A CRM Application To Manage The Services Offered By An Institution

Project Description:

EduConsultPro Institute is a leading educational institution offering a variety of courses and programs in diverse fields. With a growing number of prospective students seeking admission each year, the institute faces challenges in managing the admission process, students enquiry, and expert consulting services efficiently. To address these challenges, EduConsultPro Institute decides to leverage Salesforce CRM to streamline the admission process and enhance the overall experience for both students and admissions staff.

The use case focuses on the admission process for prospective students interested in enrolling in courses and programs offered by EduConsultPro Institute. The goal is to provide a seamless and transparent experience for students while enabling admissions staff to efficiently review and process admission applications, students enquiry and case management

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1.Abstract:

EduConsultPro Institute’s new Salesforce-based CRM system will streamline student admissions, consulting, and immigration case management, centralizing operations for efficiency and better service delivery.

Admissions: Students submit applications via an integrated online form, triggering automated confirmations. Admissions data is securely stored for team access, with real-time dashboards providing insights into trends and acceptance rates.

Consulting: Students can request consulting services online, with requests logged and routed to consultants through Salesforce. Consultants manage schedules and monitor activity, improving coordination and response times.

Immigration: The CRM system tracks immigration cases for international students, including visa applications and document reminders, ensuring compliance and reducing processing delays.This Salesforce solution optimizes EduConsultPro’s core processes, enhancing support for students and driving institutional growth.

2 .CREATING OBJECTS FROM SPREAD SHEET

To streamline data organization, EduConsultPro will create custom objects directly from spreadsheets using Salesforce's built-in tools. This process allows for efficient object creation and accurate data mapping across operational needs. Here's an overview:

1. Creating the Course Object

   - Go to Object Manager in Salesforce.

   - Select “Custom Object from Spreadsheet.”

   - Download the course data spreadsheet and upload it to Salesforce.

   - Map each column in the spreadsheet to the corresponding fields in Salesforce.

   - Complete the process to generate the Course object.

2. Creating Additional Objects

   - Repeat these steps for additional objects like Consultant, Student, and Appointment:

     - Access Object Manager and choose “Create Object from Spreadsheet.”

     - Download the required spreadsheet (e.g., Consultant, Student, Appointment).

     - Upload each file and map fields accordingly.

     - Finalize each by completing the upload to create the respective objects.

3. Establishing Lookup Relationships

 - After creating the objects, establish relationships among them to ensure accurate data linkage across the system:

I. Between Appointment and Student

   - In Object Manager, select "Appointment."

   - Go to "Fields & Relationships" and click "New."

- Choose "Lookup Relationship" and select "Student" as the related object.

- Complete the details and save.

II. Between Appointment and Consultant

- In Object Manager, select "Appointment" again.

- Under "Fields & Relationships," click "New."

- Create another "Lookup Relationship" and choose "Consultant" as the related object.

- Complete the required fields and save.

4. Creating the Registration Object:

- In Object Manager, select "Create Custom Object."

- Name this object "Registration."

- Add fields for essential details like "Student ID" and "Course ID."

- Save to complete.

5. Building a Lookup Relationship Between Student and Case:

- Go to Object Manager and select "Case."

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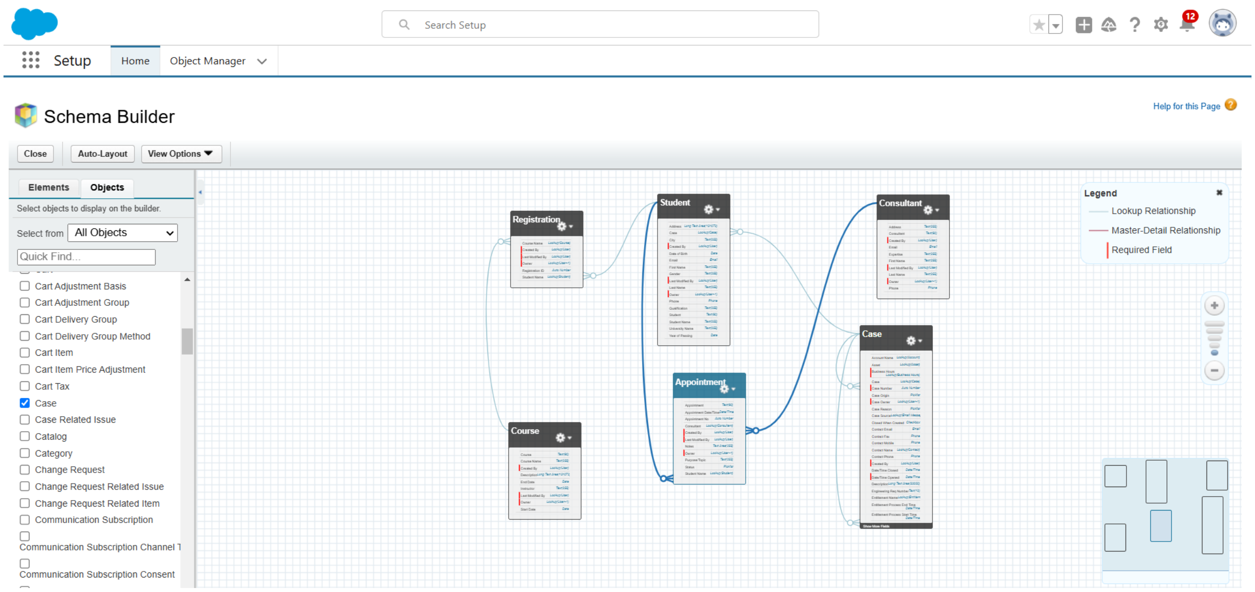
6. Building a Lookup Relationship Between Student and Case:

- In Object Manager, select "Case."

- Go to "Fields & Relationships" and click "New."

- Create a "Lookup Relationship" to "Student" and complete the setup.

These steps establish a foundational data structure in Salesforce, supporting efficient management of appointments, registrations, and cases



Configuring the Case Object

1. Edit the Case Object:

- Go to Object Manager in Salesforce.
- Select "Case" from the list of objects.

2. Add Values to the "Type" Field:

- Under "Fields & Relationships," locate and select the "Type" field.
- Click "New" to add options.
- Add values:
  - Immigration
  - Visa Application

3. Add Status Values:

- Go back to "Fields & Relationships" and open the "Status" field.
- Click "New" to add options.
- Add status values:

- Successful

- Pending

- Rejected

4. Configure for Immigration and Visa Tracking:

- These new fields and values allow the "Case" object to manage and monitor student immigration and visa processes, ensuring each case is tracked and that compliance with timelines is maintained.

Setting Up a Lightning App

1. Access Setup:

- In Salesforce, go to "Setup."

- In the Quick Find box, search for and select "App Manager."

2. Create a New Lightning App:

- Click "New Lightning App."

- Name the app "EduConsultPro."

3. Add Items to the App:

- Click "Next" three times to move through the initial setup screens.

- In the "Available Items" section, select and add these items to the "Selected Items" list:

- Home

- Students

- Courses

- Consultants

- Appointments

- Registrations

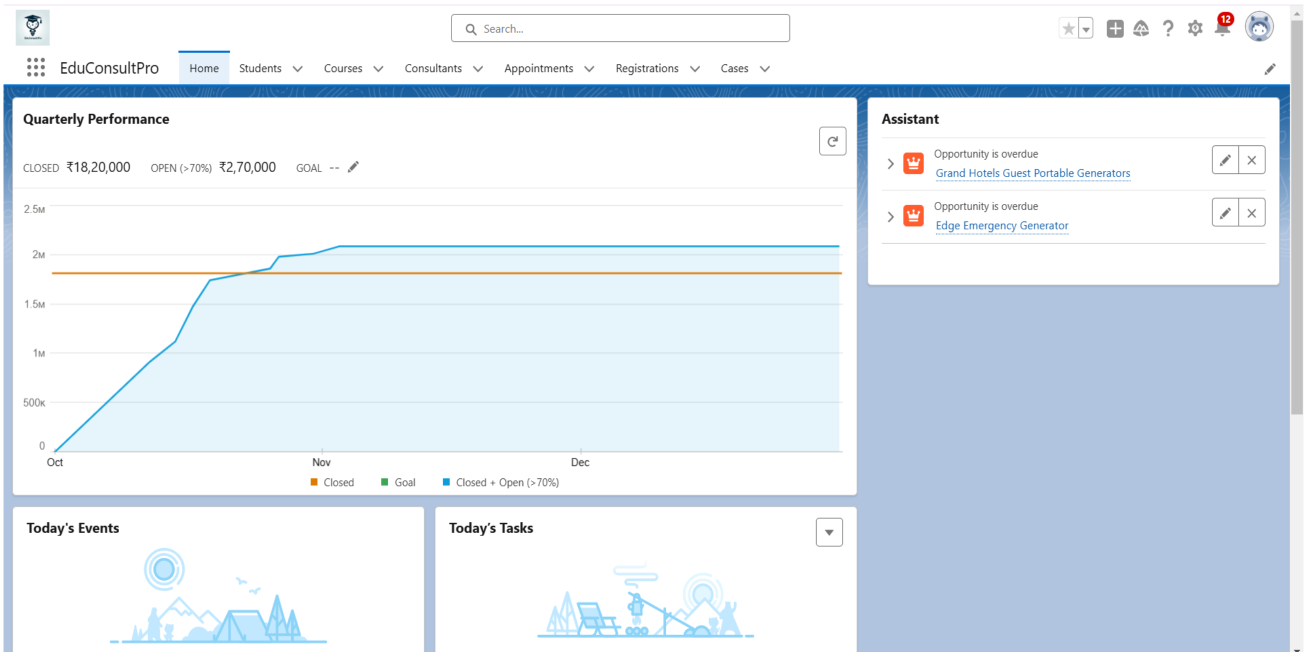
- Cases

4. Assign Profiles to the App:

- In the "Available Profiles" section, locate "System Administrator" and add it to "Selected Profiles."

5. Save and Finalize:

- Click "Save & Finish" to complete the app setup.



3. CREATE A SCREENFLOW FOR ADMISSION APPLICATION

1. Create a New Screen Flow:

   - Go to "Setup" in Salesforce.

   - In the Quick Find box, type "Flow Builder" and select it.

   - Click "New Flow."

   - Choose "Screen Flow" and click "Create."

2. Add a Screen Element:

   - In Flow Builder, drag the "Screen" element from the left sidebar onto the canvas.

   - In the Screen Properties pane, enter "Student Info" as the Label.

3. Create a New Resource:

   - Click "Record Variable" to create a new resource.

   - Name the resource "StudentRecordRes."

   - Select "Record" as the resource type.

   - For the Object, select "Student."

4. Add Fields to the Screen:

   - Drag the necessary fields from the Fields tab onto the screen to collect student information.

   - Suggested fields include:

     - First Name

     - Last Name

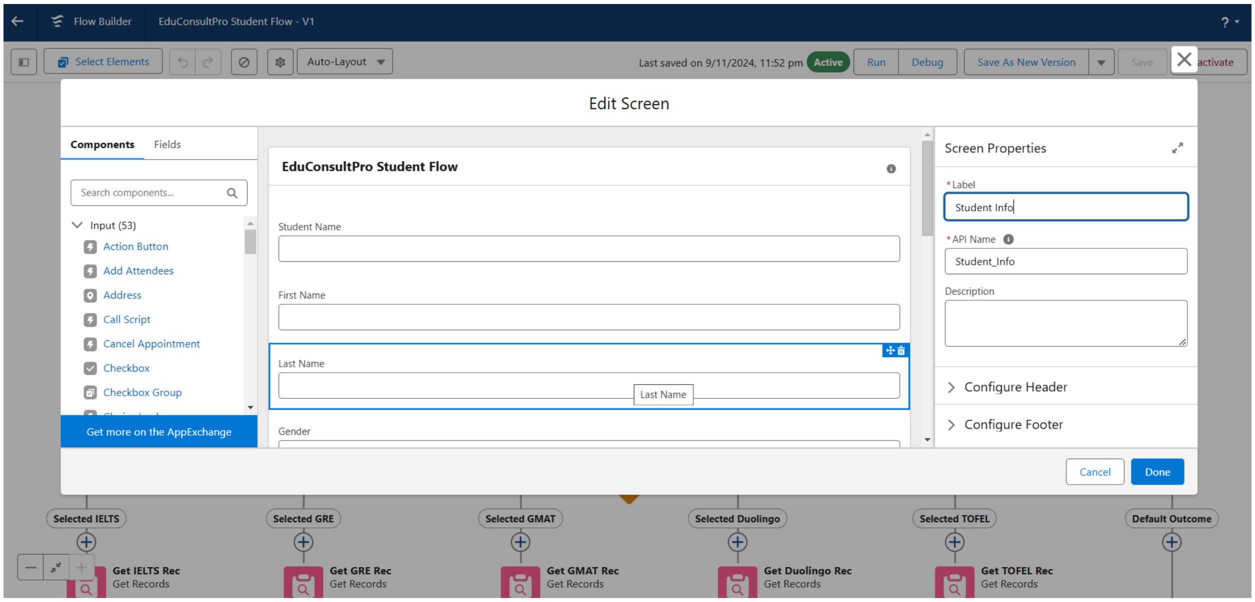
     - Email

     - Phone

5. Configure and Save the Screen Flow:

- Configure any additional properties or settings as needed.

- Once satisfied, click "Save" to save your Screen Flow.



Creating Student Record Using Create Element

1. Add a Create Element:

- In Flow Builder, ensure the "Student Info" Screen element is already added to the flow.

- Drag the "Create Records" element from the left sidebar onto the canvas, placing it immediately after the "Student Info" Screen element.

2. Label the Create Element:

- In the "Create Records" properties pane, label the element as "Create Student Record."

3. Configure the Create Element:

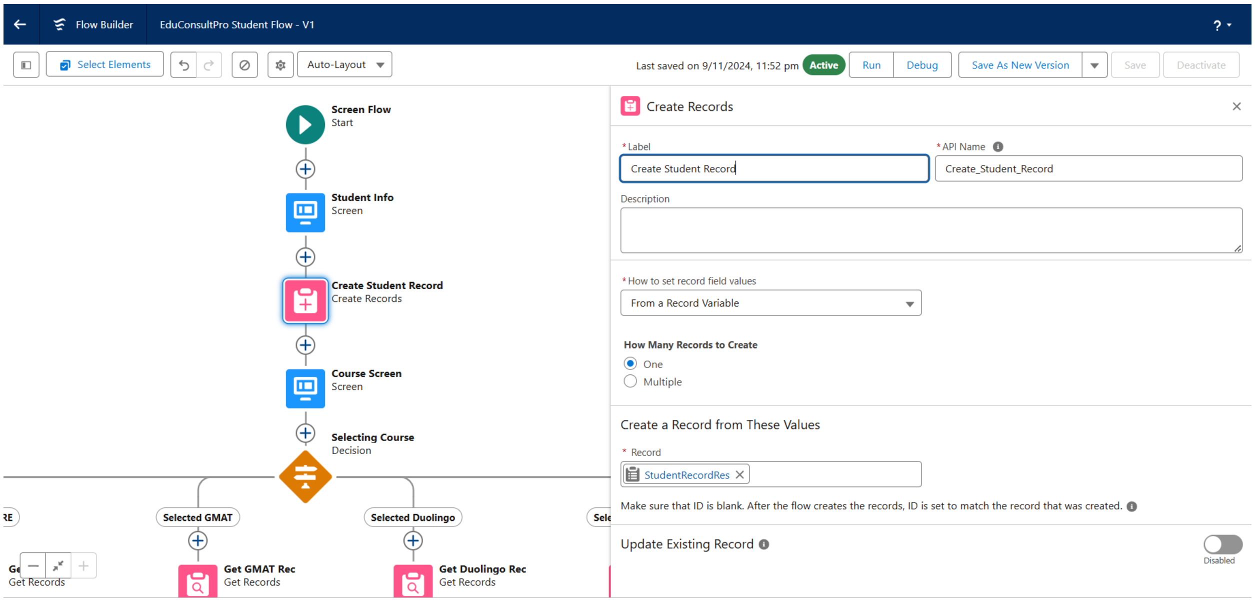
- For "How many records to create," select "One."

- For "How to Set the Record Fields," select "Use all values from a record."

4. Set the Record Variable Resource:

- Under "Create a Record from These Values," select the record variable resource (e.g., "StudentRecordRes").

StudentRecordRes that was created in the Student Info screen.



Add Screen Element

1. Add a Screen Element:

- In Flow Builder, drag a "Screen" element from the left sidebar onto the canvas, placing it after the "Create Student Record" element.

- In the "Screen Properties" pane, label this screen as "Course Screen."

2. Add a Picklist Component:

- On the "Course Screen," drag the "Picklist" component from the left sidebar onto the screen.

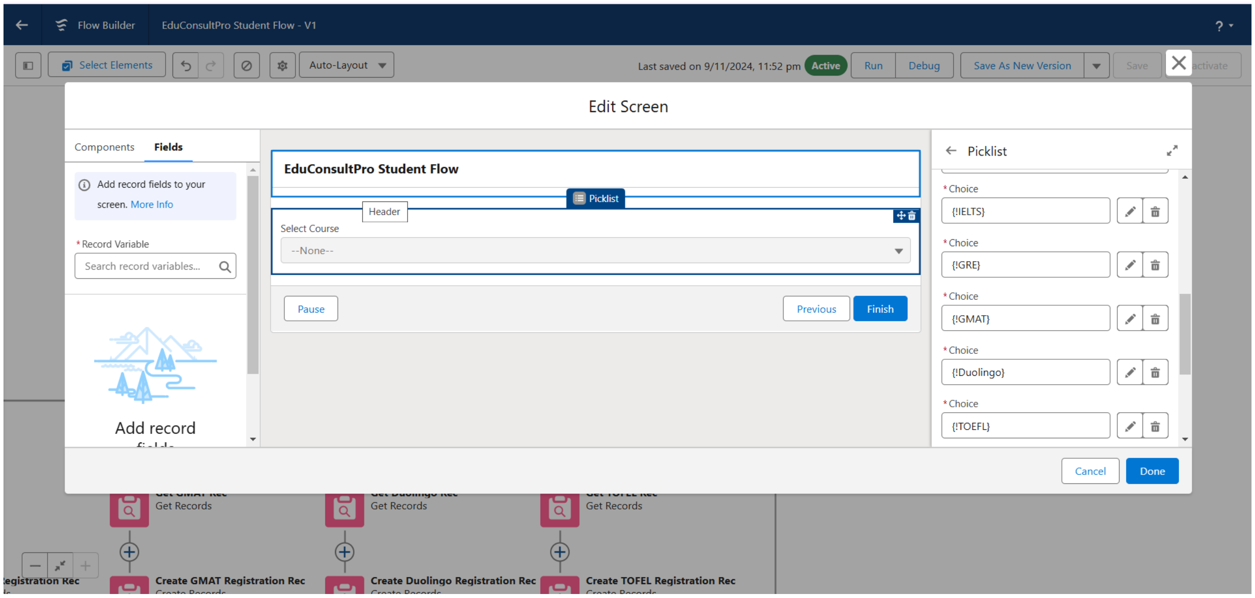
- Label the Picklist component as "Select Course."

3. Configure the Picklist Choices:

- In the "Choices" section of the Picklist component, click on "+ Add Choice."

- For the first choice, type "IELTS" and press Enter. This will automatically create a variable named "IELTS."

Repeat this step for each of the following choices: ○ GRE ○ GMAT ○ Duolingo ○TOFEL



1. Add a Decision Element:

- In Flow Builder, drag a "Decision" element from the left sidebar onto the canvas, placing it after the "Course Screen" element.

- In the "Decision Properties" pane, label it as "Selecting Course."

2. Configure the Decision Outcomes:

- Outcome :

  - Label: "Selected IELTS."

  - Resource: Select_Course (the Picklist component from the "Course Screen").

  - Operator: Equals.

  - Value: {!IELTS} (the choice variable created from the "Course Screen").

  - Click on "+ Add Outcome" to add a new outcome.

- Outcome 2:

  - Label: "Selected GRE."

- Resource: Select_Course.

- Operator: Equals.

- Value: {!GRE} (create GRE as a choice variable).

- Outcome 3:

  - Label: "Selected GMAT."

  - Resource: Select_Course.

  - Operator: Equals.

  - Value: {!GMAT} (create GMAT as a choice variable).

- Outcome 4:

  - Label: "Selected Duolingo."

  - Resource: Select_Course.

  - Operator: Equals.

  - Value: {!Duolingo} (create Duolingo as a choice variable).

- Outcome 5:

  - Label: "Selected TOEFL."

  - Resource: Select_Course.

  - Operator: Equals.

  - Value: {!TOEFL} (create TOEFL as a choice variable).

3. Click Done to complete the configuration of the Decision element.

Add GET Record Element

- In Flow Builder, drag a "Get Records" element from the left sidebar onto the canvas, placing it under the "Selecting Course" Decision element on the "Selected IELTS" path.

- In the "Get Records" Properties pane, label it as "Get IELTS Rec."

2. Configure the GET Record Element:

   - Object: Select "Course" (or the relevant object to fetch course records).

   - Condition Requirements: Choose "All Conditions Are Met (AND)."

3. Add Condition:

   - Field: Select "Course Name."

   - Operator: Choose "Equals."

   - Value: Set to {!Select_Course} (the Picklist component from the "Course Screen").

4. Repeat for Other Paths:

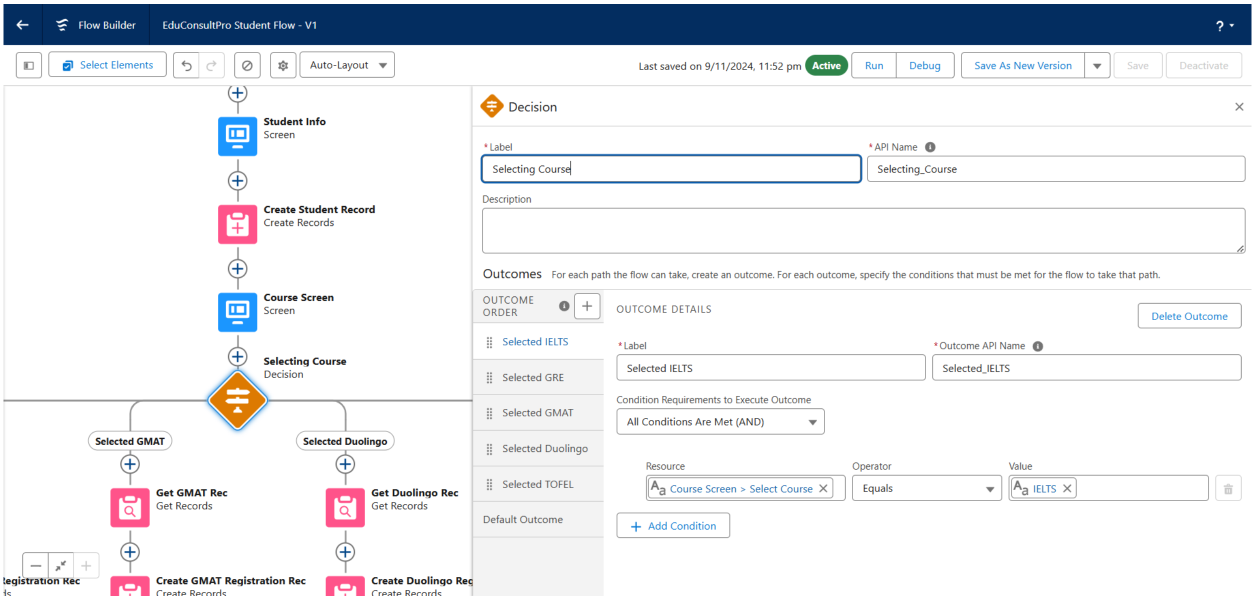
   - Repeat the above steps for each of the remaining paths (GRE, GMAT, TOEFL, Duolingo) by creating additional "Get Records" elements:

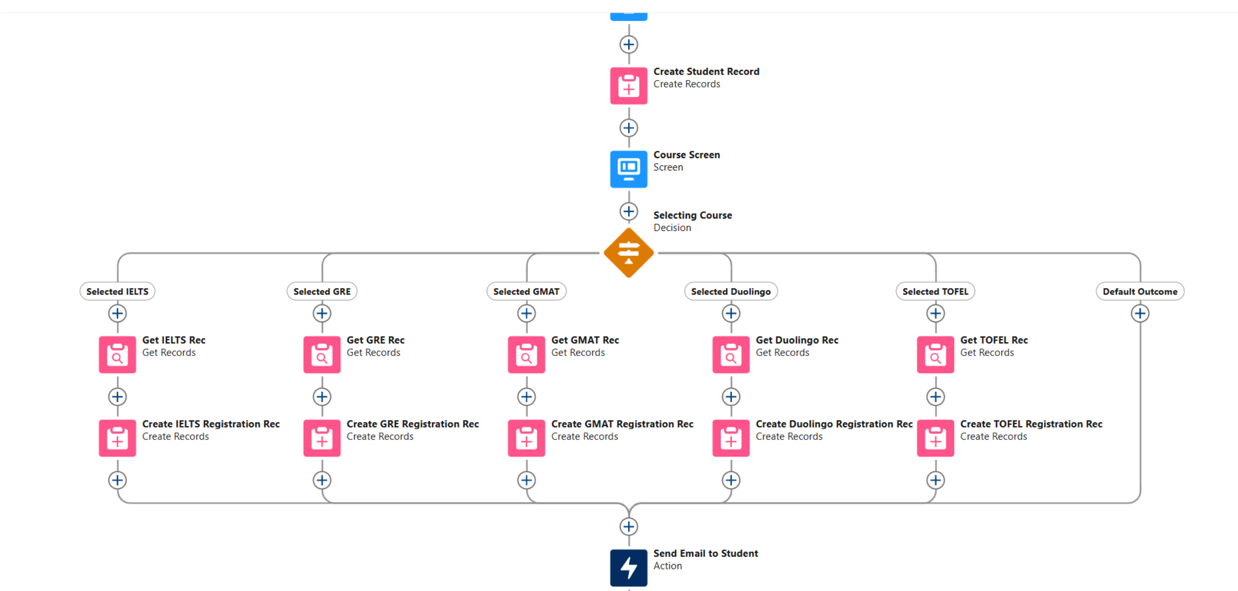
     - For the "Selected GRE" path, label it as "Get GRE Rec."

     - For the "Selected GMAT" path, label it as "Get GMAT Rec."

     - For the "Selected Duolingo" path, label it as "Get Duolingo Rec."

     - For the "Selected TOEFL" path, label it as "Get TOEFL Rec."





Create Registration Record Using Create Records Element

Steps:

1. Create Element for IELTS:

- In Flow Builder, drag a "Create Records" element from the left sidebar onto the canvas, placing it after the "Get IELTS Rec" element.

- In the "Create Records" Properties pane, label it as "Create IELTS Registration Rec."

2. Configure the Create Element for IELTS:

- How many records to create: Choose "One."

- How to Set the Record Fields: Select "Use separate resources, and literal values."

- Object: Choose "Registration."

3. Add Fields for IELTS Registration:

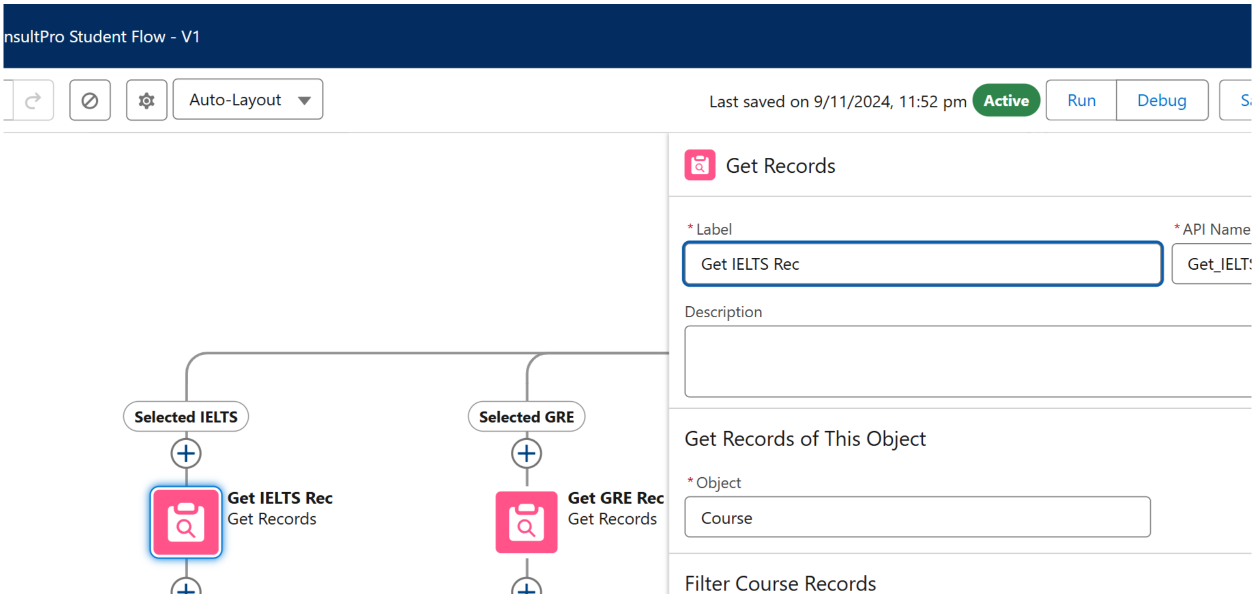
- Field: Enter `Course_Name__c`.

- Value: Set to `{!Get_IELTS_Rec.Id}` (this references the ID of the retrieved IELTS course).

- Field: Enter `Student_Name__c`.

- Value: Set to `{!StudentRecordRes.Id}` (this references the ID of the student record).

4. Click Done to finish the configuration of the Create element for IELTS.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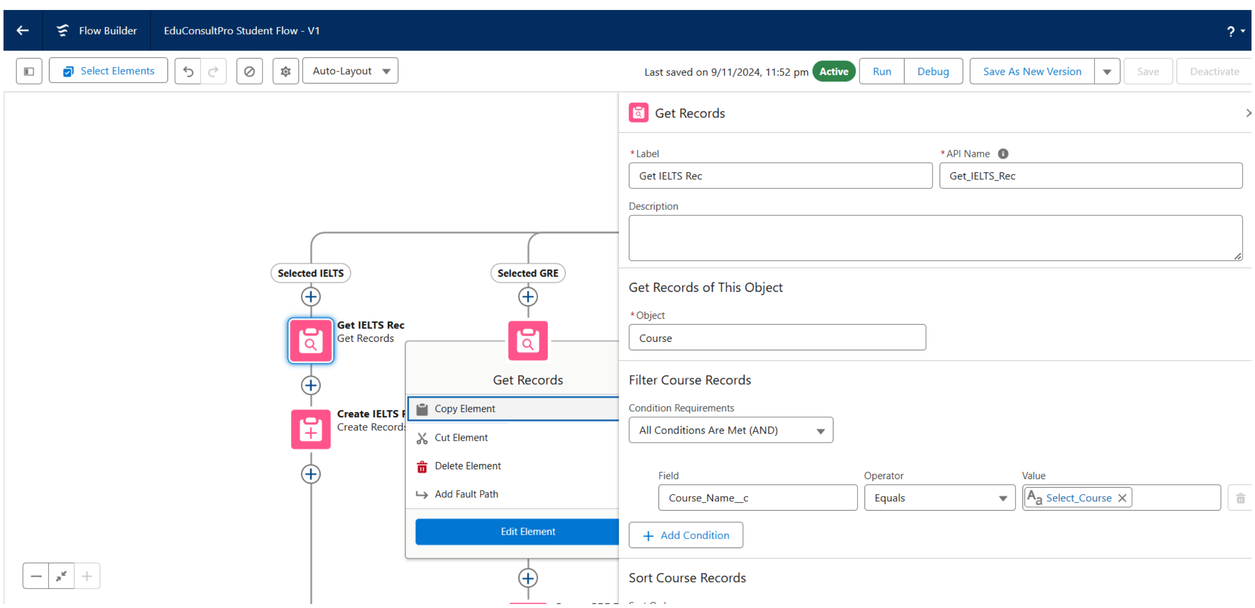
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Filter Course Records
Condition Requirements
All Conditions Are Met (AND)
Field
Course_Name__c
Operator
Equals
Value
Select_Course
Add Condition
Sort Course Records
Selected IELTS
Selected GRE
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Delete Element
Add Fault Path
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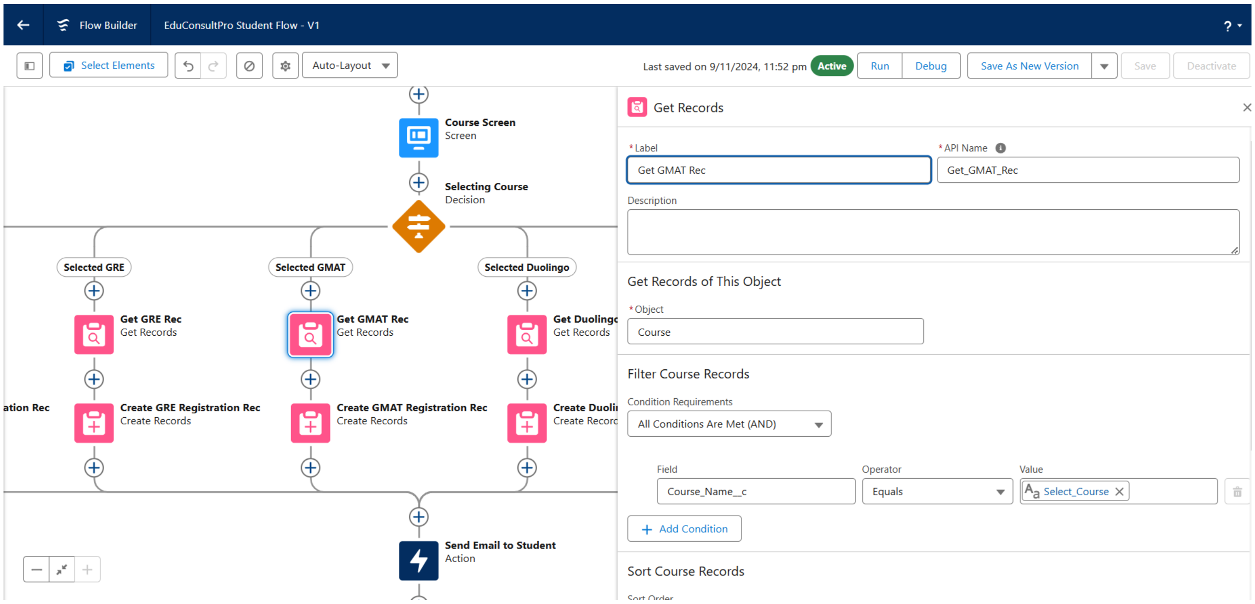
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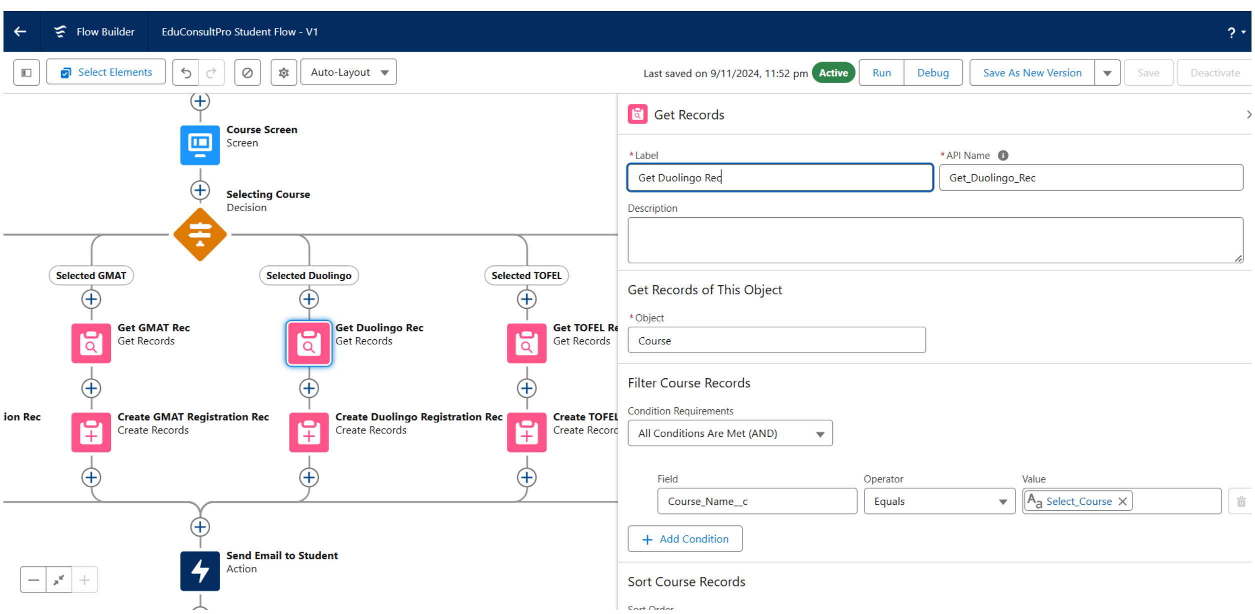
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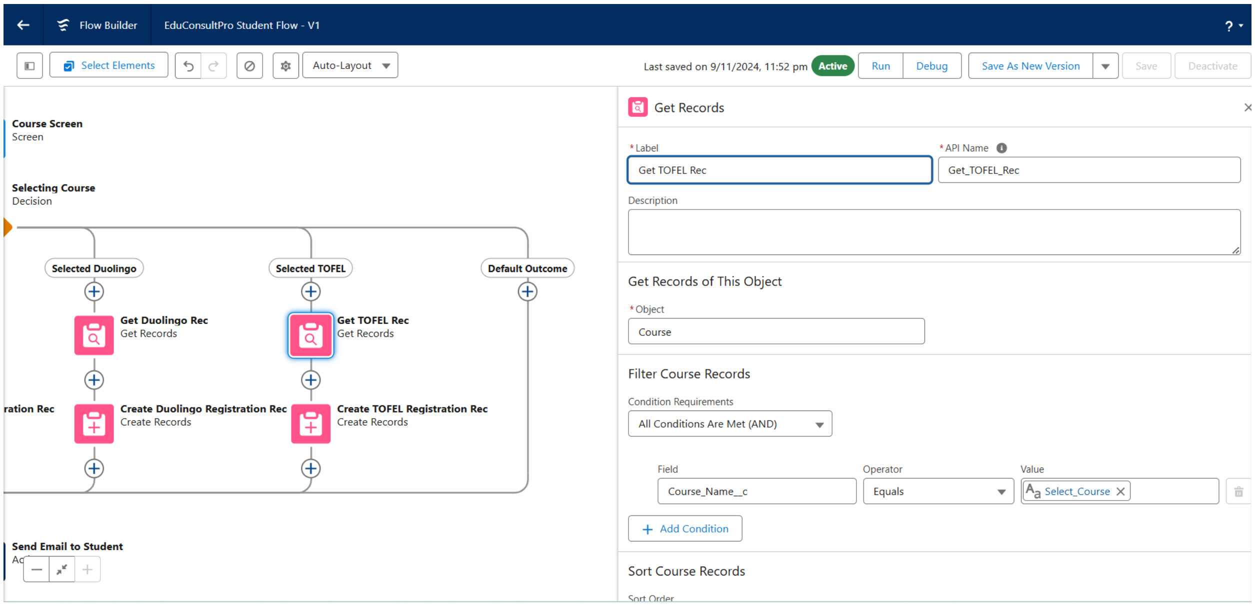


3.8 Add an Action Element

Steps

1. Add an Action Element:

- In Flow Builder, drag an "Action" element from the left sidebar onto the canvas, placing it after all the Decision paths (IELTS, GRE, GMAT, TOEFL, Duolingo).

- In the "Action Properties" pane, label it as "Send Email to Student."

2. Configure the Action Element:

- Action Type: Choose "Send Email" (or the relevant email action available in your Salesforce instance).

3. Set Input Values:

- Body:

  - Set the input value to `{!StuRegistrationEmailTextTempBody}` (the Text Template created earlier for the body of the email).

- Recipient Address List:

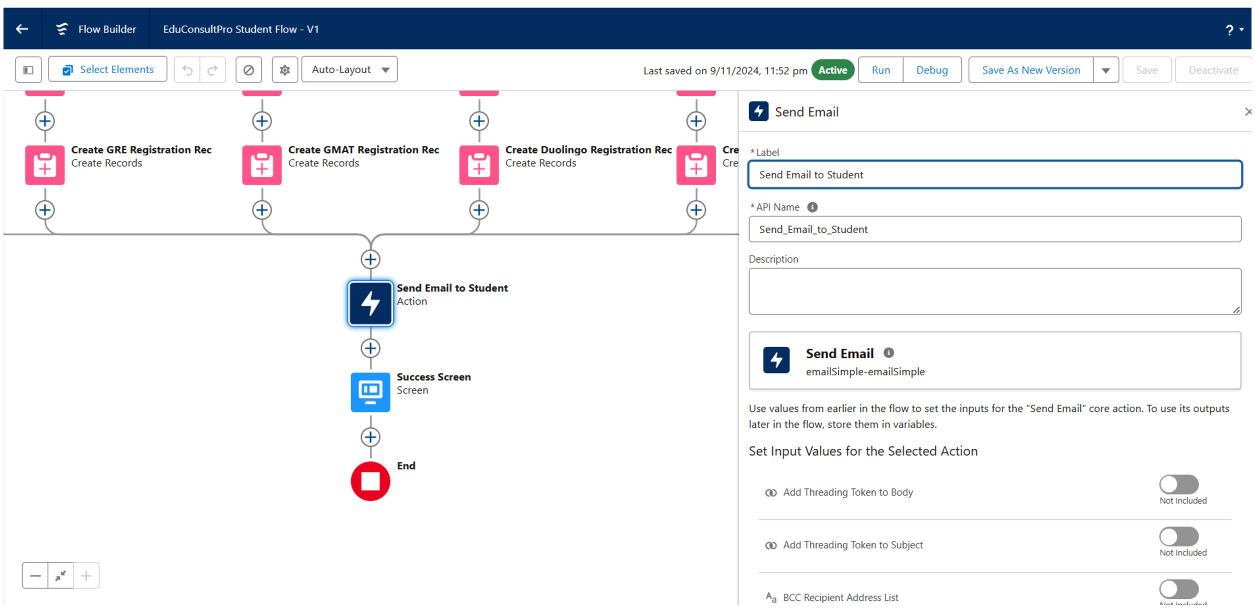
- Set the input value to `{!StudentRecordRes.Email__c}` (the student's email address).

- Subject:

- Set the input value to `{!StuRegistrationEmailTextTempSub}` (create or specify this variable if it’s not already made for the email subject).

4. Click Done

This will allow the flow to send an email to the student with the appropriate subject and body, using the email template and student’s email address.



3.9 Add Screen Element

1. Add a Screen Element:

- In Flow Builder, drag a "Screen" element from the left sidebar onto the canvas, placing it after the "Send Email to Student" Action element.

- In the "Screen Properties" pane, name it as "Success Screen."

2. Add Display Text Component:

   - In the left sidebar, search for the "Display Text" component.

   - Drag the "Display Text" component into the "Success Screen" panel.

3. Configure the Display Text Component:

   - Label: Set the label as "SuccessMessage."

   - Text: In the "Resource Picker" box, enter the following text:

Dear {!StudentRecordRes.Name},

Congratulations and welcome to EduConsultantPro!

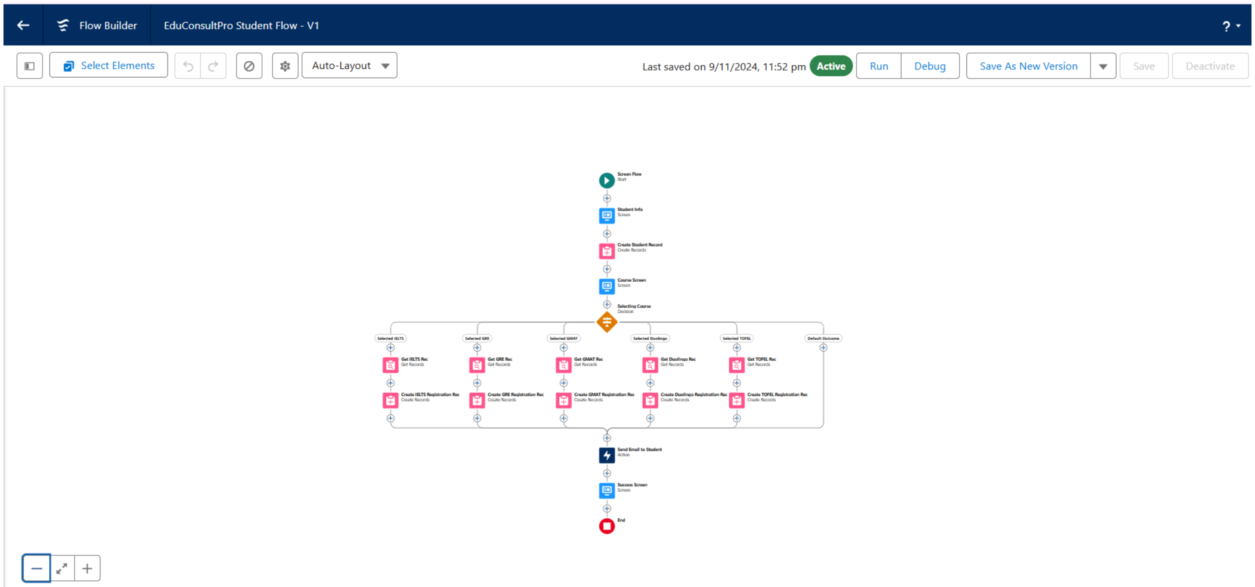
We are thrilled to inform you that your registration on our platform has been successfully completed.

You are now a member of our esteemed community dedicated to helping students like you achieve your educational and immigration goals.

Your registration details have been sent via email; please check your inbox.

Thank you.

4. Click Done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Create Duolingo Registration Rec
Create Records
Create TOFEL Registration Rec
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Send Email to Student
Action
Success Screen
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End

4.CREATE USER

4.1 User Creation

1. Navigate to User Creation:

   - Access Setup by clicking the gear icon in the upper right corner.

   - Under the Administration section, choose Users.

   - Click on New User.

2. Enter User Details:

   - Last Name: Input Consultant.

   - License: Choose Salesforce Platform.

   - Profile: Select Standard Platform User.

3. Fill in Mandatory Fields:

   - Complete all additional required fields (e.g., First Name, Email, Username) necessary for user creation.

4. Save the User:

5. Configure User Settings

I.Navigate to User Settings:

   - Access Setup.

   - Under Administration, choose Users.

   - Locate the user record for the newly created user and click Edit next to their name.

I. Update Approver Settings: Set Manager as Consultant:

- In Setup, go to Users.
- Locate the specific user and click Edit.
- In the Manager field, select Consultant from the dropdown menu.

Save Changes:

- Click Save to apply the changes.

5.Create an Approval Process for Property Object

5.1 Create an Email Template

1. Access Setup:

   - Click the gear icon in the upper right corner to access Setup.

   - Type Email Templates into the Quick Find box and select it.

2. Create a New Folder for Templates:

   - Open the App Launcher by clicking the grid icon in the top left corner.

   - Search for Email Templates and select it.

   - Click New Folder.

   - Enter a name for the folder (e.g., Appointment Templates) and click Save.

3. Create a New Email Template:

   - In the Email Templates section, click New Email Template.

   - Choose the folder you created (e.g., Appointment Templates).

4. Configure the Email Template:

   - Email Template Name: Enter Submission Template.

   - HTML Value: Paste the specific HTML content or body text for your email template.

Email Content (Template):

Dear {{Appointment_c.Student_Name_c}},

I hope this email reaches you in good spirits. 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 eager to meet with you 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 dedicated to providing you with the support and guidance you need.

If there are specific topics or questions you wish to discuss during our appointment, please feel free to share them with me ahead of time. This will ensure our time together is as productive and beneficial as possible.

Should you need to reschedule or cancel our appointment for any reason, please inform me at your earliest convenience so we can make alternate arrangements.

Thank you once again for choosing to collaborate with me on this matter. I am confident that our partnership will yield positive results and progress

toward your goals.

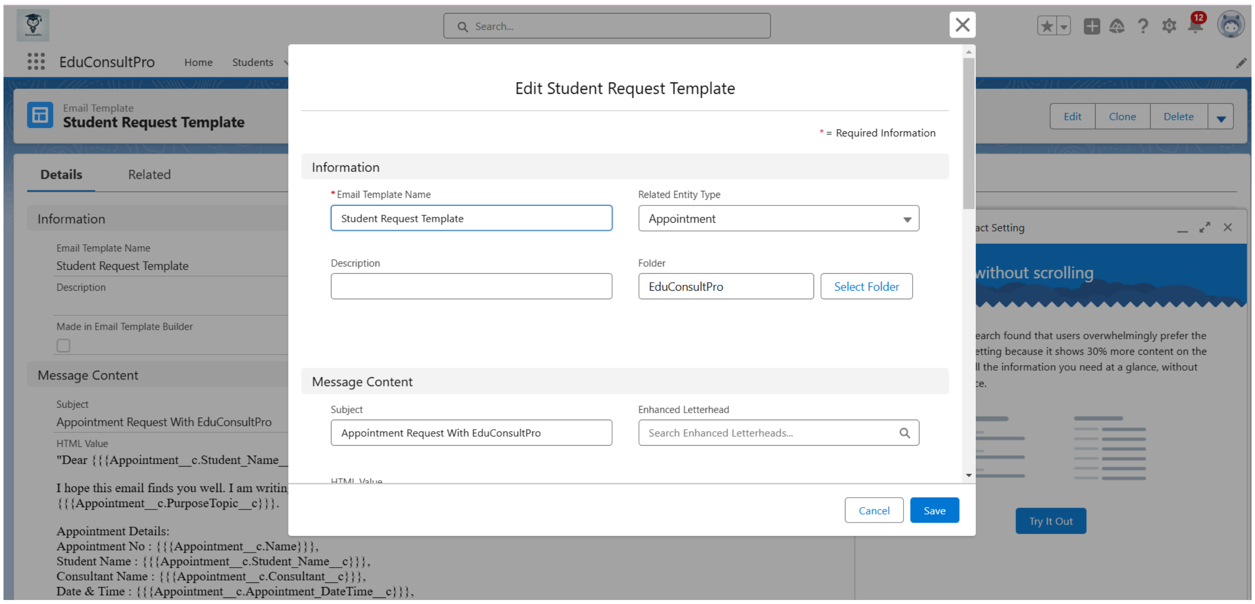
If you have any questions or need further information prior to our scheduled appointment, please don’t hesitate to contact me.

Looking forward to our meeting!

Best regards,

[Your Name]

These steps will guide you through enabling and configuring the Lightning email templates for effective communication regarding appointments. Let me know if you'd like to explore additional configurations!



5.2 Create an Approval Process

1. Navigate to Approval Processes:

- Access Setup by clicking the gear icon in the upper right corner.

- In the Quick Find box, type Approval Processes and select it.

2. Select the Object:

- Under Manage Approval Processes For, choose Appointment.

3. Create a New Approval Process:

- Click New Approval Process and select Use Jump Start Wizard.

4. Configure the Approval Process:

- Process Name: Enter Appointment Approval.

- Description: Enter Rejection Notification Email Alert.

- Unique Name: This will auto-populate.

5. Set Email Alert for Rejection Notification:

- Email Template: Choose Rejection Template.

- Recipient Type: Select Your Name(or the desired recipient).

- Save to finalize the rejection actions.

6. Select Approver:

- For the option to automatically assign an approver using a standard or custom hierarchy field, select Manager.

- Click Next, and in the Automated Approver Determined By field, select Manager again.

7. Set Record Editability Properties:

- Under Record Editability Properties, select either:

  - Administrators or the currently assigned approver can edit records during the approval process.

- Click Save to complete the initial setup of the approval process.

8. View Approval Process Details:

- Click View Approval Process Detail Page.

9. Configure Initial Submission Actions:

- Under Initial Submission Actions, click Add New.

10. Add Field Update:

- Name: Enter Submitted.

-Field to Update: Choose Appointment: Status.

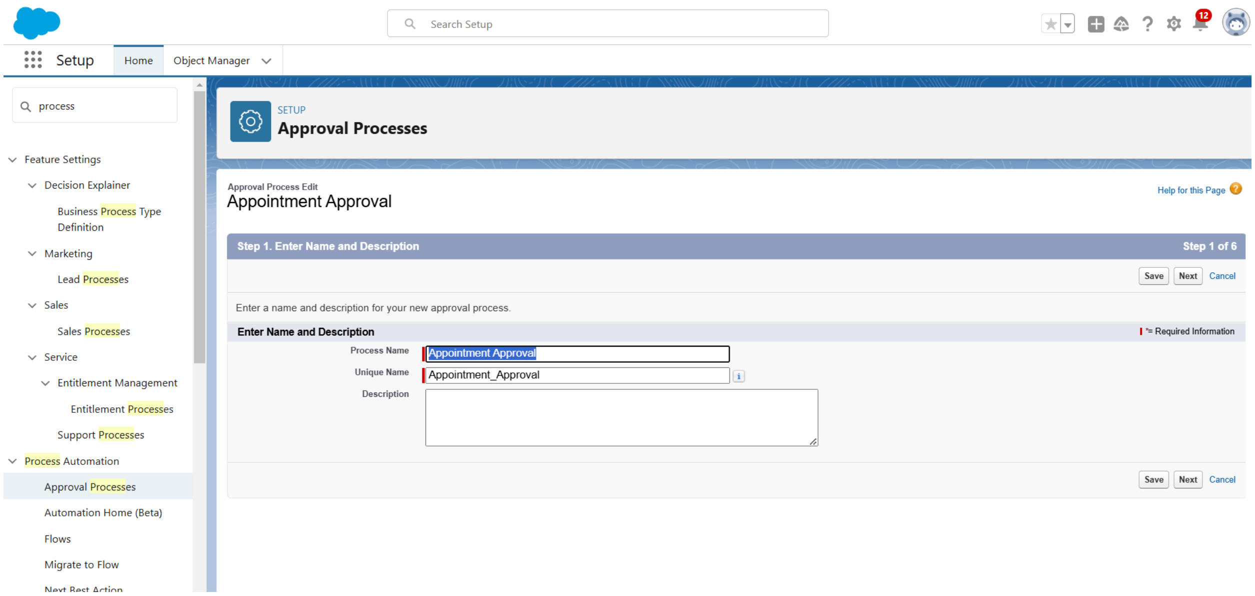
- A Specific Value: Enter Pending.

Click Add New again to add further actions.

11. Add Email Alert for Submission

- For the submission email alert, follow similar steps to configure the Email Alert action for notifying relevant users about the submission.

These steps will guide you through setting up the Appointment Approval Process and configuring the necessary actions like email alerts and field updates. Let me know if you need further assistance with any additional configurations!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Setup
Home
Object Manager
process
Feature Settings
Decision Explainer
Business Process Type Definition
Marketing
Lead Processes
Sales
Sales Processes
Service
Entitlement Management
Entitlement Processes
Support Processes
Process Automation
Approval Processes
Automation Home (Beta)
Flows
Migrate to Flow
SETUP
Approval Processes
Approval Process Edit
Appointment Approval
Help for this Page
Step 1. Enter Name and Description
Step 1 of 6
Save
Next
Cancel
Enter a name and description for your new approval process.
Enter Name and Description
= Required Information
Process Name
Appointment Approval
Unique Name
Appointment_Approval
Description
Save
Next
Cancel

6. Create a Record Triggered Flow

6.1 Configure the Start Element

1. Navigate to Flows:

   - Go to Setup by clicking the gear icon in the upper right corner.

   - Use the Quick Find box to search for Flows.

2. Create a New Flow:

   - Click New Flow.

   - Select Record-Triggered Flow from the available flow options.

   - Click Create.

3. Configure the Start Element:

   - The Configure Start window will appear.

     - Object: Choose Appointment from the dropdown list.

     - Trigger the Flow When: Select A record is created to trigger the flow when a new Appointment record is created.

     - Ensure that the flow configuration shows the selected object and trigger criteria are set correctly.

4. Click Done:

   - After configuring the Start element, click Done to proceed to the next step in the Flow Builder.

6.2 Add an Action Element

1. Add Action Element to the Flow:

- In the Flow Builder, drag an Action element from the left sidebar and position it after the Start element.

2. Configure the Action Element:

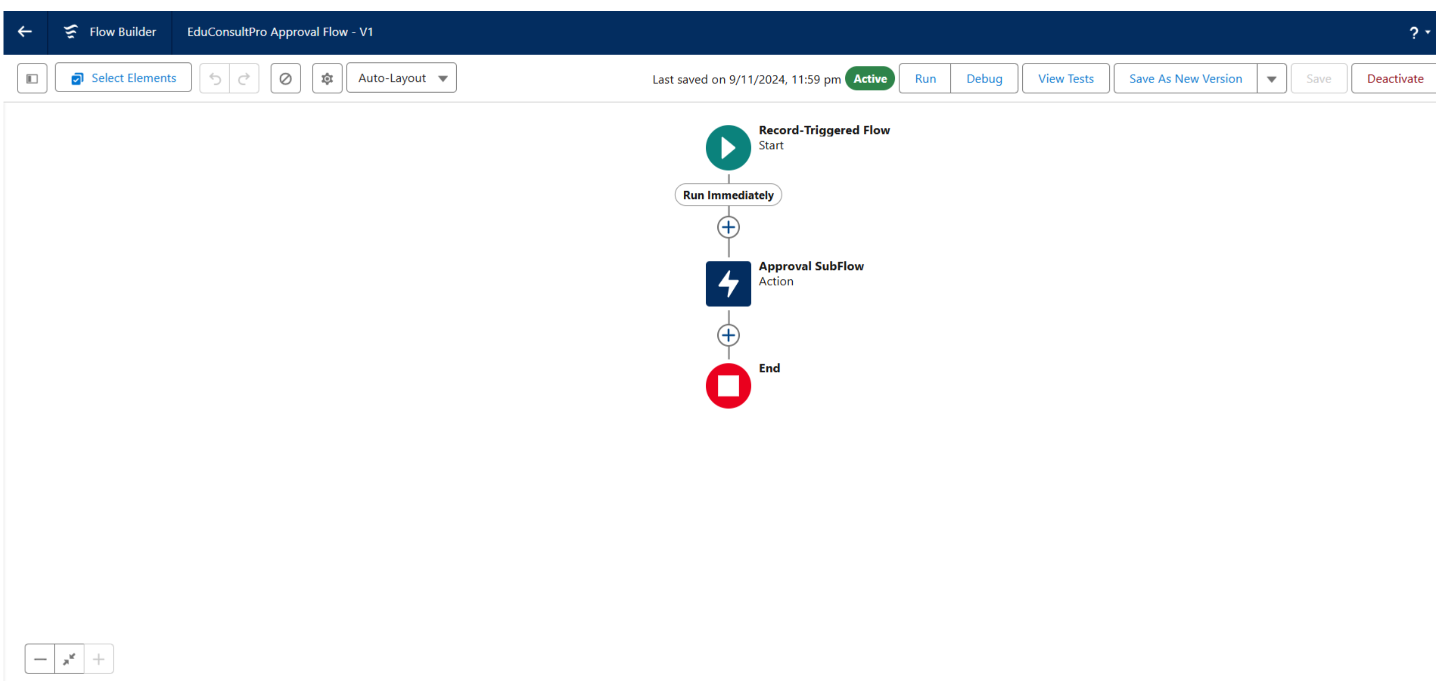
- Click on the Action element to begin configuring it.

- In the RecordId field, set the value to {!$Record.Id}. This configuration ensures the action will use the ID of the Appointment record that triggered the flow.

3. Save and Activate the Flow:

- Click Save to store your flow.

- After saving, activate the flow to implement it.



7. Creating a Screen Flow for Existing Student to Book an Appointment

7.1 Add Screen Element

1. Navigate to Flow Builder:

   - Access Setup by clicking the gear icon in the upper right corner.

   - Use the Quick Find box to search for Flow Builder and select it.

2. Create a New Flow:

   - Click New Flow.

   - Choose Screen Flow from the available flow types.

   - Click Create to start building the flow.

3. Add a Screen Element:

   - Drag a Screen element from the left sidebar onto the canvas.

4. Configure the Screen Element:

   - Screen Label: Provide a label like "Student Registration Screen".

   - Add Text Components:

     - Drag and drop two Text components onto the screen element.

     - Configure each text component by labeling them (e.g., "First Name" and "Last Name").

     - You can mark these as required fields based on your use case.

7.2 Add Get Record Element

1. Drag a Get Records Element:

- In the Flow Builder, drag the Get Records element and place it after the Screen element.

2. Configure the Get Record Element:

- Label: Enter Get Rec.

-Object: Select Student from the dropdown.

- Condition Requirements: Choose All Conditions Are Met (AND).

3. Define the Conditions:

- Field: Select Student Name.

- Operator: Choose Equals.

- Value: Set to {!Enter_Student_Name} (from the screen component).

- Field: Select Email_c.

- Operator: Choose Equals.

- Value: Set to {!Enter_Student_Email} (from the screen component).

4. Configure Record Output:

- How Many Records to Store: Choose Only the first record if expecting a single match.

- Store Record Data: Select whether to store the record's fields in a variable or use it directly in your flow.

5. Save the Get Record Element: Click Done to save the configuration.

7.3 Add Decision Element

1. Add Display Screen:

   - Drag a Screen element labeled Display Student Details and include the necessary fields.

2. Add a Decision Element:

   - Drag a Decision element and place it after the Display Student Details screen.

3. Configure the Decision Element:

   - Label: Enter Appointment or Case.

4. Define the Outcome for Appointment:

   - Outcome Label: Enter Appointment.

   - Resource: Select {!How_may_I_Help_you} (variable capturing the user's selection).

   - Operator: Choose Equals.

   - Value: Enter {!Book_an_Appointment}.

5. Add Additional Outcomes for Case Options:

   - Click the + icon to add another outcome.

   - Outcome Label: Enter Case.

   - Resource: Select {!How_may_I_Help_you}.

   - Operator: Choose Equals.

   - Value: Enter {!Raise_a_Case}.

6. Save the Decision Element: Click Done.

7.4 Add Appointment Booking Screen

1. Add a Screen Element:

 - Drag a Screen element and place it after the Decision element on the Appointment path.

2. Configure the Screen Element:

 - Label: Enter Appointment Booking Screen.

3. Create a New Resource:

 - Resource Type: Select Variable.

 - API Name: Enter AppointmentRecordRes.

 - Data Type: Select Record.

 - Object: Choose Appointment.

4. Add Fields from the Appointment Object:

 - Drag necessary fields (e.g., Appointment Date, Appointment Time, Purpose, Consultant, Student Name) from the Appointment object to the screen.

5. Save the Screen Element: Click Done.

7.5 Add Get Consultant Record Element

1. Add a Get Records Element:

 - Drag a Get Records element and place it after the Appointment Booking Screen on the Appointment path.

2. Configure the Get Records Element:

   - Label: Enter Get Consultant Rec.

   - Object: Select Consultant.

3. Define the Condition Requirements:

   - Condition Requirements: Choose All Conditions Are Met (AND).

   - Field: Select Name.

   - Operator: Choose Equals.

   - Value: Set to {!AppointmentRecordRes.Consultant_Name_c}.

4. Configure Record Output:

   - How Many Records to Store: Choose Only the first record if expecting a single match.

   - Store Record Data: Select an appropriate option based on your flow requirements.

5. Save the Get Records Element: Click Done.

7.6 Create Appointment Record]

1. Add a Create Records Element:

   - Drag a Create Records element and place it after the Get Consultant Rec element.

2. Configure the Create Records Element:

- Label: Enter Create Appointment.

- Configure the fields and values based on the details captured in the previous steps.

7.8 Add SubFlow Element

1. Drag a SubFlow Element:

   - Place it after the Decision element on the Case path.

2. Configure the SubFlow Element:

   - Label: Enter Create Student Case.

   -Flow: Search for and select the subflow named Create a Case.

3. Save the Flow:

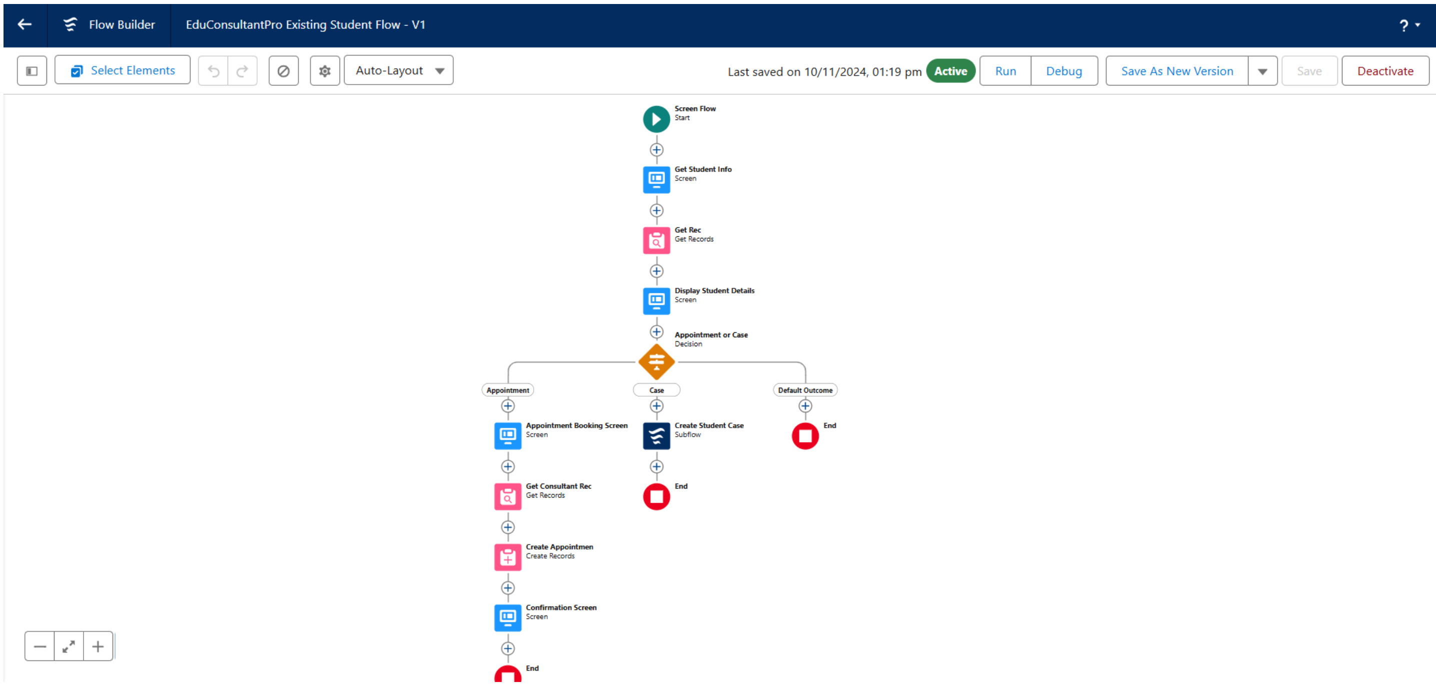
   - Click Save.

     Flow Label: Enter EduConsultantPro Existing Student Flow.

   - API Name: This will auto-populate based on the flow label.

4. Activate the Flow:

   - Click Activate to make the flow active.


Flow Builder
EduConsultantPro Existing Student Flow - V1
Select Elements
Auto-Layout
Last saved on 10/11/2024, 01:19 pm
Active
Run
Debug
Save As New Version
Save
Deactivate
Screen Flow
Start
Get Student Info
Screen
Get Rec
Get Records
Display Student Details
Screen
Appointment or Case
Decision
Appointment
Case
Default Outcome
Appointment Booking Screen
Screen
Create Student Case
Subflow
End
Get Consultant Rec
Get Records
End
Create Appointmen
Create Records
Confirmation Screen
Screen
End

8. Creating a Screen Flow to Combine All Flows in One Place

8.1 Add Welcome Screen

1. Add a Screen Element:

   - Drag a Screen element from the left sidebar onto the canvas.

   - Label: Enter Welcome Screen.

2. Add Display Text Component:

   - From the left panel, drag the Display Text component to the main panel.

   - Label: Enter SuccessMessage.

3. Add Welcome Message:

   - In the Display Text component, paste the following text:

Welcome to EduConsultantPro!

Your premier destination for education and immigration solutions!

We guide you with expertise and personalized support, covering all aspects of your educational and immigration journeys.

Our seasoned consultants help you achieve your goals efficiently, from selecting the right institution to navigating visa procedures.

We believe in fostering inclusive communities and unlocking your potential.

Welcome to EduConsultantPro - where your aspirations meet our expertise. Let's embark on this journey together!

4. Save the Display Text Component: Click Done.

5. Save the Screen Element: Click Done to save the Welcome Screen.

8.2 Add Existing or New Student Confirmation Screen

1. Add a Screen Element:

   - Drag another Screen element onto the canvas, positioning it after the Welcome Screen.

   - Label: Enter Existing or New Student Confirmation Screen.

2. Add Radio Button Component:

   - From the left panel, drag the Radio Buttons component to the main panel.

   - Label: Enter Are you an Existing Student?

3. Add Choice Options:

   - Click Add Choice:

     - Label: Enter Yes.

     - Click Create Yes Choice.

   - Click Add Choice again:

     - Label: Enter No.

     - ClicknCreate No Choice.

4. Save the Radio Button Component: Click Done.

5. Save the Screen Element: Click Done to save the Existing or New Student Confirmation Screen.

8.3 Add Decision Element

1. Add a Decision Element:

   - Drag a Decision element from the left sidebar onto the canvas and place it after the Existing or New Student Confirmation Screen.

- Label: Enter Decision 1.

2. Configure Outcome for Existing Student:

   - Outcome Label: Enter If Existing Student.

   - Condition:

     - Resource: Select {!Are_you_a_Existing_Student} (from the radio button component).

     - Operator: Choose Equals.

     - Value: Enter Yes.

3. Configure Outcome for New Student:

   - Outcome Label: Enter If New Student.

   - Condition:

     - Resource: Select {!Are_you_a_Existing_Student}.

     - Operator: Choose Equals.

     - Value: Enter No.

4. Save the Decision Element: Click Done.

8.4 Add Subflow Element for Existing Student

1. Add a Subflow Element:

   - Drag a Subflow element onto the canvas, placing it on the If Existing Student path.

   - Label: Enter Existing Student Flow.

2. Configure the Subflow:

   - Subflow Selection: Search for and select EduConsultantPro Existing Student Flow.

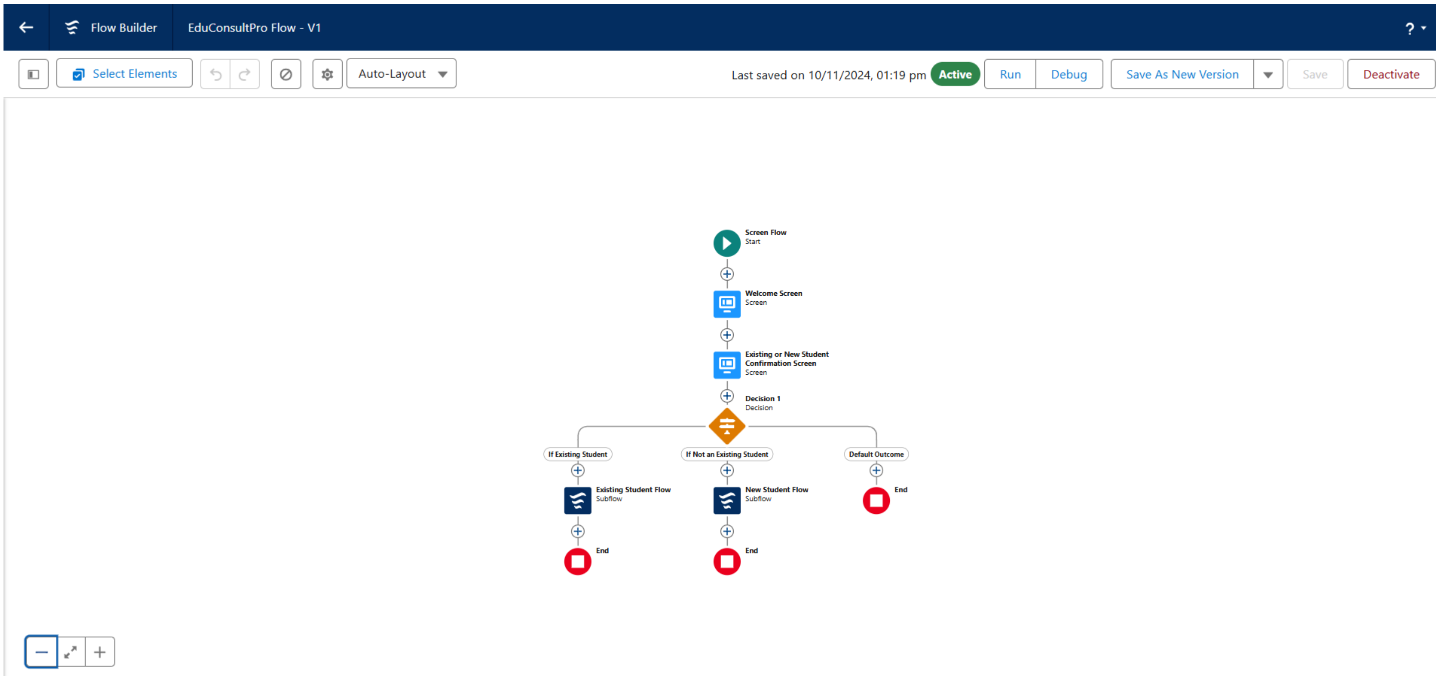
3. Save the Subflow Element: Click Done to save the Existing Student Flow subflow element.

8.5 Add Subflow Element for New Student

1. Add a Subflow Element:
   - Drag another Subflow element and position it on the If New Student path.
   - Label: Enter New Student Flow.
2. Configure the Subflow:
   - Subflow Selection: Search for and select EduConsultantPro Student Flow.
3. Save the Subflow Element: Click Done to save the New Student Flow subflow element.

Final Save and Activation

1. Save the Entire Flow:
   - Flow Label: Enter EduConsultPro Flow.
2. Activate the Flow:
   - After saving, click Activate to make the flow live.



Flow Builder
EduConsultPro Flow - V1
Select Elements
Auto-Layout
Last saved on 10/11/2024, 01:19 pm
Active
Run
Debug
Save As New Version
Save
Deactivate
Screen Flow
Start
Welcome Screen
Screen
Existing or New Student Confirmation Screen
Screen
Decision 1
Decision
If Existing Student
If Not an Existing Student
Default Outcome
Existing Student Flow
Subflow
New Student Flow
Subflow
End
End
End

9. Creating a Lightning App Page

1. Create a New Lightning Home Page

1. Access Setup:

   - Click on the gear icon located in the top right corner.

2. Open App Builder:

   - In the Quick Find box, type App Builder and select Lightning App Builder.

3. Create New Page:

   - Click New, select Home Page as the type of page, and then click Next.

4. Page Naming:

   - Enter EduConsultPro Home Page as the name and click Next.

2. Configure the Home Page

1. Add Components:

   - Drag and drop essential components into the preferred layout. Suggestions include:

     - Today's Tasks and Recent Items to monitor activities.

     - Reports and List Viewsfor tracking students or appointments.

   - Add the EduConsultPro welcome message at the top for visibility.

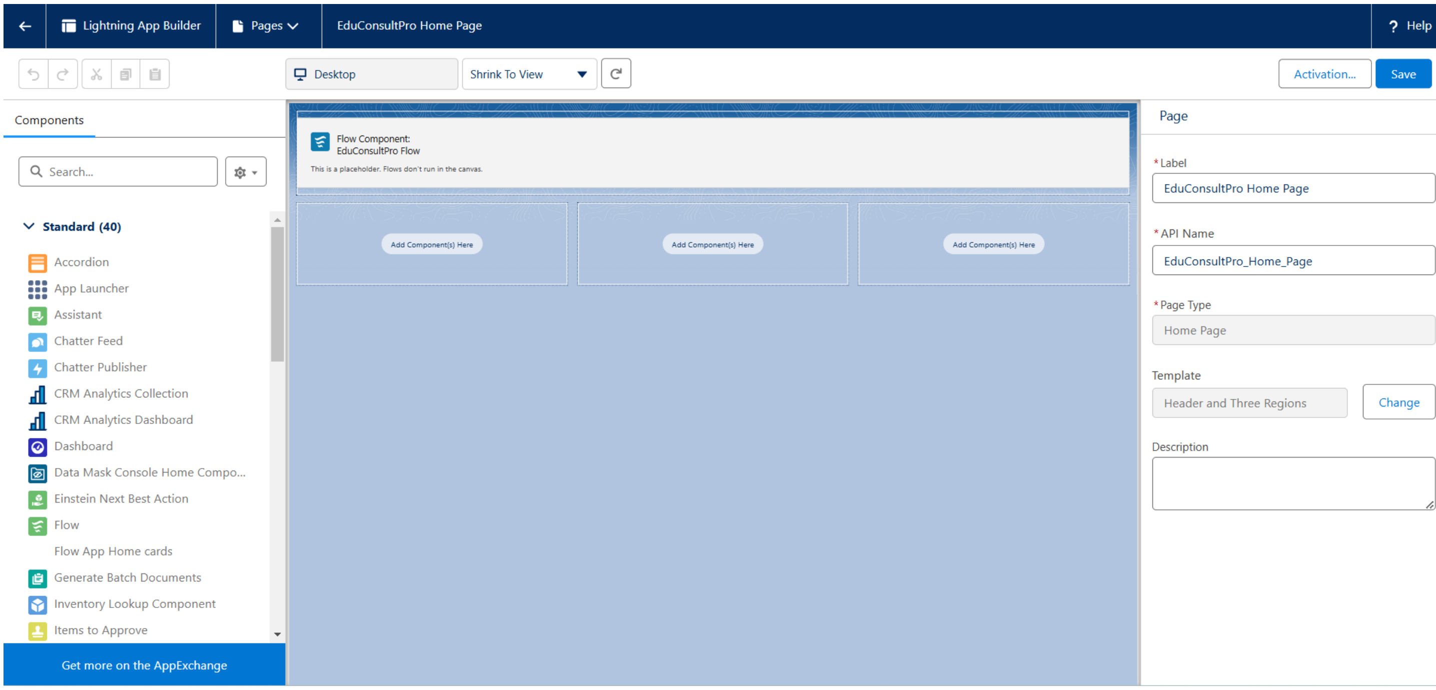
     - Place consultant-related components (e.g., Today's Events or Top Consultants) in the sidebar.

3. Save and Activate the Page

1. Save Changes:
   - Click Save once all components are arranged.
2. Activate the Page:
   - Click Activate in the upper right corner of the editor.
   - Choose App and Profile Assignment.

4. Assign to Apps and Profiles

1. Select Apps:
   - Choose the Sales app, then click Next.
2. Choose Profiles:
   - Scroll to select the System Administrator profile.
   - Click Next to confirm.
3. Review and Save:
   - Review the assignments, then click Save to finalize.


Lightning App Builder
Pages
EduConsultPro Home Page
Help
Desktop
Shrink To View
Activation...
Save
Components
Search...
Standard (40)
Accordion
App Launcher
Assistant
Chatter Feed
Chatter Publisher
CRM Analytics Collection
CRM Analytics Dashboard
Dashboard
Data Mask Console Home Compo...
Einstein Next Best Action
Flow
Flow App Home cards
Generate Batch Documents
Inventory Lookup Component
Items to Approve
Get more on the AppExchange
Flow Component:
EduConsultPro Flow
This is a placeholder. Flows don't run in the canvas.
Add Component(s) Here
Add Component(s) Here
Add Component(s) Here
Page
* Label
EduConsultPro Home Page
* API Name
EduConsultPro_Home_Page
* Page Type
Home Page
Template
Header and Three Regions
Change
Description

conclusion:

In conclusion, creating a customized **EduConsultPro Home Page** in Salesforce provides an organized and intuitive interface for managing educational and consulting activities. By following these steps—setting up in Lightning App Builder, adding essential components, and assigning the page to the appropriate apps and profiles—you ensure a streamlined experience tailored to user needs. This page serves as a valuable tool for efficient task management, improved visibility, and quick access to relevant resources, supporting consultants and administrators in delivering exceptional service.

BY-

SI-7356-1731255450

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