

A CRM Application to Manage the Services offered by an Institution

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 Setup interface with the following details:

- Tab:** Object Manager
- Object:** Course
- Section:** Fields & Relationships
- Table Headers:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED
- Table Data:**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course Name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		
Description	Description_c	Long Text Area(131072)		
End Date	End_Date_c	Date		
Instructor	Instructor_c	Text(255)		
Last Modified By	LastModifiedBy	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 following details:

- Setup Path:** SETUP > OBJECT MANAGER > Consultant
- Section:** Fields & Relationships
- Table Headers:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED
- Table Data:** 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)

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

- Setup Path:** SETUP > OBJECT MANAGER > Student
- Section:** Fields & Relationships
- Table Headers:** Field Label, API Name, Type
- Table Data:**

Field Label	API Name	Type
Created By	CreatedById	Lookup(User)
Date of Birth	Date_of_Birth_c	Date
Email	Email_c	Email
First Name	First_Name_c	Text(255)
Gender	Gender_c	Text(255)
Last Modified By	LastModifiedById	Lookup(User)
Last Name	Last_Name_c	Text(255)
Owner	OwnerId	Lookup(User,Group)
Phone	Phone_c	Phone
Qualification	Qualification_c	Text(255)
Student	Name	Text(80)
Student Name	Student_Name_c	Text(255)
University Name	University_Name_c	Text(255)
Year of Passing	Year_of_Passing_c	Date

Appointment Object:

Fields:

Appointment Date/Time(Date/Time)

Appointment No(Number)

Notes(Long TextArea)

Purpose(Text)

Status(Picklist)

The screenshot shows the Salesforce Setup interface with the URL stjosephengineeringcollege-ad-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000001kzp//FieldsAndRelationships/view. The page title is "Student". The left sidebar shows navigation 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 is titled "Fields & Relationships" and lists 17 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

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 with the following details:

- Setup Header:** Student - Skill Wallet, SI-7569-1731560658, Registration | Salesforce, Salesforce CRM Project, (54) Atrangi Re: Rait Zara, Editing Salesforce_Internship.
- Page Title:** Registration
- Section:** Object Manager
- Table:** Fields & Relationships (7 items)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course Name	Course_Name__c	Lookup(Course)		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	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 the Salesforce Setup interface for the Case object. The left sidebar lists various configuration options under 'Fields & Relationships'. The main content area displays the 'Case Type Picklist Values' section, which contains a table with the following data:

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

The screenshot shows the Salesforce Setup interface for the Case object. The left sidebar lists various configuration options under 'Fields & Relationships'. The main content area displays the 'Case Status Picklist Values' section, which contains a table with the following data:

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 interface showing the "App Details & Branding" section.

App Settings

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name: EduConsultPro

*Developer Name: EduConsultPro

Description: Enter a description...

App Branding

Image: Primary Color Hex Value: #0070D2

Org Theme Options: Use the app's image and color instead of the org's custom theme

App Launcher Preview

EduConsultPro

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

App Settings

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Q: Type to filter list...

Create

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

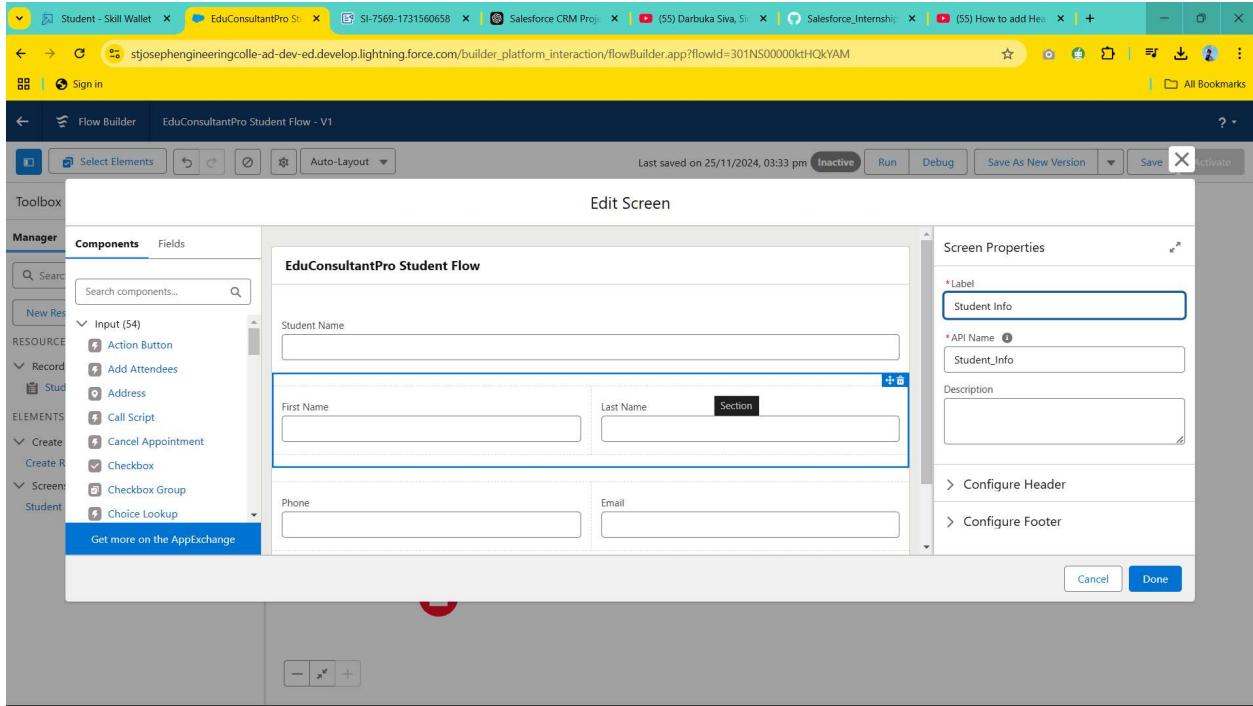
Selected Items

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

Up ▲ Down ▼

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 following details:

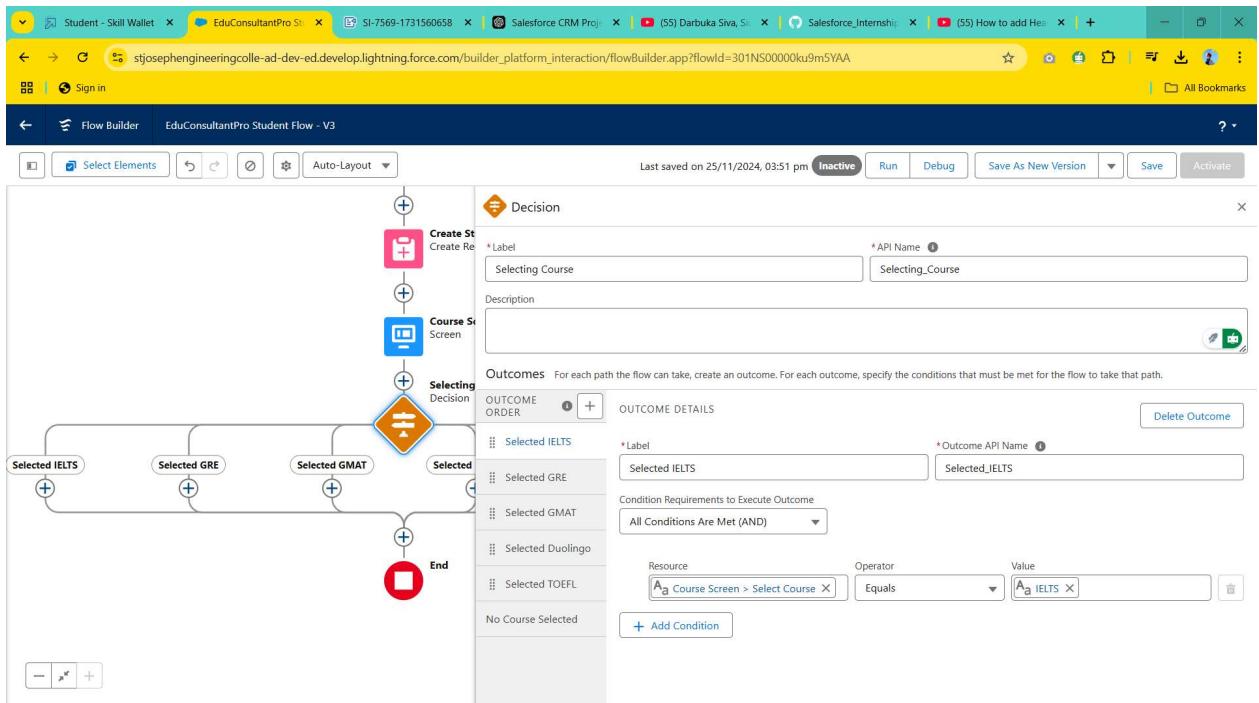
- Flow Name:** EduConsultantPro Student Flow - V2
- Status:** Inactive
- Last saved:** 25/11/2024, 03:43 pm
- Elements:**
 - Screen Flow Start
 - Student Info Screen
 - Create Student Record (Create Records)
 - End
- Create Records Configuration:**
 - Label:** Create Student Record
 - API Name:** Create_Student_Record
 - 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:

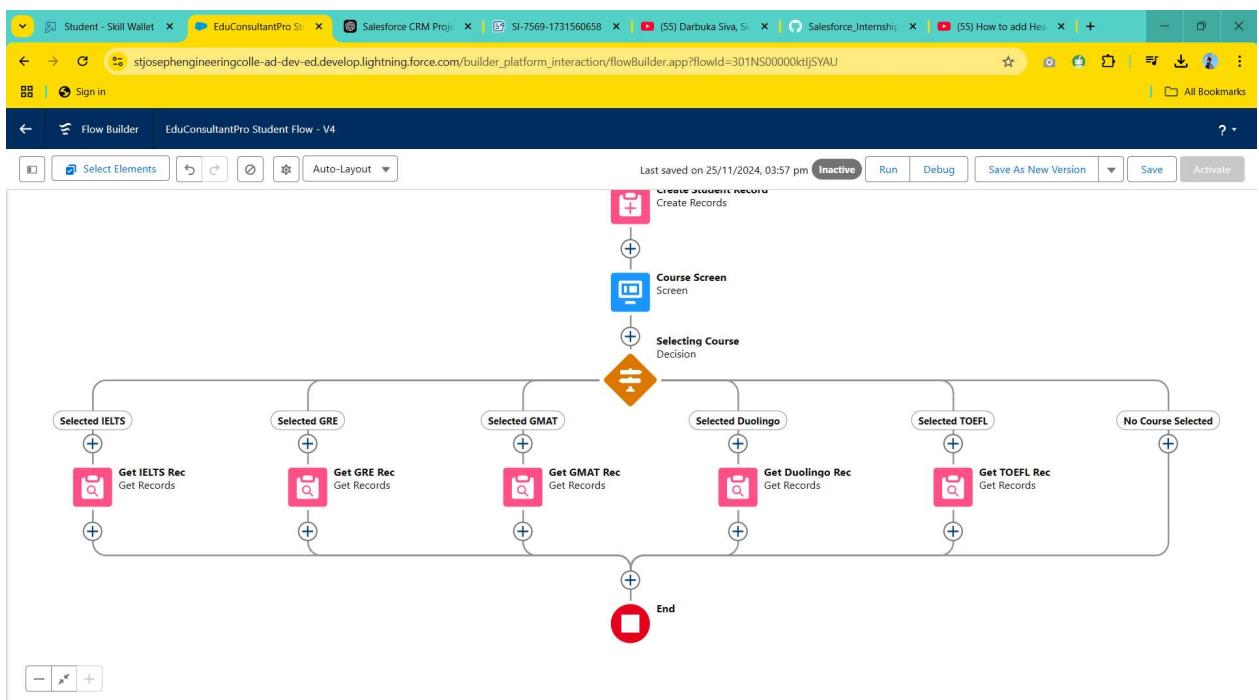
The screenshot shows the Salesforce Flow Builder interface with the following details:

- Flow Name:** EduConsultantPro Student Flow - V3
- Status:** Inactive
- Last saved:** 25/11/2024, 03:51 pm
- Toolbox Components:** Input (54), Action Button, Add Attendees, Address, Call Script, Cancel Appointment, Checkbox, Checkbox Group, Choice Lookup, Picklist, etc.
- Screen Element:** A screen titled "EduConsultantPro Student Flow" with a "Select Course" picklist component.
- Picklist Configuration:** A modal window titled "Edit Screen" showing a list of course options:
 - (IELTS)
 - (GRE)
 - (GMAT)
 - (Duolingo)
 - (TOEFL)- Buttons:** Previous, Finish, Cancel, Done

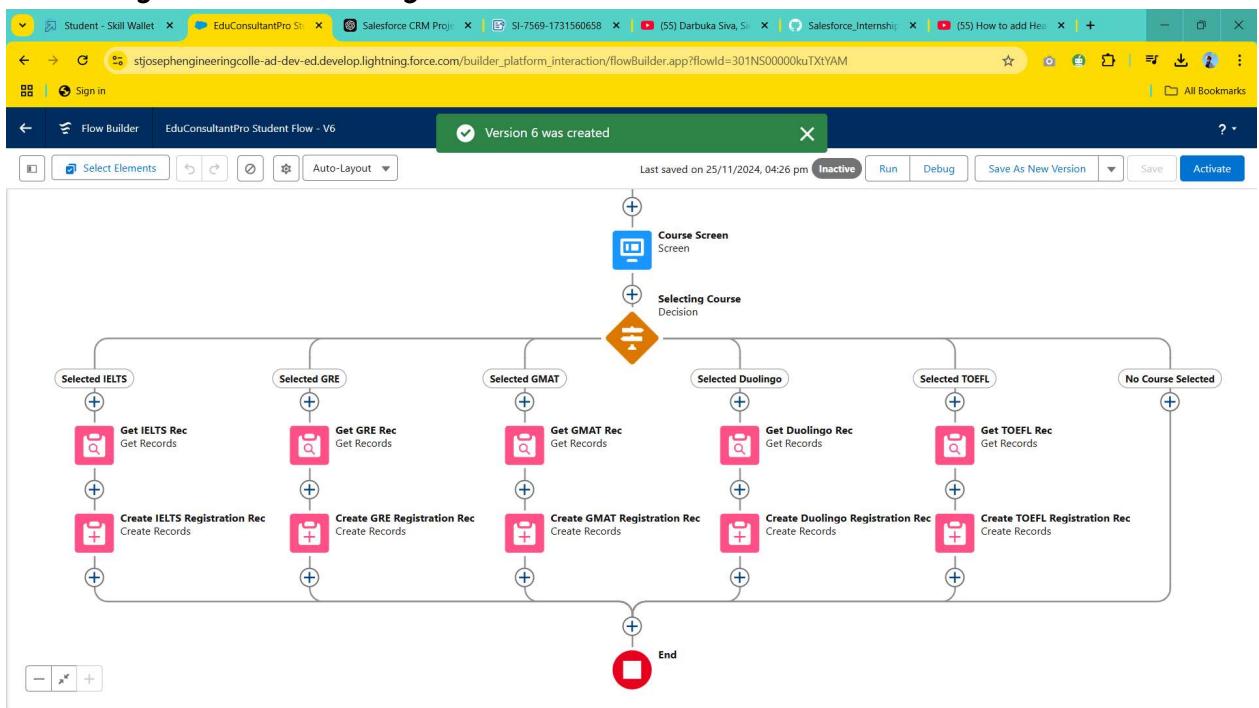
Add Decision Element



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 "Create TOEFL Registration Rec Create Records" step for the "TOEFL" course.

Student - Skill Wallet | SI-7569-1731560658 | EduConsultantPro St | Salesforce CRM Proj | (55) Darbuka Siva, Si | Salesforce_ Internship | (55) How to add He | + | - | X

stjosephengineeringcollege-ad-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301NS00000kuTxTYAM

Flow Builder EduConsultantPro Student Flow - V6

Last saved on 25/11/2024, 04:26 pm Inactive Run Debug Save As New Version Save Activate

Toolbox

- Course from Get TOEFL Rec
- Screen Components (1)
- A₃ Select Course
- Text Templates (2)
- A₃ StuRegistrationEmailTextTempBody
- A₃ StuRegistrationEmailTextTempSub
- Variables (5)
- A₃ RegistrationId from Create Duolingo...
- A₃ RegistrationId from Create GMAT R...
- A₃ RegistrationId from Create GRE Regi...
- A₃ RegistrationId from Create IELTS Re...
- A₃ RegistrationId from Create TOEFL R...

ELEMENTS

- Create Records (6)
- Create Duolingo Registration Rec
- Create GMAT Registration Rec
- Create GRE Registration Rec
- Create IELTS Registration Rec
- Create Student Record
- Create TOEFL Registration Rec
- Decisions (1)

Edit Text Template

* API Name: StuRegistrationEmailTextTempSub

Description:

* Body:

Insert a resource... View as Plain Text

Welcome to EduConsultantPro: Your registration is complete!

Cancel Done

Add an Action Element

Student - Skill Wallet | SI-7569-1731560658 | EduConsultantPro St | Salesforce CRM Proj | (55) Darbuka Siva, Si | Salesforce_ Internship | (55) How to add He | + | - | X

stjosephengineeringcollege-ad-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301NS00000kuTxTYAM

Flow Builder EduConsultantPro Student Flow - V6

Last saved on 25/11/2024, 04:26 pm Inactive Run Debug Save As New Version Save Activate

ToolBOX

- Course from Get TOEFL Rec
- Screen Components (1)
- A₃ Select Course
- Text Templates (2)
- A₃ StuRegistrationEmailTextTempBody
- A₃ StuRegistrationEmailTextTempSub
- Variables (5)
- A₃ RegistrationId from Create Duolingo...
- A₃ RegistrationId from Create GMAT R...
- A₃ RegistrationId from Create GRE Regi...
- A₃ RegistrationId from Create IELTS Re...
- A₃ RegistrationId from Create TOEFL R...

ELEMENTS

- Actions (1)
- Send Email to Student
- Create Records (6)
- Create Duolingo Registration Rec
- Create GMAT Registration Rec
- Create GRE Registration Rec
- Create IELTS Registration Rec
- Create Student Record
- Create TOEFL Registration Rec
- Decisions (1)
- Selecting Course
- Get Records (5)
- Get Duolingo Rec
- Get GMAT Rec
- Get GRE Rec
- Get IELTS Rec
- Get TOEFL Rec

Send Email to Student

Send Email

Body: StuRegistrationEmailTextTempBody

CC Recipient Address List

Email Template ID

Log Email on Send

Recipient Address Collection

Recipient Address List: StudentRecordRes > Email

Recipient ID

Related Record ID

Rich-Text-Formatted Body

Sender Email Address

Sender Type

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 'Components' section of the toolbox is open, showing various options like Input, Action Button, Add Attendees, Address, Call Script, Cancel Appointment, Checkbox, Checkbox Group, Choice Lookup, and Create records. A 'Success Screen' component is currently selected.

Activated the flow

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

- Four parallel 'Get Records' steps (Get TOEFL Rec, Get GRE Rec, Get GMAT Rec, Get Duolingo Rec).
- Four parallel 'Create Records' steps (Create GRE Registration Rec, Create GMAT Registration Rec, Create Duolingo Registration Rec, Create TOEFL Registration Rec).
- A central 'Send Email to Student' action.
- A 'Success Screen' step.
- An 'End' step.

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:** ksc6214@gmail.com (Verified)
- Username:** consultant1126@gmail.com
- Nickname:** newly
- Title:** Manager
- Department:** Delegated Approver
- Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale:** English (India)
- Language:** English
- Manager:** new Consultant
- Receive Approval Request Emails:** Only if I am an approver
- Role:** Salesforce Platform
- User License:** Standard Platform User
- Active:** checked
- Marketing User:** unchecked
- Offline User:** unchecked
- Knowledge User:** unchecked
- Flow User:** unchecked
- Service Cloud User:** unchecked
- Site.com Contributor User:** unchecked
- Site.com Publisher User:** unchecked
- WDC User:** unchecked
- Mobile Push Registrations:** View
- Data.com User Type:** Data.com User
- Accessibility Mode (Classic Only):** unchecked
- Debug Mode:** unchecked
- High-Contrast Palette on Charts:** unchecked
- Load Lightning Pages While Scrolling:** checked

Configuring user Approval setting :

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

- Single Sign On Information:** Federation ID is empty.
- Locale Settings:** Time Zone is set to (GMT+05:30) India Standard Time (Asia/Kolkata), Locale is English (India), and Language is English.
- Approver Settings:** Delegated Approver is set to new Consultant, Manager is set to new Consultant, and Receive Approval Request Emails is set to Only if I am an approver.

Create an Approval Process for Property Object

Create an Email Template:

The screenshot shows the Salesforce Email Templates page. The left sidebar includes sections for Email Templates (Recent, Created by Me, Private Email Templates, Public Email Templates, All Email Templates), Folders (All Folders, Created by Me, Shared with Me), and a To Do List. The main content 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 content area has tabs for Details and Related. Under Details, there are sections for Information (Email Template Name: Approval Template, Description: EduConsultPro has approved the consultant, Made in Email Template Builder) 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

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

Email Template Rejection Template

Details Related

Information

Email Template Name: Rejection Template
Description:
Mode in Email Template Builder:

Related Entity Type: Appointment
Folder: EduConsultPro

Message Content

Subject: EduConsultPro has rejected your consultant
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}},
EduConsultantPro

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

Email Template Submission Template

Details Related

Information

Email Template Name: Submission Template
Description:
Mode in Email Template Builder:

Related Entity Type: Appointment
Folder: EduConsultPro

Message Content

Subject: Appointment request with EduConsultPro
HTML Value:

Dear {{!Appointment__c.Student_Name__c}},

I hope that 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
- Modified By: Chethan KS 26/11/2024, 3:49 pm
- Active:
- Next Automated Approver Determined By: Manager of Record Submitter
- Allow Submitters to Recall Approval Requests:

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

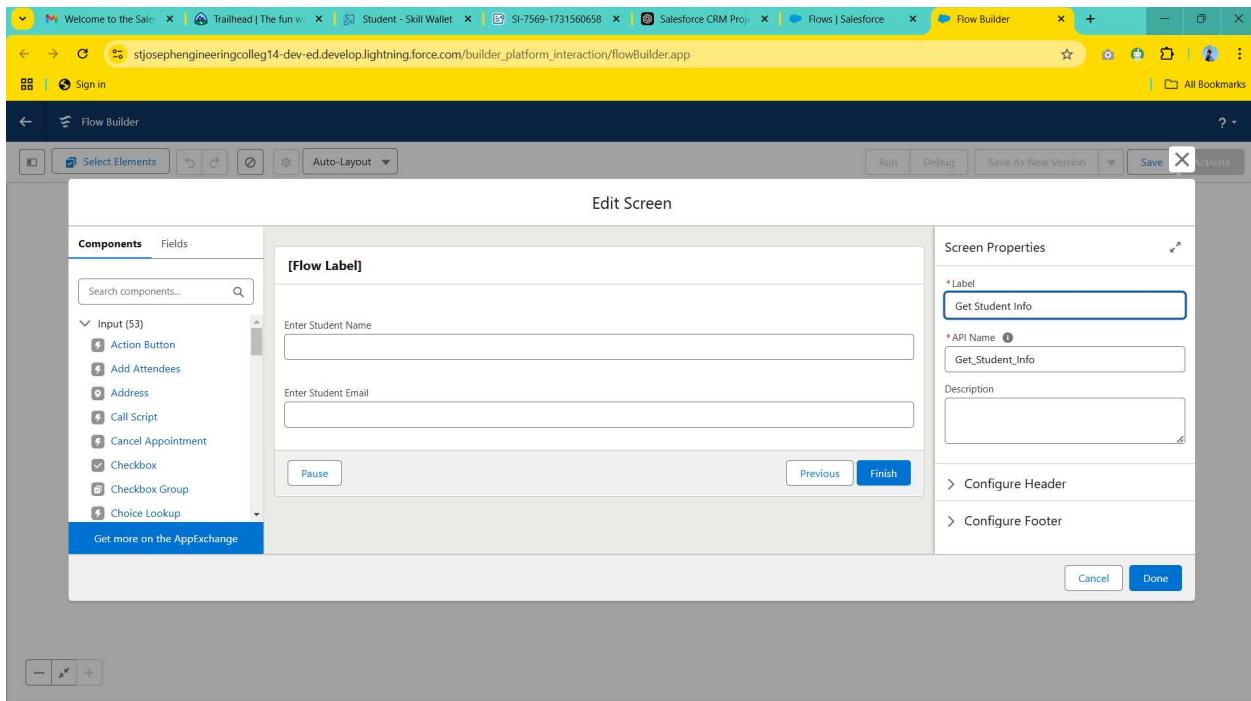
The screenshot shows the Salesforce Flow Builder interface. On the left, a flow diagram is displayed with a green start icon labeled "Start Record-Triggered Flow". Below it, the "Object: Appointment" and "Trigger: A record is created" are specified. To the right, the "Configure Start" panel is open, showing the trigger configuration: "A record is created" is selected under "Trigger the Flow When:". The "Set Entry Conditions" section is collapsed. In the "Optimize the Flow for:" section, "Fast Field Updates" is checked, and "Actions and Related Records" is selected, which is highlighted with a blue border.

Add an Action Element

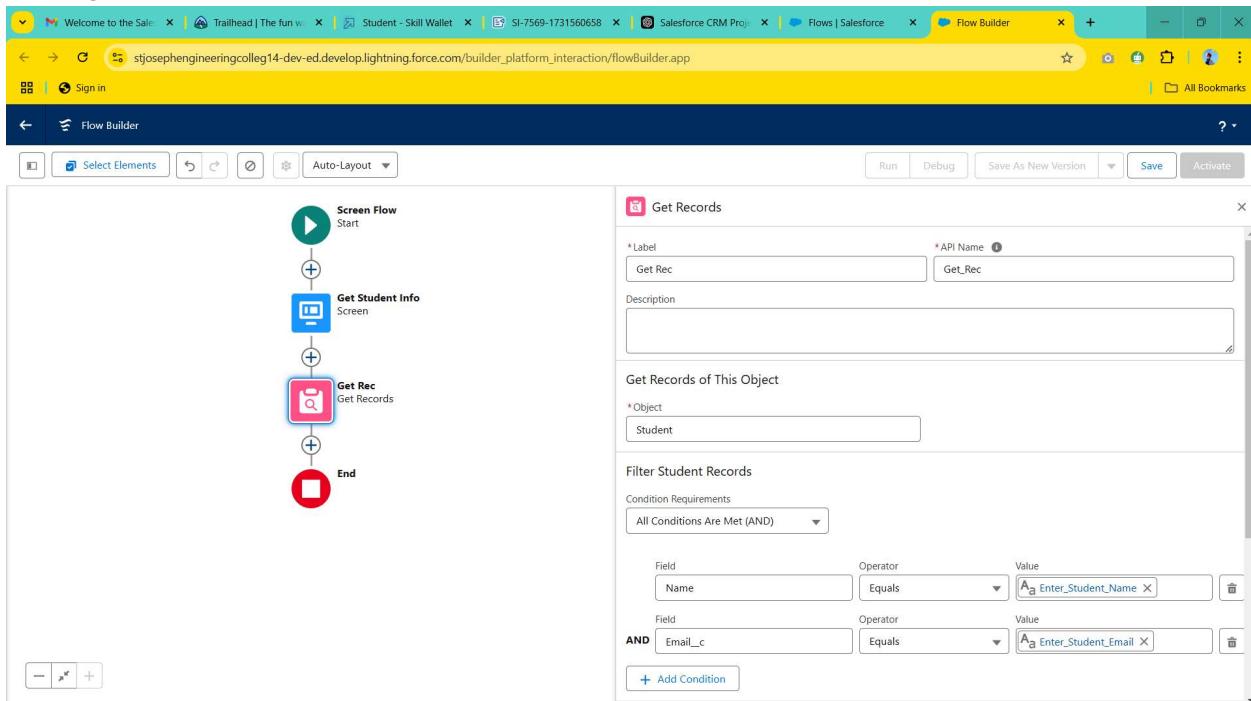
The screenshot shows the Salesforce Flow Builder interface. On the left, a flow diagram is displayed with a green start icon labeled "Record-Triggered Flow Start" and a blue action icon labeled "Approval SubFlow Action". The "Run Immediately" option is selected. To the right, the "Submit for Approval" panel is open, showing the action configuration: "Approval_SubFlow" is selected under "Action Name", and "Submit for Approval" is selected under "Action Type". The "Set Input Values for the Selected Action" section is open, showing input fields for "Record ID" (set to "Triggering Appointment_c > Record ID"), "Approval Process Name Or ID" (disabled), "Next Approver IDs" (disabled), and "Skip Entry Criteria" (disabled).

Create a ScreenFlow for Existing Student to Book an Appointment

Add screen element



add a get record element



Display Student details

EduConsultantPro Existing Student Flow

Edit Screen

Components Fields

Search components...

Input (53)

- Input
- Action Button
- Add Attendees
- Address
- Call Script
- Cancel Appointment
- Checkbox
- Checkbox Group
- Choice Lookup

Name: {!Get_Rec.Name}
First Name: {!Get_Rec.First_Name__c}
Last Name: {!Get_Rec.Last_Name__c}
Email: {!Get_Rec.Email__c}
Phone: {!Get_Rec.Phone__c}
Gender: {!Get_Rec.Gender__c}
City: {!Get_Rec.City__c}
Address: {!Get_Rec.Address__c}

How may I help you?

- Book an Appointment
- Immigration Case

Pause **Previous** **Finish**

Screen Properties

Label: Display Student Details
API Name: Display_Student_Details
Description:

Configure Header **Configure Footer**

Done

Add decision element

EduConsultantPro Existing Student Flow

Edit Screen

Select Elements **Auto-Layout**

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

Get Rec **Get Records**

Display Student Details **Screen**

Appointment or Case **Decision**

Appointment **Case** **Default**

Appointment Booking Screen **Screen**

Create Student Case Subflow

Get Consultant Rec **Get Records**

End

Decision

Label: Appointment or Case
API Name: Appointment_or_Case

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
Appointment	Label: Appointment Outcome API Name: Appointment
Case	Label: Case Condition Requirements to Execute Outcome: All Conditions Are Met (AND)
Default	Resource: A...t Details > How may I help you Operator: Equals Value: A Book_an_Appointment

Add Condition

For each path, one new case type, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that 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

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

Components Fields

Search components...

Input (53)

- Action Button
- Add Attendees
- Address
- Call Script
- Cancel Appointment
- Checkbox
- Checkbox Group
- Choice Lookup

Get more on the AppExchange

Create Appointment Create Records

Appointment Date/Time

Date Time

Purpose/Topic

Notes

Screen Properties

*Label: Appointment Booking Screen

*API Name: Appointment_Booking_Screen

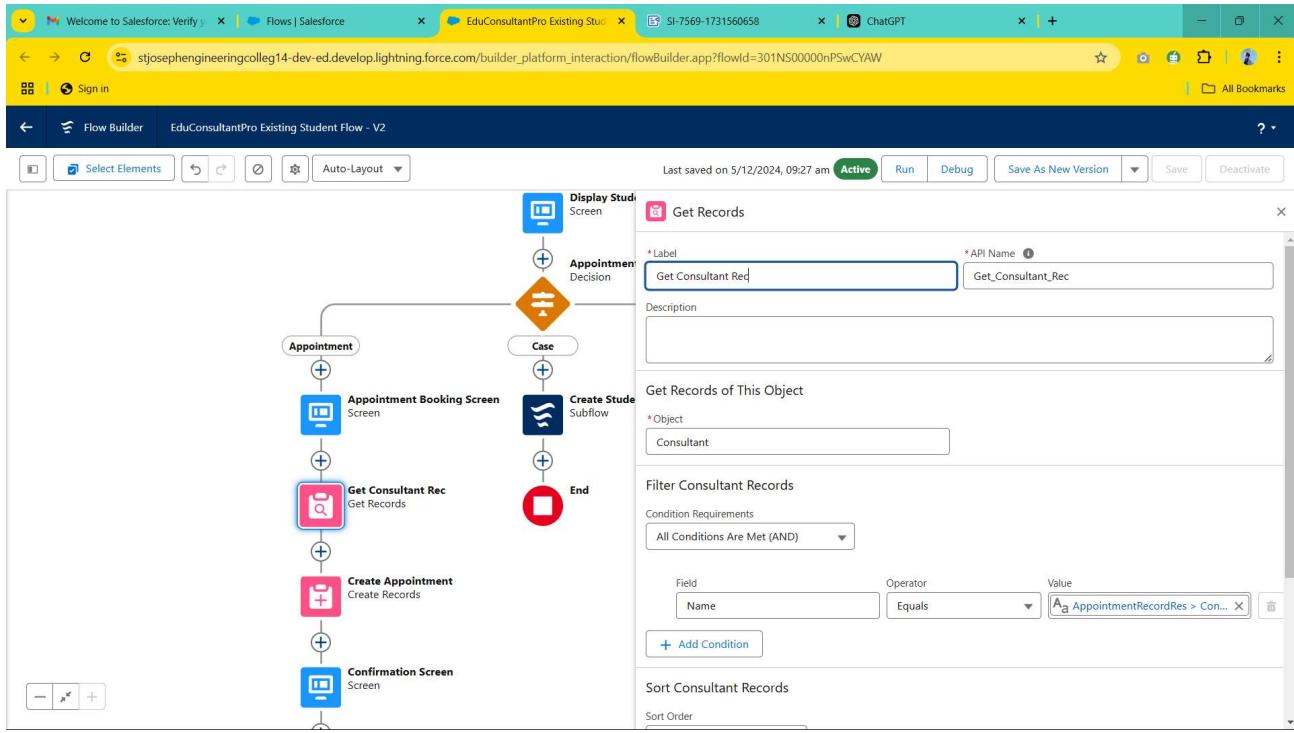
Description:

> Configure Header

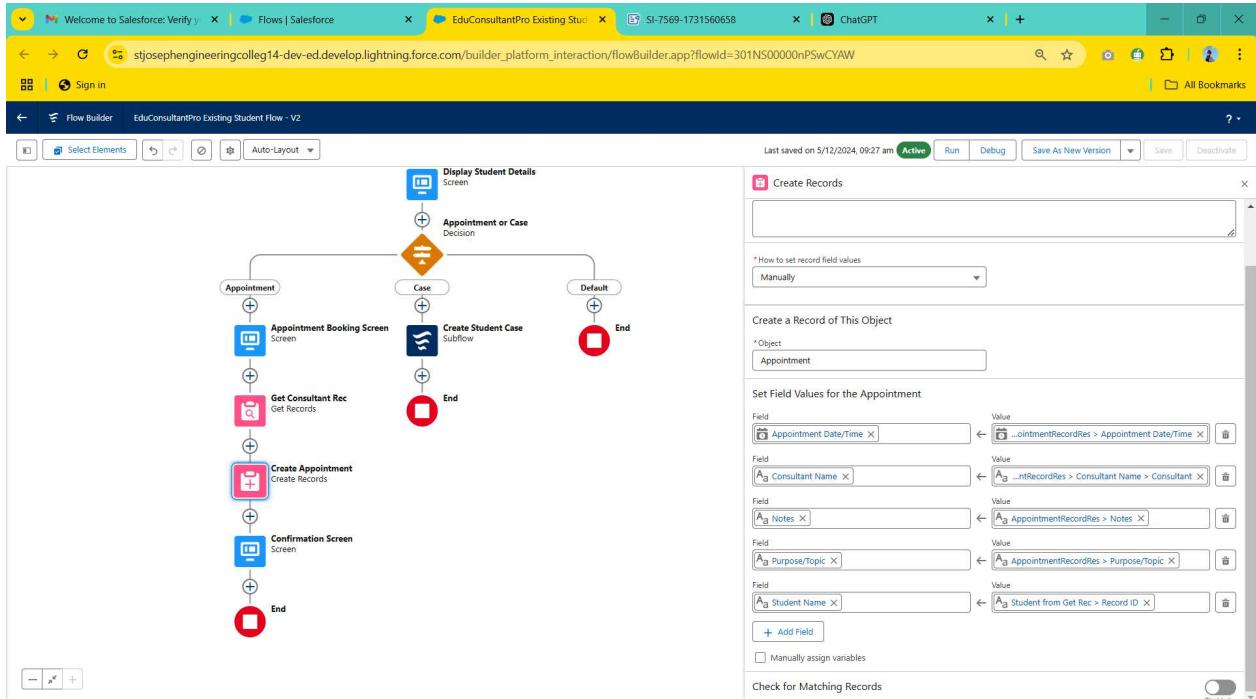
> Configure Footer

Cancel Done

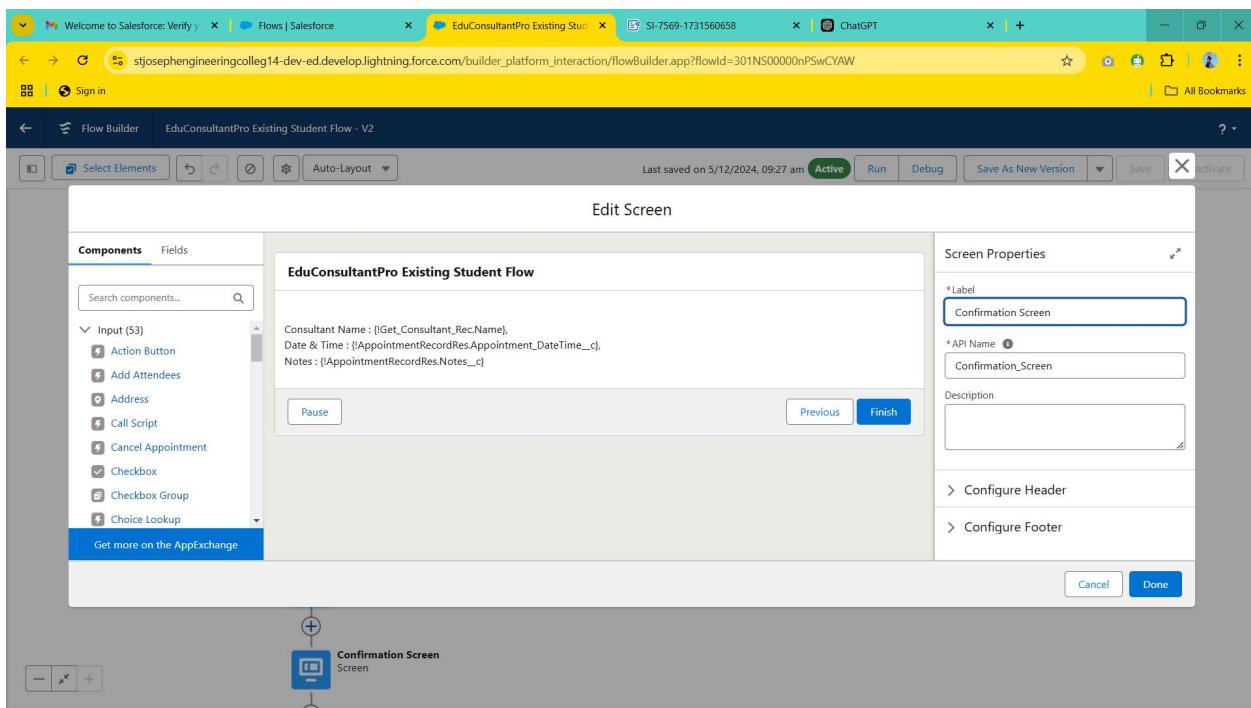
Get Records



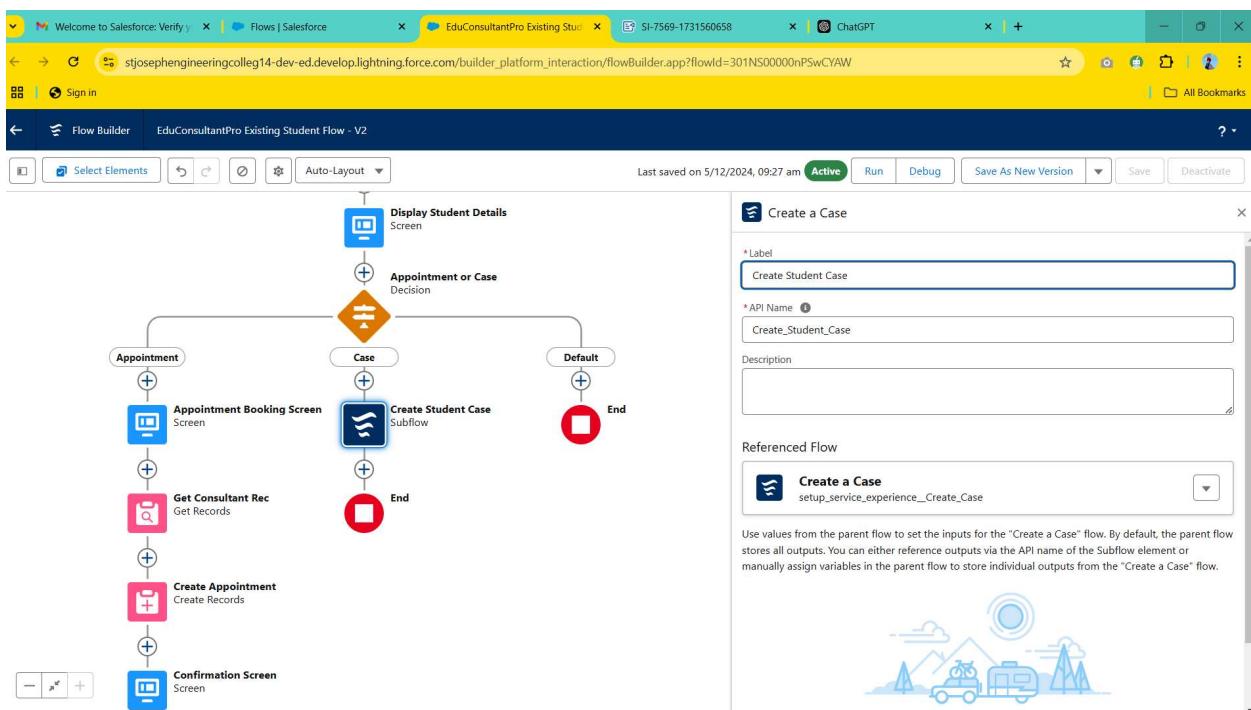
Create Appointment



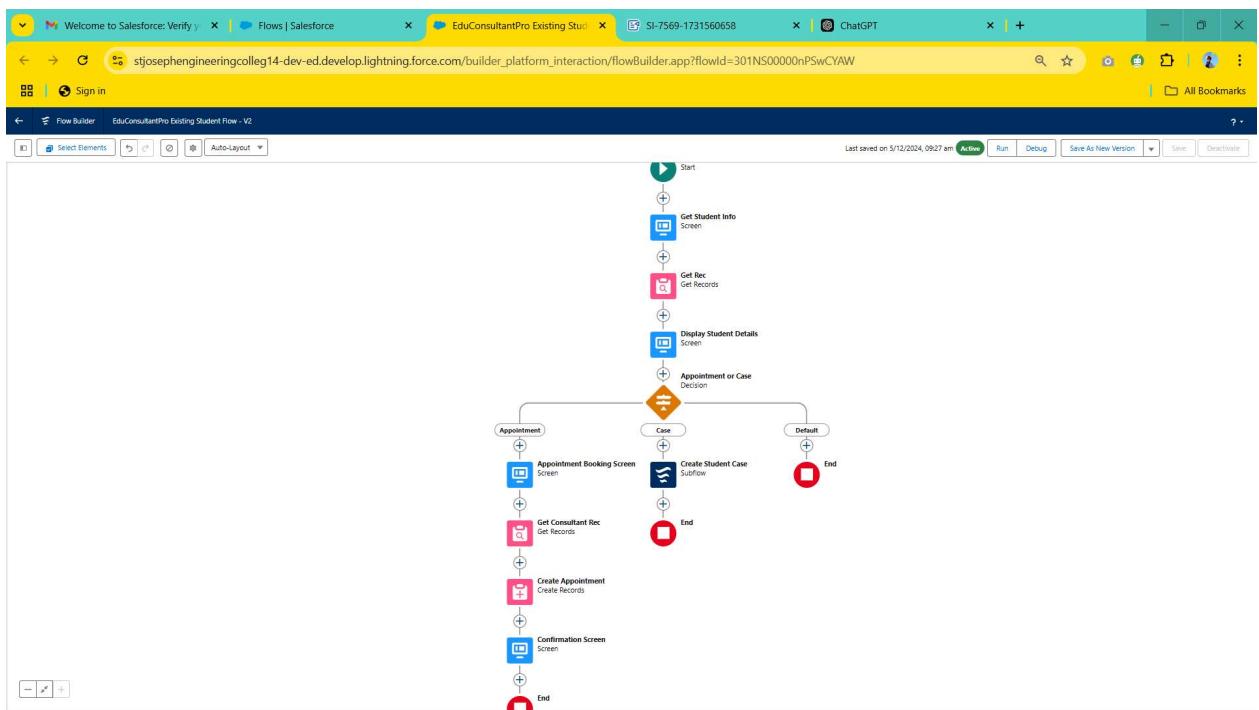
Confirmation Screen



Create a subflow

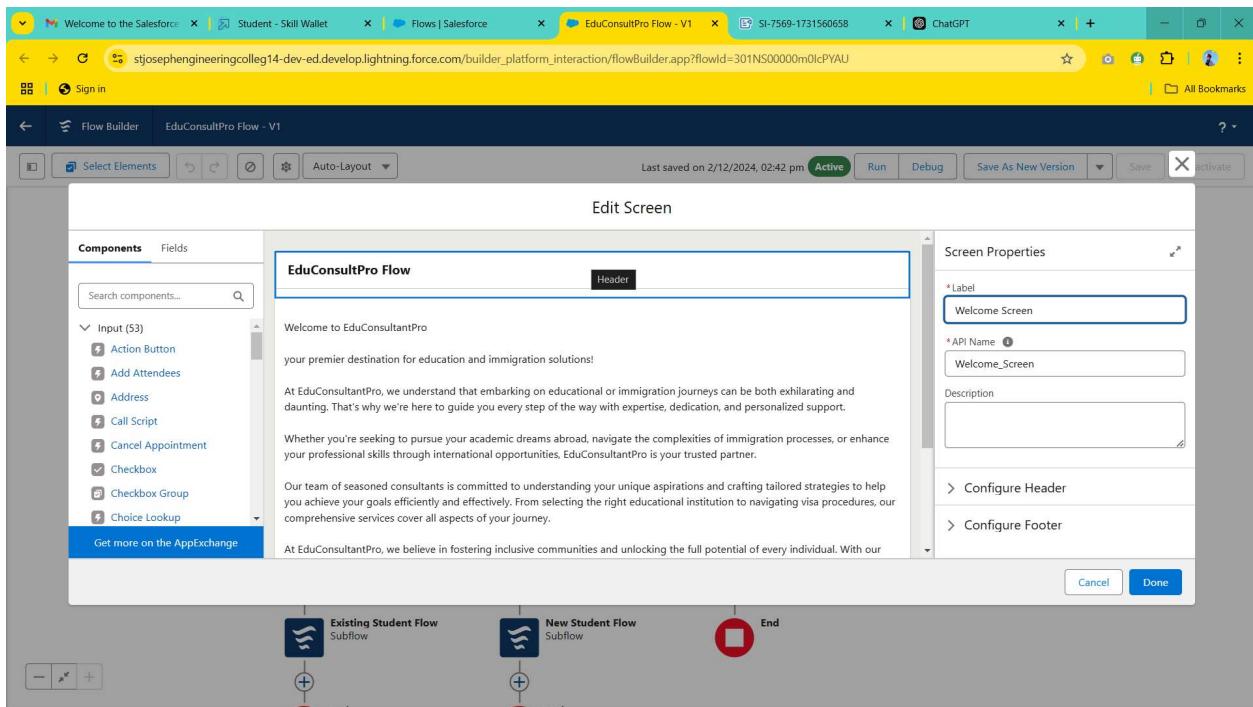


Entire Flow

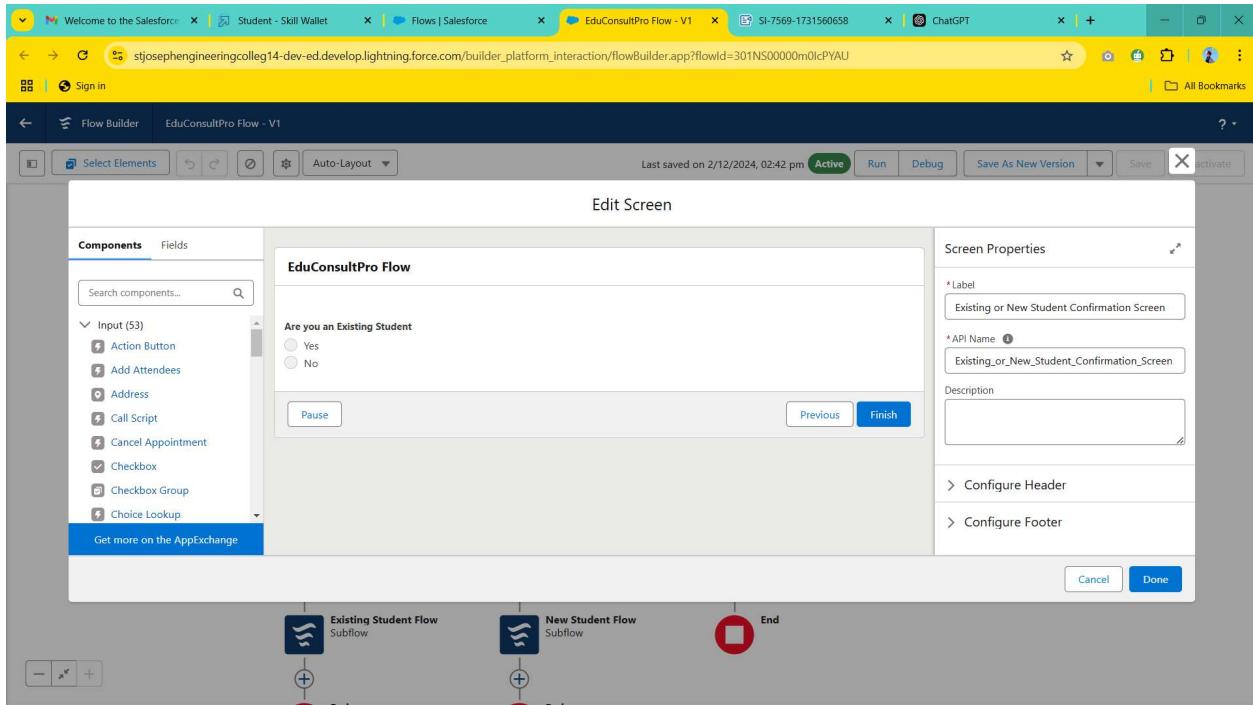


Create a ScreenFlow to Combine all the flows at one place

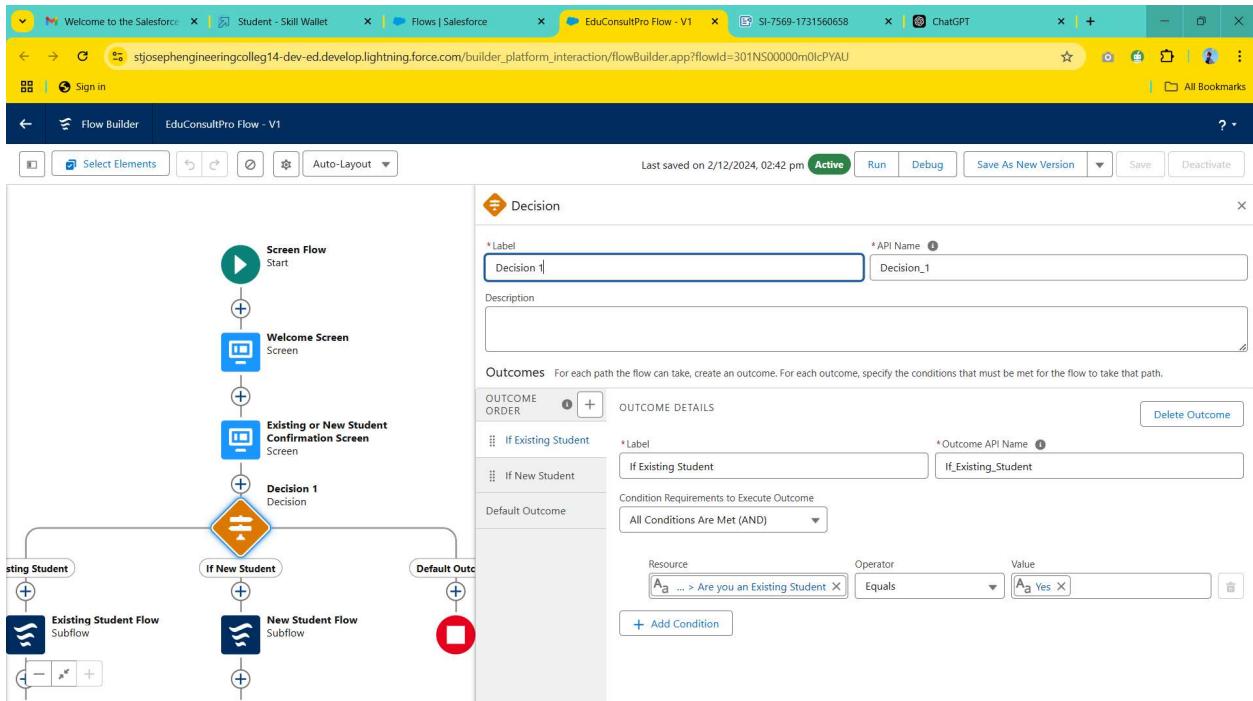
Add a Welcome screen element



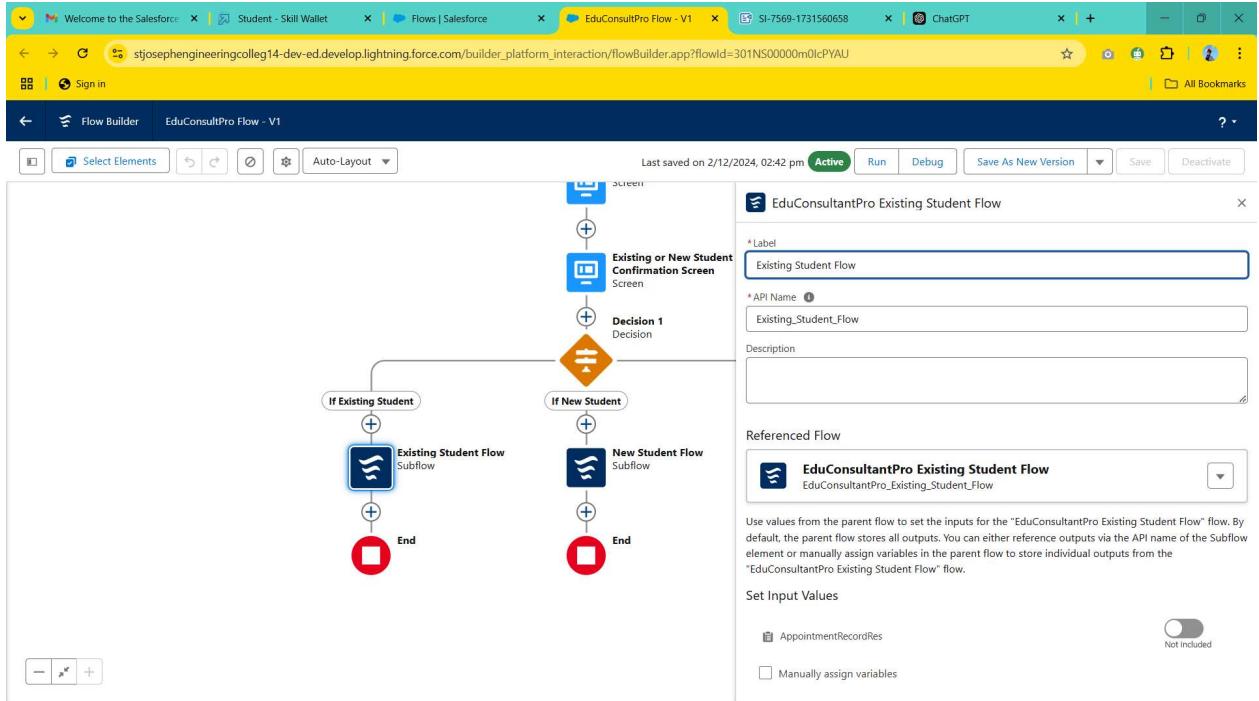
Add a screen element to ask whether he is new student or old student



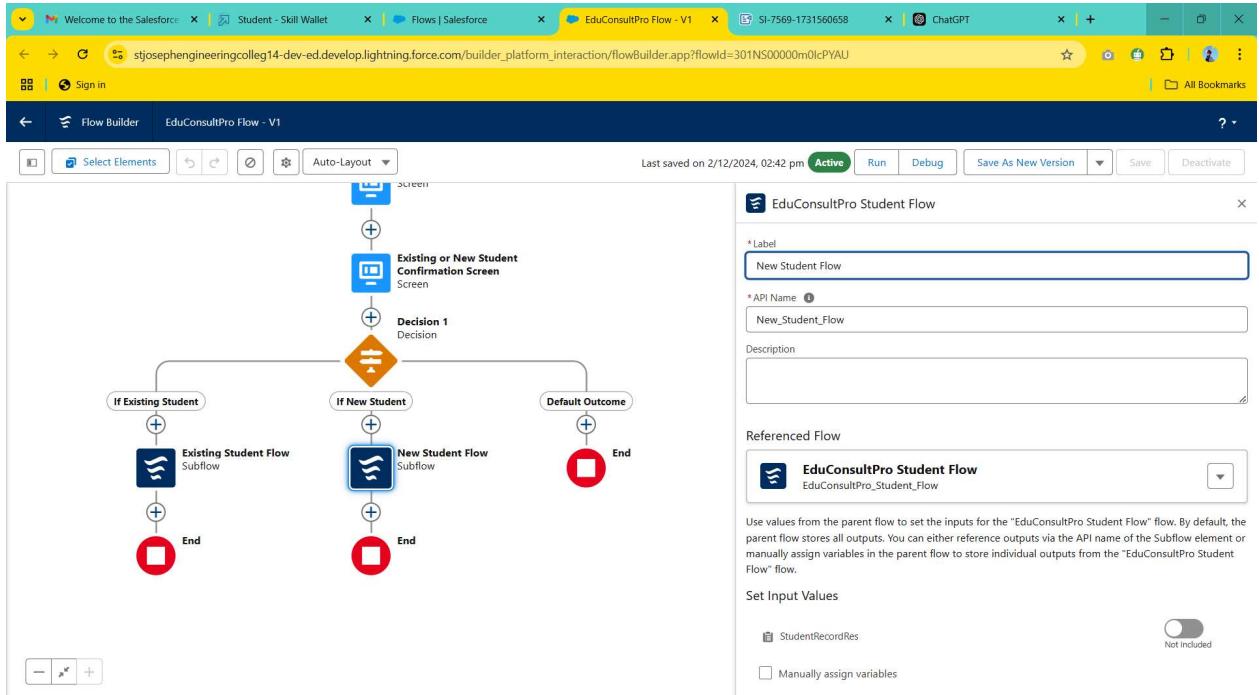
Add decision element

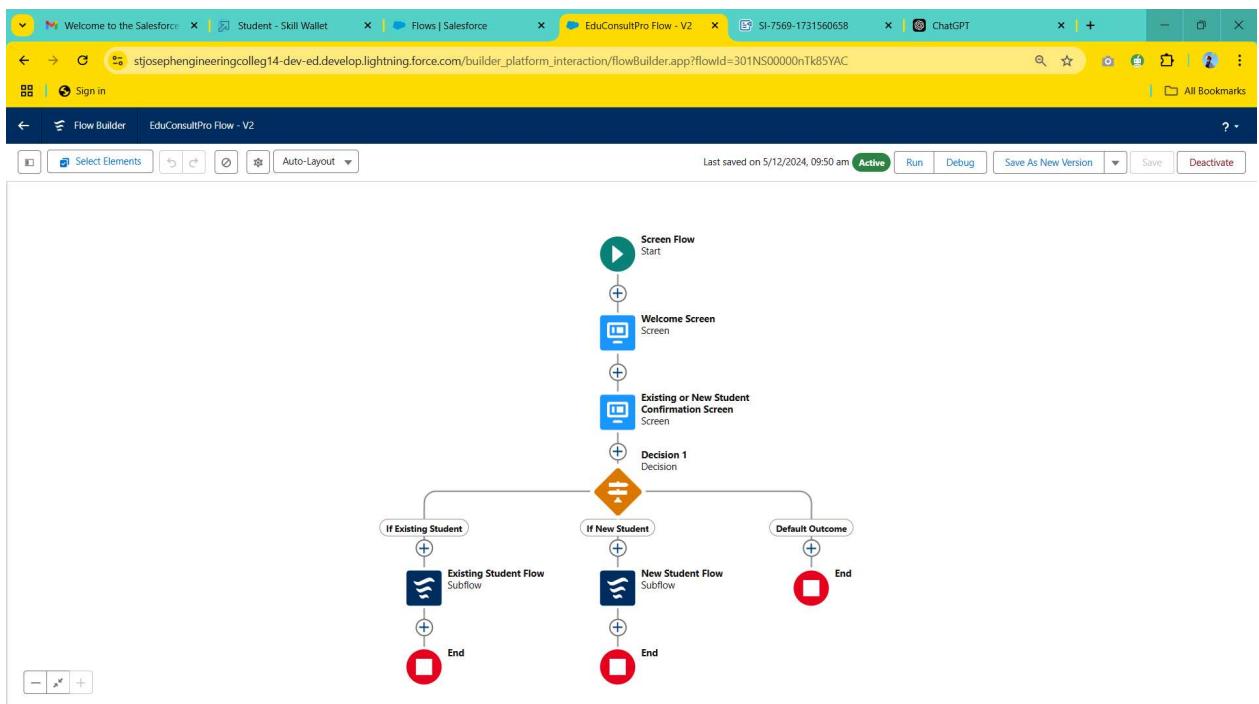


Add a subflow if it is a existing student



Add a subflow if it is new student





Create a lightning app page

