

# CRM APPLICATION TO MANAGE THE SERVICES OFFERED BY AN INSTITUTION

1. Create a screenflow for student admission application process
2. Create users
3. Create an approval process
4. Create a record triggered flow
5. Create a screenflow for existing students
6. Create a lightning app page

## CREATE OBJECTS FROM SPREAD SHEET

In this step I created custom objects from the spreadsheet provided  
The first one being Course Object

Create a custom object from a spreadsheet

Define object and fields

Choose the data source, map fields and their types, and import field data.

Worksheet Details

Field Label Source

☐ Enter manually

☒ Detect from row

Field Labels Row

1

Import 5 rows of Data?

☐ No, skip import

☒ Yes, import data

Record Name Field

Let Salesforce Create a D

Fields 5 of 5 to import

☐ Hide mapped fields

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS	FIELD PREVIEW
✓ Course Name	Course Name	Text	<input checked="" type="checkbox"/>	IELTS
✓ Description	Description	Text	<input checked="" type="checkbox"/>	Let's Learn IELTS
✓ Start Date	Start Date	Phone	<input checked="" type="checkbox"/>	03-01-2024

Back

Next

Similarly we have created custom objects for Consultant, Student, Appointment

## For Consultant

Create a custom object from a spreadsheet

Define object and fields

Choose the data source, map fields and their types, and import field data.

Worksheet Details

Field Label Source  
☐ Enter manually  
☒ Detect from row

\* Field Labels Row  
1

Import 3 rows of Data? <sup>1</sup>  
☐ No, skip import  
☒ Yes, import data

Record Name Field <sup>1</sup>  
Let Salesforce Create a D. ▾

Fields 6 of 6 to import ☐ Hide mapped fields

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS <sup>1</sup>	FIELD PREVIEW
✓ Address	✕ Address	Text ▾	<input checked="" type="checkbox"/>	Street no 12, Banjara hills Colony, ...
✓ Email	✕ Email	Email ▾	<input checked="" type="checkbox"/>	phani@gmail.com
✓ Expertise	✕ Expertise	Text ▾	<input checked="" type="checkbox"/>	Immigration

## For Student

Create a custom object from a spreadsheet

Define object and fields

Choose the data source, map fields and their types, and import field data.

Worksheet Details

Field Label Source  
☐ Enter manually  
☒ Detect from row

\* Field Labels Row  
1

Import 2 rows of Data? <sup>1</sup>  
☐ No, skip import  
☒ Yes, import data

Record Name Field <sup>1</sup>  
Let Salesforce Create a D. ▾

Fields 12 of 12 to import ☐ Hide mapped fields

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS <sup>1</sup>	FIELD PREVIEW
✓ Student Name	✕ Student Name	Text ▾	<input checked="" type="checkbox"/>	Anjali Sharma
✓ First Name	✕ First Name	Text ▾	<input checked="" type="checkbox"/>	Anjali
✓ Last Name	✕ Last Name	Text ▾	<input checked="" type="checkbox"/>	Sharma

## For Appointment

Create a custom object from a spreadsheet

Define object and fields

Choose the data source, map fields and their types, and import field data.

Worksheet Details

Field Label Source  
☐ Enter manually  
☒ Detect from row

\* Field Labels Row  
1

Import 0 rows of Data?  
☐ No, skip import  
☒ Yes, import data

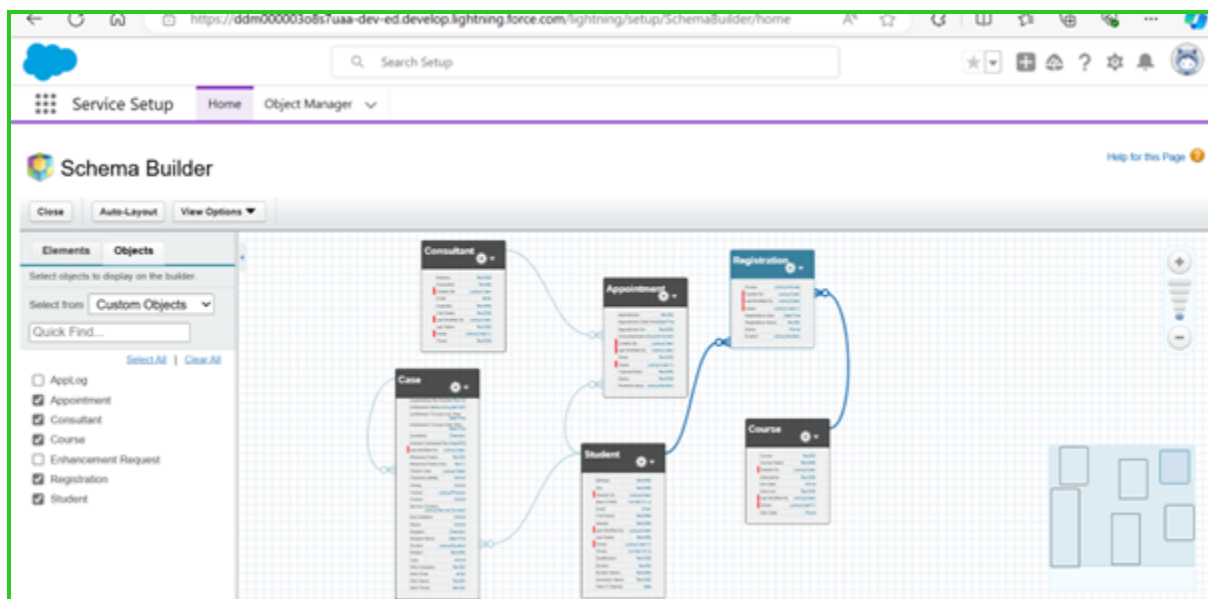
Record Name Field  
Let Salesforce Create a D...

Fields 5 of 5 to import ☐ Hide mapped fields

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS	FIELD PREVIEW
✓ Appointment Date/Time	Appointment Date/Time	Date/Time	<input checked="" type="checkbox"/>	
✓ Appointment No	Appointment No	Text	<input checked="" type="checkbox"/>	
✓ Notes	Notes	Text Area	<input checked="" type="checkbox"/>	

## Create Relationship

Here I have cretaed relationship between all the objects created in the above steps



Next we have configured all the objects

The screenshot shows the Salesforce Setup interface for the 'Registration' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Registration' and shows the 'Fields & Relationships' configuration. The 'Field Label' is 'Status'. The 'Values' section has two options: 'Use global picklist value set' (unchecked) and 'Enter values, with each value separated by a new line' (checked). Below this is a text area containing the values: 'Enrolled', 'Completed', and 'Dropped'. There are checkboxes for 'Display values alphabetically, not in the order entered' (unchecked), 'Use first value as default value' (unchecked), and 'Restrict picklist to the values defined in the value set' (checked). The 'Field Name' is 'Status'.

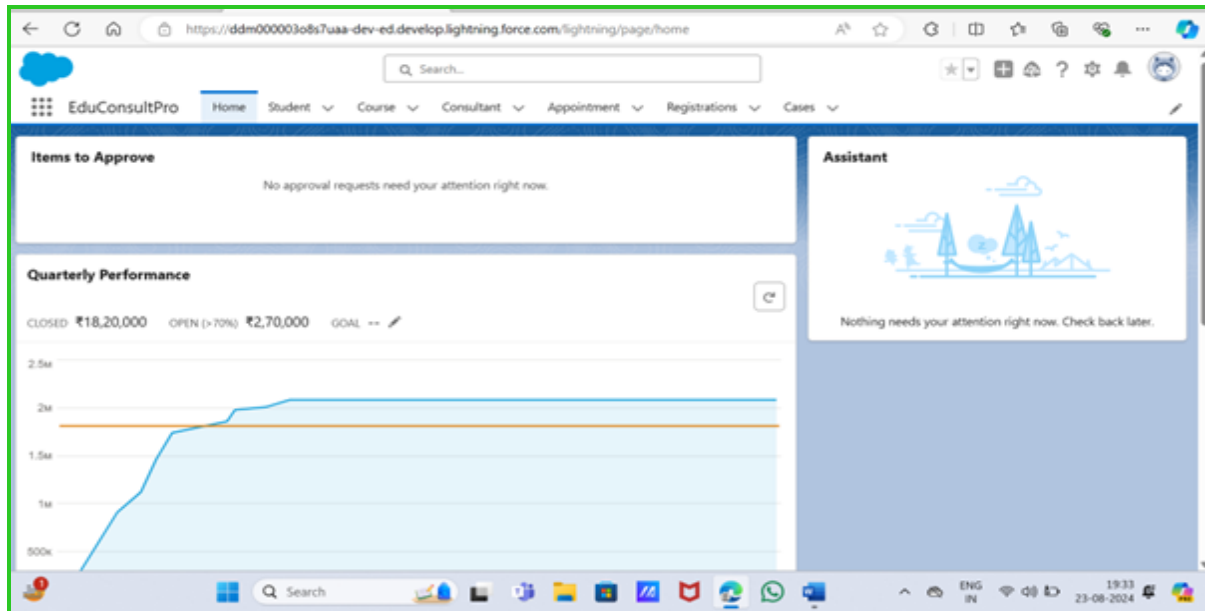
In the picture we can see the status configuration

The screenshot shows the Salesforce Setup interface for the 'Case' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Case Page Layouts, Case Close Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Compact Layouts. The main content area is titled 'Case' and shows the 'Fields & Relationships' configuration. The table lists 43 items, sorted by Field Label. The visible items are:

Field Label	Field Name	Field Type	Field Format	Field Length	Field Required	Field Visible
Stopped Since	StopStartDate	Date/Time				
Student	Student__c	Lookup(Student)			✓	▼
Subject	Subject	Text(255)				
Type	Type	Picklist				▼

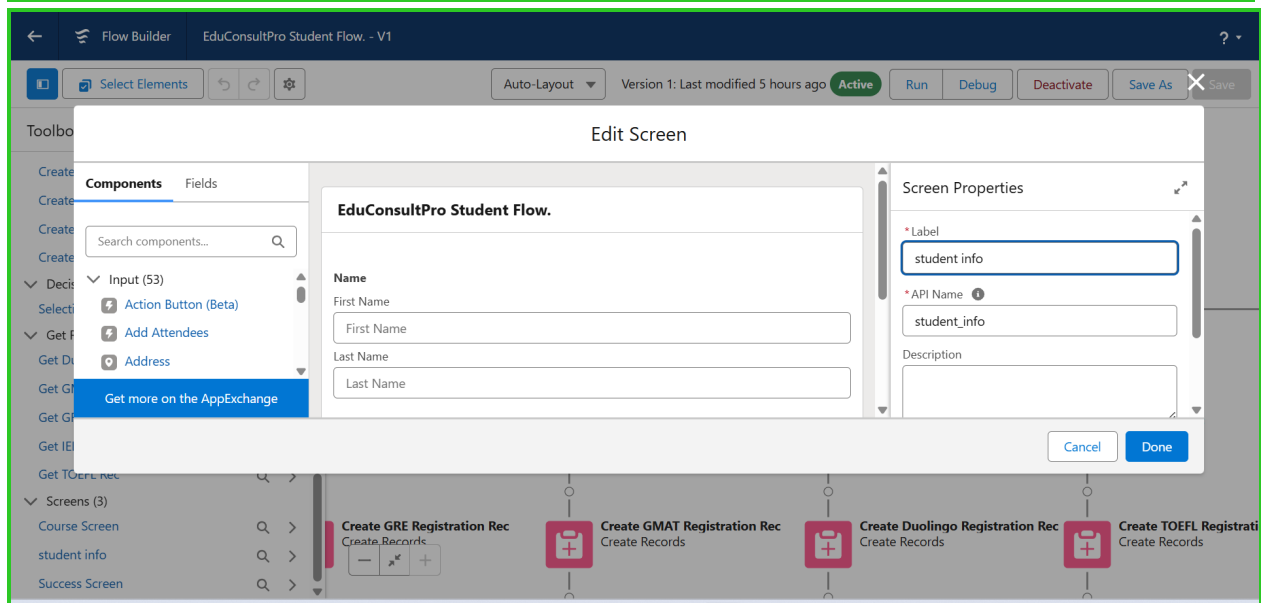
Here we see the type and status visible in the case

Finally we have created the lightning app named "EduConsultPro"

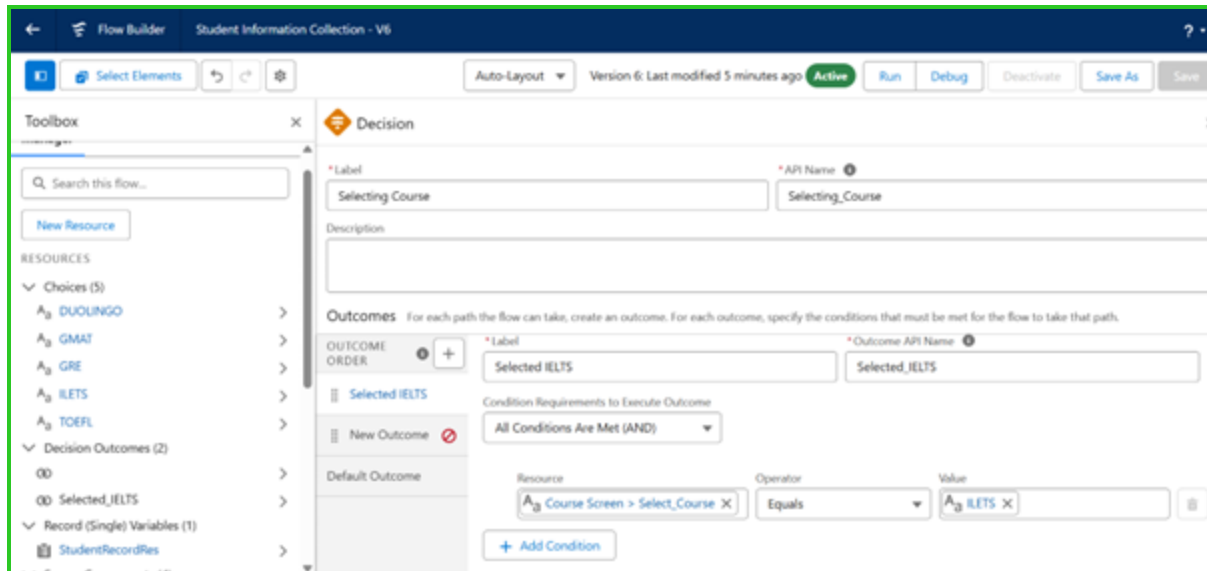


## CREATE A SCREENFLOW

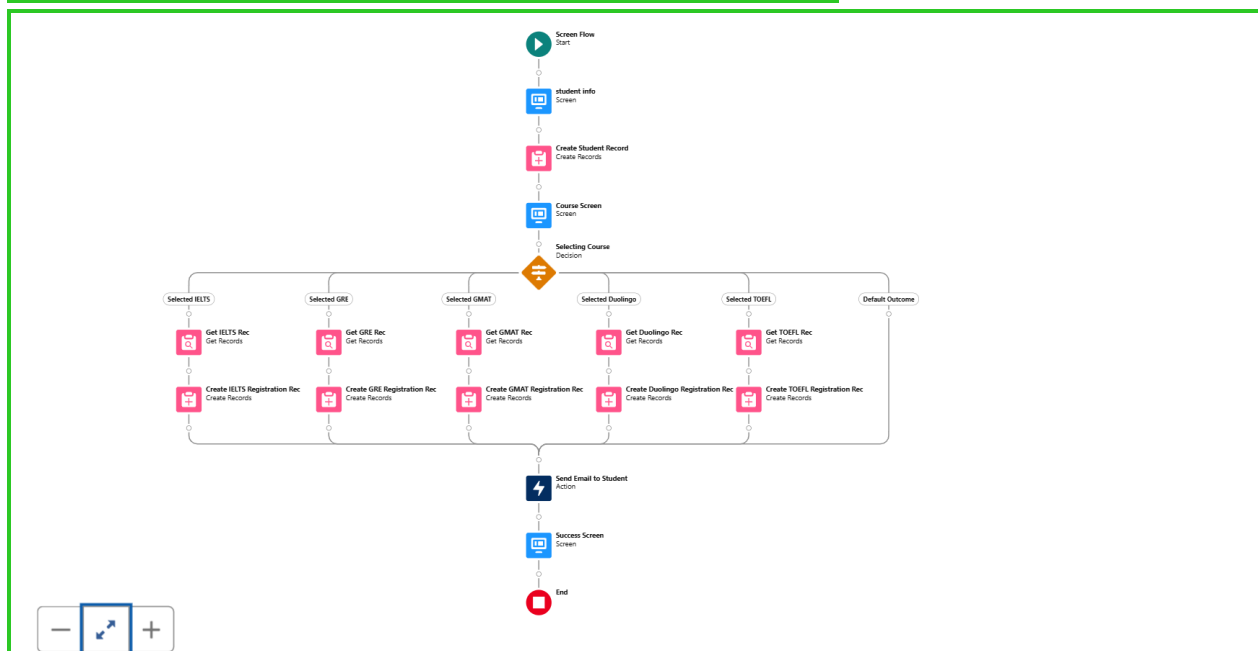
From the setup we choose the flow builder and create a screen flow and add the fields like name , email to the screen.



We set the records for the students add all the possible options with the help of picklist as seen below



In the picture below we see the full screen flow with all the details of students , records, email template, action element



## CREATE USERS

Next we create the user and give axis to the administrator and choose manger foe the approval process

# CREATE APPROVAL PROCESS

For this we create an email template as shown below

The screenshot displays the Salesforce Email Template Builder interface for a template named "Submission Template". The interface is divided into two main sections: "Details" and "Related".

**Details Section:**

- Information:**
  - Email Template Name: Submission Template
  - Description: Submission email template
  - Made in Email Template Builder: ☐
  - Related Entity Type: Submission Templates
  - Folder: Submission Templates
- Message Content:**
  - Subject: Submission Confirmation
  - HTML Value: Dear {{Appointment\_\_c.Student\_Name\_\_c}},  
I hope this email finds you well. I am writing to confirm the details of our upcoming appointment scheduled
  - Enhanced Letterhead: (empty field)

**Related Section:**

The "Related" section shows the "Appointment Details" for the template, including fields for Appointment No, Student Name, Consultant Name, Date & Time, and Purpose. The template content is displayed below the "Related" section, showing a confirmation message for an appointment.

**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}}

**Message Content:**

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}},  
EduConsultantPro

Similiary email templates are crettaed for approval and rejection

## Creating an approval process

**Approval Assignment Email Template**

Initial Submitters: Appointment Owner

Created By: Ishika Shail, 24/08/2024, 1:41 pm

Modified By: Ishika Shail, 24/08/2024, 2:16 pm

**Initial Submission Actions**

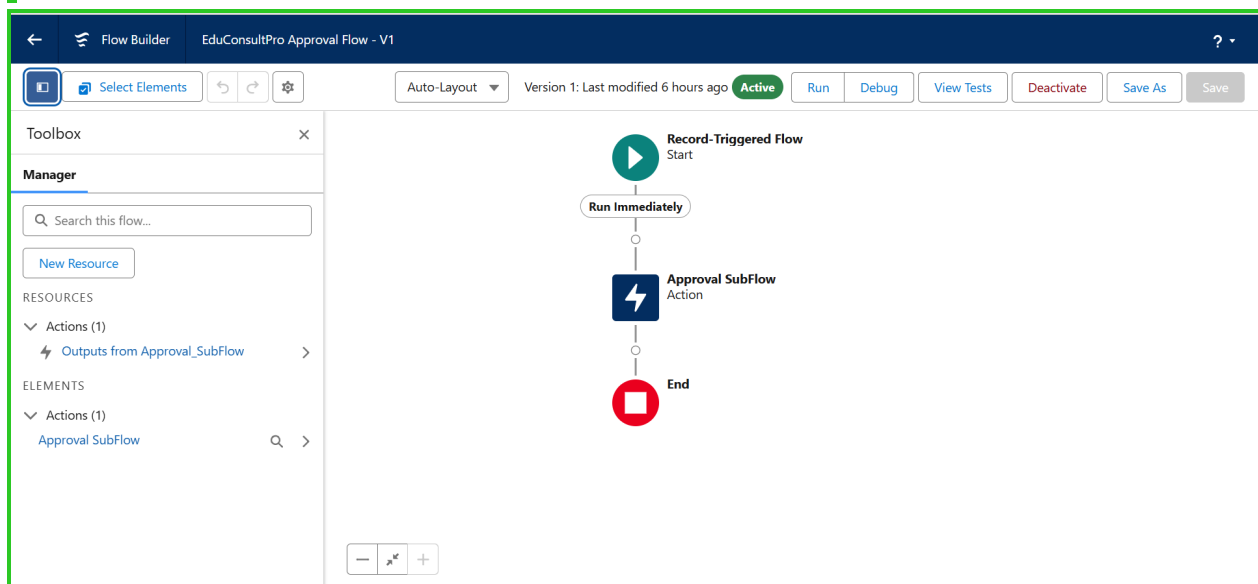
Action	Type	Description
<a href="#">Edit</a>   <a href="#">Remove</a>	Record Lock	Lock the record from being edited
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	Submitted
<a href="#">Edit</a>   <a href="#">Remove</a>	Email Alert	Rejection email alert
<a href="#">Edit</a>   <a href="#">Remove</a>	Email Alert	Submission Email Alert
<a href="#">Edit</a>   <a href="#">Remove</a>	Email Alert	Approval Email alert

**Approval Steps**

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
<a href="#">Show Actions</a>   <a href="#">Edit</a>	1	Step 1			Manager	Final Rejection

## CREATE A RECORD TRIGGER FLOW

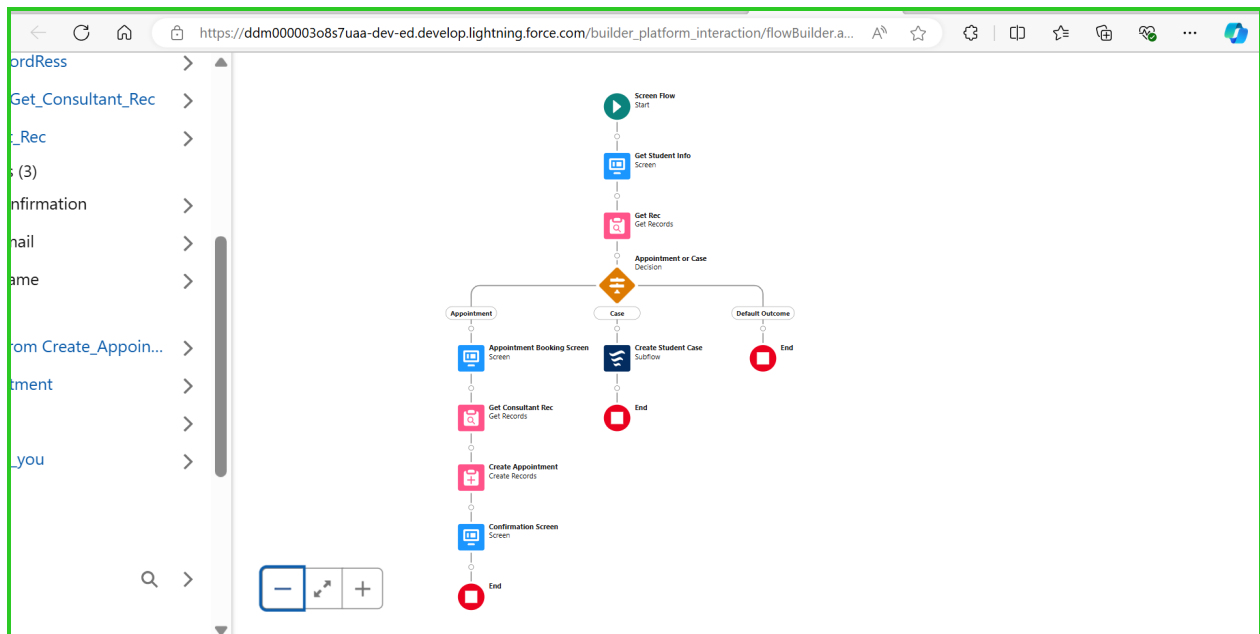
Next we create a trigger flow and configure the start element and add an action element





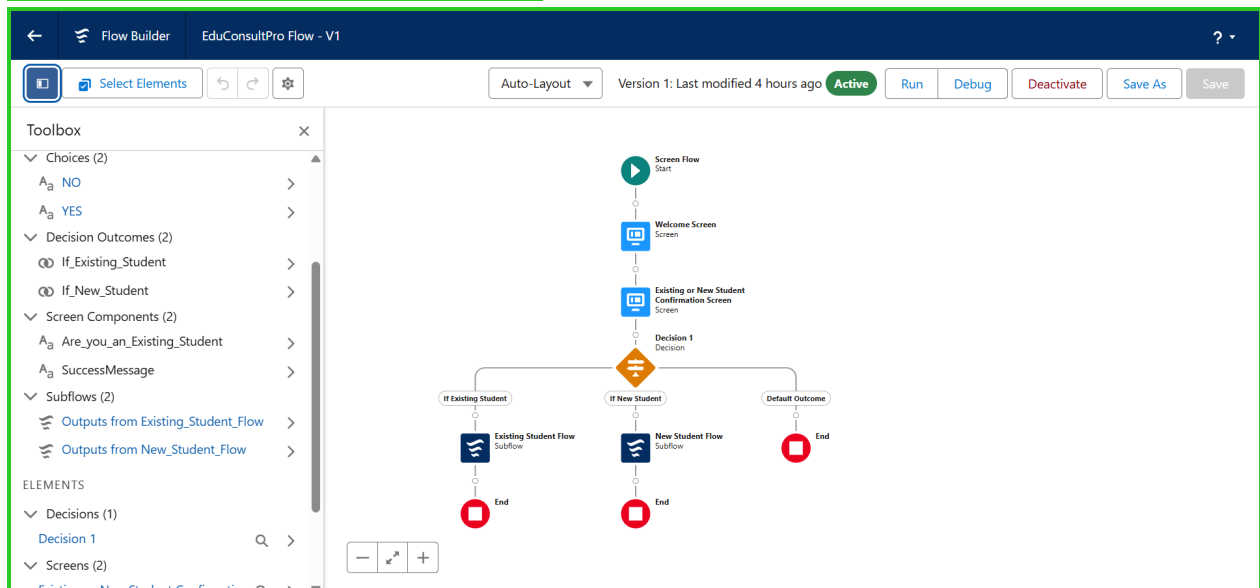
## CREATE A SCREEN FLOW FOR EXISTING STUDENT

Now we create a screen flow for existing students to book an appointment, here we add a screen, get the records, add decision elements, create appointment record using create records element and adding subflow as shown in the picture below.



## CREATE A SCREEN TO COMBINE ALL FLOWS

Next we create a screen flow to combine all the flows at one we add decisions, subflows and screens



## CREATE A LIGHTNING APP PAGE

In the last we create a lightning app page with the flow details. It is the homepage of the project

