

A CRM Application to Manage the Services offered by an Institution

Introduction:

The EduConsultPro Home Page is thoughtfully designed to serve as the central platform for managing student information, consultant interactions, appointments, and overall educational or immigration workflows. This intuitive and user-friendly interface enables administrators, consultants, and users to perform key tasks efficiently, ensuring a seamless experience.

With a focus on efficiency, organization, and productivity, the EduConsultPro Home Page integrates powerful tools and streamlined processes to support educational consultancy services.

Key Features of the Home Page

1. Centralized Navigation

The home page provides quick and easy access to essential components, including student management, appointments, courses, consultants, and case handling. Users can navigate effortlessly to view or update records without losing time.

2. Interactive Flow Integration

The page includes the EduConsultPro Flow component, ensuring a guided and automated process for both new and existing students. From onboarding new students to managing appointments and case processes, the integrated flows simplify complex operations.

3. Efficient Student & Consultant Management

- Student Records: Users can create, view, and update student records, ensuring all relevant data, such as student names, emails, and appointments, are organized.
- Consultant Coordination: Seamlessly manage consultant information, including assignment, appointment bookings, and approval workflows.

4. Appointment Scheduling and Tracking

EduConsultPro facilitates smooth booking, rescheduling, and tracking of appointments. Consultants and students can confirm details quickly, ensuring effective communication and time management.

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 Setup interface with the 'Object Manager' selected. Under the 'Course' object, the 'Fields & Relationships' section is displayed. The table lists the following fields:

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 '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 a table titled 'Fields & Relationships' with 7 items, sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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

Case Type Configuration (Type View)

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 Configuration (Status View)

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

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

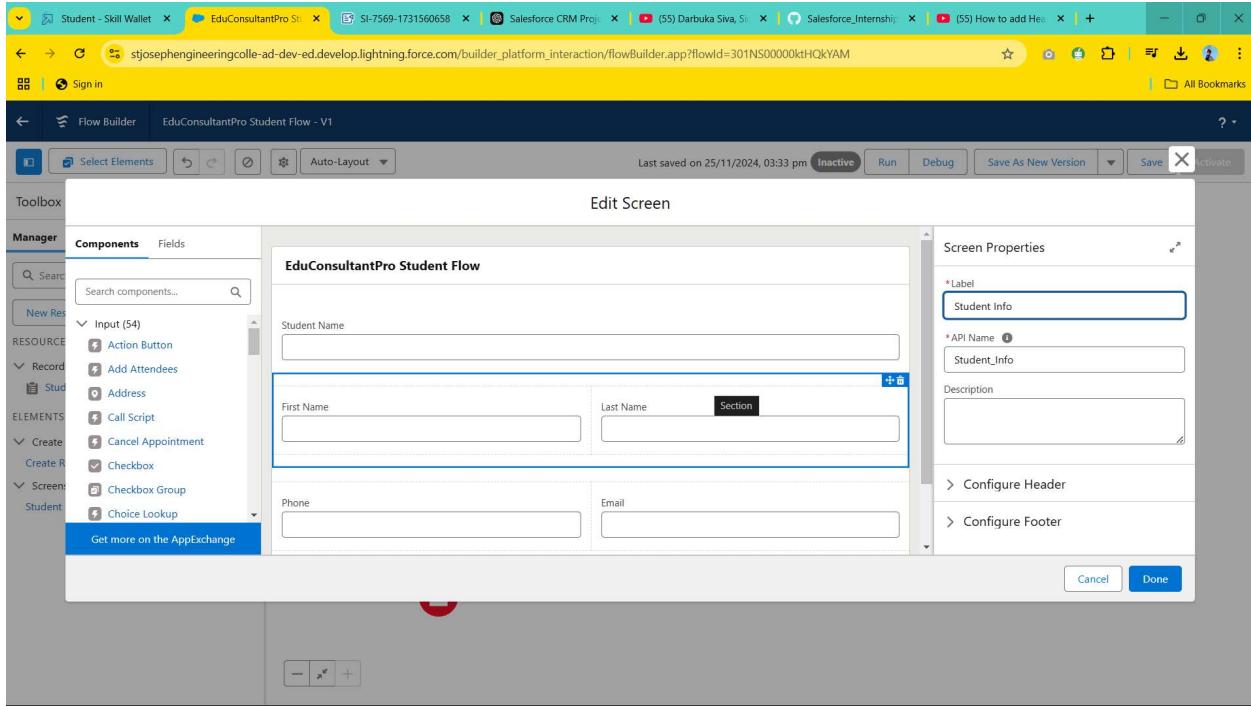
- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods

Selected Items

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

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:

- Start (Screen Flow)
- Student Info Screen
- Create Student Record (Create Records)
- End

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

- 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)

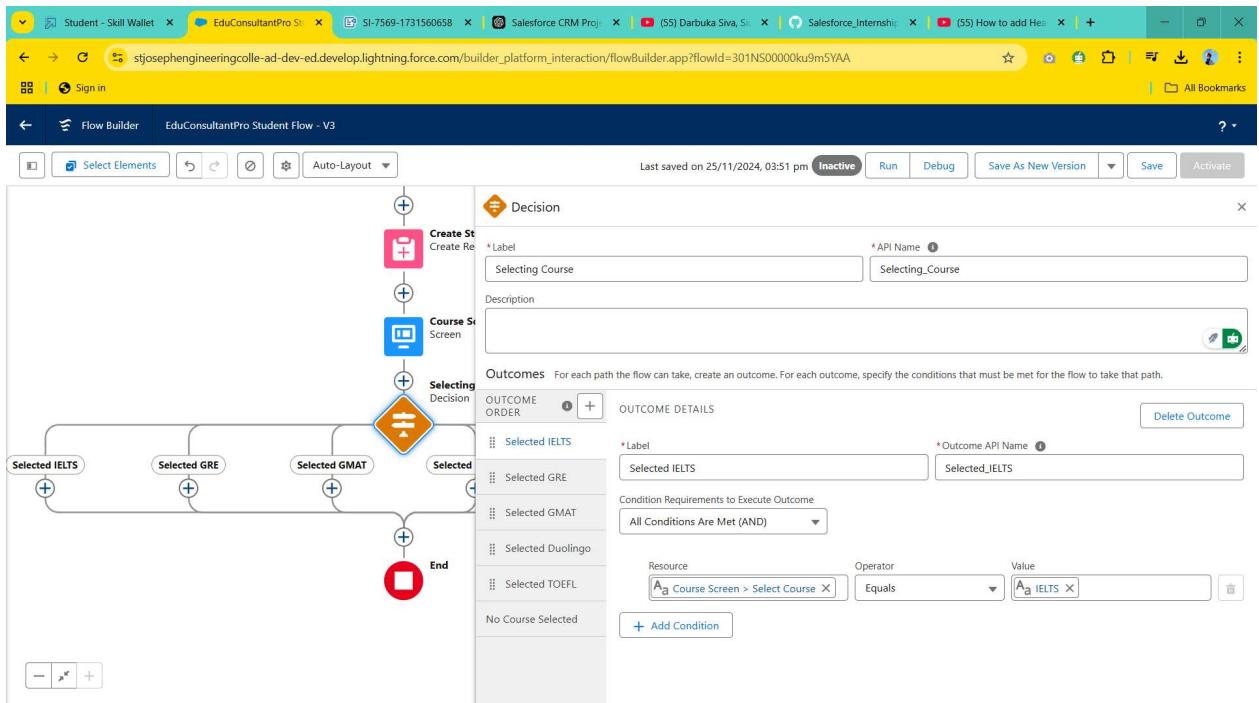
Add Screen Element:

The screenshot shows the Salesforce Flow Builder interface with the title "EduConsultantPro Student Flow - V3". The "Edit Screen" dialog is open, displaying a "Select Course" screen with a "Picklist" input field. 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 others. The "Fields" tab is also visible. On the right, a "Picklist" configuration pane is open, listing course options:

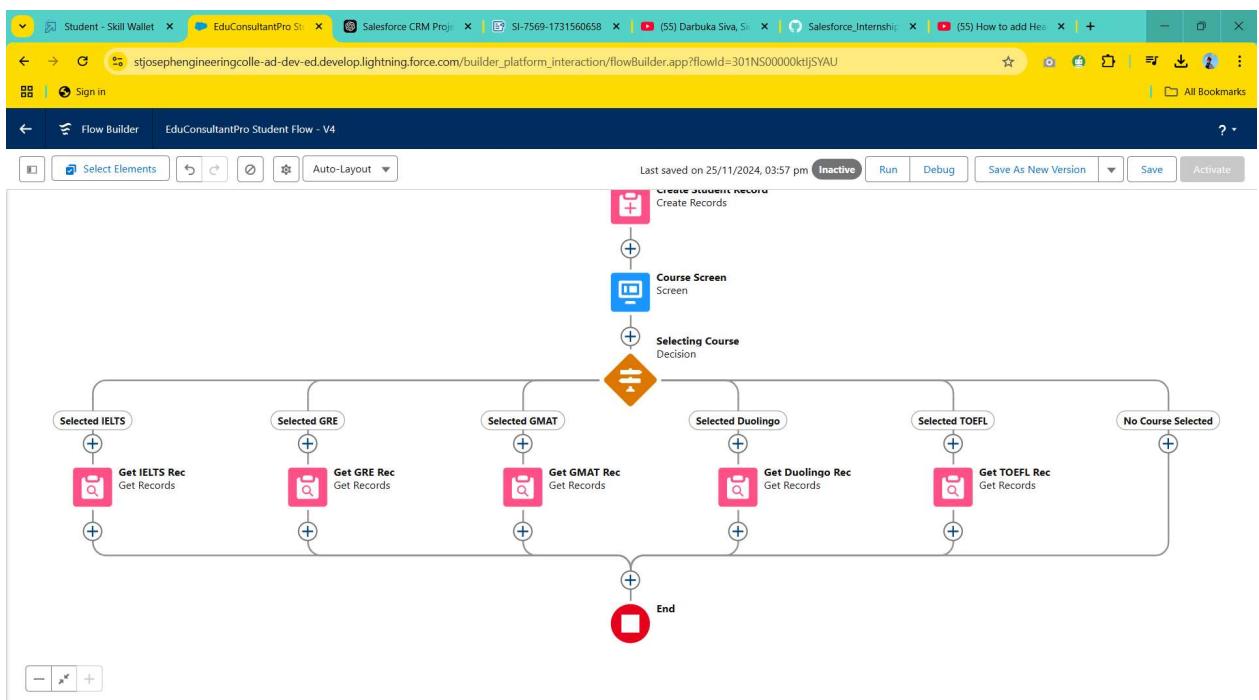
- (IELTS)
- (GRE)
- (GMAT)
- (Duolingo)
- (TOEFL)

Buttons for "Cancel" and "Done" are at the bottom right of the configuration pane.

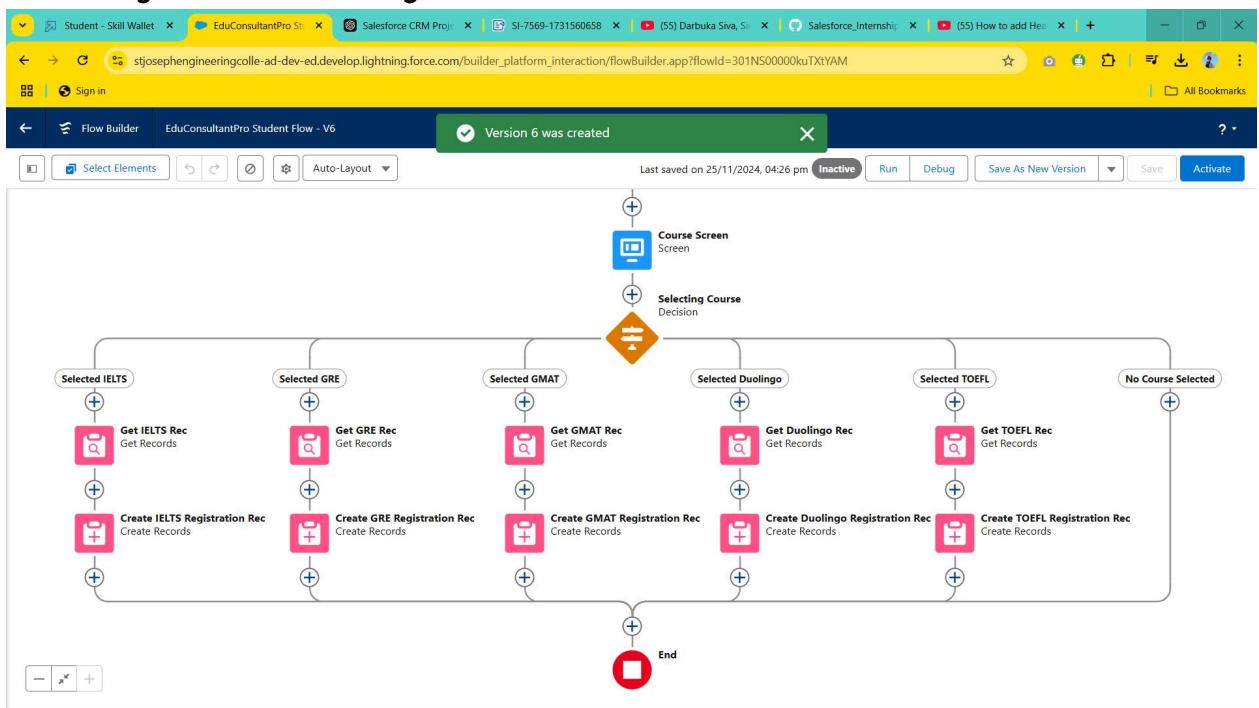
Add Decision Element



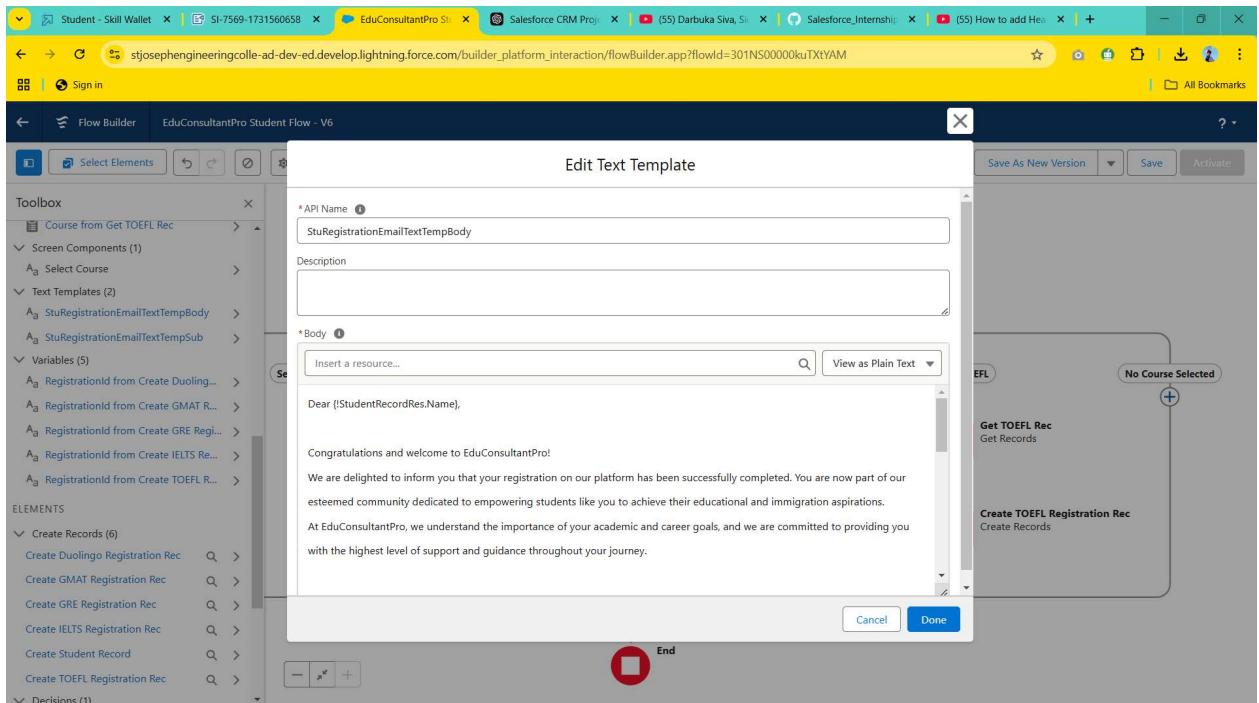
Add Get Record Element



Create Registration record using record element



Create Email Text Template Variables for email body and subject



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

Edit Text Template

API Name: StuRegistrationEmailTextTempSub

Description: (empty)

Body:

Insert a resource... View as Plain Text

Welcome to EduConsultantPro: Your registration is complete!

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)

Flow Diagram:

```

graph TD
    Start(( )) --> GetTOEFL[Get TOEFL Rec  
Get Records]
    GetTOEFL --> NoCourseSelected{No Course Selected}
    NoCourseSelected --> End((End))
    GetTOEFL --> CreateTOEFL[Create TOEFL Registration Rec  
Create Records]
    CreateTOEFL --> End
  
```

Add an Action Element

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

Action Details:

Action Type: Send Email to Student

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 Re...
 - A₃ RegistrationId from Create IELTS R...
 - 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

Flow Diagram:

```

graph TD
    Start(( )) --> GetGMAT[Get GMAT Rec  
Get Records]
    GetGMAT --> CreateGMAT[Create GMAT Registration Rec  
Create Records]
    CreateGMAT --> GetDuolingo[Get Duolingo Rec  
Get Records]
    GetDuolingo --> CreateDuolingo[Create Duolingo Registration Rec  
Create Records]
    CreateDuolingo --> GetTOEFL[Get TOEFL Rec  
Get Records]
    GetTOEFL --> CreateTOEFL[Create TOEFL Registration Rec  
Create Records]
    CreateTOEFL --> SendEmail[Send Email to Student Action]
    SendEmail --> End((End))
  
```

Action Configuration (Right Panel):

- Body: StuRegistrationEmailTextTempBody X (Included)
- 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: A₃ StudentRecordRes > Email X (Included)
- 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 X (Included)

Add Success screen element

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

```

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 configuration:

- 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]
    C[Get Records] --> D[Create GMAT Registration Rec]
    E[Get Records] --> F[Create Duolingo Registration Rec]
    G[Get Records] --> H[Create TOEFL Registration Rec]
    B --> I[Send Email to Student]
    D --> I
    F --> I
    H --> I
    I --> J[Success Screen]
    J --> K[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:** 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
- User Profile:** Standard Platform User
- Active:** checked
- Mobile Push Registrations:** View
- Accessibility Mode (Classic Only):** checked
- Debug Mode:** checked
- High-Contrast Palette on Charts:** checked
- 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:

- Single Sign On Information:** Federation ID is set.
- Locale Settings:** Time Zone is set to (GMT+05:30) India Standard Time (Asia/Kolkata), Locale is set to English (India), and Language is set to 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 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 Chethan KS 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:

Subject: EduConsultPro has approved the consultant
HTML Value: Dear {{Appointment__c.Student_Name__c}},
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.SName}},
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, Chi... | Trailhead | The fun w... | 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
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, Chi... | Trailhead | The fun w... | Student - Skill Wallet | SI-7569-1731560658 | Submission Template | Salesforce CRM Pro | Appointment | Sales...

stjosephengineeringcolleg14-dev-ed.lightning.force.com/lightning//EmailTemplate/00XNS0000039zqX2AQ/view?queryScope=userFolders

Submission Template

Details Related

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
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

Appointment: Appointment Approval

Process Definition Detail

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

Initial Submission Actions

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

Approval Steps

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

Final Approval Actions

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

Final Rejection Actions

Action	Type	Description
Record Lock	Field Update	Unlock the record for editing
Rejected	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, showing the following details:

- Object:** Appointment
- Trigger:** A record is created
- Optimize for:** Actions and Related Records
- Trigger the Flow When:** A record is created (radio button selected)
- Set Entry Conditions:** None
- *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. (checkbox checked)
 - Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed (checkbox unchecked)

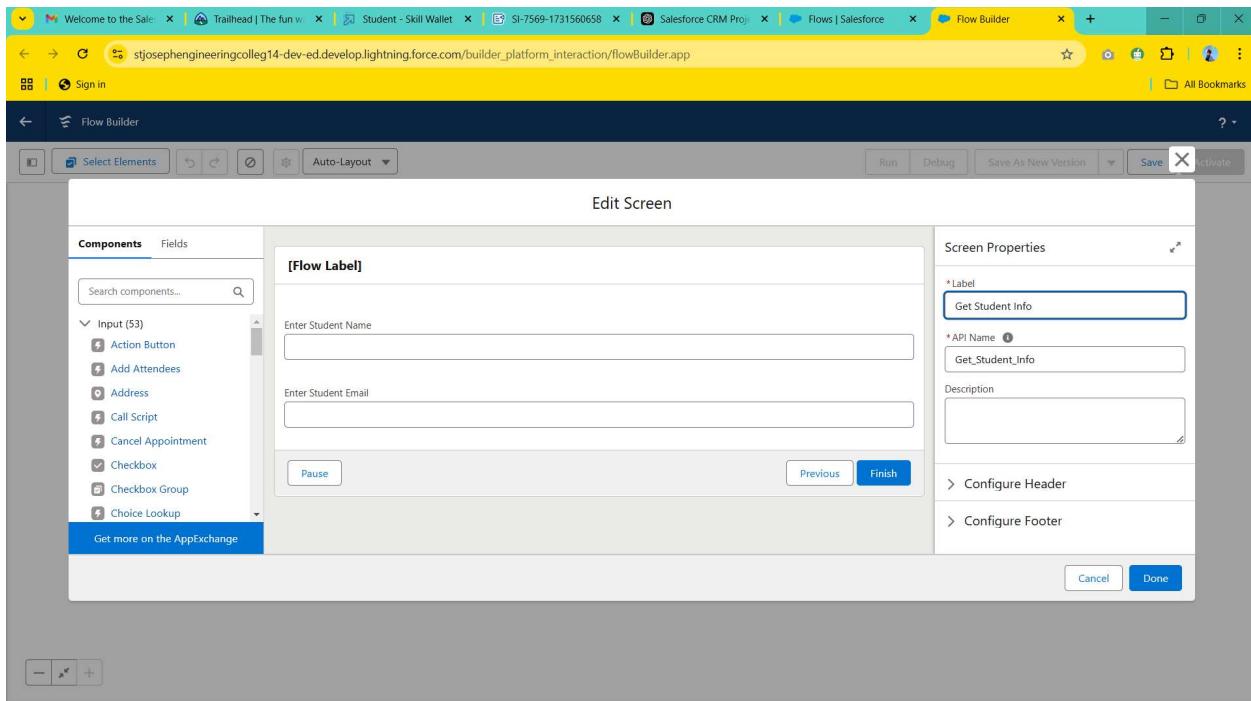
Add an Action Element

The screenshot shows the Salesforce Flow Builder interface. On the left, a flow diagram is displayed with a green start element, a blue action element labeled "Run Immediately", and a red end element. A plus sign (+) icon is positioned between the start and action elements, and another (+) icon is positioned between the action and end elements. On the right, a configuration pane titled "Submit for Approval" is open, showing the following details:

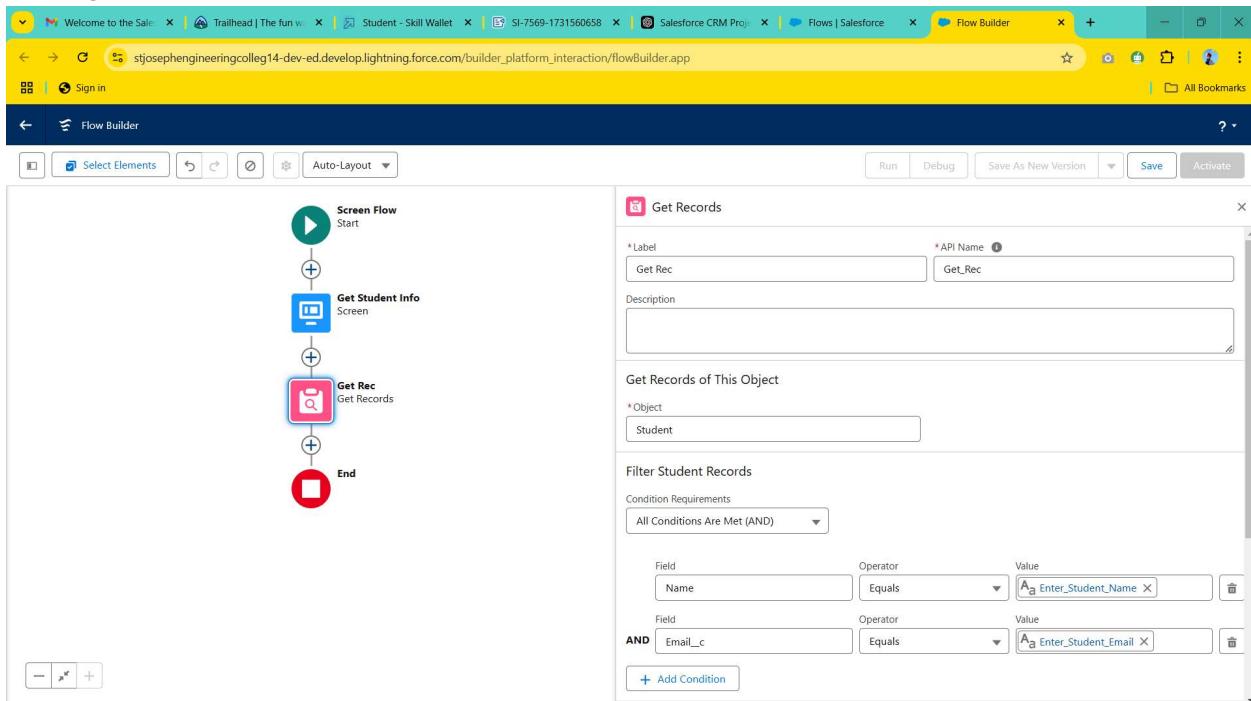
- Name:** Approval_SubFlow
- Description:** (empty text area)
- Action:** Submit for Approval (checkbox checked)
- Set Input Values for the Selected Action:**
 - A_g * Record ID: A_g Triggering Appointment_c > Record ID X (text input field)
 - A_g Approval Process Name Or ID: Not Included (checkbox unchecked)
 - A_g Next Approver IDs: Not Included (checkbox unchecked)
 - A_g Skip Entry Criteria: Not Included (checkbox unchecked)

Create a ScreenFlow for Existing Student to Book an Appointment

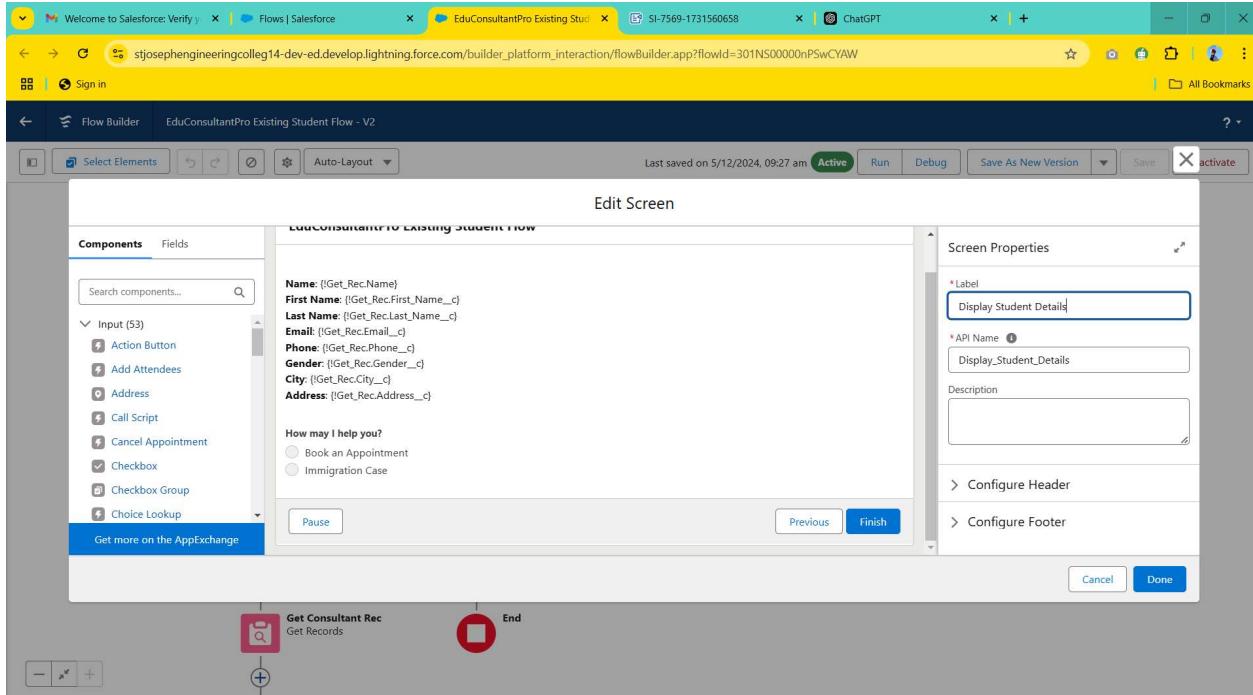
Add screen element



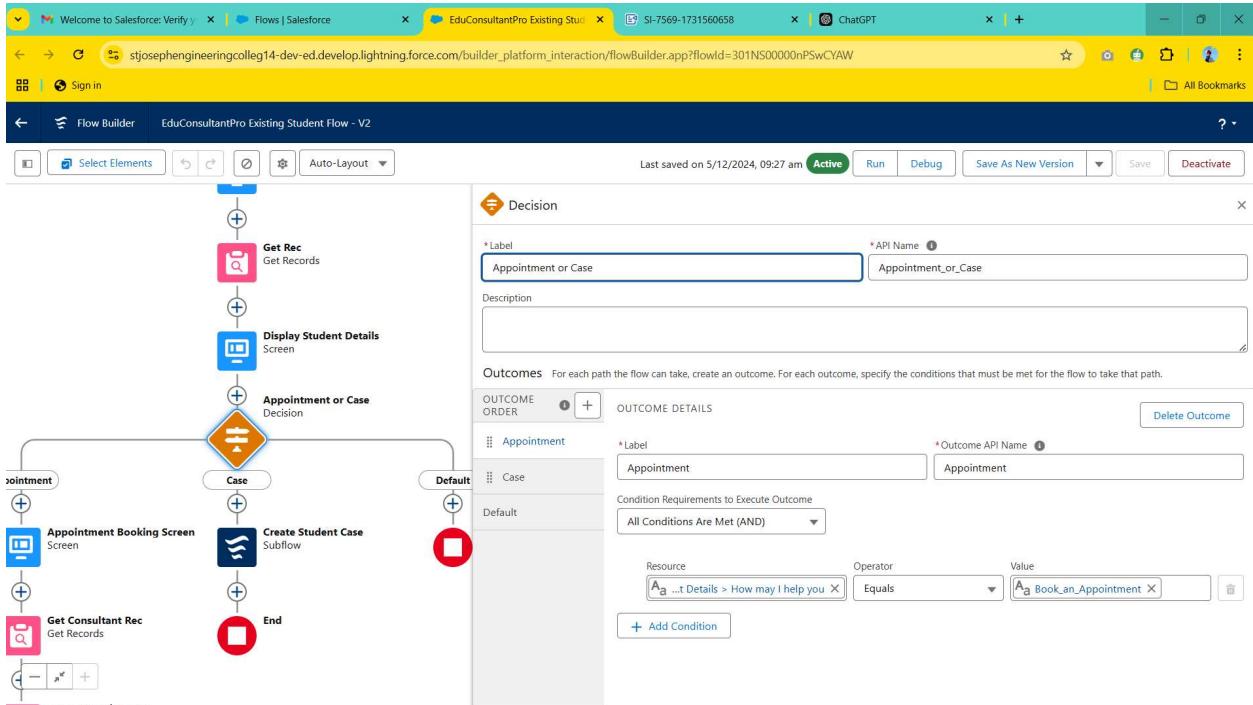
add a get record element



Display Student details



Add decision element



For each path, 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

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...

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

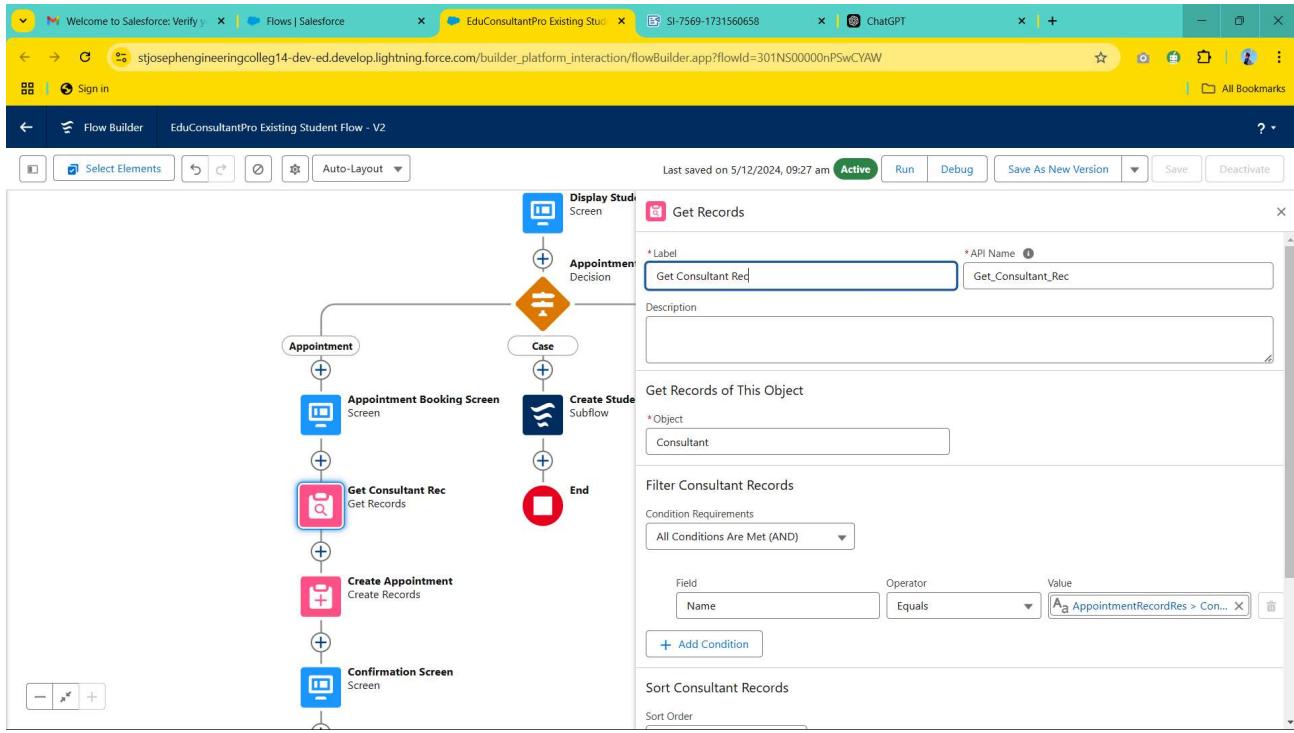
Description

> Configure Header

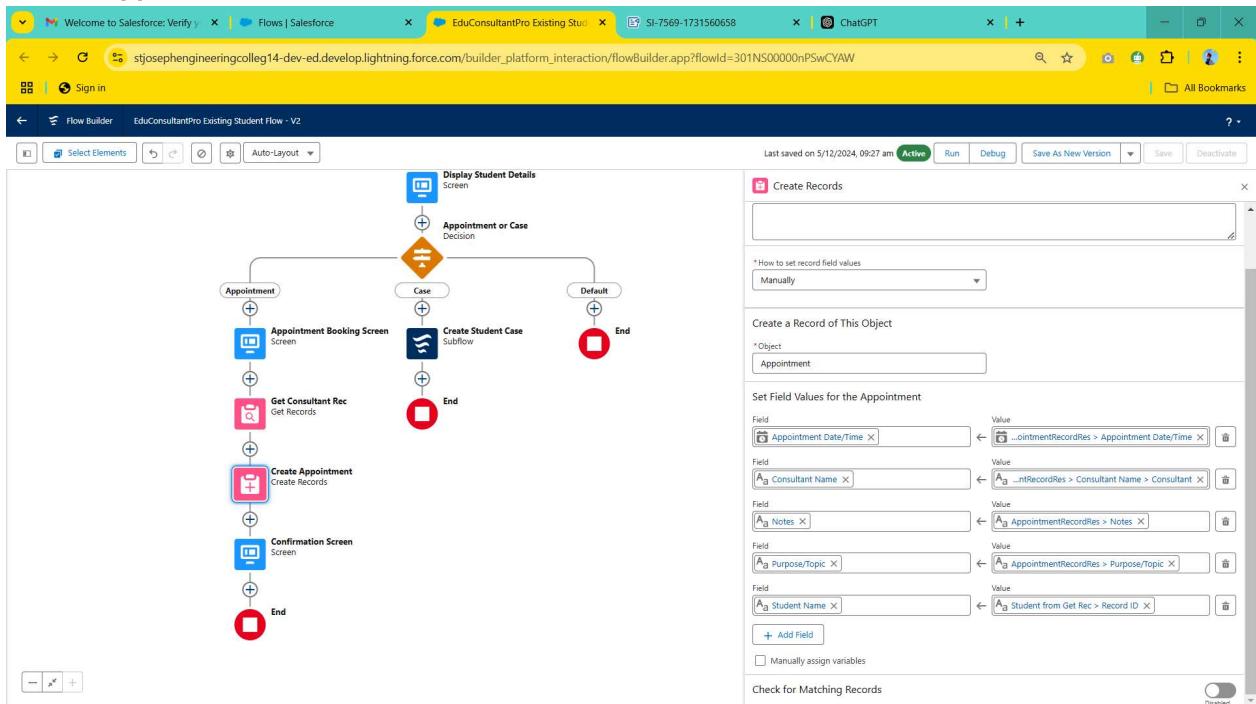
> Configure Footer

Cancel Done

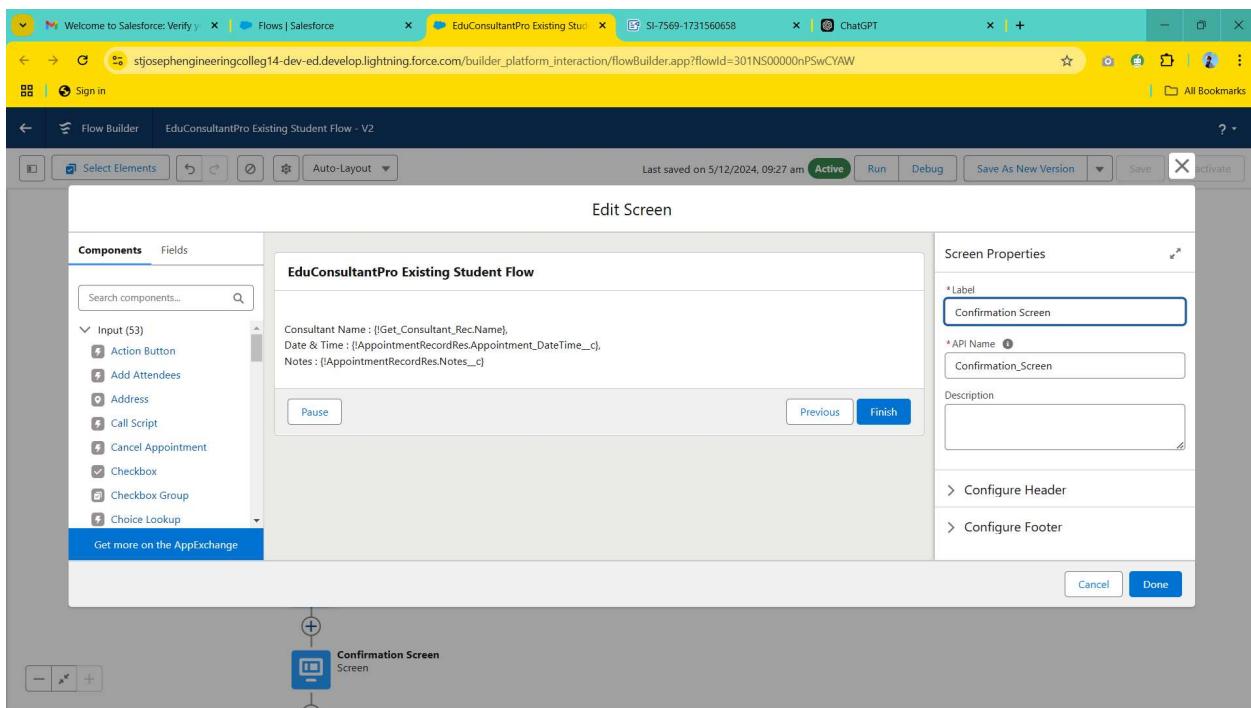
Get Records



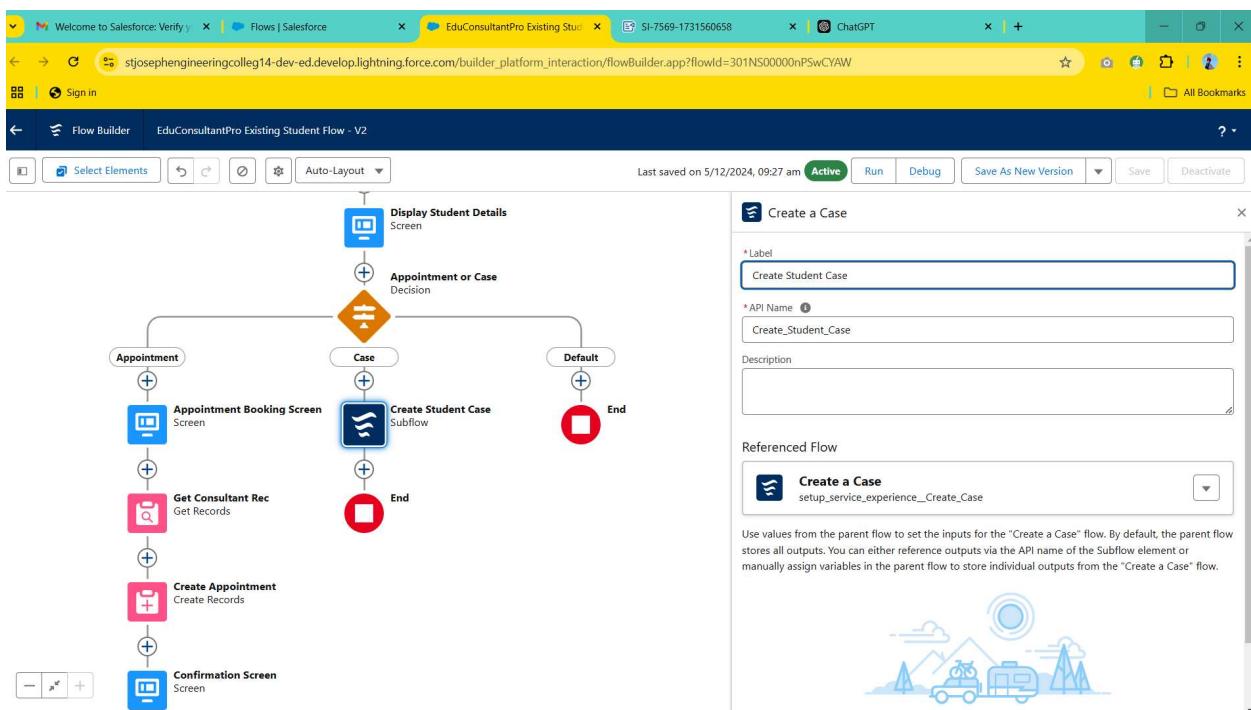
Create Appointment



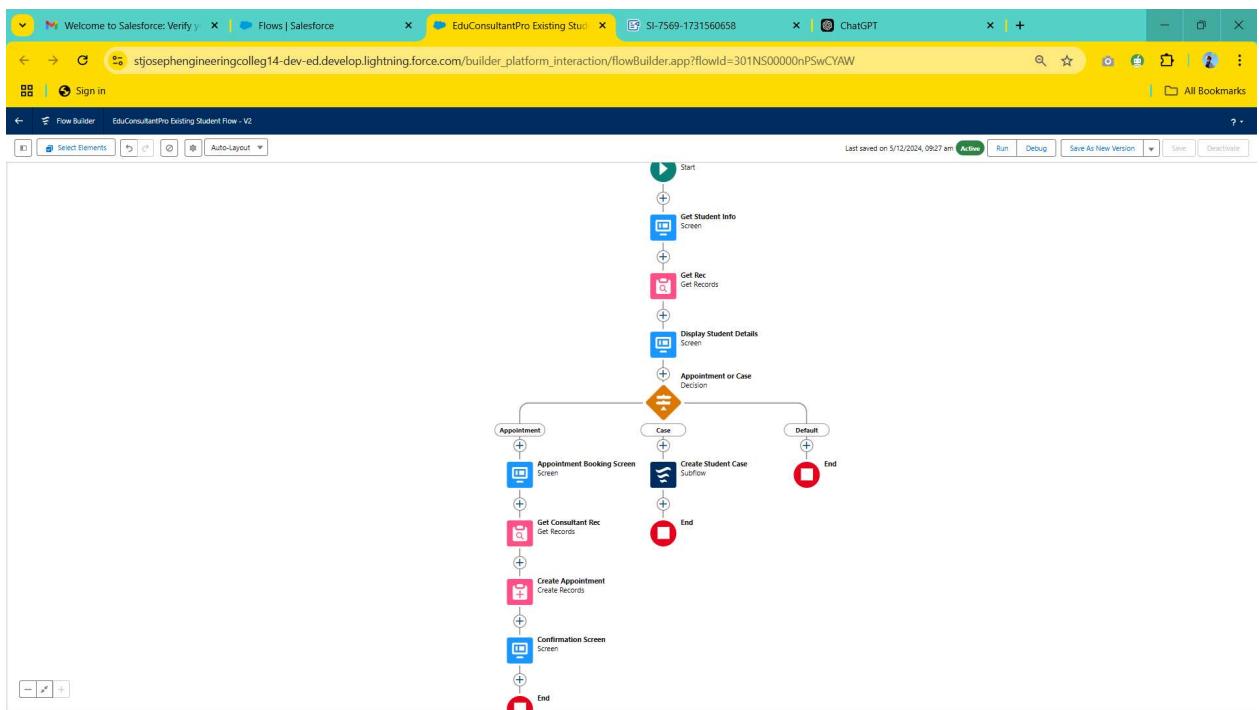
Confirmation Screen



Create a subflow

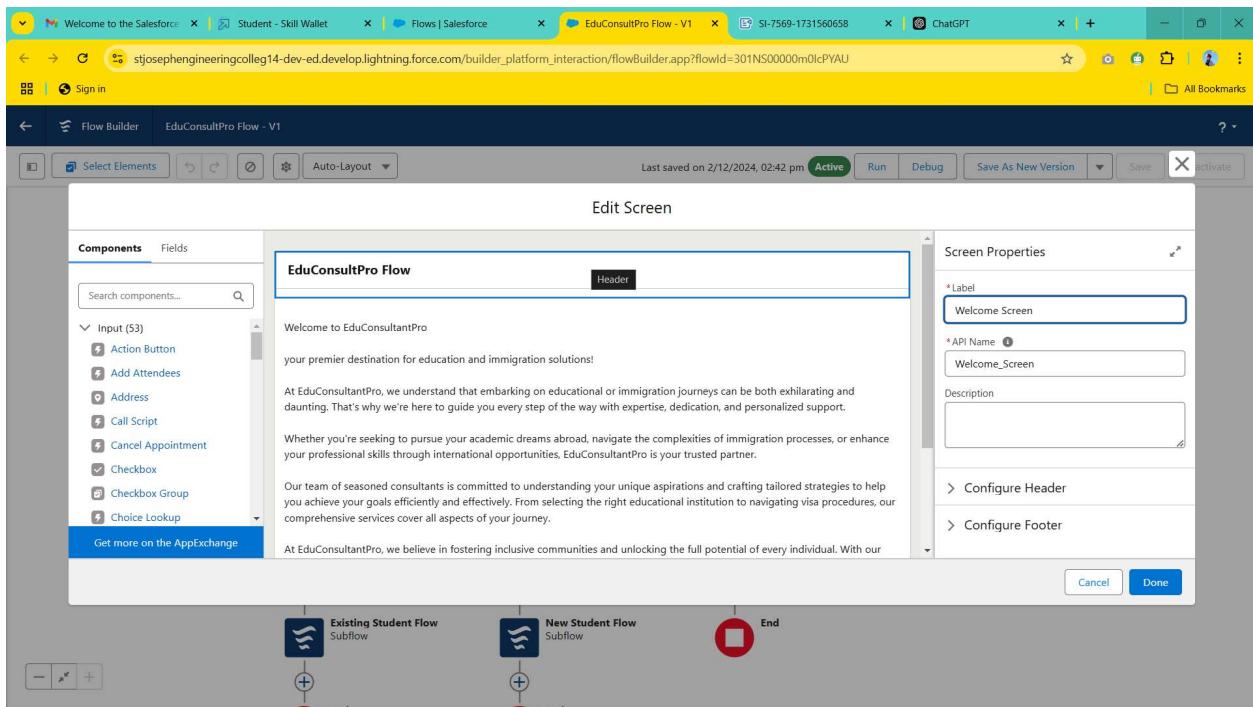


Entire Flow

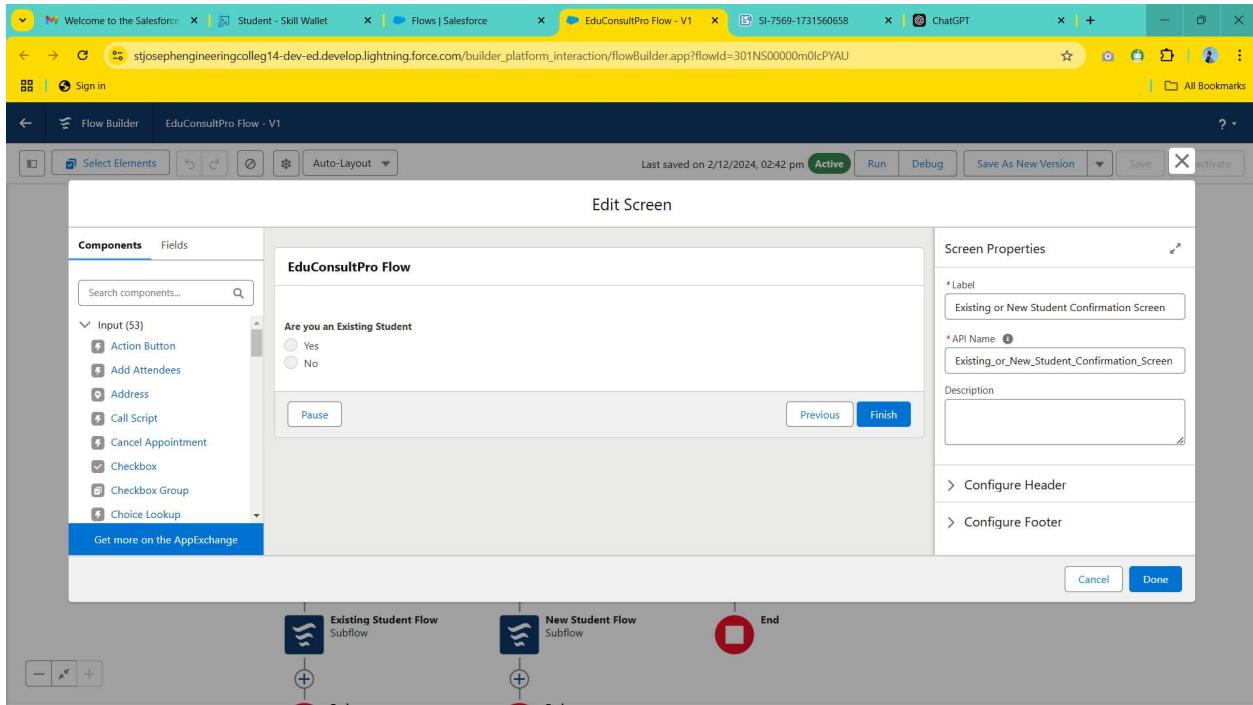


Create a ScreenFlow to Combine all the flows at one place

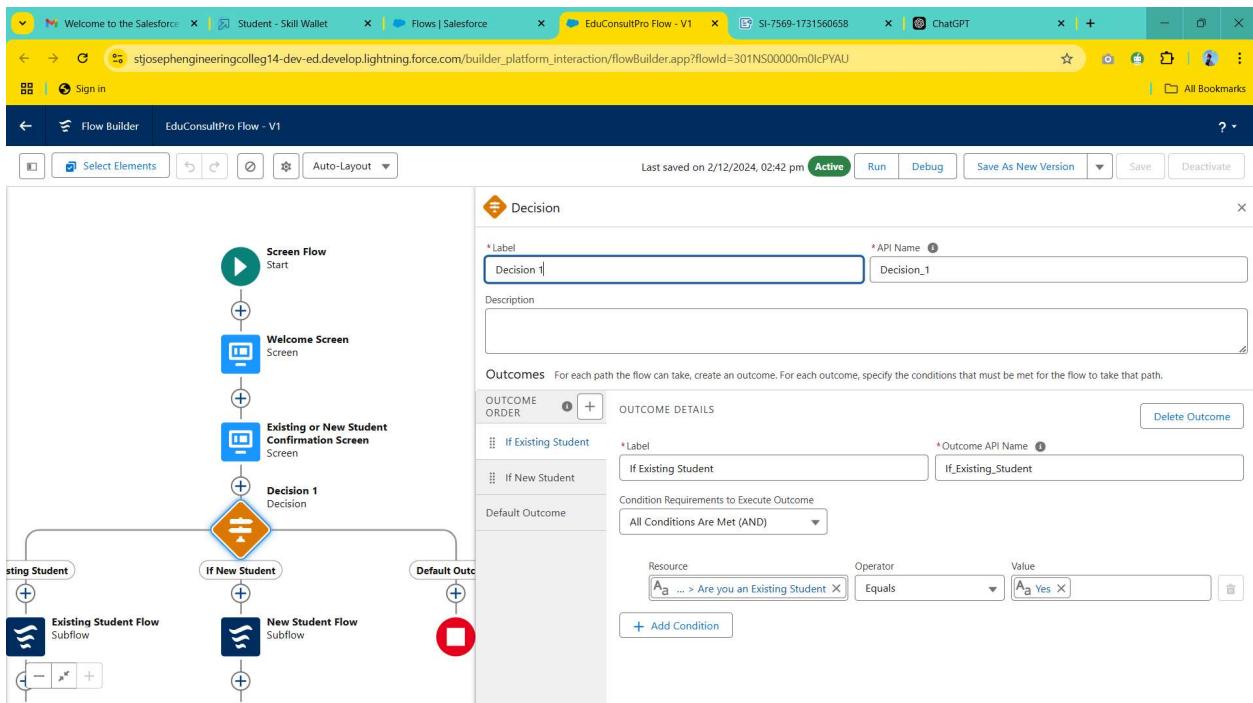
Add a Welcome screen element



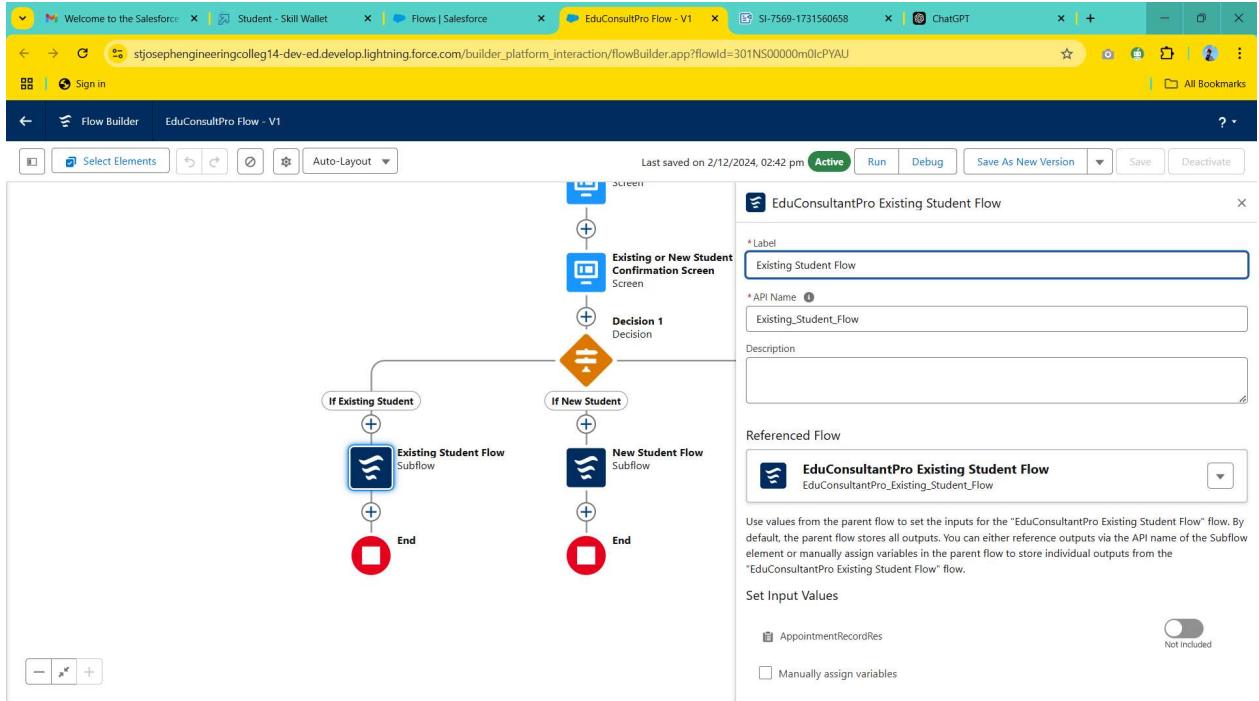
Add a screen element to ask whether he is new student or old student



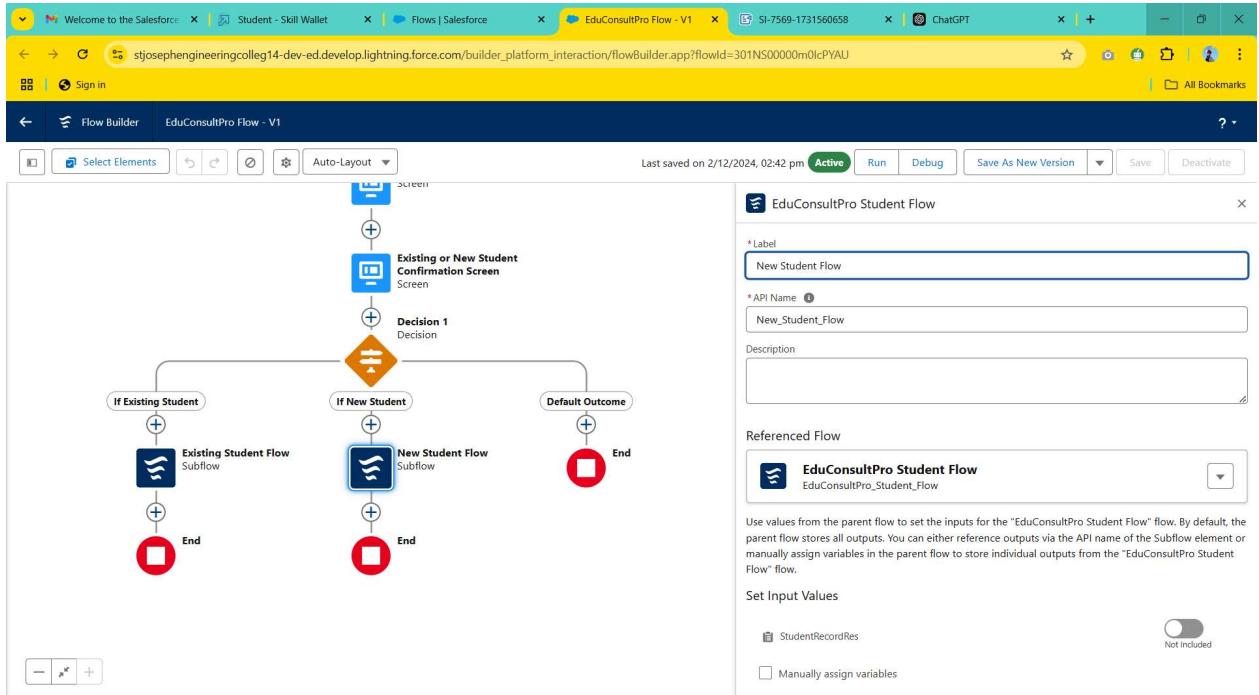
Add decision element

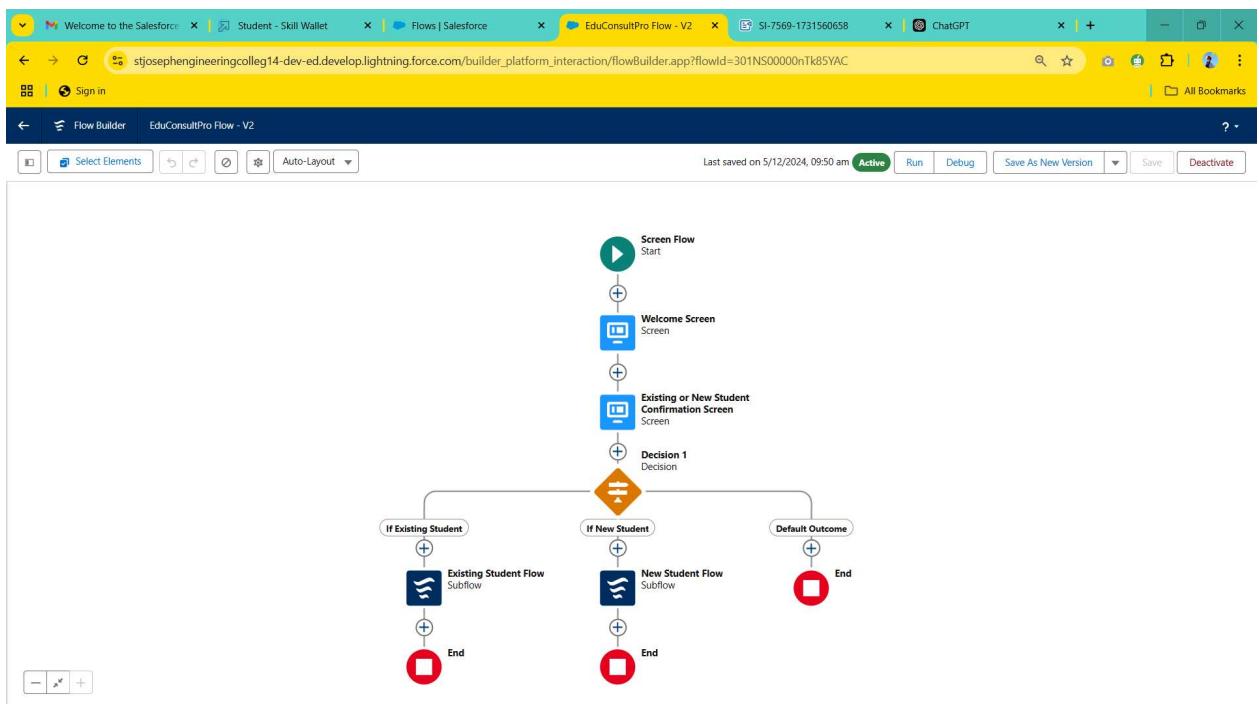


Add a subflow if it is a existing student

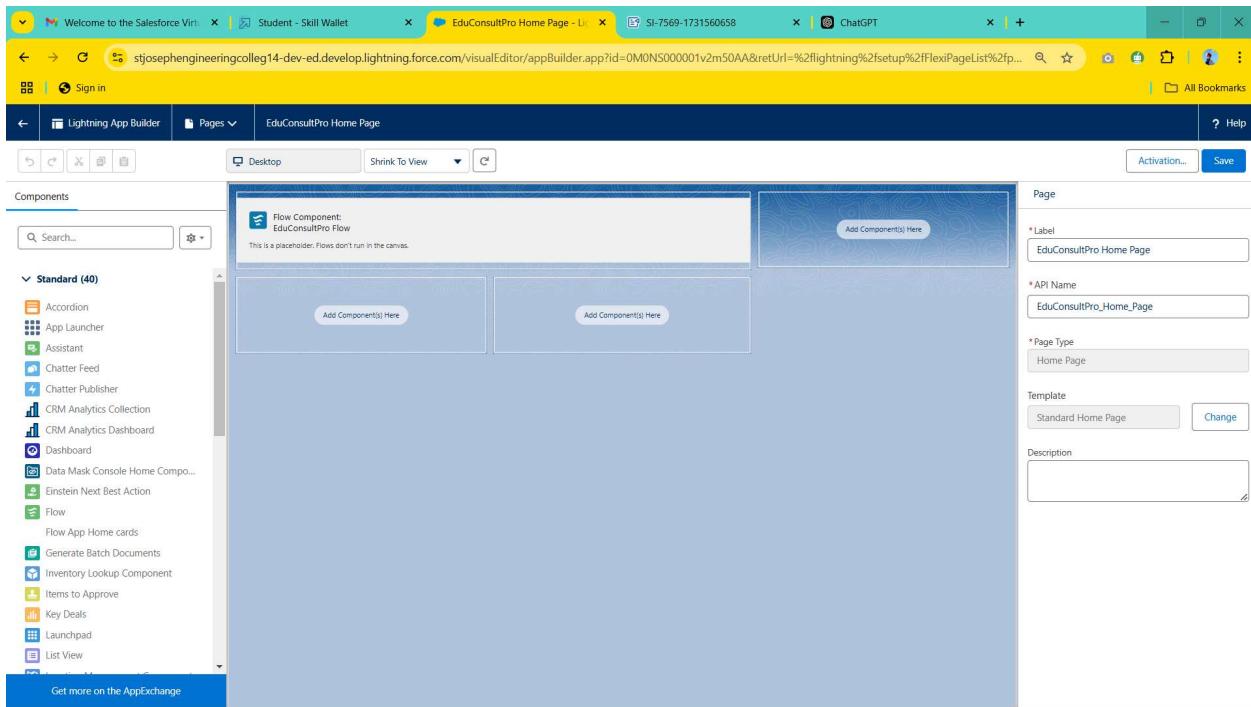


Add a subflow if it is new student





Create a lightning app page



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.