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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.

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:

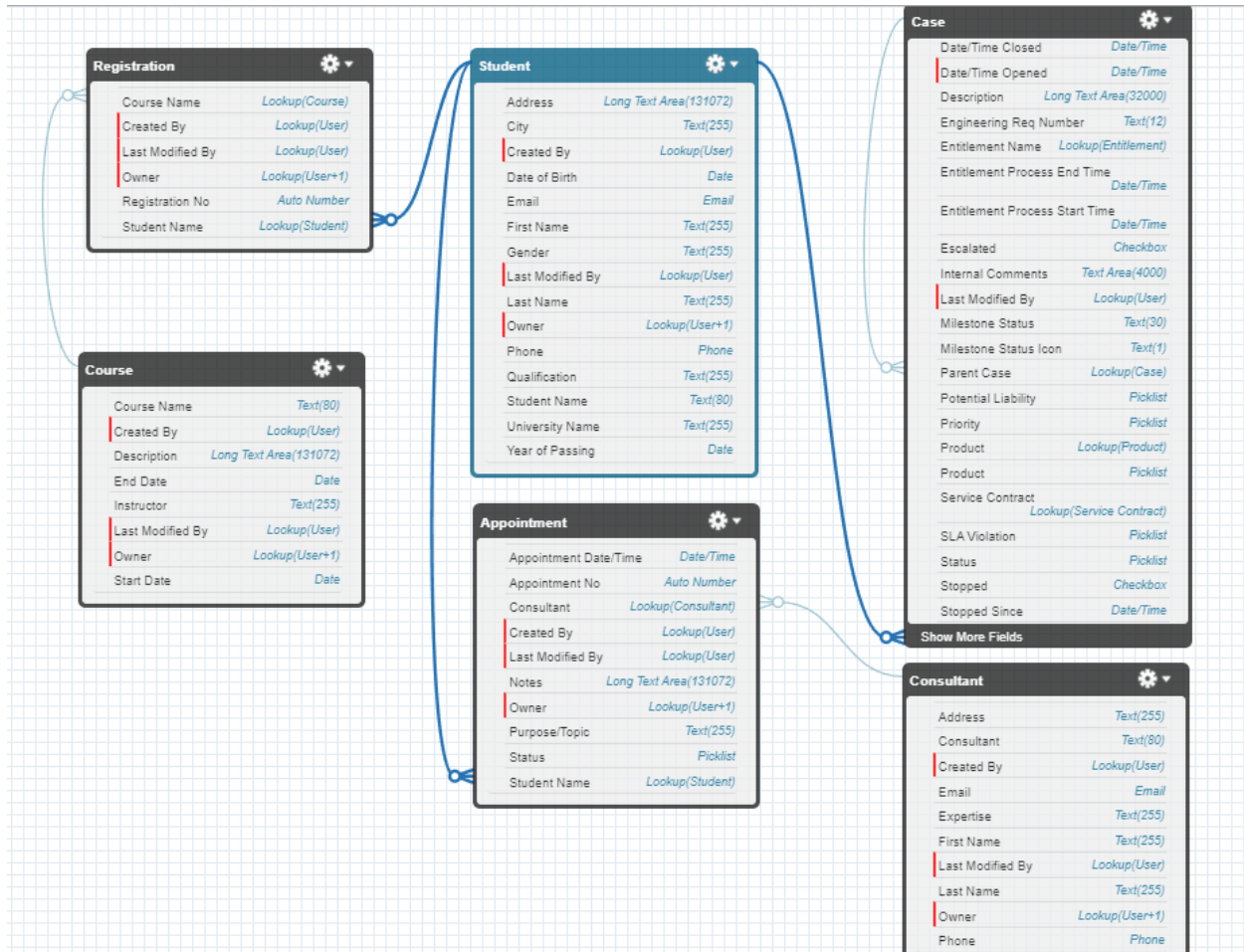
- **Appointment** → **Student**
- **Appointment** → **Consultant**
- **Registration** for student-course details
- **Case** → **Student**

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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:

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- 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.

The screenshot displays the 'Edit Screen' interface. The central canvas is titled 'EduConsultantPro Student Flow' and contains a 'Header' tab. The left sidebar shows the 'Components' pane with the 'Fields' section active, displaying a search bar and a list of fields including 'Address', 'City', 'Date of Birth', and 'Email'. A 'Record Variable' section shows 'StudentRecordRes' selected. The right sidebar shows the 'Screen Properties' pane with fields for 'Label' (set to 'Student Info'), 'API Name' (set to 'Student_Info'), and 'Description'. At the bottom right, there are 'Cancel' and 'Done' buttons.

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.

New Create Records

* Label	* API Name
Create Student Record	Create Student Record

Description

How Many Records to Create

☒ One

☐ Multiple


How to Set the Record Fields

☒ Use all values from a record

☐ Use separate resources, and literal values

Create a Record from These Values

* Record

 StudentRecordRes X

Make sure that ID is blank. After the flow creates the records, ID is set to match the record that was created. ⓘ

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:

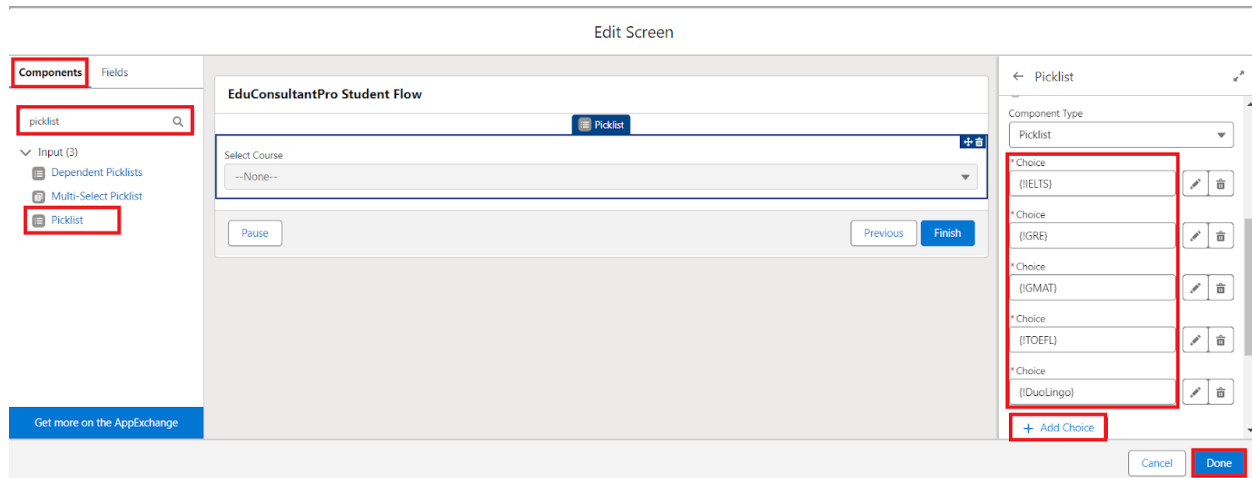
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- **IELTS** (This creates a variable named IELTS)
- **GRE**
- **GMAT**
- **Duolingo**
- **TOEFL**



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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- **Label:** Selected Duolingo
 - Value: Duolingo
- **Label:** Selected TOEFL
 - Value: TOEFL

 Edit Decision
Selecting Course (Selecting_Course)

*Label
Selecting Course

*API Name
Selecting_Course

Description

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER

+

OUTCOME DETAILS

Delete Outcome

Selected IELTS

Selected GRE

Selected GMAT

Selected Duolingo

Selected TOEFL

Default Outcome

*Label
Selected IELTS

*Outcome API Name
Selected_IELTS

Condition Requirements to Execute Outcome
All Conditions Are Met (AND)

Resource
Select_Course

Operator
Equals

Value
IELTS

+ Add Condition

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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- **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.

The screenshot shows a configuration window titled 'Edit Get Records' with the subtitle 'Get IELTS Rec (Get_IELTS_Rec)'. It contains several sections:

- * Label:** A text field containing 'Get IELTS Rec'.
- * API Name:** A text field containing 'Get_IELTS_Rec'.
- Description:** An empty text area.
- Get Records of This Object:** A section with *** Object:** set to 'Course'.
- Filter Course Records:** A section with **Condition Requirements:** set to 'All Conditions Are Met (AND)'.
- Field, Operator, Value:** A table with one row: Field is 'Name', Operator is 'Equals', and Value is 'Select_Course'.
- + Add Condition:** A button at the bottom left.

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

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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.

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Edit Create Records

Create IELTS Registration Rec (*Create_IELTS_Registration_Rec*)

* Label

Create IELTS Registration Rec

* API Name

Create_IELTS_Registration_Rec

Description

How Many Records to Create

☒ One

☐ Multiple

How to Set the Record Fields

☐ Use all values from a record

☒ Use separate resources, and literal values

Create a Record of This Object

* Object

Registration

Set Field Values for the Registration

Field

Course_Name__c

Value

←



Field

Student_Name__c

Value

←



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**.

Edit Text Template

* API Name

StuRegistrationEmailTextTempBody

Description

* Body ⓘ

Resource Picker

Insert a resource...

View as Plain Text ▼

Dear !StudentRecordRes.Name,

Congratulations and welcome to EduConsultantPro!

We are delighted to inform you that your registration on our platform has been successfully completed. You are now part of our esteemed community dedicated to empowering students like you to achieve their educational and immigration aspirations.

At EduConsultantPro, we understand the importance of your academic and career goals, and we are committed to providing you with the highest level of support and guidance throughout your journey.

Here are a few key points to help you get started:

Cancel

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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Edit Send Email

Send Email to Student (*Send_Email_to_Student*)



* Label

Send Email to Student

* API Name

Send_Email_to_Student

Description

Set Input Values for the Selected Action

A_a Body ⓘ	<input type="text" value="{!StuRegistrationEmailTextTempBody}"/>	<input checked="" type="checkbox"/> Include
A_a Recipient Address List ⓘ	<input type="text" value="{!StudentRecordRes.Email__c}"/>	<input checked="" type="checkbox"/> Include
A_a Subject ⓘ	<input type="text" value="{!StuRegistrationEmailTextTempSub}"/>	<input checked="" type="checkbox"/> Include

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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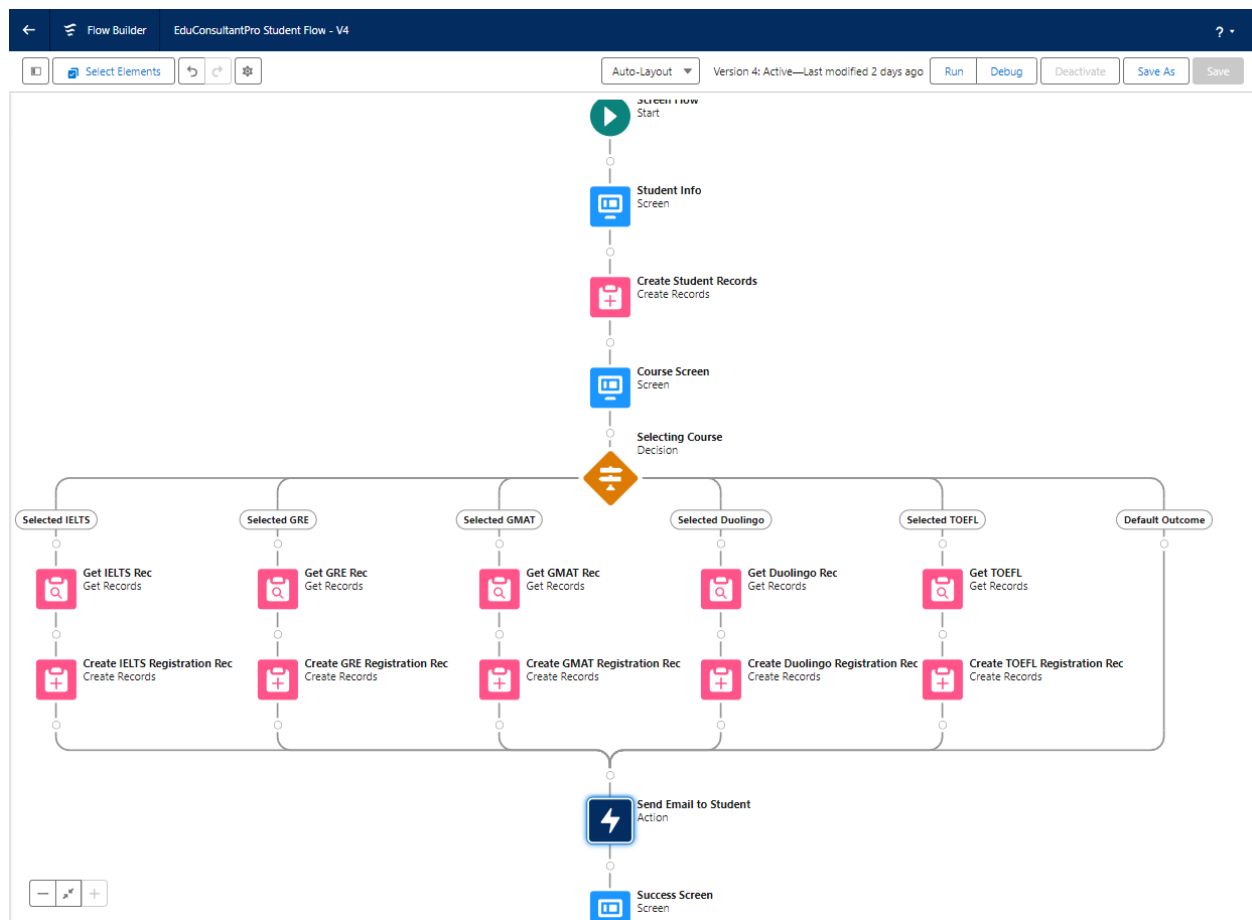
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We are delighted to inform you that your registration on our platform has been successfully completed. You are now part of our esteemed community dedicated to empowering students like you to achieve their educational and immigration aspirations. Your 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.

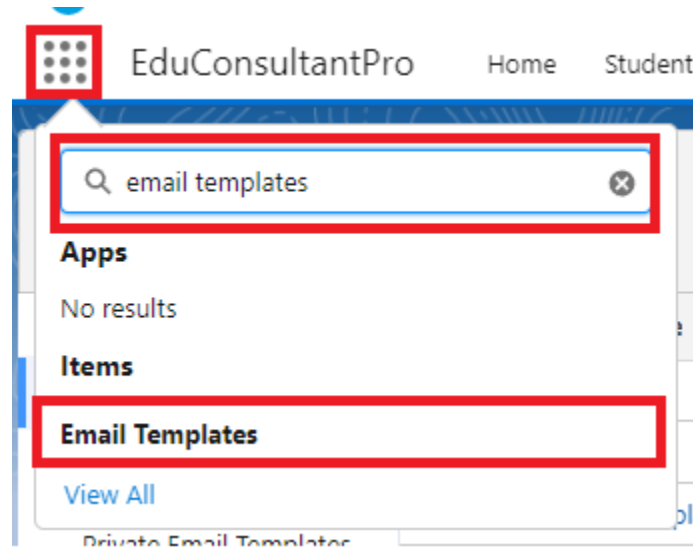
The screenshot shows the 'Approver Settings' section of a Salesforce user's profile. It includes fields for 'Delegated Approver', 'Manager' (set to 'Consultant'), and 'Receive Approval Request Emails' (set to 'Only if I am an approver'). The 'Manager' dropdown and the 'Save' button are highlighted with red boxes.

- 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.



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}}}

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New Email Template

Information

* Email Template Name

Student Request Template

Related Entity Type

Appointment

Description

Folder

EduConsultantPro

Select Folder

Message Content

Subject

Appointment Request with EduConsultantPro Consulta

Enhanced Letterhead

Search Enhanced Letterheads...

HTML Value

Source Font Size B I U A

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 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}}},

Cancel

Save

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:

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- 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.

Select Approver

Using the options below, specify the user to whom the approval request should be assigned.

☐ Let the submitter choose the approver manually.

☒ Automatically assign an approver using a standard or custom hierarchy field: **Manager**

☐ Automatically assign to queue.

☐ Automatically assign to approver(s).

Because this is the Jump Start Wizard, Salesforce automatically chooses some settings for you. [Show More](#)

Save **Cancel**

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**.

Initial Submission Actions

Add Existing **Add New**

Action	Type	Description
	Record Lock	Lock the record

Task
Email Alert
Field Update

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.

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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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Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Appointment

Configure Trigger

* Trigger the Flow When:

- ☒ A record is created
- ☐ A record is updated
- ☐ A record is created or updated
- ☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

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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Edit Submit for Approval
approval subflow (*approval_subflow*)



* Label

approval_subflow

* API Name

approval_subflow

Description

Use values from earlier in the flow to set the inputs for the "Submit for Approval" core action. To use its outputs later in the flow, store them in variables.

Set Input Values for the Selected Action

A_a * Record ID ⓘ

{!\$Record.Id}

A_a Approval Process Name Or ID



Don't Include

A_a Next Approver IDs



Don't Include

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.

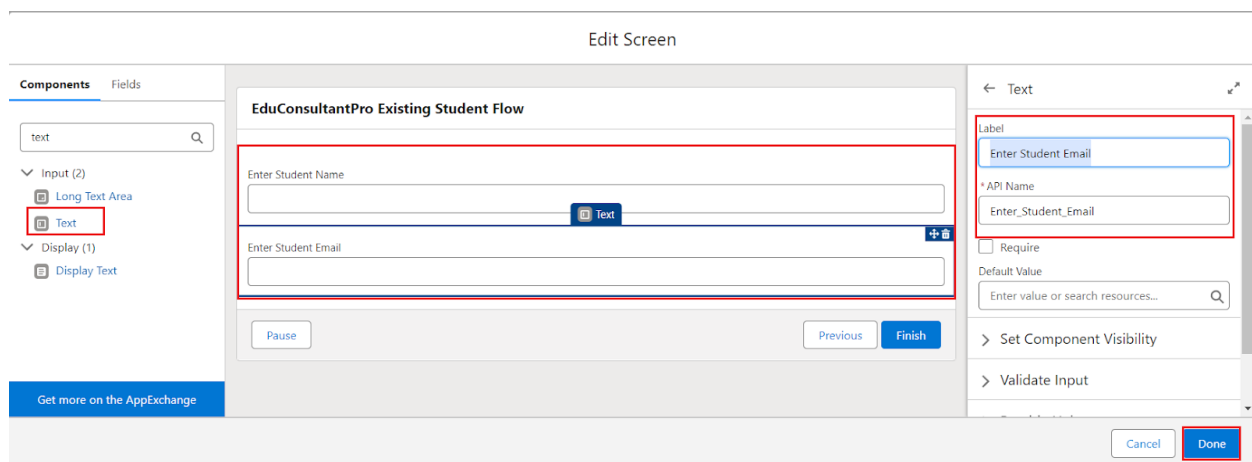
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- Select **New Flow** and choose **Screen Flow**.
- 2. **Add Screen Element:**
 - Drag a **Screen** element onto the canvas.
 - In the **Screen Properties** pane, set the **Label** to “**Get Student Info**”.
- 3. **Add Text Components:**
 - From the 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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Edit Get Records

Get Rec (*Get_Rec*)



* Label

Get Rec

* API Name

Get_Rec

Description

Get Records of This Object

* Object

Student

Filter Student Records

Condition Requirements

All Conditions Are Met (AND)

Field	Operator	Value	
Name	Equals	<input type="text" value="Enter_Student_Name"/>	
AND			
Email__c	Equals	<input type="text" value="Enter_Student_Email"/>	

[+ Add Condition](#)

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**

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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.

The screenshot shows the 'Edit Decision' interface for a decision named 'Appointment or Case (Appointment_or_Case)'. The interface includes a header with a close button and a description field. Below the description is the 'Outcomes' section, which contains a table with columns for 'OUTCOME ORDER', 'Label', 'Outcome API Name', and 'Condition Requirements to Execute Outcome'. The table has two rows: 'Appointment' and 'Case'. The 'Appointment' row is selected, and its details are shown in the 'OUTCOME DETAILS' section. The details include a 'Label' field with the value 'Appointment', an 'Outcome API Name' field with the value 'Appointment', and a 'Condition Requirements to Execute Outcome' dropdown menu with the value 'All Conditions Are Met (AND)'. Below the dropdown is a table for conditions with columns for 'Resource', 'Operator', and 'Value'. The 'Resource' column has the value 'How_may_I_Help_you', the 'Operator' column has the value 'Equals', and the 'Value' column has the value 'Book_an_Appointment'. There is a '+ Add Condition' button at the bottom of the conditions table.

Edit Decision
Appointment or Case (Appointment_or_Case)

* Label
Appointment or Case

* API Name
Appointment_or_Case

Description

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	Label	Outcome API Name	Condition Requirements to Execute Outcome
1	Appointment	Appointment	All Conditions Are Met (AND)
2	Case		

Appointment

Case

Default Outcome

Condition Requirements to Execute Outcome

All Conditions Are Met (AND)

Resource	Operator	Value
How_may_I_Help_you	Equals	Book_an_Appointment

+ Add Condition

4. Finish Configuration:

- Click **Done**.

Add Screen Element

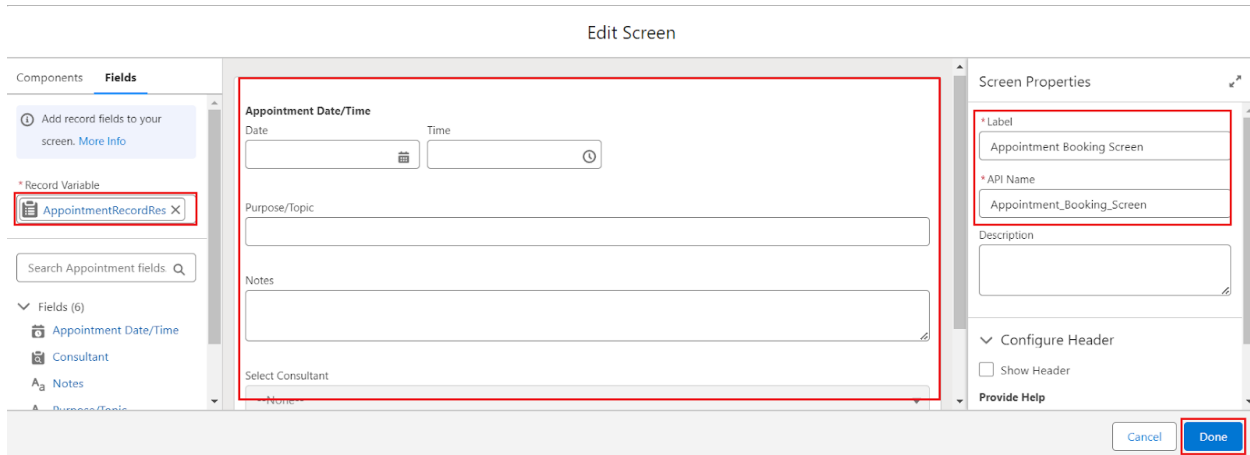
1. Add Screen Element:

- 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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New Get Records

* Label

Get Consultant Rec

* API Name

Get_Constant_Rec

Description

Filter Consultant Records

Condition Requirements

All Conditions Are Met (AND)

Field

Operator

Value

Name

Equals

AppointmentRecordRes > Con...

+ Add Condition

Sort Consultant Records

Sort Order

Not Sorted

⚠

If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

☒ Only the first record

☐ All records

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:

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- **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}

 Edit Create Records
Create Appointment (*Create_Appointment*)






* Label

Create Appointment

* API Name

Create_Appointment

Description

Field	Value
Appointment_DateTime__c	 AppointmentRecordRes > Appointment Date/Ti... X
Consultant__c	 Consultant from Get_Consultant_Rec > Record ID X
Notes__c	 AppointmentRecordRes > Notes X
PurposeTopic__c	 AppointmentRecordRes > Purpose/Topic X
Student_Name__c	 Student from Get_Rec > Record ID X

5. Finish Configuration:

- Click **Done**.

Add Confirmation Screen Element

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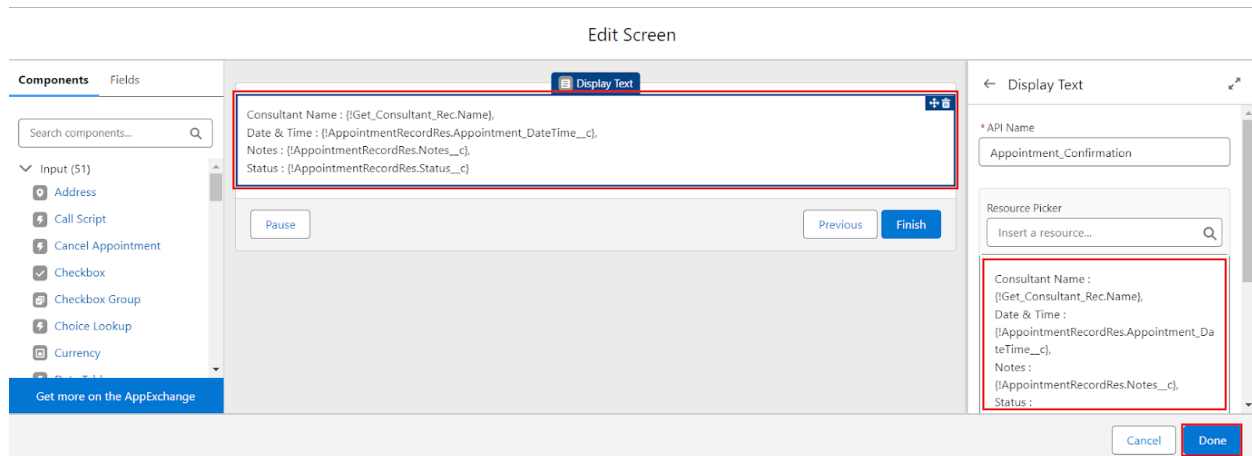
Email: milantiwari2003@gmail.com

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:

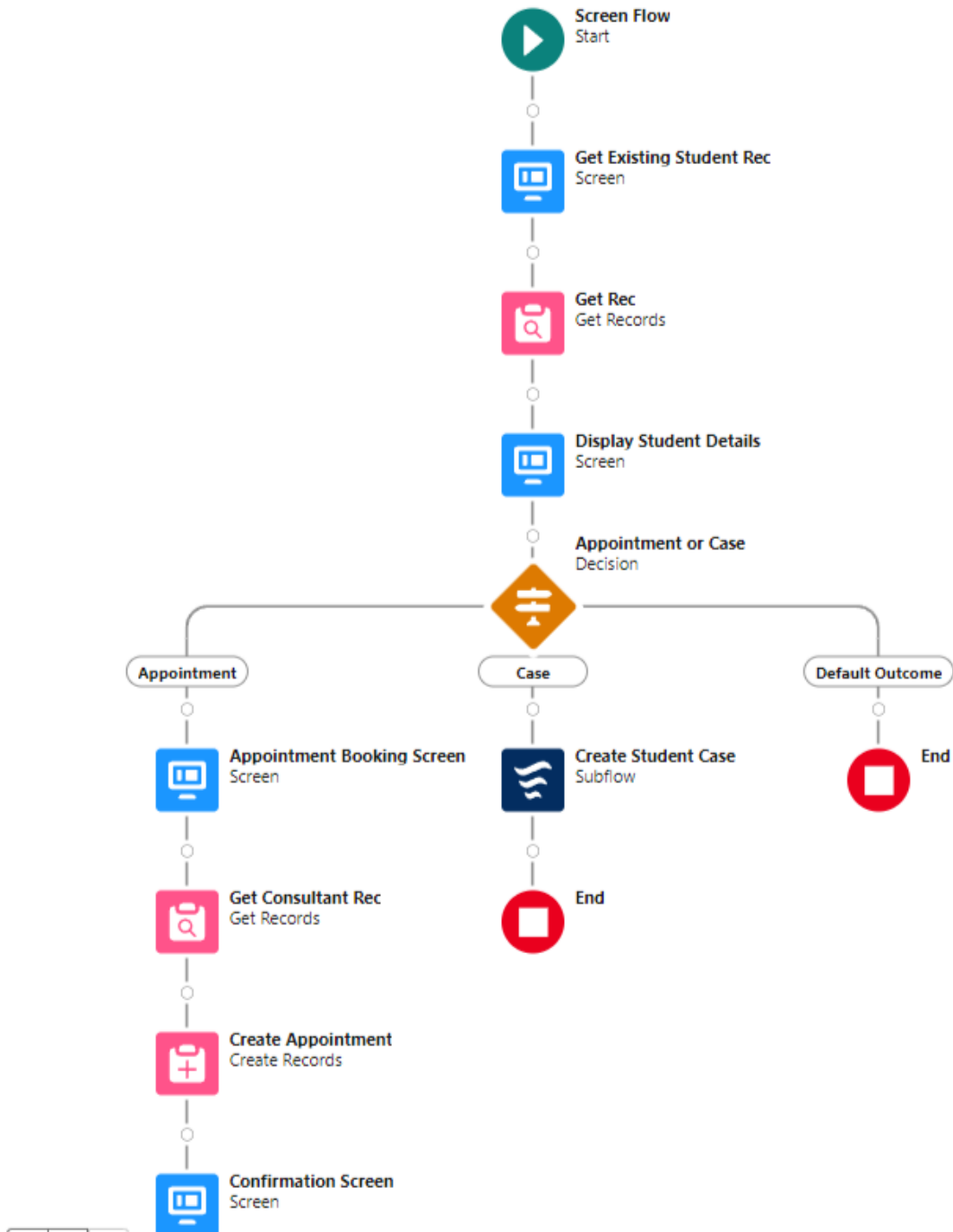
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- Ensure any necessary input variables are set according to the requirements of the "Create a Case" flow.



3. Save the Flow:

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

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:

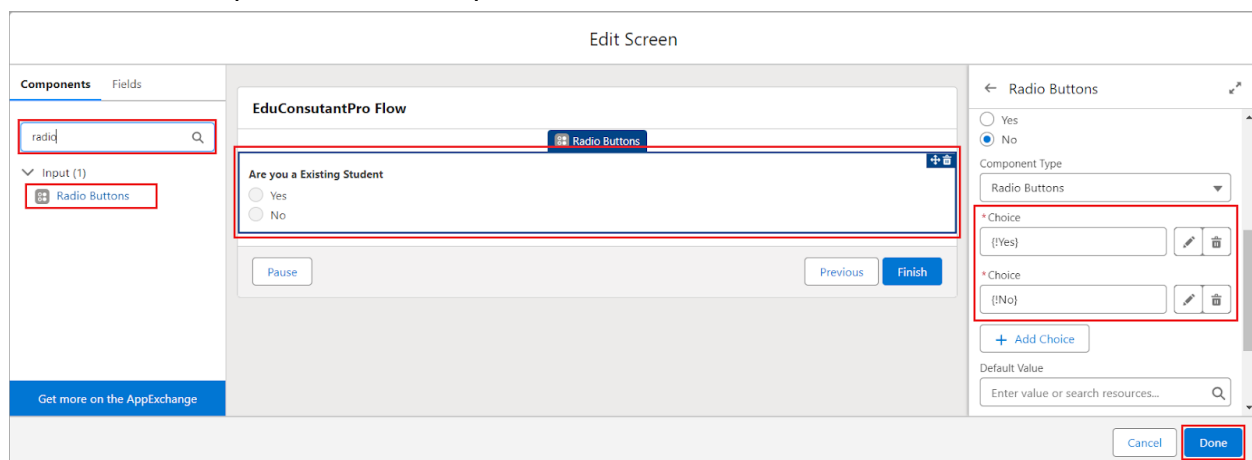
- Drag a **Screen** element onto the canvas after the **Welcome Screen** element.
- Label it as **"Existing or New Student Confirmation Screen"**.

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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 Edit Subflow
Existing Student Flow (*Existing_Student_Flow*)

* Label

Existing Student Flow


* API Name


Existing_Student_Flow

Description

Use values from the parent flow to set the inputs for the "EduConsultantPro Existing Student Flow" flow. By default, the parent flow stores all outputs. You can either reference outputs via the API name of the Subflow element or manually assign variables in the parent flow to store individual outputs from the "EduConsultantPro Existing Student Flow" flow.

Referenced Flow

 **EduConsultantPro Existing Student Flow**

Open Referenced Flow 

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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Edit Subflow

New Student Flow (*New_Student_Flow*)



* Label

New Student Flow

* API Name

New_Student_Flow

Description

Use values from the parent flow to set the inputs for the "EduConsultantPro Student Flow" flow. By default, the parent flow stores all outputs. You can either reference outputs via the API name of the Subflow element or manually assign variables in the parent flow to store individual outputs from the "EduConsultantPro Student Flow" flow.

Referenced Flow



EduConsultantPro Student Flow

[Open Referenced Flow](#)

2. Finish Configuration:

- Click **Done**.

3. Save the Flow:

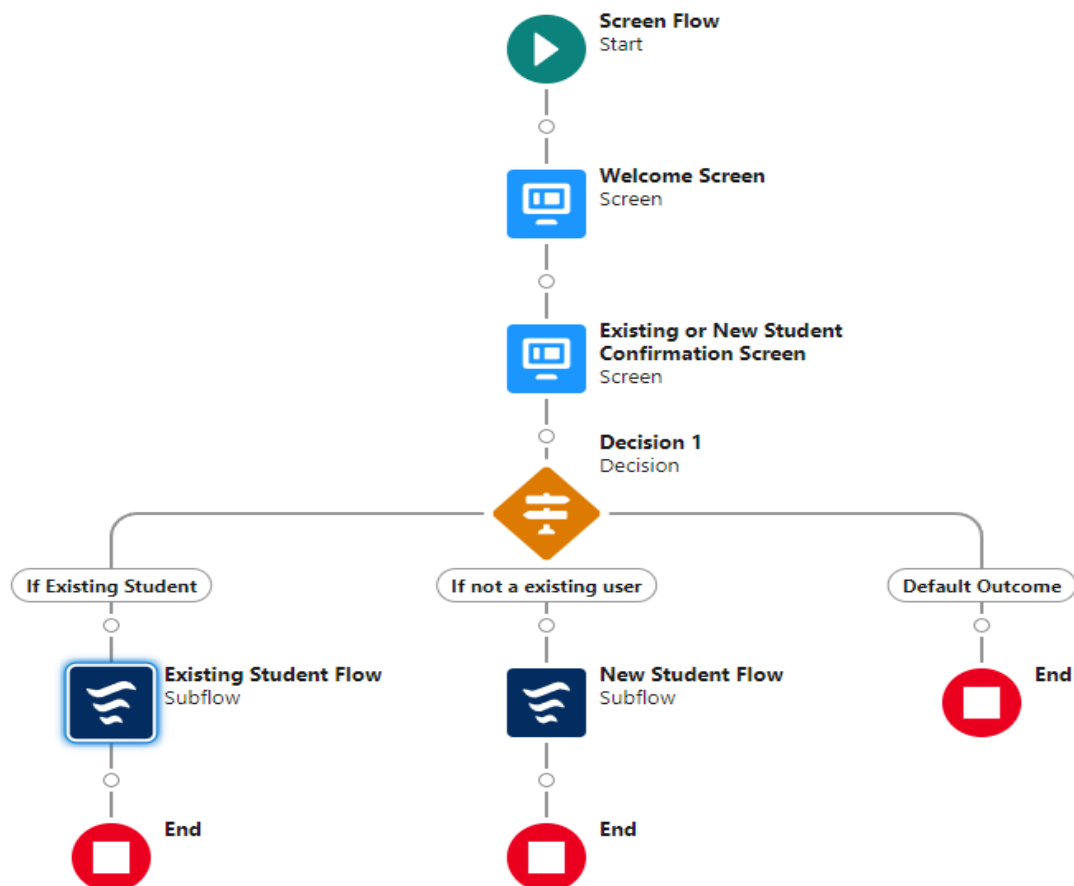
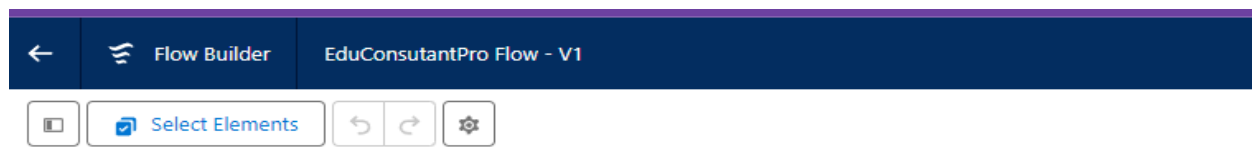
- Label it as "**EduConsultantPro Existing Student Flow**" (as specified).

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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:

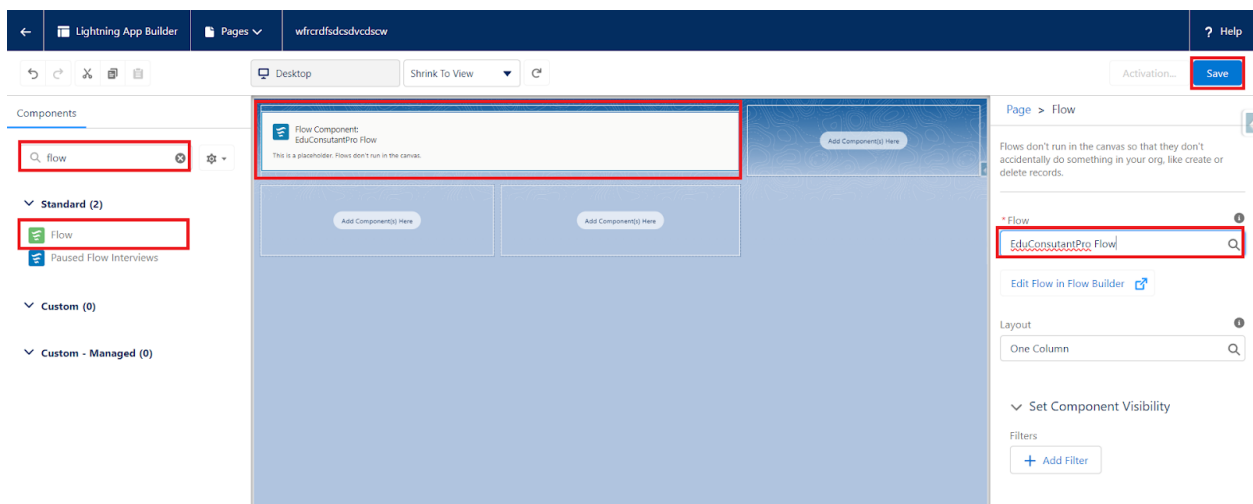
- From Setup, enter **App Builder** in the Quick Find box and click on **Lightning App Builder**.

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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