Project Title: A CRM Application to Manage the Services offered by an Institution

Park College Of Engineering And Technology

Code: **7122**

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Project Abstract

The project involved developing a Salesforce CRM application for EduConsultPro Institute, aimed at improving the management of student admissions, consulting requests, and immigration cases. The system enabled prospective students to submit admission applications online, with data automatically captured in Salesforce and automated email notifications sent to applicants. The project also included managing consulting services, where students could request consultations, and consultants were notified to schedule and manage appointments within the CRM. Additionally, an immigration case management system was implemented to efficiently log, process, and track cases, with automated notifications for agents and robust document management features. This solution significantly streamlined operations and enhanced the overall experience for both students and staff at EduConsultPro.

Table of Contents

INTRODUCTION

EduConsultPro Institute, a prominent educational institution, offers a diverse array of courses and programs to students from various backgrounds. With the institute's increasing popularity, managing the growing number of student admissions, consulting requests, and immigration cases became a significant challenge. To overcome these operational inefficiencies, EduConsultPro embarked on a project to implement a robust Customer Relationship Management (CRM) system using Salesforce.

The project's primary objective was to streamline and automate the institute's core administrative processes. For admission application management, the goal was to enable prospective students to submit their applications through the institute's online portal. This information would be captured directly into the Salesforce CRM, ensuring efficient data handling. Additionally, automated email notifications were set up to acknowledge successful submissions, and tools were provided to admissions staff for generating insightful reports and dashboards, allowing for a deeper analysis of application metrics, acceptance rates, and enrollment trends.

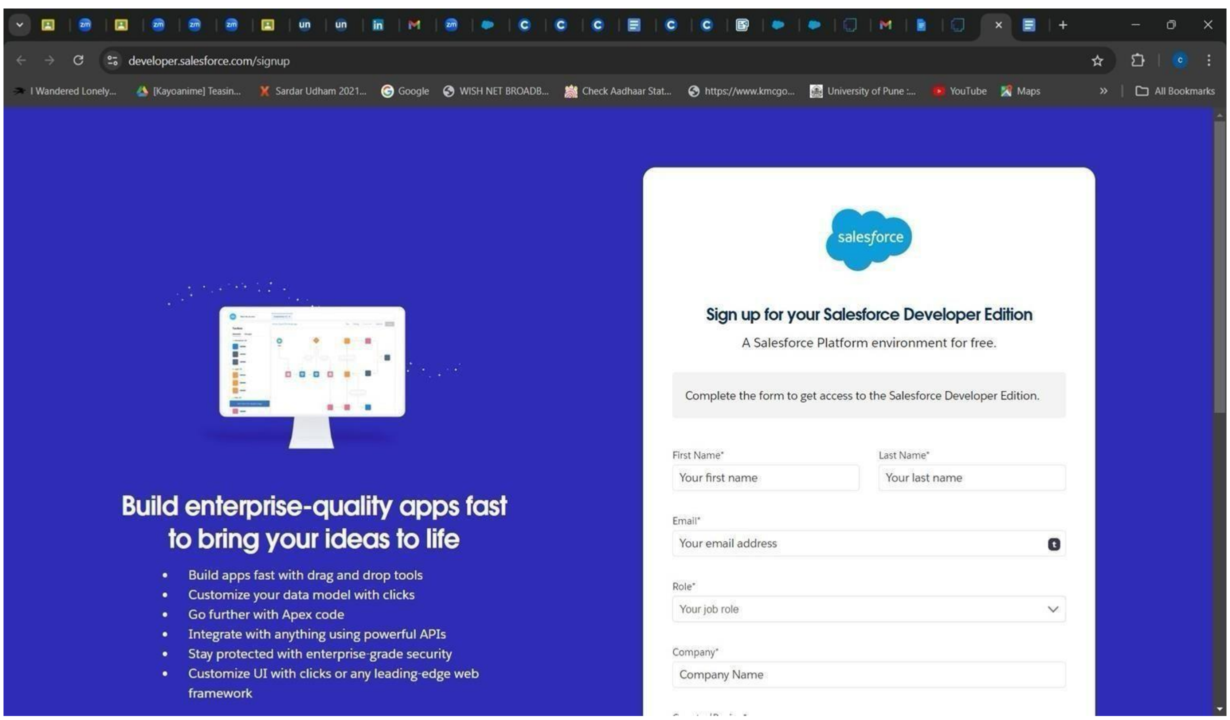
In terms of consulting services management, the project focused on creating a seamless process where students could request consulting services via the institute's website. These requests would be recorded in Salesforce, triggering automated notifications to consultants who could then schedule and manage appointments within the CRM. This ensured that the scheduling process was organized, and the status of each appointment, whether scheduled, completed, or canceled, was tracked effectively.

Another critical component was the implementation of an immigration case management system. Students could initiate immigration cases through various channels such as phone, email, or web. These cases were then logged into Salesforce, with immigration agents receiving immediate notifications to take action. The system also included tools for tracking case statuses and managing related documents, ensuring that every case was processed efficiently and transparently.

This comprehensive Salesforce solution not only addressed the immediate operational needs of EduConsultPro but also set the foundation for future scalability, enabling the institution to provide an enhanced and streamlined experi

TASK 1: Creating Developer Account

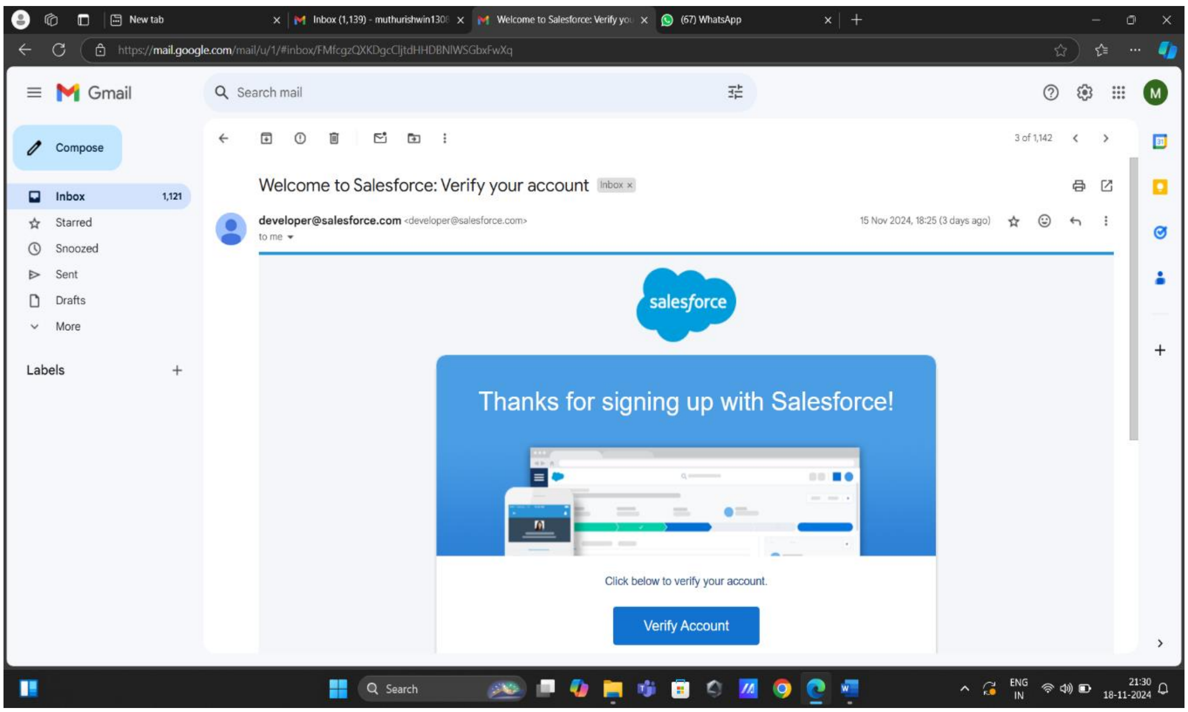
1. Go to https://developer.salesforce.com/signup
2. Fill up form with personal information

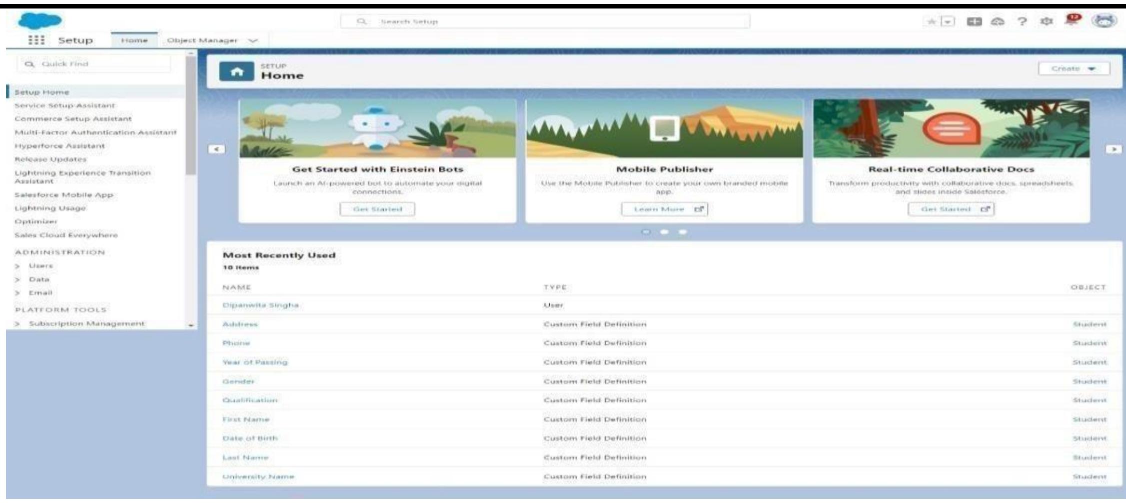


TASK 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.

2. Give a password and answer a security question and click on change password.
3. Then you will redirect to your salesforce setup page.


New tab
Inbox (1,139) - muthurishwin130
Welcome to Salesforce: Verify yo
(67) WhatsApp
https://mail.google.com/mail/u/1/#inbox/FMfcgzQXKDgcCljtdHHDBNlWSGbxFwXq
Gmail
Search mail
Compose
Inbox 1,121
Starred
Snoozed
Sent
Drafts
More
Labels
3 of 1,142
Welcome to Salesforce: Verify your account Inbox
developer@salesforce.com <developer@salesforce.com>
to me
15 Nov 2024, 18:25 (3 days ago)
salesforce
Thanks for signing up with Salesforce!
Click below to verify your account.
Verify Account
Search
ENG IN
21:30
18-11-2024

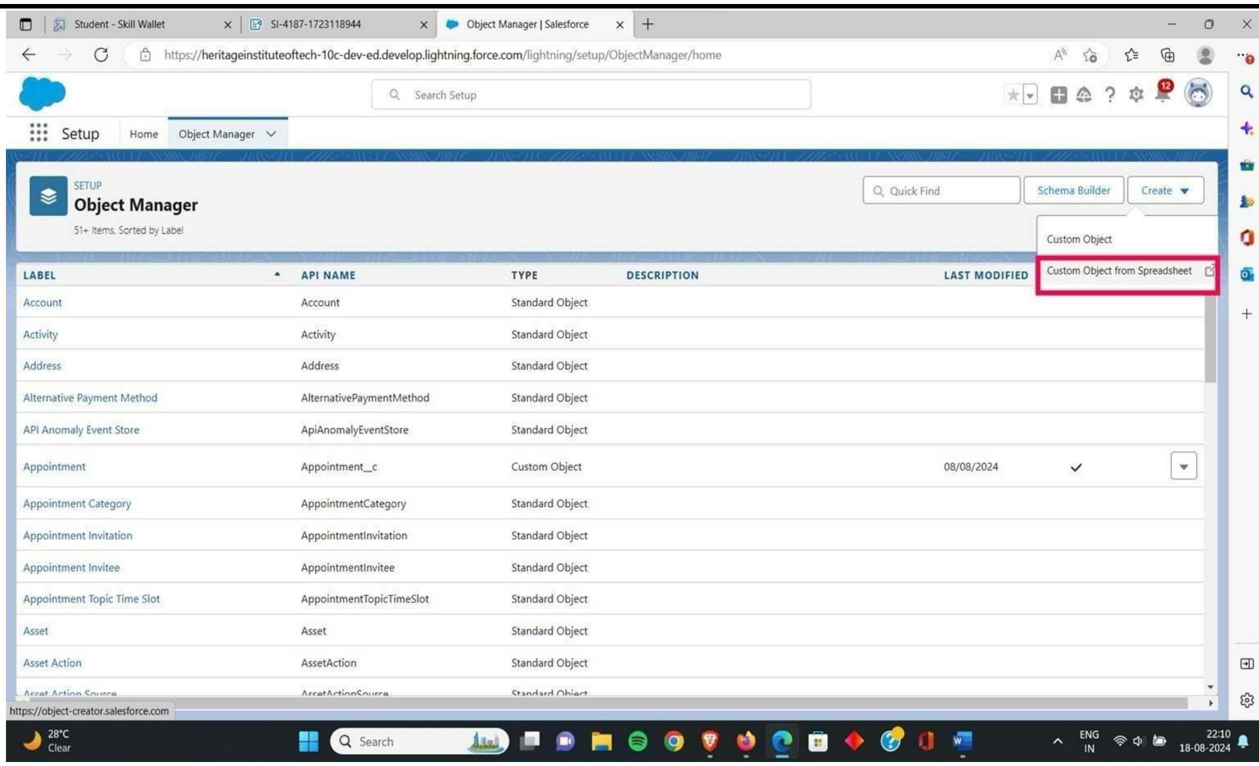

Setup
Home
Object Manager
Search Setup
Quick Find
Setup Home
Service Setup Assistant
Commerce Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
SETUP
Home
Create
Get Started with Einstein Bots
Get Started
Mobile Publisher
Learn More
Real-time Collaborative Docs
Get Started
Most Recently Used
10 Items
NAME
TYPE
OBJECT
User
Address
Custom Field Definition
Student
Phone
Year of Passing
Gender
Qualification
First Name
Date of Birth
Last Name
University Name

TASK 3: Create Objects from Spreadsheet

This task involves directly creating objects in Salesforce by importing data from spreadsheets and establishing relationships between them.

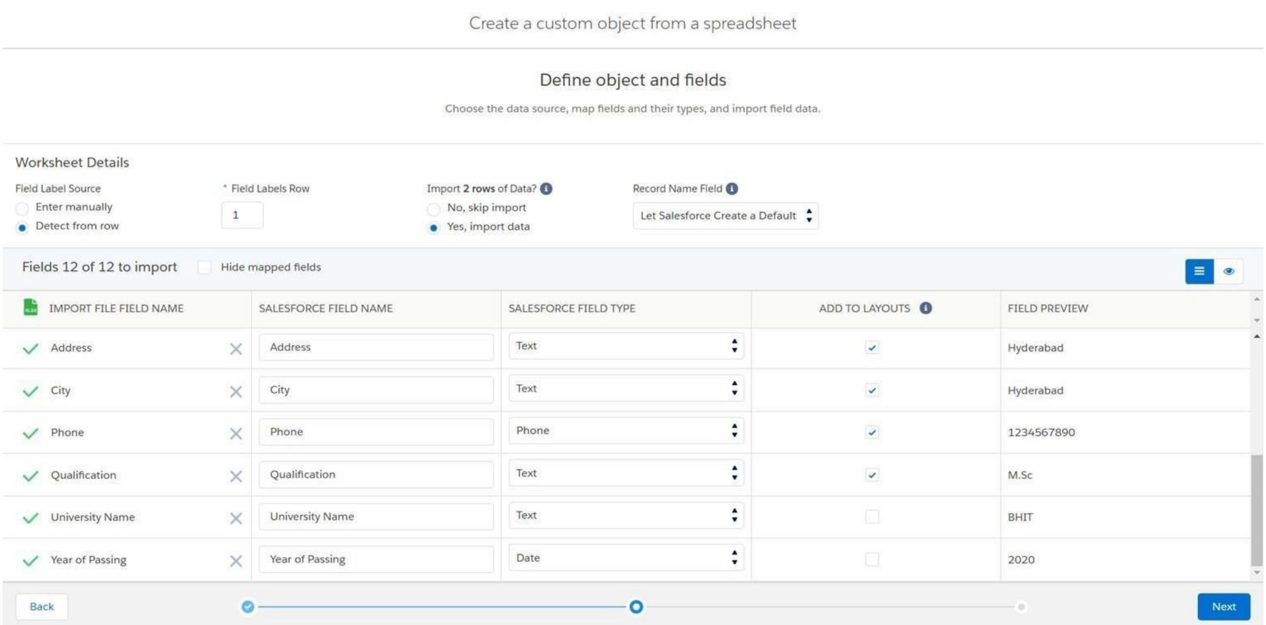
Subtask 1: Create Course Object

1. Navigate to **Object Manager**. 2. Click on **Create Object from Spreadsheet**.

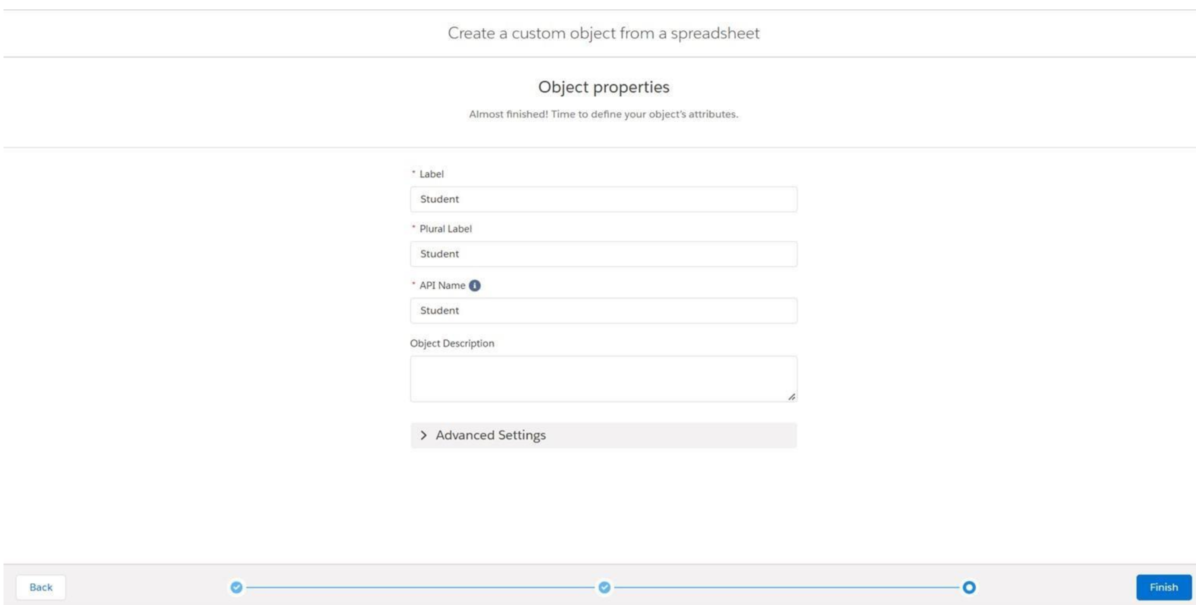

Student - Skill Wallet
SI-4187-1723118944
Object Manager | Salesforce
https://heritageinstituteoftech-10c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
51+ Items, Sorted by Label
Quick Find
Schema Builder
Create
Custom Object
Custom Object from Spreadsheet
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
Account
Activity
Address
Alternative Payment Method
API Anomaly Event Store
Appointment
Appointment__c
Custom Object
08/08/2024
Appointment Category
Appointment Invitation
Appointment Invitee
Appointment Topic Time Slot
Asset
Asset Action
Standard Object
https://object-creator.salesforce.com

3. Upload the spreadsheet to Salesforce.

4. Map the fields from the spreadsheet to the object fields.



5. Define the Object properties



6. Following the same steps create the following objects:

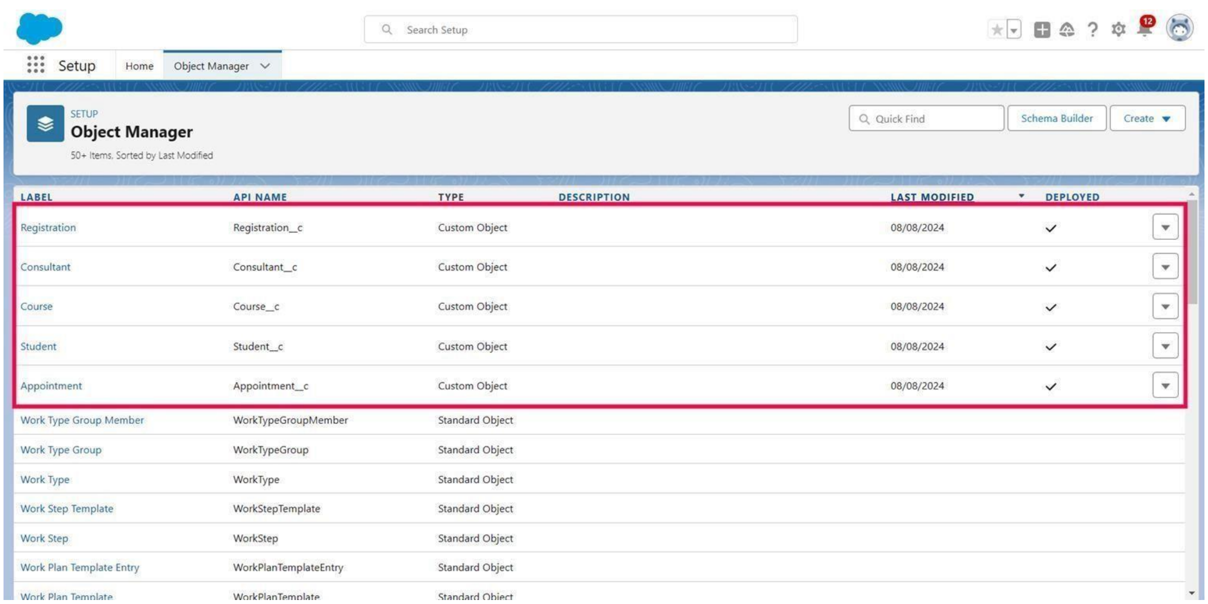
   a. **Consultant**

   b. **Student**

   c. **Appointment**

d. Registration

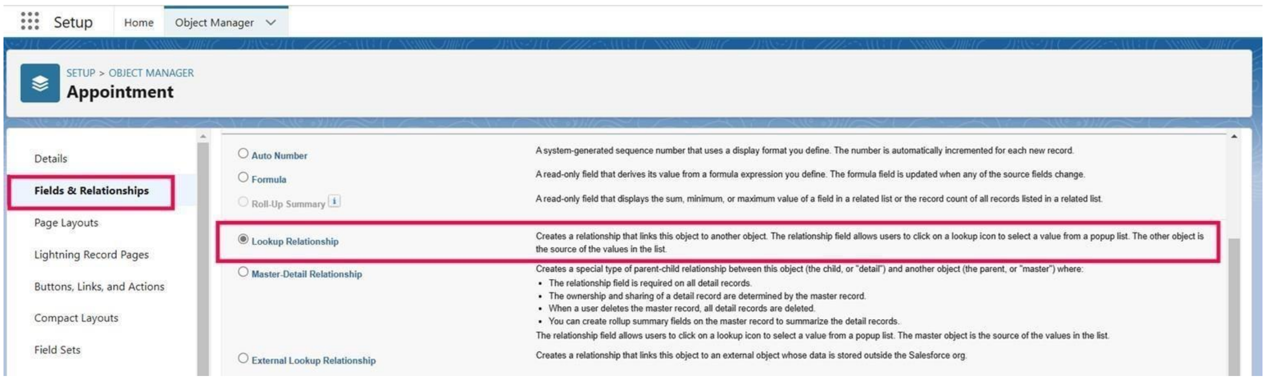
11



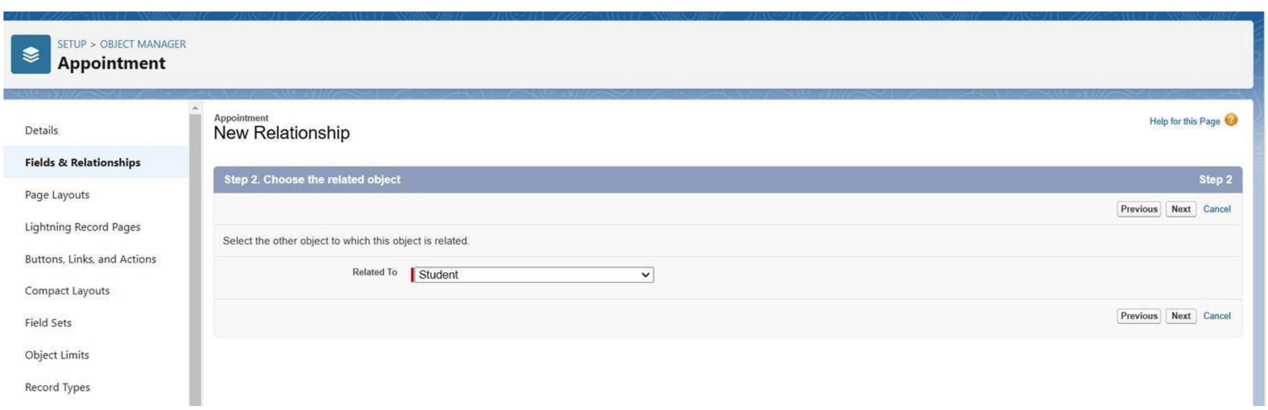
Subtask 2: Create Relationships Among the Objects

1. Create a **Lookup relationship** between **Appointment** and **Student Object**

   a. Go to the Appointment object and create a new custom field from **Fields & Relationships** and choose the field type **Lookup relationship**



b. Choose the related object for the relationship as **Student**



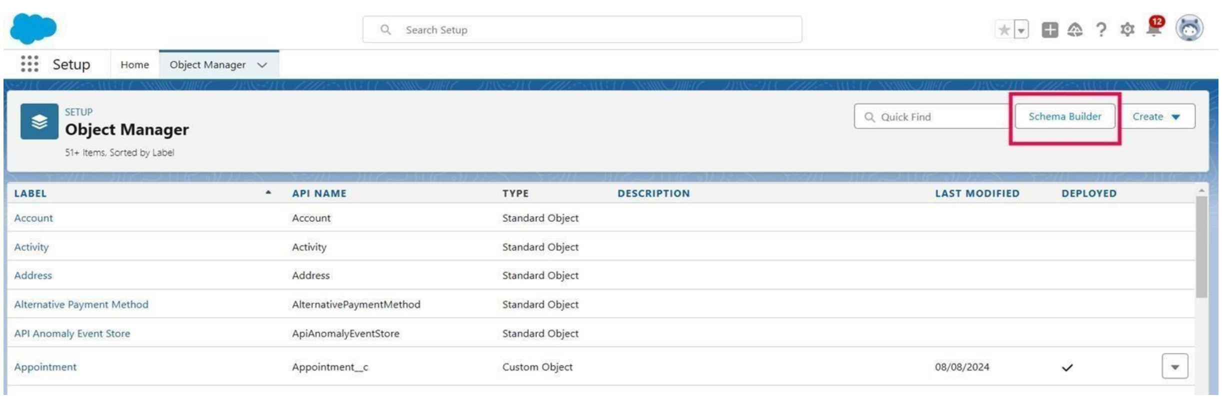
2. In the same way create **Lookup relationship** between the following:

- **Appointment** and **Student Object**

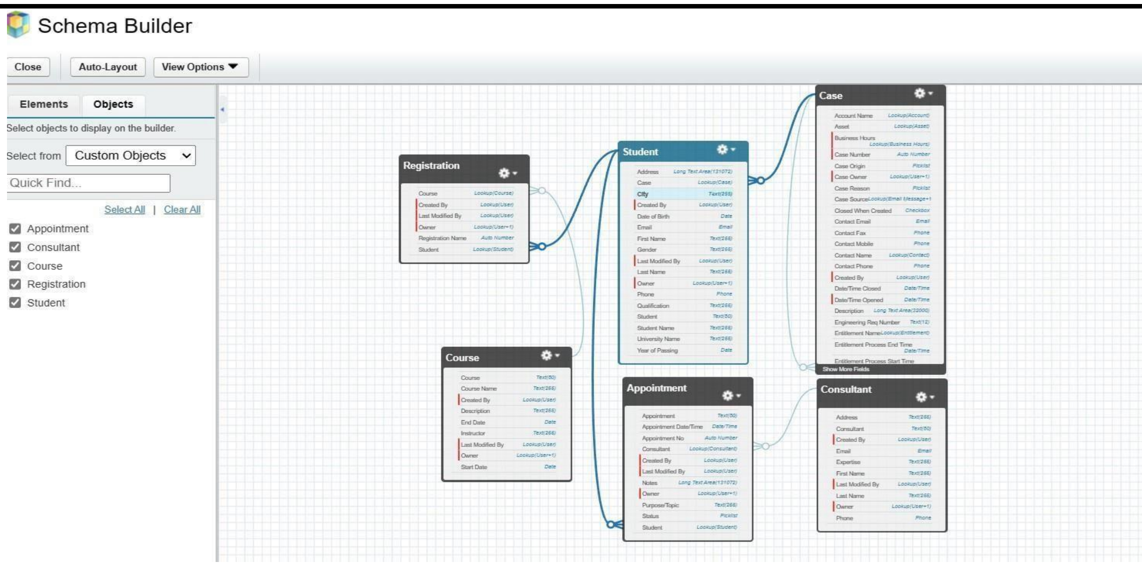
▪ **Student** and **Case Object**

The Lookup relationship **Student** and **Case Object** is to manage student queries related to immigration or visa applications.

3. Go to the **Schema Builder** to see the relationship between the objects.

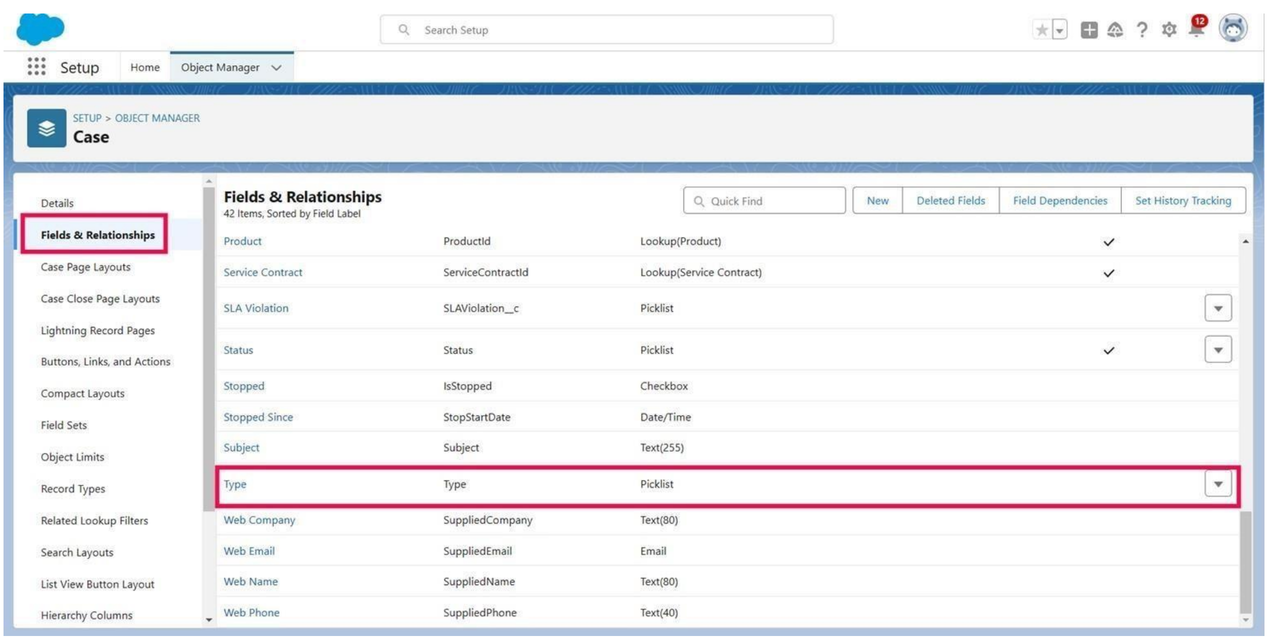


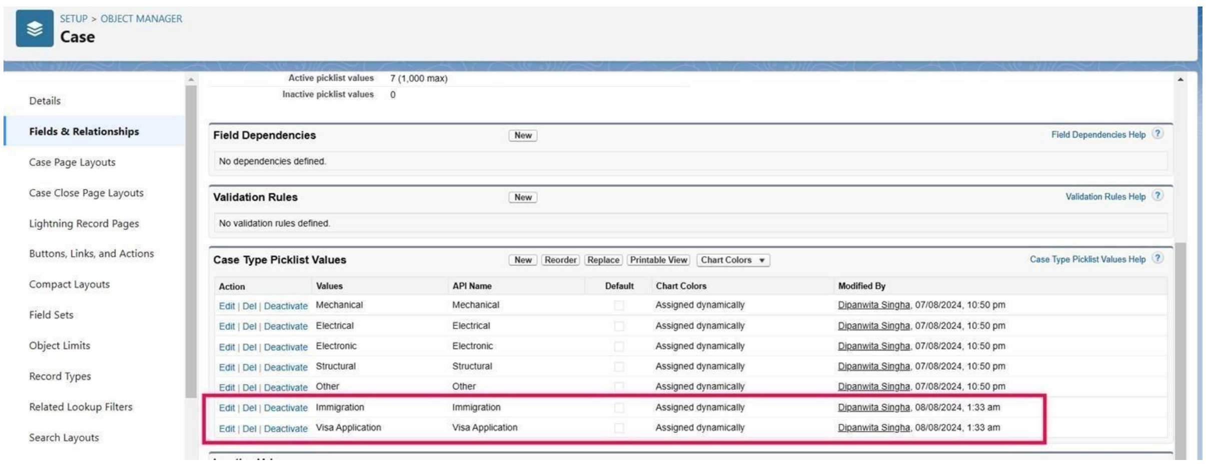
4. The data model will look like this:


Schema Builder
Close
Auto-Layout
View Options
Elements
Objects
Select objects to display on the builder.
Select from
Custom Objects
Quick Find...
Select All | Clear All
Appointment
Consultant
Course
Registration
Student
Registration
Student
Case
Course
Appointment
Consultant

Subtask 3: Configure the Case Object

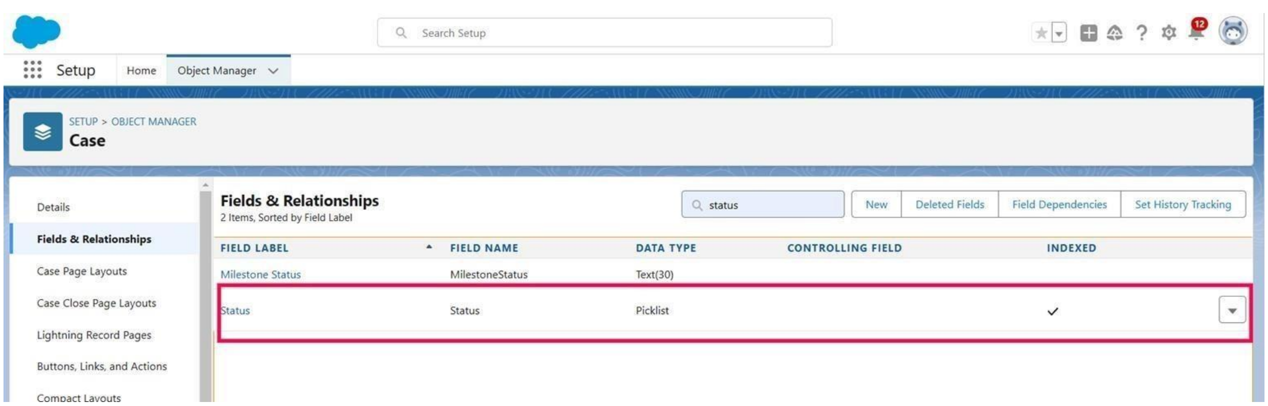
1. Navigate to **Object Manager**, then select the **Case** object.
2. Edit the **Type** field and add the following values:
    - **Immigration**
    - **Visa Application**

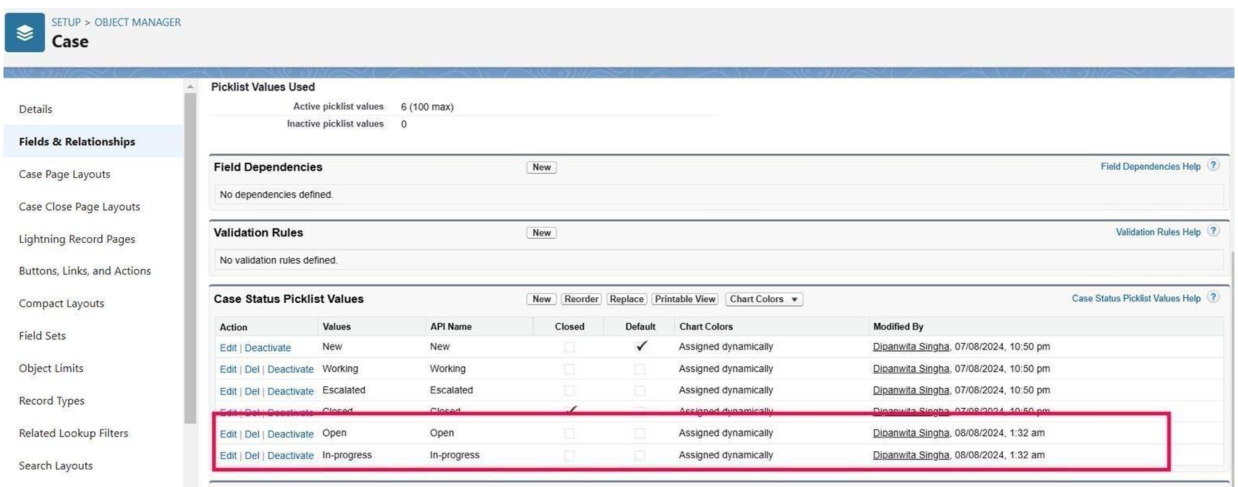




3. Edit the **Status** field and add the following values:

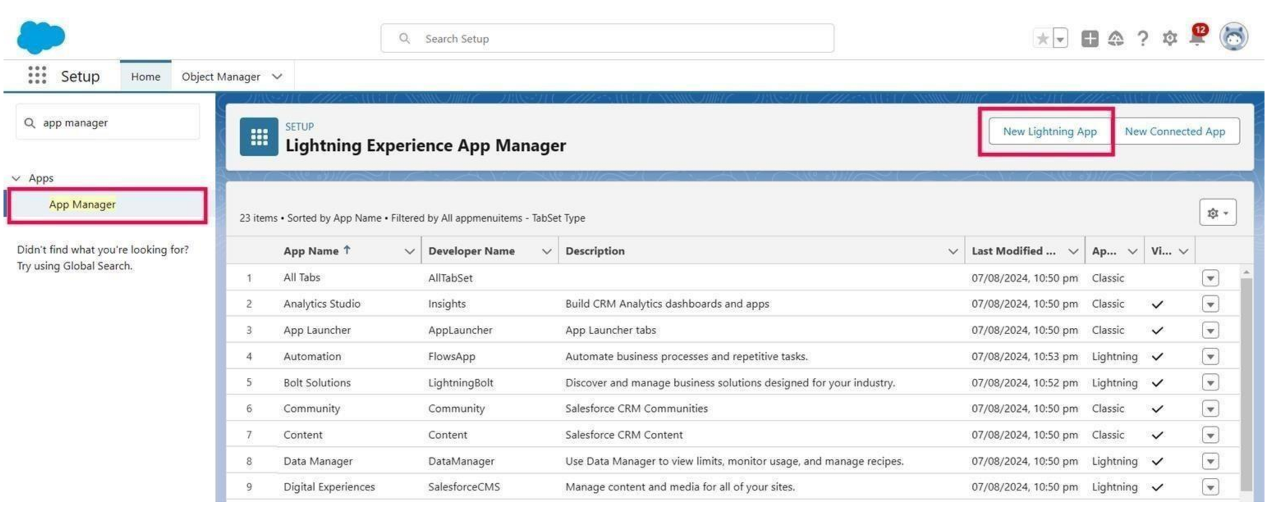
- **Open**
- **In-progress**



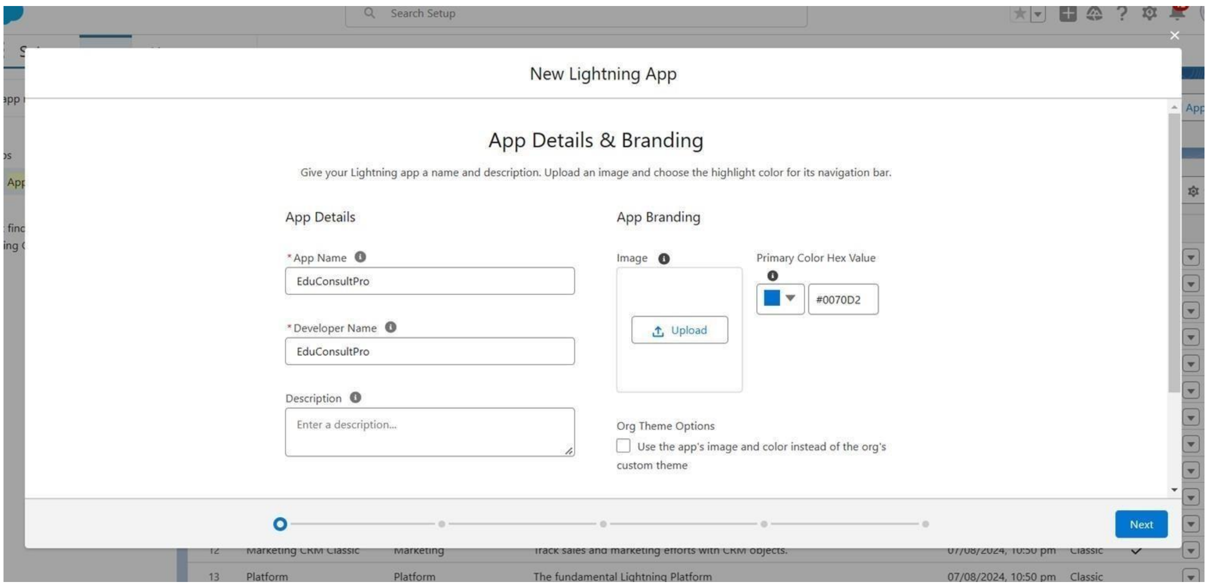


Subtask 4: Create a Lightning App

1. In **Setup**, search for **App Manager** in the Quick Find bar.
2. Click on **New Lightning App**.



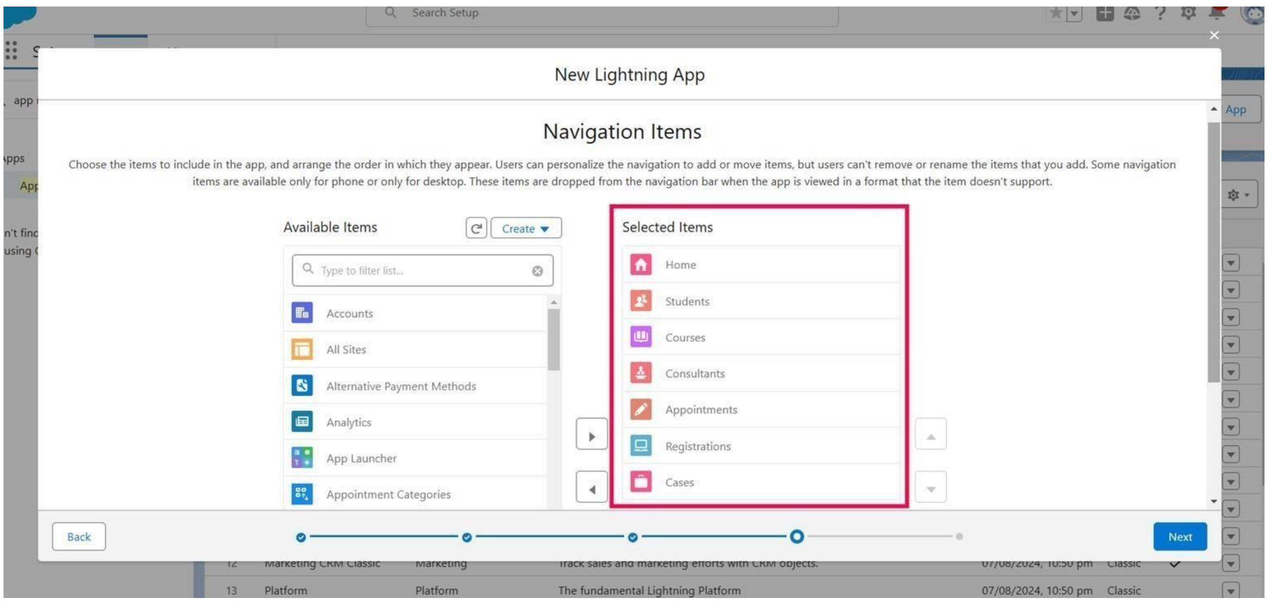
3. Name the app **EduConsultPro.** 17



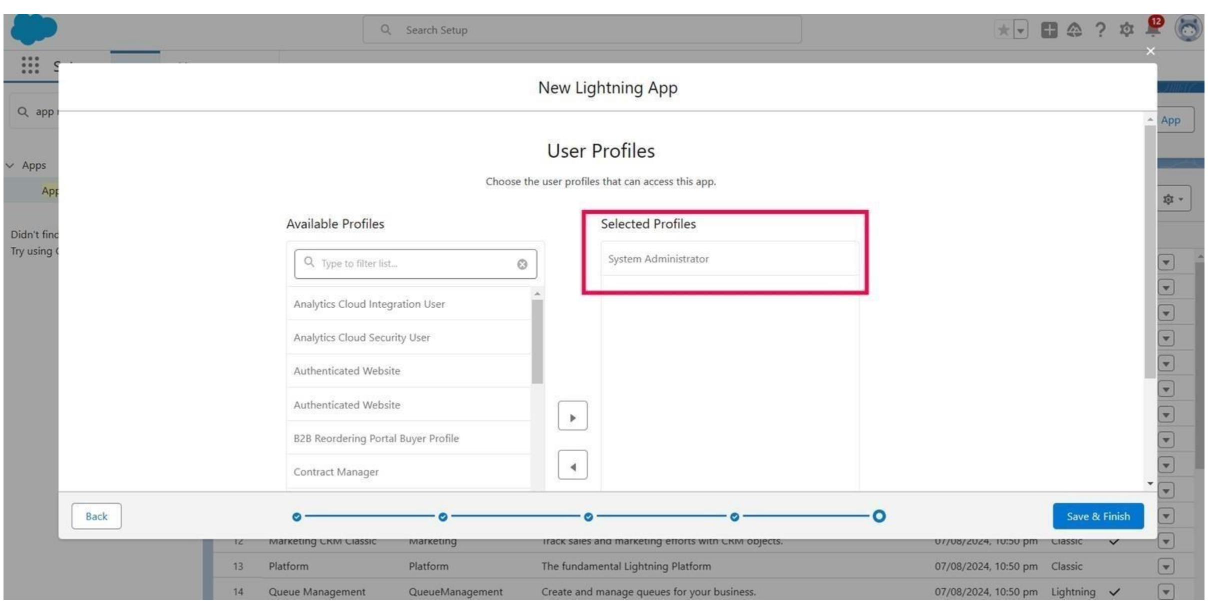
4. Add the following items from the Available Items list to the Selected Items list:

☐ **Home**, **Students**, **Courses**, **Consultants**, **Appointments**, **Registrations**, **Cases**

18



5. Add the **System Administrator** profile from Available Profiles to Selected Profiles and click **Save & Finish**.



6. **EduConsultPro** app is created.

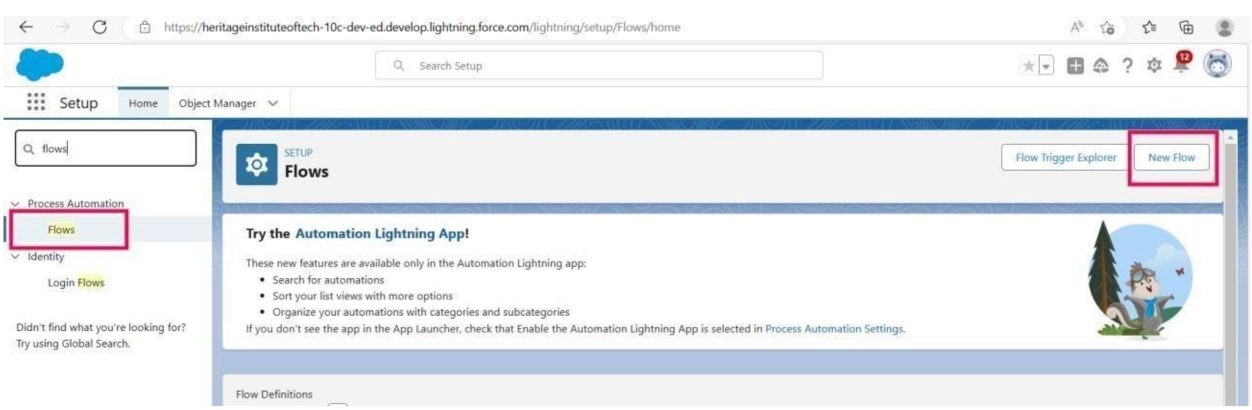
TASK 4: Create A ScreenFlow For Student Admission Application Process

Design a ScreenFlow to automate the student admission process, including data capture, record creation, course selection, and email notifications.

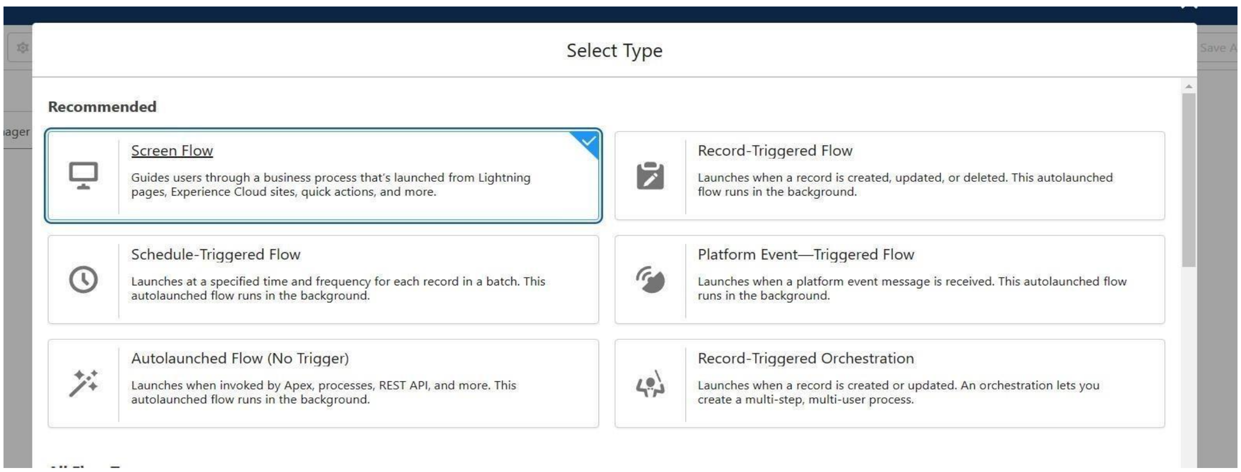
Subtask 1: Add Screen Element

Set up a screen to capture student information.

1. Navigate to **Setup**, enter **Flow** in the Quick Find box, and select **New Flow**. Choose **ScreenFlow**.

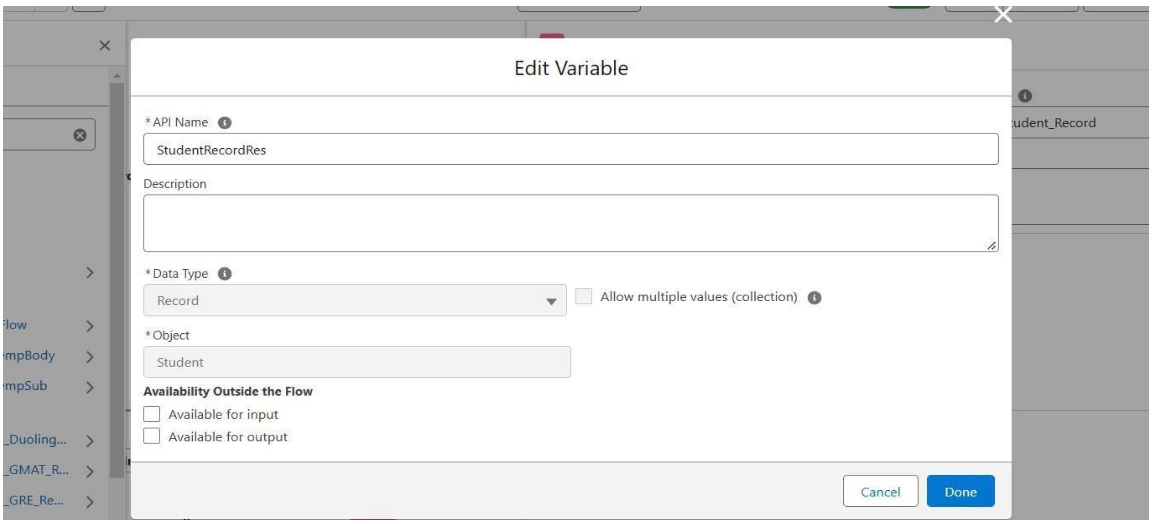


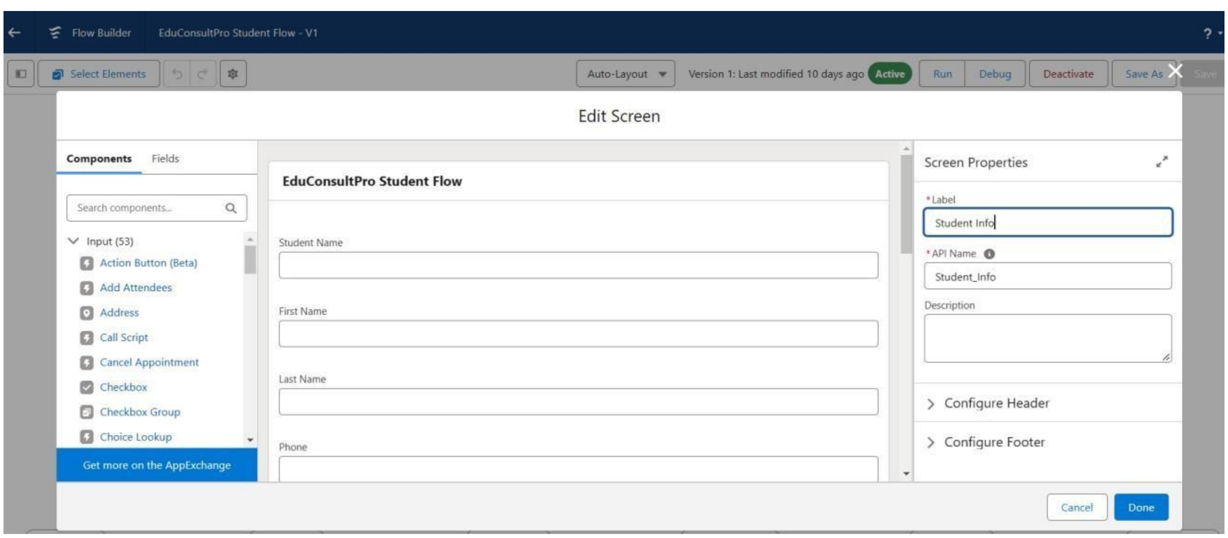
20



2. Add a **Screen** element.

3. In the **Screen Properties** pane:
   - **Label:** Enter "Student Info".
   - **Fields:** Create a new **Resource** (StudentRecordRes) to display all fields from the **Student** object.
   - **Action:** Drag and drop the necessary fields to collect student information on the screen like the Student Name, First Name, Last Name, Phone, Email, DoB, Address, City, Qualification.



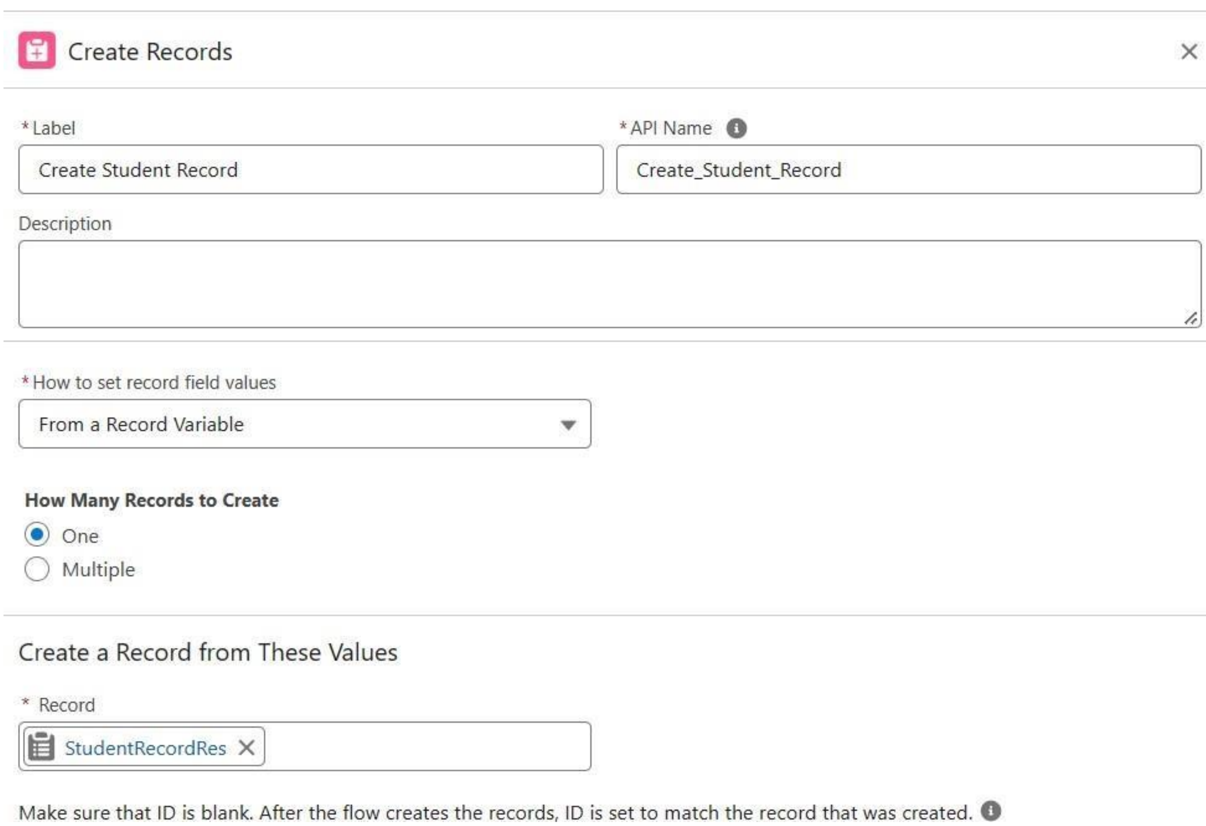


Subtask 2: Create Student Record Using Create Element

Set up a process to create a student record from the captured information.

1. Add a **Create** element after the Student Info screen element.
2. **Label:** “Create Student Record”. **22**

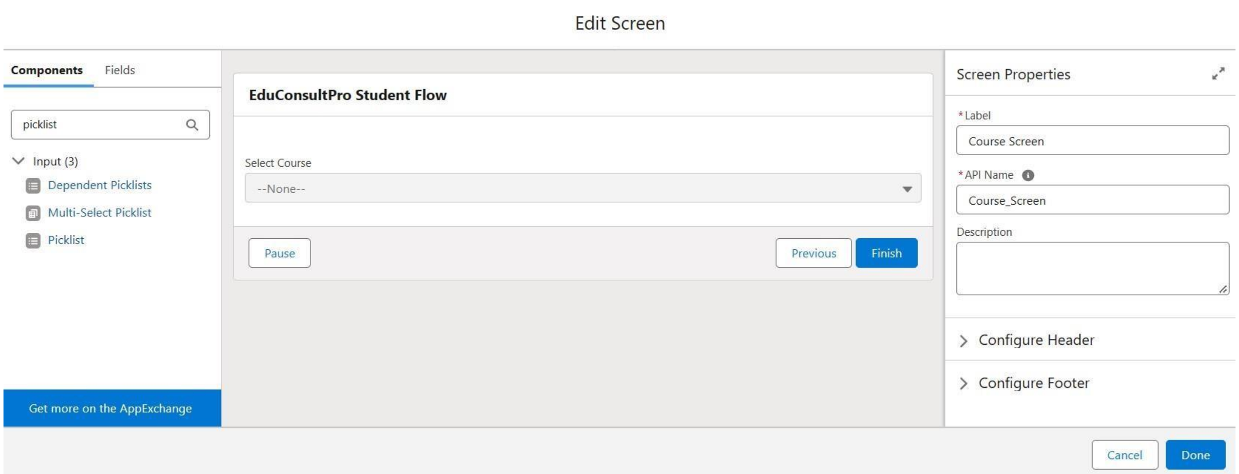
3. Select “**One**” under **How many records to Create**.
4. Choose “**Use all values from a record**” under **How to Set the record fields**.
5. Select the **StudentRecordRes** variable from the Student Info screen element under **Create a record from these values**.



Subtask 3: Add Course Selection Screen

Provide a screen for students to select a course.

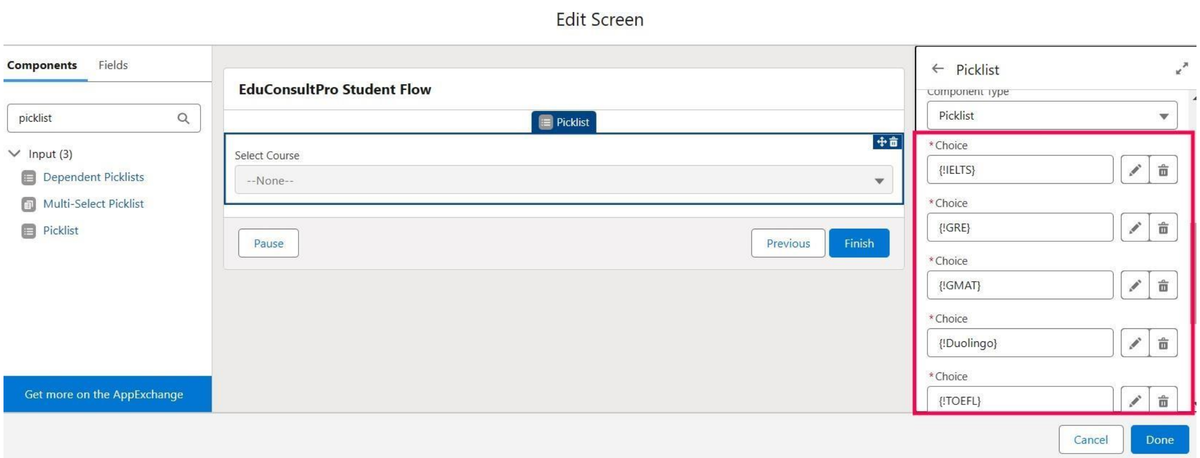
1. Add a **Screen** element after the Create Student Record element. 2. **Label:** “Course Screen”.



3. Add a **Picklist** component:

- **Label:** “Select Course”.
- **Choices:** Enter “IELTS”, “GRE”, “GMAT”, “Duolingo”, and “TOEFL”.

24



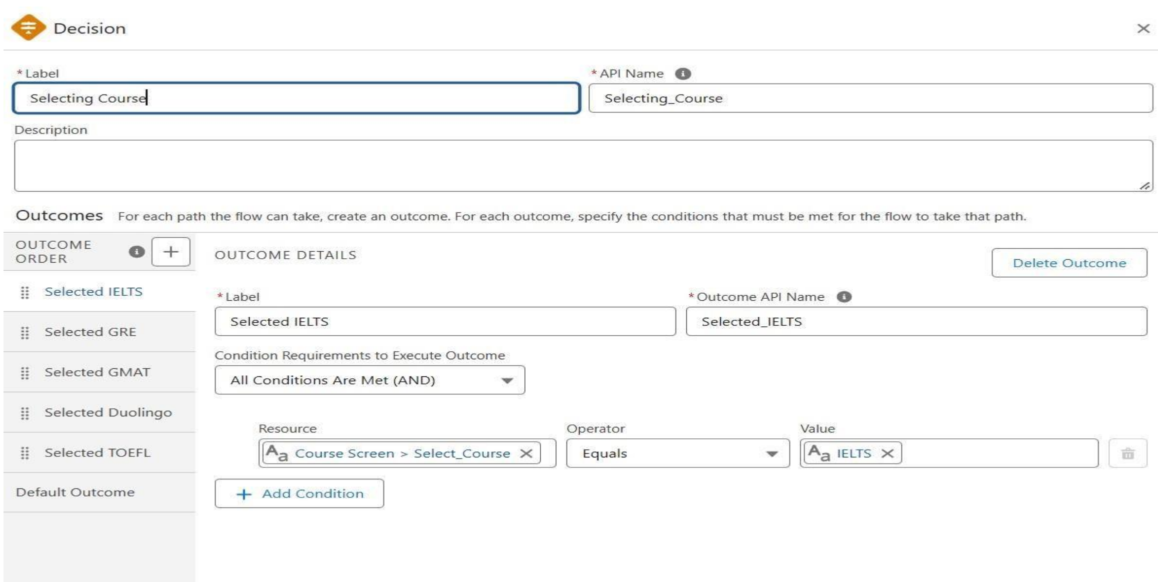
Subtask 4: Add Decision Element

Define logic to determine which course has been selected.

1. Add a **Decision** element after the Course Screen.
2. **Label:** “Selecting Course”.
3. Define outcomes for each course:
   - **Outcome Label:** “Selected IELTS”.
   - **Condition:**
     - **Resource:** Select_Course (Screen Component from Select Course Screen Element)
     - **Operator:** Equals
     - **Value:** IELTS (Choice Variable from Select Course Screen Element) ▪

Repeat for GRE, GMAT, Duolingo, TOEFL.

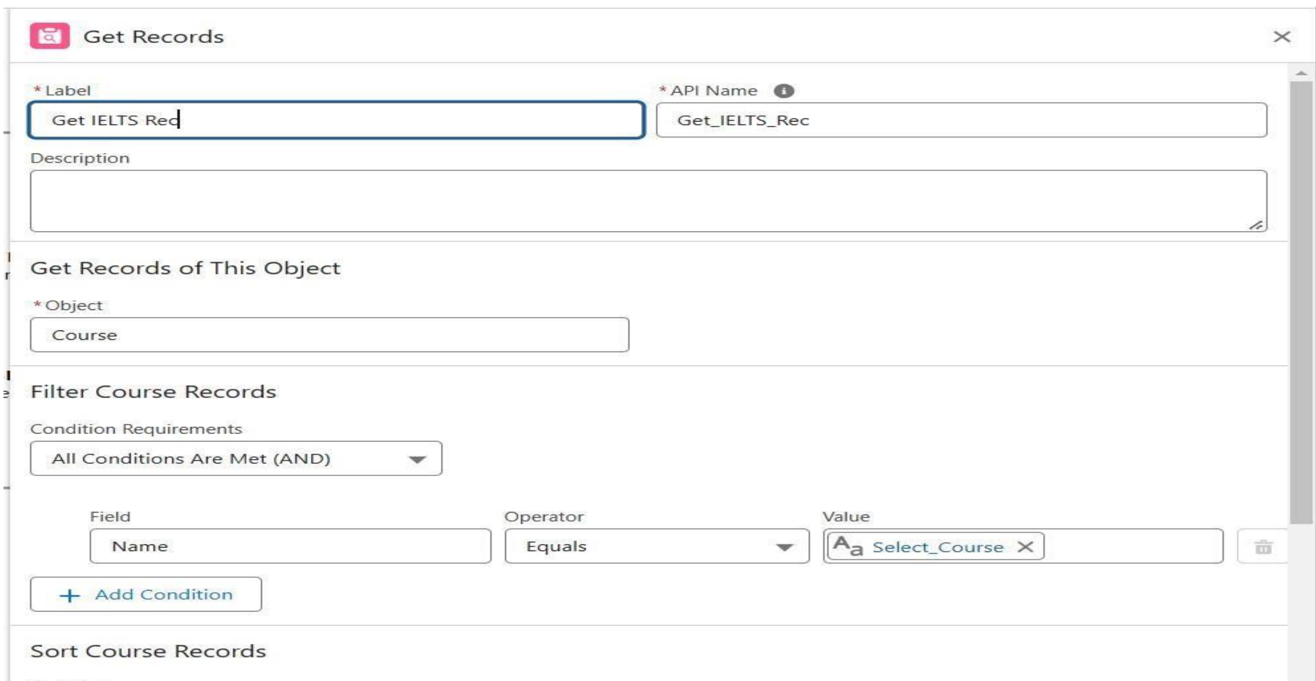
25



Subtask 5: Add GET Record Element

Retrieve course details based on the selected course.

1. Add a **GET Record** element after each Decision path (IELTS, GRE, GMAT, etc.).
2. **Label:** “Get [Course Name] Rec”.
3. **Object:** Course
4. **Condition Requirement:** All Conditions are Met (AND)
5. **Field:** Course Name
6. **Operator:** Equals
7. **Value:** {!Select_Course}



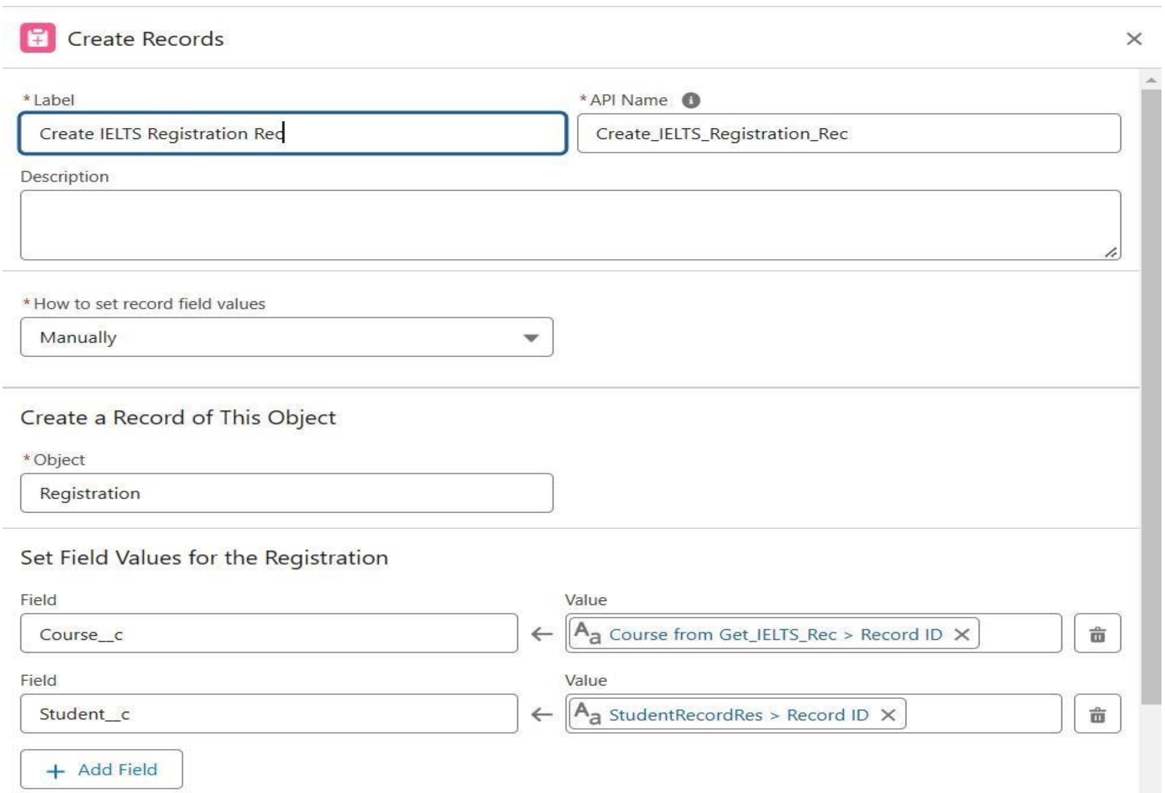
Subtask 6: Create Registration Record Using Create Records Element

Create a registration record for the selected course.

1. Add a **Create** element after each GET Record element.
2. **Label:** “Create [Course Name] Registration Rec”.
3. **How many records to Create:** “One”.
4. **How to Set the record fields:** Use separate resources, and literal values. 5. **Object:** Registration

6. Set fields:

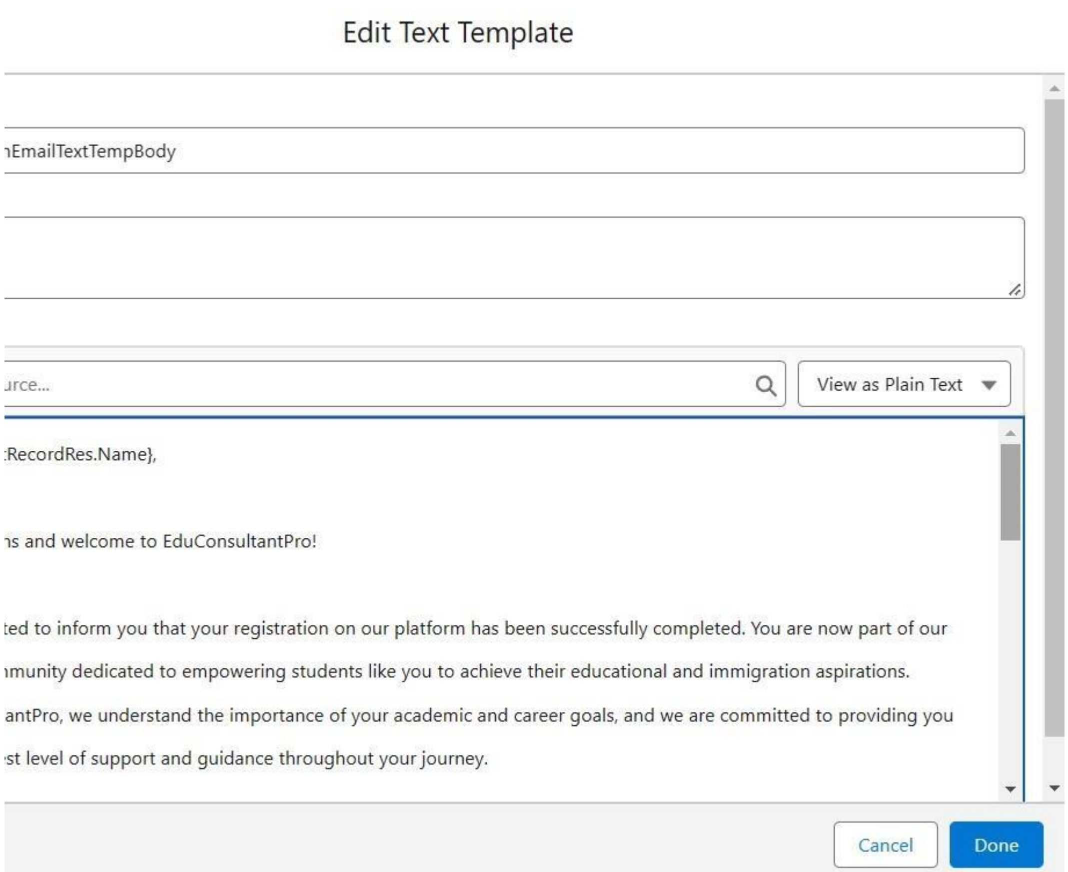
▪ **Course_Name_c:** {!Get_[Course Name]_Rec.Id} ▪ **Student_Name c:** {!StudentRecordRes.Id}



Subtask 7: Create Email Text Template Variables

Set up email templates for student registration confirmation.

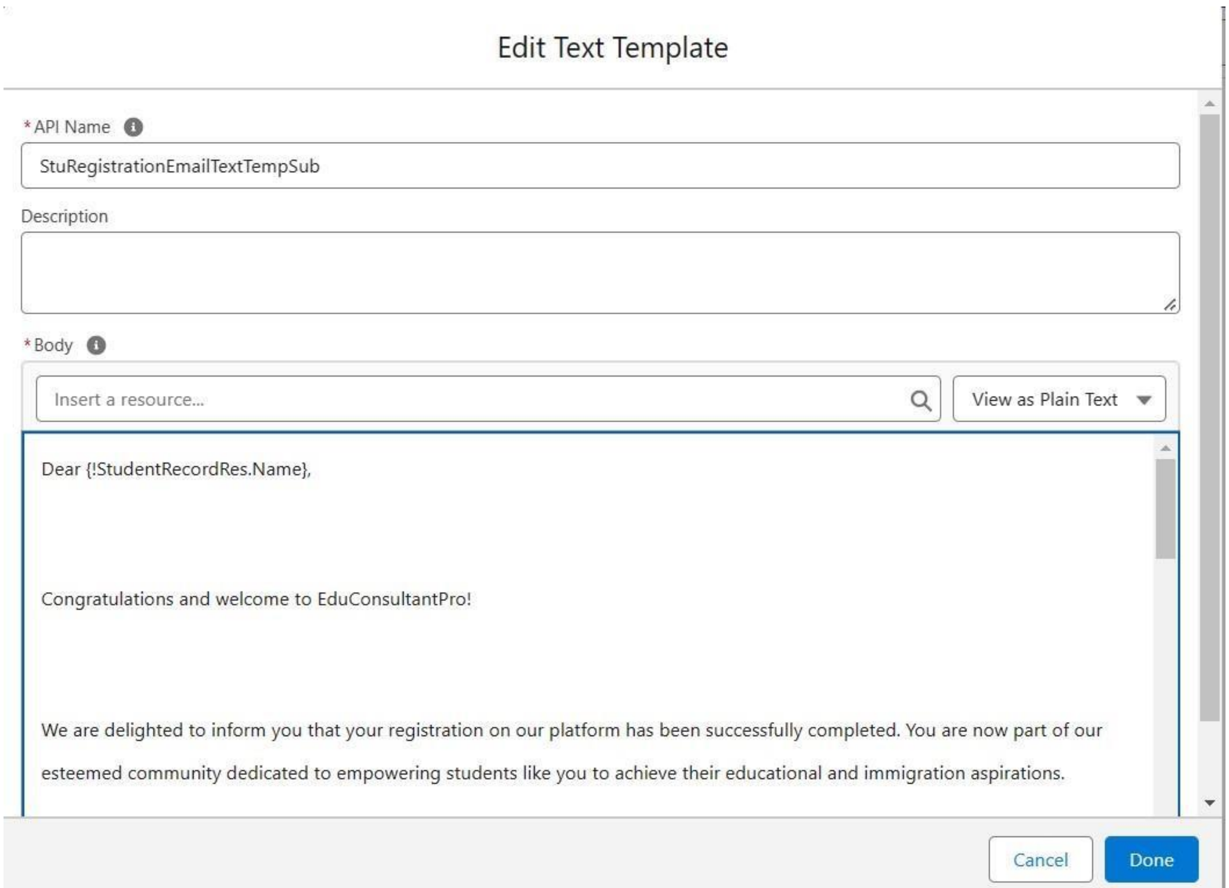
1. Click the **toggle toolbox** on the left corner, select **New Resource**, and choose **Text Template**.
2. **API Name:** “StuRegistrationEmailTextTempBody”.
3. **Type:** View as plain text.
4. **Body:** Write a registration confirmation text.



5.

Repeat to create an email text template for the subject, **API Name:**

“StuRegistrationEmailTextTempSub”.

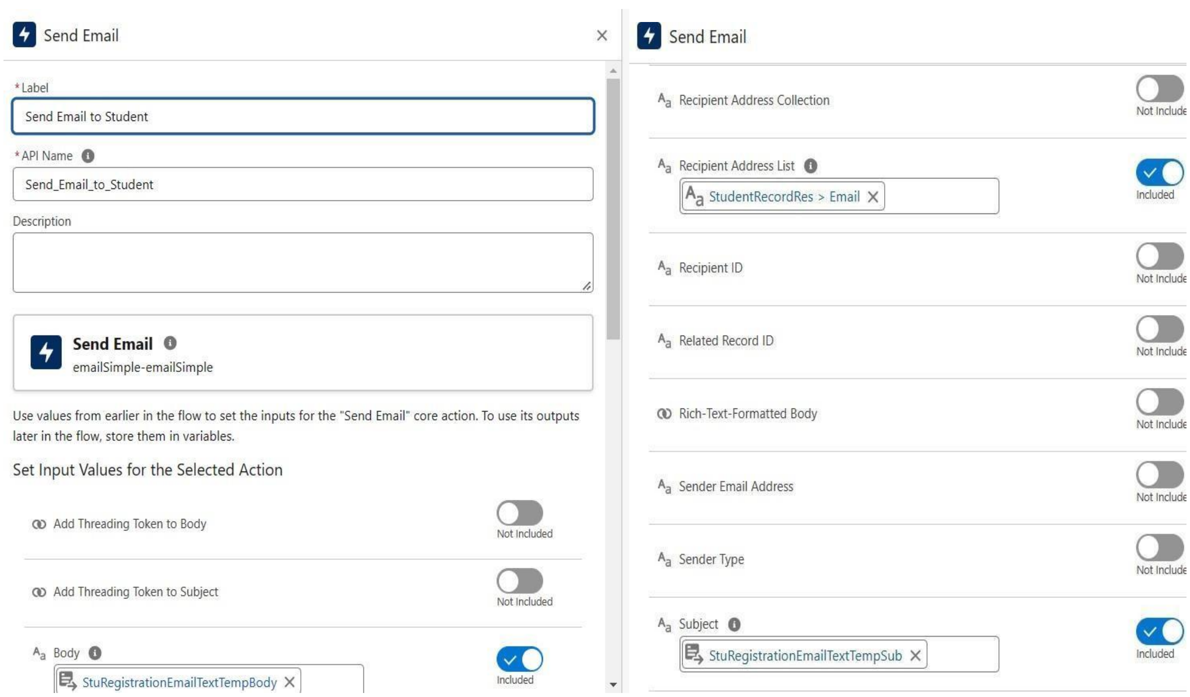


Subtask 8: Add Action Element

Configure the action to send an email to the student.

1. Add an **Action** element after all Decision paths.
2. **Label:** "Send Email to Student".
3. **Input Values:**

- **Body:** {!StuRegistrationEmailTextTempBody}
- **Recipient Address List:** {!StudentRecordRes.Email_c}
- **Subject:** {!StuRegistrationEmailTextTempSub}

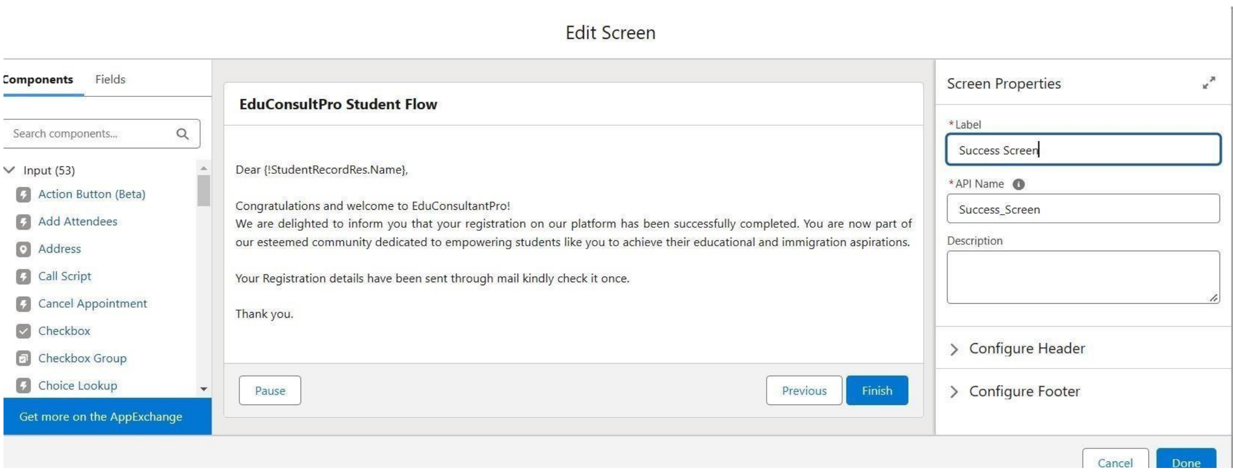


Subtask 9: Add Success Screen

Display a confirmation message to the student after the registration.

1. Add a **Screen** element after the Send Email to Student Action Element.
2. **Label:** “Success Screen”.
3. Add a **Display Text** component:
   - **Label:** “SuccessMessage”.

- **Text:** Write the success message.



4. Save the flow and name it **"EduConsultPro Student Flow"**.

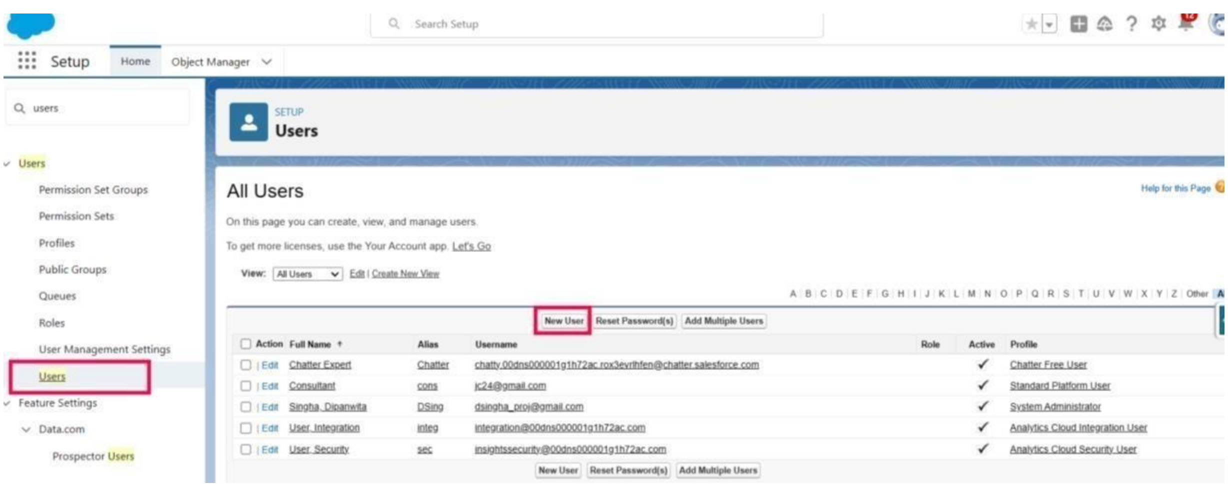
Task 5: Create Users

Set up a new user with the Standard Platform User profile and configure the user settings.

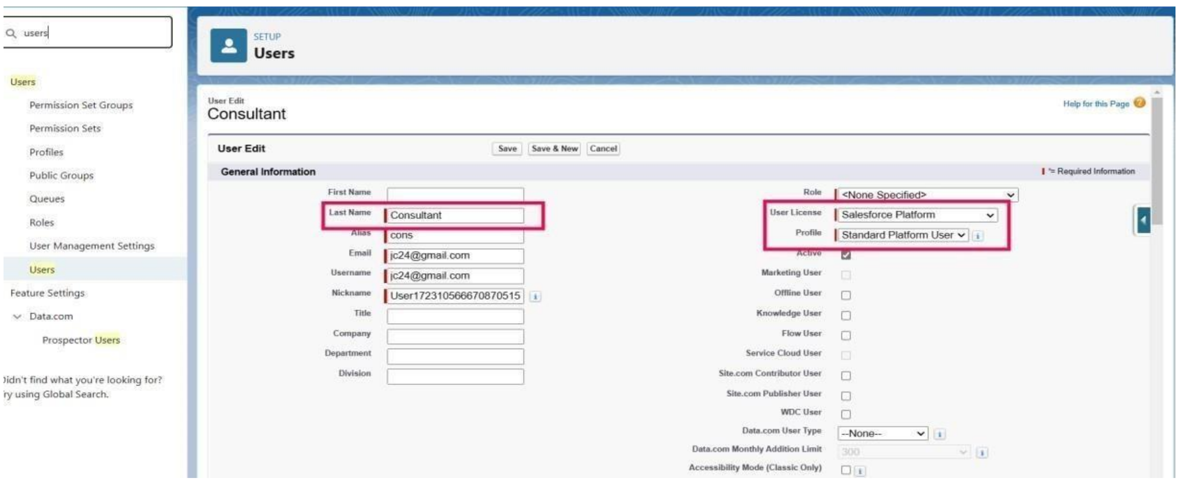
Subtask 1: Create a User

Create a new user with the Standard Platform User profile.

1. Navigate to **Setup** > **Users** > **New User**.



2. Enter the following details:
    - **Last Name:** Consultant
    - **License:** Salesforce Platform
    - **Profile:** Standard Platform User
3. Complete all mandatory fields as required and save.

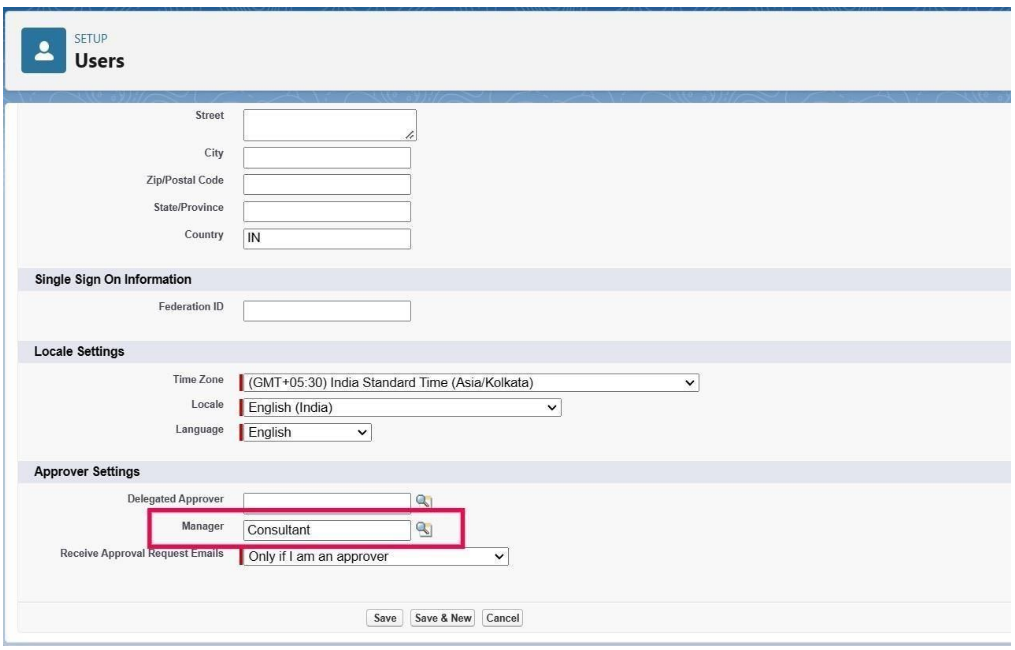


Subtask 2: Configure the User Settings

Update the user settings to include the appropriate approver settings.

1. Navigate to **Setup** > **Administration** > **Users** > Locate the newly created user and click **Edit** next to their name.
2. Scroll down to the **Approver Settings** section.
3. In the **Manager Field**, select “Consultant” and save.

34



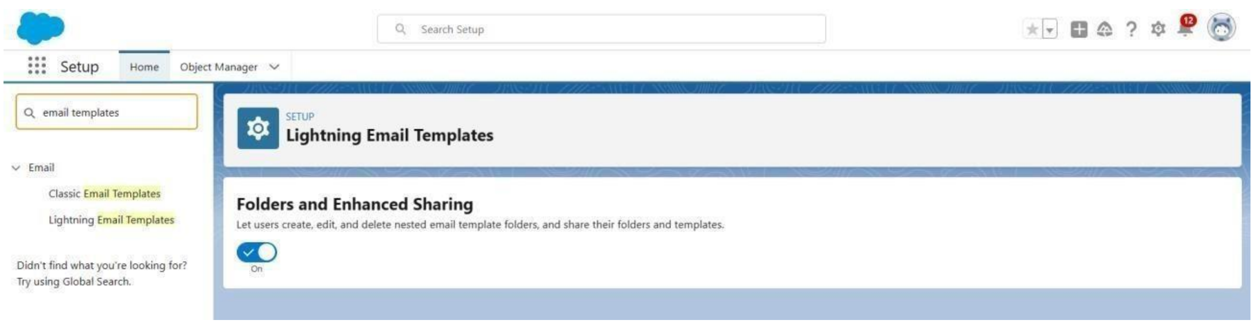
Task 6: Create an Approval Process for the Property Object

Establish an approval process for the Property object, including creating necessary email templates for notifications.

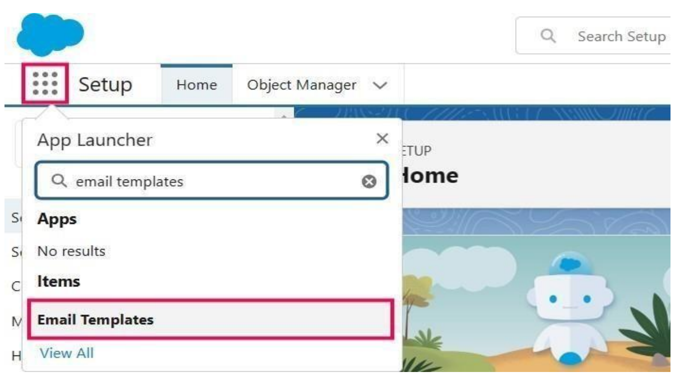
Subtask 1: Create Email Templates

Create and configure email templates to be used in the approval process.

1. Navigate to **Setup**, enter **Templates** in the Quick Find box, and select **Lightning Email Templates**. Toggle on.

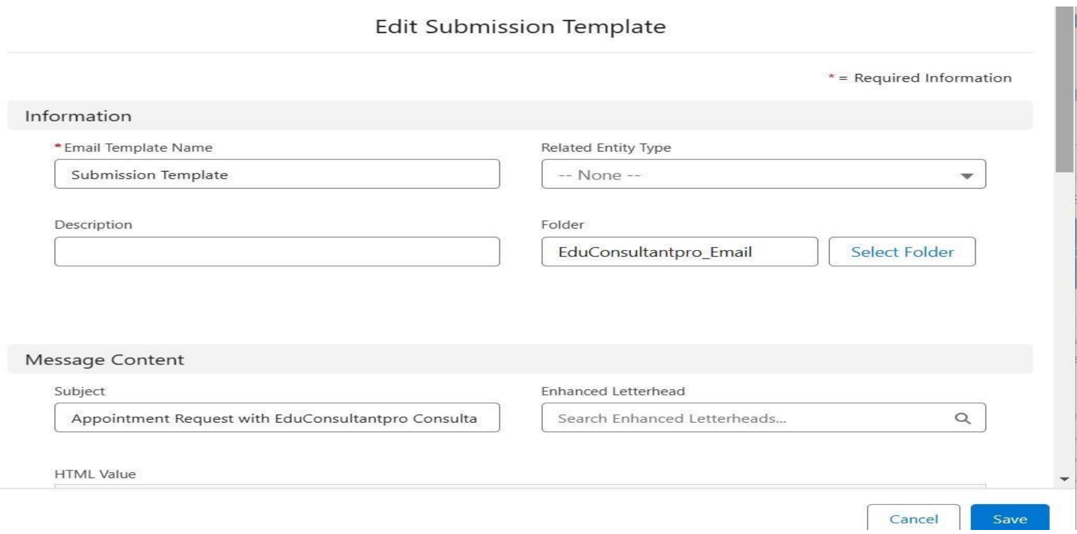


2. Go to the **App Launcher**, search for **Email Templates**, and create a new folder with the desired name.



3. Create a new email template within the created folder:

▪ **Template Name:** Submission Template ▪
Write a message in the HTML Value



Edit Submission Template

* = Required Information

Information

*Email Template Name: Submission Template

Related Entity Type: -- None --

Description:

Folder: EduConsultantpro_Email

Select Folder

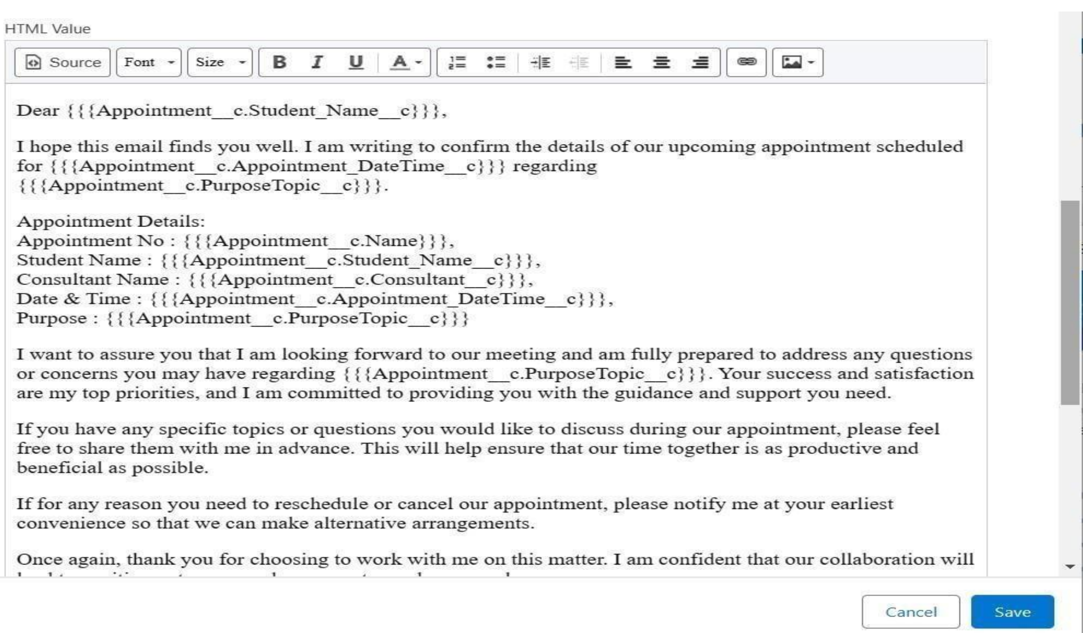
Message Content

Subject: Appointment Request with EduConsultantpro Consulta

Enhanced Letterhead: Search Enhanced Letterheads...

HTML Value

Cancel | Save



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}}},
Consultant Name : {{{Appointment__c.Consultant__c}}},
Date & Time : {{{Appointment__c.Appointment_DateTime__c}}},
Purpose : {{{Appointment__c.PurposeTopic__c}}}

I want to assure you that I am looking forward to our meeting and am fully prepared to address any questions or concerns you may have regarding {{{Appointment__c.PurposeTopic__c}}}. Your success and satisfaction are my top priorities, and I am committed to providing you with the guidance and support you need.

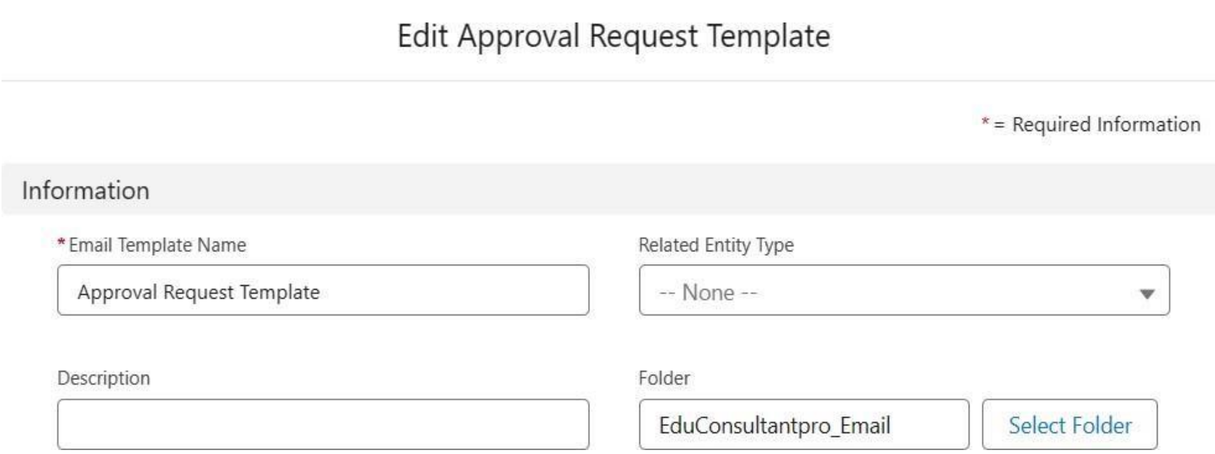
If you have any specific topics or questions you would like to discuss during our appointment, please feel free to share them with me in advance. This will help ensure that our time together is as productive and beneficial as possible.

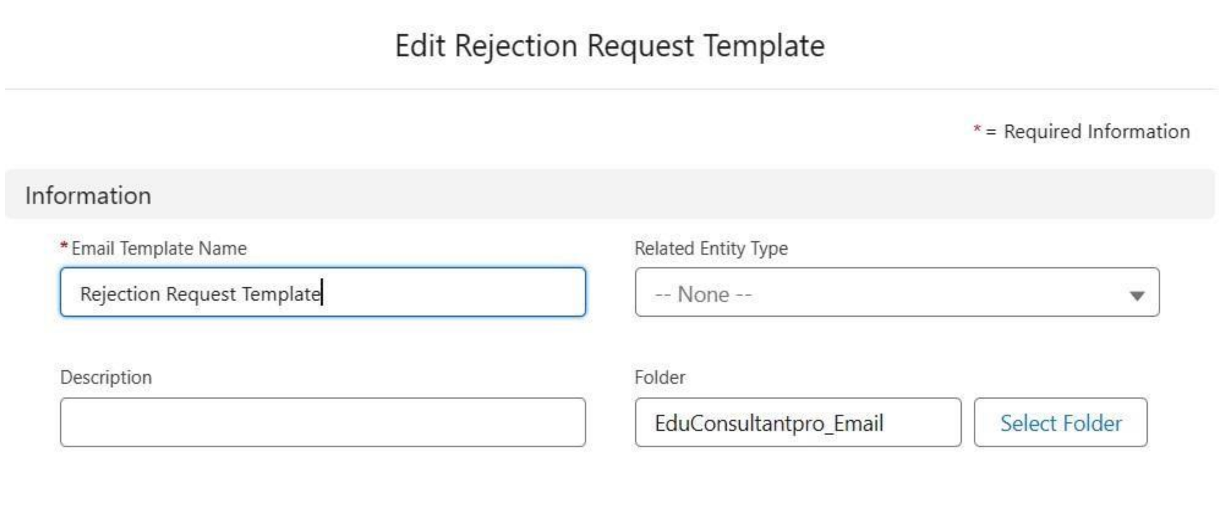
If for any reason you need to reschedule or cancel our appointment, please notify me at your earliest convenience so that we can make alternative arrangements.

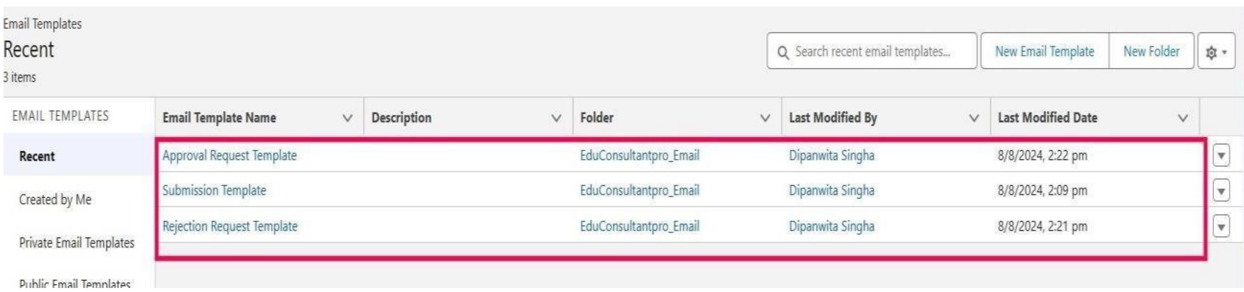
Once again, thank you for choosing to work with me on this matter. I am confident that our collaboration will

Cancel | Save

4. Create two additional email templates:
   - **Approval Template**: Similar to the Submission Template but tailored for approval notifications.
   - **Rejection Template**: Similar to the Submission Template but tailored for rejection notifications.



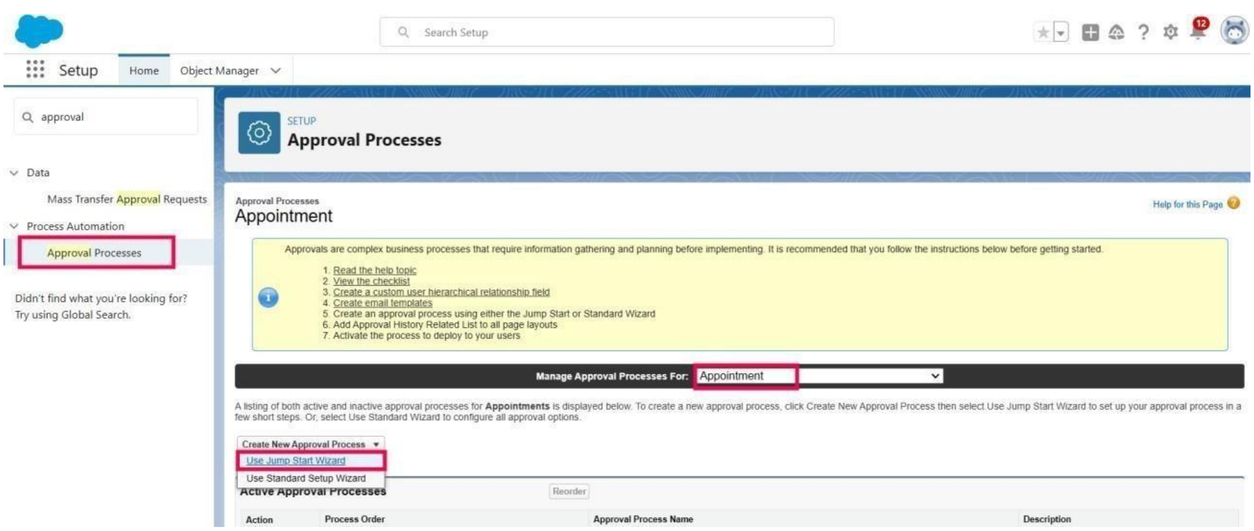

Edit Rejection Request Template
* = Required Information
Information
* Email Template Name
Rejection Request Template
Related Entity Type
-- None --
Description
Folder
EduConsultantpro_Email
Select Folder



Subtask 2: Create An Approval Process

Configure an approval process for the Appointment object to manage request approvals.

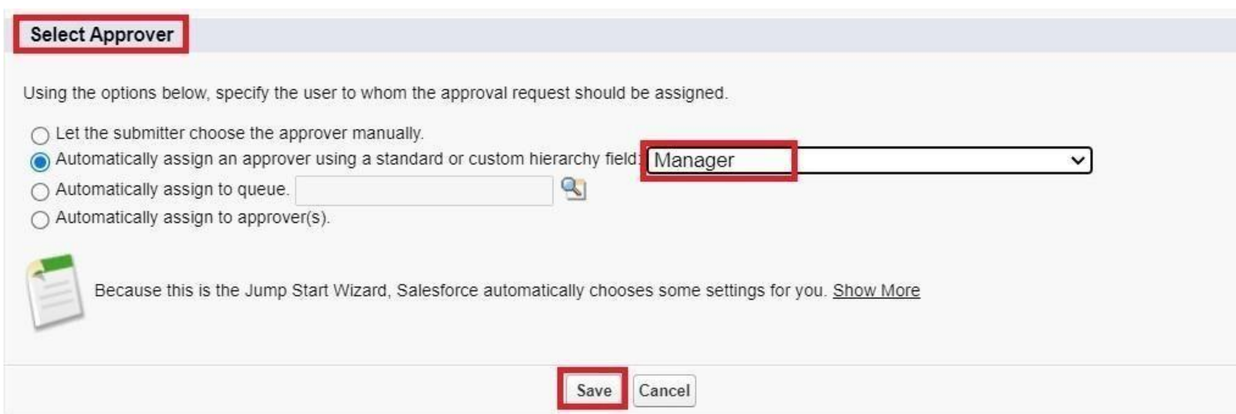
1. Navigate to **Setup**, enter **Approval** in the Quick Find box, and select **Approval Processes**.
2. In **Manage Approval Processes For**, select **Appointment**.
3. Click **Create New Approval Process** and choose **Use Jump Start Wizard**.



4. Configure the approval process:

   - **Process Name:** Appointment Approval

▪ **Approver Selection:** Select **Manager** for "Automatically assign an approver using a standard or custom hierarchy field."

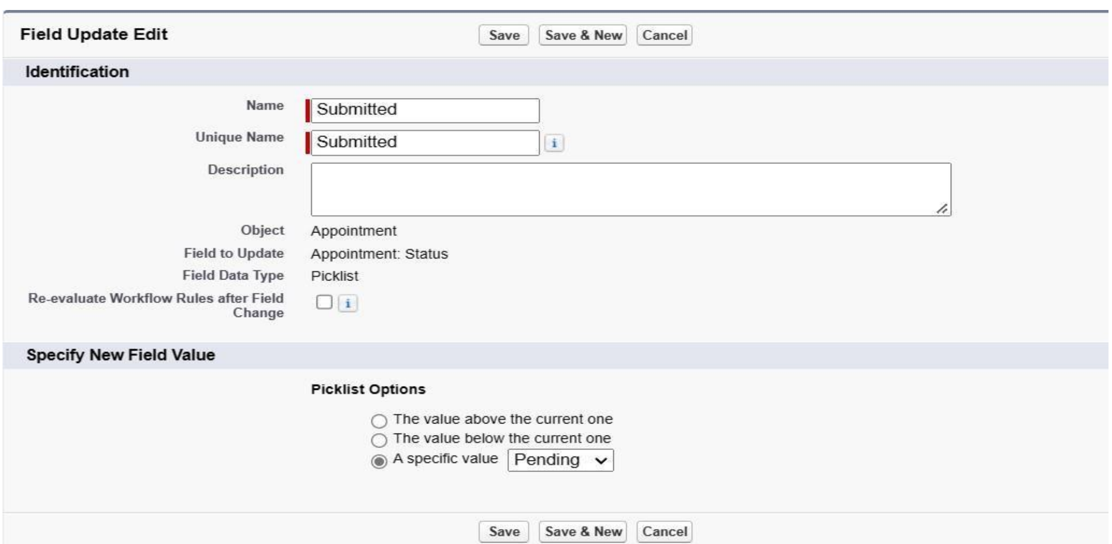


5. Click **Next** and select **Manager** for the option **Automated Approver Determined By**.
6. Under **Record Editability Properties**, select **Administrators** OR the currently assigned approver can edit records during the approval process. 7. Click **Save**.


Approval Process Edit
Appointment Approval
Step 3. Specify Approver Field and Record Editability Properties
When you define approval steps, you can assign approval requests to different users. One of your options is to use a use
approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be lock
currently assigned approver to edit the record.
Select Field Used for Automated Approval Routing
Next Automated Approver Determined By
Manager
Use Approver Field of Appointment Owner
Record Editability Properties
Administrators ONLY can edit records during the approval process.
Administrators OR the currently assigned approver can edit records during the approval process.

8. Click **View Approval Process Detail Page**.

9. Under **Initial Submission Actions**, click **Add New**: ▪ Select **Field Update**:
○ **Field to Update:** Appointment: Status ○ **Value:** Pending



Field Update Edit Save | Save & New | Cancel

Identification

Name	Submitted
Unique Name	Submitted
Description	
Object	Appointment
Field to Update	Appointment: Status
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	☐

Specify New Field Value

Picklist Options

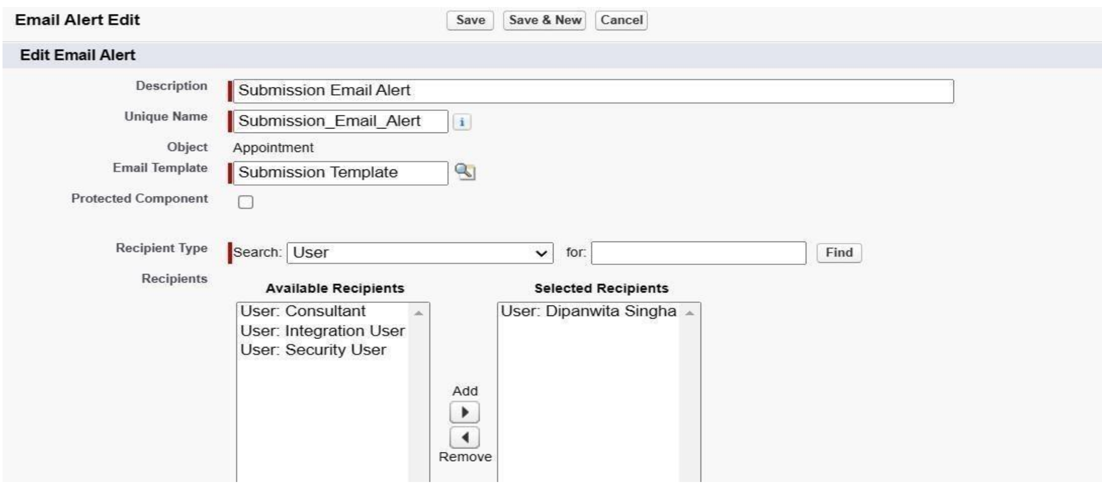
○ The value above the current one
○ The value below the current one
◉ A specific value Pending

Save | Save & New | Cancel

10. Click **Add New**:

▪ Select **Email Alert**:

○ **Description:** Submission Email Alert
○ **Email Template:** Submission Template ○
Recipient Type: Select your Name



11. Repeat steps 9 and 10 for **Final Approval** and **Final Rejection** actions using the appropriate templates and values.

Final Approval Actions

Add Existing | Add New

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit | Remove	Email Alert	Approval Email Alert
Edit | Remove	Field Update	Approved

Final Rejection Actions

Add Existing | Add New

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit | Remove	Field Update	Rejected
Edit | Remove	Email Alert	Rejection Email Alert

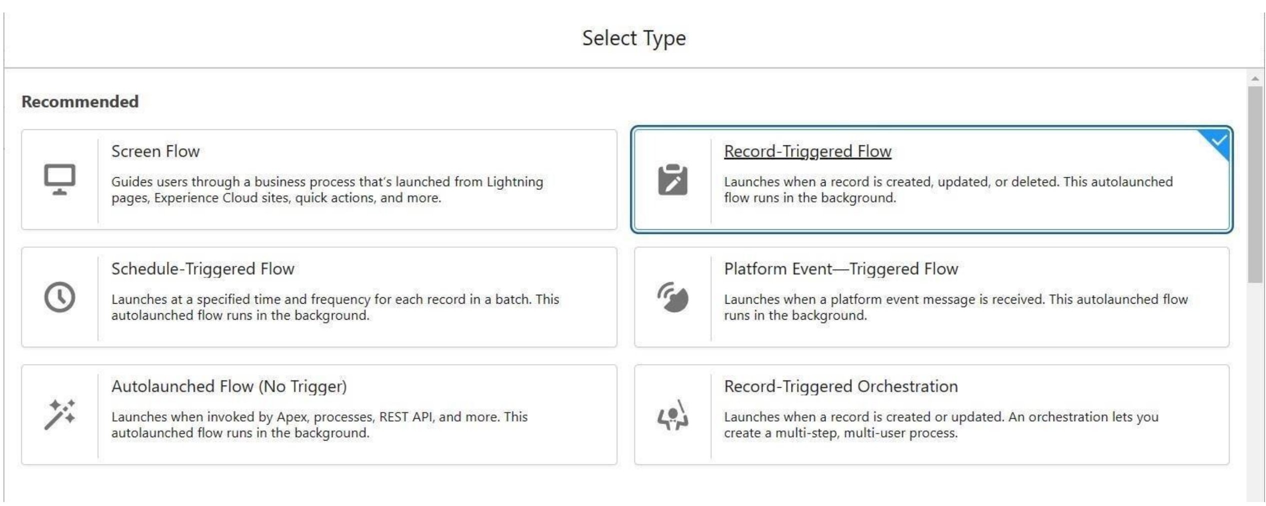
Task 7: Create A Record-Triggered Flow

Set up a Record-Triggered Flow to automate the submission of Appointment records for approval.

Subtask 1: Configure the Start Element

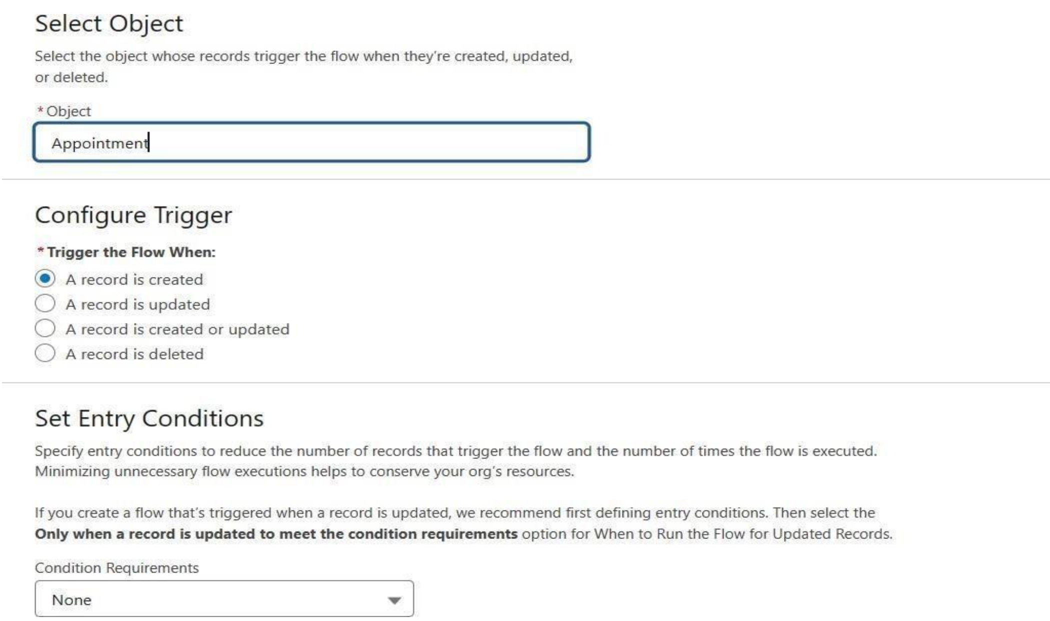
Initiate a flow that triggers upon the creation of an Appointment record.

1. From **Setup**, enter **Flows** in the Quick Find box, then select **Flows**.
2. Click **New Flow**.
3. Select **Record-Triggered Flow**.



4. Click **Create**. The **Configure Start** window opens.
5. For **Object**, select **Appointment**.

6. For **Trigger the Flow When**, select **A record is created**.

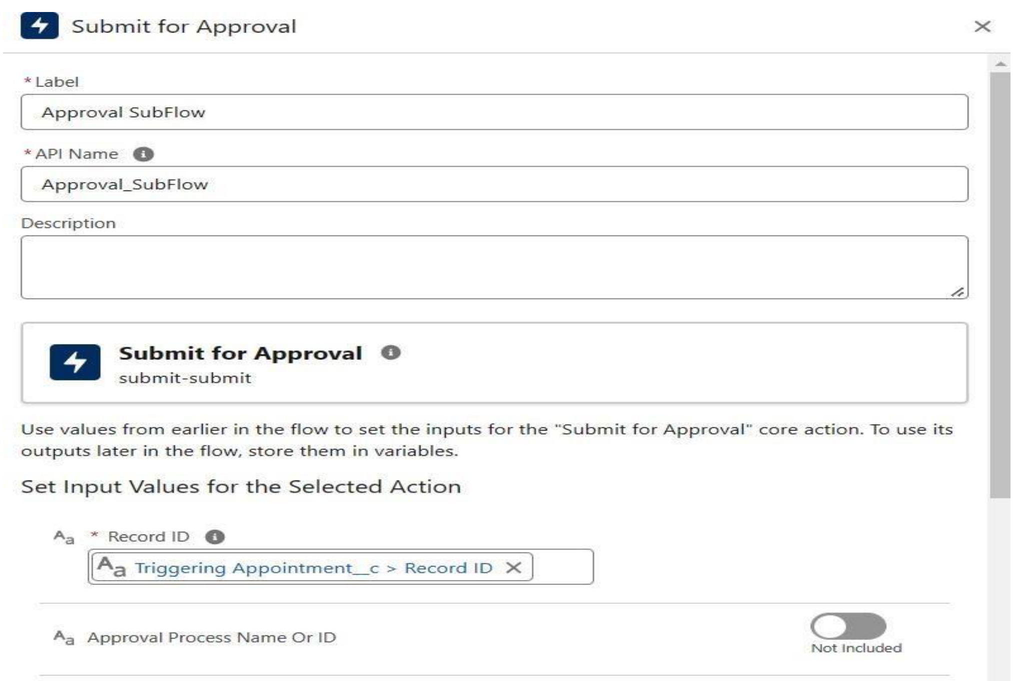


Subtask 2: Add An Action Element

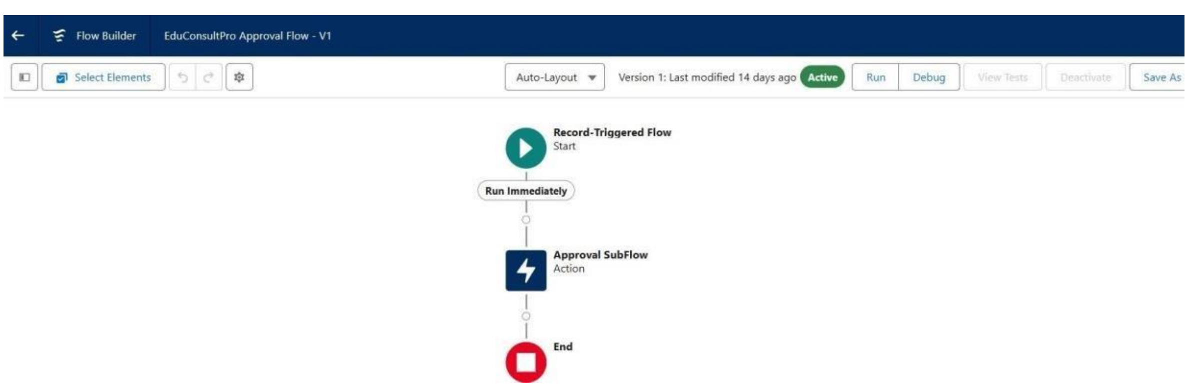
Add an Action element to submit the Appointment record for approval automatically.

1. Add an **Action** element after the **Start** element.
2. Select the **Submit for approval** action and label it as **Approval SubFlow**.
3. Set the **RecordId** to **{!$Record.Id}**.

44



4. Save the Flow, label it as **EduConsultPro Approval Flow**, and click **Activate**.

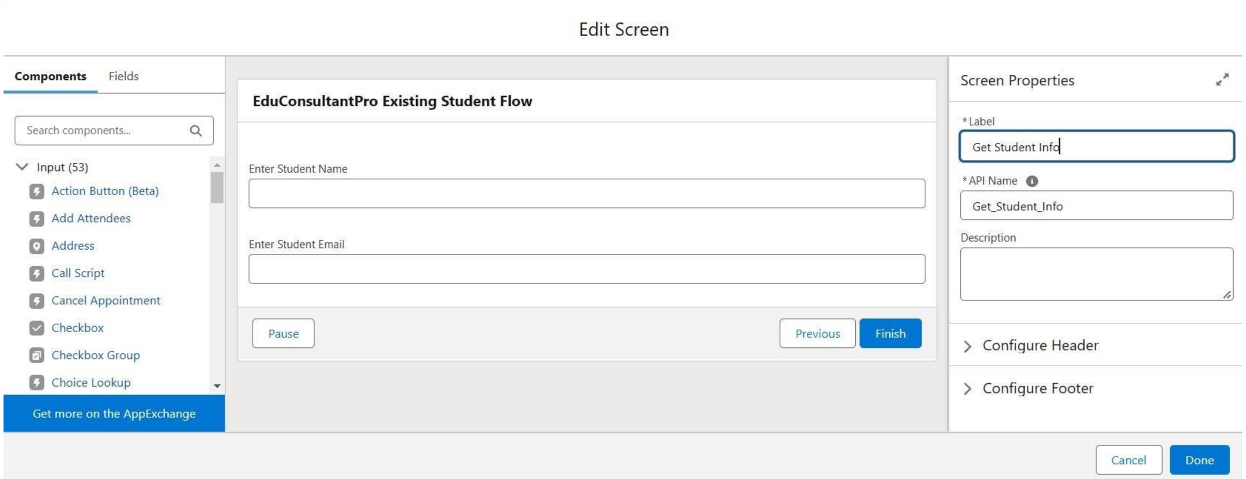


Task 8: Create A ScreenFlow For Existing Students To Book An Appointment

Subtask 1: Add Screen Element

Start the flow by gathering student information using a Screen element.

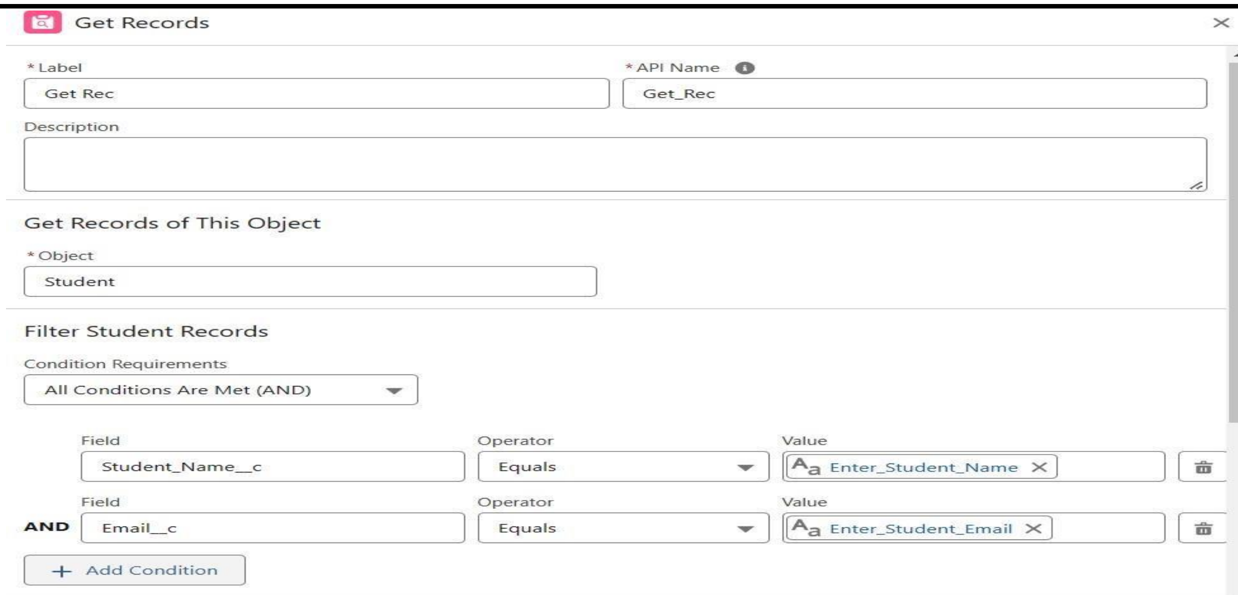
1. From **Setup**, enter **Flow Builder** in Quick Find and select **New Flow → ScreenFlow**.
2. Add a **Screen** element.
3. In the **Screen Properties** pane, for **Label**, enter **"Get Student Info"**.
4. Add two **Text** components from the left-side panel.
    - 1st Text Component Label: **Enter Student Name**
    - 2nd Text Component Label: **Enter Student Email**



5. Click **Done**.

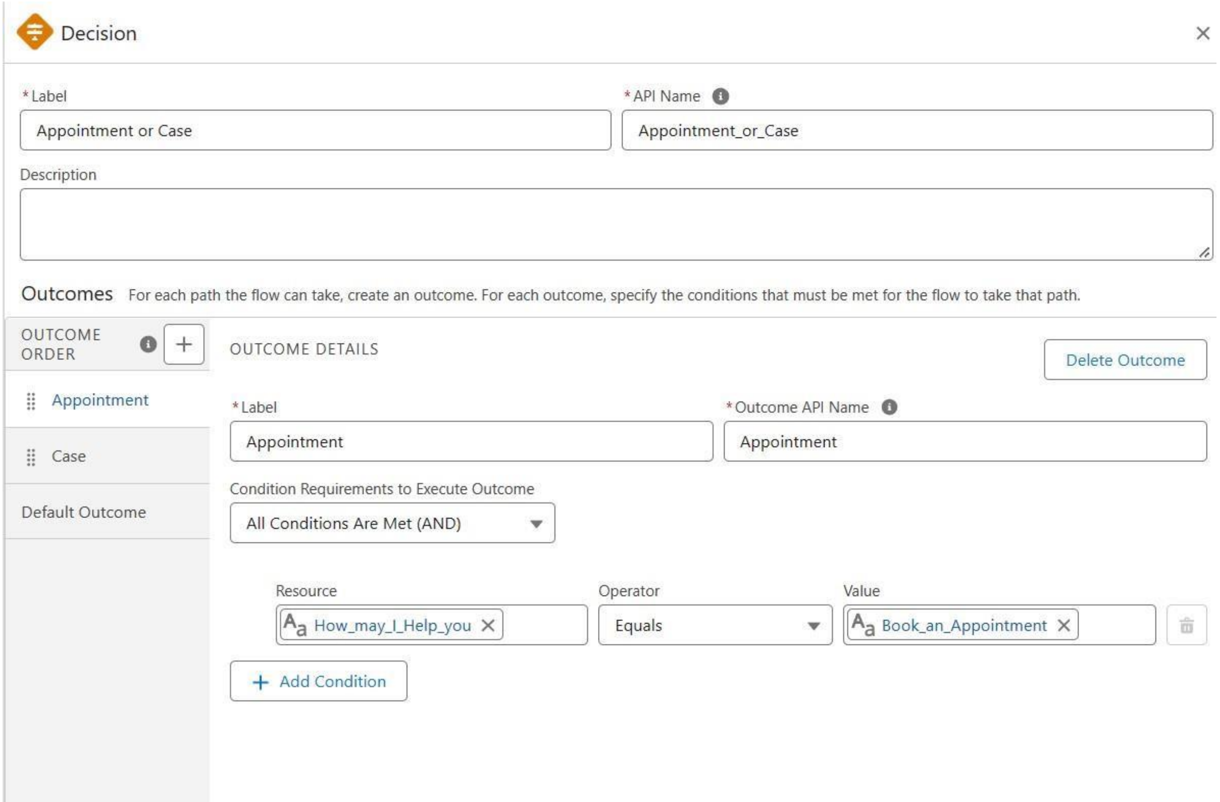
Subtask 2: Get Record

1. Add a **GET Record** element after the Screen element, label it as **“Get Rec”**.
2. Configure the GET Record element:
   - **Select Object:** Student
   - **Condition Requirement:** All Conditions are Met (AND)
   - **Field:** Student Name
     - **Operator:** Equals
     - **Value:** {!Enter_Student_Name}
   - **Field:** Email_c
     - **Operator:** Equals
     - **Value:** {!Enter_Student_Email}


Get Records
* 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
Student_Name__c
Operator
Equals
Value
Enter_Student_Name
AND
Field
Email__c
Operator
Equals
Value
Enter_Student_Email
Add Condition

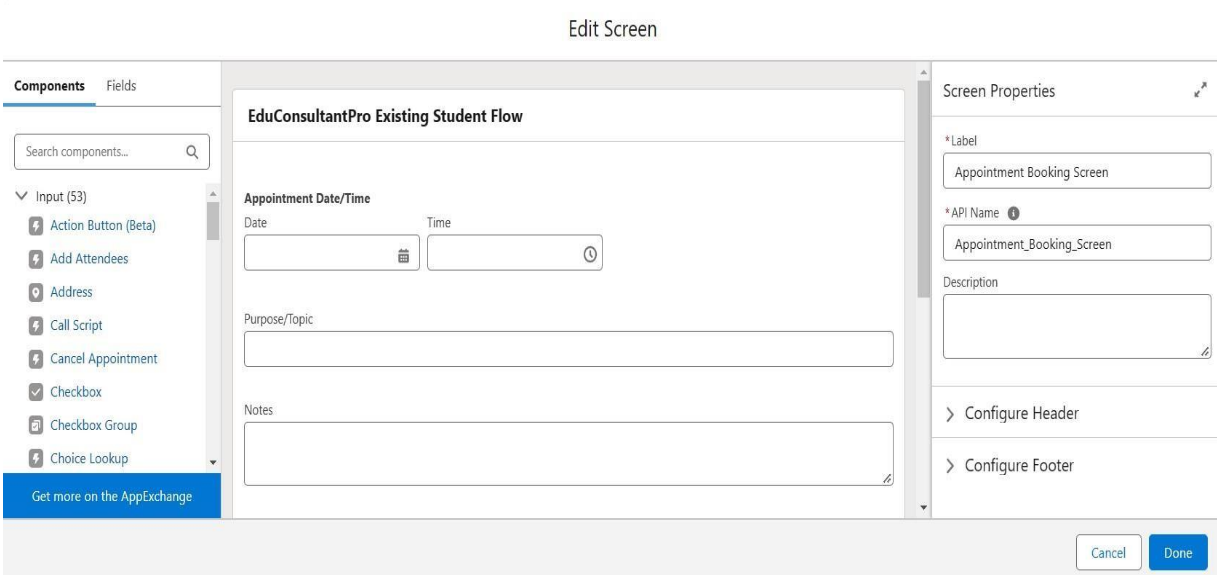
Subtask 3: Add a Decision Element

1. Add a **Decision** element after the GET Record element, label it as **“Appointment or Case”**.
2. Configure the Decision element:
    - **Outcome Label:** Appointment
        - **Resource:** {!How_may_I_Help_you}
        - **Operator:** Equals
        - **Value:** {!Book_an_Appointment}
    - Click on the “+” icon to add paths for other options such as Case, Default.


Decision
*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
Appointment
Case
Default Outcome
OUTCOME DETAILS
Delete Outcome
*Label
Appointment
*Outcome API Name
Appointment
Condition Requirements to Execute Outcome
All Conditions Are Met (AND)
Resource
How_may_I_Help_you
Operator
Equals
Value
Book_an_Appointment
Add Condition

Subtask 4: Add Screen Element

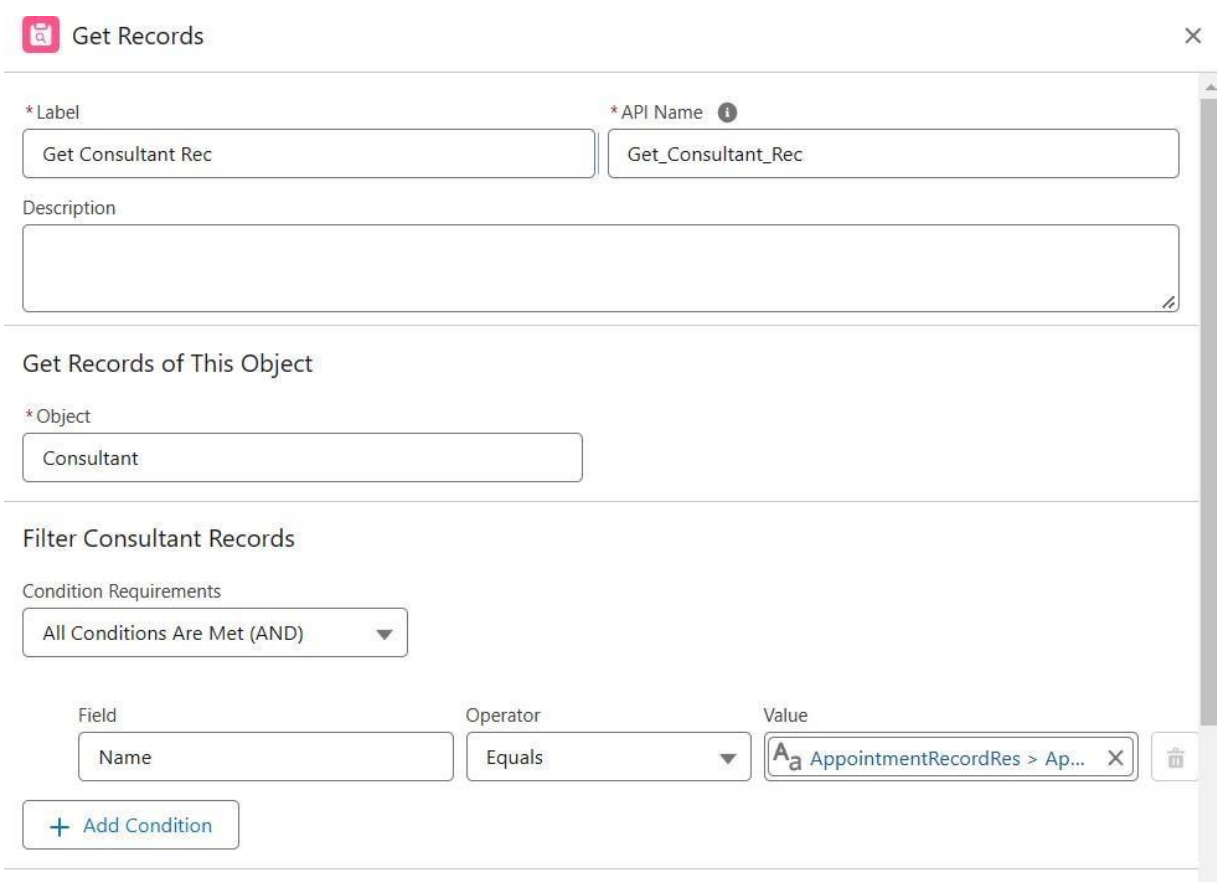
1. Add a **Screen** element after the Decision element, on the Appointment path, and label it as **“Appointment Booking Screen”**.
2. Click on **Fields**, then **Record Variable Input**, and create a new Resource (AppointmentRecordRes) to display all the fields in the Appointment object.
3. Drag the necessary fields onto the screen to collect student information. 4. Click **Done**.



Subtask 5: Add GET Record Element

1. Add a **GET Record** element after the Decision element, under the Appointment path, and label it as **“Get Consultant Rec”**.
2. Configure the GET Record element:
   - **Select Object:** Consultant
   - **Condition Requirement:** All Conditions are Met (AND)

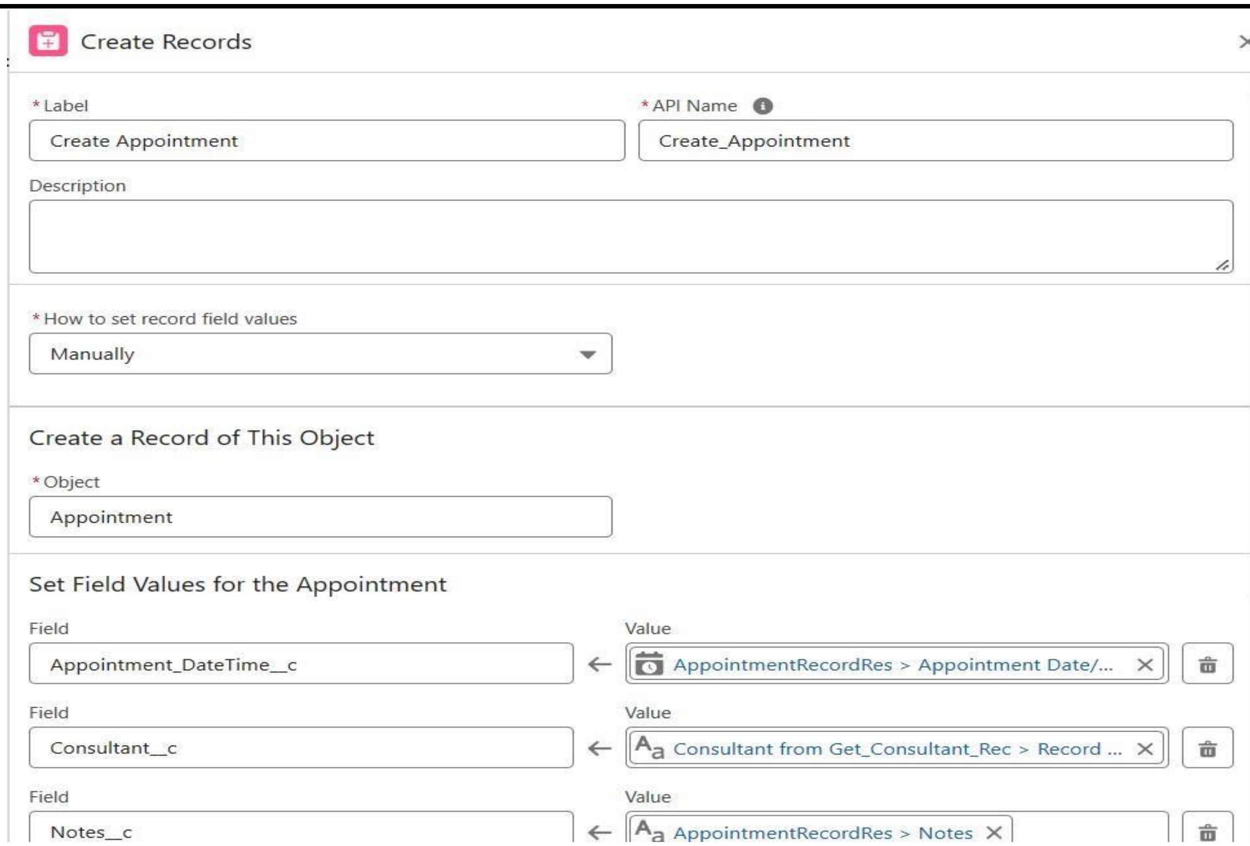
- **Field:** Name
  - **Operator:** Equals
  - **Value:** {!AppointmentRecordRes.Consultant_Name_c}



Subtask 6: Create Appointment Record Using Create Records Element

1. Add a **Create** element after the GET Consultant Rec element and label it as **“Create Appointment”**.

2. Configure the Create element: ▪ **Select Object:** Appointment ▪ **Field Values:**
   - **Appointment_DateTime_c:** {!AppointmentRecordRes.Appointment_DateTime_c}
   - **Consultant_c:** {!Get_Consultant_Rec.Id}
   - **Notes_c:** {!AppointmentRecordRes.Notes_c}
   - **PurposeTopic_c:** {!AppointmentRecordRes.PurposeTopic_c}
   - **Student_Name_c:** {!Get_Rec.Id}

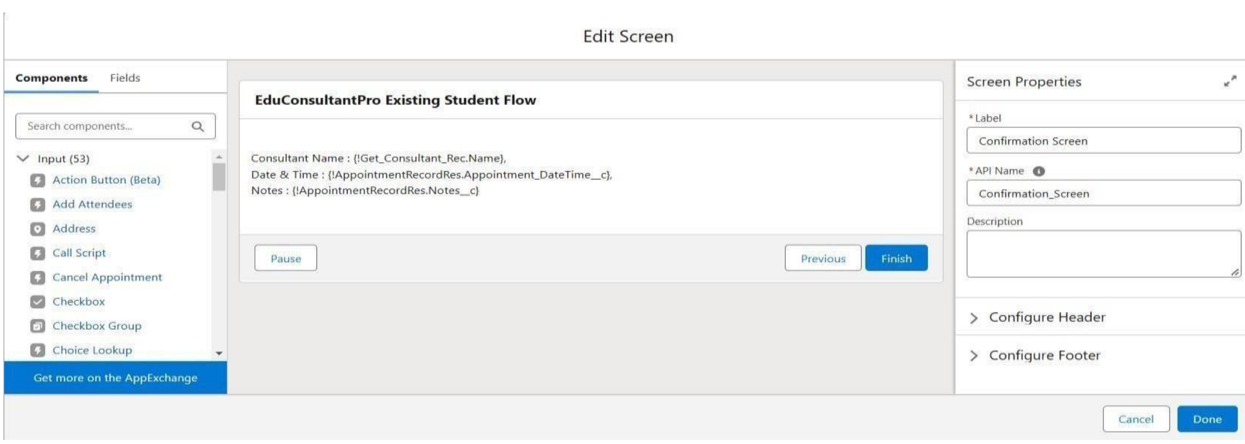

Create Records
*Label
Create Appointment
*API Name
Create_Appointment
Description
*How to set record field values
Manually
Create a Record of This Object
*Object
Appointment
Set Field Values for the Appointment
Field
Appointment_DateTime__c
Value
AppointmentRecordRes > Appointment Date/...
Field
Consultant__c
Value
Consultant from Get_Consultant_Rec > Record ...
Field
Notes__c
Value
AppointmentRecordRes > Notes

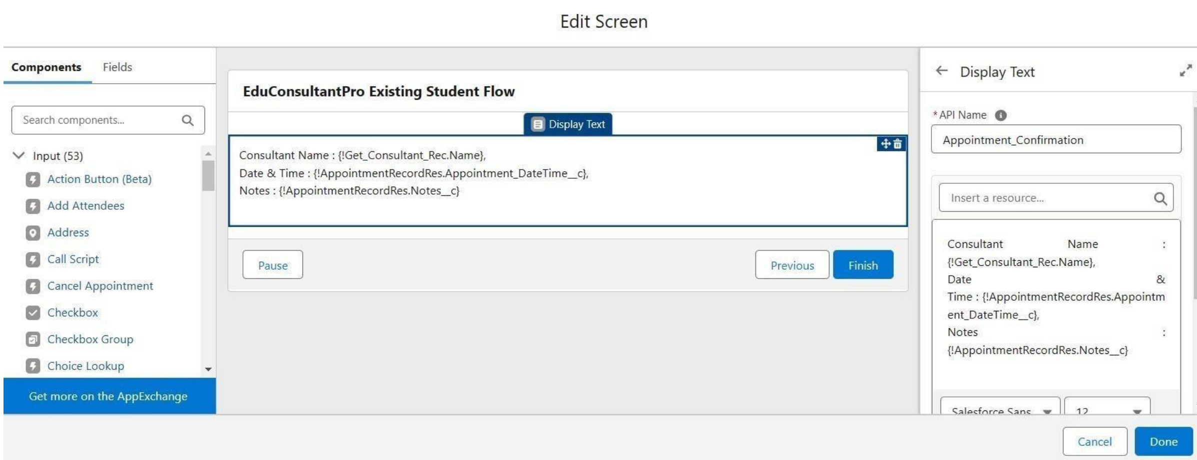
Subtask 7: Add Screen Element

1. Add a **Screen** element after the Create Appointment element, and label it as **“Confirmation Screen”**.
2. From the left side panel, search for the **Display Text** component and drag it to the main panel, label it as **“Appointment_Confirmation”**.
3. Paste the following text in the Resource picker box: Consultant Name : {!Get_Consultant_Rec.Name},

   Date & Time : {!AppointmentRecordRes.Appointment_DateTime_c}, Notes : {!AppointmentRecordRes.Notes_c} 4.

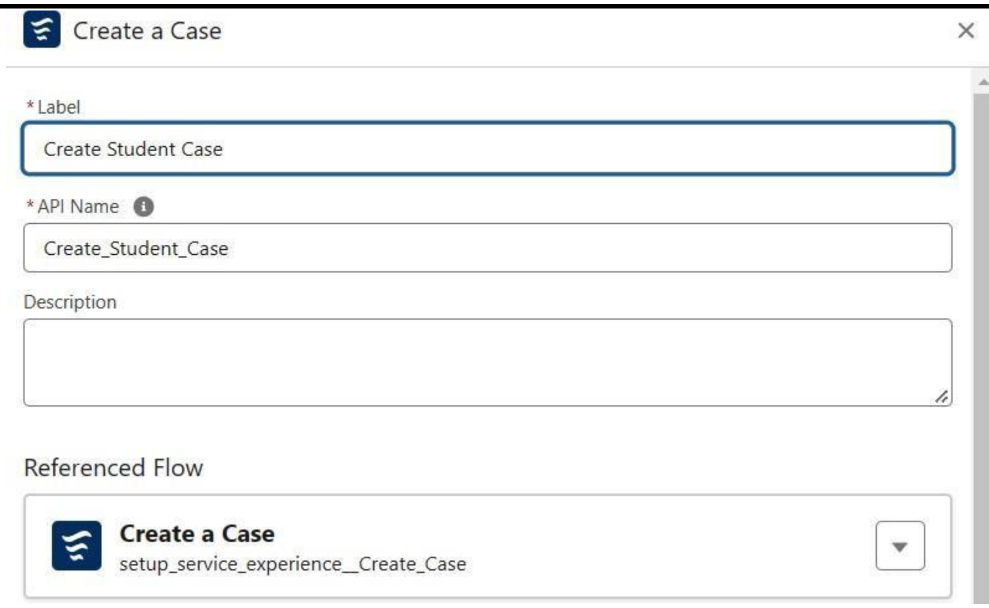
Click Done.



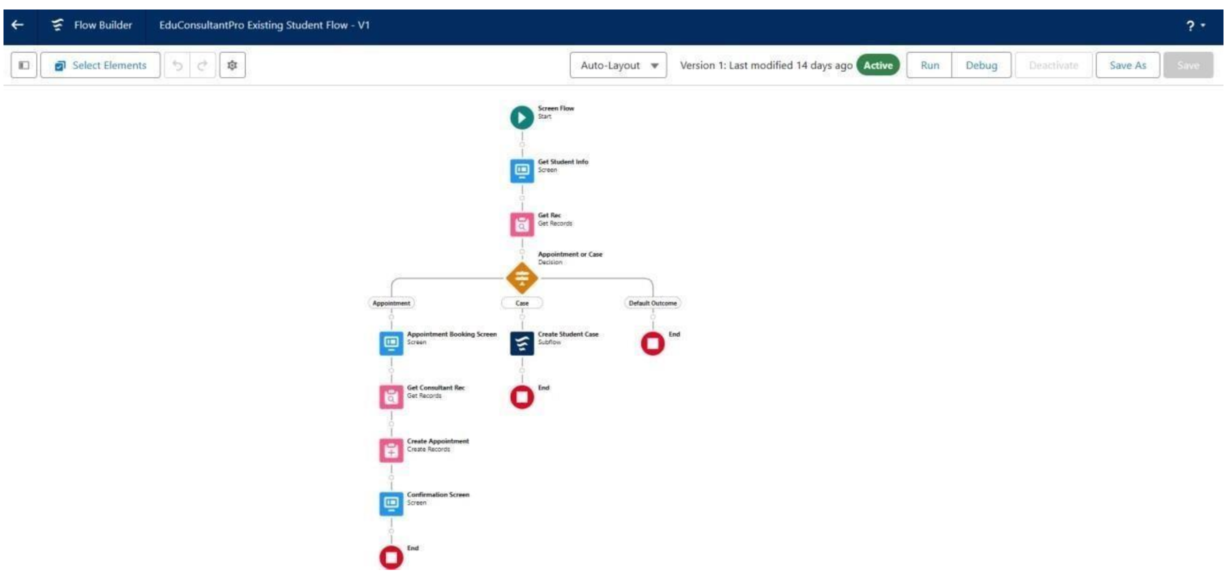


Subtask 8: Add a Subflow Element

1. Add a **Subflow** element after the Decision element, on the Case path, and search and select **"Create a Case"**, label it as **"Create Student Case"**.
2. Configure the Subflow element as needed.


Create a Case
*Label
Create Student Case
*API Name
Create_Student_Case
Description
Referenced Flow
Create a Case
setup_service_experience__Create_Case

3. Save the flow, label it as **“EduConsultantPro Existing Student Flow”**, and activate it.



Task 9: Create A ScreenFlow to Combine All The Flows At One Place

This task involves creating a central ScreenFlow that integrates various existing flows, allowing users to choose and access different functionalities from a single interface.

Subtask 1: Add Welcome Screen Element

1. From Setup, enter **Flow Builder** in the Quick Find box, select **New Flow → Screen Flow**.
2. Add a **Screen** element and label it as **“Welcome Screen”**.

3. From the left side panel, drag the **Display Text** component to the main panel.
4. Label the Display Text component as **"SuccessMessage"**.
5. Paste the following text into the Resource picker box:

"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.

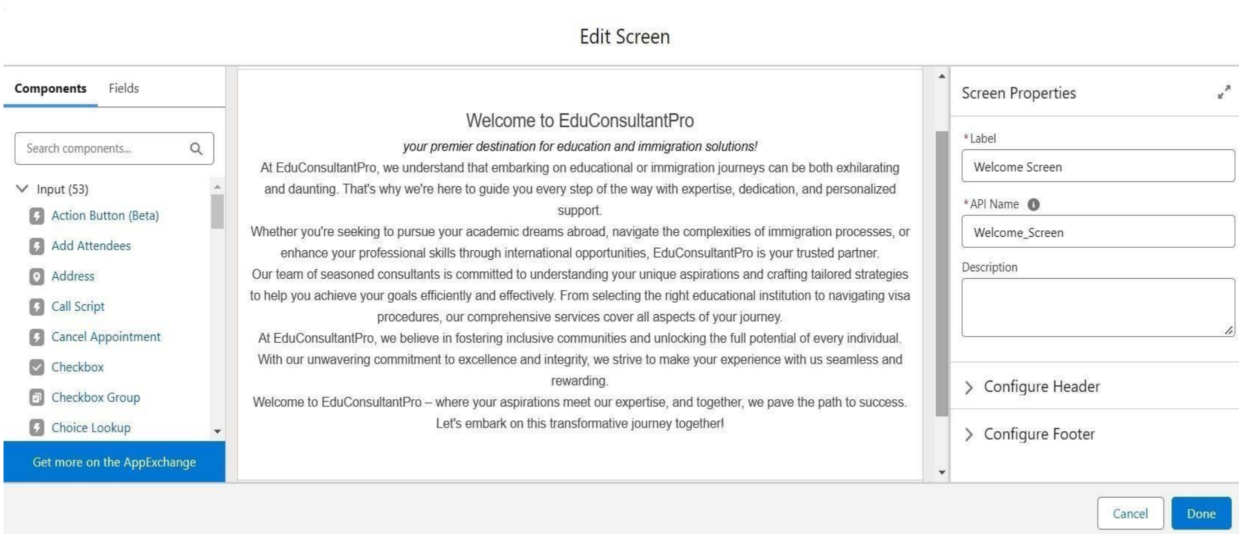
Whether you're seeking to pursue your academic dreams abroad, navigate the complexities of immigration processes, or enhance your professional skills through international opportunities, EduConsultantPro is your trusted partner.

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 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!"

6. Click **Done**.

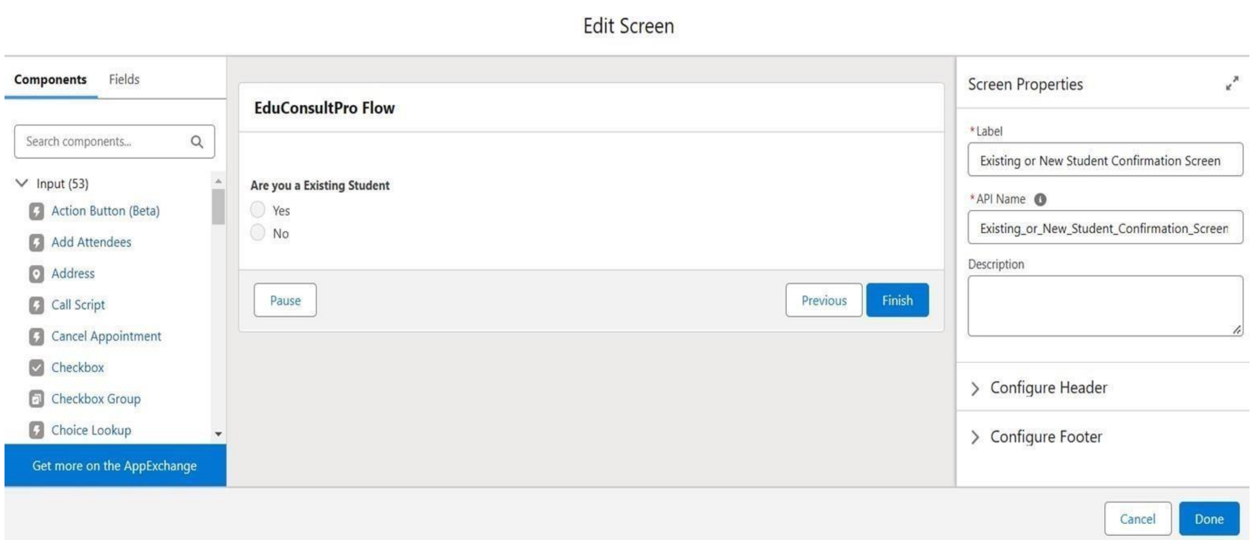


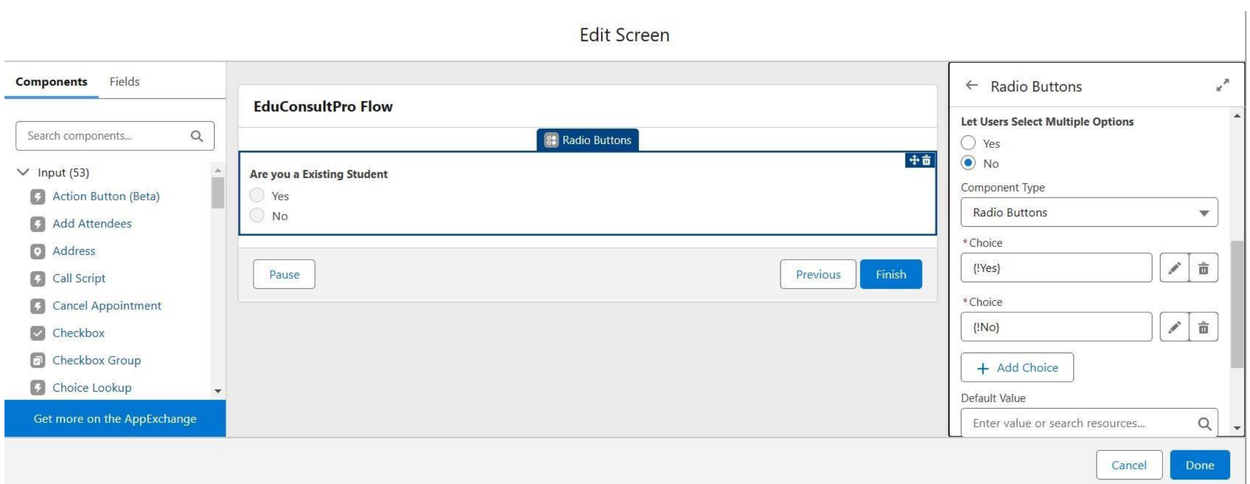
Subtask 2: Add Existing or New Student Confirmation Screen

1. Add a **Screen** element after the Welcome Screen element and label it as **"Existing or New Student Confirmation Screen"**.

2. Add a **Radio Button** component from the left side panel.
   - **Label:** Are you an Existing Student?
   - **Choice 1:** "Yes"
   - **Choice 2:** "No"

3. Click **Done**.

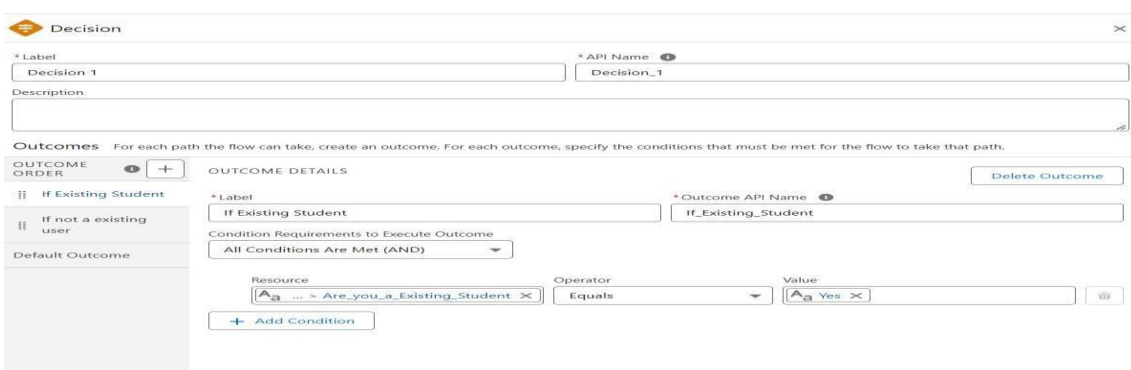

Edit Screen
Components
Fields
Search components...
Input (53)
Action Button (Beta)
Add Attendees
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Choice Lookup
Get more on the AppExchange
EduConsultPro Flow
Are you a Existing Student
Yes
No
Pause
Previous
Finish
Screen Properties
*Label
Existing or New Student Confirmation Screen
*API Name
Existing_or_New_Student_Confirmation_Screen
Description
Configure Header
Configure Footer
Cancel
Done

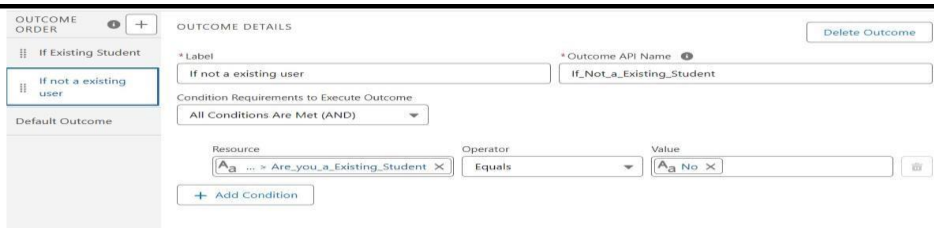

Edit Screen
Components
Fields
Search components...
Input (53)
Action Button (Beta)
Add Attendees
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group
Choice Lookup
Get more on the AppExchange
EduConsultPro Flow
Radio Buttons
Are you a Existing Student
Yes
No
Pause
Previous
Finish
Radio Buttons
Let Users Select Multiple Options
Yes
No
Component Type
Radio Buttons
*Choice
{!Yes}
*Choice
{!No}
Add Choice
Default Value
Enter value or search resources...
Cancel
Done

Subtask 3: Add Decision Element

1. Add a **Decision** element after the Existing or New Student Confirmation Screen element and label it as **“Decision 1”**.
2. Create an outcome:
    - **Label:** If Existing Student

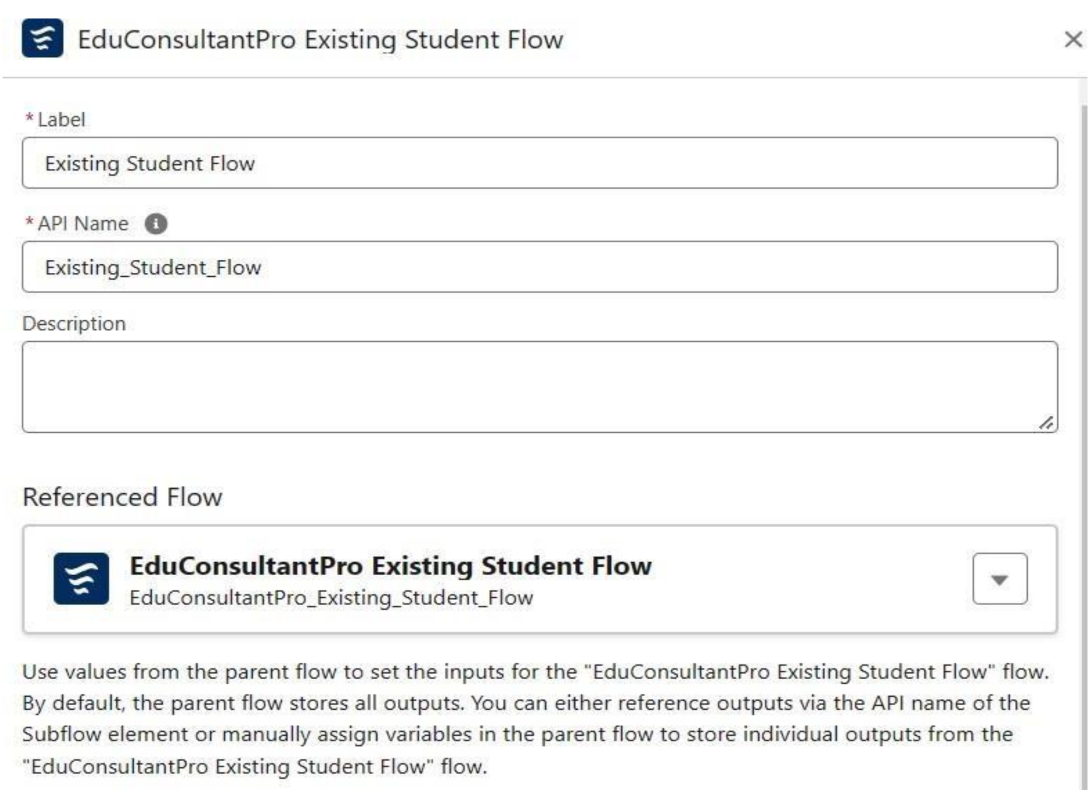
    - **Resource:** {!Are_you_a_Existing_Student}
    - **Operator:** Equals
    - **Value:** {!Yes}
3. Click the **“+”** icon to add more outcomes for “No” and other cases as required.




OUTCOME ORDER
If Existing Student
If not a existing user
Default Outcome
OUTCOME DETAILS
Delete Outcome
*Label
If not a existing user
*Outcome API Name
If_Not_a_Existing_Student
Condition Requirements to Execute Outcome
All Conditions Are Met (AND)
Resource
... > Are_you_a_Existing_Student
Operator
Equals
Value
No
Add Condition

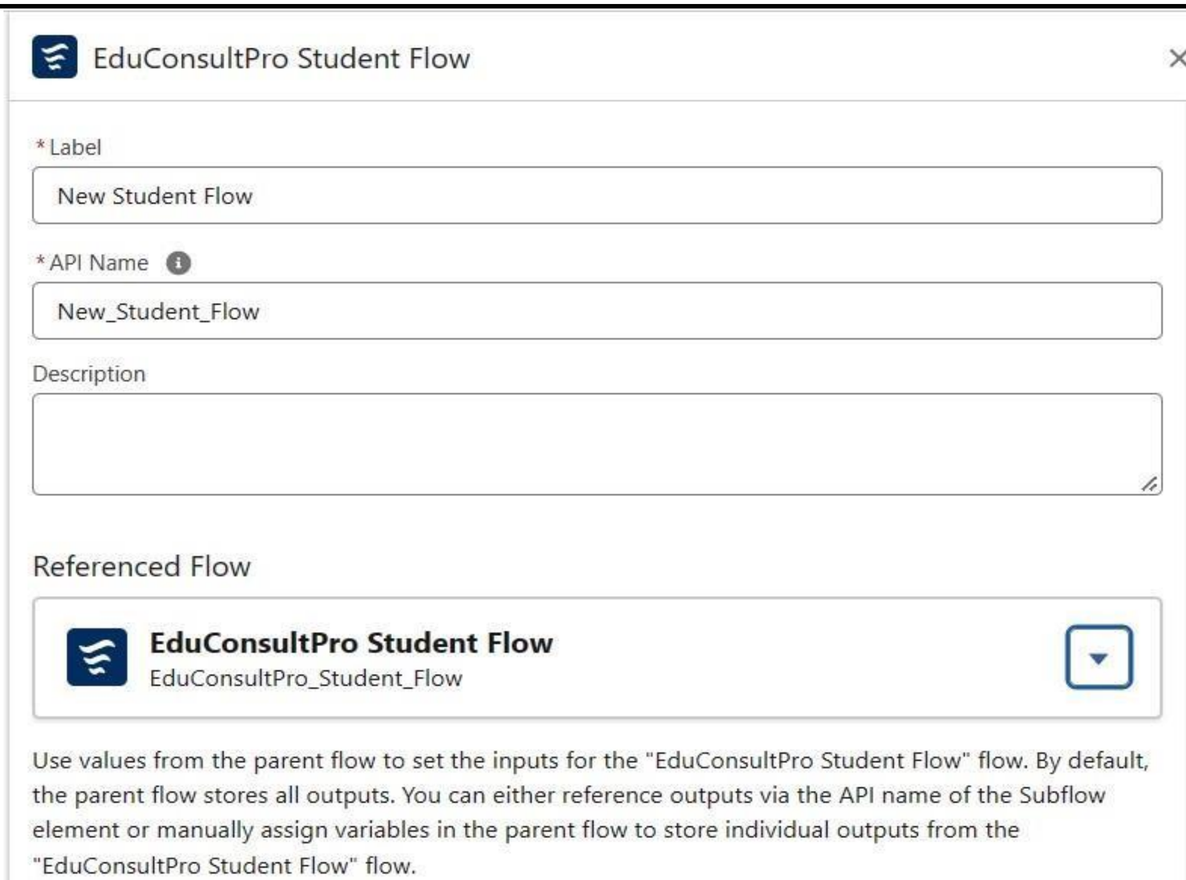
Subtask 4: Add Subflow for Existing Students

1. Add a **Subflow** element after the **Decision 1** element on the **If Existing Student** path.
2. Search for and select **"EduConsultantPro Existing Student Flow"**.
3. Label it as **"Existing Student Flow"**.
4. Click **Done**.

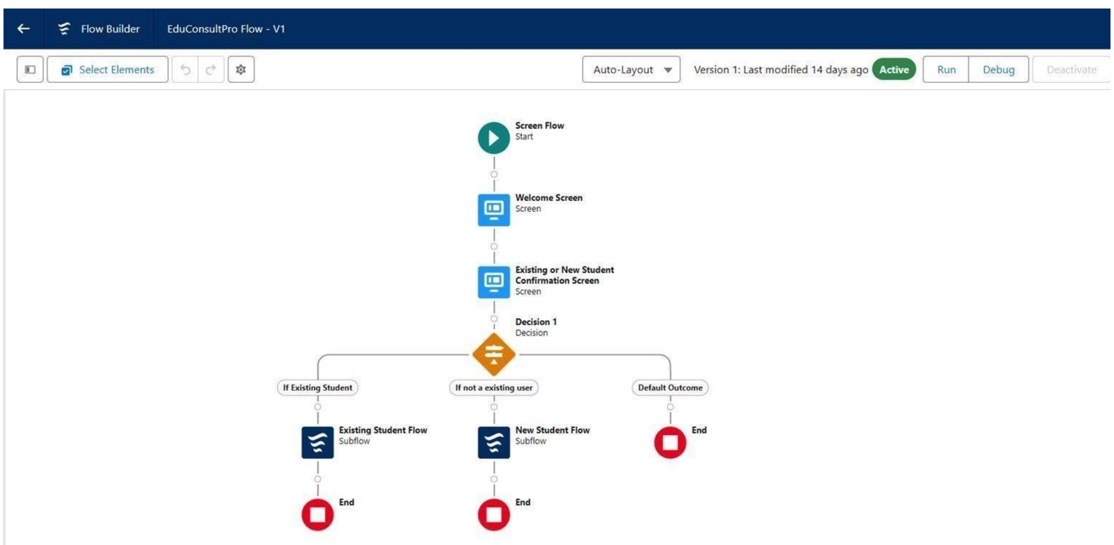


Subtask 5: Add Subflow for New Students

1. Add a **Subflow** element after the **Decision 1** element on the **If Not an Existing Student** path.
2. Search for and select **“EduConsultantPro Student Flow”**.
3. Label it as **“New Student Flow”**.
4. Click **Done**.


EduConsultPro Student Flow
*Label
New Student Flow
*API Name
New_Student_Flow
Description
Referenced Flow
EduConsultPro Student Flow
EduConsultPro_Student_Flow
Use values from the parent flow to set the inputs for the "EduConsultPro 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 "EduConsultPro Student Flow" flow.

Save the flow, label it as **“EduConsultantPro Flow”**, and activate it.



Task 10: Create A Lightning App Page

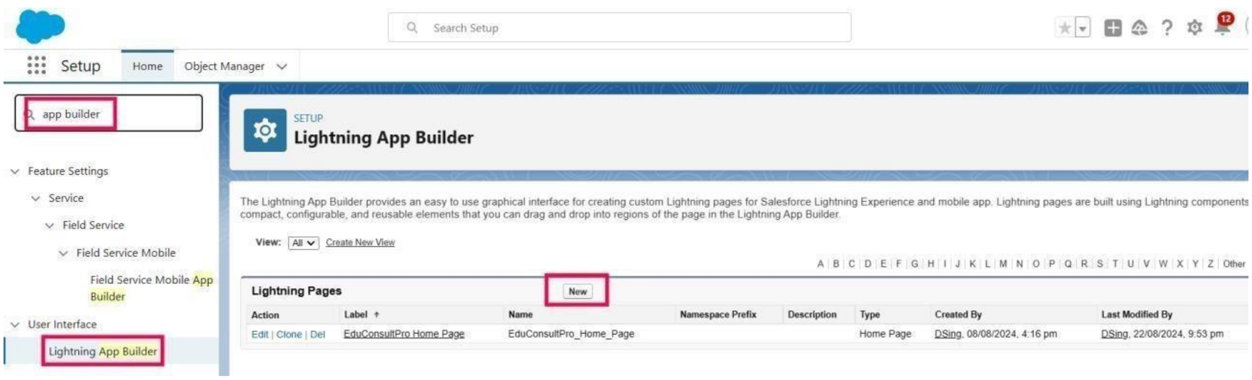
This task involves creating a Lightning App Page and making it available in the application. The new page will feature the "EduConsultantPro Flow" component.

Subtask 1: Create A Lightning App Page

1. Access Lightning App Builder:

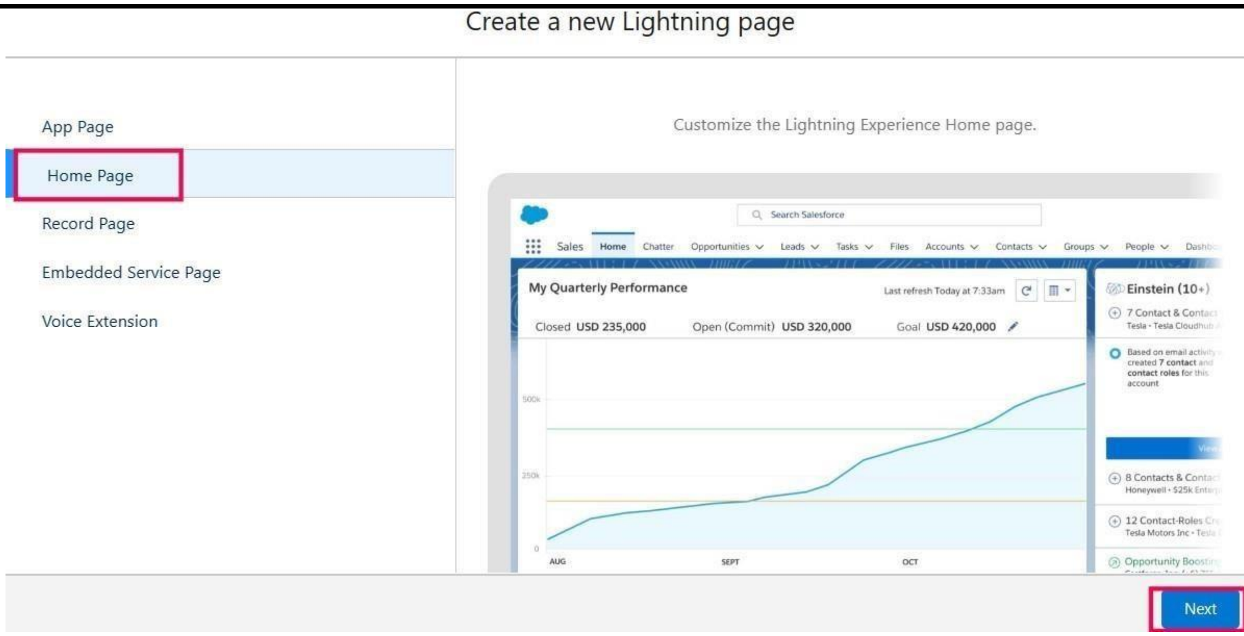
- From Setup, enter **App Builder** in the Quick Find box.

- Click **Lightning App Builder**.



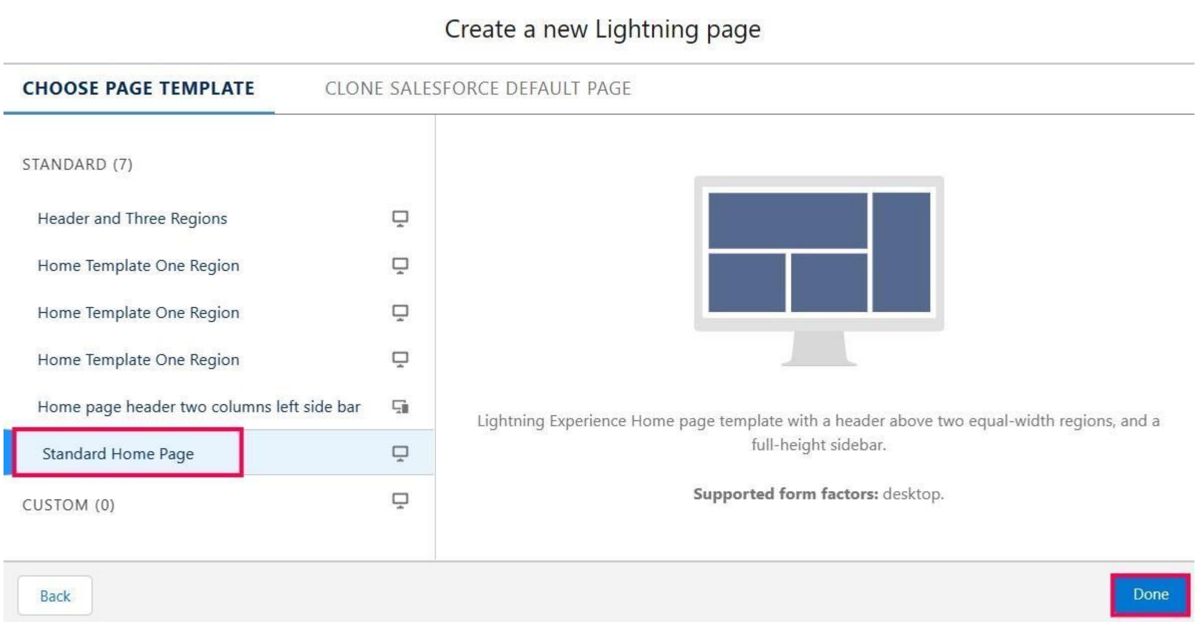
2. Create a New Home Page: ▪ Click **New**.

▪ Select **Home Page** and click **Next**.


Create a new Lightning page
App Page
Home Page
Record Page
Embedded Service Page
Voice Extension
Customize the Lightning Experience Home page.
Search Salesforce
Sales
Home
Chatter
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Groups
People
My Quarterly Performance
Last refresh Today at 7:33am
Closed USD 235,000
Open (Commit) USD 320,000
Goal USD 420,000
Einstein (10+)
AUG
SEPT
OCT
Next

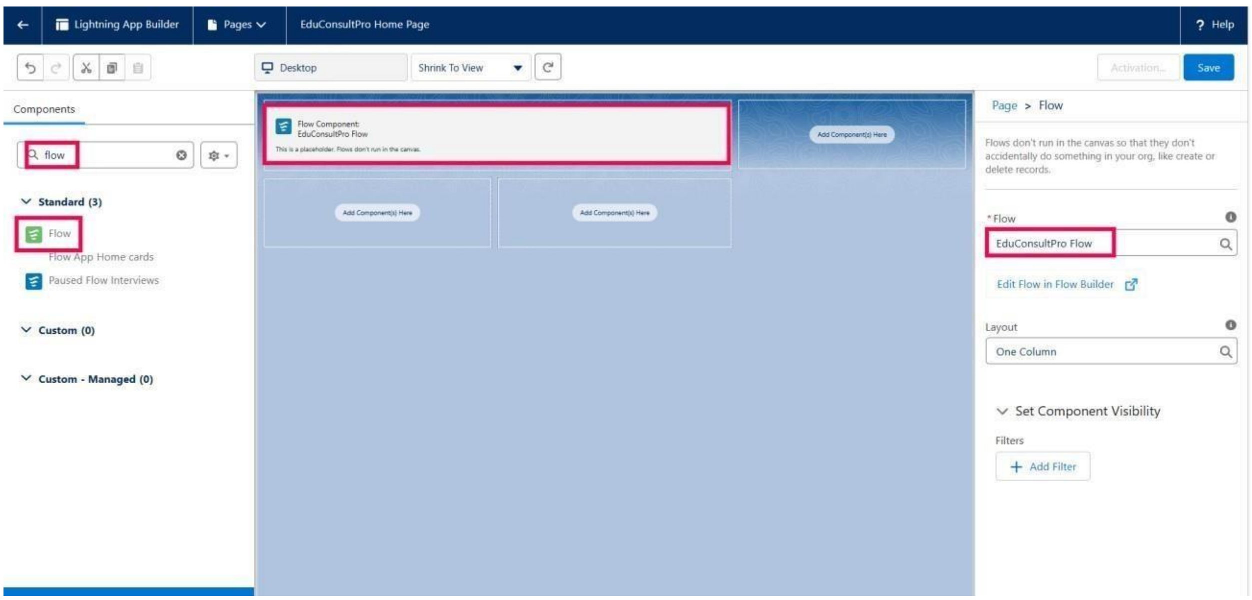
Configure the Home Page:

- **Name the Page:** Enter **“EduConsultPro Home Page”**.
- **Select a Template:** Choose the **Standard Home Page** template. ▪ Click **Done**.



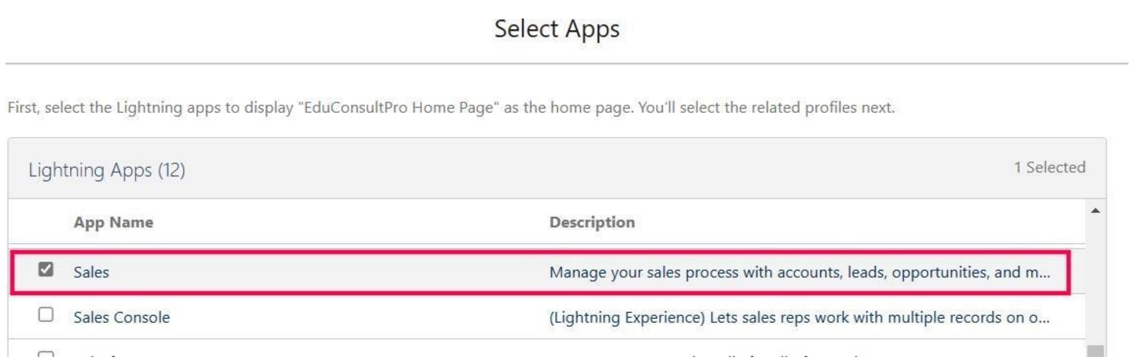
3. Add the Flow Component:

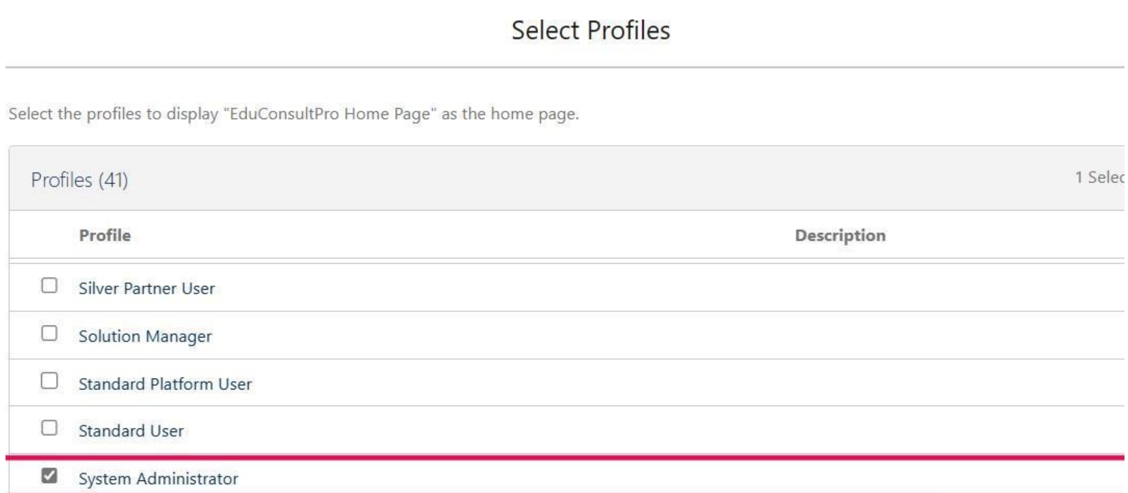
- Drag the **Flow** component to the **top-right** region of the page layout.
- In the component properties pane, search for and select **“EduConsultantPro Flow”**.

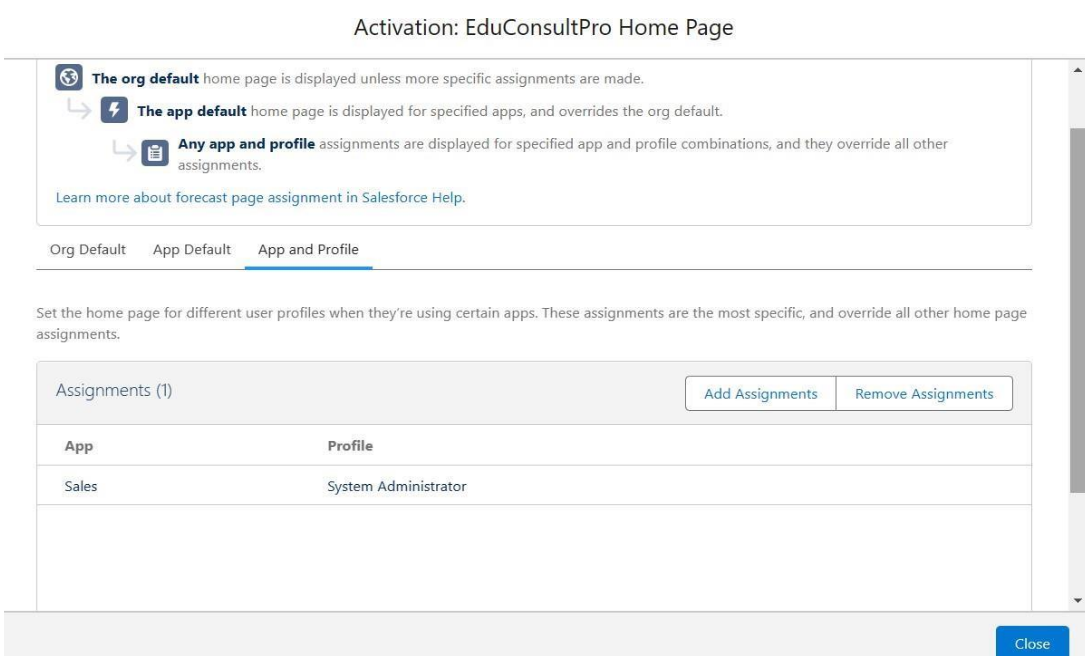


4. **Save and Activate the Page:** ▪ Click **Save**.
   - Click **Activate**.

5. **Assign the Page to Apps and Profiles:** ▪ Click **App and Profile**.
   - Click **Assign to Apps and Profiles**.
   - **Select the Sales App:** Choose **Sales** and click **Next**.
   - **Assign to Profiles:** Scroll down and select **System Administrator** profile. Click **Next**.
   - **Review and Save:** Review the assignment details and click **Save**.


Select Apps
First, select the Lightning apps to display "EduConsultPro Home Page" as the home page. You'll select the related profiles next.
Lightning Apps (12)
1 Selected
App Name
Description
Sales
Manage your sales process with accounts, leads, opportunities, and m...
Sales Console
(Lightning Experience) Lets sales reps work with multiple records on o...


Select Profiles
Select the profiles to display "EduConsultPro Home Page" as the home page.
Profiles (41)
1 Selec
Profile
Description
Silver Partner User
Solution Manager
Standard Platform User
Standard User
System Administrator


Activation: EduConsultPro Home Page
The org default home page is displayed unless more specific assignments are made.
The app default home page is displayed for specified apps, and overrides the org default.
Any app and profile assignments are displayed for specified app and profile combinations, and they override all other assignments.
Learn more about forecast page assignment in Salesforce Help.
Org Default
App Default
App and Profile
Set the home page for different user profiles when they're using certain apps. These assignments are the most specific, and override all other home page assignments.
Assignments (1)
Add Assignments
Remove Assignments
App
Profile
Sales
System Administrator
Close