



A CRM Application to Manage the Services offered by an Institution

COLLEGE:-

KALLAM HARANADHAREDDY INSTITUTE OF TECHNOLOGY

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PROJECT OVERVIEW

Edu Consult Pro Institute is a leading 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 expert consulting services efficiently. To address these challenges, Edu Consult Pro Institute 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 offered by Edu Consult Pro Institute. 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.

OBJECTIVES

- 1. Centralized CRM for Service Management:** Develop a Salesforce CRM application to manage Edu Consult Pro's core services, including student admissions, course management, and consulting services.
- 2. Structured Data and Relationships:** Create custom objects and establish relationships among them to represent the institute's data structure, such as courses, students, and admissions.
- 3. Automated Admission Process:** Implement a screen flow to automate the student admission application process, guiding prospective students through each step efficiently.
- 4. Appointment Booking for Existing Students:** Design a screen flow for existing students to book consulting appointments, enhancing support services through streamlined scheduling.
- 5. Email Automation and Notifications:** Set up email templates and automated actions to notify students about their admission status and appointments, improving communication.
- 6. Approval Workflow Configuration:** Create an approval process to facilitate administrative reviews and approvals for critical records, ensuring efficient decision-making.
- 7. Comprehensive Flow Integration:** Combine all individual flows into a single unified flow, providing admissions staff with an accessible, one-stop interface for managing applications, inquiries, and appointments.

8. **Enhanced User Interface with Lightning Apps:** Develop Lightning apps and pages to present a user-friendly interface for admissions staff, enhancing usability and productivity.

SALESFORCE KEY FEATURES AND CONCEPTS UTILIZED

Custom Objects and Data Modeling

1. **Objects Creation:** Custom objects were created to represent key entities like Courses, Students, and Admissions, directly from a spreadsheet for ease of setup.
2. **Relationship Building:** Relationships were established among objects (such as lookups and master-detail relationships) to reflect the data structure of Edu Consult Pro and allow for interconnected data across records.

Standard Objects Configuration

1. **Case Object:** Configured the Case object to manage student inquiries, allowing support staff to log, track, and resolve inquiries efficiently.
2. **User Object and Permissions:** Configured user roles, profiles, and permissions to control access and ensure that admissions staff can view and update only relevant data.

Process Automation with Flows

1. **Screen Flow for Admission Process:** Designed a step-by-step screen flow to guide prospective students through the admission application process, including data collection, decision points, and record creation.
2. **Flow for Appointment Booking:** Developed a screen flow for existing students to book appointments for consulting services, automating the scheduling process.
3. **Record-Triggered Flow:** Configured a record-triggered flow to automate actions (like sending notifications) based on specific changes in record status, enhancing responsiveness.
4. **Sub Flows and Combined Flow:** Integrated multiple flows into a single, comprehensive flow to streamline admissions management in one place.

Approval Processes

1. Created a multi-step approval process for critical records, such as admissions or consulting requests, ensuring administrative reviews and approval tracking for important decisions.

Email Templates and Notification Automation

2. **Custom Email Templates:** Designed email templates for admission status updates and appointment confirmations.
3. **Automated Notifications:** Configured automated emails and in-app notifications, keeping students informed about their application status and appointments.

Lightning App and App Pages

1. **Lightning App Creation:** Developed a dedicated Lightning app for admissions, providing staff with quick access to essential functions.
2. **Custom Lightning App Pages:** Created visually engaging and user-friendly Lightning pages for streamlined navigation and efficient data management.

Dynamic User Interface Elements

1. **Screen Elements in Flows:** Incorporated screen elements for data entry, selection, and confirmation in flows, creating an interactive user experience.
2. **Decision and Action Elements:** Utilized decision elements to guide flow paths based on conditions, and action elements to automate updates and notifications.

DETAILED STEPS TO CREATE SOLUTIONS DESIGN

Create Objects from Spreadsheet

1. Go to Object Manager and select Create Object from Spreadsheet to create the Course object.
2. Download the Course spreadsheet, upload it, map the fields, and create the object.
3. Follow the same steps to create the remaining objects: Consultant, Student, and Appointment.
4. Establish lookup relationships between Appointment and Student, and Appointment and Consultant.
5. Create a Registration object to store details about student course enrollments, linking Student and Course records.
6. Configure a lookup relationship between Student and Case to manage student queries related to immigration and visa applications.
7. Customize the Case object by adding values to the Type field (Immigration, Visa Application) and the Status field (Open, In-progress).

8. Create a new Lightning App called Edu Consult Pro, adding essential tabs like Home, Students, Courses, Consultants, Appointments, Registrations, and Cases.
9. Assign the System Administrator profile to the app to ensure proper access and functionality.

10. Create Course Object:

Create a custom object from a spreadsheet

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 Course - Course	
Fields Detected 5	Fields Created 5
Rows Detected 5	Rows Imported 5

[Import Another Object](#)

1. Go to your object manager and click on create object from spreadsheet
2. Click on the link to get the spreadsheet, [Course](#).
3. After downloading, upload the file, map the fields and upload to create an object

Create Remaining Objects:

a. Consultant

Create a custom object from a spreadsheet

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 - Consultant

Fields Detected	Fields Created
6	6

Rows Detected
3

Rows Imported
3

[Import Another Object](#)

b. Student

Create a custom object from a spreadsheet



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

Object Created
Student - Student

We couldn't import all of your row data. Try again using the Data Import Wizard in Setup.

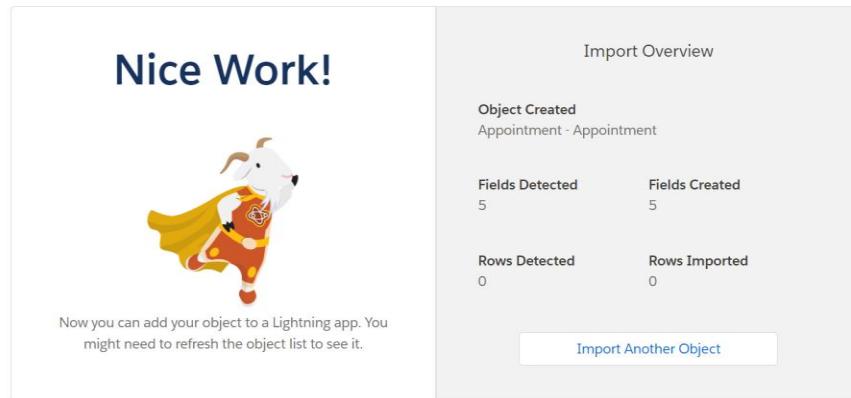
Fields Detected	Fields Created
12	12

Rows Detected	Rows Imported
2	1

[Import Another Object](#)

c. Appointment

Create a custom object from a spreadsheet



Create Relationships Among The Objects:

- 1. Identify Relationship Type** – Choose Lookup, Master-Detail, or Many-to-Many based on business needs.
- 2. Create Relationship Field** – In Object Manager, go to Fields & Relationships, create a new field, and select the relationship type.
- 3. Configure & Save** – Select the related object, set field settings, define security, and add it to page layouts.
- 4. Test & Validate** – Add sample records and verify the relationship works as expected.

The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. The left sidebar includes links for Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area displays various data types for selection:

- None Selected**: Select one of the data types below.
- Auto Number**: A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula**: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary**: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship** (selected): Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship**: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- External Lookup Relationship**: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Boolean**: Allows users to select a True (checked) or False (unchecked) value.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and various global icons. The main menu bar has 'Setup' selected, followed by 'Home' and 'Object Manager'. On the left, a sidebar titled 'Quick Find' lists various setup categories like 'Setup Home', 'Service Setup Assistant', etc. The main content area is titled 'Tabs' under 'SETUP'. It contains a section titled 'Custom Tabs' with a brief description of what custom tabs are and how they can be used. Below this is a table titled 'Custom Object Tabs' with the following data:

Action	Label	Tab Style	Description
Edit Del	Appointment - Appointment	Box	
Edit Del	Consultant - Consultant	Box	
Edit Del	Course - Course	Box	
Edit Del	Registrations	Box	
Edit Del	Student - Student	Box	

Configure The Case Object:

- 1. Enable Case Features** – Go to Setup → Case Settings and enable features like Email-to-Case, Web-to-Case, and Case Assignment Rules.
- 2. Customize Fields & Layouts** – In Object Manager → Case, add custom fields, update page layouts, and configure record types.
- 3. Automation & Security** – Set up workflows, escalation rules, and permissions for agents to manage cases efficiently

SETUP > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Validation Rules

No validation rules defined.

Case Type Picklist Values

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Mechanical	Mechanical	<input type="checkbox"/>	Assigned dynamically	Sale Vamsi krishna, 02/03/2025, 2:30 am
Edit Del Deactivate	Electrical	Electrical	<input type="checkbox"/>	Assigned dynamically	Sale Vamsi krishna, 02/03/2025, 2:30 am
Edit Del Deactivate	Electronic	Electronic	<input type="checkbox"/>	Assigned dynamically	Sale Vamsi krishna, 02/03/2025, 2:30 am
Edit Del Deactivate	Structural	Structural	<input type="checkbox"/>	Assigned dynamically	Sale Vamsi krishna, 02/03/2025, 2:30 am
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	Assigned dynamically	Sale Vamsi krishna, 02/03/2025, 2:30 am

Inactive Values

No Inactive Values values defined.

SETUP > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Validation Rules

No validation rules defined.

Case Type Picklist Values

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Mechanical	Mechanical	<input type="checkbox"/>	Assigned dynamically	Sale Vamsi krishna, 02/03/2025, 2:30 am
Edit Del Deactivate	Electrical	Electrical	<input type="checkbox"/>	Assigned dynamically	Sale Vamsi krishna, 02/03/2025, 2:30 am
Edit Del Deactivate	Electronic	Electronic	<input type="checkbox"/>	Assigned dynamically	Sale Vamsi krishna, 02/03/2025, 2:30 am
Edit Del Deactivate	Structural	Structural	<input type="checkbox"/>	Assigned dynamically	Sale Vamsi krishna, 02/03/2025, 2:30 am
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	Assigned dynamically	Sale Vamsi krishna, 02/03/2025, 2:30 am

Inactive Values

No Inactive Values values defined.

Create A Lightning App

- Go to App Manager** – In Setup → App Manager, click New Lightning App and choose the app type.
- Configure App Settings** – Set the app name, branding, navigation style (standard or console), and supported form factors.
- Add Navigation Items & Assign Users** – Select objects, tabs, and utilities, then assign profiles or permission sets before saving and activating the app.

New Lightning App

Available Items Selected Items

	Available Items	Selected Items
Accounts		Home
All Sites		Student - Student
Alternative Payment Methods		Course - Course
Analytics		Consultant - Consultant
App Launcher		Appointment - Appointment
Appointment Categories		Registrations
		Cases

Back Next

8 Content Content Salesforce CRM Content 15/10/2024, 9:50 am Classic 15/10/2024, 9:50 am Lightning

9 Data Manager DataManager Use Data Manager to view limits, monitor usage, and... 15/10/2024, 9:50 am Lightning

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles Selected Profiles

	Available Profiles	Selected Profiles
	Analytics Cloud Integration User	System Administrator
	Analytics Cloud Security User	
	Authenticated Website	
	Authenticated Website	

Back Save & Finish

8 Content Content Salesforce CRM Content 15/10/2024, 9:50 am Classic 15/10/2024, 9:50 am Lightning

9 Data Manager DataManager Use Data Manager to view limits, monitor usage, and... 15/10/2024, 9:50 am Lightning

Setup Home Object Manager

Search app

Salesforce Mobile App

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

SETUP New Lightning App New Connected App

Lightning Experience App Manager

31 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

App Name	Developer Name	Description	Last Modified	App Type	Vi...
Analytics Studio	Insights	Build CRM Analytics dashboar...	02/03/2025, 2:30 am	Classic	✓
Ant Migration To...	Forcecom_Migration_Tool	The Force.com Migration Tool ...	02/03/2025, 2:30 am	Connected (Managed)	✓
App Launcher	AppLauncher	App Launcher tabs	02/03/2025, 2:30 am	Classic	✓
Approvals	Approvals	Manage approvals and approv...	02/03/2025, 2:34 am	Lightning	✓
Automation	FlowsApp	Automate business processes ...	02/03/2025, 2:39 am	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business...	02/03/2025, 2:30 am	Lightning	✓
Community	Community	Salesforce CRM Communities	02/03/2025, 2:30 am	Classic	✓
Content	Content	Salesforce CRM Content	02/03/2025, 2:30 am	Classic	✓

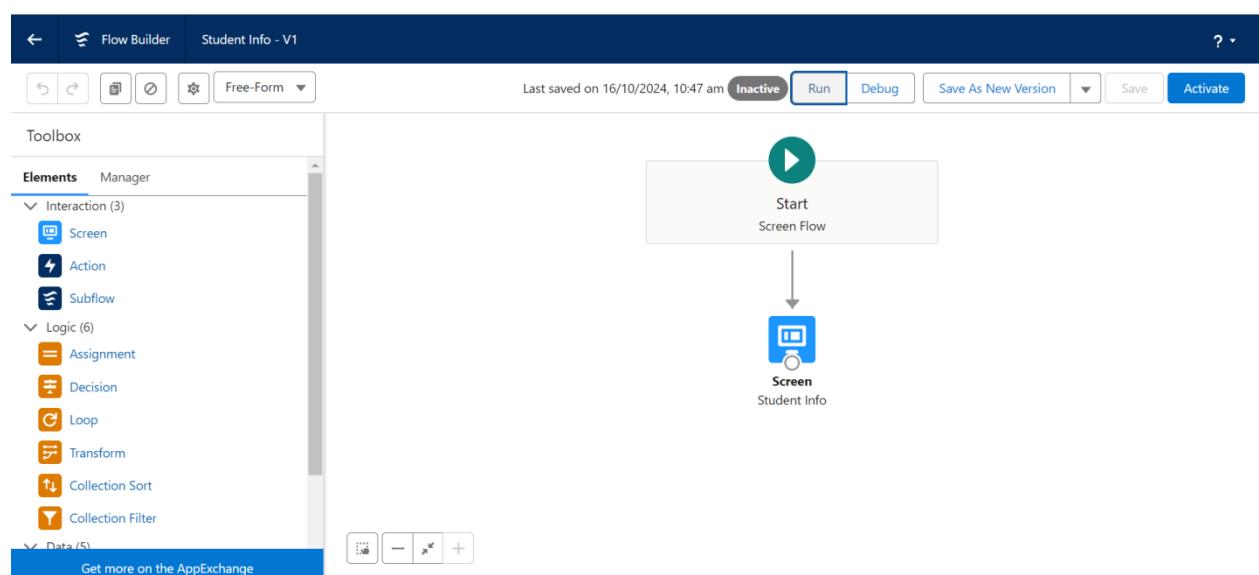
<https://playful-unicorn-rhechb-dev-ed.trailblaze.lightning.force.com/lightning/setup/NavigationMenus/home>

Create a Screen Flow for Student Admission Application process

1. Create a Screen Flow for the student admission application process.
2. Add a Screen Element to collect information from the student.
3. Use the Create Records element to create a new Student record.
4. Add another Screen Element to display confirmation or further instructions to the student.
5. Add a Decision Element to check conditions such as eligibility or form completeness.
6. Add a Get Records element to retrieve existing data, if necessary.
7. Use the Create Records element again to create a Registration record linking the student to the selected course.
8. Create Email Text Template Variables for the body and subject of the admission confirmation email.
9. Add an Action Element to send the email to the student.
10. Add another Screen Element to display a final confirmation or thank you message to the student.

Add Screen Element

1. Add a Screen Element to collect information from the student.



Student Info

Student Name

First Name

Last Name

Phone

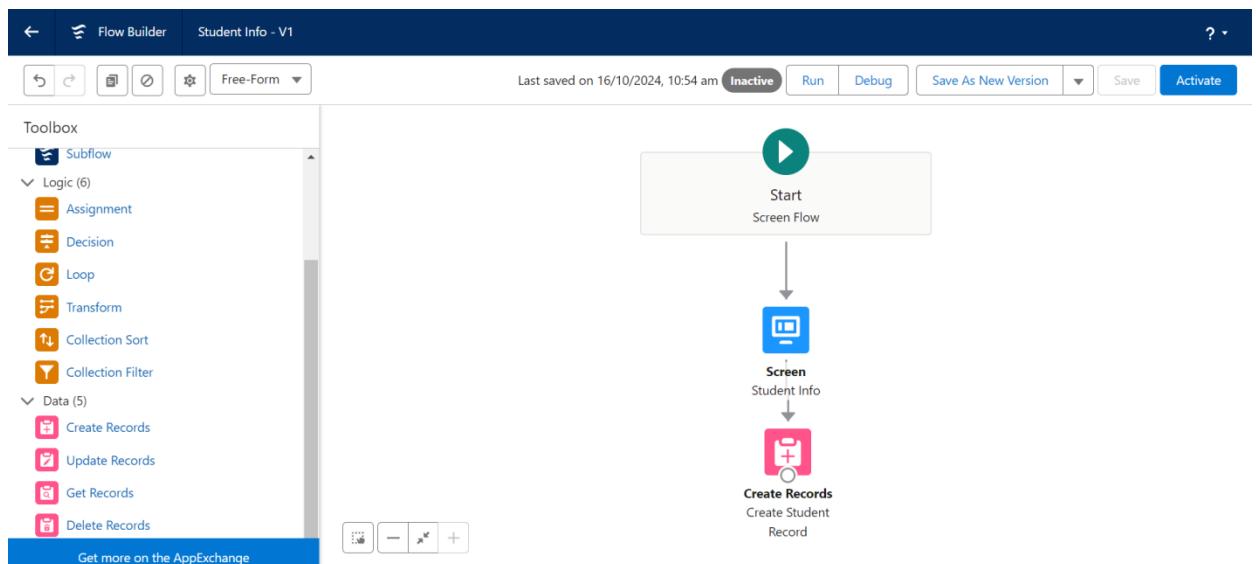
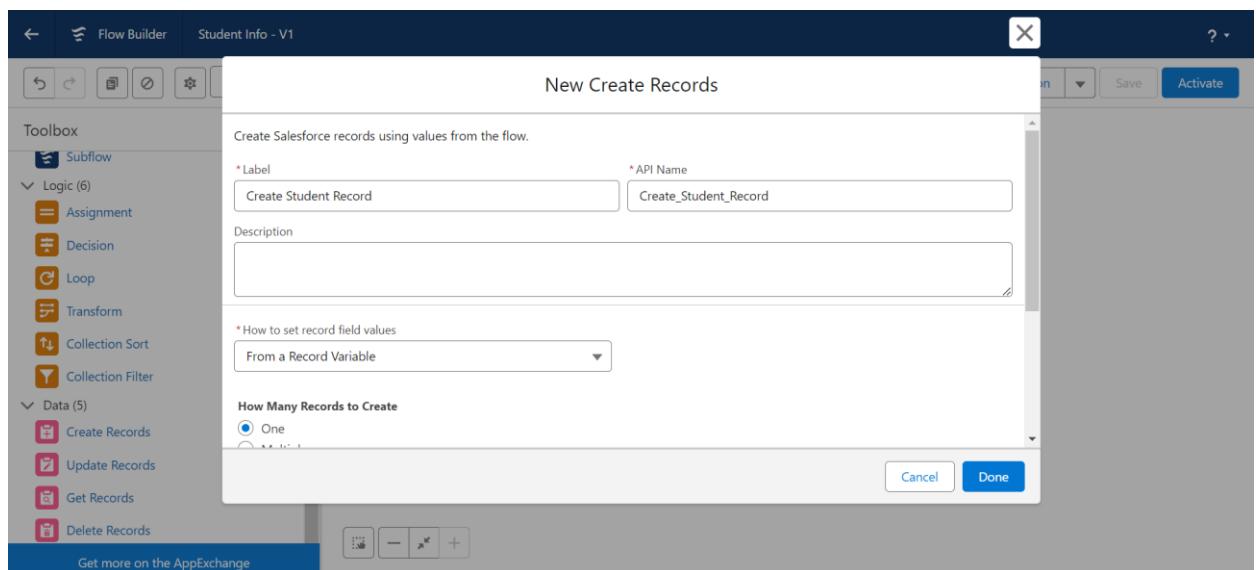
Email

Date of Birth
 

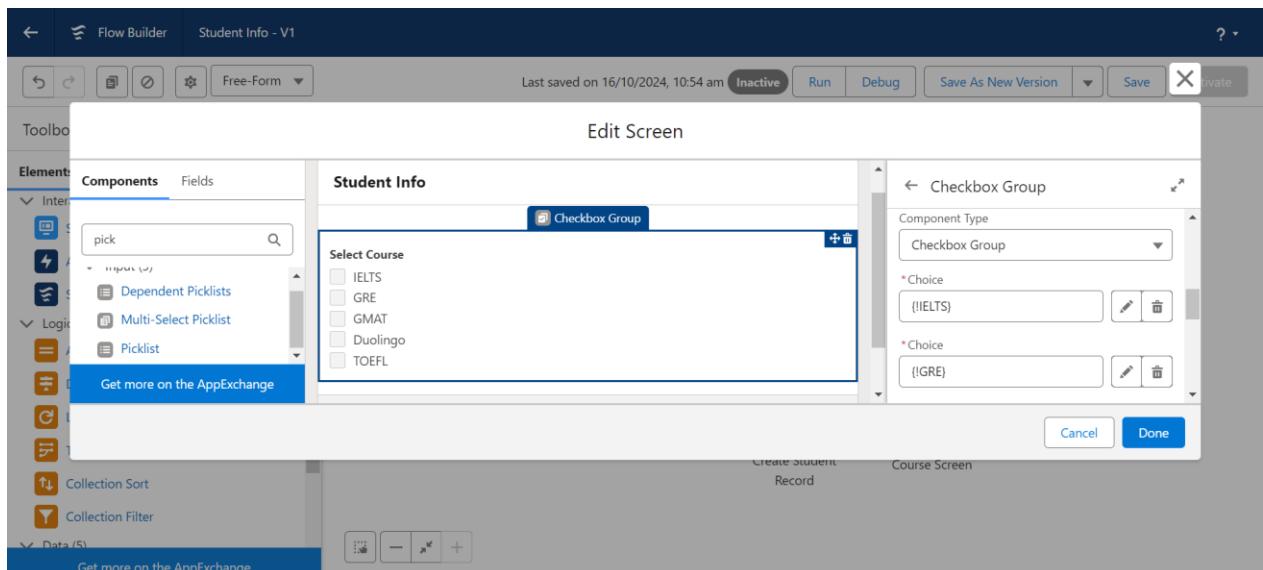
Address

Finish

Create Student Record using Create Element:



Add Screen Element:



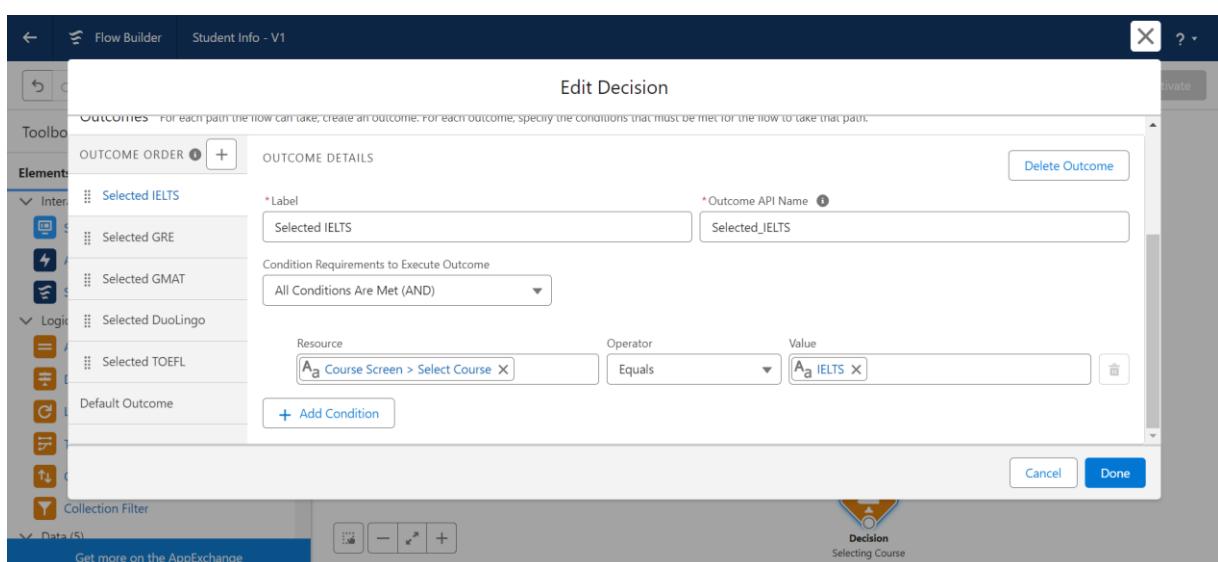
Student Info

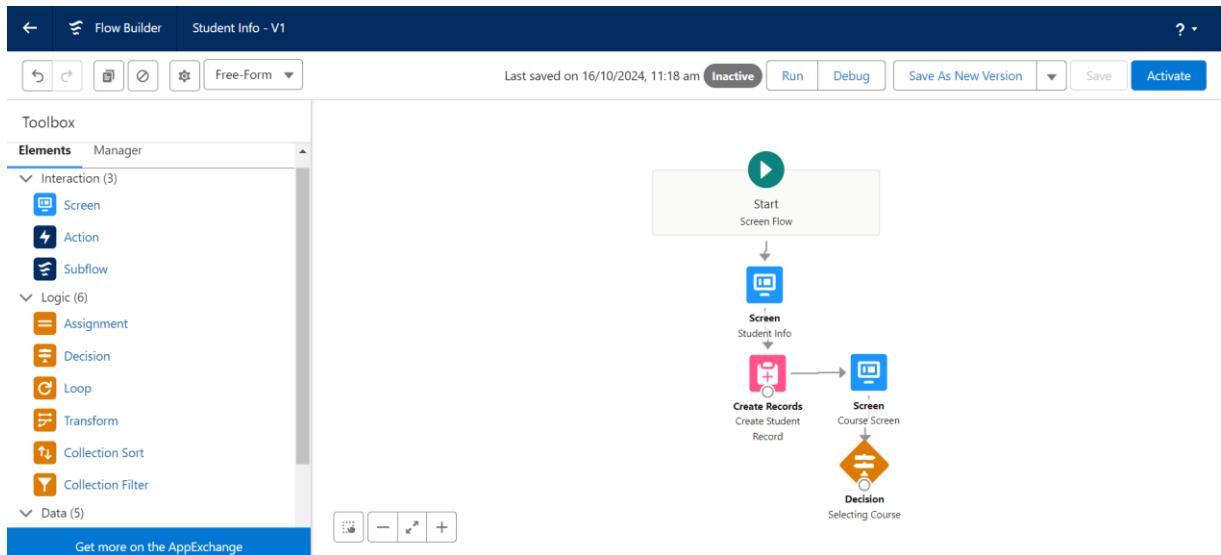
Select Course

- IELTS
- GRE
- GMAT
- Duolingo
- TOEFL

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

Add Decision Element:





Add GET Record Element:

Flow Builder - Student Info - V1

Edit Get Records

Find Salesforce records and store their field values in flow variables.

*Label: Get IELTS Rec *API Name: Get_IELTS_Rec

Description:

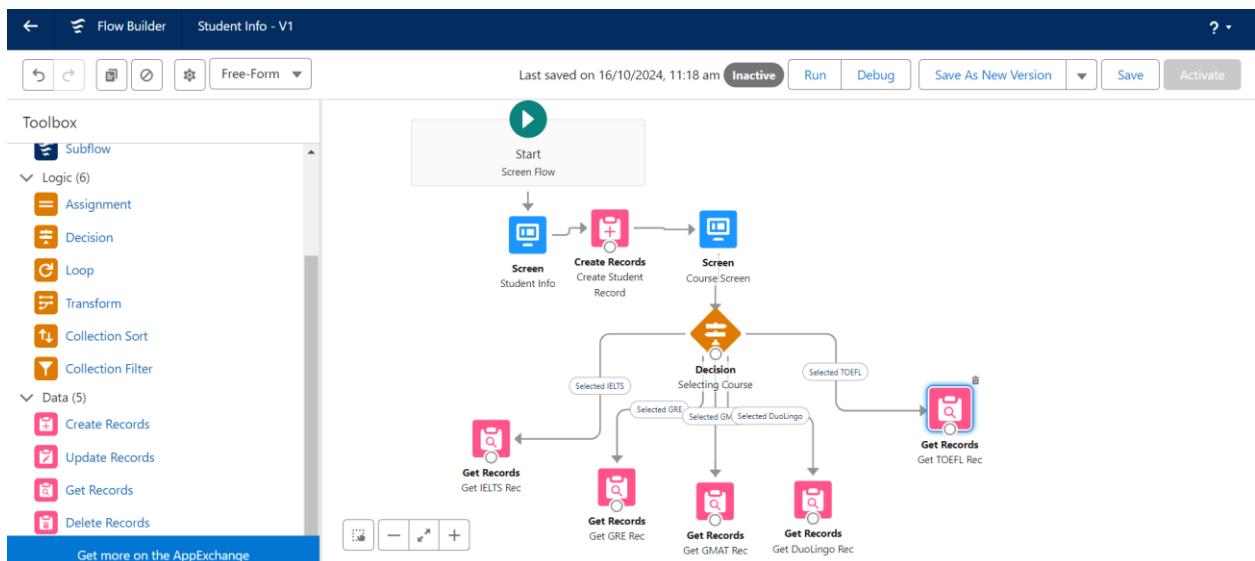
Get Records of This Object

*Object: Course - Course

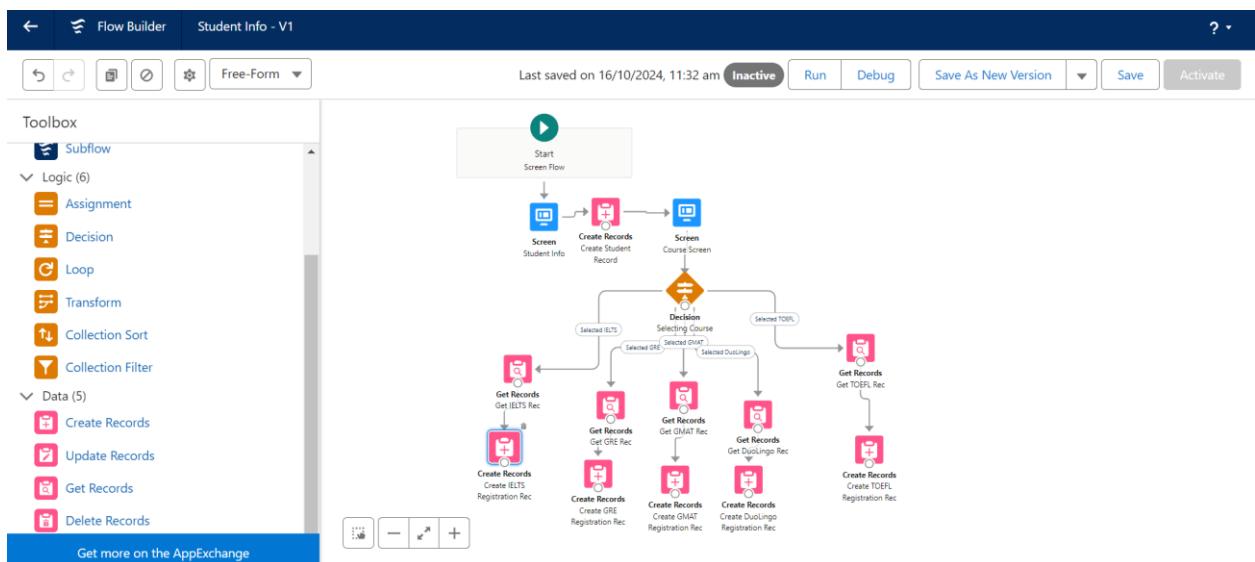
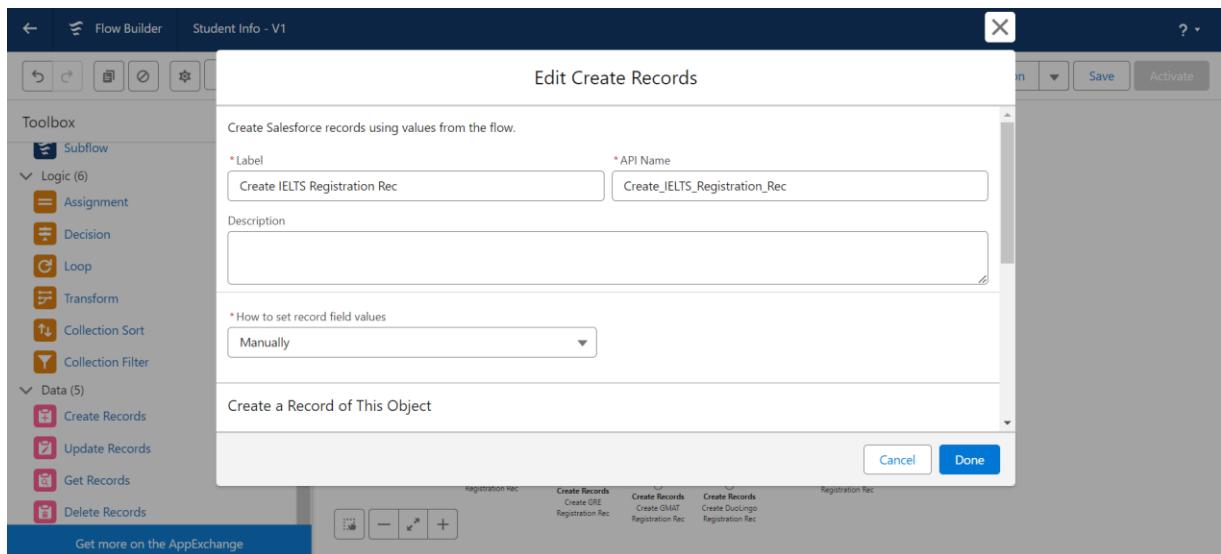
Filter Course - Course Records

Cancel Done

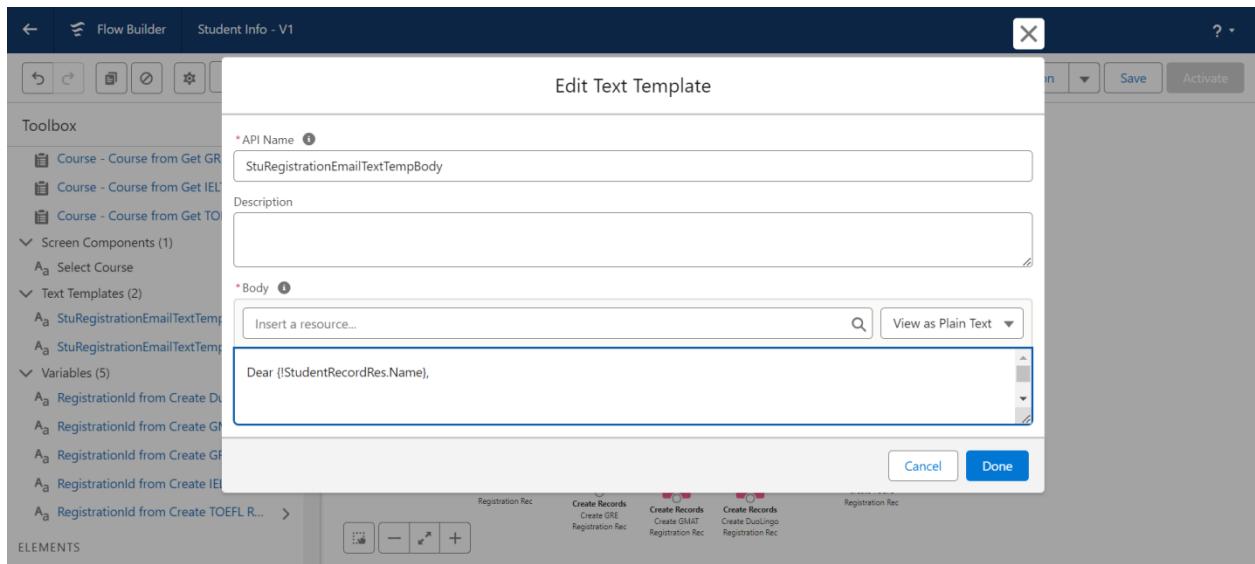
Get more on the AppExchange

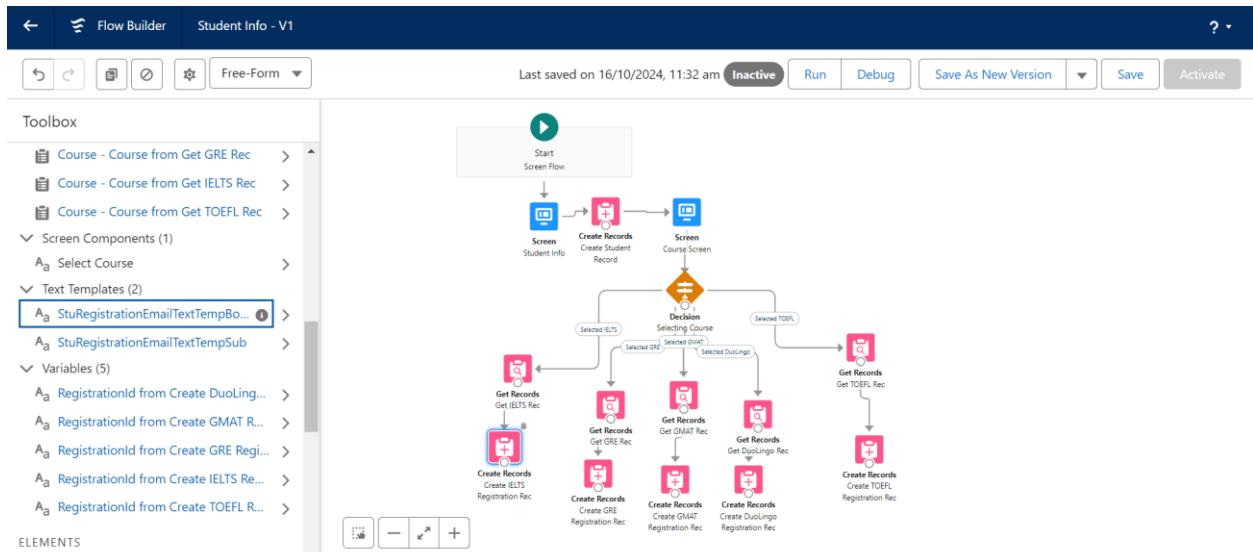


Create Registration Record using Create Records Element:



Create Email Text Template Variables For Email Body And Subject:





Add An Action Element

Flow Builder Student Info - V1

New Action

Action **Send Email**

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

* Label: Send Email to Student API Name: Send_Email_to_Student

Description:

Send Email emailSimple-emailSimple

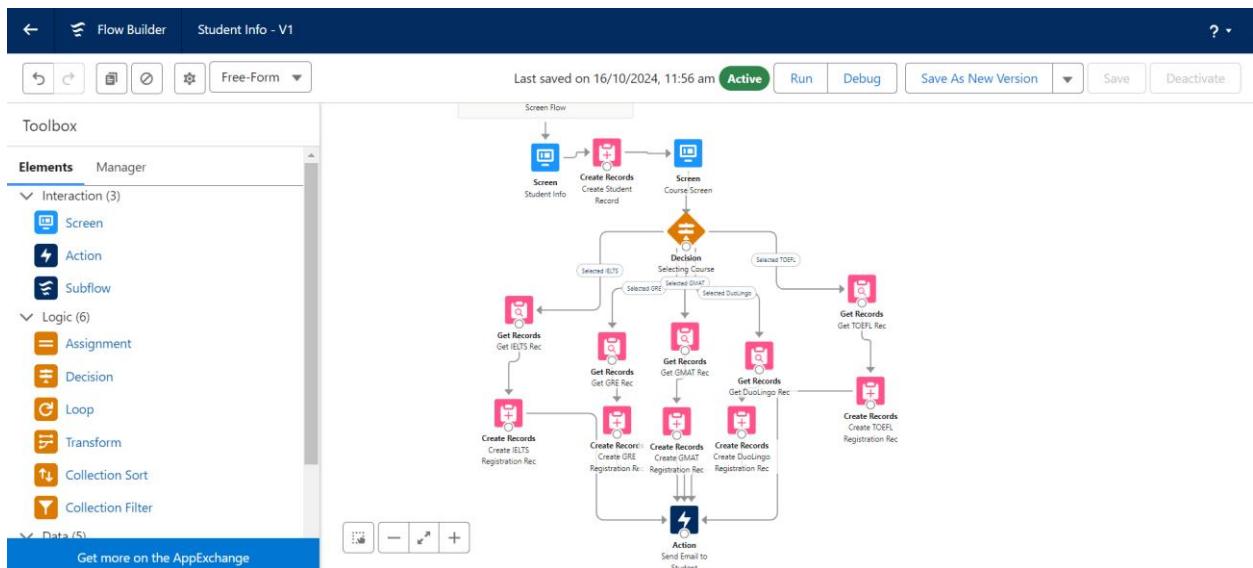
Cancel Done

Toolbox

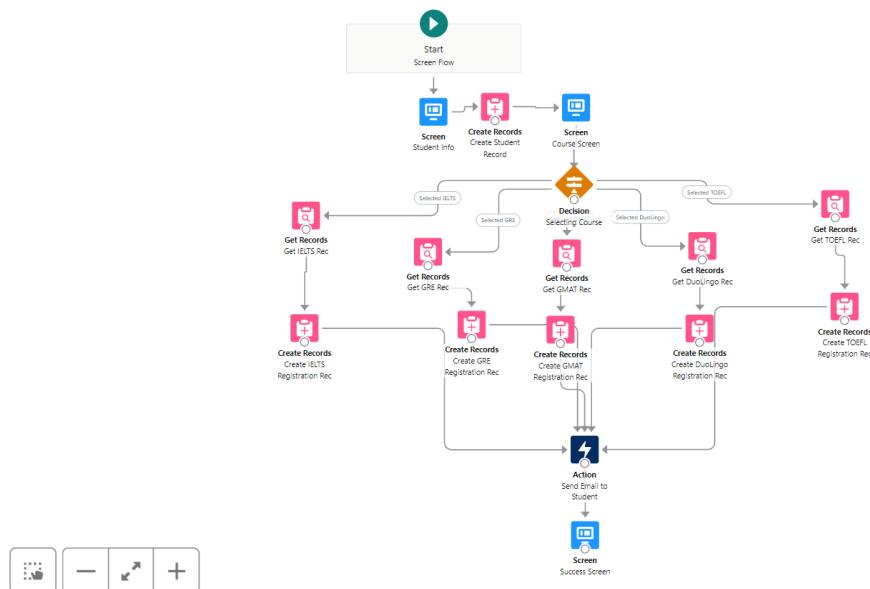
Elements Manager

- Interaction (3)
 - Screen
 - Action
 - Subflow
- Logic (6)
 - Assignment
 - Decision
 - Loop
 - Transform
 - Collection Sort
 - Collection Filter
- Data (5)

Get more on the AppExchange



Add Screen Element:



Create Users

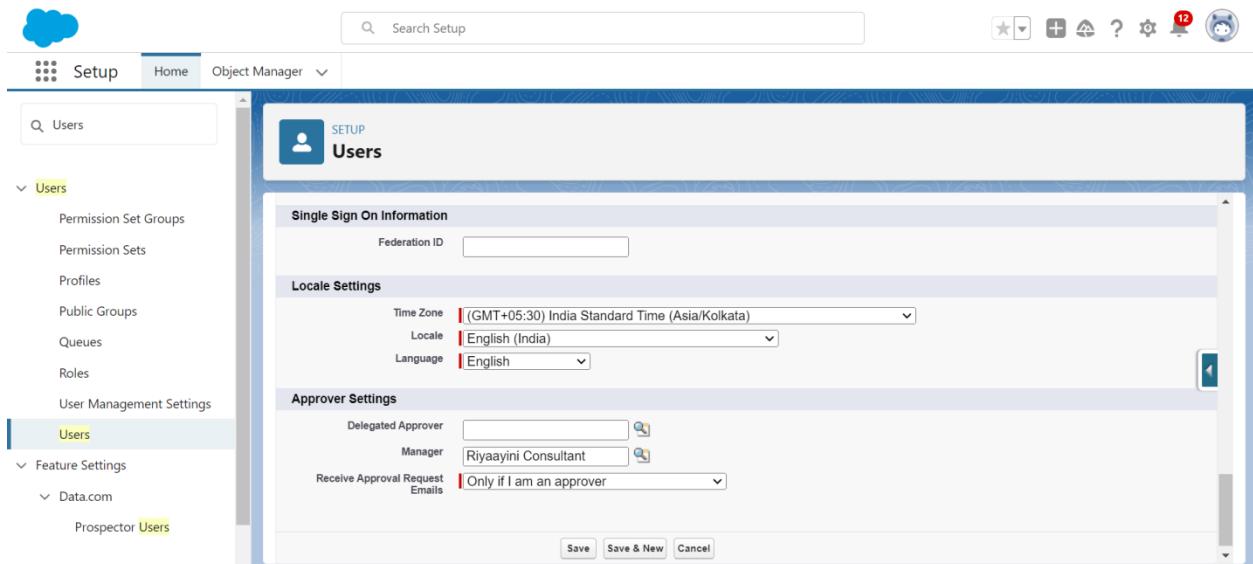
1. Create new Users by navigating to the User section in Salesforce and adding the required user details such as name, profile, and role.
2. Configure User Settings by assigning appropriate profiles and roles to ensure users have the necessary access and permissions to perform their tasks effectively.

User:

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A sidebar on the left lists various user management options. The main area is titled 'New User' and contains a 'User Edit' form. The 'General Information' section includes fields for First Name (Riyaayini), Last Name (Consultant), Alias (cons), Email (riyaayini.31@gmail.com), Username (riyaayini.31@gmail.com), Nickname (User172906147503541605), Title, Company, Department, Division, Role (SVP, Sales & Marketing), User License (Salesforce Platform), Profile (Standard Platform User), and Active status (checked). A note at the top right indicates that Role, User License, and Profile are required information.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A sidebar on the left lists various user management options. The main area is titled 'User Detail' for 'Riyaayini Consultant'. It displays the same user information as the new user screen, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Role (SVP, Sales & Marketing), User License (Salesforce Platform), Profile (Standard Platform User), and Active status (checked). Below the user detail, there are links for 'Permission Set Assignments', 'Public Group Membership', 'Queue Membership', 'Team', 'Managers in the Role Hierarchy', 'OAuth Apps', 'Third-Party Account Links', 'Installed Mobile Apps', 'Authentication Settings for External Systems', 'Login History', and 'User Provisioning Accounts'.

Configure The User Settings:



Create an Approval Process for Property Object

1. Create an Approval Process for the Property object to manage and automate the approval workflow.
2. Develop an Email Template to notify users when a property record is approved or rejected.
3. Configure the Approval Process by defining the steps, approval criteria, and email notifications, ensuring smooth and automated approval handling for the property records.

Create an Email Template:

Salesforce screenshot showing the 'Accounts' report view. The report is titled 'New Accounts Report' and displays a list of accounts. The columns include Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date. The table has 11 rows of account data.

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	- Sale Vamsi krishna	Edge Communications	TX	Customer - Direct	Hot	02/03	
2	- Sale Vamsi krishna	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	02/03	
3	- Sale Vamsi krishna	Pyramid Construction Inc.	-	Customer - Channel	-	02/03	
4	- Sale Vamsi krishna	Dickenson plc	KS	Customer - Channel	-	02/03	
5	- Sale Vamsi krishna	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	02/03	
6	- Sale Vamsi krishna	United Oil & Gas Corp.	NY	Customer - Direct	Hot	02/03	
7	- Sale Vamsi krishna	Express Logistics and Transport	OR	Customer - Channel	Cold	02/03	
8	- Sale Vamsi krishna	University of Arizona	AZ	Customer - Direct	Warm	02/03	
9	- Sale Vamsi krishna	United Oil & Gas, UK	UK	Customer - Direct	-	02/03	
10	- Sale Vamsi krishna	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	02/03	
11	- Sale Vamsi krishna	GenePoint	CA	Customer - Channel	Cold	02/03	

Create An Approval Process:

Create a Record Triggered Flow

1. Create a **Record-Triggered Flow** to automate actions based on record creation or updates.
2. Configure the **Start Element** to define when the flow should be triggered, such as when a record is created or updated.
3. Add an **Action Element** to perform tasks like updating a record, sending an email, or invoking another process based on the triggered event.

Configure the Start Element

Flow Builder

Start
Record-Triggered Flow

Object: Appointment - Appointment Edit
Trigger: A record is created
Optimize for: Actions and Related Records
+ Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Appointment...

End

Configure Start

Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
* Object: Appointment - Appointment

Configure Trigger

* Trigger the Flow When:
A record is created (radio button selected)
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

Flow Builder

Start
Record-Triggered Flow

Object: Appointment - Appointment Edit
Trigger: A record is updated
Optimize for: Actions and Related Records
+ Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Appointment...

End

Configure Start

A record is updated
A record is created or updated
A record is deleted

Set Entry Conditions

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

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

Condition Requirements

None

* Optimize the Flow for:

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

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

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

Add an Action Element

Flow Builder

Start
Record-Triggered Flow

Run Immediately

approval subflow
Action

End

Submit for Approval

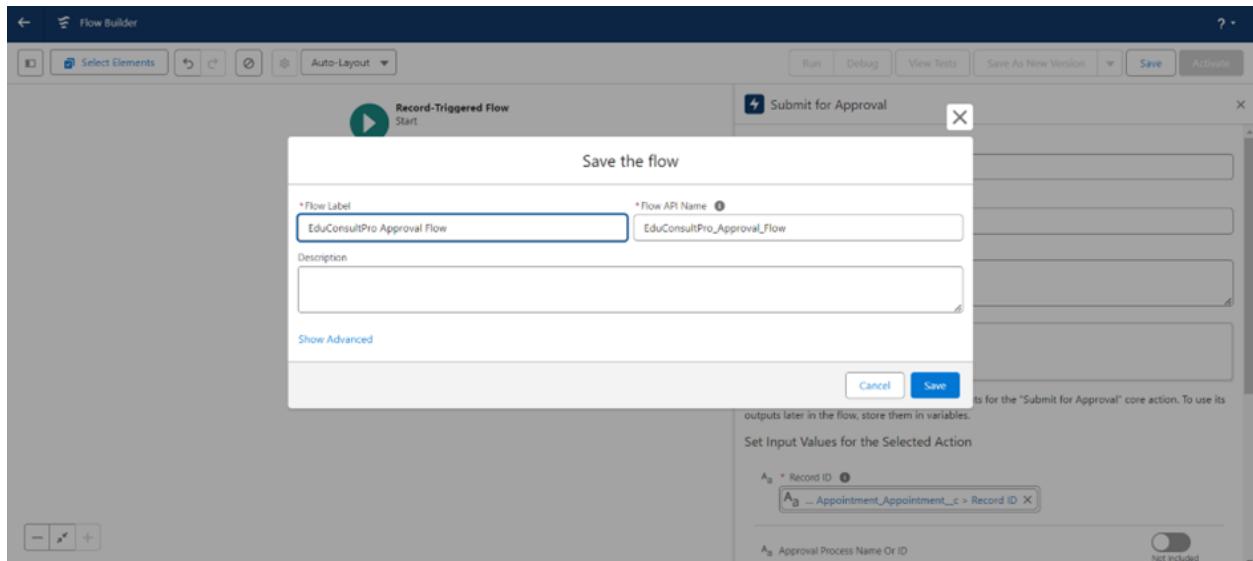
* Label: approval subflow
* API Name: approval_subflow
Description
Submit for Approval
submit-submit

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

Set Input Values for the Selected Action

A_a * Record ID: A_a — Appointment_Appointment_c > Record ID X

A_a Approval Process Name Or ID
Not included



Create a Screen Flow for Existing Student to Book an Appointment

1. Create a Screen Flow for existing students to book an appointment.
2. Add a Screen Element to collect appointment details from the student.
3. Use a Get Records Element to retrieve the student's existing information, such as their contact details or previous appointments.
4. Add another Screen Element to display appointment options or additional instructions.
5. Add a Decision Element to evaluate conditions, such as availability or eligibility for an appointment.
6. Add another Screen Element to confirm the student's selection or collect further input.
7. Use a Get Records Element again to check the availability of consultants or time slots for the appointment.
8. Create an Appointment Record using the Create Records Element to store the appointment details.
9. Add a Screen Element to show confirmation of the booked appointment.
- 10.** Add a Sub Flow Element to invoke any other related flows, such as sending a confirmation email or updating related records.

Add Screen Element

New Screen

Components Fields

Search components...

Slider Text Toggle URL

Display (3)

Get more on the AppExchange

Text

Label Enter Student Name

* API Name

Require

Read Only

Enter value or search resources...

Cancel Done

New Screen

Components Fields

Search components...

Slider Text Toggle URL

Display (3)

Get more on the AppExchange

Text

Label Enter Student Email

* API Name

Require

Read Only

Enter value or search resources...

Cancel Done

Add GET Record Element

Get Records

* Label * API Name

Description

Get Records of This Object

* Object

Filter Student - Student Records

Condition Requirements

All Conditions Are Met (AND)

Field	Operator	Value
Student_Name__c	Equals	<input type="text" value="A_a Enter_Student_Name"/> <input type="button" value="X"/> <input type="button" value="Delete"/>
AND Email__c	Equals	<input type="text" value="A_a Enter_Student_Email"/> <input type="button" value="X"/> <input type="button" value="Delete"/>

Add

Screen

Element

Edit Screen

Student Info Flow

Name : {!Get_Rec.Name},
First Name : {!Get_Rec.First_Name__c},
Last Name : {!Get_Rec.Last_Name__c},
Email : {!Get_Rec.Email__c},
Phone : {!Get_Rec.Phone__c},
Gender : {!Get_Rec.Gender__c},
City : {!Get_Rec.City__c},
Address : {!Get_Rec.Address__c},

How may I help you?
 Book an Appointment
 Immigration Case

Components Fields

Search components...

Input (53)
Action Button
Add Attendees
Address
Call Script
Cancel Appointment
Checkbox
Checkbox Group

Get more on the AppExchange [Get more on the AppExchange](#)

← Radio Buttons

*Choice
({!Book_an_Appointment})

*Choice
({!Immigration_Case})

+ Add Choice

Default Value
Enter value or search resources...

Set Component Visibility

Provide Help

Cancel Done

Add Decision Element

Decision

* Label * API Name

Description

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

OUTCOME ORDER OUTCOME DETAILS

Appointment * Outcome API Name

Default Outcome

Condition Requirements to Execute Outcome

Resource Operator Value

+ Add Condition

Add Screen Element

New Screen

Student Info Flow

Appointment Date/Time
Date Time

Purpose/Topic

Notes

Components Fields

① Add record fields to your screen. [More Info](#)

* Record Variable

Search Appointment - App

Fields (8)
Appointment Date/Time
Appointment No
Consultant - Consultant

Screen Properties

* Label * API Name

Description

Configure Header

Configure Footer

Cancel Done

Add GET Record Element

 Get Records X

* Label	* API Name ?	
Get Consultant Rec	Get_Consultant_Rec	
Description		
<div style="border: 1px solid #ccc; height: 40px; margin-top: 10px;"></div>		
Get Records of This Object		
* Object		
Consultant - Consultant		
Filter Consultant - Consultant Records		
Condition Requirements		
All Conditions Are Met (AND) ▼		
Field	Operator	Value
Name	Equals	A_a AppointmentRecordRes > Co... X Delete
+ Add Condition		

Create Appointment Record using Create Records Element

 Create Records X

* Label	* API Name ?
Create Appointment	Create_Appointment
Description	
<div style="border: 1px solid #ccc; height: 40px; margin-top: 10px;"></div>	
* How to set record field values	
Manually ▼	
Create a Record of This Object	
* Object	
Appointment - Appointment	

Create Records

* Object
Appointment - Appointment

Set Field Values for the Appointment - Appointment

Field <input type="text" value="Appointment Date/Time"/>	Value <input type="text" value="...ointmentRecordRes > Appointment Date/Time"/>	<input type="button" value="Delete"/>
Field <input type="text" value="A_a Consultant - Consultant"/>	Value <input type="text" value="A_a ...nsultant from Get Consultant Rec > Record ID"/>	<input type="button" value="Delete"/>
Field <input type="text" value="A_a Notes"/>	Value <input type="text" value="A_a AppointmentRecordRes > Notes"/>	<input type="button" value="Delete"/>
Field <input type="text" value="A_a Purpose/Topic"/>	Value <input type="text" value="A_a AppointmentRecordRes > Purpose/Topic"/>	<input type="button" value="Delete"/>
Field <input type="text" value="A_a Student - Student"/>	Value <input type="text" value="A_a Student - Student from Get Rec > Record ID"/>	<input type="button" value="Delete"/>
+ Add Field		

Add Screen Element

New Screen

Components Fields

- dis
- ✓ Display (1)
- ✓ Input (1)

[Get more on the AppExchange](#)

Student Info Flow

Display Text

Consultant Name: {!Get_Consultant_Rec.Name},
Date & Time: {!AppointmentRecordRes.Appointment_DateTime__c},
Notes: {!AppointmentRecordRes.Notes__c}

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

Display Text

* API Name

Insert a resource...

Consultant Name:
Date & Time:
Notes:

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

Add an Sub Flow Element

Create a Case

* Label

* API Name

Description

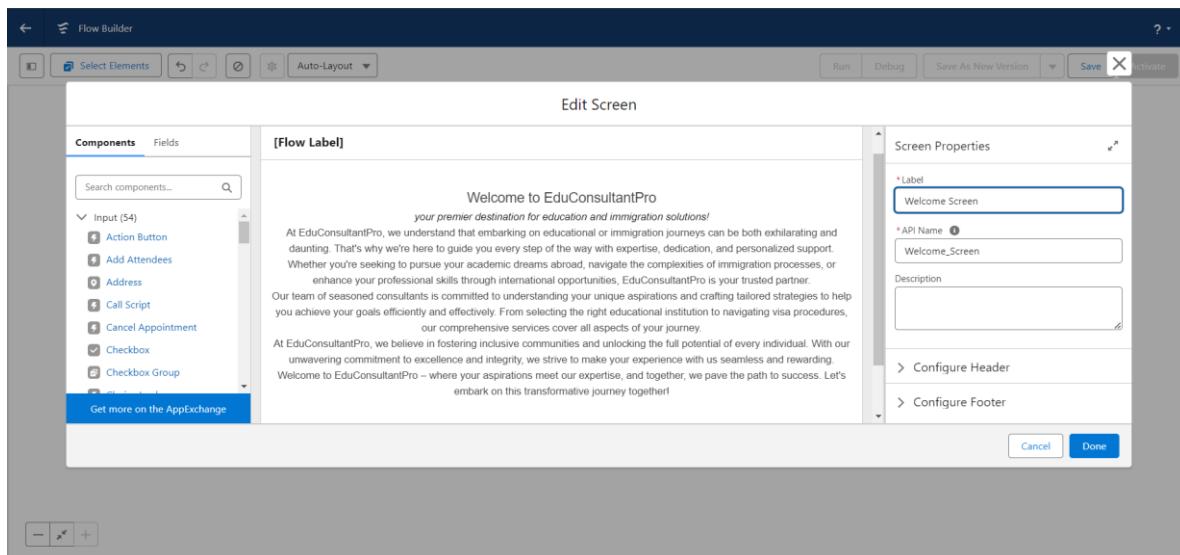
Referenced Flow

 **Create a Case**
setup_service_experience_Create_Case

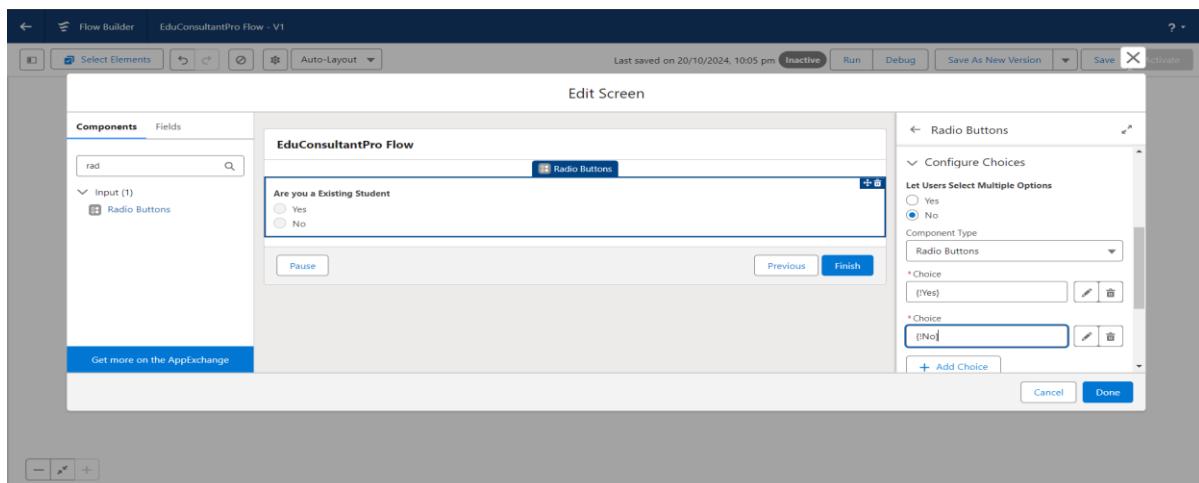
Create A Screen Flow To Combine All The Flows At One Place

1. Create a Screen Flow to combine all the flows into one central process.
2. Add a Screen Element to guide the user through the initial steps or provide instructions.
3. Add another Screen Element to display additional options or gather more information from the user.
4. Insert a Decision Element to evaluate conditions and determine the next steps based on user input or other criteria.
5. Add a Sub Flow Element to invoke another flow for specific tasks, like booking an appointment or processing student data.
6. Add another Sub Flow Element to invoke additional flows as needed, streamlining the overall process.

Add Screen Element



Add Screen Element



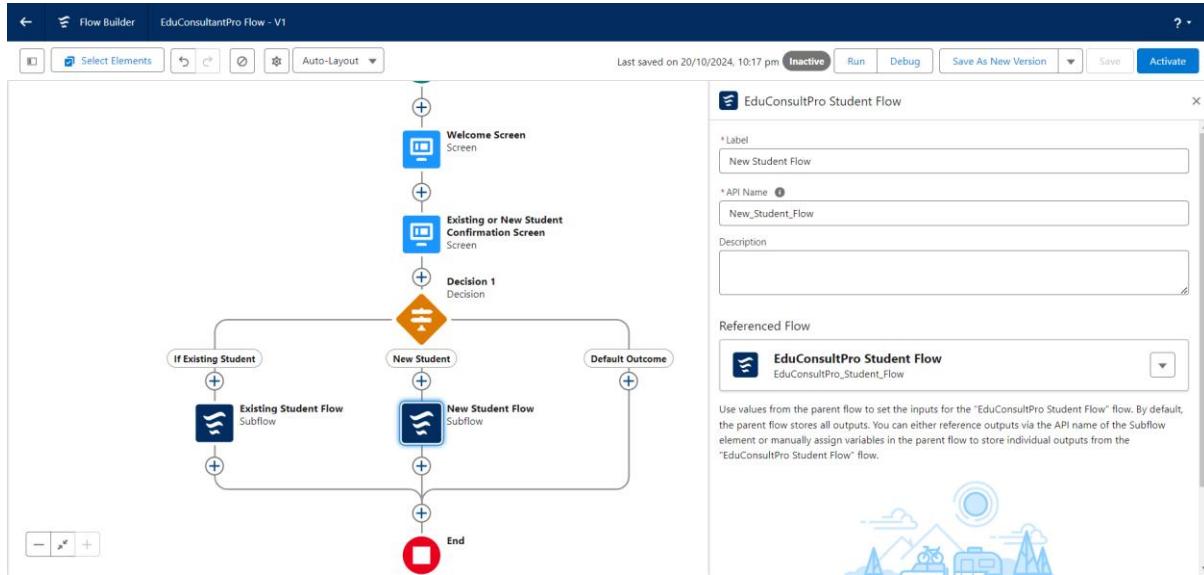
Add Decision Element

The screenshot shows the Flow Builder interface for 'EduConsultantPro Flow - V1'. On the left, a flow diagram starts with a 'Screen Flow Start' node, followed by a 'Welcome Screen' node, an 'Existing or New Student Confirmation Screen' node, and a 'Decision 1' decision diamond. The 'Decision 1' diamond has three outcomes: 'If Existing Student', 'New Student', and 'Default Outcome'. Each outcome leads to a red 'End' node. On the right, a detailed view of the 'Decision 1' configuration is shown. The 'Label' is 'Decision 1' and the 'API Name' is 'Decision_1'. The 'Outcomes' section lists three paths: 'If Existing Student' (Outcome API Name: 'New Student') and 'New Student' (Outcome API Name: 'New_Student'). The 'Default Outcome' is set to 'New Student' with the condition 'All Conditions Are Met (AND)'. A condition requirement is shown: 'Resource: Aa ...n > Are you a Existing Student', 'Operator: Equals', and 'Value: Aa No'. A button '+ Add Condition' is also present.

Add an Sub Flow Element

The screenshot shows the Flow Builder interface for 'EduConsultantPro Flow - V1'. On the left, the flow diagram includes a 'Subflow' element labeled 'Existing Student Flow' under the 'If Existing Student' outcome of the 'Decision 1' diamond. The rest of the flow is identical to the one in the previous screenshot. On the right, a detailed view of the 'Existing Student Flow' subflow is shown. The 'Label' is 'Existing Student Flow' and the 'API Name' is 'Existing_Student_Flow'. The 'Referenced Flow' section shows a reference to 'EduConsultantPro Existing Student Flow' with the subtitle 'Student_Info_Flow'. A note below states: 'Use values from the parent flow to set the inputs for the "EduConsultantPro Existing Student Flow" flow. By default, the parent flow stores all outputs. You can either reference outputs via the API name of the Subflow element or manually assign variables in the parent flow to store individual outputs from the "EduConsultantPro Existing Student Flow" flow.' At the bottom right, there is a decorative illustration of a landscape with mountains, clouds, and a sun.

Add an Sub Flow Element



Create a lightning app page

1. Create a Lightning App Page to customize the layout and design of the application interface.
2. Add relevant components, such as record pages, lists, and charts, to the Lightning App Page to enhance user experience and functionality.

Create a lightning app page

The screenshot shows the Lightning App Builder interface for the "EduConsultPro Home Page". The main canvas area contains a placeholder component labeled "Flow Component: EduConsultPro Flow". To the left is a "Components" sidebar with sections for "Standard (40)" and "App Components". The "Standard (40)" section includes items like Accordion, App Launcher, Assistant, Chatter Feed, Chatter Publisher, CRM Analytics Collection, CRM Analytics Dashboard, Dashboard, Data Mask Console Home Component, Einstein Next Best Action, Flow, Flow App Home cards, Generate Batch Documents, Inventory Lookup Component, and Items to Approve. The "App Components" section is currently empty. On the right side, there is a configuration sidebar with tabs for "Page > Flow" and "Edit Flow in Flow Builder". The "Page > Flow" tab shows a note about flows not running in the canvas. It includes fields for "Flow" (set to "EduConsultPro Flow"), "Edit Flow in Flow Builder" (with a link icon), and "Layout" (set to "One Column"). Below these are sections for "Set Component Visibility" and "Filters".

CONCLUSION:

- The project successfully streamlined the student admission process and improved case management for the Edu Consult Pro Institute.
- Salesforce features like Screen Flows, Approval Processes, and Record-Triggered Flows were utilized to automate tasks and improve efficiency.
- Custom objects and relationships were created to organize student, course, and appointment data effectively.
- A centralized Lightning App was developed to provide easy access to critical information and manage workflows.
- The system improved communication and reduced manual effort, enhancing the user experience for both students and staff.
- Overall, the project optimized the institute's ability to manage student enrollments, appointments, and related processes.