

# **A CRM APPLICATION TO MANAGE THE SERVICES OFFERED BY AN INSTITUTION**

By

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## **Project Abstract:**

EduConsultPro Institute, a premier educational institution, offers a wide range of courses and programs across various disciplines. With the increasing number of prospective students seeking admission each year, the institute faces significant challenges in efficiently managing the admission process, handling student inquiries, and providing expert consulting services. To overcome these challenges and ensure a streamlined experience, EduConsultPro Institute has implemented a comprehensive Salesforce CRM solution.

This CRM application is designed to optimize the entire admission process, from the initial student inquiry to final enrollment. It provides a centralized platform for managing student inquiries, automating admission workflows, and facilitating effective case management. The solution includes a self-service student portal that allows prospective students to submit their applications, track their admission status, and access relevant resources.

For the admissions staff, the CRM application offers an intuitive admissions dashboard that provides real-time insights into the status of applications, enabling them to efficiently review, process, and manage admission requests. The system also supports the management of expert consulting services, allowing staff to schedule consultations, track interactions, and ensure timely follow-up with students.

**Keywords:** Salesforce CRM, Admissions Process, Student Inquiry Management, Case Management, Workflow Automation, Self-Service Student Portal, Real-Time Insights, EduConsultPro Institute.

## **Requirements:**

### **1. Admission Application Management:**

Prospective students should have access to the admission application form through the institute's website or portal. The admission application form should collect comprehensive information including personal details, academic history, and qualification. Submitted admission applications should be captured and stored in the Salesforce CRM system. Students should receive automated email notifications after successful submission of application. Admissions staff should be able to generate reports and dashboards to analyze application metrics, acceptance rates, and enrollment trends.

### **2. Approval Process Requirements:**

Implement an Approval process in Salesforce to review and approve Consulting Request. Set up email alerts to notify relevant students when he/she is approved or rejected. Ensure that request gets automatically submitted when it is created.

### **3. Consulting Services Management:**

Prospective students should be able to request consulting services through the institute's website or portal. The consulting request form should capture student details, consulting preferences, and areas of expertise required. Submitted consulting requests should be recorded in the Salesforce CRM system. Consultants and advisors should receive automated email notifications for new consulting requests. Consultants should be able to view, accept, and manage consulting requests within the Salesforce CRM interface. Consulting appointment scheduling should be facilitated within Salesforce, including date, time, and purpose of the appointment. Appointment status (e.g., scheduled, completed, canceled) should be tracked and updated in Salesforce.

### **4. Immigration Case Management:**

Students should be able to initiate immigration cases through the phone, email or web. The immigration case submission form should capture case details, and relevant information. Submitted immigration cases should be recorded and stored in the Salesforce CRM system. Immigration agents and case

managers should receive automated email notifications for new immigration cases. Immigration agents should be able to view, process, and track immigration cases within the Salesforce CRM interface. Case status (e.g., open, in progress, closed) should be tracked and updated in Salesforce. Document management and collaboration tools should be integrated to facilitate case processing and communication.

## **What you'll learn**

1. Real Time Salesforce Project
2. Object & Fields
3. Application Management
4. User Management
5. Approval Process
6. Flows

## **After Creating the Salesforce org Start with the First Milestone**

### **Milestone 1:- Create Objects from Spreadsheet.**

#### **Create Course object**

1. Go to your object manager and click on create object from spreadsheet
2. Click on the link to get the spreadsheet, Course.

3. After downloading, upload the file, map the fields and upload to create an object.

### **Create Remaining objects**

1. Follow the steps which we have followed for course object creation.

2. Use the following sheets for remaining objects.

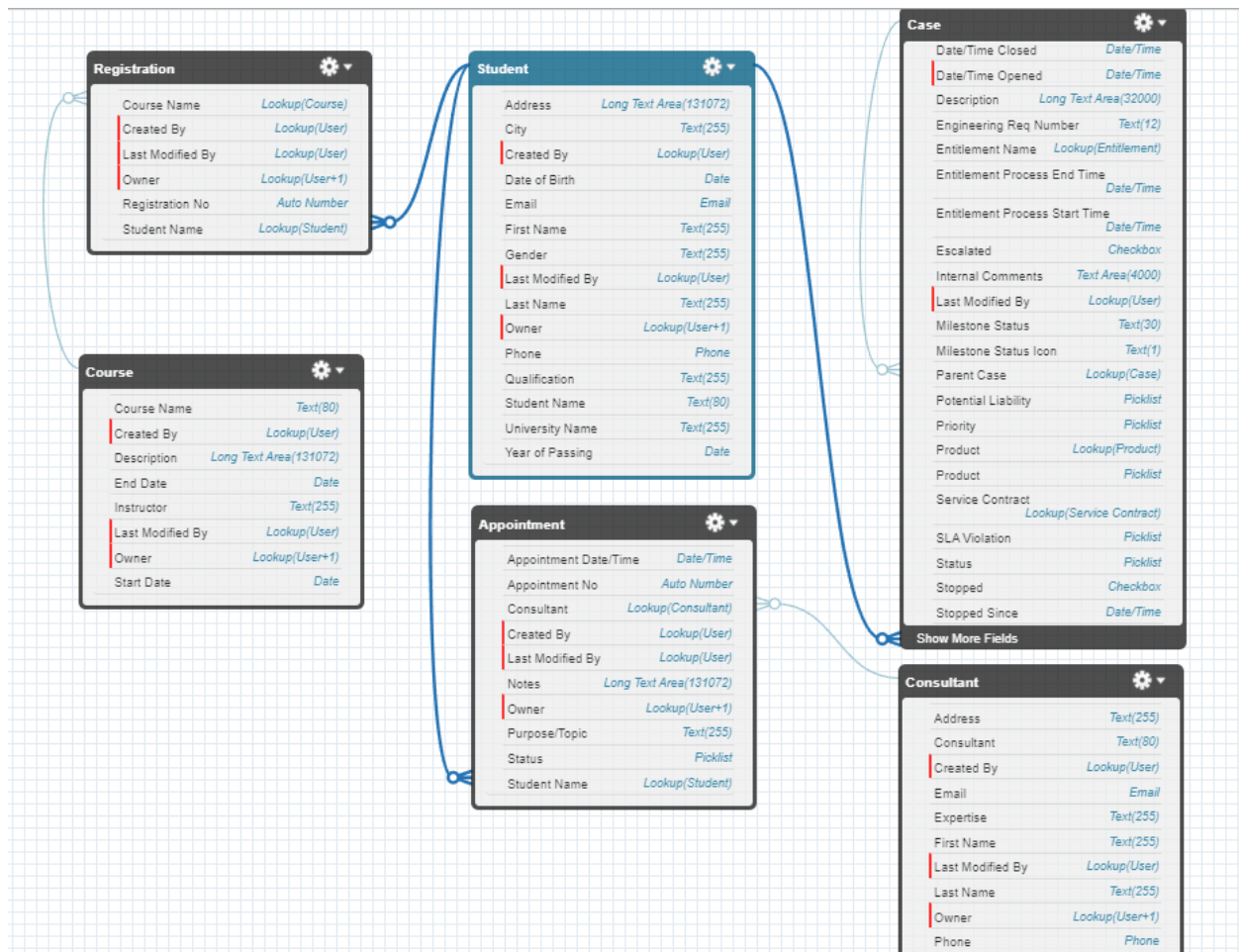
- a. Consultant

- b. Student

- c. Appointment

### **Create Relationship among the objects**

1. Create lookup between appointment and student, appointment and consultant.
2. Create an object to store the information student and course details with the name Registration.
3. Also create a lookup between student and case to store the student queries for immigration or visa application.
4. The data model should be similar to the below Data Model with field and relationships:



5. Create tabs for the respective object.

## Configure the Case Object

1. Go to object manager, edit case object.
2. Select the "Type" field and add the values in it.
  - Immigration
  - Visa Application
3. Now Select the "Status" field and add the values in it.
  - Open
  - In-progress

## Create a Lightning App

1. Go to Setup, search for the App Manager in quick find

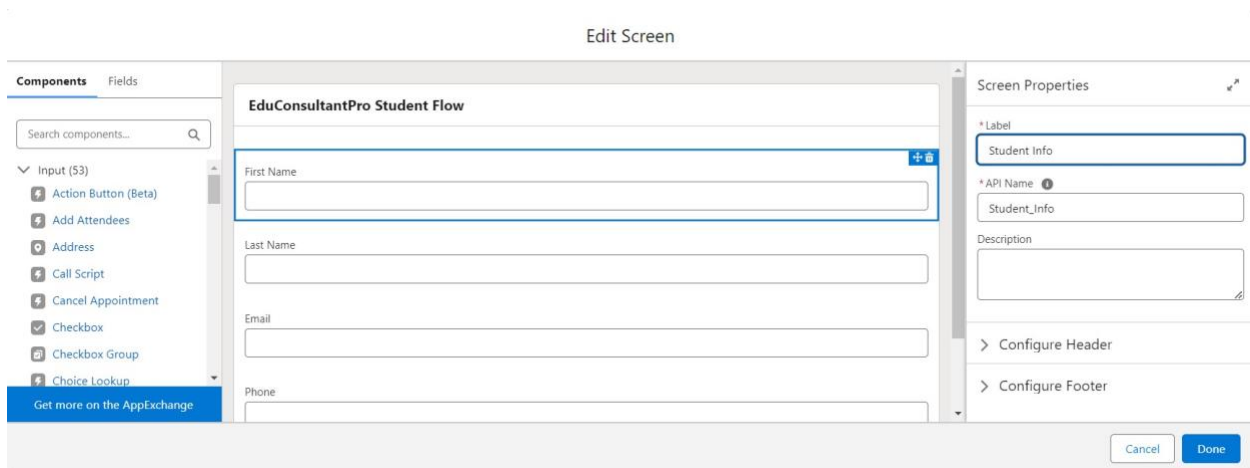


2. Click on New Lightning App
3. Give app name as “EduConsultPro”, click Next, Next, Next
4. Add Home, Students, Courses, Consultants, Appointments, Registrations, and Cases from the Available Items to Selected Items.
5. Add “System Administrator” profile from Available Profiles to Selected Profiles, click Save & Finish.

## Milestone 2:- Create a ScreenFlow for Student Admission Application process.

### Add Screen Element

1. From Setup, enter Flow Builder in quick find, select new flow --> ScreenFlow.
2. Add a Screen element.
3. In the Screen Properties pane, for Label, enter “Student Info”.
4. Click on Fields, click on the record variable input and create a new Resource(StudentRecordRes) to display all the fields which are in the student object. Drag all the fields which are needed to add on the screen inorder to collect the student information.



### Create Student Record using Create Element

1. Add a Create element after Student Info Screen Element, Label it as “Create Student Record.”
2. Select “one” under How many records to Create, and select “use all values from a record” under How to Set the record fields.
3. Select the record variable resource(StudentRecordRes) which we have created in the Student Info screen element, under Create a record from these values.

Create Records

\* 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

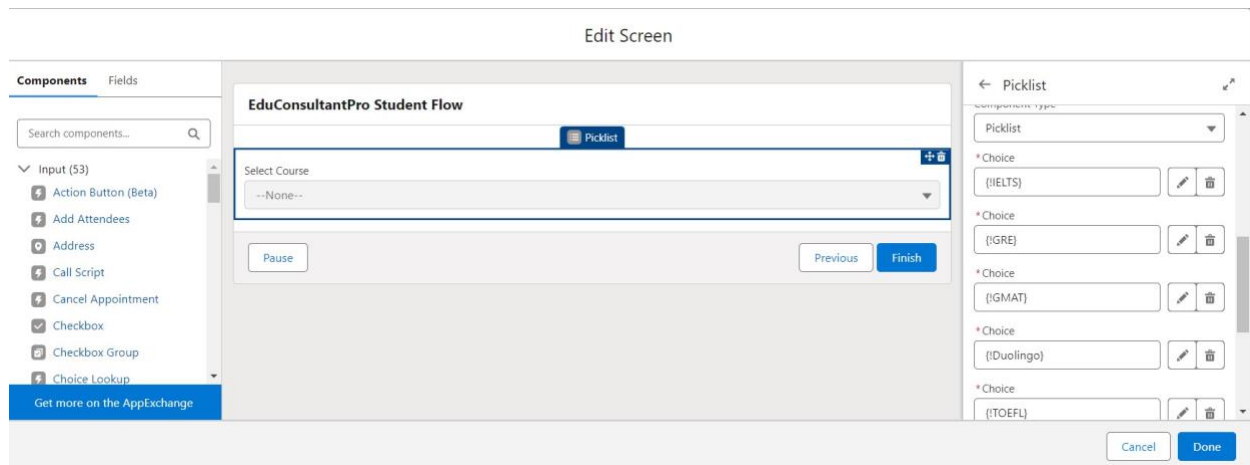
\* Record

StudentRecordRes X

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

## Add Screen Element

1. Add a Screen Element after Create Student Record Element and label it as Course Screen.
2. Add a picklist component from the left side panel label it as “Select Course”, under choices type “IELTS” and enter. This creates a variable with the name IELTS.
3. Repeat the same for GRE, GMAT, Duolingo, TOEFL.



## Add Decision Element

1. Add a Decision Element after Select Course Screen Element, label it as Selecting Course.
2. Under outcome label it as “Selected IELTS” and write the condition such as below:  
Resource : Select\_Course (Screen Component from Select Course Screen Element)  
Operator : Equals
3. Value : IELTS (Choice Variable from Select Course Screen Element)
4. Click on the “+” icon and Repeat step 2 for other options mentioned as below:
  - a. GRE
  - b. GMAT
  - c. DuoLingo
  - d. TOEFL
5. Click Done.

Decision
×

\* Label

Selecting Course

\* API Name ⓘ

SelectingCourse

Description

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


| OUTCOME ORDER ⓘ   | OUTCOME DETAILS  |   | Delete Outcome |
|-------------------|--|---|----------------|
| Selected IELTS    | * Label <div>SelectingCourse</div>   | * Outcome API Name ⓘ <div>SelectingCourse</div> |                |
| Selected GRE      | Condition Requirements to Execute Outcome <div>All Conditions Are Met (AND)</div>                      |   |                |
| Selected GMAT     | Resource <div>Course Screen &gt; Select_Course</div> Operator <div>Equals</div> Value <div>IELTS</div> |   |                |
| Selected Duolingo | <div>+ Add Condition</div>   |   |                |
| Selected TOEFL    |  |   |                |
| Default Outcome   |  |   |                |

## Add GET Record Element


1. Add a GET Record Element after Decision Element, under the IELTS path and label it as “Get IELTS Rec”.
2. Select “one” under How many records to Create, and select “Use separate resources, and literal values” under How to Set the record fields.
3. Select Object : Registration
  - a. Field : Course\_Name\_\_c

Value : {!Get\_IELTS\_Rec.Id}

- b. Field:Student\_Name\_\_c  
Value : {!StudentRecordRes.Id}


Get Records
×

\* Label

\* API Name 

Description


Get Records of This Object

\* Object

Filter Course Records

Condition Requirements

All Conditions Are Met (AND) ▼

| Field                                       | Operator                            | Value   |   |
|---|-------------------------------------|---|---|
| <input type="text" value="Course_Name__c"/> | <input type="text" value="Equals"/> | <input type="text" value="Aa Select_Course"/> |  |

+ Add Condition


Sort Course Records

Sort Order

- Repeat the steps 1 & 2 for the GRE, GMAT, TOEFL, DuoLingo paths.


### Create Registration Record using Create Records Element

- Add a Create element after the Get IELTS Rec element and label it as “Create IELTS Registration Rec”.
- Select “one” under How many records to Create, and select “Use separate resources, and literal values” under How to Set the record fields.
- Select Object : Registration
  - Field:Course\_Name\_\_c  
Value : {!Get\_IELTS\_Rec.Id}
  - Field:Student\_Name\_\_c  
Value : {!StudentRecordRes.


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_Name__c  | ← <div>Aa Course from Get_IELTS_Rec &gt; Record ID ✕</div> |   |
| Student_Name__c | ← <div>Aa StudentRecordRes &gt; Record ID ✕</div>          |  |

+ Add Field

- Repeat the steps 1 & 2 for the GRE, GMAT, TOEFL, DuoLingo paths.

### Create Email Text Template Variables For Email Body And Subject

- Click on the toggle toolbox on the left corner, click “New Resource”, then select “Text Template” as Resource Type.
- Give the API name as “StuRegistrationEmailTextTempBody”, select “view as plain text” and paste the below text in body.

“Dear {!StudentRecordRes.Name},

Congratulations and welcome to EduConsultantPro!

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

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

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

**Explore Our Resources :** Take some time to explore the wide range of resources, tools, and services available on the EduConsultantPro platform. From educational insights to immigration advice, we offer comprehensive support tailored to your needs.

**Connect with Our Consultants :** Our team of experienced consultants is here to assist you at every stage of your educational and immigration endeavors. Don't hesitate to reach out to us with any questions, concerns, or inquiries you may have. We're here to help!

**Stay Updated :** Keep an eye on your inbox for important updates, announcements, and exclusive opportunities from EduConsultantPro. We'll ensure that you're informed about the latest developments and relevant information to support your journey.

**Engage with the Community :** Join our vibrant community of students, professionals, and experts who share your passion for education and global opportunities. Connect with like-minded individuals, participate in discussions, and expand your network.

Once again, congratulations on taking this important step towards realizing your academic and career aspirations. We are thrilled to have you as part of the EduConsultantPro family and look forward to supporting you on your journey to success.

If you have any questions or need assistance, please don't hesitate to contact us.

Thankyou.”

3.Click Done.

## Edit Text Template

\* API Name ⓘ

StuRegistrationEmailTextTempSub

Description

\* Body ⓘ

Insert a resource... 🔍 View as Plain Text ▼

Dear {!StudentRecordRes.Name},

Congratulations and welcome to EduConsultantPro!

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

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

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

Explore Our Resources : Take some time to explore the wide range of resources, tools, and services available on the

Cancel Done

4. Repeat steps 1 & 2 to create an email text template for the email subject, label it as “StuRegistrationEmailTextTempSub”, write a text message in the body and save it.



## Edit Text Template

\* API Name ⓘ

StuRegistrationEmailTextTempSub

Description

\* Body ⓘ

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

Cancel Done


### Add an Action Element

1. Add an Action Element after all the Decision paths, label it as “Send Email to Student”.
2. Under “Set input values for selected action”, include body, Recipient Address List and Subject.
3. For input Body : {!StuRegistrationEmailTextTempBody},  
Recipient Address List : {!StudentRecordRes.Email\_\_c},  
Subject : {!StuRegistrationEmailTextTempSub}.


 Send Email


---

\* Label

\* API Name 

Description




**Send Email** 

emailSimple-emailSimple


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

### Set Input Values for the Selected Action

 Add Threading Token to Body


☐ Not Included



---

 Add Threading Token to Subject

☐ Not Included

---

A<sub>a</sub> Body 

 StuRegistrationEmailTextTempBody 

☒ Included

## Add Screen Element

1. Add a Screen Element after the Send Email to Student Action Element, label it as Success Screen.
2. From the left side panel search for the Display text component and drag it to the main panel, label it as "SuccessMessage".
3. Paste the below in the Resource picker box.
4. "Dear{!StudentRecordRes.Name},

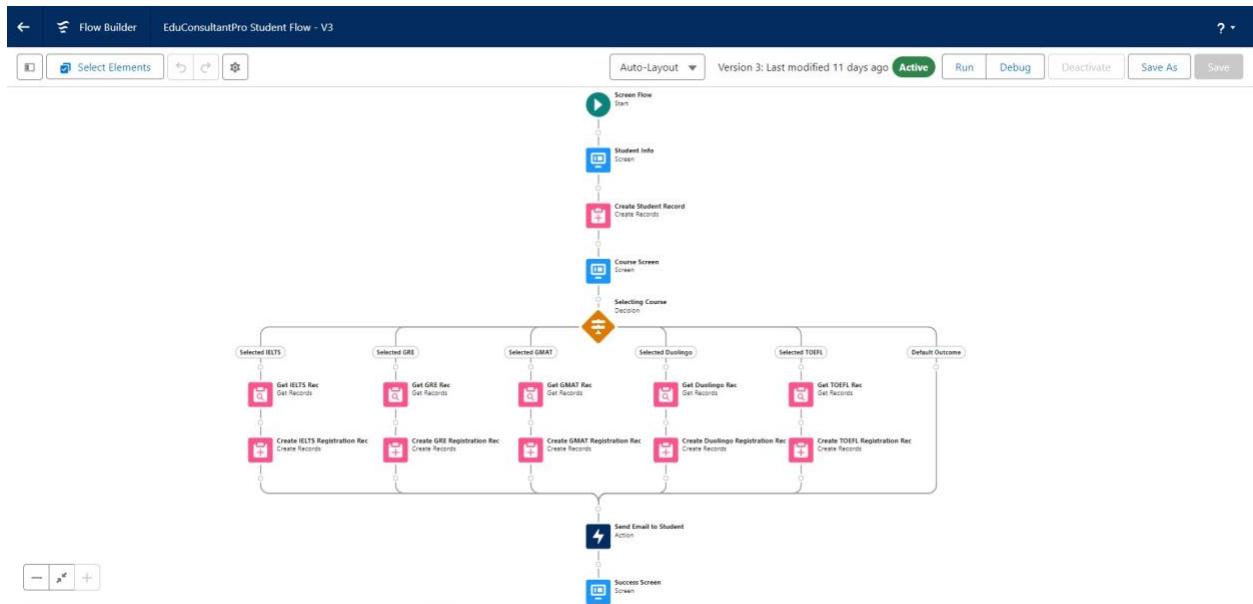
Congratulations and welcome to EduConsultantPro!

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.”

4. Click Done.
5. Save the flow and name it as “EduConsultPro Student Flow”. Your flow will look as shown below:



## Milestone 3:- Create Users

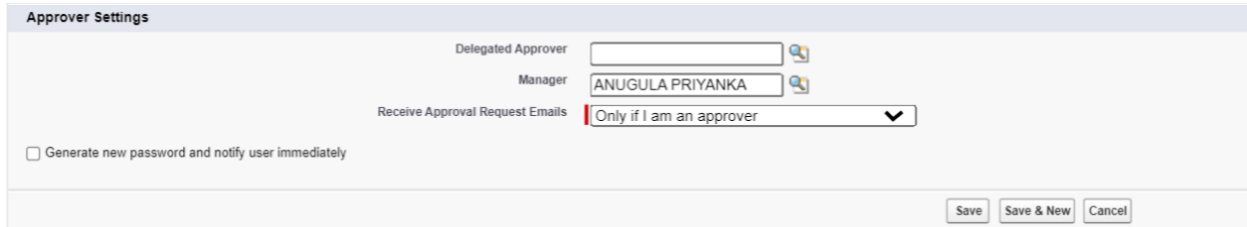
**Create a user with a Standard platform user profile.**

**User**

1. Go to Setup --> Administration --> Users --> New User
2. LastName : Consultant
3. License : Salesforce Platform
4. Profile : Standard Platform User
5. Fill all the mandatory fields & Save.

## Configure the User Settings

1. Go to Setup --> Administration --> Users --> click Edit next to your name
2. Scroll down to bottom, under Approver Settings, Select “Consultant” the Manager Field.
3. Click Save.

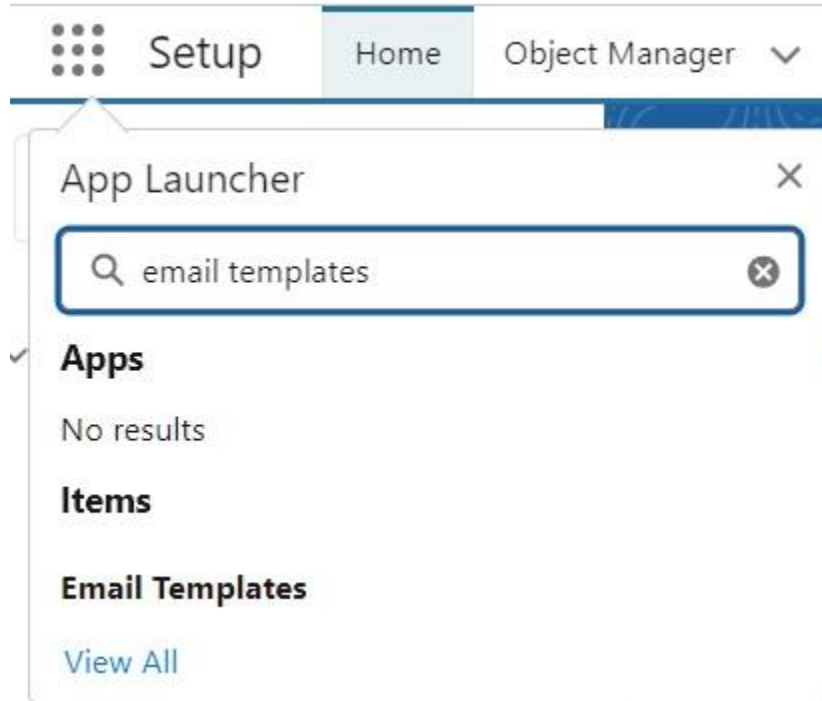


The screenshot shows the 'Approver Settings' form. It includes fields for 'Delegated Approver' and 'Manager' (set to 'ANUGULA PRIYANKA'). There is a dropdown for 'Receive Approval Request Emails' with the selected option 'Only if I am an approver'. A checkbox for 'Generate new password and notify user immediately' is present and unchecked. At the bottom right are buttons for 'Save', 'Save & New', and 'Cancel'.

## Milestone 4 :- Create an Approval Process for Property Object

### Create an Email Template

1. From Setup, enter Templates in the Quick Find box, and then select Lightning Email Templates, toggle on



2. go to app launcher, search for “Email Templates”, Create a new folder with the desired name.
3. Then create a new email template, select the folder which we have created in the previous steps, enter the below text in the HTML Value and Save it as "Submission Template".

"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 lead to positive outcomes and progress toward your goals.

If you have any questions or require further information before our scheduled appointment, please don't hesitate to reach out to me.

Looking forward to our meeting.

Best regards,

{{{Recipient.Name}}},

EduConsultantPro"

## Edit Submission Template

\* = Required Information

### Information

|  |   |
|--|---|
| *Email Template Name                             | Related Entity Type   |
| <input type="text" value="Submission Template"/> | <input type="text" value="Appointment"/>  |
| Description                                      | Folder  |
| <input type="text"/>                             | <input type="text" value="EduConsult Templates"/> <a href="#">Select Folder</a> |

### Message Content

|   |   |
|---|---|
| Subject   | Enhanced Letterhead   |
| <input type="text" value="Appointment Confirmation and Details"/> | <input type="text" value="Search Enhanced Letterheads..."/> |

HTML Value

Source

Font

Size

**B** *I* U A

Cancel

Save

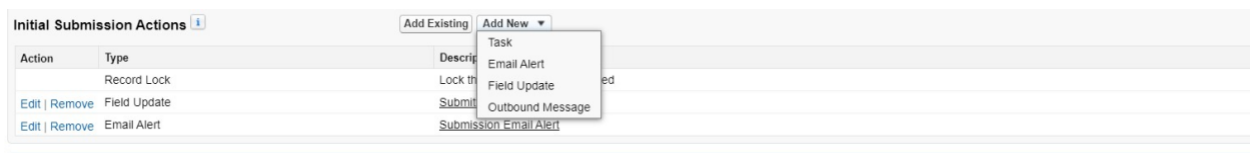
4. Create two more Email templates for Approval and Rejection of Request similar to the previous one.

## Create an Approval Process

1. From Setup, enter Approval in the Quick Find box, and then select Approval Processes.
2. In Manage Approval Processes For, select Appointment.
3. Click Create New Approval Process --> Use Jump Start Wizard.
4. Configure the approval process.
5. Process Name - Appointment Approval, Under Select Approver, Select Manager for the option : “Automatically assign an approver using a standard or custom hierarchy field.”
6. Click next and “Next Automated Approver Determined By” --> Select Manager.
7. From Record Editability Properties --> Click on Administrators OR the currently assigned approver can edit records during the approval process.
8. Save the approval process.
9. Click View Approval Process Detail Page.

10. Under Initial Submission Actions, click Add New --> Field Update, and configure it with these values.

| Field            | Value               |
|------------------|---------------------|
| Name             | Submitted           |
| Field to Update  | Appointment: Status |
| A Specific value | Pending             |



11.click Add New --> Email Alert, and configure it with these values.

Description : Submission Email Alert

Unique Name : Auto Populates

Email Template : Submission Template

Recipient Type : Select your Name

12. Repeat the Steps 10 - 11 for Final Approval and Final Rejection actions.

## Milestone 5 :- Create a Record Triggered Flow

### Configure the Start Element

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. The flow will look like this:

Configure Start

Select Object

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

\* Object

Appointment

Configure Trigger

\* Trigger the Flow When:

☒ A record is created

☐ A record is updated

☐ A record is created or updated

☐ A record is deleted

Set Entry Conditions

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

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

Condition Requirements

None

\* Optimize the Flow for:

**Fast Field Updates**

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

**Actions and Related Records**

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


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

## Add an Action Element

1. Add an Action element after the Start Element and Select the Submit for approval action, label it as "Approval SubFlow".



2. Set the RecordId to “{!\$Record.Id}”.

 Edit Submit for Approval  
approval subflow (*approval\_subflow*)

\* Label

approval subflow

\* API Name

approval\_subflow

Description

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

Set Input Values for the Selected Action

A<sub>a</sub> \* Record ID ⓘ

{!\$Record.Id}

A<sub>a</sub> Approval Process Name Or ID

☐ Don't Include

A<sub>a</sub> Next Approver IDs

☐ Don't Include

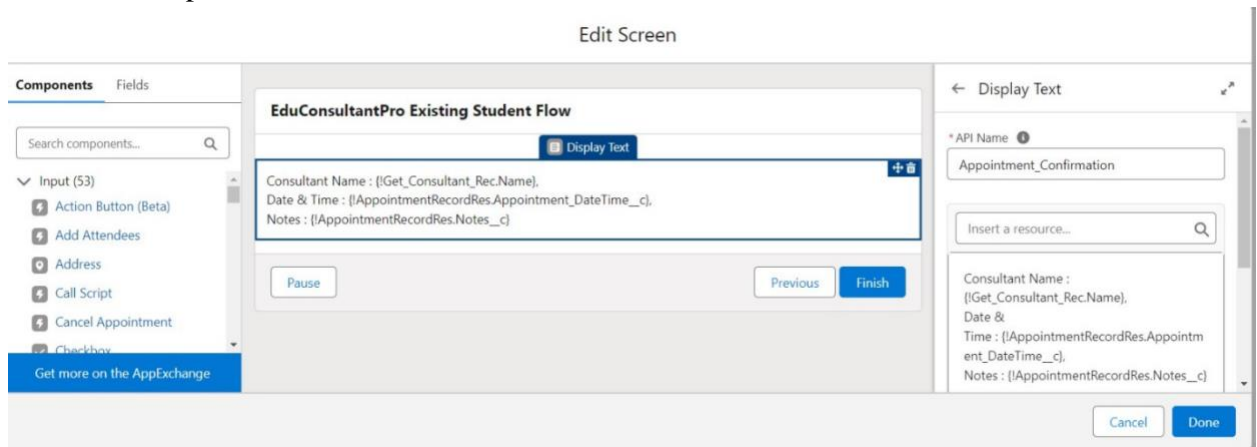
3. Save the Flow, label it as "EduConsultPro Approval Flow and Click on Activate.

## Milestone6:-Create a ScreenFlow for Existing Student to Book an Appointment

### Add Screen Element

1. From Setup, enter Flow Builder in quick find, 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. Give the Label’s as follows:  
1st Text Component Label : Enter Student Name  
2nd Text Component Label : Enter Student Email



5. Click on Done.

### Add GET Record Element

1. Add a GET Record Element after Decision Element, under the IELTS path and label it as “Get Rec”.
2. Select Object : Student  
Condition Requirement : All Conditions are Met(AND)
  - a. Field : Student Name  
Operator : Equals  
Value : { !Enter\_Student\_Name }
  - b. 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           | Operator | Value               |
|-----------------|----------|---------------------|
| Student_Name__c | Equals   | Enter_Student_Name  |
| AND Email__c    | Equals   | Enter_Student_Email |

+ Add Condition

Sort Student Records

Sort Order:

### Add Decision Element

1. Add a Decision Element after Select Display Student Details Element, label it as “Appointment or Case”.
2. Under outcome label it as “Appointment” and write the condition such as below:  
Resource : {!How\_may\_I\_Help\_you}  
Operator : Equals  
Value : {!Book\_an\_Appointment}
3. Click on the “+” icon and Repeat step 2 for Case options mentioned.

**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** +

**OUTCOME DETAILS** Delete Outcome

Appointment

\*Label: Appointment

\*Outcome API Name: Appointment

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

Resource: Aa ...Details > How\_may\_I\_Help\_you

Operator: Equals

Value: Aa Book\_an\_Appointment

+ Add Condition

4. Click Done.

## 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, click on the record variable input and create a new Resource (AppointmentRecordRes) to display all the fields which are in the Appointment object.
3. Drag all the fields which are needed to add on the screen inorder to collect the student information.

**Edit Screen**

**EduConsultantPro Existing Student Flow**

Appointment Date/Time

Purpose/Topic

Pause Previous Finish

**Screen Properties**

\*Label: Appointment Booking Screen

\*API Name: Appointment\_Booking\_Screen

Description:

> Configure Header

> Configure Footer

Cancel Done

**Components** Fields

Add record fields to your screen. More Info

\*Record Variable: AppointmentRecordRes

Search Appointment fields

Fields (8)

- Appointment Date/Time
- Appointment No
- Consultant
- Appointment
- Notes
- Purpose/Topic
- Status

4. Click on Done.

## Add GET Record Element

1. Add a GET Record Element after Decision Element, under the Appointment path and label it as “Get Consultant Rec”.
2. Select Object : Consultant  
Condition Requirement : All Conditions are Met(AND)
  - a. Field : Name  
Operator : Equals  
Value : {!AppointmentRecordRes.Consultant\_Name\_\_c}

The screenshot shows the 'Get Records' configuration window. The 'Label' field is set to 'Get Consultant Rec' and the 'API Name' is 'Get\_Constant\_Rec'. The 'Object' is set to 'Consultant'. Under 'Filter Consultant Records', the 'Condition Requirements' are set to 'All Conditions Are Met (AND)'. A single condition is added with 'Field' as 'Name', 'Operator' as 'Equals', and 'Value' as 'AppointmentRecordRes > Co...'. The 'Sort Consultant Records' section shows 'Sort Order' as 'Not Sorted'. At the bottom, 'How Many Records to Store' is set to 'Only the first record' and 'How to Store Record Data' is set to 'Automatically store all fields'.

## 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. Select “one” under How many records to Create, and select “Use separate resources, and literal values” under How to Set the record fields.
3. Select Object : Appointment
  - a. Field : Appointment\_DateTime\_\_c  
Value : {!AppointmentRecordRes.Appointment\_DateTime\_\_c}
  - b. Field : Consultant\_\_c  
Value : {!Get\_Constant\_Rec.Id}

- c. Field : Notes\_\_c  
Value : {!AppointmentRecordRes.Notes\_\_c}
- d. Field : PurposeTopic\_\_c  
Value : {!AppointmentRecordRes.PurposeTopic\_\_c}
- e. Field : Student\_Name\_\_c  
Value : {!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                   | Value  |
|-------------------------|--|
| Appointment_DateTime__c | AppointmentRecordRes > Appointment Date/...    |
| Consultant__c           | Consultant from Get_Consultant_Rec > Record... |
| Notes__c                | AppointmentRecordRes > Notes                   |
| PurposeTopic__c         | AppointmentRecordRes > Purpose/Topic           |
| Student__c              | Student from Get_Rec > Record ID               |

+ Add Field

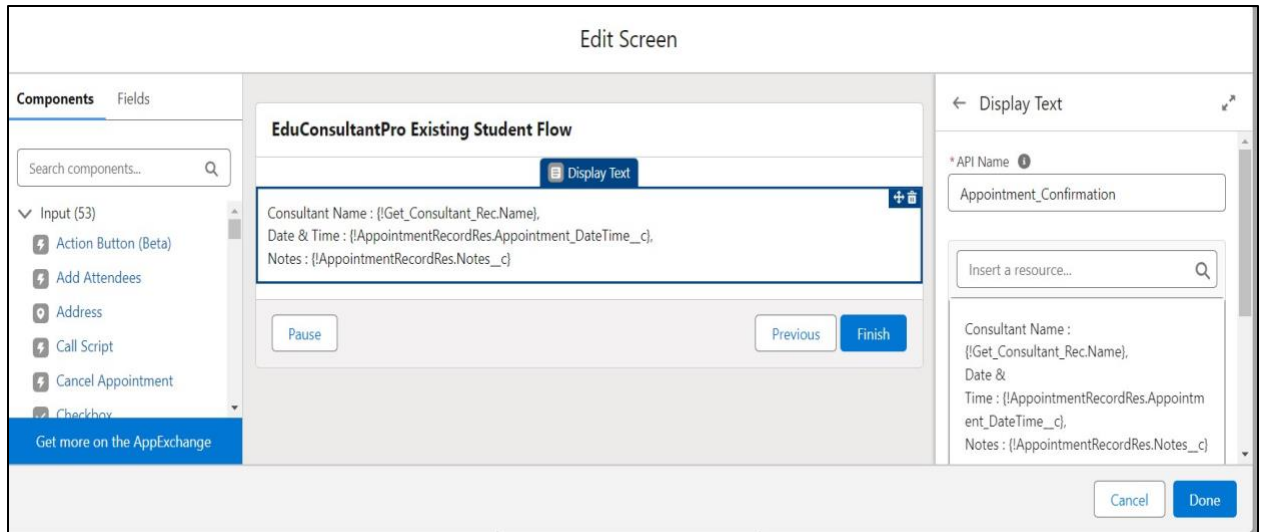
## Add Screen Element

1. Add a Screen Element after the Send Email to Student Action Element, 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 below in the Resource picker box.

Consultant Name : {!Get\_Consultant\_Rec.Name},

Date & Time : {!AppointmentRecordRes.Appointment\_DateTime\_\_c},

Notes : {!AppointmentRecordRes.Notes\_\_c},



4. Click Done.

### Add an SubFlow Element

1. Add a subflow element after the Decision Element, on the Case path and search and Select for “Create a Case”, label it as “Create Student Case”.
2. Save the flow and label it as “EduConsultantPro Existing Student Flow”, you can use the below image for reference.



## Create a Case



\* Label

Create Student Case

\* API Name 

Create\_Student\_Case

Description

### Referenced Flow



#### Create a Case

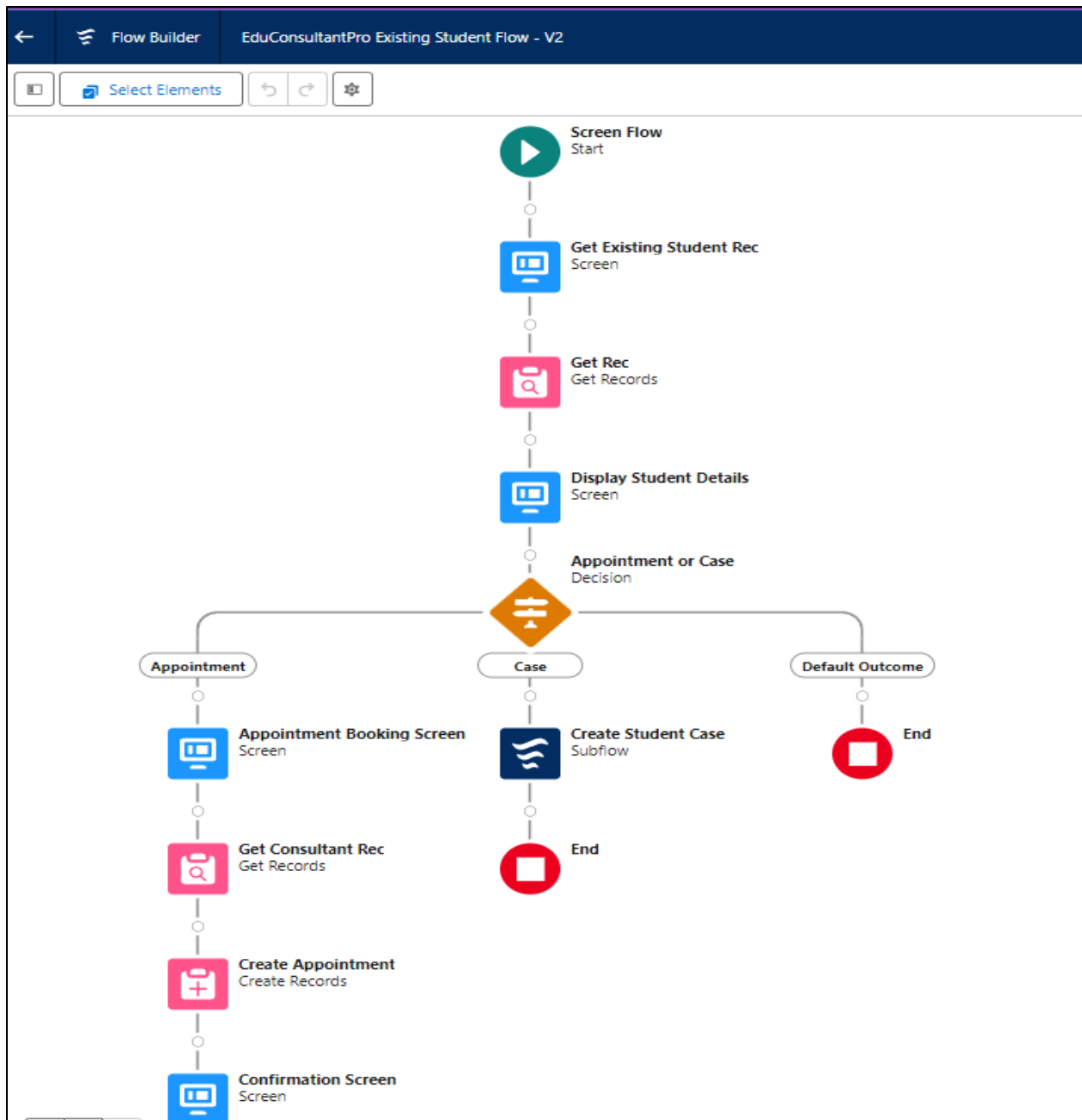
setup\_service\_experience\_\_Create\_Case



Use values from the parent flow to set the inputs for the "Create a Case" 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 "Create a Case" flow.







## Milestone 7:- Create a ScreenFlow to Combine all the flows at one place

### Add Screen Element

1. Add a Screen Element and label it as Welcome Screen.
2. From the left side panel search for the Display text component and drag it to the main panel, label it as "SuccessMessage".
3. Paste the below in 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.

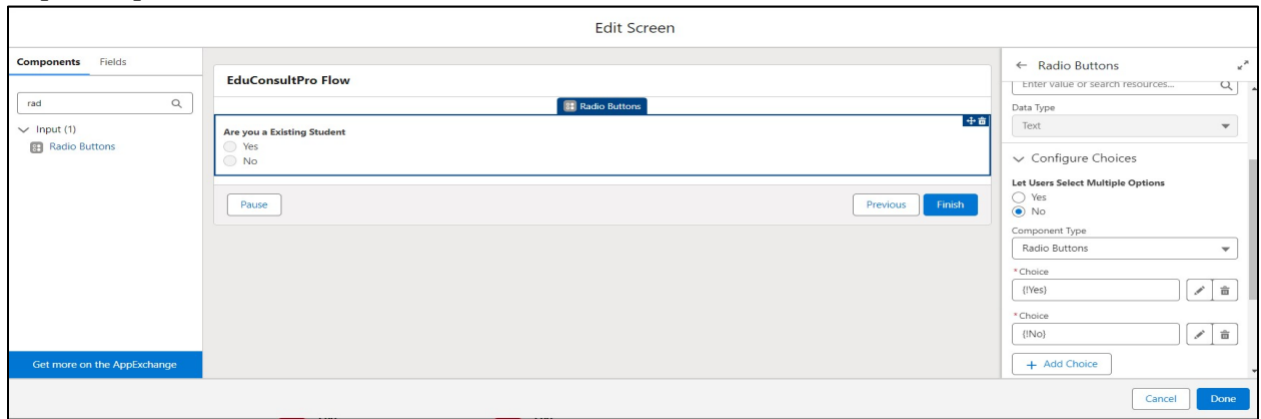
Welcome to EduConsultantPro – where your aspirations meet our expertise, and together, we pave the path to success. Let's embark on this transformative journey together!”

1. Click Done.

### **Add Screen Element**

1. Add a Screen Element after the Welcome Screen Element, label it as “Existing or New Student Confirmation Screen”.
2. Add a radio button component from the left side panel,  
label : Are you a Existing Student
3. Click on Add Choice --> type “Yes” in the input field --> click Create Yes choice.


- Repeat step 6 and create an “No” choice resource.



- Click Done.

### Add Decision Element

- Add a Decision Element after Existing or New Student Confirmation Screen Element, label it as “Decision 1”.
- Under outcome label it as “If Existing Student” and write the condition such as below:  
Resource : {!Are\_you\_a\_Existing\_Student}  
Operator : Equals  
Value : {!Yes}
- Click on the “+” icon and Repeat step 2 for No options mentioned.


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 ⓘ +

⋮ If Existing Student

⋮ If Not Existing user

Default Outcome

OUTCOME DETAILS

Delete Outcome

\* Label

If Existing Student

\* Outcome API Name ⓘ

If\_Existing\_Student

Condition Requirements to Execute Outcome

All Conditions Are Met (AND) ▼

Resource

Aa ... > Are\_you\_a\_Existing\_Student ✕

Operator

Equals ▼

Value

Aa Yes ✕


✕

+ Add Condition

## Add an SubFlow Element

1. Add a subflow element after the Decision 1 Element on the if Existing Student path and search and Select for “EduConsultantPro Existing Student Flow ”, label it as “Existing Student Flow”.

2. Save the flow and label it as “EduConsultantPro Existing Student Flow”.


 EduConsultantPro Existing Student Flow

\* Label

\* API Name ⓘ

Description

Referenced Flow

 **EduConsultantPro Existing Student Flow**  
EduConsultantPro\_Existing\_Student\_Flow

▼

1. Click Done.

### Add an SubFlow Element

1. Add a subflow element after the Decision 1 Element on the if Not an Existing Student path and search and Select for “EduConsultantPro Student Flow ”, label it as “New Student Flow”.
2. save the flow and label it as “EduConsultantPro Existing Student Flow”.

## EduConsultantPro Student Flow

\* Label

New Student Flow

\* API Name 

New\_Student\_Flow

Description

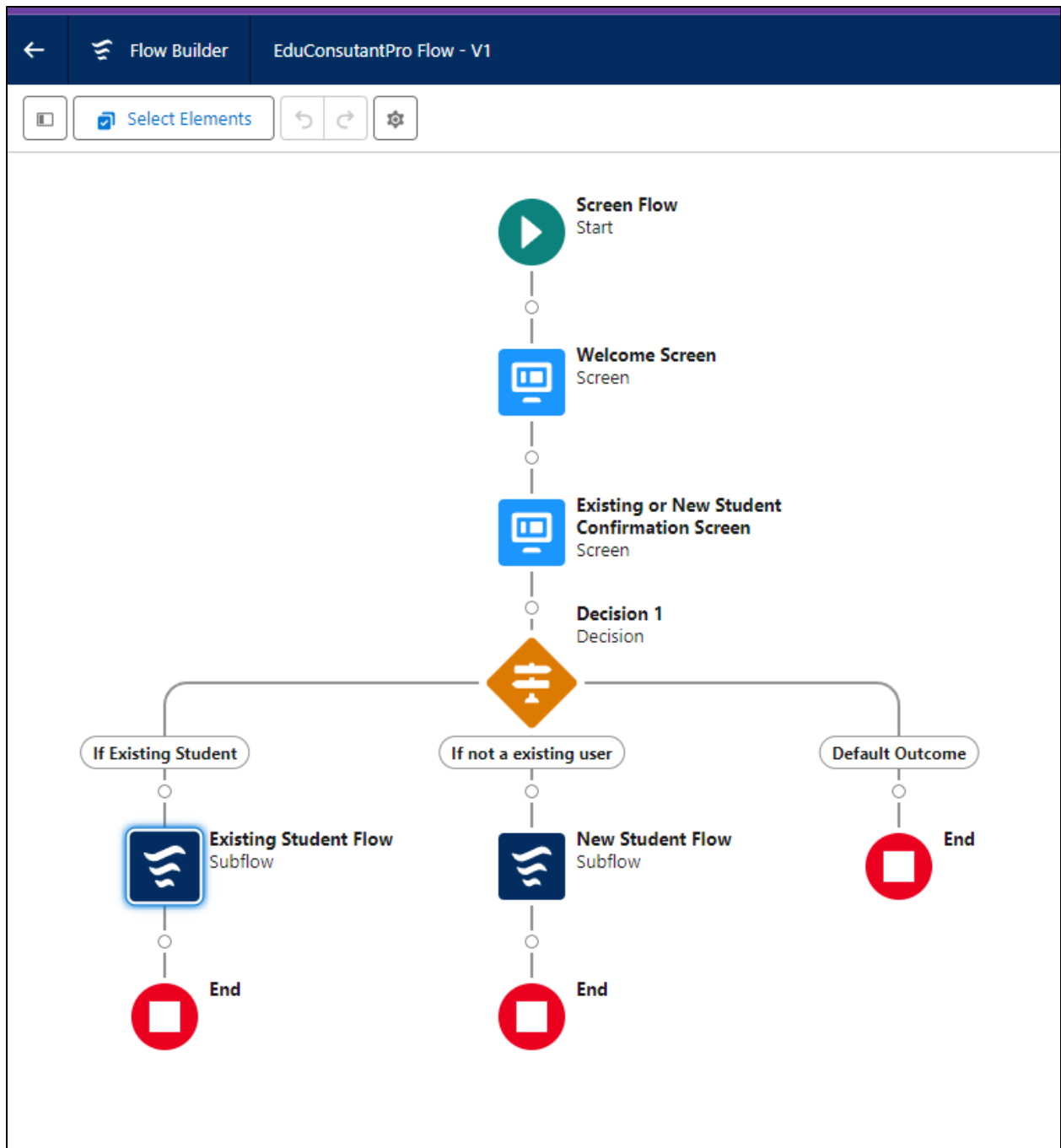
Referenced Flow



**EduConsultantPro Student Flow**  
EduConsultantPro\_Student\_Flow



3. Click Done.
4. Save the flow and label it as “EduConsultPro Flow”, you can use the below image for reference.

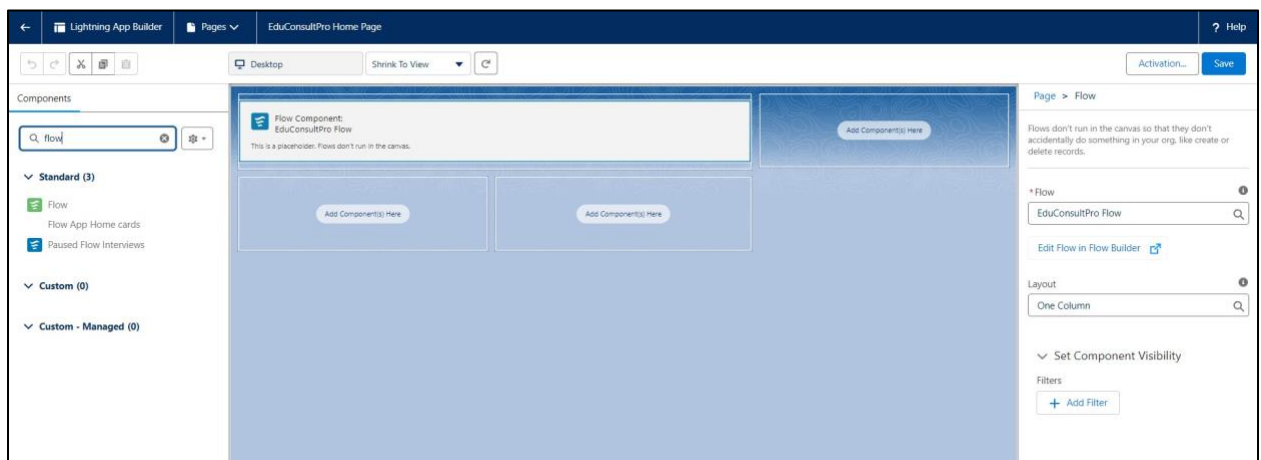


## Milestone 8:- Create a lightning app page

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

### Create a lightning app page

1. From Setup, enter App Builder in the Quick Find box, then click Lightning App Builder.
2. Click New, select Home Page, then click Next.
3. Step through the wizard and name the page “EduConsultPro Home Page”, select the Standard Home Page template, and then click Done.
4. Drag the Flow component to the top-right region.
5. Search for the “EduConsultantPro Flow” and click Save.



1. Click Activate, Click App and Profile, then click Assign to Apps and Profiles.
2. Select the Sales app, then click Next.
3. Scroll down the list of profiles and select System Administrator, then click Next.
4. Review the assignment, and then click Save.



## **Conclusion:**

Implementing Salesforce CRM at EduConsultPro Institute has changed the institution's ability to effectively manage admissions, student inquiries, and counseling services. By introducing streamlined processes and automation, the CRM reduced administrative burdens, allowing admissions staff to focus on high-value tasks. Prospective students benefit from a transparent, user-friendly experience, with a self-service approach that facilitates access to application status and resources. Enable productivity, ensure onboarding process smooth and effective. Overall, this solution not only increases efficiency and student satisfaction but also places EduConsultPro in a highly competitive educational environment for continuous improvement and change. The CRM implementation meets the organization's current requirements, while providing a flexible foundation for future expansion and innovation.