nickname:** newly
- Title:** Manager
- Department:** Delegated Approver
- Division:** English (India)
- Address:** (Not explicitly listed but implied by the location settings)
- Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale:** English (India)
- Language:** English
- Manager:** new Consultant
- Delegated Approver:** new Consultant
- Receive Approval Request Emails:** Only if I am an approver
- Federation ID:** (Not explicitly listed but implied by the location settings)
- App Registration: One-Time Password:** (Not explicitly listed but implied by the location settings)

The 'Role' section indicates the user is assigned to the 'Salesforce Platform' profile and is a 'Standard Platform User'. The 'Active' checkbox is checked. Other user type checkboxes like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, and Load Lightning Pages While Scrolling are all unchecked.

Configuring user Approval setting :

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The configuration for the 'new Consultant' user includes the following settings:

- Address Fields:** Street, City, Zip/Postal Code, State/Province, Country (set to IN).
- Single Sign On Information:** Federation ID (empty).
- Locale Settings:** Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata), Locale: English (India), Language: English.
- Approver Settings:** Delegated Approver: new Consultant, Manager: new Consultant, Receive Approval Request Emails: Only if I am an approver.

At the bottom of the page, there are three buttons: Save, Save & New, and Cancel.

Create an Approval Process for Property Object

Create an Email Template:

The screenshot shows the Salesforce Email Templates page. The left sidebar lists categories: Recent, Created by Me, Private Email Templates, Public Email Templates, All Email Templates, Folders, All Folders, Created by Me, and Shared with Me. The main area displays a table of email templates with columns: Email Template Name, Description, Folder, Last Modified By, and Last Modified Date. Three templates are listed: Rejection Template, Approval Template, and Submission Template, all created by EduConsultPro and last modified on 26/11/2024.

Email Template Name	Description	Folder	Last Modified By	Last Modified Date
Rejection Template		EduConsultPro	Chethan KS	26/11/2024, 3:25 pm
Approval Template		EduConsultPro	Chethan KS	26/11/2024, 3:24 pm
Submission Template		EduConsultPro	Chethan KS	26/11/2024, 3:22 pm

The screenshot shows the Approval Template edit screen. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, Registrations, and more. The main area has tabs for Details and Related. Under Details, there are sections for Information (Email Template Name: Approval Template, Description: , Related Entity Type: Appointment, Folder: EduConsultPro) and Message Content. The Message Content section contains the following text:

I am pleased to inform you that your request has been approved. The details of your upcoming appointment are as follows:

Appointment Details:
Appointment No : {{!Appointment__c.Name}}
Student Name : {{!Appointment__c.Student_Name__c}}
Consultant Name : {{!Appointment__c.Consultant__c}}
Date & Time : {{!Appointment__c.Appointment_DateTime__c}}
Purpose : {{!Appointment__c.PurposeTopic__c}}

We look forward to discussing the requested topics and addressing any questions you may have during the appointment.

Thank you for your cooperation, and we look forward to meeting with you soon.

Best regards,
{{!Recipient_Name}},
EduConsultPro

Congratulations, Chaitanya! | Trailhead | The fun way to learn | Student - Skill Wallet | SI-7569-1731560658 | Rejection Template | Salesforce CRM Pro | Appointment | Sales

stjosephengineeringcolleg14-dev-ed.lightning.force.com/lightning//EmailTemplate/00XNS0000039xmP2AQ/view?queryScope=userFolders

Rejection Template

Details Related

Information

Email Template Name Rejection Template	Related Entity Type Appointment
Description	Folder EduConsultPro
Mode In Email Template Builder	<input type="checkbox"/>

Message Content

Subject: EduConsultPro has rejected your consultant
Enhanced Letterhead

HTML Value:

Dear {{Appointment__c.Student_Name__c}},

I regret to inform you that your request has been rejected at this time. We understand this may be disappointing, but we assure you that we are available to assist you with alternative solutions.

Here are the details of the request:

Appointment Details:
Appointment No : {{Appointment__c.Name}},
Student Name : {{Appointment__c.Student_Name__c}},
Consultant Name : {{Appointment__c.Consultant__c}},
Date & Time : {{Appointment__c.Appointment_DateTime__c}},
Purpose : {{Appointment__c.PurposeTopic__c}}

If you have any questions or would like to discuss further, please feel free to reach out to us.

Best regards,
{{Recipient.Name}},
EduConsultPro

Congratulations, Chaitanya! | Trailhead | The fun way to learn | Student - Skill Wallet | SI-7569-1731560658 | Submission Template | Salesforce CRM Pro | Appointment | Sales

stjosephengineeringcolleg14-dev-ed.lightning.force.com/lightning//EmailTemplate/00XNS0000039zQ2AQ/view?queryScope=userFolders

Submission Template

Information

Email Template Name Submission Template	Related Entity Type Appointment
Description	Folder EduConsultPro
Mode In Email Template Builder	<input type="checkbox"/>

Message Content

Subject: Appointment request with EduConsultPro
Enhanced Letterhead

HTML Value:

Dear {{Appointment__c.Student_Name__c}},

I hope this small finds you well. I am writing to confirm the details of our upcoming appointment scheduled for {{Appointment__c.Appointment_DateTime__c}} regarding {{Appointment__c.PurposeTopic__c}}.

Appointment Details:
Appointment No : {{Appointment__c.Name}},
Student Name : {{Appointment__c.Student_Name__c}},
Consultant Name : {{Appointment__c.Consultant__c}},
Date & Time : {{Appointment__c.Appointment_DateTime__c}},
Purpose : {{Appointment__c.PurposeTopic__c}}

I want to assure you that I am looking forward to our meeting and am fully prepared to address any questions or concerns you may have regarding {{Appointment__c.PurposeTopic__c}}. Your success and satisfaction are my top priorities, and I am committed to providing you with the guidance and support you need.

If you have any specific topics or questions you would like to discuss during our appointment, please feel free to share them with me in advance. This will help ensure that our time together is as productive and beneficial as possible.

If for any reason you need to reschedule or cancel our appointment, please notify me at your earliest convenience so that we can make alternative arrangements.

Once again, thank you for choosing to work with me on this matter. I am confident that our collaboration will lead to positive outcomes and progress toward your goals.

If you have any questions or require further information before our scheduled appointment, please don't hesitate to reach out to me.

Looking forward to our meeting.

Best regards,
{{Recipient.Name}},

Create an approval process:

The screenshot shows the Salesforce Setup interface with the following details:

Approval Processes page for "Appointment Approval".

Process Definition Detail section:

- Process Name: Appointment Approval
- Unique Name: Appointment_Approval
- Description:
- Entry Criteria:
- Record Editability: Administrator OR Current Approver
- Approval Assignment Email Template: Initial Submitters
- Initial Submitters: Appointment Owner
- Created By: Chethan KS 26/11/2024, 3:33 pm
- Active:
- Next Automated Approver Determined By: Manager of Record Submitter
- Allow Submitters to Recall Approval Requests:
- Modified By: Chethan KS 26/11/2024, 3:49 pm

Initial Submission Actions section:

Action	Type	Description
Edit Remove	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Submitted
Edit Remove	Email Alert	Submission Email Alert

Approval Steps section:

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions	Edit Del	1	Step 1		Manager	Final Rejection

Final Approval Actions section:

Action	Type	Description
Edit Remove	Record Lock	Lock the record from being edited
Edit Remove	Email Alert	Submission approved Email Alert
Edit Remove	Field Update	Final approved

Final Rejection Actions section:

Action	Type	Description
Edit Remove	Record Lock	Unlock the record for editing
Edit Remove	Field Update	Rejected
Edit Remove	Email Alert	Rejected Email Alert

Create a Record Triggered Flow

Configure the Start Element

The screenshot shows the Salesforce Flow Builder interface. On the left, a flow diagram is displayed with a green start element at the top, followed by a blue action element, and a red end element at the bottom. A plus sign (+) icon is positioned between the action and end elements. On the right, a configuration pane titled "Configure Start" is open. It shows the object as "Appointment" and the trigger as "A record is created". Under "Configure Trigger", the option "A record is created" is selected. In the "Set Entry Conditions" section, there is a note about minimizing unnecessary flow executions. The "Condition Requirements" dropdown is set to "None". In the "Optimize the Flow for:" section, "Fast Field Updates" is selected, and "Actions and Related Records" is checked. There is also an unchecked checkbox for "Include a Run Asynchronously path".

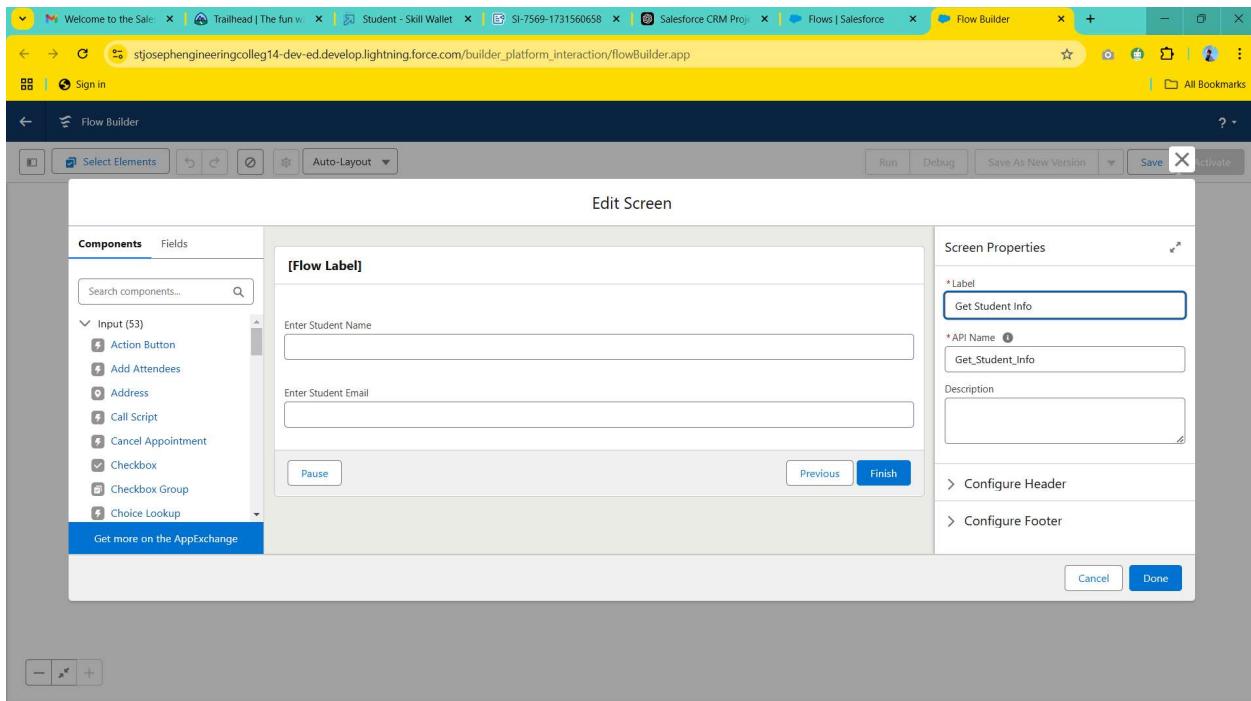
Add an Action Element

The screenshot shows the Salesforce Flow Builder interface. The flow diagram now includes a green "Run Immediately" element between the start and action elements. The action element is a blue lightning bolt icon labeled "Approval SubFlow Action". On the right, a configuration pane titled "Submit for Approval" is open. It shows the subflow name as "Approval_SubFlow". The "Description" field is empty. Below it is a "Submit for Approval" core action with the label "submit-submit". A note states: "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." Under "Set Input Values for the Selected Action", there is a table with three rows:

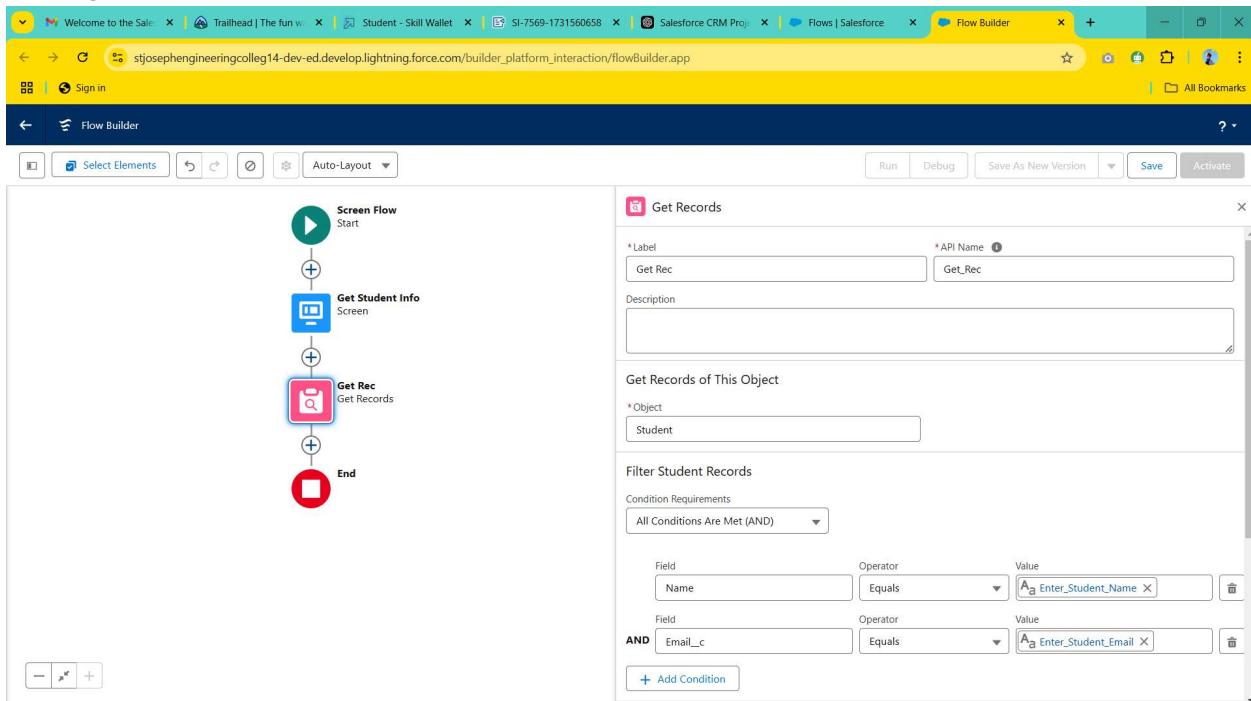
Action	Value	Setting
A ₃ * Record ID	A ₃ Triggering Appointment_c > Record ID X	Not Included
A ₃ Approval Process Name Or ID		Not Included
A ₃ Next Approver IDs		Not Included
O ₃ Skip Entry Criteria		Not Included

Create a ScreenFlow for Existing Student to Book an Appointment

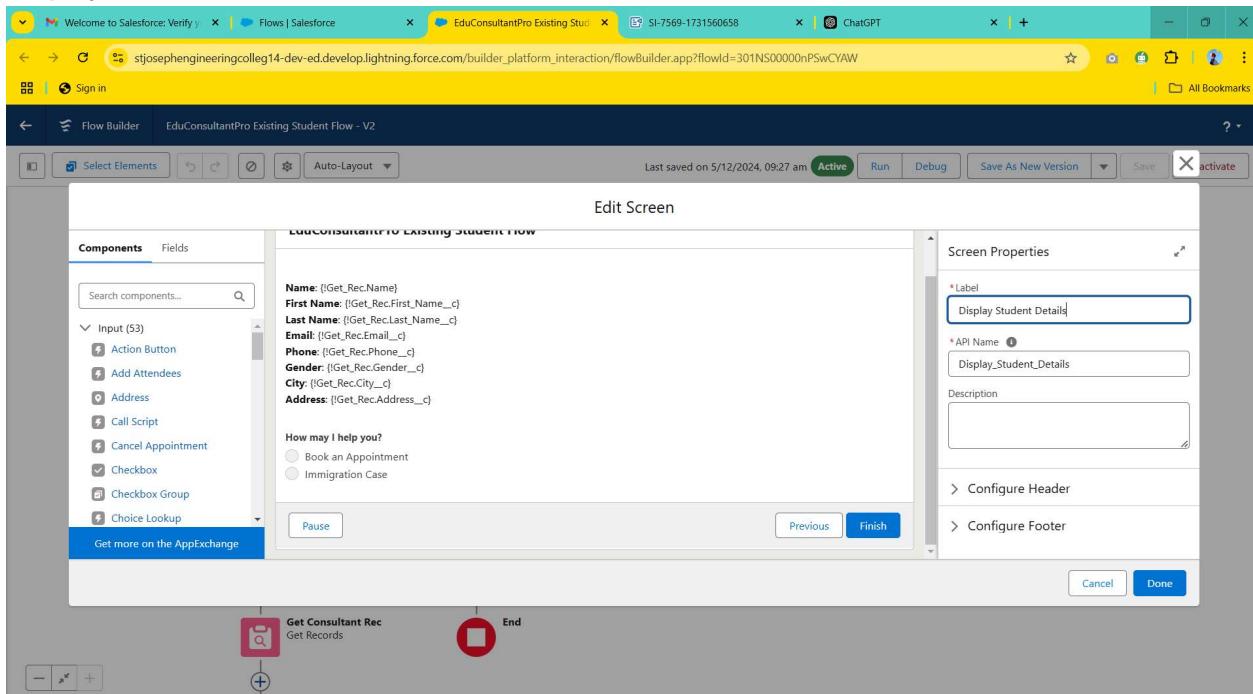
Add screen element



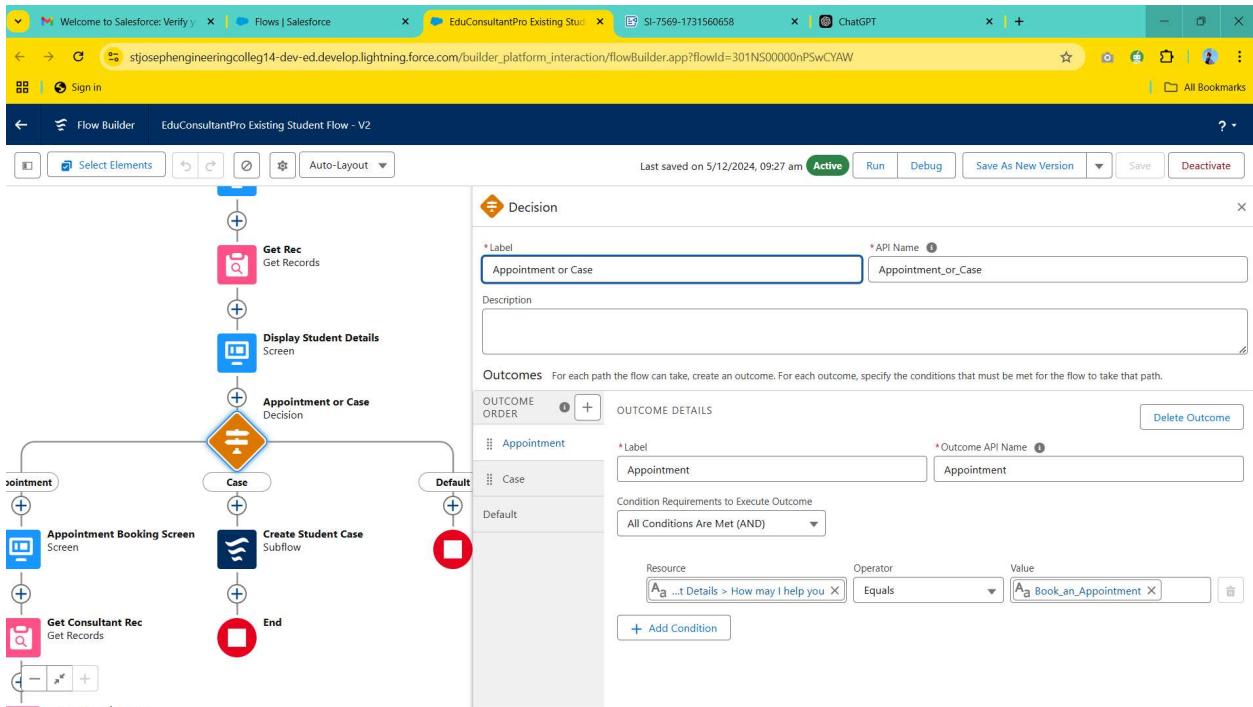
add a get record element



Display Student details



Add decision element



For each path, the next step can be: Create an outcome, or: Each outcome, specify the conditions that must be met for the next to take this path.

OUTCOME ORDER	OUTCOME DETAILS	
Appointment	* Label: Case	* Outcome API Name: Case
Case		
Default	Condition Requirements to Execute Outcome All Conditions Are Met (AND)	
	Resource: A_a ...t Details > How may I help you Operator: Equals Value: A_a Immigration_Case	Delete Outcome
	+ Add Condition	

Appointment Book Screen

Welcome to Salesforce: Verify... Flows | Salesforce EduConsultantPro Existing Student Flow - V2

stjosephengineeringcollege14-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301NS00000nPSwCYAW

Sign in

Last saved on 5/12/2024, 09:27 am Active Run Debug Save As New Version Save activate

Components Fields

Search components...

EduConsultantPro Existing Student Flow

Appointment Date/Time

Date Time

Purpose/Topic

Notes

Screen Properties

*Label: Appointment Booking Screen

*API Name: Appointment_Booking_Screen

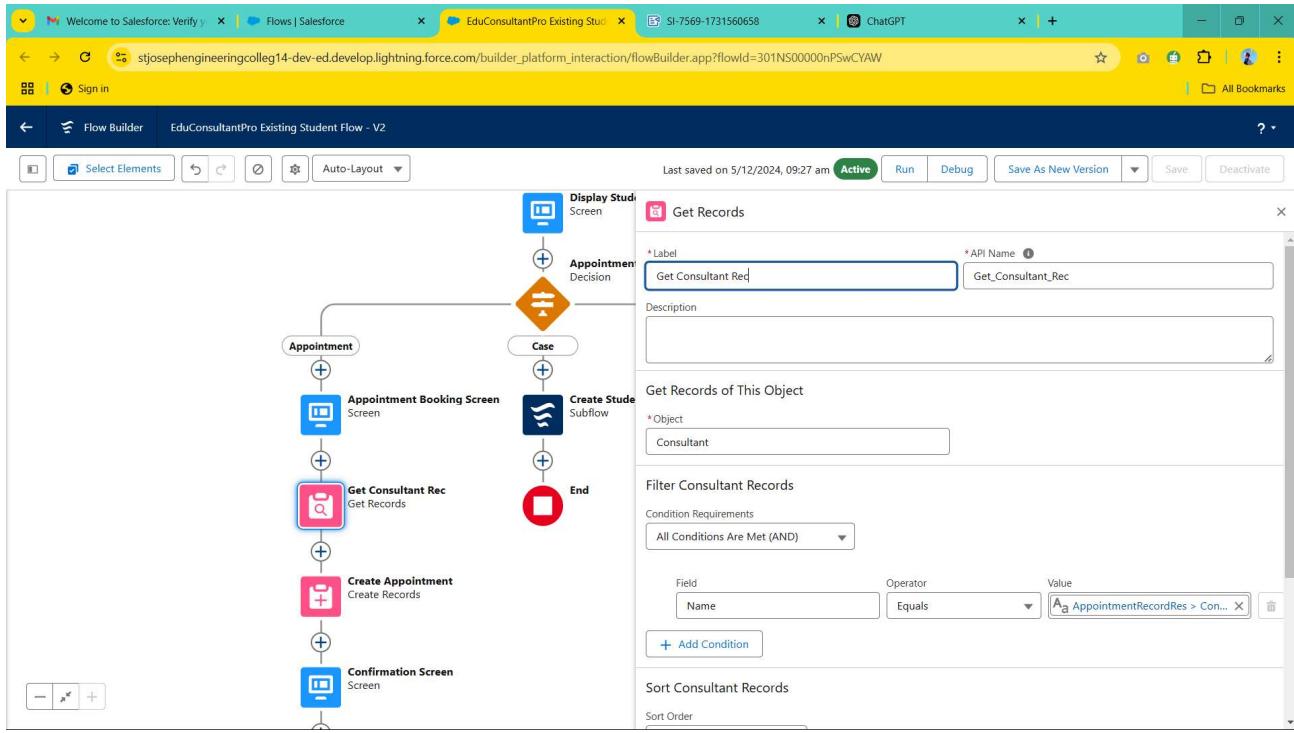
Description

> Configure Header

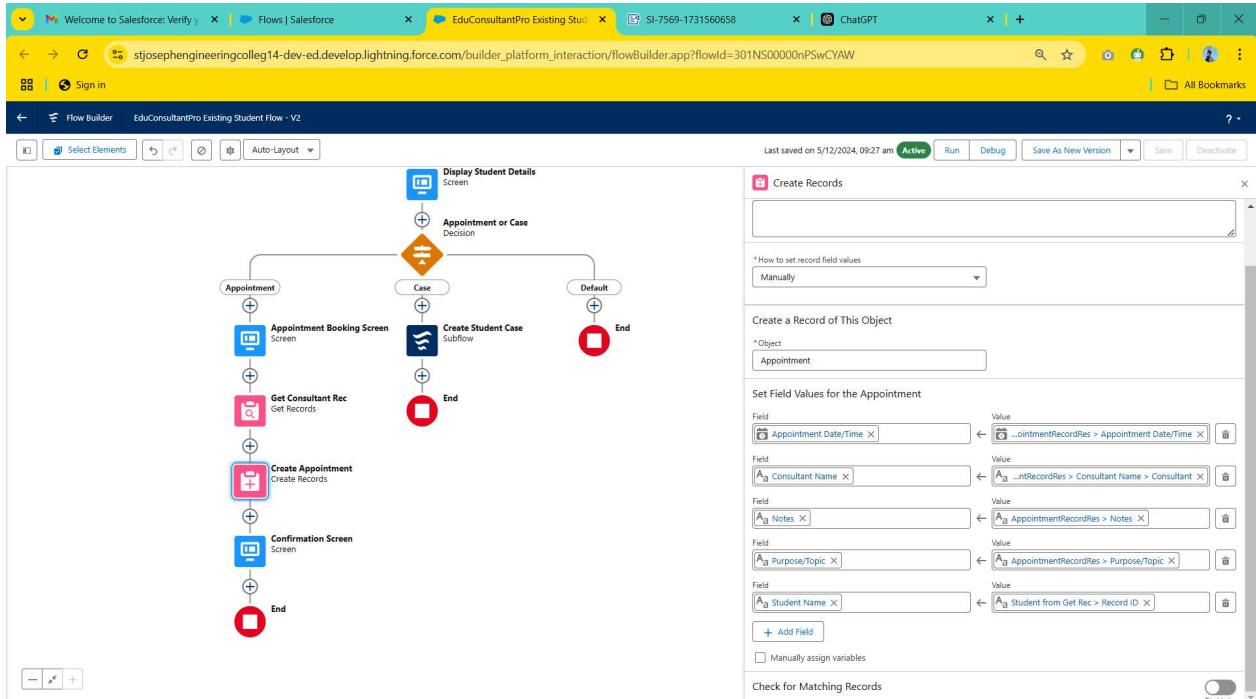
> Configure Footer

Cancel Done

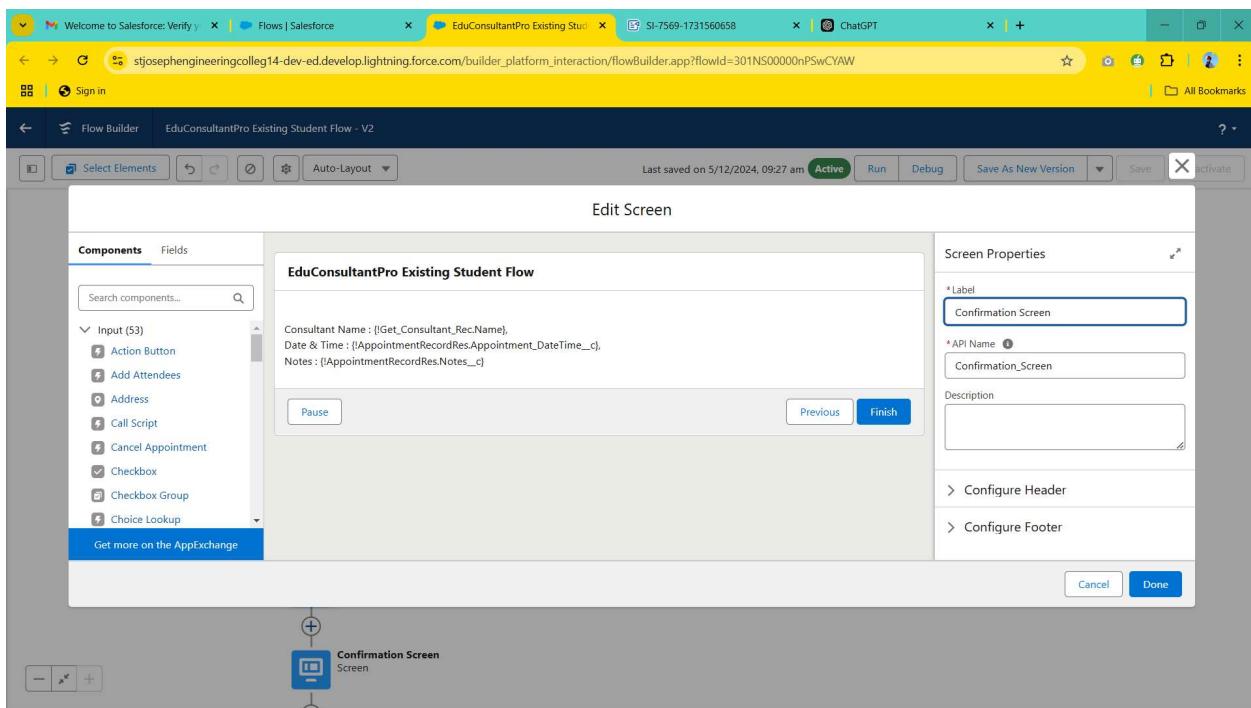
Get Records



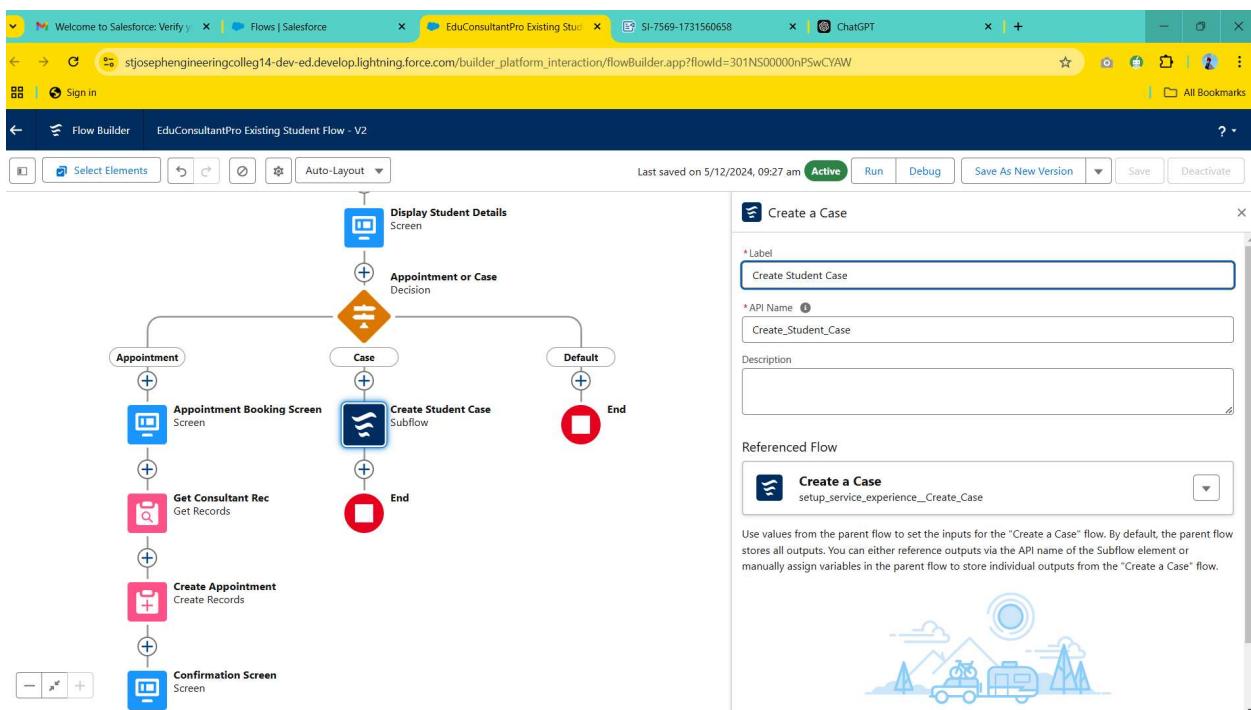
Create Appointment



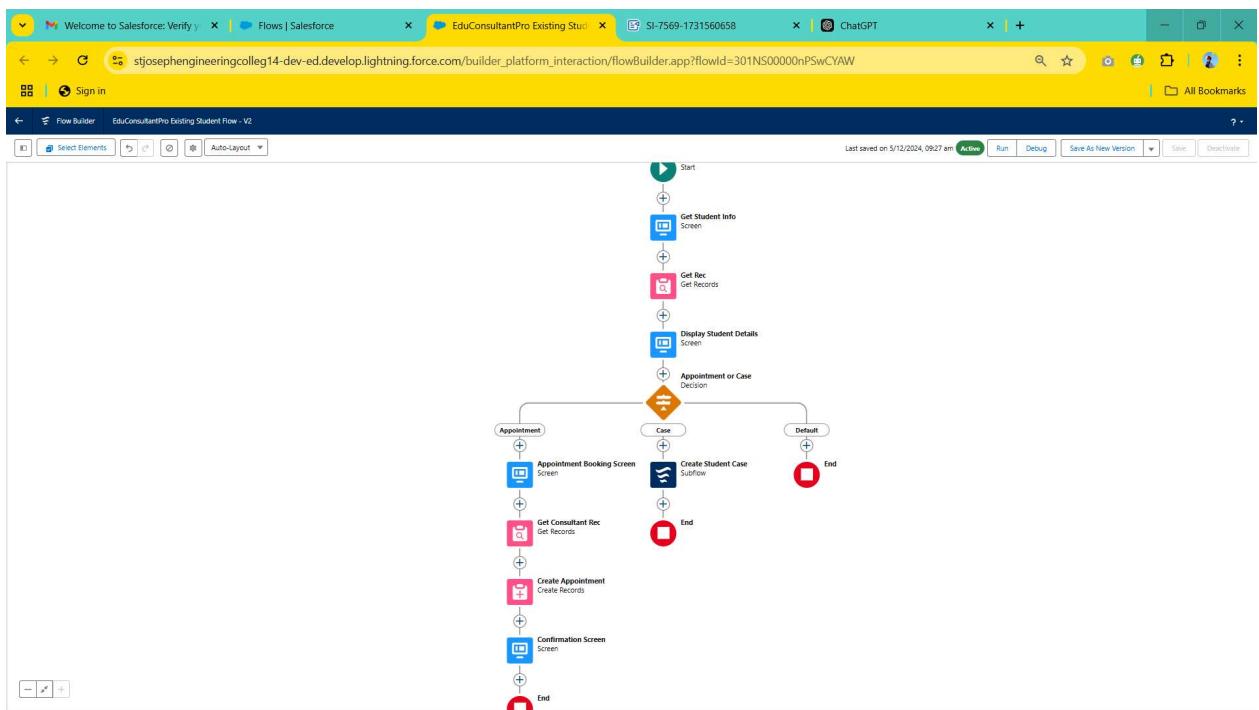
Confirmation Screen



Create a subflow

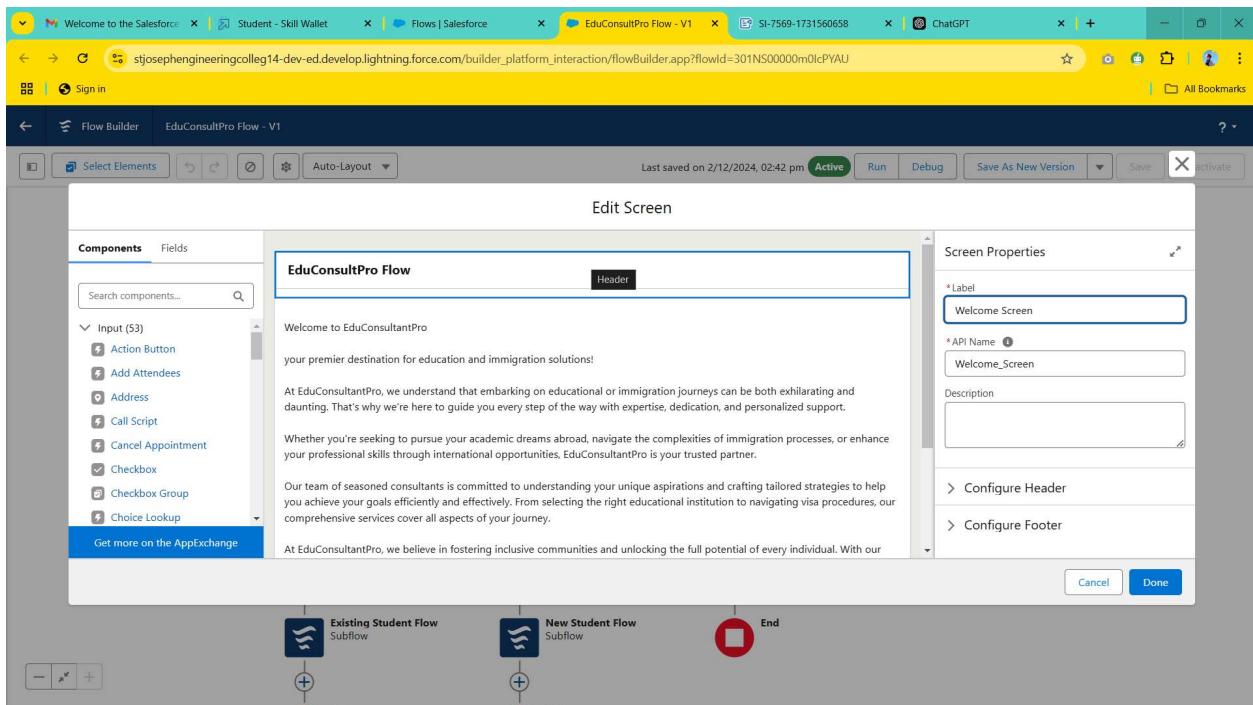


Entire Flow

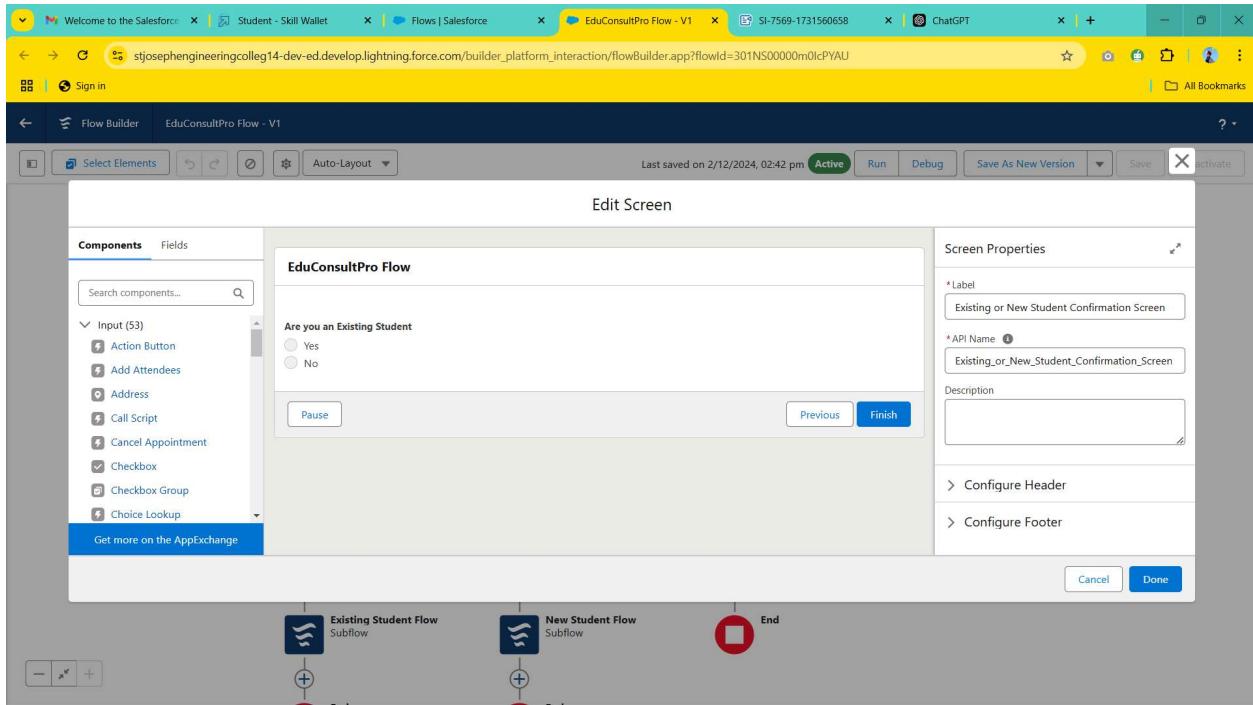


Create a ScreenFlow to Combine all the flows at one place

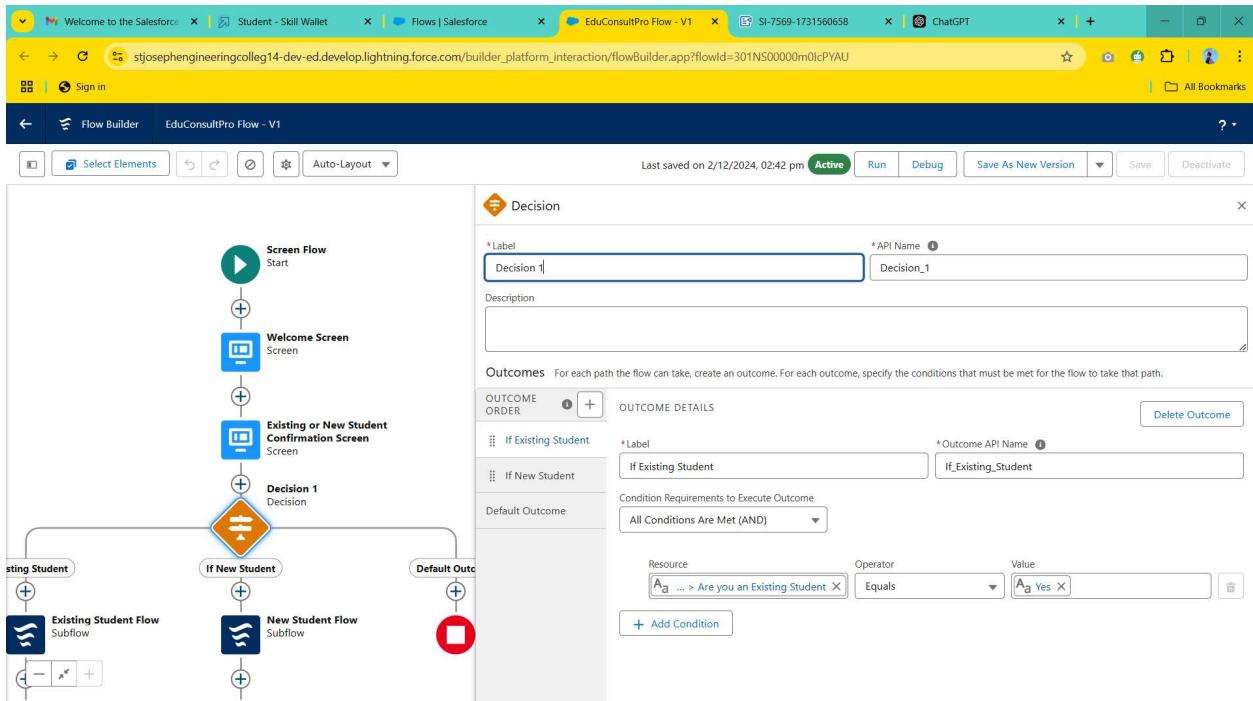
Add a Welcome screen element



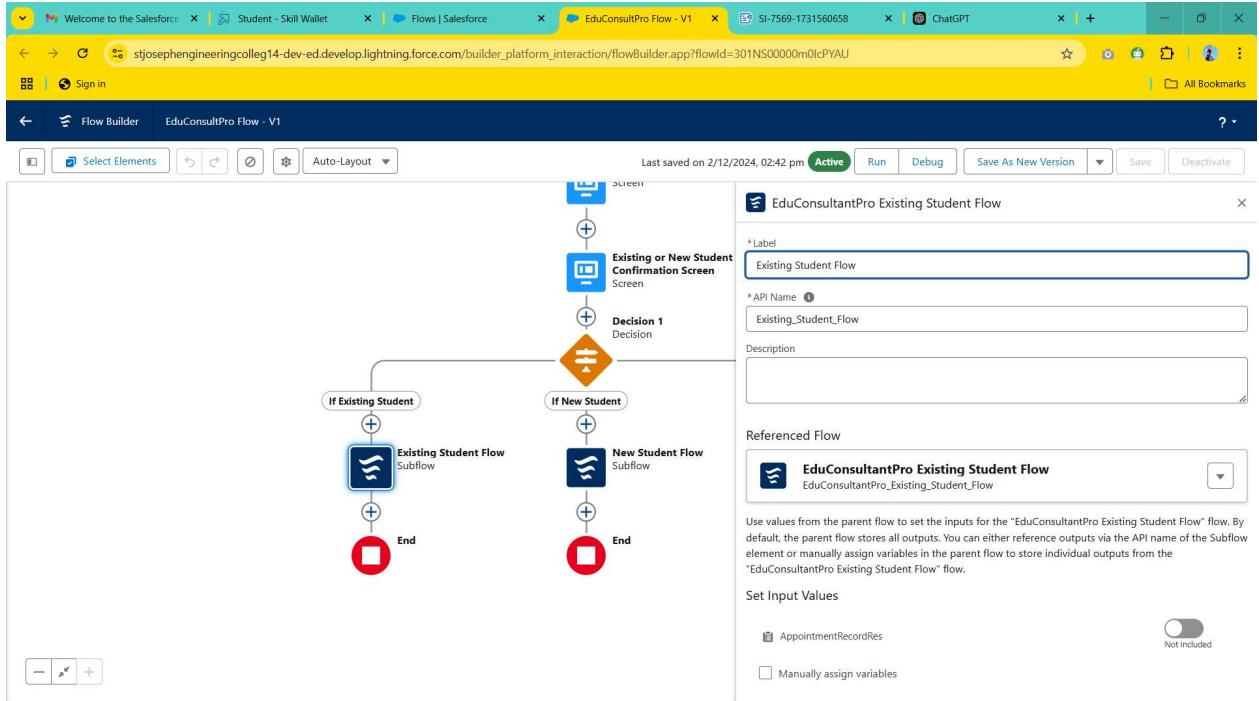
Add a screen element to ask whether he is new student or old student



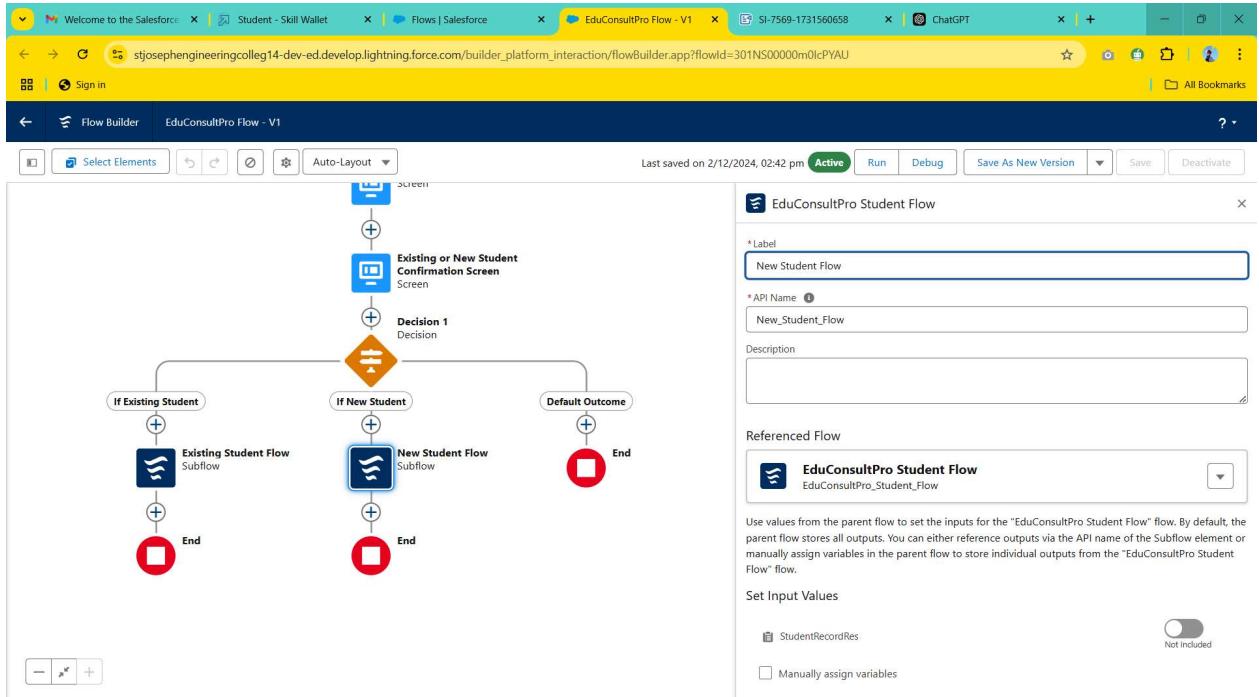
Add decision element

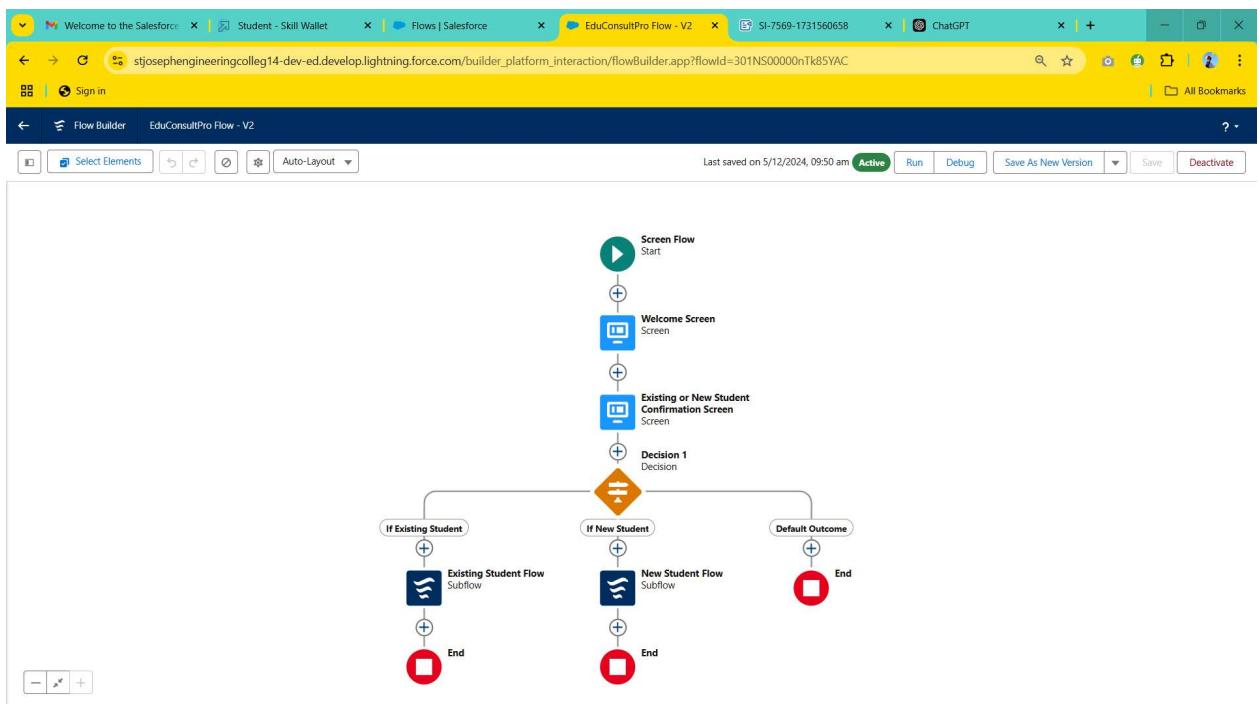


Add a subflow if it is a existing student

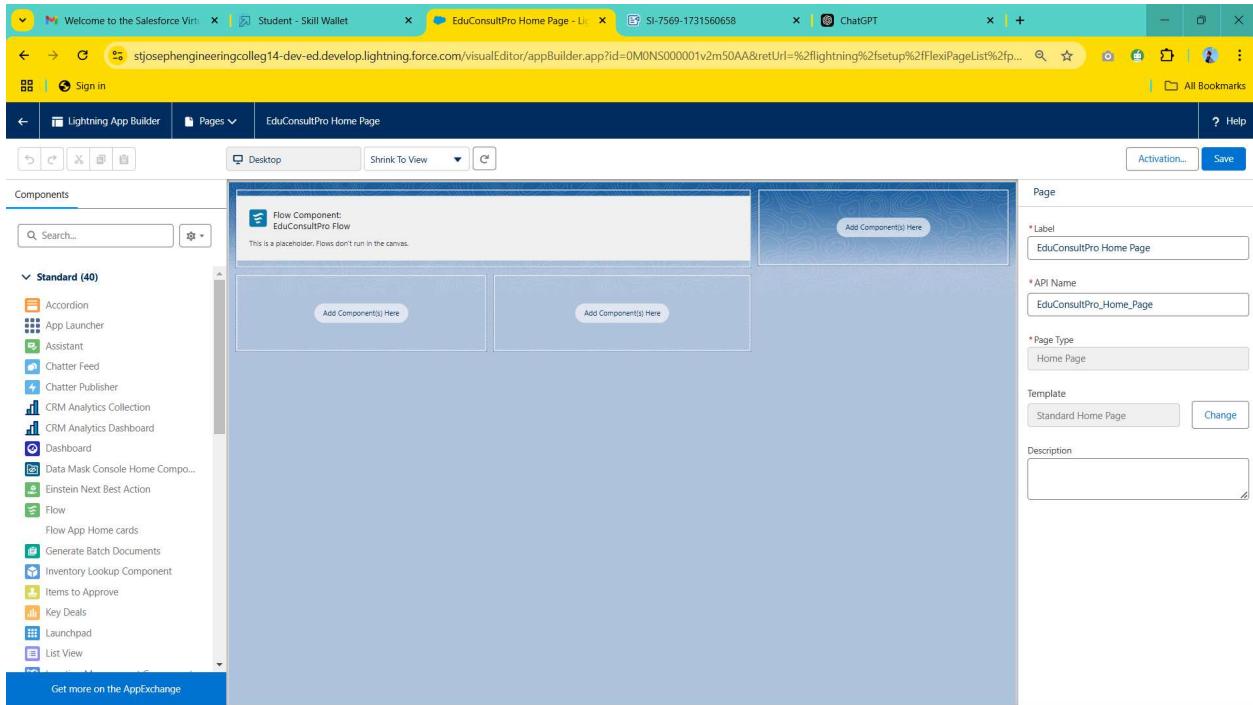


Add a subflow if it is new student





Create a lightning app page



5. Testing and Validation

1. User Interface Testing

- Objective: Validate the functionality and usability of the Salesforce interface for end-users.
- Approach:
 - Tested the EduConsultPro app on desktop and mobile platforms to ensure responsive design.
 - Validated navigation links, object record pages, and data entry forms for completeness and accuracy.
 - Conducted manual testing of all flows using the Run and Debug options:
 - Checked whether inputs were correctly captured.
 - Ensured expected outcomes, such as student registration, email notifications, and course registration, were achieved.

2. Flow Testing

- Tested individual flows for correct data handling and automation:
 - EduConsultPro Flow: Verified proper redirection for new and existing students.
 - EduConsultPro Student Flow: Ensured correct student creation, course registration, and email notifications.
 - EduConsultantPro Existing Student Flow: Checked data retrieval for existing students and appointment or case creation.

3. End-to-End Testing

- Objective: Ensure all components integrate seamlessly.
- Approach:
 - Verified workflows, including student registration, course enrollment, and appointment scheduling, from start to finish.
 - Confirmed lookup relationships between objects functioned as expected.

4. Validation Results

- Ensured all flows were free of errors and met project requirements.
- Verified data accuracy and record integrity for objects and relationships.
- Conducted user acceptance testing (UAT) to confirm the solution met user expectations.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

1. New Student Registration and Course Enrollment

- Scenario: A prospective student needs to register for a course.
- Solution:
 - A **screen flow** guides the user through entering student details, selecting a course, and automatically registering the student.
 - Sends a confirmation email to the student upon successful registration.

2. Existing Student Consultation or Case Creation

- Scenario: An existing student requires an appointment with a consultant or needs to raise a case related to immigration or visa issues.

- Solution:
 - A **screen flow** fetches the student's details using their name and email.
 - Offers options to schedule an appointment or create a case linked to the student's record.

3. Consultant Management and Appointments

- Scenario: Consultants manage their appointments and interact with assigned students.
- Solution:
 - Lookup relationships between **Appointments** and **Consultants** ensure proper tracking of each consultation session.
 - Consultants can view their appointments via the **EduConsultPro** app.

4. Streamlining Student Queries

- Scenario: Students inquire about services or face challenges related to immigration or visa processing.
- Solution:
 - Cases are created for each query, linked to the student's record, and tracked for resolution.

5. Centralized Data Management

- Scenario: EduConsultPro Institute needs a single source of truth for all student and consultant-related data.
- Solution:
 - Salesforce's custom objects and relationships ensure all data is stored, connected, and accessible within the **EduConsultPro** app.

6. Automated Communication

- Scenario: Students need timely notifications about their registration, appointments, or cases.
- Solution:
 - Email notifications are automated within flows to keep students informed.

7. Cross-Platform Accessibility

- Scenario: Staff and consultants require access to the system on both desktop and mobile devices.
- Solution:
 - The **EduConsultPro** app is designed for both desktop and mobile form factors using Salesforce Lightning App Builder.

7.CONCLUSION:

The EduConsultPro Home Page is a dynamic and efficient solution that centralizes and streamlines the processes essential to educational consultancy and immigration services. By combining intuitive navigation, automated workflows, and seamless integration of tools like Flows, Appointment Management, and Approval Processes, it ensures that both administrators and consultants can operate with maximum productivity and precision.

With its user-friendly interface and powerful features, the EduConsultPro Home Page empowers users to manage student records, consultant activities, and appointment workflows effortlessly. This not only saves time but also enhances the overall experience for all stakeholders, ensuring that every student receives personalized and timely support on their journey.

At EduConsultPro, we are committed to providing innovative solutions that simplify complex processes while maintaining quality and accuracy. The Home Page serves as the gateway to success, helping users achieve their goals and aspirations efficiently.