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Project Overview: CRM Application for EduConsultPro Institute

Institution: EduConsultPro Institute
Project Title: Salesforce CRM Implementation for Admission Management

Introduction

EduConsultPro Institute is a leading educational institution offering a diverse range of courses and programs. As the number of prospective students continues to grow, the institute faces challenges in managing the admission process, student inquiries, and expert consulting services efficiently.

Objective

To address these challenges, EduConsultPro Institute aims to leverage Salesforce CRM to streamline the admission process, enhance student engagement, and improve overall operational efficiency for admissions staff.

Use Case Focus

The primary focus of this project is the admission process for prospective students interested in enrolling in courses and programs offered by EduConsultPro Institute. The goals include:

- **Seamless Experience:** Provide a transparent and user-friendly application experience for prospective students.
- **Efficiency for Admissions Staff:** Enable admissions staff to efficiently review and process applications, manage student inquiries, and handle case management.

Project Requirements: CRM Application for EduConsultPro Institute

1. Admission Application Management

- **Application Access:** Prospective students can access the admission form via the website/portal.
- **Data Collection:** Form collects personal details, academic history, and qualifications.
- **Submission & Storage:** Applications are stored in Salesforce CRM.
- **Notifications:** Automated email confirmations sent to students upon submission.
- **Reporting:** Staff can generate reports on application metrics, acceptance rates, and enrollment trends.

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2. Approval Process

- **Workflow:** Implement approval process for consulting requests.
- **Notifications:** Email alerts for students on approval/rejection.
- **Automatic Submission:** Requests auto-submit upon creation.

3. Consulting Services Management

- **Request Access:** Students can request consulting services online.
- **Data Capture:** Request form collects student details and preferences.
- **Management:** Requests stored in Salesforce; consultants receive notifications.
- **Appointment Scheduling:** Facilitated within Salesforce, tracking status (scheduled, completed, canceled).

4. Immigration Case Management

- **Initiation:** Students can start cases via phone, email, or web.
- **Data Capture:** Submission form collects case details.
- **Recording:** Cases stored in Salesforce CRM; agents notified of new cases.
- **Tracking:** Agents can view, process, and track case status (open, in progress, closed).
- **Document Management:** Integrated tools for case processing and communication.

Create Remaining Objects in Salesforce

1. **Object Manager:** Go to **Setup** > **Object Manager**.
2. **Create from Spreadsheet:** Click **Create Object** from Spreadsheet.
3. **Download & Upload Sheets:**
    - **Consultant:** Download the **Consultant** spreadsheet and upload it.
    - **Student:** Download the **Student** spreadsheet and upload it.
    - **Appointment:** Download the **Appointment** spreadsheet and upload it.
4. **Map Fields:** Map fields for each object as needed.
5. **Upload:** Click **Upload** to create each object.
6. **Verify:** Check Object Manager for the new objects (Consultant, Student, Appointment).

Create Relationships and Registration Object

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1. **Create Lookups:**
   - **Appointment & Student:**
     - Go to the **Object Manager**, select **Appointment**, and create a **Lookup Relationship** to the **Student** object.
   - **Appointment & Consultant:**
     - In **Appointment**, create a **Lookup Relationship** to the **Consultant** object.
2. **Create Registration Object:**
   - Go to **Object Manager** and click on **Create Object**.
   - Name the object **Registration** to store student and course details.
3. **Create Lookup Relationship:**
   - **Student & Case:**
     - In the **Case** object, create a **Lookup Relationship** to the **Student** object to manage student queries related to immigration or visa applications.
4. **Data Model:**
   - Ensure the data model reflects the relationships:
     - **Appointment → Student**
     - **Appointment → Consultant**
     - **Registration** for student-course details
     - **Case → Student**

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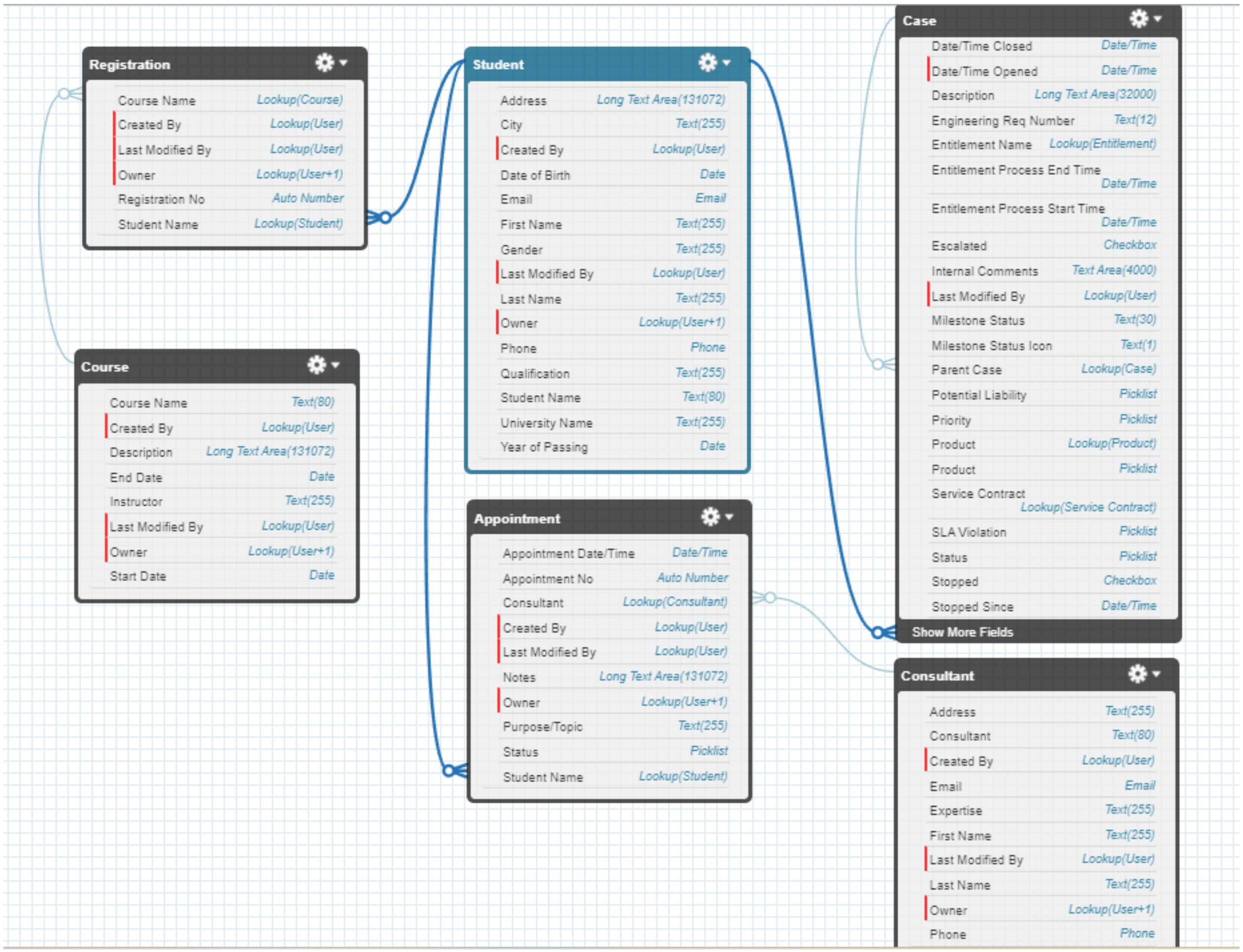

5. **Create Tabs:**
   - Go to **Setup** > **Tabs**.
   - Create tabs for each object: **Course**, **Consultant**, **Student**, **Appointment**, **Registration**, and **Case**.

Configure the Case Object

1. **Object Manager:** Go to **Setup** > **Object Manager**.
2. **Edit Case Object:** Select **Case**.
3. **Type Field:**
   - Go to **Fields & Relationships**.
   - Edit **Type** and add:
     - Immigration
     - Visa Application
4. **Status Field:**
   - Edit **Status** and add:

- Open
- In-progress

5. **Save Changes**

Here's a concise guide to create a Lightning App in Salesforce:

Create a Lightning App

1. **Access Setup:**
   - Go to **Setup** and search for **App Manager** in the Quick Find box.
2. **New Lightning App:**
   - Click on **New Lightning App**.
3. **App Name:**
   - Enter the app name: **EduConsultPro**.
   - Click **Next** through the prompts.
4. **Add Items:**
   - From **Available Items**, add:
     - Home
     - Students
     - Courses
     - Consultants
     - Appointments
     - Registrations
     - Cases
   - Move them to **Selected Items**.
5. **Add Profiles:**
   - From **Available Profiles**, add **System Administrator** to **Selected Profiles**.
6. **Save & Finish:**
   - Click **Save & Finish**.

Create a ScreenFlow for Student Admission Application process.

Add a Screen Element in Flow Builder

1. **Access Flow Builder:**
   - Go to **Setup** and enter **Flow Builder** in the Quick Find box.

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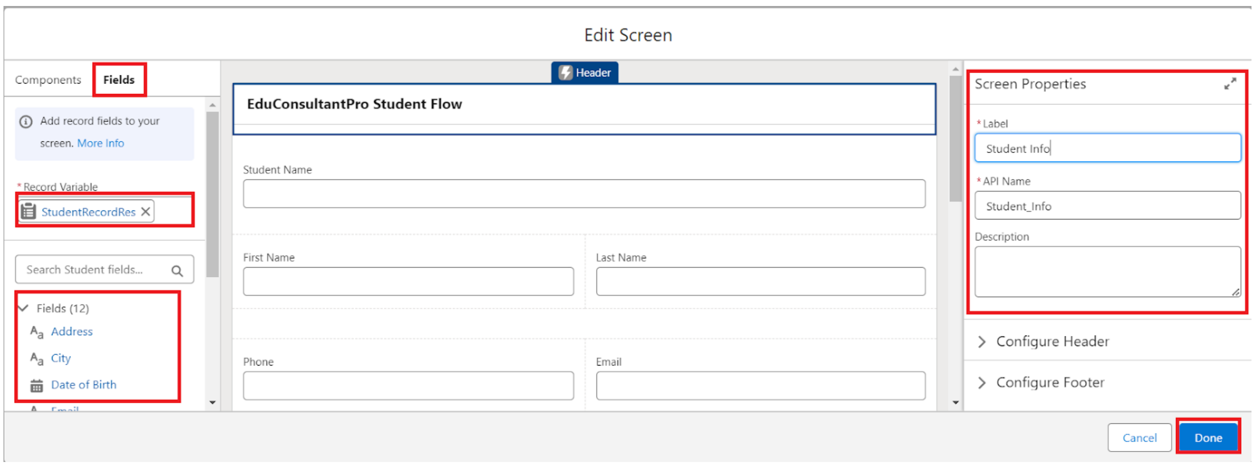
- Select **New Flow** and choose **Screen Flow**.

2. **Add Screen Element:**
   - Drag and drop a **Screen** element onto the flow canvas.
3. **Configure Screen Properties:**
   - In the **Screen Properties** pane, set the **Label** to **Student Info**.
4. **Create Record Variable:**
   - Click on **Fields**, then select the record variable input option.
   - Click **Create New Resource** and name it **StudentRecordRes**.
5. **Add Student Fields:**
   - Drag all necessary fields from the **Student** object into the screen to collect student information (e.g., Name, Email, Phone, Academic History).
6. **Save Changes:**
   - Ensure all changes are saved.



Create Student Record using Create Element

1. **Add Create Element:**
   - Drag a **Create** element onto the flow canvas after the **Student Info** Screen element.
2. **Configure Create Element:**
   - Set the **Label** to **Create Student Record**.
3. **Set Record Creation Options:**
   - Under **How many records to create**, select **One**.
   - For **How to set the record fields**, choose **Use all values from a record**.
4. **Select Record Variable:**
   - Under **Create a record from these values**, select the record variable resource **StudentRecordRes** that you created in the Student Info screen.

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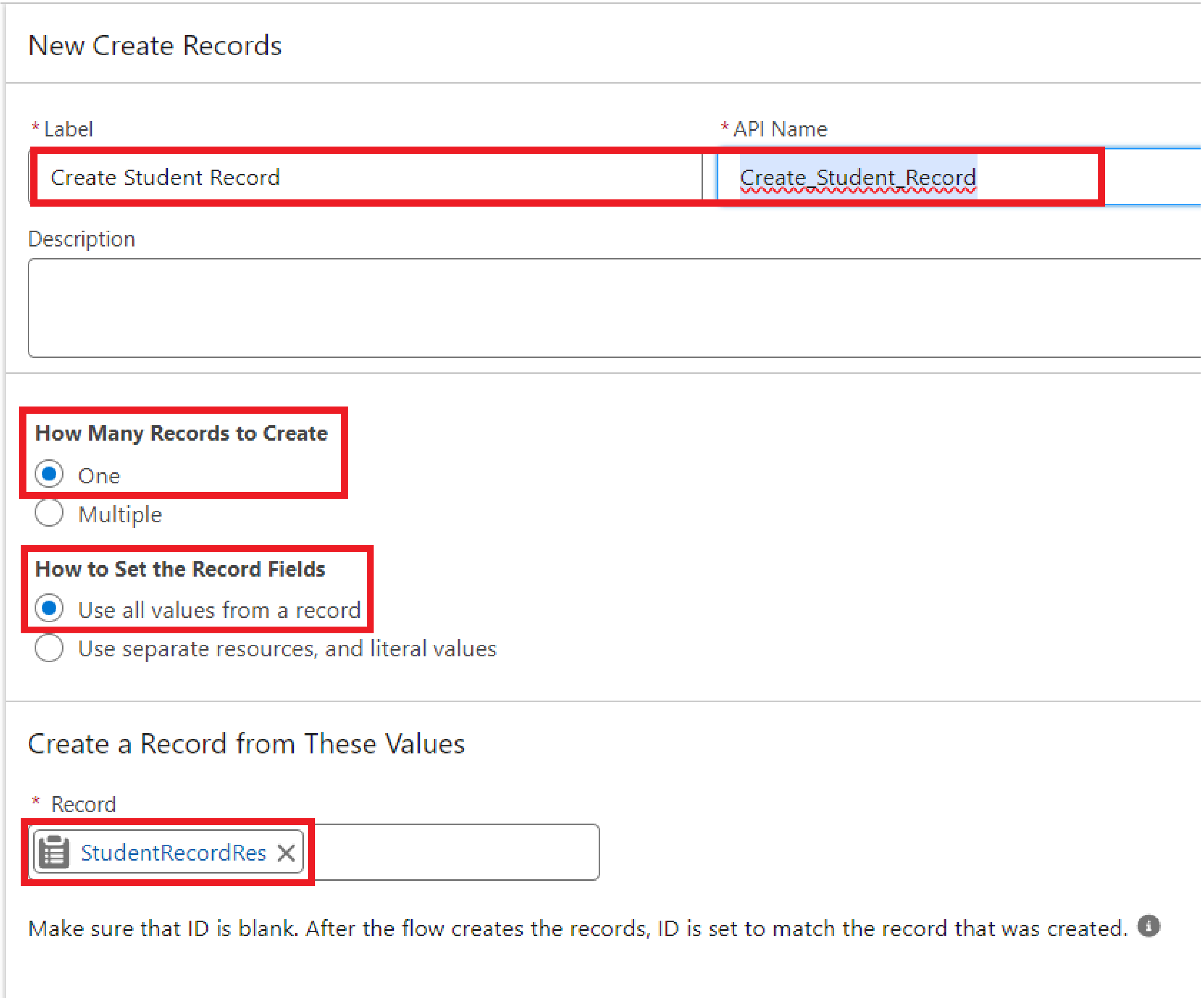
5. **Save Changes:**
   - Ensure all changes are saved.



Add Course Screen Element

1. **Add Screen Element:**
   - Drag a **Screen** element onto the flow canvas after the **Create Student Record** element.
   - Label it as **Course Screen**.
2. **Add Picklist Component:**
   - From the left panel, drag a **Picklist** component onto the screen.
   - Set the label to **Select Course**.
3. **Add Choices:**
   - Under **Choices**, enter the following options one by one:

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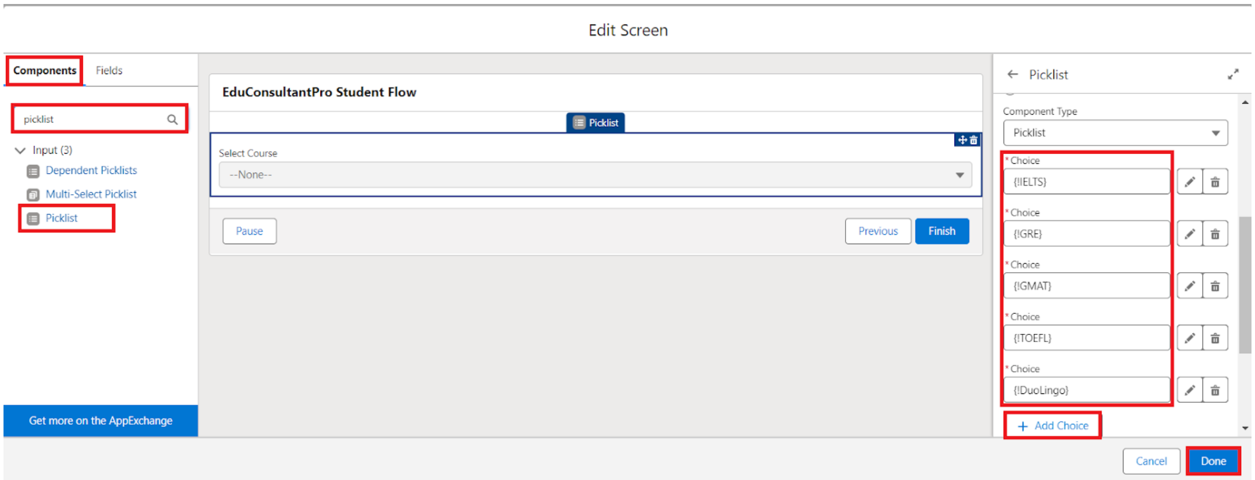
- **IELTS** (This creates a variable named IELTS)
- **GRE**
- **GMAT**
- **Duolingo**
- **TOEFL**



4. **Save Changes:**
   - Ensure all changes are saved.

Add Decision Element

1. **Add Decision Element:**
   - Drag a **Decision** element onto the flow canvas after the **Select Course Screen** element.
   - Label it as **Selecting Course**.
2. **Configure Outcomes:**
   - Under **Outcomes**, set the first outcome:
     - **Label:** Selected IELTS
     - **Resource:** Select_Course (the picklist from the Select Course Screen)
     - **Operator:** Equals
     - **Value:** IELTS
3. **Add Additional Outcomes:**
   - Click the **+** icon to add new outcomes for the remaining options:
     - **Label:** Selected GRE
       - Value: GRE
     - **Label:** Selected GMAT
       - Value: GMAT

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College: Institute of technology and management, Gwalior
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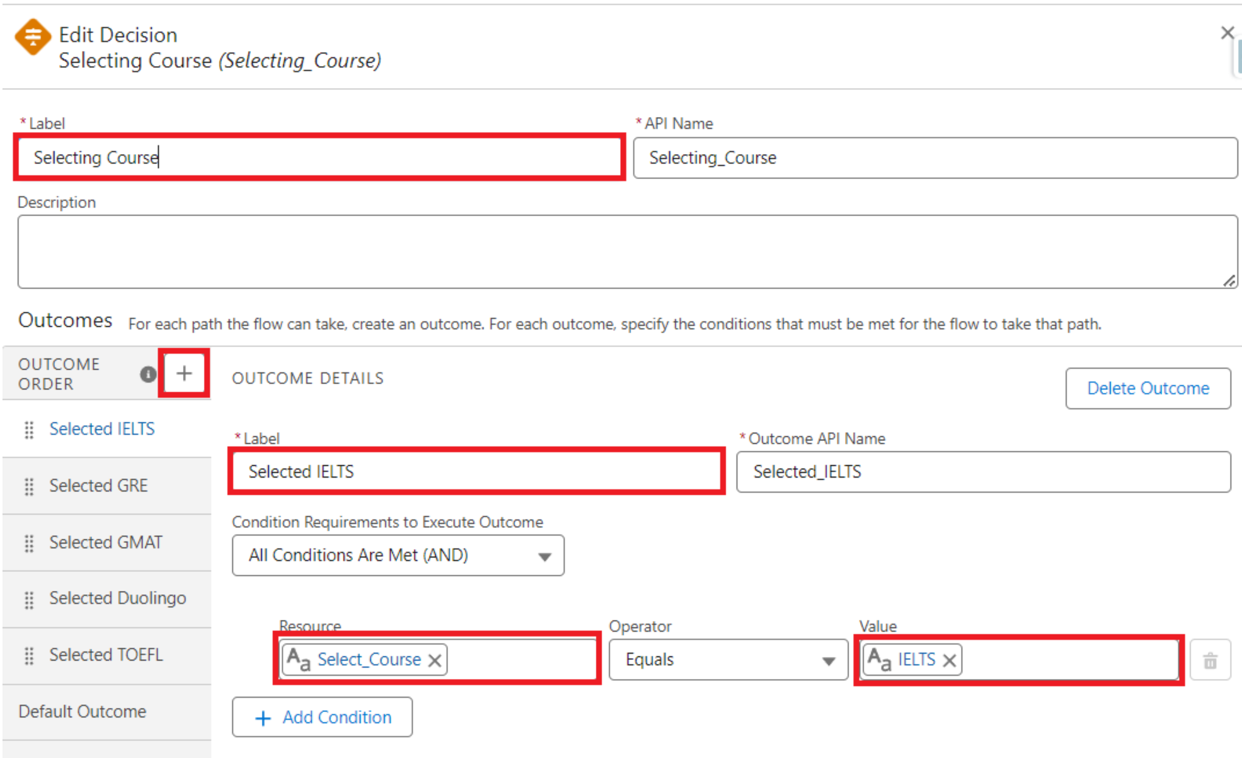
- **Label:** Selected Duolingo
    - Value: Duolingo
- **Label:** Selected TOEFL
    - Value: TOEFL



4. **Complete Configuration:**
    - Click **Done** to save the decision outcomes.

Add GET Record Element

1. **Add GET Record Element:**
    - Drag a **Get Records** element onto the flow canvas under the **Selected IELTS** path.
    - Label it as **Get IELTS Rec**.
2. **Configure GET Record Element:**
    - **Select Object:** Course
    - **Condition Requirement:** All Conditions are Met (AND)
    - **Field:** Course Name
    - **Operator:** Equals
    - **Value:** {!Select_Course}
3. **Repeat for Other Paths:**
    - For each remaining course path, add a new GET Record element:

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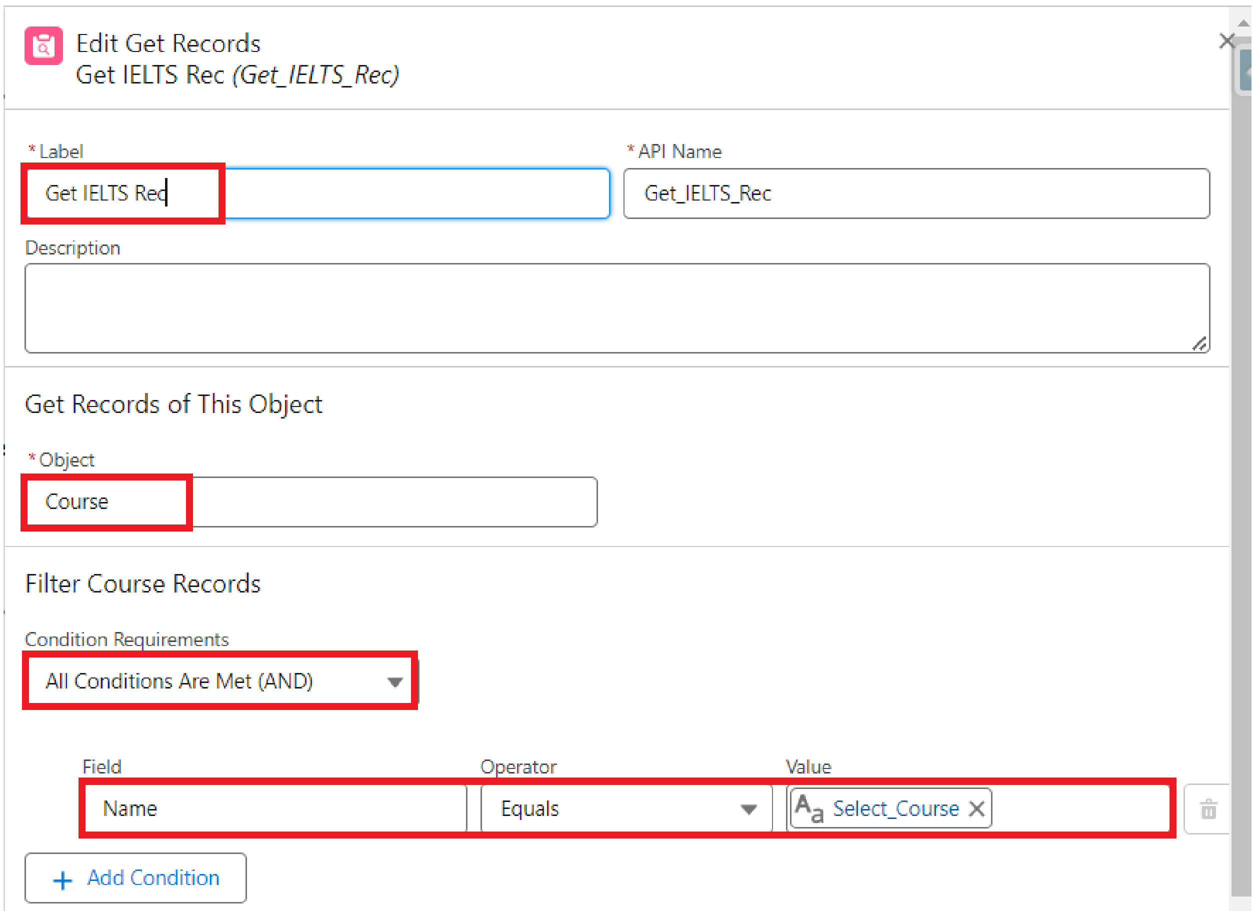
College: Institute of technology and management, Gwalior
Email: milantiwari2003@gmail.com

- **Get GRE Rec** for GRE
- **Get GMAT Rec** for GMAT
- **Get Duolingo Rec** for Duolingo
- **Get TOEFL Rec** for TOEFL

- Use the same configuration as above, adjusting the label and Value for each course accordingly.



4. **Save Changes:**
   - Ensure all changes are saved.

Create Registration Record using Create Records Element

1. **Add Create Records Element:**
   - Drag a **Create Records** element onto the flow canvas after the **Get IELTS Rec** element.
   - Label it as **Create IELTS Registration Rec**.
2. **Configure Create Records Element:**
   - **How many records to create:** One

Name: Milan Tiwari Roll No. 0905CS211097
College: Institute of technology and management, Gwalior
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- **How to set the record fields:** Use separate resources and literal values

3. **Select Object:**
    - **Object:** Registration
4. **Set Field Values:**
    - **Field:** Course_Name__c
        - **Value:** {!Get_IELTS_Rec.Id}
    - **Field:** Student_Name__c
        - **Value:** {!StudentRecordRes.Id}
5. **Repeat for Other Paths:**
    - For each remaining course path, add a new Create Records element:
        - **Create GRE Registration Rec** for GRE
        - **Create GMAT Registration Rec** for GMAT
        - **Create Duolingo Registration Rec** for Duolingo
        - **Create TOEFL Registration Rec** for TOEFL
    - Use the same configuration as above, adjusting the label and Course_Name__c value for each course path:
        - **Value:** {!Get_GRE_Rec.Id}, {!Get_GMAT_Rec.Id}, {!Get_Duolingo_Rec.Id}, {!Get_TOEFL_Rec.Id} respectively.

Name: Milan Tiwari Roll No. 0905CS211097
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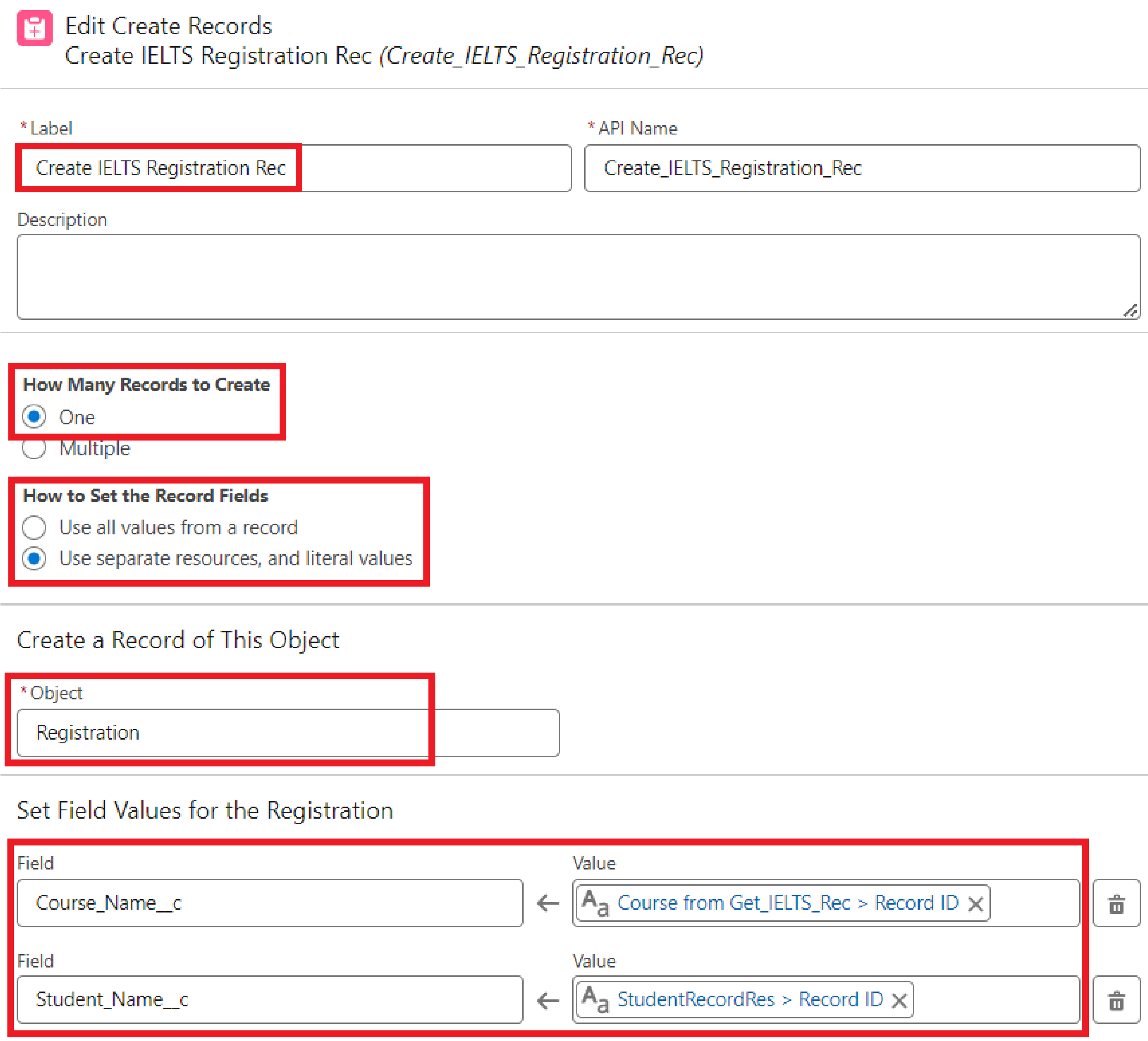

6. **Save Changes:**
    - Ensure all changes are saved.

1. **Email Body Template:**
    - Click **toggle toolbox**, then **New Resource** > **Text Template**.
    - **API Name:**`StuRegistrationEmailTextTempBody`
    - **View as:** Plain text.
    - **Body:** Paste the welcome message (as provided).
    - Click **Done**.
2. **Email Subject Template:**
    - Repeat the above steps.
    - **API Name:**`StuRegistrationEmailTextTempSub`

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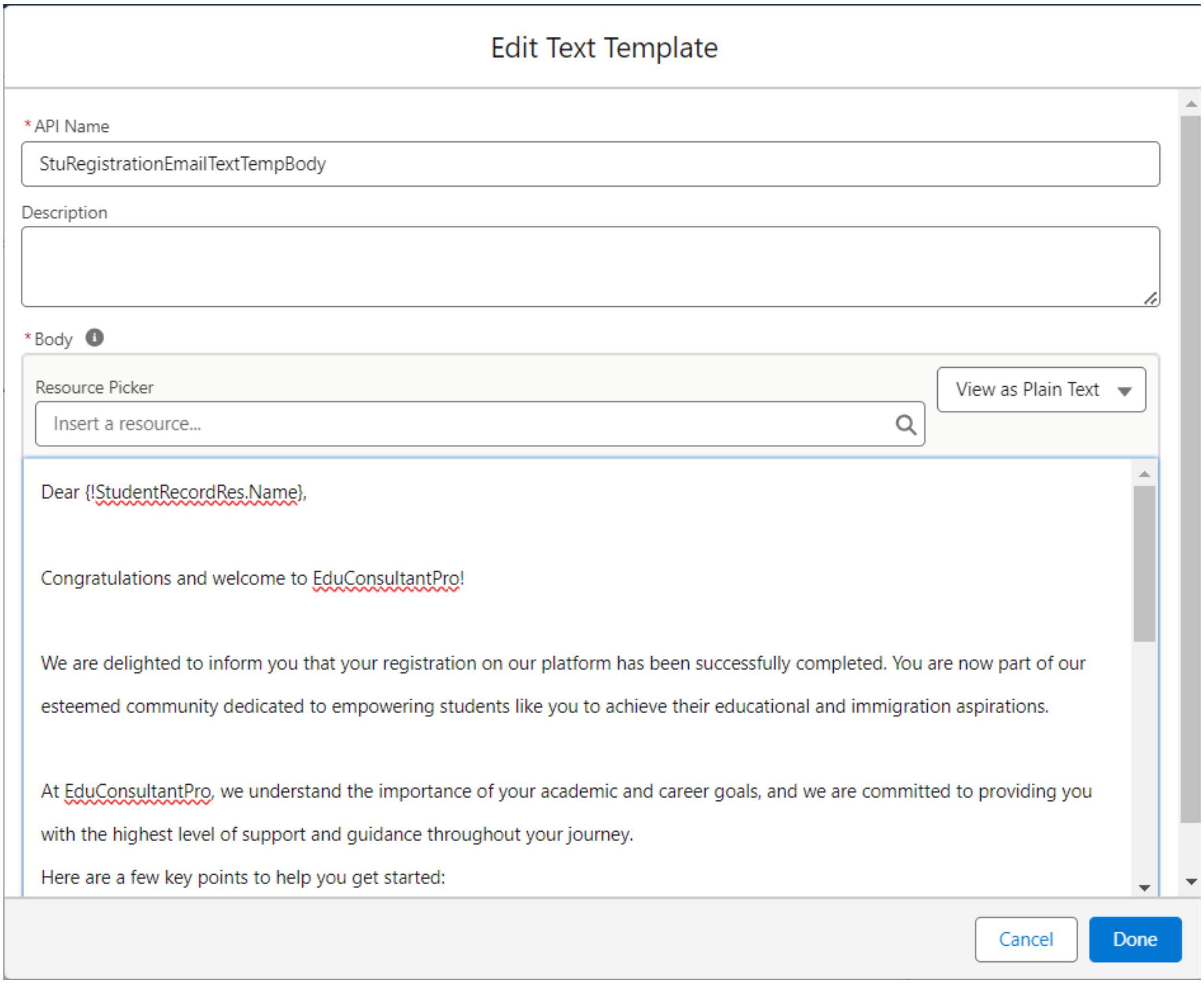
- **Body:** Enter the subject (e.g., "Welcome to EduConsultantPro!").
- Click **Done**.



Add Action Element to Send Email

1. **Add Action Element:**
    - Drag an **Action** element onto the flow canvas after all the Decision paths.
    - Label it as **Send Email to Student**.
2. **Set Input Values:**
    - Under **Set input values for selected action**, configure the following:
        - **Body:** `{!StuRegistrationEmailTextTempBody}`
        - **Recipient Address List:** `{!StudentRecordRes.Email__c}`
        - **Subject:** `{!StuRegistrationEmailTextTempSub}`

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College: Institute of technology and management, Gwalior
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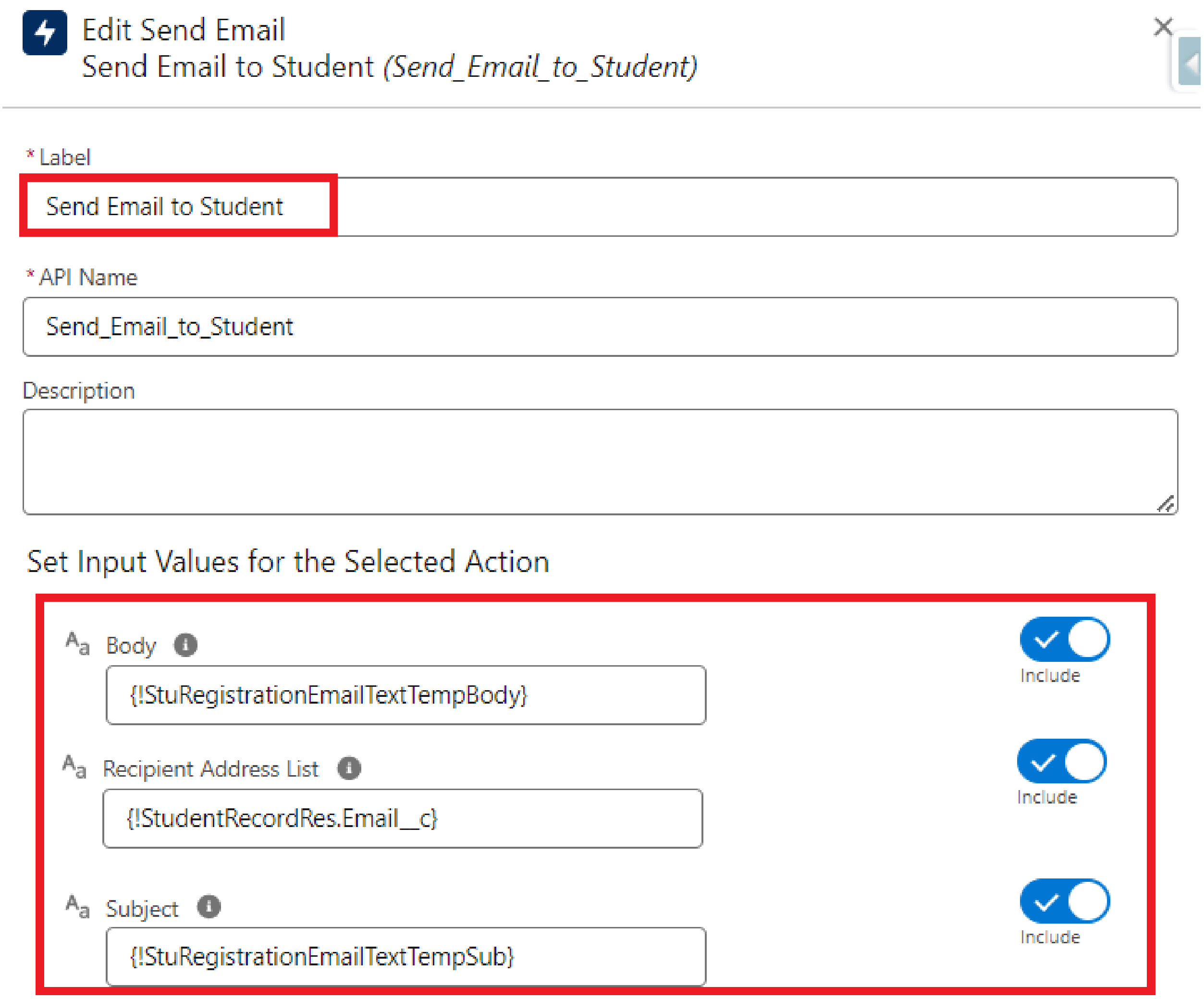

3. **Save Changes:**
    - Ensure all changes are saved.

Add Success Screen Element

1. **Add Screen Element:**
    - Drag a **Screen** element onto the flow canvas after the **Send Email to Student** Action Element.
    - Label it as **Success Screen**.
2. **Add Display Text Component:**
    - Search for **Display Text** in the left panel and drag it to the main panel.
    - Label it **SuccessMessage**.
3. **Set Resource Picker:**

Dear {!StudentRecordRes.Name}, Congratulations and welcome to EduConsultantPro!

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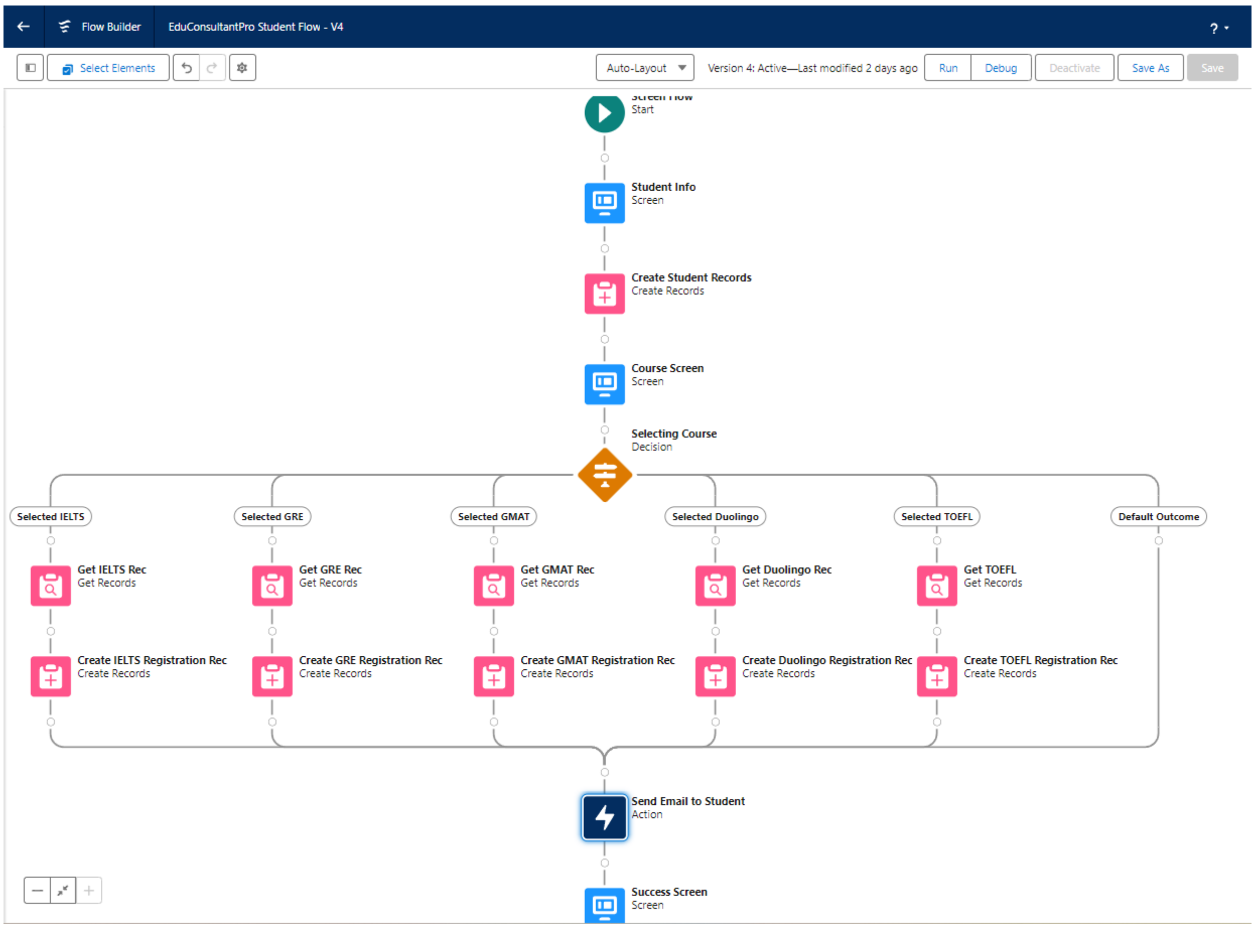
College: Institute of technology and management, Gwalior
Email: milantiwari2003@gmail.com
We are delighted to inform you that your registration on our platform has been successfully completed. You are now part of our esteemed community dedicated to empowering students like you to achieve their educational and immigration aspirations. Your registration details have been sent through mail; kindly check it once. Thank you.

Finalize:

- Click **Done**.
- Save the flow and name it **EduConsultPro Student Flow**.



Create Users

Create a user with a Standard platform user profile.

Create New User

1. **Access User Setup:**
   - Go to **Setup**.

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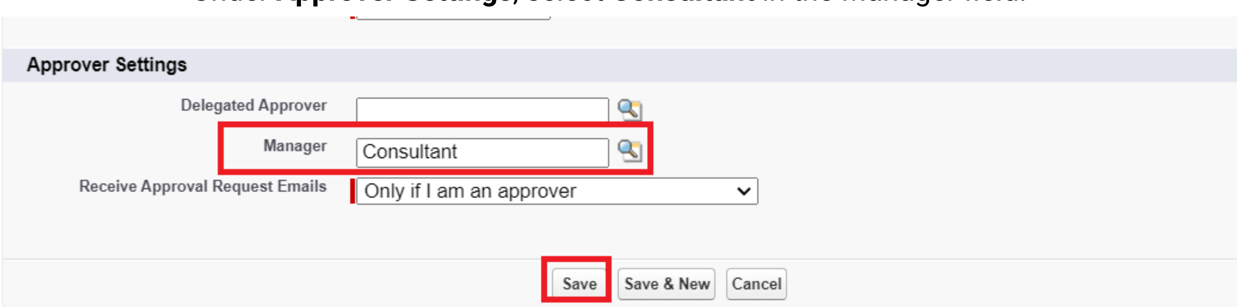
- Navigate to **Administration** > **Users**.

2. **Create New User:**
    - Click on **New User**.
3. **Fill in User Details:**
    - **Last Name:** Consultant
    - **License:** Salesforce Platform
    - **Profile:** Standard Platform User
    - Fill in all mandatory fields.
4. **Save:**
    - Click **Save** to create the user.

Configure User Settings

1. **Access User Settings:**
    - Go to **Setup**.
    - Navigate to **Administration** > **Users**.
    - Click **Edit** next to your name.
2. **Update Approver Settings:**
    - Scroll down to the bottom.
    - Under **Approver Settings**, select **Consultant** in the Manager field.



3. **Save Changes:**
    - Click **Save**.

Create an Approval Process for Property Object

Create Email Templates

1. **Enable Lightning Email Templates:**
    - Go to **Setup** > **Templates** > **Lightning Email Templates** and toggle on.

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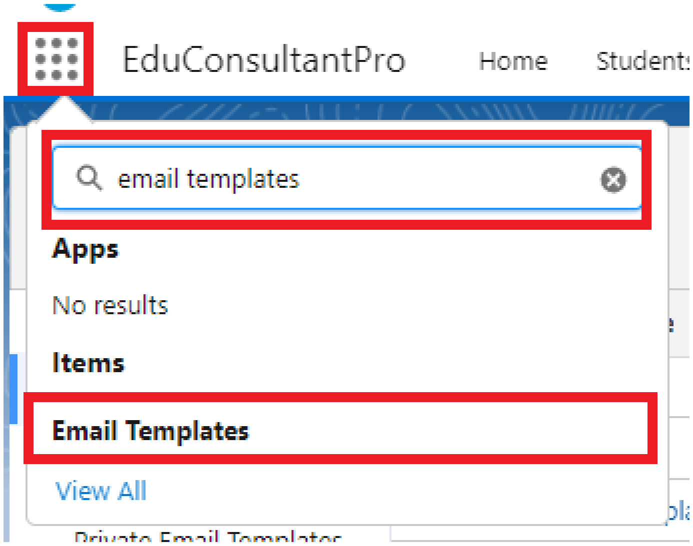
College: Institute of technology and management, Gwalior
Email: milantiwari2003@gmail.com



2. **Create Email Folder:**
   - In the **App Launcher**, search for **Email Templates** and create a new folder.
3. **Create Submission Template:**
   - Create a new email template in the folder.
   - code -

Dear {{{Appointment__c.Student_Name__c}}},

I hope this email finds you well. I'm writing to confirm our appointment on {{{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}}}

Looking forward to our meeting.

Best regards,
{{{Recipient.Name}}}
EduConsultantPro

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College: Institute of technology and management, Gwalior
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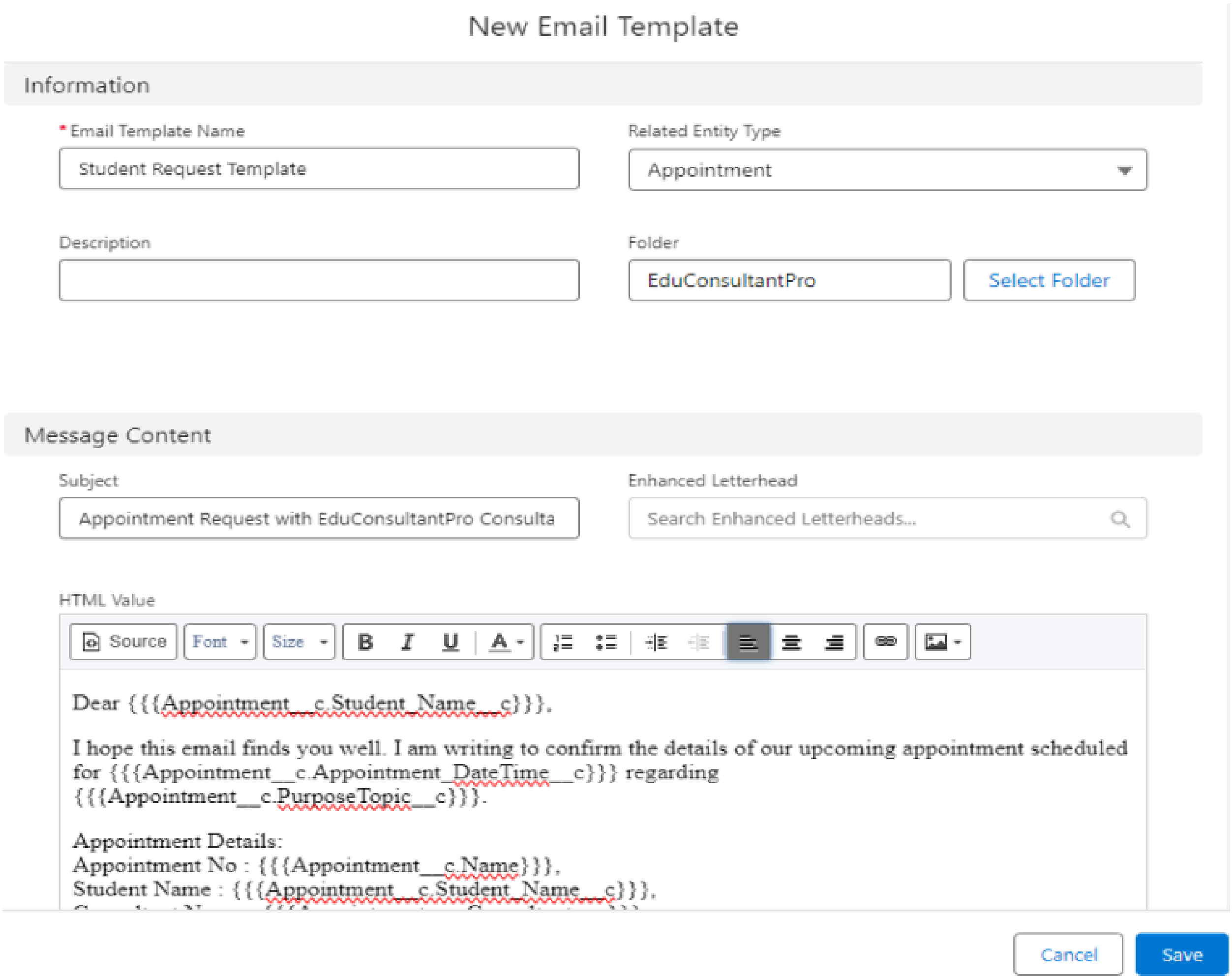
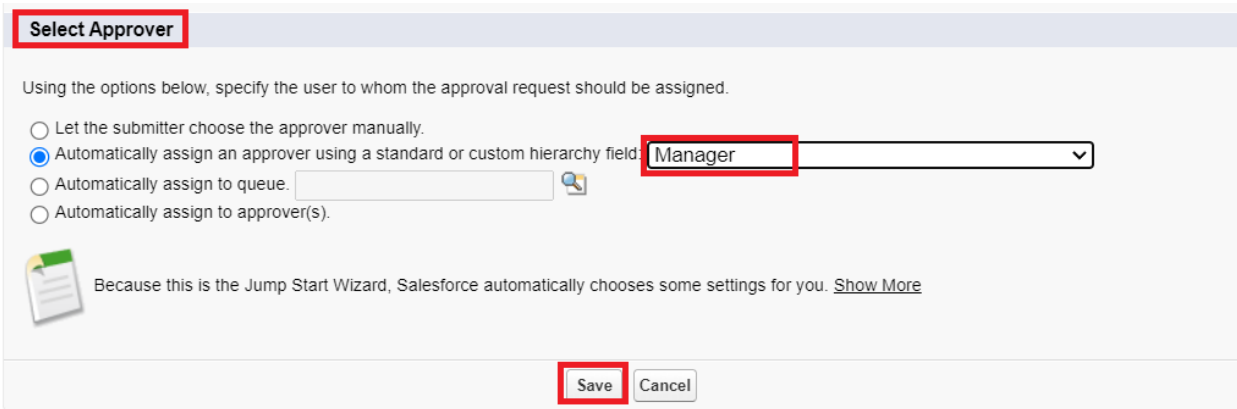


Create an Approval Process

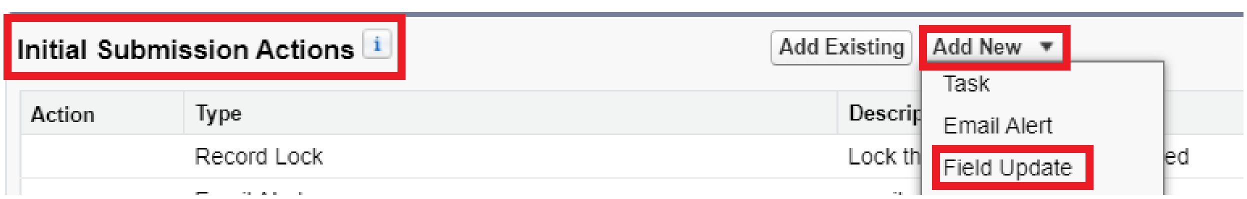
1. **Access Approval Processes:**
   - Go to **Setup** and enter **Approval** in the Quick Find box.
   - Select **Approval Processes**.
2. **Select Object:**
   - In **Manage Approval Processes For**, select **Appointment**.
   - Click **Create New Approval Process** and choose **Use Jump Start Wizard**.
3. **Configure Approval Process:**
   - **Process Name:** Appointment Approval
   - **Select Approver:** Choose **Manager** for "Automatically assign an approver using a standard or custom hierarchy field."
   - Click **Next**.
4. **Set Automated Approver:**

Name: Milan Tiwari Roll No. 0905CS211097
College: Institute of technology and management, Gwalior
Email: milantiwari2003@gmail.com

- Select **Manager** for "Automated Approver Determined By."
- Under **Record Editability Properties**, choose **Administrators OR the currently assigned approver can edit records during the approval process**.



5. **Save Approval Process:**
   - Click **Save**.
6. **View Approval Process Detail Page:**
   - Click **View Approval Process Detail Page**.
7. **Add Initial Submission Actions:**
   - Under **Initial Submission Actions**, click **Add New** > **Field Update**.
     - **Field to Update:** Appointment: Status
     - **Value:** Pending
     - **Name:** Submitted
   - Click **Done**.



8. **Add Email Alert:**
   - Click **Add New** > **Email Alert**.
     - **Description:** Submission Email Alert
     - **Email Template:** Submission Template
     - **Recipient Type:** Select your Name.
   - Click **Done**.
9. **Repeat for Final Approval and Final Rejection Actions:**
   - Follow steps 7 and 8 for Final Approval and Final Rejection actions, adjusting the values as needed.

Name: Milan Tiwari Roll No. 0905CS211097
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Email: milantiwari2003@gmail.com

Create a Record Triggered Flow

Configure the Start Element

1. **Access Flows:**
   - Go to **Setup** and enter **Flows** in the Quick Find box.
   - Click **New Flow**.
2. **Select Flow Type:**
   - Choose **Record-Triggered Flow**.
   - Click **Create**.
3. **Configure Start:**
   - In the **Configure Start** window:
     - **Object:** Select **Appointment**.
     - **Trigger the Flow When:** Select **A record is created**

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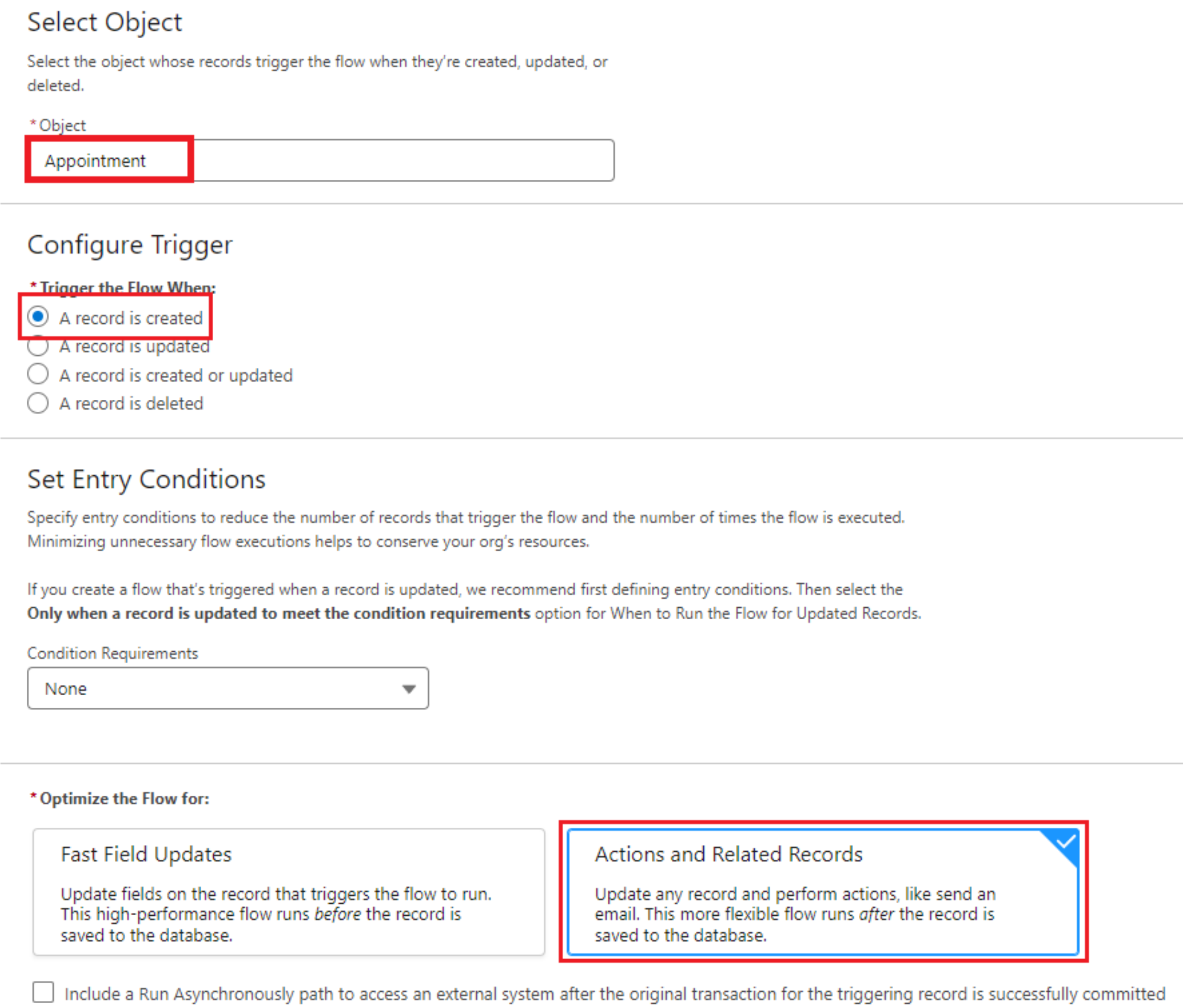

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4. **Finish Configuration:**
   - Click **Done** to finalize the Start Element.

Add Action Element

1. **Add Action Element:**
   - Drag an **Action** element onto the flow canvas after the **Start Element**.
   - Select the **Submit for Approval** action.
   - Label it as **Approval SubFlow**.
2. **Set Record ID:**
   - Set **RecordId** to `{!$Record.Id}`.

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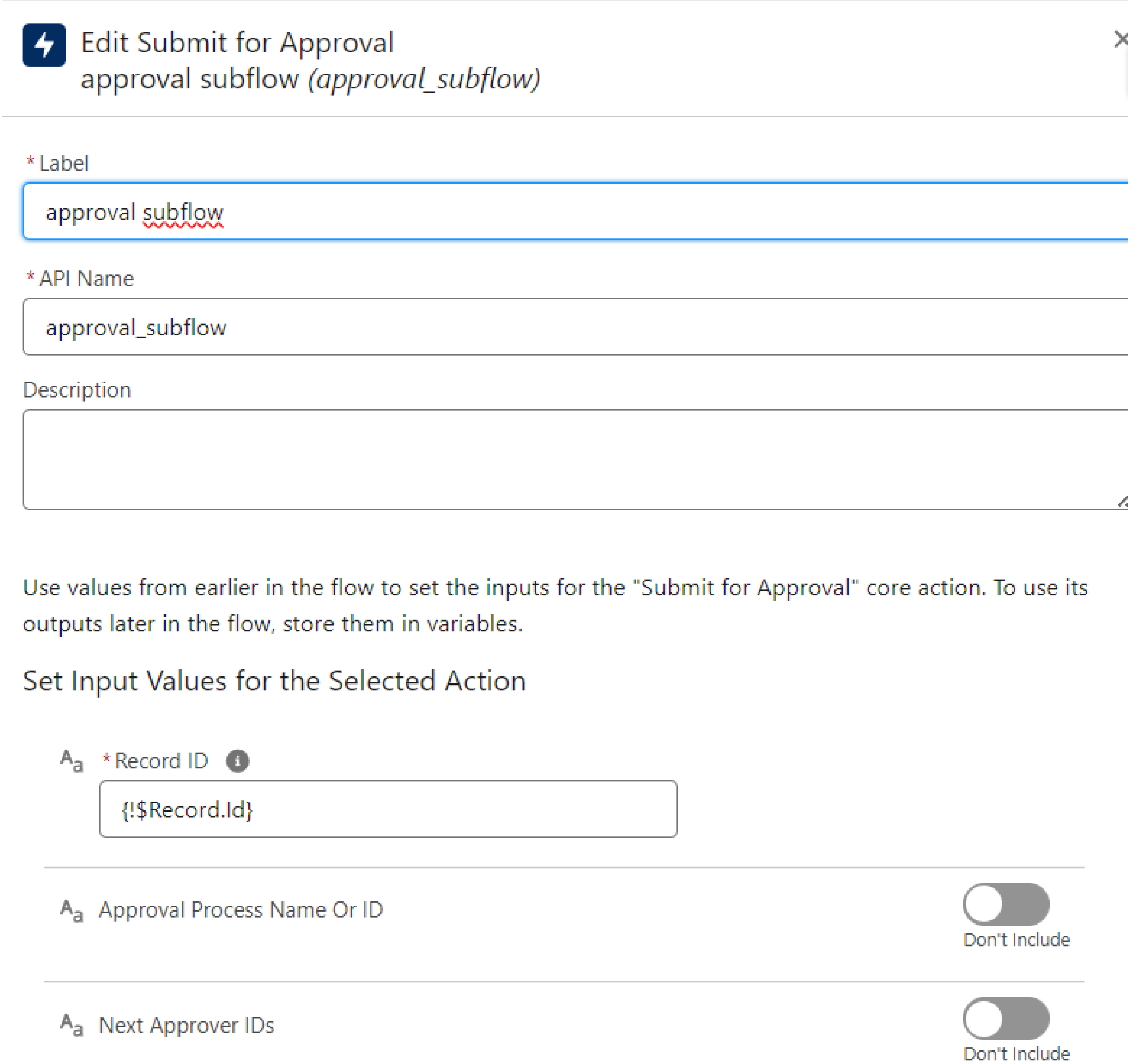

3. **Save the Flow:**

Create a ScreenFlow for Existing Student to Book an Appointment

Add Screen Element

1. **Access Flow Builder:**
    - Go to **Setup** and enter **Flow Builder** in the Quick Find box.

Name: Milan Tiwari Roll No. 0905CS211097
College: Institute of technology and management, Gwalior
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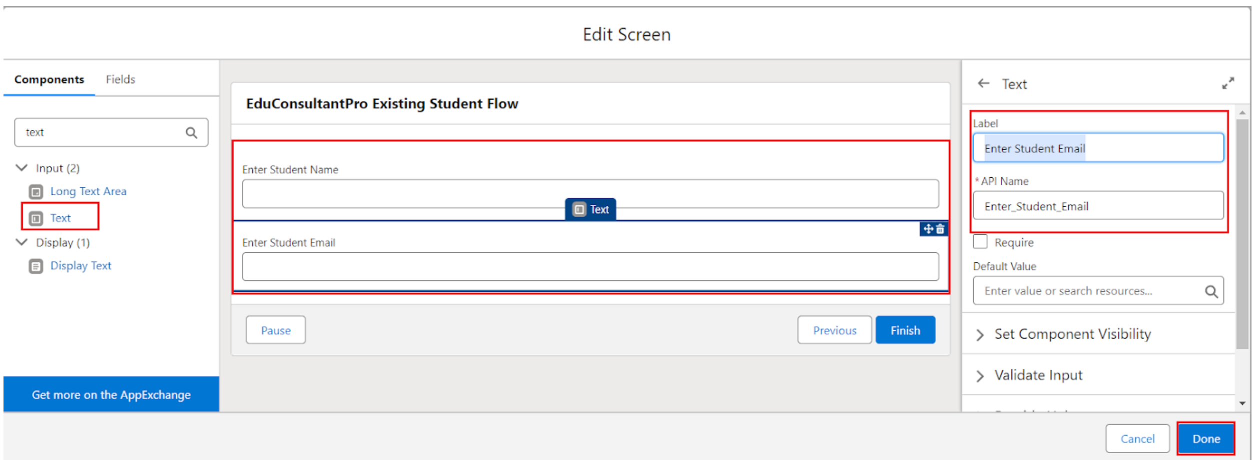
- Select **New Flow** and choose **Screen Flow**.

2. **Add Screen Element:**
    - Drag a **Screen** element onto the canvas.
    - In the **Screen Properties** pane, set the **Label** to **"Get Student Info"**.
3. **Add Text Components:**
    - From the left side panel, drag two **Text** components onto the screen:
        - **1st Text Component:**
            - Label: **Enter Student Name**
        - **2nd Text Component:**
            - Label: **Enter Student Email**



4. **Finish Configuration:**
    - Click **Done**.

Add GET Record Element

1. **Add GET Record Element:**
    - Drag a **GET Record** element onto the canvas after the **Decision Element** under the IELTS path.
    - Label it as **"Get Rec"**.
2. **Configure GET Record:**
    - **Select Object:** Choose **Student**.
    - **Condition Requirement:** Select **All Conditions are Met (AND)**.

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College: Institute of technology and management, Gwalior
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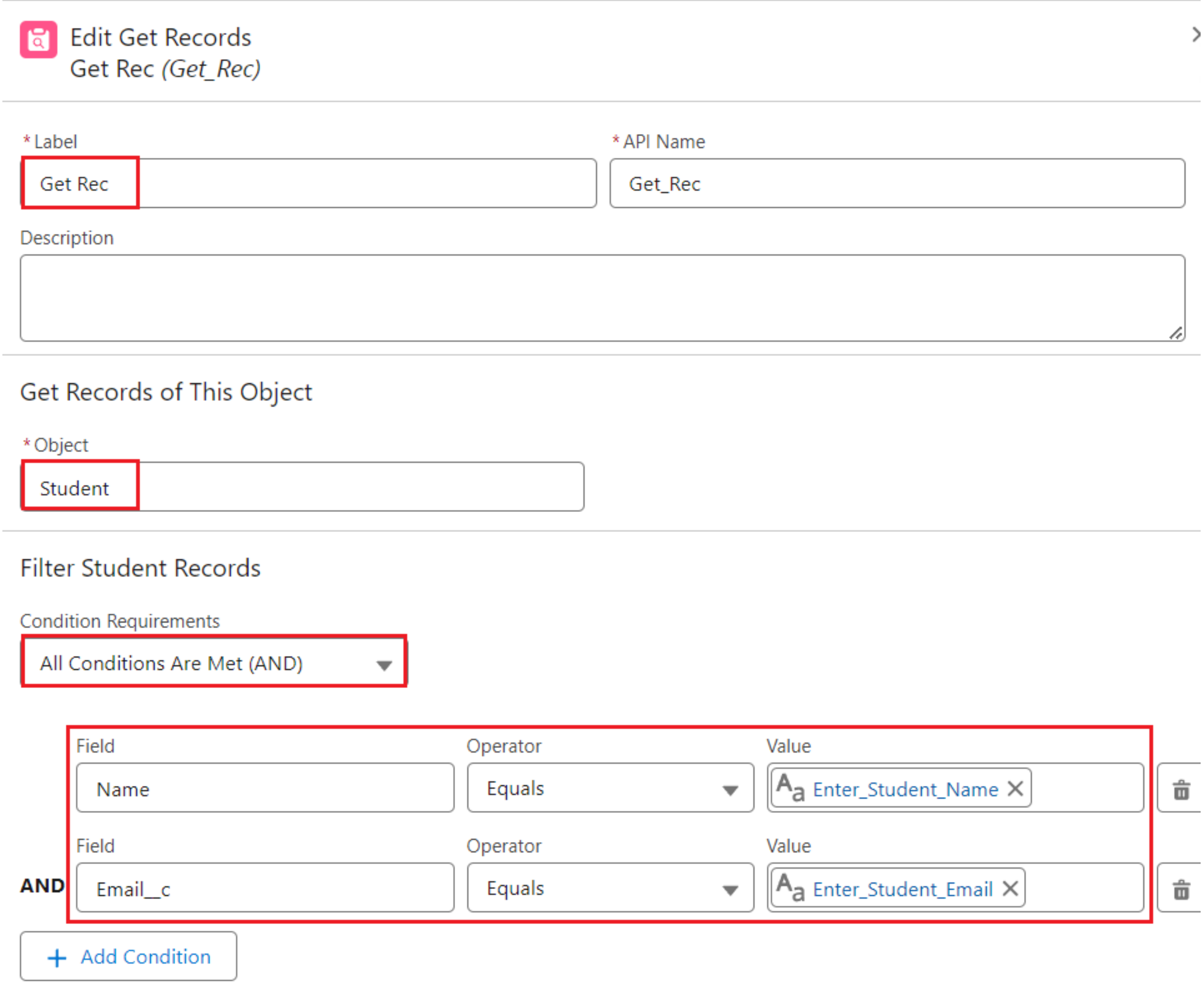


3. **Set Conditions:**
   - **Field:** Student Name
     - **Operator:** Equals
     - **Value:** `{!Enter_Student_Name}`
   - **Field:** Email__c
     - **Operator:** Equals
     - **Value:** `{!Enter_Student_Email}`
4. **Finish Configuration:**
   - Click **Done**.

Add Decision Element

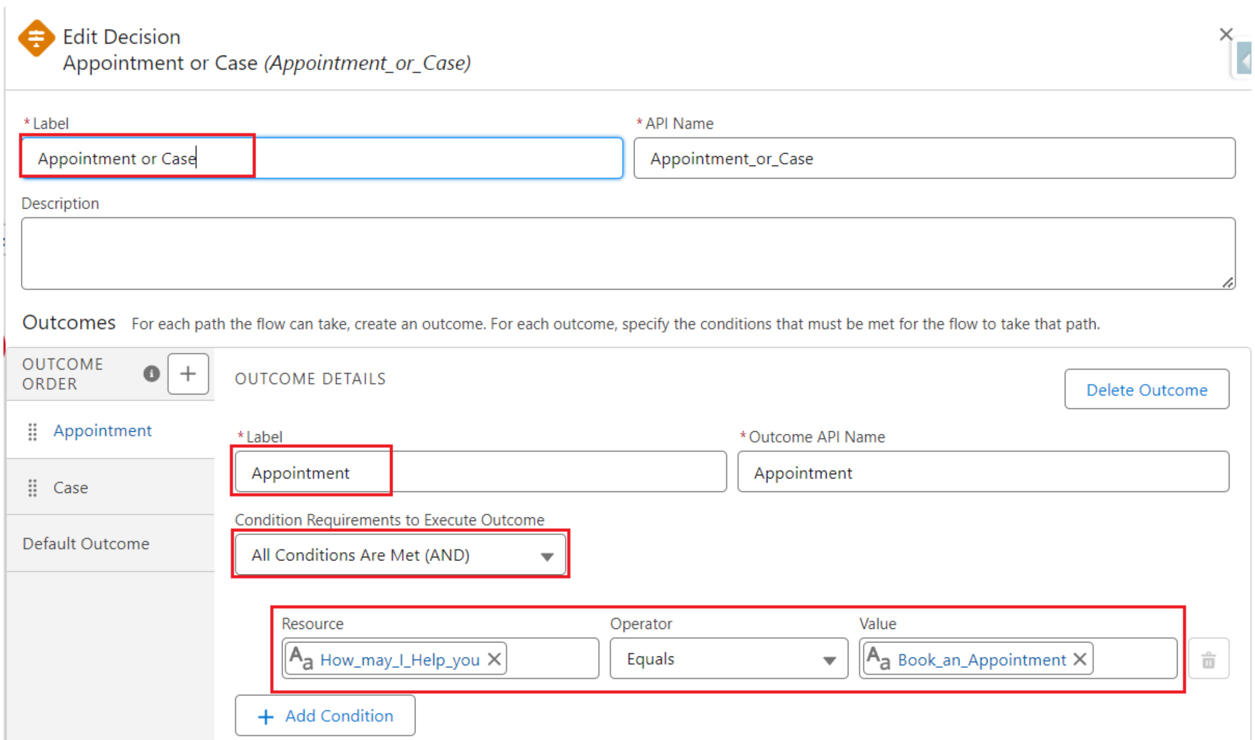
1. **Add Decision Element:**
   - Drag a **Decision** element onto the canvas after the **Select Display Student Details**

Name: Milan Tiwari Roll No. 0905CS211097
College: Institute of technology and management, Gwalior
Email: milantiwari2003@gmail.com

element.

- Label it as **"Appointment or Case"**.

2. **Configure Outcome for Appointment:**
   - Under **Outcome**, label it as **"Appointment"**.
   - Set the condition:
     - **Resource:** `{!How_may_I_Help_you}`
     - **Operator:** Equals
     - **Value:** `{!Book_an_Appointment}`
3. **Add Case Outcomes:**
   - Click the **"+"** icon to add another outcome.
   - Label it as **"Case"** and set the conditions based on your specific case options.



4. **Finish Configuration:**
   - Click **Done**.

Add Screen Element

1. **Add Screen Element:**
   - Drag a **Screen** element onto the canvas after the **Decision Element** on the Appointment path.
   - Label it as **"Appointment Booking Screen"**.

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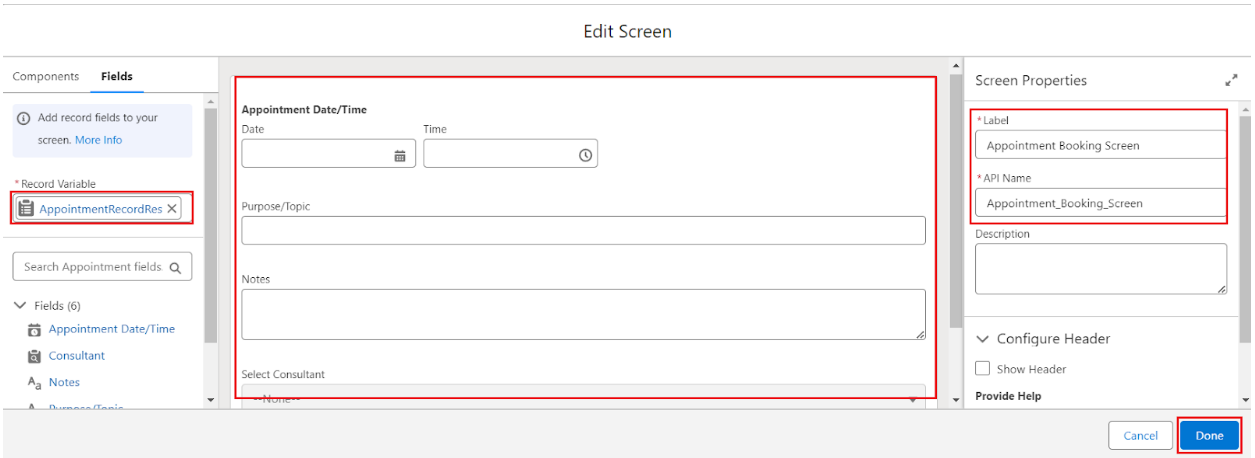
2. **Configure Fields:**
   - Click on **Fields**.
   - Create a new Resource:
     - **Resource Type:** Record Variable
     - **API Name:**`AppointmentRecordRes` (to display all fields from the Appointment object).



3. **Add Fields to Screen:**
   - Drag all necessary fields from the **AppointmentRecordRes** onto the screen to collect student information.
4. **Finish Configuration:**
   - Click **Done**.

Add GET Record Element

1. **Add GET Record Element:**
   - Drag a **GET Record** element onto the canvas after the **Decision Element** under the Appointment path.
   - Label it as **"Get Consultant Rec"**.
2. **Configure GET Record:**
   - **Select Object:** Choose **Consultant**.
   - **Condition Requirement:** Select **All Conditions are Met (AND)**.
3. **Set Condition:**
   - **Field:** Name
     - **Operator:** Equals
     - **Value:**`{!AppointmentRecordRes.Consultant_Name__c}`

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College: Institute of technology and management, Gwalior
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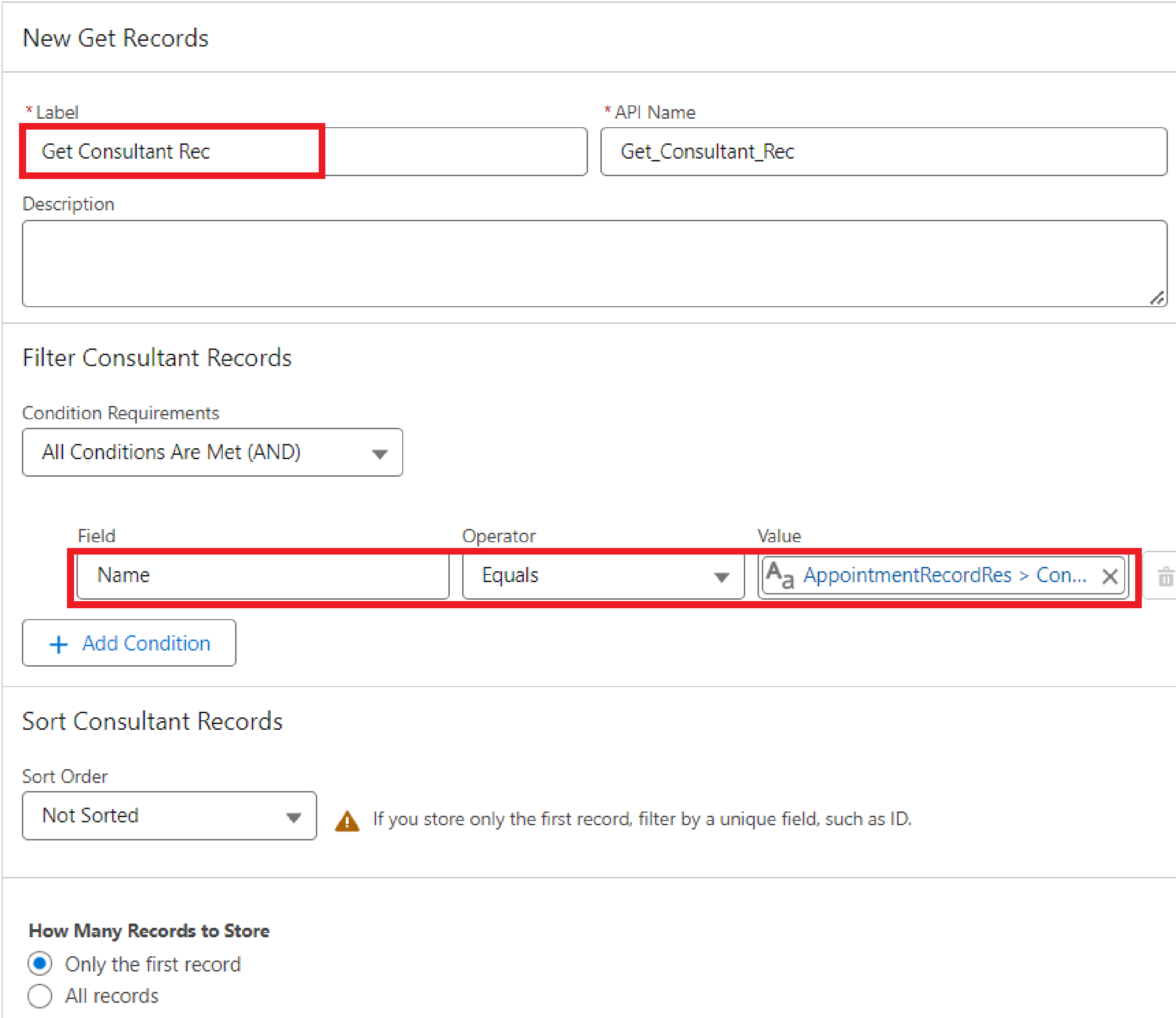


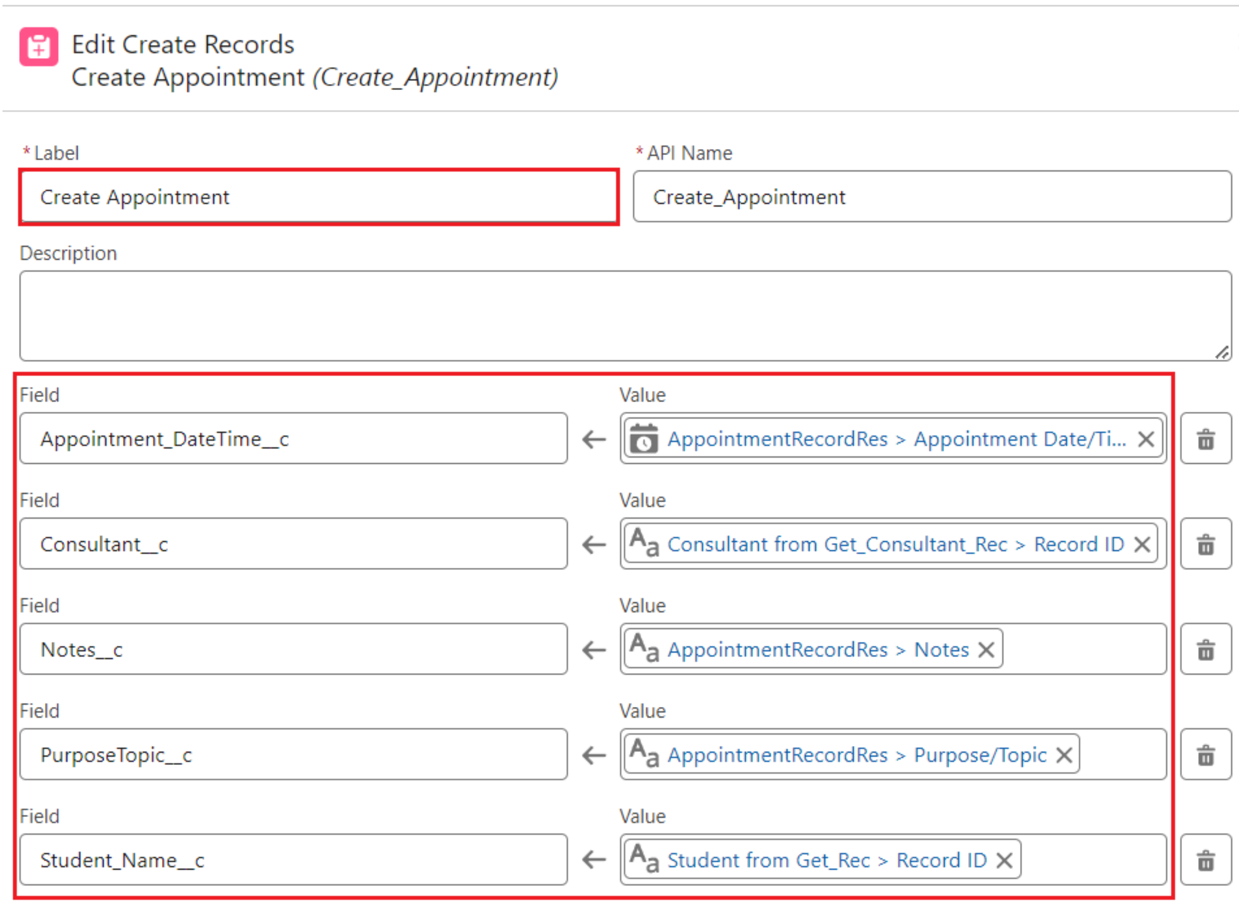
4. **Finish Configuration:**
   - Click **Done**.

Create Appointment Record

1. **Add Create Records Element:**
   - Drag a **Create Records** element onto the canvas after the **Get Consultant Rec** element.
   - Label it as **"Create Appointment"**.
2. **Configure Record Creation:**
   - **How many records to Create:** Select **"One"**.
   - **How to Set the record fields:** Select **"Use separate resources, and literal values"**.
3. **Select Object:**

- **Object:** Choose **Appointment**.

4. **Set Fields:**
    - **Field:** Appointment_DateTime__c
        - **Value:** `{!AppointmentRecordRes.Appointment_DateTime__c}`
    - **Field:** Consultant__c
        - **Value:** `{!Get_Consultant_Rec.Id}`
    - **Field:** Notes__c
        - **Value:** `{!AppointmentRecordRes.Notes__c}`
    - **Field:** PurposeTopic__c
        - **Value:** `{!AppointmentRecordRes.PurposeTopic__c}`
    - **Field:** Student_Name__c
        - **Value:** `{!Get_Rec.Id}`



5. **Finish Configuration:**
    - Click **Done**.

Add Confirmation Screen Element

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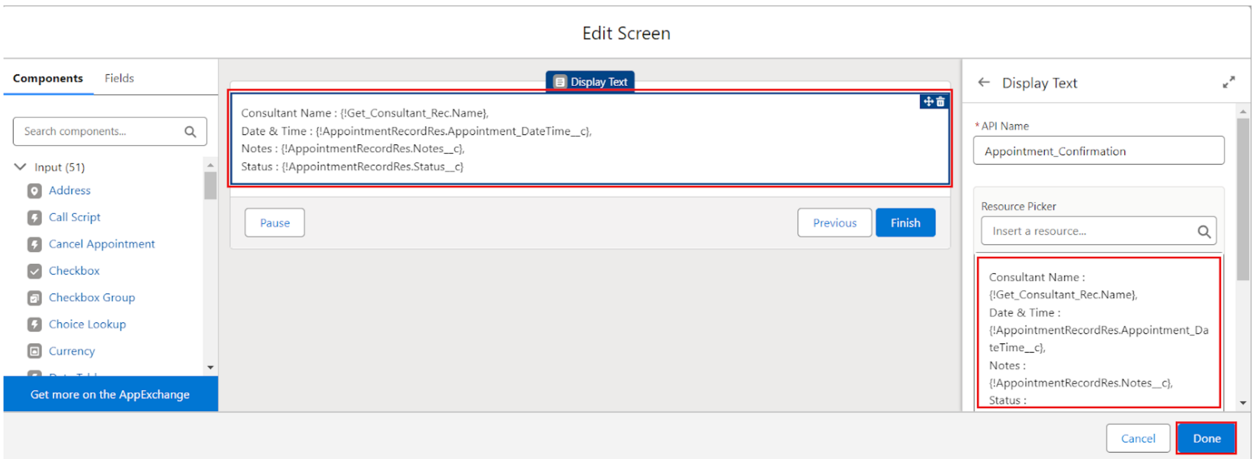
1. **Add Screen Element:**
   - Drag a **Screen** element onto the canvas after the **Send Email to Student** Action Element.
   - Label it as **"Confirmation Screen"**.
2. **Add Display Text Component:**
   - From the left side panel, search for the **Display Text** component and drag it to the main panel.
   - Label it as **"Appointment_Confirmation"**.



3. **Configure Display Text:**
   - In the **Resource picker box**, paste the following text:
   - ```
     Consultant Name : {!Get_Consultant_Rec.Name},

     Date & Time :
     {!AppointmentRecordRes.Appointment_DateTime__c},

     Notes : {!AppointmentRecordRes.Notes__c},
     ```
4. **Finish Configuration:**
   - Click **Done**.

Add SubFlow Element

1. **Add SubFlow Element:**
   - Drag a **SubFlow** element onto the canvas after the **Decision Element** on the Case path.
   - Search for and select **"Create a Case"**.
   - Label it as **"Create Student Case"**.
2. **Configure SubFlow:**
     ```

Name: Milan Tiwari Roll No. 0905CS211097
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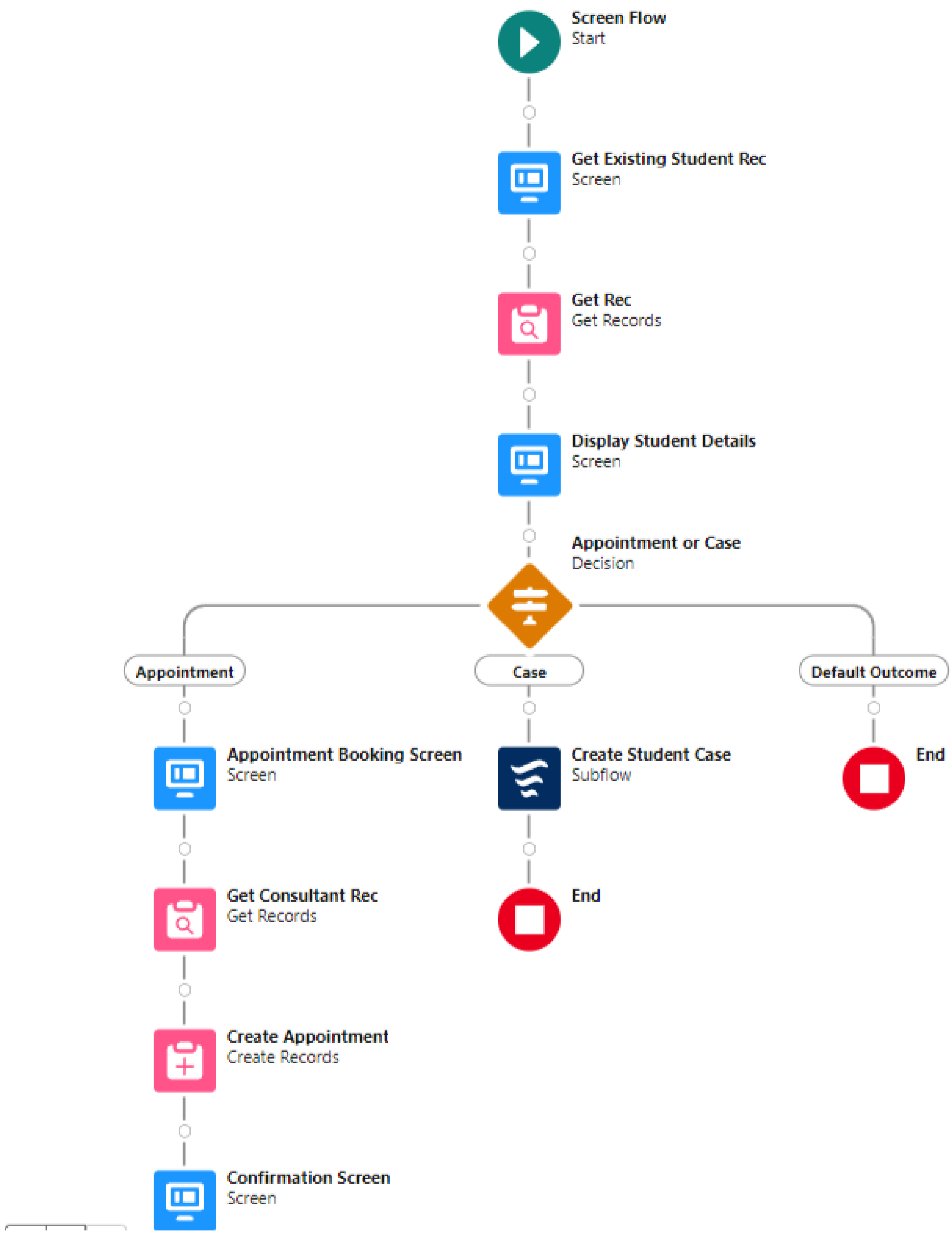
- Ensure any necessary input variables are set according to the requirements of the "Create a Case" flow.



3. **Save the Flow:**
   - Click **Save**.
   - Label it as **"EduConsultantPro Existing Student Flow"**.

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Create a ScreenFlow to Combine all the flows at one place

Add Welcome Screen Element

1. **Add Screen Element:**
   - Drag a **Screen** element onto the canvas.
   - Label it as **“Welcome Screen”**.
2. **Add Display Text Component:**
   - From the left side panel, search for the **Display Text** component and drag it to the main panel.
   - Label it as **“SuccessMessage”**.
3. **Configure Display Text:**
   - In the **Resource picker box**, paste the following text:
   - ```
     "Welcome to EduConsultantPro

     your premier destination for education and immigration solutions!

     At EduConsultantPro, we understand that embarking on educational or immigration journeys can be both exhilarating and daunting. That's why we're here to guide you every step of the way with expertise, dedication, and personalized support.

     Whether you're seeking to pursue your academic dreams abroad, navigate the complexities of immigration processes, or enhance your professional skills through international opportunities, EduConsultantPro is your trusted partner.

     Our team of seasoned consultants is committed to understanding your unique aspirations and crafting tailored strategies to help you achieve your goals efficiently and effectively. From selecting the right educational institution to navigating visa procedures, our comprehensive services
     ```
     ```

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cover all aspects of your journey.

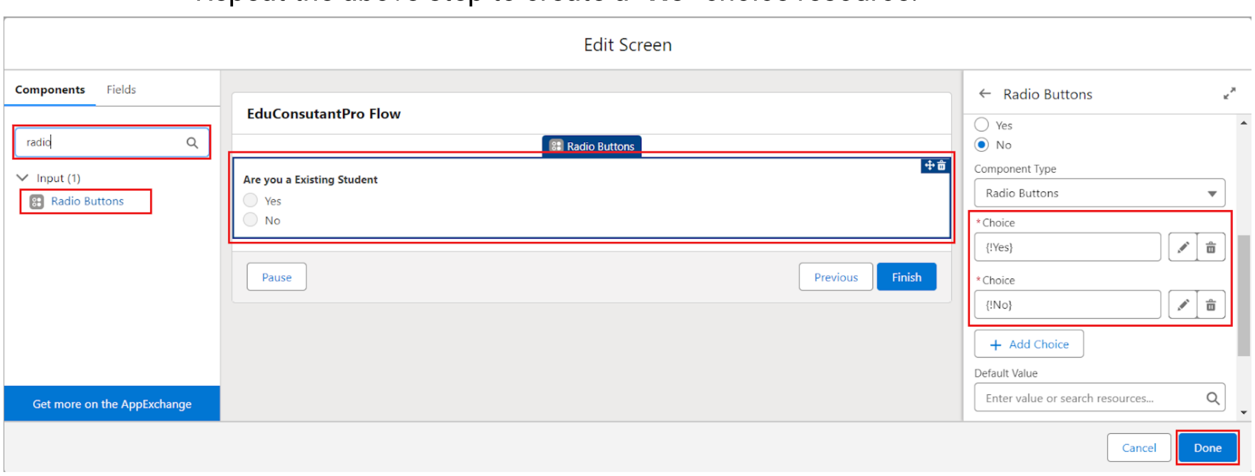
At EduConsultantPro, we believe in fostering inclusive communities and unlocking the full potential of every individual. With our unwavering commitment to excellence and integrity, we strive to make your experience with us seamless and rewarding.

Welcome to EduConsultantPro – where your aspirations meet our expertise, and together, we pave the path to success. Let's embark on this transformative journey together!"

4. **Finish Configuration:**
   - Click **Done**.

Add Existing or New Student Confirmation Screen Element

1. **Add Screen Element:**
   - Drag a **Screen** element onto the canvas after the **Welcome Screen** element.
   - Label it as **"Existing or New Student Confirmation Screen"**.
2. **Add Radio Button Component:**
   - From the left side panel, search for and drag a **Radio Button** component to the main panel.
   - Label it as **"Are you an Existing Student?"**.
3. **Add Choices:**
   - Click on **Add Choice**.
     - Type **"Yes"** in the input field and click **Create Yes choice**.
   - Repeat the above step to create a **"No"** choice resource.



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4. **Finish Configuration:**
   - Click **Done**.

Add Decision Element

1. **Add Decision Element:**
   - Drag a **Decision** element onto the canvas after the **Existing or New Student Confirmation Screen** element.
   - Label it as **"Decision 1"**.
2. **Configure Outcome for Existing Student:**
   - Under the outcome, label it as **"If Existing Student"**.
   - Set the condition as follows:
     - **Resource:** `{!Are_you_a_Existing_Student}`
     - **Operator:** Equals
     - **Value:** `{!Yes}`
3. **Add Outcome for New Student:**
   - Click on the **"+"** icon.
   - Repeat step 2 for the **No** option:
     - Label it as **"If New Student"**.
     - Set the same resource with the value `{!No}`.
4. **Finish Configuration:**
   - Click **Done**.

Add SubFlow Element

1. **Add SubFlow Element:**
   - Drag a **SubFlow** element onto the canvas after the **Decision 1** element on the **If Existing Student** path.
   - Search for and select **"EduConsultantPro Existing Student Flow"**.
   - Label it as **"Existing Student Flow"**.
2. **Finish Configuration:**
   - Click **Done**.

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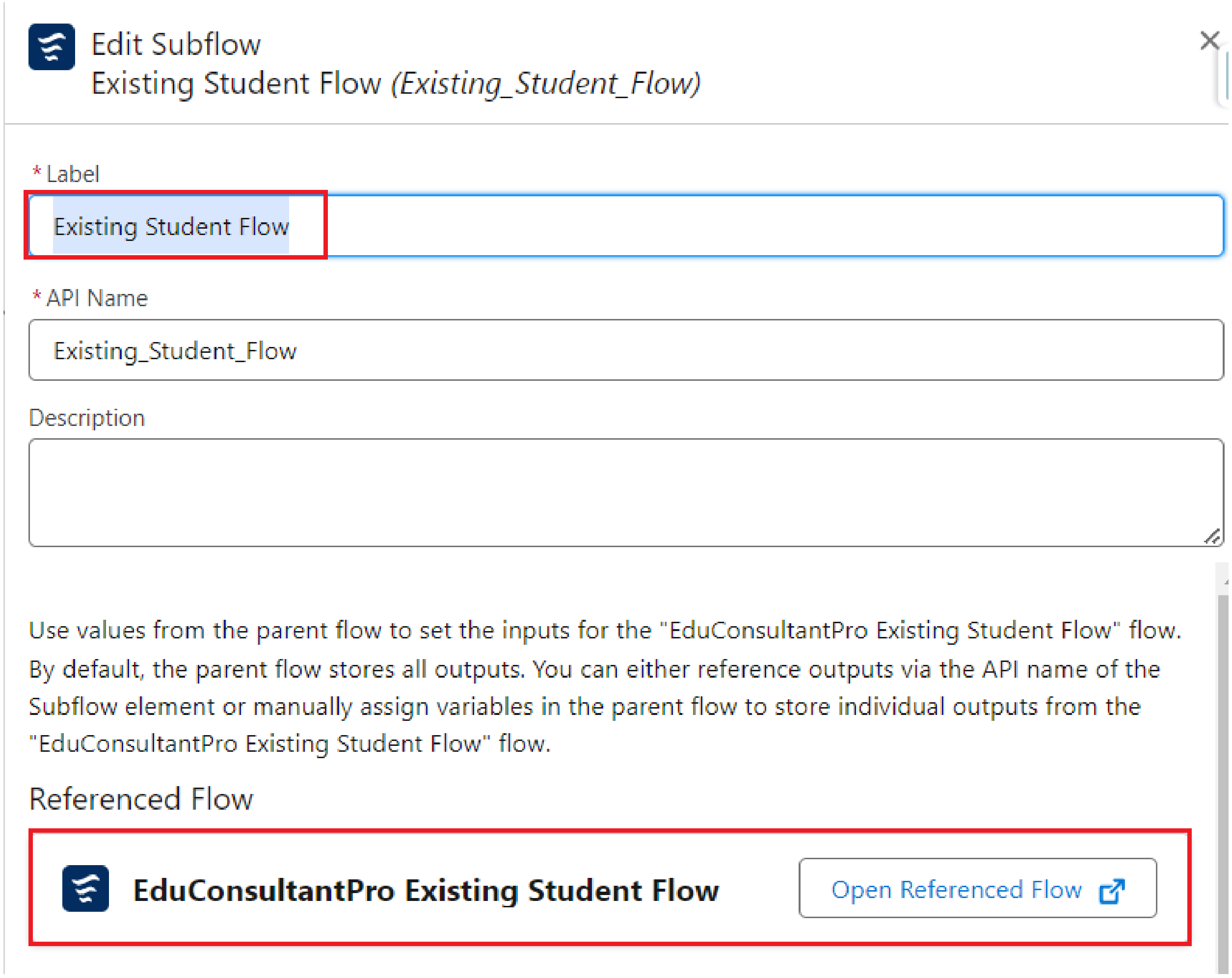

3. **Save the Flow:**
   - Label it as **"EduConsultantPro Existing Student Flow"**.

Add SubFlow Element for New Student

1. **Add SubFlow Element:**
   - Drag a **SubFlow** element onto the canvas after the **Decision 1** element on the **If Not an Existing Student** path.
   - Search for and select **"EduConsultantPro Student Flow"**.
   - Label it as **"New Student Flow"**.

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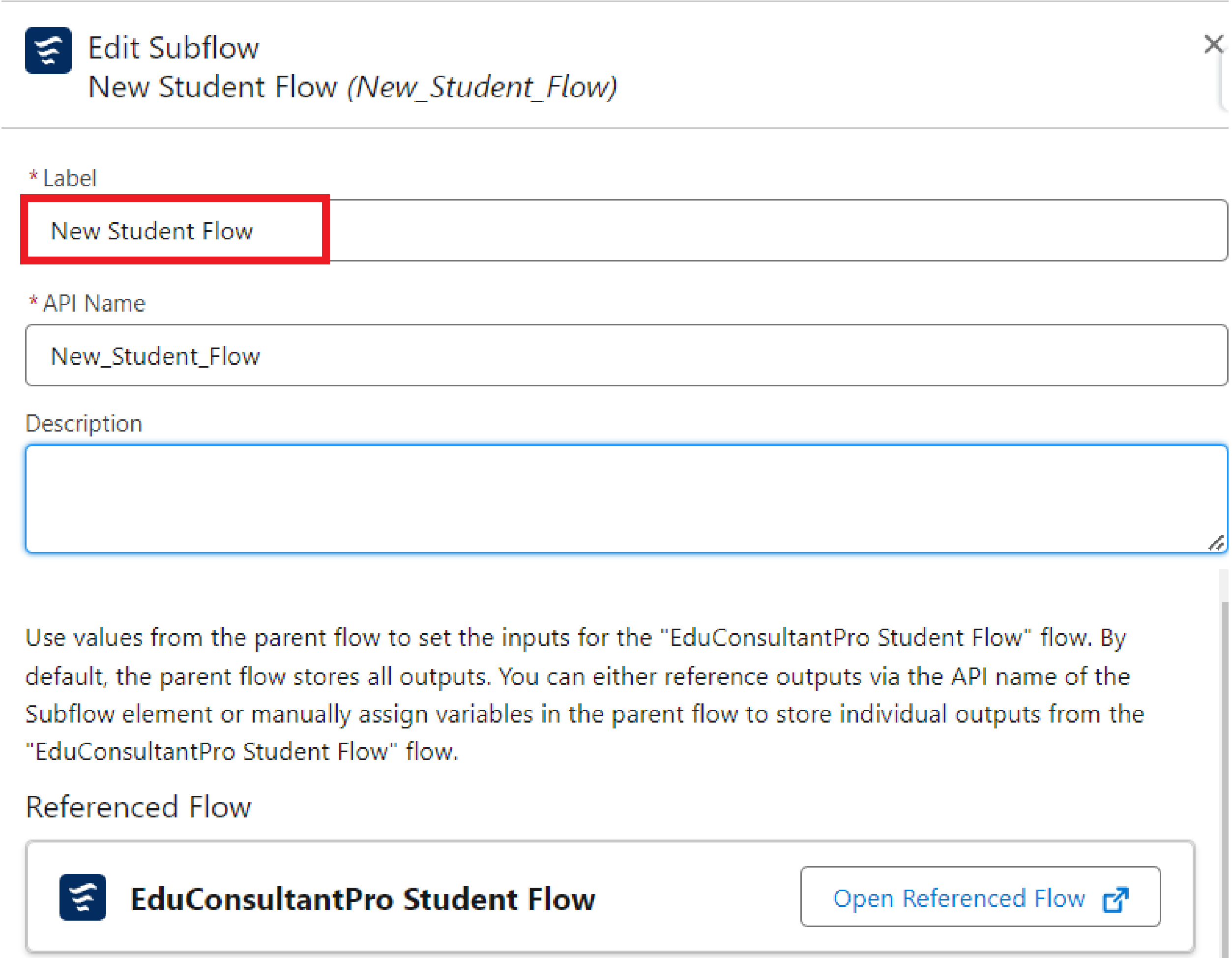

2. **Finish Configuration:**
   - Click **Done**.
3. **Save the Flow:**
   - Label it as **“EduConsultantPro Existing Student Flow”** (as specified).

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College: Institute of technology and management, Gwalior
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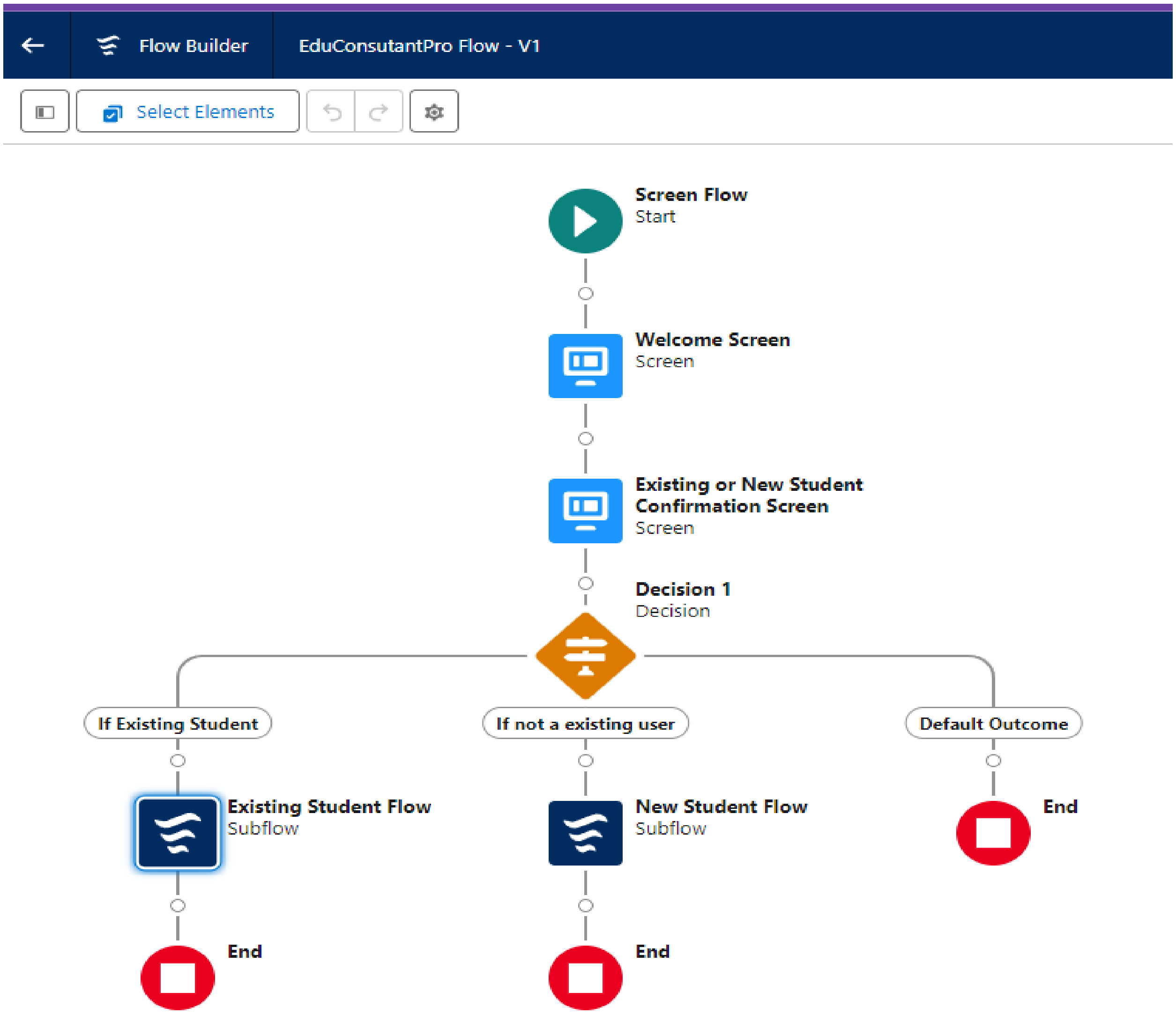

4. **Final Save:**
   - Save the flow again and label it as **"EduConsultPro Flow"**.

Create a lightning app page

Create a lightning app page and make it available at the application

Create a Lightning App Page

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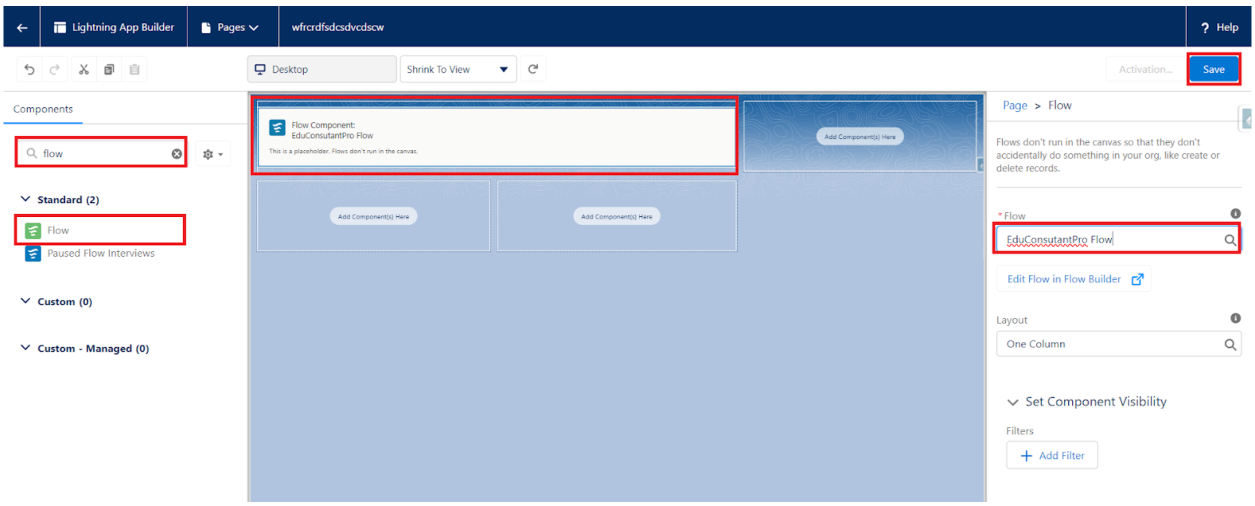
1. **Access Lightning App Builder:**
   - From Setup, enter **App Builder** in the Quick Find box and click on **Lightning App Builder**.
2. **Create New Page:**
   - Click **New** and select **Home Page**. Click **Next**.
   - Name the page **"EduConsultPro Home Page"**, select the **Standard Home Page** template, and click **Done**.
3. **Add Flow Component:**
   - Drag the **Flow** component to the top-right region of the page.
   - Search for **"EduConsultantPro Flow"** and select it.



4. **Save the Page:**
   - Click **Save**.
5. **Activate the Page:**
   - Click **Activate**.
   - Under **App and Profile**, click **Assign to Apps and Profiles**.
   - Select the **Sales app** and click **Next**.
   - Scroll down to select **System Administrator** profile and click **Next**.
   - Review the assignment and click **Save**.

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