Institution Distributions

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Project Abstract

In today's competitive environment, effective customer relationship management is vital for any institution aiming to provide superior service. This project focuses on developing a customized CRM application using Salesforce to help to students to make them choose a best colleg.Salesforce, a leading CRM platform, offers robust tools and capabilities to streamline service management and improve customer satisfaction.

The CRM application will serve as a centralized platform where institutions can track and manage all customer interactions, from meeting to fullfilling the dreams of students. It will allow institutions to store and access detailed student information, including contact details, and preferences. By implementing this CRM application, institutions can expect to see significant improvements in customer satisfaction, and overall operational efficiency. The application will provide a structured approach to handling one to one interactions, reducing the chances of miscommunication and missed opportunities. Additionally, the insights gained from the application's analytics will help institutions identify areas for improvement and optimize their services.

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Introduction

Educational institution offering a variety of courses and programs in diverse fields. With a growing number of prospective students seeking admission each year, the institute faces challenges in managing the admission process, students enquiry, and study related advices .To address these challenges, Institution decides to leverage Salesforce CRM to streamline the admission process and enhance the overall experience for both students and admissions staff.

The use case focuses on the admission process for prospective students interested in enrolling in courses and programs. The goal is to provide a seamless and transparent experience for students while enabling admissions staff to efficiently review and process admission applications, students enquiry and case management.

In today's competitive business environment, maintaining a strong relationship with customers is crucial for the success of any institution. A Customer Relationship Management (CRM) application is designed to streamline and enhance interactions between an institution and its customers. This project aims to develop a CRM application specifically tailored to manage the services offered by the institution, ensuring efficient service delivery and improving customer satisfaction.

The primary objective of the CRM application is to provide a comprehensive platform that integrates all aspects of customer interaction and service management. This includes managing customer information,interacting with students, and providing insights through data analysis. By centralizing these functions, the CRM application will enable the institution to deliver a more personalized and responsive customer experience.

Task-1 Create Objects from Spreadsheet

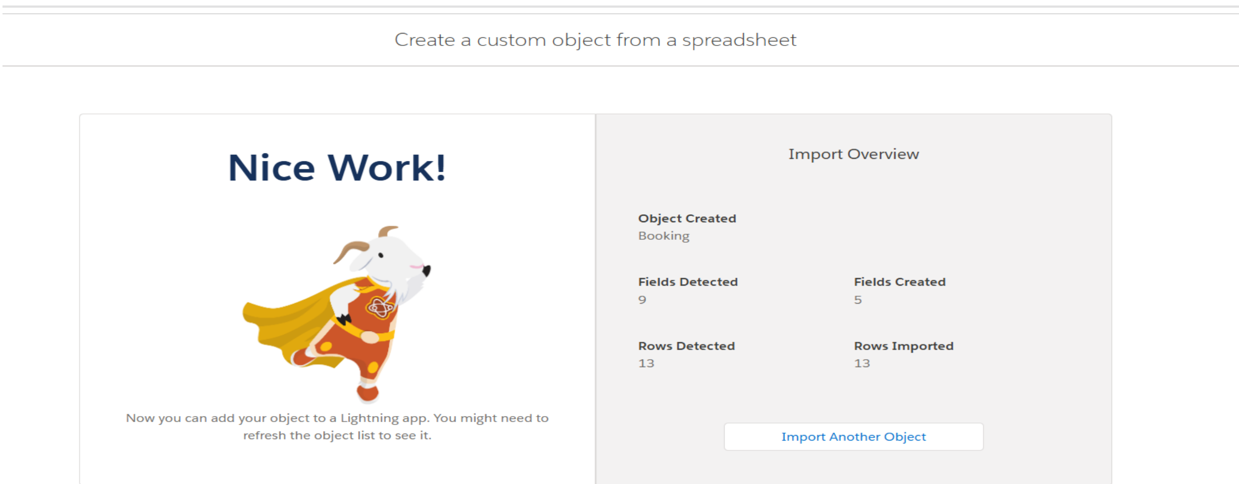
- ➤ Directly Creating Objects from Spreadsheet in Salesforce
- ➤ First we have to create some spreadheets of respective object with some values in it.

1.1 Create Students object

- ➤ Go to your object manager and and click on create object from spreadsheet.
- ➤ select the option upload.
- ➤ select the students spreadsheet.
- ➤ Then set the suitable data types for the fields and click on next.
- ➤ Now, in the object properties give the label and click on create.

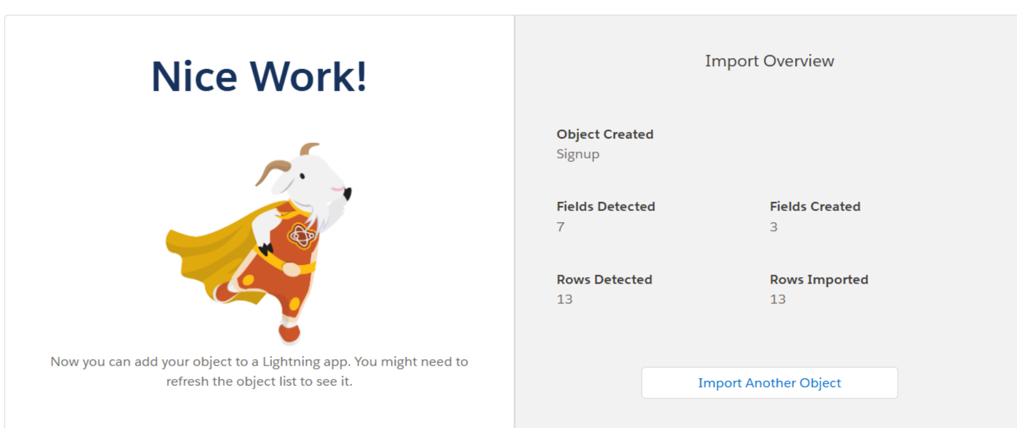
1.2 Create Bookings object

- ➤ Go to your object manager and and click on create object from spreadsheet.
- ➤ select the option upload.
- ➤ select the Bookings spreadsheet.
- ➤ Then set the suitable data types for the fields and click on next.
- ➤ Now, in the object properties give the label and click on create.



1.3 Create signups object

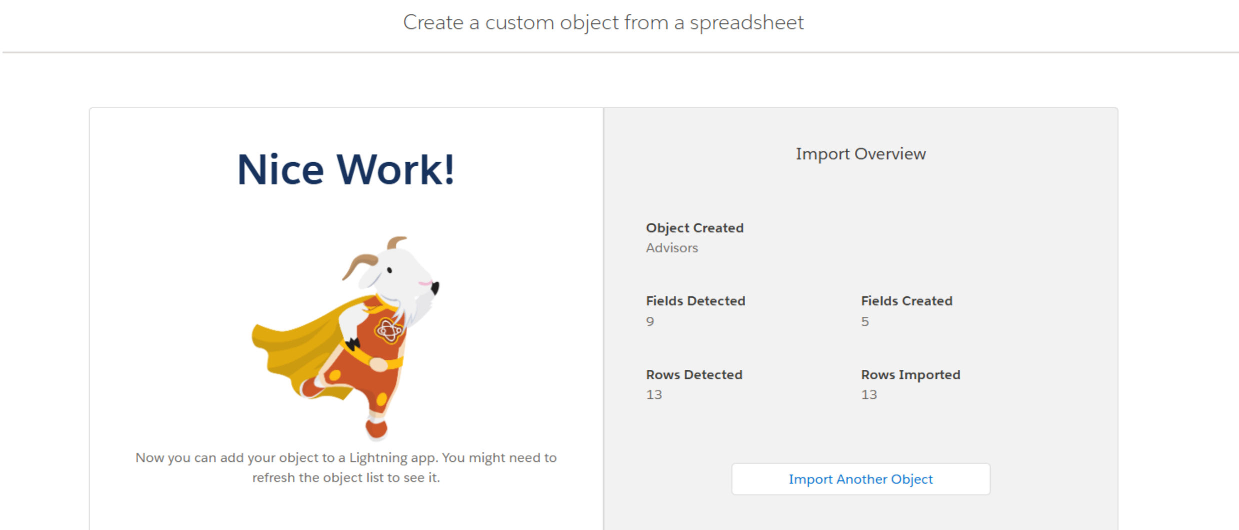
- ➤ Go to your object manager and and click on create object from spreadsheet.
- ➤ select the option upload.
- ➤ select the signups spreadsheet.
- ➤ Then set the suitable data types for the fields and click on next.
- ➤ Now, in the object properties give the label and click on create.



1.4 Create Advisors object

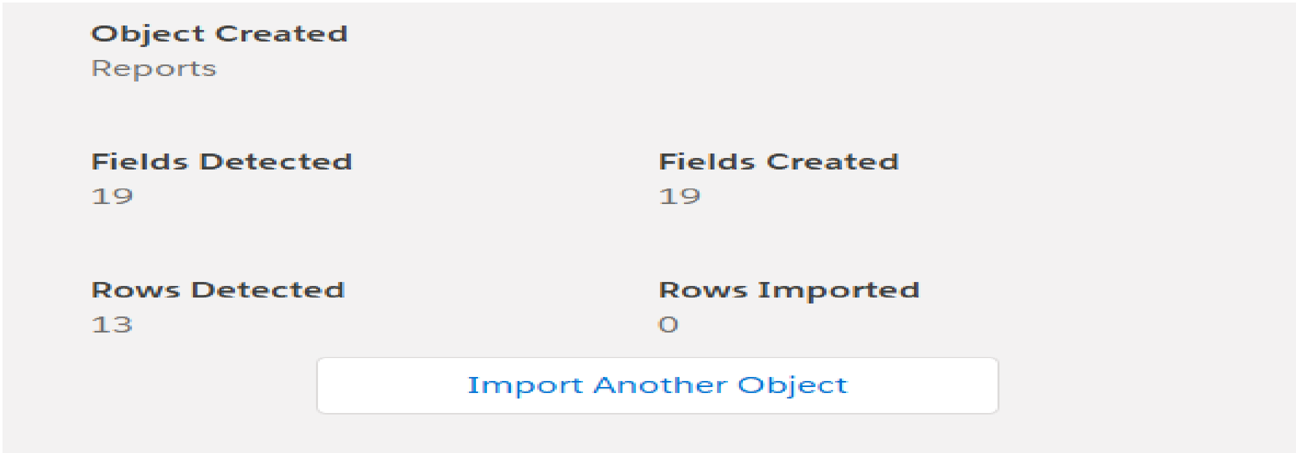
- ➤ Go to your object manager and and click on create object from spreadsheet.

- select the option upload.
- select the Advisors spreadsheet.
- Then set the suitable data types for the fields and click on next.
- Now, in the object properties give the label and click on create.



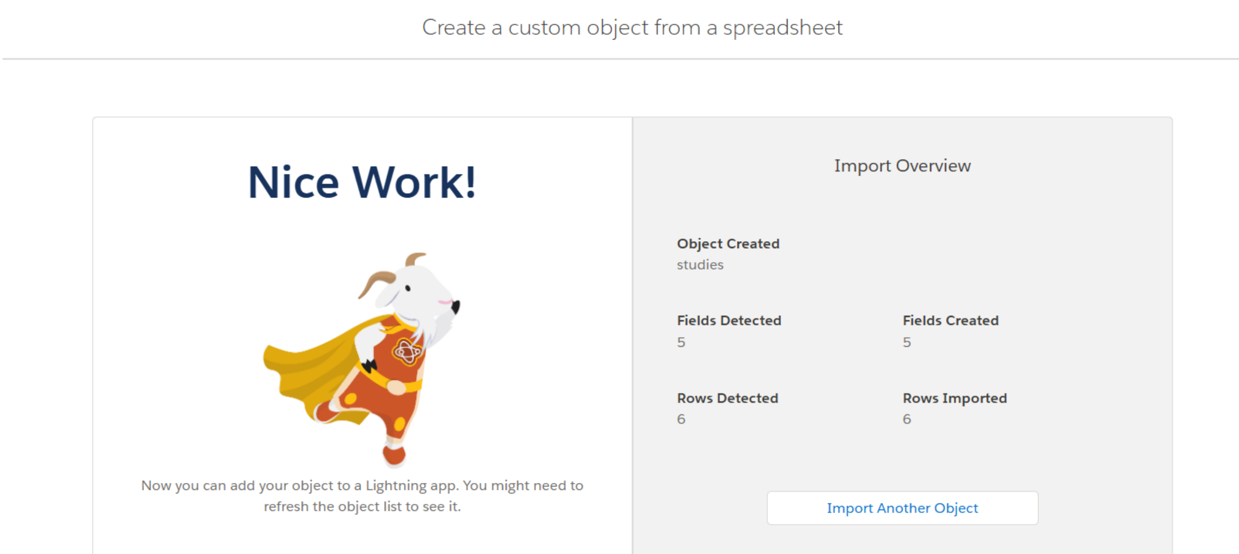
1.5 Create Reports object

- Go to your object manager and and click on create object from spreadsheet.
- select the option upload.
- select the Reports spreadsheet.
- Then set the suitable data types for the fields and click on next.
- Now, in the object properties give the label and click on create.



1.6 Create studies object

- Go to your object manager and and click on create object from spreadsheet.
- select the option upload.
- select the studies spreadsheet.
- Then set the suitable data types for the fields and click on next.
- Now, in the object properties give the label and click on create.



1.7 Create Detailss object

- Go to your object manager and and click on create object from spreadsheet.
- select the option upload.
- select the Details spreadsheet.
- Then set the suitable data types for the fields and click on next.
- Now, in the object properties give the label and click on create.

1.8 Create Infrastructures object

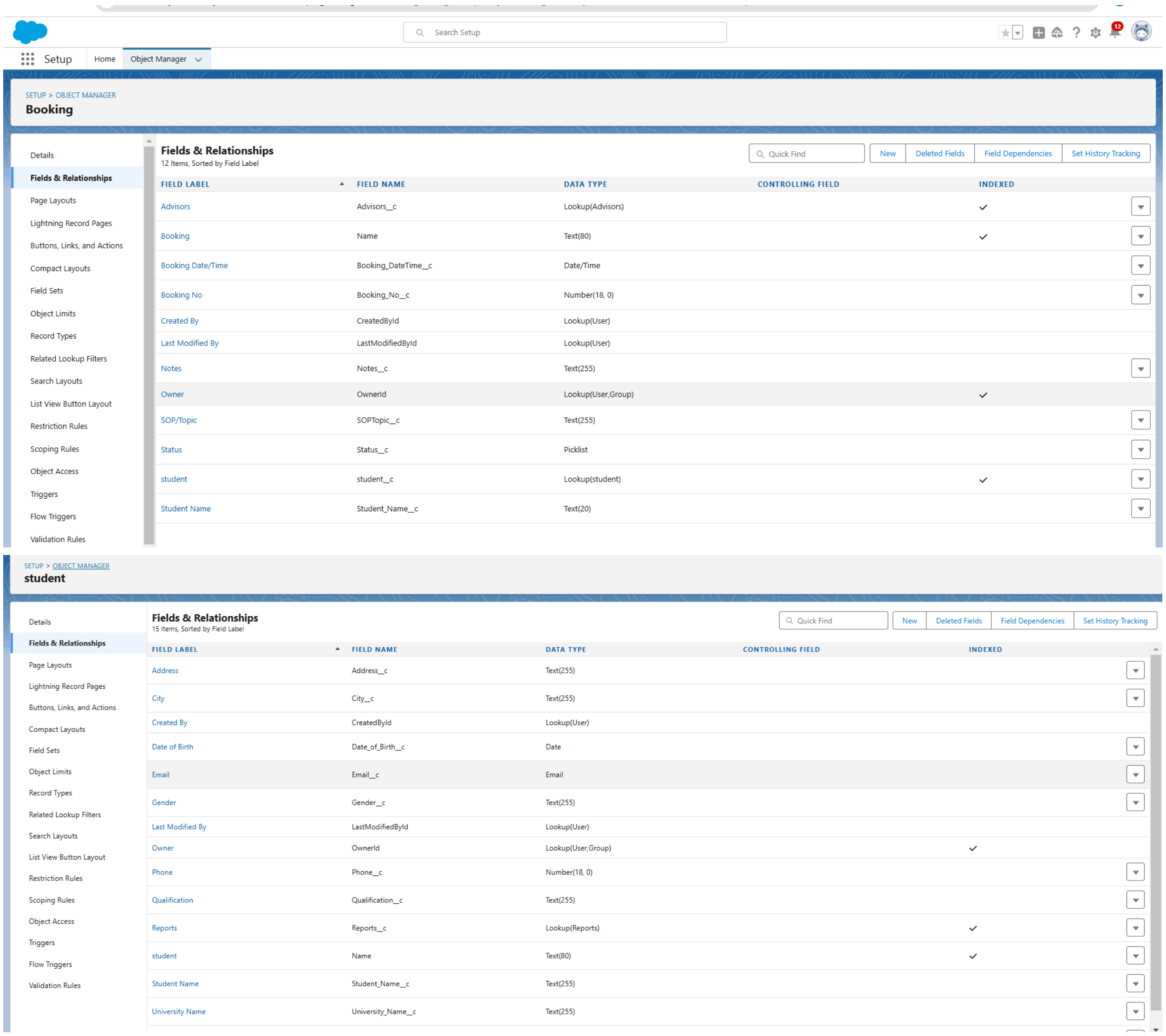
- Go to your object manager and and click on create object from spreadsheet.
- select the option upload.
- select the Infrastructures spreadsheet.
- Then set the suitable data types for the fields and click on next.
- Now, in the object properties give the label and click on create.

1.9 Create contacts object

- Go to your object manager and and click on create object from spreadsheet.
- select the option upload.
- select the contacts spreadsheet.
- Then set the suitable data types for the fields and click on next.
- Now, in the object properties give the label and click on create.
- Now, in the object properties give the label and click on create.

1.10 Create Relationship among the objects

- Create lookup between Booking and student, Booking and Advisors.
- Also create a lookup between student and reports to store the student queries.



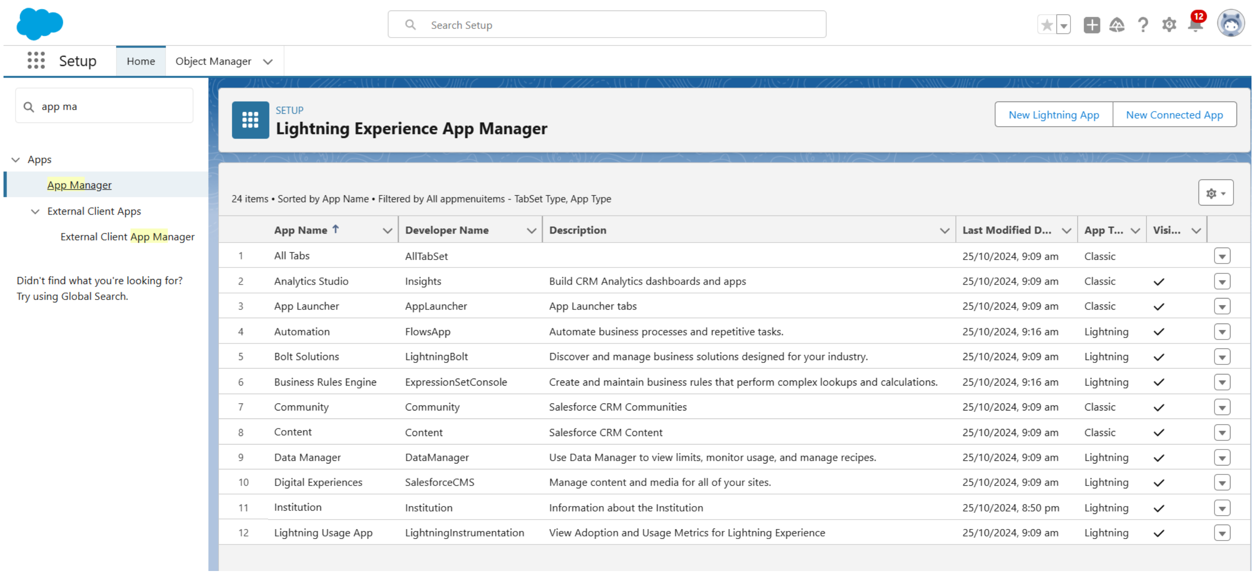
1.11 create Tabs for the respective objects

- ➤ In the home, go to quick find box and search for the tabs.
- ➤ Go to tabs, under cutsom tabs click on new.
- ➤ Give object name as which object you are relating this tab.
- ➤ And give the tab style and click on next,save.

1.12 create Lightning App Page

- ➤ Go to Setup, search for the App Manager in quick find.
- ➤ Click on New Lightning App.
- ➤ Give app name as “Institution”, click Next, Next, Next.

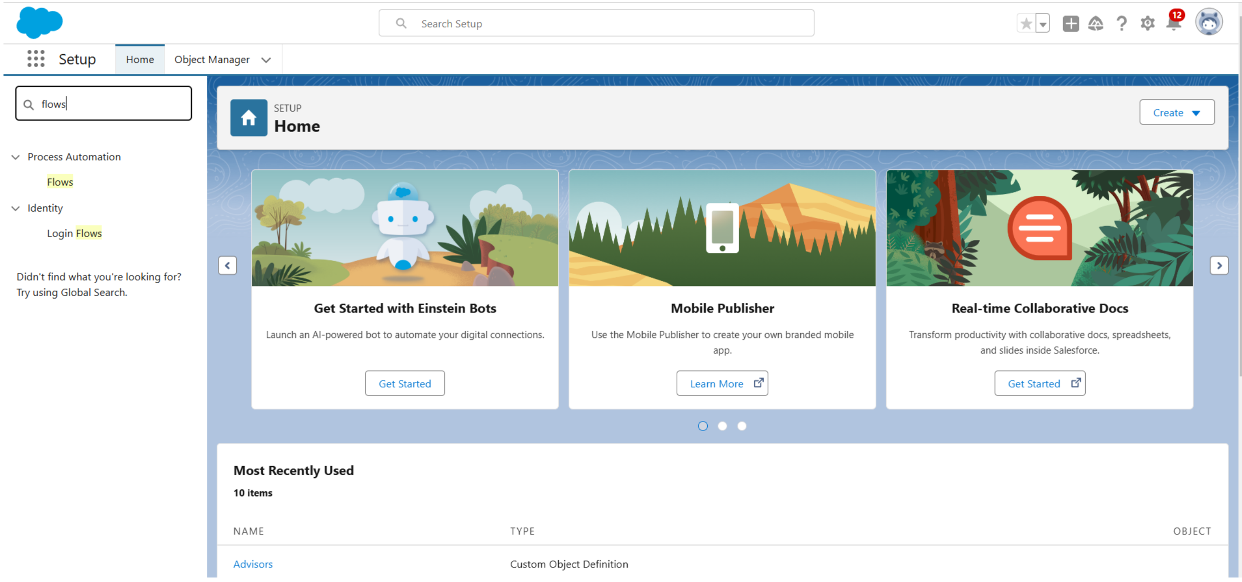
- ➤ Add Students,studies, advisors, conatcts, Bookings, Infrastructures, signups, reports, contacts, Detailss from the Available Items to Selected Items.
- ➤ Add “System Administrator” profile from Available Profiles to Selected Profiles, click Save & Finish.

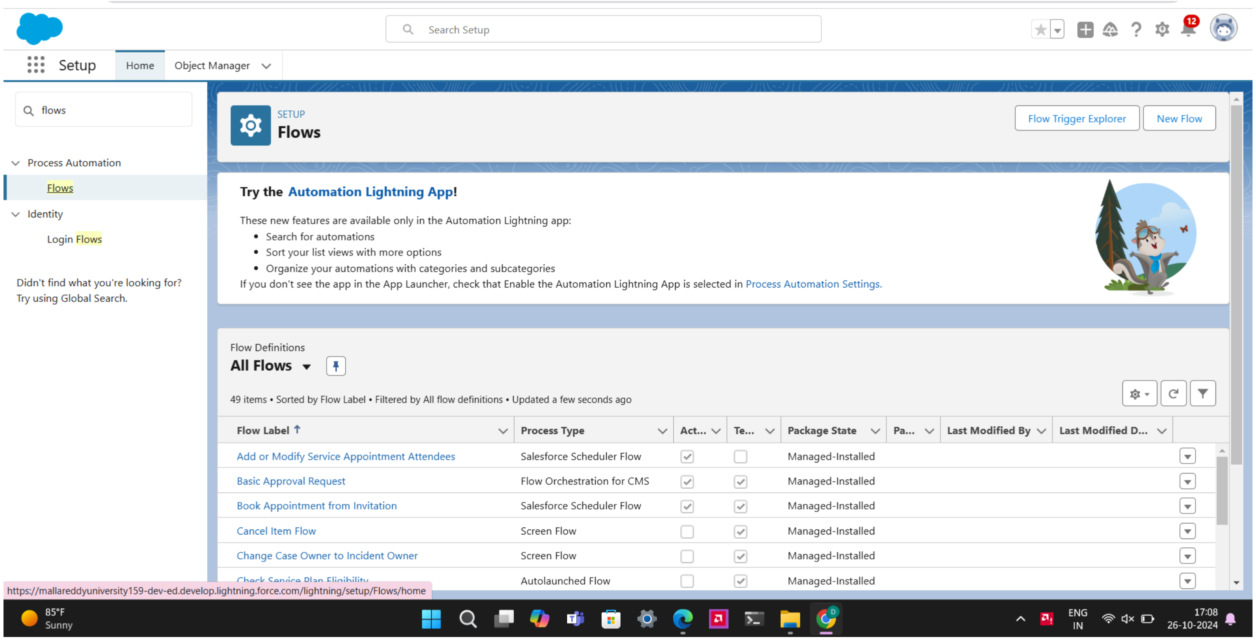


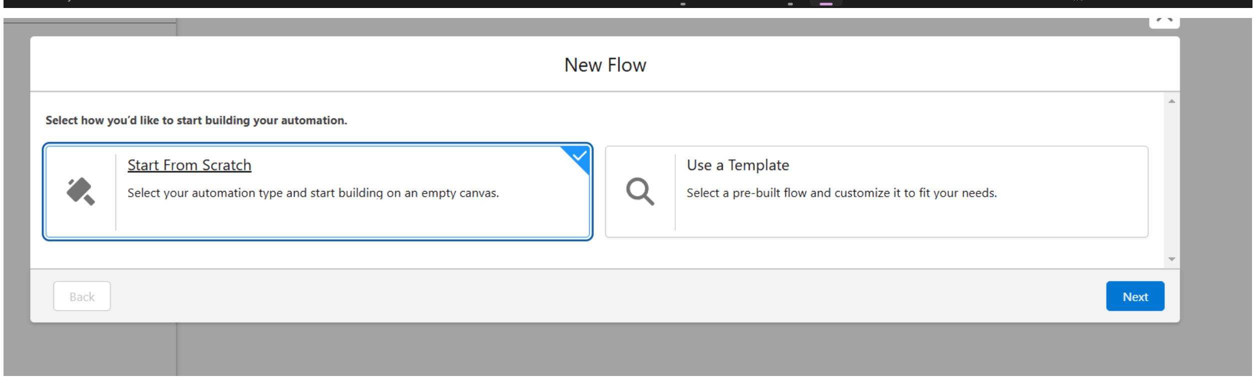
TASK-2 ScreenFlow for Student Application process

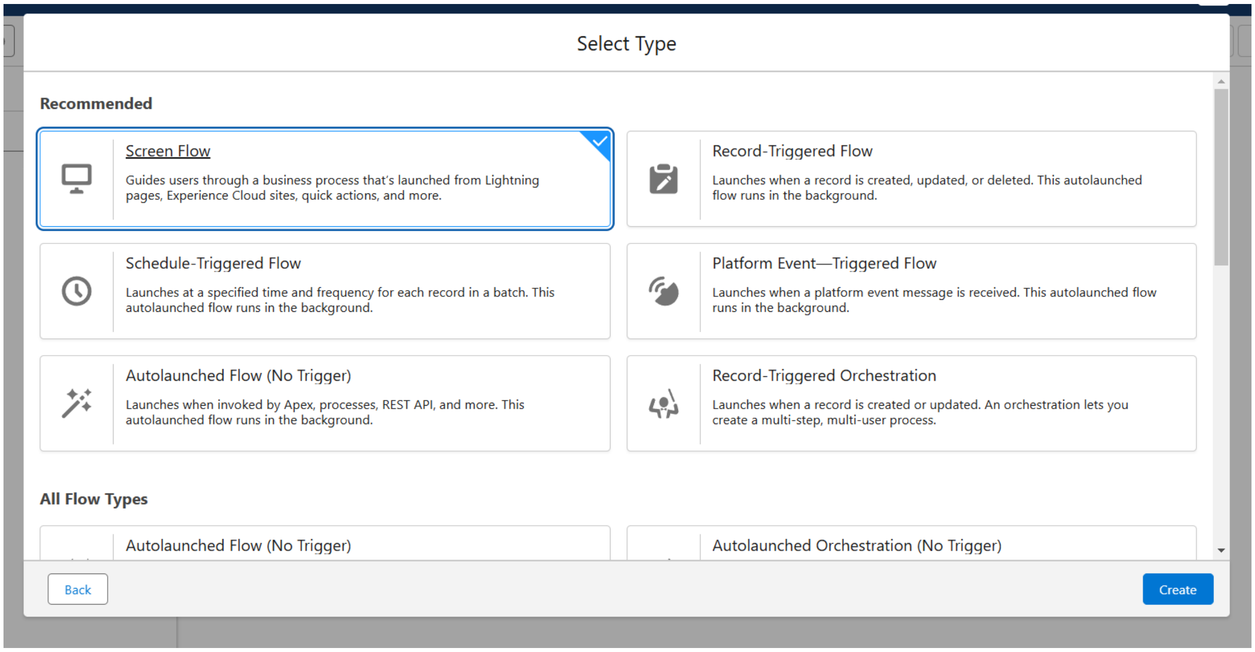
2.1 Create the flow

- ➤ Go to setup, search flows in the quick find box.
- ➤ Click on flows, click on new flow.
- ➤ Click on screen flow and click on create.


Search Setup
Setup
Home
Object Manager
flows
Process Automation
Flows
Identity
Login Flows
Didn't find what you're looking for?
Try using Global Search.
SETUP
Home
Create
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started
Most Recently Used
10 items
NAME
TYPE
OBJECT
Advisors
Custom Object Definition

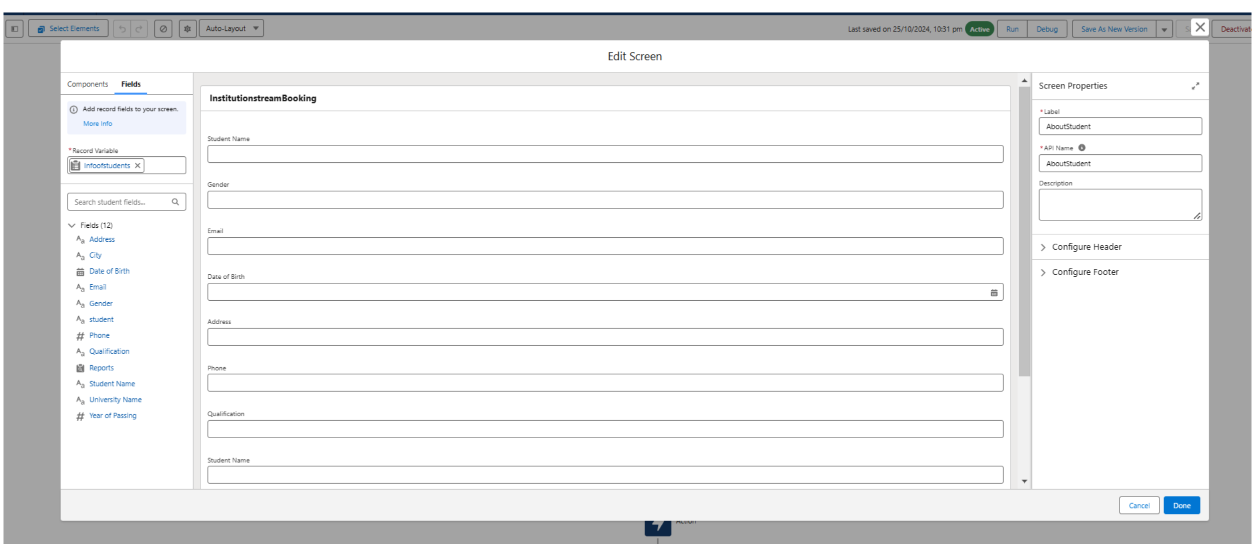

Search Setup
Setup
Home
Object Manager
flows
Process Automation
Flows
Identity
Login Flows
Didn't find what you're looking for?
Try using Global Search.
SETUP
Flows
Flow Trigger Explorer
New Flow
Try the Automation Lightning App!
These new features are available only in the Automation Lightning app:
Search for automations
Sort your list views with more options
Organize your automations with categories and subcategories
If you don't see the app in the App Launcher, check that Enable the Automation Lightning App is selected in Process Automation Settings.
Flow Definitions
All Flows
49 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago
Flow Label
Process Type
Act...
Te...
Package State
Pa...
Last Modified By
Last Modified D...
Add or Modify Service Appointment Attendees
Salesforce Scheduler Flow
Managed-Installed
Basic Approval Request
Flow Orchestration for CMS
Managed-Installed
Book Appointment from Invitation
Salesforce Scheduler Flow
Managed-Installed
Cancel Item Flow
Screen Flow
Managed-Installed
Change Case Owner to Incident Owner
Screen Flow
Managed-Installed
Autolaunched Flow
Managed-Installed
https://mallareddyuniversity159-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home
85°F
Sunny
ENG
IN
17:08
26-10-2024


New Flow
Select how you'd like to start building your automation.
Start From Scratch
Select your automation type and start building on an empty canvas.
Use a Template
Select a pre-built flow and customize it to fit your needs.
Back
Next



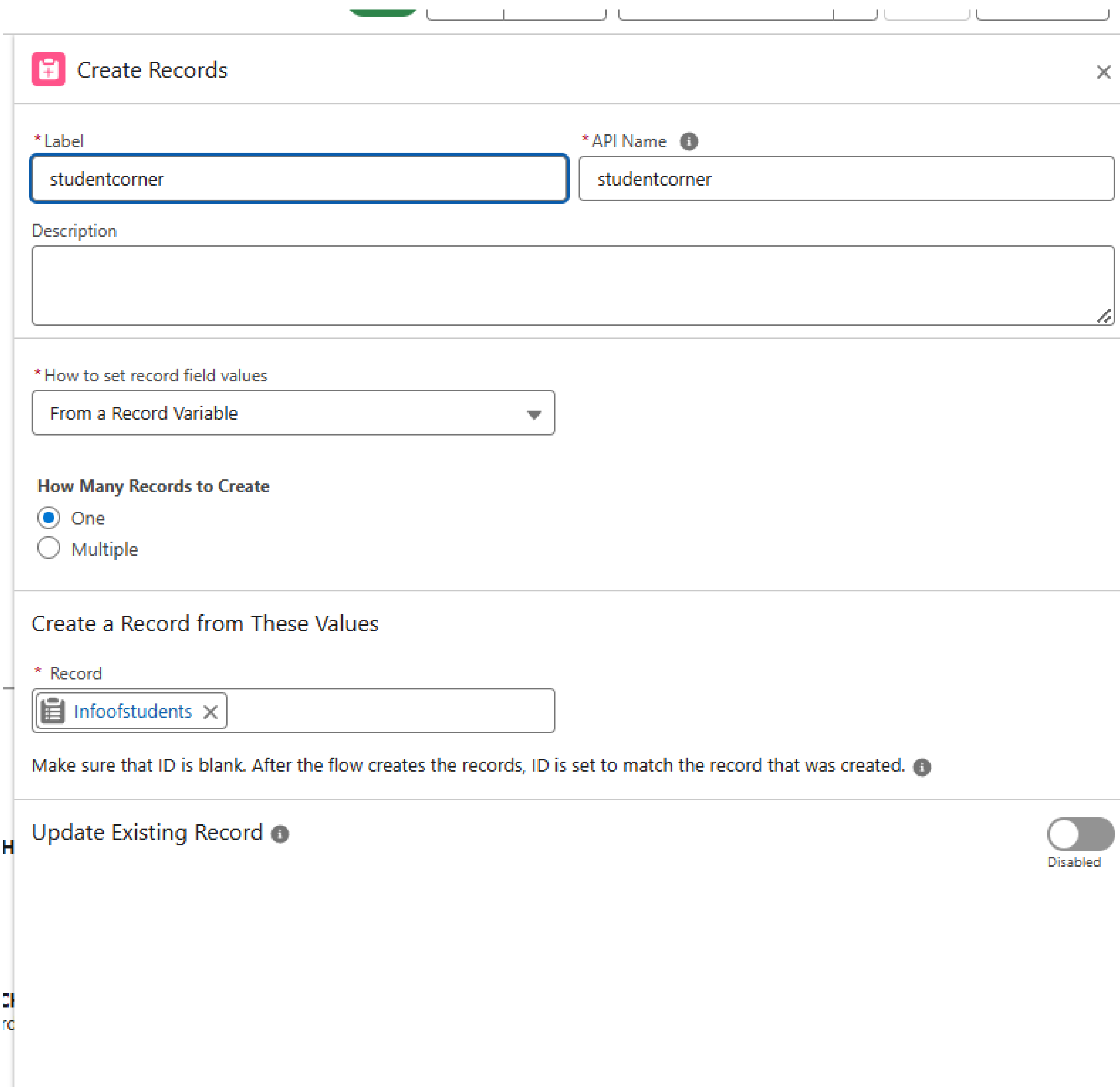
2.2 Add a screen element

- Click on the flow and select screen.
- Give the name for the screen as AboutStudent.
- Now, in the left side go to fields and click on new resource.
- create a record variable named infoofstudents for accessing all the student object fields into teh flow.
- After creating, select and drag the necessary fields onto the screen, the click on done.



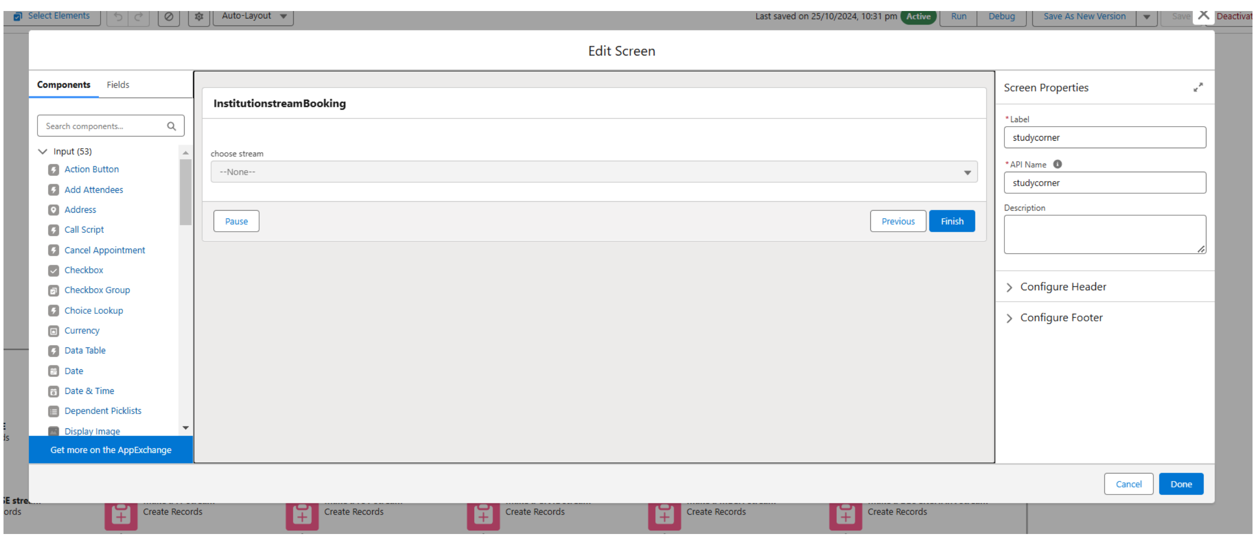
2.3 create a record

- Under AboutStudent, click on + , click on create record.
- Give the name as Studentcorner.
- Give the record value as infoofstudents.
- click on save.



2.4 Add a screen element

- Under studentcorner, click on + , click on screen.
- Give the name as studycorner.
- In the components, search for picklist, give name as choosestream.
- In the choice place, type CSE and click create CSE choice, then CSE choice is created.
- In the choice place, type IT and click create IT choice, then IT choice is created.
- In the choice place, type MECH and click create MECH0 choice, then MECH choice is created.
- In the choice place, type IOT and click create IOT choice, then IOT choice is created.
- In the choice place, type CIVIL and click create CIVIL choice, then CIVIL choice is created.
- In the choice place, type BLOCKCHAIN and click create BLOCKCHAIN choice, then BLOCKCHAIN choice is created.
- click on done.



2.5 Add a screen element

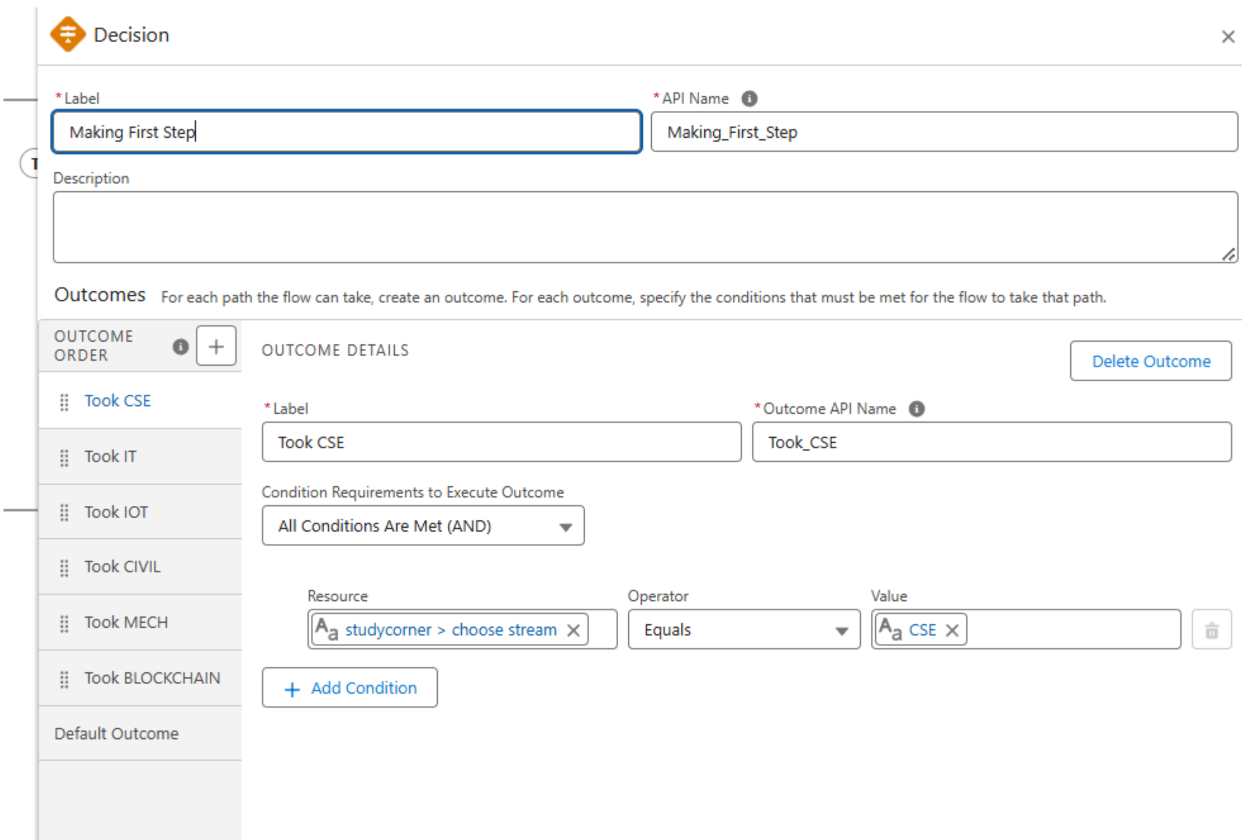
- Under AboutStudent, click on + , click on decision element.
- Give the name as Making First Step.

- ➤ Under outcome label it as “Took CSE” and write the condition such as below:

  Resource : choosestream

  Operator : Equals

  Value : CSE
- ➤ Click on + beside outcome label and perform the above step for the IT,IOT,MECH,CIVIL,BLOCKCHAIN.
- ➤ click on save.



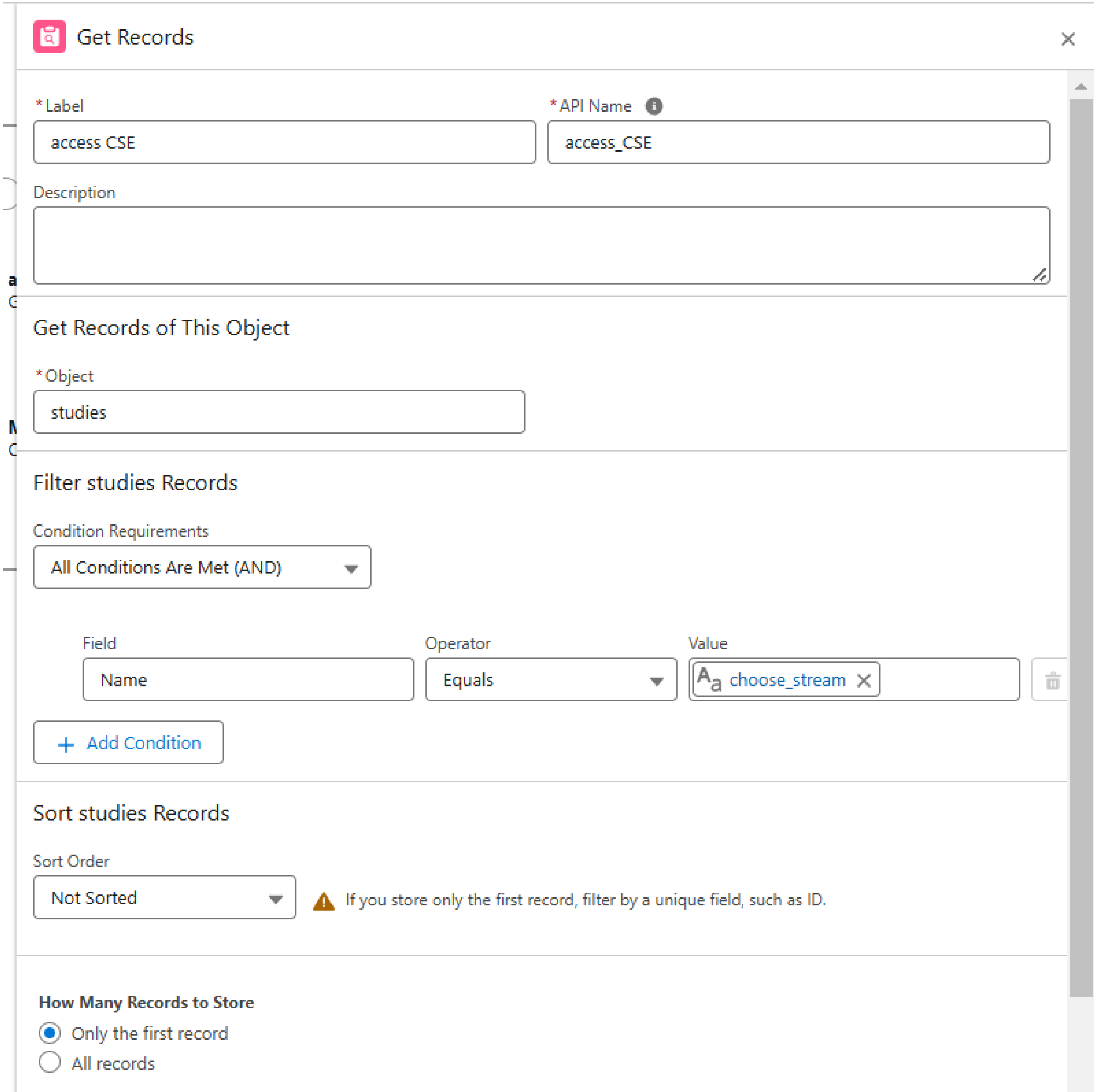
2.6 Add get record element

- ➤ Under the decision element , in the took CSE path, add a get record element.
- ➤ label it as access CSE.
- ➤ Give the object as studies and place the following in the field and

value :

field: Name ; value: choose_stream

➤ Click on save.



2.7 Add get record element

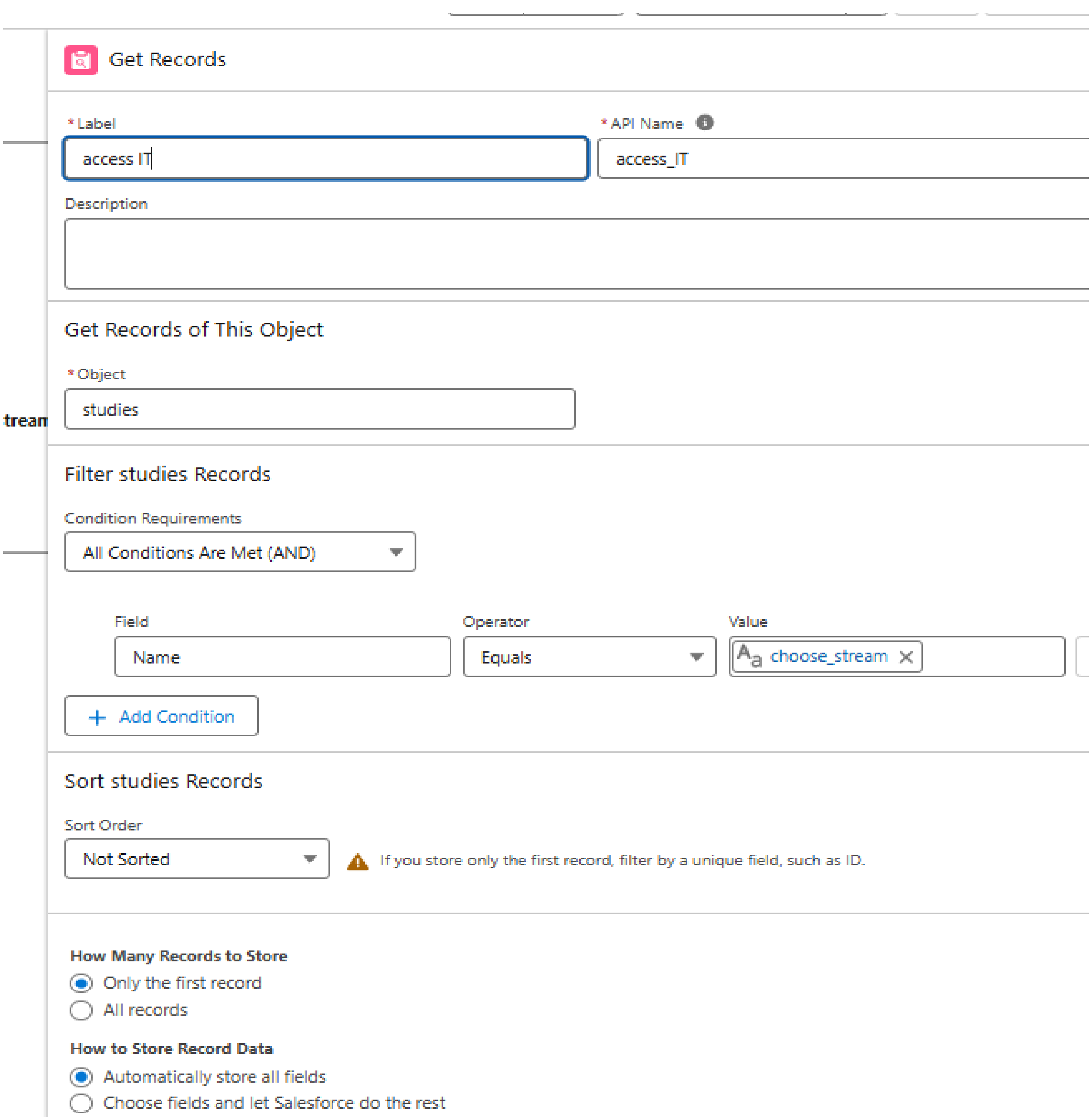
➤ Under the decision element , in the took IT path, add a get record element.

➤ label it as access IT.

➤ Give the object as studies and place the following in the field and

value :
field: Name ; value: choose_stream

➤ Click on save.

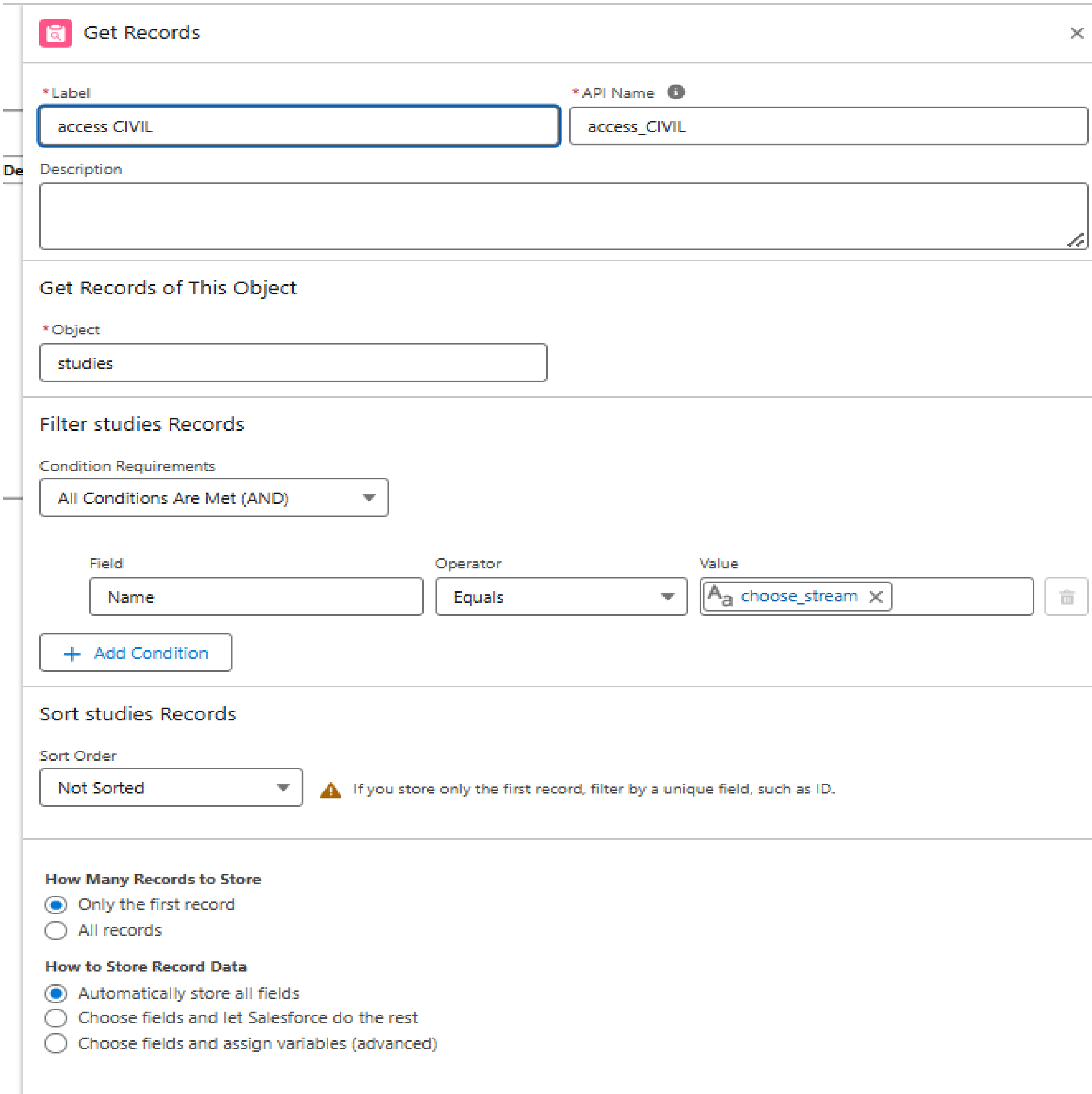


2.8 Add get record element

➤ Under the decision element , in the took CIVIL path, add a get record element.

➤ label it as access CIVIL.

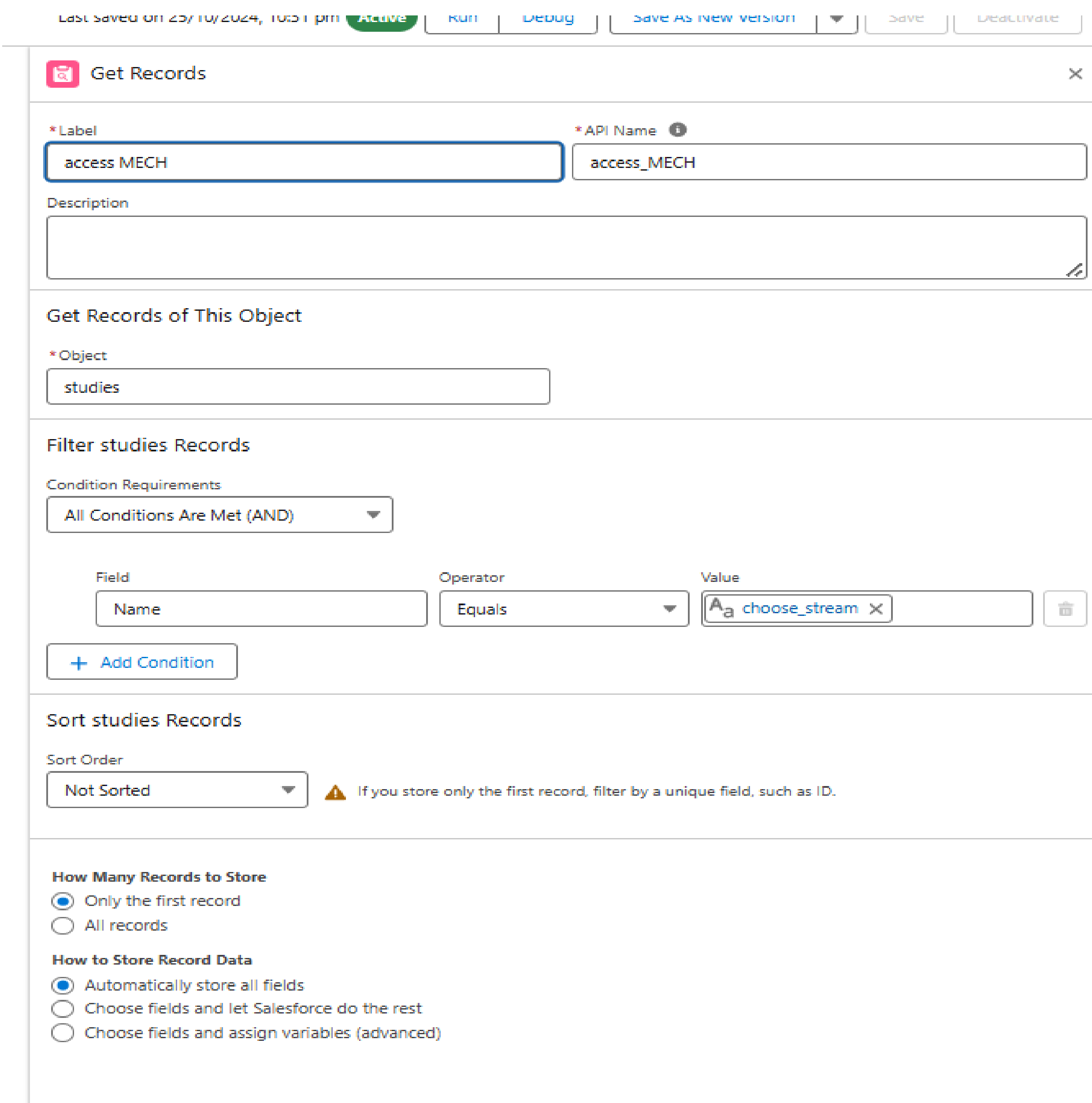
➤ Give the object as studies and place the following in the field and value : field: Name ; value: choose_stream
➤ Click on save.



2.9 Add get record element

➤ Under the decision element , in the took MECH path, add a get record element.

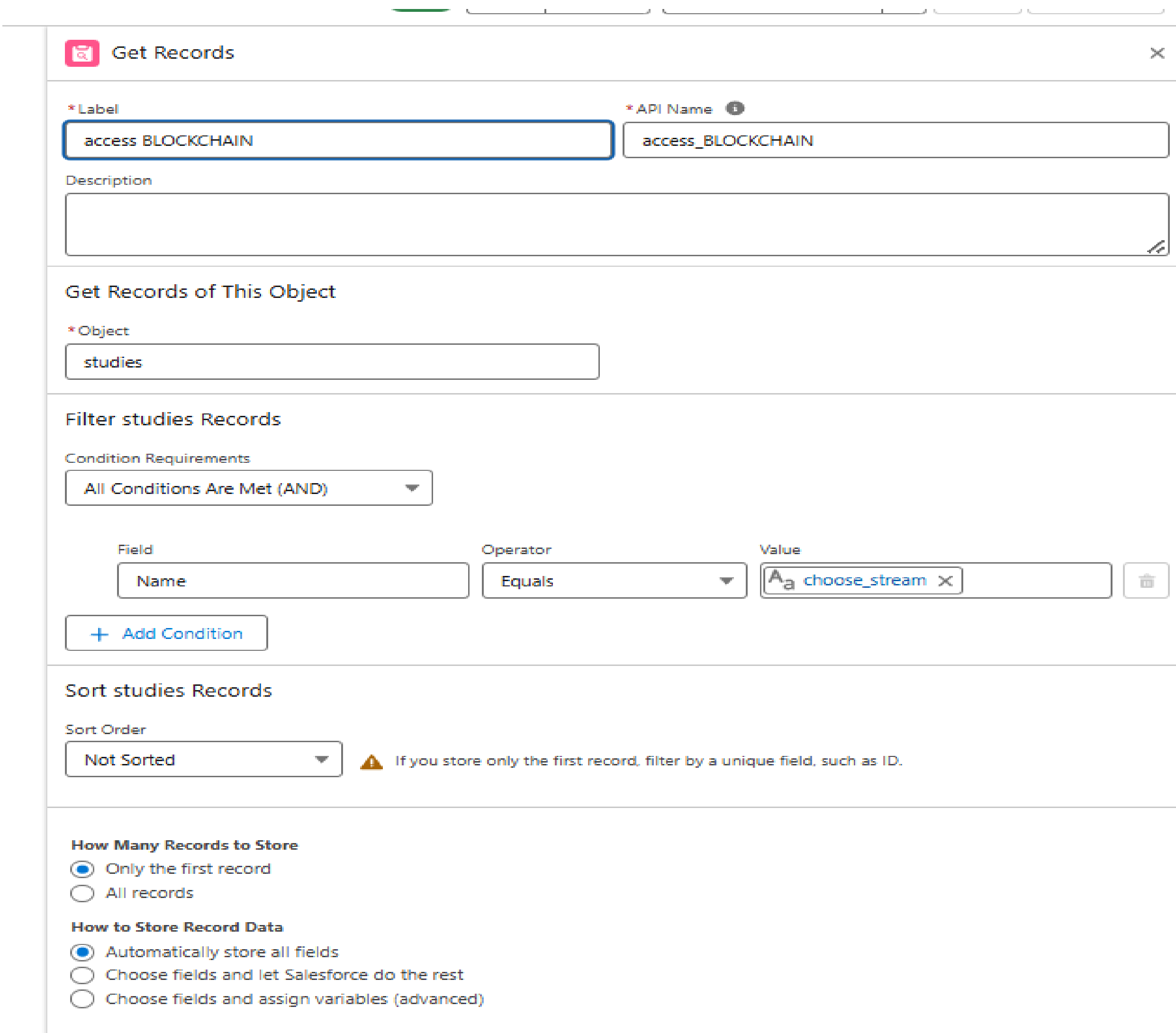
➤ label it as access MECH.
➤ Give the object as studies and place the following in the field and value :
field: Name ; value: choose_stream
➤ Click on save.



2.10 Add get record element

➤ Under the decision element , in the took BLOCKCHAIN path, add a get record element.

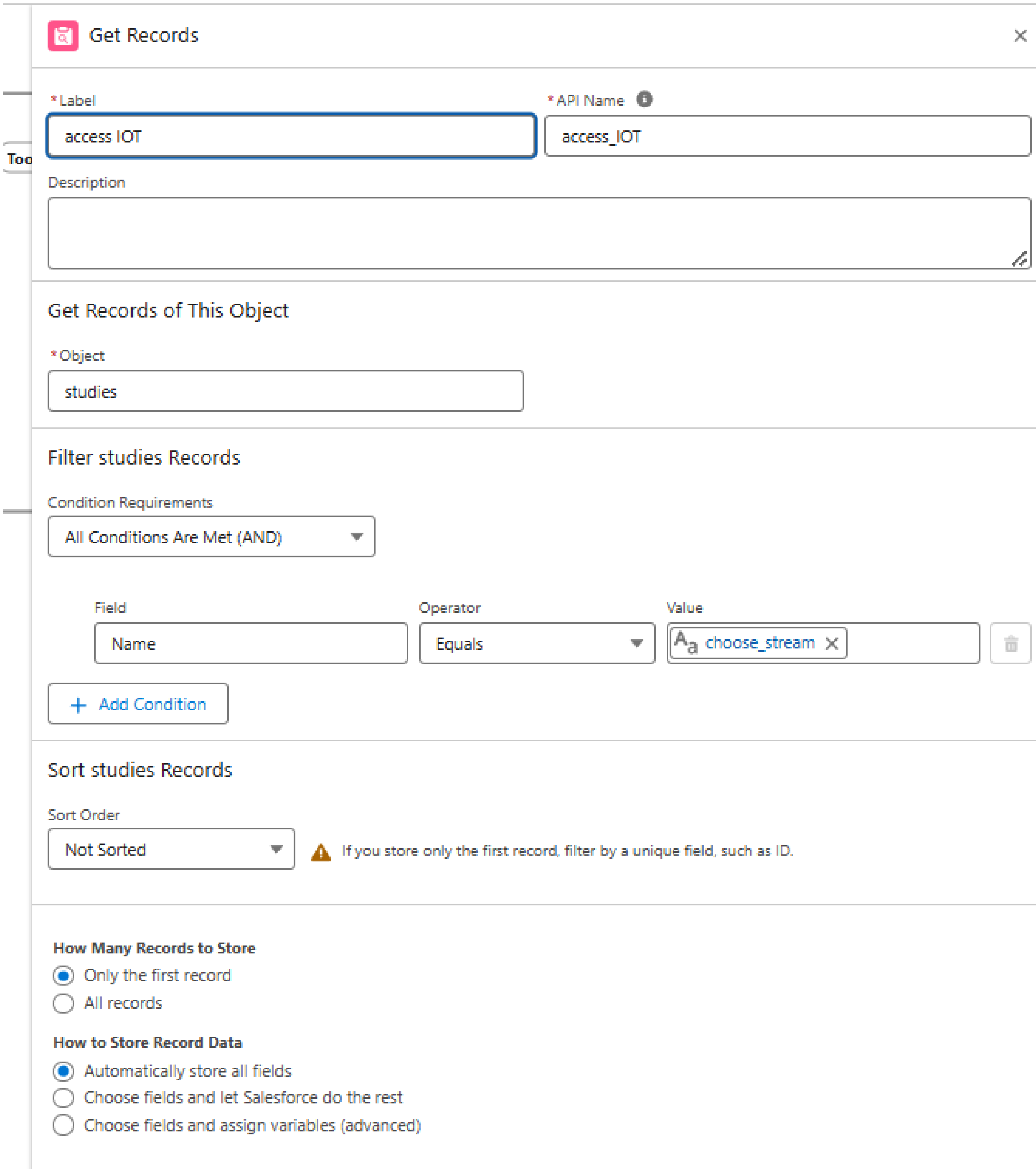
- label it as access BLOCKCHAIN.
- Give the object as studies and place the following in the field and value :
  field: Name ; value: choose_stream
- Click on save.



2.11 Add get record element

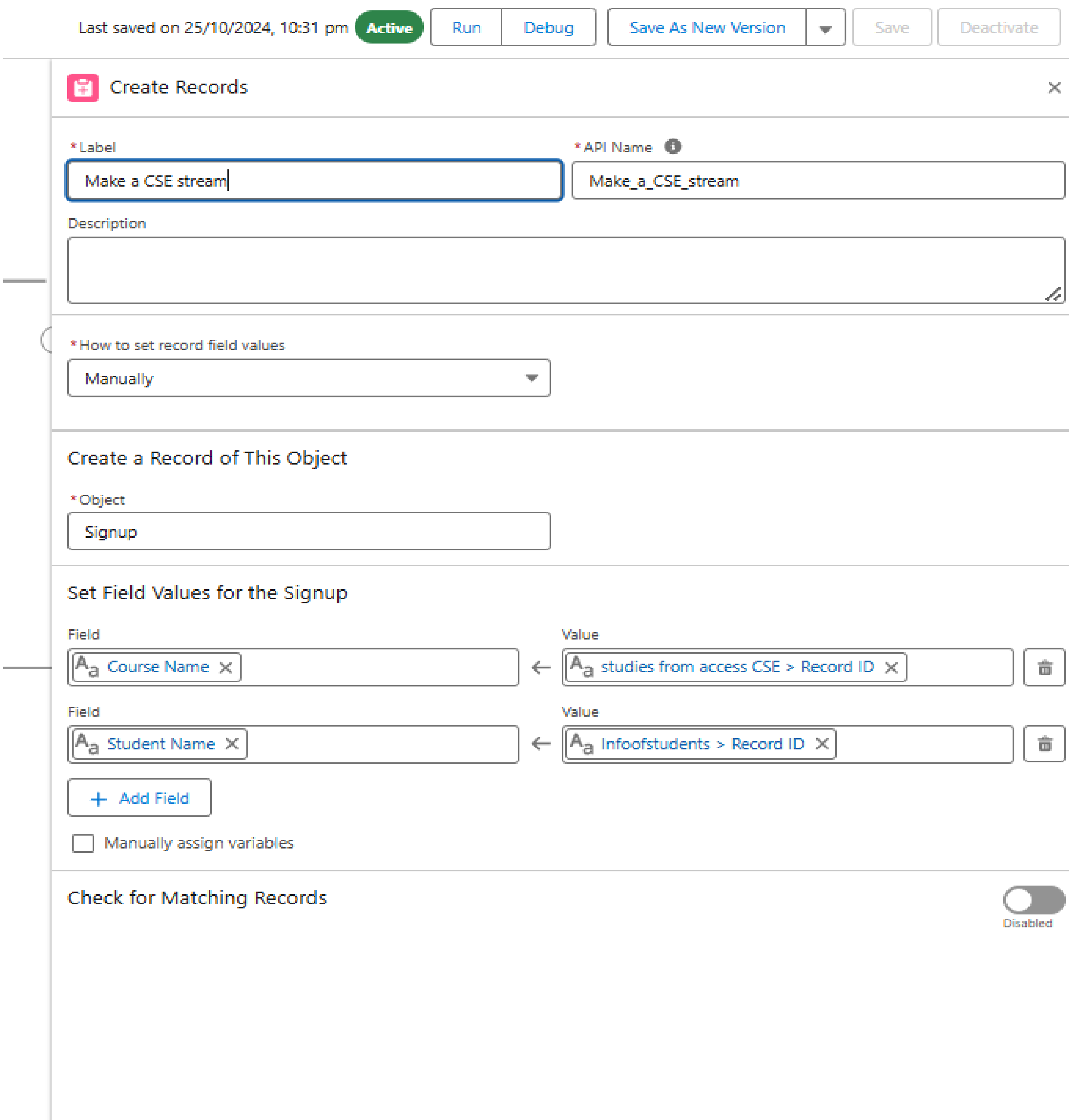
- Under the decision element , in the took IOT path, add a get record element.
- label it as access IOT.

➤ Give the object as studies and place the following in the field and value :
field: Name ; value: choose_stream
➤ Click on save.



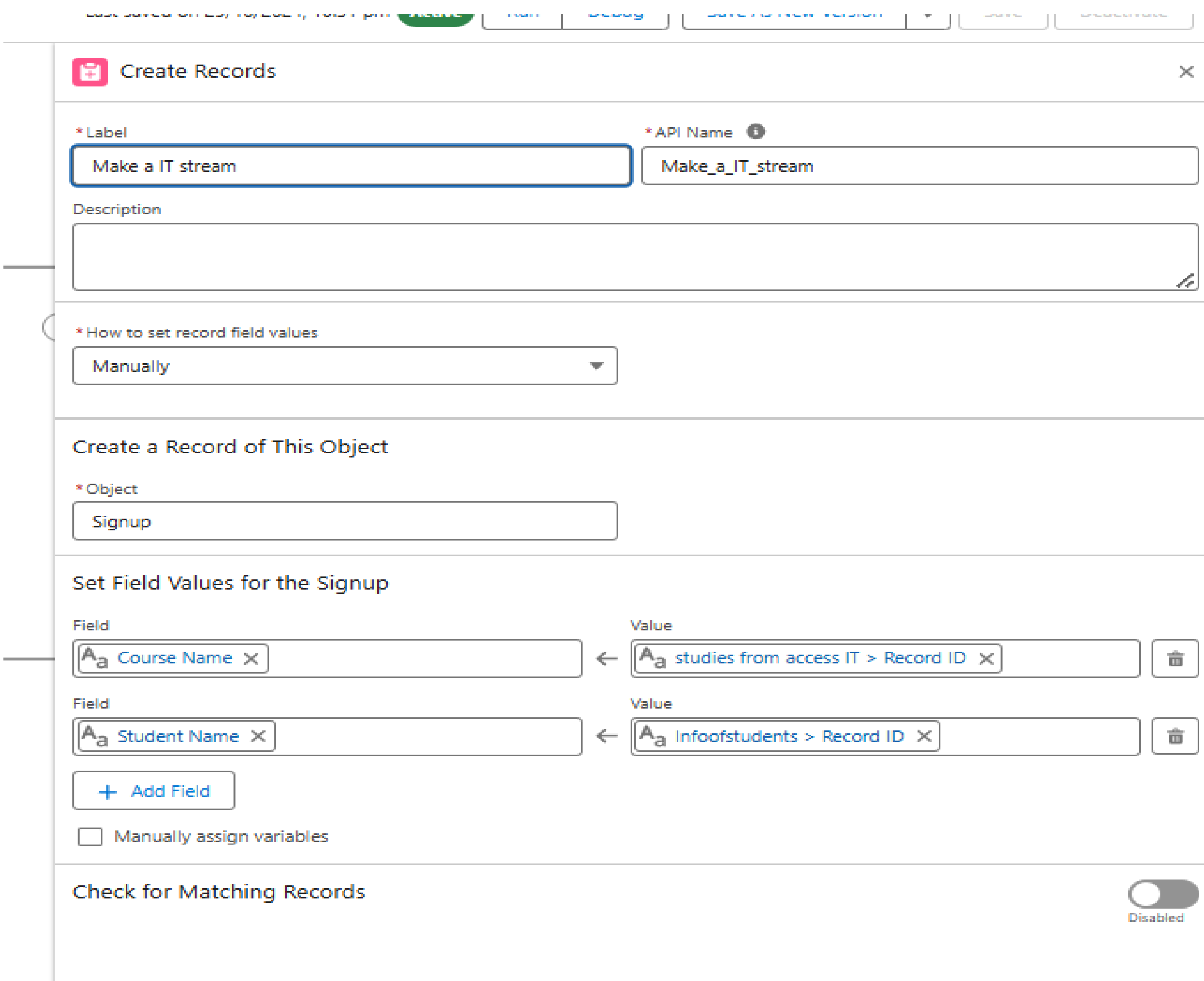
2.12 create record element

- ➤ Under the took CSE path, create a record element.
- ➤ label it as make a CSE stream.
- ➤ Give the object as signup and place the following field values:
  field1: Course Name ; value1: studies from access CSE.Record ID
  field1: Student Name ; value1: infoofstudents.Record ID
- ➤ Click on save.



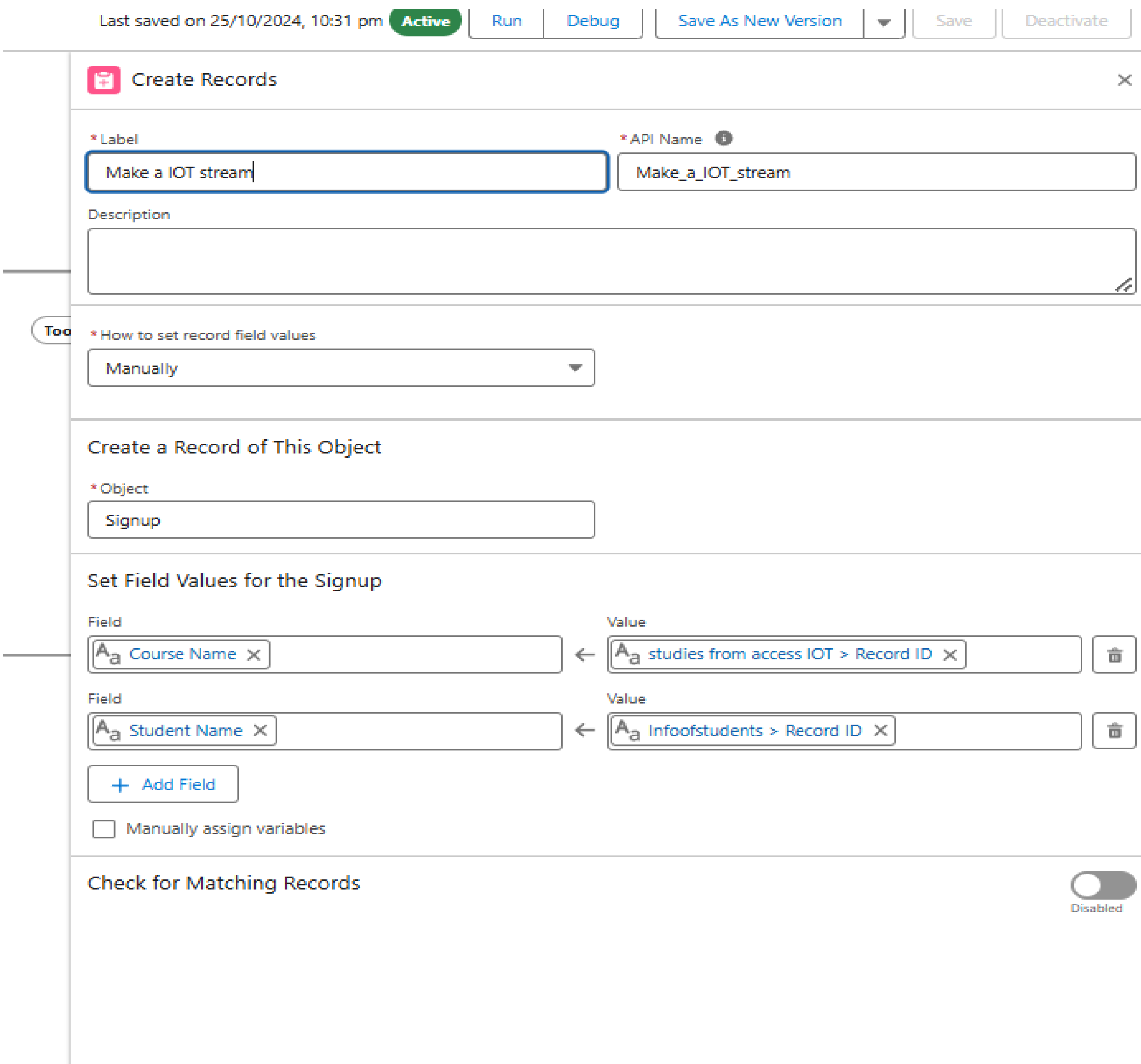
2.13 create record element

- ➤ Under the took IT path, create a record element.
- ➤ label it as make a IT stream.
- ➤ Give the object as signup and place the following field values:
  field1: Course Name ; value1: studies from access IT.Record ID
  field1: Student Name ; value1: infoofstudents.Record ID
- ➤ Click on save.



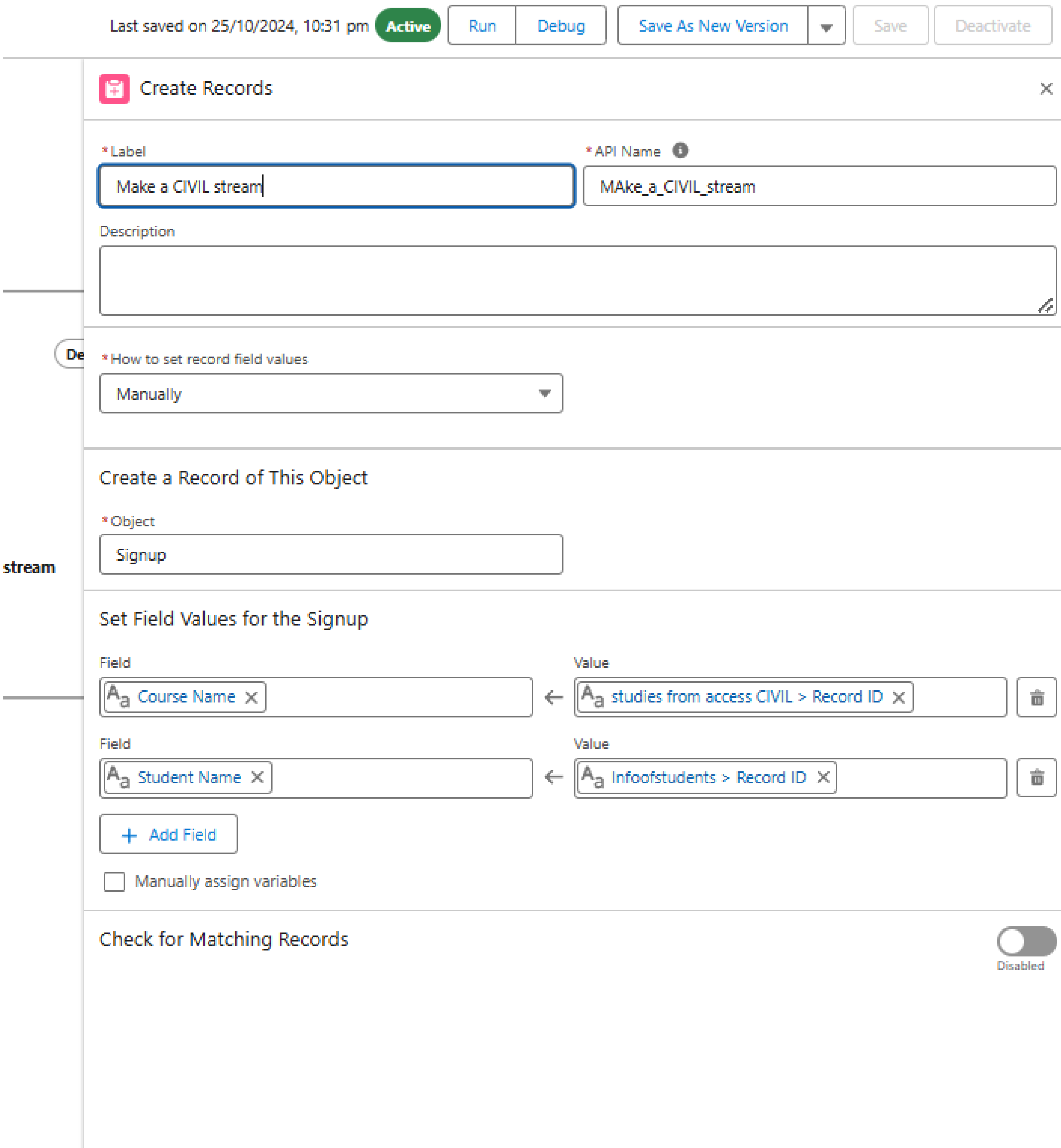
2.14 create record element

- Under the took IOT path, create a record element.
- label it as make a IOT stream.
- Give the object as signup and place the following field values:
  field1: Course Name ; value1: studies from access IOT.Record ID
  field1: Student Name ; value1: infoofstudents.Record ID
- Click on save.



2.15 create record element

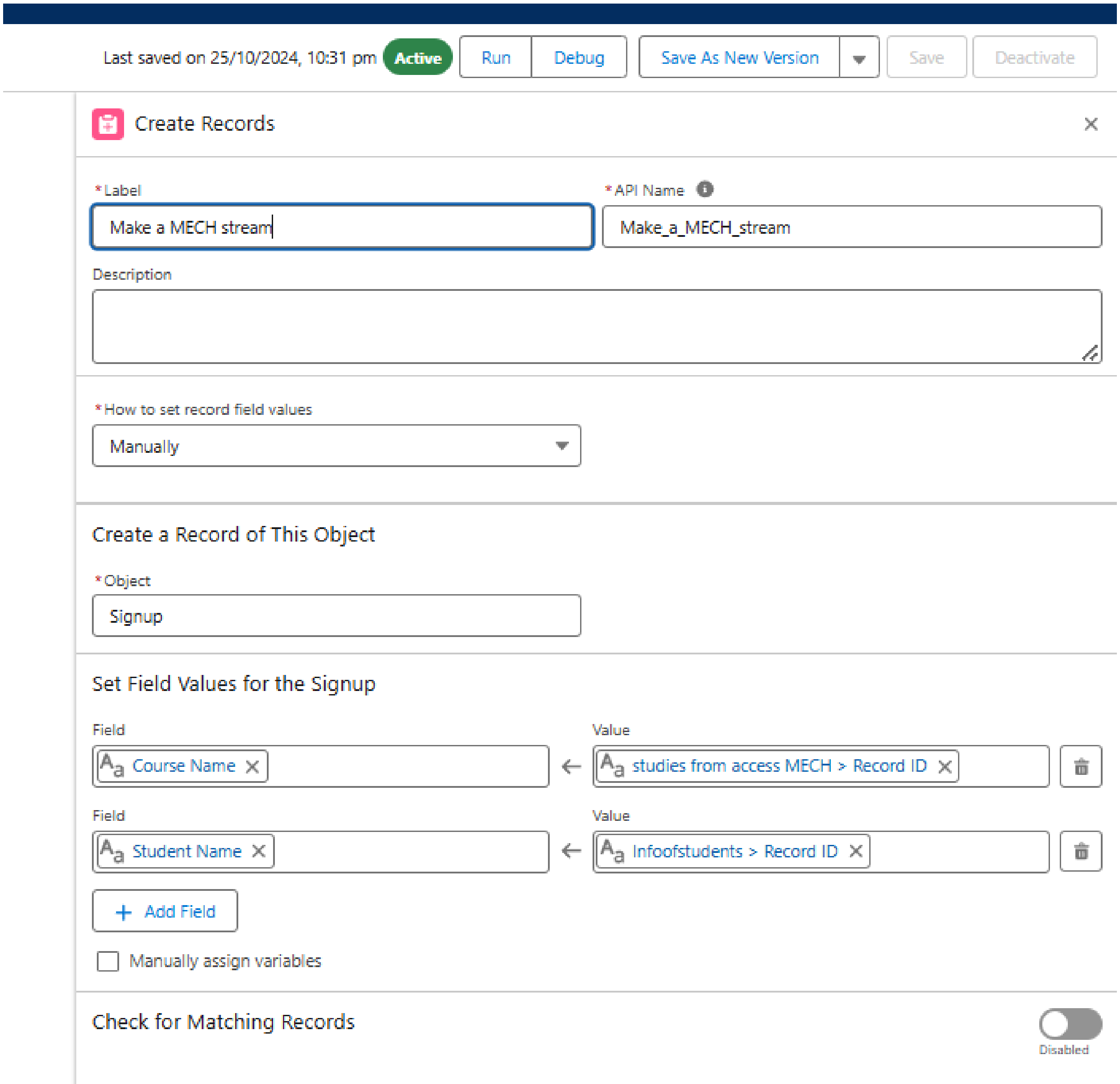
- Under the took CIVIL path, create a record element.
- label it as make a CIVIL stream.
- Give the object as signup and place the following field values:
  field1: Course Name ; value1: studies from access CIVIL.Record ID
  field1: Student Name ; value1: infoofstudents.Record ID
- Click on save.



2.16 create record element

- ➤ Under the took MECH path, create a record element.
- ➤ label it as make a MECH stream.
- ➤ Give the object as signup and place the following field values:
  field1: Course Name ; value1: studies from access MECH.Record ID
  field1: Student Name ; value1: infoofstudents.Record ID

➤ Click on save.



2.17 create record element

➤ Under the took BLOCKCHAIN path, create a record element.

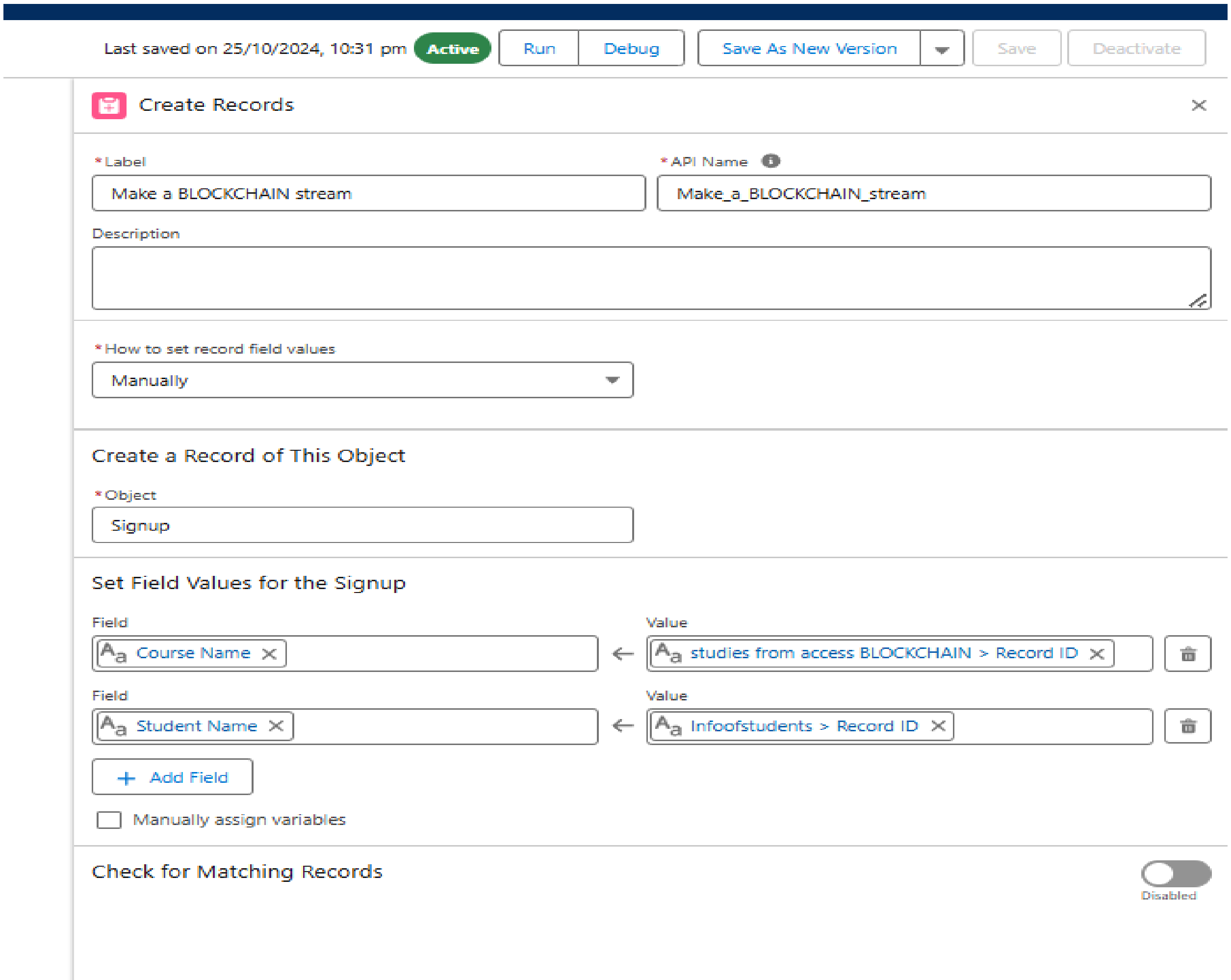
➤ label it as make a BLOCKCHAIN stream.

➤ Give the object as signup and place the following field values:

field1: Course Name ; value1: studies from access BLOCKCHAIN.Record ID

field1: Student Name ; value1: infoofstudents.Record ID

➤ Click on save.



2.18 create email template

- Go to the top left sode corner , go to toggle box.
- click on new resource.
- select the text template.
- Give the API name as Successfulstreambookingmailtemp.
- In the Body place , write the below text

  Dear {!Infoofstudents.Name},

  Congratulations and welcome to InstitutionstreamBooking!

  We are delighted to inform you that your booking 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 advisarial things.

  At InstitutionstreamBooking, we understand the importance of your academic and career goals, and we are committed to provide our support to you and perfect guidance throughout your journey.Here are a few key points to help you get started:

Explore the Institution : Take some time to explore our institution and services we are providing to students .

Connect with Our Advisors: Our team of experienced advisors is here to assist you at each and every stage of your educational aspects including admissions, abroad study, subject regarding ,etc... 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 InstitutionstreamBooking. We'll ensure that you're informed about the latest developments and relevant information to support your journey.

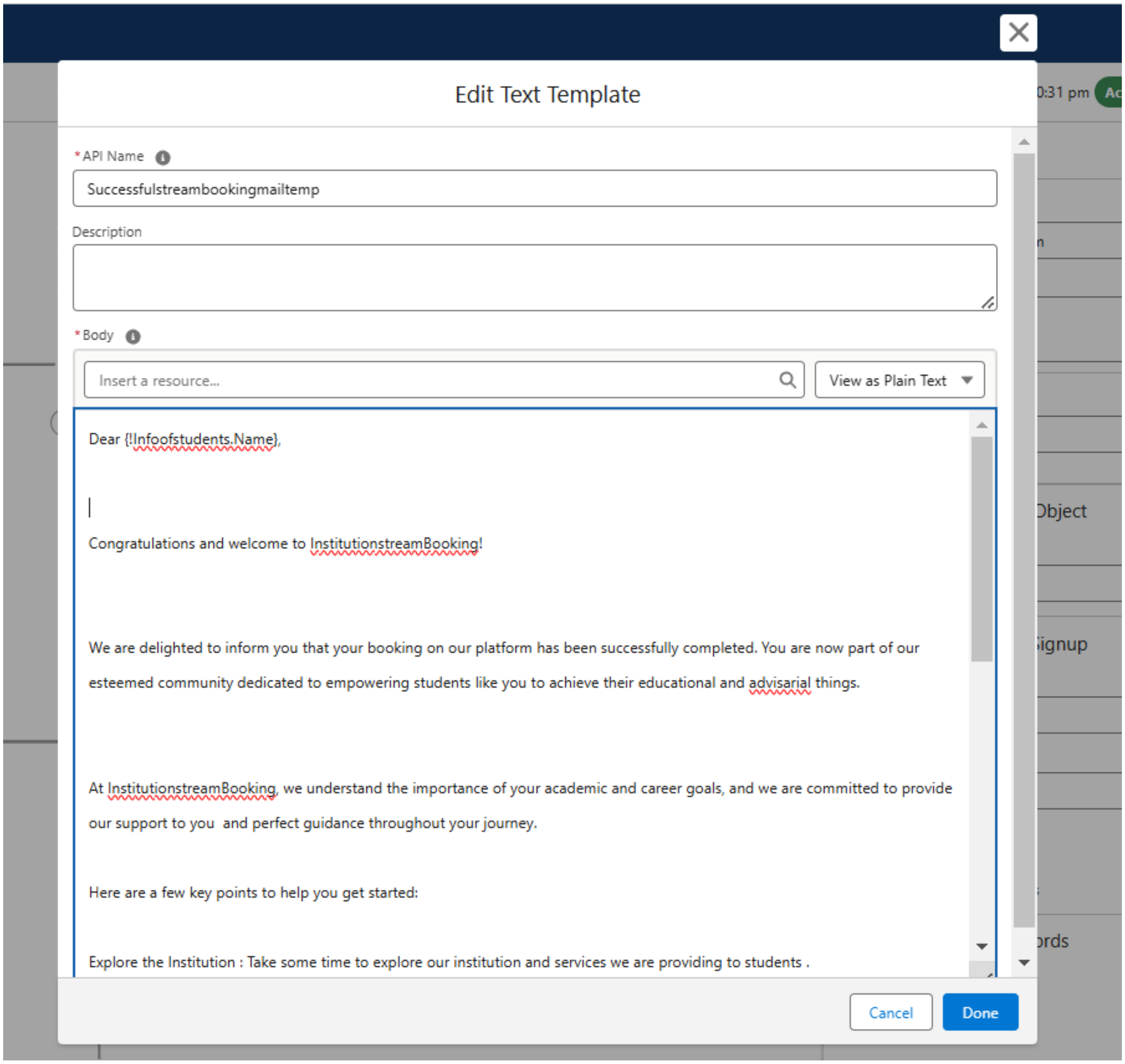
Connect to the expertise : Join our vibrant community of students, professionals, and experts who share your passion for education and global opportunities. Connect with like-minded individuals, participate in discussions, and expand your network.

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 InstitutionstreamBooking 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.

Thank you.

- click on done.



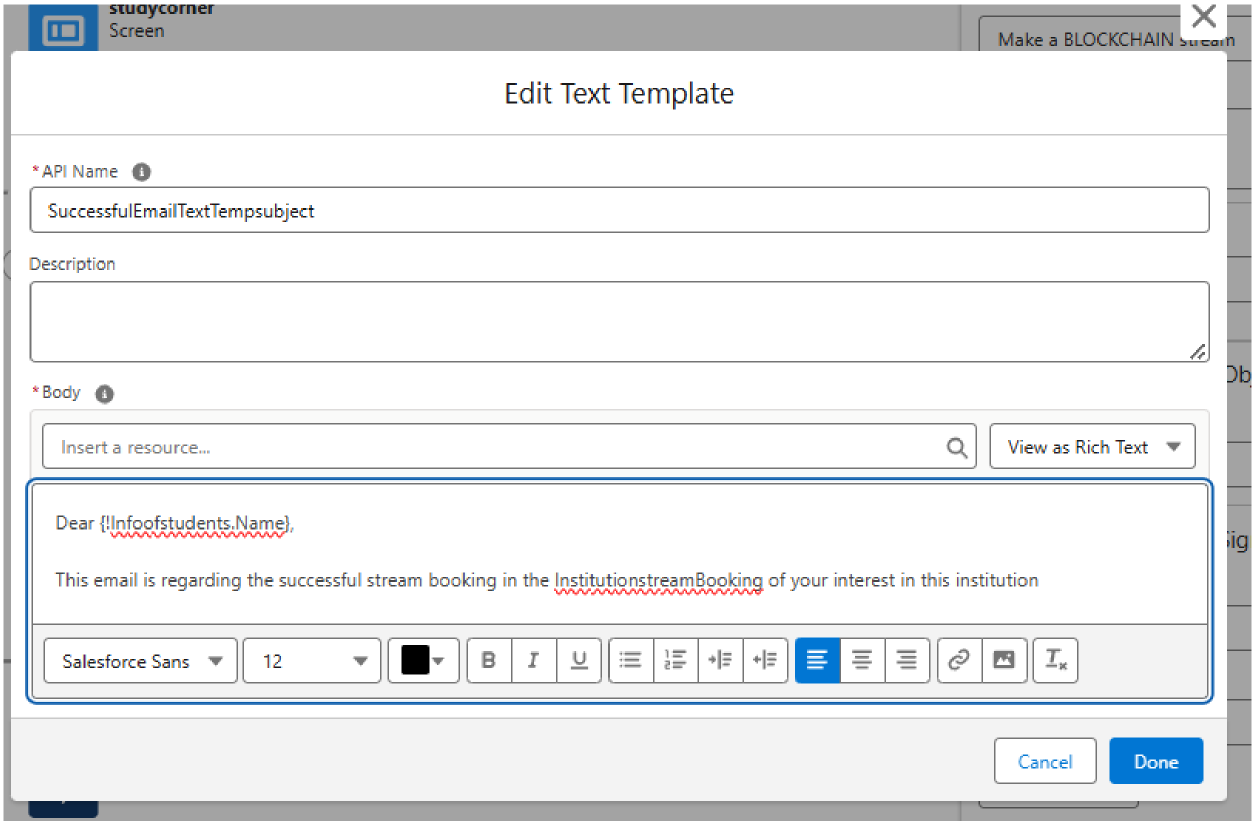
2.19 create email template

- ➤ Go to the top left sode corner , go to toggle box.
- ➤ click on new resource.
- ➤ select the text template.
- ➤ Give the API name as SuccessfulEmailTextTempsubject.

In the Body place , write the below text

Dear {!Infoofstudents.Name},

This email is regarding the successful stream booking in the InstitutionstreamBooking of your interest in this institution



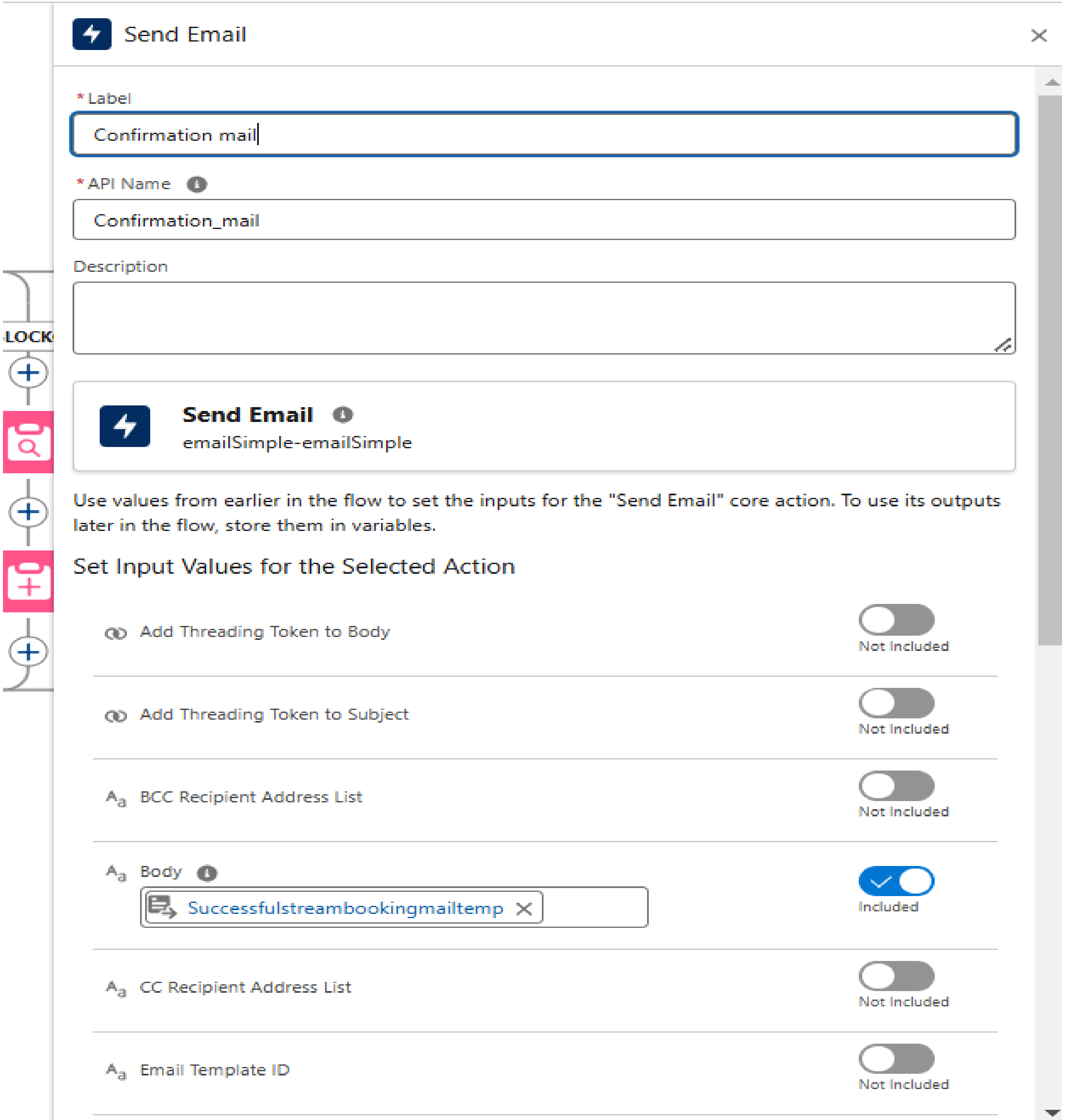
2.20 Add Action element

- ➤ After all the paths under the decision element, add an action element.
- ➤ give name as Confirmation mail.
- ➤ give the following input values for the select action:

  Body: Successfulstreambookingmailtemp

  Recipent Address List: infoofstudents.Email

  Subject: SuccessfulEmailTextTempsubject
- ➤ Click on save.

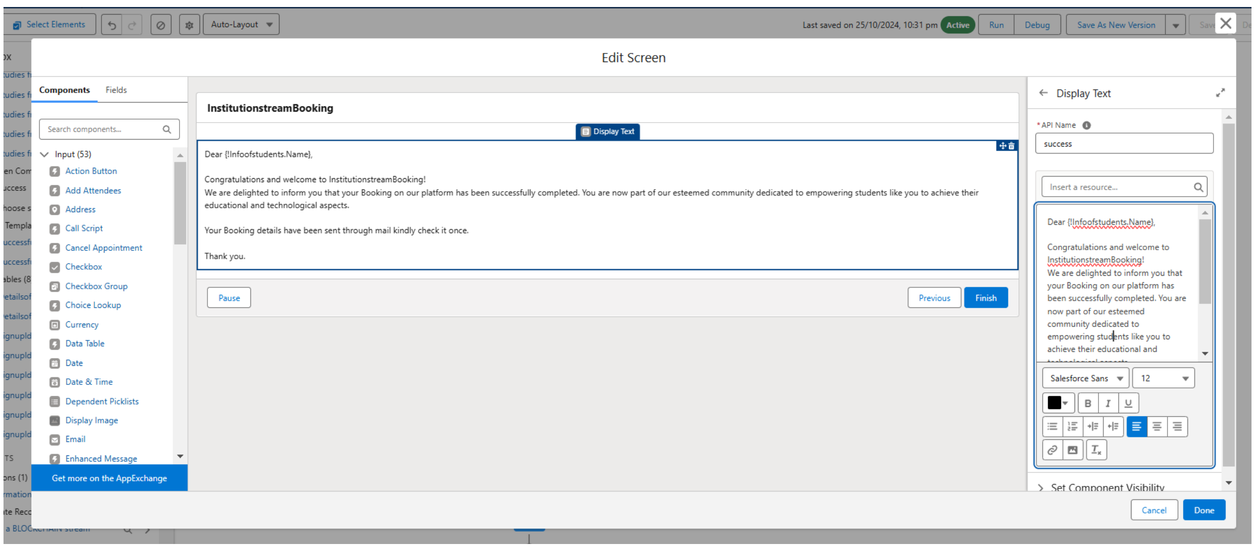


2.21 Add Action element

- ➤ After the confirmation action element,add the screen element.
- ➤ give name as perfectjob.
- ➤ In the left corner ,in the components, search display text.
- ➤ grab it on to the main screen.
- ➤ give name as success.
- ➤ In the body, give the below text:

Dear {!Infoofstudents.Name},
Congratulations and welcome to InstitutionstreamBooking!
We are delighted to inform you that your Booking 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 technological aspects.
Your Booking details have been sent through mail kindly check it once.
Thank you.

- click on done.



- Now click on save at the top right corner and give name as InstitutionstreamBooking.

TASK-3 Create a User and make suitable settings

3.1 Create a User

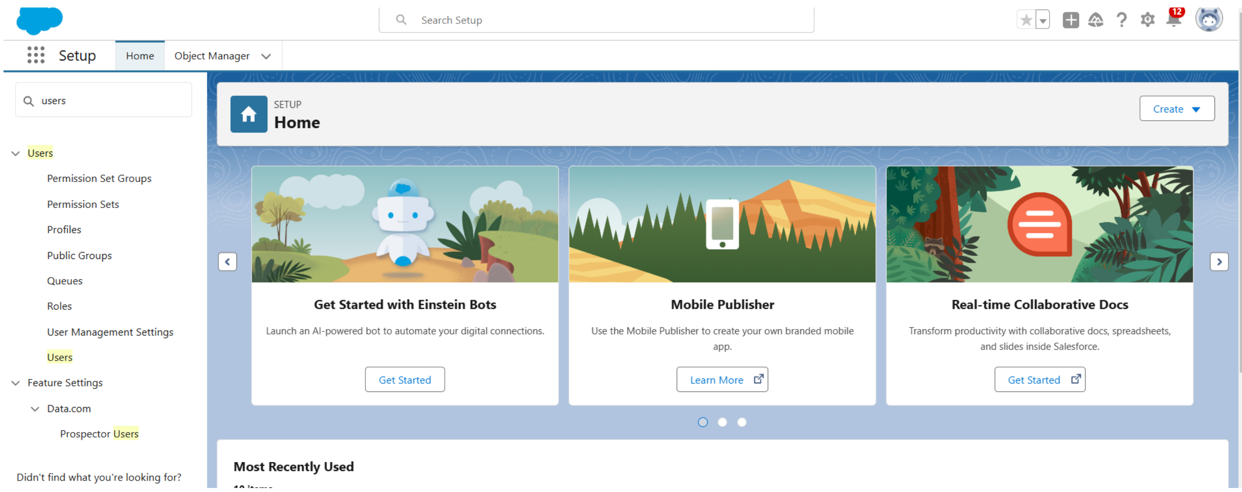
- In the setup , go to quick find box, search users.
- click on new user.
- give the following values:
  name : Advisor
  nickname: Advi
  mail : 2111IT010062@mallareddyuniversity.ac.in

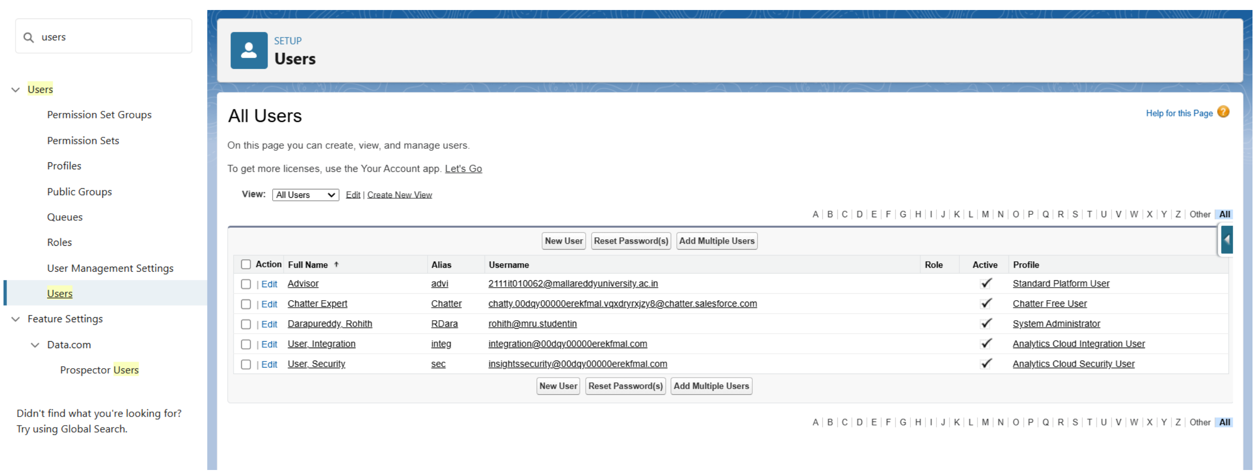
username: Advi@blue

License : Salesforce Platform

Profile : Standard Platform User

➤ click on save.





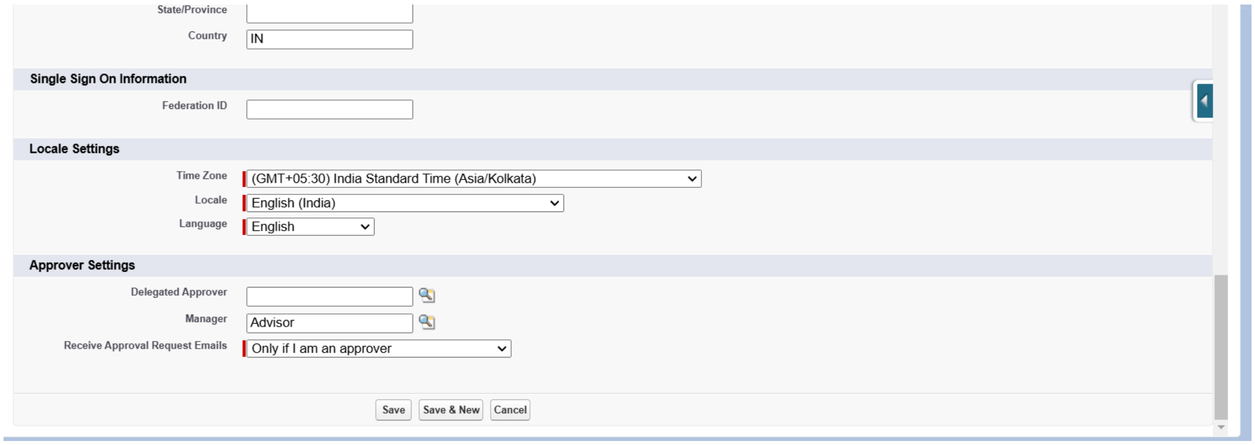
3.2 Configure the user settings

➤ In the setup , go to quick find box, search users.

➤ click on edit next to your name.

➤ scroll down to last , under approver settings,select advisor at manager.

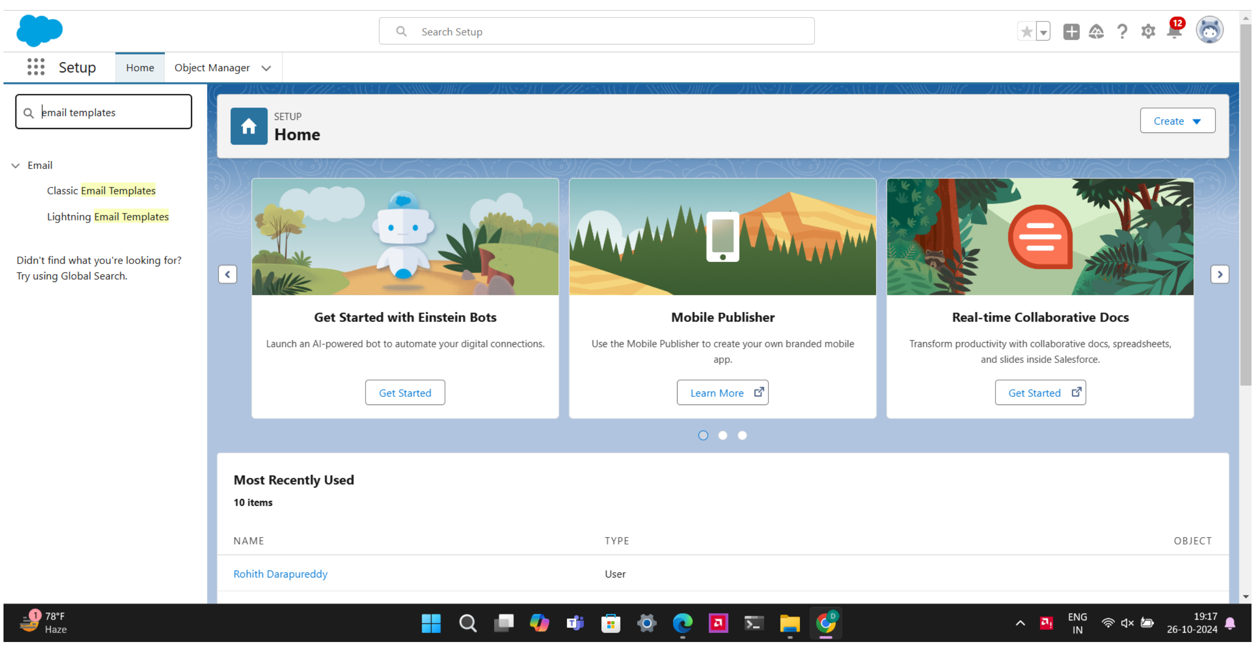
➤ click on save.

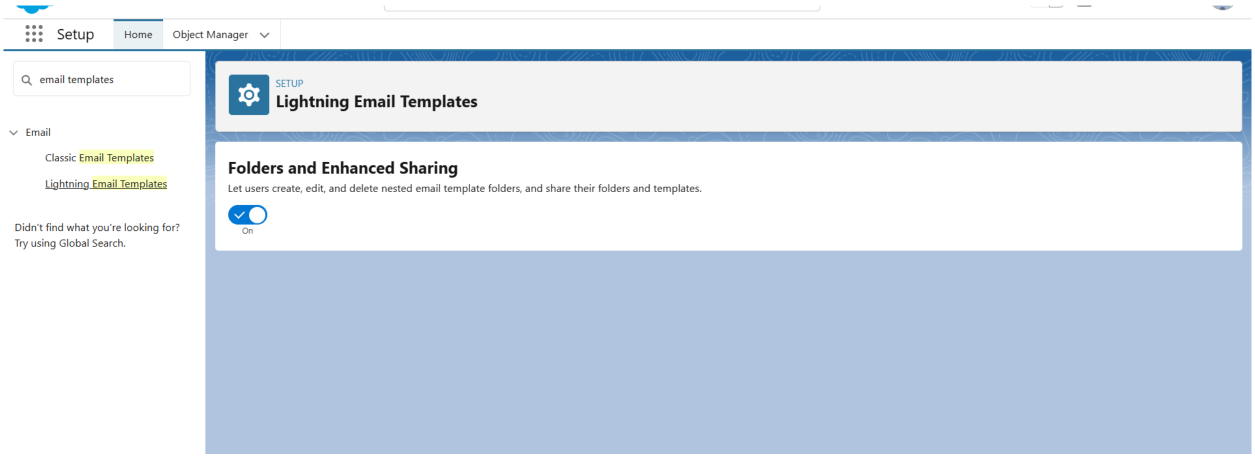


TASK-4 Creating Email Templates and Approval Processes

4.1 create email template

- ➤ In the setup , go to quick find box, search Email Templates.
- ➤ click on Lightning Email Templates.
- ➤ Under the folders and Enhanced sharing, turn on the toggle.





- Go to app launcher, search for Email templates.
- click on new folder, give email as a name to the folder.
- click on new email template.
- give confirmation template as the name for the email template
- select the folder as email.
- Write the below text in the message content:

Dear {{Booking__c.Student_Name__c}},

I hope this email finds you well. I am writing to confirm the details of our upcoming booking scheduled for {{Booking__c.Booking_Date_Time__c}} regarding {{Booking__c.SOP_Topic__c}}.

Booking Details:
Booking No: {{Booking__c.Name}}
Student Name: {{Booking__c.Student_Name__c}}
Advisor's Name: {{Booking__c.Advisors__c}}
Date & Time: {{Booking__c.Booking_Date_Time__c}}
Purpose: {{Booking__c.SOP_Topic__c}}

I want to assure you that I am looking forward to our meeting and am prepared to address any questions or concerns regarding {{Booking__c.SOP_Topic__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 specific topics or questions to discuss during our appointment, please feel free to share them in advance to ensure our time together is as productive as possible.

If you need to reschedule or cancel, please notify me at your earliest convenience to make alternative arrangements.

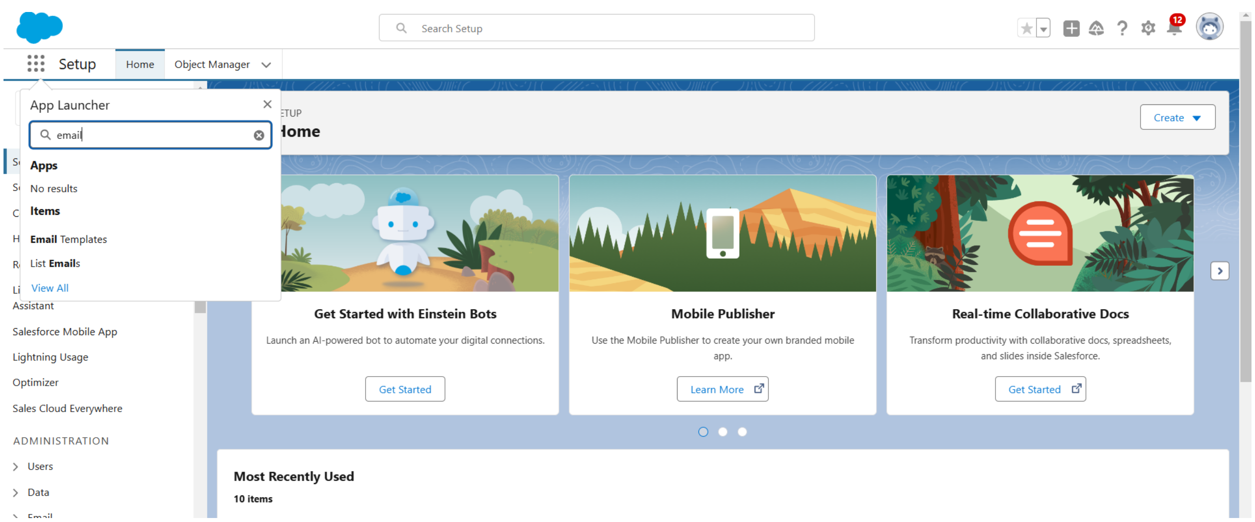
Thank you for choosing to work with me. I am confident our collaboration will lead to positive outcomes toward your goals.

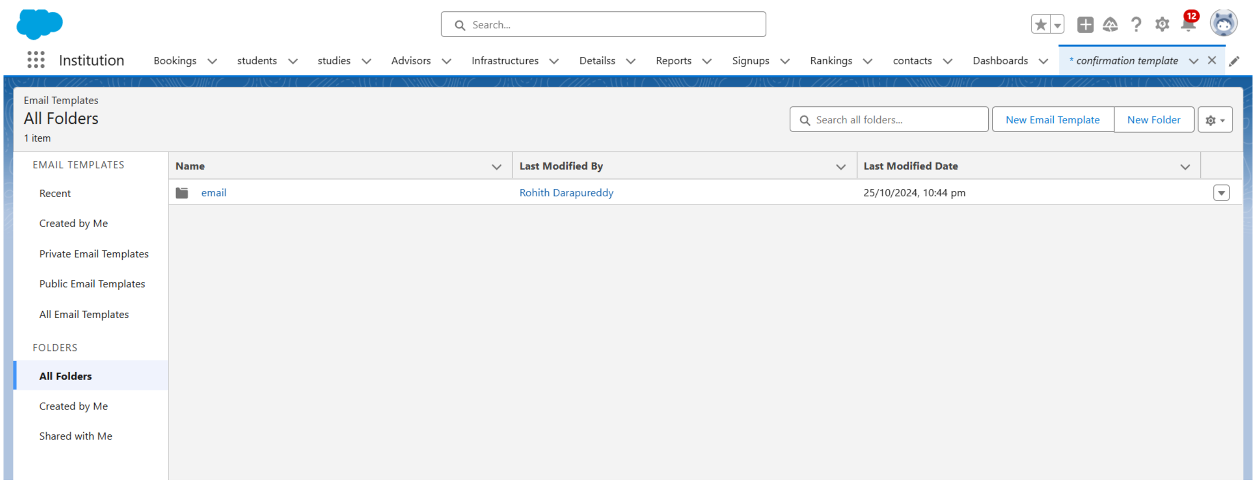
If you have any questions or require further information, please don't hesitate to reach out.

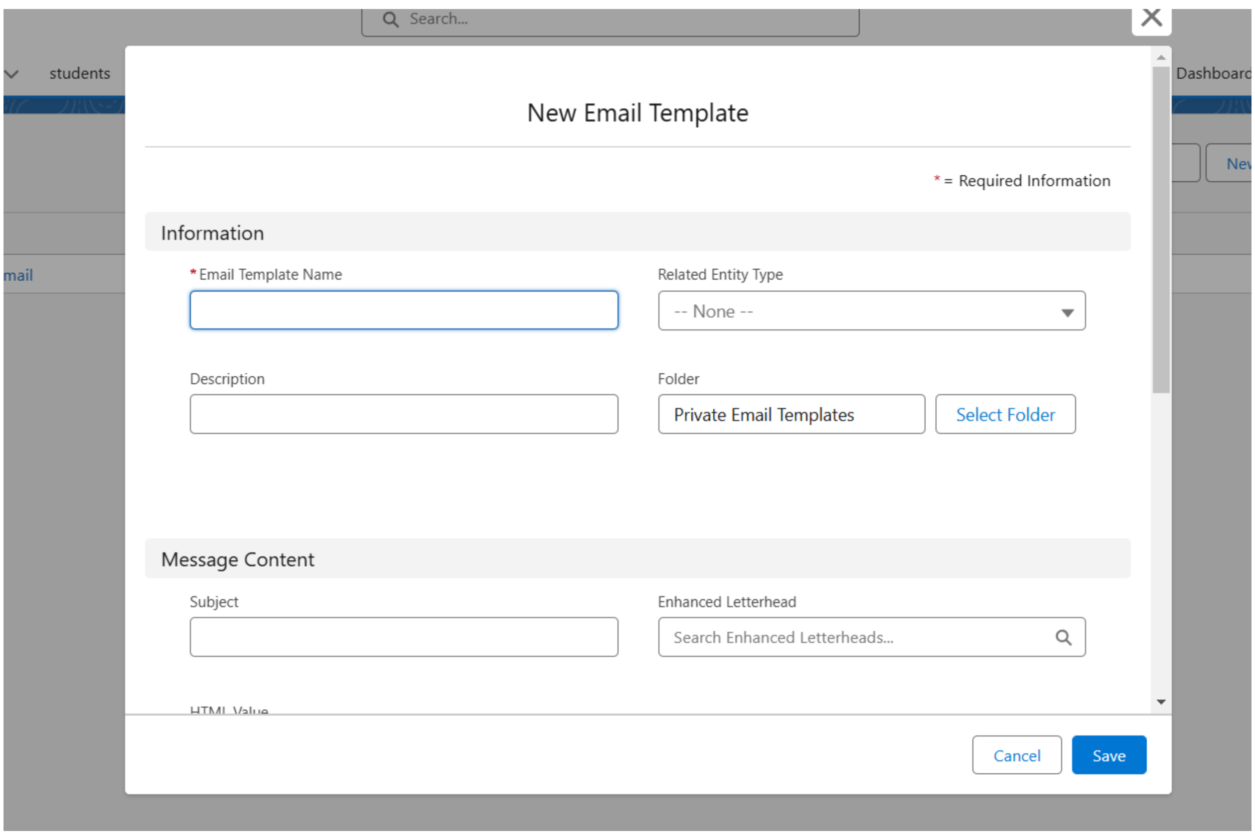
Looking forward to our meeting.

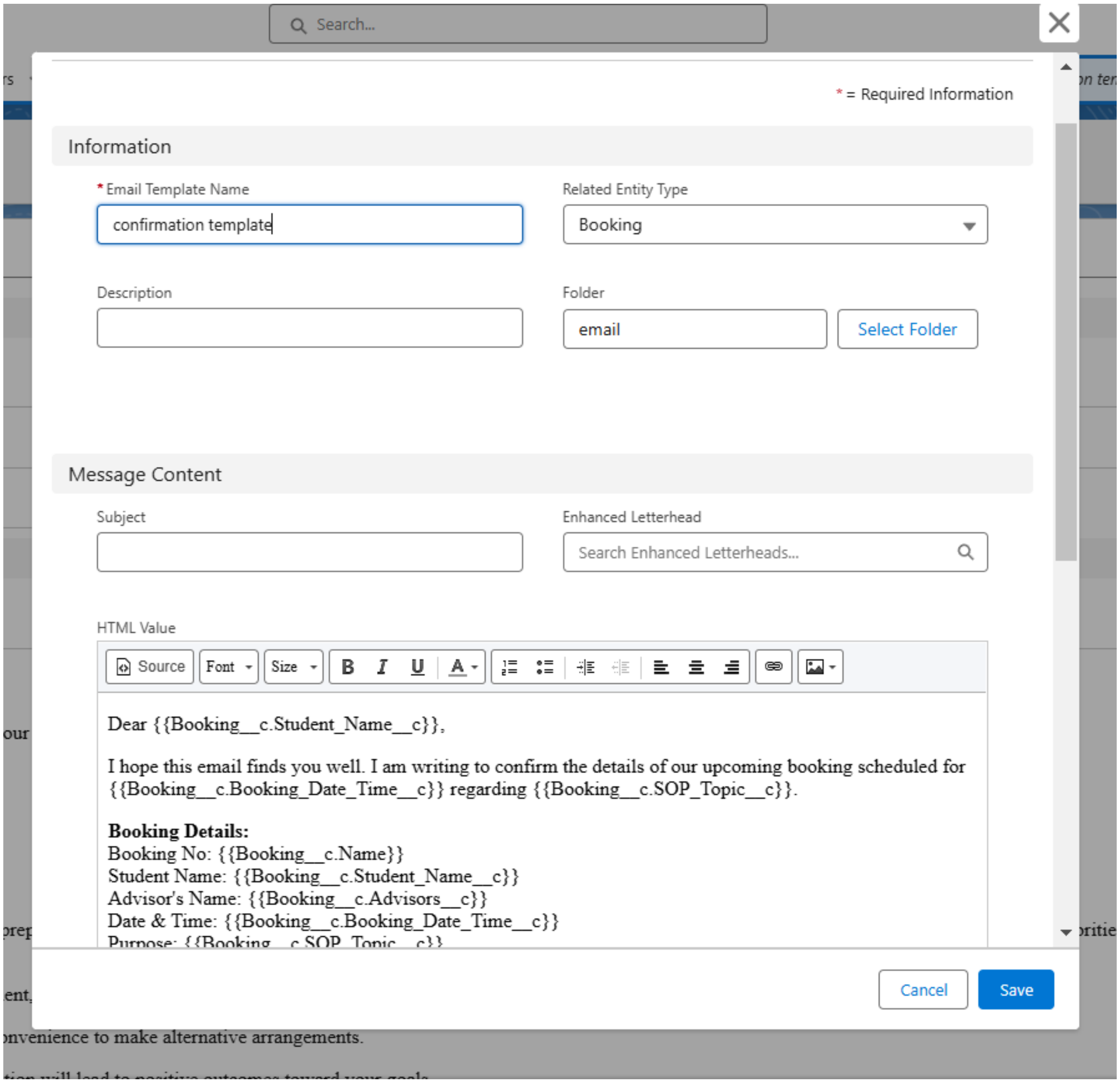
Best regards,

{{Recipient.Name}}
Institutionstream Booking




Institution
Bookings
students
studies
Advisors
Infrastructures
Detailss
Reports
Signups
Rankings
contacts
Dashboards
* confirmation template
Email Templates
All Folders
1 item
New Email Template
New Folder
EMAIL TEMPLATES
Recent
Created by Me
Private Email Templates
Public Email Templates
All Email Templates
FOLDERS
All Folders
Created by Me
Shared with Me
Name
Last Modified By
Last Modified Date
email
Rohith Darapureddy
25/10/2024, 10:44 pm


New Email Template
* = Required Information
Information
* Email Template Name
Related Entity Type
-- None --
Description
Folder
Private Email Templates
Select Folder
Message Content
Subject
Enhanced Letterhead
Search Enhanced Letterheads...
Cancel
Save



- click on save.

4.2 create email template

- click on new email template.
- give approval template as the name for the email template
- select the folder as email.
- Write the below text in the message content:

Dear {{Booking__c.Student_Name__c}},

I hope this email finds you well. I am writing to give you the message regarding the approval of your booking at {{Booking__c.Booking_Date_Time__c}} regarding

{{Booking__c.SOP_Topic__c}}.

Booking Details:
Booking No: {{Booking__c.Name}}
Student Name: {{Booking__c.Student_Name__c}}
Advisor's Name: {{Booking__c.Advisors__c}}
Date & Time: {{Booking__c.Booking_Date_Time__c}}
Purpose: {{Booking__c.SOP_Topic__c}}

I am very glad to have you on board with us and experiencing our prestegious instistution and i am eagerly waiting for our meeting and am prepared to address any questions or concerns regarding {{Booking__c.SOP_Topic__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 specific topics or questions to discuss during our interaction, please feel free to ask and enquire them so that you can have a better understanding about the institution and the services providing by the institution to the studnts.

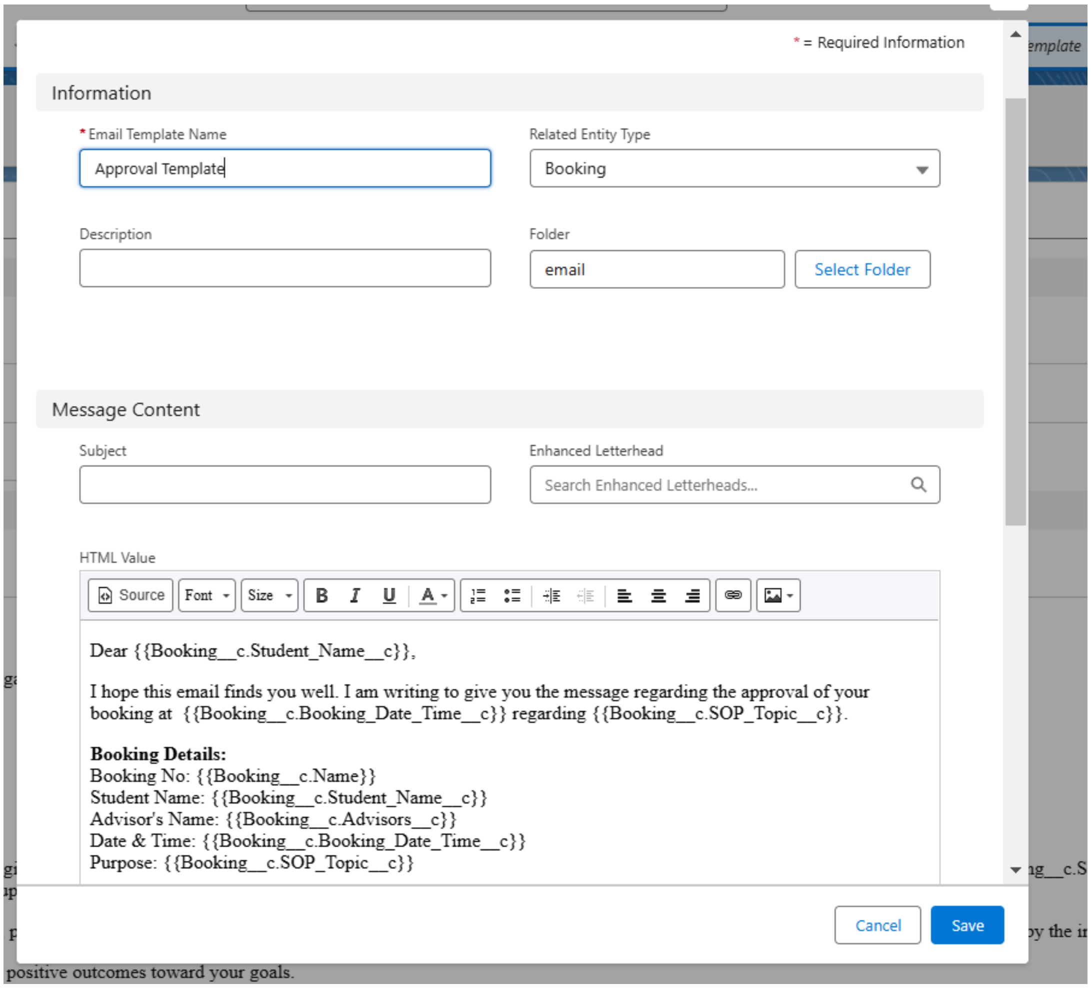
Thank you for choosing us. I am confident our collaboration will lead to positive outcomes toward your goals.

If you have any questions or require further information, please don't hesitate to reach out.

Looking forward to our meeting.

Best regards,

{{Recipient.Name}}
Institutionstream Booking



4.3 create email template

- ➤ click on new email template.
- ➤ give rejection template as the name for the email template
- ➤ select the folder as email.

Write the below text in the message content:

Dear {{Booking__c.Student_Name__c}},

I hope this email finds you well. I am writing this email to convey yo that your request has been cancelled due to some issues.

Booking Details:
Booking No: {{Booking__c.Name}}
Student Name: {{Booking__c.Student_Name__c}}
Advisor's Name: {{Booking__c.Advisors__c}}

Date & Time: {{Booking__c.Booking_Date_Time__c}}
Purpose: {{Booking__c.SOP_Topic__c}}

A small issue has been occurred so that there is a rejection of your booking regarding {{Booking__c.SOP_Topic__c}}.

I suggest you to check all the necessary things and make a book again.

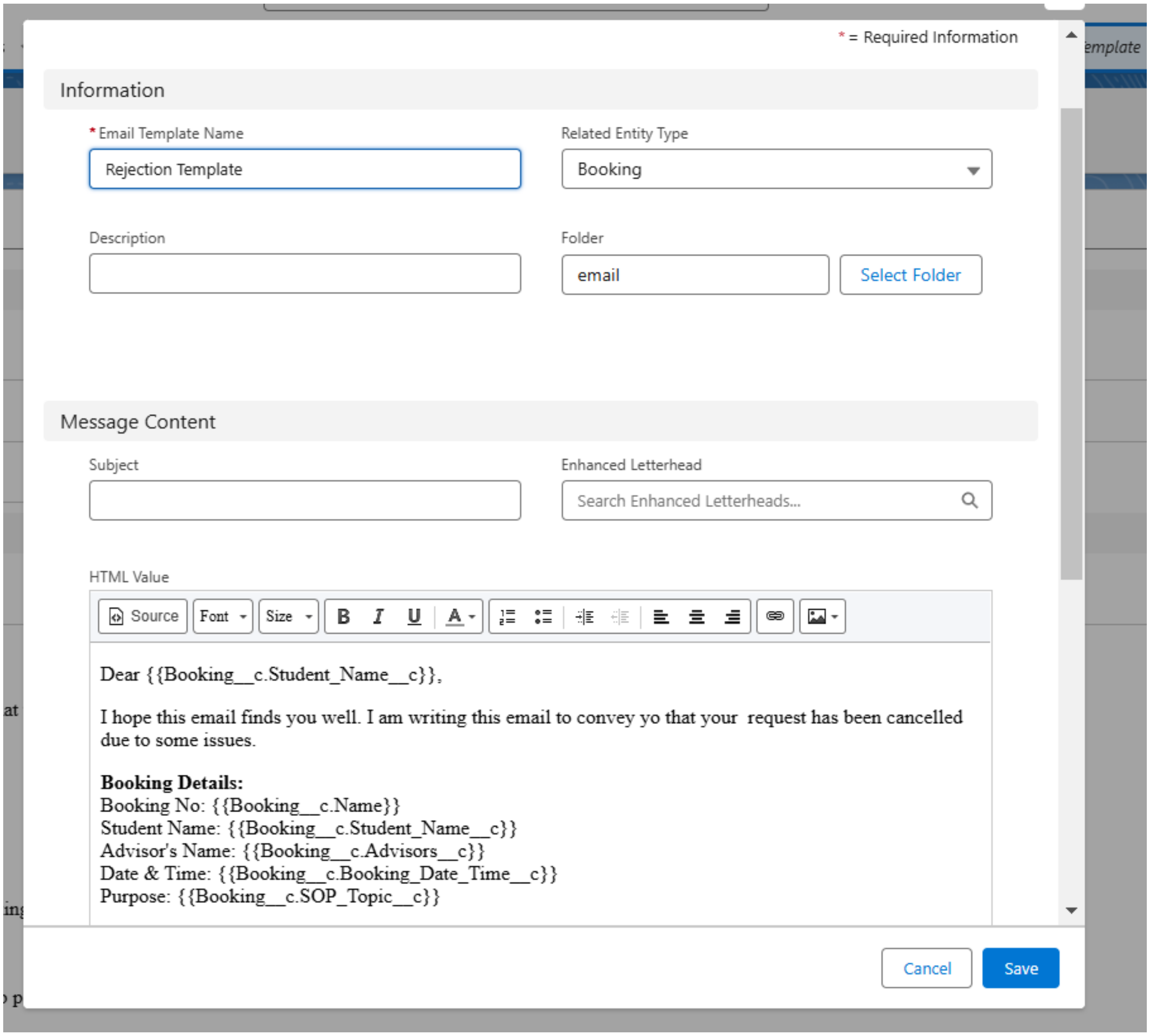
Thank you for choosing us. I am confident our collaboration will lead to positive outcomes toward your goals.

If you have any questions or require further information, please don't hesitate to reach out.

Looking forward to our meeting.

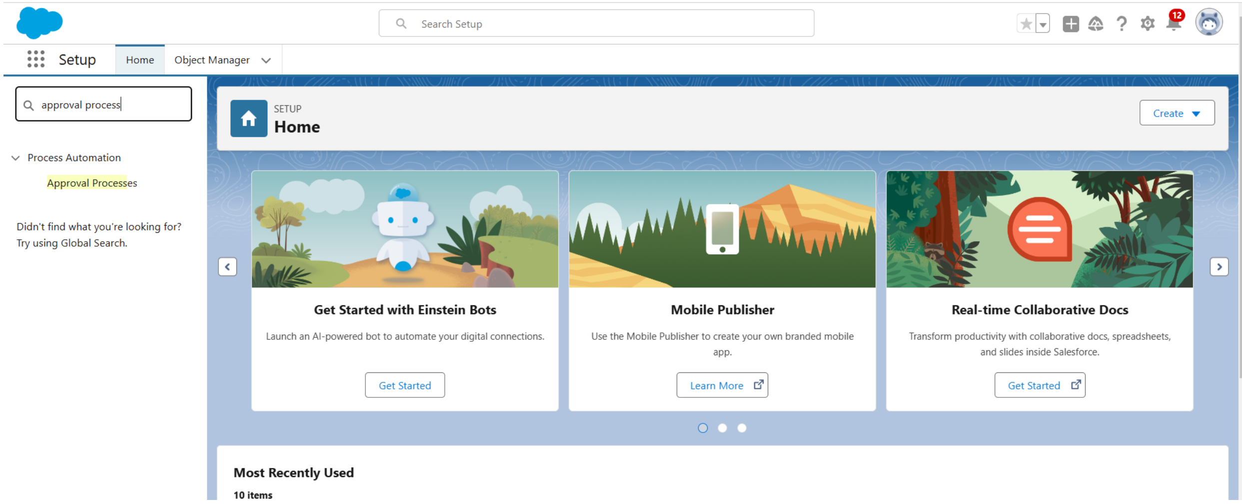
Best regards,

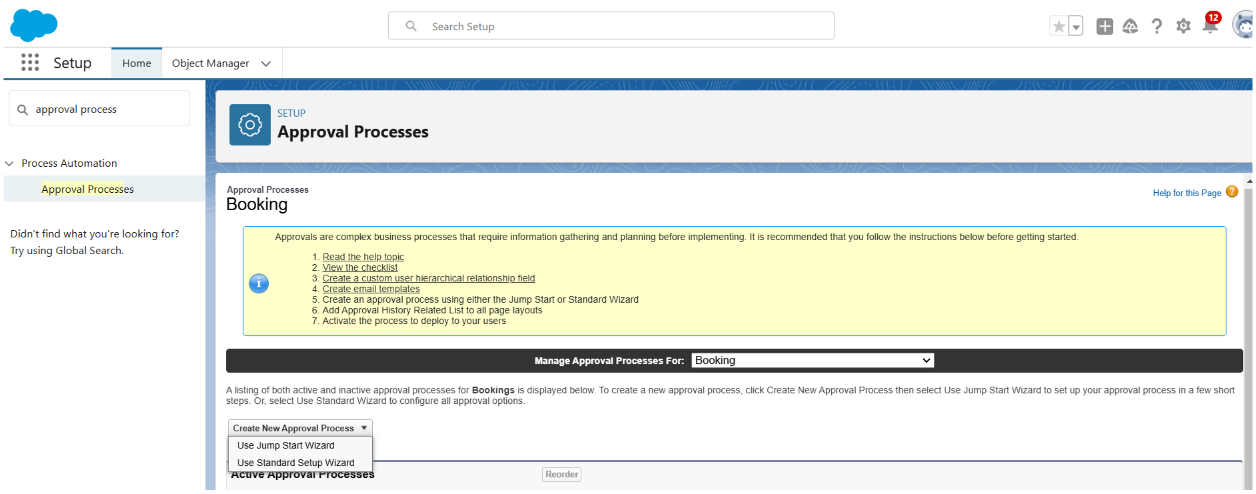
{{Recipient.Name}}
Institutionstream Booking



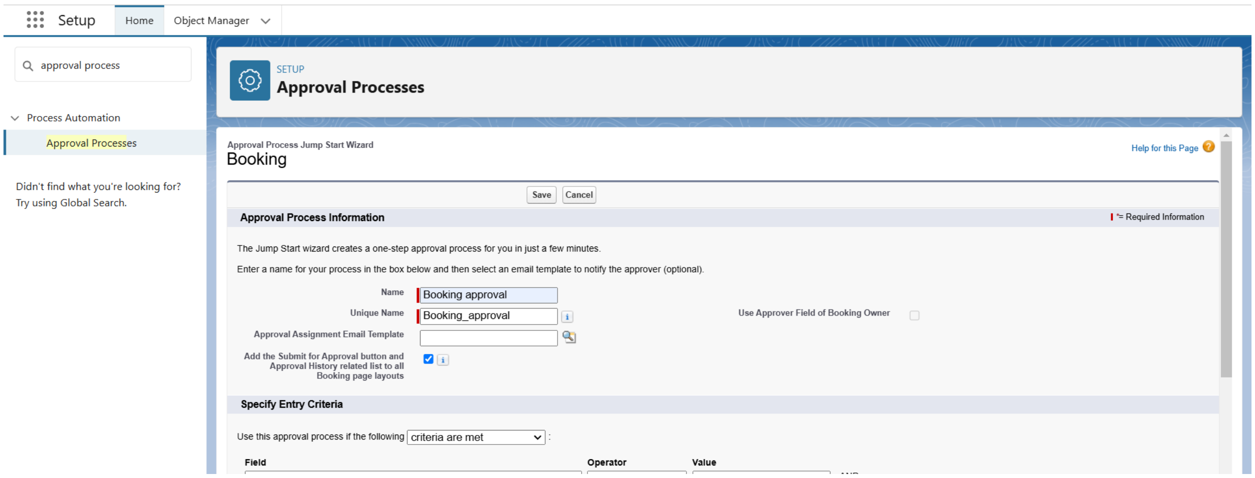
4.4 create an approval process

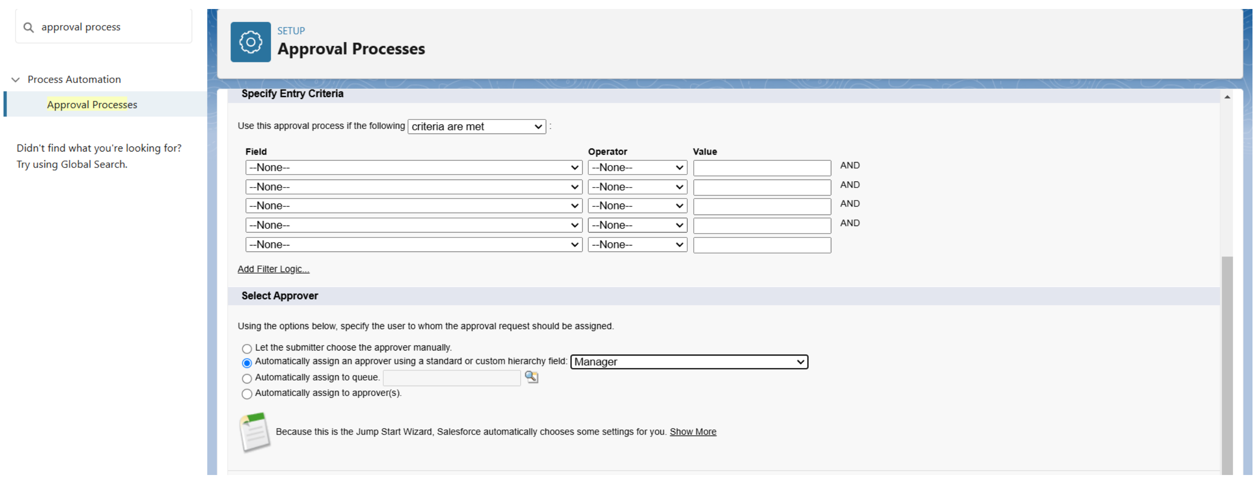
- In the quick find box, search for approval processes.
- click on the approval processes,In manage approval process for selct Booking.
- click on create new approval processes with the option using jump start wizard.

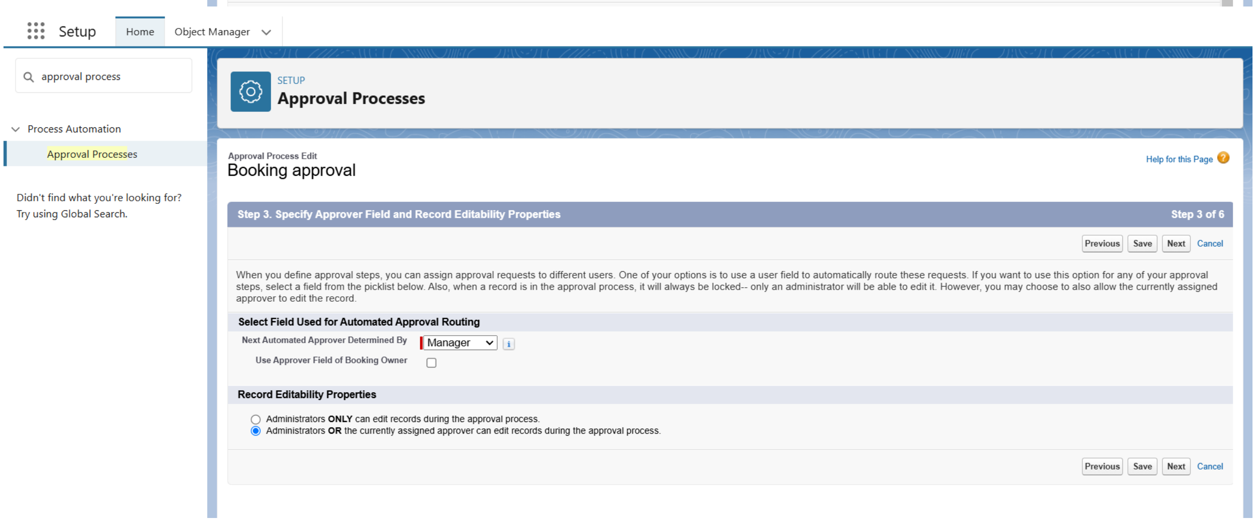




- ➤ Give name as Booking approval and scroll down.
- ➤ for the option Automatically assign the approver using a standard or custom hierarchy field, selct manager.
- ➤ click on save.
- ➤ Now click on edit which is beside the created approval process.
- ➤ now click on next,next.
- ➤ Then give Manager for Next Automated Approval determined by.
- ➤ Then in the Record Editability Settings, select Administrators OR the currently assigned approver can edit records during the approval process.
- ➤ click on next,next and save.



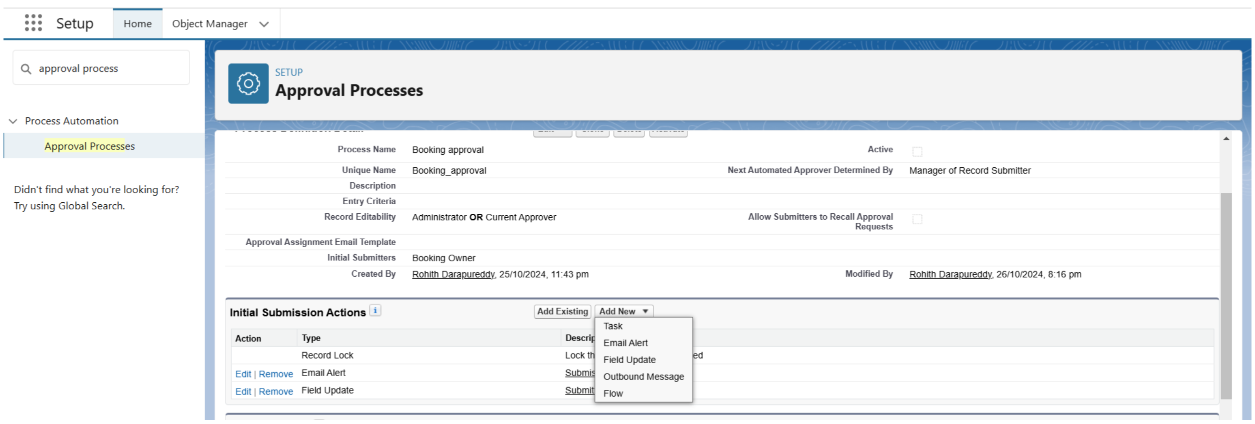


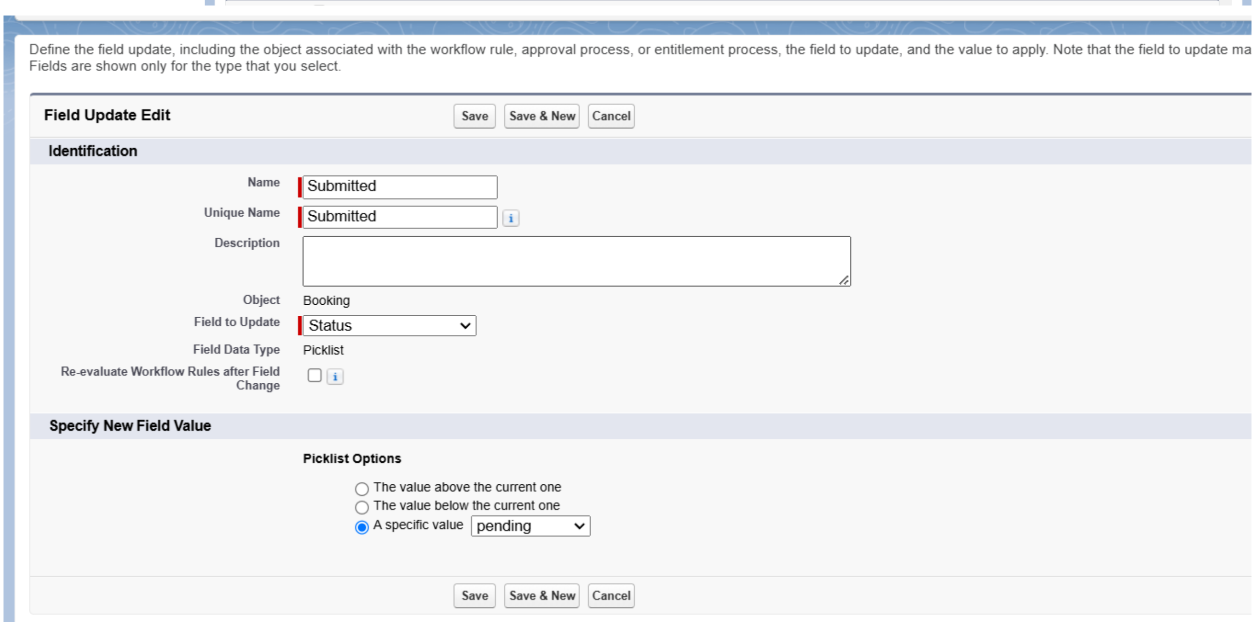


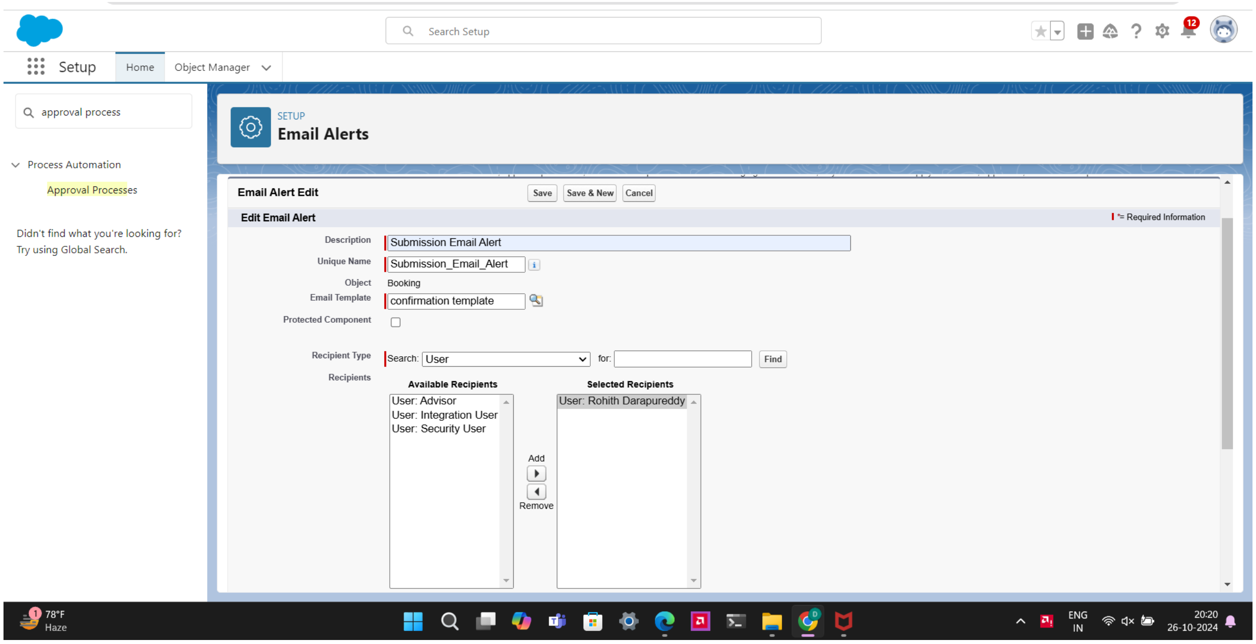
- ➤ click on the created approval process, go to intial submission actions.
- ➤ click on add new, select field update.
- ➤ give name submitted, field to update as status, piclist value as

pending and then click on save.

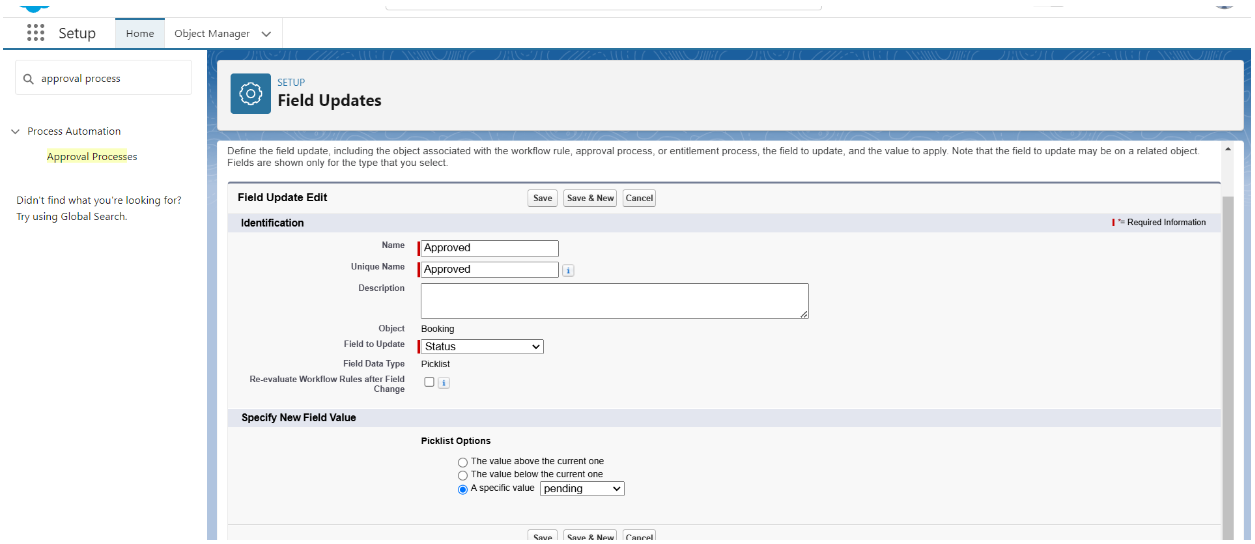
- click on add new under intial submission actions, select email alert.
- give name submission email alert.
- give email template as submission template under the classic email template of email folder.
- select your name from available requirements and add it to teh selected requirements.
- click on save.

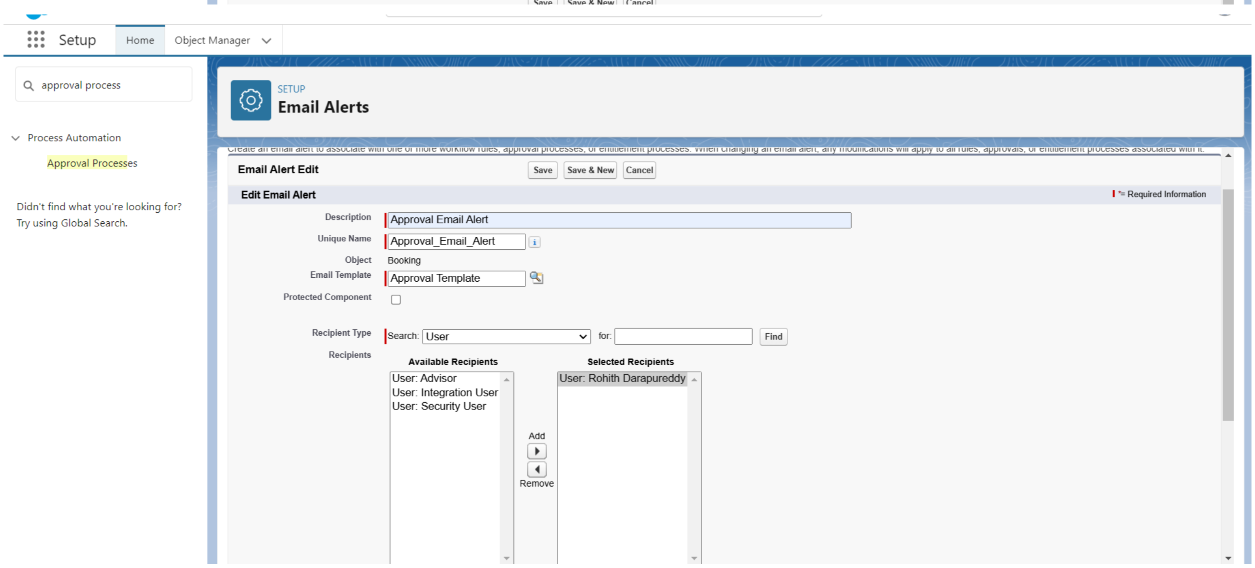




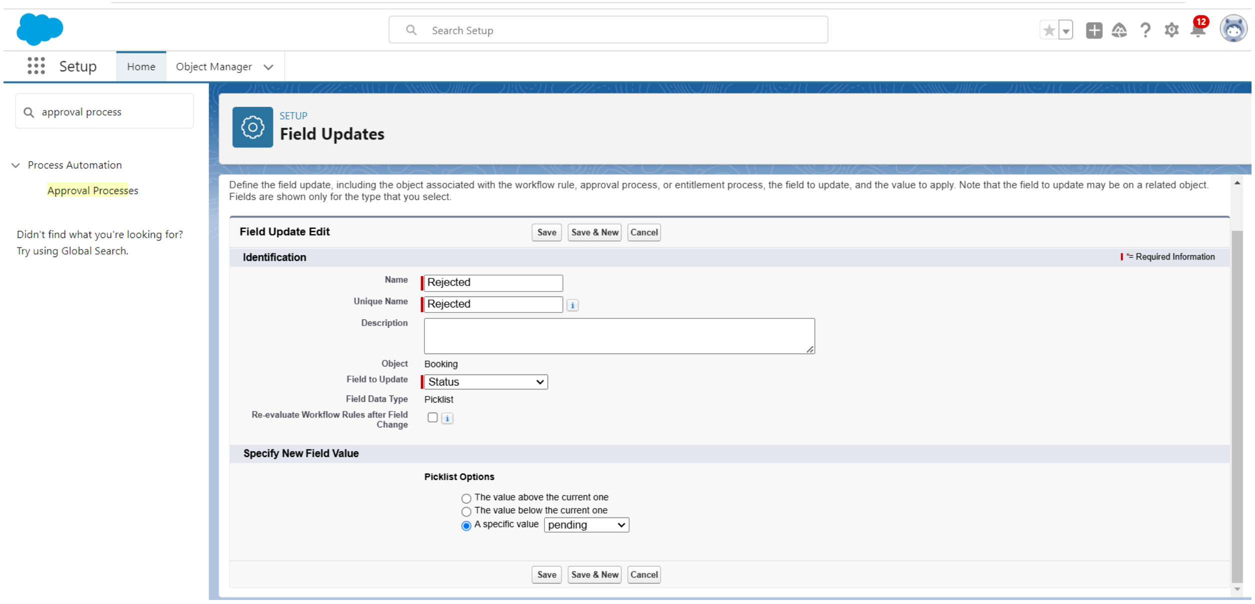


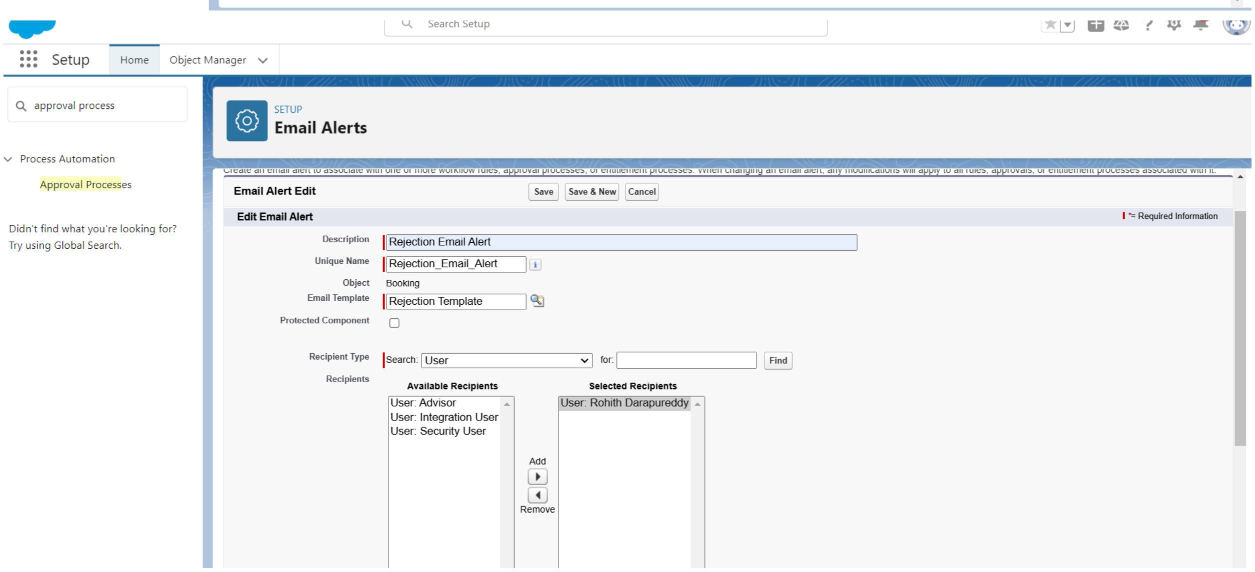
➤ click on the created approval process, go toFinal Approval actions.
➤ click on add new, select field update.
➤ give name Approved, field to update as status, piclist value as pending and then click on save.
➤ click on add new under Final Approval actions, select email alert.
➤ give name Approval email alert.
➤ give email template as Approval template under the classic email template of email folder.
➤ select your name from available requirements and add it to teh selected requirements.
➤ click on save.





- click on the created approval process, go to Final Rejection actions.
- click on add new, select field update.
- give name Rejected, field to update as status, piclist value as pending and then click on save.
- click on add new under Final Rejection actions, select email alert.
- give name Rejection email alert.
- give email template as Rejection template under the classic email template of email folder.
- select your name from available requirements and add it to teh selected requirements.
- click on save.

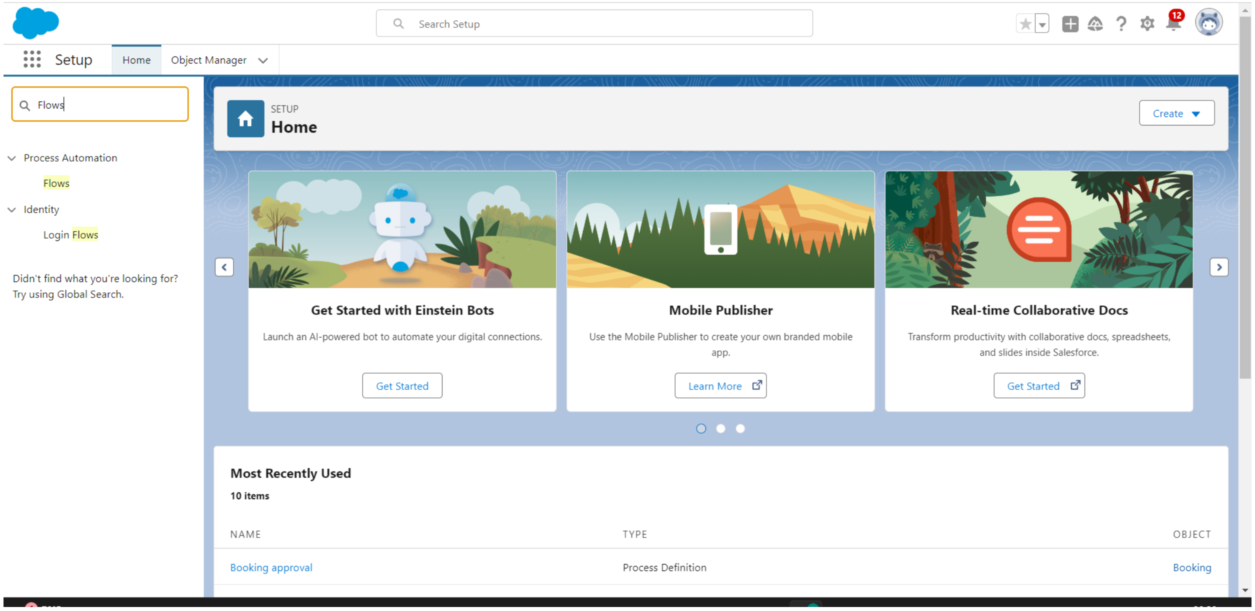


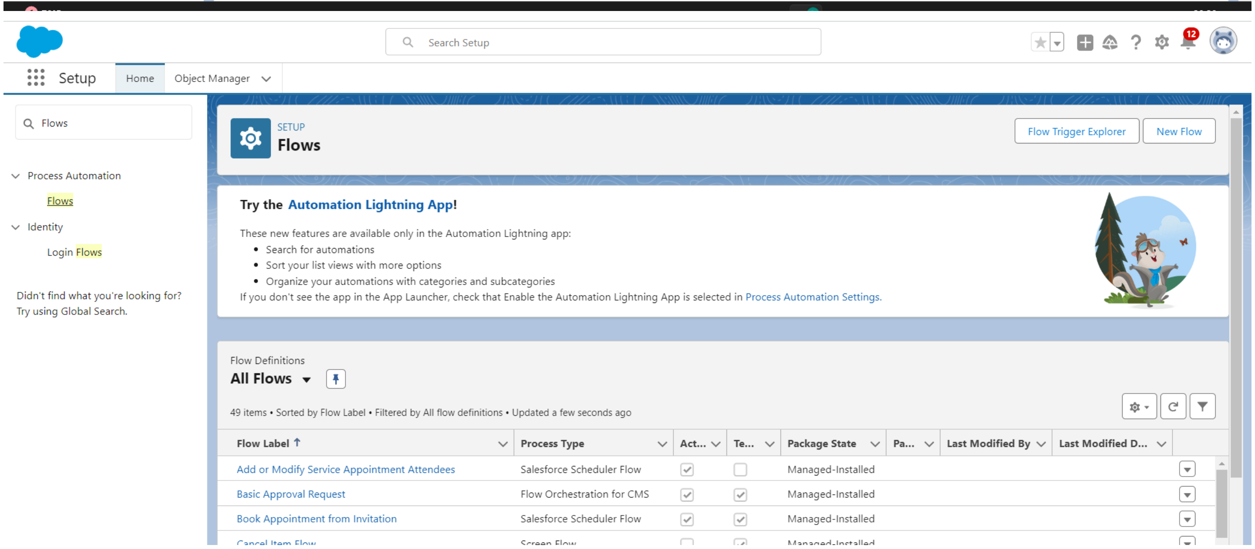


TASK-5 Record Triggered Flow Creation

5.1 create email template

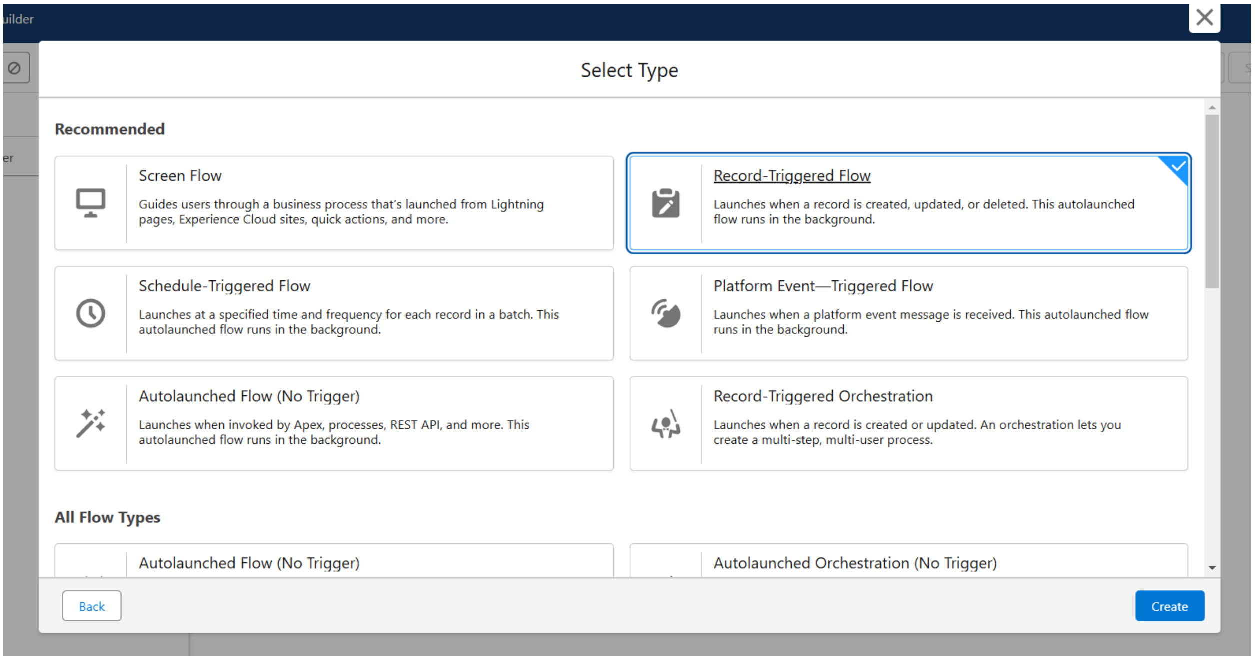
- ➤ Go to the quick find box, search for flows.
- ➤ click on flows, click on new flow, click on Record-Triggered Flow and click on create.
- ➤ The configure window opens.
- ➤ give Booking as object.

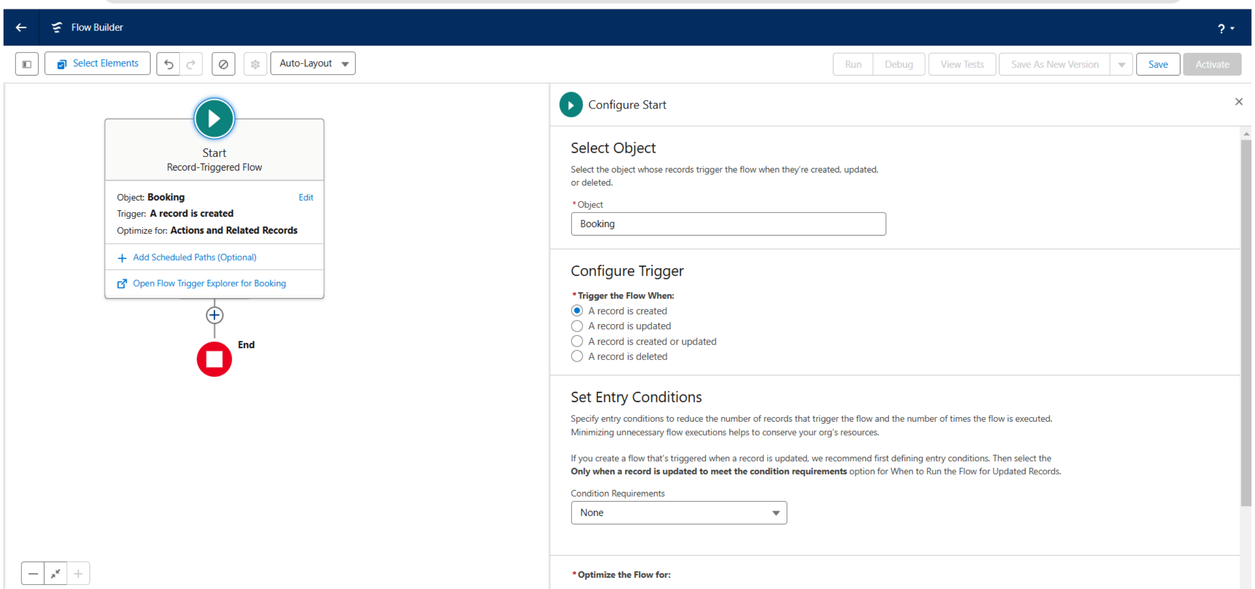


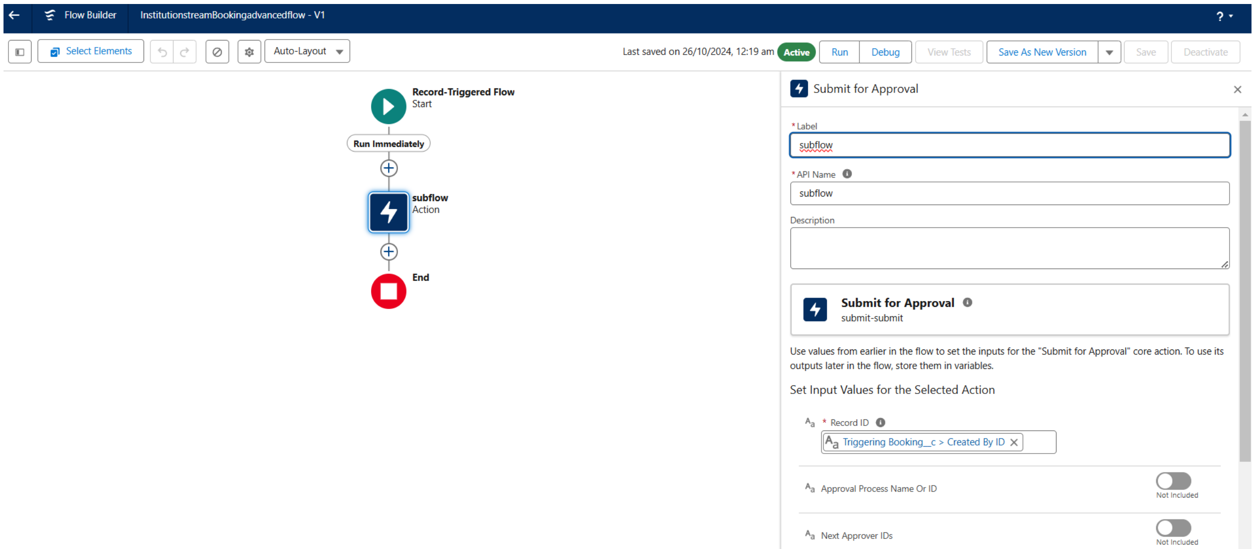


5.2 Add action element

- ➤ Add an action element after the start, give name as subflow.
- ➤ set Record.createdbyId value for the set inout values for the selected action field.
- ➤ click on save.
- ➤ click on save and give name as InstitutonstreamBookingadvancedflow.


Select Type
Recommended
Screen Flow
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
Record-Triggered Flow
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
Platform Event—Triggered Flow
Launches when a platform event message is received. This autolaunched flow runs in the background.
Autolaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.
Record-Triggered Orchestration
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.
All Flow Types
Autolaunched Flow (No Trigger)
Autolaunched Orchestration (No Trigger)
Back
Create

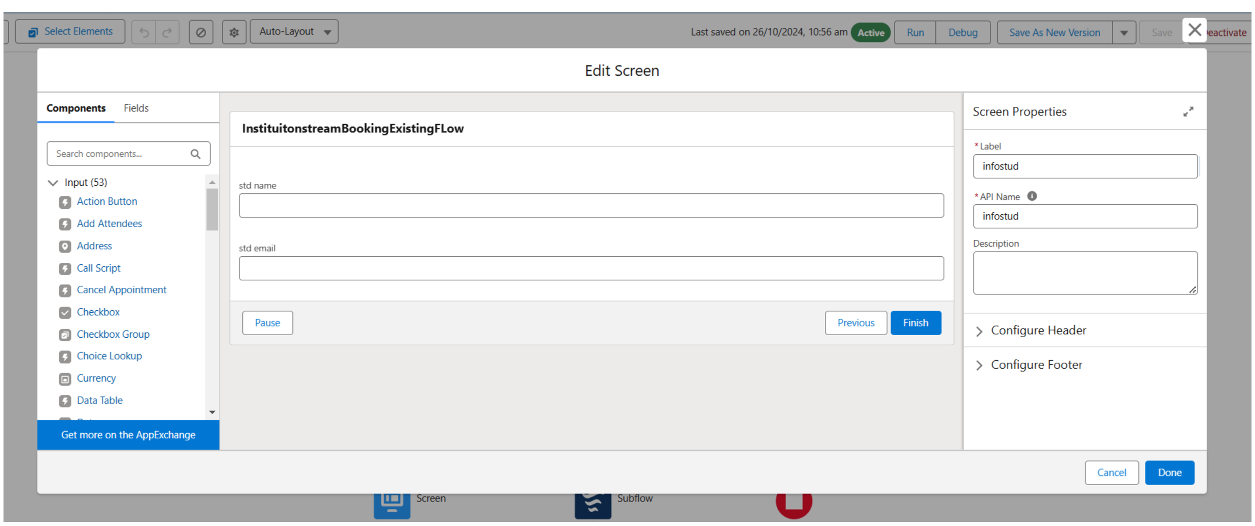

Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Save As New Version
Save
Activate
Start
Record-Triggered Flow
Object: Booking
Edit
Trigger: A record is created
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Booking
End
Configure Start
Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
* Object
Booking
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:



TASK-6 Existing student flow for a Booking

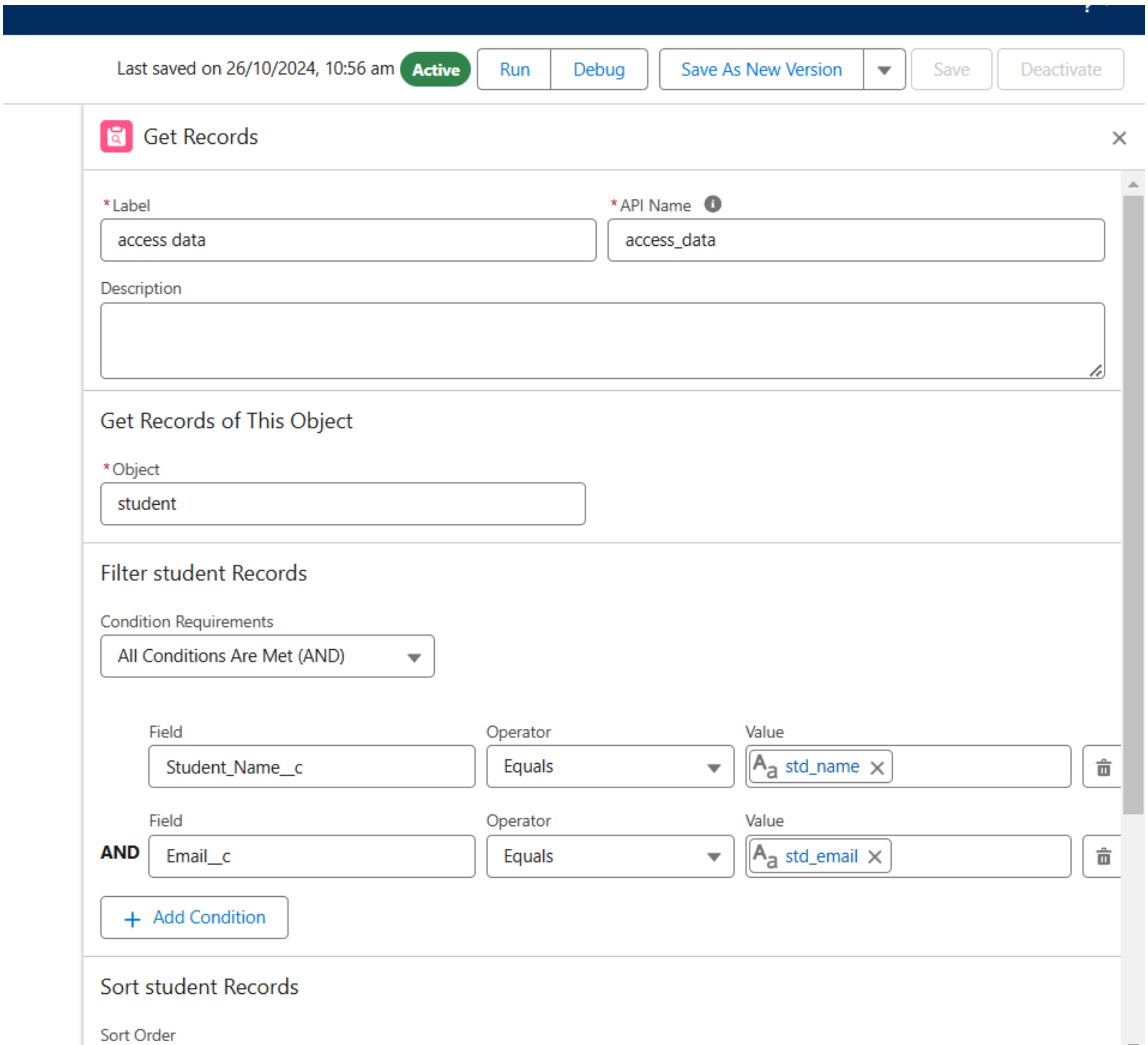
6.1 Add a screen

- Go to the quick find box, search for flows.
- click on flows, click on new flow, click on screen Flow and click on create.
- Click on the + after the start, click on screen,give infostud as the screen name.
- Now in the left side corner, go to components, search for text.
- Add two text components to the screen.
- name the two text components as std name & std email,
- click on Done.



6.2 Add GET Record Element

- After the infostud element, add a GET record element.
- name the element as access data.
- set object name as student.
- place the following fields in the student records:
  field : Student_Name__c ; value : std_name,
  field : Email__c ; value : std_email
- Click on save.

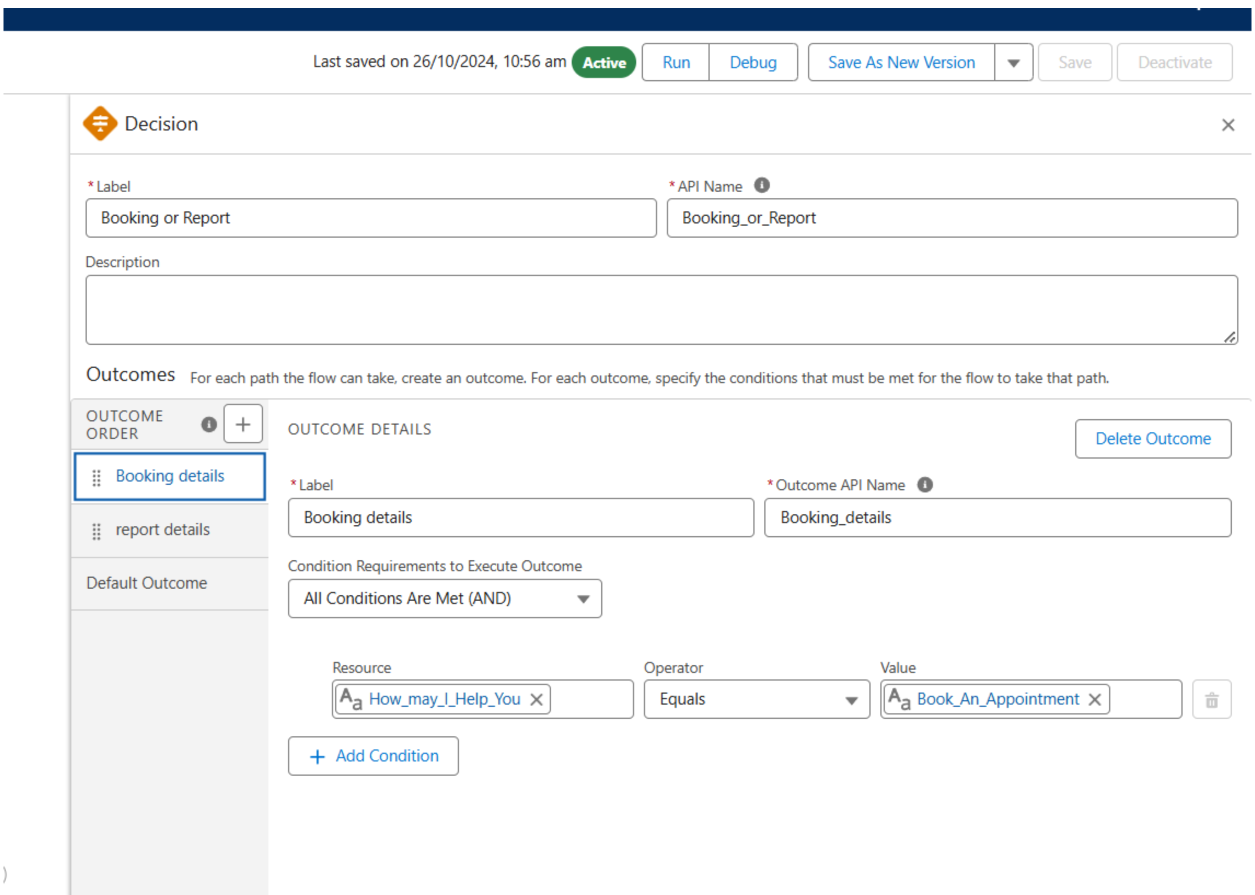


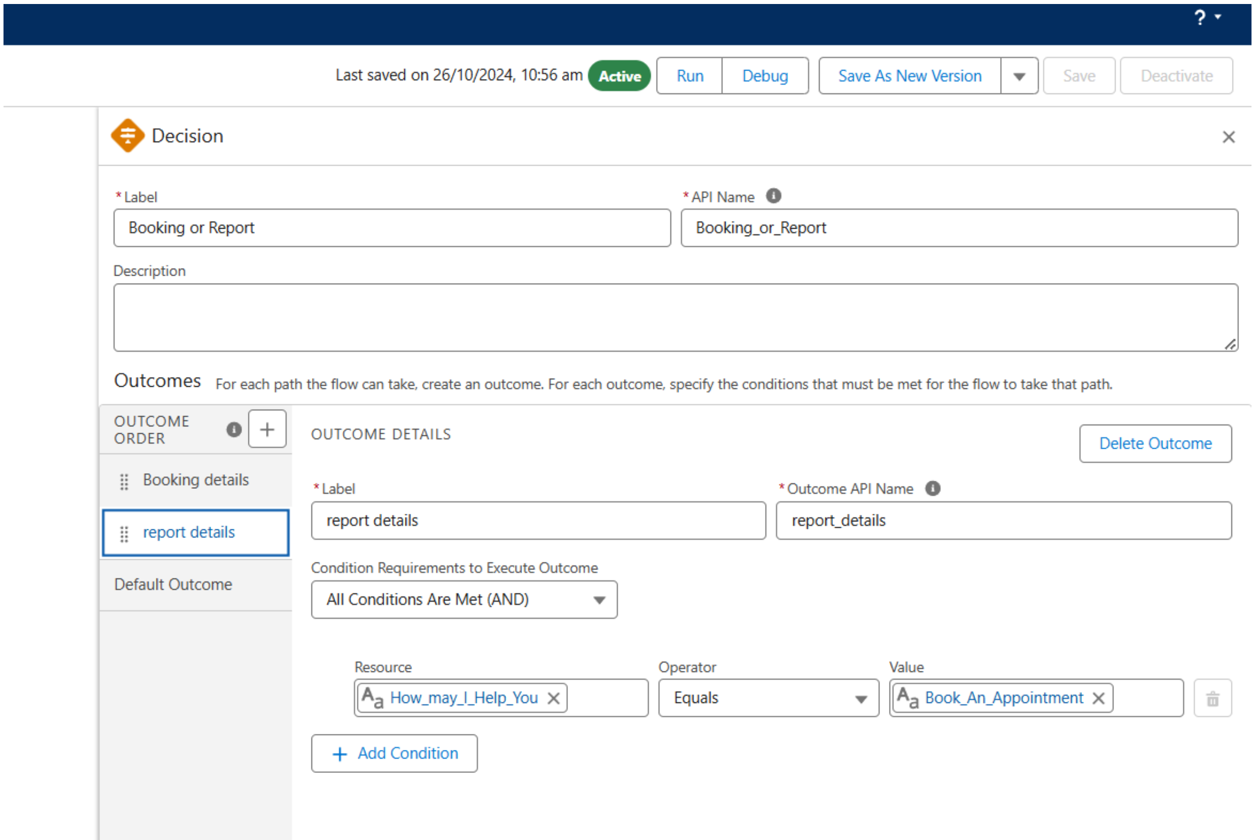
6.3 Add Decision Element

- After the access data element, add a decision element.
- name the decision element as Booking or Report.
- Under the outcome details, give label as Booking details.
- place the following values:

  Resource : How_may_I_help_you ; value : Book_an_Appointment.
- click on + beside the outcome order.
- label as report details.
- place the following values:

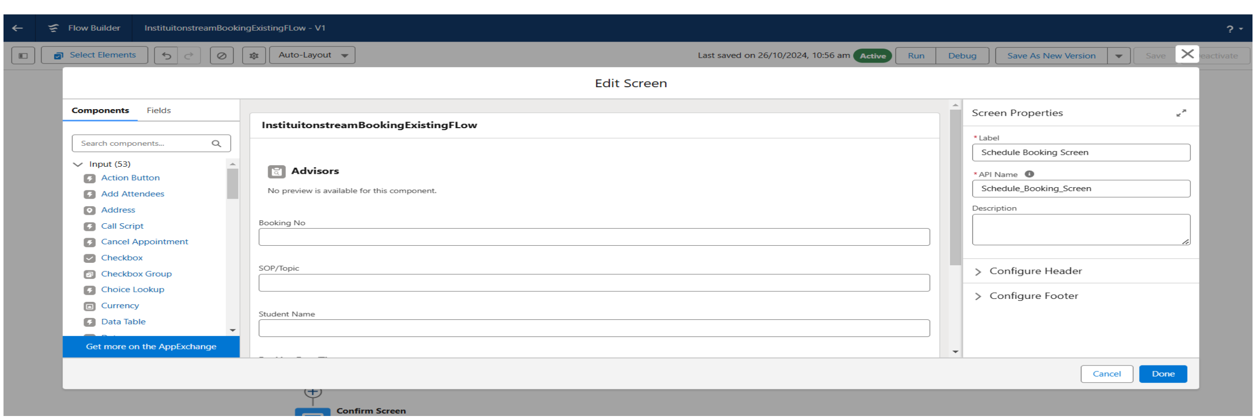
  Resource : How_may_I_help_you ; value : Book_an_Appointment.
- click on save.





6.4 Add screen

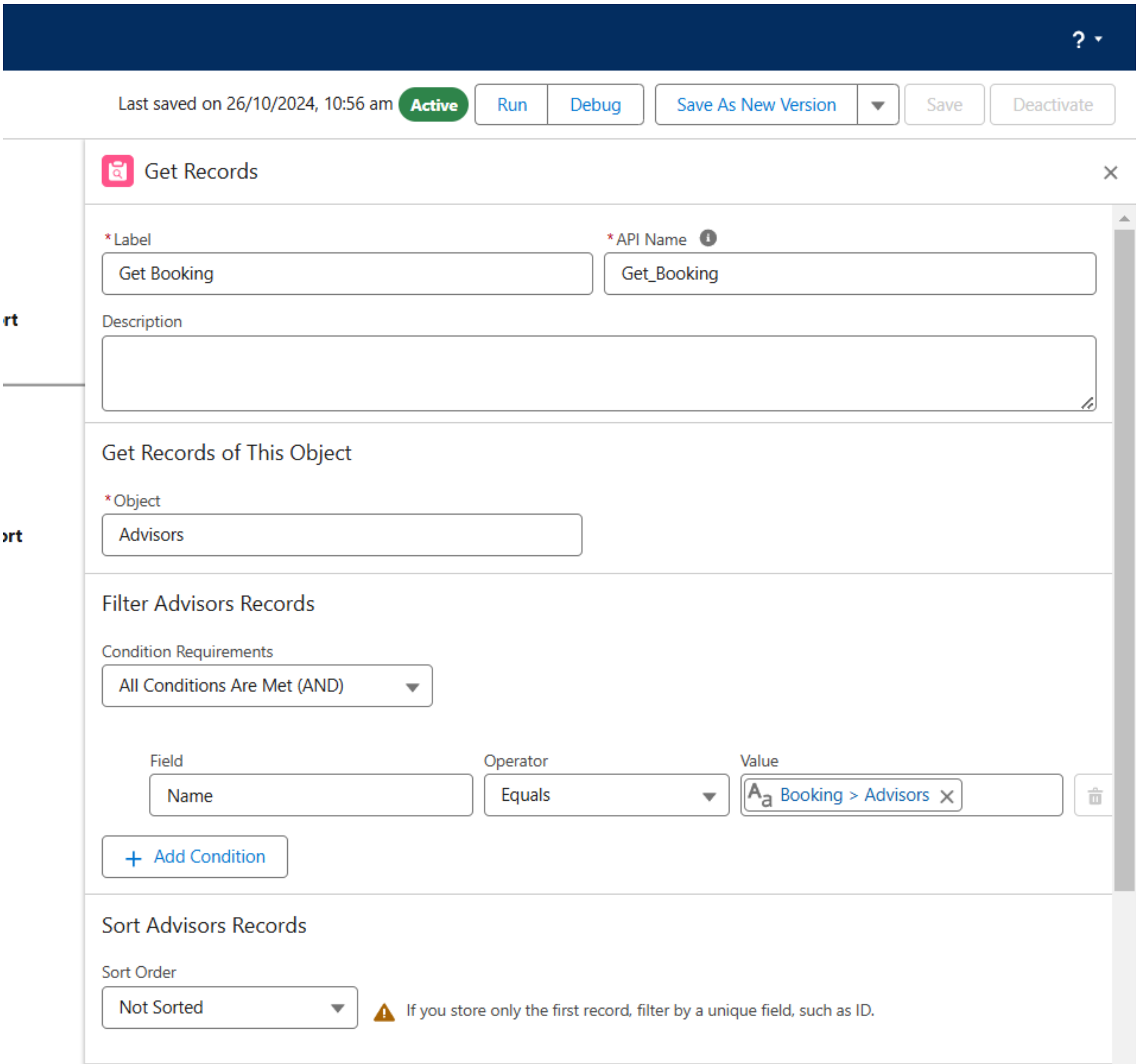
- ➤ Add a screen in the booking details path.
- ➤ give name as schedule Booking screen.
- ➤ Go to the fields in the top left side corner, click on record variable, click on new resource.
- ➤ label it as Booking,give object as Booking,click on done.
- ➤ Drag the necessary Booking object fields into the screen,click on save.



6.5 Add GET Record Element

- After the Schedule Booking Screen element, add a GET record element.
- name the element as Get Booking,set object name as Advisors.
- place the following fields in the student records:

  field : Name ; value : {!Booking.Advisors__c}.
- click on save.

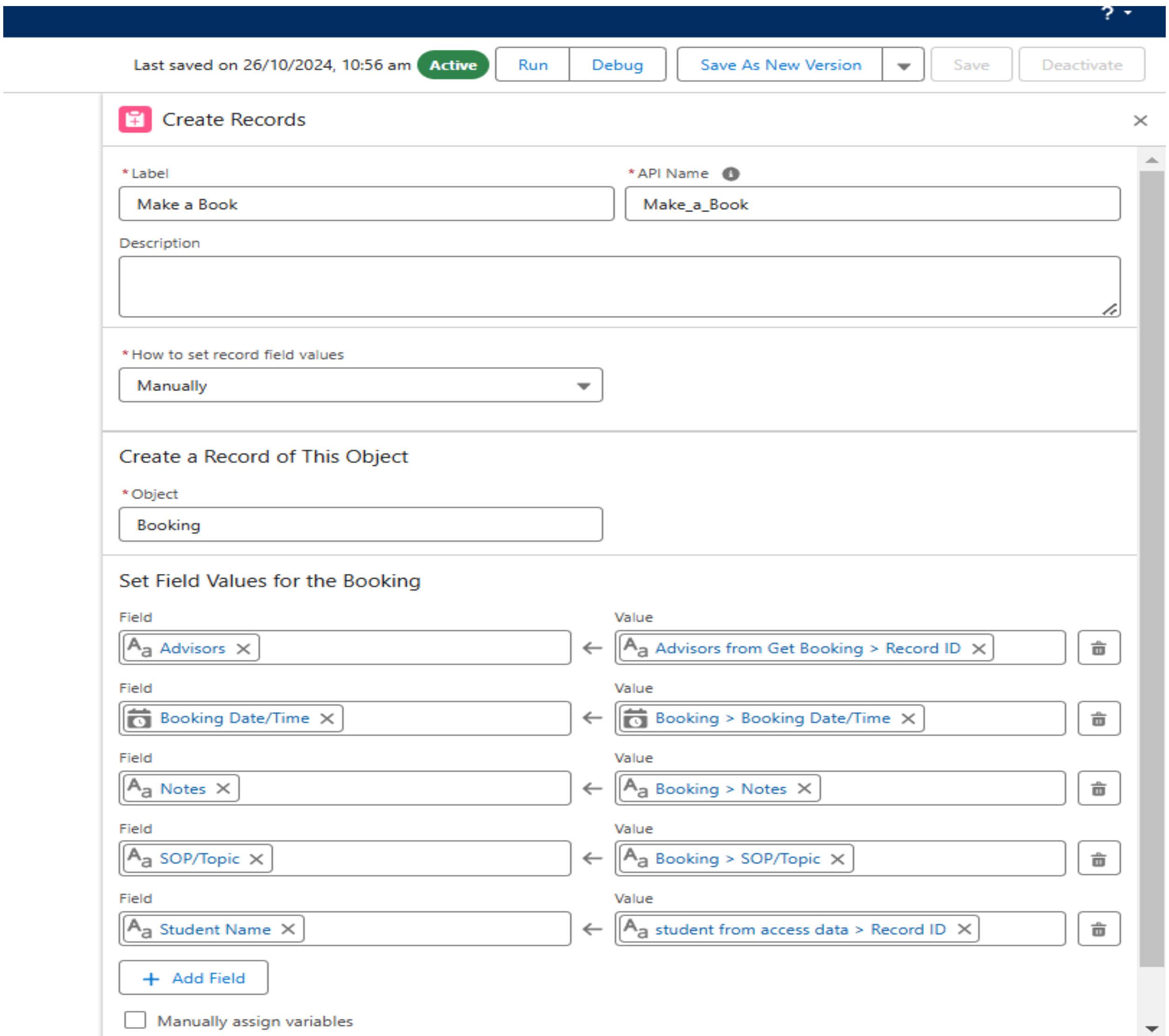


6.6 Add a Create Record Element

- After the Get Booking element, add a create record element.
- label it as Make a Book, set object as Booking.
- set the following field values :

field1 :Advisors__c ; value1 : {!Get_Booking.Id},
field1 : Booking_DateTime__c; value1 : {!Booking.Booking_DateTime__c} ,
field1 : Notes__c; value1 :{!Booking.Notes__c} ,
field1 :SOPTopic__c ; value1 :{!Booking.SOPTopic__c},
field1 :Student_Name__c ; value1 :{!access_data.Id}

- Click on save.

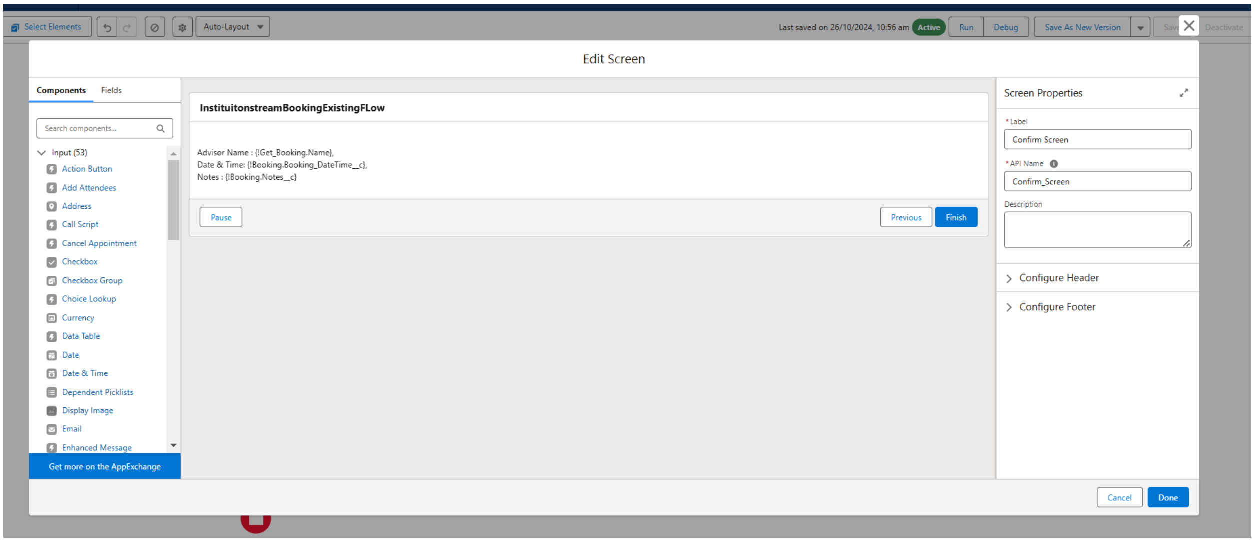


6.7 Add screen

- ➤ Add a screen after the make a book element,give name as confirm screen.
- ➤ Go to the components in the left side corner, search for display text.
- ➤ drag the display text component onto the main screen,give BookingSuccess as the name.
- ➤ place the following text in the display text body:

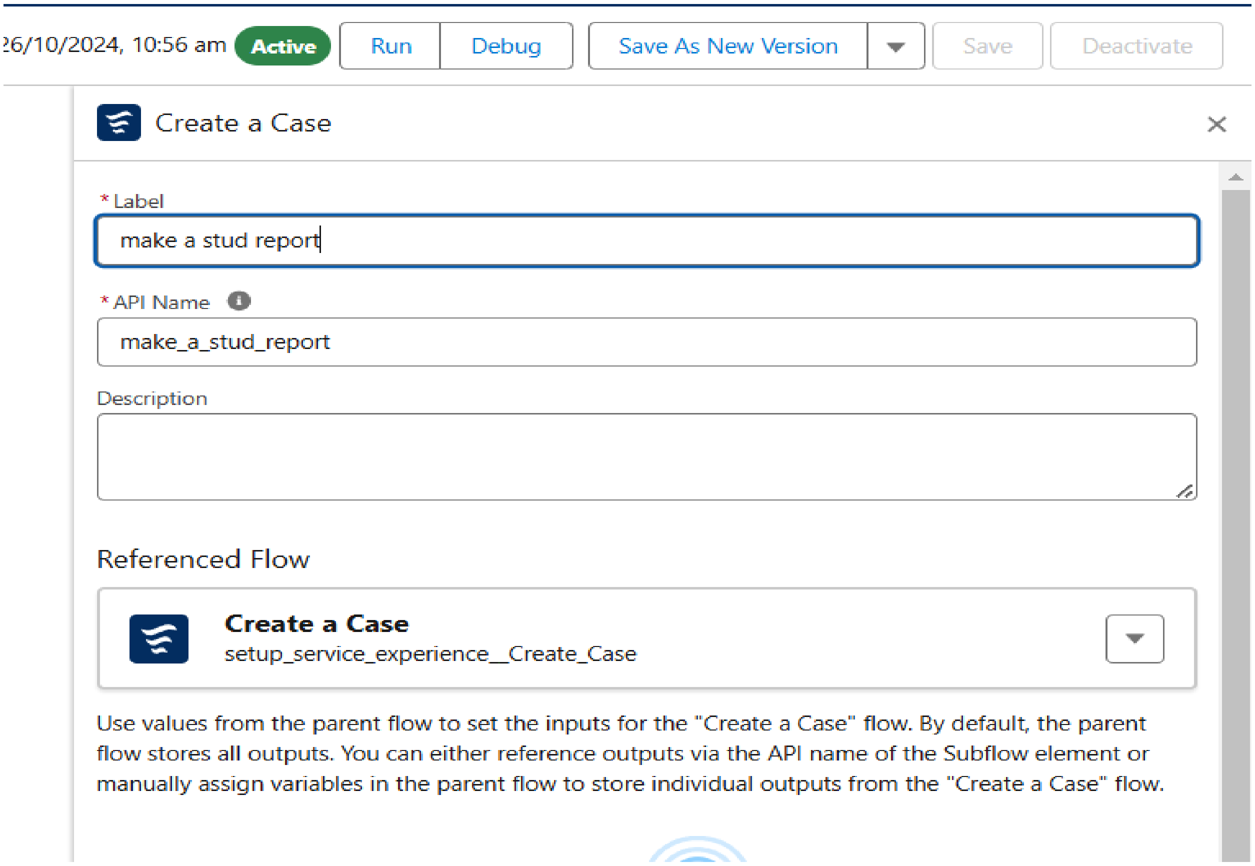
Advisor Name : {!Get.Booking.Name},
Date & Time: {!Booking.Booking_DateTime_c},
Notes : {!Booking.Notes_c}

- ➤ click on done.



6.8 Add screen

- ➤ Add a subflow element in the report details path.
- ➤ select create a case and label teh subflow as make a stud report.
- ➤ save the flow with the name InstitutionstramBookingExistingFlow.



TASK-7 Flow to combine all flows

7.1 Add screen

- ➤ Add a screen after the start element,give name as welcome.
- ➤ Go to the components in the left side , search for display text.
- ➤ drag the display text component onto the main screen,give confirmsms as the name.
- ➤ place the followimng text:

Welcome to InstitutionstreamBooking

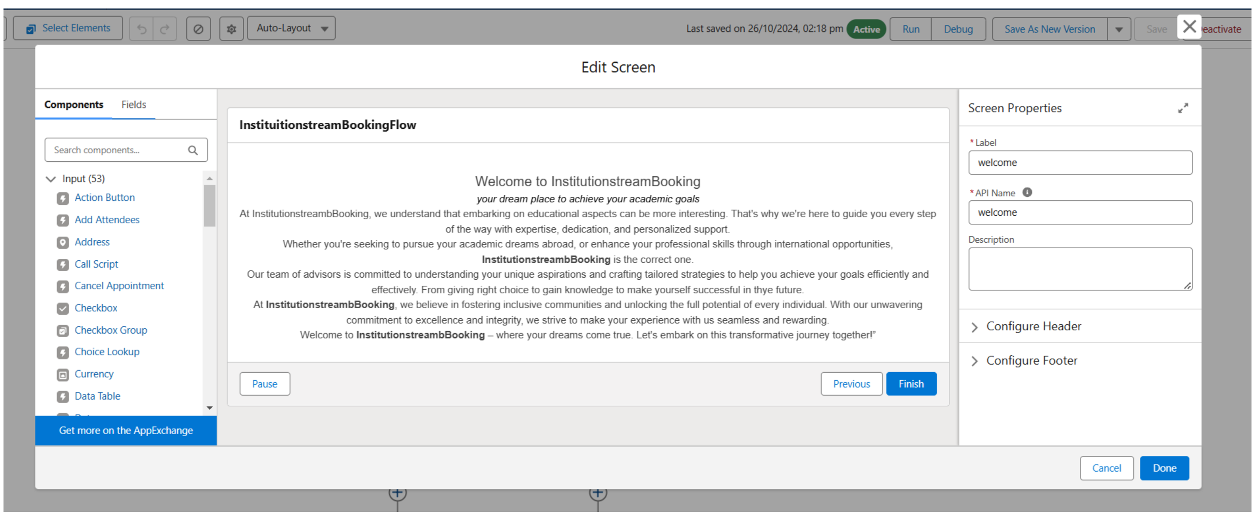
your dream place to achieve your academic goals

At InstitutionstreambBooking, we understand that embarking on educational aspects can be more interesting. 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, or

enhance your professional skills through international opportunities, **InstitutionstreambBooking** is the correct one.
Our team of advisors is committed to understanding your unique aspirations and crafting tailored strategies to help you achieve your goals efficiently and effectively. From giving right choice to gain knowledge to make yourself successful in thye future.
At **InstitutionstreambBooking**, 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 **InstitutionstreambBooking** – where your dreams come true. Let's embark on this transformative journey together!"

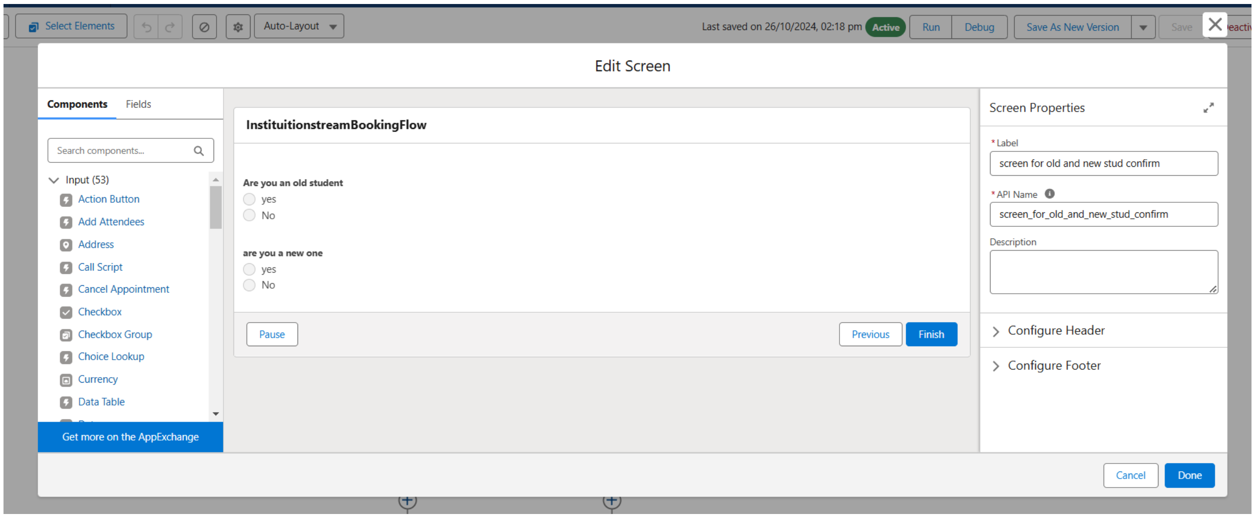
- ➤ click on done.



7.2 Add screen

- ➤ Add a screen after the welcome screen element,give name as screen for old and new stud confirm.
- ➤ Go to the components in the left side , search for radio buttons.
- ➤ drag the radio button component onto the main screen,give are you an old student as the name.
- ➤ create new choices yes and no.

- ➤ drag the radio button component onto the main screen,give are you an new one as the name.
- ➤ create new choices yes and no.
- ➤ click on done.



7.3 Add Decision Element

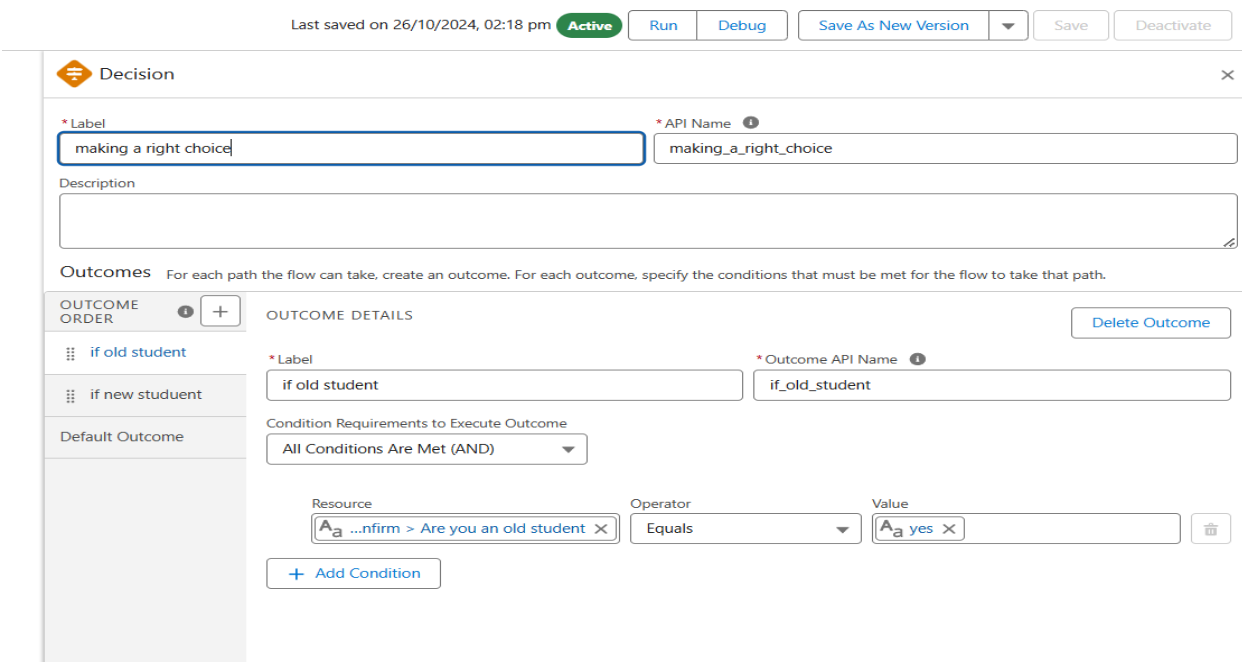
- ➤ After the screen for old and new stud confirm element, add a decision element,name the decision element as making a right choice.
- ➤ Under the outcome details, give label as if old student.
- ➤ place the following values:

Resource :{!Are_you_an_old_student} ; value :{!yes}.

- ➤ click on + beside the outcome order,label as if new studuent.
- ➤ place the following values:

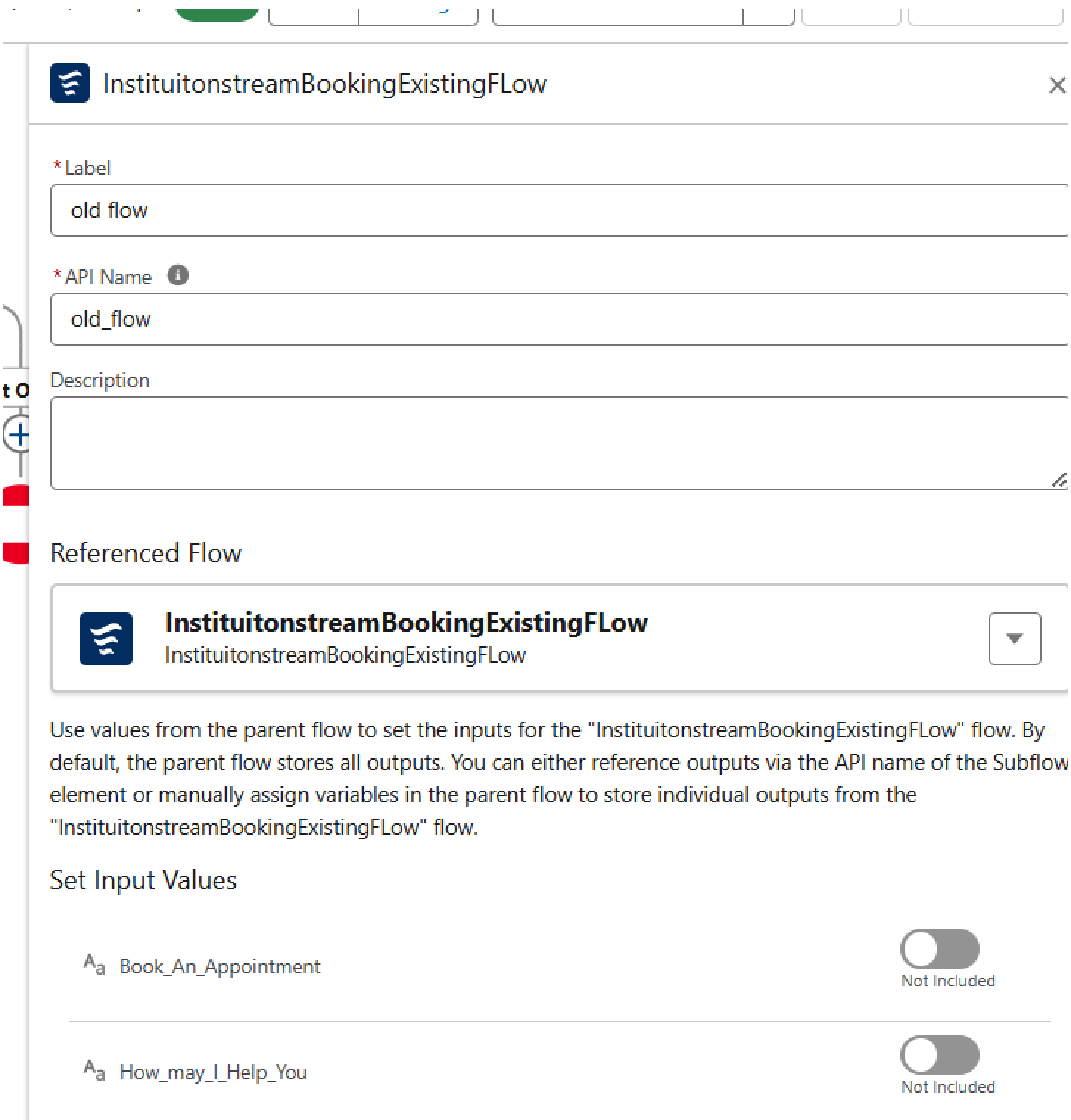
Resource :{!are_you_a_new_one} ; value :{!No}.

- ➤ click on save.



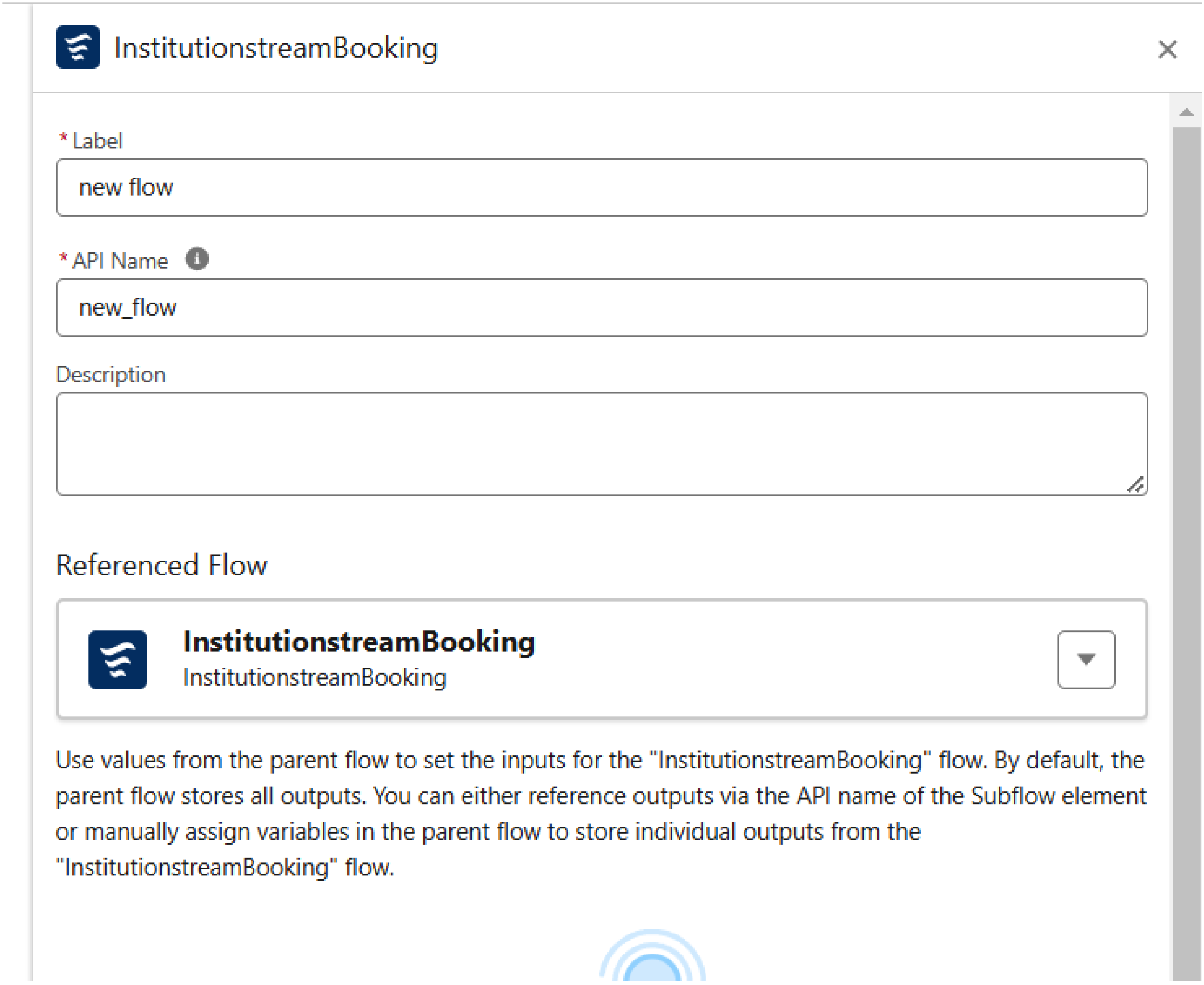
7.4 Add Subflow

- In the if old student path, add a sub flow, select InstituitonstreamBookingExistingFLow and label the subflow as old flow.
- click on save.



7.5 Add Subflow

- ➤ In the if new student path, add a sub flow, select InstituitonstreamBooking and label the subflow as the new flow.
- ➤ click on save.



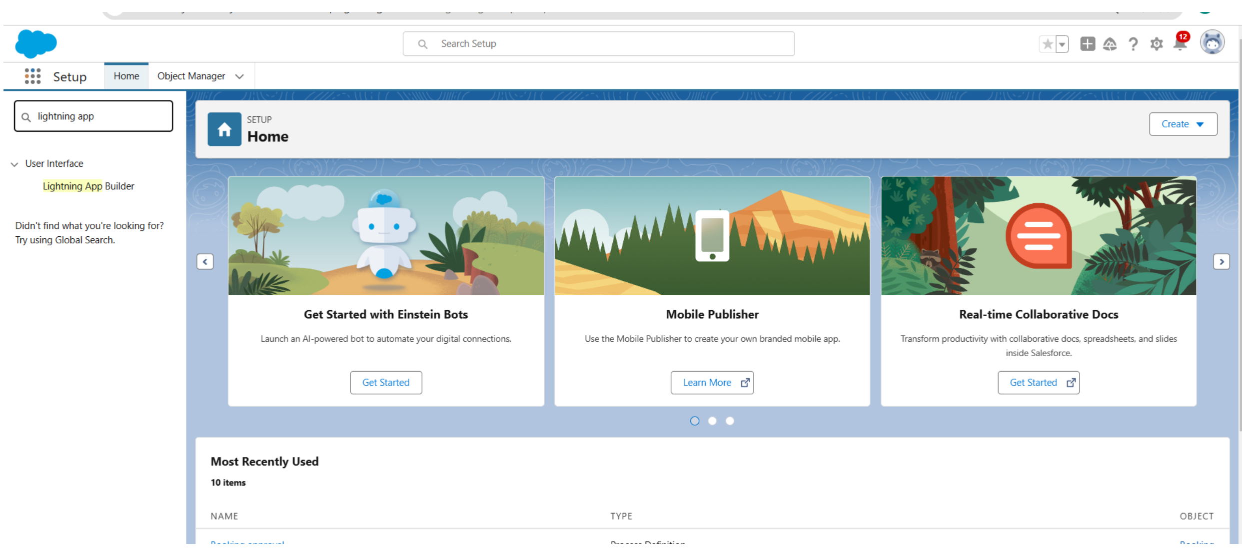
- save the flow with the name InstitutionstreamBookingFlow.

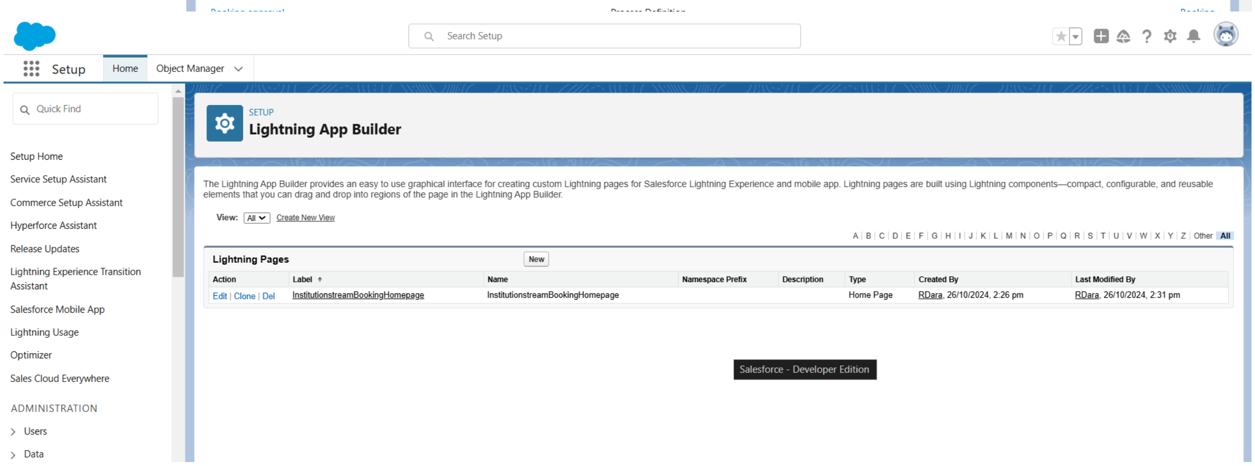
TASK-8 Lightning app page creation

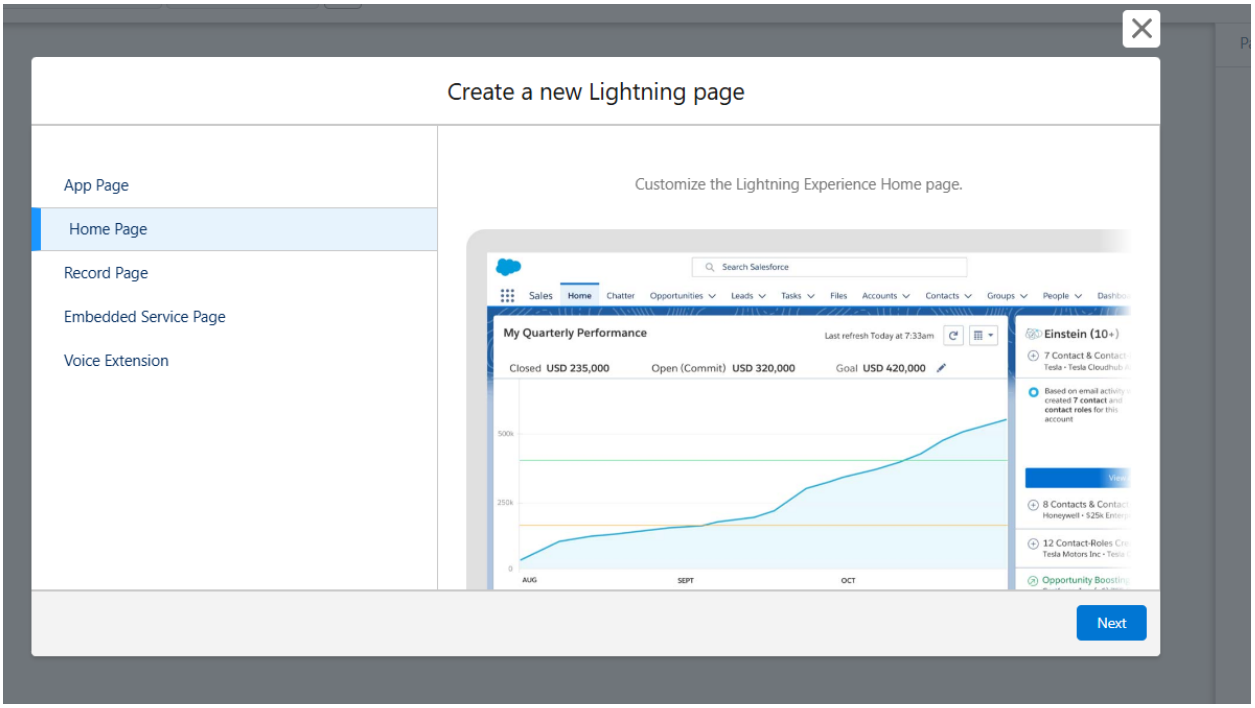
8.1 creating a lightning app page

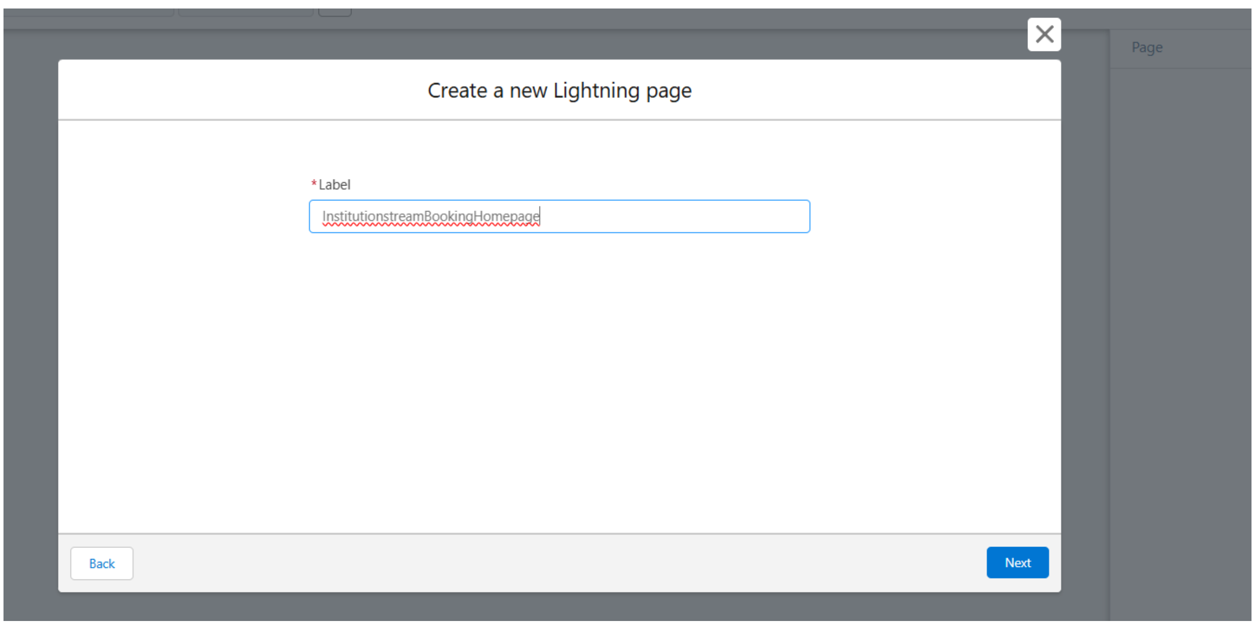
- Go to setup, in the quick find box, search for lightning app builder.
- click on new, click on home page , click next.
- give the label as InstitutionstreamBookingHomepage for the lightning app page.
- select the standard home page,then click done.
- Drag the Flow component to the top-right region.
- Search for the InstituitionstreamBookingFlow and click Save.

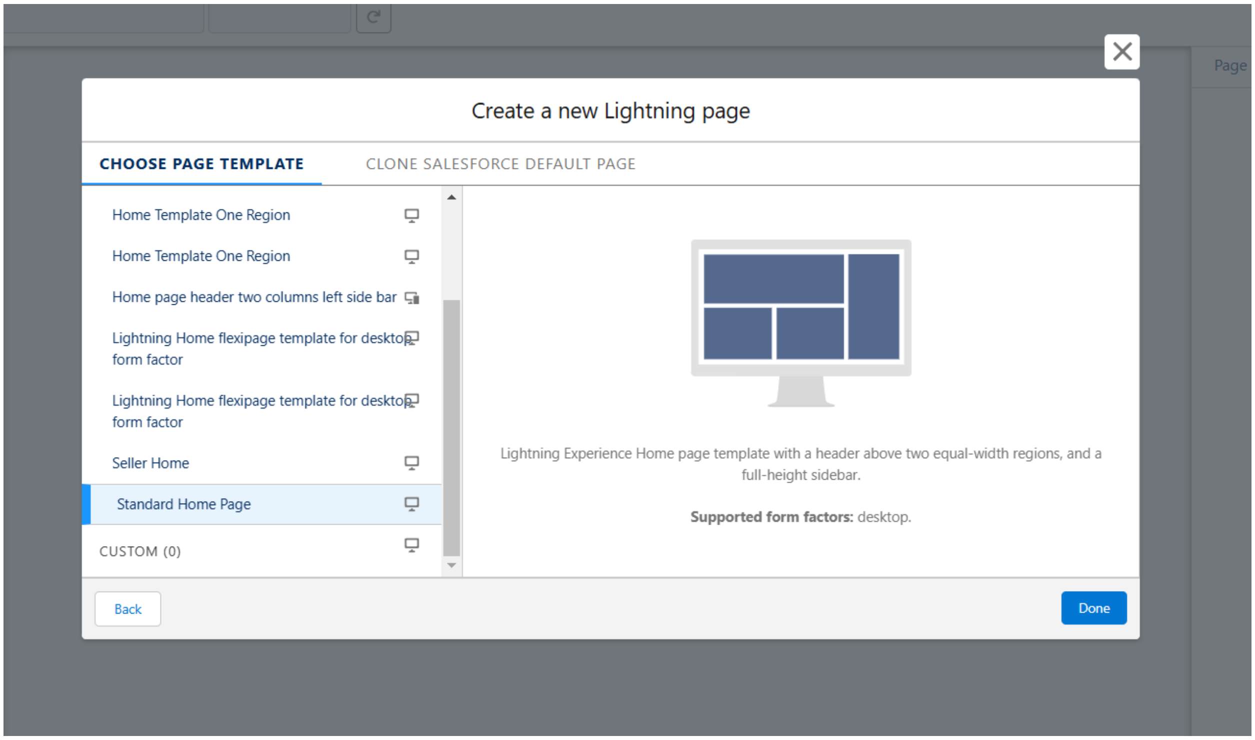
➤ Click Activate, Click App and Profile, then click Assign to Apps and Profiles.
➤ Select the Sales app, then click Next.
➤ Scroll down the list of profiles and select System Administrator, then click Next.
➤ Review the assignment, and then click Save.

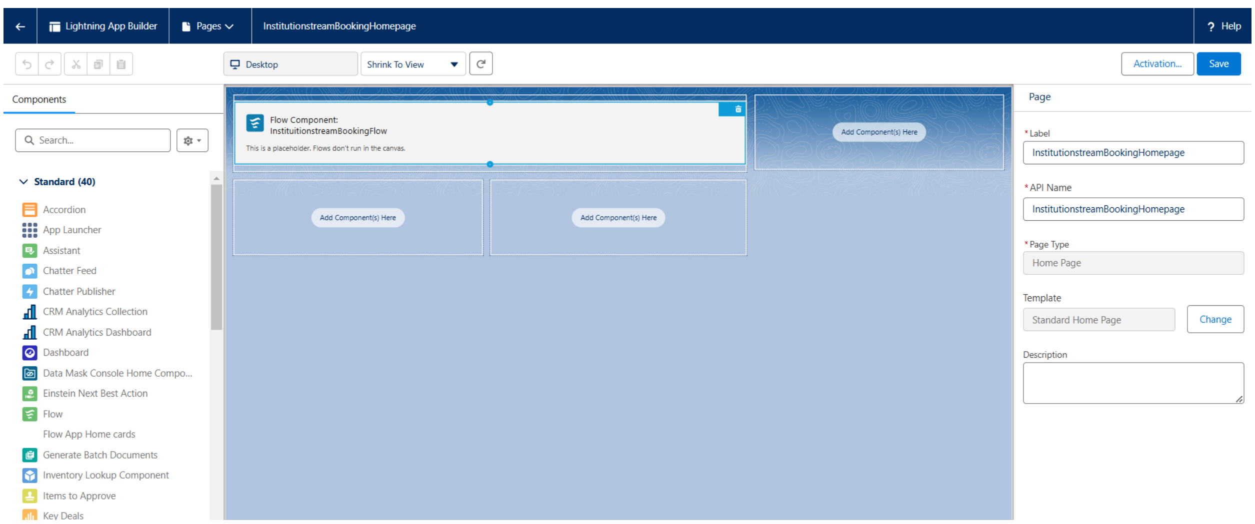





Create a new Lightning page
App Page
Home Page
Record Page
Embedded Service Page
Voice Extension
Customize the Lightning Experience Home page.
Next


Create a new Lightning page
*Label
InstitutionstreamBookingHomepage
Back
Next


Create a new Lightning page
CHOOSE PAGE TEMPLATE
CLONE SALESFORCE DEFAULT PAGE
Home Template One Region
Home Template One Region
Home page header two columns left side bar
Lightning Home flexipage template for desktop form factor
Lightning Home flexipage template for desktop form factor
Seller Home
Standard Home Page
CUSTOM (0)
Lightning Experience Home page template with a header above two equal-width regions, and a full-height sidebar.
Supported form factors: desktop.
Back
Done


Lightning App Builder
Pages
InstitutionstreamBookingHomepage
Help
Desktop
Shrink To View
Activation...
Save
Components
Standard (40)
Accordion
App Launcher
Assistant
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
Flow Component: InstitutionstreamBookingFlow
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
InstitutionstreamBookingHomepage
API Name
InstitutionstreamBookingHomepage
Page Type
Home Page
Template
Standard Home Page
Change
Description