A CRM Application to Manage the Services offered by an Institution

By
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PROJECT ABSTRACT

EduConsultPro Institute, a leading educational institution offering a wide range of courses and programs, is experiencing challenges managing its growing volume of student applications, inquiries, and consulting services. To address these challenges and enhance both student and staff experiences, EduConsultPro has chosen to implement Salesforce CRM to streamline the admissions process. The goal is to create a seamless, transparent, and efficient journey for prospective students, while enabling the admissions team to manage applications, inquiries, and cases with ease.

With Salesforce, EduConsultPro aims to optimize every step of the admissions workflow, from application submission to enrollment, ensuring efficiency and consistency for applicants. This CRM solution will also improve student engagement through personalized communication, providing real-time updates on application status and prompt responses to inquiries. By centralizing student information, the CRM allows admissions staff and consulting experts to access comprehensive applicant profiles, reducing redundancies and enhancing case management. Additionally, Salesforce's reporting and analytics will provide valuable insights into applicant trends and conversion rates, enabling data-driven decisions to further refine the admissions process.

Through these improvements, EduConsultPro Institute intends to set a new standard in student services, ensuring an intuitive and satisfying admissions experience that strengthens its reputation as a leading institution dedicated to student success.

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1.INTRODUCTION

EduConsultPro Institute, a leading provider of diverse educational programs, is dedicated to delivering an exceptional experience for prospective students. However, with increasing interest each year, the institute faces challenges in effectively managing student admissions, handling inquiries, and providing expert consulting. To address these demands and elevate service quality, EduConsultPro has chosen to integrate Salesforce CRM into its admissions process.

The goal of this project is to streamline the admissions journey, creating a centralized platform that automates key steps and enhances transparency. By leveraging Salesforce, EduConsultPro aims to improve response times, manage inquiries efficiently, and personalize communication with prospective students. This solution will empower the admissions team to handle applications and cases more effectively, while enabling prospective students to stay informed and feel supported throughout the application process.

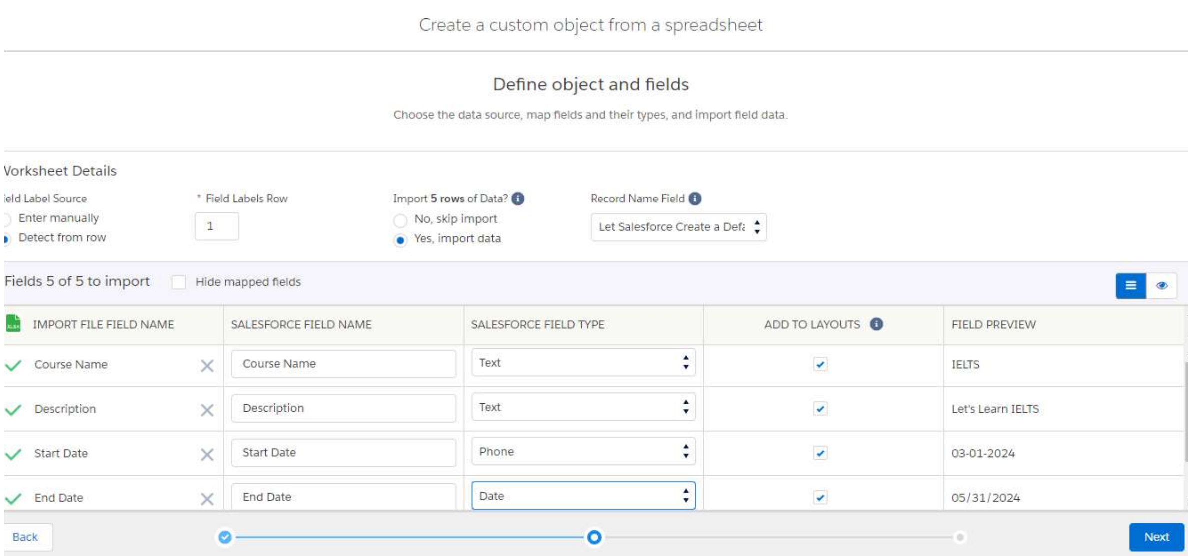
Through this Salesforce integration, EduConsultPro is reinforcing its commitment to operational excellence and student success, laying the groundwork for a more dynamic, responsive, and student-focused admissions experience.

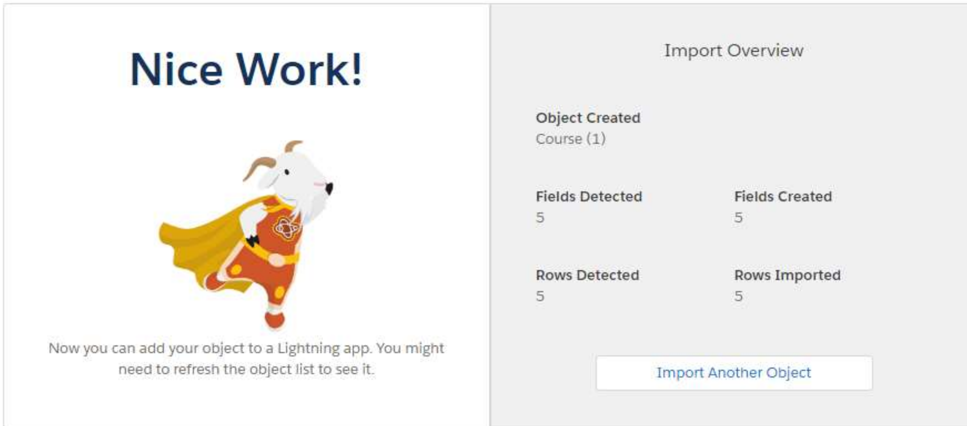
2.**Create Objects from Spreadsheet**

Steps to Create a Course Object in Salesforce using a Spreadsheet

1. **Access Object Manager**: In Salesforce, navigate to **Setup** and select **Object Manager** from the menu.
2. **Create Object from Spreadsheet**: In Object Manager, click on **Create Object from Spreadsheet**.
3. **Download the Course Spreadsheet**: Use the provided link to download the "Course" spreadsheet file to your computer.
4. **Upload the Spreadsheet**: In Salesforce, select the downloaded "Course" file and upload it.
5. **Map Fields**: Map each column in the spreadsheet to the corresponding Salesforce field for the new Course object.
6. **Finalize and Create Object**: Review the mappings, make any necessary adjustments, and complete the upload to create the new Course object with the imported data.

These steps will enable you to upload course information into Salesforce, establishing a Course object with structured data from the spreadsheet.



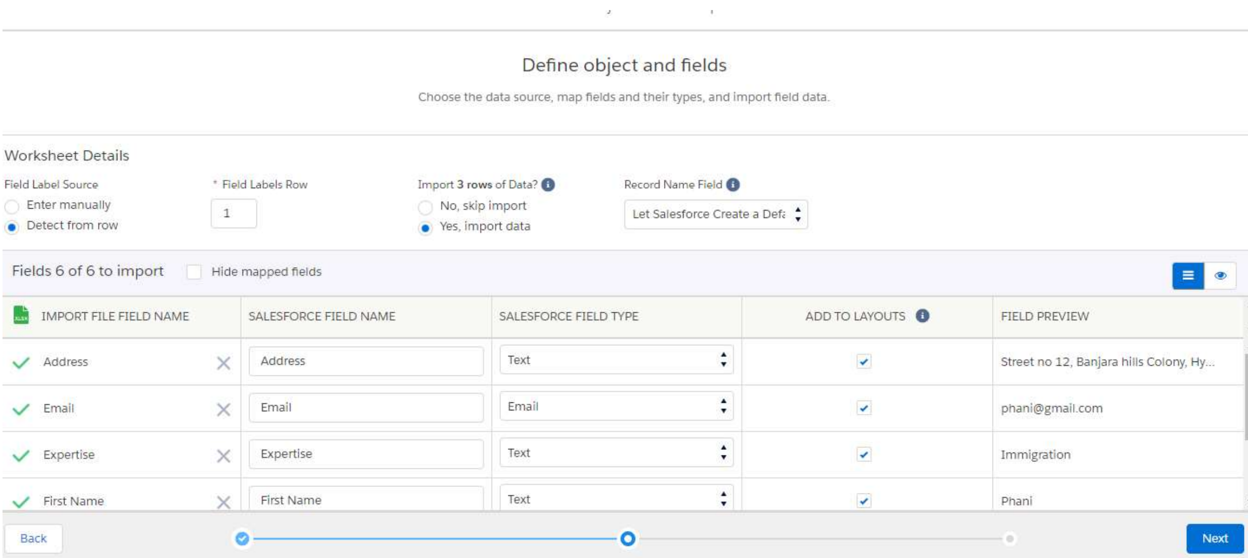


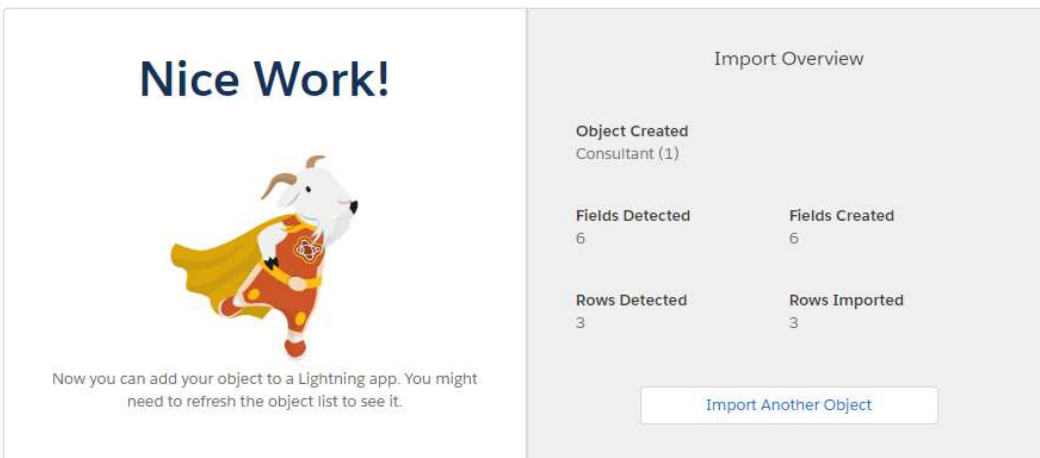
Create Remaining objects

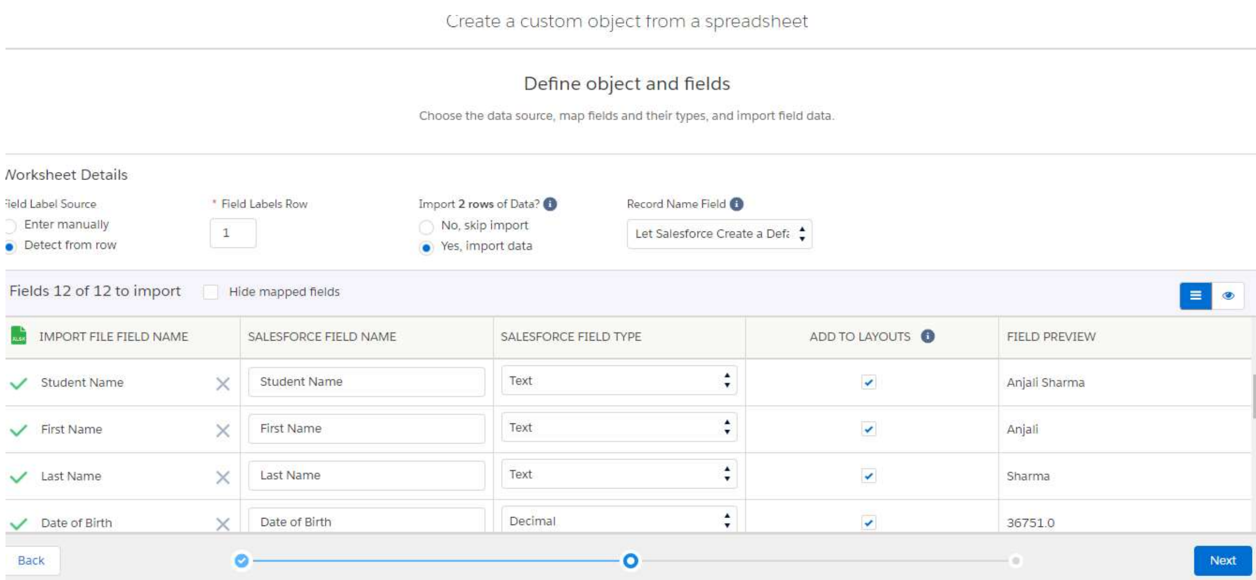
To create the remaining objects (Consultant, Student, and Appointment) in Salesforce, follow the same process used for the Course object. Here's how:

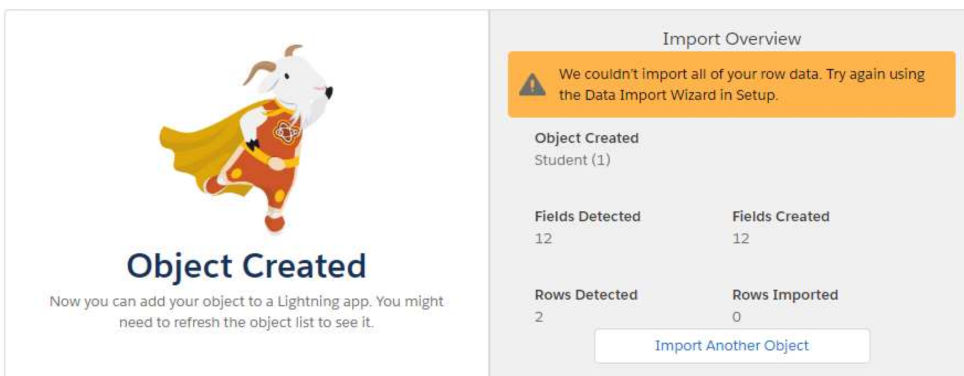
1. **Open Object Manager**: Go to **Setup** in Salesforce and select **Object Manager**.
2. **Select "Create Object from Spreadsheet"**: In Object Manager, click on **Create Object from Spreadsheet**.
3. **Download and Upload Each Spreadsheet**:
   - For each new object (Consultant, Student, and Appointment), download the corresponding spreadsheet file.
   - Upload the downloaded file (e.g., Consultant, Student, or Appointment) by selecting it in the Salesforce interface.
4. **Map Fields**: Map the fields in each spreadsheet to the respective Salesforce fields for the Consultant, Student, and Appointment objects.
5. **Review and Complete**: Confirm the field mappings, adjust if needed, and proceed with the upload to create each object.

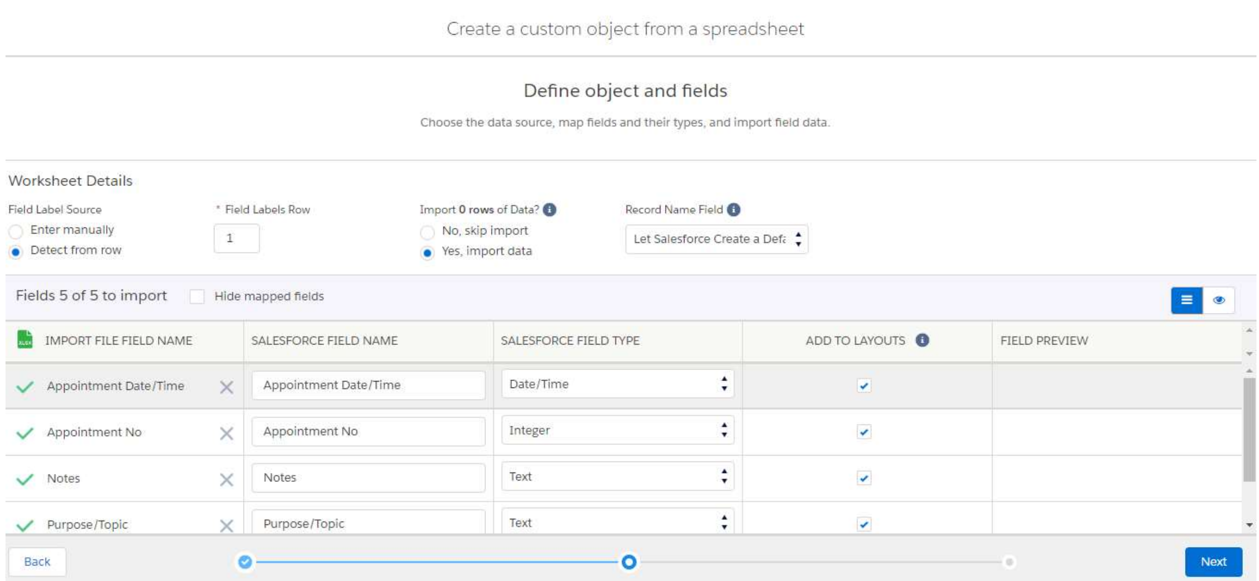
Repeat these steps individually for **Consultant**, **Student**, and **Appointment** objects. This will complete the setup of all required objects in Salesforce using the uploaded spreadsheet data.

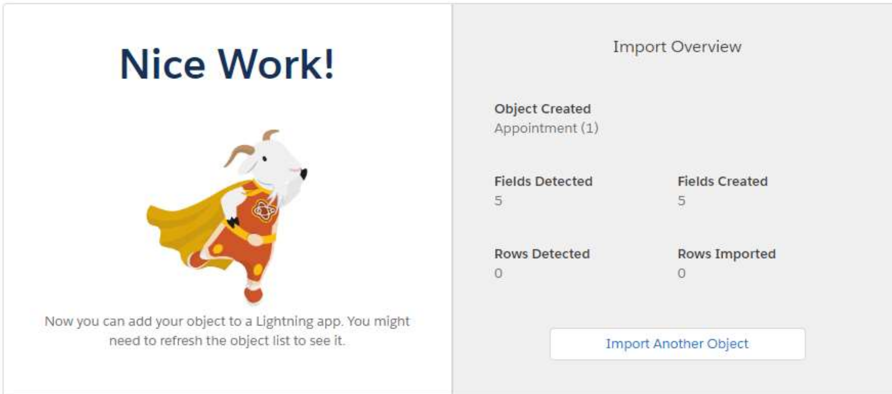

Define object and fields
Choose the data source, map fields and their types, and import field data.
Worksheet Details
Field Label Source
Enter manually
Detect from row
* Field Labels Row
1
Import 3 rows of Data?
No, skip import
Yes, import data
Record Name Field
Let Salesforce Create a Defa
Fields 6 of 6 to import
Hide mapped fields
IMPORT FILE FIELD NAME
SALESFORCE FIELD NAME
SALESFORCE FIELD TYPE
ADD TO LAYOUTS
FIELD PREVIEW
Address
Address
Text
Street no 12, Banjara hills Colony, Hy...
Email
Email
Email
phani@gmail.com
Expertise
Expertise
Text
Immigration
First Name
First Name
Text
Phani
Back
Next


Nice Work!
Now you can add your object to a Lightning app. You might need to refresh the object list to see it.
Import Overview
Object Created
Consultant (1)
Fields Detected
6
Fields Created
6
Rows Detected
3
Rows Imported
3
Import Another Object


Create a custom object from a spreadsheet
Define object and fields
Choose the data source, map fields and their types, and import field data.
Worksheet Details
Field Label Source
Enter manually
Detect from row
* Field Labels Row
1
Import 2 rows of Data?
No, skip import
Yes, import data
Record Name Field
Let Salesforce Create a Defa
Fields 12 of 12 to import
Hide mapped fields
IMPORT FILE FIELD NAME
SALESFORCE FIELD NAME
SALESFORCE FIELD TYPE
ADD TO LAYOUTS
FIELD PREVIEW
Student Name
Student Name
Text
Anjali Sharma
First Name
First Name
Text
Anjali
Last Name
Last Name
Text
Sharma
Date of Birth
Date of Birth
Decimal
36751.0
Back
Next


Object Created
Now you can add your object to a Lightning app. You might need to refresh the object list to see it.
Import Overview
We couldn't import all of your row data. Try again using the Data Import Wizard in Setup.
Object Created
Student (1)
Fields Detected
12
Fields Created
12
Rows Detected
2
Rows Imported
0
Import Another Object


Create a custom object from a spreadsheet
Define object and fields
Choose the data source, map fields and their types, and import field data.
Worksheet Details
Field Label Source
Enter manually
Detect from row
* Field Labels Row
1
Import 0 rows of Data?
No, skip import
Yes, import data
Record Name Field
Let Salesforce Create a Defa
Fields 5 of 5 to import
Hide mapped fields
IMPORT FILE FIELD NAME
SALESFORCE FIELD NAME
SALESFORCE FIELD TYPE
ADD TO LAYOUTS
FIELD PREVIEW
Appointment Date/Time
Appointment Date/Time
Date/Time
Appointment No
Appointment No
Integer
Notes
Notes
Text
Purpose/Topic
Purpose/Topic
Text
Back
Next



Create Relationship among the objects

1. Create Lookup Relationships for Appointment

- **Appointment and Student**:
  - Open the **Appointment** object in Object Manager.
  - Under **Fields & Relationships**, click on **New**.
  - Select **Lookup Relationship** and choose **Student** as the related object.
  - Complete the setup by defining the field label (e.g., "Student").
- **Appointment and Consultant**:
  - In the **Appointment** object, go to **Fields & Relationships** and click **New**.
  - Select **Lookup Relationship** again, this time choosing **Consultant** as the related object.
  - Label the field appropriately, such as "Consultant," and save the changes.

2. Create Registration Object

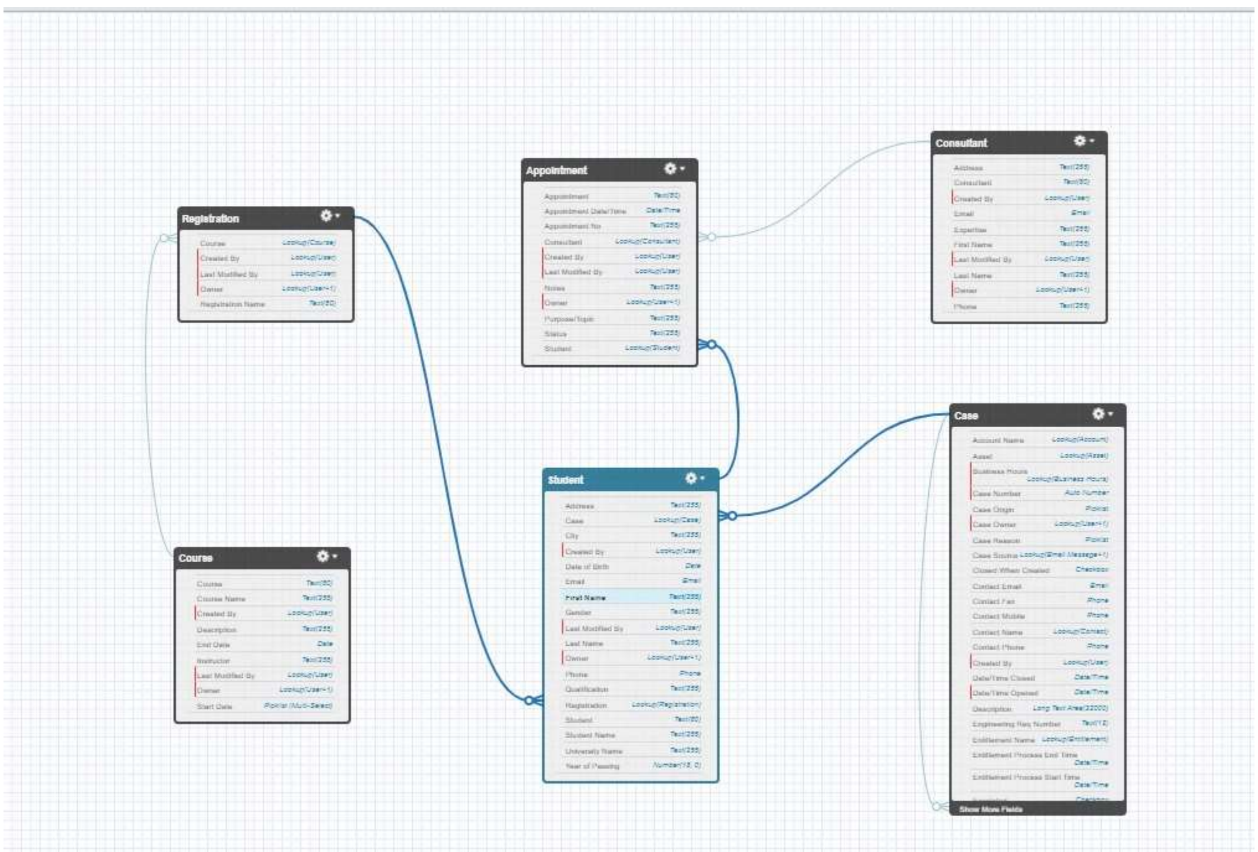
- In **Object Manager**, select **Create Custom Object** and name the new object **Registration**.
- This object will store details about students and the courses they are enrolled in.
- After creating the object, go to **Fields & Relationships** within Registration and add the necessary fields (e.g., Course ID, Enrollment Date, etc.).
- Create lookup relationships to link **Registration** with the **Student** and **Course** objects.

3. Create Lookup Relationship for Student Queries

- **Student and Case**:
  - Open the **Student** object in Object Manager.

- In **Fields & Relationships**, click on **New** and choose **Lookup Relationship**.
- Select **Case** as the related object, enabling the storage of immigration or visa-related queries for each student.
- Label the field (e.g., "Student Queries") and save the relationship.

Following these steps will configure the relationships between Appointment and Student, Appointment and Consultant, Student and Registration, and Student and Case, mirroring the provided data model setup.



Configure the Case Object

To configure the Case object in Salesforce, follow these steps:

1. Access the Case Object

- In **Object Manager**, search for and select **Case** to open the object.

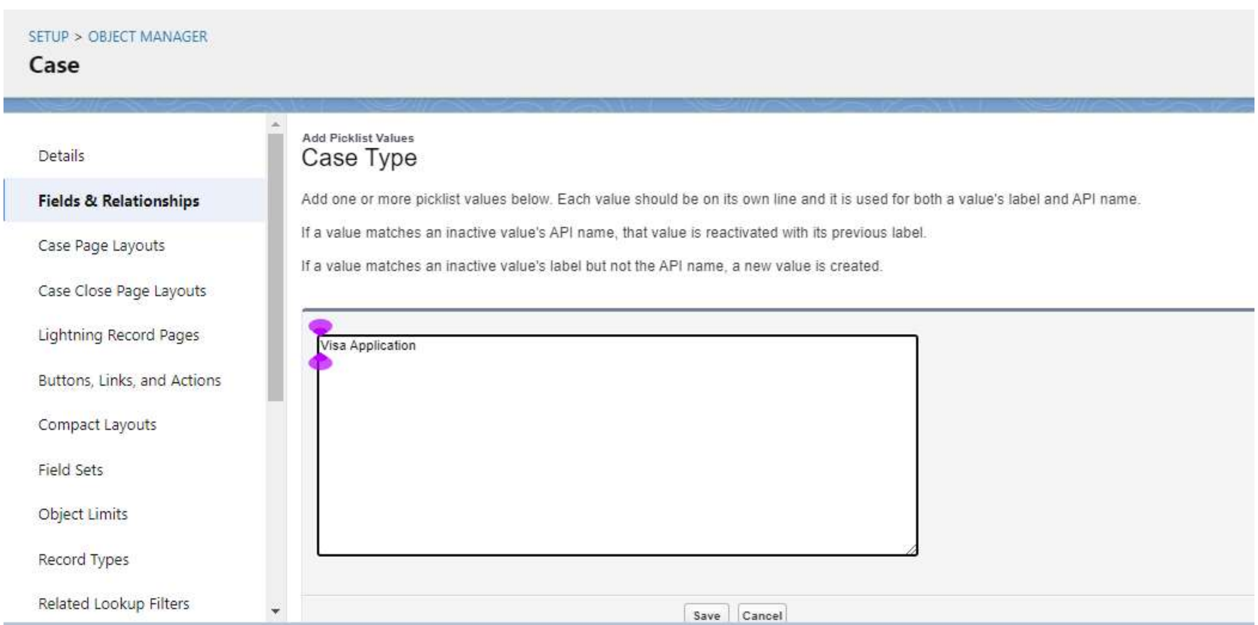
2. Add Values to the “Type” Field

- Go to **Fields & Relationships** within the Case object, then find and select the **Type** field.
- Click **Edit** and add the following values:
  - **Immigration**
  - **Visa Application**
- Save your changes.

3. Add Values to the “Status” Field

- Back in **Fields & Relationships**, locate the **Status** field.
- Edit the field and add the following status values:
  - **Open**
  - **In-progress**
- Save the updates.

These changes will add the specified options to the "Type" and "Status" fields, allowing for more precise case tracking related to student immigration and visa applications.



Create a Lightning App

To create the **EduConsultPro** Lightning App in Salesforce, follow these steps:

1. Open the App Manager

- In **Setup**, type **App Manager** in the Quick Find box and select it.

2. Create a New Lightning App

- Click on **New Lightning App** to begin setting up a new app.
- Enter **EduConsultPro** as the app name, then proceed by clicking **Next** through each setup screen.

3. Add Key Items to the App

- In the **Available Items** list, find and select the following items, then add them to **Selected Items**:
    - **Home**
    - **Students**
    - **Courses**
    - **Consultants**
    - **Appointments**
    - **Registrations**
    - **Cases**

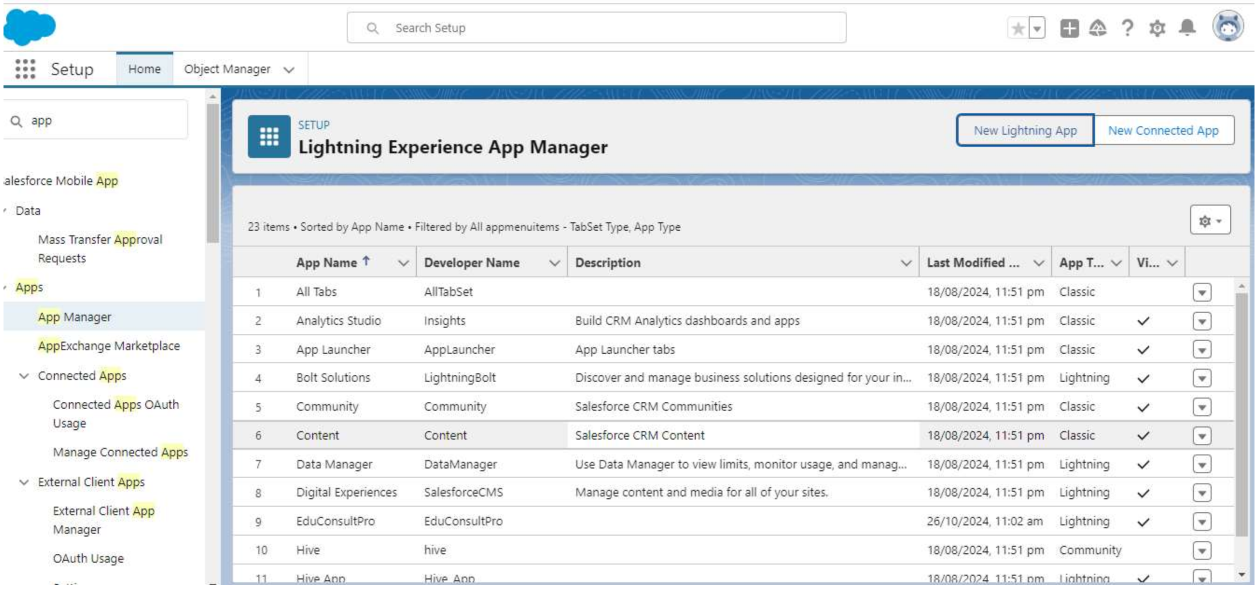
4. Assign Profiles

- Move to the **Available Profiles** section and locate **System Administrator**.
- Add **System Administrator** to the **Selected Profiles** list.

5. Finalize the App Setup

- Click **Save & Finish** to complete the app setup.

This will create the **EduConsultPro** app with all necessary tabs and profiles assigned, making it accessible to the System Administrator.


Search Setup
Setup
Home
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app
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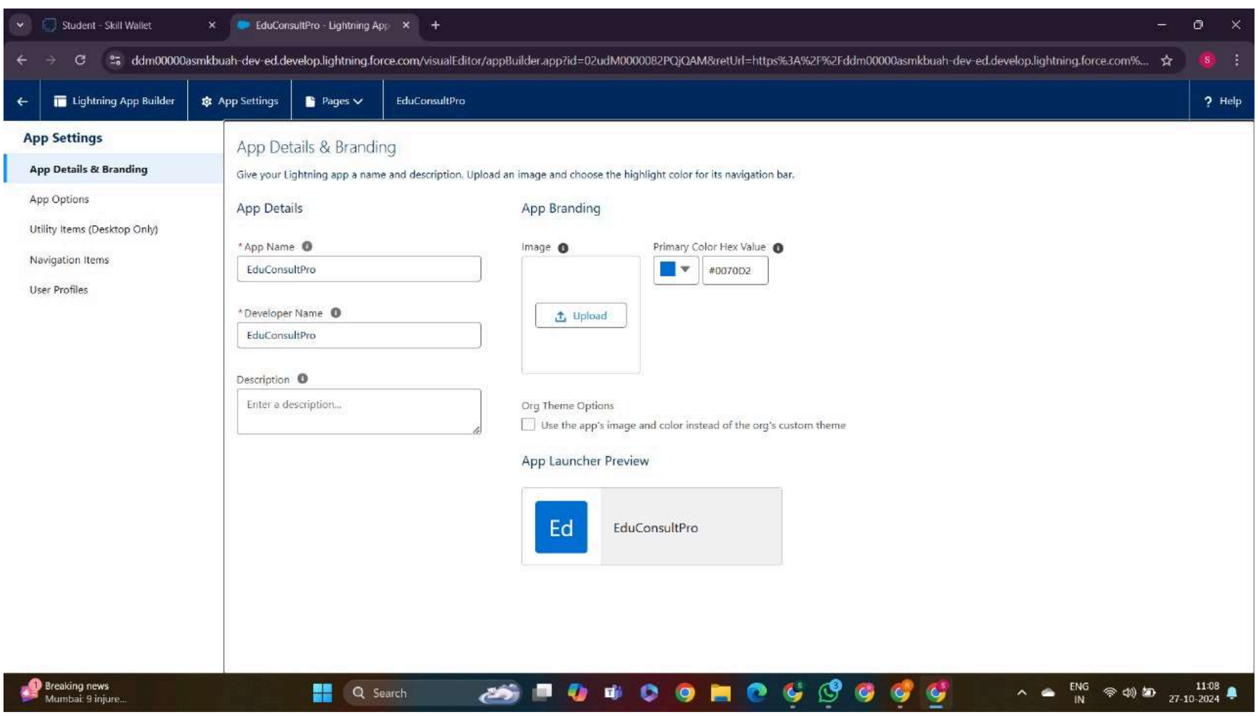
Data
Mass Transfer Approval Requests
Apps
App Manager
AppExchange Marketplace
Connected Apps
Connected Apps OAuth Usage
Manage Connected Apps
External Client Apps
External Client App Manager
OAuth Usage
SETUP
Lightning Experience App Manager
New Lightning App
New Connected App
23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type
App Name
Developer Name
Description
Last Modified ...
App T...
Vi...
1 All Tabs AllTabSet 18/08/2024, 11:51 pm Classic
2 Analytics Studio Insights Build CRM Analytics dashboards and apps 18/08/2024, 11:51 pm Classic
3 App Launcher AppLauncher App Launcher tabs 18/08/2024, 11:51 pm Classic
4 Bolt Solutions LightningBolt Discover and manage business solutions designed for your in... 18/08/2024, 11:51 pm Lightning
5 Community Community Salesforce CRM Communities 18/08/2024, 11:51 pm Classic
6 Content Content Salesforce CRM Content 18/08/2024, 11:51 pm Classic
7 Data Manager DataManager Use Data Manager to view limits, monitor usage, and manag... 18/08/2024, 11:51 pm Lightning
8 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 18/08/2024, 11:51 pm Lightning
9 EduConsultPro EduConsultPro 26/10/2024, 11:02 am Lightning
10 Hive hive 18/08/2024, 11:51 pm Community


Student - Skill Wallet
EduConsultPro - Lightning App
Lightning App Builder
App Settings
Pages
EduConsultPro
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
* App Name
EduConsultPro
* Developer Name
EduConsultPro
Description
Enter a description...
Image
Upload
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
Ed
EduConsultPro
Breaking news
Mumbai: 9 injure...
Search
ENG
IN
11:08
27-10-2024

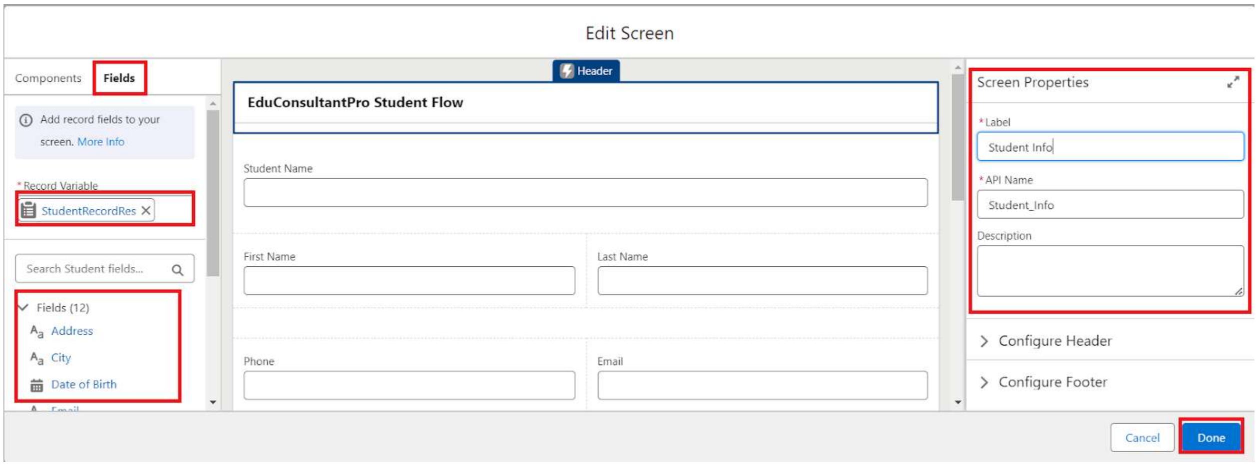
3. **Create a ScreenFlow for Student Admission Application process**

Add Screen Element

To create a **Screen Flow** in Salesforce that collects student information, follow these steps:

1. **Open Flow Builder**
   - Go to **Setup**, enter **Flow Builder** in the Quick Find box, and select it.
2. **Create a New Flow**
   - Click on **New Flow** and select **Screen Flow** as the flow type.
   - Click **Create** to start building the flow.
3. **Add a Screen Element**
   - In the **Elements** panel on the left, drag a **Screen** element onto the canvas.
   - In the **Screen Properties** pane, set the **Label** to **Student Info** to name this screen.
4. **Create and Add Fields Using a Record Variable**
   - In the **Screen** element, go to the **Fields** section.
   - Click the **+New Resource** button and select **Variable** to create a new resource.
     - Set **API Name** to **StudentRecordRes**.
     - Set **Resource Type** to **Record** and choose **Student** as the object.
     - Ensure **Available for Input** is checked to allow this resource to display fields from the Student object on the screen.
     - Click **Done** to create the resource.
5. **Drag Fields to Collect Student Information**
   - After creating **StudentRecordRes**, drag the fields you need (e.g., **Student Name, Email, Contact Number, Address** fields) from the **Fields** section onto the screen layout to build a form that collects all relevant student information.
6. **Finish Setting Up the Screen Element**
   - Adjust any layout or validation settings as needed.
   - Click **Done** to add the screen to your flow.

This will configure a screen in your flow that collects and displays student details, using fields from the **Student** object.

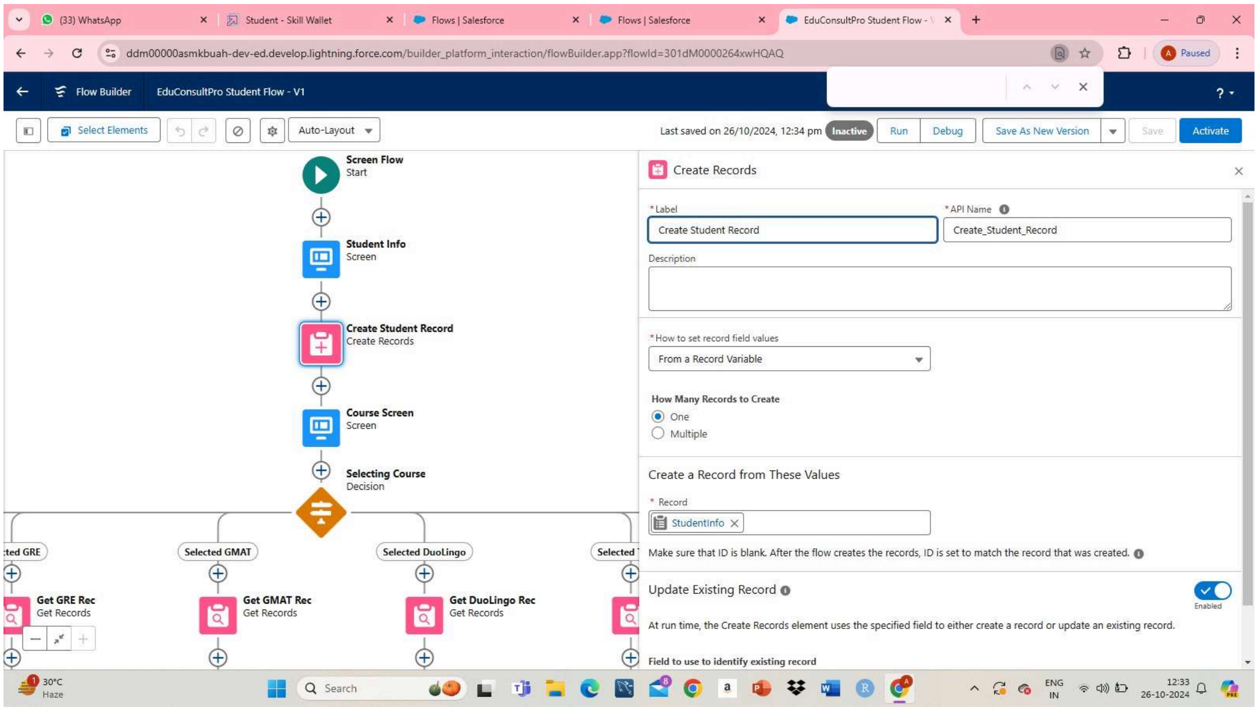


Create Student Record using Create Element

To add a **Create** element that creates a new student record after the **Student Info** screen in your Screen Flow, follow these steps:

1. **Add a Create Element**
   - After the **Student Info** screen element, go to the **Elements** panel on the left side of the Flow Builder.
   - Drag a **Create Records** element onto the canvas.
2. **Configure the Create Records Element**
   - In the **Create Records** properties pane, set the **Label** to **Create Student Record**.
   - For **How many records to create**, select **One**.
   - For **How to set the record fields**, choose **Use all values from a record**.
3. **Select the Record Variable Resource**
   - Under **Create a record from these values**, select the previously created record variable resource **StudentRecordRes** that was used in the **Student Info** screen element.
4. **Finish Configuring the Create Element**
   - Review the configuration to ensure everything is set correctly.
   - Click **Done** to save the Create Records element.

This setup will allow your flow to create a new student record in Salesforce using the information collected from the **Student Info** screen.



Add Screen Element

1. Add a Screen Element

- Drag a **Screen** element from the **Elements** panel onto the canvas, placing it after the **Create Student Record** element.
- In the **Screen Properties** pane, set the **Label** to **Course Screen**.

2. Add a Picklist Component

- Within the Course Screen properties, look for the **Components** section on the left panel.
- Drag a **Picklist** component onto the screen layout.
- In the **Picklist Properties** pane, set the following:
    - **Label**: Enter **Select Course**.
    - **API Name**: This will be automatically generated based on the label.
    - **Choices**:
        - Under **Choices**, select **New Choice**.
        - For **Label**, enter **IELTS**, then click **Done**. This will create a variable for

IELTS automatically.

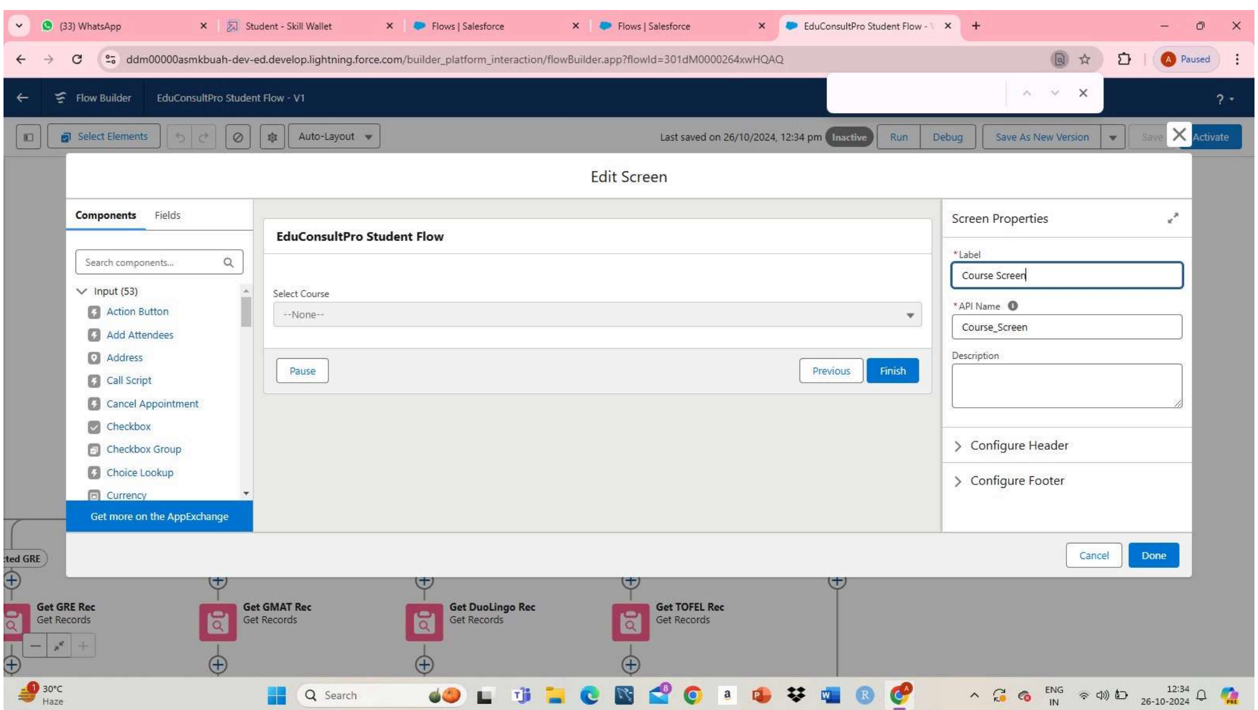
3. Add Additional Course Choices

- Repeat the process for the other courses:
  - For **GRE**:
    - Select **New Choice**, enter **GRE** for the Label, and click **Done**.
  - For **GMAT**:
    - Select **New Choice**, enter **GMAT**, and click **Done**.
  - For **Duolingo**:
    - Select **New Choice**, enter **Duolingo**, and click **Done**.
  - For **TOEFL**:
    - Select **New Choice**, enter **TOEFL**, and click **Done**.

4. Finish Configuring the Course Screen

- Once all course options are added, review the settings to ensure they are correct.
- Click **Done** to save the Course Screen element.

This configuration will allow users to select a course from the available options on the Course Screen in your flow.



Add Decision Element

1. Add a Decision Element

- Drag a **Decision** element from the **Elements** panel onto the canvas, placing it after the **Select Course Screen** element.
- In the **Decision Properties** pane, set the **Label** to **Selecting Course**.

2. Configure the First Outcome

- Under the **Outcomes** section, click on the **New Outcome** option.
- For the first outcome:
    - **Outcome Label**: Enter **Selected IELTS**.
    - **Resource**: Select **Select_Course** (this is the picklist component from the Select Course Screen).
    - **Operator**: Choose **Equals**.
    - **Value**: Enter **IELTS** (this is the choice variable for the IELTS option).

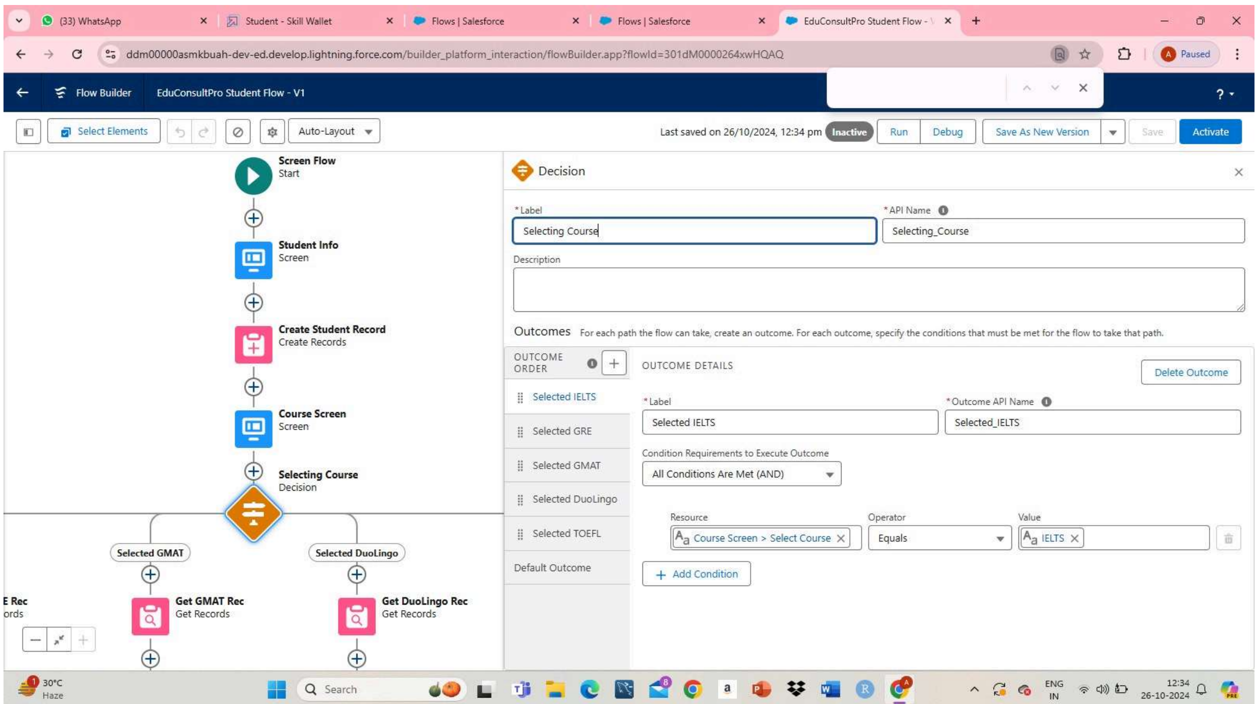
3. Add Additional Outcomes

- Click on the **+** icon to add a new outcome for the next course:
    - For **GRE**:
        - **Outcome Label**: Enter **Selected GRE**.
        - **Resource**: Select **Select_Course**.
        - **Operator**: Choose **Equals**.
        - **Value**: Enter **GRE**.
- Repeat the process for the other courses:
    - For **GMAT**:
        - **Outcome Label**: Enter **Selected GMAT**.
        - **Resource**: Select **Select_Course**.
        - **Operator**: Choose **Equals**.
        - **Value**: Enter **GMAT**.
    - For **Duolingo**:
        - **Outcome Label**: Enter **Selected Duolingo**.
        - **Resource**: Select **Select_Course**.
        - **Operator**: Choose **Equals**.
        - **Value**: Enter **Duolingo**.
    - For **TOEFL**:
        - **Outcome Label**: Enter **Selected TOEFL**.
        - **Resource**: Select **Select_Course**.

- ○ **Operator**: Choose **Equals**.
- ○ **Value**: Enter **TOEFL**.

4. Finish Configuring the Decision Element

- Once all outcomes are added, review the configuration to ensure everything is correct.
- Click **Done** to save the Decision element.



Add GET Record Element

1. Add the Get Records Element for IELTS

- Drag a **Get Records** element from the **Elements** panel onto the canvas, placing it under the **Selected IELTS** outcome path of the Decision element.
- In the **Get Records** properties pane, set the **Label** to **Get IELTS Rec**.

2. Configure the Get Records Element

- **Select Object**: Choose **Course** from the dropdown.
- **Condition Requirement**: Select **All Conditions Are Met (AND)**.
- Under **Conditions**:
  - ■ **Field**: Select **Course Name**.

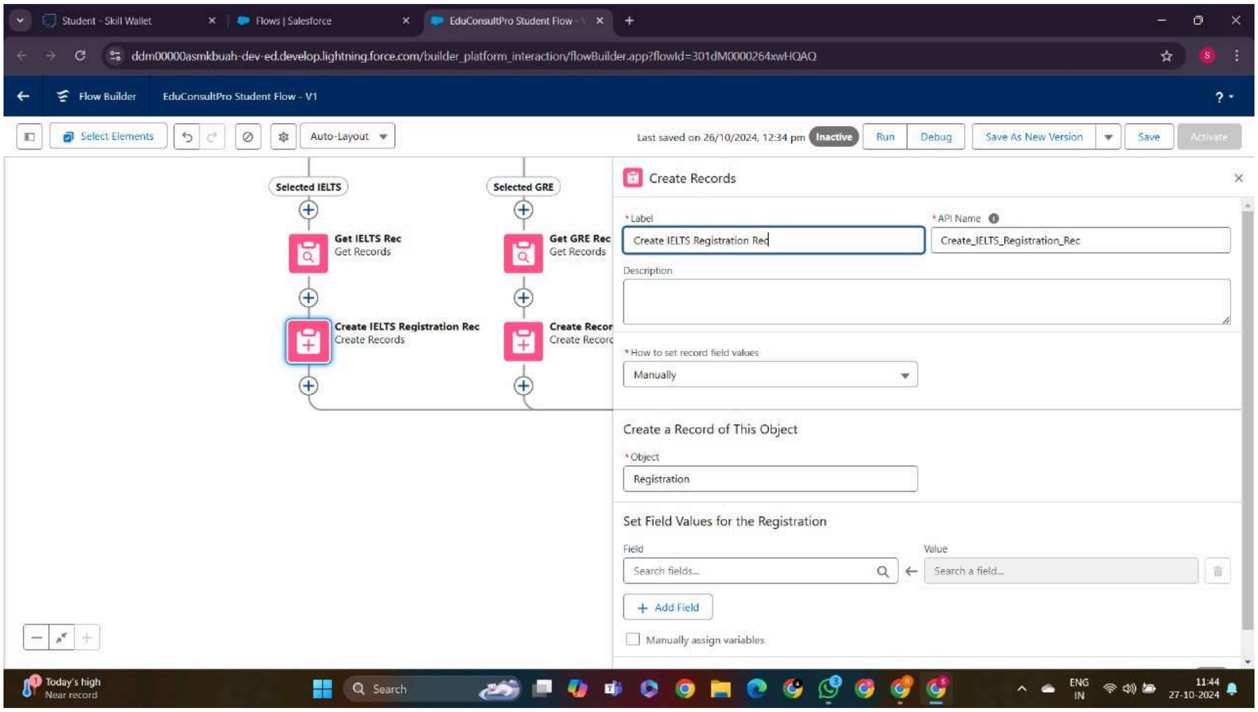
        - **Operator**: Choose **Equals**.
        - **Value**: Set to **{!Select_Course}** (this references the value from the picklist).

3. Add Get Records Element for Other Courses

- Repeat the above steps for each of the other course paths (GRE, GMAT, Duolingo, and TOEFL):
    - **For GRE**:
        - Label: **Get GRE Rec**
        - Object: **Course**
        - Condition Requirement: **All Conditions Are Met (AND)**
        - Field: **Course Name**
        - Operator: **Equals**
        - Value: **{!Select_Course}**
    - **For GMAT**:
        - Label: **Get GMAT Rec**
        - Object: **Course**
        - Condition Requirement: **All Conditions Are Met (AND)**
        - Field: **Course Name**
        - Operator: **Equals**
        - Value: **{!Select_Course}**
    - **For Duolingo**:
        - Label: **Get Duolingo Rec**
        - Object: **Course**
        - Condition Requirement: **All Conditions Are Met (AND)**
        - Field: **Course Name**
        - Operator: **Equals**
        - Value: **{!Select_Course}**
    - **For TOEFL**:
        - Label: **Get TOEFL Rec**
        - Object: **Course**
        - Condition Requirement: **All Conditions Are Met (AND)**
        - Field: **Course Name**
        - Operator: **Equals**
        - Value: **{!Select_Course}**

4. Finish Configuring the Get Records Elements

- After configuring each **Get Records** element, review their settings to ensure correctness.
- Click **Done** for each Get Records element to save your configurations.


Student - Skill Wallet
Flows | Salesforce
EduConsultPro Student Flow
ddm00000asmkbuah-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301dM0000264xwHQAQ
Flow Builder
EduConsultPro Student Flow - V1
Select Elements
Auto-Layout
Last saved on 26/10/2024, 12:34 pm
Inactive
Run
Debug
Save As New Version
Save
Activate
Selected IELTS
Selected GRE
Get IELTS Rec
Get Records
Get GRE Rec
Get Records
Create IELTS Registration Rec
Create Records
Create Records
*Label
Create IELTS Registration Rec
*API Name
Create_IELTS_Registration_Rec
Description
*How to set record field values
Manually
Create a Record of This Object
*Object
Registration
Set Field Values for the Registration
Field
Search fields...
Value
Search a field...
Add Field
Manually assign variables
Today's high
Near record
Search
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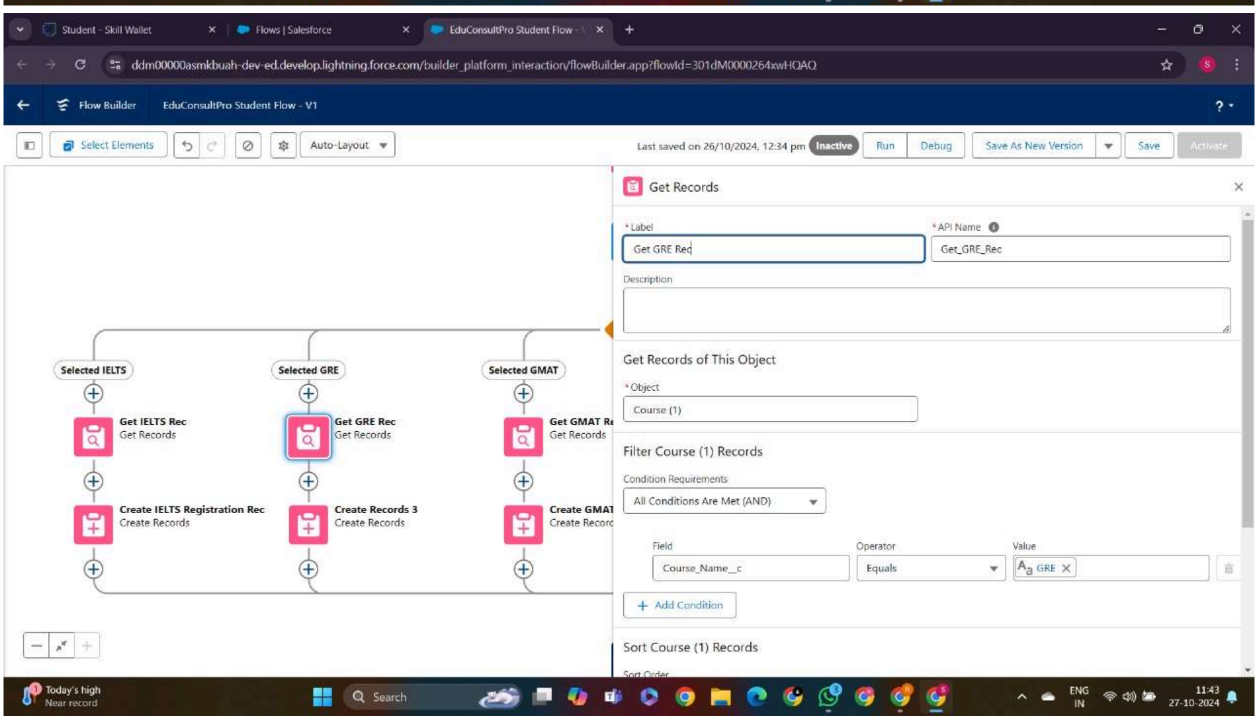
27-10-2024


Student - Skill Wallet
Flows | Salesforce
EduConsultPro Student Flow
ddm00000asmkbuah-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301dM0000264xwHQAQ
Flow Builder
EduConsultPro Student Flow - V1
Select Elements
Auto-Layout
Last saved on 26/10/2024, 12:34 pm
Inactive
Run
Debug
Save As New Version
Save
Activate
Selected IELTS
Selected GRE
Selected GMAT
Get IELTS Rec
Get Records
Get GRE Rec
Get Records
Create IELTS Registration Rec
Create Records
Create Records 3
Create Records
Get Records
*Label
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*API Name
Get_GRE_Rec
Description
Get Records of This Object
*Object
Course (1)
Filter Course (1) Records
Condition Requirements
All Conditions Are Met (AND)
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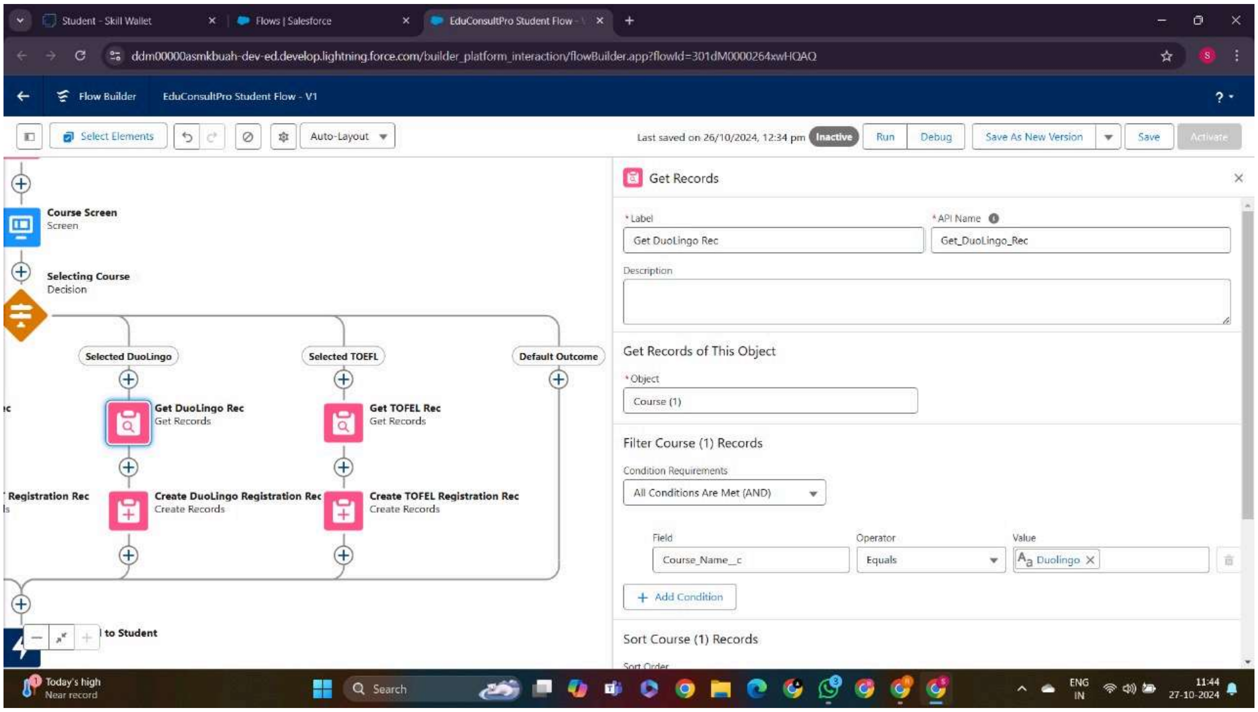
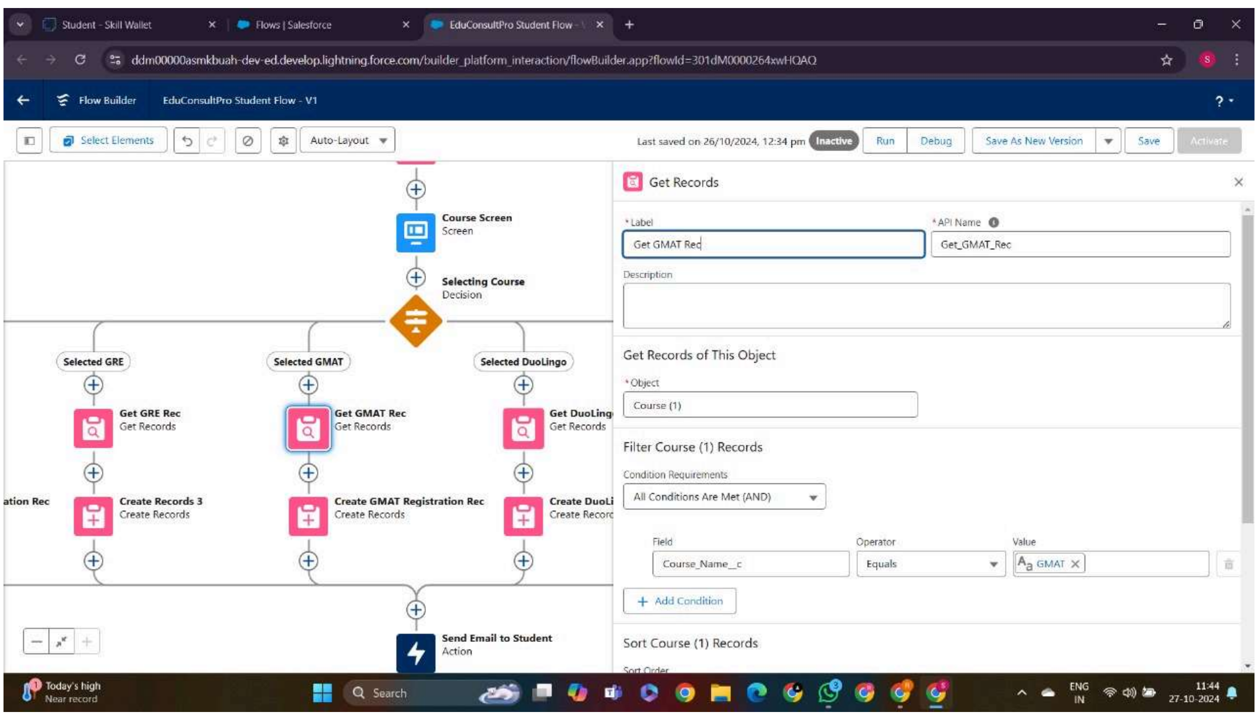
Add Condition
Sort Course (1) Records
Sort Order
Today's high
Near record
Search
ENG
IN
11:43
27-10-2024


Student - Skill Wallet
Flows | Salesforce
EduConsultPro Student Flow
ddm00000asmkbuah-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301dM0000264xwHQAQ
Flow Builder
EduConsultPro Student Flow - V1
Select Elements
Auto-Layout
Last saved on 26/10/2024, 12:34 pm
Inactive
Run
Debug
Save As New Version
Save
Activate
Course Screen
Screen
Selecting Course
Decision
Selected DuoLingo
Selected TOEFL
Default Outcome
Get DuoLingo Rec
Get Records
Get TOFEL Rec
Get Records
Create DuoLingo Registration Rec
Create Records
Create TOFEL Registration Rec
Create Records
Get Records
Label
Get DuoLingo Rec
API Name
Get_DuoLingo_Rec
Description
Get Records of This Object
Object
Course (1)
Filter Course (1) Records
Condition Requirements
All Conditions Are Met (AND)
Field
Operator
Value
Course_Name__c
Equals
Duolingo
Add Condition
Sort Course (1) Records
Today's high
Near record
Search
11:44
27-10-2024


Student - Skill Wallet
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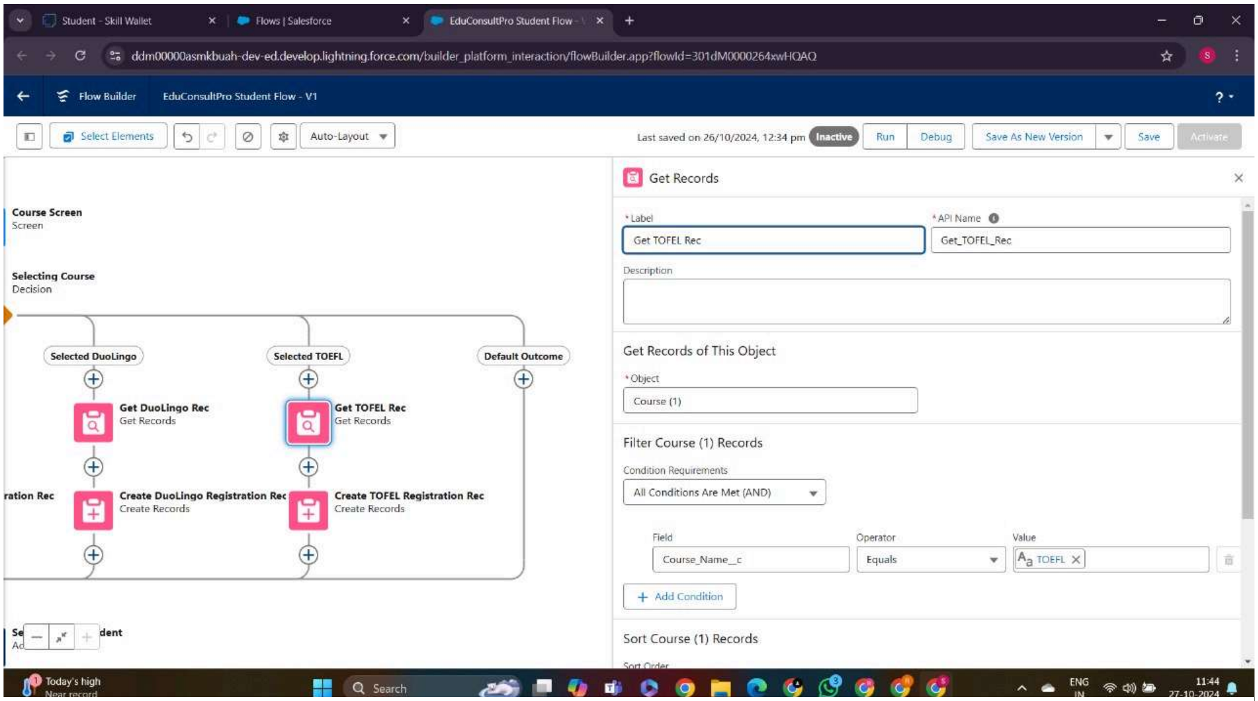
Activate
Course Screen
Screen
Selecting Course
Decision
Selected GRE
Selected GMAT
Selected DuoLingo
Get GRE Rec
Get Records
Get GMAT Rec
Get Records
Create Records 3
Create Records
Create GMAT Registration Rec
Create Records
Send Email to Student
Action
Get Records
Label
Get GMAT Rec
API Name
Get_GMAT_Rec
Description
Get Records of This Object
Object
Course (1)
Filter Course (1) Records
Condition Requirements
All Conditions Are Met (AND)
Field
Operator
Value
Course_Name__c
Equals
GMAT
Add Condition
Sort Course (1) Records
Today's high
Near record
Search
11:44
27-10-2024



Create Registration Record using Create Records

1. Add Create Records Element for IELTS

- Drag a **Create Records** element from the **Elements** panel onto the canvas, placing it after the **Get IELTS Rec** element.
- In the **Create Records** properties pane, set the **Label** to **Create IELTS Registration Rec**.

2. Configure the Create Records Element

- **How many records to create**: Select **One**.
- **How to set the record fields**: Choose **Use separate resources, and literal values**.

Set Field Values:

- **Select Object**: Choose **Registration**.
- **Field**:
    - **Course_Name__c**:
        - **Value**: Set to **{!Get_IELTS_Rec.Id}**.
    - **Field**:
        - **Student_Name__c**:
            - **Value**: Set to **{!StudentRecordRes.Id}**.

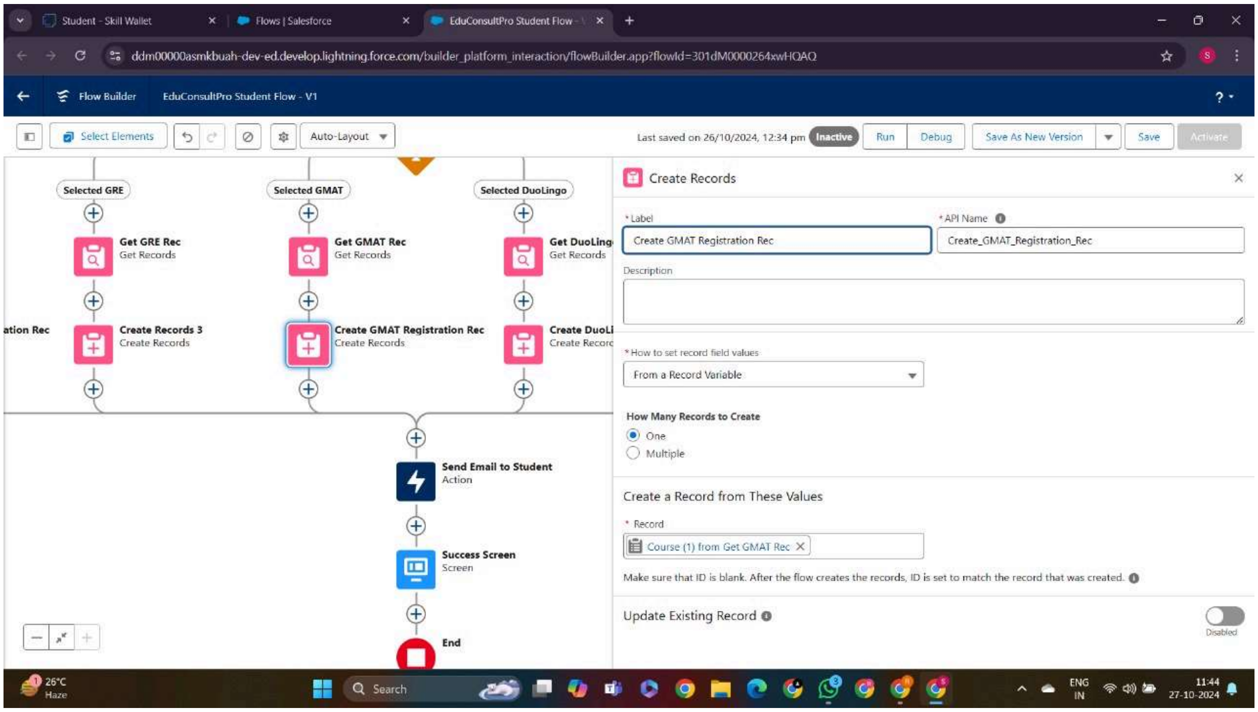
3. Add Create Records Elements for Other Courses

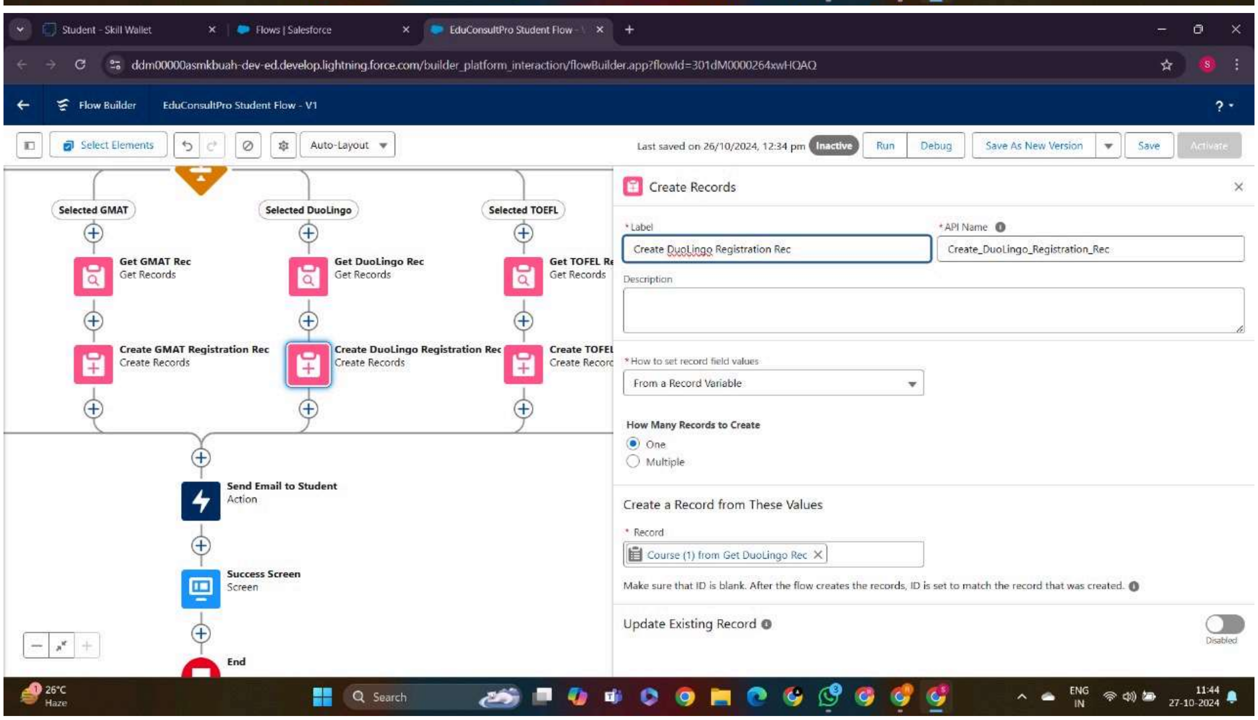
Repeat the above steps for each of the other course paths (GRE, GMAT, Duolingo, and TOEFL):

- **For GRE**:
    - **Label**: **Create GRE Registration Rec**
    - **Object**: **Registration**
    - **Field**:
        - **Course_Name__c**:
            - **Value**: **{!Get_GRE_Rec.Id}**.
        - **Student_Name__c**:
            - **Value**: **{!StudentRecordRes.Id}**.
- **For GMAT**:
    - **Label**: **Create GMAT Registration Rec**
    - **Object**: **Registration**
    - **Field**:
        - **Course_Name__c**:
            - **Value**: **{!Get_GMAT_Rec.Id}**.
        - **Student_Name__c**:
            - **Value**: **{!StudentRecordRes.Id}**.
- **For Duolingo**:
    - **Label**: **Create Duolingo Registration Rec**
    - **Object**: **Registration**
    - **Field**:
        - **Course_Name__c**:
            - **Value**: **{!Get_Duolingo_Rec.Id}**.
        - **Student_Name__c**:
            - **Value**: **{!StudentRecordRes.Id}**.
- **For TOEFL**:
    - **Label**: **Create TOEFL Registration Rec**
    - **Object**: **Registration**
    - **Field**:
        - **Course_Name__c**:
            - **Value**: **{!Get_TOEFL_Rec.Id}**.
        - **Student_Name__c**:
            - **Value**: **{!StudentRecordRes.Id}**.

4. Finish Configuring the Create Records Elements

- After configuring each **Create Records** element, review their settings to ensure correctness.
- Click **Done** for each Create Records element to save your configurations.


Flow Builder
EduConsultPro Student Flow - V1
Last saved on 26/10/2024, 12:34 pm
Inactive
Run
Debug
Save As New Version
Save
Activate
Selected GRE
Selected GMAT
Selected DuoLingo
Get GRE Rec
Get Records
Get GMAT Rec
Get Records
Create Records 3
Create Records
Create GMAT Registration Rec
Create Records
Send Email to Student
Action
Success Screen
Screen
End
Create Records
Label
Create GMAT Registration Rec
API Name
Create_GMAT_Registration_Rec
Description
How to set record field values
From a Record Variable
How Many Records to Create
One
Multiple
Create a Record from These Values
Record
Course (1) from Get GMAT Rec
Make sure that ID is blank. After the flow creates the records, ID is set to match the record that was created.
Update Existing Record
Disabled


Flow Builder
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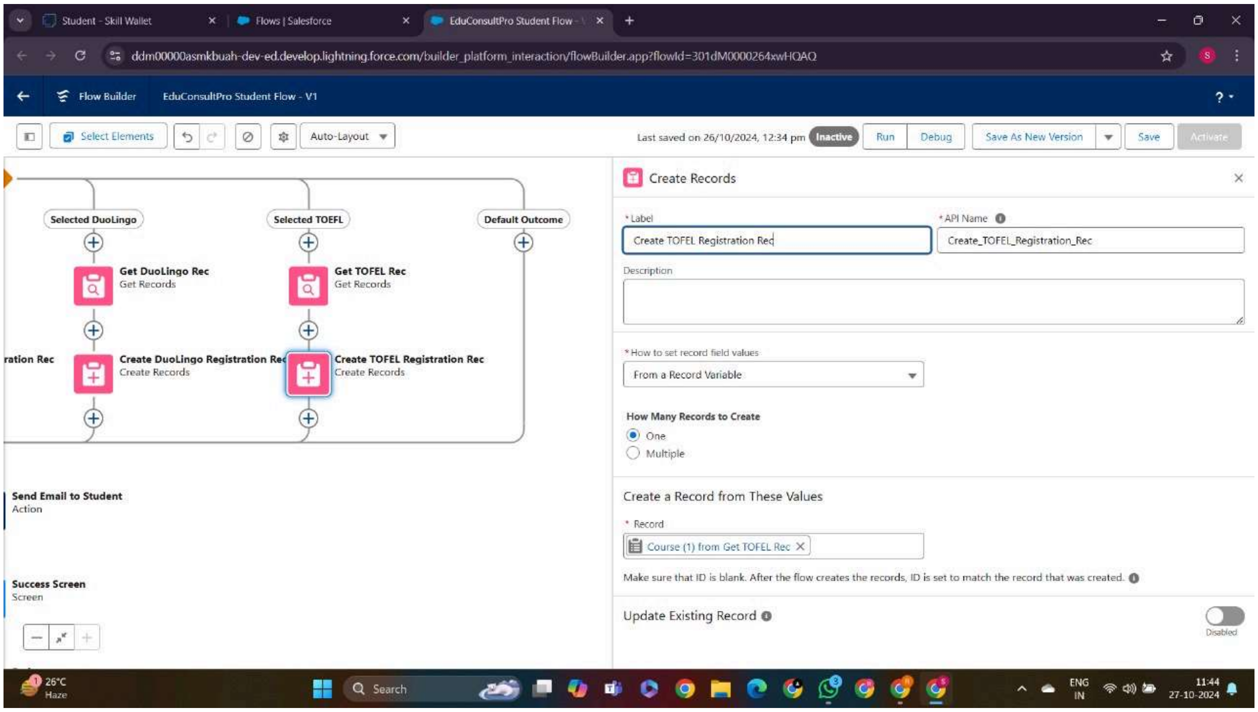
Get GMAT Rec
Get Records
Get DuoLingo Rec
Get Records
Create GMAT Registration Rec
Create Records
Create DuoLingo Registration Rec
Create Records
Send Email to Student
Action
Success Screen
Screen
End
Create Records
Label
Create DuoLingo Registration Rec
API Name
Create_DuoLingo_Registration_Rec
Description
How to set record field values
From a Record Variable
How Many Records to Create
One
Multiple
Create a Record from These Values
Record
Course (1) from Get DuoLingo Rec
Make sure that ID is blank. After the flow creates the records, ID is set to match the record that was created.
Update Existing Record
Disabled



Create Email Text Template Variables for email body and subject

1. Create the Text Template for Email Body

1. **Access the Toolbox**:
   - Click on the toggle toolbox located at the left corner of the Flow Builder.
2. **Create a New Resource**:
   - Click on **New Resource**.
   - Select **Text Template** as the Resource Type.
3. **Configure the Text Template**:
   - **API Name**: Enter **StuRegistrationEmailTextTempBody**.
   - **View As**: Select **Plain Text**.
   - **Body**: Paste the following text:

Dear {!StudentRecordRes.Name},

Congratulations and welcome to EduConsultantPro!

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

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

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

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

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

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

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

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

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

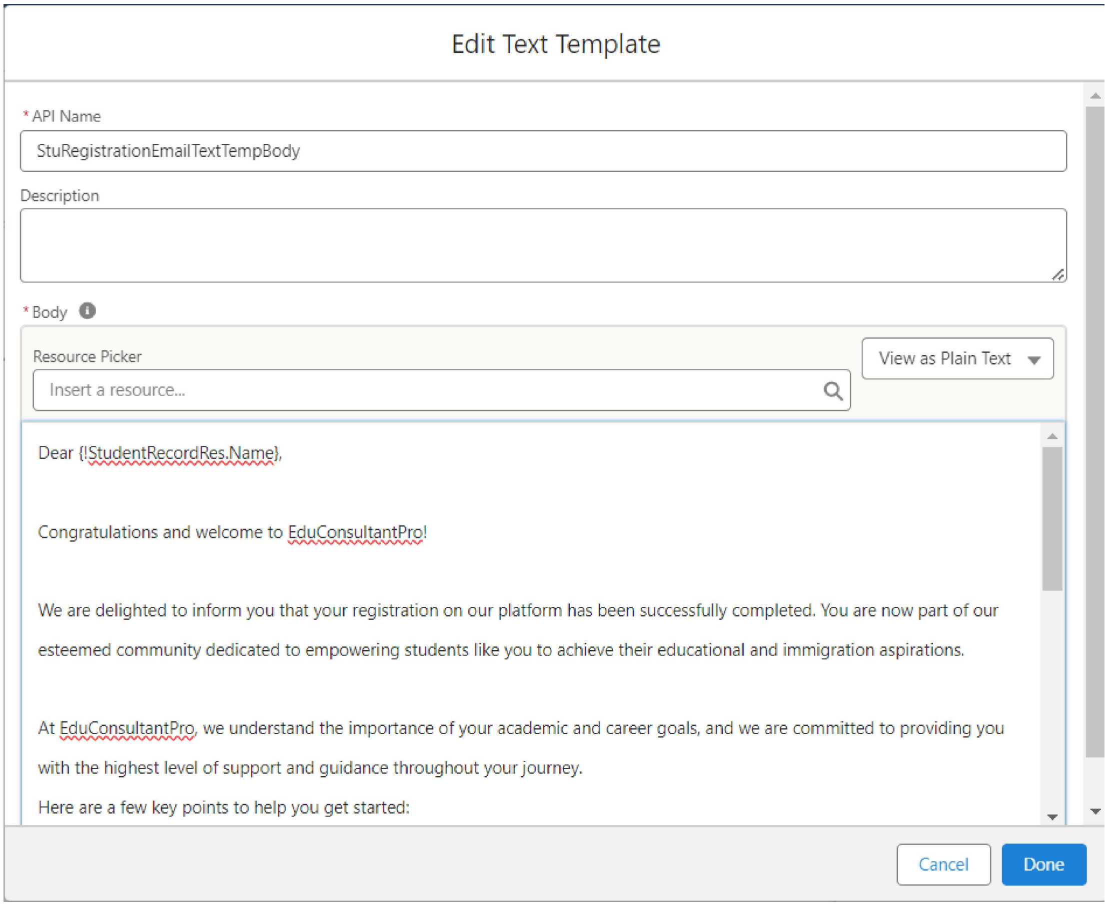
Thank you.

1. **Click Done**: Save the text template.

2. Create the Text Template for Email Subject

1. **Repeat the Accessing the Toolbox**:
   - Click on the toggle toolbox located at the left corner of the Flow Builder.
2. **Create a New Resource**:
   - Click on **New Resource**.
   - Select **Text Template** as the Resource Type.
3. **Configure the Text Template**:
   - **API Name**: Enter **StuRegistrationEmailTextTempSub**.
   - **View As**: Select **Plain Text**.

- Your Registration with EduConsultantPro is Complete!

4. **Click Done**: Save the text template.
5. 

Add an Action Element

1. Add the Action Element

1. **Drag the Action Element**:
   - From the **Elements** panel, drag an **Action** element onto the canvas, placing it after all the decision paths (IELTS, GRE, GMAT, Duolingo, TOEFL).
2. **Configure the Action Element**:
   - In the **Action Properties** pane, set the **Label** to **Send Email to Student**.

2. Set Input Values for the Selected Action

1. **Select Action Type**:
   - Under **Set Input Values for Selected Action**, you will need to configure the following inputs:
2. **Configure Input Values**:

- **Body**:
  - Set the value to **{!StuRegistrationEmailTextTempBody}** (the text template for the email body you created earlier).
- **Recipient Address List**:
  - Set the value to **{!StudentRecordRes.Email__c}** (the email address field from the student record).
- **Subject**:
  - Set the value to **{!StuRegistrationEmailTextTempSub}** (the text template for the email subject you created earlier).

3. Finish Configuring the Action Element

1. **Review the Configuration**:
   - Make sure all input values are correctly set.
2. **Click Done**: Save the action element configuration.

Add Screen Element

1. Add the Screen Element

1. **Drag the Screen Element**:
   - From the **Elements** panel, drag a **Screen** element onto the canvas, placing it after the **Send Email to Student** action element.
2. **Configure the Screen Element**:
   - In the **Screen Properties** pane, set the **Label** to **Success Screen**.

2. Add a Display Text Component

1. **Search for Display Text Component**:
   - In the left side panel, use the search box to find the **Display Text** component.
2. **Drag Display Text to the Screen**:
   - Drag the **Display Text** component into the main panel of the **Success Screen**.
3. **Configure Display Text Component**:
   - Set the **Label** to **SuccessMessage**.
4. **Paste Text in Resource Picker Box**:
   - In the **Resource Picker** box, paste the following text:

Dear {!StudentRecordRes.Name},

Congratulations and welcome to EduConsultantPro!

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

Your registration details have been sent through email; kindly check it once.

Thank you.

3. Finish Configuring the Success Screen

1. **Click Done**: Save the screen element configuration.

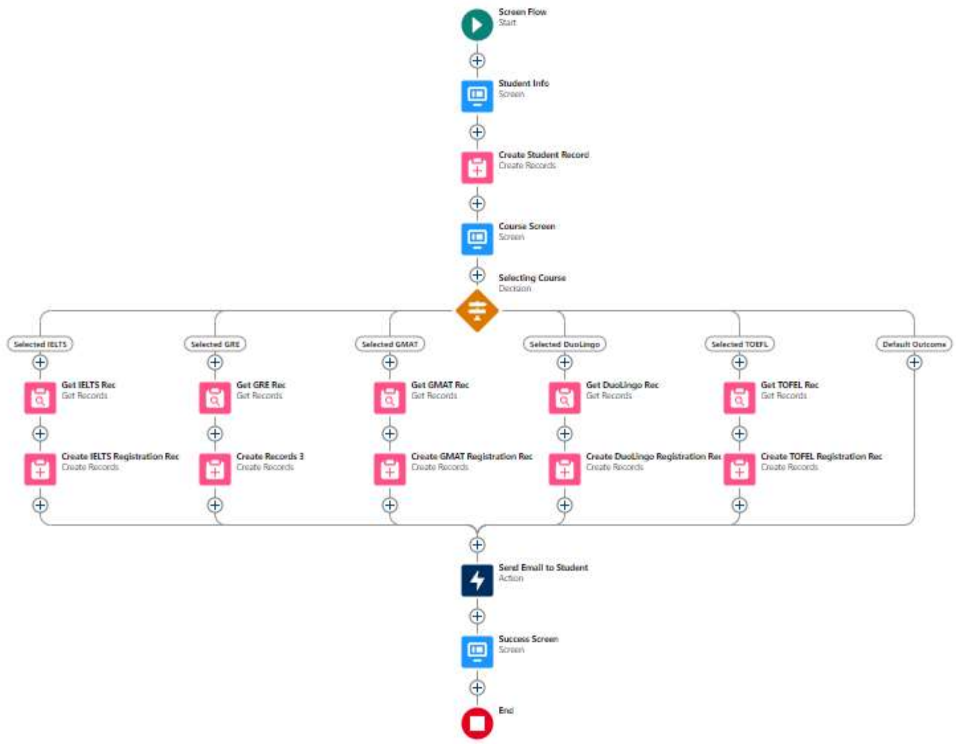
4. Save the Flow

1. **Save the Flow**:
   - Click on **Save** in the top right corner of the Flow Builder.
   - In the dialog box, enter the flow name as **EduConsultPro Student Flow**.

5. Flow Overview

Once completed, your flow should have the following structure:

- **Student Info Screen**
- **Create Student Record Element**
- **Course Screen**
- **Decision Element (Selecting Course)**
- **Get Records Element for IELTS**
- **Get Records Element for GRE**
- **Get Records Element for GMAT**
- **Get Records Element for Duolingo**
- **Get Records Element for TOEFL**
- **Create Records Element for IELTS Registration**
- **Create Records Element for GRE Registration**
- **Create Records Element for GMAT Registration**
- **Create Records Element for Duolingo Registration**
- **Create Records Element for TOEFL Registration**
- **Action Element (Send Email to Student)**
- **Success Screen**



Screen Flow
Start
Student Info
Screen
Create Student Record
Create Records
Course Screen
Screen
Selecting Course
Decision
Selected IELTS
Selected GRE
Selected GMAT
Selected DuoLingo
Selected TOEFL
Default Outcome
Get IELTS Rec
Get Records
Get GRE Rec
Get Records
Get GMAT Rec
Get Records
Get DuoLingo Rec
Get Records
Get TOFEL Rec
Get Records
Create IELTS Registration Rec
Create Records
Create Records 3
Create Records
Create GMAT Registration Rec
Create Records
Create DuoLingo Registration Rec
Create Records
Create TOFEL Registration Rec
Create Records
Send Email to Student
Action
Success Screen
Screen
End

Create Users

User

1. Navigate to New User Setup

1. **Go to Setup**: Click on the gear icon (⚙) in the top right corner of your Salesforce interface and select **Setup**.
2. **Find Users**:
   - In the **Quick Find** box on the left, type **Users** and select **Users** under the **Administration** section.
3. **Create New User**: Click on the **New User** button.

2. Fill in User Details

1. **Last Name**: Enter **Consultant** in the **Last Name** field.
2. **License**:
   - In the **User License** dropdown, select **Salesforce Platform**.
3. **Profile**:
   - In the **Profile** dropdown, choose **Standard Platform User**.

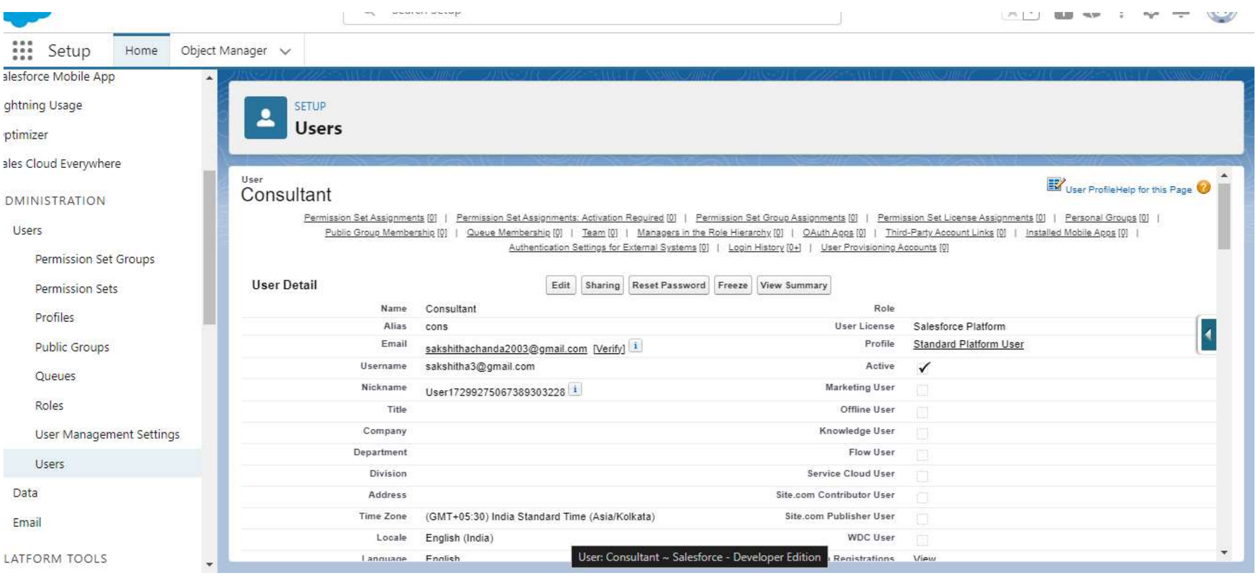
3. Fill in Mandatory Fields

Make sure to fill in all mandatory fields, which typically include:

- **First Name**: Enter the user's first name (e.g., **John**).
- **Username**: Enter a unique username (usually in the form of an email address).
- **Email**: Enter the user's email address (this should also be unique).
- **Alias**: Enter a short alias for the user (usually 3-5 characters).
- **Role**: If applicable, select a role from the dropdown.
- **Active**: Ensure the **Active** checkbox is checked to enable the user.

4. Save the User

- After filling in all the necessary fields, click on the **Save** button.



Configure the User Settings

1. Navigate to User Settings

1. **Go to Setup**: Click on the gear icon ( ) in the top right corner of your Salesforce interface and select **Setup**.
2. **Find Users**:
   - In the **Quick Find** box on the left, type **Users** and select **Users** under the **Administration** section.
3. **Locate Your User**: Find your user profile in the list of users. You can use the search bar if needed.

2. Edit User Details

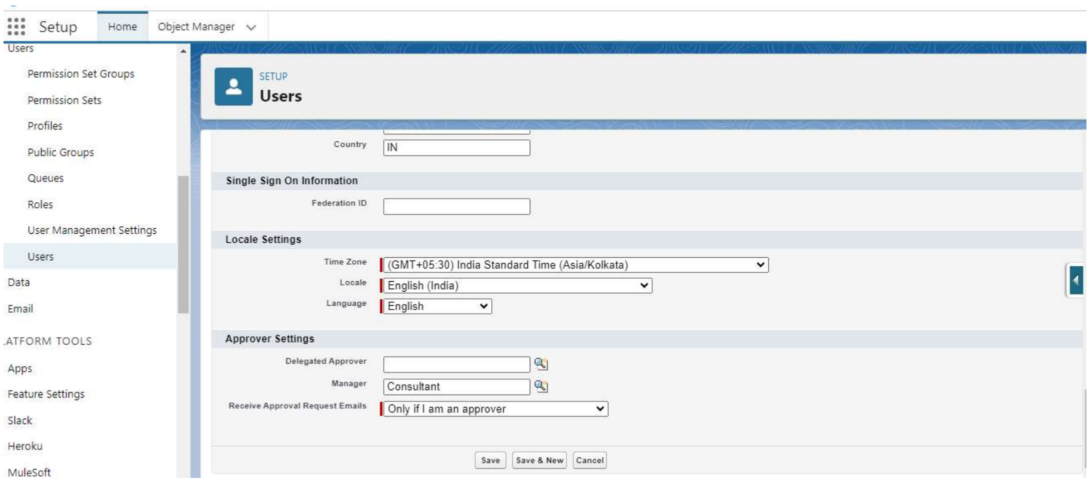
1. **Click Edit**: Next to your name, click on the **Edit** button to modify your user settings.

3. Configure Approver Settings

1. **Scroll to Approver Settings**: Scroll down to the **Approver Settings** section.
2. **Select Manager**:
   - In the **Manager** field dropdown, select **Consultant** (or whichever name corresponds to the consultant user you created earlier).

4. Save Changes

Click Save: After selecting the manager, click on the **Save** button at the bottom of the page.


Setup
Home
Object Manager
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
.ATFORM TOOLS
Apps
Feature Settings
Slack
Heroku
MuleSoft
SETUP
Users
Country
IN
Single Sign On Information
Federation ID
Locale Settings
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale
English (India)
Language
English
Approver Settings
Delegated Approver
Manager
Consultant
Receive Approval Request Emails
Only if I am an approver
Save
Save & New
Cancel

Create an Approval Process for Property Object

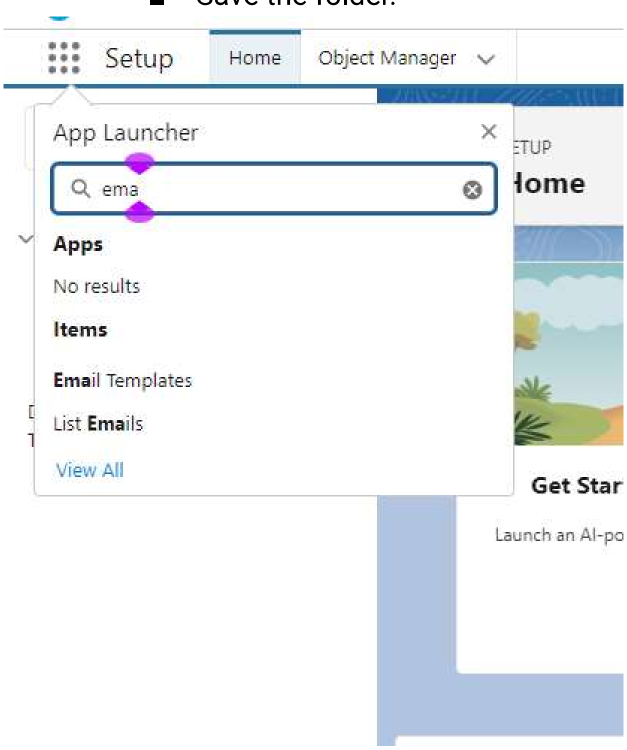
Create an Email Template

Step 1: Enable Lightning Email Templates

1. **Go to Setup**: Click on the gear icon (⚙) in the top right corner and select **Setup**.
2. **Search for Templates**: In the **Quick Find** box, type **Templates** and select **Lightning Email Templates**.
3. **Toggle On**: Make sure that **Lightning Email Templates** are enabled.

Step 2: Create a Folder for the Templates

1. **Go to App Launcher**: Open the App Launcher (grid icon) and search for **Email Templates**.
2. **Create New Folder**:
   - Click **New Folder**.
   - Name the folder, for example, **Appointment Notifications**.
   - Save the folder.



Step 3: Create the Approval Template

1. **New Email Template**: Click **New Email Template**.

2. **Folder Selection**: Choose the folder you created (e.g., **Appointment Notifications**).
3. **Template Details**:
    - **Template Name**: Approval Template
    - **Subject**: Appointment Request Approved

Dear {{{Appointment__c.Student_Name__c}}},

We're pleased to inform you that your appointment request has been approved.

Appointment Details:
Appointment No : {{{Appointment__c.Name}}},
Student Name : {{{Appointment__c.Student_Name__c}}},
Consultant Name : {{{Appointment__c.Consultant__c}}},
Date & Time : {{{Appointment__c.Appointment_DateTime__c}}},
Purpose : {{{Appointment__c.PurposeTopic__c}}}

We look forward to assisting you with your goals. Should you have any questions, feel free to reach out.

Best regards,

{{{Recipient.Name}}},
EduConsultantPro

1. **Save** the template.

Step 4: Create the Rejection Template

1. **New Email Template**: Click **New Email Template**.
2. **Folder Selection**: Choose the same folder (e.g., **Appointment Notifications**).
3. **Template Details**:
    - **Template Name**: Rejection Template
    - **Subject**: Appointment Request Rejected

Dear {{{Appointment__c.Student_Name__c}}},

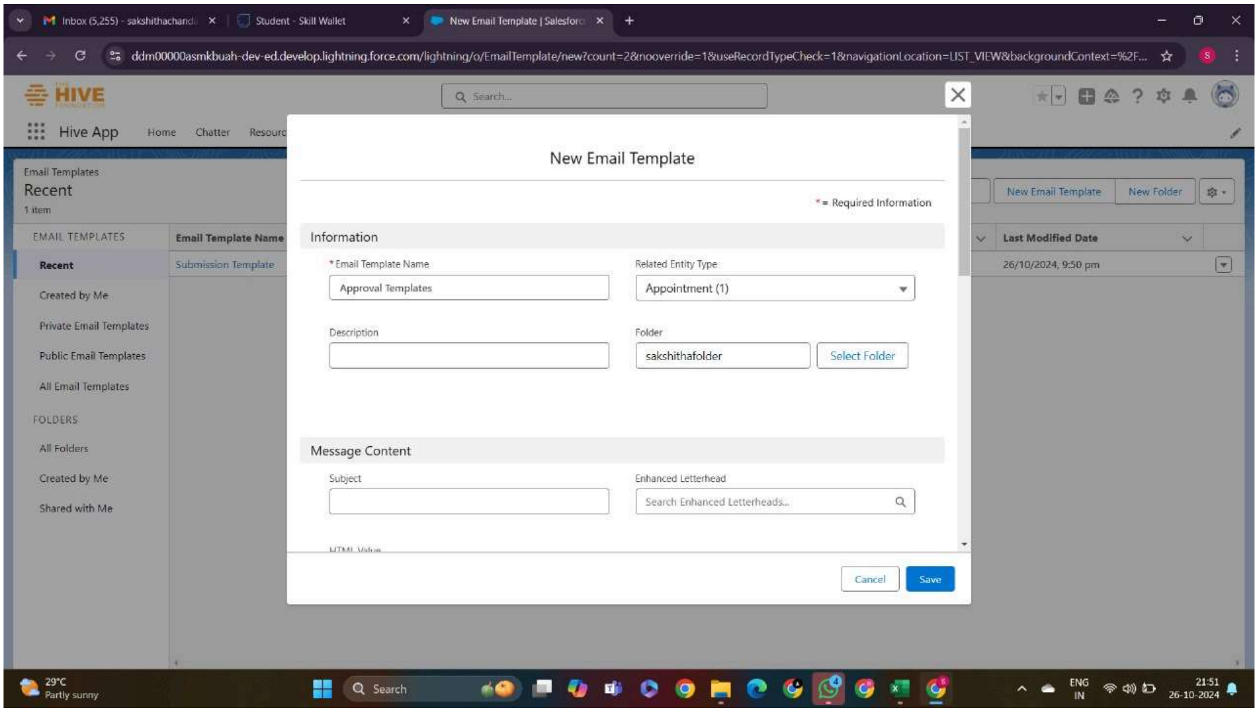
Unfortunately, we are unable to approve your appointment request.

Reason for Rejection: {{{Appointment__c.Rejection_Reason__c}}}

If you'd like to discuss this further or need additional assistance, please feel free to contact us.

Best regards,

{{{Recipient.Name}}},
EduConsultantPro
4.Save the template.



Create an Approval Process

Step 1: Access Approval Processes

1. **Go to Setup**: Click on the gear icon ( ) in the top right corner and select **Setup**.
2. **Search for Approval Processes**: In the **Quick Find** box, enter **Approval** and select **Approval Processes**.

Step 2: Start a New Approval Process for Appointment

1. **Select Appointment**: In **Manage Approval Processes For**, choose **Appointment** from the dropdown list.
2. **Create New Approval Process**: Click **Create New Approval Process** and select **Use Jump Start Wizard**.

Step 3: Configure the Approval Process

1. **Process Name**: Enter **Appointment Approval**.
2. **Select Approver**:
   - Choose **Automatically assign an approver using a standard or custom hierarchy field**.
   - Select **Manager** as the approver.
3. Click **Next**.

Step 4: Define Automated Approver Determination

1. **Next Automated Approver Determined By**: Select **Manager**.

Step 5: Set Record Editability

1. In **Record Editability Properties**, select **Administrators OR the currently assigned approver can edit records during the approval process**.
2. **Save** the approval process.

Step 6: Define Initial Submission Actions

1. Click on **View Approval Process Detail Page**.
2. **Add New Field Update**:
   - Under **Initial Submission Actions**, click **Add New** and select **Field Update**.
   - Set the following values:
     - **Name**: Submitted
     - **Field to Update**: **Appointment: Status**
     - **A Specific value**: Set to **Pending**
3. **Save** this Field Update.

Step 7: Add Email Alert for Submission

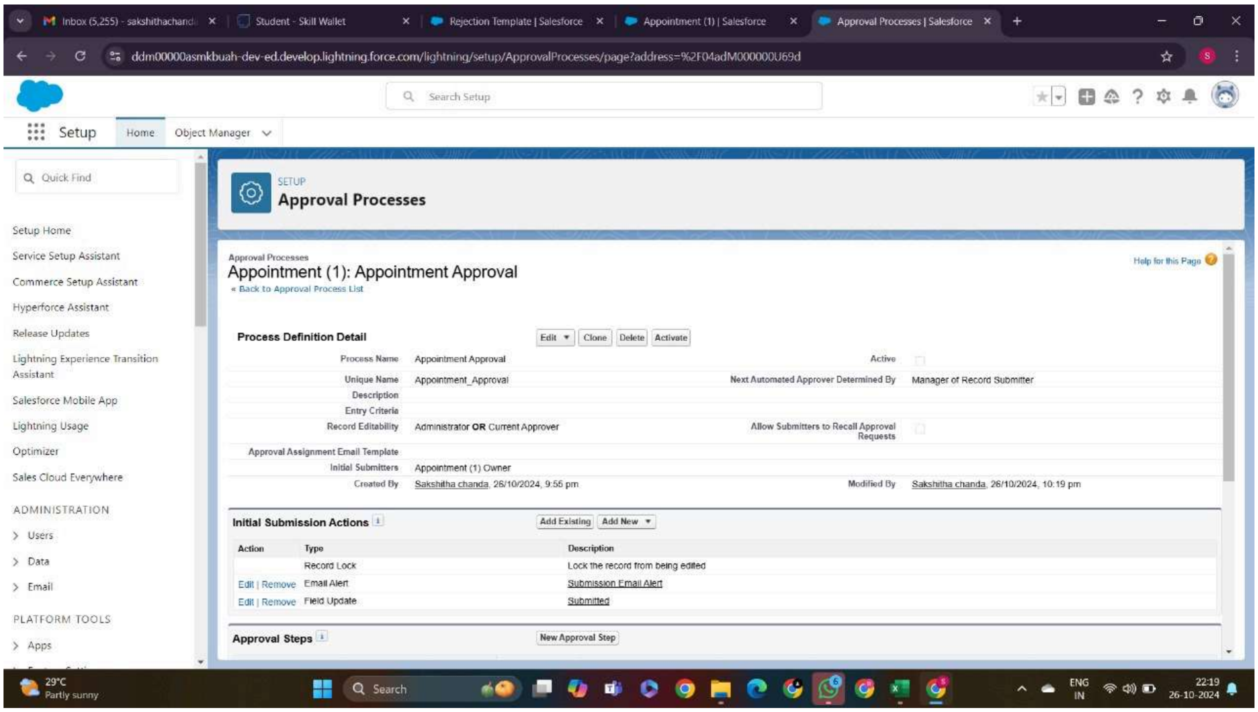
1. Under **Initial Submission Actions**, click **Add New** again and select **Email Alert**.
2. **Email Alert Configuration**:
   - **Description**: Submission Email Alert
   - **Unique Name**: Auto Populates
   - **Email Template**: Choose **Submission Template**.
   - **Recipient Type**: Select **Your Name**.
3. **Save** the Email Alert.

Step 8: Add Final Approval and Rejection Actions

1. **Final Approval Actions**: Repeat **Steps 6 and 7** to add **Field Update** and **Email Alert** actions for **Final Approval**.

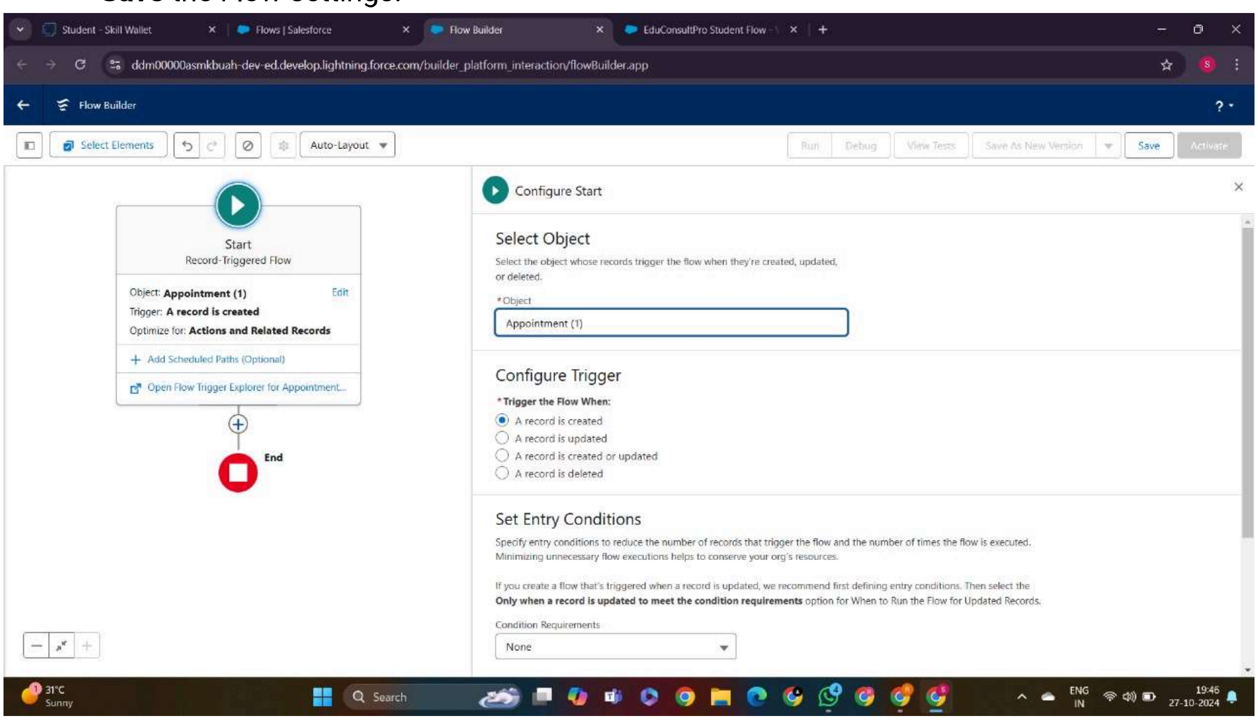
2. **Final Rejection Actions**: Repeat **Steps 6 and 7** for **Final Rejection**.

This configuration ensures that your **Appointment Approval Process** is set up with all necessary submission, approval, and rejection actions for efficient processing.



Create a Record Triggered Flow

- **Go to Setup**:
    - Click on the gear icon (⚙) in the top right corner and select **Setup**.
- **Access Flows**:
    - In the **Quick Find** box, type **Flows** and select **Flows** from the list.
- **Create a New Flow**:
    - Click on **New Flow**.
    - Select **Record-Triggered Flow**.
    - Click **Create** to open the **Configure Start** window.
- **Configure Start Element**:
    - **Object**: Choose **Appointment** from the dropdown.
    - **Trigger the Flow When**: Select **A record is created** to ensure the flow is triggered whenever a new **Appointment** record is added.
- **Save** the Flow settings.

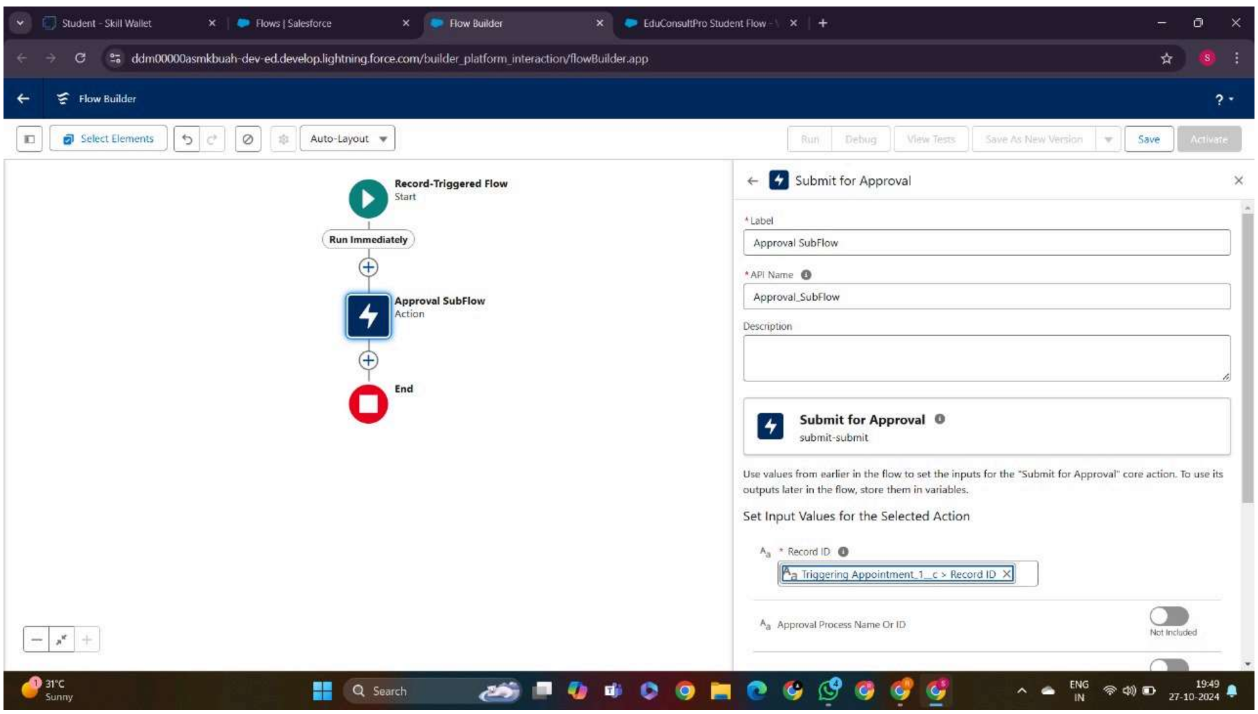


Add an Action Element

- **Open the Flow Builder**:
    - After completing the Start Element configuration for your **Record-Triggered Flow** on **Appointment**.
- **Add an Action Element**:

- From the elements menu on the left, drag **Action** and drop it onto the flow canvas after the **Start Element**.
- **Label** the action as **Approval SubFlow**.

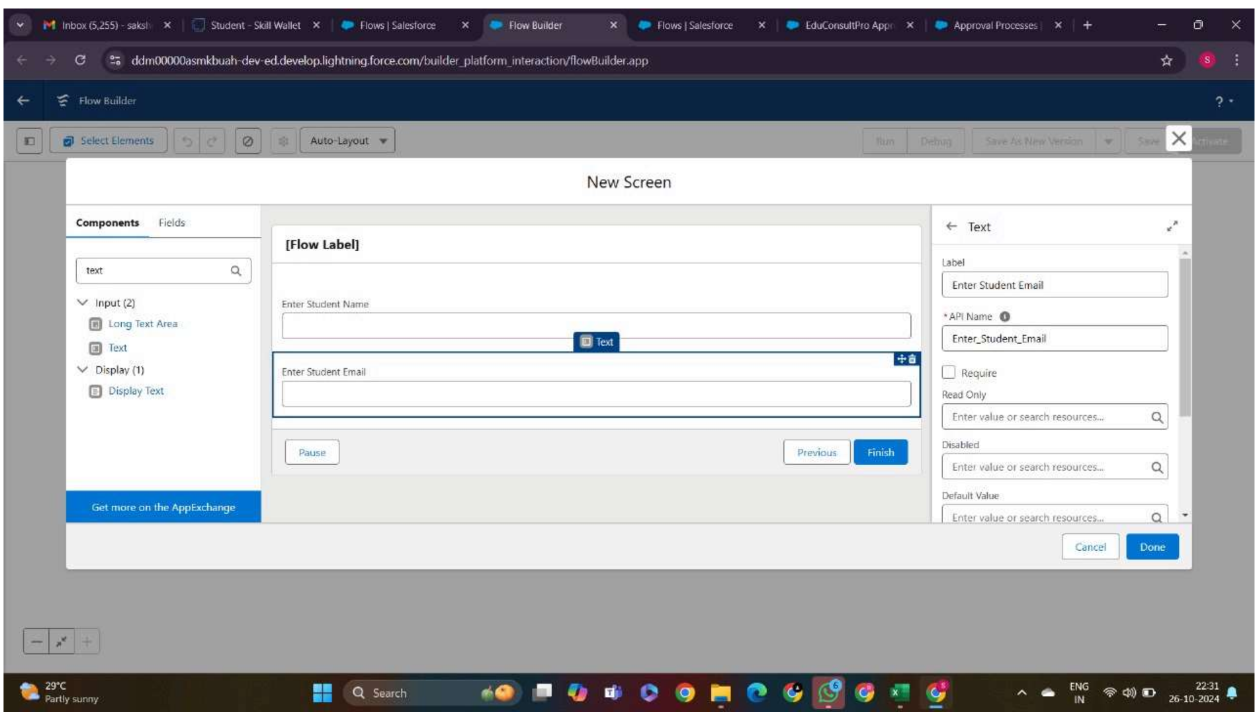
- **Configure the Action Element**:
  - **Action Type**: Select **Submit for Approval**.
  - **Set RecordId**: In the **Set Input Values** section, set **RecordId** to `{!$Record.Id}`, which will automatically use the ID of the Appointment record that triggered the flow.
- **Save and Activate the Flow**:
  - **Flow Label**: Name the flow **EduConsultPro Approval Flow**.
  - Click **Save** and then click **Activate**.



Create a ScreenFlow for Existing Student to Book an Appointment

Add Screen Element

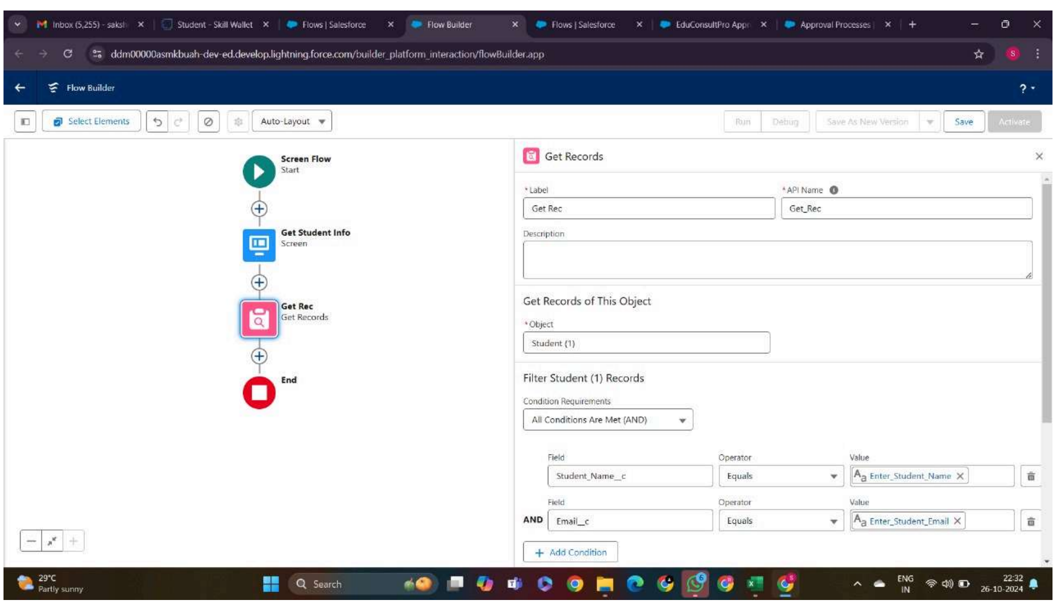
- **Open Flow Builder**:
    - In **Setup**, search for **Flow Builder** in the **Quick Find** box and select **Flow Builder**.
- **Create a New Flow**:
    - Click on **New Flow** and select **Screen Flow**.
    - Click **Create**.
- **Add a Screen Element**:
    - From the **Elements** panel on the left, drag **Screen** onto the flow canvas.
    - In the **Screen Properties** pane, set the **Label** as **Get Student Info**.
- **Add Text Components**:
    - In the **Screen** element, find **Text** under **Input** in the left side panel.
    - Drag the **Text** component onto the screen canvas and set:
        - **Label**: **Enter Student Name**
    - Drag another **Text** component onto the screen canvas and set:
        - **Label**: **Enter Student Email**



- **Finish Configuration**:
    - Click **Done** to complete this screen setup.

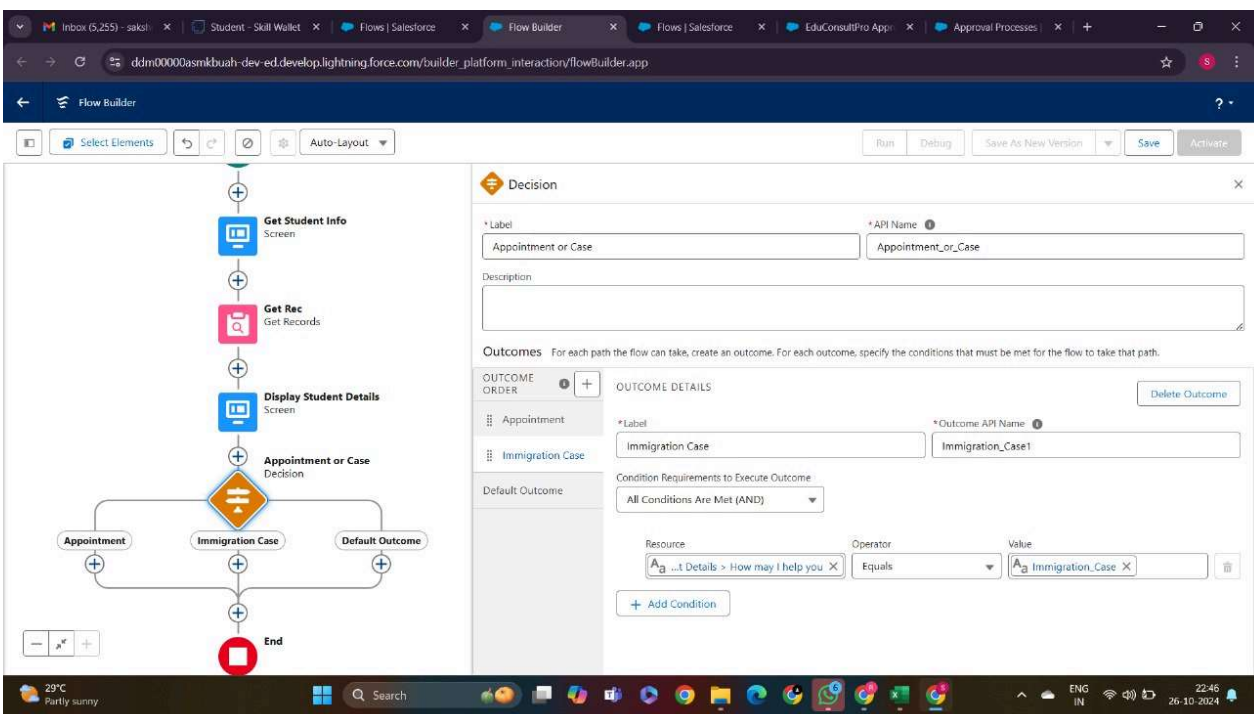
Add GET Record Element

- **Open the Flow Canvas**:
    - After configuring the **Decision Element** and paths, locate the **IELTS** path where you want to add the GET Record Element.
- **Add a GET Record Element**:
    - From the **Elements** panel on the left, drag **Get Records** onto the IELTS path in the flow canvas.
    - Label it as **Get Rec**.
- **Configure the GET Record Element**:
    - **Object**: Select **Student** as the object you want to retrieve.
    - **Condition Requirements**: Set **All Conditions are Met (AND)**.
- **Set Field Conditions**:
    - **Field**: Select **Student Name**.
        - **Operator**: Set to **Equals**.
        - **Value**: Select `{!Enter_Student_Name}` (this should match the text input variable created in the previous screen).
    - Add another field condition:
        - **Field**: **Email__c**
        - **Operator**: **Equals**
        - **Value**: `{!Enter_Student_Email}` (the variable from the previous screen).
- **Finish Configuration**:
    - Click **Done**.



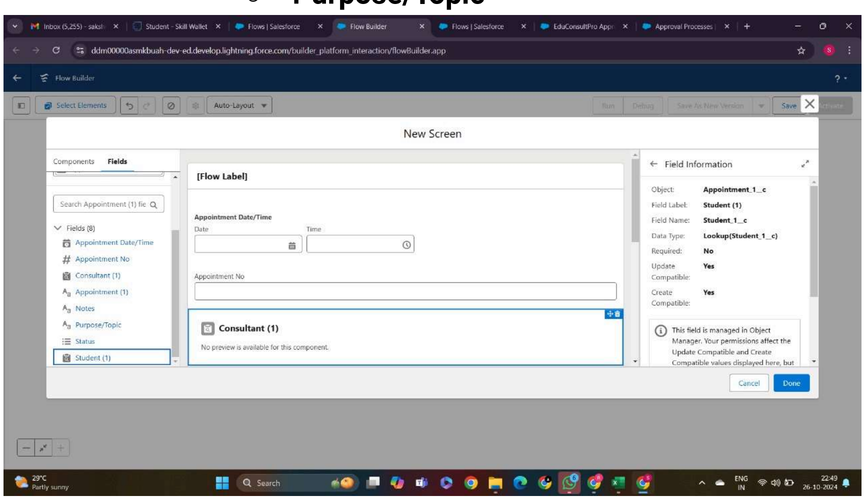
Add Decision Element

- **Open the Flow Canvas**:
  - After the **Select Display Student Details** element, add a new **Decision** element.
- **Add and Configure the Decision Element**:
  - Drag the **Decision** element onto the flow canvas.
  - **Label** it as **Appointment or Case**.
- **Configure Outcome for Appointment**:
  - **Outcome Label**: **Appointment**
  - **Condition**:
    - **Resource**: `{!How_may_I_Help_you}`
    - **Operator**: **Equals**
    - **Value**: `{!Book_an_Appointment}`
- **Add Outcome for Case**:
  - Click on the **"+" icon** to add a new outcome.
  - **Outcome Label**: **Case**
  - **Condition**:
    - **Resource**: `{!How_may_I_Help_you}`
    - **Operator**: **Equals**
    - **Value**: `{!Create_a_Case}` (or any variable name tied to selecting "Case").
- **Finish Configuration**:
  - Click **Done**.



Add Screen Element

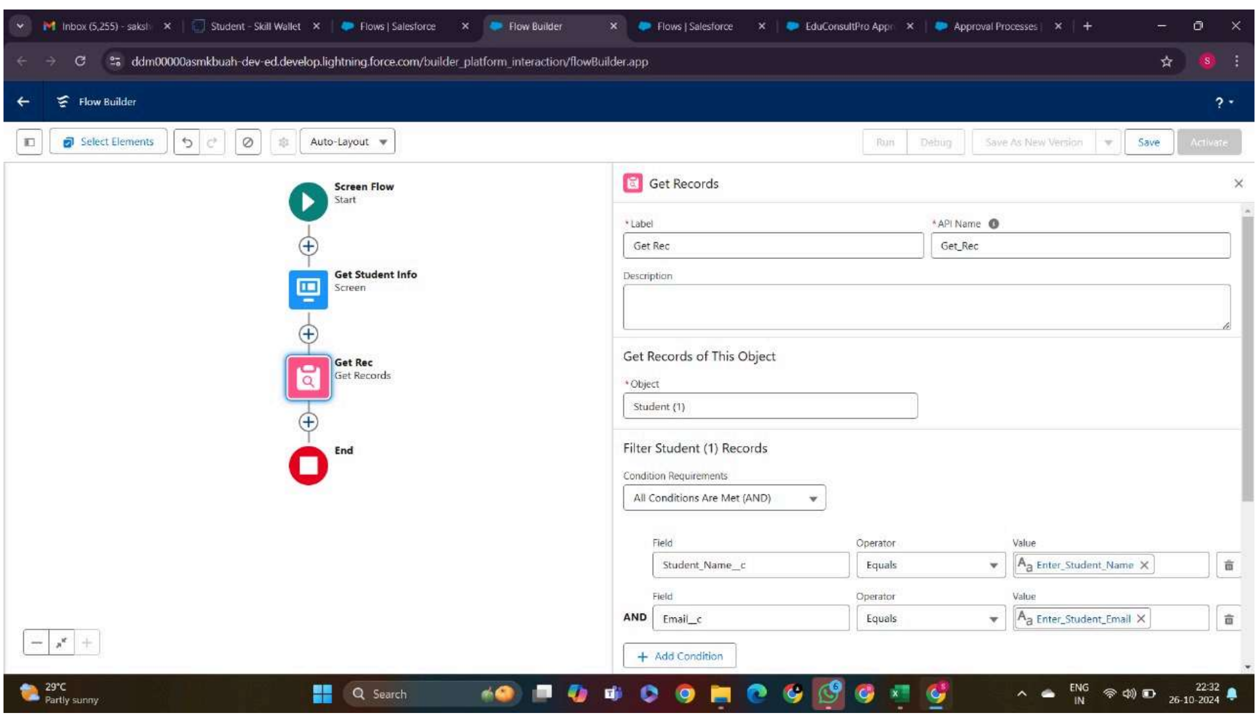
- **Open the Flow Canvas**:
  - Locate the **Appointment** path after the **Decision Element** and add a new **Screen** element.
- **Configure the Screen Element**:
  - Drag the **Screen** element onto the **Appointment** path.
  - **Label** it as **Appointment Booking Screen**.
- **Set Up Appointment Fields**:
  - In the **Screen Properties** pane, click on **Fields**.
  - Click the **Record Variable** input and select **New Resource** to create a new resource for storing appointment data.
    - **Resource Type**: **Variable**
    - **API Name**: `AppointmentRecordRes`
    - **Data Type**: **Record**
    - **Object**: **Appointment**
  - Click **Done** to save this new record variable.
- **Add Fields to the Screen**:
  - Use the **Fields** section to drag the necessary fields from `AppointmentRecordRes` onto the screen.
  - Arrange these fields to capture all the required details, such as:
    - **Student Name**
    - **Consultant Name**
    - **Date & Time**
    - **Purpose/Topic**



- **Complete the Configuration**:
  - After arranging the fields, click **Done** to save the **Screen Element**.

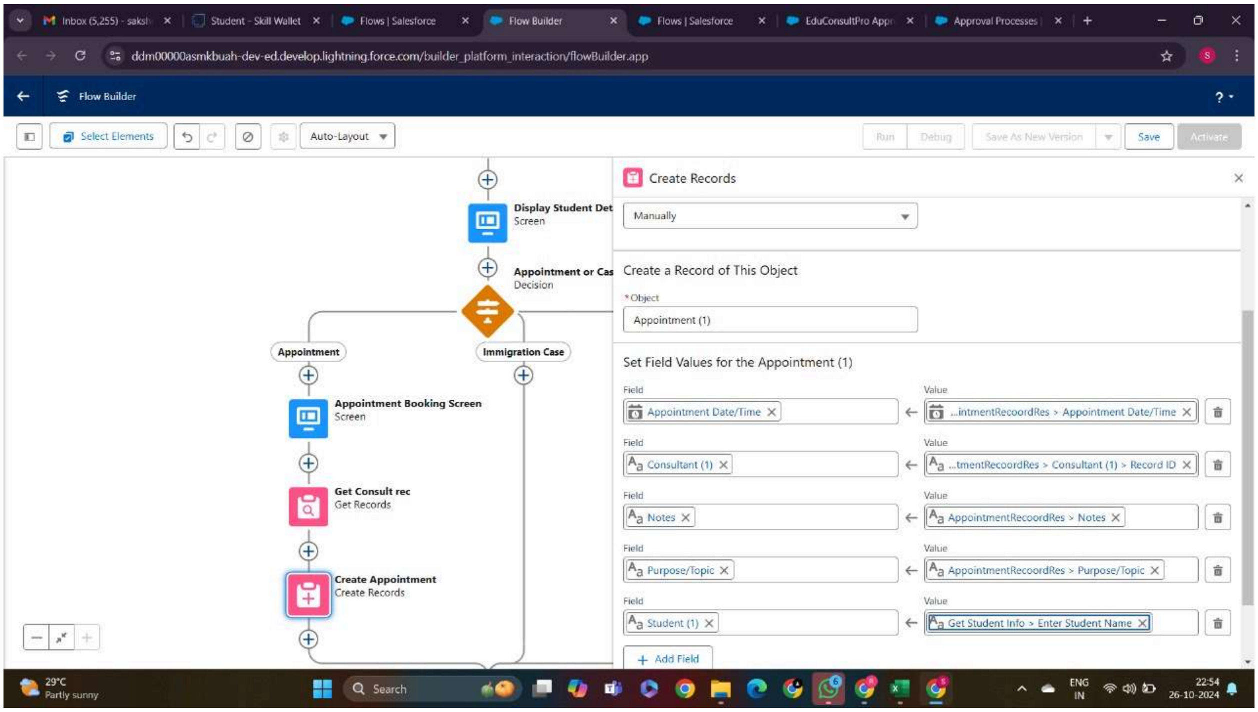
Add GET Record Element

- **Open the Flow Canvas**:
    - Under the **Appointment** path after the **Decision Element**, add a new **Get Records** element.
- **Configure the GET Record Element**:
    - Drag the **Get Records** element onto the **Appointment** path.
    - **Label** it as **Get Consultant Rec**.
- **Set Up Consultant Record Retrieval**:
    - **Object**: Select **Consultant**.
    - **Condition Requirements**: Set to **All Conditions Are Met (AND)**.
    - **Filter Conditions**:
        - **Field**: **Name**
        - **Operator**: **Equals**
        - **Value**: `{!AppointmentRecordRes.Consultant_Name__c}` (this pulls the consultant's name from the previously created `AppointmentRecordRes` resource).
- **Save the GET Record Element**:
    - Once all conditions are set, click **Done** to save the **Get Consultant Rec** element.



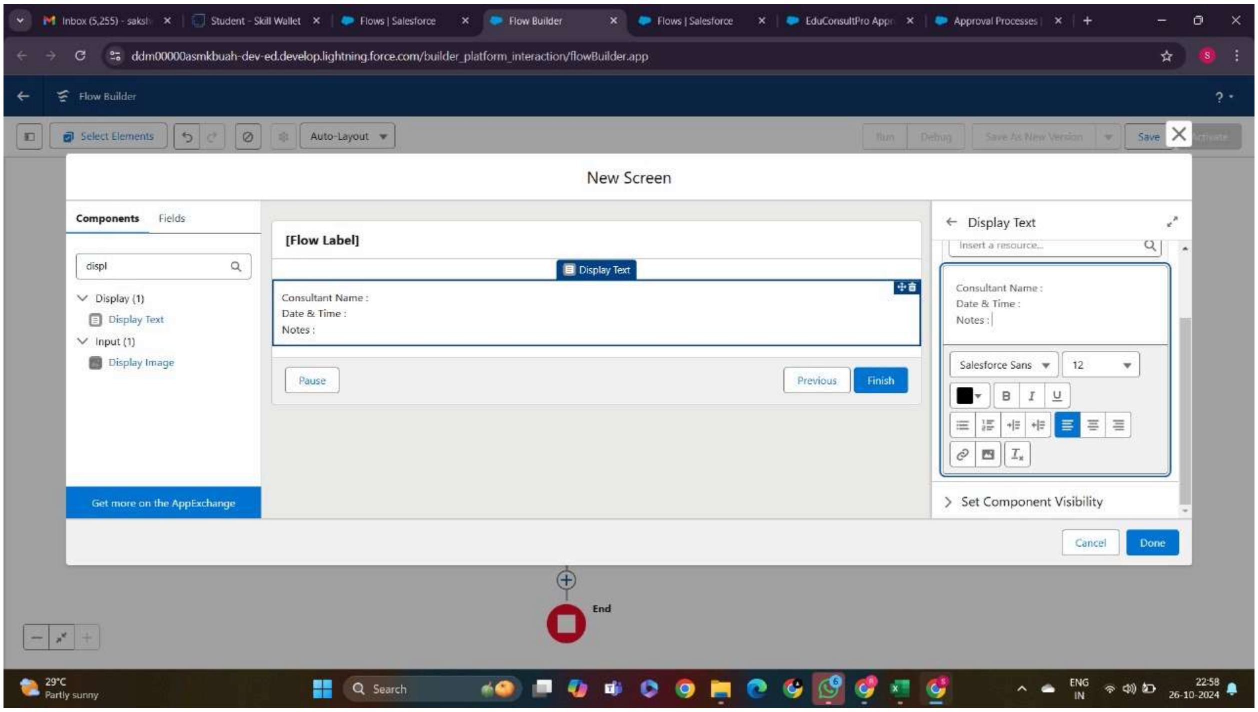
Create Appointment Record using Create Records Element

- **Open the Flow Canvas**:
  - After the **Get Consultant Rec** element, drag a **Create Records** element to the flow.
- **Configure the Create Records Element**:
  - **Label** it as **Create Appointment**.
- **Set the Record Creation Options**:
  - **How Many Records to Create**: Select **One**.
  - **How to Set the Record Fields**: Choose **Use separate resources, and literal values**.
- **Select Object**:
  - Choose **Appointment** as the object where the new record will be created.
- **Configure Field Values**:
  - Add the following fields and values:
    - **Field**: **Appointment_DateTime__c**
      - **Value**: `{!AppointmentRecordRes.Appointment_DateTime__c}`
    - **Field**: **Consultant__c**
      - **Value**: `{!Get_Consultant_Rec.Id}`
    - **Field**: **Notes__c**
      - **Value**: `{!AppointmentRecordRes.Notes__c}`
    - **Field**: **PurposeTopic__c**
      - **Value**: `{!AppointmentRecordRes.PurposeTopic__c}`
    - **Field**: **Student_Name__c**
      - **Value**: `{!Get_Rec.Id}` (from the **Get Record** element to retrieve the student's ID)
- **Save the Create Element**:
  - Once all fields are mapped, click **Done** to save the **Create Appointment** element.



Add Screen Element

- **Open the Flow Canvas**:
  - After the **Send Email to Student** action element, drag a **Screen** element onto the canvas.
- **Configure the Screen Element**:
  - **Label** the Screen as **Confirmation Screen**.
- **Add a Display Text Component**:
  - From the left side panel, find the **Display Text** component.
  - Drag the **Display Text** component into the main panel of the Confirmation Screen.
- **Set Up the Display Text**:
  - **Label** it as **Appointment_Confirmation**.



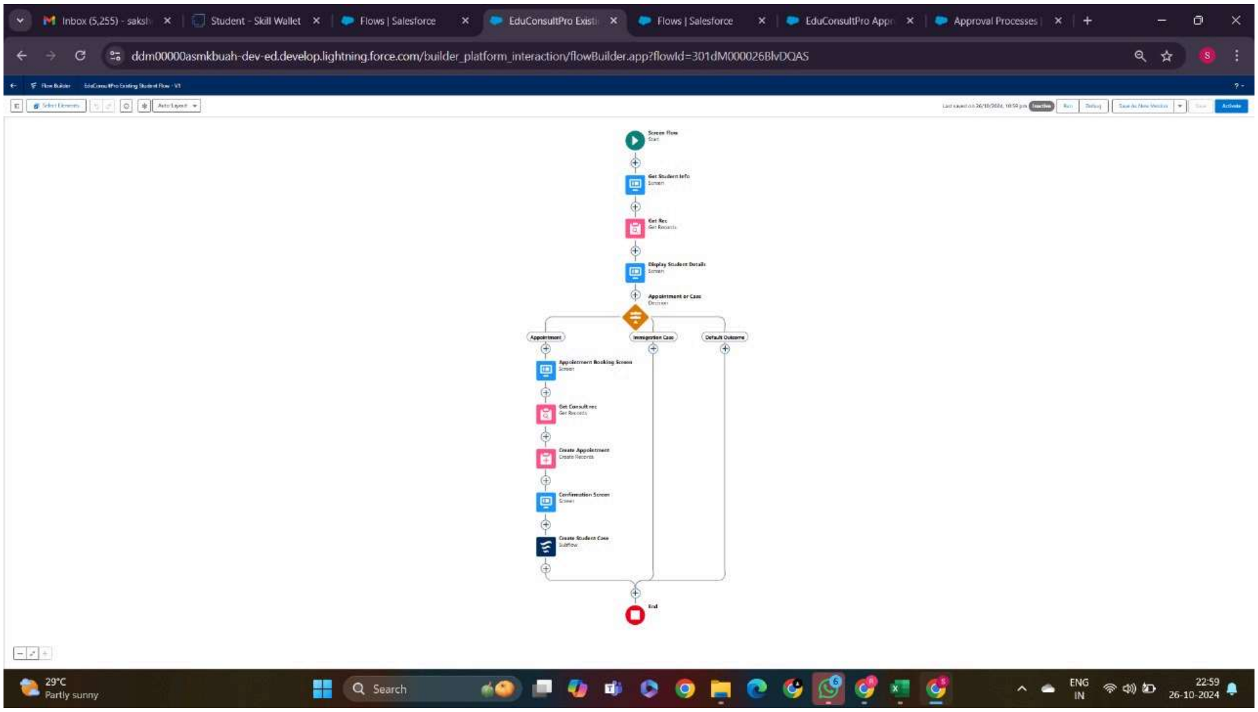
Finalize the Screen Element:

- Click **Done** to save the **Confirmation Screen** configuration.

Add an SubFlow Element

- **Open the Flow Canvas**:
    - Locate the **Decision Element** that handles the Case path.
- **Add a Subflow Element**:
    - From the left side panel, drag a **Subflow** element onto the canvas, placing it after the Decision Element in the Case path.
- **Configure the Subflow Element**:
    - In the **Subflow Element Configuration**:
        - **Search** for the subflow named **Create a Case**.
        - Select it from the results.
        - **Label** this element as **Create Student Case**.
- **Set Input Values** (if required):
    - Depending on the configuration of the subflow, you may need to set input values. Make sure to pass any necessary variables that the subflow requires.
- **Save the Flow**:
    - Click on the **Save** button in the upper right corner.
    - **Label** the flow as **EduConsultantPro Existing Student Flow**.

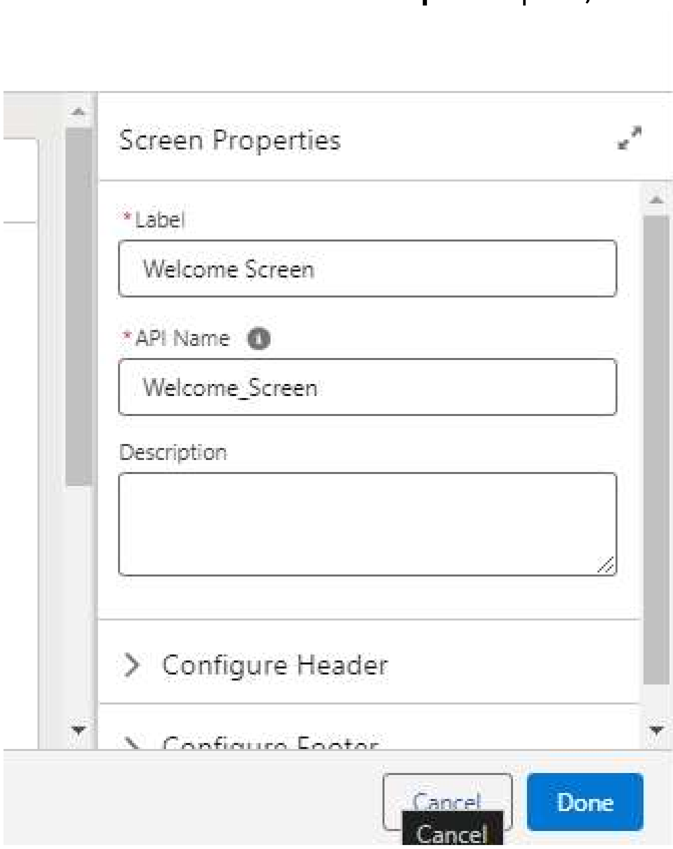
- **Activate the Flow**:
  - Once saved, don't forget to **activate** the flow to make it available for use.



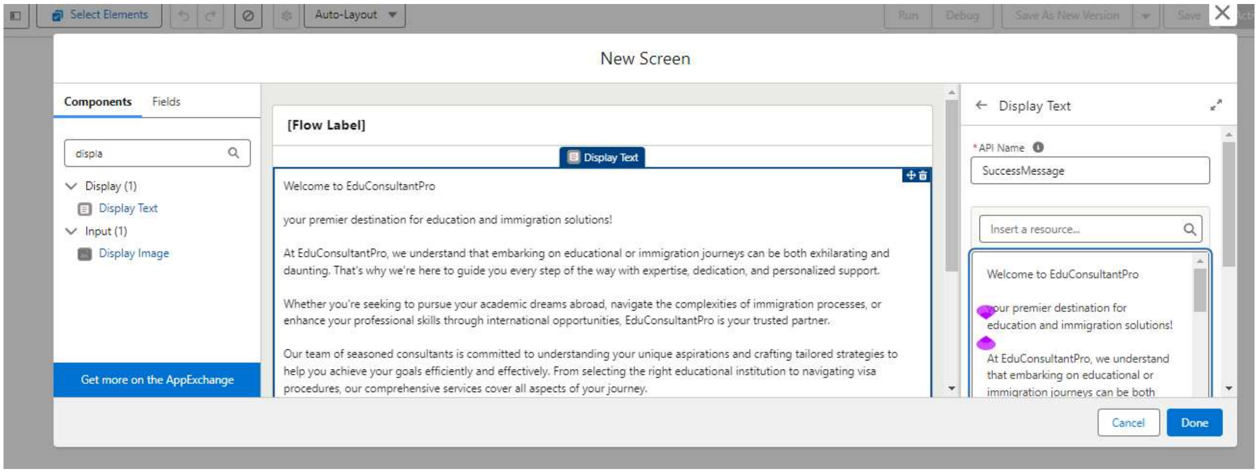
Create a ScreenFlow to Combine all the flows at one place

Add Screen Element

- **Open the Flow Builder**:
  - Go to your existing flow where you want to add the Welcome Screen.
- **Add a Screen Element**:
  - From the left side panel, drag the **Screen** element onto the canvas at the desired position in your flow.
- **Configure the Screen Element**:
  - In the **Screen Properties** pane, enter **Welcome Screen** as the label.



- **Add Display Text Component**:
  - From the left side panel, search for **Display Text** and drag it into the main panel of the Screen element.
  - Label this component as **SuccessMessage**.



- **Insert the Welcome Message**:
    - In the **Resource picker box**, paste the following text:

Welcome to EduConsultantPro

your premier destination for education and immigration solutions!

At EduConsultantPro, we understand that embarking on educational or immigration journeys can be both exhilarating and daunting. That's why we're here to guide you every step of the way with expertise, dedication, and personalized support.

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

Our team of seasoned consultants is committed to understanding your unique aspirations and crafting tailored strategies to help you achieve your goals efficiently and effectively. From selecting the right educational institution to navigating visa procedures, our comprehensive services cover all aspects of your journey.

At EduConsultantPro, we believe in fostering inclusive communities and unlocking the full potential of every individual. With our unwavering commitment to excellence and integrity, we strive to make your experience with us seamless and rewarding.

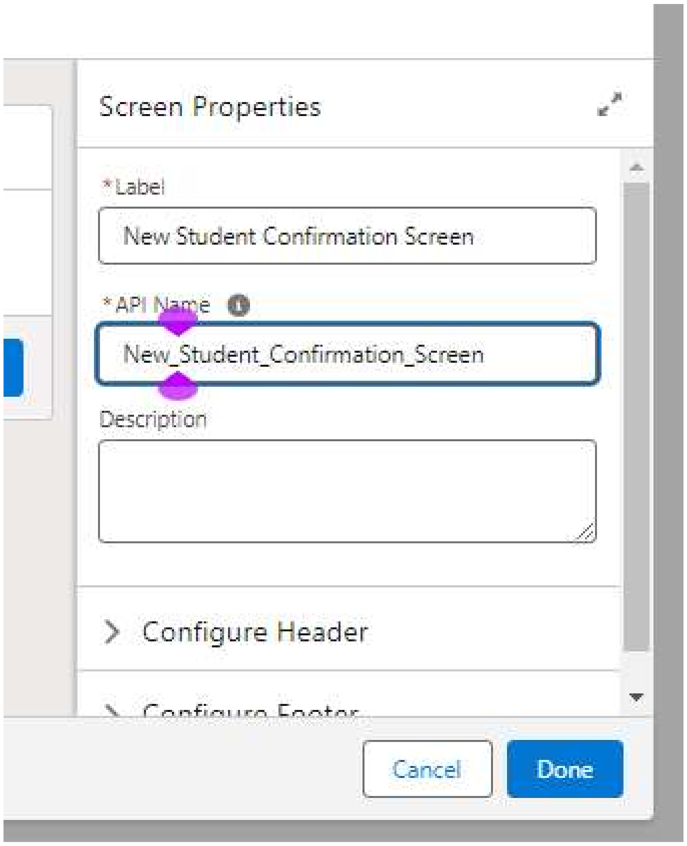
Welcome to EduConsultantPro – where your aspirations meet our expertise, and together, we pave the path to success. Let's embark on this transformative

```
journey together!
```

- **Finalize the Screen Element**:
  - After pasting the message, click on **Done** to save the configuration of the Screen element.
- **Connect the Screen Element**:
  - Make sure to connect this new Screen element to the appropriate parts of your flow so that users will see it at the right time.
- **Save Your Flow**:
  - Click on the **Save** button in the upper right corner to ensure your changes are recorded.

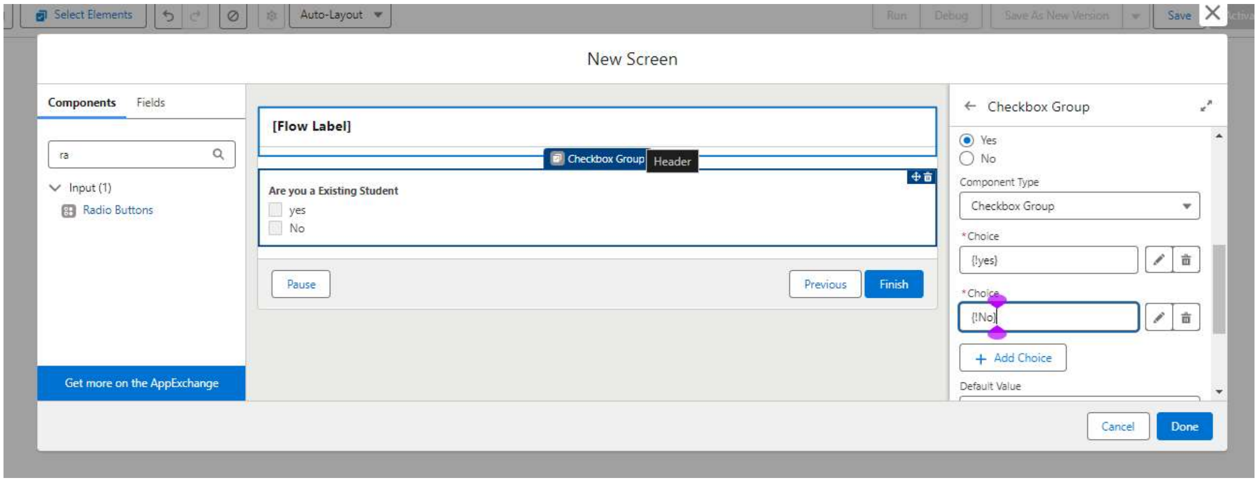
Add Screen Element

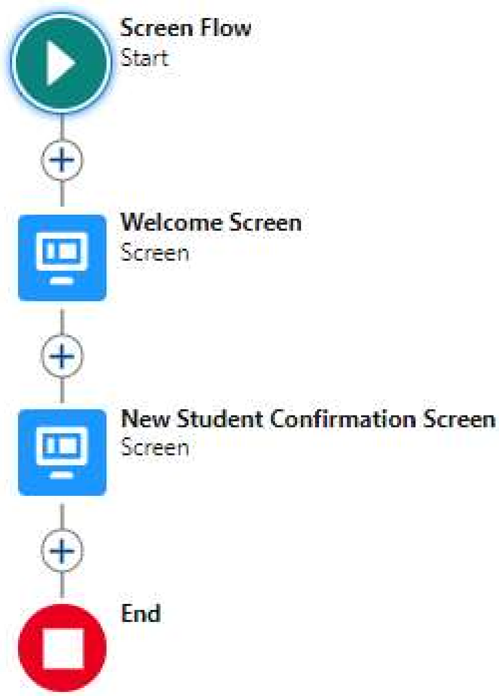
- **Open the Flow Builder**:
  - Access your flow where you want to add the new screen.
- **Add a Screen Element**:
  - Drag the **Screen** element onto the canvas, placing it after the **Welcome Screen Element**.
- **Configure the Screen Element**:
  - In the **Screen Properties** pane, set the **Label** to **Existing or New Student Confirmation Screen**.



- **Add Radio Button Component**:
  - From the left side panel, find and drag the **Radio Buttons** component onto the main panel of the Screen element.
- **Configure the Radio Button**:
  - Set the **Label** for the radio button component as **Are you an Existing Student?**
- **Add Choices**:
  - Click on **Add Choice**:
    - For the first choice:
      - Type **Yes** in the input field.
      - Click **Create** to save the **Yes** choice.
  - Repeat the process to create a second choice:
    - Click on **Add Choice** again.
    - Type **No** in the input field.
    - Click **Create** to save the **No** choice.
- **Finalize the Screen Element**:
  - Once both choices are added, click **Done** to save the configuration of the Screen element.
- **Connect the Screen Element**:
  - Ensure the new Screen element is connected appropriately in your flow, allowing users to proceed based on their selection.
- **Save Your Flow**:

- Click on the **Save** button to ensure all changes are recorded.

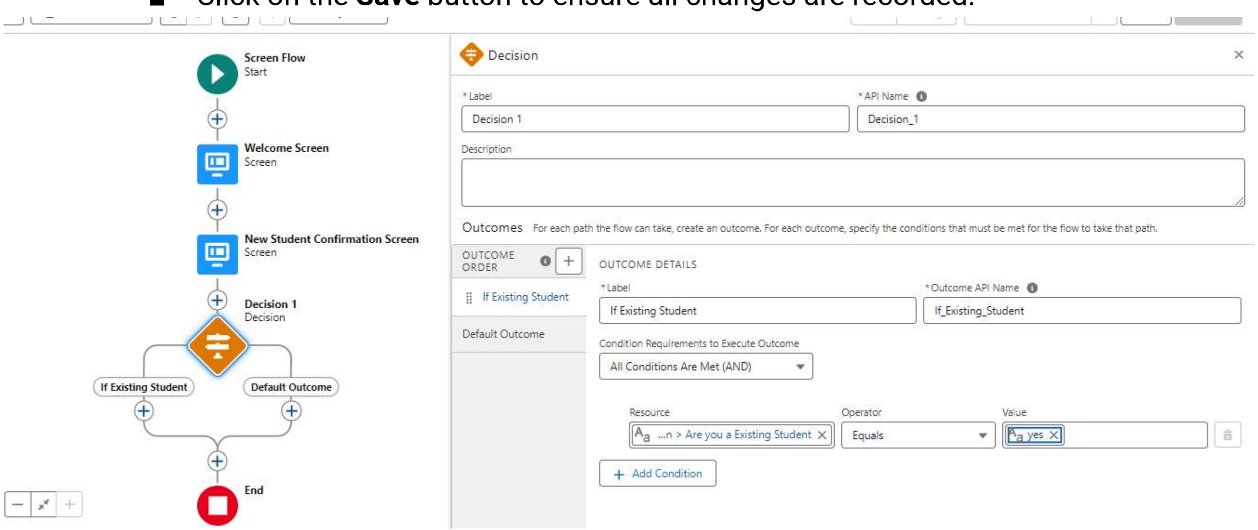




Add Decision Element

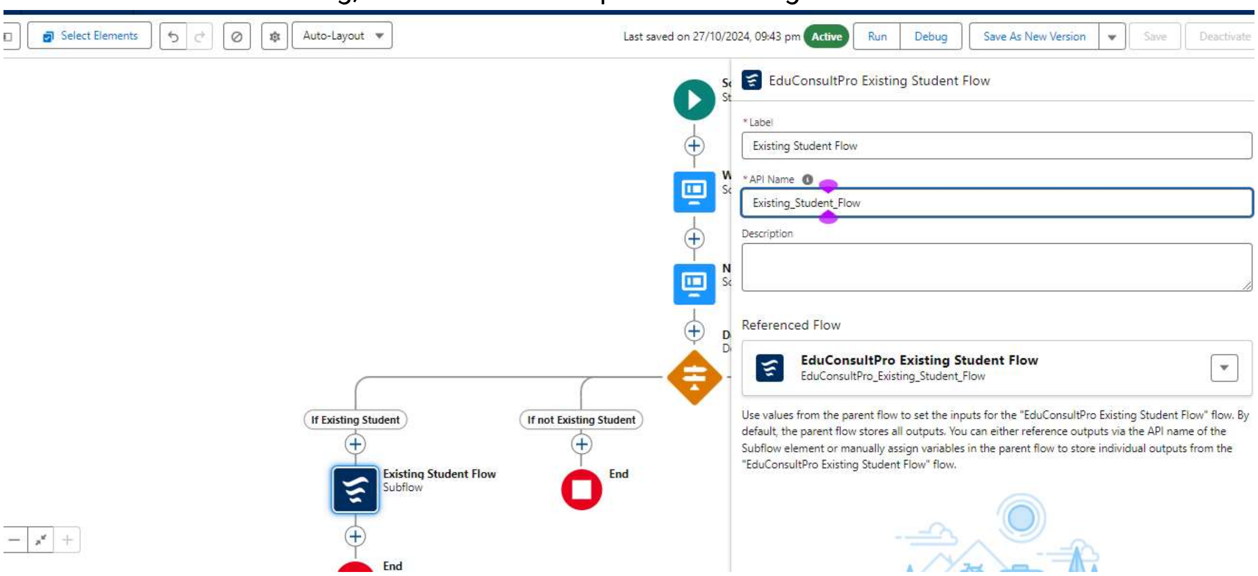
- **Add a Decision Element**:
    - Drag the **Decision** element onto the canvas after the **Existing or New Student Confirmation Screen Element**.
- **Configure the Decision Element**:
    - In the **Decision Properties** pane, set the **Label** to **Decision 1**.

- **Add Outcomes**:
  - Under the **Outcomes** section, you will see a default outcome labeled **Default Outcome**. Click on it to configure the first outcome.
  - **For the first outcome (If Existing Student)**:
    - Set the **Outcome Label** to **If Existing Student**.
    - In the **Resource** field, select **{!Are_you_a_Existing_Student}**.
    - Set the **Operator** to **Equals**.
    - In the **Value** field, enter **{!Yes}**.
- **Add Another Outcome**:
  - Click on the **+** icon to add a new outcome.
  - For the second outcome:
    - Set the **Outcome Label** to **If New Student**.
    - In the **Resource** field, select **{!Are_you_a_Existing_Student}**.
    - Set the **Operator** to **Equals**.
    - In the **Value** field, enter **{!No}**.
- **Finalize the Decision Element**:
  - Ensure that the conditions for both outcomes are correctly set.
  - Click **Done** to save the configuration of the Decision element.
- **Connect the Decision Element**:
  - Make sure to connect the **Decision Element** appropriately in your flow, so it directs the users to the respective paths based on their choice of being an existing or new student.
- **Save Your Flow**:
  - Click on the **Save** button to ensure all changes are recorded.



Add an SubFlow Element

- **Add a Subflow Element**:
    - Drag the **Subflow** element onto the canvas, placing it after the **Decision 1 Element** in the "If Existing Student" path.
- **Configure the Subflow Element**:
    - In the **Subflow Properties** pane, set the **Label** to **Existing Student Flow**.
    - Click on the **Subflow** dropdown and search for **EduConsultantPro Existing Student Flow**.
    - Select **EduConsultantPro Existing Student Flow** from the list.
- **Connect the Subflow**:
    - Ensure that the **Subflow Element** is connected correctly to the **Decision 1 Element**, specifically for the "If Existing Student" outcome path.
- **Save Your Flow**:
    - Click the **Save** button to ensure all changes are recorded.
    - In the **Save Flow** dialog, label your flow as **EduConsultantPro Existing Student Flow**.
- **Finalize**:
    - After saving, click **Done** to complete the configuration of the subflow element.

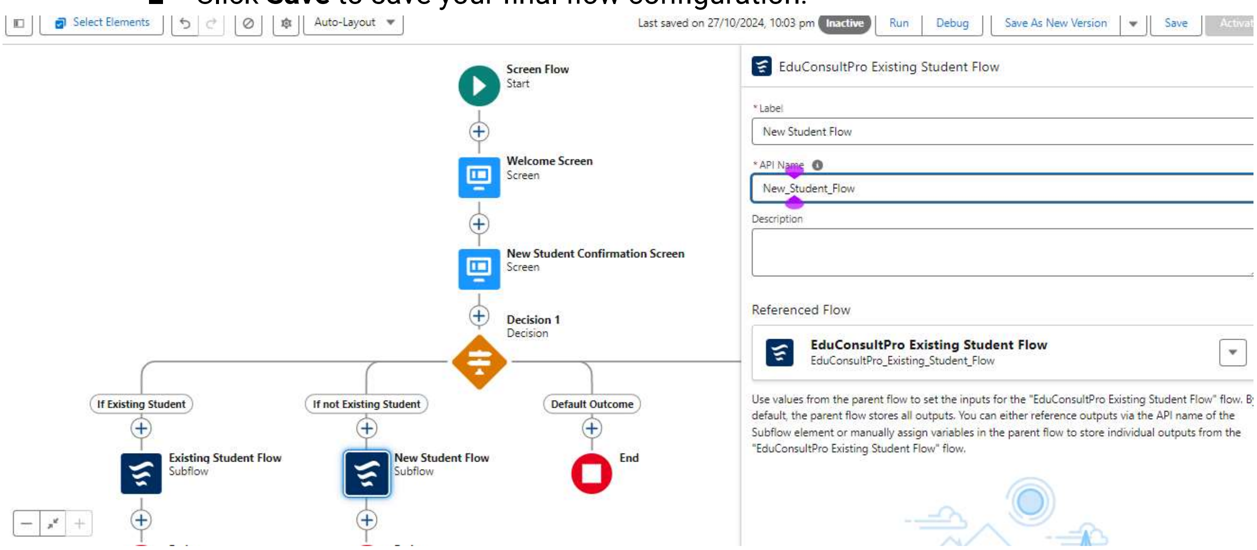


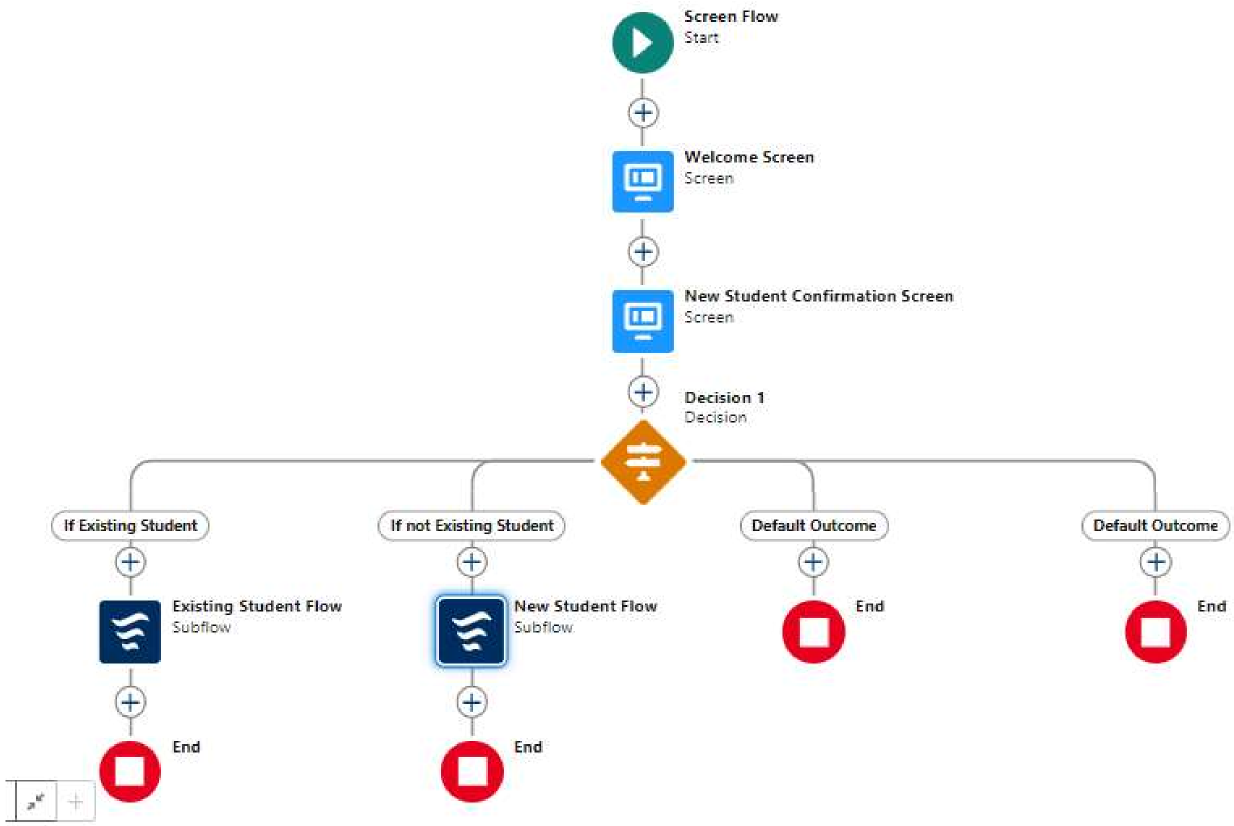
Add an SubFlow Element

- **Add a Subflow Element**:
    - Drag the **Subflow** element onto the canvas, placing it after the **Decision 1**

Element in the "If Not an Existing Student" path.

- **Configure the Subflow Element**:
  - In the **Subflow Properties** pane, set the **Label** to **New Student Flow**.
  - Click on the **Subflow** dropdown and search for **EduConsultantPro Student Flow**.
  - Select **EduConsultantPro Student Flow** from the list.
- **Connect the Subflow**:
  - Ensure that the **Subflow Element** is connected correctly to the **Decision 1 Element**, specifically for the "If Not an Existing Student" outcome path.
- **Save Your Flow**:
  - Click the **Save** button to ensure all changes are recorded.
  - In the **Save Flow** dialog, label your flow as **EduConsultantPro Existing Student Flow**.
- **Finalize the Flow**:
  - After saving, click **Done** to complete the configuration of the subflow element.
  - To finalize the overall flow, ensure it is saved one more time and label it as **EduConsultPro Flow**.
- **Save the Flow Again**:
  - Click **Save** to save your final flow configuration.

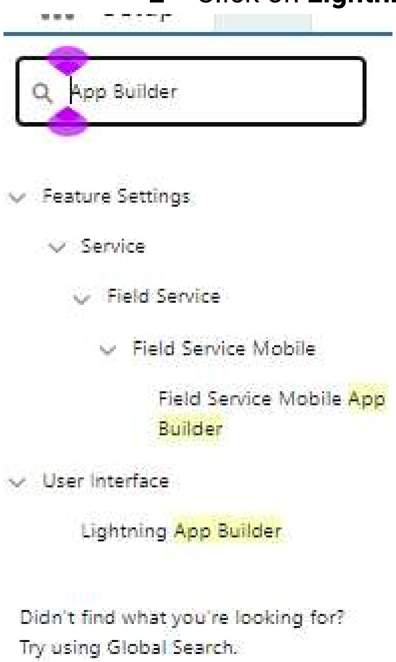



Screen Flow
Start
Welcome Screen
Screen
New Student Confirmation Screen
Screen
Decision 1
Decision
If Existing Student
If not Existing Student
Default Outcome
Default Outcome
Existing Student Flow
Subflow
New Student Flow
Subflow
End
End
End
End

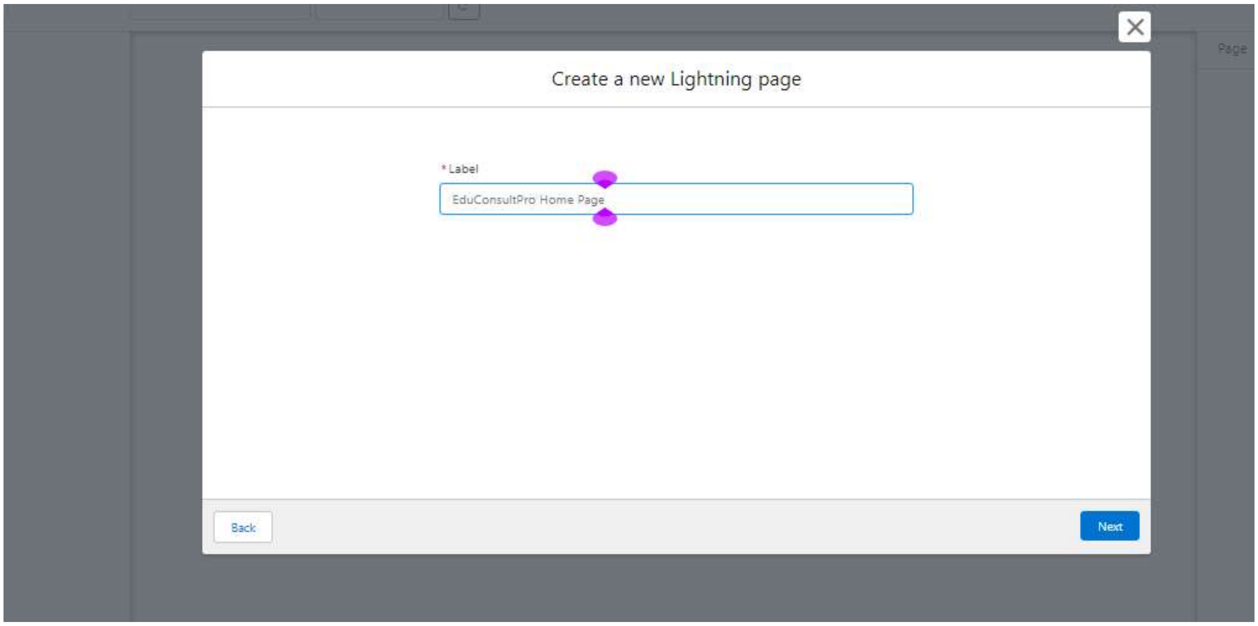
Create a lightning app page

Step 1: Create a Lightning App Page

1. **Go to Setup**:
   - Log in to your Salesforce org.
   - Click on the **gear icon** in the top right corner and select **Setup**.
2. **Access the App Builder**:
   - In the **Quick Find box**, type **App Builder**.
   - Click on **Lightning App Builder**.

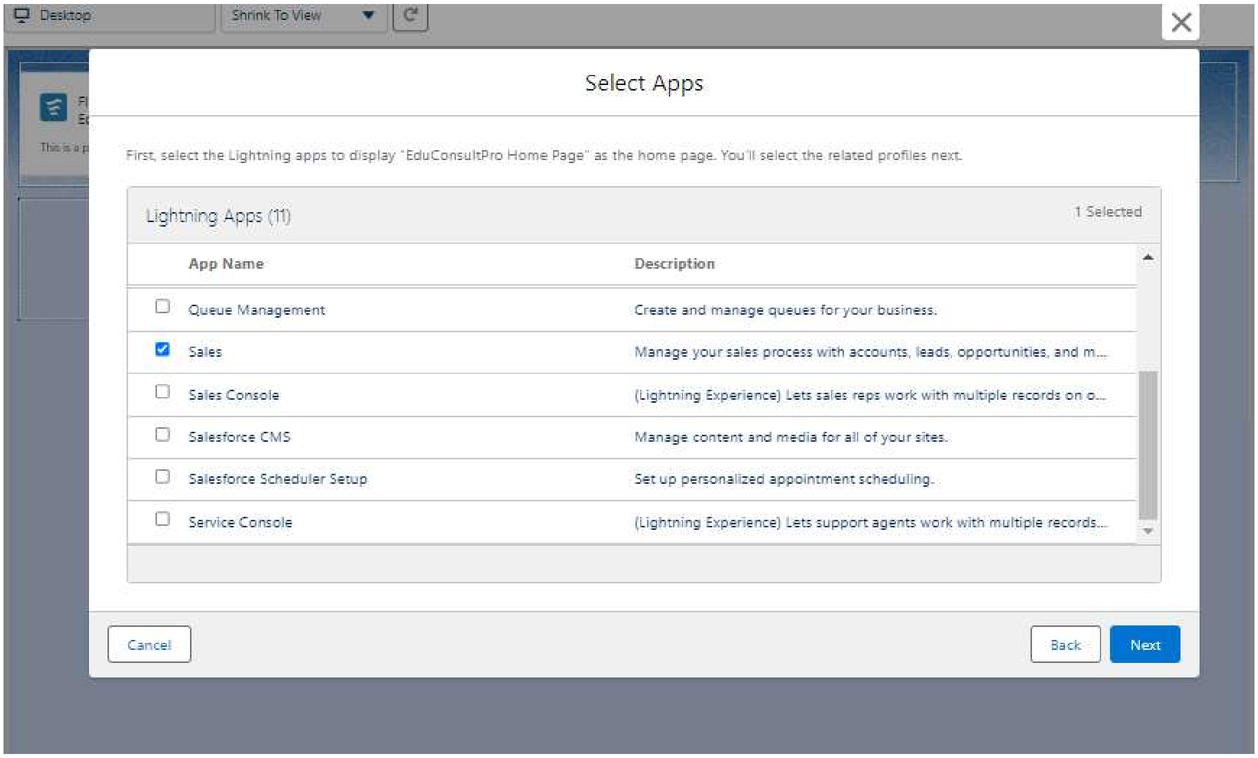


3. **Create a New Lightning App Page**:
   - Click the **New** button.
   - Select **App Page** and click **Next**.
4. **Configure the App Page**:
   - **Name** your page (e.g., "EduConsultPro Home").
   - Optionally, add a **description** for clarity.
   - Click **Next**.
5. **Select Page Layout**:
   - Choose a **layout** (e.g., one column, two columns, etc.) that suits your needs.
   - Click **Finish**.



Step 2: Add Components to the Page

1. **Drag and Drop Components**:
   - In the Lightning App Builder, you will see a list of available components on the left side.
   - Drag and drop the desired components (e.g., Reports, Dashboards, Record Lists, etc.) into the layout.
2. **Configure Components**:
   - Click on each component to configure its properties, such as selecting specific records or reports to display.
3. **Save and Activate**:
   - Once you've finished adding and configuring components, click the **Save** button.
   - After saving, click **Activate**.

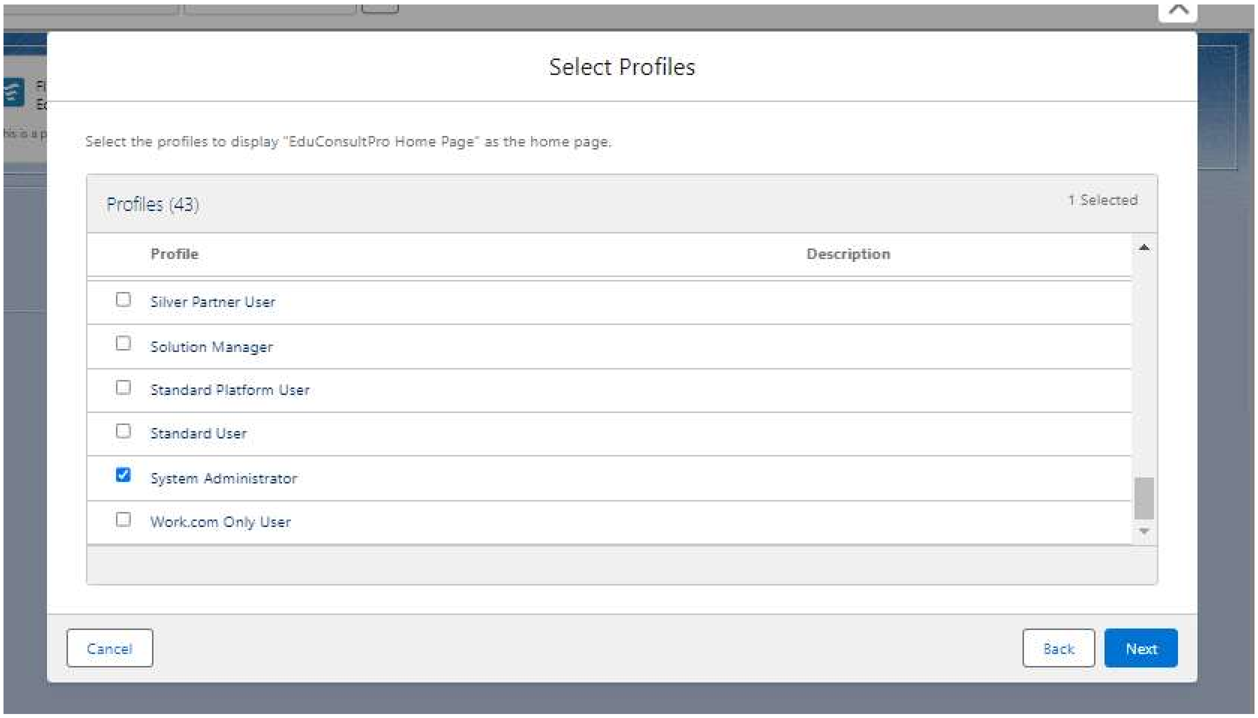


Step 3: Make the App Page Available in Your Application

1. **Select Availability**:
    - In the activation window, you will have options for making the page available:
        - **App Default**: Choose this if you want the page to be available in a specific app.
        - **App Page**: Select the app where you want this page to appear (e.g., EduConsultPro).
    - Choose your preferred visibility settings, such as who can see the page (e.g., all profiles or specific profiles).
2. **Click Finish**:
    - After setting the visibility options, click **Finish**.

Step 4: Access the App Page

1. **Go to the App**:
    - Switch to the app where you made the Lightning App Page available (e.g., EduConsultPro).
2. **Verify the Page**:
    - Locate the new page in your app's navigation bar or app menu to ensure it is accessible and functioning as intended.


Select Profiles
Select the profiles to display "EduConsultPro Home Page" as the home page.
Profiles (43)
1 Selected
Profile
Description
Silver Partner User
Solution Manager
Standard Platform User
Standard User
System Administrator
Work.com Only User
Cancel
Back
Next

THANK YOU