

A CRM Application To Manage The Services Offered By An Institution

BY

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Project Abstract

EduConsultPro Institute, a prominent educational institution known for its wide range of courses and programs across various fields, is experiencing significant growth in the number of prospective students seeking admission. This increase has highlighted several challenges in managing the admission process, student inquiries, and consulting services efficiently. The current manual processes are time-consuming, prone to errors, and lead to delays, causing frustration for both students and staff. To address these challenges and streamline operations, EduConsultPro Institute has decided to implement Salesforce CRM. The comprehensive project will focus on automating the admission application process, implementing an approval workflow for consulting requests, managing consulting services and appointments, and tracking immigration cases. By leveraging the robust capabilities of Salesforce CRM, EduConsultPro Institute aims to significantly enhance the experience for prospective students and improve operational efficiency for admissions staff.

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1. Requirements

1. Admission Application Management

Proactive students can access the admission application form on the institute's website or portal. This form collects detailed information such as personal details, academic history, and qualifications. Once submitted, the applications are stored in Salesforce CRM. Students receive automated email notifications confirming their submission. Admissions staff can use Salesforce to generate reports and dashboards to analyze metrics like application volume, acceptance rates, and enrollment trends.

2. Approval Process for Consulting Requests

In Salesforce, establish an approval process to review and approve consulting requests. Configure email alerts to inform relevant students whether their requests have been approved or rejected. Ensure that each consulting request is automatically submitted upon creation.

3. Consulting Services Management

Prospective students should have the ability to request consulting services via the institute's website or portal. The consulting request form needs to capture essential student details, their consulting preferences, and the required areas of expertise. Once submitted, these consulting requests should be recorded in the Salesforce CRM system. Automated email notifications should be sent to consultants and advisors for new consulting requests. Within the Salesforce CRM interface, consultants should be able to view, accept, and manage these requests. Scheduling of consulting appointments, including specifying the date, time, and purpose, should be facilitated through Salesforce. Additionally, the status of each appointment (such as scheduled, completed, or canceled) should be tracked and updated in Salesforce.

4. Immigration Case Management

Students should have the capability to initiate immigration cases via phone, email, or the web. The immigration case submission form must capture all relevant case details and necessary information. Once submitted, these immigration cases should be recorded and stored in the Salesforce CRM system. Automated email notifications should be sent to immigration agents and case managers for new cases. Immigration agents should be able to view, process, and monitor these cases within the Salesforce CRM interface. The status of each case (such as open, in progress, or closed) should be tracked and updated within Salesforce. Additionally, document management and collaboration tools should be integrated

to streamline case processing.

2. Creating Objects from Spreadsheets

In Salesforce, objects function as database tables designed to store data relevant to your organization. Each object consists of records (which are similar to rows) and fields (which are akin to columns), providing an organized structure for your data. These objects are essential for managing and interlinking different types of information, facilitating efficient data tracking, reporting, and analysis within the Salesforce environment.

To create objects from spreadsheets in Salesforce, follow these steps:

- 1. Prepare Your Spreadsheet:** Ensure your spreadsheet data is clean and well-organized. Each column should correspond to a field in Salesforce, and each row should represent a record.
- 2. Save the Spreadsheet:** Save your spreadsheet in a compatible format, typically CSV (Comma Separated Values).
- 3. Log in to Salesforce:** Access Salesforce and navigate to the setup menu.
- 4. Use the Data Import Wizard:** In the setup menu, find the Data Import Wizard. Select the standard or custom object you want to create records for.
- 5. Upload Your Spreadsheet:** Follow the wizard to upload your CSV file. Map the spreadsheet columns to Salesforce fields.
- 6. Start the Import:** Review the mappings, and start the import process. Salesforce will create records based on your spreadsheet data, allowing you to manage and analyze it within the platform.

Course Object:

The Course object plays a crucial role in our CRM application, tailored to manage the services provided by an institution. It enables us to capture comprehensive details about each course, such as its description, duration, and linked instructors. By establishing a well-organized and centralized database for all course-related information, we can effectively monitor, manage, and evaluate the educational services offered. This improves our capability to deliver customized experiences to students and optimize administrative workflows.

SETUP > OBJECT MANAGER

Course

Details

Fields & Relationships

9 Items. Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course	Name	Text(80)		✓
Course Name	Course_Name__c	Text(255)		
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:

The Consultant object is a vital component of our CRM application, developed to oversee the services provided by an institution. It enables us to store comprehensive details about each consultant, including their areas of expertise, availability, and the courses they are assigned to.

SETUP > OBJECT MANAGER

Consultant

Details

Fields & Relationships

10 Items. Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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:

The Student object is a key element of our CRM application, designed to manage the services offered by an institution. It enables us to store detailed information about each student, such as enrollment details, contact information, and course registrations. By keeping a well-structured repository of student data, we can effectively monitor student progress and tailor our communication to their needs.

Student					
15 Items, Sorted by Field Label					
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)			
Last Modified By	LastModifiedById	Lookup(User)			
Last Name	Last_Name__c	Text(255)			
Owner	OwnerId	Lookup(User,Group)		✓	

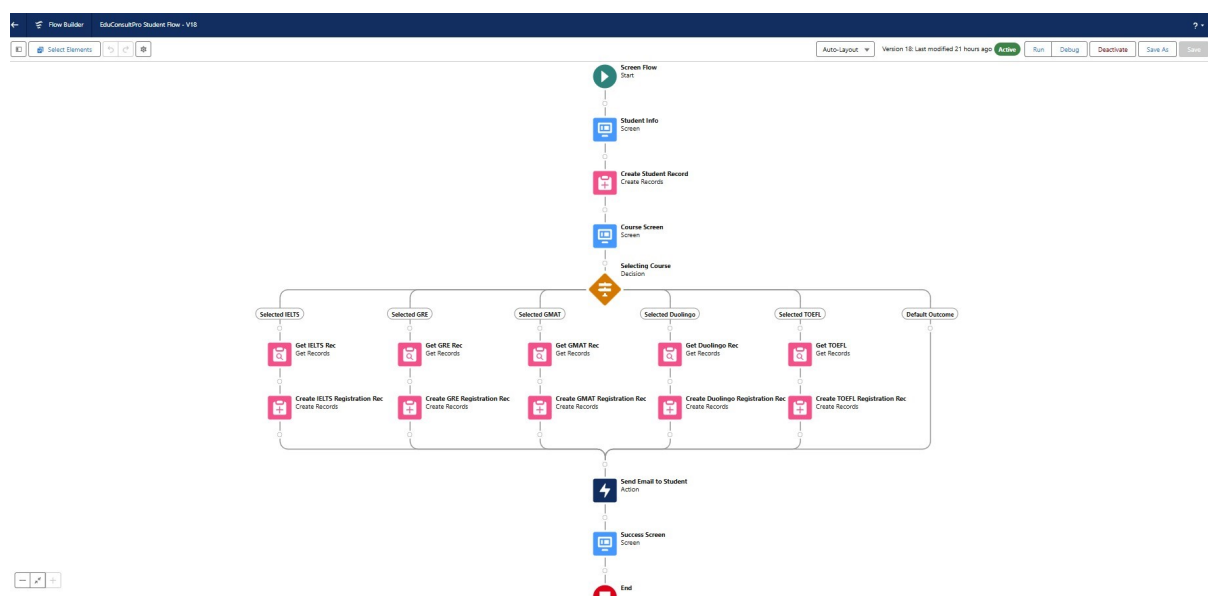
Appointment Object:

The Appointment object is integral to our CRM application designed to manage the services offered by an institution. It enables us to store detailed information about each appointment, including dates, times, participants, and purposes. By organizing and centralizing appointment data, we can efficiently schedule and track meetings, ensure timely follow-ups, and optimize resource allocation. This enhances our ability to provide timely and effective services.

Appointment					
11 Items, Sorted by Field Label					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Appointment	Name	Text(80)		✓	
Appointment Date/Time	Appointment_DateTime__c	Date/Time			
Appointment No	Appointment_No__c	Auto Number			
Consultant	Consultant__c	Lookup(Consultant)		✓	
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Notes	Notes__c	Long Text Area(131072)			
Owner	OwnerId	Lookup(User,Group)		✓	
Purpose/Topic	PurposeTopic__c	Text(255)			
Status	Status__c	Picklist			

3. Creating a ScreenFlow for Student Admission Application Process

The ScreenFlow for the Student Admission Application Process is a powerful feature in your CRM application designed to manage an institution's services. It optimizes the entire admission process by automating data collection, course selection, and record creation. This automation minimizes manual data entry errors, saves time, and ensures a uniform process for all applicants. Additionally, it provides instant feedback and communication with prospective students, enhancing their overall experience. By centralizing and organizing data, the institution can more effectively manage student information, monitor admissions, and offer customized educational services. This results in improved operational efficiency and superior service delivery.



Start the Flow: Begin by creating a new Screen Flow in Salesforce Flow Builder. This will be the starting point of the admission process.

a. **Student Info Screen**

- Drag a "Screen" element onto the canvas and name it "Student Info."
- Add fields to collect student information, such as:
 - Text fields for Name, Email, Phone Number.
 - Picklist for Gender.
 - Date field for Date of Birth.
- Configure the screen fields as required.
- Click "Done."

b. **Create Student Record**

- Drag a "Create Records" element onto the canvas and name it "Create StudentRecord."

- ii. Set "How Many Records to Create" to "One."
 - iii. Set "How to Set the Record Fields" to "Use separate resources, and literal values."
 - iv. Select the "Student" object.
 - v. Map the screen input fields to the corresponding Student object fields.
 - vi. Click "Done."
- c. **Course Screen**
- i. Drag another "Screen" element onto the canvas and name it "Course Screen."
 - ii. Add a picklist field for courseselection with optionslike IELTS, GRE, GMAT,Duolingo, and TOEFL.
 - iii. Configure the screen field as required.
 - iv. Click "Done."
- d. **Selecting Course Decision**
- i. Drag a "Decision" element onto the canvas and name it "Selecting Course."
 - ii. Create decision outcomes based on the selected course:
 - 1. "Selected IELTS"
 - 2. "Selected GRE"
 - 3. "Selected GMAT"
 - 4. "Selected Duo lingo"
 - 5. "Selected TOEFL"
 - iii. Configure the decision criteria for each outcome based on the selected coursepicklist value.
 - iv. Click "Done."
- e. **Course-Specific Records**
- i. For each possible course, follow these steps:
- f. **IELTS:**
- i. Drag a "Get Records" element onto the canvas under the "Selected IELTS" pathand name it "Get IELTS Rec."
 - ii. Select the IELTS object and set criteria to fetch relevantrecords.
 - iii. Click "Done."
 - iv. Drag a "Create Records" element onto the canvas and name it "Create IELTSRegistration Rec."
 - v. Set "How Many Records to Create" to "One."
 - vi. Select the IELTS Registration object.

- vii. Map the necessary fields and use the fetched records.
 - viii. Click "Done."
- g. **GRE:**
 - i. Repeat the steps similar to IELTS but for GRE:
 - ii. Name the elements "Get GRE Rec" and "Create GRE Registration Rec."
 - iii. Select the GRE and GRE Registration objects.
- h. **GMAT:**
 - i. Repeat the steps similar to IELTS but for GMAT
 - ii. Name the elements "Get GMAT Rec" and "Create GMAT Registration Rec."
 - iii. Select the GMAT and GMAT Registration objects.
- i. **Duolingo:**
 - i. Repeat the steps similar to IELTS but for Duo lingo:
 - ii. Name the elements "Get Duo lingo Rec" and "Create Duo lingo Registration Rec."
 - iii. Select the Duolingo and Duo lingo Registration objects.
- j. **TOEFL:**
 - i. Repeat the steps similar to IELTS but for TOEFL:
 - ii. Name the elements "Get TOEFL Rec" and "Create TOEFL Registration Rec."
 - iii. Select the TOEFL and TOEFL Registration objects.
- k. **Send Confirmation Email**
 - i. Drag an "Action" element onto the canvas and name it "Send Email to Student."
 - ii. Select "Send Email" as the action type.
 - iii. Configure the email template, recipient address (use the email collected from the student), and any other necessary details.
 - iv. Click "Done."
- l. **Success Screen**

- i. Drag a final "Screen" element onto the canvas and name it "Success Screen."
- ii. Add a display text component to inform the student that their registration has been successful.
- iii. Click "Done."

Connecting the Elements

- Connect the elements in the order described:
 - a. Start → Student Info → Create Student Record → Course Screen → Selecting Course.
 - b. From the "Selecting Course" decision, branch to each specific course path (IELTS, GRE, GMAT, Duolingo, TOEFL).
 - c. Each course path will then connect to the "Send Email to Student" action.
 - d. Finally, connect the "Send Email to Student" action to the "Success Screen."

4. Creating Users and Configuring User Settings in Salesforce

In a CRM application for managing services offered by an institution, creating and configuring user settings is a crucial task to ensure that all users have the appropriate access and capabilities to perform their roles effectively. Below are the detailed steps to create users and configure their settings in Salesforce.

The screenshot shows the Salesforce 'User Edit' page for a user named 'alia Consultant'. The page is divided into several sections: 'General Information', 'Permissions', and 'Mailing Address'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Permissions' section includes fields for Role, User License, Profile, and various checkboxes for permissions and settings. The 'Mailing Address' section includes fields for Address, City, State, and Zip. The 'Role' is set to 'Chong Specialist' and 'User License' is 'Salesforce Platform'. The 'Email' field is highlighted in red, indicating a required field.

Steps to Create Users

1. Navigate to Users

- InSalesforce, go to the Setup menu by clicking on the gear icon in the top-rightcorner.
- Inthe left-hand sidebar, under "Administer," expand the "Manage Users" sectionand click on "Users."

2. Create New User

- Click on the "New User" button at the top of the user list.
- Fill in the user details:

FirstName and Last Name: Enter the user's first and last name.

Alias: This is typically a short name for the user.

Email: Enter the user's email address.

Username: Enter a unique username in the format of an emailaddress.

Nickname: Enter a nickname if desired.

Role: Select the user's role from the dropdown menu.

User License:Choose the appropriate license for the user,"Salesforce Platform."

Profile: Select the profile that matches the user's job functions and permissions, like "Standard Platform User" or "System Administrator."

- c. Additional settings include options like Marketing User, Offline User, Knowledge User, etc., which can be checked based on the user's needs.

3. Set User Preferences

- a. Configure user-specific settings such as:

Email Encoding: Choose the appropriate email encoding format.

Locale, Time Zone, and Language: Set these according to the user's location.

Accessibility Mode: Enable this if the user requires enhanced accessibility.

4. Save the User

- a. Once all the necessary information and preferences are entered, click "Save" or "Save & New" to create the user and immediately proceed to create another one.

Configuring User Settings:

1. Edit User Details

To modify an existing user's details.

Update the necessary fields and settings as described above.

2. Assign Permission Set

Permission sets grant additional permissions beyond those defined by the user. Navigate to "Permission Sets" in the Setup menu.

Assign the relevant permission sets to the user.

3. Profile and Role Adjustments

Profiles control what users can see and do in Salesforce.

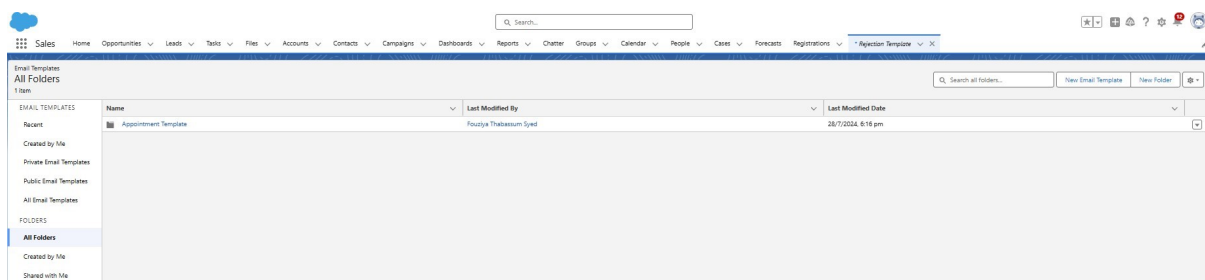
Roles control the level of access users have to data based on the organization. Adjust these settings as needed to ensure users have the appropriate access.

5.Approval Process for Appointment Object

In this project, we have implemented a structured approach to creating and managing email templates in Salesforce. First, we enabled Lightning Email Templates by navigating to Setup, using the Quick Find box to locate "Templates," and toggling on the Lightning Email Templates option.

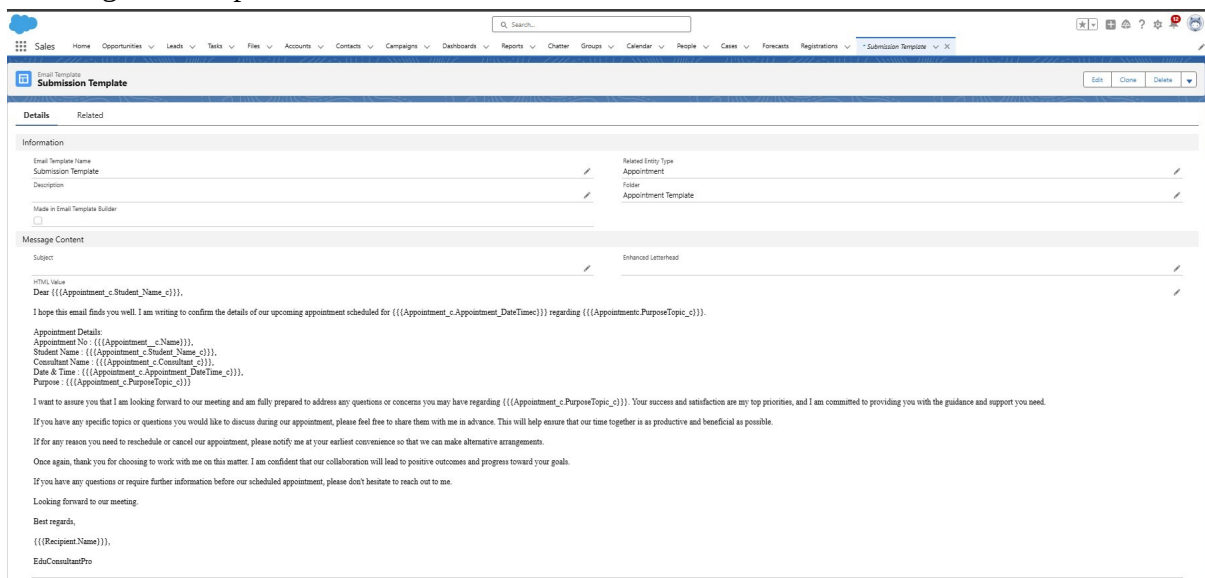
Creating the Appointment TemplateFolder

we created a dedicated folder named "Appointment Template" in the Email Templates sectionaccessed via the App Launcher. Its role in centralizing and managing these templates ensures that our appointment scheduling process is streamlined and professional, ultimately contributing tothe overall success of our project.



Creating the Submission Template

we created a dedicated folder named "Appointment Template" in the Email Templates sectionaccessed via the App Launcher. Within this Appointment Template folder, we developed a new email templatetitled "Submission Template," ensuring to input relevant detailssuch as the template name, description, and subject. The HTML content for this template was meticulously crafted to provide a clear and professional confirmation message for recipients.



Creating the Approval Template

The Approval Template is a crucial component of our project, facilitating clear and efficient communication regarding appointment approvals. The Approval Template is a vital tool for maintaining clear, professional, and effective communication with students regarding appointment approvals. It enhances the overall efficiency of our appointment scheduling process and contributes to the success of our project by ensuring that all parties are well-informed and prepared for their meetings.

Approval Template

Details **Related**

Information

Email Template Name: Approval Template

Description:

Made in Email Template Builder: ☐

Related Entity Type: Appointment

Folder: Appointment Template

Message Content

Subject: Approval Request

Enhanced Leterhead:

Dear {{{Appointment_c_Student_Name_c}}},

I hope this email finds you well. I am pleased to inform you that your request for an appointment scheduled for {{{Appointment_c_Appointment_DateTime_c}}} regarding {{{Appointment_c_PurposeTopic_c}}} has been approved.

Appointment Details:

Appointment No.: {{{Appointment_c_Name_c}}}

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_c}}},

EduConsultantPro

To Do List

Creating the Rejection Template

The Rejection Template is an essential component of our project, designed to handle situations where appointment requests cannot be approved. The Rejection Template is a crucial tool for managing situations where appointment requests cannot be approved. It ensures clear, professional, and compassionate communication with students, encourages proactive problem-solving, and maintains positive relationships by demonstrating support and understanding.

Rejection Template

Details **Related**

Information

Email Template Name: Rejection Template

Description:

Made in Email Template Builder: ☐

Related Entity Type: Appointment

Folder: Appointment Template

Message Content

Subject: Request Rejection

Enhanced Leterhead:

Dear {{{Appointment_c_Student_Name_c}}},

I hope this email finds you well. I am pleased to inform you that your request for an appointment scheduled for {{{Appointment_c_Appointment_DateTime_c}}} regarding {{{Appointment_c_PurposeTopic_c}}} has been approved.

Appointment Details:

Appointment No.: {{{Appointment_c_Name_c}}}

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. **Email Preview** - 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_c}}},

EduConsultantPro

To Do List

Creating an Approval Process:

The "Appointment Approval" process was implemented to ensure a streamlined and secure workflow for managing appointment requests. This approval process enforces strict control over appointment data, allowing only designated managers to approve or reject submissions. By locking records upon submission, it prevents unauthorized changes and ensures data integrity throughout the approval cycle. Automated email alerts are integrated to keep all relevant parties informed at each stage, enhancing communication and efficiency. This structured approach ensures that appointments are reviewed and approved in a consistent manner, aligning with organizational policies and maintaining high standards of data accuracy and accountability. The implementation of this process ultimately leads to improved operational efficiency and better resource management.

The screenshot displays the 'Appointment Approval' process definition within a system interface. The interface includes a top navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A left sidebar contains a search bar and a navigation menu with options like 'Data', 'Mass Transfer', 'Approval Requests', 'Process Automation', and 'Approval Processes'. The main content area is titled 'Approval Processes' and shows the details for the 'Appointment Approval' process.

Process Definition Detail

Process Name	Appointment Approval	Active
Unique Name	Appointment_Approval	Need automated approval Determined By: Manager of Record Submitter
Description		
Entry Criteria		
Record Lockability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests
Approval Assignment Email Template	Appointment Owner	
Created By	Erinika Thabaneum-Singh	Modified By: Erinika Thabaneum-Singh
Created On	28/07/2024 9:41 pm	Modified On: 28/07/2024 6:55 pm

Initial Submission Actions

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

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Step 1	1	Step 1			Manager	Final Rejection

Final Approval Actions

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

Final Rejection Actions

Action	Type	Description
Record Lock	Record Lock	Unlock the record for editing
Field Update	Field Update	Final Rejection Email Alert
Email Alert	Email Alert	Final Rejection Update

Recall Actions

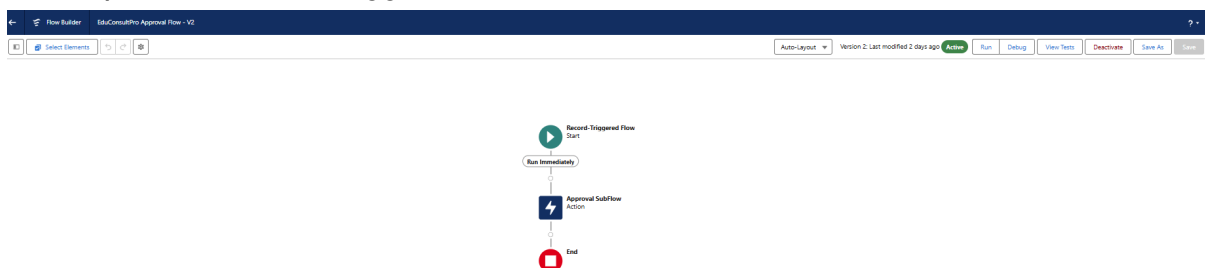
Action	Type	Description
Record Lock	Record Lock	Unlock the record for editing

6. Creating a Record triggered flow

The "EduConsultPro Approval Flow - V2" is a Record-Triggered Flow designed to automate the approval process for appointment requests within the EduConsultPro system. This flow is triggered immediately upon the creation or update of a record, ensuring that the approval process begins without delay.

Flow Structure:

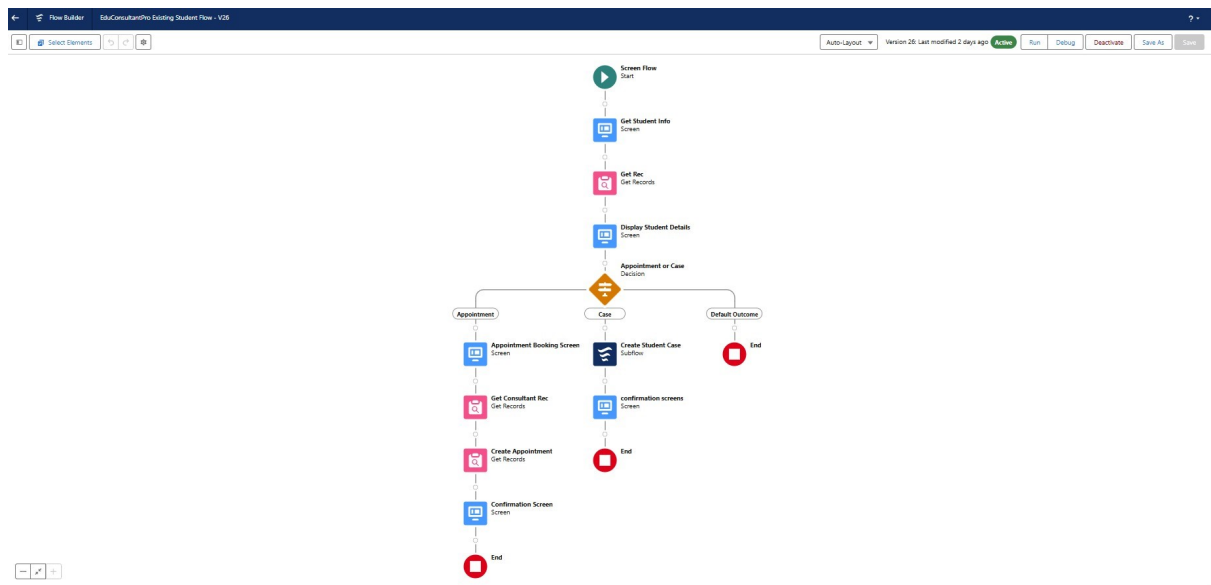
1. **Record-Triggered Flow (Start):** This element initiates the flow as soon as a specified record event occurs, such as the creation or update of an appointment request. The immediate execution ensures that the approval process is triggered in real-time, maintaining the efficiency and responsiveness of the system.
2. **Approval SubFlow (Action):** This component of the flow invokes a subflow dedicated to handling the approval logic. The subflow encapsulates the necessary actions and decisions required to process the approval, ensuring modularity and reusability of the approval logic. By separating the approval logic into a subflow, it becomes easier to maintain and update without impacting the overall flow structure.
3. **End:** The flow concludes after executing the necessary actions within the approval subflow. This signifies the completion of the automated approval process for the triggered record.



The "EduConsultPro Approval Flow" is a critical component in automating and optimizing the appointment approval process within the EduConsultPro system. Its implementation ensures efficient, consistent, and real-time processing of appointment requests, ultimately contributing to improved operational performance and resource management.

7.ScreenFlow for ExistingStudent to Book an Appointment

This ScreenFlow facilitates the process for existing students to book appointments or create cases within an educational consultancy system. The flow initiates by retrieving and displaying student information, then directs the student based on their choice of booking an appointment or creating a case.



Screen Flow Start: This marks the beginning of the flow.

Get Student Info Screen: The flow presents a screen to gather necessary information from the student, such as student ID or other identifying details.

Get Records: The flow retrieves the student's records from the database using the information provided in the previous step.

Display Student Details Screen: The retrieved student details are displayed to the student for verification purposes.

Appointment or Case Decision: The flow presents a decision point where the student can choose to either book an appointment or create a case.

Appointment Path:

Appointment Booking Screen: If the student opts to book an appointment, they are directed to a screen to select the appointment details such as date, time, and purpose.

Get Consultant Records: The flow retrieves records of available consultants for the student to choose from.

Create Appointment Records: the flow creates an appointment record in the database.

Confirmation Screen: The flow displays a confirmation screen confirming that the appointment has been successfully booked.

End : This step marks the end of the flow for the appointment booking path.

Case Path:

Create Student Case Subflow: If the student opts to create a case, a subflow is initiated to handle the case creation process, which may include collecting additional information and documenting the case.

Confirmation Screen: The flow displays a confirmation screen confirming that the case has been successfully created.

End : This step marks the end of the flow for the case creation path.

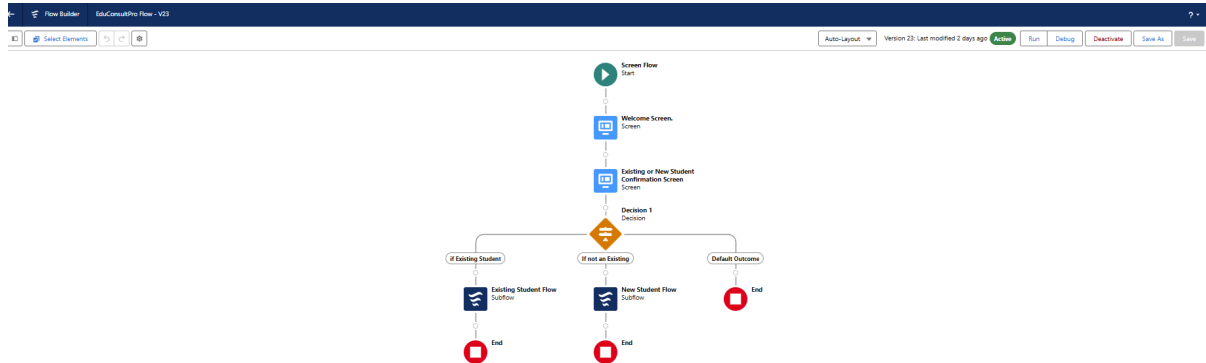
Default Outcome Path:

End : If neither an appointment nor a case is chosen, the flow reaches the default outcome, effectively ending the flow.

Implementing this flow improves the overall management of student appointments and cases, ensuring a seamless and efficient process for both students and the educational consultancy.

8. Combining All Flows into a Single Flow

This combined ScreenFlow integrates the processes for managing both existing and new students within an educational consultancy system. It starts by welcoming the user and then directs them based on whether they are an existing student or a new student. This approach ensures a seamless and unified experience for all students.



Steps to Create the Combined Flow:

Screen Flow Start : This marks the beginning of the combined flow.

Welcome Screen : A welcome screen is presented to the user, providing an introduction and necessary information.

Existing or New Student Confirmation Screen : The flow presents a screen where the user can confirm whether they are an existing student or a new student.

Decision Point (Decision 1) : A decision point is introduced to direct the user based on their selection from the previous step.

- ➡ **If Existing Student:** The user is directed to the Existing Student Flow subflow.
- ➡ **If Not an Existing Student:** The user is directed to the New Student Flow subflow.
- ➡ **Default Outcome :** If no selection is made, the flow reaches the default outcome.

Existing Student Flow Subflow: This subflow handles the process for existing students, guiding them through necessary steps such as booking an appointment or creating a case.

New Student Flow Subflow : This subflow handles the process for new students, guiding them through necessary steps such as registration and initial consultations.

End : Each subflow and the main flow conclude with an end step, marking the completion of the process.

9. Creating a Lightning App Page

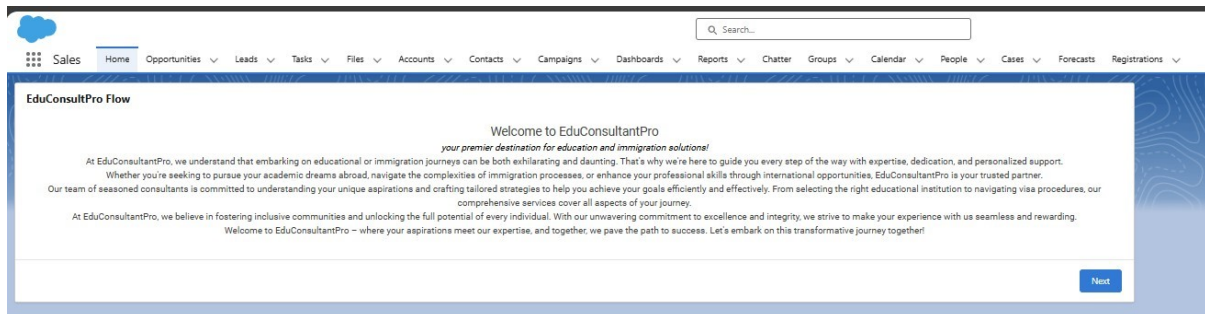
To create a customized home page in Salesforce for your project, start by navigating to the Lightning App Builder through Setup. Enter "App Builder" in the Quick Find box, and click on "Lightning App Builder." Begin the process by clicking "New" and selecting "Home Page," then proceed by naming the page "EduConsultPro Home Page." Choose the Standard Home Page template and finalize this step by clicking "Done."

Next, drag the Flow component into the top-right region of the page. Search for the specific flow named "EduConsultantPro Flow" and save your changes. To make this page functional and accessible, click "Activate," and assign it to the appropriate apps and profiles. Choose the Sales app, then assign it to the "System Administrator" profile. After reviewing your selections, click "Save" to complete the setup.

This process is essential for your project as it customizes the user interface, integrates key components like the "EduConsultantPro Flow," and ensures that the relevant stakeholders, such as system administrators, have streamlined access to vital functionalities within the CRM. This setup enhances the overall efficiency and user experience of the EduConsultPro application.

Output:

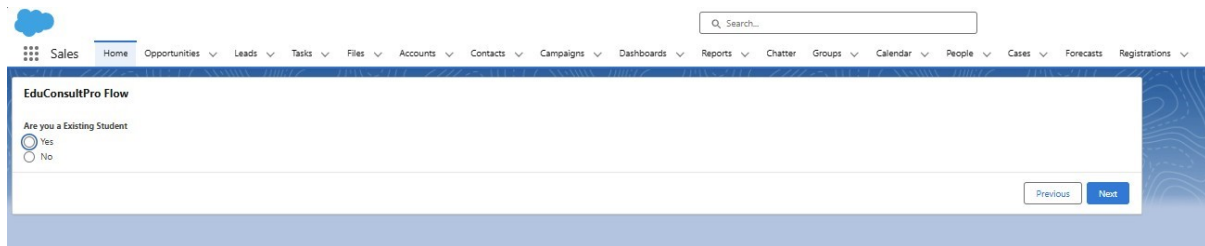
EduConsultPro CRM - WelcomePage :



The screenshot displays the initial page of your CRM application, specifically designed to manage the services offered by an institution. The page, titled "EduConsultPro Flow," serves as a welcoming interface for users accessing the system. The central portion of the page is dedicated to an introduction under the heading "Welcome to EduConsultPro," highlighting the application's purpose. It outlines the key services provided by EduConsultPro, emphasizing its role in guiding users through educational and immigration processes with expertise and personalized support. At the bottom right, a "Next" button is visible, likely designed to guide users through subsequent steps or

processes within the application.

EduConsultPro CRM - StudentStatus Confirmation:



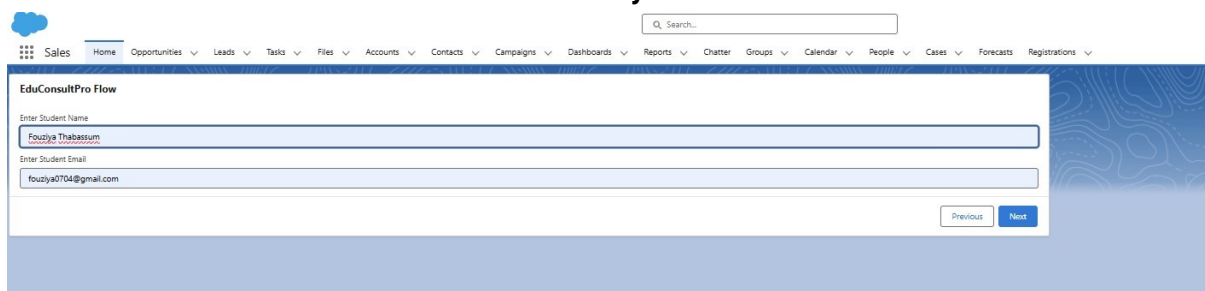
The second page of your CRM application, as shown in the screenshot, continues within the "EduConsultPro Flow" and presents the user with a simple but essential question: "Are you an Existing Student?" This step is likely part of a process to customize the user experience based on their status.

Two radio button options are provided:

- **Yes:** The user selects this if they are already enrolled or registered within the institution.
- **No:** The user selects this if they are a new or prospective student.

There are navigation buttons, "Previous" and "Next," allowing the user to either go back to the previous step or proceed to the next stage of the process. This page helps in identifying the user's current relationship with the institution, which is crucial for guiding them through the appropriate workflow, whether that involves updating existing records or creating new ones.

EduConsultPro CRM - StudentInformation Entry:



This page appears after the user has selected "Yes" to indicate that they are an existing student.

Enter Student Name: The user is required to input their full name.

Enter Student Email: The user must provide their email address.

These inputs are crucial for identifying the student in the system, allowing the application to retrieve or update the corresponding records accurately. Once the details are entered, the user can navigate forward by clicking the "Next" button or go back to the previous

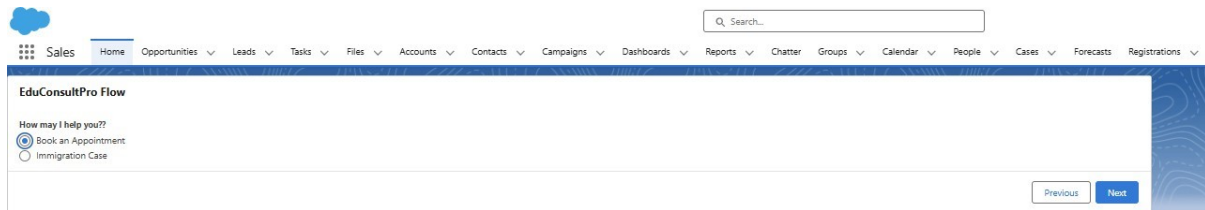
screen using the "Previous" button.

Service Selection: The user is prompted with the question, "How may I help you?" followed by two options:

Book an Appointment: Likely directs the user to schedule a meeting or consultation.

Immigration Case: Possibly leads to initiating or managing an immigration-related service

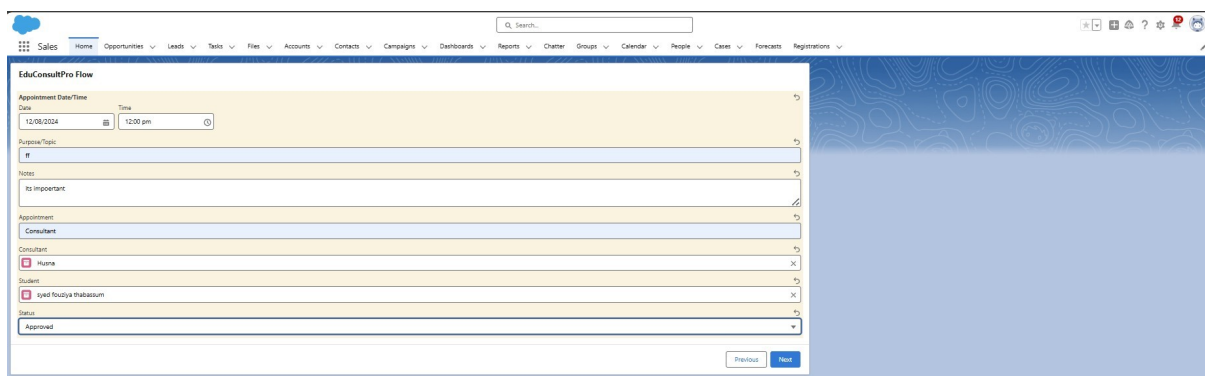
Appointment Booking Selection for Existing Student



The screenshot shows the 'EduConsultPro Flow' interface. At the top, there's a navigation bar with various tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and Registrations. Below the navigation bar, the main content area displays the question 'How may I help you?' with two radio button options: 'Book an Appointment' (which is selected) and 'Immigration Case'. At the bottom right of the main content area, there are two buttons: 'Previous' and 'Next'.

In this EduConsultPro Flow screen, an existing student is presented with two service options: "Book an Appointment" or "Immigration Case." The question "How may I help you?" guides the student to select the service they need. In this scenario, the student has chosen the "Book an Appointment" option, indicating their desire to schedule a consultation or meeting, likely with a consultant or advisor. The student can then click "Next" to proceed with the appointment booking process or "Previous" to return to an earlier step. This screen is essential for directing the student to the appropriate service, ensuring that their specific needs are met efficiently.

EduConsultPro Flow - Service Selection:



The screenshot shows the 'EduConsultPro Flow' interface with the appointment booking details. The form includes the following fields: 'Appointment Date/Time' with sub-fields for 'Date' (12/08/2024) and 'Time' (12:00 pm); 'Purpose/Topic' with the value 'if'; 'Notes' with the value 'its important'; 'Appointment' with the value 'Consultant'; 'Consultant' with the value 'Home'; 'Student' with the value 'Tyed Roudya Prabakaran'; and 'Status' with the value 'Approved'. At the bottom right of the form, there are two buttons: 'Previous' and 'Next'.

In this screenshot from a CRM application, you are in the "EduConsultPro Flow," which appears to be a custom workflow or wizard designed to guide users through a series of steps to manage services offered by an institution. The interface is part of a Salesforce CRM, as indicated by the Salesforce branding and navigation bar at the top.

NewConsultant Creation in EduConsultPro Flow:

EduConsultPro Flow

Student Name	Harsha vardhan
First Name	harsha vardhan
Last Name	MASHETTI
Phone	6,30,22,98,013
Email	harshavardhanmashetti@gmail.com
Date of Birth	11/01/2004
Address	godugupally
City	siddipet
Gender	male
Qualification	btech
University Name	malla reddy university

In the above screenshot, you're continuing through the EduConsultPro Flow within the CRM application. Here, you seem to be at a step where the user needs to either select an existing consultant or create a new consultant entry. Behind the pop-up form, the initial flow screen is visible, where the user was attempting to schedule an appointment and had to select a consultant. The selection of "Consultant" in the "Appointment" field triggered this form because the intended consultant was not found in the system.

Student Name	Harsha Vardhan
First Name	harsha vardhan
Last Name	mashetti
phone	6302298013
email	harshavardhanmashetti@gmail.com
DOB	11/01/2004
Address	godugupally
City	Siddipet
Gender	Male
Qualification	B Tech
University Name	MALLA REDDY UNIVERSITY
Year of Passing	05/05/2025

Appointment Booking Confirmation for Existing User:

EduConsultPro Flow

Dear a05Qy0000098XhZIAU,

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.

[Previous](#)[Finish](#)

This final screen in the EduConsultPro Flow confirms the successful completion of the appointment booking process for an existing user. It displays a congratulatory message, welcoming the student to EduConsultPro and informing them that their registration on the platform has been successfully completed. The screen also mentions that the student's registration details have been sent via email, and they are encouraged to check their inbox. The user can either click "Previous" to review earlier steps or "Finish" to complete the process, marking the end of the appointment booking flow.

Immigration Case Selection for Existing Student:

EduConsultPro Flow

How may I help you??

☐ Book an Appointment

☒ Immigration Case

[Previous](#)[Next](#)

This screen is part of the EduConsultPro Flow and presents an option for an existing student to initiate or manage an immigration case. The user is asked, "How may I help you?" and can choose between "Book an Appointment" or "Immigration Case." In this scenario, the "Immigration Case" option is selected, which suggests that the student is interested in handling issues related to immigration, such as visa applications, renewals, or other related services.

Confirming Customer Information:

The screenshot shows a Salesforce flow interface titled "EduConsultPro Flow" with a sub-header "Confirm Customer Info". A message bubble from a representative named HARSHA VARDHAN asks the user to provide their first and last name. Below the message, there are two input fields: "First Name" containing "HARSHAVARDHAN" and "Last Name" containing "MASHETTI". At the bottom right, there are "Previous" and "Next" buttons.

The image shows the "Confirm Customer Info" screen in a Salesforce flow, part of an immigration case management process. In this step, the customer is asked to confirm their first and last name. The user is greeted by a representative, "HARSHA VARDHAN," and prompted to enter their first name (HARSHA VARDHAN) and last name (MASHETTI). Once the information is provided, the user can proceed by clicking the "Next" button at the bottom right corner of the screen.

Confirming Customer Contact Details:

The screenshot shows the next screen in the Salesforce flow, titled "EduConsultPro Flow" with a sub-header "Confirm Customer Details". A message bubble from the representative thanks the user and asks for their email address and phone number. Below the message, there are two input fields: "Email Address" containing "harshavardhanmashetti@gmail.com" and "Phone Number" containing "06302298013". At the bottom right, there are "Previous" and "Next" buttons.

The image depicts the next step in the immigration case management process within the Salesforce flow, labeled "Confirm Customer Details." In this step, after confirming their name, the customer is now asked to provide their contact information, specifically their email address and phone number. The email address field is filled in with harshavardhanmashetti@gmail.com and the phone number field is completed with "6302298013". The user can continue to the next step by clicking the "Next" button at the bottom right corner of the screen.

Gathering Case Details for Support:

The screenshot shows the 'Get Case Details' screen in the Salesforce flow. The header includes a search bar and a navigation menu with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and Registrations. The main content area is titled 'EduConsultPro Flow' and 'Get Case Details'. It features a text input field with the placeholder 'What can I help you with today?'. Below this are four form fields: 'Case Type' (selected as 'Mechanical'), 'Case Origin' (selected as 'Email'), 'Case Subject' (selected as 'Artificial intelligence'), and 'Case Details' (entered as 'Advanced'). At the bottom right, there are 'Previous' and 'Next' buttons.

This image shows the "Get Case Details" screen in the Salesforce flow, where the customer is asked to provide specific details about their case. This step is crucial for accurately addressing the customer's needs.

The customer is prompted to fill out the following fields:

1. **Case Type:** Selected as "Mechanical."
2. **Case Origin:** Set to "Email."
3. **Case Subject:** Entered as "Artificial intelligence."
4. **Case Details:** The customer has provided the text "Advanced" to describe the specifics of their inquiry.

Once these details are filled in, the user can proceed by clicking the "Next" button at the bottom right corner of the screen.

Immigration Case Status Update

The screenshot shows the 'Immigration Case Status Update' screen in the Salesforce flow. The header includes a search bar and a navigation menu with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and Registrations. The main content area is titled 'EduConsultPro Flow'. It features a message from the EduConsultPro team: 'Dear Student, We are pleased to update you on the status of your immigration case with EduConsultPro. Your case has been successfully processed. We are committed to providing you with timely updates and support throughout this process. Please check your email for detailed information about your case and next steps. Should you have any questions or need further assistance, do not hesitate to reach out to us. Thank you for entrusting us with your immigration journey. We are here to support you every step of the way. Best regards, The EduConsultPro Team'. At the bottom right, there are 'Previous' and 'Finish' buttons.

The communication ends with a thank you note from the EduConsultPro team, emphasizing their commitment to supporting the student throughout their immigration journey.

Non-Existing Student Selection:

The screenshot shows the top of a Salesforce page. At the top left is the Salesforce logo and a navigation bar with links: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and Registrations. A search bar is located at the top right. Below the navigation bar, the page title is 'EduConsultPro Flow'. The main content area contains a question: 'Are you a Existing Student'. There are two radio buttons: 'Yes' and 'No'. The 'No' button is selected. At the bottom right of the form, there are two buttons: 'Previous' and 'Next'.

If the user selects "No," the flow will likely proceed to collect information relevant to a new student, such as registration details, personal information, and academic background. The process may also include steps to set up a new student profile within the system, offer guidance on available services, or initiate a process for new student onboarding. The selection could trigger different actions or data collection steps within the flow, ensuring that the process is tailored to the needs of a new student rather than someone who already has an established profile within the system

Student Information Form:

The screenshot shows a Salesforce form titled 'EduConsultPro Flow'. The form contains the following fields: Student Name (Harsha vardhan), First Name (harsha vardhan), Last Name (MASHETTI), Phone (6,30,22,98,013), Email (harshavardhanmashetti@gmail.com), Date of Birth (11/01/2004), Address (godugupally), City (siddipet), Gender (male), Qualification (btech), and University Name (malla reddy university). Each field has a right arrow icon.

This is a Salesforce form used in an "EduConsultPro Flow" process. It's designed to capture and manage student information, such as personal details, educational background, and contact information. The form is typically used by educational consultancies or institutions to organize student data for processing applications, admissions, or other related services.

Course Selection:

The screenshot shows the 'Course Selection' step of the 'EduConsultPro Flow'. At the top, there is a navigation bar with a search box and a menu containing: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and Registrations. Below the navigation bar, the 'EduConsultPro Flow' title is displayed. The main content area features a 'Select Course' dropdown menu. The dropdown is open, showing a list of course options: --None--, IELTS, GRE, GMAT, Duolingo, and TOEFL. The 'GMAT' option is currently selected and highlighted.

This screenshot shows a dropdown menu in the "EduConsultPro Flow" where users can select a course from options like IELTS, GRE, GMAT, Duolingo, and TOEFL. This feature is used to specify the standardized test or course a student is interested in or applying for.

Registration Confirmation:

The screenshot displays the 'Registration Confirmation' step of the 'EduConsultPro Flow'. The navigation bar is identical to the previous step. The main content area shows a confirmation message addressed to 'Dear Junaidh'. The message reads: 'Congratulations and welcome to EduConsultPro! 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.' At the bottom right of the message area, there are two buttons: 'Previous' and 'Finish'.

This screenshot displays the final step in the "EduConsultPro Flow" process, where a registration confirmation message is shown. The message congratulates the user, Junaidh, on successfully completing the registration on the EduConsultPro platform. It informs him that he is now part of the community aimed at helping students achieve their educational and immigration goals. The message also mentions that the registration details have been sent via email and advises the user to check their inbox. The process concludes with options to navigate back or finish the flow.