A CRM Application to Manage the Services Offered by an Institution

Description: A CRM application designed for an institution like EduConsultPro Institute is intended to optimize the management of essential services such as admissions, student inquiries, and consulting requests. As the volume of prospective students grows, the manual handling of these processes becomes increasingly inefficient and susceptible to errors. This CRM system serves as a centralized hub for capturing, storing, and managing all student-related information, enabling the institution to automate application workflows, monitor inquiries, and manage consulting services efficiently. By automating key activities such as application processing, communication follow-ups, and scheduling of appointments, the CRM enhances the overall experience for both students and staff. Furthermore, it supports the meticulous handling of immigration cases, ensuring each interaction is managed with accuracy and care. Ultimately, this CRM solution allows EduConsultPro to prioritize delivering high-quality education while ensuring that administrative operations are streamlined, responsive, and centered around student needs. Creating objects directly from a spreadsheet in Salesforce offers an efficient way to manage data. This step-by-step guide for creating a Course object using this method can be used to develop a project document.

Create Course Object

Step 1: Access Salesforce

1. **Log In:** Start by logging into your Salesforce account.
2. **Navigate to Setup:** Click on the gear icon in the top-right corner to access the Setup menu.

Step 2: Access Object Manager

1. **Open Object Manager:** On the Setup page, locate the Object Manager tab at the top of the screen and click it.
2. **Create New Object:** Click the "Create" button and select "Create Object from Spreadsheet."

Step 3: Download the Spreadsheet

1. **Get the Spreadsheet:** Click on the provided link to download the Course object spreadsheet.
2. **Save the File:** Save the spreadsheet to a convenient location on your local machine.

Step 4: Upload the Spreadsheet

1. **Upload File:** In the "Create Object from Spreadsheet" window, click on "Upload Your File."
2. **Select Spreadsheet:** Find the Course spreadsheet where you saved it and select it to upload.

Step 5: Map Fields

1. **Automatic Mapping:** Salesforce will automatically attempt to map the fields from the spreadsheet to the object fields.

2. **Review Mappings:** Carefully review the field mappings to ensure they match the columns in your spreadsheet.
3. **Adjust if Needed:** If necessary, adjust any incorrect mappings by using the dropdown menus to select the correct field.

Step 6: Create the Object

1. **Proceed to Next Step:** After verifying the mappings, click "Next."
2. **Final Review:** Review the object details and field mappings once more to ensure accuracy.
3. **Finish Creation:** Click "Create" to finalize the process.

Step 7: Verify the New Object

1. **Return to Object Manager:** After the object is created, go back to the Object Manager.
2. **Search for Course Object:** Look for the new Course object in the list and click on it to review its fields, relationships, and other settings.

Step 8: Test the Object

1. **Access Courses:** Go to the App Launcher (grid icon in the top-left corner) and search for "Courses."
2. **Create Test Record:** Create a new Course record to ensure that everything is functioning as expected.

Create Remaining Objects

Step 1: Access Salesforce

1. **Log In:** Begin by logging into your Salesforce account.
2. **Go to Setup:** Click the gear icon in the top-right corner to access the Setup menu.

Step 2: Access Object Manager

1. **Open Object Manager:** On the Setup page, locate and click on the Object Manager tab at the top of the page.
2. **Create New Object:** Select the "Create" button and choose "Create Object from Spreadsheet."

Step 3: Download the Spreadsheet

1. **Download Required Spreadsheet:** Click on the provided links to download the spreadsheets for the objects you need to create:
    - Consultant Spreadsheet
    - Student Spreadsheet
    - Appointment Spreadsheet
2. **Save the Files:** Save each spreadsheet to a location on your local machine.

Step 4: Upload the Spreadsheet

1. **Upload the File:** In the "Create Object from Spreadsheet" window, click on "Upload Your File."
2. **Select Spreadsheet:** Navigate to where you saved the required spreadsheet and select it to upload.

Step 5: Map Fields

1. **Automatic Field Mapping:** Salesforce will automatically attempt to map the spreadsheet fields to the object fields.
2. **Review Mappings:** Carefully review the field mappings to ensure they correspond correctly with the columns in your spreadsheet.
3. **Adjust as Needed:** If necessary, adjust any incorrect mappings by selecting the appropriate field from the dropdown menus.

Step 6: Create the Object

1. **Proceed to Next Step:** After verifying the mappings, click "Next."
2. **Final Review:** Conduct a final review of the object details and field mappings.
3. **Complete Creation:** Click "Create" to finalize the creation of the object.

Step 7: Verify the New Object

1. **Return to Object Manager:** Once the object is created, go back to the Object Manager.
2. **Search for the Object:** Look for the newly created Consultant, Student, or Appointment object, and click on it to review the fields, relationships, and other settings.

Step 8: Test the Object

1. **Access the Object:** Open the App Launcher (grid icon in the top-left corner) and search for the object you created.
2. **Create a Test Record:** Create a new record for the object to ensure everything is working correctly.

Create Relationships Among the Objects

Task 1: Creating Lookup Relationships

1. **Create Lookup Relationship Between Appointment and Student**
    1. **Access Salesforce:**
        i. Log in to your Salesforce account.
        ii. Navigate to Setup by clicking the gear icon in the top-right corner.
    2. **Navigate to Object Manager:**
        i. Click on the Object Manager tab.
        ii. Find and select the Appointment object.
    3. **Add Lookup Relationship:**
        i. In the Appointment object, go to the Fields & Relationships section.
        ii. Click "New" to add a new field.
        iii. Select "Lookup Relationship" as the data type and click "Next."
        iv. Choose "Student" from the Related To dropdown menu.
        v. Click "Next," configure the relationship settings, and click "Save."
2. **Create Lookup Relationship Between Appointment and Consultant**
    1. **Navigate to Object Manager:**
        i. If not already in the Appointment object, search for and select it.
    2. **Add Lookup Relationship:**

i. In the Fields & Relationships section, click "New" to create a new field.
ii. Choose "Lookup Relationship" as the data type and click "Next."
iii. Select "Consultant" from the Related To dropdown menu.
iv. Click "Next," configure the relationship settings, and click "Save."

3. **Create Lookup Relationship Between Student and Case**
    1. **Navigate to Object Manager:**
        i. Search for and select the Student object.
    2. **Add Lookup Relationship:**
        i. In the Fields & Relationships section, click "New" to add a new field.
        ii. Choose "Lookup Relationship" as the data type and click "Next."
        iii. Select "Case" from the Related To dropdown menu.
        iv. Click "Next," configure the relationship settings, and click "Save."

Task 2: Creating the Registration Object

1. **Create the Registration Object**
    1. **Navigate to Object Manager:**
        i. Go to Setup and click on the Object Manager tab.
        ii. Click "Create" and select "Custom Object."
    2. **Define Object Details:**
        i. Enter "Registration" in the Label field.
        ii. The Plural Label will auto-populate as "Registrations."
        iii. Provide an Object Name (API name), such as "Registration."
        iv. Choose Auto Number or Text for Record Name as preferred.
        v. Click "Save."
2. **Add Fields to the Registration Object**
    1. **Add Lookup Relationship to Student:**
        i. Within the Registration object, go to the Fields & Relationships section.
        ii. Click "New," select "Lookup Relationship," and click "Next."
        iii. Choose "Student" from the Related To dropdown menu.
        iv. Click "Next," configure the relationship settings, and click "Save."
    2. **Add Lookup Relationship to Course:**
        i. Follow similar steps as above, but select "Course" from the Related To dropdown.
        ii. Click "Next," configure the settings, and click "Save."
    3. **Add Additional Fields:**
        i. Click "New" to create other fields as needed (e.g., Registration Date, Status).
        ii. Select the appropriate data types, configure settings, and click "Save" after each field.

Configure the Case Object

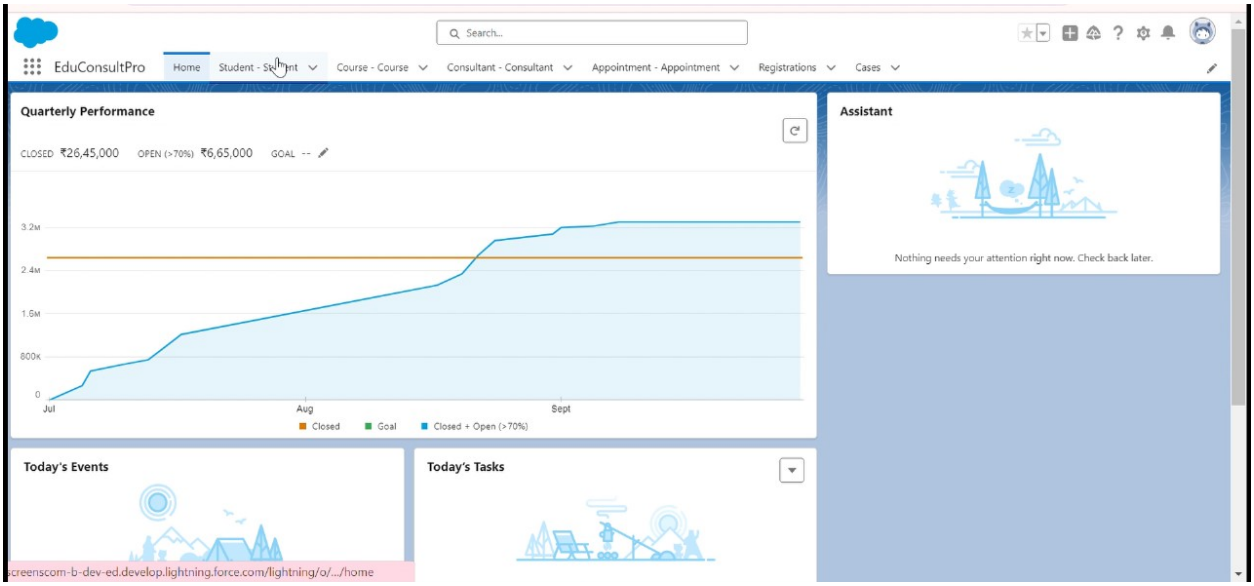
1. **Log In to Salesforce**
    - **Access:** Log in to your Salesforce account using credentials with the necessary permissions to modify object settings.
2. **Access Object Manager**
    - **Navigate:** From the Salesforce home page, click the "App Launcher" (grid icon) located in the top-left corner.
    - **Search for Object Manager:** Type "Object Manager" into the search bar and select it from the results.
3. **Locate the Case Object**
    - **Find the Object:** In the Object Manager, either search for "Case" or scroll through the list of objects to locate it.
    - **Open Settings:** Click on "Case" to access its settings.
4. **Edit the Case Object Fields**
    - **Go to Fields & Relationships:** Within the Case object settings, click on the "Fields & Relationships" tab on the left side.
5. **Configure the "Type" Field**
    - **Locate the Field:** Scroll through the list or use the search function to find the "Type" field.
    - **Modify Values:** Click on "Type" to view the field settings. Click "New" to add additional picklist values.
    - **Add Values:** Enter "Immigration" and "Visa Application" as new options. Click "Save" after adding each new value.
6. **Configure the "Status" Field**
    - **Find the Field:** Return to the "Fields & Relationships" tab and locate the "Status" field.
    - **Add New Values:** Click on "Status," then click "New" to introduce new picklist values.
    - **Enter Values:** Add "Open" and "In-progress" as new values. Click "Save" after each addition.
7. **Verify the Changes**
    - **Check Updates:** After saving the new values, verify their inclusion by returning to the "Case" object and reviewing the picklist options for "Type" and "Status."
8. **Update Page Layouts (if needed)**
    - **Access Layouts:** If the new values should be visible on specific page layouts, go to the "Page Layouts" section under the Case object settings.
    - **Edit Layouts:** Adjust the relevant page layouts to ensure the "Type" and "Status" fields are displayed as needed.
9. **Test the Configuration**

- **Create or Edit Case:** Test the new configuration by creating a new case or editing an existing one to confirm that the new picklist values appear and function correctly.

Create a Lightning App

1. **Log In to Salesforce**
   - **Access:** Log in to your Salesforce account with administrative permissions.
2. **Open App Manager**
   - **Navigate:** Click on the "Gear" icon in the top-right corner to open the Setup menu.
   - **Find App Manager:** In the Quick Find box on the left, enter "App Manager" and select "App Manager" from the search results.
3. **Create a New Lightning App**
   - **Initiate Creation:** In the App Manager, click on the "New Lightning App" button.
4. **Enter Basic App Information**
   - **App Name:** Type "EduConsultPro" into the App Name field.
   - **Plural Name:** This will be auto-filled based on the app name you provided.
   - **Description:** Optionally, add a description for the app.
   - **Proceed:** Click "Next."
5. **Configure App Branding**
   - **Branding Options:** You can customize the app by selecting a logo and choosing a color scheme. If branding changes are not needed, you can skip this step.
   - **Continue:** Click "Next."
6. **Set Up App Navigation**
   - **Select Navigation Items:**
     - **Add Tabs:** From the "Available Items" section, locate and select the following tabs: Home, Students, Courses, Consultants, Appointments, Registrations, and Cases.
     - **Add to Navigation:** Move these tabs to the "Selected Items" list by clicking the right arrow button.
   - **Proceed:** Click "Next."
7. **Configure App Visibility**
   - **Profile Access:**
     - **Select Profiles:** Locate the "System Administrator" profile in the list and move it to the "Selected Profiles" list.
   - **Finalize:** Click "Save & Finish."
8. **Verify and Access Your New App**
   - **Check App Manager:** After saving, you should find EduConsultPro in the App Manager list.

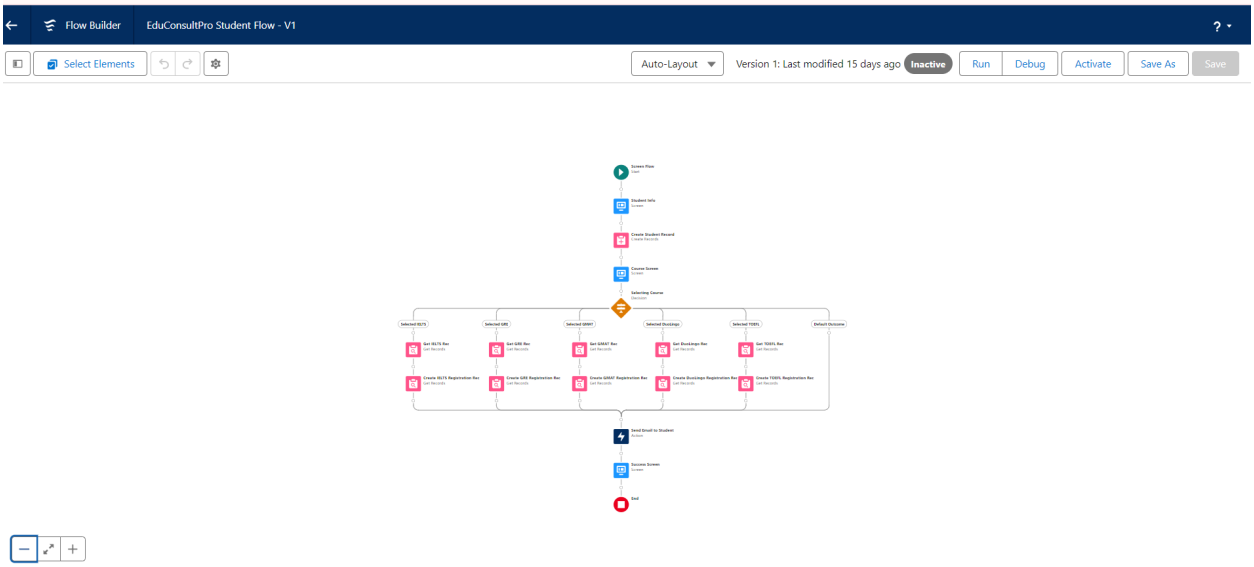
- **Test the App:** Click the "App Launcher" (grid icon) and select EduConsultPro to open and test the new app.



Create a Screen Flow for Student Admission Application

1. **Log In to Salesforce**
    - **Access:** Log in to your Salesforce account with the required permissions to create and manage Flows.
2. **Open Flow Builder**
    - **Navigate to Setup:** Click on the "Gear" icon in the top-right corner to access the Setup menu.
    - **Search for Flow Builder:** In the Quick Find box, type "Flow Builder" and select "Flow Builder" from the results.
3. **Start a New Flow**
    - **Create Flow:** In Flow Builder, click "New Flow."
    - **Choose Flow Type:** Select "Screen Flow" and click "Create."
4. **Add a Screen Element**
    - **Drag Screen Element:** In the Flow Builder canvas, locate the "Screen" element in the "Elements" tab on the left and drag it onto the canvas.
5. **Configure the Screen Element**
    - **Set Label:** In the properties pane on the right, set the Label to "Student Info."
    - **API Name:** The API Name will auto-fill based on the label but can be customized if needed.
6. **Create a New Resource for Student Object**
    - **New Resource:** Click "New Resource."
        - **Resource Type:** Choose "Variable."
        - **API Name:** Enter "StudentRecordRes."
        - **Data Type:** Select "Record."
        - **Object:** Choose "Student" (or the relevant object for student information).
        - **Allow Input:** Check "Available for input" if you want this variable to be passed into the flow.
        - **Click Done:** Save the new resource.
7. **Add Fields to the Screen**
    - **Select Fields:** With "StudentRecordRes" selected, the fields from the Student object will appear in the "Fields" pane.
    - **Drag Fields:** Drag and drop the necessary fields onto the screen element in the canvas. For instance, include fields like Name, Email, and Phone Number.
8. **Save and Activate the Flow**
    - **Save:** Click "Save" to store your work. Provide a name and description for the flow if prompted.
    - **Activate:** To make the flow operational, click "Activate."
9. **Test the Flow**
    - **Run Flow:** After activation, test the flow to ensure the "Student Info" screen

displays correctly and allows for student information entry.



Create a Screen Flow for Student Admission Application

1. Open Flow Builder

1. **Log In to Salesforce**
   - Ensure you are logged in with permissions to modify Flows.
2. **Navigate to Flow Builder**
   - Click the "Gear" icon in the top-right corner.
   - In the Quick Find box, type "Flow Builder" and select it.

2. Add a Create Record Element

1. **Open Existing Flow**
   - If not already open, locate and open your existing flow in Flow Builder.
2. **Drag Create Records Element**
   - From the "Elements" tab on the left, drag the "Create Records" element onto the canvas, placing it after the “Student Info” Screen element.
3. **Configure Create Records Element**
   - **Label:** Enter "Create Student Record."
   - **How Many Records to Create:** Select "One" to create a single record.
   - **How to Set the Record Fields:** Choose "Use all values from a record."
   - **Record Variable:** Select "StudentRecordRes" from the dropdown list.
4. **Define Object to Create**
   - **Object:** Choose "Student" (or the relevant object).

3. Add Course Screen Element

1. **Drag Screen Element**
    - Drag the "Screen" element onto the canvas after the “Create Student Record” element.
    - **Label:** Enter "Course Screen."
2. **Add Picklist Component**
    - **Drag Picklist Component:** Add a "Picklist" component to the screen.
    - **Label:** Enter "Select Course."
    - **Choices:**
        - Add choices for "IELTS," "GRE," "GMAT," "Duolingo," and "TOEFL."

4. Add Decision Element

1. **Drag Decision Element**
    - Drag the "Decision" element onto the canvas after the “Course Screen” element.
    - **Label:** Enter "Selecting Course."
2. **Configure Decision Outcomes**
    - **Add Outcomes:** Configure outcomes for each course choice.
        - **Example:**
            - Outcome Name: "Selected IELTS"
            - **Resource:** Select "Select_Course."
            - **Operator:** Equals
            - **Value:** IELTS
        - Repeat for other course options.

5. Create Registration Records

1. **Drag Create Records Element**
    - Drag the "Create Records" element onto the canvas after the decision outcomes.
    - **Label:** Enter "Create Registration Record."
2. **Configure Create Records Element**
    - **How Many Records to Create:** Select "One."
    - **How to Set the Record Fields:** Choose "Use separate resources, and literal values."
    - **Object:** Select "Registration."
3. **Set Field Values**
    - **Field:** Course_Name__c
        - **Value:** Use the relevant value for the course.
    - **Field:** Student_Name__c

        - **Value:** {!StudentRecordRes.Id}
    - **Repeat:** Create additional elements for each course choice with appropriate labels.

6. Create Email Text Templates

1. **Create Email Body Template**
    - **New Resource:** Click "New Resource."
    - **Resource Type:** Choose "Text Template."
    - **API Name:** Enter "StuRegistrationEmailTextTempBody."
    - **Format:** Select "View as plain text."
    - **Body:** Enter the provided email body text.
2. **Create Email Subject Template**
    - **Repeat:** Follow similar steps to create another text template for the subject.
    - **API Name:** Enter "StuRegistrationEmailTextTempSub."
    - **Body:** Enter the email subject text.

7. Add Action Element for Sending Email

1. **Drag Action Element**
    - Drag the "Action" element onto the canvas after all decision paths.
    - **Label:** Enter "Send Email to Student."
2. **Configure Action**
    - **Action Type:** Choose "Send Email."
    - **Set Input Values:**
        - **Body:** {!StuRegistrationEmailTextTempBody}
        - **Recipient Address List:** {!StudentRecordRes.Email__c}
        - **Subject:** {!StuRegistrationEmailTextTempSub}

8. Add Success Screen Element

1. **Drag Screen Element**
    - Drag the "Screen" element onto the canvas after the “Send Email to Student” action.
    - **Label:** Enter "Success Screen."
2. **Add Display Text Component**
    - **Drag Display Text Component:** Add a "Display Text" component to the screen.
    - **Label:** Enter "SuccessMessage."
    - **Text:** Paste the provided success message text.

9. Finalize and Save the Flow

1. **Connect the Elements**
    - **Connections:**
        - Student Info Screen ➔ Create Student Record
        - Create Student Record ➔ Course Screen
        - Course Screen ➔ Selecting Course (Decision)
        - Decision Outcomes ➔ Create Records elements
        - Create Records elements ➔ Send Email to Student
        - Send Email to Student ➔ Success Screen
2. **Save and Activate the Flow**
    - **Save:** Click "Save." Enter "EduConsultPro Student Flow" as the name.
    - **Activate:** Click "Activate" to make the flow available for use.

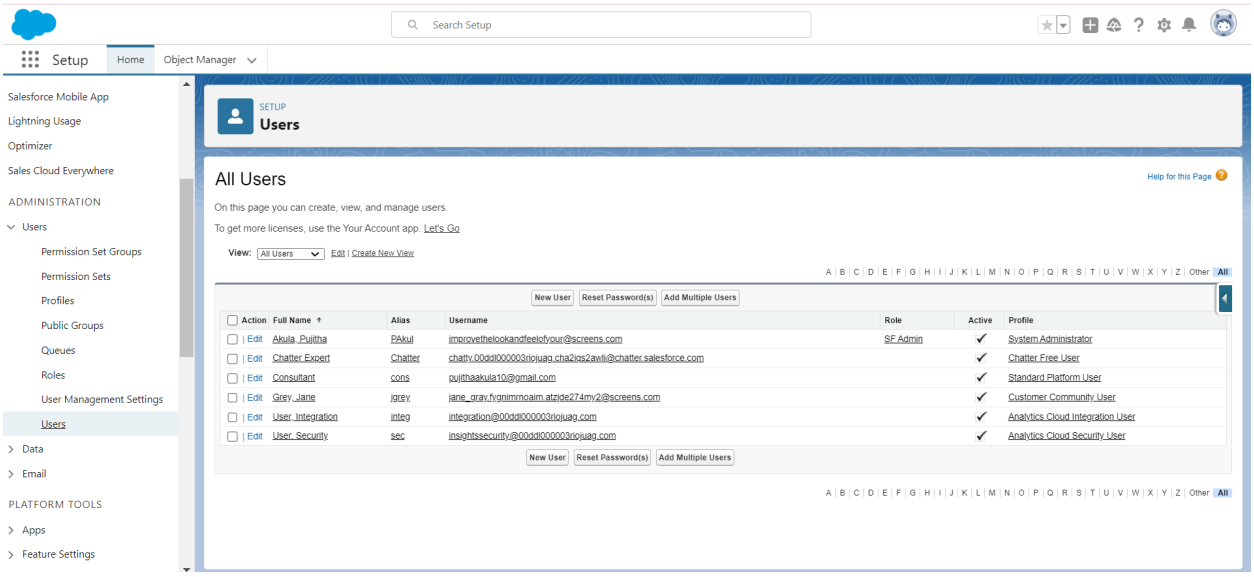
Create Users in Salesforce

1. Create a User with Standard Platform User Profile

1. **Log In to Salesforce**
    - Log in to your Salesforce account with administrative privileges.
2. **Navigate to User Creation**
    - Click the "Gear" icon in the top-right corner to access the Setup menu.
    - In the Quick Find box, type "Users" and select "Users" from the dropdown.
3. **Create a New User**
    - Click the "New User" button.
4. **Fill in User Details**
    - **Last Name:** Enter "Consultant."
    - **License:** Select "Salesforce Platform" from the dropdown list.
    - **Profile:** Choose "Standard Platform User" from the dropdown list.
    - **Mandatory Fields:**
        - Complete all required fields, including First Name, Username, Email, Alias, Role, User License, and Profile.
        - Ensure the Username is unique (typically in the format of an email address).
5. **Save the User**
    - Click "Save" to create the user.

2. Configure the User Settings

1. **Navigate to User Settings**
    - In the Setup menu, click on "Users" to access the user list.
    - Find the newly created user (Consultant) and click "Edit" next to their name.
2. **Update Approver Settings**
    - Scroll to the "Approver Settings" section.
    - In the "Manager" field, select "Consultant" from the dropdown list. (Make sure "Consultant" is an existing user assigned to the desired role.)
3. **Save the Changes**
    - Click "Save" to apply the changes to the user’s settings.



Create an Approval Process for the Property Object

1. Enable Lightning Email Templates

1. **Navigate to Email Templates Settings**
    - Go to Setup.
    - In the Quick Find box, type "Templates" and select "Lightning Email Templates."
    - Ensure the feature is toggled on.

2. Create a Folder for Email Templates

1. **Open App Launcher**
    - Click the App Launcher (grid icon) in the top-left corner.
    - Search for and select "Email Templates."

2. **Create a New Folder**
    - Click "New Folder."
    - Enter a name for the folder (e.g., "Property Email Templates").
    - Click "Save."

3. Create the Submission Template

1. **Open Email Templates**
    - Within the Email Templates app, click "New Email Template."
2. **Configure the Email Template**
    - **Folder:** Select the folder you created (e.g., "Property Email Templates").
    - **Email Template Name:** Enter "Submission Template."
    - **Subject:** Enter a relevant subject (e.g., "Property Submission Confirmation").
    - **HTML Value:** Customize the content as needed.
3. **Save the Template**

4. Create Approval and Rejection Templates

1. **Create the Approval Template**
    - Click "New Email Template" again.
    - **Email Template Name:** Enter "Approval Template."
    - **HTML Value:** Customize the message to confirm the approval of the property request.
    - **Save the Template.**
2. **Create the Rejection Template**
    - Click "New Email Template" once more.
    - **Email Template Name:** Enter "Rejection Template."
    - **HTML Value:** Customize the message to notify the user of the rejection.
    - **Save the Template.**

5. Create an Approval Process

1. **Navigate to Approval Processes**
    - Go to Setup.
    - In the Quick Find box, type "Approval Processes" and select it.
2. **Create a New Approval Process**
    - **Manage Approval Processes For:** Select "Property."
    - Click "Create New Approval Process."
    - Choose "Use Jump Start Wizard" and click "Next."
3. **Configure the Approval Process**
    - **Process Name:** Enter "Property Approval."

- **Select Approver:** Choose "Manager" for the option “Automatically assign an approver using a standard or custom hierarchy field.”

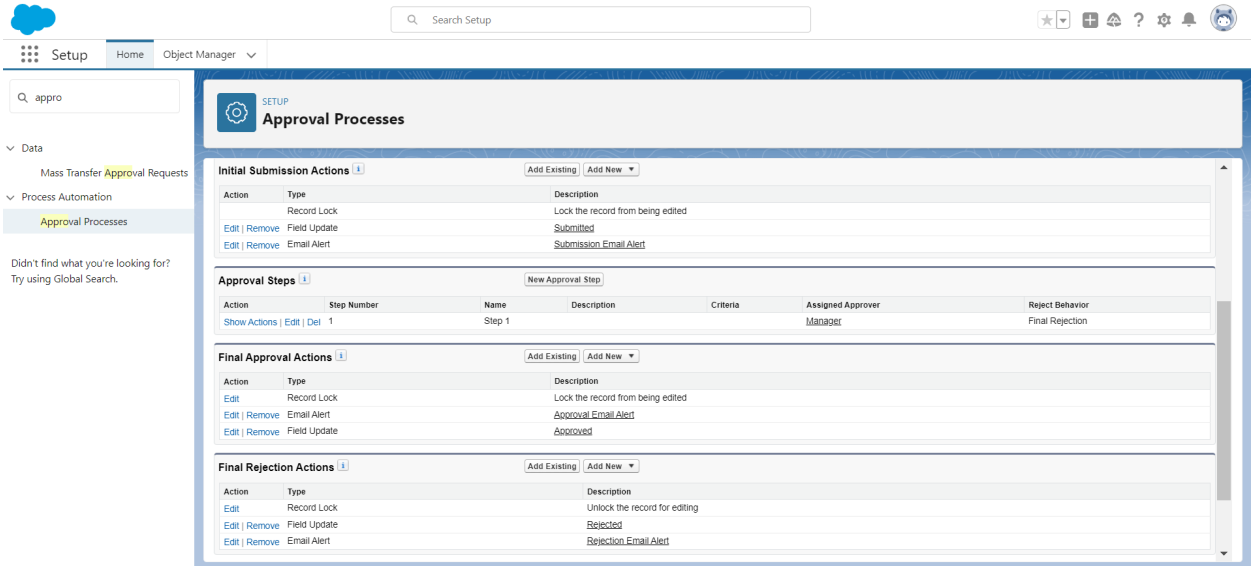
4. **Set Approver Settings**
   - **Automated Approver Determined By:** Select "Manager."
5. **Record Editability Properties**
   - Choose "Administrators OR the currently assigned approver can edit records during the approval process."
6. **Save the Approval Process**
   - Click "Save" to create the process.

6. Configure Initial Submission Actions

1. **View Approval Process Detail Page**
   - Click on "View Approval Process Detail Page."
2. **Initial Submission Actions**
   - **Add New:** Click "Field Update" and configure it (set specific field update values based on your requirements).
   - **Add New:** Click "Email Alert."
     - **Description:** Enter "Submission Email Alert."
     - **Email Template:** Choose "Submission Template."
     - **Recipient Type:** Select the desired recipient type (e.g., "Select your Name").

7. Configure Final Approval and Rejection Actions

1. **Final Approval Actions**
   - **Add New:** Click "Email Alert."
     - **Description:** Enter "Approval Email Alert."
     - **Email Template:** Choose "Approval Template."
     - **Recipient Type:** Select the appropriate recipient type.
2. **Final Rejection Actions**
   - **Add New:** Click "Email Alert."
     - **Description:** Enter "Rejection Email Alert."
     - **Email Template:** Choose "Rejection Template."
     - **Recipient Type:** Select the appropriate recipient type.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Create a Record-Triggered Flow

1. Configure the Start Element

1. **Log In to Salesforce**
   - Log in with administrative permissions.
2. **Navigate to Flow Setup**
   - Click on the "Gear" icon in the top-right corner to open the Setup menu.
   - In the Quick Find box, type "Flows" and select "Flows" from the dropdown list.
3. **Create a New Flow**
   - Click "New Flow."
   - Choose "Record-Triggered Flow" from the available flow types.
   - Click "Create" to open the Configure Start window.
4. **Configure the Start Element**
   - **Object:** Select "Appointment" from the dropdown. This sets the flow to be triggered by changes to Appointment records.
   - **Trigger the Flow When:** Choose "A record is created" to trigger the flow when a new Appointment record is created.
5. The flow should now be configured to start when a new Appointment record is created.

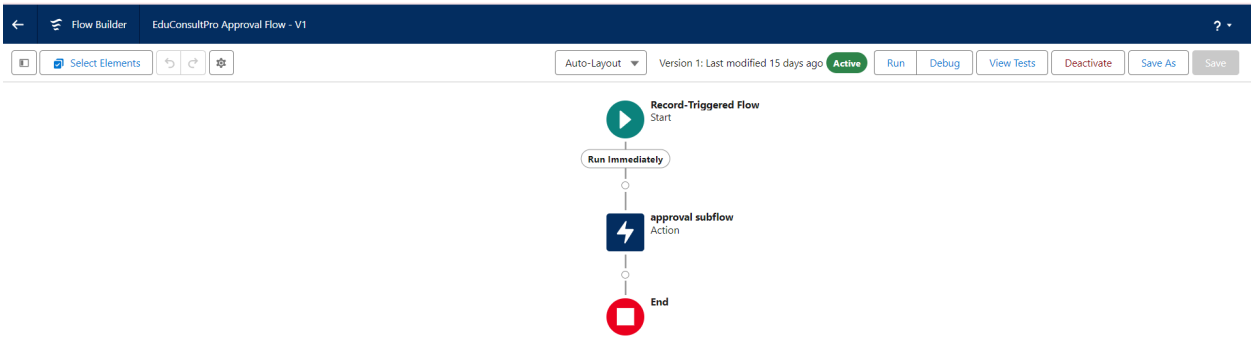
2. Add an Action Element

1. **Add the Action Element**
   - Drag the "Action" element from the left panel onto the flow canvas, placing it after the Start element.
2. **Configure the Action Element**
   - **Label:** Enter "Approval SubFlow."
   - **Action Type:** Select "Submit for Approval" from the list.
3. **Set the Record ID**
   - **Record ID:** Enter {!$Record.Id}. This binds the action to the ID of the record that triggered the flow, ensuring it submits the correct record for approval.

3. Save and Activate the Flow

1. **Save the Flow**
   - Click "Save" in the top-right corner of the Flow Builder.
   - **Flow Name:** Enter "EduConsultPro Approval Flow."
   - Add a description if needed for clarity.
   - Click "Save" to save your changes.
2. **Activate the Flow**

- Click "Activate" to make the flow live. This ensures the flow will trigger when a new Appointment record is created.



Create a Screen Flow for Existing Student to Book an Appointment

1. Create a New Screen Flow

1. **Log In to Salesforce**
   - Log in with administrative privileges.
2. **Navigate to Flow Builder**
   - Go to Setup.
   - In the Quick Find box, type "Flow Builder" and select it.
   - Click "New Flow."
   - Select "Screen Flow" and click "Create."

2. Add a Screen Element to Get Student Info

1. **Add Screen Element**
   - Drag a "Screen" element from the left panel onto the flow canvas.
2. **Configure Screen Properties**
   - **Label:** Enter "Get Student Info."
3. **Add Text Components**
   - Drag and drop "Text" components from the left panel to the screen element.
   - **First Text Component:**
     - **Label:** Enter "Enter Student Name."
   - **Second Text Component:**

        - **Label:** Enter "Enter Student Email."
4. **Save the Screen Element**
    - Click "Done" to save the screen element.

3. Add Get Records Element to Retrieve Student Record

1. **Add Get Records Element**
    - Drag a "Get Records" element from the left panel onto the canvas, placing it after the "Get Student Info" screen.
2. **Configure Get Records**
    - **Object:** Select "Student."
    - **Condition Requirements:** Select "All Conditions are Met (AND)."
    - **Field Conditions:**
        - **Field:** Student Name
        - **Operator:** Equals
        - **Value:** {!Enter_Student_Name}
        - **Field:** Email__c
        - **Operator:** Equals
        - **Value:** {!Enter_Student_Email}
3. **Save the Get Records Element**
    - Click "Done."

4. Add Decision Element for Appointment or Case

1. **Add Decision Element**
    - Drag a "Decision" element from the left panel onto the canvas, placing it after the "Get Records" element.
2. **Configure Decision Outcomes**
    - **Outcome Label:** Enter "Appointment."
    - **Condition:**
        - **Resource:** {!How_may_I_Help_you}
        - **Operator:** Equals
        - **Value:** {!Book_an_Appointment}
    - Click the "+" icon to add additional outcomes for "Case."
3. **Save the Decision Element**
    - Click "Done."

5. Add Screen Element for Appointment Booking

1. **Add Screen Element**
    - Drag a "Screen" element from the left panel onto the canvas, placing it on the

Appointment path.

2. **Add Fields**
    - **Label:** Enter "Appointment Booking Screen."
    - **Fields:**
        - Click on "Fields" and create a new resource named "AppointmentRecordRes" to display fields from the Appointment object.
        - Drag the necessary fields from the Appointment object to the screen to collect information.
3. **Save the Screen Element**
    - Click "Done."

6. Add Get Records Element to Retrieve Consultant Record

1. **Add Get Records Element**
    - Drag a "Get Records" element from the left panel onto the canvas, placing it after the "Appointment Booking Screen."
2. **Configure Get Records**
    - **Object:** Select "Consultant."
    - **Condition Requirements:** Select "All Conditions are Met (AND)."
    - **Field Conditions:**
        - **Field:** Name
        - **Operator:** Equals
        - **Value:** {!AppointmentRecordRes.Consultant_Name__c}
3. **Save the Get Records Element**
    - Click "Done."

7. Add Create Records Element for Appointment

1. **Add Create Records Element**
    - Drag a "Create Records" element from the left panel onto the canvas, placing it after the "Get Consultant Record" element.
2. **Configure Create Records**
    - **How Many Records to Create:** Select "One."
    - **How to Set the Record Fields:** Select "Use separate resources, and literal values."
    - **Object:** Select "Appointment."
    - **Field Updates:**
        - **Appointment_DateTime__c:** {!AppointmentRecordRes.Appointment_DateTime__c}
        - **Consultant__c:** {!Get_Consultant_Rec.Id}
        - **Notes__c:** {!AppointmentRecordRes.Notes__c}

        - **PurposeTopic__c:** {!AppointmentRecordRes.PurposeTopic__c}
        - **Student_Name__c:** {!Get_Rec.Id}
3. **Save the Create Records Element**
    - Click "Done."

8. Add Confirmation Screen

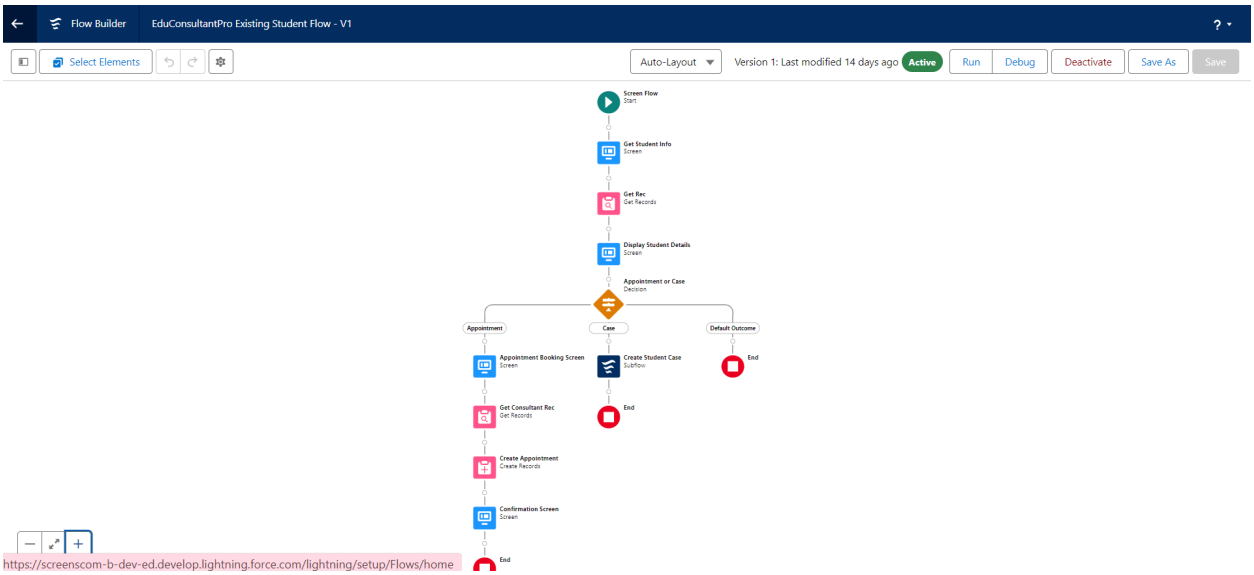
1. **Add Screen Element**
    - Drag a "Screen" element from the left panel onto the canvas, placing it after the "Create Appointment" element.
2. **Add Display Text Component**
    - **Label:** Enter "Appointment_Confirmation."
    - **Configure Display Text:** Paste the confirmation message text into the resource picker box.
3. **Save the Screen Element**
    - Click "Done."

9. Add Subflow Element

1. **Add Subflow Element**
    - Drag a "Subflow" element from the left panel onto the canvas, placing it after the Decision Element on the Case path.
2. **Configure Subflow**
    - **Label:** Enter "Create Student Case."
    - **Subflow:** Search and select "Create a Case."
3. **Save the Subflow Element**
    - Click "Done."

10. Save and Activate the Flow

1. **Save the Flow**
    - Click "Save."
    - **Flow Label:** Enter "EduConsultPro Existing Student Flow."
    - Click "Save."
2. **Activate the Flow**
    - Click "Activate" to make the flow live and operational.



Create a Screen Flow to Combine All Flows in One Place

1. Create a Lightning App Page

1. **Open Salesforce and Navigate to the App Builder**
   - Go to the Setup menu (gear icon).
   - Enter "App Builder" in the Quick Find box and select "Lightning App Builder."
2. **Create a New App Page**
   - Click "New."
   - Choose "App Page" and click "Next."
   - Enter the **Page Name** (e.g., "EduConsultPro Flow").
   - Choose a **Page Template** (e.g., One Region or Two Regions based on your preference).
   - Click "Finish."

2. Add and Configure Screen Elements

a. Add the Welcome Screen

1. **Drag a Screen Component**
   - Drag a "Screen" component onto the main panel.
   - **Label:** Enter "Welcome Screen."
2. **Add a Display Text Component**
   - From the left-side panel, search for "Display Text."
   - Drag and drop it into the Welcome Screen.

- **Label:** Enter "SuccessMessage."

3. **Enter Text Content**
   - Paste the welcome message or relevant text into the Resource Picker box.
4. **Click Done** to save the component.

b. Add the Existing or New Student Confirmation Screen

1. **Drag a Screen Component**
   - Drag a "Screen" component onto the main panel after the Welcome Screen.
   - **Label:** Enter "Existing or New Student Confirmation Screen."
2. **Add a Radio Button Component**
   - From the left-side panel, search for "Radio Buttons."
   - Drag and drop it into the Existing or New Student Confirmation Screen.
   - **Label:** Enter "Are you an Existing Student."
3. **Configure Choices**
   - Click "Add Choice."
   - **Type:** Enter "Yes" and click "Create."
   - Repeat to add a choice labeled "No."
4. **Click Done** to save the component.

3. Add and Configure Decision Element

1. **Drag a Decision Element**
   - Drag a "Decision" element onto the main panel after the Existing or New Student Confirmation Screen.
   - **Label:** Enter "Decision 1."
2. **Configure the Decision Element**
   - **Outcome 1:**
     - **Label:** Enter "If Existing Student."
     - **Condition:**
       - **Resource:** {!Are_you_an_Existing_Student}
       - **Operator:** Equals
       - **Value:** {!Yes}
   - Click the "+" icon to add another outcome.
   - **Outcome 2:**
     - **Label:** Enter "If Not an Existing Student."
     - **Condition:**
       - **Resource:** {!Are_you_an_Existing_Student}
       - **Operator:** Equals
       - **Value:** {!No}
3. **Click Done** to save the decision element.

4. Add and Configure Subflow Elements

a. Existing Student Flow

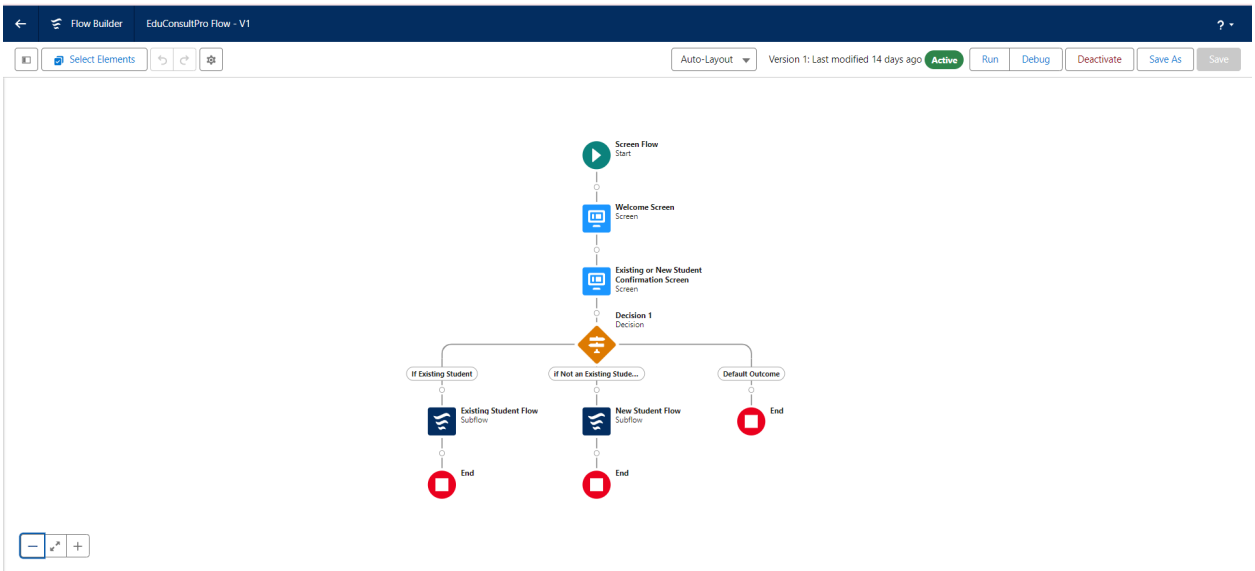
1. **Drag a SubFlow Element**
   - Drag a "Subflow" element onto the main panel after the Decision 1 element on the "If Existing Student" path.
   - **Search for:** EduConsultantPro Existing Student Flow.
   - **Label:** Enter "Existing Student Flow."
2. **Click Done** to save the subflow element.

b. New Student Flow

1. **Drag Another SubFlow Element**
   - Drag another "Subflow" element onto the main panel after the Decision 1 element on the "If Not an Existing Student" path.
   - **Search for:** EduConsultPro Student Flow.
   - **Label:** Enter "New Student Flow."
2. **Click Done** to save the subflow element.

5. Save and Finalize the Flow

1. **Save the Flow**
   - Click "Save."
   - **Flow Label:** Enter "EduConsultPro Flow."
2. **Activate the Flow**
   - Click "Activate" to make the flow available.



Create a Lightning App Page

1. Create a New Home Page

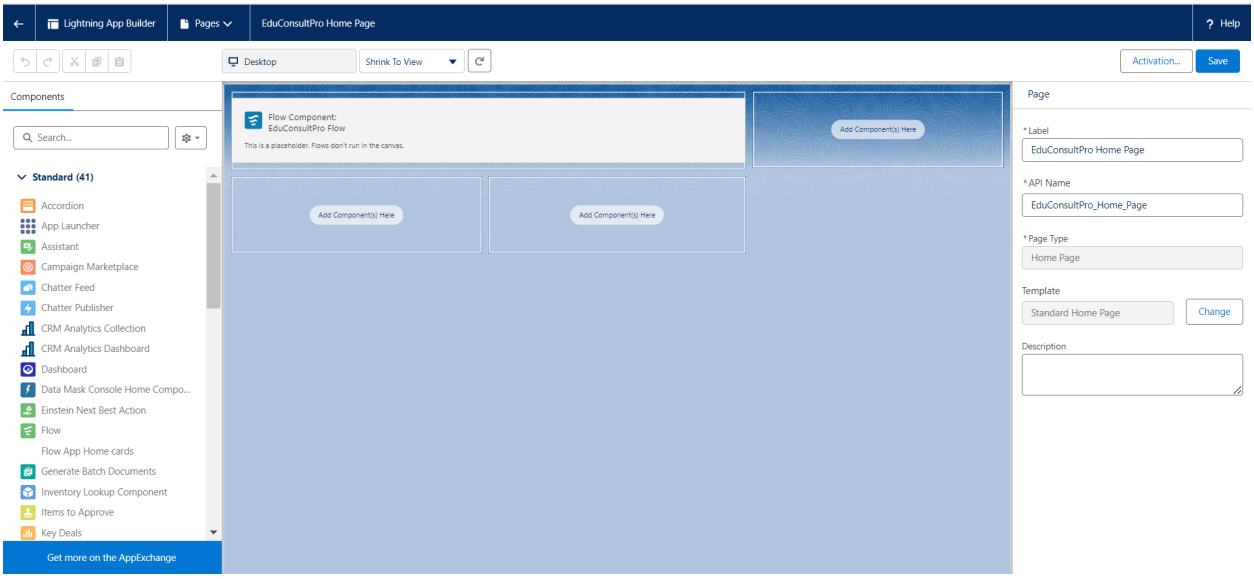
1. **Open Salesforce and Navigate to App Builder**
   - From Setup, enter "App Builder" in the Quick Find box and select "Lightning App Builder."
2. **Create a New Page**
   - Click "New."
   - Select "Home Page" and click "Next."
   - **Page Name:** Enter "EduConsultPro Home Page."
   - **Page Template:** Choose the "Standard Home Page" template.
   - Click "Finish."

2. Add the Flow Component

1. **Add a Flow Component**
   - In the Lightning App Builder interface, drag the "Flow" component from the left panel to the desired region of the page layout (e.g., the top-right region).
2. **Configure the Flow Component**
   - With the Flow component selected, use the right panel to search for and select the flow named "EduConsultantPro Flow."
3. **Save the Page**
   - Click "Save" to save your changes.

3. Activate and Assign the Page

1. **Activate the Page**
   - Click "Activate" in the top-right corner of the Lightning App Builder.
2. **Assign the Page to Apps and Profiles**
   - Click "App and Profile" in the activation options.
   - Click "Assign to Apps and Profiles."
3. **Select the Sales App**
   - In the app assignment screen, select the "Sales" app.
   - Click "Next."
4. **Select Profiles**
   - Scroll down the list of profiles and select "System Administrator."
   - Click "Next."
5. **Review the Assignment**
   - Review the assignment details and click "Save" to finalize the page assignment.


Lightning App Builder
Pages
EduConsultPro Home Page
Help
Desktop
Shrink To View
Activation...
Save
Components
Search...
Standard (41)
Accordion
App Launcher
Assistant
Campaign Marketplace
Chatter Feed
Chatter Publisher
CRM Analytics Collection
CRM Analytics Dashboard
Dashboard
Data Mask Console Home Compo...
Einstein Next Best Action
Flow
Flow App Home cards
Generate Batch Documents
Inventory Lookup Component
Items to Approve
Key Deals
Get more on the AppExchange
Flow Component:
EduConsultPro Flow
This is a placeholder. Flows don't run in the canvas.
Add Component(s) Here
Add Component(s) Here
Add Component(s) Here
Page
* Label
EduConsultPro Home Page
* API Name
EduConsultPro_Home_Page
* Page Type
Home Page
Template
Standard Home Page
Change
Description