

A CRM Application to Manage the Services offered by an Institution

By

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<https://www.salesforce.com/trailblazer/fctkh6g5br15fa0iv8>

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.

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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.

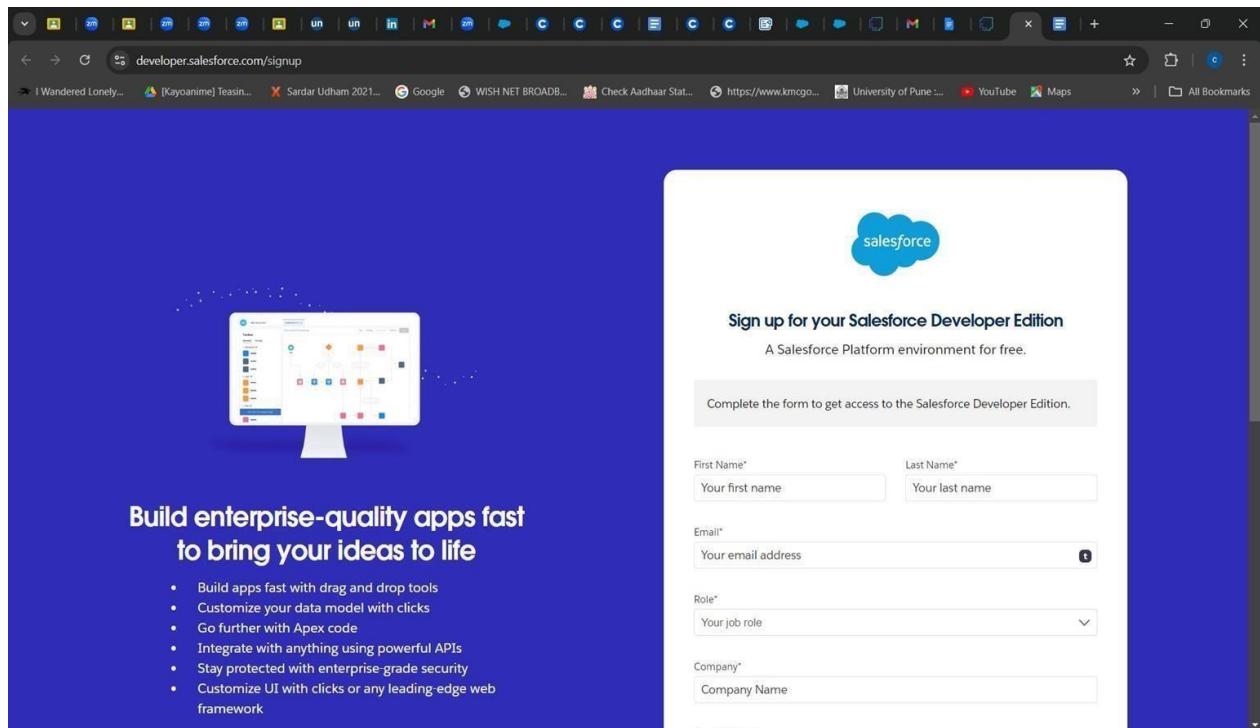
Another critical component was the implementation of an immigration case management system. Students could initiate immigration cases through various channels such as phone, email, or web. These cases were then logged into Salesforce, with immigration agents receiving immediate notifications to take 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 experience for both students and staff.

TASK

1: Creating Developer Account

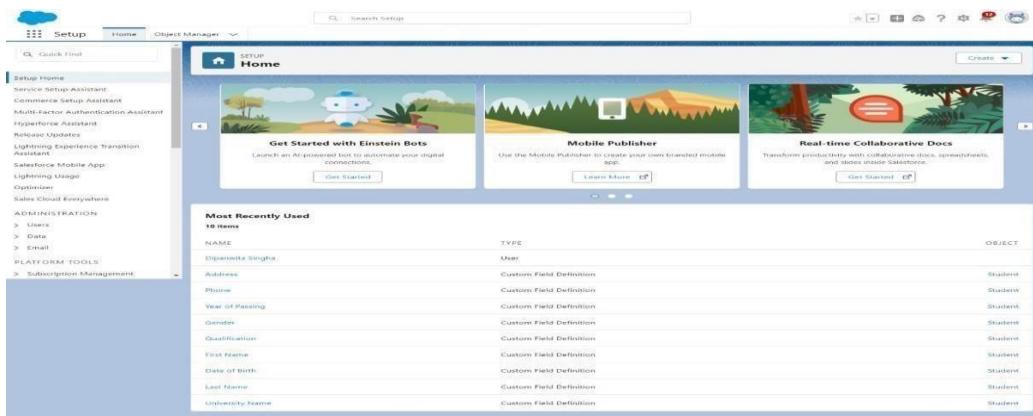
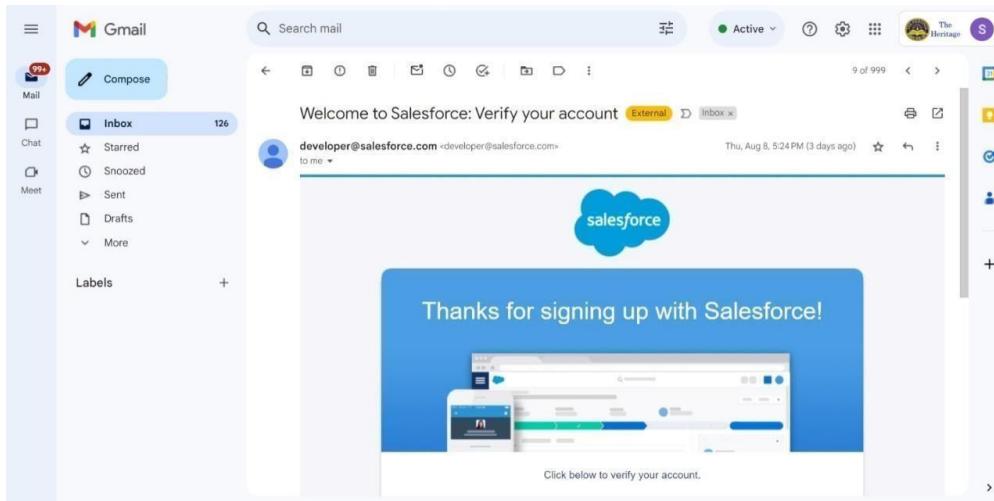
1. Go to <https://developer.salesforce.com/signup>
2. Fill up form with personal information



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.

TASK



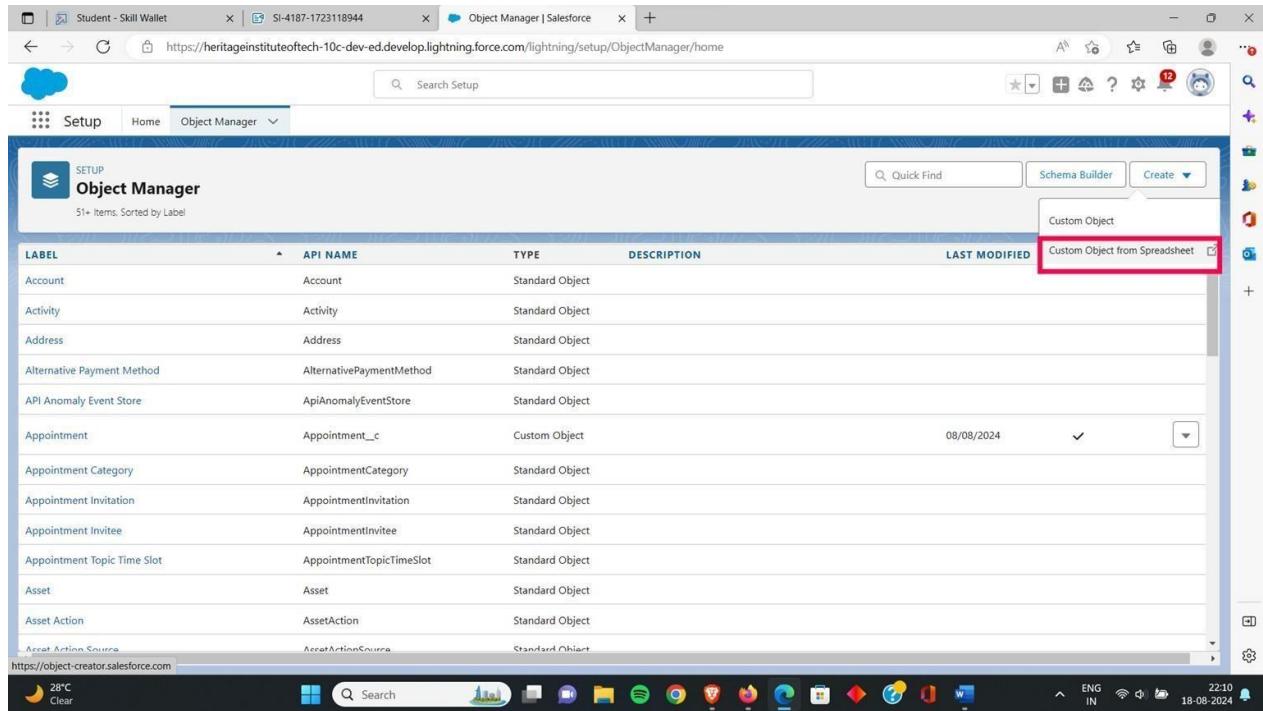
3: Create Objects from Spreadsheet

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

TASK

Subtask 1: Create Course Object

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



The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for 'SETUP', 'Home', and 'Object Manager'. Below the tabs, the title 'Object Manager' is displayed with a subtitle '51+ Items. Sorted by Label'. A search bar labeled 'Search Setup' is present. On the right side of the header, there are buttons for 'Quick Find', 'Schema Builder', and 'Create'. The 'Create' button has a dropdown menu open, showing options like 'Custom Object' and 'Custom Object from Spreadsheet', with the latter being highlighted by a red box. The main area is a table listing various objects with columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', and 'LAST MODIFIED'. The 'LAST MODIFIED' column shows the date '08/08/2024' for the 'Appointment' object. The bottom of the screen shows the Windows taskbar with icons for weather, search, file explorer, and other applications.

3. Upload the spreadsheet to Salesforce.

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

Create a custom object from a spreadsheet

Define object and fields

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

Worksheet Details

Field Label Source Enter manually Detect from row * Field Labels Row 1 Import 2 rows of Data? No, skip import Yes, import data Record Name Field Let Salesforce Create a Default

Fields 12 of 12 to import Hide mapped fields

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS	FIELD PREVIEW
✓ Address	Address	Text	<input checked="" type="checkbox"/>	Hyderabad
✓ City	City	Text	<input checked="" type="checkbox"/>	Hyderabad
✓ Phone	Phone	Phone	<input checked="" type="checkbox"/>	1234567890
✓ Qualification	Qualification	Text	<input checked="" type="checkbox"/>	M.Sc
✓ University Name	University Name	Text	<input type="checkbox"/>	BHIT
✓ Year of Passing	Year of Passing	Date	<input type="checkbox"/>	2020

Back Next

5. Define the Object properties

Create a custom object from a spreadsheet

Object properties
Almost finished! Time to define your object's attributes.

* Label
Student

* Plural Label
Student

* API Name ⓘ
Student

Object Description

> Advanced Settings

Back Finish

6. Following the same steps create the following objects:

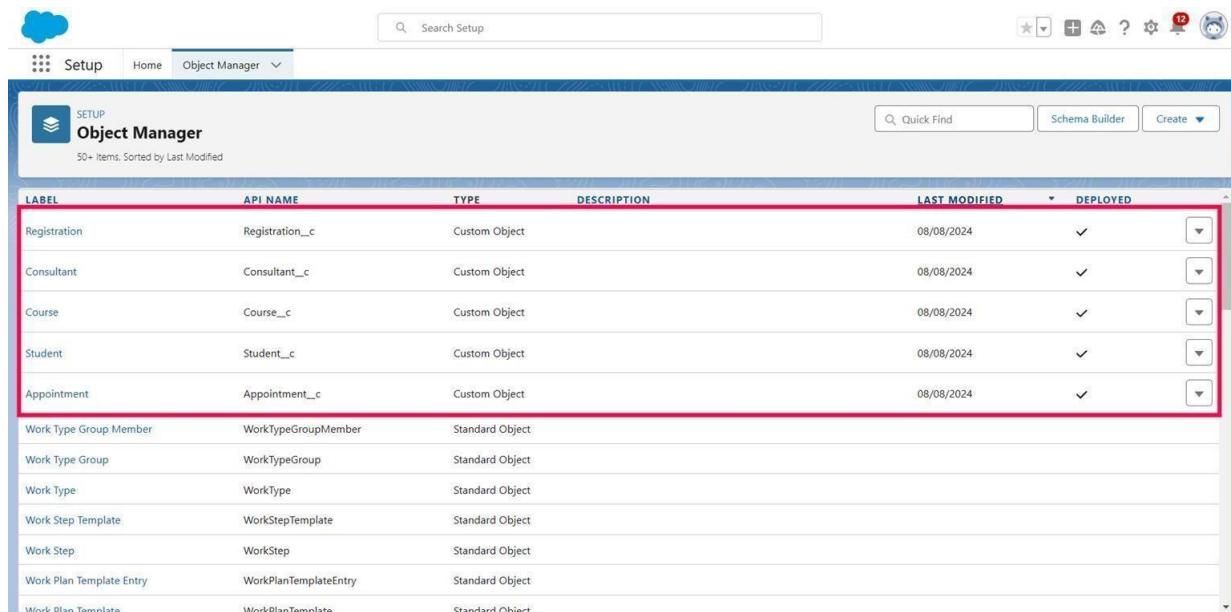
a. Consultant

b. Student

c. Appointment

d. Registration

Subtask

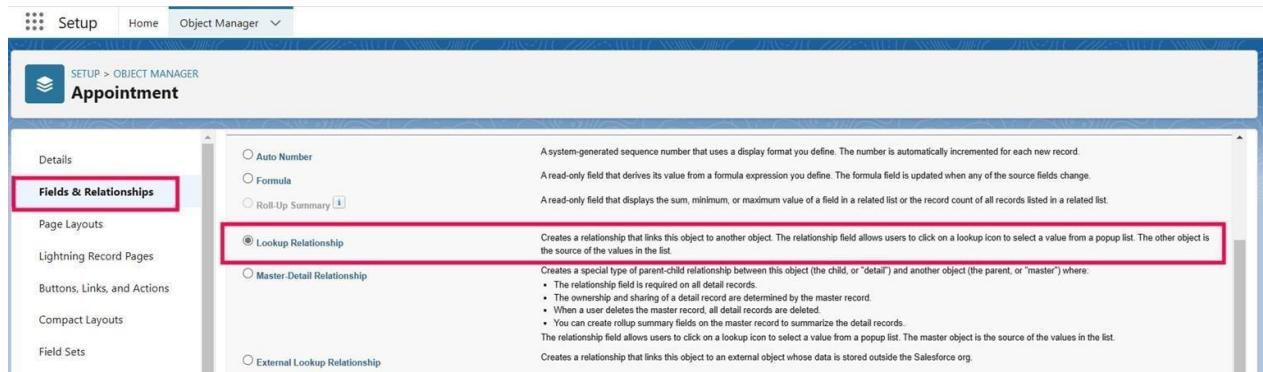


The screenshot shows the Salesforce Object Manager page. At the top, there's a search bar labeled "Search Setup:" and a toolbar with various icons. Below the toolbar, the title "Object Manager" is displayed, along with a note "50+ items. Sorted by Last Modified". On the right side of the header, there are buttons for "Quick Find", "Schema Builder", and "Create". The main area is a table with columns: "LABEL", "API NAME", "TYPE", "DESCRIPTION", "LAST MODIFIED", and "DEPLOYED". The table lists several objects, including "Registration", "Consultant", "Course", "Student", and "Appointment", all of which are custom objects. These five objects are highlighted with a red border. Other standard objects listed include "Work Type Group Member", "Work Type Group", "Work Type", "Work Step Template", "Work Step", "Work Plan Template Entry", and "Work Plan Template".

2: Create Relationships Among the Objects

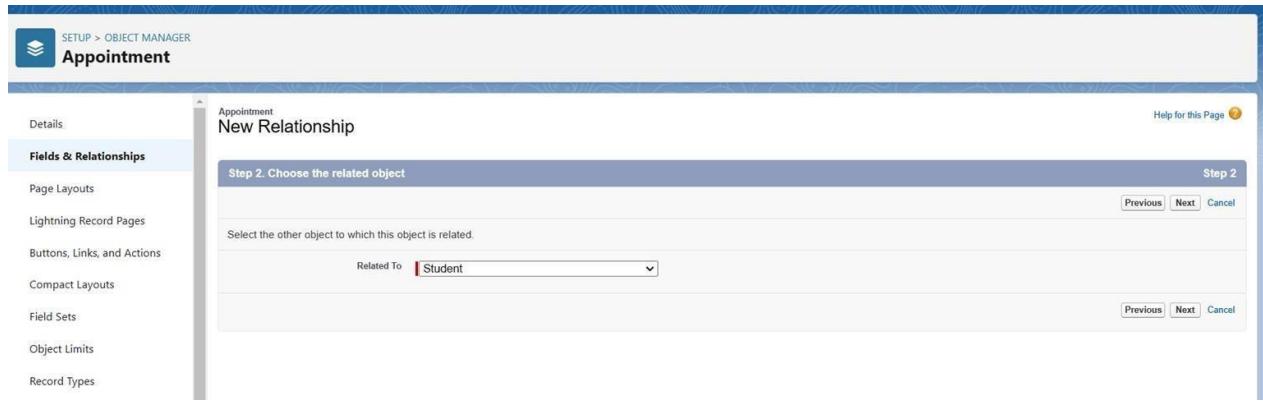
1. Create a **Lookup relationship** between **Appointment** and **Student** Object

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



The screenshot shows the "Appointment" object setup page. The left sidebar has options like "Details", "Fields & Relationships" (which is selected and highlighted with a red box), "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", and "Field Sets". The main content area is titled "SETUP > OBJECT MANAGER Appointment". It shows a list of field types: "Auto Number", "Formula", "Roll-Up Summary", "Lookup Relationship" (which is selected and highlighted with a red box), "Master-Detail Relationship", and "External Lookup Relationship". Each item has a brief description and some bullet points.

- Choose the related object for the relationship as **Student**

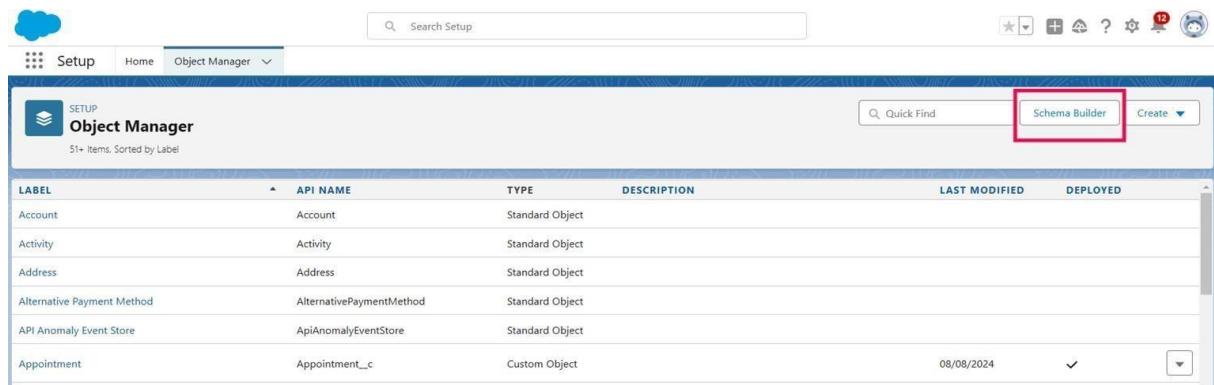


2. In the same way create **Lookup relationship** between the following:

- **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.

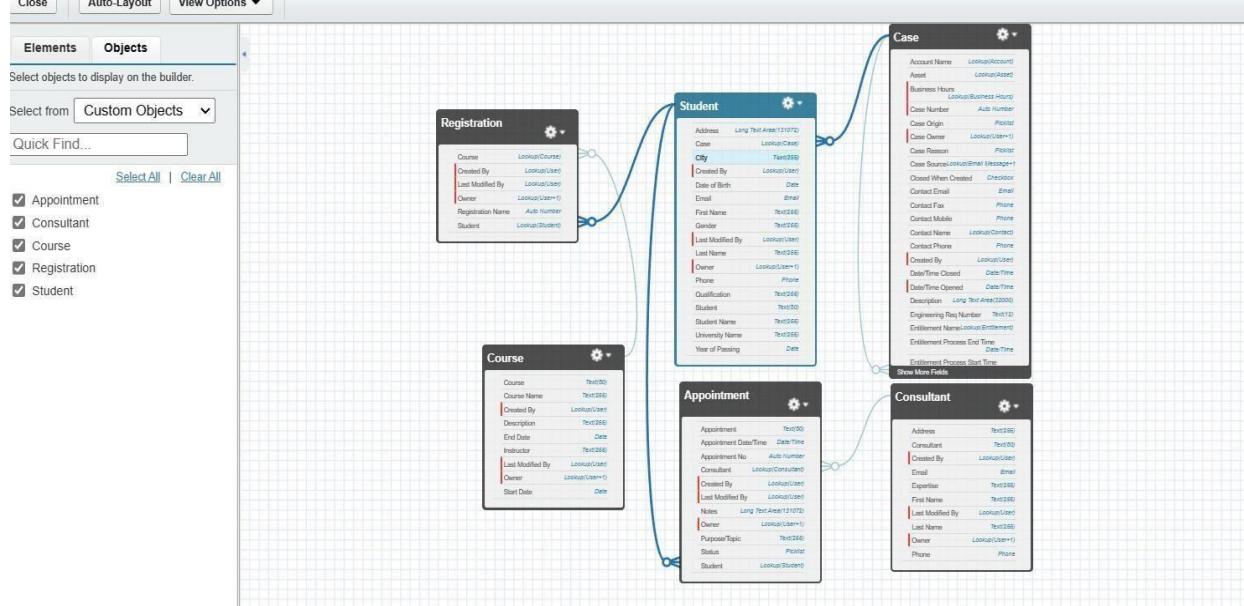


4. The data model will look like this:

Subtask



Schema Builder



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**

The Object Manager interface shows the **Case** object details. The **Fields & Relationships** section lists various fields and their types, including:

Field	Type	Description
Product	ProductId	Lookup(Product)
Service Contract	ServiceContractId	Lookup(Service Contract)
SLA Violation	SLAViolation__c	Picklist
Status	Status	Picklist
Stopped	IsStopped	Checkbox
Stopped Since	StopStartDate	Date/Time
Subject	Subject	Text(255)
Type	Type	Picklist
Web Company	SuppliedCompany	Text(80)
Web Email	SuppliedEmail	Email
Web Name	SuppliedName	Text(80)
Web Phone	SuppliedPhone	Text(40)

The **Type** field is highlighted with a red border.

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Mechanical	Mechanical	<input type="checkbox"/>	Assigned dynamically	Dipanwita Singha, 07/08/2024, 10:50 pm
Edit Del Deactivate	Electrical	Electrical	<input type="checkbox"/>	Assigned dynamically	Dipanwita Singha, 07/08/2024, 10:50 pm
Edit Del Deactivate	Electronic	Electronic	<input type="checkbox"/>	Assigned dynamically	Dipanwita Singha, 07/08/2024, 10:50 pm
Edit Del Deactivate	Structural	Structural	<input type="checkbox"/>	Assigned dynamically	Dipanwita Singha, 07/08/2024, 10:50 pm
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	Assigned dynamically	Dipanwita Singha, 07/08/2024, 10:50 pm
Edit Del Deactivate	Immigration	Immigration	<input type="checkbox"/>	Assigned dynamically	Dipanwita Singha, 08/08/2024, 1:33 am
Edit Del Deactivate	Visa Application	Visa Application	<input type="checkbox"/>	Assigned dynamically	Dipanwita Singha, 08/08/2024, 1:33 am

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

- Open
- In-progress

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Milestone Status	MilestoneStatus	Text(30)		
Status	Status	Picklist		

Subtask

Picklist Values Used

Active picklist values	6 (100 max)
Inactive picklist values	0

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Case Status Picklist Values

Action	Values	API Name	Closed	Default	Chart Colors	Modified By
Edit Deactivate	New	New	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assigned dynamically	Dipanwita Singha, 07/08/2024, 10:50 pm
Edit Del Deactivate	Working	Working	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Dipanwita Singha, 07/08/2024, 10:50 pm
Edit Del Deactivate	Escalated	Escalated	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Dipanwita Singha, 07/08/2024, 10:50 pm
Edit Del Deactivate	Closed	Closed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Dipanwita Singha, 07/08/2024, 10:50 pm
Edit Del Deactivate	Open	Open	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Dipanwita Singha, 08/08/2024, 1:32 am
Edit Del Deactivate	In-progress	In-progress	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Dipanwita Singha, 08/08/2024, 1:32 am

4: Create a Lightning App

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

Search Setup

Setup Home Object Manager

app manager

Apps

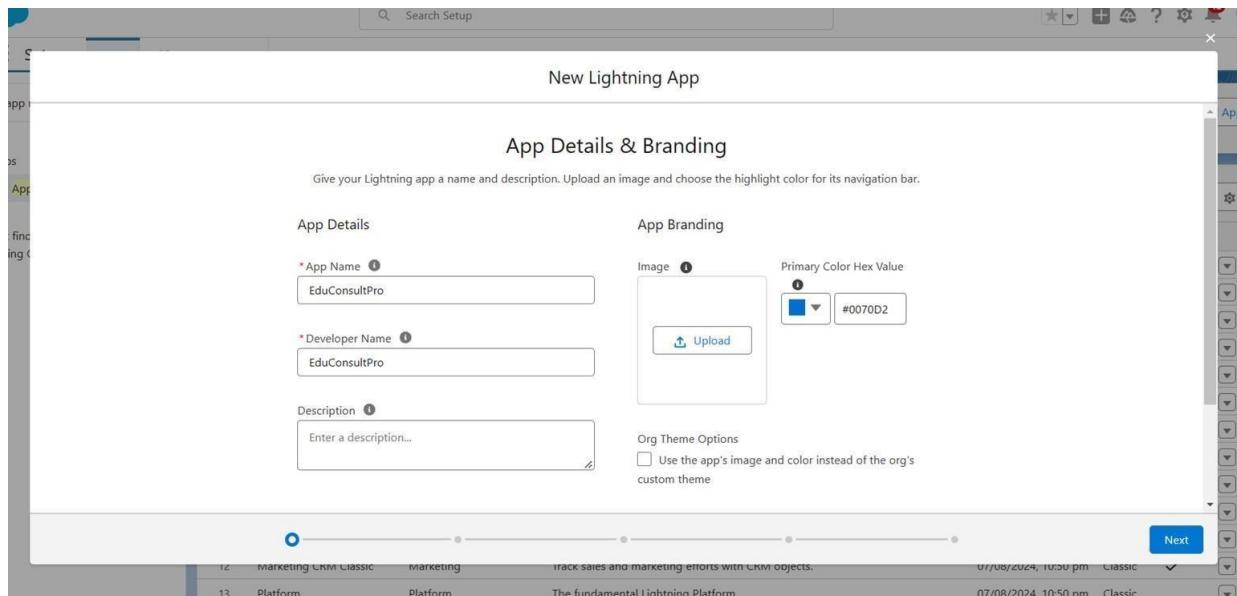
App Manager

Lightning Experience App Manager

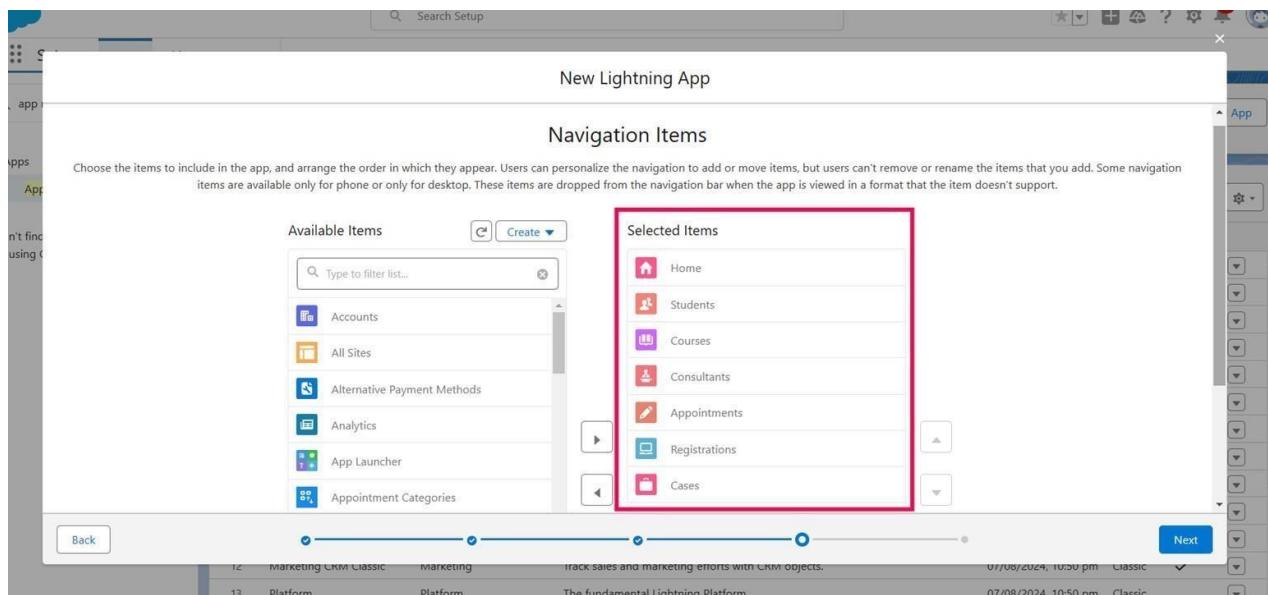
New Lightning App New Connected App

App Name ↑	Developer Name	Description	Last Modified ...	Ap... ↴	Vi... ↴
1 All Tabs	AllTabSet		07/08/2024, 10:50 pm	Classic	▼
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	07/08/2024, 10:50 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	07/08/2024, 10:50 pm	Classic	✓
4 Automation	FlowsApp	Automate business processes and repetitive tasks.	07/08/2024, 10:53 pm	Lightning	✓
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	07/08/2024, 10:52 pm	Lightning	✓
6 Community	Community	Salesforce CRM Communities	07/08/2024, 10:50 pm	Classic	✓
7 Content	Content	Salesforce CRM Content	07/08/2024, 10:50 pm	Classic	✓
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	07/08/2024, 10:50 pm	Lightning	✓
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	07/08/2024, 10:50 pm	Lightning	✓

3. Name the app **EduConsultPro**.

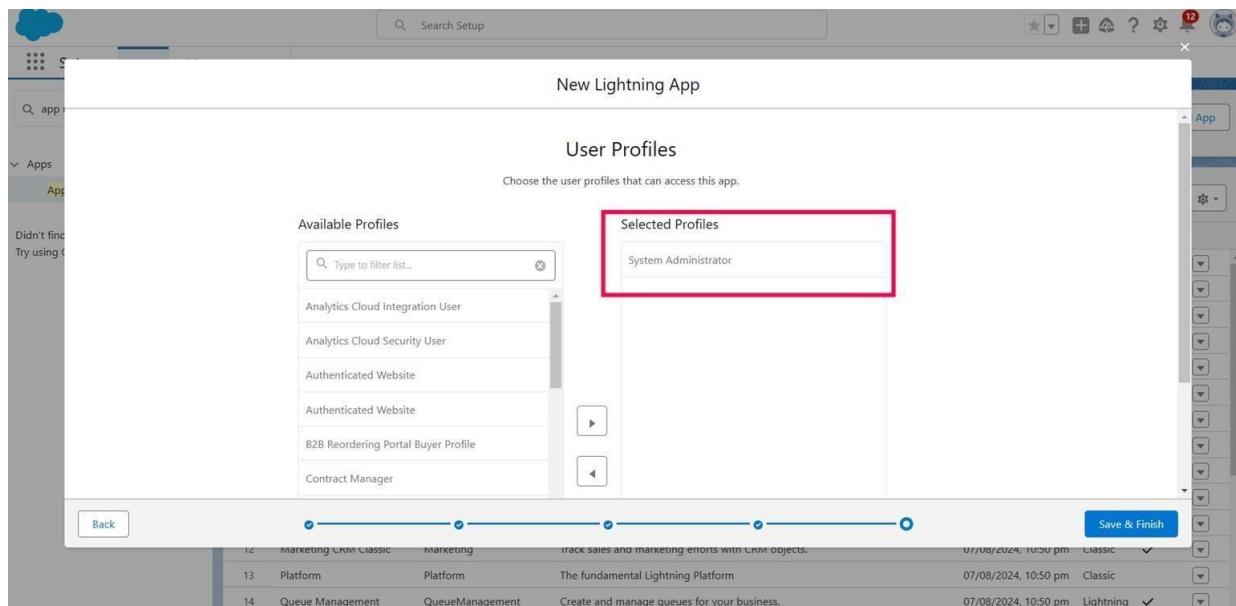


4. Add the following items from the Available Items list to the Selected Items list:
- **Home, Students, Courses, Consultants, Appointments, Registrations, Cases**

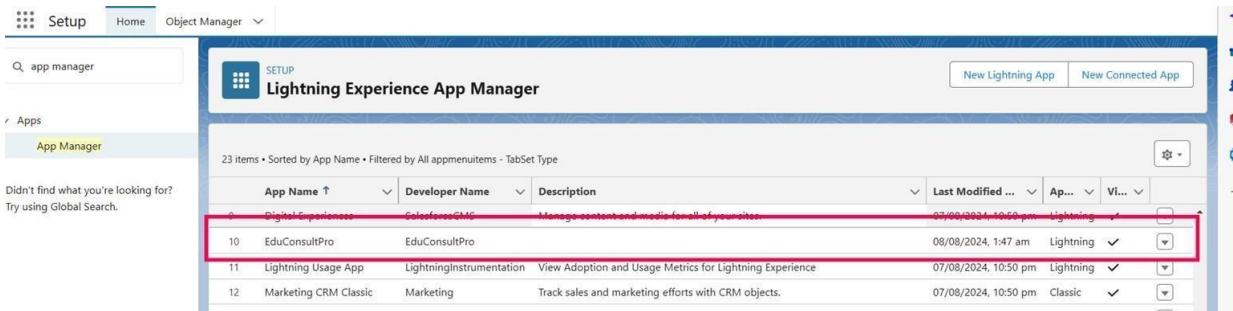


5. Add the **System Administrator** profile from Available Profiles to Selected Profiles and click **Save & Finish**.

Subtask



6. **EduConsultPro** app is created.



The screenshot shows the Salesforce Setup interface with the "App Manager" selected. The main title is "Lightning Experience App Manager". A search bar at the top left contains "app manager". Below it, a message says " Didn't find what you're looking for? Try using Global Search." The main area displays a table of apps with the following data:

App Name ↑	Developer Name	Description	Last Modified ...	Ap... ↴	Vi... ↴
0 Digital Experience	Salesforce CMS	Manage content and assets for all of your sites.	07/08/2024, 10:50 pm	Lightning ✓	⋮
10 EduConsultPro	EduConsultPro		08/08/2024, 1:47 am	Lightning ✓	⋮
11 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	07/08/2024, 10:50 pm	Lightning ✓	⋮
12 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	07/08/2024, 10:50 pm	Classic ✓	⋮

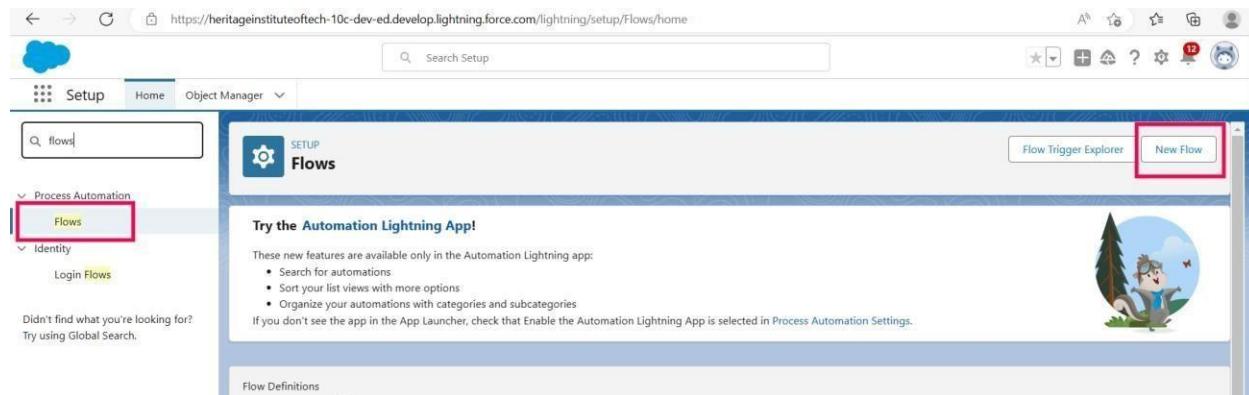
TASK 4: Create A ScreenFlow For Student Admission Application Process

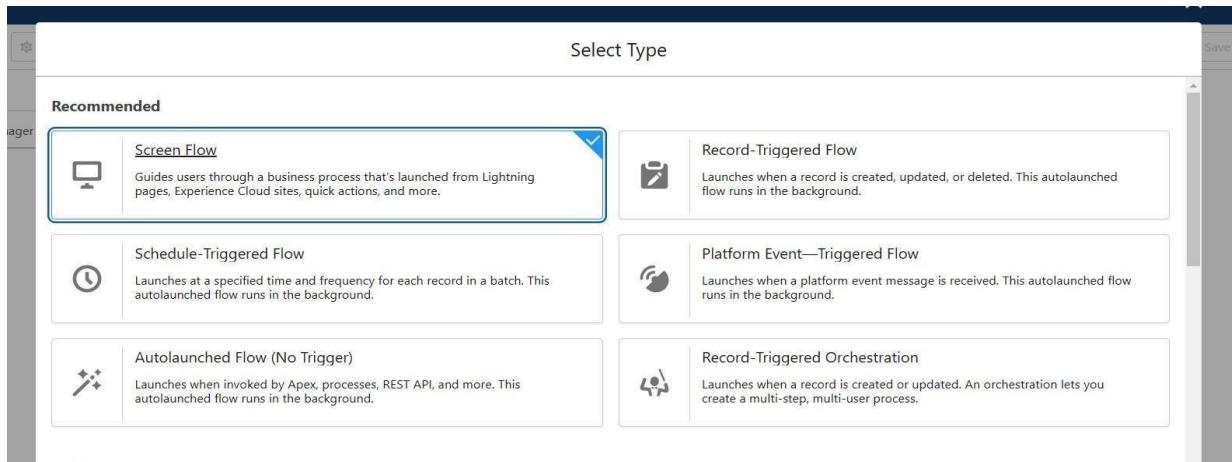
Design a ScreenFlow to automate the student admission process, including data capture, record creation, course selection, and email notifications.

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**.

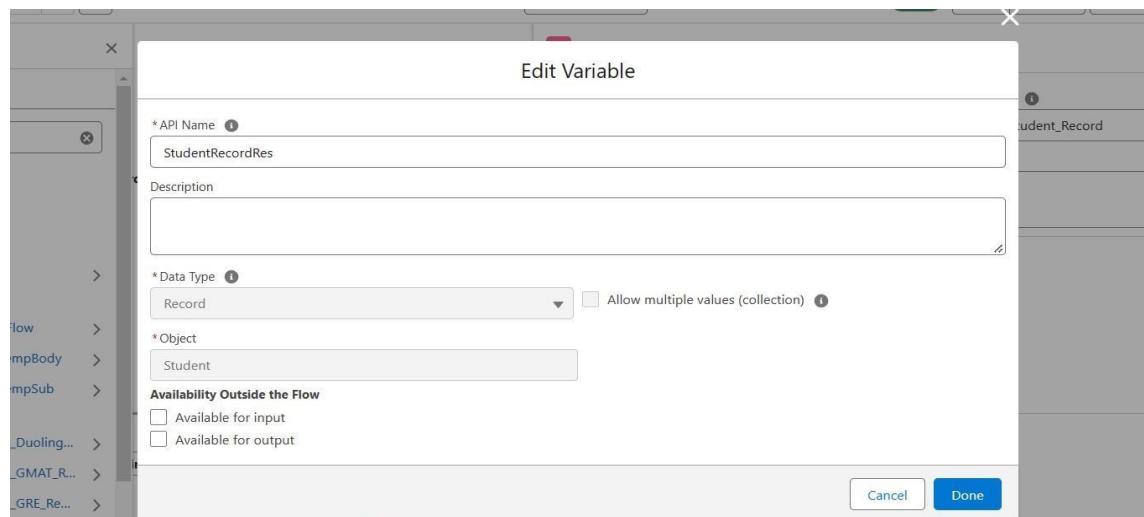


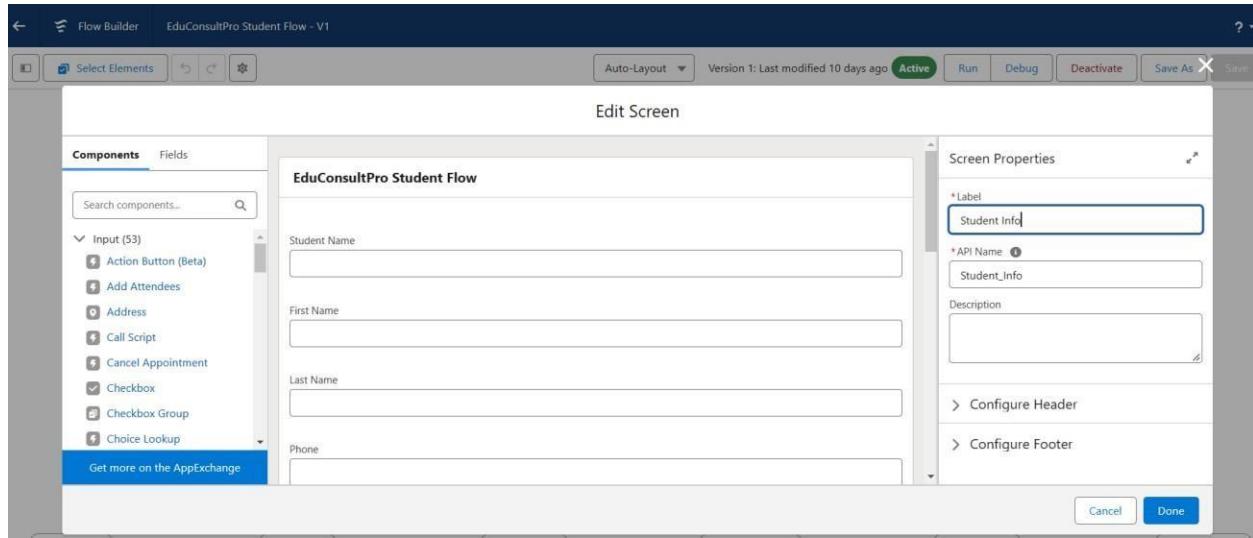


2. Add a Screen element.

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”.
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**.

Create Records

X

* Label

Create Student Record

* API Name 

Create_Student_Record

Description

* How to set record field values

From a Record Variable



How Many Records to Create

One

Multiple

Create a Record from These Values

* Record

 StudentRecordRes X

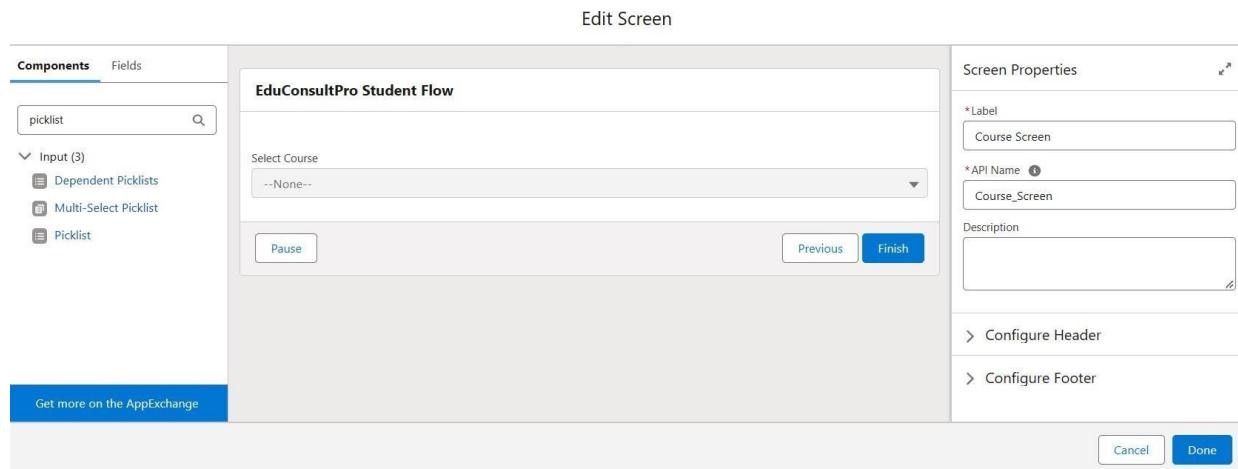
Make sure that ID is blank. After the flow creates the records, ID is set to match the record that was created. 

Subtask Add

3: Course Selection Screen

Provide a screen for students to select a course.

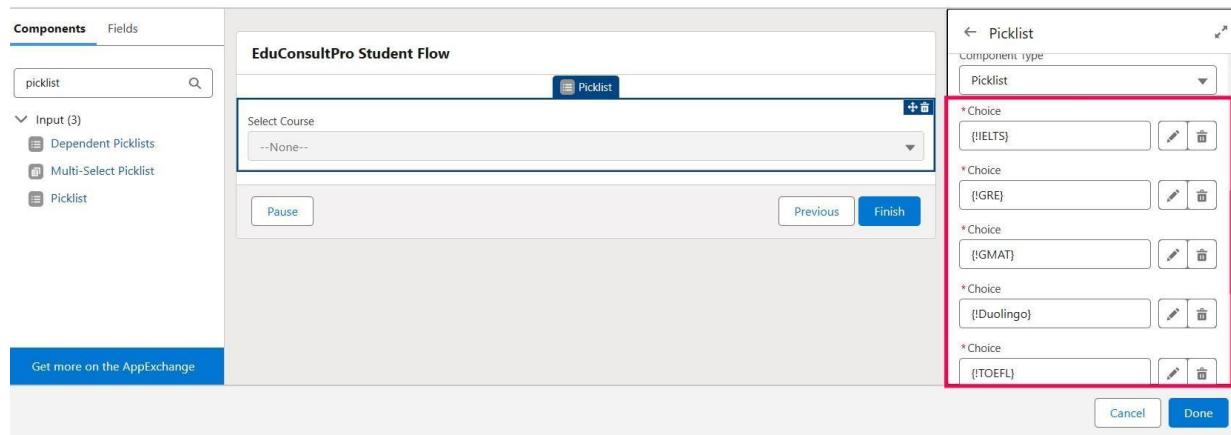
1. Add a **Screen** element after the Create Student Record element.
2. **Label:** “Course Screen”.



3. Add a **Picklist** component:
 - **Label:** “Select Course”. ▪ **Choices:** Enter “IELTS”, “GRE”, “GMAT”, “Duolingo”, and “TOEFL”.

Subtask Add

Edit Screen



4: 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.

Subtask Add

The screenshot shows a 'Decision' subtask configuration screen. At the top, there are fields for 'Label' ('Selecting Course') and 'API Name' ('Selecting_Course'). Below these is a 'Description' section with a large text area. A 'Outcomes' section follows, containing a table for defining outcomes based on test types (IELTS, GRE, GMAT, Duolingo, TOEFL) and a default outcome. Each row in the table includes a 'Label' field (e.g., 'Selected IELTS'), an 'API Name' field ('Selected_IELTS'), and a 'Condition Requirements to Execute Outcome' dropdown set to 'All Conditions Are Met (AND)'. Below this is a condition editor with fields for 'Resource' ('Course Screen > Select_Course'), 'Operator' ('Equals'), and 'Value' ('IELTS'). A 'Delete Outcome' button is also present.

5: 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 Add

Get Records

* Label	* API Name
Get IELTS Rec	Get_IELTS_Rec

Description

Get Records of This Object

* Object

Course

Filter Course Records

Condition Requirements

All Conditions Are Met (AND)

Field	Operator	Value
Name	Equals	Aa Select_Course X

+ Add Condition

Sort Course Records

Sort Order

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}

The screenshot shows the 'Create Records' configuration interface. It includes sections for 'Create IELTS Registration Rec' (Label), 'Create_IELTS_Registration_Rec' (API Name), 'Description' (empty), 'How to set record field values' (Manually), 'Create a Record of This Object' (Object: Registration), and 'Set Field Values for the Registration' (Fields: Course_c and Student_c with their respective API values).

Create Records

* Label: Create IELTS Registration Rec

* API Name: Create_IELTS_Registration_Rec

Description

* How to set record field values: Manually

Create a Record of This Object

* Object: Registration

Set Field Values for the Registration

Field	Value
Course_c	Aa Course from GetIELTSRec > Record ID X
Student_c	Aa StudentRecordRes > Record ID X

+ Add Field

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.

Edit Text Template

* API Name i

Description

* Body i

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.

Cancel Done

5. Repeat to create an email text template for the subject, **API Name:**
“StuRegistrationEmailTextTempSub”.

Subtask

Edit Text Template

* API Name i

StuRegistrationEmailTextTempSub

Description

* Body i

Insert a resource... View as Plain Text ▾

Dear {!StudentRecordRes.Name},

Congratulations and welcome to EduConsultantPro!

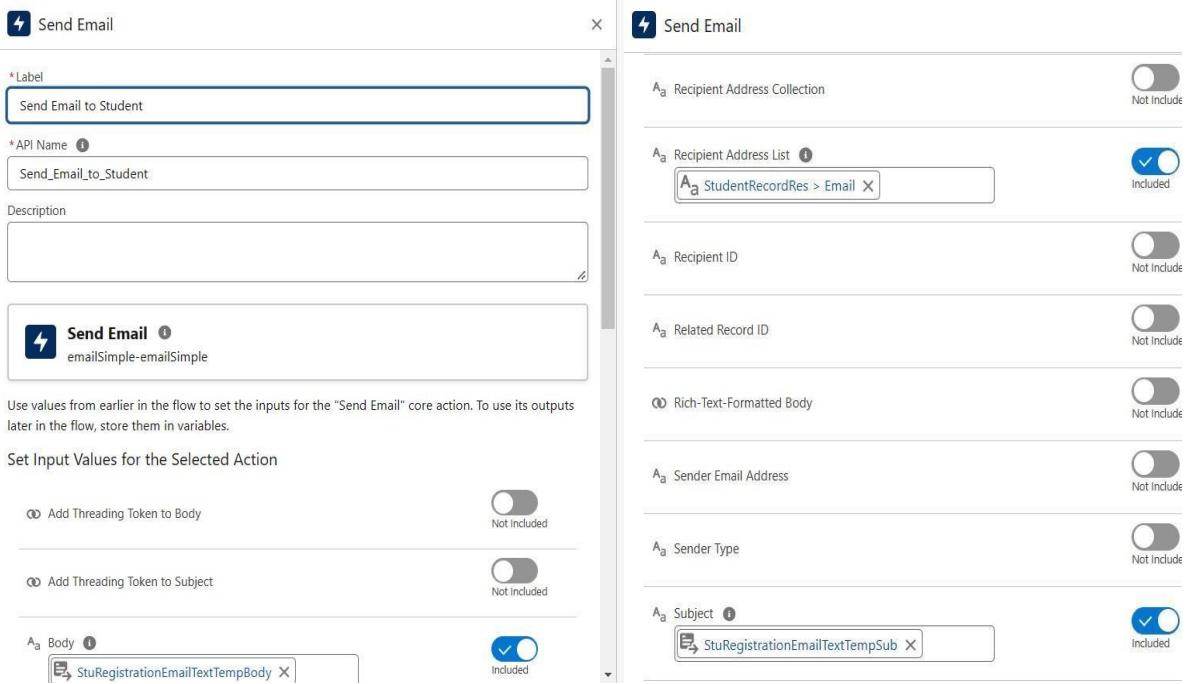
We are delighted to inform you that your registration on our platform has been successfully completed. You are now part of our esteemed community dedicated to empowering students like you to achieve their educational and immigration aspirations.

Cancel Done

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.

Edit Screen

Components

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 Student Flow

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.
 Your Registration details have been sent through mail kindly check it once.
 Thank you.

[Pause](#) [Previous](#) [Finish](#)

Screen Properties

*Label

*API Name

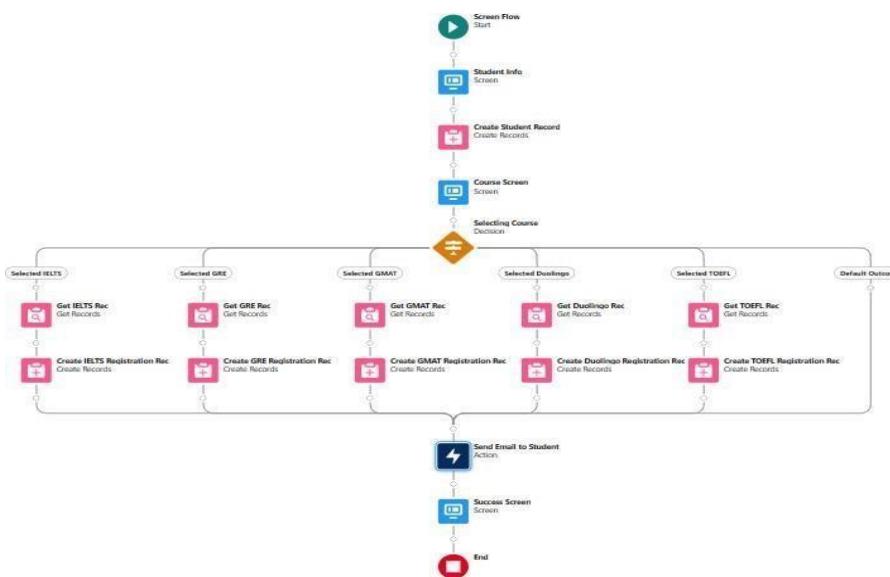
Description

> Configure Header

> Configure Footer

[Cancel](#) [Done](#)

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**.

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The sidebar on the left has 'Users' highlighted. The main content area displays a list of users under the heading 'All Users'. The columns include Action, Full Name, Alias, Username, Role, Active, and Profile. A specific user, 'Consultant', is highlighted with a red box around their name in the 'Last Name' field.

2. Enter the following details:

- **Last Name:** Consultant
- **License:** Salesforce Platform
- **Profile:** Standard Platform User

3. Complete all mandatory fields as required and save.

The screenshot shows the 'User Edit' page for a user named 'Consultant'. The 'General Information' section is displayed, showing various fields like First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Last Name' field is filled with 'Consultant' and highlighted with a red box. The 'User License' dropdown menu is open, showing 'Salesforce Platform' selected, which is also highlighted with a red box.

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.

The screenshot shows the 'Users' edit page in Salesforce. At the top, there's a 'SETUP' button and a 'Users' icon. Below that, there are fields for Street, City, Zip/Postal Code, State/Province, and Country (set to IN). A 'Single Sign On Information' section follows, containing a 'Federation ID' field. Under 'Locale Settings', there are dropdowns for Time Zone (selected: (GMT+05:30) India Standard Time (Asia/Kolkata)), Locale (selected: English (India)), and Language (selected: English). The 'Approver Settings' section is highlighted with a red box. It contains a 'Delegated Approver' field with a search icon, a 'Manager' field with a search icon (also highlighted with a red box), and a dropdown for 'Receive Approval Request Emails' (set to 'Only if I am an approver'). At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

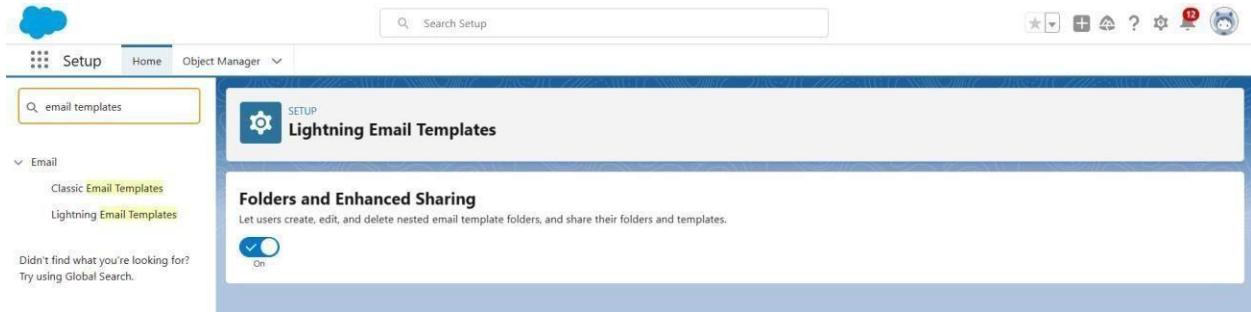
Task 6: Create an Approval Process for the Property Object

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

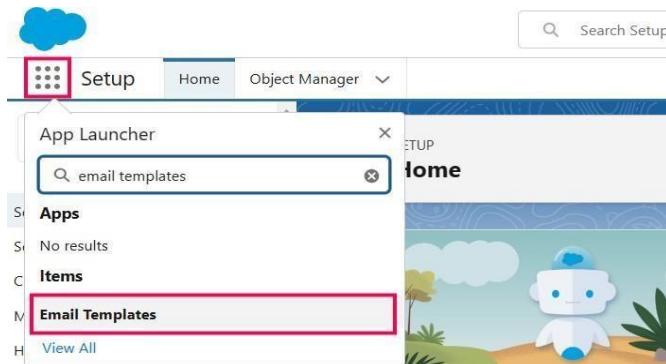
Subtask 1: Create Email Templates

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

Related Entity Type

Description

Folder

Message Content

Subject

Enhanced Letterhead

HTML Value

HTML Value

Dear {{Appointment_c.Student_Name_c}},

I hope this email finds you well. I am writing to confirm the details of our upcoming appointment scheduled 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

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 Approval Request Template

* = Required Information

Information

* Email Template Name

Approval Request Template

Related Entity Type

-- None --

Description

(Empty)

Folder

EduConsultantpro_Email

Select Folder

Edit Rejection Request Template

* = Required Information

Information

* Email Template Name

Rejection Request Template

Related Entity Type

-- None --

Description

(Empty)

Folder

EduConsultantpro_Email

Select Folder

Email Templates						
Recent						
3 items						
Email Templates	Email Template Name	Description	Folder	Last Modified By	Last Modified Date	
Recent	Approval Request Template		EduConsultantpro_Email	Dipanwita Singha	8/8/2024, 2:22 pm	
Created by Me	Submission Template		EduConsultantpro_Email	Dipanwita Singha	8/8/2024, 2:09 pm	
Private Email Templates	Rejection Request Template		EduConsultantpro_Email	Dipanwita Singha	8/8/2024, 2:21 pm	

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**.

- Click **Create New Approval Process** and choose **Use Jump Start Wizard**.

The screenshot shows the Salesforce Setup interface. In the top left, there's a cloud icon, 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup'. On the right, there are various icons. The main area has a blue header 'SETUP Approval Processes'. Below it, a section titled 'Appointment' contains a help box with steps 1-7. A dropdown menu 'Manage Approval Processes For: Appointment' has a red box around 'Use Jump Start Wizard'. At the bottom, a table lists 'ACTIVE APPROVAL PROCESSES' with columns for Action, Process Order, Approval Process Name, and Description.

- Configure the approval process:

- Process Name:** Appointment Approval
- Approver Selection:** Select **Manager** for “Automatically assign an approver using a standard or custom hierarchy field.”

The screenshot shows the 'Select Approver' configuration screen. It has a 'Select Approver' tab. Below it, a note says 'Using the options below, specify the user to whom the approval request should be assigned.' There are four radio button options: 'Let the submitter choose the approver manually.', 'Automatically assign an approver using a standard or custom hierarchy field.' (which is selected), 'Automatically assign to queue.' (with a dropdown menu showing 'Manager'), and 'Automatically assign to approver(s.)'. A note at the bottom says 'Because this is the Jump Start Wizard, Salesforce automatically chooses some settings for you.' with a 'Show More' link. At the bottom are 'Save' and 'Cancel' buttons.

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

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 user approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked by the currently assigned approver to edit the record.

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By

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

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	<input type="checkbox"/> i

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

Email Alert Edit

Edit Email Alert

Description	Submission Email Alert
Unique Name	Submission_Email_Alert
Object	Appointment
Email Template	Submission Template
Protected Component	<input type="checkbox"/>

Recipient Type

Recipients

Available Recipients	Selected Recipients
User: Consultant User: Integration User User: Security User	User: Dipanwita Singha
Add	Remove

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

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

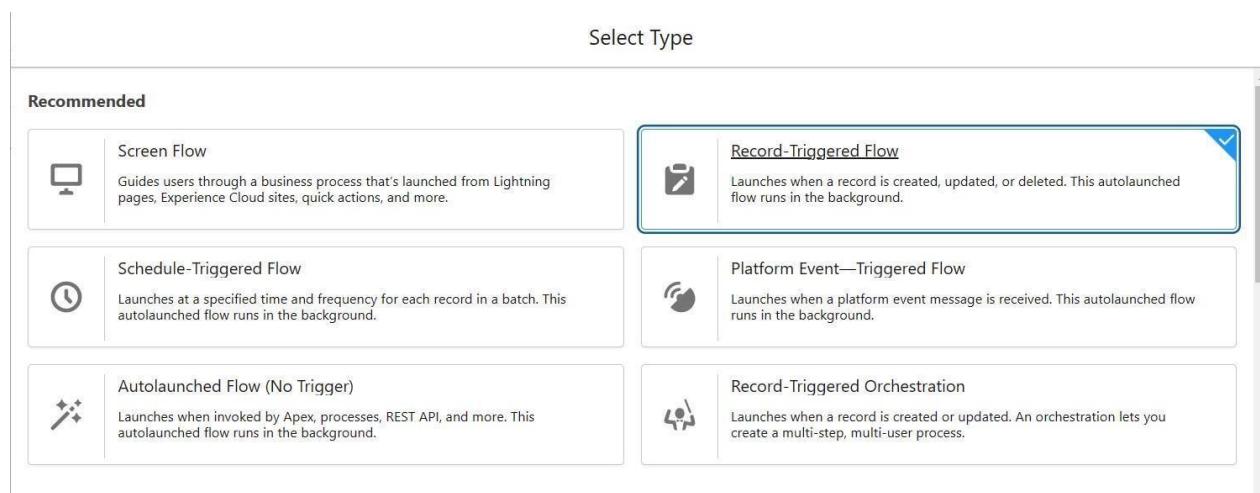
Task 7: Create A Record-Triggered Flow

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**.

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

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}**.

Submit for Approval

* Label
Approval SubFlow

* API Name [i](#)
Approval_SubFlow

Description

Submit for Approval [i](#)
submit-submit

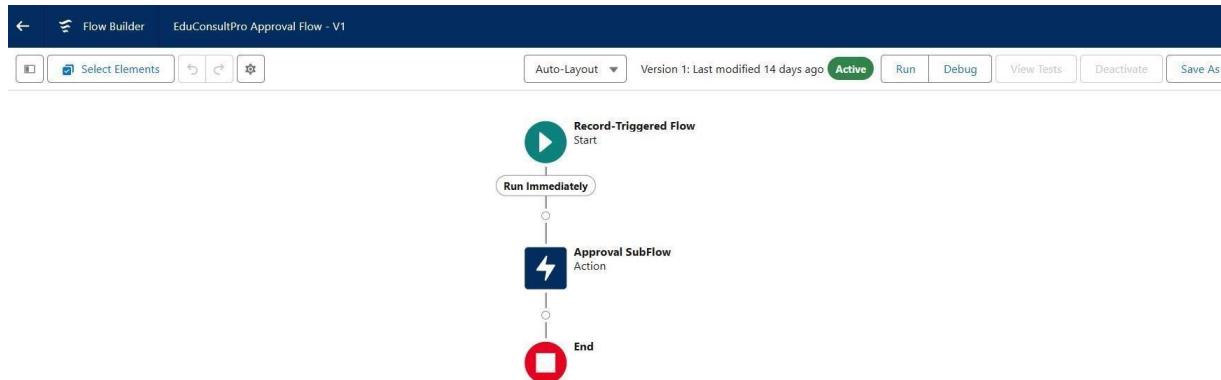
Use values from earlier in the flow to set the inputs for the "Submit for Approval" core action. To use its outputs later in the flow, store them in variables.

Set Input Values for the Selected Action

Aa * Record ID [i](#)
Aa Triggering Appointment_c > Record ID X

Aa Approval Process Name Or ID [i](#)
Not Included

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

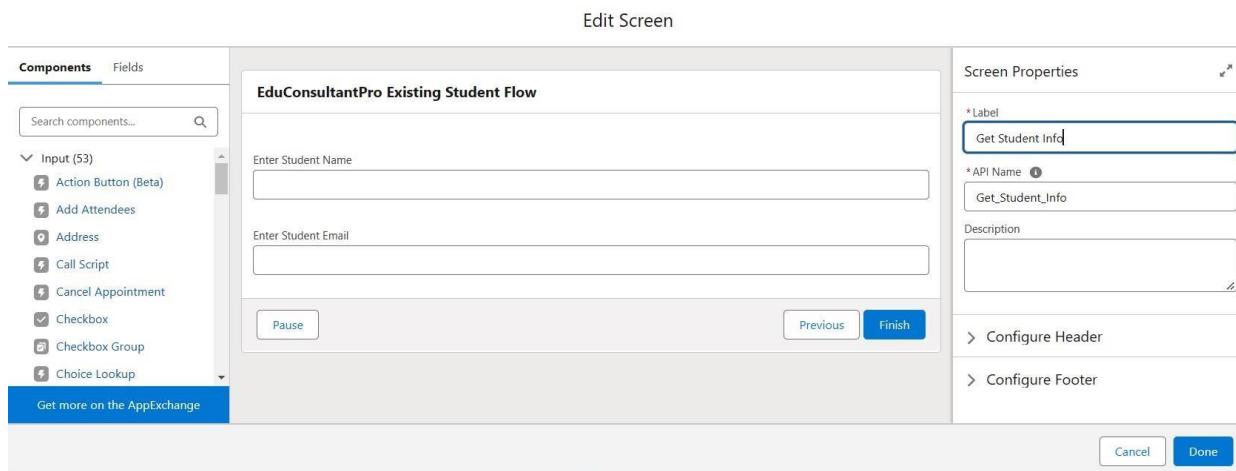


Task 8: Create A ScreenFlow For Existing Students To Book An Appointment

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

1.

2: Get Record

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

Subtask Add

1.

 Get Records X

* Label * API Name

Description

Get Records of This Object

* Object

Filter Student Records

Condition Requirements

Field Operator Value Delete

Field Operator Value Delete

AND

o **Value:** {!Enter_Student_Email}

Subtask Add

1.

3: a Decision Element

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.

Subtask Add

1.

The screenshot shows the configuration of a 'Decision' element. At the top, there are fields for 'Label' (Appointment or Case) and 'API Name' (Appointment_or_Case). Below this is a 'Description' section with an empty text area. The 'Outcomes' section is expanded, showing two outcome details: 'Appointment' and 'Case'. Each outcome has a 'Label' field (Appointment for both) and an 'Outcome API Name' field (Appointment for both). Under 'Default Outcome', the condition 'All Conditions Are Met (AND)' is selected. A single condition is defined with a Resource ('A_a How_may_I_Help_you'), Operator ('Equals'), and Value ('A_a Book_an_Appointment'). A '+' button is available to add more conditions.

4: Screen Element

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 Add

1.

Edit Screen

EduConsultantPro Existing Student Flow

Appointment Date/Time

Date Time

Purpose/Topic

Notes

Screen Properties

*Label

*API Name

Description

> Configure Header

> Configure Footer

Cancel Done

Subtask Add

1.

2.

5: GET Record Element

Add a **GET Record** element after the Decision element, under the Appointment path, and label it as “**Get Consultant Rec**”. 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

1.

2.

 Get Records X

* Label	* API Name (i)	
Get Consultant Rec	Get_Consultant_Rec	
Description		
<div style="height: 50px; border: 1px solid #ccc; margin-top: 10px;">Get Records of This Object</div>		
* Object		
Consultant		
Filter Consultant Records		
Condition Requirements		
All Conditions Are Met (AND) ▾		
Field	Operator	Value
Name	Equals	A_a AppointmentRecordRes > Ap... X Delete
+ Add Condition		

6: Create Appointment Record Using Create Records Element

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

Configure the Create element:

▪ **Select Object:** Appointment

▪ **Field Values:**

○ **Appointment_DateTime_c:**

 {!AppointmentRecordRes.Appointment_DateTime_c}

○ **Consultant_c:** {!Get_Consultant_Rec.Id}

Subtask

- 1.
2.
 - **Notes_c:** {!AppointmentRecordRes.Notes_c}
 - **PurposeTopic_c:** {!AppointmentRecordRes.PurposeTopic_c}
 - **Student_Name_c:** {!Get_Rec.Id}

 Create Records ×

* Label	* API Name (i)
Create Appointment	Create_Appointment
Description	
<div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div>	
* How to set record field values	
Manually	
Create a Record of This Object	
* Object	
Appointment	
Set Field Values for the Appointment	
Field	Value
Appointment_DateTime__c	 AppointmentRecordRes > Appointment Date/... X Delete
Field	Value
Consultant__c	 Consultant from Get_Consultant_Rec > Record ... X Delete
Field	Value
Notes__c	 AppointmentRecordRes > Notes X Delete

7: Add Screen Element

Add a **Screen** element after the Create Appointment element, and label it as “**Confirmation Screen**”.

Subtask

1.

2.

From the left side panel, search for the **Display Text** component and drag it to the main panel, label it as “**Appointment_Confirmation**”.

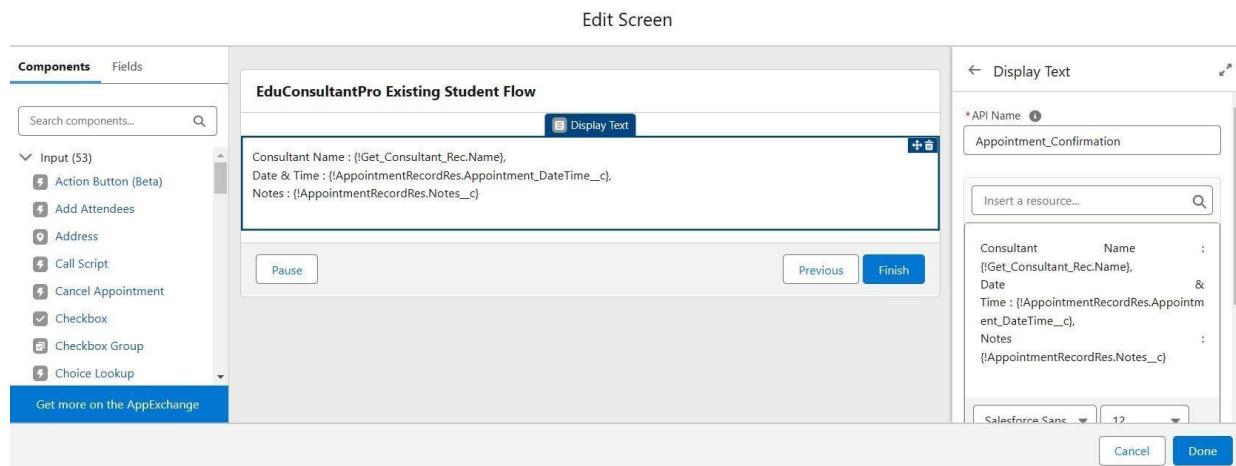
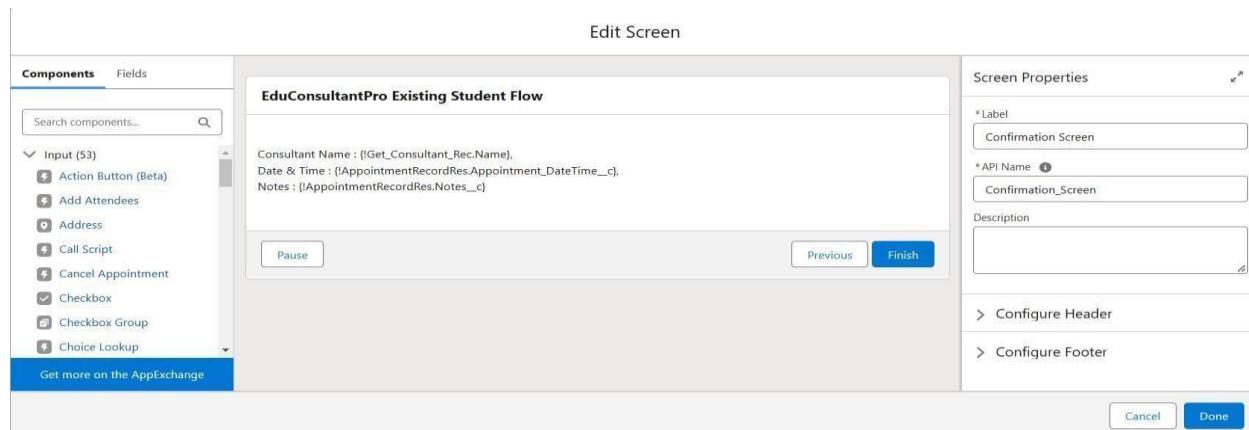
3. Paste the following text in the Resource picker box: Consultant

Name : {!Get_Constant_Rec.Name},

Date & Time : {!AppointmentRecordRes.Appointment_DateTime_c},

Notes : {!AppointmentRecordRes.Notes_c}

4. Click Done.



Subtask

1.

2.

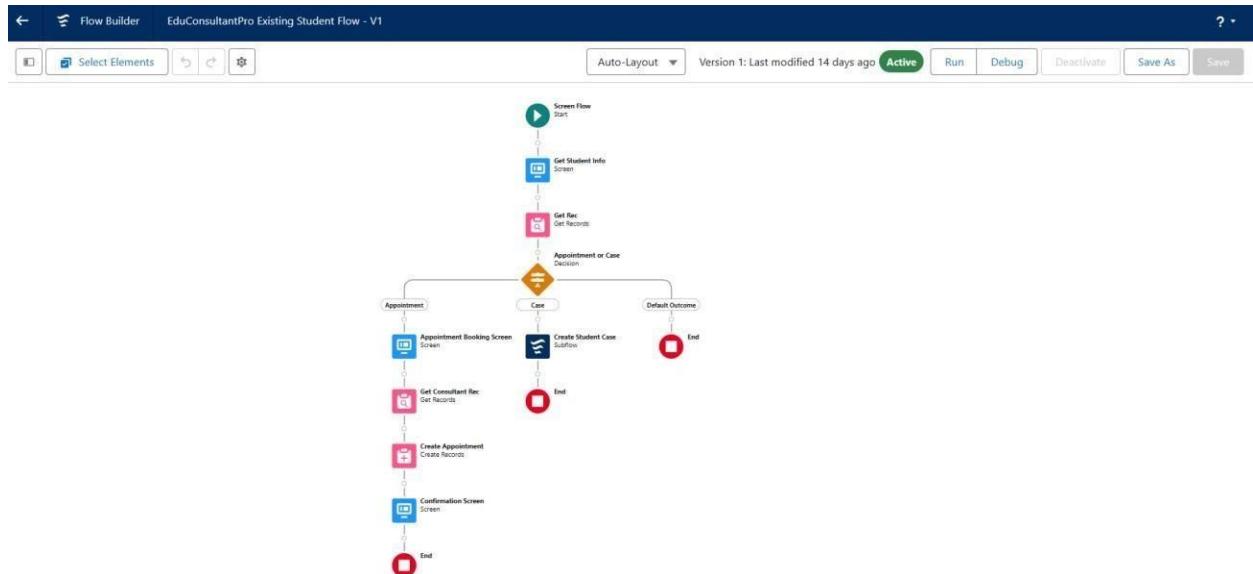
Subtask

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.



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.

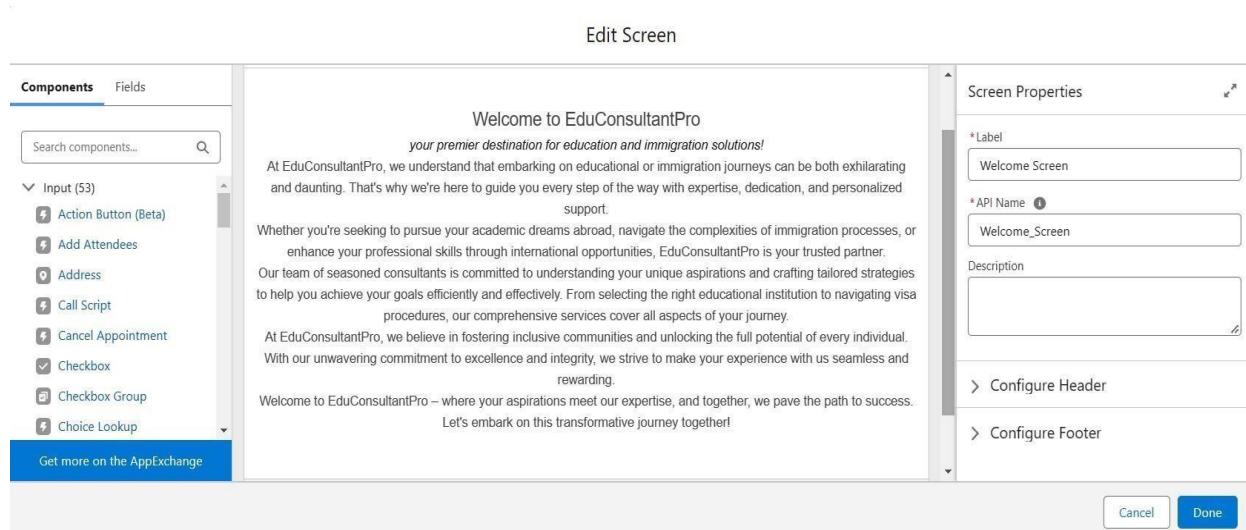
Whether you're seeking to pursue your academic dreams abroad, navigate the complexities of immigration processes, or enhance your professional skills through international opportunities, EduConsultantPro is your trusted partner.

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.

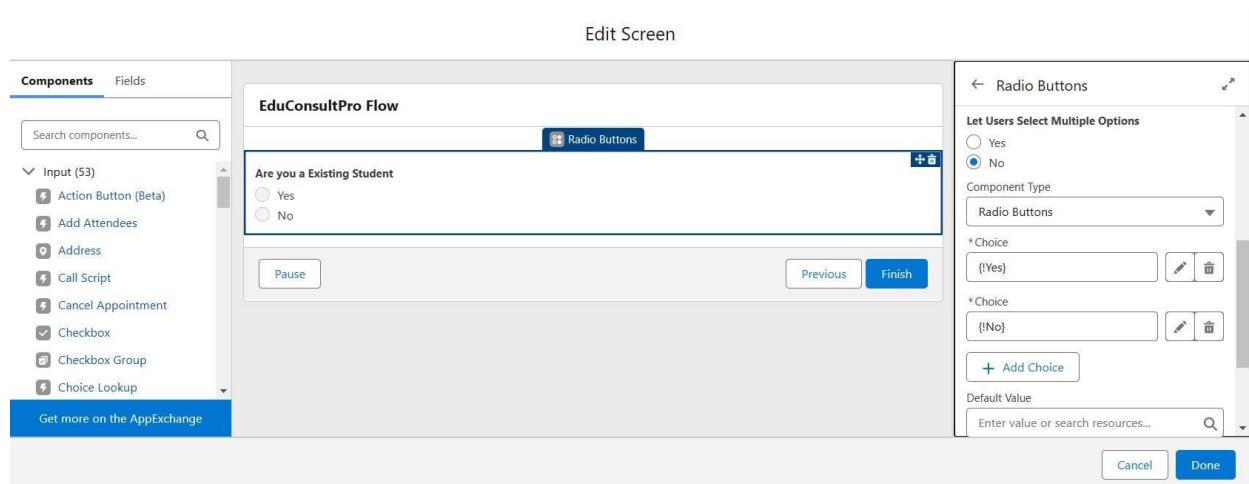
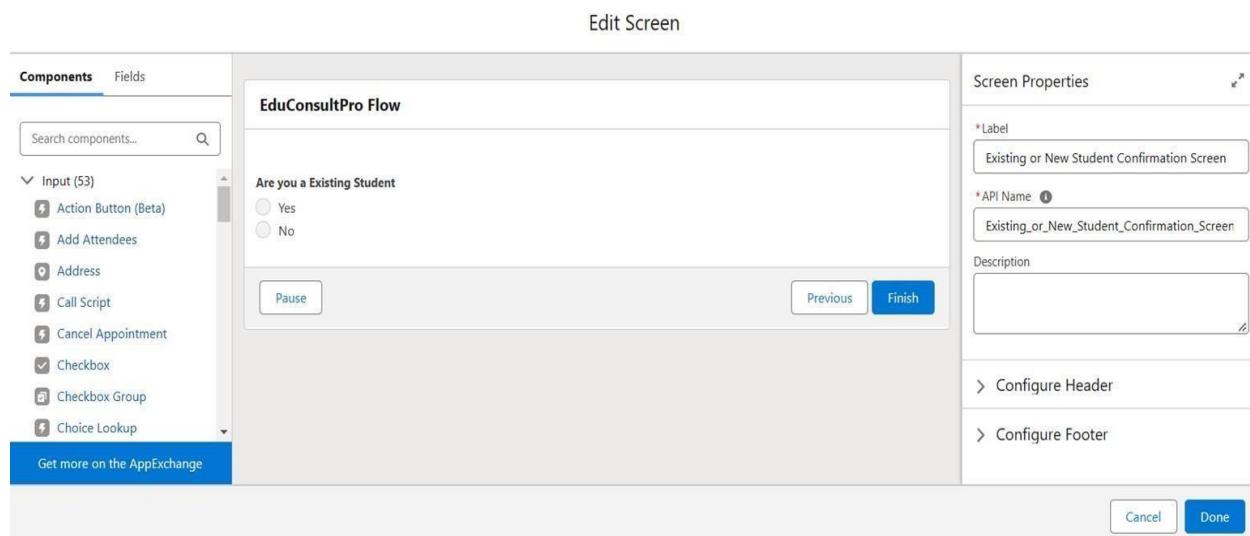


Subtask 2: Add Existing or New Student Confirmation Screen

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.



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.

Decision

* Label: Decision 1 * API Name: Decision_1

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	Actions
If Existing Student	* Label: If Existing Student * Outcome API Name: If_Existing_Student Condition Requirements to Execute Outcome: All Conditions Are Met (AND)	Delete Outcome
If not a existing user	* Label: If not a existing user * Outcome API Name: If_Not_a_Existing_User Condition Requirements to Execute Outcome: All Conditions Are Met (AND)	
Default Outcome		

OUTCOME ORDER **OUTCOME DETAILS** **Delete Outcome**

If Existing Student * Label: If Existing Student * Outcome API Name: If_Existing_Student
Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

If not a existing user * Label: If not a existing user * Outcome API Name: If_Not_a_Existing_User
Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Default Outcome

Resource: Aa ... > Are_you_a_Existing_Student Operator: Equals Value: Aa Yes

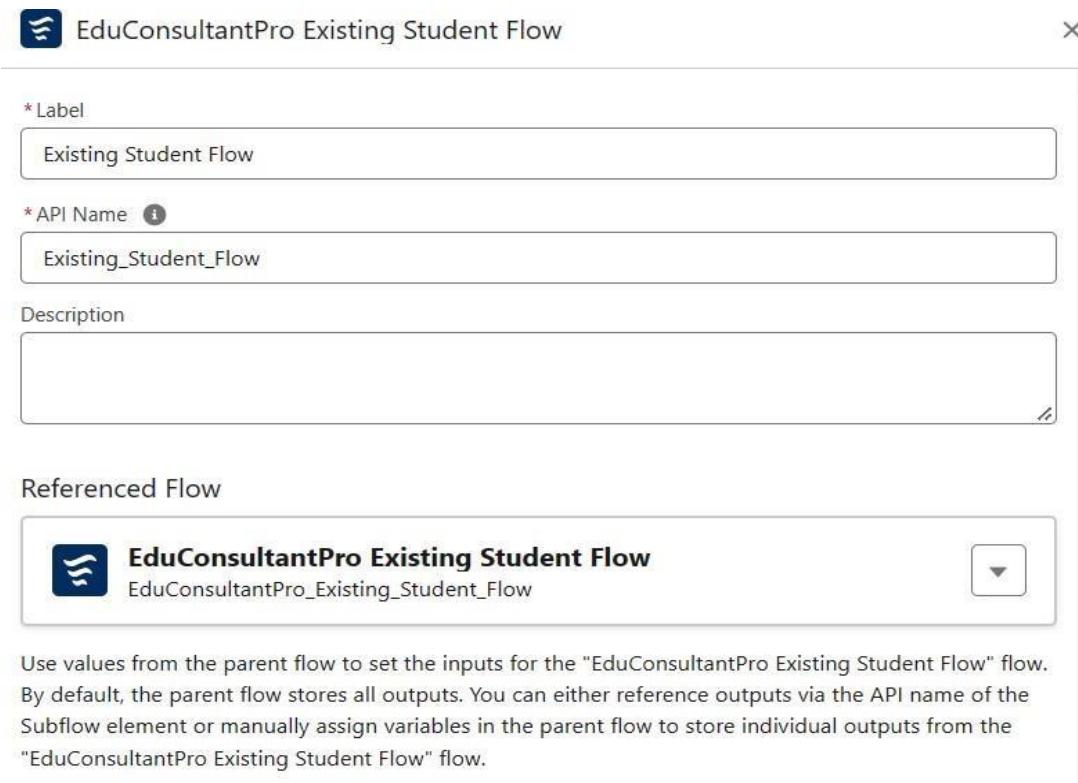
+ Add Condition

Resource: Aa ... > Are_you_a_Existing_Student Operator: Equals Value: Aa 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 i
New_Student_Flow

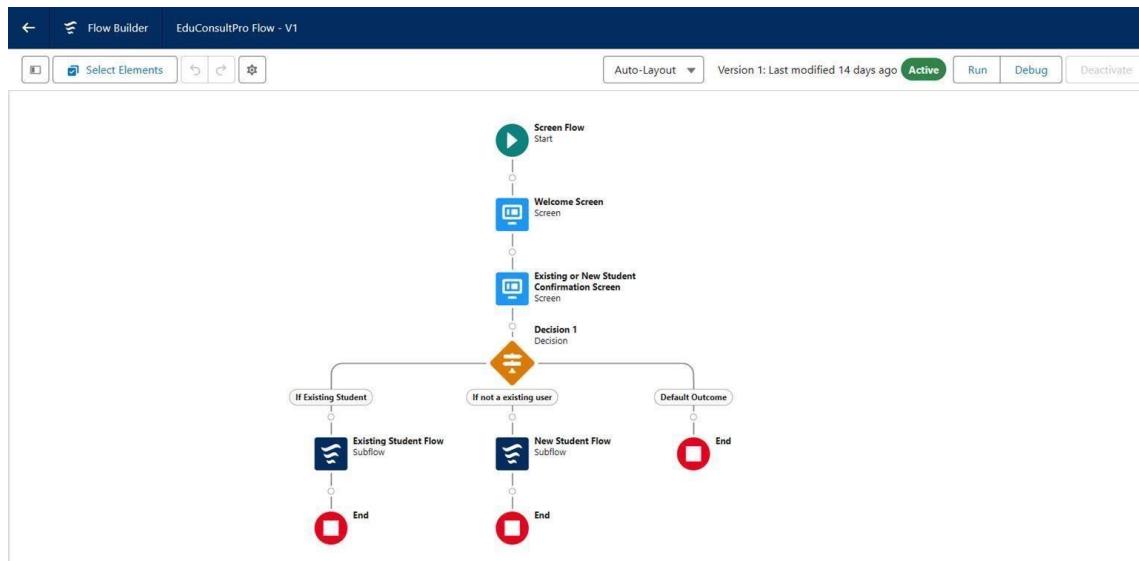
Description

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.

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



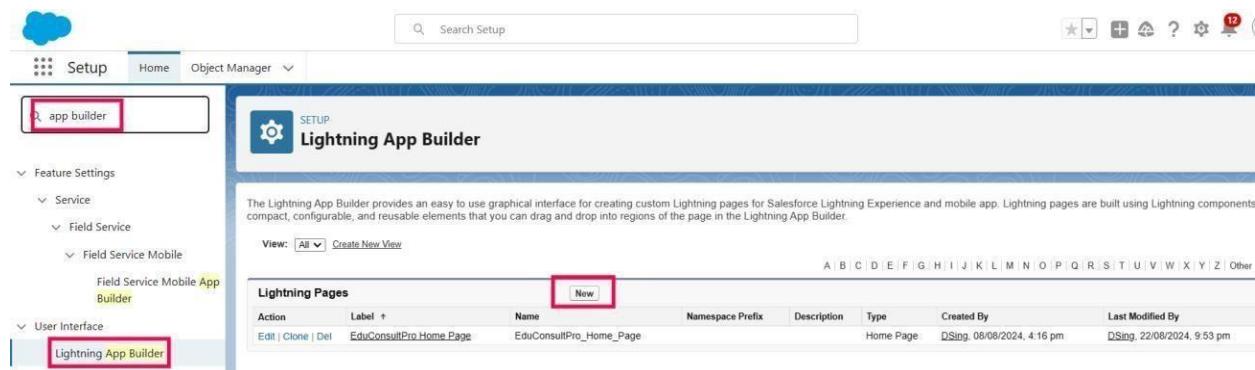
Task 10: Create A Lightning App Page

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

The screenshot shows a left sidebar with options: App Page, Home Page (highlighted with a red box), Record Page, Embedded Service Page, and Voice Extension. To the right is a preview area titled "Customize the Lightning Experience Home page." It displays a Sales dashboard titled "My Quarterly Performance" with a chart showing revenue trends from August to October. On the right side of the dashboard, there's an "Einstein (10+)" summary section with various activity metrics. A "Next" button is at the bottom right of the preview area.

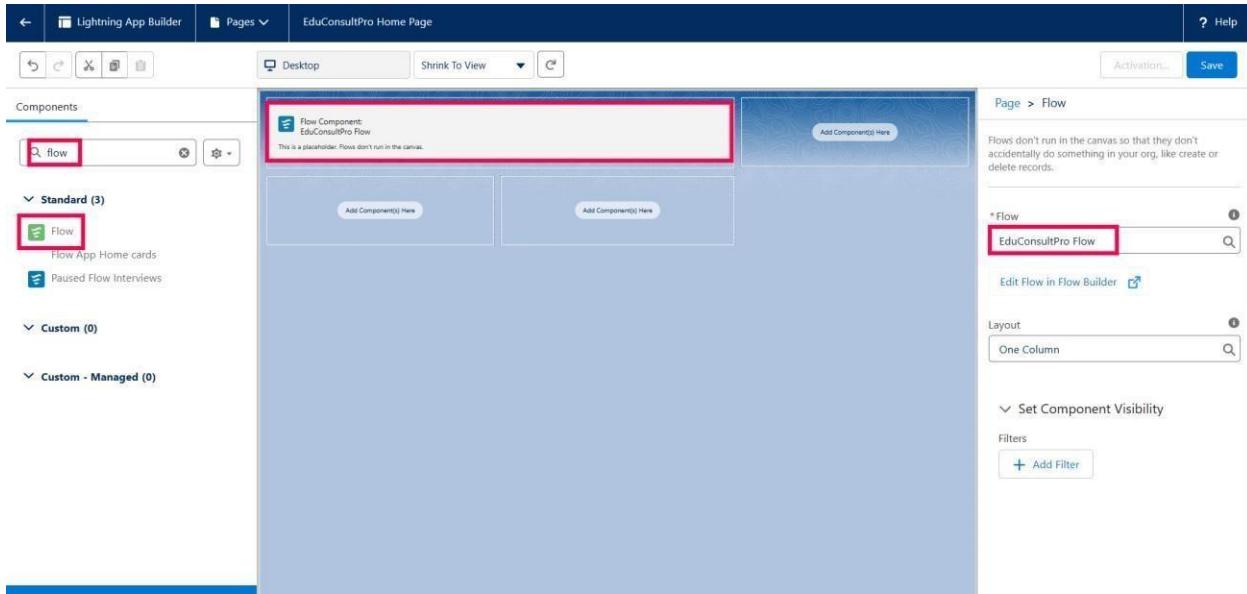
3. Configure the Home Page:

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

The screenshot shows the "CHOOSE PAGE TEMPLATE" step. On the left, under "STANDARD (7)", several templates are listed: Header and Three Regions, Home Template One Region (repeated three times), and Home page header two columns left side bar. The "Standard Home Page" template is highlighted with a red box. On the right, there's a preview of a desktop monitor showing a standard three-region home page layout. Below the preview, text reads: "Lightning Experience Home page template with a header above two equal-width regions, and a full-height sidebar." At the bottom, it says "Supported form factors: desktop." Navigation buttons "Back" and "Done" are at the bottom left and right respectively.

4. 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**”.



5. Save and Activate the Page:

- Click **Save**.
- Click **Activate**.

6. 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	
<input checked="" type="checkbox"/> Sales	Manage your sales process with accounts, leads, opportunities, and m...	
<input type="checkbox"/> 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 Selected
Profile	Description	
<input type="checkbox"/> Silver Partner User		
<input type="checkbox"/> Solution Manager		
<input type="checkbox"/> Standard Platform User		
<input type="checkbox"/> Standard User		
<input checked="" type="checkbox"/> 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](#)

